



# Updating ePages Custom Forms

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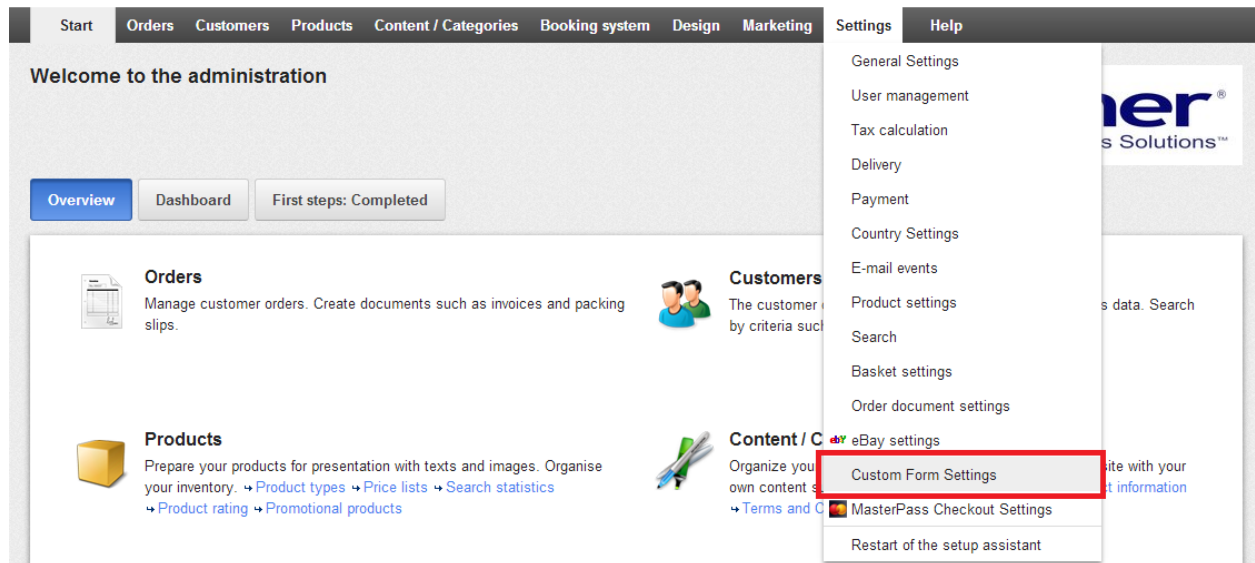
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## Reviewing the Old Form Builder (Legacy Custom Forms)

Go to Setting menu >> Custom forms setting



Open the custom form and you will see the fields that have been setup. You can also preview the form from the website. Each of the fields in the old custom form builder will need to be recreated in the new Custom Form.

**eCommerce Project Request for Quotation**

Company name

Given Name \*

Family Name \*

eMail Address \*

Alternative eMail Address

Business Phone \*

Mobile Phone \*

eCommerce Project \*  ⓘ

Project Description

Project Live Date

Country Location

Multiple Languages  Yes  No

Multiple Currencies  Yes  No




The dropdown menu for 'eCommerce Project' is expanded, showing the following options: B2B - Business to Business (selected), B2C - Business to consumer, B2C and B2B, SAP Business One eCommerce, Multi-store or Dropship, Mass Hosted Solution for Service Provider, Small Business Online Store, Partner opportunity, and Other. Information icons (i) are present next to the selected item and the 'Project Live Date' field.

Items like Drop Down lists will also need to be recreated with a similar data type in the New Customer Form.

You can also preview by looking at the website and printing the form which may help you when setting up the New Form fields.

### eCommerce Project Request for Quotation

Company name	<input type="text"/>
Given Name *	<input type="text"/>
Family Name *	<input type="text"/>
eMail Address *	<input type="text"/>
Alternative eMail Address	<input type="text"/>
Business Phone *	<input type="text"/>
Mobile Phone *	<input type="text"/>
eCommerce Project *	<input type="text" value="B2B - Business to Business"/> ⓘ
Project Description	<input type="text"/> ⓘ
Project Live Date	<input type="text" value="18"/> ⓘ
Country Location	<input type="text"/> ⓘ
Multiple Languages	<input type="radio"/> Yes <input type="radio"/> No
Multiple Currencies	<input type="radio"/> Yes <input type="radio"/> No
This request is urgent	<input type="radio"/> Yes <input type="radio"/> No ⓘ

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**NOTE:** The Captcha feature is no longer supported in the new Custom Forms.

## Creating a New Custom Form

Custom Forms are now created as content in Content and Categories and can exist as a sub-level within a category. You can create Custom Forms in Datasheet view or Preview mode.

### Datasheet mode

The screenshot shows a table of pages in Datasheet mode. A context menu is open over the 'Form' entry, with a red arrow pointing to it. The 'Form' entry is highlighted in the menu. Below the table, there is a form to create a new page, with a red box around the 'New page name' field and the text 'Enter a form name'.

Page / Category	1240
eCorner Upgrade 17th October 2013	1250
test-short-url	1260
intro-graphic	1270
homepage slider	1280
NZ Test	1290
Upgrade Alert - V6.16.3	1300
Quote form	1310
<b>Form</b>	9999

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### Preview mode

The screenshot shows the 'Add new page / category' dialog box in Preview mode. The 'Form' option is selected in the 'Type' list, and the 'Form' name is entered in the 'Name\*' field. The 'Insert' button is highlighted with a red box.

**Add new page / category**

Type: Page / Category, Content page, Forum, Blog, Guestbook, **Form**, Image gallery, Link, Promotional products

Name\*: **Form**

Visible:  Yes  No

\* required fields

Insert    Cancel

## Adding fields to the Custom Form

You can add as many fields as you want to your form. The data entered in these fields will be captured and sent to you in an email event.

The data is not stored anywhere on the ePages data base and is sent only via an email the same as the legacy custom form.

You can add fields of different types depending on what you want to achieve.

There is no field type of 'date' (see image below) in the new custom forms you must create a single line text entry field.

### Old Custom Form Builder date field

The screenshot shows a form builder interface with several fields. A red box highlights the 'Project Live Date' field, which includes a calendar icon and an information icon. Other fields include 'eCommerce Project \*' (a dropdown menu with 'B2B - Business to Business' selected), 'Project Description' (a multi-line text area), and 'Country Location' (a single-line text field). Below these are radio button options for 'Multiple Languages' and 'Multiple Currencies', each with 'Yes' and 'No' choices.

### Date field in New Custom Form

eCommerce project	Selection item	<input checked="" type="checkbox"/>	70	
Project description	Multi-line text field	<input type="checkbox"/>	80	
Project live date	Single line text field	<input type="checkbox"/>	90	
Country location	Single line text field	<input type="checkbox"/>	100	
Multiple languages	Check box	<input type="checkbox"/>	110	

**Edit form field: Project live date** ✕

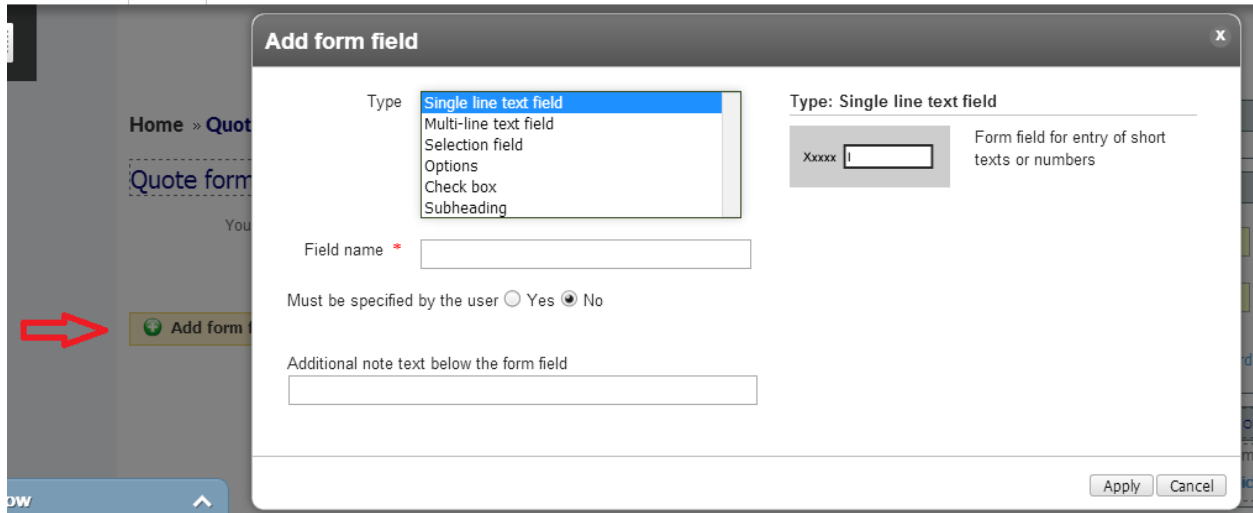
Type **Single line text field**

Field name \*  English

Must be specified by the user  Yes  No

Additional note text below the form field  
 English

## Preview mode



## Datasheet mode

Form field	Type	Required	Sort order	
Your e-mail address		<input checked="" type="checkbox"/>	<input type="text" value="10"/>	
Given name	Single line text field	<input checked="" type="checkbox"/>	<input type="text" value="20"/>	
Family Name	Single line text field	<input checked="" type="checkbox"/>	<input type="text" value="30"/>	
Alternative email address	Single line text field	<input type="checkbox"/>	<input type="text" value="40"/>	
Business phone	Single line text field	<input checked="" type="checkbox"/>	<input type="text" value="50"/>	
Mobile phone	Single line text field	<input type="checkbox"/>	<input type="text" value="60"/>	
eCommerce project	Selection field	<input checked="" type="checkbox"/>	<input type="text" value="70"/>	
Project description	Multi-line text field	<input type="checkbox"/>	<input type="text" value="80"/>	
Project live date	Single line text field	<input type="checkbox"/>	<input type="text" value="90"/>	
Country location	Single line text field	<input type="checkbox"/>	<input type="text" value="100"/>	
Multiple languages	Check box	<input type="checkbox"/>	<input type="text" value="110"/>	
Multiple currencies	Check box	<input type="checkbox"/>	<input type="text" value="120"/>	
This request is urgent	Check box	<input type="checkbox"/>	<input type="text" value="130"/>	
+ Add form field				

Saved

The fields that you create should match the fields that existed in the old form if you had one.

1. Single line of text
2. Text box for multiple lines of text
3. Selection field – drop down list
4. Options – multiple selections
5. Check box – indicates acceptance
6. Subheadings that can appear between fields
7. The field name you want to be seen on the form
8. Makes the field mandatory

9. Additional explanatory information that appears below the field
10. Apply – creates the new field

## Multiple selection and Options

Multiple selection and options fields need to have the selection values entered that will appear in the form. Click on the field name after it has been created and the selection entry box will appear.

You add additional values by clicking on the **Add value** link.



## General tab

### Text input

You can add text that will appear above your form on the website to explain the form or provide a description.

The screenshot shows the 'Settings' panel with the 'Texts' sub-tab selected. The 'Description' field is a rich text editor containing the text 'Online eCommerce quote request form'. Below it, the 'Long description' field is also a rich text editor, containing the text: 'Please provide as much information regarding your project as possible. One of our consultants will review the information and will contact you for further details. We will arrange to meet either by phone or in person if we need to discuss specific requirements. Once we have scoped the project and understand the requirements we will send you a proposal and Statement of Work.' The 'General' tab is highlighted with a red box.

### Settings input

The screenshot shows the 'Settings' panel with the 'Settings' sub-tab selected. The 'ID' field contains 'Quote\_form'. The 'Type' is set to 'Form'. The 'Visible on website' and 'Visible in the menu' options are both set to 'Yes'. The 'Permit display for' is set to 'All users'. The 'Title' field contains 'Quote form'. The 'Page title' field contains 'Quote form - eCorner Stores Plus'. The 'Short URL' field contains 'www.ecomerstoresplus.com.au/Quote-form'. The 'General' tab is highlighted with a red box.

**Unlike the legacy form the new form can appear as content in categories and in menus**

**You can custom define a short URL for the new form**

## Email event

Each new custom form that you create has its own email event that is accessed via the **E-mail receipt** tab in the Custom Form.

The screenshot shows the 'E-mail receipt' configuration interface. At the top, there are three tabs: 'General', 'Form fields', and 'E-mail receipt', with the latter being selected and highlighted with a red box. In the top right corner, there is an 'SEO' indicator with a yellow bar and the value '87%'. Below the tabs, a grey box contains the text: 'After the user has sent the form, you receive an e-mail. This e-mail contains all the information on the form. You can respond to the user in this e-mail.' The main configuration area is titled 'E-mail recipient' and includes three input fields: 'To \*' with the value 'info@ecorner.com.au' and a note 'Enter multiple addresses separated by a semicolon', 'Copy', and 'Blind copy'. Below this is the 'English' section with a 'Subject of e-mail \*' field containing 'Your message to us'. The 'Message after sending \*' section features a rich text editor with a toolbar (Format, Font, Size, Bold, Italic, Underline, Color) and a text area containing 'Thank you! We have received your message.' At the bottom left, there is a green 'Save' button.

## Form Preview

Unlike the older legacy custom forms you can now preview your form the same as any other content.

### Quote form

Please provide as much information regarding your project as possible. One of our consultants will review the information and will contact you for further details. We will arrange to meet either by phone or in person if we need to discuss specific requirements. Once we have scoped the project and understand the requirements we will send you a proposal and Statement of Work.

Your e-mail address \*

Given name \*

Family Name \*

Alternative email address

Business phone \*

Mobile phone

eCommerce project \*  ▼  
Let us know a little about your project

Project description

Project live date   
Estimated date that you want the project completed

Country location

Multiple languages

Multiple currencies

This request is urgent  
We will respond as soon as possible



Send

## Updating links to the form

The last step is to replace any links that you have on your website to the old custom forms with links to the new custom form. You should know where to find the links and you may need to change them using the Design Manager or in the website Content.

## Design manager – update link in navigation elements

Once you find the link if it exists in a navigation area like the top navigation or in the side or bottom navigation then you will need to change those using the Advanced design manager in the Design menu.

If these were done by a web designer then you may need them to make these changes.

The screenshot shows the 'Edit page element: Text with' dialog box in the eCorner design manager. The 'Link text' field is set to 'Quote - Click Here'. The 'Link' field is set to '?ObjectPath=/Shops/ecomerstoresplus/Categories/Quote\_form'. The 'Open link in a new window' checkbox is unchecked. A file tree on the right shows a folder named 'Quote form' highlighted with a red box. The 'Additional links' dropdown is set to '(Selection)'. The background shows a navigation menu with 'Customers', 'Products', and 'Content / Categories'.

## Update link in the content

This is done in a similar way to the above however you need to use the content Preview mode or Datasheet mode and select the location of the link to change it.

The screenshot shows the 'Content / Categories' view in the eCorner design manager. The 'Link text' field is set to 'Request a project quote'. The 'Link' field is set to '?ObjectPath=/Shops/ecomerstoresplus/Categories/Quote\_form'. The 'Open link in a new window' checkbox is unchecked. A file tree on the right shows a folder named 'Hosted eCommerce ...' highlighted with a red box. The 'Additional links' dropdown is set to '(Selection)'. The background shows a navigation menu with 'Start', 'Orders', 'Customers', 'Products', and 'Content / Categories'.

