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# coreware | admin forms

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This guide contains:

- ▶ Introduction to forms
- ▶ Code Samples
- ▶ Demos

This guide assumes that you are knowledgeable in:

- ▶ SQL Database concepts
- ▶ Basic HTML, CSS and Javascript

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## Forms

### Introduction to Forms

CoreWare has built in to it a forms generator. The Forms Application can be used to create and maintain various input forms on your web site, including feedback forms, contact forms, registration forms, etc. The module is completely flexible and forms can be completely customized.

The forms module consists of three different components: Field Definitions, Form Definitions and Form Data.

The field definitions can be used to define form fields that will be used in one or multiple forms. Creating a global list of fields provides an efficient and consistent way to manage data across multiple forms.

The form definition is how the actual form looks when fields and other elements are brought together. The form data determines how the form will look and behave on a page.

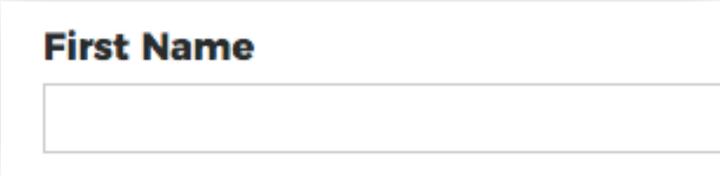
When forms are built in CoreWare, and people submit that form, the instances in the form gets saved to the database then a notification goes out. If the notification goes missing somehow, you will have a record of it in the database.

CoreWare also provides the traditional way of creating forms manually with HTML.

## Form Fields

When building forms, start with defining the fields first. To create the fields, go to **Forms > Field Builder**. Following is a description of the field types and settings of form fields.

**Simple Text** – For text input. You can add labels or placeholder value to let the user know what information they need to fill it with.

INPUT	OUTPUT
Field Type: Simple Text Label: First Name Control Name: not_null Control Value: false	



**Dropdown Choices** – For Dropdown fields. Choices can be a static list or dynamic (coming from a table column in the database).

**INPUT** **OUTPUT**

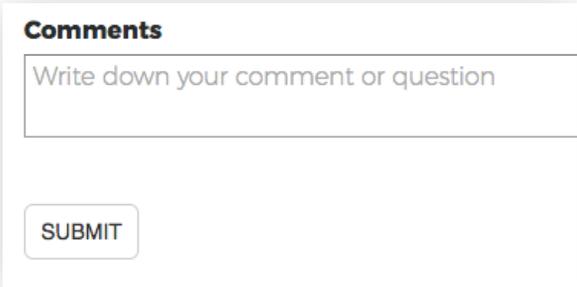
Field Type: Dropdown Choices  
Control Name: data\_type  
Control Value: select  
Choices: Choice1, Choice2,  
Choice3...

**INPUT** **OUTPUT**

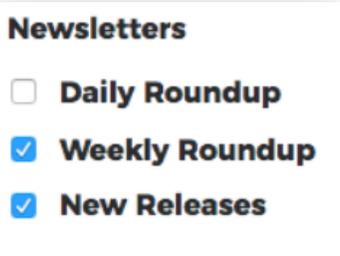
Field Type: Dropdown Choices  
Control Name: choices  
Control Value:  
`return $this->iDatabase->getControlRecords(array("table_name"=>"countries","description_field"=>"country_name"))`



**Multiline Text** – For fields where users need to fill in with comments, descriptions, suggestions etc.

INPUT	OUTPUT
<p>Field Type: Multi-line Text Control Name: placeholder Control Value: Write down your comment or question</p>	

**Checkbox** – For when users need to choose one or more from the given options.

INPUT	OUTPUT
<p>Field Type: Checkbox Control Name: data_type Control Value: tinyint</p>	



**Radio Button** – For when users need to choose only one from the given options.

**INPUT** **OUTPUT**

Field Type: Radio Button  
Control Name: data\_type  
Control Value: radio  
Choices: Choice1, Choice2,  
Choice3....

Feedback Type  Comment  Question  **Bug Report**

**Date** – Date selector for when users need to choose a specific date.

**INPUT** **OUTPUT**

Field Type: Date  
Control Name: data\_type  
Control Value: date

**Birth Date**  
07/20/1980

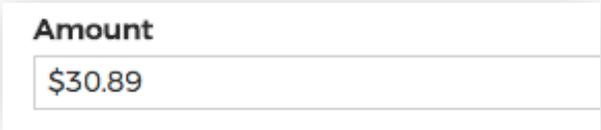
July 1980						
Su	Mo	Tu	We	Th	Fr	Sa
29	30	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
<b>20</b>	21	22	23	24	25	26
27	28	29	30	31	1	2



**Hidden Field** – for fields that are hidden from the user’s view but is required by other fields in the form. The most common example is country\_id. The country\_id field is required in contacts and is needed on the form for formatting phone numbers. However, if the client knows the country of the user is always US or doesn't really care about the value of country, it can be created as a hidden field with a default value. Sometimes a hidden field is populated by a value that is passed in the URL, such as www.domain.com/displayform.php?form\_type=control.

INPUT	OUTPUT
Field Type: Hidden Label: Country Control Value: United States	US Phone Format on Phone Fields

**Number Field** – for fields that only accepts numerical values with or without decimal like price and measurements.

INPUT	OUTPUT
Field Type: Number Control Name: data_type Control Value: decimal	



**Image** – for fields that let’s users upload a picture.

INPUT	OUTPUT
Field Type: Image Control Name: data_type Control Value: image_input	<b>Profile Picture</b> <input type="button" value="Choose File"/> studio.jpeg

**Integer** – for fields that only accepts whole numbers.

INPUT	OUTPUT
Field Type: integer Control Name: data_type Control Value: int	<b>Company</b> <input type="text"/> <b>Number of Employees</b> <input type="text" value="20"/>



**Uneditable texts** – for fields that can be set on a new record, but not editable on existing records. At times, for various reasons, there is a field that is set when a record is created and should not change after the record is created. For instance, the task type field, because it totally changes the fields used in the task, might be set to not editable. It is set when the task is created, but cannot change after that. Not editable fields are used throughout the system.

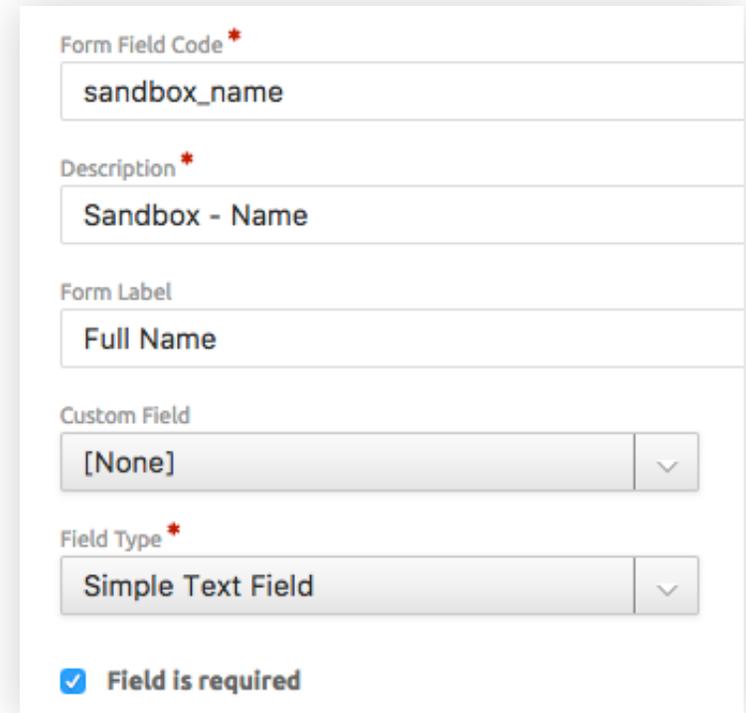
INPUT	OUTPUT
Field Type: Uneditable Text Label: Task Type	Task type is selected on creation but cannot be changed afterwards.

## Forms Demo - Basic

### Demo 1 - Define the fields with the Field Builder

Before we build the form, you will need to define the fields that would go into the form.

1. Go to **Tools > Forms > Form Field Builder**. Let's say you want to add the following fields into the form - **Name, Company, Email, Phone Number, Reason for Contact** and **Comments**.
2. Click **Add** to define a new field. For this demo, let's say the fields have the following definitions:

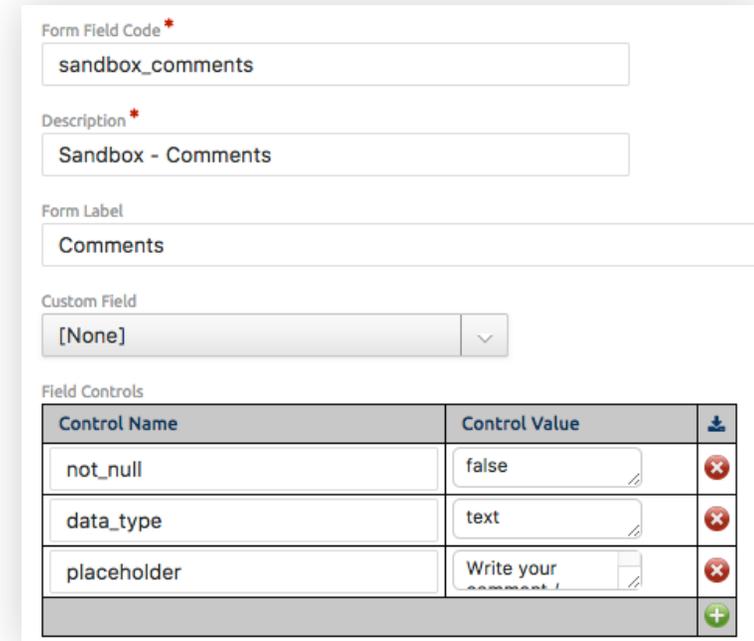


Define new fields

Form Label	Field Type	Required	Choices
Full Name	Simple Text Field	Yes	
Company	Simple Text Field	No	
Email	Simple Text Field	Yes	
Phone Number	Number	No	
Reason for Contact	Drop Down Choices	No	Request for Demo, Become a Partner Ask a Question, Get Some Help
Comments	Multi-line Text	No	

3. Set up the field controls for each field. Go to **Tools > Forms > Fields**. You'll find the new fields in this list.

4. You can customize each field further by adding maximum length, default values etc. For this demo, let's say the fields have the following control values:



The screenshot shows the 'Field Builder' interface for a field named 'sandbox\_comments'. It includes fields for 'Form Field Code', 'Description', 'Form Label', and 'Custom Field'. Below these is a 'Field Controls' table with columns for 'Control Name', 'Control Value', and a delete icon.

Control Name	Control Value	
not_null	false	
data_type	text	
placeholder	Write your comment or question	

Set up field controls

Form Label	Data Format	Maximum Length	Placeholder
Full Name	varchar	60	
Company	varchar	60	
Email	email	60	
Phone Number	phone	15	
Reason for Contact	select		
Comments	text	No	Write your comment or question

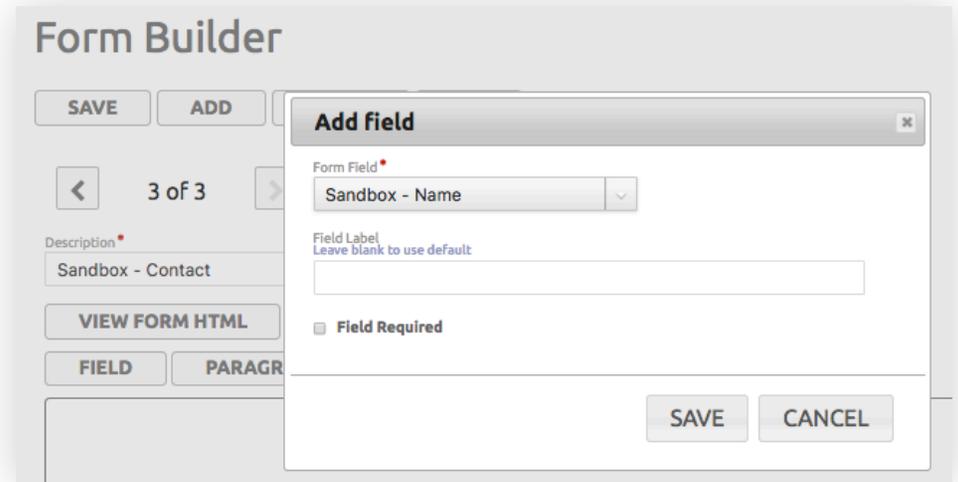
5. You may now begin building the form with the Forms Builder.

## Forms Demo - Advanced

### Demo 1 - Build the form with the Form Builder

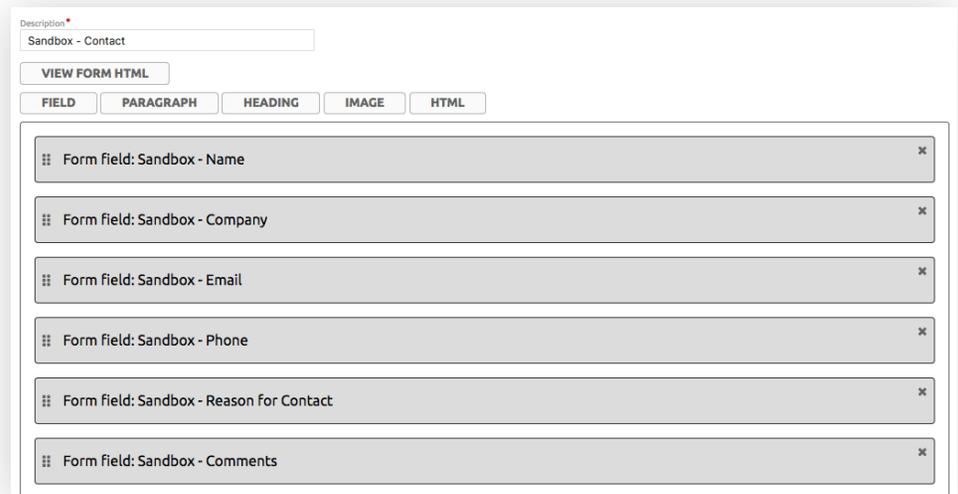
Build a new form and define the form structure with the Forms Builder.

1. To create a new form, create the form definition first. Go to **Forms > Definitions**. Click **Add**. Add a form code and description. Alternatively, you can create the form definition from the Forms Builder Maintenance program. Go to **Tools > Forms > Forms Builder**. Click **Add** to create a new form definition.
2. Click on the **Form tab** then click **Open in Form Builder**.
3. Click on the buttons for elements you want to add to the form. Add form fields with the **Field** button.



The screenshot shows the 'Form Builder' interface. A modal dialog box titled 'Add field' is open. It contains a dropdown menu for 'Form Field' with 'Sandbox - Name' selected. Below it is a text input field for 'Field Label' with the placeholder text 'Leave blank to use default'. There is a checkbox for 'Field Required' which is currently unchecked. At the bottom right of the dialog are 'SAVE' and 'CANCEL' buttons. In the background, the main interface shows 'SAVE' and 'ADD' buttons, a navigation bar with '3 of 3', a description field containing 'Sandbox - Contact', and buttons for 'VIEW FORM HTML', 'FIELD', and 'PARAGR'.

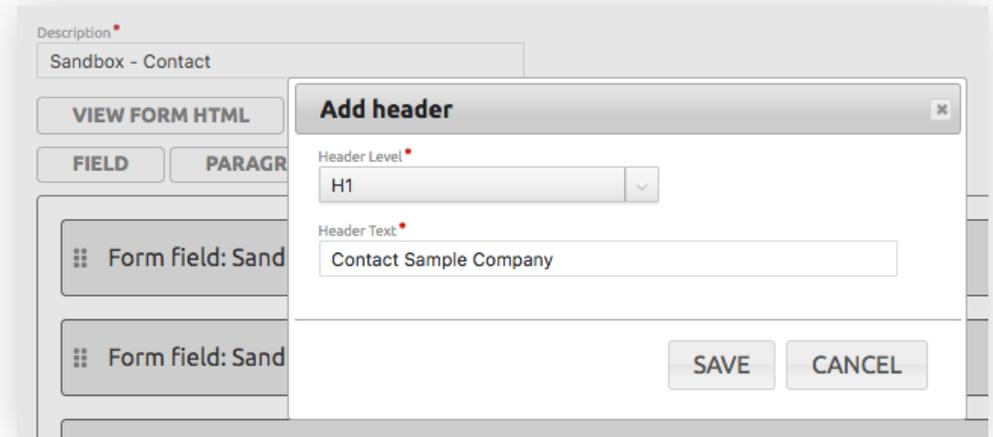
### Add fields



The screenshot shows the 'Form Builder' interface with the 'Add fields' dialog box open. The dialog displays a list of form fields to be added to the form. The fields are: 'Form field: Sandbox - Name', 'Form field: Sandbox - Company', 'Form field: Sandbox - Email', 'Form field: Sandbox - Phone', 'Form field: Sandbox - Reason for Contact', and 'Form field: Sandbox - Comments'. Each field entry has a double colon icon on the left and a close button (an 'x' in a square) on the right. Above the list, there is a 'Description' field containing 'Sandbox - Contact' and a 'VIEW FORM HTML' button. Below the description field are tabs for 'FIELD', 'PARAGRAPH', 'HEADING', 'IMAGE', and 'HTML', with 'FIELD' currently selected.



4. You can add images, headings, text and additional HTML for decoration.



Add elements

5. Rearrange the elements of the form by dragging.



Re-arrange elements



6. Save the new form. Go to **Forms > Definitions**. Click on the **Introduction tab**. You can add the Contact form introduction or instructions for filling up the form.

The screenshot shows a web interface for editing a form. At the top, there is a 'Description' field with the text 'Sandbox - Contact'. Below this is a horizontal menu with tabs: 'Details', 'Form', 'Javascript', 'Introduction', 'Response', 'Status', 'Controls', and 'Files'. The 'Introduction' tab is currently selected. Underneath the tabs, there is a 'Response Content' field (labeled as such in the image) containing the text 'Contact us about anything related to our company and services.'

**Add an introduction or instruction**

7. Click on the **Response tab**. You can add a response message that gets displayed after the user submits the form.

The screenshot shows the same web interface as the previous one, but now the 'Response' tab is selected in the horizontal menu. The 'Response Content' field now contains the text 'We'll get back to you as soon as possible.'

**Add a response message**





10. The **Contacts tab** enables you to create a contact after a form submission.

Contact category, contact type and mailing list

11. The **Submissions tab** enables you to export and view all form submissions in a CSV file.

Form submissions

### Demo 2 - Display the form on a page

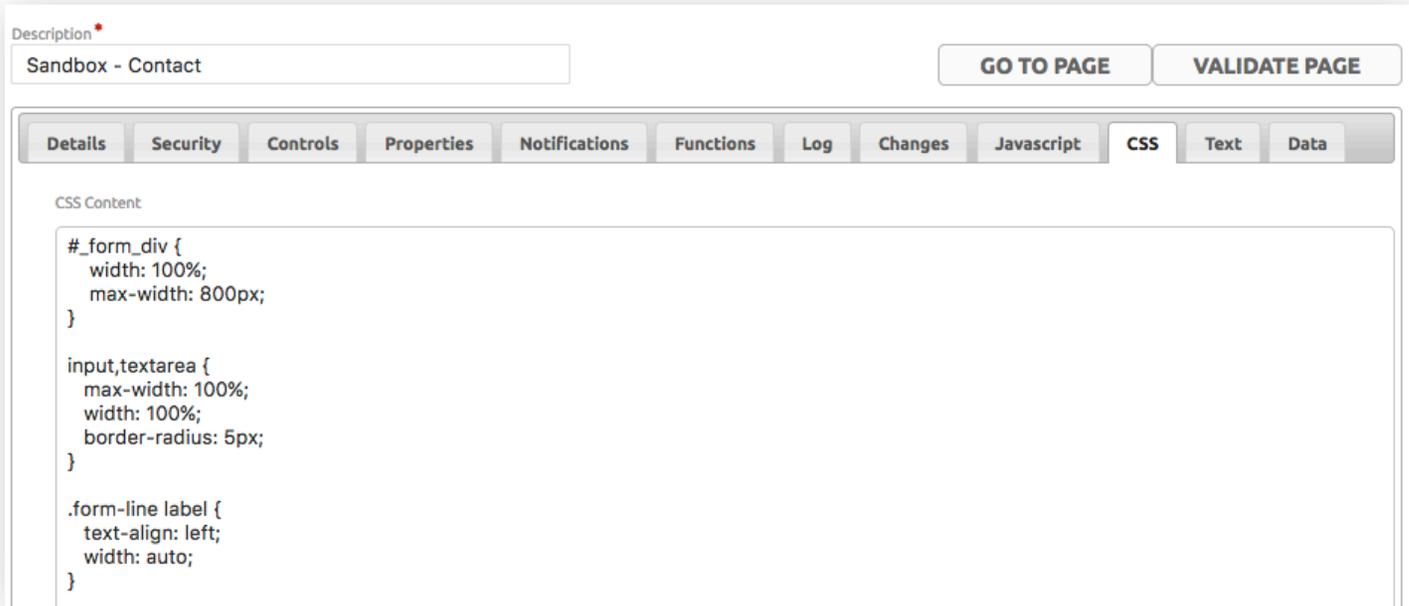
Create a page that will display the form and apply CSS to change the look of the form on the page.

1. We'll need to create a page that would display the form and apply additional content and CSS. Go to **Tools > CMS Tools > Page**.
2. Forms uses the "generateform.php" script file to read from the database and display data. This should be specified in the **Script Filename** field. If the page is a form, generateform.php is going to be the only script used by that page. In some rare circumstances, if there is a need for custom PHP on a form, there is a way to add an "actions" PHP file that is included in generateform PHP file.
3. Create the new page. Add a page code, description and link name.
4. Then, in the **Script Arguments** field, add the value pair, "code=form\_code\_here", so it would be displayed as it should be on the URL.
5. In the **Data tab**, add additional content as specified in the template used on this page.

Set up the PHP file to execute

Add additional content

6. Apply CSS in the **CSS tab**.



The screenshot shows the Form Builder interface. At the top, there is a "Description" field containing "Sandbox - Contact" and two buttons: "GO TO PAGE" and "VALIDATE PAGE". Below this is a horizontal menu with tabs: "Details", "Security", "Controls", "Properties", "Notifications", "Functions", "Log", "Changes", "Javascript", "CSS", "Text", and "Data". The "CSS" tab is selected. The main area displays "CSS Content" with the following code:

```
#_form_div {  
  width: 100%;  
  max-width: 800px;  
}  
  
input,textarea {  
  max-width: 100%;  
  width: 100%;  
  border-radius: 5px;  
}  
  
.form-line label {  
  text-align: left;  
  width: auto;  
}
```

Apply CSS

7. Save the changes you made to the form.



8. Preview the form by clicking on **Go to Page**. You will see the elements stacked in the order that you set up on the Form Builder.

9. To add, remove or re-arrange the order of the elements, Go to **Forms > Form Builder**. Open the form in the Form Builder.

**NOTE:** You can also manually arrange the elements and customize the form markup by converting it into a manual form. Go to **Forms > Definitions** and click the **Form tab**. You'll see an option to convert the form and edit manually. When converted, the form would not be editable from the Form Builder.

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## Contact Us

We're glad to help out!

Drop by the studio or drop us a line.

### Our Address

5375 Mira Sorrento Pl #400, San Diego, CA 92121, USA  
+1 858-398-6960  
Open: M-F 8AM - 9PM

Scranton Rd  
Scranton Rd, San Diego, CA 92121, USA  
View larger map

### Contact Form

Full Name  
Jeremy Adams

Company  
Mira Mesa

Email  
jeremyadams@gmail.com

Phone

Choose a reason for contacting us so we could get you the right person to talk to.

Reason for Contact **Ask a Question**

Comments  
How soon can I get the pictures?

Submit

### Demo 2 - Build a form that creates a contact record

For registration and subscription forms, you need to fill in this tab with information on how a new contact will be created after a user submits the form with his details.

1. After building the form, you can set it to create a new contact when submitted. For a new contact to be created, you will need to have the name, email, phone fields included in the form.

**IMPORTANT:** In order to create a contact for each form submission, Country ID field needs to be defined.

2. Other fields should also be defined. Phone numbers will not be created unless a contact is created. Specify the contact category, contact type and mailing lists. These information can be defined from the Contact Admin.
3. When 'Use User Contact' is selected, the logged in user will be the contact of the submitted form. Contact fields will be pre-filled with the user's information and these fields will be readonly. If no user is logged in, the form will create a contact.

The screenshot shows a web interface with several tabs: Details, Form, Javascript, Introduction, Response, Status, Controls, Files, Notifications, Contacts, and Su. Under the 'Contacts' tab, there are three sections: 'Category' with a dropdown menu set to 'Active', 'Contact Type' with a dropdown menu set to 'Subscriber', and 'Mailing Lists' with a 'Filter Choices' input field and a dropdown menu set to 'Weekly Subscriptions'.

Contact category, contact type and mailing list

The screenshot shows a configuration screen with a checkbox labeled 'Use User Contact'. Below it, there are two tables. The first table, 'Contact Fields', has columns for 'Contact Fields', 'Form Field', and a delete icon. The second table, 'Phone Fields', has columns for 'Phone Number Field', 'Phone Type', and a delete icon.

Contact Fields	Form Field	
First	First Name (first_name)	✖
Last	Last Name (last_name)	✖
Company	Company (company)	✖
Email	Email Address (email)	✖
Country	Country (country)	✖
		+

Phone Number Field	Phone Type	
Phone Number (phone_number)	Mobile	✖
		+

Match form fields with the Contact fields



- 4. On the page that will display the form, define the Country ID field in the **Controls tab**. Specify "country\_id" as the **Column Name**.
- 5. Create the control, "data\_type" and set the value to "hidden" and the control, "data\_value" and set it to "1000".

Column Name	Control Name	Control Value	
country_id	data_type	hidden	✖
country_id	data_value	1000	✖
			+

Match form fields with the Contact fields

- 6. After any form submission, the contact information will be created with the presets e.g. added to a contact category or to a mailing list.

Sarah Moore, ABC Company

Summary Contact Details Addresses Custom Member Touchpoints

**Mailing Lists**

- Weekly Subscriptions

**Categories**

**General Categories**

- Active

Contact information