



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.

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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**).

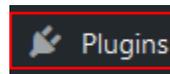


Figure 1. Plugins button

3. Click **Add New**.
4. Type *formidable* in the plugin search bar (**Figure 2**). WordPress will automatically search for the plugin.

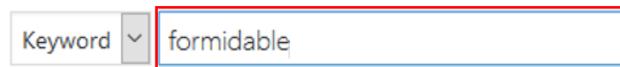


Figure 2. Plugin keyword search bar

5. Click **Install Now** (**Figure 3**).

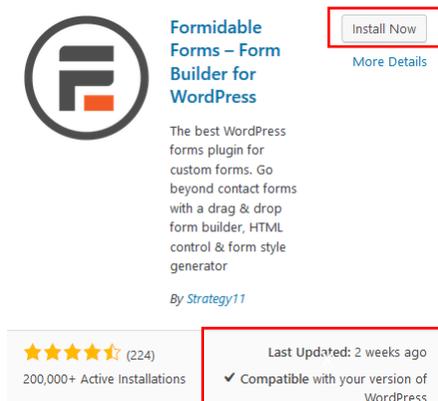


Figure 3. Formidable Forms install button and compatibility notice

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**).

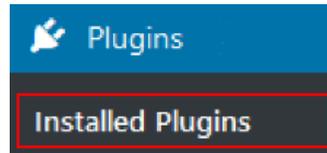


Figure 4. Installed Plugins selection

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

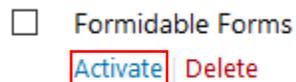


Figure 5. Activate Formidable Forms

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)**.



Figure 6. Build a Form selection

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

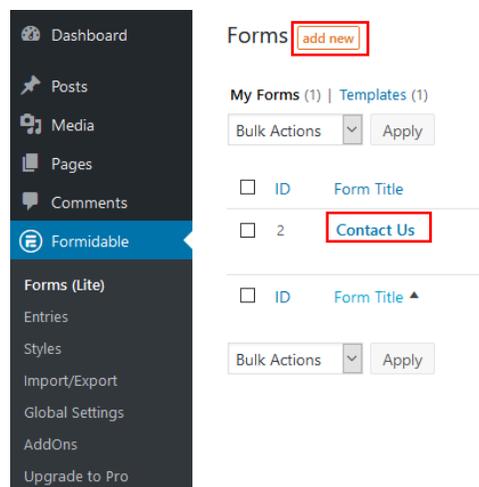


Figure 7. Add new form button and Contact Us template

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**).

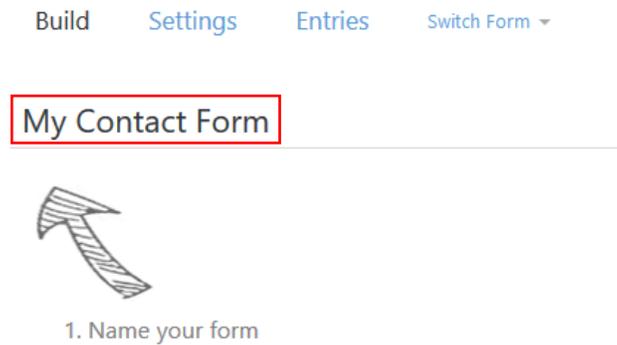


Figure 8. Form name box

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

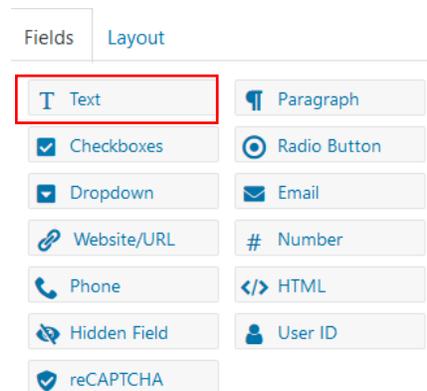


Figure 9. Fields menu with draggable text field

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

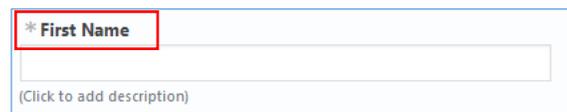


Figure 10. Field label area

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**):

My Contact Form

* **First Name**

* **Last Name**

(Click to add description)

Figure 11. Two text fields in contact form

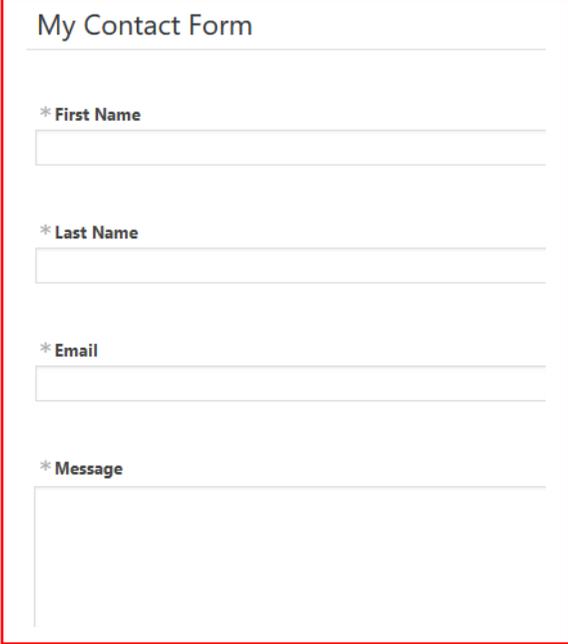
8. Drag the **Email** field from the fields menu and place it under the Last Name field. Leave Email as the field label (**Figure 12**).

Fields | Layout

<input type="text"/>	<input type="text"/>
<input checked="" type="checkbox"/> Checkboxes	<input type="radio"/> Radio Button
<input checked="" type="checkbox"/> Dropdown	<input checked="" type="checkbox"/> Email
<input type="text"/>	<input type="text"/>

Figure 12. Email field

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**):



The image shows a contact form titled "My Contact Form". It contains four required fields, each with an asterisk and a label: "* First Name", "* Last Name", "* Email", and "* Message". Each label is followed by a horizontal input field. The "Message" field is a larger text area. The entire form is enclosed in a red rectangular border.

Figure 13. Contact form with fields

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



Figure 15. Create button

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**).

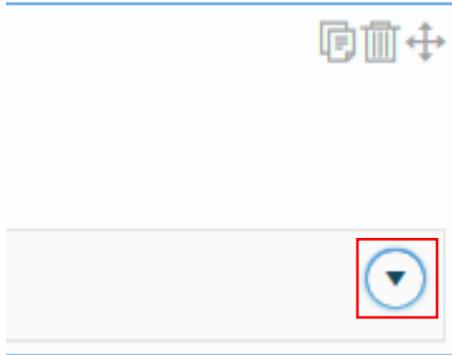


Figure 15. Field settings

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

pixels wide characters maximum

Figure 16. Field size box with width and maximum characters setting

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**).

pixels wide rows high

Figure 16. Paragraph field size settings

5. Click the **Update** button to save your form (**Figure 18**).



Figure 17. Update button to save form

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**).

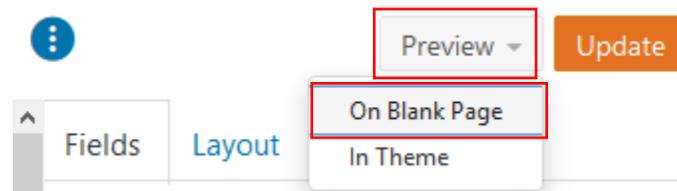


Figure 19. Preview button and On Blank Page selection

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**):



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**).

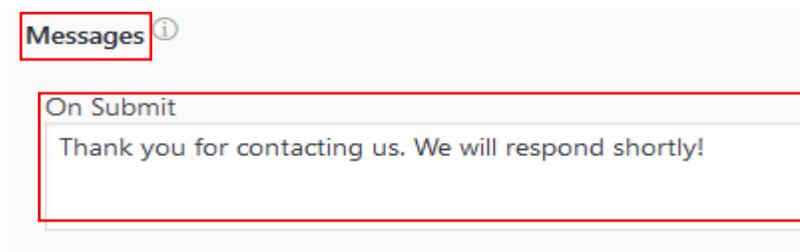


Figure 19. On Submit message box

Emailing the Form

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

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

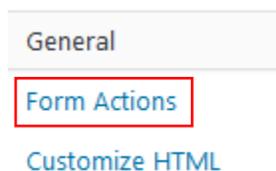


Figure 20. Form Actions in Settings window

2. Click the **down arrow** on the right side of the **Email Notification** setting (**Figure 23**).

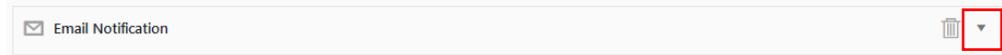


Figure 21. Down arrow on Email Notification setting

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.

A screenshot of the 'Email Notification' configuration form. The form has a title bar with a mail icon and the text 'Email Notification', and a trash icon and an upward-pointing arrow on the right. Below the title bar are several input fields: 'Label' (containing 'Email Notification'), 'To' (containing 'your_email_address@dot.com' and highlighted in yellow), 'From' (containing '[sitename] <[admin_email]>'), and 'Subject' (empty). To the right of the 'To' field are 'CC' and 'BCC' buttons. Below the 'From' field is a 'Reply To' button. At the bottom is a 'Message' text area containing '[default-message]'. A red box highlights the 'To' field.

Figure 22. Email recipient field and Subject box

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**).

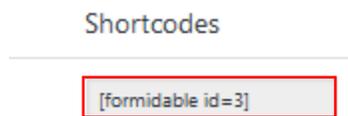


Figure 23. Formidable shortcode

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

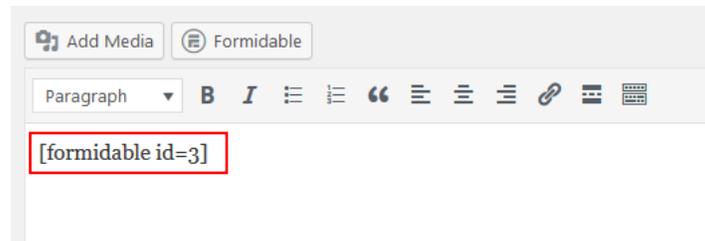
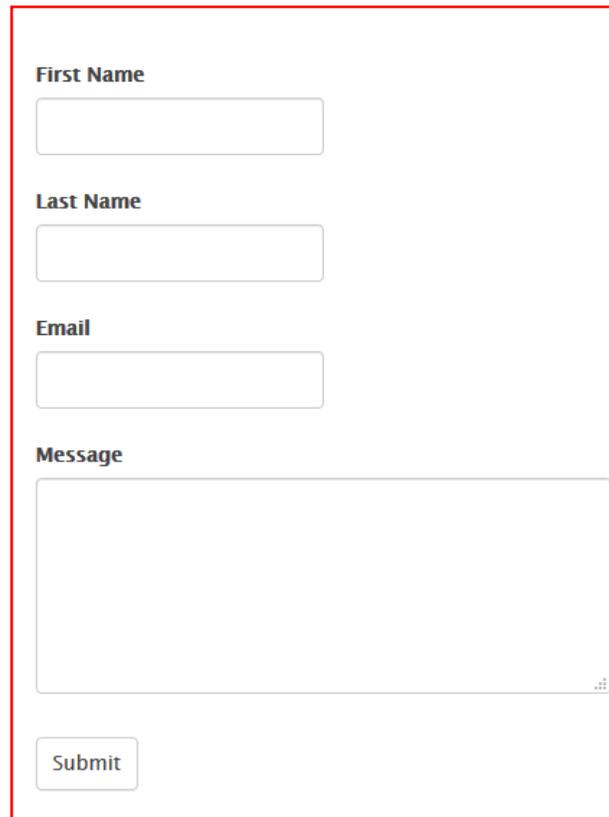


Figure 24. Form shortcode in WordPress page

3. Click **Update**, then **Preview Changes** to see what your form will look like online. Your form should look like this (**Figure 27**):



The image shows a contact form with the following fields: First Name, Last Name, Email, and Message. The Message field is a large text area with a small icon in the bottom right corner. A Submit button is located at the bottom left of the form.

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)**.

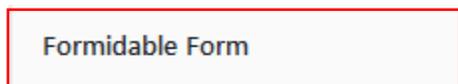
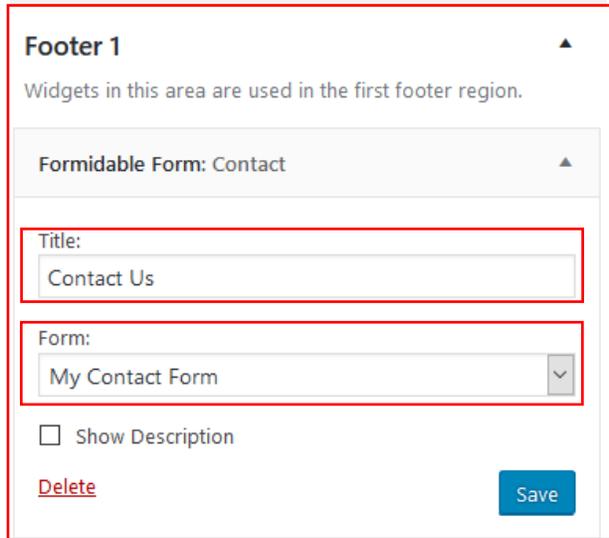


Figure 26. Formidable Form widget

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**).



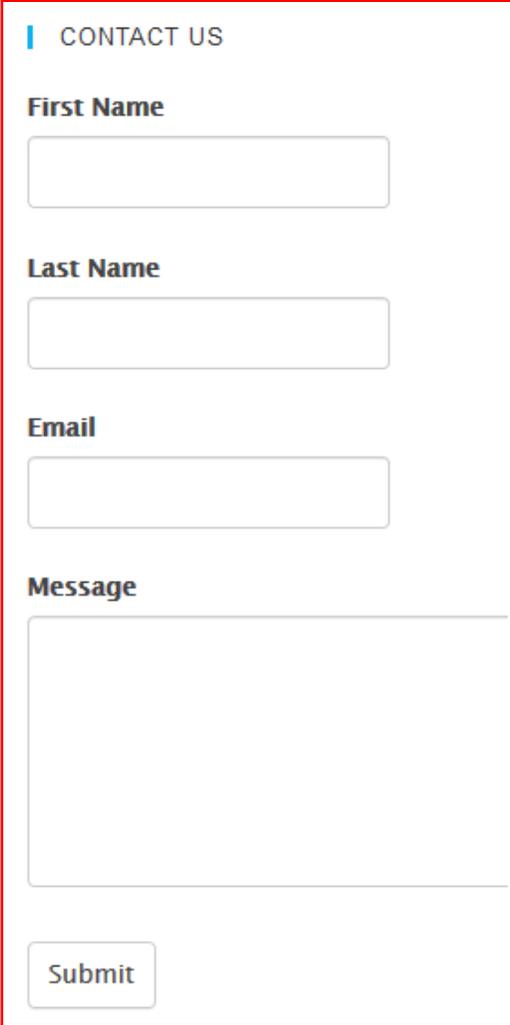
The screenshot shows a configuration window for a widget in a footer region. The window is titled "Footer 1" and contains the text "Widgets in this area are used in the first footer region." Below this, the widget is identified as "Formidable Form: Contact". The configuration fields are as follows:

- Title:** A text input field containing "Contact Us".
- Form:** A dropdown menu with "My Contact Form" selected.
- Show Description
- [Delete](#) (text link)
- [Save](#) (blue button)

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**).



The image shows a contact form widget with a red border. At the top left, there is a blue vertical bar followed by the text "CONTACT US". Below this, the form contains four input fields: "First Name", "Last Name", "Email", and "Message". Each field is a simple rectangular box with a thin border. At the bottom of the form is a "Submit" button, which is a rounded rectangle with a thin border and the text "Submit" inside.

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**).



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.
View	Delete			
ID	First Name	Last Name	Email	Message

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**).

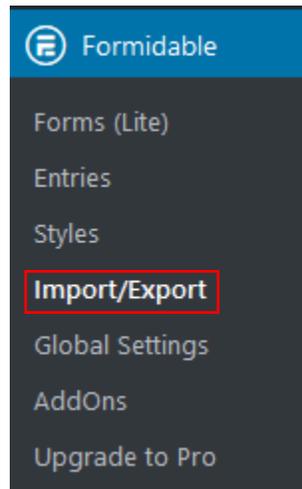


Figure 31. Import/Export selection

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**).

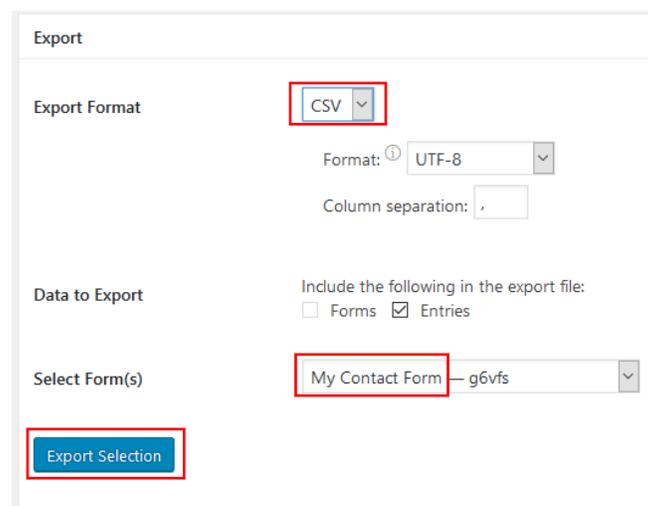


Figure 32. Export menu

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:

1. Visit **www.formidableforms.com**.
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:

1. Visit **www.formidableforms.com**.
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**).

Business Hours	
Days of the Week	Hours of Operation
<i>Monday</i>	9:00 AM - 5:00 PM MST
<i>Tuesday</i>	9:00 AM - 5:00 PM MST
<i>Wednesday</i>	9:00 AM - 5:00 PM MST
<i>Thursday</i>	9:00 AM - 5:00 PM MST
<i>Friday</i>	9:00 AM - 5:00 PM MST
Note: Support is not available on weekends or during major U.S. holidays	

Figure 33. Days and hours of support

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