



**PRODUCT MANUAL: SUBMISSION FORMS MODULE**

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## Submission Forms Module

After you've set up a dynamic module page that uses the Submission Forms module, please refer to the instructions below for learning how to manage Submission Forms. For more information about the dynamic pages go to *Website Pages and Files* manual.

### Creating a Submission Form

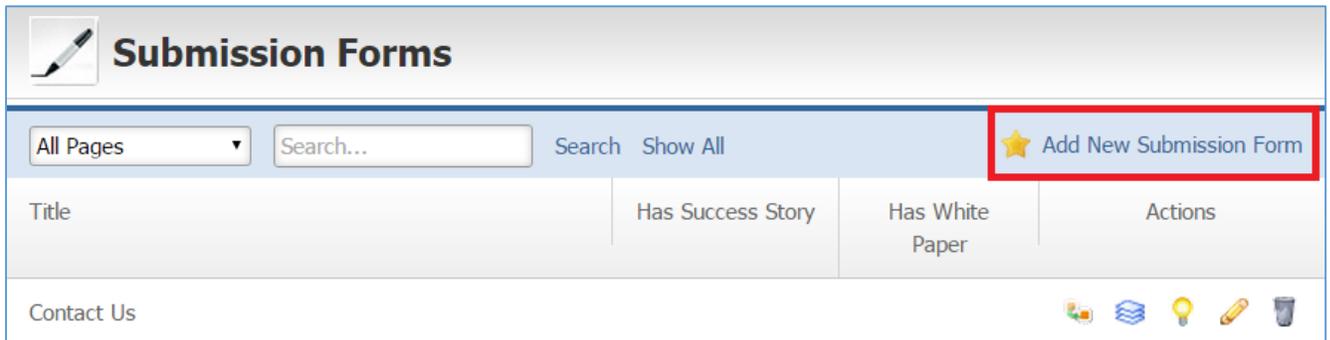
1. From the main page of the Administrative website, select **Submission Forms module**, located under the **Manage Content Modules** box.



The screenshot shows a list of content modules. The 'Submission Forms' module is highlighted with a red rectangular box. The list includes:

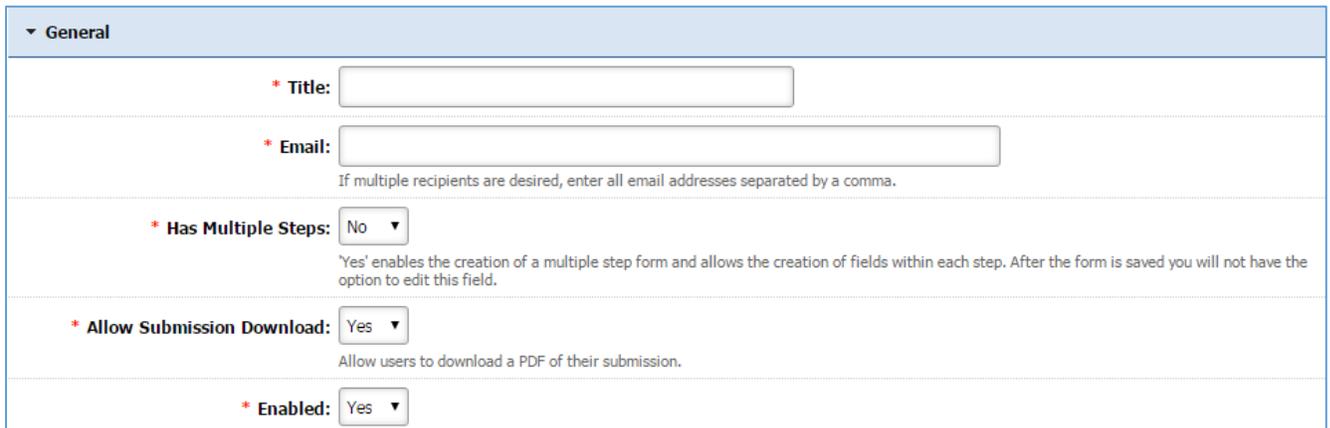
- Staff Directory • Categories**: Manage the staff directory for your organization.
- Submission Forms**: Manage the submission forms for your organization.
- Success Stories**: Manage success stories for your organization.
- Testimonials**: Manage testimonials for your organization.

2. Select **Add New Submission Form** located next to the yellow star on the upper right of the page.



The screenshot shows the 'Submission Forms' management interface. At the top, there is a search bar and a button labeled 'Add New Submission Form' with a yellow star icon, which is highlighted with a red box. Below the search bar, there are columns for 'Title', 'Has Success Story', 'Has White Paper', and 'Actions'. At the bottom, there is a 'Contact Us' link and several utility icons.

3. Fill out the general fields for your new submission form.



The screenshot shows the 'General' section of the form with the following fields:

- \* Title:** [Text input field]
- \* Email:** [Text input field]  
If multiple recipients are desired, enter all email addresses separated by a comma.
- \* Has Multiple Steps:** [No] (dropdown menu)  
'Yes' enables the creation of a multiple step form and allows the creation of fields within each step. After the form is saved you will not have the option to edit this field.
- \* Allow Submission Download:** [Yes] (dropdown menu)  
Allow users to download a PDF of their submission.
- \* Enabled:** [Yes] (dropdown menu)

**Title:** Enter the Title of your Submission Form

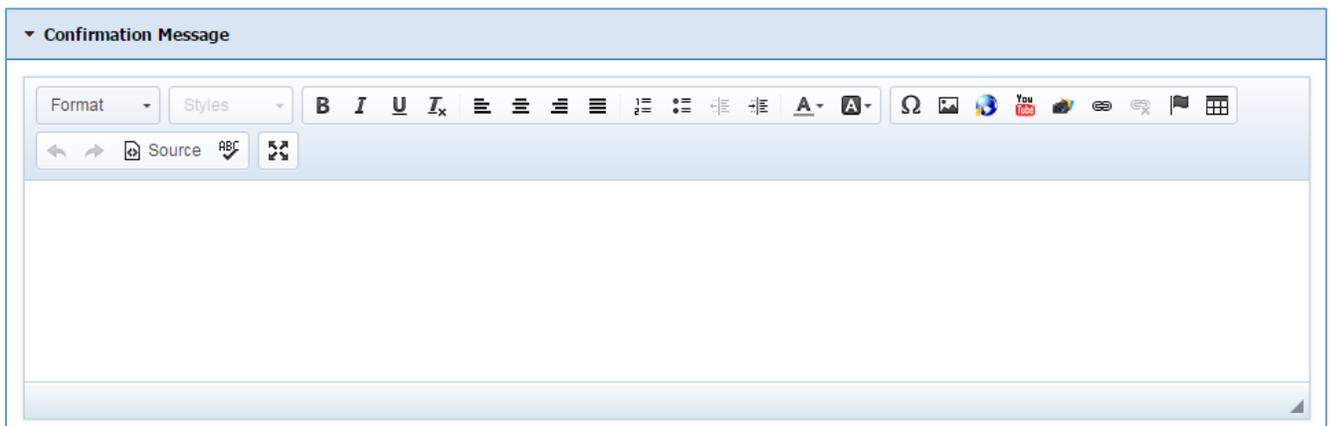
**Email:** Enter the email that will receive notifications each time a user submits this submission form. You can add multiple recipients by separating the email addresses by a comma.

**Has Multiple Steps:** Indicate whether or not your submission form will have multiple steps. Please note that this cannot be changed after you save the submission form.

**Allow Submission Download:** Select 'Yes' if you want the users to be able to download a PDF of their submission. Otherwise, select 'No'.

**Enabled:** Select 'Yes' if you wish your submission form to be enabled, otherwise select 'No'.

4. Enter a confirmation message. This is the message that users will receive upon submitting their information. This can be as simple as "Thank you for your message!".

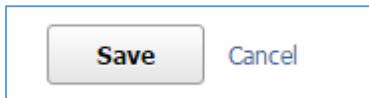


The screenshot shows a web editor titled "Confirmation Message". It features a rich text editor toolbar with options for bold, italic, underline, strikethrough, bulleted list, numbered list, indent, and outdent. There are also icons for text color, background color, link, unlink, image, video, and table. Below the toolbar is a large text area for entering the confirmation message.

5. Select the pages where your submission form will be available. The list of the pages that are available here are the dynamic pages you created that they use Submission Forms module. For more information about the dynamic pages go to **Website Pages and Files** manual.

▼ Pages			
Website	Page	Display	Approved
Demo	Contact	<input type="checkbox"/>	<input type="checkbox"/>
Demo	About Us » Special Requests	<input type="checkbox"/>	<input type="checkbox"/>

6. Click Save at the bottom of the page.



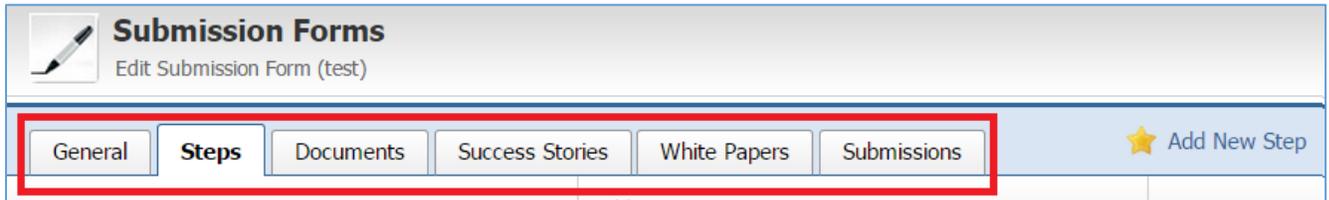
The screenshot shows two buttons: "Save" and "Cancel". The "Save" button is highlighted with a blue border.

7. Once you save your submission form, more tabs will be available on the form depending on your selection (Yes or No) under the **Has Multiple Steps** dropdown.

**Has Multiple Steps: Yes**

This section is applicable when a submission form has multiple steps.

If you selected 'Yes' under **Has Multiple Steps** drop down you will have the following tabs available: General, Steps, Documents, Success Stories, White Papers, and Submissions.

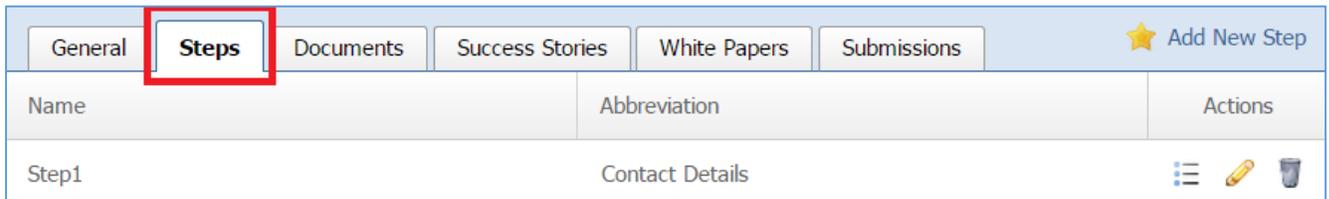


Managing Steps

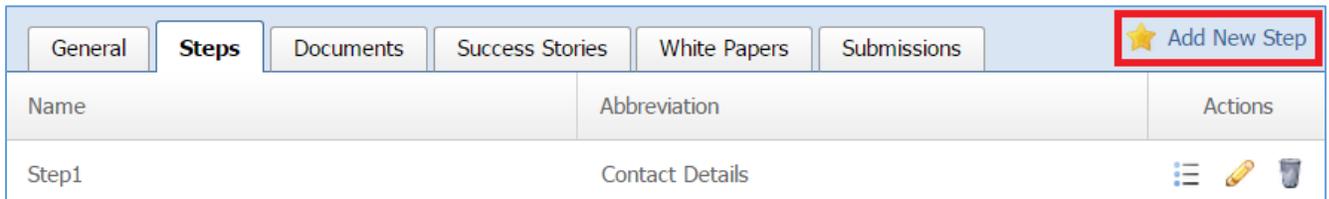
The **Steps** tab is available only if a submission form has multiple steps.

Adding a New Step

1. Select the **Steps** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).



2. Select **Add New step** located next to the yellow star on the upper right of the **Steps** tab.



3. Fill out the fields for the new step.

A form for adding a new step. It has two input fields: '\* Name:' and 'Abbreviation:'. Below the 'Abbreviation' field is a note: 'Used on the public website as an alternative to the name value when the step is not active.' At the bottom of the form are two buttons: 'Save' and 'Cancel'.

4. Click Save at the bottom of the page.

### Editing a Step

1. Select the **Steps** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>		
Name	Abbreviation	Actions
Step1	Contact Details	  

2. Select the **Pencil** icon located to the right of the step you wish to edit.

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>		
Name	Abbreviation	Actions
Step1	Contact Details	  

3. Make the desired changes.
4. Once you have made the desired changes, click **Save** at the bottom of the page.

### Removing a Step

1. Select the **Steps** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>		
Name	Abbreviation	Actions
Step1	Contact Details	  

2. Select the **Trash** icon located to the right of the step you wish to remove.

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>		
Name	Abbreviation	Actions
Step1	Contact Details	  

3. You will be asked to confirm that you wish to remove the step. Click **OK**.

### Managing Fields

For a multi-steps submission form, you have to manage the fields of each step separately.

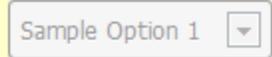
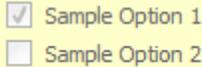
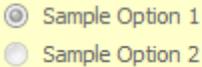
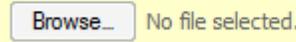
#### Adding a New Field

1. Select the **List** icon located to the right of your step to manage the fields of this step.

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>		
Name	Abbreviation	Actions
Step1	Contact Details	  

2. Under the **Type** option, you have three options: 'Standard Fields', 'Advanced Fields' and 'Separators'. Standard and Advanced fields are to be used when asking for input/answers to questions from your users. Separator fields allow you to enter a break in your submission form. Select one of the standard fields, advanced fields or separators. Below you can find the description of the different types and then instructions on how to fill out each type's fields.

## Standard Fields

Field Type	Type Description
Single-line Text	<p>Allows a user to enter text into a single-line input field.</p>  A single-line text input field with the placeholder text "Text goes here."
Multiple-line Text	<p>Allows a user to enter text into a textarea field.</p>  A multiple-line text input field (textarea) with two lines of placeholder text: "Line 1 of text goes here." and "Line 2 of text goes here."
Paragraph Text	<p>Use this option if you'd like to use a field to describe in more detail what field answers should contain. I.e. Use before a section or break to describe question sets. This field does not allow any user input.</p>
Drop-down Custom	<p>Allows a user to select one option from a list of choices.</p>  A drop-down menu with the text "Sample Option 1" and a downward-pointing arrow.
Check Boxes	<p>Allows a user to select zero or more options of a limited number of choices.</p>  Two check boxes. The first is checked and labeled "Sample Option 1". The second is unchecked and labeled "Sample Option 2".
Radio Buttons	<p>Allows a user to select only one option of a limited number of choices.</p>  Two radio buttons. The first is selected (indicated by a filled circle) and labeled "Sample Option 1". The second is unselected (indicated by an empty circle) and labeled "Sample Option 2".
File Upload	<p>Allows a user to upload a file.</p>  A file upload field with a "Browse..." button and the text "No file selected."

## Advanced Fields

Field Type	Type Description
Date	<p>Allows the user to select or type a date.</p> <p><b>Field Name:</b> <input type="text" value="09/18/2015"/>  mm/dd/yyyy</p>
Drop Down: Country	<p>Allows a user to select one country from a list of countries.</p> <p><b>Field Name:</b> <input type="text" value="United States"/> ▼</p>
Drop Down: State	<p>Allows a user to select one state from a list of states.</p> <p><b>Field Name:</b> <input type="text" value="Iowa"/> ▼</p>
Signature	<p>Requires the user to type the name or draw the signature before submitting the form.</p> <p><b>Field Name:</b> <input type="text" value="Sample Name"/> Print your name</p> <p> Draw your signature</p> <p><a href="#">Clear</a></p>

## Separators

Separator	Type Description
Break	<p>Inserts a separator between two fields.</p> <p>.....</p>
Section	<p>Inserts a section between two fields.</p> <p><b>Sample Section</b></p>

Type: Single-line Text

This option allows the user to enter text into a single-line input field.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▼

Single-line Text

Allows a user to enter text into a single-line input field.

Field Name:

Multiple-line Text

Paragraph Text

Drop-down: Custom

Check Boxes

Radio Buttons

File Upload

**Advanced Fields** ▶

**Separators** ▶

---

**\* Name:**

---

Placeholder:

---

Hint:

---

**\* Encrypt Data:** No ▼

---

**\* Size:** Small ▼

---

Max Length:

---

Validate As:

---

▼ **Settings**

**\* Required:** No ▼

---

**\* Used for Submission Identifier:** No ▼

Set this to 'Yes' if the field can be used to identify the person submitting the form. For example 'First Name' and 'Last Name' are good identifying fields, whereas 'Comments' and 'Phone Number' are not.

---

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Placeholder:** Enter a short text that describes the expected value of the input field (e.g. a sample value or a short description of the expected format). The short hint is displayed in the input field before the user enters a value.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Size:** Specify how big you wish your field to be.

**Max Length:** Specify a maximum length for the user input. In case that the user enter a value with a bigger length that the max length, the submission of the form will fail and the user will be asked to decrease the length of the field to up to maximum.

**Validate At:** Specify if there is any specific validation for the field (e.g. if the field is a valid email address). In case that the input of the user fails does not pass the validation, the submission of the form will fail and the user will be asked to change the value to a valid one.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

**Used for Submission Identifier:** Set this to 'Yes' if the field can be used to identify the person submitting the form. For Example 'First Name' and 'Last Name' are good identifying fields, whereas 'Comments' and 'Phone Numbers' are not.

2. Click **Save** at the bottom of the page.

Type: Multi-line Text

This type allows a user to enter text into a multiple-line text field.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▼

Single-line Text

Multiple-line Text

Allows a user to enter text into a multiple-line text field.

**Field Name:**

Paragraph Text

Drop-down: Custom

Check Boxes

Radio Buttons

File Upload

**Advanced Fields** ▶

**Separators** ▶

---

**\* Name:**

---

Placeholder:

---

Hint:

---

**\* Encrypt Data:**

---

**\* Size:**

---

Max Length:

▼ **Settings**

**\* Required:**

---

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Placeholder:** Enter a short text that describes the expected value of the input field (e.g. a sample value or a short description of the expected format). The short hint is displayed in the input field before the user enters a value.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Size:** Specify how big you wish your field to be.

**Max Length:** Specify a maximum length for the user input. In case that the user enter a value with a bigger length than the max length, the submission of the form will fail and the user will be asked to decrease the length of the field to up to maximum.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.

Type: Paragraph Text

This type inserts one or more paragraphs of text within the form. It does not allow any user input but it is used to make any text (e.g. instructions, information) available to the user within the form.

1. Fill out the fields with the desired values.

The screenshot shows a configuration window for a form field. The 'General' tab is active, showing the following options:

- Type: Standard Fields**
  - Single-line Text
  - Multiple-line Text
  - Paragraph Text
- Advanced Fields**
  - Drop-down: Custom
  - Check Boxes
  - Radio Buttons
  - File Upload
- Separators**

Below these options, there are three main configuration fields:

- Name:** A text input field.
- Scrolling Display:** A dropdown menu set to 'No'. A note below it says: "Setting this to Yes will apply a scroll bar to the designated area."
- Display With Confirmation & Notifications:** A dropdown menu set to 'Yes'. A note below it says: "Set this to No when the field is only intended to provide instructions to the user and not to be included on the confirmation page and emails."

The 'Text' tab is also visible, showing a rich text editor toolbar with options like Bold, Italic, Underline, and a large text area. At the bottom, there are 'Save' and 'Cancel' buttons.

**Name:** Enter the Name of your field. The name will not be available to the user.

**Scrolling Display:** Select 'Yes' if you wish to apply a scroll bar to the designated area (e.g. when the text is very long). Otherwise select 'No'.

**Display with Confirmation & Notifications:** Select 'Yes' if you wish the field to be included on the confirmation page and emails. Otherwise select 'No' (e.g. if the field is only intended to provide instructions to the user).

**Text:** Enter the text that you wish to be displayed using the text editor.

2. Click **Save** at the bottom of the page.

Type: Drop Down: Custom

This type of field allows a user to select one option from a list of choices.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▼

Single-line Text

Multiple-line Text

Paragraph Text

Drop-down: Custom

Allows a user to select one option from a list of choices.

**Field Name:** Sample Option 1 ▼

Check Boxes

Radio Buttons

File Upload

**Advanced Fields** ▶

**Separators** ▶

---

**\* Name:**

---

Placeholder:

---

Hint:

---

**\* Encrypt Data:** No ▼

▼ **Settings**

**\* Required:** No ▼

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Placeholder:** Enter a short text that describes the expected value of the input field (e.g. a sample value or a short description of the expected format). The short hint is displayed in the input field before the user enters a value.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.
3. Add the **Field Options**

*Adding a New Field Option*

1. Select **Add New Field Option** located next to the yellow star on the upper right of the page.



2. Fill out the fields from your field option.

**General**

\* **Name:**

\* **Value:**

\* **Enabled:** Yes ▾

**Save** **Cancel**

**Name:** This is what it will be displayed to the user as an option.

**Value:** The value is that it will be stored to the database if the option will be selected by the user.

**Enabled:** Select 'Yes' to enable this option in order to be available to the user. Otherwise select 'No'.

3. Click **Save** at the bottom of the page.

*Adding a New Conditional Field*

A conditional field is a field that is displayed to a user only if the user selected a specific field option from the list of field options. You have to add any field options only when this is your case.

1. Select the **List Options with the Plus sign** icon located next to the field option to which you want to add conditional fields.



2. Fill out the fields for your conditional field. For detailed instructions about how to fill out a conditional field you can refer to the **Adding a New Field** section.

▼ **General**

 This field will be displayed if the 'By Email' option is selected.

**\* Type:** **Standard Fields** ▶  
**Advanced Fields** ▶  
**Separators** ▶

---

**\* Name:**

3. Click **Save** at the bottom of the page.

Type: Check Boxes

This type of field allows a user to select zero or more options of a limited number of choices.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▼

- Single-line Text
- Multiple-line Text
- Paragraph Text
- Drop-down: Custom
- Check Boxes

Allows a user to select zero or more options of a limited number of choices.

Field Name:  Sample Option 1  
 Sample Option 2

- Radio Buttons
- File Upload

**Advanced Fields** ▶

**Separators** ▶

---

**\* Name:**

---

Hint:

---

**\* Encrypt Data:**

---

**\* Display Options in Columns:**

---

**\* Hide Label:**

Set this to Yes in order to hide the label. Hiding the label will also hide the required check mark.

▼ **Settings**

**\* Required:**

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Display Options in Columns:** Select in how many columns you wish the options to be displayed.

**Hide Label:** Select 'Yes' if you wish to hide from the user the label (the name of the field), otherwise select 'No'. It should be note that hiding the label will also hide the required check mark.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.
3. Add the **Field Options**

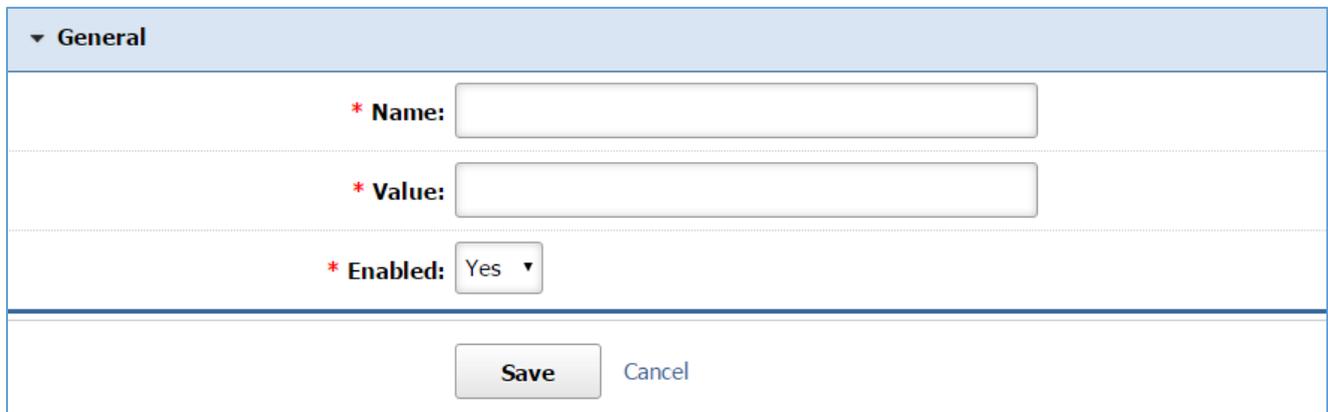
#### Adding a New Field Option

1. Select **Add New Field Option** located next to the yellow star on the upper right of the page.



Name	Has Conditional Fields	Actions
By Email		

2. Fill out the fields from your field option.



**General**

\* Name:

\* Value:

\* Enabled: Yes ▾

**Name:** This is what it will be displayed to the user as an option.

**Value:** The value is that it will be stored to the database if the option will be selected by the user.

**Enabled:** Select 'Yes' to enable this option in order to be available to the user. Otherwise select 'No'.

3. Click Save at the bottom of the page.

#### Adding a New Conditional Field

A conditional field is a field that is displayed to a user only if the user selected a specific field option from the list of field options. You have to add any field options only when this is your case.

1. Select the **List Options with the Plus sign** icon located next to the field option to which you want to add conditional fields.

General		Field Options	★ Add New Field Option
Name	Has Conditional Fields	Actions	
By Email			  

2. Fill out the fields for your conditional field. For detailed instructions about how to fill out a conditional field you can refer to the **Adding a New Field** section.

▼ General

 This field will be displayed if the 'By Email' option is selected.

**\* Type:** Standard Fields ▶

Advanced Fields ▶

Separators ▶

---

**\* Name:**

3. Click **Save** at the bottom of the page.

Type: Radio Buttons

This type allows a user to select only one option of a limited number of choices.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▼

- Single-line Text
- Multiple-line Text
- Paragraph Text
- Drop-down: Custom
- Check Boxes
- Radio Buttons

Allows a user to select only one option of a limited number of choices.

**Field Name:**  Sample Option 1  
 Sample Option 2

File Upload

**Advanced Fields** ▶

**Separators** ▶

---

**\* Name:**

---

**Hint:**

---

**\* Encrypt Data:** No ▼

---

**\* Display Options in Columns:** Select... ▼

▼ **Settings**

**\* Required:** No ▼

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Display Options in Columns:** Select in how many columns you wish the options to be displayed.

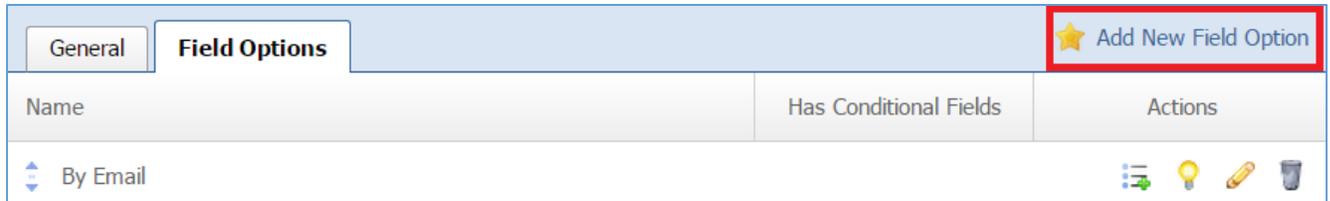
**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.

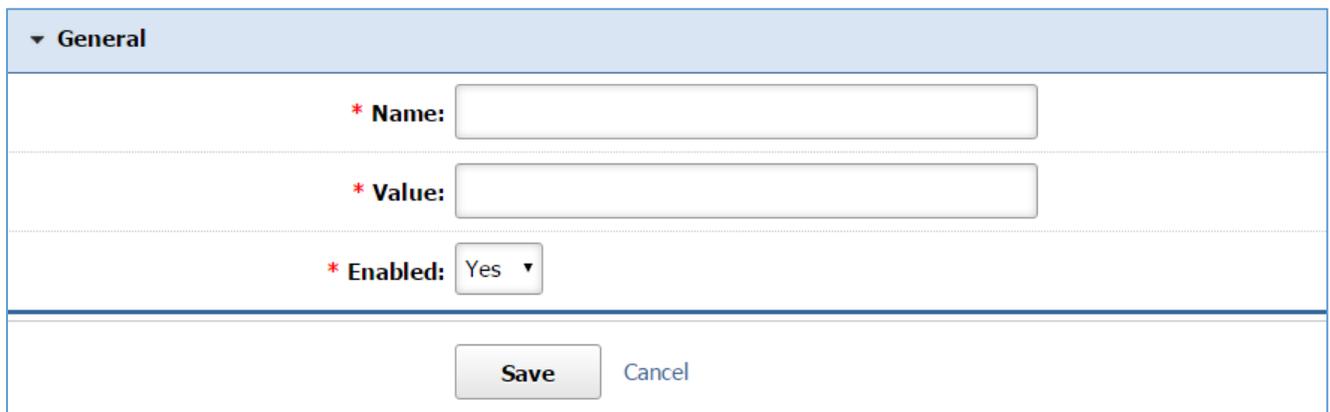
### 3. Add the **Field Options**

#### Adding a New Field Option

1. Select **Add New Field Option** located next to the yellow star on the upper right of the page.



2. Fill out the fields from your field option.



**Name:** This is what it will be displayed to the user as an option.

**Value:** The value is that it will be stored to the database if the option will be selected by the user.

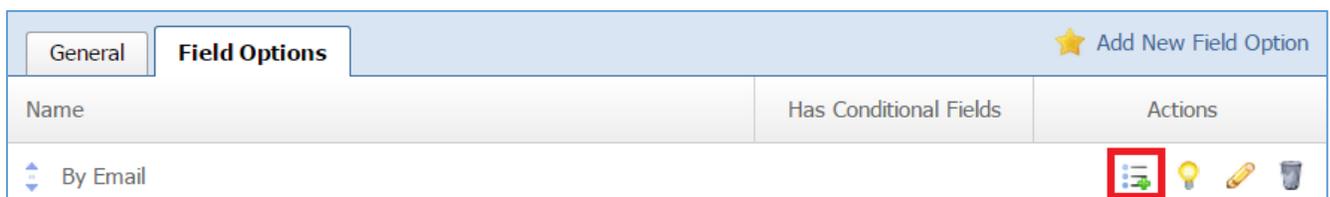
**Enabled:** Select 'Yes' to enable this option in order to be available to the user. Otherwise select 'No'.

3. Click Save at the bottom of the page.

#### Adding New Conditional Field

A conditional field is a field that is displayed to a user only if the user selected a specific field option from the list of field options. You have to add any field options only when this is your case.

4. Select the **List Options with the Plus sign** icon located next to the field option to which you want to add conditional fields.



5. Fill out the fields for your conditional field. For detailed instructions about how to fill out a conditional field you can refer to the **Adding a New Field** section.

▼ **General**

 This field will be displayed if the 'By Email' option is selected.

\* **Type:** **Standard Fields** ▶  
**Advanced Fields** ▶  
**Separators** ▶

---

\* **Name:**

6. Click **Save** at the bottom of the page.

Type: File Upload

This type allows a user to upload a file.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▼

- Single-line Text
- Multiple-line Text
- Paragraph Text
- Drop-down: Custom
- Check Boxes
- 
- File Upload

Allows a user to upload a file.

**Field Name:**  No file chosen

**Advanced Fields** ▶

**Separators** ▶

---

**\* Name:**

---

**Hint:**

---

**\* Encrypt Data:**  ▼

---

**\* Accepted Formats:**

- Images
- Text Files
- Word Documents
- Excel Documents
- PowerPoint Documents
- PDFs
- Zip Archives
- Graphic Files

▼ **Settings**

**\* Required:**  ▼

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Accepted Formats:** Select all the accepted image format that a user is able to upload. In case that the user select an image that does not have the accepted format, the submission of the form will fail and the user will be asked to choose a different image.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.

Type: Date

This type allows the user to pick a date from the calendar or to type a date.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▶

**Advanced Fields** ▼

Date

Allows the user to select or type a date.

Field Name:

Drop-down: Country

Drop-down: State

Signature

**Separators** ▶

---

**\* Name:**

---

**\* Expected Format:**

---

Placeholder:

---

Hint:

---

Minimum Selectable Date:

A number of days from today. For example 2 represents two days from today and -1 represents yesterday.

---

Maximum Selectable Date:

A number of days from today. For example 2 represents two days from today and -1 represents yesterday.

---

**\* Encrypt Data:**

---

**\* Size:**

---

**\* Date Selection:**

Allow or disallow the users to type a date.

---

▼ **Settings**

**\* Required:**

---

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Expected Format:** Select the expected date format (e.g. mm/dd/yyyy).

**Placeholder:** Enter a short text that describes the expected value of the input field (e.g. a sample value or a short description of the expected format). The short hint is displayed in the input field before the user enters a value.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Minimum Selectable Date:** Specify the minimum number of days from today. If the user enters a date prior to the minimum selectable date, the submission of the form will fail and the user will be asked to choose a different date. If you do not wish to have such a constraint, leave this field empty.

**Maximum Selectable Date:** Specify the maximum number of days from today. If the user enters a date later than the maximum selectable date, the submission of the form will fail and the user will be asked to choose a different date. If you do not wish to have such a constraints, leave this field empty.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Size:** Specify how big you wish your field to be.

**Date Selection:** Select 'Select only' if you want to prevent the user for typing the date. Otherwise select 'Select or Type' in order to allow the user either to select the date from the calendar or to type it.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.

Type: Drop Down: Country

This type allows a user to select one country from a list of countries.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▶

**Advanced Fields** ▼

Date

Drop-down: Country

Allows a user to select one country from a list of countries.

**Field Name:** United States ▼

Drop-down: State

Signature

**Separators** ▶

---

**\* Name:**

---

Placeholder:

---

Hint:

---

**\* Encrypt Data:** No ▼

---

▼ **Settings**

**\* Required:** No ▼

---

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Placeholder:** Enter a short text that describes the expected value of the input field (e.g. a sample value or a short description of the expected format). The short hint is displayed in the input field before the user enters a value.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.

Type: State

This type allows a user to select one state from a list of states.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▶

**Advanced Fields** ▼

Date

Drop-down: Country

Drop-down: State

Allows a user to select one state from a list of states.

**Field Name:** Iowa ▼

Signature

**Separators** ▶

---

**\* Name:**

---

Placeholder:

---

Hint:

---

**\* Encrypt Data:** No ▼

▼ **Settings**

**\* Required:** No ▼

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Placeholder:** Enter a short text that describes the expected value of the input field (e.g. a sample value or a short description of the expected format). The short hint is displayed in the input field before the user enters a value.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.

Type: Signature

This type requires the user to type the name or draw the signature before submitting the form.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▶

**Advanced Fields** ▼

- Date
- Drop-down: Country
- Drop-down: State
- Signature

Requires the user to type the name or draw the signature before submitting the form.

Field Name:  Print your name

Draw your signature

[Clear](#)

**Separators** ▶

**\* Name:**

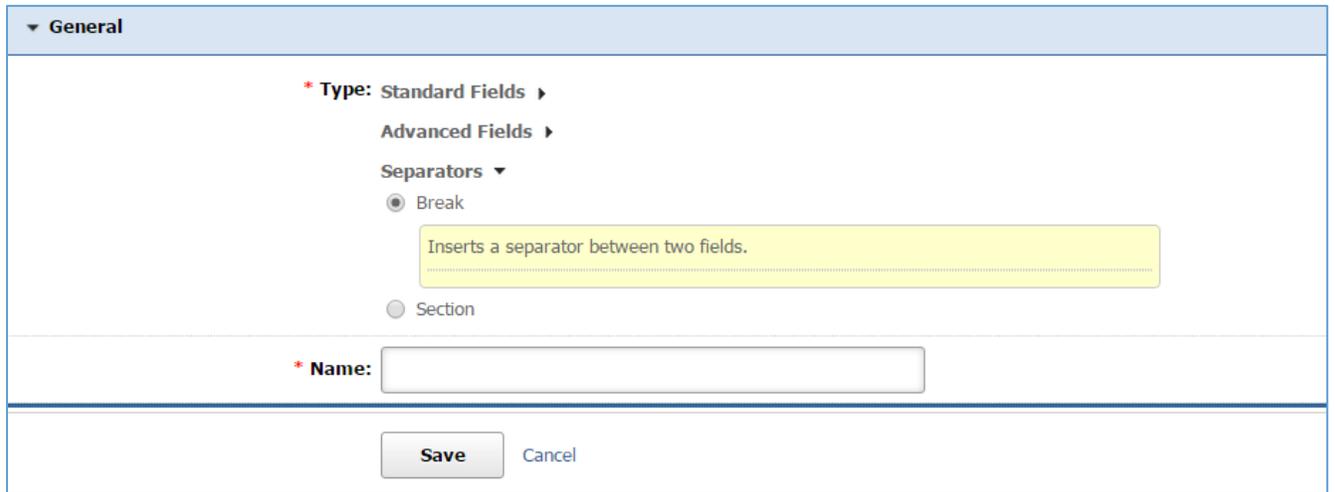
**Name:** Enter the Name of your field which will be available as the label text of the input field.

2. Click **Save** at the bottom of the page.

Type: Break Separator

This type inserts a separator between two fields.

1. Fill out the fields with the desired values.



The screenshot shows a configuration dialog with a blue header bar labeled "General". Below the header, there are several sections: "\* Type: Standard Fields" with a right-pointing arrow, "Advanced Fields" with a right-pointing arrow, and "Separators" with a downward-pointing arrow. Under "Separators", there are two radio button options: "Break" (which is selected) and "Section". Below the "Break" option is a yellow highlighted text box containing the text "Inserts a separator between two fields.". Below the "Section" option is an empty text input field. At the bottom of the dialog, there are two buttons: "Save" and "Cancel".

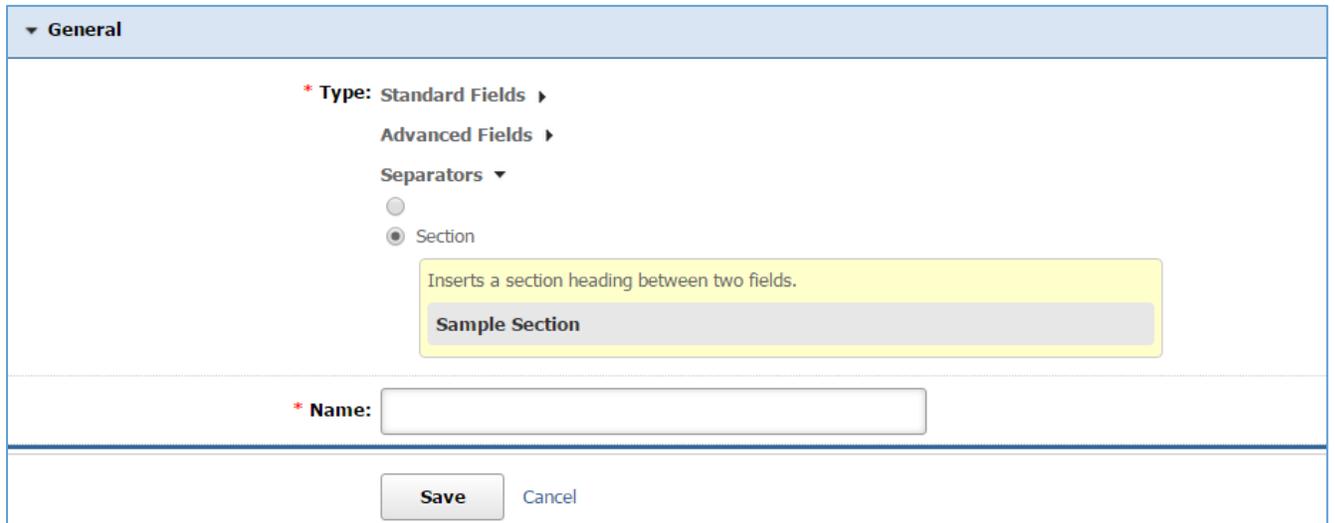
**Name:** Enter the Name of your field which will be available as the label text of the input field.

2. Click **Save** at the bottom of the page.

Type: Section Separator

This type inserts a section heading between two fields.

1. Fill out the fields with the desired values.



The screenshot shows a configuration window with a blue header bar labeled "General". Inside the window, there are several sections: "\* Type: Standard Fields" with a right-pointing arrow, "Advanced Fields" with a right-pointing arrow, and "Separators" with a downward-pointing arrow. Under "Separators", there are two radio buttons: the first is unselected, and the second is selected and labeled "Section". Below the radio buttons is a yellow-bordered box containing the text "Inserts a section heading between two fields." and a grey sample box containing the text "Sample Section". At the bottom of the configuration area, there is a label "\* Name:" followed by an empty text input field. At the very bottom of the window, there are two buttons: "Save" and "Cancel".

**Name:** Enter the Name of your field which will be available as the label text of the input field.

2. Click **Save** at the bottom of the page.

### Editing a Field

1. Select the **Steps** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).
2. Select the **List** icon located to the right of your step to manage the fields of this step.

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>				
Name	Abbreviation			Actions
Step1	Contact Details			  

3. Select the **Pencil** icon located to the right of the field.

General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
Color	Drop-down: Custom			 

4. Make the desired changes to the field.
5. Click **Save** at the bottom of the page.

### Removing a Field

1. Select the **Steps** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).
2. Select the **List** icon located to the right of your step to manage the fields of this step.

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>				
Name	Abbreviation			Actions
Step1	Contact Details			  

3. Select the **Trash** icon located to the right of the field.

General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
Color	Drop-down: Custom			 

4. You will be asked to confirm that you wish to remove the field option. Click 'OK'.

## Managing Field Options

Field Options apply only to **Drop Down: Custom** and to **Radio Button** types if fields.

Adding a New Field Option

1. Select the **Steps** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>		
Name	Abbreviation	Actions
Step1	Contact Details	  

2. Select the **List** icon located to the right of your step to manage the fields of this step.

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>		
Name	Abbreviation	Actions
Step1	Contact Details	  

3. Select the **Fields** tab located into the step.

General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
 Color	Drop-down: Custom			 

4. Select the **Pencil** icon located to the right of the field you wish to manage its field options.

General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
 Color	Drop-down: Custom			 

5. Select the **Field Options** tab located into the field.

General <b>Field Options</b> <span>★ Add New Field Option</span>		
Name	Has Conditional Fields	Actions
 Red		   

6. Select **Add New Field Option** located next to the yellow star on the upper right of the page.

7. Fill out the fields from your field option.

**Name:** This is what it will be displayed to the user as an option.

**Value:** The value is that it will be stored to the database if the option will be selected by the user.

**Enabled:** Select 'Yes' to enable this option in order to be available to the user. Otherwise select 'No'.

8. Click Save at the bottom of the page.

Editing a Field Option

9. Select the **Steps** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).

10. Select the **List** icon located to the right of your step to manage the fields of this step.

11. Select the **Fields** tab located into the step.

General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
Color	Drop-down: Custom			 

12. Select the **Pencil** icon located to the right of the field you wish to manage its field options.

General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
Color	Drop-down: Custom			 

13. Select the **Field Options** tab located into the field.

General <b>Field Options</b> <span>★ Add New Field Option</span>		
Name	Has Conditional Fields	Actions
Red		   

14. Select the **Pencil** icon located to the right of the field option you wish to edit.

General <b>Field Options</b> <span>★ Add New Field Option</span>		
Name	Has Conditional Fields	Actions
Red		   

15. Make the desired changes to the field option.

16. Click **Save** at the bottom of the page.

Enabling / Disabling a Field Option

17. Select the **Steps** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>				
Name	Abbreviation	Actions		
Step1	Contact Details	  		

18. Select the **List** icon located to the right of your step to manage the fields of this step.

General		Steps	Documents	Success Stories	White Papers	Submissions	★ Add New Step
Name	Abbreviation		Actions				
Step1	Contact Details		  				

19. Select the **Fields** tab located into the step.

General		Fields	★ Add New Field			
Field	Type	Encrypted	Required	Actions		
Color	Drop-down: Custom			 		

20. Select the **Pencil** icon located to the right of the field you wish to manage its field options.

General		Fields	★ Add New Field			
Field	Type	Encrypted	Required	Actions		
Color	Drop-down: Custom			 		

21. Select the **Field Options** tab located into the field.

General		Field Options	★ Add New Field Option		
Name	Has Conditional Fields		Actions		
Red			   		

22. Select the **Lamp** icon located next to the field option you wish to enable or disable.

General		Field Options	★ Add New Field Option		
Name	Has Conditional Fields		Actions		
Red			   		

Removing a Field Option

23. Select the **Steps** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>				
Name	Abbreviation	Actions		
Step1	Contact Details			

24. Select the **List** icon located to the right of your step to manage the fields of this step.

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>				
Name	Abbreviation	Actions		
Step1	Contact Details			

25. Select the **Fields** tab located into the step.

General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
 Color	Drop-down: Custom			 

26. Select the **Pencil** icon located to the right of the field you wish to manage its field options.

General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
 Color	Drop-down: Custom			 

27. Select the **Field Options** tab located into the field.

General <b>Field Options</b> <span>★ Add New Field Option</span>		
Name	Has Conditional Fields	Actions
 Red		   

28. Select the **Trash** icon located to the right of the field option you wish to remove.



29. You will be asked to confirm that you wish to remove the field option. Click **OK**.

## Managing Conditional Fields

Conditional Fields apply only to **Drop Down: Custom** and to **Radio Button** types of fields and each conditional field is associated with a Field Option.

### Adding a New Conditional Field

1. Select the **Steps** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>				
Name	Abbreviation			Actions
Step1	Contact Details			  

2. Select the **List** icon located to the right of your step to manage the fields of this step.

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>				
Name	Abbreviation			Actions
Step1	Contact Details			  

3. Select the **Fields** tab located into the step.

General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
 Color	Drop-down: Custom			 

4. Select the **Pencil** icon located to the right of the field you wish to manage its field options.

General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
 Color	Drop-down: Custom			 

5. Select the **Field Options** tab located into the field.

General <b>Field Options</b> <span>★ Add New Field Option</span>		
Name	Has Conditional Fields	Actions
 Red		   

- When a field option has conditional fields, a **Tick** icon is displayed at the right of the field option, under the **Has Conditional Fields** column, and a list icon is available.
- Select the **List** icon located to the right of the field option.

General		Field Options	★ Add New Field Option		
Name	Has Conditional Fields	Actions			
By Email	<input checked="" type="checkbox"/>				

- All the conditional fields of the selected field option are available under the **Conditional Fields** tab.

General		Conditional Fields	★ Add New Conditional Field		
Field	Type	Encrypted	Required	Actions	
Email Address	Single-line Text		<input checked="" type="checkbox"/>		

- Select **Add New Conditional Field** located next to the yellow star on the upper right of the page.

General		Conditional Fields	★ Add New Conditional Field		
Field	Type	Encrypted	Required	Actions	
Email Address	Single-line Text		<input checked="" type="checkbox"/>		

- Fill out the fields for the conditional field. For detail instruction about the field types you can go to **Managing Fields** section.
- Click **Save** at the bottom of the page.

Editing a Conditional Field

1. Select the **Steps** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).

General		<b>Steps</b>	Documents	Success Stories	White Papers	Submissions	★ Add New Step
Name	Abbreviation					Actions	
Step1	Contact Details					  	

2. Select the **List** icon located to the right of your step to manage the fields of this step.

General		<b>Steps</b>	Documents	Success Stories	White Papers	Submissions	★ Add New Step
Name	Abbreviation					Actions	
Step1	Contact Details					  	

3. Select the **Fields** tab located into the step.

General		<b>Fields</b>					★ Add New Field
Field	Type	Encrypted	Required	Actions			
 Color	Drop-down: Custom			 			

4. Select the **Pencil** icon located to the right of the field you wish to manage its field options.

General		<b>Fields</b>					★ Add New Field
Field	Type	Encrypted	Required	Actions			
 Color	Drop-down: Custom			 			

5. Select the **Field Options** tab located into the field.

General		<b>Field Options</b>				★ Add New Field Option
Name	Has Conditional Fields			Actions		
 Red				   		

6. When a field option has conditional fields, a **Tick** icon is displayed at the right of the field option, under the **Has Conditional Fields** column, and a list icon is available.
7. Select the **List** icon located to the right of the field option.

General		Field Options	★ Add New Field Option	
Name	Has Conditional Fields	Actions		
By Email	<input checked="" type="checkbox"/>			

8. All the conditional fields of the selected field option are available under the **Conditional Fields** tab.

General		Conditional Fields	★ Add New Conditional Field		
Field	Type	Encrypted	Required	Actions	
Email Address	Single-line Text		<input checked="" type="checkbox"/>		

9. Select the **Pencil** icon located next to the conditional field you wish to edit.

General		Conditional Fields	★ Add New Conditional Field		
Field	Type	Encrypted	Required	Actions	
Email Address	Single-line Text		<input checked="" type="checkbox"/>		

10. Edit the conditional field.

11. Once you have made the desired changes, click **Save** at the bottom of the page.

Removing a Conditional Field

1. Select the **Steps** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).

General		<b>Steps</b>	Documents	Success Stories	White Papers	Submissions	★ Add New Step
Name	Abbreviation						Actions
Step1	Contact Details						☰ ✎ 🗑️

2. Select the **List** icon located to the right of your step to manage the fields of this step.

General		<b>Steps</b>	Documents	Success Stories	White Papers	Submissions	★ Add New Step
Name	Abbreviation						Actions
Step1	Contact Details						☰ ✎ 🗑️

3. Select the **Fields** tab located into the step.

General		<b>Fields</b>	★ Add New Field			
Field	Type	Encrypted	Required	Actions		
Color	Drop-down: Custom			✎	🗑️	

4. Select the **Pencil** icon located to the right of the field you wish to manage its field options.

General		<b>Fields</b>	★ Add New Field			
Field	Type	Encrypted	Required	Actions		
Color	Drop-down: Custom			✎	🗑️	

5. Select the **Field Options** tab located into the field.

General		<b>Field Options</b>	★ Add New Field Option		
Name	Has Conditional Fields	Actions			
Red		☰	💡	✎	🗑️

6. When a field option has conditional fields, a **Tick** icon is displayed at the right of the field option, under the **Has Conditional Fields** column, and a list icon is available.
7. Select the **List** icon located to the right of the field option.

General		Field Options	★ Add New Field Option	
Name	Has Conditional Fields	Actions		
By Email	<input checked="" type="checkbox"/>			

8. All the conditional fields of the selected field option are available under the **Conditional Fields** tab.

General		Conditional Fields	★ Add New Conditional Field		
Field	Type	Encrypted	Required	Actions	
Email Address	Single-line Text		<input checked="" type="checkbox"/>		

9. Select the **Trash** icon located to the right of the conditional field you wish to remove.

General		Conditional Fields	★ Add New Conditional Field		
Field	Type	Encrypted	Required	Actions	
Email Address	Single-line Text		<input checked="" type="checkbox"/>		

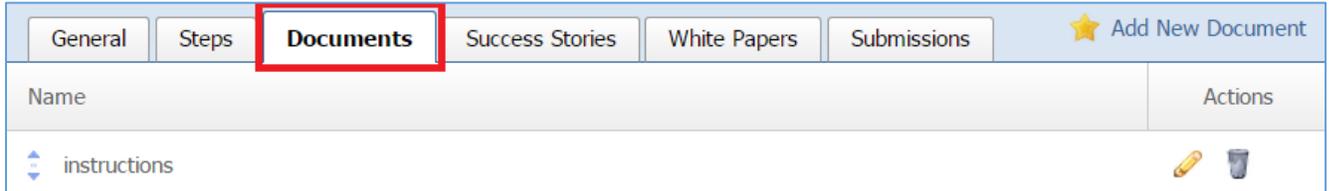
10. You will be asked to confirm that you wish to remove the conditional field. Click 'OK'.

## Managing Documents

This feature allows you to have documents in your submission forms.

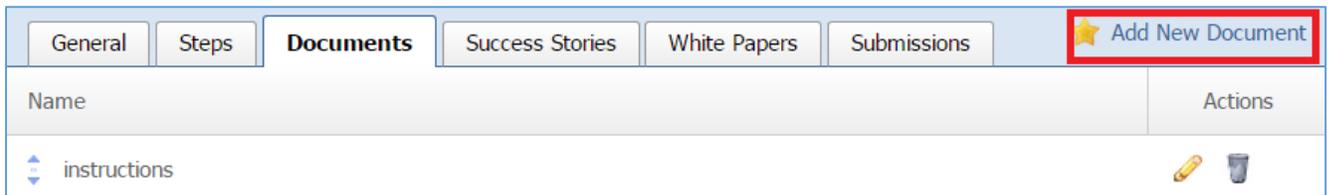
### Adding a New Document

1. Select the **Documents** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Documents tab).



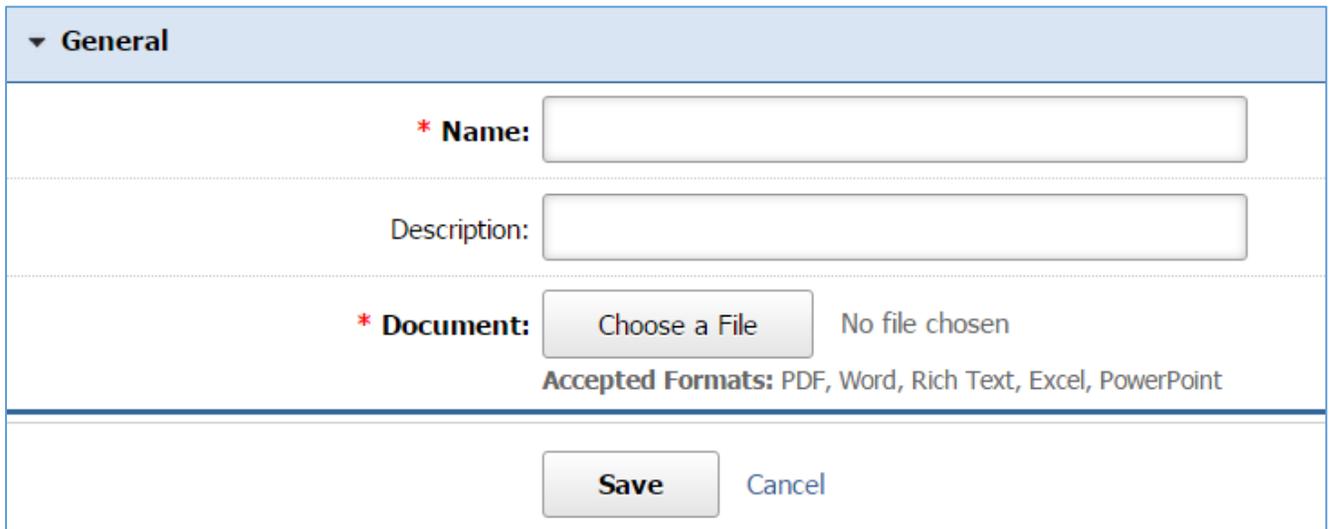
General	Steps	<b>Documents</b>	Success Stories	White Papers	Submissions	★ Add New Document
Name						Actions
instructions						 

2. Select the **Add New Document** located next to the yellow star on the upper right of your page.



General	Steps	Documents	Success Stories	White Papers	Submissions	★ Add New Document
Name						Actions
instructions						 

3. Fill out the fields for your new document.



**General**

\* **Name:**

Description:

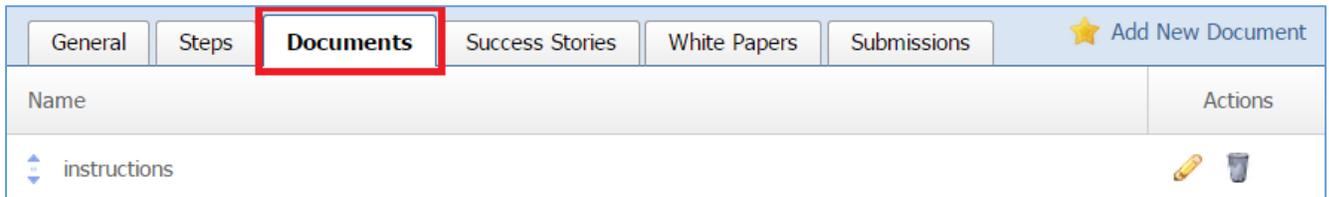
\* **Document:**  No file chosen

**Accepted Formats:** PDF, Word, Rich Text, Excel, PowerPoint

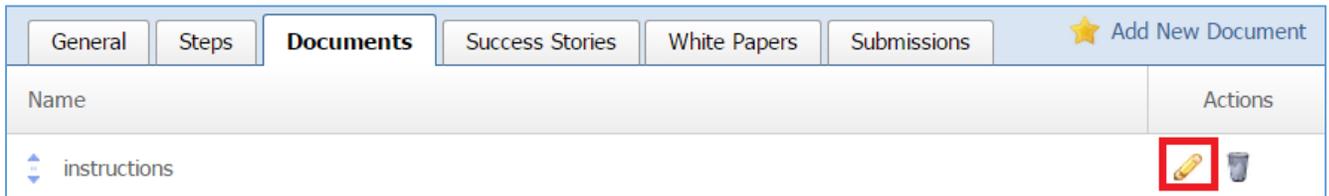
4. Click **Save** at the bottom of the page.

### Editing a Document

1. Select the **Documents** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Documents tab).



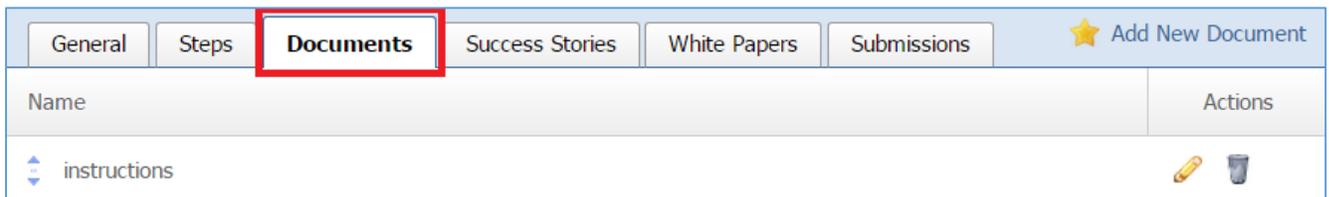
2. Select the **Pencil** icon located to the right of the document you wish to edit.



3. Make the desired changes.
4. Click **Save** at the bottom of the page.

### Removing a Document

1. Select the **Documents** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Documents tab).



2. Select the **Trash** icon located to the right of the document you wish to remove.



3. You will be asked to confirm that you wish to remove the resource. Click **OK**.

### Viewing Success Stories

1. Select the **Success Stories** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Submissions tab).

Under this tab you will be able to view a list with all the success stories that were created using the **Success Stories** module and that they are linked to this specific submission form.

General	Steps	Documents	<b>Success Stories</b>	White Papers	Submissions
Title					
Success Story 1					

### Viewing White Papers

1. Select the **White Papers** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Submissions tab).

Under this tab you will be able to view a list with all the white papers that were created using the **White Papers** module and that they are linked to this specific submission form.

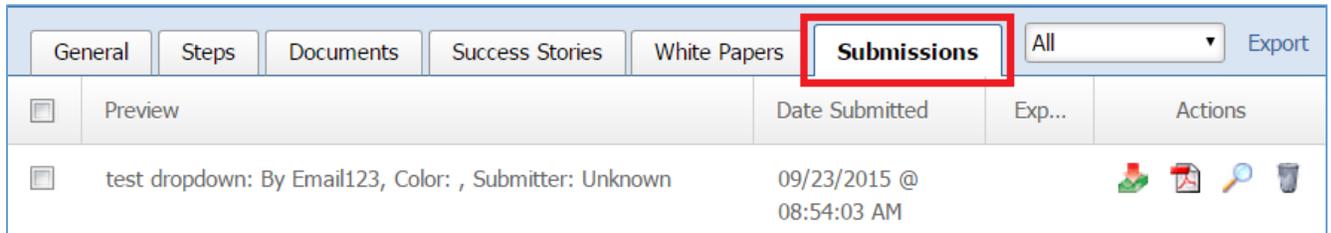
General	Steps	Documents	Success Stories	<b>White Papers</b>	Submissions
Title					
White Paper					

## Managing Submissions

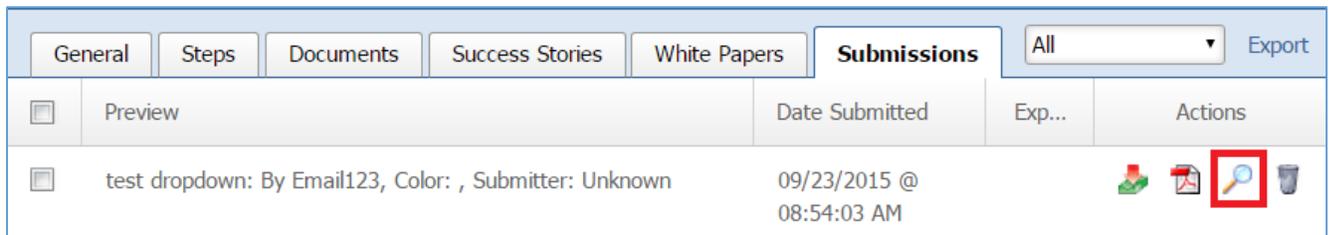
All the submissions, made by the users of the website using a submission form, are available in the **Submissions** tab of the submission form.

### Viewing a Submission

1. Select the **Submissions** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Submissions tab).



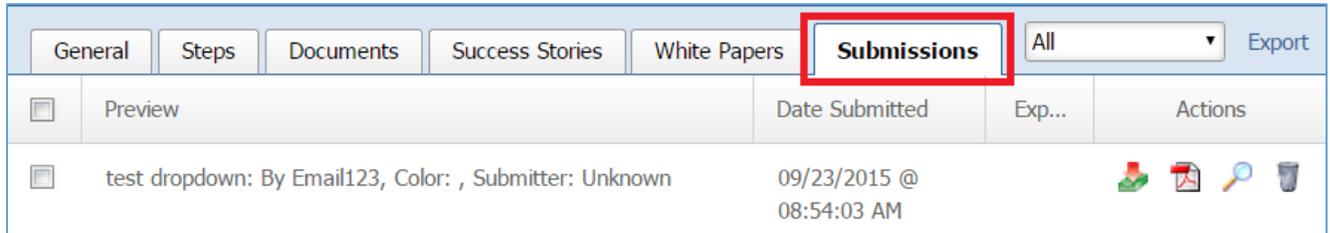
2. Select the **Lens** icon located to the right of the submission you wish to view.



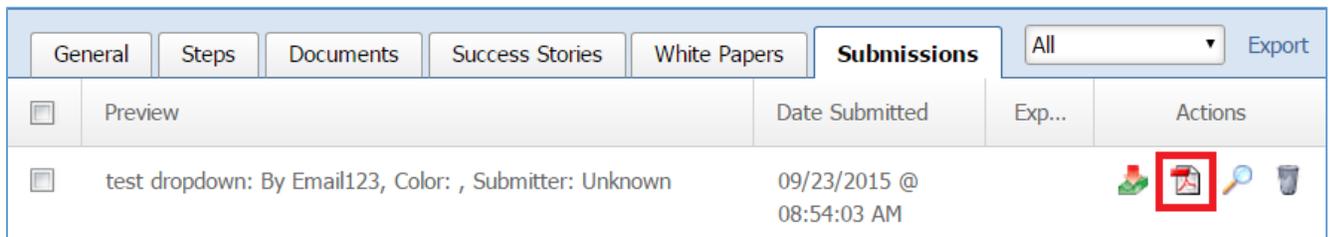
3. View the submission.
4. Click **Back** at the bottom of the page to go back to the submissions.

### Viewing Submission as PDF

1. Select the **Submissions** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Submissions tab).



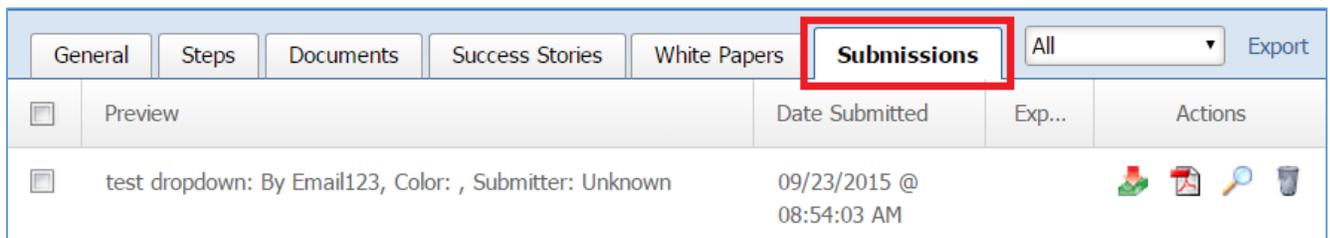
2. Select the **PDF** icon located to the right of the submission you wish to view as PDF.



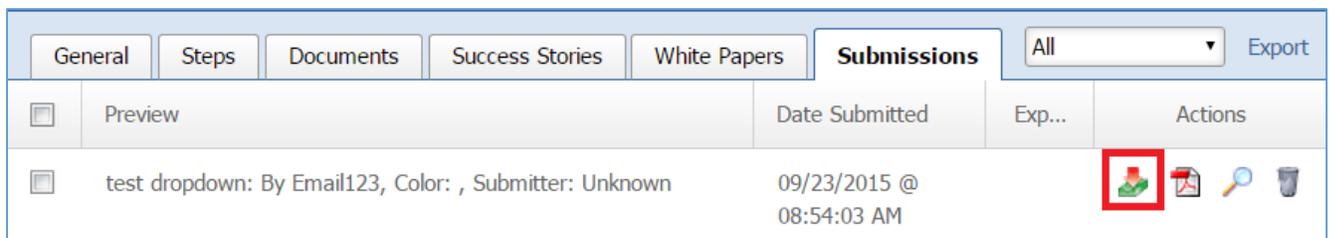
1. View the PDF document.
2. Click the **Back** button of your browser to go back to the Submissions.

### Downloading All the Files in a Submission

1. Select the **Submissions** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Submissions tab).

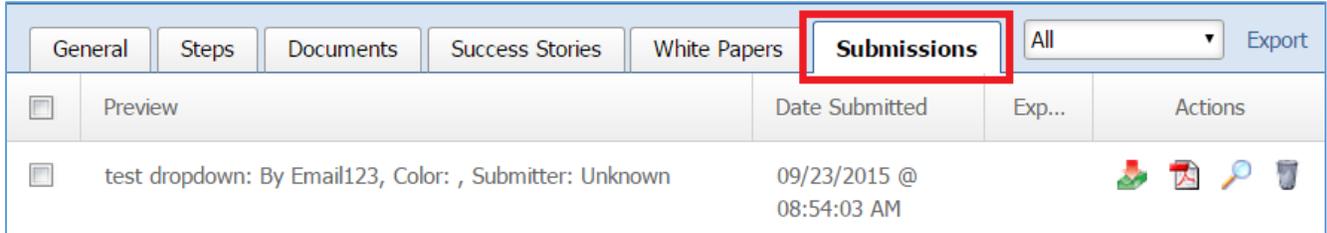


2. Select the **Download** icon located to the right of the submission that you wish to download its fields. If there are any files in the submission, the files will be downloaded to your PC.

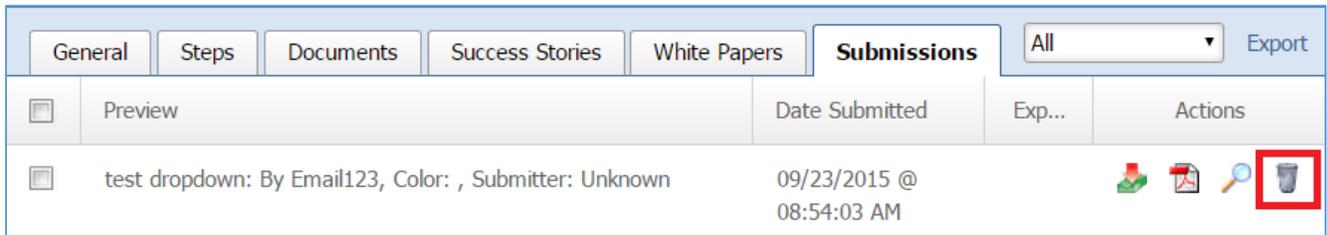


Removing a Submission

1. Select the **Submissions** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Submissions tab).



2. Select the **Trash** icon located to the right of the submission you want to remove.



3. You will be asked to confirm that you wish to remove the submission. Click **OK**.

### Has Multiple Steps: No

This section is applicable when a submission form does not have multiple steps.

If you selected 'No' under **Has Multiple Steps** drop down you will have the following tabs available: General, Fields, Documents, Success Stories, White Papers, and Submissions.

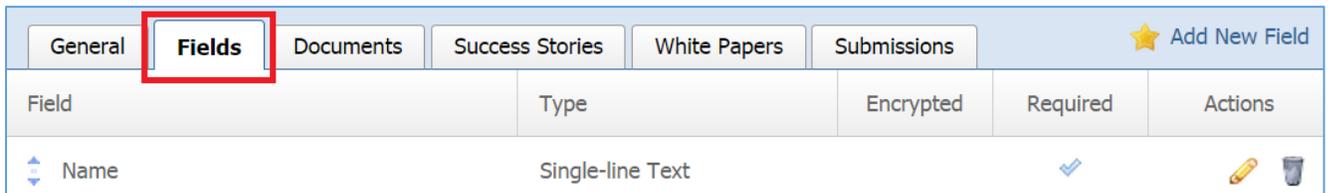


### Managing Fields

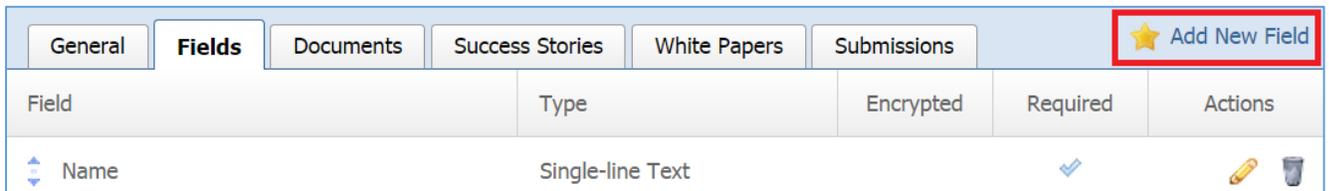
This section is applicable when a submission form does not have multiple steps.

#### Adding a New Field

1. Select the **Fields** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Fields tab).

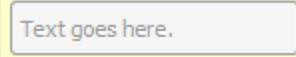
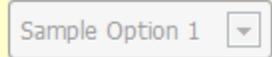
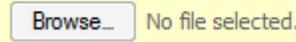


2. Select **Add New Field** located next to the yellow star on the upper right of the **Fields** tab.



3. Under the **Type** option, you have three options: 'Standard Fields', 'Advanced Fields' and 'Separators'. Standard and Advanced fields are to be used when asking for input/answers to questions from your users. Separator fields allow you to enter a break in your submission form. Select one of the standard fields, advanced fields or separators. Below you can find the description of the different types and then instructions on how to fill out each type's fields.

## Standard Fields

Field Type	Type Description
Single-line Text	<p>Allows a user to enter text into a single-line input field.</p>  <p>Text goes here.</p>
Multiple-line Text	<p>Allows a user to enter text into a textarea field.</p>  <p>Line 1 of text goes here. Line 2 of text goes here.</p>
Paragraph Text	<p>Use this option if you'd like to use a field to describe in more detail what field answers should contain. I.e. Use before a section or break to describe question sets. This field does not allow any user input.</p>
Drop-down Custom	<p>Allows a user to select one option from a list of choices.</p>  <p>Sample Option 1 ▾</p>
Check Boxes	<p>Allows a user to select zero or more options of a limited number of choices.</p> <p><input checked="" type="checkbox"/> Sample Option 1 <input type="checkbox"/> Sample Option 2</p>
Radio Buttons	<p>Allows a user to select only one option of a limited number of choices.</p> <p><input checked="" type="radio"/> Sample Option 1 <input type="radio"/> Sample Option 2</p>
File Upload	<p>Allows a user to upload a file.</p>  <p>Browse... No file selected.</p>

## Advanced Fields

Field Type	Type Description
Date	<p>Allows the user to select or type a date.</p> <p><b>Field Name:</b> <input type="text" value="09/18/2015"/>  mm/dd/yyyy</p>
Drop Down: Country	<p>Allows a user to select one country from a list of countries.</p> <p><b>Field Name:</b> <input type="text" value="United States"/> ▼</p>
Drop Down: State	<p>Allows a user to select one state from a list of states.</p> <p><b>Field Name:</b> <input type="text" value="Iowa"/> ▼</p>
Signature	<p>Requires the user to type the name or draw the signature before submitting the form.</p> <p><b>Field Name:</b> <input type="text" value="Sample Name"/> Print your name</p> <p> Draw your signature</p> <p><a href="#">Clear</a></p>

## Separators

Separator	Type Description
Break	<p>Inserts a separator between two fields.</p> <p>-----</p>
Section	<p>Inserts a section between two fields.</p> <p><b>Sample Section</b></p>

Type: Single-line Text

This option allows the user to enter text into a single-line input field.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type: Standard Fields** ▼

Single-line Text

Allows a user to enter text into a single-line input field.

Field Name:

Multiple-line Text

Paragraph Text

Drop-down: Custom

Check Boxes

Radio Buttons

File Upload

**Advanced Fields** ▶

**Separators** ▶

---

**\* Name:**

---

Placeholder:

---

Hint:

---

**\* Encrypt Data:**  ▼

---

**\* Size:**  ▼

---

Max Length:

---

Validate As:  ▼

---

▼ **Settings**

**\* Required:**  ▼

---

**\* Used for Submission Identifier:**  ▼

Set this to 'Yes' if the field can be used to identify the person submitting the form. For example 'First Name' and 'Last Name' are good identifying fields, whereas 'Comments' and 'Phone Number' are not.

---

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Placeholder:** Enter a short text that describes the expected value of the input field (e.g. a sample value or a short description of the expected format). The short hint is displayed in the input field before the user enters a value.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Size:** Specify how big you wish your field to be.

**Max Length:** Specify a maximum length for the user input. In case that the user enter a value with a bigger length that the max length, the submission of the form will fail and the user will be asked to decrease the length of the field to up to maximum.

**Validate At:** Specify if there is any specific validation for the field (e.g. if the field is a valid email address). In case that the input of the user fails does not pass the validation, the submission of the form will fail and the user will be asked to change the value to a valid one.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

**Used for Submission Identifier:** Set this to 'Yes' if the field can be used to identify the person submitting the form. For Example 'First Name' and 'Last Name' are good identifying fields, whereas 'Comments' and 'Phone Numbers' are not.

2. Click **Save** at the bottom of the page.

Type: Multi-line Text

This type allows a user to enter text into a multiple-line text field.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▼

Single-line Text

Multiple-line Text

Allows a user to enter text into a multiple-line text field.

**Field Name:**

Paragraph Text

Drop-down: Custom

Check Boxes

Radio Buttons

File Upload

**Advanced Fields** ▶

**Separators** ▶

---

**\* Name:**

---

Placeholder:

---

Hint:

---

**\* Encrypt Data:**

---

**\* Size:**

---

Max Length:

▼ **Settings**

**\* Required:**

---

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Placeholder:** Enter a short text that describes the expected value of the input field (e.g. a sample value or a short description of the expected format). The short hint is displayed in the input field before the user enters a value.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Size:** Specify how big you wish your field to be.

**Max Length:** Specify a maximum length for the user input. In case that the user enter a value with a bigger length than the max length, the submission of the form will fail and the user will be asked to decrease the length of the field to up to maximum.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.

Type: Paragraph Text

This type inserts one or more paragraphs of text within the form. It does not allow any user input but it is used to make any text (e.g. instructions, information) available to the user within the form.

1. Fill out the fields with the desired values.

The screenshot shows a configuration window for a 'Paragraph Text' field. The 'General' tab is active, showing options for 'Type' (Standard Fields) with 'Paragraph Text' selected. A yellow tooltip explains that this field type inserts text without allowing user input. Below this, there are sections for 'Advanced Fields' and 'Separators'. The 'Name' field is empty. 'Scrolling Display' is set to 'No', and 'Display With Confirmation & Notifications' is set to 'Yes'. The 'Text' tab is also visible, showing a rich text editor toolbar with options like Bold, Italic, Underline, and text alignment. At the bottom, there are 'Save' and 'Cancel' buttons.

**Name:** Enter the Name of your field. The name will not be available to the user.

**Scrolling Display:** Select 'Yes' if you wish to apply a scroll bar to the designated area (e.g. when the text is very long). Otherwise select 'No'.

**Display with Confirmation & Notifications:** Select 'Yes' if you wish the field to be included on the confirmation page and emails. Otherwise select 'No' (e.g. if the field is only intended to provide instructions to the user).

**Text:** Enter the text that you wish to be displayed using the text editor.

2. Click **Save** at the bottom of the page.

Type: Drop Down: Custom

This type of field allows a user to select one option from a list of choices.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▼

Single-line Text

Multiple-line Text

Paragraph Text

Drop-down: Custom

Allows a user to select one option from a list of choices.

Field Name:

Check Boxes

Radio Buttons

File Upload

**Advanced Fields** ▶

**Separators** ▶

---

**\* Name:**

---

Placeholder:

---

Hint:

---

**\* Encrypt Data:**

---

▼ **Settings**

**\* Required:**

---

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Placeholder:** Enter a short text that describes the expected value of the input field (e.g. a sample value or a short description of the expected format). The short hint is displayed in the input field before the user enters a value.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.
3. Add the **Field Options**

*Adding a New Field Option*

1. Select **Add New Field Option** located next to the yellow star on the upper right of the page.



2. Fill out the fields from your field option.

**General**

\* **Name:**

---

\* **Value:**

---

\* **Enabled:**  Yes  No

**Name:** This is what it will be displayed to the user as an option.

**Value:** The value is that it will be stored to the database if the option will be selected by the user.

**Enabled:** Select 'Yes' to enable this option in order to be available to the user. Otherwise select 'No'.

3. Click Save at the bottom of the page.

*Adding a New Conditional Field*

A conditional field is a field that is displayed to a user only if the user selected a specific field option from the list of field options. You have to add any field options only when this is your case.

1. Select the **List Options with the Plus sign** icon located next to the field option to which you want to add conditional fields.



2. Fill out the fields for your conditional field. For detailed instructions about how to fill out a conditional field you can refer to the **Adding a New Field** section.

▼ **General**

 This field will be displayed if the 'By Email' option is selected.

**\* Type:** **Standard Fields** ▶  
**Advanced Fields** ▶  
**Separators** ▶

---

**\* Name:**

3. Click **Save** at the bottom of the page.

Type: Check Boxes

This type of field allows a user to select zero or more options of a limited number of choices.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▼

- Single-line Text
- Multiple-line Text
- Paragraph Text
- Drop-down: Custom
- Check Boxes

Allows a user to select zero or more options of a limited number of choices.

Field Name:  Sample Option 1  
 Sample Option 2

- Radio Buttons
- File Upload

**Advanced Fields** ▶

**Separators** ▶

---

**\* Name:**

---

Hint:

---

**\* Encrypt Data:**

---

**\* Display Options in Columns:**

---

**\* Hide Label:**

Set this to Yes in order to hide the label. Hiding the label will also hide the required check mark.

▼ **Settings**

**\* Required:**

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Display Options in Columns:** Select in how many columns you wish the options to be displayed.

**Hide Label:** Select 'Yes' if you wish to hide from the user the label (the name of the field), otherwise select 'No'. It should be note that hiding the label will also hide the required check mark.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.
3. Add the **Field Options**

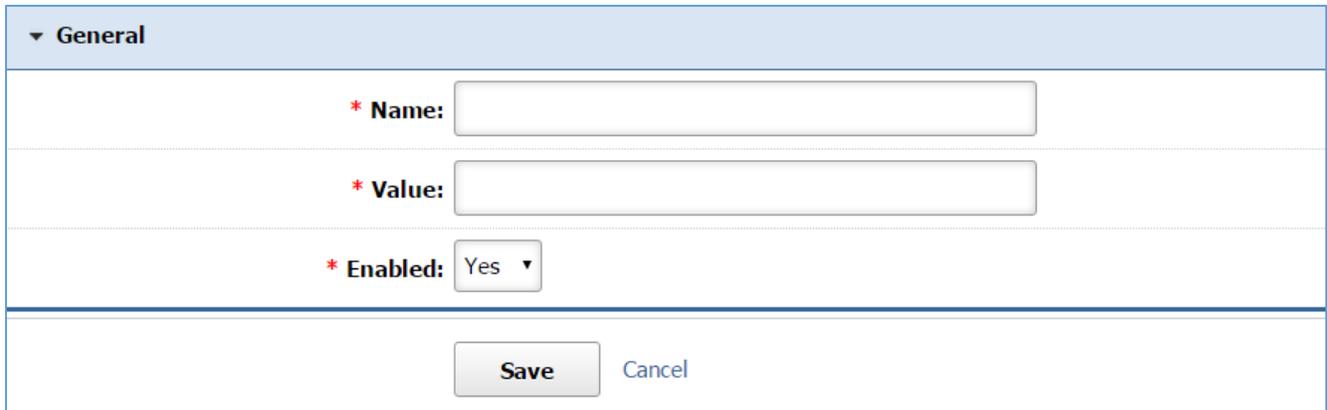
#### Adding a New Field Option

1. Select **Add New Field Option** located next to the yellow star on the upper right of the page.



Name	Has Conditional Fields	Actions
By Email		

2. Fill out the fields from your field option.



**General**

\* Name:

\* Value:

\* Enabled: Yes ▾

Save Cancel

**Name:** This is what it will be displayed to the user as an option.

**Value:** The value is that it will be stored to the database if the option will be selected by the user.

**Enabled:** Select 'Yes' to enable this option in order to be available to the user. Otherwise select 'No'.

3. Click Save at the bottom of the page.

#### Adding a New Conditional Field

A conditional field is a field that is displayed to a user only if the user selected a specific field option from the list of field options. You have to add any field options only when this is your case.

1. Select the **List Options with the Plus sign** icon located next to the field option to which you want to add conditional fields.

General		Field Options	★ Add New Field Option
Name	Has Conditional Fields	Actions	
By Email			  

2. Fill out the fields for your conditional field. For detailed instructions about how to fill out a conditional field you can refer to the **Adding a New Field** section.

▼ **General**

 This field will be displayed if the 'By Email' option is selected.

**\* Type:** **Standard Fields** ▶  
**Advanced Fields** ▶  
**Separators** ▶

---

**\* Name:**

3. Click **Save** at the bottom of the page.

Type: Radio Buttons

This type allows a user to select only one option of a limited number of choices.

1. Fill out the fields with the desired values.

▼ **General**

\* **Type:** Standard Fields ▼

- Single-line Text
- Multiple-line Text
- Paragraph Text
- Drop-down: Custom
- Check Boxes
- Radio Buttons

Allows a user to select only one option of a limited number of choices.

**Field Name:**  Sample Option 1  
 Sample Option 2

File Upload

**Advanced Fields** ▶

**Separators** ▶

---

\* **Name:**

Hint:

---

\* **Encrypt Data:** No ▼

---

\* **Display Options in Columns:** Select... ▼

▼ **Settings**

\* **Required:** No ▼

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Display Options in Columns:** Select in how many columns you wish the options to be displayed.

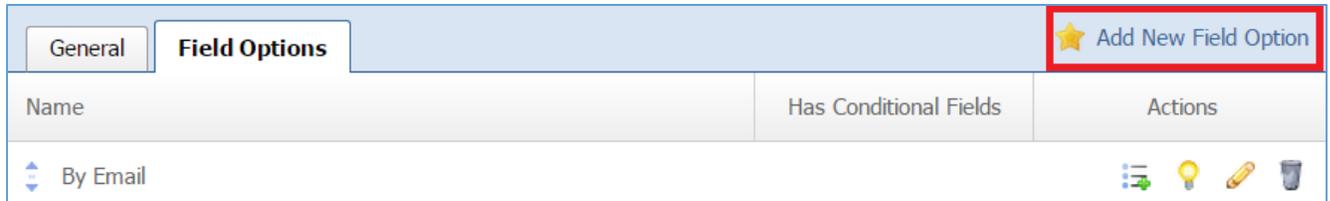
**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.

### 3. Add the **Field Options**

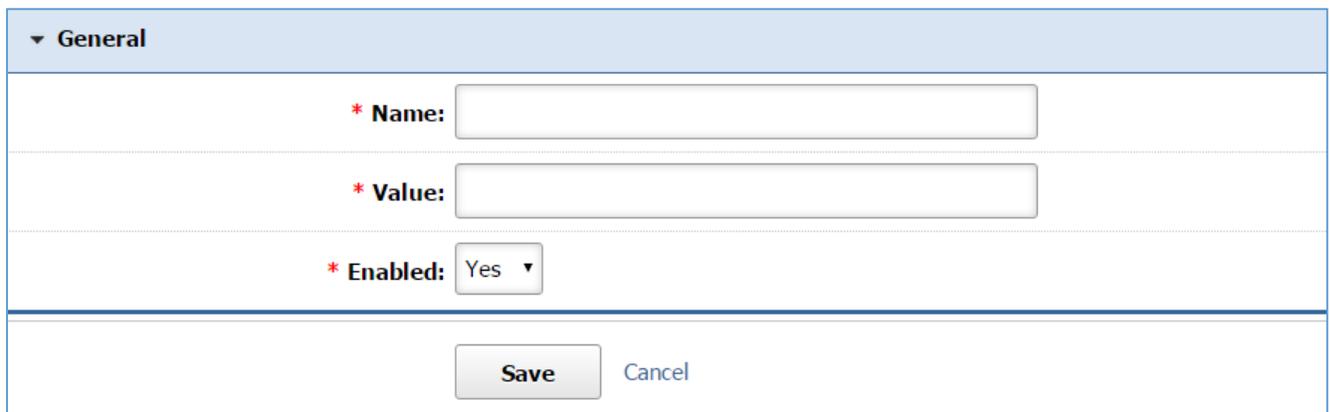
#### Adding a New Field Option

1. Select **Add New Field Option** located next to the yellow star on the upper right of the page.



Name	Has Conditional Fields	Actions
By Email		   

2. Fill out the fields from your field option.



**General**

\* Name:

\* Value:

\* Enabled: Yes ▾

**Name:** This is what it will be displayed to the user as an option.

**Value:** The value is that it will be stored to the database if the option will be selected by the user.

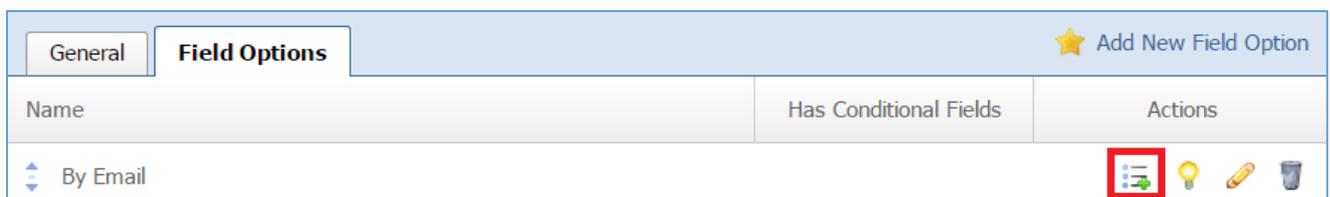
**Enabled:** Select 'Yes' to enable this option in order to be available to the user. Otherwise select 'No'.

3. Click Save at the bottom of the page.

#### Adding New Conditional Field

A conditional field is a field that is displayed to a user only if the user selected a specific field option from the list of field options. You have to add any field options only when this is your case.

1. Select the **List Options with the Plus sign** icon located next to the field option to which you want to add conditional fields.



Name	Has Conditional Fields	Actions
By Email		   

2. Fill out the fields for your conditional field. For detailed instructions about how to fill out a conditional field you can refer to the **Adding a New Field** section.

▼ **General**

 This field will be displayed if the 'By Email' option is selected.

\* **Type:** **Standard Fields** ▶  
**Advanced Fields** ▶  
**Separators** ▶

---

\* **Name:**

3. Click **Save** at the bottom of the page.

Type: File Upload

This type allows a user to upload a file.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▼

- Single-line Text
- Multiple-line Text
- Paragraph Text
- Drop-down: Custom
- Check Boxes
- 
- File Upload

Allows a user to upload a file.

**Field Name:**  No file chosen

**Advanced Fields** ▶

**Separators** ▶

---

**\* Name:**

---

**Hint:**

---

**\* Encrypt Data:**  ▼

---

**\* Accepted Formats:**

- Images
- Text Files
- Word Documents
- Excel Documents
- PowerPoint Documents
- PDFs
- Zip Archives
- Graphic Files

▼ **Settings**

**\* Required:**  ▼

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Accepted Formats:** Select all the accepted image format that a user is able to upload. In case that the user select an image that does not have the accepted format, the submission of the form will fail and the user will be asked to choose a different image.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.

Type: Date

This type allows the user to pick a date from the calendar or to type a date.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▶

**Advanced Fields** ▼

Date

Allows the user to select or type a date.

Field Name:

Drop-down: Country

Drop-down: State

Signature

**Separators** ▶

---

**\* Name:**

---

**\* Expected Format:**

---

Placeholder:

---

Hint:

---

Minimum Selectable Date:

A number of days from today. For example 2 represents two days from today and -1 represents yesterday.

---

Maximum Selectable Date:

A number of days from today. For example 2 represents two days from today and -1 represents yesterday.

---

**\* Encrypt Data:**

---

**\* Size:**

---

**\* Date Selection:**

Allow or disallow the users to type a date.

---

▼ **Settings**

**\* Required:**

---

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Expected Format:** Select the expected date format (e.g. mm/dd/yyyy).

**Placeholder:** Enter a short text that describes the expected value of the input field (e.g. a sample value or a short description of the expected format). The short hint is displayed in the input field before the user enters a value.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Minimum Selectable Date:** Specify the minimum number of days from today. If the user enters a date prior to the minimum selectable date, the submission of the form will fail and the user will be asked to choose a different date. If you do not wish to have such a constraint, leave this field empty.

**Maximum Selectable Date:** Specify the maximum number of days from today. If the user enters a date later than the maximum selectable date, the submission of the form will fail and the user will be asked to choose a different date. If you do not wish to have such a constraints, leave this field empty.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Size:** Specify how big you wish your field to be.

**Date Selection:** Select 'Select only' if you want to prevent the user for typing the date. Otherwise select 'Select or Type' in order to allow the user either to select the date from the calendar or to type it.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.

Type: Drop Down: Country

This type allows a user to select one country from a list of countries.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▶

**Advanced Fields** ▼

Date

Drop-down: Country

Allows a user to select one country from a list of countries.

**Field Name:** United States ▼

Drop-down: State

Signature

**Separators** ▶

---

**\* Name:**

---

Placeholder:

---

Hint:

---

**\* Encrypt Data:** No ▼

---

▼ **Settings**

**\* Required:** No ▼

---

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Placeholder:** Enter a short text that describes the expected value of the input field (e.g. a sample value or a short description of the expected format). The short hint is displayed in the input field before the user enters a value.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.

Type: State

This type allows a user to select one state from a list of states.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▶

**Advanced Fields** ▼

Date

Drop-down: Country

Drop-down: State

Allows a user to select one state from a list of states.

**Field Name:** Iowa ▼

Signature

**Separators** ▶

---

**\* Name:**

---

Placeholder:

---

Hint:

---

**\* Encrypt Data:** No ▼

▼ **Settings**

**\* Required:** No ▼

**Name:** Enter the Name of your field which will be available as the label text of the input field.

**Placeholder:** Enter a short text that describes the expected value of the input field (e.g. a sample value or a short description of the expected format). The short hint is displayed in the input field before the user enters a value.

**Hint:** A short descriptive text that is available on mouse over and describes the field.

**Encrypt Data:** In case of sensitive data, i.e. Credit Card Number, select 'Yes'.

**Required:** Specify if this field is required. In case that a required field is not filled out by the user, the submission of the form will fail and the user will be asked to fill out the required field.

2. Click **Save** at the bottom of the page.

Type: Signature

This type requires the user to type the name or draw the signature before submitting the form.

1. Fill out the fields with the desired values.

▼ **General**

**\* Type:** Standard Fields ▶

**Advanced Fields** ▼

- Date
- Drop-down: Country
- Drop-down: State
- Signature

Requires the user to type the name or draw the signature before submitting the form.

Field Name:  Print your name

Draw your signature

[Clear](#)

**Separators** ▶

**\* Name:**

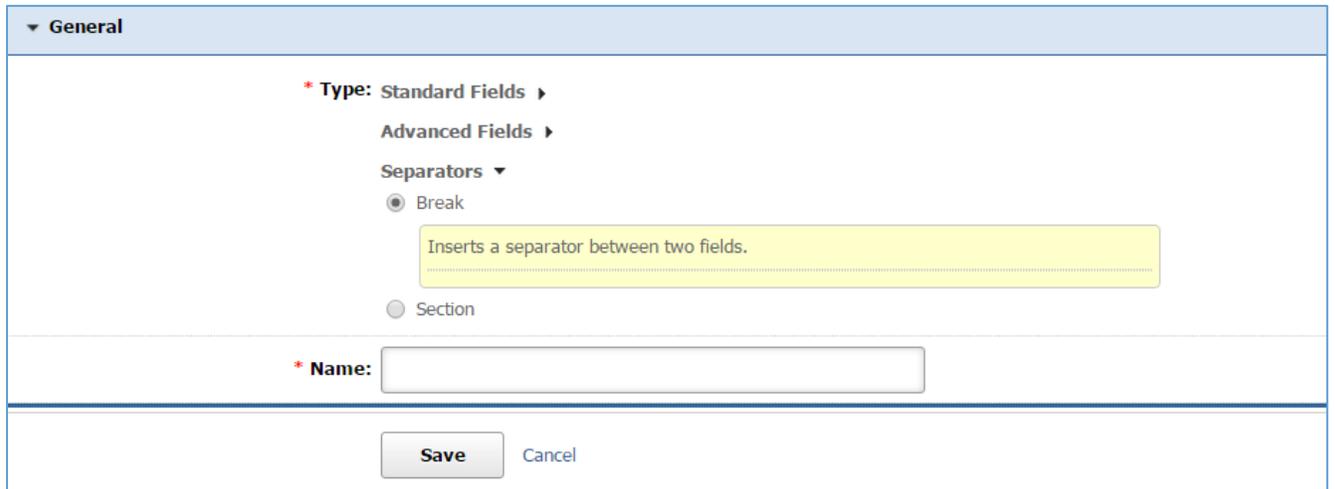
**Name:** Enter the Name of your field which will be available as the label text of the input field.

2. Click **Save** at the bottom of the page.

Type: Break Separator

This type inserts a separator between two fields.

1. Fill out the fields with the desired values.



The screenshot shows a configuration window with a blue header bar labeled "General". Below the header, there are several sections:

- \* Type:** Standard Fields ▶
- Advanced Fields ▶
- Separators ▼
- Break
- Inserts a separator between two fields. (highlighted in yellow)
- Section

---

**\* Name:** [Empty text input field]

At the bottom of the form, there are two buttons: "Save" and "Cancel".

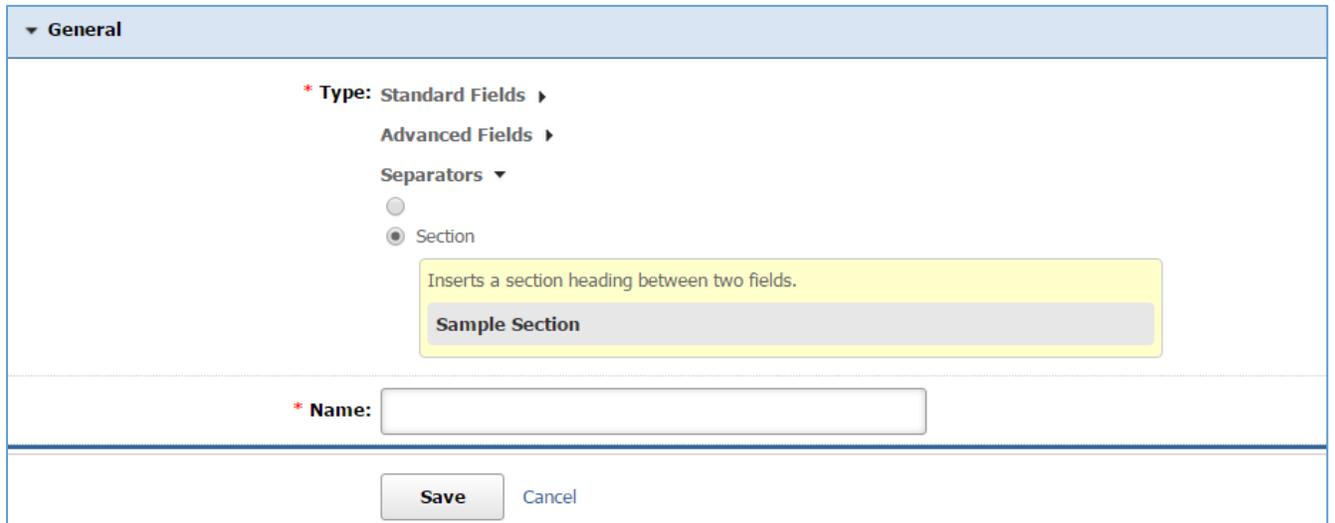
**Name:** Enter the Name of your field which will be available as the label text of the input field.

2. Click **Save** at the bottom of the page.

Type: Section Separator

This type inserts a section heading between two fields.

1. Fill out the fields with the desired values.



The screenshot shows a configuration window with a blue header bar labeled "General". Inside the window, there are several sections: "\* Type: Standard Fields" with a right-pointing arrow, "Advanced Fields" with a right-pointing arrow, and "Separators" with a downward-pointing arrow. Under "Separators", there are two radio buttons: the first is unselected, and the second is selected and labeled "Section". Below the radio buttons is a yellow-bordered box containing the text "Inserts a section heading between two fields." and a grey sample box containing the text "Sample Section". At the bottom of the configuration area, there is a label "\* Name:" followed by an empty text input field. At the very bottom of the window, there are two buttons: "Save" and "Cancel".

**Name:** Enter the Name of your field which will be available as the label text of the input field.

2. Click **Save** at the bottom of the page.

### Editing a Field

1. Select the **Fields** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Fields tab).
2. Select the **Pencil** icon located to the right of the field.

General					<b>Fields</b>					Documents					Success Stories					White Papers					Submissions					★ Add New Field				
Field										Type										Encrypted					Required					Actions				
Name										Single-line Text															✓					 				

3. Make the desired changes to the field.
4. Click **Save** at the bottom of the page.

### Removing a Field

1. Select the **Fields** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Fields tab).
2. Select the **Trash** icon located to the right of the field.

General					<b>Fields</b>					Documents					Success Stories					White Papers					Submissions					★ Add New Field				
Field										Type										Encrypted					Required					Actions				
Name										Single-line Text															✓					 				

3. You will be asked to confirm that you wish to remove the field option. Click 'OK'.

## Managing Field Options

Field Options apply only to **Drop Down: Custom** and to **Radio Button** types if fields.

### Adding a New Field Option

1. Select the **Fields** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Fields tab).

General	<b>Fields</b>	Documents	Success Stories	White Papers	Submissions	★ Add New Field		
Field	Type	Encrypted	Required	Actions				
↕ Name	Single-line Text		✓	✎ 🗑				

2. Select the **Pencil** icon located to the right of the field you wish to manage its field options.

General	<b>Fields</b>	Documents	Success Stories	White Papers	Submissions	★ Add New Field		
Field	Type	Encrypted	Required	Actions				
↕ Name	Single-line Text		✓	✎ 🗑				

3. Select the **Field Options** tab located into the field.

General	<b>Field Options</b>	★ Add New Field Option			
Name	Has Conditional Fields	Actions			
↕ Red		☰	💡	✎	🗑

4. Select **Add New Field Option** located next to the yellow star on the upper right of the page.

General	Field Options	★ Add New Field Option			
Name	Has Conditional Fields	Actions			
↕ By Email		☰	💡	✎	🗑

5. Fill out the fields from your field option.

▼ General	
* Name:	<input type="text"/>
* Value:	<input type="text"/>
* Enabled:	<input type="button" value="Yes"/> ▼
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

**Name:** This is what it will be displayed to the user as an option.

**Value:** The value is that it will be stored to the database if the option will be selected by the user.

**Enabled:** Select 'Yes' to enable this option in order to be available to the user. Otherwise select 'No'.

6. Click Save at the bottom of the page.

### Editing a Field Option

1. Select the **Fields** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Fields tab).

The screenshot shows a navigation bar with tabs: General, **Fields**, Documents, Success Stories, White Papers, and Submissions. A yellow star icon and the text 'Add New Field' are on the right. Below the navigation bar is a table with columns: Field, Type, Encrypted, Required, and Actions. The first row shows 'Name' under Field, 'Single-line Text' under Type, a checkmark under Encrypted, a checkmark under Required, and a pencil icon and a trash can icon under Actions.

2. Select the **Pencil** icon located to the right of the field you wish to manage its field options.

This screenshot is identical to the previous one, but the pencil icon in the Actions column of the table is highlighted with a red box.

3. Select the **Field Options** tab located into the field.

The screenshot shows the navigation bar with tabs: General, **Field Options**, Documents, Success Stories, White Papers, and Submissions. A yellow star icon and the text 'Add New Field Option' are on the right. Below the navigation bar is a table with columns: Name, Has Conditional Fields, and Actions. The first row shows 'Red' under Name, 'Has Conditional Fields' under Has Conditional Fields, and a list icon, a lightbulb icon, a pencil icon, and a trash can icon under Actions.

4. Select the **Pencil** icon located to the right of the field option you wish to edit.

This screenshot is identical to the previous one, but the pencil icon in the Actions column of the table is highlighted with a red box.

5. Make the desired changes to the field option.
6. Click **Save** at the bottom of the page.

## Removing a Field Option

1. Select the **Fields** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Fields tab).

Field	Type	Encrypted	Required	Actions
Name	Single-line Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 

2. Select the **Pencil** icon located to the right of the field you wish to manage its field options.

Field	Type	Encrypted	Required	Actions
Name	Single-line Text	<input type="checkbox"/>	<input checked="" type="checkbox"/>	 

3. Select the **Field Options** tab located into the field.

Name	Has Conditional Fields	Actions
Red	<input type="checkbox"/>	   

4. Select the **Trash** icon located to the right of the field option you wish to remove.

Name	Has Conditional Fields	Actions
Red	<input checked="" type="checkbox"/>	    

5. You will be asked to confirm that you wish to remove the field option. Click **OK**.

### Managing Conditional Fields

Conditional Fields apply only to **Drop Down: Custom** and to **Radio Button** types of fields and each conditional field is associated with a Field Option.

Adding a New Conditional Field

1. Select the **Fields** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Fields tab).

General <b>Fields</b> Documents Success Stories White Papers Submissions <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
↑ ↓ Name	Single-line Text		<input checked="" type="checkbox"/>	 

2. Select the **Pencil** icon located to the right of the field you wish to manage its field options.

General <b>Fields</b> Documents Success Stories White Papers Submissions <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
↑ ↓ Name	Single-line Text		<input checked="" type="checkbox"/>	 

3. Select the **Field Options** tab located into the field.

Select the **Steps** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>				
Name	Abbreviation	Actions		
Step1	Contact Details	  		

4. Select the **List** icon located to the right of your step to manage the fields of this step.

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>				
Name	Abbreviation	Actions		
Step1	Contact Details	  		

5. Select the **Fields** tab located into the step.

General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
↑ ↓ Color	Drop-down: Custom			 

6. Select the **Pencil** icon located to the right of the field you wish to manage its field options.

General		Fields	★ Add New Field		
Field	Type	Encrypted	Required	Actions	
Color	Drop-down: Custom			 	

7. Select the **Field Options** tab located into the field.

General		Field Options	★ Add New Field Option		
Name	Has Conditional Fields	Actions			
Red		   			

8. When a field option has conditional fields, a **Tick** icon is displayed at the right of the field option, under the **Has Conditional Fields** column, and a list icon is available.

9. Select the **List** icon located to the right of the field option.

General		Field Options	★ Add New Field Option		
Name	Has Conditional Fields	Actions			
By Email		   			

10. All the conditional fields of the selected field option are available under the **Conditional Fields** tab.

General		Conditional Fields	★ Add New Conditional Field		
Field	Type	Encrypted	Required	Actions	
Email Address	Single-line Text			 	

11. Select **Add New Conditional Field** located next to the yellow star on the upper right of the page.

General		Conditional Fields	★ Add New Conditional Field		
Field	Type	Encrypted	Required	Actions	
Email Address	Single-line Text			 	

12. Fill out the fields for the conditional field. For detail instruction about the field types you can go to **Managing Fields** section.

13. Click **Save** at the bottom of the page.



## Editing a Conditional Field

1. Select the Steps tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>		
Name	Abbreviation	Actions
Step1	Contact Details	  

2.

Select the **List** icon located to the right of your step to manage the fields of this step.

General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>		
Name	Abbreviation	Actions
Step1	Contact Details	  

3.

4. Select **the** Fields tab located into the step.

General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
Color	Drop-down: Custom			 

5.

6. Select the Pencil icon located to the right of the field you wish to manage its field options.

General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
Color	Drop-down: Custom			 

7. Select the **Field Options** tab located into the field.

General <b>Field Options</b> <span>★ Add New Field Option</span>		
Name	Has Conditional Fields	Actions
Red		   

8.

9. When a field option has conditional fields, a Tick icon is displayed at the right of the field option, under the **Has Conditional Fields** column, and a list icon is *available*.

10. Select the **List** icon located to the right of the field option.

General		Field Options	★ Add New Field Option	
Name	Has Conditional Fields	Actions		
By Email	<input checked="" type="checkbox"/>			

11. All the conditional fields of the selected field option are available under the **Conditional Fields** tab.

General		Conditional Fields	★ Add New Conditional Field		
Field	Type	Encrypted	Required	Actions	
Email Address	Single-line Text		<input checked="" type="checkbox"/>		

12. Select the **Pencil** icon located next to the conditional field you wish to edit.

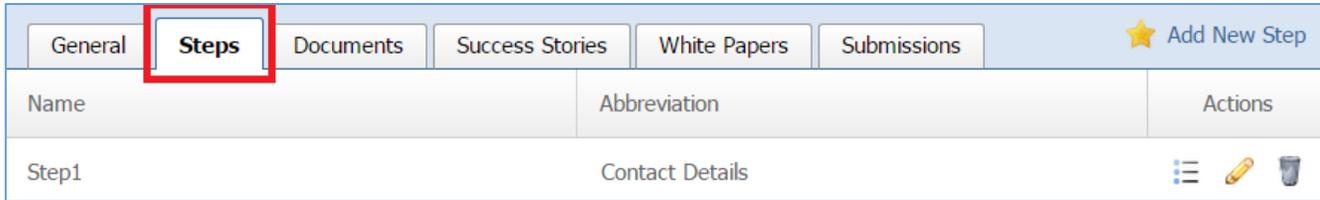
General		Conditional Fields	★ Add New Conditional Field		
Field	Type	Encrypted	Required	Actions	
Email Address	Single-line Text		<input checked="" type="checkbox"/>		

13. Edit the conditional field.

14. Once you have made the desired changes, click **Save** at the bottom of the page.

## Removing a Conditional Field

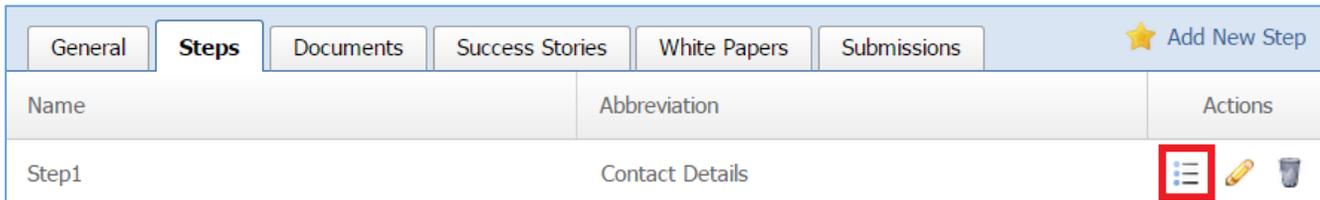
1. Select the Steps tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Steps tab).



General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>		
Name	Abbreviation	Actions
Step1	Contact Details	  

2.

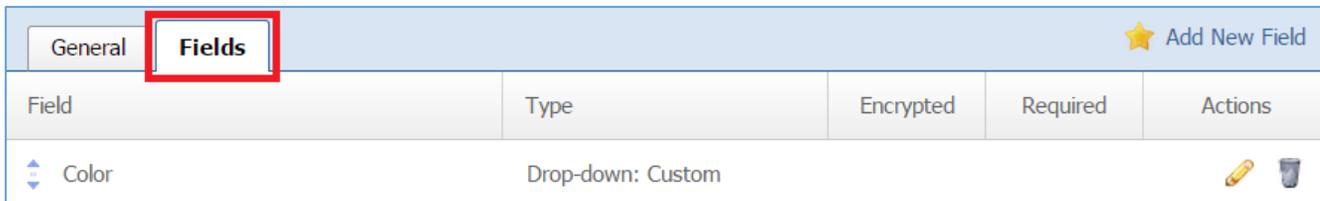
Select the **List** icon located to the right of your step to manage the fields of this step.



General <b>Steps</b> Documents Success Stories White Papers Submissions <span>★ Add New Step</span>		
Name	Abbreviation	Actions
Step1	Contact Details	  

3.

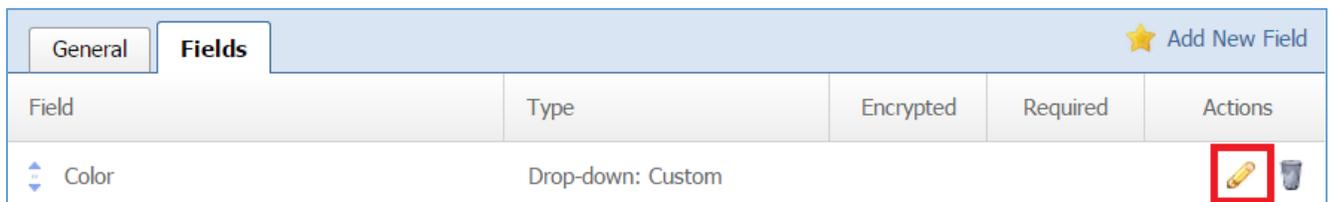
4. Select **the** Fields tab located into the step.



General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
Color	Drop-down: Custom			 

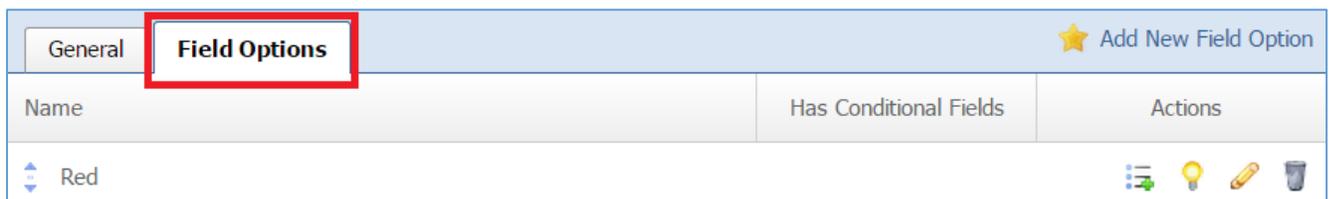
5.

6. Select the Pencil icon located to the right of the field you wish to manage its field options.



General <b>Fields</b> <span>★ Add New Field</span>				
Field	Type	Encrypted	Required	Actions
Color	Drop-down: Custom			 

7. Select the **Field Options** tab located into the field.



General <b>Field Options</b> <span>★ Add New Field Option</span>		
Name	Has Conditional Fields	Actions
Red		   

8.

9. When a field option has conditional fields, a Tick icon is displayed at the right of the field option, under the **Has Conditional Fields** column, and a list icon is *available*.

10. Select the **List** icon located to the right of the field option.

General		Field Options	★ Add New Field Option	
Name	Has Conditional Fields	Actions		
By Email	<input checked="" type="checkbox"/>			

11. All the conditional fields of the selected field option are available under the **Conditional Fields** tab.

General		Conditional Fields	★ Add New Conditional Field		
Field	Type	Encrypted	Required	Actions	
Email Address	Single-line Text		<input checked="" type="checkbox"/>		

Select the **Trash** icon located to the right of the conditional field you wish to remove.

General		Conditional Fields	★ Add New Conditional Field		
Field	Type	Encrypted	Required	Actions	
Email Address	Single-line Text		<input checked="" type="checkbox"/>		

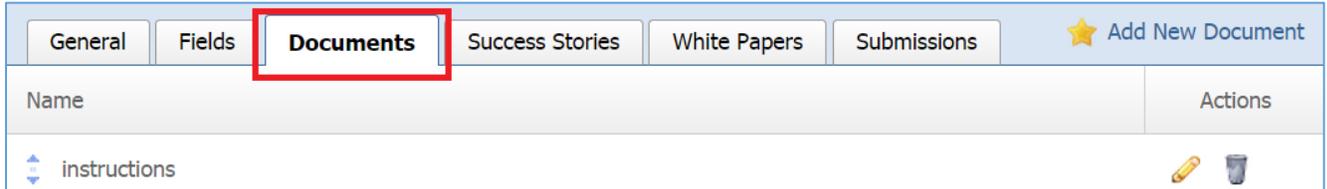
12. You will be asked to confirm that you wish to remove the conditional field. Click 'OK'.

## Managing Documents

This feature allows you to have documents in your submission forms.

### Adding a New Document

1. Select the **Documents** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Documents tab).



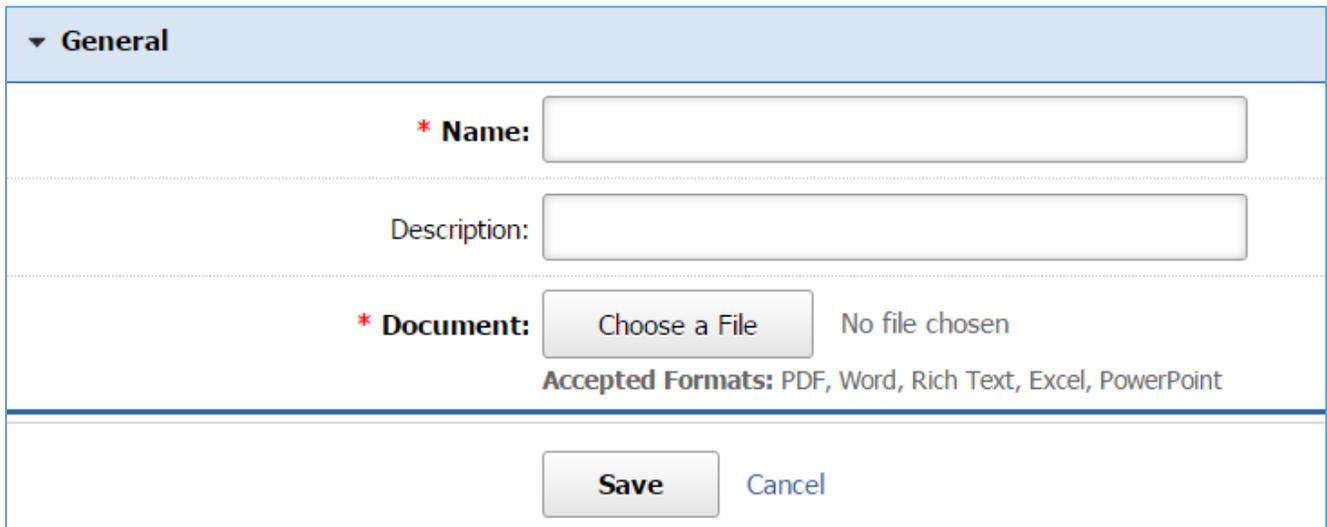
General	Fields	<b>Documents</b>	Success Stories	White Papers	Submissions	★ Add New Document
Name						Actions
instructions						 

2. Select the **Add New Document** located next to the yellow star on the upper right of your page.



General	Fields	<b>Documents</b>	Success Stories	White Papers	Submissions	★ <b>Add New Document</b>
Name						Actions
instructions						 

3. Fill out the fields for your new document.



**General**

\* **Name:**

Description:

\* **Document:**  No file chosen

**Accepted Formats:** PDF, Word, Rich Text, Excel, PowerPoint

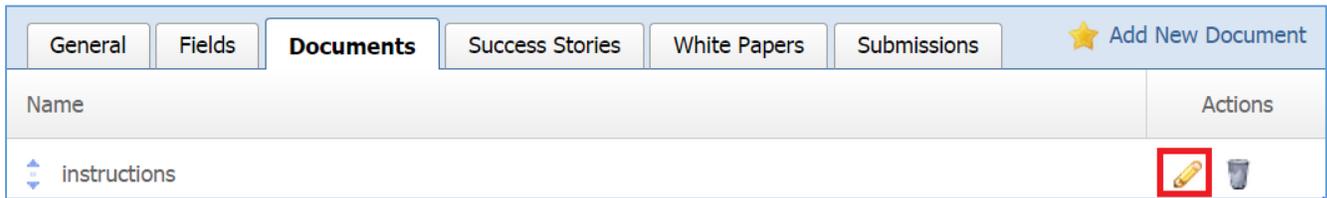
4. Click **Save** at the bottom of the page.

### Editing a Document

1. Select the **Documents** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Documents tab).



2. Select the **Pencil** icon located to the right of the document you wish to edit.



3. Make the desired changes.
4. Click **Save** at the bottom of the page.

### Removing a Document

1. Select the **Documents** tab located into your submission form (if you are not in the submission form, edit your submission form and then go to the Documents tab).



2. Select the **Trash** icon located to the right of the document you wish to remove.



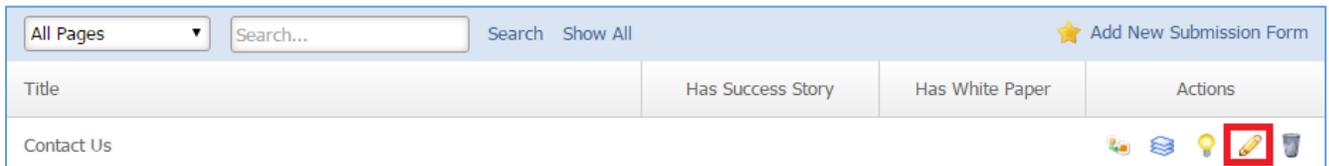
3. You will be asked to confirm that you wish to remove the resource. Click **OK**.

## Editing a Submission Form

1. From the main page of the Administrative website, select **Submission Forms module**, located under the **Manage Content Modules** box.



2. Select the **Pencil** icon located at the right of the submission form.



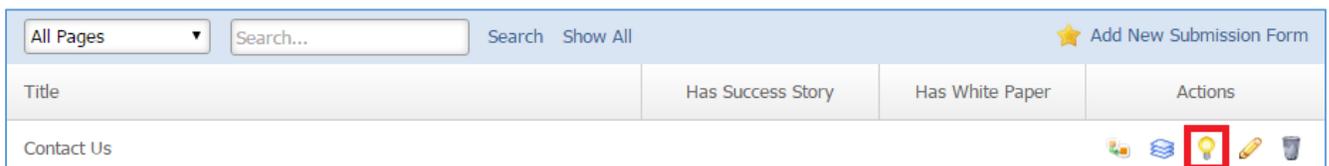
3. Edit the submission form.
4. Once you have made the desired changes, click **Save** at the bottom of the page.

## Enabling / Disabling a Submission Form

1. From the main page of the Administrative website, select **Submission Forms module**, located under the **Manage Content Modules** box.



2. Select the **Lamp** icon located to the right of the submission form you wish to enable or disable.



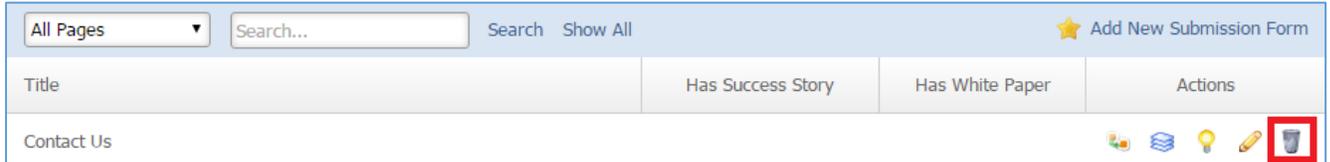
## Removing a Submission Form

1. From the main page of the Administrative website, select **Submission Forms module**, located under the **Manage Content Modules** box.



The screenshot shows a vertical list of content management modules. The 'Submission Forms' module is highlighted with a red rectangular box. The modules listed are: Staff Directory • Categories, Submission Forms, Success Stories, and Testimonials. Each module includes a small icon and a brief description of its function.

2. Select the **Trash** icon located to the right of the submission form you wish to remove.



The screenshot displays the management interface for submission forms. At the top, there is a navigation bar with a dropdown menu set to 'All Pages', a search input field, and a 'Search' button. To the right of the search bar is a 'Show All' link and a star icon labeled 'Add New Submission Form'. Below the navigation bar is a table with columns for 'Title', 'Has Success Story', 'Has White Paper', and 'Actions'. The first row of the table contains the entry 'Contact Us'. In the 'Actions' column for 'Contact Us', there are several icons: a globe, a database symbol, a lightbulb, a pencil, and a trash can. The trash can icon is highlighted with a red rectangular box.

3. You will be asked to confirm that you wish to remove the submission form. Click **OK**.

## Copying a Submission Form

1. Select the **Duplicate** icon located to the right of the submission form you wish to copy.

All Pages <input type="text" value="Search..."/> Search Show All <span>★ Add New Submission Form</span>			
Title	Has Success Story	Has White Paper	Actions
Contact Us			    

### Notes:

- a. A new identical submission form will be created that will have the same name as the original submission form with the text **(copy)** at the end.
- b. The new form is identical to the original form but you can edit its name or/and make any changes you wish, without affecting the original submission form.
- c. The new submission form is disabled so you need to select the **Lamp** icon located to the right of the submission form to enable it.

All Pages <input type="text" value="Search..."/> Search Show All <span>★ Add New Submission Form</span>			
Title	Has Success Story	Has White Paper	Actions
Contact Us			    
Contact Us (copy)			    

## Viewing Submissions

1. Select the **Papers** icon located to the right of the submission form to view all the submissions made by your website users using this submission form.

All Pages <input type="text" value="Search..."/> Search Show All <span>★ Add New Submission Form</span>			
Title	Has Success Story	Has White Paper	Actions
Contact Us			    