

## Chapter: 9

# Forms

(7.0.5)

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This chapter will explain how a form works and where the data is sent and stored, how to use a contact form for a simple email retrieval of data, and how a dataset can link to the fields of a form.

Forms are a very powerful tool as data entered into the form can be collected and stored on the system as well as integrate with an external Customer Relationship Management (CRM) system.

## Creating a form

On a new install of Zenario there will be a simple form set up for you.

To access the back-end of the form, in order to view and edit the forms on your website, go into Organizer and click on the “Forms” icon .

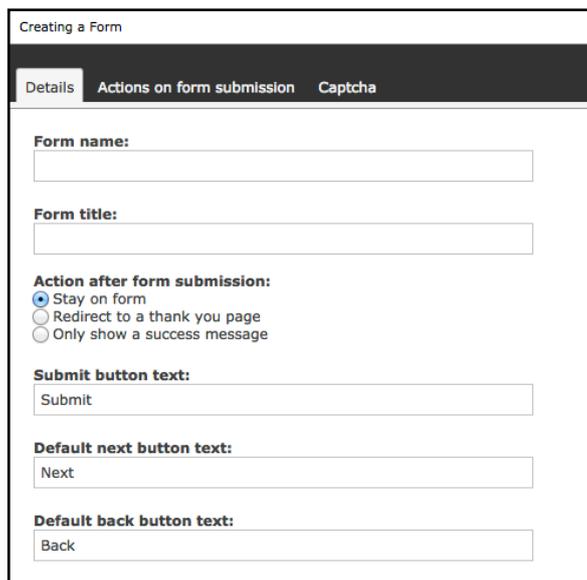
You will then see the forms that have been created on your website:



To create a new form, click the “create” button.



A pop-up box will appear with some form options:

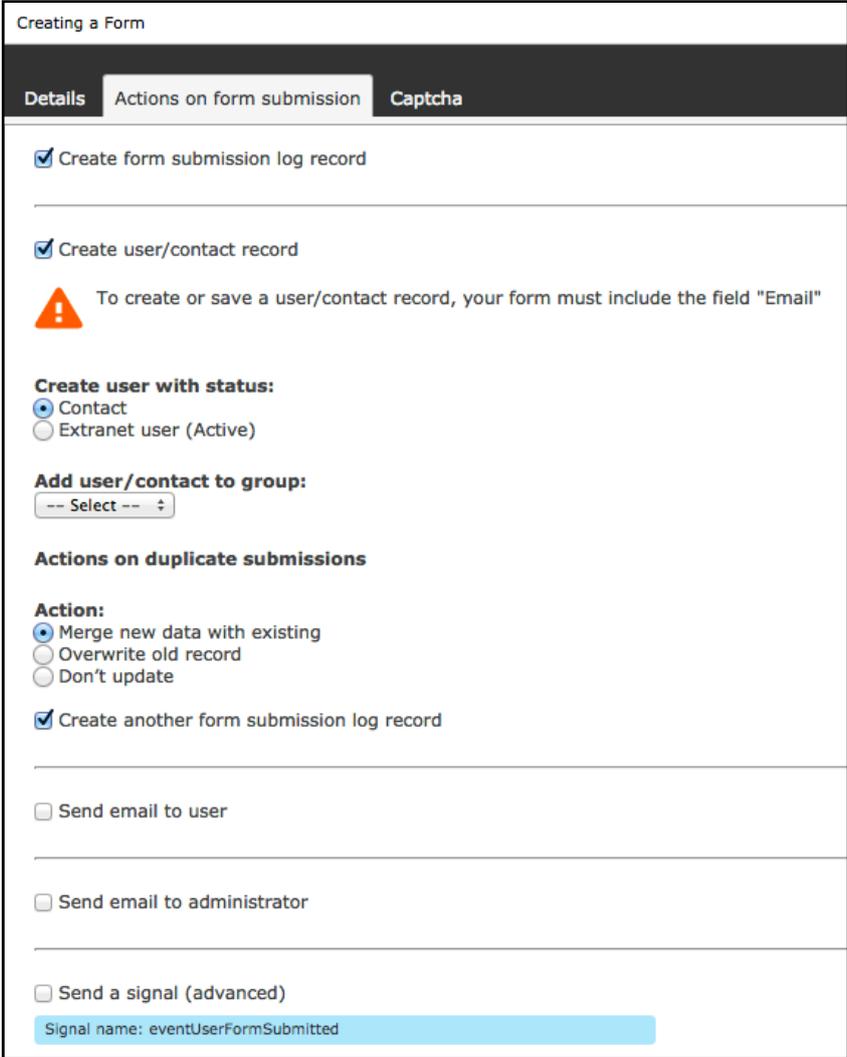


The screenshot shows a pop-up box titled 'Creating a Form'. It has three tabs: 'Details', 'Actions on form submission', and 'Captcha'. The 'Details' tab is selected. The form contains the following fields and options:

- Form name:** A text input field.
- Form title:** A text input field.
- Action after form submission:** Three radio button options: 'Stay on form' (selected), 'Redirect to a thank you page', and 'Only show a success message'.
- Submit button text:** A text input field with 'Submit' entered.
- Default next button text:** A text input field with 'Next' entered.
- Default back button text:** A text input field with 'Back' entered.

Here you can choose the “Form name” as it appears in the back-end, the “Form title” that will be displayed on the front-end of the website, actions after the form has been submitted and the text that will be shown on forms with multiple pages.

The next tab deals with what happens when a form is submitted.



The screenshot shows a web interface titled "Creating a Form" with three tabs: "Details", "Actions on form submission", and "Captcha". The "Actions on form submission" tab is active. It contains several configuration options:

- Create form submission log record
- Create user/contact record
-  To create or save a user/contact record, your form must include the field "Email"
- Create user with status:**
  - Contact
  - Extranet user (Active)
- Add user/contact to group:**
- Actions on duplicate submissions**
- Action:**
  - Merge new data with existing
  - Overwrite old record
  - Don't update
- Create another form submission log record
- Send email to user
- Send email to administrator
- Send a signal (advanced)  
Signal name: eventUserFormSubmitted

You can create a submission record of the form data to store on the system. When a site visitor submits your form you can choose to store them as a contact or active extranet user and also add them to a group. If the User already has data on the system you can choose to merge it with existing, overwrite and old record or not to update anything and if that should create another record in the log.

Users and administrators can also be sent an email when a form is submitted.

The tab “Captcha” enables you to put a captcha at the end of your form, which can stop some automated spam issues.

Once you have chosen your settings, click save and you will see your new form has appeared:

Properties Duplicate View ▼ Delete					
<input checked="" type="checkbox"/>		ID ▼	Name ▲	Field...	Log...▼
<input checked="" type="checkbox"/>		2	Contact Us	0	0
<input type="checkbox"/>		1	Simple contact form	3	1

## Adding fields to a form

Now that you have created your form, you can add fields to it by clicking on the folder icon.

You will then see a screen with some options:

<input type="checkbox"/>	ID ▼	Name ▼	Type ▼	Read only ▼	Required ▼	Value list
There is nothing to display in this view.						

- ❖ Add a user field (linked) - This allows you to add a field from the “Users” dataset (see dataset guide) in order to store the information on the linked field if the form makes a contact/extranet User. These fields are usually used for the Name and
- ❖ Add a field (unlinked) - These can be custom built fields without having to have a dataset.
- ❖ Add section description - Add some text on a form page(s)
- ❖ Add a page break - Adds a new page to the form to make a multi-page form.

This example will show you how to add an unlinked field. Once the button has been clicked you will see an option to select the type of field you want to use.

**Details**

An unlinked field is not tied to any user dataset field. Therefore any information entered into an unlinked field can only be saved in the submission log, or used in emails.

**Type:**

- Single checkbox
- Multiple checkboxes
- Date
- Editor
- Multiple radio-buttons
- Select list
- Text
- Textarea
- URL
- Attachment
- Mirrored
- Calculated

## Note

*The field types are explained in the Dataset user guide. With the exception of a "Mirrored" field, which shows information input in a different field, and "Calculated" field which can apply addition or subtraction between two fields.*

If selecting a "Text" field for example, some more options will appear in the box:

**Name:**

**Label:**

**Mandatory / Read-only:**  
None ▾

**Visibility:**  
Visible ▾

**Validation:**  
None ▾

**Width:**  
Medium ▾

**Placeholder:**

**Note to user:**

**CSS classes:**

**Wrapper div class:**

“Name” is for admin use only, “Label” is the text that will appear above the field on the front end.

Making a field mandatory will mean that the field has to be filled in or the form cannot be submitted.

“Validation” refers to the format of the information being entered. For example choosing email validation would require a correctly formatted email address.

“Placeholder” will put text inside the field box itself which will then be removed when the visitor starts typing.

“Note to user” puts some text below the field that will display on the front-end of the website for visitor reference.

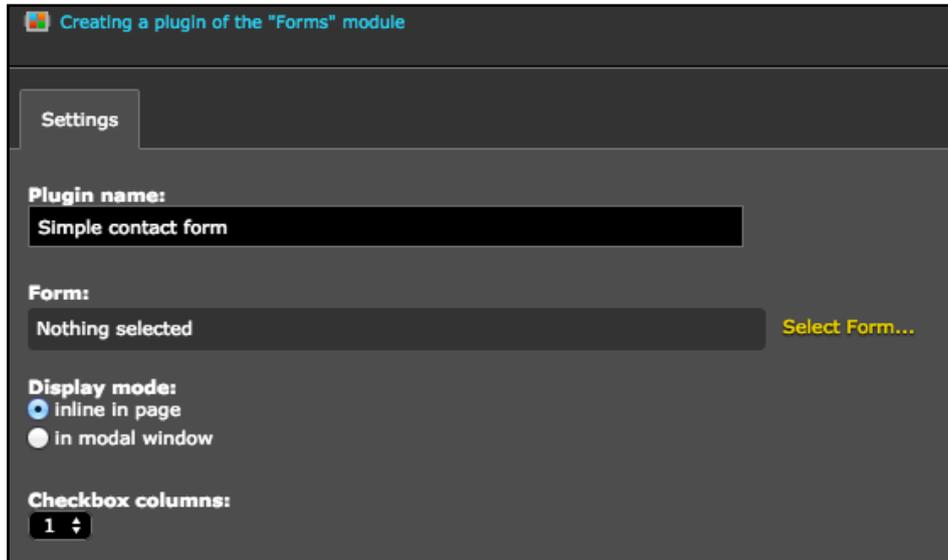
Go through this process and you should have a list of fields for your form:

<input type="checkbox"/> Add a user field (linked) <input type="checkbox"/> Add a field (unlinked) <input type="checkbox"/> Add section description <input type="checkbox"/> Add a page break							
<input type="checkbox"/>	<input type="checkbox"/>	ID ▼	Name ▼	Type ▼	Read only ▼	Required ▼	Value list
<input type="checkbox"/>	<input type="checkbox"/>	6	<b>First Name:</b>	Text	No	No	n/a
<input type="checkbox"/>	<input type="checkbox"/>	7	<b>Last Name:</b>	Text	No	No	n/a
<input type="checkbox"/>		9	<b>Page break 1</b>	page_break	No	No	n/a
<input type="checkbox"/>	<input type="checkbox"/>	8	<b>Email:</b>	Text	No	No	n/a
<input type="checkbox"/>		10	<b>Page break 2</b>	page_break	No	No	n/a
<input type="checkbox"/>	<input type="checkbox"/>	5	<b>Company</b>	Text	No	Yes	n/a

## Adding a form to your website

To add a form onto a page click 'Insert plugin from library' on an empty slot. Click the folder next to 'Forms' and click 'Create a plugin'.

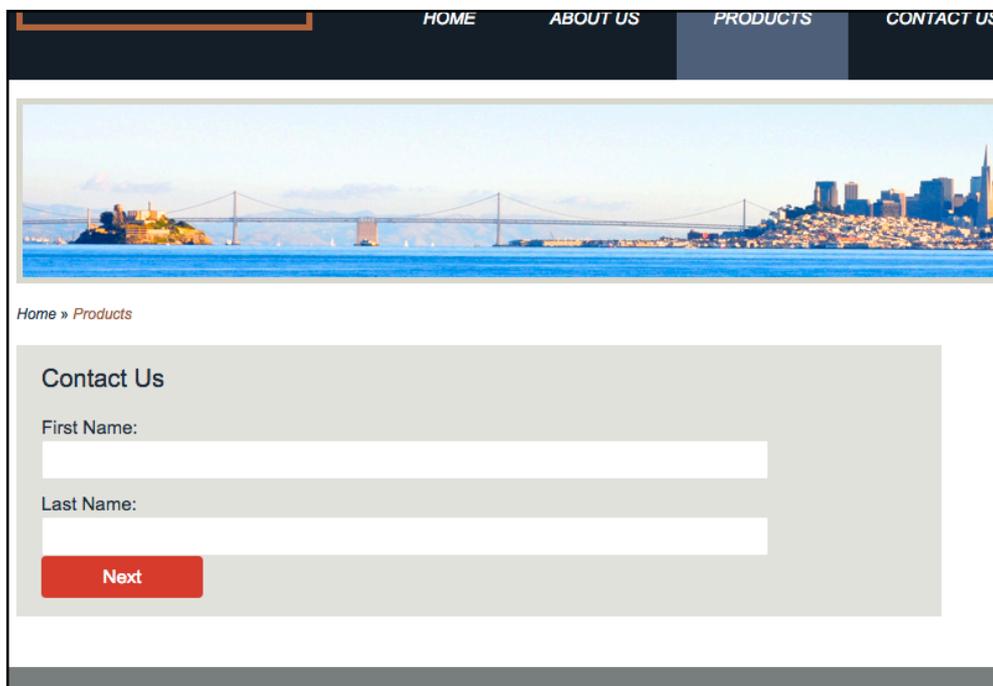
Name the plugin and 'Select form'.



The screenshot shows a dark-themed dialog box titled "Creating a plugin of the 'Forms' module". It has a "Settings" tab selected. The "Plugin name:" field contains "Simple contact form". The "Form:" dropdown menu is set to "Nothing selected" with a yellow "Select Form..." button to its right. Under "Display mode:", the "inline in page" radio button is selected, and the "in modal window" radio button is unselected. The "Checkbox columns:" field is set to "1" with up and down arrows.

Then choose the form you just created and click "Insert plugin".

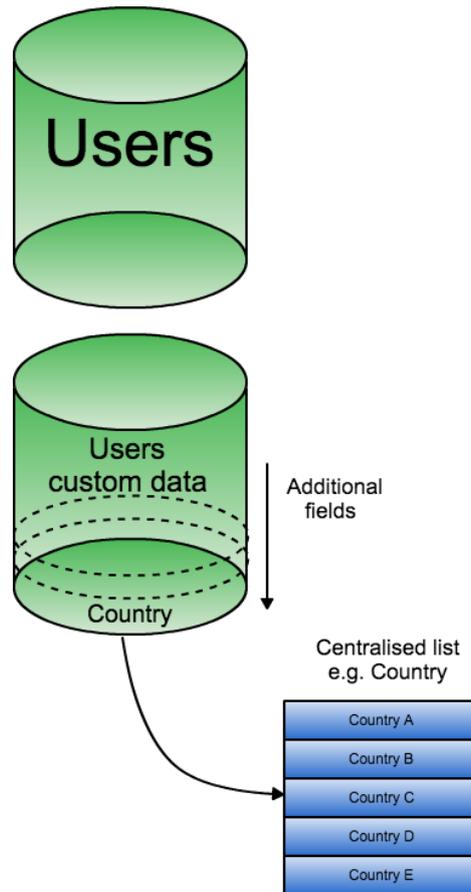
The form will now appear on your webpage.



The screenshot shows a website page with a dark navigation bar containing "HOME", "ABOUT US", "PRODUCTS", and "CONTACT US". Below the navigation bar is a large banner image of a suspension bridge over water. Below the banner is a breadcrumb trail "Home » Products". The main content area features a "Contact Us" form with two input fields labeled "First Name:" and "Last Name:", and a red "Next" button at the bottom.

Due to the page breaks, there is a next button until the last page where there will be a submit button.

## How a form works



The diagram above shows that there are two different ways of storing user data. The first is the system generated 'User' information, such as email, first name and last name.

The second is 'Users custom data' where custom fields such as a centralised list of countries is stored.

When a form is submitted the two databases are used in conjunction with each other to provide the system and forms with the fields that are required.

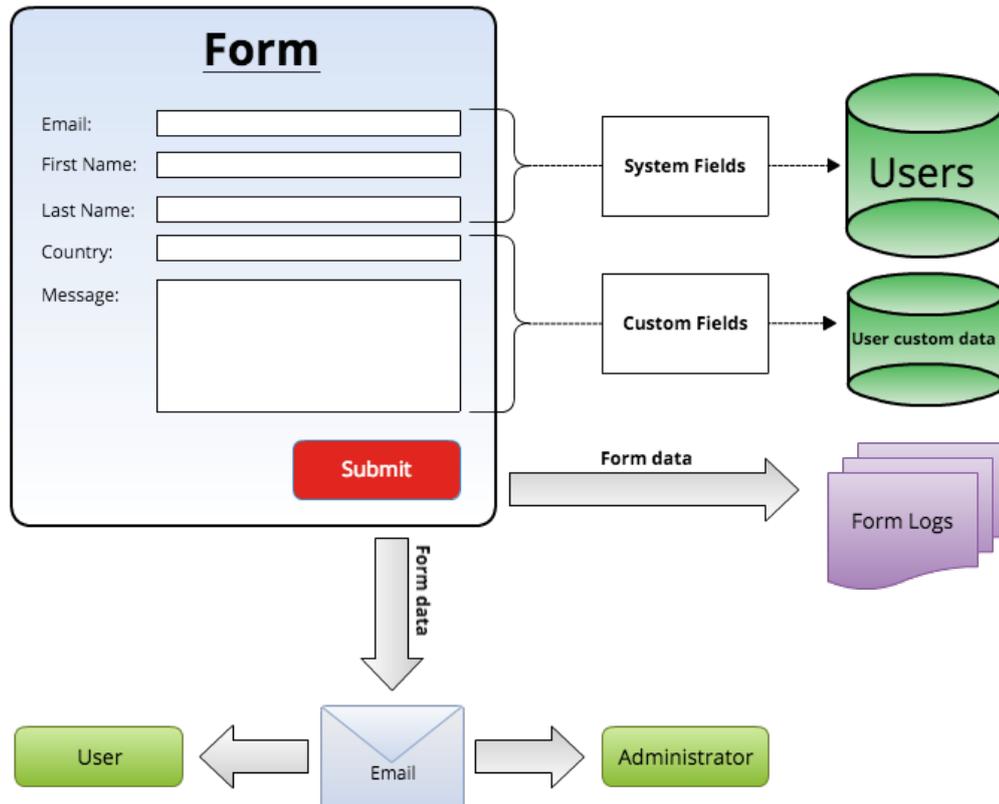


Diagram 2 shows what happens to the data and information when a form is submitted. The system fields and custom fields are populated with the information entered, to be saved on the database. The data can also be sent via email to administrators detailing the data entered and to users requesting email verification. The complete form data is also stored in a log system for future reference.

## Contact Forms

A contact form is a basic form for a simple website that will inform the administrator (or email of your choice) of the information input via an email.

A basic form can be seen below. Notice that the CAPTCHA option has been selected. This checks that there is a human filling in the form rather than an automated program.

**Use this form to contact us**

Your Name:

Your Email Address:

Your Phone Number:

Your Message:

Please help us combat form submissions by spam devices:

  Enter Code:

**Submit** **Clear Form**

There are some elements that can be controlled in a contact form such as additional fields. These fields are defined from preinstalled phrases on the CMS and include fields such:

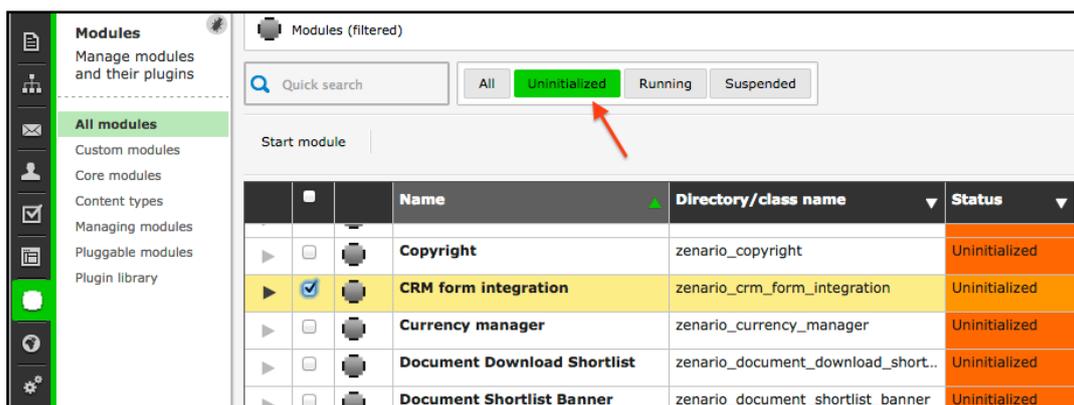
- ❖ Company
- ❖ Address
- ❖ City
- ❖ Province
- ❖ Post Code
- ❖ Country

## CRM Integration

There is also CRM integration available on forms, so that the data is pushed to your other system.

In order to do so go to the “Modules” tab in Organizer and choose all uninitialized modules.

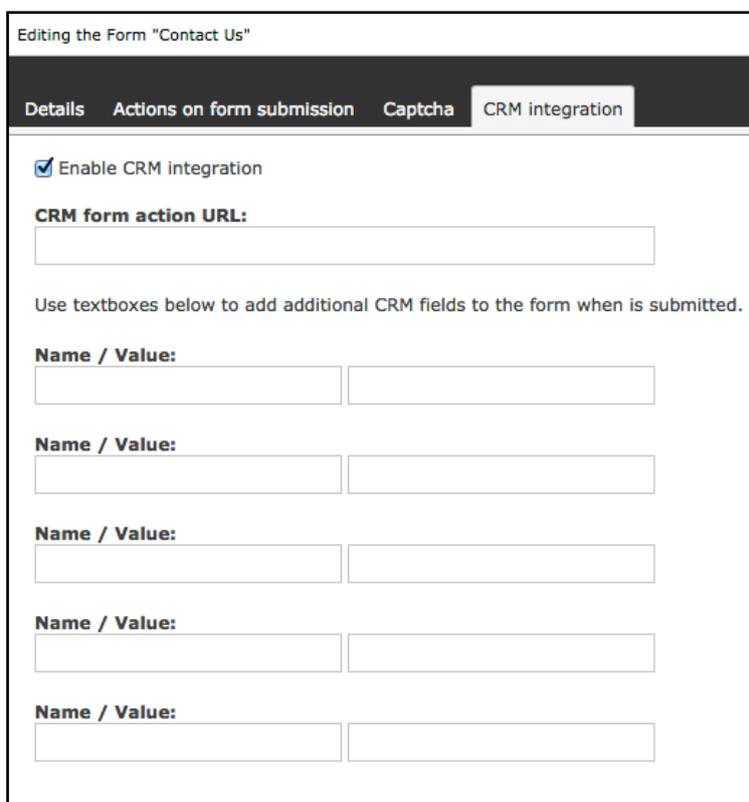
Look for the “CRM form integration” module and click “Start module”.



The screenshot shows the 'Modules' management interface. On the left, a sidebar lists various module categories. The main area displays a table of modules, filtered to show only 'Uninitialized' ones. The 'CRM form integration' module is highlighted in yellow, and a red arrow points to the 'Start module' button next to it.

	Name	Directory/class name	Status
<input type="checkbox"/>	Copyright	zenario_copyright	Uninitialized
<input checked="" type="checkbox"/>	CRM form integration	zenario_crm_form_integration	Uninitialized
<input type="checkbox"/>	Currency manager	zenario_currency_manager	Uninitialized
<input type="checkbox"/>	Document Download Shortlist	zenario_document_download_short...	Uninitialized
<input type="checkbox"/>	Document Shortlist Banner	zenario_document_shortlist_banner	Uninitialized

Then go to the Forms tab and look at the properties of your form. A new tab called “CRM integration” will appear.



The screenshot shows the 'Editing the Form "Contact Us"' interface. The 'CRM integration' tab is active, and the 'Enable CRM integration' checkbox is checked. There is a text input field for the 'CRM form action URL'. Below, there are five pairs of text input fields for adding additional CRM fields.

**Enable CRM integration**

**CRM form action URL:**

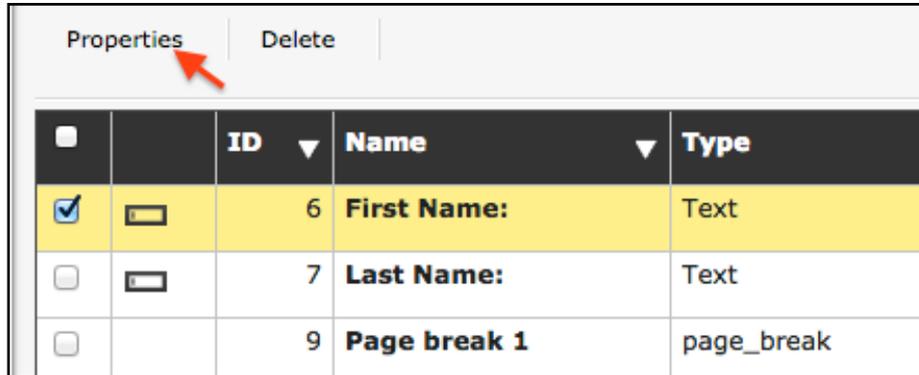
Use textboxes below to add additional CRM fields to the form when is submitted.

**Name / Value:**

Here you can enter the relevant URL and field information.

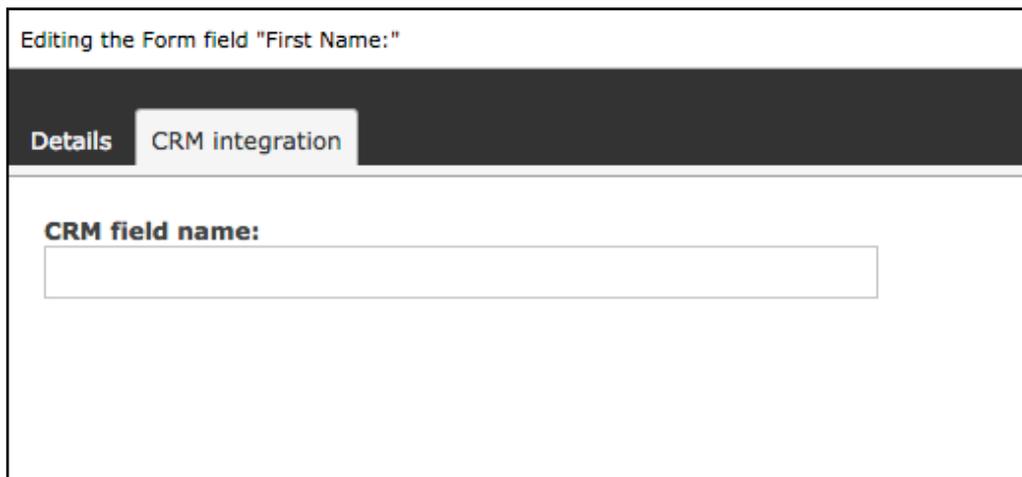
Then view the fields on your form.

Select a specific field and view the field properties.



		Properties		Delete	
<input type="checkbox"/>		ID ▼	Name ▼	Type	
<input checked="" type="checkbox"/>		6	First Name:	Text	
<input type="checkbox"/>		7	Last Name:	Text	
<input type="checkbox"/>		9	Page break 1	page_break	

The CRM integration tab will also be present. Fill in the appropriate field name to link to your CRM system.



Editing the Form field "First Name:"

Details CRM integration

**CRM field name:**