



Get to Know Forms: Beginner Session

Session Handout

FORM TEMPLATES

When creating a new form, you have the option to choose from a handful of pre-made form templates, use a form template that was created from one of your previously-created forms, or to start from scratch.

The screenshot shows a web interface titled "CREATE A FORM" with the question "What would you like to create?". On the left, there is a list of form templates: "Giving Form", "Contact Form", and "Event Registration". The "Event Registration" template is highlighted with a blue border. On the right, there is a "Form Preview" section showing a preview of the "Event Registration" form. The preview includes a title "Event Registration", a subtitle "New form description", and two input fields: "Email (optional)" and "Phone Number (optional)".

Pre-made form templates will have certain form fields already built for you, but you can always remove the fields that you do not need or add additional fields that will be necessary for your form.

Choosing a form template will automatically select a form category for you, as well. This can be important, as certain more advanced form functions rely on the form category that is chosen. If you change the type of form you're building, you can always change the form category from the General Info tab of the Form Properties.

FORM FIELDS

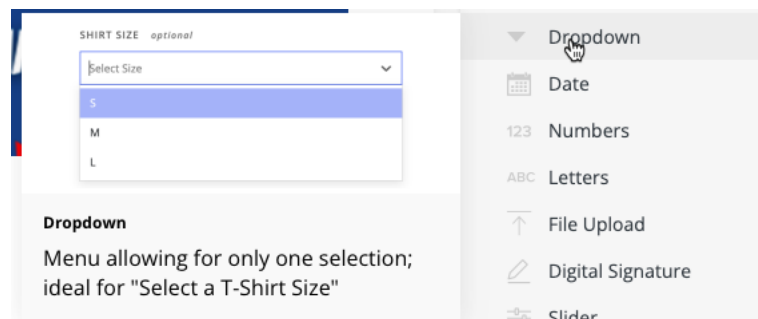
When building a form, use the Fields menu on the right side of the screen to capture information from the person submitting the form or enter information for the form.

Click a field to add it to the end of your form, or click to drag and drop the field where you would like it to go on the form.

There are five categories of Form Fields:

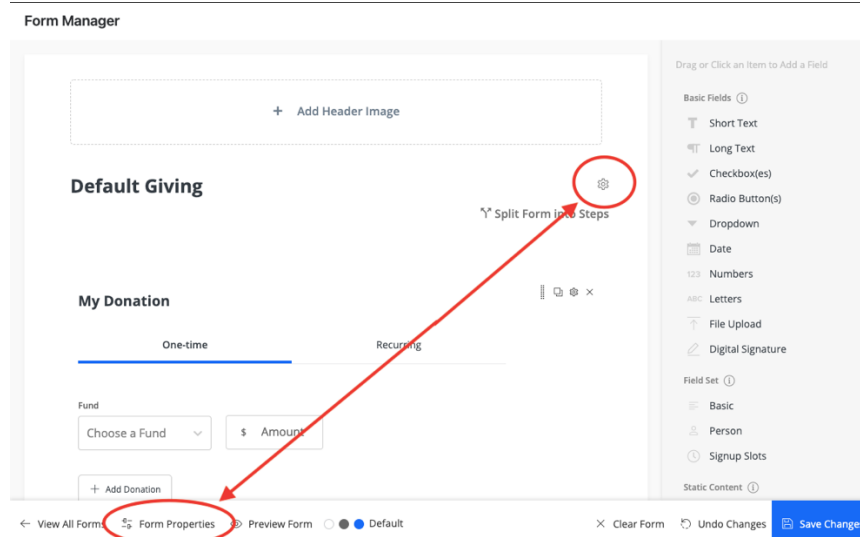
- **Basic Fields:** standard field types that are present on most forms
- **Field Sets:** collects a series of data points for multiple registrants within one form by allowing the registrant to **duplicate** the entire set of fields
- **Static Content:** used for aesthetic enhancement and for important information/descriptions
- **Contact Info Fields:** collect basic common contact information
- **Payment Fields:** display cost and accept a payment amount

Hover your mouse over a field for more information about how it can be used.



FORM PROPERTIES

Form Properties can be accessed in two places while viewing a form: by clicking Form Properties in the bottom menu or by clicking the settings gear icon near the top of the form builder.



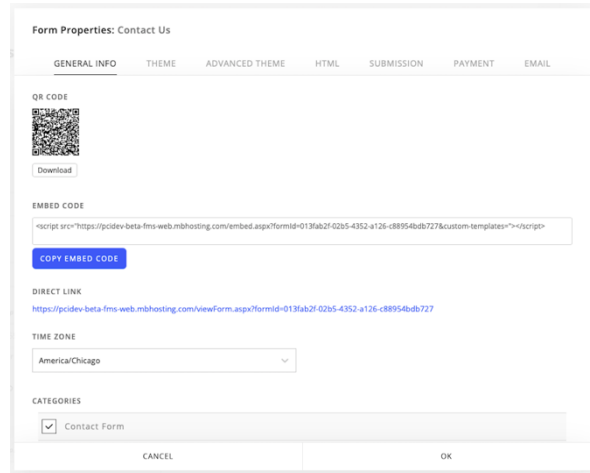
Form Properties include six tabs: General Info, Advanced Theme, HTML, Submission, Payment, and Email Notifications.

- **General Info** – Allows you to edit the name of the form and the description of the form, upload a header image for the form, adjust the timezone for your submissions, access the embed code or direct URL for the form, and adjust the form category.
- **Advanced Theme** – If the pre-made design themes aren't giving you your desired look, you can choose your own background colors, accent colors, and fonts within this tab.
- **HTML** – Can be used by those that are seasoned in writing their own website HTML code. Custom <head> code such as google analytics tracking can be included in this tab.
- **Submission** – This tab controls what message the user sees after they submit their form response, if they redirected to another page, and how many submissions one user can submit. Submissions is also where you can set a maximum amount of event registrations. You can also set a submission open date and a submission close date for your form, meaning no one can complete your form before or after those dates.
- **Payment** – These settings control various payment options for the people submitting the form.
- **Email Notifications** – This sets up an email notification or receipt to be received by givers, registrants, or even internal staff when the form is completed. The email body displays a custom message including the details of each user's form response.

WAYS TO SHARE YOUR FORMS

There are several ways to share those forms within each form's Properties under the General Info tab.

- Copy and use QR code.
- Use the embed code to add the form to your website.
- Copy and paste the direct link to share the form where needed.



The image shows a 'Form Properties: Contact Us' dialog box with several tabs: GENERAL INFO, THEME, ADVANCED THEME, HTML, SUBMISSION, PAYMENT, and EMAIL. The 'GENERAL INFO' tab is active. It contains a QR code with a 'Download' button below it. Below the QR code is an 'EMBED CODE' section with a text area containing a script tag and a 'COPY EMBED CODE' button. Below that is a 'DIRECT LINK' section with a text area containing a URL. Below the direct link is a 'TIME ZONE' dropdown menu set to 'America/Chicago'. At the bottom, there is a 'CATEGORIES' section with a checkbox for 'Contact Form' which is checked. At the very bottom are 'CANCEL' and 'OK' buttons.

VIEW FORM SUBMISSIONS AND EXPORT

On the main **Forms Manager** page, locate the **Responses** column. By clicking on the number of responses you will be directed to an internal spreadsheet of collected data. From there, you can export a CSV file (spreadsheet) of your responses to share or print by clicking the **Export as CSV** button in the bottom right corner.

Form Manager

Search by name

Status - 2 Selected

Category - All

CLEAR FILTERS

+ CREATE NEW FORM

NAME	CREATED	STATUS	RESPONSES	ACTIONS
Give Now - Central Campus	4/3/2020	✓ PUBLISHED	5 Responses +5	...
Kids Class Sign-Up Draft	2/27/2020	✓ PUBLISHED	18 Responses +16	...
Youth Retreat 2020	12/20/2019	✓ PUBLISHED	1 Response	...
Give Now - South Campus	12/20/2019	✓ PUBLISHED	41 Responses +38	...
Contact Us	10/17/2019	✓ PUBLISHED		...
Hope House	9/20/2019	✓ PUBLISHED		...
Leadership Conference	9/16/2019	✓ PUBLISHED	1 Response	...
Winter Storm Relief Fund	9/16/2019	✓ PUBLISHED		...