Form (Forms)

Overview

The **Forms** module in VirtuBox Business allows users to create and manage customized forms by organizing them into pages and adding different types of questions.

The form creation process follows a structured workflow:

Create Form → Add Page → Add Questions → Publish Changes Using Make Live

> **Important:** Whenever any changes are made to an existing form, users must click the **Make Live** button to ensure that the latest changes are reflected in the live form.

Accessing the Forms Module

To access the Forms module:

1. Log in to the **VirtuBox Business** backend.
2. Navigate to the **Modules -> Forms** module.
3. The Forms page displays a list of available forms.
4. Click **Add New Form** to create a new form.

The Forms page also provides the following options:

- **Add New Form:** Create a new form.
- **Form Responses:** View submitted form responses.
- **Form Products:** Manage product associations with forms.

Form Creation Workflow

Creating a form involves the following steps:

1. Create a new form.
2. Add one or more pages to the form.
3. Add questions to each page.
4. Configure the question types and settings.
5. Publish the changes using the **Make Live** option.

Step 1: Create a New Form

To create a new form:

1. Navigate to the **Forms** module.
2. Click **Add New Form**.
3. Enter the required form details.

Form Configuration

Field	Description	Character Limit
Title	Enter the title of the form.	500
Description	Provide a description or instructions for the form.	5,000
Footer Title	Enter a title for the footer section.	500
Footer Message	Enter a message to be displayed in the footer.	5,000
Submit Button	Specify the label for the submission button.	50
Show Title	Enable or disable the display of the form title.	—

4. Configure the required fields.
5. Click **Save** to create the form.

After successfully creating the form, it will be available in the Forms list.

Step 2: Add a Page to the Form

Once the form has been created, users can organize its content into separate pages.

To add a new page:

1. Open the **Forms** module.
2. Select the form you want to configure.
3. Open the **Form Info** page.
4. Click **Add New Page**.
5. Enter the page details.

Page Configuration

Field	Description	Character Limit
Title	Enter the title of the page.	500
Description	Provide a description or instructions for the page.	5,000

6. Click **Save** to create the page.

> **Note:** Pages help organize questions into separate sections within a form.

Step 3: Add Questions to a Page

After creating a page, users can add questions to collect information from end users.

To add a new question:

1. Open the **Form Info** page.
2. Select the page where you want to add a question.
3. Click **Add New Question**.
4. Configure the question details.

Question Configuration

Field	Description
Question	Enter the question or label to be displayed to the user.
Description	Provide additional information or instructions for the question.
Page	Select the page to which the question belongs.
Required	Mark the question as mandatory or optional.

Field	Description
Type	Select the appropriate question type.
Config	Configure additional settings based on the selected question type.
Thermal Printer	Displays thermal printer compatibility information based on the selected question type.

Question Types

The **Type** field allows users to select different types of questions based on the information they want to collect.

> **Note:** The available configuration options may vary depending on the selected question type.

5. Configure the question settings.
6. Click **Save** to add the question to the selected page.

Repeat this process to add multiple questions to the form.

Step 4: Manage Form Pages and Questions

After creating pages and adding questions, users can manage the form structure from the **Form Info** page.

The Form Info page provides options to:

- Add new pages.
- Add new questions.
- Edit existing pages and questions.
- Preview the form in draft mode.
- View the form in live mode.
- Access form responses.
- Manage form response files.
- Configure form templates.
- Publish the latest changes using **Make Live**.

Step 5: Make the Form Live

The **Make Live** option is used to publish the latest form changes so that they are reflected in the live version of the form.

When to Use Make Live

Users must click **Make Live** whenever changes are made to the form, including:

- Updating the form title or description.
- Adding or editing pages.
- Adding, editing, or removing questions.
- Modifying question configurations.
- Updating other form-related settings.

Steps to Publish Changes

1. Open the required form from the **Forms** module.
2. Make the necessary changes to the form, pages, or questions.
3. Save the changes where applicable.
4. Click the **Make Live** button on the Form Info page.
5. Confirm the action if prompted.

> **Important:** Saving changes alone may not update the live version of the form. Always click **Make Live** after making changes to ensure that the updated content is reflected in the live form.

Form Structure

The form follows a hierarchical structure:

- **Form**
  - Form Details
  - Page 1
    - Question 1
    - Question 2
    - Question 3
  - Page 2
    - Question 1

        - Question 2
    - Additional Pages and Questions

This structure allows users to organize form content efficiently and create a clear experience for end users.

Important Notes

- A form must be created before pages can be added.
- Pages must be created before questions can be assigned to them.
- Questions can be configured using different question types.
- Changes made to a form, its pages, or its questions must be published using **Make Live**.
- Always verify the live form after publishing changes to ensure that the updated content is displayed correctly.

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