

Webform

CHECKLIST



*Webforms are located under Structure-->Webforms.
Here are things to know when completing a Webform.*

WEBFORM SETTINGS

- 1. Name the Webform** (Settings-->General): Avoid putting a date in the name so you can use the same form each year. Simply pull reports by date range.
- 2. Webform Description** (Settings-->General): Use the description field to remind you of what the form is about. Users do not see this description.
- 3. Webform Category** (Settings-->General): If you have a lot of Webforms then you should create categories to organize them. You can generate your own, which can be helpful.
- 4. Webform URL** (Settings-->General): By default, the webform URL is yourwebsiteaddress.org/form/name-form. If you want to override it you can use the space titled Webform URL alias. Only provide what you want after your domain URL. For example, instead of /form/golf-registration us /golf-reg.
- 5. Schedule the Webform** (Settings-->Form): You can schedule a Webform to publish and unpublish at an exact date and time.
- 6. Form Preview** (Settings-->Form): This allows the user to review their responses before submitting the form. It can be set as required, optional, or it doesn't have to be used at all.

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WEBFORM SETTINGS (CONTINUED)

- 7. Saving Draft** (Settings-->Submissions): Use if you need to allow the user to save a draft of the form in order to return to complete it. This feature does require users to have website user accounts.
- 8. Webform Autofill** (Settings-->Submissions): Use this feature for complex forms that repeat each year, such as funding applications. Enable the autofill feature in the "Submissions" tab by checking "Autofill with previous submission data" and selecting fields to prepopulate. Returning users will see forms pre-filled with their prior submissions.
- 9. Confirmation Message** (Settings-->Confirmation): Remember to set up the confirmation message that appears once the form is submitted. This lets the user know the form was successfully submitted. Typically, a "thank you."
- 10. Auto-Replies** (Settings-->Email/Handlers): You can set up multiple Email Replies with customized messaging. Emails can be conditional. For example, if user answers a question asking for information about volunteering, you can set a condition to email the volunteer coordinator a copy of that form. The "From" email address MUST use your specific domain.
- 11. Handlers** (Settings-->Email/Handlers): Note always needed, but there are a few Handlers you might use:
 - a. **Options/Checkbox Limit** - allows you to set limits for certain responses such as time slots and you can only take 3 per time slot.
 - b. **Stripe Handler** - for online payment transactions; must be configured to move money to your Stripe account.
- 12. Access** (Settings-->Access): Typically, forms are set for "anonymous" to access; however, sometimes a form is restricted to only users that have a specific type of account. Settings include: access to create, view, and edit.

BUILDING THE FORM

When Adding an Element to a form, use the "Search" at the top to find any of the following items quickly.

- 1. Page Wizard:** If you have multiple pages, be sure to add Wizard Pages and give them titles. Everything that is under that page must be indented under the Page Title (drag the crosshairs to the right).
- 2. Section Headers:** Consider organizing a form with Section Headers by using any of these elements: Field Set, Section, Container, or Advanced HTML.
- 3. Composite Fields:** A time saver that has several fields compiled together such as: Name, Contact, Address. You have options to turn the field on/off within a composite element and make them required.

BUILDING THE FORM checklist continued on next page

BUILDING THE FORM (CONTINUED)

- 4. Flexbox Layout:** This allows you to set fields side-by-side. Any fields indented under the Flexbox will be side-by-side. Each item under the Flexbox layout has a setting - by default the number is 1 but if you increase the number it will be larger.
- 5. Text Field:** Most common; used for a single line text answer.
- 6. Text Area:** Allows multiple lines of text. You can set how many rows of text and use "Validation" to set up a counter for number of words or characters.
- 7. Select / Select Other:** This is the drop-down list of choices, which are custom options available to select from.
- 8. Radios / Radios Other:** When you want the user to only select one option, there are custom choices such as yes/no, state, etc. You can set these to display in 1, 2, or 3 columns or side-by-side. Under advanced, you can select a default answer and also set the display to be "Form Element" instead of "Field Set" so that the font size adjusts to match the rest of the form.
- 9. Checkboxes / Checkboxes Other:** Use this when you want users to select as many as apply. Includes custom options. You can set these to display in 1, 2, or 3 columns or side-by-side. Under advanced, you can select a default answer and also set the display to be "Form Element" instead of "Field Set" so the font size adjusts to match the rest of the form.
- 10. Checkbox (different than Checkboxes):** This is a single checkbox that can be used for items such as acknowledgements or agreeing to terms & conditions.
- 11. Email:** This field must be used for email addresses. It is the field that is used to send out auto replies.
- 12. Phone Number:** Requires a full phone number.
- 13. Number:** Use this if you need a number response; this will not allow text responses. You can set maximum and minimum numbers.
- 14. Advanced HTML:** This is a rich text editor that allows you to type instructions, add a picture, and include a hyperlink inside the form.
- 15. Message:** This is also an HTML block but with a background color that makes it stand out.
- 16. Signature:** You can add a digital signature block to a form.
- 17. File:** Allows users to upload a picture or document. Be sure to set upload limits to 5MB or less to keep large files from being uploaded to your website.

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BUILDING THE FORM (CONTINUED)

- 18. Attachment PDF:** This doesn't appear on the form. It is actually a function that will generate a PDF of the submission.
- 19. Computed Twig:** Used to calculate different formulas applicable to the specific form (i.e. total donation amount or total cost for event registration). The OneEach team can assist you with setting up the Twig.
- 20. Stripe:** This adds a Stripe Payment processor to your form but only if you have Stripe configured on your website.
- 21. Submit Button:** This can be customized and you can have more than one submit button based on the conditions within the form.

FEATURES

- 1. Conditionals:** Every field has the option to be visible or invisible based on a response to a different question. For example, if someone answers 'Yes' to a field, then specific field(s) will suddenly appear for them to complete.
- 2. Required:** Mark any fields required that you want the user to complete before submitting the form.
- 3. Captcha / Security Questions:** To avoid spam, every form must have CAPTCHA. You can add a security question as well.
- 4. Webforms are Components:** Webforms can be added to any page on the website. The same form can even be added to multiple pages and still just have one single results page.
- 5. Results:** Each webform has its own results page. Go to the webform under Structure, Webforms. You can click on the "Results" number to get to the results page or select results under the dropdown. The layout of this page can be customized by you by clicking the "Customize" button on the right. Click "Download" to download the data as a CSV file. You can select what information to download and select by a date range.

FINAL THOUGHTS

Webforms are very powerful. Please reach out to your Account Manager for assistance in setting up a webform. In many cases we already have a webform designed that is similar to what you need. And we can clone it to your website for free!