



**Customize  
your form!**

**leadBase Software**

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# Welcome to leadBase Form Guide!

**We all want to have our own style to create a form that can be easily design. Now, You don't need CSS or custom code to do it. Let's explore some ways you can accomplish this.**

## Basic Form Editing

leadBase Form builder offers an impressive number of things you can alter directly in the Create form without using any custom code!



**Create Form**

# Where do I go to edit my form?

User can edit the form added by him and can also delete them.

- **Create Form:** This is where you get a clean canvas and can create your form by dragging & dropping buttons and fields.
- Your editing tools or form field options will be on the right-hand side of the screen.

# Add Form

User can add new form by adding form Title:

## ADD FORM

Form Title

This field is required.

- User can select **Lead Group** and **Site** from drop down with which he wants to link new form

Lead Group	<input type="text"/>
Site	<input type="text"/>

# Return URL

- Your Return URL will tell you where the page will redirect after acceptance and rejection of lead

## ADD FORM

Form Title

Lead Group

Site

Return URL

# Status and General Fields

- Change form status according to your need (active or inactive).
- You can now add fields of your own choice on form by check marks.

Status	<input checked="" type="radio"/> Active <input type="radio"/> Inactive		
General Fields	<input type="checkbox"/> Include Title Field	<input checked="" type="checkbox"/> Include First Name Field	<input checked="" type="checkbox"/> Include Last Name Field
	<input checked="" type="checkbox"/> Include Email Field	<input type="checkbox"/> Include DOB Field	<input checked="" type="checkbox"/> Include Phone Field
	<input type="checkbox"/> Include Fax Field	<input type="checkbox"/> Include ZIP Field	<input type="checkbox"/> Include Address Field
	<input type="checkbox"/> Include City Field	<input type="checkbox"/> Include Company Field	<input type="checkbox"/> Include Designation Field
	<input type="checkbox"/> Include Ask Contact Time Field	<input type="checkbox"/> Include Ask Contact on Phone Field	<input type="checkbox"/> Include Ask Contact on Email Field
	<input type="checkbox"/> Include Ask Contact on Fax Field		



# Drag & Drop to customize your own Form

Drag a field from the right to this area

Button

Checkbox Group

Date Field

Header

Hidden Input

Paragraph

Number

Radio Group

Select

Text Field

Text Area

Clear

Get HTML

Cancel

Continue

- ◉ **Select List:** Select List is used to create a list of items that you want a user to choose from. You can either use a predefined list or create your own list from scratch. Drag Select from right and drop it on form wherever you want to.

The screenshot displays a form builder interface. On the left, a dashed box contains a 'Select' dropdown menu. The dropdown is open, showing a list of options: 'Option 1', 'Option 2' (which is highlighted in blue), and 'Option 3'. The dropdown is currently set to 'Option 2'. On the right side of the interface, there is a vertical list of form components. These components include: 'Button', 'Checkbox Group', 'Date Field', 'Header', 'Hidden Input', 'Paragraph', 'Number', 'Radio Group', 'Select', 'Text Field', and 'Text Area'. The 'Select' component is highlighted with a red rectangular border, indicating it is the selected element for the form.

- ◉ **Radio Group:** Radio group field is used when you have a field that has several answer options, but you only want users to be able to select one of those options. Label will change the name of field. If you want to more than 3 options, you can add from “Add option”.

Radio Group

The screenshot shows a configuration form for a 'Radio Group' field. The form includes several sections: 'Required' with a checkbox, 'Label' with a text input containing 'Radio Group' (highlighted with a red box), 'Help Text' with a text input, 'Inline' with a checkbox and 'Display radio inline' label, 'Class' with a text input containing 'space separated classes', 'Name' with a text input containing 'radio-group-1511250434128', 'Access' with a checkbox and 'Limit access to one or more of the following roles:' label, and 'Enable "Other"' with a checkbox and 'Let users to enter an unlisted option' label. Below these is an 'Options' section with a table of three options. Each option has a radio button, a text input for the label, and a text input for the value. The second option is selected. At the bottom right of the 'Options' section is a button labeled 'Add Option +' (highlighted with a red box).

Options	Label	Value
<input type="radio"/>	Option 1	option-1
<input checked="" type="radio"/>	Option 2	option-2
<input type="radio"/>	Option 3	option-3

Add Option +

- ◉ **Date Field:** Exactly what you think it is. A place for your users to enter either a date, time or both. An example would be if you needed the user's date of birth.

Date Field

mm/dd/yyyy

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Sun	Mon	Tue	Wed	Thu	Fri	Sat
29	30	31	1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	1	2

Button

Checkbox Group

Date Field

Header

Hidden Input

Paragraph

Number

Radio Group

Select

Text Field

Text Area

- **Button:** You can add button of your need and edit its title from Label and can also change the color of that button in your form e.g. Submit button as follows

The screenshot displays a form configuration interface. On the left, a panel titled 'Submit' contains fields for editing a button: 'Label' (set to 'Submit'), 'Type' (set to 'Button'), 'Style' (with options: Default, Danger, Info, Primary, Success, Warning), 'Class' (set to 'btn btn-danger'), 'Name' (set to 'button-1511249523123'), and 'Value' (set to 'Value'). An 'Access' section has a checkbox for 'Limit access to one or more of the following roles:'. A 'Close' button is at the bottom of this panel. A red box highlights the 'Label' field, and a red arrow points from the 'Button' option in the right-hand menu to it. The right-hand menu lists various form elements: Button, Checkbox Group, Date Field, Header, Hidden Input, Paragraph, Number, Radio Group, Select, Text Field, and Text Area. Below the configuration panel, a red 'Submit' button is shown as a preview.

- **Header:** Header is used to add a new heading to your form. You can edit it by adding its Label. As shown below. User changed the Header to Details and set type and class according to its need

The screenshot displays a form editor interface. On the left, a configuration panel for a widget is shown. The 'Label' field is set to 'Details' and is highlighted with a red box. A red arrow points from the 'Header' widget in the right-hand palette to this 'Label' field. The 'Type' dropdown is set to 'h2'. The 'Class' dropdown is set to 'h2' and is highlighted with a blue selection bar. The 'Access' section has a checkbox for 'Limit access to one or more of the following roles:' which is currently unchecked. A 'Close' button is at the bottom of the configuration panel. On the right, a vertical palette lists various form widgets: Button, Checkbox Group, Date Field, Header (highlighted with a red box), Hidden Input, Paragraph, Number, Radio Group, Select, Text Field, and Text Area.

- **Number:** Allows your user to enter a number. Useful for currency amounts.

The image shows a form builder interface. On the left, a form is being constructed within a dashed rectangular container. At the top left of this container is a label 'Number'. Below the label is a text input field containing the number '4'. This input field is highlighted with a red rectangular border. To the right of the form container is a vertical palette of form components. The components listed are: Button, Checkbox Group, Date Field, Header, Hidden Input, Paragraph, Number, Radio Group, Select, Text Field, and Text Area. The 'Number' component, represented by a hash symbol (#), is highlighted with a red rectangular border.

- **Text Area:** Here is where you can insert rich text. This field is for adding place holder, help text, access to how many users and specially formatted information for your users etc. You can make this field required as well.

Text Area

Required ☐

Label

Help Text

Placeholder

Class

Name

Access ☐ Limit access to one or more of the following roles:

Value

Type

Max Length

Rows

Close

Button

Checkbox Group

Date Field

Header

Hidden Input

Paragraph

Number

Radio Group

Select

Text Field

**Text Area**

Clear

Get HTML



- **Get HTML:** This field allows you to embed HTML into the form and also you can copy it.

## Form HTML

```
<form id="lead-generation-form" class="form-horizontal"
action="http://server.arhamsoft.com/leadbase/lead-post-api"
method="POST"><input type="hidden" name="lead_group_id"
value="14"><input type="hidden" name="site_id" value="2"><input
type="hidden" name="return_url" value="arooj.aslam"><input
type="hidden" name="unique_code"
value="8e3558366e71ccc7f9f9ff17"><div class="form-group">
<label class="control-label" for="first_name">First Name <small
class="text-danger">*</small></label><div class="col-sm-12 row">
<input type="text" class="form-control" name="first_name"
id="first_name" placeholder="Enter First Name" required/></div>
</div><div class="form-group"><label class="control-label"
for="last_name">Last Name <small class="text-danger">*</small>
</label><div class="col-sm-12 row"><input type="text" class="form-
control" name="last_name" id="last_name" placeholder="Enter Last
Name" required/></div></div><div class="form-group"><label
```

Yes, copy it!

Button

Checkbox Group

Date Field

Header

Hidden Input

Paragraph

Number

Radio Group

Select

Text Field

Text Area

Clear

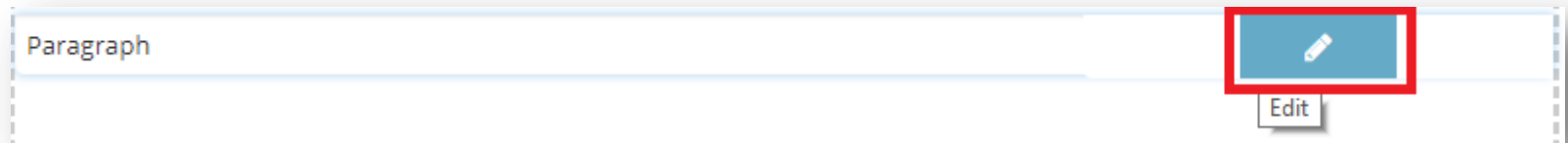
Get HTML

# Changing Label on Fields

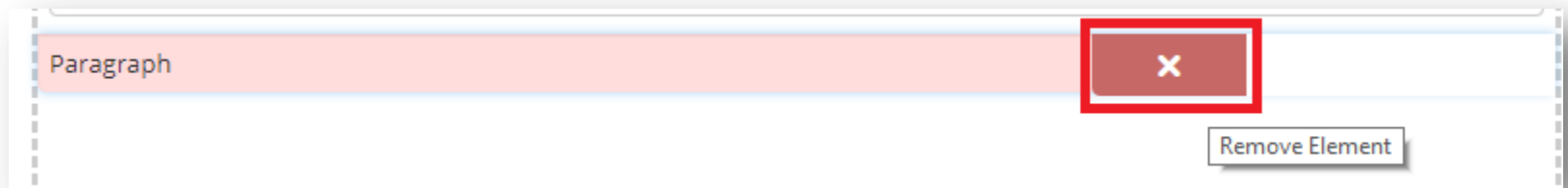
- You can **drag & drop** the field from the list of form fields on the **right side** of your blank form.
- **Once the field is open, double click it within the field, and it will prompt you to change the label.**

# Edit, Remove & Copy

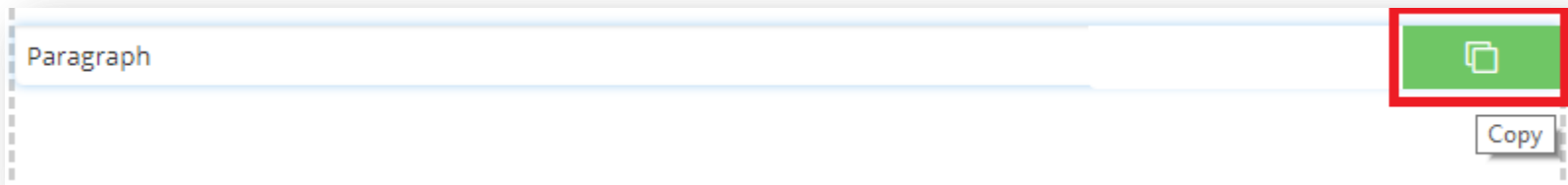
- On right side of any specific field, you can see three options.
- Edit, Remove and Copy.
- You can **Edit** any field by clicking edit option (Like this)



- You can **Remove** any field by clicking Remove option (Like this)



- You can **Copy** any field by clicking copy option (Like this)





From our **blog** to our **support** team, we're here for you if and when you need us! **it's time to make your own form. Ready, set, customize!**