<table>
<thead>
<tr>
<th>PART ONE</th>
<th>PART TWO</th>
<th>PART THREE</th>
<th>PART FOUR</th>
</tr>
</thead>
<tbody>
<tr>
<td>Get the Look: Creating Your Form with Formstack</td>
<td>Making Your Form Work for You</td>
<td>Saving and Storing Your Formstack Form</td>
<td>Sharing Your Formstack Form</td>
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<td>Basic Form Editing</td>
<td>Using Advanced Default Dates</td>
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<td>How to Embed a Form Into a Facebook Page</td>
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<td>Removing Formstack’s Name From Your Form</td>
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</table>
Creating your form with Formstack is simple. In the first part of this guide, we’ll make it even simpler by walking you through steps such as basic form editing and customizing your form. From finding or creating distinctive templates that fit your needs to using drag-and-drop data fields, Formstack offers a wide variety of tools that will help make your forms valuable to your business.
Exactly what it sounds like:

Here’s where we’ll explain everything in the Build section of the Formstack interface. Additionally, we’ll direct you to the specific support document that will show you how to set up various aspects of your form.
Where do I go to edit my form?

To create a form from scratch, first click on the large plus sign (+) with the words **Create Form** underneath it. From here you will have three options:

- **Field Guide**
  Your go-to resource when you need help. This is where we walk you through the step-by-step process of building a form.

- **Pre-Built Form**
  Here's where you can browse through Formstack’s collection of basic pre-built forms that you can edit to your liking.

- **Blank Form**
  Free rein! This is where you get a clean canvas and can create your form from scratch.

Once you’ve decided whether to use a pre-built or blank form, you can edit your form by clicking on the gray **Build** tab. Your editing tools or form field options will be on the left-hand side of the screen.
What Form Field Options Mean and Links to Setting Them up on Your Form

1. **Short Answer and Long Answer**

These options allow you to ask a question that requires a short or long answer. The Long Answer field can simply be a Comments section so users can communicate with you.

**Long Answer Field** - When you want to let your user talk.

Long Answer Fields are for multi-line responses and large amounts of text, such as comment boxes.

There are two ways to add a field to your form. To add a Long Answer field to your form, click on the Long Answer field option inside the Form Builder Tools box to the left on the Build screen. The field will pop up for editing. After you edit it, click save and the field will appear at the bottom of your form. Or, you can click, drag and drop the Long Answer field over to a place on your form and it will appear in that spot. Then, you will need to click on it to edit it.

The field label will be the question you are asking on that field. You can change the width of the field by setting the number of columns and the height by setting the number of rows.

This is what the Long Answer field looks like on a form:
Short Answer Field • When you just want a simple answer:

Short Answer Fields are intended for simple single-line responses like first name, company name, favorite band, and so on. Short Answer fields can also be used to do calculations.

To add a Short Answer field to your form, click on the Short Answer field option inside the Form Builder Tools box to the left on the Build screen. The field will pop up for editing. After you edit it, click save and the field will appear at the bottom of your form.

Or, you can click, drag, and drop the Short Answer field over to a place on your form and it will appear in that spot. Then, you will need to click on it to edit it. The label will be the question you are asking.

This is how the short answer field will appear on your form. You can change the width of the field by editing the field size.
Select List Field - Select Lists are used to create a list of items that you want a user to choose from. You can either use a predefined list (such as State, Age, Days of the Week, etc.) or create your own list from scratch.

Radio Button Field - Radio Button fields are used when you have a field that has several answer options, but you only want users to be able to select one of those options. If you want them to be able to select more than one option, you would use a check box field.
### Date/Time

Exactly what you think it is. A place for your users to enter either a date, time or both. An example would be if you needed the user’s date of birth.

### File Upload

This is so your user can upload a picture or document to your form. This feature is handy if, say, you created an online job application form and needed your users to upload their cover letters and resumes.

### Name, Email Address, Phone, Address

A fast and easy way to add these to your form.

### Matrix

No, not the one with Keanu Reeves. This matrix is a rating field you can use in surveys and other forms where you want to allow your users to rate or rank multiple items in a single field.

### Number

Allows your user to enter a number. Useful for currency amounts.
### Credit Card
A simple way to allow your user to add a credit card to the form. Do note that if you have this field on your form, you must set up security features, which are discussed later in this guide.

### Description Area
Here is where you can insert rich text (photos, formatted text, links, etc.). This field is for adding your logo, specially formatted information for your users, etc.

### Embed Code
This field allows you to embed HTML, videos, maps and widgets into the form.

### Signature
This allows your users to electronically sign a form.

### Section
Sections are used to add explanatory text or headlines to a set of fields, create a new page on a multipage form and change the layout on some fields without changing the layout of the entire form.

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Now that you’ve created a form, it’s time to make it your form. Ready, set, customize!
We all want to have our own style and “brand,” and anyone can easily design and brand a Formstack form. (You don’t need CSS or custom code to do it.) Let’s explore some ways you can accomplish this.
If you are on any of our paid plans, you have access to our default and custom themes. A theme is the style template that encompasses your form. You can quickly, easily brand your form using a custom theme.

Themes

Create a custom theme directly in the form builder via the Edit Theme tab in the tools at the top of the form builder:

Or directly in the Theme Builder through the main Forms > Theme tab:
Formstack offers an impressive number of things you can alter directly in the Theme Builder without using custom code:

<table>
<thead>
<tr>
<th>Background</th>
<th>Theme Header</th>
<th>Sections</th>
<th>Form</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjust color, pattern and/or add a custom image.</td>
<td>Add custom images/logos to the top of the theme and align them to the left, right or center of the theme.</td>
<td>Change background color, heading text color, heading font, heading font size, text color, font type, font size, and the spacing between sections.</td>
<td>The form is a box within your theme. You can customize the form color, alignment on the webpage, spacing between rows, and add a border to the form.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Labels (field name)</th>
<th>Fields</th>
<th>Footer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Change color (you can select different colors for required labels and non-required labels), font type and font size</td>
<td>Adjust text color, border color, background color, required field border and background color, interior padding, and supporting text color.</td>
<td>Add custom images/logos to the bottom of the theme and align them to the left, right or center of the theme.</td>
</tr>
</tbody>
</table>
Once you have created your theme, you can apply it to your form under the **Settings > General** tab at the bottom. You can also keep things consistent and save yourself time by using the same theme across multiple forms.
Directly on the Form

If a custom theme is more than you’re ready for or able to do, don’t worry! You don’t need a custom theme to customize the style of your form. Images and logos can be directly added to the form itself via a Description Area field. You can click to add this field (or drag and drop the field) from the list of form fields on the left side of your form in Build mode. Once the field is open, click on the image icon within the field, and it will prompt you to upload an image. Once your image is uploaded successfully, choose it from the “image list” and this will add the image to your Description field. You can alter the size and alignment directly in the field with the field edit tools displayed.
You may also want to add company mission statements and slogans where appropriate via Description Area field on your form or in the Header or Footer on your custom Theme. Also, since all our field labels and values can be customized, you say things the way it feels most natural to you and your users. Instead of leaving the address field as Address, why not state it like this:

We know that your branding is what sets you apart from all the others. These easy to use tools help you customize your Formstack form so that it truly represents your brand.
If a picture is worth a thousand words, you’ll save a lot of space by adding some images to your form. There are two ways you can do this. You can either create a theme from scratch, explained here, or you can simply upload an image to your form.
First, click on the form you would like to edit. Next, click on **Description Area**. In the editing tools, click on the **tree icon** seen below. Next, follow these steps:

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Click on <strong>Upload</strong></td>
</tr>
<tr>
<td>2</td>
<td>Click on <strong>Browse</strong> and choose a picture from your computer to upload (you can only use .jpg, .gif, or .png files).</td>
</tr>
<tr>
<td>3</td>
<td>Once you see a box that says, “Your image has been uploaded successfully. Please select the image from the image dropdown box.” Click <strong>OK</strong>.</td>
</tr>
<tr>
<td>4</td>
<td>Click on <strong>Insert/Edit Image</strong>.</td>
</tr>
<tr>
<td>5</td>
<td>Choose your image from the drop-down menu of the Image List. Click <strong>Insert</strong>.</td>
</tr>
</tbody>
</table>

After the image has been uploaded, you can change the dimensions and alignment of your picture.
Adding an image to your notification and confirmation emails is quite similar. Go to your form and click on Settings > Emails and Redirects. Create either a new Confirmation or Notification email. Find the same tree icon and follow the five steps above.

And you’re finished! Your newly added images will make your form as pleasant for your users to look at as it for them to use.
Does Formstack want people who fill out your beautifully crafted form to know who is powering that form so they may also use us in the future? Of course! But if you are paying for our service, we love you enough to give you the option to remove our logo from the bottom of your form.

Unfortunately, just like free services everywhere, you will not be able to remove our ads and logo from the bottom of your form while on our free plan. And please note that if you are a paying customer, you may not want to remove our logo. There is a benefit to leaving it on the form. We call this a Referral Badge. If you leave the logo on the bottom of your form, anyone who signs up through your Formstack Referral link earns you a credit on your account.
Now to the nuts and bolts of removing that Formstack logo (or Referral Badge) from your form.

1. First log into your Formstack account.
2. Go to Forms.
3. Choose the form from which you would like to remove the Referral Badge.
4. Go to that form’s Settings tab > General.
5. Look for Show Referral Badge.
6. Choose No.

In order to change this setting on all future forms, go to:

My Account > Referrals > By default, show a Referral Badge on my forms and landing pages > Choose No.
Once you’ve customized the visual aspects of your form so users can tell at a glance that it’s part of your brand, it’s time to ensure that your form is getting the most helpful information possible from your users. Lucky for you, Formstack has lots of easy-to-use tools that allow you to do just that. In this section, we’ll cover topics such as including tax rules in your form and using advanced default dates in your forms.
When working with Date/Time fields on your forms, you may have run into a situation where you wanted to set a default date that was more than just a month, day and year. Our forms support the ability to enter dates in almost any format, which means we have to run those dates through a date parser. The date parser we use not only supports the standard formats such as 01/01/13 but also a large amount of relative dates.
The standard date formats are all supported:

- **09/31/2000**
- **31/09/2000**
- **2000-09-31**

What is more exciting is that Formstack also supports relative date formats, which allow users to enter a date relative to the time that the form is being filled out:

- **next Thursday**
- **Monday**

When the user submits the form, the current date is used to evaluate the relative dates. The date “next Thursday” will always be in the context of the week the user filled out the form, not when you created it.

The final date format Formstack supports is the calculated date. With this type of date format, you can take the date that the user fills out the form and add or subtract a time period to or from it.

Examples:

- **+1 day**
- **+1 week**
- **+1 week 2 days 4 hours**

The next time you set a default date/time, experiment with the date formats and see what works best for you because, in addition to the formats highlighted above, the date parser supports a mix of all these formats.
So, you’ve created your sales form and have your payment options all set up. Great! In order to simplify things even more, Formstack has another feature that gives our customers the ability to charge a sales tax based on the state or province in which the customer lives. Need international tax rates for your sales? Formstack can do that, too.
To add the tax rules to your form:

1. Go to the **Settings** tab of your form and click on **Plugins**.

2. Click on the **Add** button located next to the Tax Rules option. The Tax Rules option is located in the Order Form section of the page.

3. Map the address, subtotal, and tax fields to the fields on the form. The setup page for the tax rules will give you the option to add as many tax rules to the form as you need.

4. Select the country, state and the tax rates you would like to charge each state. (Make sure to check with your state department of revenue to find out the tax rules for the state in which you reside.)

5. Click **Save Settings** to save these changes.

And . . . finished! That’s all it takes to get the tax rules you need included in your form.
So, what is this “Smart Routing” concept?

In simple terms, Smart Routing is the automated conditional direction and flow that comes into play upon submission of the form.

Smart Routing can be applied to Notification and Confirmation Emails as well as Submit Actions — all found in the Settings > Emails & Redirects tab. We’ll cover each separately.
You may need to create several notification emails that go to different individuals based on selections made on the form. For example, if you are using a registration form to capture registrations for different, unrelated events or sessions, it would be helpful to route each submission to the appropriate individual on your end who is handling each particular event.

Say Sally signs up for the 5-mile race, and Jill is managing the registrations for that race. Bob, your coworker who’s handling the marathon registrations, doesn’t need to see Sally’s registration. To simplify things, you can set up the Notification Email to send 5-mile race registrations only to Jill, rather than Jill and Bob, when the following Smart Routing is applied:

Send Email if ALL of the following match:

Event Type (field from your form) IS 5-Mile Race (selection made on form)
SMART ROUTING AND CONDITIONAL DIRECTIONING

You can apply more than one “condition” if you need more specific Smart Routing. Using the same example above, say Jill just got a new partner that is handling 5-mile race registrations in the month of June, while Jill is handling the 5-mile race registrations in July. That Smart Routing for Jill’s Notification Email would look like this:

Send Email if ALL of the following match:

**Event Type** (field from your form) **IS 5-Mile Race** (selection made on form)

**Event Date** (field from your form) **IS July** (selection made on form)

That way, Jill would get the registration submission if someone opted to register for the 5-mile race in July. It is important not to use “ANY” here because Jill doesn’t need to receive all registrations for the month of July or all registrations for the 5-mile Race. She needs to receive registrations for both conditions as a whole. You would use “ANY” in a circumstance where the individual receiving the notification email needs to receive it if either condition occurs, not both simultaneously.
Confirmation Emails

Confirmation emails work much the same way as Smart Routing with Notification Emails, except that they are set up based on the submitter’s interest indicated on the form. This allows you to create custom messages geared toward the submitter’s selections. Sticking with the race registration example, you may want to create a custom confirmation email message regarding the preparation and training schedule for those running a marathon and a separate one for those running a 5-mile race since these schedules will be very different. So, the Smart Routing would still look like this:

Send Email if ALL of the following match:

- OR -

**Event Type** (field from your form)
IS 5-Mile Race (selection made on form)

But not both.

That way, Toby, who registered for a marathon, will get specific information related to the marathon and not other unnecessary information about other events he is not participating in. Setting up Smart Routing on your confirmation emails is a great way to streamline communication with submitters.
SMART ROUTING AND CONDITIONAL DIRECTIONING

Submit Actions

You can apply Smart Routing to Default and Custom Messages, External URL redirects, the sending of data to external applications (webhooks), and the occurrence of integrations.

Some reasons you may need to control your Submit Actions:

1. You want to display different messages upon submission based on selections made on the form.
2. You want to redirect individuals to different sites based on interests indicated on the form.
3. You only want to pass along data to a third-party database for individuals who meet certain criteria indicated on the form.
4. You have multiple payment options.

One of the biggest reasons to use Smart Routing on a Submit Action is when multiple payment options are offered on a form. If you don’t have different payment options set up on your form yet, you could use a Radio Button, Select List or Check box field to allow individuals to choose their payment method. You might prefer to use a **Radio Button field** because it only allows for one selection.
**SMART Routing AND Conditional Directioning**

You must set up Smart Routing on your payment processor Submit Actions ([Settings > Emails & Redirects tab]) in order to accept multiple methods of payment that include a payment processor integration.

Therefore, your Smart Routing on your payment processor Submit Action would look like this:

![Smart Routing Example](image)

Perform action if ALL of the following match:

- **Choose Your Payment Method** (field from your form)
- **IS Credit Card** (selection made on form)

That way, upon submission, the payment processor would not run unless credit card was selected as the payment method.

*It is important to note that you cannot set more than one redirect Submit Action (or a Default/Custom message with a payment processor redirect – PayPal Standard and Google Checkout) to occur at the same time UNLESS they are separate actions set to occur in different instances based on Smart Routing.

So, take control and conditionally direct – or Smart Route – your form data and form actions!
If you are collecting sensitive, identifying information such as (but not limited to) passport, bank account, credit card or driver’s license numbers, you MUST enable SSL. **SSL** (Secure Sockets Layer) is a protocol for providing secure communications on the Internet. SSL provides for the authentication and encryption of traffic between your browser and Internet servers.
To enable SSL on your form, go to Settings > Security and click yes next to SSL. After enabling this feature, you will notice that the original "http" in the URL has now changed to "https," which stands for HyperText Transfer Protocol Secure.

When you enable SSL on your form and you embed it on a website that does not have a security certificate, your form will still be secured by Formstack, even though the URL on the embedded website will not display the "https." Below is an example of an embedded form with SSL enabled, displayed on a nonsecure website.
Although your form will always be secure, it might be a good idea to secure your website as well so that individuals filling out your forms will not be confused by the seemingly unsecure URL. If you would like to add a security certificate to your website, simply contact your website provider for their pricing plans and features. If your website is a custom, personal domain, you can obtain a security certificate from a provider (GoDaddy.com, for example).

If you decide it’s not necessary to obtain a security certificate for your personal website, after you turn on SSL, you can always choose to display the “Form Secured by Formstack” logo at the bottom of your form so users know their data entry is definitely secure. To display this logo, click on Form Extras when in Build mode. Then, click on Secure Logo and check the box to Show Secure Logo.
There are other ways to protect your data as well:

**Password-only access to form** (for entry/submission):

You can password protect your forms if you would like to prevent just anyone from accessing them. To do this, go to **Settings > Security > Use Password**. Pick a password and click on **Save Settings**.

**PGP email encryption** (for notification emails):

You MUST use PGP if you are e-mailing sensitive data to yourself, such as credit card or social security numbers. Regular e-mail is not a secure method for sending sensitive data and violates our **terms of service**.

**Database Encryption** (for your form database):

You MUST enable data encryption if you are collecting sensitive data such as credit card or social security numbers and storing them in your Formstack database. If you do not do this, you are violating our terms of service and your data is NOT secure.
When you set up your form to save data for later downloading and viewing, you can set a password to encrypt the data when stored in the Formstack database. When you set a password, public and private keys are generated and stored with your form. The public key is used to encrypt the data when saved in the database. Your password encrypts the private key, which will be used to decrypt the data. Your encryption password is not saved on the server in plain text, so it’s not possible for anyone to decrypt the information without knowing your encryption password.

To enable data encryption on your form:

1. Click on the **Settings** tab for your form.
2. Scroll down to **Security**.
3. Enter a new password in the **Encrypt Saved Data** field. You will have to verify the password to continue.

If you do not see the Data Encryption option, your account plan does not give you access to those features.

Note: You do not need to enable data encryption if you are not saving collected data in the database. File attachments are not encrypted.

These options should provide you with ample means of securing the data you gather on your forms.
Many of our customers use form themes. Wouldn’t it be nice to stretch the themes you have to their maximum ability? In this post, we will show you how to take advantage of one Formstack theme and apply that styling to multiple forms.
Before we begin, if you need a quick overview of Formstack Themes & CSS, follow this link. We will not be applying styling by simply selecting colors on the Style tab. Rather, we will be using CSS (cascading style sheets) to apply the styling we want on our form. You will also need to know your way around the HTML Inspect feature of your browser to follow this tutorial. If you are not sure how to find the Inspect tool, here is a quick refresher.

**Chrome**: Right-click on a page element and select **Inspect Element**.

**Firefox**: Right-click on a page element and select **Inspect Element**. Or go to **Tools > Web Developer > Inspect**.

**Safari**: First, enable the developer tools in the Advanced pane of Safari preferences. Now you can right-click to **Inspect Element**.

**IE**: First, enable the developer tools in Internet Explorer settings. Right-click to **Inspect Element**.
To begin, let’s cover one basic of CSS. An “ID” is an attribute that can be assigned to an HTML element such as a div, title, button, form field, etc. IDs are specific to the element to which they are assigned, which means they can only be used one time. The Formstack builder assigns a specific ID to most elements on a form. What this means is that we can target one element ID from Form A and also target the same element on Form B, because each has a specific ID applied. Let’s look at an example.

Here we are targeting the submit button for two separate forms in one single form theme. In the screenshots below, you can use the inspect element to find that our Form A has a submit button ID of fsSubmitButton1366529 and Form B has a submit button ID of fsSubmitButton1366530. Because these IDs are specific to the form, we can write CSS for both of them in a single theme. Both forms will reference the same CSS, but only the appropriate ID styling will be applied.
We will style the button of Form A to be **green** and the button of Form B to be **orange**.

Here is the styling we have applied on our Formstack theme that targets both buttons on both forms. The single theme is applied on both forms under Settings.
One of the most powerful aspects of Formstack is the ability to use multiple payment processors, third party integrations and other submit actions. A submit action is an action that takes place after the user hits the submit button. These include redirects to other websites, custom thank-you pages and the passing on of online form data to other applications, such as payment processors, CRM systems, email service providers, etc. You could, for example, pass on data to Salesforce, Authorize.net, Mailchimp and Google Spreadsheets in a single online form.
You can view your form’s submit actions under Settings > E-mails & Redirects > After the Form is Submitted.

When you add a third-party integration to your form, a submit action for that integration will be automatically added for you. If you want to add a URL redirect or custom thank-you page, you will need to add those yourself under Settings > E-mails & Redirects > After the Form is Submitted.

To add more actions to the list, you can hit the plus button (+) to the right of the action. The minus button (-), by the same token, can be used to remove actions. Always make sure you hit the Save Settings button when you are done setting up your submit actions.
Some actions can be performed at the same time, such as sending info to third parties, but other actions, such as redirecting to another website, can only happen once. This is because once a user leaves your form, Formstack no longer has control of that user’s browser, so we can’t send them on to another website.

What this means is that while you can redirect a user to PayPal or send them to a custom thank-you page, you can’t do both. This is where smart routing comes in.

Smart routing allows you to decide which action you want to occur based on questions your user has answered on your online form. So let’s say you have a question on an online order form, such as “How do you want to pay?” with options for “check” or “PayPal.” If the user chooses “check,” Formstack can display a custom thank-you page showing them instructions on how to send in a check. If they choose “PayPal,” we can redirect them to PayPal instead.

When you can’t or don’t want to perform certain actions, this is when you want to use smart routing.
Now that you’ve customized your Formstack form to fit your brand and tweaked it so that it’s gathering the information you need most, it’s time to make sure your work is properly saved and stored. In this section, we’ll cover topics including archiving forms and moving them into folders.
Moving Your Forms into Folders

Formstack’s top three form plans allow for the possibility to have 20, 100 or up to 1,000 forms in your account at one time. The thought of having to search through 100 forms to find the one you need is enough to give anyone a headache, and when your account approaches 1,000 forms, it can be close to impossible to quickly find the form you want. The solution to this problem is to organize your forms into folders.
The first step is to create the folders you will need by clicking on the plus sign (⁺) next to the little icon of a house on the forms page. You will want to give each folder a name that will let you quickly identify the forms in each folder. The folders will be located along the top of the Forms tab.
The next step is to move the forms into the folders you have created. There are two options that will allow you to drag and drop forms into folders in your account. The first option is to drag and drop the form directly into the folder at the top. The other option is to click on the form and drag it down to the Move Folder icon at the bottom of the page. A drop-down list will appear that gives you the option to select the folder that you would like to place the form into.

The ability to separate the forms into folders will greatly reduce the time spent looking for forms in larger accounts and ensures that your account stays organized and easy to use.
We have a number of Formstack customers who only use our forms during certain months of the year, like the months surrounding a major company event or if they operate a seasonal business. For those customers who only want to pay for the months they need the forms, we make this possible by allowing our customers to upgrade and downgrade their accounts at any time. This allows Formstack customers to keep the forms they create year round and not have to pay for the months they are not using their forms.
ARCHIVING FORMS

We currently offer a free form plan that allows users to keep their accounts without paying for extra months. However, keep in mind that accounts that have not been logged into will be deleted after six months of inactivity. The free plan allows for three forms to be active on an account. This means any additional forms need to be disabled and sent to the Archived folder so that when the time comes to use them again, they will be ready at a moment’s notice.

To archive a form:

1. Go to the Settings tab of the form you want to disable.
2. Under General Settings, select when you'd like the form to be disabled and click Save Settings — your form will be archived until you need it again. You'll need to do this for every form you want to archive.

To unarchive a form:

1. You will first need to upgrade your account by clicking on My Account > Billing and click on Upgrade by the plan that you would like to choose. You can skip this step if you are not at your allowable amount of total forms.
2. Next, click on Forms > Archived to view all of the forms that have been deactivated.
3. Click on Settings and change the Disable Form drop-down option from Now to Never.
4. Click on Save All Settings.

That’s all there is to it! The form is now active. Simply repeat this step for each form that needs to be activated on the account.
Current Formstack users have the ability to copy any of their forms to another user’s account or even to someone who doesn’t yet have a Formstack account.
How Our “Copy to” Feature Works

While in the Forms tab in your account, hover your cursor over the thumbnail of the form you wish to copy until you see several icons appear. Click on the Copy to icon to copy the form. You’ll see an option to copy the form to My Account or Other Accounts. Select Other Accounts.

To copy your form to another account or to multiple accounts, insert the email address(es) to which you want to copy the form. You can create a custom message that will show in the email Formstack sends alerting them that a form has been shared. You have two options for copying your forms to another account: You can copy only the form, or you can copy the form and any integrations tied to that form. If you want to copy only the form, your integrations and credentials will be removed from that form (in the other user’s account) and the user you sent the form to can use their own credentials for any integrations.
Copying Forms to Someone Who Doesn’t Have an Account

Copying a form to someone who doesn’t have a Formstack account is just as easy! Formstack will auto-create a free account for that person based on the email address you provide. That person will receive an email providing them with access to the copied form and any of its integrations (if you chose to share integrations). The new user will simply need to create a password for their free account to access the copied form. The form can be used in the free account with its integrations; however, if they want to upgrade to any of Formstack’s paid plans and create more forms, they can at any time. Note, they MUST upgrade to a paid plan if they want to use the integrations.

Why Would You Want to Copy Your Forms?

This feature gives Formstack users the power to create and copy forms to other users, who then have the ability to edit and manage the form as if it were built by them. There are many reasons you might want to share a form in this way. For example, if you are a web designer or developer that often creates online forms for your clients, you can copy the forms you build into your clients’ accounts, giving them full access to edit and manage the forms going forward, if necessary. Marketers within an organization can create forms using design templates that are consistent with the organization’s branding and copy those forms to users within different departments to ensure that everyone in the organization is using online forms that comply with brand standards.
It’s time to get your form out there and let it start collecting data for you. In this section, we’ll discuss how to embed forms into Facebook pages and websites, add share buttons to your forms, and other ways to get your form in front of people.
Facebook is a great way to get people to like and share your business news, but sometimes you want more than a like. Maybe you want to sign up people to receive your newsletter or have customers enter more information for a contest. That’s where using a Formstack form in Facebook can help. Below we outline the best way to build and embed a Formstack form into your Facebook fan/business page.
Step 1:

To create a new tab, first log in to https://developers.facebook.com/apps — you can login with your normal Facebook username and password.

Step 2:

Click Create a New App at the top left. A dialog screen will pop up and you can give your “Tab” a name. The “App Namespace” is basically the unique ID your app will be given.

Note: You don’t have to worry about the hosting option for this simple setup.
Step 3:

The next step can look a bit intimidating, but it’s really fairly simple. Look for the **Page Tab** option near the bottom of the page. Clicking it will expand your options for your tab.

You will want to give your tab a name and create a URL. The URL you use will be your form URL. You can find your form URL in the Publish tab in your Formstack account. You can also add an image for your tab, but this step isn’t completely necessary. Ideally, you would want to add an image that would match your campaign, be it a contest, lead generation campaign, etc.
This next step is a bit trickier, but just stay with us. You will need to add your tab to your Facebook page. The URL you will need is:

https://www.facebook.com/dialog/pagetab?app_id=YOURID&next=YOURURL

You can find your ID and your URL in the Facebook settings you just set up. The app ID can be found at the top of your tab settings.

The URL is the URL you gave when setting up the tab options, and in this case it is your Formstack form’s URL.
If you have entered the above information correctly, you should see a page that looks like this:

Once you add to the page, you can go to your Facebook page and you should see a tab with your form!

Once you click on the icon for your tab, you should be taken to the tab and should see your form. Users can submit information via your form just like they can anywhere else. Remember, you can still use Formstack’s features including confirmation emails, integrations, etc. You can direct users in campaigns (email, Twitter, etc.) to that tab by just copying and pasting the tab URL that you see in your browser’s URL address.
This new feature allows the forms’ users to automatically post the form link to Twitter, Facebook and LinkedIn accounts straight from the form. It’s a great way to get more views, which means more submissions, more contacts, more volunteers and more customers.
Here’s how it works:

1. While editing your form, click on the Settings tab. In the left-hand column, you’ll see Plugins at the bottom of the list. Click that.

2. Next, you’ll want to go to the Utilities section and there you will see the Share Buttons option. Click Add. Once you click that, you’ll see Share Buttons add to the list of items on the left. It will turn bright yellow once it’s been added.
3 Next, click on the **Share Buttons** tab to bring up this screen. Here you will see a field that allows you to edit the message to share. This message will be the automated content sent with the link when people click on one of the share buttons within your form. You’ll want to make this clear, concise and to the point. Be sure to click **Save Settings** when you are finished.

4 Now that you have finished editing your form, you are ready to publish. Once you click the **Publish** tab, click on the link to make sure everything is working properly. Since you have activated the share buttons on your form, you should now see this at the bottom of that page.
In order to share your form, just click one of the options. In this example, Twitter has been selected. Once you click one of the social options, it’ll prompt you to verify your account. After that, you’ll see the pre-populated message you created along with the link to your form!
At Formstack, we love forms and all they can do for our clients’ businesses and organizations. This Formstack Primer should provide you with a strong foundation of ways to make your forms work for you. We also know you might have more questions. Maybe you need more support on a particular topic. Perhaps you’d like to do more advanced customization, using CSS or other programming. Fortunately, we have answers. From our blog to our support team, we’re here for you if and when you need us. Happy form building!