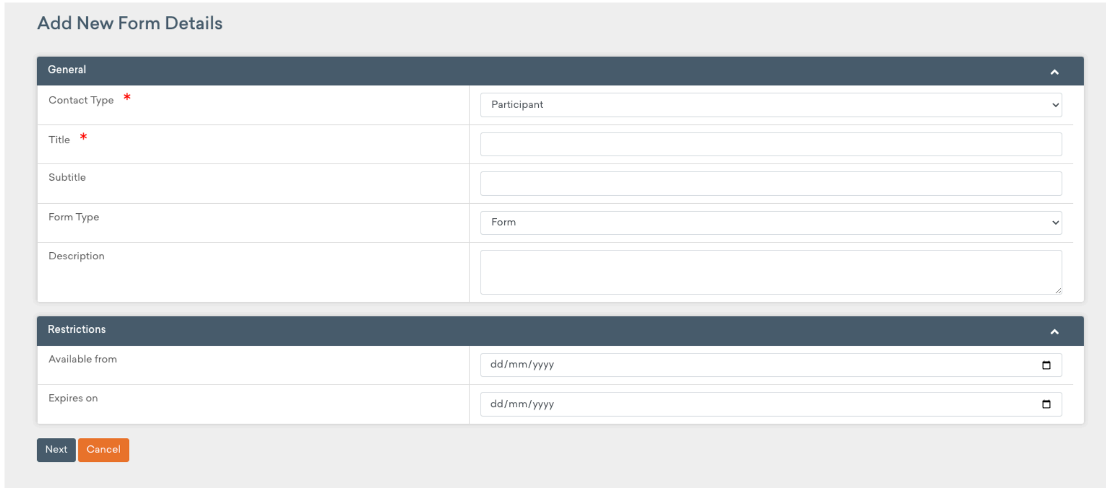
How to Use the External Forms Tool

The External Forms tool can be used to create online forms for people to register directly as a contact on Views. An online form could be added to a website or sent out to a potential service user. You can then review completed forms within your Views account and use these to create new contact records or update existing records.

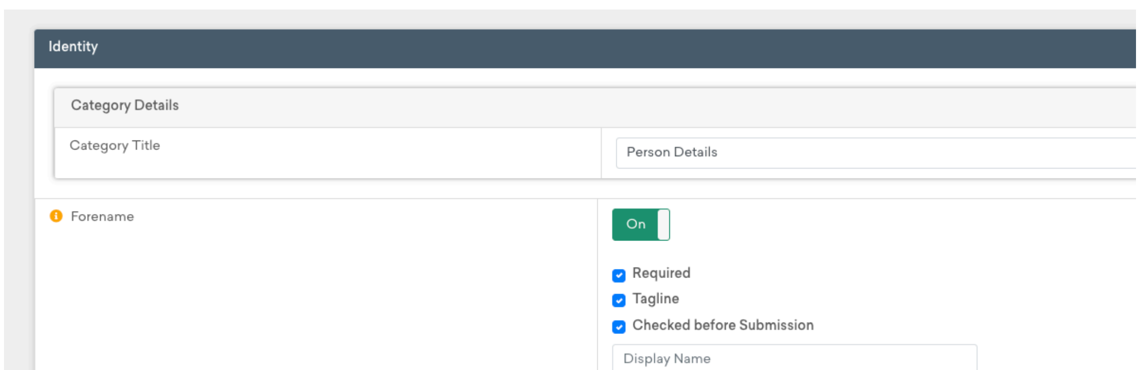
How to Create an External Form

- Hover over **My Account** and click on **Administration**
- Select **External Forms** from the sections 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 **Form**
- 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**

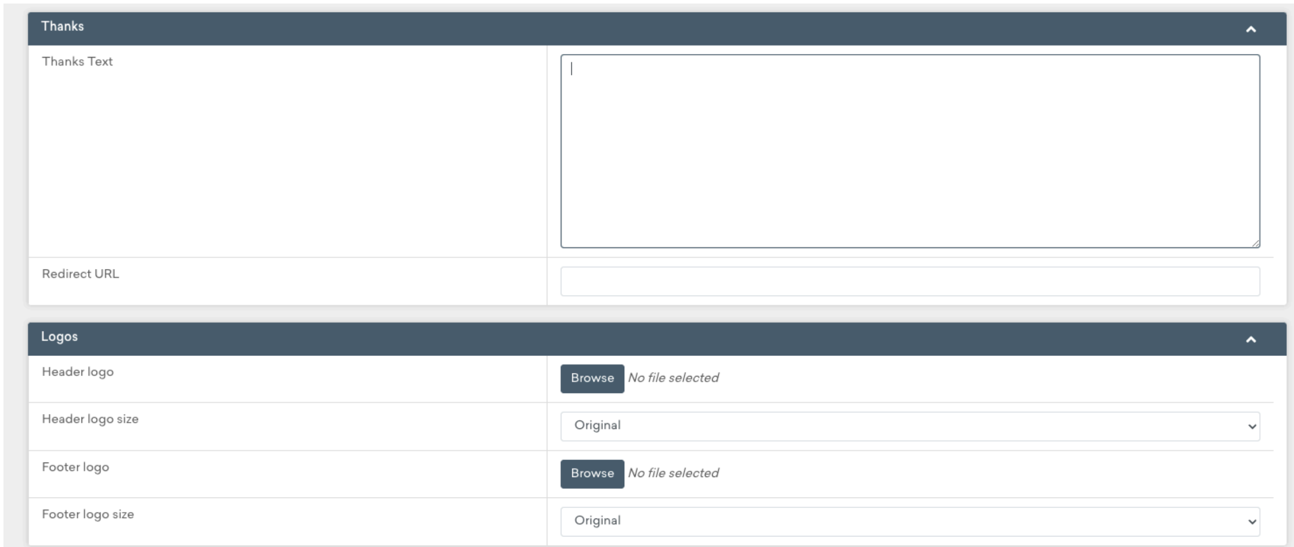
How to Style an External Form

- Select **Form Design** from the sections on the left-hand side

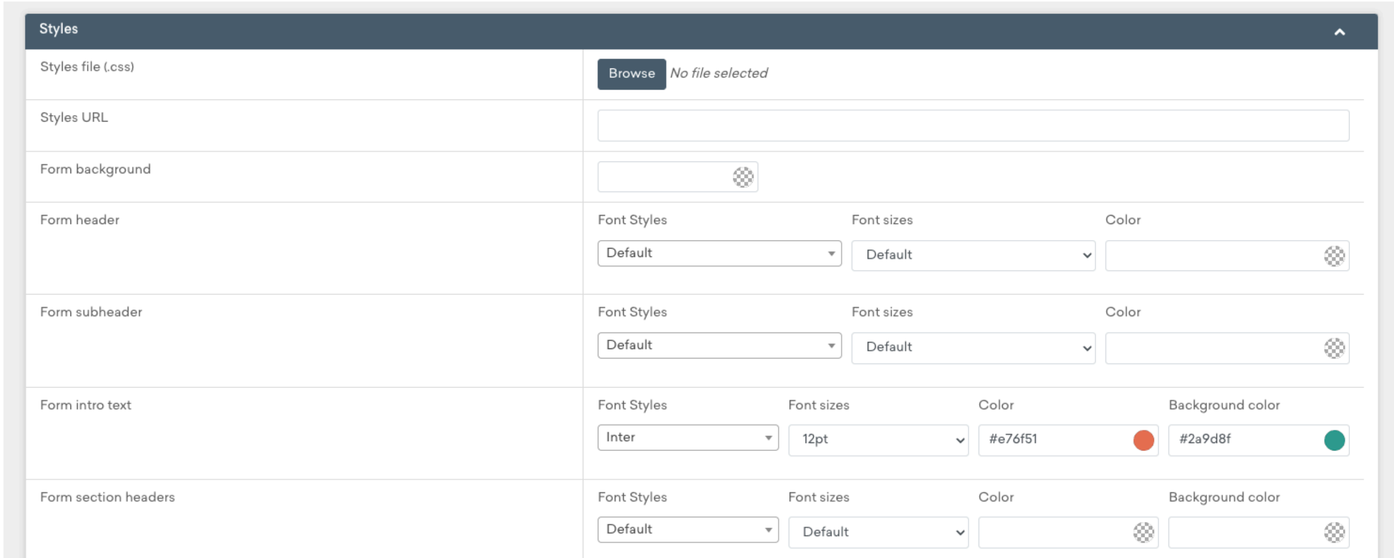
- In the **Layout** section, text can be added to the beginning and end of the form

- In the **Thanks** section, text can be added to display after the form is completed. After completion, the form can also be redirected to a specified web address using the **Redirect URL** field

- **Logos** and **banners** can be uploaded to the Header and/or Footer of the form



- In the **Styles** section, you can upload a .css file into the **Styles file (.css)** field to control the style of the form, or you can set the **Font Style, Font Size** and **Background** colour directly for each section. Alternatively, click on **Actions** at the top of the page and select **Get Form Config** to import the styling from another external form



- When you have finished designing your form, click **Save**

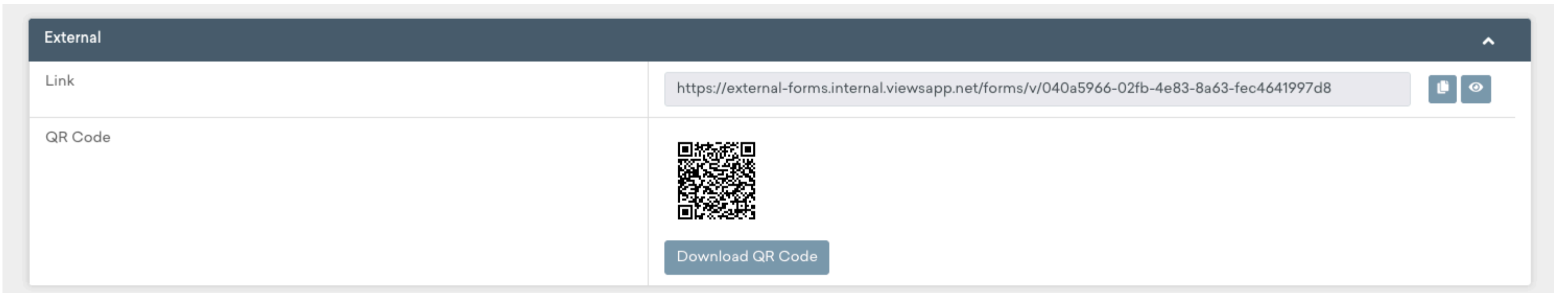
How to Access the Link for an External Form

- Hover over **My Account** and click on **Administration**

- Select **External Forms** from the sections on the left-hand side

- Click on the **eye** icon directly to the right of the form

- The weblink will be displayed in the **Link** field and as a **QR Code**. This can be shared with people that need to register as a contact in your account. Click on the **Copy to clipboard** icon to copy the link



How to Configure Duplicates

To avoid creating duplicate records, completed external forms can be used to update existing contact records. This process can be improved by specifying the fields that are used to search for existing records. For example, the fields 'Forename', 'Surname' and 'Gender' could be set as the default search fields when updating existing records. To configure this:

- Hover over **My Account** and click on **Administration**
- Select **External Forms** from the sections on the left-hand side
- Click on the **eye** icon directly to the right of the form

- Select **Configuration - Duplicate Management** from the section on the left

- Select **On** for the fields that should be used to search for potential duplicates (e.g. 'Forename, Surname, Gender') and click **Save**

How to Enable Email Receipts

Email receipts can be enabled so that the person completing an external form receives a confirmation email. They can also be configured to notify the sender of the form, effectively acts as an alert when a form has been completed. To enable this feature:

- Hover over **My Account** and click on **Administration.**

- Select **External Forms** from the **Tools** menu.

- Click on the **eye** icon to the right of the form you want to edit.

- Select **Configuration – Email Receipts** from the menu on the left.

- In the **Status** field, select **On**, then choose the relevant email field(s) from the **Recipient Fields** list. This determines the address that will receive the confirmation email. *Note: the form must include an email field to use this feature.*

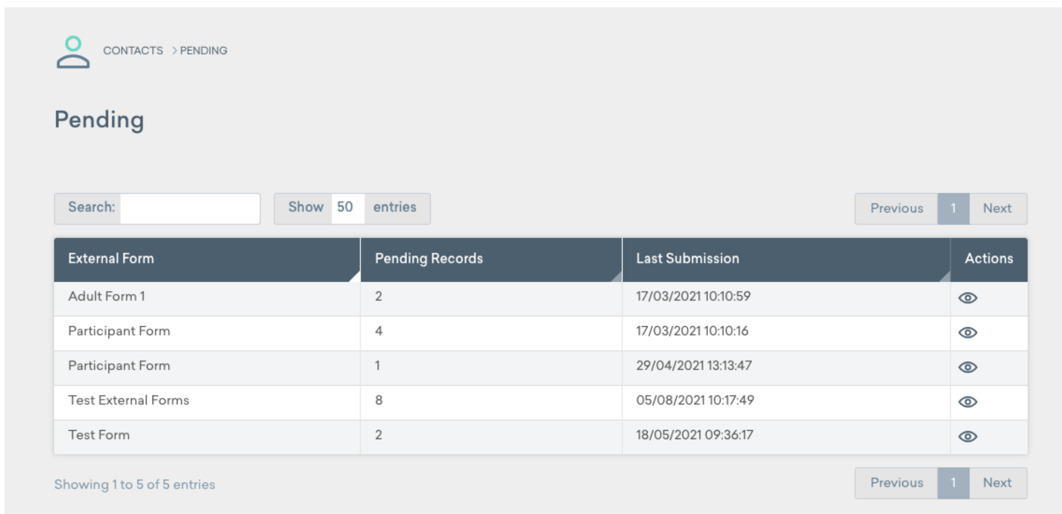
- Under **Sender Name** and **Sending Address**, enter the name and email address that should appear as the sender when the receipt is delivered.

- If you also want the sender of the form to receive a confirmation, set **Include Sender** to **On**, and enter the appropriate email address in the **Sender Address** list. You can enter multiple addresses, separated by commas.

- Under **Template,** select the email template to be used for receipts*, then click **Save.**

Managing Completed External Forms

If at least one external form has been completed, a new area called **Pending** will be added under the **Contacts** section. In this area, all completed forms will be listed:



External Form	Pending Records	Last Submission	Actions
Adult Form 1	2	17/03/2021 10:10:59	
Participant Form	4	17/03/2021 10:10:16	
Participant Form	1	29/04/2021 13:13:47	
Test External Forms	8	05/08/2021 10:17:49	
Test Form	2	18/05/2021 09:36:17	

Showing 1 to 5 of 5 entries

Previous 1 Next

* For instructions on creating templates, see the **How To Create Mail Templates** guide at https://www.substance.net/wp-content/uploads/2024/01/How-to-Create-Mail-Templates.pdf

- Click on the **eye** icon to the right of a form to view the Pending records

- To view a pending record, click on the **eye** icon to the right of the relevant record

There are **three** actions that can be taken with a pending record:

ACTION 1 – Create a new contact record

- Click on **Actions** and select **Add New [Participant]**

- Confirm that all compulsory fields have been completed and click **Save**

A new contact record will be created in your account.

ACTION 2 – Update an existing contact record

- Click on **Actions** and select **Update [Participant]**

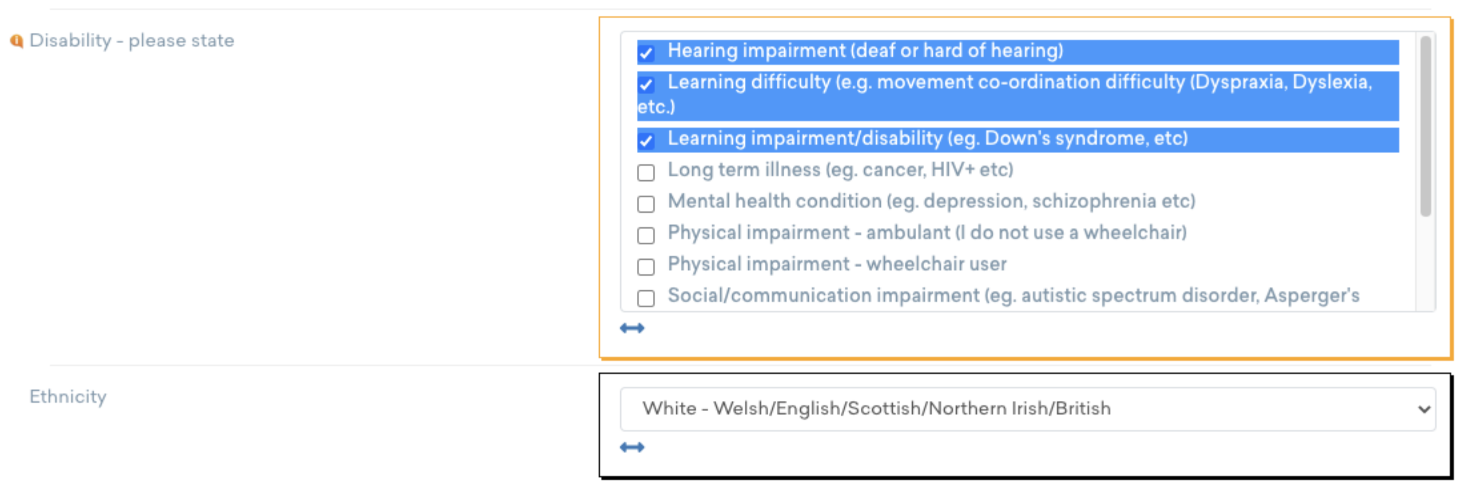
- Any contact records that meet the duplicate search criteria will be listed[†]. Alternatively, the Search bar can be used to search for possible duplicate records

---

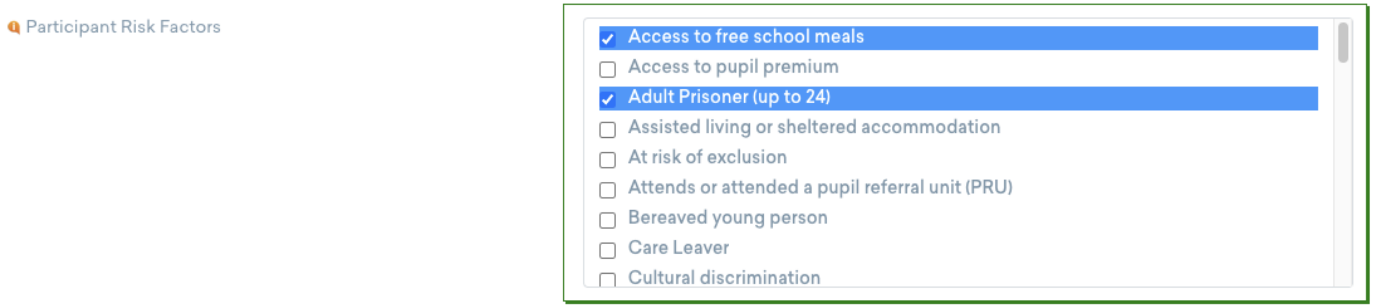
[†] See the **How to Configure Duplicates** section above

- Select the **Pencil** icon to the right of the record to be updated

- If the external form data will overwrite existing data in a field, this field will be highlighted in **yellow**. If you wish to keep the original data, click on the **arrows** icon. When the original data is displayed, the field will be highlighted in **black**



- If the external form will add new data to the contact record, without overwriting existing data, the field will be highlighted in **green**



- Once the form data is in the desired state, click **Save**

The existing record will be updated with the External Form data.

ACTION 3 – Delete the Pending Record

- Click on **Actions** and select **Delete**

- Click **Ok**

The pending record will be permanently removed.

Enabling External Forms for User Groups

To access Pending records, a user needs to belong to a User Group that has the External Forms tool enabled. To give a User Group access to the tool:

Views

- Hover over **My Account** and click on **Administration**
- Select **Security** from the sections on the left-hand side
- Select **User Groups** from the sections on the left-hand side
- Click on the **Cog** icon to the right of the relevant User Group
- In the **Configure** column, set **External Forms** as **ENABLED**, enter your user password, and click **Save**