Forms Guide

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Forms

With *Forms*, you can create and manage online forms to collect information from website users. When you create forms, you use the Form Designer to create distinct steps and sections, insert instructional text and images, and insert fields to collect data from website users. The available field types include text fields, text areas, radio button lists, checkboxes, checkbox lists, dropdown lists, and a special email field that sends confirmation email messages to users who enter email addresses. These fields on the Common form type do not map to a database outside the program.

After you design a form, you use a Form Display part to create a landing page on the website. In *Parts*, you create a Form Display part and select the forms to include on the web page. On the website, users view the available forms, and they can click links to start, resume, delete, or print the forms.

Warning: To avoid security issues, do not use an iFrame from a third party website to direct users to this part on a web page. We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the page.

After you place forms on your website, you manage them in *Forms*. With the Form Designer, you can adjust the forms as necessary, and on the Data tab, you can view summary information about the forms and manage the data that website users submit. After users start form, you can use the Data tab to create PDFs with their data and delete form entries.

Online Forms: Process Overview

To create online forms and place them on your website, you must perform several steps in different areas of the program. For Common forms, the fields do not map to another database and the data that website users submit remains in the program.

Step 1

To allow users to create and manage online forms, you must provide security rights. To do this, you add the desired form-related rights to a task group. In *Security Assignments*, you then associate the task group with a role or an individual user. In the task group, you can provide users with full supervisor rights in *Forms*, rights to create forms but not edit or delete other users' forms, view-only rights, or limited view-only rights for the form data that website users submit. For more information about security rights, see the *Users & Security Guide*.

Step 2

To create an online form, go to *Forms* and click **New form**. If you do not want to create a form from scratch, you can copy an existing form, create a form based on a sample in the Samples tab, or import an XML form. When you create the form, enter a name and select a form type to determine the available elements. The Common form type is available to all users and includes presentation elements and field elements that are available on all forms. The data you collect with Common forms does not map to another database.

Tip: When you host multiple sites, you can create forms for individual sites. To do this, log in to the site and create the form. For more information, see the *Administration Guide*.

Step 3

After you create a form, use the Form Designer's Form builder tab to select the elements to include. To place elements on the form, select them under **Available elements** and drag and drop them to **Selected elements**. To edit properties for an element, place the cursor over the element and click **Edit**. With presentation elements, you can organize the form into steps and sections and add images and instructional text. Each form must include at least one step and one section. With field elements, you can place fields on the form to collect data. Common fields available on all forms include text fields, text areas, radio button lists, checkboxes, checkbox lists, dropdown lists, and a special email field that sends confirmation email messages to the email addresses that users enter.

Step 4

After you design the form on the Form builder tab, use the Form Designer's other tabs to enter settings for the form. For information about the Form Designer, see Design Forms on page 6.

- On the Language tab, you can rename labels, headings, and other text for the form.
- On the Properties tab, you can change the form name and description. You can also suspend the form to allow website users to view their statuses but not start or submit forms.
- On the Targeting & security tab, you set the view rights to target the form to specific users.
- On the Login tab, select whether to require users to log in to access the form. You can also select whether to allow users to save and delete forms, and whether to create sign-up transactions in The Raiser's Edge for users who register for your site through the form.

- On the Payment tab, select whether to charge a fee when users submit the form.

- On the Submit settings tab, select whether to use the default confirmation screen when users submit forms or to design your own. Click **Acknowledgement email** to design the email message to send to users to confirm receipt of their form data.

Tip: In the form, the email address field is used to send the acknowledgement only if the user is not logged in. If the user is logged in, the acknowledgment email is sent to the email address associated with the login profile account.

Step 5

After you complete the form, you can place it on your website. To do this, you create a Form Display part in *Parts* and select the forms to include on the part. When you place the part on a web page, it acts as a landing page for users to access your online forms. On this page, a list of available forms appears, and after website users start forms, they can view the statuses and resume, delete, and print forms. On the Form Display part, you also enter login settings for users who access the page. For more information about the Form Display part, see the *Parts Guide*.

Step 6

After you place the Form Display part on the website, you return to *Forms* to manage forms. On the Data tab, you can view summary information about forms and manage the data that website users submit. On the Summary tab, the grid displays the number of forms started and completed for each form on the website. On the Detail tab, you can edit the data that website users enter on the forms. For more information about the Data tab, see Manage Data from Online Forms on page 15.

Design Forms

When you create online forms for your website, you use the Form Designer to include presentation elements and field elements. Presentation elements include steps, sections, images, and text. Forms are organized into steps and sections, and each form requires at least one step and section before you can add other elements. Field elements include text fields, text areas, radio button lists, checkboxes, checkbox lists, dropdown lists, and a special email field that sends confirmation email messages to the email addresses that users enter. These fields do not map to a database outside of the program. When you add multiple steps to a form, website users page through the form from one step to the next. If you charge a fee for users to submit the form, the payment information appears as an additional step.

After you complete a form, you use a Form Display part to place it on the website. On the web page with the part, website users can access all forms that you include on the part. From the web page, users can start forms, view their statuses, and resume, delete, and print forms.

For more information about the Form Display part, see the *Parts Guide*.

After you place the Form Display part on the website, you return to *Forms* to manage your forms. You can use the Form Designer to adjust the forms as necessary, and on the Data tab, you can view summary information about the forms and manage the data that website users submit. On this tab, you can view overall statistics for each form and access the data that website users enter on the forms. You can also create PDFs with user data.

For more information about the Data tab, see Manage Data from Online Forms on page 15.

> Create a form

1. From *Site explorer*, click **Forms**. *Forms* appears.
2. Click **New form**. The Form Designer appears.

   If you do not want to create a form from scratch, you can copy a form or use a sample as a starting point.

   - To copy a form, locate it in the *Forms* gallery and click **Click here to copy this form**. On the Copy Form screen, enter a name, select a folder, and click **Next**. The Form Designer appears, and you can edit the form as necessary.

   - To copy a sample form, locate it on the Samples tab and click **Click here to copy this sample**. On the screen that appears, enter a name, select a folder, and click **Next**. The Form Designer appears, and you can edit the form as necessary. For information about samples, see Sample Forms on page 15.

   - If you previously exported a form or sample in Blackbaud NetCommunity, you can import the XML to create a copy of the form. To create the XML, you click s**Click here to export this form** or **Click here to export this sample** in the *Forms* gallery. To import the XML, you click **Import form**. On the Import Form screen, enter a name, select a folder, and paste the XML in the **Form XML** field. Click **Next**. The Form Designer appears, and you can edit the form as necessary.

Warning: You must copy and paste the XML from *Notepad* or another text editor. If you copy the XML directly from an XML editor or web browser, the Form Designer cannot create the form.

3. In the **Form type** field, select the form type. The form type determines the elements that are available for the form.

   • The Common form type only includes presentation elements and field elements that are available on all forms. Fields on a Common form do not map to another database.

4. In the **Form name** and **Form description** fields, enter a name and description for the form.

5. In the **Folder** field, select a folder to store the form. By default, the program uses the **Forms** root folder.

6. To prevent website users to start or submit the form, select **Suspend form**. This allows website users to view the statuses of their forms but not start forms or submit data. You can use this checkbox to enforce submission deadlines and still allow users to monitor their statuses online.

7. To design the form, click **Next**. The Form builder tab appears.
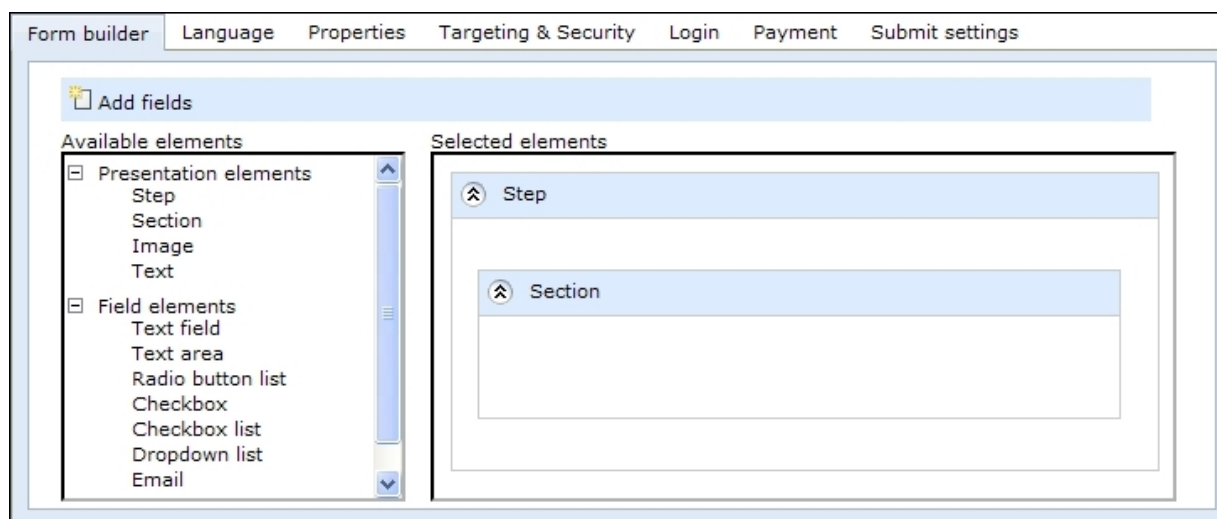
8. Under **Available elements**, the Form Designer displays the Common presentation elements and field elements that are available for all forms. To design the form, click and drag elements from **Available elements** to **Selected elements**. Under **Selected elements**, click and drag items to arrange the order for the website.

   • Under **Presentation elements**, select items to organize the form. With steps, you create distinct portions of the form for users to page through. With sections, you group elements within each step. Each form requires at least one step, and each step requires at least one section because you cannot place other elements directly on steps. You can also add images and text as necessary.

   • Under **Field elements**, select fields to collect data from website users. The Common field elements include the text field, text area, radio button list, checkbox, checkbox list, dropdown list, and a special email field that sends confirmation email messages to the email addresses that users enter. These fields do not map to a database outside of the program.

Note: To edit element properties such as labels, style sheets, and validators, place the cursor over an element in **Selected elements** and click **Edit**. An element properties screen appears. For information about properties of presentation elements and field elements, see Properties of Form Elements on page 19.

9. To rename the labels, headings, and other text that appears on the form, select the Language tab. For information about the Language tab, see the *Website Design Guide*.

10. To assign website security rights for users and roles, select the Targeting & Security tab. For information about the Targeting & Security tab, see the *Website Design Guide*.

11. To select login settings for the form, go to the Login tab.

12. To require website users to log in to access the form, select **Require login**. Additional login options appear.

   • To allow website users to save their data on a form and return to it later, select **Allow user to save form**.

   • To allow website users to delete a form and not submit it, select **Allow user to delete a form in progress**.

   • To create constituent records in The Raiser's Edge for any users who register for your website through this form, select **Create Raiser's Edge sign-up transactions**. You enter user login settings for the form on the Form Display part.

Note: For Common forms, **Create Raiser's Edge sign-up transactions** is always selected when you require users to log in to access the form.

   • To restrict users to submit a form only one time when they are logged in to your site, select **Allow only one form submission**.

13. To charge a fee when users submit the form, select the Payment tab and select **Charge fee with form**. Additional payment options appear.

14. Under Fee amounts, to add a fee amount, click **Add form fee**. The Fee amounts screen appears.

   a. Enter a name for the form fee.

   b. Enter the dollar amount for the form fee.

   c. In the **Criteria** field, select if the form fee applies to everyone or based on how a website user answers a field on the form.

   d. If you select Based on fields in the form, click **Add a new rule**. The New Rule screen appears.

   e. Select the step, section, field, and response, that if they choose on the form, the fee is added to the total form fee amount. For example, if a website user answers yes to participation in a club activity, you can charge a conditional fee on only club participants.

   f. Click **Save**.You return to the Fee amounts screen.

   g. Click **Save** again. You return to the Form Designer screen. Add as many separate form fees as you need.

15. Under Payment setup, select to use a Payment 2.0 part or to proceed directly to payment with your merchant account.

16. If you select to use a payment part, select the payment page and then write an acknowledgement message.

Note: If you select to use the payment part, you first need to set up your payment and merchant information in the Payment 2.0 part before you select it in the form.

17. If you select to use your merchant account, in the **Merchant account** field, select a merchant account such as your organization's IATS account to process credit card transactions received through the form.

    a. The system supervisor sets up merchant accounts in *Administration*. For more information, see the *Administration Guide*.

    b. To display CAPTCHA text for users to enter before they proceed with the payment, select **Display reCAPTCHA**.

    c. CAPTCHA is an automated public turing test to tell computers and humans apart to help prevent automated abuse of your website. You enable *reCAPTCHA* in *Administration*. For more information, see the *Administration Guide*.

18. Select the payment methods available to users. Credit cards are allowed by default.

    • To allow users to pay at a later time, select **Bill me later**.

    • To allow users to waive the fee, select **Allow users to waive the fee** and enter a waiver code in the field that appears.

19. To edit settings for when users submit the form, select the Submit settings tab.

20. Under **Confirmation screen**, select whether to use the default screen or create a custom screen.

    • To use the default, select **Use default confirmation screen**.

    • To design the confirmation screen, select **Use custom confirmation screen**. The HTML editor appears. The program's default confirmation screen appears in the HTML editor for you to customize according to your needs.

    Edit the content for the confirmation screen. To format the appearance and layout, use the HTML editor toolbar. To include personalized information, use merge fields. For more information, see the *Program Basics Guide*.

> *Warning:* If you customize the confirmation screen and then select **Use default confirmation screen**, your changes to the confirmation screen remain. To remove changes, select **Use custom confirmation screen** and click **Restore default content**.

21. Under **Email alert**, select **Send an email alert when a user submits a form** to send an email to staff members when a website user submits a form.

22. Under **Recipients**, to send the alert to individual users and users in a role, click **Add users and roles**. The Select users and roles screen appears.

a. In the **Filter** field, enter the first letter of the user or role to include.

Note: The **Available** box displays 30 users and roles in alphabetical order. Use the **Filter** field to find additional users and roles that do not appear in the box.

b. Locate the user or role, and click **Add**. The user appears in the **Selected** box.

    To select multiple users or roles, press **SHIFT** while you select the multiple users, and then click **Add all**. The users appear in the **Selected** box.

c. Click **OK**. You return to the Submit settings tab. The users and roles appear in the **Users and roles** box.

23. To send the notification to a staff member who does not have a Blackbaud NetCommunity account, enter an email address under **Email addresses**.

Note: You can select to send the notification to individual users and users in roles instead of, or in addition to, individuals who do not have a Blackbaud NetCommunity account. When you enter multiple email addresses, separate them by a comma or semicolon.

24. Enter a subject in the **Subject** field and an email address in the **From** field for the email alert.

25. To display form data in the body of the email alert, select **Include form data in the email alert**. By default, the email links to a PDF version of the form, and when you select this option, the email also includes form data.

26. To create an acknowledgement email for website users who submit forms, click **Acknowledgement email**. The Acknowledgement Email screen appears.

27. Enter a name for the acknowledgment, a subject, a return address, and a name for the **From** field of the email message.

Tip: In the form, the email address field is used to send the acknowledgement only if the user is not logged in. If the user is logged in, the acknowledgment email is sent to the email address associated with the login profile account.

28. In the box, edit the content of the acknowledgment. To format the appearance and layout, use the HTML editor toolbar. For information about how to design an email acknowledgment, see the *Email Guide*.

29. Click **Save** to save your progress and continue to set up the form. You can also click **Save and Close** to return to *Forms*.

    To post the form on your website, place it on a Form Display part. For information about the part, see the *Parts Guide*.
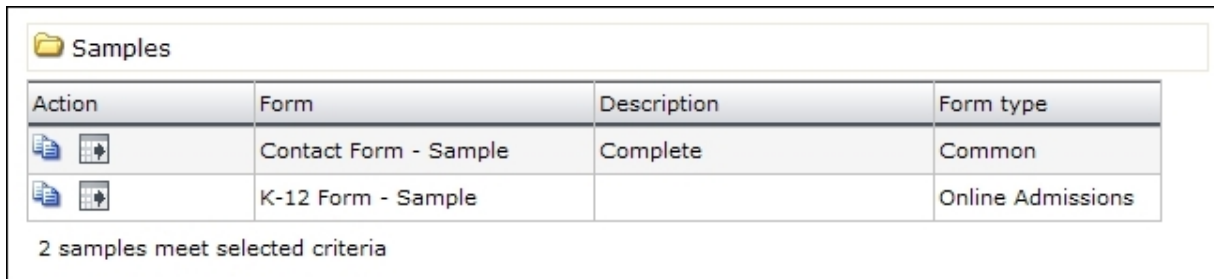
    After you place the form on the website, you can view summary information about the form and manage the data that website users submit on the Data tab in *Forms*. For information about the Data tab, see .

Sample Forms

In *Forms*, the Samples tab provides sample forms to use as a starting point for new forms. You cannot edit the samples or place them directly on your website through a Form Display part. However, they are useful to save time when you create forms. You can copy a sample form that is similar to the form you want and edit it as necessary.

> ### Copy a sample form to design a new form

1. From *Site explorer*, click **Forms**. *Forms* appears.

2. Select the Samples tab. The gallery displays the available samples.

3. To create a form based on a sample, select it and click **Click here to copy this sample**. The Copy Form screen appears.

4. Enter a name, select a folder for the new form, and click **Next**. The Form Designer appears, and you can edit the form as necessary. For information about how to design a form, see Design Forms on page 6.

Note: You can also create an XML version of a sample form and use the XML to create a form. To generate the XML, select the sample and click **Click here to export this sample**. To create a form based on the XML, click **Import form**. On the screen that appears, enter a name, select a folder, and paste the XML from *Notepad* or another text editor into the **Form XML** field. Click **Next**. On the Form Designer, you can edit the new form as necessary.

5. Click **Save**. You return to *Forms*.

   To post the form on your website, place it on a Form Display part. For information about the part, see the *Parts Guide*.

   After you place the form on the website, you can view summary information about the form and manage the data that website users submit on the Data tab. For information about the Data tab, see Manage Data from Online Forms on page 15.

Manage Data from Online Forms

After you place forms on your website, you can go to *Forms* to manage the data that website users submit. On the Data tab, you can view summary information about the forms, and after users start

forms, you can manage their data.

On the Summary tab, the grid displays the number of forms started and completed for each form on the website. On the Detail tab, you can edit the data that website users enter on the forms. You can also delete, export , and print entries. On the Export & Print tab, you can filter your forms to export a group of form data to a .csv file or print the data. On the Payments tab, you can review and export the payment information for each submitted form.

❯ Manage data that website users submit in online forms

1. From *Site explorer*, click **Forms**. *Forms* appears.

2. To view information about the forms on your website and manage the data that website users enter on the forms, select the Data tab.

3. On the Detail tab, entries appear for the data that website users enter. To filter the entries, enter your search criteria and click **Search**. Entries that match your criteria appear.

   - To search a particular site, enter the site in the **Forms created on** field.

   - To search for data from a particular form, select it in the **Form** field.

   - To search for data from a particular form type, select it in the **Type** field.

   - To filter data according to whether users started or completed the form, use the **Status** field.

   - To filter data according to when users completed the form, enter a start date in the **Date completed** field and an end date in the **To** field.

   Note: The **Date completed** and **To** fields are disabled when you select "All" or "Started" in the **Status** field because you cannot search for forms that were started during a period of time.

   - To filter data according to whether you created PDFs, use the **Print status** field.

4. On the Summary tab, statistics appear for all forms on the website. The list includes the number of times website users started and submitted each form on your website.

5. On the Export & Print tab, you select the criteria to filter forms for print or export. For more information, see Export or Print Form Data on page 17.

6. On the Payments tab, you can review the payment status for a form and export the payment information to a .csv file. For more information, see Form Payments on page 18.

7. To manage the data that website users submit, select the Detail tab. Entries that match the search criteria on the Data tab appear.

   - To view a form's data, click a user name under **Name**. An HTML version of the form appears in a separate window. You can use this HTML as a preview before you perform any actions.

   - To create a PDF with user data, select the checkboxes for the data to include and click **Print**. The PDF appears in a separate window. You can save or print the PDF for your records.

   - To create a comma-separated-values file with user data, select the checkboxes for the data to include and click **Export**. The program creates a .csv file that you can edit in Microsoft *Excel*.

   Note: You cannot create a .csv file with data from multiple forms. All the entries you select must include data from the same form.

- To delete entries, select the checkboxes and click **Delete**. For example, you may want to delete entries after you process the data.

8. As website users create and submit forms, the program updates the Data tab. To manage the data from your online forms, you will need to monitor the Data tab.

Export or Print Form Data

On the Export & Print tab, you select criteria to determine which forms you want to print or export from *Forms*. If you select to export form data, you can save or open a .CSV file. If you select to print form data, a new window opens and your data appears as a .PDF file. You can choose to print the data or save the Adobe *Acrobat* file. To print the data, from the browser window, click **File**, **Print**. Select the name of the printer and your print options, then click **OK**.

To filter the forms for export or print, select your filter criteria:

- To print or export data from one site location in your organization, click the binoculars to search for and select the site in the **Forms created on** field.
- To print or export data from a particular form, select it in the **Form** field.
- To print or export data from a particular form type, select it in the **Type** field.
- To print or export data with a particular form status, select it in the **Status** field.
- To print or export data from a particular date or date range, select it in the **Form completed** field.
- To print or export data based on the print status, select the status in the **Print status** field.

Form Payments

When you manage the data that website users submit in online forms, you can review the payment information on the Payments tab. For each form, you can review the submitted data, a summary of the payment information, and export the payment data to a .CSV file.

- In the **Form Data** grid, for each submitted form, you can review the amount, card type, cardholder name, last 4 digits of the social security, the payment status, payment date, the reference number, and form name.

- To review the submitted form's payment data, in the **Name** column, click the student's name. A new window opens with the submitted form information.

- To export form payment data, select the payments individually or select the checkbox in the top row to select all on the page. A link appears at the top of the page if you want to select all payments on all pages. Click **Export**. A file download screen appears. You can open or save the .CSV file.

Form Data
Detail   Summary   Export & Print   **Payments**

Export

	Name	Amount	Card type	Cardholder name	Last 4 digits	Status	Reviewed	Payment date	Reference n
☐	Rocko Smith	$0.00				Waived	☐	1/19/2012	
☐	Josh Smith	$0.00				Waived	☐	12/21/2011	
☐	Josh Smith	$0.00				Waived	☐	12/21/2011	
☐	John Paul	$0.00				Waived	☐	2/16/2012	
☐	Josh Smith	$0.00				Waived	☐	12/21/2011	
☐	John Paul	$10,160.00	Visa	Ron Paul	1111	Completed	☐	2/16/2012	909XC9
☐	Carl Paul	$10,025.00	Visa	Ron Paul	1111	Completed	☐	2/17/2012	25I060
☐	Josh Smith	$0.00				Waived	☐	1/10/2012	
☐	John Paul	$10,124.99	Visa	Ron Paul	1111	Completed	☐	2/17/2012	25I060
☐	Josh Smith	$10.00				Bill me later	☑	12/6/2011	
☐	Josh Smith	$0.00				Waived	☐	1/13/2012	
☐	Josh Smith	$0.00				Waived	☐	12/21/2011	
☐	Josh Smith	$0.00				Waived	☐	12/21/2011	
☐	John Paul	$0.00				Waived	☐	1/17/2012	
☐	Josh Smith	$0.00				Waived	☐	1/11/2012	
☐	Josh Smith	$0.00				Waived	☐	1/10/2012	
☐	Josh Smith	$0.00				Waived	☐	12/22/2011	
☐	John Paul	$10,759.99	Visa	Ron Paul	1111	Completed	☐	2/15/2012	EFNFRR

99 payments meet selected criteria   1 | 2

Total amount: $87,947.85

Properties of Form Elements

After you place elements on a form in the Form Designer, you can edit the properties for the elements. To design the form, drag and drop items from **Available elements** to **Selected elements**. To edit the properties for an element, place the cursor over the element in **Selected elements** and click **Edit**. An element properties screen appears. After you edit the properties, click **Save**. The tables in this section describe the properties for the Common presentation elements and field elements that are available for all forms.

Step and Section Elements

You use the step and section elements to organize the form. With steps, you create distinct portions on your forms for users to page through. With sections, you group elements within steps. Each form requires at least one step, and each step requires at least one section because you cannot place other elements directly on steps.
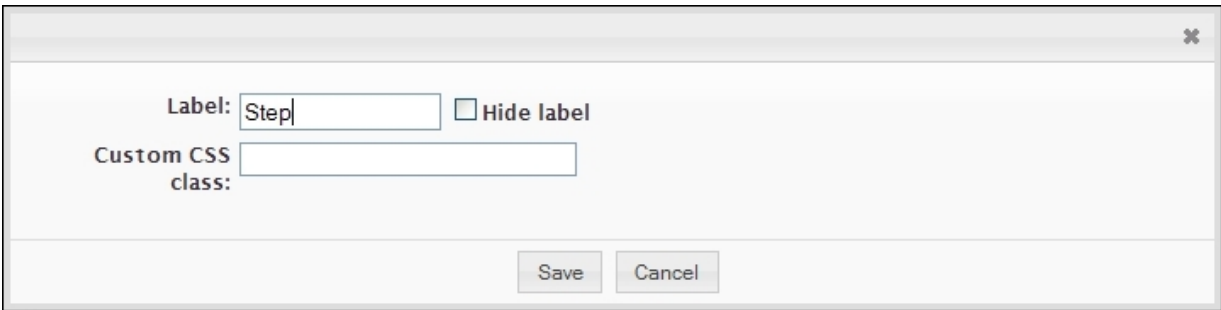
Option	Function
Label	Enter a label for the step or section.
Hide label	If the label is for internal purposes and should not appear on the website, select **Hide label**.
Custom CSS class	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class.
	For information about style sheets, see the *Website Design Guide*.

Image Element

You use the image element to place images from *Image Library* on the form.

Option	Function
Alternative text	Enter text to appear in place of the image if the image is unavailable for any reason.
Custom CSS class	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class.
	For information about style sheets, see the *Website Design Guide*.
Insert image,Remove image	To select an image from *Image Library*, click **Insert image**. The Select Image From Image Library screen appears. The image you select appears under **Preview**. To remove it, click **Remove image**.
	For information about *Image Library*, see the *Website Design Guide*.

Text Element

You use the text element to insert instructional text or additional information on the form. The text is not associated with field elements. You can use it to guide users through the form.

Option	Function
Text	Enter text to appear on the form. The text element displays up to 500 characters and is not associated with a field element. You can use the text to provide step- or section-level instructions.
Custom CSS class	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class. For information about style sheets, see the *Website Design Guide*.

Text Field, Text Area, and Email Elements

With the text field, text area, and email elements, you can place fields on the form for users to enter data. The text field and email elements are standard fields, while the text area element includes additional space for longer responses.

Warning: The email element is a special field that sends confirmation messages to the email addresses that users enter. To collect email addresses but not send confirmation messages, use the text field element.

Option	Function
Label	Enter a label for the field.
Hide label	If the label is for internal purposes and should not appear on the website, select **Hide label**.
Required	To require users to enter a value in the field before they can submit the form, select **Required**.
Required message	If a field is required, enter text to appear beside it when users attempt to submit the form without values in the field.
Hidden	If a field is for internal purposes and should not appear on the website, select **Hidden**. You must enter a value in the **Default value** field.
Inline help	Enter instructional text or additional information about the field. A link beside the field allows users to access the text.
Custom CSS class	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class. For information about style sheets, see the *Website Design Guide*.
Validator	To restrict entries to certain characters or formats, select a validator. For information about the validators, see Validators on page 26.
Validation warning	If you select a validator, a default error message appears in this field. The message appears beside the field when users attempt to submit the form and the field entry does not meet the validator's requirements. You can edit the message as necessary.
Character limit	Enter the maximum number of characters for the field.
Default value	Enter a default value to appear in the field when users start the form.
Include in export	To include the field when you export data that users submit on the form, select **Include in export**. To exclude it when you export, clear the checkbox.

Checkbox Element

With the checkbox element, you can place a standalone checkbox on the form and select whether to select it for users by default.

Option	Function
Label	Enter a label for the checkbox.
Hide label	This option is disabled for the checkbox element.
Required	To require users to select the checkbox before they can submit the form, select **Required**.
Required message	If the checkbox is required, enter text to appear beside it when users attempt to submit the form without selecting it.
Hidden	If the checkbox is for internal purposes and should not appear on the website, select **Hidden**. You must select a value in the **Default value** field.
Inline help	Enter instructional text or additional information about the checkbox. A link beside the checkbox allows users to access the text.
Custom CSS class	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class. For information about style sheets, see the *Website Design Guide*.
Default value	Select "Yes" to select the checkbox by default or "No" to clear it.
Include in export	To include the checkbox when you export data that users submit on the form, select **Include in export**. To exclude it when you export, clear the checkbox.

Radio Button List, Checkbox List, and Dropdown List Elements

With the radio button list, checkbox list, and dropdown list elements, you can place fields on the form for users to select responses. You can enter the options for users to select from, or you can import code table values from The Raiser's Edge.

Option	Function
Label	Enter a label for the list.
Hide label	If the label is for internal purposes and should not appear on the website, select **Hide label**.
Required	To require users to select a value in the list before they can submit the form, select **Required**.
Required message	If the list is required, enter text to appear beside it when users attempt to submit the form without selecting a value in the list.
Hidden	If the list is for internal purposes and should not appear on the website, select **Hidden**. You must select a value in the **Default value** field.
Inline help	Enter instructional text or additional information about the list. A link beside the list allows users to access the text.
Custom CSS class	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class. For information about style sheets, see the *Website Design Guide*.

Option	Function
List values (enter values on separate lines)	In the dropdown list, select whether to create a list or import entries from a code table. To create a list, enter values on separate lines. To import code table entries, select the code table. You can edit the code table entries you import, but your changes do not affect the source code table. ***Warning:*** For checkbox lists, entries cannot include nonaphanumeric characters such as "<," ">," and "&." If you import a code table entry or enter a list item with such characters, no label appears on the form for that entry's checkbox.
List default value	Enter a value to select by default in this list when users start the form.
Allow other	To allow users to enter values not in the list, select **Allow other**. When users select "Other," a field appears on the form for these values.
Other field character limit	If you allow users to enter their own values, enter the maximum number of characters for the field.
Include in export	To include the list when you export data that users submit on the form, select **Include in export**. To exclude it when you export, clear the checkbox.

File Attachment Element

With the file attachment element, you can place a file attachment upload field on the form for users to upload documents to the form. For each file attachment element, you choose which Documents part to use for file attachment settings. Uploaded documents appear in *Forms* on the Data tab.

Option	Function
Label	Enter a label for the field.
Hide label	If the label is for internal purposes and should not appear on the website, select **Hide label**.
Required	To require users to select a value in the field before they can submit the form, select **Required**.
Required message	If the field is required, enter text to appear beside it when users attempt to submit the form without selecting a value in the field.
Inline help	Enter instructional text or additional information about the field. A link beside the field allows users to access the text.
Custom CSS class	To override the default Cascading Style Sheet (CSS) format of the page where the form appears, enter a custom CSS class. For information about style sheets, see the *Website Design Guide*.
Select document part	To upload files, the file attachment element uses the Document part to determine how files upload. Search for and select a document part to use. You can set up Document parts for each file attachment element used on a form, or create one Document part for all your file attachment needs. For information about the Document part, see the *Parts Guide*.
Max file size	This field displays the maximum file size allowed for document uploads. To edit the maximum file size, you need to edit the setting on the Document part.
Allowed file types	This field displays the MIME file types allowed for document uploads. To edit the MIME file types, you need to edit the settings on the Document part.
Default file name	Enter a default name for file uploads. If you do not enter a default file name, the file name as uploaded by the user defaults.
Prefix form name	To prefix your file name with the name of the form, select the checkbox. When a user uploads a file, the name will be <form name> - <default file name>

Validators

After you add text field, text area, and email elements to forms, you can edit the properties to include validators. Several standard validators are available to ensure that user responses meet your criteria. The following table describes the restrictions that the standard validators enforce, as well as the default error messages that appear when users attempt to save data that does not meet the validator criteria.

Validator	Allows	Default Error Message
Alpha	Upper and lower case letters.	Please enter letters only.

Validator	Allows	Default Error Message
Alphanumeric with spaces	Upper and lower case letters, numbers, and spaces.	Please enter letters, numbers, and spaces only.
Alphanumeric without spaces	Upper and lower case letters and numbers.	Please enter letters and numbers only.
Email	Email addresses with the format youraddress@yourdomain.	Please enter a valid email address with the format youraddress@yourdomain.
Numeric	Numbers (just a string of digits).	Please enter numbers only.
Numeric with decimals	Numbers (just a string of digits) and a decimal.	Please enter numbers and a decimal only.
Social Security number	Numbers and hyphens with the format ###-##-####.	Please enter a valid Social Security number with the format ###-##-####.
U.S. date	Legitimate date with the MM/DD/YYYY format. Months can take one or two digits, from 1 to 12 or 01 to 12. Days can take one or two digits, from 1 to 31 or 01 to 31. The validator recognizes the number of days in a given month and also takes leap years into account.	Please enter a date with the format MM/DD/YYYY.
U.S. phone	U.S. phone number with area code. The validator requires 10 digits. It allows hyphens or periods to separate the area code and first three digits of the phone number, and it allows parentheses around the area code.	Please enter a 10-digit phone number. You can use hyphens or periods to separate numerals, and you can put the area code in parentheses.
Zip code	5-digit Zip code or 9-digit Zip code with a hyphen after the first 5 digits.	Please enter a 5-digit Zip code or a 9-digit Zip code with a hyphen after the first 5 digits.