

Webinar Summary: Simple Form Builder Overview & Instructions

Introduction & Purpose

- Marni introduced the Simple Form Builder, explaining its purpose as a streamlined alternative to the Advanced Form Builder, focusing on automatic mapping and ease of use.
- The tool is built on Survey JS with custom code from akoyaGO, supporting drag-and-drop design and PDF export.

Key Features & Differences

- No manual mapping required; all fields are pre-mapped and pre-formatted based on CRM data types.
- Supports custom fields on request, constituent, and contact tables; mapping to other tables requires Advanced Form Builder.
- Unmapped fields (miscellaneous section) are available for essays, yes/no questions, file uploads, and signatures.
- Limitations include inability to change input format for mapped fields and lack of support for dynamic matrix rows.

Step-by-Step Instructions

Starting a New Form

- Create a new opportunity and click "New Phase" to launch Simple Form Builder.
- Name the phase, select phase type, and save to enable the form editor tab.

Adding Fields

- Drag fields from the left sidebar (mapped fields under "Request," unmapped fields at the top) onto the form canvas.
- Use the search box to find specific fields.

Configuring Field Properties

- Click a question to edit its properties: change question name, add description, set visibility, and adjust layout.
- Mapping details are read-only but visible for verification.
- For lookup fields, you can change which field is used for lookup (e.g., tax ID vs. constituent name).

Setting Logic & Validation

- Use the logic tab to set visibility or required conditions (e.g., make a field required if another field equals "Yes").
- Validation rules can be set to display error, warning, or informational messages.

Previewing the Form

- Use the preview tab to see how the form appears on different devices and orientations.
- The logic tab shows all logic rules in one place for easy review.

Layout Adjustments

- Questions can be placed side-by-side by unchecking "Display question in a new line" in the layout tab.
- Form properties (click outside any question) allow you to set survey width mode (static or responsive), add a logo, and adjust page settings.

Special Field Types

- Signature pad: Add from unmapped fields; appears on the PDF.
- File upload: Also unmapped; files are attached to the request and appear with the PDF.
- Rich text editor: For essay questions, supports formatting but is unmapped.
- Matrix (multiple text boxes): Set fixed rows and columns; dynamic rows not supported yet.

Saving & Converting Forms

- Once a form is built in Simple Form Builder, you can convert it to Advanced Form Builder if needed, but this action is irreversible.
- Duplicating opportunities retains the form builder type used in the original.

Best Practices & Recommendations

- Start all forms in Simple Form Builder and only convert to Advanced if you need features like child record mapping or custom entity lookups.
- Test forms thoroughly, but expect reduced testing time due to automatic mapping.
- Use the preview and logic tabs to validate form behavior before publishing.

Additional Notes

- Adding new mapped fields to CRM will make them available in Simple Form Builder after publishing and refreshing.
- Images and logos can be added, but some limitations exist for PDF rendering, especially with Excel files.
- Simple Form Builder will be the default for future reviewer forms.