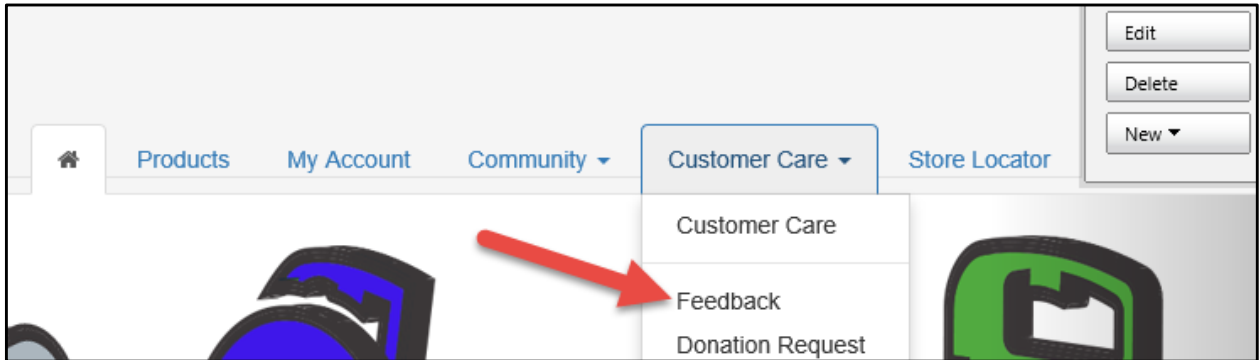


Edit Existing Portal Forms

At the end of this guide, you will be able to edit existing Portal web forms.

Edit Existing Forms

- 1) Login to your Portal as an administrator.
- 2) Click Customer Care and select Feedback.

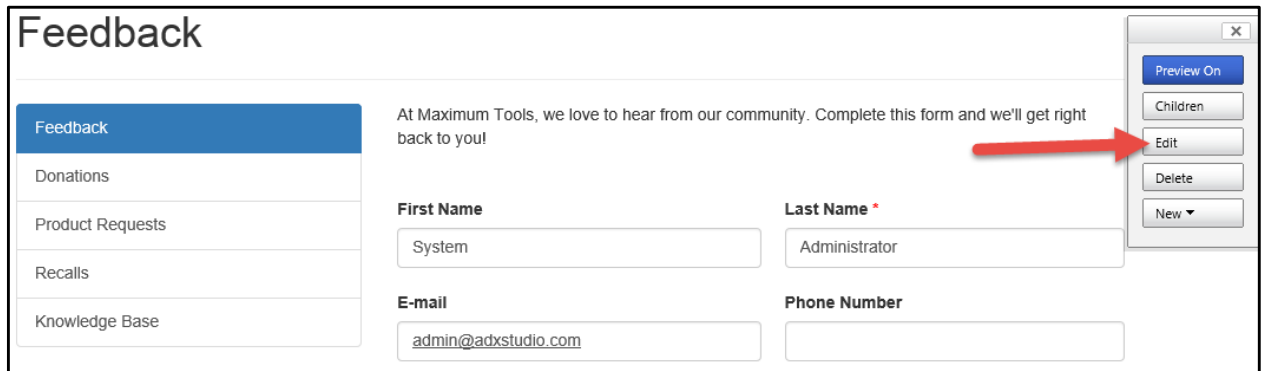


- 3) Take a look at what the form currently looks like. You will move the Topic just below the First Name field and add Middle Name field to form.

A screenshot of the 'Feedback' form. The form title is 'Feedback'. Below the title is a blue sidebar with a 'Feedback' header and a list of categories: 'Donations', 'Product Requests', 'Recalls', and 'Knowledge Base'. The main form area contains the following fields: 'First Name' (with 'System' entered), 'Last Name *' (with 'Administrator' entered), 'E-mail' (with 'admin@adxstudio.com' entered), 'Phone Number', 'Street 1' (with '8201 164th Avenue NE' entered), 'City' (with 'Redmond' entered), 'State/Province' (with 'WA' entered), 'ZIP/Postal Code' (with '98052' entered), 'Country/Region' (with 'USA' entered), 'Topic *' (with an empty dropdown menu), and 'Description'. A red dashed arrow points from the 'Topic *' field to the 'First Name' field. A red speech bubble with the text 'Add Middle Name field here' is positioned above the 'Last Name *' field.

Edit Existing Portal Forms

4) Click Edit.



Feedback

At Maximum Tools, we love to hear from our community. Complete this form and we'll get right back to you!

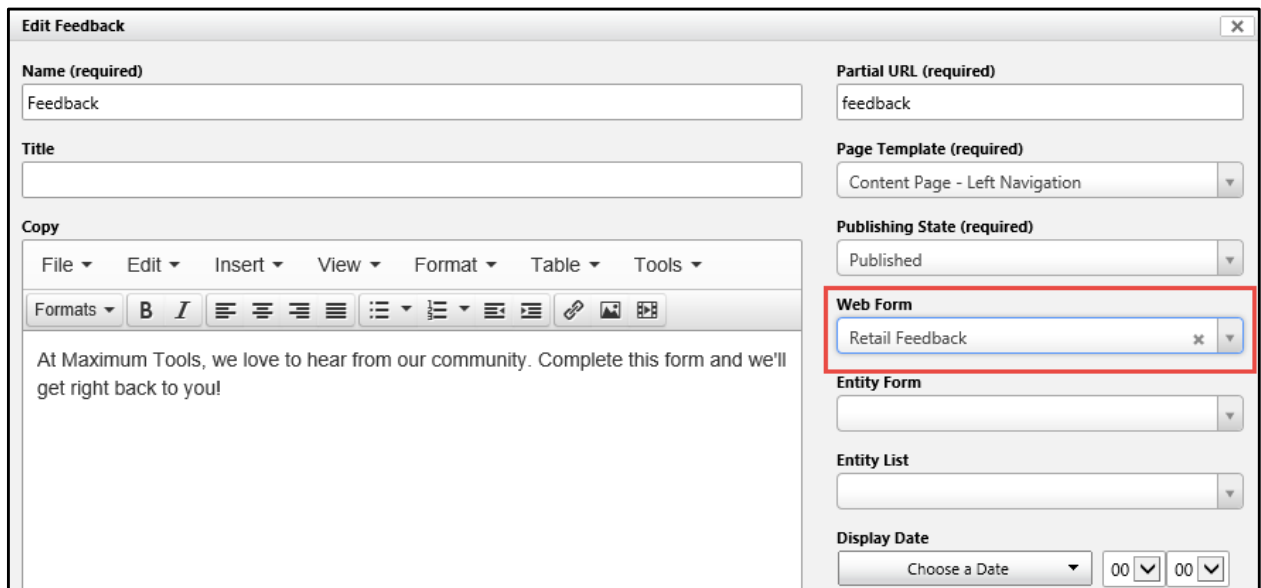
First Name System **Last Name *** Administrator

E-mail admin@adxstudio.com **Phone Number**

Feedback
Donations
Product Requests
Recalls
Knowledge Base

Preview On
Children
Edit
Delete
New

5) Locate the Web Form field and make a note of the selected Web Form. Retail Feedback form is the form we will edit in Dynamics CRM.



Edit Feedback

Name (required) Feedback

Partial URL (required) feedback

Title

Page Template (required) Content Page - Left Navigation

Publishing State (required) Published

Web Form Retail Feedback

Entity Form

Entity List

Display Date Choose a Date 00 00

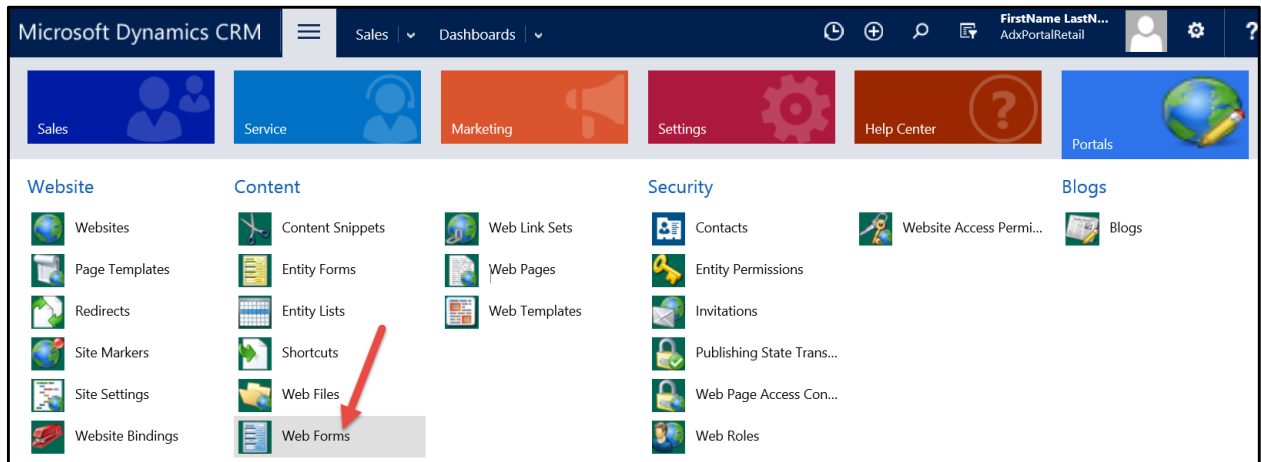
File Edit Insert View Format Table Tools

Formats B I [List Bulleted] [List Numbered] [List None] [Link] [Image] [Media]

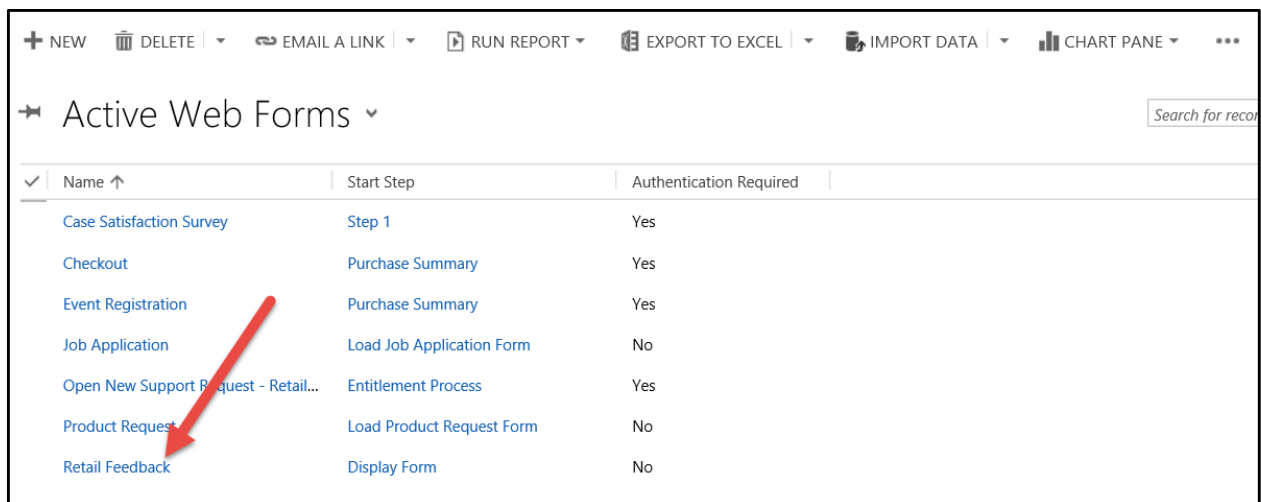
At Maximum Tools, we love to hear from our community. Complete this form and we'll get right back to you!

Edit Existing Portal Forms

6) Go to your Dynamics CRM and navigate to Portals and click Web Forms.

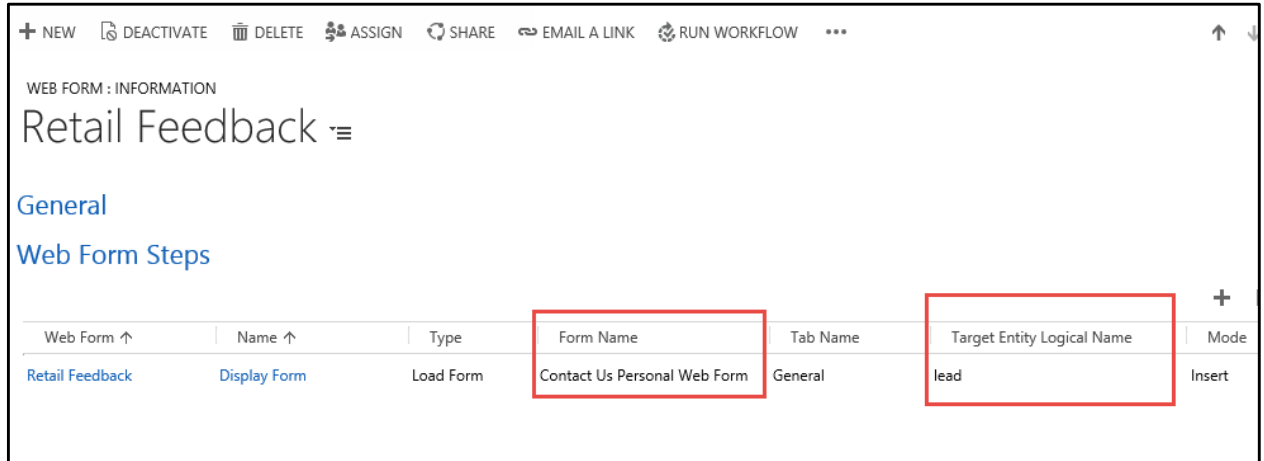


7) Locate the Retail Feedback web form and click on it.



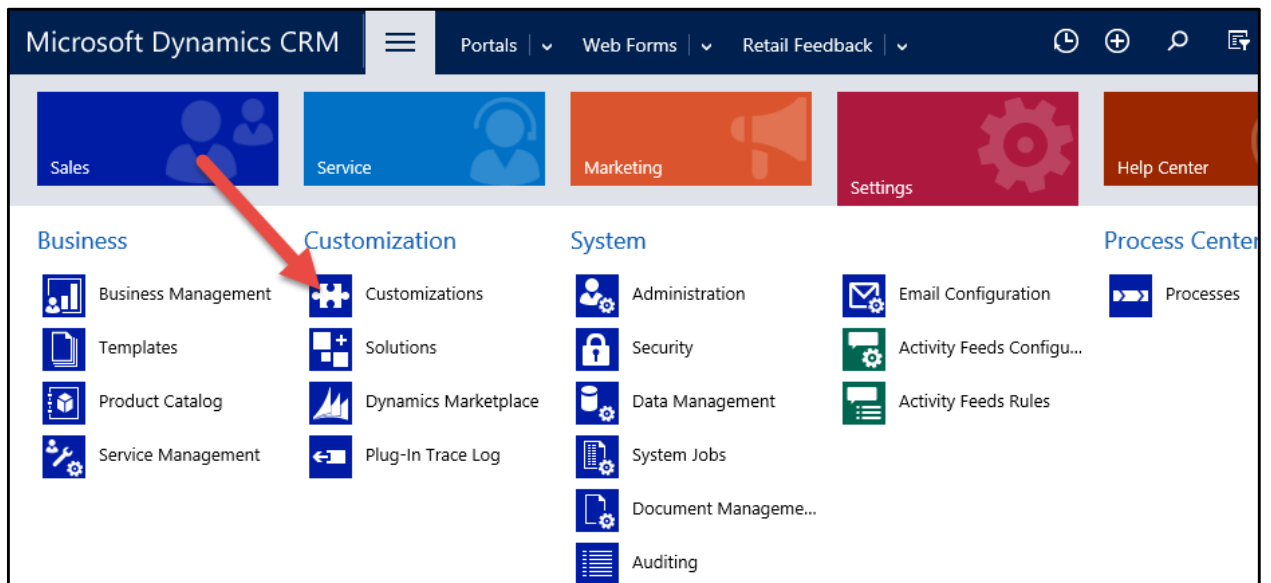
Edit Existing Portal Forms

- 8) We want to know the target entity of the Retail Feedback form and the name of the form. Scroll down to the Web Form Steps tab and take a note of the Target Entity and the Form Name.



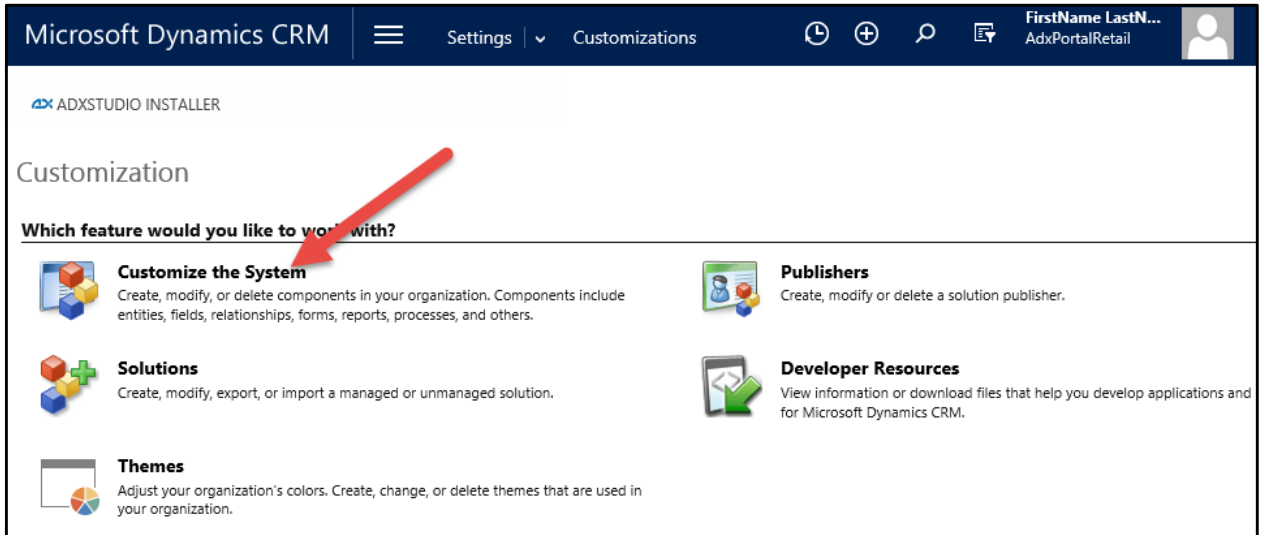
Web Form	Name	Type	Form Name	Tab Name	Target Entity Logical Name	Mode
Retail Feedback	Display Form	Load Form	Contact Us Personal Web Form	General	lead	Insert

- 9) Navigate to Settings | Customizations.

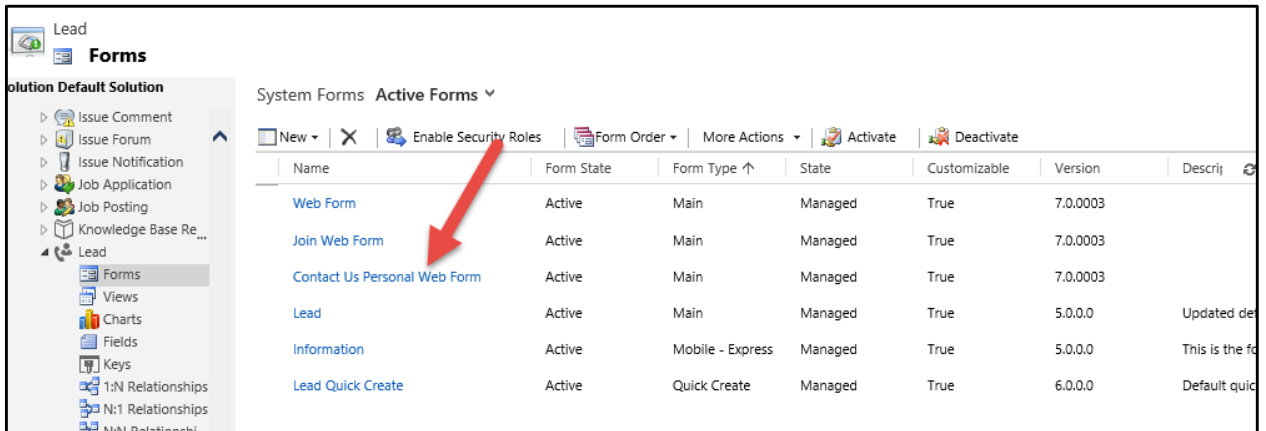


Edit Existing Portal Forms

10) Click Customize the System.



11) Expand Entities, expand the Lead entity, select Forms, locate the Contact Us personal Web Form, and click on it.

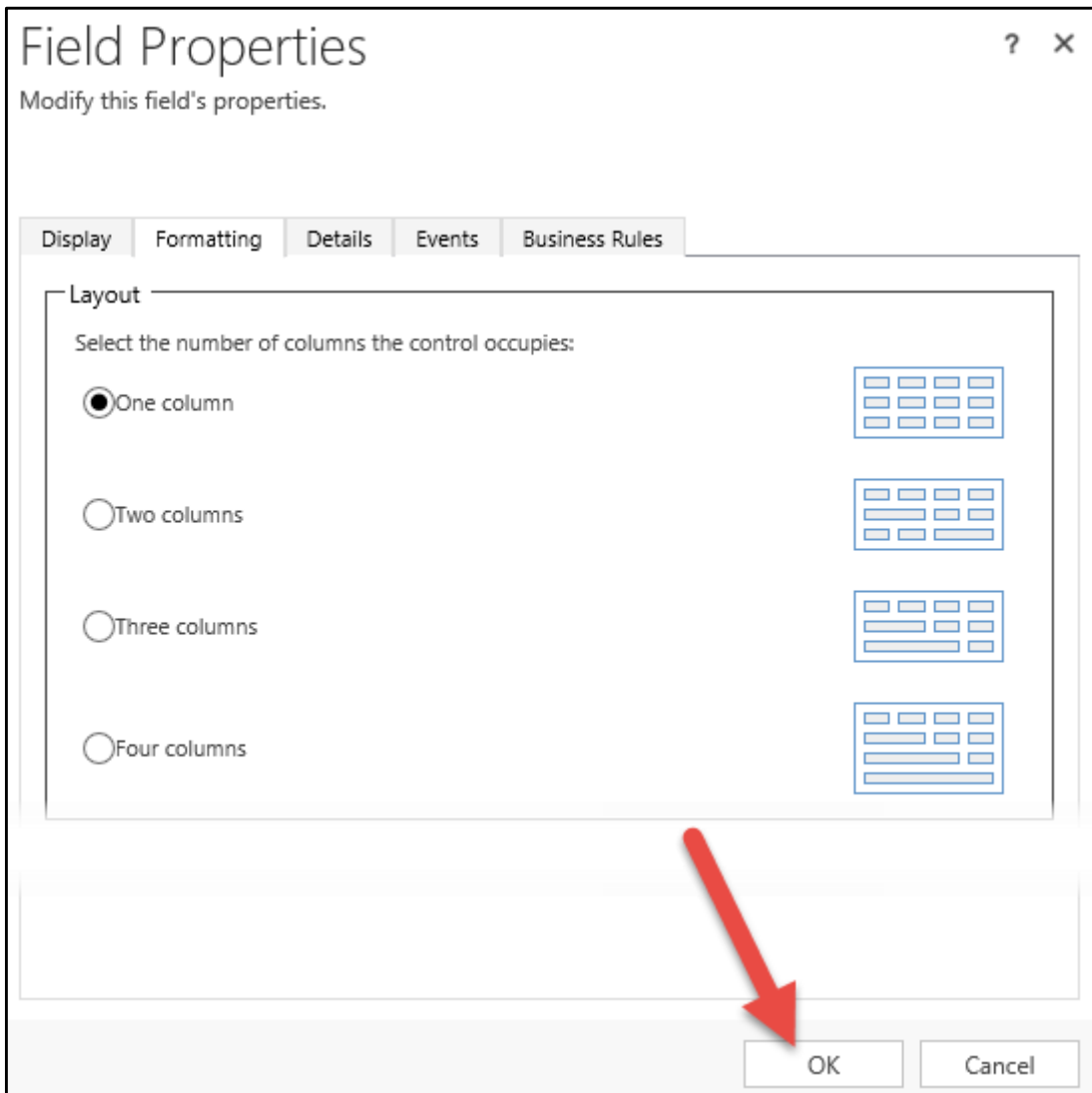


Edit Existing Portal Forms

12) Locate the Topic field and double click to open.

The screenshot shows a CRM form editor interface. On the left is a navigation pane with categories like 'Common', 'Sales', 'Service', 'Marketing', and 'Processes'. The main area displays the 'Lead' form structure, including a 'Header' section and a 'General' section with fields for Name, E-mail, Phone Number, Street 1, City, State/Province, ZIP/Postal Code, Country/Region, Topic, and Description. A red arrow points to the 'Topic' field. On the right, the 'Field Explorer' panel shows a list of fields, including 'Address 1' and its various sub-fields like 'Address Type', 'County', 'Fax', 'Latitude', 'Longitude', 'Name', 'Post Office Box', 'Shipping Method', 'Telephone 1-3', 'UPS Zone', and 'UTC Offset'.

- 13) Select the Formatting tab, change the layout from two columns to one column, and click OK.



Edit Existing Portal Forms

14) Move the Topic field below the First name field.

The screenshot shows the 'Lead' form editor interface. On the left is a navigation pane with categories like 'Contact Us Personal W...', 'Common', 'Sales', 'Service', 'Marketing', and 'Processes'. The main area displays the form layout for 'Solution: Default Solution' and 'Form: Lead'. The 'General' section contains several fields: 'First Name', 'Last Name', 'Topic', 'Phone Number', 'Home Phone', 'E-mail', 'Street 1', 'City', 'State/Province', 'ZIP/Postal Code', and 'Country/Region'. The 'Topic' field is highlighted with a red rectangular box.

15) From the Field Explorer locate the Middle Name field.

This screenshot shows the same 'Lead' form editor as above, but with the 'Field Explorer' panel open on the right side. The 'Field Explorer' has a 'Filter' set to 'All Fields' and a checked option for 'Only show unused fields'. A list of fields is displayed, including 'Job Title', 'Last Campaign Date', 'Marketing Material', 'Merged', 'Middle Name', 'Mobile Phone', 'Modified By', 'Modified By (Delegate)', and 'Modified On'. The 'Middle Name' field is highlighted with a red rectangular box.

Edit Existing Portal Forms

16) Add the Middle Name field to the form and place it just below the Last Name Field.

The screenshot shows the Microsoft Dynamics CRM interface for editing a 'Lead' form. The 'General' section is expanded, and the 'Middle Name' field is highlighted with a red box. The field is positioned below the 'Last Name' field. The 'Field Explorer' on the right shows a list of fields, including 'Job Title', 'Last Campaign Date', 'Marketing Material', 'Merged', 'Mobile Phone', 'Modified By', 'Modified By (Delegate)', 'Modified On', 'Name', 'Need', and 'No. of Employees'.

17) Click Save and Close.

The screenshot shows the Microsoft Dynamics CRM interface for editing a 'Lead' form. The ribbon is visible, and the 'Save and Close' button is highlighted with a red arrow. The 'Save and Close' button is located in the 'FILE' tab, under the 'HOME' group. The 'Lead' form is visible in the background, showing the 'Header' section.

18) Publish All Customizations.

The screenshot shows the Microsoft Dynamics CRM interface for publishing all customizations. The 'Publish All Customizations' button is highlighted with a red arrow. The 'Forms' section is expanded, and the 'Lead' form is selected. The 'System Forms' and 'Active Forms' tabs are visible. The 'Active Forms' tab is selected, and the following table is displayed:

Name	Form State	Form Type	State	Customizable	Version	Description
Web Form	Active	Main	Managed	True	7.0.0003	
Join Web Form	Active	Main	Managed	True	7.0.0003	
Contact Us Personal Web Form	Active	Main	Managed	True	7.0.0003	
Lead	Active	Main	Managed	True	5.0.0.0	Updated d...
Information	Active	Mobile - Express	Managed	True	5.0.0.0	This is the s...

Edit Existing Portal Forms

- 19) Close the solution explorer.
- 20) Go back to your Portal and navigate to the feedback page. The form will be updated, and it will look like the image below.

At Maximum Tools, we love to hear from our community. Complete this form and we'll get right back to you!

Feedback

Donations

Product Requests

Recalls

Knowledge Base

First Name
System

Last Name *
Administrator

Topic *
[Empty]

Middle Name
[Empty]

E-mail
admin@adxstudio.com

Phone Number
[Empty]

Street 1
8201 164th Avenue NE

City
Redmond

State/Province
WA

ZIP/Postal Code
98052

Country/Region
USA

Description
[Empty]

Preview On

Children

Edit

Delete

New

This concludes the *Edit Existing Portal Forms* guide.