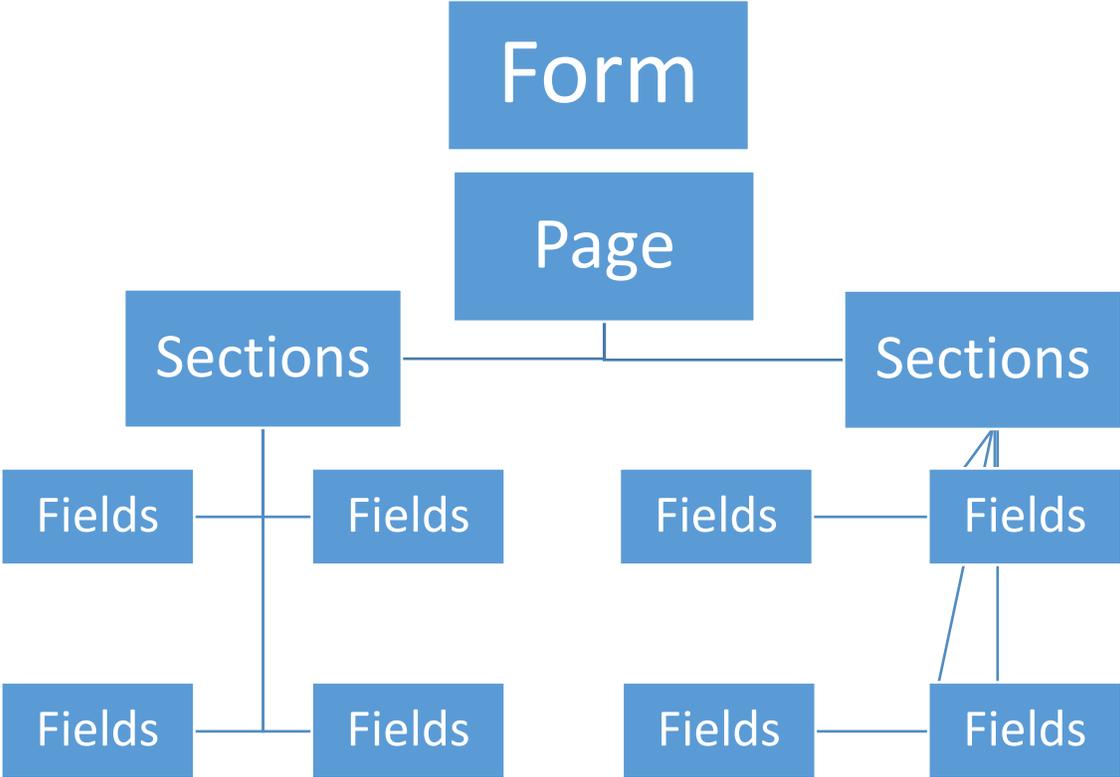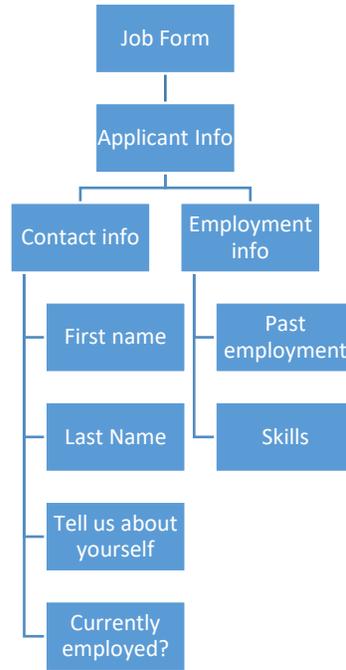# Form Builder

Form Builder Module:

Forms are a great way to collect valuable data for your business and have it sent directly to an email address, a database, or both. Form submissions can also be encrypted before being sent using a digital email certificate.

The *Form Builder* module manages the website's online forms. Forms are comprised of pages; pages are comprised of sections, and sections are comprised of fields. (**Forms -> Pages -> Sections -> Fields**). By default, the forms are not visible until they are added as a plugin on a specified page.

For example, let's say we are a company and want to build a form for employee data. A form might be structured like this:
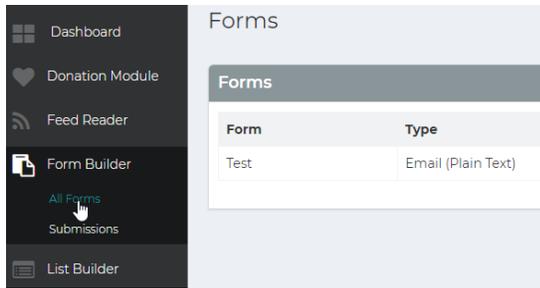

Here's how Form Builder looks in LRS Antilles:

There are 3 steps to add a form to your site:

1. Create the form in **Form Builder.**

2. Add the form to a **Page.**

3. Test the form.

Let's get started!

Step-by-step: Add a Form (Settings)

Once on the **Form Builder** page, click the "**Add New Form**" button in the upper right-hand corner. Then follow these steps:
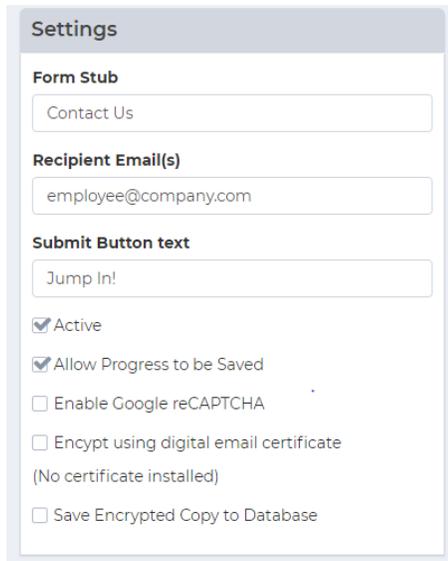
Form Details:

1. Enter the **Name** of the form. This will autofill the **Form Stub** (right column under Settings) with a hyphenated lowercase version of the title. This is the text that will display in the URL. Try to keep this short (one or two words)

2. Add the **Header Text** of the form. This is the text that displays before the header, giving the user more details about the form. This could be a call to action, prompting the visitor to complete the form.

3. Add the **Footer** of the form. This is an end message, such as a disclaimer to the form or an asterisk about information within the form.

4. **Form Submission Message**. This message verifies that the user has sent a form. A custom message will pop up after a form is submitted. If desired, you can change the message to anything you like. This verifies that the user sent a form with a custom message and will display after a form is filled and submitted.

5. **Custom JavaScript on Form Submission** – This section can be used to write custom JavaScript functions that will be triggered when a user submits a form.
    LRS developers will complete this section if required. This section is useful for Google Analytics snippets.

Right Column Settings:

1. **Form Stub:** This is the last words in the url. Keep this short, one or two words.
2. Add the **Recipient** of the form. This determines where the form information is going to, most likely an email address.
3. Change the text of the **submit** button if desired. This is the display text on the submit button for the form.
4. Check optional boxes in **Settings:**
    -   **Active:** Determines whether the current form is live on the site.

    -   If you want to build your form over time, click the "**Allow Progress to be Saved**" button.

    -   **Enable Google reCAPTCHA:** Uses Google's captcha tool, which is important for determining if the person submitting the form is a bot. This requires that the reCAPTCHA Site and Secret Keys have been setup in the *Settings Module*.

    -   **Encrypt using digital email certificate:** If checked, this will encrypt the form submission before the email is sent.

    -   **Save Encrypted Copy to Database:** Saves the encrypted form submission to the database. These forms can be viewed in the Submissions section of the *Form Builder Module.*
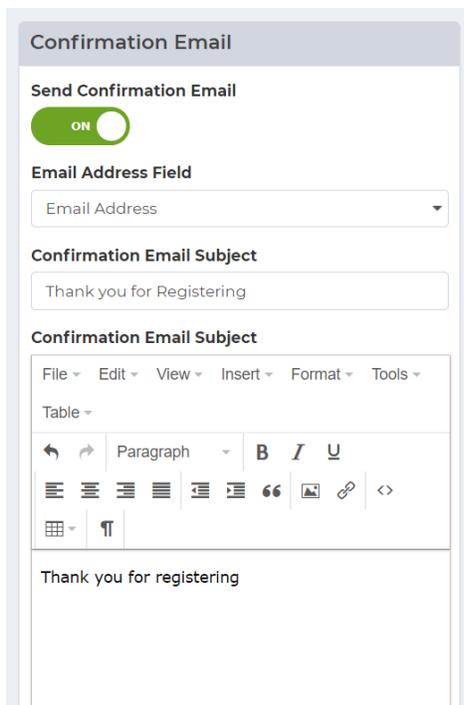
Confirmation Email

Send Confirmation Email: When enabled, this will send an email to the user who fills out this form based on their email address they use.

1. Email Address Field: This is the field that contains the users email address when they submit the form. You can have multiple people receive the form. Just use commas to separate the email addresses.

2. Confirmation Email Subject: This is the subject line for the email sent to the user

3. Confirmation Email: This is the email message sent to the user

Click "Save Form" and you are ready to start adding sections to the form.

Step-by-step: Add a Form (Sections)

Once you save the Form, you should be back at the All Forms management page. The form you just created will be included in the list. Now that you have the settings done on your form, it's time to build pages and populate the pages with fields.

To begin, Select your form and click "Pages." [a default page will be added]. Name the page and it will be included in the list.

Now you have pages on which you can place the content of the form in the "Fields." But first, the content must be organized in **Sections.** Click on Fields and you will see three boxes: "**Form Fields**"; "**Add Fields**" and "**Sections**."


In the **Sections** box, enter the name of the section and press **Add.** This will add the section to your form. This section will appear in the Section dropdown list. Once you add a Section, you can add fields to the sections.

Step-by-step: Add a Form (Fields)

Fields can contain a variety of content, from a person's age, to their name, to any information that is required for the form. **NOTE:** To add a field, you must first add a **Section** within the form.
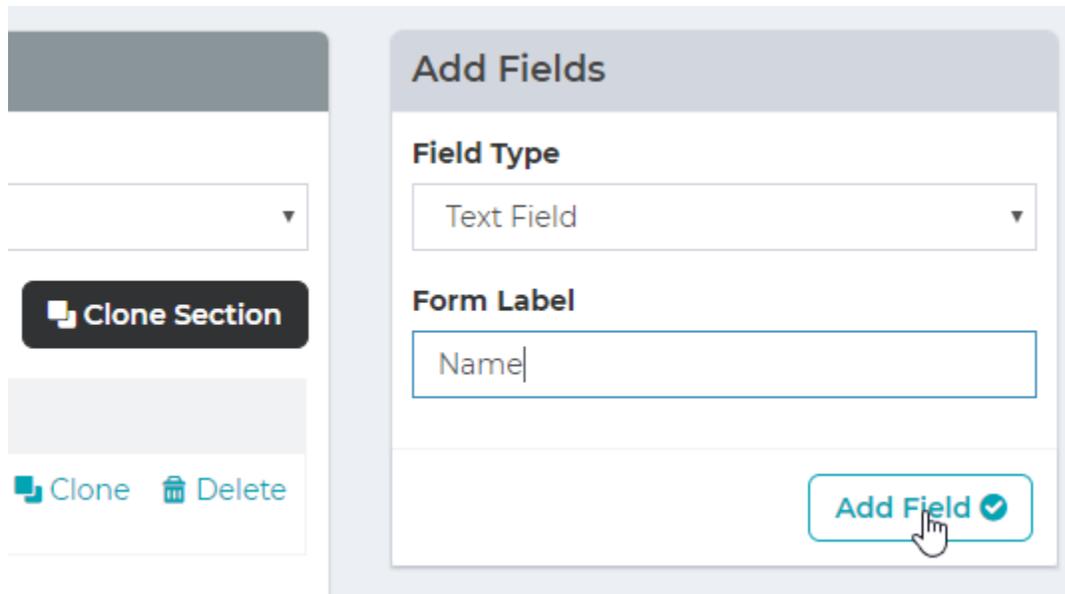
1. In the "**Add Fields**" section, select the **Field Type** from the dropdown menu. For example, a Text Field would be selected for anything that is text-related, like a name.

2. Enter the **Form Label** of the input (First Name, Last Name). This will be the display that the user will see when going through the form.

3. Add the field with the 'Add Field' button.

4. Now you can sort this among other fields, mark if the field is required, clone (duplicate) it, or delete. In the Options box, you can mark if you want any validations.

5. Click Save Field.

6. Continue to create fields as you need.

Form Fields

Section

Contact Info

Clone Section

Sort	Label	Type	CSS Class ⓘ	Required			
1	Name	text		☐	⚙ Advanced	⧉ Clone	🗑 Delete
2	Name	text		☐	⚙ Advanced	⧉ Clone	🗑 Delete
3	Tell us about you	textarea		☐	⚙ Advanced	⧉ Clone	🗑 Delete
4	Currently Emplo	checkbox		☐	⚙ Advanced	⧉ Clone	🗑 Delete

Save Fields ✓

Add Fields

Field Type

Checkbox

Form Label

Add Field ✓

Sections

New Section Name		Add

Section	Sort	Hide Title		
Contact Info	1	☐	⚙	🗑

Step-by-step: Add a Form (Advanced Fields)

The advanced button leads you to option to customize your fields.

Field Options

Section

Contact Info

Type

Text Field

Label

Name

CSS Class

Tooltip Text

Last On

☐ Mobile

☐ Tablet

☐ Desktop

Placeholder Text

Function

None

Function Trigger

None

- **Label:** Label is the words that will appear before the radio buttons within the page.
- **CSS Class:** This is how the list will be styled, and for the more tech savvy, it is the class that will be used to style the form field. Fields can have multiple classes.

Separate classes with spaces like shown above with full and last. Classes are indexed on the last page.
- **Tooltip text:** This includes adding a small icon to help your user understand what data you want entered in the field.
- **Last On:** Last on is used for the field depending on which platform the field will display in the rightmost column on, and generally used for style purposes.

 Most forms will have grid styles defined in the /style-guide page

- **Placeholder Text:** This is text that will show in the field giving the person a description of what the expected value in the field is.
  Function can be removed in this version.

- **Option Values:** These are the different radio buttons that can be clicked on and should be separated with the | character. This is just above the enter button on most keyboards on the shifted backslash key.
- **Default Value:** This is for a field that has a preselected field. When the form loads, if there is a default value then that option value will be the checked value.
- **Option Required Trigger:** This is the value from the list of options that <u>cannot </u>be selected to submit the form. For example, "–select a value—" is commonly used for this field.

Step-by-step: Add a Form (Add to Page)

Now that you have pages, sections and fields, you are ready to add the form to page on the website. Forms are considered "plugins" to the page.

First a page must exist to house the form (See Add a Page). Once the webpage is added and ready, edit the page and click the plug icon. Select Form Builder and select the form you want to add from the dropdown menu. Click "Validate Plugin"
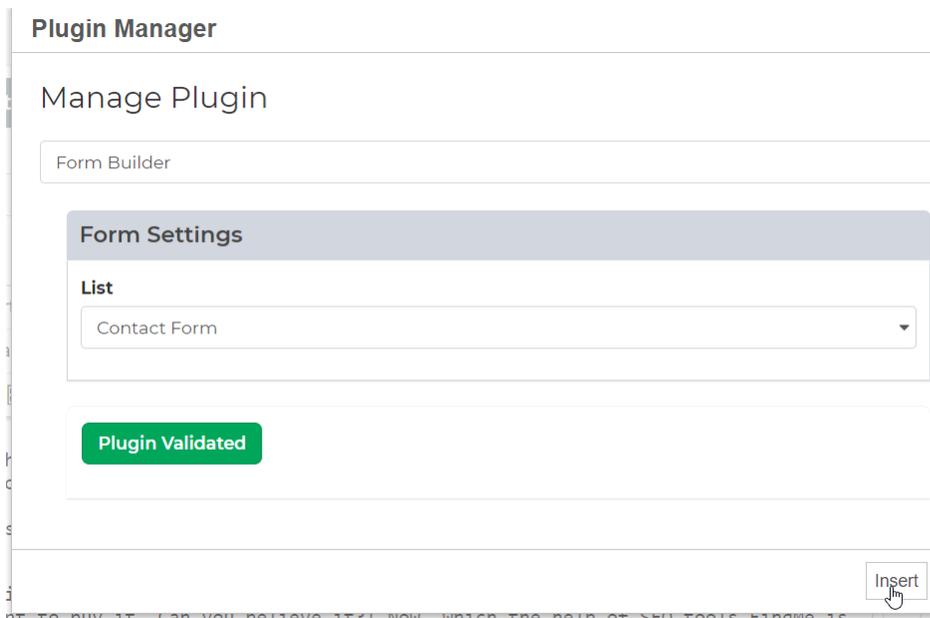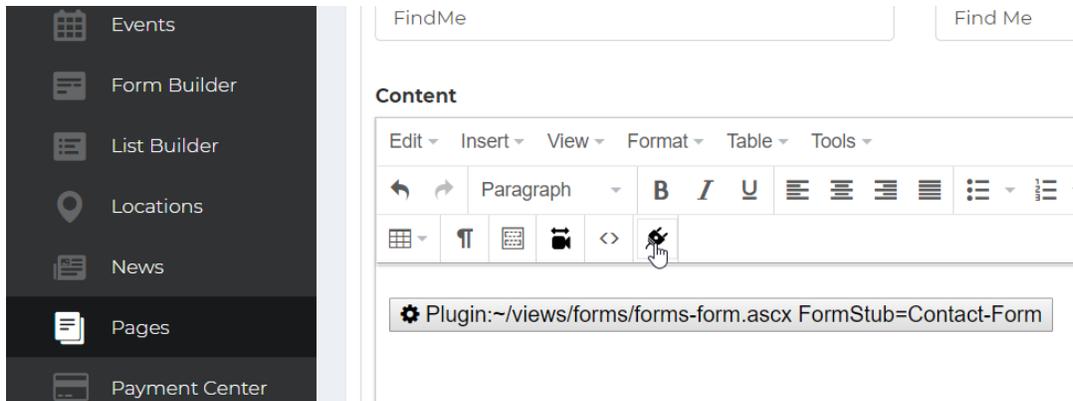
NOTE: Plugins can only be added after they are validated.

Insert the form, save the page and then preview it to see your form.

Step-by-step: Add a Form (Section – Advanced Options)

Here you can set conditions on the section that allow it to be hidden or shown. This includes adding or hiding sections based on criteria and user's information.

To add a condition: (**1**) Select a section of the form that contains a control you want to watch. (**2**) Select the control you want to watch the value of. (**3**) Select your equality operator. (**4**) Select the value that will satisfy the condition.

You can add as many conditions as you like to build the logic for your form. You can (**5**) choose to combine the various conditions with an **OR** clause or an **AND** clause. Condition values cannot be edited but they can be (**6**) deleted.

You can move this section to another part of the form by selecting a different Form Page Part (**7**)