

**Scaleable Forms**  
The Missing Link...

*A True Integration between TYPE-FORM & MSD365- Business Central*

# USER GUIDE

SCALEABLE FORMS – A SOLUTION FOR MICROSOFT DYNAMICS 365 BUSINESS CENTRAL

BY



## DISCLAIMER

This document is presented with explicit understanding that all contents of this document are confidential and shall not be divulged to any third party without prior written consent of Scaleable Solutions Pvt. Ltd.

All services are provided according to our terms and conditions.

## SCALEABLE FORMS

*Scaleable Solutions offers a true integration between Typeform and Microsoft Dynamics 365 Business Central.*

Scaleable Forms is a robust Addon, offered for the first time for Microsoft Dynamics Business Central.

Typeform is a great tool to engage your audience through conversational forms & surveys. Typeform allows user to create dynamic forms and surveys based on their needs. These forms can be used for generating Contact, Company, Opportunity, Survey, Questionnaire, Registration, Invoice or can be used for any other specific business need.

Scaleable Forms helps user to get back responses of contact, company, opportunity or any other form entity back to Business Central.

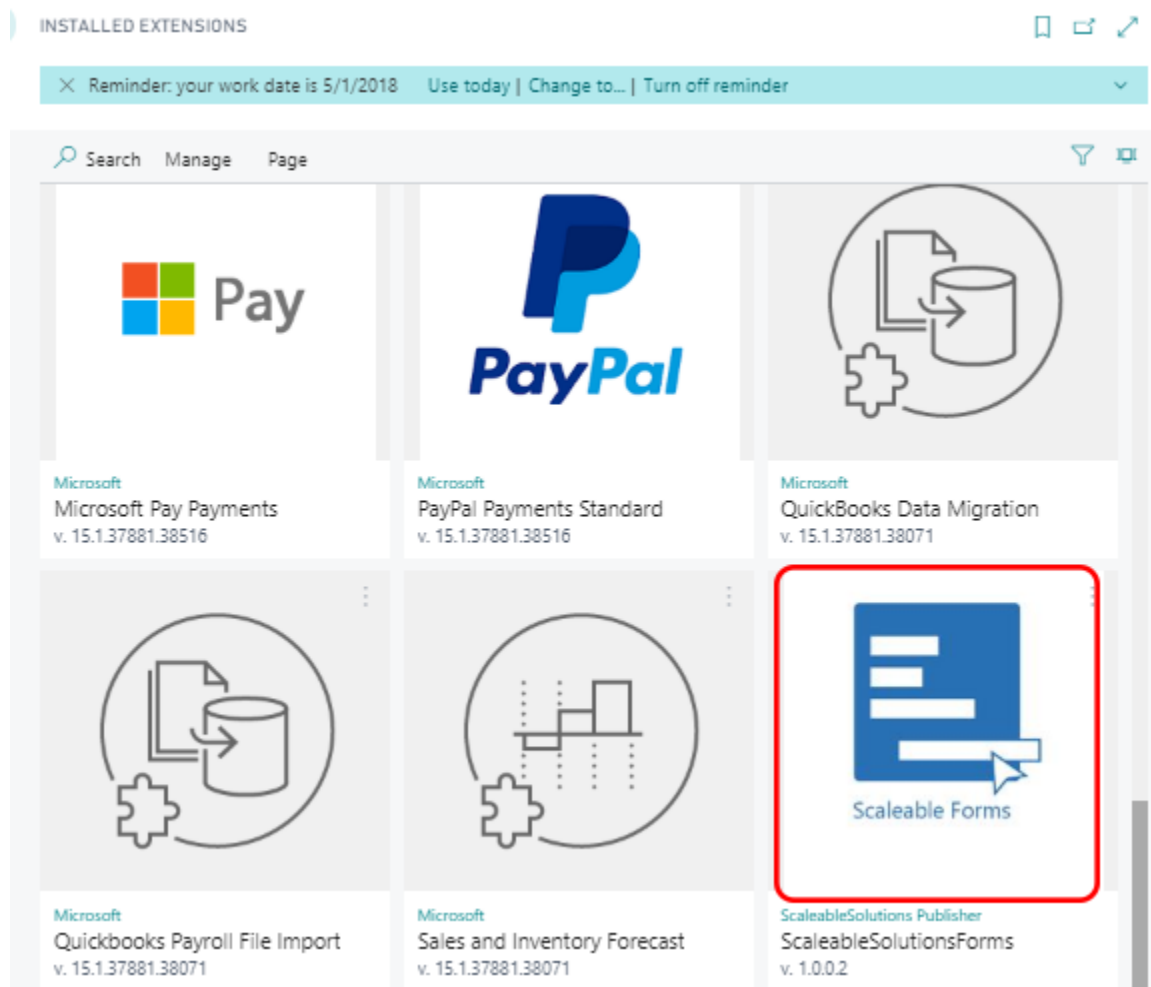
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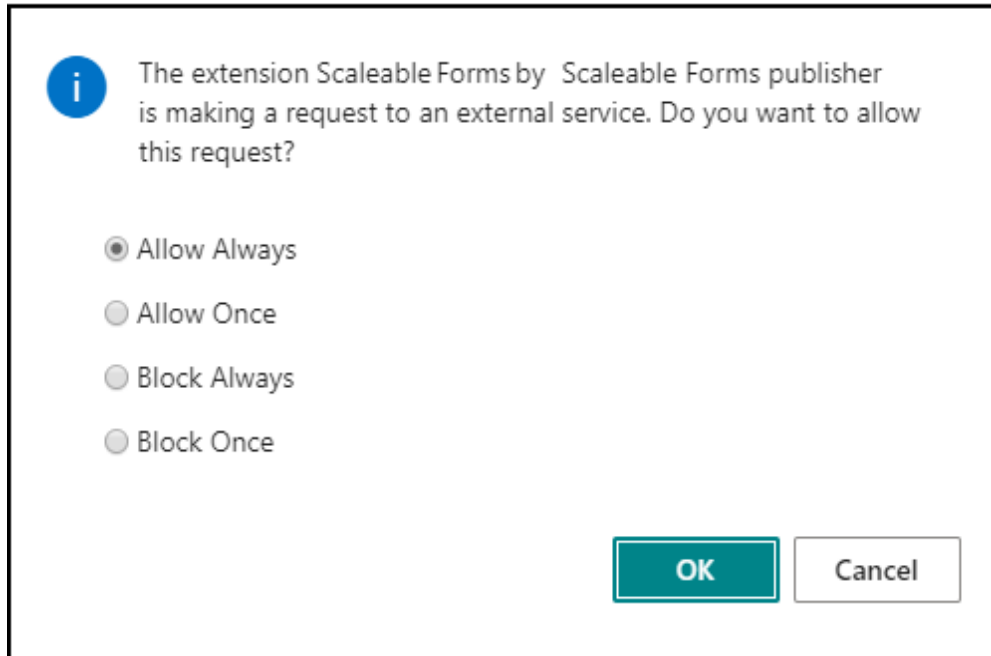
## How to get started

Install extension in Business Central:

Download the application from App Source. The application will be downloaded in Business Central as an extension.



As this extension is calling external API (TypeForm) so check **“Allow Always”** to continue without any interruption.



**Note:** You will not be able to use this extension if you check **“Block Always”** or **“Block Once”**

Registration:

For Registration first Search for “Scaleable Forms”

TELL ME WHAT YOU WANT TO DO



scaleable Forms


Go to Pages and Tasks


> Scaleable Forms

Administration

Click on **Scaleable Forms**

Or go to “My Settings” and find Scaleable Solutions as Role Center. Click OK.

EDIT - MY SETTINGS 

Role .....	Scaleable Forms	...
Company .....	scaleable solutions	...
Work Date .....	5/1/2018	
Region .....	English (United States)	...
Language .....	English (United States)	...
Notifications .....	<a href="#">Change when I receive notifications.</a>	

Your last sign in was on 12/23/19 12:16 PM.

**OK** Cancel

Now Register yourself by clicking on the “**Registration**” and fill out the required fields.

WELCOME TO,  
**Scaleable Forms**, The Missing  
Link...


● ○ ○ ○

Activities

Registration



Fill out the General Information.



General Information


First Name *	Last Name *
<input type="text" value="Mark"/>	<input type="text" value="Angel"/>
Company *	Phone *
<input type="text" value="Scaleable Solutions"/>	<input type="text" value="+123456789101"/>
Email *	
<input type="text" value="Mark@scaleablesolutions.com"/>	
Alternate Email	
<input type="text" value="Alternate Email"/>	
Country *	State *
<input type="text" value="United States of America (USA)"/>	<input type="text" value="Florida"/>
City *	Zip *
<input type="text" value="Miami"/>	<input type="text" value="33101"/>
Address *	
<input type="text" value="House 10"/>	
Address Line 2	
<input type="text" value="Address Line 2"/>	

Next →

Click **Next**.

Select your Subscription Plan.

Scaleable Forms Registration



Scaleable Forms  
The Missing Link...

Subscription Plan

Select Package

	Trial Free	Essentials \$50 /mo/org	Professional \$70 /mo/org	Premium \$90 /mo/org
Responses	500	1000/mo	5000/mo	10000/mo
Unlimited Configurations	✓	✓	✓	✓
Billed	7 days	Monthly ▼	Monthly ▼	Monthly ▼
	<div>TRY NOW</div>	<div>BUY NOW</div>	<div>BUY NOW</div>	<div>BUY NOW</div>

Looking for a Custom Plan? Contact Sales Team [sales@scaleablesolutions.com](mailto:sales@scaleablesolutions.com)

Promo Code

Verify Code

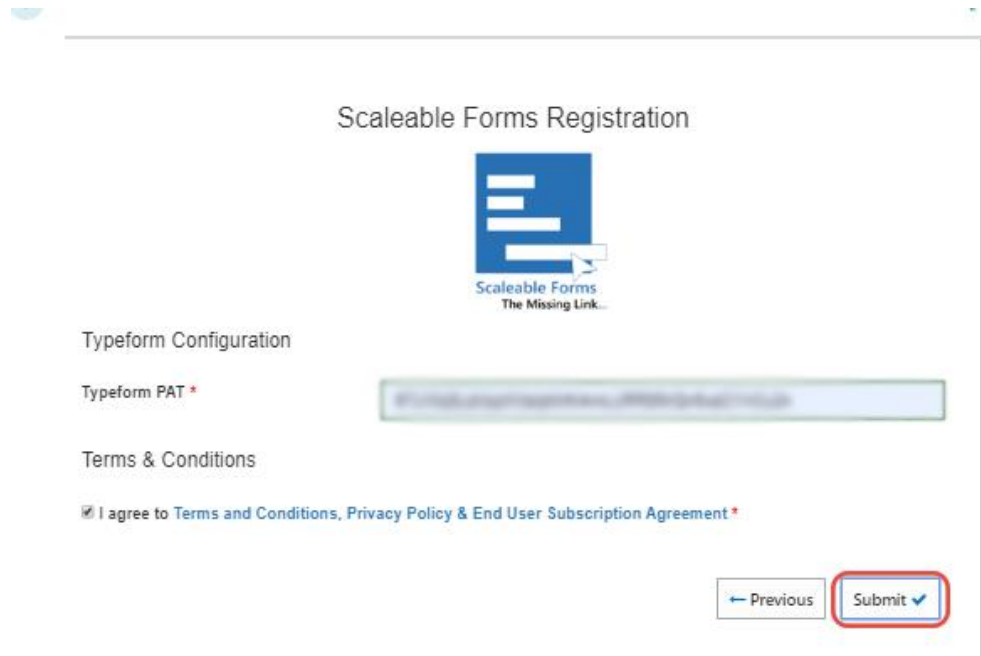
← Previous

Next →

Click **Next**



Enter your Typeform PAT



Check **Terms and Conditions** and then **Submit**.

How to get Typeform PAT

Login to your Typeform account. If you don't have an existing account, click on the link to create one <https://admin.typeform.com/signup>

After Logging in to your account Go to **Settings > Profile > Personal Token** > Click on **Generate New Token**.

### Personal tokens

These are the tokens you registered to use one of Typeform's APIs.

Generate a new token

Here's your token—keep it safe



Personal access token

578qpm4FV1C2864m4ub4Fv1Guy#BX5maga41m4u4K

Copy

We'll show you this token just once

This token will disappear when you click "Got it". Don't worry, you can regenerate it if you lose this one.

Got it

In case you have lost your PAT, you can always generate new token from your Type Form account

After completing your registration, you will receive invoice via email on provided email address. In case you didn't receive Invoice reach us at [support@scaleablesolutions.com](mailto:support@scaleablesolutions.com)

## Mark Angel (Scaleable Solutions)

I am contacting you regarding the invoice #INV-324c4703-55bf-43de-8756-ed95bf475284 that has been created on your account.

Invoice: #INV-324c4703-55bf-43de-8756-ed95bf475284  
Amount Due: 60 USD  
Due By: 1/15/2020 12:00:00 AM

**Pay this invoice**

**INVOICE: #INV-324c4703-55bf-43de-8756-ed95bf475284**  
Issue date: 2020-01-10  
Due by: 2020-01-15

FROM	BILLED TO
Name: Scaleable Solutions Pvt. Ltd Address: Capital Tower B G-15 Markazi, Islamabad 44000 Country: Pakistan Phone: +92-21-913031 Email: invoice@scaleablesolutions.com	Name: faiz sidiqui (Scaleable Solutions) Address: ARC58 Country: Finland Email: faizsidiqui@yahoo.com

**SUMMARY**

Click "Pay this invoice"

ENVOICE

PAY WITH:

Payoneer

Total amount: \$50

Login

Sign up

View All

Download

Reject


Mark as paid

**Note:** It might take some time to receive the payment. Payment status will not change unless payment is received however, application will be available for 5 days when the registration form is submitted unless payment is received.


Activities

---


Registration




Registration




Typeform PAT



New Configuration



Existing Configurations



Configuration Errors

← ✎ + 🗑️ ✓ SAVED 🔖 📁 ↗️

## Typeform PAT

✕ Reminder: your work date is 5/1/2018 Use today | Change to... | Turn off reminder ▼

---

Personal Access Token ..... ETUfhgBunqphvqjivKAnLURB8KQrSocYHCuH

## Permissions:

You can assign permissions to Scaleable Form Users.

Search for effective permissions and then click.

TELL ME WHAT YOU WANT TO DO



Effective permissions

Go to Pages and Tasks

> Effective Permissions

1

Administration

Here select **“Permission Set by Users”**

← EFFECTIVE PERMISSIONS ✓ SAVED

✕ Reminder: your work date is 5/1/2018 Use today | Change to... | Turn off reminder

---

GENERAL

User ..... Jane ... Show All Objects ..... ☐

Company ..... CRONUS USA, Inc. ...

Permission Sets **Permission Set by User** | More options

PERMISSIONS **2**

	Object Type ↑	Object Name	Read Permission	Insert Permission	Modify Permission	Delete Permission	Execute Permission	In User- Defi... Per... Set
→	Table Data	Payment Terms	Yes	Yes	Yes	Yes		<input type="checkbox"/>
	Table Data	Currency	Yes	Yes	Yes	Yes		<input type="checkbox"/>
	Table Data	Finance Charge Terms	Yes	Yes	Yes	Yes		<input type="checkbox"/>
	Table Data	Customer Price Group	Yes	Yes	Yes	Yes		<input type="checkbox"/>
	Table Data	Standard Text	Yes	Yes	Yes	Yes		<input type="checkbox"/>

And then assign the permissions to Scaleable Forms users as per your need.

**Dynamics 365 Business Central**

← PERMISSION SET BY USER | WORK DATE: 4/8/2019

**GENERAL**

Company Name ..... CRONUS USA, Inc. Show Domain Name ..... ☐

Process Browse Actions Navigate Fewer options

Permission Set ↑	Name	Extension Name	All Users	Jane	John	
SECURITY	Dynamics 365 U...		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SUPER	This role has all ...		<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
TEST TOOL	Test Tool		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
TROUBLESHOOT TOOLS	Troubleshoot To...		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
→ SCALEABLEFORMS READ	Scaleable Forms ...	BCScaleableForms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
SCALEABLEFORMS SUPER	Scaleable Forms ...	BCScaleableForms	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
INTELLIGENTCLOUDBASE	Intelligent Cloud...	Intelligent Cloud Base	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
MSWALLETSTANDARD	MSWallet Permis...	Microsoft Pay Payments	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SCAPTIFY	Scaptify	Scaptify	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SHOPIFY_SUPER	Shopify Super U...	Scaptify	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
DIOT - LOCALIZATION	DIOT - Localizati...	DIOT - Localization for Mexico	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
AMCBANKING365FUNDAME	AmcBanking365...	AMC Banking 365 Fundamentals	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**Perm**

Object ↑

**Tena**

Object ↑

Page

Page

- User with **“Scaleable forms Read”** permission will only be allowed to read objects of Scaleable form, contacts, companies and opportunities.
- User with **“Scaleable forms Super”** permission will have all permissions of Scaleable Forms objects and can also create contacts, companies and opportunities.

## How it works

### Creating form in Type-Form

Create any type of form as per your requirements in Type-Form. How to create a form [click here](#).

The screenshot displays a form configuration interface with a header bar and a sequence of five steps:

- Header:** A light gray bar at the top contains a green icon with a list, a text input field with the placeholder "Got questions? Want to tell us something? Looking for advice?", a green button labeled "Submit", and a close icon (X). On the right side of the header are icons for a wrench, a person, and a three-dot menu.
- Step 1:** Marked with a green checkmark icon and the number "1". The text is "Thanks for reaching out. What's your message about?". Below this is a subtext: "Think of this like the subject field in an email. But already filled in for you." followed by a bulleted list:
  - I want to know more about you
  - I have some feedback for you
  - I'm looking for some advice
  - I'd just like to chat
- Step 2:** Marked with a red speech bubble icon and the number "2". The text is "Great. What would you like to ask or tell us?".
- Step 3:** Marked with an orange speech bubble icon and the number "3". The text is "Thanks. Now let's grab your contact details so we can get back to you. First off, what's your name?".
- Step 4:** Marked with a green phone icon and the number "4". The text is "Your Contact Number?".
- Step 5:** Marked with a blue envelope icon and the number "5". The text is "And finally, could you let me know your email address," followed by an orange button labeled "Thanks. Now let's grab..." and a question mark. Below this is a subtext: "We'll be in touch within the next couple of days with an answer for you."

**Note:** If you have already created some forms in Type-Form, then you only need to create new configurations for them.

## Creating New Configuration:

To create new configuration, click on **“New Configuration”**

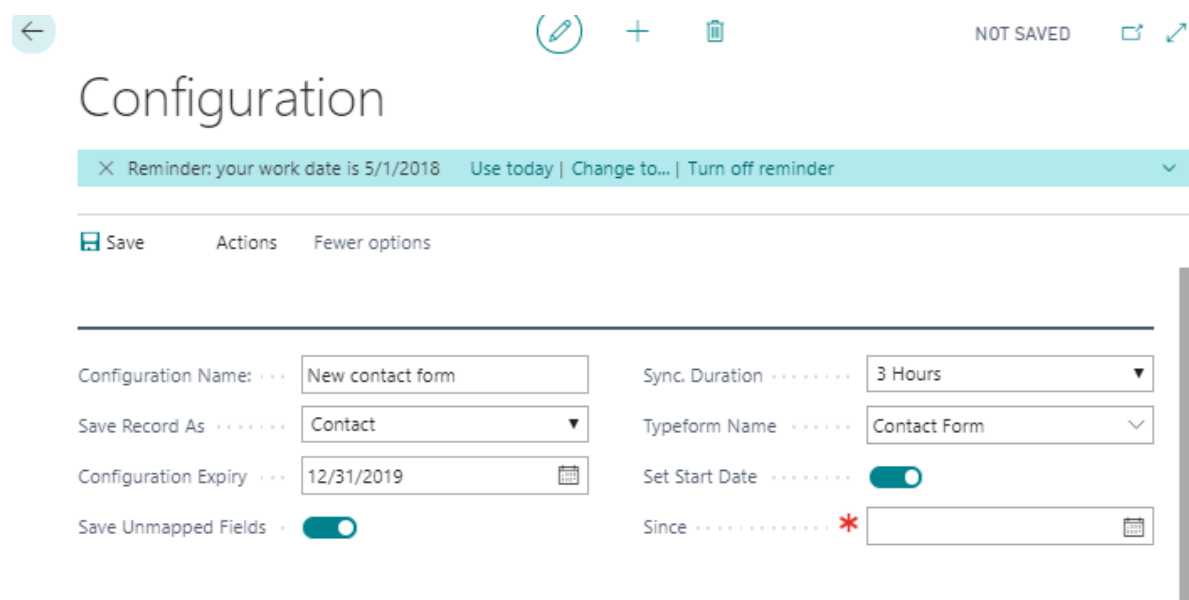
### Activities

#### Registration



After Creating form, you have to configure it once with Scaleable Forms. Fill all the required fields. Check “save unmapped fields” (If you want to save them)

Here we have created configuration of contact form.

A screenshot of the 'Configuration' page. At the top, there's a navigation bar with a back arrow, edit, add, and delete icons, and a 'NOT SAVED' status. Below the title 'Configuration', there's a reminder banner: 'Reminder: your work date is 5/1/2018 Use today | Change to... | Turn off reminder'. Underneath, there's a 'Save' button and 'Actions' and 'Fewer options' links. The main form has two columns of settings. Left column: 'Configuration Name' (New contact form), 'Save Record As' (Contact), 'Configuration Expiry' (12/31/2019), and 'Save Unmapped Fields' (checked). Right column: 'Sync. Duration' (3 Hours), 'Typeform Name' (Contact Form), 'Set Start Date' (checked), and 'Since' (empty field with a red asterisk and calendar icon).

### Sync Duration:

Sync duration of every configuration can be specified. Synchronization will take place after 3 or 6 hrs., as specified by user.

### Configuration Expiry:

You have to select the expiry date for each configuration. After your configuration has expired you will no longer receive the responses for that configuration.

Set Start date (Fetch Previous Responses):

If you want to specify a date from which you want to fetch responses, enable “Set Start Date” and specify the date in “Since” field. Otherwise all previous responses will be synced in Business central.

Mapping Typeform Question with Scaleable Forms entities

After completing your configuration, now you must map the form questions with Scaleable Forms entities. For example, you have created questions as Name, First Name, Contact, Email Address etc. in Type-Form. Now, they are required to be mapped as shown below

Save | Actions | Fewer options

### Field Mappings

Name	×	×
	× Thanks. Now let's grab your contact details so we can get back to you. First off, what's your name?	
E-Mail		×
	And finally, could you let me know your email address, -----?	
Company Name		×
	Select Field...	
Phone No.		×
	Your Contact Number?	
Mobile Phone No.		×
	Your Contact Number?	
Home Page		×
	Select Field...	


After completing the Mapping, click on “Save” on top left of Configuration Card





## Existing Configuration:


In this tile, you will find all your configurations (Created or Draft). The Draft configuration will be displayed as Bold (you must save them first to get responses)


### Registration

  
Registration

  
Typeform PAT

  
New Configuration

  
Existing Configurations

  
Configuration Errors

### EXISTING CONFIGURATIONS

× Reminder: your work date is 5/1/2018 [Use today](#) | [Change to...](#) | [Turn off reminder](#)

View **All** ▾

 Search

 New

Manage

 Refresh

 Responses

 Errors

Page

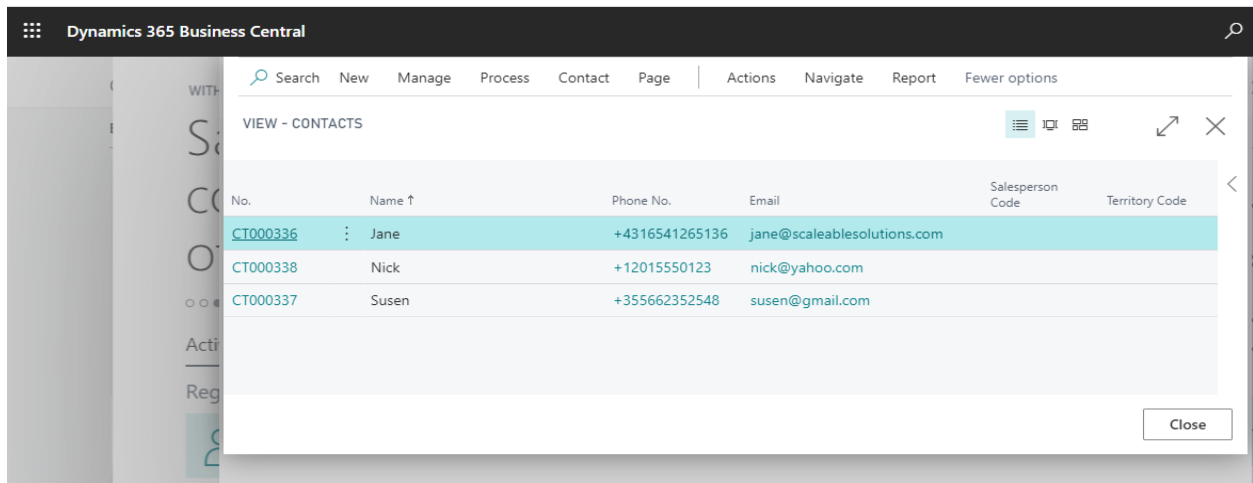
 

Configuration Name	Sav... as Draft	Typeform Name	Save Record As	Sync. Duration	Responses Fetched	Configurat Expiry
<a href="#">other form configuration</a>	<input type="checkbox"/>	Employee Engagement Survey ...	Other Form	3 Hours	0	12/31/20
<a href="#">Employee Survey</a>	<input type="checkbox"/>	Employee Engagement Survey ...	Other Form	3 Hours	0	12/28/20
<a href="#">new contact form</a>	<input type="checkbox"/>	Contact Form (copy)	Contact	3 Hours	0	12/28/20
<a href="#">contact form</a>	<input type="checkbox"/>	Contact Form (copy)	Contact	3 Hours	0	12/28/20
<b>new</b>	<input checked="" type="checkbox"/>	<b>Contact Form (copy)</b>	<b>Contact</b>	<b>3 Hours</b>	<b>0</b>	<b>12/31/20</b>
<a href="#">New Contact Form</a>	<input type="checkbox"/>	Contact Form (copy)	Contact	3 Hours	0	12/31/20
<a href="#">New Contact Form</a>	<input type="checkbox"/>		Contact	3 Hours	0	12/31/20
<a href="#">new TF configuration</a>	<input type="checkbox"/>	New typeform22	Contact	3 Hours	5	12/31/20
<a href="#">New Contact form</a>	<input type="checkbox"/>	Interested in Product form	Contact	3 Hours	9	12/31/20

## View Unmapped Fields

There will be other fields which are not mapped for example you only want to map contact name and email address so all other fields will be considered unmapped fields. You can see all these fields in “unmapped fields “(when viewing your contact)

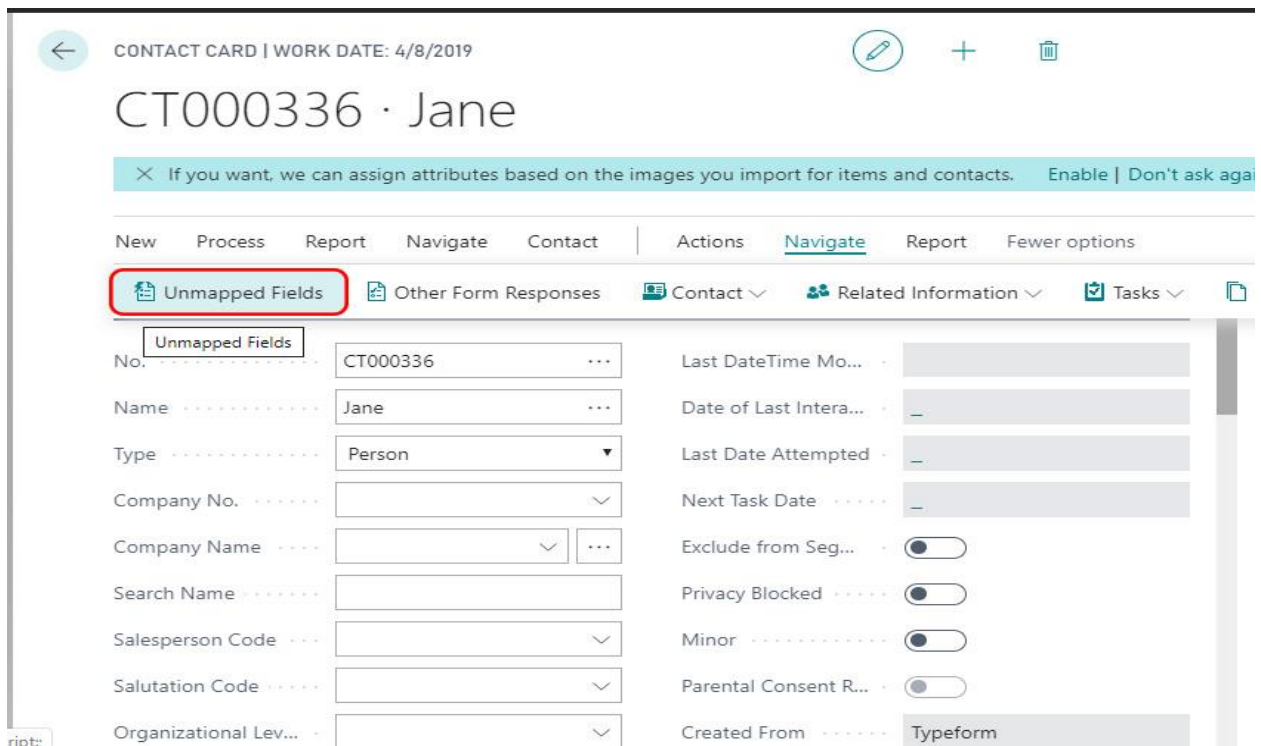
Go to your Contacts, here you can see all contacts created by Scaleable form for the selected configuration. Select any contact.



The screenshot shows the Dynamics 365 Business Central interface. A 'VIEW - CONTACTS' window is open, displaying a table of contacts. The table has columns for No., Name, Phone No., Email, Salesperson Code, and Territory Code. Three contacts are listed: Jane (CT000336), Nick (CT000338), and Susen (CT000337). The 'Close' button is visible at the bottom right of the window.

No.	Name ↑	Phone No.	Email	Salesperson Code	Territory Code
CT000336	Jane	+4316541265136	jane@scaleablesolutions.com		
CT000338	Nick	+12015550123	nick@yahoo.com		
CT000337	Susen	+355662352548	susen@gmail.com		

Click “Navigate” and then click on “Unmapped Fields”



The screenshot shows the 'CONTACT CARD | WORK DATE: 4/8/2019' for contact CT000336 - Jane. The 'Navigate' tab is selected in the top navigation bar. Below the navigation bar, the 'Unmapped Fields' tab is highlighted with a red box. The 'Unmapped Fields' section displays various fields for the contact, including No., Name, Type, Company No., Company Name, Search Name, Salesperson Code, Salutation Code, Organizational Lev..., Last DateTime Mo..., Date of Last Intera..., Last Date Attempted, Next Task Date, Exclude from Seg..., Privacy Blocked, Minor, Parental Consent R..., and Created From. The 'Created From' field is set to 'Typeform'.

CONTACT CARD | WORK DATE: 4/8/2019

CT000336 · Jane

× If you want, we can assign attributes based on the images you import for items and contacts. Enable | Don't ask again

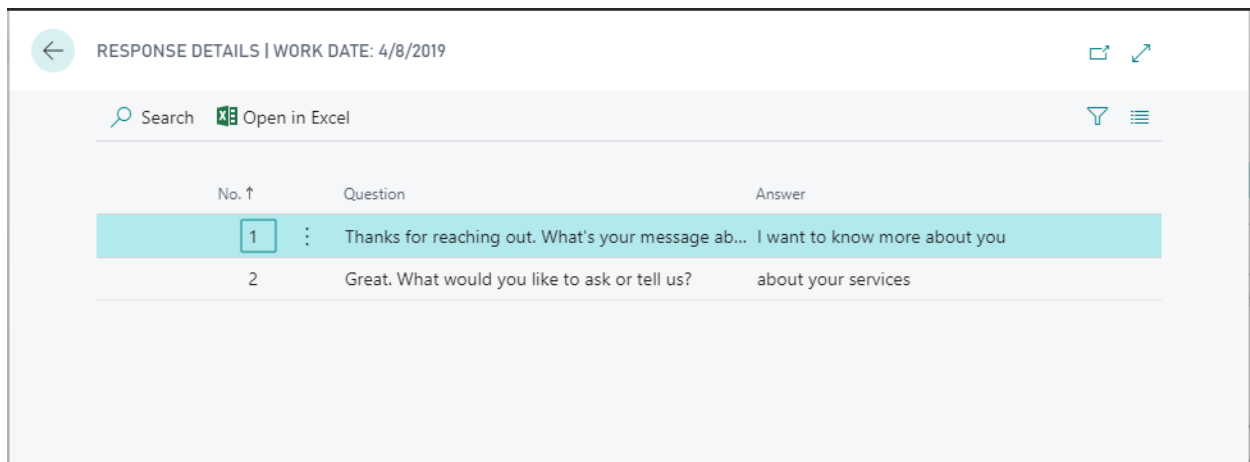
New Process Report Navigate Contact Actions Navigate Report Fewer options

Unmapped Fields Other Form Responses Contact Related Information Tasks

Unmapped Fields

No.	CT000336	Last DateTime Mo...	
Name	Jane	Date of Last Intera...	
Type	Person	Last Date Attempted	
Company No.		Next Task Date	
Company Name		Exclude from Seg...	
Search Name		Privacy Blocked	
Salesperson Code		Minor	
Salutation Code		Parental Consent R...	
Organizational Lev...		Created From	Typeform

Here you will view your unmapped fields.

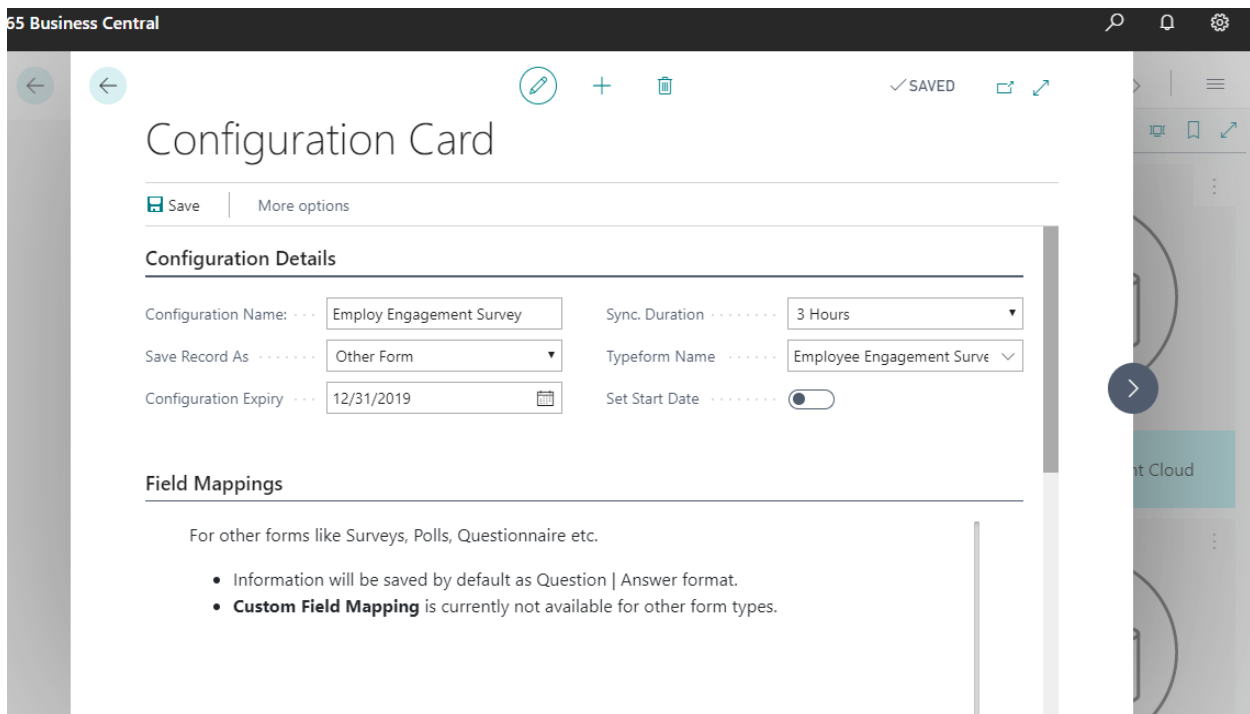


The screenshot shows a web interface titled 'RESPONSE DETAILS | WORK DATE: 4/8/2019'. It includes a search bar and an 'Open in Excel' button. Below is a table with two columns: 'Question' and 'Answer'. The first row is highlighted in light blue.

No. ↑	Question	Answer
1	Thanks for reaching out. What's your message ab...	I want to know more about you
2	Great. What would you like to ask or tell us?	about your services

Creating “other form” configuration:

Creating other form configuration is same as we had created contact form configuration the only difference is that there is no need to map the fields. As whole form is going to save in Scaleable forms.



The screenshot shows the 'Configuration Card' for 'Employ Engagement Survey'. It includes a 'Save' button and a 'More options' link. The 'Configuration Details' section contains fields for 'Configuration Name', 'Sync. Duration', 'Save Record As', 'Typeform Name', 'Configuration Expiry', and 'Set Start Date'. The 'Field Mappings' section contains a note and a list of items.

65 Business Central

Configuration Card

Save | More options

**Configuration Details**

Configuration Name: Employ Engagement Survey Sync. Duration: 3 Hours

Save Record As: Other Form Typeform Name: Employee Engagement Surve

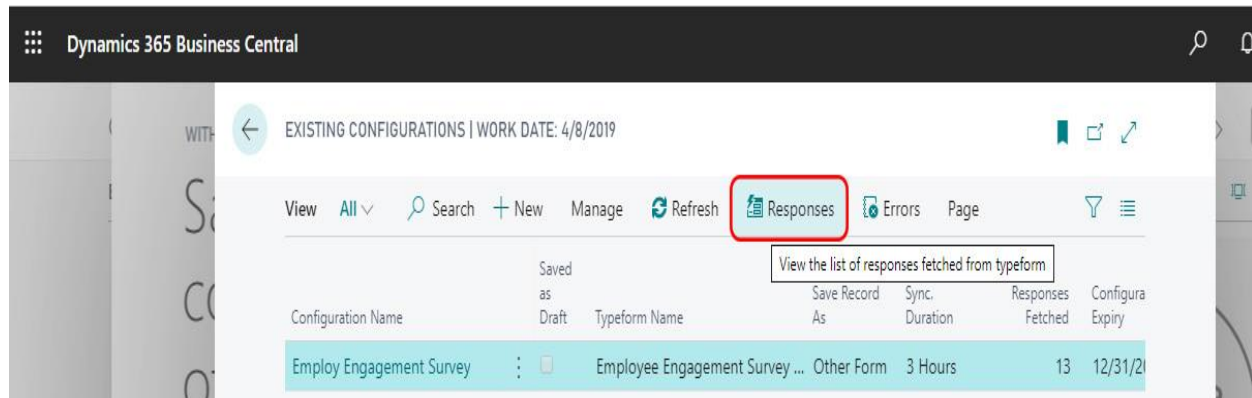
Configuration Expiry: 12/31/2019 Set Start Date: [Toggle]

**Field Mappings**

For other forms like Surveys, Polls, Questionnaire etc.

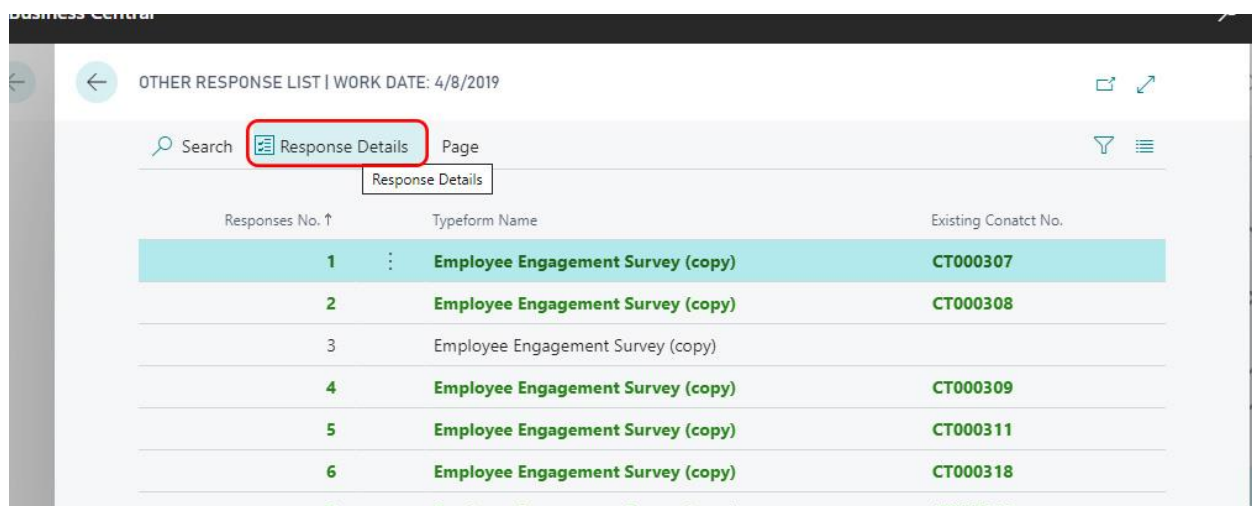
- Information will be saved by default as Question | Answer format.
- Custom Field Mapping** is currently not available for other form types.

Go to your existing configurations. Click on **“Responses”** to view all responses against this configuration.

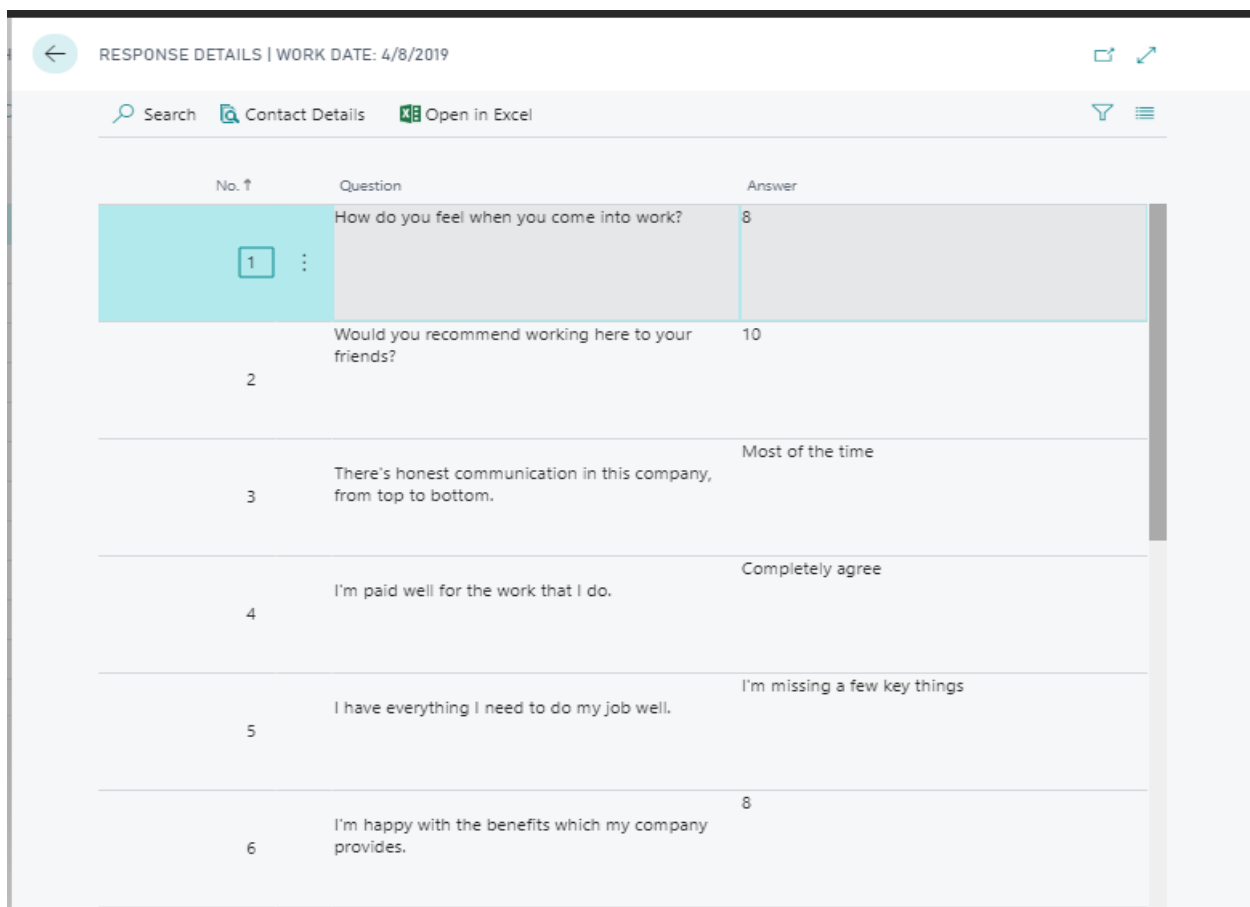


**Green color** shows that the form is filled by your existing contact.

**Note:** The records are filtered by the email address provided in the response.



Click on **“Response details”** to view each response details.



No. ↑	Question	Answer
1	How do you feel when you come into work?	8
2	Would you recommend working here to your friends?	10
3	There's honest communication in this company, from top to bottom.	Most of the time
4	I'm paid well for the work that I do.	Completely agree
5	I have everything I need to do my job well.	I'm missing a few key things
6	I'm happy with the benefits which my company provides.	8

**Note:** In this version we are not mapping attachments and pictures.

## Configuration Error:

To view errors in any configuration, click on **“Configuration Errors”**

### Activities

#### Registration



Registration



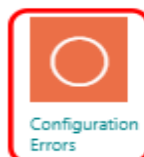
Typeform PAT



New Configuration



Existing Configurations



Configuration Errors

All the configuration having error will be displayed. Select any configuration and click on **“Errors”** to view details

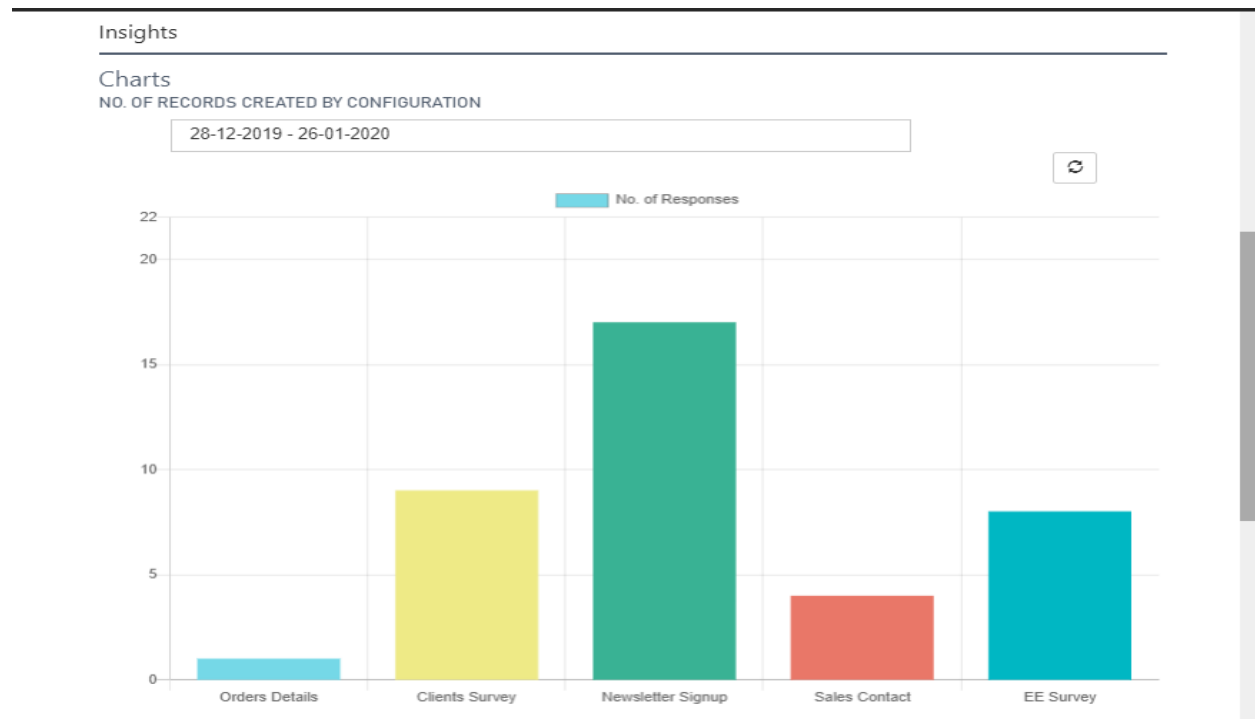
Configuration Name	Typeform Name	Save Record As	Sync. Duration	Responses Fetched	Configurati... Expiry	Coi Cre
Lead Genertion form	Lead Form	Contact	3 Hours	12	12/31/2019	12

Configuration Name	Response ID	Error Description	Created On
Lead Generation fo...	"gi2m6e1eg5hm8gi2mpavtceuulda903"	Cannot write the value 04/04/0044 12:00 AM ...	12/27/2019 5:09 PM
Lead Generation fo...	"gigp9s3uke1ad975296gigp9s3rpo8g7"	The value "0000-09-09 00:00:00" can't be eval...	12/27/2019 5:09 PM
Lead Generation fo...	"bf3pw35i7exghqbf367td4anrrzgq2ux"	Cannot write the value 11/11/1111 12:00 AM ...	12/27/2019 5:09 PM
Lead Generation fo...	"b8ubxdui83aw2t83luifb8ubxd2x0578"	Cannot write the value 03/31/0001 12:00 AM ...	12/27/2019 5:09 PM
Lead Generation fo...	"1jsmku2yaoj27qq4hn1jsmku2c8sd04g"	Cannot write the value 04/05/0006 12:00 AM ...	12/27/2019 5:09 PM

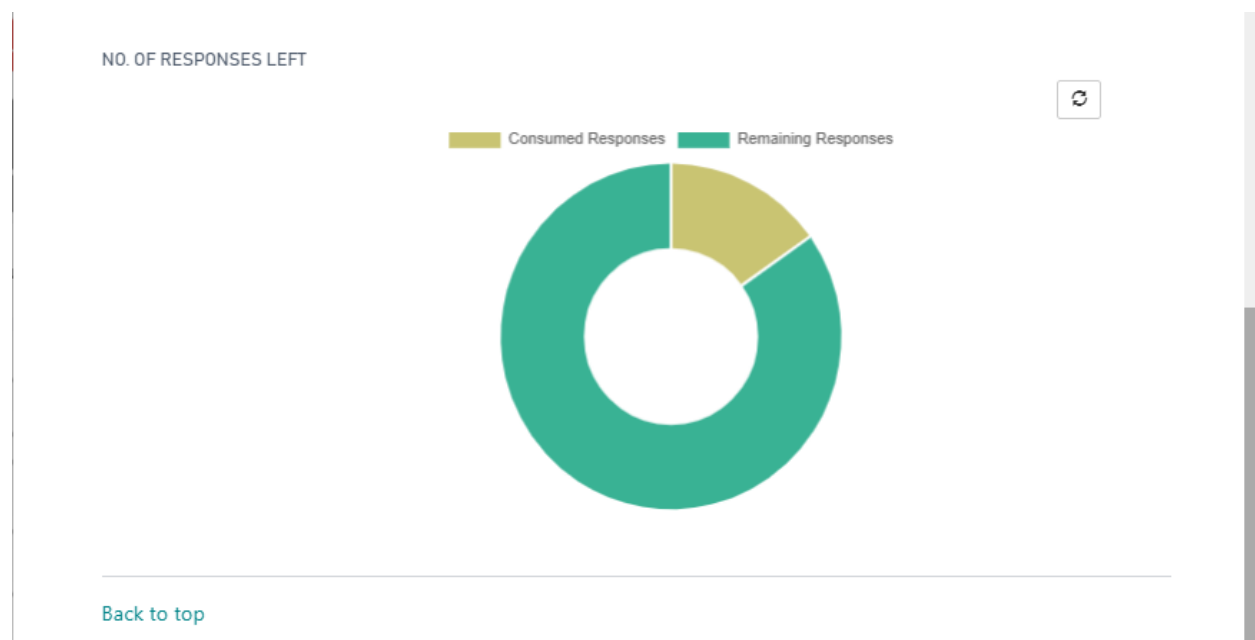
**Note:** Fields containing error will not be saved.

## Dashboard:

**No. of Records Created by Configuration** will display the total number of records created by each configuration.

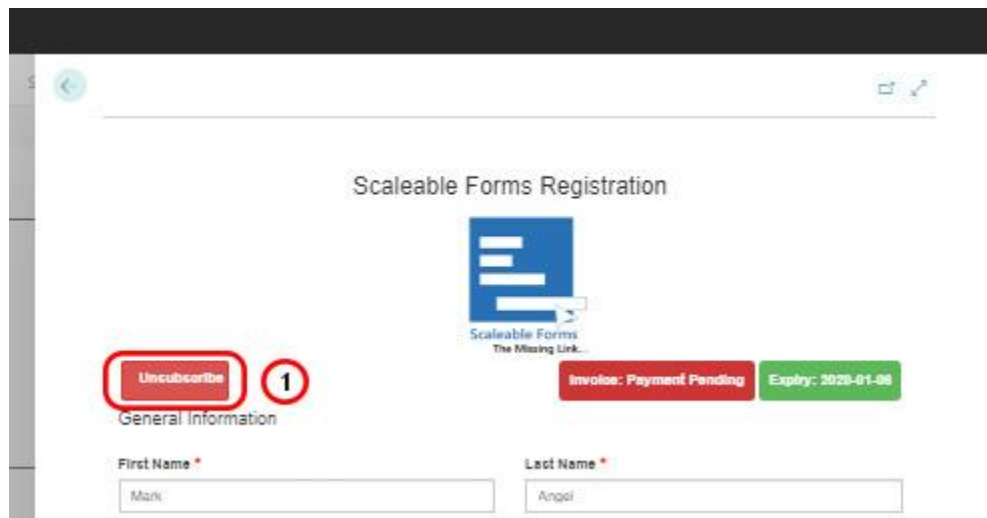


**No. of Responses Left** will be a progress doughnut chart, it will display the total number of responses left in the package.



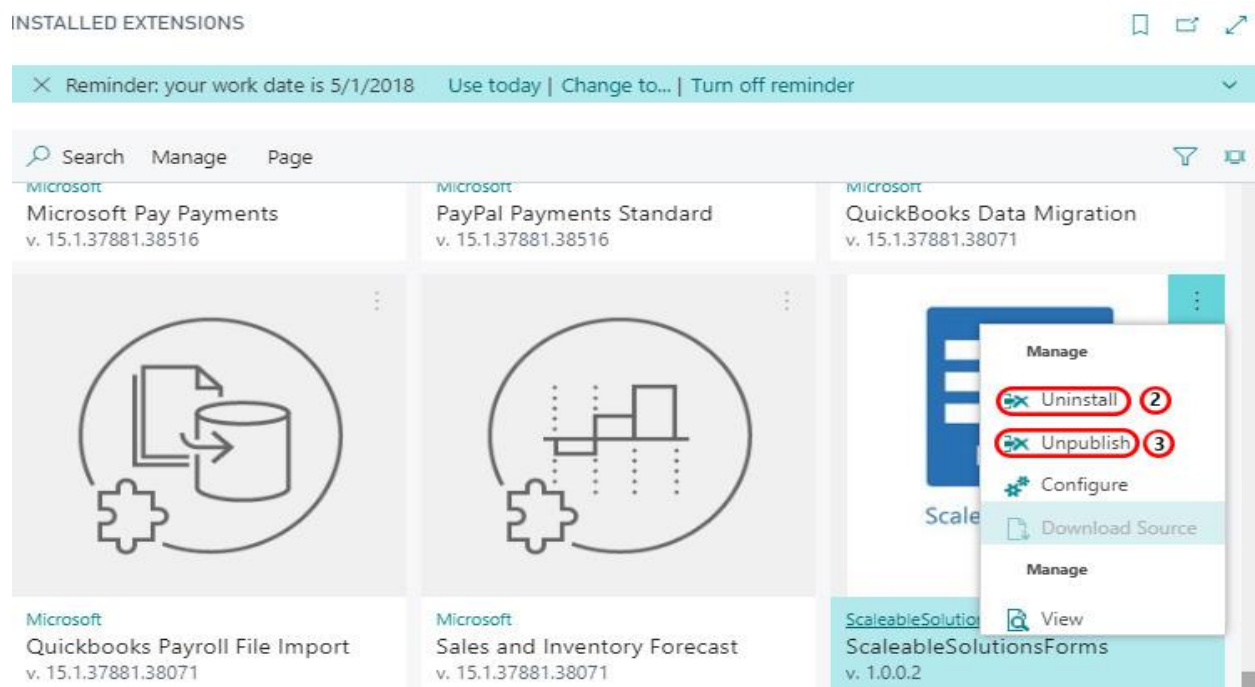
## Unsubscribe and Uninstalling the Solution:

First Unsubscribe Saleable Forms. As it may affect the performance of the tenant.



Then uninstall and unpublish Scaleable Forms extension.

Go to the **Managed Extension**. First **Uninstall** and then **Unpublish** the extension.



**Note:** If the extension (Scaleable Forms) is not unsubscribed then you will continuously receive the invoice according to your selected package. So, it's better to unsubscribe the extension first to avoid this situation.