

# Episerver instructions: Creating contact forms

Last updated: 13/12/2019

*This guide covers how to make a form in the Episerver CMS. It will explain how to make a form, what fields can be included, and how to control where the form submissions are sent.*

*If you need further help on the CMS, please check all of our guides available on the [Partner digital hub](#).*

In this guide:

<b>One: Creating a form</b> .....	2
<b>Two: Adding form elements</b> .....	3
<b>Three: All form elements explained</b> .....	6
<b>Four: Form submissions</b> .....	12
<b>Five: Form submissions alert emails</b> .....	15
<b>Six: View and download submissions</b> .....	17
<b>Five: Summary – your quick guide to making forms</b> .....	19

## One: Creating a form

When you create a form, you have several options of where and how to create it, just like with any of the content blocks in Episerver.

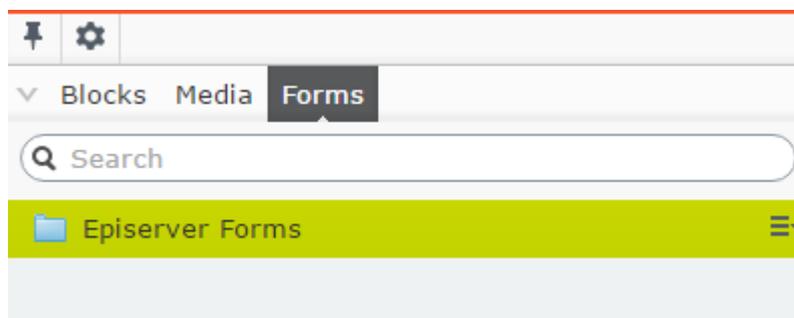
### Create a form on a page

Select *Create a new block* in the content area of the page and select the block *Form container*.



### Create a form in your folders

Click on the folder button in the top right hand corner  and select *Forms*.



Click on the  icon next to Episerver forms and select *New form* from the drop-down menu, or create a new folder to save the form into.

You can also click on the  icon in the bottom left of your folders pane to create a new form.

When you create the form block, you need to name the form block that appears. You will then see a blank form block ready for editing.

## Two: Adding form elements

Form fields are called form elements in Episerver 7.

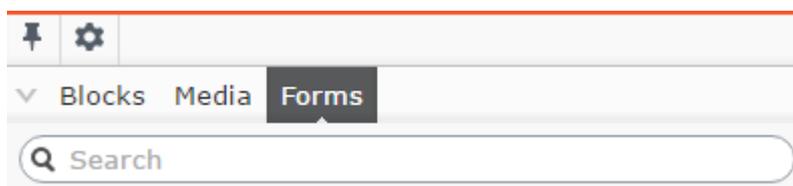
You need to select form elements to put in your empty form block in order to build your form. You can do this in several ways.

In your empty form block, click *browse*:



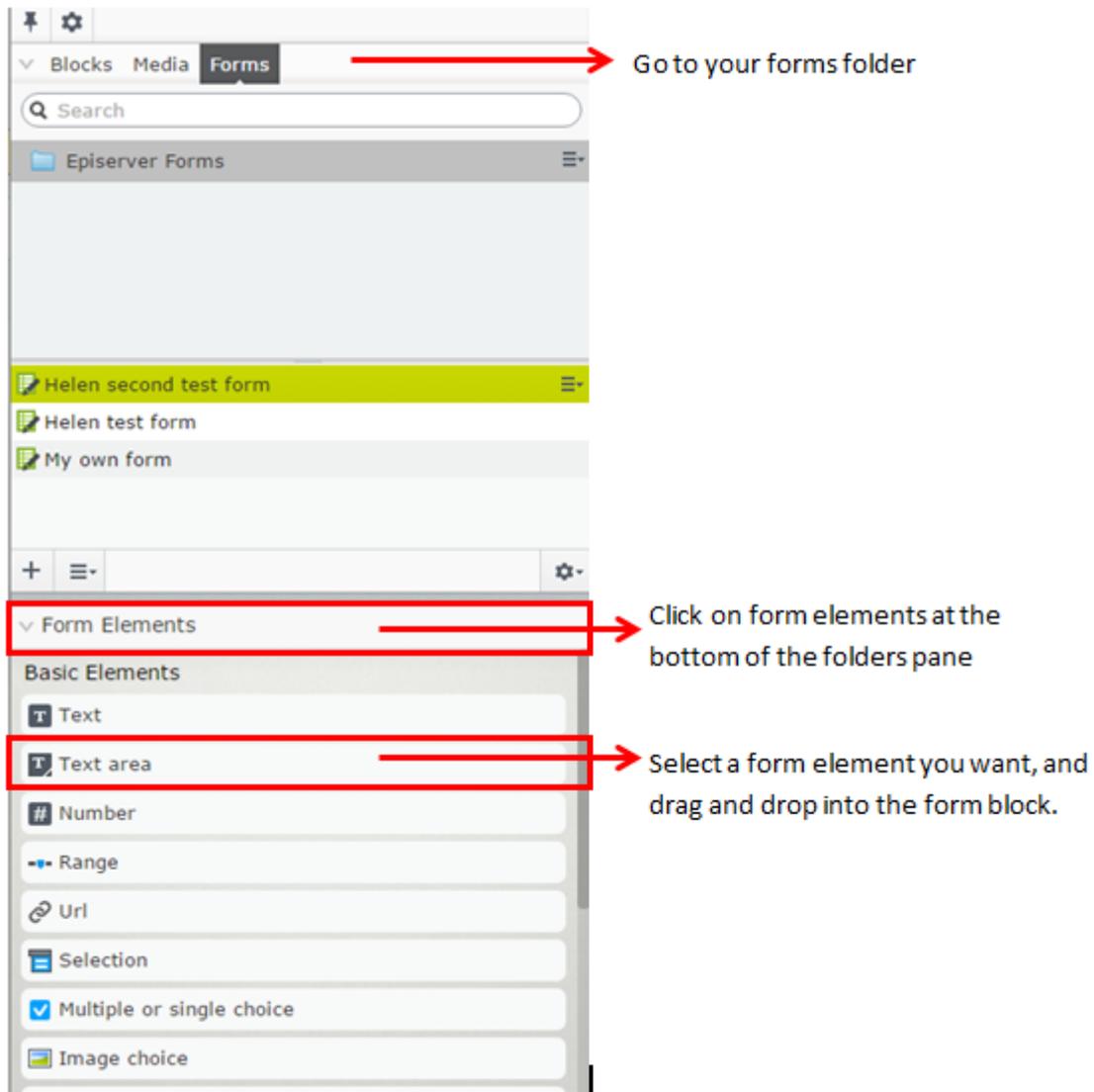
When you click *browse*, you will see a selection screen for all the form elements.

Alternatively, you can find form elements under the form folder. You can drag and drop the form elements into your form block from the folder. To find them, click on the folder icon in the top right hand corner , then select *forms*.



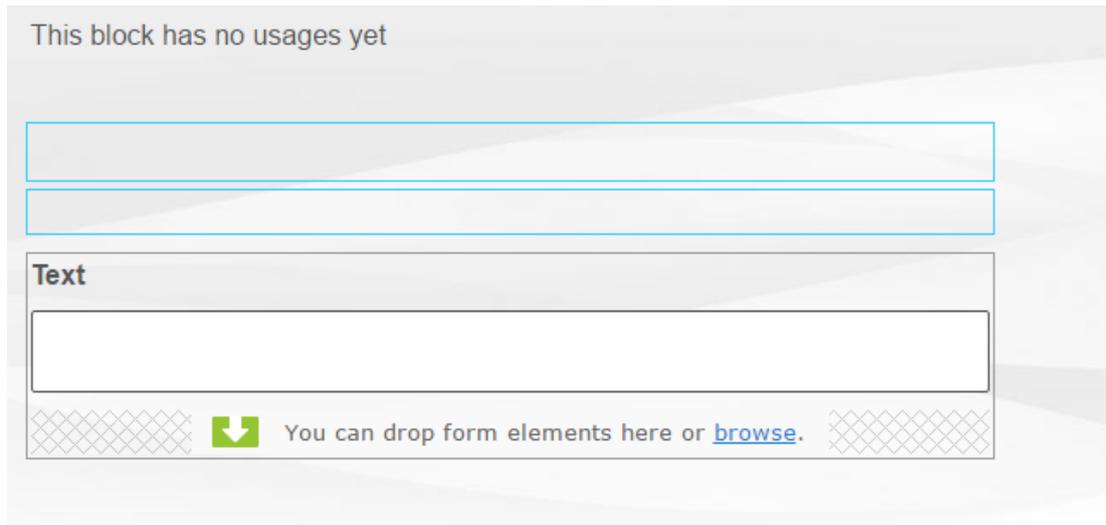
Click on the *Form elements field* at the bottom of the folders pane to see the form elements. Drag and drop these into your form block. Click on the form element, hold and drag it into your form block.

See the image below to guide you.

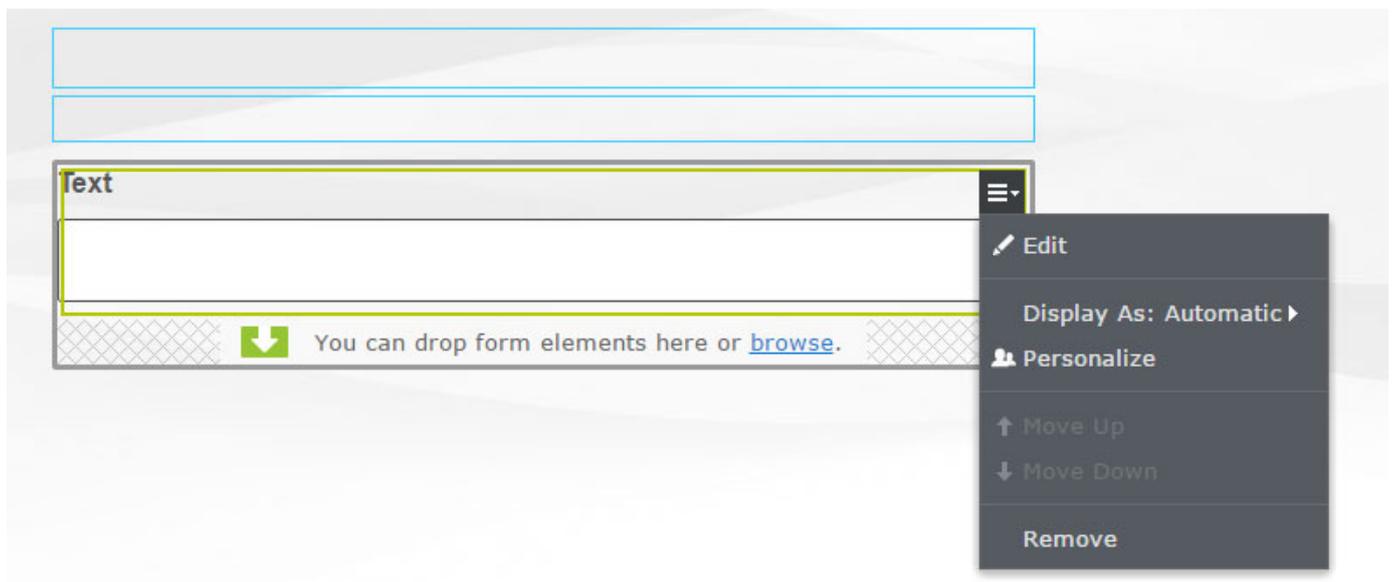


---

When you select a form element it will appear in your form block. In the example below, a text element has been selected.



To edit any form element, hover your mouse over the element, and click on the icon that appears in the right top corner. Select *edit* from the menu.



## Three: All form elements explained

### Properties that appear for most form elements

The screenshot shows a settings panel for a form element, divided into 'Content' and 'Settings' tabs. The 'Content' tab is active. The settings are as follows:

- 1** Label text: A text input field containing the word 'Name'.
- 2** Tooltip: A large empty text area.
- 3** Validators: A list of checkboxes. 'Required' is checked. Other options include 'Regular expression' (with a 'Change' link), 'Email', 'Date (DD/MM/YYYY)', 'Date (MM/DD/YYYY)', and 'Date (YYYY-MM-DD)'. All other checkboxes are unchecked.
- 4** Placeholder text: A text input field.
- 5** Predefined value: A text input field.

**1** **Label** – what the form element will be called on the form that the user sees.

**2** **Tooltip** – tooltips do not need to be used.

**3** **Validators** – these restrict the field to accept a specific type of answer.

**Required** – the user has to fill in the form element in order to submit the form.

**Regular expression** – restricts the answer to a specific format that you want.

**4** **Placeholder text** – this appears in the field before the user has completed the form. See example below. The placeholder disappears when the user starts typing.

Text field fill in

Placeholder text goes here

**5** **Pre-defined value** – Pre-defined values can be useful to prompt users on what to enter, although placeholder text works in a similar way. Unlike placeholder text (see above), the user needs to delete the pre-defined value before they can put in their answer.

## Different types of form elements

---

**Constrained text element** - For the user to type in free text, such as a name.

It will look like this on the form, for example:

**First name**

If you go to the *settings tab* when editing this form element, you can add a character limit for the field. The default limit is set at 100 characters.

---

**Constrained text area** - For the user to put in a larger amount of text, such as a message.

It will look like this on the form, for example:

**Please write your message here**

If you go to the *settings tab* when editing this form element, you can add a character limit for the field. The default limit is set at 500 characters.

---

**Number** – For the user to enter a numerical answer.

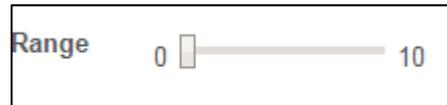
You can restrict the answers a user gives here, to Integer or positive integer. An integer is a whole number, which can be either positive or negative. A positive integer can only be positive, not negative.

---

---

**Range** – Allows the user to select between a range of numbers from a minimum to a maximum.

It will look like this on the form:

A range slider UI element. It consists of a horizontal track with a vertical slider knob. The track is labeled with the word "Range" on the left, the number "0" at the start, and the number "10" at the end. The slider knob is positioned at the "0" mark.

The step setting in this range button means the amount of steps a user can choose between the range maximum and minimum.

EXAMPLE:

If you have a range of 0 to 30 and want users to be able to select only 5, 10, 15, 20, 25, and 30, your step would be 5.

If you wanted users to be able to select any number between 0 to 30, your step would be 1.

---

**URL** - A field for the user to insert a URL to a webpage

---

**Rich text with placeholder** - This is where you could add some extra text or HTML on the form if needed. This may be useful if you want to break up the form with some description-type text.

---

**Captcha** - This is a field for the user to verify that they are not a spammer or a robot.

This is what the user will see.

They will need to fill in the letters they see in the box. If they can't do it they can press *Refresh captcha* to give them a new set of letters.

Word verification

Refresh captcha



---

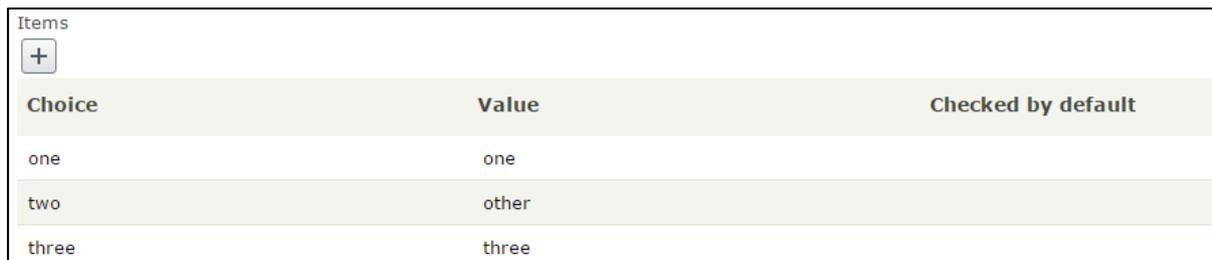
**Selection** - allows you to create a drop-down menu with options for the user.

It will look like this on the form:



If you tick the box *Allow multiple choices*, the user can choose several options.

Under *Items* you can select the + sign to add items to the drop-down menu.



Choice	Value	Checked by default
one	one	
two	other	
three	three	

**Choice** – is what the user will see in their selection.

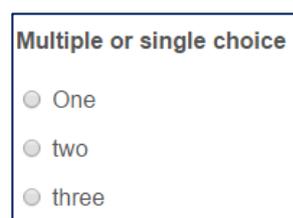
**Value** - this is what you will receive when you see the user's answers to the form. You can keep this the same as the *choice field* or use a shortened version instead. For example, if the choice for the user is "I'd like to be contacted by email", the value you see in the response could be "email".

**Checked by default** – this value will be pre-selected on the form the user sees. They will be able to change it if they want to.

---

**Multiple or single choice** - this allows you to give the user a choice of answers.

It will look like this on the form:



You can select the box *Allow multiple choices* if you want to enable the user to select more than one response.

Under *Items* you can select the + sign to add items to the drop down menu.

**Choice** – is what the user will see in their selection.

**Value** – this is what you will receive when you see the user's answers to the form. You can keep this the same as the *choice field* or use a shortened version instead. For example, if the choice for the user is "I'd like to be contacted by email", the value you see in the response could be "email".

**Image choice** - This field allows the user to select between images.

You can upload your images (or drag and drop them into the area with the green arrow – see our guide [Instructions on block types](#) for more information about dragging and dropping).

You can have a checkbox or button to go with each image to allow the user to select one. The name of the image in the folders of the CMS will also show to the user.

See example to the right:



---

**Hidden predefined value** - This could be something like a capcode that you may want to capture, but that the user wouldn't need to see. For example, if you had different versions of the same form, each form could have its own identifier so when the data is reviewed, you can see who filled in which version of the form.

---

**Hidden visitor profiling** - Allows you to select some hidden profiling information to be collected from the user, similar to information that would be captured by cookies on your website.

This doesn't show on the form, it will be collected from their computer data. You can only select one item to be profiled.

Auto-collect visitor data

<input checked="" type="radio"/> Geo	IP ▼
<input type="radio"/> Profile	▼
<input type="radio"/> User agent	▼
<input type="radio"/> Visitor groups	▼

## Action elements for forms

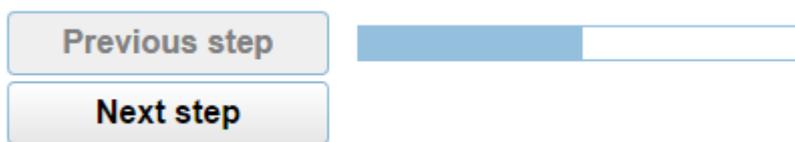
---

### Form step

This allows you to divide your form into steps. This is only necessary for very long forms.

You need to insert the step where you would like the user to proceed to another page to continue.

The user will see this:



The user will then see the next page of the form, with the *step header* you have chosen:



---

### Submit button

For a form to work, you need to add the Submit button field at the end.

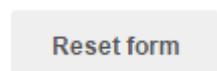
You can add an image for the button, although this isn't really necessary and will not look as user friendly as it removes the "submit" text.



---

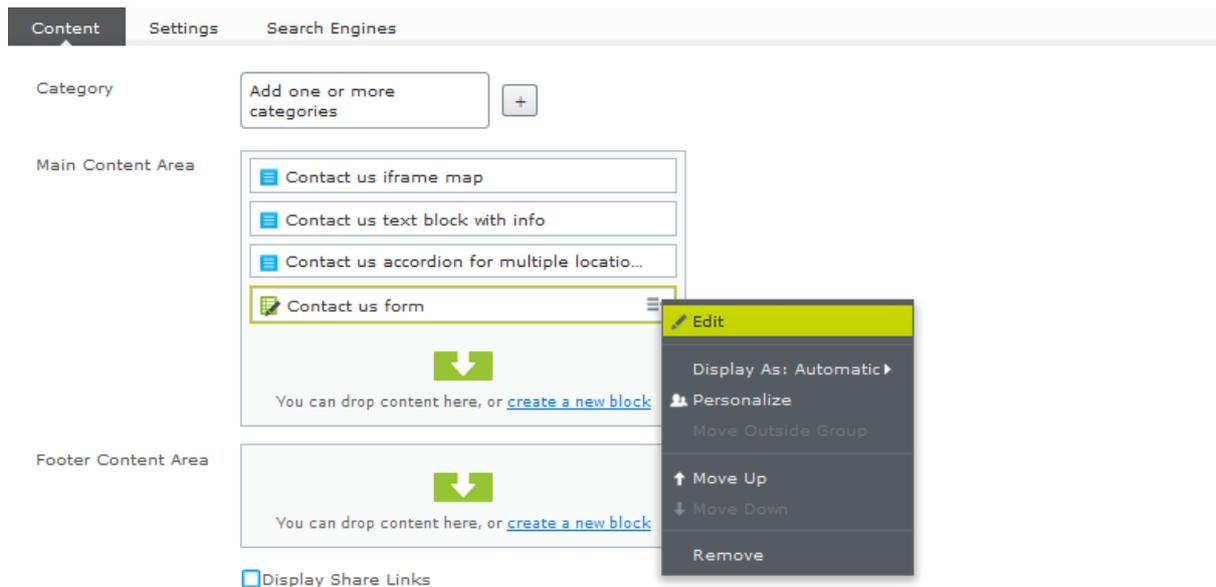
### Reset button

This allows the user to reset the form to blank.

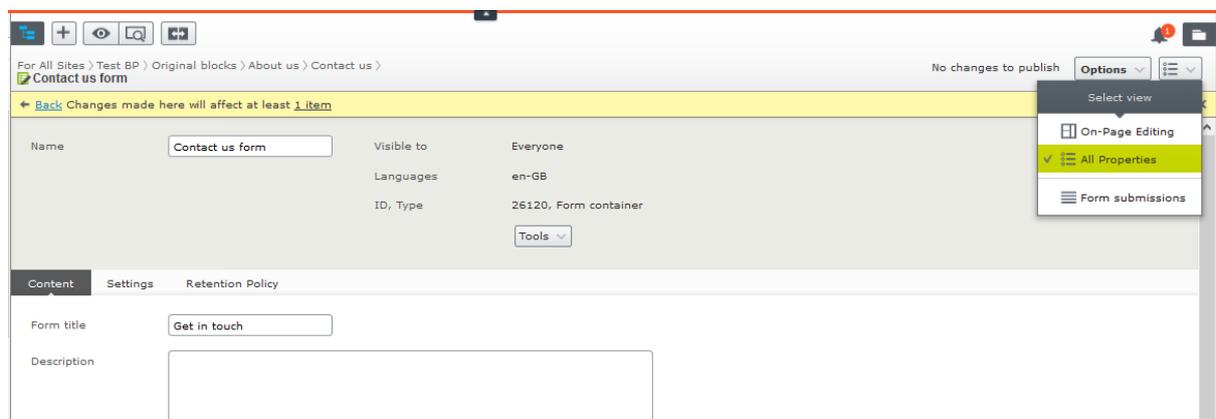


## Four: Form submissions

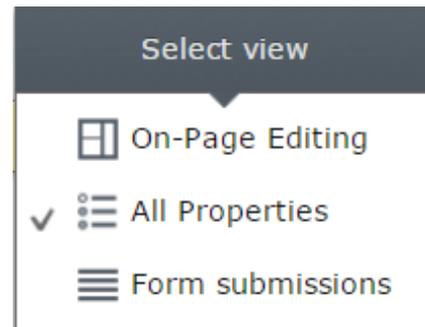
Once you have added all your form fields, go back to your Form container block on your page or in the folder and select *edit*.



Click on the properties button  in the top right corner.



Select the *All properties* view from the drop-down menu.



In the *All properties* view for your form container block, there are Three tabs.



These are **Content** and **Settings** and **retention policy**. You will not be able to change retention policy. This will be set at 90 days in early 2020. Meaning that after 90 days after submission was sent; it will be deleted.

### **Making sure users can submit the form**

When editing the form, Under the **content** tab You must tick the following checkboxes for the form to work correctly:

- Allow anonymous submissions
- Allow multiple submissions from the same IP/cookie

If you do not select these, the user may have problems submitting the form.

### **Content tab – amending the thank you message after submission**

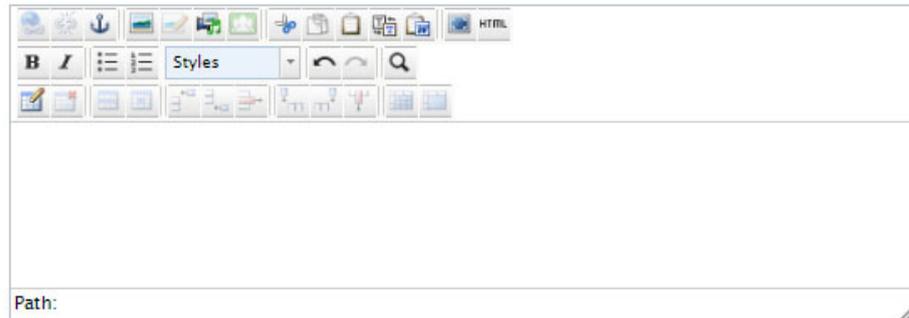
You can control what the user sees when he or she has completed a form and pressed the submit button.

You have two options – the user can see a pop-up message after submitting the form, or they will see a separate thank you page. Read about these options below.

### **Display message after form submission**

If you want the user to see a pop-up message on the page when they have submitted the form, fill in the *Display message after form submission* box in the form properties page.

Display message  
after form submission  
(not displayed if  
redirecting)



The image shows a rich text editor interface. At the top, there is a toolbar with various icons for text formatting (bold, italic, underline, strikethrough), alignment (left, center, right, justified), list creation (bulleted, numbered), indentation, and other functions. Below the toolbar is a large, empty text area for entering content. At the bottom left of the text area, there is a label 'Path:' followed by a small input field.

The message you insert will display to the user when they have submitted the form. This means you don't have to create a separate thank you page for the user to see after the form submission if you prefer not to.

### Thank you page for form submissions

If you want to create a separate thank you page which the user will see instead, then create your page in your site tree, remembering to amend the properties of the page to hide it from your website menus and from search engines such as Google.

See our guide on [Creating a new page](#) to find out more about amending the page properties.

Then link the thank you page to your form settings under the field *Display page after submission*. Click the grey button to choose the page from your site tree.

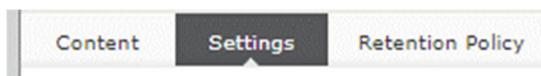
Display page after  
submission

## Five: Form submissions alert emails

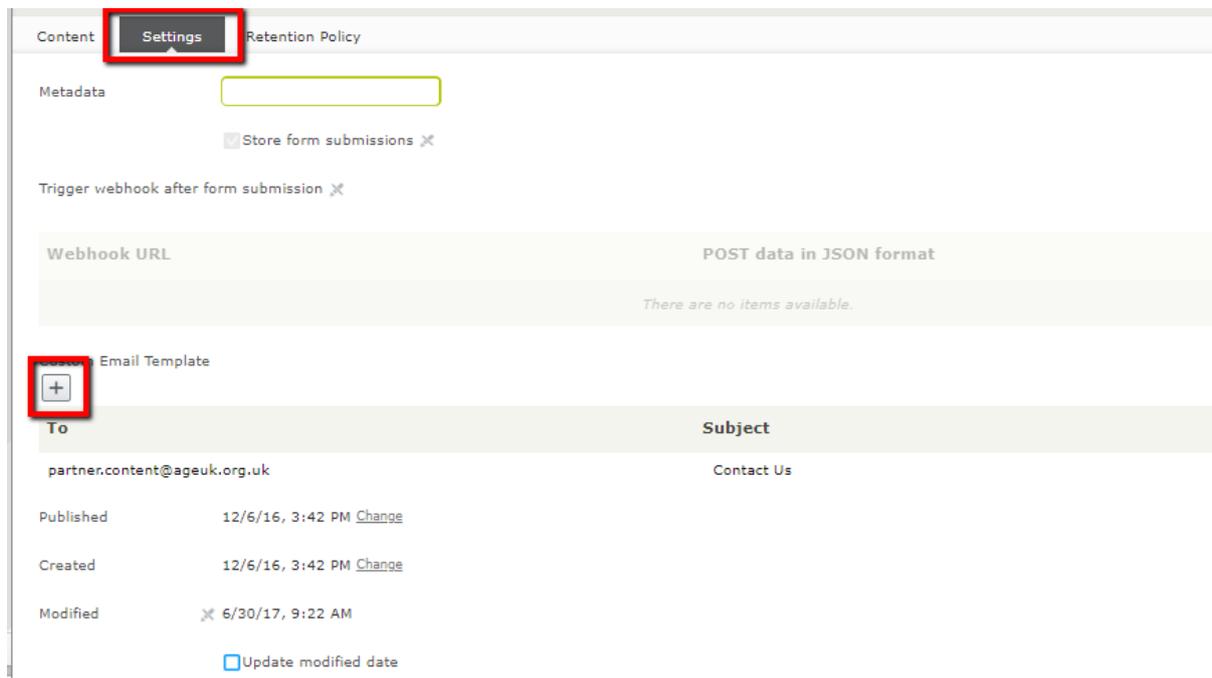
The Form submissions data is not emailed to you; they are stored in the CMS and can be downloaded from there. However you can receive an email telling you that you have had a submission. If you do not set this up you will not know when an email has been submitted.

To set up this email

### The settings tab



In the specific form, go to the settings tab. Here you can fill in any metadata for this form (that is the information that search engines like Google use to list the page on search engine results).

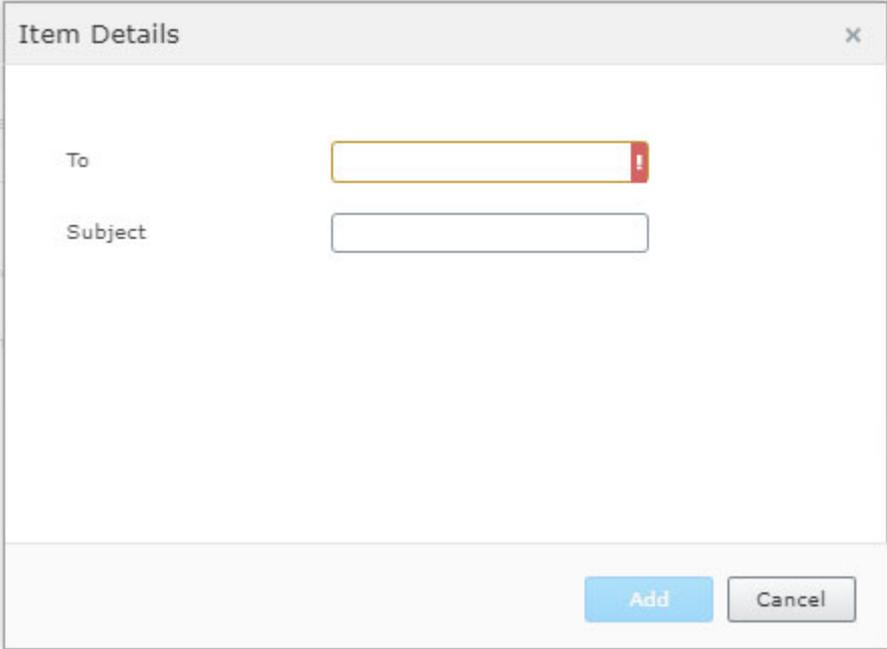


In the Settings tab under the form properties page, select the plus sign under *Custom email template*.

Custom Email Template



A box will pop up for you to create the email that you will receive when someone fills in the form on your website.

A screenshot of a web application dialog box titled "Item Details" with a close button (X) in the top right corner. The dialog contains two input fields: "To" and "Subject". The "To" field is currently empty and has a red exclamation mark icon on its right side, indicating a validation error. The "Subject" field is also empty. At the bottom of the dialog, there are two buttons: a blue "Add" button and a grey "Cancel" button.

**To:** Put the email address where you want to receive the form submission.

**Subject field:** Put the subject line you will see in the email.

When the email is received this will tell the recipient what form/ page they need to check for new data submissions.

Emails will be sent with a standard message of "An enquiry has been was submitted through your website. Please log in to the CMS to download the data." The form data will not be included in these emails.

You can have multiple email address recipients added here. Just click the  to add another

Emails will be sent with an address of noreply@ageuk.org.uk.

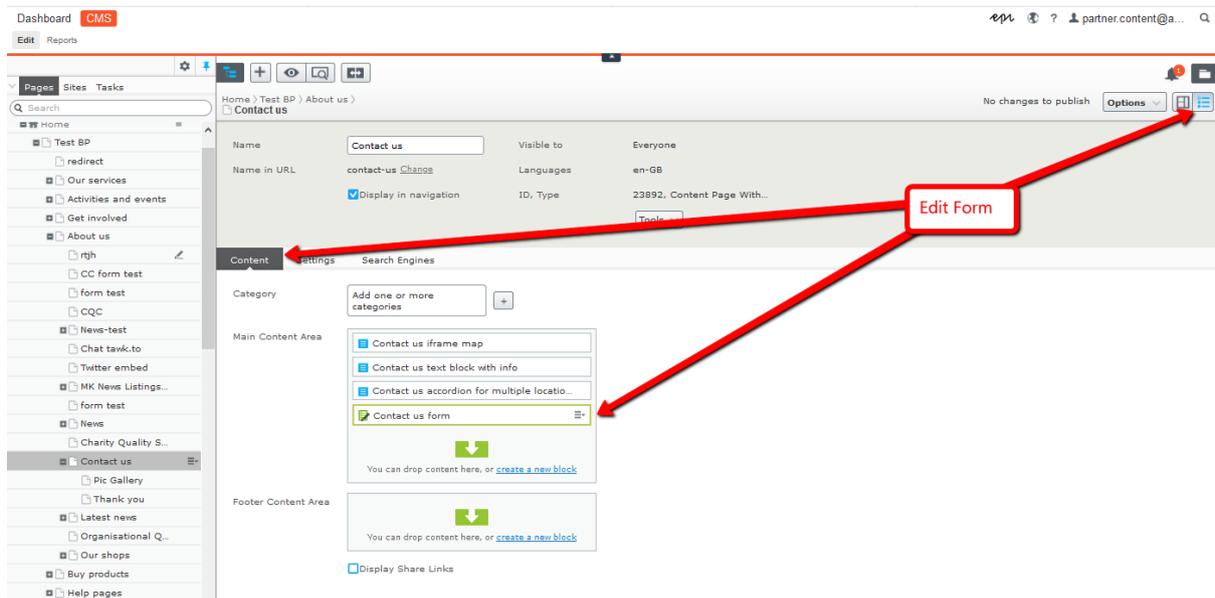
The "Webhooks" functionality has been disabled for editors.

## Six: View and download submissions

When you receive an alert email, log in to the CMS (if you do not have a login contact partner.content@ageuk.org.uk

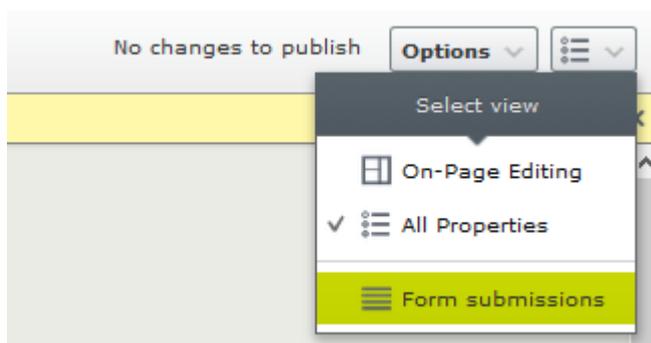
The email subject should tell you what form you are looking for.

Go to the page with the specific form on it



The screenshot shows the CMS interface for editing a 'Contact us' form. The top navigation bar includes 'Dashboard CMS', 'Edit Reports', and user information. The left sidebar lists various pages and forms. The main content area shows the 'Contact us' form configuration, including fields for Name, Name in URL, Visible to, Languages, and Display in navigation. A red box labeled 'Edit Form' is positioned over the 'Edit Form' button in the top right corner. A red arrow points from this button to the 'Contact us form' block in the Main Content Area.

Once In the form, on the top right select the form submission view



The screenshot shows the 'Select view' dropdown menu in the CMS interface. The menu is open, showing three options: 'On-Page Editing', 'All Properties' (which is selected and has a checkmark), and 'Form submissions' (which is highlighted in green). The background shows the 'Options' dropdown menu and the 'No changes to publish' status.

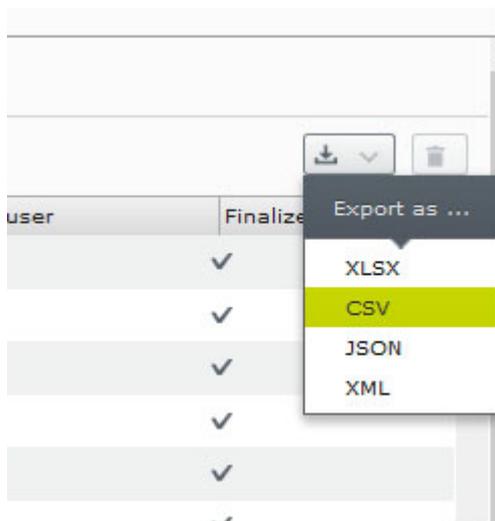
The you will see all the submission for that form.

Form submissions

Search [ ] All columns [v] From date [ ] To date [ ]  Finalized Only

<input type="checkbox"/>	Email	Number	Name	My enquiry is about	Message	Submitted from	Time	By user	Finalized
<input type="checkbox"/>	mickey.mouse@dis...		Mickey Mouse	Your services	Your services	<a href="#">Contact us</a>	2019-07-17, 11:39...	christopher.craig	✓
<input type="checkbox"/>	donald.duck@disne...		Donald Duck	Volunteering	Volunteering	<a href="#">Contact us</a>	2019-07-17, 11:41...	christopher.craig	✓
<input type="checkbox"/>	goofy@disney.com		Goofy	Donations	Donations	<a href="#">Contact us</a>	2019-07-17, 11:42...	christopher.craig	✓
<input type="checkbox"/>	bugs.bunny@warner...		Bugs Bunny	Other	Other	<a href="#">Contact us</a>	2019-07-17, 11:43...	christopher.craig	✓
<input type="checkbox"/>	percy.pig@warnerbr...		Percy Pig	Your services	Your services	<a href="#">Contact us</a>	2019-07-17, 11:44...	christopher.craig	✓
<input type="checkbox"/>	betty.boop@warner...		Betty Boop	Advice	Advice	<a href="#">Contact us</a>	2019-07-17, 11:46...	christopher.craig	✓
<input type="checkbox"/>	jessica.rabbit@mar...		Jessica Rabbit	Volunteering	Volunteering	<a href="#">Contact us</a>	2019-07-17, 11:47...	christopher.craig	✓
<input type="checkbox"/>	baby.herman@mar...		Baby Herman	Your services	Your services	<a href="#">Contact us</a>	2019-07-17, 11:49...	christopher.craig	✓

You can then export them in your preferred format e.g. XLSX, CSV, JSON XML



### Stored form submissions in the CMS

Each form submissions will be automatically stored in the CMS for a **limited time of 90 days**.

## Five: Summary – your quick guide to making forms

**1** Create a new block and select the Form Container block **OR** create a new form in the Forms folder.

**2** Fill the form container block with your desired form elements. Don't forget the submit button.

**3** Edit the properties of the form.

- Metadata for search engines
- The email address where the form alert submissions will be sent
- Create a thank you pop-up message or a thank you page.
- Tick the checkboxes for anonymous and multiple submissions.

**4** Use your form on a page.

**5** Download the submissions from the CMS

---

*There are more guides and training videos available on the [Partner digital hub](#).*

*If the answers you need are not in the guides or videos, then please contact [partner.content@ageuk.org.uk](mailto:partner.content@ageuk.org.uk)*