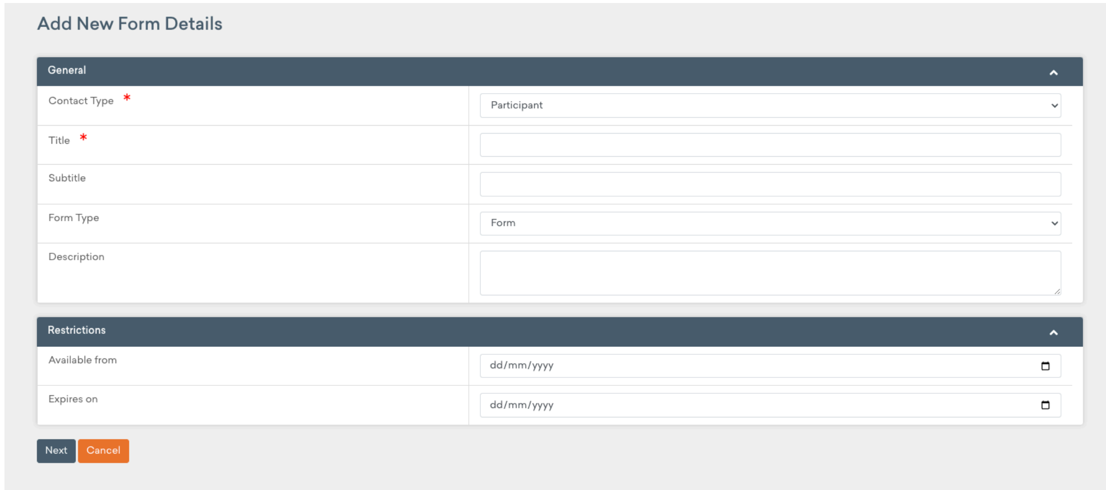
FAQ – How do I create an external form that links a contact to a Session Group?

You can create external forms that are linked to a specific Session Group. When the form is accepted into Views, the contact record generated by the form is automatically associated with the chosen Session Group.

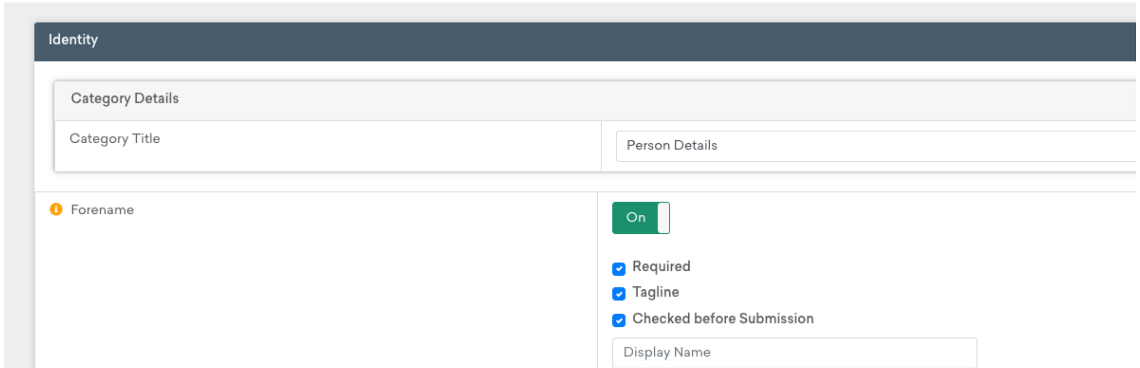
To create a form of this type, you must first create a Session Group Template by following this process:

- Hover over **My Account** and click on **Administration.**
- Select **External Forms** from the **Tools** menu.
- Select **Session Group Template** from the menu on the left-hand side.
- Click on the **Plus** icon.
- Under **Contact Type**, choose the type of record that will be created using the online form (e.g. Participant), and then enter a **Title** and **Description.**
- Under **Form Type**, choose **Session Group Template.**
- If you wish to restrict the period that the form is available to be completed, you can enter a date in the **Available From** and **Expires on** fields.



- Click **Next.**

- Select **On** next to the fields that should appear on the form. Select **Required** if a field should appear as compulsory. If you select the **Checked before submission** field, the user will be asked to confirm their response to this field before saving the form.



- Click **Save.**

You can now use this template to create an external form that links a contact to a Session Group. To do this:

- Hover over **Work** and click on **Session Groups.**
- Click on the name of the relevant Session Group.
- Select **Tools > External Forms** from the menu on the left-hand side.
- Click on the **Plus** icon. 

- Under **Session Group Template**, choose the template that you want to base the external form on, and then enter a **Title** and **Description.**

- Click **Save.**

An external form linked to the Session Group will now be created. Click on the **eye icon** to access the form link. Any contact records submitted via this form will be automatically associated with the Session Group.