Module: Custom Forms

Function:

Custom Forms can be used as a tool for members and guest to request more information as well as allow the club to collect information about their members. Custom forms can be posted as a stand alone form or can be embedded into the content area of a custom webpage. Notifications can be set to alert administrators/staff when a form has been submitted.

Key Points to Remember:

- There is no limit to the number of forms you can use on your site
- Multiple forms can be posted on a single page using widgets
- Custom forms can be used on either the public or the member/employee side of a website
- Required fields can be set on custom forms
- There is no limit to the number of fields you can use on a custom form
- The same custom form can be displayed on multiple pages

Contents:

Create a Custom Form: (Step 1)

1. Log in as an administrator
2. From the top navigation, click **Web>Manage>Custom Forms>Custom Forms**
3. Click the **NEW** icon (paper with folded corner)
4. **Name the form**-this serves as an identifier for administrators

5. **Instructions**-here you can provide detailed instructions to the user or use this section to describe how the information collected on this form will be utilized by the club. There is a character limit.
6. **On the Fields Tab**-you have the option to add, delete, edit or remove a field. Click the **NEW** icon to add a new field
7. Click the **looking glass** to view previously used fields from the library. Click a **field name** to select OR **click the NEW icon** to add a new field
8. Once you select/name your field, you can choose if it will be a **REQUIRED field** by place a checkmark in the "is Required" box.
9. Select the checkbox for **'multi line field'** if more space is needed to accommodate the users response
10. **Save and close**
11. Repeat the above process for each field you wish to add
12. **To reorder the fields**, use the arrow keys
13. **To delete a field**, use the delete icon (trash can)
14. Next, move to the **Administrators tab**. Select the administrator(s) that should be notified via an email with the information that has been submitted by the user. Use the arrow key to assign an administrator from the list of club staff/administrators.
15. Click the **Web Privileges tab** to indicate who can view and complete the custom form.
16. **Save and Close**

Display a Custom Form (Step 2)

You can have a stand alone form or select a custom webpage to add a form using the widget tool. You may also use multiple forms on a single custom webpage.

Add a Widget onto a custom webpage: (Embedded in content)

1. Log in as an **administrator**
2. From the top navigation, click **Web>Manage>Custom Pages**
3. From the list of Custom pages, double click the page name to **select the page** in which you want to add the form
4. In the tab section, navigate to the **widgets tab**
5. Click the **Add icon** (green + sign) to add a new widget
6. Click the **looking glass** to select the option for custom form
7. Enter a **Display name**-customize the title of the form
8. Click the looking glass to **select the custom form** created in Step 1
9. **Save and close**
10. Now you have added a widget to display the custom form. Change the order of the widgets by using the arrow keys. To edit an existing widget, click the wrench icon.

*You can add multiple forms onto a single custom webpage. Add a new widget for each custom form.

Create a stand alone form from the navigation

1. Log in as an **administrator**
2. Complete Step 1 **(Create the form)**
3. Create a **NEW Custom webpage**, **Web>Manage>Custom Pages>New**
4. **Enter a Name** (for admin purposes)
5. **Display Name-**can leave blank to conserve space on the page
6. **Body Tab-**leave blank
7. **Web Visibility-**allow access to users
8. **Widget Tab-**Add New widget for custom form and link to form created in Step 1
9. **Save and close**
10. Add a **New Navigation** item, **Web>Manage>Navigation Menu**
11. **Select Navigation menu** to add item
12. Add **New** Item
13. Name the New Navigation Item
14. Link Navigation to a **custom page**, use drop down to find custom page created in step 3.
15. Save and close