



Creating Effective Online Forms....*Fast!*

SGMP Regional Education Conference

Gabrielle K. Gabrielli, CGMP, Ph.D.

13 September 2011

Remembering 9/11....





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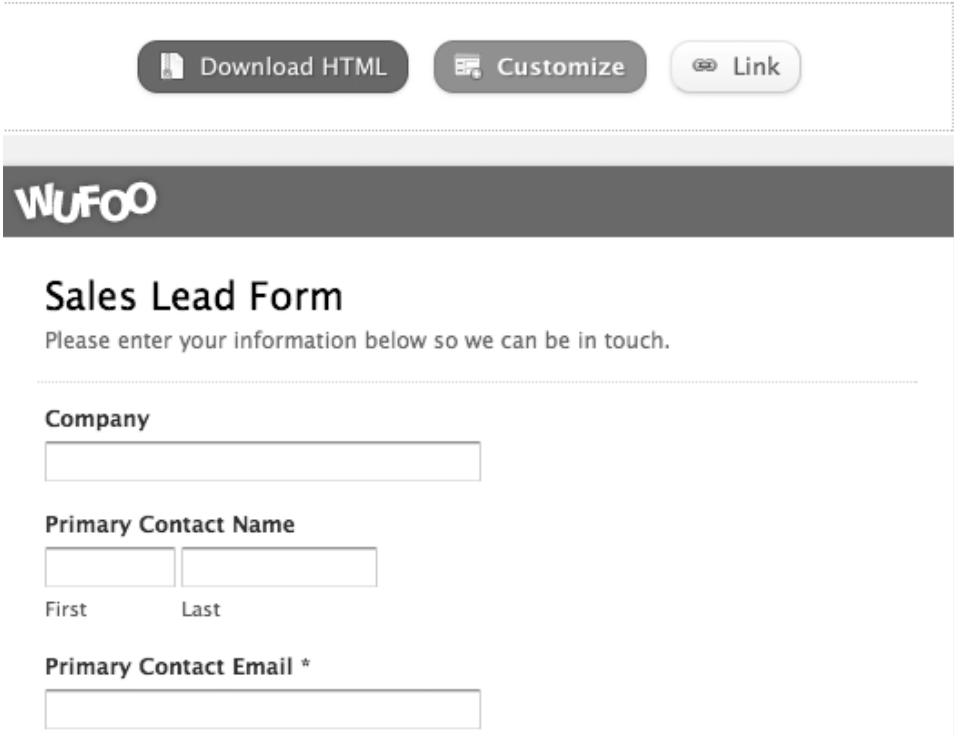
Learning Objectives

By the end of this session, participants should be able to:

- Describe the benefits of using online forms to capture important information
- Identify tools for free or reduced-cost form creation
- Design and develop their own effective online forms
- Explain how best to use all the information collected.

What Kinds of Forms?

- Sales leads
- Invitations
- Registrations
- Tracking
- Online orders
- Inventories
- Customer surveys
- Exercise and diet logs
- College football polls! 😊
- Tests, quizzes, and much more...



The screenshot shows a web form interface for Wufoo. At the top, there are three buttons: 'Download HTML', 'Customize', and 'Link'. Below these is the Wufoo logo. The form title is 'Sales Lead Form', followed by the instruction 'Please enter your information below so we can be in touch.' The form fields include: a 'Company' text box, a 'Primary Contact Name' section with 'First' and 'Last' sub-labels and corresponding text boxes, and a 'Primary Contact Email *' text box.

The Technical Side....

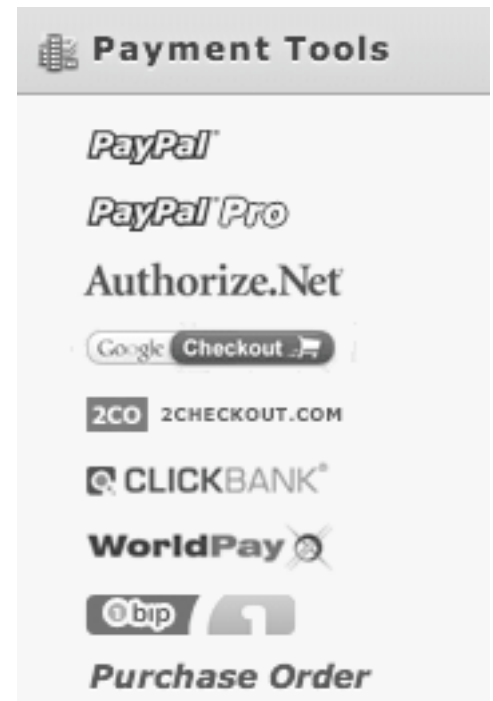
- HTML - *Hypertext Markup Language* - most common language on the Internet; allows for website creation.
- PHP - *Hypertext Preprocessor* - open source general-purpose scripting language; can be embedded into HTML.
- CSS - *Cascading Style Sheets* - styles define how to display HTML elements; can save much time with external CSS.

Benefits of Using Form Generators

- Saves time (does programming for you)
- Saves money
 - No monthly fees (except paid versions)
 - No per registrant fees
 - No maintenance fees
- Makes it convenient for participants
- Improves quality and quantity of feedback
- Enables data mining (analyzing data and summarizing it into useful information that can be used to increase revenue & cut costs)

Challenges

- Customer support lacks in free versions
- Some have submission limits
- Often complex scripting
- Payment options can be limiting
- Can be time consuming, especially when there is an issue



Other Considerations

- Amount and type of data
- Security
- Self-hosting versus hosted
- Offline access to data



```
SendMail
[
  From      : zoho.adminuserid
  To        : input.Email
  Subject   : "37th Air Armament Symposium Registration Confirmation"
  Message   : input.First_Name + " " + input.Last_Name + "<br />\n<br />\nThis serves as your confirmation for successful
registration for the 37th Air Armament Symposium. A total amount of $&nbsp;" + input.GrandTotal + " will be charged to
your account. <br />\n<br />\nAll credit card payments will appear on your statement as MEETING SPOTS charge.<br />\n<br
/>\nThank you!<br />\nJoice Ventry,&nbsp;CMP<br />\nMeeting Spots<br />\njoice@meetingspots.net<br />\n<br />"
]
```

Free or Low Priced Tools

- Zoho <http://creator.zoho.com>
- Wufoo <http://wufoo.com>
- Adobe <https://formcentral.acrobat.com>
- pForm <http://phpform.org>
- JotForm <http://www.jotform.com>
- FormSite <http://formsite.com>
- Instant Form Creator <http://instantformpro.com>

Free, *but* They Want to Sell You...

Appnitro
MachForm

 Try Live Demo

 Features

 Purchase

 Support

 Forums

The Fastest Way to Create Web Forms and Collect Results without writing a single line of code.



- ✓ beautiful forms
- ✓ self hosted
- ✓ anti-spam
- ✓ full PHP source code

Impress your visitors
with the most important thing
a website must have:
(well-designed) forms

What is MachForm?

MachForm is an intuitive, browser based, self-hosted HTML form builder program. Designed as a modern HTML form builder, it makes use of the latest web technologies like AJAX, CSS, and Javascript to provide a fluid browser based experience.

Why MachForm?

Built for ease of use, creating a form is now as **effortless as typing**. No programming experience is needed. Its interface will give anyone the ability to publish online forms or surveys and gather information within minutes.

Our Support

To make it even easier for you, MachForm comes with **free installation service**. At your request, we will setup MachForm on your server within 2 business days.



Get It Now!

A single site license is an affordable **\$39** (price list).

If you're not completely satisfied within 30 days of purchase, we'll refund your money; hassle-free.

 Purchase Now

Pricing - Adobe

Pricing

	Free	Basic	Plus
	<p>Create one form and get up to 50 responses, then immediately view and analyze the results. Subject to the terms of use.</p> <p>Try now</p>	<p>US \$14⁹⁹/ month</p> <p>Create, distribute, and analyze up to 5 forms and surveys in total and get 500 responses per form or survey.</p> <p>Subscribe now</p>	<p>Best value</p> <p>US \$199^{/ year}</p> <p>Create, distribute, and analyze an unlimited number of forms and surveys and get up to 5,000 responses at one time for only \$1.59 more per month.</p> <p>Subscribe now</p>
Questions? Please Email us >			
Maximum number of forms ⁱ	1 Form*	5 Forms*	Unlimited Forms*
Maximum number of responses ⁱ	50 per form	500 per form	5,000 per form
Questions per form ⁱ	Unlimited	Unlimited	Unlimited
Pages per form ⁱ	Unlimited	Unlimited	Unlimited
Data storage ⁱ	Unlimited	Unlimited	Unlimited
Support	Moderated Forum	1-on-1 support	1-on-1 support
Page skip logic ⁱ	-	✓	✓
Redirect after submit ⁱ	-	✓	✓

Pricing - Zoho

Edition	Enterprise	Professional Plus	Professional	Standard	Basic	Your Plan ↓
						Free
Cost Per Month ?	\$175	\$100	\$45	\$25	\$15	\$0
Users ?	50	25	10	5	3	2
Applications ?	Unlimited	Unlimited	Unlimited	Unlimited	Unlimited	3
Records ?	100,000	50,000	20,000	10,000	6,000	1,000
Reports ?	Unlimited	Unlimited	Unlimited	2	2	2
File Attachments ?	7 GB	4 GB	2 GB	1 GB	500 MB	200 MB
Sub Form ?	✓	✓	✓	✓	✓	✗
Scheduler ?	✓	✓	✓	✓	✓	✗
Business Features ? (Customize, Backup)	✓	✓	✓	✓	✗	✗
Payments ?	✓	✓	✗	✗	✗	✗
	Upgrade	Upgrade	Upgrade	Upgrade	Upgrade	Manage

Pricing - WuFoo

AD INFINITUM	CARPE DIEM	BONA FIDE	AD HOC	GRATIS
\$199.95 per Month	\$69.95 per Month	\$29.95 per Month	\$14.95 per Month	FREE!
 Upgrade	 Upgrade	 Upgrade	 Upgrade	Your Plan!
60 Users Unlimited Forms Unlimited Reports <u>Maximum Fields *</u> 100,000 Entries / Month † 10GB Storage SSL Encryption Payment Integration	20 Users Unlimited Forms Unlimited Reports <u>Maximum Fields *</u> 15,000 Entries / Month † 3GB Storage SSL Encryption Payment Integration	5 Users Unlimited Forms Unlimited Reports <u>Maximum Fields *</u> 3,000 Entries / Month † 1GB Storage SSL Encryption Payment Integration	1 User 10 Forms 20 Reports <u>Maximum Fields *</u> 500 Entries / Month † 250MB Storage	1 User 3 Forms 3 Reports 10 Fields 100 Entries / Month

Create Your Own Forms

Zoho Creator **sgmpfl**

Forms ▾ Views ▾ Reports Schedules Script Share Settings ▾ Access

BASIC FIELDS

<input type="text"/> Single Line	<input type="text"/> Multi Line
<input type="email"/> Email	<input type="text"/> Rich Text
<input type="image"/> Image	<input type="text"/> Url
123 Number	.01 Decimal
% Percent	\$ Currency
<input type="text"/> Dropdown	<input type="radio"/> Radio
<input checked="" type="checkbox"/> Checkbox	<input type="text"/> Multi Select
<input type="text"/> Date	<input type="text"/> Date - Time
<input checked="" type="checkbox"/> Decision box	<input type="text"/> Add Notes

ADVANCED FIELDS

<input type="text"/> Formula	<input type="text"/> File upload
<input type="text"/> Lookup	<input type="text"/> Zoho CRM
<input type="text"/> SubForm	

SGMP October Registration More Actions ▾ Views for this Form

Name (Full Name) *

Email Address *

SGMP Membership #
(Required for Member Prices & CEU Credit)

CGMP? *

☐ Yes

☐ No, but I am interested in becoming a CGMP.

☐ No, and I am not interested in becoming a CGMP.

Organization / Company *

Affiliation *

Payment Method ☐ Credit Card Online (Now) - ONLY an option for Suppliers purchasing \$80 annual meeting pass

(Only Required if Not Free) ☐ Pay at the Door (Later) - Cash or checks accepted

Credit Card Number
(Note: CCs charge will be "Meeting Spots")

Expiration Date
(MM/YYYY)

Zoho Offers Lots

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Welcome gabrieleconsulting

ACCOUNT

Follow Zoho

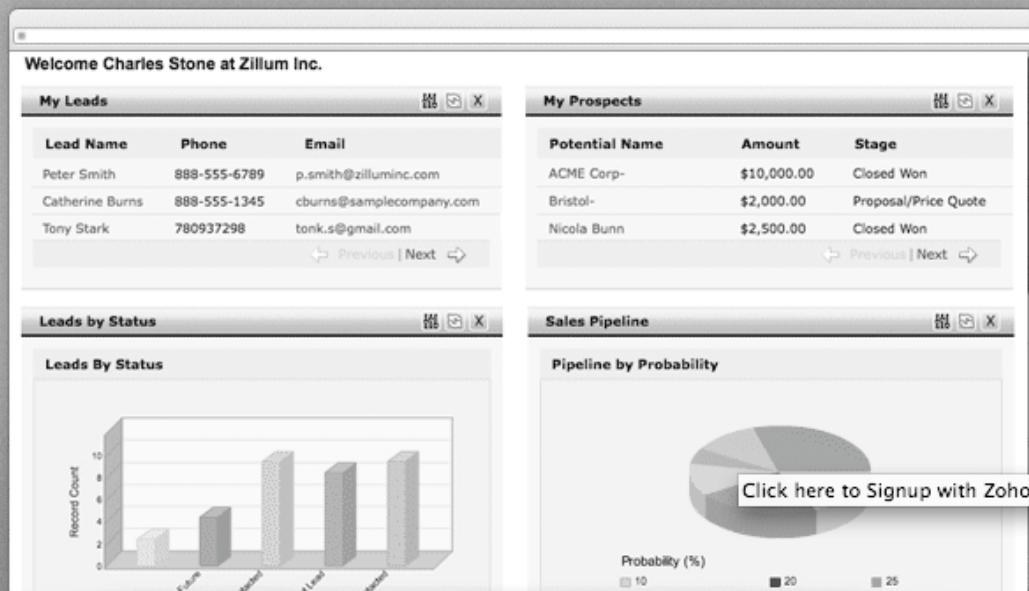
[Home](#)[Collaboration Apps](#)[Business Apps](#)[Productivity Apps](#)[Developers & Partners](#)[About Us](#)

More Than 5 Million Users Work Online With Zoho







ZOHO CRM

Affordable On-demand CRM Software

- ▶ Automate sales process and close more deals
- ▶ Customize Zoho CRM to suit your business needs
- ▶ Contextually integrate Gmail with your Zoho CRM

[Sign Up Now!](#)[Learn More about Zoho CRM](#)[Click here to Signup with Zoho Support](#)[Zoho Projects](#)[Zoho Support](#)[Zoho CRM](#)[Zoho Books](#)

Types of Fields in Zoho

BASIC FIELDS	
 Single Line	 Multi Line
 Email	 Rich Text
 Image	 Url
123 Number	.01 Decimal
% Percent	\$ Currency
 Dropdown	 Radio
 Checkbox	 Multi Select
 Date	 Date - Time
 Decision box	 Add Notes
ADVANCED FIELDS	
 Formula	 File upload
 Lookup	 Zoho CRM
 SubForm	

Paid Version Omits Logo



[INFO »](#) [PROGRAM »](#) [SPONSORS »](#) [BLOG](#) 1

You may print out a pdf version of our registration form and mail it along with payment to:

SGMP SE Region Education Conference
Attn: Registration
P. O. Box 1563
Tallahassee, FL 32302-1563

You can find the PDF version here, or fill out the online form below.

SGMP SE Region Education Conference

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
First Name/ Nickname for Badge	<input type="text"/>
Certification	<input type="text" value="-Select-"/>
Title	<input type="text"/>
Organization *	<input type="text"/>
Mailing Address *	<input type="text"/>
City *	<input type="text"/>
State *	<input type="text" value="-Select-"/>

WuFoo Templates and Themes

Featured Templates

1. Customer Satisfaction Survey

2. Workshop Registration

3. Employment Application

4. Contact Form

5. Wedding Invitation

6. Mailing List

7. Online Petition

8. T-Shirt Order Form

9. Event Planner

10. Bug Tracker

Featured Themes

W L I
F H Modern Office

W L I
F H Firenze

W L I
F H Flower Shop

W L I
F H Japanese Garden

W L I
F H Cubicle Blue

W L I
F H Pistachio

W L I
F H Marie Antoinette

Adobe Template Examples

[illegible]

Customer Satisfaction Survey

[+ New Form](#)

Quickly gather feedback from your customers on your products, services and web sites.



MARKET RESEARCH SURVEY

Please fill in a few responses to complete this satisfaction survey.

Gender:

- ☐ Female
- ☐ Male

Age:

Weekly Income:

- ☐ Under \$15,000
- ☐ \$15,000 - \$19,999
- ☐ \$20,000 - \$24,999
- ☐ \$25,000 - \$29,999
- ☐ \$30,000 - \$34,999
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- ☐ \$690,000 - \$694,999
- ☐ \$695,000 - \$699,999
- ☐ \$700,000 - \$704,999
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- ☐ \$710,000 - \$714,999
- ☐ \$715,000 - \$719,999
- <

Market Research Survey

+ New Form

Get the insights you need to inform your business decisions. Ask questions to determine likelihood to purchase or prioritize product features.

Research Study Screener

Thank you for your interest in participating in our research at [this link](#). This screener will determine whether or not you are eligible to participate in our research. You will be asked to provide the following information:

First Name:

Last Name:

Please Number:

E-Mail:

Are you or any immediate or close family member a current research subject?
☐ Yes ☐ No

Current Job Title:

Name of the company you work for:

Current Employment Status:
☐ Full-time ☐ Part-time
☐ Seasonal / Contracted ☐ Retired
☐ Self-employed

Current Payment: ☐ Full Study ☐ Salary

[Page 1 of 2](#) [Next](#)

Research Study Screener


+ New Form

Find subjects for your study quickly using this template, which includes contact information and employment questions that you can use for screening.

Concept Testing

Local is considering introducing a new product (A). One key feature of this product are (check for feature already exist only) – 1) durable and 2) convenient feature.

Please share your feedback by filling in the questionnaire below.



PRODUCT A

How familiar are you with products from Local?

Scoring:

- ☐ 1) I am not at all familiar
- ☐ 2) I am familiar only
- ☐ 3) I am very familiar

Please provide feedback on the following product attributes.

	Strongly Dislike	Dislike	Neutral	Like	Strongly Like
Affordability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Appearance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Reliability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Performance	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Portability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Size	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Concept Testing

+ New Form

Improve your product research and development. Select this customizable survey template to ask specific or general questions of potential customers.

Join our Mailing List

Would you like to receive mailings from Lund about new products, special offers, and awards? Please enter your e-mail address below to be included on our mailing list.

Your E-mail Address *

Mailing List

+ New Form

Build a mailing list from scratch or add to an existing one. Choose this simple form template to give customers and prospects an easy way to opt in and provide their email address to you directly online.

★ CONTACT US ★

Please enter your information below so we can be in touch.

Company _____

Primary Contact Information

First Name _____

Last Name _____

Street _____

Phone _____

Job Title _____

Address _____

Address Line 2 _____

City _____

State _____

ZIP Code _____

Please call or email the contact you are trying to reach.

How did you hear about us? _____

Questions or comments? _____

Sales Lead Form

+ New Form

Request contact information from sales prospects. Gather prospective inquiries in a structured way that is easy to share with others on your team and act on.



 360 Degree Feedback

360 degree evaluation should be completed by the employee, the employee's manager, the employee's direct reports, and the employee's peers.

Who are you evaluating?

What is your relationship to this person?

Evaluation Date

Next Page 1 of 4 Submit

360 Degree Feedback

+ New Form

Simplify reviews with an online, 360 degree feedback form. This template includes a variety of customizable question types.

Contact Us

Please write your comments, questions, or suggestions to David.
We will respond within six hours.

First Name*

Last Name*

E-mail Address*

Subject*

Questions/
Comments

Contact Us

+ New Form

Customize this simple contact us form template to keep track of issues and respond promptly to customers. Collect contact information in fields, plus details in a message text box.

Customer Incident Form

We appreciate your business and want to hear about your experience being your self.

Customer Name

First Name

Last Name

Customer Address

Address 1

Address 2

City

State

Postal Code

Phone

E-mail

Preferred way to contact you? ☐ E-mail ☐ iPhone ☐ Prefer that

Next Go Backward

Customer Incident

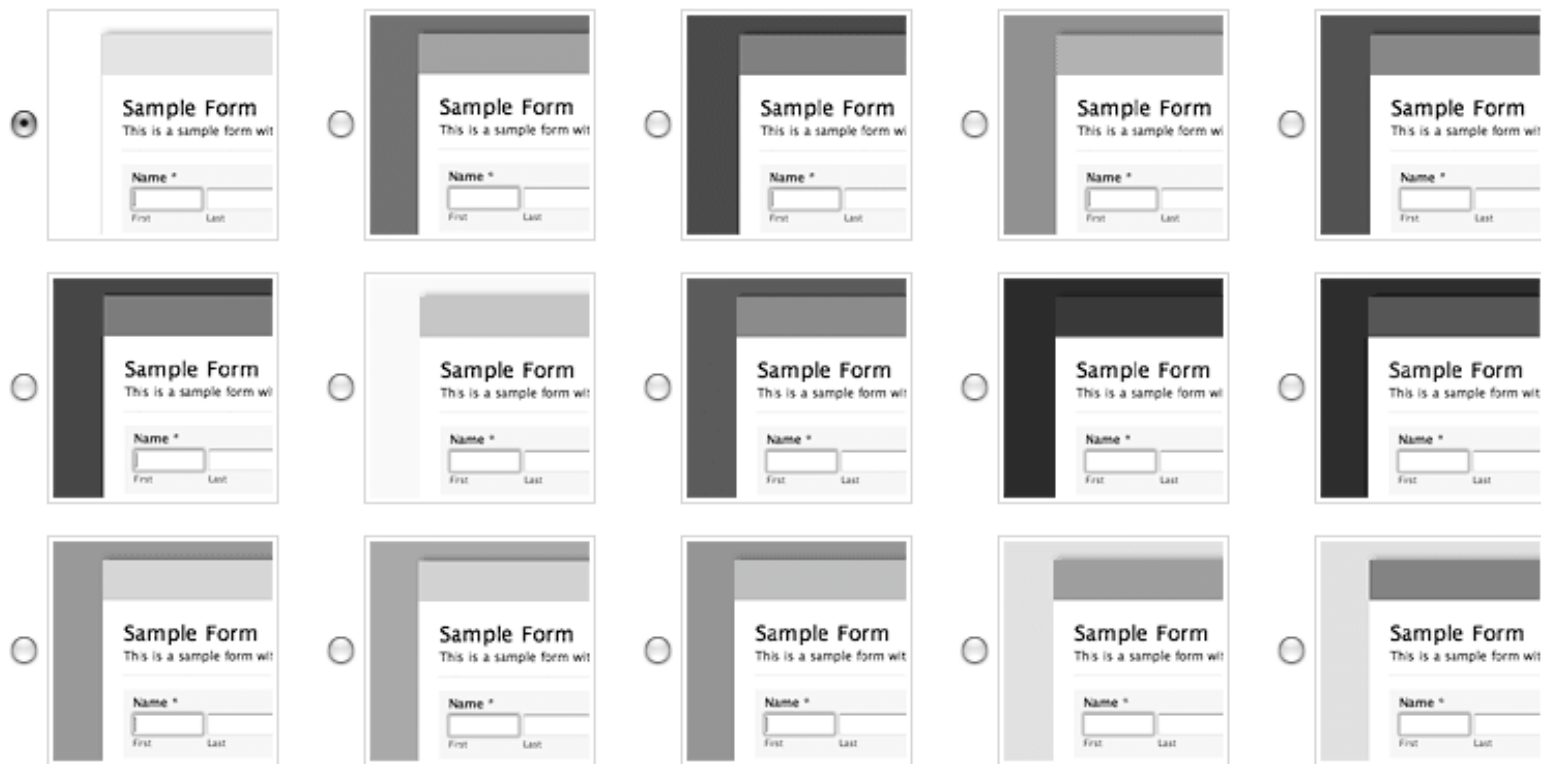
+ New Form

Improve customer care by providing a detailed form for comments and complaints. This template includes contact information, contact method preferences, and incident details fields.

pForm - Self Host - Step 1



Create HTML Form in Seconds. Choose a color to start:



Step 2 in pForm

Appnitro
pForm

STEP 2: Design Your Form


→ SGMP Test Form
This is pretty cool, right?! FREE, too.


Name

Phone
 - -
(###) ### ####

Web Site

Email

 **Save Form**

Add a Field Field Properties  **Form Properties**

Form Title (?)

Description (?)

Step 3 in pForm



Form created!



[Download Form](#) [\(Form Preview\)](#)

-- OR --



[Go Back and Edit My Form](#)

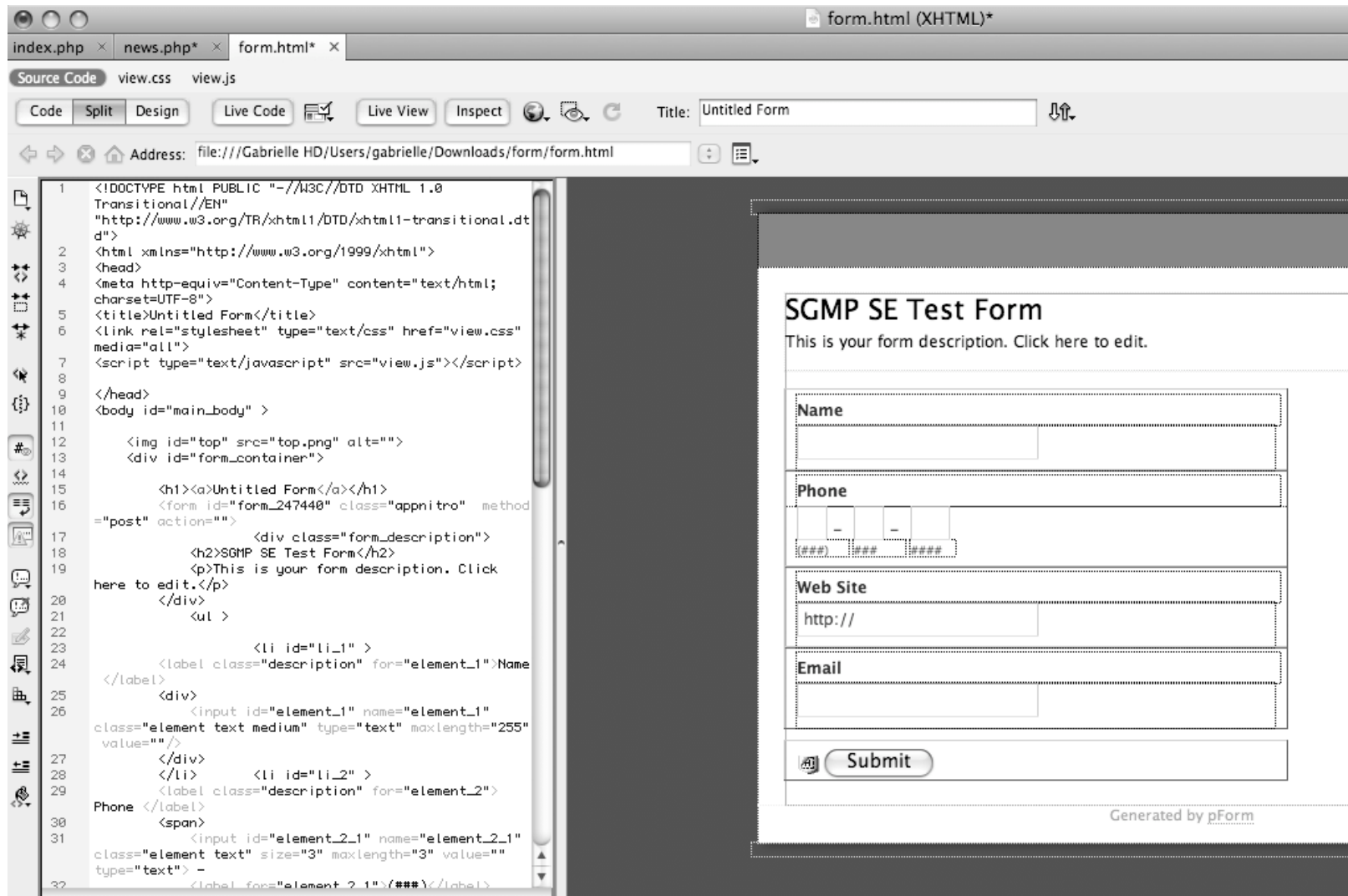
Do you know that you can do more with your form?

- Receive submission and save to database
- Send entries to email
- Send autoresponder email
- Validate inputs, and lot more

All above without writing any single line of code.

Check out our flagship product, [MachForm - PHP Form Builder](#), the superset of pForm.

Access to Code for Self-Hosting



Embedding

- Many of the tools including Zoho and Adobe allow you to host with them and copy the code to embed in your own site.



[INFO »](#) [PROGRAM »](#) [SPONSORS »](#) [BLOG](#)

You may print out a pdf version of our registration form and mail it along with payment to:

SGMP SE Region Education Conference
Attn: Registration
P. O. Box 1563
Tallahassee, FL 32302-1563

You can find the PDF version here, or fill out the online form below.

SGMP SE Region Education Conference

First Name *	<input type="text"/>
Last Name *	<input type="text"/>
First Name/ Nickname for Badge	<input type="text"/>
Certification	<input type="text" value="-Select-"/>

Embed Options

Form Width	700 px	?
Background	<input type="checkbox"/> Include page background colors	?
Header	<input type="checkbox"/> Include form header	

Get Embed Code

```
<script type="text/javascript" src="https://formscentral.acrobat.com/Clients/Current/FormsCentral/htmlClient/scripts/adobe.form.embed.min.js"></script>
<script type="text/javascript">
var fxB_2aoKzYMPTIjqrbeCm9_2aw = new
ADOBEFORMS.EmbedForm
({formId:"xmB*oKzYMPTIjqrbeCm9*w", server:"https://adobeformscentral.com/", width:700, showHeader:false, transparent:true, widthAfterRedirect:-1, heightAfterRedirect:-1});
fxB_2aoKzYMPTIjqrbeCm9_2aw.display();
</script>
```

Copy

Close

Example of Data View

- Exportable data to XLS, CSV, and PDF

Contact View More Actions ▼								
Add Bulk Edit Duplicate Delete Search Filter : ----- All ----- << < 1 - 10 > >> 10 per page Record Count								
<input type="checkbox"/>		First Name	Mobile number	Contact Address	EmailId	About me	Preferred Method of Contact	Community
<input type="checkbox"/>	Edit View	Gabrielle Gabrielli	8503218222	test	gabrielle@gabrielleconsulting.com	Testing	Phone	Testing
<input type="checkbox"/>	Edit View	Gabrielle Gabrielli	850321822	PO Box 12861	gabrielle@gabrielleconsulting.com	test	Email	None- Test
<input type="checkbox"/>	Edit View	Gabrielle Gabrielli	8503218222		gabrielle@gabrielleconsulting.com	Testing the form...no need to reply.	Email	Bull Run
<input type="checkbox"/>	Edit View	Gabrielle Gabrielli	8503218222		gabrielle@gabrielleconsulting.com	testing the system	Email	
<input type="checkbox"/>	Edit View	Neil Ryder	850-656-0006	1504 China Grove Trail	NeilRyder@comcast.net	Communities Info Page		
<input type="checkbox"/>	Edit View	Neil Ryder	850-656-0006	1504 China Grove Trail	NeilRyder@comcast.net	Home Page Info Email link		
<input type="checkbox"/>	Edit View	Neil Ryder	850-656-4663 x116	502-C Capital Circle SE	NeilRyder@comcast.net	Customer Care Page	Phone	
<input type="checkbox"/>	Edit View	Neil Ryder	850-656-0006	1504 China Grove Trail	NeilRyder@comcast.net	What I can Afford	Email	
<input type="checkbox"/>	Edit View	Neil Ryder	850-656-0006	1504 China Grove Trail	NeilRyder@comcast.net	Other Contact Page	Email	
<input type="checkbox"/>	Edit View	Neil Ryder	850-656-0006	1504 China Grove Trail	NeilRyder@comcast.net	Warranty Contact Page	Mail	

Example of Forms View

Home

Personal Apps

Workspace Apps

Shared Apps

Messages

Settings

Usage Limit

Subscription

Personal Apps

Create Application

Applications	Created
<div>Edit</div> NDIA Golf 2011 public	Apr 21, 2011
<div>Edit</div> 37th Air Armament Symposium public <div>Settings</div> <div>Duplicate</div> <div>Share</div>	Apr 07, 2011
<div>Edit</div> AMPUC 2011 public	Feb 05, 2011
<div>Edit</div> Registration public	Dec 07, 2010

Number of applications:4

Example of Scripting

- This function is an example of how to convert text to string in order to add numbers.

```
/*late=0;
for each item in Reception
{
late=((item).subString(((item).length() - 2), (item).length())).toLong();
}*/

MainTotal = 0 ;
for each item in late
{
    MainTotal = (MainTotal + ((item).subString(((item).length() - 2), (item).length())).toLong()) ;
}

TotalLate = MainTotal ;
TotalFees = ifnull(input.TotalFees,0) ;
GrandTotal = (input.TotalFees + input.TotalLate) ;
```

I <3 Doodle

Doodle®

[Log in](#)

Easy scheduling

Free of charge and without registration

Schedule an event

[View example](#)



Lunch?



Lunch!

1

**Create
poll**

2

**Invite
participants**

3

**Confirm
date and time**

I <3 Survey Monkey

- Limited to 10 questions




























Current Folder:

-- View All Surveys --

Manage Folders

Title Search:

Search

Survey Title <div>Sort</div>	Created <div>Sort</div>	Modified <div>Sort</div>	Design	Collect	Analyze <div>Sort</div>	Actions		
Digital Marketing with Gabrielle	November 30, 2010 5:13 PM	175 days ago			 18	Clear	Transfer	Delete
2010 T-Apple Member Survey	January 24, 2010 6:47 PM	1 year ago			 43	Clear	Transfer	Delete
Test Survey	February 2, 2010 3:58 PM	1 year ago			 0	Clear	Transfer	Delete
Connecting with Technology: FSU OLLI	January 10, 2010 9:02 PM	1 year ago			 12	Clear	Transfer	Delete
Family Reunion 2010	December 28, 2009 12:21 PM	1 year ago			 7	Clear	Transfer	Delete
SGMP Florida Capital Chapter Voting Ballot 2009	April 15, 2009 3:47 PM	2 years ago			 37	Clear	Transfer	Delete
SGMP Member Survey	February 18, 2009 12:44 AM	2 years ago			 15	Clear	Transfer	Delete
Workforce Plus Business Survey	February 18, 2009 9:29 AM	2 years ago			 8	Clear	Transfer	Delete
T-Apple Member Survey	January 3, 2008 1:48 PM	2 years ago			 58	Clear	Transfer	Delete

From One Hour Ago....



SurveyMonkey

The best decisions start here™

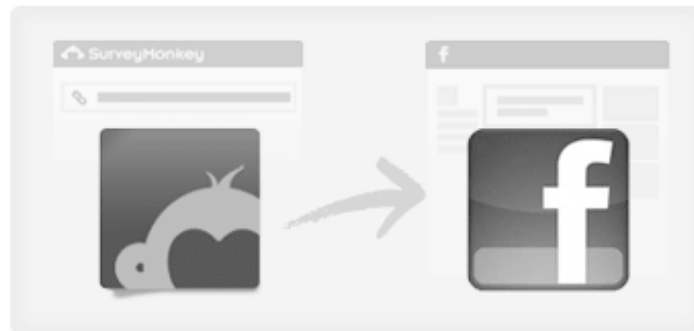
Sign In

Help

New! Embed Your Survey on Facebook

Want to know what your fans really think? And get data you can actually use? With our new Facebook app, you can **easily embed a survey** right on your fan page. Engage your audience, get structured insights, and create original content—all at the same time.

Asking has never been easier.



[Learn More ▶](#)

[Create a Survey »](#)

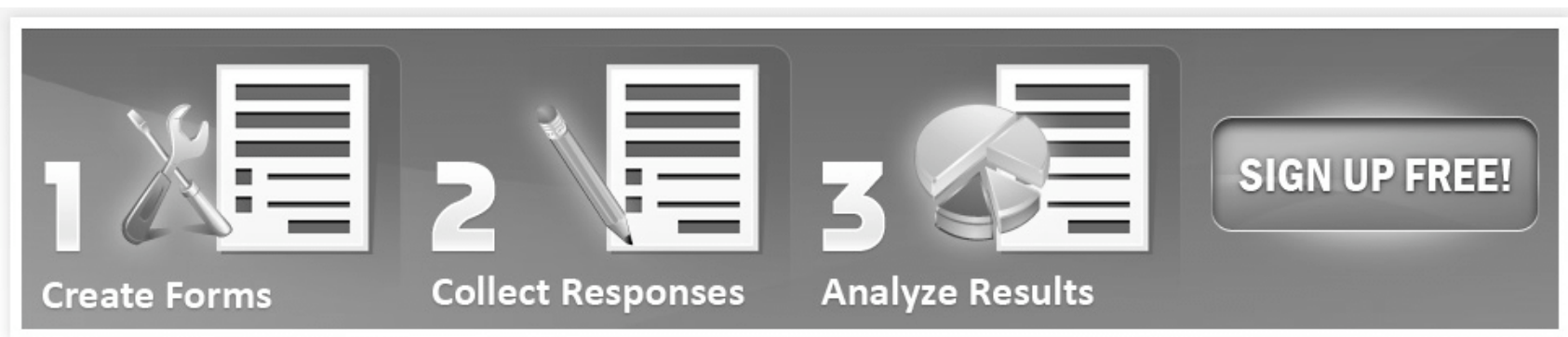
Did You Know?

The day of the week you send your survey out can have an impact on your response rates. We looked across 100,000 surveys to find out what the difference is between Monday and Friday (and every day in between)

See What We Learned »

How to Use this Information

- After this session, *race* to your computer and try a couple of the options.
- Experiment with ease of use in creating different fields.
- Try using existing templates.
- Test how to handle more complex functions including scripting.



Post-Session Website

<http://gabrielleconsulting.com/sgmpse2011>

Questions?

gabrielle@gabrielleconsulting.com

