

Smart Former Gold for Magento

Quick Start

version 1.0

created by "IToris"
Project Team

IToris company

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1. Introduction

1.1. Purpose

This document is a **Quick Start for SmartFormer Gold for Magento**. Step by step it describes how to create a new form from scratch, bind it to DB, create email notifications, check submissions and add it to a website. It provides a detailed instruction and plenty of screenshots.

This Quick Start does not cover all cases neither does it provide a detailed description of all settings and features available in SmartFormer Gold. For detailed information please check User Guide.

This guide provides a general idea of how forms should be created and describes the order of creation a form.

2. Work with SmartFormer Gold

2.1. Quick start

Below there is an instruction of how to create a new form from scratch.

2.1.1. Create form's skeleton

Open SmartFormer Gold in admin area. Press **New** button to create a new form.

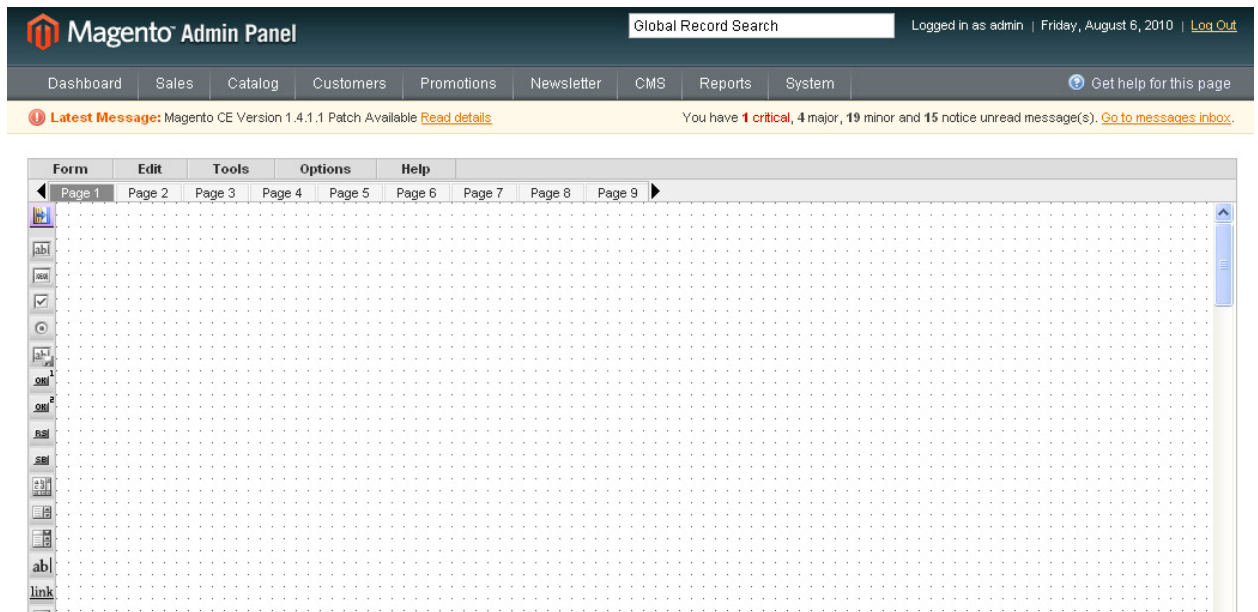
Form Manager

#	Form Name	Description	Records	Active	Actions	Direct URL to the form
1	Survey Form		no db	Unpublished	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/1/
2	Payment Form		no db	Unpublished	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/2/
3	Registration Form		no db	Unpublished	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/3/

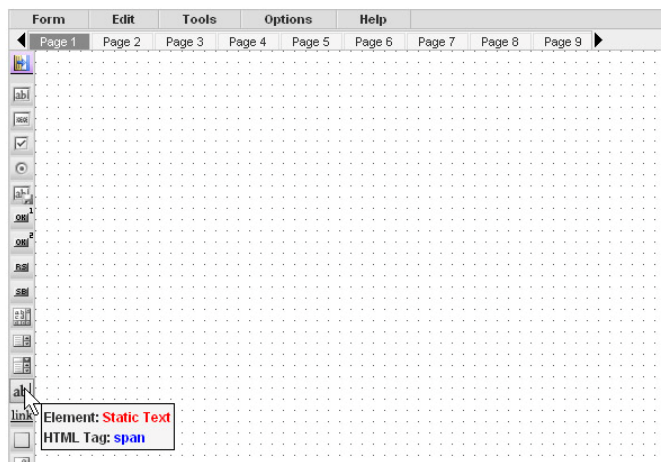
Upload form: [Browse...](#) [Upload](#)

Items per page : 20

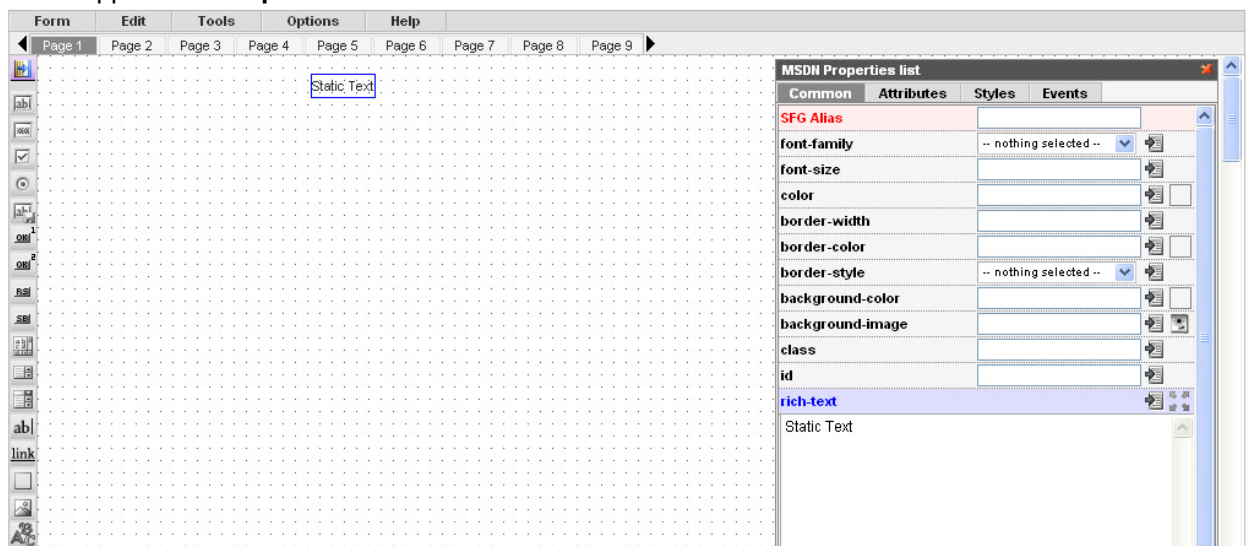
You will see **SmartFormer Gold's Working area**. On the right there are form elements to be added.



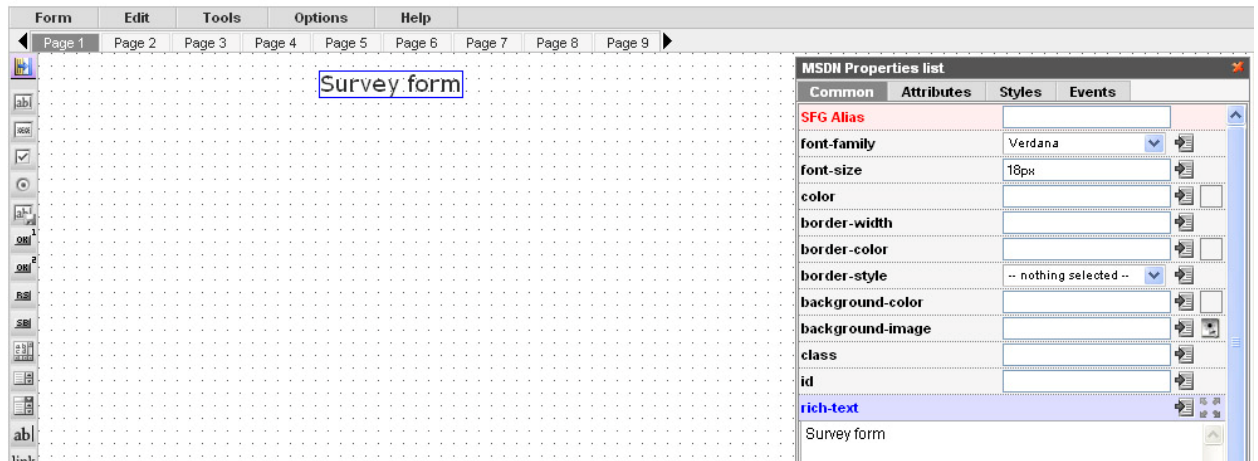
Select **Static Text** element to create a title of the form and drag it to the Working area.



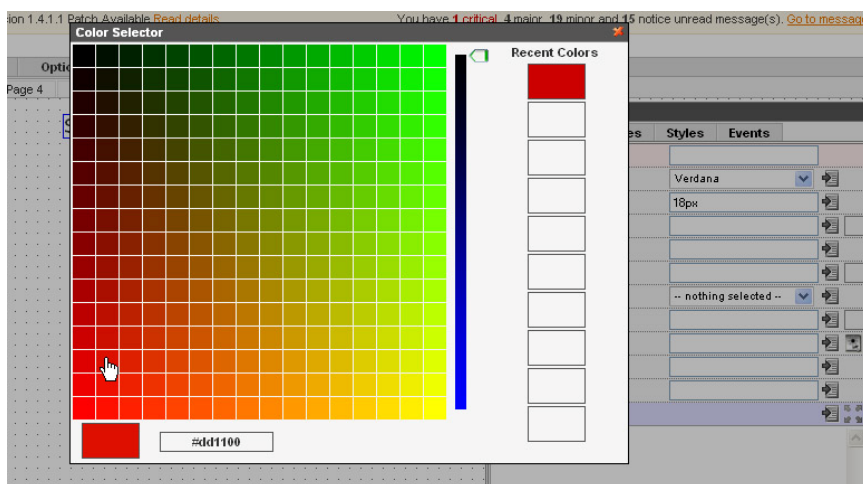
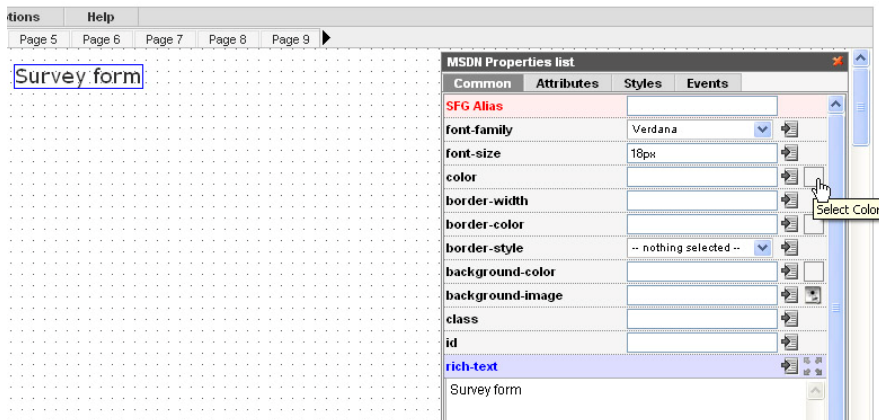
There will appear the **Properties Box** of the element.

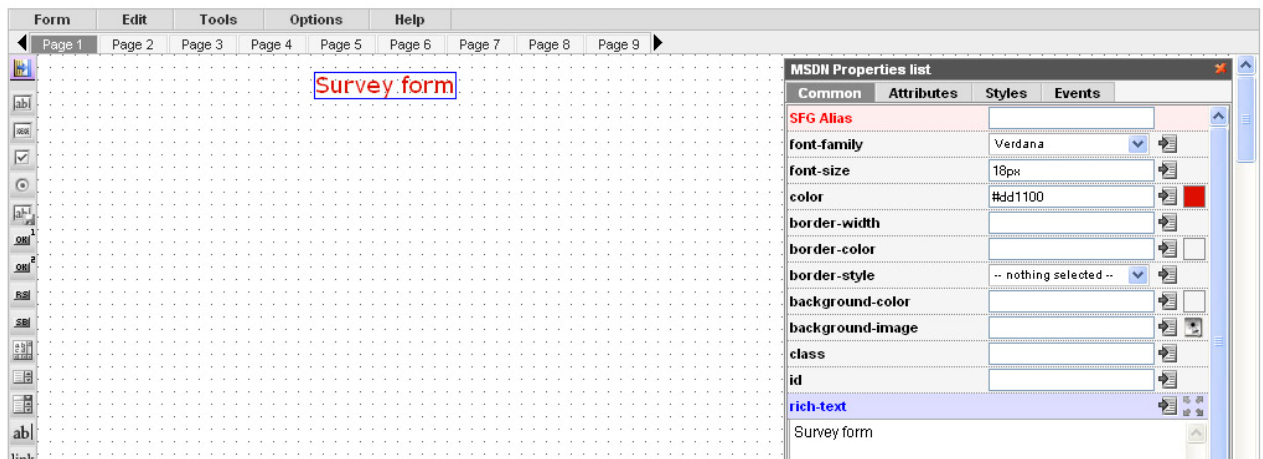


Enter the title (where you see “Static Text”). Select a font (**font-family**), enter font size in pixels (**font-size**). All changes will be applied immediately.

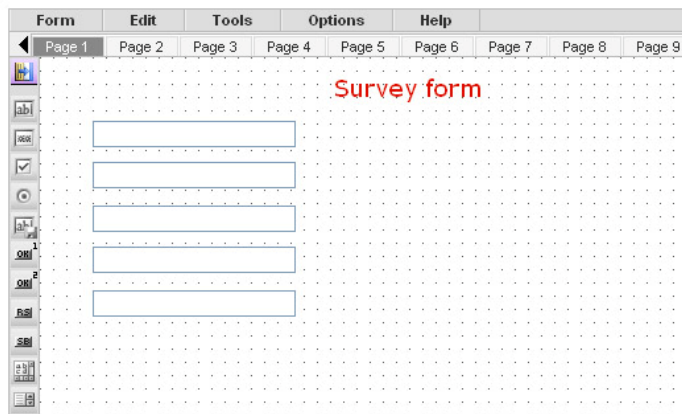
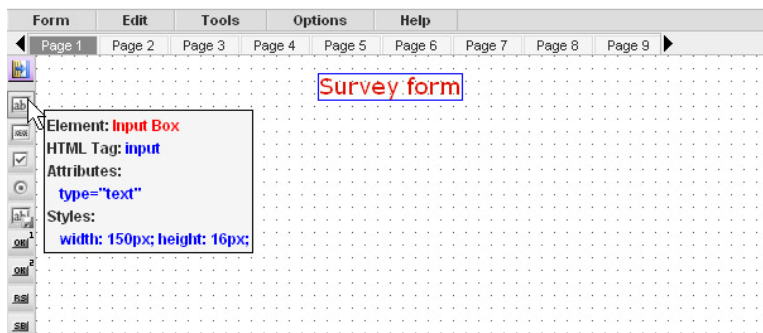


Let us also change the color of the title. To do it click the icon near **color** field. You will see **Color Selector**. Select a color.





Now let us add several **Input boxes**. Drag them to the working area.



Add text labels (**Static Text** element) to them. This should be done the same way as with the title.

The screenshot shows the Itoris Form Designer interface. The top menu bar includes 'Form', 'Edit', 'Tools', 'Options', and 'Help'. Below the menu is a page navigation bar with tabs for 'Page 1' through 'Page 8'. The main workspace is a grid with a dotted background. On the left is a vertical toolbar with various form elements. The form being designed is titled 'Survey form' in red. It contains five text input fields, each with a corresponding label in red text to its right: 'Your first name', 'Your surmane', 'Your middle name', 'Your address', and 'Your city'.

Let us add a drop down with the list of US states. Select **Select Box** element. Enter its options (states).

This screenshot shows the 'Select Box' element being added to the form. A tooltip is visible over the 'Select Box' icon in the toolbar, displaying the following information: 'Element: Select Box', 'HTML Tag: select', and 'Styles: width: 150px; height: 21px;'. The form in the background has five text input fields and a new dropdown menu at the bottom labeled '~ Select a state ~'.

This screenshot shows the 'Select Box' element with a list of US states. The form in the background has five text input fields and a dropdown menu labeled '~ Select a state ~'. The dropdown menu is expanded, showing a list of US states: 0) ~ Select a state ~, 1) Alabama, 2) Alaska, 3) American Samoa, 4) Arizona, 5) Arkansas, 6) California, 7) Colorado, 8) Connecticut, and 9) Delaware. On the right side of the interface, the 'MSDN Properties list' is open, showing the 'Common' tab with various properties like 'font-family', 'font-size', 'color', 'background-color', 'class', 'id', 'name', 'value', 'required', and 'select-list'.

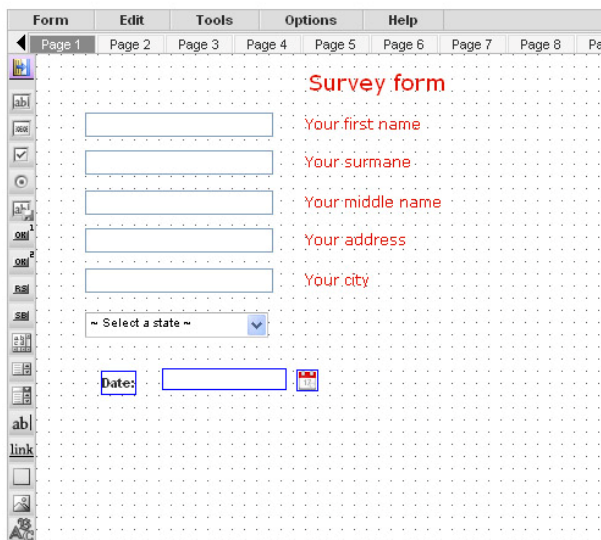
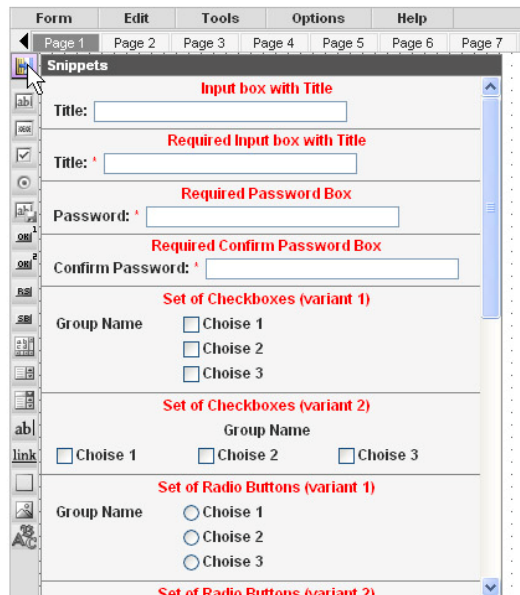
Add options in the following way:

Please, visit us at: <http://www.itoris.com> or contact directly by email: sales@itoris.com

0| value
1| value
2| value
Etc.

0 – this option can not be selected. It can be used for some description (Please select). **Value** is what users will see.

We will also add an input box with a calendar for users to select a date. This can be dragged from **Snippets** (combinations of most used elements). Click Snippets icon to see the list of snippets. Find **Calendar Box with Title** snippet and drag it to the working area.



Unselect date snippet (click any other place on the working area). Then select and delete its label ("date") - press Del on your keyboard (we delete the label and create a new one of our own style).

Any element of a snippet can be deleted separately.

Adjust input box (select it and stretch) so that it suits the rest of elements.

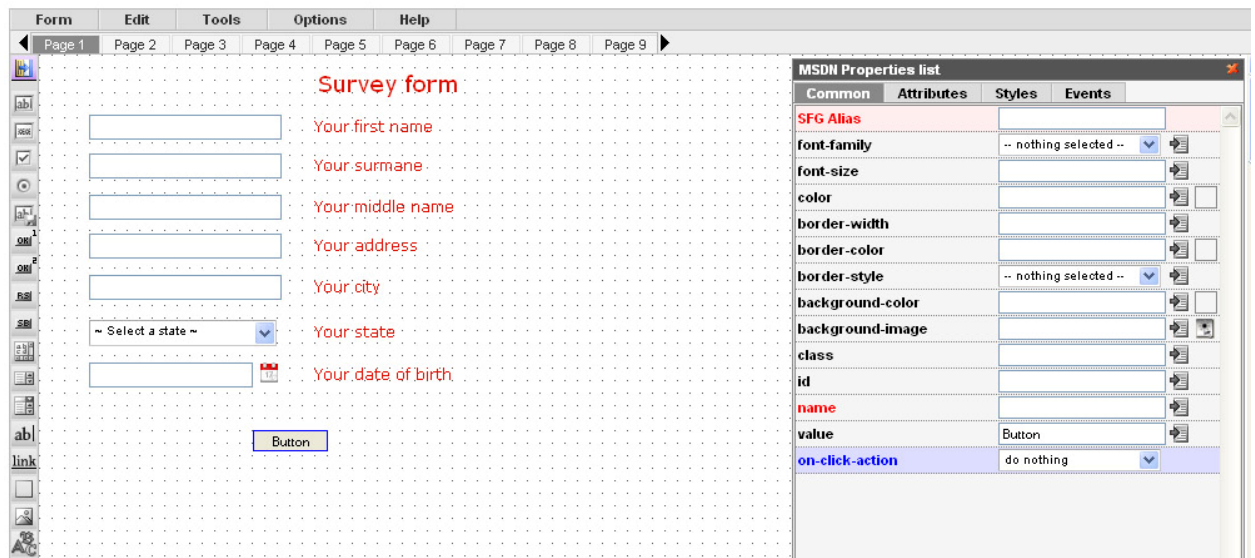
The screenshot shows the Itoris form builder interface. The top menu bar includes 'Form', 'Edit', 'Tools', 'Options', and 'Help'. Below the menu is a tabbed interface with 'Page 1' through 'Page 7'. The main workspace is a grid with a dotted background. On the left is a vertical toolbar with various form elements. The form being built is titled 'Survey form' in red. It contains the following fields: 'Your first name', 'Your surname', 'Your middle name', 'Your address', 'Your city', a dropdown menu labeled '~ Select a state ~', and a date picker labeled 'Your date of birth'.

Add text labels to the drop down and input calendar.

This screenshot shows the same 'Survey form' as the previous one, but with additional text labels added to the dropdown and date picker. The dropdown menu is now labeled 'Your state' and the date picker is labeled 'Your date of birth'.

Add **Button (type 1)**.

This screenshot shows the 'Survey form' with a new button added. A tooltip is visible over the button element, displaying the following information: 'Element: Button (type 1)', 'HTML Tag: input', 'Attributes: type="button" value="Button"', and 'Styles: width: 60px;'. The button is located below the 'Your date of birth' field.



Form Edit Tools Options Help

Page 1 Page 2 Page 3 Page 4 Page 5 Page 6 Page 7 Page 8 Page 9

Survey form

Your first name

Your surname

Your middle name

Your address

Your city

~ Select a state ~

Your state

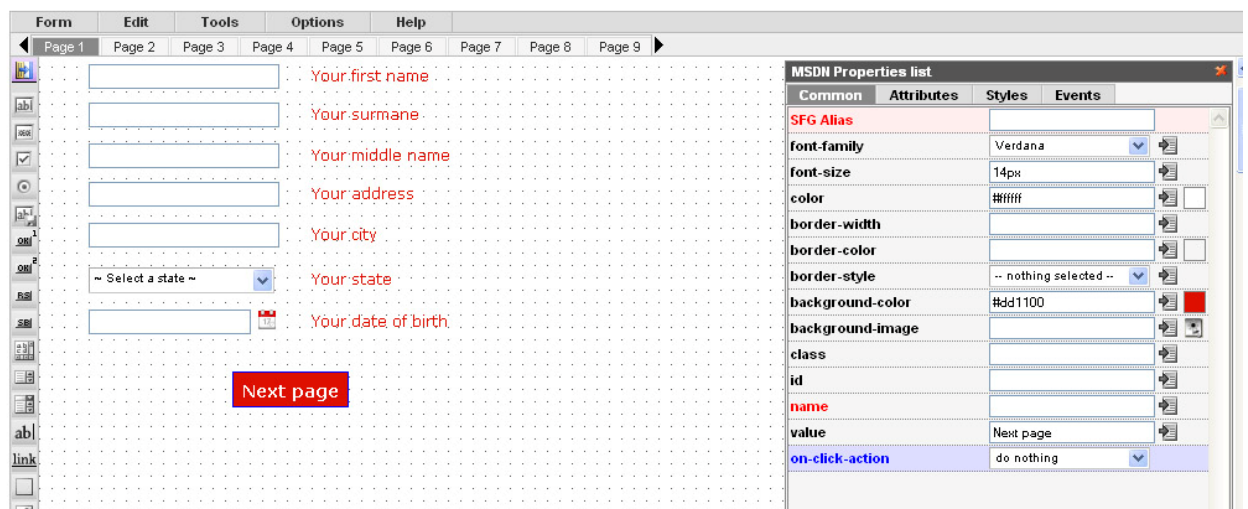
Your date of birth

Button

MSDN Properties list

Common	Attributes	Styles	Events
SFG Alias			
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	-- nothing selected --		
value	Button		
on-click-action	do nothing		

Add styles to it.



Form Edit Tools Options Help

Page 1 Page 2 Page 3 Page 4 Page 5 Page 6 Page 7 Page 8 Page 9

Your first name

Your surname

Your middle name

Your address

Your city

~ Select a state ~

Your state

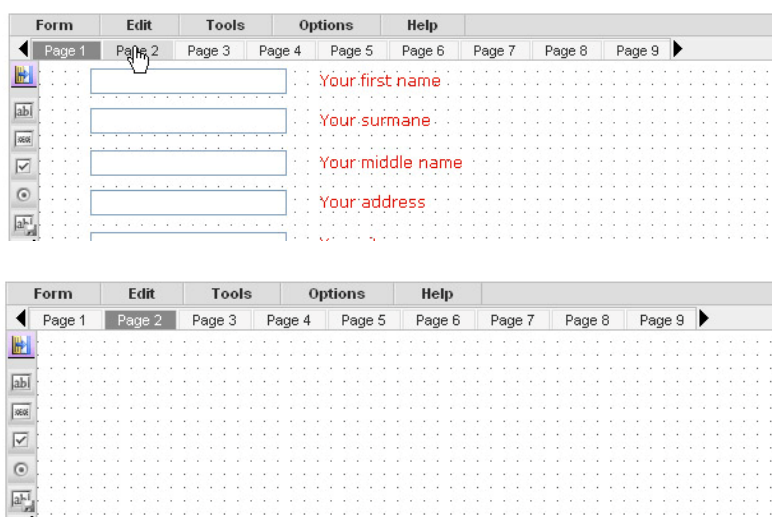
Your date of birth

Next page

MSDN Properties list

Common	Attributes	Styles	Events
SFG Alias			
font-family	Verdana		
font-size	14px		
color	#ffffff		
border-width	-- nothing selected --		
border-color	-- nothing selected --		
border-style	-- nothing selected --		
background-color	#dd1100		
background-image	-- nothing selected --		
class	-- nothing selected --		
id	-- nothing selected --		
name	-- nothing selected --		
value	Next page		
on-click-action	do nothing		

Now open the **Page 2** of the form



Form Edit Tools Options Help

Page 1 Page 2 Page 3 Page 4 Page 5 Page 6 Page 7 Page 8 Page 9

Your first name

Your surname

Your middle name

Your address

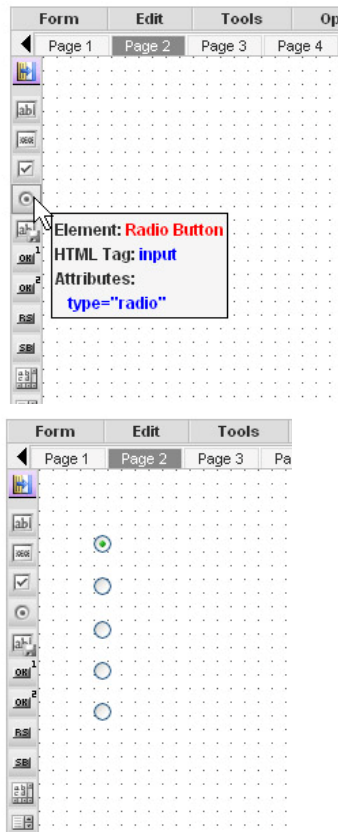
Next page

Form Edit Tools Options Help

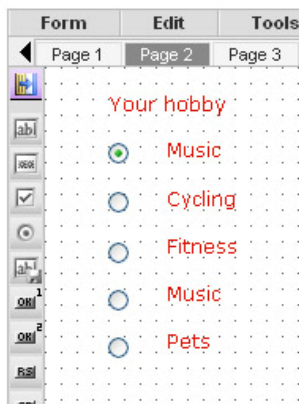
Page 1 Page 2 Page 3 Page 4 Page 5 Page 6 Page 7 Page 8 Page 9

And continue there. Add a group of **Radio buttons** (several radio buttons one by one).

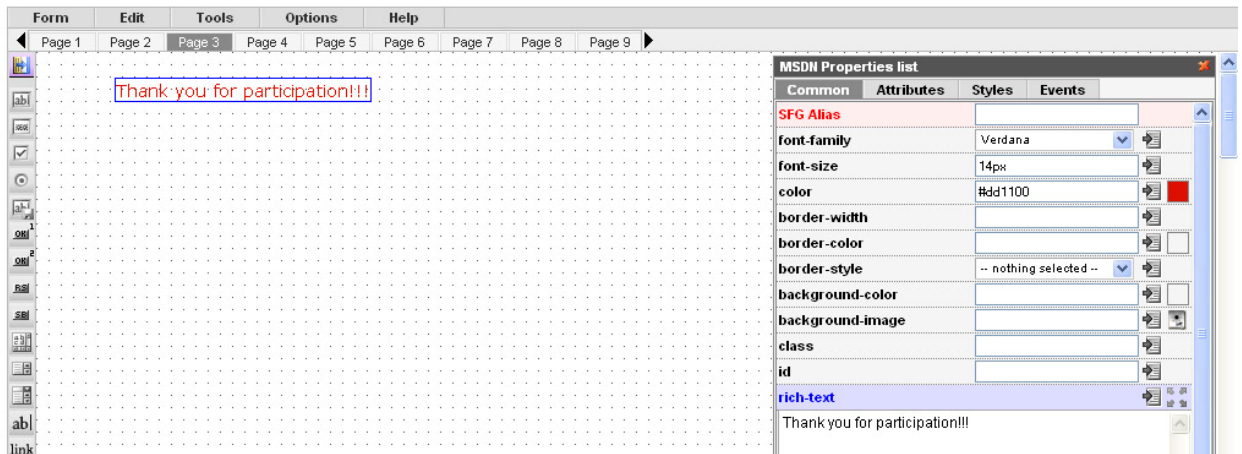
Please, visit us at: <http://www.itoris.com> or contact directly by email: sales@itoris.com



Add title and labels to them



Add a button to this page as well and open **Page 3**. This page will contain only “Thank you” message. Add Static Text and style it.



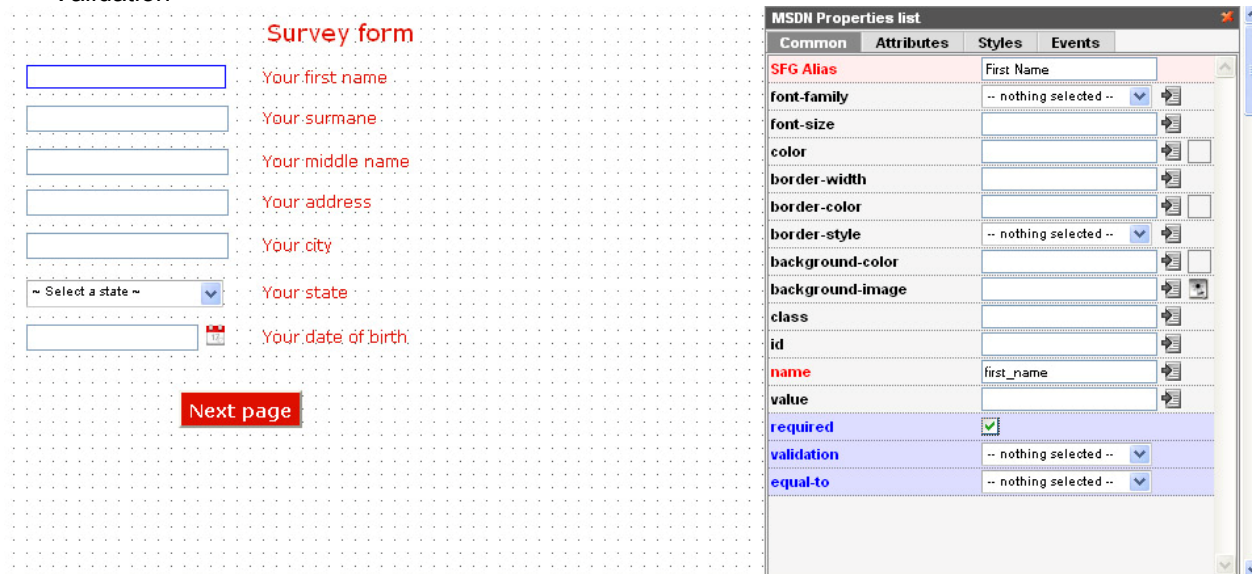
Our skeleton is ready. Let us continue.

2.1.2. Set the properties of elements

Now there goes a very important part. We should apply settings to our elements so that they behave the way we need.

Let us press **Page 1** again and select the first input box. The most important settings are:

- SmartFormer Gold Alias
- Name
- Required
- Validation



SmartFormer Gold Alias will be used for email templates. Add a meaningful name to it.

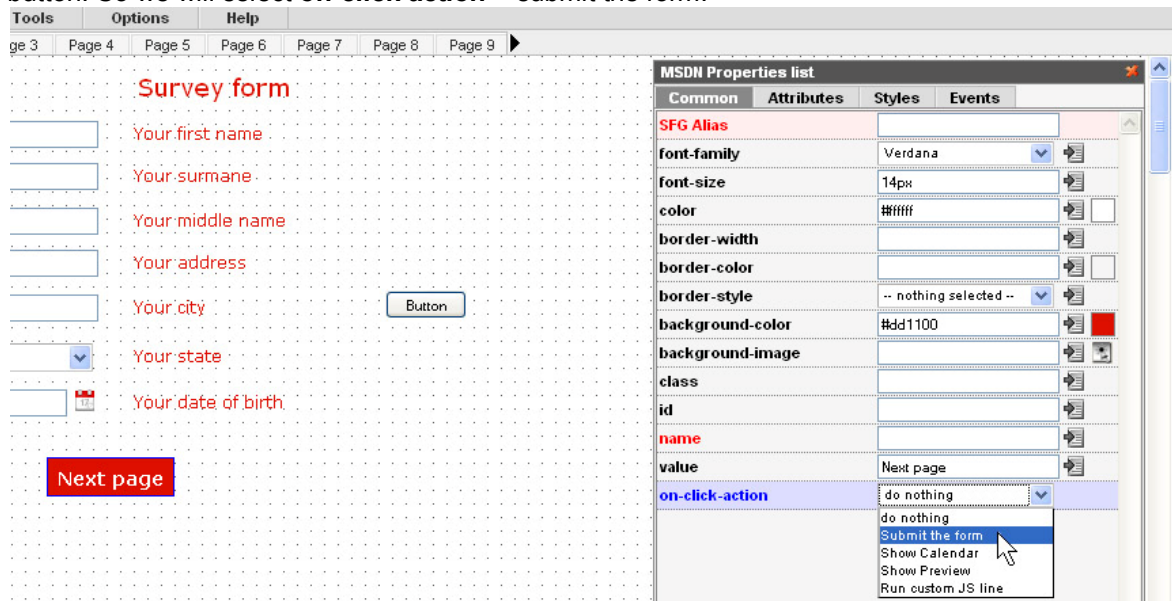
Name will be used to bind the field to the DB. If you do not give an element a name – it will not be saved. Name should contain letters and underlining only.

Required – if the checkbox is checked – the field will be mandatory

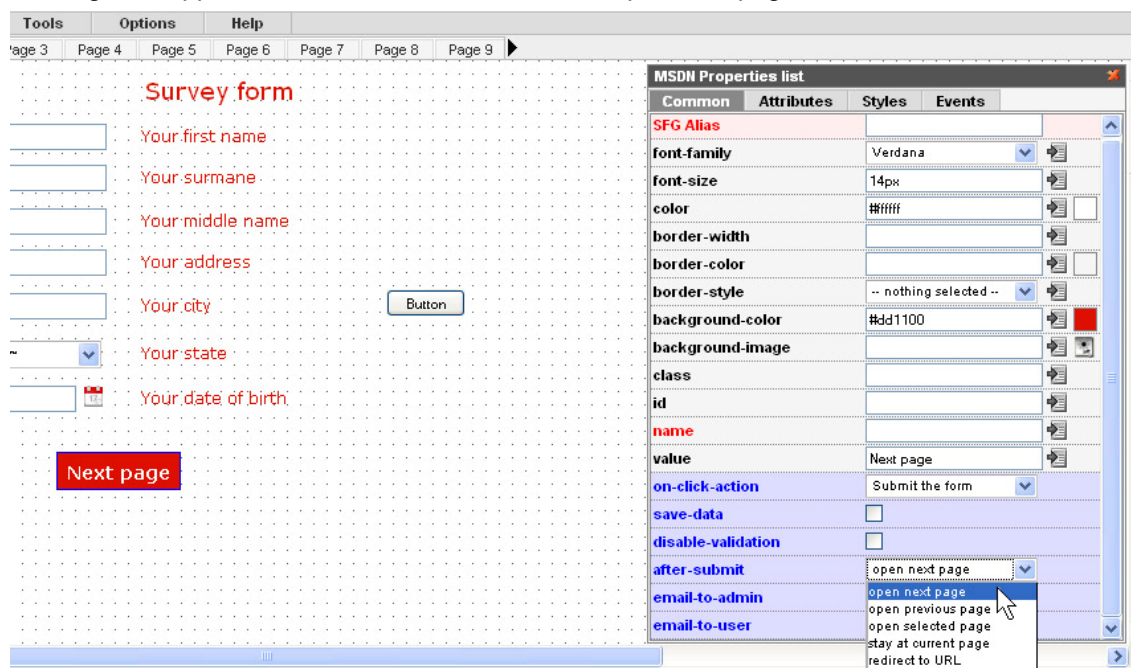
Validation – rules according to which the field will be checked. For example if you select Email validation – users should enter xxx@xxx.xxx format, otherwise they will see an error.

Add settings to the rest of input boxes.

Click the button. It also has settings. We need users to go to the next page of the form when they press the button. So we will select **on-click action** = submit the form.



New settings will appear, we will select **after-submit** = open next page



Go to **Page 2** of the form. Here we have a several radio buttons. To make them a group – so that only one of them can be selected – we should add the same **name** to them. They can have different **SmartFormer Gold Aliases** and **values**.

Select then one to another and enter the same **name** to them. Enter **Aliases** and **Values**.

Then select the button. On this page we need the form to be saved to DB and email notifications to be sent. So we select:

On-click action = Submit the form

Save data

After submit = Open next page

Email to admin

Admin email = (enter the email address of the admin)

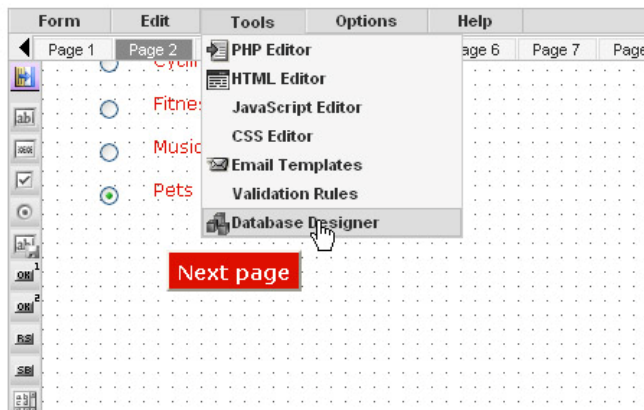
Admin email template = email to admin (2)

So our submission will be saved to DB, when this page is pressed users will see “Thank you page” (Page 3), when the form is submitted admin will receive notification email. The template for this email will be “Email to admin (2)”.

We have finished the settings.

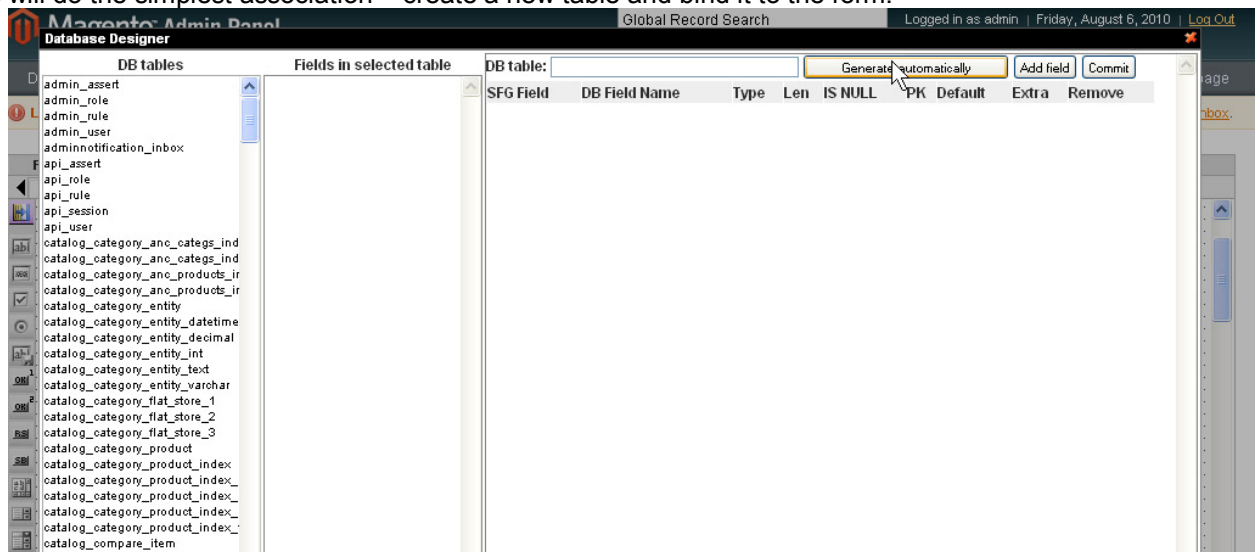
2.1.3. Associate form with DB

Now in order to save our submissions we need to bind the form to the DB. Open Database designer from the SmartFormer Gold menu (**Tools -> Database Designer**)

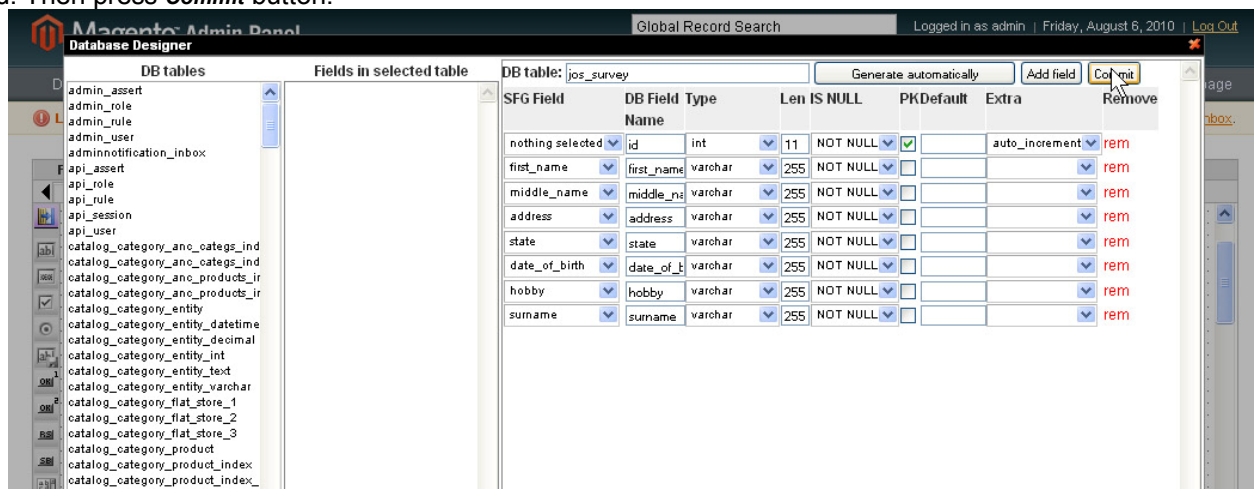


Advanced users can associate a new form with existing DB tables.

We will do the simplest association – create a new table and bind it to the form.



Press **Generate automatically** button. New table with fields will be created. Enter a name of table in **DB table** field. Then press **Commit** button.

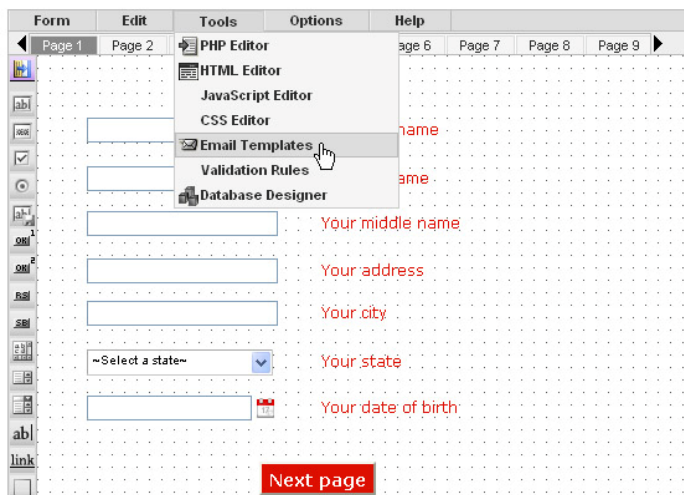


You will see the message that the changes have been applied. Now the window can be closed.

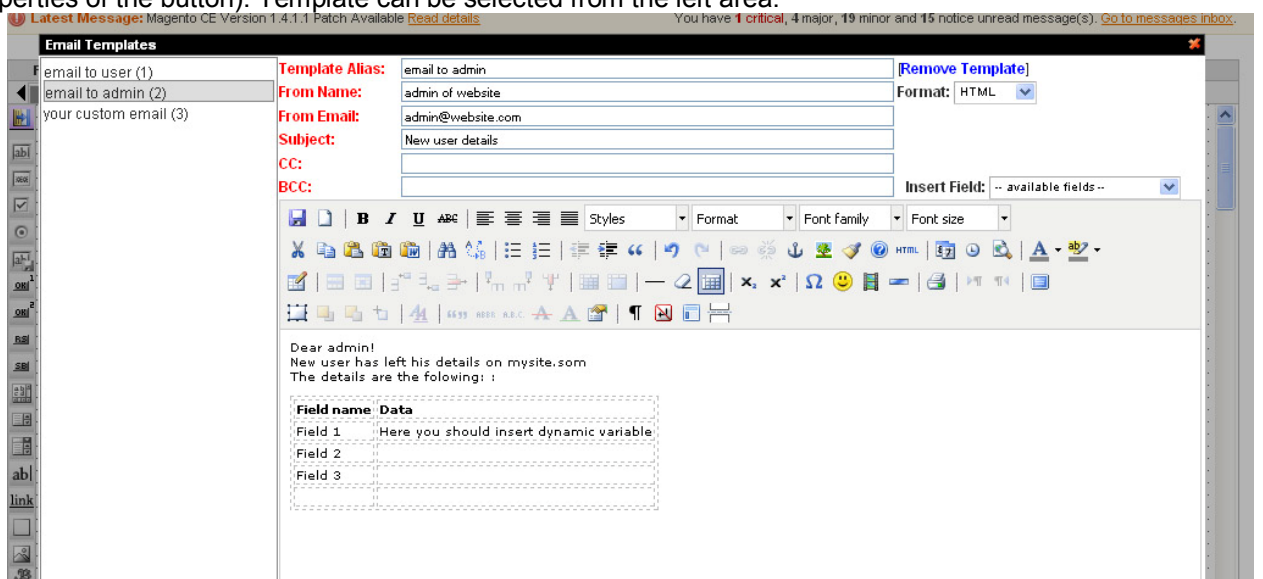


2.1.4. Create email functionality

In order for admin (and user if required) can receive email notifications – we need to create email template(s). To do it select **Email templates** from the menu (**Tools -> Email Templates**)



You will see template editor. Let us select **Email to Admin (2)** (we have selected this template in the properties of the button). Template can be selected from the left area.



From name – we will add “Administrator”
Subject – “Survey Results”

These settings are what a person will see when email is received.

Now let us delete everything in the body of the template and start anew. Add text to the template (and decorations if you wish).

Email Templates

email to user (1)
email to admin (2)
your custom email (3)

Template Alias: email to admin [Remove Template]

From Name: Administrator Format: HTML

From Email: admin@website.com

Subject: Survey Results

CC:

BCC:

Insert Field: -- available fields --

Dear administrator!

New survey results are received. They are:

First Name	
Middle Name	
Surname	
Address	
City	
State	
Date of birth	
Hobby	

Now we need to pull the information that user enters when he/she fills in the form. At the top right there is **Insert Field** drop down. It contains all fields of our form. Let us add these fields to the appropriate cells of the table.

Template Alias: email to admin [Remove Template]

From Name: Administrator Format: HTML

From Email: admin@website.com

Subject: Survey Results

CC:

BCC:

Insert Field: -- available fields --

Dear administrator!

New survey results are received. They are:

First Name	{first_name}
Middle Name	{middle_name}
Surname	{surname}
Address	{address}
City	{city}
State	{state}
Date of birth	{date_of_birth}
Hobby	{hobby}

Now when a user submits a form enters John as the first name – administrator will receive “John” instead of {first_name} in the email.

Now save the changes and then close the window.

Template Alias: email to admin [Remove Template]

From Name: Administrator **Format:** HTML

From Email: admin@website.com

Subject: Survey Results

CC:

BCC:

Insert Field: -- available fields --

Dear administrator!

New survey results are received. They are:

First Name	{first_name}
Middle Name	{middle_name}
Surname	{surname}

2.1.5. Save the form. Publish and check it

Now the form is completed. Select its properties (**Form -> Properties**). Enter **form's name** (you can also add description. It is used for admin only).

Form Name: Survey form new

Form Description:

External Access to the form:

- ☒ Site Visitors
- ☒ Registered Users

The form is connected to DB table: jos_surveyform

XML Content:

Save Form

and save the form. Then exit it.

Form **Edit** **Tools** **Options** **Help**

Save Form (Ctrl+S) Page 4 Page 5 Page 6 Page 7 Page 8

Properties

Clear Form

Exit

Survey form:

Your first name

Your surname

Your middle name

Your address

Your city

~Select a state~ Your state

Your date of birth

Next page

Now we see our new form in the list of forms. By default all new forms are **unpublished** (not available for front-end users). To make it published check the checkbox near it and press Publish button.

Form Manager

Buttons: Backup, **Publish**, Unpublish, Clone, Delete, Settings, New

#	<input type="checkbox"/>	Form Name	Description	Records	Active	Actions	Direct URL to the form
1	<input type="checkbox"/>	Survey Form		no db	Unpublished	Clone Backup	http://server.it/magento2/index.php/sfq/index/index/formid/1/
2	<input type="checkbox"/>	Payment Form		no db	Unpublished	Clone Backup	http://server.it/magento2/index.php/sfq/index/index/formid/2/
3	<input type="checkbox"/>	Registration Form		no db	Unpublished	Clone Backup	http://server.it/magento2/index.php/sfq/index/index/formid/3/
5	<input checked="" type="checkbox"/>	Survey form new		-	Unpublished	Clone Backup	http://server.it/magento2/index.php/sfq/index/index/formid/5/

Upload form: Browse... Upload

Items per page: 20

Now we can check it. Press its **Direct URL** to view it from the front-end.

Survey form

Your first name

Your surname

Your middle name

Your address

Your city

~Select a state~ Your state

Your date of birth

Next page

Fill in the form and submit it to test its functionality.

2.1.6. Manage submissions

After you submit the form – go back to admin area. Update the page. You will see that now the form has one record

Magento Admin Panel Global Record Search Logged in as admin | Friday, August 6, 2010 | [Log Out](#)

Dashboard Sales Catalog Customers Promotions Newsletter CMS Reports System [Get help for this page](#)

Latest Message: Magento CE Version 1.4.1.1 Patch Available [Read details](#) You have **1 critical**, 4 major, 19 minor and 15 notice unread message(s). [Go to messages inbox.](#)

Form Manager [Backup](#) [Publish](#) [Unpublish](#) [Clone](#) [Delete](#) [Settings](#) [New](#)

#	<input type="checkbox"/>	Form Name	Description	Records	Active	Actions	Direct URL to the form
1	<input type="checkbox"/>	Survey Form		no db	Unpublished	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/1/
2	<input type="checkbox"/>	Payment Form		no db	Unpublished	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/2/
3	<input type="checkbox"/>	Registration Form		no db	Unpublished	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/3/
5	<input type="checkbox"/>	Survey form new		1	Published	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/5/

Upload form: [Browse...](#) [Upload](#)

Items per page:

Click this number to view the submission (record). You will see all records available for this form (currently we have one record only). There will also be a filter to sort records.

Magento Admin Panel Global Record Search Logged in as admin | Friday, August 6, 2010 | [Log Out](#)

Dashboard Sales Catalog Customers Promotions Newsletter CMS Reports System [Get help for this page](#)

Latest Message: Magento CE Version 1.4.1.1 Patch Available [Read details](#) You have **1 critical**, 4 major, 19 minor and 15 notice unread message(s). [Go to messages inbox.](#)

Data List [Export All](#) [Export](#) [Delete](#) [Cancel](#)

additional filter conditions:

db column:	condition:	expression:	operator:
-- select field --	not like		and
-- select field --	not like		and
-- select field --	not like		

[Apply Filter](#) [Reset](#)

columns to display:

id
first_name
surname
middle_name
address

[Apply Filter](#) [Reset](#)

<input type="checkbox"/>	id	first_name (First name)	surname (Surname)	middle_name (Middle name)	address (Address)	city (City)	state (State)	date_of_birth (Date of Birth)	hobby (Music)	Actions
<input type="checkbox"/>	1	John	Smith	L.	Desired str., 234	Wondercity	6	12/04/1970	Cycling	View Edit Remove

Items per page:

There are records' actions. Click **View** action.

Magento Admin Panel Global Record Search Logged in as admin | Friday, August 6, 2010 | [Log Out](#)

Dashboard Sales Catalog Customers Promotions Newsletter CMS Reports System [Get help for this page](#)

Latest Message: Magento CE Version 1.4.1.1 Patch Available [Read details](#) You have **1 critical**, 4 major, 19 minor and 15 notice unread message(s). [Go to messages inbox.](#)

Preview Record [Edit](#) [Delete](#) [Cancel](#)

Field Name	Posted Value
id	1
first_name (First name)	John
surname (Surname)	Smith
middle_name (Middle name)	L.
address (Address)	Desired str., 234
city (City)	Wondercity
state (State)	6
date_of_birth (Date of Birth)	12/04/1970
hobby (Music)	Cycling

You can **edit** records, **delete** and **export** them.

2.1.7. Publish your form on website

There are several ways to publish the form. We will add our form to About Us page.

Find the page in admin area (**CMS -> Pages -> About Us -> Content**). We will delete its text and add our form.

To add the form you will need its **ID**. ID is the last number in the URL. Our form's ID is 5.

Add the following tag to the content of the page

{{block type="Itoris_SmartFormer Gold/Form" formid="5"}}

The screenshot shows the Magento Admin Panel interface. At the top, there's a navigation bar with tabs like Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, CMS (selected), Reports, and System. A message bar indicates 'Latest Message: Magento CE Version 1.4.1.1 Patch Available'. The left sidebar shows 'Page Information' with sub-tabs for Page Information, Content (selected), Design, and Meta Data. The main content area shows 'Edit Page 'About Us'' with buttons for Back, Reset, Delete Page, Save Page, and Save and Continue Edit. The 'Content' section has a 'Content Heading' field and a 'Show / Hide Editor' button. Below the editor, the HTML tag `{{block type='Itoris_Sfg/Form' formid='5'}}` is visible in the content area.

and save the changes. Now open this page from the front-end. That is where your users will submit the form from.

The screenshot shows the front-end of the Magento store. The top navigation bar includes the Magento logo, a search bar, and links for My Account, My Wishlist, My Cart, Checkout, and Log In. The main content area shows the 'About Us' page with a 'Survey form' section. The form includes input fields for 'Your first name', 'Your surname', 'Your middle name', 'Your address', 'Your city', 'Your state' (a dropdown menu), and 'Your date of birth'. A 'Next page' button is located at the bottom of the form.

3. Typical problems

I do not know how to create forms. HELP ME!

Variant 1. Read Quick Start document (it is indeed very small – plenty of images and some text). Then view the video. Or vs. They will provide you with a general idea. For special cases consult User Guide (you do not need to read it all. Check the Contents and select the topic).

Variant 2. Purchase a support ticket and ask support department.

We understand that it is not great fun to read Guides. Yet as answering the same very questions several times a day is very hard either. So we provide this option - either documentations or paid support.

I have created a form. Yet when I try to open it on my site – it says “The form you request is not available now. Please try again later”.

There can be several reasons:

1. Your trial is over and SmartFormer Gold is not activated. Its functionality is not available from both front-end and back-end then. Purchase a license and activate SmartFormer Gold with the license key.
2. Your form is not published. By defaults all new forms are unpublished. Open Form Manager (System → IToris Extensions -> SmartFormer Gold - > Form Manager), find your form in the list, check it and press Publish button. You will see Publish in “active” column of your form. Now it will be available from the front-end.

My form does not save submissions to the DB.

Check the following:

1. All your active elements (where users enter or select something) have Name attribute
2. Name attributes have only letters (English) and underlining. No spaces, no digits, no special symbols.
3. You have associated your form with the DB. To check this open Form Manager (System → IToris Extensions -> SmartFormer Gold - > Form Manager), find your form and check what it has in Records column. If it has ‘no db’ – your form has no DB table. If it has a number or “-” – it is associated with the DB. [Read how to bind a form to DB.](#)
4. Your button that submits the form (last one) has save-data checkbox checked.

If only some of the fields are not saved and you have checked their name attributes – perhaps you have added them after you created DB association. In this case you will need to either re-generate the DB (this will delete all previous records) or to add them manually in Database Designer. For more details check User Guide.

My form does not send emails.

Check the following:

1. Your button that submits the form (last one) has email-to admin and/or email-to-user checkbox checked.
2. In admin-email field the correct email of the administrator is entered (if you need emails to administrator). Admin-email-template field is selected.
3. User-email-addr-field is selected. You should have Email field on the form, select this field here. User-email-template field is selected.

If everything is set correctly there – make sure that your website sends emails at all. To do it create a new customer from admin area, enter your email address and check if you receive email notification or not.