

Upgrading to Automatic Web Forms II

Automatic Web Forms II is a major upgrade introducing these new features:

- *Forms are mobile-friendly, i.e. they adapt to the viewer's screen size*
- *You may now position multiple fields on the same line using the new layout editor*
- *You may now include fields from different Act! tables in the same form to create multiple records at once, without the need to create a series anymore*
- *File attachment "fields" are now positioned wherever you want in the form (they used to force the creation of a second page). You may have as many as you want and their position follows the field list order*
- *The phone, date and time selectors have been improved*
- *Our custom Captcha has been replaced by the new Google Captcha*

Installing Automatic Web Forms II

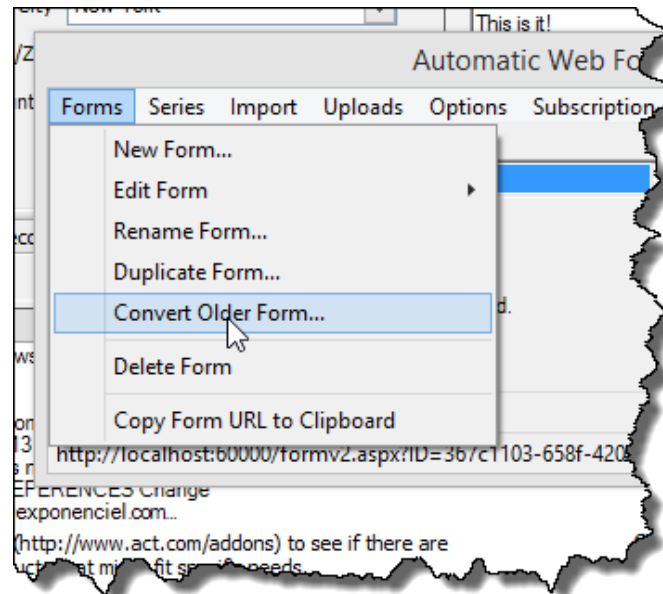
The new version can be download from:

http://exponencial.com/download/automaticwebformsII_download.exe

It does not replace the old version. Both versions may coexist so that you can keep both until you are done converting your existing forms at which point you can simply uninstall the old version.

Converting your existing forms

To convert an older form, launch AWF II and go to Forms>Convert Older Form... Doing so will not affect your existing form. It will create a new form, with a different URL and most of the characteristics of the original forms.



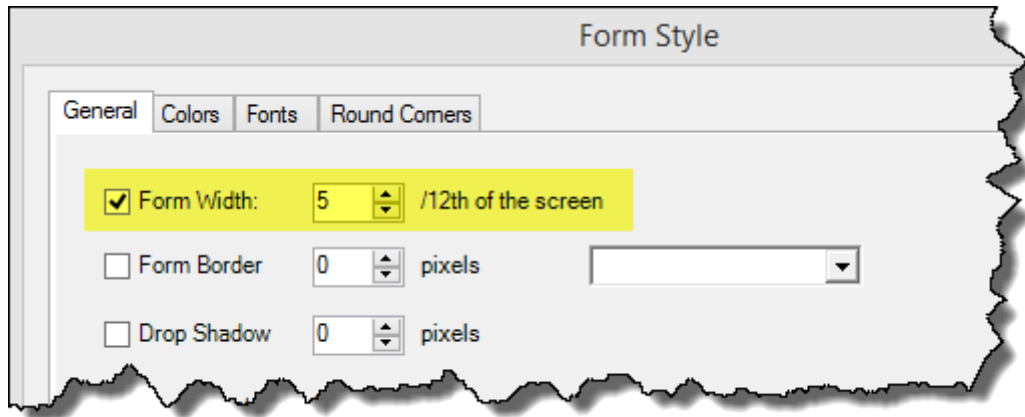
Because we introduced so many new features, your converted form may need to be adjusted.

Form layout: what's changed?

Because the forms are now mobile friendly, the width of the form is not set in pixels anymore. That's because we don't know if the viewer is viewing the form from his smartphone, tablet, laptop or desktop. A form that is 560px wide does not fit on a 500px wide screen.

To make your form work on all screens, the width is now set in 1/12th of the screen size. If you set the width to 5/12th, then it will be proportionally sized to 5/12 of the screen no matter the screen size.

Note: this does not apply to smartphones. On any screen less than 640px wide, your form always appears full-width.



If the width of the converted form does not look right, you can adjust it as before using the Form>Edit Form...>Style menu.

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 that 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 5/12th, 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, ie. 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

contrary 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 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


OK
Cancel
Apply
Modify


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

Form

First Name Last Name

E-mail Phone

I'm not a robot  reCAPTCHA
Privacy - Terms

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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

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).

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

Modify

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

Form

First Name Last Name

E-mail

Phone

I'm not a robot reCAPTCHA
Privacy - Terms

Send Request

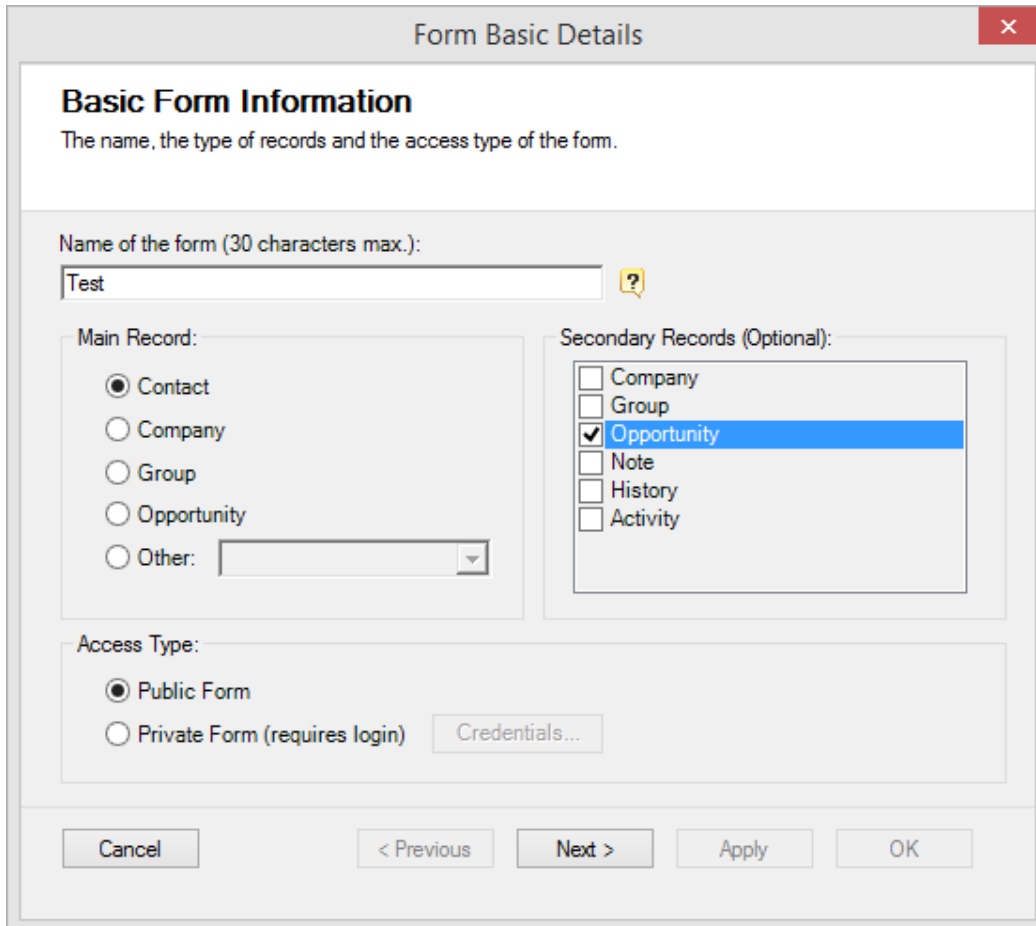
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Don't forget to test

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.

Using fields from different tables

When you create or edit a form, you now have the option to add secondary records. For instance, if you want to create a contact form and automatically create an opportunity associated with the contact, you check the Opportunity box in the Secondary Records list.



The image shows a dialog box titled "Form Basic Details" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Basic Form Information**: A sub-header with the text "The name, the type of records and the access type of the form."
- Name of the form (30 characters max.):**: A text input field containing "Test" and a help icon (question mark) to its right.
- Main Record:**: A group box containing five radio button options: "Contact" (selected), "Company", "Group", "Opportunity", and "Other:" followed by a dropdown menu.
- Secondary Records (Optional):**: A group box containing a list of checkboxes: "Company", "Group", "Opportunity" (checked and highlighted in blue), "Note", "History", and "Activity".
- Access Type:**: A group box containing two radio button options: "Public Form" (selected) and "Private Form (requires login)" with a "Credentials..." button to its right.

At the bottom of the dialog, there are five buttons: "Cancel", "< Previous", "Next >", "Apply", and "OK".

In the next screen, you can now add fields from the contact or opportunity tables. Don't forget you can hide fields and set a default value for them.

Field Name	Label	Mandatory	Hidden	Default Value
Contact First Name	First Name	<input type="checkbox"/>	<input type="checkbox"/>	
Contact Last Name	Last Name	<input type="checkbox"/>	<input type="checkbox"/>	
Contact E-mail	E-mail	<input type="checkbox"/>	<input type="checkbox"/>	
Opportunity Opportunity Name	Project Name	<input type="checkbox"/>	<input type="checkbox"/>	
Opportunity Stage	Stage	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Initial Comm...

You may add as many secondary records as you want. If you want to create a contact, a company, an opportunity and add a note to the contact, you can.

Carefully choose your main and secondary records

The main record and secondary records are not always interchangeable in the sense that they don't always produce the same result. A secondary record is always tied to the main record.

For instance, if your main record is a contact and your secondary records are company, opportunity and note, you'll get a new contact, a new company which the contact is going to be part of, a new opportunity associated with the contact and a contact note.

If your main record is a company and your secondary records are contact, opportunity and note, you'll get a new company, a new contact which will be part of the company (no difference here), a new opportunity associated with the company (but not with the contact) and a company note (not a contact note).

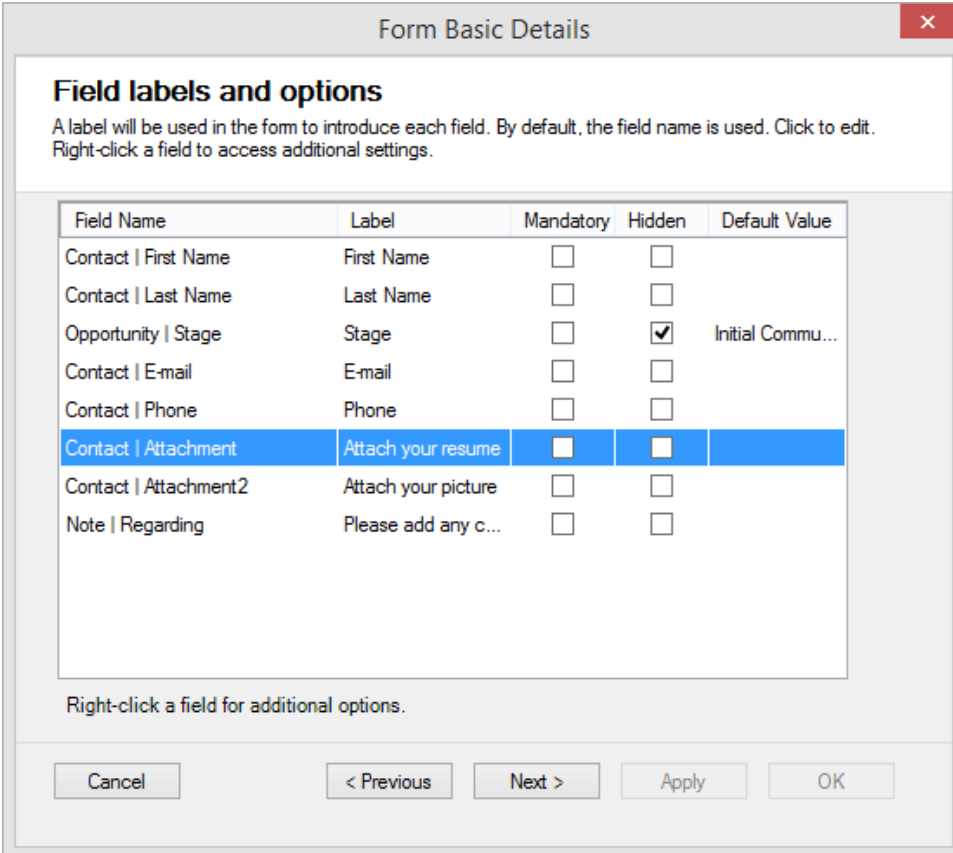
Duplicate checking

Also please note that, if set, duplicate checking only occurs on the main record.

New Controls

File Attachment

The file attachment virtual field can be added multiple times to your form. Each file has its own settings and is inserted in the regular field order.



The screenshot shows a dialog box titled "Form Basic Details" with a close button in the top right corner. The main content area is titled "Field labels and options" and contains a table with the following data:

Field Name	Label	Mandatory	Hidden	Default Value
Contact First Name	First Name	<input type="checkbox"/>	<input type="checkbox"/>	
Contact Last Name	Last Name	<input type="checkbox"/>	<input type="checkbox"/>	
Opportunity Stage	Stage	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Initial Commu...
Contact E-mail	E-mail	<input type="checkbox"/>	<input type="checkbox"/>	
Contact Phone	Phone	<input type="checkbox"/>	<input type="checkbox"/>	
Contact Attachment	Attach your resume	<input type="checkbox"/>	<input type="checkbox"/>	
Contact Attachment2	Attach your picture	<input type="checkbox"/>	<input type="checkbox"/>	
Note Regarding	Please add any c...	<input type="checkbox"/>	<input type="checkbox"/>	

Below the table, there is a note: "Right-click a field for additional options." At the bottom of the dialog, there are five buttons: "Cancel", "< Previous", "Next >", "Apply", and "OK".

Form

First Name

Last Name

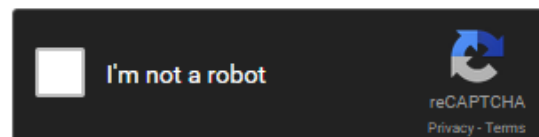
E-mail

Phone

Attach your resume

Attach your picture

Please add any comment

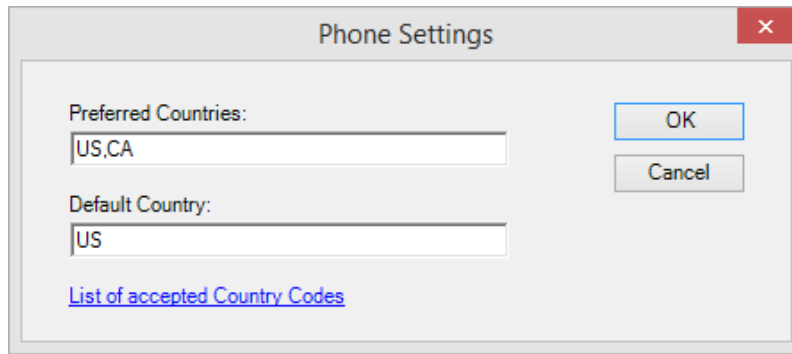


Send Request

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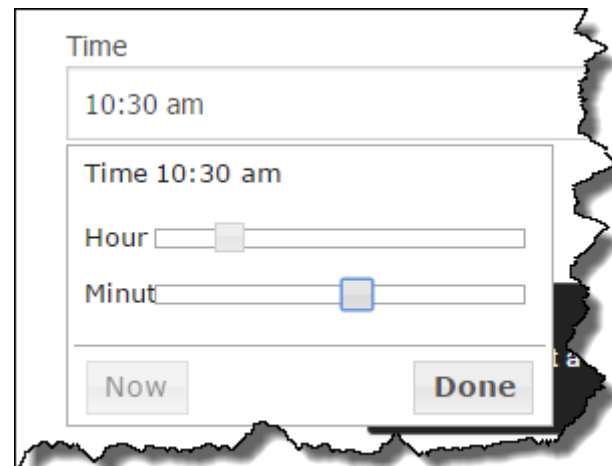
Phone Selector

The phone selector has been improved. The country code selector displays the flag of the selected country and allows to create a group of “preferred countries”.



Date and time Selector

The date and time selectors have been improved.



Google Captcha

The new Google Captcha is replacing our custom captcha. For more details, please see <https://www.google.com/recaptcha>