Forms

WebHare Forms alllows you to easily create forms - be it standalone, integrated in any website or in your WebHare Publisher website. Anything from simple forms to multi-page questionaires is possible. Some of the advantages:

- Integrate external data sources for use in questions or answers (choosing a product from your webshop or a location from your location database).
- Show or hide questions and pages based on previous answers.
- Support for responsive forms, usable on all types of mobile and desktop devices.
- Results can be stored, e-mailed, added to your CRM, analyzed in Google Analytics...

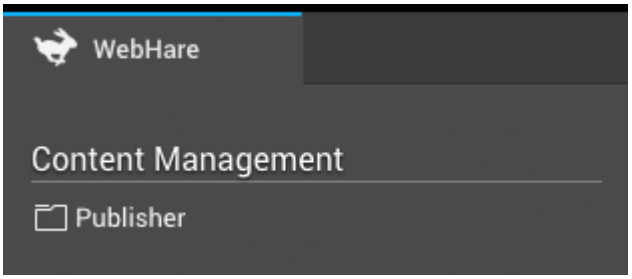
This manual explains creating a form and how to use pages, questions, form handlers and settings.

Start and layout

Starting the Forms editor

Editing a form is done in the Forms editor. The forms editor can be started from the WebHare Publisher websites or the WebHare Forms dashboard.

The Publisher application can be found in the WebHare start menu after logging in:



You can open the "Forms"- application by adding a new form or by opening an existing form.

Adding a new form

1. Start the Publisher application and navigate to the desired folder.
2. Choose "New file" from te menu or buttonbar.
3. From the list of file types choose "Form" and click "OK".
4. The Form file is created and the properties dialog is opened.
5. Change the file name and/or title if desired and click "OK".

The WebHare form is created. The Forms editor can be started by by double clicking the file.

Editing a form

To edit an existing form you can open the file from the Publisher application:

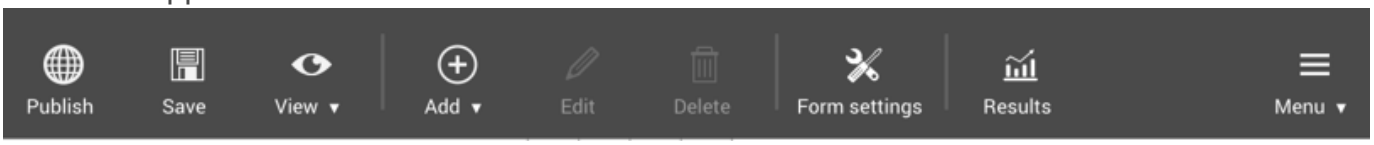
1. Start the Publisher application and navigate to the folder.
2. Double click the form file or select the file and choose "File", "Open" from the menu.

The Forms editor is opened.

The application layout

At the top of the application you can find the buttonbar featuring the most used actions. On the right of the button bar the menu button is displayed. The menu contains all possible actions

within the application.



- "Publish" saves and published the form.
  The form will not be published (visible online) before you have performed this action for the first time.
- "Save" saves the changes that you made without making them available online. You can also save changes to a published form - the unchanged form will remain available online until you replace it by publishing the changes.
- View allows you to view several versions; the published version (as visible to the public), the saved version and the version you are currenty working on, including changes you have made but not yet saved. You can also create a preview link to show to others while protectiging it from public view.
- "Add" allows you to add several items:
  - Pages
  - Groups
  - Questions
  - Text
  - Handlers
- "Edit" allow you to edit the selected page, group, text or handler.
- "Delete" removes the selected page, group, question, text or handler.
- "Form settings" contains specific settings for the form, such as the retention period for collected data, spam checks etc.
- "Results" shows the collected results for the form.

PAGES AND GROUPS

A form consist of at least one page for the form and one "Thank you" page. You can add more pages for more complicated forms.

You can combine questions and texts into groups for presentation or to keep the form you're editing organized.

QUESTION

All fields that can be filled out by the visitor of the form are 'questions'. There is a number of set question types and custom question types may have been added for you. A question can only be placed in a group or on any page, except the overview page.

Read more in the chapter "Questions".

TEXT

Blocks of text can also be added to the form. These can consist of simple text or formatted (bold, italic, etcetera) text. Depending on the website your form is on, adding images or other components may also be possible.

Read more in the chapter "Texts".

HANDLER

Decide what happens when the form is submitted by adding one or more handlers, like sending the results to an e-mailadres and/or sending a summary to the form visitor: read more in the chapter "Handlers".

Questions

General properties

Some things can be set for (almost) all questions:

- The question itself; this field is required, because this is the question that is normally displayed in the form. It is also used while editing the form and displaying or exporting the results.
- Required: a question can be made required. The user will have to fill out the answer field or select and answer to continue or submit the form.

Required and dependencies

When you make a question required based on the visitors response to another question, the simple "Required" setting is no longer valid and will be disabled:



Presentation

Depending on the type of question, one or more of the following options may be available:

- Text before answer; placed before the answer field (can be used for currency symbols).
- Text after answer; placed right after the answer field (can be used for texts like 'Celcius' or 'persons').
- Example answers; this text is placed inside the answer field as a placeholder text. The text automatically disappears when the users selects the answer field or starts typing. It can be used to display an example phone number, IE "0800 0000". The example answer is not saved when the user does not fill out an actual answer.
- Display; by default both the question and the answer field are displayed. This option allows you to only display the answer field when desired.
- (Optional) explanation; contains additional information than can be displayed on hover, or when clicking a 'more info' button. Your form design must be configured to support this feature.

Validation

Depending on the question type several validation options are available. When filled out, the answer field is checked to see if it matches the set validation.

Dependencies

You can make several things depend on the answers given to another question using dependencies; based on what was answered before you can make another question, page, group, text or even form handler behave differently. Depending on the question and the type of item you can make them:

- optional or required
- enabled or disabled
- visible or invisible.

Using dependencies you can let the visitor skip (or not even encounter) unnecessary questions, or require more information based on the visitor's choice. For example: when the preferred method of contact is 'Phone', the actual phone number can be made required, and if 'No partner' is selected an entire 'Partner information' page can be hidden.

Short text field (single line)

A short text field allows the user to fill out a single line answer. This type of question is used for short, open-ended questions like company name or region. The maximum number of characters the visitor can type can be set.

Long text field (multiple lines)

A long text field allows the visitor to fill out a multiple line answer. This type of question is used for longer, open-ended questions like a remark or description. The maximum number of characters the user can type can be set.

E-mail

An e-mailfield can be used to ask the user for an e-mail address. The answer is checked to see if it is a valid e-mail address. You need to add an e-mail question if you want to send the visitor their responses via e-mail.

Number

A number field can be used to ask for a numeric answer. A minimum and maximum value can be set.

Radiobuttons

Radiobuttons allow the user to select a single answer from a limited amount of choices, such as a yes/no question or gender. The question displayed to the left of the radiobuttons can be

added, and you can choose whether the options are displayed next to or underneath each other (horizontally or vertically).

- For the radiobuttons at least one answer option needs to be added.
- You can set one of the answers to be the default selected answer.
- You can set an answer to be 'invalid' - when used in a required question, this answer would not satisfy the requirement. You can use this to create a 'Please choose' option or a 'I do not agree with the terms and condition'.

> ✔ Radiobuttons or pulldown?
>
> Radiobuttons support a limited amount of options - we recommend using a pulldown when there's more than 7 or 8 options.

Pulldown

A pulldown allows the user to select a single answer from a set amount of choices, such as a country choice.

- For the pulldown at least one answer option need to be added.
- You can set one of the answers to be the default selected answer.
- You can set an answer to be 'invalid' - when used in a required question, this answer would not satisfy the requirement. You can use this to create a 'Please choose' option.

Multiple checkboxes

Multiple checkboxes allow the user to check or uncheck one or more answers from the same question, for instance "Prefered contact methods". You can choose not to show the question, but only the answer labels.

- For the checkboxes at least one answer option need to be added.
- You can set which answers are selected by default.
- You can add an optional or required answer field to a checkbox; you can use this for "Other: please fill out".

Single checkbox

A single checkbox allows the user to check or uncheck a single answer option, for example "I agree with the conditions". For a checkbox a *label* can be set, which is displayed to the right of the checkbox. You can not add a 'question' field.

Date

A date question allows the user to pick a date, for instance a date of birth. A minimum and maximum can be set.

Time

A date question allows the user to choose a time. You can choose whether the time should be set in hours and minutes or hours, minutes and seconds by setting the precision to minutes or seconds.

Image

An image question allows the user to upload an image. You can use this to upload a profile photo.

File upload

An image question allows the user to upload an file.

Pages and groups

Pages and groups can be used to organize information and questions into logical portions. You can also use these to hide or display entire parts of the form, based on answers given before by the visitor.

Page

You always need at least one page for questions, and one "Thank you" page at the end of the form. You can add more pages before the "Thank you" page to add more questions and or text.

You can make a page visible or invisible, based on a previously given answer in the 'Dependencies' tab.

The "Thank you"-page can not be deleted and can not contain any questions, only texts (and groups). When you edit the " Thank you" page you can set a redirect page.

> ✔ Redirect after completing
>
> Please note that any texts on the "Thank you" page are not displayed when you set a redirect - you can move them to an additional page placed before.

Group

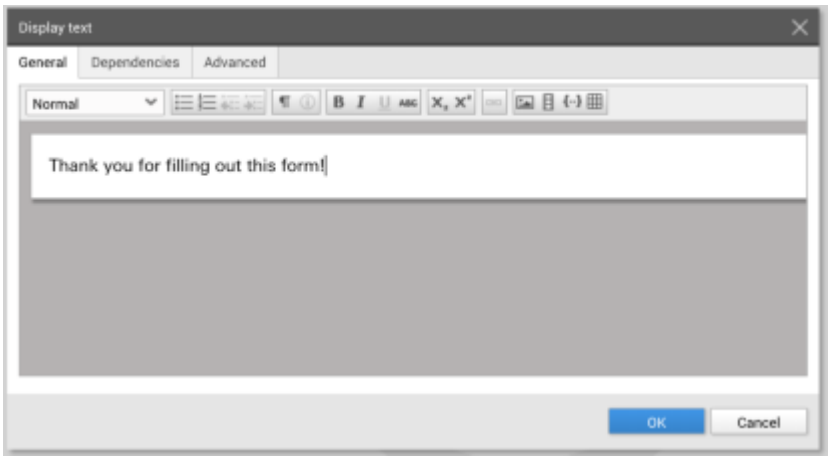
Groups can be used to organize questions and texts:

- You can show the group title in the form
- You can make a group visible based on a previously given answer in the 'Dependencies' tab.
- You can enable or disable all questions in a group based on a previously given answer; when the group is disabled, the questions are visible but the questions can not be filled out.

TEXT

Rich (formatted) text

The option "Add text" allows you to add a formatted text. You can use text formatting like bold and italics, headings, images and links.



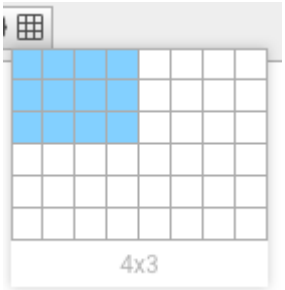
The toolbar at the top of the text field provides access to the different formatting options:

Formatting

> ### Available options
>
> Not all of these options are always available - depending on your website and website design one or more options may not be available.

- Heading 3 Text style; choose one of the predefined styles for your websites. The styles depend on your web site design
- Bullets and numbering
  Change the level of your bullets and numbering - jump to the right or left.
- The properties button is available when an image, link, video or other inserted object is selected - allowing you to change the properties of the selected object.
- B I U ABC Bold, italic, underline, strikethrough.
- X_2 X^2 Superscript and subscript
- Hyperlink
- Image: upload an image from your computer
- {··} Insert an object: which objects are available depends on your website and website design.

- Table: the table button lets you add a table to the form. Tables are not available in all forms and are not recommended for use in *responsive* forms.



Form handlers

After the visitor has submitted the form, the result handling takes place based on the added form handlers. Custom options may be available for your forms. This chapter discusses the most often used default available handlers.

Adding and editing handlers

You can add form handlers by choosing "Add" -> "Handler".

Once you have added a handler they are displayed below "Form Handlers" in the editor, where you can change them by selecting them and choosing "Edit" from the button bar.

E-mail responses to visitor

You can send the response to the visitor of the form:

- First, make sure your form contains a question asking the visitor for their e-mail address.
- Choose "Add" -> "Form Handler".
- Select "E-mail response to visitor" and click "OK".

The E-mail response settings are displayed:

- Choose the question for which the visitor has filled in their e-mail address.
- Choose a name and e-mail address that will be used as the sender of the e-mail. (Please note that not all e-mail address are allowed to be used as a sender, they need to be verified).
- Set up the message you want to send in the e-mail message tab. You can insert the answers the visitor has provided in their message by using 'Merge fields': you can use their name for a formal greeting or show their answers for them to review.
    - Click the "Insert object" from the toolbar .
    - Select "Merge field" and click "OK"
    - Choose the question field for which you want to show the answer in the e-mail and click "OK"
- The field is displayed in the e-mail and will be filled out when sending the response to the visitor.
- Click "OK" to add the respons mail to the handlers.

The handler is added, an en e-mail will be sent to the visitor when they have filled out the form.

Send results by e-mail

You can also send the results of each response to one or more e-mail addresses:

- Choose "Add" -> "Form Handler".
- Select "Send results by e-mail" and click "OK.

The settings are displayed:

- Add the e-mail address(es) you want to send the response to. You can add conditions based on the answer to one of the questions, for instance to send responses to different people based on a chosen "country" question.
- You can add the the message subject.
- Set up the message you want to send in the e-mail message tab. You can insert the answers the visitor has provided in their message by using 'Merge fields':
  - Click the "Insert object" from the toolbar {..}.
  - Select "Merge field" and click "OK"
  - Choose the field you want to show in the e-mail, for instance the visitor name and click "OK"
- The field is displayed in the e-mail and will be filled out when sending the response.
- Click "OK" to add the result mail to the handlers.

The handler is added, an en e-mail will be sent to the visitor when they have filled out the form.

> **!** **Sending personal data**
>
> Please keep in mind that you need to comply with all rules and regulations within your organization and relevant privacy laws when sending personal information.

Results

Saving the results is always needed and does not need to be added as a form handler.

> **Storing personal data**
>
> Please keep in mind that you need to comply with all rules and regulations within your organization and relevant privacy laws when storing personal information.

You can set the retention period (the amount of days the form results are stored) in the form settings. We recommend not storing data any longer than strictly necessary.

> **Retention period**
>
> Please note that after the retention period the result are permanently deleted and can not be recovered!

Viewing results

The form results can be viewed by clicking the "Results" button. A result overview is displayed (you can resize this screen by dragging the screen edges or corners).

- You can open a single result to get a more detailed view.
- You can delete a single result.
- You can delete all results.
- You can export results (see Exporting results below).

Exporting results

Results can be exported. Click "Results" screen button to view the results. Depending on what you want to export:

- Choose "Export" to export all results to an XLSX or CSV file.
- Choose "Export with uploads" to download a ZIP archive containing an XSLX file with the results, and a folder containing the files uploaded by the form visitor.

Downloading and sharing personal data

Please keep in mind that you need to comply with all rules and regulations within your organization and relevant privacy laws when downloading and/or sharing personal information.

Form settings

Pages and groups can be used to organize information and questions into logical portions. You can also use these to hide or display entire parts of the form, based on answers given before by the visitor.

General

Result retention period

Results are stored for 365 days by default. You can choose a different period in these settings.

> **!** Storing personal data
>
> Please keep in mind that you need to comply with all rules and regulations within your organization and relevant privacy laws when storing personal information.

Disable spam check

Spam checks may be available for all your forms. When this is the case you disable the spam check for a form using the form settings.

Availability

To stop a form from being filled out, for instance when enough results have been collected, you can set the form to 'unavailable' in the Form Settings. When the form is unavailable, the (optional) description is displayed instead.