

Automatic Web Forms II

for ACT! 2011 and up



User's manual – part 11

How to create a form series

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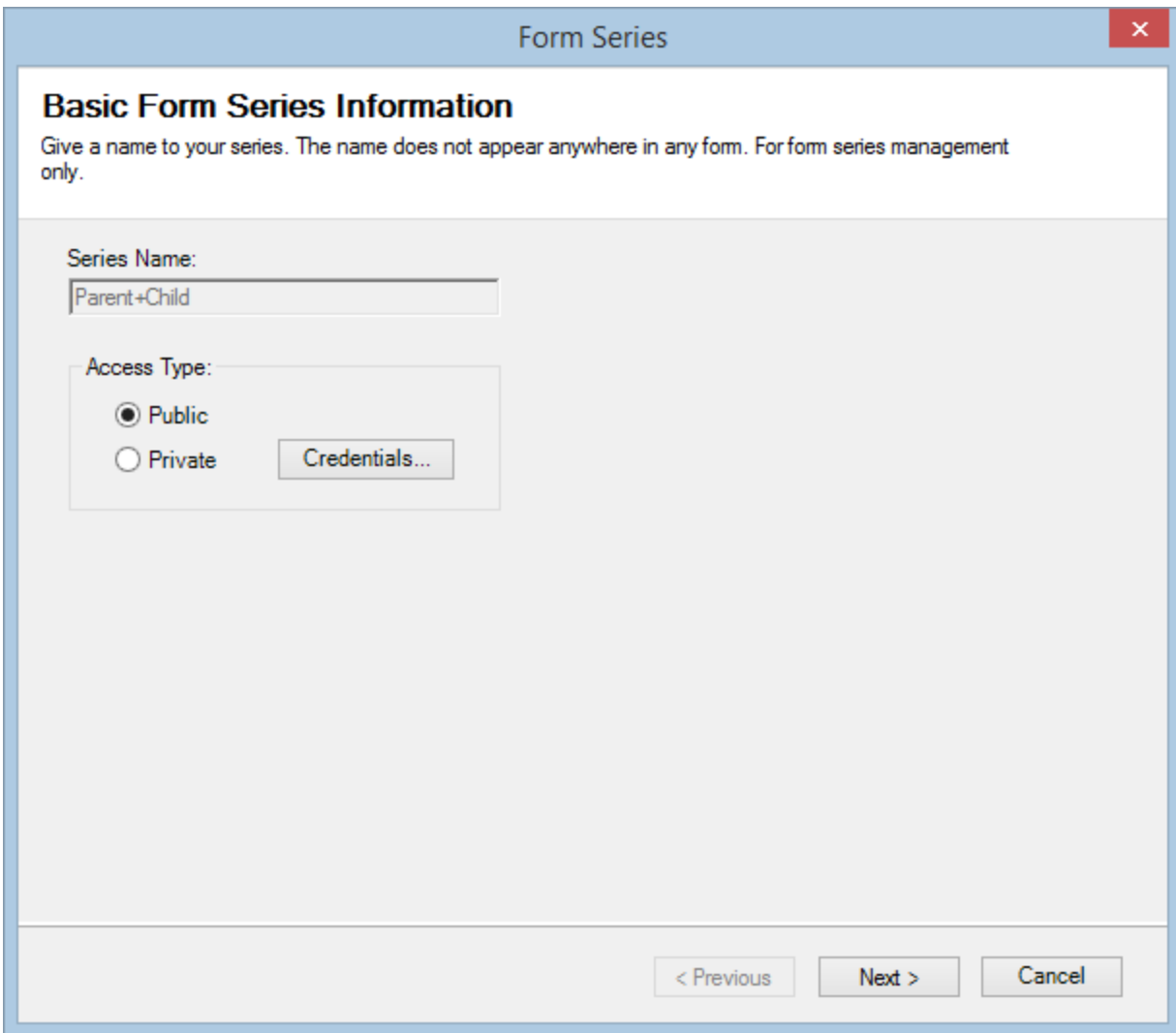
Form series gives you the ability to have your form users fill in several forms in a row. The data from each form will import as separate entities in ACT! but linked together.

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 is a "Series Name:" label followed by a text input field containing "Parent+Child". Underneath, there is an "Access Type:" label followed by two radio button options: "Public" (which is selected) and "Private". To the right of the "Private" option 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 'Form Series' dialog box is titled 'Form Series' and contains a section titled 'Forms and Transitions'. Below the title is the instruction: 'Select up to 3 forms for the series and define the transition between them.' The configuration is organized into three rows, each representing a form in the series:

- Form 1:** A dropdown menu is set to 'Parent'. To its right, 'Transition to Form 2 is:' has two radio buttons: 'Automatic' (unselected) and 'Optional' (selected). Further right, 'Transition Link Text:' has a text box containing 'Do you wish to register a child?'.
- Form 2:** A dropdown menu is set to 'Child'. To its right, 'Transition to Form 3 is:' has two radio buttons: 'Automatic' (selected) and 'Optional' (unselected). Further right, 'Transition Link Text:' has an empty text box.
- Form 3 (optional):** An empty dropdown menu. To its right, there is a button labeled 'Relationship Form 1/Form 2...'.

Below these rows is a 'Last Form:' section with a checkbox labeled 'Allow Multiple Entries' (which is unchecked) and a 'Multiple Entry Link Text:' text box. At the bottom of the dialog are three buttons: '< Previous', 'Save', and 'Cancel'.

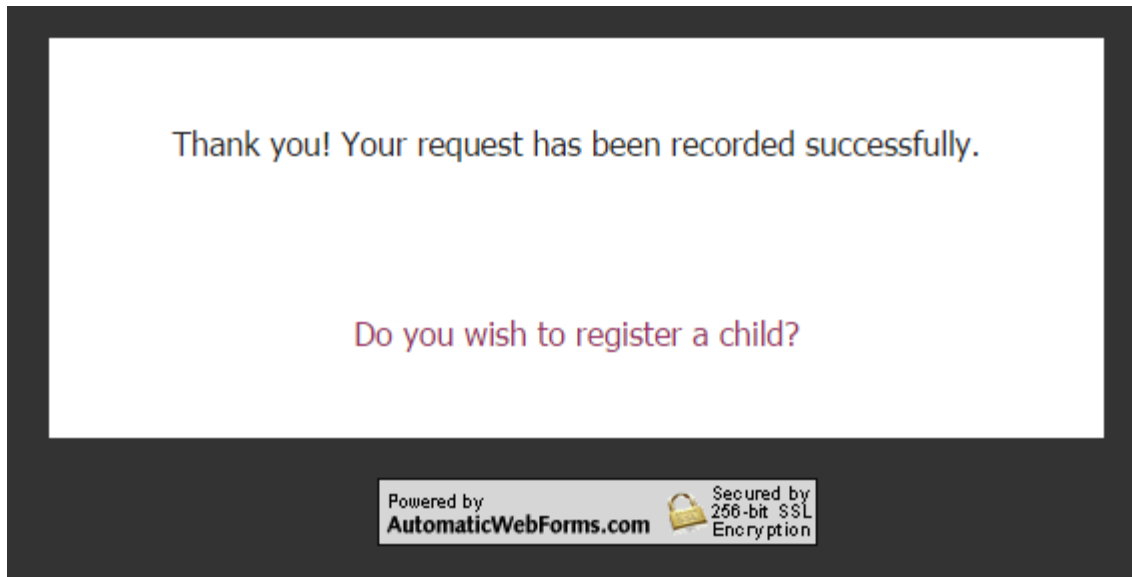
NOTE: Because the 2 forms are contact forms, you see a relationship Form1/Form2... button appear so that you may define a relationship (under the Relationship tab). If you click it, you get the list of relationships as defined in Act!.

The 'Relationship' dialog box is titled 'Relationship' and contains two dropdown menus for defining relationships between forms:

- Form 1 to Form 2 Relation:** A dropdown menu is set to 'Parent'.
- Form 2 to Form 1 Relation:** A dropdown menu is open, showing a list of relationship types: 'Child', 'Child', 'Client', 'Consultant', 'Coworker', 'Employee', 'Family', 'Friend', and 'Manager'. The first 'Child' entry is highlighted in blue.

At the bottom right of the dialog are 'OK' and 'Cancel' buttons. The word 'multiple' is partially visible on the left side of the dialog, and 'ld' is partially visible on the right side.

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.

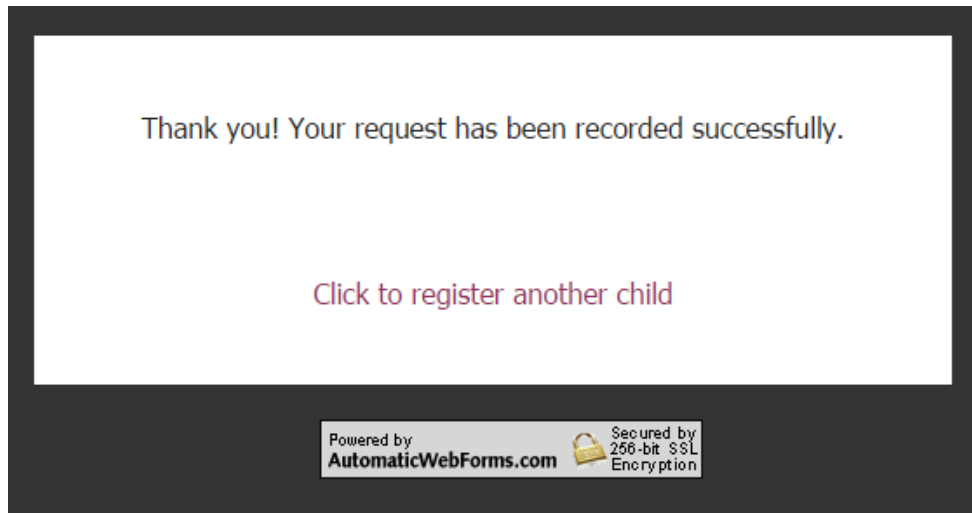


Allowing multiple entries for the last form

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.

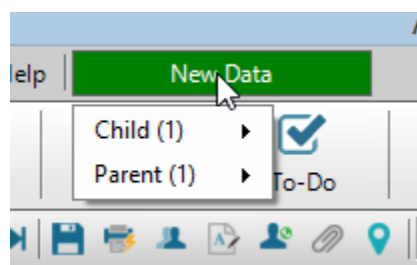
A screenshot of a software configuration window titled "Form Series". The window contains a section titled "Forms and Transitions" with the instruction "Select up to 3 forms for the series and define the transition between them." The configuration is organized into three rows for Form 1, Form 2, and Form 3 (optional).
- Form 1: "Parent" (dropdown), Transition to Form 2 is: "Optional" (radio button selected), Transition Link Text: "Do you wish to register a child?" (text box).
- Form 2: "Child" (dropdown), Transition to Form 3 is: "Automatic" (radio button selected), Transition Link Text: (empty text box).
- Form 3 (optional): (empty dropdown), Transition Link Text: "Relationship Form 1/Form 2..." (text box).
At the bottom, there is a "Last Form:" section with a checked box for "Allow Multiple Entries" and a "Multiple Entry Link Text:" field containing "Click to register another child".
The window has a close button (X) in the top right corner and navigation buttons "< Previous", "Save", and "Cancel" at the bottom.

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

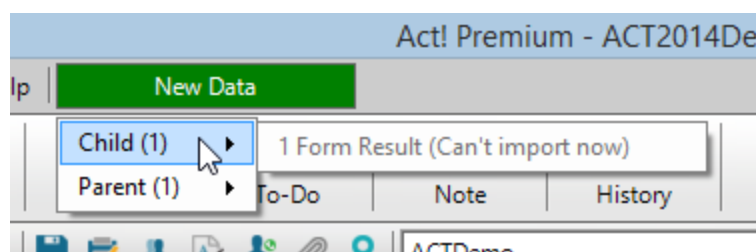


Importing form series data

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 by e-mail at support@exponencial.com.