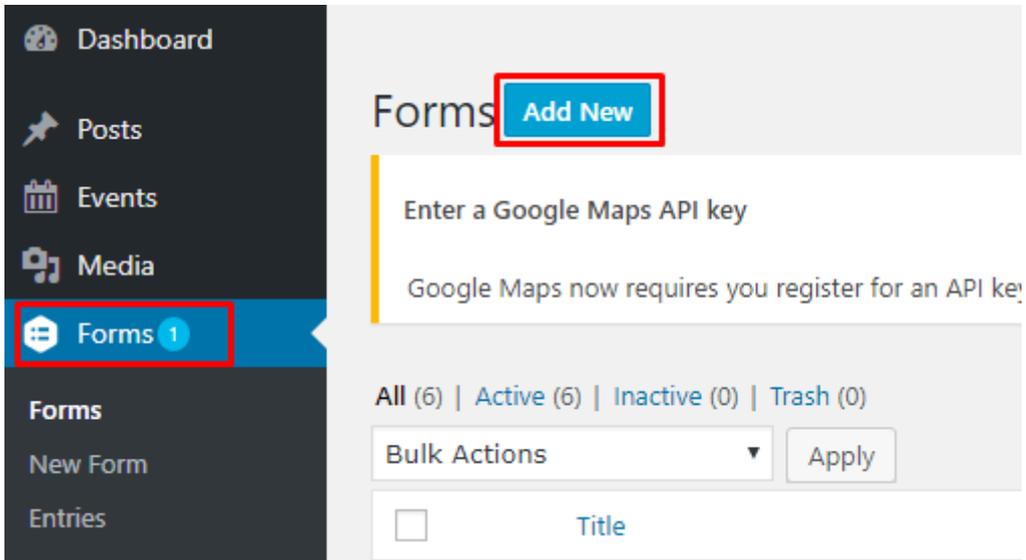
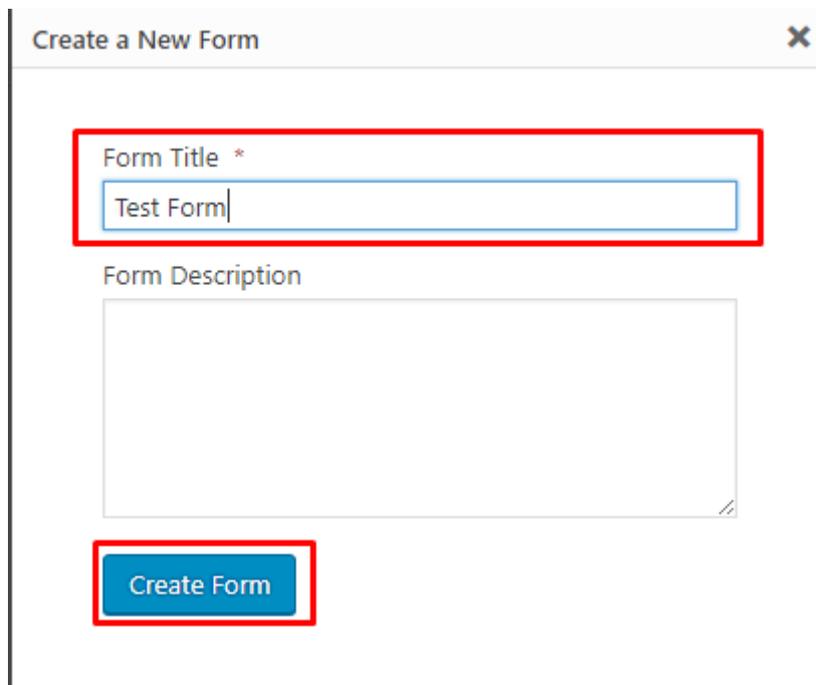


Creating Forms

Step 1 – In the WordPress manage content area click on “Forms” then “Add New”



Step 2 – Enter the form title and then press “Create Form”



The screenshot shows the 'Create a New Form' modal window. The 'Form Title' field is highlighted with a red box and contains the text 'Test Form'. Below it is the 'Form Description' field, which is empty. At the bottom, the 'Create Form' button is highlighted with a red box.

Step 3 – Gravity forms has some default steps for new forms so these are a good place to start

This form doesn't have any fields yet. Follow the steps below to get started.

1. Select A Field Type

Start by selecting a field type from the nifty floating panels on the right.

*Start Over There
Pick a field. any field.
Don't be shy.*

Standard Fields

- Single Line Text
- Paragraph Text
- Drop Down
- Multi Select
- Number
- Checkboxes
- Radio Buttons
- Hidden
- HTML
- Section Break
- Page Break

Advanced Fields

Post Fields

Pricing Fields

Move to Trash

Update Form

2. Click to Add A Field

Once you've found the field type you want, click to add it to the form editor here on the left side of your screen.

Now your new field magically appears over here.

Single Line Text : Field ID 8

Untitled

Alternatively, with step 2 on the default guide you can also instead of clicking the fields on the right-hand side you can drag the fields into the position you would like.

3. Edit Field Options

Click on the edit link to configure the various field options

Preview your changes up here.

Edit the field options. Go ahead.. go crazy.

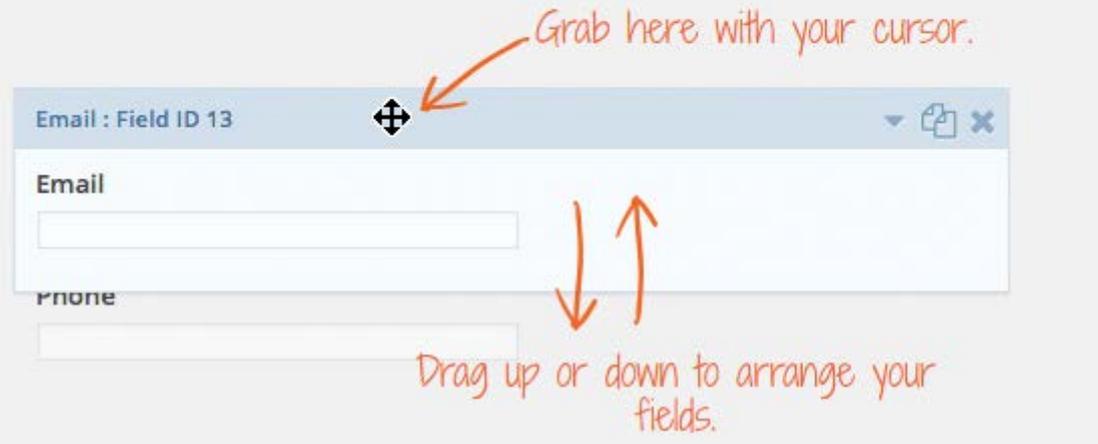
If you get stuck, mouseover the tool tips for a little help.

The main fields you will most likely end up dealing with are highlighted with the red boxes. The field label is what will display above the input. "Required" will put an asterisk "*" above the field you inserted and won't let people submit the form without completing this field. As opposed to the default guide I would recommend using the advanced "Name" field for name entry.

Name	Date
Time	Phone
Address	Website
Email	File Upload
CAPTCHA	List

4. Drag to Arrange Fields

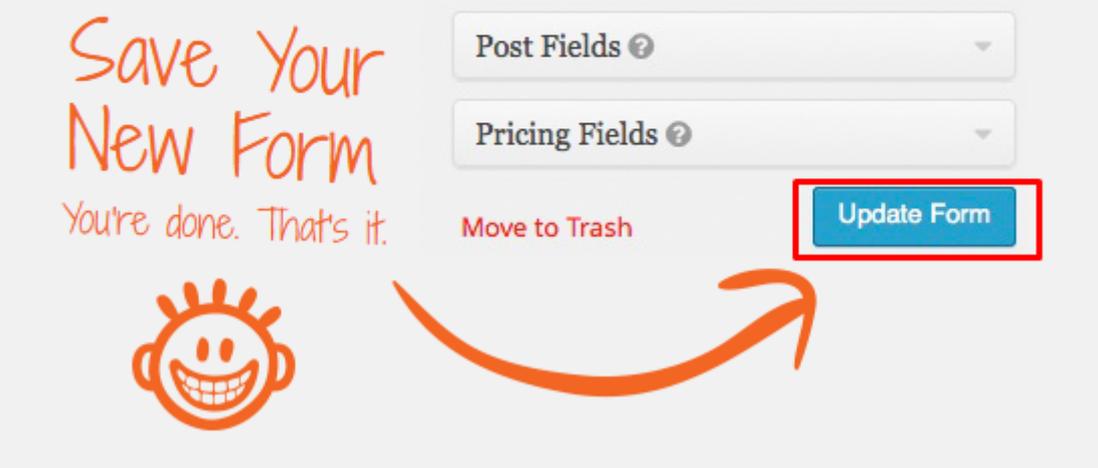
Drag the fields to arrange them the way you prefer



This section is pretty straightforward and does exactly as the screenshot displays.

5. Save Your Form

Once you're happy with your form, remember to click on the 'update form' button to save all your hard work.



As this last default guide displays make sure to "Update" your form which saves what you have done so far. You can always edit this form afterwards if needed.

Step 4 – Basic Guide for common fields you should encounter

Generally we recommend clubs to use fields mainly from the **Standard** and **Advanced** field types and if the form is intended to be complicated or require things that you are unsure of how to implement or use in the form please contact: support@miclub.com.au

Advanced Field -> Name

The screenshot displays the configuration for an 'Advanced Field' named 'Name'. At the top, there are two input boxes for 'First Name' and 'Surname'. Below these are three tabs: 'General', 'Appearance', and 'Advanced'. The 'Advanced' tab is active and contains several sections:

- Field Label**: A text input field containing 'Name'.
- Description**: A large empty text area.
- Name Fields**: A table with two columns: 'Show Field' and 'Custom Sub-Label'.

Show Field	Custom Sub-Label
<input type="checkbox"/> Prefix	Prefix
<input checked="" type="checkbox"/> First Name	First Name
<input type="checkbox"/> Middle	Middle
<input checked="" type="checkbox"/> Surname	Surname
<input type="checkbox"/> Suffix	Suffix
- Rules**: A section with a checked checkbox for 'Required'.

It is generally fine to leave the “Field Label” as “Name”. Next Select which fields you would like to display. By default, First and Last name is displayed and generally will be all you require but other options are available. Lastly “Name” fields should be required to ensure people fill it in.

Name : Field ID 1

Name *

First Name

First Name Surname

General Appearance Advanced

Placeholders

Field	Placeholder
Prefix	
First Name	First Name
Middle	
Surname	
Suffix	

Description Placement

Use Form Setting (Below inputs)

Sub-Label Placement

Use Form Setting (Below inputs)

Custom Validation Message

Custom CSS Class

Looking at the appearance tab, placeholders will be the main area you would have to look at in this case for most fields. Placeholders will display the grey text which can be seen in the “First Name” input box in the screenshot above. This placeholder will disappear when a user clicks on the field to enter a value.

Advanced Field -> Phone

Phone : Field ID 3

Phone

General Appearance Advanced

Field Label

Phone

Description

Phone Format

(###) ###-####

Rules

Required

No Duplicates

Any issue that occur with Phone are generally to do with number entry. The default format shown in the screenshot will limit the numbers to fit in how many hash tags are there. To avoid this you can use a Standard -> Number field or you can change the format to “International”.

Advanced -> Email

The image shows a configuration panel titled "Advanced Fields" with a dropdown arrow. It contains several buttons for different field types: Name, Date, Time, Phone, Address, Website, Email, File Upload, CAPTCHA, and List. The "Email" button is highlighted with a red rectangular border.

This field is generally useful for setting up submission responses. Ultimately it comes down to the purpose of the form you intend to create to what fields you use.

Standard -> Drop Down

The image shows a configuration panel for "Enquiry Area of Interest". At the top, there is a dropdown menu with "Golf" selected. Below this are three tabs: "General", "Appearance", and "Advanced". The "Advanced" tab is active. Under "Field Label", there is a text input field containing "Enquiry Area of Interest". Under "Description", there is a larger text area. The "Choices" section is highlighted with a red rectangle and contains three radio button options: "Golf" (selected), "Functions", and "Other". Each option has a plus/minus icon to its right. Below the choices is a button labeled "Bulk Add / Predefined Choices". At the bottom, there are two checkboxes under "Rules": "Required" and "No Duplicates", both of which are currently unchecked.

This field allows for a drop-down box which a user can select a singular option. A key area here is that you can use this with other fields using "Conditional Logic." This is found under the **Advanced** tab and you can enable it if you want a particular field to only appear if they have selected an option in a previous field.

Checkboxes : Field ID 6

Golf Options

Lessons

Bookings

General

Other

General Appearance **Advanced**

Admin Field Label ?

Visibility ?

Visible Hidden Administrative

Allow field to be populated dynamically ?

Enable Conditional Logic ?

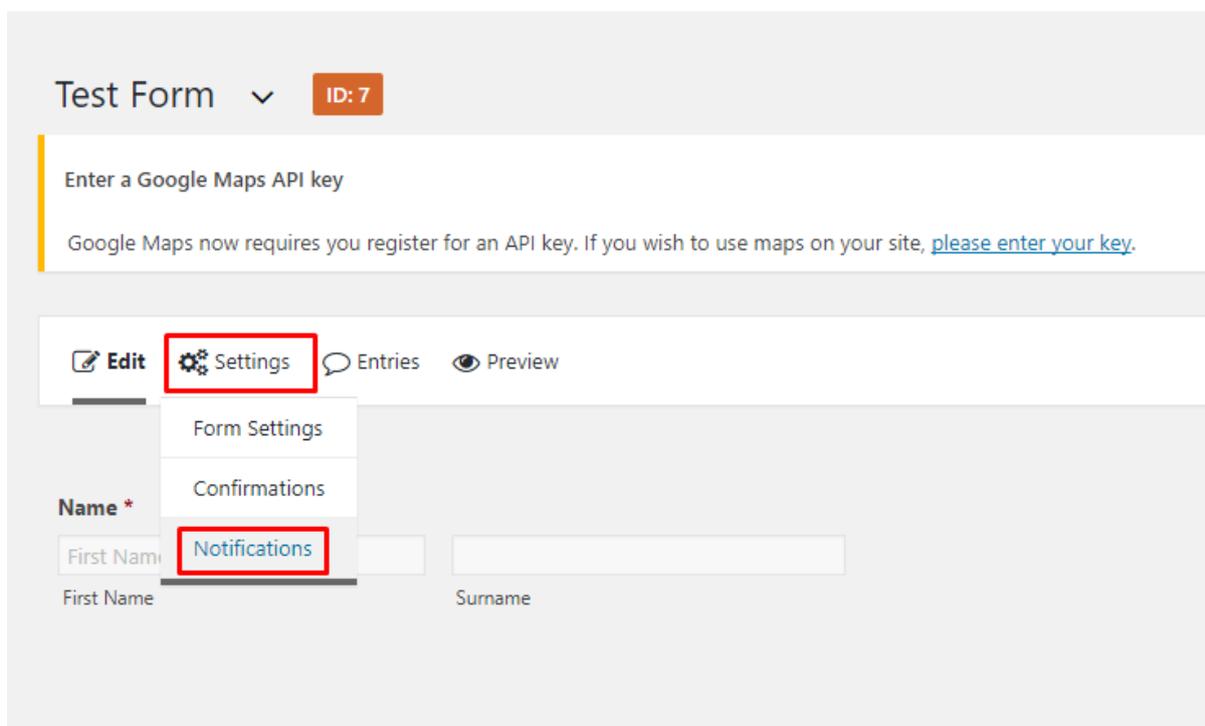
Show ▾ this field if All ▾ of the following match:

1 is ▾ **2** ⊕

Using the “Drop Down” Screenshot we have now set up a Checkbox field (please note this can be any sort of field) and have gone to the advanced tab and enabled conditional logic. We have then set the first field to “Show” (default) and the second to “All” (default). The field marked by the red “1” is the field that you want to use to determine the visibility of this field. The field marked by the red “2” is the option selected from the field displayed in “1”.

For example, we have set up a drop box asking for enquiry type. If the option “Golf” is selected for the area of interest then a new **Checkbox** field appears where users can select different options a user can pick which are more specific to “Golf”.

Step 5 – Setting up email notifications for submissions



Test Form ▼ ID: 7

Enter a Google Maps API key

Google Maps now requires you register for an API key. If you wish to use maps on your site, [please enter your key](#).

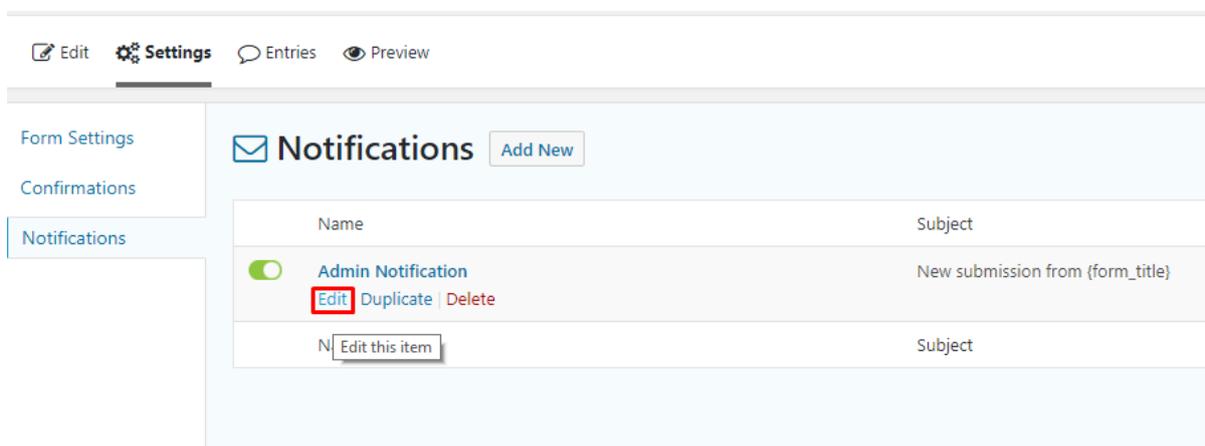
[Edit](#) **Settings** [Entries](#) [Preview](#)

- Form Settings
- Confirmations
- Notifications**

Name *

First Name Surname

When looking at the form you are trying to adjust the notifications for click on “Settings” or hover over it and a drop-down menu will appear. Next click on “Notifications”.



[Edit](#) **Settings** [Entries](#) [Preview](#)

Form Settings

Confirmations

Notifications

Notifications [Add New](#)

Name	Subject
<input checked="" type="checkbox"/> Admin Notification Edit Duplicate Delete	New submission from {form_title}
<input type="checkbox"/> Edit this item	Subject

Click “Edit” for the Admin Notification.

The image shows a configuration form for an email notification. The fields are as follows:

- Name:** Admin Notification
- Send To * ?**: Enter Email Select a Field Configure Routing ?
- Send to Email:** {admin_email} (highlighted with a red box)
- From Name ?**: [Empty field with a drop-down arrow icon highlighted by a thicker red square]
- From Email ?**: {admin_email} (highlighted with a red box)
- Reply To ?**: [Empty field]
- BCC ?**: [Empty field]

A bunch of fields will appear, but the ones highlighted in red will be the main area to look at.

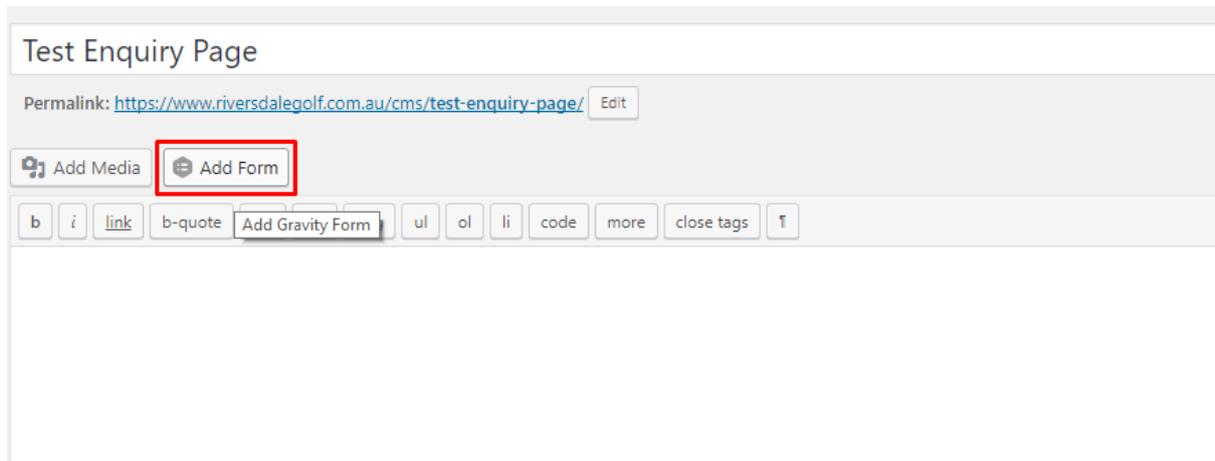
The 'Send to Email' is where the submission will be shown. Generally, you want this going to a club email or the email of whoever is in charge of that form (Example: admin@clubName.com.au).

The 'From Name' is generally who the submission is made by so you will want to click the little drop down highlighted by the thicker red square on the right of the field and select the "Name (First Name)" option and then do it again and select the "Name (Surname)" option.

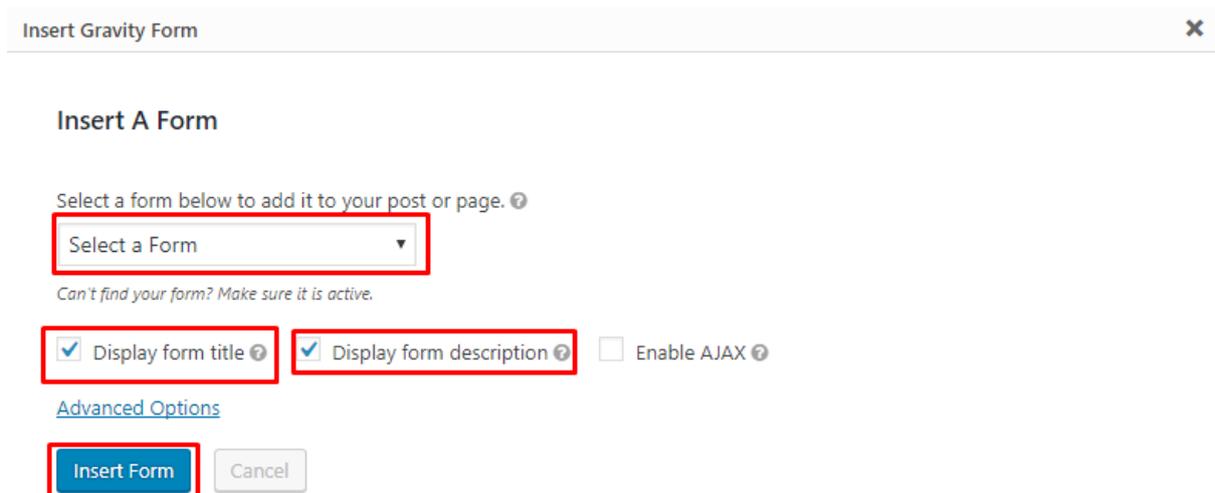
The "From Email" field you should click the drop down similar to the "From Name" and select the email field. For email to show in this drop down it must be set as required on the form.

Lastly the 'Reply To' field is generally left blank and is recommended by MiClub to do so as entering an invalid email or certain patterns can cause submission notifications to be lost.

Step 6 – Adding a form to a page



Go to the page in which you wish to add a form and click on the “Add Form” button in the editing area and a pop up should appear.



This first thing you will want to do is select the form from the drop-down menu that you wish to add to the page you are editing. Next will be select the checkboxes you wish to display (generally most untick both title and description or leave just the title)

Lastly click “Insert Form” and it will insert some code which determines where the form will show up on the page.

