2020

AbcSubmit User Manual

HOW TO USE ABCSUBMIT FORM BUILDER

Table of Contents

How to read this manual

Depending on what you want to achieve, here are some guidelines regarding the order of the chapters you need to read:

I want to …	Steps:
Create an account on AbcSubmit	• Read Create and setup your user account, and don't forget to setup your profile preferences and your email notification preferences.
Create, **embed** and **collect data with a form**	• Design your form • Publish form • Access form results
Setup payments for my form	• After you designed your form, • Collect payments with your form
Automate a process in my company via a form workflow	• Configure Company • Design a form (if you don't have one) • Setup Workflows automation (for forms you want to automate)
Connect my form to **other third-party platforms** like Google Drive, MailChimp, or Zapier	• Design your form • Integrate your form with third party platforms
Read more about a specific form field	• Read desired field documentation from chapters 2.3.x

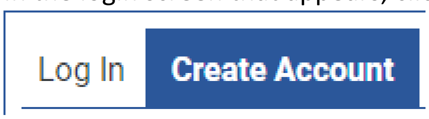
Try searching the Table of contents first, where you can easily find a specific item you are searching.

1. Create and setup your user account

Welcome. In this chapter you will learn how to properly create and setup your account on AbcSubmit.com platform.

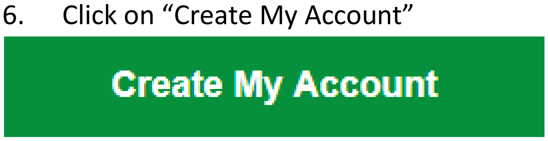
1. Navigate to Abcsubmit.com builder:
   https://www.abcsubmit.com/edit/

2. In the login screen that appears, click the tab “Create Account”:



3. Click on “Sign up with Email” (recommended method, and you will see why a little bit later)

4. Fill in your user details:
   a. First name and Last name (If your account represents a company, fill in the First name the name of the company, and in the Last name the text “Company”)
   b. Email address (Choose your email address carefully, here all your form results messages will arrive by default).
   c. Password (the password must contain at least 6 characters, but **we recommend you to setup a stronger password which contains in the same time: lowercase letters, uppercase letters, digits, and at least 1-2 special characters like &, {, $, etc.**)
   d. Confirm password (input the same password again, in order to be sure you wrote it correctly).
5. Read or Terms of Use and our Privacy Policy (and select the agreement checkbox).
6. Click on “Create My Account”



[FAQ] When I navigate to AbcSubmit.com builder, no login screen appears.

Short answer: This means that you previously created an account, and that your credentials were saved in your browser.

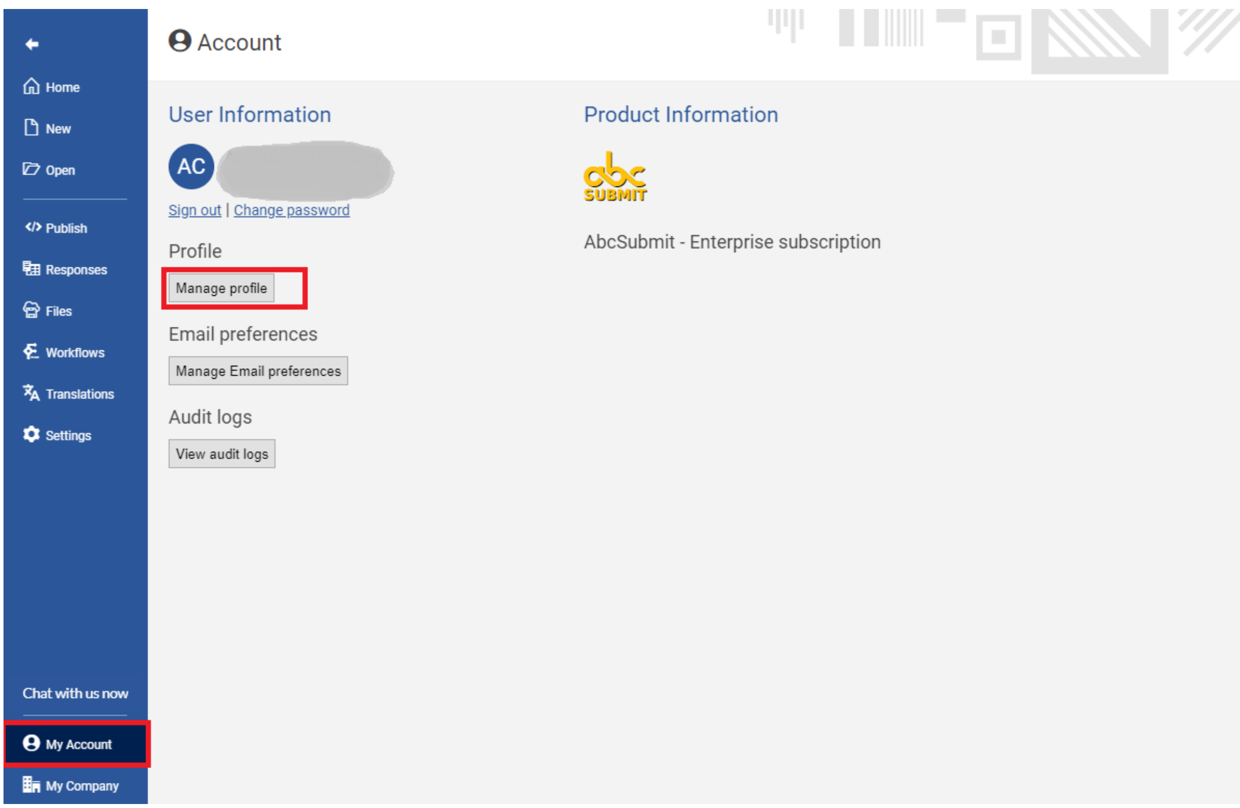
Technical answer: Each time you log in, we generate an access key called JWT (JavaScript Web Token). Further requests to our website are accompanied by this JWT key. Your JWT key is saved in AbcSubmit website data (LocalStorage). To completely remove all your authentication details, clear the Website Data associated with AbcSubmit from your browser.

[FAQ] Why is ***"Sign up with Email"*** *the* ***recommended method****?*

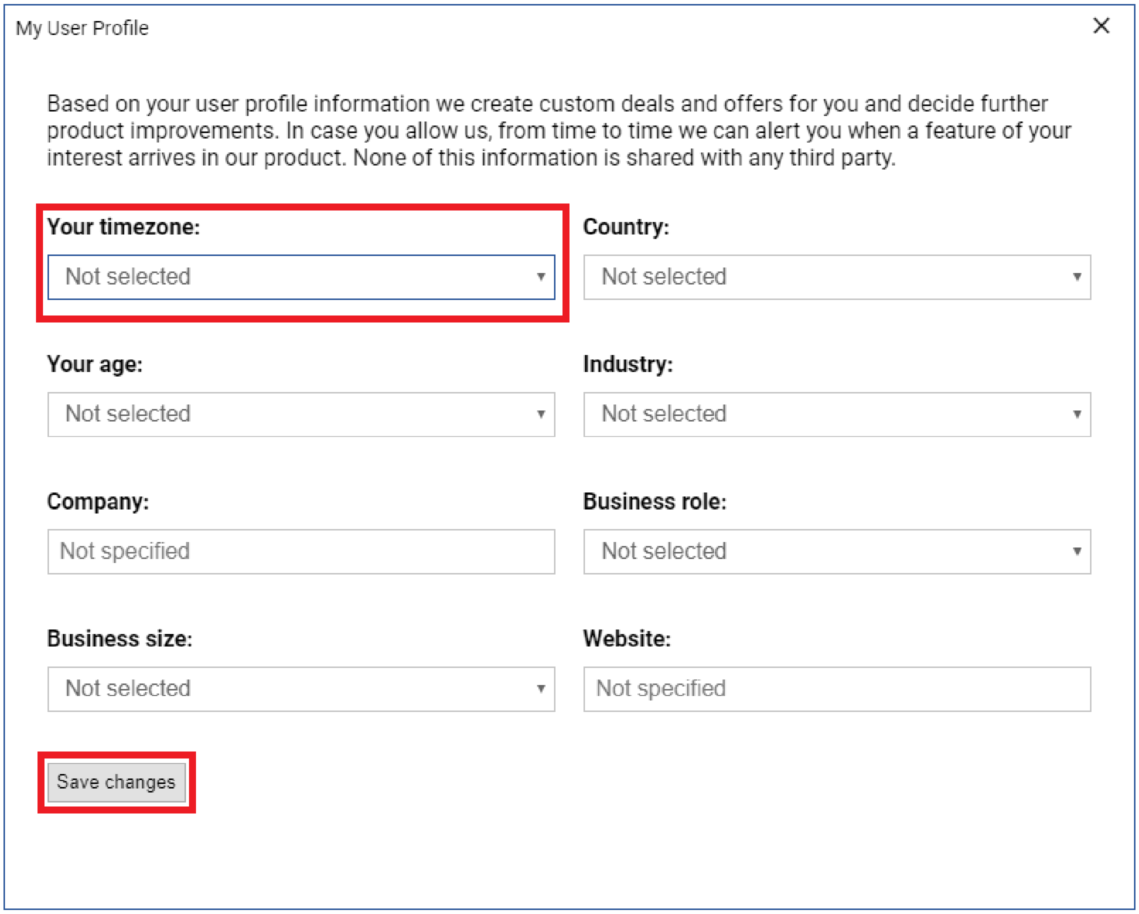
- **Some integrations** (like Zapier for example) will **require an account with password**.
- **You won't be able to reset your account password by yourself** (because when you login with a social media platform, your password is stored on their database).
- **For security reasons** (which are outside the scope of this document), beware that ***It's not good to keep all your eggs in a single basket***.

1.1. Setup your profile preferences (Timezone)

According to your Timezone, all dates from emails and exported form results will be displayed properly.



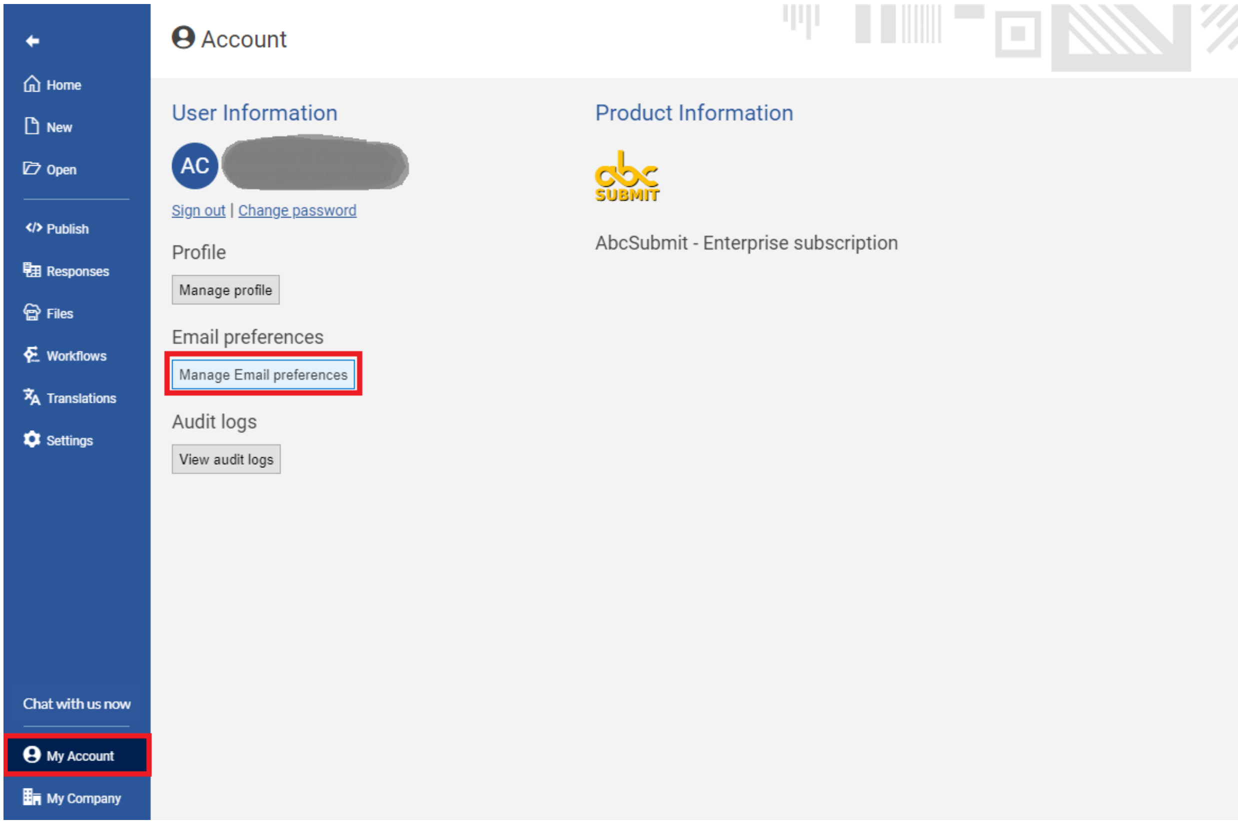
1. Under your **My Account** section, **click button** "**Manage Profile**"
2. **Your user profile preferences window appears**:



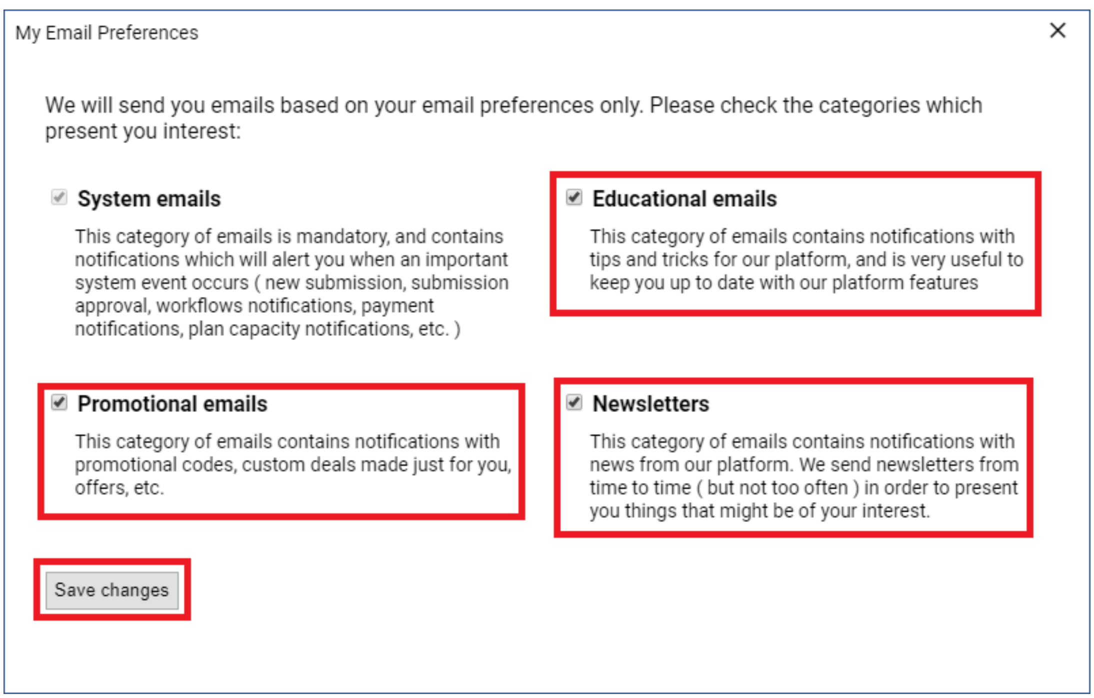
3. **Select your Timezone**
4. **Optional step**: Please tell us more about yourself, in order to tailor your experience on AbcSubmit better according to your needs
5. **Click** on "**Save changes**" button.

1.2. **Setup** your **email notifications** preferences

1. **Under** your "**My Account**" section, **click button** "**Manage Email preferences**":



2. **Email preferences window appears**:



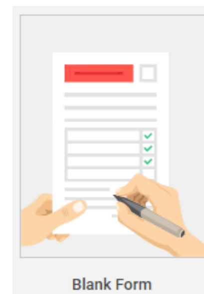
3. **Select the type of emails you want to receive form AbcSubmit**
4. **Click** on button "**Save changes**"

2. Designing your form

After you've successfully created an account, it's time to create your first form on AbcSubmit.com form builder.

2.1. Design from scratch, or use a form template?

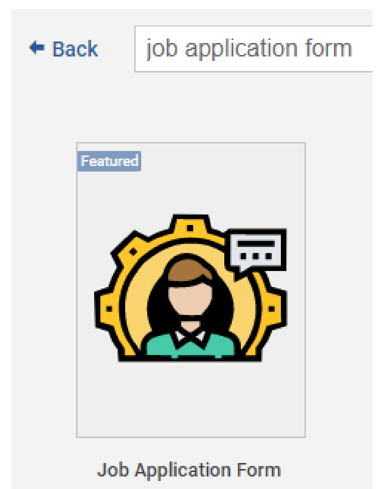
2.1.1. Designing your form from scratch



1. Navigate to New section
2. Click on "**Blank Form**".

Form editing screen will appear, and you are ready to start adding fields to your form.

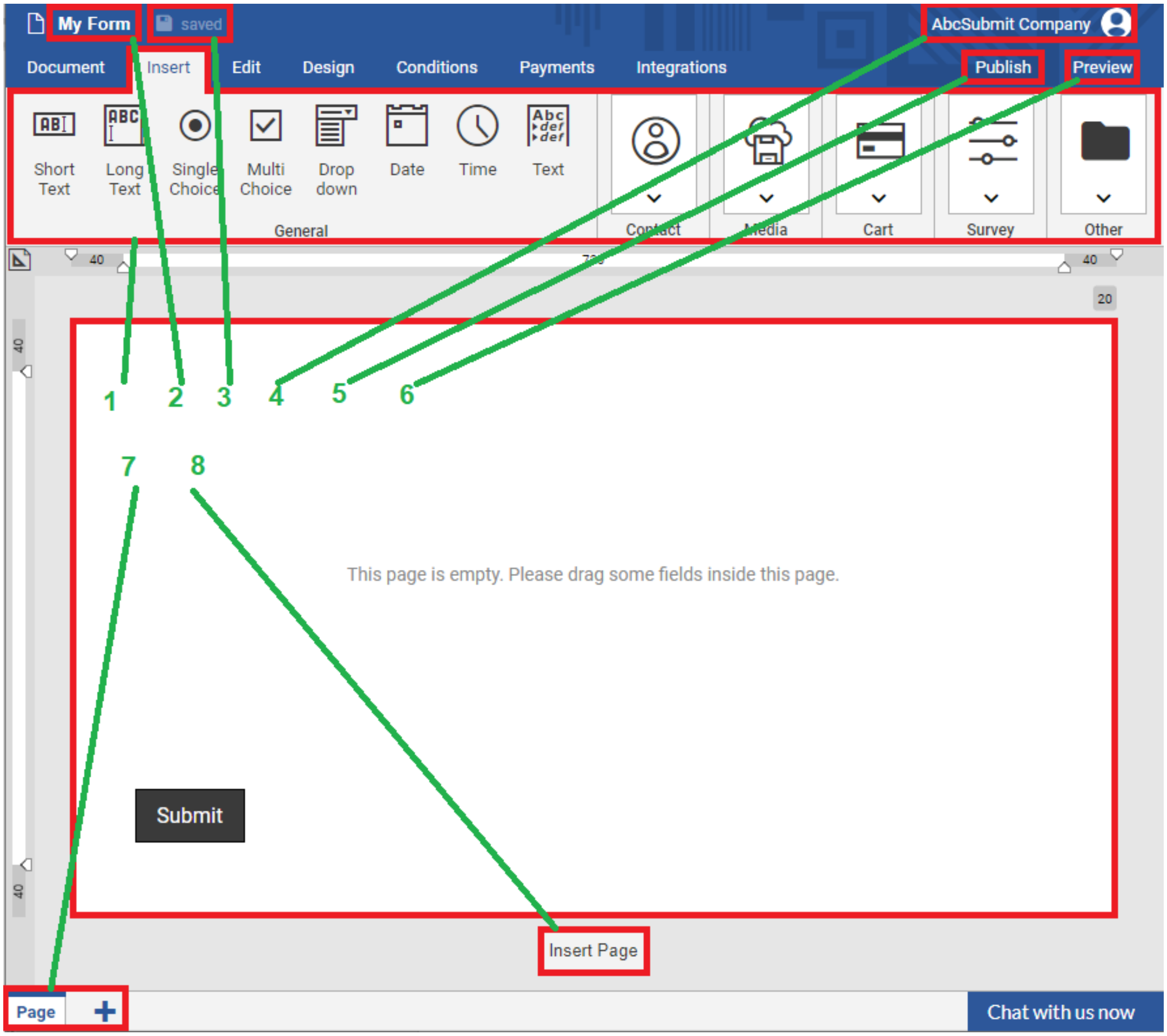
2.1.2. Designing your form from a template



1. Navigate to New section
2. Search for a form template you wish to create (by typing what you're searching in the field "Search for form templates").
3. Click on the found result.

Form editing screen will appear, and you are ready to modify or add fields in your newly created form.

2.2. Form editing

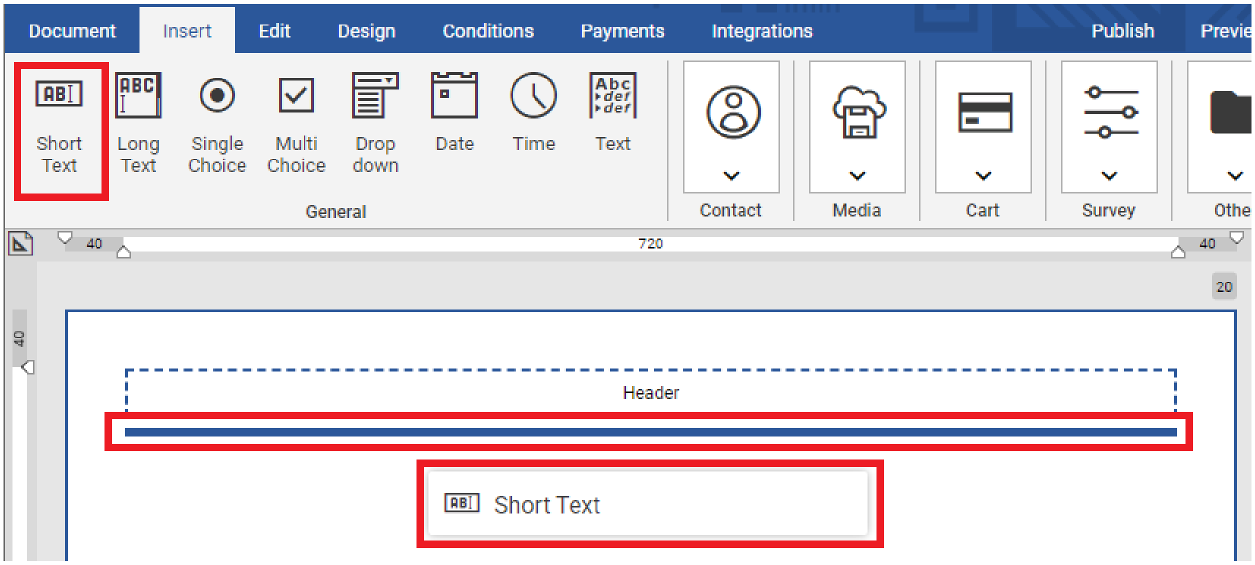


Form editing screen presentation:

(1) List of form fields;
(2) Form name;
(3) Save status;
(4) Current user button;
(5) Publish button;
(6) Preview button;
(7) Page list toolbar;
(8) Insert page button;

2.2.1. Insert a new field in form by using the Drag and Drop method

Drag a field from list of form fields, and drop it in current form page:



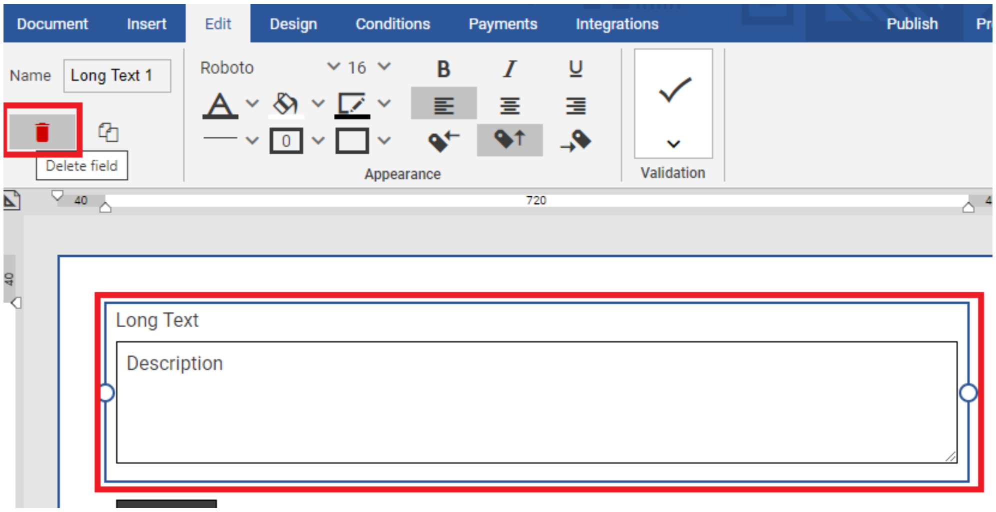
During the drag and drop phase, you have the opportunity to insert dragged field in Header or Footer.

While you drag a form field, a drop indicator (blue thick line) is visible inside the page under your mouse pointer, allowing you to see exactly where the field will be inserted.

2.2.2. Insert a new field in form by clicking on a field from form fields list

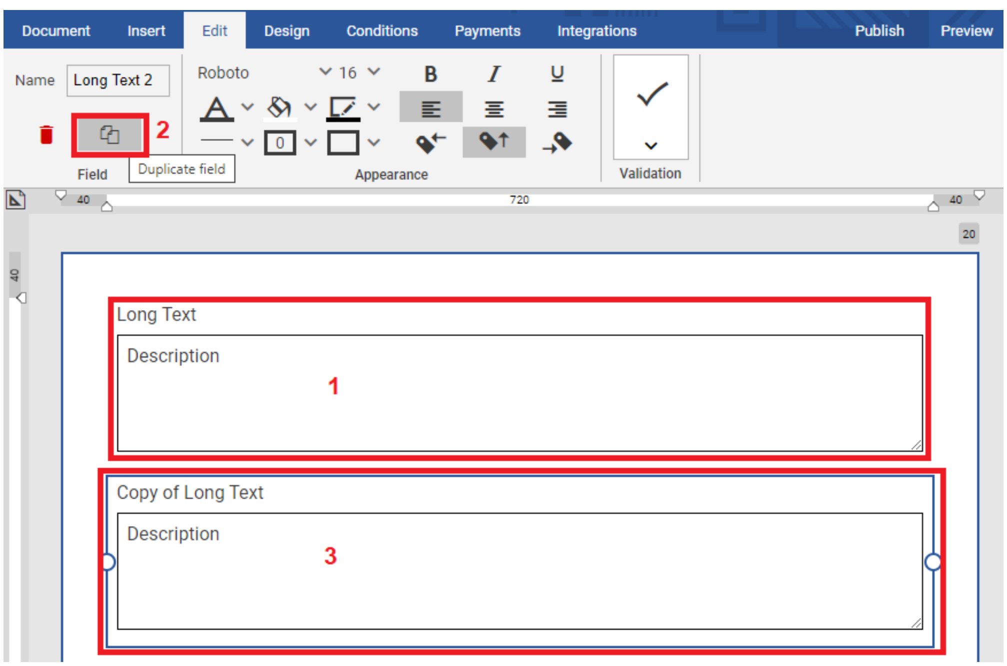
An alternate method of inserting a new form field, is by clicking on a field from the form fields list. The field will be inserted inside current active form page.

2.2.3. **Remove** (delete) **a** form **field**



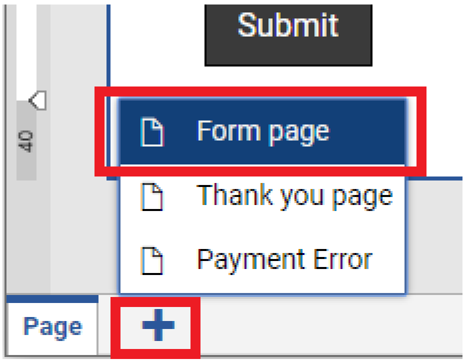
1. Click on desired field you wish to remove
2. Click on “Delete field” button

2.2.4. **Duplicate** (clone) **a** form **field**



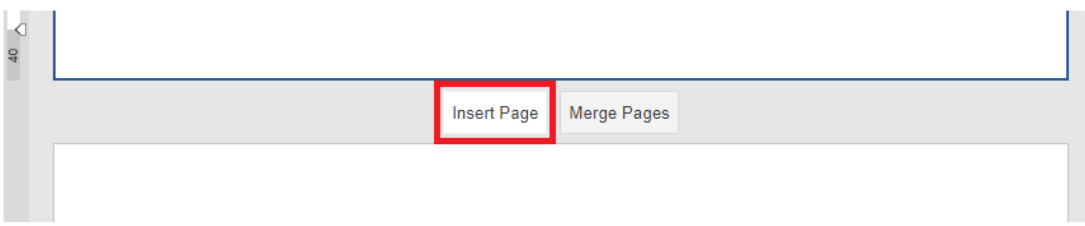
1. Click on desired field you wish to duplicate
2. Click on “Duplicate field” button

2.2.5. Insert a new form page



1. Click on the sign from the page list toolbar
2. Click on “Form page” menu option that appears

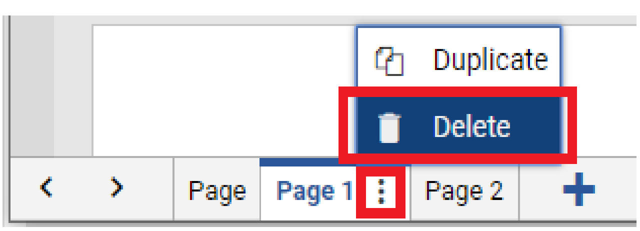
Note: An alternate method of inserting a new form page is by clicking on the “Insert Page” button which appears right after the page you wish to insert a new one:



2.2.6. Remove a form page

Note: This operation is available only when your form contains more than a single page.

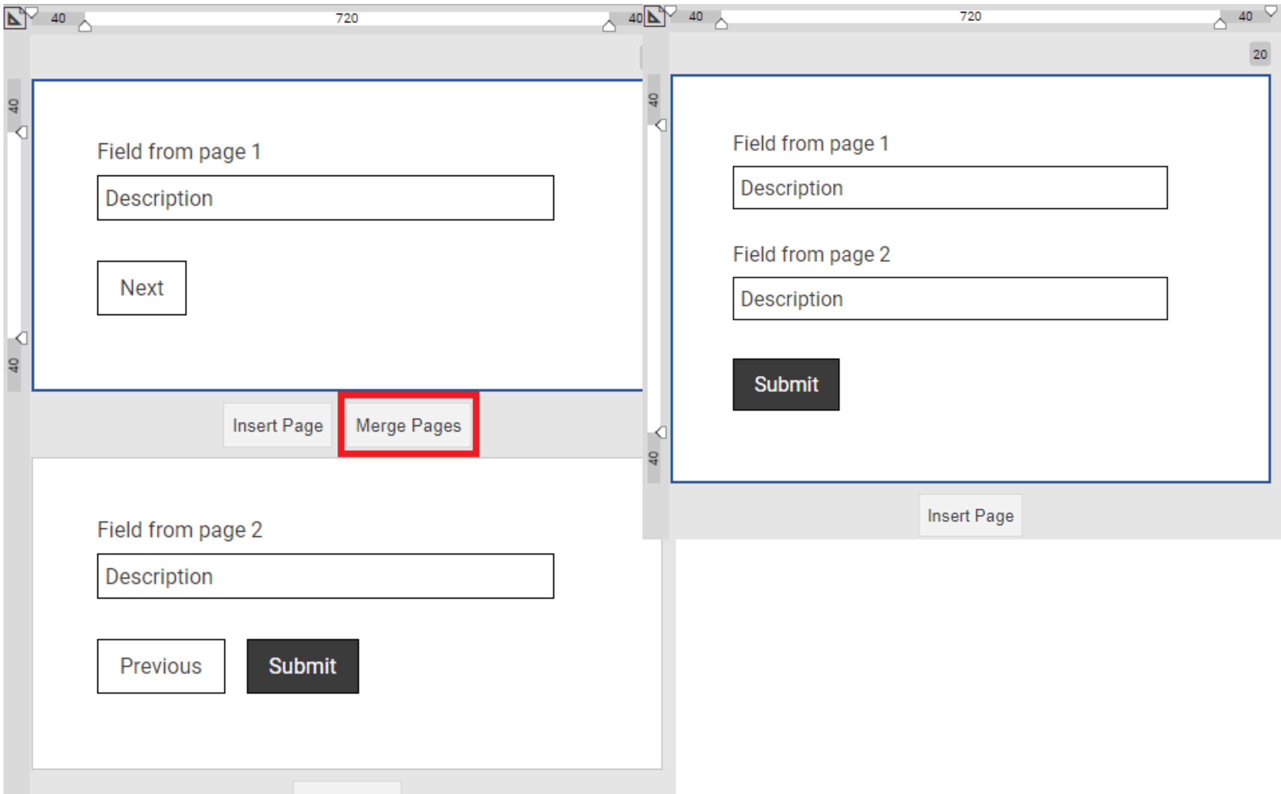
Warning: When you delete a form page, you delete the page together with all it’s contained fields. If your form already gathered responses, all collected data of deleted fields will be lost.



1. Click on sign on the desired page you want to delete -- from the page list toolbar
2. Click on “Delete” menu option that appears

2.2.7. Merge the contents of two form pages into a single form page

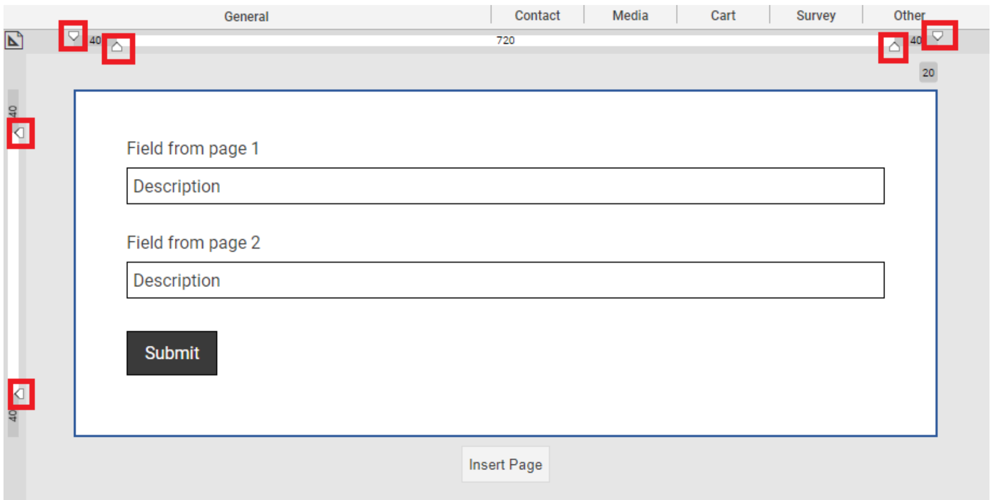
Click on the button “Merge Pages” located between the pages you wish to merge



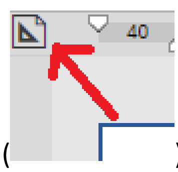
Before merge **After merge**

2.2.8. Modify the size / margins / padding of your form page

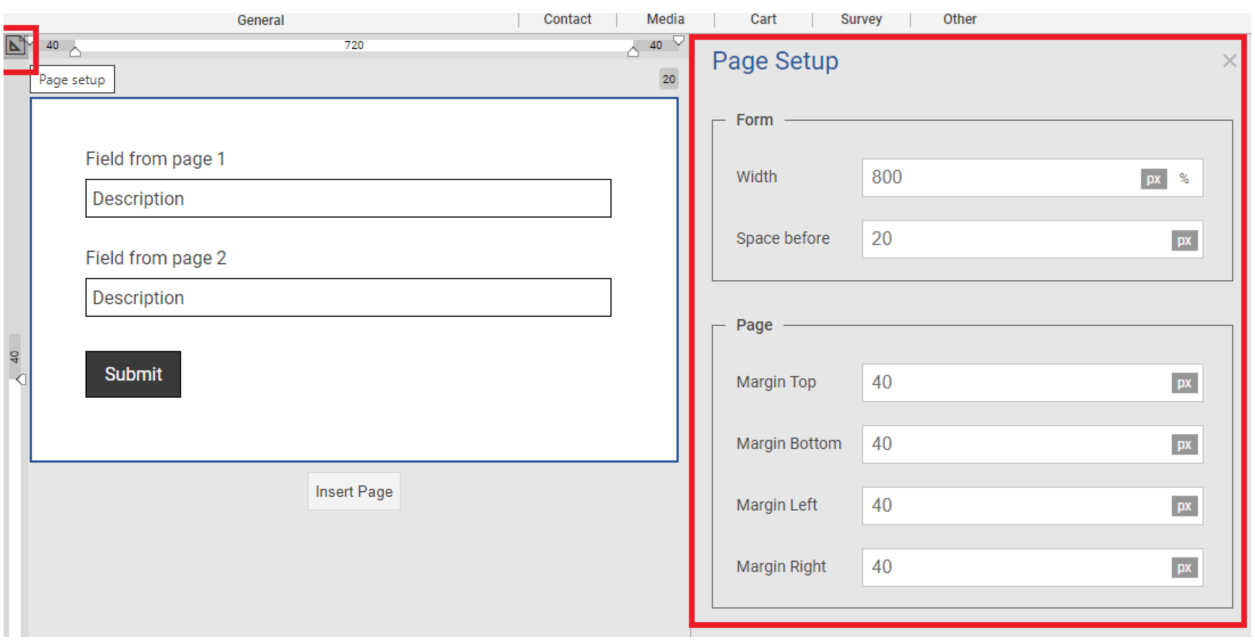
*A) **Drag the ruler handles** in order to quick-adjust the width of your form pages*, or their padding:



OR

*B) **Open "Page Setup"*** (

), and adjust all the form dimensions from there.



*[FAQ] What is a **"Thank you page"**, and how to use it?*

A "**Thank you page**" is a special form page, which **is displayed only after the user clicks on submit form button**.

On a Thank you page you can add only fields which are not fillable (images, text, videos, etc.).

There can be only one Thank you page per form.

In order to find out how to add a Thank you page, see chapter 2.2.5.

*[FAQ] What is a **"Payment error" page**, and how to use it?*

A "Payment error page" is a special form page, which is displayed if and only if:

- You enabled payments on your form
- A payment error occurs

On a **Payment error page** you can add only fields which are not fillable (images, text, videos, etc.).

There can be only one Payment error page per form.

In order to find out how to add a Payment error page, see chapter 2.2.5.

*[FAQ] How can I **add a header and footer** to all the pages of my form?*

There is no special button which enables or disables the header or footer of the form.

Adding fields in header or footer is possible only by dragging a field inside the form page.

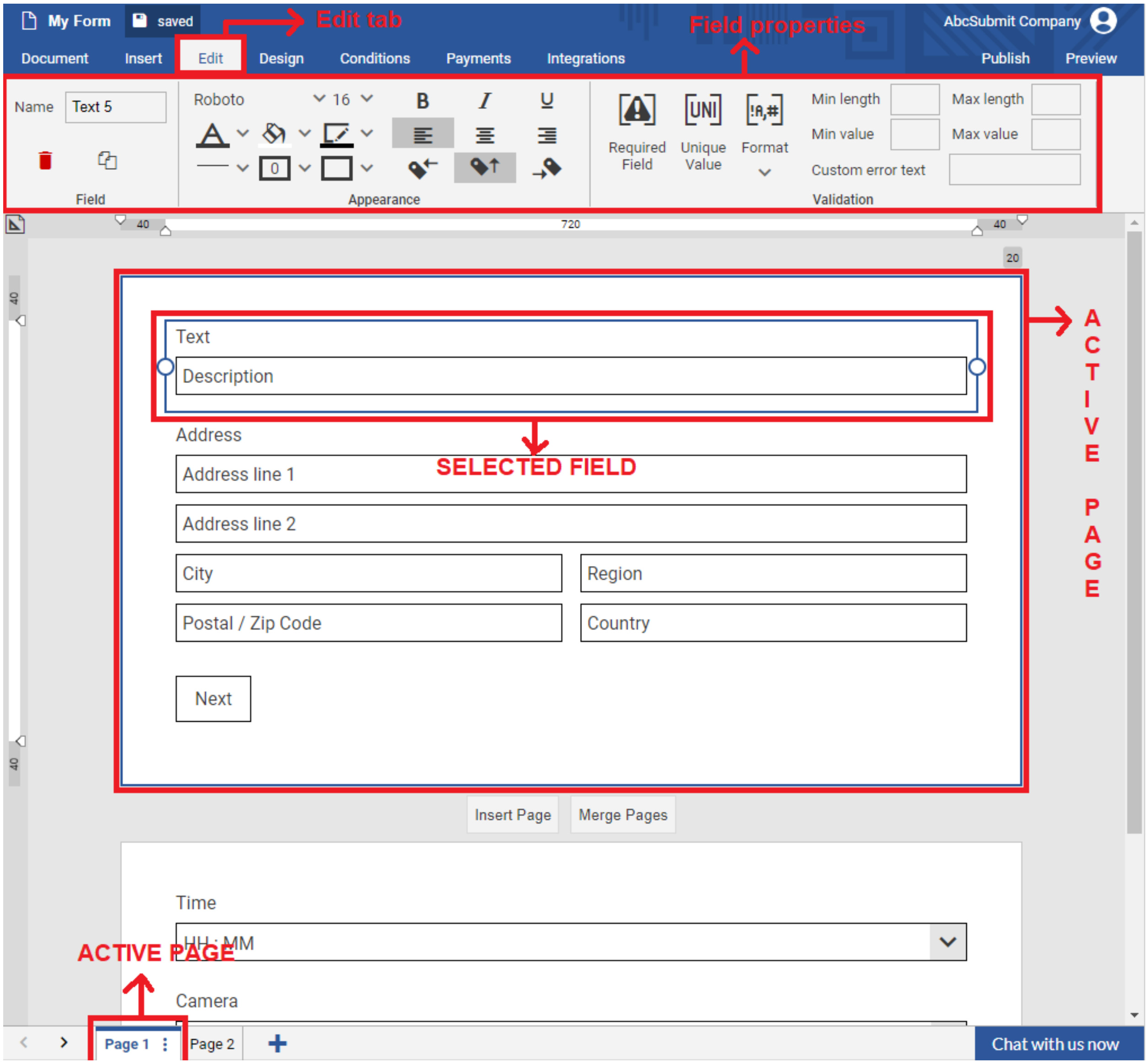
In order to insert fields in header or footer, see 2.2.1 – Insert a new field in form by using Drag and Drop method

*[FAQ] I want to **add a textbox to my header or footer, but it doesn't work**. Why?*

Form Header and Footer containers are special, and cannot contain fields which are fillable.

2.3. Edit form fields

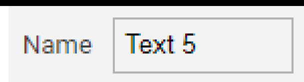
When you click on a form field, the builder interface looks like this:



- The “Edit” tab is selected
- Selected field properties are visible inside the Edit tab
- The page containing selected field is selected (Active page)
- In the bottom page navigation toolbar, the active page is displayed as selected.

You can edit only one field at a time.

Below you can find the description of all the elements located in the Field properties section of the editor

Textual description	Visual appearance in Field properties section	Comments
Field		
Field name		**Set the field name.** **Field name is used in Conditions, Workflows, Integrations and Email notifications send by the platform.** **Always set the field name when you add the field, and NEVER modify the field name on a later phase (especially after you receive form results).** **Must be unique across form (even across the name of the form pages).** **Must start with a letter** **Illegal characters**: “.”, “{“, “}”, “`”, “[“, “]”, “-“ **Sample good values**: - **Email of user** - **Date of birth** **Sample illegal values**: - **~~Email.of.user~~** (contains “.”) - **~~[Birth Date]~~** (contains “[“ and “]”, and it don’t start with a letter)
Delete field		If you click this button, **your field is deleted**
Duplicate (clone) field		If you click this button, a copy of your field is inserted below selected field
Appearance		
Used font and font size		**Sets the font and font size** of clicked selected field component (if you clicked on the field label, sets label font / font size. If you clicked on the field input, sets input font / font size)
Font style settings		Sets Bold, Italic or Underline font style of clicked selected field component

Text alignment		Sets the alignment of text (Left, Right, Center) of clicked selected field component
Text color		Sets the text color of clicked selected field component
Background color		Sets the background color of the field input
Border color		Sets the color of the border of field input
Border width		Sets the width of the border of field input
Border radius	0	Sets rounded corners of field input
Border style (pattern)		Sets the style of the line of the border of field input
Label placement		Choose **where the label of the field should be displayed**: - On top of the input - On the left side of the input - On the right side of the input
Validation		
Required field	Required Field	Click this if you want to **always require a value for this field**
Unique field	UNI Unique Value	Click this **if you want the value of the field to be always unique** (case sensitivity ignored, empty field values ignored)
Field data format	!A,# Format	Sets a **required data pattern for this field** (empty values are ignored)
Field minimum data length (chars)	Min length	**Minimum allowed field data number of characters**
Field maximum data length (chars)	Max length	**Maximum allowed field data number of characters**
Field minimum value	Min value	**Minimum value of field data**
Field maximum value	Max value	**Maximum value of field data**
Custom error text	Custom error text	Specify a custom error message that will override ALL field errors.

	For example: Comment is required, and must contain between 10 and 30 characters.

2.3.1. Short text (form field) (aka. Textbox)

Use a **Short Text** form field in order to collect from users single-line texts of various lengths.

Data represented by a Short Text field can be:

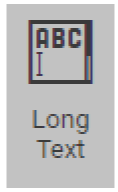
- Short user notes
- Numbers
- Any kind of text user writes in a single line
- Serial numbers
- Coupon codes
- Short comments
- Any other kind of data not described in the table below:

There are some use-cases when Short Text field is not recommended:

Are you using short text field for:	Use this form field instead	Explanation
Asking for an email address	Use Email	**Email** form field has better email address validation
Asking for a link	Use Website	**Website** form field has better data validation suitable for links
Asking for a phone number	Use Phone number	**Phone number** form field actually validates if a phone number is valid for a country, and has additional checks for phone number validation
Asking for a person name	Use Name	**Name** form field comes with special name validation support
Asking for someone address	Use Address	**Address** form field comes with special address validation support

Asking for a calendar's Date?	Use Date	**Date** form field comes with special date validation features
Asking for a specific Time?	Use Time	**Time** form field comes with special time validation features
Require a password	**Unless the product is hosted on premise, collecting passwords via forms is forbidden by our Terms of Use policy**	

2.3.2. **Long text** (form field) (aka. Textarea)



Use a Long Text form field in order to collect from users multiple-lines of text of various lengths.

Data represented by a Long Text field can be:

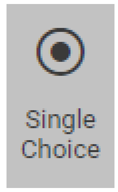
- Long user notes, where you expect multiple lines (paragraphs) of text

- Detailed comment or description of something

There are some use-cases when Long Text field is not recommended:

Are you using Long Text field for:	Use this form field instead	Explanation
Asking for a number	Use Short Text	Numbers are written on a single line
Asking for a text which should not contain multiple lines or paragraphs	Use Short Text	Short Text field does not allow multiple lines of text

2.3.3. **Single choice** (form field) (aka. Radio)



Use a Single Choice form field in order to make the users to select a single choice from a list of available choices.

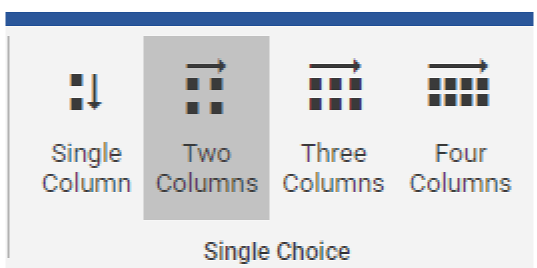
Basically, a Single Choice field can be used instead of a Dropdown, and vice-versa, with difference that the Single Choice occupies more space in form (but it's easier to choose from).

Tips and tricks:

- You can sort the choices of the Single Choice with the help of the mouse (Drag them from their left side up and down)

*[FAQ] How can I **arrange** the **choices** of a Single Choice field **on multiple columns**?*

1. Click on the Single Choice field
2. Click on the button corresponding with the number of desired columns (Two, Three, or Four):



2.3.4. Multi choice (form field) (aka. Checkbox)

Use a Multi choice form field in order to allow the users to select more than one choice from a list of choices, in the same time.

Tips and tricks:

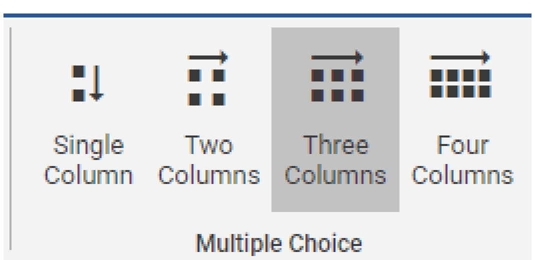
- You can sort the choices of the Multi Choice with the help of the mouse (Drag them from their left side up and down)

*2.3.4.1. Design recommendations (**avoid using these characters in choice text**)*

Because the choices of a Multi Choice field can be accessed via Conditional Logic, it is recommended to avoid using the characters: “.”, “{“, “}”, “`” in the text of the choices.

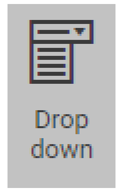
*[FAQ] How can I **arrange** the **choices** of a Multi Choice field **on multiple columns**?*

1. Click on the **Multi Choice** field
2. Click on the button corresponding with the number of desired columns (Two, Three, or Four):



*[TIP] **Check the Terms of Service field*** (click here) if you intend to make user agree with some conditions you specify (an agreement).

2.3.5. Dropdown (form field)



Use the Dropdown form field in order to make the users to select a single choice from a list of available choices.

Basically, **the Dropdown field is a perfect replacement of a Single Choice field, in case the number of choices is too big** (20 for example)

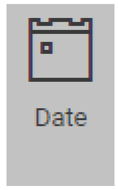
Tips and tricks:

- You can sort the choices of the dropdown with the help of the mouse (Drag them from their left side up and down)

*[FAQ] How can I create a **Dropdown with dynamic choices**?*

Use the BigData Dropdown instead.

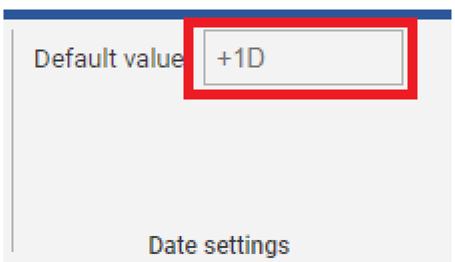
2.3.6. **Date** (form field)



Use the Date form field in order to collect calendar dates with your form, based on the date format and limitations you specify.

*[FAQ] How to **set default date** field with the date of tomorrow?*

1. Click on the Date field
2. Input value **+1D** in the default value setting of the Date field:



D stands for “Day”. Other supported units are:

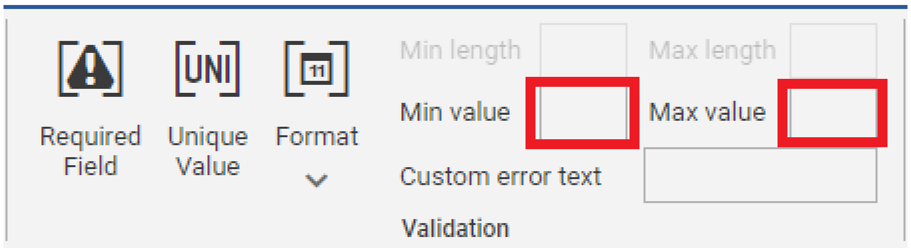
Unit	Description
D	Day
W	Week
M	Month
Y	Year

For example, if you wish the default date to be today + 2 weeks + 3 days, you can specify **+2W3D**.

The same thing goes with the dates in the past, by replacing the + sign with – sign (**-2W3D**)

[FAQ] How to ***enforce date intervals*** *of the Date field?*

1. Click on the Date field
2. Adjust the “Min value” and “Max value” settings of the Date field:



Here are some sample values which will help you to figure out how it works:

Min value	Max value	Explanation
today	**tomorrow**	Enforce date interval selection between today and tomorrow
-2W	**+1M**	Enforce date interval selection between two weeks ago and next one month
+3M15D	**+1Y**	Enforce date interval selection between 3 months and 15 days in the future and 1 year in the future.

Of course, you can limit date interval selection only in the past or only in the future, it is not mandatory to enforce both min value and max value at the same time.

Supported units are:

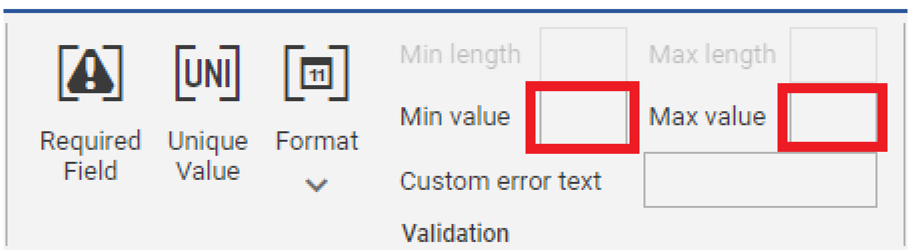
Unit	Description
D	Day
W	Week
M	Month
Y	Year

2.3.7. Time (form field)

Use the Time form field in order to allow users of your form to input hour/minute time values, based on the time format and limitations you specify.

*[FAQ] How to **enforce time interval selection** for the Time field?*

1. Click on the Time field
2. Adjust “Min value” and “Max value” of the time field:

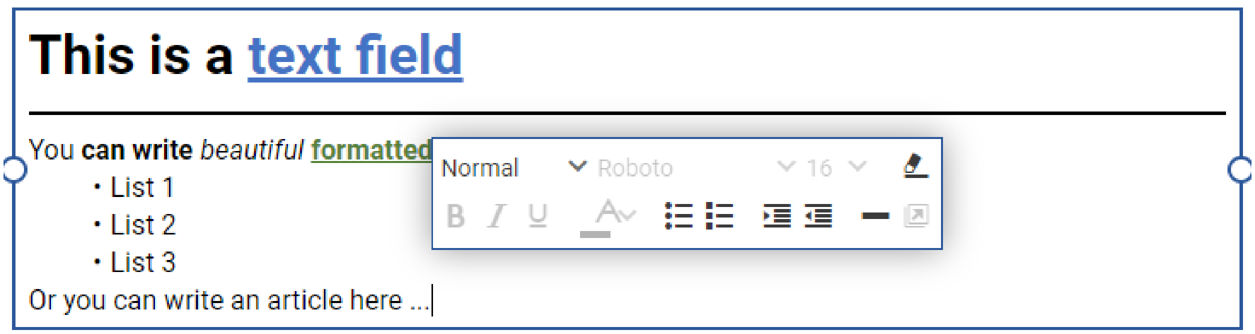


Sample values which can be used in both “Min value” and “Max value” can be:

Sample value	Description
now	Current time
+5M	Current time + 5 minutes
+2H30M	Current time + 2 hours and 30 minutes
-12H8M	Current time - 12 hours and 8 minutes

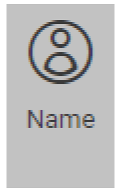
2.3.8. **Text** (form field)

Use the Text field in order to design a block of text which supports font and color formatting. Suitable for scenarios when you want to describe something, a contract, an explanation, a long note, etc.



Text field appearance during form editing phase

2.3.9. Name (form field)



Use the Name form field if you want to collect person names in your form.

There are no frequently asked questions for this field. Ask a question on our contact and support form, and we will add your answer in this manual.

2.3.10. **Signature** (form field)

Use a Signature form field if you want to collect electronic signatures of your form visitors (images representing signatures). Suitable for contracts, agreements, or any other kind of scenario where user signature is required.

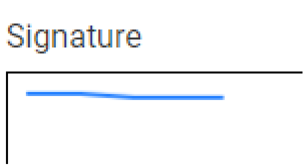
Users can sign in the Signature field by using their finger, mouse, or a phone / tablet pencil.

*[FAQ] How to **change the color and the line width** of the user signature?*

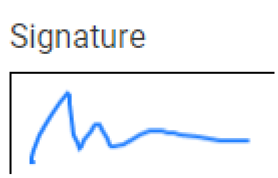
1. Click on the signature field
2. Adjust the “Pen color” and “Pen width” settings:

*[FAQ] How to **enforce stronger signatures**?*

A straight line can be considered a signature, but it’s very improbable that it’s a valid signature:



Simple complexity signature



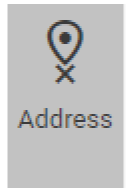
Medium complexity signature

High complexity signature

In order to modify the required complexity of the signature field, follow these steps:

1. Click on the signature field
2. Adjust the “Required complexity” setting:

2.3.11. **Address** (form field)



Use an Address form field in order to collect geographical addresses (street, number, city, town, country, address line, etc.)

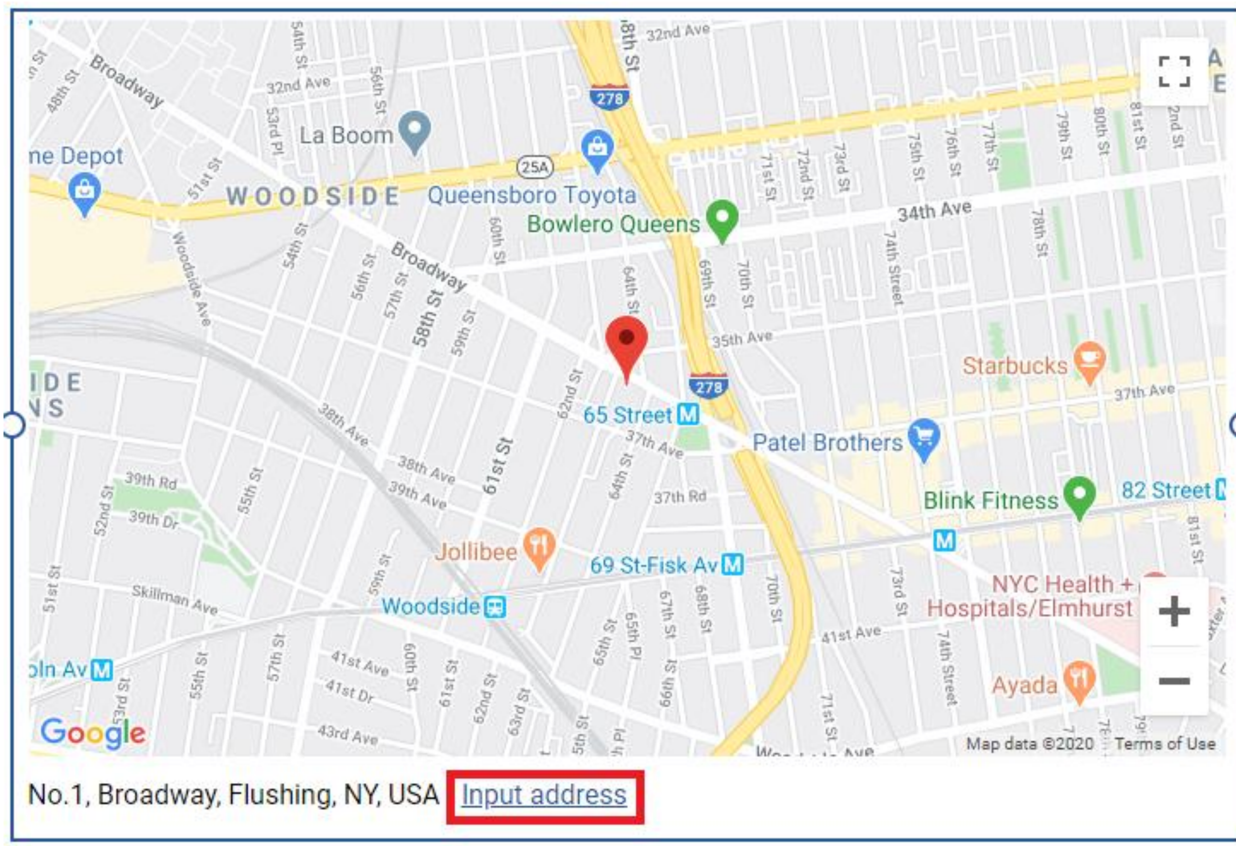
There are no frequently asked questions for this field. Ask a question on our contact and support form, and we will add your answer in this manual.

2.3.12. Map (form field)

In a Map form field you can display a Google Map centered (with a marker) to an address you specify. Useful for giving directions straight on Google Maps to your users. Useful when you want to show the location of an event, organization, building, shop, etc.

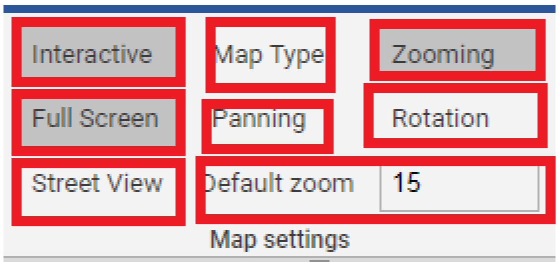
*[FAQ] How to **change the address of the map**?*

1. Click on the address field
2. Click on “Input address”



*[FAQ] How to **customize the map appearance**?*

1. Click on the map field
2. Play with the address settings:



2.3.13. **Email** (form field)

Use an email form field in order to **collect properly formatted email addresses** with your form.

*[FAQ] **Does the email field checks if an email exists for real**?*

No, the email field checks to see only if the provided email address is written using correct format. It does not make network checks to see if the address really exists.

2.3.14. Phone number (form field)

Use a phone number form field in order to **collect VALID phone numbers** with your form.

[FAQ] Does the phone field checks if the phone number is valid for real?

> **Yes**. We can validate for sure the following things about a collected phone number:
>
> - Length of the phone number is valid (depending on selected country and network)
>
> - First digits of the phone number are valid (it knows all the prefixes of all the phone operators in the world)

2.3.15. **Website** (form field)

Use a Website form field in order to collect properly formatted links to websites or website pages with your form.

*[FAQ] **Does the website field checks if the website link exists for real**?*

No. The website field only checks if the provided link is properly formatted

2.3.16. **File upload** (form field)

Use a file upload form field in order to collect files (documents, videos, pictures, archives, etc.) with the help of your form.

Users can upload either a single file, or multiple files at once.

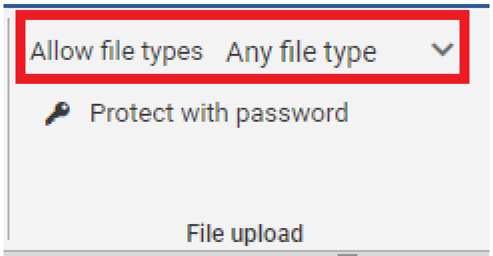
*[FAQ] **What kind of files can I receive** with the file upload field?*

You can receive the following type of files:

File type	Allowed file extensions
Pictures	"tiff", "jpeg", "jpg", "bmp", "raw", "pdf", "tga", "ani", "ico", "png", "svg", "oxps", "gif"
Documents	"doc", "docx", "odt", "pdf", "rtf", "tex", "wks", "wps", "wpd", "txt", "xls", "xlsx", "ppt", "pptx"
Video	"avi", "flv", "wmv", "mov", "mp4", "mkv", "mpg", "mp4", "mpeg"
Audio	"wav", "mp3", "wma", "vorbis", "aac", "flac"
Archives	"zip", "rar", "arj", "tar", "gz"
Text files	"txt", "ini"
Any file type	**Any file which does not have extension**: 'exe', 'dll', 'com', 'bat', 'cmd', 'sh', 'bash', 'php', 'js', 'msi', 'vb', 'vbs', 'ws', 'wsf', 'scf', 'scr', 'pif', 'lnk'

In order to change the allowed file type that the File upload accepts:

1. Click on the File upload field
2. Change the setting “Allow file types”:



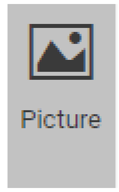
[FAQ] ***Are uploaded files scanned with an antivirus*** *software?*

No. Uploaded files are not scanned with an anti virus software. Please scan all collected files with an antivirus before you open them.

[FAQ] What is the ***maximum file size a user can upload*** *via a File upload field?*

Files larger than 128 MB might cause problems while uploading.

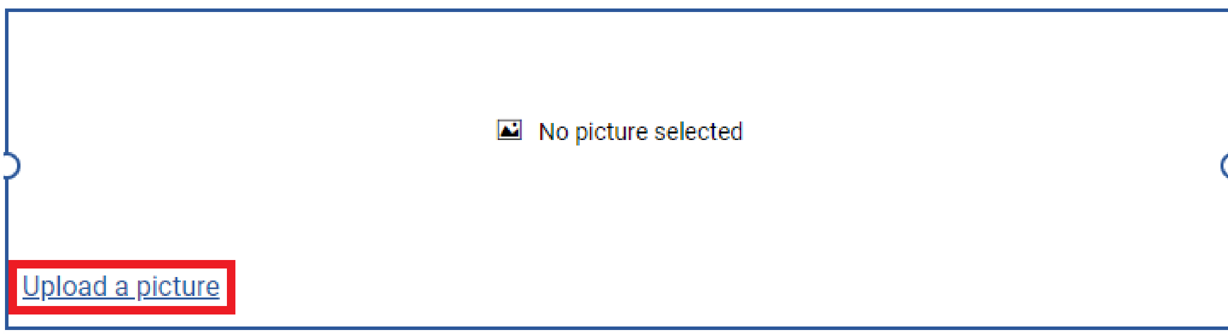
2.3.17. **Picture** (form field)



The picture field displays an image in your form. Useful if you want to show your logo in header, or if you simply want to display a picture in one of your form pages.

*[FAQ] **How can I change (add) a picture**?*

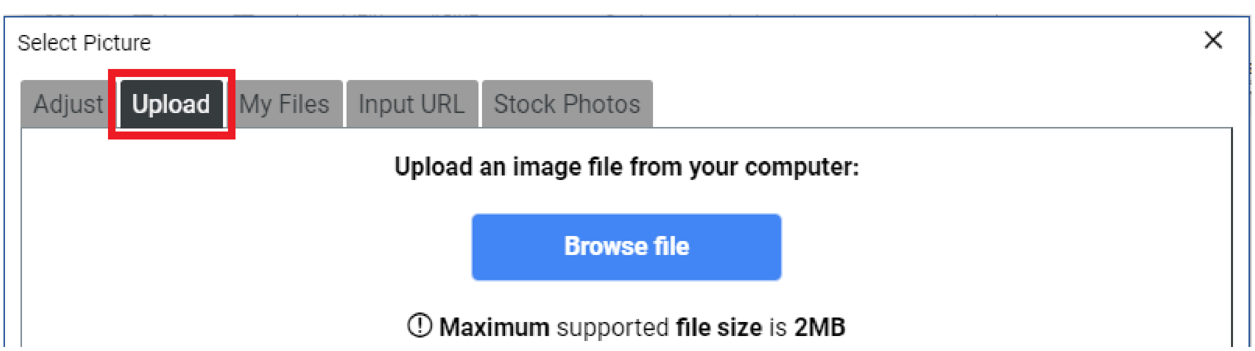
1. Click on the picture field
2. Click on “Upload a picture” (or “Select a picture”)



A window will appear. Depending on how you want to upload / select the picture, the following options are available:

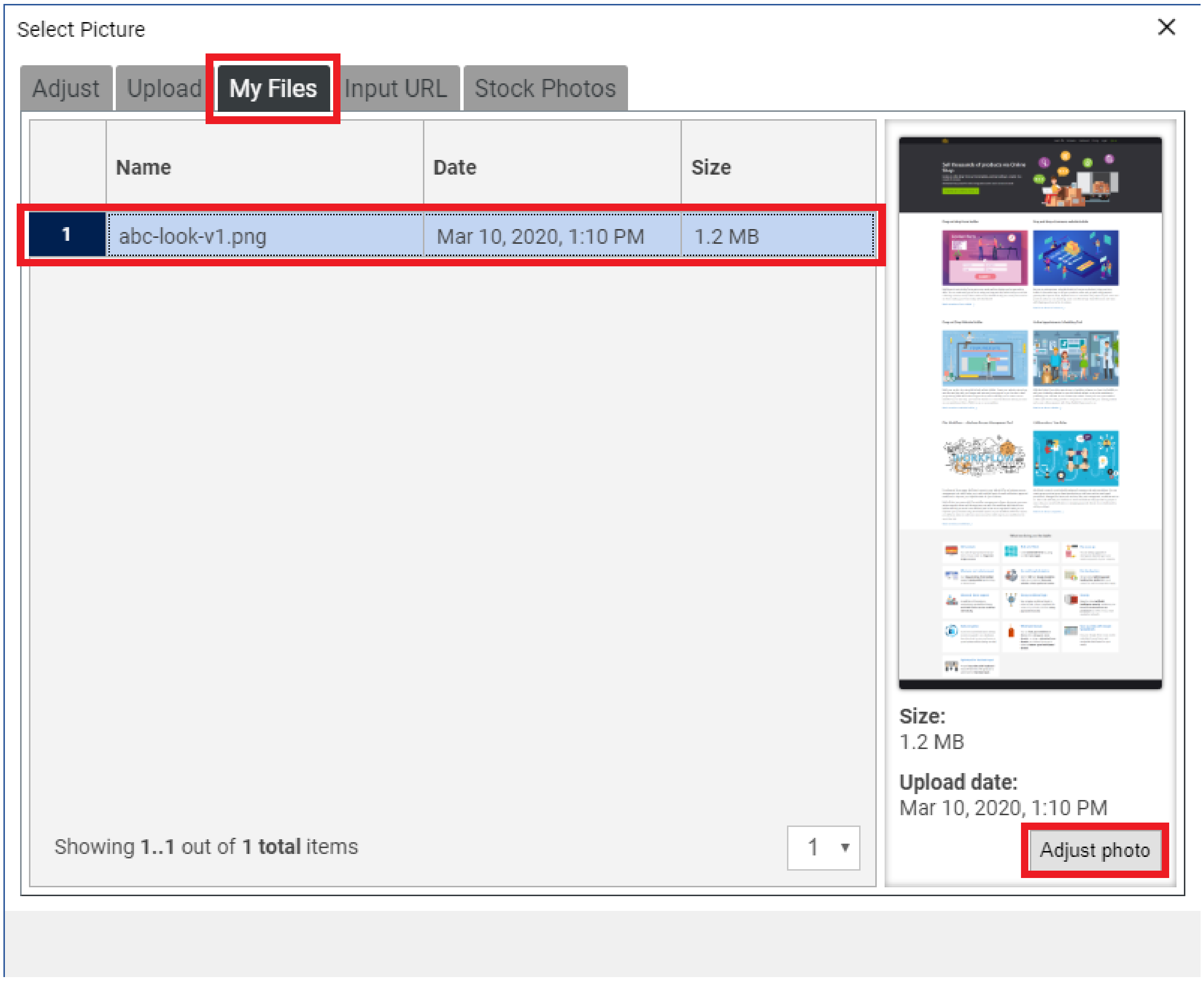
[2.3.17.1] Upload a picture from my computer

1. Click on “Upload” tab
2. Click on “Browse file” button
3. After a successful file upload, Adjust your picture



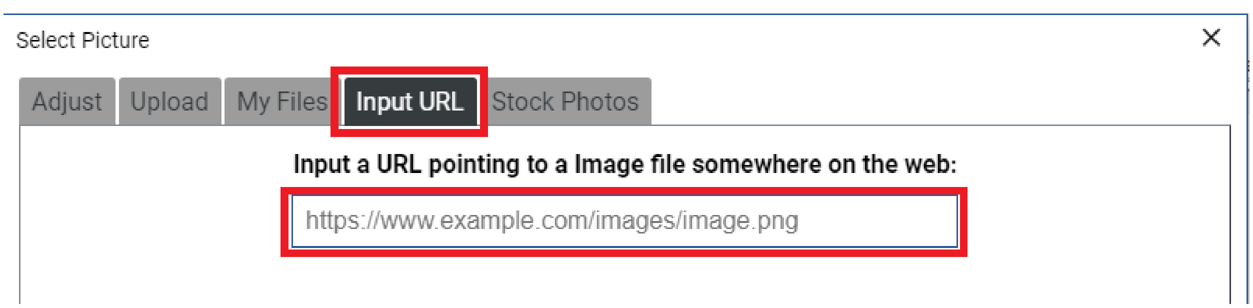
[2.3.17.1] Reuse a previously uploaded picture

1. Click on "My Files" tab
2. Click on the picture you want to reuse
3. Click on "Adjust photo", in order to Adjust your picture



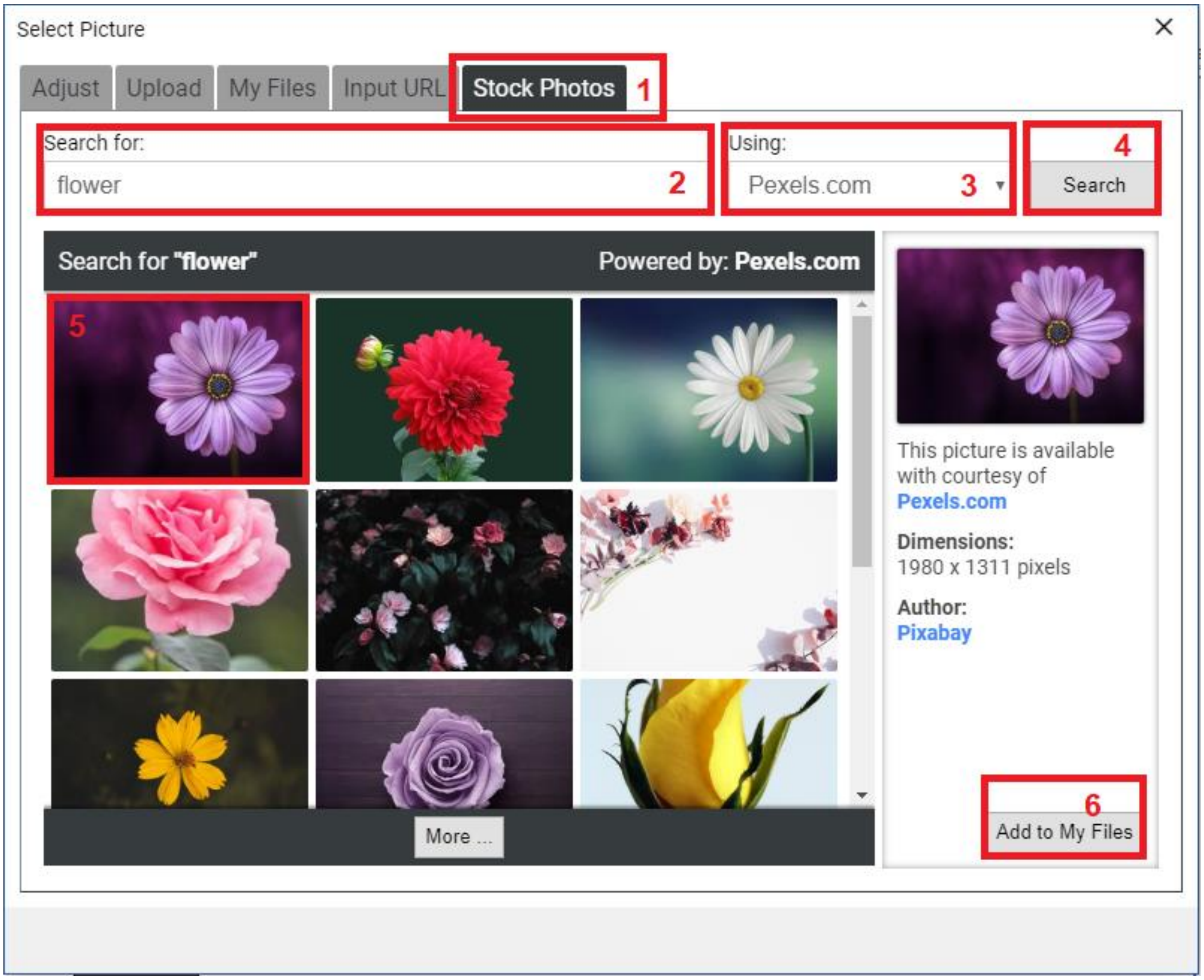
[2.3.17.1] Use a picture straight from the internet, without storing it to your storage

1. Click on "Input URL" tab
2. Paste the link to the picture
3. Adjust your picture



[2.3.17.1] Use a picture provided by a Stock Photo partner

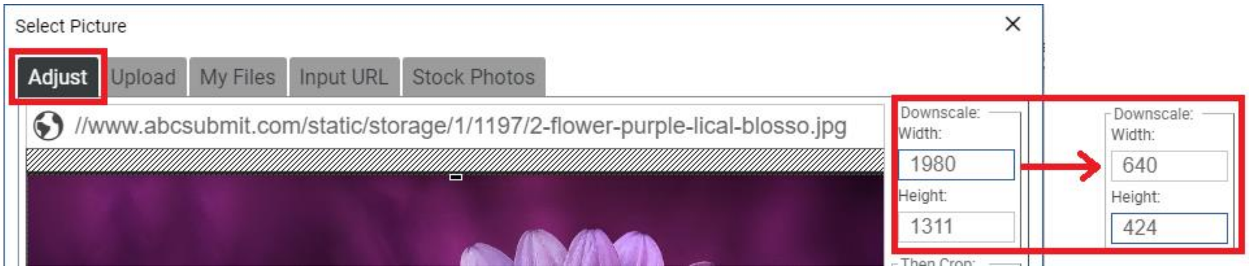
1. Click on Stock Photos tab
2. Fill in the “Search for” textbox with a description of what you’re searching
3. Select stock photo provider (from “Using” dropdown)
4. Click “Search” button
5. Click on the picture you want to use
6. Click on “Add to My Files” button
7. Adjust your picture



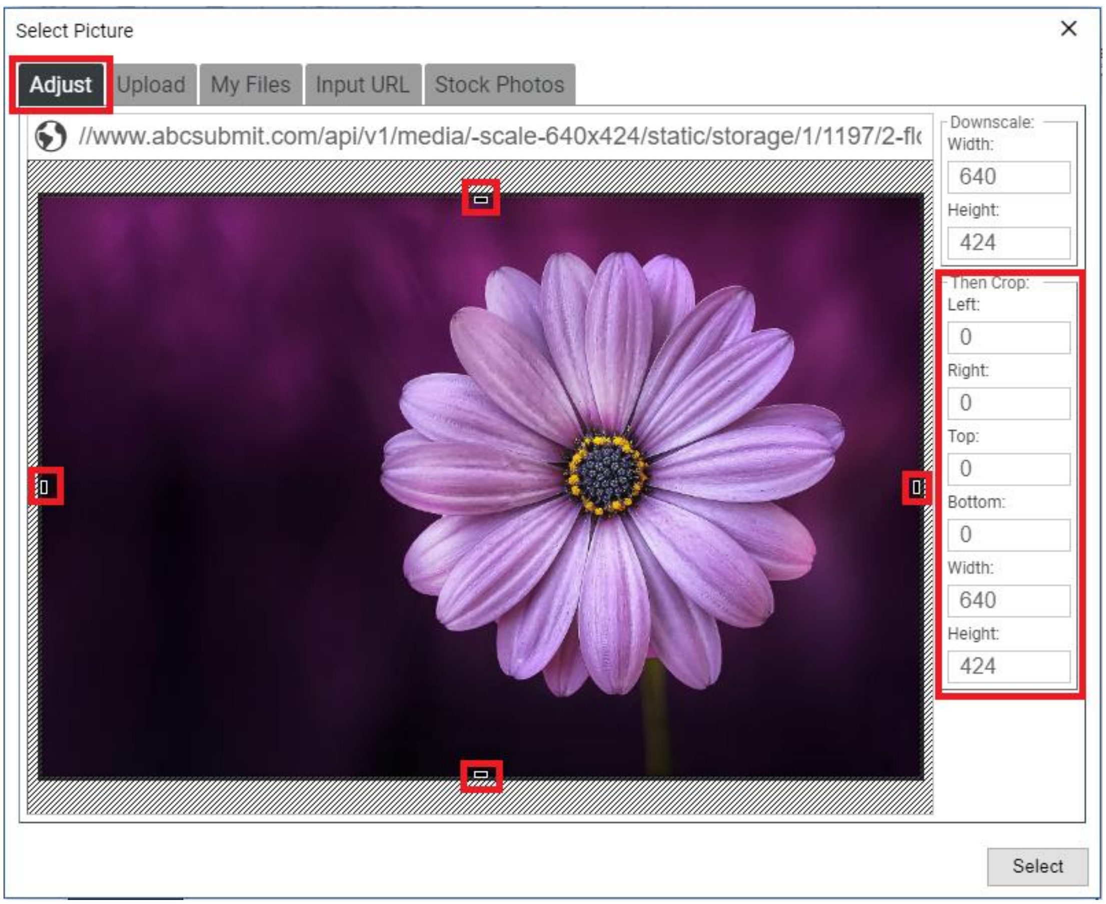
[2.3.17.2] Adjust your picture

Depending on the file size of selected picture, you might want to perform the following operations:

[2.3.17.2] **Downscale** the picture, in order to reduce it's resolution (resulting in faster loading time)



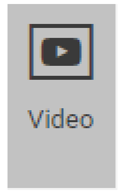
[2.3.17.2] **Crop** the picture, in order to highlight only a region of the picture to be displayed, and further reduce picture size (resulting in faster loading time):



After you are satisfied with both picture size and selected region to be displayed, click on 

button.

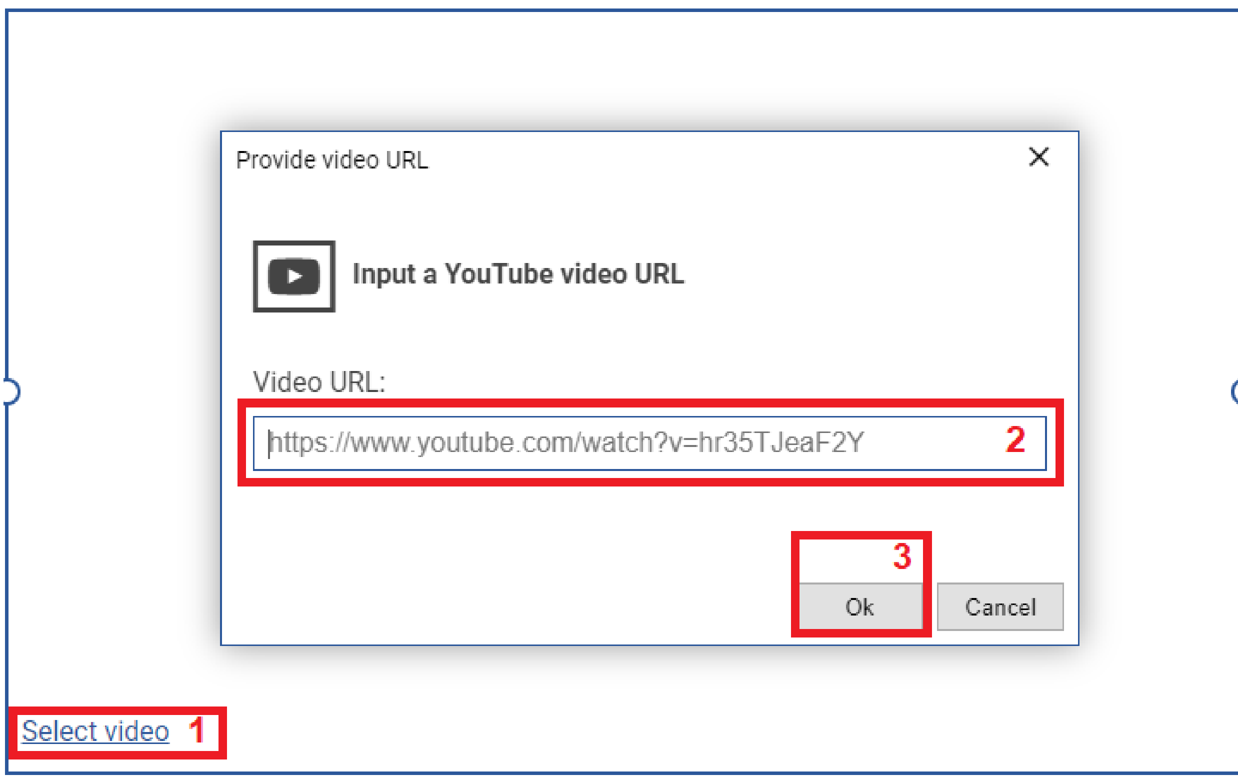
2.3.18. Video (form field)



The video form field can be placed in one of your form pages in order to display a clip from YouTube straight in your form.

*[FAQ] How to **change** / **set a video**?*

1. Click on Video field
2. Click on Select video
3. Paste the video URL (copied from YouTube) in the field "Video URL"
4. Click Ok



2.3.19. **Photo camera** (form field)

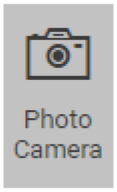
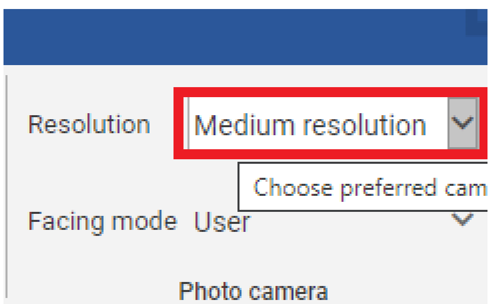


Photo camera form field allows the users of your form to upload selfies or pictures made with the help of their laptop, phone or tablet video camera.

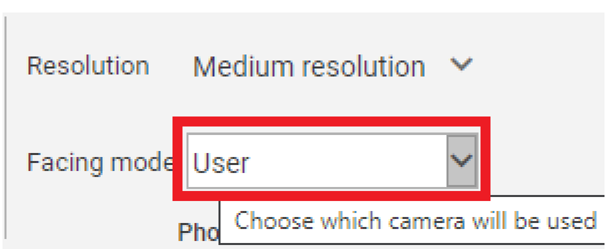
*[FAQ] How to **set** Photo camera **picture resolution***

1. Click on Photo Camera field
2. Adjust “Resolution” setting:



*[FAQ] How to **set the camera used by the phone** which will take pictures?*

1. Click on Photo Camera field
2. Adjust “Facing mode” setting:



Select “User” to use front camera (selfie camera)

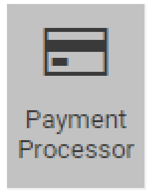
Select “Environment” to use back camera (regular photo camera)

2.3.20. Shopping cart (form field)

In case you intend to sell products via your form, the Shopping cart field allows the visitor of your form to inspect what products he ordered, total amount of order, and remove products from the list.

NOTE: This field is needed in case you want to collect payments with your form.

2.3.21. **Payment processor** (form field)



In case you intend to sell products via your form and you wish to support more than one payment gateway, this field allows the user to choose the payment gateway that will charge the form order.

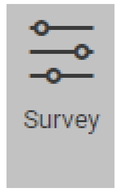
NOTE: This field is needed in case you want to collect payments with your form.

2.3.22. **Product** (form field)

In case you intend to sell products with your form, use the Product field in order to add a sellable item. Product fields are automatically displayed in your Shopping Cart field, and can have multiple choices (color, size, etc). You can assign a photo to each product you add in your form.

NOTE: This field is needed in case you want to collect payments with your form.

2.3.23. **Survey** (form field) (aka. Likert Scale)



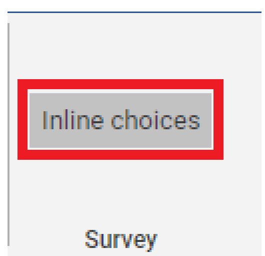
A Survey (Likert scale) **is a rating scale**, often found on survey forms, **that measures how people feel about something**.

You can easily setup your questions and answers in a visual way.

Used to **collect degrees of satisfaction** related to the services of a company for example, **or opinions about a product** you offer.

*[FAQ] How to **show the answers on top of the Survey field** instead of next to each question?*

1. Click on Survey field
2. Click on "Inline choices"



2.3.24. **Net promoter** (form field) (aka. Net Promoter Score)

Use the **Net promoter** form field in order to **collect ratings from 1 to 10 from your form users**, related to a question you ask.

*[FAQ] **Net promoter field values are from 1 to 10**. Can I change this?*

At this point, no. Net promoter field is used to calculate **Net promoter score**, and it depends on values from 1 to 10.

You should add a feature request if you need a Net promoter field with values other than 1..10.

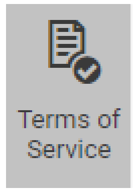
2.3.25. **Rating star** (form field)

Use the **Rating star** form field in order to **collect ratings from 1 to 5 from your form users**, related to a question you ask.

*[FAQ] **Star rating field values are from 1 to 5**. Can I change this?*

At this point, no. You should add a feature request if you need a star rating field with values other than 1..5.

2.3.26. **Terms of service** (form field) (aka. TOS)

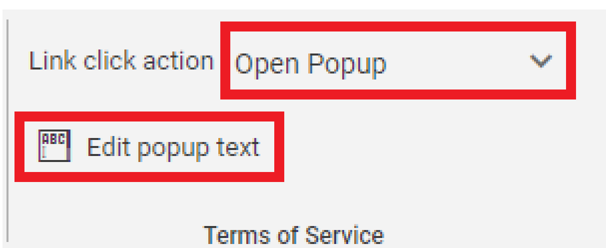


The **terms of service** form field acts like a required checkbox where you can insert a link pointing to a document containing some terms you want the user to agree (an agreement).

Alternate, **you can display inline the terms of service document, inside a popup** which will open if the user clicks on the link from the TOS field.

*[FAQ] How do I **show the agreement text inside of a popup**?*

1. Click on the Terms of service field
2. Select "Open popup" in "Link click action" field:

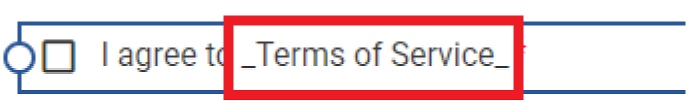


3. Click on "Edit popup text", and write the agreement there. Markdown is supported.

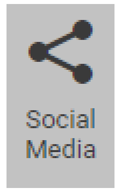
Now when the link of the Terms of Service field is clicked, a popup will be displayed instead of redirecting user to a specified link.

*[FAQ] **No link is displayed** inside Terms of service field*

1. Click on Terms of service field
2. Ensure that the link text is surrounded by underscore characters:



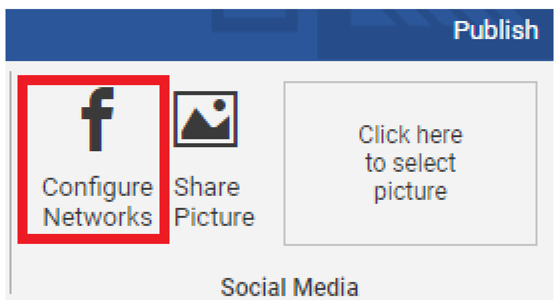
2.3.27. **Social media** (form field)



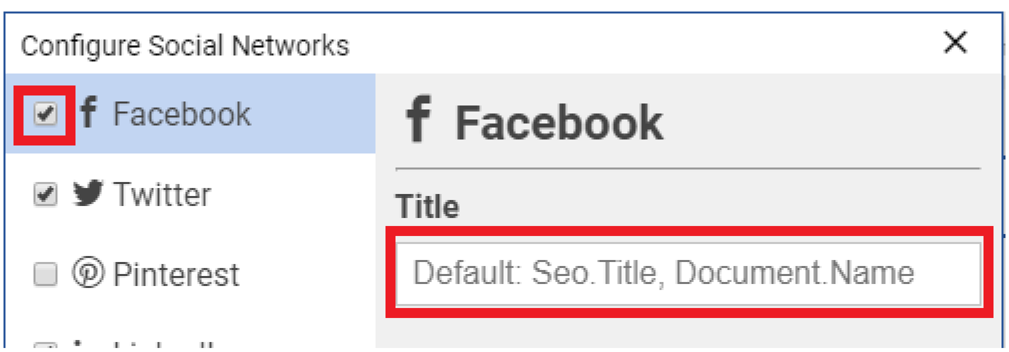
Adds sharing buttons pointing to common social networks in your form, which will help you to collect even more form results via social networks.

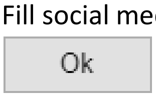
*[FAQ] How to **enable or disable a social network**?*

1. Click on Social Media field
2. Click on “Configure networks” button:



3. A window will appear. **Check (to enable)** or **uncheck (to disable)** desired social network.

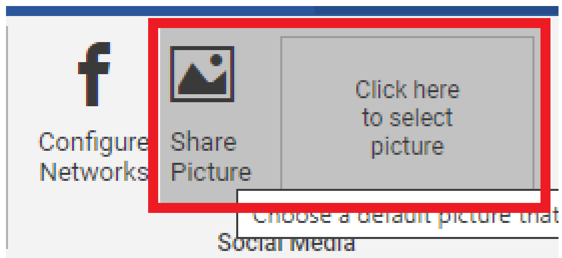


4. Fill social media network configuration (in case of enabling social network), then **click on**


button.

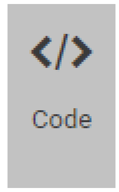
*[FAQ] How to **customize the picture that appears in my shared post** on a social network?*

1. Click on Social Media field
2. Click on "Share Picture" button, which will allow you to upload or customize the shared post picture



For more info regarding how to upload a picture, consult the "How can I change (add) a picture" tutorial.

2.3.28. **Code** (form field)

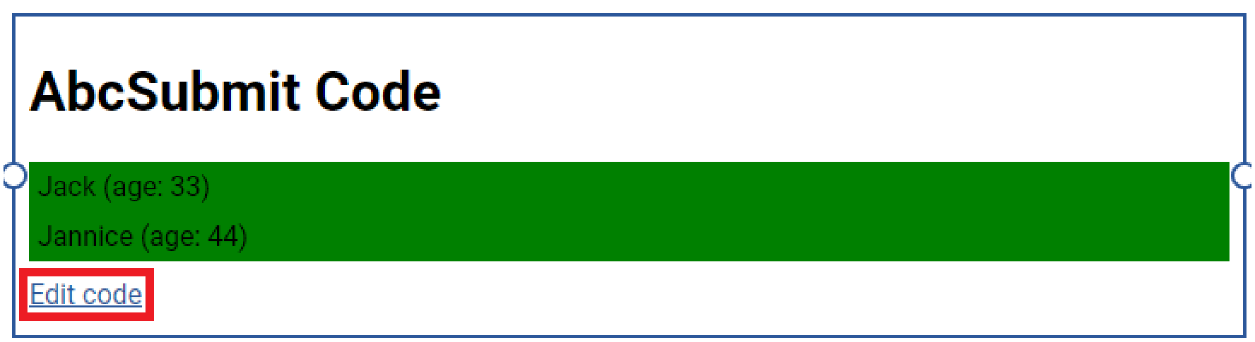


Code field has numerous use cases:

- Add custom CSS to your form
- Create a dynamic widget inside your form by using html / css / and a subset of javascript
- Fetch dynamic data from REST endpoints, and display it as a table for example in your form
- Provides an easy to use template language (like Handlebars) which models the data received from remote REST api endpoints
- Allows interaction with shopping cart via JavaScript, used for advanced shopping scenarios
- Allows interaction with form submission process, adding custom verifications before submitting form
- Add custom HTML to your form (with some restrictions like IFRAME element for example)

[FAQ] Where do I ***edit the code*** *of the "Code" field?*

1. Click on the Code field
2. Click on "Edit code"



3. Write or edit the code in the window that appears:

4. Click on 

button to save and close the “Edit code” window.

*[FAQ] How to **add Custom CSS to my form**?*

1. Edit the code
2. Insert a <style> block with “isolation” attribute set to “global”:

```
<style isolation="global">
    /** write here your custom global CSS **/
</style>
```

2.3.29. **Button** (form field)

You can place a Button on your form in order to redirect the user to a custom link, or execute a form command like “Reset” for example.

*[TIP] **The Button field is designed only for special cases***

- If you want to add a Reset form button on a page of type Thank You or on a page of type Payment error
- If you want to add a button which will redirect user to a link you specify

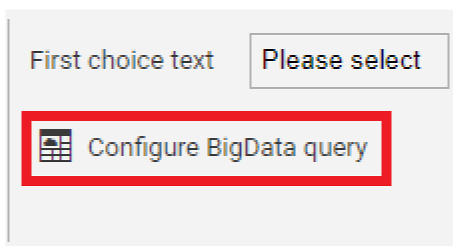
The form editor automatically places your form buttons on each page (Next, Previous, Submit, Reset, etc.).

2.3.30. **BigData dropdown** (form field)

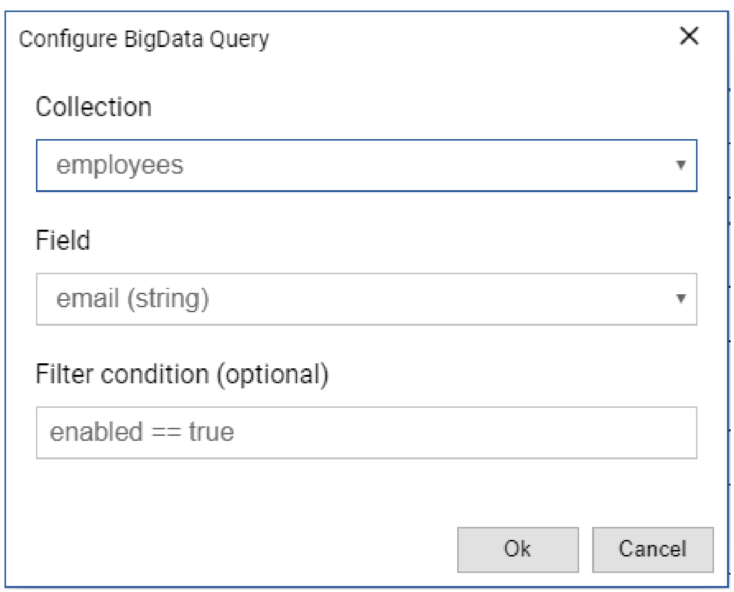
Add a dropdown with dynamic choices in your form, with data fetched from a BigData collection, based on a lookup filter you specify.

*[FAQ] How to **configure** the **BigData dropdown**?*

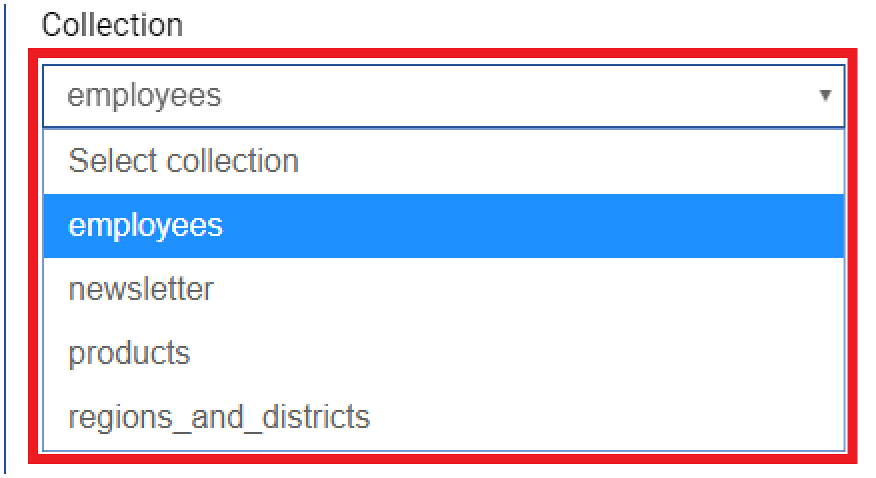
1. Ensure you have at least one BigData collection created, configured and populated
2. Click to select the BigData dropdown field
3. Click on “Configure BigData query”



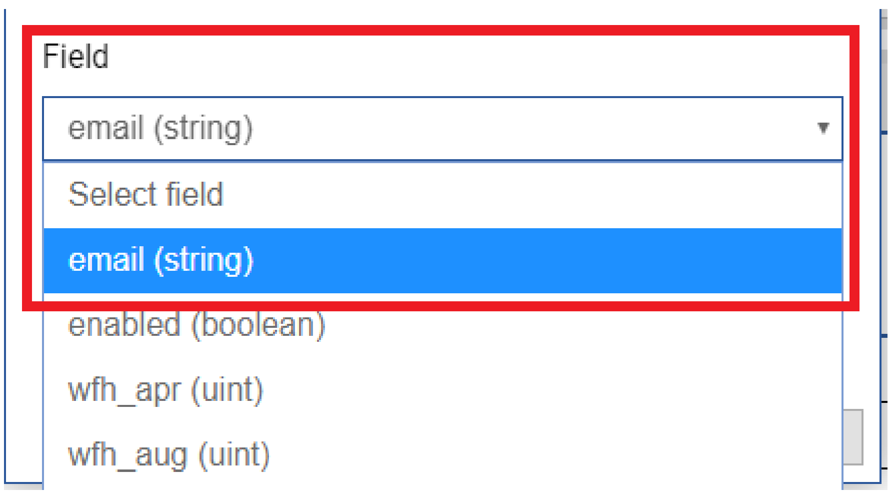
4. A window will appear:



5. In field “Collection”, select the BigData collection from which the dropdown choices will be populated

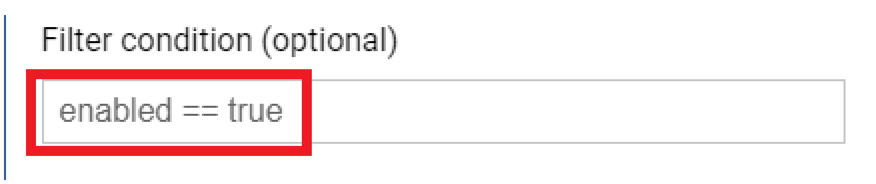


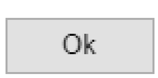
6. In section “Field”, select the field of selected BigData collection which contains the text of the choices of the dropdown:



NOTE: ONLY FIELDS OF TYPE (string), (picture) and (color) CAN BE SELECTED.

7. **Optional step:** you can specify a filter when selecting rows from your BigData collection**. In this example, we wanted to select all the emails from BigData collection “employees”, which have “enabled” (other collection field) set to true**. **In this case, we used filter:**



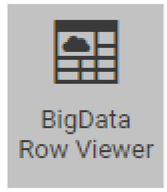
8. Click on 

button. Window will close, and the dropdown will contain the data from your big data collection according to your specified filter.

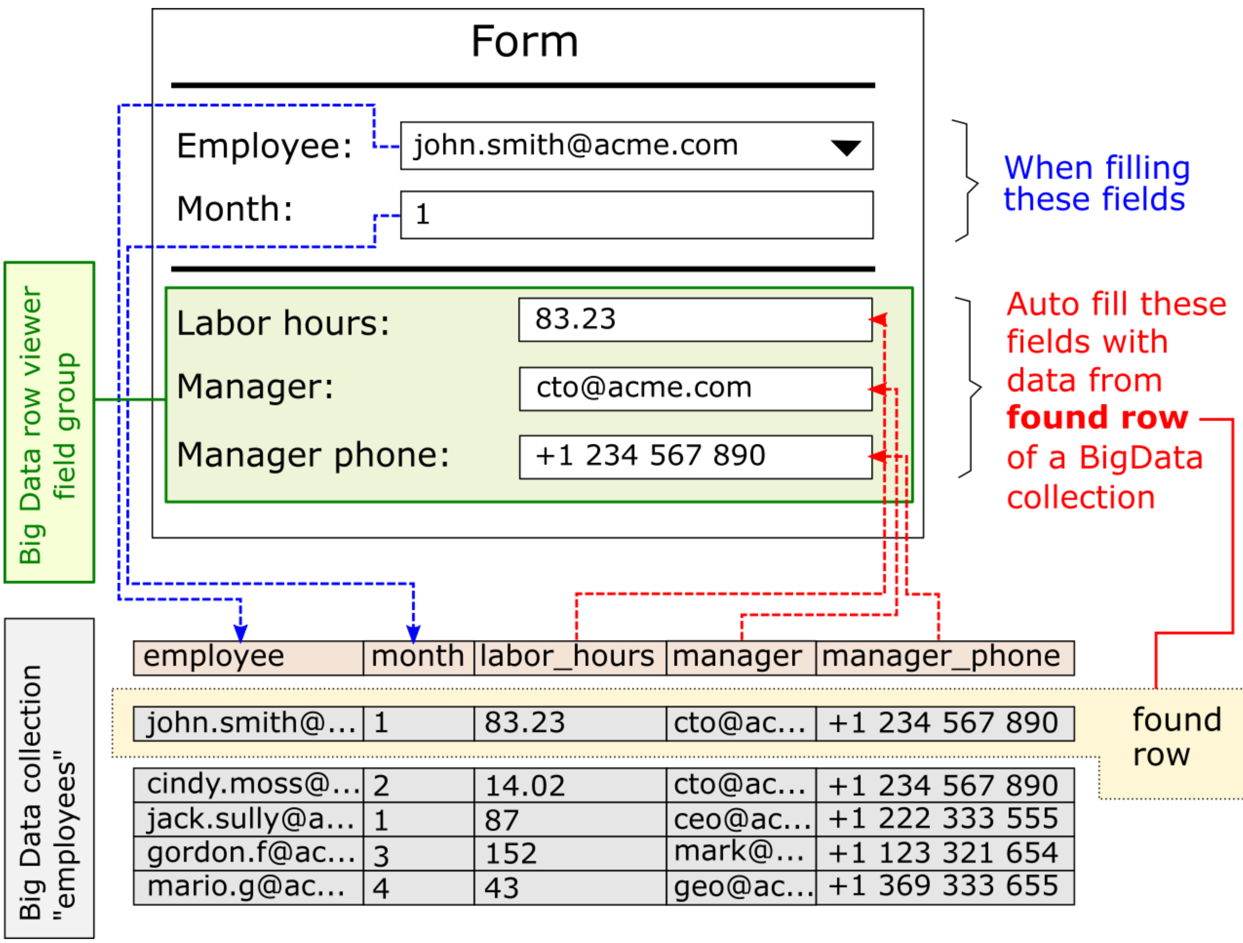
[FAQ] What to write in "Filter condition"?

The syntax of the filter text is the same with the syntax used to filter a BigData collection.

2.3.31. BigData row viewer (form field)



Prefill your form fields with data from a BigData collection, based on a dynamic or static lookup condition (computed from other form fields).



BigData row viewer is used for solving problems like this

Basically, the BigData row viewer is a special group of readonly fields, which are auto-filled with data from a BigData collection.

*[FAQ] Can I **prefill fields from multiple** BigData **collections**?*

No, a BigData row viewer populate fields from a single BigData collection. If you want to populate fields from multiple collections, add more BigData row viewers in your form.

*[FAQ] What happens **when no row is found in collection**?*

All fields from BigData row viewer will be “empty”.

*[FAQ] What happens **when filter matches multiple rows**?*

Only the first found row will be used.

2.3.32. Current user (form field)

If your form requires authentication, this field is automatically prefilled the email address of current company user accessing your form.

[FAQ] How this field can help me?

- In workflows, if your process depends on the user which filled your form
- Works great as “filter” field, if you want to auto-fill data related to a user of your company inside a BigData row viewer.

[TIP] Works only when form setting “Require authentication for this form” is active (click here).

2.3.33. Hidden short text (form field)

Hidden short text is a special field mostly used if you want to allow your company users to attach additional data to a form result, via Workflows.

Each **Hidden short text** is converted dynamically to a **Short Text** field in a **Human Task** workflow node.

[TIP] When to use this field

> If you want to design a **Human task** form inside your Workflow which contains some extra fields **invisible to the user which originally filled the form**, but **visible to** a user of your company or to **a user which edits your form result**.

2.3.34. **Hidden long text** (form field)

Hidden long text is a special field mostly used if you want to allow your company users to attach additional data to a form result, via Workflows.

Each **Hidden long text** is converted dynamically to a **Long Text** field in a **Human Task** workflow node.

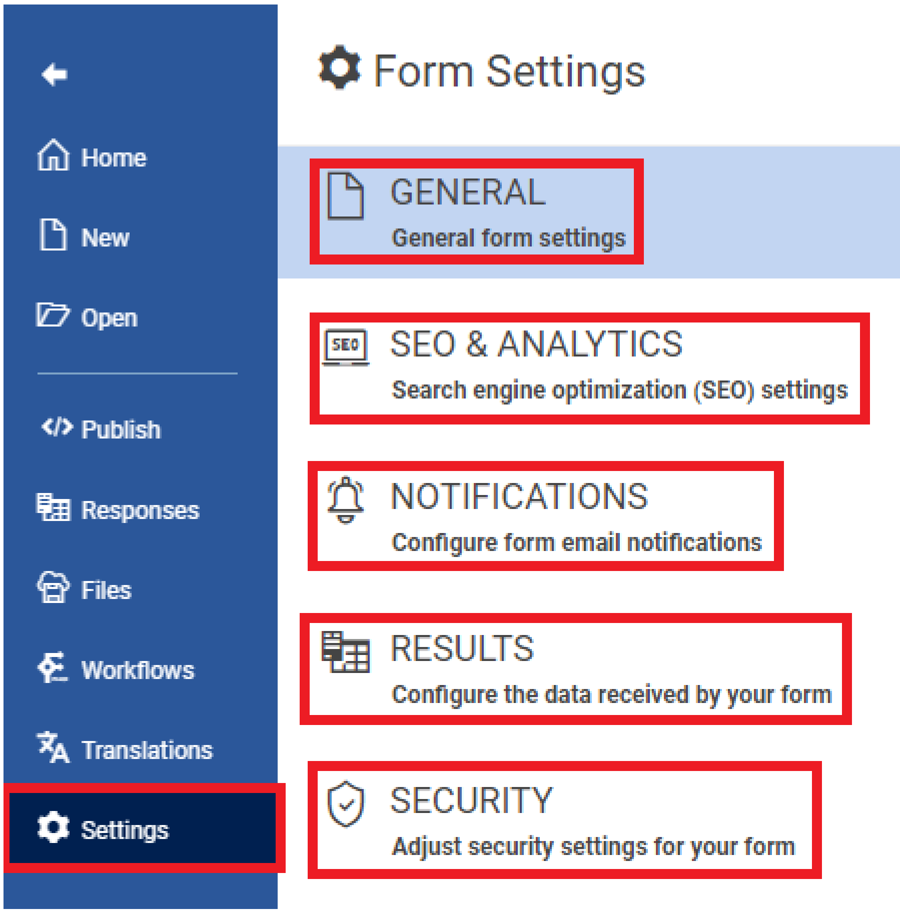
[TIP] When to use this field

> If you want to design a **Human task** form inside your Workflow which contains some extra fields **invisible to the user which originally filled the form**, but **visible to** a user of your company or to **a user which edits your form result**.

2.5. Form Settings

*[FAQ] How do I **access** the **Form settings**?*

The "Settings" section of a Form is available inside the builder menu only after you open a form:

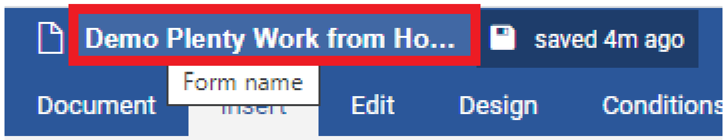


2.5.1. General – General form settings

From this section you can adjust the name of the form, and make your form a template, so that you can reuse it later when creating new forms.

2.5.1.1. Form name

Allows you to set the name of your form. This can also be achieved during form editing, by writing in the form name field:



2.5.1.2. This form is a template

If you check this box, your form will be listed in the Home and New screens so that you can use it as a personal template for further forms you create.

2.5.2. Seo & Analytics – Search engine optimization (SEO) settings

You can enable Google Analytics on your form, and also optimize your form for search engines.

2.5.2.1. Form title

The <title> content of your form HTML page (used by search engines)

2.5.2.2. Form keywords

The <meta name=keywords> content of your form HTML page (used by search engines)

2.5.2.3. Form description

The <meta name=description> content of your form HTML page (used by search engines)

2.5.2.4. Google Analytics code

Paste here your Google Analytics GA code, in order to monitor the views of your form straight from Google Analytics dashboard.

2.5.3. Notifications – Configure form email notifications

From this section you can configure default email addresses used by email notifications generated by your form results and form payments.

2.5.3.1. Default email address

Each time you receive a new form result, by default, an email is sent to the owner of the form (you).

This setting allows you to **override the default email recipient which is used by the new form result notification.**

2.5.3.2. Send email payment notifications

If you enable payments for your form, each time a payment is completed successfully, an email notification is sent to the form owner (you).

This setting allows you to ***activate or deactivate new payment email notification*.**

2.5.3.3. Payment notification email address

If you enable payments for your form and you enable payment notifications, each time a payment is completed successfully, an email notification is sent to the form owner (you).

This setting allows you to ***override the default email recipient which is used by the payment notification***.

2.5.4. Results – Configure the data received by your form

From this section you configure rules regarding the results received by your form (how many results, who can send results, filters, etc.).

2.5.4.1. Accept only these max number of form results

Sometimes you want your form to a **accept only a fixed number of results**. Fill this setting with the fixed number of results your form can accept.

Leave blank for unlimited number of form results.

2.5.4.2. Accept form results only during this timetable

Sometimes you want to accept form results only during specific days of week and specific day hours. Configure this setting in order to accept form results only during days and hours of day you specify.

Excepting configured timetable, your form will be offline, won't accept form results, and a warning will be displayed to users visiting your form.

TIP: **Configure your timezone** in order to make your timetable work as expected.

2.5.4.3. Unique form results based on IP address

Provides you the ability to **forbid multiple (duplicate) form results from the same IP address**.

2.5.4.4. Discard unpaid form results

If you configure payments on your form, **form results corresponding to unsuccessful payments (or payments which were not completed in 15 minutes) will be automatically removed** from the system.

2.5.4.5. Default action after submit

Choose what happens after the form is submitted:

- **Show the Thank you page**,
  or
- **Redirect to a custom link** you specify.

2.5.4.6. Allow later form results editing by original sender

This setting **applies only to our offline forms app**, and is used to grants or forbid the user which submitted the form result to re-edit it's submitted data.

2.5.5. Security – Adjust security settings for your form

From this section you can configure special settings which are restricting the form to be viewed or submitted under certain conditions.

2.5.5.1. Enable CAPTCHA

CAPTCHA is a technology used to prevent software bots (computer programs) to submit your form.

This setting allows you to be sure that **only humans (real persons) are submitting your form** results.

Unless a special reason for disabling CAPTCHA, it is recommended to leave this setting enabled.

2.5.5.2. Protect this form with a password

Allows you to specify a password which is **required to all users** (anonymous and even users from your company) **which are viewing your form**.

2.5.5.3. Require authentication for this form

When "Require authentication" is enabled, the form can be viewed and submitted only by you or the persons specified in "Share this form with the following users or groups from my company".

If the user accessing the form is not authenticated on **AbcSubmit** (as you or as a user of your company), a login screen will be presented before displaying your form.

If user is not allowed to view your form or authentication fails, an error message is displayed, and form displaying is aborted.

2.5.5.4. Share this form with the following users or groups from my company

If Require authentication is enabled, from this setting you can **choose specific users or groups from your company which have access to view and submit your form**.

2.5.5.5. Allow form results only from these countries

You can **specify a list of countries from which you accept form results**.

Country from which a form result is submitted is determined via **Geolocation** (a technology which identifies the country of a user **based on the user IP address**).

2.5.5.6. Forbid form results from these countries

You can **specify a list of countries from which you** do not accept (**reject**) **form results**.

Country from which a form result is submitted is determined via **Geolocation** (a technology which identifies the country of a user **based on the user IP address**).

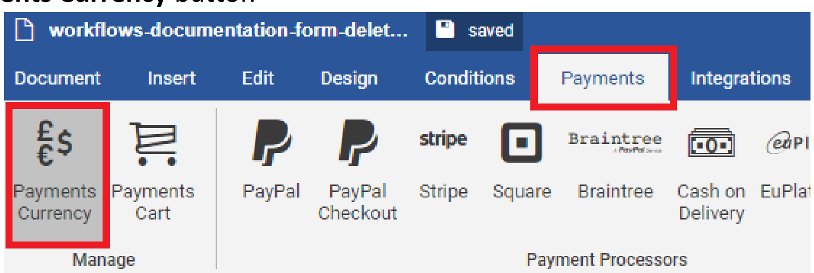
3. **Collect Payments** with your form

In order to collect payments with your form, please consult this checklist:

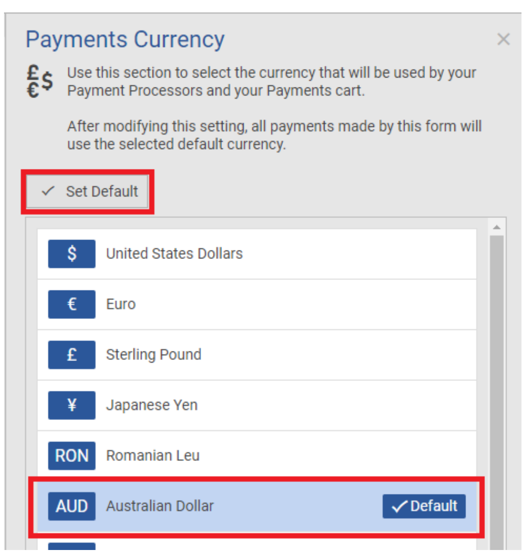
- Setup the currency in which you want to accept payments
- Configure and enable at least one payment processor (as listed in chapters 3.2.x)
- Add some Product fields in your form (1 product per item you want to sell)
- If you intend to add taxes, discounts or shipping costs, configure your Payments cart
- Add a Shopping cart field in your form (at the end)
- If you enabled and configured more than one payment processor, add a Payment processor field in your form (at the end)

3.1. **Setup currency** you want to be used by the Payments system

1. **Click** on **tab Payments**
2. **Click** on **Payments Currency** button



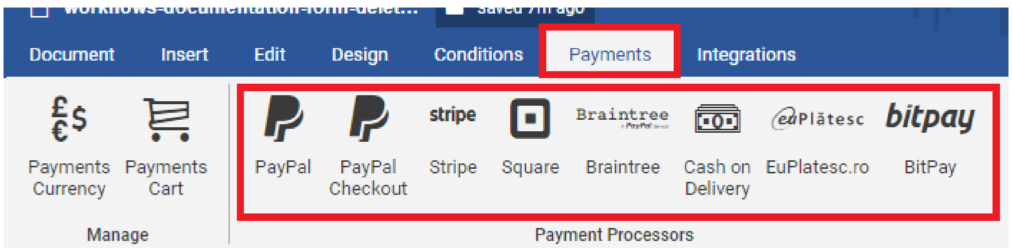
3. A panel will appear in the right side of your form, listing the available supported currencies.
4. **Click to select** desired **currency**
5. **Click "Set Default"**



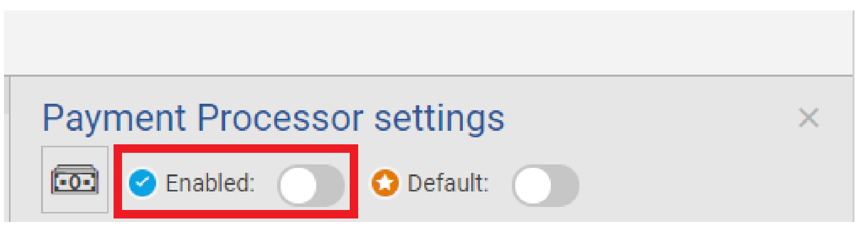
3.2. Configure and enable at least one Payment Processor

[IMPORTANT]: **Each time you alter a setting of a payment processor, the payment processor becomes disabled (until you click again on Enabled switch). Always re-enable a payment processor after you finish making changes.**

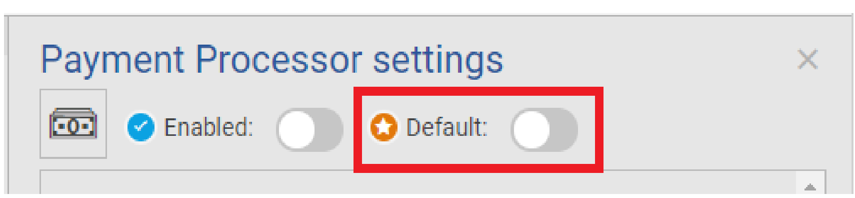
1. **Click** on **tab "Payments".**
2. **Click** on **desired payment processor** you wish to configure / activate:



3. A panel window will appear in the right side of your form, with the settings for the Payment processor you chose.
4. **Fill in the settings for the payment processor (see chapters 3.2.x** corresponding to each payment processor)
5. After you fill all the settings, **do not forget to Enable (and save changes)**: (BUTTON COLOR MUST BE BLUE)



6. **If you want to set this payment processor** as your default payment processor, **do not forget to click on Default switch**: (BUTTON COLOR MUST BE BLUE)

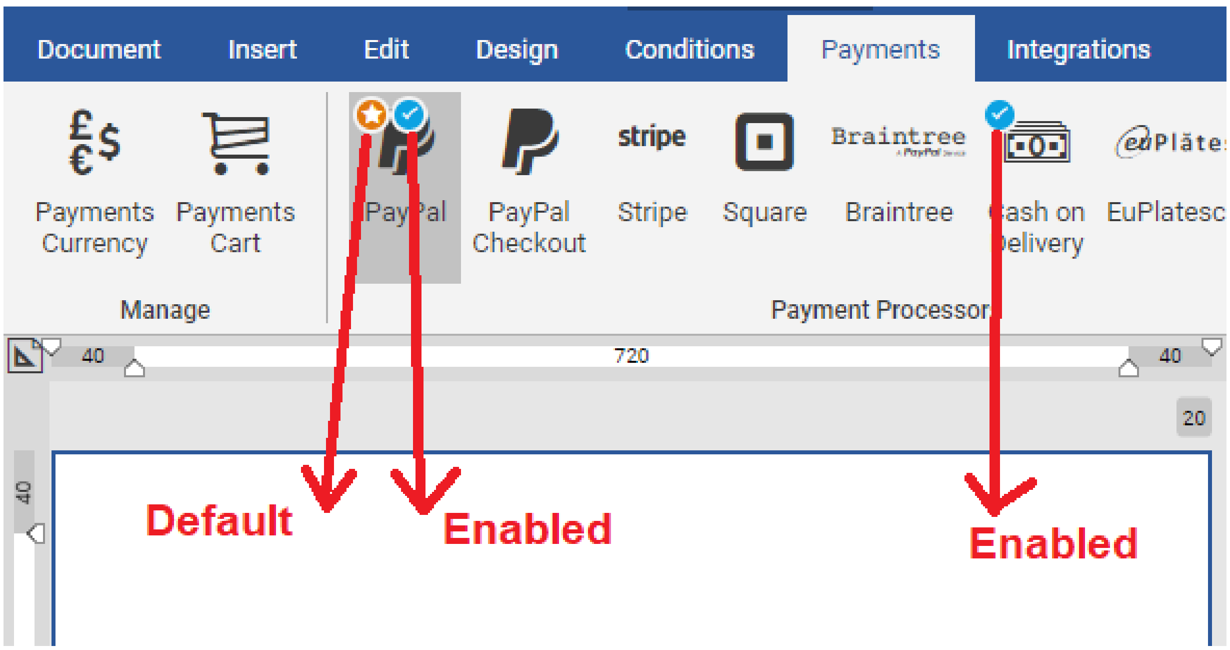


*[FAQ] How do you know **which payment processors are enabled / default**?*

After you successfully configure and enable your payment processor, from a single look in the Payments tab, some visual icons will be painted on top of enabled / default payment processors:

- Payment processor is **enabled**

- Payment processor is **default** (and enabled)

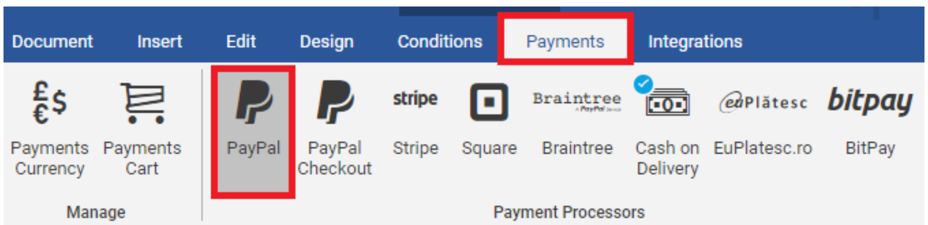


3.2.1. Paypal (payment processor)

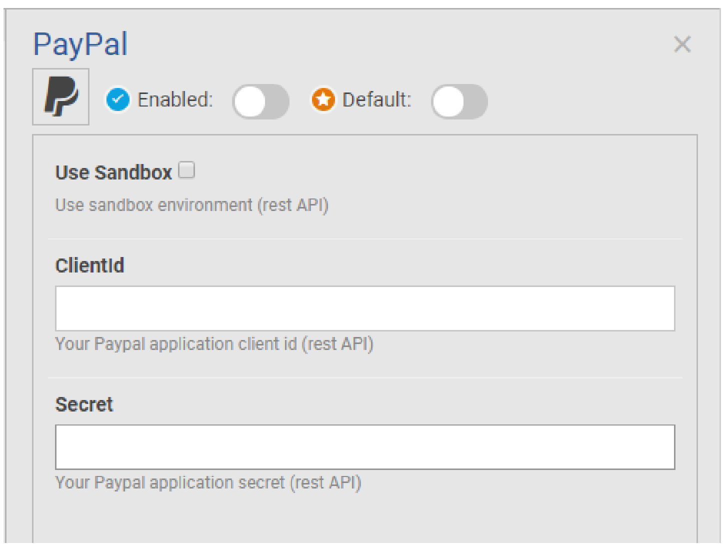
Note: You must have a PayPal business account to accept PayPal payments.

Follow these instructions in order to configure Paypal payment processor

1. Click on **Payments tab**
2. Click on **Paypal** button



3. **Paypal** payment processor **settings** will appear:



4. In your PayPal account, go to **Dashboard** -> **My apps and credentials** and **copy your client id and secret from your PayPal app**.
   If you don't already have a PayPal application, here are the steps to create and manage your first PayPal app.

   See also our simplified tutorial: [FAQ] How to create a live app on Paypal.

5. **Depending on the type of credentials you copied from Paypal** (live or sandbox), check **Use sandbox if needed**.

6. Fill in the **ClientId** and **Secret** with copied **settings from your Paypal account**
7. Click on 

(in order to enable Paypal and save changes)
8. **If you want to make Paypal your default payment processor**, click on 

*[FAQ] How to **create a live app on Paypal**?*

Note: You must have a PayPal business account to accept PayPal payments.

To generate PayPal settings which can be used to use it in AbcSubmit, follow these steps inside your Paypal account:

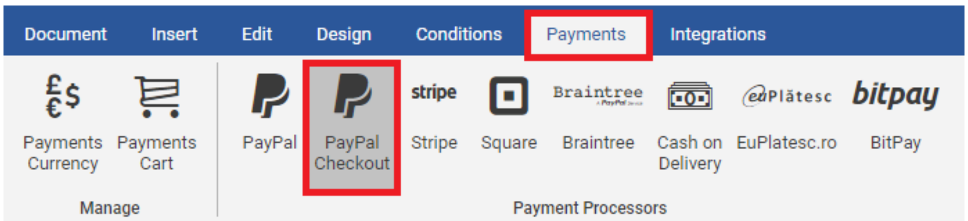
1. **Login into Paypal Dashboard** by typing your PayPal business account email and password.
2. In the **REST API apps** section, click **Create App**. The purpose of this app is to generate your credentials used to configure Paypal on AbcSubmit.
3. **Type a name for your app** and **click Create App**. The page shows your sandbox app information, which includes your credentials. **To show your live app information, toggle to Live**.
4. **Copy and save the client ID and secret for your** sandbox / **live app**.
5. **Review** your app **details and save your app**.

3.2.2. Paypal Checkout (payment processor)

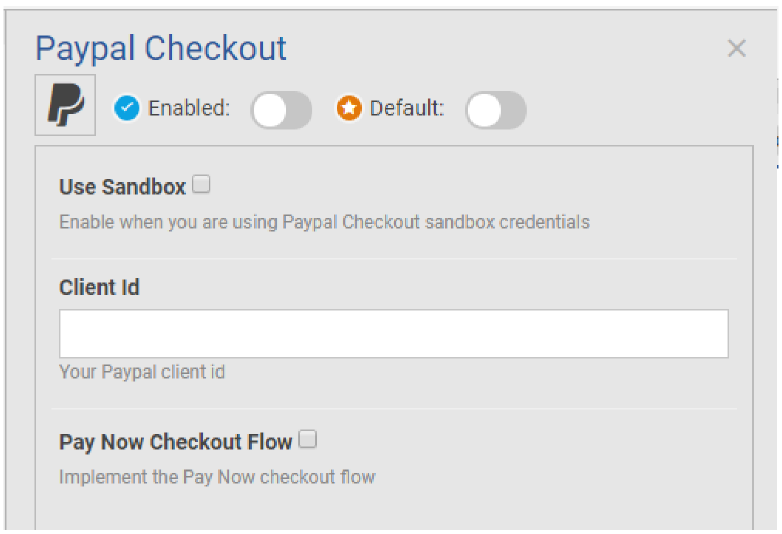
Note: You must have a PayPal business account to accept PayPal payments.

Follow these instructions in order to configure **Paypal Checkout** payment processor:

1. Click on **Payments** tab
2. Click on **Paypal Checkout** button



3. **Paypal Checkout** payment processor **settings** will appear:



4. In your PayPal account, go to **Dashboard** -> **My apps and credentials** and **copy your client id from your PayPal app**.

   If you don't already have a PayPal application, here are the steps to create and manage your first PayPal app.

   See also our simplified tutorial: [FAQ] How to create a live app on Paypal.

5. **Depending on the type of credentials you copied from Paypal** (live or sandbox), **check Use sandbox if needed**.

6. Paste in the setting **Client Id** the client id obtained from your Paypal app

7. **You can** enable the pay now checkout flow by checking **Pay Now Checkout Flow** checkbox.
8. Click on 

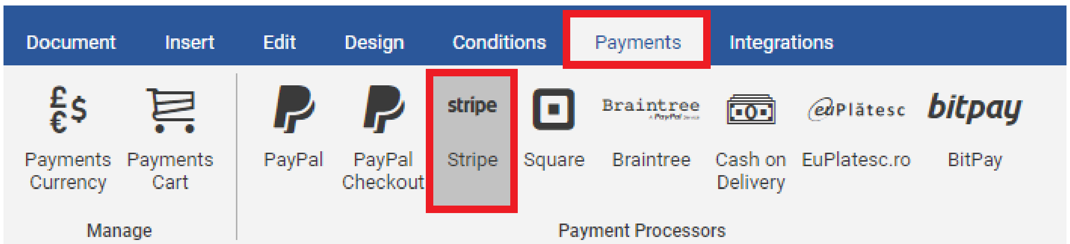
(in order to enable Paypal Checkout and save changes)
9. **If you want to make Paypal Checkout your default payment processor**, click on


3.2.3. Stripe (payment processor)

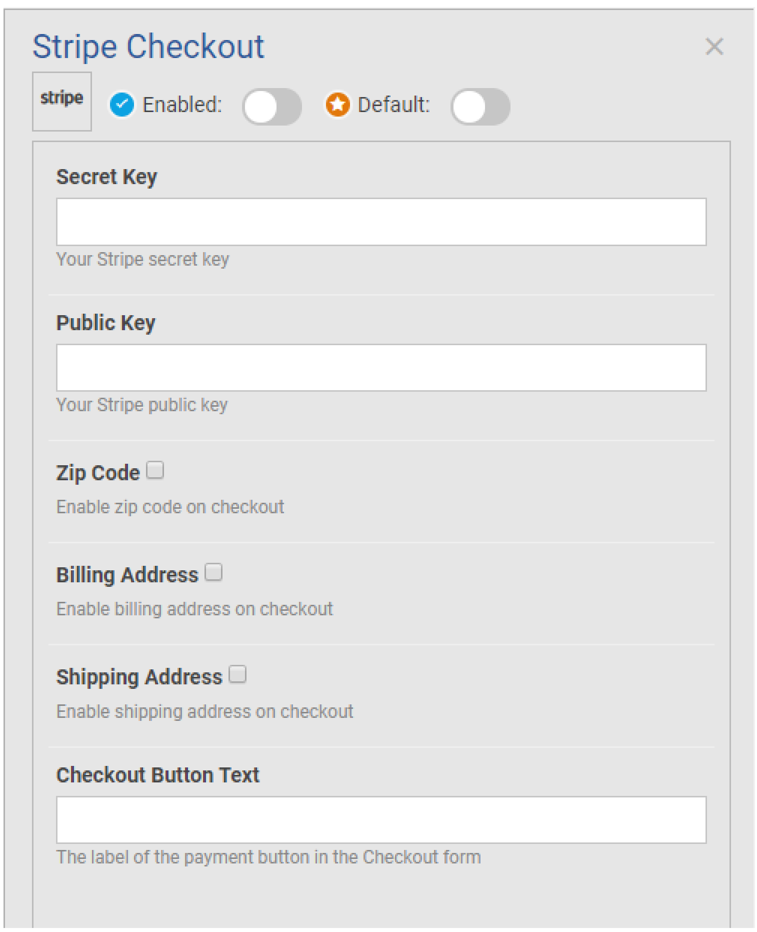
Note: **In order to accept payments via Stripe payment processor, you will need a Stripe account**. If you don't already have a Stripe account, click here to create a new one.

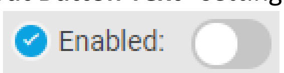
In order to configure your Stripe payment processor, follow these steps:

1. Click on **Payments** tab
2. Click on **Stripe** button



3. Stripe configuration window will appear in the right of your form



4. **In your Stripe account**, go to **Dashboard** -> **Developers** -> **API Keys** and copy your **secret key** and **public key**.
5. Fill "**Secret Key**" and "**Public Key**" settings with the values copied from your Stripe Dashboard.
6. **Optionally**, if you enable **Zip Code**, your clients will be prompted for zip code on checkout.
7. **Optionally**, if you enable **Billing Address**, your users have to fill the billing address on checkout.
8. **Optionally**, if you enable **Shipping Address**, your clients have to fill the shipping address on checkout.
9. **Optionally**, you can **customize the call to action button** in checkout form, by editing the "**Checkout Button Text**" setting field.
10. Click on 

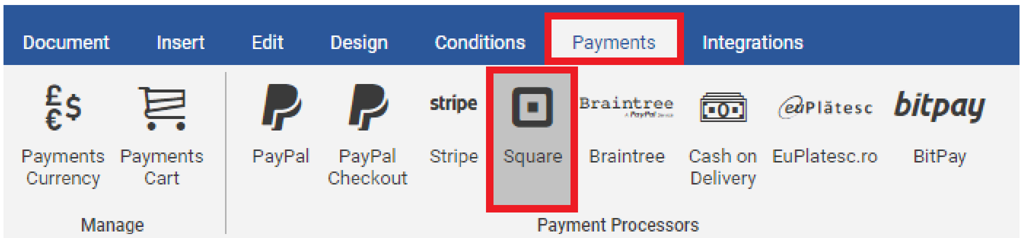
(in order to enable Stripe and save changes)
11. **If you want to make Stripe your default payment processor**, click on 

3.2.4. Square (payment processor)

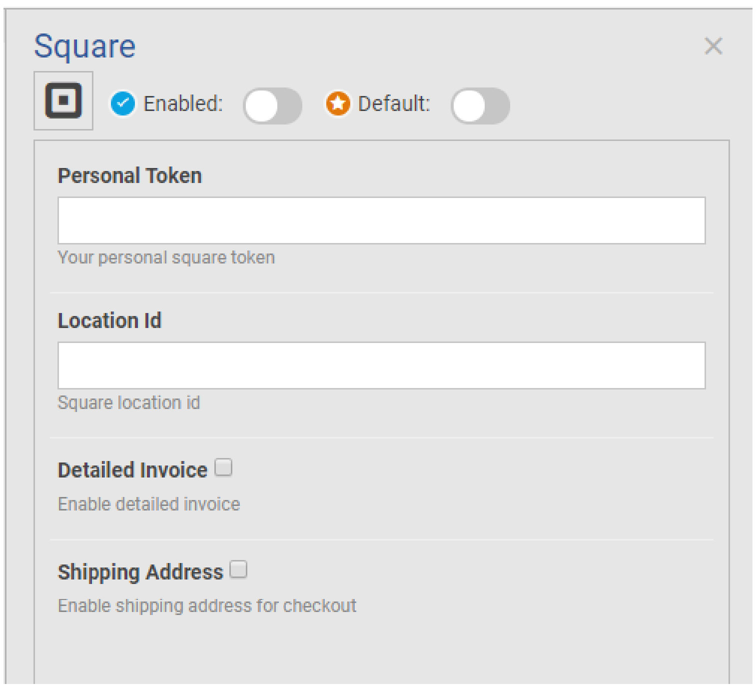
Note: In order to accept payments via Square payment processor, you will need a Square account.

Follow these steps in order to configure your Square payment processor:

1. Click on **Payments** tab
2. Click on **Square** button



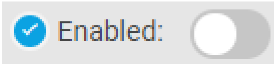
3. Square payment processor configuration window will appear in the right side of your form:



4. **In your Square account**, go to **Apps** -> **My apps** -> **Manage app** and copy your **personal token** and **location id**.

5. Fill the **Personal Token** and **Location Id** settings using copied values from your Square account

6. **Optionally**, you can **choose to show a detailed invoice** on checkout by activating **Detailed Invoice**

7. **Optionally**, you can **enable shipping address on checkout** screen by activating **Shipping Address** option
8. **Click** on 

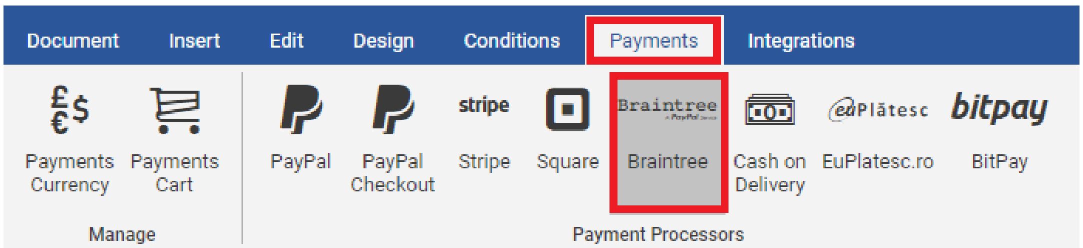
(in order to enable Square and save changes)
9. **If you want to make Square your default payment processor**, click on 

3.2.5. Braintree (payment processor)

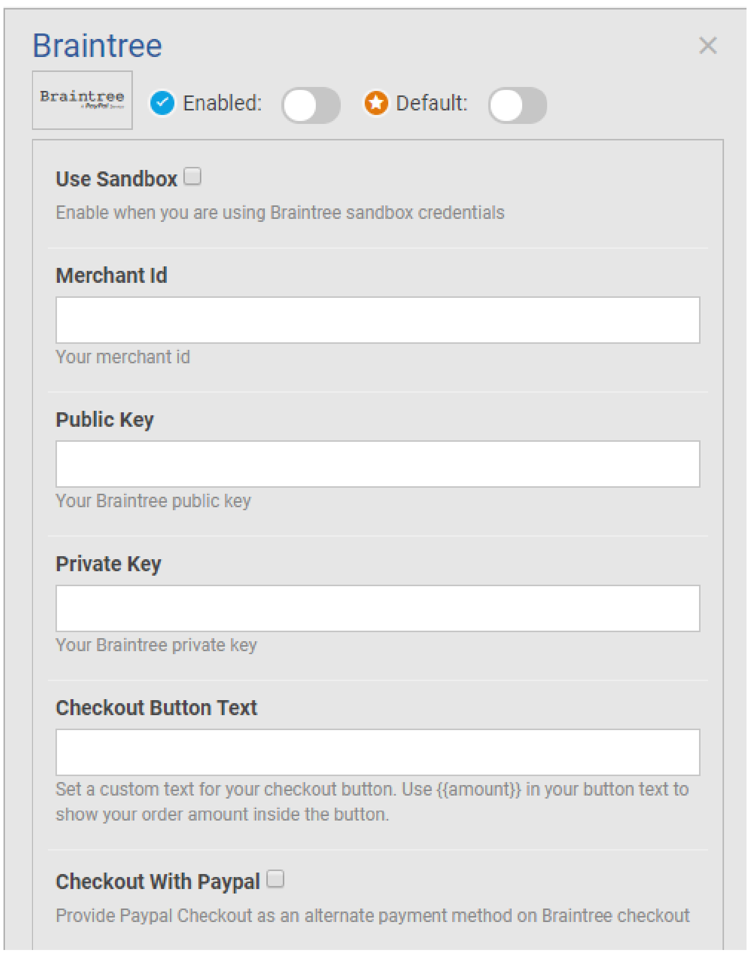
Note: In order to accept payments via Braintree payment processor, you will first need a Braintree account.

In order to configure your Braintree payment processor, please follow these steps:

1. Click on the Payments tab
2. Click on Braintree button



3. Braintree configuration window will appear on the right side of your form:



4. **In your Braintree account**, go to **Settings** -> **API Keys** and copy your **Merchant Id**, **Public Key** and **Private Key**.

5. In Braintree configuration window, fill settings **Merchant Id**, **Public Key** and **Private Key** with values copied from your Braintree account.

6. **If** you are **using** Braintree **sandbox credentials**, enable **Use Sandbox** option

7. **Optional**, you can **specify your own text for checkout button** by adding your text in the **Checkout Button Text** setting.

8. **Optional**, you can **provide PayPal checkout for your clients** by enabling the option **Checkout With Paypal**.

9. **Click** on 

(in order to enable Braintree and save changes)

10. **If you want to make Braintree your default payment processor**, click on 

3.2.6. Cash on Delivery (payment processor)

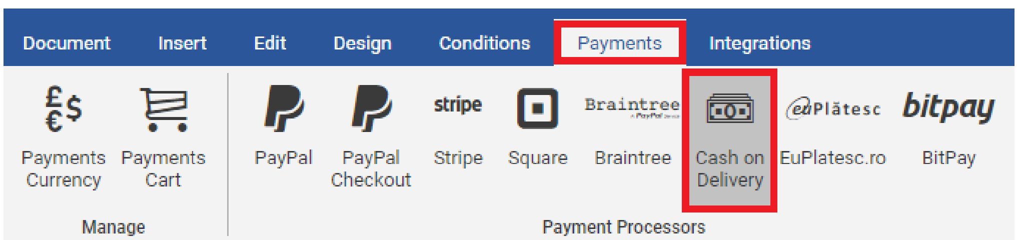
Sometimes, you want to collect money from your clients right at their doorsteps, when your goods are delivered to their location.

Cash on delivery (**COD**), sometimes called **collect on delivery**, is the sale of goods by mail or carriers order where payment is made on delivery rather than in advance. If the goods are not paid for, they are returned to the retailer.

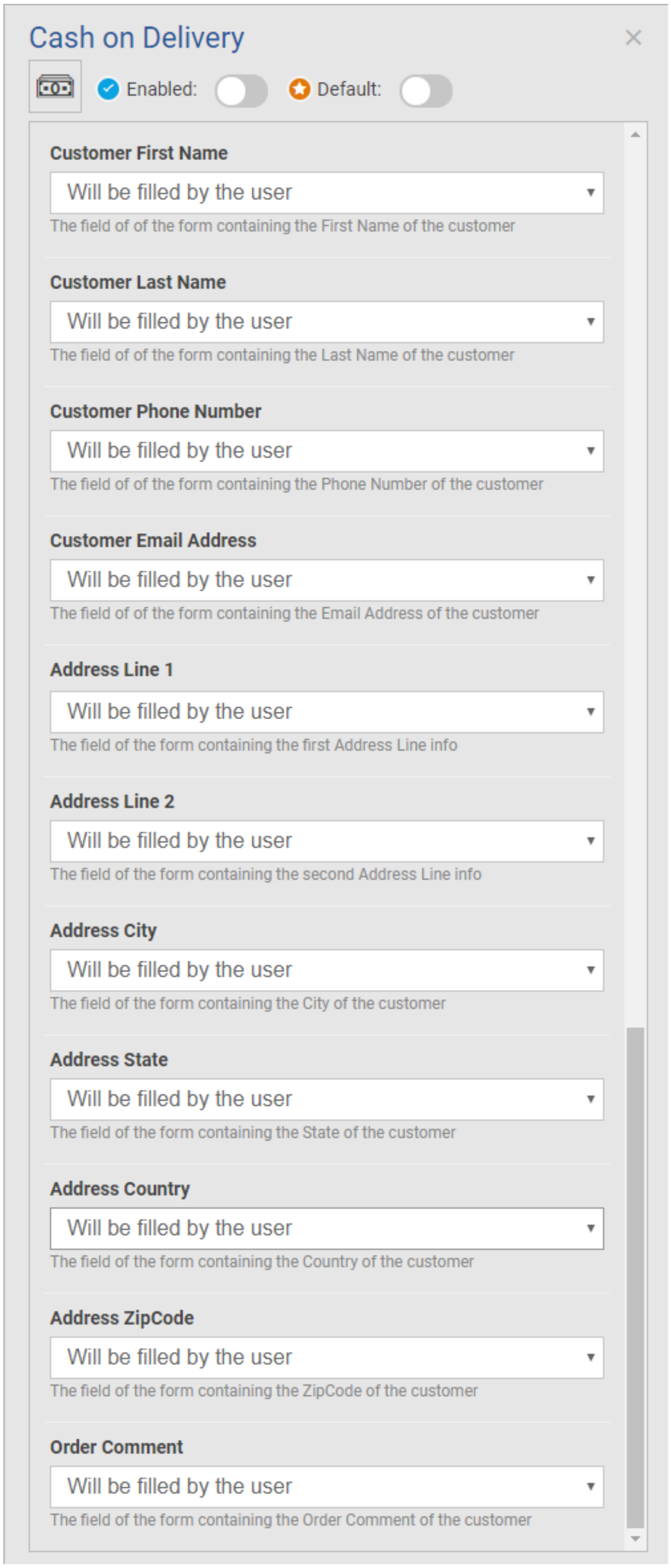
Cash on Delivery payment processor helps you to achieve this method of sale, and also helps you to collect required information needed to deliver the goods.

In order to configure Cash on Delivery, please follow these steps:

1. **Click** on **Payments** tab
2. **Click** on **Cash on Delivery** button:



3. **Cash on Delivery** payment processor **settings** will appear:



4. **Configure the settings of Cash on Delivery** payment processor, keeping these things in mind:
   a. By choosing “Will be filled by the user”, the field will be required in the checkout screen
   b. By choosing “Not needed (hidden)”, the field will not be required or saved in the order details
   c. You can also use a form field to provide the value of a property (field must be present in form at the time you select it)

5. **Click** on 

(in order to enable Cash on Delivery and save changes)

6. **If you want to make Cash on Delivery your default payment processor**, click on 

*[FAQ] **I want to use the Product and Shopping Cart form fields, but I don’t want to use a Payment processor** on my form. Is this possible?*

Yes, it is, **with a small trick**. Configure, enable and set as default the Cash on Delivery payment processor. **Set all Cash on Delivery payment processor settings to value “Not needed (hidden)”**.

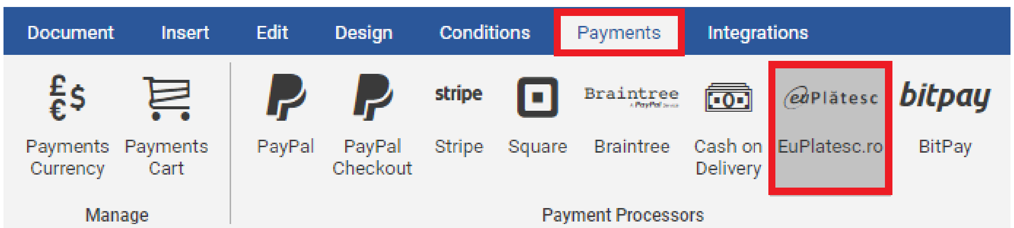
Now you can use the Product and Shopping Cart form fields “without” the need of a real payment gateway.

3.2.7. EuPlatesc.ro (payment processor)

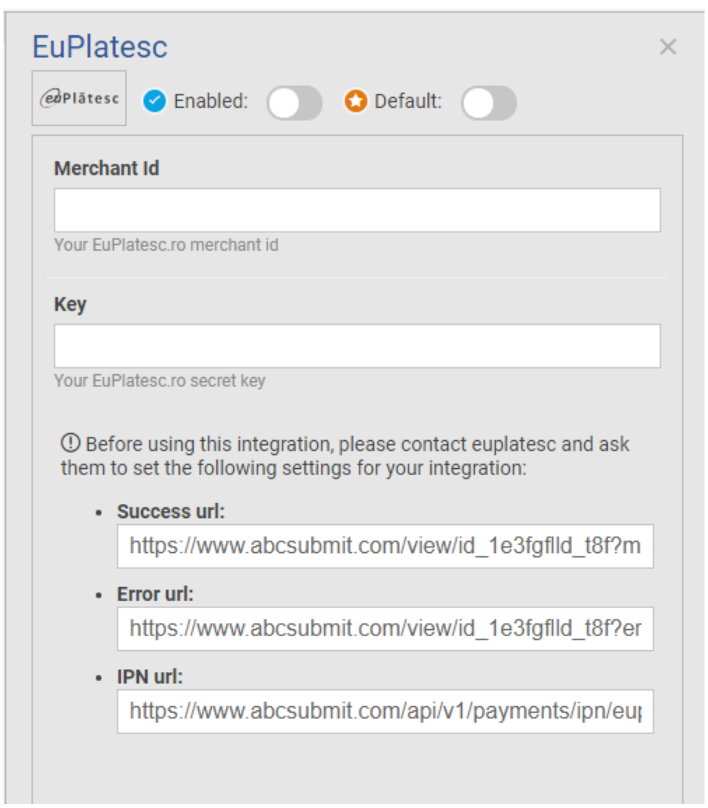
Note: EuPlatesc.ro is a payment processor located in Romania. In order to use EuPlatesc.ro payment processor, you will have first to create an account on their website, and during configuration phase ask them to make some settings on your account.

In order to configure your EuPlatesc.ro payment processor, please follow these steps:

1. **Click** on the **Payments** tab
2. **Click** on "**EuPlatesc.ro**" button:



3. EuPlatesc payment processor configuration window appears in the right side of your form



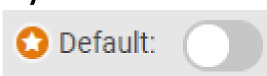
4. Contact Euplatesc.ro, and:

    4.1. Ask them to **provide** your **Merchant Id** and **Key** (then fill the integration settings)

    4.2. Ask them to **set** your **Success url**, **Error url**, and **IPN url** to the values copied from your integration settings.

5. **Click** on 

(in order to enable EuPlatesc.ro and save changes)

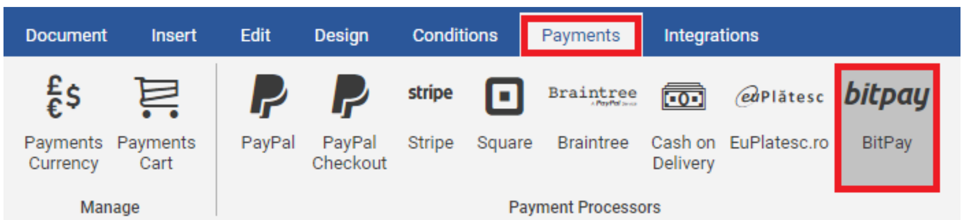
6. **If you want to make EuPlatesc.ro your default payment processor**, click on


3.2.8. BitPay (payment processor)

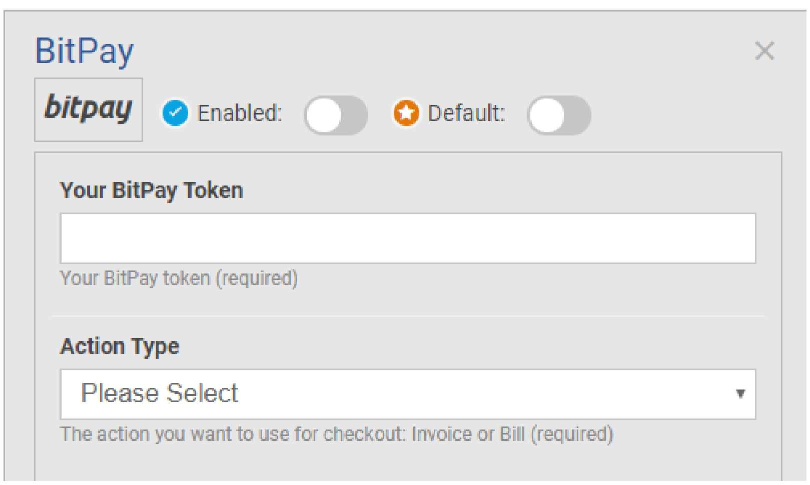
Note: In order to accept payments via BitPay payment processor, you will need a BitPay Business account first.

In order to configure BitPay payment processor, please follow these steps:

1. **Click** on **Payments** tab
2. **Click** on **BitPay** button



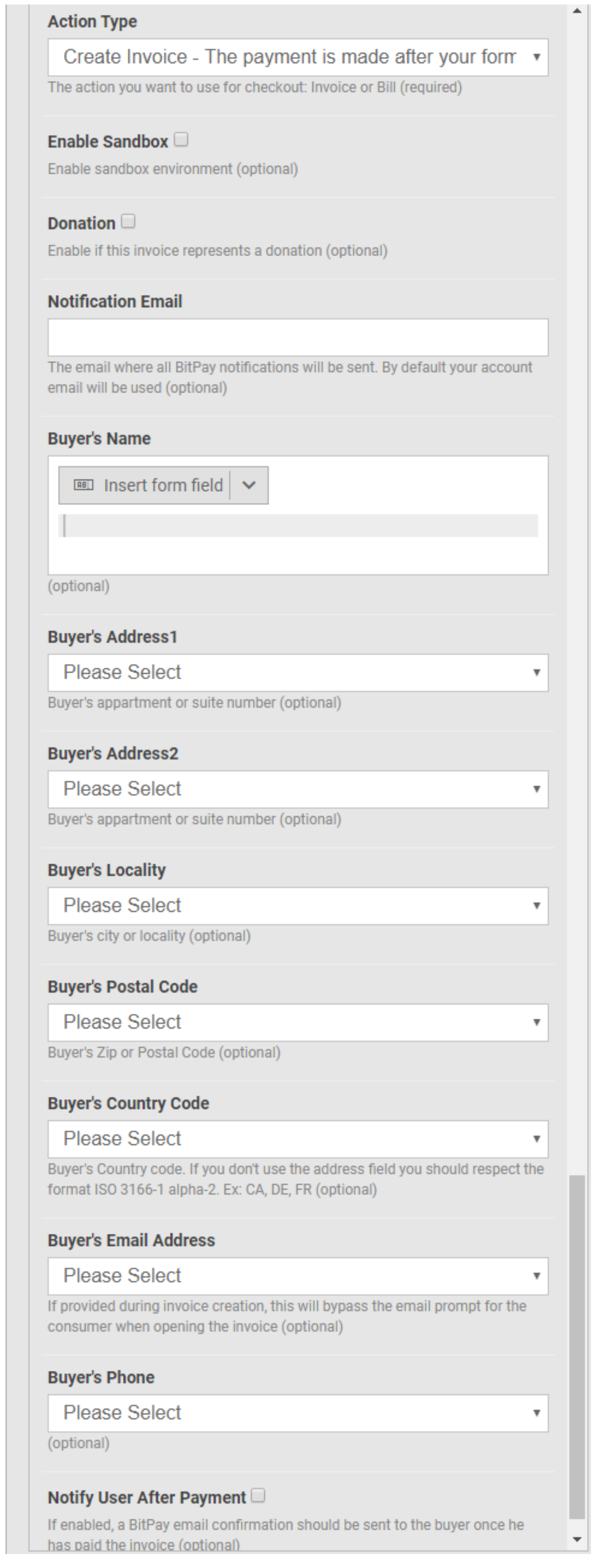
3. BitPay payment processor configuration window will appear:



4. In your BitPay account, go to […] and copy your BitPay token
5. **Fill "Your BitPay Token"** setting field **using value from** your **BitPay account**
6. **Choose an action to be performed by BitPay** payment processor by selecting an "**Action Type**". From this step, you have two configuration modes:

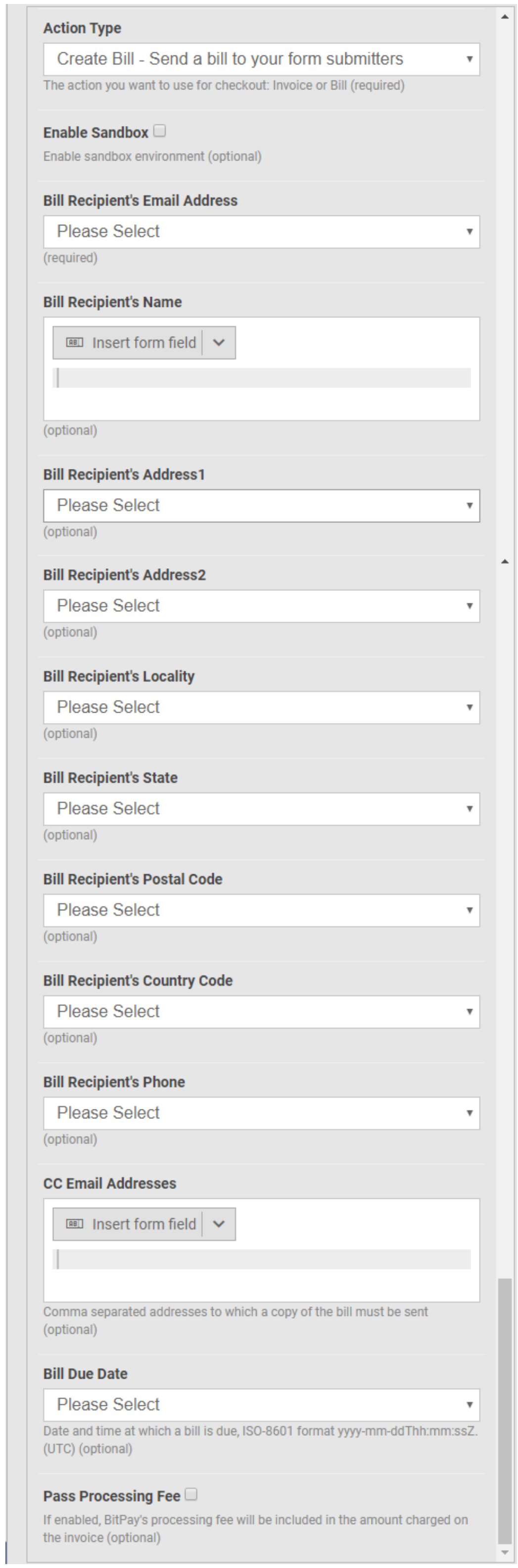
6.1. Action Type: Create Invoice

Additional settings are displayed inside the BitPay payment processor window:



6.2. Action Type: Create Bill

Additional settings are displayed inside the BitPay payment processor window:

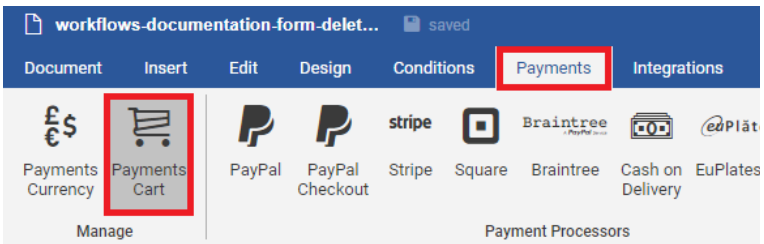


3.3. Configure your Payments Cart (optional) (for discounts, taxes, shipping, etc.)

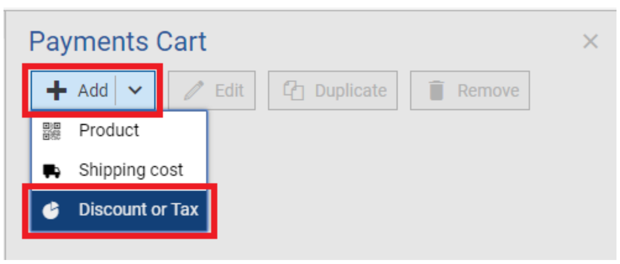
There are scenarios when you need to add a Discount or Tax to your order (visible inside the Shopping Cart field).

*[FAQ] How to **add a fixed value discount***

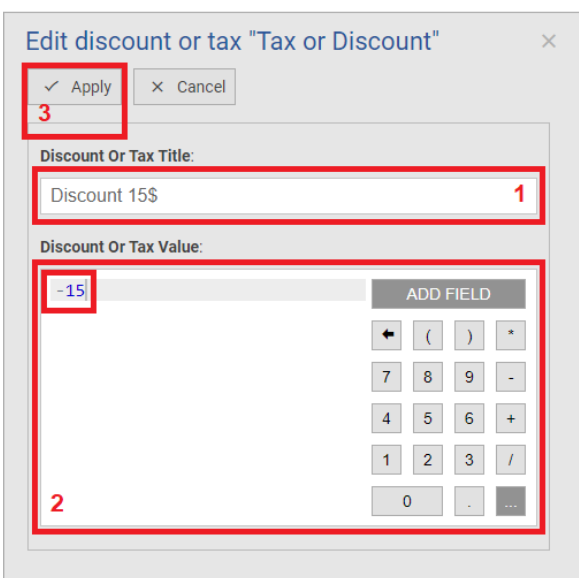
1. Click on **Payments** tab
2. Click on **Payments Cart** button:



3. Payments Cart configuration window will appear in the right side of your form. **Click** on "**Add**", **then click** "**Discount or Tax**":



4. Edit discount or tax screen will appear:



5. **(1)** In the **Discount or Tax Title** setting, fill the name of your discount (will appear in shopping cart)

6. **(2)** In the **Discount or Tax Value** setting, input the fixed value of your discount (**must be negative**).

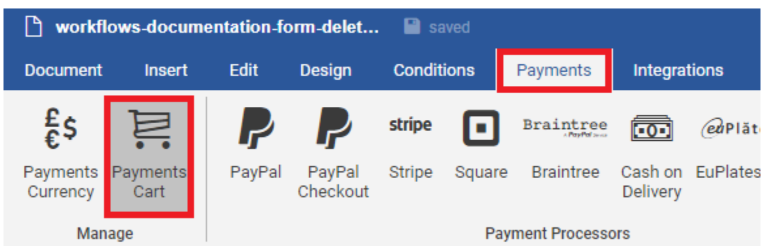
   Currency used for the discount value is the currency of your form.

For setting a discount of …	Set **Discount or Tax Value** to
15 $	-15
15 %	-SHOPPING_CART_PRODUCTS_TOTAL() * 0.15

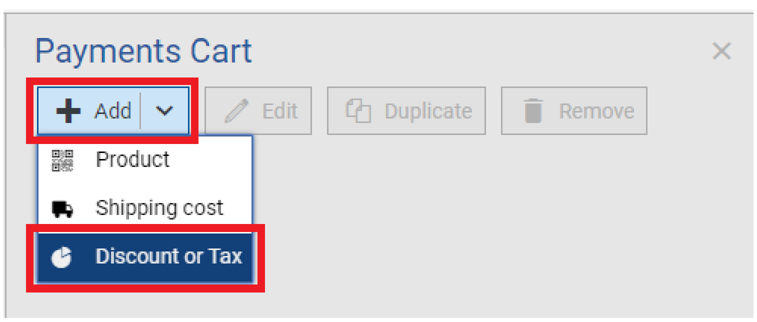
7. **(3)** Click "**Apply**"

*[FAQ] How to **add a 15% discount** (for all products added in the cart)*

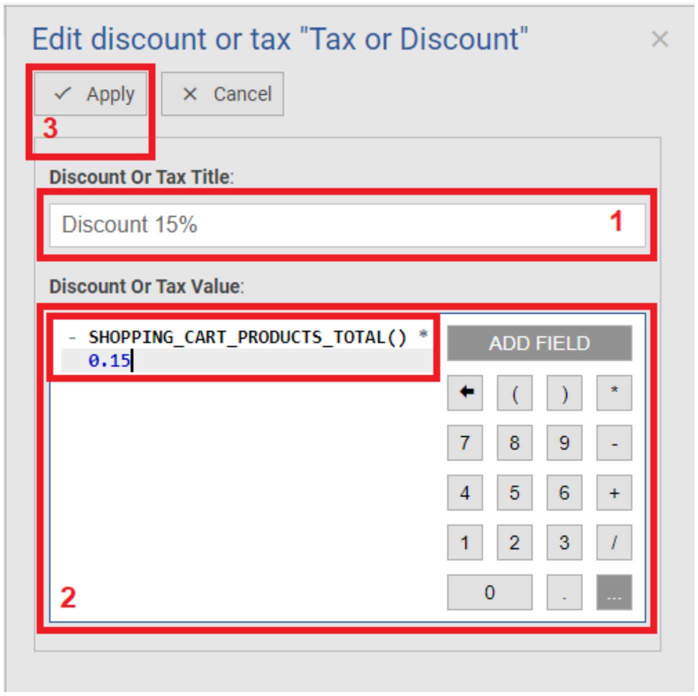
1. Click on **Payments** tab
2. Click on **Payments Cart** button:



3. Payments Cart configuration window will appear in the right side of your form. **Click** on "**Add**", **then click** "**Discount or Tax**":



4. **Edit discount or tax screen** will appear:



5. **(1)** In **Discount or Tax Title** field, input the title of your percentual discount (will appear in Shopping Cart)

6. **(2)** In **Discount or Tax Value** field, input the following text (representing a formula). **Please note the "-" (minus) sign at the beginning of formula**:

- SHOPPING_CART_PRODUCTS_TOTAL() * 0.15

For setting a discount of ...	Set **Discount or Tax Value** to
15 $	**-15**
15 %	**-SHOPPING_CART_PRODUCTS_TOTAL() * 0.15**

7. **(3) Click** "**Apply**"

*[FAQ] How to **add a fixed value Tax** or **percentual value Tax***

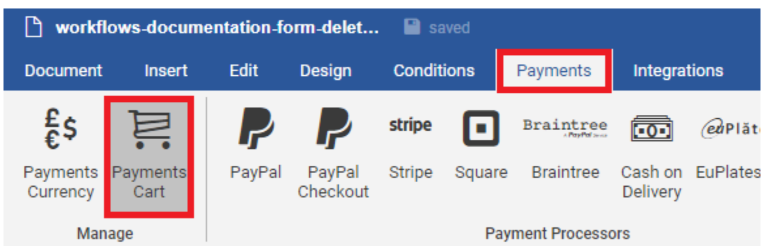
The difference between a Discount and a Tax is that the **Tax value is positive**, and **Discount value is negative**.

In order to add a Tax, follow the same procedure for adding a discount, but input positive values instead of negative values in “**Discount or Tax Value**” setting.

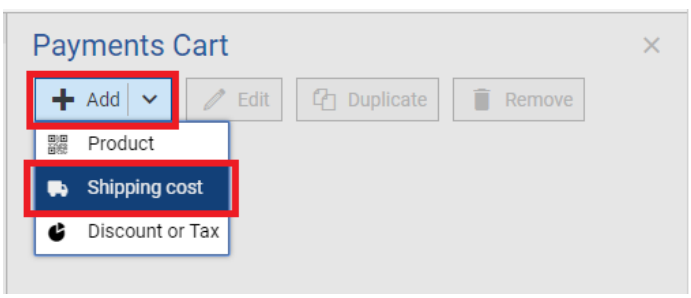
For setting a tax of …	Set **Discount or Tax Value** to
15 $	**15**
15 %	**SHOPPING_CART_PRODUCTS_TOTAL() * 0.15**
Add packaging cost of 1 $ for each product in shopping cart	**SHOPPING_CART_PRODUCT_QUANTITIES() * 1**

*[FAQ] How to **add a shipping cost**?*

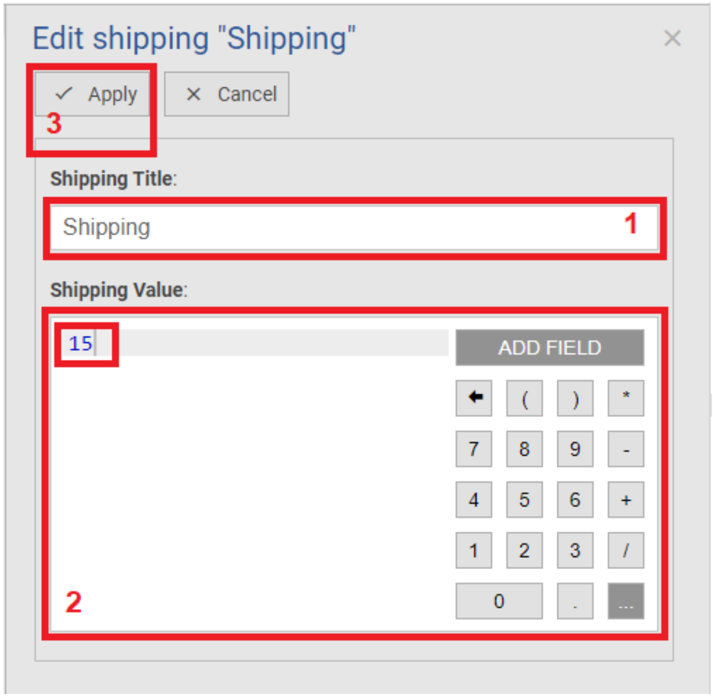
1. Click on **Payments** tab
2. Click on **Payments Cart** button:



3. Payments cart window will appear. Click on Add, then click on “Shipping cost”:



4. Edit Shipping screen will appear:



5. **(1)** In **Shipping Title** field, write a short description of the shipping (e.g.: Shipping via airplane)

6. **(2)** In **Shipping Value**, write the value of the cost of the shipping:

To add a Shipping tax of:	Set **Shipping Value** to:
Fixed value, 15$	**15**
Add 1$ shipping for each product in your shopping cart:	**SHOPPING_CART_PRODUCT_QUANTITIES() * 10**

7. **(3) Click** "**Apply**"

4. Integrate your form with 3rd party platforms

After the Submit button of your form is pressed, you have the opportunity to communicate your form results to other platforms / systems which are not managed by AbcSubmit (3rd party integrations).

[Note]: If you are searching on how to collect payments with your form, consult instead chapter 3 – Collect Payments with your form.

*[FAQ] **Are integrations executed real time** after submit button is pressed?*

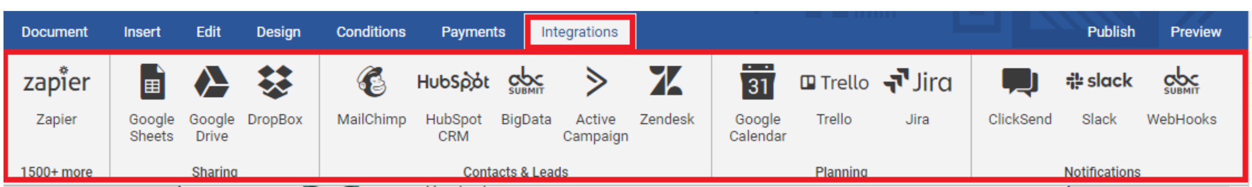
Real-time don't exist in reality, however:

All configured form integrations are scheduled inside a **first-in / first-out queue**, which parallelize integration execution on a self-scaling in-cloud amqp worker infrastructure.

Depending on server load, expect delays between 0.1 seconds - 1 minute before your 3rd party platform will receive the submitted results of your form.

4.1. Configure and enable your integration(s)

By clicking the "Integrations" tab of the builder, you can see the list with all supported 3rd party integrations by AbcSubmit:



In order to integrate your form with a specific platform, click on the button corresponding with the platform you wish to integrate, and follow specific instructions for that platform by accessing chapters 4.1.x.

4.1.1. Zapier (form integration)

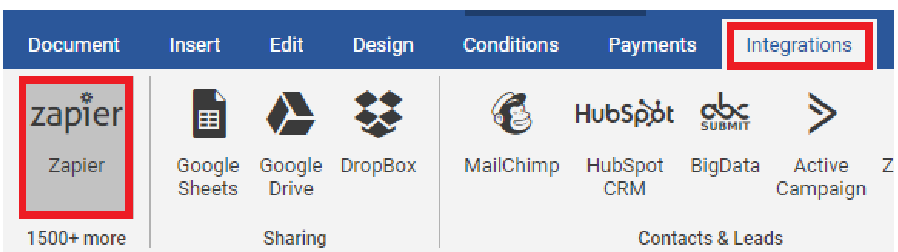
[Note] You will need a Zapier account in order to configure and enable this form integration.

By integrating your form with Zapier, you gain by far access to the most impressive collection of 3rd party platforms.

Basically, Zapier is “an integration of integrations”.

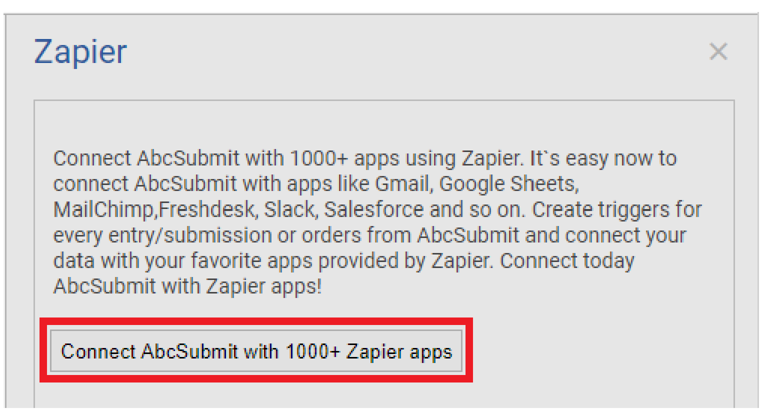
Do you want to integrate your form with an integration which is not implemented by AbcSubmit? Simple. Integrate your form with Zapier, and from Zapier you can integrate your form with that integration.

In order to integrate your form with Zapier, follow these steps:



1. **Click** on **Integrations** tab
2. **Click** on **Zapier** button

   Zapier integration configuration window will appear on the right side of your form:



3. Click “**Connect AbcSubmit with 1000+ Zapier apps**”

   A new browser tab is opened, where you are invited to login to Zapier.

[NOTE] It is important to open the link via step 3 of this tutorial, because the link contains a special parameter which enables AbcSubmit app on Zapier platform.

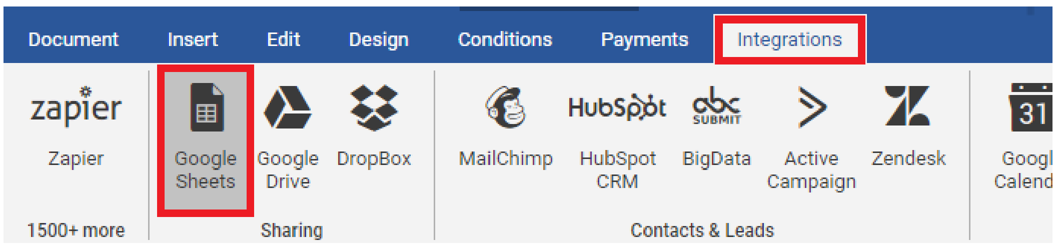
4. **On Zapier, add AbcSubmit app as initial trigger** for your new entry / submission.

   Follow instructions offered by Zapier in order to further integrate your submitted form data with other 3rd party platforms supported by Zapier.

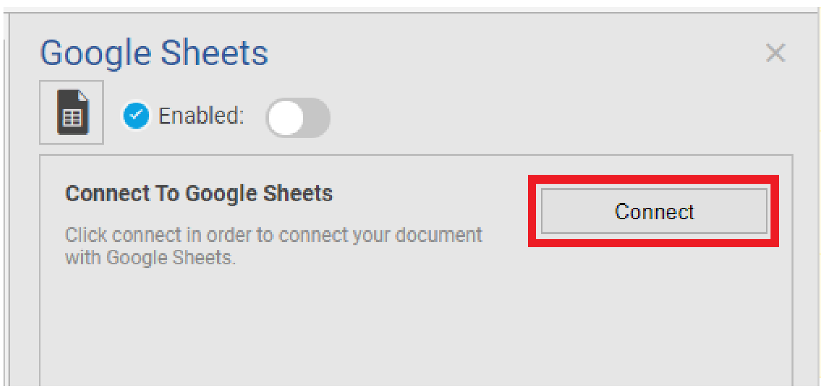
4.1.2. Google Sheets (form integration)

In order to save your form results to a Google Spreadsheet, follow these steps:

1. Click on “Integrations” tab
2. Click on “Google Sheets”

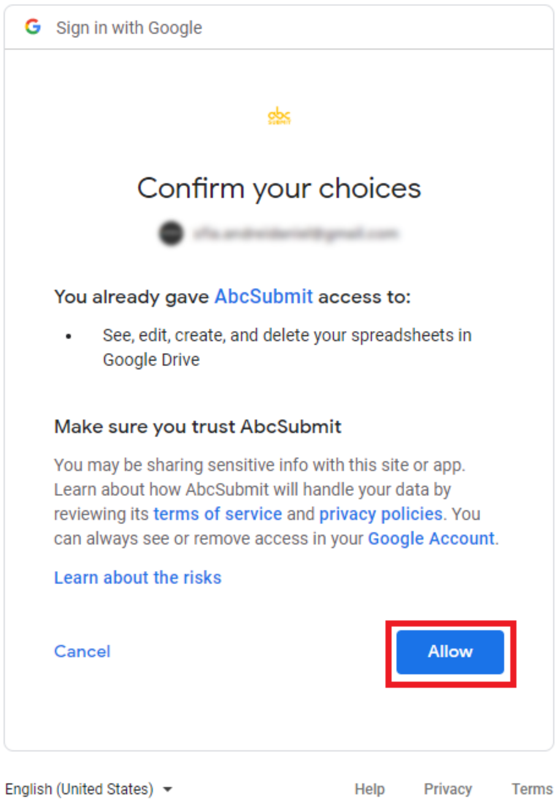


3. **Google Sheets integration window will appear** in the right side of your form:



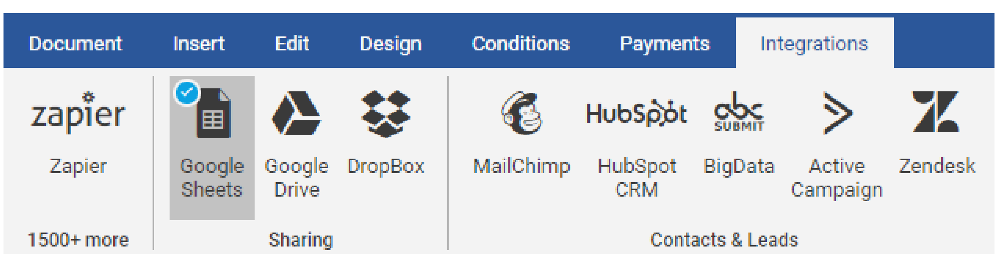
4. Click on “**Connect**” button.
5. **If you are using multiple Google accounts, a popup window will appear** from Google where you can select the Google Drive account to be used when writing in your Google Sheets file.

6. **Authorize AbcSubmit** to create spreadsheets inside your Google Drive storage, by clicking **Allow**:



7. **Click on “Enabled”** switch, in order to enable and save integration settings:

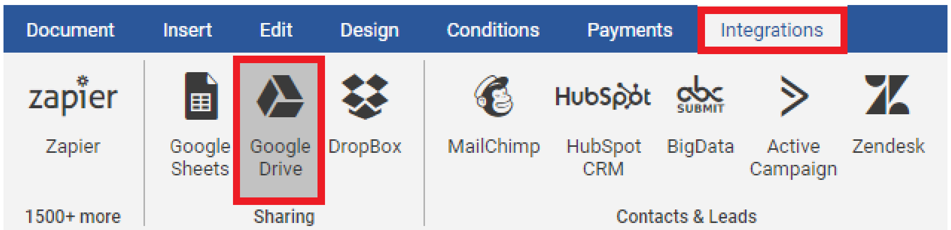
After you successfully configured and enable Google Sheets, **your integration will appear as enabled**:



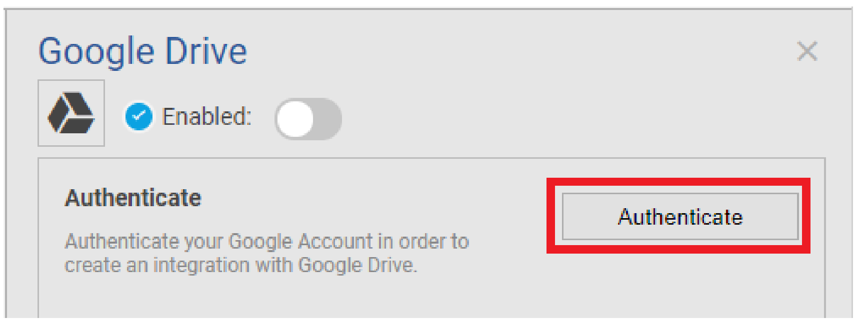
4.1.3. Google Drive (form integration)

In order to upload your form submitted files to your Google Drive storage, follow these steps:

1. Click on **Integrations** tab
2. Click on **Google Drive** button:

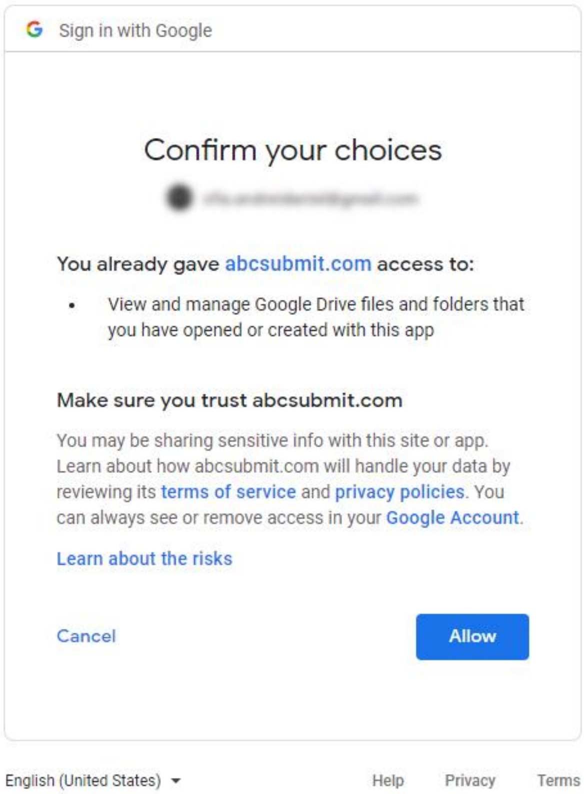


3. Google Drive integration configuration window will appear in the right side of your form:

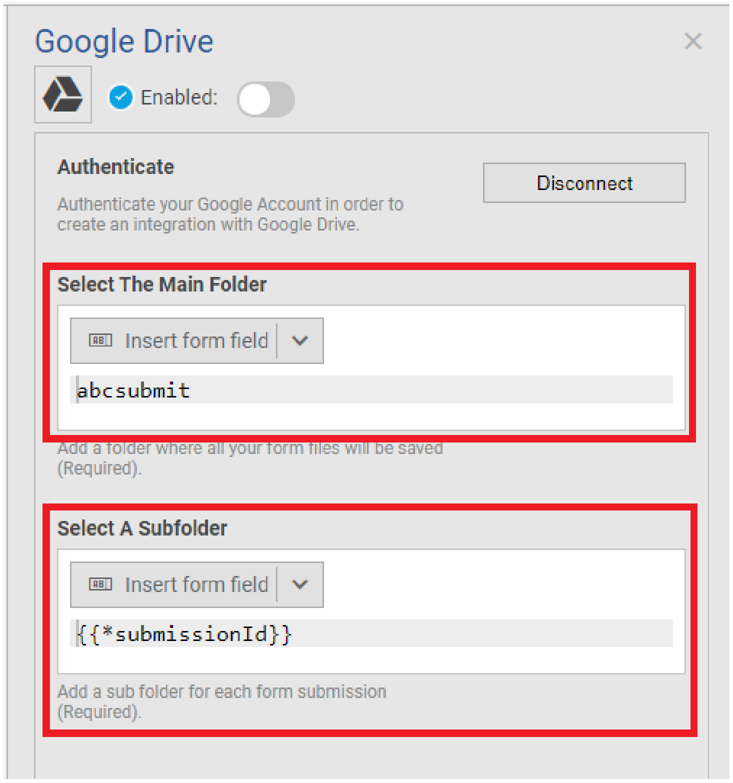


4. Click on button "Authenticate" in order to authorize AbcSubmit to upload files to your Google Drive storage
5. **If you are using multiple Google accounts, a popup screen will appear** from Google from where you can select the Google Drive account which will be used to store your form uploaded files

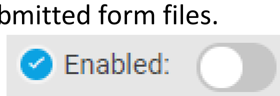
6. Authorize access of AbcSubmit on your Google Drive storage:



7. **After** the **authentication and authorization** is completed on Google, **additional settings of your integration are available**:

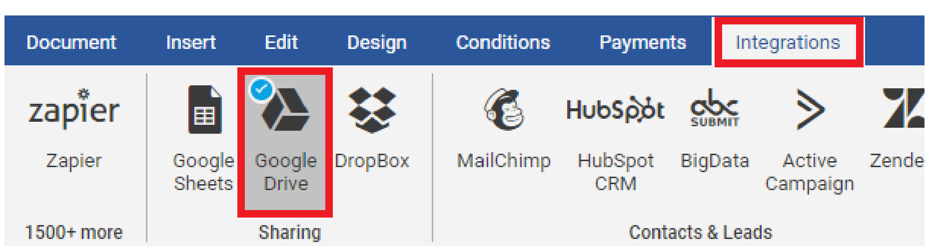


[HINT]: By default, your form submitted files will be uploaded in Google Drive folder "<main_folder>/<subfolder>", where <subfolder> represents the ID of the submitted form result.

8. **Optionally**, modify `**Select the Main Folder**` field in which your submitted form files will be uploaded
9. **Optionally**, modify `**Select a Subfolder**` field (inside the *main folder*) where you want to upload your submitted form files.
10. Click on 

, in order to save and activate your Google Drive integration.

If all above steps are performed without error, your Google Drive integration button will appear in "enabled" state:



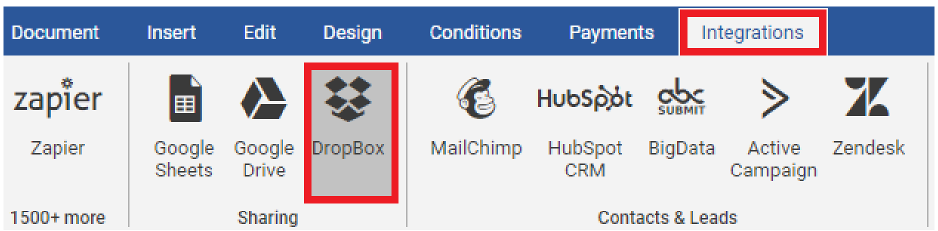
4.1.4. Dropbox (form integration)

[TIP]: In order to configure and enable your Dropbox form integration, you will first need a Dropbox account.

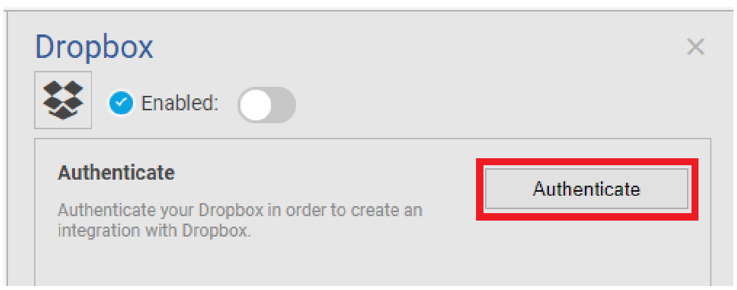
Via DropBox integration, you can save your form uploaded files to your Dropbox storage, in a folder you specify.

In order to configure your DropBox integration, follow these steps:

1. Click on **Integrations** tab
2. Click on **DropBox** button:



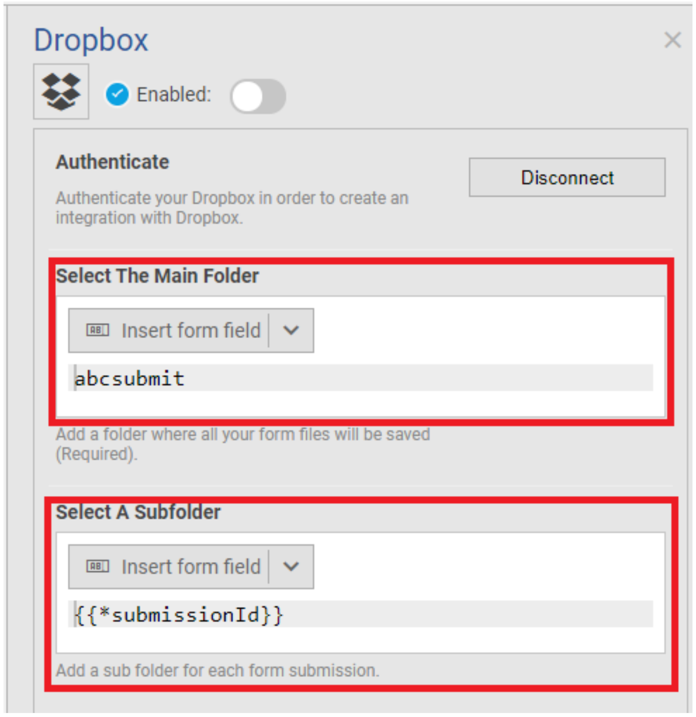
3. DropBox form integration configuration window will appear in the right side of your form



4. Click on **Authenticate** button in order to authorize AbcSubmit to connect to your Dropbox account.
5. **Complete the authentication / authorization** process for DropBox in the popup window that appears.

   Authorize AbcSubmit to access (upload) files in your DropBox account.

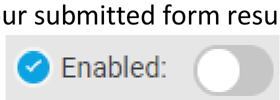
6. **Additional settings will appear** in your DropBox integration configuration window:



[TIP]: By default, your form submitted files are saved inside folder: <main_folder>/<subfolder>, where <main_folder> is "**abcsubmit**", and <subfolder> represents the ID of the received form result (submission) (**e.g.** "abcsubmit/86623/").

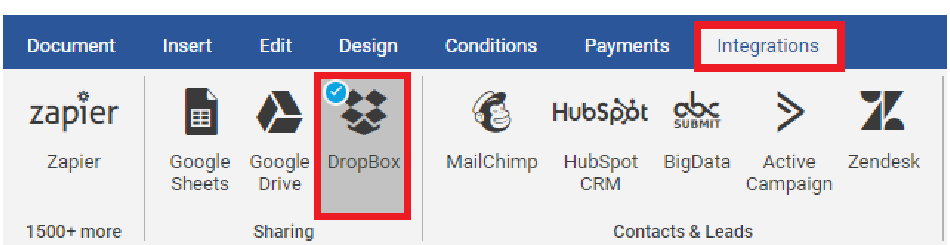
7. **Optionally**, fill the **Select the main folder** configuration field, where you want your submitted form files to be stored (this folder will appear in the root of your DropBox storage).

8. **Optionally**, fill the **Select a Subfolder** configuration field (inside the main folder) where you want your submitted form results files to be stored.

9. **Click** on 

, in order **to save and activate your DropBox integration**.

After all configuration steps are completed successfully, your DropBox integration will appear in "enabled" state inside the "Integrations" panel:



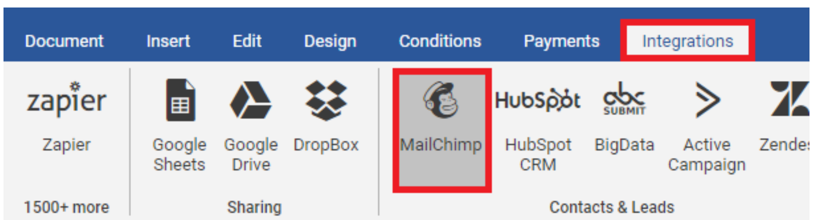
4.1.5. MailChimp (form integration)

[NOTE]: In order to collect contacts with the help of your AbcSubmit MailChimp integration, you will first need a MailChimp account.

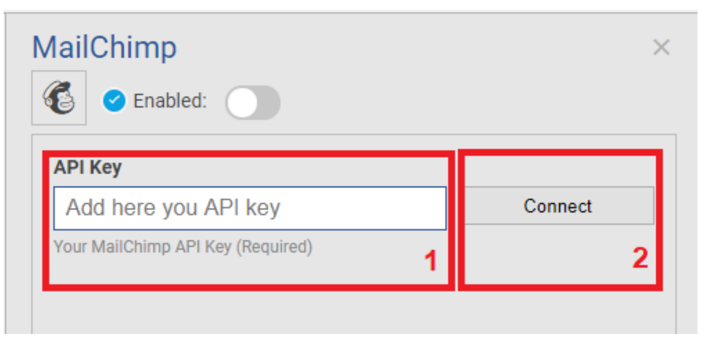
With the help of **MailChimp integration**, you can **store submitted form contacts** straight **in**side **your MailChimp account**, in order to **send newsletters** later to your collected form **contacts**.

In order to enable MailChimp integration, please follow these steps:

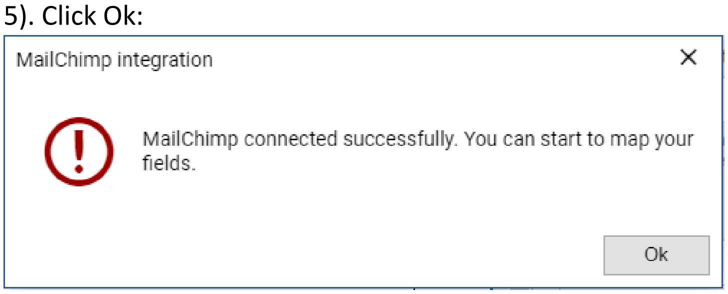
1. Click on Integrations tab
2. Click on MailChimp button:



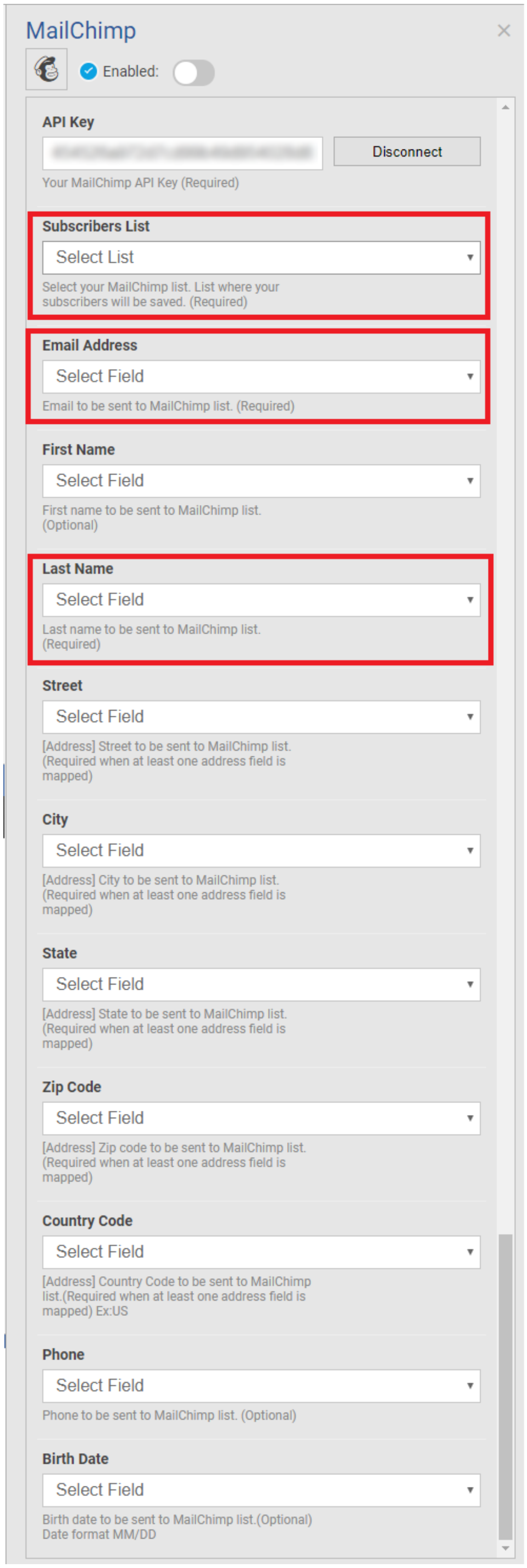
3. MailChimp configuration window will appear in the right side of your form:



4. Paste your MailChimp API key in field “API Key”
5. Click “Connect button”
6. A message informing you that MailChimp API key is valid appears after you click Connect (in step 5). Click Ok:

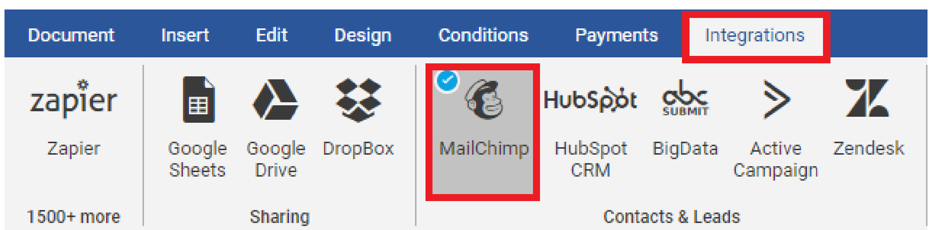


7. Contents of MailChimp configuration is updated:



8. Select the list of subscribers from MailChimp where you want your form contacts to be saved, by choosing a value from dropdown "**Subscribers List**"
9. Select the field which collects the email address from your form, by choosing a value from dropdown "**Email Address**".
10. Select the field from your form which collects the last name you wish to save into your MailChimp list, from field "**Last Name**".
11. Optional. Map remaining form fields with the fields required by MailChimp (First Name, Street, City, State, Zip Code, Country Code, Phone, Birth Date)
12. Click on "Enabled" in order to save and activate MailChimp:

After performing all steps of this tutorial, if everything went well, your **MailChimp integration will be displayed as "active"** in the **Integrations** tab:



4.1.6. HubSpot CRM (form integration)

[Note]: You will need a HubSpot CRM account at the moment you configure HubSpot CRM integration.

[Note]: HubSpot will **require some form fields to be added in your form**, providing the necessary information of the contact you wish to save on their platform.

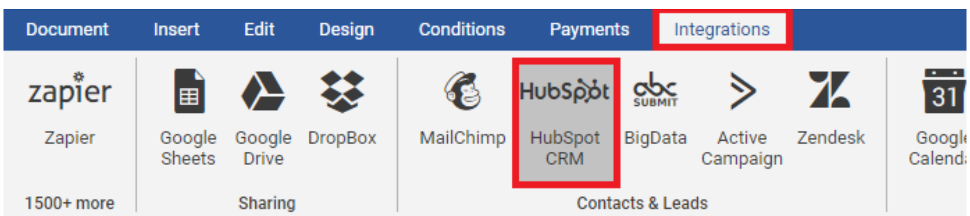
HubSpot CRM helps you to easy track from a single place, every detail of your business relationships:

- manage your entire sales pipeline
- organize and respond to all your customer support issues.

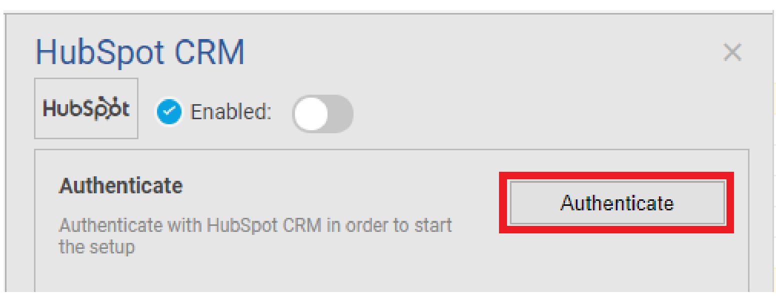
AbcSubmit helps you to save on HubSpot CRM all contact details collected with your form.

In order to save your form collected contact details to HubSpot CRM, please follow these steps:

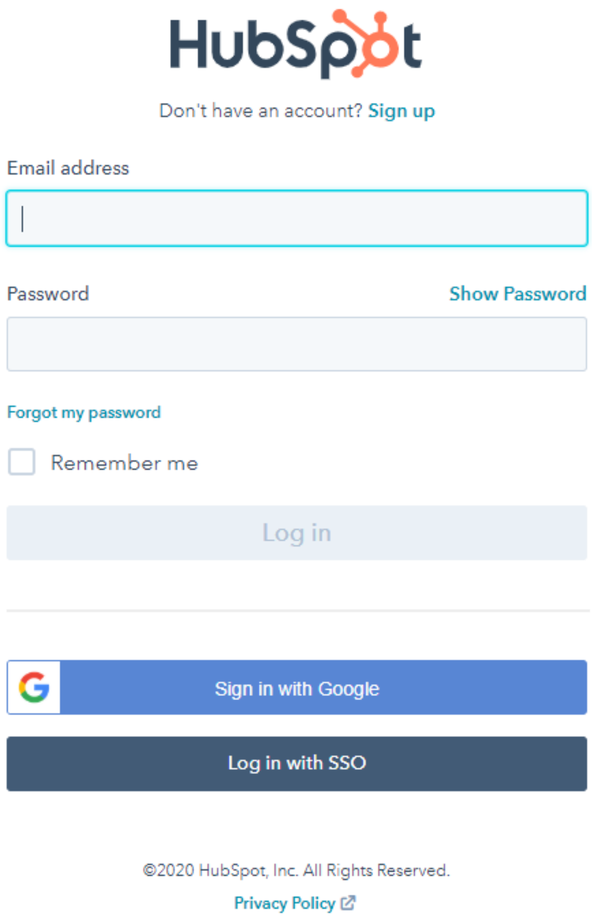
1. **Click** on "**Integrations**" tab
2. **Click** on "**HubSpot CRM**" button:



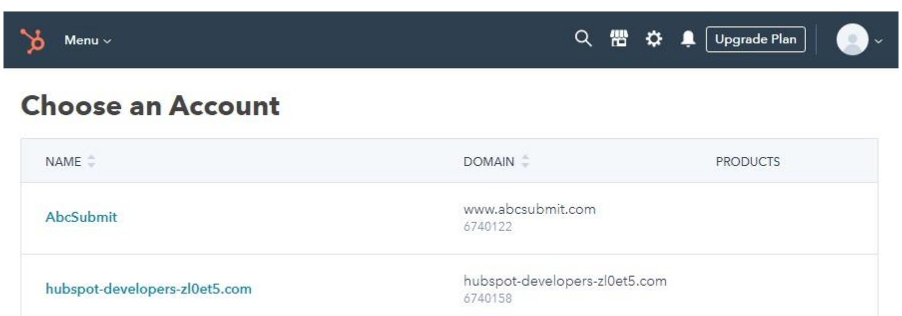
3. **HubSpot** CRM **configuration window will appear** in the right side of your form:



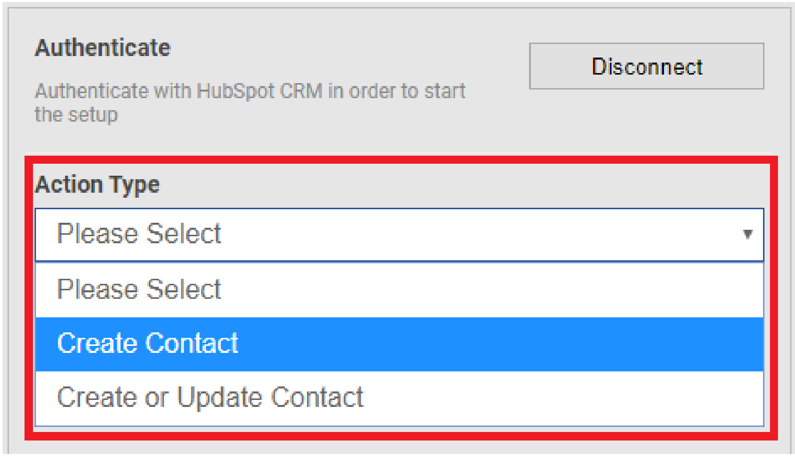
4. **Click** on "**Authenticate**" button. A new window will appear on your screen, prompting you to authenticate on HubSpot:



5. **If HubSpot prompts you** to choose your account to connect your form with, **select appropriate account**:



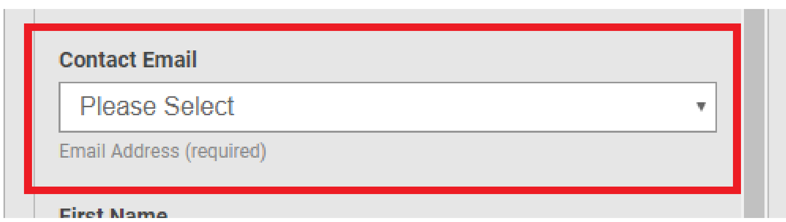
6. Your **HubSpot** CRM **configuration window is updated**, containing more settings you can configure:



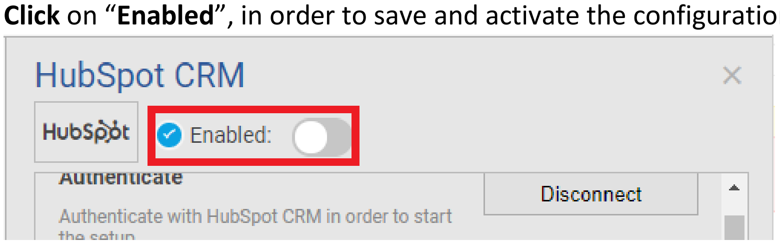
7. Choose the type of action you want your HubSpot CRM integration to perform, by **select**ing it from dropdown "**Action Type**"

   After selecting the "Action Type" of the HubSpot CRM integration, **additional fields can be configured**.

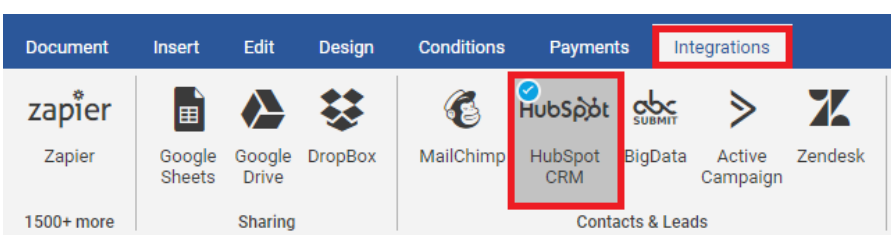
8. Select the corresponding field on your form which holds the **"Contact Email"** required by HubSpot:



9. **Optional step**: Map the rest of required HubSpot integration fields with the fields on your form
10. **Click** on "**Enabled**", in order to save and activate the configuration of your HubSpot integration:



After all steps of this tutorial are completed successfully, **your HubSpot integration will be listed as "enabled" in your Integrations tab**:



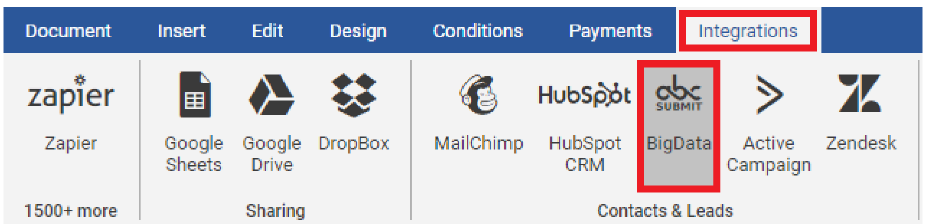
4.1.7. BigData (form integration)

Author of BigData integration: AbcSubmit.

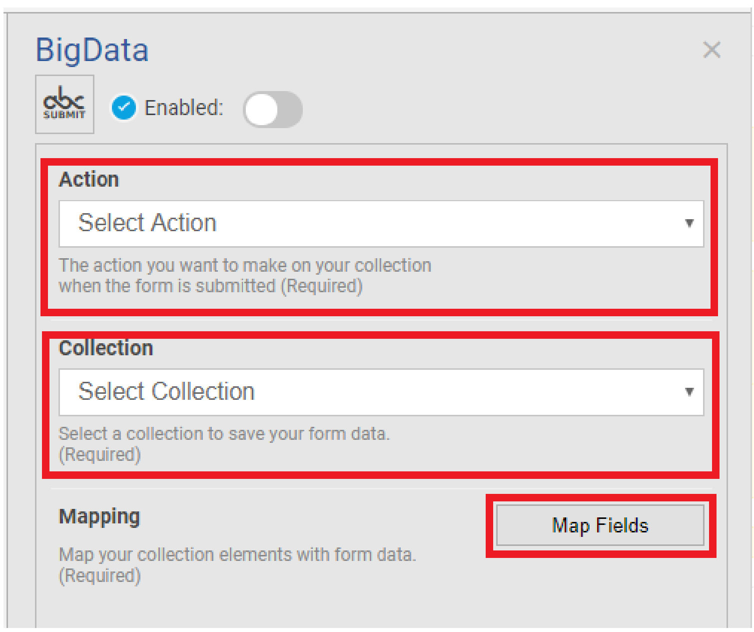
BigData integration helps you to **update / insert** your form **submitted results into a BigData collection**.

In order to configure your BigData integration, please follow these steps:

1. Click on “Integrations” tab
2. Click on “BigData” button:



3. AbcSubmit BigData integration configuration window will appear in the right side of your form:



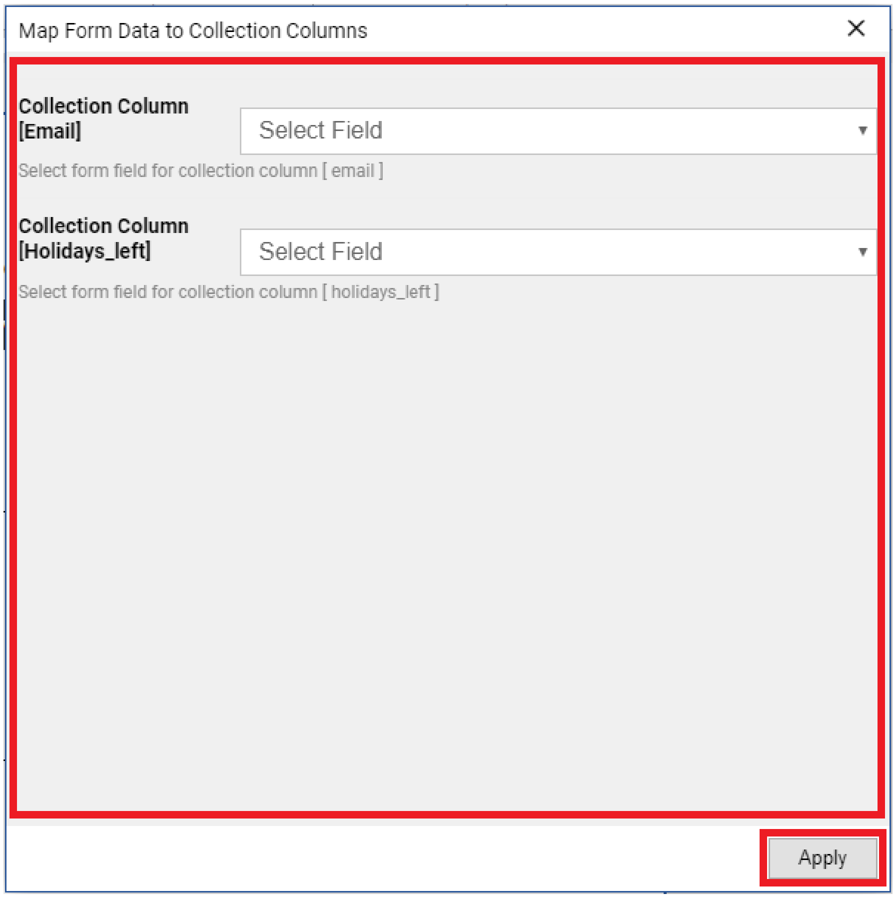
4. **Select** an **Action** (Insert or Upsert) which you want to be performed by your integration

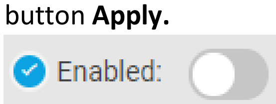
   Choose “Insert” action **if you want to add a new row in your collection**.

   Upsert action **behaves like this**: **First we try to insert** a new row in collection. **If data cannot**

be inserted because of a unique field (data already exists), then **row gets updated** instead.

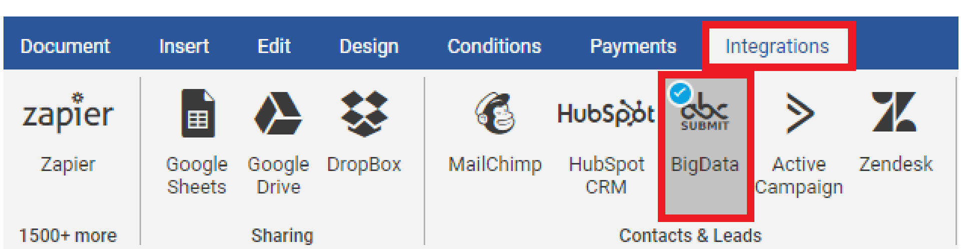
5. **Select** a BigData **collection** on which your selected actin will be performed
6. **Click** on button “**Map Fields**”. A window will open, containing each collection field that you can map to a field of your form:



7. **For each field of collection** you want to Insert or Upsert, **select a field from your form**
8. **Click** button **Apply.**
9. **Click** 

in order to save and activate your integration.

After all steps are completed, your BigData integration will appear as configured and enabled:



4.1.8. ActiveCampaign (form integration)

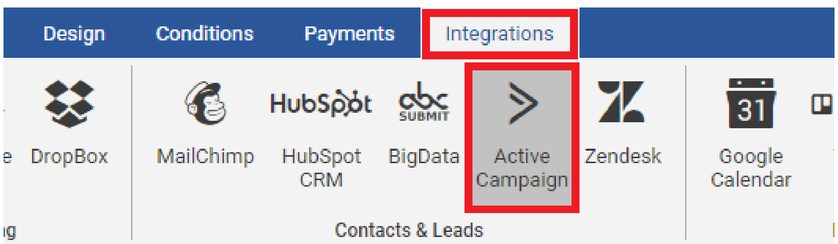
[Note]: You will need an ActiveCampaign account in order to configure and enable this integration.

ActiveCampaign gives you the email marketing, marketing automation, and CRM tools you need to create great customer experiences.

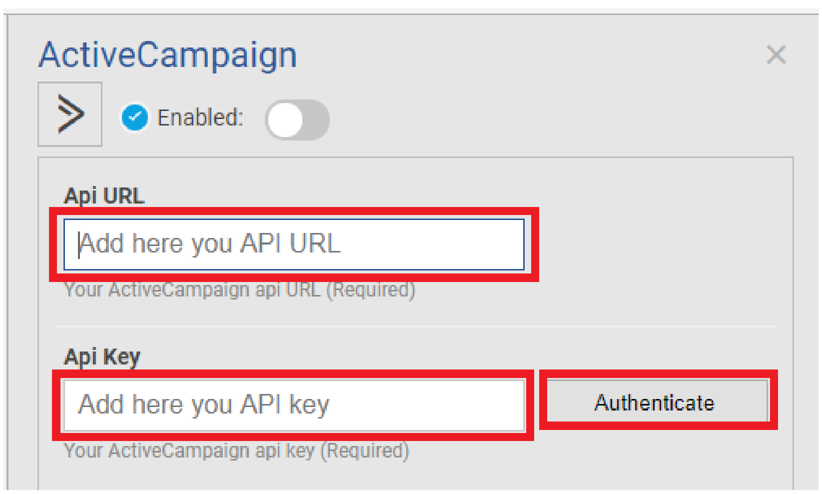
> [**Note**]: **Jose Rebelato from ActiveCampaign** offered to help you if you encounter any difficulties on ActiveCampaign. You can drop him at email, at jrebelato@activecampaign.com.

In order to configure and enable your ActiveCampaign integration, please follow these steps:

1. **Click** on **Payments** tab
2. **Click** on **ActiveCampaign** button:

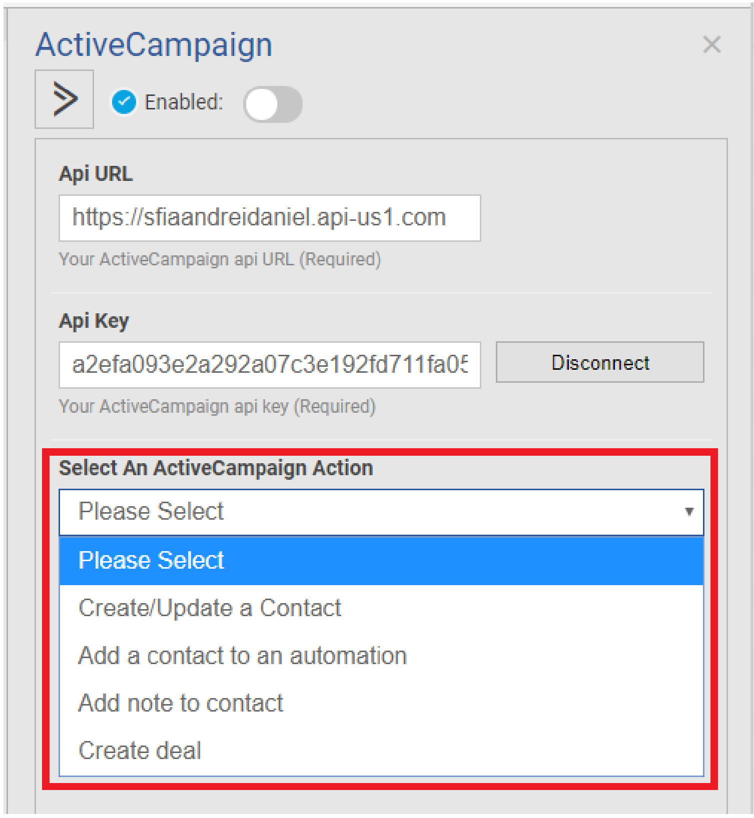


3. ActiveCampaign configuration window will appear in the right side of your form:



4. **In your ActiveCampaign account**, navigate to Settings -> Developer. **Copy** from there the **Url** and **Key**.
5. **Fill** the "**Api URL**" setting copied from step 4
6. **Fill** the "**Api Key**" setting copied from step 4
7. **Click** on button **Authenticate**

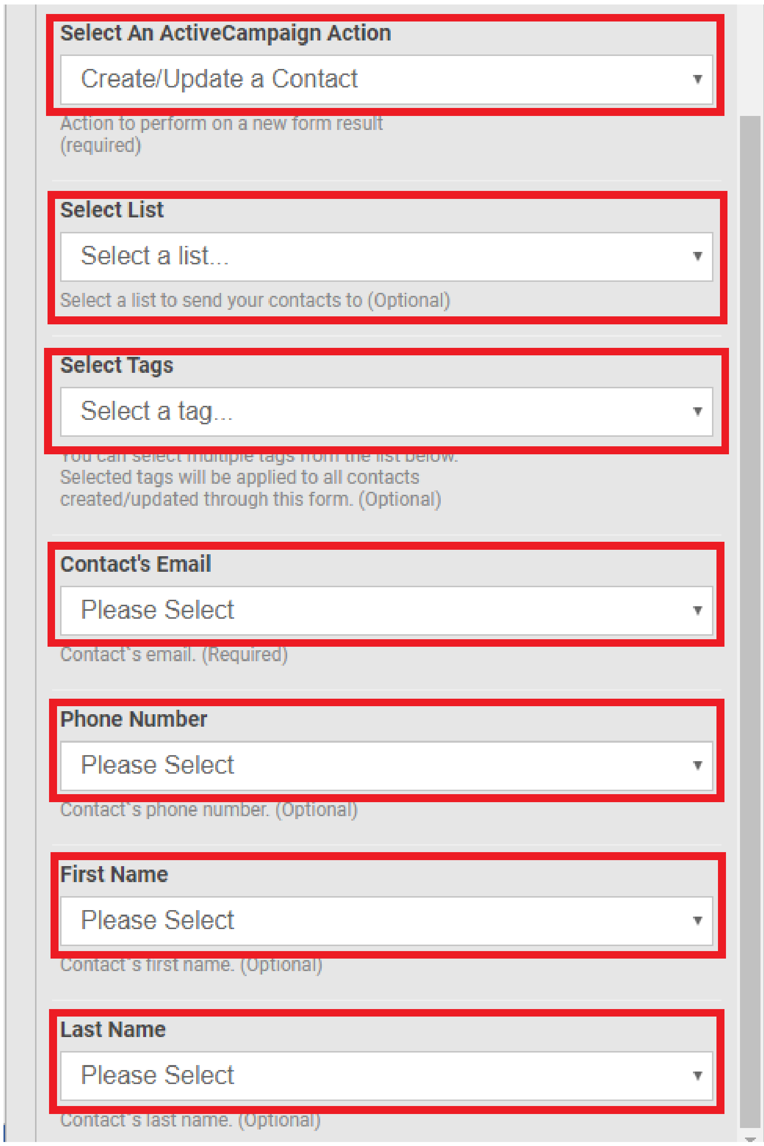
ActiveCampaign configuration window will be updated:



8. **Select the action you want to perform** via your ActiveCampaign integration (**click** on "**Select An ActiveCampaign Action**").

   Please follows steps described below **corresponding for selected action:**

8.1. **When** selected **action is** “**Create/Update a Contact**”:



By using this action, you can add or update a contact, it’s details and tags to one of your ActiveCampaign contact lists:

8.1.1. **Select the list where you want your contact details to be saved** / updated (from “**Select List**” dropdown).

8.1.2. **Optionally**, you can **select a tag which will be associated to your contact** (from “**Select Tags**” dropdown)

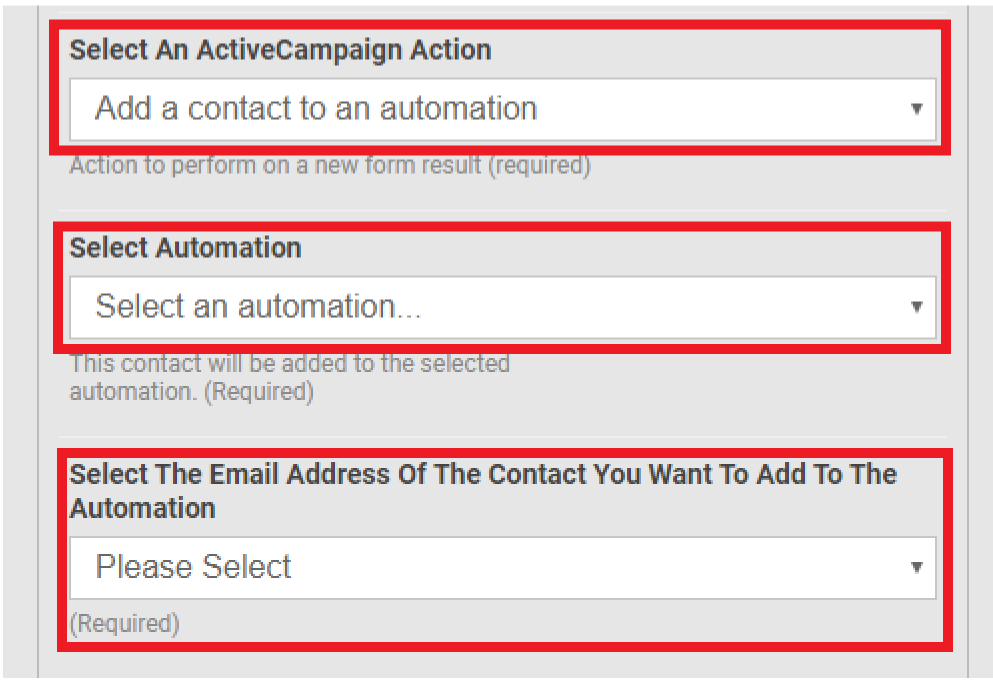
8.1.3. **Select** the **field** from the form **which contains the email of your contact** (from “**Contact’s Email**” dropdown).

8.1.4. **Optionally**, **select** the **field** from the form **which contains the phone number of your contact** (from “**Phone number**” dropdown).

8.1.5. Optionally, select the field from your form which contains the first name of your contact (from “First Name” dropdown)

8.1.6. Optionally, select the field from your form which contains the last name of your contact (from “Last Name” dropdown).

8.2. **When** selected **action is** “**Add a contact to an automation**”:

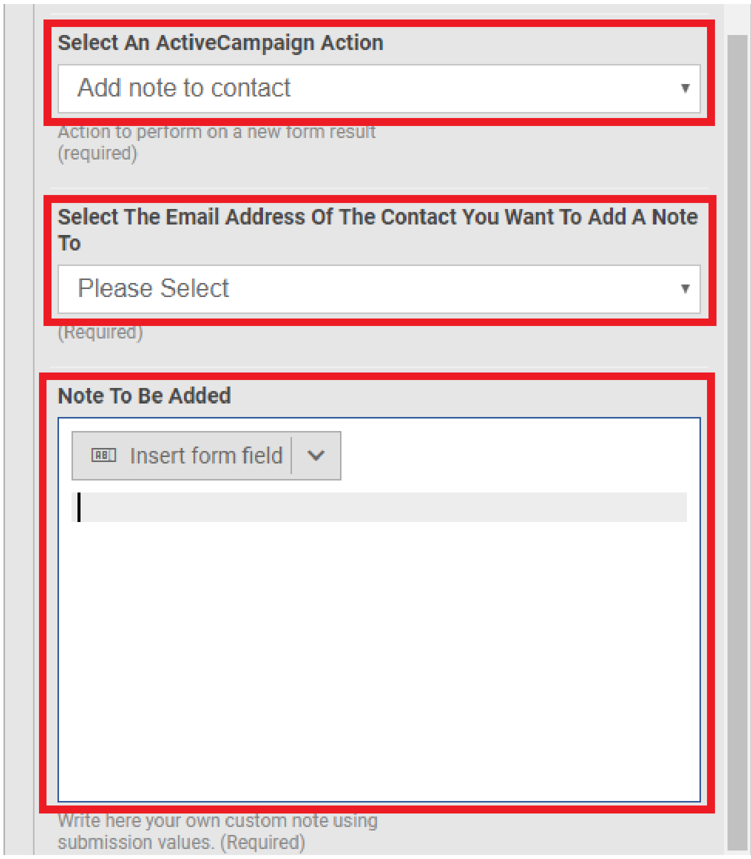


By using this action, you can add a contact from a form field to an automation from your ActiveCampaign account.

8.2.1. **Select the automation** in which your contact will be added (from **Select Automation**)

8.2.2. **Select** the **field** of your form **containing the email address of your contact** which will be added to your automation (**Select The Email Address Of The Contact You Want To Add To The Automation**)

8.3. **When** selected **action is** "**Add note to a contact**":

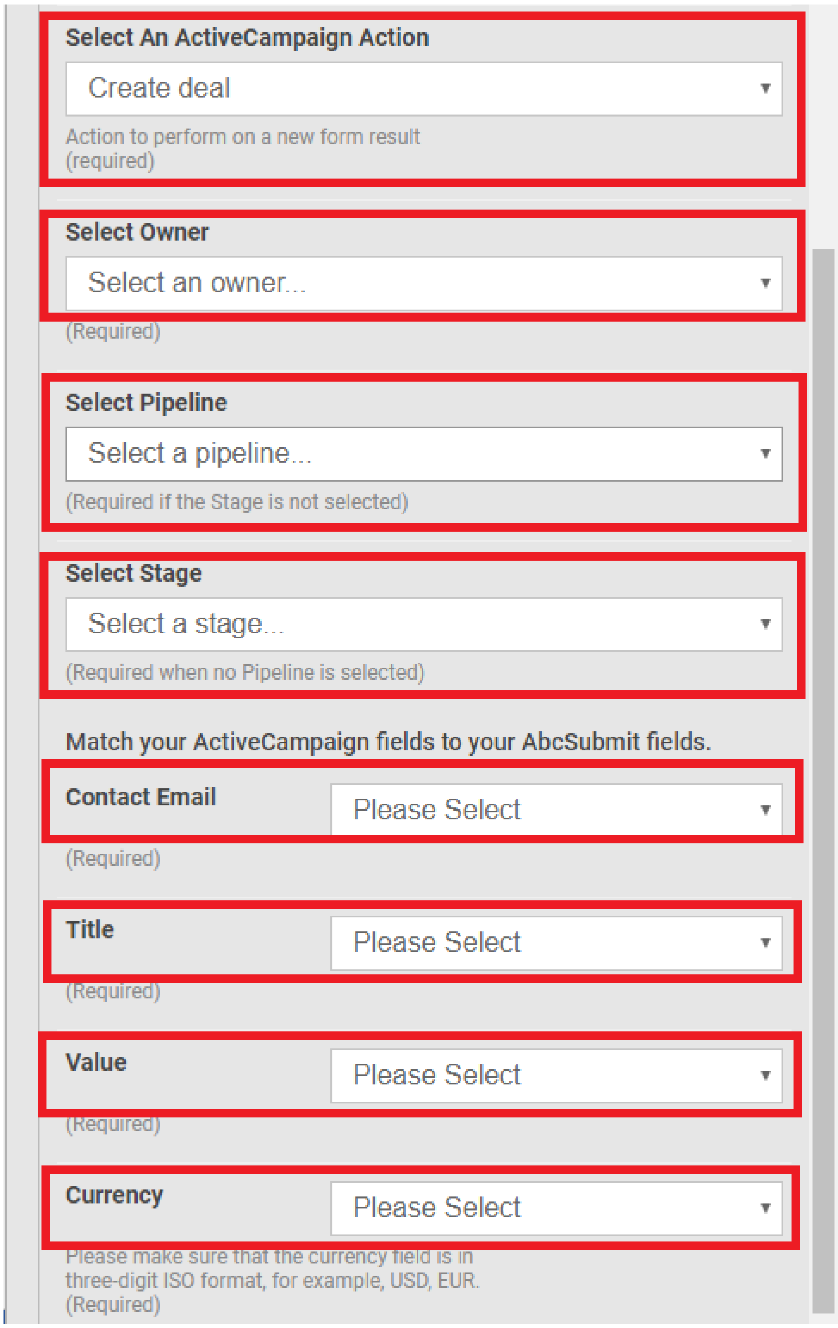


By using this action, you can add a note to an existing ActiveCampaign contact.

8.3.1. **Select** the **field** from the form **containing the email address of the contact** (from "**Select The Email Address Of The Contact You Want To Add A Note**" dropdown)

8.3.2. **Write the note** to be **added to your contact** (inside "**Note To Be Added"** field).

8.4. **When** selected **action is “Create deal”**:



By using this option, you can create a new deal in your ActiveCampaign account for a customer collected with your form:

8.4.1. **Select the owner of the deal** (from “**Select Owner**” dropdown) from your ActiveCampaign account

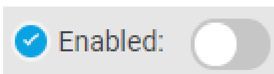
8.4.2. **Select a Pipeline** (from “**Select Pipeline**” dropdown) **or a Stage** (from “**Select State**” dropdown)

8.4.3. **Select** the **field** from your form **corresponding to the contact email address** (from "**Contact Email**" dropdown).

8.4.4. **Select** the **field** from your form **corresponding to the title of the deal** (from "**Title**" dropdown).

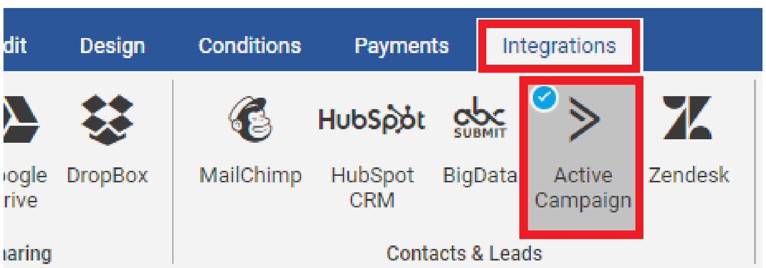
8.4.5. **Select** the **field** from your form **corresponding to the value of the deal** (from "**Value**" dropdown).

8.4.6. **Select** the **field** from your form **corresponding to the currency** of the deal value (from "**Currency**" dropdown).

9. **Click** on 

in order **to save and activate your integration**.

After all steps are completed, your ActiveCampaign integration will be displayed as enabled and configured:



4.1.9. Zendesk (form integration)

[Note]: In order to successfully configure and enable Zendesk integration, you will need a ZenDesk account first.

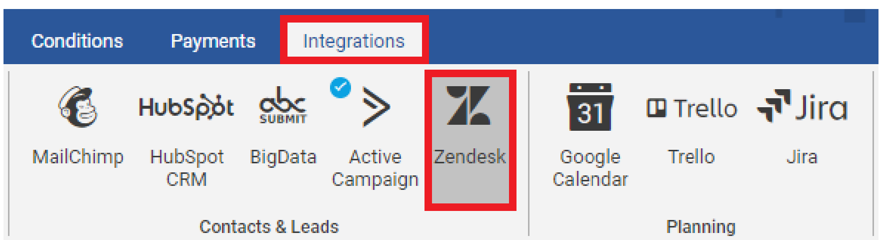
Zendesk is a support ticketing system focused on managing customers and answering the questions asked by your business customers.

With the help of AbcSubmit Zendesk integration, you can:

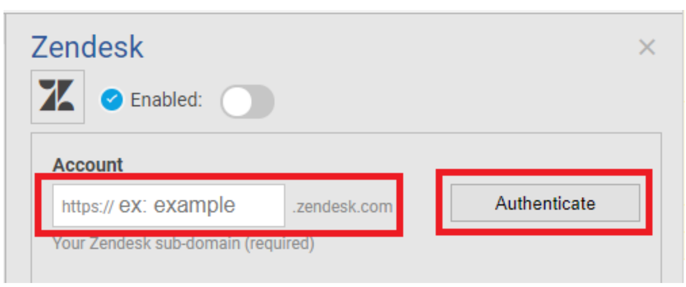
- manage and respond to individuals (customers) which asked any questions in your contact / support forms, by creating new tickets for follow up in ZenDesk
- create companies and users in your ZenDesk account.

In order to configure your Zendesk integration, please follow these steps:

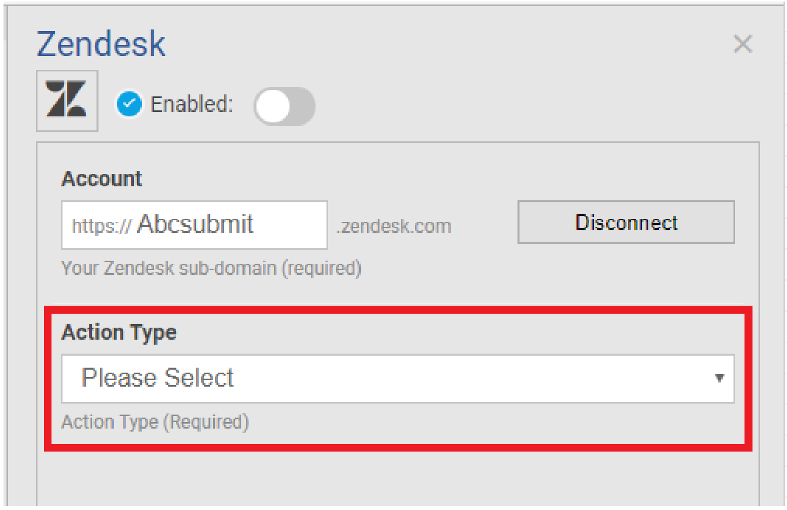
1. **Click** on **Integrations** tab
2. **Click** on **Zendesk** button:



3. Zendesk integration **configuration window will appear** on the right side of your form:



4. **Input** your **Zendesk subdomain**, by typing it **inside** your "**Account**" field (e.g.: "Abcsubmit")
5. Click on **Authenticate** button
6. A **popup screen might appear** (if you are signed out from Zendesk), prompting for your Zendesk username and password. **Click on "Login"**.
7. After Zendesk authentication is performed successfully, **your Zendesk configuration window will look like this**:

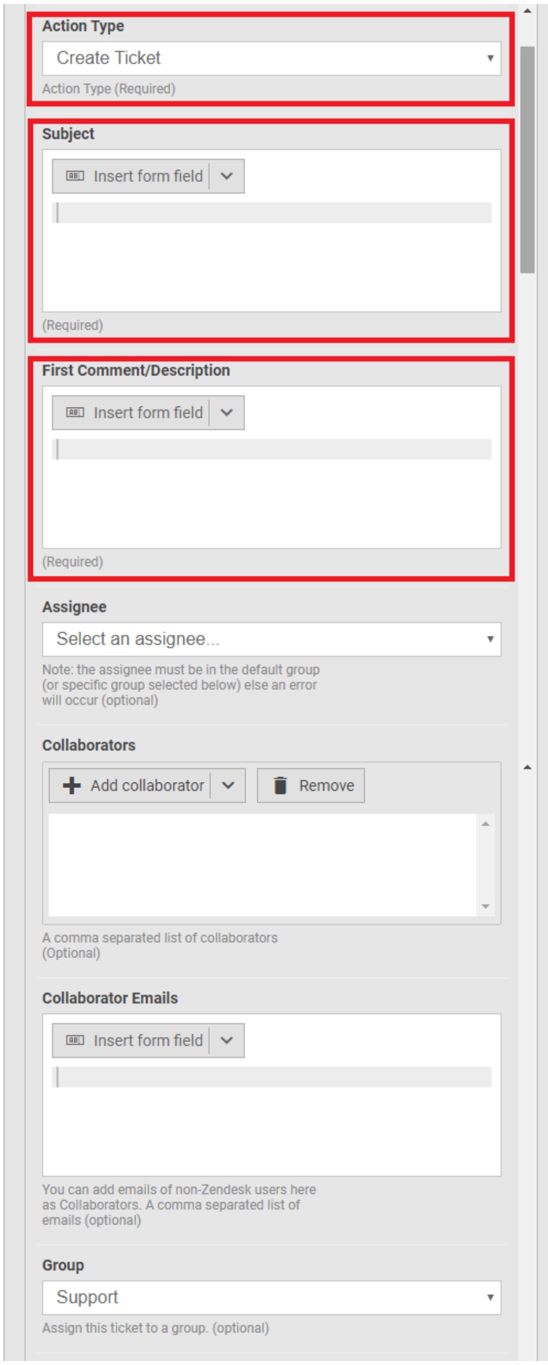


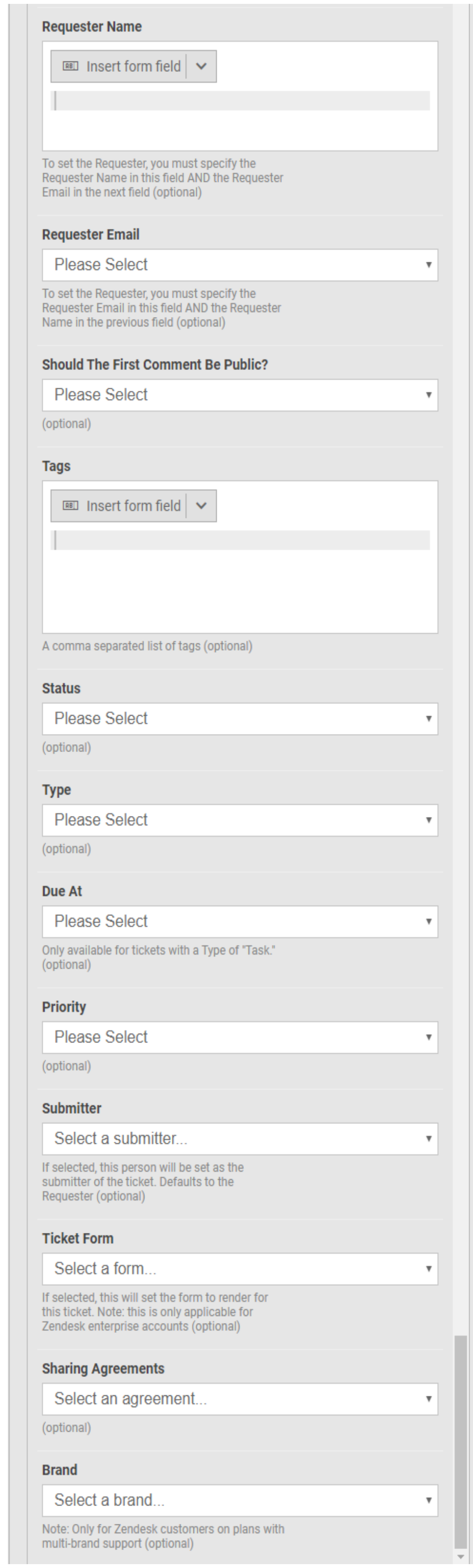
8. **Select the action you want to perform** with your Zendesk integration (**from "Action Type"** dropdown).

   Depending on the action you choose, please follow the corresponding sub-step.

8.1. When "Action Type" is "Create Ticket":

You can create a new ticket in Zendesk, by providing minimum two settings: **Subject** and **First Comment / Description**. The **rest of the fields are optional**, and should be filled only if needed:





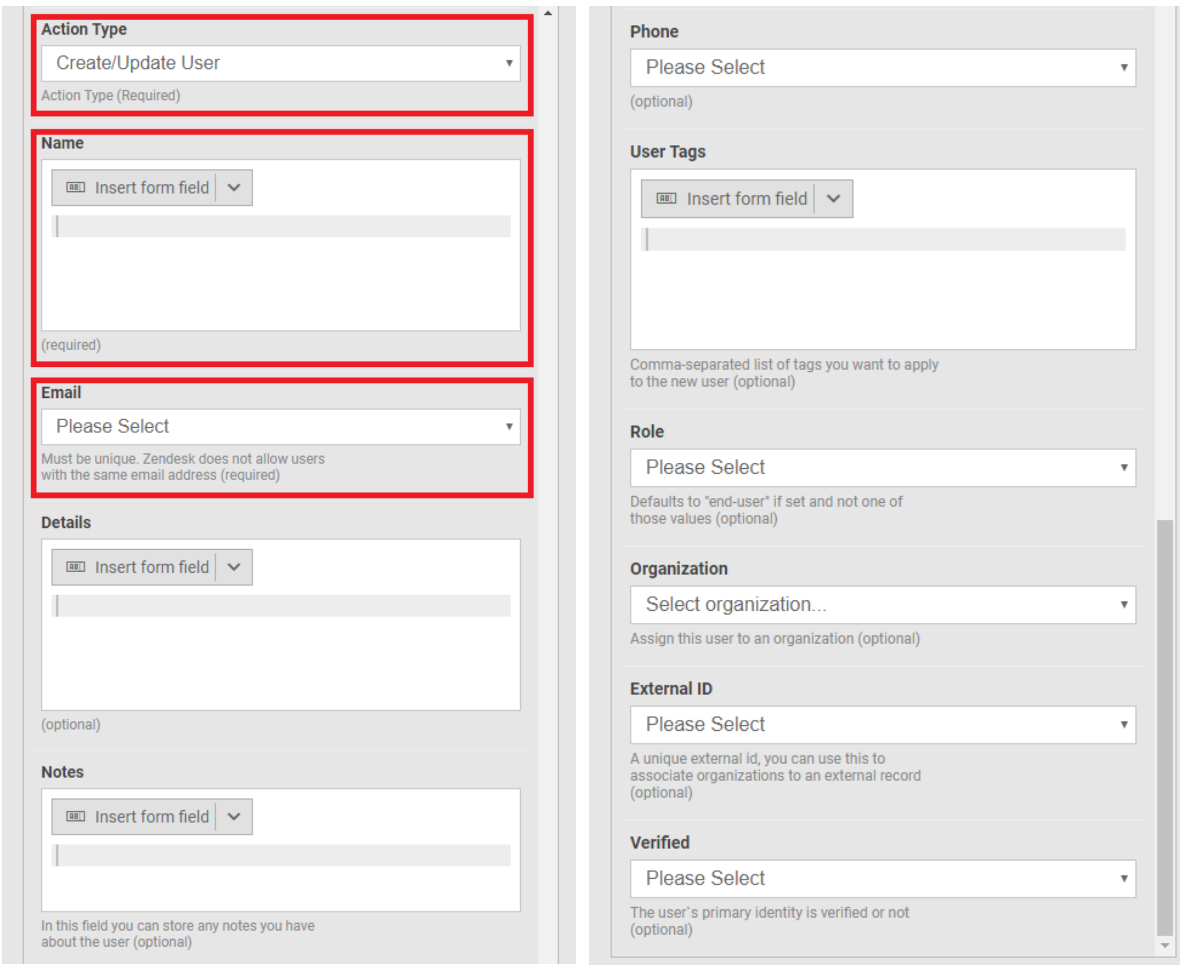
8.1.1. **Fill** the **Subject** of the ticket (from field "**Subject**")

8.1.2. **Fill** the **Description** of the ticket (from field "**First Comment / Description**")

8.1.3. **Optional** step: **Fill optional fields** (“Assignee”, “Collaborators”, “Collaborator Emails”, “Group”, “Requester Name”, “Requester Email”, “Should The First Comment Be Public”, “Tags”, “Status”, “Type”, “Due At”, “Priority”, “Submitter”, “Ticket Form”, “Sharing Agreements” and “Brand”).

8.2. When action type is “Create / Update User”:

By configuring your Zendesk integration to **perform action “Create / Update User”**, you have the ability to **add a new user** or **modify contact details of an existing user** from your Zendesk account. **Minimal settings** for this type of action are to provide an **email** and a **name** for your user you wish to update:



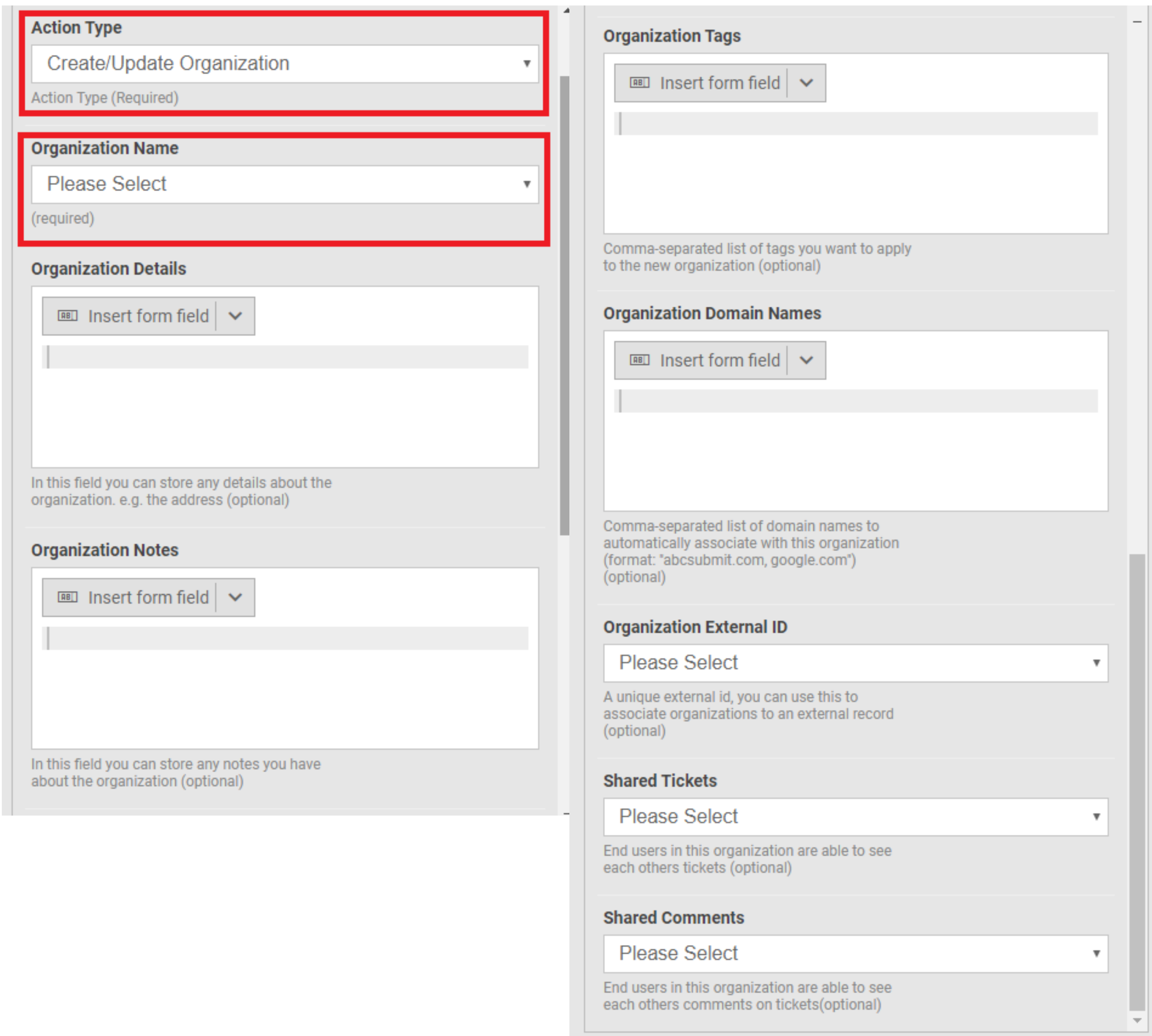
8.2.1. **Fill** the **Name** of the user (you can compose the full name of the user by injecting multiple form fields)

8.2.2. **Select** a field from your form which contains the **Email** of your user (Email setting)

8.2.3. **Optionally**, you can **fill additional user details field which you need to be saved** (“Details”, “Notes”, “Phone”, “User Tags”, “Role”, “Organization”, “External ID”, “Verified”).

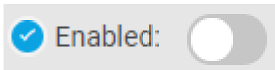
8.3. When action type is “Create/Update Organization”

Use this action in order **to add** or **update an** already existing **organization from your Zendesk account**. The minimum required configuration is to **provide the name of organization**.



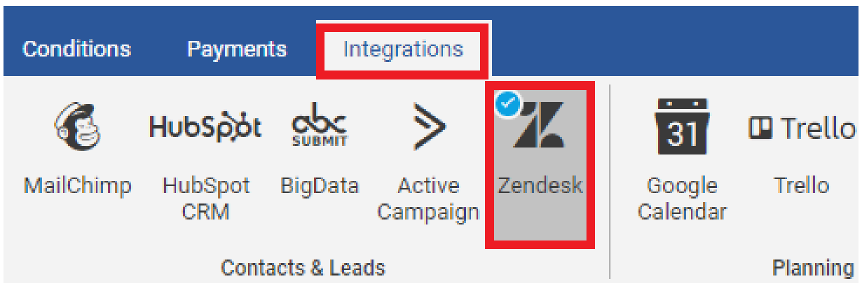
8.3.1. **Select** the **field** from your form **which contains the name of the organization** (from **Organization Name** dropdown).

8.3.2. **Optionally**, **fill** according to your needs **the fields you wish to save for your organization** (“Organization Details”, “Organization Notes”, “Organization Tags”, "Organization Domain Names", "Organization External ID", "Shared Tickets", "Shared Comments").

9. **Click** on 

, in order **to save and enable** your Zendesk **integration**.

After all steps are completed, **your Zendesk integration will appear as configured and enabled**:

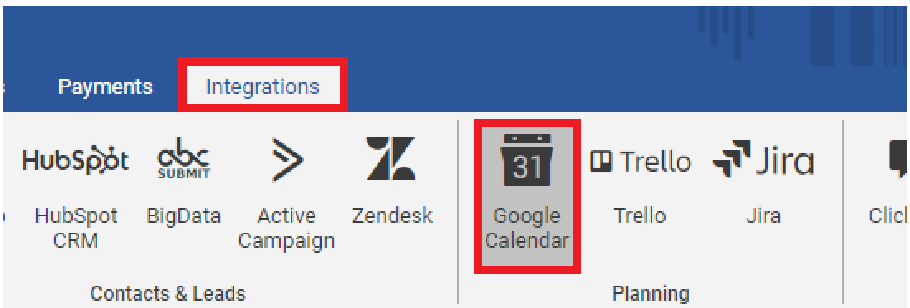


4.1.10. Google Calendar (form integration)

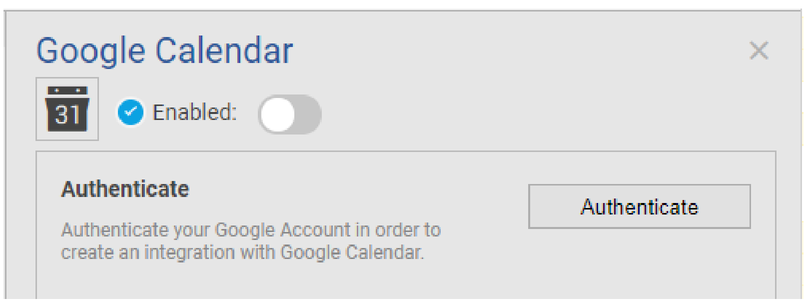
With the help of the Google Calendar integration, you can add events to your calendar from Google each time you receive a new form result.

In order to **enable and configure your Google Calendar integration**, please follow these steps:

1. **Click** on **Integrations** tab
2. **Click** on button "**Google Calendar**":

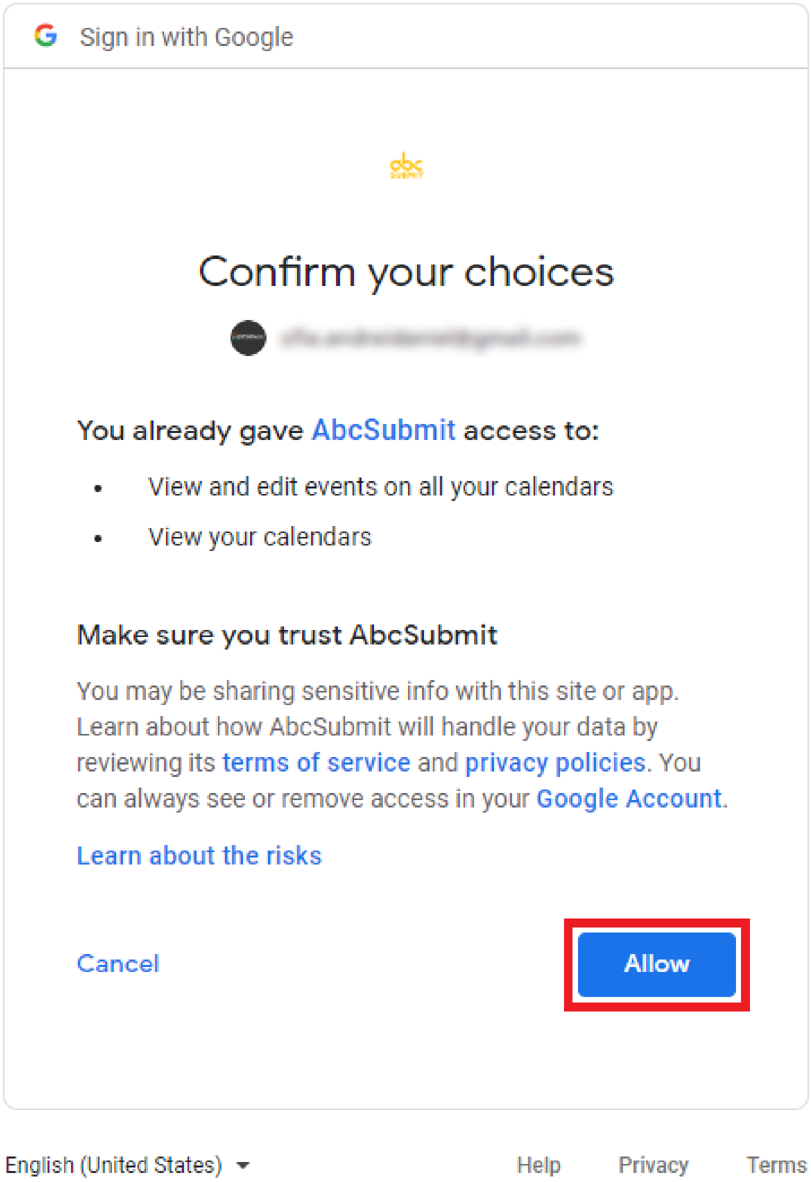


3. Your integration **configuration window for Google Calendar will appear** in the right side of your form:

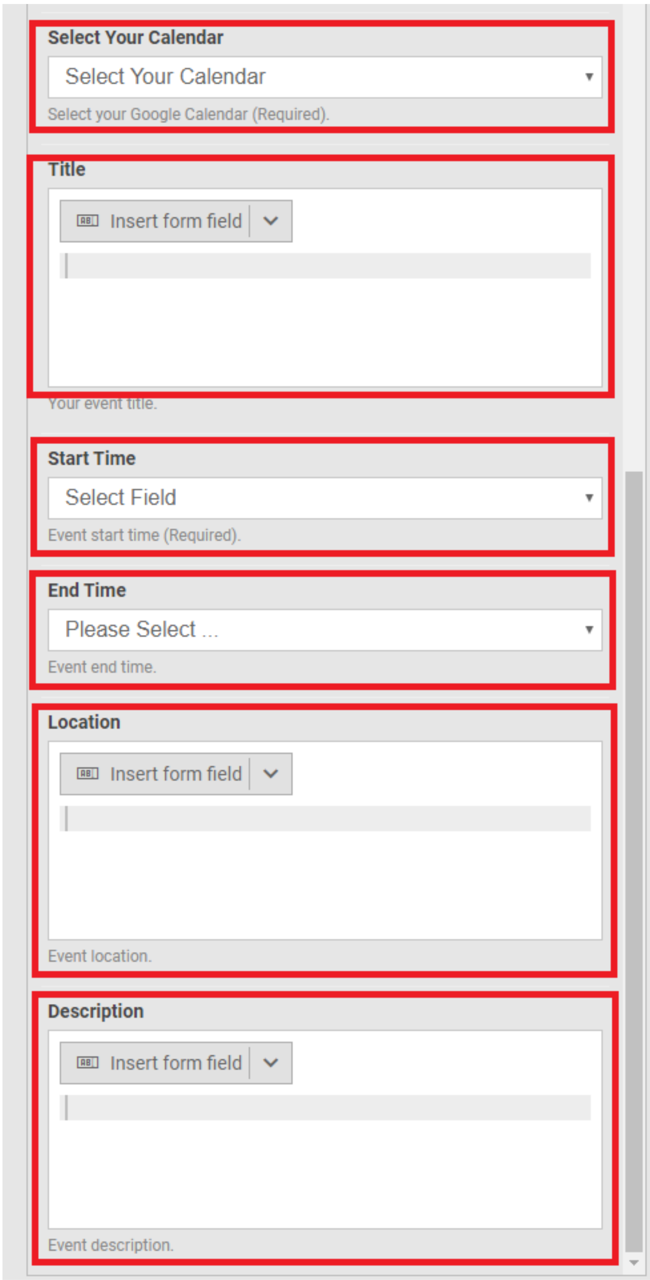


4. Click on "**Authenticate**" button.
5. **If you are using multiple Google accounts, a popup window will appear** from Google where you can select the Google Calendar account to be used when saving events generated by your form results.

6. **A popup screen will ask you if you want to allow AbcSubmit to save events in your Google Calendar account**. **Click Allow** in order to continue:



7. **After you authenticate and authorize** AbcSubmit with Google, **additional settings will appear** in configuration window of your Google Calendar integration:

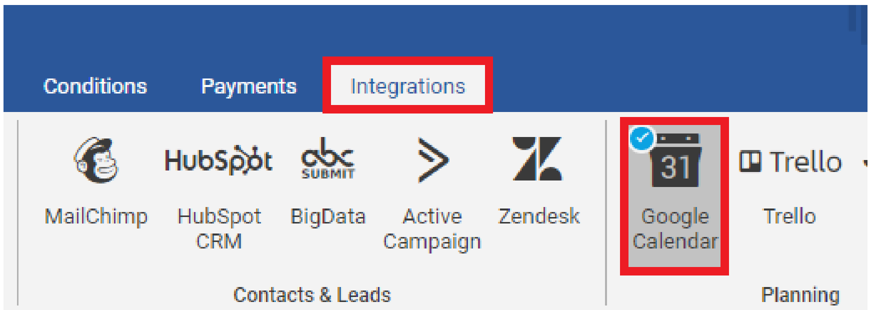


8. **Select the calendar in which new events will be created** by your form (from **Select Your Calendar** dropdown)
9. **Write a title** that will be used **for your event** (from "**Title**" field)
10. **Select the field of type date which contains the date when your event will be created** in your calendar (from **Start Time** dropdown)
11. **Select the duration of your event**, by selecting a value from "**End Time**" dropdown
12. **Write the location where the event will take place** (from **Location** field)
13. **Write a description of the event** (in **Description** field)

14. **Click** on 

in order **to save and activate your Google Calendar integration**

After all configuration steps are performed, your AbcSubmit **Google Calendar integration will appear as configured and enabled**:



4.1.11. Trello (form integration)

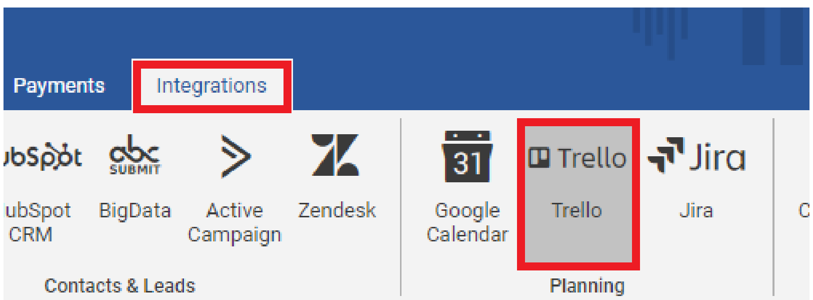
[Note]: In order to successfully configure and enable your Trello integration, you will need a Trello account first.

Trello's boards, lists, and cards enable you to organize and prioritize your projects in a fun, flexible, and rewarding way.

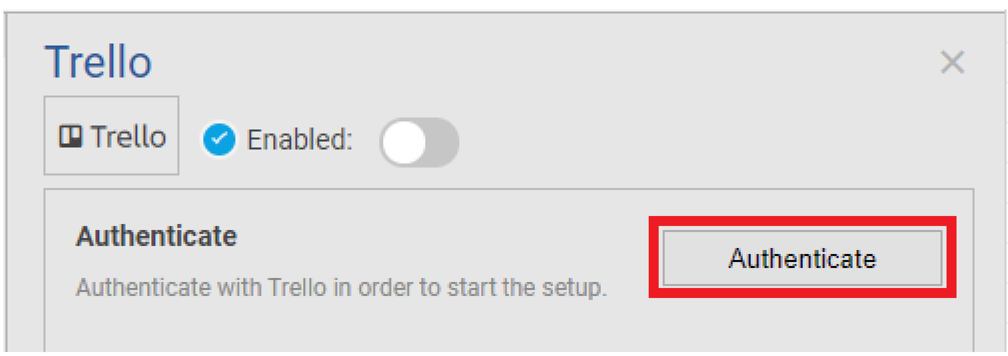
With the help of AbcSubmit Trello integration, you can create new tasks straight on your Trello boards, when a new form results is received by your form.

In order to configure and enable your AbcSubmit Trello integration, please follow these steps:

1. Click on Integrations tab
2. Click on Trello button:

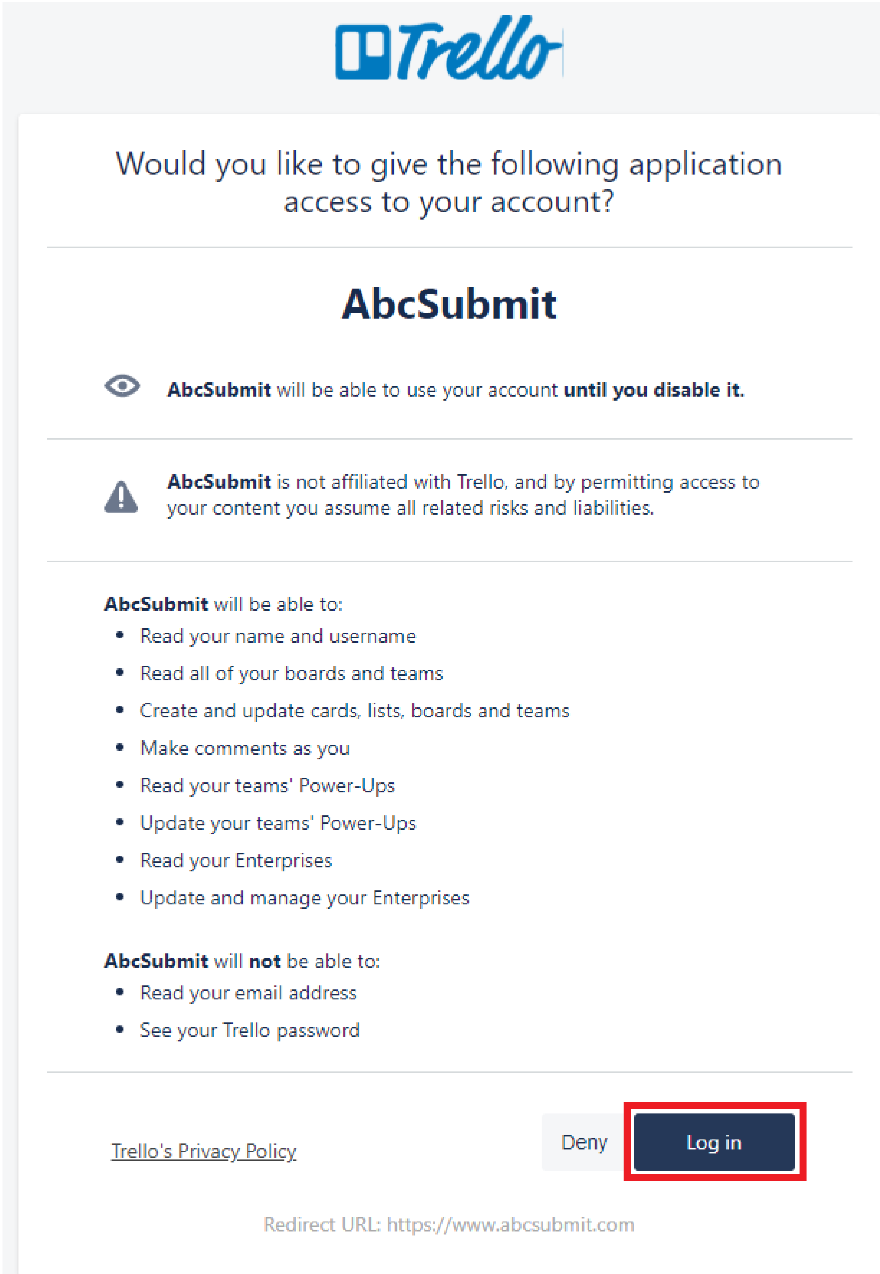


3. Trello integration configuration window will appear on the right side of your form:

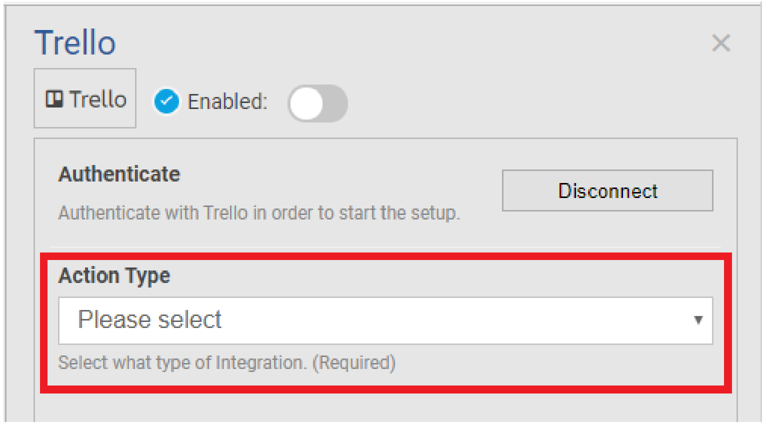


4. Click on Authenticate button, in order to start the configuration setup.

5. **A popup will appear from Trello**, informing you about the permissions you are about to grant AbcSubmit on your Trello account. **Click "Log in"** in order **to continue**:



6. **After you authorize AbcSubmit via Trello**, additional settings will appear in your Trello integration configuration window:

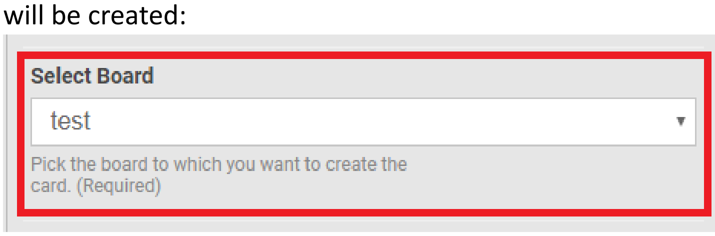


7. **Select the type of action to be performed by your Trello integration** (from the **Action Type** dropdown). Depending on the type of action you select, please follow corresponding sub-step.

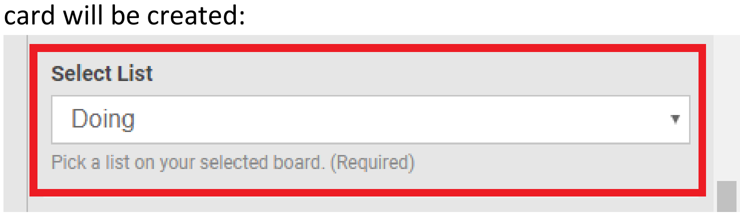
7.1. When Action Type is "Create Card"

When selecting "Create Card" action, each time your form receives a new result, a card is posted on your Trello list in a board you specify.

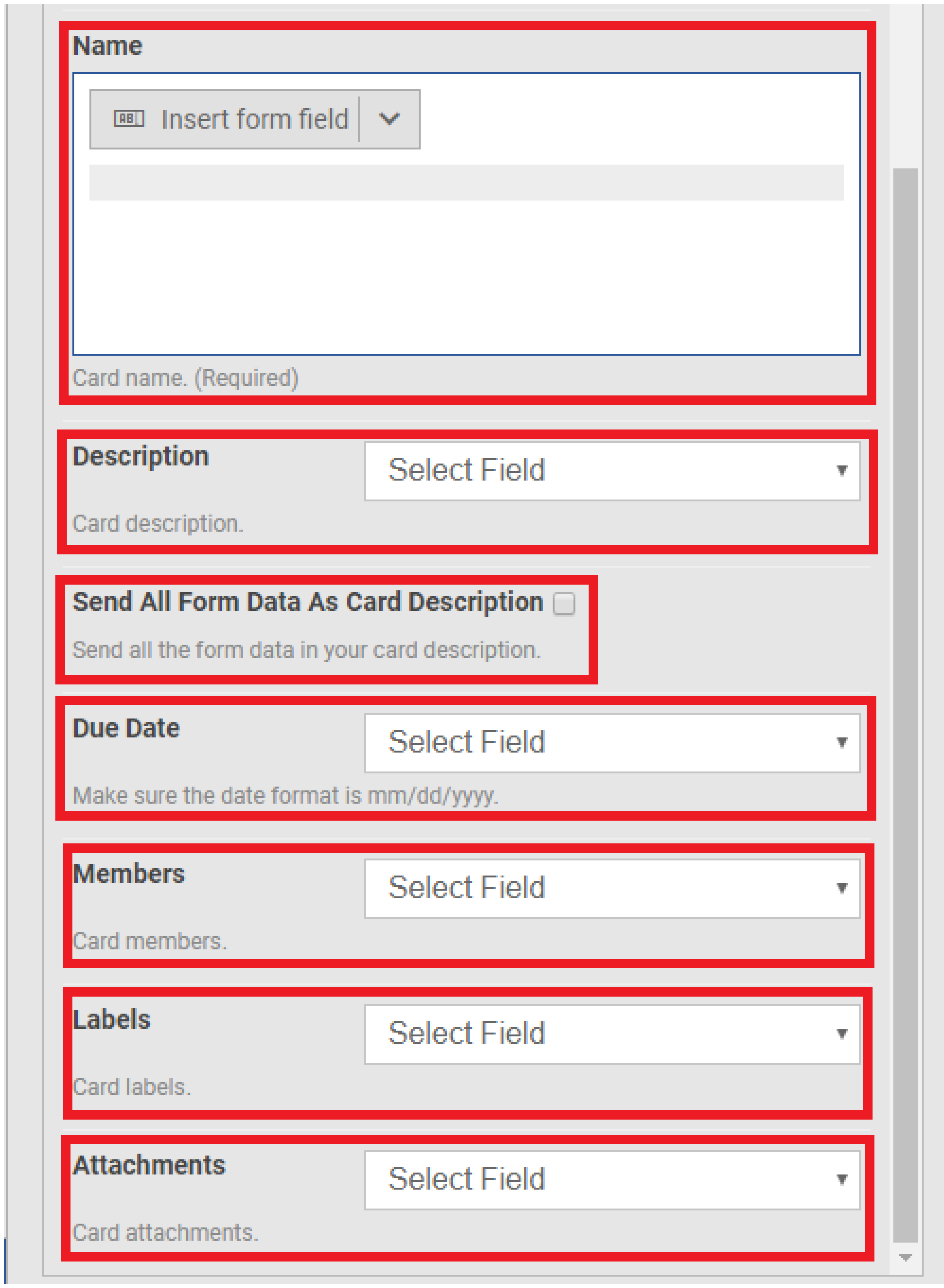
7.1.1. From "Select Board" option that appears, select the board from Trello where your card will be created:



7.1.2. From "Select List" option that appears, select the list of your Trello board where your card will be created:



7.1.3. **Additional settings will appear** in your Trello integration configuration window:



7.1.4. **Provide the name of your card**, by filling the "**Name**" setting of your configuration (you have the opportunity to compose the name of the card by inserting values from your form fields).

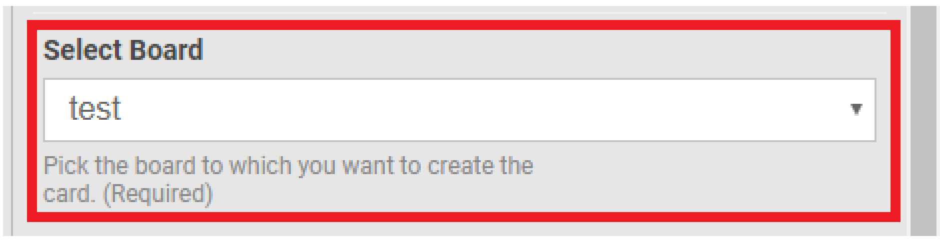
7.1.5. **Optional step**: Configure the rest of your Trello integration by providing values for the rest of optional fields ("Description", "Send All Form Data As Card Description", "Due Date", "Members", "Labels", "Attachments").

Note: If you want to save all your form data in the description of the card which is created, check "Send All Form Data As Card Description".

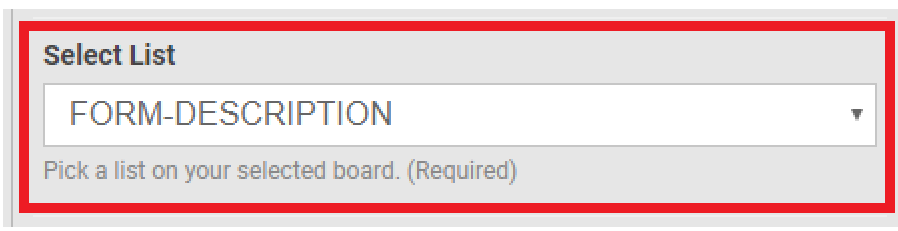
7.2. When Action Type is "Update Card"

When selecting this type of action, each time you receive a new form result, a card you select will be updated in your Trello board

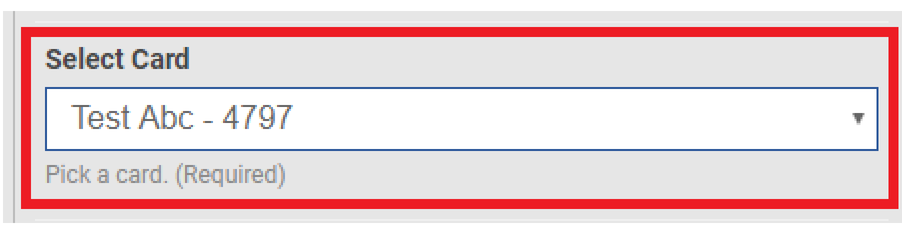
7.2.1. **Select the board in which your card is located** on Trello:



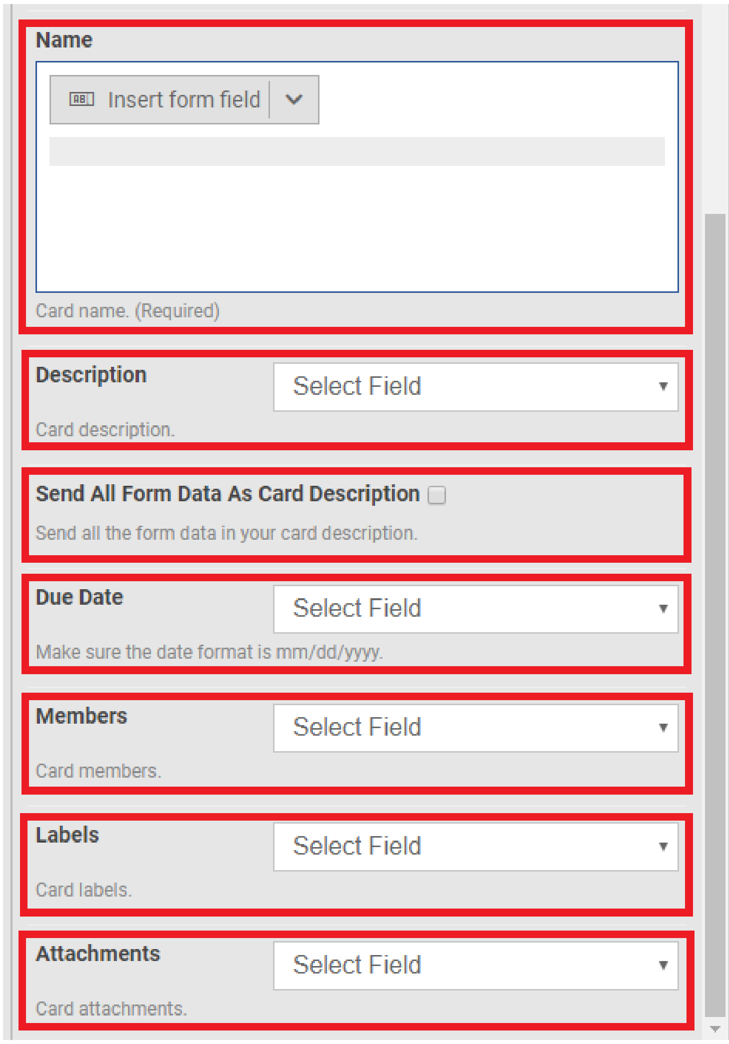
7.2.2. **Select the list from your board where your card is located** on Trello:



7.2.3. **Select the card you want to update**:



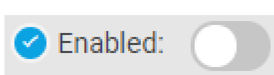
7.2.4. **Additional settings will appear** in your Trello configuration window:



7.2.5. **Write the new name of the card** in **Name** setting (write existing card name if you don't want to change the name of the card)

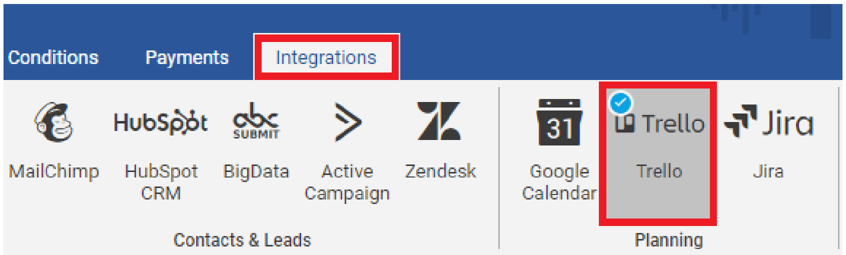
7.2.6. **Optional step**: provide values for the rest of the properties of the card you want to be updated ("Description", "Send All Form Data As Card Description", "Due Date", "Members", "Labels" and "Attachments")

Note: If you want to update the card description to contain all your form data, please check "Send All Form Data As Card Description"

8. **Click** on 

button in order **to save and activate** your Trello integration.

After all configuration steps are completed**, your Trello integration will appear as configured and activated**:


Conditions
Payments
Integrations
MailChimp
HubSpot CRM
BigData
Active Campaign
Zendesk
Google Calendar
Trello
Jira
Contacts & Leads
Planning

4.1.12. Jira (form integration)

[Note]: In order to **configure** your AbcSubmit **Jira integration**, you will need an Atlassian Jira account.

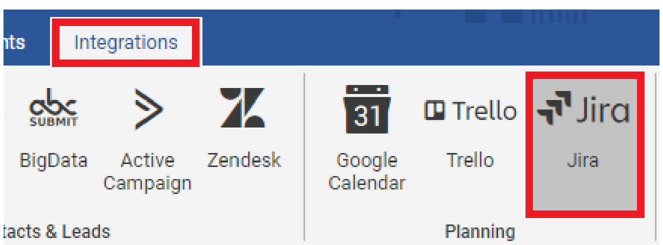
Jira is the #1 software development tool used by agile teams. It helps you to create user stories and issues, plan sprints, and distribute tasks across your software team, and much more.

With the help of **AbcSubmit Jira integration** you can:

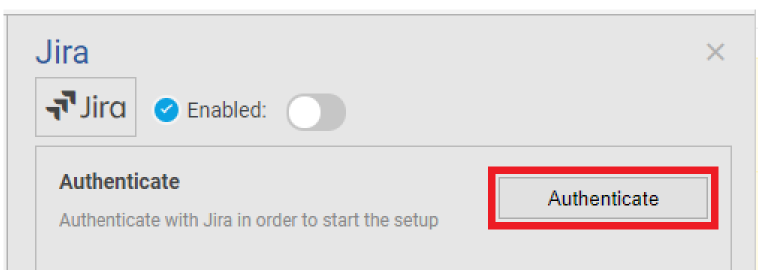
- **Create a new story / bug in** your **Jira** account based on the data you receive from your form
- **Update an existing story / bug in Jira** each time you receive a form result
- **Add comments to an existing Jira story / bug** when your form receives a new result.

In order to configure and enable your Jira integration, please follow these steps:

1. **Click** on **Integrations** tab
2. **Click** on **Jira** button:



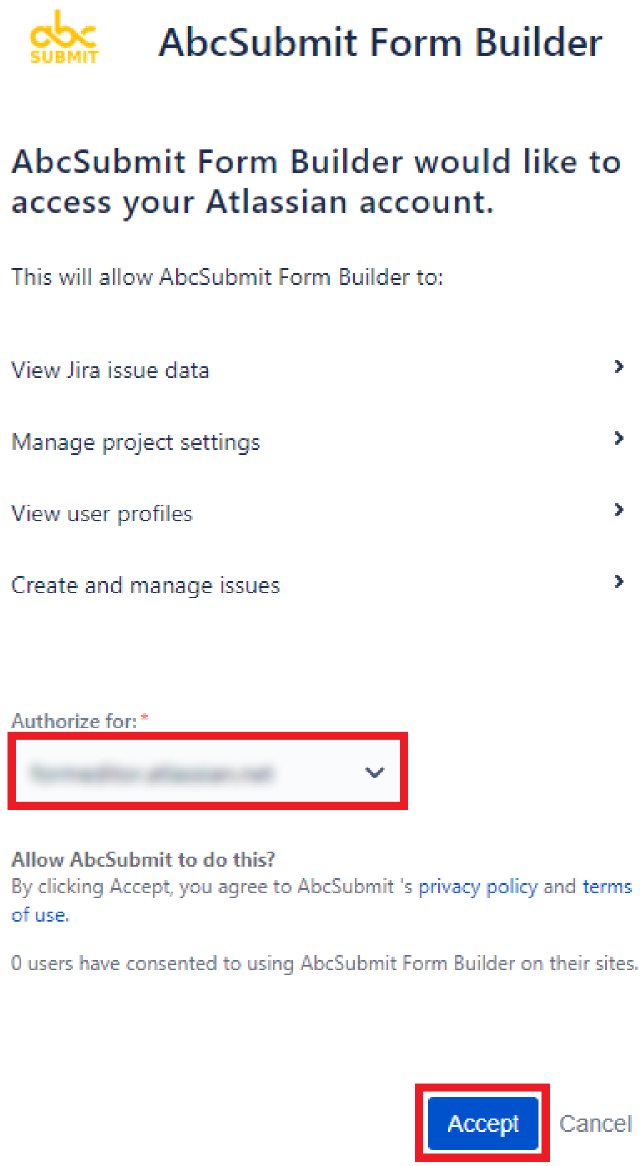
3. **Jira** integration **configuration window will appear in the right side of your form**:



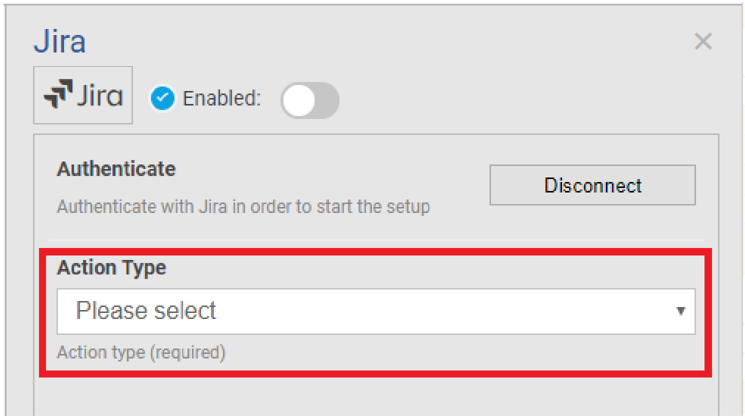
4. **Click** on "**Authenticate**" button

5. **A popup will appear** from Atlassian, asking you to authorize AbcSubmit to **connect to your Jira account**.

   After you **select the project of your Jira account** where you want to give access to AbcSubmit (from **Authorize for** dropdown), **click Accept**:



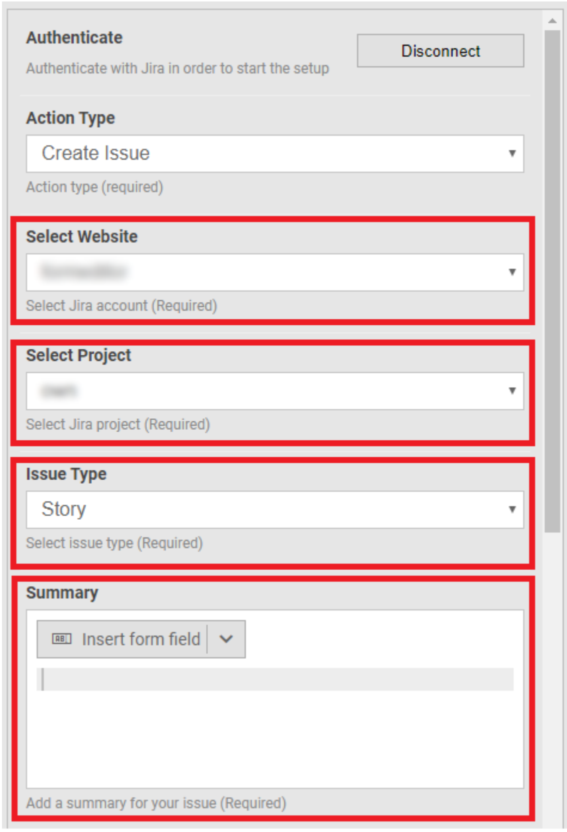
6. **Jira** integration **configuration window is updated**, **containing** an additional field called **Action Type**:

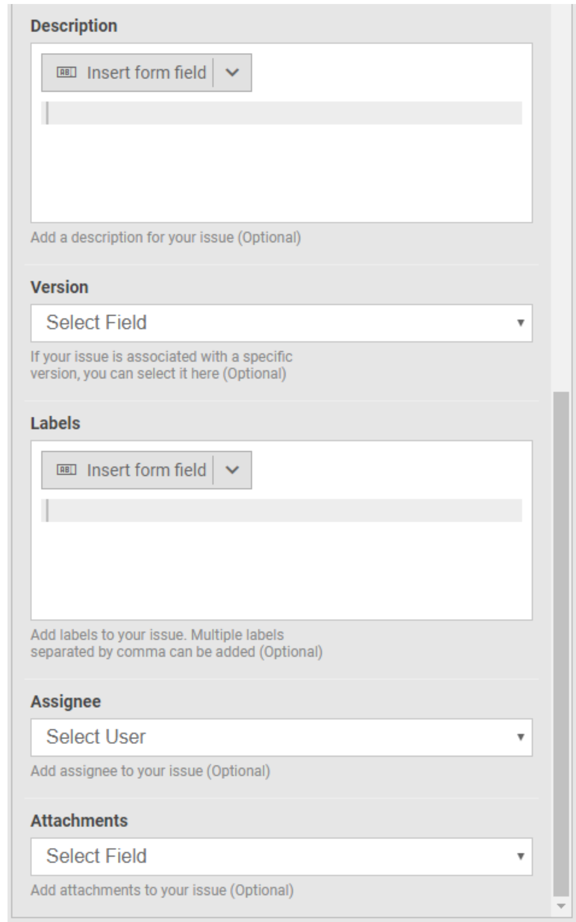


7. **Select the action you want to be performed by your Jira integration**. Depending on the action you select, **please follow appropriate sub-step of this tutorial** (7.1, 7.2 or 7.3).

7.1. When **Action Type** is “**Create Issue**”

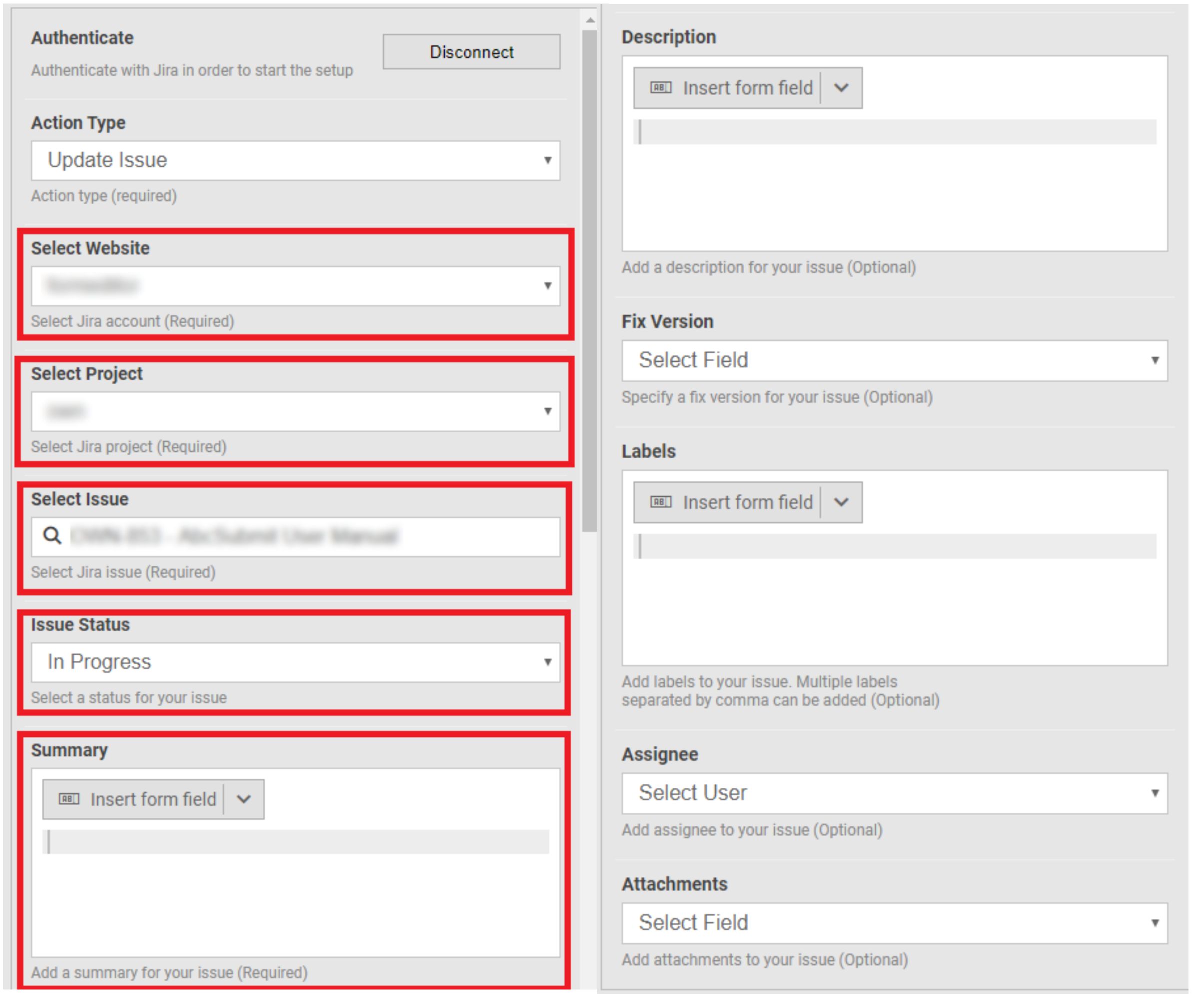
Use “Create Issue” action in order to create a new story / bug to a project from your Jira account:





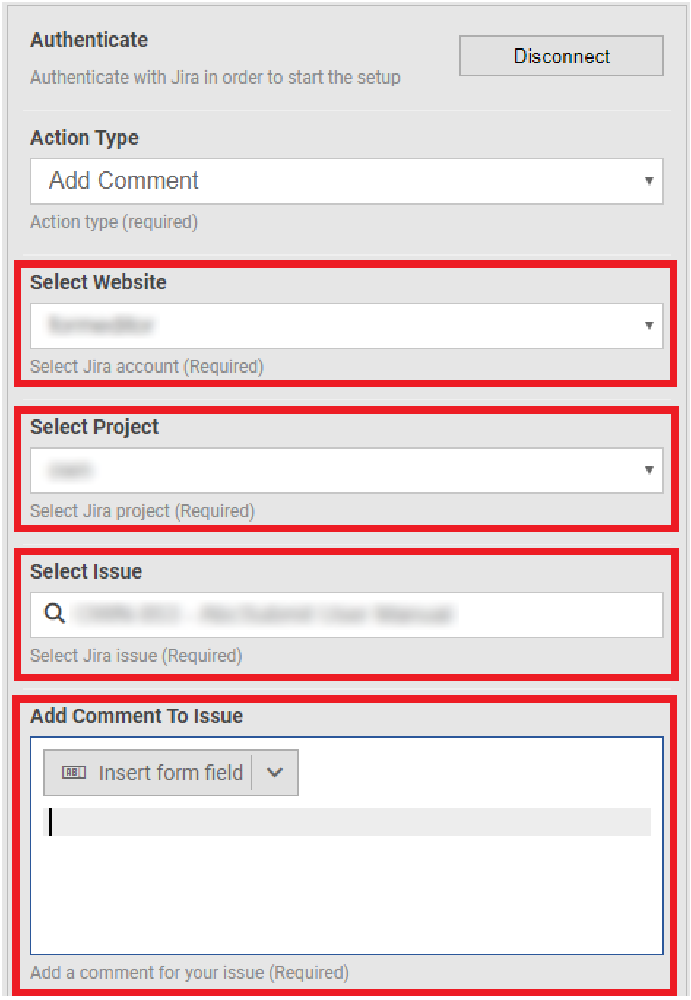
7.2. When **Action Type** is “**Update Issue**”

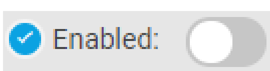
Use “Update Issue” action in order to modify the fields of an existing story / bug of a project from your Jira account:



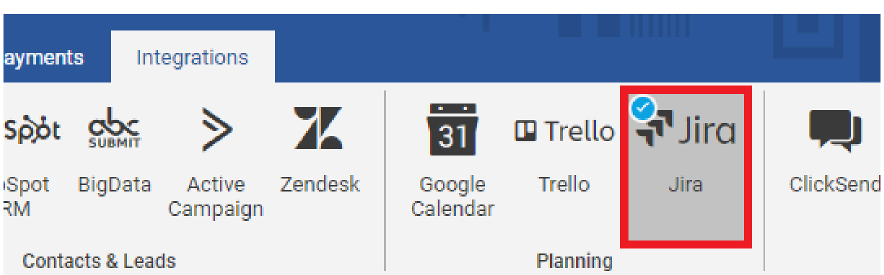
7.3. When **Action Type** is "**Add Comment**"

Use "Add Comment" action in order to post a new comment to an already existing story or bug located inside a project of your Jira account:



8. Click on  in order to save and activate your Jira integration.

After all configuration steps are completed, your AbcSubmit **Jira integration will appear as configured and activated** inside your Integrations tab:



4.1.13. ClickSend (form integration)

Note: In order to configure this integration, you will need a ClickSend account first.

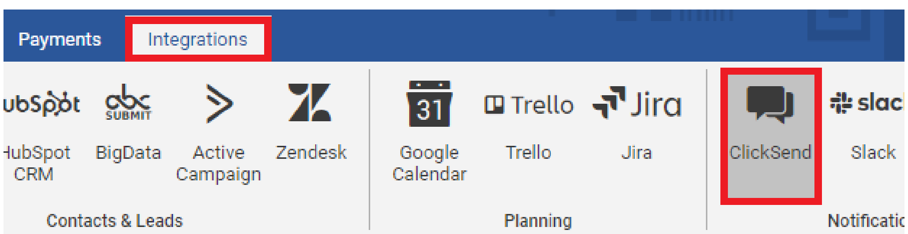
ClickSend is a cloud-based gateway service for your business that lets you send bulk SMS, email, fax & letters worldwide!

With the help of AbcSubmit ClickSend integration you can **send an SMS message to predefined phone number** recipient **or** a **phone number submitted by your form** (number collected via a phone number field).

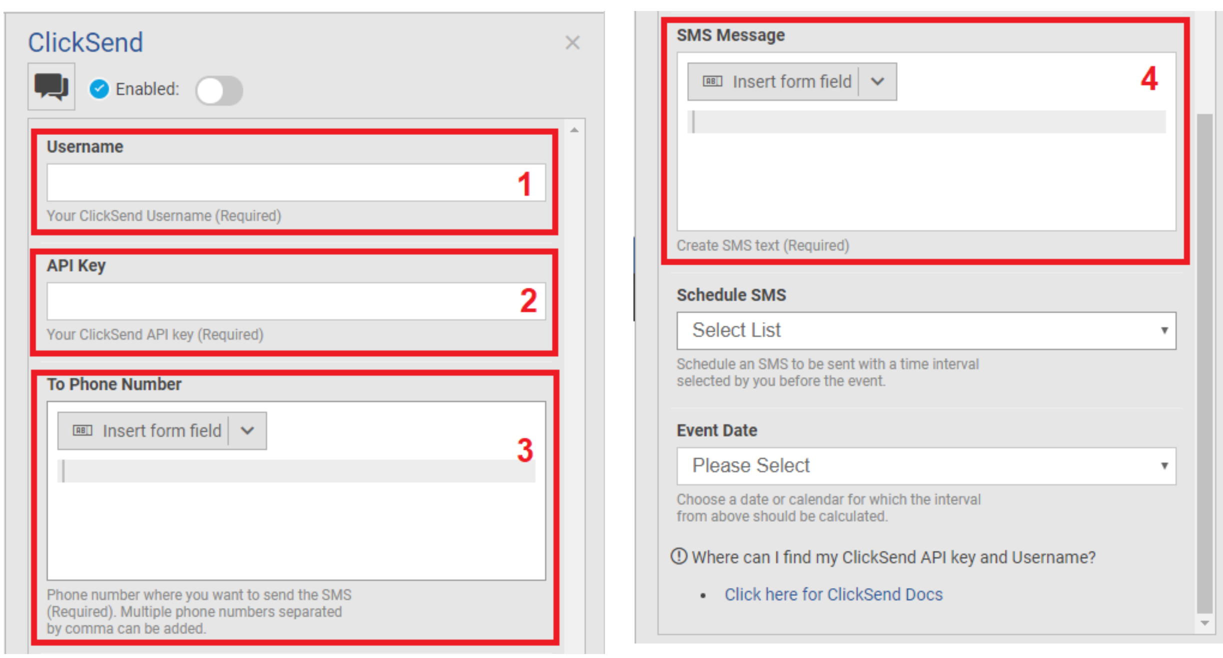
Optionally, you can **delay the SMS message delivery** to a configurable amount of time, or to a specific date.

In order to **configure** AbcSubmit **ClickSend integration**, please follow these **steps**:

1. Click on **Integrations** tab
2. Click on **ClickSend** button:



3. **ClickSend integration** configuration **window** will appear in the right side of your form:



4. Fill in your **Username** and **API Key** in your configuration settings. You can find instructions related on how to find your API key by reading **ClickSend getting started documentation**.

5. **Write the phone number(s)** which will receive your SMS **in field "To Phone Number"**. If you want to send a SMS to multiple recipients, **separate the phone numbers with a coma** (,).

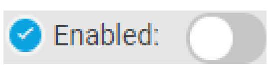
   [TIP]: Click on "Insert form field" button in order to inject in your list a form field which collects the phone number

6. **Write the SMS message** which will be delivered to your recipient(s) **in field** "**SMS Message**".

   [TIP]: Click on "**Insert form field**" button in order to **inject** in the message **a value collected by one of your form fields**.

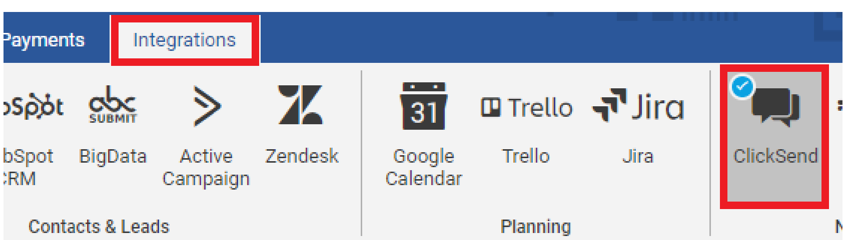
7. **Optional step**: From dropdown "**Schedule SMS**", you can **choose a delay** after which your SMS will be sent.

8. **Optional step**: From dropdown "**Event Date**" you can **choose a date** when the SMS message will be delivered to your recipient(s). **Select a field of your form which represents the date when the SMS will be sent**.

9. **Click** on 

button in order **to save and activate your ClickSend configuration**

After all configuration steps are performed, your **ClickSend integration will appear as enabled and configured**:



4.1.14. Slack (form integration)

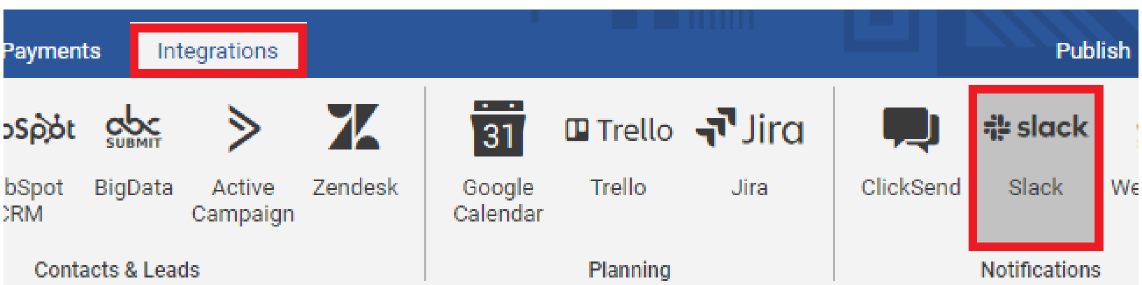
[Note]: In order to configure this integration, a Slack account is required.

With all of your communication and tools in one place, Slack helps your teams to stay productive no matter where they're working from.

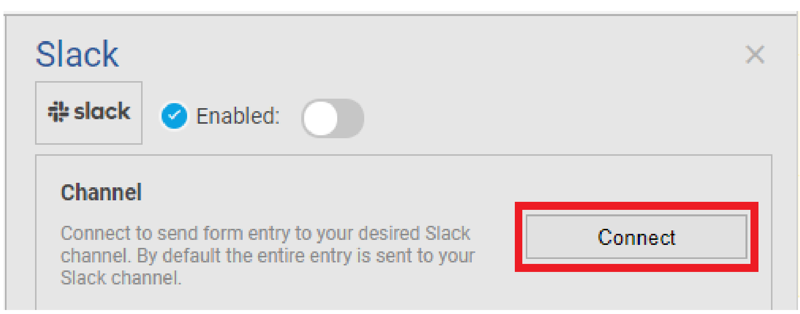
With the help of AbcSubmit **Slack** integration, you can **send a message** (either all submitted form data, either a customized text message containing a subset of data from your form result) **to a channel or contact from your Slack account**.

In order to **configure and enable** your **Slack** integration, please **follow these steps**:

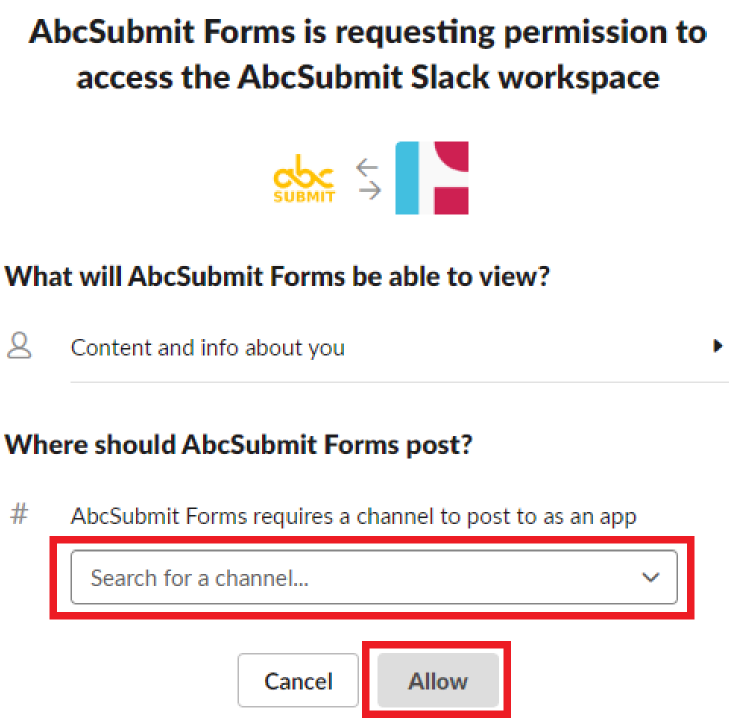
1. **Click** on **Integrations** tab
2. **Click** on **Slack** button:



3. Slack configuration window will appear on the right side of your form:



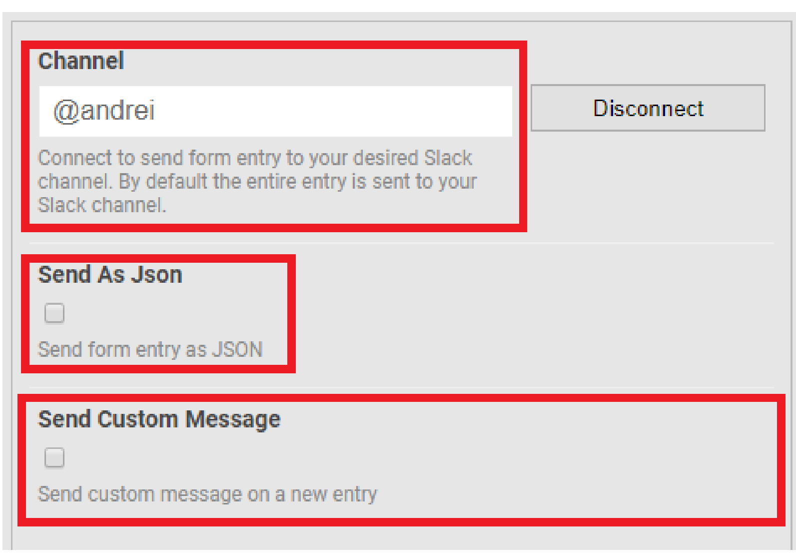
4. **Click** on **Connect** button, in order **to authorize AbcSubmit to post to your Slack account**. A popup window from Slack will be opened:



5. **Select** the **group or person** from your company **which will receive the message send via** your **Slack** integration (from "**# AbcSubmit Form requires a channel to post as an app**" dropdown)

6. **Click** button "**Allow**"

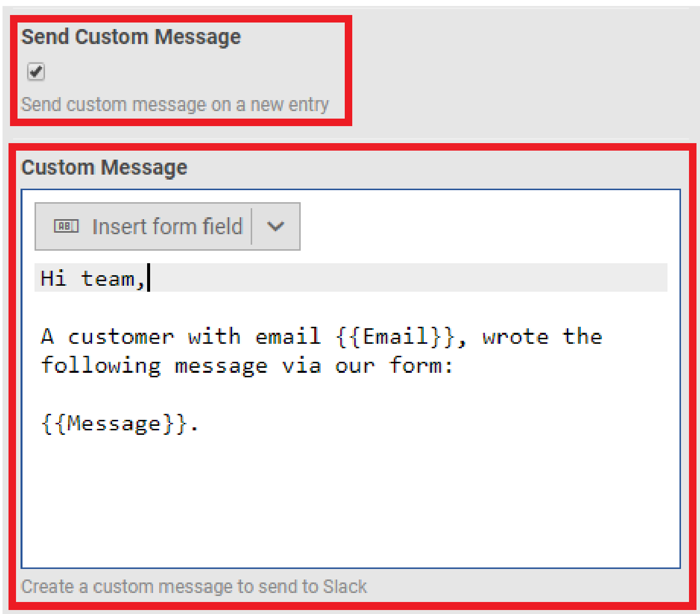
7. Your Slack **integration configuration window is updated**, containing the following options:



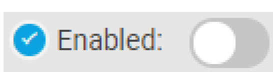
In the "**Channel**" **setting** of your integration, **the name of the user or group** you selected at step 5 **will appear**

8. **Optional step**: In case you want to send in JSON format all your form data to the selected recipient, check “Send As JSON” setting

9. **Optional step**: In case you want to send a custom text message to your recipient (Channel) containing only a subset of values from your submitted form data, check “Send Custom Message”:

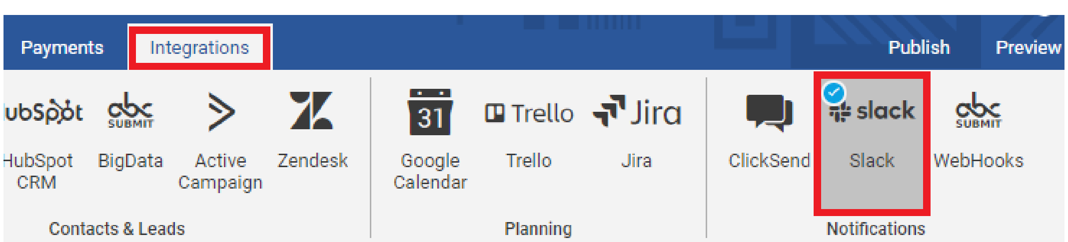


9.1. **Edit** the **custom message**, by writing text in the setting. **Click** on “**Insert form field**” in order **to inject the value of a field from your form into the message you’re writing**.

10. **Click** on 

, in order **to save and enable your Slack integration**.

After all configuration steps are completed, your **Slack integration** is ready to be used, and **appears as configured and activated** in your Integrations tab:



4.1.15. WebHooks (form integration)

Author of WebHooks integration: AbcSubmit.

With the help of AbcSubmit **WebHooks integration**, you can **configure** your **form to perform a new web request** (of type **POST, GET or PUT**) **to an arbitrary URL** (a **rest API** for example) you specify, **each time you receive a new form result**. The request can contain **data from your submitted form result**, allowing you to **automate** your form with **any software service** provided by your company **which supports HTTP communication**. As a security measure, **basic HTTP** (server to server) **authentication** is **supported**.

In order to **configure** your **WebHooks** integration, please **follow these steps**:

1. **Click** on "**Integrations**" tab

2. **Click** on "**Webhooks**" button

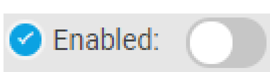
3. **Specify the URL** (in field **WebHook URL**) which will be called by the web request after your form receives a new result

4. **Optional step**: **Provide a user and a password** which will be sent to your WebHook URL (by **select**ing "**Basic Authentication**" **in** dropdown "**Authentication Type**"):

   4.1. **Specify** a **user** (in field "**Authentication User**") used when performing authentication on your WebHook URL
   4.2. **Specify** a **password** (in field "**Authentication Password**") used when performing authentication on your WebHook URL

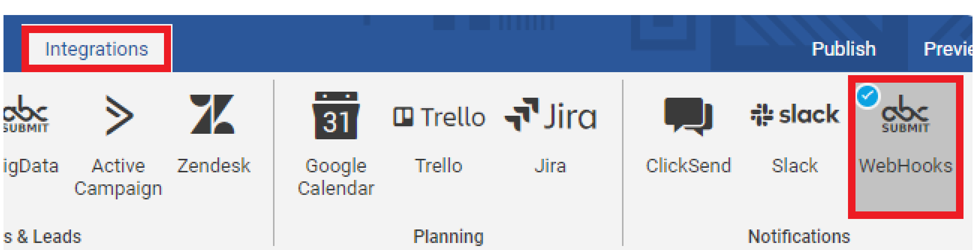
5. **Select** the **http method** (from "**Method**" dropdown) which will be used when accessing your webhook URL (**GET**, **POST** or **PUT**)

6. **Attach data from your form result to request** made to your WebHook URL (by mapping request parameters containing data from your form fields).

7. **Click** 

in order **to save and activate** your **WebHooks** integration **configuration.**

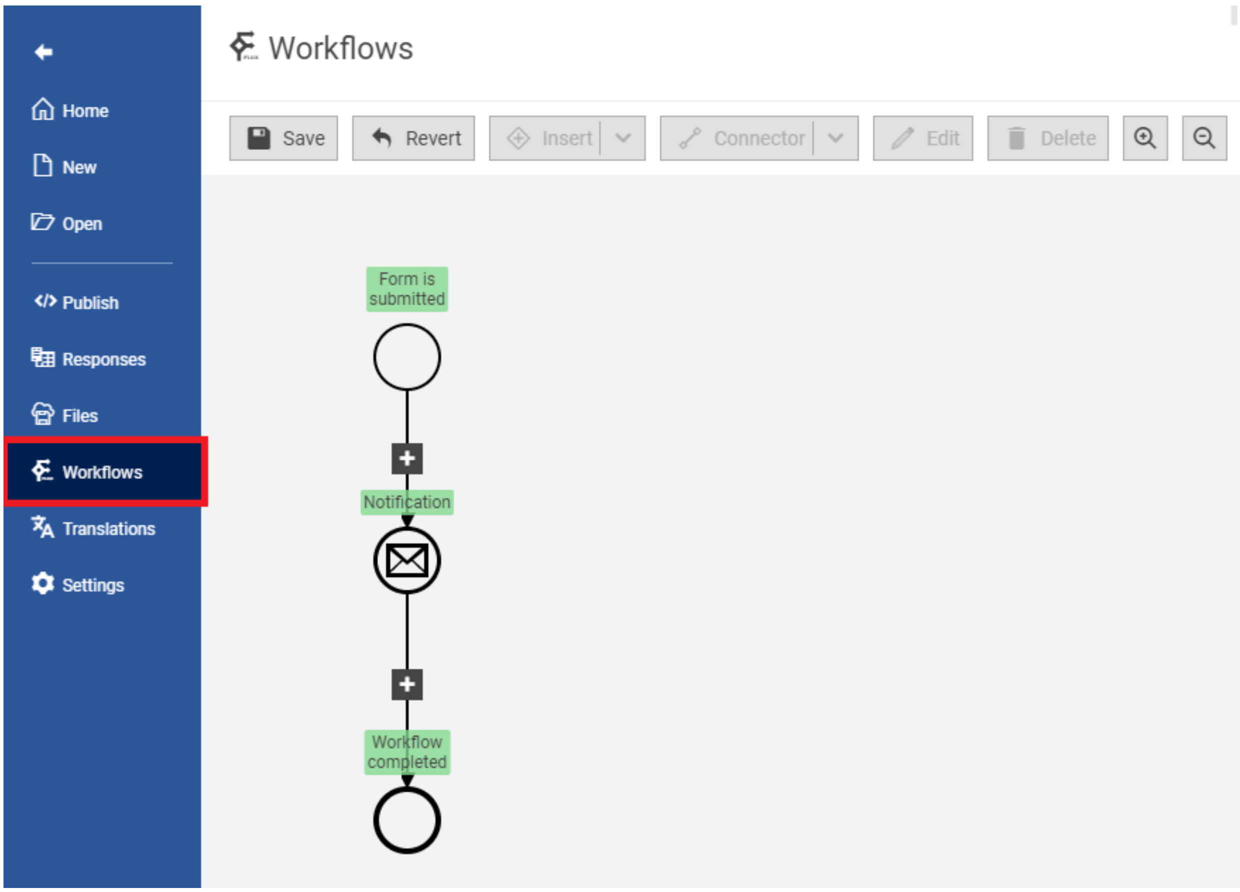
After all steps are performed, your **WebHooks** integration **will be displayed** as **configured and active**:



5. Workflows automation

A **workflow is a set of business logic** (a logic scheme or diagram) that is "**executed**" on the server **each time your form is submitted**.

Each time a form is created, a default Workflow is also created for that form.



Default workflow of a form

Form workflows are versioned. Version starts with "1", and is incremented each time a workflow is saved (after you make modifications in the workflow diagram). Each time a form is submitted, only the latest version of the workflow is executed.

A form workflow can be a time-consuming operation. Old workflows that are still running after a workflow is modified will continue to run using their initial version (format) used when they were started.

5.1. Configure your form workflow

1. Open a form
2. Click on 

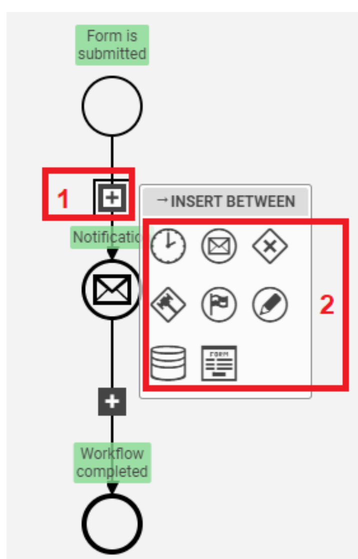
 in the builder main menu
3. Edit / insert workflow nodes in the diagram
4. Save changes.

Depending on the subscription type you have on AbcSubmit, some limitations are applied when saving the workflow:

Plan	Limitations
Free	- Can add only max two Notifications and a single Condition - Cannot remove branding from notifications (header and footer of email notifications) - Cannot add email attachments on notifications
Core	- Can add only max two Notifications and a single Condition - Cannot add email attachments on notifications
Professional	No limitations
Ultimate	No limitations
Enterprise	No limitations

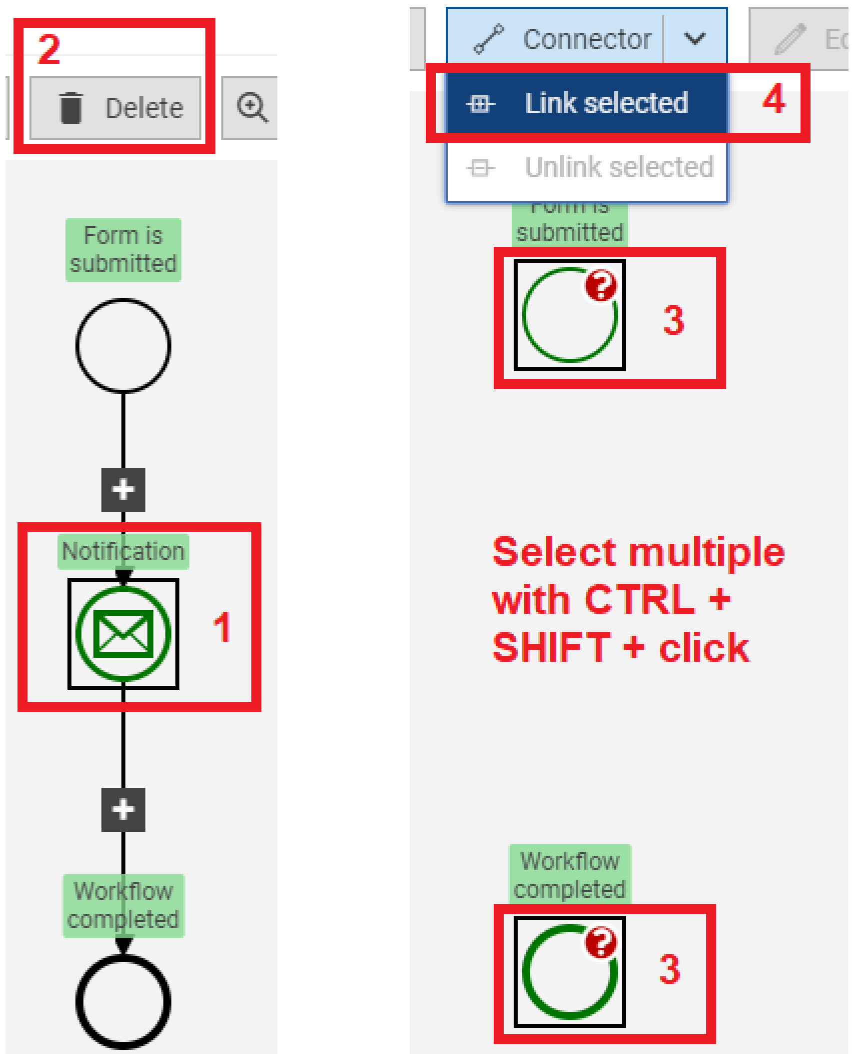
[FAQ] How to insert a new workflow node between two existing nodes

1. Click on the + sign between the nodes you wish to insert a new node
2. Click on the node type you wish to insert



[FAQ] How to *remove a workflow node*

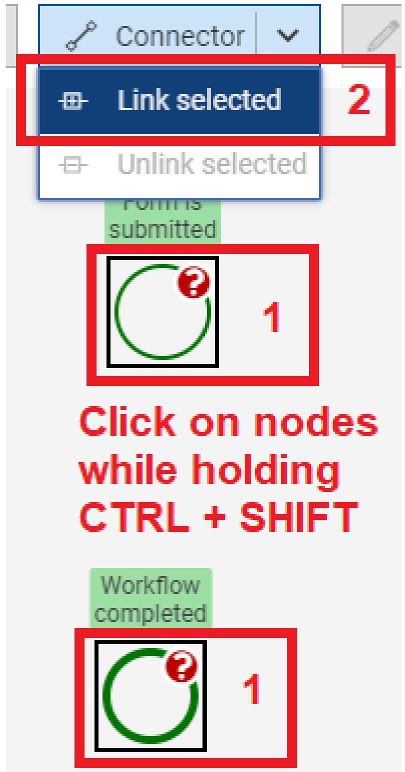
1. Click on the node you wish to delete
2. Click on “Delete” button
3. Link the extremity nodes back



[FAQ] How to *link (connect) two workflow nodes*

1. Click on the nodes you wish to connect while using Ctrl + Shift

2. Click on Connector -> Link selected



*[FAQ] **Save button don't work (is disabled). What can I do**?*

Workflows which are in an invalid state cannot be saved. Try fixing errors of your workflow first. Check the following:

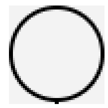
- All flows are ending with a STOP node
- There are no nodes in error state (a node in error state contains a red indicator with a question mark): 
- If above steps don't work, try reverting the workflow to it's last saved state, and start doing from beginning the modification you intended.

*[FAQ] What does **"Revert" button** do?*

When you click on 

button, all modifications are discarded, and last version of workflow saved on server is restored.

5.1.1. Start (workflow node)

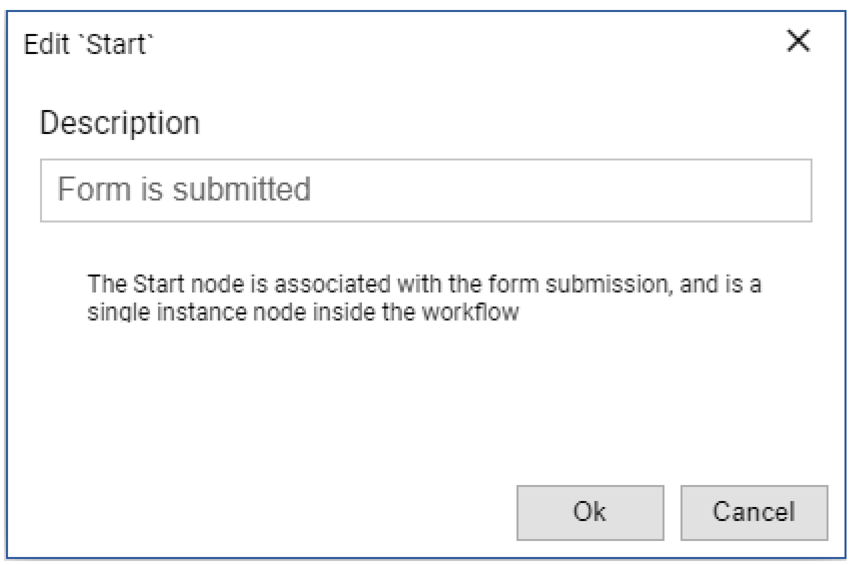


The “**Start**” workflow node is the main entry point of a workflow.

It performs no other function other than to highlight the start of a workflow process.

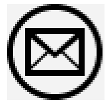
There can be only a single Start node inside a workflow (as opposed to the Stop nodes, which can be added multiple times).

Start workflow node cannot be deleted.

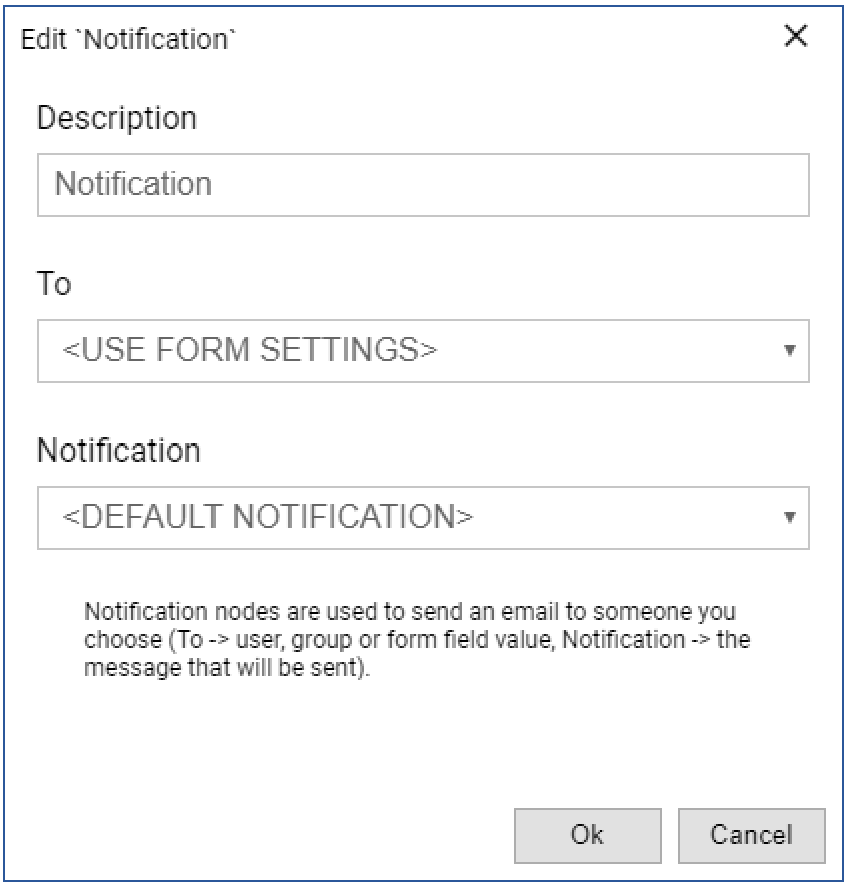


Double click the start workflow node, in order to edit its description

5.1.2. **Notification** (workflow node)



The Notification workflow node is used to send a message to an email address (default form email address, a user or group of users from your company, or an email address collected by a form field).

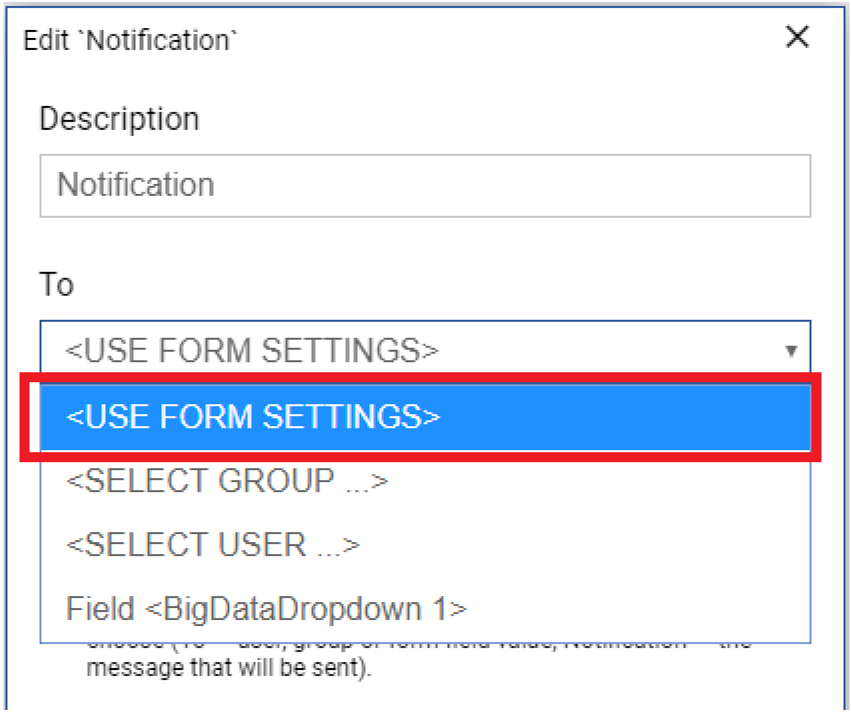


Double click the notification node in order to edit its settings

[FAQ] How to **send notification email to default** form **email address**

See also: configure default form email address

1. Double click the Notification node in order to edit its properties
2. Select <**USE FORM SETTINGS**> in the "**To"** setting:

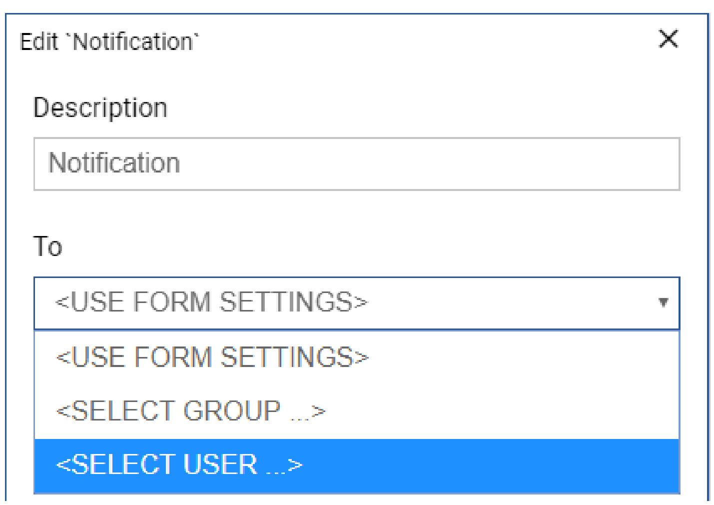


3. **Click Ok** to apply changes

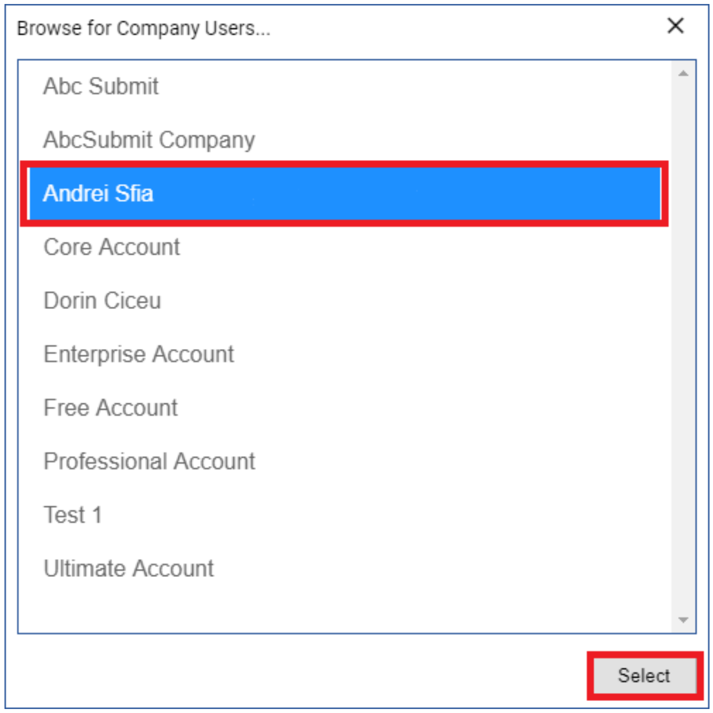
[FAQ] How to send notification email to a user of my company?

[IMPORTANT]: You must have the right to manage company (be the company owner or company admin) in order to enumerate the list of users of a company.

1. Double click the Notification node in order to edit its properties
2. Select **<SELECT USER>** in the **"To"** setting:



3. In the window that appears, **click on the desired user**, then **press Select**:

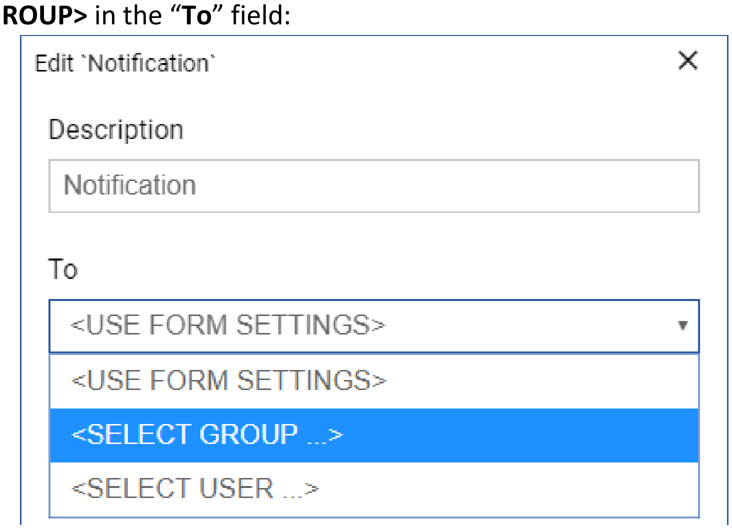


4. **Click Ok** to apply changes

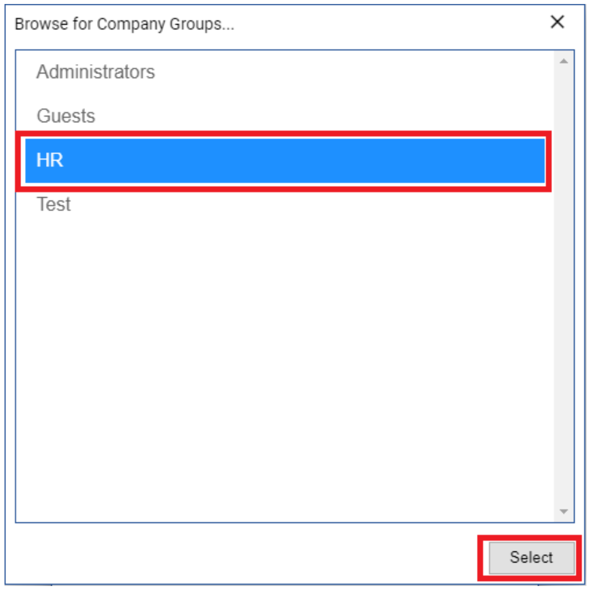
[FAQ] How to send notification email to a group of users of my company?

[IMPORTANT]: You must have the right to manage company (be the company owner or company admin) in order to enumerate the list of groups of a company.

1. Double click the notification node in order to edit its properties
2. Select **<SELECT GROUP>** in the "**To**" field:



3. In the window that appears, click on desired group of users, then click on "Select" button



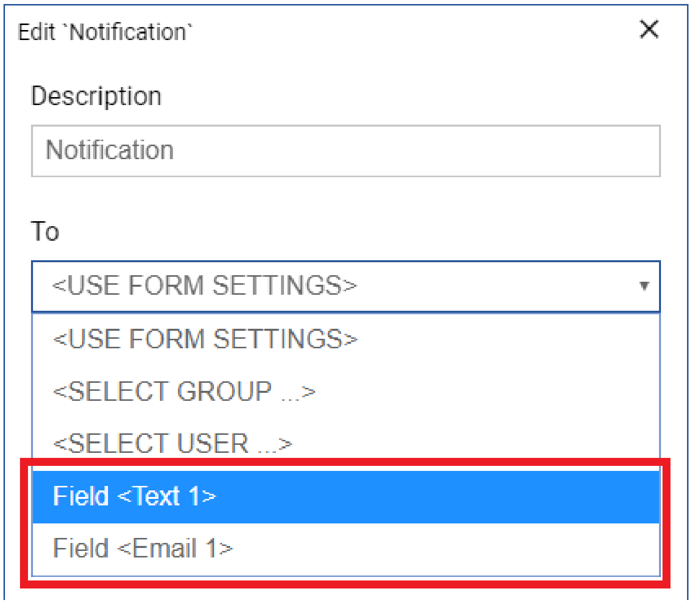
4. **Click Ok** to apply changes

[FAQ] How to send notification email back to the user which filled the form or a form field?

Note: Only fields of type Short Text, Email, Single choice or Hidden Short text can be selected.
If at submission time the field is not filled or contains invalid email address, the notification will not be sent at all, and workflow will continue execution to its next step.

1. Double click the Notification node in order to edit it's setting

2. In field “To”, select the form field which will contain the email address where the notification will be sent:



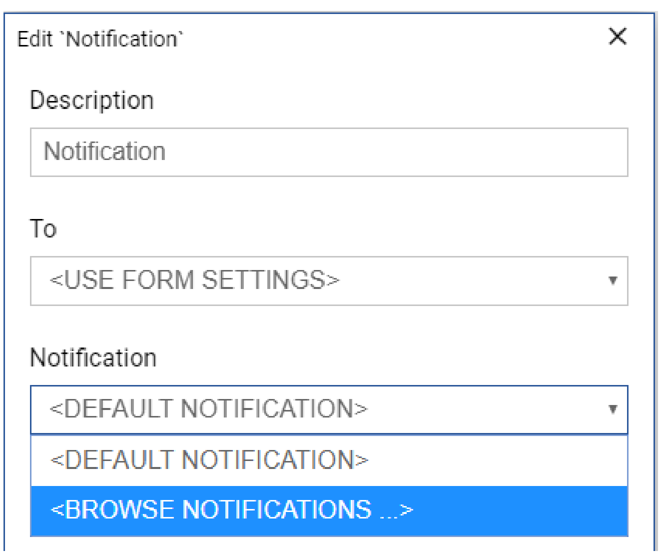
3. **Click Ok** to apply changes

*[FAQ] How to **edit or select** a **notification email message**?*

By default, the Notification block of the workflow, sends the default form Notification message.

In order to customize the Notification message, follow these steps:

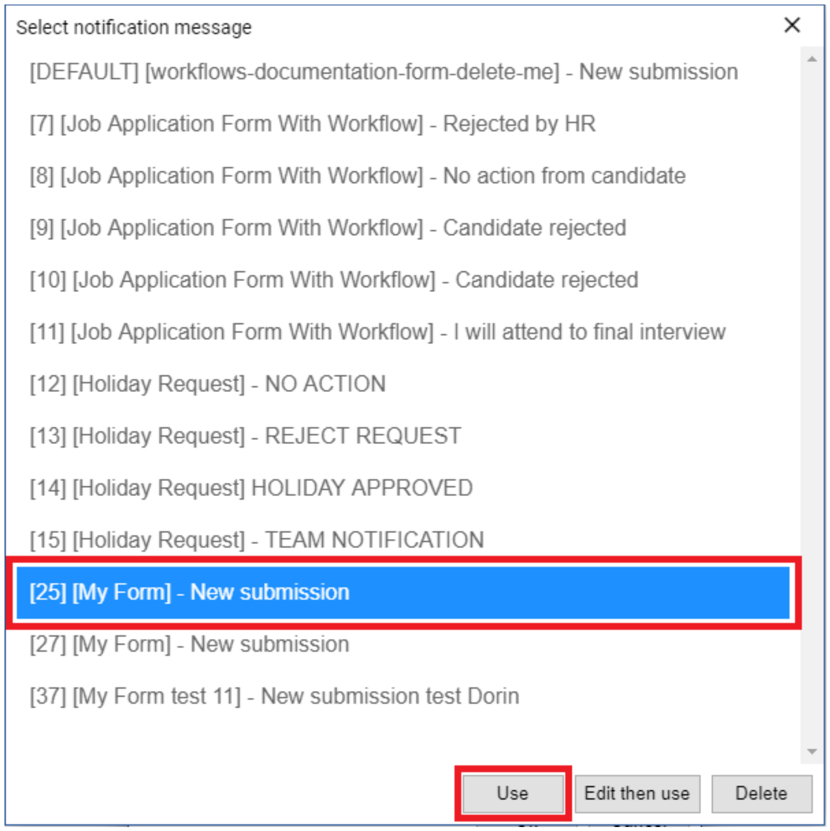
1. Double click the Notification block in order to edit its settings
2. Select <BROWSE NOTIFICATIONS> from the field “Notification”:



3. A window will appear. Here you have two choices (either 3.1, either 3.2):

3.1. Use a previously created notification (**if there are no previously created notifications**, the list will contain only the [DEFAULT] form notification – **proceed to step 3.2. instead**)

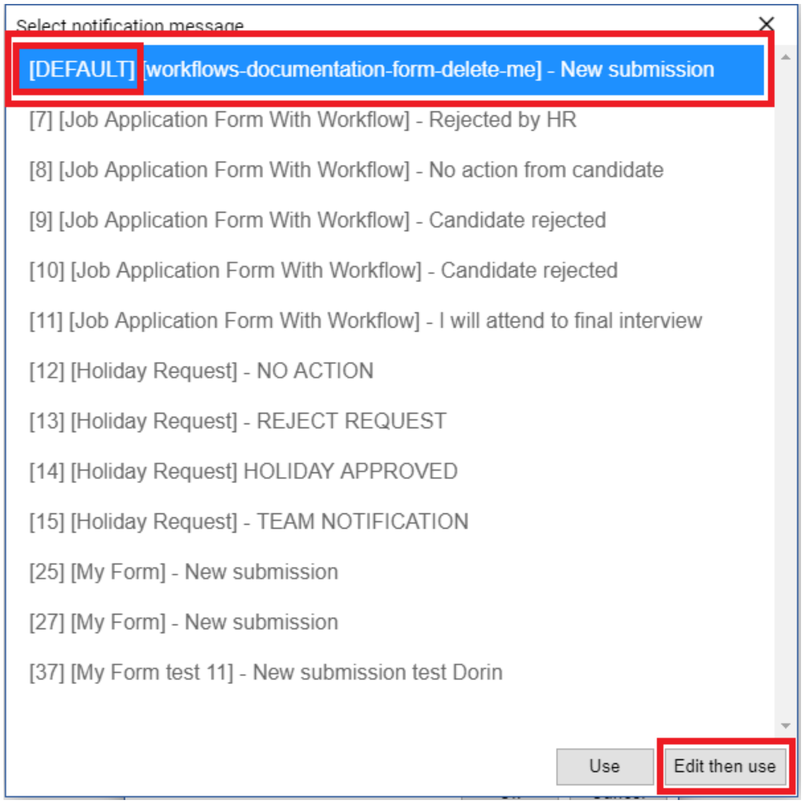
3.1.1. **Select** the **desired notification**, **then click "Use"**



3.2. Duplicate default form notification message, edit it, then use edited notification message

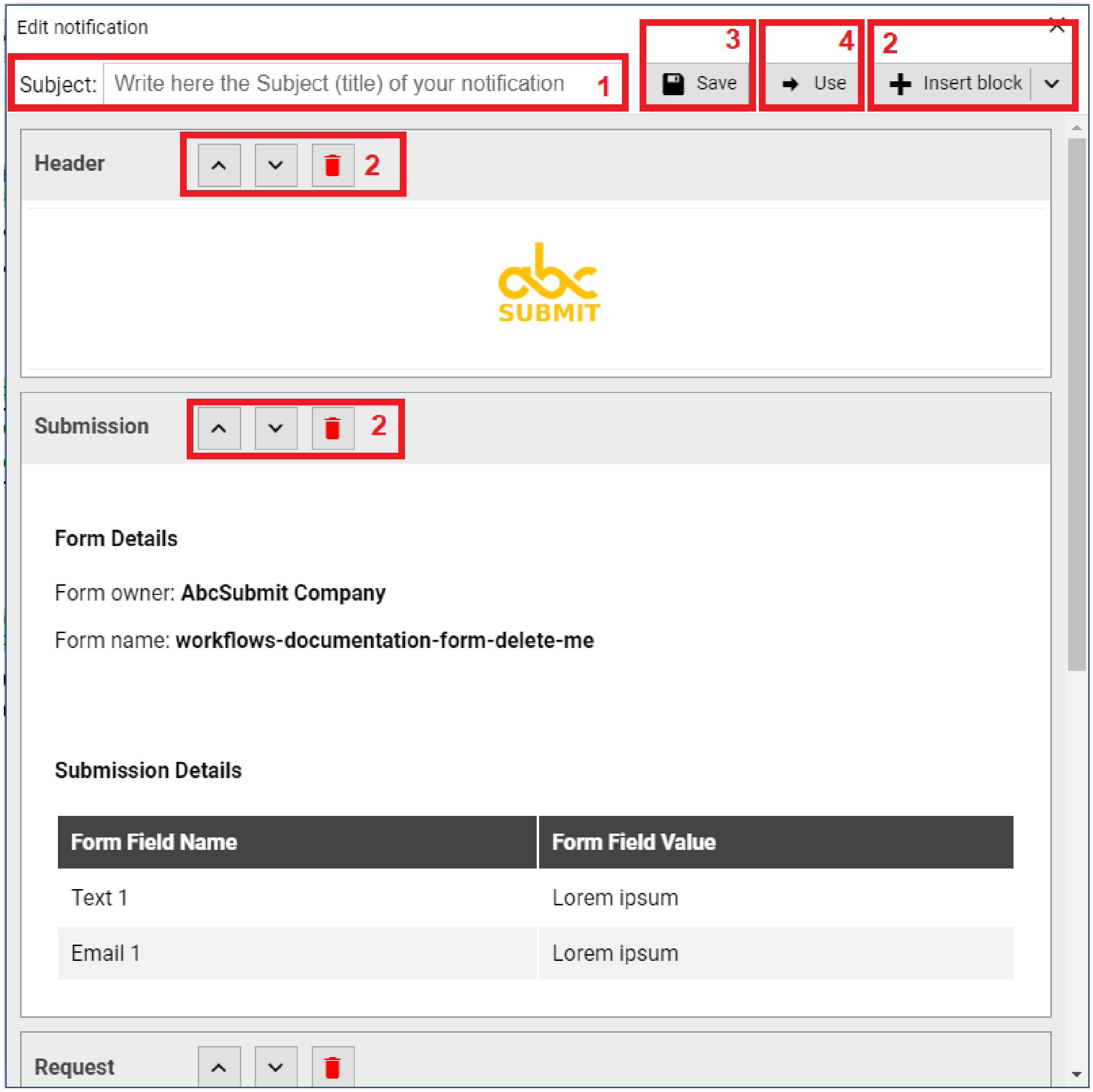
The first item in the list (which starts with text "[DEFAULT] …") is the default form notification message.

3.2.1. Select first item in the list (that one **which starts with "[DEFAULT] …"** text), **then click on "Edit then use"** button:



3.2.2. The **Notification editor** window will appear.

Follow sub-steps **(1)**, **(2)**, **(3)** and **(4)**:



Notification editor window

(1) Type the Subject of notification

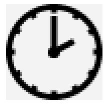
(2) Insert / adjust / edit notification blocks

(3) Click on "Save" button

(4) Click on "Use" button

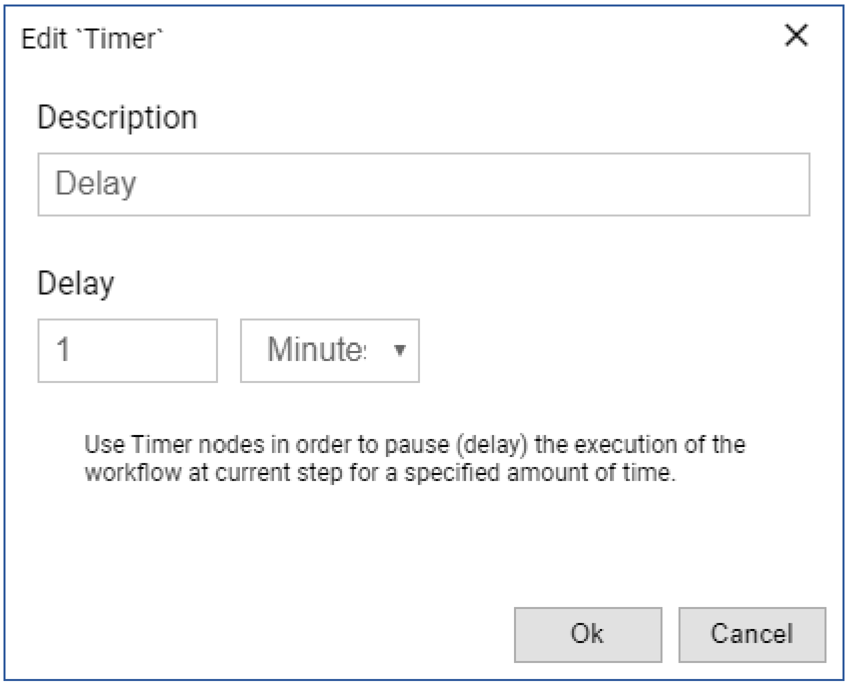
4. In window "Edit Notification, **click "Ok"** to apply changes.

5.1.3. Timer (workflow node)



A Timer node **pauses the workflow for a specified amount of time** (Delay), **then automatically resumes workflow execution**.

Double click the Timer node in order to edit its delay, then click Ok to apply changes:



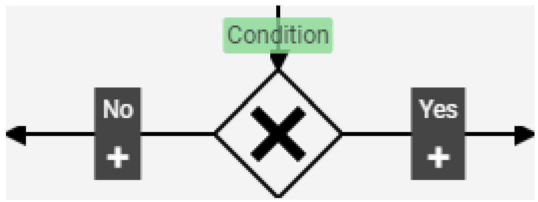
[FAQ] Why do I need to pause the workflow?

Sometimes your will need to pause the workflow execution.

Suppose someone buys an item with your form, and you want to send a Thank you notification to the user after 3 days…

… Or someone fills a support form on your website, and you want to send an invitation to fill a user satisfaction survey (another form), after 8 hours the problem is solved.

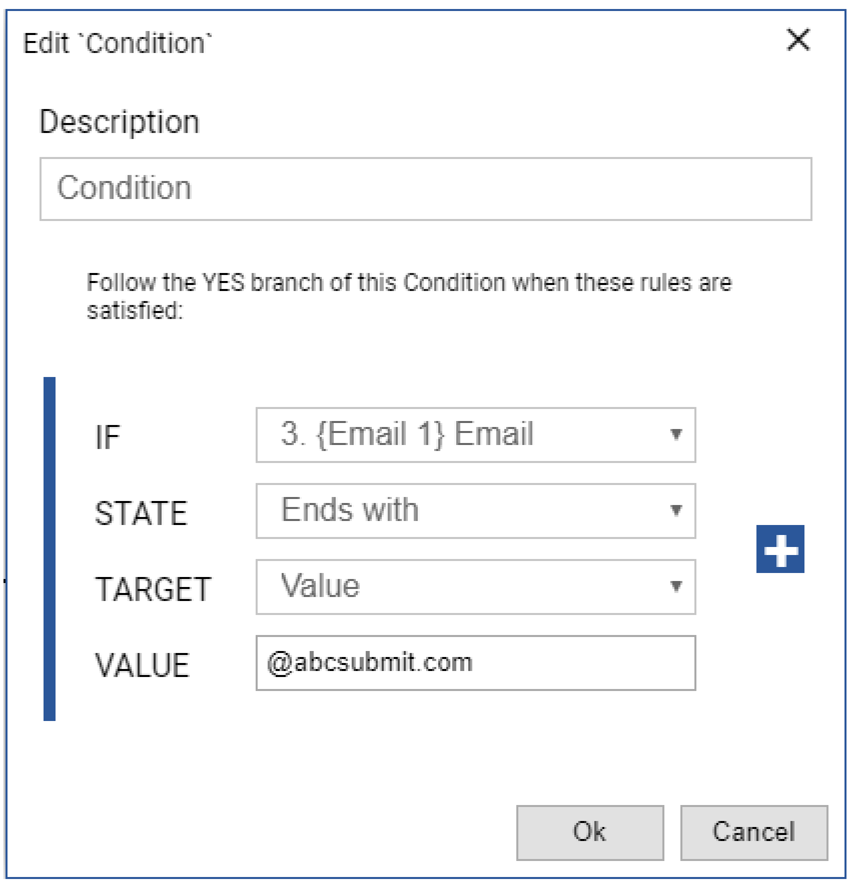
5.1.4. Condition (workflow node)



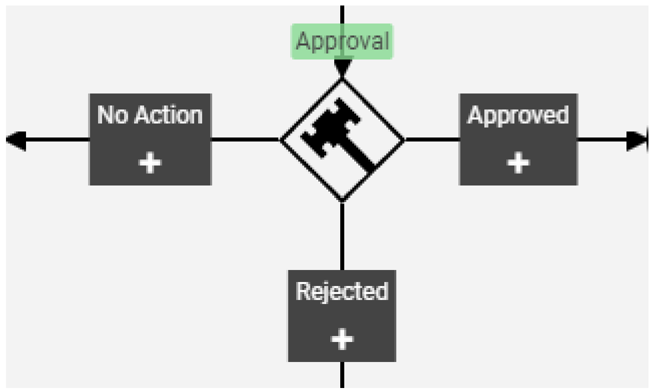
Use a Condition workflow node in order to split workflow execution in two conditional logic cases: YES and NO, based on conditional logic rules you specify.

If the rules of the condition are matched, the workflow execution will continue using **YES branch**. **Otherwise**, execution of the workflow will continue using **NO branch**.

Double click the Condition workflow node in order to edit its settings, then click on “Ok” button in order to apply changes:



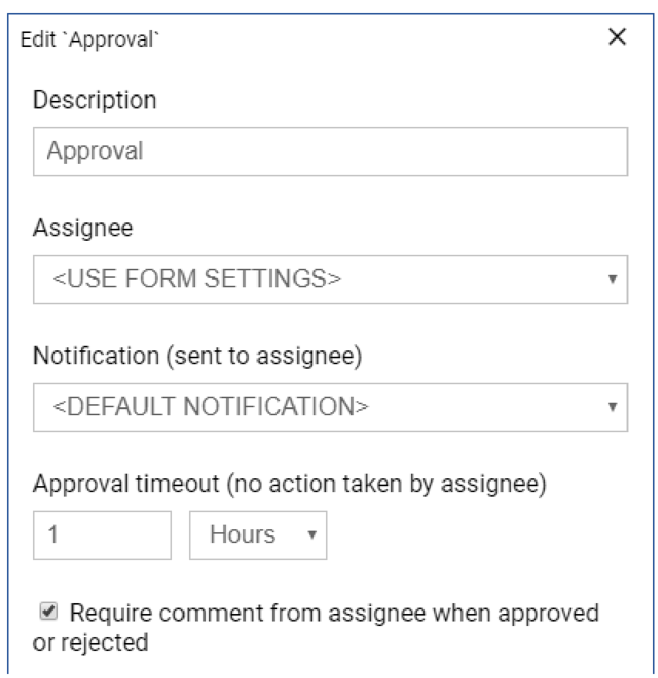
5.1.5. **Approval** (workflow node)



The Approval workflow node **sends an email notification to a recipient** (default form email – you, a user or group of your company, or a form field) containing a link **from where the recipient can** “**Approve**” or “**Reject**” **current workflow step**. **If the recipient does not take any action for a specified amount of time**, the “**No action**” branch **is followed**.

An optional comment can be required for the **Approve or Reject operation**

An approval history is **tracked for each approval step** (which **can be forwarded in next notification emails** sent by the workflow system).

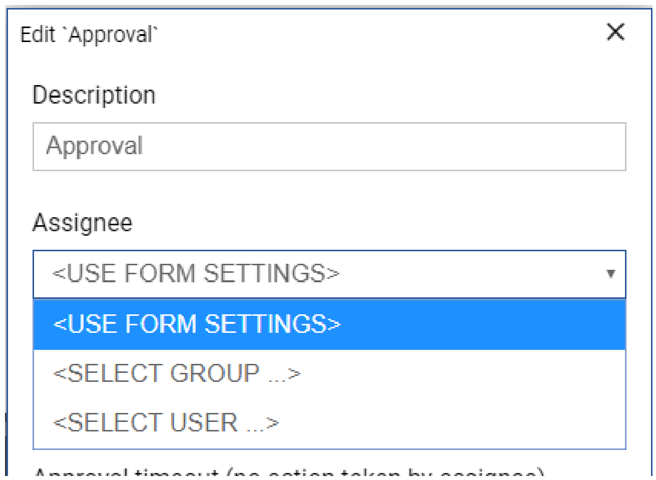


Double click the approval node to edit its properties.

[FAQ] How to ***require approval from default form email address***?

See also: configure default form email address

1. Double click the Approval node to edit its properties
2. Select <USE FORM SETTINGS> in field Assignee

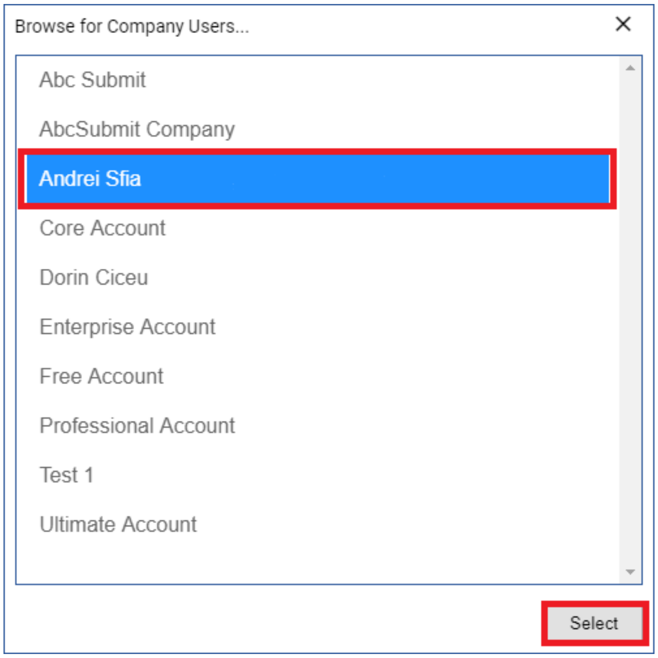


[FAQ] How to ***require an approval from a user of my company***

[IMPORTANT]: You must have the right to manage company (be the company owner or company admin) in order to enumerate the list of users of a company.

1. Double click the Approval node to edit its properties
2. Select **<SELECT USER>** in field **Assignee**

3. In the window that appears, **click on the desired user**, then **press Select**:

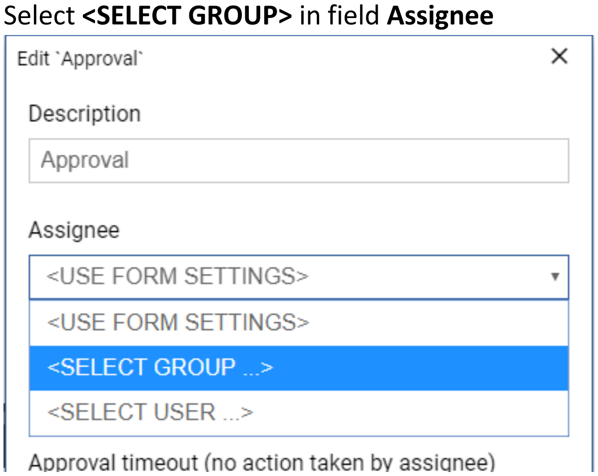


4. **Click Ok** to apply changes

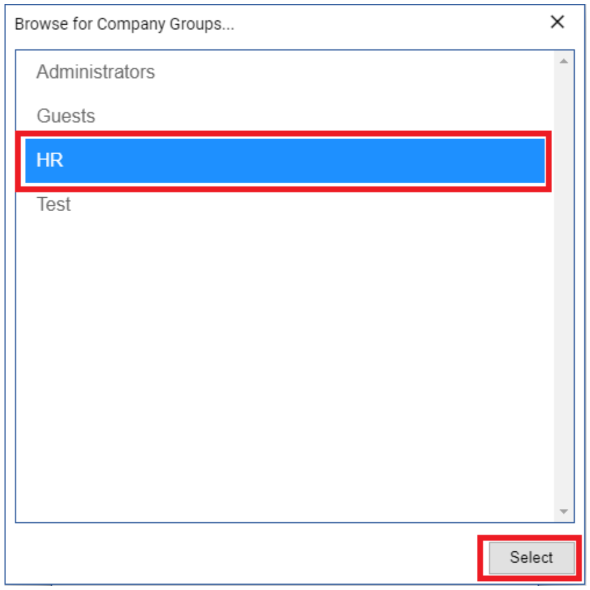
[FAQ] How to **require an approval from a group of my company**

[IMPORTANT]: You must have the right to manage company (be the company owner or company admin) in order to enumerate the list of groups of a company.

1. Double click the Approval node in order to edit its properties
2. Select **<SELECT GROUP>** in field **Assignee**



3. In the window that appears, **click on desired group** of users, **then click on "Select"** button



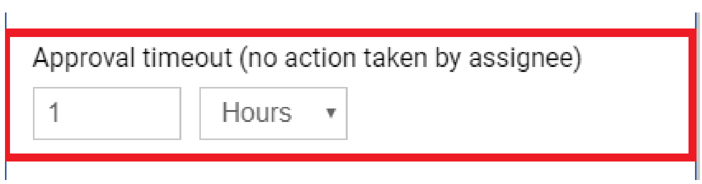
4. **Click Ok** to apply changes

*[FAQ] How to **edit the approval email notification** message*

The same procedure from edit or select notification message applies here also.

*[FAQ] How to **edit the timeout of the "No Action" approval branch**?*

1. Double click the Approval node in order to edit its properties
2. Edit section **"Approval timeout"**:

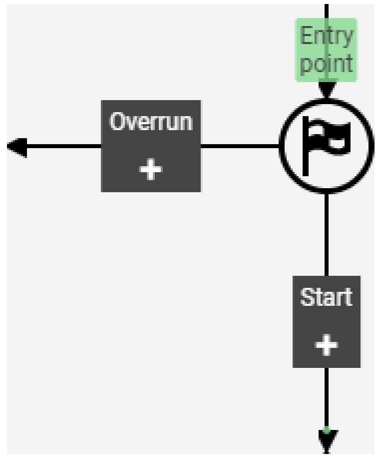


3. **Click Ok** to apply changes

*[FAQ] **How many approvals can I add inside a workflow**?*

There is no limitation on the number of approval operations which can be chained (cascaded) in a workflow (unless your subscription is of type Free or Core, where you cannot add at all an Approval block).

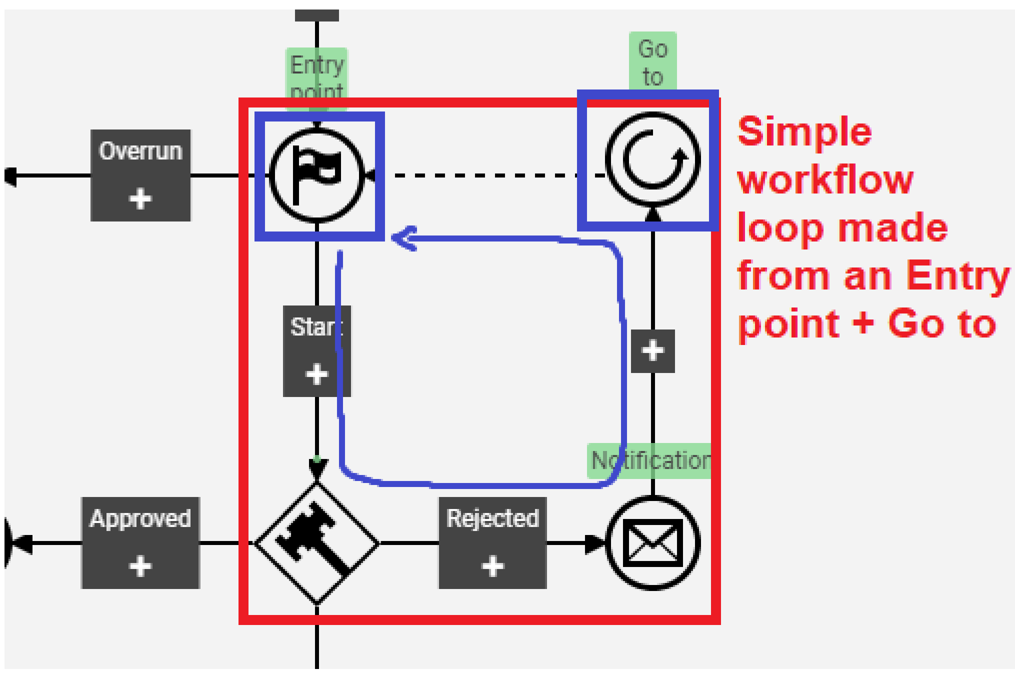
5.1.6. **Entry point** (workflow node) (aka. Label)



The **Entry point** workflow node is used as a **starting point for the beginning of a loop** inside a workflow.

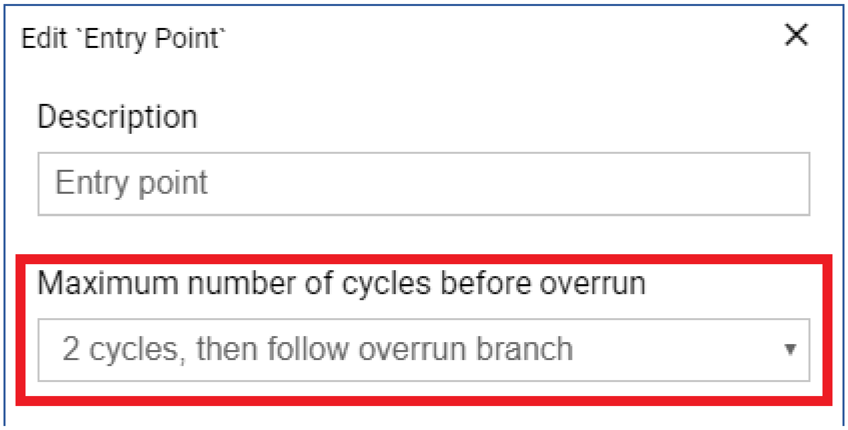
Workflow will loop through an Entry point only a limited number of times (in order to avoid an infinite loop), **after which the branch Overrun is followed automatically**.

Use the **Go To** workflow node, in order to perform a “jump” back to the Entry point:



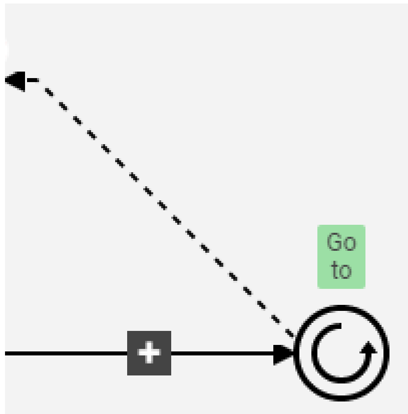
*[FAQ] How to **modify the maximum number of cycles of an Entry point**?*

1. Double click the Entry point node
2. **Select** desired **maximum number of cycles** of the Entry point node



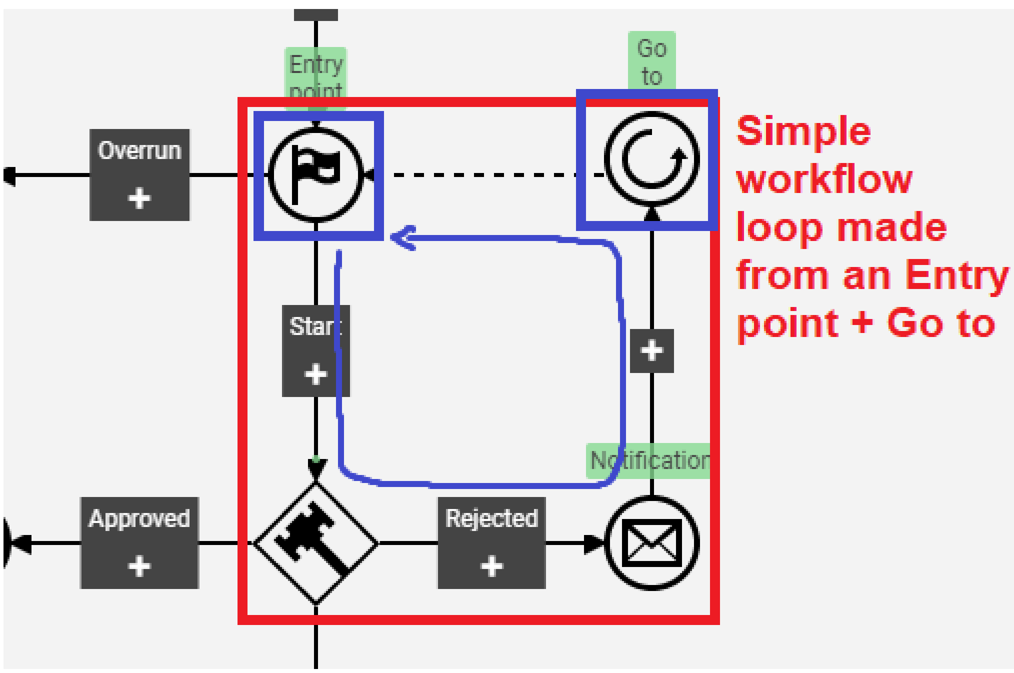
3. **Click Ok** to apply changes

5.1.7. Go to (workflow node) (aka. Jump)



The **Go to** workflow node is used to **perform a jump in the workflow to an Entry point**. It usually marks the end of a loop inside a workflow.

Use the **Go To** workflow node, in order to perform a “jump” back to the Entry point:



5.1.8. **Request edit** (workflow node)

The Request edit workflow node is used for sending to a recipient an email with a link which is used to edit the form result. After the recipient edits the data from form result, workflow execution continues.

*[FAQ] How to **request** a form **result editing from default form email address**?*

The same procedure from Notification block applies here.

*[FAQ] How to **request** a form **result editing from a user of my company**?*

The same procedure from Notification block applies here.

*[FAQ] How to **request** a form **result editing from a group of users of my company**?*

The same procedure from Notification block applies here.

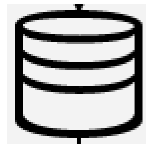
*[FAQ] How to **request** a form **result editing from** user which filled the form, or **a form field**?*

The same procedure from Notification block applies here.

*[FAQ] How to **edit or select the Request edit email notification message**?*

The same procedure from Notification block applies here.

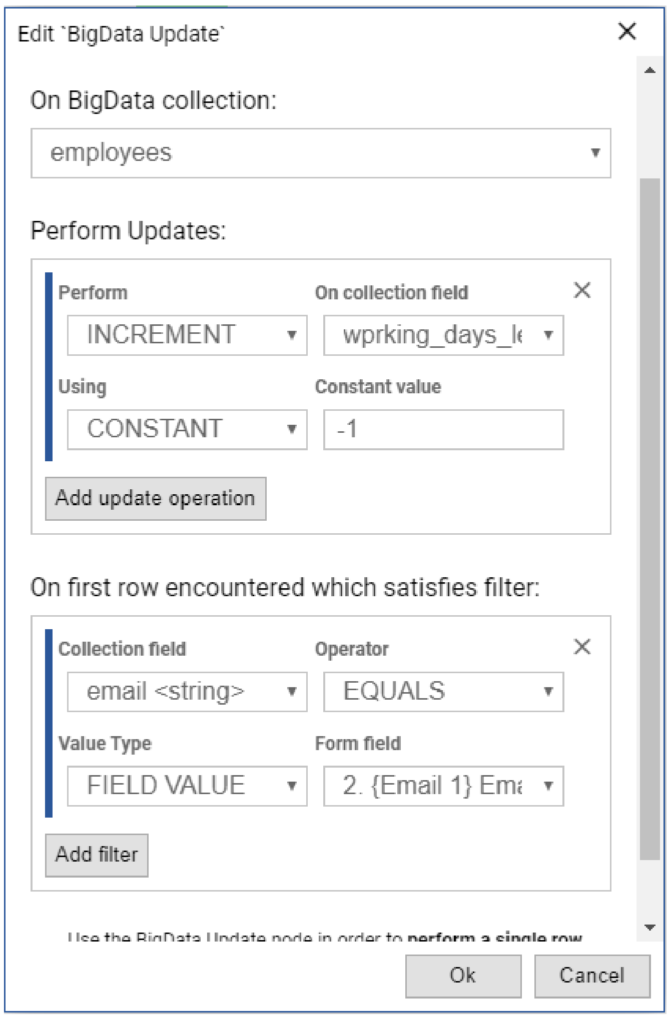
5.1.9. **BigData update** (workflow node)



The **BigData update** workflow node **performs a list of update operations** (SET, INCREMENT, DECREMENT) **to the first encountered row of a BigData collection which satisfies a filter you specify**.

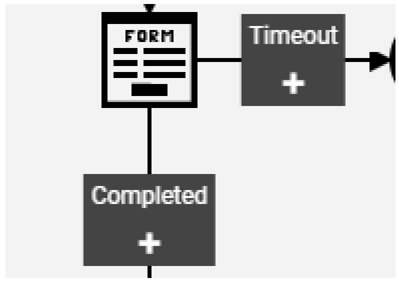
Both **filter and update operations** can be static, or **can be dependent on values from the form result**.

At least one update operation and one filter condition must be specified in the settings of a BigData update node.



Configuration example (described in SQL): "**UPDATE employees SET working_days_left = working_days_left – 1 WHERE email = {Email 1} LIMIT 1**" (*{Email 1} is the name of a form field*).

5.1.10. **Human task** (workflow node)

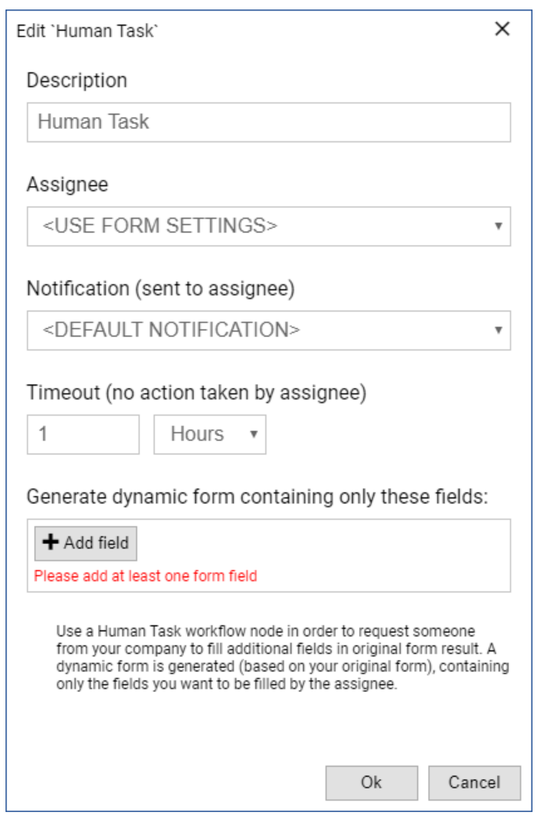


The **Human Task** workflow node **generates a dynamic form with a subset of fields from original form**, **and sends a link to edit that form to an email recipient** (form default email address, user or group from your company, or form field).

If the email recipient fills the dynamic generated form (before timeout expires), the **Completed branch** of the Human task **is followed**.

If the email recipient doesn't fill the form in the specified amount of time (no action), the **Timeout branch** of the Human task **is followed**.

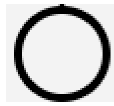
Double click Human Task workflow node in order to edit its properties:



[FAQ] I want to ***generate a Human Task dynamic form with a set of fields which are not available in original form***

This is why we created Hidden Short text and Hidden Long text form fields. Please add in original form fields of that type.

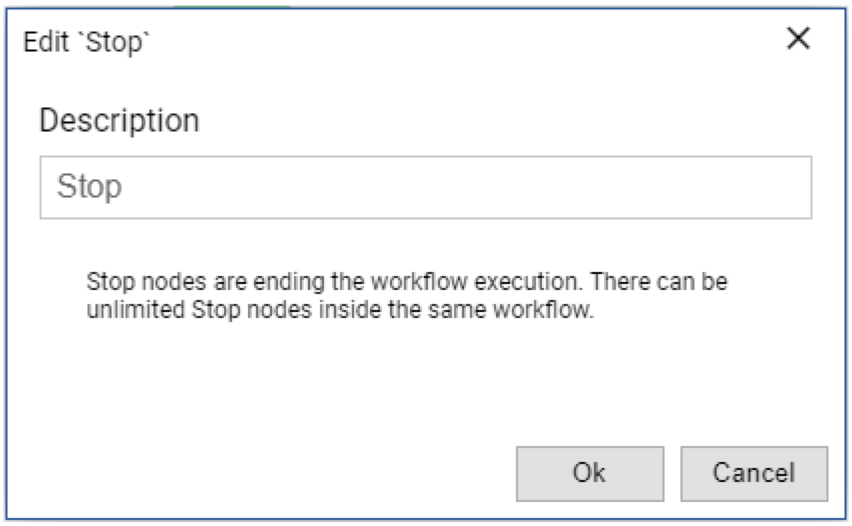
5.1.11. Stop (workflow node)



The **Stop** workflow node terminates the workflow.

As opposed to the Start workflow node, **there can be any number of Stop nodes inside a workflow**.

Double click the Stop workflow node in order to edit its properties:



6. Company management (time to scale, baby)

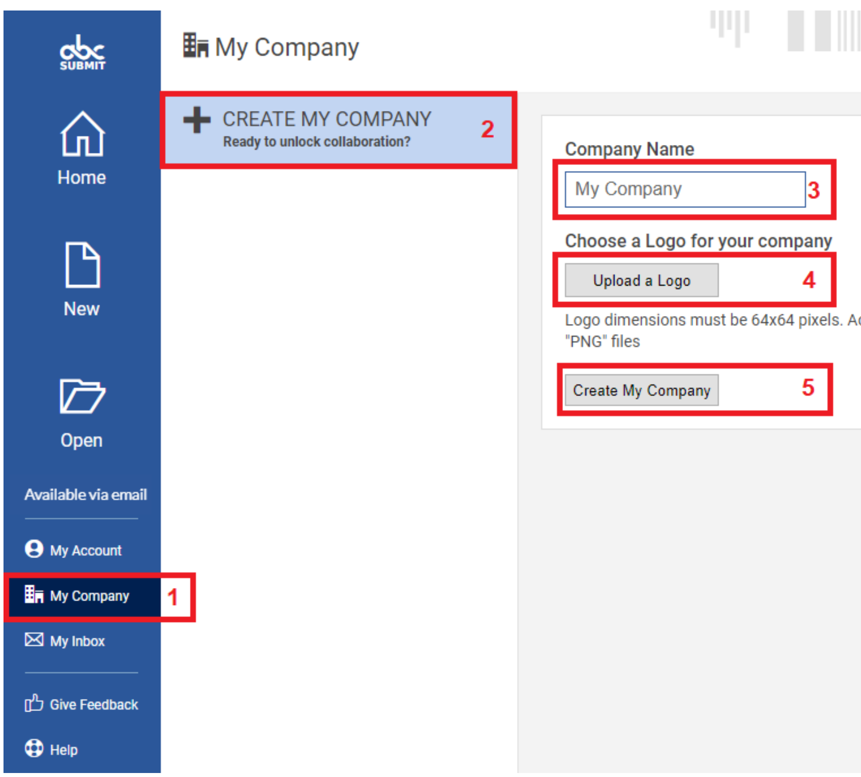
Creating a company on AbcSubmit, helps you to achieve the following features:

- Create a list of forms which can be shared with your company users (via setting "Require Authentication" and "Share this form with the following users or groups of my company").
- Via Workflows, you can select a list of company users or groups which can handle Approvals, receive email Notifications or create Human Tasks.
- Create forms inside your company which can be accessed only by your company users (via form setting "Require Authentication").

6.1. Create your company

[Note] After you create your company, your account will become the company owner. All subscription payments issued by the platform will be addressed only to your account. In case you wish to use another account (email address) for paying invoices, please create your company on that account instead.

Follow these steps in order to create a company on AbcSubmit:

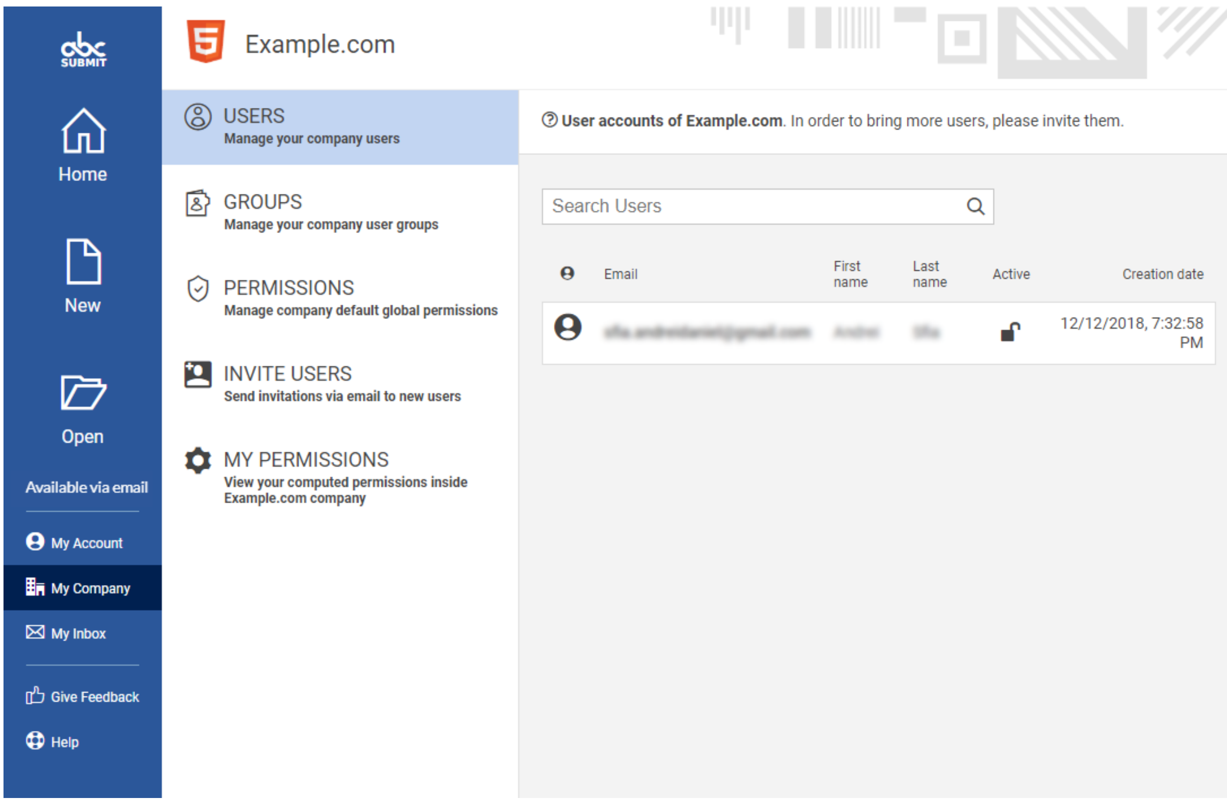


1. From the builder menu, click on "My Company"

2. Click on “CREATE MY COMPANY”
3. In field “Company Name” write the name of your Company
4. Click on button “Upload a Logo”, in order to upload a logo of your company.

   Note: Company logo must be a picture of 64 x 64 pixels, with file extension: “JPG”, “JPEG”, “PNG” or “GIF”.
5. Click on “Create My Company”.

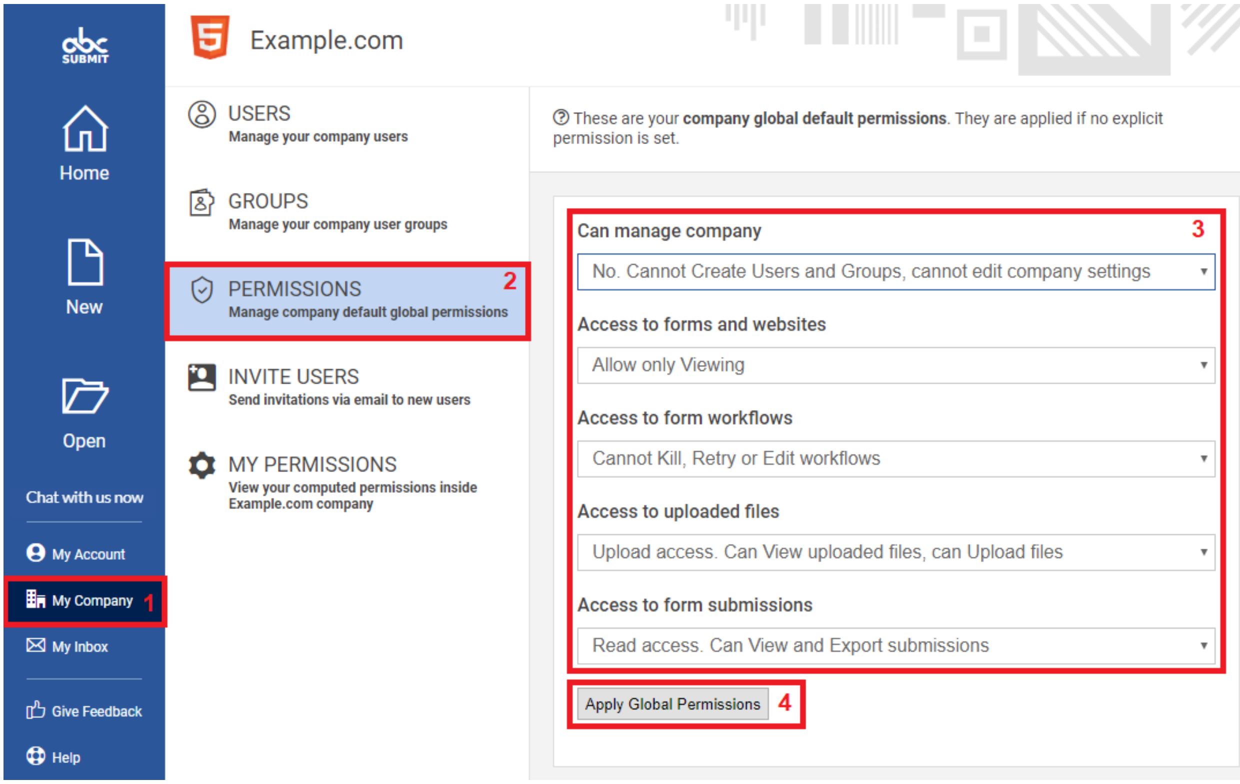
After you have successfully created your company, screen will refresh and company management section will be shown instead:



6.2. Manage your company default permissions

After you successfully created your company, it’s time to **set** its **default permissions**.

Company default permissions are applied to all users which don’t have explicit permissions set.



1. Click on “My Company”
2. Click on “Permissions (manage company default global permissions)”
3. Adjust your company global permissions
4. Click button “Apply Global Permissions”.

[Note]: Company owner (user which created the company) will always have full access in all sections of the product, and its permissions are not affected by company default permissions.

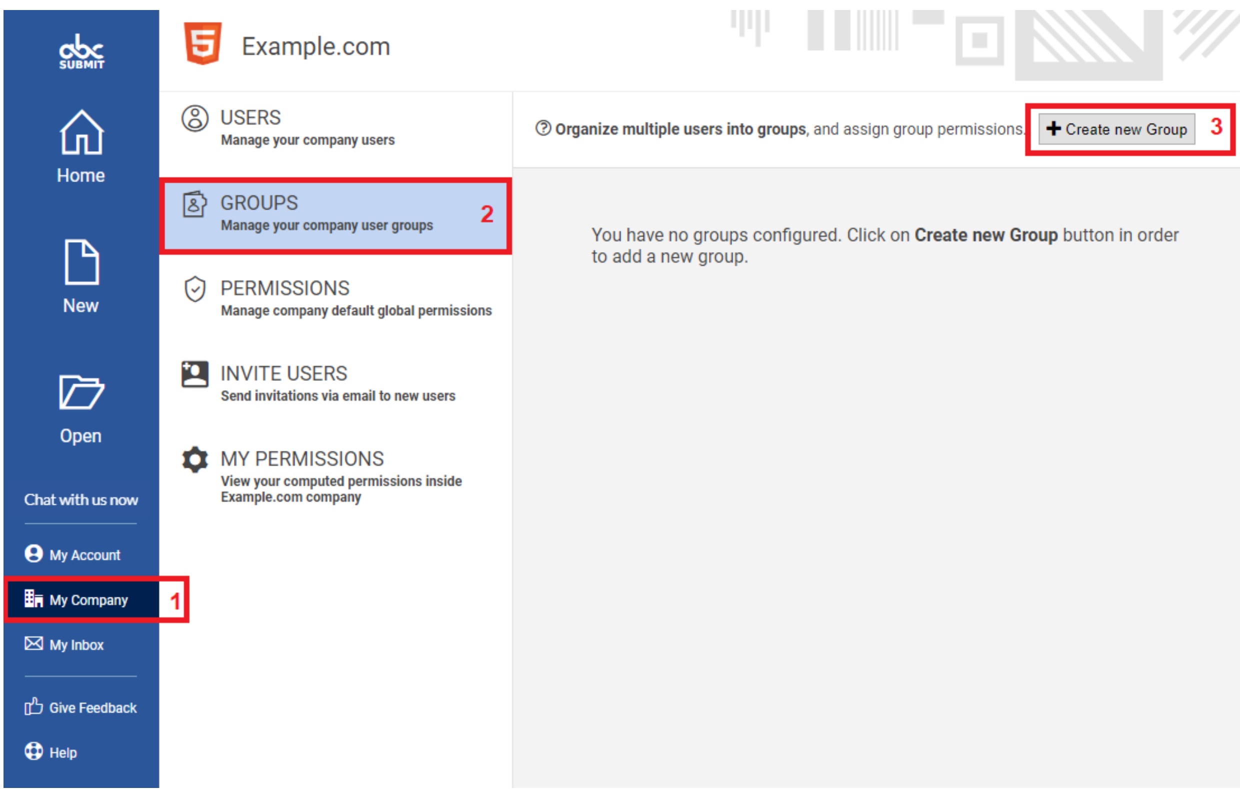
Permission	Value	Description
Can manage company	Yes. Can Create Users and Groups, can edit company settings	**Company admins should have this permission**
	No. Cannot Create Users and Groups, cannot edit company settings	Regular company users should have this permission
Access to forms and websites	Restrict access. Cannot View or Edit documents.	Forbid access to form viewing and editing
	Allow only Viewing	Allow only form viewing
	Allow Viewing and Editing	Allow full form access
Access to form workflows	Cannot Kill, Retry or Edit workflows	No workflows access
	Can Kill, Retry or Edit workflows	Full workflows access
Access to uploaded files	Restrict access. Cannot View, Delete or Upload files	Forbid access to any form / user uploaded file

	Read access. Can only View uploaded files	Allow only file download
	Upload access. Can View uploaded files, can Upload files	Allow only file download / upload
	Write Access. Can View, Upload or Delete files	Full file storage access
Access to form submissions	Restrict access. Cannot View or Delete submissions	Forbid form submissions access
	Read access. Can View and Export submissions	Allow viewing and exporting form submissions
	Write Access. Can View, Export and Delete submissions	Full form submission access

6.3. Company groups

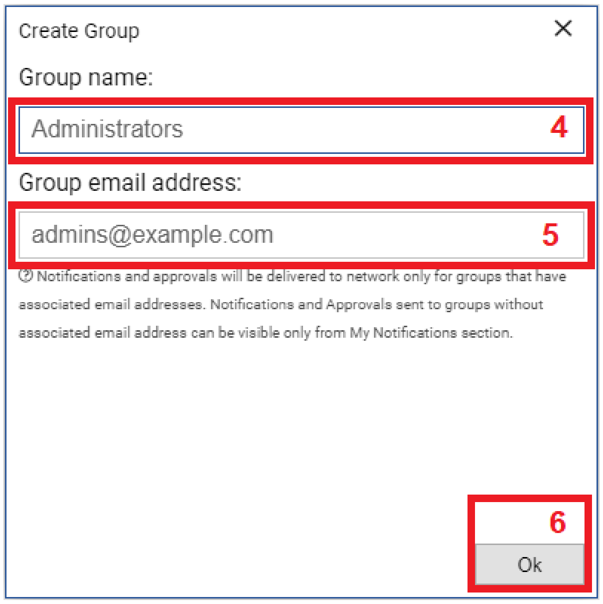
Company groups are a convenient way of structuring the departments of your company. You can assign permissions to each company group, and join multiple users into a group. Permissions of the group are propagated to each user account which is member of the group.

6.3.1. Create new group



1. Click on “**My Company**”
2. Click on “**Groups**”
3. Click on button “**Create new group**”

A window with title “Create Group” will appear:



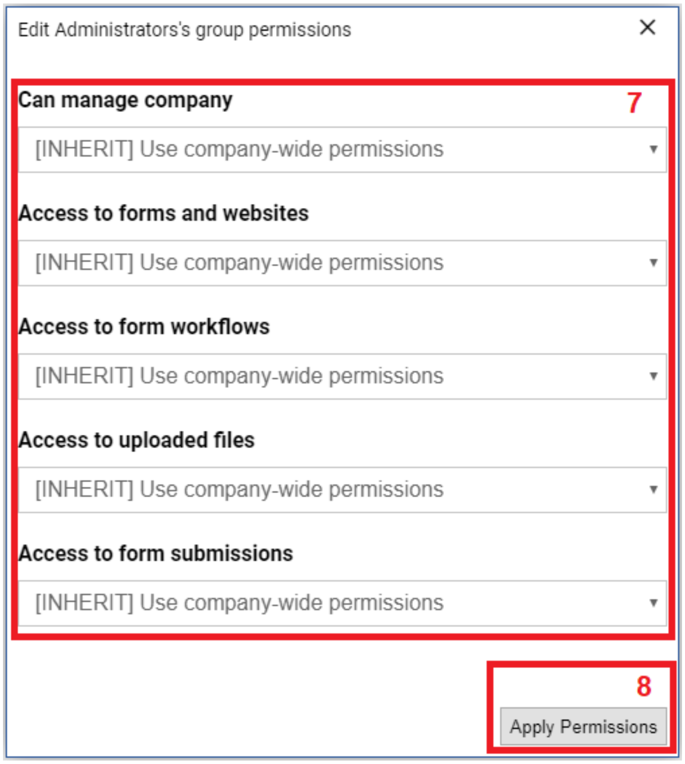
4. In field “Group name” type the name of the group (e.g.: Administrators)

5. **Optionally <u>but</u> Recommended**, in field “Group email address” type group email alias used internally in your company.

   [NOTE]: If you don’t specify a group email alias, email messages generated by workflows will not be sent to each individual user from this group. Instead, **users of this group will be able to access their email notifications ONLY from section “My Inbox”**.

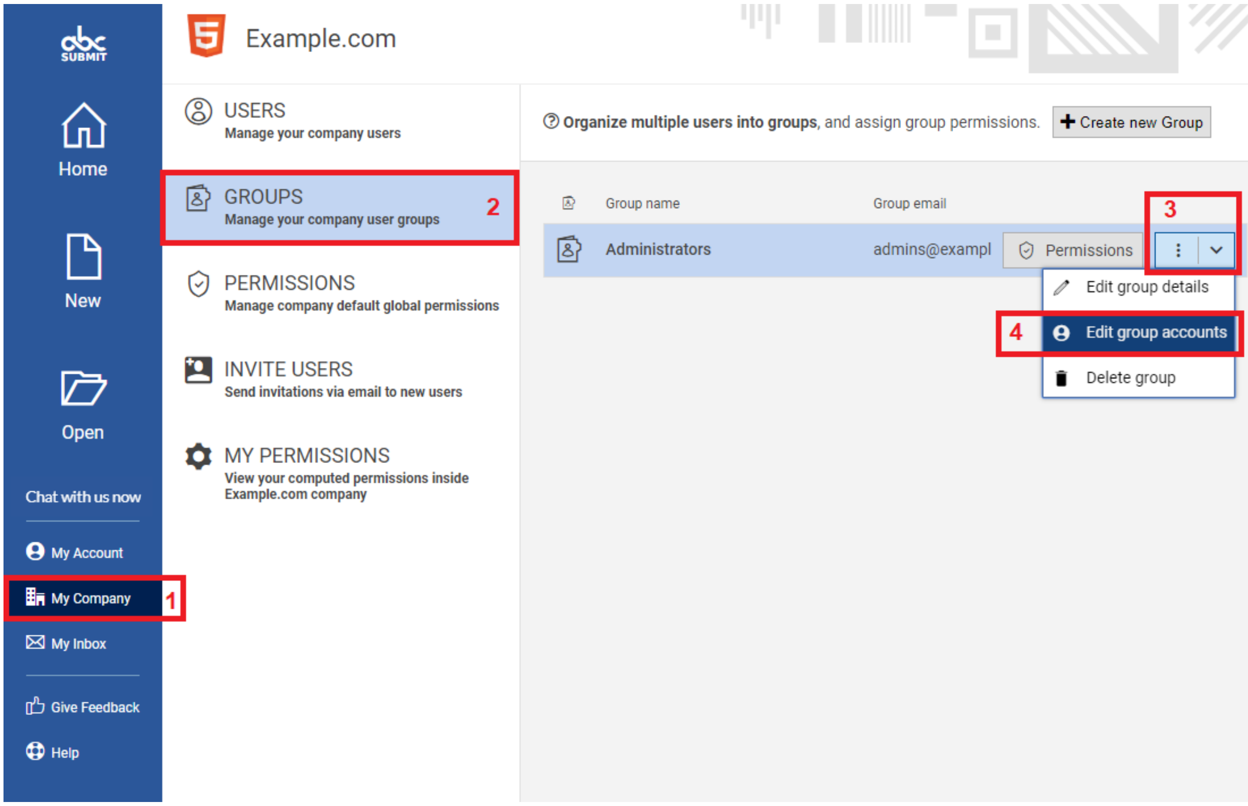
6. Click Ok

At this point, group is created. You will be prompted to edit permissions for this group in the next window that appears:



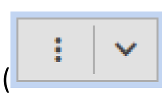
7. **Optionally, set permissions which will be applied to all the users which will join this newly created group**
8. Click on button "**Apply Permissions**"

6.3.1. Add or Remove existing users to a group



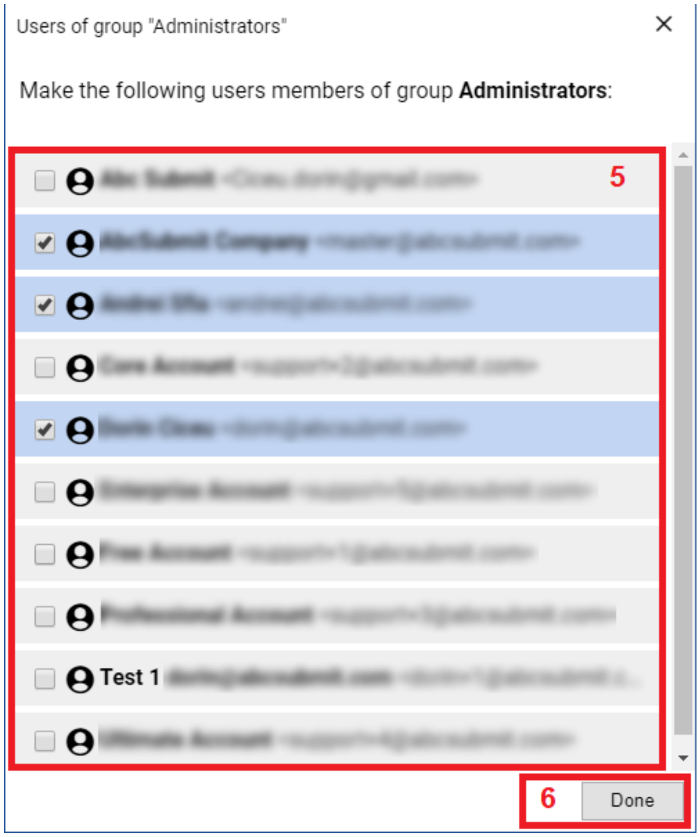
1. Click on "My Company"

2. Click on "Groups (manage your company user groups)

3. Click on more actions button () of the group you wish to add / remove users

4. Click on "Edit group accounts"

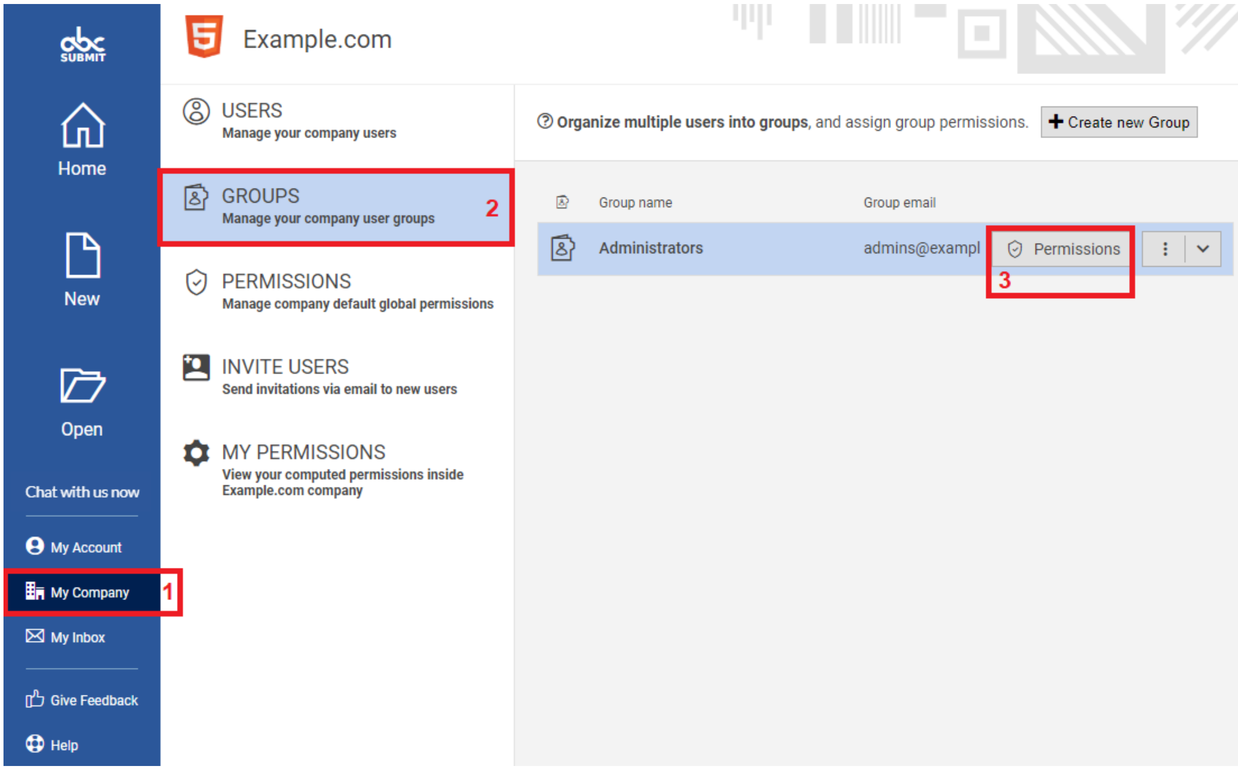
A window will appear:



5. Check (to add) or uncheck (to remove) user accounts this group contains.

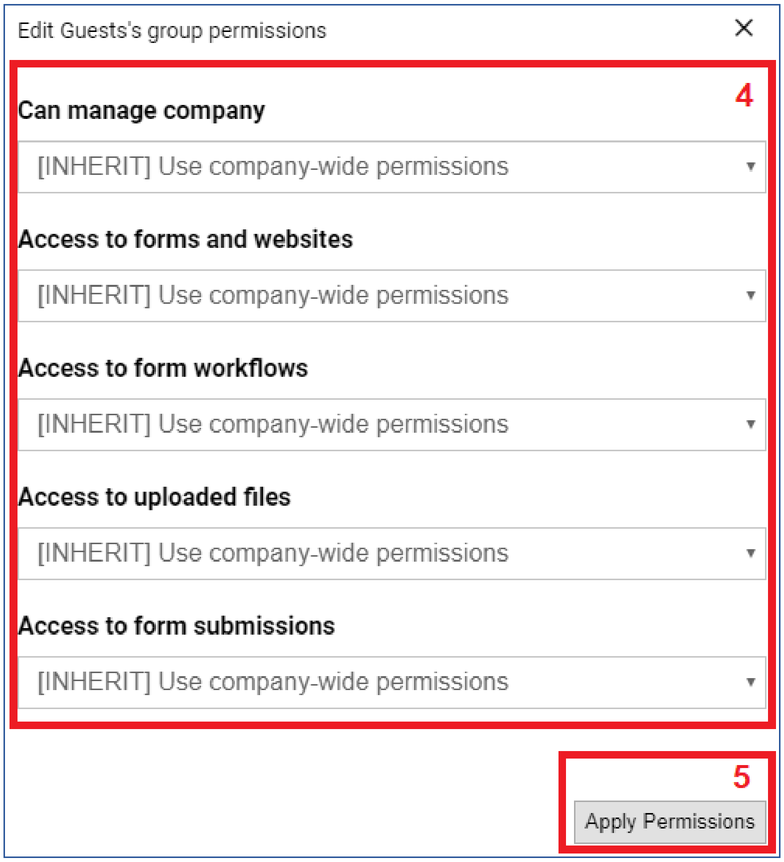
6. Click “Done”

6.3.2. Edit permissions of an existing group



1. Click on “My Company”
2. Click on “GROUPS (manage your company groups)”
3. Click on button “Permissions” on the group you wish to change its permissions

A new window appears:

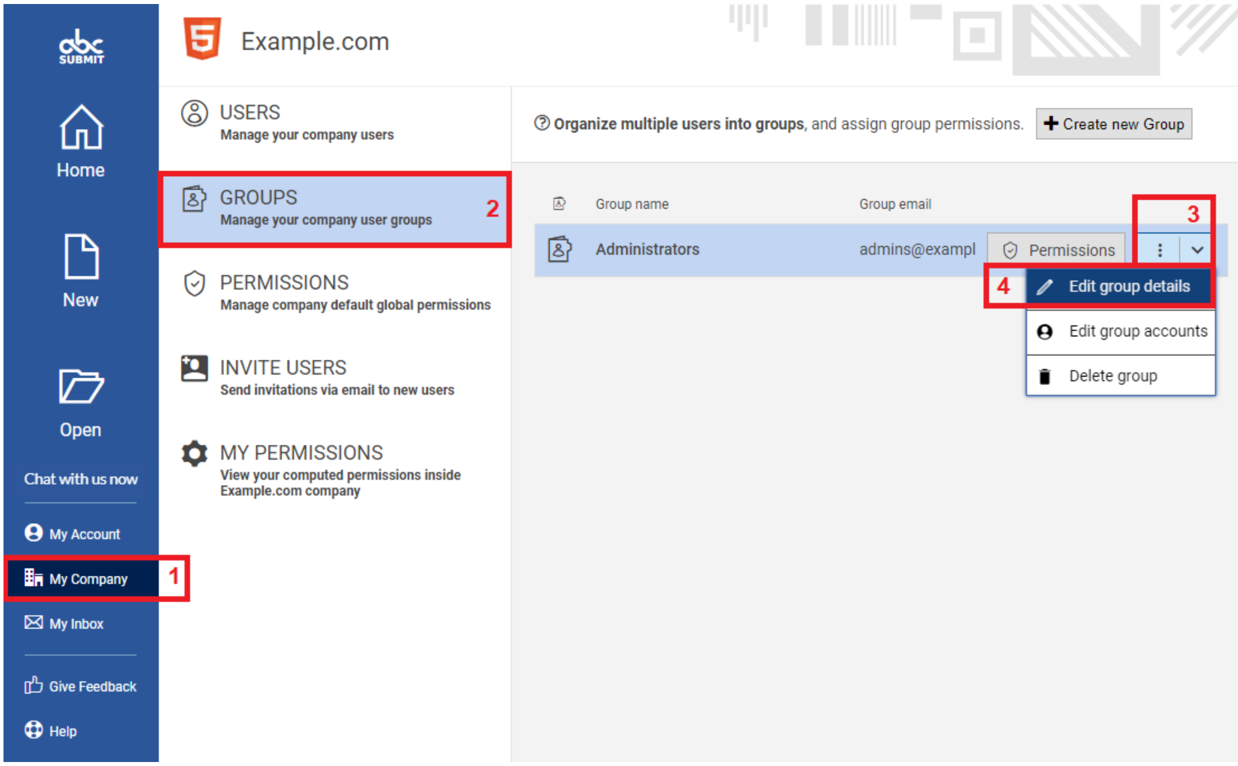


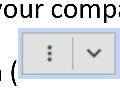
4. **Modify** group **permissions** by selecting them from the permission dropdowns.

   [NOTE]: By selecting **[INHERIT] Use company-wide permission**, the Company default global permission value will be used.

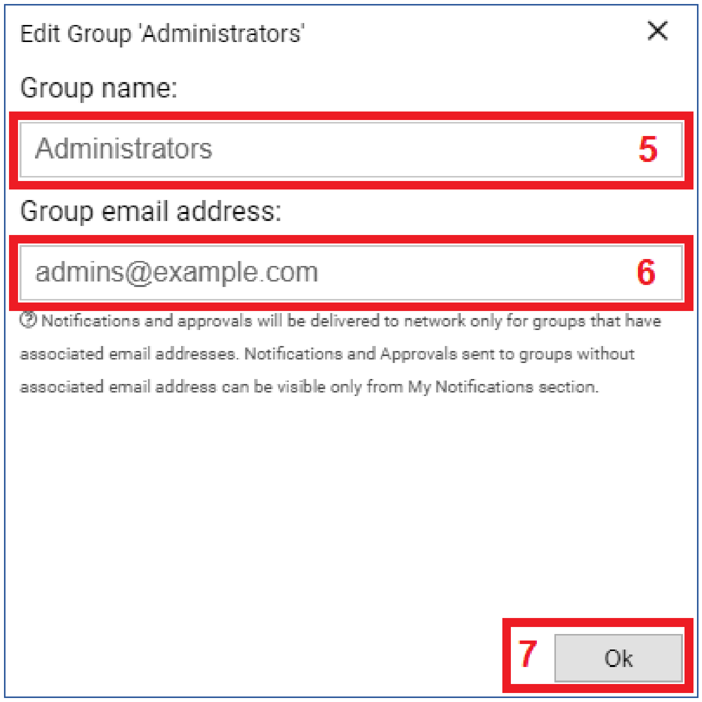
5. Click on "**Apply Permissions**" button

6.3.3. Modify a group name or email address / alias



1. Click on “**My Company**”
2. Click on “**GROUPS** (manage your company user groups)
3. Click on **more actions** button () on the group you want to edit its name or email address
4. Click on “**Edit group details**”

A window will appear, from where you can edit group name and email address:



5. **Optionally**, modify the name of the group
6. **Optionally**, modify the group email alias used inside your company

   [NOTE]: If you don't specify a group email alias, email messages generated by workflows will not be sent to each individual user from this group. Instead, **users of this group will be able to access their email notifications ONLY from section "My Inbox"**.

7. **Click** button "**Ok**".

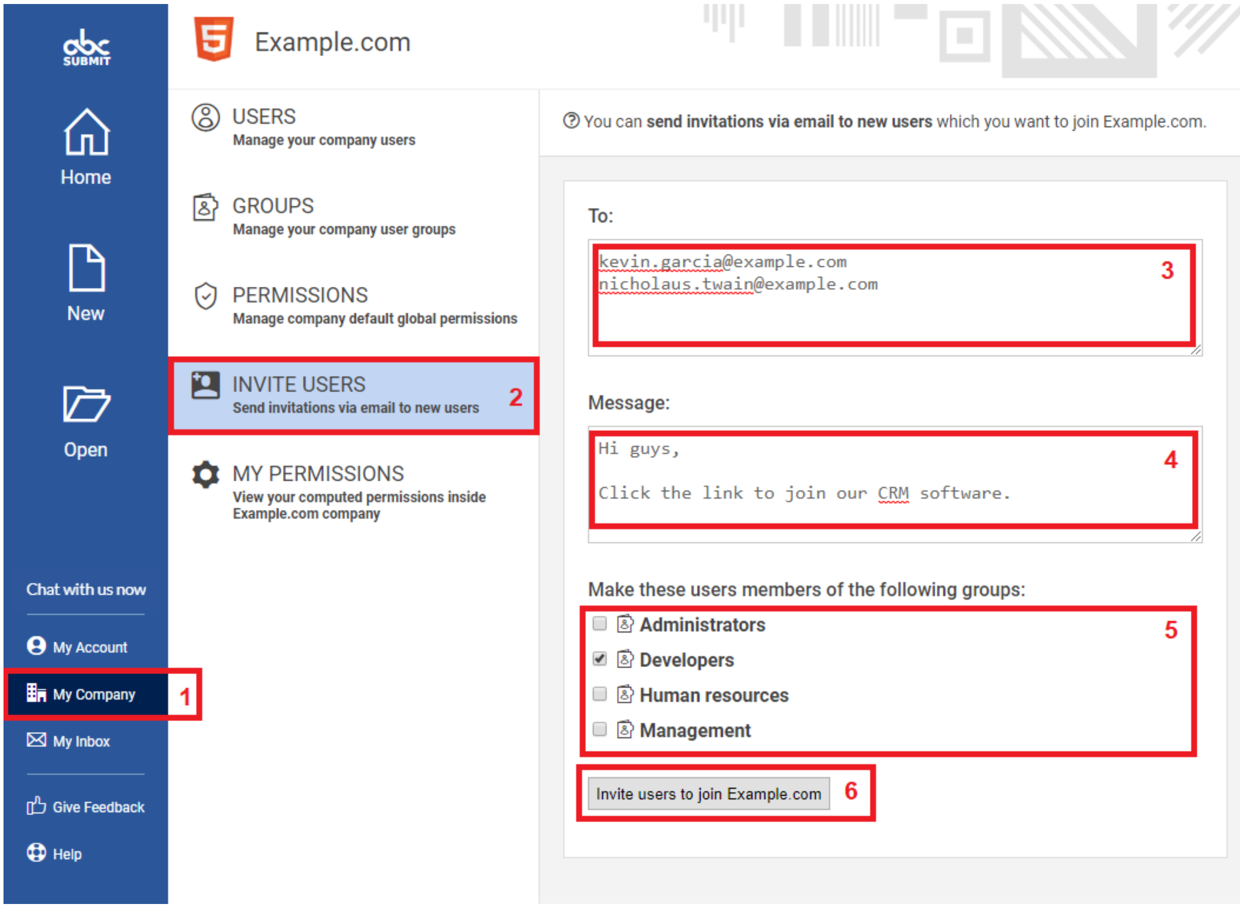
6.4. Invite users to join your company

[Note]: It is recommended to first create some company groups before inviting users in your company, because you will have the opportunity to automatically join invited users in a list of groups you specify.

Now that you configured your company default permissions, it's time to invite users to join your company.

Invitations are sent via email, and they contain a link to join your company. When the user clicks on the link from email, a browser page will be opened where they can edit their personal info (first name, last name, and setup their password).

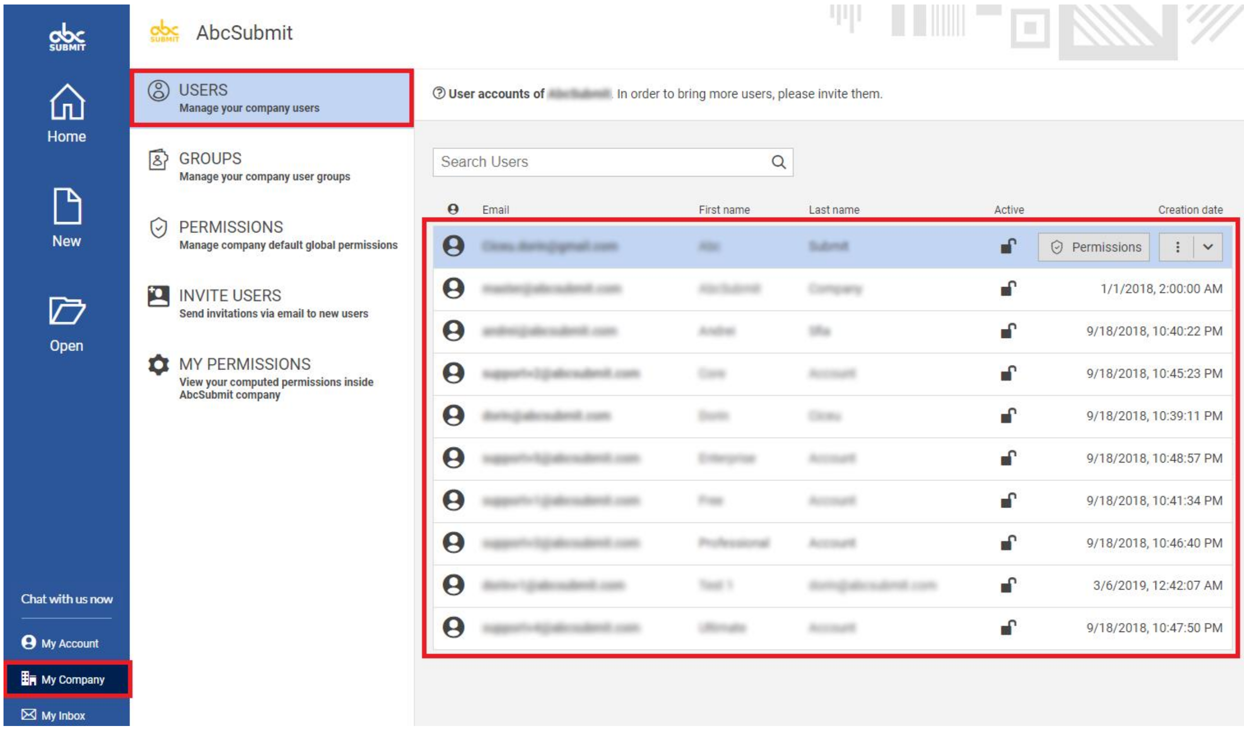
You can invite maximum 10 users at a time.



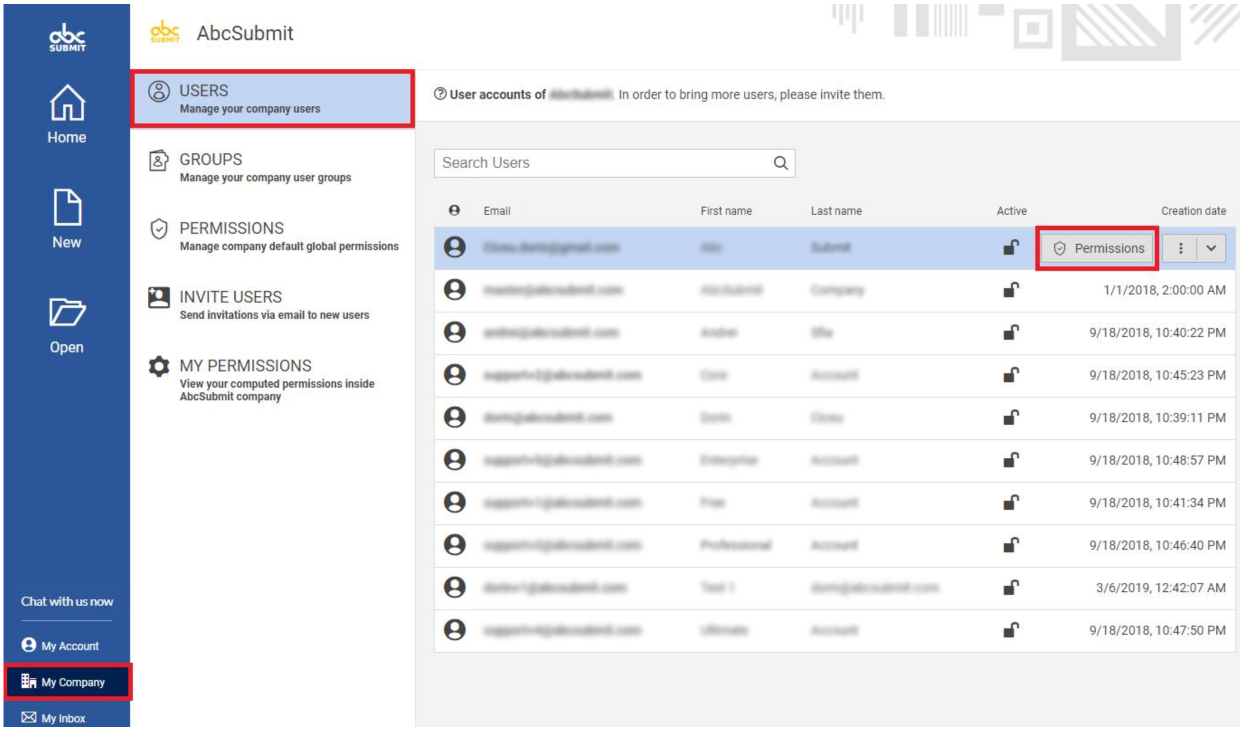
1. Click on "**My Company**"
2. Click on "**INVITE USERS** (*send invitations via email to new users*)
3. In field "**To**", write user email addresses, each mail address on a new line
4. In field "**Message**", write a text that will be inserted into invitation mail
5. Optionally, you can auto-join invited users to the list of groups you specify in the list "**Make these users members of the following groups**"
6. Click on button "**Invite users to join** <name_of_your_company>"

6.5. Company users

After you invite users to join your company, they will appear in your **USERS** section from “**My Company**”:

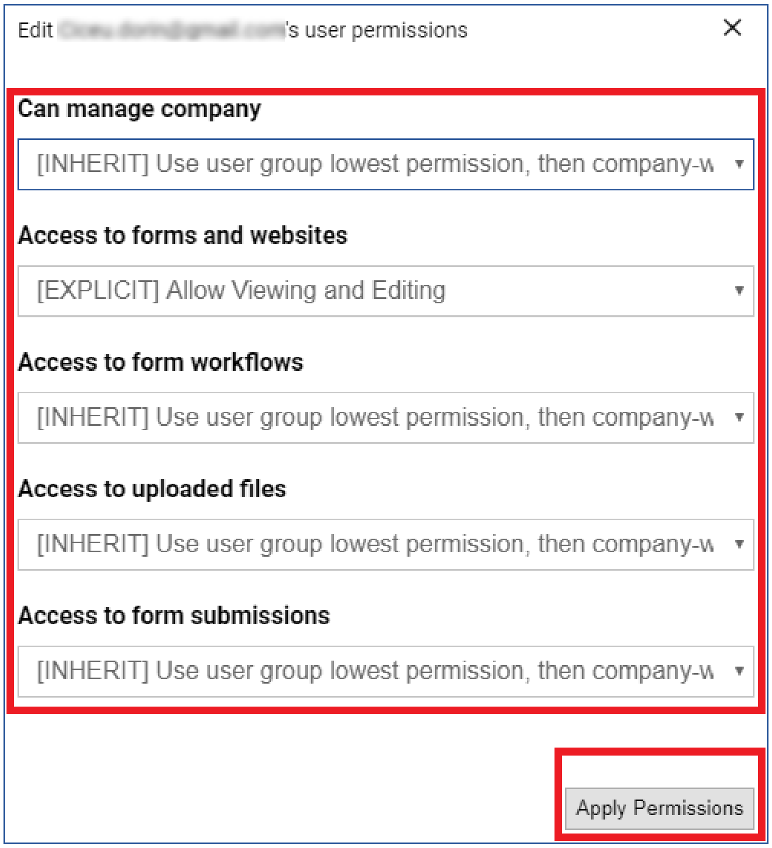


6.5.1. Edit user permissions



1. Click on “My Company”
2. Click on “USERS (manage your company users)
3. Click on button “Permissions” on the user you wish to modify its permissions

A window will appear, from where you can edit user permissions:



4. Modify user permissions
5. Click on button “**Apply Permissions**”

[FAQ] How user permissions are computed?

If user has an explicit permission, explicit permission is used

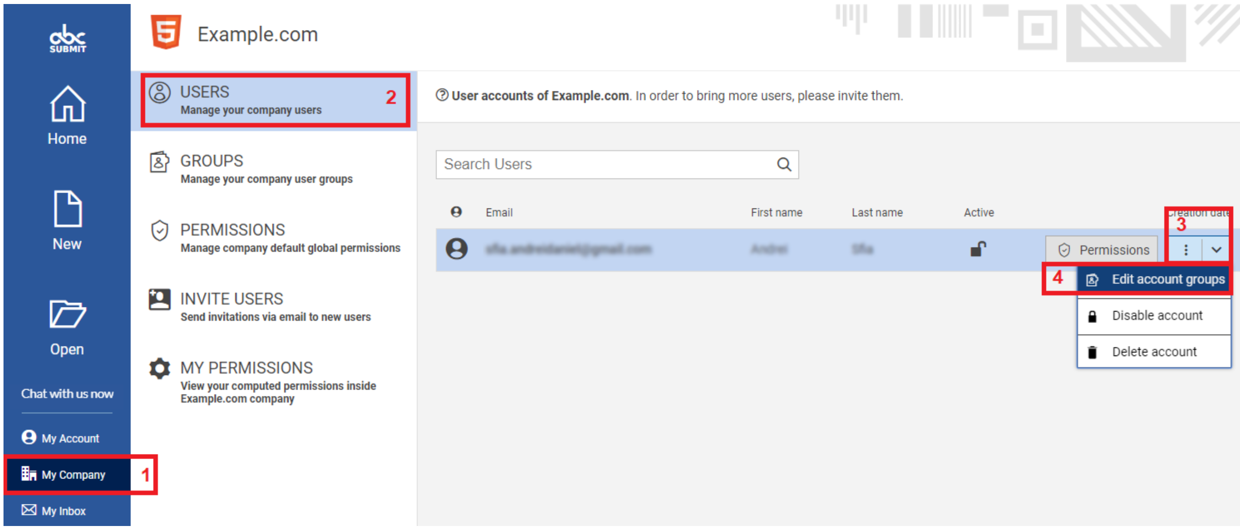
Otherwise:

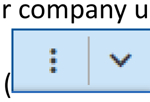
> **If** user is member of a group, and that group have that **permission set in explicit mode**, group explicit permission is used.
>
> **If user is a member of two or more groups**, and it has explicit permissions set on more than one group, **the most restrictive permission is used**.

Otherwise:

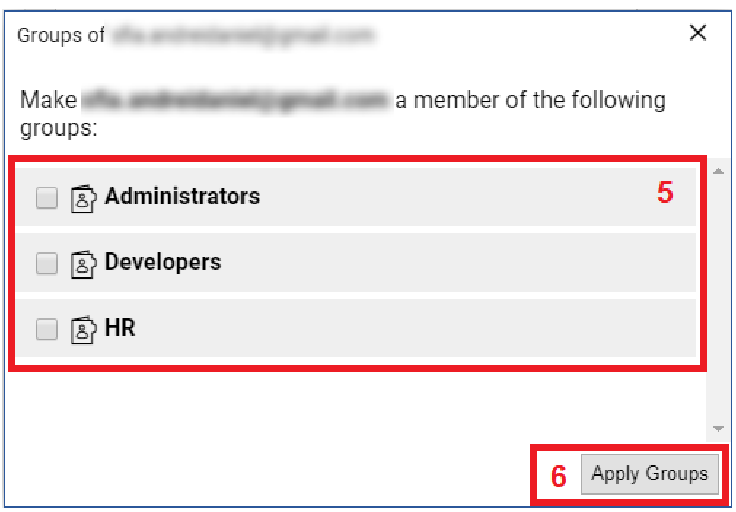
> Value specified in Company default permissions is used

6.5.2. Make user member of company group(s)



1. Click on “**My Company**”
2. Click on “**USERS** (manage your company users)”
3. Click on **more actions** button ()
4. Click on “**Edit account groups**”

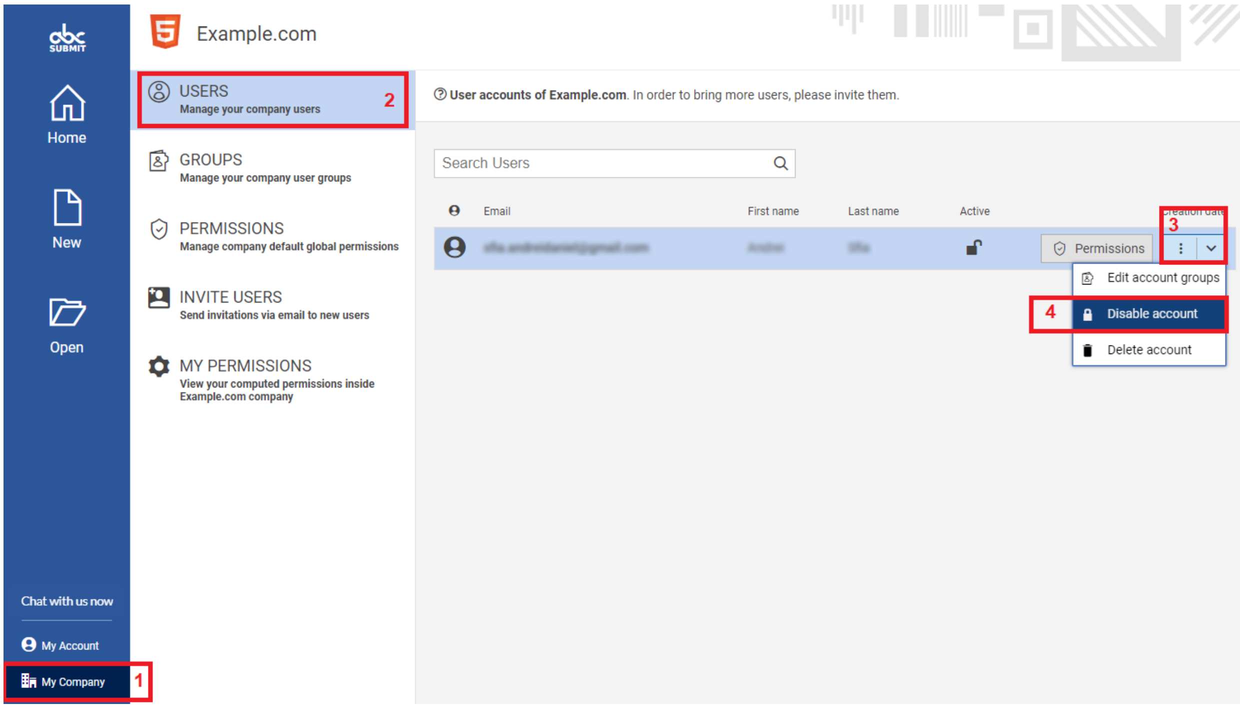
A window will open, from where you can select user groups:

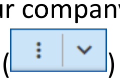


5. **Select groups** you wish this user to be member of
6. Click on button “**Apply Groups**”

6.5.3. Enable or Disable user

[NOTE]: Only company owner / company administrators can enable or disable a user account.



1. Click on "**My Company**"
2. Click on "**USERS** (Manage your company users)
3. Click on more actions button () on the user you wish to enable or disable
4. Click on "Disable account" (option visible if account is Enabled in that moment) or "Enable account" (option visible if account is Disabled in that moment).
5. A confirmation message appears. Click Ok if you wish to perform operation.

[NOTE] Company owner (user which created the company) cannot be disabled.

7. BigData collections

BigData collections is a MongoDB database storage provided by AbcSubmit which helps you to store vast amount of structured data (fixed collection schema support).

With the help of BigData collections, you can:

- Add in your form a dropdown with dynamic options
- Create forms with dynamic auto-fill features, by using BigData row viewer form field
- Manipulate the data from a collection with the help of the Workflows BigData Update node, or with the help of the BigData form integration.
- Access and query collection data via REST api endpoint
- Create advanced form fields which can access your collection data, with the help of the Code field.

Here are some starting point ideas you can use BigData collections for:

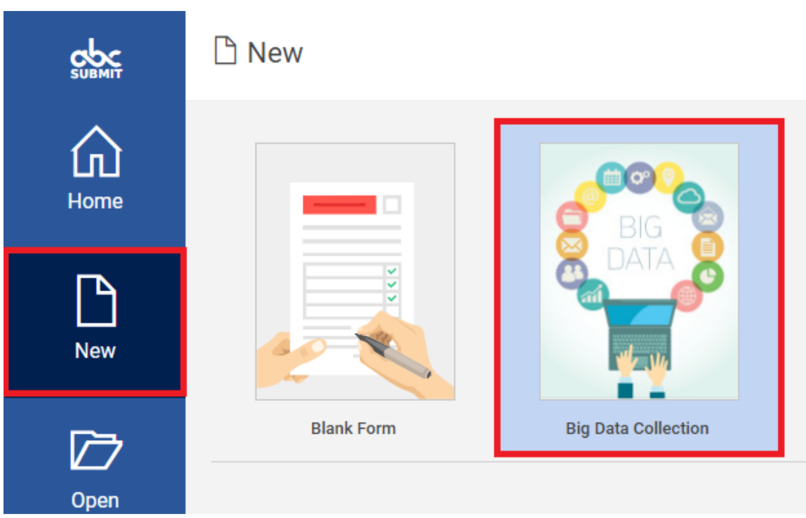
- Creating a Holiday request form, which query a BigData collection for finding out the number of remaining holiday days an employee still has.

- Product stock system

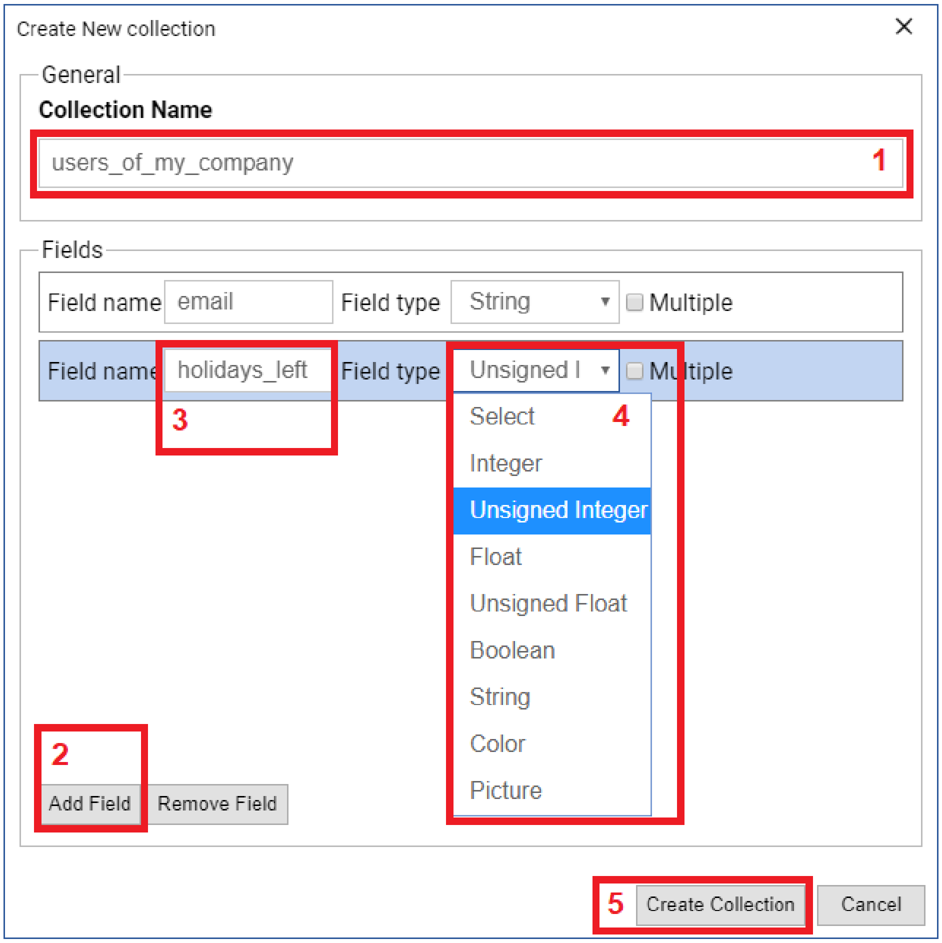
- Advanced listing of items (products, persons, contacts, etc.) (using custom HTML, CSS, Javascript and REST) inside a form using the Code field.

7.1. Create new BigData collection

In the main menu click on "New", then click "Big Data Collection":



A new window will appear, from where you can edit the structure (schema) of your collection:



1. In “**Collection Name**” field, input the name of your BigData collection

   [NOTE]: A BigData collection **name must respect the following conventions**:
   a. **Must start with** a letter (a..z, or A..Z)
   b. **Can contain only** characters a..z, A..Z, _ (underline), 0..9 (digits)
   c. Name of collection **must be unique across your account / company**

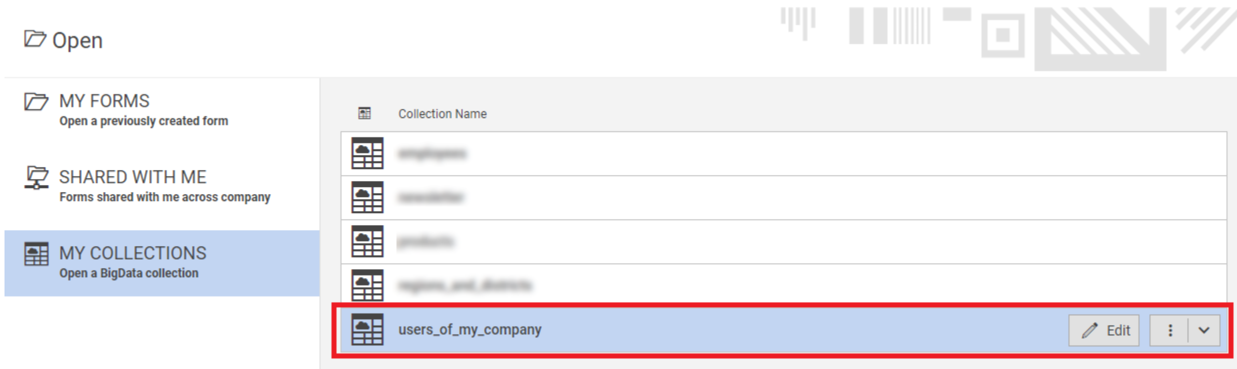
2. Click on button “Add Field” to add as many fields you wish inside your collection
3. Edit the name of the added fields

   [NOTE]: A BigData collection **field name must respect the following conventions**:
   a. Must start with a letter (a..z, or A..Z)
   b. **Can contain only** characters a..z, A..Z, _ (underline), 0..9 (digits)
   c. Name of the field **must be unique inside your collection**.

4. For each added field, select the data type used to store values

   [NOTE]: Consult the types of data supported by a collection.

5. Click on button “**Create Collection**”
6. Your collection is ready to be used:



Next optional steps?

- Add indexes to your collection in order to create unique columns or make your collection data search faster
- Import data in your collection from a CSV file

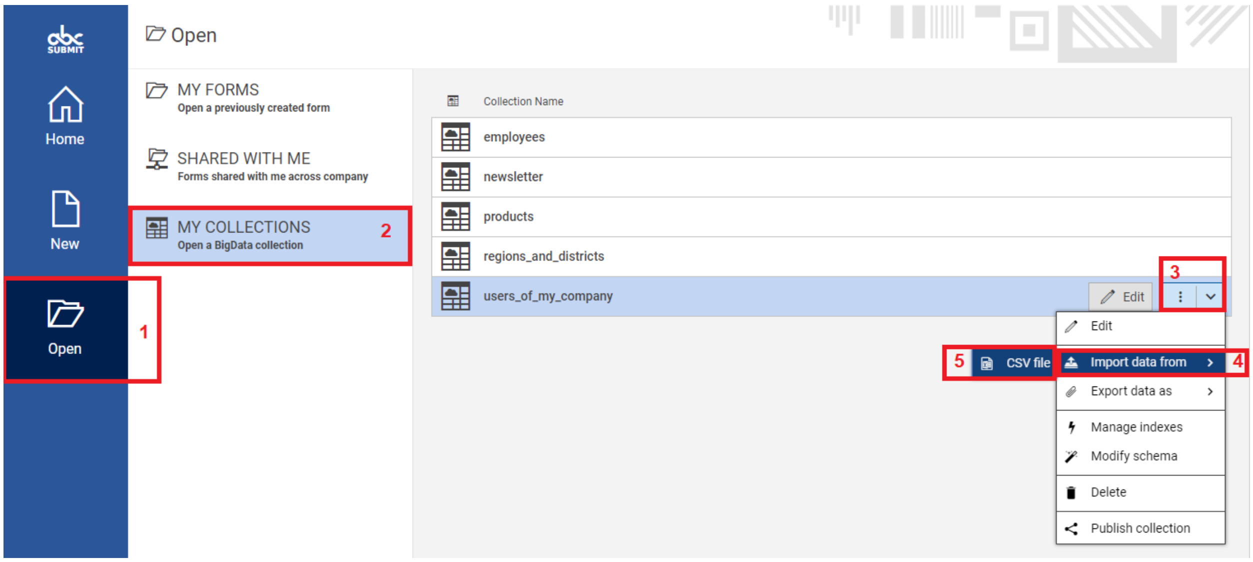
*[FAQ] What **types of data** are **supported by a BigData collection**?*

The following data types are supported by a field:

Data type	Sample values	Comments
Integer	Natural numbers (positive or negative): -n, …, -3, -2, -1, 0, 1, 2, 3, …, n	Numbers without a decimal point
Unsigned Integer	Positive-only natural numbers: 0, 1, 2, 3, …, n	Numbers without a decimal point >= 0
Float	Decimal numbers (positive or negative): -772.23, -71, 2.68927732, 2883223.2128	Decimal point numbers (and also integer numbers)
Unsigned Float	Positive-only decimal numbers: 12.23, 0, 0.0001, 728932.2378927812	Decimal point numbers >= 0 (and also integer numbers >= 0)
Boolean	true or false	Only true or false are supported
String	Any UTF-8 text (non-binary text) up to 4 Mb: “Marry”, “jasdk1p2i3p1o2k3asd”, etc.	Any (single line or multi line) text which can be written by a computer keyboard.
Picture	A text representing an URL to a picture located on the web: “https://www.abcsubmit.com/img/file.jpg”	You can upload pictures when you edit your collection
Color	A text used to represent a CSS color: “#000023”, “black”, “rgba(0,0,0,2)”, etc.	You can select colors when you edit your collection

7.2. Import data into a BigData collection

After you create your collection, you have the opportunity to populate your collection with data from a **CSV file**.



For this tutorial, we're importing a CSV file named "users_of_my_company.csv", with the following structure:

	A	B	C
1	**email**	**name**	**holidays_left**
2	jack.sparrow@example.com	Jack Sparrow	22
3	george.sullivan@example.co	George Sullivan	15
4	michael.kerry@gmail.com	Michael Kerry	16

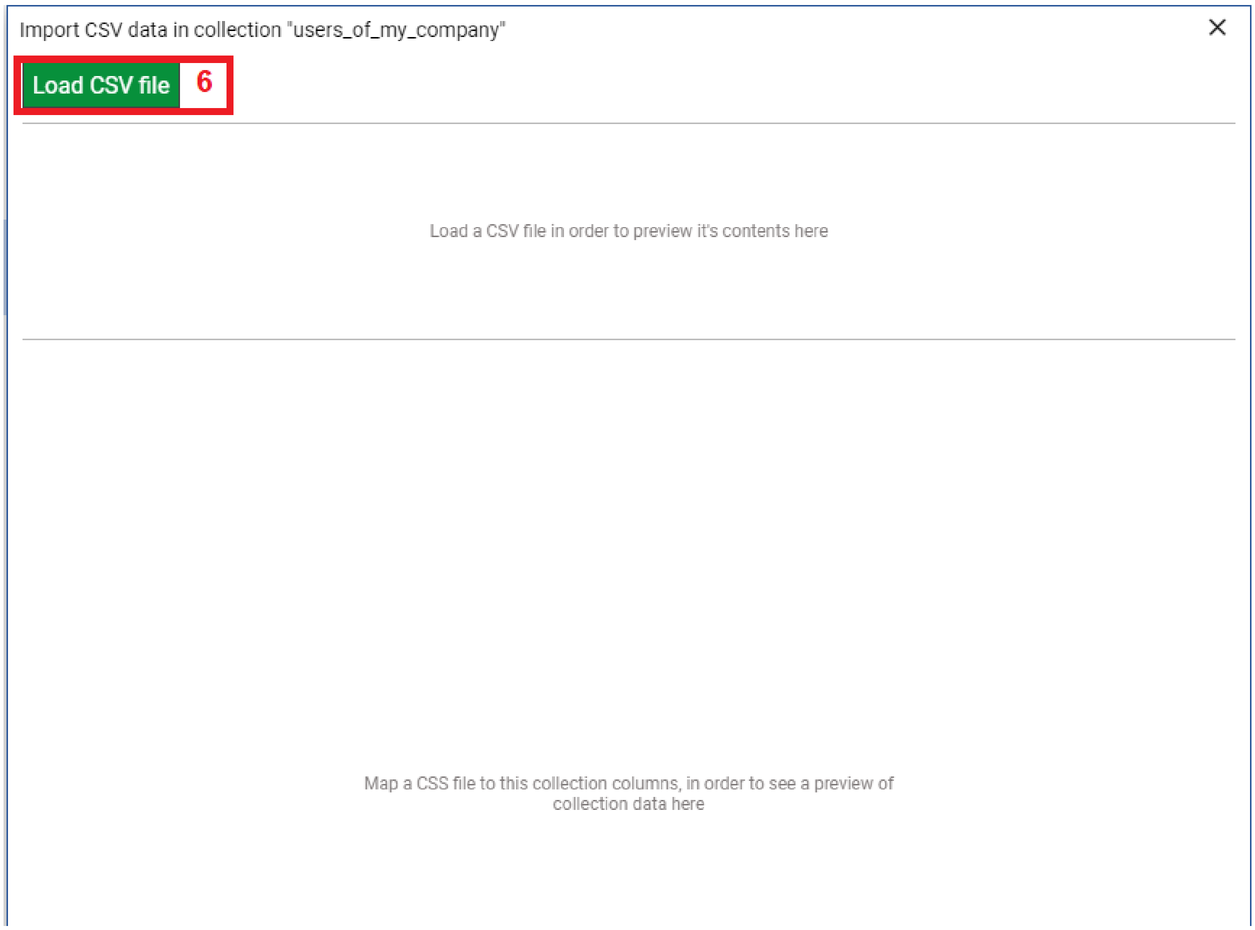
The structure of our BigData collections used for this tutorial is:

Field name	Field Type
email	String
holidays_left	Unsigned integer

1. Click "Open" from the main menu
2. Click section "MY COLLECTIONS"

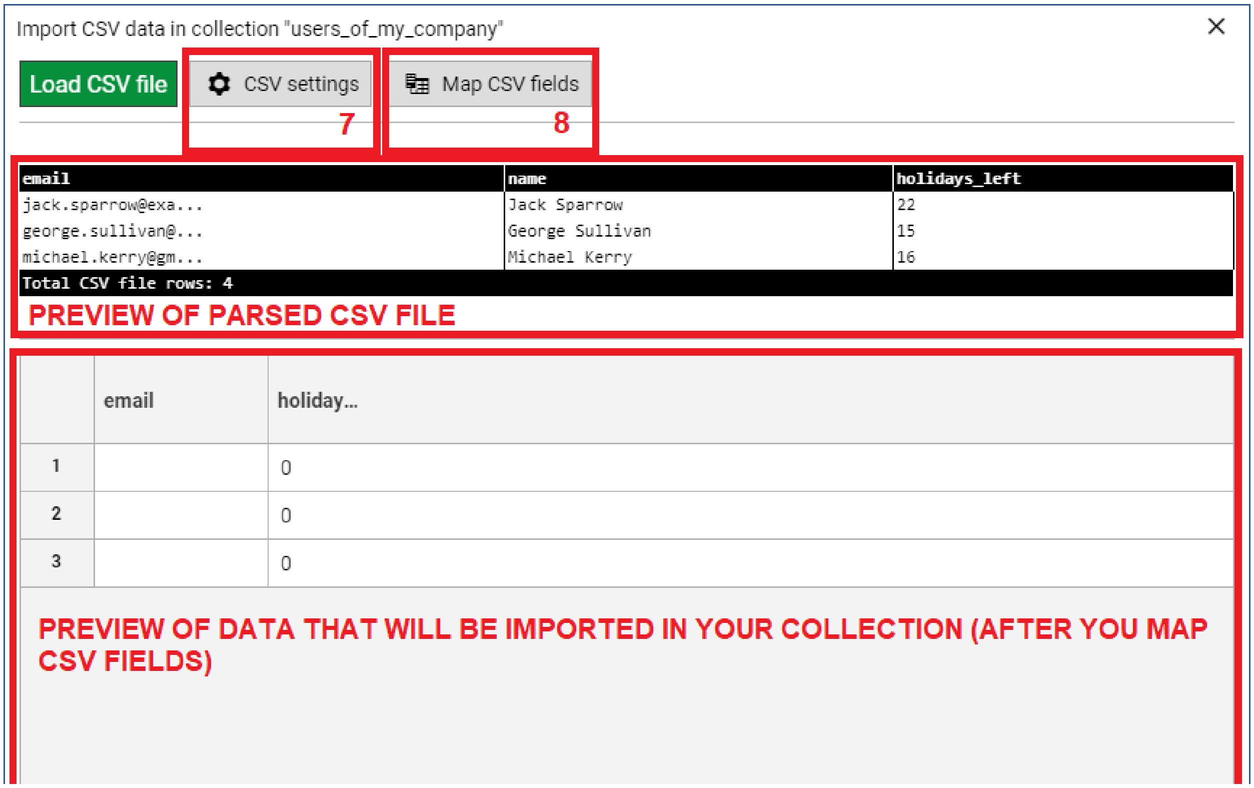
3. Click on “more options” button () corresponding to collection where you want to import data
4. Click on “Import data from” menu option
5. Click on “CSV file” menu option

A window appears. Initially, the window contains only one button.

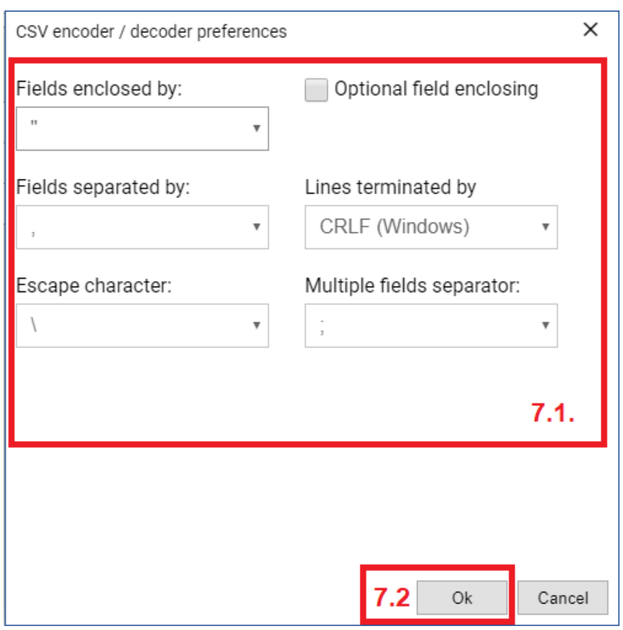


6. Click on button “Load CSV file” and select your CSV file from disk.

After the CSV file is loaded, inside the import CSV window some additional items appear:



7. **Optional step**: If you don't see in the preview of parsed CSV file what you are expecting, click on **CSV settings** button:



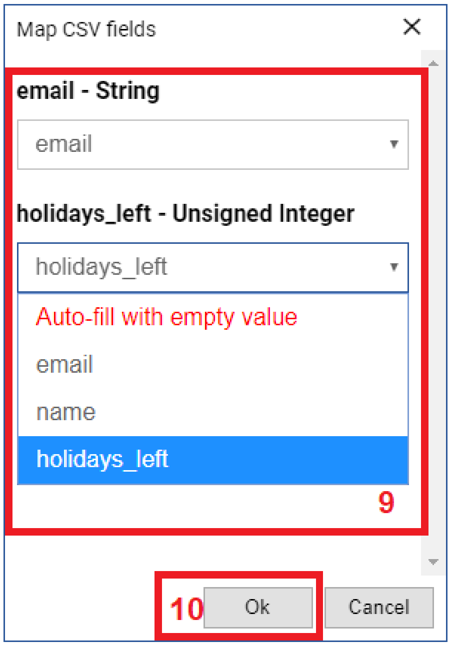
7.1. Edit csv decoder preferences

7.2. **Click Ok** button

7.3. If necessary, repeat step 7 until your CSV file looks good in preview of parsed csv file, then proceed to step 8.

8. **Click** on **Map CSV fields** button

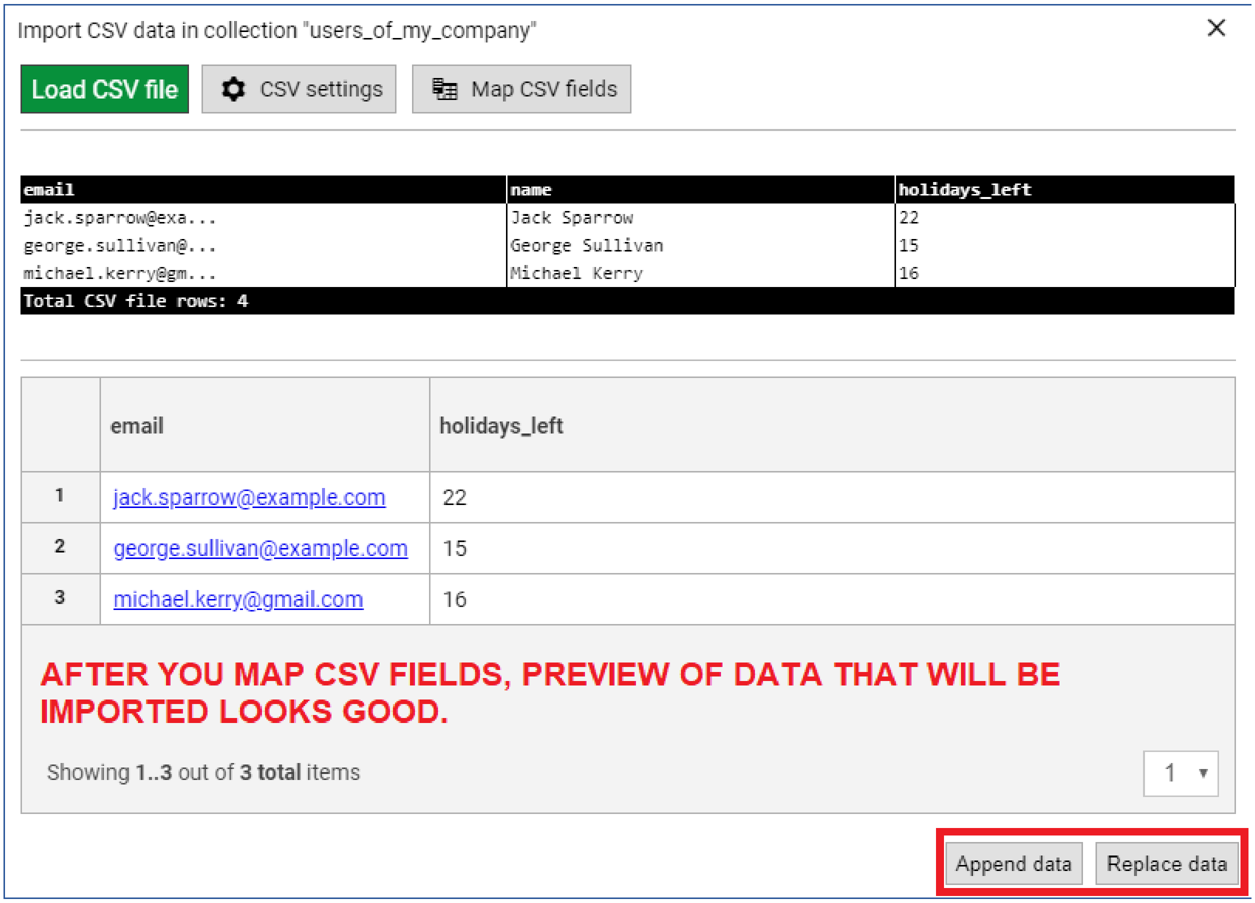
A window will appear, from where you can map the correspondence between the columns of your BigData collection and the columns of your CSV file:



9. **Map each collection field with corresponding csv field**.

   Optionally, you can choose “Auto-fill with empty value” for fields that you want to be imported as empty in your BigData collection.

10. Click **Ok**

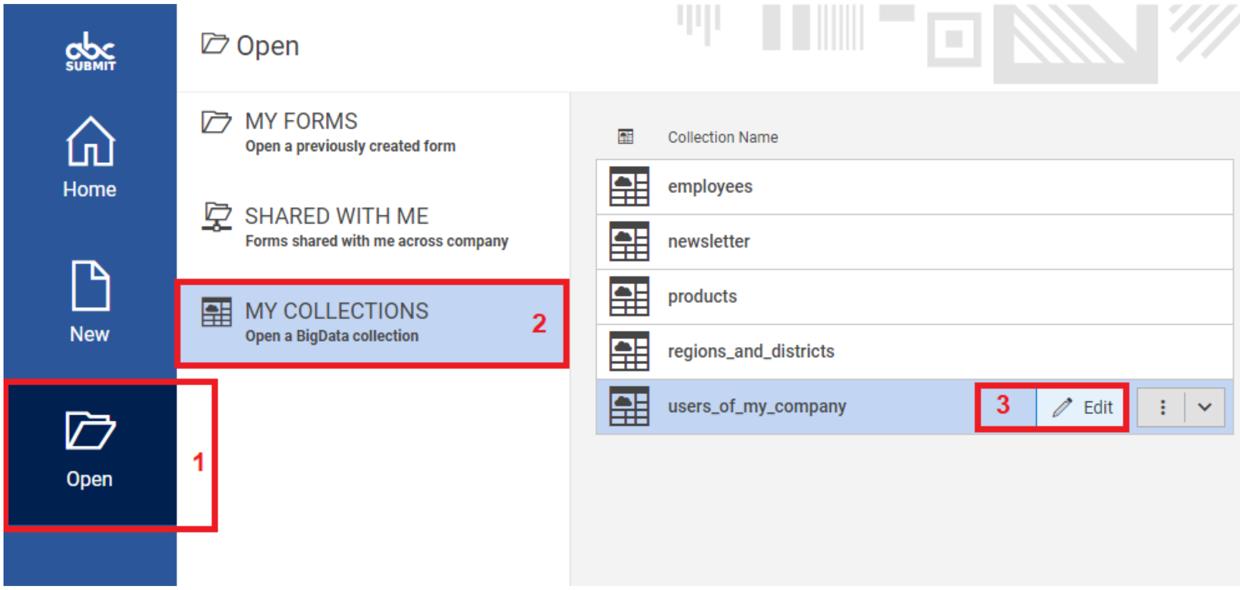


11. Click on button **Append data if you want to keep existing rows into your BigData collection and add csv file as new rows**,

    OR

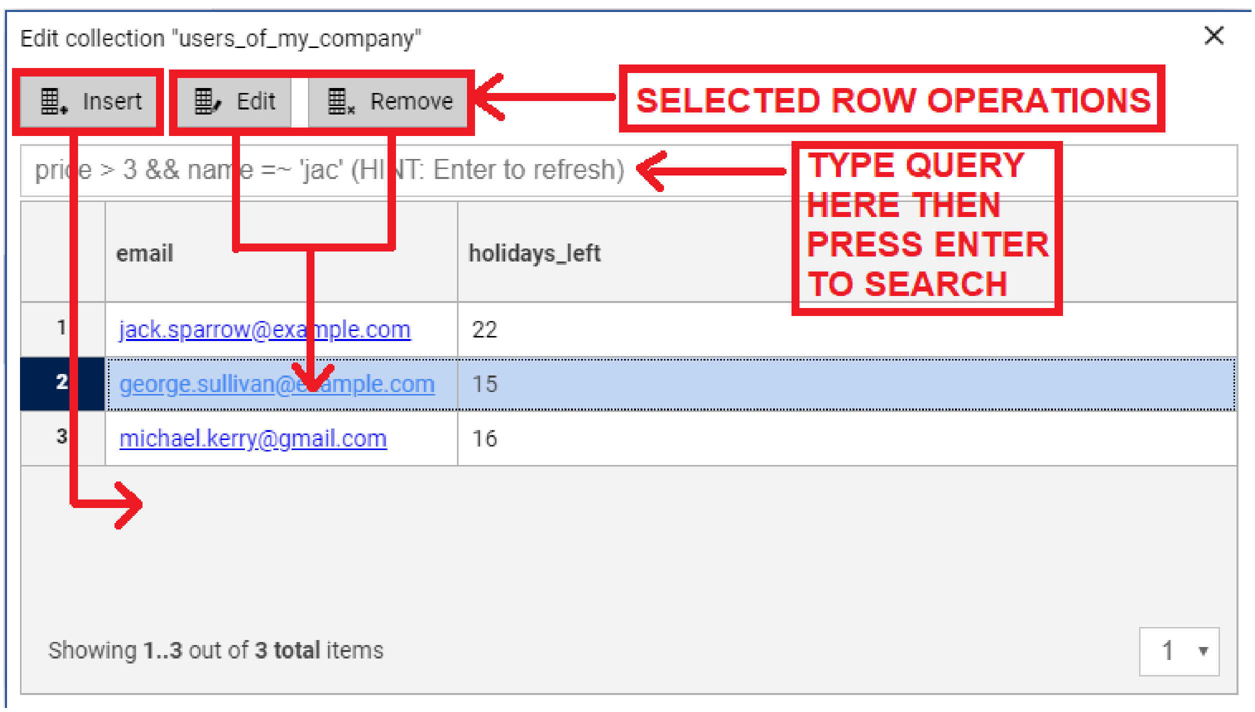
    Click on button **Replace data if you want to replace all your BigData collection contents with the contents of the CSV file**.

7.3. Query and Edit your BigData collection



1. Click “Open” from the main menu
2. Click “MY COLLECTIONS”
3. Click on button “Edit” corresponding to collection you wish to query / edit

A new window will appear from where you can edit or query your collection data:



[FAQ] *What filters can I use to query the collection?*

In the query input from the window where you edit your BigData collection, you can write powerful filter(s) which will help you to search and display only specific data from your collection.

Filtering data can be made using a kind of SQL expression. Here are **some examples**:

In order to search...	I have to write in the search query:
Find all rows where **email** address **starts with** "**john**"	email **=~** "john"
Find all rows where **email** address **ends with** "**google**"	email **~=** "google"
Find all rows where **email** address **contains** "**doe**"	email **~** "doe"
Find all rows where **holidays_left** = **22**	holidays_left **==** 22
Find all rows where **holidays_left** > **22**	holidays_left **>** 22
Find all rows where **holidays_left** < **22**	holidays_left **<** 22
Find all rows where **enabled** is **true**	enabled **==** true
Find all rows where **enabled** **is unset**	enabled **==** null
Find all rows where **email** address **starts with** "**john**" **AND holidays_left** > **10**	email **=~** "john" **&&** holidays_left **>** 10
Find all rows where **email** address **starts with** "**john**" **OR holidays_left** > **10**	email **=~** "john" **||** holidays_left **>** 10
Find all rows where **holidays_left** is in set: **22**, **15**, **24**	**IN**(holidays_left, 22, 15, 24)

Supported query operators:

For query operator...	Use:	Comment
Equals	**==**	**Case sensitive string is performed** (lower and caps letters are treated differently)
Not equal	**!=**	
Greater than	**>**	
Greater or equal than	**>=**	
Lower than	**<**	
Lower or equal than	**<=**	
Starts with	**=~**	
Ends with	**~=**	
Contains	**~**	
Logical AND	**&&**	
Logical OR	**||**	
In	**IN**(<**field_name**>, <**val**$_1$>, <**val**$_2$>, ..., <**val**$_n$>)	Implementation of SQL `IN` equivalent

[TIP]: You can also use rounded parenthesis, in order to override operator importance

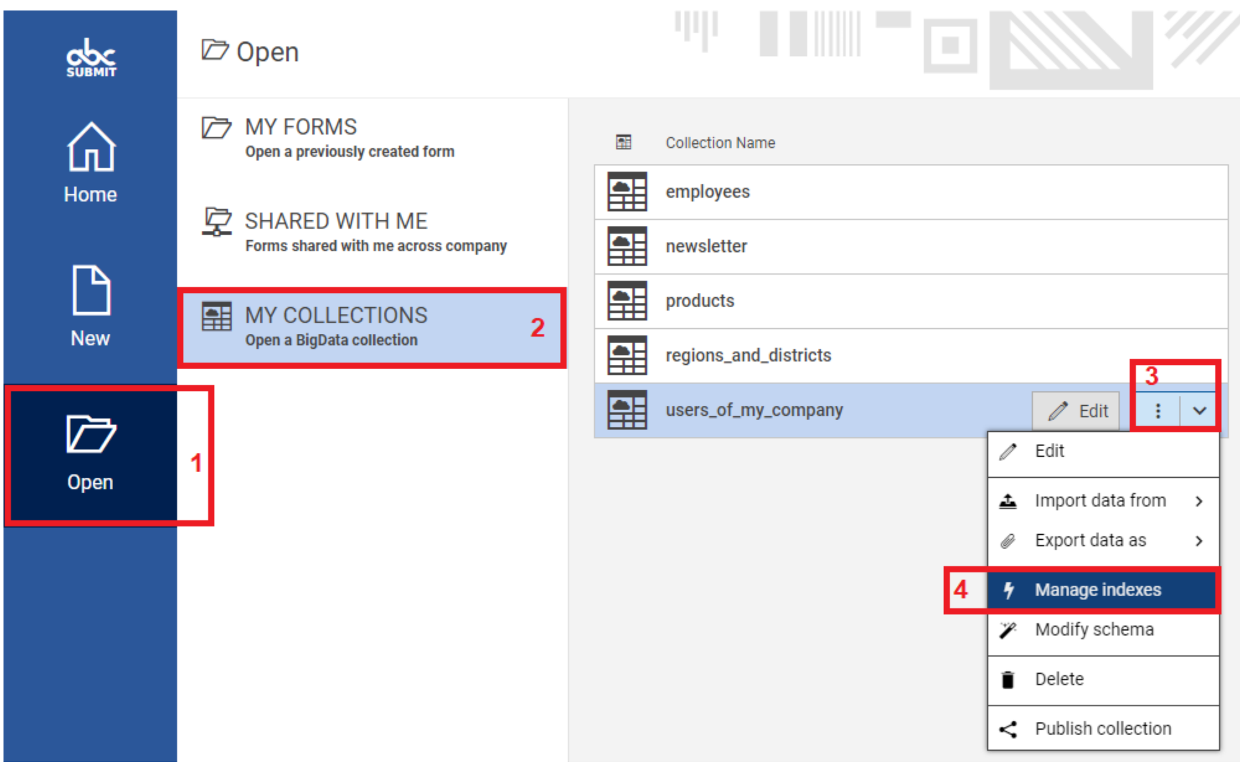
7.4. Add or edit indexes to your collection

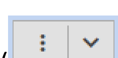
You may reach to a point in time when your collection grows too big and performed queries (via rest api, BigData row viewer, BigData Dropdown, Workflows BigData Update node, BigData integration, Code field, or even manual queries) are too slow or not working at all because of too high server load generated by the search process inside your collection.

In order to avoid such limitations, it is recommended to add indexes to your BigData collection.

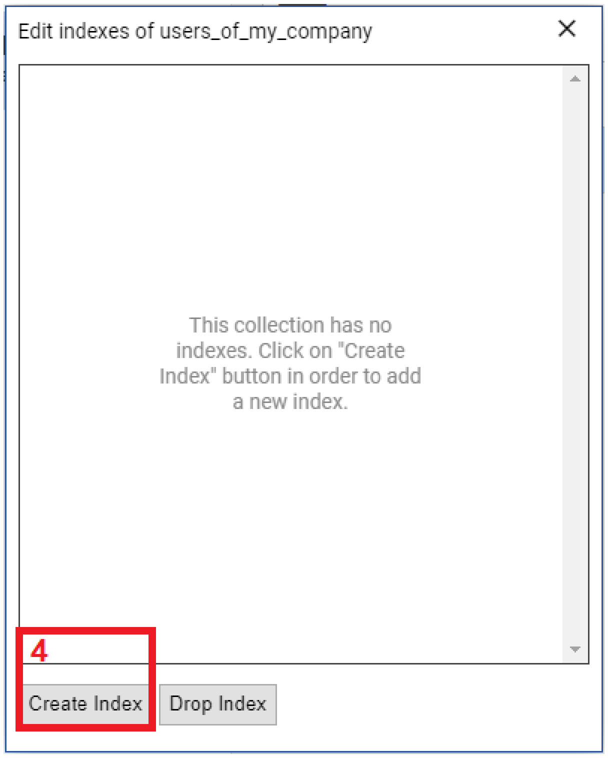
Indexes are of two types: **Unique** and **Non unique**.

To add an index to one of your collections, follow these steps:



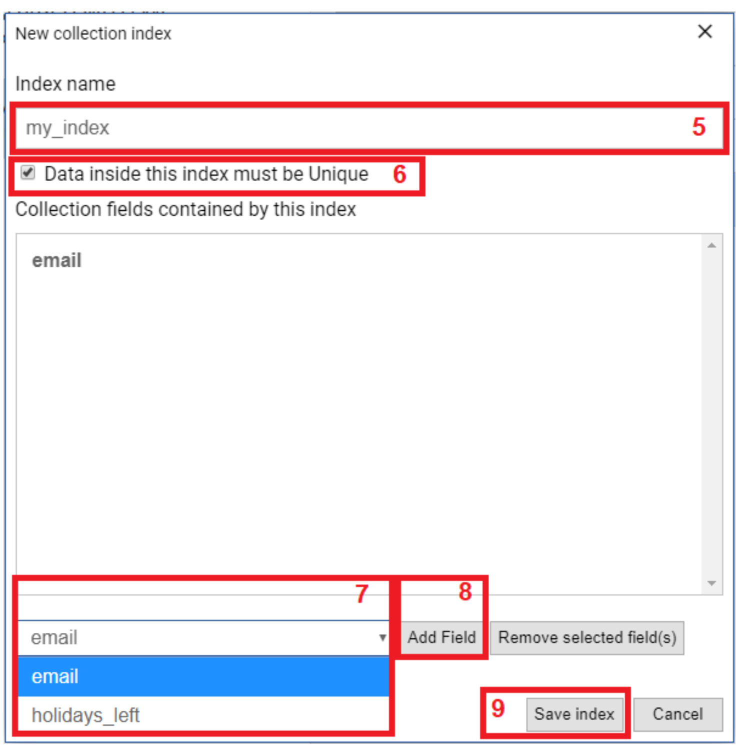
1. Click “**Open**”
2. Click “**MY COLLECTIONS**”
3. Click on “**more actions**” button () on desired collection where you want to add / remove an index

A window containing all the indexes already added in your collection will appear:



4. Click button “**Create Index**”.

Collection index editor window will appear:



5. In field "**Index name**", type the **name of the index**

   [NOTE]: The name of an index must respect the following conventions:
   - Starts with a letter (a..z, A..Z)
   - Contains only letters, numbers, and _ (underline) character
   - Must be unique inside the collection index names, and collection field names

6. **Optional step**: If you want to force the collection to contain unique data for the combination of columns this index contains, check "Data inside this index must be Unique"

For each collection fields you want to add in the index, perform steps 7. and 8.

7. **Select field** of collection which you want **to add in the index**
8. **Click** button "**Add Field**"

   [NOTE]: A collection field can be added only once inside an index

9. **Click** button "**Save index**"

7.5. Update a BigData collection from your form Workflow

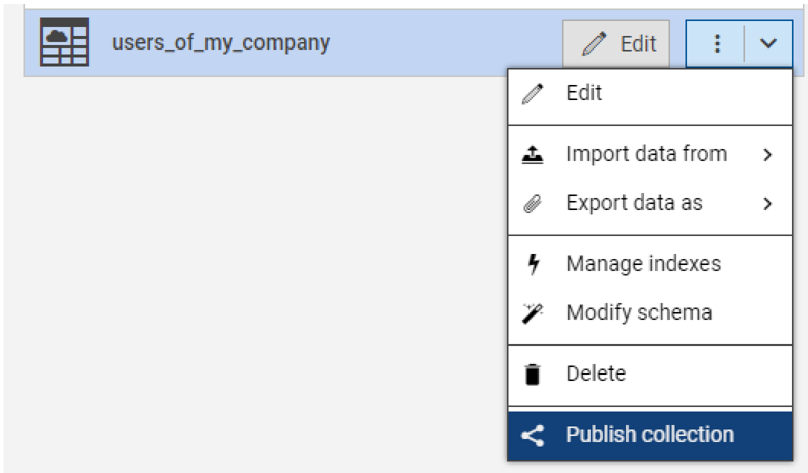
Read about workflows node BigData update.

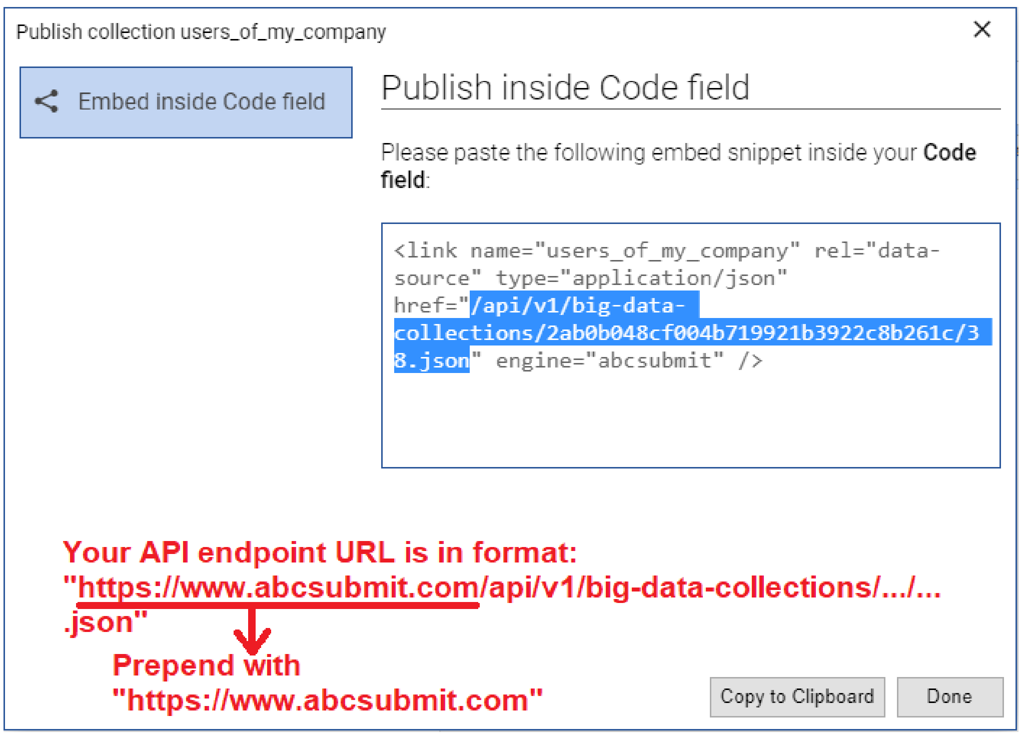
7.6. Update BigData collection using BigData integration

Read about BigData form integration.

*[FAQ] How can I **find out the REST API endpoint where I can fetch / query** my **BigData collection**?*

Use option "Publish Collection":



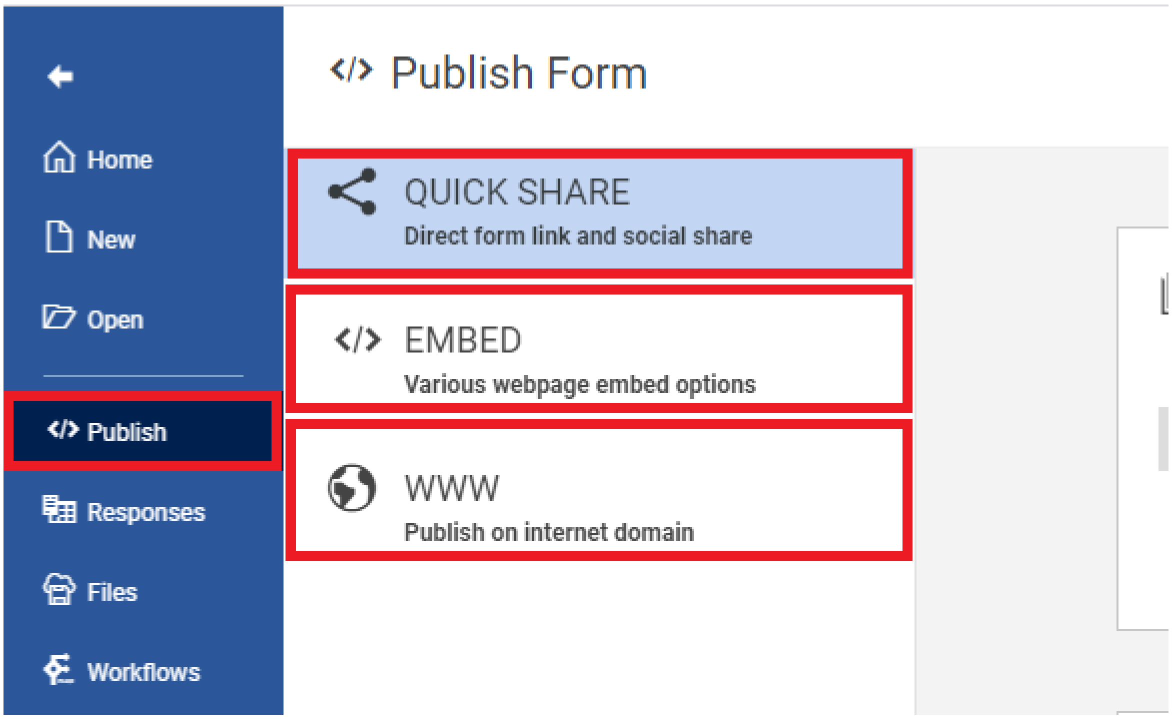


After you find out the REST API endpoint URL address of your collection, you can further read documentation provided by the **Code field editor** / **Edit Code** / **Help** / **BigData collections SDK**, in order to filter, sort, paginate, or fetch specific fields of your collection.

8. Publish or share your form (release your form to public)

After you design your form, you have multiple options related to making your form live.

All these form publishing options are located inside the Publish section of your builder menu:

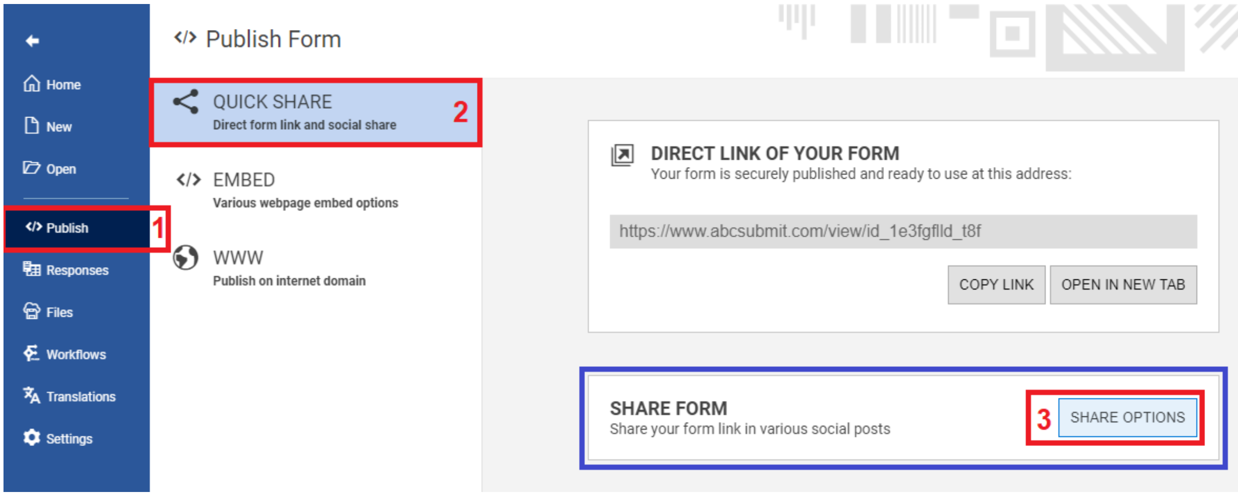


*[FAQ] I want to **send the link of the form to a friend***

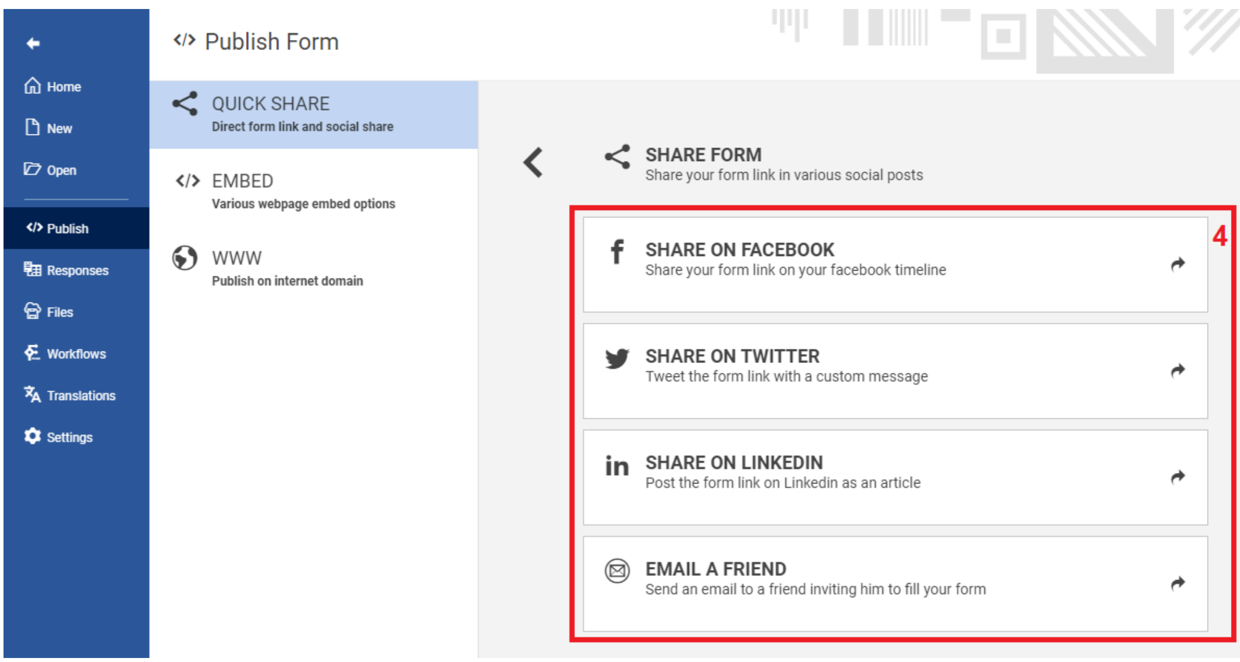
1. **Click** on **Publish**
2. **Click** on **QUICK SHARE**
3. **Inside the "DIRECT LINK OF YOUR FORM" section**, **click** on "**COPY LINK**" **button**

The link is in your clipboard. You can now **paste it** in the message sent to your friend.

*[FAQ] I want to **share my form via a social network** (Facebook, Twitter, LinkedIn)*



1. **Click** on **Publish**
2. **Click** on **QUICK SHARE**
3. **Inside the "SHARE FORM" section**, **click** on button "**SHARE OPTIONS**"

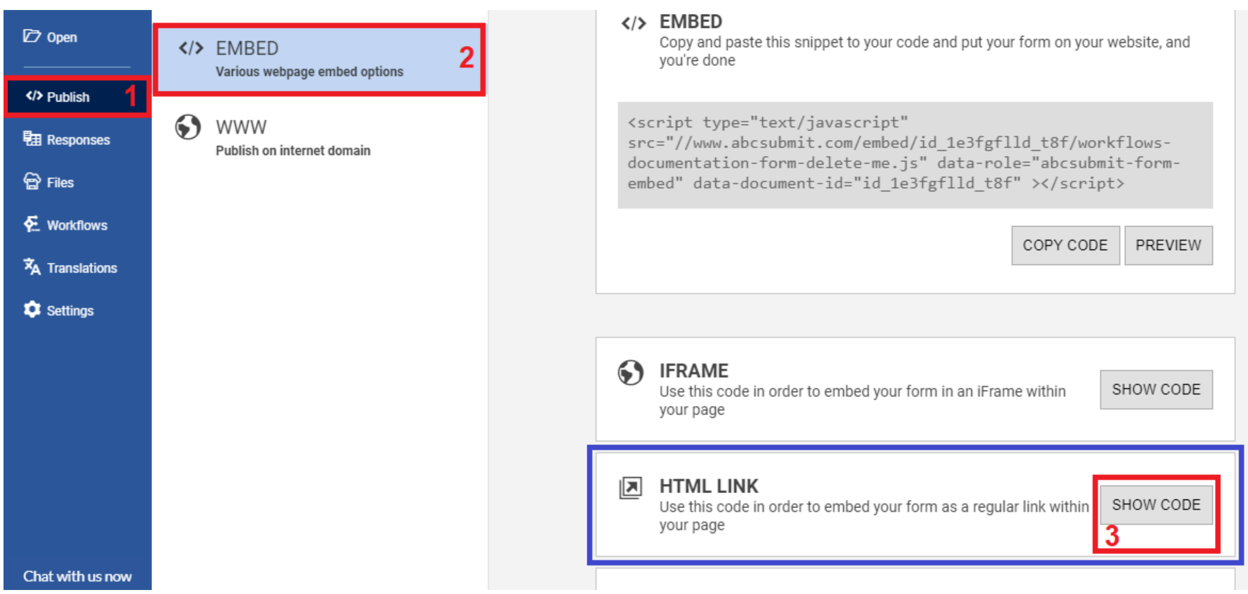


4. **Click** on the **corresponding social network button** where you want to share your form.

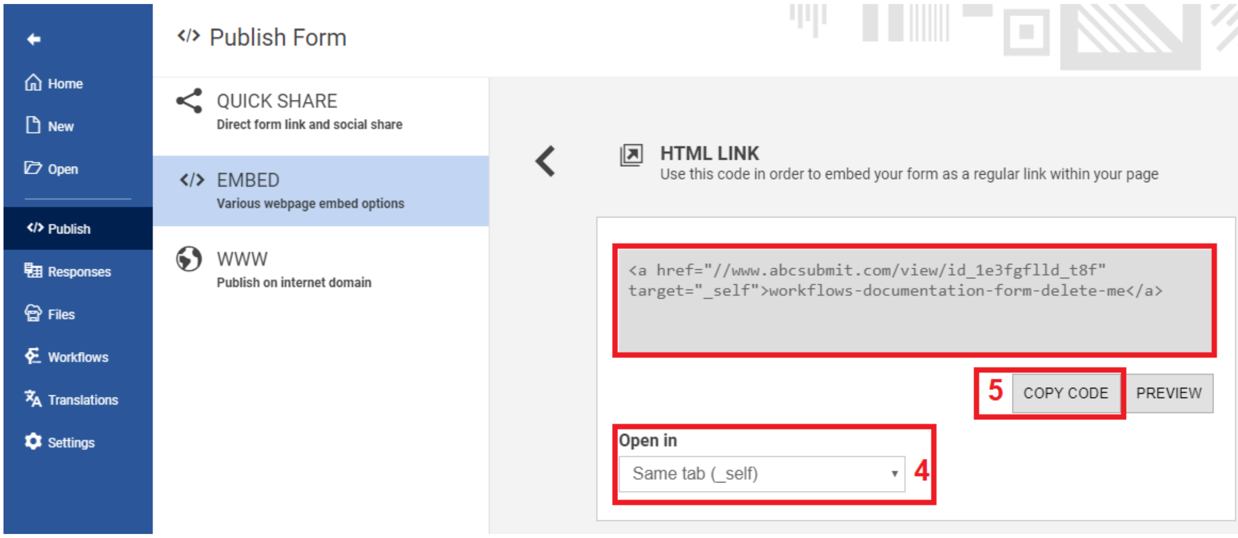
*[FAQ] I want to **embed my form into an existing page of my website***

1. **Click** on **Publish**
2. **Click** on **EMBED**
3. **Inside the "EMBED" section**, **click** on **button** "**COPY CODE**"
4. **Paste the embedded code into the source code of your website**, exactly **at the location where you want your form to be displayed**.

*[FAQ] I want to **insert a HTML link in my website, which points to my form***



1. **Click** on **Publish**
2. **Click** on "**EMBED**"
3. **Inside the "HTML LINK" section**, **click** on the **button** "**SHOW CODE**"

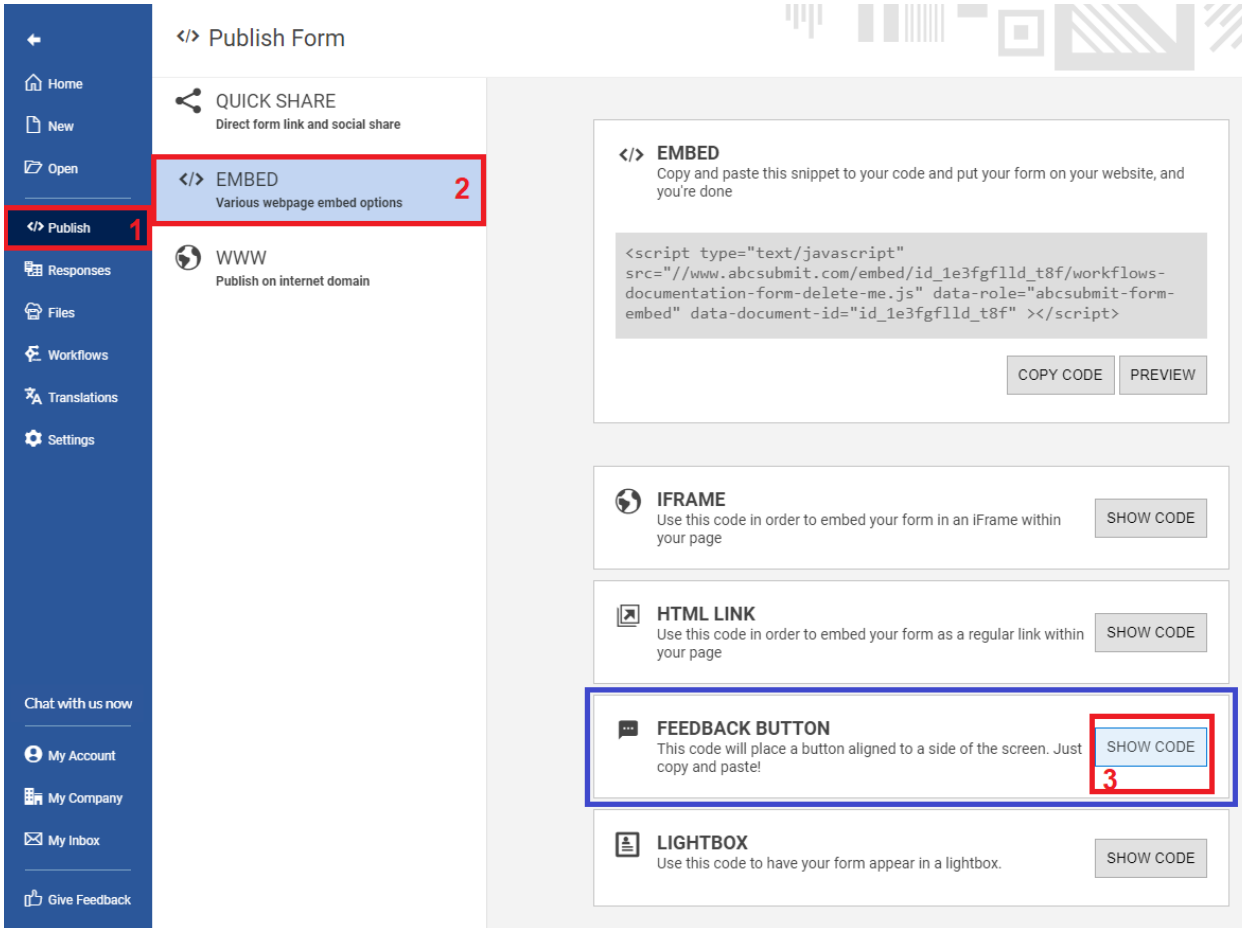


4. **Optional step**: **Customize the tab in which the link will open your form** (by selecting it from setting "**Open in**")

5. **Click** on "**COPY CODE**" button.

6. The HTML link code is now in your clipboard. **Paste the code inside your webpage source code**, **at the location where you want to display the link**.

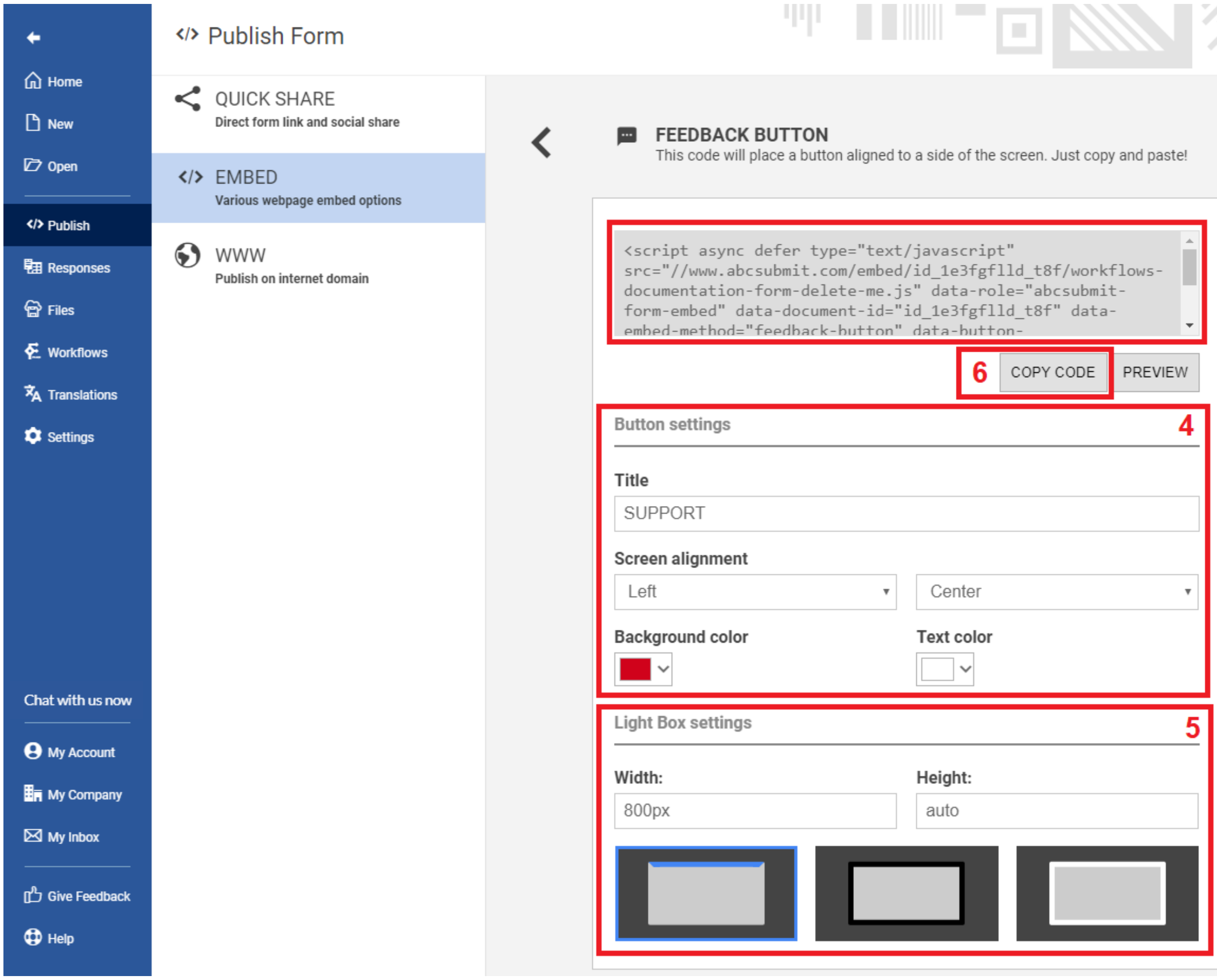
*[FAQ] I want to **add a button on a screen edge of my website, which opens a lightbox with my form** when is clicked*



1. **Click** on “**Publish**”

2. **Click** on “**EMBED**”

3. **Inside the “FEEDBACK BUTTON” section**, **click** on the **button** “**SHOW CODE**”:



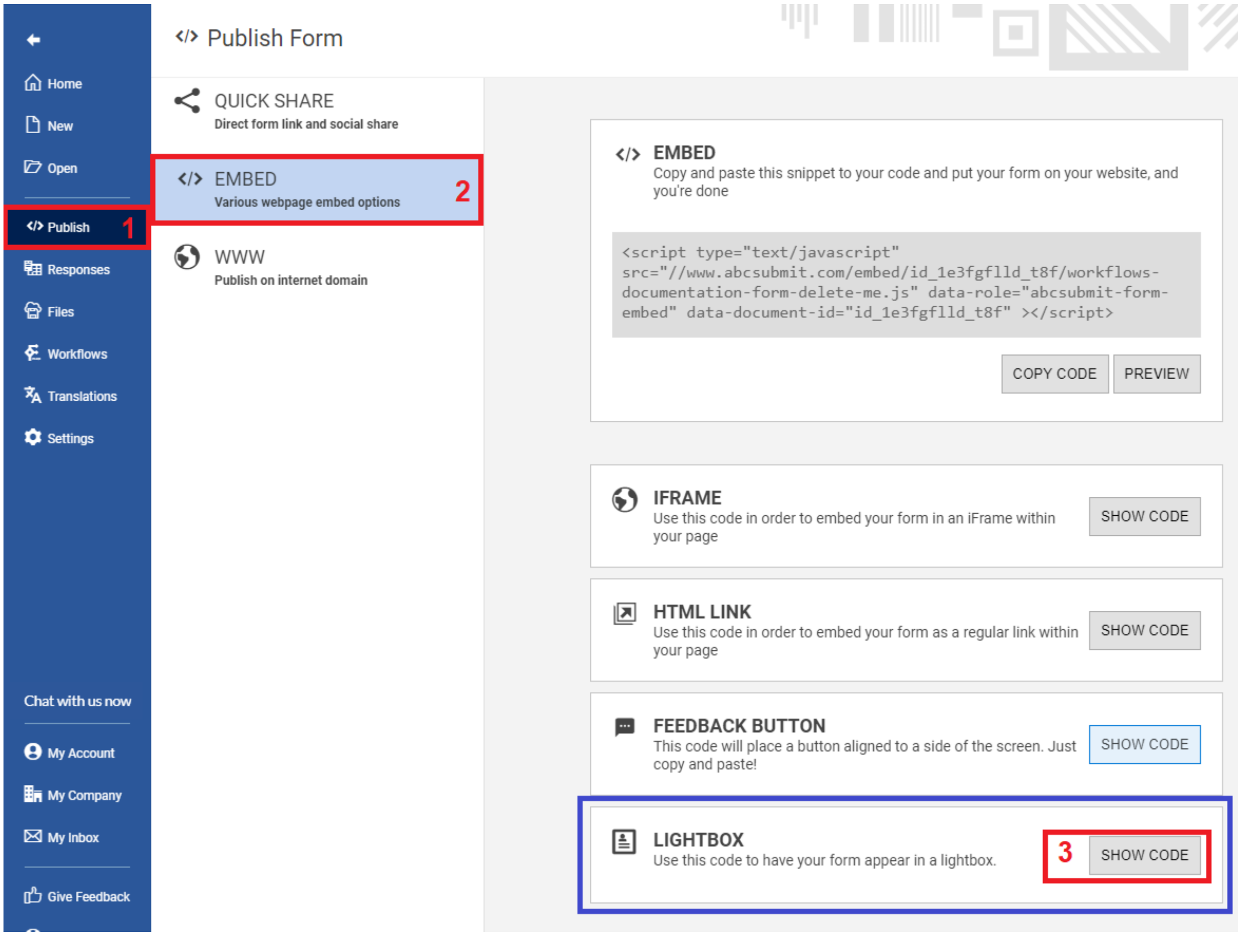
4. **Customize the settings of the button** which will appear on selected edge of your screen

5. **Customize the settings of the lightbox** which will be opened when the button is clicked

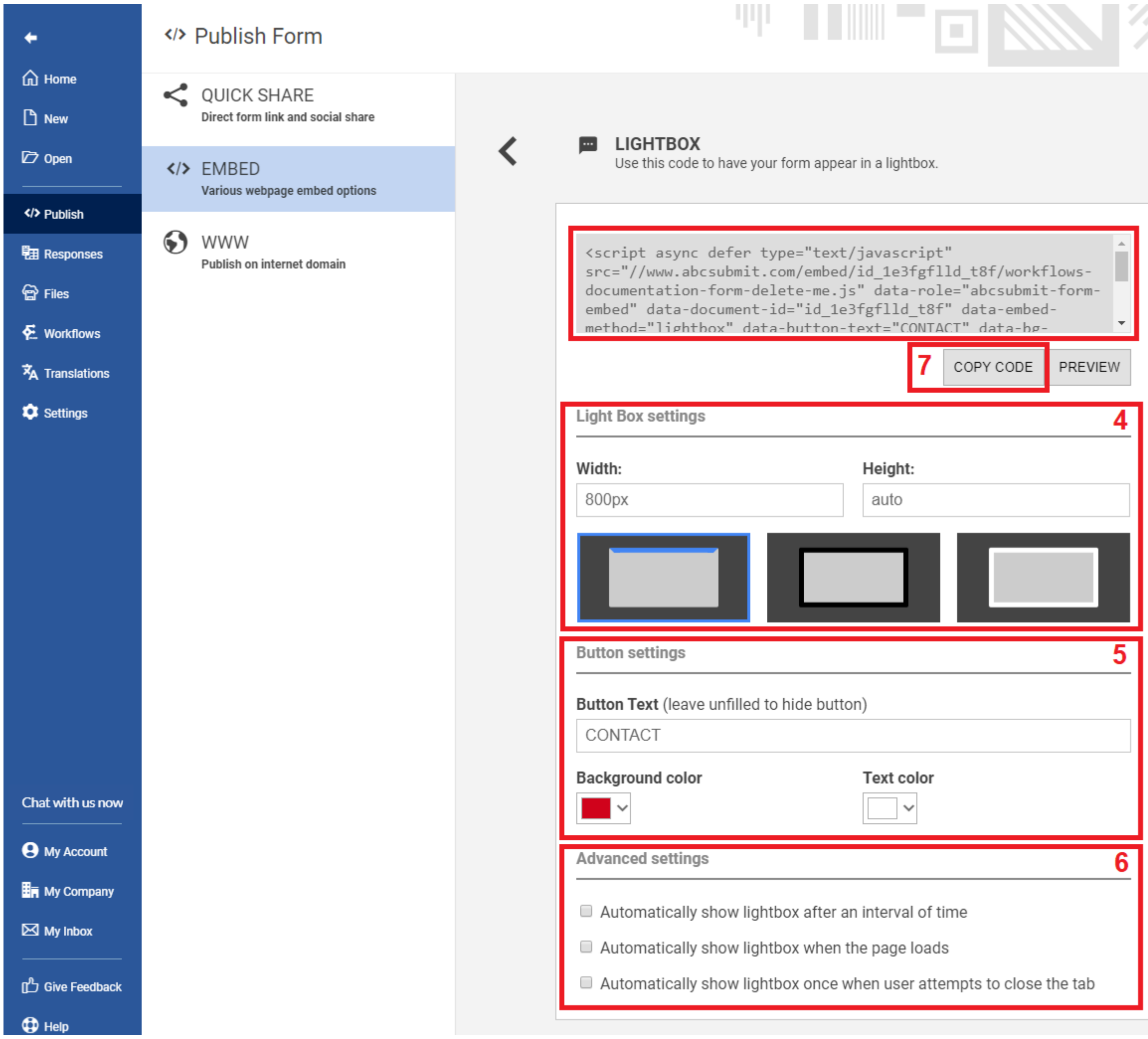
6. **Click** on “**COPY CODE**” button

7. **Paste the code inside the source code of your website page**. A good place where to paste the code would be right **before your close the </body> of the page**, but **this type of embed code can be pasted in any section of your webpage HTML source-code**.

*[FAQ] I want to **display** my **form on a website automatically**, **inside a lightbox**, each time the site is displayed, or after a specific amount of time, or when the user attempts to close my website.*



1. **Click** on **Publish**
2. **Click** on **EMBED**
3. **Inside the section "LIGHTBOX", click** the **button** "**SHOW CODE**":



4. **Customize the settings of the lightbox** (width and appearance)

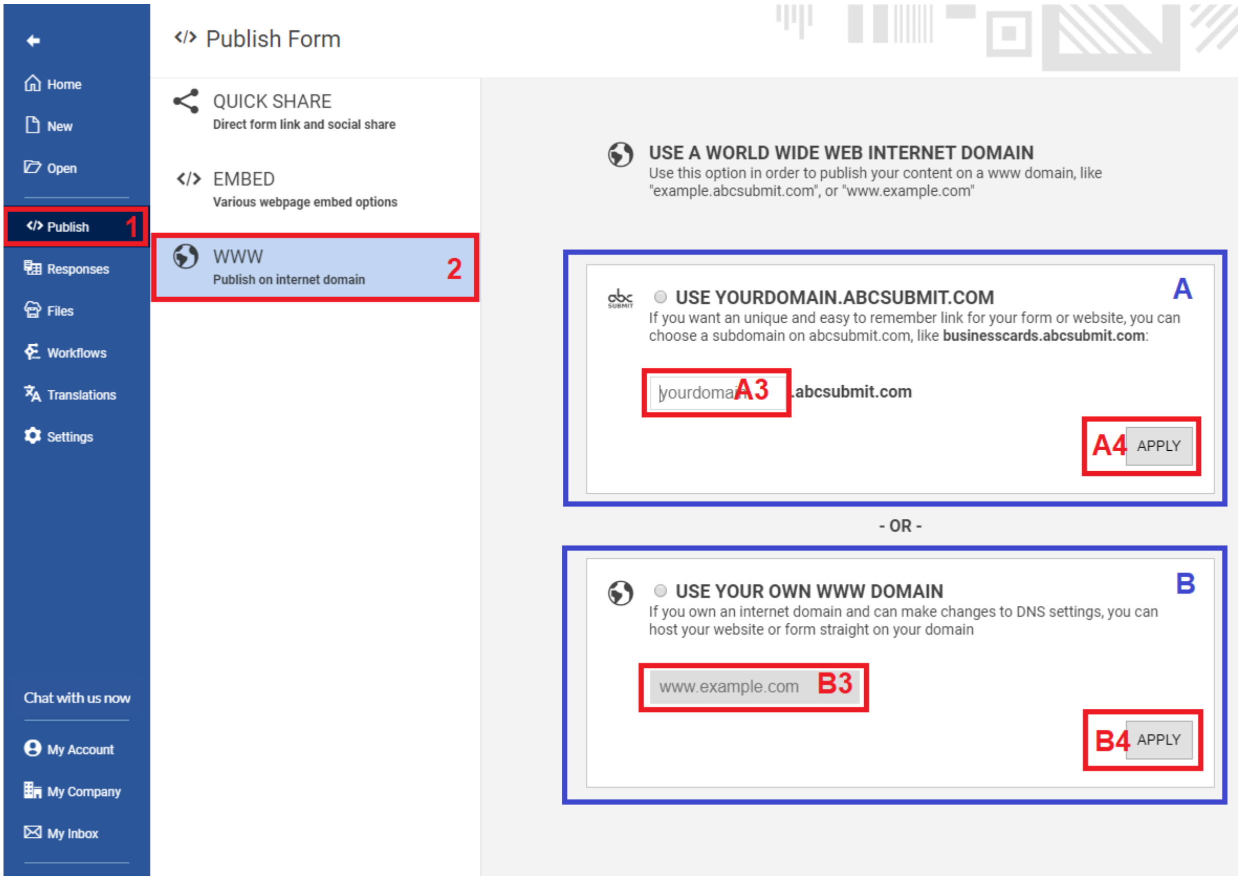
5. **Optionally**, a button is inserted inside your webpage. **If you want to hide the button, clear the text from "Button Text" field**, **otherwise customize the appearance of the button** which will open the lightbox when clicked.

6. **Customize the settings of the lightbox**

7. **Click** on **COPY CODE** button

8. **Paste the copied code into your webpage source code**. **If you want to display a button, the location where you paste the code is important**, otherwise you can paste the embed code anywhere **inside your <body> section** of your webpage.

*[FAQ] I want to **make** my **form accessible from a custom link, like myform.abcsubmit.com or www.myform.com***



1. **Click** on **Publish**
2. **Click** on **WWW**
3. Here **you have two options**:

A) **Use a subdomain hosted on AbcSubmit.com** (like **example**.*abcsubmit.com*)

A.3) **Inside "USE YOURDOMAIN.ABCSUBMIT.COM"** section**, fill the name of the subdomain** (e.g.: example). Do not write the ".abcsubmit.com" part, just the subdomain part.

A.4) **Click "APPLY"**.

B) **Use your own domain** (like **www.example.com**)

In order to host your form under an arbitrary website domain, you will have to **add a DNS record of type A pointing to IP 68.183.108.214** (`whitelabel.abcsubmit.com`).

In case someone else is managing your DNS (website domains), ask your website/network administrator to perform this action for you.

After you complete this step (DNS propagation can take some time, depending on your DNS service provider), **follow steps B.3 and B.4**:

B.3) **Inside "USE YOUR OWN WWW DOMAIN", write the full name of domain which will host your form** (e.g.: www.example.com)

B.4) **Click** button "**APPLY**"

*[FAQ] I'm using **AbcSubmit Wordpress integration**. How do I **publish** my **form in a post of my Wordpress blog**?*

TODO.

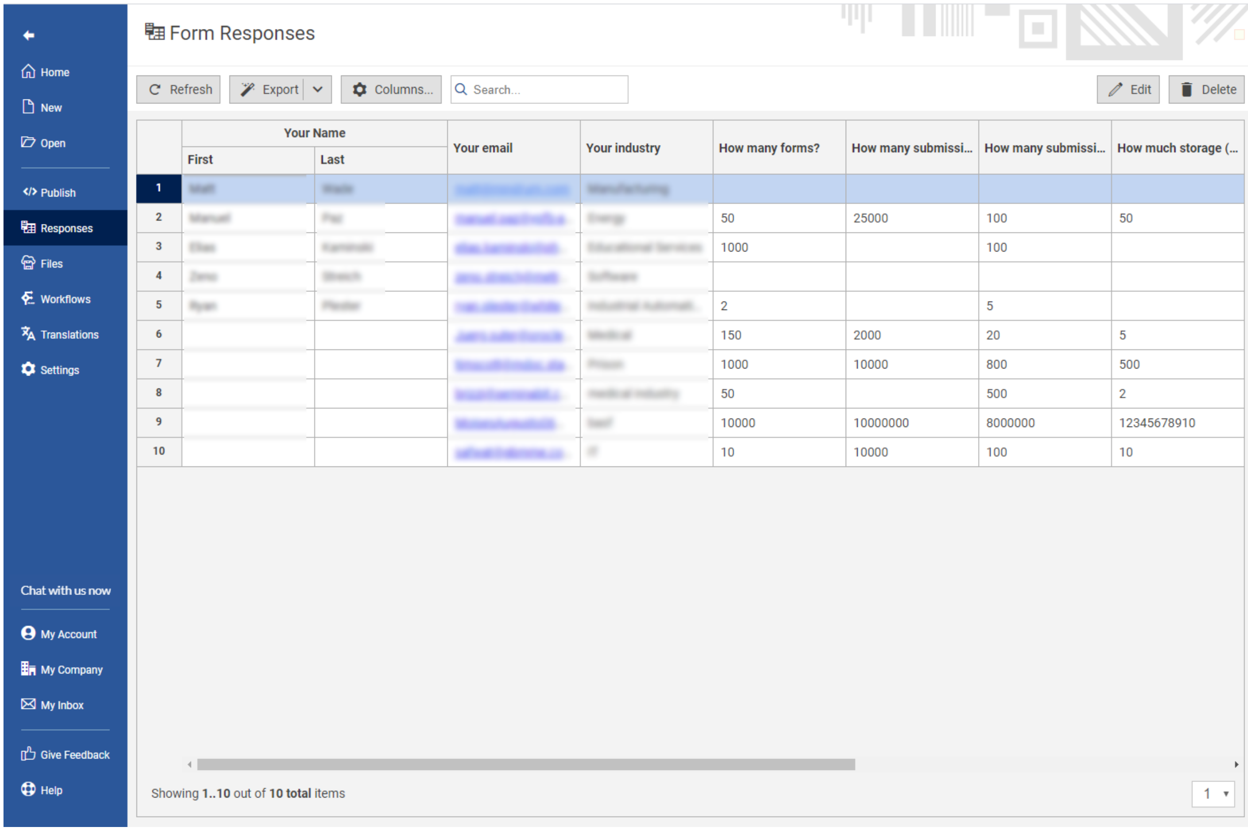
*[FAQ] I'm using **AbcSubmit via Weebly** website builder. How do I **publish** my **form in my Weebly website**?*

If you are using AbcSubmit via Weebly, publishing your form inside Weebly platform is quite simple:

1. **Click** on the **"Publish"** button **from the top of your form**
2. Done

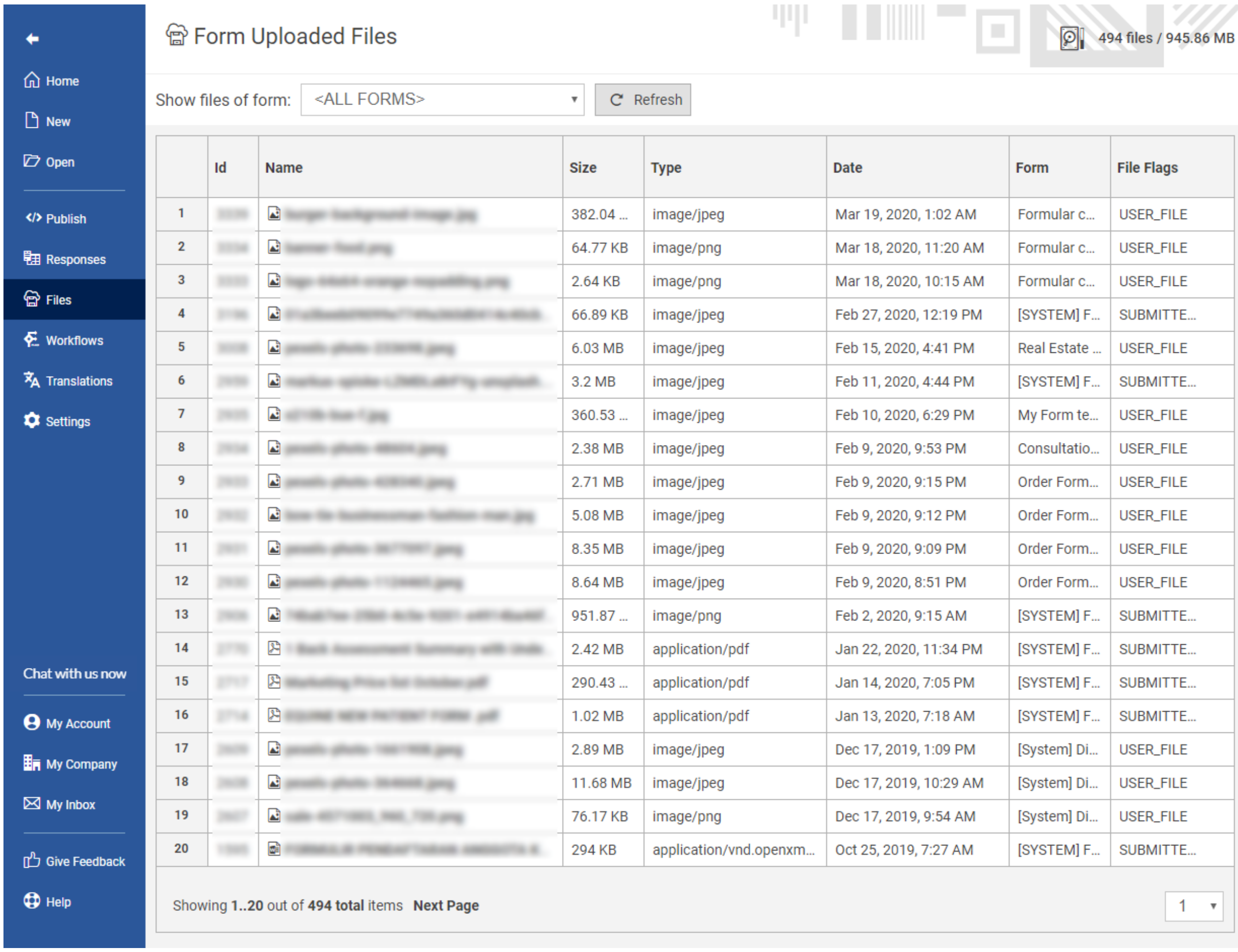
9. Access your form results

Click on “Responses” button from your main menu, in order to show your form results.



10. Access your form uploaded files

Click on “Files” button from your main menu, in order to access your form uploaded files



	Id	Name	Size	Type	Date	Form	File Flags
1	[illegible]	[illegible]	382.04 ...	image/jpeg	Mar 19, 2020, 1:02 AM	Formular c...	USER_FILE
2	[illegible]	[illegible]	64.77 KB	image/png	Mar 18, 2020, 11:20 AM	Formular c...	USER_FILE
3	[illegible]	[illegible]	2.64 KB	image/png	Mar 18, 2020, 10:15 AM	Formular c...	USER_FILE
4	[illegible]	[illegible]	66.89 KB	image/jpeg	Feb 27, 2020, 12:19 PM	[SYSTEM] F...	SUBMITTE...
5	[illegible]	[illegible]	6.03 MB	image/jpeg	Feb 15, 2020, 4:41 PM	Real Estate ...	USER_FILE
6	[illegible]	[illegible]	3.2 MB	image/jpeg	Feb 11, 2020, 4:44 PM	[SYSTEM] F...	SUBMITTE...
7	[illegible]	[illegible]	360.53 ...	image/jpeg	Feb 10, 2020, 6:29 PM	My Form te...	USER_FILE
8	[illegible]	[illegible]	2.38 MB	image/jpeg	Feb 9, 2020, 9:53 PM	Consultatio...	USER_FILE
9	[illegible]	[illegible]	2.71 MB	image/jpeg	Feb 9, 2020, 9:15 PM	Order Form...	USER_FILE
10	[illegible]	[illegible]	5.08 MB	image/jpeg	Feb 9, 2020, 9:12 PM	Order Form...	USER_FILE
11	[illegible]	[illegible]	8.35 MB	image/jpeg	Feb 9, 2020, 9:09 PM	Order Form...	USER_FILE
12	[illegible]	[illegible]	8.64 MB	image/jpeg	Feb 9, 2020, 8:51 PM	Order Form...	USER_FILE
13	[illegible]	[illegible]	951.87 ...	image/png	Feb 2, 2020, 9:15 AM	[SYSTEM] F...	SUBMITTE...
14	[illegible]	[illegible]	2.42 MB	application/pdf	Jan 22, 2020, 11:34 PM	[SYSTEM] F...	SUBMITTE...
15	[illegible]	[illegible]	290.43 ...	application/pdf	Jan 14, 2020, 7:05 PM	[SYSTEM] F...	SUBMITTE...
16	[illegible]	[illegible]	1.02 MB	application/pdf	Jan 13, 2020, 7:18 AM	[SYSTEM] F...	SUBMITTE...
17	[illegible]	[illegible]	2.89 MB	image/jpeg	Dec 17, 2019, 1:09 PM	[System] Di...	USER_FILE
18	[illegible]	[illegible]	11.68 MB	image/jpeg	Dec 17, 2019, 10:29 AM	[System] Di...	USER_FILE
19	[illegible]	[illegible]	76.17 KB	image/png	Dec 17, 2019, 9:54 AM	[System] Di...	USER_FILE
20	[illegible]	[illegible]	294 KB	application/vnd.openxm...	Oct 25, 2019, 7:27 AM	[SYSTEM] F...	SUBMITTE...