

Etail Systems Tip Sheet

Objective: To create a form in COMS.

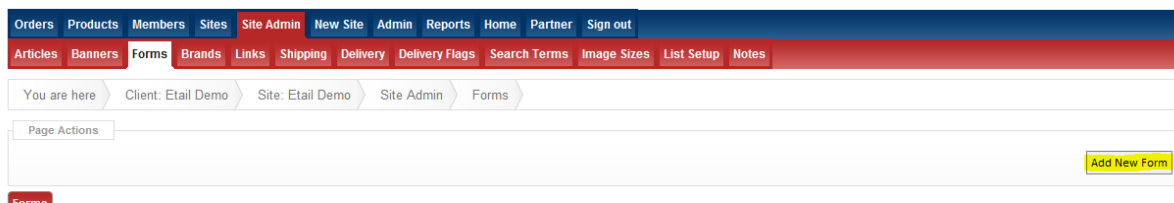
The following tells you how to achieve this;-

A form can be used for a variety of reasons – instead of putting an email address on your site, you could create a contact form. If you want people to do returns via a form, or use it for customer feedback, you can do this also.

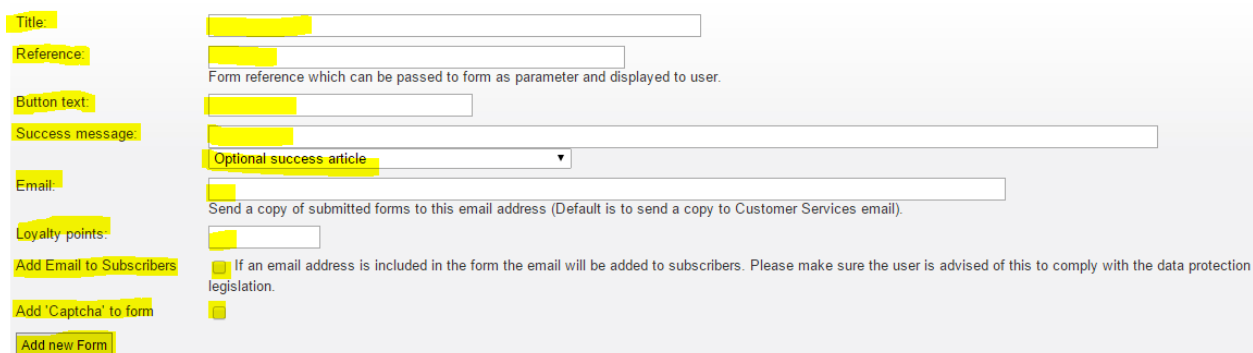
To create a form, go to 'Site Admin' → 'Forms'.



Click the 'Add New Form' button on the right hand side of the page.



This page will then appear.



Title [Text input field]

Reference [Text input field]
Form reference which can be passed to form as parameter and displayed to user.

Button text [Text input field]

Success message [Text input field]

Optional success article [Dropdown menu]

Email [Text input field]
Send a copy of submitted forms to this email address (Default is to send a copy to Customer Services email).

Loyalty points [Text input field]

Add Email to Subscribers ☐ If an email address is included in the form the email will be added to subscribers. Please make sure the user is advised of this to comply with the data protection legislation.

Add 'Captcha' to form ☐

Add new Form [Button]

Title – The name of the form that will appear in the form list – if you're having a lot of forms on your site, make the title memorable and relevant.

Button text – What do you want the button to say? This is the button that the customer clicks to submit the form.

Success message – What do you want the page to say once the customer has submitted their form?

Something along the lines of 'Thank you for your message, we'll be in touch shortly.' is a common example. You can also now have an article as a success message, in case you want to link anything in there or have a more styled success message – just select your article from the dropdown.

Loyalty points – Only applies if you have a loyalty scheme. Please contact Etail Systems for more information on this feature.

Add Email to subscribers – Please ask if you require this function.

Add Captcha to form – *This feature is currently in development.*

Once you've filled in all that information, click the button in the bottom left 'Add/Update Form'.

A new box will then appear.

Form Information

Title:

Button text:

Success message:

Loyalty points:

Add Email to Subscribers ☐ If an email address is included in the form the email will be added to subscribers. Please make sure the user is advised of this to comply with the data protection legislation.

Add 'Captcha' to form ☐

| Type | Name | Default value | Value type | Req'd | Display order | |
|-----------------|------------------------------------|----------------------|------------|-------|---------------|--|
| Please select ▼ | | | | | | |
| Text box | Name | <input type="text"/> | String ▼ | Yes ▼ | 1 ▼ | |
| | Field size: 40 | Max length: 40 | | | | |
| | Help message: <input type="text"/> | | | | | |

Add / Update form

First, you need to select what type of boxes you need. You can have as many as you like of each. The following options are:

Check box list – These are like the boxes you've either ticked or not ticked further up this page for the Email Subscribers, for example.

Dropdown List – A dropdown list is what all these options are in.

Radio Button List – These are similar to the check box list, but the buttons are round (as in the example below)

Sub heading – If your form is getting a bit cluttered, split it up with sub headings.

Text area – This is where your customers will type their message.

Text box – These are the little boxes where customers will type their name, email address etc.

An example of how a form can look with Radio Button Lists, text boxes, a dropdown list and a text area is below.

Adding a form

Where am I? > Returns Form

The following fields are required *

Exchange or Refund *

☐ Exchange

☐ Refund

Full Name *

Reason for Exchange of Refund *

Message *

With the text boxes and text areas, you can define how long they'll look on your page, and how many characters you'll allow. In the example, the text area is Rows: 10 Cols: 40, and the text box is Field Size: 40 Max length: 100.

From the back office, this forms look like:

| Type | Name | Default value | Value type | Reqd | Display order | |
|---|-------------------------------|-----------------|------------|------|---------------|--|
| Please select | | | | | | |
| Radio button list | Exchange or Refund | | | Yes | 1 | |
| Help message: | | | | | | |
| | Exchange | | | | 1 | |
| | Refund | | | | 2 | |
| Add Line item to 'Exchange or Refund': | | | | | | |
| Text box | Full Name | | String | Yes | 2 | |
| | Field size: 40 | Max length: 100 | | | | |
| Help message: | | | | | | |
| Drop down list | Reason for Exchange or Refund | | | Yes | 3 | |
| Help message: | | | | | | |
| | I have changed my mind | | | | 1 | |
| | Size/Colour change | | | | 2 | |
| | Item not as ordered | | | | 3 | |
| | Faulty Item | | | | 4 | |
| | Other | | | | 5 | |
| Add Line item to 'Reason for Exchange or Refund': | | | | | | |
| Text area | Message | | | Yes | 4 | |
| | Rows: 10 | Cols: 40 | | | | |
| Help message: | | | | | | |

In 'Name' for any of the options, type what you want that option to be called e.g. in the drop down list, its title is 'Reason for Exchange or Refund', then all the options. It may be good to create a 'Please select' option that will go to the top of your dropdown list, rather than just having the top option available. To create an option, just type what you want it to say and click the green 'add' button. To delete an option, click the red 'delete' button. To edit an option, type whatever it is you want to change, and click the two green arrows, the 'update' button.

If you need help with adding forms, please email support@etailsystems.com or call 0844 482 0908.