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Introduction to the Forms Module

The Forms module is a powerful tool to collect information from your users. The data that is collected is automatically stored and easily retrieved in a spreadsheet format. This makes it ideal for uses such as:

- Registrations
- Website feedback
- Sign up forms
- Work requests
- Requests for information

When the user finishes and submits the form, the system automatically checks that required fields are filled in and that dates, phone numbers and email addresses are in the correct format. The form administrator is notified that there is a new form submission – making it easy to manage the data either through e-mail or by downloading a spreadsheet. Unlike other popular form tools, the Forms Module can use SSL encryption to increase the privacy of information as it is being transmitted.

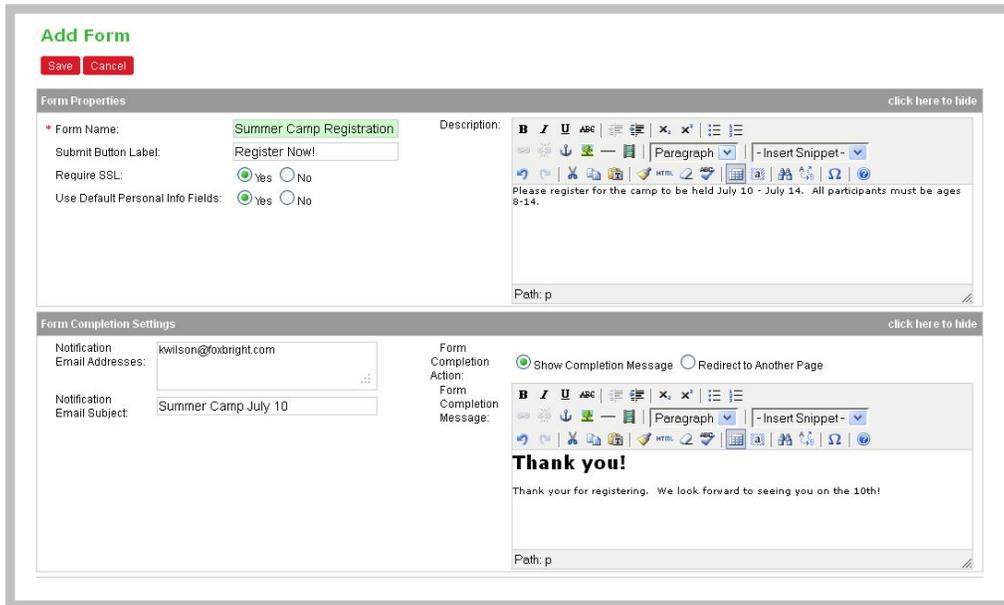
Creating a form

1. Log in to the CMS Control panel by navigating to the following page:
http://[your home page]/admin
2. Click on the **Forms** tab
3. Click on **Add Form**.
4. Type the name of your form into the **Form Name** field.
5. Type the text you would like to appear in the button at the bottom of the form in the **Submit Button Label** field. Often this will be things like “Submit”, “Register” or “Send Response”.

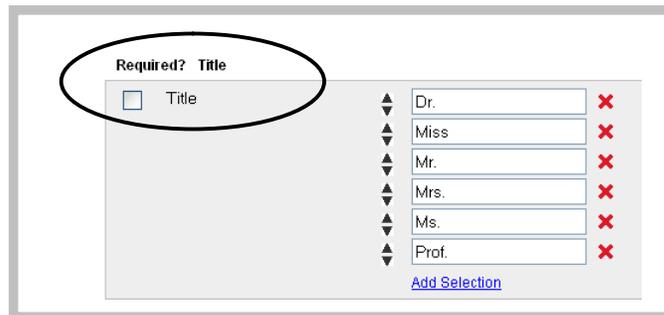


A screenshot of a web form configuration interface. It features two input fields. The first field is labeled '* Form Name:' and contains the text 'Summer Camp Registration'. The second field is labeled 'Submit Button Label:' and contains the text 'Register Now!'. The entire form area is enclosed in a light gray border.

6. Add additional information to any of the following areas to configure your form
 - a. **Require SSL** – Forces the form to use SSL to ensure that the form data is submitted using a secure channel.
 - b. **Use Default Personal Info Fields** – Clicking this can save time. It automatically adds typical personal information fields to your form including name, address and phone details.
 - c. **Description** – A description that will appear at the top of your form. This is visible to the public when your form is displayed.
 - d. **Notification Email Addresses** – The form and the form data will be sent to this e-mail address, or list of comma separated email addresses.
 - e. **Notification Email Subject** – Enter the subject line for the e-mail notification sent to the above email addresses. This can be particularly helpful if you plan to use automatic filtering to sort your notifications in your inbox.
 - f. **Form Completion Action** – Indicates what happens after someone completes the form. They can either see a message or be taken to a particular webpage.
 - g. **Form Completion Description or Form Completion Redirect URL** – This area changes depending on the completion action chosen above.



7. Click on **Save** to create a blank form and enable the form tools to appear.
8. Click on any of the **Tool Box** items to add them to your form. See the [toolbox guide](#) for information on each specific toolbox item.
9. For each of the toolbox items you add, you must specify the **Title** of the field. You can also specify the **Help Text** which will appear as a help bubble to the side of the field.
10. To reorder any of your fields, hold your mouse over any blank part of the field, click and drag the field to the desired location.
11. Click the **Required** checkbox for any field that must be filled in for the form to be accepted.



12. Once the form contains all the fields you want, click **Save**.

Toolbox guide

Group Heading	Groups your fields into different named sections
Information	Adds text and descriptions to your forms
Question	Gives more room for a longer question. The response is an open-ended text area
Text Box	Simple text
Text Area	Longer, multi-line text
Checkbox	A single item which can be selected
Date	A text box with a date-picker calendar next to it for ease of use
Phone Number	A text box. The form will make sure that the entry is a phone number before accepting the response
Email Address	A text box. The form will make sure that the entry is an email address before accepting the response
Checkbox List	Allows multiple selections. Use this when you want all the options to be visible
Radio Button List	Allows one selection from a list
Dropdown	Similar to a radio button list in that only one selection is allowed, however this should be used when the list of options is long
State Dropdown	A dropdown with all the states pre-populated
Country Dropdown	A dropdown with all the countries pre-populated.

GROUP HEADING

Information - This is used for longer descriptions or instructions that you want to include on your form.

What is your favorite thing about using the Foxbright CMS to manage your website?

Text Box

Text Area

Check Box

Date

Phone Number

Email Address

Checkbox List

- Option 1
- Option 2
- Option 3

Radio Button List

- Option 1
- Option 2
- Option 3

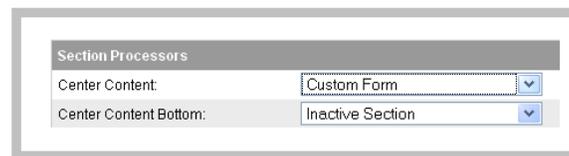
Dropdown

State Dropdown

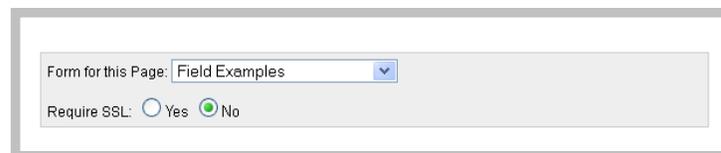
Country Dropdown

Placing a form on a page

1. Log in to the CMS Control panel by navigating to the following page:
http://[your home page]/admin
2. Click on the **Web Pages** tab
3. Create a new page by clicking on the **Add page** link. It is also possible to add a photo gallery to an existing page by clicking on the **Settings** link and following the directions below.
4. If creating a new page, enter a **Page/Menu Name**.
5. Open the **Advanced Settings** area and go to the **Section Processors** section. Change the center column of your page from HTML Content to **Custom Form**.



6. Click on **Save**.
7. Click on **Edit** for the page you created or edited above.
8. Select the form that you would like to appear. Optionally enable SSL mode if the information you are collecting is sensitive.



9. **Save** and/or **Publish** the page.

Downloading form submissions

1. Click on the **Forms** tab.
2. Find the form name in the list of forms and click **Export Responses** to the right. If the **Last Submission** column is empty, then there are no submissions on record for the form.
3. Enter the **Start Date** and **End Date** of the report you would like to see. The End Date is automatically filled in with the date of the last form submission.
4. Click **Export**

Helpful tips

- If you are collecting sensitive information, be sure to activate SSL mode both on the form itself and when you are placing it on the page.
- Forms should never be used to collect credit card numbers, even in SSL mode.
- Are you reusing the same form multiple times except for minor changes? Create a single “master” form, then use the **Copy** feature to create all the forms that you need. This is particularly helpful when using the Forms Module to accept workshop registrations.
- Is your form getting really long? Look out for long radio button lists and replace them with dropdown lists to significantly shorten the form.