Forms Module

Table of Contents

1. [Forms List 2](#_Toc378258197)
2. [Add/Edit Form 3](#_Toc378258198)

# Forms List

**Functional Description**

This view displays one or more Forms in tabular form.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Form Name | Link | Link to Form Builder |  |
| Submissions | Link | Link to Show Submissions |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Edit | Icon | Associated with a record and displayed in-line |  |
| Duplicate | Icon | Associated with a record and displayed in-line |  |
| Delete | Icon | Associated with a record and displayed in-line | Alert: “You’re about to delete 1 form. Are you sure you want to delete 1 form?”  Buttons: “Delete Form” and “Cancel” |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Add Form | Link |  |
| Edit Form | Link | If one Form is selected |
| Save Form As | Link | If one Form is selected |
| Delete Form | Link | If one or more Forms are selected |
| View Submissions | Link | If one Form is selected  If selected form has submissions |
| Download Submissions | Link | If one Form is selected  If selected form has submissions  Use dropdown link adjacent to View Submissions |

**Exceptions**

None

**Notes and Issues**

None

# Add/Edit Form

**Functional Description**

This view allows the User to create a new form or edit an existing form.

**Fields**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Form Name\* | Textbox & Text | Field displays as a textbox until a value is entered and saved  Default value to “Untitled Form ([date])”  Example: Untitled Form (1/1/2014)  May be modified inline  Once saved, the value is displayed as text |  |
| Form Submissions | Link | Number of form submissions displayed as a link near Form Name |  |
| Tag(s) | Textbox | Display existing tags within a textbox and allow new tags to be added within textbox  Use live search pattern to return matches as the user types |  |
| Automation | Link | Display names of Automation Workflows that this form affects (triggers a start or stop)  Link to Automation Workflows with link to return to Form | If Form has not been saved, then prompt user to stay on page or leave page. |
| Form Fields | Depends upon selection | For new forms, pre-populate with Name, Email, and Phone  Group fields by Contact Fields and Custom Tab Fields |  |
| Fields | TBD | Multi-select with search option  Selecting a field inserts the field in the form |  |
| **Submission Settings** | | | |
| Thank you Page | Textbox |  |  |
| **Form Code** | | | |
| HTML Code | Text area |  |  |

**Actions or Controls**

|  |  |  |  |
| --- | --- | --- | --- |
| Name | Type | Additional Information | Validation |
| Back to list | Link | Returns user to Forms List |  |
| Edit Form Name | Icon | Replaces Workflow Name with a textbox containing the Workflow Name |  |
| Save Form Name | Icon | Displays if ‘Edit Workflow Name’ selected  Saves the new name and replaces textbox with the new text |  |
| Cancel Editing Form Name | Icon | Displays if ‘Edit Workflow Name’ selected  Cancels editing and replaces textbox with original text |  |
| Delete | Icon | Applies to Form Fields  Deletes selected Form Field from Form |  |
| Drag | Icon | Applies to Form Fields  Allows User to reorder fields |  |
| Required | Icon | Applies to Form Fields  Allows User to require fields |  |
| Visible | Icon | Applies to Form Fields  Allows User to toggle visibility of fields |  |
| Submit | Button | Action submits data to SmartTouch and then redirects according to Settings |  |
| Copy to clipboard | Link | Copies form code snippet to clipboard |  |

**Navigation Options**

|  |  |  |
| --- | --- | --- |
| Name | Type | Additional Information |
| Save Form | Link | Applies to Add and Edit mode |
| Save Form As | Link | Applies to Add mode after the form has been saved  Also applies to Edit mode |
| Test Form | Link | Applies to Add mode after the form has been saved  Also applies to Edit mode  Display hosted version  Allow User to submit data in test mode |
| Delete Form | Link | Applies to Add mode after the form has been saved  Also applies to Edit mode  If form affects automation workflow, then prompt User for confirmation as follows:  Title="Are you sure?" Alert="Deleting this form may affect these workflows:  [workflow name]  Deleting a form cannot be undone. Do you want to delete this form?" Buttons="Delete Form" and "Cancel"  If form does not affect automation workflow(s), then confirm prompt User for confirmation as follows:  Title="Are you sure?" Alert="Deleting a form cannot be undone. Do you want to delete this form?" Buttons="Delete Form" and "Cancel" |
| View Submissions | Link | Also applies to Edit mode if the form has submissions  Link to Contact List and display Contacts that submitted this form |

**Exceptions**

None

**Notes and Issues**

1. When forms are submitted, we need to capture the following metadata:
   1. Opt-in Date & Time
   2. Opt-in IP Address
2. Although this is related to click-tracking, we also need to capture metadata when the Contact confirms their opt-in, such as:
   1. Confirmed Opt-in Date & Time
   2. Confirmed Opt-in IP Address
3. Form Status affects whether the hosted form is accessible—not whether form submissions are accepted.