Dynamics 365 Solution User Guide

ProWebForm 1.4.x

Version 1.2

April, 2019

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1. Create new ProWebForm

This section describes how to create a new ProWebForm.

1.1. Create a ProWebForm

Applies to User Role: ProWebForm User
Applies to License: ProWebForm Standard, ProWebForm Professional

Navigate to: ProWebForm / PWF Webforms

Clicking the "New" button will open the form to create a new *ProWebForm Webform*.

Figure 1: Create a new ProWebForm
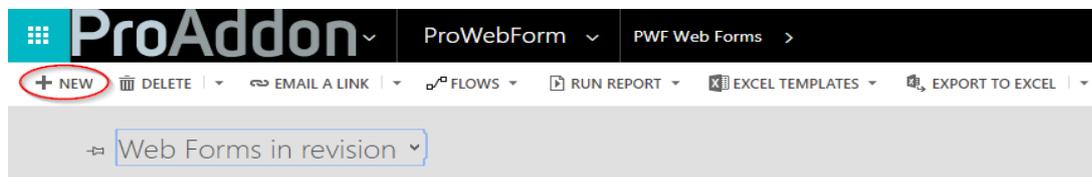
Note: The currently created *ProWebForm* is now visible in the "Web Forms in revision" view at *ProWebForm / PWF Web Forms*.

1.1.1. Single Form or Main Form with Sub Form(s)

Single Form
Applies to User Role: ProWebForm User
Applies to License: ProWebForm Standard, ProWebForm Professional

A one-page form containing all the assigned fields.

Figure 2: Type - single form

Main Form with Sub Form(s)
Applies to User Role: ProWebForm User
Applies to License: ProWebForm Professional

A form which has the possibility to assign one or more sub forms to the *ProWebForm Web Form*.
Each sub form can be linked to its own CRM Entity, see point 1.1.3 for more information on how to link CRM Entities to a *ProWebForm*.

A sub form can be added the same way as adding form fields to a *ProWebForm*, point 1.1.5, with the only difference being in the "Sub Form" sub grid to add the new record. From then on repeat the progress for creating a new *ProWebForm Web Form*.

The Main Form

| Main Form input * | Main Form input |

The Sub Form

Field 1	Field 2	
Field 1	Field 2	+

Send

Figure 3: Type - Main Form with one Sub Form

1.1.2.   ProWebForm Parameters

* mandatory fields

Name*
The name for the new *ProWebForm.*

Type*
The type of *ProWebForm* that should be created, see point 1.1.1 for more information on the *ProWebForm* types.

Title
The title which will be visible on the *ProWebForm Web Form* after publishing.

Notification User

    The user which will be notified when a new *ProWebForm* has been submitted. This user will receive an email with a link to the submitted record. If you set a notification user, you cannot set a notification contact anymore (see next section).

Notification Contact

    The contact which will be notified when a new *ProWebForm* has been submitted. This contact will receive an email with a link to the submitted record. If you set a notification contact, you cannot set a notification user anymore (see previous section).

Campaign

    When a *ProWebForm* has a campaign linked to it, it will generate on top of the by default generated *PWF Activities* a campaign activity for this campaign.

Submit message

    This message will be shown to the end-user after submitting a *ProWebForm*.

Submit button text

    Change the default text which will be shown on the "Submit" button of the form.
    Default: *Submit*

Redirect URL

    After the end-user submits a *ProWebForm* he will be redirected to this URL.
    Note: When used in combination with "Submit message", the end-user will be redirected to the URL after viewing the "Submit message" page.

HTML DIV-only

Instead of a complete HTML document, only a DIV element will be shown.
It references to all the selected scripts in the section.

You can choose between these options:

None – JavaScript and CSS will both be excluded of the form
Both – JavaScript and CSS will both be included in the form
JS only – Only JavaScript for the library will be included in the form
CSS only – Only CSS for the library will be included in the form

Include libraries	
jQuery	None
jQuery UI	JS only
jQuery Validate	Both
jsGrid	CSS only
reCAPTCHA	☑

Figure 4: ProWebForm parameters - HTML DIV only

Prefilled Form*

Defines, if the *ProWebForm* should be filled with corresponding data from the end-user.
Note: the required data hast to be available in the system.
Tip: This feature can be useful for providing a form to the end-user his personal details.

Serverside validation

If checked, serverside validation of e-mail-addresses and required fields will be done. If validation failed, the ProWebForm activity will be created but a possibly mapped entity record will not be created. ProWebForm activity status will be "Validation failed".

Event registration

Defines that the WebForm is used for event registrations.
Only checkable if the related entity is contact. If checked, notification user/ notification contact and campaign will become required fields.
Automatically creates three new fields for first name, last name and participation (radio button – option labels can be changed). For each submit a campaign response will be created for the selected campaign with a response code of either "Participate" or "Don't participate".

Related Entity

Contains the mapping to a CRM Entity.
For more information on mapping a *ProWebForm* to a CRM Entity, see point 1.1.3.

Captcha

If checked, the end-user must validate with "I'm not a robot" by checking the checkbox.
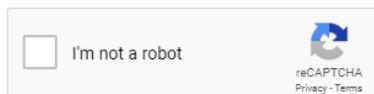
Figure 5: ProWebForm parameters – Captcha

Note: To use this feature, *captcha* needs to be configured. How to configure captcha is described in the *ProWebForm Setup Guide* delivered together with the solution.

Valid From – Valid To

If you create a new *ProWebForm*, it will by default be valid for three years (date counts starting from the date it was created).

Note: this can be changed at any time, by editing the *ProWebForm*. See point 1.4.

URL

The URL will be created after the *ProWebForm* has been published for the first time. Afterwards the created *ProWebForm* will be accessible through this link. See point 1.3 for more information.

Double Opt-In

To be conform with the GDPR, double opt-in can be enabled for the *ProWebForm.* When this option is enabled the end-user will receive an email to confirm that his data may be stored.
For more information on how to configure *Double Opt-In*, see point 1.1.4.

1.1.3. Map to a CRM Entity

Applies to User Role: ProWebForm User
Applies to License: ProWebForm Standard, ProWebForm Professional

Note: This is an optional option

By default, *ProWebForm* generates a *PWF Activity* for each submitted form. By mapping the form to an existing CRM Entity, it will automatically generate an additional record for the linked CRM Entity.

Clicking on "Lookup entities" will open a dialog with all the available CRM Entities in the system. Choose the CRM Entity you want to create the mapping to this CRM Entity.

The CRM Entity can be cleared or changed at any time.
Note: this will also delete any made mappings in the fields. See point 1.2.1.

1.1.4. Configure Double Opt-In and parameters

Applies to User Role: ProWebForm User
Applies to License: ProWebForm Standard, ProWebForm Professional

By checking this checkbox, the end-user will receive an email to confirm that his details can be saved in the system. Double Opt-In is only available, if the WebForm is mapped to either contact, account or lead entity.

* mandatory fields

Delete unconfirmed records (days)*
> If the end-user does not confirm the above mentioned received email, all data about this user shall be deleted from the system. This parameter defines, after how many days of not confirming, the data should be deleted from the system.

Sender User*
> The user account where from the confirmation emails should be sent to the end-user.

Redirect URL
> After confirming the double opt-in, the end user will be redirected to this URL.

Template type*
> **Standard**
>> The default CRM template will be used to send the email with.

> **Mandrill**
>> Create an own template on MailChimp to use as double Opt-In template.

Below parameters do only apply when template type is set to "Mandrill" :

Sender Contact*
> The contact wherefrom the confirmation emails should be sent to the end-user.
> Note: Only "Sender user" or "Sender contact" is required to be configured.

Subject*
> The subject used for the confirmation email.

Mandrill Template*
> Assign a mandrill template to be used for the confirmation email. Click on "Lookup templates" to choose your template.
> Note: make sure to first synchronize the system with Mandrill to have access to all templates.

Figure 6: Configure double opt-in - Mandrill template

After the submitter of the form received the double-opt-in e-mail and confirmed it by clicking the included link, the date of the confirmation will be stored on the CRM-record (contact, account or lead). On the contact form you have a tab 'ProWebForm' where the confirmation date is visible.
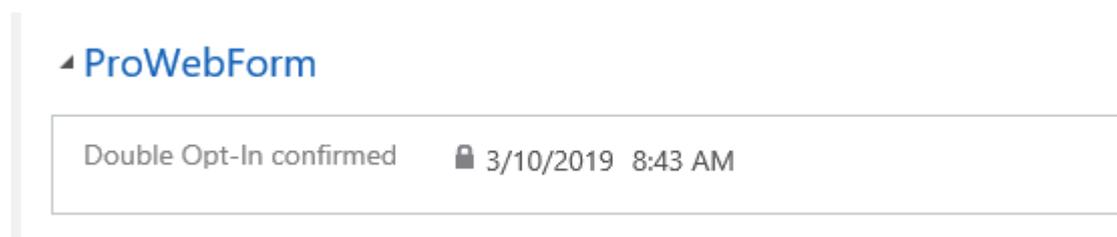
1.1.5. Add form fields

Applies to User Role: ProWebForm User
Applies to License: ProWebForm Standard, ProWebForm Professional

By clicking the "+" in the *PWF Web Form Fields* sub grid, a new window for the creation of a new *PWF Web Form Field* will open.

Figure 7: Add form fields to ProWebForm

Repeat this process for every needed field on the form.

Note: See point 1.2, for more information about the parameters of a form field.

Note: To add extra fields to a published *ProWebForm* you must enable editing. See point 1.4 for more information.

1.1.6. Add custom CSS

This is an optional option.

Define the CSS classes you have used during the creation of the form fields.

Examples can be found at point 4.2.

Note: This is not an editor and thus it is only recommended to paste the CSS in.

1.1.7. Add custom JavaScript

This is an optional option.

Define the additional JavaScript that should be executed on your form.

To define JavaScript for a field, the form must be published. This way all fields get an assigned ID. Afterwards the fields can be accessed from JavaScript through this ID.

Note: This is not an editor and thus is only recommended to paste the CSS in.

1.2. Form field parameters

Note: Some parameters may not be available after changing the "Field Type" field.

* mandatory fields

Label*

This text will be shown to the end-user, to provide more information on what is expected to be filled in.

Hyperlink

The Hyperlink will be added to the text entered in the "Label" field. Clicking the text will redirect the end-user to the given URL.

Web Form*

Contains the relationship to the Webform field was created for.
Note: This is *automatically filled in, when opened through the sub grid.*

Display order*

Defines the position of the field in the form. *Integer value.*
Note: *Automatically filled in with the next available number.*

Tooltip text

When hovering over the input field, the text entered in this field will be shown to the end-user.
Note: *For an example, hover over the input fields in this "new PWF Webform field" form.*

Placeholder

If no data is entered in the input field or the field has no focus, this text will be shown to the end-user.

Validation message

The end-user will get this message, if the requirement of the field is not fulfilled. For example, a mandatory field was left empty, an uploaded file was too big, etc.

Field length

Defines the maximum characters that can be entered in the corresponding input field. If this limit is reached, the end-user cannot enter any additional characters.

Required

Is the field required for the end-user to fill in.

Read only

If set to "yes", the end-user cannot make any changes to this field.

Hashtag

The name of a Hashtag which will be assigned to the newly created mapped entity record on submit see point 1.1.3. This option is only available for fields of type 'Checkbox'. The tag will be assigned if the checkbox in the HTML form was checked. This functionality requires ProHashTag to be installed.

Default value

The field can show a default value when the end-user opens the form.

Field Type*

Defines the type that will be used for the field.
The following options are possible:

- Text
- Multiple text
- Number:
    - Maximum value
    - Is decimal
- Drop down list*
- Radio button*
- Checkbox
- Multiple checkbox*
- Date
- Phone number
- E-mail address
- Hidden
- File upload:
    - *Accepted file type*: Enter any allowed file type in the MIME type template separated with a ",". An example of a valid MIME type would be "images/jpeg", "images/*", "video/quicktime"
    - *Append to mapped entity: When set on "yes" the uploaded file will be attached as an annotation on the newly created record, else only the PWF Activity will be created for it.*

For field types marked with "*" the options are entered in the corresponding field "Options" separated with enters.

Search Duplicates

When set to "Yes", a duplicate check will be executed. This check will only return a positive result when it finds a record that contains all the *ProWebForm* field values with their "search duplicates" parameter set to "Yes".
If the check returns a positive result, no new record will be created. However, the submitted form values can still be found in the *PWF Activities*, see point 1.7.
If the check returns a negative result a new mapped entity record, see point 1.1.3, will be created.

CSS classes

Define the needed CSS classes for the field. Any CSS classes defined here should be configured in the "Add custom CSS" field on the webform, see point 1.1.6.

1.2.1. Map form fields

If a webform is mapped to an entity, each field can be mapped on its own to this entity's field.
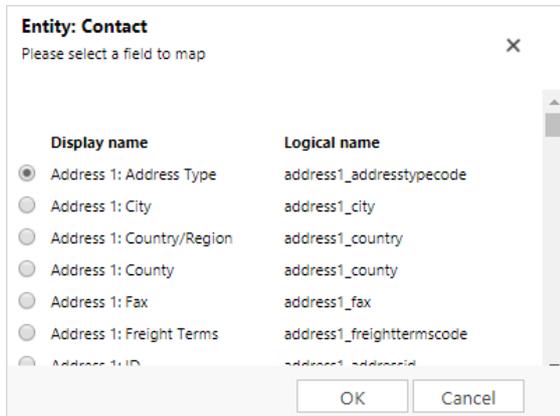Clicking "Lookup fields" will open a dialog to allow you selecting an existing entity field.

Entity: Contact
Please select a field to map   ×

	Display name	Logical name
⦿	Address 1: Address Type	address1_addresstypecode
○	Address 1: City	address1_city
○	Address 1: Country/Region	address1_country
○	Address 1: County	address1_county
○	Address 1: Fax	address1_fax
○	Address 1: Freight Terms	address1_freighttermscode
○	Address 1: ID	address1_addressid

OK   Cancel

Figure 8: ProWebForm field - map field

1.3. Publish and test the ProWebForm

To publish a *ProWebForm* click on "Publish". After the page refreshes the URL attribute of the *ProWebForm* will be filled in. This is the URL that can be used for accessing the *ProWebForm*. The *ProWebForm* can also be accessed by clicking on "Open in Browser".
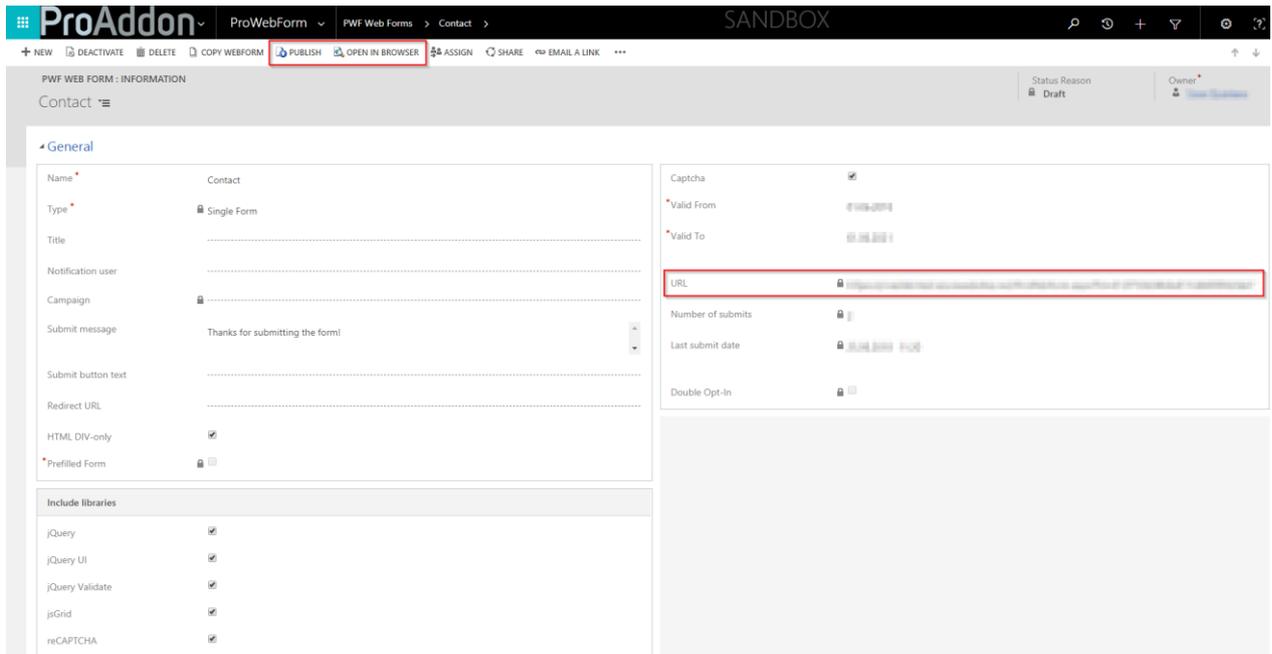

Figure 9: Publish and test the ProWebForm

When opened in the browser the *ProWebForm* can be tested and submitted. This is also the final *ProWebForm* that can be used.

Figure 10: ProWebForm example with all options displayed

1.4.   Edit a ProWebForm

A *ProWebForm*, even already published *ProWebForms,* can be edited at any time to make additional changes.

Click the "Revise" button to make it possible of changing the *ProWebForm*.

Figure 11: Edit a ProWebForm - Revise

Note: If this button is not visible it may mean that the *ProWebForm* has not been published yet and is still in the "Draft" state.

Figure 12: Edit a ProWebForm - Draft status

Note: Refresh the *ProWebForm* page with CTRL + F5, when the *ProWebForm* does not show any made changes after clicking "Publish" again.

1.5.   Copy a ProWebForm

By copying a *ProWebForm*, a new *ProWebForm* will be created. This new Prowebform will contain all fields, mappings, custom texts that were defined in the original one. All changes can be freely made to this new *ProWebForm*.

Figure 13: Copy a ProWebForm

1.6.   Use the ProWebForm

Open the *ProWebForm* by clicking "Open in browser" or by copying the URL into a new browser tab. Open the option with a name like "View page source" by clicking right with your mouse in the current page and choose the option "View page source". Copy the now visible code and use it in the needed locations.

The *ProWebForm* can also be embedded into an application by using the URL. The following can be achieved by copying the created URL into an iframe.

<iframe src="Generated *ProWebForm URL*"></iframe>

Replace "*Generated ProWebForm URL*" with the URL found on the *ProWebForm Webform page*.
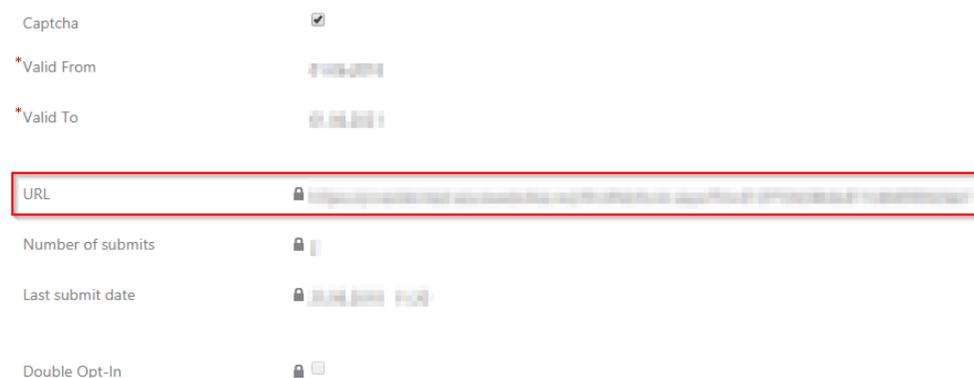

Figure 14: Use the ProWebForm

The WebForm can also be embedded in WordPress by using our WordPress Plugin (see Chapter 2).

1.7.   PWF Activities

Navigate to: ProWebForm / PWF Activity

For each submission of a *ProWebForm,* a new *PWF Activity* will be created. This *PWF Activity* contains all the data which has been filled in the *ProWebForm*.

2. WordPress Configuration

This section describes how to add new WebForms into your WordPress page by using the ProWebForm WordPress plugin.

2.1. Create a new ProWebForm

To add a new ProWebForm into your WordPress page, enter your WP admin panel and navigate to "ProWebForm Forms/New WebForm"
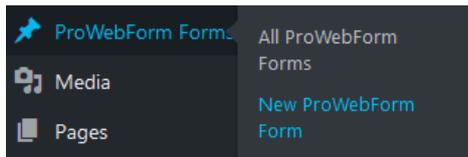

Figure 15 WP: New WebForm

At the ID field add the FID of the WebForm already created in Dynamics.
You find the ID at the URL field of the WebForm (see Section 1.3)

Figure 16 WP: New WebForm example settings

The "Landingpage" defines the callback page, which is called after a successful submit of the form.
You can add here also additional styles to the page.

2.2. Include a WebForm in a page

After you have published the ProWebForm you receive a "Shortcode".

Figure 17 WP: Shortcode

This shortcode is needed to include the WebForm into your page.
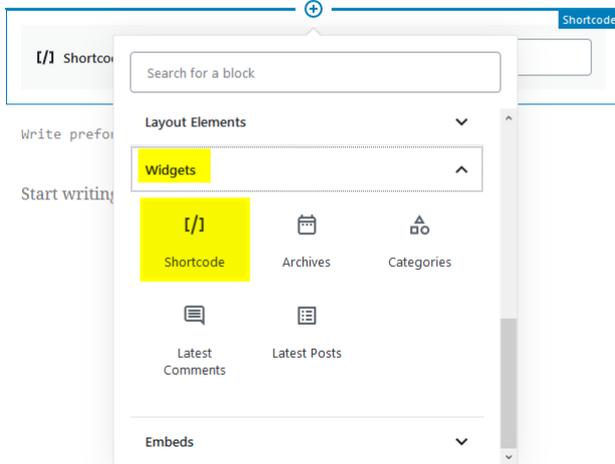
On your page add a Shortcode widget.

Figure 18 WP: Add a Shortcode widget

Then paste the WebForm shortcode in the field.

Figure 19 WP: Shortcode with the Webform ID

After publishing the page, the WebForm should be visible.

3. Support, Feedback

We are happy to hear from you! If you have any questions, don't hesitate to contact us: support@proaddon.com

4. Samples

In this topic different samples will be provided to create a more personalized *ProWebForm*. This by using CSS or JavaScript/jQuery.

4.1.   List of code Samples

4.2. CSS

4.2.1. Multi Column, simple

This topic will provide CSS samples for a uniform layout with multiple columns and rows, such as in *Figure 20: Sample - Multi Column, simple*

Figure 20: Sample - Multi Column, simple

To get an uniform multi column layout simply define the wanted width for each of the columns to the "span" class on each of the *ProWebForm* rows.

```
.pawf_webform>.span
{
      width: 50%; //100% divided by the number of columns, 100% / 2 = 50%
      float: left;
}
```
Code sample 1: CSS - Multi Column(simple), Define amount of columns

To make sure that the inputs fields take the fully provided space, the width needs to be defined as "95%".
Note: Do not use 100%, this will make the fields touch each other.

```
.pawf_webform>.span .p input[type="text"],
.pawf_webform>.span .p input[type="email"],
.pawf_webform>.span .p input[type="number"],
.pawf_webform>.span .p input[type="tel"],
.pawf_webform>.span .p input[type="url"]
{
      width: 95%;
}
```
Code sample 2: CSS – Multi Column (simple), Define full width inputs

4.2.2. Multi Column, empty cells

Figure 21: Sample - multi column, empty cells

To create a layout with multiple rows and multiple columns like in *Figure 21: Sample - multi column, empty cells*, you first of all need to overwrite the default behavior of the created ProWebForm, thats tends to be shown in a one column table.

```
form>.span {
        display: inline-grid !important;
        display: -ms-inline-grid !important;
}


.p {
        display: table-header-group !important;
}
```
Code sample 3: CSS - Multi Column (empty cells), Remove basic behavior

Define a new basic behavior to be used by the ProWebForm. In this example an Grid layout is used to position all fields on the correct locations.

```
.pawf_webform {
        display: -ms-grid;
        grid-template-columns: 75px 175px 175px;
        grid-template-rows: 50px 50px 150px;
        -ms-grid-columns: 75px 175px 175px;
        -ms-grid-rows: 50px 50px 150px;
        table-layout: inherit;
}
```
Code sample 4: CSS - Multi Column (empty cells), Add new basic behavior

Now it is only necessary to position the fields in the correct row and column of choice. For the example seen in Figure *21: Sample - multi column*, the following grid could be imagined with the corresponding CSS:

Salutation	Firstname	Lastname
	E-mail	Phone
	Comment	Comment

```css
.span:nth-child(1) {
        grid-column: 1;
        grid-row: 1;
        -ms-grid-column: 1;
        -ms-grid-row: 1;
}
.span:nth-child(2) {
        grid-column: 2;
        grid-row: 1;
        -ms-grid-column: 2;
        -ms-grid-row: 1;
}
.span:nth-child(3) {
        grid-column: 3;
        grid-row: 1;
        -ms-grid-column: 3;
        -ms-grid-row: 1;
}
.span:nth-child(4) {
        grid-column: 2;
        grid-row: 2;
        -ms-grid-column: 2;
        -ms-grid-row: 2;
}
.span:nth-child(5) {
        grid-column: 3;
        grid-row: 2;
        -ms-grid-column: 3;
        -ms-grid-row: 2;
}
.span:nth-child(6) {
        grid-column: 2;
        grid-column-span: 2;
        grid-row: 3;
        -ms-grid-column: 2;
        -ms-grid-column-span: 2;
        -ms-grid-row: 3;
}
```

Code sample 5: CSS - Multi Column (empty cells), positioning the fields.

4.3.   JavaScript

4.3.1.   Add custom html to an element

Any custom HTML can be added to an element, for example the code below will add a GDPR text to a created checkbox. To access the label of the element, this can be done after the *ProWebForm* has been published and by then replacing "ID" with the created *ProWebForm Field ID*.
Note: the *ProWebForm* needs to be in "Draft" mode again to add the JavaScript.

```javascript
$(document).ready(function () {
 $('label[for="ID"]').html('
        <b>DATA PROTECTION EXAMPLE:</b>I accept the<a>
href="https://example.com/privacyagreement/">Privacy Agreement</a>');
});
```

Code Sample 6: JavaScript – Add custom html to an element.