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DMX336	Add a Web Form
	Follow this process to learn how to create a new Web Form.
Order of Steps	**Tasks**
Step 1	Log into **DocuMatix.**
Step 2	Click on "**Web Forms**" located in the menu on the hand left side of the page.
Step 3	Click the green "**Add New**" button.
Step 4	Complete the "**Details**" page.
Note: Anything in italics is an optional field as noted below. Some of the fields will auto populate from Account Settings.	
	• Web Form name
	• Description (optional)
	• Response notification email address (optional)
	• Folder
	• Link web form to a Marketing Path OR Link web form to an email campaign
Note: To setup an email, refer to the "Creating an Email from a Template" procedural document	
	• Never expire web form
4.1	If the "**Never expire survey**" option is not enabled, the following options will display:
	• Expire notification email address
	• Expire on date
	• Expire by response
	• Expire type
	o Expire message
	o Expire redirected URL
	• Expire message
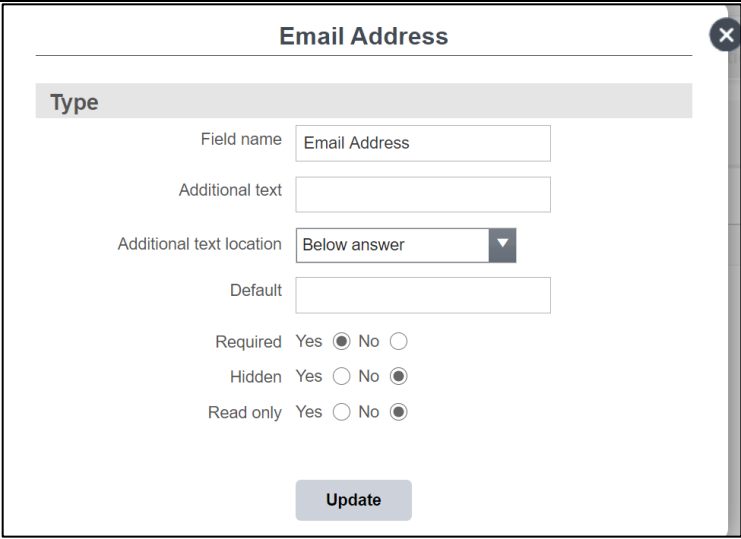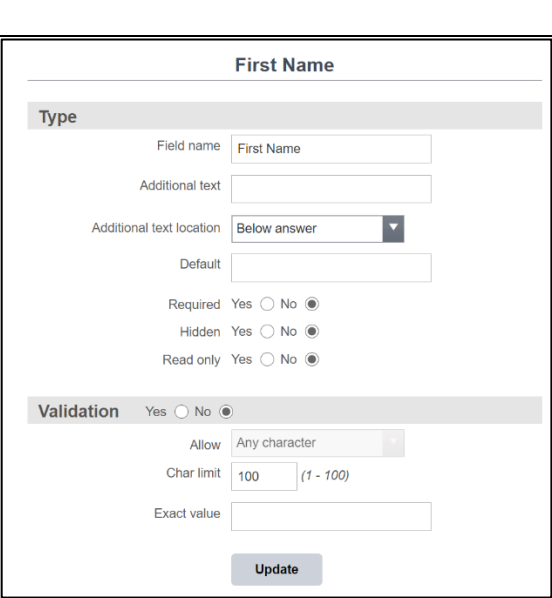
Step 5	Click "**Next**"
Step 6	Complete the "**Greeting**" page
	• Greeting Type
	o None
	o Text
	o Graphic
	o Combination (text/graphic)
	o Combination (graphic/text)
	• Greeting Text
	• Analytics type (optional)
	o None
	o Google Analytics
	o Custom Java script
	o Custom HTML

Step 7	Click "**Next**"
Step 8	Complete the "**Contact Info**" page
Step 9	Click the drop-down arrow and click on a field.
Step 10	Click "**Add**" to select the field
Step 11	Click the pencil icon next to each added field to **edit** to make desired changes
	• Field name
	Additional text-includes additional information which may be added to the field (for example: (Last, First, MI)

	• Additional text location
	o Below Answer
	o Right of field name
	o Below field name
	• Default-includes information that will be added to the form by default. (For example, in a web form email, this could be a default email address that would receive any information gathered in the web form).
Note: The default field is required to process a web form, when the field is marked as hidden. If a field is not marked as hidden, the default field is optional.	
	• Require – Yes or No
	• Hidden – Yes or No (to hide the selected field)
	• Read only – Yes or No
	• Validation – Yes or No

	Email Address ✕ **Type** Field name: Email Address Additional text: [ ] Additional text location: Below answer ▼ Default: [ ] Required Yes ⦿ No ○ Hidden Yes ○ No ⦿ Read only Yes ○ No ⦿ **Update**

11.1	If Validation is set to Yes, the following settings will be enabled for updating:
	• Allow
	o Any character
	o Alpha/numeric
	o Alpha only
	o Numeric only
	o Exact value
	• Character limit
	• Exact Value

	First Name **Type** Field name: First Name Additional text: [ ] Additional text location: Below answer ▼ Default: [ ] Required Yes ○ No ⦿ Hidden Yes ○ No ⦿ Read only Yes ○ No ⦿ **Validation** Yes ○ No ⦿ Allow: Any character ▼ Char limit: 100 *(1 - 100)* Exact value: [ ] **Update**

11.2	Click **Update**
11.3	If a field was added in error, simply click the **X** next to it in the **Contact Information** box. Click **Yes** to the confirmation message.

Step 12	Click "**Next**" once all necessary fields are selected and their settings have been made
Step 13	Complete the "**Confirmation**" page
	• Confirmation type
	o On screen message
	o Redirect URL
	• Autoresponder email
	• Analytics type (optional)
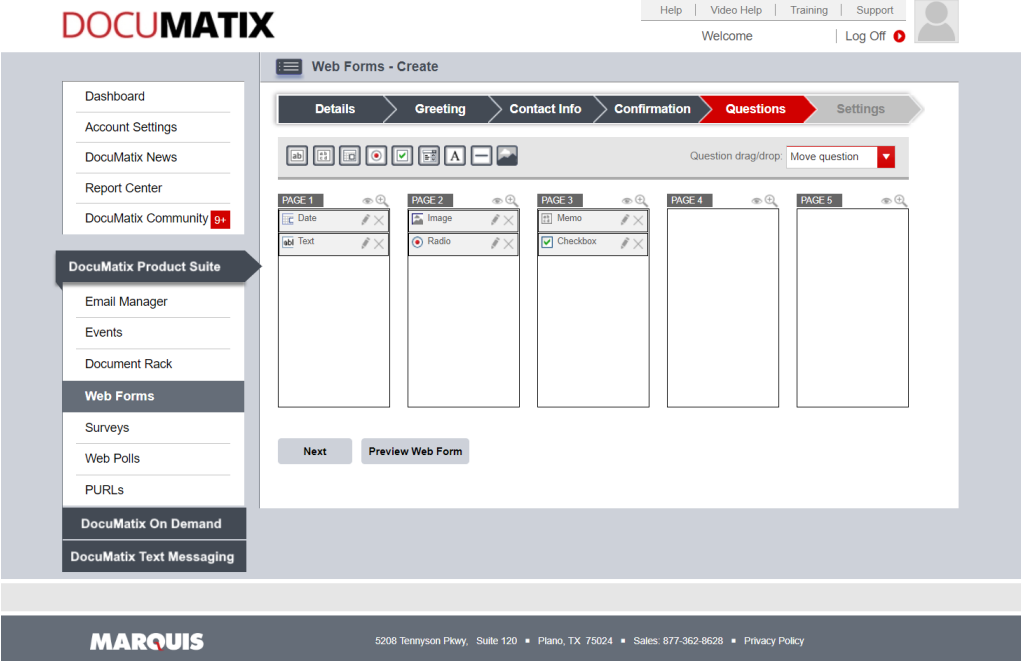
| Step 14	Click "**Next**"
Step 15	Complete the "**Questions**" page

Step 16	Select an icon that corresponds to the function desired by "Click, Drag, and Drop" the icon into the desired page of the web form being created
	• [ab] Text
	• Memo
	• Date
	• Radio
	• Checkbox
	• Drop down
	• [A] Custom Text
	• Line
	• Image
Step 17	Click "**Next**"
Step 18	Complete the "**Settings**" page
	• Choose Logo
	• Show logo
	• Logo alignment
	• Submit button alignment
	• Web Form width
	• Next button text
	• Previous page button text
	• Last page button text
	• Color selections
	• Footer (optional)
	• Show page progress on web form
	• Show page 1 questions with contact information

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	• Save my current settings as default values

Step 19	Click "**Finish**"
Step 20	Click on the Web Form and click "**Publish**"
Step 21	Click "**Yes**"
Step 22	A **Survey Link** page will appear with all of the link information regarding the web form.
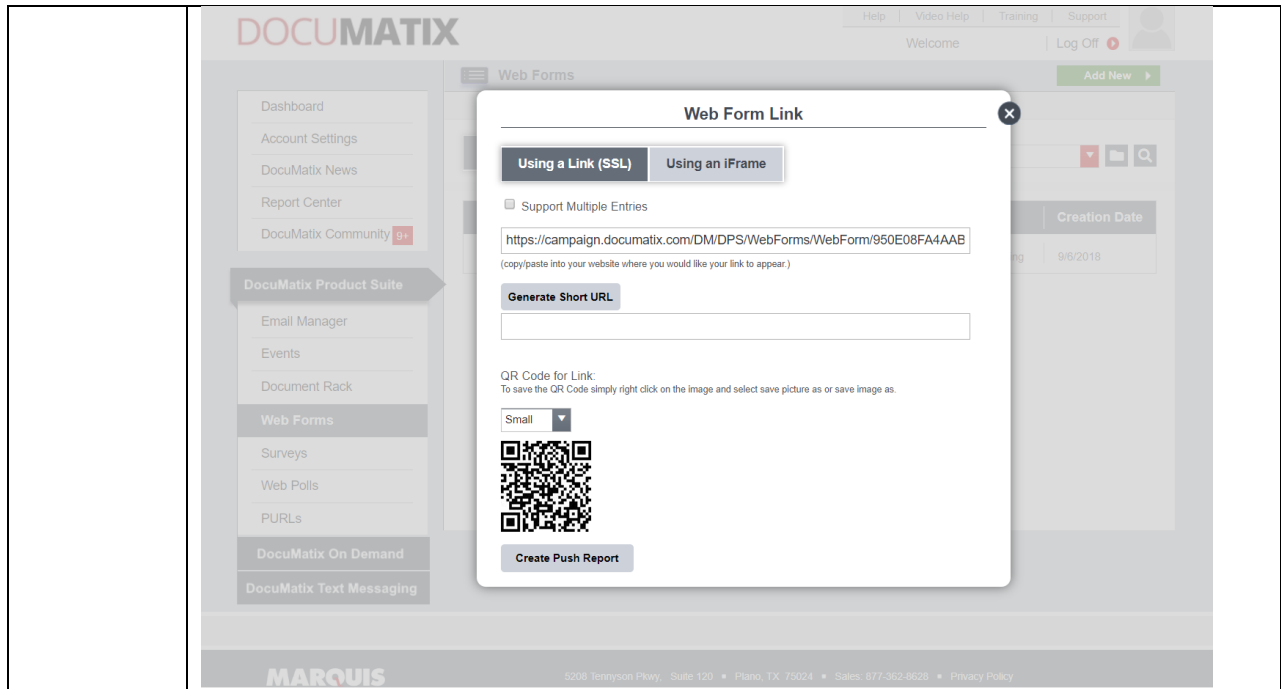
	If desired, there is an option to create a **Push Report** for the survey. Move to the next step if that is something you would like to setup.
Step 23	Click "**Create Push Report**"
Step 24	Complete "**Add Push Report**" page
	• Report Type
	• Web Forms
	• Push report name
	• Email addresses
	• Push report start date
	• Push report expire date
	• Frequency
	• Days of the week
	• Time of the day
Step 25	Click "**Submit**"