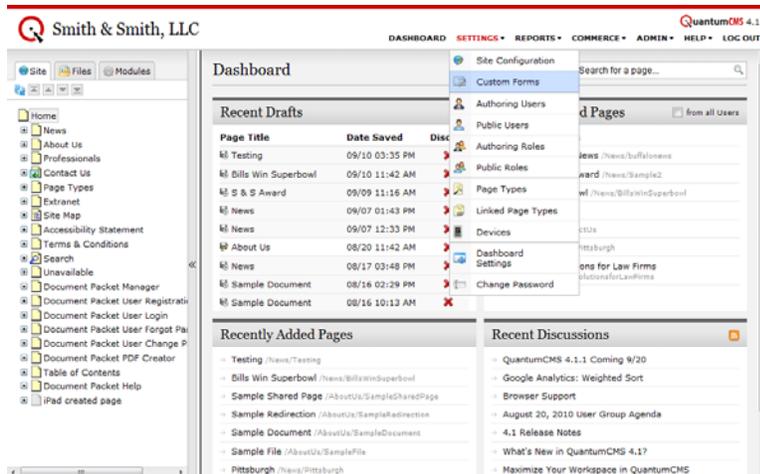


Custom Forms

QuantumCMS includes a tool called the Custom Form Builder that allows you to create response forms, surveys, and the like. When a form submits, an email is generated with the inputted data and sent to the recipient specified in QuantumCMS.

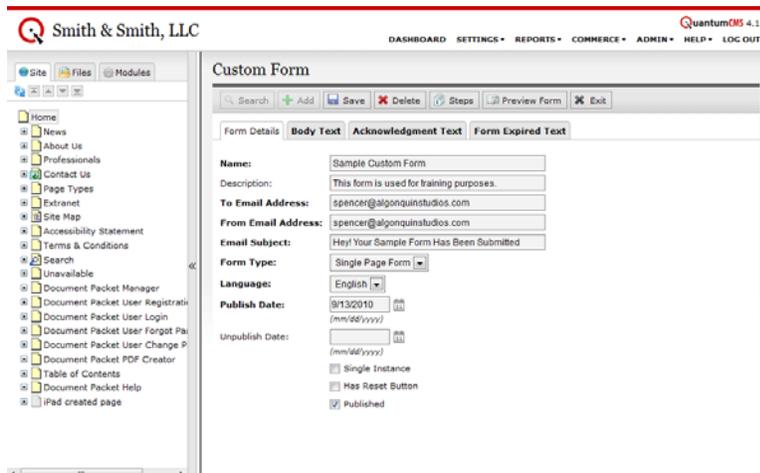
Adding a Form

Step 1: Click on the Settings option in the top navigation and select “Custom Form” from the menu.



Step 2: Click the **Add** button and fill out the required fields to set up the basic properties of the form. Below is an overview of the *Form Details*.

Form Details



Name

This is the internal name for the form that will only appear in QuantumCMS.

Description

This is a summary of the form's purpose.

To Email Address

This is the email address that will receive all form submissions. You can insert multiple email addresses by separating them with commas (e.g. spencer@algonquinstudios.com, support@algonquinstudios.com).

From Email Address

This is the email address that will act as the From Address for all form submissions (i.e. it will appear that form emails are sent from this address). It is recommended that you use the same email address in this field as what you used in the *To Email Address* field.

Email Subject

This is the Subject for all form submission emails.

Form Type

This may be set to a “Single Page Form” or a “Multi-Page Form.”

Language

This is the default language of the form.

Publish Date

This is the date when the form will be available for access by public users. When adding a new form, the current date will be inserted by default.

Unpublish Date

This is the date when the form will be removed from the front-end web site and will no longer be accessible to public users.

Single Instance

Check this box to restrict this form from being displayed on multiple pages.

Has Reset Button

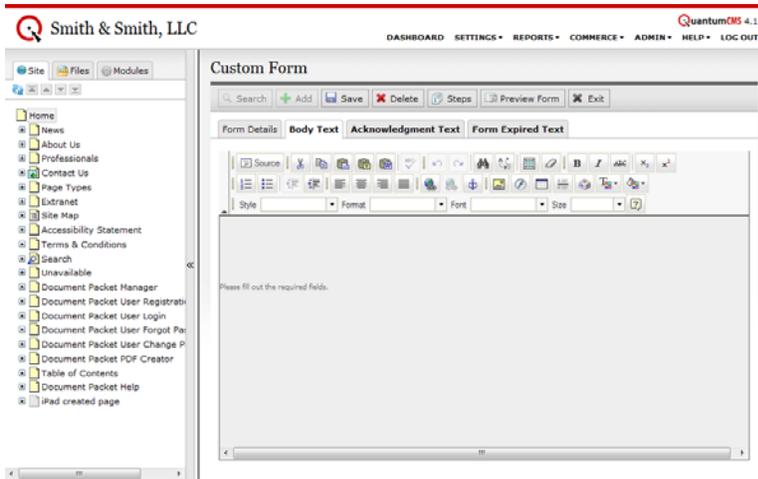
Check this box to add a **Reset** button that allows public users to clear form fields. In most cases, this is not necessary or recommended.

Published

Check this box to allow the form to be displayed on the public web site.

Support Text

You will also be required to fill in content under the *Body Text*, *Acknowledgment Text*, and *Form Expired Text* tabs. You will have use of the standard content editor to format your content.



Body Text

This content will be displayed above the form on the public site when the page loads.

Acknowledgment Text

This content will be displayed on the public site after the form is submitted.

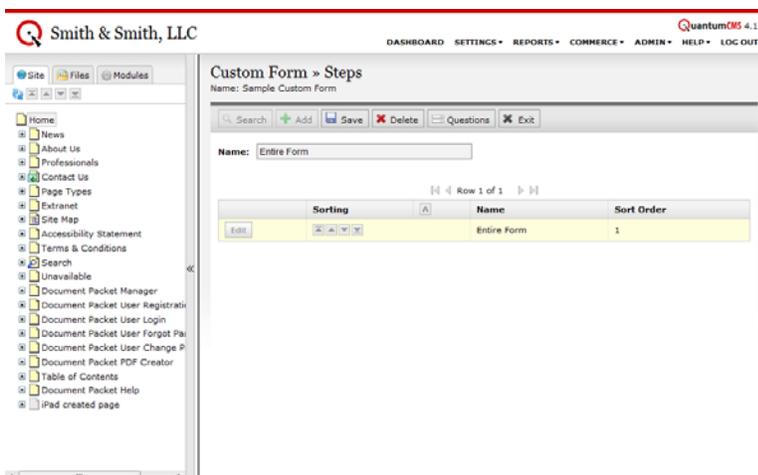
Form Expired Text

This content will be displayed on the public site if a user encounters a form that has reached its *Unpublished Date*.

Adding Questions

Step 1: After **Saving** the Custom Form, you will be able to add Steps and Questions. Begin by clicking the **Steps** button.

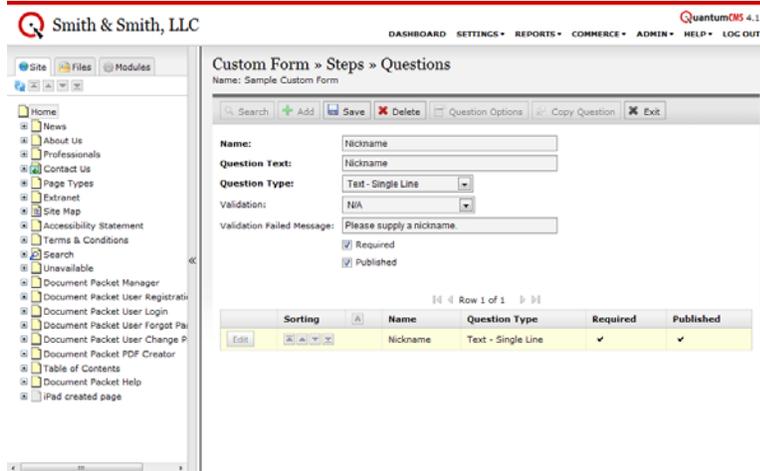
Step 2: You are required to create at least one Step. Click the **Add** button and fill out the *Name* field. Press the **Save** button when you are finished.



Step 3: Click on the **Questions** button.

Step 4: Click the **Add** button to create a new Question and fill out the required fields. Below is an overview of the question options.

Question Properties



QuantumCMS 4.1

Smith & Smith, LLC

DASHBOARD SETTINGS REPORTS COMMERCE ADMIN HELP LOG OUT

Custom Form > Steps > Questions
Name: Sample Custom Form

Search Add Save Delete Question Options Copy Question Exit

Name: Nickname
Question Text: Nickname
Question Type: Text - Single Line
Validation: N/A
Validation Failed Message: Please supply a nickname

Required
 Published

Row 1 of 1

Sorting	Name	Question Type	Required	Published
Edit	Nickname	Text - Single Line	✓	✓

Name

This is the internal name for the question that will only appear in QuantumCMS.

Question Text

This is the text for the question that will appear on the public site.

Question Type

This is the question field type (e.g. checkbox list, text field, and dropdown menu).

Validation

The Custom Form Builder includes some built-in validation options for standard form fields including “Email Address,” “Postal Code,” and “Phone Number.”

Validation Failed Message

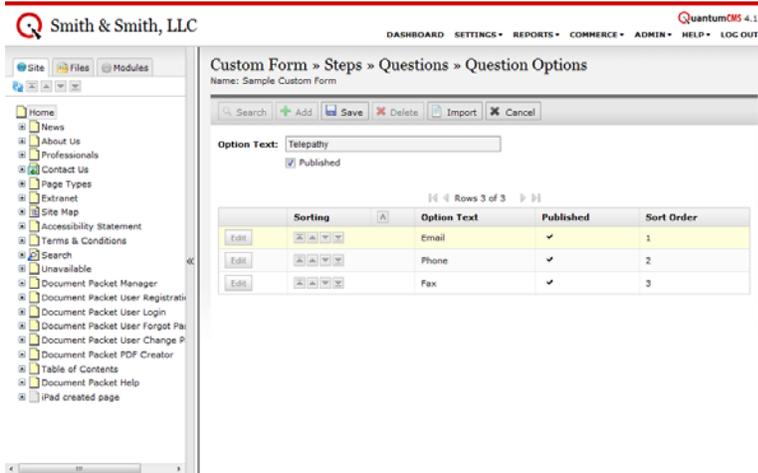
If you select a *Validation* option or make the Question required, then you will need to enter text that describes to the user why the form was unable to submit. For example, if you require users to supply a name and he or she leaves the field blank, you might return a message that says, “Please supply your name.”

Question Options

Several *Question Types* allow users to choose from multiple answers. If you choose a *Question Type* such as checkbox list, radio button list, or dropdown menu, then you must supply Question Options.

Step 1: Click the **Question Options** button.

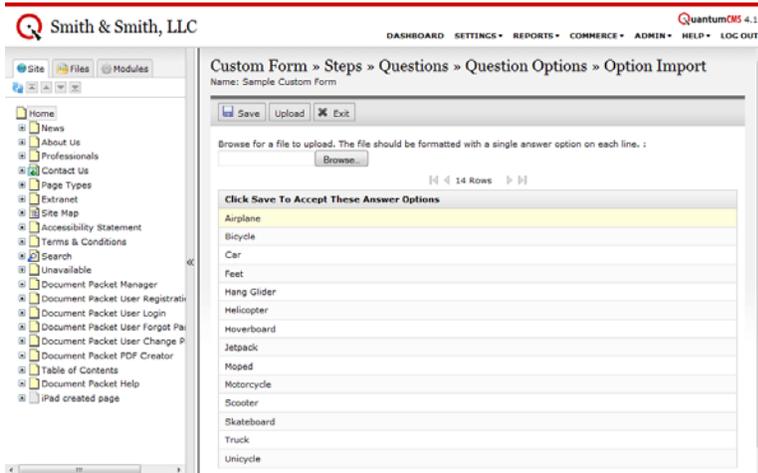
Step 2: Click the **Add** button, fill out the *Option Text*, and **Save** for each Question Option.



Alternatively, you can import a file that lists out the options. The file needs to be saved as plain text (e.g. QuestionOptions.txt) and each option should appear on its own line.

Example:

Car
Truck
Motorcycle
Moped
Etc...



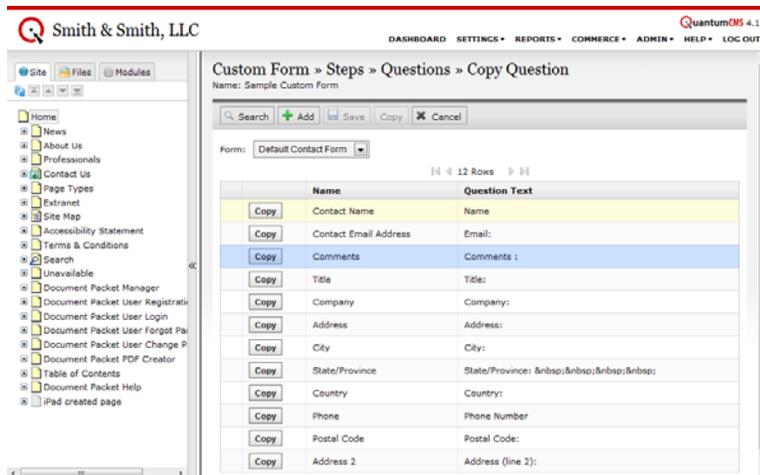
Copying Questions

If you have created a form in the past that includes a question or multiple questions that you would also like to use in your new form, you can copy them.

Step 1: On the Questions Custom screen, click the **Copy Questions** button.

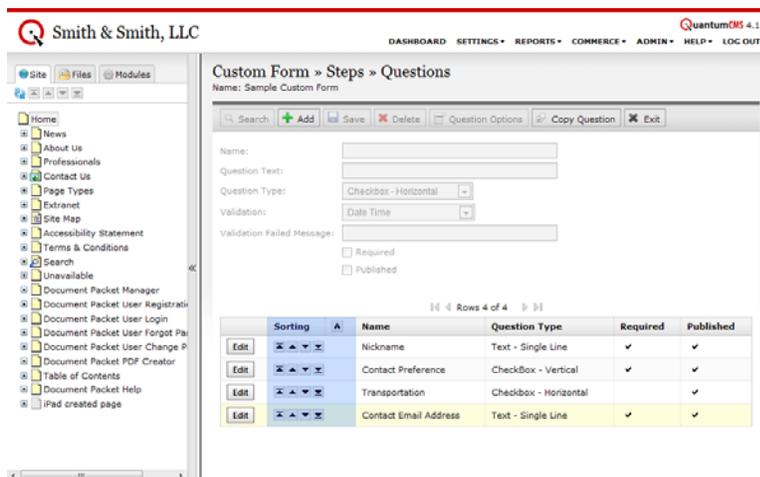
Step 2: Select the *Form* that contains the question(s) that you would like to copy and click the **Search** button.

Step 3: Click the **Copy** button next to the appropriate result(s).



Sorting Questions

You can also change the order in which the questions will appear by clicking the Sort buttons on the Questions screen.



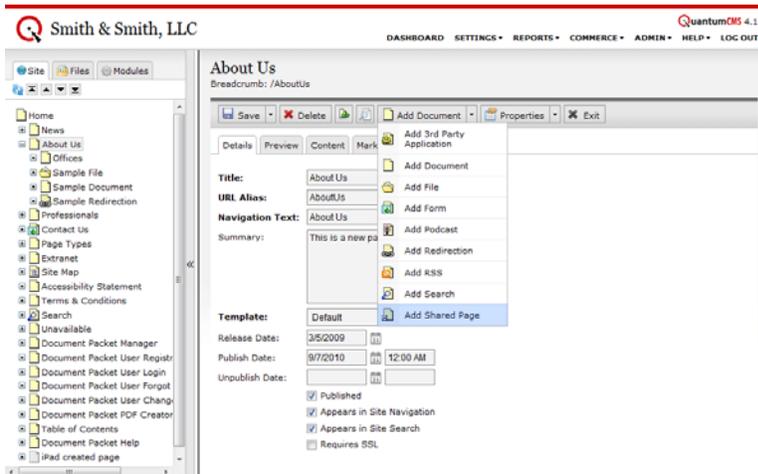
- List alphabetically
- Move to top
- Move up
- Move down
- Move to bottom

Creating a Form Page

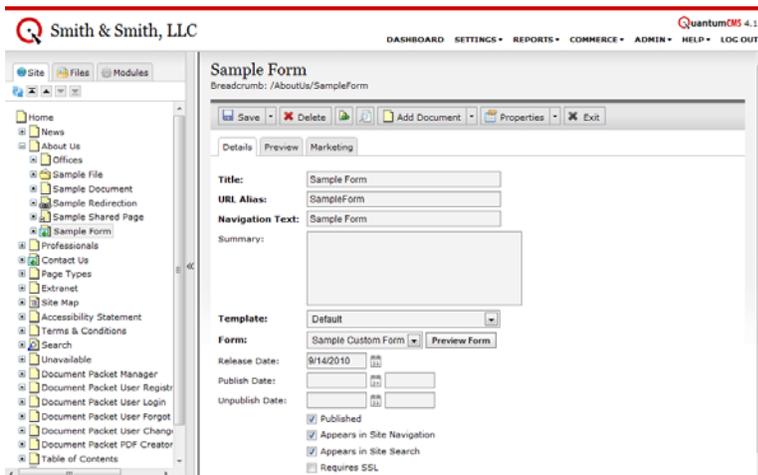
Once you have completed building your form, you will need to create a page where it will display.

Step 1: Using the Navigation Tree, access the section of the site where you wish to add the new page.

Step 2: Click the arrow next to the **Add Document** button and select “Add Form” from the menu.



Step 3: Fill out the details and select the shared page.



Details Overview:

- *Title*: Used in searches and appears as the link text in search results.
- *URL Alias*: Appears in the browser’s address bar.
- *Navigation Text*: Appears in the in the site’s primary and/or sub navigation.
- *Summary*: Used in searches and appears as the abstract in search results.
- *Form*: The custom form that will appear on the page.

Step 4: **Publish** and **Save**.