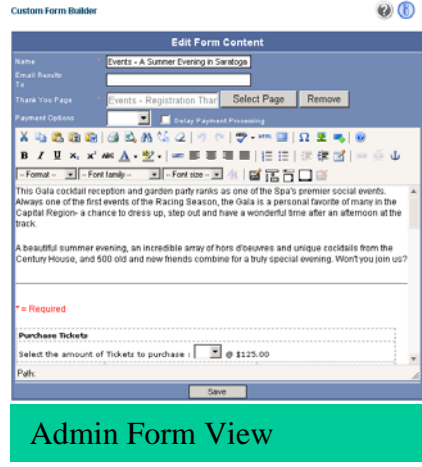


Custom Form Builder - Overview

- Similar to the classic Form Builder Module, Custom Form Builder allows for the creation of forms for data collection from a Website.
 - Contact Forms
 - Online Donations
 - Event Registration
 - Questionnaires
 - Product ordering
 - Service scheduling requests
 - Reservation forms
 - Gift Certificates
 - Online quizzes/tests
- Custom Forms may be configured to securely accept online payments using online or offline payment methods.
 - Payments are processed securely by setting the “SSL” option in the Custom Form Builder Instance.
 - Links to Custom Forms accepting secure online payments must begin with the https:// prefix.
 - Additional coding is added to Credit Card Payment related fields in the Custom Form’s HTML code.
- Custom Form Templates may be created, copied and used to create new forms that maintain consistency within a Site, and allows Clients to manage Custom Forms themselves.
- Advanced Custom Form options include field calculations and auto-fill for Contact/Billing information fields.
- Information submitted by a Site Visitor through a Custom Form may be displayed in a custom template Thank You screen, showing any information submitted by the Visitor through the Custom Form.
 - A Custom Form’s corresponding Thank You/confirmation screen is managed via Page Builder.
- Form results are gathered in the Custom Form Data module.
- Form results may also be sent to an email address in addition to being collected in Custom Form Data module.



Admin Form View

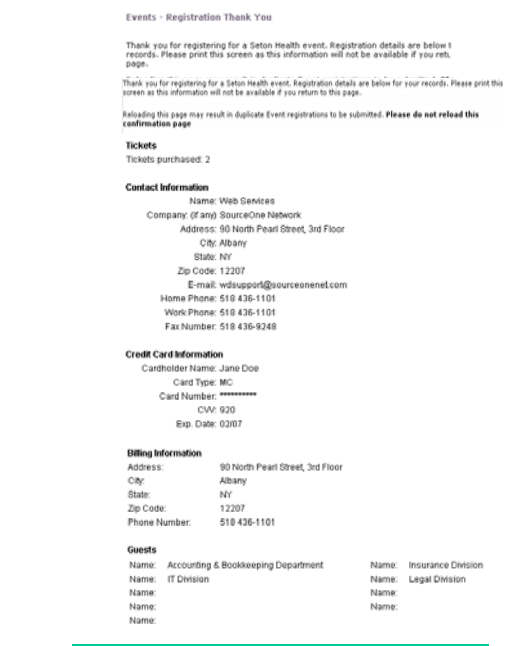


Website Form

Custom Form Data

Response Forms		
Filter Results	Save Filter	Clear Filter
Form Name		Last Response Date Time
Classes - Childbirth Education		07/05/2007 9:46:52 AM
Classes - Childbirth Education starting 7/11/07		07/11/2007 3:20:48 PM
Donale		08/07/2007 11:24:04 AM
Events - A Summer Evening in Saratoga		07/24/2007 4:04:32 PM
Online Donations - Associate Campaign		08/21/2007 11:24:55 AM
Online Donations - General		08/21/2007 2:04:23 PM

Admin Form Data List View



Website Form Confirmation

Custom Form for a Website Visitor

- These are simply examples of possible form fields and how they may be presented on a Custom Form.
- Custom Forms may take on nearly any Web-compatible appearance, and may include images, links and Site design elements.
 - Verbiage, font styles, links, images and other Form content areas may be managed through the Editor Toolbar, the same as in any other WebDirect module.
 - Form Fields are managed through the HTML code and cannot be generated or managed through the Editor toolbar.
- Billing Information form fields will be auto-populated when a User ticks the “Check if same as above” checkbox.
 - The Billing Information is copied from the Contact Information form fields.
- Clicking “Submit” will send the form information to Custom Form Data module.
 - If selected the results will be also be sent to an email address
 - Site Visitor may be directed to a custom Confirmation, or Thank You, screen.

Events

A Summer Evening in Saratoga

This Gala cocktail reception and garden party ranks as one of the Spa's premier social events. Always one of the first events of the Racing Season, the Gala is a personal favorite of many in the Capital Region - a chance to dress up, step out and have a wonderful time after an afternoon at the track.

A beautiful summer evening, an incredible array of hors d'oeuvres and unique cocktails from the Century House, and 500 old and new friends combine for a truly special evening. Won't you join us?

* = Required

Purchase Tickets

Select the amount of Tickets to purchase: @ \$125.00

Contact Information

Name:*

Company: (if any)

Address:*

City:*

State:*

Zip Code:*

E-mail:*




Home Phone:*

Work Phone:

Fax Number:

Credit Card Information

Cardholder Name:* (As it appears on your card)

Card Type:*   

Card Number:*

CWV:* (3-digit number on back of card)

Exp. Month:*

Exp. Year:*

Billing Information

Check if same as above.

Address:*

City:*

State:*

Zip Code:*

Phone Number:*

Guests (if purchasing more than 1 ticket, please list Guest names)

Name: <input type="text"/>	Name: <input type="text"/>
Name: <input type="text"/>	Name: <input type="text"/>
Name: <input type="text"/>	Name: <input type="text"/>
Name: <input type="text"/>	Name: <input type="text"/>
Name: <input type="text"/>	Name: <input type="text"/>

Custom Form Builder – Admin View

Custom Form Builder



Form Contents (Add New Form Content)		
Filter Results	Save Filter	Clear Filter
Name		
Classes - Childbirth Education starting 7/11/07		
Events - A Summer Evening in Saratoga		
Events - TEMPLATE - Accept Payments		
Online Donations - Associate Campaign		
Online Donations - General		

- All Custom Forms are listed on the Form Content screen
- Click the pencil icon to the left of a Custom Form's name to open the form for editing.
- Click the red circle icon to the left of a Custom Form's name to delete the form.
 - Deleting a Custom Form does not delete the form's results from Custom Form Data.
 - Deleted Custom Forms cannot be recovered.
- The Filter link to the top left of the table's light blue header bar allows a User to specify which form results to view.

Custom Form Builder



Form Contents (Add New Form Content)		
Filter Results	Save Filter	Clear Filter
Name	Contains <input type="text"/>	
Max Results per Page	<input type="text" value="30"/>	
Field 1	Name <input type="text"/> Ascending <input type="text"/>	
<input type="button" value="Filter Results"/> <input type="button" value="Clear All"/>		
Name		
Classes - Childbirth Education starting 7/11/07		
Events - A Summer Evening in Saratoga		
Events - TEMPLATE - Accept Payments		
Online Donations - Associate Campaign		
Online Donations - General		

Custom Form Builder – Editing Custom Form Text, Links & Images

Custom Form Builder



Edit Form Content

Name *

Email Results To

Thank You Page *

Payment Options Delay Payment Processing

-- Format -- -- Font family -- -- Font size --

This Gala cocktail reception and garden party ranks as one of the Spa's premier social events. Always one of the first events of the Racing Season, the Gala is a personal favorite of many in the Capital Region- a chance to dress up, step out and have a wonderful time after an afternoon at the track.

A beautiful summer evening, an incredible array of hors d'oeuvres and unique cocktails from the Century House, and 500 old and new friends combine for a truly special evening. Won't you join us?

*** = Required**

Purchase Tickets

Select the amount of Tickets to purchase : @ \$125.00

Path:

- Text, links and images may be managed the same as other content pages through the use of the Editor Toolbar.
- Form fields may added through the rich-editor, but must be formatted through the HTML code.
 - Form fields must have matching ID and NAME tags
 - Page Builder use the content of the field's NAME tag to pull in data and display it on the confirmation page.

Custom Form Builder – Creating a Custom Form

1. Click the "Add New Form Content" link located to the right of the Form Contents text in the blue header bar.
2. The form Name must match the prefix name of the form thank you screen in Page Builder.
 - I.E.: Membership Application
3. To send form results to an email address as well as collecting the data in the Custom Form Data module, enter an email address into the "Email Results To" field.
4. Click the "Select Page" button to the right of the "Thank You Page" field.
 - Select the form's Thank You page, previously created in Page Builder, from the list.
5. Click into the content area and switch to HTML mode.
6. Enter the tag "`<div id="errors"></div>`" (without the quotes) into the HTML edit screen.
 - `<div id="errors"></div>` This DIV tag must be entered into all new forms created via Custom Form Builder.
7. Paste the contents from the Page Builder page into the HTML edit screen
8. Add form button tags to the bottom of the HTML code.
 - `<input name="Submit" type="submit" value="Submit" /> <input type="reset" value="Reset" />`
 - Note: The VALUE tag defines the text to be shown on the button by a form User.
9. Switch out of HTML mode and Save the changes.

The shape of the form and its information has now been created but is not yet functional for collecting data, as no active form fields have been created. At this point, it's to personal preference whether to work directly through the HTML edit mode of Custom Form Builder, or to work in the text editor where the code has already been copied into. If the choice is to use a text editor to work, and then paste the results into Custom Form Builder, it is recommended to ensure the reverse is done if changes are performed directly through Custom Form Builder to the form for consistency in copies.

Custom Form Builder

Name	Add New Form Content
Classes - Childbirth Education starting 7/11/0	
Events - A Summer Evening in Saratoga	+
Events - TEMPLATE - Accept Payments	
Online Donations - Associate Campaign	
Online Donations - General	

Custom Form Builder

Name: Events - A Summer Evening in Saratoga

Email Results To: [Empty]

Thank You Page: Events - Registration Thank You Page [Select Page] [Remove]

Payment Options: [Dropdown] [Delay Payment Processing]

Rich Text Editor:

This Gala cocktail reception and garden party ranks as one of the Spa's premier social events. Always one of the first events of the Racing Season, the Gala is a personal favorite of many in the Capital Region- a chance to dress up, step out and have a wonderful time after an afternoon at the track.

A beautiful summer evening, an incredible array of hors d'oeuvres and unique cocktails from the Century House, and 500 old and new friends combine for a truly special evening. Won't you join us?

* = Required

Purchase Tickets

Select the amount of Tickets to purchase : [Dropdown] @ \$125.00

Path: [Text Field]

[Save]

Custom Form Builder – Creating Form Fields

A form field is an area for data collection from the User, which may be required or optional. The User sees a text prompt indicating the data being solicited for a field. From a form builders side, the text prompt is also the field label that identifies the form field so it makes sense when matched to the submitted data and viewed through the Admin. A label or Field ID tag matches the name of its correlating form field. All Form fields must have an accompanying Field ID tag, whether in a <td> or in a <label>.

- `id="forField:FirstName"`
 - The Field ID tag may be used in a LABEL or in a TD tag, indicating the heading text for each area collecting information on a form. The Field ID tag value matches its corresponding form field NAME.
 - I.E.: `<td id="forField:FirstName">First name: <input name="FirstName" size="35" type="text" /></td>`

OR

- `<label id="forField:July_12_Lockport">July 12- Lockport</label>: <input name="July_12_Lockport" type="radio" value="65USD" /> $65.00 Fee`
 - When used as a LABEL, the visible text bracketed by the LABEL tag is shown in Custom Form Data preceding the information submitted via the correlating form field.
 - When used in a TD, all visible text in the table cell will be displayed in the Admin to the left of the submitted information.

Form Actions

- A form field may be made mandatory to compel a form User to provide desired information. Failure to complete a mandatory field will result in an error message being presented to the User on form submission.
 - Note the REQUIRED tag is not an ID but a CLASS tag.
 - `<input class="required" maxlength="255" name="Name" size="40" type="text" />`
- To make the form fully active, a button to submit the form data must be included at the bottom of the form.
 - `<input name="Submit" type="submit" value="Register Today" />`
- A button to clear or reset the form fields may also be included at the bottom of the form near the Submit button.
 - `<input type="reset" value="Reset Form" />`

Custom Form Builder – Common Form Fields Defined

- **Radio Button**
 - `<input type="radio" name="NameStaysTheSame" value="Details for selected choice">`
 - A radio button allows for a single selection among multiple choices. The NAME tag in the input tag must be consistent for each available selection in an answer group. The VALUE tag contains the details for the selected option and may be different for each NAME group. Remember: The NAME stays the same.
- **Checkbox**
 - `<input type="checkbox" name="NameStaysTheSame" value="Details for selected choices">`
 - A checkbox allows for multiple selections in an answer group. The NAME tag in the input tag must be consistent for each available selection in an answer group. The VALUE tag contains the details for the selected options and may be different for each NAME answer option. Remember: The NAME stays the same.
- **One-line Text Field**
 - `<input name="Name" size="40" type="text" />`
 - A single-line text field may be sized to fit the width of an area through the SIZE tag. The SIZE is measured by columns (characters including text, punctuation and spaces), and may be adjusted to fit the available width of a form's layout.
- **Multiple-line Text Field**
 - `<textarea cols="40" rows="6" name="Question"></textarea>`
 - A form fields requiring a closing tag, the width of a textarea is defined by COLS (columns), and the height is defined by ROWS.
- **Drop-down Menu**
 - `<select name="State">
<option value="0"></option>
<option value="NY">NY</option>
</select>`
 - Another form field requiring a closing tag, the select field type allows for one selection from a drop-down menu.

Form Actions

A form field may be made mandatory to compel a form User to provide desired information. Failure to complete a mandatory field will result in an error message being presented to the User on form submission. Note the REQUIRED tag is not an ID tag but a CLASS tag.

- `<input class="required" maxlength="255" name="Name" size="40" type="text" />`
- To make the form fully active, a button to submit the form data must be included at the bottom of the form.
 - `<input name="Submit" type="submit" value="Register Today" />`
- A button to clear or reset the form fields may also be included at the bottom of the form near the Submit button.
 - `<input type="reset" value="Reset Form" />`

Custom Form Builder – Formatting Credit Card Payment Fields

- Instance Manager: Click to "Use SSL For Payment Forms: Yes".
- Edit Form Content Actions:
 - Select a "Payment Options" type from the drop-down menu.
 - If "Delay Payment Processing" is selected, the transaction will need the Admin User to finalize the CC transaction.

Creating Credit Card Form Fields

- `Cardholder Name:* <input class="required CCFIELD-NameOnCard" id="CCName" name="CCName" size="30" type="text" />`
 - The addition of CCFIELD-NameOnCard to the CLASS tag indicates the information entered into this field will be used as credit card payment information.
- Eleven fields are required to successfully collect all required credit card information to complete a transaction:
 - NameOnCard,
 - Address,
 - City,
 - State,
 - ZipCode,
 - CardType,
 - CardNumber,
 - ExpMonth,
 - ExpYear,
 - CVV,
 - Amount
- Each one of these eleven pieces of information must have their own input field, corresponding field id tag, and use the appropriate CCFIELD- class tag for identification.

Custom Form for a Website Visitor After Submitting the Form

- The Site Visitor may see a custom confirmation, or Thank You, screen upon form submission.
- The confirmation screen is built and managed through the Page Builder module.
- Confirmation screens may mirror the appearance of the Custom Form, or may look altogether different.
- All submitted form information may be displayed on the custom confirmation screen, or specific pieces of submitted information may be shown.
- Reloading the confirmation screen will cause duplicate form submissions, and may result in multiple charges being levied against a credit card.
- Once a Visitor has left the custom confirmation screen, the form information becomes unavailable and may only be viewed by the Site Visitor reloading the screen.
- Custom Form results viewed through the WebDirect Admin Custom Form Data module may be viewed with or without the template applied.
- Links may be provided on a Custom Form for a print-friendly rendering of the form results.

Events - Registration Thank You

Thank you for registering for a Seton Health event. Registration details are below for your records. Please print this screen as this information will not be available if you return to this page.

Reloading this page may result in duplicate Event registrations to be submitted. **Please do not reload this confirmation page**

Tickets

Tickets purchased: 2

Contact Information

Name: Web Services
Company: (if any) SourceOne Network
Address: 90 North Pearl Street, 3rd Floor
City: Albany
State: NY
Zip Code: 12207
E-mail: wdsupport@sourceonenet.com
Home Phone: 518 436-1101
Work Phone: 518 436-1101
Fax Number: 518 436-9248

Credit Card Information

Cardholder Name: Jane Doe
Card Type: MC
Card Number: *****
CW: 920
Exp. Date: 02/07

Billing Information

Address: 90 North Pearl Street, 3rd Floor
City: Albany
State: NY
Zip Code: 12207
Phone Number: 518 436-1101

Guests

Name: Accounting & Bookkeeping Department	Name: Insurance Division
Name: IT Division	Name: Legal Division
Name:	Name:
Name:	Name:
Name:	Name:

Page Builder – Confirmation Screen

- Copy the HTML code for the Custom Form, then go to Page Builder
- Add a new content page in Page Builder with a title that matches the name of the form, space-hyphen-space, and then "Thank You".
 - I.E.: Membership Application - Thank You
- In the HTML code, [bracket] the form field NAME tags and remove the Field ID tags
 - `<td id="forField:FirstName">First name: <input name="FirstName" size="35" type="text" /></td>`
Entered into Custom Form Builder becomes:
 - `<td>First name: [FirstName]</td>`
... in Page Builder for the confirmation page.
- Once a NAME tag has been assigned to a form field, the data collected by the form field may be inserted into any content area of the Page Builder Confirmation Screen (aka: The Thank You page). By [bracketing] a form field name on the Thank You screen in Page Builder, the information is pulled from the submitted form and replaces the [bracketed] text.
 - I.E.: "Our Client, [FirstName], has contacted us today. [FirstName] would like to speak to..."
- The FIELD ID tag is removed from the LABEL or TD. The INPUT tag is removed, leaving the contents of the NAME tag [bracketed].
 - `<label id="forField:July_12_Lockport">July 12- Lockport</label>: <input name="July_12_Lockport" type="radio" value="65USD" /> $65.00 Fee`
Entered into Custom Form Builder becomes:
 - July 12- Lockport: [July_12_Lockport]
... in Page Builder for the confirmation page.

Thank you for registering for a Seton Health event. Registration details are below for your records. Please print this screen as this information will not be available if you return to this page.

Reloading this page may result in duplicate Event registrations to be submitted. **Please do not reload this confirmation page**

Tickets			
Tickets purchased: [Tickets]			
Contact Information			
Name: [Name]		Company: (if any) [Company]	
Address: [Address]			
City: [City]		State: [State]	
Zip Code: [ZipCode]			
E-mail: [Email]			
Home Phone: [Phone]		Work Phone: [WorkPhone]	
Fax Number: [Fax]			
Billing Information			
Address: [Address2]		City: [City2]	
State: [State2]		Zip Code: [ZipCode2]	
Phone Number: [Phone2]			
Guests			
Name: [Guest1]	Name: [Guest2]		
Name: [Guest3]	Name: [Guest4]		
Name: [Guest5]	Name: [Guest6]		
Name: [Guest7]	Name: [Guest8]		
Name: [Guest9]			

Custom Form Data

Custom Form Data



Response Forms		
Filter Results	Save Filter	Clear Filter
Form Name	Last Response Date Time	
Classes - Childbirth Education	07/05/2007 9:45:52 AM	
Classes - Childbirth Education starting 7/11/07	07/17/2007 3:20:48 PM	
Donate	08/07/2007 11:24:04 AM	
Events - A Summer Evening in Saratoga	07/24/2007 4:04:32 PM	
Online Donations - Associate Campaign	08/21/2007 11:24:55 AM	
Online Donations - General	08/21/2007 2:04:23 PM	

- Information submitted by a Website Visitor using a Custom Form is collected in the Custom Form Data module.
- Click the Title of a Custom Form to see the collected results for the form.
- The Filter link to the top left of the table's light blue header bar allows a User to specify which form results to view.

Custom Form Data



Response Forms		
Filter Results	Save Filter	Clear Filter
Last Response Date Time	between <input type="text"/> and <input type="text"/>	
Form Name	Contains <input type="text"/>	
Max Results per Page	<input type="text" value="30"/>	
Field 1	<input type="text" value="Form Name"/> <input type="text" value="Ascending"/>	
Field 2	<input type="text" value="Last Response Date Time"/> <input type="text" value="Ascending"/>	
<input type="button" value="Filter Results"/>		<input type="button" value="Clear All"/>
Form Name	Last Response Date Time	
Classes - Childbirth Education	07/05/2007 9:45:52 AM	
Classes - Childbirth Education starting 7/11/07	07/17/2007 3:20:48 PM	
Donate	08/07/2007 11:24:04 AM	
Events - A Summer Evening in Saratoga	07/24/2007 4:04:32 PM	
Online Donations - Associate Campaign	08/21/2007 11:24:55 AM	
Online Donations - General	08/21/2007 2:04:23 PM	

Viewing Custom Form Results

Custom Form Data



Responses for "Events - A Summer Evening in Saratoga" Export all responses		
Filter Results	Save Filter	Clear Filter
	Response Date Time	
	view view in template	06/21/2007 2:05:52 PM
	view view in template	07/05/2007 11:01:44 AM
	view view in template	07/24/2007 4:00:04 PM
	view view in template	07/24/2007 4:04:32 PM

- Form results may be exported into CVS by clicking the “Export all responses” link located in the top right of the table’s dark blue header.
- The Filter link to the top left of the table’s light blue header bar allows a User to specify which form results to view.
- The red circle icon to the left of a Response will delete the Response.
- The “View” link displays the data on-screen in a tabular format
- “View in template” open the form results in a new Window. Results are shown in the Custom Form Confirmation Screen (Page Builder), which is the same format that a Form Visitor saw after submitting the form.

View

View in Template

Custom Form Data



View Response	
Response Date Time:	07/24/2007 4:04:32 PM
Select the amount of Tickets to purchase:	2
Name:	Web Services
Company:	SourceOne Network
Address:	90 North Pearl Street, 3rd Floor
City:	Albany
State:	NY
Zip Code:	12207
E-mail:	wdsupport@sourceonenet.com
Home Phone:	518 436-1101
Work Phone:	518 436-1101
Fax Number:	518 436-9248
Cardholder Name:	Jane Doe
Card Type:	MC
Card Number:	5183384820036511
CVV:	920
Exp. Date:	02/07
Address:	90 North Pearl Street, 3rd Floor
City:	Albany
State:	NY
Zip Code:	12207
Phone Number:	518 436-1101

Thank you for registering for a Seton Health event. Registration details are below for your records. Please print this screen as this information will not be available if you return to this page.

Reloading this page may result in duplicate Event registrations to be submitted. **Please do not reload this confirmation page**

Tickets

Tickets purchased: 2

Contact Information

Name: Web Services
 Company: (if any) SourceOne Network
 Address: 90 North Pearl Street, 3rd Floor
 City: Albany
 State: NY
 Zip Code: 12207
 E-mail: wdsupport@sourceonenet.com
 Home Phone: 518 436-1101
 Work Phone: 518 436-1101
 Fax Number: 518 436-9248

Credit Card Information

Cardholder Name: Jane Doe
 Card Type: MC
 Card Number: *****
 CVV: 920
 Exp. Date: 02/07

Billing Information

Address: 90 North Pearl Street, 3rd Floor
 City: Albany
 State: NY
 Zip Code: 12207
 Phone Number: 518 436-1101