

# SmartFormer Gold extension for Magento2

## User Guide

version 1.0



## Contents

1. Introduction .....	5
2. Installation .....	7
2.1. System Requirements .....	7
2.2. Installation.....	7
2.3. License.....	7
3. General Settings .....	8
4. Managing Forms.....	9
4.1 List of Forms .....	9
4.2 Editing Form .....	12
4.2.1 Editor Overview .....	12
4.2.2 Form Properties.....	13
4.2.3 Elements.....	15
4.2.3.1 Input Box .....	15
4.2.3.2 Password .....	17
4.2.3.3 Check Box .....	18
4.2.3.4 Radio Button.....	19
4.2.3.5 File Upload.....	20
4.2.3.6 Button Type 1 .....	21
4.2.3.7 Button Type 2 .....	23
4.2.3.8 Reset Button .....	24
4.2.3.9 Submit Button .....	25
4.2.3.10 Text Area .....	26
4.2.3.11 Select Box .....	26
4.2.3.12 List Box .....	28
4.2.3.13 Static Text.....	29
4.2.3.14 Link .....	30
4.2.3.15 DIV Element.....	31
4.2.3.16 Image.....	32

4.2.3.17 Drawing Canvas/Digital Signature .....	33
4.2.3.18 Captcha Image .....	34
4.2.4 Snippets.....	35
4.2.4.1 Optional Input Box with Title.....	35
4.2.4.2 Required Input Box with Title .....	36
4.2.4.3 Required Password Box .....	37
4.2.4.4 Required Confirm Password Box .....	38
4.2.4.5 Optional Set of Checkboxes (variant 1).....	39
4.2.4.6 Optional Set of Checkboxes (variant 2).....	40
4.2.4.7 Optional Set of Radio Buttons (variant 1) .....	41
4.2.4.8 Optional Set of Radio Buttons (variant 2) .....	42
4.2.4.9 Optional File Upload with Title .....	43
4.2.4.10 Optional Text Area with Title.....	44
4.2.4.11 Optional Select Box with Title.....	45
4.2.4.12 Optional List Box with Title .....	46
4.2.4.13 Optional Calendar box with Title .....	47
4.2.4.14 Required Captcha with Input Field .....	48
4.2.4.15 Optional Digital Signature.....	49
4.2.4.16 Optional Drawing Area .....	50
4.2.5 Tools .....	51
4.2.5.1 PHP Editor.....	52
4.2.5.2 HTML Editor.....	54
4.2.5.3 JavaScript Editor .....	55
4.2.5.4 CSS Editor .....	56
4.2.5.5 Email Templates .....	57
4.2.5.6 Validation Rules .....	58
4.2.5.7 Database Designer.....	61
4.2.6 Element Properties.....	62

4.2.6.1	Common Properties.....	62
4.2.6.2	Attributes.....	64
4.2.6.3	Styles .....	65
4.2.6.4	Events .....	66
4.2.6.5	Color Selector .....	67
4.2.6.6	Image Selector .....	67
4.2.6.7	HTML Editor.....	69
4.2.6.8	Rich Text Editor.....	70
4.2.6.9	PHP Editor.....	71
4.2.7	Editing Actions.....	72
4.2.8	Hot Keys.....	73
4.2.9	Editor Options .....	73
4.2.10	Help Options.....	74
4.3	Cloning Forms.....	76
4.4	Importing/Exporting Forms .....	77
4.5	Changing Form Status .....	78
4.6	Deleting Forms .....	79
5.	Managing Submissions .....	80
5.1	List of Submissions .....	80
5.1.1	Filtering Submissions .....	81
5.1.2	Selecting Columns .....	82
5.1.3	Exporting to CSV.....	83
5.1.4	Exporting to PDF.....	84
5.1.5	Deleting Submissions.....	85
5.2	Editing Submissions.....	86
6.	Publishing Forms .....	87
6.1	Accessing Form via Direct URL .....	87
6.2	Inserting Form into CMS or Static Block .....	87
6.3	Publishing Form via XML layout .....	88
7.	Managing Submissions by Customer.....	89



## 1. Introduction

The document is a User Guide for extension **SmartFormer Gold** created for Magento2 websites. It describes the extension functionality and provides some tips for a quick start.

The SmartFormer Gold extension for Magento 2 is a professional form builder. It is developed with a bunch of features suitable for any level of user from newbies to programmers.

### Comprehensive and Easy-to-Use Editor

Editing form fields in the SFG editor is noticeably fast. The convenient working area has been developed as a WYSIWYG (What You See is What You Get) and allows to drag-and-drop and align HTML elements on the form the way you need it. The area is fully managed, hot keys and other handy options provide a wide range of useful actions. The form layout can easily be customized. The form behavior can also be changed by using integrated PHP, CSS, JS and HTML editors. The extension allows creating multi-page forms.

### HTML Elements and Snippets

18 HTML elements are available in the toolbar: checkboxes, radio buttons, input box, static text, text area, select and list boxes, elements "Drawing Canvas / Digital Signature", "DIV element", "File Upload", "Captcha", "Password", "Link", "Image", and 4 types of buttons are embedded into the extension. Ready-to-use HTML snippets containing the grouped elements will help creating form in a few clicks.

### Common and Unique Elements Properties

Each of the HTML elements has common and unique properties available in the working area. The properties will help to design the form and make it look professional. Unique properties of elements, conditional fields, validation rules, default text, on-click actions, email notifications, and so on. Common properties allow to customize styles, behavior, and attributes of the element. Built-in PHP editor will help adding custom PHP scripts to the element properties when necessary.

### Customizable Email Notifications

Email notifications are embedded in the SFG extension. All email templates are customizable and can have a unique design within a particular form. The WYSIWYG editor helps to edit the text. Dynamic variables used in the template will be substituted with the data entered by the user. After the form is submitted, both admin and users can be notified by email.

### Database Manager

Once the form has been created the admin can create a separate database table to store the submitted data in. The form fields are associated right to the DB table columns. All the submitted data can be analyzed, filtered, and exported later on.

## **Forms' Submissions**

Once the forms have been submitted, all submissions are organized in the list. There is ability to edit them, delete, apply filters, choose columns, and export to the CSV or PDF files. The list of submissions helps to collect and transfer customers' data within the whole website. Each customer submitted the form can easily update or convert their submissions into PDF. The separate section appears on the customer dashboard where all submitted forms are organized in the list.

## **Exporting to CSV/PDF**

All submitted forms can be converted into the CSV or PDF format. Users can easily download the submitted results to save locally or to email to third-parties later.

## **Publishing Forms**

A form can be embed in any Magento area, from inserting a form's link in a particular page or block, to showing forms via XML layout. After form has been created it can be accessed via the direct URL on the frontend. The extension allows to insert the form to CMS pages or static blocks using widgets, or insert the form anywhere on the page via the XML layout.



## 2. Installation

### 2.1. System Requirements

The extension requires Magento 2.x

### 2.2. Installation

The extension is provided as a .zip archive with the source code and the installation instructions.

Unpack the source code into **/app/code/Itoris/Itoris\_SmartFormerGold/** folder on your server. And run the following commands in the SSH console:

```
php bin/magento module:enable --clear-static-content Itoris_SmartFormerGold  
php bin/magento setup:upgrade
```

Then log into Magento backend and flush cache in **System -> Cache Management -> Flush Magento Cache**

If you experience any issues with the extension installation please contact us here -

<https://www.itoris.com/contact-us.html>

### 2.3. License

The extension has full open source code. One license/purchase can be used on a single production Magento2 website and its development instances. The extension can be customized for the license owner needs. Redistribution of the extension or its parts is not allowed. Please read more details here -

<https://www.itoris.com/magento-extensions-license.html>



### 3. General Settings

The SmartFormer Gold extension can be enabled or disabled globally or per certain store view following:  
**STORES -> Settings -> Configuration -> ITORIS EXTENSIONS -> SmartFormer Gold.**

The screenshot displays the ITORIS Configuration interface. On the left is a vertical sidebar with icons and labels for various sections: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The 'STORES' section is highlighted with an orange arrow. The main content area is titled 'Configuration' and includes a search icon, a notification bell, and a user profile 'admin'. Below the title bar, there's a 'Store View' dropdown set to 'Default Config' and a 'Save Config' button. A left-hand menu lists categories: GENERAL, ITORIS EXTENSIONS, CATALOG, CUSTOMERS, SALES, SERVICES, and ADVANCED. The 'ITORIS EXTENSIONS' category is expanded, showing 'General Settings' and 'SmartFormer Gold'. An orange arrow points to 'SmartFormer Gold'. The 'General' settings for 'SmartFormer Gold' are shown, with the 'Extension Enabled [store view]' dropdown set to 'Yes'.

## 4. Managing Forms

### 4.1 List of Forms

Once the extension has been installed, section "SmartFormer Gold" appears in the Content menu:

**CONTENT -> SmartFormer Gold -> Form Manager.**

Tab "Form Manager" contains the list of existing forms. By default four fully developed example forms are available in the list.

You can apply the following actions:

**Search** – enables a form search based on the current filters.

**Reset Filters** – restores all filters.

**Mass Actions** – lists the following actions applied to the selected forms in the list:

- **Delete** – removes the chosen forms from the list.
- **Update Status** – changes statuses of the chosen forms.
- **Clone** – creates copies of the chosen forms.
- **Backup** – creates backups of the forms to be saved locally.
- **Forms per Page** – shows how many forms can be displayed per page.

- DASHBOARD
- SALES
- PRODUCTS
- CUSTOMERS
- MARKETING
- CONTENT
- REPORTS
- STORES
- SYSTEM
- FIND PARTNERS & EXTENSIONS

Create Form

Search

Reset Filter

Actions

5 records found

20 per page

1 of 1

	#	Form Name	Description	Submissions	Status	Actions	Direct URL to the form
Any	From						
	To						
<input type="checkbox"/>	1	Contact Us Form Example	Sample form. Allows collecting visitors' requests from the external part of the site. Features: * Conditional branching. Displaying states when US is selected * Expanding the form when a new field is added * Protected with Captcha	10	Enabled		<a href="http://www.magento-store.com/sfg/form/index/formid/1/">http://www.magento-store.com/sfg/form/index/formid/1/</a>
<input type="checkbox"/>	2	PDF Form Example	Ability to fill in the form and convert it into the PDF format. Digital Signature to sign the form.	0	Enabled		<a href="http://www.magento-store.com/sfg/form/index/formid/2/">http://www.magento-store.com/sfg/form/index/formid/2/</a>
<input type="checkbox"/>	3	Quote Form Example	Product Search, AJAX, Progress Bar	13	Enabled		<a href="http://www.magento-store.com/sfg/form/index/formid/3/">http://www.magento-store.com/sfg/form/index/formid/3/</a>
<input type="checkbox"/>	4	Poll example	Multi-page form, AJAX, animated results	17	Enabled		<a href="http://www.magento-store.com/sfg/form/index/formid/4/">http://www.magento-store.com/sfg/form/index/formid/4/</a>
<input type="checkbox"/>	5	Quick Enquiry Form	A query tool that quickly collects custom information.	n/a	Disabled		<a href="http://www.magento-store.com/sfg/form/index/formid/5/">http://www.magento-store.com/sfg/form/index/formid/5/</a>

Upload Forms

Select File:

Browse...

No file selected.

Upload

The list provides the following columns:

**Selection State** – defines how products are listed when checkbox is marked.

**# or ID** – defines the ID of the created form.

**Form Name** – displays the form's title used for inner purposes.

**Description** – displays the form's description used for inner purposes.

**Submissions** – shows how many times the forms are submitted by users:

- 0 – form has not been submitted yet
- 10\* – shows a number of records. The form has been submitted 10 times. Each number is linked to the list of submissions
- n/a (not available) – the form is not yet connected to the database

**Status** – indicates the current status of the form: enabled or disabled. Only active forms are available on Frontend.

**Actions** – lists actions applied per form:

- **Edit** – opens the form for editing. The same action can be accomplished by clicking anywhere on the row.
- **Delete** – deletes the form from the list.
- **Clone** – creates a copy of the form.
- **Backup** – creates a backup of the form to be saved locally.

**Direct URL to the form** – provides the direct link to each form on Frontend. Each direct form's URL shows the actual form's ID.

Section "**Upload Forms**" below the list allows to upload a backup of the form. After the backup is loaded, button "Upload" becomes active.

To create a new form, click button "**Create Form**" above the list.

## 4.2 Editing Form

This chapter highlights the main features of the content editor.

### 4.2.1 Editor Overview

After the form is open for editing, the following working area becomes available. Or you can create a new form by clicking the "Create Form" button.

The screenshot shows the Magento Admin interface with the SmartFormer Gold form editor. The sidebar on the left contains navigation links for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main workspace displays a 'Contact Us' form on a grid background. The form is titled 'Contact Us' and includes 'Store Hours' information: Monday - Friday: 10:00 a.m. - 9:00 p.m., Saturday: 9:30 a.m. - 9:00 p.m., and Sunday: 11 a.m. - 7 p.m. The form is currently on Page 1 of 7 pages.

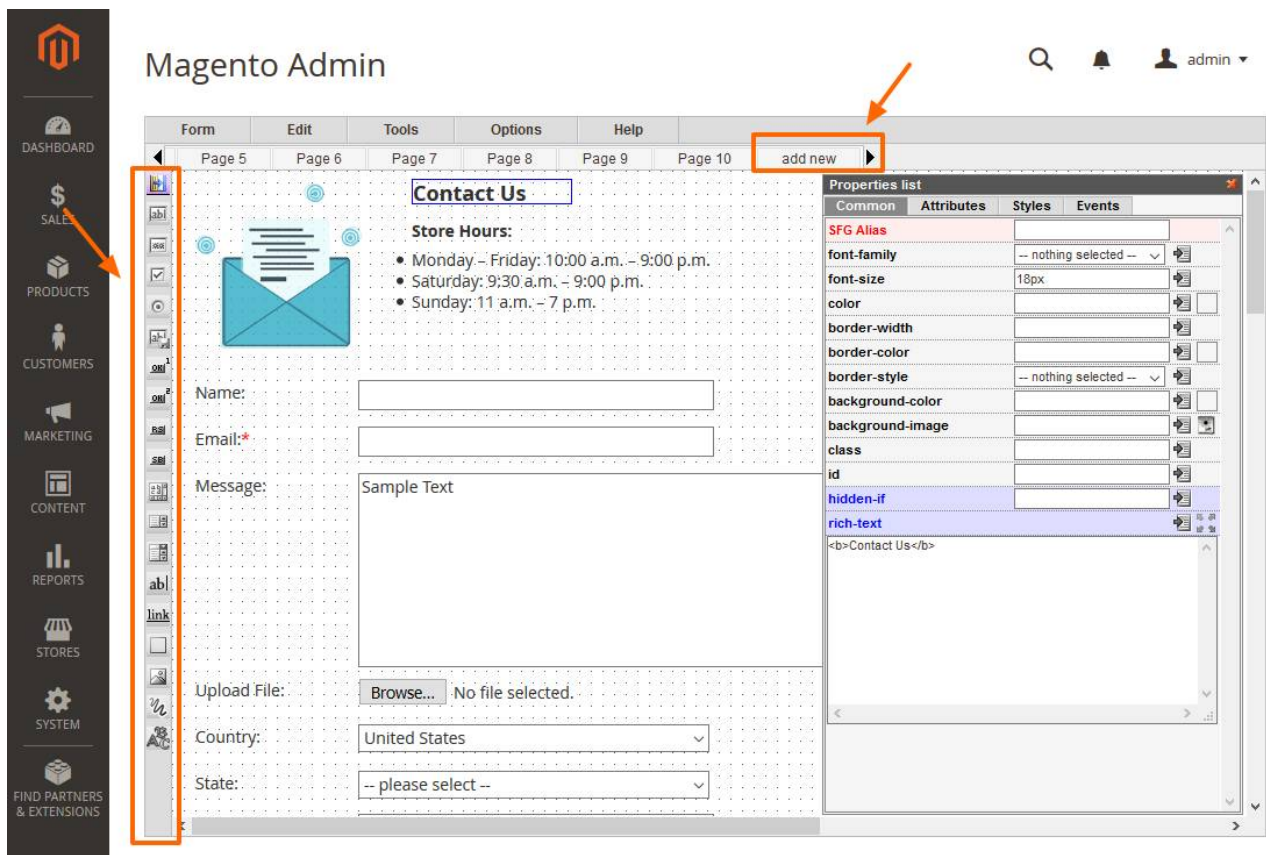
The main working area is developed on the drag-and-drop principle and provides with its horizontal and vertical alignments. You can move, delete, or copy all elements as the group by drawing the border around them and applying an action.

The extension allows to increase or decrease cells on the grid to make the process of creating forms more convenient and more visually structured.

You can create a multi-page form by adding more pages above the area. If a one-page form is required only, Page 1 will be selected. If a multi-page form is required, next Page 2 is to be switched. By default 10 pages are available. To add more pages, click button "add new". There is no limitation on the number of pages per form.

The menu bar contains options for saving, deleting, editing, applying tools for advanced use. There is also some tips and useful information about the SmartFormer Gold extension.





All elements available in the tool bar can be easily selected and dragged to the working area. To simplify adding elements there is ability to use snippets or ready-to-use group of elements available at the top of toolbar.

To delete the chosen element, click button "Delete". You can apply the same actions using options in the menu bar or the hot keys.

Each element is customizable and has properties adding various attributes, styles, or events to make elements look more appropriately for each customer's need. If one element is selected, the box with properties appears. The box can be disabled in the menu.

#### 4.2.2 Form Properties

Each form has the general properties available in the menu bar: **Form -> Properties**.

You can find the following options in the appeared popup:

**Form Name** – the required title per each form. The form title is shown as the page title on the frontend.

**Form Discription** – the optional discription for a created form. The discription will be used for the inner purposes only.

**Maximum submissions per customer** – allows to set a maximum number of allowed submissions per customer. By default 0 (zero) is set allowing to submit the form unlimited number of times.

**Allow to edit submissions** – the submitted form is saved in the customer account. The setting allows or disallows customers to edit submitted information on Frontend.

**Submit form via AJAX** – if "Yes" is chosen the form will be submitted without reloading the entire page.

**The form is connected to DB table** – each form can be associated with the Database to store the submitted data. If the form is connected to the Database, the title of Database table will be written here.

**External Access to the form** – limits the access to the form for specified customer groups in list box. If no groups are chosen, the form will be available for all customer groups.

**Auto-responsive form** – if option "Yes" is chosen, the form with different elements will be adapted to all mobile and tablet devices.

**Save Form** – saves the newly created form.

### 4.2.3 Elements

The extension provides eighteen elements available per form.

Each element has the properties that could vary from one to another element. Properties add unique characteristics to each element by adding custom styles, attributes or behavior. There are common and specified properties.

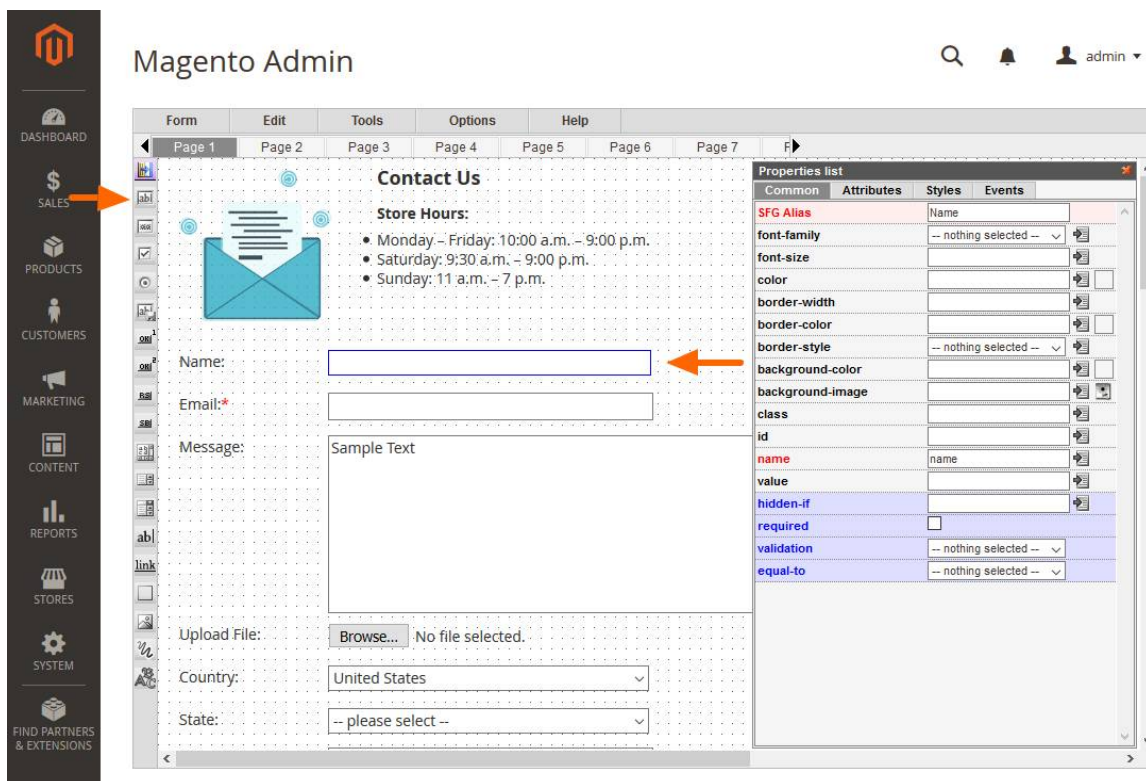
The most important properties available per element are "SFG Alias" and "Name".

**SFG Alias** – the title of the chosen element available in admin area after the form is submitted. SmartFormer Gold Alias is also used in all reports and email templates. The property should be clear to see the data, entered by users, in correct format.

**Name** – the unique name is used to define the element on the form and to bind it to the database. Name should be alpha-numeric with no spaces and special characters, in lower case preferably.

#### 4.2.3.1 Input Box

The first element is "Input box" with the following unique properties:



**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. For instance, to show the State field if the United States selected enter the following into the "hidden-if" property of the State field:

```
{{country}} != 'United States'
```

That means the State field should be hidden if country is NOT the "United States".

The property provides the PHP editor for advanced use. See Chapter 4.2.5.1 PHP Editor for more information.

**Required** – makes the element required or optional.

**Validation** – checks the entered value against certain validation rule.

**Equal-to** – is used to equate the current element to another one. The property is used in case of data confirmation, or retyping the same information.



### 4.2.3.2 Password

The "Password" element provides the following properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.

**Required** – makes the element required or optional.

**Equal-to** – is used to equate the current element to another one. The property is used in case of data confirmation, or retyping the same information.

The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with navigation icons and labels: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. An orange arrow points from the 'PRODUCTS' icon to the main content area. The main content area is titled 'Magento Admin' and shows a 'Contact Us' form. The form includes a 'Store Hours' section with a list of hours, and input fields for 'Name', 'Email\*', 'Password\*', and a 'Message' text area. An orange arrow points from the 'Password\*' input field to the 'Properties list' panel on the right. The 'Properties list' panel has tabs for 'Common', 'Attributes', 'Styles', and 'Events'. The 'Common' tab is active, showing a list of properties for the 'Password' element. The properties listed are: SFG Alias (Password), font-family (nothing selected), font-size (nothing selected), color (nothing selected), border-width (nothing selected), border-color (nothing selected), border-style (nothing selected), background-color (nothing selected), background-image (nothing selected), class (nothing selected), id (nothing selected), name (password), value (nothing selected), hidden-if (nothing selected), required (checked), and equal-to (nothing selected).



#### 4.2.3.3 Check Box

The "Check Box" element has the following unique properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.

**Required** – makes the element required or optional.

**Group - required** – if several checkboxes are to be considered as a group, only one checkbox can be marked as "group-required". All grouped checkboxes should have the same "Name" attribute adding "[]" at the end of each name. For example, education[]. All checkboxes in the same group should have different "Value" attribute.

The screenshot displays the Magento Admin interface. On the left, a vertical sidebar contains various menu items: DASHBOARD, SALES, PRODUCTS (highlighted with an orange arrow), CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area shows a form titled 'Magento Admin' with fields for HOME, WORK, PHONE, NAME, SOCIAL SECURITY NO., SEX (MALE/FEMALE), EDUCATION\*, and EMPLOYEE SIGNATURE\*. The EDUCATION\* field contains a list of checkboxes for different education levels: HIGH SCHOOL DIPLOMA, TRADE CERTIFICATE, COLLEGE - NO DEGREE, ASSOCIATE'S DEGREE, BACHELOR'S DEGREE, MASTER'S DEGREE, PROFESSIONAL DEGREE, PH.D., and OTHER DOCTORATE. At the bottom of the form are buttons for 'Generate PDF' and 'Submit Form'. On the right side, a 'Properties list' panel is open, showing the configuration for the 'Education' checkbox. The 'name' attribute is set to 'education[]', and the 'value' attribute is set to 'HIGH SCHOOL DIPLOMA'. Other attributes like 'checked', 'hidden-if', 'required', and 'group-required' are also visible.

#### 4.2.3.4 Radio Button

The "Radio Button" element provides the following unique properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.

**Group - required** – if several radio buttons are to be considered as a group, only one radio button can be marked as "group-required". All grouped radio buttons are to have the same "Name" attribute, but different "Value" attribute.

The screenshot displays the Magento Admin interface. On the left is a sidebar with navigation icons and labels: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main area is titled 'Magento Admin' and shows a form editor for a customer profile. The form is divided into sections: HOME, WORK, PHONE, NAME, SOCIAL SECURITY NO., SEX, EDUCATION, and EMPLOYEE SIGNATURE. The 'SEX' field is highlighted with a red box, and an arrow points to its 'Properties list' panel on the right. The 'Properties list' panel shows various attributes for the 'SEX' field, including 'name', 'checked', 'value', 'hidden-if', and 'group-required'. The 'hidden-if' and 'group-required' properties are highlighted in blue.

#### 4.2.3.5 File Upload

The "File" element provides the following unique properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.

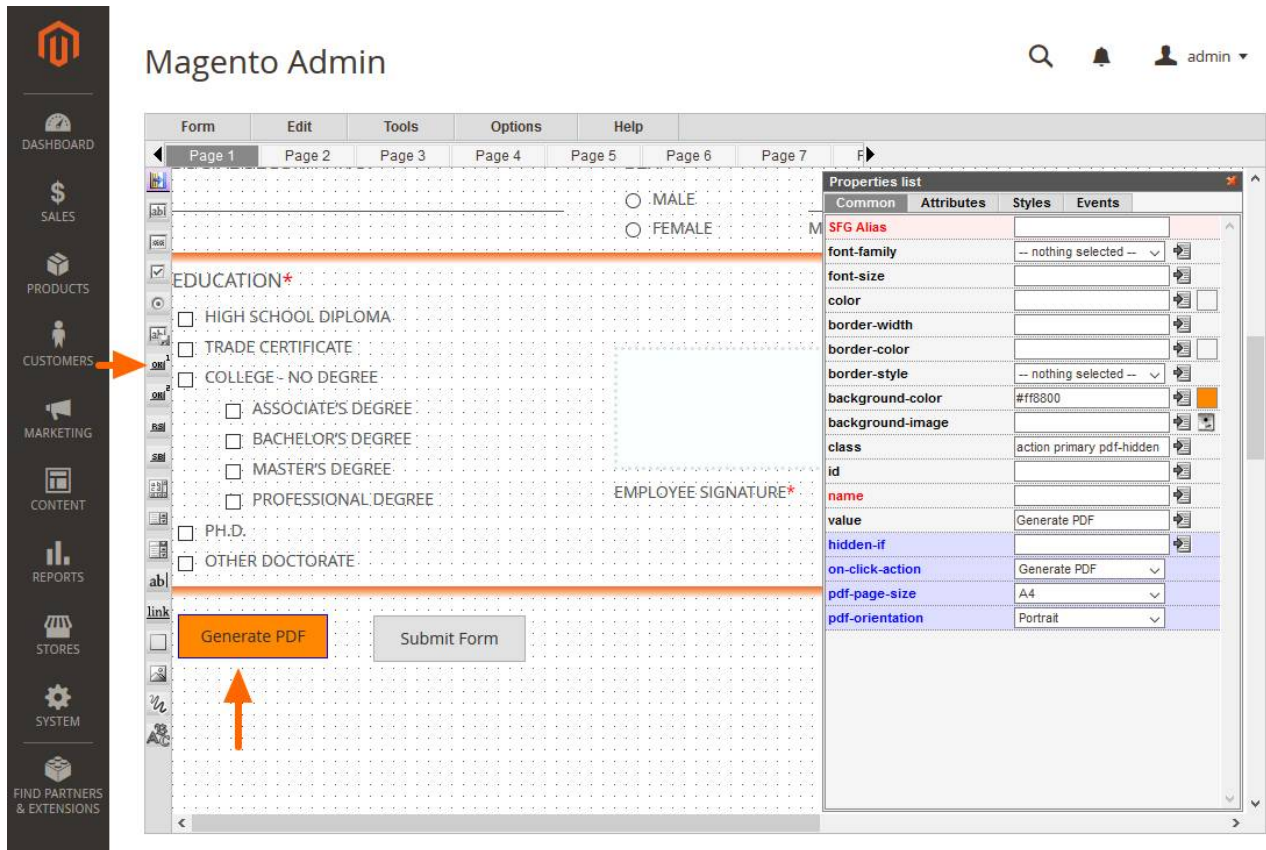
The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. An orange arrow points from the 'Customers' icon to the main content area. The main content area is titled 'Magento Admin' and contains a form with fields for Name, Email, Message, Upload File, Country, State, Province, Company, and Phone. The 'Upload File' field has a 'Browse...' button and the text 'No file selected.'. An orange arrow points to this field. On the right side of the form is a 'Properties list' panel with tabs for Common, Attributes, Styles, and Events. The 'Common' tab is active, showing a list of properties including SFG Alias, font-family, font-size, color, border-width, border-color, border-style, background-color, background-image, class, id, name, and hidden-if. The 'hidden-if' property is highlighted in blue.



#### 4.2.3.6 Button Type 1

Button Type 1 provides the following properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.



**On-click-action** – displays actions that should be performed after the button is submitted. The first-level options are as follow (depending on the selection the new sub-options will be available):

- **Do nothing** – users stay on the current page
- **Submit the form** – sends the users' information to the server if it is valid

**Save-data** – entered data will be saved in the Database

**Disable-validation** – the validation of entered data can be disabled

**After-submit** – provides the following list of actions to be performed after submission:

- **Open next page** – opens the next page of the created form
- **Open previous page** – opens the previous page of the form

- **Open selected page** – the option makes one more field available for choosing a certain page
- **Stay on current page** – stays on the submitting page
- **Redirect to URL** – the option makes one more field available for entering a specified URL

**Email-to-admin** – provides the following information where data will be emailed to admin after submission:

- **Admin-email** – Admin's email address(es) are to be entered here. Several addresses should be comma- or semicolon-separated
- **Admin-email-template** – provides the list of available email templates that can be edited following **Tools -> Email Templates**. By default they are:
  - **Email to user**
  - **Email to admin**
  - **Your custom email**

**Email-to-user** – provides the following information where results are to be send to user after submission:

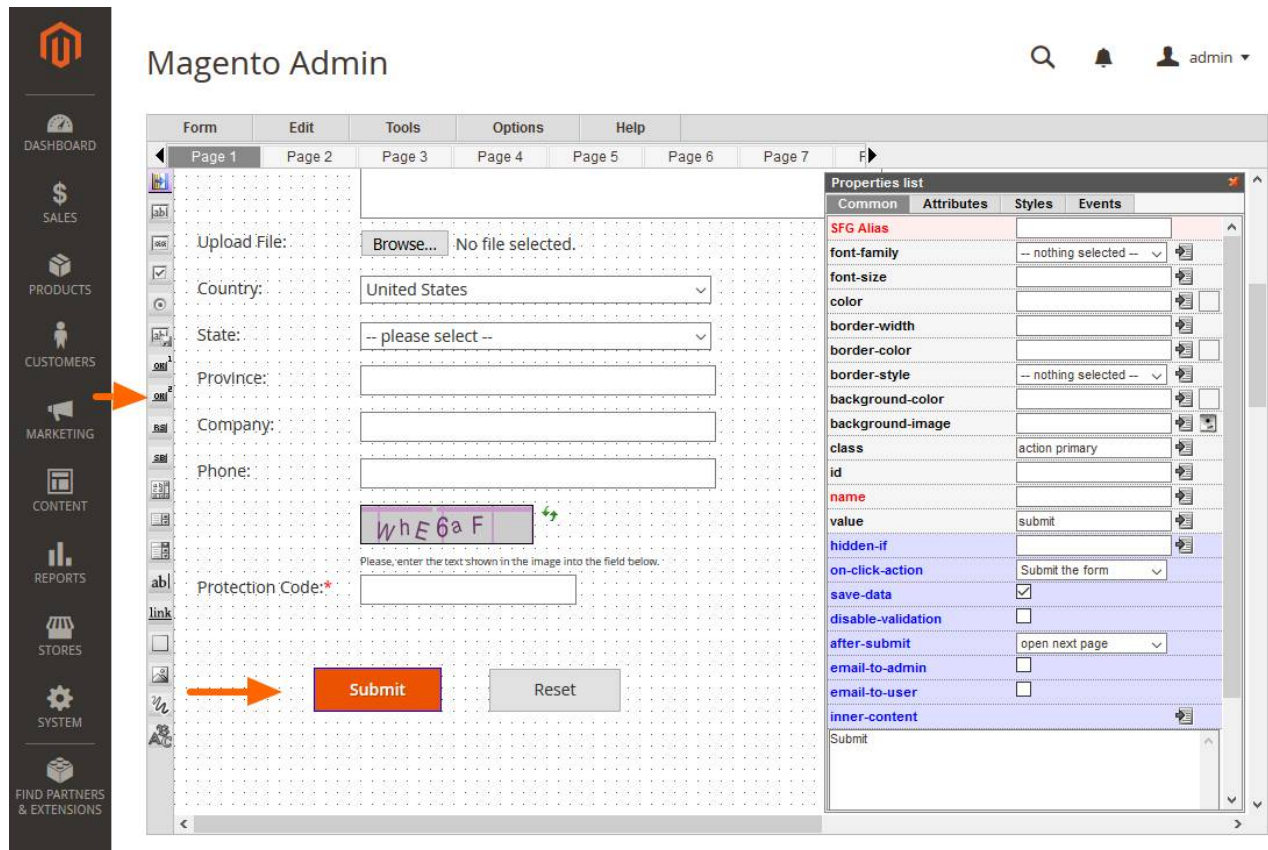
- **user-email-addr-field** – shows fields where the users are to add email address
- **user-email-template** – provides the list of available email templates
- **Show Calendar** – displays the calendar
  - **Date-input-field** – shows fields where the calendar will be available for users
  - **Date-format:**
    - **mm/dd/y**
    - **mm/dd/yy**
    - **dd/mm/y**
    - **dd/mm/yy**
    - **y-mm-dd**
- **Generate PDF** – creates the PDF file and saves it locally:
  - **pdf-page-size** – provides the following PDF page sizes:
    - **A4**
    - **A3**
    - **A2**
    - **Letter**
    - **Legal**
    - **Ledger**
    - **Tabloid**

- **Executive**
- **Folio**
- **pdf-orientation** – provides the following types of PDF orientation:
  - **Portrait**
  - **Landscape**
- **Run custom JS line** – indicates the entered behavior, when the user clicks on the element.
  - **custom-js-line** – the JavaScript line is entered here

#### 4.2.3.7 Button Type 2

The Button Type 2 provides the following properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.



**On-click-action** – for more information see Chapter 4.3.2.6 Button Type 1

**Inner-content** – this particular type of button allows to change the button's HTML content. The PHP editor can be used to generate the content dynamically.

#### 4.2.3.8 Reset Button

"Reset Button" is used to clear the entered data on the form without reloading a page.

The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with navigation icons and labels: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area is titled "Magento Admin" and features a top navigation bar with tabs: Form, Edit, Tools, Options, and Help. Below the tabs are page indicators from Page 1 to Page 7. The central form contains several input fields: "Upload File:" with a "Browse..." button, "Country:" with a dropdown menu set to "United States", "State:" with a dropdown menu set to "-- please select --", "Province:", "Company:", and "Phone:". Below these is a CAPTCHA image showing the text "WhE6aF" and a "Protection Code:" field. At the bottom of the form are two buttons: "Submit" (orange) and "Reset" (blue). An orange arrow points from the "Reset" button to the right sidebar. The right sidebar, titled "Properties list", contains a table with columns: Common, Attributes, Styles, and Events. The table lists various properties for "SFG Alias", including font-family, font-size, color, border-width, border-color, border-style, background-color, background-image, class, id, name, and value. The "value" for "name" is "Reset".

#### 4.2.3.9 Submit Button

The Submit Button element allows to submit the form.

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.

For more information, please see Chapter 4.2.3.6 Button Type 1

The screenshot displays the Magento Admin interface. On the left is a sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main area shows a form editor with a grid of checkboxes for educational qualifications: HIGH SCHOOL DIPLOMA, TRADE CERTIFICATE, COLLEGE - NO DEGREE, ASSOCIATE'S DEGREE, BACHELOR'S DEGREE, MASTER'S DEGREE, PROFESSIONAL DEGREE, PH.D., and OTHER DOCTORATE. Below these is a 'Submit' button. The 'Properties list' panel on the right shows various attributes for the selected element, including 'hidden-if', 'save-data', 'disable-validation', 'after-submit', 'email-to-admin', and 'email-to-user'. An orange arrow points to the 'Submit' button, and another orange arrow points to the 'hidden-if' property in the Properties list.



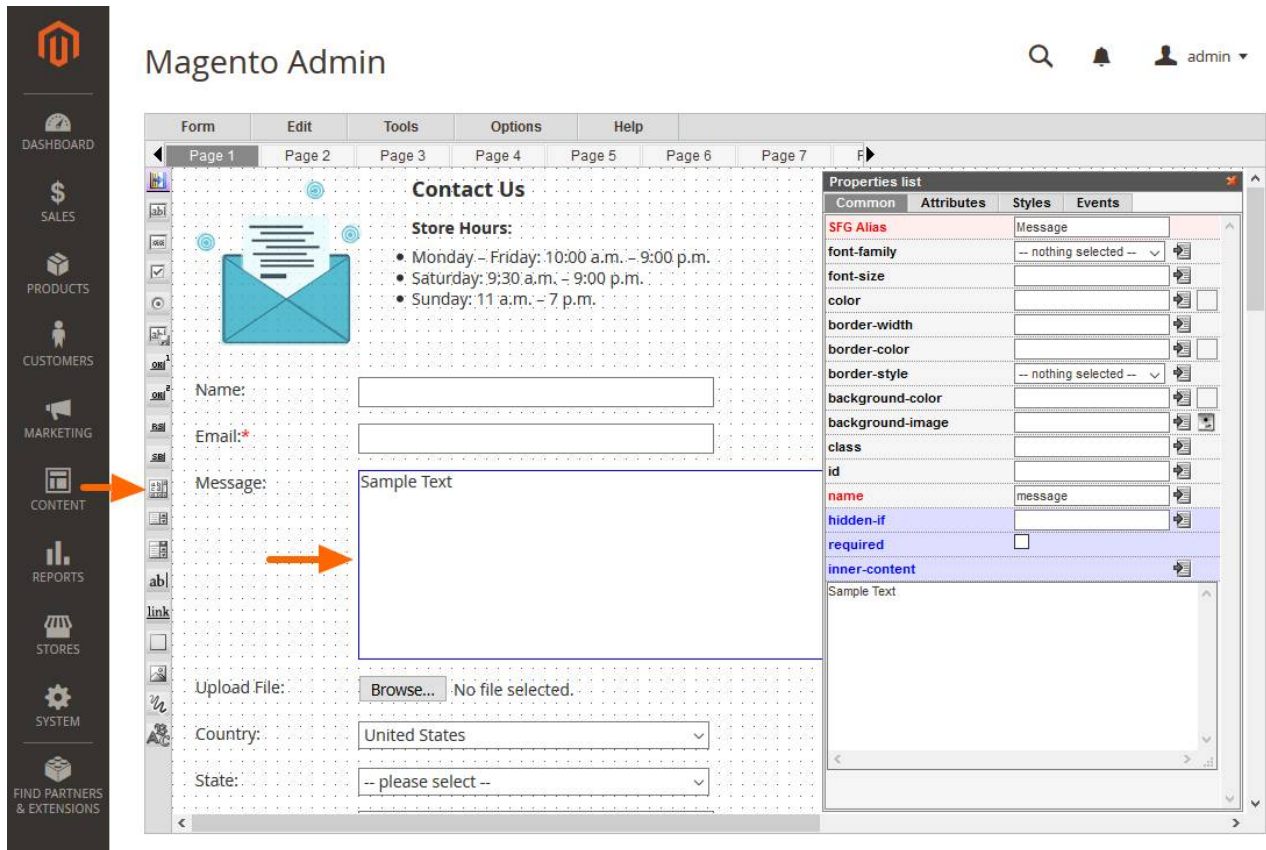
#### 4.2.3.10 Text Area

The "Text Area" element provides the following properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.

**Required** – makes the element required or optional.

**Inner-content** – allows to change the default inner content of the textarea.



#### 4.2.3.11 Select Box

The "Select Box" element provides the following properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.

**Required** – makes the element required or optional.

**Select-list** – allows to enter the list of the dropdown options. Options should be entered one per row in the following format: `[*] [value] ] text`

Example 1:

```
-- Please select --
*United States
Canada
United Kingdom
```

#### Example 2:

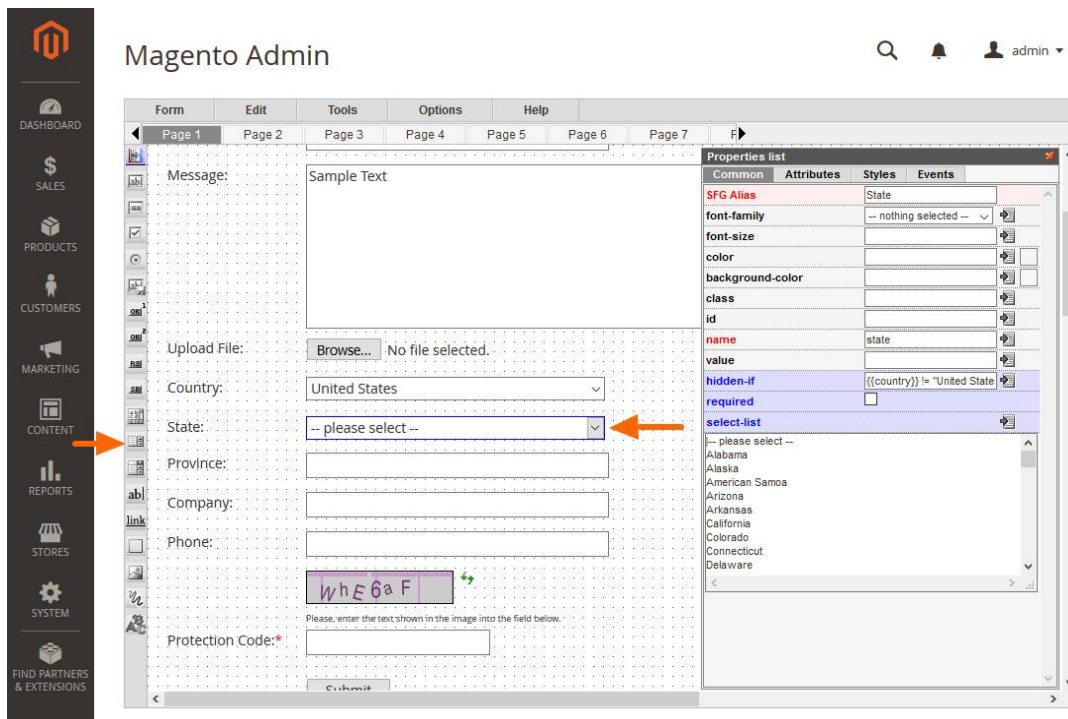
```
0|-- Please select --
1|US
*2|Canada
3|UK
```

#### Example 3:

```
|-- Please select --
US|United States
CA|Canada
UK|United Kingdom
```

The asterisk (\*) used in the beginning of a line means option is selected by default.

If line has a vertical bar (|) that means you want to separate the value and the visible option text. User sees the option text, while the value is saved in the database and displayed in the email. If you want the value and the visible text be the same do not use the vertical bar (see Example 1 above).



#### 4.2.3.12 List Box

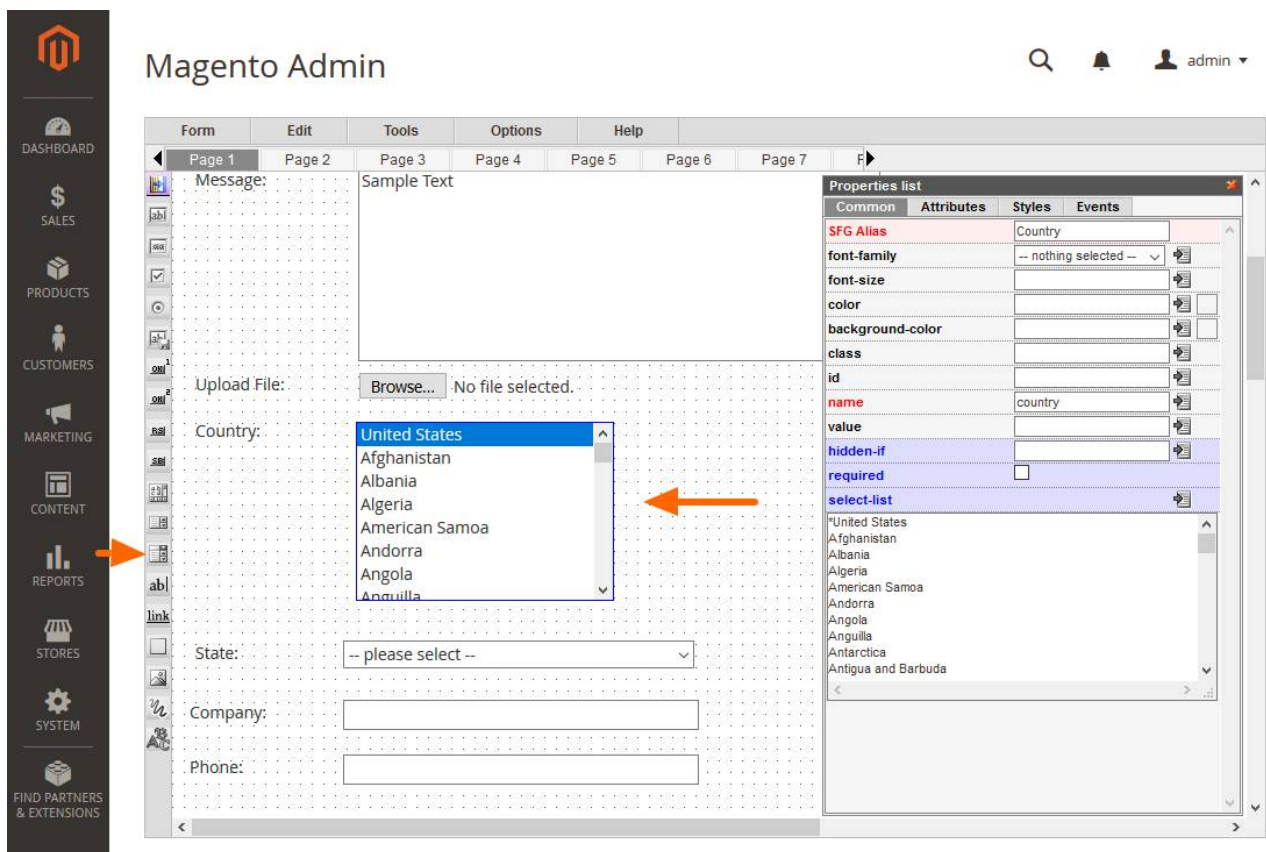
The "List Box" element provides the following properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.

**Required** – makes the element required or optional.

**Select-list** – allows to enter the list of the dropdown options. Options should be entered one per row. See Chapter "4.2.3.11 Select Box" for the format.

To make the multiple choice available select attribute "multiple" in the properties and add 2 brackets [] at the end of the Name. For example, favourite\_food[[]].





#### 4.2.3.13 Static Text

"Static Text" has the following properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.

**Rich-text** – the HTML content of the static text field. You can click the "Show WYSIWYG" icon next to the property to open the Rich-text helper in a popup.

Magento Admin

Form Edit Tools Options Help

Page 1 Page 2 Page 3 Page 4 Page 5 Page 6 Page 7

Search Products Request a Quote Quote Sent

Request For a Quote

Search products by name or SKU: Search Prod

Please search above

Properties list

Common	Attributes	Styles	Events
SFG Alias			
font-family	-- nothing selected --		
font-size	18px		
color			
border-width			
border-color			
border-style	-- nothing selected --		
background-color			
background-image			
class			
id			
hidden-if			
rich-text			

<b>Request For a Quote</b>

#### 4.2.3.14 Link

The "Link" element has the following properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.

**On-click-action** – please see chapter 4.2.3.6 Button Type 1.

**Inner-html** – allows to change the inner HTML of the link element. Click icon "Show HTML Editor" to open the HTML helper in a popup. See "Chapter 4.2.6.7 HTML Editor" for the main features.

Attribute "href" specifies the link's destination.

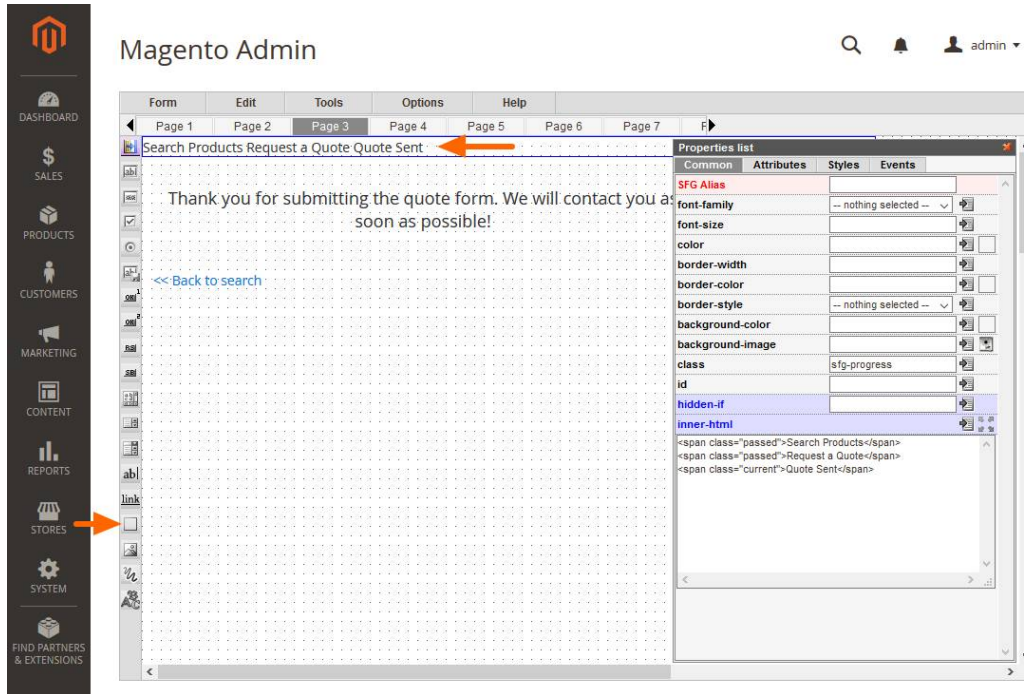
The screenshot displays the Magento Admin interface. On the left is a sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main area shows a form editor for a message: "Thank you for submitting the quote form. We will contact you as soon as possible!". Below this text is a link element labeled "<< Back to search". An orange arrow points to this link. On the right side, the "Properties list" panel is open, showing various properties for the selected link element. The properties include SFG Alias, font-family, font-size, color, border-width, border-color, border-style, background-color, background-image, class, id, name, href (set to {{form\_url}}), hidden-if, on-click-action (set to do nothing), and inner-html (set to << Back to search).

Common	Attributes	Styles	Events
SFG Alias			
font-family		-- nothing selected --	
font-size			
color			
border-width			
border-color			
border-style		-- nothing selected --	
background-color			
background-image			
class			
id			
name			
href		{{form_url}}	
hidden-if			
on-click-action		do nothing	
inner-html			

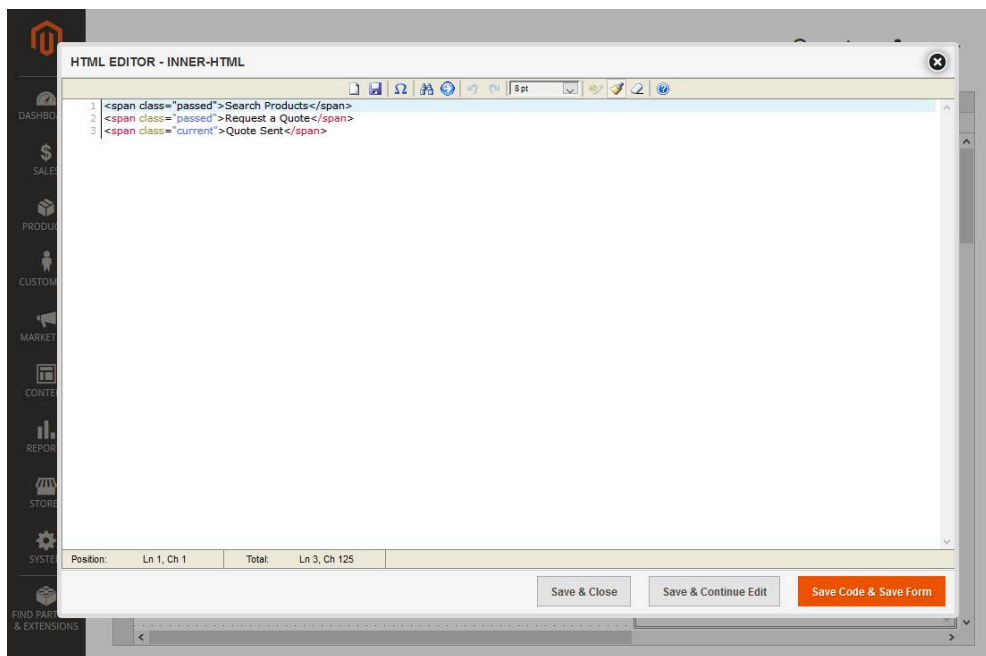
#### 4.2.3.15 DIV Element

"DIV Element" provides the following properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.



**Inner-html** – HTML content of the DIV. Click the "Show HTML editor" icon next to the property to open the HTML helper in a popup.



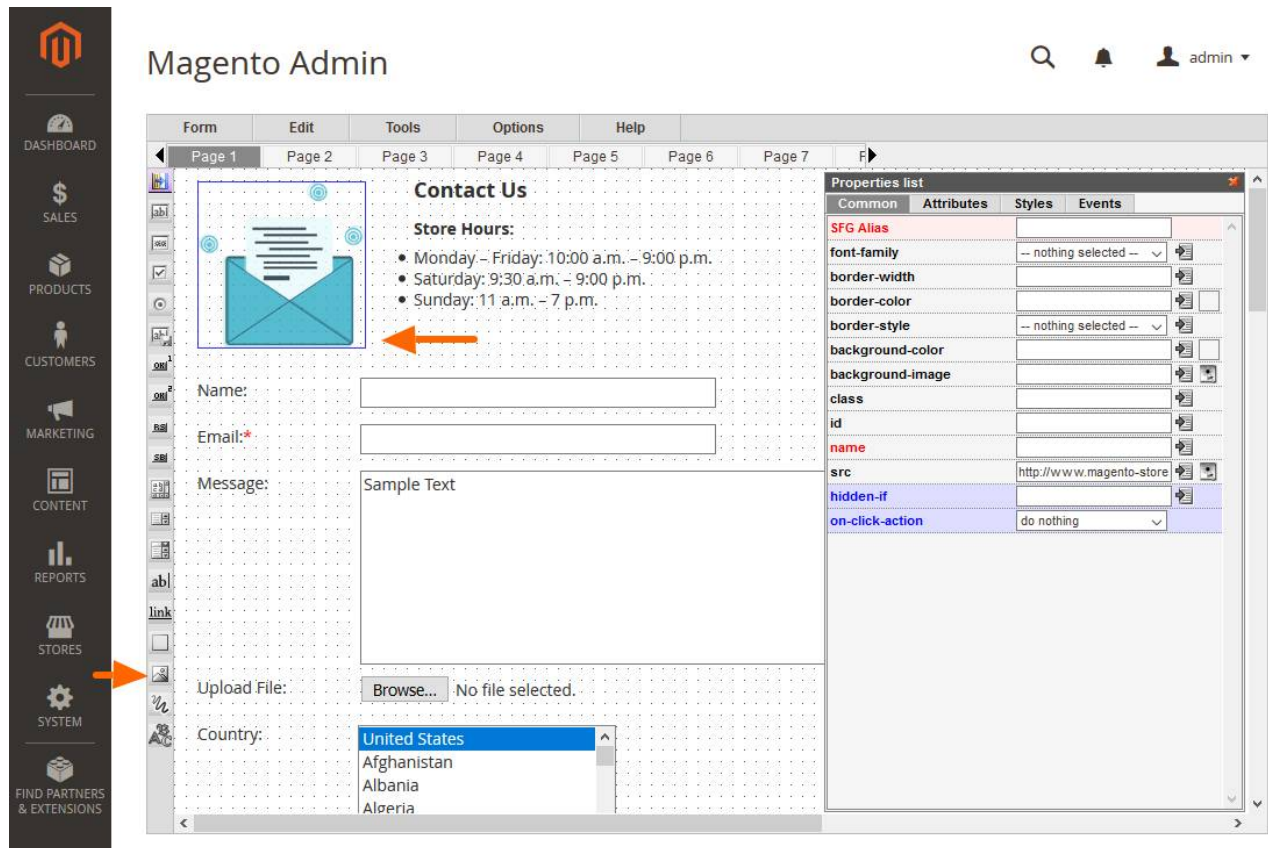
#### 4.2.3.16 Image

The "Image" element can be used as a picture adding a background to the form, or it can be used as link or button. The element provides the following properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.

**On-click-action** – please see Chapter "4.2.3.6 Button Type 1".

The URL of the image can be specified in attribute "src". Click icon "Select Image" next to the property to open the image selector in a popup. It allows to browse images located in folder /pub/media/ of the server. It also allows to upload your own image file and pick up its URL.





#### 4.2.3.17 Drawing Canvas/Digital Signature

Except for ability of drawing pictures, this particular element adds digital signature functionality to forms. No special tools for signing are required. Once the signature is created, it is converted into image and can be inserted in the body of email templates. It can be saved in Database as well.

The element has the following properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.

**Required** – makes the element required or optional.

**Canvas-pen-size** – specifies the default size of the pen.

**Canvas-pen-color** – specifies the default color of the pen.

**Canvas-background-color** – specifies the background color of the whole canvas.

You can also use style "background-image" to place an image behind the drawing canvas.

The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with navigation icons and labels: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM (highlighted with an orange arrow), and FIND PARTNERS & EXTENSIONS. The main area is titled 'Magento Admin' and contains a form editor. At the top of the form editor are tabs: Form, Edit, Tools, Options, and Help. Below these are page tabs labeled Page 1 through Page 7. A 'Properties list' window is open, showing a table of properties for the 'Signature' element. The properties are organized into 'Common', 'Attributes', 'Styles', and 'Events' sections. The 'Attributes' section is currently selected, showing properties like font-family, font-size, color, border-width, border-color, border-style, background-color, background-image, class, id, name, hidden-if, required, canvas-pen-size, canvas-pen-color, and canvas-background-color. The 'required' property is checked, and 'canvas-pen-size' is set to 2. The 'canvas-pen-color' is set to #000000, and 'canvas-background-color' is set to #FAFFFF. An orange arrow points from the 'SYSTEM' menu item to the 'Properties list' window. Another orange arrow points from the 'canvas-background-color' property to a light blue rectangular canvas area on the form, which is labeled 'EMPLOYEE SIGNATURE\*'.

Property	Value
SFG Alias	Signature
font-family	-- nothing selected --
font-size	
color	
border-width	
border-color	
border-style	-- nothing selected --
background-color	#FAFFFF
background-image	
class	
id	
name	signature
hidden-if	
required	<input checked="" type="checkbox"/>
canvas-pen-size	2
canvas-pen-color	#000000
canvas-background-color	#FAFFFF

#### 4.2.3.18 Captcha Image

The "Captcha Image" element allows to protect the form against unwanted submissions made by automated robots. The user should correctly enter the random text shown in the image before submitting the form.

The element provides the following properties:

**Hidden-if** – the property allows to apply the conditional branching, when one element depends on another one. The property provides the PHP editor for advanced use.

**Captcha-type** – the three types are available:

- **Alikon Mod**
- **Captcha Form**
- **SecurImage**

**Captcha-length** – specifies a number of symbols in CAPTCHA.

**Captcha-symbols** – specifies the allowed symbols for CAPTCHA.

**Captcha-field** – specifies an edit box where users should enter the symbols from.

The screenshot displays the Magento Admin interface. On the left, the 'SYSTEM' menu item is highlighted with an orange arrow. The main content area shows a form with fields for 'Country', 'State', 'Province', 'Company', and 'Phone'. Below these is a 'Protection Code' field with a captcha image showing the text 'WhE6aF'. An orange arrow points to the captcha image. The right sidebar shows the 'Properties list' for the 'captcha\_image' element, with properties like 'font-family', 'border-width', 'border-color', 'border-style', 'background-color', 'background-image', 'class', 'id', 'name', 'hidden-if', 'captcha-type', 'captcha-length', 'captcha-symbols', and 'captcha-field'.

#### 4.2.4 Snippets

There are groups of elements that are usually used together. Snippets or ready-to-use forms simplify the process of creating standard forms. Such groups are commonly used.

These elements can be added one by one, or as the group in the Snippets. At the top of the HTML Elements there is a list of available snippets. Snippets are added to the form in the same way as the rest of elements. Drag-and-drop the chosen snippet to the working area. All properties can be changed per each snippet.

##### 4.2.4.1 Optional Input Box with Title

"Input box with Title" is optional and includes the following elements:

- Static Text
- Input Box

The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main header shows 'Magento Admin' with search, notification, and user icons. Below the header is a tabbed interface with 'Form', 'Edit', 'Tools', 'Options', and 'Help' tabs. The 'Form' tab is active, showing a list of snippets. The 'Input box with Title' snippet is highlighted with an orange border and an orange arrow. The snippet preview shows a 'Title:' label followed by an input field. Other snippets listed include 'Required Input box with Title', 'Required Password Box', 'Required Confirm Password Box', 'Set of Checkboxes (variant 1)', 'Set of Checkboxes (variant 2)', 'Set of Radio Buttons (variant 1)', 'Set of Radio Buttons (variant 2)', and 'File Upload with Title'.

#### 4.2.4.2 Required Input Box with Title

"Required Input box with Title" includes the following required elements:

- Static Text
- Input Box

The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The top navigation bar includes a search icon, a notification bell, and a user profile dropdown labeled 'admin'. The main content area is titled 'Snippets' and contains a list of snippet types. The 'Required Input box with Title' snippet is highlighted with an orange border. This snippet includes a 'Title:' label and a required input field. Other snippet types visible include 'Required Password Box', 'Required Confirm Password Box', 'Set of Checkboxes (variant 1)', 'Set of Checkboxes (variant 2)', 'Set of Radio Buttons (variant 1)', 'Set of Radio Buttons (variant 2)', and 'File Upload with Title'.



#### 4.2.4.3 Required Password Box

"Required Password Box" includes the following required elements:

- **Static Text**
- **Password**

The screenshot displays the Magento Admin dashboard. On the left is a vertical sidebar with icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main area is titled 'Magento Admin' and contains a 'Snippets' section. Within this section, the 'Required Password Box' snippet is highlighted with an orange rectangular box. An orange arrow points from the right side of the page towards this highlighted snippet. The snippet itself contains a 'Password: \*' label followed by a text input field. Below it is a 'Required Confirm Password Box' with a 'Confirm Password: \*' label and another text input field. Further down are sections for 'Set of Checkboxes (variant 1)', 'Set of Checkboxes (variant 2)', 'Set of Radio Buttons (variant 1)', and 'Set of Radio Buttons (variant 2)', each with a 'Group Name' label and three choice options. At the bottom is a 'File Upload with Title' section with a 'Browse...' button and the text 'No file selected.'.

#### 4.2.4.4 Required Confirm Password Box

"Required Confirm Password Box" includes the following required elements:

- **Static Text**
- **Password** with the specified "equal-to" property

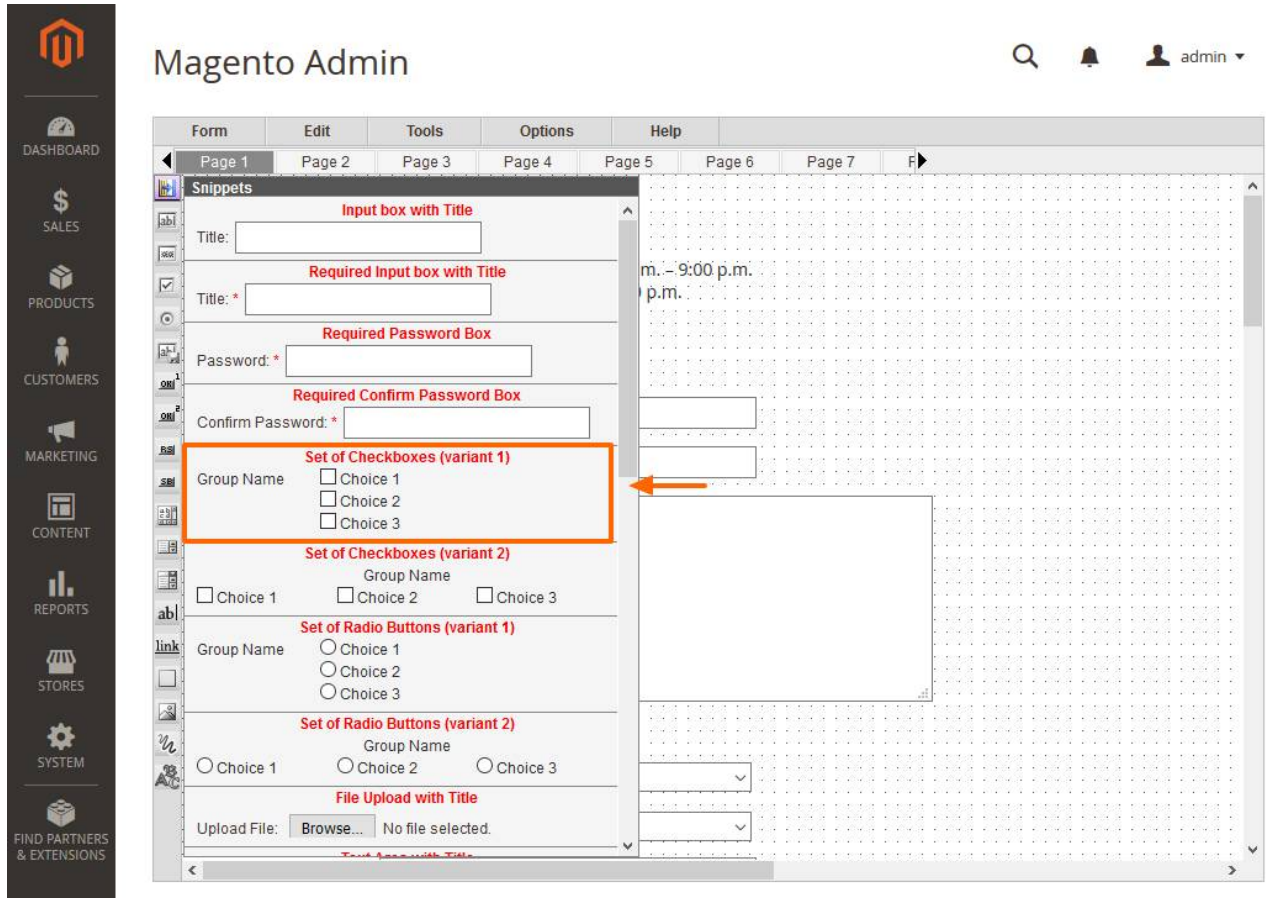
The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main area is titled 'Magento Admin' and contains a 'Snippets' section. Within this section, the 'Required Confirm Password Box' snippet is highlighted with an orange rectangular box. An orange arrow points from the right side of the page towards this highlighted snippet. The snippet itself contains a 'Confirm Password: \*' label followed by a text input field. Other snippets visible include 'Input box with Title', 'Required Input box with Title', 'Required Password Box', 'Set of Checkboxes (variant 1)', 'Set of Checkboxes (variant 2)', 'Set of Radio Buttons (variant 1)', 'Set of Radio Buttons (variant 2)', and 'File Upload with Title'.

#### 4.2.4.5 Optional Set of Checkboxes (variant 1)

There are 2 variants of checkboxes that are structured slightly different.

"Optional Set of Checkboxes (variant 1)" includes the following elements:

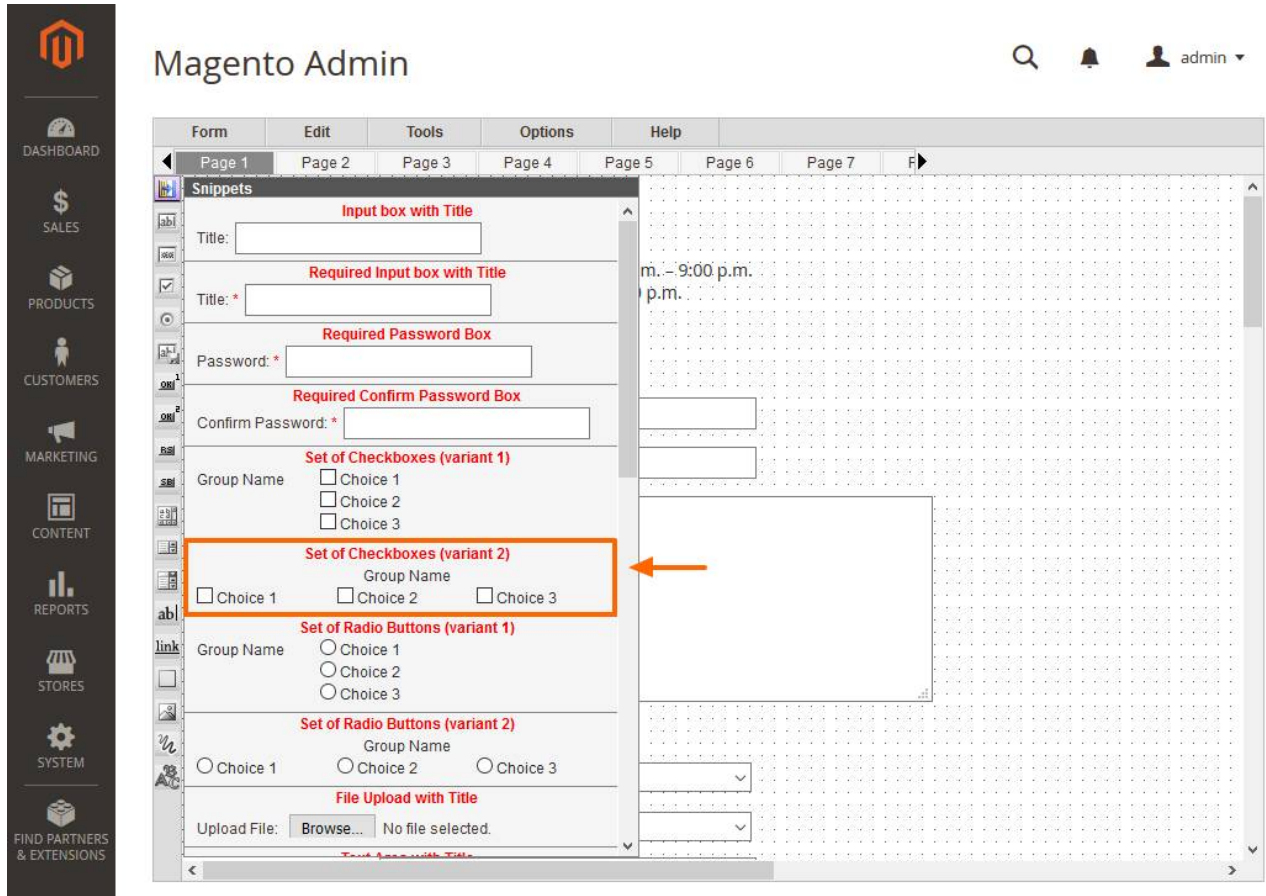
- **Static Text**
- **3 Check Boxes**
- **3 Labels**



#### 4.2.4.6 Optional Set of Checkboxes (variant 2)

"Optional Set of Checkboxes (variant 2)" includes the following elements:

- **Static Text**
- **3 Check Boxes**
- **3 Labels**



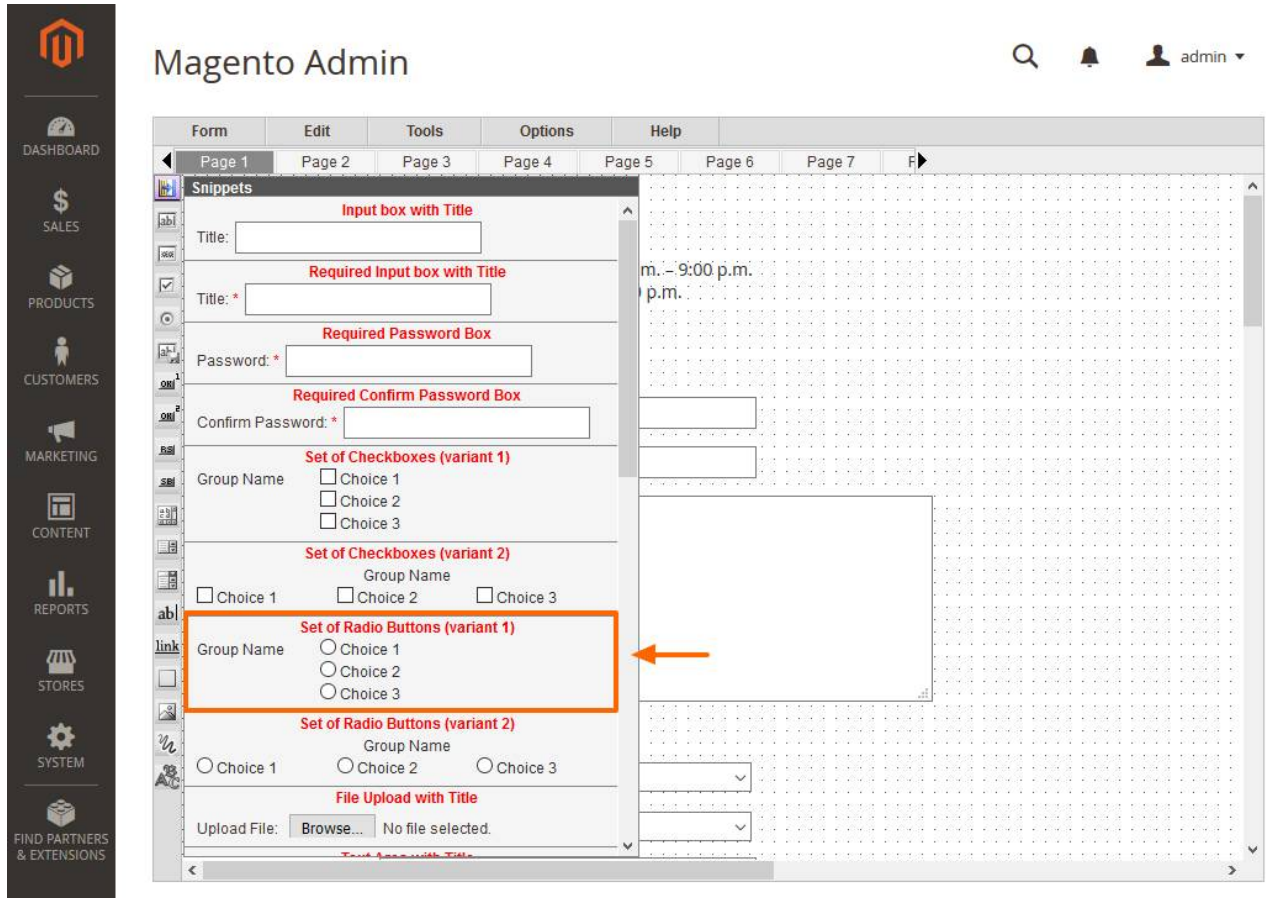
The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Magento Admin' and features a search bar, a notification bell, and a user profile dropdown labeled 'admin'. Below this is a tabbed interface with tabs for Form, Edit, Tools, Options, and Help. The 'Form' tab is active, showing a list of snippets. The 'Set of Checkboxes (variant 2)' snippet is highlighted with an orange box and an arrow. This snippet includes a 'Group Name' label and three checkboxes labeled 'Choice 1', 'Choice 2', and 'Choice 3'. Other snippets visible include 'Input box with Title', 'Required Input box with Title', 'Required Password Box', 'Required Confirm Password Box', 'Set of Checkboxes (variant 1)', 'Set of Radio Buttons (variant 1)', 'Set of Radio Buttons (variant 2)', and 'File Upload with Title'.

#### 4.2.4.7 Optional Set of Radio Buttons (variant 1)

There are 2 variants of radio buttons that are structured slightly different.

"Optional Set of Radio Buttons (variant 1)" includes the following elements:

- **Static Text**
- **3 Radio Buttons**
- **3 Labels**



The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Magento Admin' and shows a 'Snippets' editor. The editor has tabs for Page 1 through Page 7. The 'Page 1' tab is active, showing a list of snippets. The snippet titled 'Set of Radio Buttons (variant 1)' is highlighted with an orange box. An orange arrow points to this snippet. The snippet content includes a 'Group Name' label and three radio buttons labeled 'Choice 1', 'Choice 2', and 'Choice 3'. Other snippets visible include 'Input box with Title', 'Required Input box with Title', 'Required Password Box', 'Required Confirm Password Box', 'Set of Checkboxes (variant 1)', 'Set of Checkboxes (variant 2)', 'Set of Radio Buttons (variant 2)', and 'File Upload with Title'.



#### 4.2.4.8 Optional Set of Radio Buttons (variant 2)

"Optional Set of Radio Buttons (variant 2)" includes the following elements:

- **Static Text**
- **3 Radio Buttons**
- **3 Labels**

The screenshot displays the Magento Admin interface. On the left is a sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Magento Admin' and shows a 'Snippets' section. The 'Set of Radio Buttons (variant 2)' snippet is highlighted with an orange box. It contains a 'Group Name' label and three radio buttons labeled 'Choice 1', 'Choice 2', and 'Choice 3'. An orange arrow points to the 'Choice 2' radio button. Other snippets visible include 'Input box with Title', 'Required Input box with Title', 'Required Password Box', 'Required Confirm Password Box', 'Set of Checkboxes (variant 1)', 'Set of Checkboxes (variant 2)', 'Set of Radio Buttons (variant 1)', and 'File Upload with Title'.

#### 4.2.4.9 Optional File Upload with Title

"Optional File Upload with Title" includes the following elements:

- **Static Text**
- **File Upload**

The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Magento Admin' and shows a 'Snippets' section. The 'File Upload with Title' snippet is highlighted with an orange box and an arrow. This snippet contains a 'Browse...' button, a 'No file selected.' message, and a 'Text Area with Title'. Other snippets visible include 'Text Area with Title', 'Select Box with Title', 'List Box with Title', 'Calendar box with Title', 'Captcha with Input Field', and 'Digital Signature'.

#### 4.2.4.10 Optional Text Area with Title

"Optional Text Area with Title" includes the following elements:

- **Static Text**
- **Text Area**

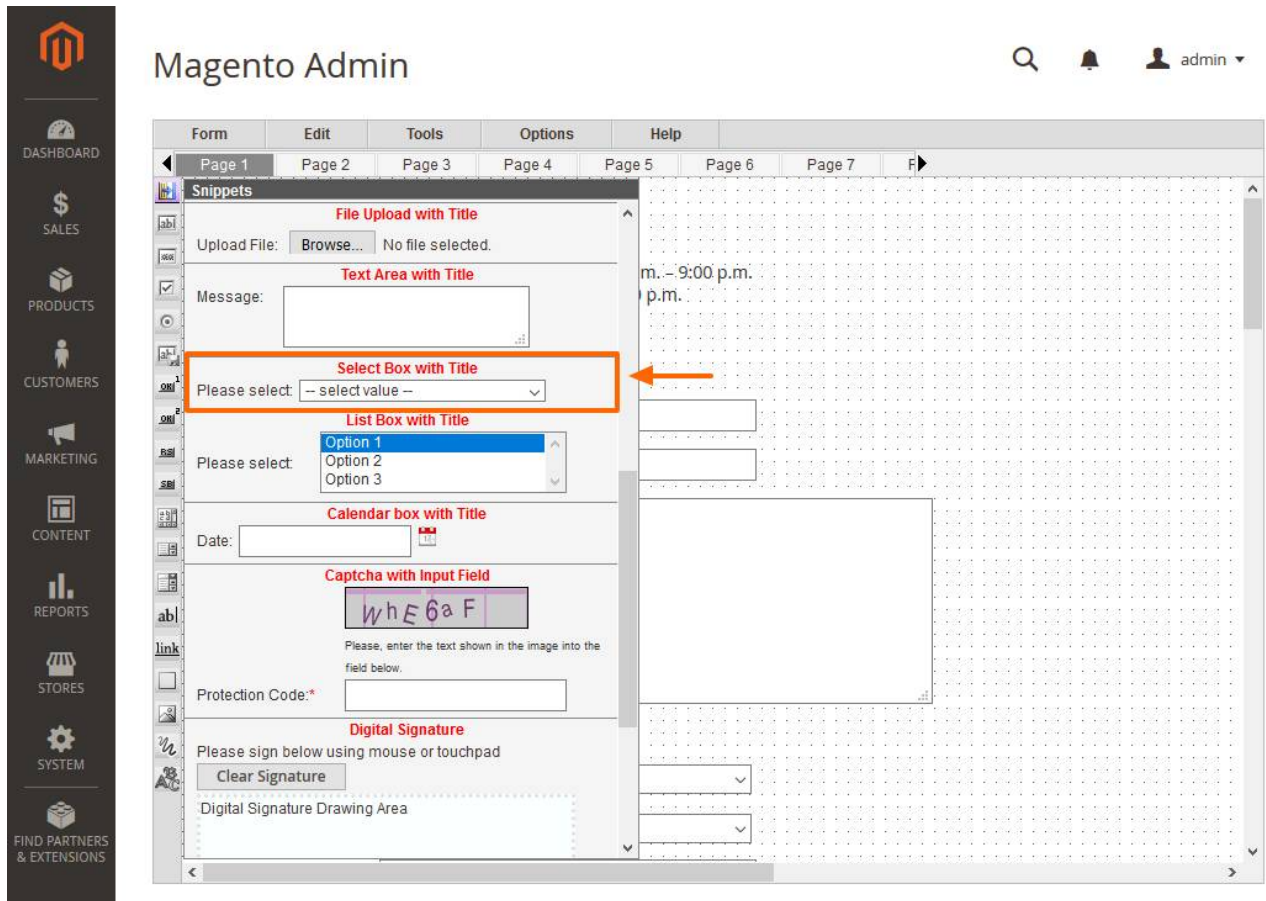
The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Magento Admin' and shows a 'Snippets' section. The 'Text Area with Title' snippet is highlighted with an orange border. It contains a 'Message' label and a text area. The 'File Upload with Title' snippet is above it, showing 'Upload File: Browse...' and 'No file selected.' The 'Select Box with Title' snippet is below it, showing 'Please select: -- select value --'. The 'List Box with Title' snippet is below that, showing 'Please select: Option 1, Option 2, Option 3'. The 'Calendar box with Title' snippet is below that, showing 'Date:'. The 'Captcha with Input Field' snippet is below that, showing a captcha image with the text 'WhE6aF' and a 'Protection Code\*' input field. The 'Digital Signature' snippet is at the bottom, showing 'Please sign below using mouse or touchpad', a 'Clear Signature' button, and a 'Digital Signature Drawing Area'.



#### 4.2.4.11 Optional Select Box with Title

"Optional Select Box with Title" includes the following elements:

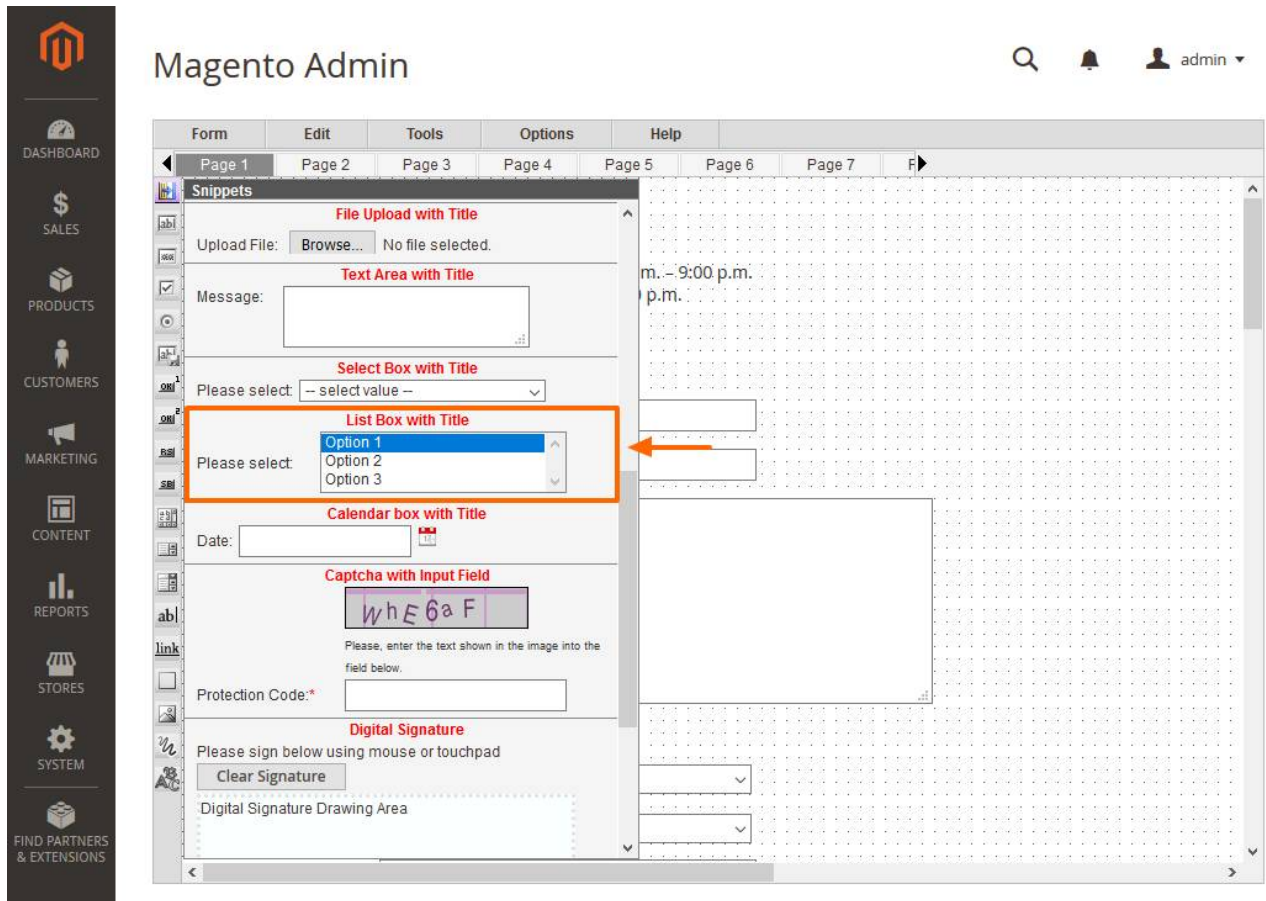
- **Static Text**
- **Select Box**



#### 4.2.4.12 Optional List Box with Title

"Optional List Box with Title" includes the following elements:

- **Static Text**
- **List Box**



#### 4.2.4.13 Optional Calendar box with Title

"Optional Calendar with Title" includes the following elements:

- **Static Text**
- **Input Box**
- **Image**

The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Magento Admin' and features a search bar, a notification bell, and a user profile dropdown labeled 'admin'. Below this is a tabbed interface with tabs for Form, Edit, Tools, Options, and Help. The 'Form' tab is active, showing a list of snippets. The 'Calendar box with Title' snippet is highlighted with an orange border and an arrow pointing to it. This snippet includes a 'Date:' label, a date input field, and a calendar icon. Other visible snippets include 'File Upload with Title', 'Text Area with Title', 'Select Box with Title', 'List Box with Title', 'Captcha with Input Field', and 'Digital Signature'.

#### 4.2.4.14 Required Captcha with Input Field

"Optional Captcha with Input Field" includes the following elements:

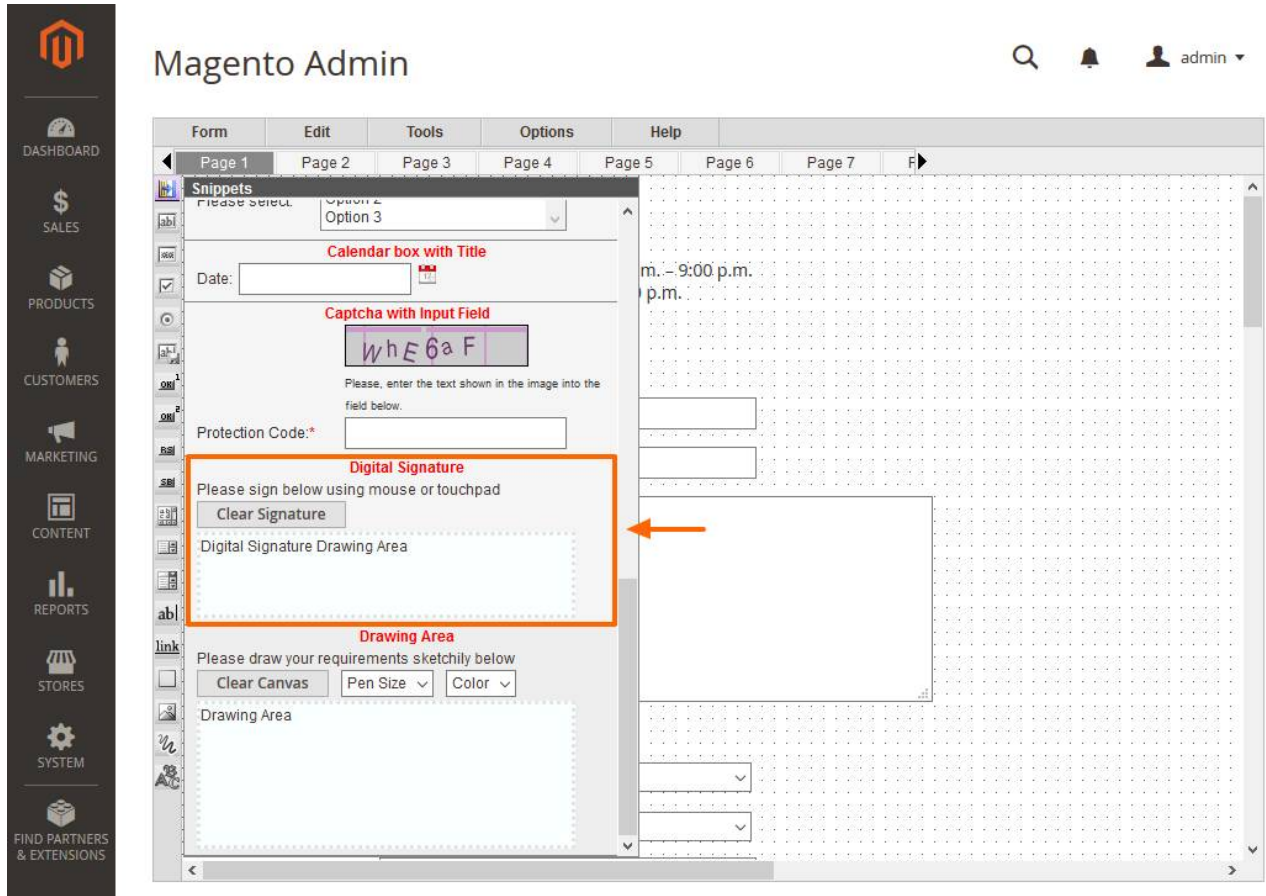
- **Static Text**
- **Input Box**
- **Captcha**
- **Image**

The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with navigation icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main content area is titled 'Magento Admin' and features a search bar, a notification bell, and a user profile dropdown labeled 'admin'. Below the header is a tabbed interface with tabs for Form, Edit, Tools, Options, and Help. The 'Form' tab is active, showing a 'Snippets' section. The 'Captcha with Input Field' snippet is highlighted with an orange box. It contains a file upload section with a 'Browse...' button and 'No file selected.' text. Below this is a 'Text Area with Title' with a text input field. Then a 'Select Box with Title' with a dropdown menu showing '-- select value --'. Next is a 'List Box with Title' with a dropdown menu showing 'Option 1', 'Option 2', and 'Option 3'. Below that is a 'Calendar box with Title' with a date input field. The highlighted 'Captcha with Input Field' section includes a captcha image showing the text 'WHE6aF', a prompt 'Please, enter the text shown in the image into the field below.', and a 'Protection Code:\*' input field. At the bottom is a 'Digital Signature' section with a 'Clear Signature' button and a 'Digital Signature Drawing Area'.

#### 4.2.4.15 Optional Digital Signature

"Optional Digital Signature" includes the following elements:

- **Static Text**
- **DIV Element with button to clear the canvas**
- **Drawing Canvas**

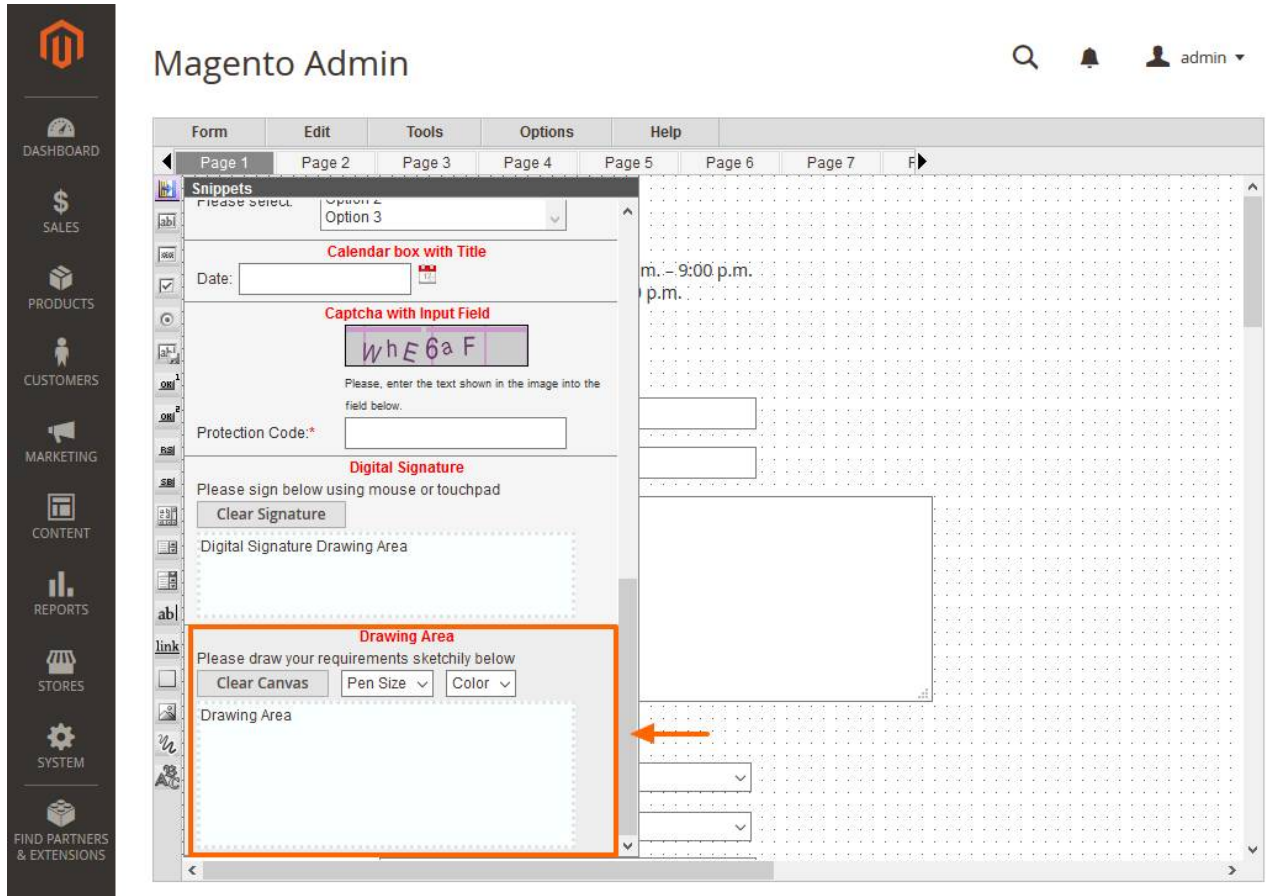




#### 4.2.4.16 Optional Drawing Area

"Optional Digital Signature" includes the following elements:

- **Static Text**
- **DIV Element with drawing panel**
- **Drawing Canvas**



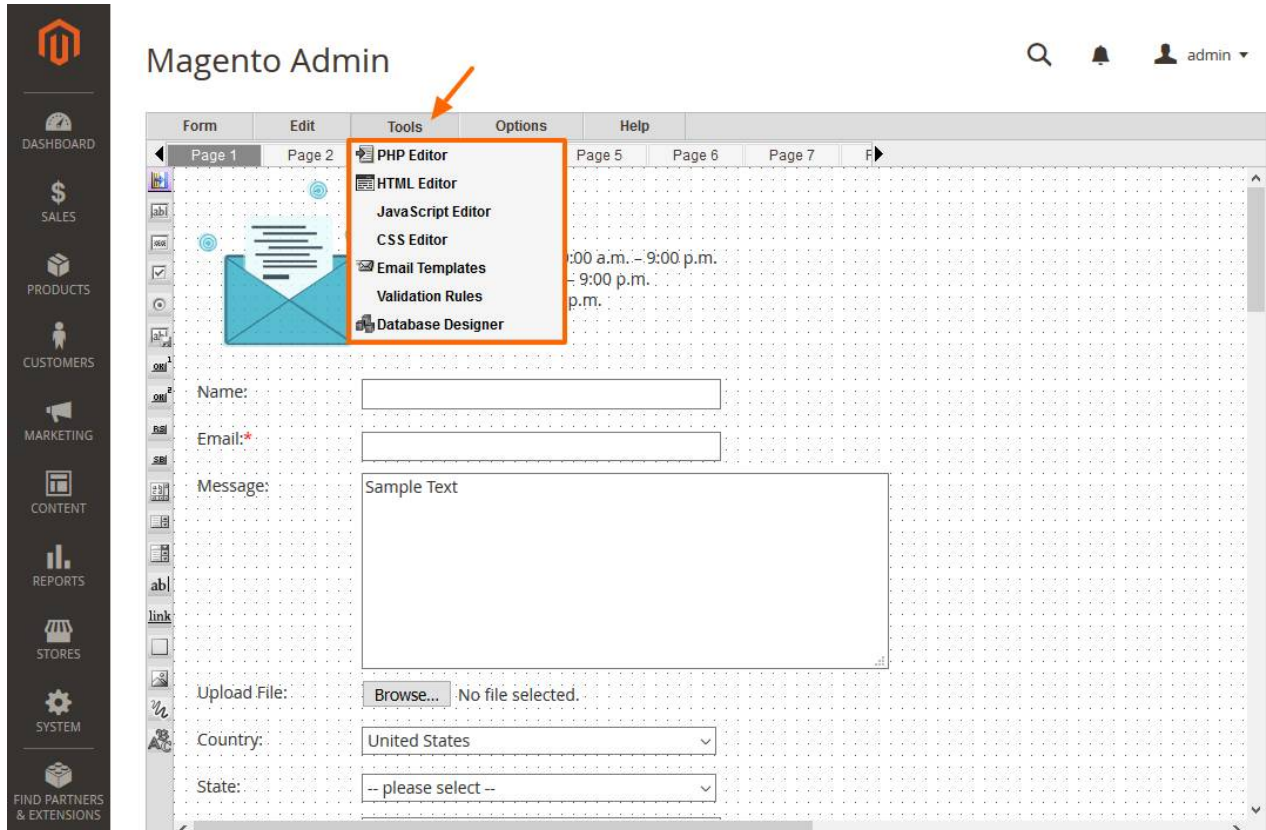


#### 4.2.5 Tools

The extension is designed the way to provide more features for advanced users yet stay simple for beginners. The "Tools" menu contains additional editors for programmers and essential settings such as email notification templates and the database manager.

The advanced PHP editor, HTML editor, JavaScript editor, CSS editor are used to improve the visual part of the form and tune its behavior.

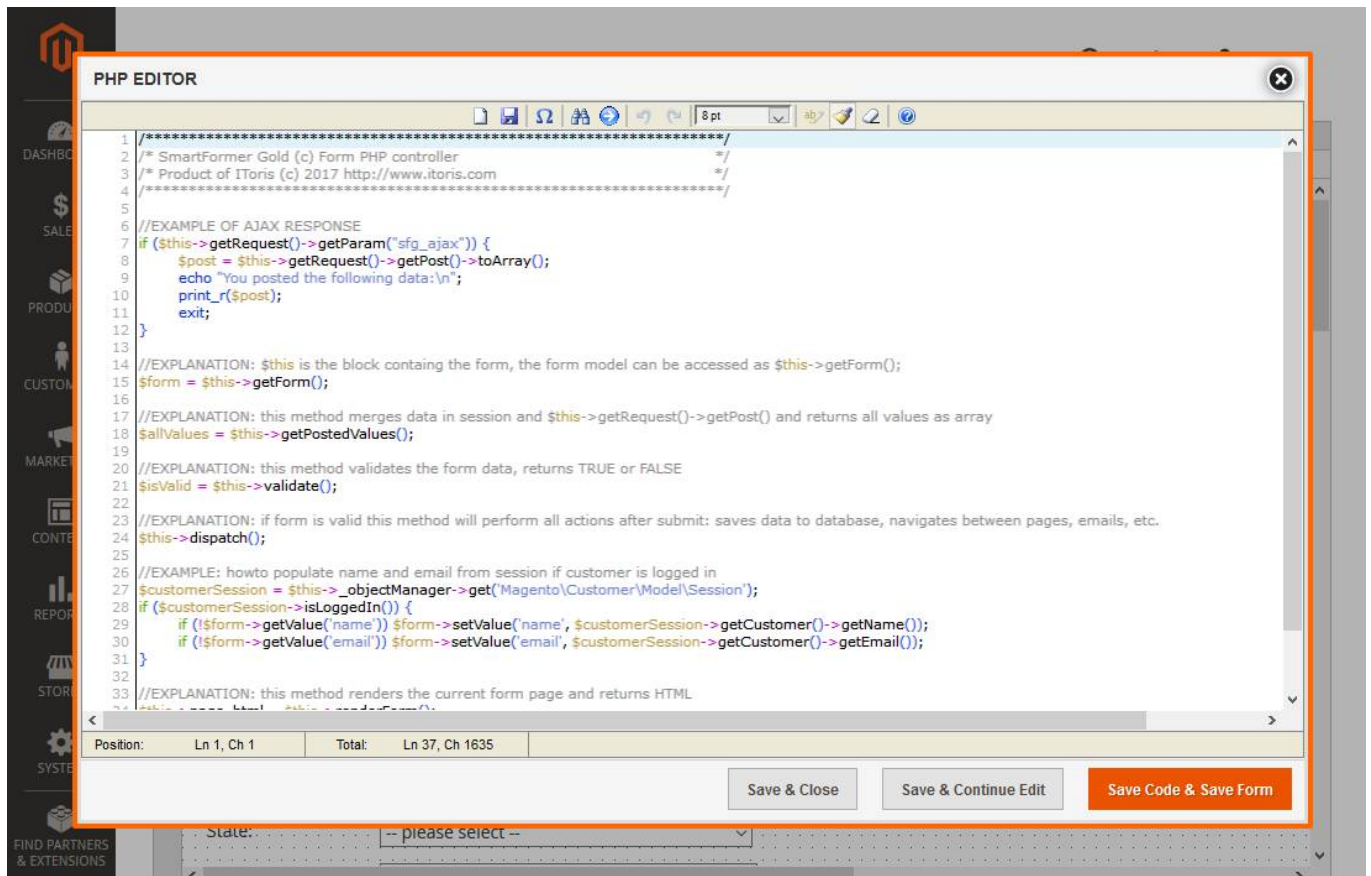
The "Tools" section helps to create different email templates, enable various validation rules, and bind the form to the database.



#### 4.2.5.1 PHP Editor

The PHP editor helps to customize the form's logic depending on input data, adds custom PHP code generating all the form elements.

The editor has its working area showing the quantity of lines and characters. The main options are available in the menu bar.



**New Document** – clears the editor

**Save** – saves the code, the same to the "Save & Continue Edit" button

**Visual Keyboard** – opens a visual keyboard in a popup.

**Search** – searches for entered information or replaces the selected parts of code.

**Go to Line** – scrolls for the entered line.

**Undo** – cancels the previous action.

**Redo** – repeats the previous action.

**Font Size** – changes the text's font size.

**Toggle syntax highlight on/off** - highlights the code syntax

**Reset highlight (if desynchronized from text)** - refreshes the editor area

To save all changes, three options are available:

**Save & Close** – saves all changes and closes the PHP editor

**Save & Continue Edit** – saves all changes and stays on the editing page

**Save Code & Save Form** – saves the code and the current form completely

The following code is written by default:

```
/* **** */
/* SmartFormer Gold (c) Form PHP controller */
/* Product of IToris (c) 2017 http://www.itoris.com */
/* **** */

//EXAMPLE OF AJAX RESPONSE
if ($this->getRequest()->getParam("sfg_ajax")) {
    $post = $this->getRequest()->getPost()->toArray();
    echo "You posted the following data:\n";
    print_r($post);
    exit;
}

//EXPLANATION: $this is the block containing the form, the form model can be accessed as $this->getForm();
$form = $this->getForm();

//EXPLANATION: this method merges data in session and $this->getRequest()->getPost() and returns all values as array
$allValues = $this->getPostedValues();

//EXPLANATION: this method validates the form data, returns TRUE or FALSE
$isValid = $this->validate();

//EXPLANATION: if form is valid this method will perform all actions after submit: saves data to database,
navigates between pages, emails, etc.
$this->dispatch();

//EXAMPLE: howto populate name and email from session if customer is logged in
$customerSession = $this->_objectManager->get('Magento\Customer\Model\Session');
if ($customerSession->isLoggedIn()) {
    if (!$form->getValue('name')) $form->setValue('name', $customerSession->getCustomer()->getName());
    if (!$form->getValue('email')) $form->setValue('email', $customerSession->getCustomer()->getEmail());
}

//EXPLANATION: this method renders the current form page and returns HTML
$this->page_html = $this->renderForm();

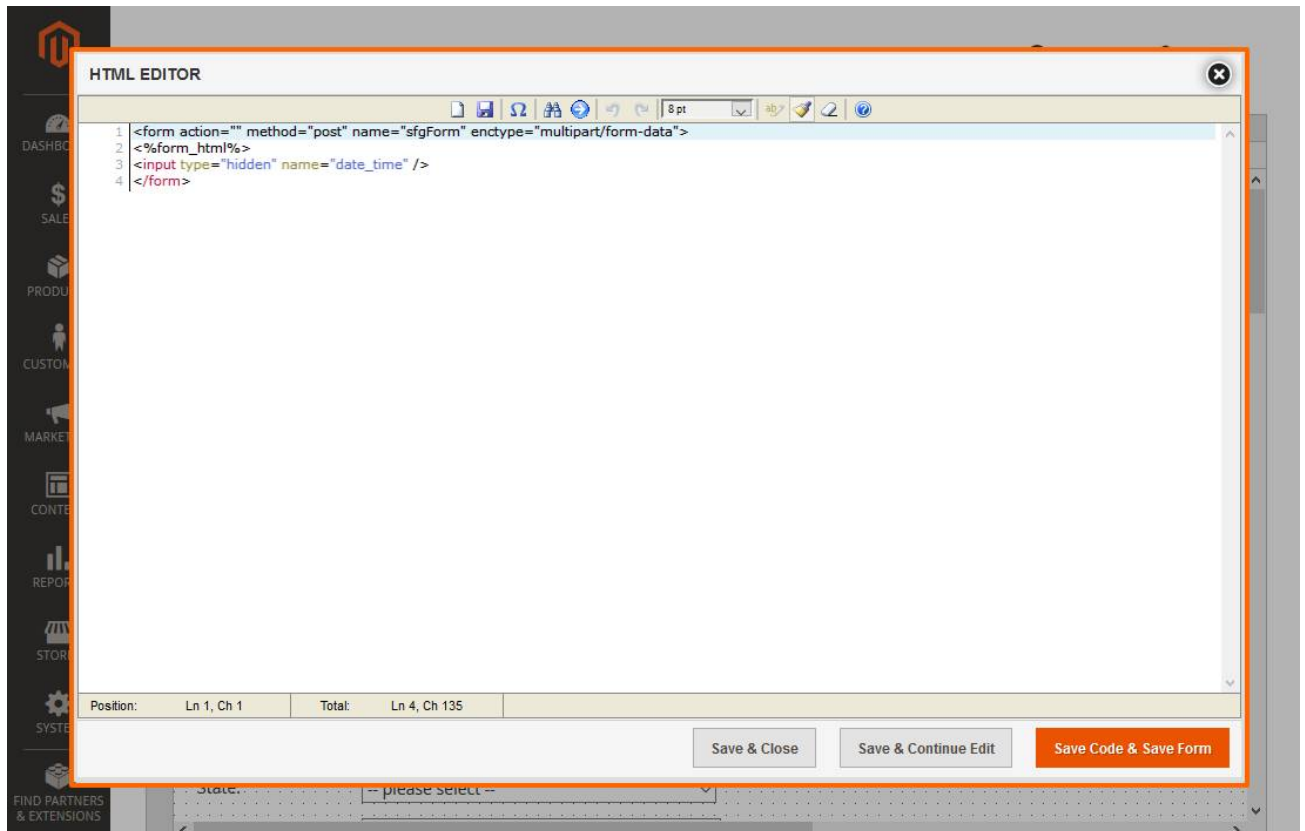
//EXPLANATION: output into the block
echo $this->page_html;
```

#### 4.2.5.2 HTML Editor

The global HTML Editor helps to customize the HTML code. For example to add additional hidden fields before the closing "</form>" tag.

The editor is available for advanced users only.

The information about the main options is available at Chapter 4.2.5.1 PHP Editor



The following code is written by default:

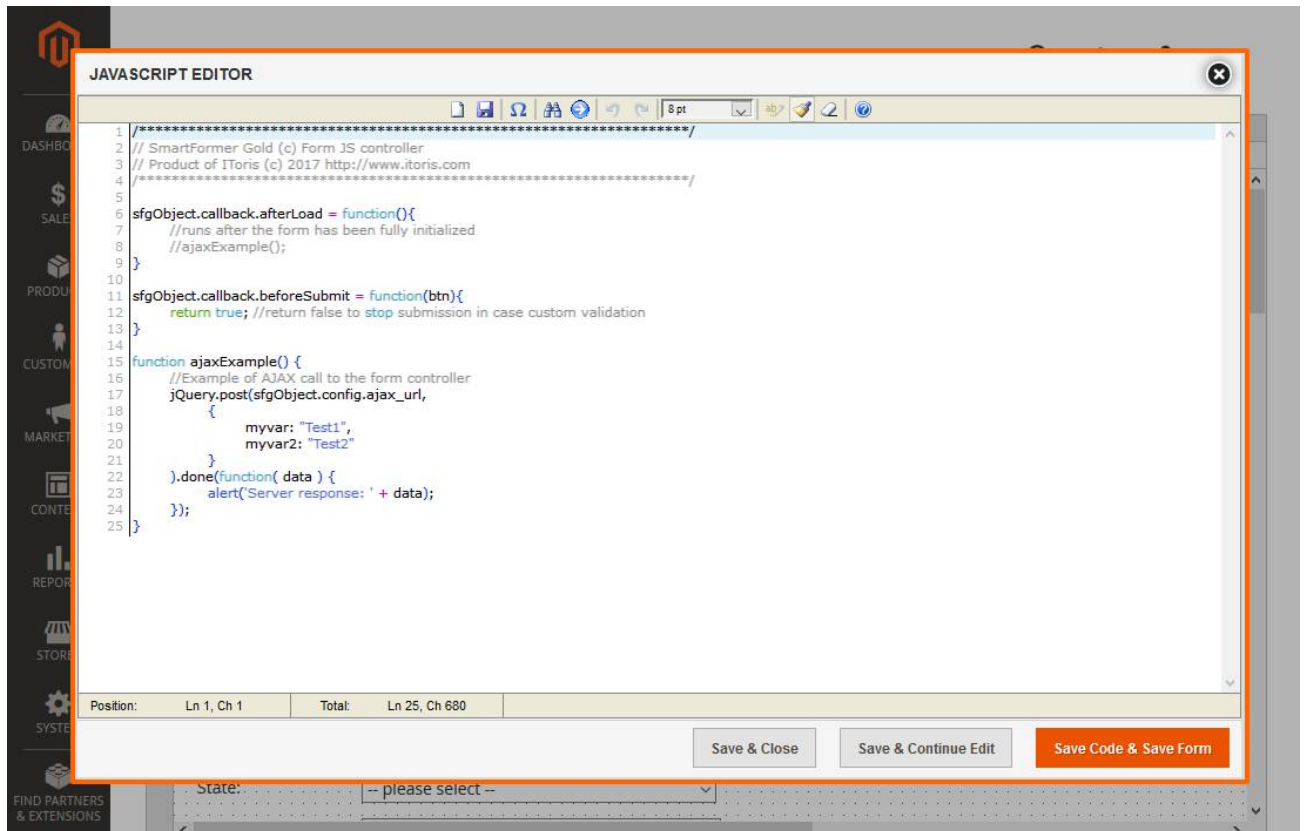
```
<form action="" method="post" name="sfgForm" enctype="multipart/form-data">
<%form_html%>
<input type="hidden" name="date_time" />
</form>
```

### 4.2.5.3 JavaScript Editor

The global JavaScript Editor is the form's event handler. The JS editor adds the code modifying the form's styles, various visual effects, price calculation, and etc.

The editor is available for advanced users only.

The information about the main options is available at Chapter 4.2.5.1 PHP Editor.



The following code is written by default:

```

/*****
// SmartFormer Gold (c) Form JS controller
// Product of IToris (c) 2017 http://www.itoris.com
*****/

sfgObject.callback.afterLoad = function(){
    //runs after the form has been fully initialized
    //ajaxExample();
}

sfgObject.callback.beforeSubmit = function(btn){
    return true; //return false to stop submission in case custom validation
}

function ajaxExample() {

```

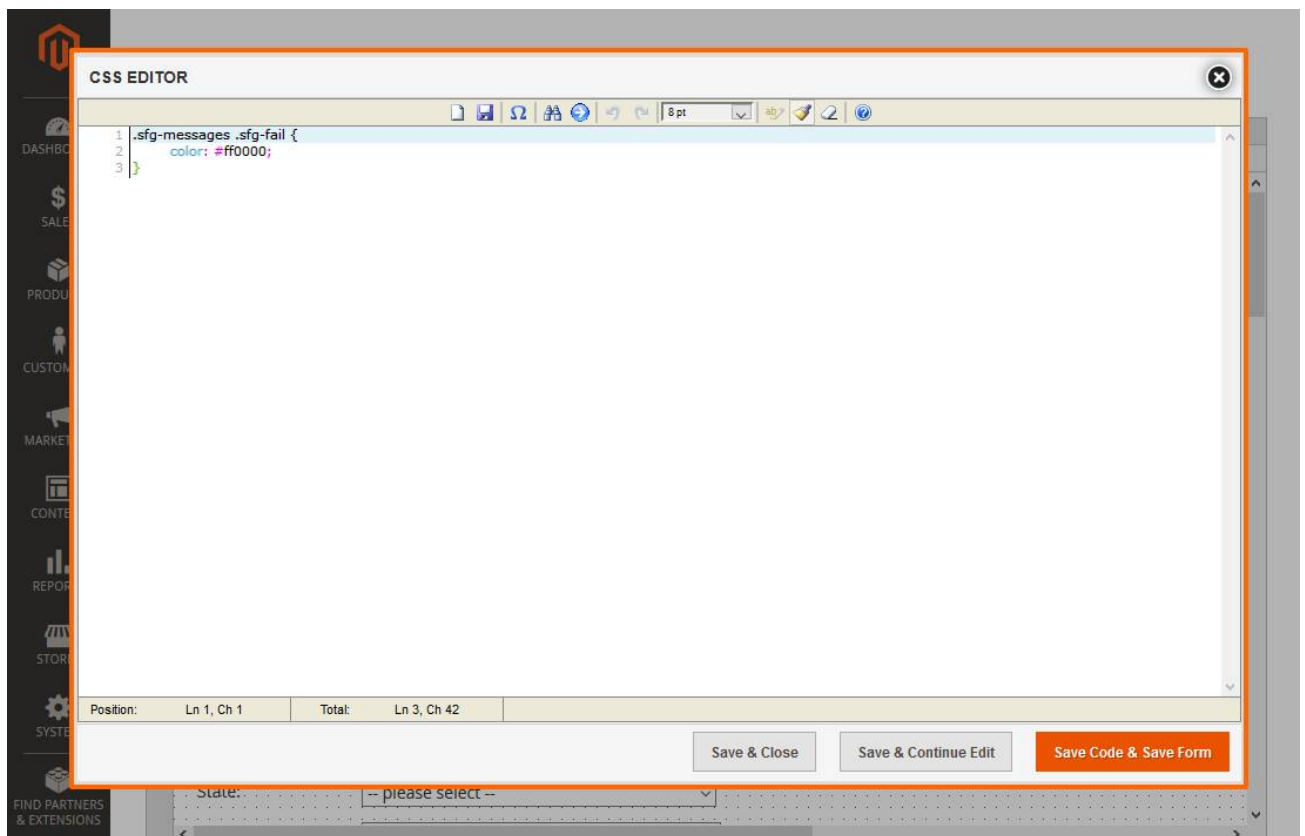
```
//Example of AJAX call to the form controller
jQuery.post(sfgObject.config.ajax_url,
    {
        myvar: "Test1",
        myvar2: "Test2"
    }
).done(function( data ) {
    alert('Server response: ' + data);
});
}
```

#### 4.2.5.4 CSS Editor

The global CSS Editor changes the forms' styles applied to all elements in the form.

The editor is available for advanced users only.

The information about the main options is available at Chapter 4.2.5.1 PHP Editor.



The following code is applied by default:

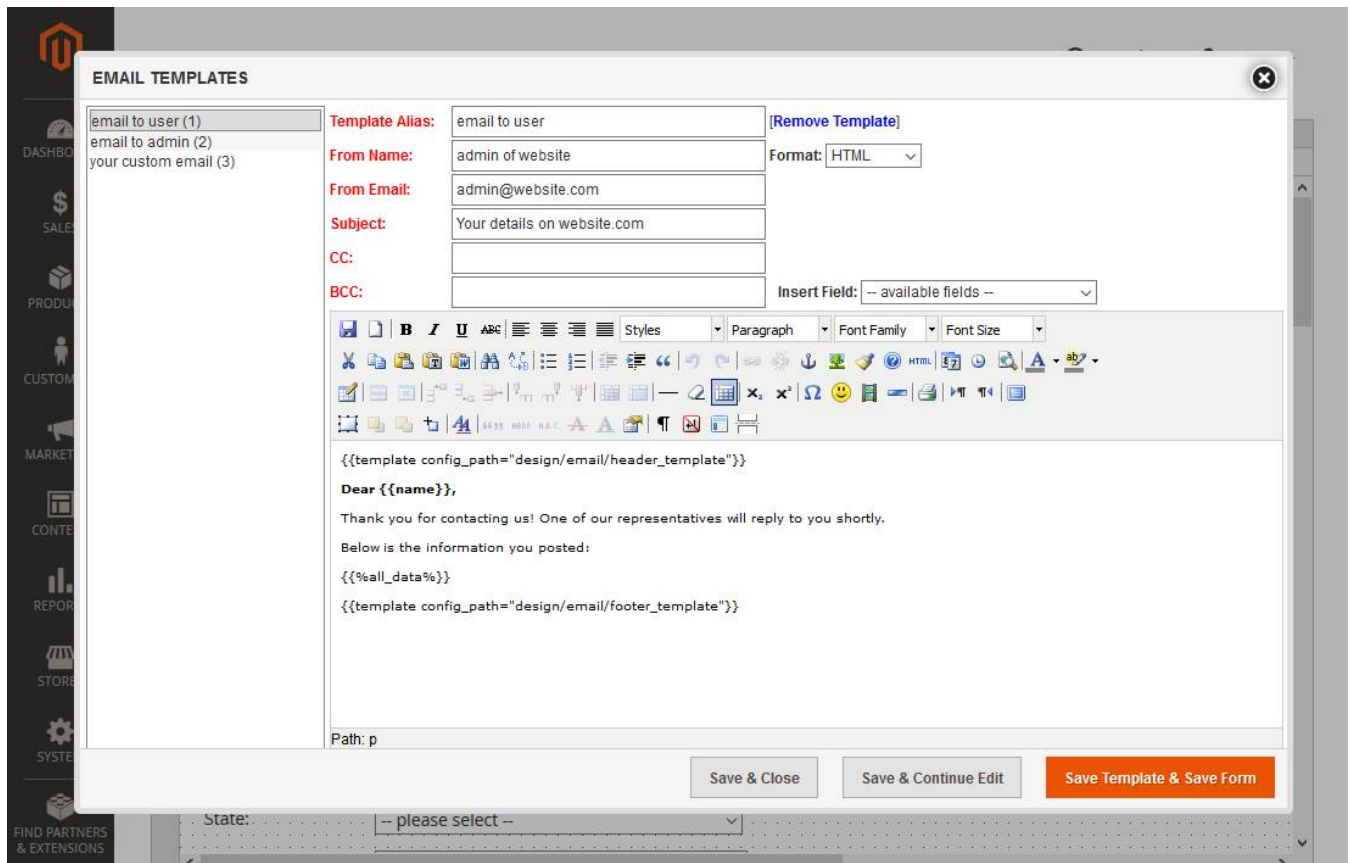
```
.sfg-messages .sfg-fail {
    color: #ff0000;
}
```



#### 4.2.5.5 Email Templates

The email templates functionality provides the ability to edit existing email templates and create new ones. You can edit the email subject and body, set CC & BCC addresses, and the address the email should be sent from. The editor allows to insert dynamic variables into the email subject or body. The variables will then be substituted with the data submitted by customer.

The list of existing email templates is available in the left column. Click on a name to edit the template on the right.



**Template Alias** – the name of the email template.

**From Name** – the sender's name the email will be sent from.

**From Email** – the sender's email address the email will be sent from.

**Subject** – the subject of the email template.

**CC** – the list of email addresses a copy will be sent to separated with comma or semicolon. All recipients will see the email addresses of other recipients.

**BCC** – the same to CC, but recipients will not see addresses of other recipients.

**[Remove Template]** – deletes the current email template.

**Format** – displays the email either in the HTML format or as Plain Text.

**Insert Fields** – contains dynamic variables as elements of the form to be added to the text. Variables will be replaced with the actual data once form is submitted.

The email body can be edited using the rich-text editor. You can change the text styles such as font size, color, make the text bold or italic, insert tables or images, and so on.

To insert submitted data in the text use one of the following methods:

1. Pick up a variable available in dropdown **"Insert Fields"**. The dropdown contains variables for all form fields having name. The format of variable is **{{field\_name}}**
2. Use a reserved variable that combines all the submitted data **{{%all\_data%}}**

To create a new template click the **"New Document"** icon in the editor.

To save the template, click the **"Save"** icon. To save all changes, three buttons are available below the form:

**Save & Close** – saves all changes and closes the Email Templates editor.

**Save & Continue Edit** – saves all changes and stays on the editing page.

**Save Template & Save Form** – saves the template and the current form completely.

To send an email after the form has been submitted select the email template in the submit button properties. For instance, to send an email to admin, mark checkbox "email-to-admin" in the button properties. Then enter admin's email address in property "admin-email" and choose a certain template in dropdown "admin-email-template".

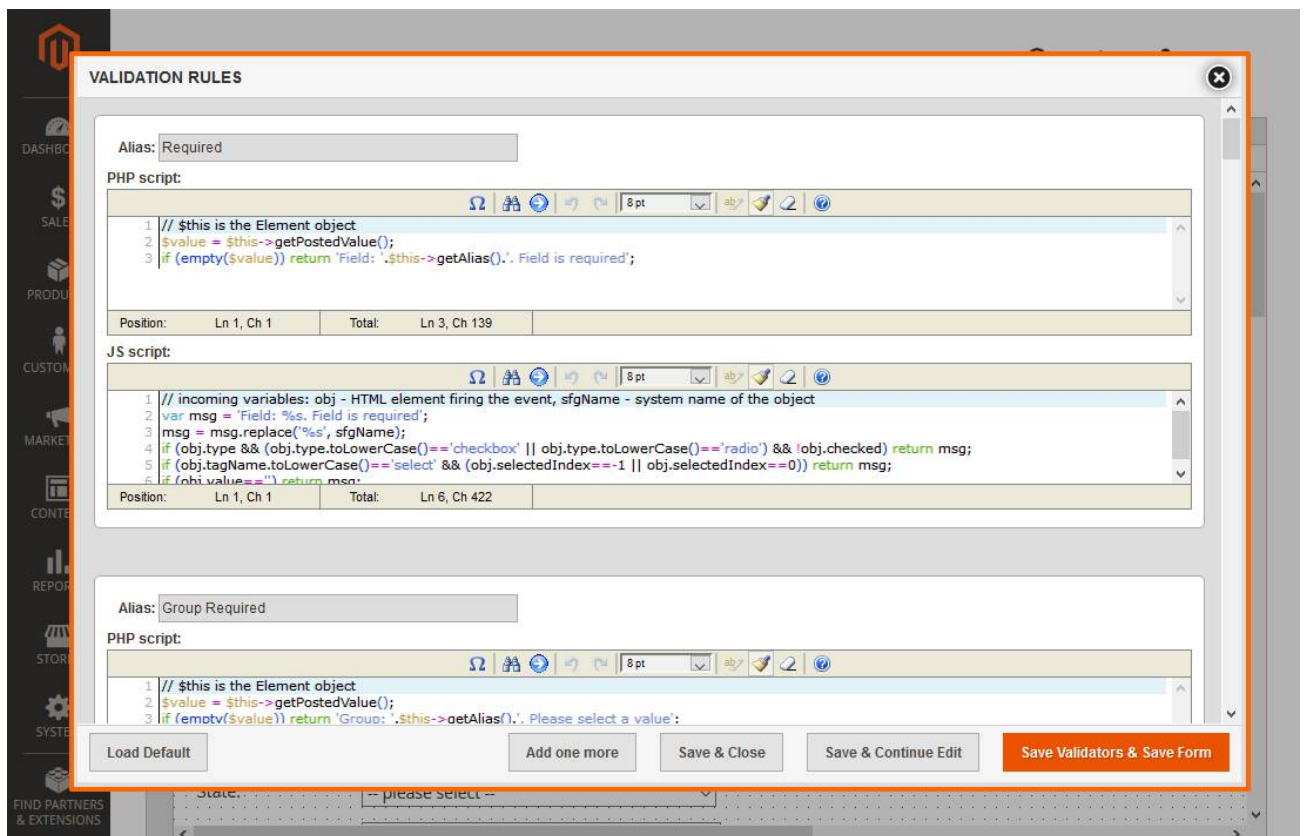
To send an email notification to the customer, mark checkbox "email-to-user" in the button properties. Then choose a field for user's email address in dropdown "user-email-addr-field". This is a field where the customer should enter their email address to. Then choose an email template in dropdown "admin-email-template".

#### 4.2.5.6 Validation Rules

By default the main validation rules are already available following: **Tools -> Validation Rules**.

The first three validation rules **"Required"**, **"Group Required"** and **"Check identical"** are reserved without ability to change the titles or delete them. You can change or translate the error messages if needed.

Rules "Required" and "Group Required" are available in the properties of certain elements such as "Input Box", "Text Area", "Radio Buttons", and etc. "Check Identical" is used for dropdown "equal-to" where the second element should be equal to the current one, for instance, in case of email or password confirmation.



Each validation rule is provided with a title and two scripts for the server-side PHP validation and for the client-side JavaScript validation.

**Alias** – defines the name of the rule.

**Remove this rule** – deletes the rule.

The **JS script** runs on the client side, i.e. in the browser, to validate the input. If the value doesn't match the defined pattern a validation message appears and form can't be submitted unless the "disable validation" option is selected in the button properties.

The **PHP script** runs on the server side and prevents an incorrect value from being submitted bypassing the JavaScript validation. Typically the PHP script repeats the same validation algorithm the JS script does. In rare cases the PHP validation for a page can be disabled by selecting option "disable validation" in the button properties.

The following buttons are available at the bottom of the popup:

**Add one more** – creates a new rule.

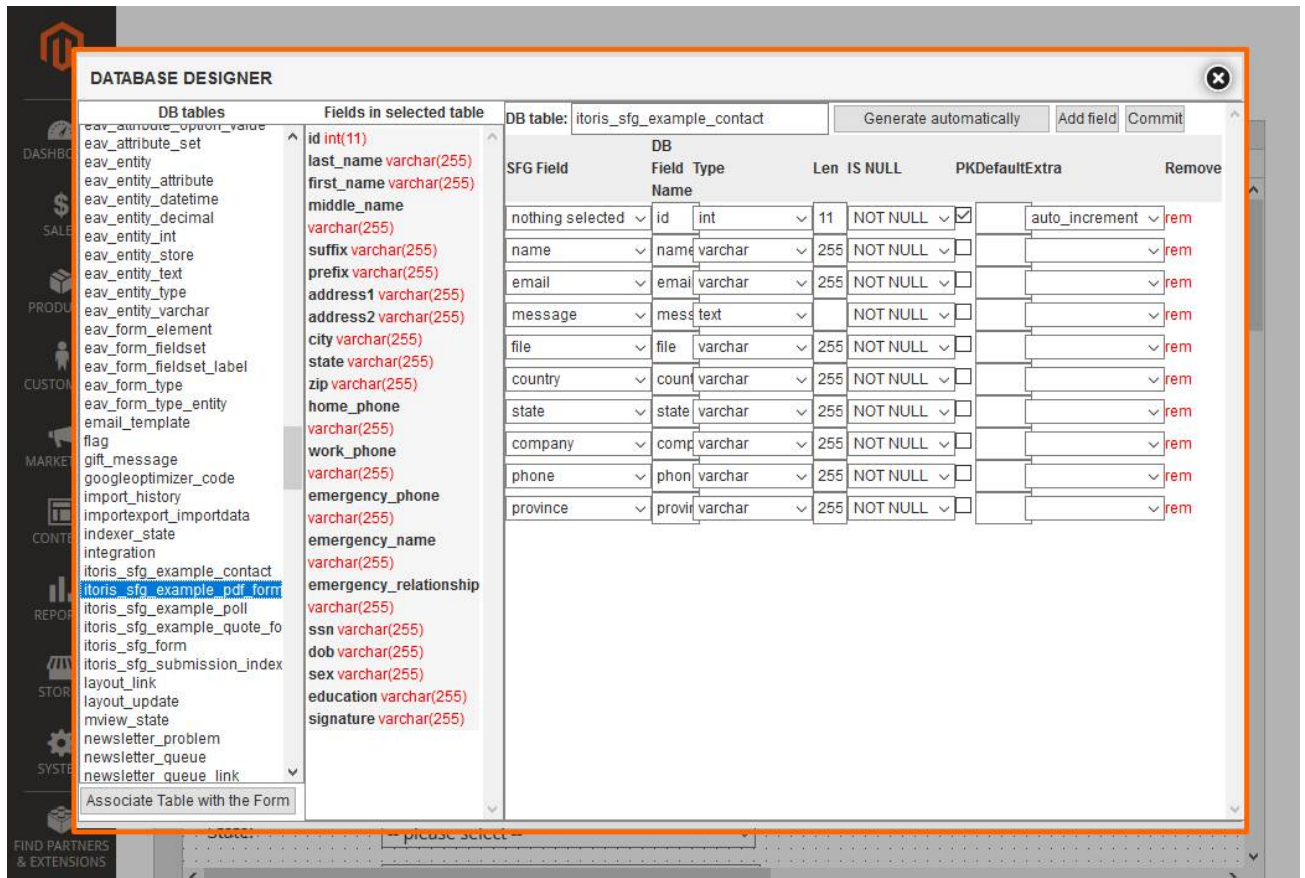
**Save & Continue Edit** – saves all validation rules only.

**Save Validators & Save Form** – saves all validation rules and saves the current form.

#### 4.2.5.7 Database Designer

Once the form has been created it can be associated with the database. In this case all submissions will be saved in a separate database table. Admin can then see and manage all records from backend. This option is needed if you plan to log and track all submissions in one place. However, if the form should only send submissions by email there is no necessity in database connection.

The database manager is available following **Tools -> Database Designer**.



Before connecting form to the database make sure all fields that should be saved have unique names in properties. Field's name should be alpha-numeric with no spaces and special symbols, in lower case preferably.

To bind the form to the database click button "**Generate automatically**". It will create the database table structure and map all the form fields to the table columns. Then enter a new **DB table** name also alpha-numeric with no spaces. And click button "**Commit**". Then close the popup and save the entire form. Now form will be associated with the database.

The Database Designer provides the following settings:

**DB table** – specifies the title of a new DB table.

**Generate automatically** – button, creates the DB table automatically.

**Add field** – adds a new field to the DB table. If new a field added on the form after the database table has already been created use this button to add and map the new field manually.

**Commit** – commits the database changes to the server.

The table columns configuration has the following properties:

**SFG Field** – select a form field to map it to the DB field.

**DB Field Name** – enter the DB field name (alpha-numeric).

**Type** – select the DB field type (INT, VARCHAR, etc.)

**Len** – enter the max length of the value saved in this DB field.

**Is Null** – defines if an empty value should be saved as NULL in the database.

**PK** – primary key is used for the `id` field only.

**Default** – defines a text or numeric value by default.

**Extra** – indicates if field is auto-increment, should be used for the `id` field.

**Remove** – deletes the field.

After all changes the DB table structure should be re-committed and the form itself re-saved.

## 4.2.6 Element Properties

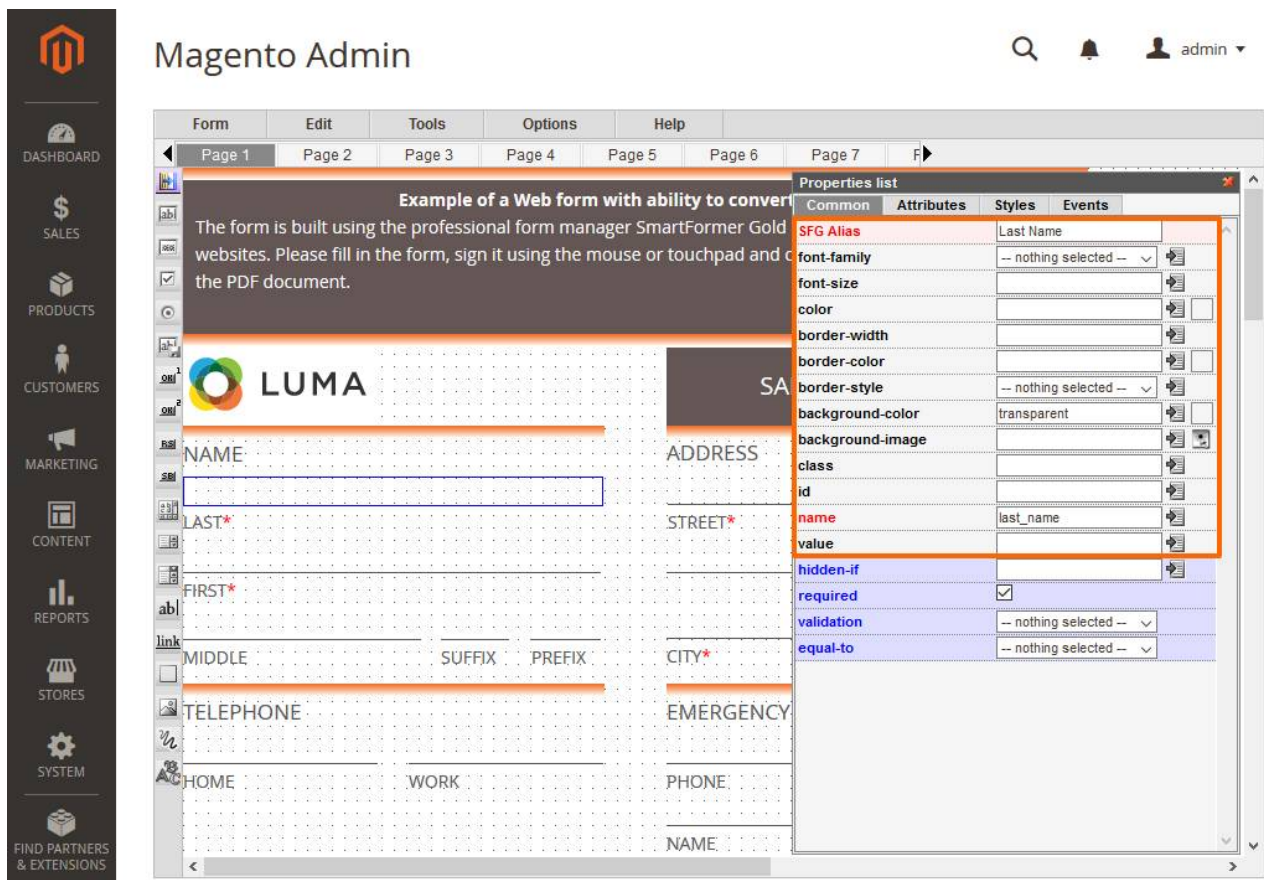
There are some common properties available per each element. The PHP editor is provided next to the each property for advanced use.

You can disable the properties list following **Options -> Show Properties** by clearing checkbox next to the option.

### 4.2.6.1 Common Properties

**SFG Alias** – the title of the chosen element shown in the backend after the form is submitted. SmartFormer Gold Alias is also used in all reports and email templates.





The font settings include the following properties:

**Font-family** – specifies the font family.

**Font-size** – defines the font size.

**Color** – specifies the color. To choose a certain color, the "Color Selector" icon is available next to the property.

The border settings include the following properties:

**Border-width** – defines the width of the border.

**Border-color** – defines the color of the border. To choose a certain color, the "Color Selector" icon is available next to the property.

**Border-style** – specifies the style of the border.

The background settings include the following properties:

**Background-color** – defines the background color. To choose a certain color, the "Color Selector" icon is available next to the property.

**Background-image** – loads the background image. To choose a certain image, the "Image Selector" icon is available next to the property.

**Class** – is used for setting the CSS class.

**ID** – HTML ID of the field.

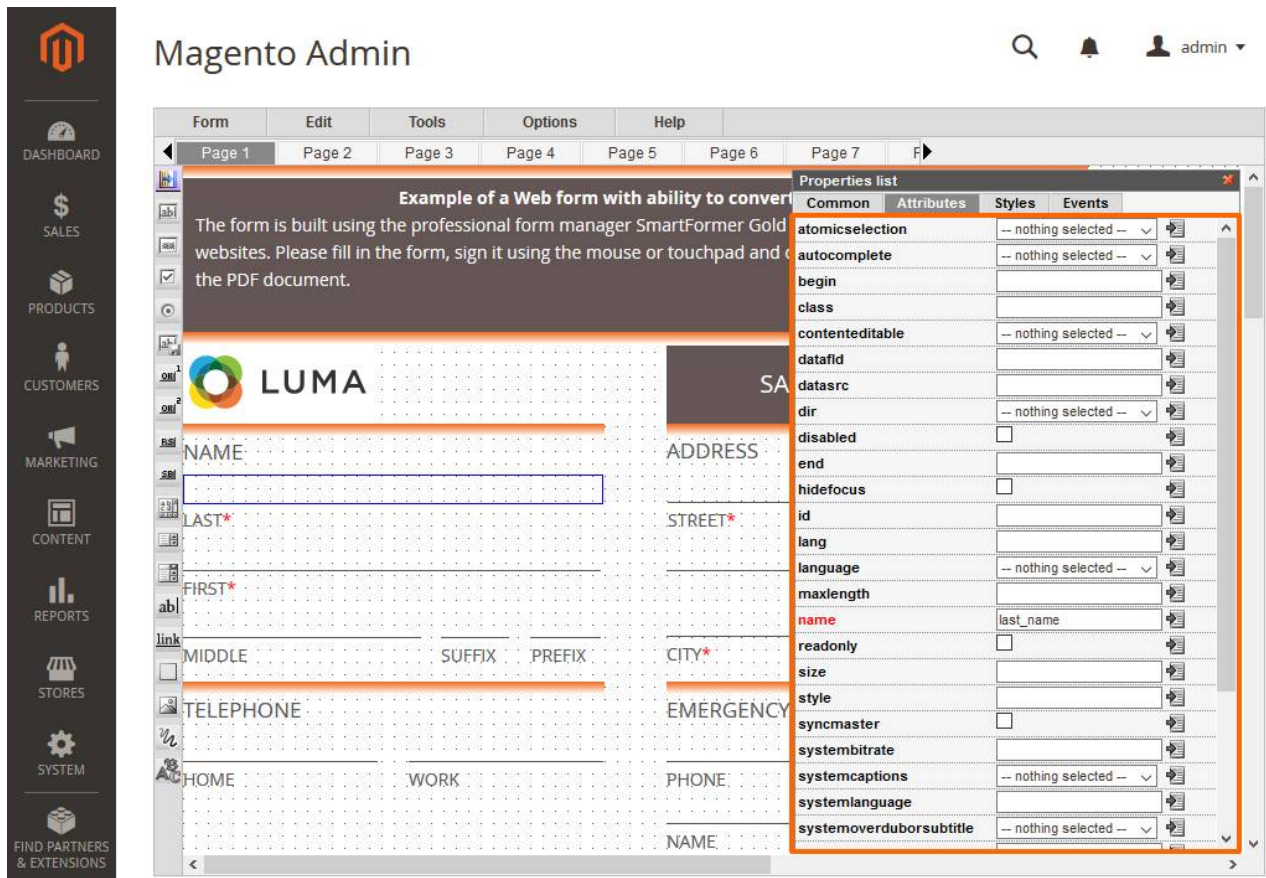
**Name** – HTML name of the field. Also used to bind the element to the database. Name should be alphanumeric with no spaces and special symbols, in lower case preferably.

**Value** – default value/text of the field.

#### 4.2.6.2 Attributes

The list allows to configure HTML attributes of the field. Attributes are added to the HTML tag between angle brackets, example:

```
<input type="text" name="myfield" value="my text" maxlength="10" class="my-css-class" />
```



Here is a few examples of specified attributes based on the "Input Box" element:

**Disabled** – defines whether the user can interact with the element.

**Maxlength** – defines the maximum number of characters allowed in the element.

**Readonly** – shows whether the element can be edited.

**Size** – defines the width of the element.

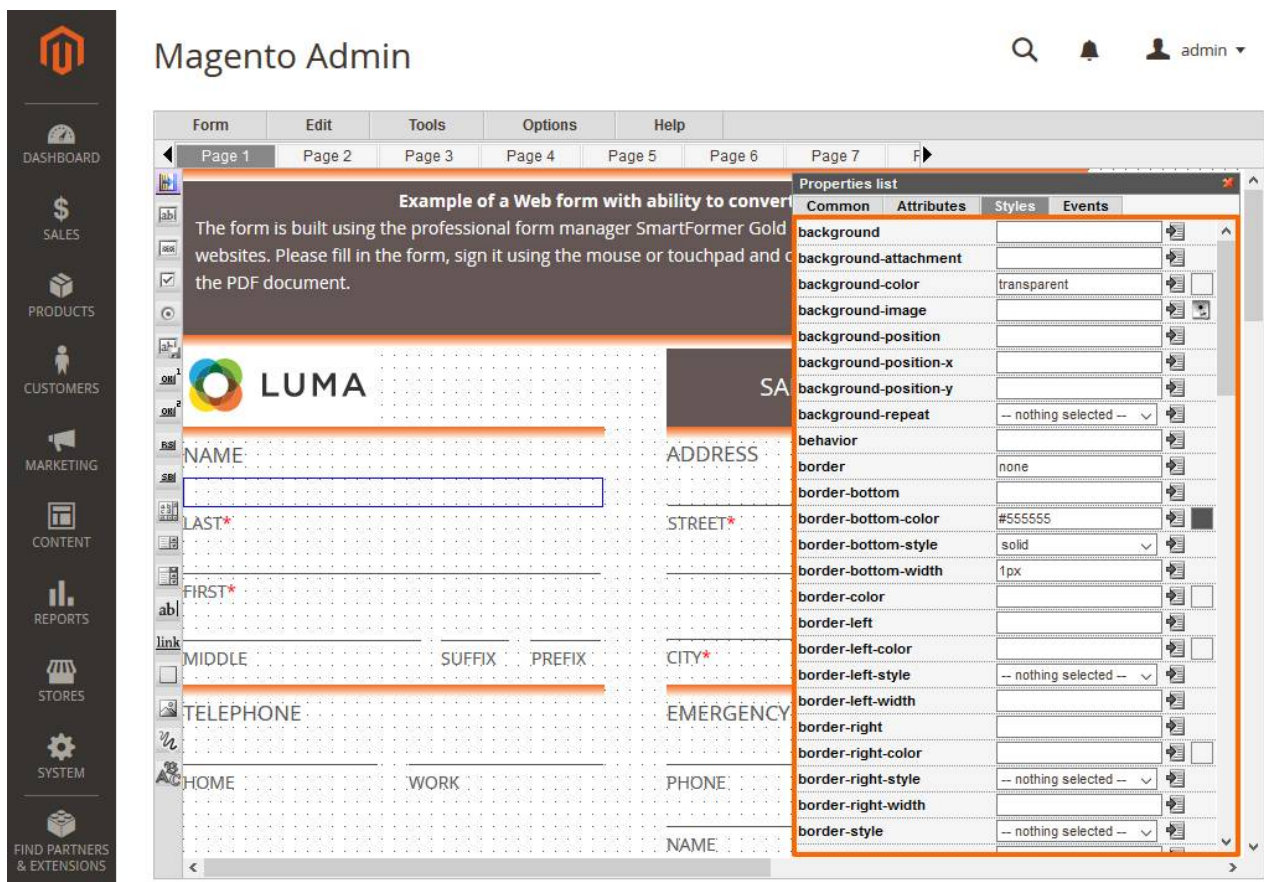
**TabIndex** – overrides the browser's default tab order and follows the one specified instead.

**Value** – defines a default value which will be displayed in the element on page load.

#### 4.2.6.3 Styles

The list allows to configure CSS inline styles for the field. All chosen styles are added into the "style" attribute and separated with semicolon, example:

```
<input type="text" name="myfield" style="border: 1px solid red; background: yellow" />
```



Here is a few examples of specified styles based on the "Input Box" element:

**Background-image** – sets the background-image for the element.

**Border-color** – sets the color of the element's border.

**Font-family** - sets the font family of the element.



**Font-size** – sets the font size of the text.

**Opacity** – sets the opacity level for the element.

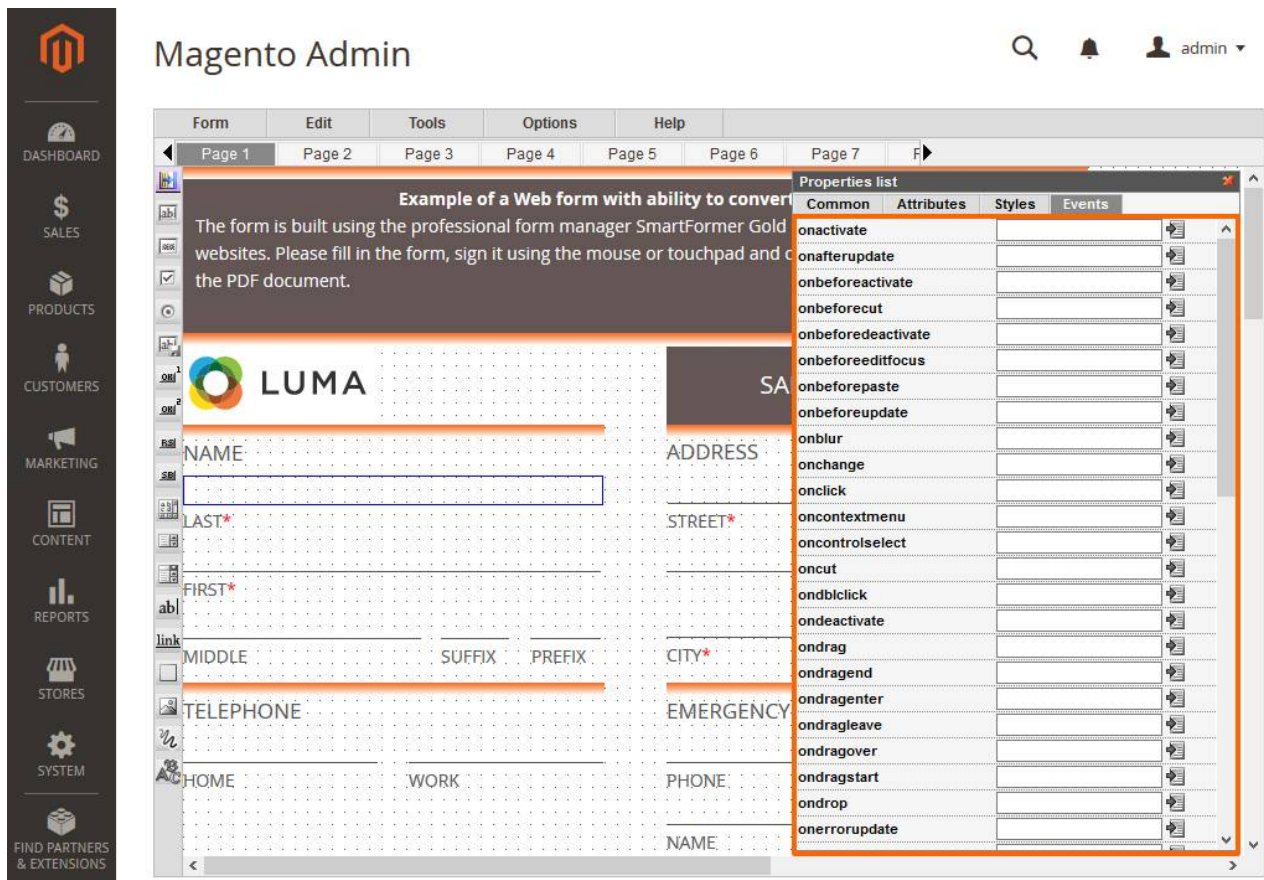
**Padding** – sets the inner padding of the element.

#### 4.2.6.4 Events

The list allows to configure HTML events for the field and bind them to your custom JavaScript, example:

```
<input type="text" name="myfield" onfocus="this.style.background='red';"  
onblur="this.style.background='white';">
```

```
<input type="button" value="Submit" onclick="alert('Hello World!');" />
```



Here are a few examples of specified events based on the "Input Box" element:

**Onblur** – the element loses focus.

**Onkeypress** – the user is pressing a key.

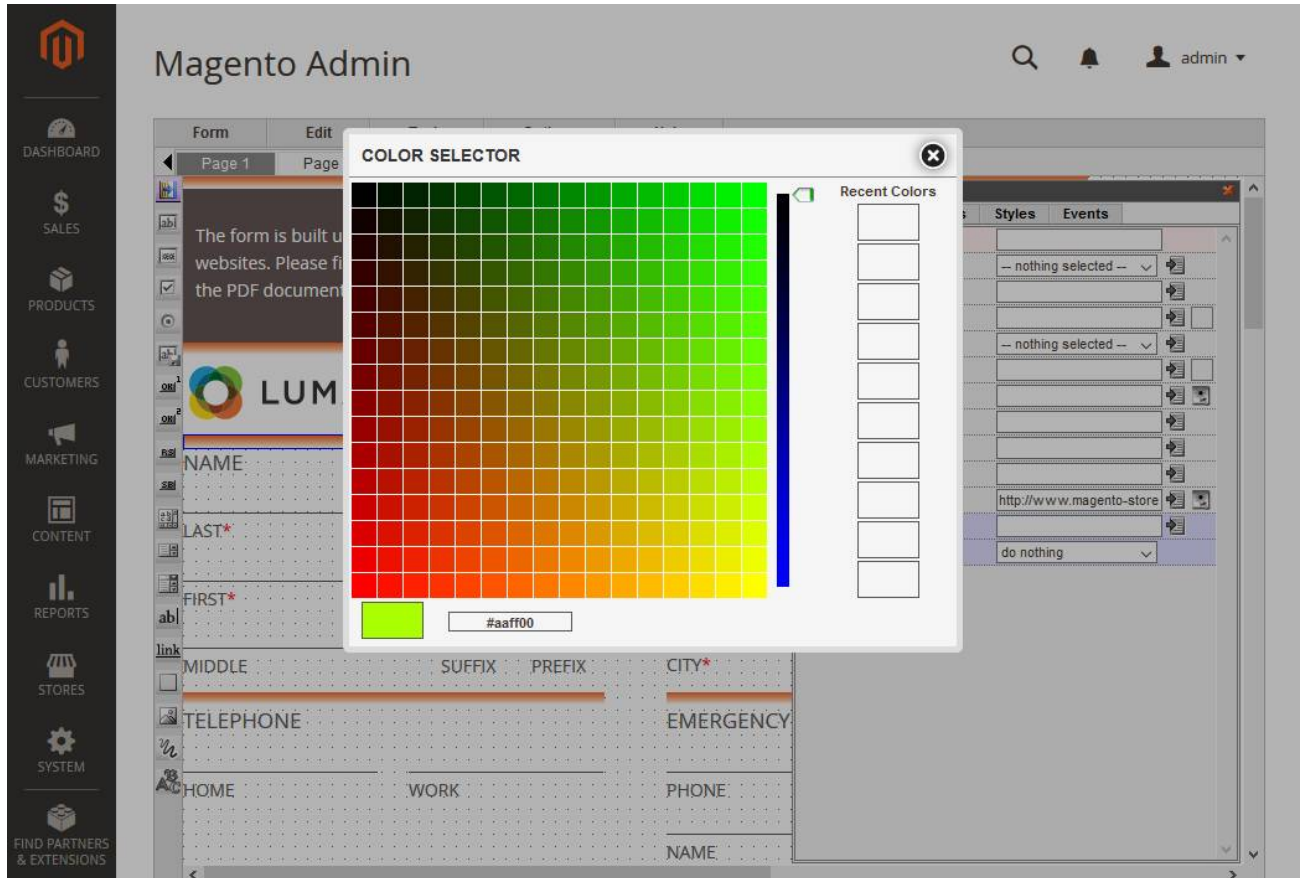
**OnClick** – the user clicks a mouse button over the element.

**Onpaste** – the user pastes some content in the element.

#### 4.2.6.5 Color Selector

The "**Color Selector**" icon is available next to the color properties.

After opening "Color Selector", choose the color or define its number. The selector also contains the previously selected colors in the right bar "**Recent Colors**".



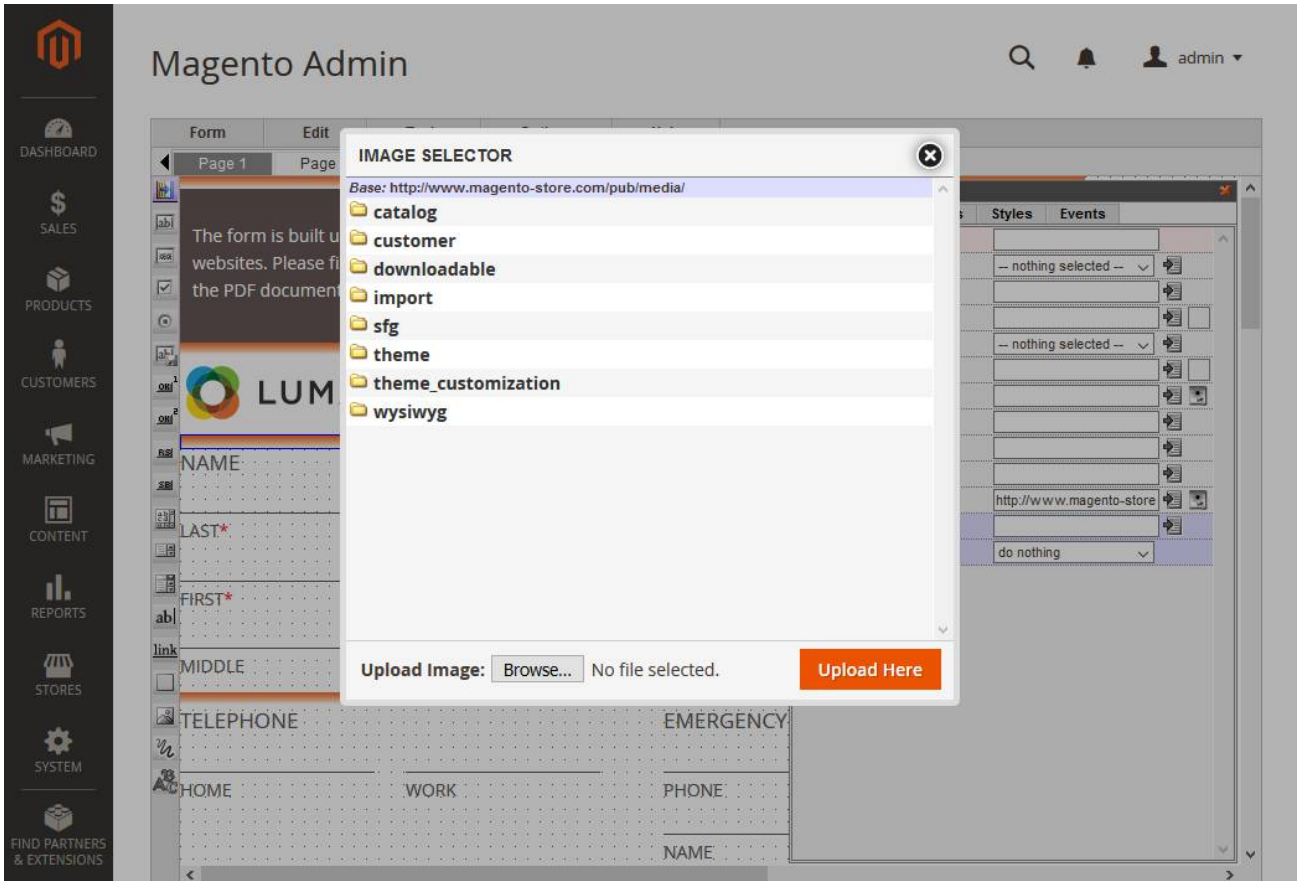
#### 4.2.6.6 Image Selector

The "**Image Selector**" icon is available next to the properties where image can be selected such as "SRC" attribute of images or the "background-image" style of other elements.

After opening "Image Selector" you can browse images already available on the server in folder /pub/media or upload your own image.

Choosing images from Magento folders, the image's URL will be copied directly into the property field.

Section "**Upload Here**" below the folders allows to upload your own image file into the currently opened folder.

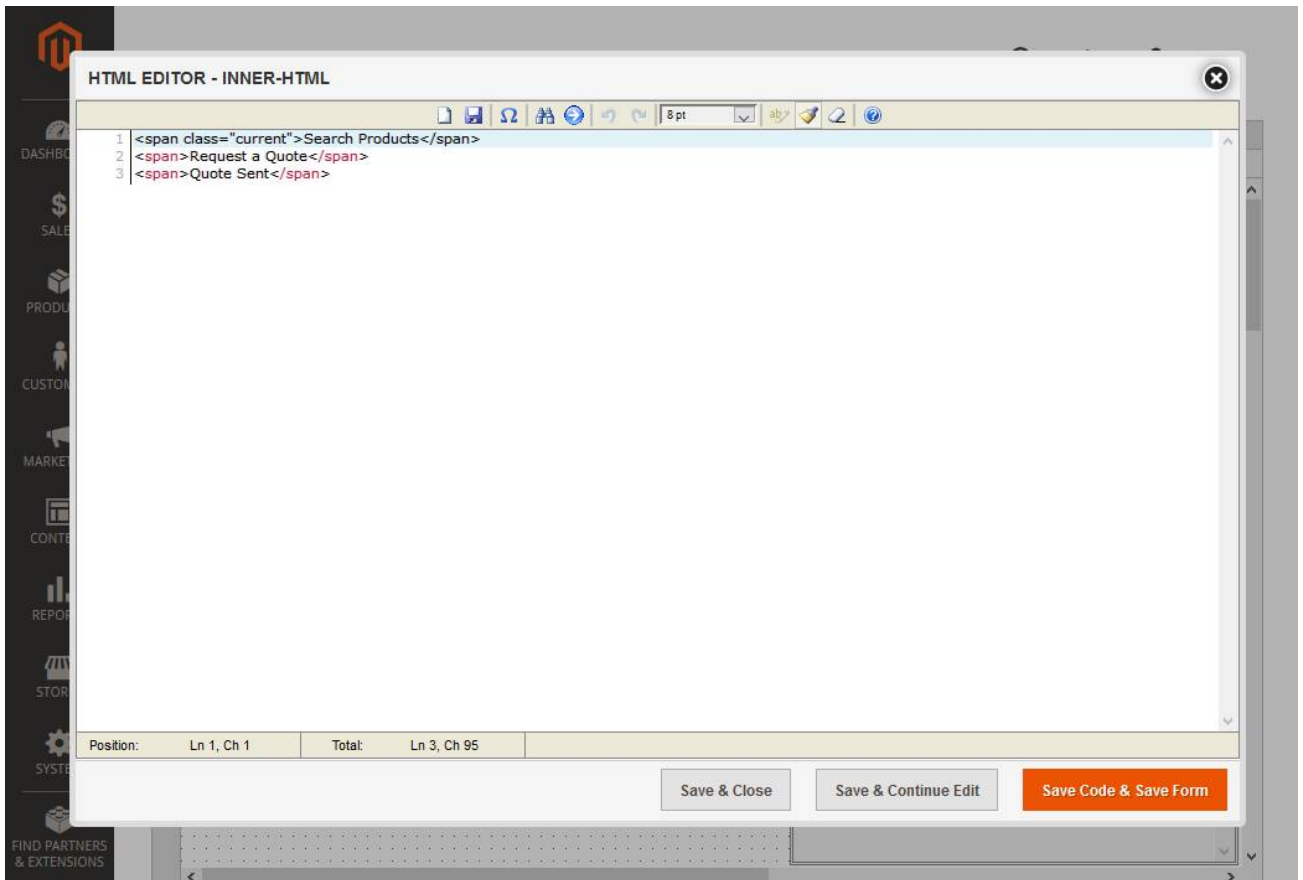




#### 4.2.6.7 HTML Editor

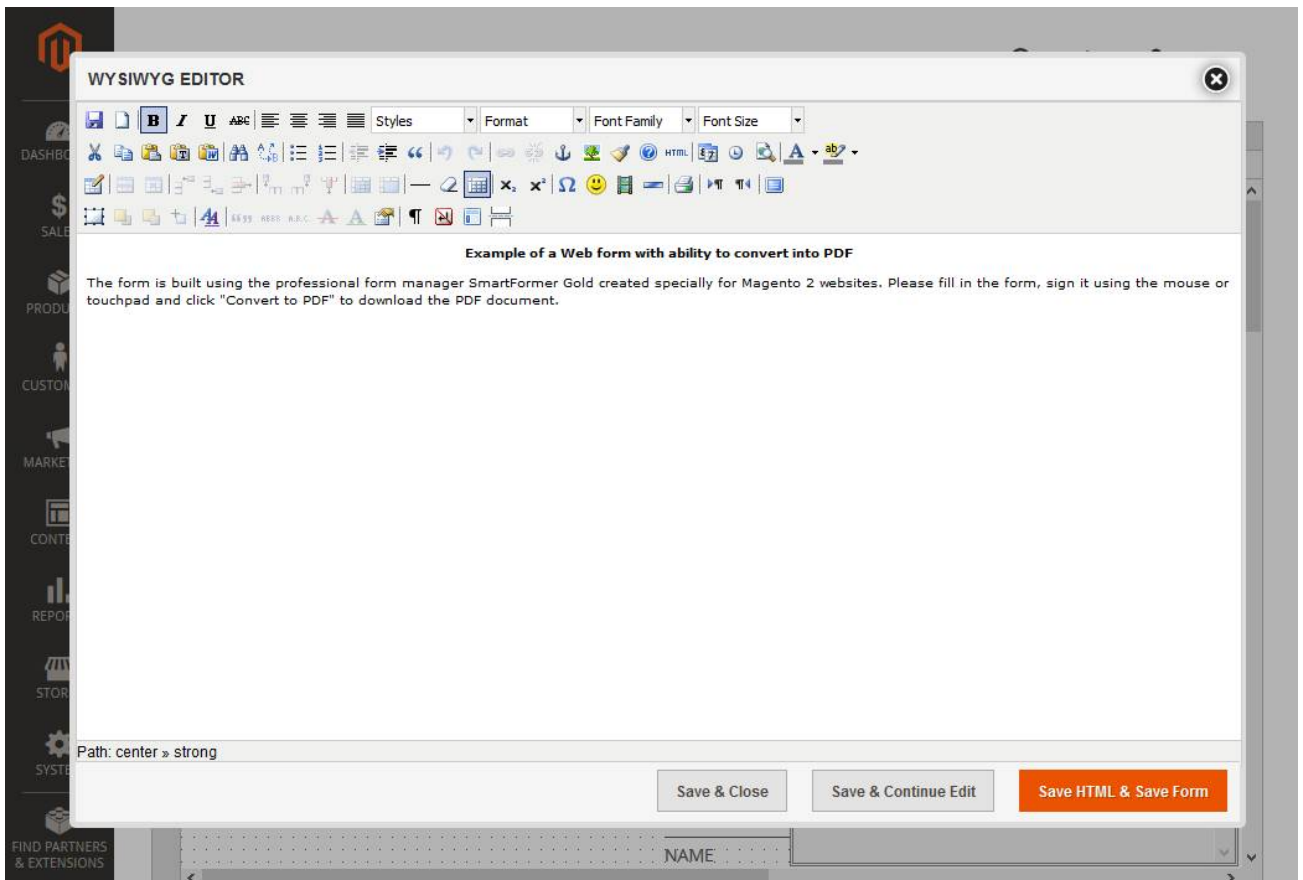
The HTML Editor is applied to certain elements only such as internal/external links, or div element.

See Chapter 4.2.5.2 HTML Editor lists the key features.



#### 4.2.6.8 Rich Text Editor

The Rich Text Editor is used for the "Static Text" element. The WYSIWYG editor simplifies the element content creation. Use buttons in the toolbar to align text, make it bold or italic, change font or colors, add tables or images, etc.



#### 4.2.6.9 PHP Editor

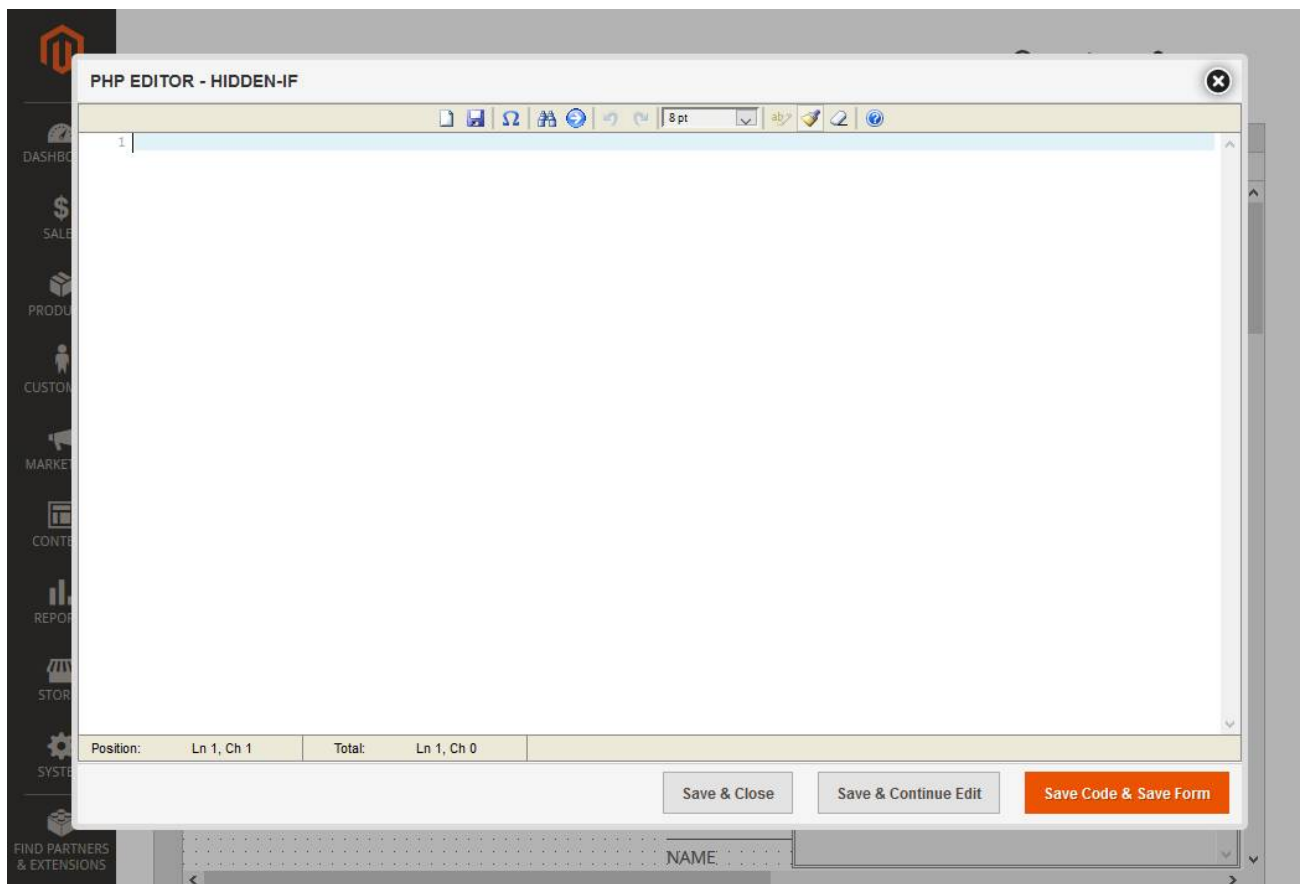
The PHP editor is available for all element properties mostly. Click the "Edit PHP script" icon next to the property field.

The editor allows to bind your custom PHP code while the element is still generated. For instance, open the PHP editor for the "value" property of an inputbox. Write:

```
$session = $this->getForm()->_objectManager->get('Magento\Customer\Model\Session');  
if ($session->isLoggedIn()) {  
    echo $session->getCustomer()->getName();  
}
```

This will display the name of currently logged in customer in the field on frontend.

For more information, please see Chapter 4.2.5.1 PHP editor



### 4.2.7 Editing Actions

The editing actions are available in the "Edit" menu bar:

**Cut** – cuts selected element(s) for pasting.

**Copy** – copies selected element(s).

**Paste** – pastes copied element(s).

**Delete** – removes selected element(s) completely.

**Select All** – selects all elements on the current page.

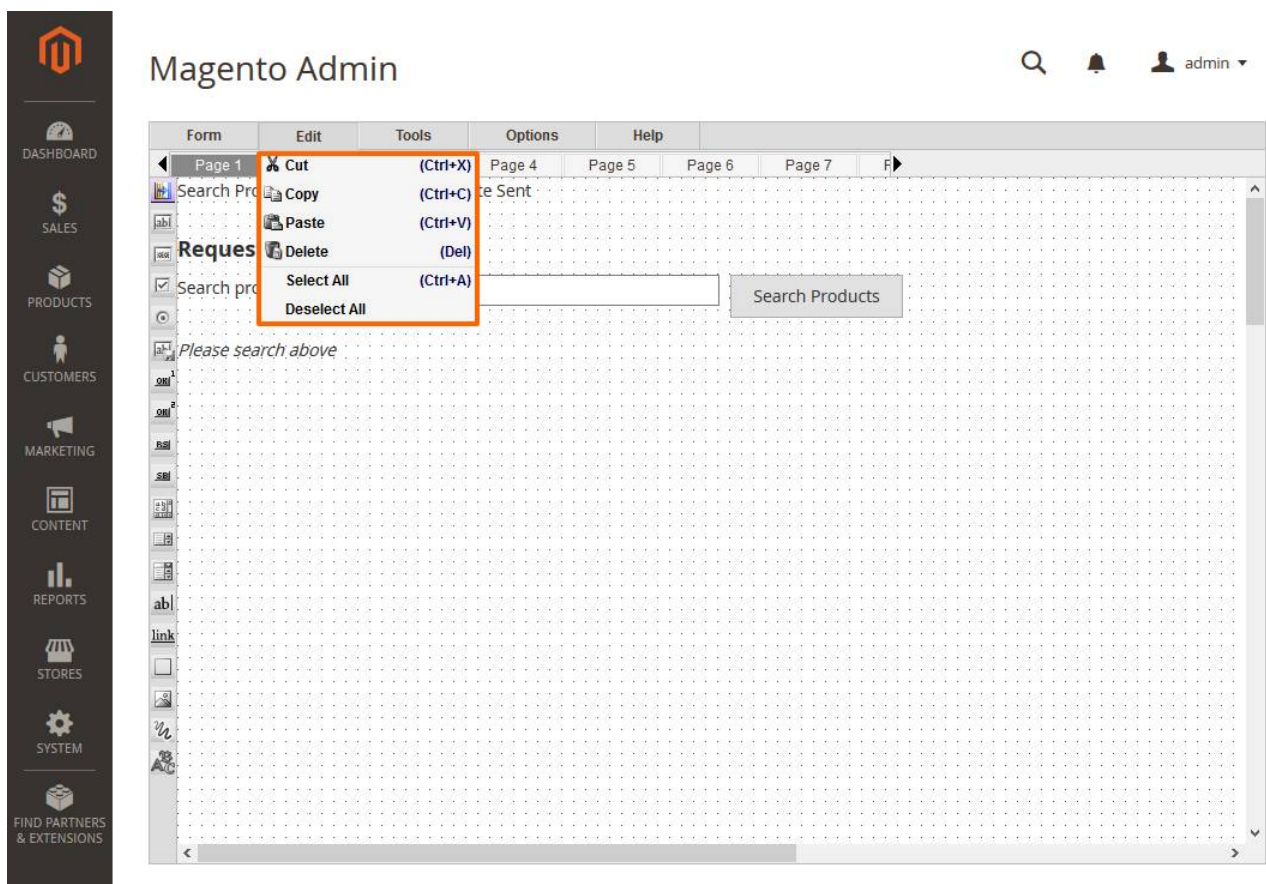
**Deselect All** – deselects all selected elements.

A few more actions can be found in the "Form" menu bar:

**Save Form** – saves the current form.

**Clear Form** – clears the entire form.

**Exit** – closes the current form and navigates to the list of forms.



### 4.2.8 Hot Keys

The following hot keys applied to the whole form:

**Save Form** – Ctrl + S

**Paste** – Ctrl + V

**Cut** – Ctrl + X

**Delete** – Del

**Copy** – Ctrl + C

**Select All** – Ctrl + A

### 4.2.9 Editor Options

The form editor's options are available in the "**Options**" menu bar.

**Stick Effect** – a helper to align multiple elements vertically or horizontally. If two or more elements are vertically or horizontally close to each other a magnetic effect will align them automatically.

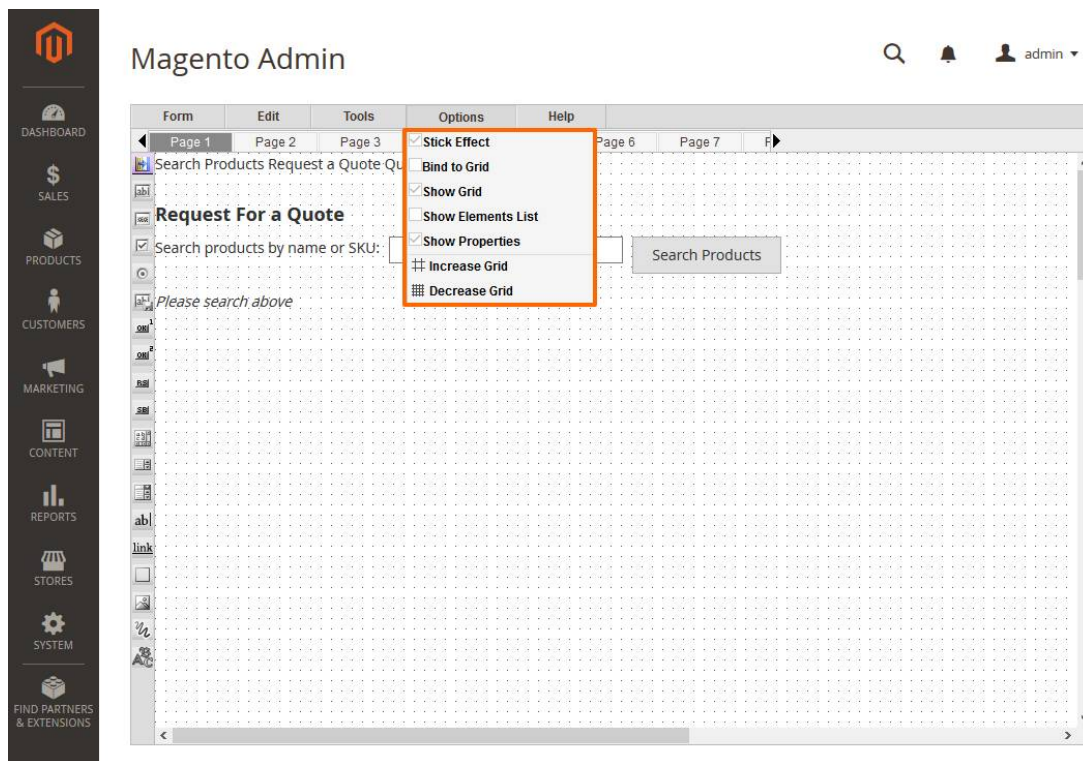
**Bind to Grid** – if grid is enabled the moved elements will be bound to it. This is another helper to make the form more structured and aligned.

**Show Grid** – displays or hides the editor grid.

**Show Elements List** – displays the list of all elements currently available on the page.

**Show Properties** – displays the properties of the currently selected element.

**Increase Grid/Decrease Grid** – enlarges or reduces the grid cells' size.



#### 4.2.10 Help Options

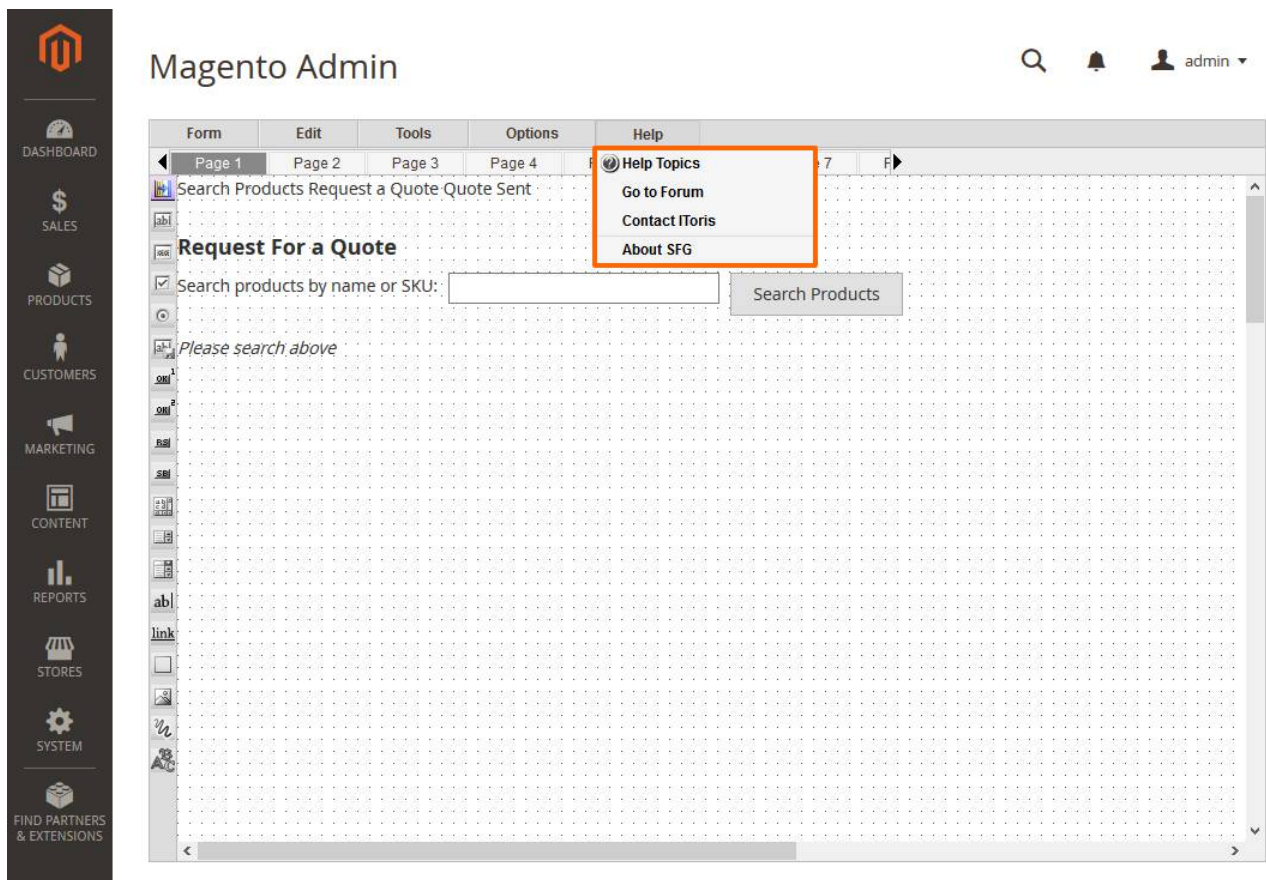
Get help or find more information about the SmartFormer Gold extension in the "Help" menu.

The following options are available:

**Help Topics** – goes to the official SFG extension page where the documentation and the change log can be found.

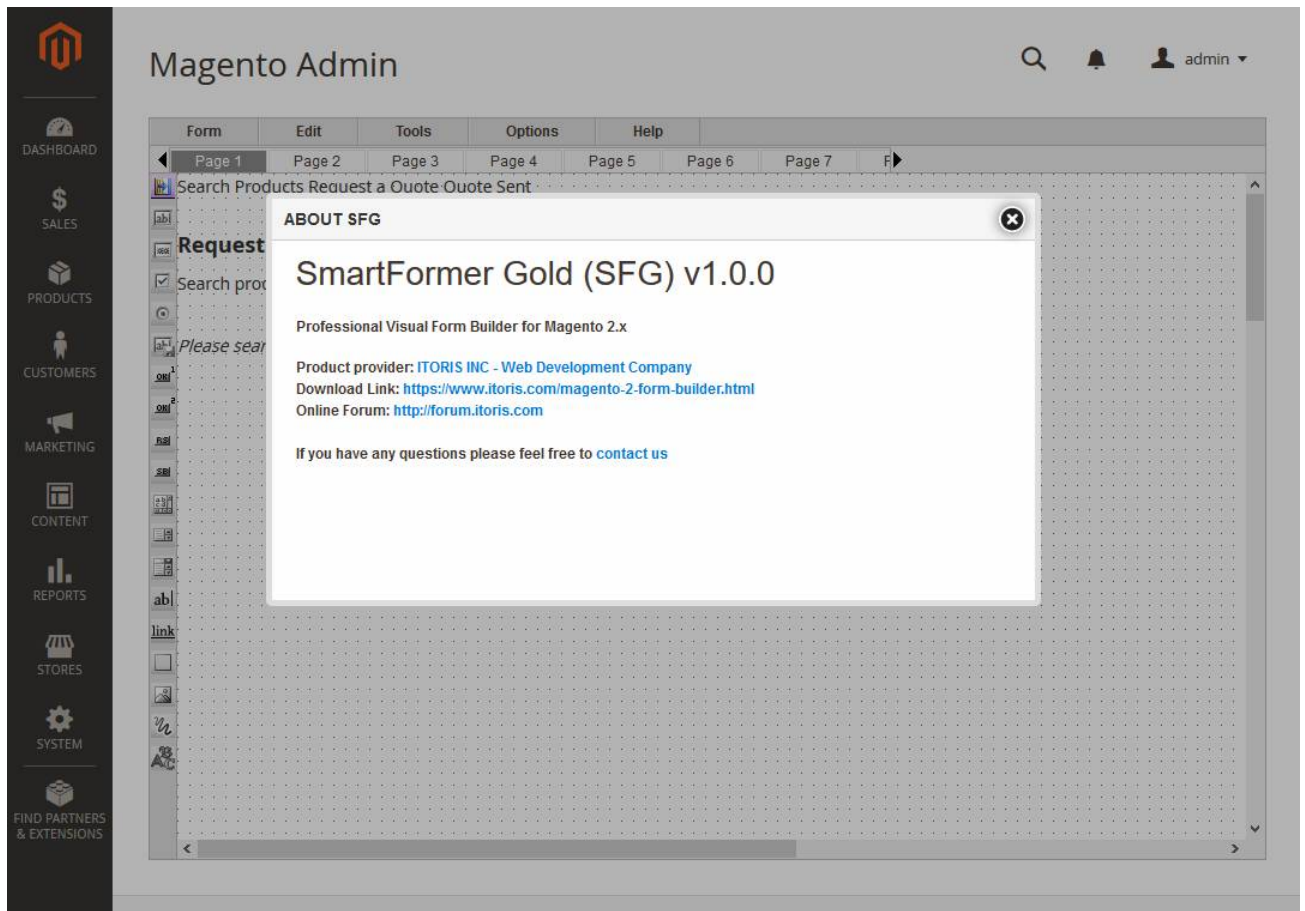
**Go to Forum** – goes to the ITORIS Forum where you can ask your questions, get tips and tricks or communicate with the community.

**Contact IToris** – redirects to the ITORIS "Contact Us" page.





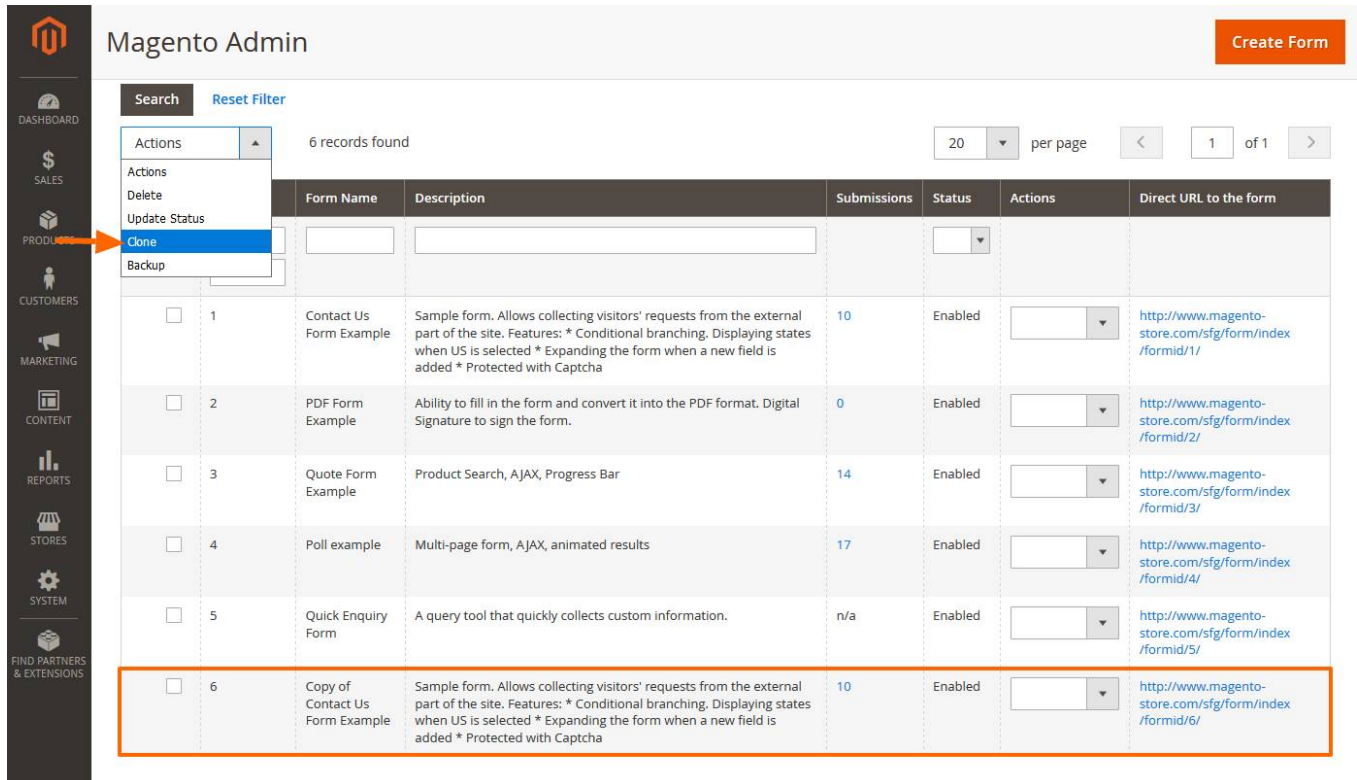
**About SFG** – provides more information about the current version, the extension provider, links for downloading, online forum, and the contact page.



## 4.3 Cloning Forms

The extension also allows to make copies of multiple forms or particular one. Select multiple forms in the list and then choose "Clone" in the mass-actions dropdown.


To clone a single form only, choose "Clone" in column Actions.









**Magento Admin** Create Form

Search [Reset Filter](#)

6 records found 20 per page 1 of 1

**Actions** 

- Actions
- Delete
- Update Status
- Clone**
- Backup

	Form Name	Description	Submissions	Status	Actions	Direct URL to the form
<input type="checkbox"/>	1	Contact Us Form Example	Sample form. Allows collecting visitors' requests from the external part of the site. Features: * Conditional branching. Displaying states when US is selected * Expanding the form when a new field is added * Protected with Captcha	10	Enabled	 <a href="http://www.magento-store.com/sfg/form/index/formid/1/">http://www.magento-store.com/sfg/form/index/formid/1/</a>
<input type="checkbox"/>	2	PDF Form Example	Ability to fill in the form and convert it into the PDF format. Digital Signature to sign the form.	0	Enabled	 <a href="http://www.magento-store.com/sfg/form/index/formid/2/">http://www.magento-store.com/sfg/form/index/formid/2/</a>
<input type="checkbox"/>	3	Quote Form Example	Product Search, AJAX, Progress Bar	14	Enabled	 <a href="http://www.magento-store.com/sfg/form/index/formid/3/">http://www.magento-store.com/sfg/form/index/formid/3/</a>
<input type="checkbox"/>	4	Poll example	Multi-page form, AJAX, animated results	17	Enabled	 <a href="http://www.magento-store.com/sfg/form/index/formid/4/">http://www.magento-store.com/sfg/form/index/formid/4/</a>
<input type="checkbox"/>	5	Quick Enquiry Form	A query tool that quickly collects custom information.	n/a	Enabled	 <a href="http://www.magento-store.com/sfg/form/index/formid/5/">http://www.magento-store.com/sfg/form/index/formid/5/</a>
<input type="checkbox"/>	6	Copy of Contact Us Form Example	Sample form. Allows collecting visitors' requests from the external part of the site. Features: * Conditional branching. Displaying states when US is selected * Expanding the form when a new field is added * Protected with Captcha	10	Enabled	 <a href="http://www.magento-store.com/sfg/form/index/formid/6/">http://www.magento-store.com/sfg/form/index/formid/6/</a>

## 4.4 Importing/Exporting Forms

The extension allows to back up and import forms.

To export multiple forms select them in the list. Then choose "Backup" in the Mass Actions dropdown. A JSON file will be available for download. The file can be saved locally as a backup or for uploading on another site.

To download a backup for a single form simply choose action "Backup" next to the form.

Section "Upload Forms" allows to import existing forms saved as a JSON file previously.

**Magento Admin** Create Form

Search Reset Filter

5 records found 20 per page 1 of 1

**Actions**  
 Actions  
 Delete  
 Update Status  
 Clone  
**Backup**

	Form Name	Description	Submissions	Status	Actions	Direct URL to the form
<input type="checkbox"/>	1	Contact Us Form Example	Sample form. Allows collecting visitors' requests from the external part of the site. Features: * Conditional branching. Displaying states when US is selected * Expanding the form when a new field is added * Protected with Captcha	10	Enabled	<a href="http://www.magento-store.com/sfg/form/index/formid/1/">http://www.magento-store.com/sfg/form/index/formid/1/</a>
<input type="checkbox"/>	2	PDF Form Example	Ability to fill in the form and convert it into the PDF format. Digital Signature to sign the form.	0	Enabled	<a href="http://www.magento-store.com/sfg/form/index/formid/2/">http://www.magento-store.com/sfg/form/index/formid/2/</a>
<input type="checkbox"/>	3	Quote Form Example	Product Search, AJAX, Progress Bar	14	Enabled	<a href="http://www.magento-store.com/sfg/form/index/formid/3/">http://www.magento-store.com/sfg/form/index/formid/3/</a>
<input type="checkbox"/>	4	Poll example	Multi-page form, AJAX, animated results	17	Enabled	<a href="http://www.magento-store.com/sfg/form/index/formid/4/">http://www.magento-store.com/sfg/form/index/formid/4/</a>
<input type="checkbox"/>	5	Quick Enquiry Form	A query tool that quickly collects custom information.	n/a	Enabled	<a href="http://www.magento-store.com/sfg/form/index/formid/5/">http://www.magento-store.com/sfg/form/index/formid/5/</a>


**Upload Forms**

Select File:  No file selected.

## 4.5 Changing Form Status

Only active forms will be available on Frontend.

To change the status select forms in the list and choose the "Update Status" option in the "Mass Actions" dropdown. In the "Status" dropdown choose the status to be applied to the selected forms. Click "Submit".


**Magento Admin**
Create Form

Search

Reset Filter

Update Status

Status

Disabled

Submit

5 records found (1 selected)

20 per page

1 of 1

	#	Form Name	Description	Submissions	Status	Actions	Direct URL to the form
Any	From						
	To						
<input type="checkbox"/>	1	Contact Us Form Example	Sample form. Allows collecting visitors' requests from the external part of the site. Features: * Conditional branching. Displaying states when US is selected * Expanding the form when a new field is added * Protected with Captcha	10	Enabled		<a href="http://www.magento-store.com/sfg/form/index/formid/1/">http://www.magento-store.com/sfg/form/index/formid/1/</a>
<input checked="" type="checkbox"/>	2	PDF Form Example	Ability to fill in the form and convert it into the PDF format. Digital Signature to sign the form.	0	Enabled		<a href="http://www.magento-store.com/sfg/form/index/formid/2/">http://www.magento-store.com/sfg/form/index/formid/2/</a>
<input type="checkbox"/>	3	Quote Form Example	Product Search, AJAX, Progress Bar	14	Enabled		<a href="http://www.magento-store.com/sfg/form/index/formid/3/">http://www.magento-store.com/sfg/form/index/formid/3/</a>
<input type="checkbox"/>	4	Poll example	Multi-page form, AJAX, animated results	17	Enabled		<a href="http://www.magento-store.com/sfg/form/index/formid/4/">http://www.magento-store.com/sfg/form/index/formid/4/</a>
<input type="checkbox"/>	5	Quick Enquiry Form	A query tool that quickly collects custom information.	n/a	Enabled		<a href="http://www.magento-store.com/sfg/form/index/formid/5/">http://www.magento-store.com/sfg/form/index/formid/5/</a>

Upload Forms

Select File:

Browse...


No file selected.

Upload

## 4.6 Deleting Forms

To delete multiple forms select them in the list. Then choose "Delete" in the "Mass Actions" dropdown.

To delete a specific form only choose the "Delete" action next to the form.



DASHBOARD

SALES

PRODUCTS

CUSTOMERS

MARKETING

CONTENT

REPORTS

STORES

SYSTEM

FIND PARTNERS & EXTENSIONS

Magento Admin

Create Form

Search

Reset Filter

Delete

Submit

5 records found (1 selected)

20 per page

1 of 1

	#	Form Name	Description	Submissions	Status	Actions	Direct URL to the form
Any	From						
	To						
<input type="checkbox"/>	1	Contact Us Form Example	Sample form. Allows collecting visitors' requests from the external part of the site. Features: * Conditional branching. Displaying states when US is selected * Expanding the form when a new field is added * Protected with Captcha	10	Enabled	<input type="button" value="Delete"/>	<a href="http://www.magento-store.com/sfg/form/index/formid/1/">http://www.magento-store.com/sfg/form/index/formid/1/</a>
<input checked="" type="checkbox"/>	2	PDF Form Example	Ability to fill in the form and convert it into the PDF format. Digital Signature to sign the form.	0	Enabled	<input type="button" value="Delete"/>	<a href="http://www.magento-store.com/sfg/form/index/formid/2/">http://www.magento-store.com/sfg/form/index/formid/2/</a>
<input type="checkbox"/>	3	Quote Form Example	Product Search, AJAX, Progress Bar	14	Enabled	<input type="button" value="Delete"/>	<a href="http://www.magento-store.com/sfg/form/index/formid/3/">http://www.magento-store.com/sfg/form/index/formid/3/</a>
<input type="checkbox"/>	4	Poll example	Multi-page form, AJAX, animated results	17	Enabled	<input type="button" value="Delete"/>	<a href="http://www.magento-store.com/sfg/form/index/formid/4/">http://www.magento-store.com/sfg/form/index/formid/4/</a>
<input type="checkbox"/>	5	Quick Enquiry Form	A query tool that quickly collects custom information.	n/a	Enabled	<input type="button" value="Delete"/>	<a href="http://www.magento-store.com/sfg/form/index/formid/5/">http://www.magento-store.com/sfg/form/index/formid/5/</a>

Upload Forms

Select File:  No file selected.





### 5.1.1 Filtering Submissions

All submissions can be easily filtered by specified fields in the Database. Fields that are bound to the Database will appear on the "Filters" panel.

The screenshot displays the Magento Admin interface. On the left is a sidebar with navigation links: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area is titled 'Magento Admin' and includes a search bar, a notification bell, and a user profile dropdown labeled 'admin'. Below these are tabs for 'Filters', 'Default View', and 'Columns'. The 'Filters' panel is highlighted with an orange border and contains the following fields:

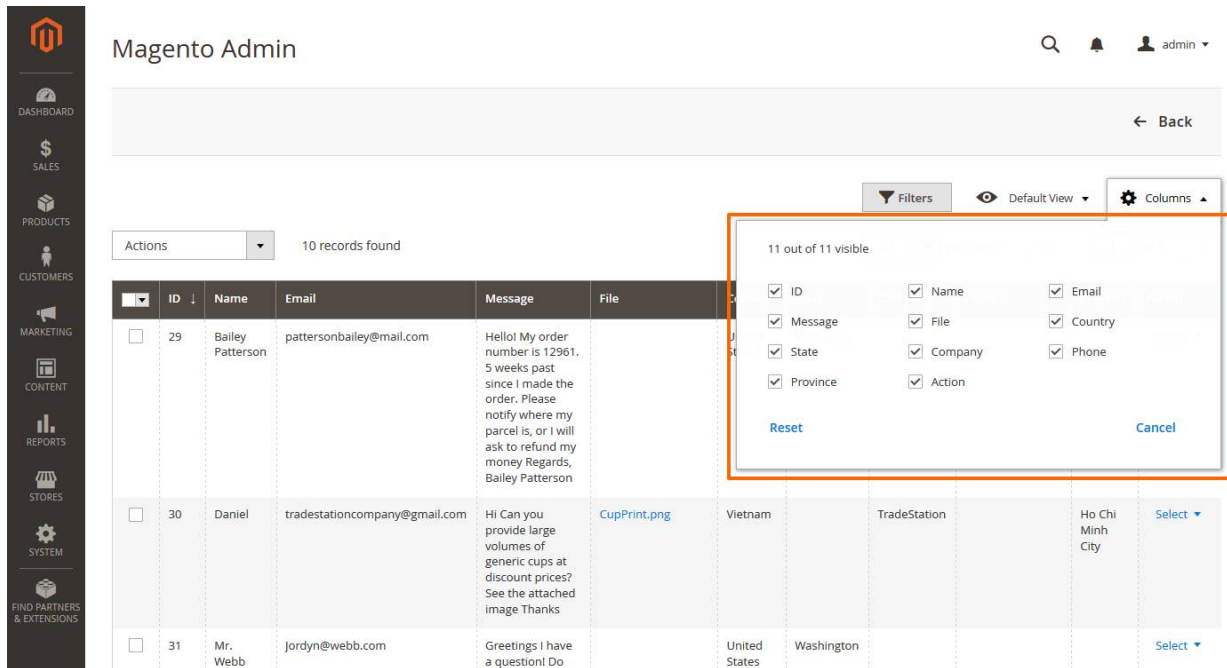
- ID: from [input field]
- Name: [input field]
- Email: [input field]
- Message: [input field]
- to: [input field]
- File: [input field]
- Country: [input field]
- State: [input field]
- Company: [input field]
- Phone: [input field]
- Province: [input field]

Below the filters, there are 'Cancel' and 'Apply Filters' buttons. At the bottom, a table header is visible with columns: ID, Name, Email, Message, File, Country, State, Company, Phone, Province, and Action. The table indicates '10 records found' and shows '20 per page' with pagination controls.

### 5.1.2 Selecting Columns

The list allows you to select visible columns. By default all columns are visible on the grid.

To hide multiple or certain columns, clear unnecessary checkboxes next to the titles.



Magento Admin

10 records found

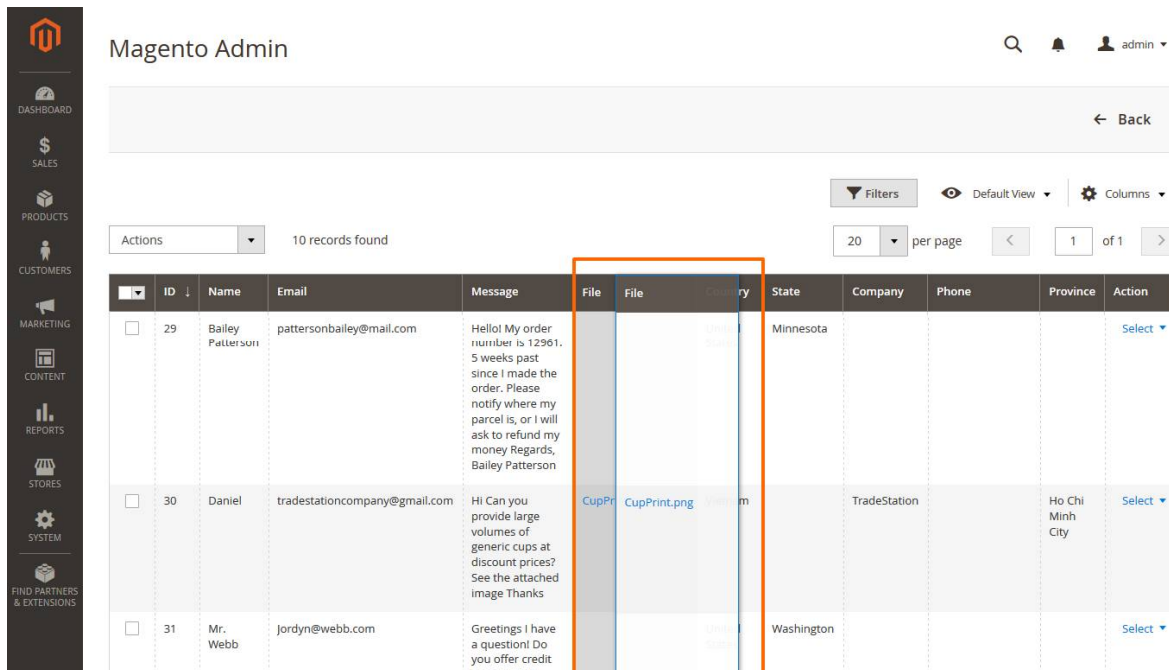
Columns selection dialog:

- 11 out of 11 visible
- ☒ ID
- ☒ Name
- ☒ Email
- ☒ Message
- ☒ File
- ☒ Country
- ☒ State
- ☒ Company
- ☒ Phone
- ☒ Province
- ☒ Action

Reset Cancel

ID	Name	Email	Message	File	Country	State	Company	Phone	Province	Action
29	Bailey Patterson	pattersonbailey@mail.com	Hello! My order number is 12961. 5 weeks past since I made the order. Please notify where my parcel is, or I will ask to refund my money Regards, Bailey Patterson							Select
30	Daniel	tradestationcompany@gmail.com	Hi Can you provide large volumes of generic cups at discount prices? See the attached image Thanks	CupPrint.png	Vietnam		TradeStation		Ho Chi Minh City	Select
31	Mr. Webb	jordyn@webb.com	Greetings I have a question! Do you offer credit		United States	Washington				Select

There is also ability to move the columns on the grid by dragging and dropping them to the necessary place.



Magento Admin

10 records found

Columns selection dialog:

- 11 out of 11 visible
- ☒ ID
- ☒ Name
- ☒ Email
- ☒ Message
- ☒ File
- ☒ Country
- ☒ State
- ☒ Company
- ☒ Phone
- ☒ Province
- ☒ Action

Reset Cancel

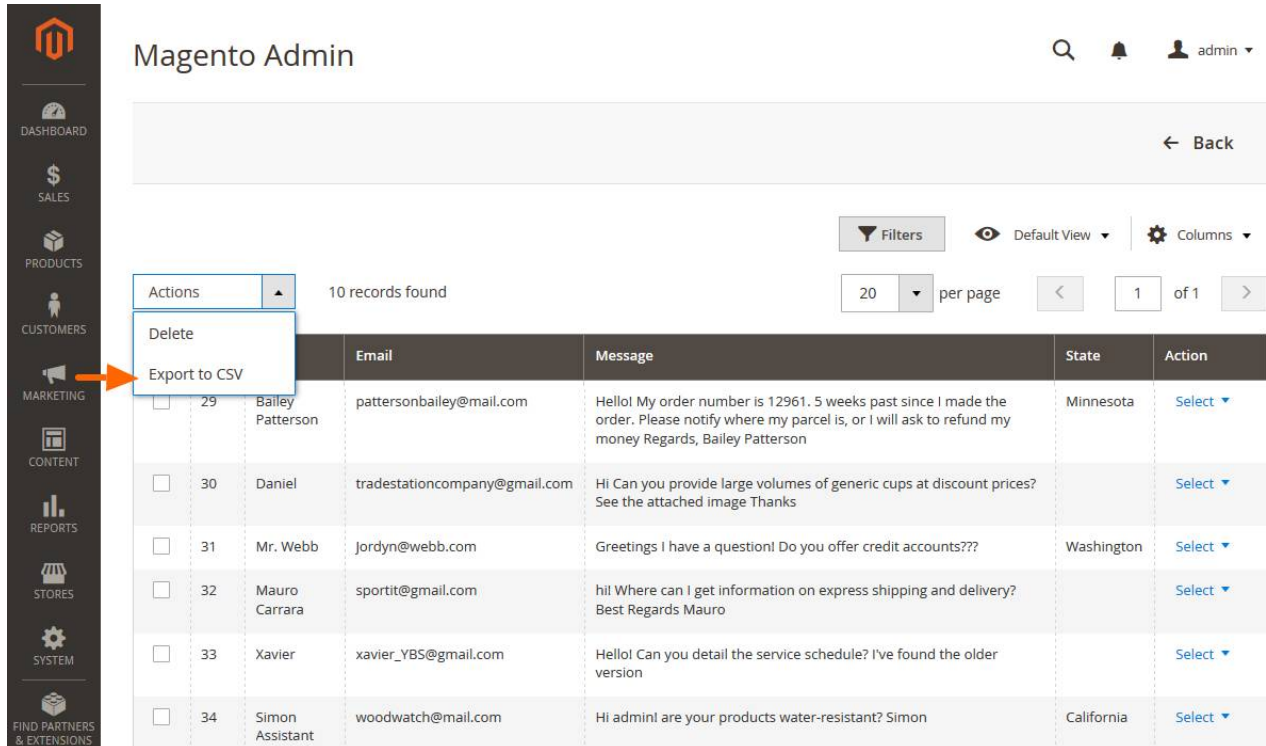
ID	Name	Email	Message	File	File	Country	State	Company	Phone	Province	Action
29	Bailey Patterson	pattersonbailey@mail.com	Hello! My order number is 12961. 5 weeks past since I made the order. Please notify where my parcel is, or I will ask to refund my money Regards, Bailey Patterson			United States	Minnesota				Select
30	Daniel	tradestationcompany@gmail.com	Hi Can you provide large volumes of generic cups at discount prices? See the attached image Thanks	CupPr	CupPrint.png	Vietnam		TradeStation		Ho Chi Minh City	Select
31	Mr. Webb	jordyn@webb.com	Greetings I have a question! Do you offer credit			United States	Washington				Select

### 5.1.3 Exporting to CSV

The extension allows to export submissions via a CSV file. Thus all customers' data will be saved in a table structured format locally.

To export data via CSV applied to multiple submissions select submissions and choose option "Export to CSV" in dropdown "Mass Actions".

To export a particular submission to CSV choose option "CSV" in column Action next to the submission.



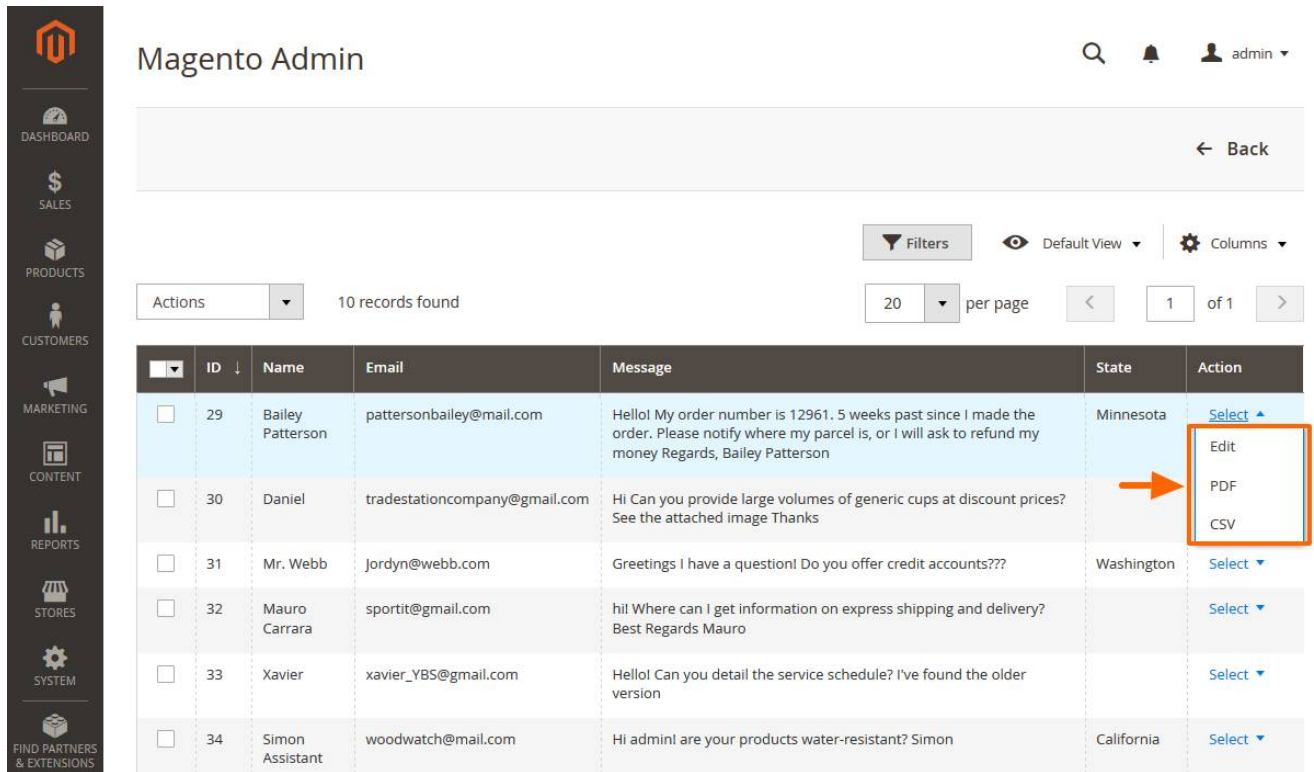
The screenshot shows the Magento Admin interface. On the left is a sidebar with navigation links: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main content area is titled 'Magento Admin' and shows a table of submissions. The table has columns for 'Email', 'Message', 'State', and 'Action'. The 'Action' column for each row contains a 'Select' dropdown menu. An orange arrow points to the 'Export to CSV' option in the 'Mass Actions' dropdown menu.

Actions	Email	Message	State	Action
<input type="checkbox"/> 29 Bailey Patterson	pattersonbailey@mail.com	Hello! My order number is 12961. 5 weeks past since I made the order. Please notify where my parcel is, or I will ask to refund my money Regards, Bailey Patterson	Minnesota	Select ▼
<input type="checkbox"/> 30 Daniel	tradestationcompany@gmail.com	Hi Can you provide large volumes of generic cups at discount prices? See the attached image Thanks		Select ▼
<input type="checkbox"/> 31 Mr. Webb	Jordyn@webb.com	Greetings I have a question! Do you offer credit accounts???	Washington	Select ▼
<input type="checkbox"/> 32 Mauro Carrara	sportit@gmail.com	hi! Where can I get information on express shipping and delivery? Best Regards Mauro		Select ▼
<input type="checkbox"/> 33 Xavier	xavier_YBS@gmail.com	Hello! Can you detail the service schedule? I've found the older version		Select ▼
<input type="checkbox"/> 34 Simon Assistant	woodwatch@mail.com	Hi admin! are your products water-resistant? Simon	California	Select ▼

### 5.1.4 Exporting to PDF

The SmartFormer Gold extension allows to export submissions to a PDF file.

To export submission to PDF choose "PDF" in column Action next to the submission.

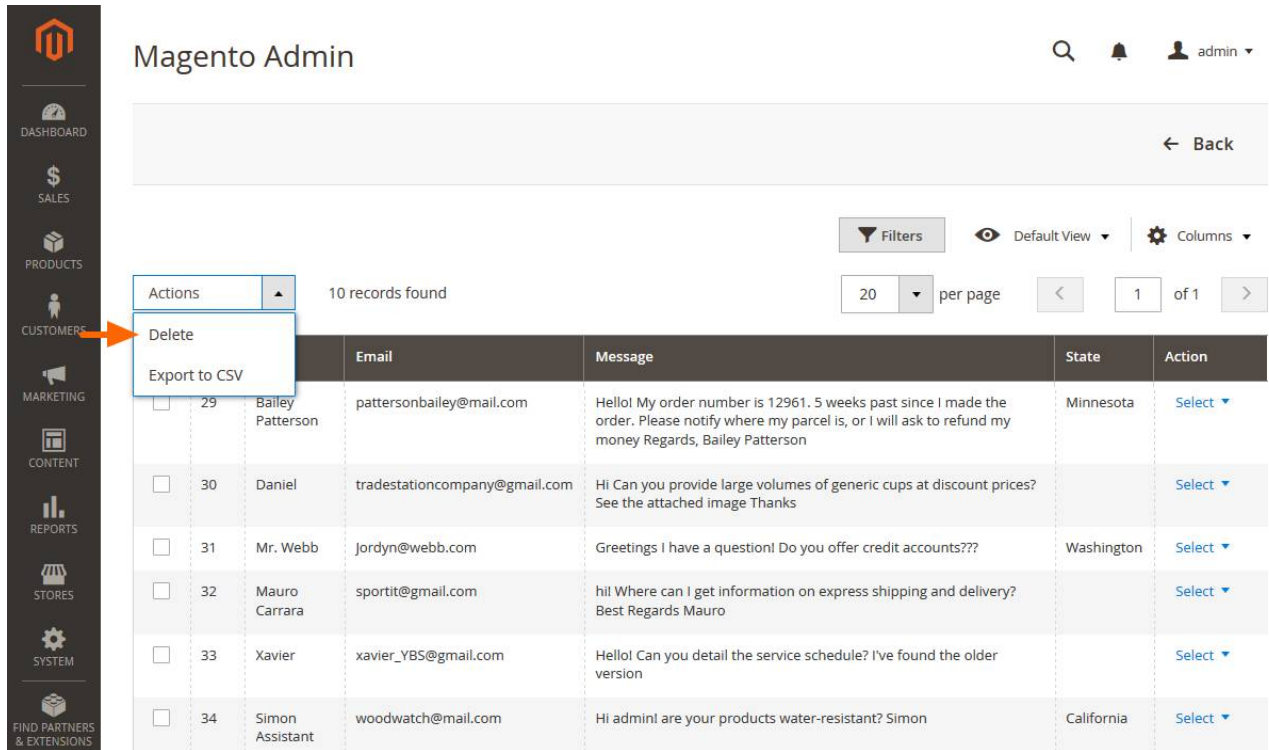


The screenshot shows the Magento Admin interface. On the left is a sidebar with navigation links: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main header says "Magento Admin" with search, notification, and user icons. Below the header is a "Back" button. The main content area shows a table of submissions with columns: ID, Name, Email, Message, State, and Action. The table has 10 records. The first record (ID 29) is highlighted. The "Action" column for this record shows a dropdown menu with options: Select, Edit, PDF, and CSV. An orange arrow points to the "PDF" option.

ID	Name	Email	Message	State	Action
29	Bailey Patterson	pattersonbailey@mail.com	Hello! My order number is 12961. 5 weeks past since I made the order. Please notify where my parcel is, or I will ask to refund my money Regards, Bailey Patterson	Minnesota	Select Edit PDF CSV
30	Daniel	tradestationcompany@gmail.com	Hi Can you provide large volumes of generic cups at discount prices? See the attached image Thanks		
31	Mr. Webb	Jordyn@webb.com	Greetings I have a question! Do you offer credit accounts???	Washington	Select
32	Mauro Carrara	sportit@gmail.com	hi! Where can I get information on express shipping and delivery? Best Regards Mauro		Select
33	Xavier	xavier_YBS@gmail.com	Hello! Can you detail the service schedule? I've found the older version		Select
34	Simon Assistant	woodwatch@mail.com	Hi admin! are your products water-resistant? Simon	California	Select

### 5.1.5 Deleting Submissions

To delete multiple submissions, choose option "Delete" in dropdown "Mass Actions".



The screenshot shows the Magento Admin interface. On the left is a sidebar with navigation links: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The 'CUSTOMERS' link is highlighted with an orange arrow. The main content area is titled 'Magento Admin' and shows a table of customer submissions. Above the table, there are controls for 'Filters', 'Default View', 'Columns', and a pagination bar showing '20 per page' and '1 of 1'. A dropdown menu labeled 'Actions' is open, showing two options: 'Delete' and 'Export to CSV'. The table has columns for 'Email', 'Message', 'State', and 'Action'. There are 10 records found.

			Email	Message	State	Action
<input type="checkbox"/>	29	Bailey Patterson	pattersonbailey@mail.com	Hello! My order number is 12961. 5 weeks past since I made the order. Please notify where my parcel is, or I will ask to refund my money Regards, Bailey Patterson	Minnesota	Select ▼
<input type="checkbox"/>	30	Daniel	tradestationcompany@gmail.com	Hi Can you provide large volumes of generic cups at discount prices? See the attached image Thanks		Select ▼
<input type="checkbox"/>	31	Mr. Webb	Jordyn@webb.com	Greetings I have a question! Do you offer credit accounts???	Washington	Select ▼
<input type="checkbox"/>	32	Mauro Carrara	sportit@gmail.com	hi! Where can I get information on express shipping and delivery? Best Regards Mauro		Select ▼
<input type="checkbox"/>	33	Xavier	xavier_YBS@gmail.com	Hello! Can you detail the service schedule? I've found the older version		Select ▼
<input type="checkbox"/>	34	Simon Assistant	woodwatch@mail.com	Hi admin! are your products water-resistant? Simon	California	Select ▼

## 5.2 Editing Submissions

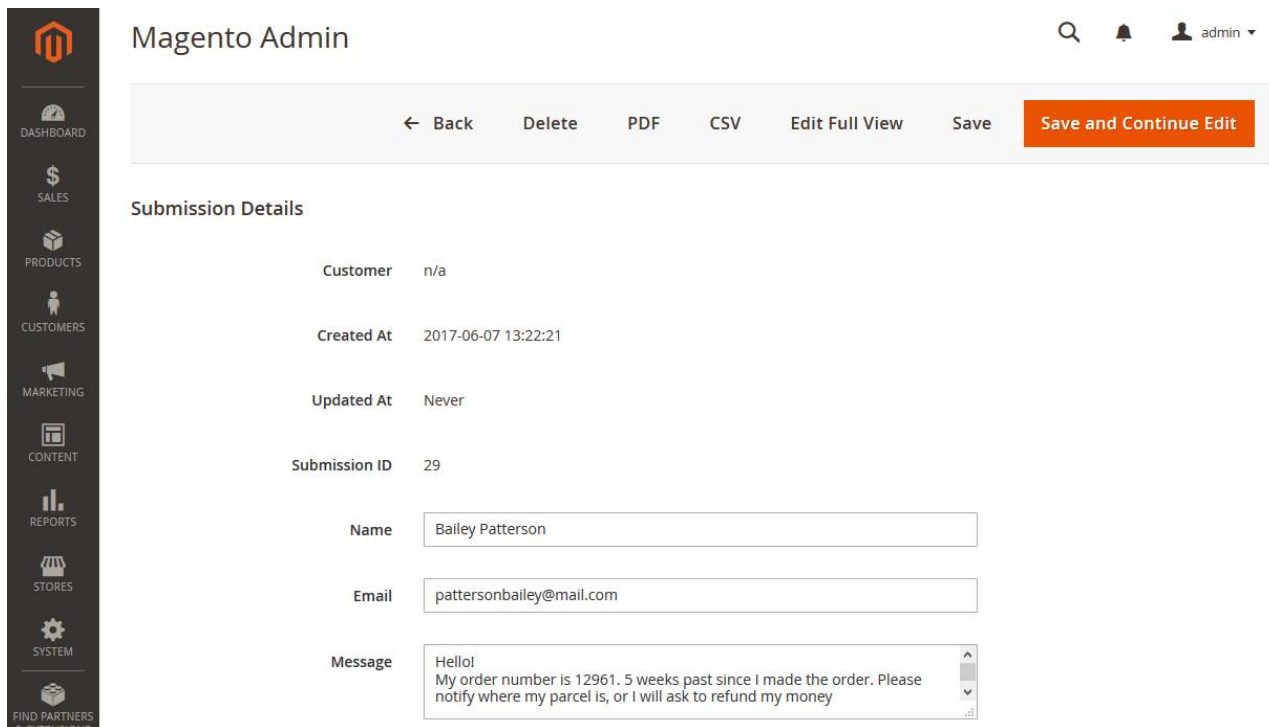
To edit a submission choose "Edit" in dropdown "Select".

You can edit the whole information submitted by the customer. The data can also be managed on Frontend. Button "**Edit Full View**" will open the form in the full view.

Each submission can be removed individually. Click the "**Delete**" button in the menu bar.

Also submission can be exported either to a **CSV** or a **PDF** file. The buttons are available in the toolbar.

To save the submission click buttons "Save" or "Save and Continue Edit".



The screenshot displays the Magento Admin interface. On the left is a vertical sidebar with icons for Dashboard, Sales, Products, Customers, Marketing, Content, Reports, Stores, System, and Find Partners & Extensions. The main header area shows 'Magento Admin' on the left and search, notification, and user (admin) icons on the right. Below the header is a toolbar with buttons: Back, Delete, PDF, CSV, Edit Full View, Save, and a prominent orange 'Save and Continue Edit' button. The 'Submission Details' section contains the following information:

- Customer:** n/a
- Created At:** 2017-06-07 13:22:21
- Updated At:** Never
- Submission ID:** 29
- Name:** Bailey Patterson
- Email:** pattersonbailey@mail.com
- Message:** Hello!  
My order number is 12961. 5 weeks past since I made the order. Please notify where my parcel is, or I will ask to refund my money



## 6. Publishing Forms

There are several ways to make forms visible for customers on Frontend by using direct link, adding widget, or publishing Form via XML layout.

### 6.1 Accessing Form via Direct URL

The direct URL link for each form is available next to the form on the list of forms. You can use the URL to create a link in a CMS page, static block, or in a phtml file.

For instance, you can change URL of the contact form in the footer. Simply open the footer static block and replace the link URL with the form's direct URL.

### 6.2 Inserting Form into CMS or Static Block

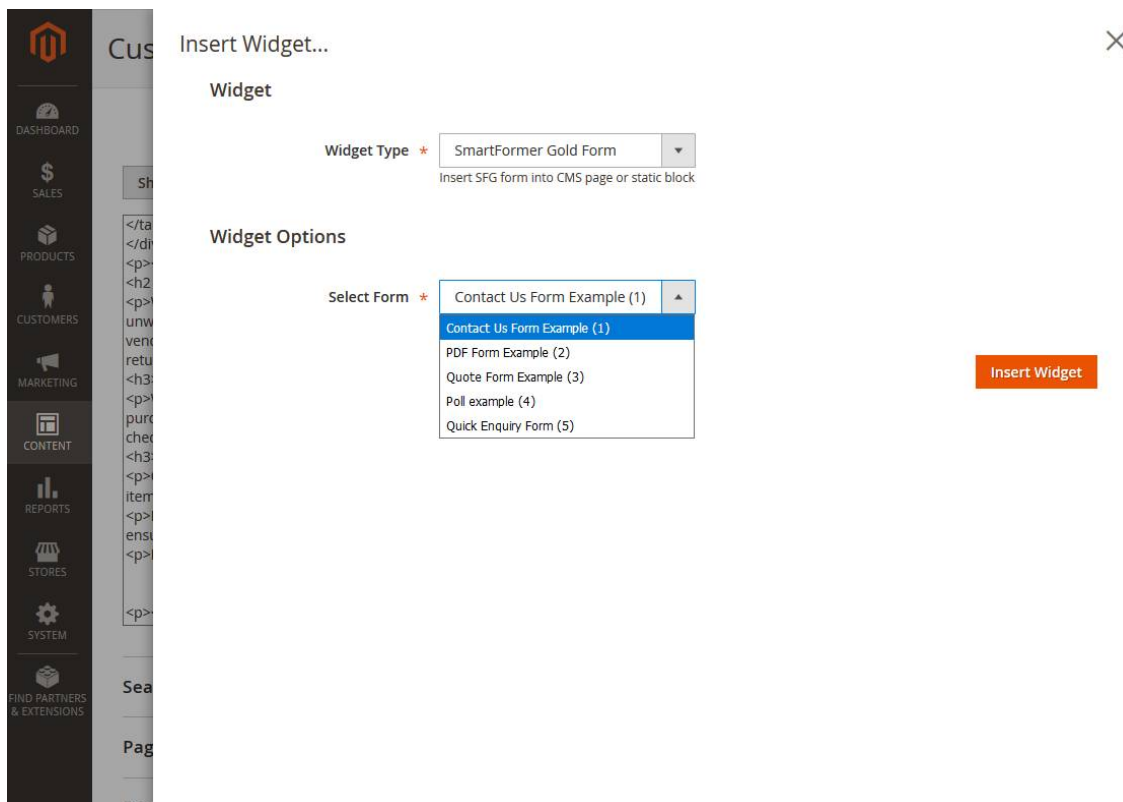
Inserting the form into a CMS page or a Static Block can be done via widget.

Click the "Insert Widget" button in the WYSIWYG. Then select "SmartFormer Gold Form" in the list of widgets and choose the form name you want to publish.

Alternatively, you can paste the following line within the text:

```
{{widget type="Itoris\SmartFormerGold\Block\Widget\Block" form_id="1"}}
```

where number "1" is the ID of the form.



## 6.3 Publishing Form via XML layout

There is also ability to place the form in the header or footer or in any other places of layout.

Use the following piece for the XML layout file:

```
<block class="Itoris\SmartFormerGold\Block\Form" name="my_form" cacheable="false">  
    <action method="setFormId">  
        <argument name="formid" xsi:type="number">1</argument>  
    </action>  
</block>
```

The form ID should be specified in the "formid" argument.

## 7. Managing Submissions by Customer

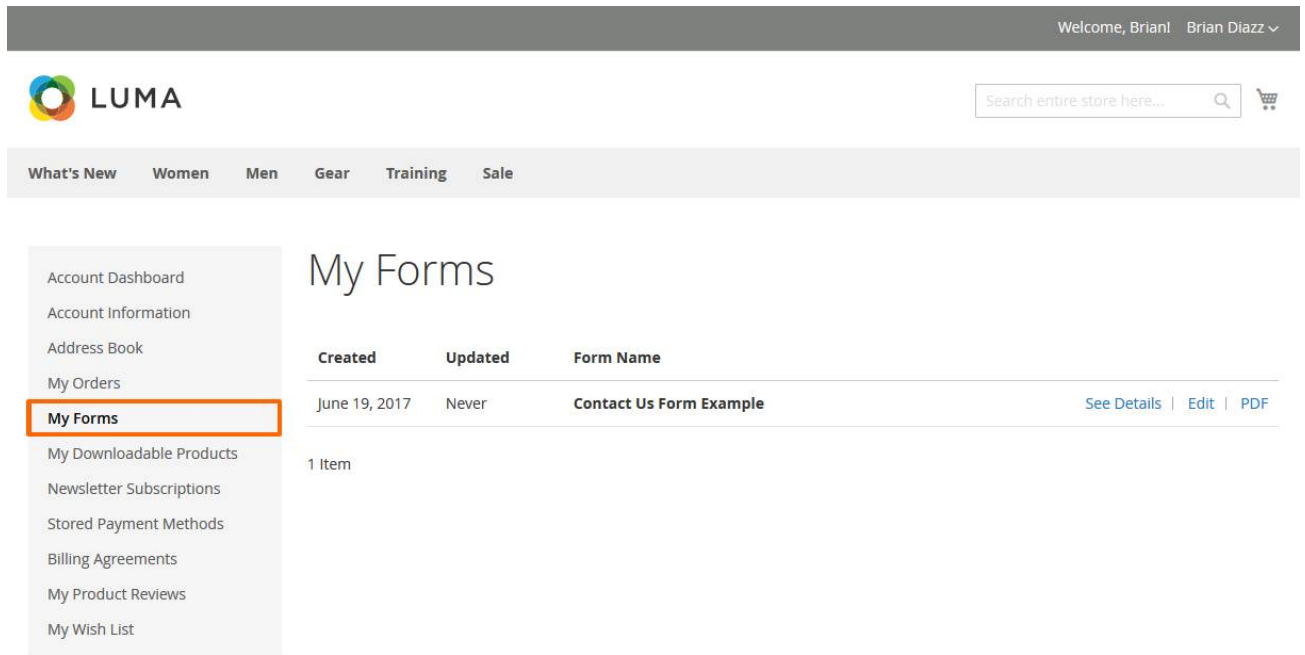
Each customer submitted the form has the separate section "My Forms" in the account. There is a list of submitted forms that can be easily managed by users.

The list has the following columns

**Created** – shows the date when the form was submitted.

**Updated** – shows the date when the form was updated. If there are no updates, label "Never" is shown.

**Form Name** – shows the title of submitted form. The title is specified in Backend.



Top navigation bar: Welcome, Brian! Brian Diazz v

Search bar: Search entire store here...

Navigation links: What's New Women Men Gear Training Sale

Account Dashboard

Account Information

Address Book

My Orders

**My Forms**

My Downloadable Products

Newsletter Subscriptions

Stored Payment Methods

Billing Agreements

My Product Reviews

My Wish List

### My Forms

Created	Updated	Form Name	
June 19, 2017	Never	Contact Us Form Example	<a href="#">See Details</a>   <a href="#">Edit</a>   <a href="#">PDF</a>

1 Item


Three more links are available:

**See Details** – the customer is provided with the full submitted information.


**Edit** – the customer is redirected to the form with ability to edit the information.

**PDF** – the submitted information is converted into the PDF file to be saved locally.

Welcome, Brian!  
Brian Diazz



Search entire store here...



What's NewWomenMenGearTrainingSale

Account Dashboard

Account Information

Address Book

My Orders

**My Forms**

My Downloadable Products

Newsletter Subscriptions

Stored Payment Methods

Billing Agreements

My Product Reviews

My Wish List

## My Form

Back to Forms

Convert to PDFEdit Form

Form	Contact Us Form Example
Created At	June 19, 2017
Updated At	Never
Name	Brian Diazz
Email	
Message	Greetings! Do you offer gift certificates?
File	
Country	United States
State	Tennessee
Company	Diazz

Compare Products

You have no items to compare.