


Create a New Form

You can create a new form from scratch, or update a pre-existing form template, included in Extend to give you headstart.

1. Point to **Site** and click **Form Manager**.
2. Under **Actions**, click **Create New Form**.
3. Enter a **Title** for the form and the **E-mail** address to which the customer's entries will be sent.
4. If you want to start with a pre-made form **Template** that you can then customize, select one from the drop-down list.
5. Enter **Instructions**, if any, that you feel are needed to explain the form to your users.
6. If you are using a template edit the default rows to suit your needs. If you don't want to use a row, click .
7. For each new field you want to add, click **Add Form Field** to insert a new row.
8. Consult the form field types list below for more information on the fields available.

Form Field Types	Function
Text Label	Labels can be used to group questions into categories. For example, in a form that asks for a person's address and phone numbers, you could create a label named "Address". Then click Add Form Field, move the new row underneath the Address label and call it "Line 1". Repeat for the Line 2, City, State, and ZIP fields. A similar solution could give you a "Phone" label with fields beneath for Home Phone, Work Phone, Fax, and Cell Phone fields.
Text Box (single line)	In the Label field, enter the question you want answered, for example, "How long have you lived in the area?" The form will automatically provide an empty field in which an individual can enter an answer. If you select Required , the individual will not be able to submit the form until answering this question.
Text Box (multiple lines)	Enter the question you want answered in the Label field. For example, Enter any additional comments below. The individual can then enter a desired response. To make entering a response mandatory to successfully submit the form, select Required .
Check Box	Enter the text for the check box in the Label field. A check mark displays in the check box when it is selected. An example of a check box form field would be, Do you want us to contact you? If the check box is selected, the individual is indicating you may contact them. If the check box is not selected, the individual is indicating you cannot contact them. To make entering a response mandatory to successfully submit the form, select Required .
Drop Down List	Enter the question you want answered in the Label field. For example, How would you like us to contact you? Enter the available options for the drop-down list in the Options field; separate options with a semi-colon. For example, Phone;E-mail;Mail;Home Visit. To make responding mandatory to successfully submit the form, select Required .
Radio Buttons	Enter the question you want answered in the Label field. For example, How did you find out about us? Enter the available options for the radio buttons in the Options field; separate options with a semi-colon. For example, Web site;E-mail;Friend;Other. To make selecting an option mandatory to successfully submit the form, select Required .
Name (first, last)	Inserts First Name and Last Name fields in the form. To make entering a first and last name mandatory to successfully submit the form, select Required .
Name (first, middle, last)	Inserts First Name, Middle, and Last Name fields in the form. To make entering a first, middle and last name mandatory to successfully submit the form, select Required .
Email Address	Inserts an E-mail Address field in the form. To make entering an e-mail address mandatory to successfully submit the form, select Required .
Date	Enter the specific type of date you want to gather information for. For example, Birth Date, Anniversary, First Date of Attendance. To make entering a date mandatory to successfully submit the form, select Required .
Address	Inserts an Address field in the form. To make entering an address mandatory to successfully submit the form, select Required .
Phone Number	Inserts a Phone Number field in the form. To make entering a phone number mandatory to successfully submit the form, select Required .