

Smart Former Gold for Magento

User Guide

version 1.0

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1. Introduction

1.1. Legend



Important notices



Example



For advanced users

1.2. Purpose

SmartFormer Gold for Magento is the means to create forms. It has been developed as a professional extension, so it can be used not only to create simple forms but also as an instrument for developers to create complex form applications.

Following the modern tendencies **SmartFormer Gold** is a drag-and-drop instrument. When you create forms you can simply drag elements to the working area and adjust them. Hot keys, special menu to access tools and editors – convenient features of desktop applications are available in the web extension.

SmartFormer Gold has inner email notifications. You can create custom emails having decorations, texts and data submitted by users who fill in the form. These emails will be automatically sent to users and administrators depending on your settings.

SmartFormer Gold allows saving submissions in DB, so administrators will be able to manage them from the back-end of the website.

There is ability to export submissions.

There are special tools for you to create form easily. The working area has a grid so that the elements are adjusted in a convenient way. The cells of the grid can be re-sized. Grid can be switched off as well. There is also “stick effect” – when several elements are added and you will need a new one – you will see special lines that appear between elements in horizontal and vertical surfaces – so that you adjust elements exactly. There is ability to use hot keys, to manage a group of elements together.

1.3. System Requirements

SmartFormer Gold is provided for Magento 1.4. So that to guarantee the correct work of the component, special technical requirements should be met. They are:

- Magento 1.4.x or higher Community Edition
- MySQL DB 4.1.x or higher
- PHP 4.3.x or higher
- GD library 1.8 (+True Type & Free Type) library or later

1.4. Supported Browsers

- Mozilla Firefox (recommended) v2.0 or higher
- Internet Explorer v7.0 or higher
- Google Chrome 1.0 or higher
- Opera 9.5 or higher
- Safari 3.0 or higher

1.5. License. What it includes. How to switch license

One license of **SmartFormer Gold** includes installation on one domain. It also includes life-time free updates of the extension.

SmartFormer Gold is domain-dependent, so it can be installed on one domain only. This includes localhosts, sub-domains, parked domains, etc. So two different domain names are treated as two different domains.

When a website is developed – usually it is created on a localhost. When it is ready it is uploaded to live website.

If your localhost has the same name as future live site's domain – you will not need to switch the license of SmartFormer Gold. If it is not – you will need to switch the license off from a localhost and activate SmartFormer Gold on your live site.

To do it please login to <http://www.itoris.com> (you will receive login details together with the license key after the purchase) and go to **My Downloads**. Reset your license key from the current domain name. Then use it anew to activate a new domain.

You can reset license key as many times as you need.

2. Installation and Update

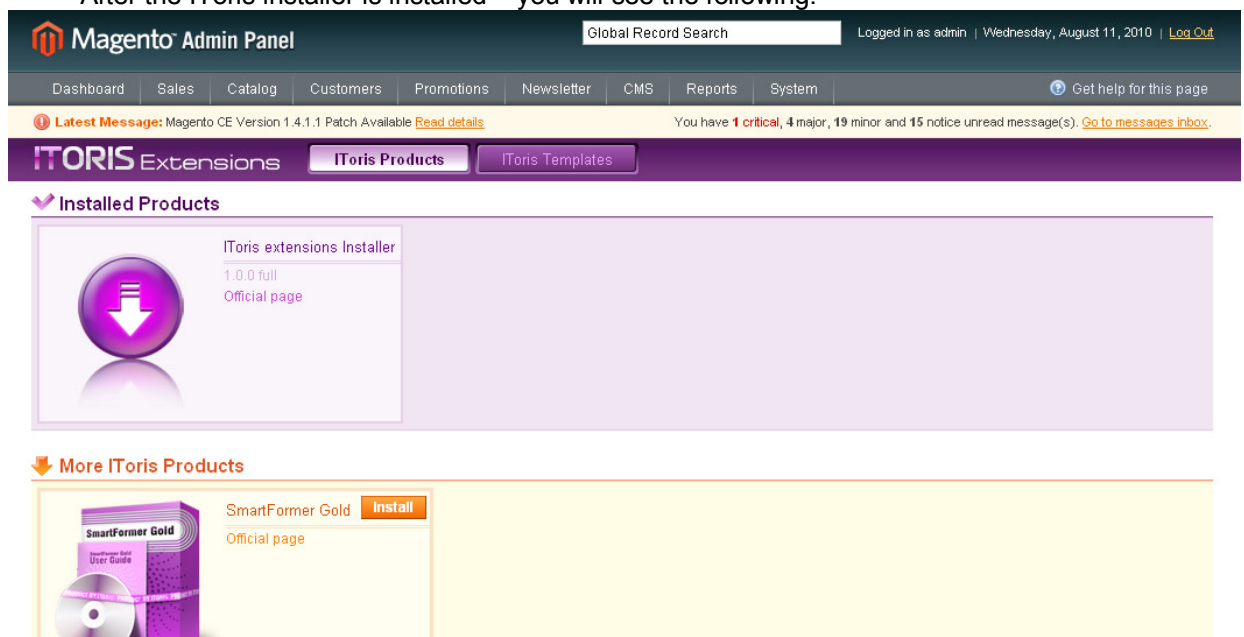
2.1. Installation. Update

We recommend installation of our extensions and design themes via **IToris Installer**. It is fast and easy.

Installer contains all available IToris extensions (products) and design themes (templates). It also shows if the new versions are available and allows updating the versions with one click directly from there.

Download the installer from <http://www.itoris.com/itoris-magento-installer.html> and unpack it to the root of your website. Go to admin area and select it from menu (**System → IToris extensions → IToris Installer**).

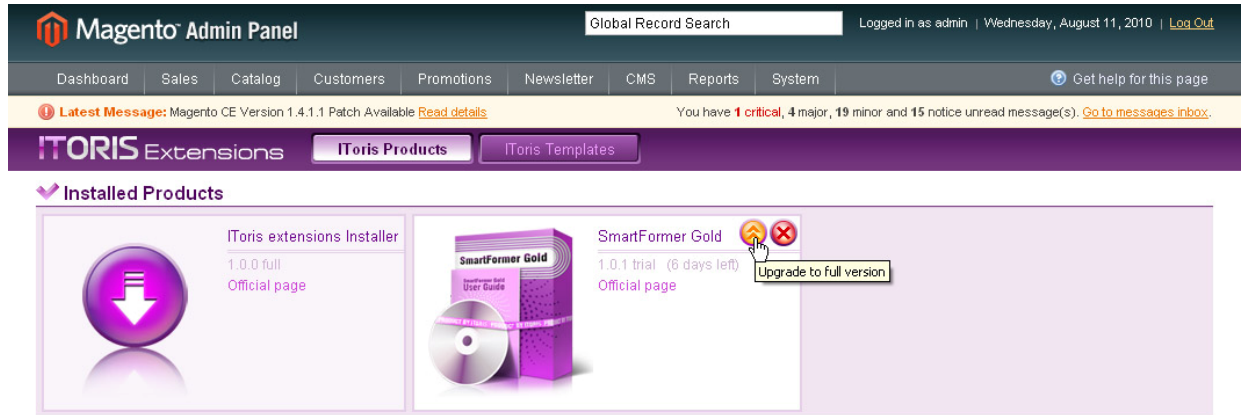
After the IToris installer is installed – you will see the following:



Find **SmartFormer Gold** in the list and press **Install** button. It will initiate installation.

You can install the 7-day trial and activate it later on when you purchase a license. Or you can install the full version (you will need to enter license serial key then). Once the installation is started do not discontinue it.

When the installation of the trial is finished – you will see SmartFormer Gold among the list of available extensions.



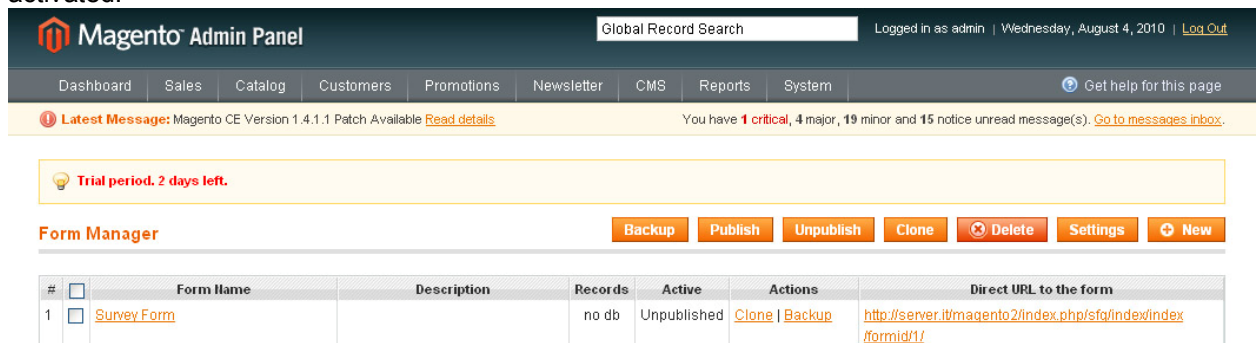
You can upgrade to full version from there as well as update to the latest version or uninstall.

IToris Installer can be downloaded from <http://www.itoris.com/itoris-magento-installer.html>

2.2. Trial. Activation

SmartFormer Gold has a 7-day trial. The trial has no limitations in functionality, so you can check all features available. All your work created during the trial period will be saved when you activate SmartFormer Gold.

During the trial period when you open SmartFormer Gold from the back-end – you will see a warning message “Trial period. X days left”. The message will disappear when the extension is activated.



To activate the extension you will need to purchase a license key. It can be purchased from <http://www.itoris.com/magento-form-builder-smartformer-gold.html>. After the purchase is approved by payment system you will receive email with the license key.

Open IToris Installer, find SmartFormer Gold. Press “Upgrade to full version” icon and enter your license there. Your SmartFormer Gold extension will be activated.

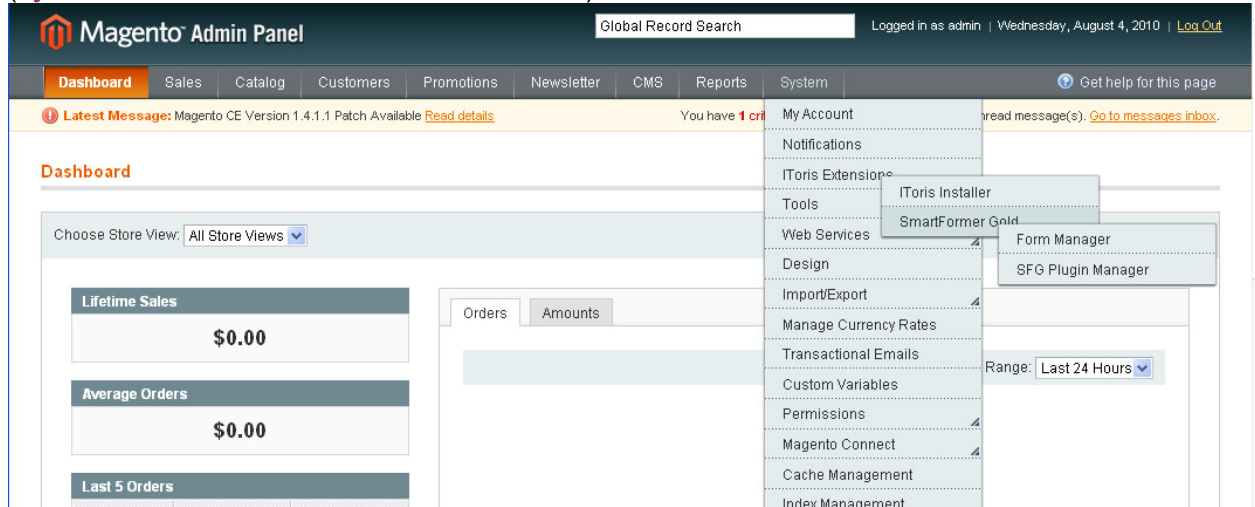
i When you install SmartFormer Gold on a localhost – your localhost should have a unique name. Ideally the names of localhost and live site should coincide.

If the name is not unique, especially if it is used commonly (e.g. mysite, site.com, etc.) SmartFormer Gold will treat all these localhosts as being the same domain. So if somebody has used the same name already – you will install the trial and will see the error that the trial is over already.

3. Start and Settings

3.1. Start of work with SmartFormer Gold

When you open the back-end of the site installed **SmartFormer Gold** will be available from menu (**System -> IToris Extensions -> SmartFormer Gold**)



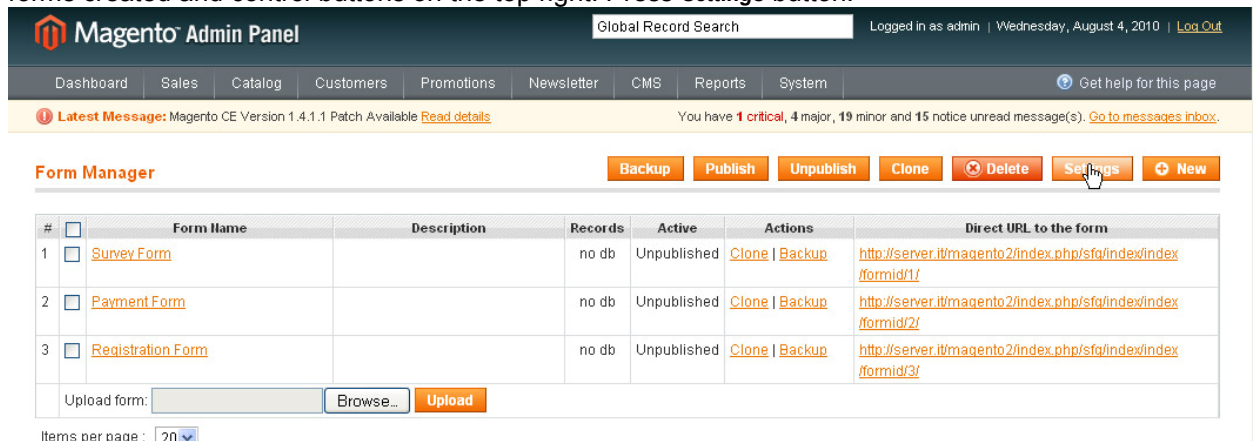
There are two sub-menus:

Form Manager – main area. All your forms will be available here. New forms are created from this area as well. You will gain access to submissions of your forms, email templates, settings from this area as well.

SmartFormer Gold Plugin Manager – this area is for special plug-ins that are created for **SmartFormer Gold**. Plugins expand the functionality of the extension yet not all clients will need them, so their installation is optional. Plugins can be purchased/downloaded from our official website and uploaded (installed) directly from this area.

3.2. Main settings

Select **System -> IToris Extensions -> SmartFormer Gold -> Form Manager**. You will see a list of forms created and control buttons on the top right. Press **Settings** button.



Here go the general settings of SmartFormer Gold. You can select administrators who will have access to the extension from the back-end.

The following settings are available:

- CSV export options
- Admins who have access to the component

- Language settings

CSV export options – settings for export to .csv

Admins who have access to the component – all active administrators will be available. Only selected administrators will be able to manage forms

Lingual Settings – language for SmartFormer Gold's back-end can be selected

When settings are selected – press either **Apply** (changes will be saved, administrator will stay on the same page) or **Save** (changes will be saved, administrator will be directed to the Form Manager) button.

4. SmartFormer Gold's Interface

4.1. Form Manager. Buttons

On the top of the page you will have a number of buttons to manage your forms. If you need an action to be applied to several forms, please select them (by checking the checkboxes near them) and press a button.

- **Backup** button – you can backup your forms to transfer them to another site. Backup is also useful when you re-install the component or transfer the site.

- **Publish/Unpublish** buttons – please use them to activate/deactivate your forms. Active forms are visible on the front-end. Select the forms that need the action by checking the checkboxes near

them. Then press the button

- **Clone** button – if you need to create a form similar to the existing one, you can clone the existing form and edit its copy.
- **Delete** button – deletes the selected form(s)
- **Settings** button – general settings of SmartFormer Gold (see 3.2.)
- **New** button – press it to create a new form.

4.2. Form Manager. List of Forms

The list of forms contains the following:

The screenshot shows the Magento Admin Panel Form Manager. The top navigation bar includes links for Dashboard, Sales, Catalog, Customers, Promotions, Newsletter, CMS, Reports, and System. The sidebar on the left contains a search bar and a list of messages. The main content area displays a table of forms with the following columns: #, Form Name, Description, Records, Active, Actions, and Direct URL to the form. The table contains three rows of data: Survey Form, Payment Form, and Registration Form. The interface also includes a top navigation bar with buttons for Backup, Publish, Unpublish, Clone, Delete, Settings, and New. The bottom status bar shows the number of items per page (20) and a total of 10 items.

1 # of form. This number defines the order of form creation. Forms created earlier will go higher.

2 Bulk management. Each form has a checkbox. There is a top checkbox as well that checks all forms together. Several forms can be selected, then you press a button and the action is applied to all selected forms together.

3 Form name. Title of the form you enter (used to inner purposes). It is a link clicking which you open the form up for editing.

4 Description. Description of forms is used in the back-end only for inner purposes.

5 Records. This column shows 1. if the form has bound to DB or not. 2. If the form has been submitted or not, and how many times.

Status

Form is not bound to the DB
 Form is bound to the DB but has not been submitted yet
 Form is bound to the DB and has submissions

What is displayed

no db
 -
 6*

* - number of records (how many times the form has been submitted). This number is a link clicking which you will see the list of submissions of this form.

6 Active. If the form is active or not. Only active forms are available from the front-end.

7 Actions. There are two default actions – Clone (creates a copy of the form) and Backup (creates a backup of the form to be saved locally)

8 Direct URL to the form. You can test the form without settling it on the site – make it active and press direct URL. Direct URL also shows the actual ID of the form (the number at the end).

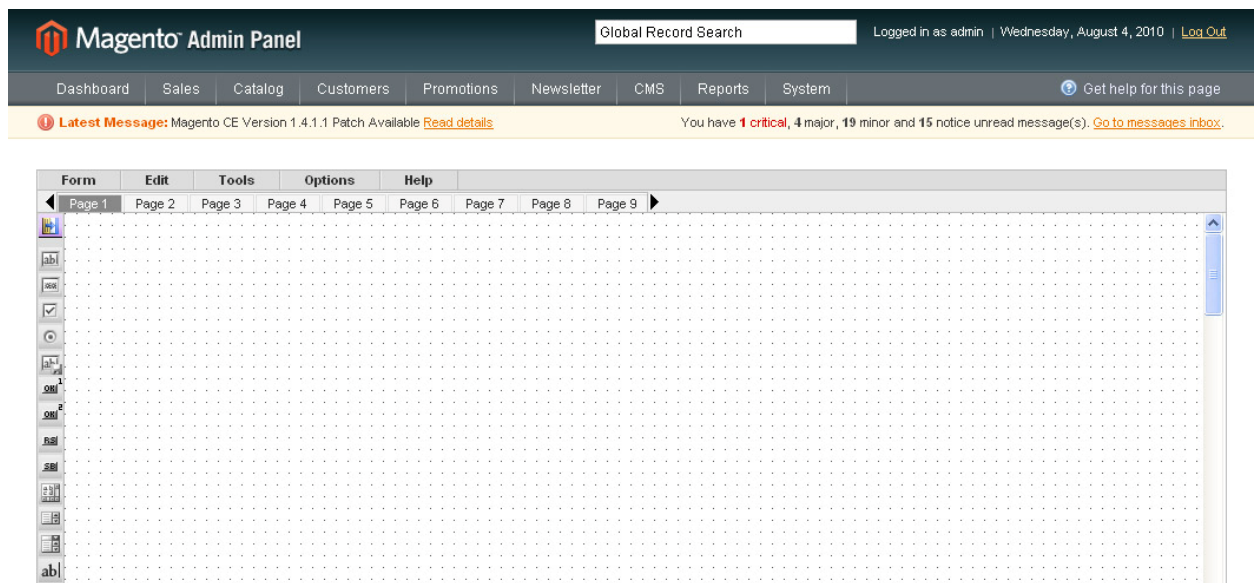
9 **Form Upload.** You can upload a backup of the form saved locally.

10 **Items per page.** You can select how many forms there should be displayed per page if there are plenty of forms.

4.3. Form Manager. Working Area



4.3.1. General description of Working area

When you open Smart Former Gold and press **New** button to create a new form, there is the main working area for creation the forms.



The area with cells will be used to drag elements to it. It can be enlarged by adding elements closer to the borders (will be stretched wider and longer).

Above the area there go the pages of the form. If you need a one-page form, please create it on Page 1 (selected by defaults). If you need a multi-page form, please add the elements to Page 1, then switch to Page 2 and continue adding the elements.

There are 10 pages available by defaults (you can leaf them through using  and  arrows. To add more pages please leaf till the end of the area and click **add new** button. By clicking it you may add as many pages as you need.

All elements available to create the forms go on the left of the main working area. When the mouse is over the element, its name will be shown as the hint. To add an element please put the mouse over it, press the left button and, holding it, drag the selected element to the working area.

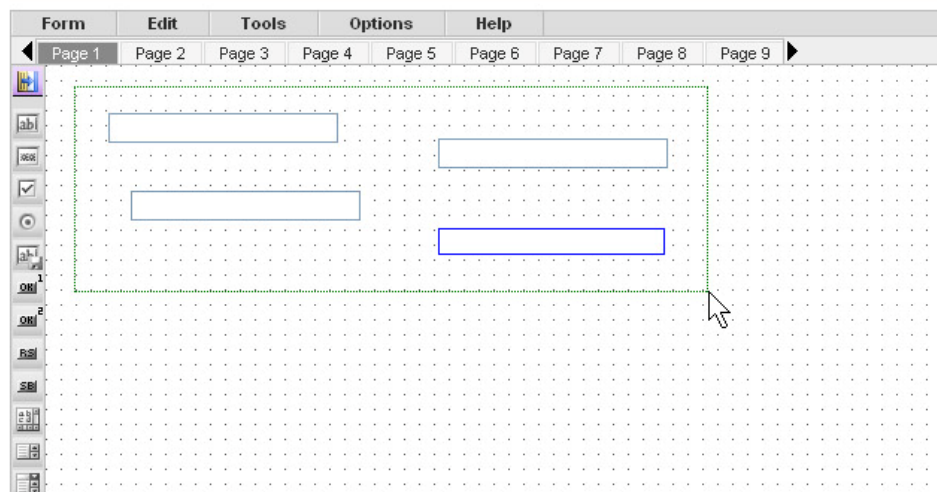
4.3.2. HTML Elements



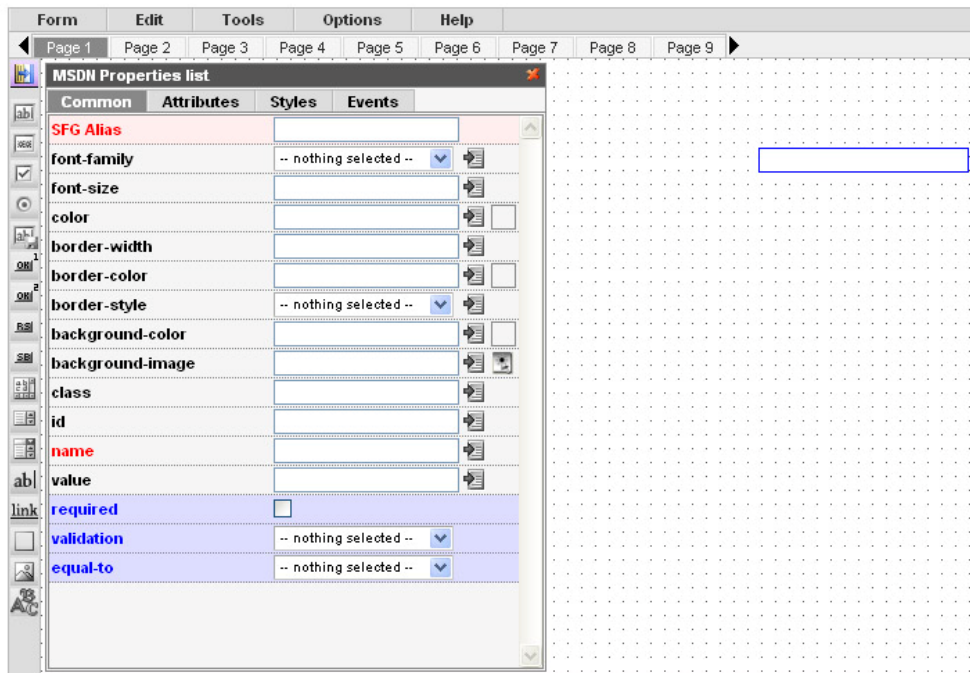
Select the element you need and drag it on the working area. To move the element select it and drag to the new place.

To delete the element select it and press **Delete** button on your keyboard.

You can also move/delete the group of elements together. To do it please select the elements by drawing the border round them with your mouse and apply an action to them together (move, delete).



Each element has properties. When the element is active (after you dropped it or when you click on it) – the box with properties appears.



The properties depend on the element. Some of them are special ones and should be used by advanced users only, while the rest can easily be used to modify your elements on the form. The most important properties, that are available for each element, are **SmartFormer Gold Alias** and **Name** (they are **red** to attract attention). Please add them to all your active elements of the form.

SmartFormer Gold Alias is the title of your element that you will see in admin area when you view the submitted forms. It will also be displayed in e-mail templates. Please add some clear name here. Your name can contain several words, numbers, underlining and special characters.

Name is used to bind the element to the database. When user enters some data to the element (field), the data should be added to the database in most cases, so that you can see it in admin area. That is why it is crucial to add Names to your elements. Please add one work (underlining can be used), alphanumeric only.

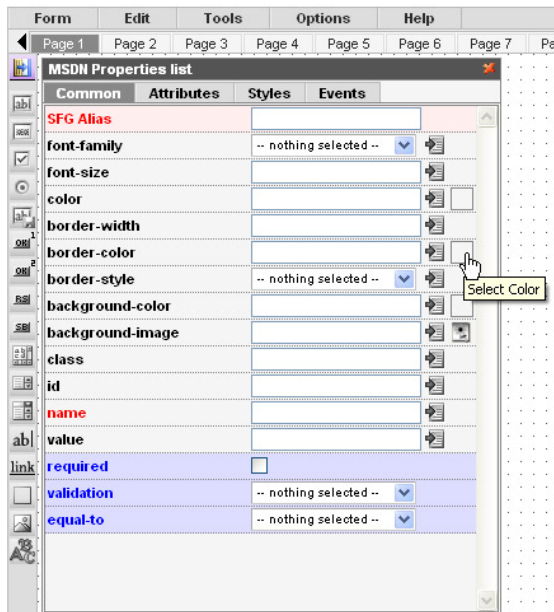
Elements' properties are divided into 4 tabs:

- Common
- Attributes
- Styles
- Events

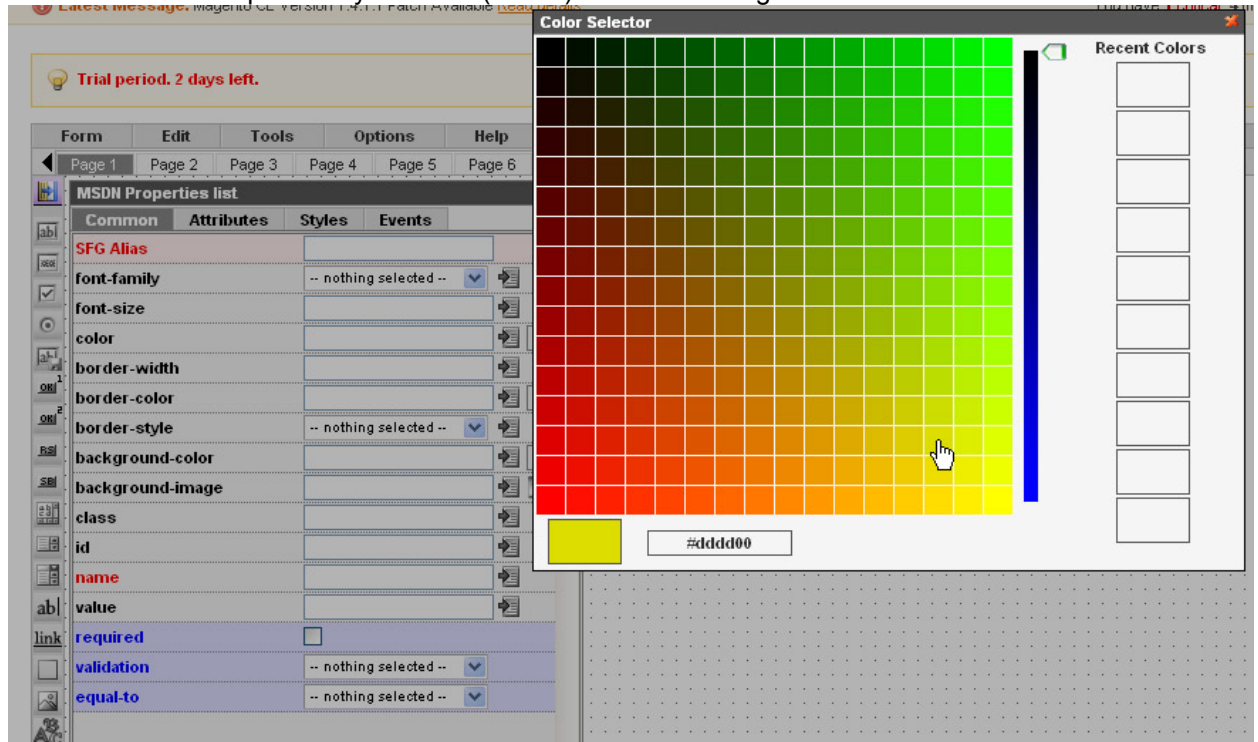
4.3.3. Common Properties of HTML Elements

SmartFormer Gold Alias – will be used in reports and email templates. Please always add this property to see the data, entered by your users, in correct format.

Font settings – three settings are used to set the font – **Font family** (font type), **Font size**, **Color**. To set the color please click the square near the property.



You will see the large Color Selector, where you can either choose the color or set its number. It will also contain the previously selected (recent) colors on the right.





- **Border settings** – include **Border width**, **Border color** and **Border style** (solid border, dotted border, etc.). The logic of color selection is the same as with the fonts' colors.
- **Background settings** – include **Background color** and **Background image**. All images loaded to it will be available for selection. To select please click the icon near the property:

You will see the list of available images: By clicking on any of them you will select it.

- **Class** – used for setting the CSS class
- **ID** – the id will be used in JS code's insertions.
- **Name** – will be used for DB correlations. Please add it if you need the element to be saved in DB.
- **Value** – if you add some text here – it will be displayed as the default text.
- **Required** – if the element is required or not

- **Validation** – checks the type of information entered (e.g. if the selected validation is email, it should be of xxx@xxx.xxx format)
- **Equal-to** – used when you create elements like “re-type your...”. Please select the original element that the current element should be equal to.
- **Dir** – the direction of text (left to right or right to left)
- **Disabled** – the element can not be edited
- **Maxlength** – maximum quantity of symbols for entering
- **Title** – will be displayed as a hint when mouse is over the element

 If you select an element and see no window with the properties – check the checkbox in menu Options -> Show Properties

 This User Guide does not describe all attributes, styles and events of the elements. For more information please check HTML guides, e.g. [MSDN](#).


4.3.4. Check Box

There can be a single check box, and there can also be a group of check boxes.

If you have a group, and want it to be treated as a group (so that only one checkbox can be checked out of several ones.) please add the same **Name** attribute to all your check boxes. The name should contain [] at the end.

 hobbygroup[]

4.3.5. Button (type 1)

 Please try to use this button in the majority of cases. The rest of buttons have very special usage, so unwarranted usage of them can cause problems of forms' correct working.

Here is the list of properties available for the button. The same properties will be available for image (in case image is used as button) and link element:

On click action – what should be done if the button is clicked. The first-level options are the following (depending on the selection the new sub-options will be available):

- **Do nothing**
- **Submit the form**
 - **Save data** (if you want entered data to be saved in DB)
 - **After submit** (what should be done after the form is submitted)
 - ✓ Open next page
 - ✓ Open previous page
 - ✓ Open selected page
 - ✓ Stay at current page
 - ✓ Redirect to URL
 - **Email to admin** (should the results be emailed to admin)
 - ✓ **admin-email** (enter the email address(es) here. Several addresses should be comma-separated)
 - ✓ **admin-email-template** (select the template of the emails)
 - **Email to user** (should the results be emailed to the user)
 - ✓ **user-email-addr-field** (select the field in which the users will add email address)
 - ✓ **user-email-template** (select the template of the emails)
- **Show calendar**
 - **Date input field**
 - **Date format**
 - ✓ mm/dd/y

- ✓ mm/dd/yy
- ✓ dd/mm/y
- ✓ dd/mm/yy
- ✓ y-mm-dd
- **Show preview**
- **Run custom JS line**
 - **Custom JS line** (enter the line here)

4.3.6.Button (type 2)


This button has a different default style. The rest of attributes of this type of button are the same as with the previous button element.


4.3.7.Reset Button

Use it if you need the entered data on the form to be cleared without the page's overloading.

4.3.8.Submit Button

Use it if you need the entered data on the form to be submitted.

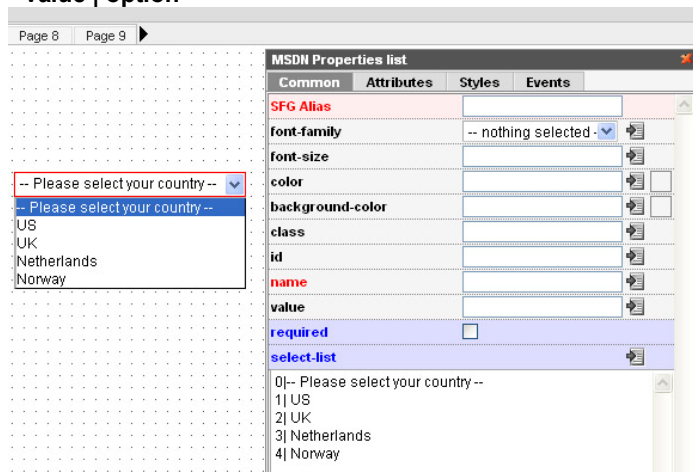
 This button will submit the form without validation. If you need the validation to work – please use Button (type 1) or Button (type 2).

 Reset and Submit buttons are special cases of a normal button, containing only the attributes that can be applied to these buttons only. Any regular button can be used as reset button or submit button depending on the attributes and properties.

4.3.9.Select Box

Please add the options for your select box in the following format:

* value | option



The screenshot shows a web form editor interface. On the left, there is a grid of form elements. One element is a select box with the text "-- Please select your country --" and a dropdown arrow. Below it, the options are listed: US, UK, Netherlands, and Norway. On the right, there is a "MSDN Properties list" panel with tabs for Common, Attributes, Styles, and Events. The "Attributes" tab is selected, showing various attributes like font-family, font-size, color, background-color, class, id, name, value, required, and select-list. The "select-list" attribute is expanded, showing a list of options: 0|-- Please select your country --, 1| US, 2| UK, 3| Netherlands, and 4| Norway.



0 | == Please select ==
 1 | US
 2 | UK
 3 | Italia
 4 | Sweden
 5 | Spain

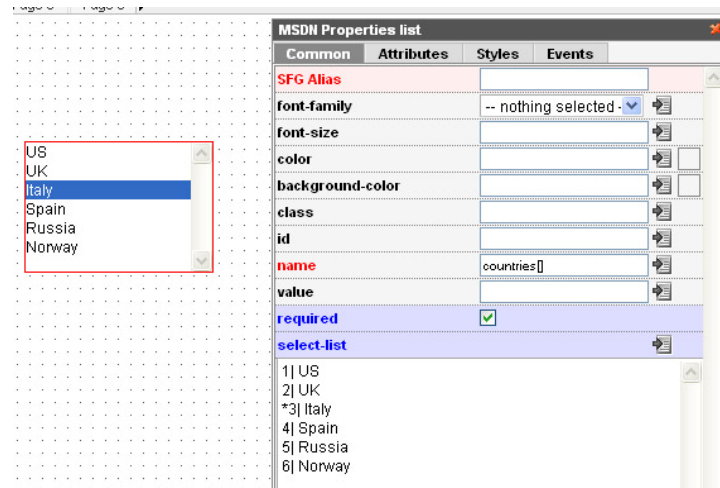
“0” will NOT be participated in selection. If you set ‘Required’ check box, the item having

0 value can not be selected (so you can add any attraction phrase like “please select” here”).

“* “ will be used for the default item to be displayed.

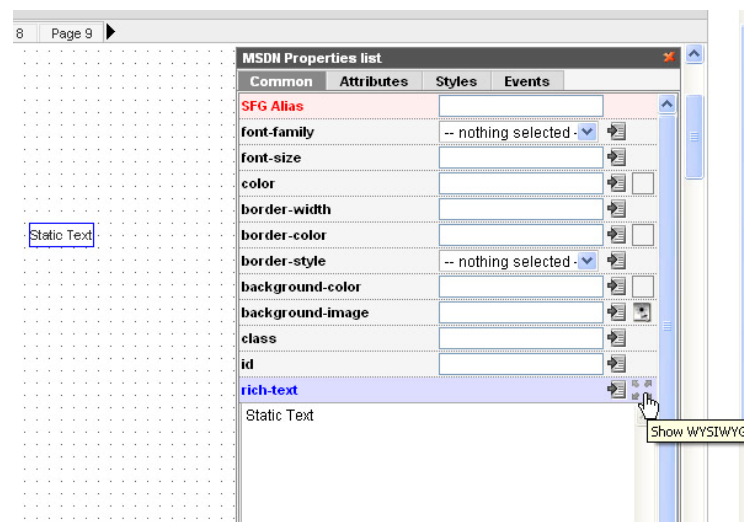
4.3.10. List Box

The same logic of options is used here as with the Select box. List box allows multiple selections. In case you need the ability to select several items – please enter the following in the **Name** field of the List box – **fieldname[]**

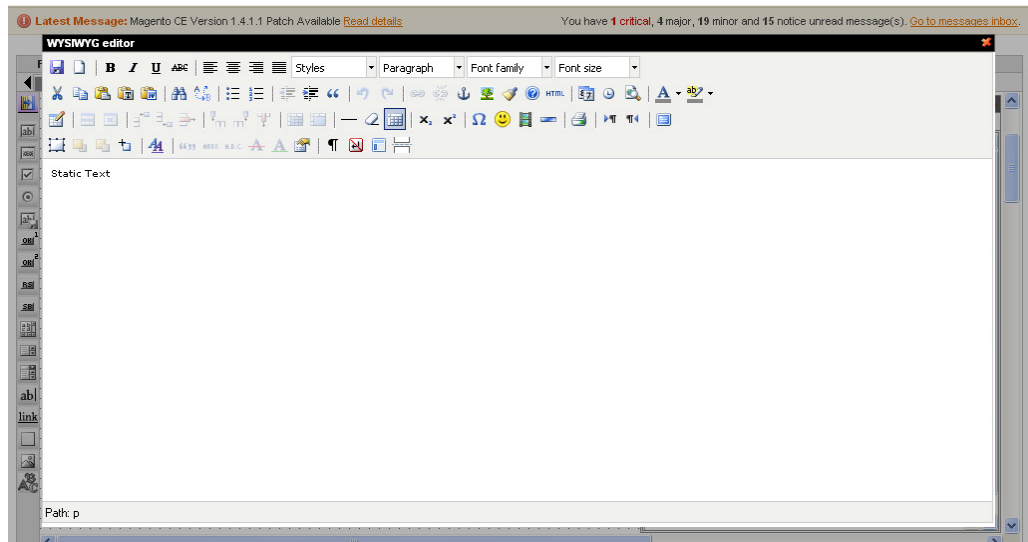


4.3.11. Static Text

WYSIWYG can be used for text creation here. To open the WYSIWYG editor please click the icon in Static Text properties:



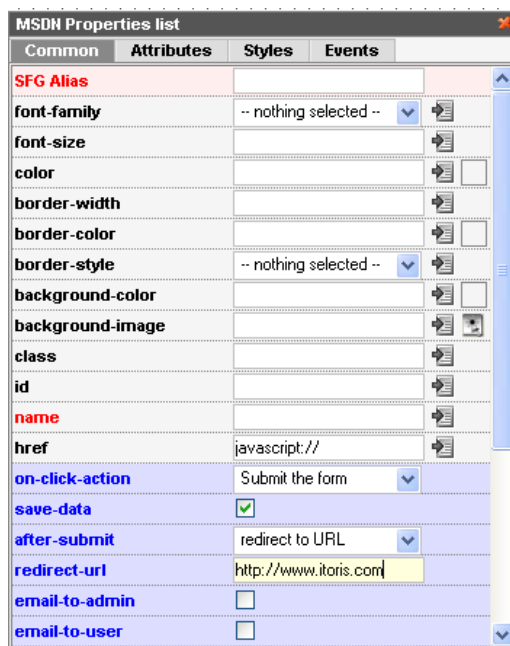
You will see the WYSIWYG editor where you can manage Static Text:



4.3.12. Link

Link element has the same on-click actions as Button element has.

If the on-click action is set – it will behave like a regular link. If the on-click action is set – please add `javascript://` to its **href** field.



Here you can also use WYSIWYG (like with Static text).

4.3.13. DIV element

Div element can be used the way you use `<div>` tag in your HTML code. Please add custom HTML code to the element. Div can also be created via WYSIWYG means (same as Static text).

4.3.14. Image

Image can be used as a simple picture (e.g. you want to add a beautiful background to your form, or add a photo, etc.). It can also be used as a button or link (clicking on it will direct users to other pages or open up other websites).

4.3.15. CAPTCHA Image

The following elements are available for CAPTCHA:

CAPTCHA type – please select one of the three types available. They differ with the images displayed

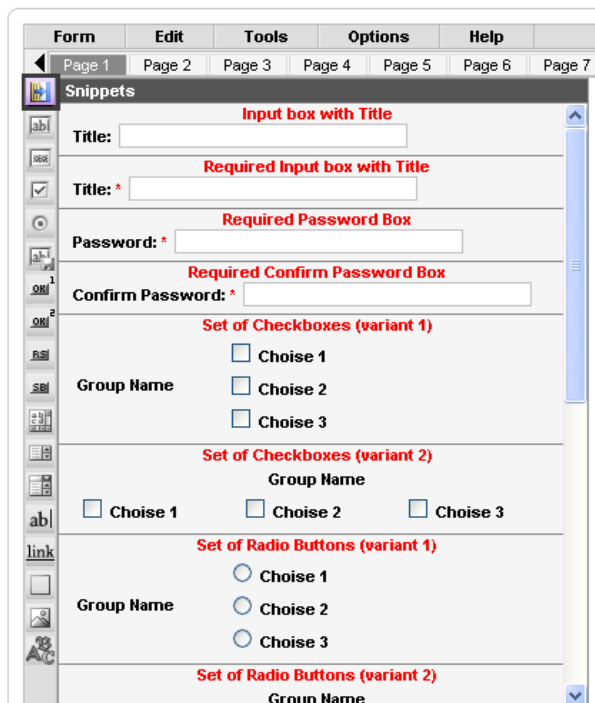
CAPTCHA length – please select the quantity of symbols in your CAPTCHA

CAPTCHA symbols – please enter the allowed symbols for CAPTCHA (you can avoid some confusing ones, e.g. 0 and O, etc.)

CAPTCHA field – please select an edit box in which the users will enter the symbols from

4.3.16. Snippets

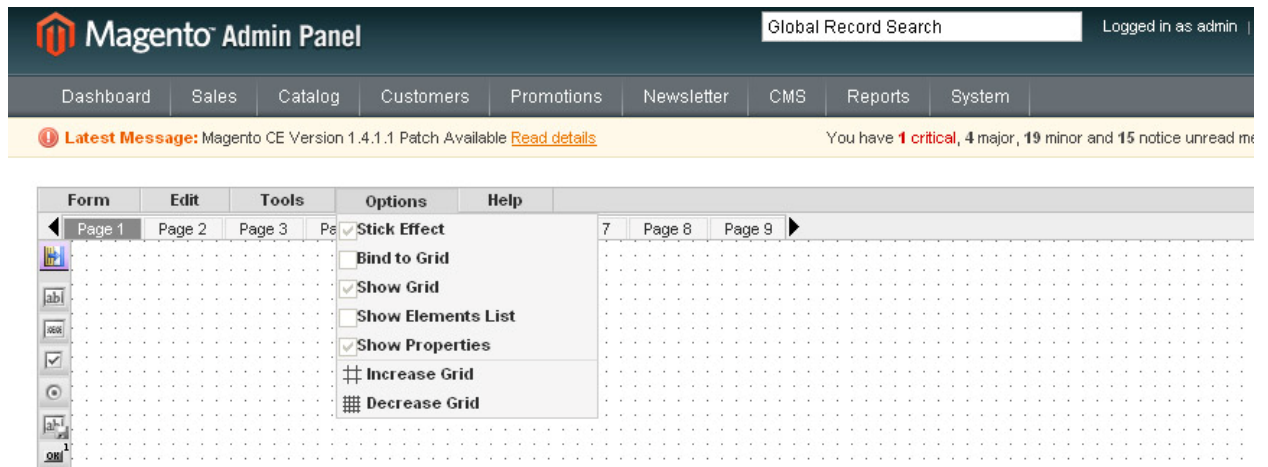
There are groups of elements that are usually used together. You can add these elements one by one, or can select the group in the Snippets. Please click the Snippets icon at the top of the HTML Elements' list to see the available snippets.



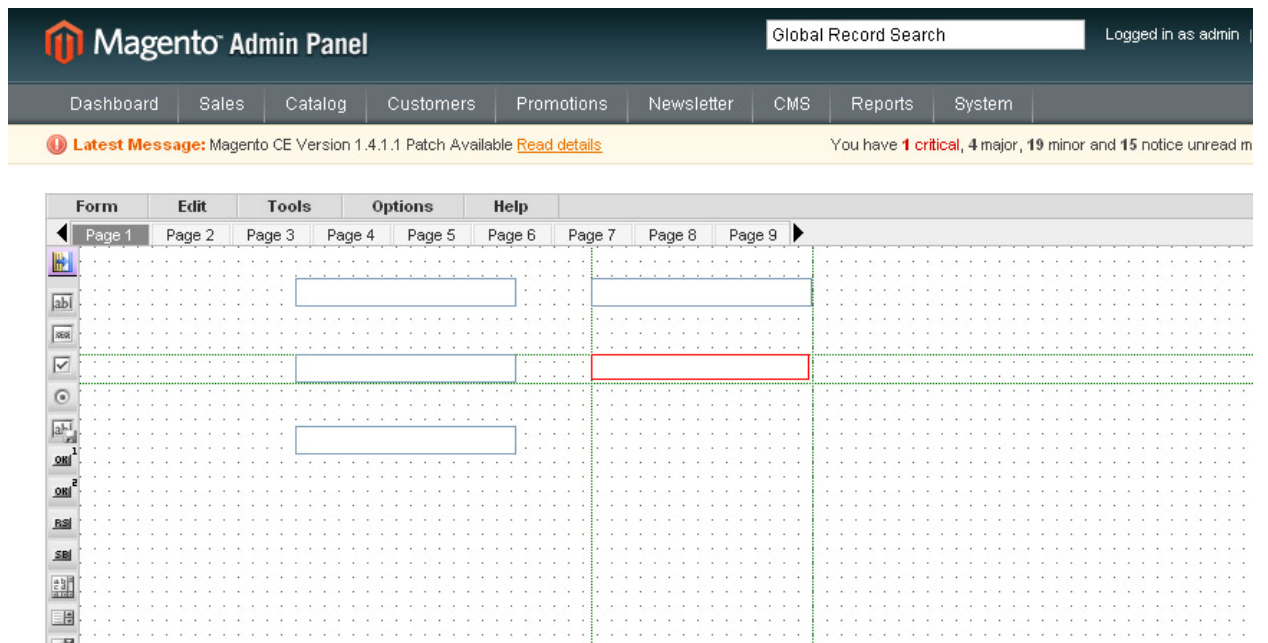
Snippets are added to the form the same way as the rest of elements (drag and drop). You can change the properties of any element in the snippet.

4.3.17. Options of the working area

To make the work with the form convenient, you can select the options for working area. The options can be managed from Options menu of Smart Former Gold. The following options are available:



Stick Effect – the following elements that you add to your form, will “stick” to the previous ones, so that to help you aligning them. You will see the vertical and horizontal lines between the previous elements and the new one.



You can switch the effect on and off from the Options menu.

Bind to Grid – if you activate this effect, you will move your elements vertically and horizontally cell by cell (each movement is one cell).

Show Grid – displays or takes away cells

Show Elements List – displays the list of all elements that are currently available on the form

Show Properties – displays the properties of the selected element

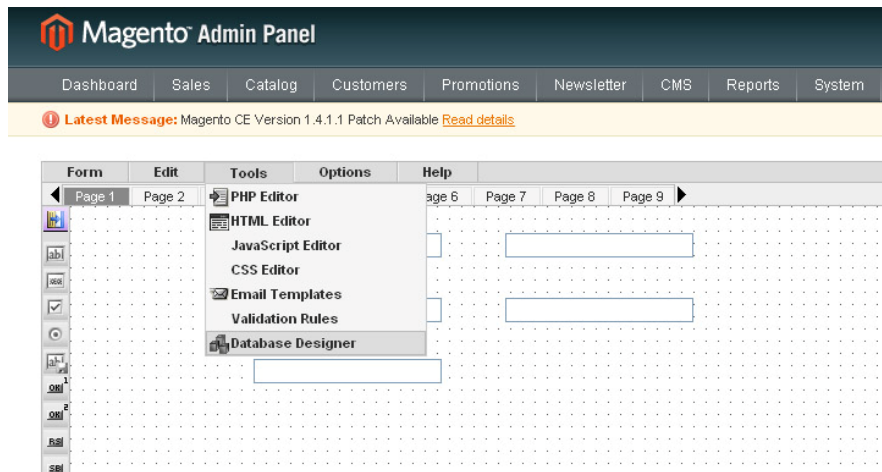
Increase Grid/Decrease Grid – makes the cells larger or smaller.

4.4. DataBase

SmartFormer Gold provides direct access to the DB. When you create a new form – it should be associated with a DB if you want submissions from it to be saved.

To open DataBase Designer select it from SmartFormer Gold menu (**Tools -> Database Designer**)

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



If your form transmits data to some other place (a payment gateway), or works with the existing data, that does not need saving (Login form) – you do not need to create a new database table for it.

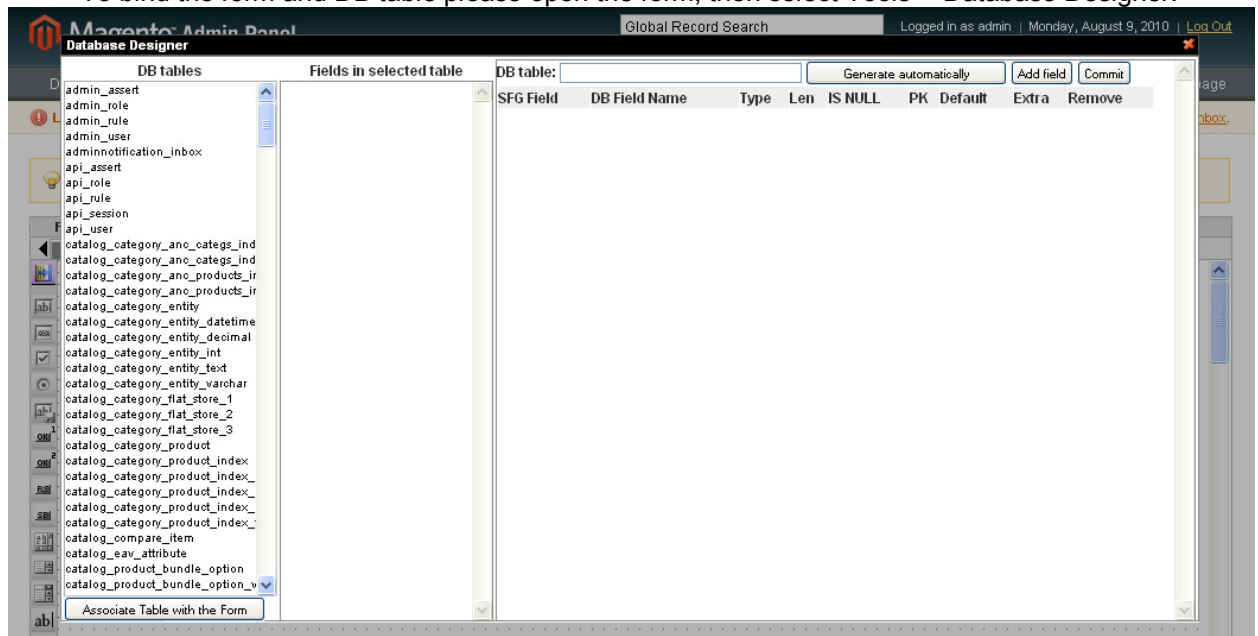
If the data that users enter in your form should be saved, you need to create a new database table, where this data will be kept, and bind the table to your form.

Your submit button should have “save-data” option enabled. Please click the button and check the “save-data” checkbox.

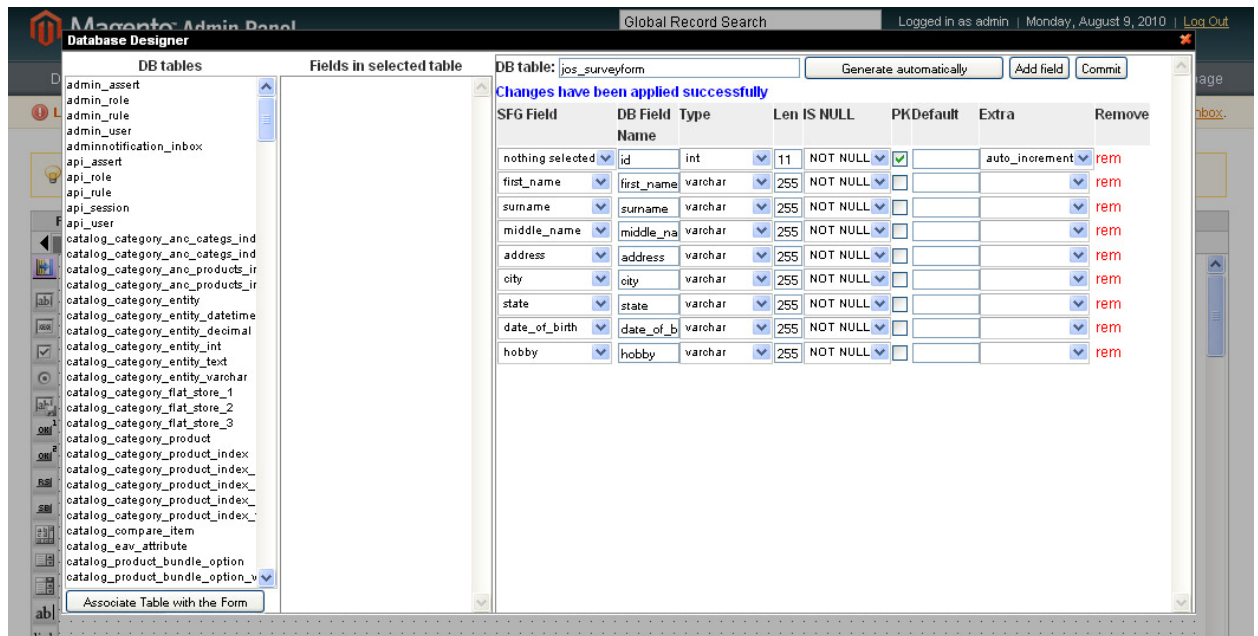
4.4.1. Create a new DB table and bind your form to it

Please bind the form to DB only when the form is ready.

To bind the form and DB table please open the form, then select Tools ->Database Designer.



Press **Generate Automatically** button, then enter the name of your new DB table and press **Commit** button. You will see the table structure and message “Changes have been applied successfully”. After that the designer can be closed.



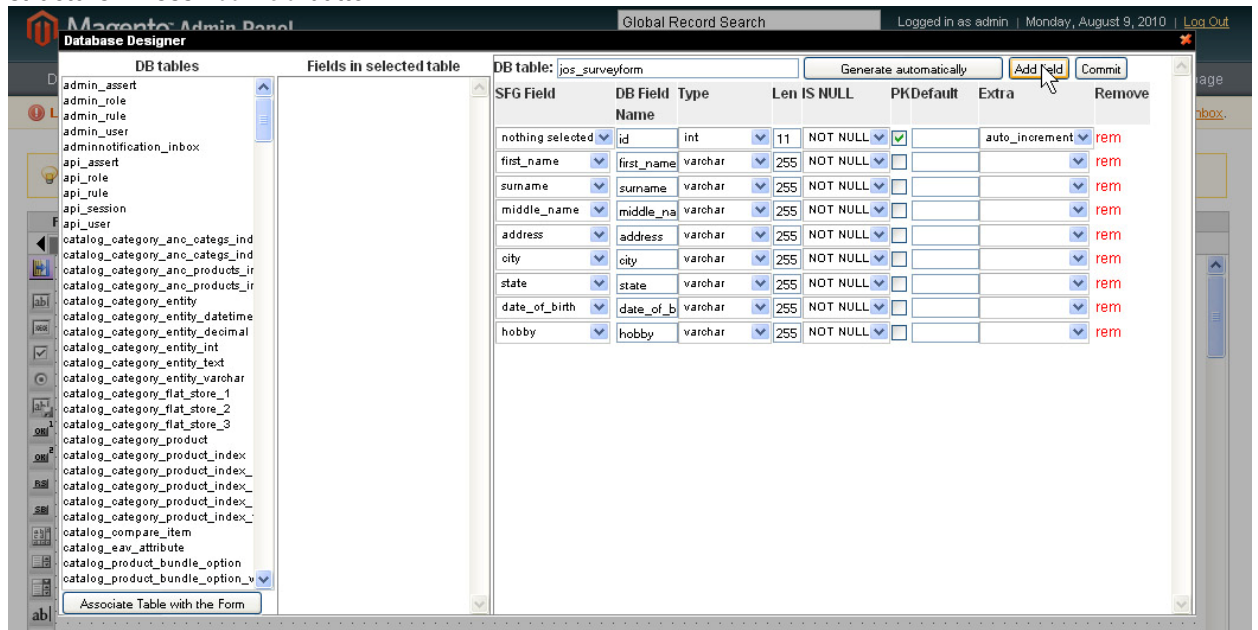
Save the form after any changes in DB.

4.4.2. Add new fields to DB (manually). Delete fields

If you add new fields to your form after the DB table has been created for it – they should be added to the table as well, otherwise the data entered in these new fields will not be saved.

If your form has submissions already – please add new fields manually (if you re-generate DB table – all previous data will be overwritten).

To add a field manually open Database Designer from your form. You will see the current table's structure. Press **Add Field** button.



A new field will appear on the bottom of the structure. You will need to add its:

- SmartFormer Gold field (select its name from the drop down)
- Name (enter the same name as in SmartFormer Gold field or a custom one)
- Type (select from the drop down)

- Length
- Is Null (yes or no. Nulled elements will be added empty)
- Select additional parameters if required

After the new elements are added – press **Commit** button to save the changes.

Save the form after any changes in DB.

4.4.3. Check if the form is bound to a DB table or not

If you are not sure if your form has association with DB or not – open the list of forms (Form Manager) and check Records column.

Form Manager						
<div> Backup Publish Unpublish Clone Delete Settings New </div>						
#	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/
5	Survey form new		1	Unpublished	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/5/
6	College testing		-	Unpublished	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/6/
Upload form: <input type="text"/> Browse... Upload						
Items per page: 20						

no db – your form has no association with DB

1 (or any other number) – your form has a DB table and has submissions

-- - your form has a DB table but has no submissions yet.

4.4.4. Bind your form to an existing DB table (advanced users only!!!)

If you need the data from your form to be written to an existing DB table, you can select the table from the left (all available tables in you DB). When the table is selected (you will see all its fields in the middle) press **Associate table with the form** button. After that you can associate the form's field with the table's fields.

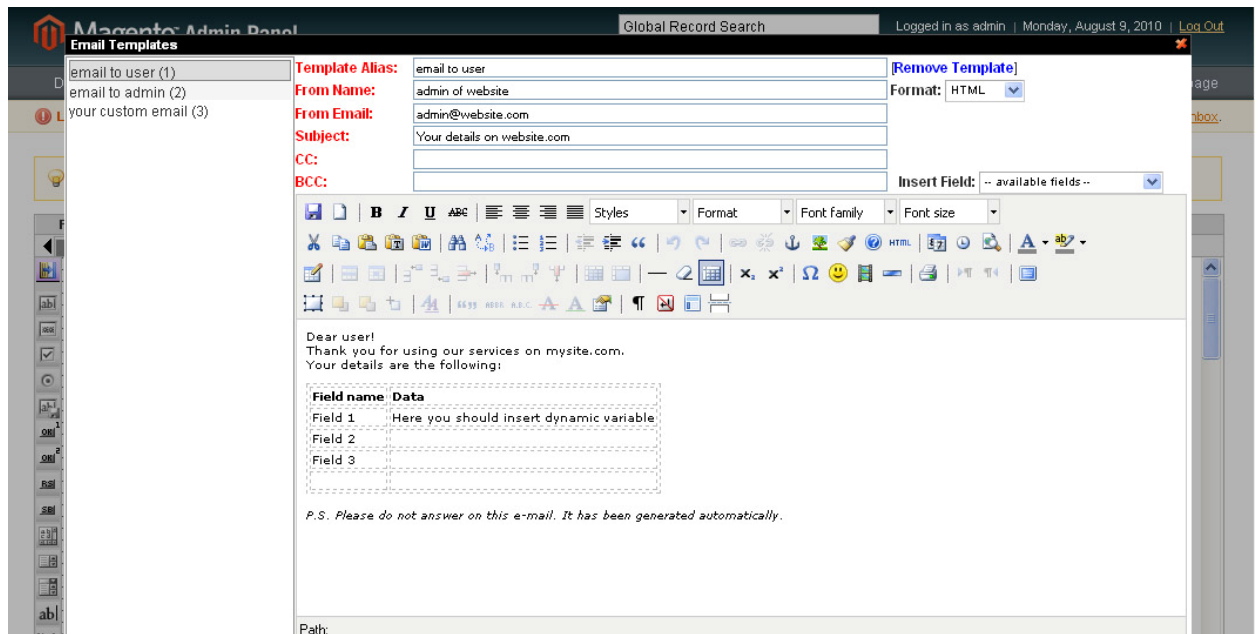
4.5. Email Notifications

Smart Former Gold allows sending email notifications to different users. To do that you should do two things:

4.5.1. Create email templates

Email templates are the skeletons of your emails. They will contain the subject, the email of the "author" (administrator's email or support email, etc.), the text of the email and dynamic variables that will be substituted with the data, entered to the forms.

To create/edit email templates please open your form and select **Tools -> Email Templates** from Smart Former Gold's menu:



On the left you will see the list of available templates. To edit one of the existing ones please click it.

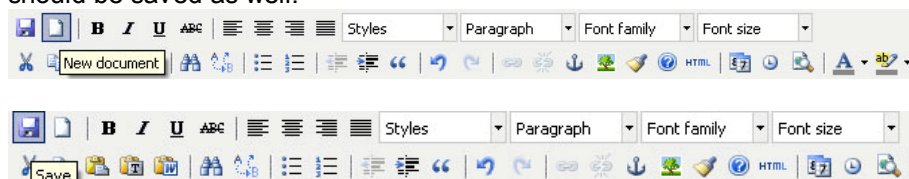
The mail part contains the full text and data of the selected email template. There is the header, where you can select, if the email should be HTML or plain text. You can add the alias of the template, Subject, From information, CC and BCC here as well.

The area for text is the WYSIWYG. Please add the text of email here. Then add the dynamic variables from the drop down "Insert Fields". This drop down contains all elements of your form. When you add an element as variable, in the real email user will see the data, which has been entered in this filed, instead of the variable.

 You text is *Dear {user_name}*

Where *{user_name}* is the name of the field from you form, where users add their name. Then in the real email a user will see *Dear John Smith*

To create a new template please select New Document icon in the WYSIWYG. Create the template and save it by pressing Save icons in the WYSIWYG. All templates that have been edited should be saved as well.



4.5.2. Bind form to email template

To send the emails when the form is submitted you will need to bind the form to the created email templates. To do it please open your form and select the submit button. You will see its properties

MSDN Properties list			
Common	Attributes	Styles	Events
border-width			
border-color			
border-style	- nothing selected -		
background-color			
background-image			
class			
id	mybutton		
name			
value	Submit		
on-click-action	Submit the form		
save-data	<input checked="" type="checkbox"/>		
disable-validation	<input type="checkbox"/>		
after-submit	open next page		
email-to-admin	<input checked="" type="checkbox"/>		
admin-email			
admin-email-template	- nothing selected -		
email-to-user	<input checked="" type="checkbox"/>		
user-email-addr-field	- nothing selected -		
user-email-template	- nothing selected -		

If you want to send notifications to administrator – please check “email-to-admin” check box. There will appear additional fields “admin-email”, where you should enter the email address of administrator (to which the notifications should be sent) and “admin-email-template”, where you select the name of template according to which the email should be formed.

If you want to send the notifications to users (who submit the form), please check “email-to-user” check box. You will see the additional fields “user-email-addr-field”. As we do not know the user’s email in advance, user enters it when submitting the form, we will select the field here, in which the user will enter his/her email. In this drop down all input boxes from your form will be available. Please select your “email” input box.

You should also select the template for user email notifications. Please select the one you need from “user-email-template” field.

After that please save your form. Now your users and/or administrator will receive email notifications.

4.6. Make your form available from the front-end

4.6.1. Check the form using its direct URL before submitting

After your form is created, bound to the DB (if needed) and has the email templates enabled and associated with the form (if needed) you can make your form available from the front-end.

First of all, please make sure your form works correctly before your users start working with it. Find your form in the list of forms and check that it is published. If it is not – check it and press **Publish** button.

There is the Direct URL of your form available here. Following it you can open published your form in the front-end directly.

Please fill in and submit your form. Make sure it is displayed correctly, and all settings are available in it.

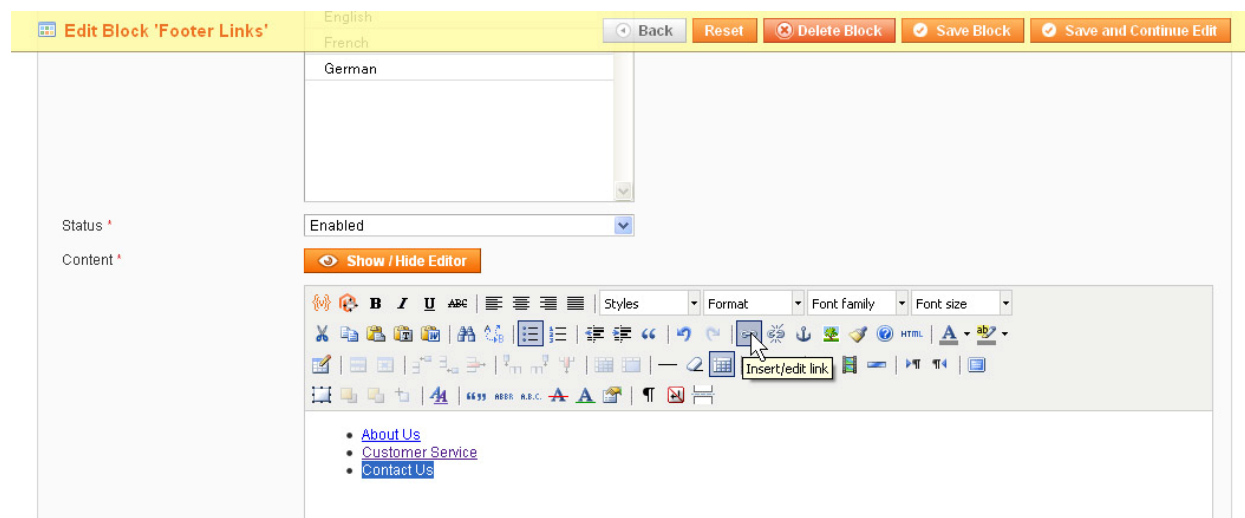
4.6.2. Publish your form using its direct URL.

Form can be bound directly to a menu item with its direct URL.



We need to add a link to the footer near standard “About Us” and “Customer Service” icons. To bind our form there we need to open the Static Block (CMS -> Static Blocks -> Footer Links).

Add new link text in WYSIWYG, click Insert/Edit link icon and paste the direct URL of the form.



Save the changes. Now clicking this new link will open up the form.

4.6.3. Insert a form in file layout

To insert a form in the layout of a file do the following:

- Open Form Manager and find your form in the list. Check the last number in the direct URL of the form – form's ID.



<http://mysite.com/magento2/index.php/sfg/index/index/formid/6/>

This form's ID=6

- Open a file's layout file
- Insert

```
<reference name="content">
    <block type="Itoris_Sfg/Form" name="Form" template="sfg/index/index.phtml">
        <action method="setData"><key>formid</key><value>6</value></action>
    </block>
</reference>
```

where 6 is the ID of your form.

- Save the changes

4.6.4. Add a form to a CMS page

To add a form to a CMS page do the following:

- Open the content of the page
- Add

```
{{block type="Itoris_Sfg/Form" formid="6"}}
```

where 6 is the ID of the form

- Save changes

4.7. Work with submitted data

4.7.1. View the data

When your form is ready and available from the front end – your users can submit it. All submitted data can be managed.

Please find the form, the submissions of which you need, in the list of forms. It will display a number in Records column – how many times it has been submitted.

Form Manager

#	Form Name	Description	Records	Active	Actions	Direct URL to the form
1	Survey Form		no db	Published	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/1/
2	Payment Form		no db	Published	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/2/
3	Registration Form		no db	Published	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/3/
5	Survey form new		2	Published	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/5/
6	College testing		-	Unpublished	Clone Backup	http://server.it/magento2/index.php/sfg/index/index/formid/6/

Upload form:

Items per page: 20

On the image we can see that Survey form new has been submitted two times.

To view the submissions click the number. You will see the list of submissions.

Data List

additional filter conditions:

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

columns to display:

id	first_name	surname	middle_name	address	city	state	date_of_birth	hobby
2	Jane	Doe		Imagine str. 123-45	Somewhere	10	03/10/1974	Fitness
1	John	Smith	L.	Desired str., 234	Wondercity	6	12/04/1970	Cycling

Items per page: 20

On the top there is a filter to find a submission (record) and ability to display selected columns only. Each submission goes in the list. You can view, edit or remove a submission (Actions). If you click View link – you will see full details on the submission.

Magento Admin Panel Global Record Search Logged in as admin | Monday, August 9, 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.](#)

Trial period. 7 days left.

Preview Record

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

Field Name	Posted Value
id	2
first_name (First name)	Jane
surname (Surname)	Doe
middle_name (Middle name)	
address (Address)	Imagine str. 123-45
city (City)	Somewhere
state (State)	10
date_of_birth (Date of Birth)	03/10/1974
hobby (Music)	Fitness

You can edit a submission, this will re-write initially submitted information in the DB. You can physically delete a submission.

4.7.2. Export the data

You can export the submitted data to .csv. Please either select the submissions that should be exported (by checking their checkboxes) or export all of them together.

Export All button will export all available submissions to .csv file

Export button will export the selected submissions to .csv file

Magento Admin Panel Global Record Search Logged in as admin | Monday, August 9, 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.](#)

Trial period. 7 days left.

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

additional filter conditions:

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

columns to display:

id	first_name	surname	middle_name	address
city	state	date_of_birth	hobby	

[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 checked="" type="checkbox"/>	2	Jane	Doe		Imagine str. 123-45	Somewhere	10	03/10/1974	Fitness	View Edit Remove
<input checked="" type="checkbox"/>	1	John	Smith	L	Desired str., 234	Wondercity	6	12/04/1970	Cycling	View Edit Remove

Items per page:

4.8. Additional Tools available in SmartFormer Gold

The tools available in SmartFormer Gold are the following:

PHP editor (**Tools -> PHP editor**) you can add your custom php code here.

HTML editor (**Tools -> HTML editor**) – please add your custom HTML here

JavaScript editor (**Tools -> JavaScript editor**)

CSS editor (**Tools -> CSS editor**)

Validation Rules (**Tools -> Validation Rules**)– validation can be edited here