



Redback Solutions

# Data Form Management

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# Data Form Management

Data Form Management is used to create data forms which will allow you to collect information from website users if required. The most common use of Data Forms is an enquiry or contact form.

## Accessing Data Form Management

The Data Form Management module is accessed via the Modules tab on the left hand side of the screen (see **figure 1**). This module comes standard with all Visionscape sites however if you are unable to access it via the Modules section, please contact Redback Solutions to have it enabled on your site.

ID	Page Name	Friendly URL Name	Template	Publish
6621	HOME	HOME	Homepage	
6622	ABOUT US	ABOUT-US	Content	
6623	Our Team	Our-Team	Content	
6624	Careers	Careers	Content	
6653	Web Application Developer	Web-Application-Developer	Content	
6627	SERVICES	SERVICES	Content	
6628	Website Development	Website-Development	Content	
6629	Hosting & Domains	Hosting--Domains	Content	
6630	Content Management	Content-Management	Content	
6631	Online Business	Online-Business	Content	
6632	Planning & Development	Planning--Development	Content	
6633	Marketing	Marketing	Content	
6654	E-Commerce	ECommerce	Content	
6655	Shopping Carts	Shopping-Carts	Content	
6656	Online Management Systems	Online-Management-Systems	Content	
6657	Complete Online Business	Complete-Online-Business	Content	

**Figure 1** - Accessing the Data Form Management Module

## Data Form Management – Main Page

Once selected from the left hand side, you will be directed to the main page of the Data Form Management Module (see **figure 2**). On this page you will see a table which lists all the existing Data Forms (or a blank table if you have not yet created a Data Form).

For each Data Form created in your site, you will see the forms' name, the email address where information from completed data forms is sent to, links to edit and delete the form and also a link to view the results of the form (the data collected from submitted Data Forms).

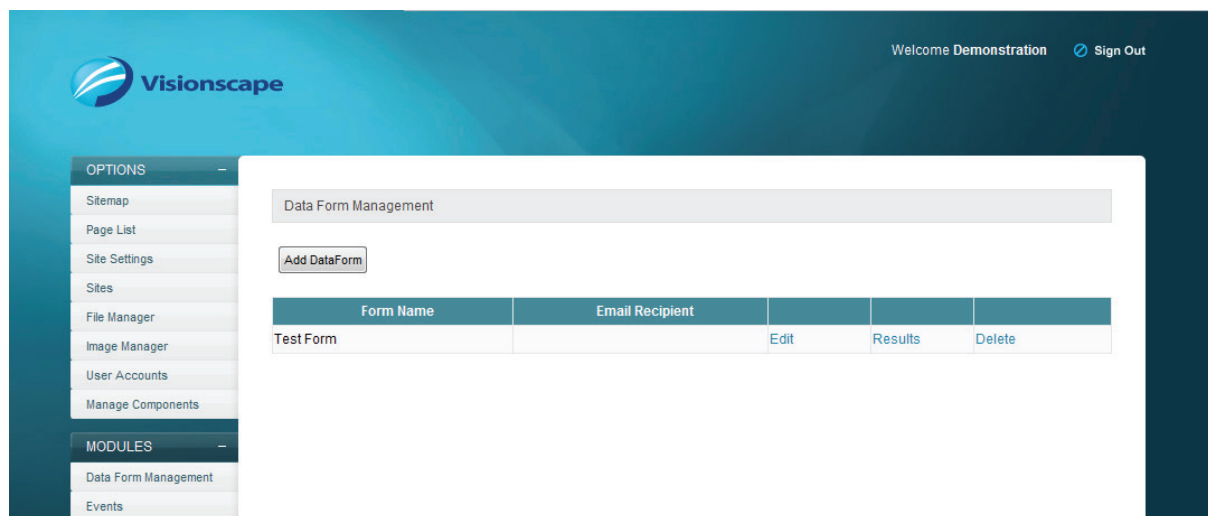


Figure 2 - Data Form Management Main Page

## Adding a Data Form

To create a new Data Form, click the **Add DataForm** button on the main page. You'll be directed to the first stage of the Add Data Form process (see **figure 3**).

### Step 1 – Add/Modify Form

In order to create a form, you must firstly provide a Form Name. You may also provide an email address for the recipient (the email address you wish for the system to send completed forms to). Additionally, you can select whether you wish for the form's Page Title to be shown (more information below), whether you would like to have the added protection of Captcha (a feature used to help prevent spam submissions), and also whether you wish for the user to be emailed once they submit the form.

**Please note:** you can change these options at any time, including the Form Name.

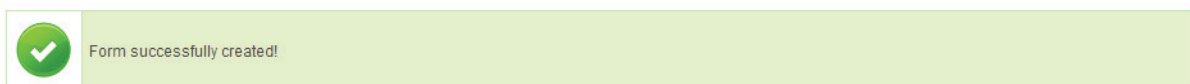
Once you've filled out these details, click **Save Form**.

The page will reload and you'll see a green box with the message '**Form successfully created**' (see **figure 4**). You will also be able to see the next steps for creating a Data Form.

The option for **Thankyou Text** and **Thankyou Email Text** will appear after the form has been created. Thankyou text will appear on the website after a viewer has submitted the form and Thankyou Email Text will be sent in an email if the send email option is selected. To add or edit the Thankyou Text or Thankyou Email Text, click the **Edit Thankyou Text** link or the **Edit Thankyou Email Text** link. The standard text-editing box will appear. Make sure you save your text before closing.

The screenshot shows the Visionscape Data Form Management interface. On the left is a sidebar with 'OPTIONS' (Sitemap, Page List, Site Settings, Sites, File Manager, Image Manager, User Accounts, Manage Components) and 'MODULES' (Data Form Management, Events, Flash Gallery, Member Login, News, Payment Gateway, Product Catalogue, Property Manager, Random Content Block, Script Block). The main content area is titled 'Data Form Management' and contains a 'Form main menu' button. Below this is 'Step 1 - Add/Modify Form' with the following fields: 'Form Name' (text input), 'Email Recipient' (text input), 'Show Page Title' (checked checkbox), 'Include Captcha' (checked checkbox with text 'This will help prevent spam'), 'Send Thankyou Email' (checked checkbox), and 'Conversion Tracking Code' (large text area). A 'Save Form' button is at the bottom left of the form area. Below the form area is a 'Form Elements' section with a text input field. The top right of the page shows 'Welcome Demonstration' and a 'Sign Out' link.

**Figure 3 - Step 1 - Add/Modify Form**



**Figure 4 - Form Successfully Created Message**

## Step 2 – Add/Modify Form Page

By default the form will contain one page. If necessary, you may add additional pages by clicking the **'Add Page'** (see **figure 5**). The page will reload and a text box will appear where you can enter in the Page Name (also known as Title). This will be the Title that will be displayed on your site if you have ticked the 'Show Page Title' option in Step 1.

To modify a form page, click the 'Edit' link corresponding to that page. Again the page will reload to show more options (see **figure 6**).

**Figure 5 - Steps 2 & 3**

It is here that you can enter in text to appear above your form (Header Text) or below your form (Footer Text). Clicking either 'Edit Header Text' or 'Edit Footer Text' will reload the page to display a text editing box, the same used when editing a page within your website.

It is important to note that you **must** click the '**Save Text**' button in order to save any Header or Footer text and you **must** also click the '**Save Page**' button in order to save any changes you've made to the form page. If you do not, any changes you've made to that page (Page Name, Header Text or Footer Text) will be lost.

**Figure 6 - Edit Form Page**

**Figure 7 - Step 3**

- 1 - Label Text
- 2 - Form Page
- 3 - Element Type
- 4 - Required
- 5 - Add Element Button

### Step 3 – Add/Modify Form Element

This is where you can build your form with elements.

**Label Text** is the text that indicates what you are asking for.

*Examples:* First Name, Last Name, Comments/Enquires, How did you hear about... ? Etc.

**Form Page** is the page where this form element is to appear, and is important if you are building a multi-page form, otherwise you can leave it as the default.

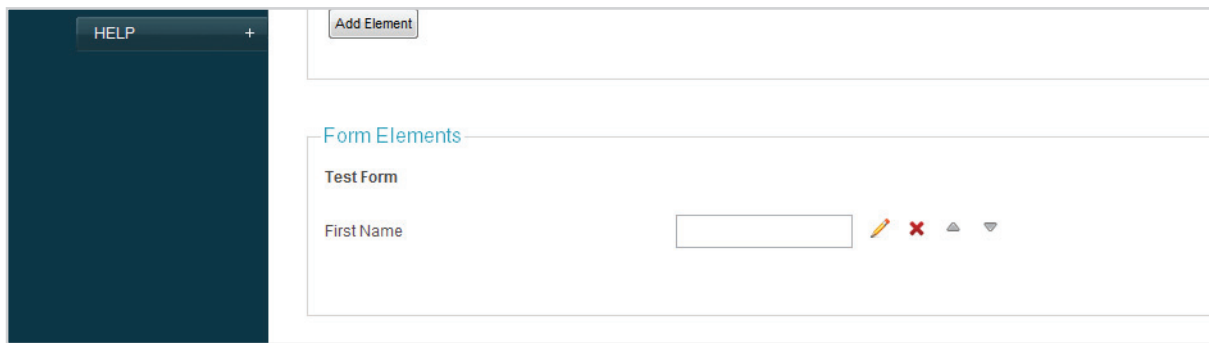
**Element Type** allows you to choose the most suitable element in accordance with the information you are collecting. The most common is the *TextBox*, which is selected by default. Other options include a *Multi-line TextBox*, which is a larger text box, commonly used to gather comments or enquires; a *Label*; a *DropDown List* where you can provide your viewer with a selected amount of options to choose from; a *Checkbox* which is a yes or no answer; an *Email Field* which will check that a valid email address has been supplied; and a *File Uploader* to allow viewers to attached files and documents to the form.

When using an element type other than a *TextBox*, the page may reload to display additional options.

**Required** allows you to indicate if you want to make it mandatory for a viewer to provide information for this particular element. This will be displayed on your form as a \* to indicate required fields. Please note, the \* will only appear on your website, and not when you are creating the form.

When you've filled out the above fields, click the **Add Element** button. The new element will now appear in the **Form Elements** section below.





**Figure 8 - Form Elements**

## Form Elements

### Editing

To edit an existing form element, click the **pencil** icon. This will reload the page and load in the elements information in Step 3 which you can then modify and save.

### Delete

To remove an element, click the **red cross**. You will be asked to confirm that you are sure you want to delete the item.

### Reorder

To change the order in which elements appear on the page, click either the **up** or **down arrow**.

Once you've added all the elements required, make sure you click **Save Form** at the top of the page. You can then return to the **Form main menu** or to another section of your VisionScape site.