

# Automatic Web Forms II

for ACT! 2011 and up



## User's manual – part 2

How to use the layout editor and customize the display of your fields

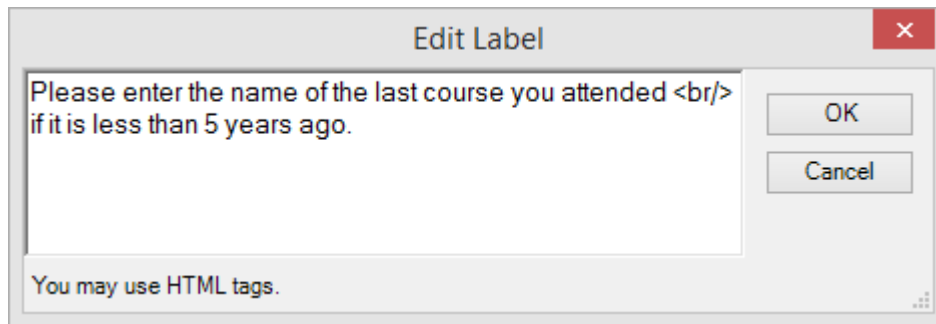
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Now that you have seen how to create a basic form, let us look in more details into the field and label options available in the third screen of the form wizard.

To edit your form, launch the add-on by double-clicking the notification area on your ACT! menu bar, make sure your form is selected in the drop-down list of the main window of Automatic Web Forms, then go to *Forms>Edit Form>Basic Details...* Then, go to the *Field labels and options* screen.

## Editing labels

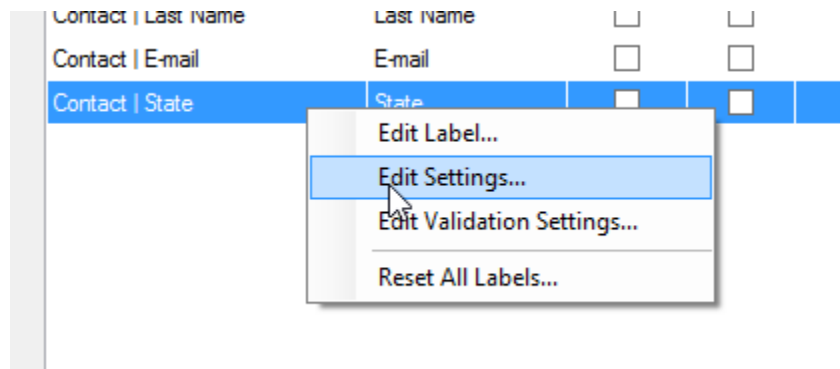
By default, labels take the name of their field. In many cases, you will want to change this. To edit the label, either click it and type directly in the window or double-click it to pop up the *Edit label* window.



You may use any HTML code you want. If you don't know HTML, the most useful tag in this window is probably the line break which is "<br/>" as shown above.

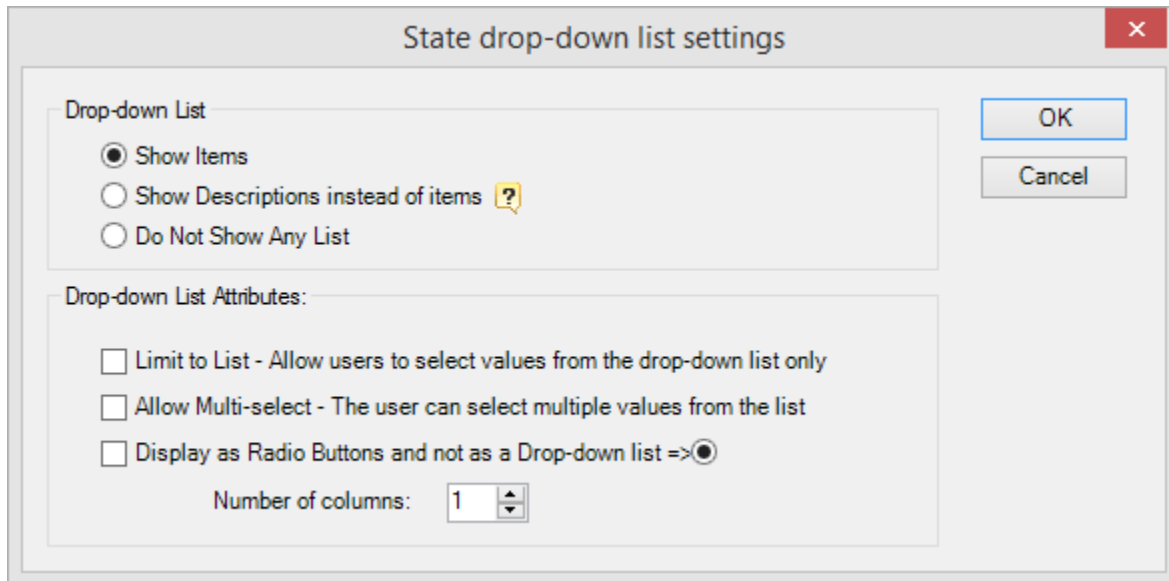
## Accessing field options

Each type of field might have different options. To access these options, right-click the field and select *Edit Settings....* The Edit Settings window will display different options for different type of fields.



## Options for fields with a drop-down list

Here are the options for fields with a drop-down list:



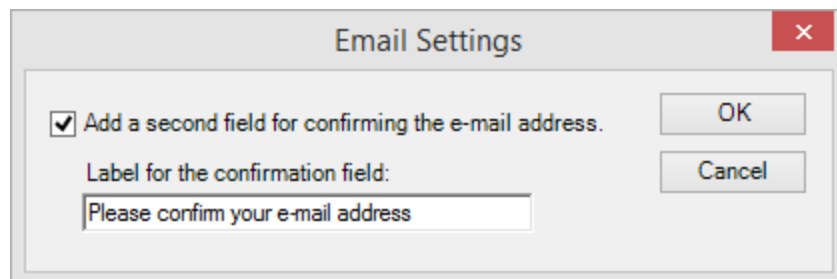
The dialog box is titled "State drop-down list settings" and has a close button (X) in the top right corner. It contains two main sections:

- Drop-down List:** This section contains three radio button options:
  - Show Items
  - Show Descriptions instead of items ?
  - Do Not Show Any List
- Drop-down List Attributes:** This section contains three checkbox options:
  - Limit to List - Allow users to select values from the drop-down list only
  - Allow Multi-select - The user can select multiple values from the list
  - Display as Radio Buttons and not as a Drop-down list =>

At the bottom of the "Drop-down List Attributes" section, there is a label "Number of columns:" followed by a spinner box containing the number "1".

On the right side of the dialog, there are two buttons: "OK" and "Cancel".

## Option for e-mail fields: add a second field for confirmation



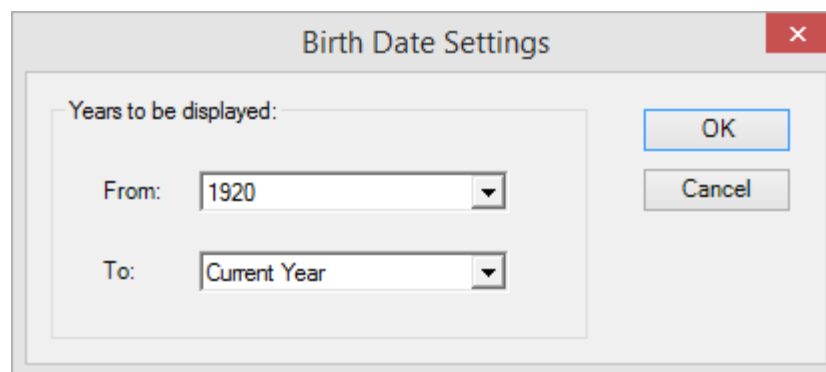
The dialog box is titled "Email Settings" and has a close button (X) in the top right corner. It contains the following elements:

- A checked checkbox:  Add a second field for confirming the e-mail address.
- A text input field labeled "Label for the confirmation field:" with the text "Please confirm your e-mail address" entered.

On the right side of the dialog, there are two buttons: "OK" and "Cancel".

## Option for date fields

For date fields, the option is the year that you want displayed. It makes no sense to display years for 1900 to 2200 if you are asking for a birth date or for a future date. This is where you would set this up.

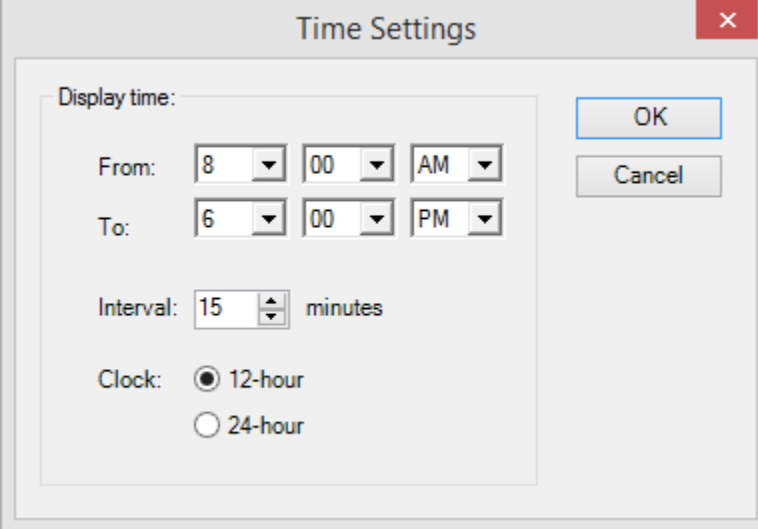


The dialog box is titled "Birth Date Settings" and has a close button (X) in the top right corner. It contains the following elements:

- A label "Years to be displayed:" followed by two dropdown menus:
  - "From:" with the value "1920" selected.
  - "To:" with the value "Current Year" selected.

On the right side of the dialog, there are two buttons: "OK" and "Cancel".

## Options for time fields

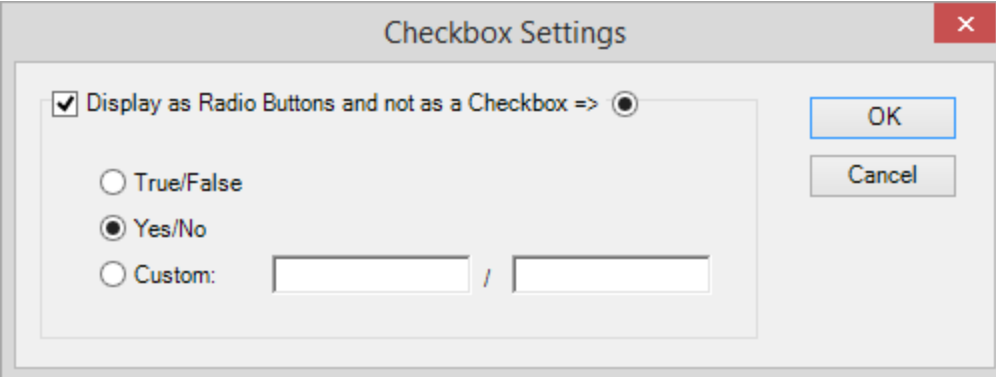


The Time Settings dialog box is titled "Time Settings" and has a close button (X) in the top right corner. It contains a "Display time:" section with the following options:

- From:** 8 (hour), 00 (minute), AM (period)
- To:** 6 (hour), 00 (minute), PM (period)
- Interval:** 15 (minutes)
- Clock:**  12-hour,  24-hour

Buttons for "OK" and "Cancel" are located on the right side of the dialog.

## Option for checkboxes

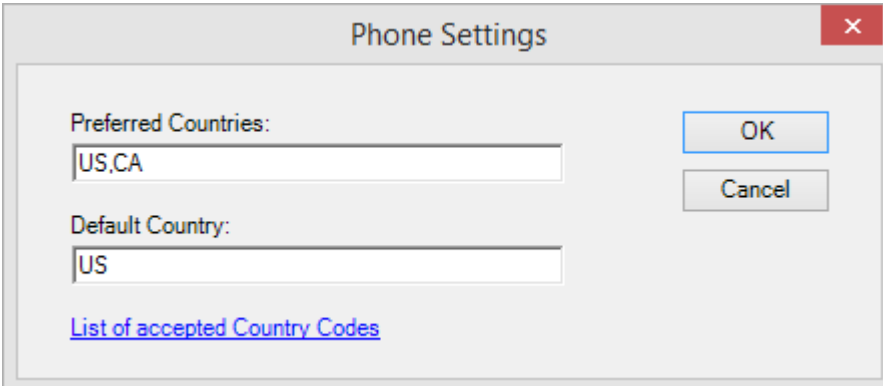


The Checkbox Settings dialog box is titled "Checkbox Settings" and has a close button (X) in the top right corner. It contains the following options:

- Display as Radio Buttons and not as a Checkbox =>
- True/False
- Yes/No
- Custom: [ ] / [ ]

Buttons for "OK" and "Cancel" are located on the right side of the dialog.

## Option for phone fields

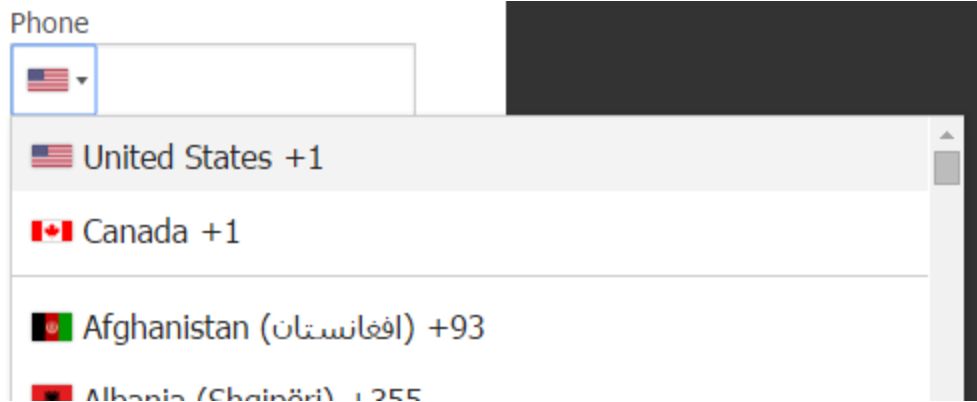


The Phone Settings dialog box is titled "Phone Settings" and has a close button (X) in the top right corner. It contains the following options:

- Preferred Countries:** [US,CA]
- Default Country:** [US]
- [List of accepted Country Codes](#)

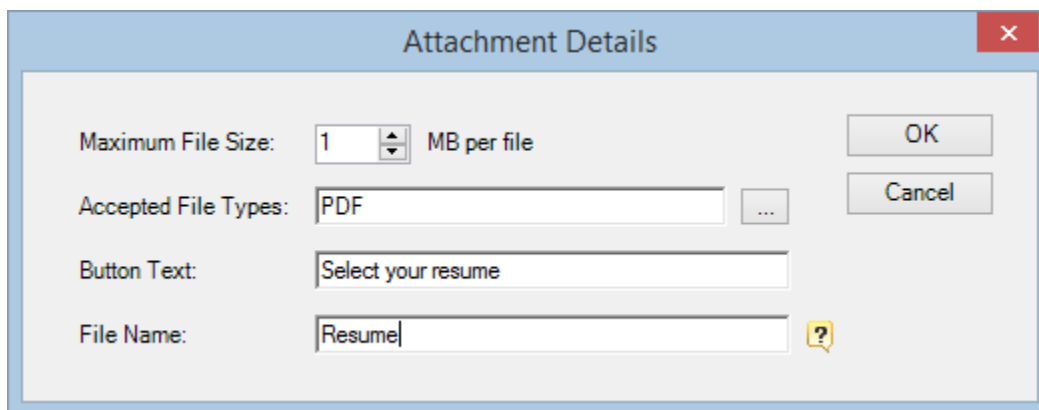
Buttons for "OK" and "Cancel" are located on the right side of the dialog.

Phone fields contain a country drop-down list. You have the ability to define a set of countries to be the “preferred countries” and they will appear at the top of the list. The default country is the country you want preselected when the form is displayed.



## Option for file attachments

When you include file attachments, you can limit the size of the attachment and the type of files. The File name is the name that will appear in the Column name of your documents tab once the file has been imported.



## Using the layout editor

Whatever its width, you should now view your form as being divided in 12 virtual columns with the possibility of having one field per column. Hence you could have up to 12 fields per row.

Putting 12 fields on one row might be pushing it as it might not render too well because the width of the columns will be proportional to your viewer's screen... but this could work if your form is private and you know your viewers will use large desktop screens.

Please note that this is totally independent from the form width. If the width of the form is set to 5/12<sup>th</sup>, this does not mean you can only have 5 columns. You always have 12 columns. Only the column width is affected by the form width.

Again smartphone users are not affected. They will always see one field per line because the screen is too small.

The layout editor is accessed through *the Forms>Edit Form>Layout...* menu. Each field has 3 properties.

The Span is the number of columns the field will span, i.e. it can go from 1 to 12. 12 means that it is as wide as the form. 6 means that it will cover half the form.

The Offset is the number of blank columns you want to appear on its left. Typically you'll set it to 0 unless you want to create a blank space.

*Force New Row* forces the creation of a new row even if the field could fit on the same row as the previous field. By default, a field is added to the previous row if it fits. Let's say you have 3 fields with a span of 6, 4 and 2: they will appear on the same row because  $6+4+2=12$ . On the other hand, if they have a span of 6, 4 and 3, the last field will appear on the next row because  $6+4+3=13$  and a row has 12 columns.

Here are a couple of examples to illustrate these properties. 4 fields with a span of 6.

Form Layout

Each row has 12 columns, no matter the width of the form.

| Field Name           | Span | Offset | Force New Row                       |
|----------------------|------|--------|-------------------------------------|
| Contact   First Name | 6    | 0      | <input checked="" type="checkbox"/> |
| Contact   Last Name  | 6    | 0      | <input type="checkbox"/>            |
| Contact   E-mail     | 6    | 0      | <input type="checkbox"/>            |
| Contact   Phone      | 6    | 0      | <input type="checkbox"/>            |

Span: 12

Modify

OK  
Cancel  
Apply

Click to view your form: [Test](#)

Form

First Name  Last Name

E-mail  Phone

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Send Request

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If we want the Phone number to appear on a new row, we check the “Force New Row” box.

Form Layout

Each row has 12 columns, no matter the width of the form.

| Field Name           | Span | Offset | Force New Row                       |
|----------------------|------|--------|-------------------------------------|
| Contact   First Name | 6    | 0      | <input type="checkbox"/>            |
| Contact   Last Name  | 6    | 0      | <input type="checkbox"/>            |
| Contact   E-mail     | 6    | 0      | <input type="checkbox"/>            |
| Contact   Phone      | 6    | 0      | <input checked="" type="checkbox"/> |

Span: 12

Buttons: OK, Cancel, Apply, Modify


Click to view your form: [Test](#)

### Form

First Name  Last Name

E-mail

Phone

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If we want the phone number to be wider and centered, we can change its span to 8 columns instead of 6 and set its offset to 2. The field will now appear with 2 blank columns on its left (it therefore appears centered as there are 12 columns: 2 on the left, 2 on the right).

Form Layout

Each row has 12 columns, no matter the width of the form.

| Field Name           | Span | Offset | Force New Row                       |
|----------------------|------|--------|-------------------------------------|
| Contact   First Name | 6    | 0      | <input type="checkbox"/>            |
| Contact   Last Name  | 6    | 0      | <input type="checkbox"/>            |
| Contact   E-mail     | 6    | 0      | <input type="checkbox"/>            |
| Contact   Phone      | 8    | 2      | <input checked="" type="checkbox"/> |

Span: 12

Buttons: OK, Cancel, Apply, Modify


Click to view your form: [Test](#)

### Form

First Name  Last Name

E-mail

Phone

I'm not a robot  reCAPTCHA  
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## **Don't forget to test**

Don't try to add too many fields in one row as the fields will end up too narrow. If you want to test the way it looks on smaller screen, simply resize the window of your browser. The fields will adjust themselves automatically.

## **Contacting support**

Support is provided by e-mail at [support@exponencial.com](mailto:support@exponencial.com).

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