

Automatic Web Forms II

for ACT! 2011 and up



User's manual – part 11

How to create a form series

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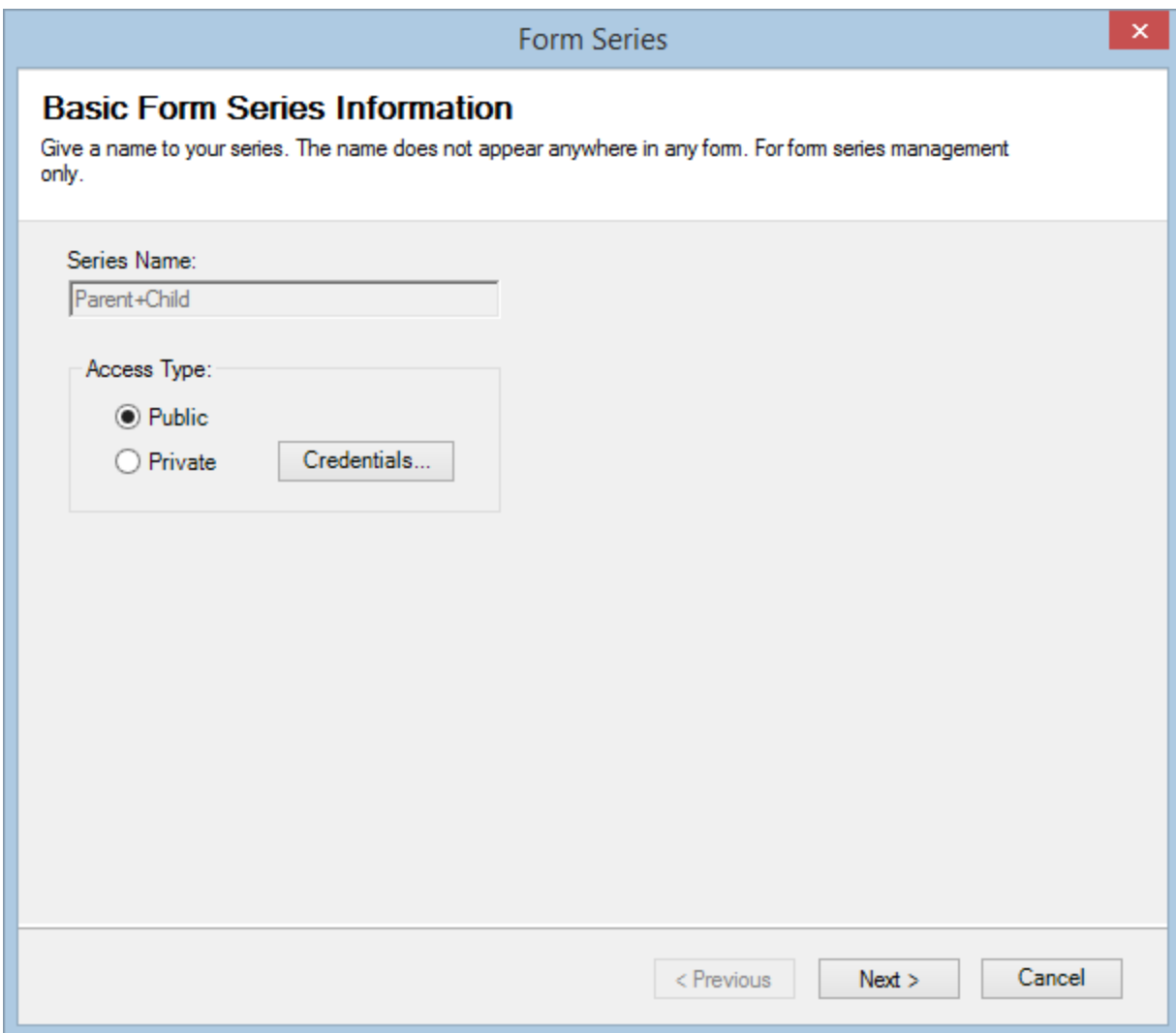
Form series gives you the ability to have your form users fill in several forms in a row. The data from each form will import as separate entities in ACT! but linked together.

For instance, you could a form series to have them fill in their contact information and then their children information. The parent information would import as a contact and each child would import as a contact related to the parent contact.

Creating a form series

To create a form series, you need at least 2 forms.

To create a series, launch the add-on, then go to Series>New Form Series.



The screenshot shows a dialog box titled "Form Series" with a close button (X) in the top right corner. The main content area is titled "Basic Form Series Information" and contains the following text: "Give a name to your series. The name does not appear anywhere in any form. For form series management only." Below this text, there are two sections: "Series Name:" with a text input field containing "Parent+Child", and "Access Type:" with two radio buttons: "Public" (selected) and "Private". To the right of the "Private" radio button is a button labeled "Credentials...". At the bottom of the dialog box, there are three buttons: "< Previous", "Next >", and "Cancel".

Click *Next*. In the second screen of the wizard, you can select up to 3 forms and define the transition between them.

The screenshot shows the 'Form Series' dialog box with the 'Forms and Transitions' tab selected. The dialog has a title bar with a close button (X) in the top right corner. Below the title bar, the text 'Forms and Transitions' is displayed in a bold font, followed by the instruction 'Select up to 3 forms for the series and define the transition between them.' The main area of the dialog is divided into several sections. The 'Series' section contains three rows of form selection and transition options. The first row is for 'Form 1', which is set to 'Parent'. It has two radio button options for the transition to Form 2: 'Automatic' (unselected) and 'Optional' (selected). The 'Transition Link Text' field for this transition contains the text 'Do you wish to register a child?'. The second row is for 'Form 2', which is set to 'Child'. It has two radio button options for the transition to Form 3: 'Automatic' (selected) and 'Optional' (unselected). The 'Transition Link Text' field for this transition is empty. The third row is for 'Form 3 (optional)', which is currently empty. The 'Transition Link Text' field for this transition contains the text 'Relationship Form 1/Form 2...'. Below the 'Series' section is the 'Last Form:' section, which includes a checkbox labeled 'Allow Multiple Entries' (which is unchecked) and a 'Multiple Entry Link Text:' field that is currently empty. At the bottom of the dialog, there are three buttons: '< Previous', 'Save', and 'Cancel'.

NOTE: Because the 2 forms are contact forms, you see a relationship Form1/Form2... button appear so that you may define a relationship (under the Relationship tab). If you click it, you get the list of relationships as defined in Act!.

The screenshot shows the 'Relationship' dialog box. It has a title bar with a close button (X) in the top right corner. The dialog contains two main sections. The first section is 'Form 1 to Form 2 Relation:', with a dropdown menu currently showing 'Parent'. The second section is 'Form 2 to Form 1 Relation:', with a list box showing a list of relationship types: 'Child', 'Child', 'Client', 'Consultant', 'Coworker', 'Employee', 'Family', 'Friend', and 'Manager'. The first 'Child' entry is selected. To the right of the list box, there are two buttons: 'OK' and 'Cancel'. The dialog also has a 'Multiple' label on the left and an 'Id' label on the right.

As you can see the transition between the forms can be automatic or optional. If optional a link will be displayed which text will be the *Transition Link Text* set above.

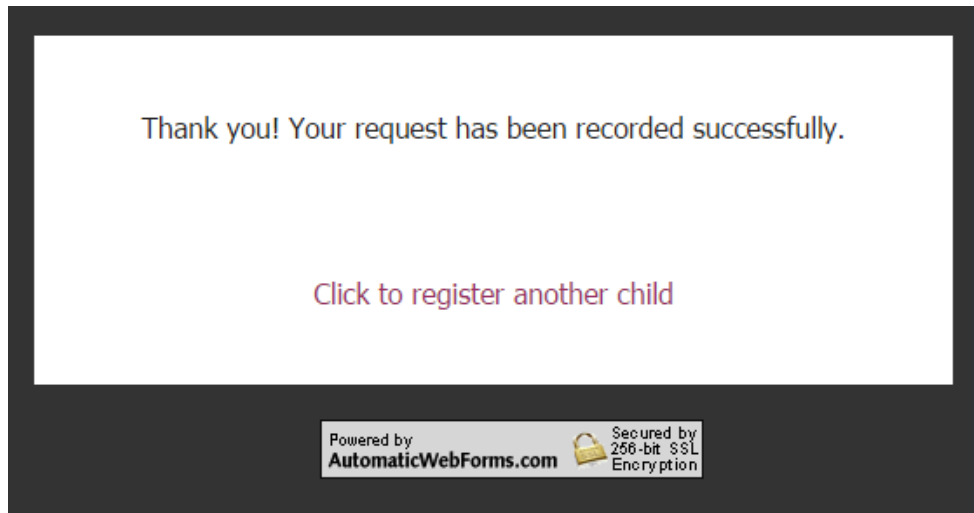


Allowing multiple entries for the last form

If you check the box Allow Multiple Entries, your user will be allowed to submit more than once the last form of the series. Here is an example.

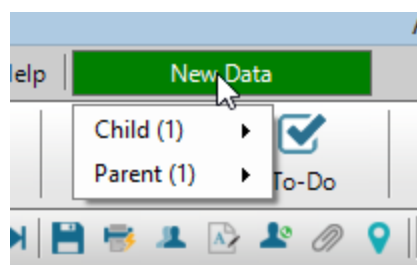
A screenshot of a software configuration window titled "Form Series". The window has a blue header and a red close button. The main content area is titled "Forms and Transitions" and contains the instruction "Select up to 3 forms for the series and define the transition between them." Below this, there are three rows of form configuration. The first row is for "Form 1" (set to "Parent"), "Transition to Form 2 is:" (set to "Optional"), and "Transition Link Text:" (set to "Do you wish to register a child?"). The second row is for "Form 2" (set to "Child"), "Transition to Form 3 is:" (set to "Automatic"), and "Transition Link Text:" (empty). The third row is for "Form 3 (optional):" (empty) and "Transition Link Text:" (set to "Relationship Form 1/Form 2..."). At the bottom, there is a "Last Form:" section with a checked "Allow Multiple Entries" checkbox and a "Multiple Entry Link Text:" field set to "Click to register another child". At the very bottom of the window are three buttons: "< Previous", "Save", and "Cancel".

Once the user registers his first child information, he can register another one.

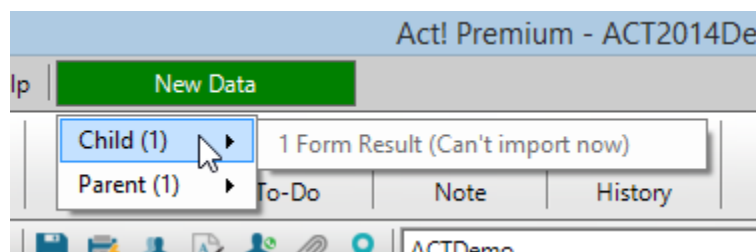


Importing form series data

Like with any data submitted through Automatic Web Forms, you get a notification within ACT!. Since data from multiple forms have been submitted, you will see something similar to this.



The import related to the first form must be imported before the one related to the second form.



Only once the parent record is created, will the child be available to be imported as well.

Contacting support

Support is provided through our ticket system at <http://support.exponencial.com>.