Formidable Forms® for WordPress®

By Strategy11, LLC

Build Beautiful Forms

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Formidable Forms®
for WordPress®

By Strategy11, LLC

User’s Guide
Formidable Forms® User’s Guide

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Technical Support

For technical support, visit formidableforms.com.
# Table of Contents

1 **Getting Started** ................................................................. 7
   - Installing Formidable Forms ..............................................7
   - Activating Formidable Forms ............................................8

2 **Creating a Form** ............................................................... 9
   - Working with Fields .........................................................9
   - Using Field Settings .......................................................14

3 **Submitting a Form** ........................................................... 15
   - Changing the On Submit Message .....................................15
   - Emailing the Form .........................................................15

4 **Embedding a Form in a WordPress Page** ............................ 17
   - Using the Form Shortcode ................................................17
   - Using the Form Widget ....................................................18

5 **Accessing and Exporting Form Data** ................................. 21
   - Viewing form entries ......................................................21
   - Exporting form data .......................................................22

6 **Troubleshooting** ............................................................. 23
   - Finding help .................................................................23
   - Opening a Support Ticket ...............................................24
Preface

Formidable Forms (Lite) is a free form builder plugin for WordPress. Formidable Forms can be used to create simple and advanced forms that can be easily embedded in a WordPress page. Users of this guide should have a basic working knowledge of WordPress. This user’s guide will cover (1) installing and activating the Formidable Forms plugin, (2) creating a basic contact form, (3) inserting a form into a WordPress page, (4) customizing and emailing a form, (5) accessing form data, and (6) troubleshooting. Form validation and reCAPTCHA spam protection features in Formidable Forms are beyond the scope of this guide. This guide does not cover features or third-party extensions available with the Formidable Forms Pro version.

**Note:** To use this guide, you will need an active WordPress account.
1 Getting Started

This Formidable Forms user’s guide will illustrate the basics of installing and using Formidable Forms to create a working contact form.

Installing Formidable Forms

To install the free (Lite) version of the Formidable Forms plugin:

1. Log in to your WordPress Dashboard.

2. Click Plugins on the menu on the left side of your dashboard (Figure 1).

3. Click Add New.

4. Type formidable in the plugin search bar (Figure 2). WordPress will automatically search for the plugin.

5. Click Install Now (Figure 3).

Caution:
To make sure your plugin will function properly, always check to make sure a plugin has been updated and is compatible with your version of WordPress (Figure 3).
Activating Formidable Forms

To activate the Formidable Forms plugin:

1. Click **Installed Plugins** under the Plugin section of the dashboard menu (**Figure 4**).

2. Click **Activate** under Formidable Forms (**Figure 5**).
2 Creating a Form

After activating the Formidable Forms plugin, you can build a form using fields. Fields are placeholders for information you might want to collect from website visitors such as their name, phone number, email address, or even answers to a survey. You can customize the features of each field in the settings panel.

Working with Fields

To create a simple contact form using custom form fields:

1. Click Build a Form (Figure 6).

2. Click the add new button (Figure 7).

Note: Formidable Forms (Lite) installs a pre-built Contact Us form template (Figure 7). The Pro version installs additional form templates such as User Registration and Real Estate Listings.
3. Type **My Contact Form** in the form name box (Figure 8).

4. Drag the **Text** field from the fields menu and place it in the **Add Fields Here** area (Figure 9).

5. Type **First Name** as a label for the field (Figure 10).

6. Drag another **Text** field from the fields menu and place it under the First Name field.
7. Type **Last Name** as a label for the field. Your contact form should now have the two text fields shown below (**Figure 11**):

![Figure 11. Two text fields in contact form](image)

8. Drag the **Email** field from the fields menu and place it under the Last Name field. Leave Email as the field label (**Figure 12**).

![Figure 12. Email field](image)
9. Drag the **Paragraph** field from the fields menu and place it under the Email field. Type **Message** as a label for the field. Your contact form should have the fields shown below (**Figure 13**):

![Figure 13. Contact form with fields](image)

10. Click the **Create** button to build the form (**Figure 14**).

![Create button](image)
Using Field Settings

To customize the features of a form field:

1. Click the down arrow on the bottom right of the First Name field to open the field settings (Figure 15).

2. Type 200 in the field size boxes to set the width and number of maximum characters allowed in the field (Figure 16).

   ![Figure 15. Field settings](image15)
   ![Figure 16. Field size box with width and maximum characters setting](image16)

   **Note:** To make a field required, check the Required box in the Field Type. This stops a form from being submitted if a required field is left blank.

3. Repeat step 2 for the Last Name and Email fields.

4. Type 400 in the field size box for the Paragraph field. Leave the number of rows high set to 5 (Figure 17).

   ![Figure 16. Paragraph field size settings](image16)
5. Click the **Update** button to save your form (Figure 18).

![Update button to save form](image)

**Caution:**
If you exit the form without updating, your changes will not be saved. Remember to update your form frequently to save your latest changes.

6. Click the **Preview** button and select **On Blank Page** to see what your finished form would look like online (Figure 19).

![Preview button and On Blank Page selection](image)
3 Submitting a Form

After submitting a form on a website, it is customary to have a short notice appear on the webpage to let visitors know that the form was submitted successfully. This is known as the On Submit message. Formidable Forms lets you customize this message. Once a form has been submitted, you can also send the form results to a specific email address.

Changing the On Submit Message

To customize the On Submit message:

1. Click **Settings** on the top menu of your form (Figure 20):

   ![Settings feature](Figure 18. Settings feature)

2. Scroll down to **Messages**. Replace the default message by typing **Thank you for contacting us. We will respond shortly!** in the message box (Figure 21).

   ![On Submit message box](Figure 19. On Submit message box)

Emailing the Form

To email the submitted form responses to a specific email address:

1. Click **Form Actions** within the Settings window (Figure 22).

   ![Form Actions in Settings window](Figure 20. Form Actions in Settings window)
2. Click the down arrow on the right side of the Email Notification setting (Figure 23).

![Figure 21. Down arrow on Email Notification setting](image)

3. Replace the yellow highlighted text below with the email address you want to receive the form results (Figure 24). The To box is the email recipient address.

![Figure 22. Email recipient field and Subject box](image)

4. Type My Contact Form Results in the Subject box.

5. Click the Update button to save the form.
4 Embedding a Form in a WordPress Page

Once your form is finished, you need to embed it in a WordPress page for it to be visible online. The two ways to embed the form is using the form shortcode or the form widget.

Using the Form Shortcode

To embed a form using the shortcode:

1. Click **Forms** under Formidable on the dashboard menu. Your form will be listed showing its shortcode (**Figure 25**).

   ![Formidable shortcode](image)

   **Figure 23. Formidable shortcode**

2. Copy the **shortcode** and paste it into a page (**Figure 26**).

   ![Form shortcode in WordPress page](image)

   **Figure 24. Form shortcode in WordPress page**
3. Click **Update**, then **Preview Changes** to see what your form will look like online. You form should look like this (**Figure 27**):

![Formable Form widget](image)

**Figure 25. Online view of contact form on a page**

**Using the Form Widget**

To embed a form using the widget:

1. Click **Appearance**, then **Widgets** on the dashboard menu.
2. Select the **Formidable Form widget** (**Figure 28**).

![Formable Form widget](image)

**Figure 26. Formidable Form widget**
3. Drag the **Formidable Form widget** onto a footer or sidebar of your choice.

4. **Type** **Contact Us** **as a title**. **Select** “My Contact Form” from the drop-down menu if necessary (**Figure 29**).

![Formidable Form widget placed in a footer](image)

**Figure 27. Formidable Form widget placed in a footer**

5. **Click** **Save**.
6. View your page to see what your form looks like online in a widget (Figure 30).

![Formidable Form in a widget](Image)

*Figure 28. Online view of Formidable Form in a widget*
5 Accessing and Exporting Form Data

Accessing your stored form data allows you to see the information visitors have entered into your Formidable Form. You can also export the data as a .csv file or you can export the form itself as an XML file.

Viewing Form Entries

To view data submitted in your form:

1. Click **Entries** from the top menu of your form to display a list of entries (Figure 31).

```
Build     Settings  Entries  Switch Form
```

*Figure 29. Entries feature*

2. Click **View** to see details of an individual form entry as shown in the sample entry below (Figure 32):

```
ID | First Name | Last Name | Email          | Message                                      
---|------------|-----------|----------------|---------------------------------------------
1  | John       | Doe       | jdoe@jdoe.com  | Please send information about your services.
```

*Figure 30. List of form entries with sample entry*

**Note:** Since My Contact Form has no entries, Formidable Forms will display a **No Form Entries** message.
Exporting Form Data

To export form data:

1. Click **Import/Export** on the Formidable menu in the WordPress dashboard (Figure 33).

2. Select **CSV or XML** from the Export drop-down menu. Data to Export will be selected automatically.

3. Select **My Contact Form**.

4. Click **Export Selection** (Figure 34).
6 Troubleshooting

If you need help with a Formidable Form, there is extensive documentation available on our website. You can also submit a Support Ticket if you need further assistance.

Finding Help

To access documentation about Formidable Forms:

2. Click the Support link located on the main menu of the website.
3. Click Browse the Docs under Documentation to get plugin help organized by category.
Submitting a Support Ticket

To submit a support ticket to get further help using Formidable Forms:

2. Click the Support link located on the main menu.
3. Click Open support ticket under Help Desk.
4. Enter your contact information to sign up for support.

**Note:** Formidable Forms answers support tickets for free and paid plugin versions. Support is available during the hours listed below (Figure 35).

<table>
<thead>
<tr>
<th>Business Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Days of the Week</strong></td>
</tr>
<tr>
<td>Monday</td>
</tr>
<tr>
<td>Tuesday</td>
</tr>
<tr>
<td>Wednesday</td>
</tr>
<tr>
<td>Thursday</td>
</tr>
<tr>
<td>Friday</td>
</tr>
</tbody>
</table>

**Note:** Support is not available on weekends or during major U.S. holidays

*Figure 33. Days and hours of support*
Index

A
activation, 8

C
compatibility, 7

D
data
  accessing, 21
  exporting, 21
documentation
  plugin help, 23

E
e-mail
  field, 11
  notification setting, 16
  recipient, 16
e-mailing
  form results, 15
eMBEDDING
  forms, 17
exporting
  form data, 22

F
field
  email, 11
  label, 10
  paragraph, 12
  text, 10
  type, 13
  width, 13
field settings, 13
fields
  adding new, 9
  working with, 9
form
  defining actions, 15
  creating, 9
  e-mailing results, 15
  embedding, 17
  exporting data, 22
  naming, 10
  changing settings, 15
  using shortcodes, 17
  using widgets, 18

I
installation, 7

L
labels
  field, 10

M
menu fields, 10

O
on submit
  changing message, 15

P
paragraph
  field, 12
plugin
  activating, 8
  checking compatibility, 8
  installing, 7
  searching for, 7
  previewing, 14
S
shortcode
   embedding a form, 17
support ticket
   submitting, 24
T
templates, 9
troubleshooting
   documentation, 23
   support tickets, 23
V
viewing
   form entries, 21
W
widget
   form, 18
   width
   field, 13
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