

Forms Guide

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Introduction

Forms allow you to display information to a user, and also to save responses against a lead. Forms are standalone HTML pages (they load within an iFrame), so the layout and content is completely within your control.

It's also possible to use scripts (plain JavaScript or jQuery) to make forms interactive or load in external dependencies.

Creating a Form

Go to 'Settings > Forms > Add New Form' to create a new form. You can choose to make it available to leads in a specific group only, or in all groups.

A sample form will be created for you. You can choose to either edit from here, or clear the page completely and start from a blank page.

Forms are always available to use within workflows (lead group permitting), but the 'make this form accessible from the lead summary' option allows you to make the form available for a user to access whenever they want from a 'Forms' button on the lead summary. The user must have permission to access forms in this way ('Settings > Users > Edit').

If you don't select the 'make this form accessible from the lead summary' option, the form will only be available for use within workflows.

Collecting User Input

One of the most powerful features of forms is the ability to collect user input. Any information held against a lead that can be updated through the update lead API method (see 'Lead Create & Update API') can be updated through forms.

There's 2 ways to display an input field within a form:

1. The simplest method is using an {INPUT_?} variable. For example, to allow the user to update the customer's first name, use {INPUT_FIRST_NAME}. An input box will be inserted into the form in place of this variable, already populated with the current value.
2. You can also create your own form controls, and by using the corresponding 'name' attribute, they'll update the correct field. For example, using:

```
<input type="text" name="INPUT_FIRST_NAME">{LEAD_FIRST_NAME}</input>
```

You'll find a full list of the input specific template variables at the end of this guide.

Saving or Cancelling the Form

You have 2 options to control navigation:

1. Use {INPUT_SAVE} and {INPUT_CANCEL} to insert working save/cancel buttons into the form.
2. Call the JavaScript functions flgFormSave() or flgFormCancel().

For example, to save the form when a button with the ID 'save' is clicked, you could use the jQuery click trigger:

```
$('#save').click(function(event) {  
    event.preventDefault();  
    flgFormSave();  
});
```

Forms & Workflows

Forms become even more useful when you combine them together and add conditions as part of a workflow.

The most basic use of forms in workflows would be a simple string of forms, with 0 hours, 0 days between each one (i.e. the next one triggers as soon as the previous one has been completed). The 'pause until complete' option is always selected when using forms with workflows – this pauses the workflow until the form has been completed by the user.

After a form required as part of a workflow is completed, if another form needs completing, the user will automatically be shown the next form in the sequence.

Workflow conditions are also useful for adding conditional logic into your sequences of forms.

Considerations

- You don't need to use <form> tags in your HTML. The form controller will override any form actions if you do.
- Please don't use JavaScript to manipulate elements outside of the context of the form itself.
- You must explicitly reference an input field within the form to allow it to be saved. It's not possible to insert hidden fields using a script after the form loads and then have that hidden field value saved. Instead, add the hidden field to the form itself, and manipulate it with a script.

Available Input Variables

Variable Name	Information
INPUT_USER	Lead assigned user
INPUT_STATUS	Lead status
INPUT_TYPE	Lead type name
INPUT_SOURCE	Marketing source
INPUT_MEDIUM	Marketing medium
INPUT_TERM	Marketing term
INPUT_COST	Total cost of lead
INPUT_VALUE	Total value of lead
INPUT_TITLE	Customer's title
INPUT_FIRST_NAME	Customer's first name
INPUT_LAST_NAME	Customer's last name
INPUT_COMPANY	Company name
INPUT_JOBTITLE	Job title
INPUT_DOB_DAY	Date of birth day
INPUT_DOB_MONTH	Date of birth month
INPUT_DOB_YEAR	Date of birth year
INPUT_PHONE1	Phone number 1
INPUT_PHONE2	Phone number 2
INPUT_FAX	Fax number
INPUT_EMAIL	Email address
INPUT_ADDRESS	Address line 1
INPUT_ADDRESS2	Address line 2
INPUT_ADDRESS3	Address line 3
INPUT_TOWNCITY	Town or City
INPUT_POSTCODE	Postcode
INPUT_CONTACT_TIME	Preferred contact time (i.e. Anytime, Morning, Afternoon, Evening)
INPUT_CONTACT_PHONE	Permission to contact by phone
INPUT_CONTACT_SMS	Permission to contact by text message
INPUT_CONTACT_EMAIL	Permission to contact by email
INPUT_CONTACT_MAIL	Permission to contact by mail
INPUT_CONTACT_FAX	Permission to contact by fax
INPUT_DATA1 (1 to 50)	Data provided on lead, corresponding to data field in lead group