

Automatic Web Forms II

for ACT! 2011 and up



User's manual – part 5

How to use pages or sections

Adding pages or sections	2
Difference between pages and sections	4
Organizing the workflow of your pages	5
Contacting support	8

To create pages or sections, 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>Pages or sections...*

Adding pages or sections

To create pages or sections, you need to create group of fields. Make sure your fields are in the right order before beginning to organize them in groups. To edit the order of the fields, go to *Forms>Edit Form>Basic Details* and on the third screen of the wizard, select the field you want to move and use the up and down buttons on the right of the list.

Form Basic Details

Field Map
Select the fields you want included in the form. Make sure you check the selection order as they will appear in the form in the same order.

Available fields:

- Contact | Address 3
- Contact | Alternate Extension
- Contact | Alternate Phone
- Contact | Anniversary
- Contact | Attachment
- Contact | Blog
- Contact | Cabinet
- Contact | Closed Date
- Contact | Company
- Contact | Contract Date
- Contact | Country
- Contact | Department
- Contact | Email Permission
- Contact | Extension

Selected fields:

- Contact | First Name
- Contact | Last Name
- Contact | E-mail
- Contact | Address 1
- Contact | City
- Contact | Address 2**
- Contact | ZIP Code
- Contact | State
- Contact | Birth Date
- Contact | Spouse

Buttons: Cancel, < Previous, Next >, Apply, OK

Back to the Page or Sections window. To create field groups, select the last field of the first group, then select the last field of the second group and so on.

Pages or Sections

Display Field Groups:

As Different Pages

As Sections of the Same Page Use borders

Field Group Definition:

	First Field of Group:	Last Field of Group:	Title:	Introductory
Page 1:	Field 1 (First Name)	▼		
Page 2:		Field 1 (First Name) Field 2 (Last Name) Field 3 (E-mail) Field 4 (Address 1) Field 5 (Address 2) Field 6 (City) Field 7 (State)		
Page 3:				
Page 4:				
Page 5:				
Page 6:				

You may give a title to each group as well.

Pages or Sections

Display Field Groups:

As Different Pages

As Sections of the Same Page Use borders

Field Group Definition:

	First Field of Group:	Last Field of Group:	Title:	Introductory
Page 1:	Field 1 (Contact First N	Field 3 (Contact E-mail) ▼	Basic Information	
Page 2:	Field 4 (Contact Adresse	Field 8 (Contact State) ▼	Address	
Page 3:	Field 9 (Contact Birth D	Field 10 (Contact Spouse) ▼	Personal Information	
Page 4:		▼		
Page 5:		▼		
Page 6:		▼		

Difference between pages and sections

If you choose to display groups As Different Pages, you get something like the form below, with a *Next* button and *Previous* and *Next* buttons on the subsequent pages.

Basic Information

First Name	<input type="text"/>	Last Name	<input type="text"/>
E-mail	<input type="text"/>	Please confirm your e-mail address	<input type="text"/>

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Address

Address 1	<input type="text"/>	Address 2	<input type="text"/>
City	<input type="text"/>	ZIP Code	<input type="text"/>

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The captcha will appear only in the last page.

If you select the option to display groups *As Sections of the Same Page*, you get something like the form below (Note: to give a different background color to the sections, go to *Forms>Edit Form...>Style* and look for *Group Background Color* under the *Colors* tab).

Registration

Basic Information

First Name	Last Name
<input type="text"/>	<input type="text"/>
E-mail	Please confirm your e-mail address
<input type="text"/>	<input type="text"/>

Address

Address 1	Address 2
<input type="text"/>	<input type="text"/>
City	ZIP Code
<input type="text"/>	<input type="text"/>

Personal Information

As you can see sections are great to organize your fields in a single page.

Organizing the workflow of your pages

If you select the option to display groups *As Different Pages*, you may control the sequence of your pages by specifying the next page.

Title:	Introductory Text (HTML):	Next Page:
Basic Information	<input type="text"/>	<input type="text"/>
Address	<input type="text"/>	<input type="text"/>
Personal Information	<input type="text"/>	<ul style="list-style-type: none"> Page 1 (Basic Information) Page 2 (Address) Page 3 (Personal Information)
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

This is not necessarily useful in the example we just set up. The logic is to go from page 1 to page 2 and then page 3 and you do not have to specify the next page for this. Automatic Web Forms will assume if you have not set a next page that the following group is the next page.

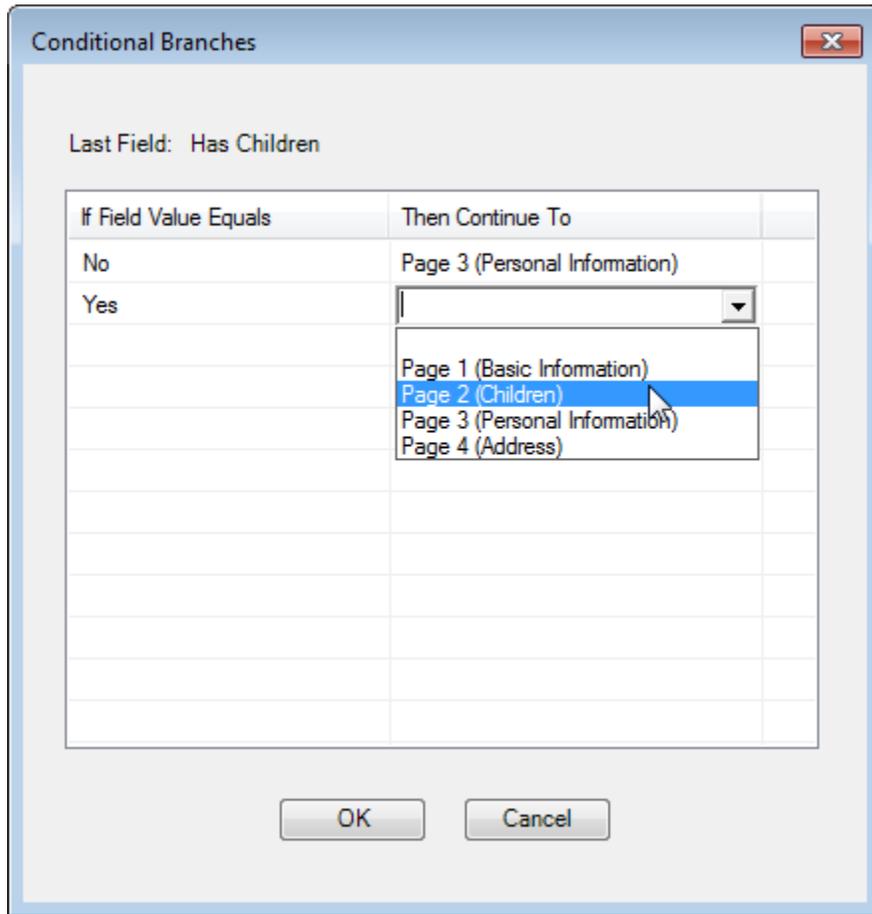
But if the last field of your page is a Yes/No field or a field with a drop-down list and user entry is limited to this list, you may use conditional branches. Here is an example. By adding a Yes/No field to the form and making it the last field of the first page, you now have an additional option in the *Next Page* drop-down called *Conditional Branches*.

Last Field of Group:	Title:	Introductory Text (HTML):	Next Page:
Field 4 (Has Children)	Basic Information	<input type="text"/>	<input type="text"/>
Field 5 (Number of children)	Children	<input type="text"/>	<ul style="list-style-type: none"> Page 1 (Basic Information) Page 2 (Children) Page 3 (Personal Information) Page 4 (Address) Conditional Branches
Field 7 (Spouse)	Personal Information	<input type="text"/>	<input type="text"/>
Field 12 (ZIP Code)	Address	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

If you select it and then click the ... button next to it to open the Conditional Branches window.

Next Page:
<input type="text"/> <input type="text"/>
<input type="text"/> <input type="text"/>

In the *Conditional Branches* window, you get the list of possible values (Yes or No in this case, the list of drop-down items if it is a field with a drop-down list) and you may associate a *Next Page* to each of these values.



Finally you should end up with a work flow like this one where Page 2 would be displayed only if the user checked the Has Children field.

Last Field of Group:	Title:	Introductory Text (HTML):	Next Page:
Field 4 (Has Children) ▼	Basic Information		Conditional Branches ▼
Field 5 (Number of children) ▼	Children		Page 3 (Personal Information) ▼
Field 7 (Spouse) ▼	Personal Information		Page 4 (Address) ▼
Field 12 (ZIP Code) ▼	Address		

This is particularly useful when creating surveys.

Contacting support

Support is provided by e-mail at support@exponencial.com.

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