

# Wizards

## **READ ME**

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# What is a Wizard?

A Wizard helps you divide a long form into a series of screens, where users can enter data on each screen as they proceed to the next step until completion. A step-wise approach is less overwhelming and reduces chances of erroneous data entry, as the partially completed form can be saved as draft and submitted later.

Wizards are typically helpful when:

- you want users to complete the form only in a systematic sequence
- there are several steps involved in accomplishing something
- you want users to be able to save the form as a draft before submitting

## Feature availability

Users with **Manage Customization** profile permission can create wizards, screens, and buttons and **Manage Automation** permission for creating actions in a button.

**Enterprise:** Total 5 wizards/org (2 wizards/module)

**Ultimate:** Total 25 wizards/org (5 wizards/module)

## Recommended use cases

Displaying different sections of a record such as user details, employment history, educational qualification, insurance details etc., in single view can cause confusion. Instead, showing each section as separate buttons in the home screen will allow the reps or agents to navigate between the sections easily based on the customer's interest.

This approach can be helpful in processes where the application forms are extensive and the user wish to skip a few details at the moment like loan application, property selection, visa submission etc.

**Insurance form:** A simple, interactive form for purchasing insurance makes filling forms much easier and smoother.

The image displays three overlapping screenshots of a web-based insurance form:

- Top Screenshot (Home Screen):** Titled "Create Lead" with a "Standard" dropdown and "Home Screen" label. It includes "Applicant Details" and a "Fill in the following information about the user" section with fields for First Name, Last Name, Street, Country, Email, Phone, and State. A "Cancel" button and a "Save as draft" button are in the top right. A note at the bottom says "Ensure the user has agreed on the communication consent".
- Middle Screenshot (Screen 1):** Titled "Screen 1" under "Car Insurance Details". It asks for "Enter the following details about the vehicle" and includes fields for Vehicle Type, Make, Purchased on (MM/DD/YYYY), Type, and "Do you have car insurance now?". A "Submit" button is at the bottom right. A navigation bar with "Car Insurance", "Health Insurance", and "Personal Insurance" buttons is visible to the right.
- Bottom Screenshot (Screen 2):** Titled "Screen 2" under "Health Insurance". It asks for "Enter the following details" and includes fields for "Period of insurance", "Insured amount" (USD), "Insurance type", "Previous medical history", and "Do you have any health insurance now?". A "Health History" button is at the bottom right.

**University admission form:** The application form for admission to university is much comprehensible and clutter free with the help of a wizard. Separate screens are used to capture additional details like projects, presentations etc. which reduces the chances of overlooking important details during form submission.

The image displays three sequential screens of a university admission form wizard:

- Screen 1: Home Screen** - Contains fields for Student's Name, Contact number, Email, Correspondence details, Date of birth (MM/DD/YYYY), Gender (-None-), and Age proofs (Choose file).
- Screen 2: Academic Details** - Contains fields for Select the university (-None-), Year of graduation, and Specialized training in. Includes buttons for 'List of courses taken' and 'Payment details'.
- Screen 3: Education Details** - Contains fields for University name, Degree, and Enter the courses. Includes a section for 'List of courses taken' and buttons for 'Projects', 'Presentations', 'Abstracts', 'Thesis', 'Research projects', and 'Internship'.

**Product purchase form:** Single product order form is divided into different sections, the agents can pull the form that they need to fill based on customers' interest.

The image displays three sequential screens of a product purchase form wizard:

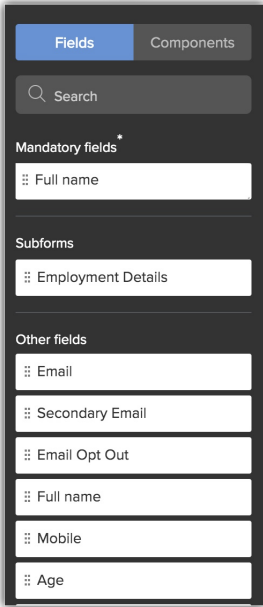
- Screen 1: Create Order** - Contains fields for Requester Details (Enter buyer details: First Name, Last Name, Street, Country, Email, Phone, State) and Product Selection (Specify the product that are ordered: Type of stationery items, Product type, Select the number of products, Enter the display message, Company Name, Specify the gift wrapping style, Date and Time of delivery, Order placed on).
- Screen 2: Personalized Gifts** - Contains fields for Product type, Choose the number of products, Enter your message, Choose delivery date (MM/DD/YYYY), and Gift wrapping?.
- Screen 3: Corporate Stationery** - Contains fields for Gift wrapping?, Product type, Select the number of products, Enter the display message, Company Name, First Name, Date and Time of delivery, and Order placed on.

# Creating a Wizard

In Zoho CRM, you can customize the record detail page using wizards, to segment a single form into several concise segments. Each section will appear as a screen and the user can navigate across the screens using buttons such as next, save, more etc. You can create wizards in both standard and custom modules and also across different layouts (you can add upto 4 layouts).

You can select the fields that should appear in each section and use different formatting options to design a unique form (wizard) to suit your business requirement. A wizard consists of following elements:

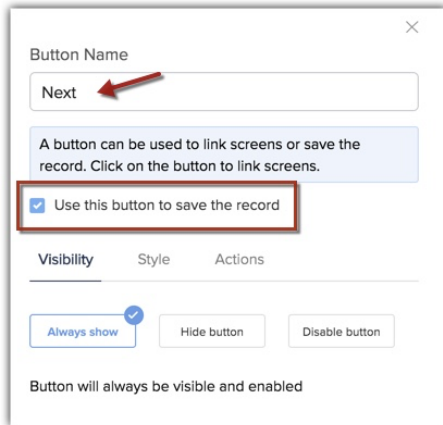
**Fields:** All the fields, sections, and subforms that you have added to the layout will be displayed under the Fields tab. You can drag and drop the desired fields into each segment. *Note that, you cannot create a field from this screen.*



**Components:** Currently, we are supporting a single line component. You can add up to 5 components in a screen.

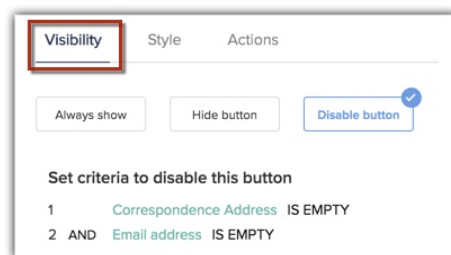


**Buttons:** Buttons can be used to save a record or to link different screens. In a single screen you can add up to 10 buttons. You can use only one button to link a screen. Depending on the action that you want these buttons to perform, you can name them: **Save, Next, Edit, Product name** etc. You can specify if a button should be used to save a record by checking the **Use this button to save the record** option. For example, you can check this option to ensure that the record is saved when the **Done, Submit** or **Save** button is clicked by the user.

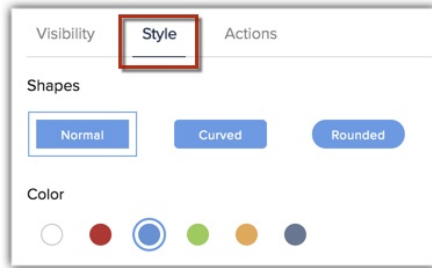


For each button you can define the visibility, style, and actions.

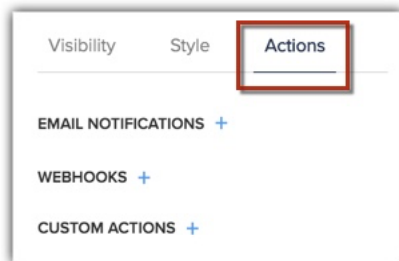
- **Visibility:** You can set the visibility of the button to: always show, hide button or disable button. Also, you can set conditions when the button should be hidden or disabled, for example, if the correspondence address and email address fields are empty the Next button should be disabled/hidden.



- **Style** - You can select the shape of the button as normal, rounded or curved and choose a color from the available options.

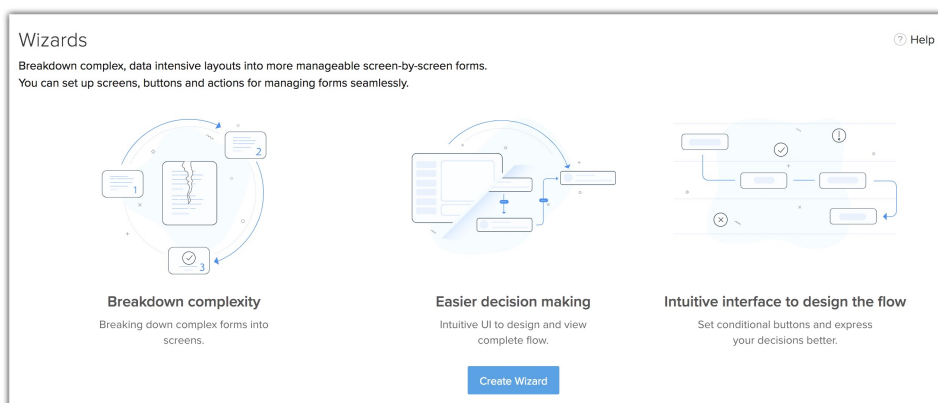


- **Actions** - You can set actions like sending email notifications to the record owner whenever the Submit button is clicked. You can also set actions using webhooks or write your own custom actions. For example, you can write a webhook to notify the students when their application form is submitted to the university portal.



## To create a wizard

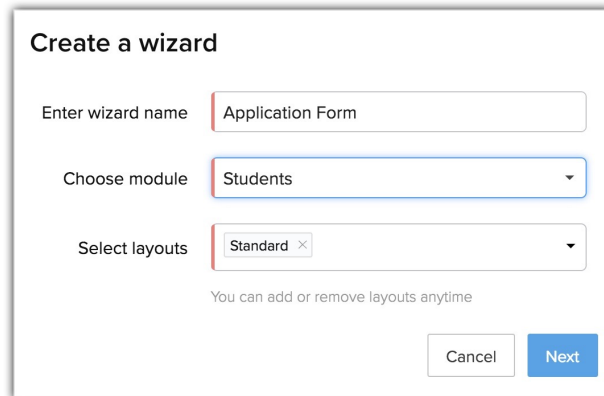
1. Go to **Setup > Customization > Wizards**.
2. Click **Create Wizard**.



3. In *Create a Wizard* page, enter the **Wizard Name**, select a **Module** from the drop-down list and choose the **Layouts**.



4. Click **Next**.



**Create a wizard**

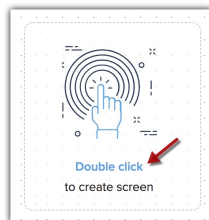
Enter wizard name

Choose module

Select layouts

You can add or remove layouts anytime

5. In the *Design* page, **Double click to create a screen**.  
You will be redirected to the wizard design page.



6. In the wizard designing page, do the following:

- Enter the **Screen Name**.
- Enter the **Segment Title**.
- In the *Fields* tab, drag and drop the required fields into the segment.
- Click the *Components* tab and drag and drop the **Text Component**.  
Type your content.
- Click **Button** and enter a name.
- Check Use this button to save the record, if needed.
- In the *Visibility* tab, select **Always show**, **Hide** or **Disable** button.  
Click **Set Criteria** to define conditions for the Hide/Disable functions.
- In *Style and Actions* tab, select a desired option.
- Click **Done**.

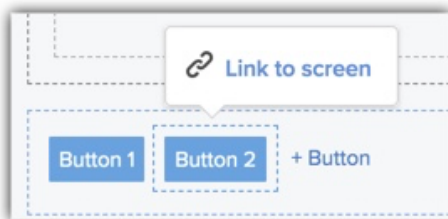
You will be directed to the main design page, where you can add further

screens.

The screenshot shows the 'Student Information' wizard design page. On the left, there is a sidebar with 'Fields' and 'Components' tabs. Under 'Fields', there are sections for 'Mandatory fields' (Full Name), 'Subforms' (Employment Details), and 'Other fields' (Email, Course type, Father's name, Mother's name). The main area is titled 'Student Information' and contains a 'Basic Details' section with several input fields: Full name (Single Line), Age (Number), Residential address (Multi-Line), Correspondence Ad... (Multi-Line), Mobile (Phone), Alternate contact nu... (Phone), and Email address (Email). At the bottom of the main area, there are buttons for 'Next + Button', 'Cancel', and 'Save as Draft'.

7. In the wizard design page, drag and drop the cursor from the button(s) to add another screens.

Alternately, you can click **Link to screen** option over the button.



8. Follow step 6 onwards to add fields and buttons on the subsequent screens.
9. Click **Save Wizard**.

## Manage Wizard Permission

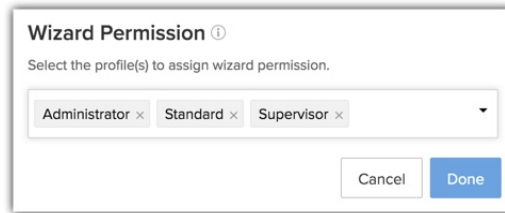
You can select the profiles that should have access to a particular wizard. However, note that the layout permission will override the wizard access permission. That is, if the sales reps have restricted access to layout A, then even though they have permission to access the wizard, they will be unable to view the layout. Therefore, you must make sure the profiles that you give access to wizards have layout permissions enabled.

### To manage wizard permission

1. Click **Manage Permission** from the top panel in the wizard design page.

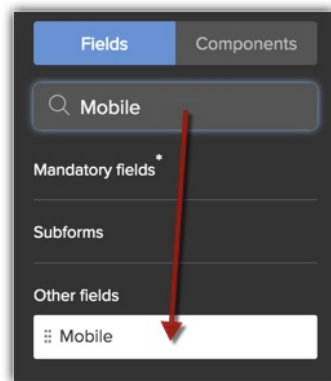
2. Choose the **Profiles** and click **Done**.

You can edit the permissions by adding/removing profiles after setting up the wizard.

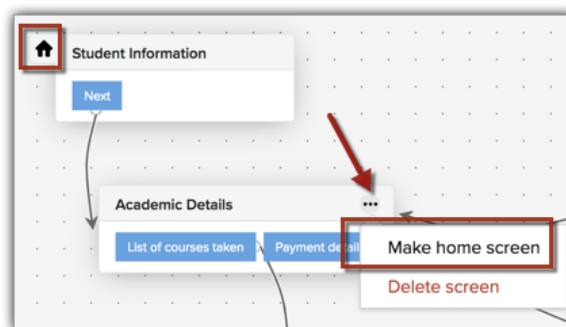


## Points to remember

- Type the name of the field in the search box to find a field quickly.



- By default the first screen will be considered as the home screen (a home icon will be added to the screen). However, you can click the more icon in any screen and make that as the home screen. You can also delete a screen from here.



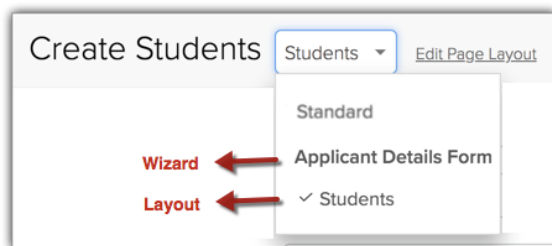
- To avoid getting errors while saving a wizard, be sure to do the following:
- We have listed out all the mandatory fields: system defined and user defined mandatory fields, separately under the **Fields** tab for easy

identification. Make sure you add these fields to the screens before saving the wizard.

- Assure that you don't have orphaned screens or buttons. That is, all the screens must be connected to the buttons (unless the button is used to save the record) and vice versa.
- You have added a button that is meant to save the record.
- Click **Discard Changes** to remove all the configurations that you have made and start designing afresh.

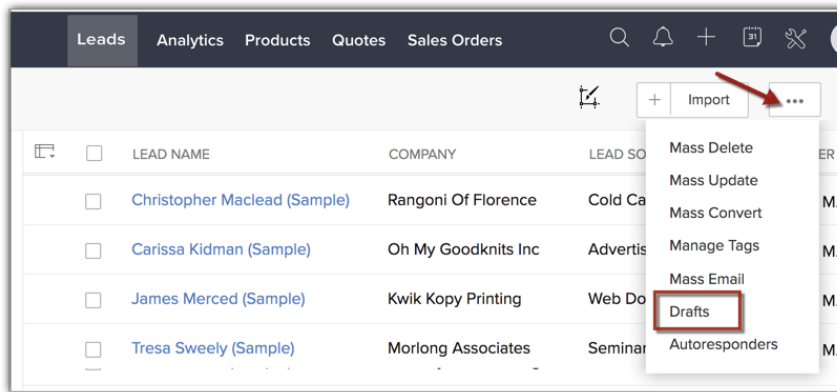
## Creating records in Wizard

The CRM users who have permission to access the wizard and also have permission to access the particular layout can add a record using the wizard. The user must select the desired wizard layout from the drop-down list within the module and add the record's details, the buttons will guide them to navigate through the entire form.

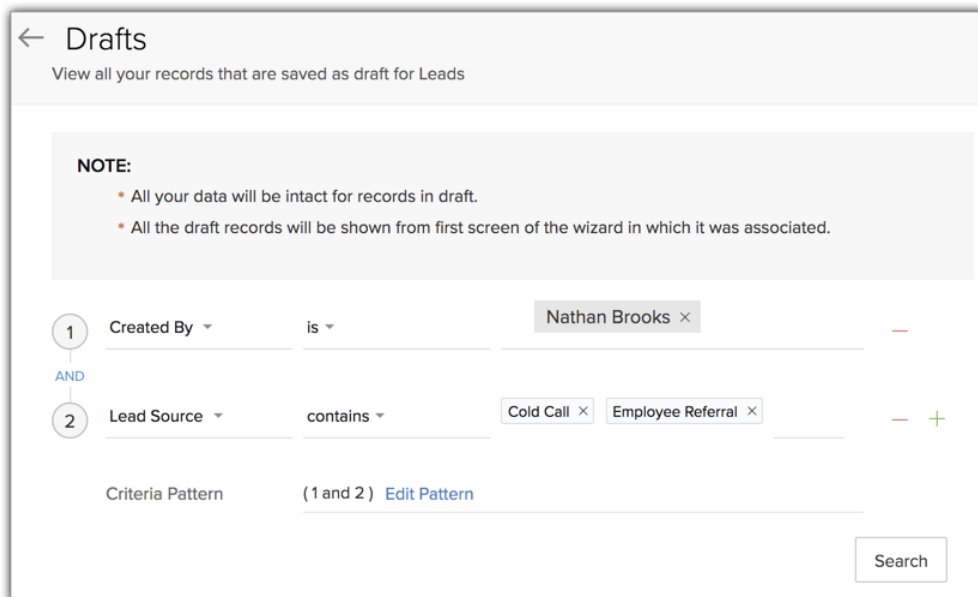


## Saving the record as a draft

You can save a record whose details are partially filled as a draft and enter the remaining details later. These forms can be accessed by clicking on the **Drafts** option from the *More* icon in the module list view. Once the record is saved it will be removed from the drafts and added to the list view.



You can use the criteria to filter drafts from the list of drafts.



Note that, a draft will also be saved when an action like email notification, webhook or custom function is configured in a screen for a button. For example, if an email notification is configured for the a button, then the screen on which the

button was added will be saved as a draft for your reference. The draft record will also be available under audit log.

## Deleting or deactivating a wizard

You can delete or deactivate a wizard that is not in use. However, remember the following points before you choose to deactivate or delete:

- Deleting a wizard will remove the configuration and any draft records that are associated with it. Also, this operation cannot be reverted.
- Deactivating a wizard will remove all the draft records that are associated with it. You can activate a wizard when required.

## List of error messages

While creating a wizard you will come across the following error messages:

- Orphan screens: If the screen is not connected with another screen.
- Save button not valid: If the save button in a screen is set before adding all the system mandatory fields.
- Invalid buttons: If the button is not configured to the save action or not linked to another screen before you save the wizard.
- No option to save: If a screen doesn't have a save button.
- Looping: If the buttons are connected in a way that the action starts and ends on the same screen. In other words, the start and end actions cannot be on the same screen.
- Save button missing: If save button is not configured before saving the wizard.
- Empty wizard: If screens are not added to the wizard.
- Duplicate name: If the entered wizard name already exists.
- Mandatory Fields missing: The screen does not contain all the mandatory fields
- Button has no save or transition: Invalid screen setup. No save button or path found.



