

NetForum Form Extensions – Lab Guide

Purpose

Utilize baseline form extensions to enhance the customization of iWeb forms in NetForum.

Requirements

- Attendees are required to bring their own laptop to follow the hands-on exercises.
- WIFI – You need an internet connection.
- Access to a NetForum training site.
 - Site URL: <https://train06.netforum.com/nftstrain2017/iWeb>
 - Username: student + Student ID + “_train”.
 - Example: student01_train
 - Password: Abila4u

Tips

- To ensure each student has its own setup many of records you create must follow a strict naming convention. We recommend you follow the recommended names and replace the student ID with the number given to you.
- To help with sorting use your student ID with two digits, i.e. “01” instead of “1”.
- Keep this document open and copy and paste as needed.
- NetForum Extensions Help Page
 - <https://nfesupport.zendesk.com/hc/en-us/articles/10639101899661-Form-Extension>
- Step 1 and 3 Images repeat on each task.

Tasks

Task 1: Add ExecuteSQL Extension

Baseline extension method that executes a SQL query. Commonly used in BeforeSave and AfterSave methods to add form validation or insert records into a table. For this example, we will create a simple ExecuteSQL form extension that requires a user to check a Terms and Conditions checkbox on the form before they can successfully save the form.

Main area: Toolkit/ Forms / Form

Step	Action	Result
1	Goto Toolkit -> Find Object	The find object form displays
2	Enter c02 into Prefix and Click Go	The object profile page displays
3	In the Forms ChildForm click the green Goto arrow next to the form with your student number	The form profile page displays
4	On the primary tab and extensions childform click the plus to add a new extension.	The add form extension page displays

5	<p>Enter the following values:</p> <ul style="list-style-type: none"> • description = AV Require Terms Extension • control class = Div • control id = divRequireTermsExtension{Your First Name}{Your Last Initial} <ul style="list-style-type: none"> ○ Do not type the curly braces • control text = AV Require Terms Extension • object assembly = data • object typename = Avecetra.netForum.Data.DataUtils • • Before save method/parameters: <ul style="list-style-type: none"> ○ ExecuteSql ○ String: if('{CHECKBOX_0}' IN ('','0')) RAISERROR ('Please agree to terms.', 16, 1) <ul style="list-style-type: none"> ▪ Generic checkbox values are blank value or 'on'. ▪ Facade checkboxes are 1 or 0. ▪ We can check for both in our SQL to be safe. <p>Click Save</p>	The form extension saves and returns to the form profile page.
6	Click UI -> Form Designer	Classic Form Designer displays
7	Click Extension Controls on the Left Drag and drop your new extension on to the form in any row.	Extension will display in the row you dragged it into
8	Click Save and Close Checkmark in the top left	The designer will save and close
9	Goto Modules -> TK Train xperience24 -> AV Club Member -> List AV Club Member	The List AV Club Member page displays
10	Click Green GoToArrow to select any club member	The edit av club member page displays

11	Make sure the checkbox “Do You Agree to Terms and Conditions” is unchecked. Click Save in the upper right	Your extension validation should run and display the error you put in since the checkbox is not checked
12	Check the checkbox “Do You Agree to Terms and Conditions” Click Save in the upper right	Your extension should run and not display an error to the user. The form should be saved successfully.

Step 1 Image

Toolkit / Object / Find - Object

Find - Object

☐ Advanced View

Object Display Name:

Object Class Name:

Assembly:

Type Name:

Has Related Objects?: ☐

Prefix:

Unique Key:

Supports Correspondence: ☐

Async Save Flag: ☐

☒ Edit table list setup

Go Cancel

Step 3 Image

Toolkit / Object / object - AVClubCustomer

Search

Object

AV Club Customer

Class Name: AVClubCustomer

Prefix: c02

Default Columns: c02_completed_flag,c02_end_date,c02_start_date,c02_fee,c02_add_user,c02_points

Default Order By: cst_sort_name,dn,c01_code,IsNull(c02_change_date,c02_ad d_date) desc

Object Properties

Has Related Objects?: No

Has Extension Controls?: No

Supports Correspondence?: Yes

Supports Workflow?: Yes

Display Mass Replace Link?: No

Content Group:

Primary Reports

Data objects

Search

DESCRIPTION	FOREIGN KEY	PREFIX	TABLE	KEY	READ-ONLY?	1:MANY?
AV Club Customer	c02		client_av_club_x_customer	c02_key		
Av Club	c02_c01_key	c01	client_av_club	c01_key	✓	
Customer	c02_cst_key	cst	co_customer	cst_key	✓	

Forms

Search

GOTO	DYN_KEY	DESCRIPTION	CHILD FORMS	DESIGNED?	P
254a65fb-868f-45a1-9795-adcdd5e7923d		AV Club Member Trainer rrice_avctr	0	✓	

Step 5 Image

Form Extension

object (all forms): Please select
 form: AV Club Member Ryan R
 description: AV Require Terms Extension
 order:
 control class: Div
 control id: divRequireTermsExtension
 control text: AV Require Terms Extension
 control tool tip:

.net Assembly And Typename

object assembly: data example: ABCEExtension
 object typename: Auctra.netForum.Data.DataUtils

Form Extension Events Method And Parameter

initialize method/parameters:
 load method/parameters:
 before save method/parameters: ExecutesSql
 String: if('{CHECKBOX_0}' IN ('','0')) RAISERROR ('Please agree to terms', 16, 1)
 after save method/parameters:
 postback method/parameters:
 html onclick:

save mode: Update ☐ Metadata Lock ☐ hide/disable record?
 created: rrice_avctr-7/18/2024 3:31:59 PM
 updated: rrice_avctr-7/18/2024 3:47:38 PM

Save Delete Cancel

Steps 7 and 8 Image

Action Controls Page

Gallery **Save and Close**

HTML
 Advanced
 Extension Controls
☐ AV Require Terms Extension
☒ AV Club Customer
☐ AV Club
☐ Customer

Form Designer

LEGEND
 Club Member

DROPDOWNLIST club key: LABEL club:*

LABEL name:* TEXTBOX customer sort name:

DATETEXTBOX start date: LABEL start date:

DATETEXTBOX end date: LABEL end date:

Steps 9 and 10 Image

TK Train xperience24

TK Train xperience24 / AV Club Member / List AV Club Member

AV Club Member

List AV Club Member

List AV Club Member

Search

10

<input type="checkbox"/>	GOTO	NAME	CLUB	START DATE
<input type="checkbox"/>		Allen Anna	Ping Pong	2024-07-01
<input type="checkbox"/>		Allen Anna	Soccer	2024-07-11
<input type="checkbox"/>		Allen Anna	Soccer	2024-07-16
<input type="checkbox"/>		Allen Anna	Soccer	2024-07-01
<input type="checkbox"/>		Cork Arlene	Soccer	2024-07-02

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Step 11 Image

Error: Please agree to terms

Details >>

Edit AV Club Member Ryan R

Club Member

Club:

Ping Pong

Name:

Allen Anna

End Date:

7/31/2024

Fee:

10.00

☐ Do You Agree To Terms And Conditions?

Unchecked

Error: Please agree to terms

Details >>

Task 2: Add Send Template Extension

Baseline extension method that sends an email to the individual, organization, or chapter. The email is sent to the Customer’s primary email address (cst_eml_address_dn). In this task we will add a new form extension and send an email using a predefined template.

Main area: Toolkit/ Forms / Form

Step	Action	Result
1	Goto Toolkit -> Find Object	The find object form displays
2	Enter c02 into Prefix and Click Go	The object profile page displays
3	In the Forms ChildForm click the green Goto arrow next to the form with your student number	The form profile page displays
4	On the primary tab and extensions childform click the plus to add a new extension.	The add form extension page displays

5	<p>Enter the following values:</p> <ul style="list-style-type: none"> • description = AV Send Template Extension • control class = Div • control id = divSendTemplateExtension{Your First Name}{Your Last Initial} <ul style="list-style-type: none"> • Do not type the curly braces • control text = AV Send Template Extension • object assembly = extension • object typename = Avectra.netForum.Extension.Utility • • After save method/parameters: <ul style="list-style-type: none"> • SendTemplate • Page:Page;Control:Control;String:6ce2a679-63c0-4f06-b2bf-2358666d9ef2 <p>Click Save</p>	The form extension saves and returns to the form profile page.
6	Click UI -> Form Designer	Classic Form Designer displays
7	Click Extension Controls on the Left Drag and drop your new extension on to the form in any row.	Extension will display in the row you dragged it into
8	Click Save and Close Checkmark in the top left	The designer will save and close
9	Goto Modules -> TK Train xperience24 -> AV Club Member -> List AV Club Member	The List AV Club Member page displays
10	Click Green Goto Arrow to select any club member	The edit av club member page displays
11	Check the checkbox “Do You Agree to Terms and Conditions” Click Save in the upper right	Your extension validation should run and send an email to the primary email for the customer you are on.
12	Goto CRM Module -> Individuals -> List Individuals Click the green goto arrow on Anna Allen’s record	Anna Allen profile page displays

13	Click the “More” tab on the right Click “Correspondence” item On the “Communications” childform verify your email was sent by checking the date is today’s date and the sent by is your logged in student account.	Communications child form displays
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Step 5 Image

Form Extension

object (all forms): Please select

form: AV Club Member Ryan R

description: AV Send Template Extension

order:

control class: Div

css class:

control id: divSendTemplateExtensionRyanR

control text: AV Send Template Extension

control tool tip:

Get Assembly And Typename

object assembly: extension example: ABCExtension

object typename: Auctra.netForum.Extension.Utility

Form Extension Events Method And Parameter

initialize method/parameters:

load method/parameters:

before save method/parameters:

after save method/parameters: SendTemplate
Page:Page;Control:Control;String:6ce2a679-63c0-4f06-b2bf-2358666d9ef2

postback method/parameters:

html onclick:

ADVANCED

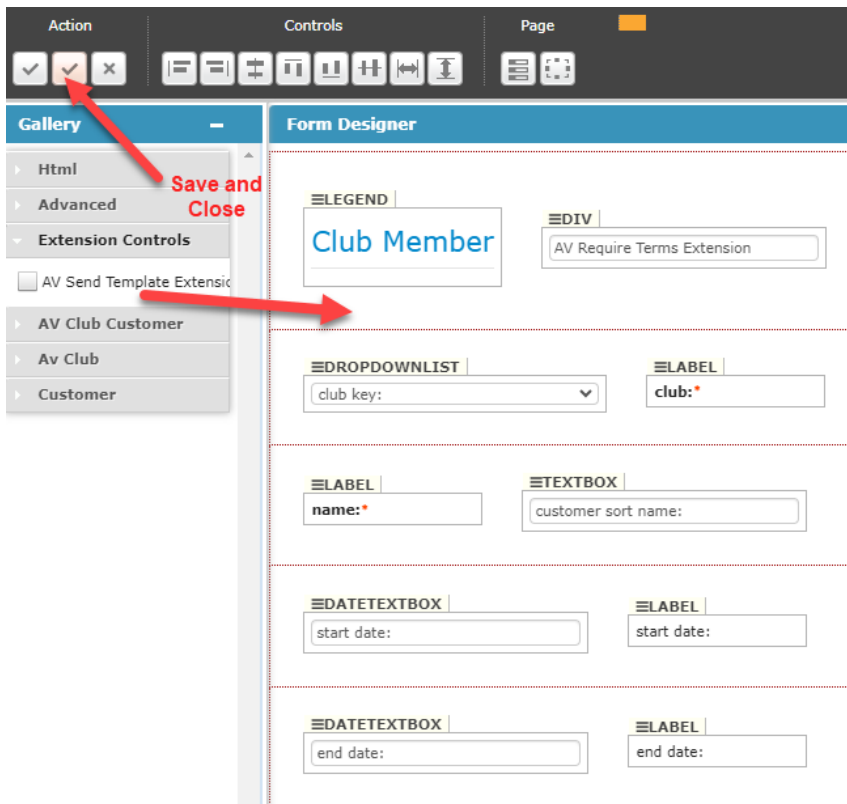
save mode: Update ☐ Metadata Lock ☐ hide/disable record?

record information

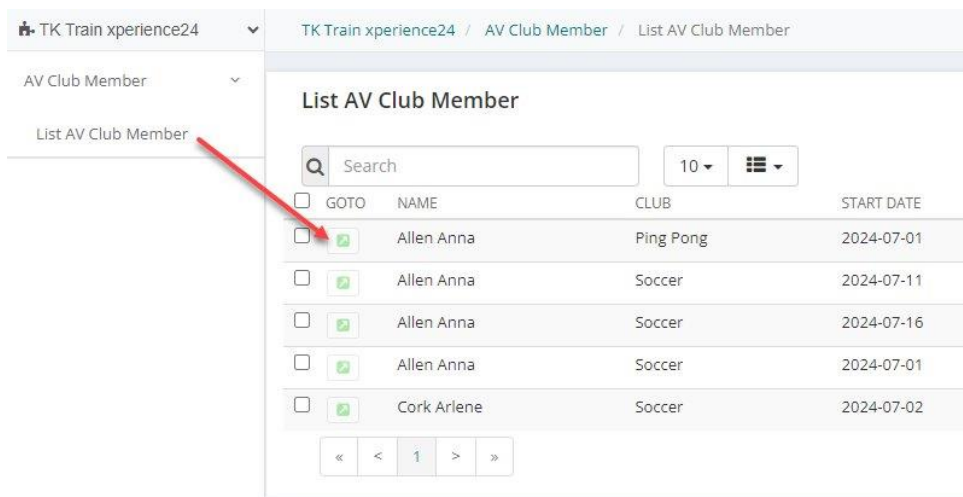
created: rrice_avctr-9/14/2024 2:39:18 PM
updated: rrice_avctr-9/14/2024 3:25:40 PM

Save Delete Cancel

Steps 7 and 8 Image



Steps 9 and 10 Image



Step 11 Image

CRM / [Assignment Role](#) / Edit AV Club Member Ryan R

Edit AV Club Member Ryan R

Club Member

Club: Ping Pong **Name:** Allen Anna

End Date: 7/31/2024 **Fee:** 10.00

☒ Do You Agree To Terms And Conditions?

Step 13 Image

CRM / [Individuals](#) / Anna Allen

Search

1 of 40 Results

A high priority note has been added

Home Add Edit Links Report

Correspondence Membership Relations Contact info Events Committees Awards Scoring more

Communications

Search

DATE	ACTIVITY	DESCRIPTION/SUBJECT	METHOD	SENT BY	ACTIONS
2024-09-14	Confirmation Sent	Your club record has been updated.	E-mail	rrrice_avctr	resend confirmation

Task 3: Add Redirect After Save Extension

Baseline extension method that upon saving the form, redirects the user to the appropriate page in NetForum. Used as an alternate solution to creating a one-page wizard in NetForum.

Main area: Toolkit/ Forms / Form

Step	Action	Result
1	Goto Toolkit -> Find Object	The find object form displays
2	Enter c02 into Prefix and Click Go	The object profile page displays
3	In the Forms ChildForm click the green Goto arrow next to the form with your student number	The form profile page displays
4	On the primary tab and extensions childform click the plus to add a new extension.	The add form extension page displays

5	<p>Enter the following values:</p> <ul style="list-style-type: none"> • description = AV Redirect After Save Extension • control class = Div • control id = divRedirectAfterSaveExtension{Your First Name}{Your Last Initial} <ul style="list-style-type: none"> • Do not type the curly braces • control text = AV Redirect After Save Extension • object assembly = extension • object typename = Avectra.netForum.Extension.Utility • After save method/parameters: <ul style="list-style-type: none"> • RedirectAfterSave • Page:Page;Control:Control;String:DynamicProfile.aspx?FormKey=b772881d-d704-40f3-92b6-09b13a50fcc9&key={c02_cst_key} <p>Click Save</p>	The form extension saves and returns to the form profile page.
6	Click UI -> Form Designer	Classic Form Designer displays
7	<p>Click Extension Controls on the Left</p> <p>Drag and drop your new extension into the form, placing it in a row after your other 'after save' extensions. Otherwise, it will redirect before the other extensions are executed.</p>	Extension will display in the row you dragged it into
8	Click Save and Close Checkmark in the top left	The designer will save and close
9	Goto Modules -> TK Train xperience24 -> AV Club Member -> List AV Club Member	The List AV Club Member page displays
10	Click Green Goto Arrow to select any club member	The edit av club member page displays
11	<p>Check the checkbox "Do You Agree to Terms and Conditions"</p> <p>Click Save in the upper right</p>	Your extension should run and redirect you to the individual profile page.

Step 5 Image

Form Extension

object (all forms): Please select
form: AV Club Member Ryan R
description: Av Redirect After Save Extension
order:
control class: Div css class:
control id: divRedirectAfterSaveExtensionRyanR
control text: Av Redirect After Save Extension
control tool tip:
.net Assembly And Typename
object assembly: extension example: ABCExtension
object typename: Avectra.netForum.Extension.Utility
Form Extension Events Method And Parameter
initialize method/parameters:
load method/parameters:
before save method/parameters:
after save method/parameters: RedirectAfterSave
Page:Page;Control:Control;String:DynamicProfile.aspx?FormKey=b772881d-d704-40f3-92b6-09b13a50fcc9&key={c02_cst_key}
postback method/parameters:
html onclick:
ADVANCED
save mode: Update ☐ Metadata Lock ☐ hide/disable record?
created: rrice_avctr-9/14/2024 3:06:22 PM
Save Delete Cancel

Steps 7 and 8 Image

Action **Controls** **Page**

Gallery

- Html
- Advanced
- Extension Controls
 - Av Redirect After Save Extension
- AV Club Customer
- Av Club
- Customer

Form Designer

LEGEND

- Club Member
- DIV: AV Require Terms Extension
- DROPDOWNLIST: club key:
- LABEL: club:*
- LABEL: name:*
- TEXTBOX: customer sort name:
- DATETEXTBOX: start date:
- LABEL: start date:

Steps 9 and 10 Image

TK Train xperience24

AV Club Member

List AV Club Member

TK Train xperience24 / AV Club Member / List AV Club Member

List AV Club Member

Search

10

<input type="checkbox"/>	GOTO	NAME	CLUB	START DATE
<input type="checkbox"/>		Allen Anna	Ping Pong	2024-07-01
<input type="checkbox"/>		Allen Anna	Soccer	2024-07-11
<input type="checkbox"/>		Allen Anna	Soccer	2024-07-16
<input type="checkbox"/>		Allen Anna	Soccer	2024-07-01
<input type="checkbox"/>		Cork Arlene	Soccer	2024-07-02

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Step 11 Image

CRM / Assignment Role / Edit AV Club Member Ryan R

Edit AV Club Member Ryan R

Club Member

Club:

Ping Pong

Name:

Allen Anna

End Date:

7/31/2024

Fee:

10.00

☒ Do You Agree To Terms And Conditions?