FORM BUILDER
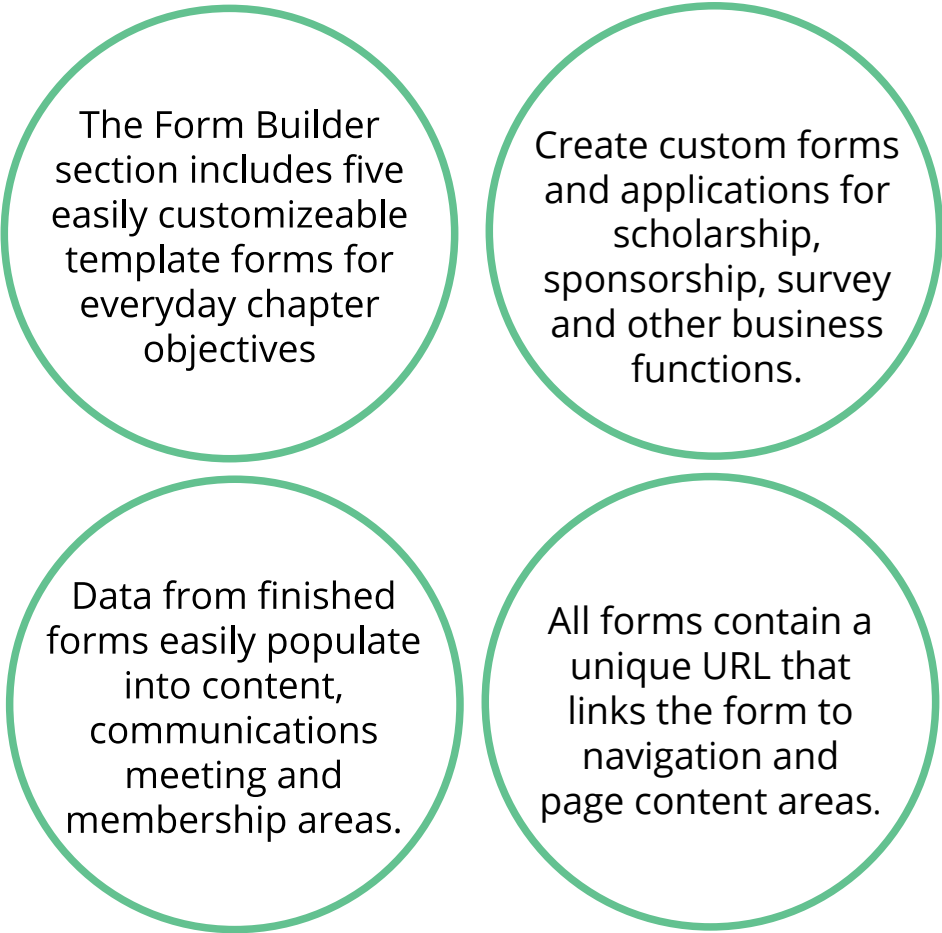
StarChapter allows chapter leaders to build forms via the admin area. It is easy to publish the form to the website or send it via email to both members and non-members.

The Form Builder section includes five easily customizeable template forms for everyday chapter objectives

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Videos
How to Use Form Builder for Classified Ads

Industry Best Practices

- Conversion and Forms - Best Practices
- General Formatting Tips for Setting Up A Form
- Setting up a form with mobile devices in mind

Setup Popular Forms - Admin and Front-End Experience

Click on a task to learn more about setting up a form.
  - Member and Prospect Applications
  - **Job Listings** and Postings
  - Sponsor and Business Partner Applications
  - Scholarship Applications

From Admin Area to Front-End

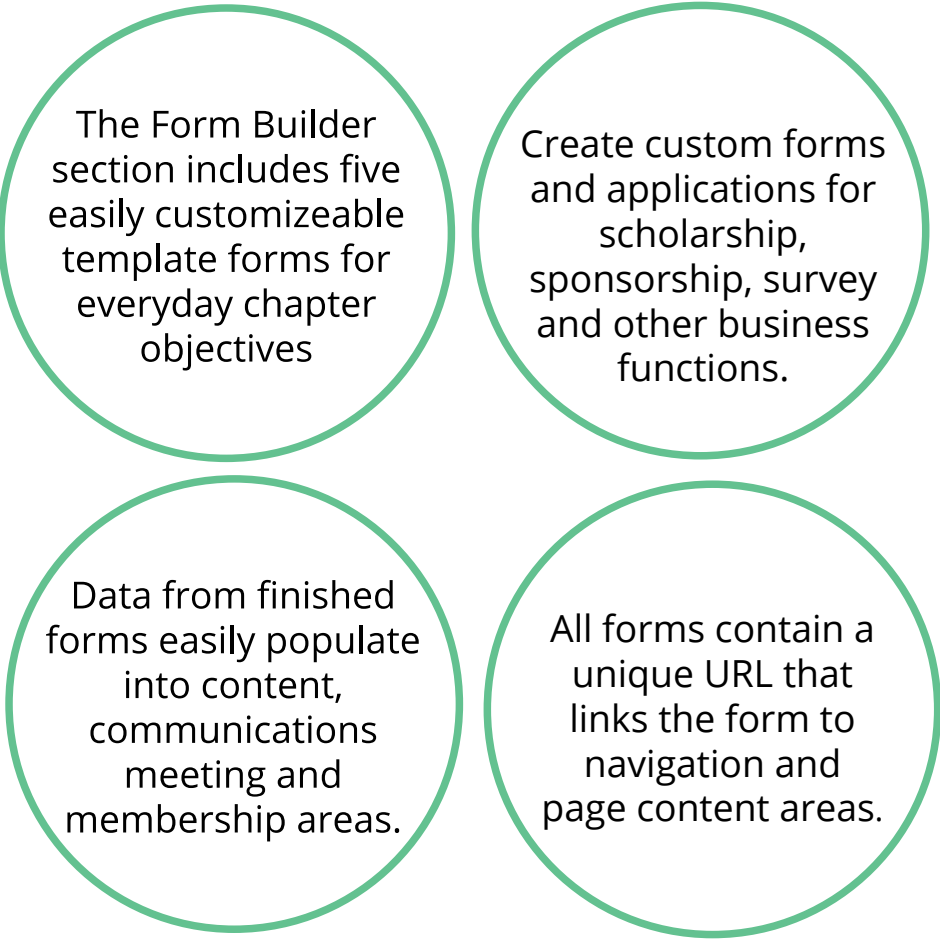| Navigation Manager |
|---|
| Page Content |
| Email Manager |

Inside Form Builder

General Information
Build Form - Question Types
Thank You Messages

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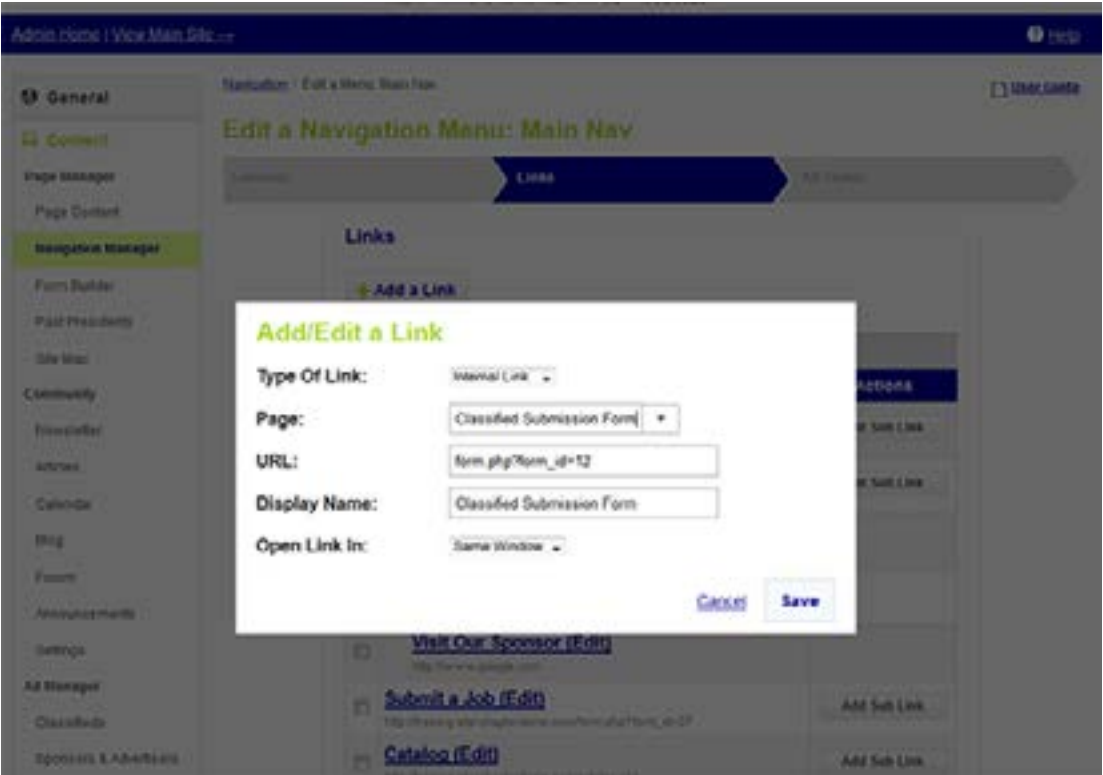
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From Admin Area to Front-End

Navigation Manager

1. Forms are automatically saved as **Internal Links**, and the links are accessible by going to Content > Page Manager > Navigation Manager.
2. Type in the name of the form, and it will automatically populate in the **Page**. The **URL** will also automatically populate based on the page.
3. The **Display Name** is what will show up on the front-end of the website.
4. **Open Link In** allows the user to stay within the website with 'Same Window'. A new web page will open with 'New Window'.
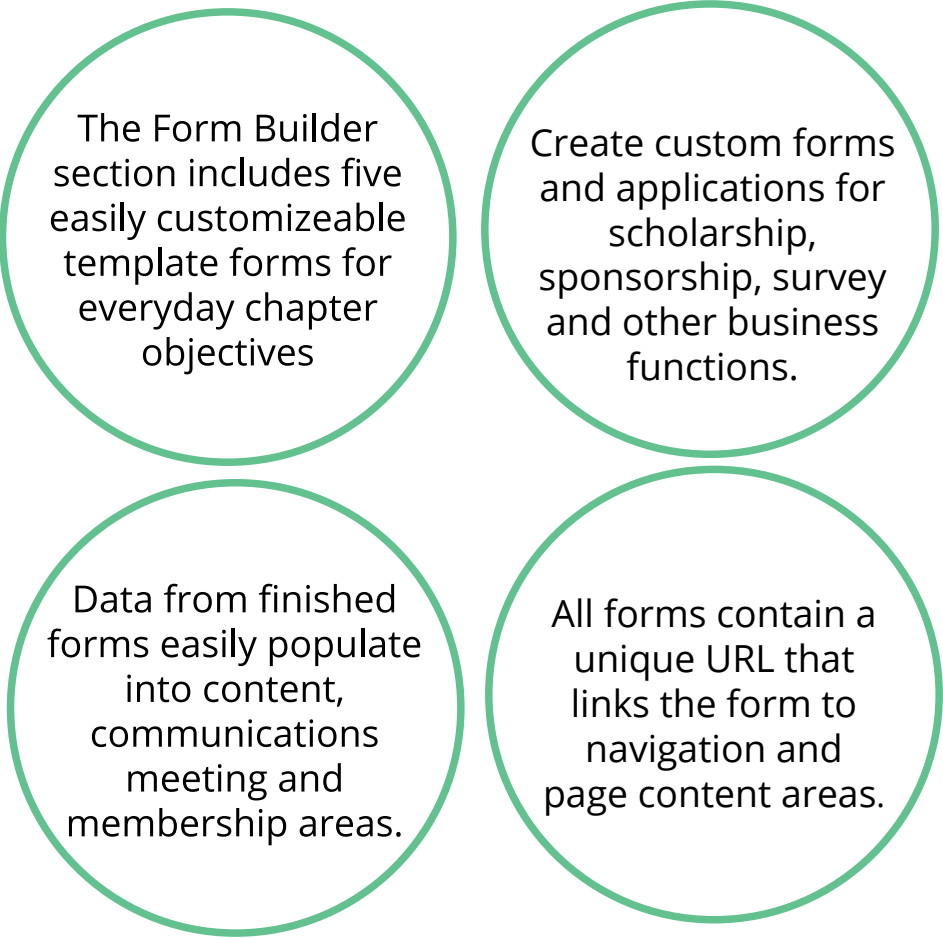
Once these steps are completed, the form will then be available within a navigation area of the website.

Page Content

Email Manager

Form Builder

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From Admin Area to Front-End

Navigation Manager
Page Content

After completing a form, a URL is automatically generated. This makes it easy to publish the link on a content page via Content > Page Content.
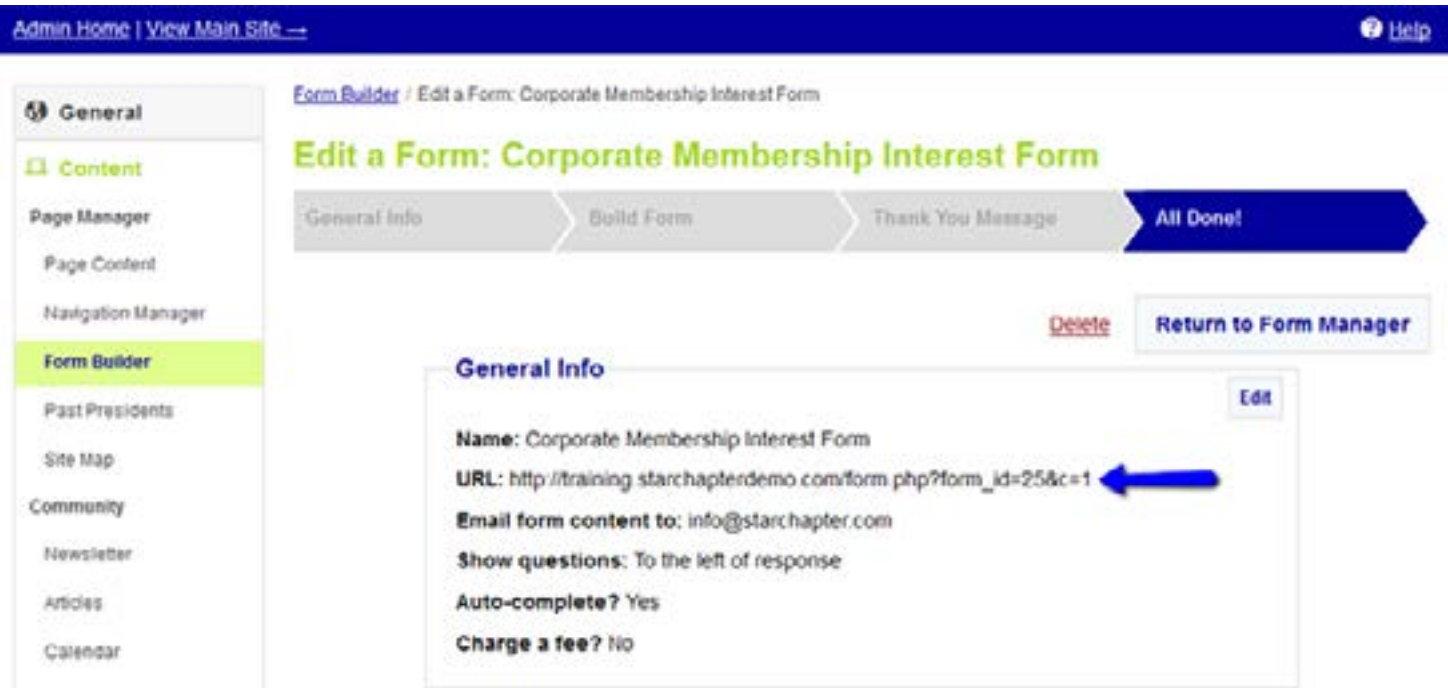
Admin Home	View Main Site →		Help

General
Content
Page Manager
Page Content
Navigation Manager
Form Builder
Past Presidents
Site Map
Community
Newsletter
Articles
Calendar

Form Builder / Edit a Form: Corporate Membership Interest Form

Edit a Form: Corporate Membership Interest Form

General Info   Build Form   Thank You Message   **All Done!**

Delete   Return to Form Manager

General Info   Edit

Name: Corporate Membership Interest Form
URL: http://training.starchapterdemo.com/form.php?form_id=25&c=1
Email form content to: info@starchapter.com
Show questions: To the left of response
Auto-complete? Yes
Charge a fee? No

Email Manager

Inside Form Builder

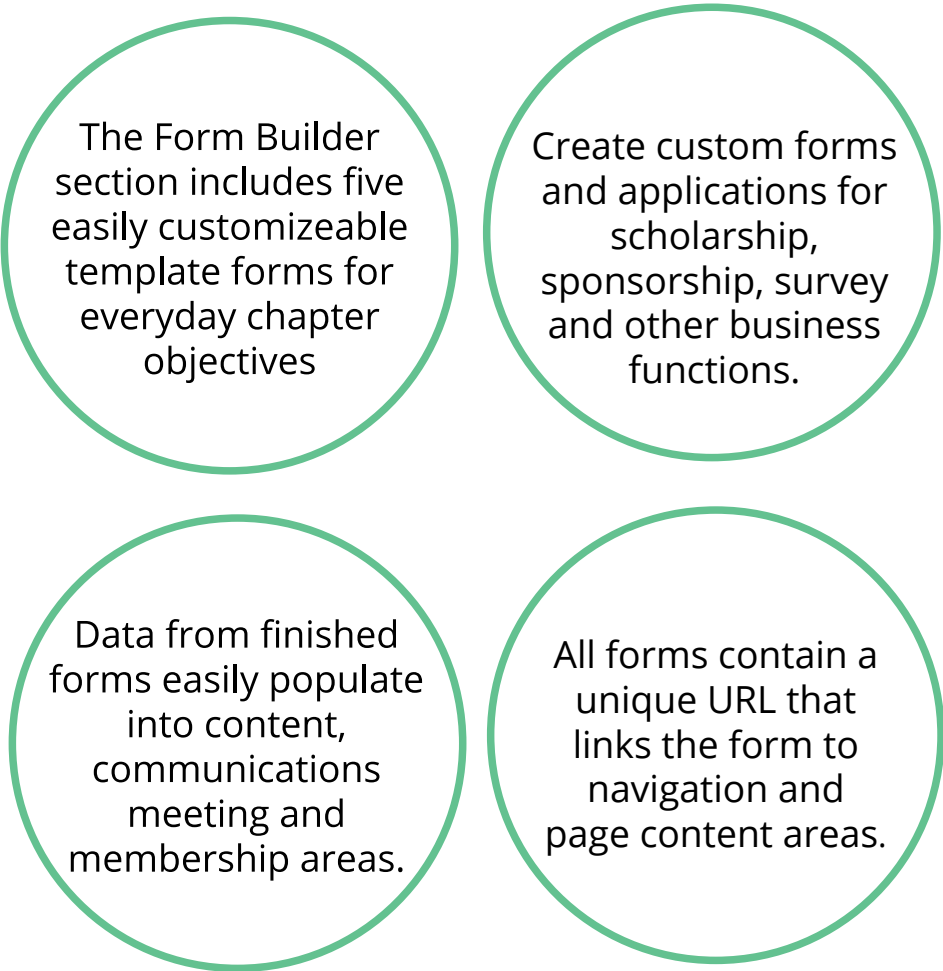| General Information |
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| Build Form - Question Types |
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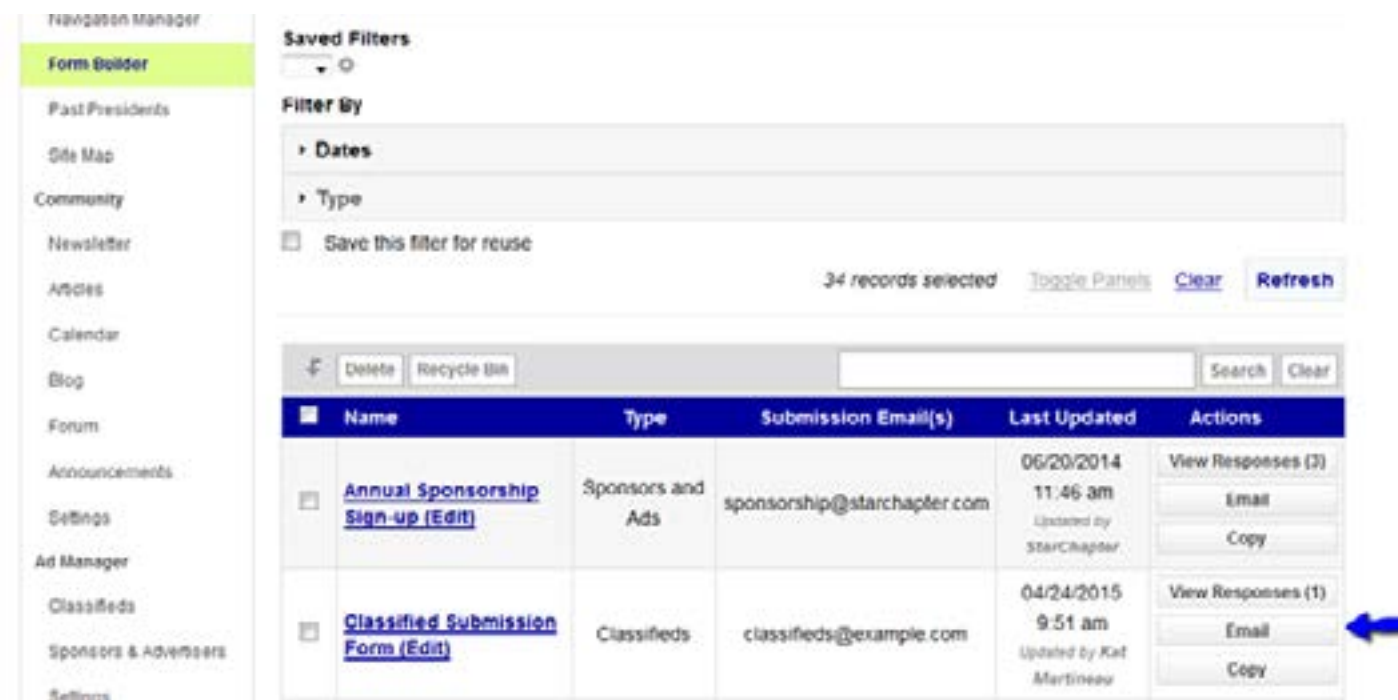
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From Admin Area to Front-End

Navigation Manager
Page Content
Email Manager

After completing a form, it is easy to start sending an email to members and non-members. First, locate the Email button under actions:

After completing a form, it is easy to start sending an email to members and non-members. First, locate the Email button under actions:

Mailing Type: The Form Email will automatically populate.
Template: The template will automatically pull from the form template. Any changes to this template can be made in Communications > Settings > Templates.
Form: The form from the previous step will automatically populate in this section.

Alternately, another file path to get to the same page is Communications > Email Manager. For more information about sending the email, go to the knowledgebase article about **Sending an Email**.

Inside Form Builder

General Information

Build Form - Question Types

Thank You Messages
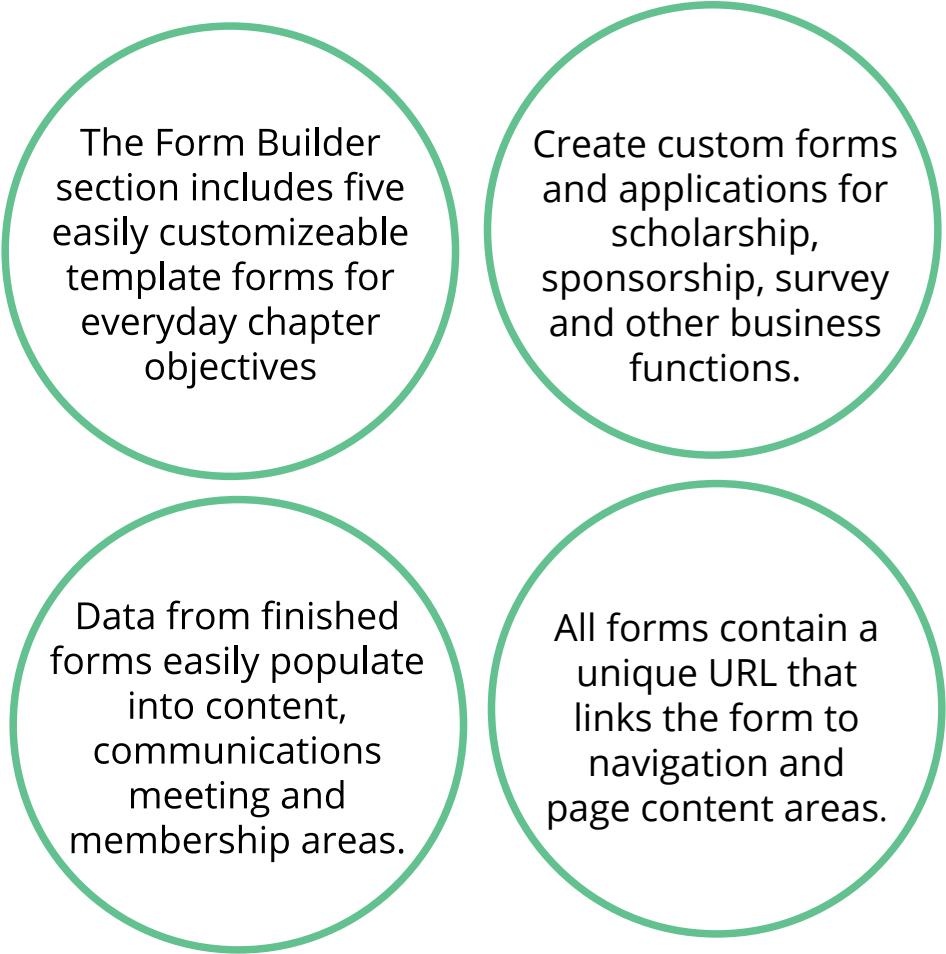
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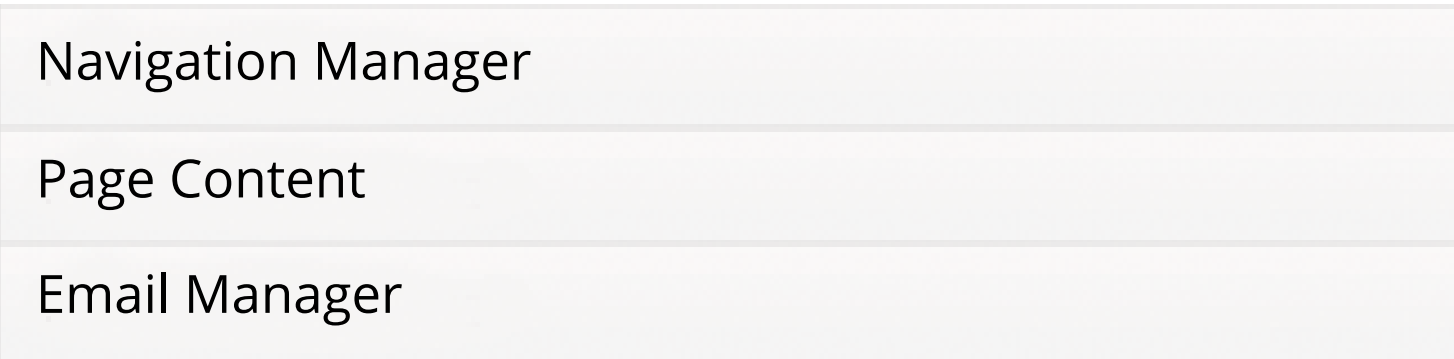
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From Admin Area to Front-End

| Navigation Manager |
| Page Content |
| Email Manager |

Inside Form Builder

| General Information |

General Info | Build Form | Thank You Message | All Done!

General Information
Name:
Email Form Contents To: A single email address
Enter Email Address: info@starchapter.com
Show Questions: To the left of the response
Auto-complete? ⑦   ☑

General Information
Name: This is the name of the form. This name will appear within the navigation manager and page content
Email Form Content To: Upon completion of the form, set whether this will go to ne email address or multiple email addresses.
Enter Email Address: Enter all of the email addresses of the individuals who will receive the contents of the finished form.
Show Questions: This is a stylistic choice. Place questions above the response is best for short forms, while placing questions to the left works well for longer forms.
Auto-complete: Logged in users will be able to have their information autopopulate as they complete the form.

Type

In this area, there are five different form types. It is important to pick the correct type here, as this information cannot be changed once the form is completed. Click on the form name to receive in-detail information about setting up each type of form.

General - This is for forms that collect information, but do not populate into another area of StarChapter.
Member - This form pulls information from the Dues Manager and populates information into the Member Manager.
Non-Member - This has the capacity to fill in information to the Non-Member Manager
Classified - Completed forms in this area will automatically populate into Ad Manager > Classifieds.
Sponsor - Information created in this form populates into Ad Manager > Sponsors and Advertisers.

Double Opt-In Confirmation - This is best used for people who want to be on the email list. This ensures that they give your organization permission to send them email and other electronic communication.
Email Confirmation Template - If the double opt-in confirmation is checked, then leave this selection. This template can be changed in Communications > Settings > Templates.

Security

Include Verification Image? This creates an automated image that front-end users fill out. This provides additional security to keep spambots from filling out forms.

Restrictions?
If this form is restricted to Members, Board Members, or an event attendee list, then you can setup the form restriction here. Please note, the groups need to be setup at Membership > Group Manager.

Fee
1) If there are no fees associated with the form, then users will see an onscreen thank you message and receive a conformation email. The people who are set to 'Email Form Contents To' will receive an email with the form's content.
2) Any form with a fee associated with it will go to a payment screen to pay for the form. The front-end user will receive a receipt or invoice as an email confirmation. Admin users will receive an receipt, and the person set to 'Email Form Contents To' will receive the form content.

Build Form - Question Types

Thank You Messages

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Navigation Manager

Page Content

Email Manager

Inside Form Builder

General Information

Build Form - Question Types

QUESTIONS
Text - Includes an entry box up to 255 characters. This is best for short entries including names, addresses and phone numbers
Paragraph Text - This provides up to 500 characters, and works well for 75-100 word entries.
List of Checkboxes - The user can select one of many options. In data collection, a checked box yields a 'yes' answer, and an unchecked box yields a 'no' answer.
List of Radio Buttons - The user can only select one of a number of options. Only the selected answer will show up in data collection in a 'yes' format.
Drop Down List - The also allows the user to select one of many options, and this is best when there are 7+ choices to select. In data collection, the name of the entry the user chooses is recorded.
File **Upload** - The file may not be larger than 20MB in size, and most formats are accepted.
WYSIWYG Editor - This displays a large text editor with formatting buttons. Use this to add images and text for long form entries.
List of States - Drop down box for US States. To enable Canadian provinces, go to General > Configuraton, search for 'Canada Provinces', and set to 'yes'.

LAYOUT
Comment - This provides instructions or clarification about a form.
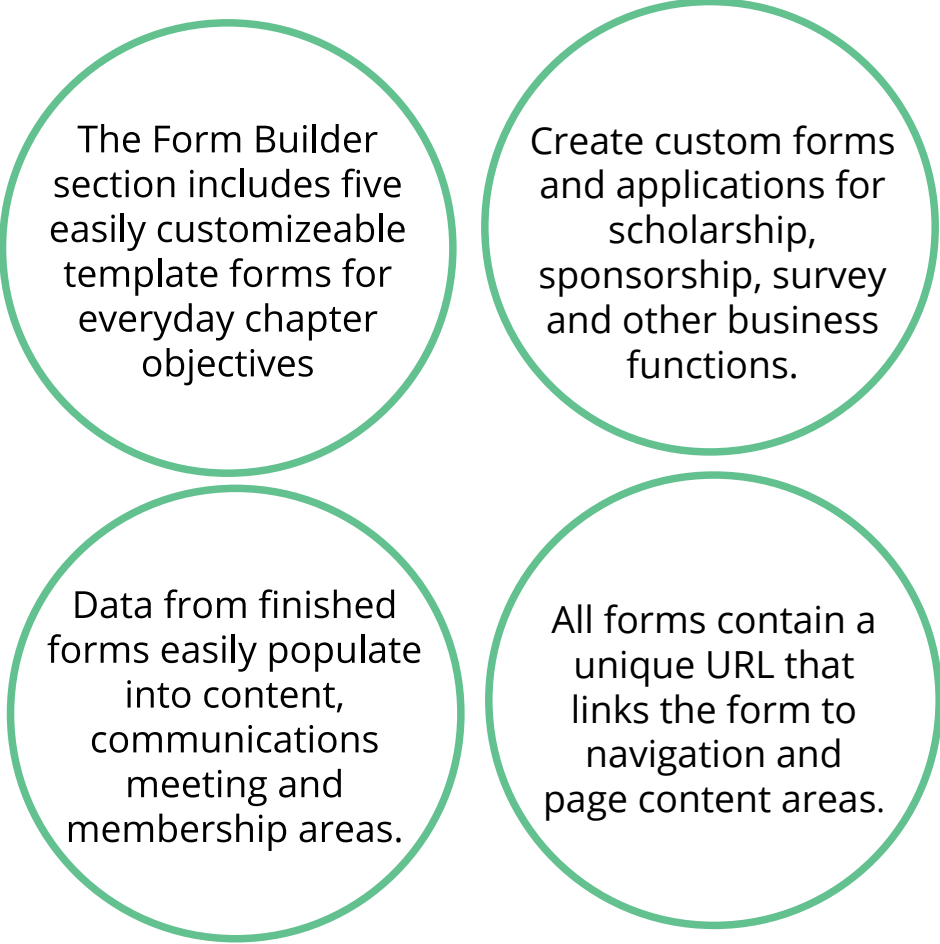**Section Header** - Use this to create additional headings to break up a longer form.

Thank You Messages

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The text and image will appear on the front-end of the website once the form is completed. This can be customixzed with images, text and can pro-mote other areas of the website.