

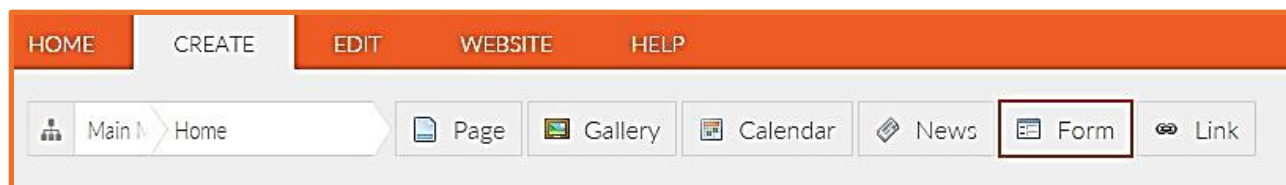
Creating a form in your Content Management System (CMS)

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Creating a form

To create a form within your website Content Management System (CMS) you will need to select the page under which you would like the form to sit, click **create** on the **orange admin toolbar** and then select the **form** option from the available list.



You will then need to add the fields for your form. You can do this by going to **edit** on the orange toolbar and then selecting the type of **field** you require.

Any new field will be added to the bottom of the form but can be moved into the correct position using drag and drop.

To customise a field, left click into the relevant field box to reveal the settings panel which will slide out from the right.

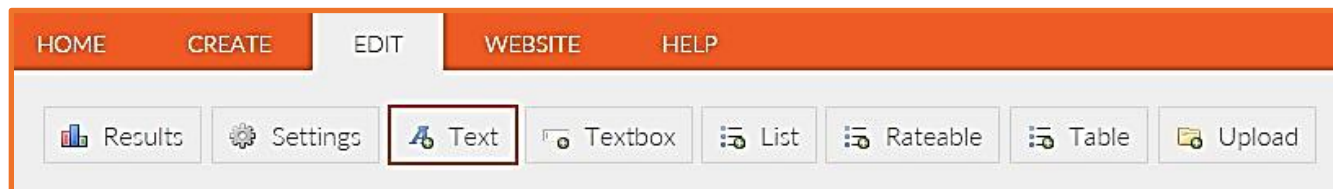
Your form can be saved at any point during the process by clicking **save now** (or **save draft**) within the edit options.

Please note choosing 'save now' will publish the form live onto your website.

Adding form questions

Once you have created your form, you will see there are a number of field types to choose from under the **edit** option.

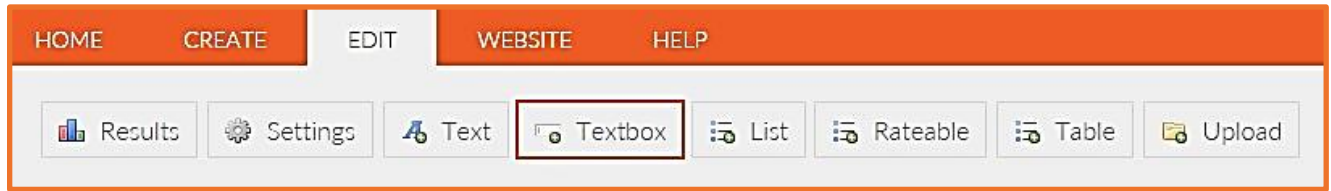
Text Field



The text category can either be used for a heading or a paragraph of text.

To use it as a bold heading, click **true** on the heading dropdown within the panel on the right, or to have a standard block of text, for example a description or introduction message, click **false**.

Textbox Field



Textboxes are the most used type of form field and are ideal for collecting data such as name, address, postcode, email address and so forth.

The default text is set at '**Please enter**' but this can be modified in the settings panel on the right-hand side under **user prompt**.

You can use the **type of textbox** option to specify if your textbox should appear as a **single line** or **multiline** box. Single line is good for information such as a name or email, whereas a full address or dietary requirements may require a larger space to type, therefore the multiline option will be more beneficial.

The **default text** option can be used to specify the default response. If you think a response may be longer than the allocated space given, you can also make the **width of the box** larger by typing in the required character length.

The 'Field Settings' panel includes the following options:

- Type of text box: Single Line (dropdown menu)
- User Prompt: Your Name: (text input)
- Default text: (text input)
- Class: (text input)
- Field Size: (text input)
- Width of the text box (in characters): 30 (text input)

Validation can be used to make question mandatory by selecting **true** from the **requires an answer** dropdown menu. If this option has been selected, an asterisk (*) will appear next to the question and the form will not be able to be submitted until this box is completed.

Selecting a **validation type** will ensure that the response meets the chosen criteria. This means that, for example, if you choose **email address** from the dropdown list then any response given must be in the expected email format e.g. name@domain.com. You can also apply similar validation rules for **UK Phone Number** and **UK Postcode** options.

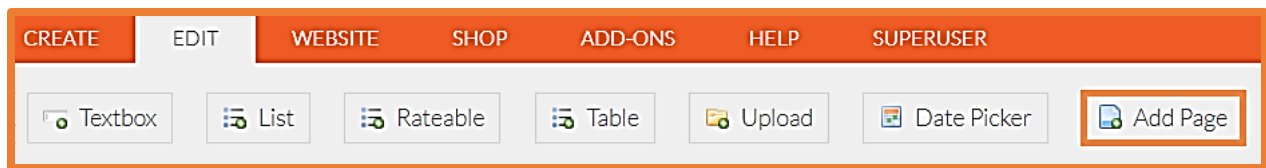
The 'Field Validation' panel includes the following options:

- Requires an answer: No (dropdown menu)
- Validation Type: No Validation (dropdown menu with other options: Numeric, Currency, Email Address, UK Postcode)
- Must contain a specified value: No (dropdown menu)

If you have a form that you only want certain individuals to complete, you can apply a keyword or passphrase onto a form field through the **must contain a specified value** option. The user will be unable to submit the form until they have entered the correct value into the field. You can determine what this value is under the **required value** setting.

Finally, you can assist the user in completing the form by adding a **user tip / instruction** to a field. This will add a question mark (?) next to the relevant field which the user can hover over to reveal a pop-up instruction.

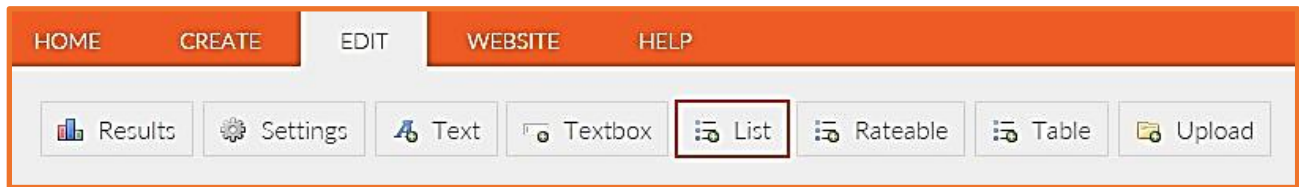
Add Pages



This option is particularly useful if you have a long form, that you would like to break up into sections. Simply click on **Add Page** and a page break will be added to the end of the form. If you would like to move it, just drag it to the position you would like it in.

When the end user completes the form, they will need to click next to move on to the next question.

List Field



Lists are brilliant for obtaining a range of data, asking 'either/or' questions and collecting survey responses.

You will be able to choose the **type of list** you require depending on the number of choices you wish to allow for selection. If you would like the user to only select one option, then you will need to choose either **radio button** or **dropdown**. If they can select multiple answers then choose **list** or **checkboxes**.

As with the other fields, you can choose to rename the **user prompt**, add a **user tip** or make a question mandatory using the **requires an answer** option.

Lists also require you to add the **option text** which allows you to set the choices available. Within the options you have the ability to **limit** an option to a certain number of submissions or **notify a user by email** when it has been selected.

Limiting submissions is useful if you are using the form to create a booking form for example, for a class trip with limited places, as it means once an option's submission allocation has been filled, it will no longer be available.

The **notification by email** is ideal if you have multiple response options, for example on a booking or enquiry form. If you are asking the user to confirm why they are getting in touch – such as for admissions or absences, you can then notify the relevant user for that department by adding their email in this field.

Field Values

Add Placeholder

Values available in the list

7MN ⚙️ ✖️

Limited to submissions.

Notify by email.

7KT ⚙️ ✖️

Limited to submissions.

Notify by email.

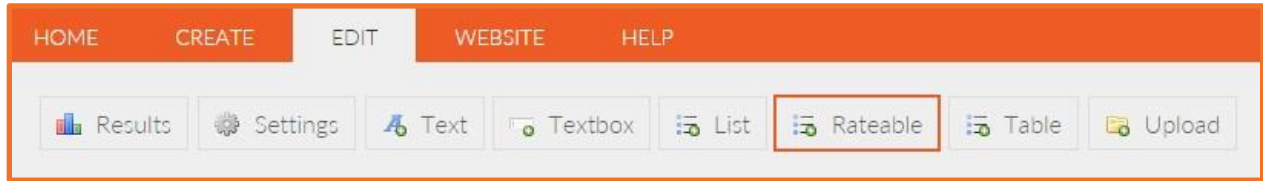
7LS ⚙️ ✖️

Limited to submissions.

Notify by email.

Option Text

Rateable Field



If you are looking to obtain user feedback, this is another useful way of capturing responses.

You can determine the **initial prompt** for the question you wish to ask, as well as the **response headings** which will form the answer options you wish to receive.

You can choose from a selection of predefined rating options or create a custom set of your own. Within these ratings, you can then ask multiple **questions**.

A screenshot of a rateable field form. The prompt is "Please rate the school on the following *". Below the prompt are four categories: Cleanliness, Support, Curriculum Options, and Teaching Methods. Each category has a 6-point rating scale with radio buttons labeled 0, 1, 2, 3, 4, and 5.

For example, if you wish to know how your school is rated from 0 – 5 in terms of cleanliness, support, curriculum options and teaching methods, then you can add each of these options into one question.

As with other fields, you can choose to add a **user tip** or make a question mandatory using the **requires an answer** option.

Date Picker

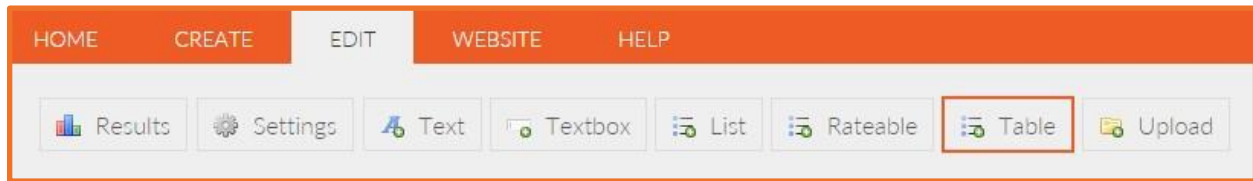


The date picker will add a calendar option to your form, so that that a date can be selected from a calendar, rather than typing it in. Just like with the other fields, you can add a **user prompt** like 'Date of birth' or 'Start date'.

You can also set a **start date** and **end date** to specify the date range that will be available for selection. Plus, you can set the **date format** which will affect the way the date is displayed, and how it can be manually typed into the form.

You can also make the date field mandatory by selecting **requires an answer** and add tooltip instructions using the **user tip / instructions** box.

Table Field



If you are using your form to collect a selection of data such as the employment history on a job application, or the education history on a sixth form admissions form, then a table field is an organised way to capture this data.

You can determine the **initial prompt** for the question as with the rateable field option, and then choose an **input type** to determine if the input boxes should appear as **single line**, **multiline** or **radio buttons**.

Give each column a title within **custom headings** and add additional columns using the **add option** button. Identify each row using the **items to rate** option and again use the **add option** button under this to add additional rows.

As with other field types, you can select whether an answer is required by choosing **true** or **false** on the **requires an answer for each** dropdown. You can also add a **user tip / instruction** tooltip to assist the user with completing the table.

Field Headings

Custom Headings

-
-
-

Text

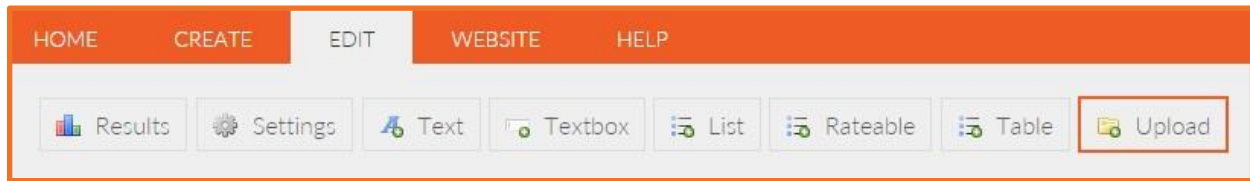
Field Questions

Items to rate

-
-
-

Text

Upload Button Field



This field is only relevant if you require documents to be uploaded with the form submission. It's great for applications, hand-ins, or to share information such as a sick note on an absence form.

You can explain what information you need uploading using the **user prompt** setting and also specify the **max file size** and **allowed file type** to narrow down the types of documents you will receive.

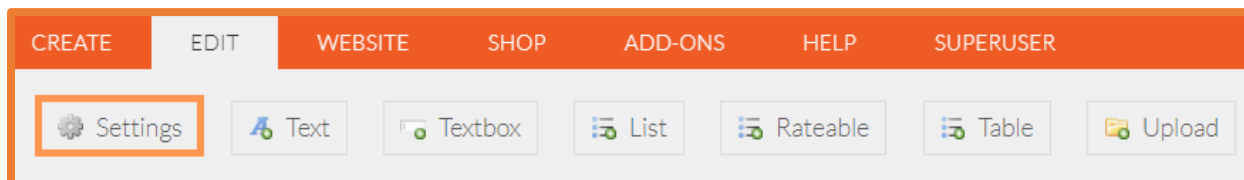
By default, the allowed file types that can be uploaded to the CMS are:

- pdf
- rtf
- txt
- xls
- xlsx
- ppt
- doc
- docx
- pps
- pptx
- png
- jpg
- jpeg
- gif
- mp3
- mp4

Please note if you wish to allow multiple file types to be uploaded, you can select more than one, but they must be separated with a comma and no spaces.

You can also make the upload field mandatory by selecting **requires an answer** and add tooltip instructions using the **user tip / instructions** box.

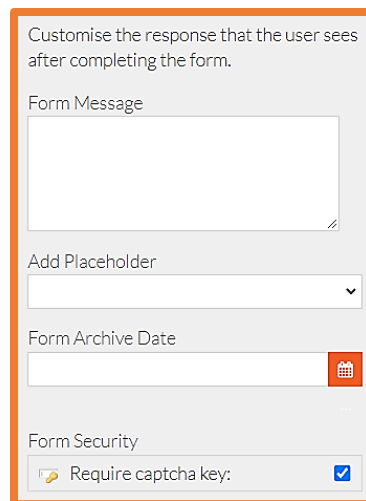
Form Settings



There are a number of settings that you can change to affect the way your form works.

Form Message

When a user completes your form, they will receive a success message which says, 'Thank you for submitting the form'. If you wish to **personalise** this, you can do so here. Type in the **form message** and use the **placeholders** to personalise it with information collected on the form, such as name.



The screenshot shows the 'Form Message' settings panel. It includes a text area for the 'Form Message', a dropdown menu for 'Add Placeholder', a date picker for 'Form Archive Date', and a checkbox for 'Require captcha key' which is checked.

Form Archive Date

This can be used to stop people completing the form after a certain date, so it's great for application forms or online bookings. Just select a **form archive date**.

Form Security

Online bots lookout for forms as a means to send junk messages to websites and email accounts. To prevent this, we recommend that you add a Captcha Key. A Captcha Key is a way of identifying if the person completing the form is in fact a human. Prior to submitting a form, the user is asked to complete a task to identify items in images. The form can only be submitted if this task can be completed.

Form Redirect

Add a link to redirect to another page on completion of the form. You can either type or paste a link, or use select internal link to choose a page on your own website. If linking to an external page, make sure the protocol (e.g. https://) is included at the beginning.

Form Submissions

To ensure that form submissions are not lost, you should make sure that **save to site database** has been selected. If this is not ticked, you may risk losing responses that have been submitted.

You can set the system to automatically **remove submissions** after a set number of days. This will help you to ensure that you are meeting data protection guidelines by not storing data for too long. If you don't set a timescale here, you will need to manually remove the submission via **View Results** (NB this option will only appear if you have live form submissions)

You can set the form to **allow users to print** and **allow users to save**. These are especially useful for longer forms.

Email Settings

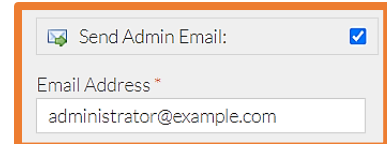
As well as saving submission to the database, you can allow emails to be sent, both to an admin email address, and to the user.

If you tick **Send Admin Email**, you will be prompted to add the admin **Email Address**. If you would like to notify multiple users, enter the email addresses separated by a comma, with no spaces.

If you tick the **Send User Email** option, you will be prompted to choose the **field for user email** and to select whether you would like to **include a copy of the completed form in the email to the user**.

If you enable either of the admin or user email options, you will be prompted to set the **email fields**. Enter an appropriate **Email Subject** and choose whether you would like to **hide empty fields**.

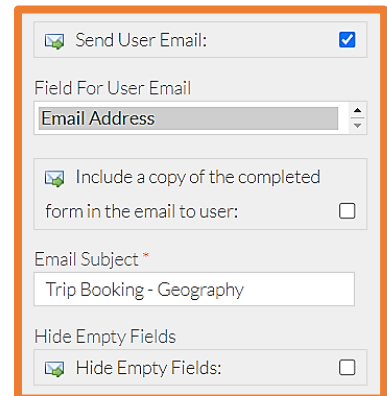
If you wish to personalise the email, you can add an **Email Prefix** and **Email Suffix**. If you have chosen to include the form responses, they will be included in between these sections. You can use placeholders to personalise the message with any information gathered on the form, for example addressing the email by name, or mentioning the pupil that the submission is about.



Send Admin Email:

Email Address *

administrator@example.com



Send User Email:

Field For User Email

Email Address

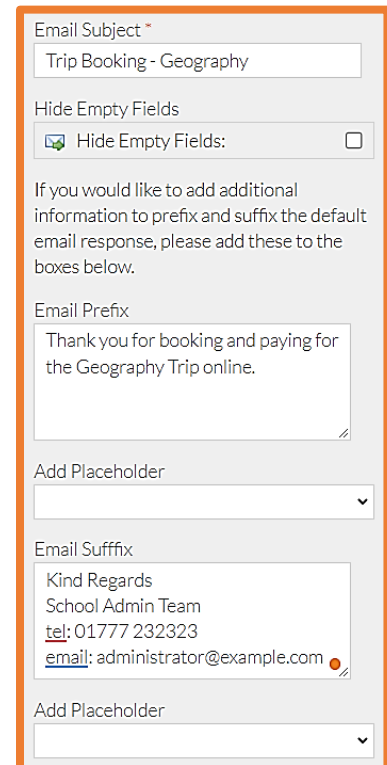
Include a copy of the completed form in the email to user:

Email Subject *

Trip Booking - Geography

Hide Empty Fields

Hide Empty Fields:



Email Subject *

Trip Booking - Geography

Hide Empty Fields

Hide Empty Fields:

If you would like to add additional information to prefix and suffix the default email response, please add these to the boxes below.

Email Prefix

Thank you for booking and paying for the Geography Trip online.

Add Placeholder

Email Suffix

Kind Regards
School Admin Team
tel: 01777 232323
email: administrator@example.com

Add Placeholder

Form Payments

This option is available at an additional cost. Please contact our Support Team if you would like to have this added. Once purchased, you will need to provide us with some details about your payment provider, so that this can be switched on for you.

If the option is available, and you would like to accept payment via your form, tick the checkbox to confirm that **this form requires payment**.

If the payment is a fixed price for every submission, you can simply enter the cost in the **fixed price** field.

If the payment is different depending on an answer to one or more of the fields, select the **Variable Price Fields** (you can select multiple from the list if needed). If you choose the variable option, the price charged will be calculated from the responses made to all the fields selected.

Usually, the email confirmation will be sent to the user when they submit the form, you can change this to **send the email response on payment** instead.

You can allow users to choose to set up a **recurring payment**. This is useful if you would like users to choose to make a regular donation for example. An option will be made available at the top of the form for users to select.

Saving

Your form can be saved at any point during the process by clicking **save now** (or **save draft**) within the **edit** options. **Save now** will publish the form live onto your website.

Form Payment

Please select whether users should be directed to an online payment system after completing the form.

Payment

This form requires payment:

Fixed Price

Variable Price Field(s) (Clear)

Child's Name
Class
Payment Amount

Please select whether any emails should be sent at the point of payment instead of the point of submission.

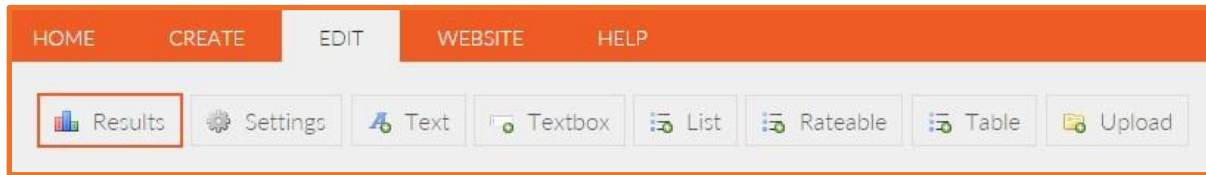
Send email response on payment:

Please select whether the user can opt for payments to recur.

Payments can recur:

Accessing form submissions

Once you begin receiving submissions to your form, assuming you have chosen to save the results to the database, you can access the responses through the website.

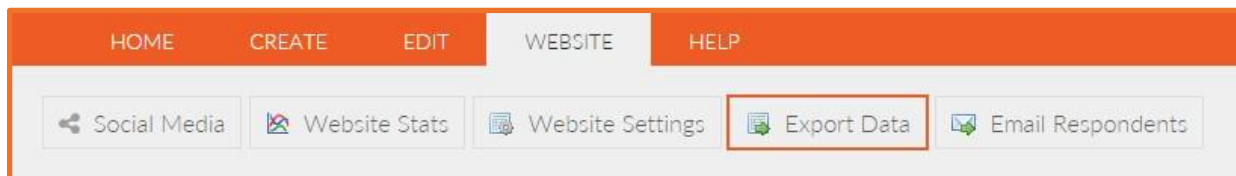


To **view form submissions** from the form, you can go to **edit** and then **results** on the orange admin toolbar.

You will then be able to see a list of form submissions on the page along with the submission ID, date and time submitted. There will be a link against each submission to **view** or **delete** a entries.

If you click **view** you will be able to see the form questions and answers for a specific submission, and if you click **delete** this will permanently remove the submission from the site database. ***You will not be prompted to confirm the deletion.***

You can also **export form submissions** in csv format, which can be opened with most computer spreadsheet software applications



To do this, you will need to go to **website** on the admin bar and then to **Export Data**.

Choose **form submissions** from the pop-up box and **select which form** you would like to download the data for and the **date range you require**.