

Form Builder Manual

A brief overview of your website's Form Builder with screenshots.

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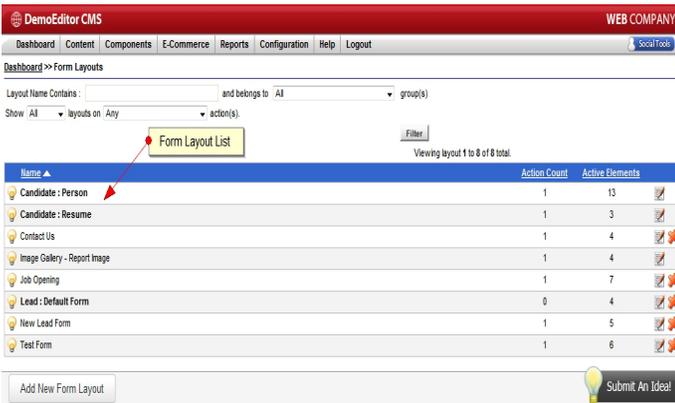
Form Builder:



To create a form to use on a content page, advanced registration, or any other component, first login to your site.



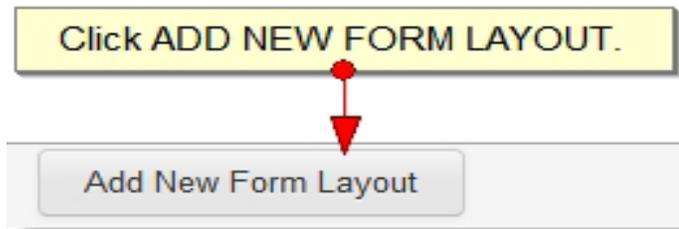
- Under the **Components** menu item, navigate to **Components > Form Manager > BUILD/EDIT (LAYOUTS)**.



This will bring you to a list of all current Web Form Layouts.

*Click images to see larger view. Click “Back to Section” in larger view to jump back to the section you were reading.

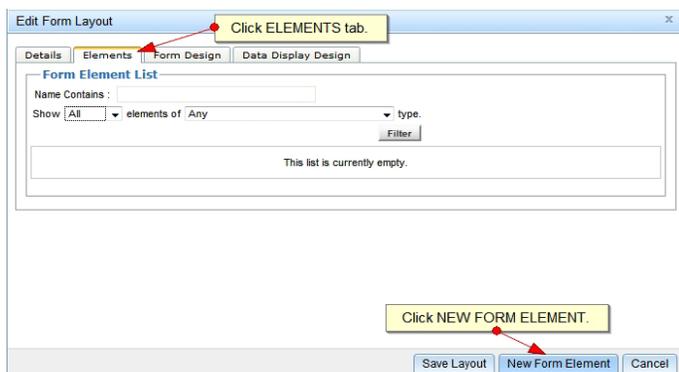
Creating a New Web Form:



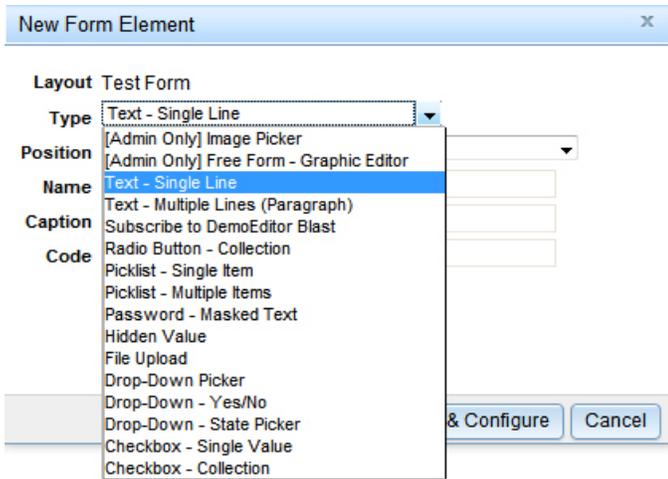
To create a new web form, click on the **Add New Form Layout** button.



- **Name** your form and hit Tab. A **code** will generate (this is for the system to reference your form).
- Click **Add & Configure**.

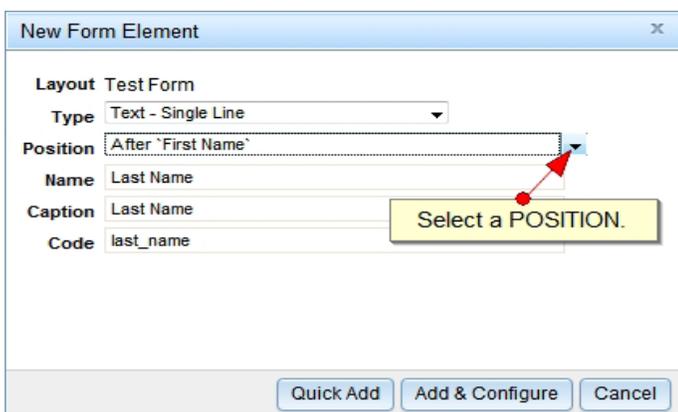


- Select the **Elements** tab.
- Click **New Form Element**.



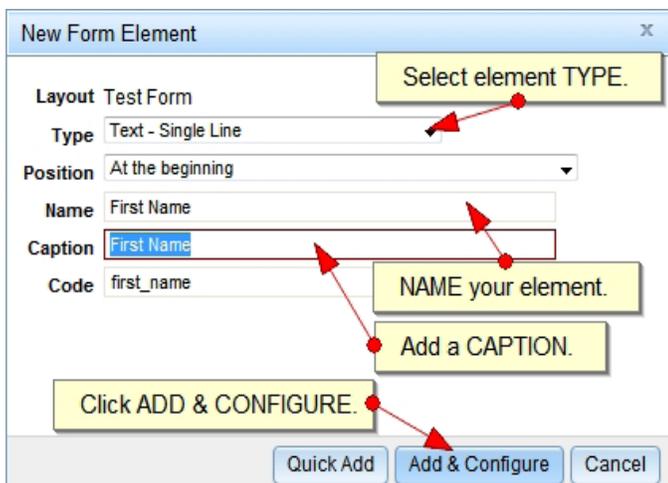
Type – This is the kind of element that you wish to create in order to collect information, e.g. Single Line Text, Radio Buttons, Check Boxes, Dropdowns, etc.

- Select an **element type** from the dropdown picker.



Position – Once more than one element has been created, you have the option to select the order in which a new element will appear. By default, a new form element will be added to the end of a form, after the previous element.

- Select a **position** from the dropdown picker or leave it at the default “After [‘previous name’]”.



Name – A form element name only appears in the backend of the system. This should be the title, or subject, of the information being collected.

- Type the **name** of your form element. Press the Tab key.

The screenshot shows the 'New Form Element' dialog box with the following fields and callouts:

- Layout:** Test Form
- Type:** Text - Single Line (Callout: Select element TYPE.)
- Position:** At the beginning
- Name:** First Name (Callout: NAME your element.)
- Caption:** First Name (Callout: Add a CAPTION.)
- Code:** first_name
- Buttons:** Quick Add, Add & Configure, Cancel (Callout: Click ADD & CONFIGURE.)

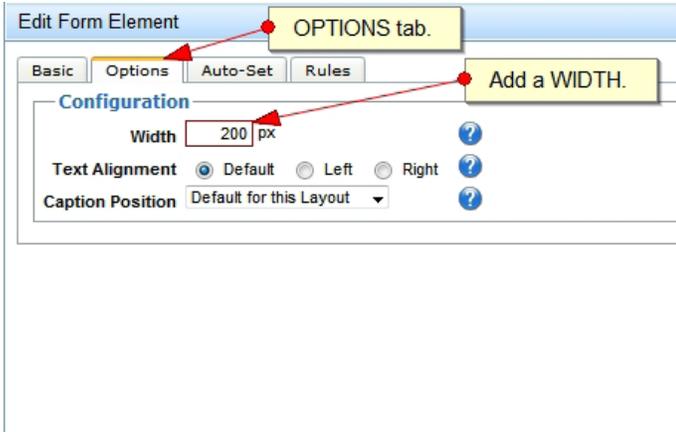
Caption – A form element caption will display on the front end form as the title or subject of the information being collected. This should be the same as the Name. ***(This will auto-generate by hitting the Tab key once an element has been named.)**

- If desired, modify the caption by typing in the **caption** field.

Code – A form element code will be referenced by the system and should not be modified. ***(This will auto-generate by hitting the Tab key once an element has been named.)**

- Click **Add & Configure**.

Editing a Form Element:

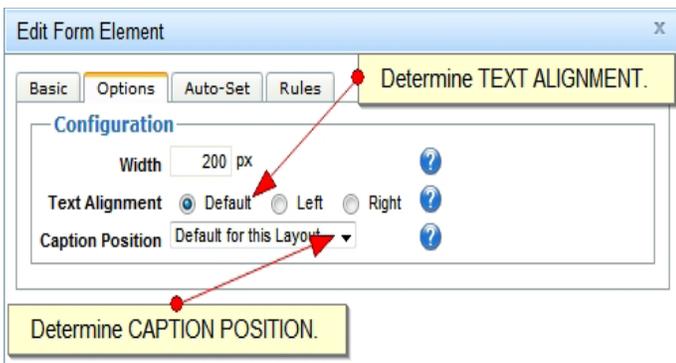


Basic Tab – This shows the essential information of a form element. You can also change an element’s position within the form here.

Options Tab

Width – This is the width (in pixels) of the text element. 200 px is an average size.

Enter a **width** for the text element.

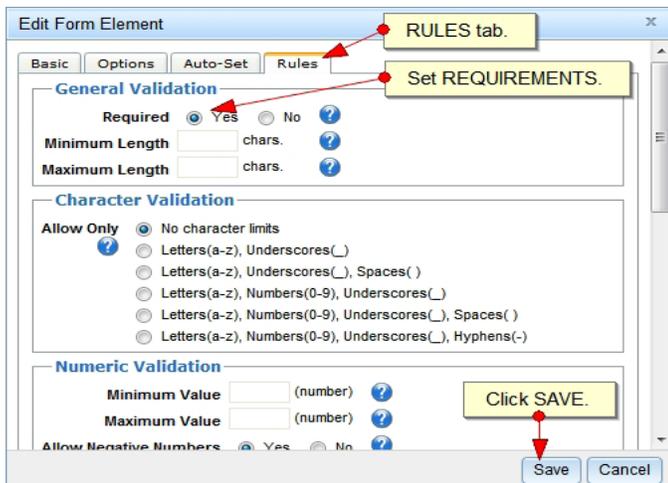


Text Alignment – The alignment of the text inside of the element. Usually numeric fields have a right alignment so the numbers line up. The default is set at design time in the stylesheet.

Change the **text alignment** by selecting the appropriate radio button.

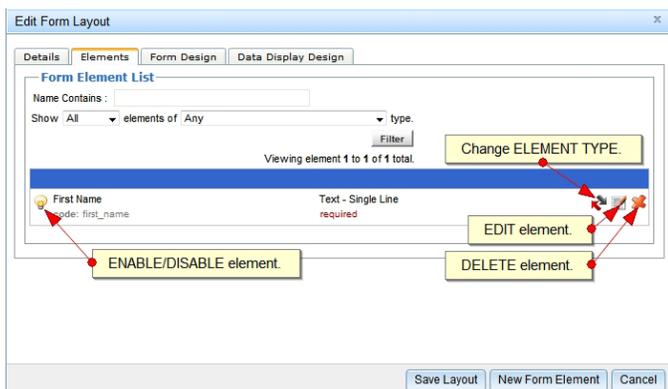
Caption Position – This determines where the caption will be placed in relation to the form element itself.

Change the **caption** by selecting the desired position from the dropdown.



Rules Tab

- Set **validation rules** like Required (which requires a value to be set before a form can be submitted), Minimum and Maximum Character Lengths, Character Validation, Numeric Validation, Credit Card Validation, Valid Email Address, Web Address, Phone Style, Zip Code, and more.
- Once you have completed your form element, click the **Save** button.



Repeat the previous steps for each form element that you would like to include.

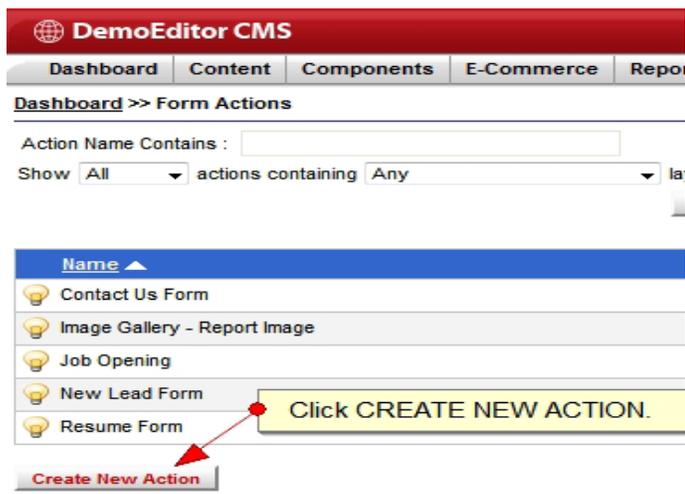
- You can edit the order in which elements appear by moving them up or down the list with the **blue arrows**.
- Change a **form element type** by selecting the **black and red arrow icon**.

Creating a Form Action:

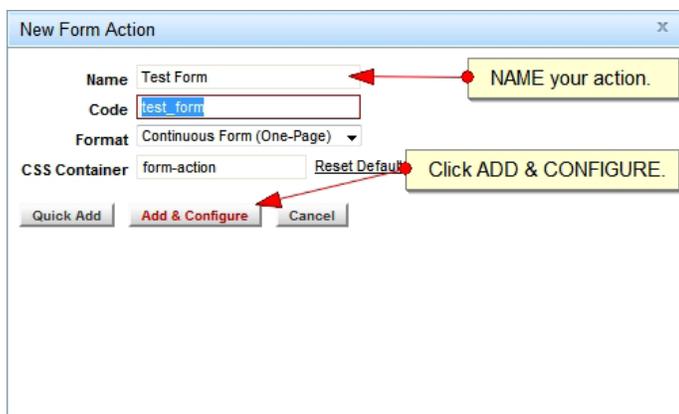


Before a form can be added to a page, it must be given an action. The form action determines what happens to the information once a user clicks “submit”.

- From the top menu, select **Components > Form Manager > ACTION HANDLER**.



- Click the **Create New Action** button.

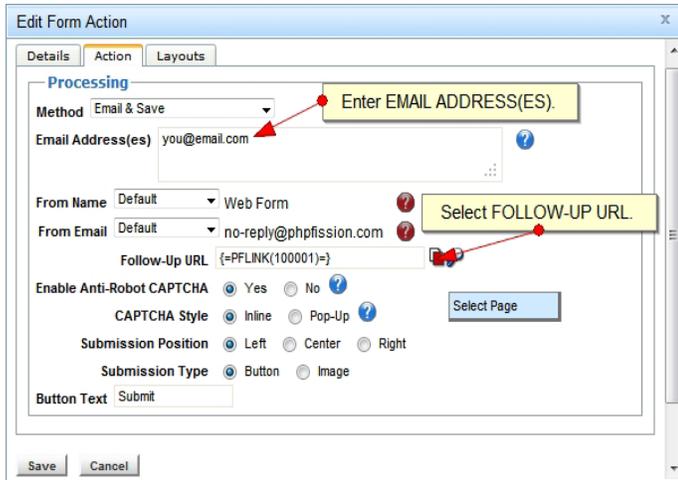


Enter a **name** for your form action. ***(For organizational purposes, you should name your action the same as you named your form.)**

Press the **Tab** key and a code will generate. ***(This will be referenced by the system and should not be modified.)**

Click the **Add & Configure** button.

Select the **Action Tab**.



Action Tab

Select a **Processing Method** from the dropdown. ***(Email & Save is the most common processing method used.)**

Enter up to 5 **email addresses** that you wish form responses to be sent to. Each email address should be separated by comma or entered on a new line.

Follow-up URL – This is the page that users who have filled out a form will be redirected to once the submission has been processed.

Select a **Follow-up URL** from the Select Page icon.

Select the **Layouts tab**.

Adding a Form Layout to an Action:

Layouts Tab

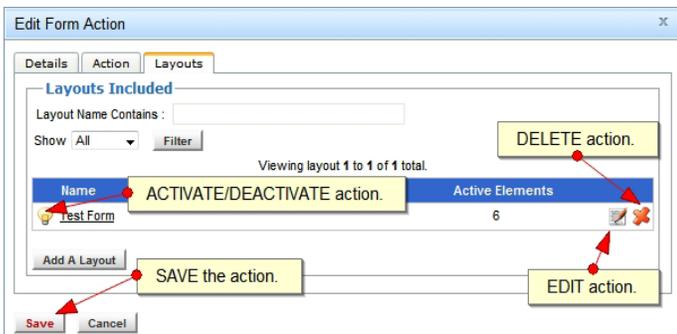
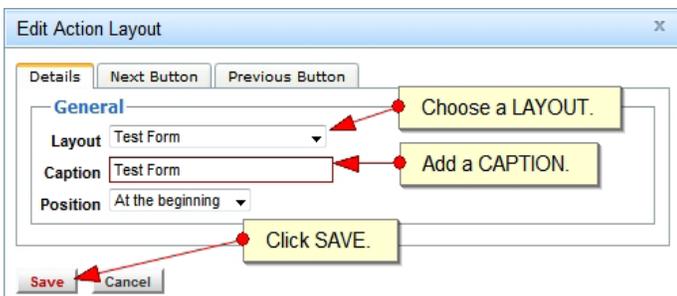
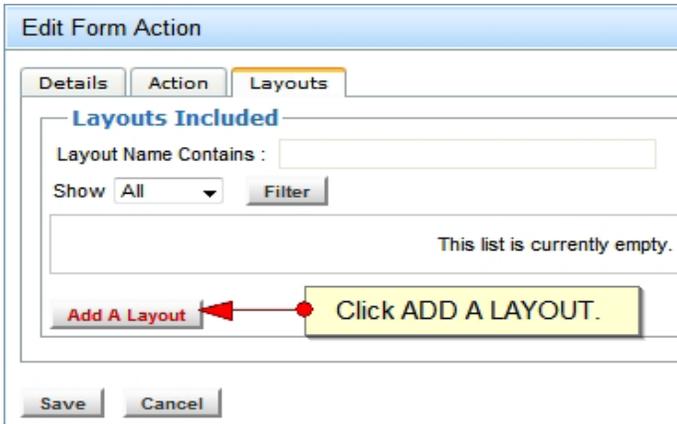
Click the **Add a Layout** button.

Under the **Details tab**, select a **layout** from the dropdown.

Add a **caption** (this will display in the form submission email).

Click the **save** button to save the layout.

Click the **save** button to save the action.

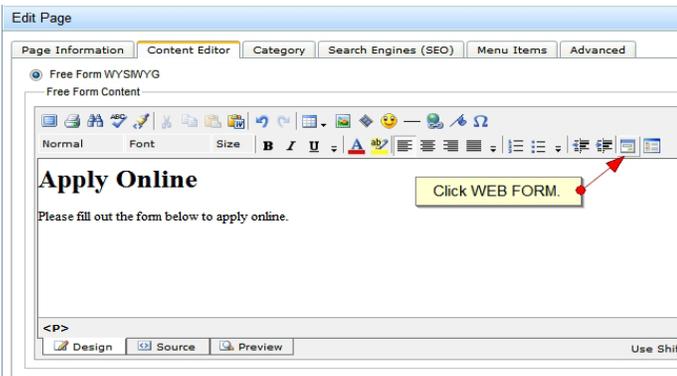


Adding a Form to a Page:

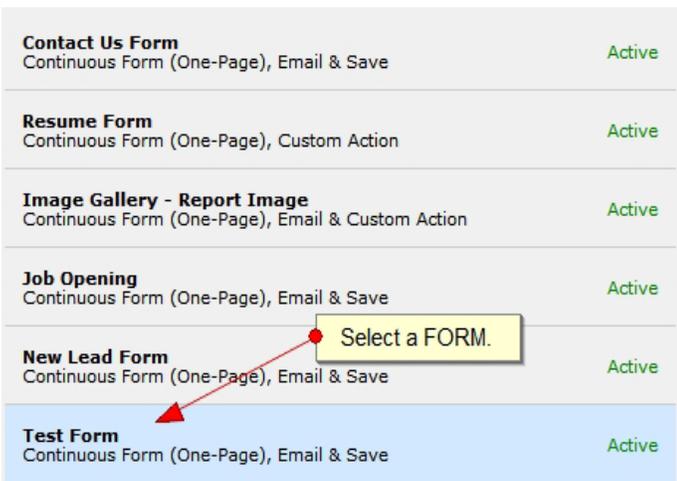
Once a form has been created and given an action, you can add it to a page.

Navigate to the page that you wish to add the form to.

- Place your cursor in the editor window. Click the **Web Form** button in your toolbar.

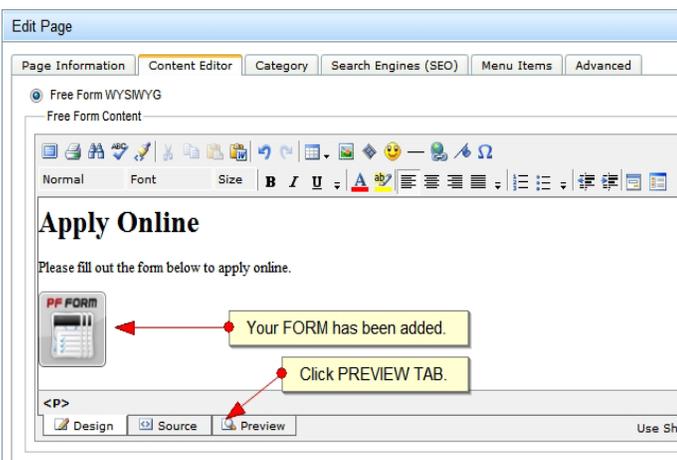


- Select a **form** to insert on your page.



A **PF Form** icon will appear in your editor window.

- To view the form on the frontend of your website, click the **Preview** tab.



Your Form on a Content Page:

Your form will appear on your page, protect by a CAPTCHA.

Apply Online

Please fill out the form below to apply online.

First Name

Last Name

Phone

Email

How did you hear about us?

Comments

Security Code...

Type Code Above Into This Box

Submit

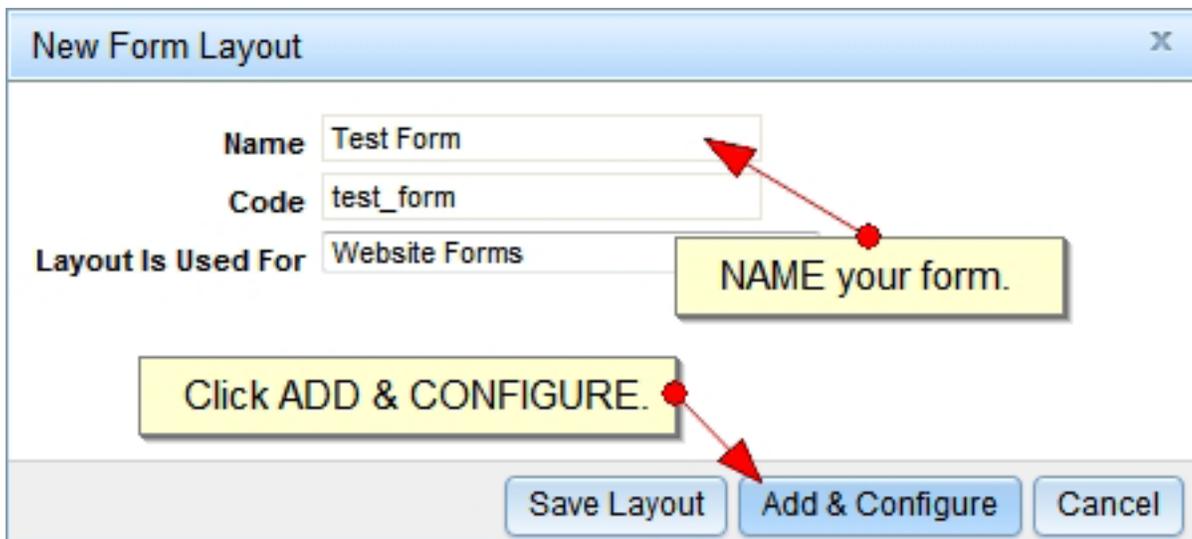
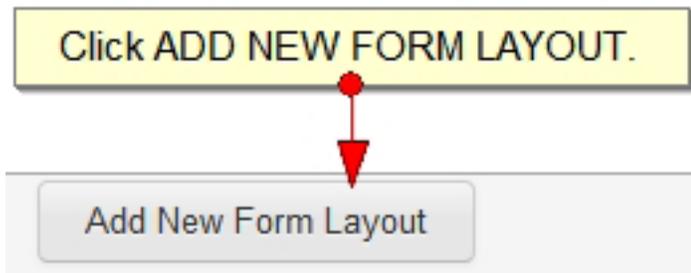
Form Builder:

The screenshot shows the DemoEditor CMS navigation menu. The 'Components' menu is open, and the 'Build / Edit (Layouts)' option is highlighted with a red arrow. A yellow callout box with a red dot pointing to the 'Build / Edit (Layouts)' option contains the text: "Click BUILD/EDIT (LAYOUTS)."

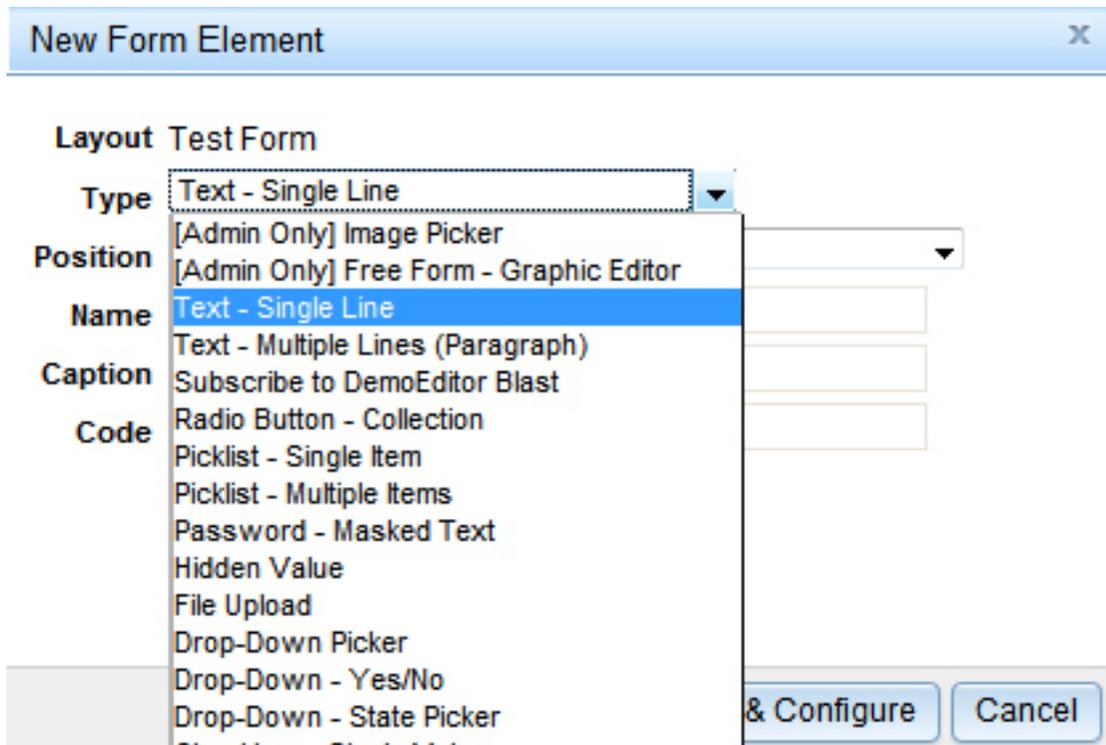
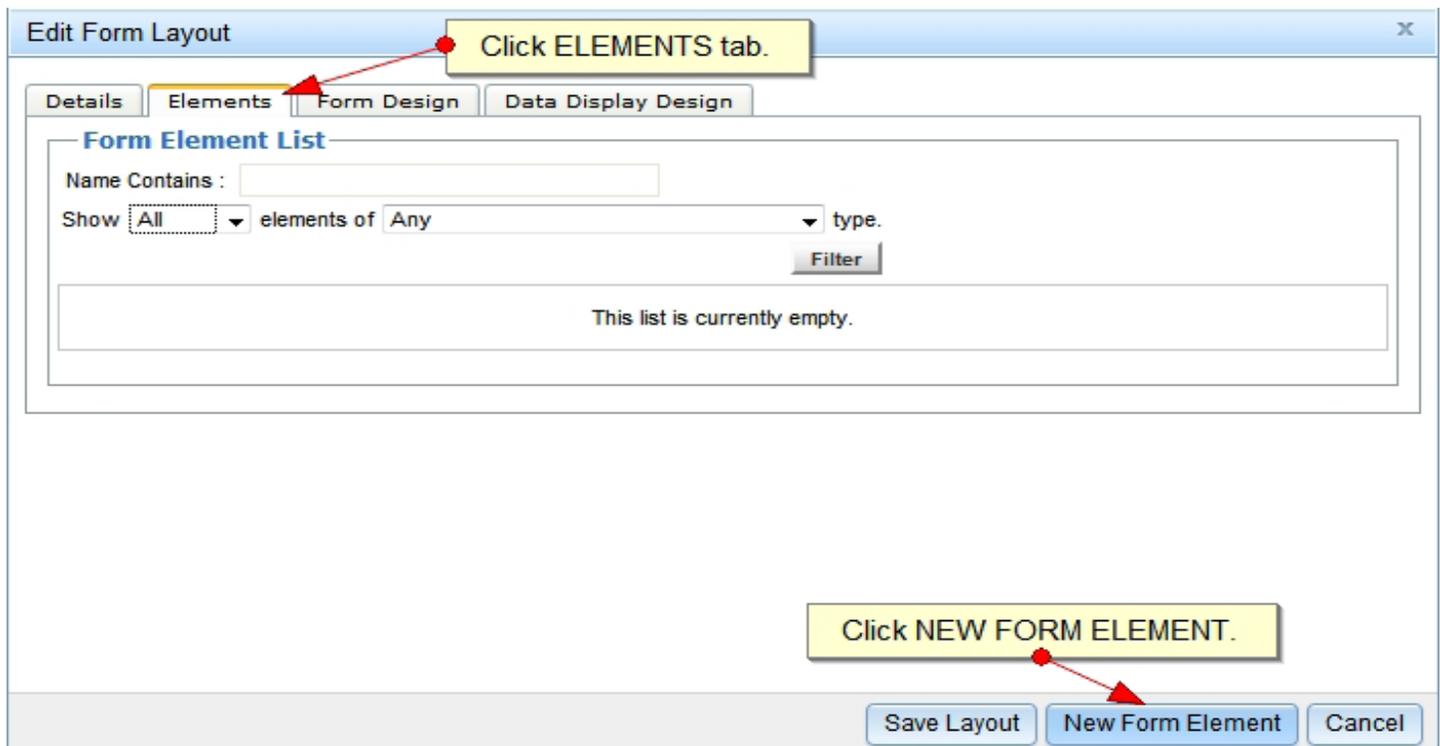
The screenshot shows the 'Form Layouts' dashboard in DemoEditor CMS. The page title is 'Dashboard >> Form Layouts'. There are search and filter options for layout names and groups. A table lists various form layouts with their action counts and active elements. A yellow callout box with a red arrow points to the first row of the table, which is 'Candidate : Person'.

Name ▲	Action Count	Active Elements
💡 Candidate : Person	1	13
💡 Candidate : Resume	1	3
💡 Contact Us	1	4
💡 Image Gallery - Report Image	1	4
💡 Job Opening	1	7
💡 Lead : Default Form	0	4
💡 New Lead Form	1	5
💡 Test Form	1	6

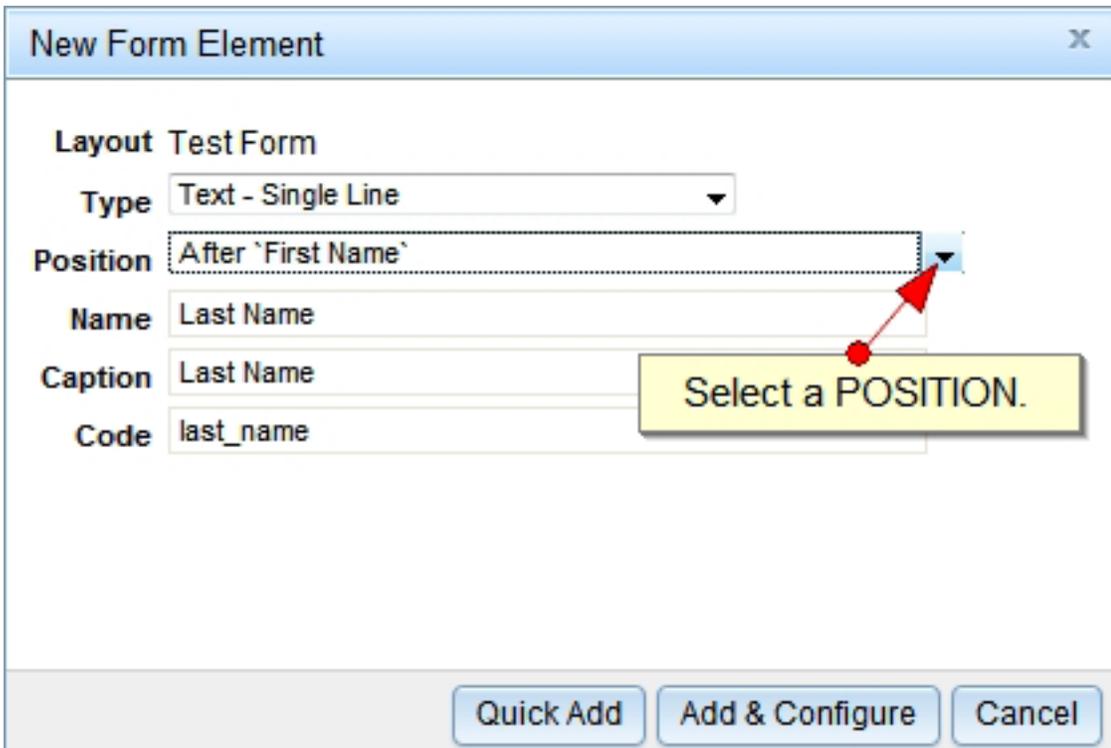
Creating a New Web Form:



Creating a New Web Form (Cont.):



Creating a New Web Form (Cont.):

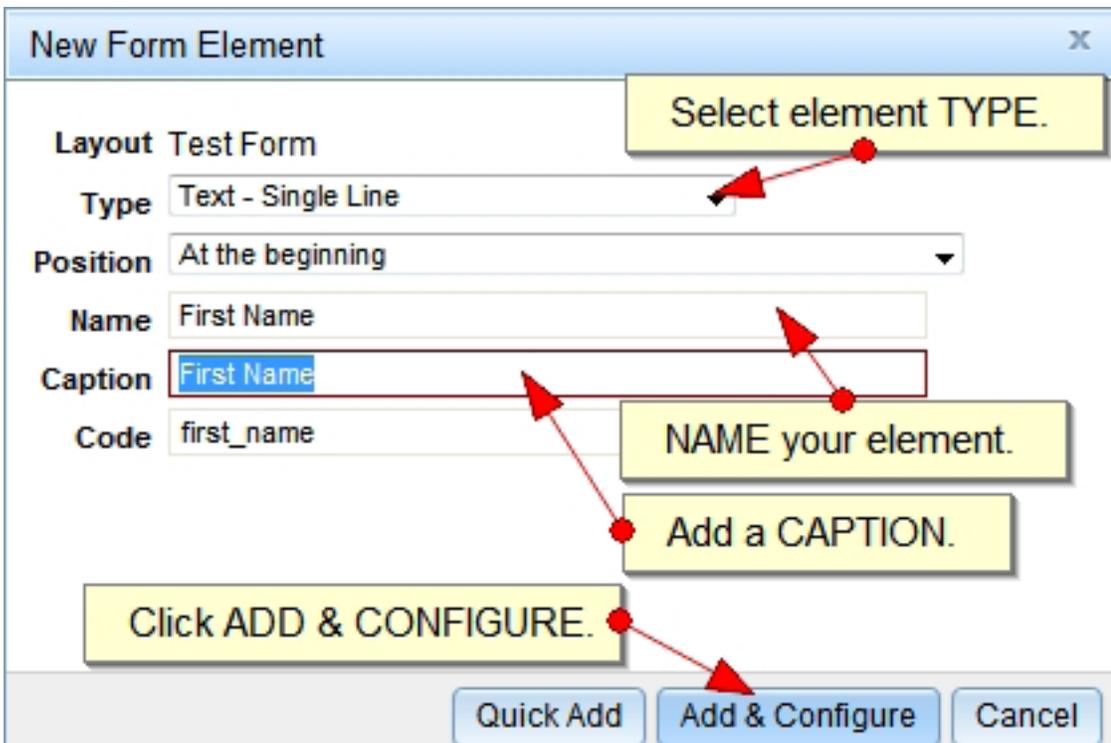


The screenshot shows the 'New Form Element' dialog box with the following configuration:

- Layout: Test Form
- Type: Text - Single Line
- Position: After 'First Name'
- Name: Last Name
- Caption: Last Name
- Code: last_name

A yellow callout box with the text 'Select a POSITION.' has a red arrow pointing to the 'Position' dropdown menu.

Buttons at the bottom: Quick Add, Add & Configure, Cancel.



The screenshot shows the 'New Form Element' dialog box with the following configuration and instructional callouts:

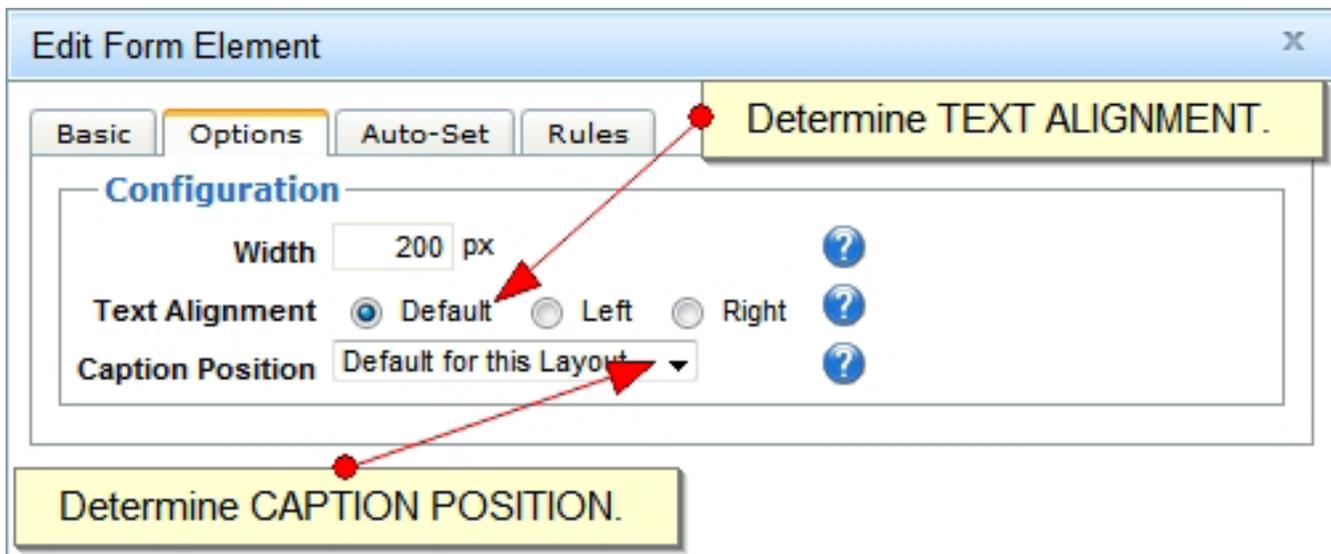
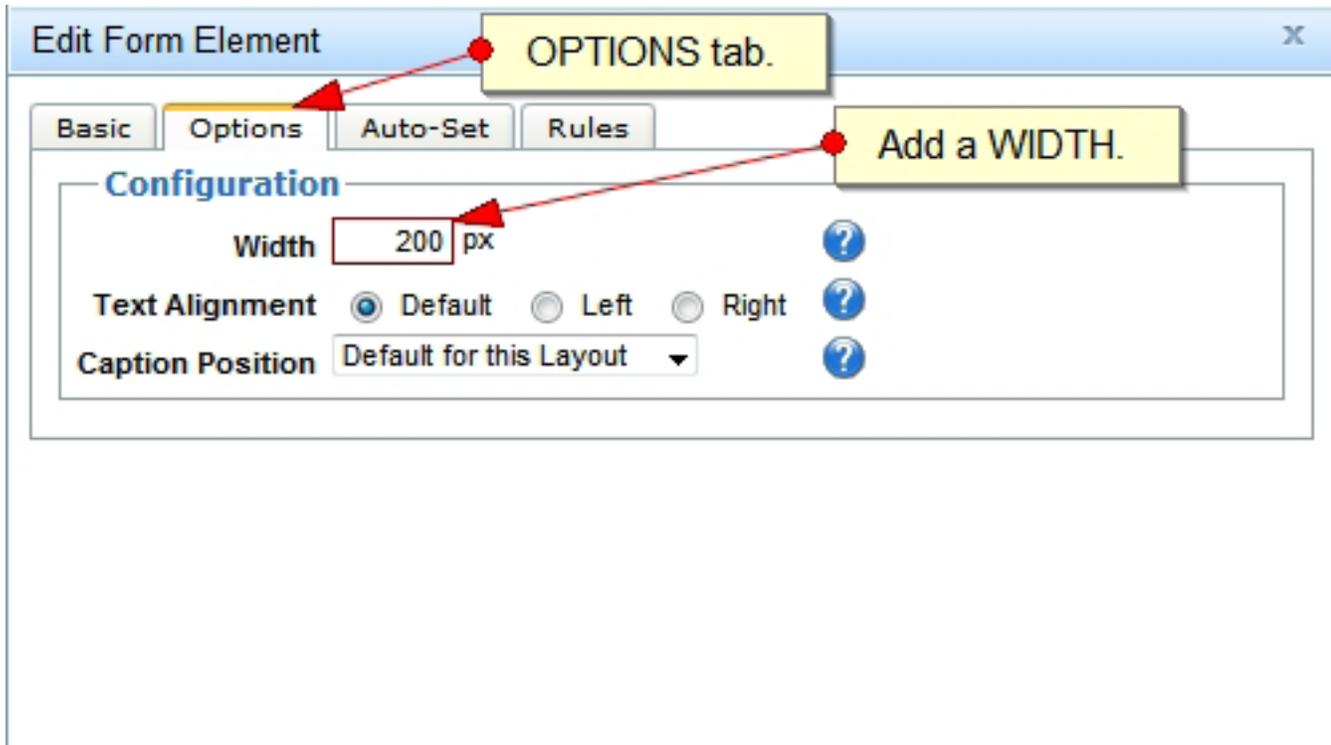
- Layout: Test Form
- Type: Text - Single Line
- Position: At the beginning
- Name: First Name
- Caption: First Name
- Code: first_name

Yellow callout boxes with red arrows provide instructions:

- 'Select element TYPE.' points to the 'Type' dropdown.
- 'NAME your element.' points to the 'Name' text box.
- 'Add a CAPTION.' points to the 'Caption' text box.
- 'Click ADD & CONFIGURE.' points to the 'Add & Configure' button.

Buttons at the bottom: Quick Add, Add & Configure, Cancel.

Editing a Form Element:



Editing a Form Element (Cont.):

The screenshot shows the 'Edit Form Element' dialog box with the 'Rules' tab selected. The 'General Validation' section has 'Required' set to 'Yes'. The 'Character Validation' section has 'Allow Only' set to 'No character limits'. The 'Numeric Validation' section has 'Minimum Value' and 'Maximum Value' fields. A 'Click SAVE.' callout points to the 'Save' button.

Rules tab.

Set REQUIREMENTS.

General Validation

Required Yes No

Minimum Length chars.

Maximum Length chars.

Character Validation

Allow Only No character limits

Letters(a-z), Underscores(_)

Letters(a-z), Underscores(_), Spaces()

Letters(a-z), Numbers(0-9), Underscores(_)

Letters(a-z), Numbers(0-9), Underscores(_), Spaces()

Letters(a-z), Numbers(0-9), Underscores(_), Hyphens(-)

Numeric Validation

Minimum Value (number)

Maximum Value (number)

Allow Negative Numbers Yes No

Click SAVE.

Save Cancel

The screenshot shows the 'Edit Form Layout' dialog box with the 'Elements' tab selected. The 'Form Element List' shows a single element: 'First Name' (Text - Single Line, required). Callouts point to the 'ENABLE/DISABLE element.' button, the 'EDIT element.' button, the 'Change ELEMENT TYPE.' button, and the 'DELETE element.' button.

Edit Form Layout

Details Elements Form Design Data Display Design

Form Element List

Name Contains:

Show All elements of Any type.

Filter

Viewing element 1 to 1 of 1 total.

ENABLE/DISABLE element.

EDIT element.

Change ELEMENT TYPE.

DELETE element.

First Name
code: first_name
Text - Single Line
required

Save Layout New Form Element Cancel

Creating a Form Action:

The screenshot shows the DemoEditor CMS interface. The top navigation bar includes 'Dashboard', 'Content', 'Components', 'E-Commerce', 'Reports', and 'Conf'. The 'Components' menu is expanded, showing options like 'Social Media', 'Form Manager', 'Image Gallery', 'Jobs & Recruiting', 'Download Exports', and 'FAQ'. A sub-menu for 'Form Manager' is also visible, containing 'Build / Edit (Layouts)', 'Action Handler', 'Element Manager', and 'Form Submission Export'. A yellow callout box with the text 'Click ACTION HANDLER.' has a red arrow pointing to the 'Action Handler' option in the sub-menu. Below the menu, a table header 'Name' is visible, with a row for 'Candidate - Person'.

The screenshot shows the DemoEditor CMS interface for 'Form Actions'. The top navigation bar includes 'Dashboard', 'Content', 'Components', 'E-Commerce', 'Reports', and 'Cc'. The 'Form Actions' page has a search field for 'Action Name Contains', a dropdown for 'Show All' actions containing 'Any' layout(s), and a 'Filter' button. Below the search fields is a table with a header 'Name' and several rows of form actions: 'Contact Us Form', 'Image Gallery - Report Image', 'Job Opening', 'New Lead Form', and 'Resume Form'. A yellow callout box with the text 'Click CREATE NEW ACTION.' has a red arrow pointing to the 'Create New Action' button at the bottom left of the table.

Creating a Form Action (Cont.):

New Form Action

Name: Test Form

Code: test_form

Format: Continuous Form (One-Page)

CSS Container: form-action

Reset Default

Quick Add | **Add & Configure** | Cancel

NAME your action.

Click ADD & CONFIGURE.

Edit Form Action

Details | **Action** | Layouts

Processing

Method: Email & Save

Email Address(es): you@email.com

From Name: Default Web Form

From Email: Default no-reply@phpfission.com

Follow-Up URL: {=PFLINK(100001)=}

Enable Anti-Robot CAPTCHA: Yes No

CAPTCHA Style: Inline Pop-Up

Submission Position: Left Center Right

Submission Type: Button Image

Button Text: Submit

Select Page

Save | Cancel

Enter EMAIL ADDRESS(ES).

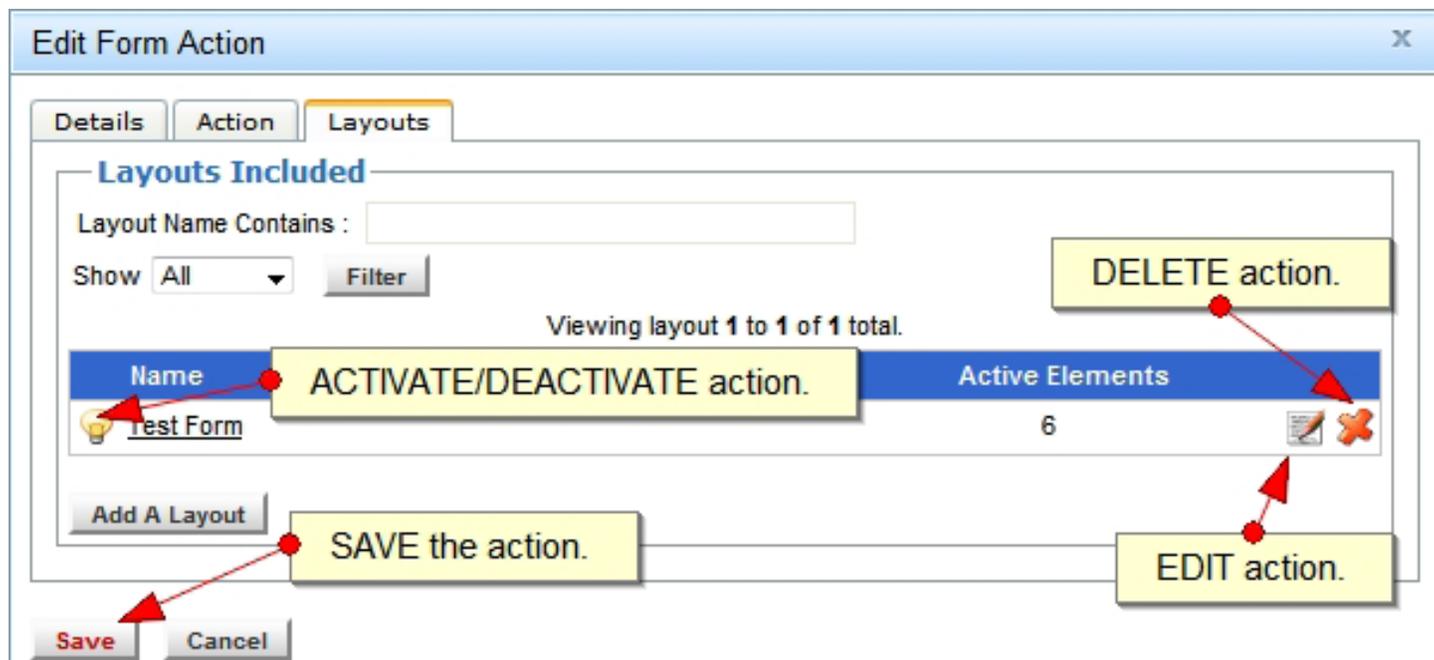
Select FOLLOW-UP URL.

Creating a Form Action (Cont.):

The screenshot shows the 'Edit Form Action' dialog box with the 'Layouts' tab selected. The 'Layouts Included' section contains a search field for 'Layout Name Contains', a 'Show All' dropdown menu, and a 'Filter' button. Below these is a message stating 'This list is currently empty.' A yellow callout box with the text 'Click ADD A LAYOUT.' has a red arrow pointing to the 'Add A Layout' button. At the bottom of the dialog are 'Save' and 'Cancel' buttons.

The screenshot shows the 'Edit Action Layout' dialog box with the 'General' tab selected. The 'Layout' dropdown is set to 'Test Form', the 'Caption' text box contains 'Test Form', and the 'Position' dropdown is set to 'At the beginning'. Three yellow callout boxes provide instructions: 'Choose a LAYOUT.' points to the 'Layout' dropdown, 'Add a CAPTION.' points to the 'Caption' text box, and 'Click SAVE.' points to the 'Save' button. The 'Save' and 'Cancel' buttons are visible at the bottom left.

Creating a Form Action (Cont.):



Adding a Form to a Page:

Edit Page

Page Information | **Content Editor** | Category | Search Engines (SEO) | Menu Items | Advanced

Free Form WYSIWYG

Free Form Content

Normal | Font | Size | **B** | *I* | U | A | ab | [List Icons] | [Form Icons]

Apply Online

Please fill out the form below to apply online.

<P>

Design | Source | Preview | Use Shift

Contact Us Form Continuous Form (One-Page), Email & Save	Active
Resume Form Continuous Form (One-Page), Custom Action	Active
Image Gallery - Report Image Continuous Form (One-Page), Email & Custom Action	Active
Job Opening Continuous Form (One-Page), Email & Save	Active
New Lead Form Continuous Form (One-Page), Email & Save	Active
Test Form Continuous Form (One-Page), Email & Save	Active

Adding a Form to a Page (Cont.):

Edit Page

Page Information | **Content Editor** | Category | Search Engines (SEO) | Menu Items | Advanced

Free Form WYSIWYG

Free Form Content

Normal | Font | Size | **B** | *I* | U | A ab | [List Icons]

Apply Online

Please fill out the form below to apply online.

PF FORM [Form Icon]

Your FORM has been added.

Click PREVIEW TAB.

<P>

Design | Source | Preview | Use Shi

Apply Online

Please fill out the form below to apply online.

First Name

Last Name

Phone

Email

How did you hear about us?

Comments

Security Code...



Type Code Above Into This Box

Submit