Sales Countdown extension for Magento2

User Guide

Version 1.0

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I) Introduction

The document is a User Guide for extension Blue Form Builder created for Magento2 websites. It describes the extension functionality and provides some tips for a quick start.

The **Blue Form Builder Extension** lets you create as many forms as you want. With the simple and intuitive drag and drop form builder, you can create desired form in just a few minutes without writing any code. All you need is to drag and drop 25 form elements into the editor and customize them according to your requirements. Creating unlimit form has never been easier!

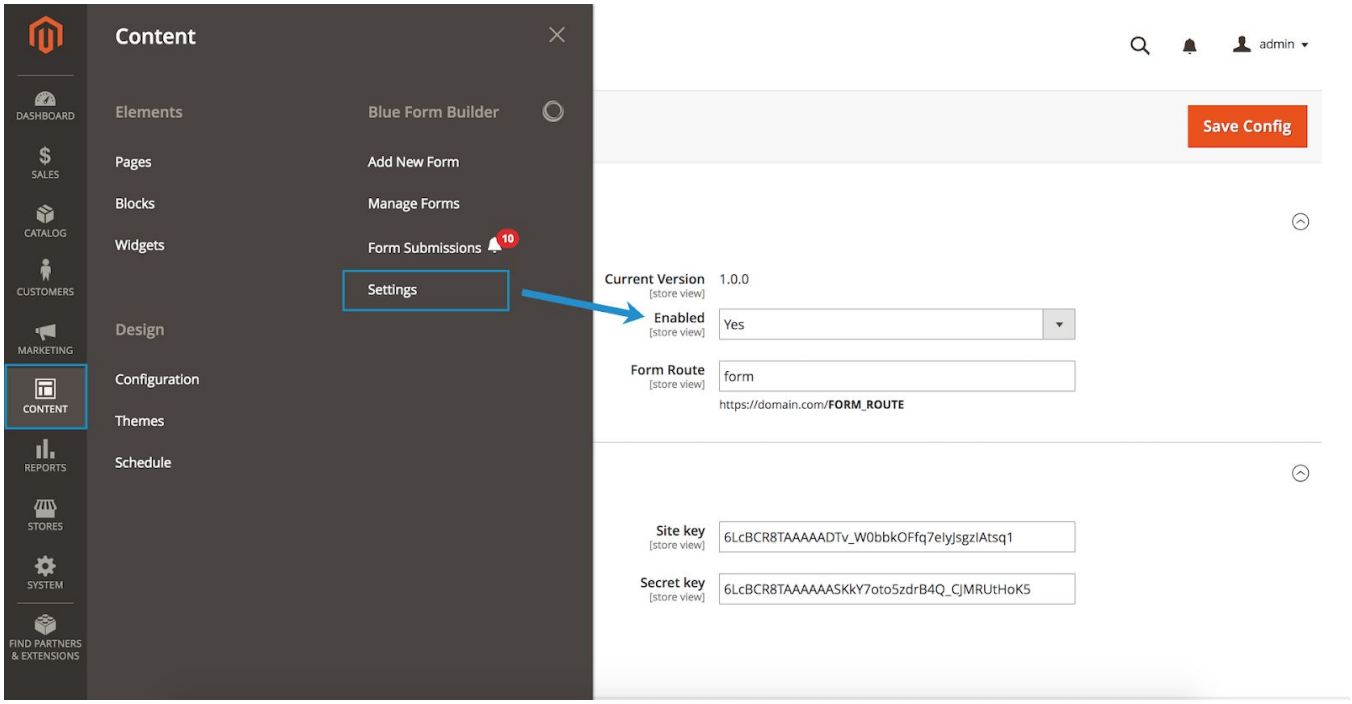
- Simple Drag & Drop Form Builder
- Smart Conditional Logic
- Multiple Page Forms
- 9 Form Templates
- Support 25 Form Elements
- File Uploads
- Fully Customizable Email Notifications
- Manage Form Submissions in the Backend
- Google reCaptcha Integration
- Easy to use Predefined Variables
- Easily Customizable with Skin Builder
- Advanced Validation
- Responsive Mobile Friendly and 100% AJAX-based frontend design
- Easy to Embed

II) Installation

1. Backup your web directory and store database
2. Download extension installation package
3. Disable Magento Cache run command php bin/magento cache:disable using SSH from your magento root directory
4. Upload contents of the extension installation package to your app/code/BlueFormBuilder/Core directory
5. Then run command php bin/magento setup:upgrade using SSH from your magento root directory
6. Enable Magento Cache run command php bin/magento cache:enable using SSH from your magento root directory

III) General Configurations

The Blue Form Builder extension can be enabled or disabled globally or per certain store view following **Content > Blue Form Builder > Settings**



Form Route: URL prefix for all form pages

Enable ReCaptcha: a free Google spam protection service, by entering your personal API keys. These can be obtained by signing up here.

IV) Manage Forms

1) List of Forms

Once the extension has been installed, section **Blue Form Builder** appears in the Content menu **Content -> Blue Form Builder -> Manage Forms**

Click on the **Manage Forms**, you will redirect to a page which contains the list of existing forms.

You can apply the following actions:

Filter: search based on the current filters

Mass Actions: lists the following actions applied to the selected forms in the list

- **Delete:** removes the chosen forms from the list.
- **Change Status:** changes statuses of the chosen forms.

Forms per page: shows how many forms can be displayed per page.

ID ↓	Name	URL Key	Submissions	Status	Created	Modified	Action
1	Contact Us	contact-us	1	ENABLED	Mar 22, 2018 10:59:15 AM	Apr 1, 2018 5:08:47 PM	Select
2	Contact Us 2	contact-us2	0	ENABLED	Mar 22, 2018 12:01:15 PM	Apr 1, 2018 5:08:54 PM	Select
3	Contact Us 3	contact-us3	1	ENABLED	Mar 22, 2018 12:03:33 PM	Apr 1, 2018 5:09:04 PM	Select
4	Delivery Feedback	delivery-feedback	1	ENABLED	Mar 23, 2018 6:13:10 AM	Apr 1, 2018 5:09:12 PM	Select
5	Online Booking Form	online-booking-form	0	ENABLED	Mar 23, 2018 7:14:26 AM	Apr 1, 2018 5:09:34 PM	Select
6	Book an Appointment	book-an-appointment	1	ENABLED	Mar 23, 2018 7:32:18 AM	Apr 1, 2018 5:09:41 PM	Select
7	Customer Satisfaction Survey	customer-satisfaction-survey	1	ENABLED	Mar 23, 2018 7:41:07 AM	Apr 1, 2018 5:09:48 PM	Select
8	Booking - Multiple Page	booking-multiple-page	0	ENABLED	Mar 23, 2018 8:12:48 AM	Apr 1, 2018 5:09:57 PM	Select
9	Customer Service Survey	customer-service-survey	0	ENABLED	Mar 31, 2018 11:14:49 AM	Apr 1, 2018 5:10:09 PM	Select

The list provides the following columns:

ID: defines the ID of created forms.

Name: displays the form's name used for inner purposes.

URL Key: url key of form on frontend

Submissions: shows how many times the forms are submitted by users:

Status: indicates the current status of the form: enabled or disabled.

Actions: lists action applied per form:

- **Edit:** opens the form for editing
- **Delete:** deletes the form from the list
- **View:** direct to form page on frontend

2) Add New Form

To create a new form, click **Content -> Blue Form Builder -> Add New Form**, a popup will be displayed, there are 4 options:

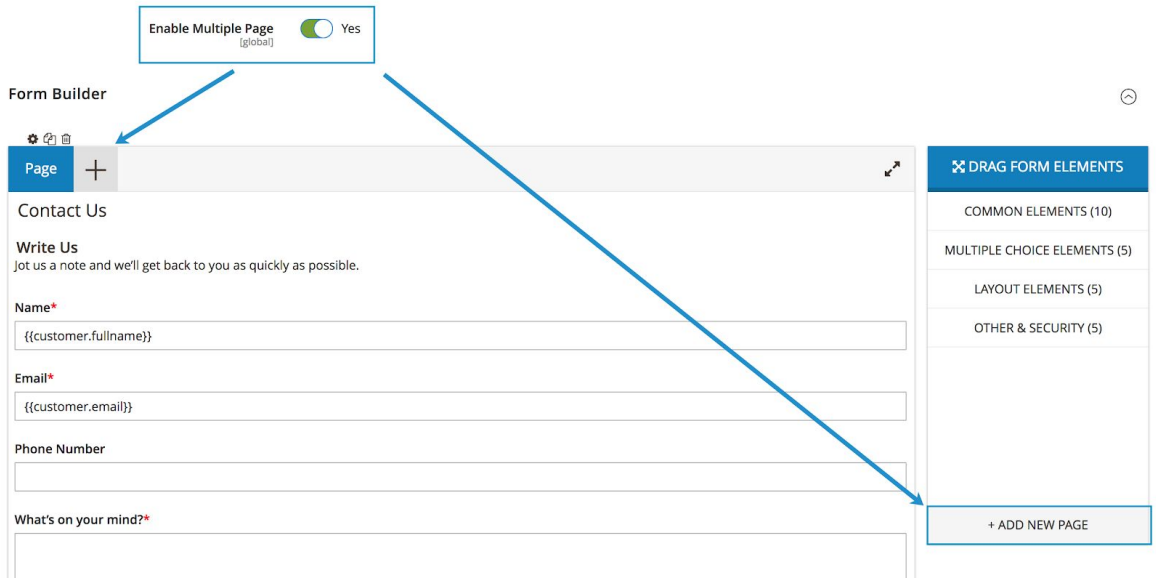
- **Blank:** Create a new form from scratch
- **Template:** Select 9 pre-built form templates
    - Book An Appointment
    - Booking - Multiple Page
    - Contact Us
    - Contact Us2
    - Contact Us3
    - Customer Satisfaction Survey
    - Customer Service Survey
    - Delivery Feedback
    - Online Booking Form
- **Duplicate:** duplicate based on a existing form
- **Import:** import form file template. Example: transfer from local to online, export form on local, then import on online store

3) General Settings

Form Name: Name of form.

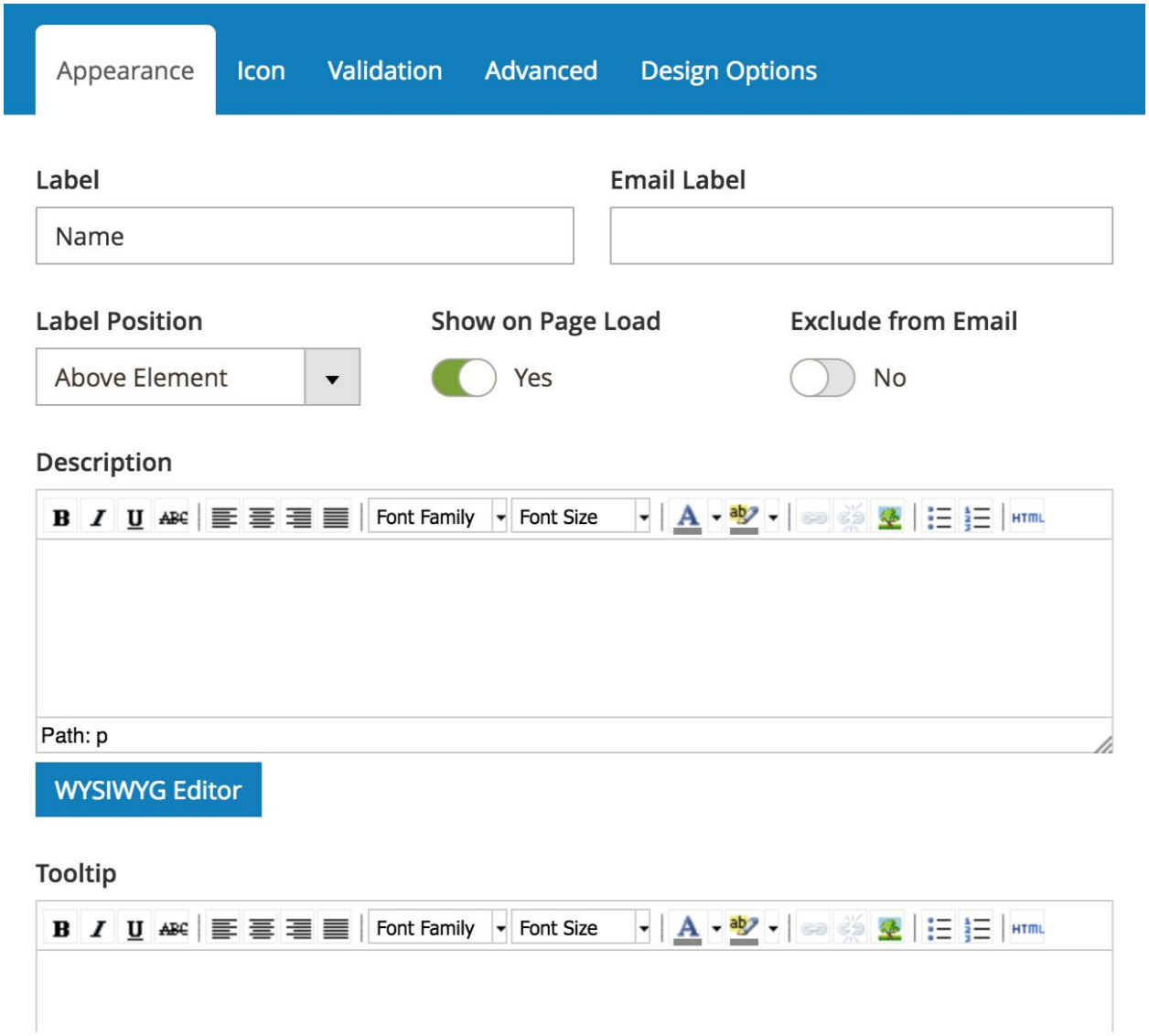
Enable Multiple Page: enable multiple page function, you can break long forms into multiple paginated sections

Click **+** to add new pages



4) 25 Form Elements

After drop an element into the form builder, a popup will be displayed:



Here are the common field of all most elements

a) Appearance

Label: Label of element.

Email Label: Label of element in email content, empty for using **Label**.

Label Position: there are 5 options:

- Above Element
- Bellow Element
- Left of Element
- Right of Element
- Hidden

Show on Page Load: display element on page load.

Exclude from Email: Remove field in email content.

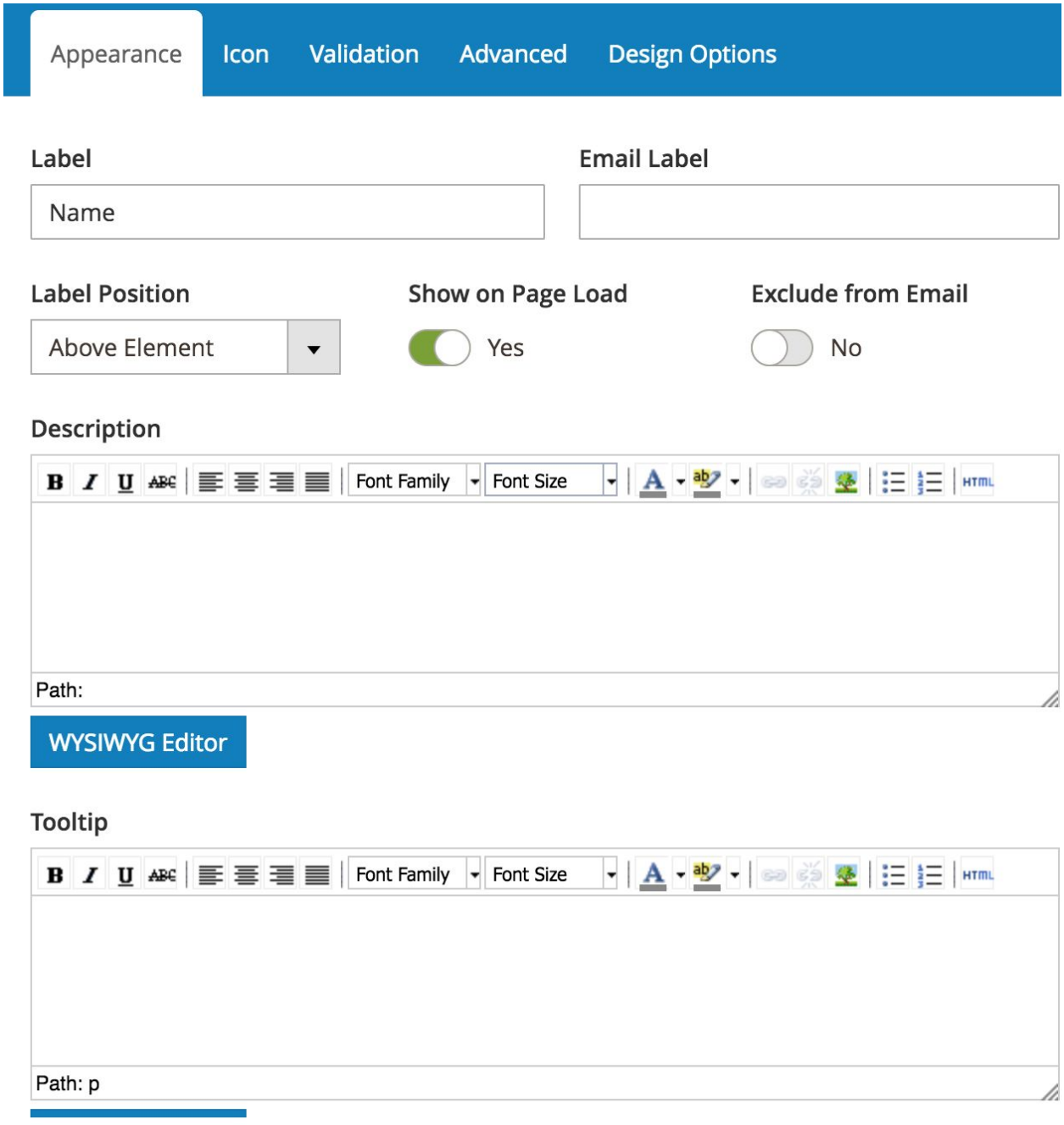
Description: You can add HTML, Image, etc. using editor, it displays under element.

Tooltip: You can specify an additional text that will be displayed in the tooltip on the frontend..

Element ID: Make sure it is unique and valid according to w3c specifications.

Element Class Attribute: additional classes of element.

Element Name: Make sure it is unique. You can use in email content like **[ELEMENT NAME]**


Appearance
Icon
Validation
Advanced
Design Options
Label
Name
Email Label
Label Position
Above Element
Show on Page Load
Yes
Exclude from Email
No
Description
Font Family
Font Size
HTML
Path:
WYSIWYG Editor
Tooltip
Font Family
Font Size
HTML
Path: p

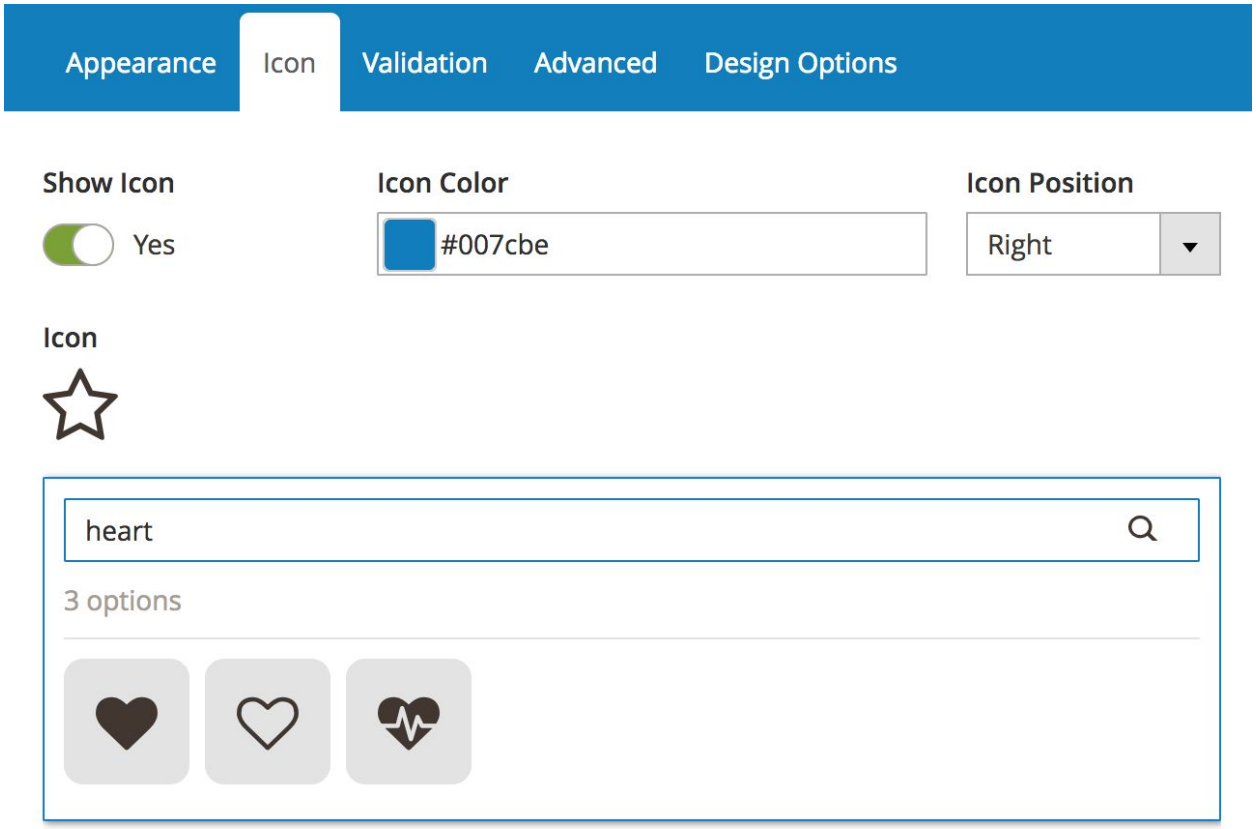
b) Icon

Show Icon: enable/disable icon

Icon Color: choose any color from the color pantone

Icon Position: there are 2 options left/right

Icon search tool: type in the input and you will find the exact icon easily, for example: “heart”



c) Advanced

Required Field: makes the element required or optional.

Hidden Field: makes hidden field.

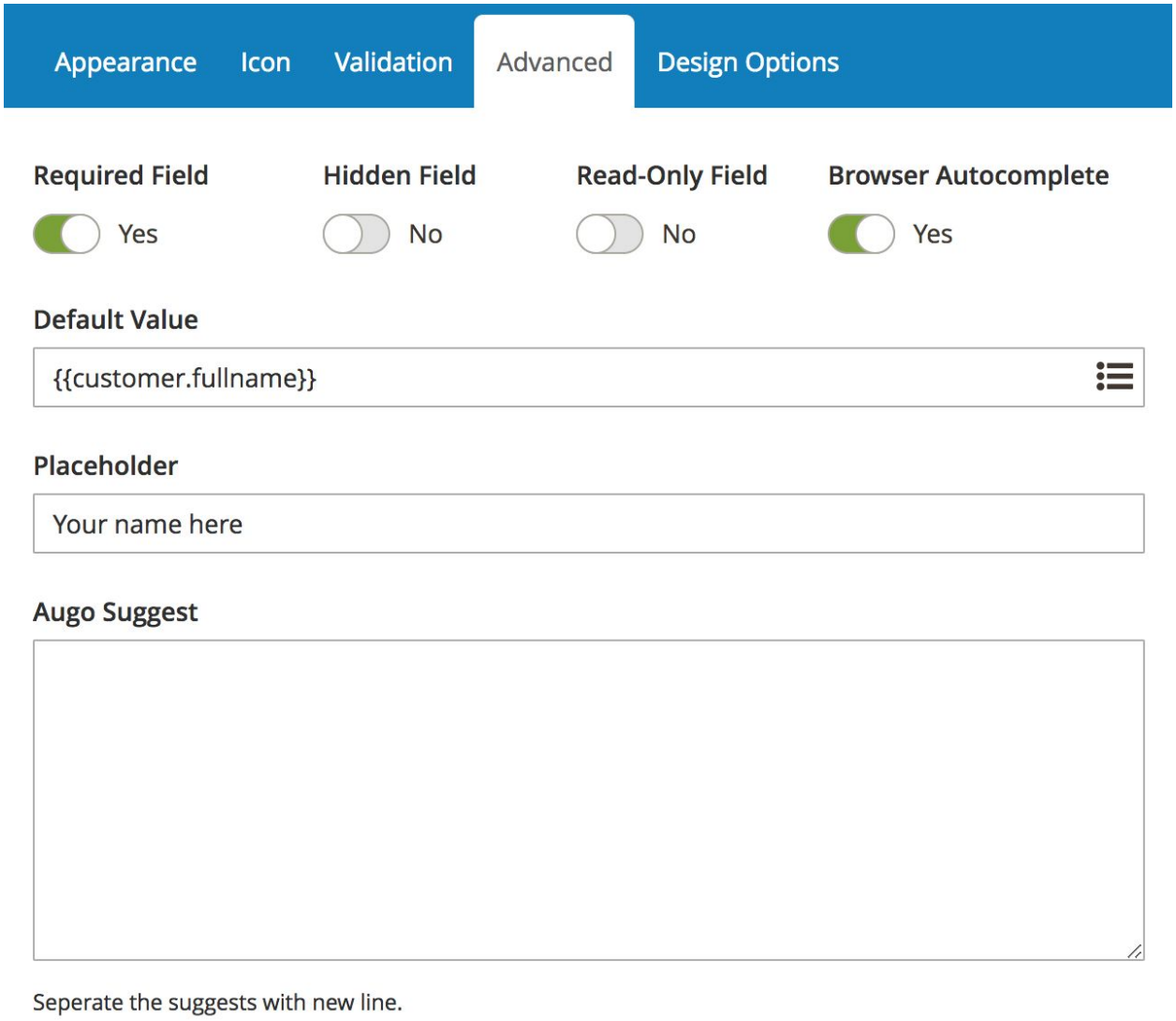
Read-Only Field: customer only can see, can not change.

Browser Autocomplete: enable/disable autocomplete.

Placeholder: can be shown inside input fields.

Default Value: You can optionally enter a default value for input fields, which also support automatically prefilled variables:

- **Customer:** ID, first name, middle name, last name, email,etc
- **Page:** URL Key, title.
- **Product:** ID, name, sku, price, special price,etc



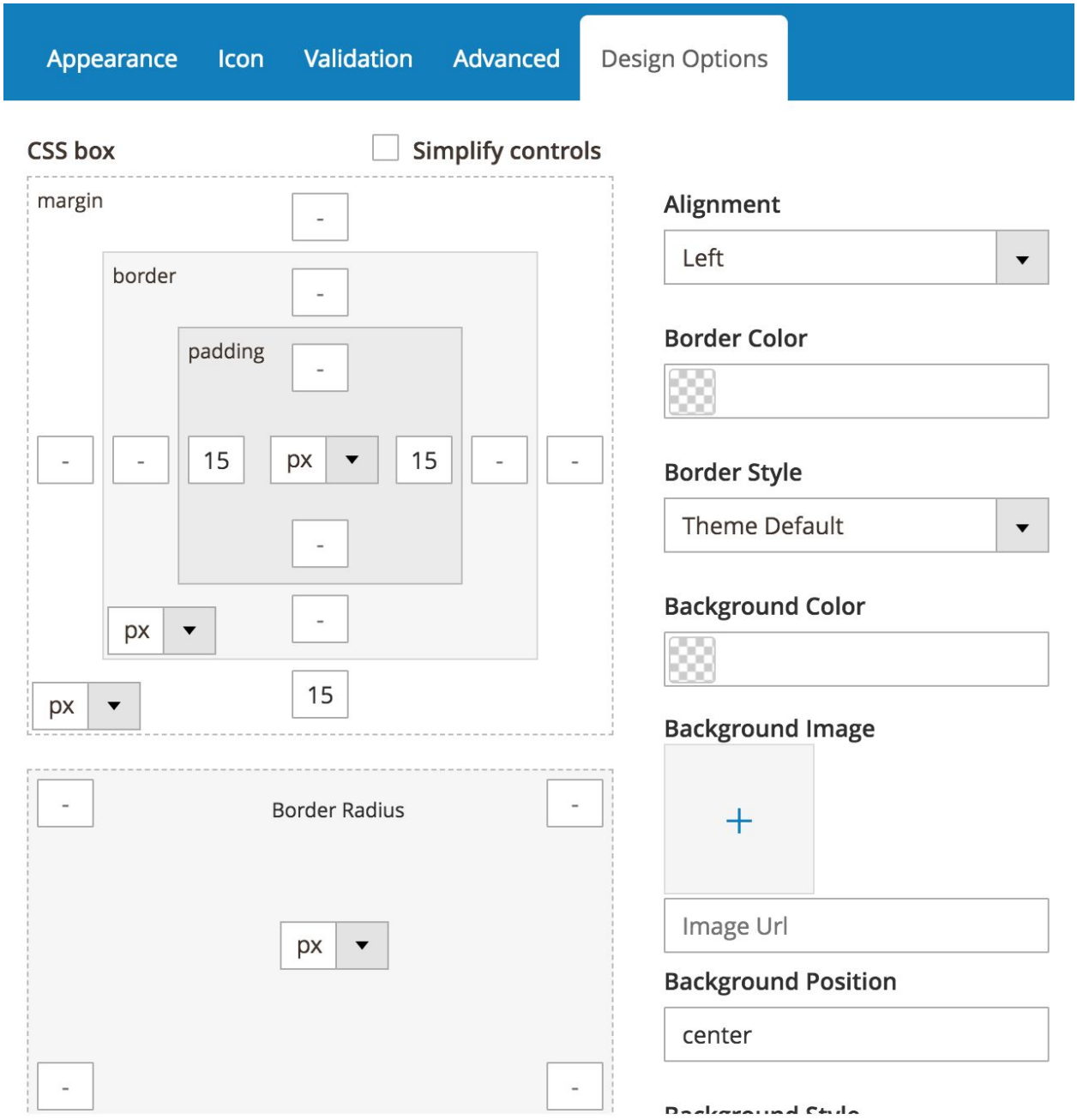
d) Design Options

Tick **Simply Controls** to apply the same customized size onto the form's width and length (top, bottom, left, right)

Border Color/ Background Color: choose a color from the pantone

Border Style/ Background Style: choose one from the given options

You can import image by adding URL link in **Image URL** box or insert image in our store


Appearance
Icon
Validation
Advanced
Design Options
CSS box
Simplify controls
margin
border
padding
15
px
15
Border Radius
Alignment
Left
Border Color
Border Style
Theme Default
Background Color
Background Image
Image Url
Background Position
center

4.1 Common Elements

4.1.1 Single Line Text

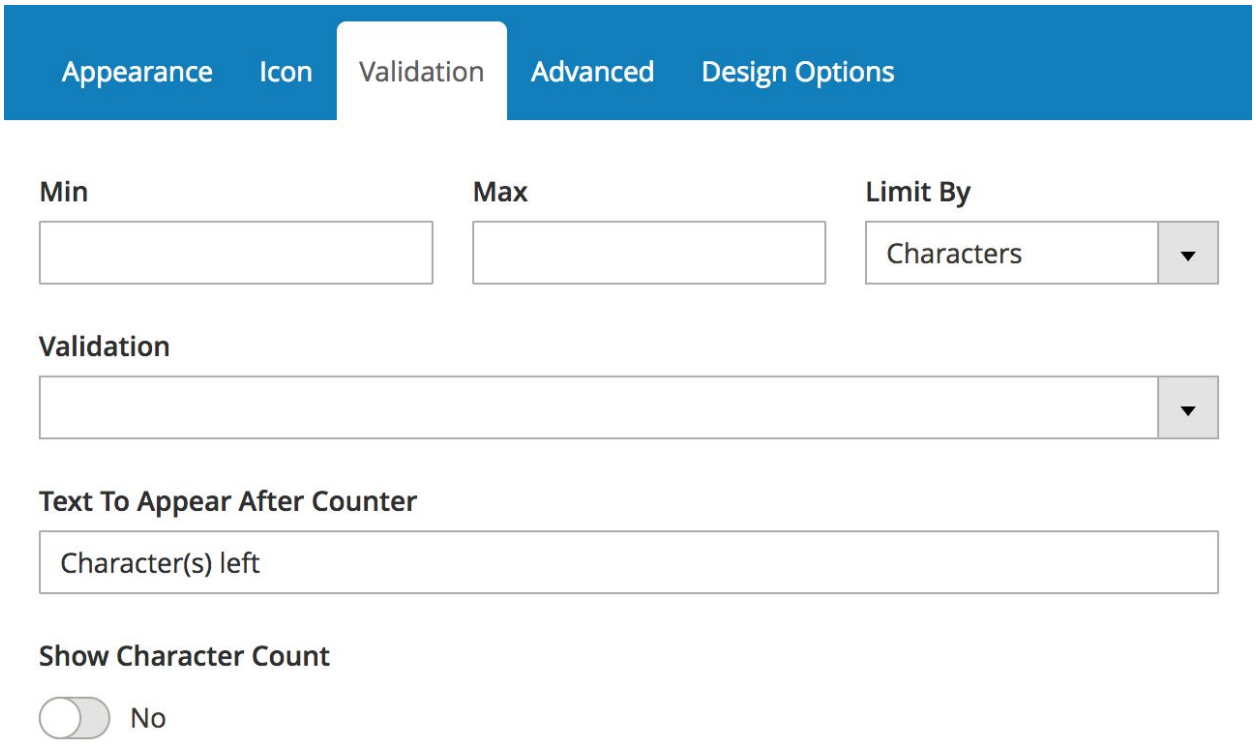
Min, Max: insert the number limitation of characters or words

Limit By: Characters or Words

Text To Appear After Counter: show how many characters/words left

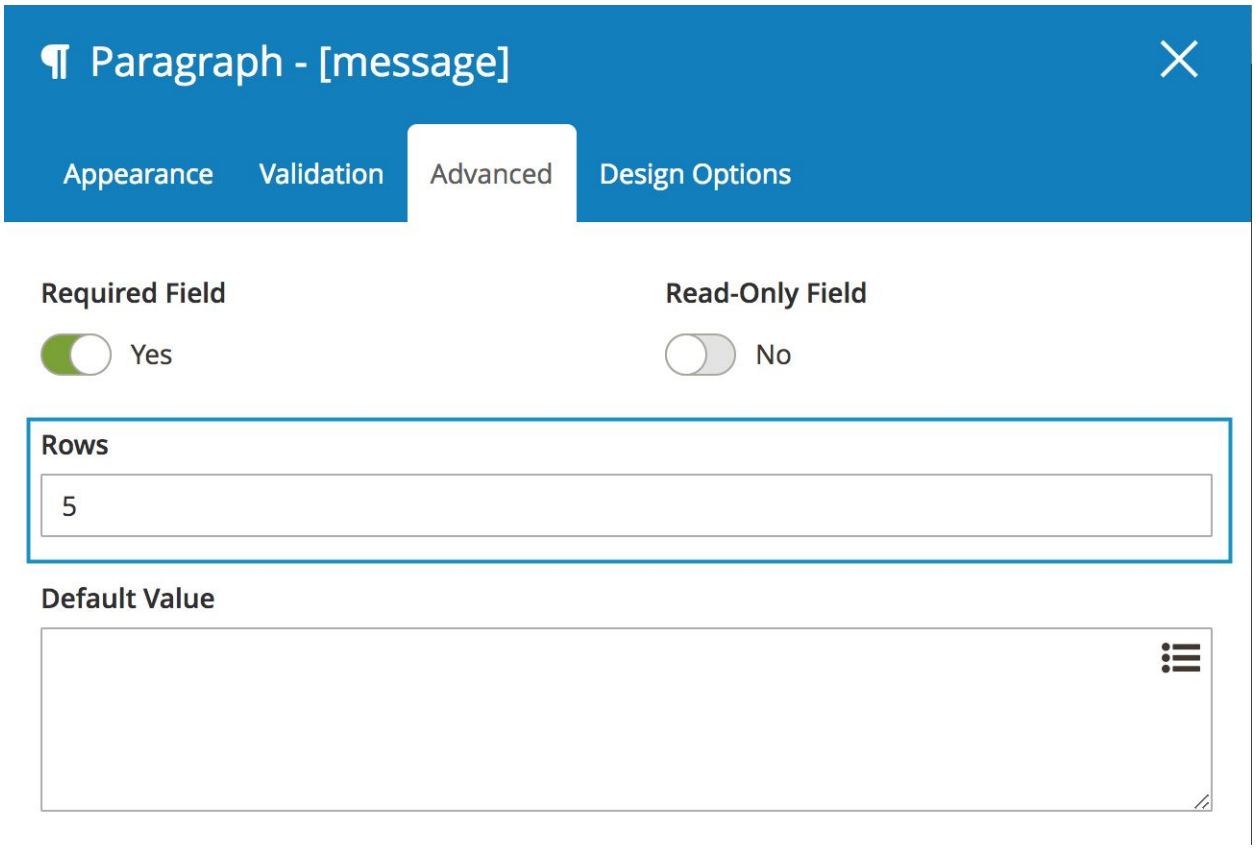
Show Character Count: enable/disable character counter

Validation: choose type of content validation here



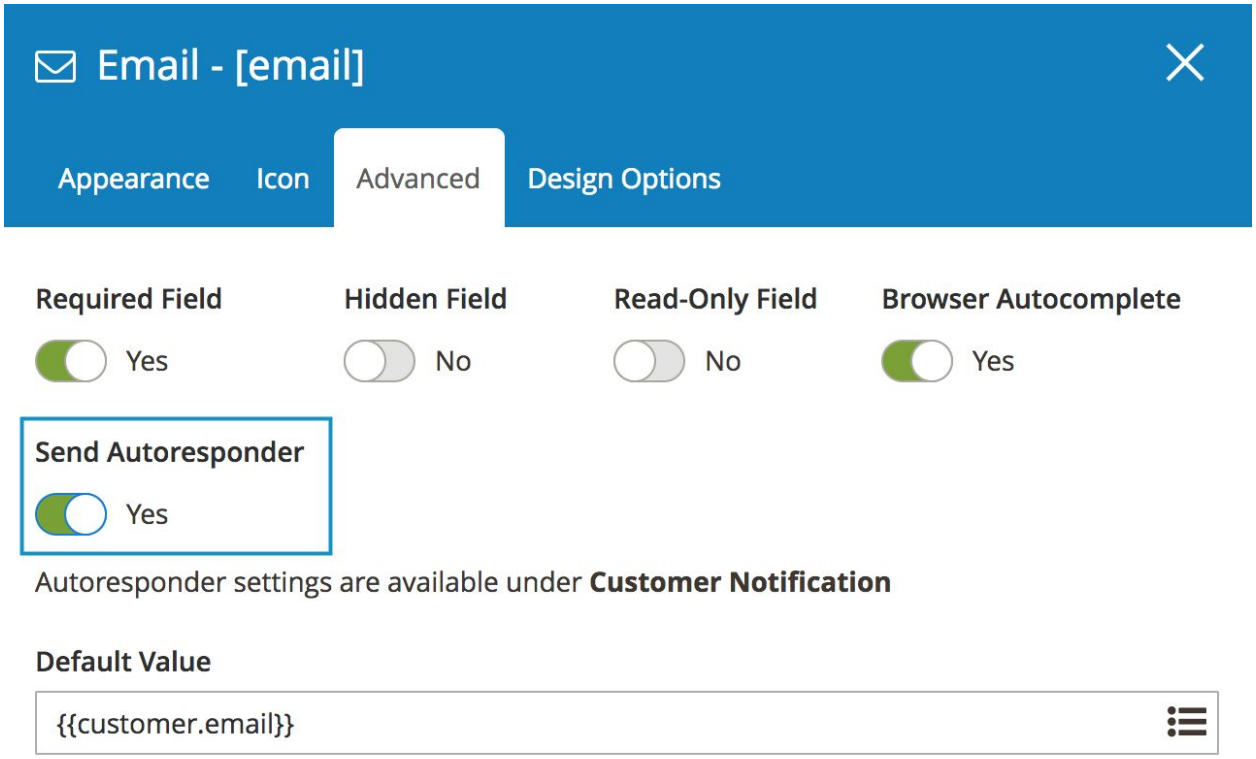
4.1.2 Paragraph

Input number of rows for textarea



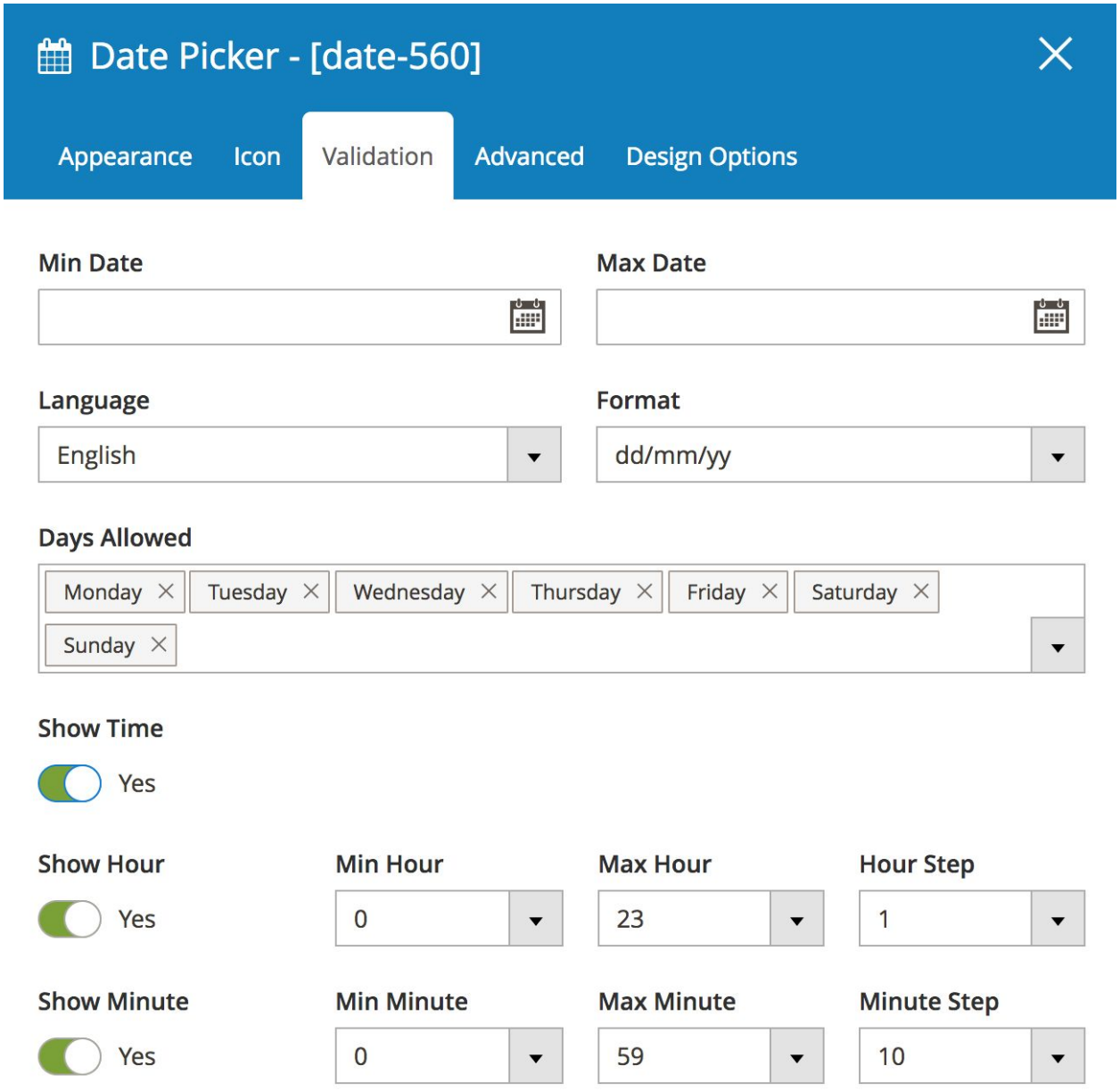
4.1.3 Email

Enable/Disable Send Autoresponder: If customers make registration or finish filling a form, they will get a thank you letter of subscription or notification

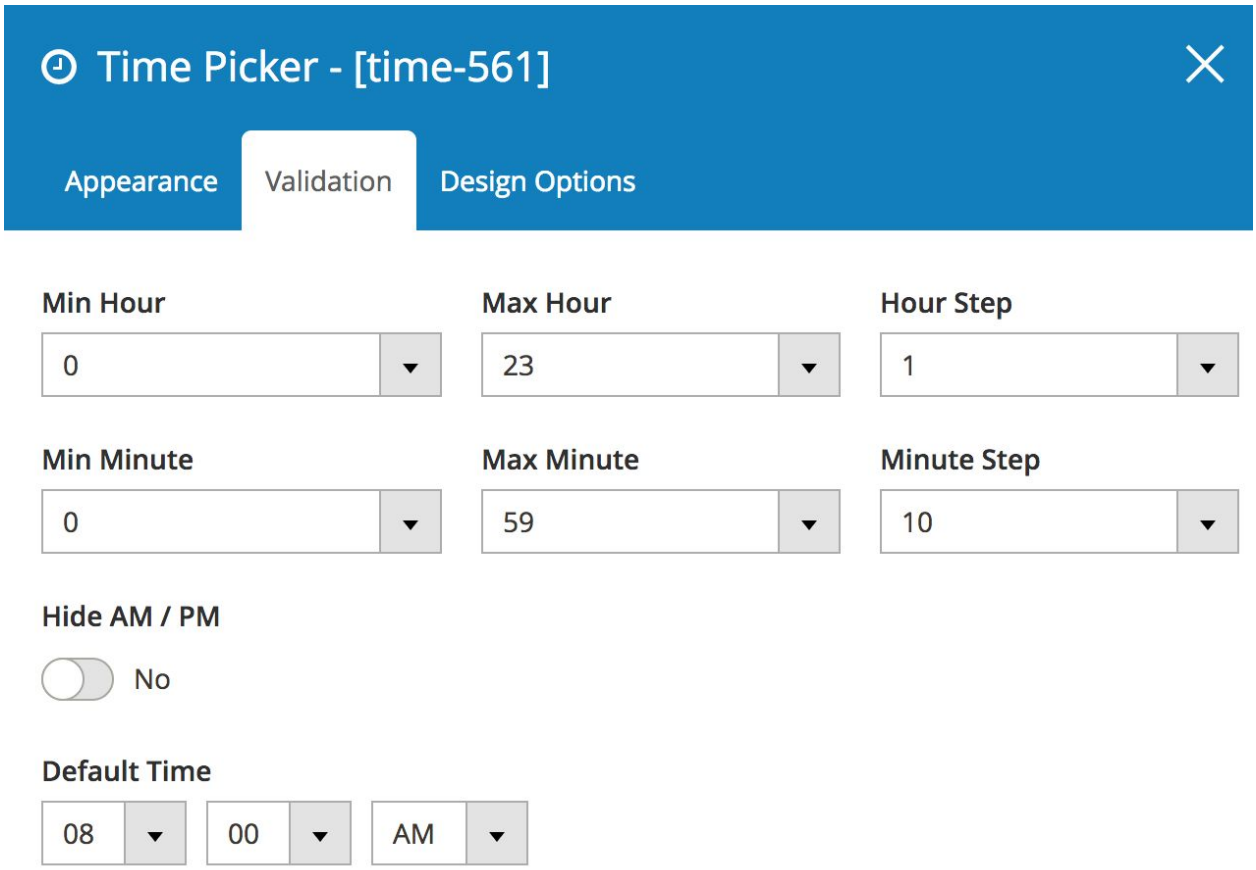


4.1.4 Date Picker

Min Date/ Max date: insert icon validation time

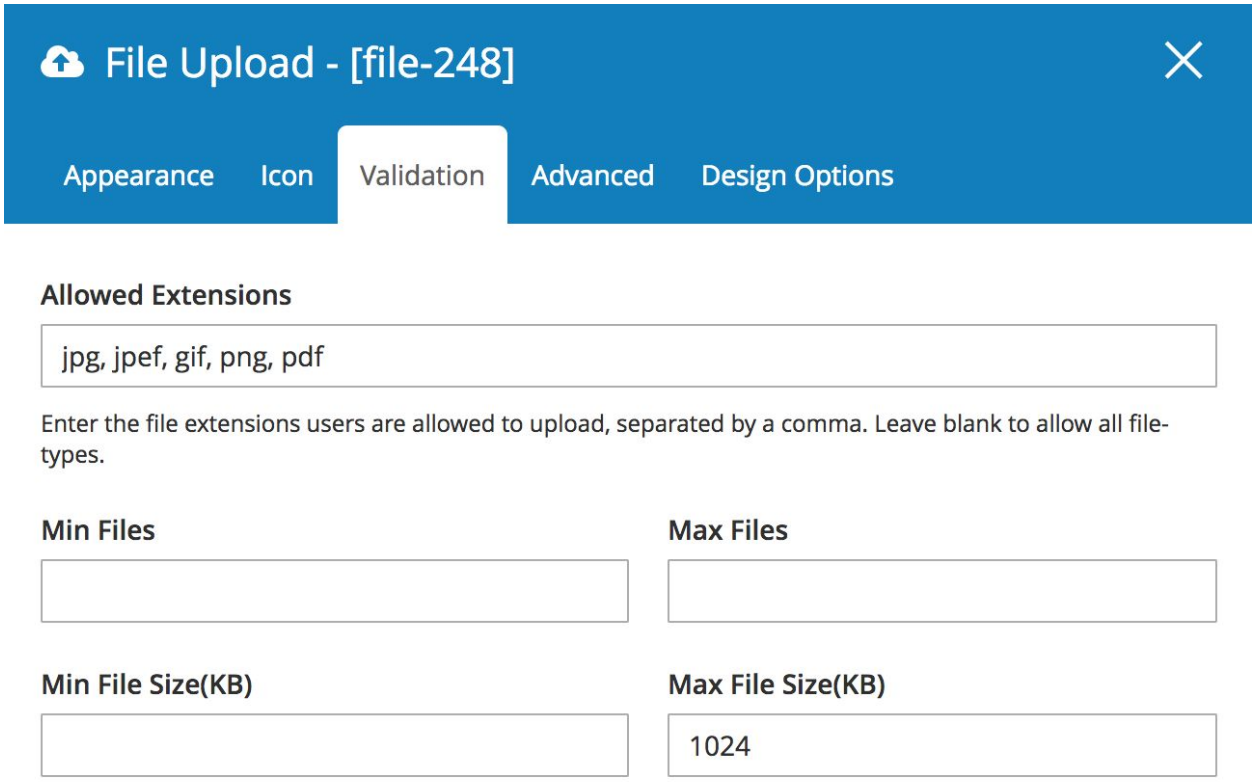


4.1.5 Time picker

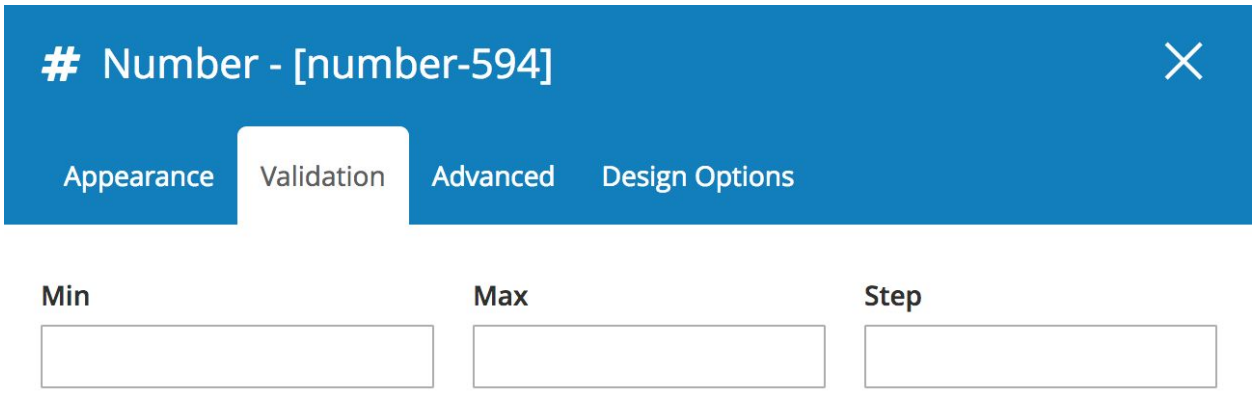


4.1.6 File Upload

- Limit File quantity in **Min/Max Files**
- Limit File size in **Min/Max File Size**
- Control file upload type in **Allow extension**


File Upload - [file-248]
Appearance
Icon
Validation
Advanced
Design Options
Allowed Extensions
jpg, jpef, gif, png, pdf
Enter the file extensions users are allowed to upload, separated by a comma. Leave blank to allow all file-types.
Min Files
Max Files
Min File Size(KB)
Max File Size(KB)
1024

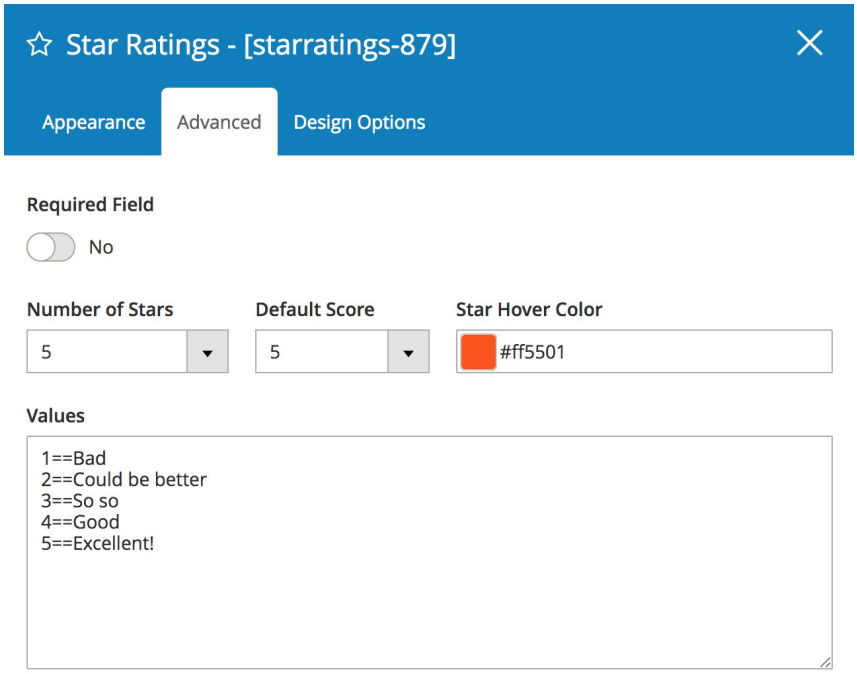
4.1.7 Number


Number - [number-594]
Appearance
Validation
Advanced
Design Options
Min
Max
Step

4.1.8 Star Ratings

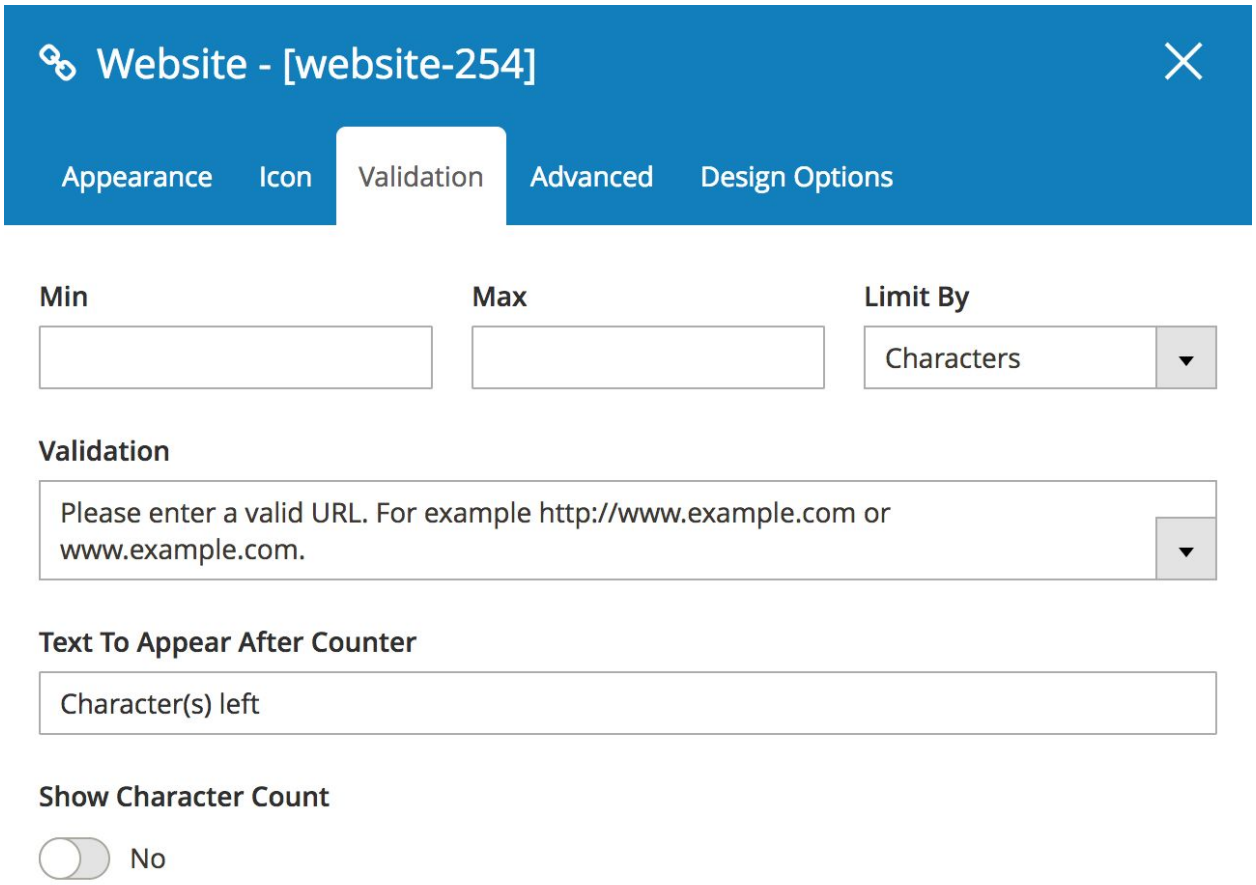
Star Rating gives an overall rating on the quality and performance of what you put in the form.

Add more details on Values to describe each star rating, example:



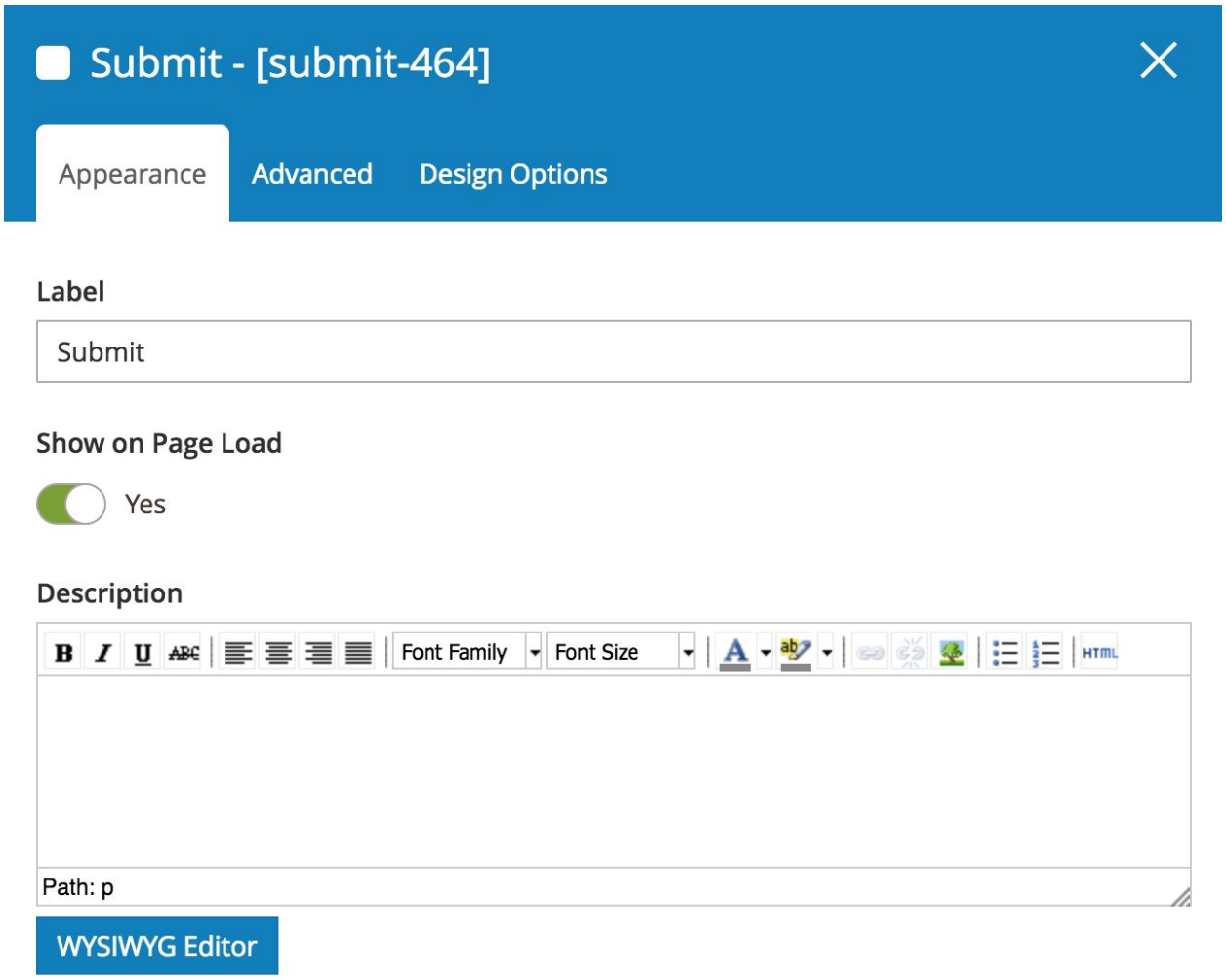
4.1.9 Website

This is where to attach website link into the form



4.1.10 Submit

This is simply a submit button you can choose to display on front page or not. After finish filling the form, customer will click this button to submit.

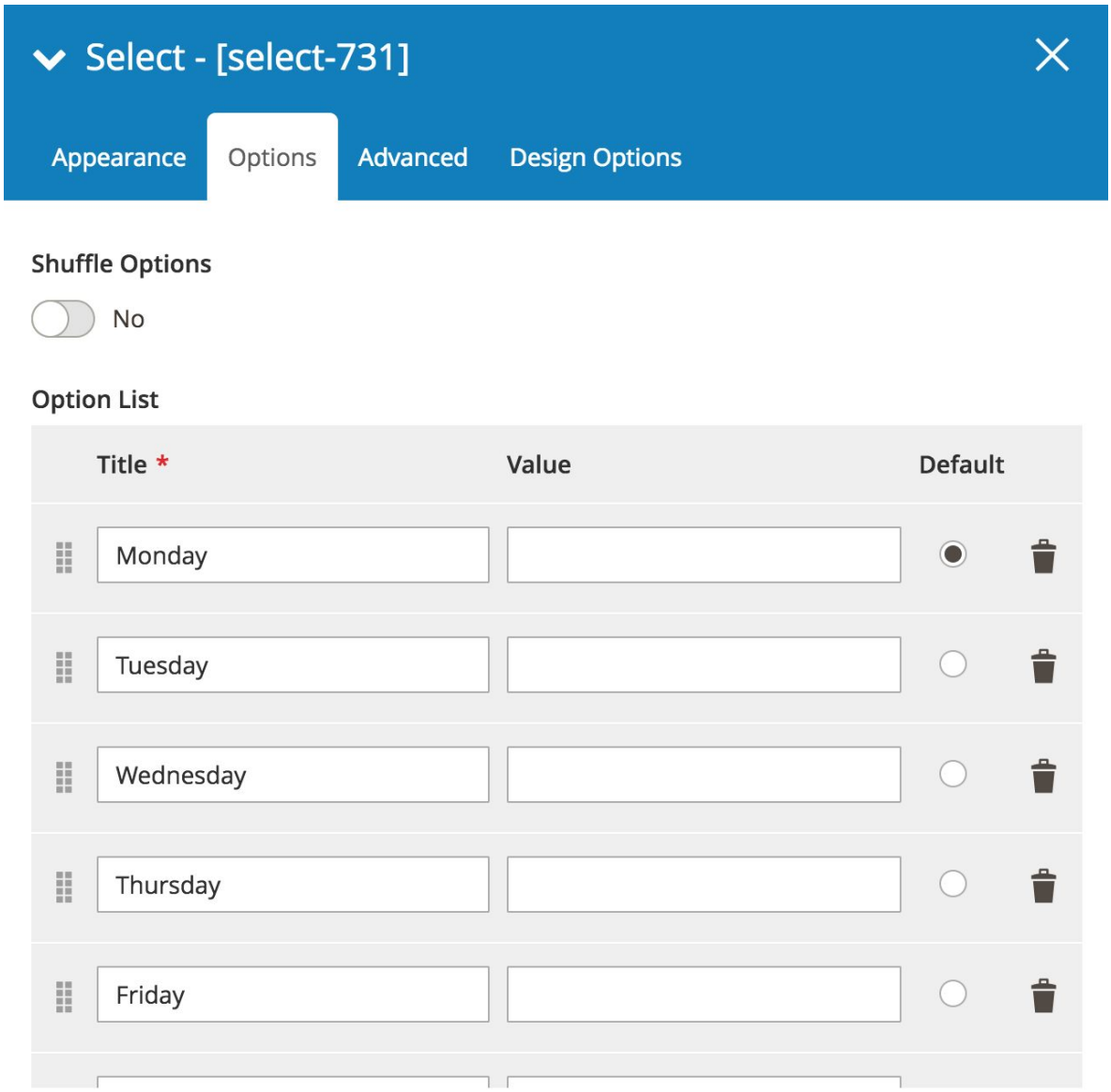


4.2 Multiple Choice Elements

This element can enable your web form to allow Multiple Choice input. There are 5 kinds of Multiple Choice Elements which will meet your need in getting customer's information.

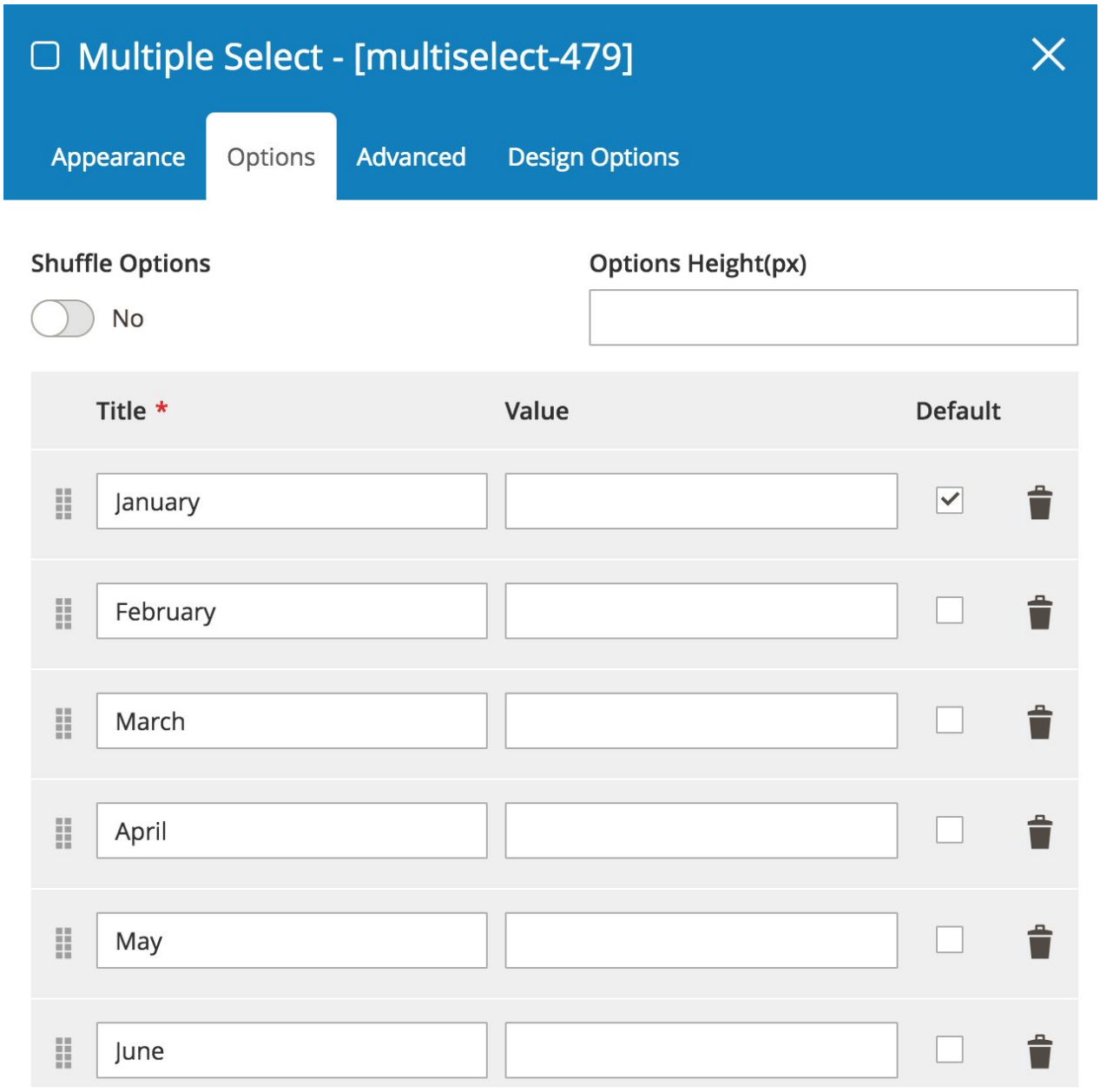
4.2.1 Select

- **Title:** a require field you need to fill in
- **Value:** describe the options
- You can move the options by drag and drop movement
- Enable/ Disable Default mode and Shuffle Options
- Delete option by clicking the recycle bin icon



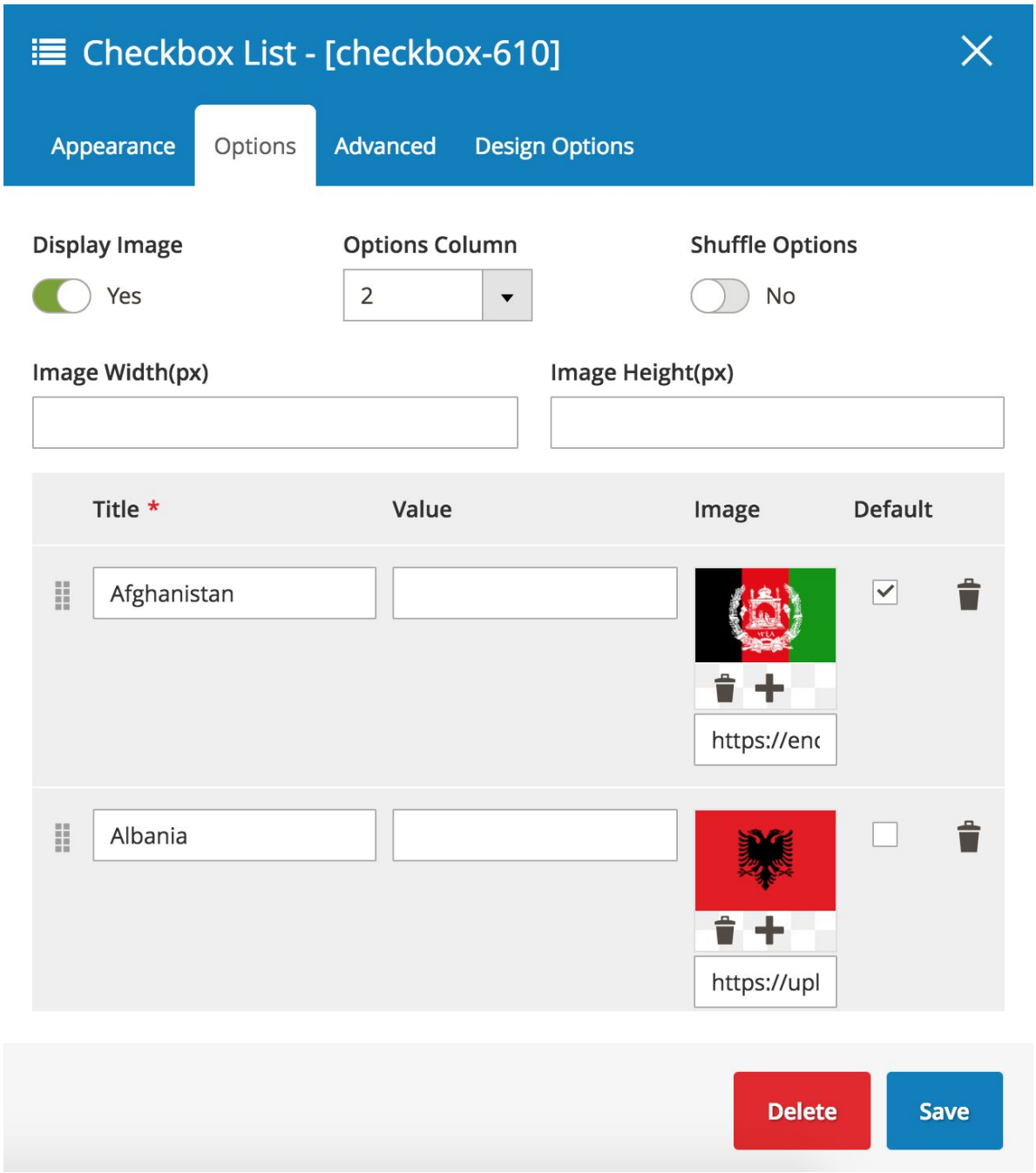
4.2.2 Multiple Select

In multiple select, customer can select more than one option.



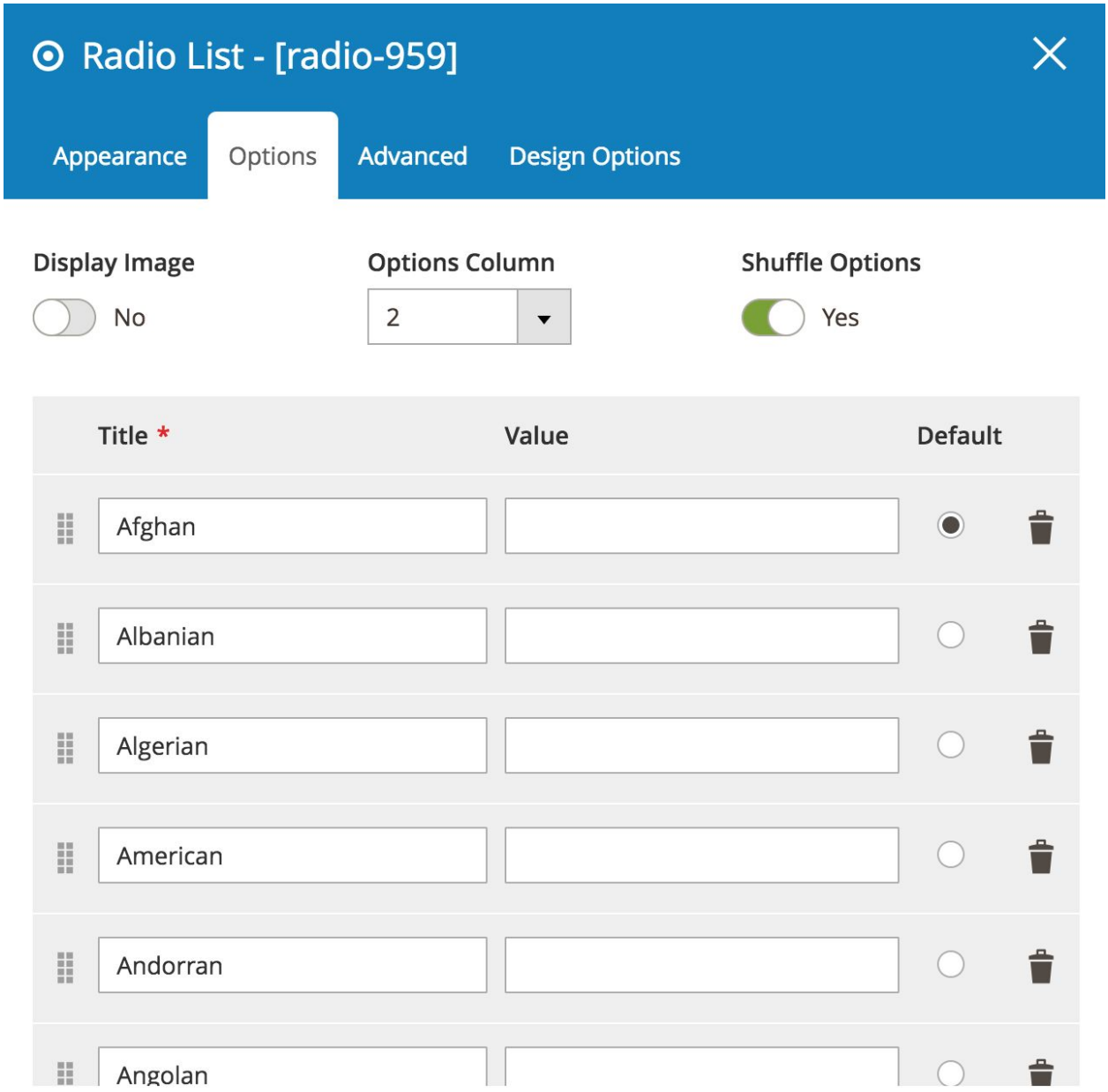
4.2.3 Checkbox List

- Select field presented as a group of checkboxes allowing multiple selection.
- By turning on **Display Image** function, you are enable to add image to represent the options in checkbox list.



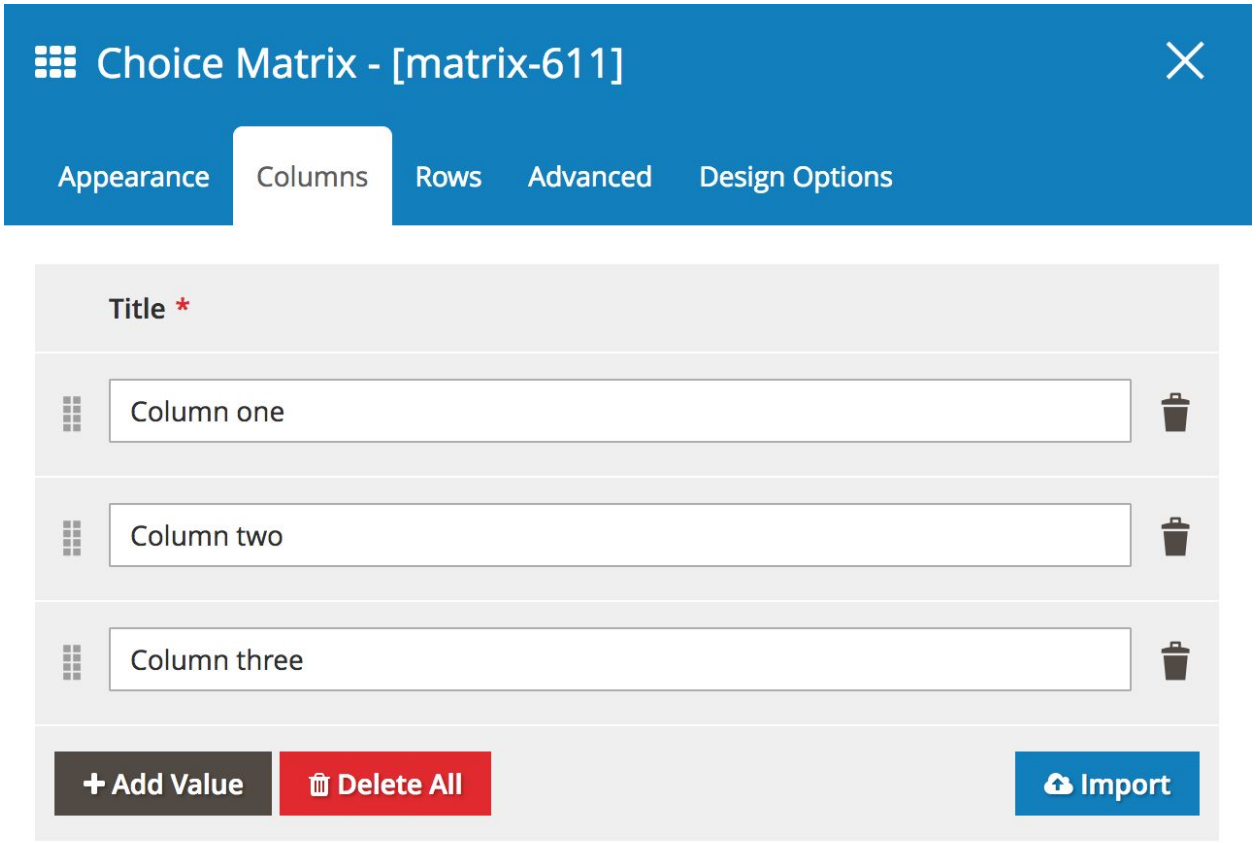
4.2.4 Radio List

Select field presented as a group of radios.



4.2.5 Choice Matrix

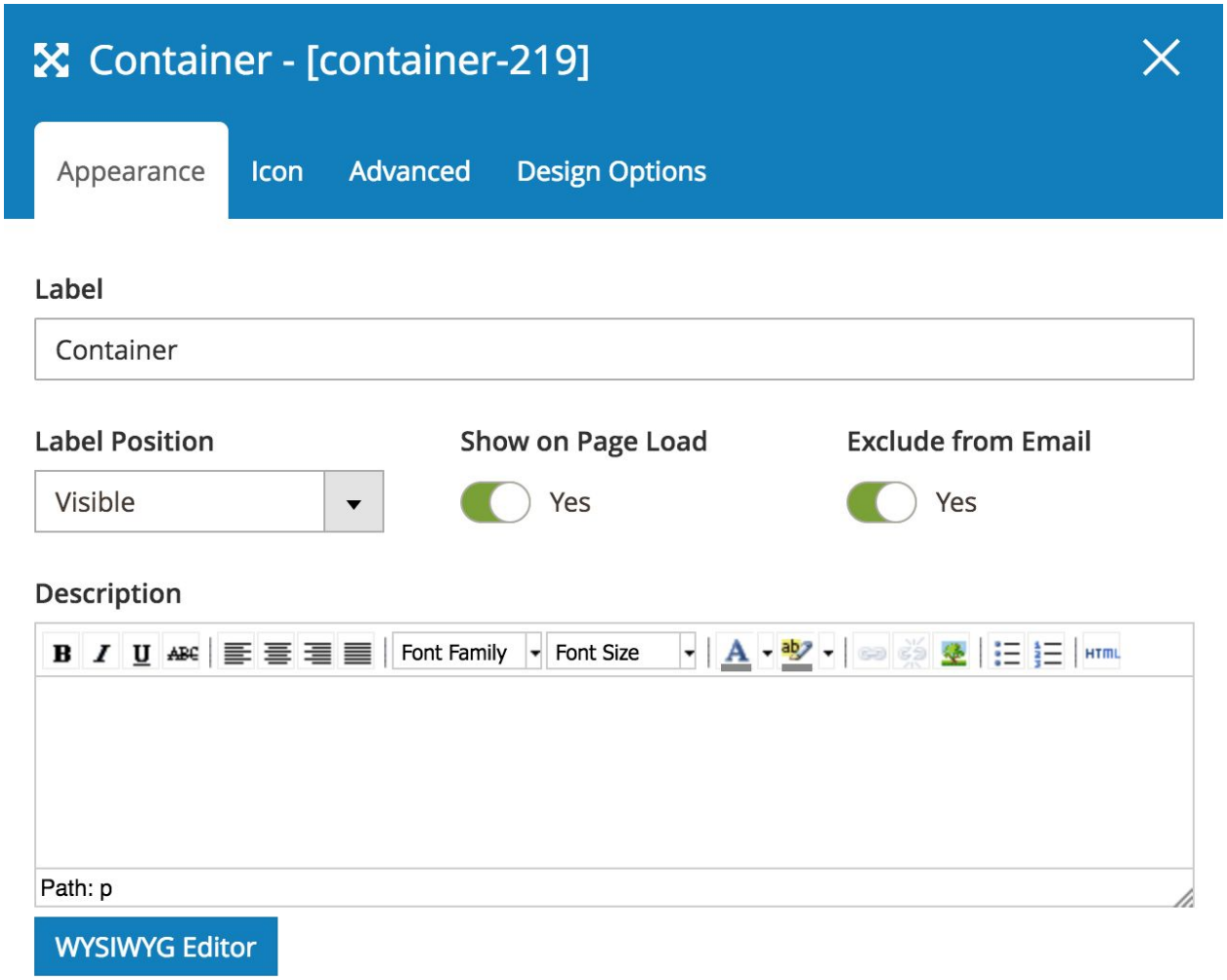
The Choice Matrix requires customers to evaluate one or more row items using a set of column options.



4.3 Layout Elements

4.3.1 Container

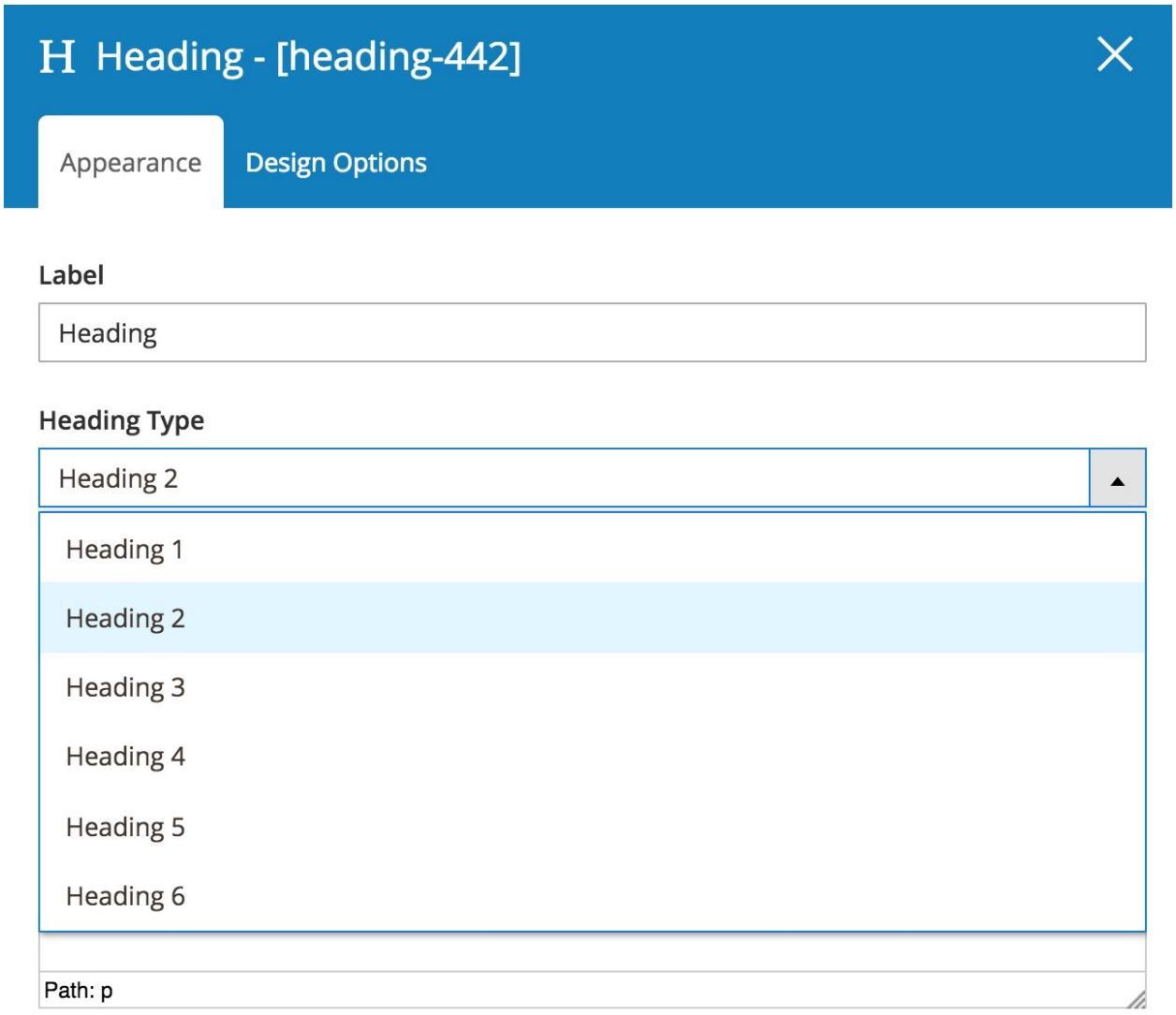
- Label Position: Visible/Hidden
- Show on page load/ Hidden from page load
- Enable/ Disable exclude from Email



4.3.2 Heading

The Heading tab components can be used to add content headings to the form.

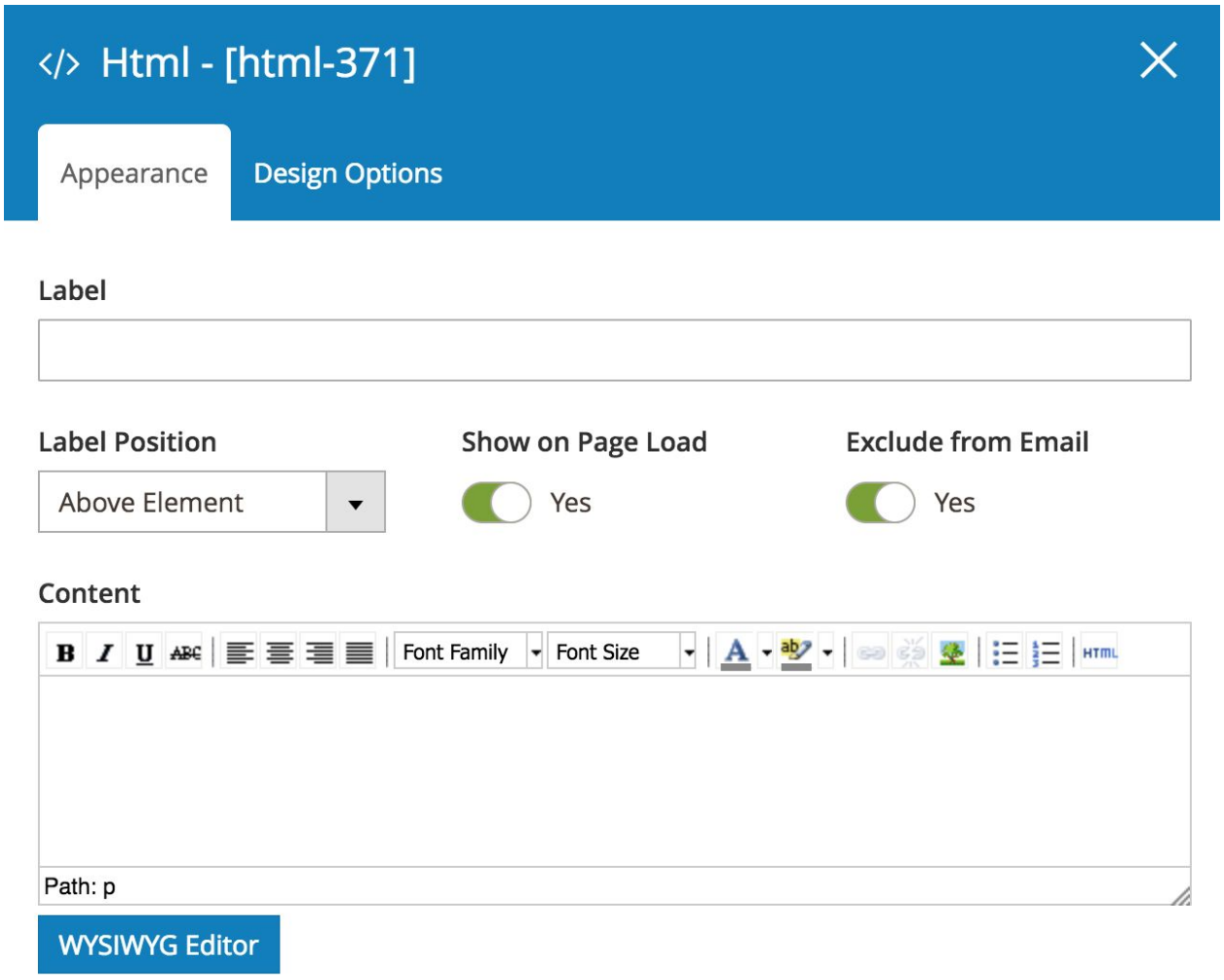
- Customize heading by changing Label
- 6 types of Heading to choose: H1, H2, H3, H4, H5, H6



4.3.3 Html

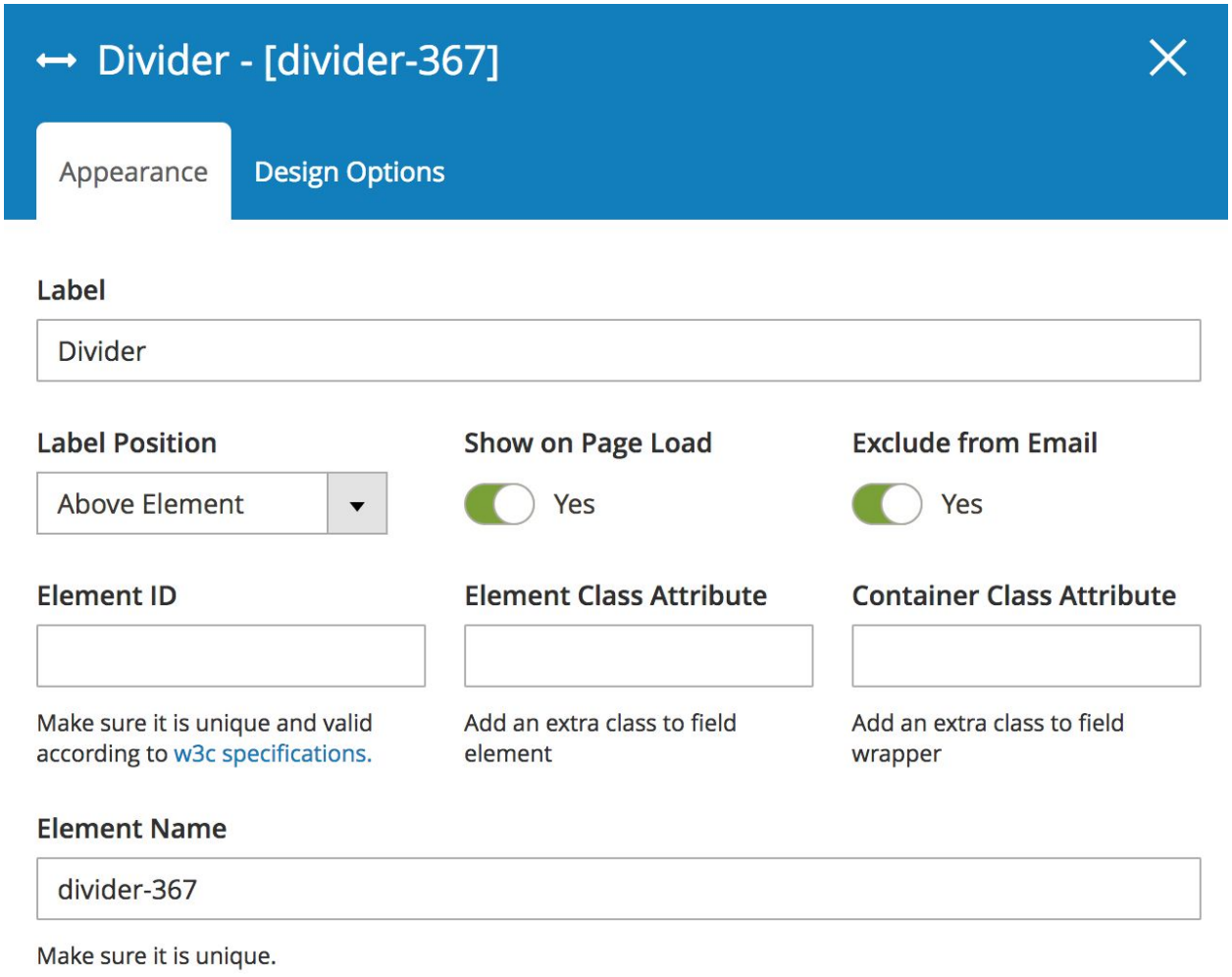
The HTML element allows you to enter practically any HTML code you wish to include in your form

- Add a label
- Content box: is where you place your HTML code

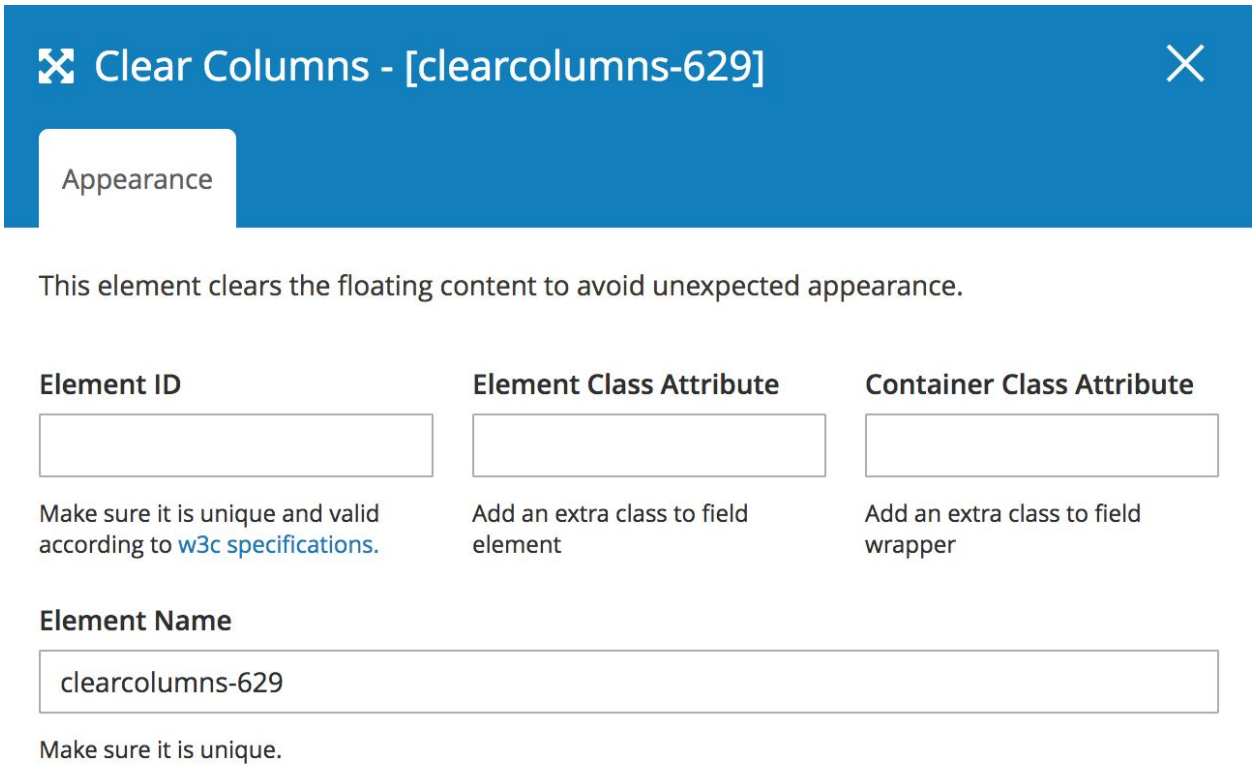


4.3.4 Divider

- A tool to divide the elements in a form
- Make sure you insert an unique Element ID



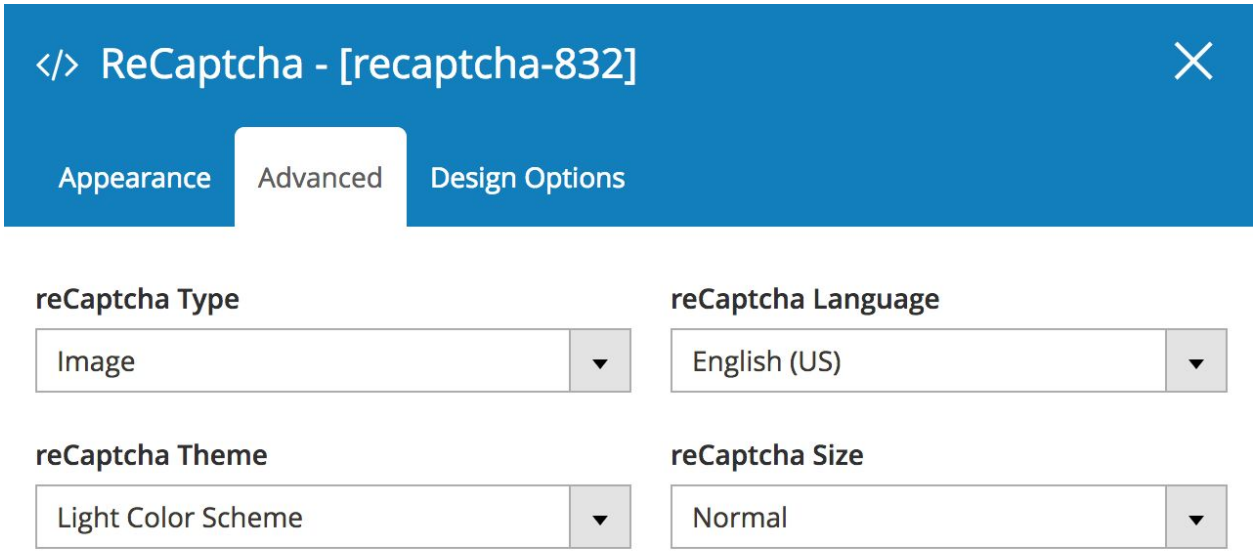
4.3.5 Clear columns



4.4 Other & Security Elements

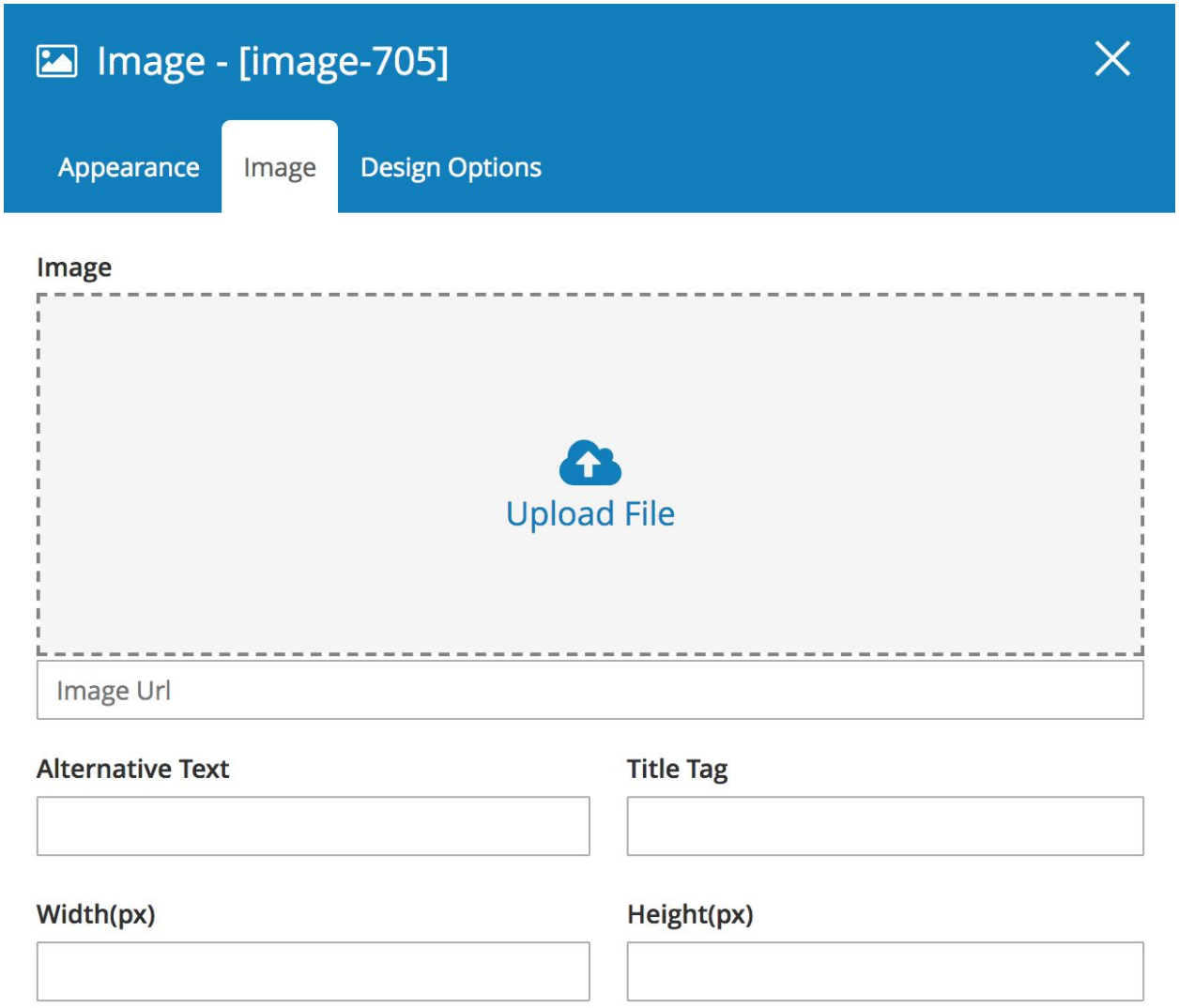
4.4.1 ReCaptcha

- **reCaptcha Type:**
  - Image
  - Audio
- **reCaptcha Language:**
  - Various language to choose from
- **reCaptcha Theme:**
  - Light/Dark color scheme
- **reCaptcha Size:**
  - Normal
  - Compact



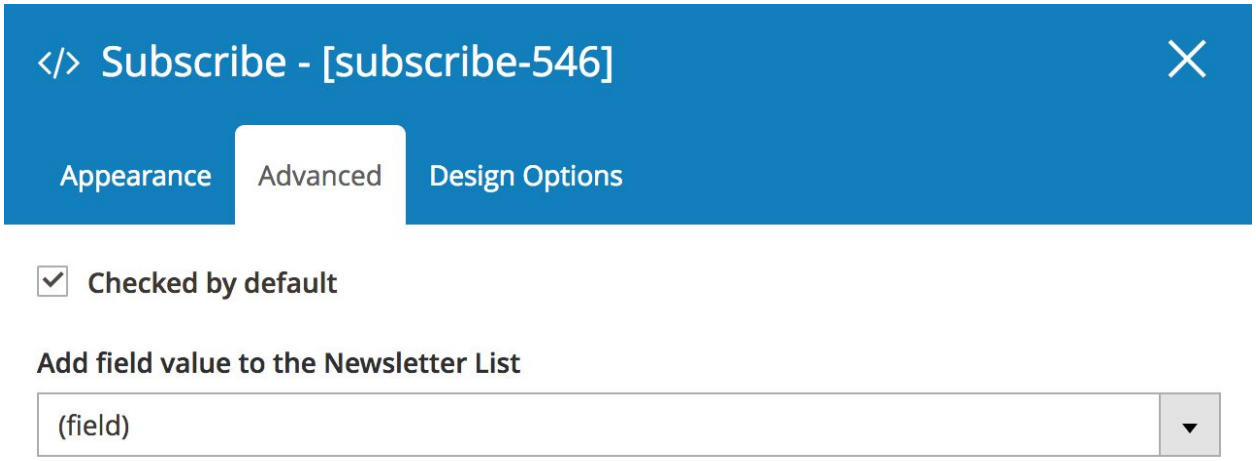
4.4.2 Image

- Click Upload file or insert Image URL link to add image
- Add image's name in Title and description in Alternative Text
- Adjust image's size with Width and Height

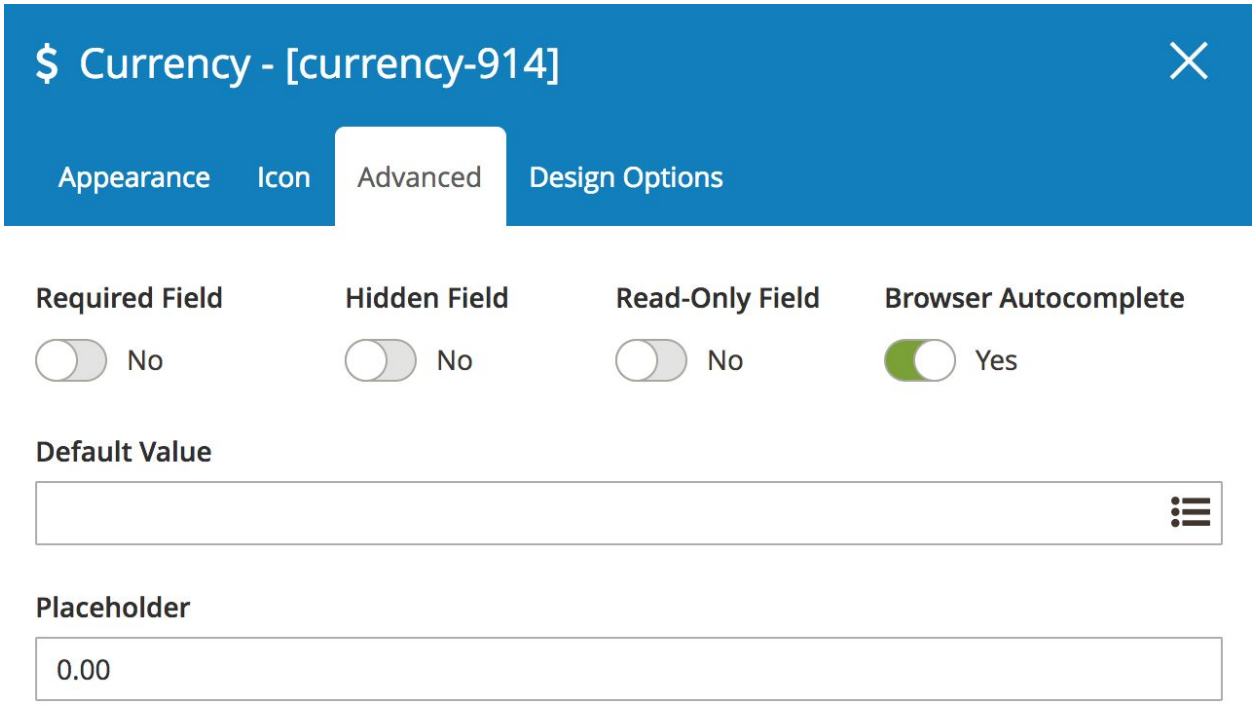


4.4.3 Subscribe

Creat a Subcribe button for customer to keep in touch with your page



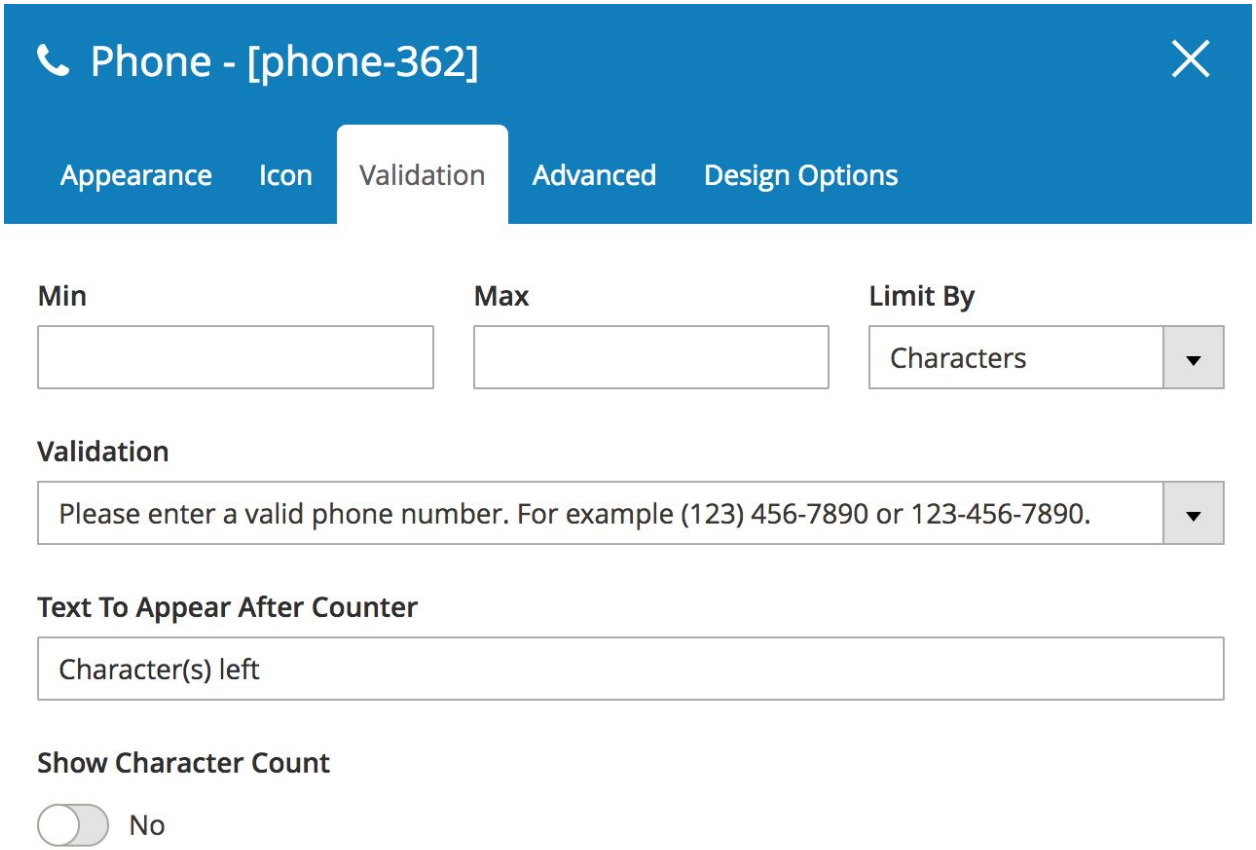
4.4.4 Currency



4.4.5 Phone

This is the field where customers enter their phone numbers

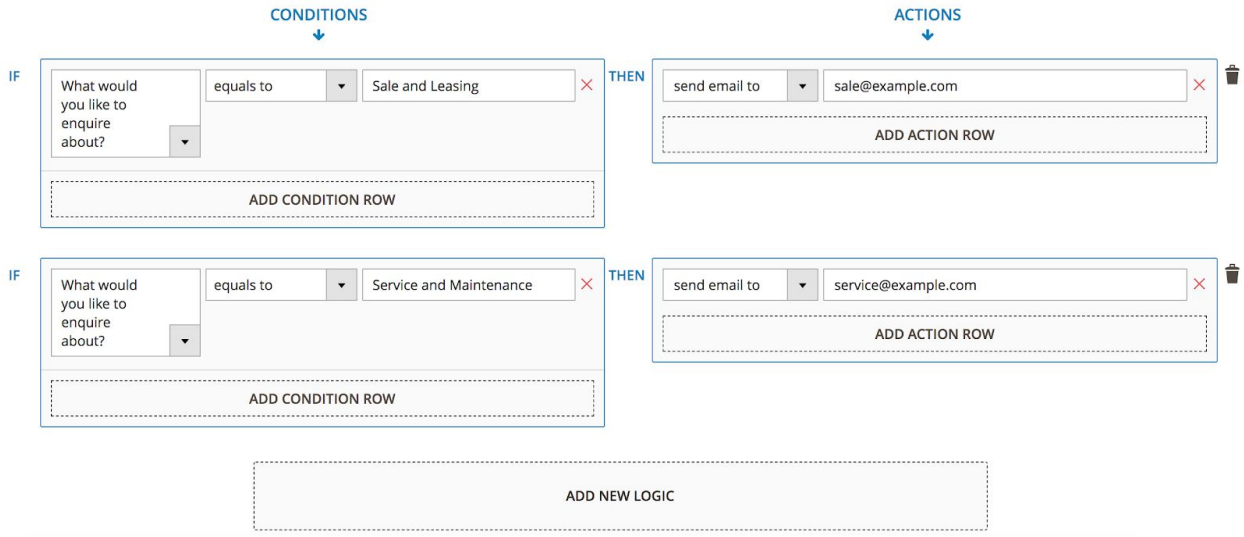
- Insert characters or words limitation
- Select one from Validation, recommend choosing one like this example
- Customize text to appear after counter
- Enable/Disable Character Count



5) Conditional Form Fields

In the Conditional Form Fields, you can make any of the form components that have been added to the form conditional, meaning that the form component only appears on the front-end under specified conditions.

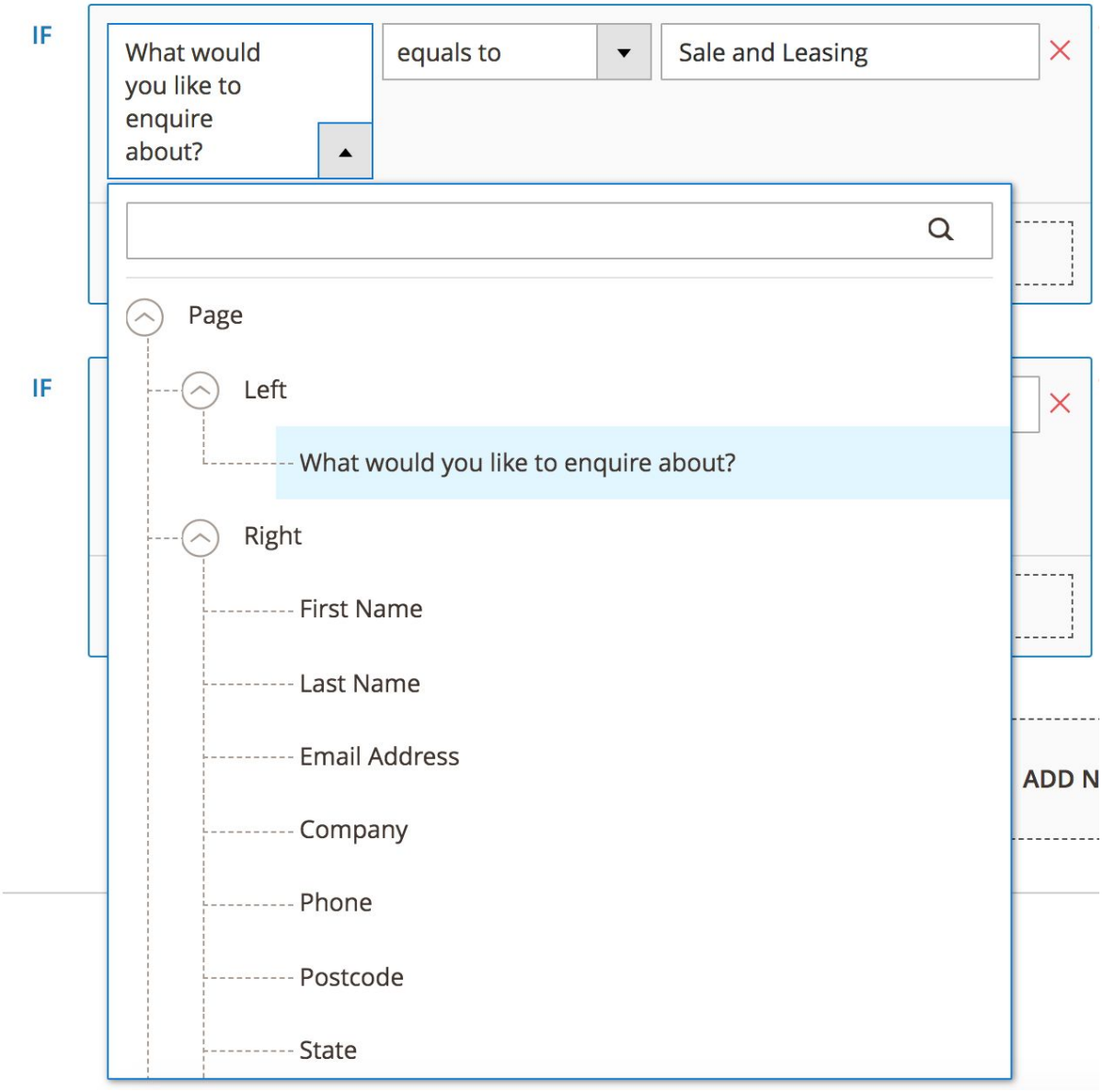
Navigate to Content -> Add New Form -> Conditional Form Fields



Add more conditional logic by clicking Add new logic

Delete a conditional form field by clicking the recycle bin icon

Click the field button to choose which component should be made conditional



To configure the condition you can choose whether form field should:

- equals to
- not equals to
- greater than
- less than
- contains
- does not contain

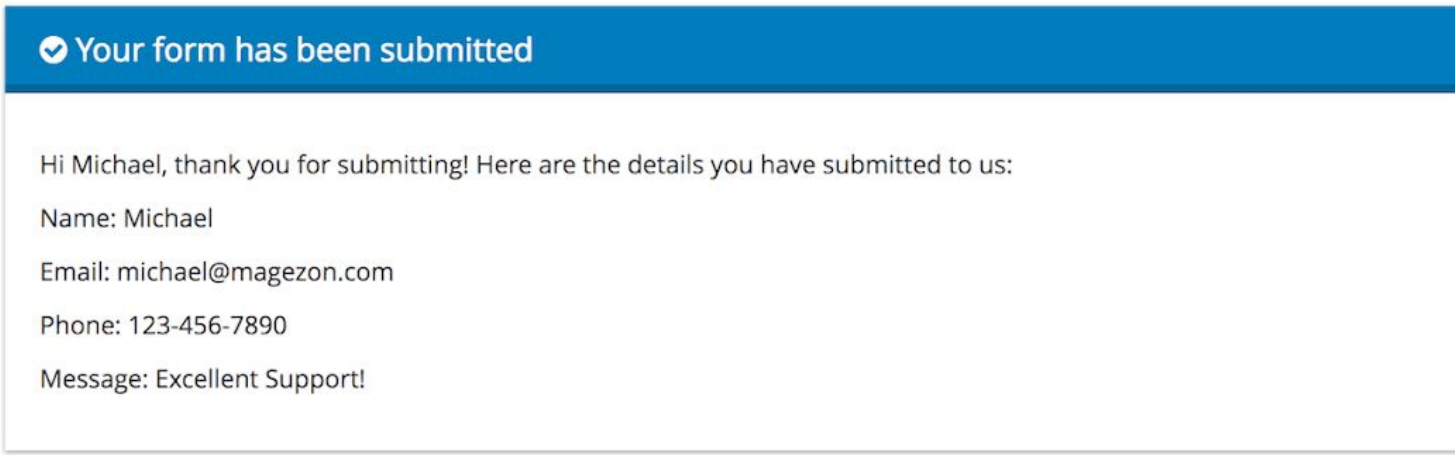
- starts with
- ends with

Choose the action that will happen if the condition is valid

- show fields
- hide fields
- send email to
- redirect to
- set values of

6) Success Message

After submitting a form, customer will receive a message like this:



Customize the text that will be shown to store visitors after submitting the form. You can customize message by using these custom variables:

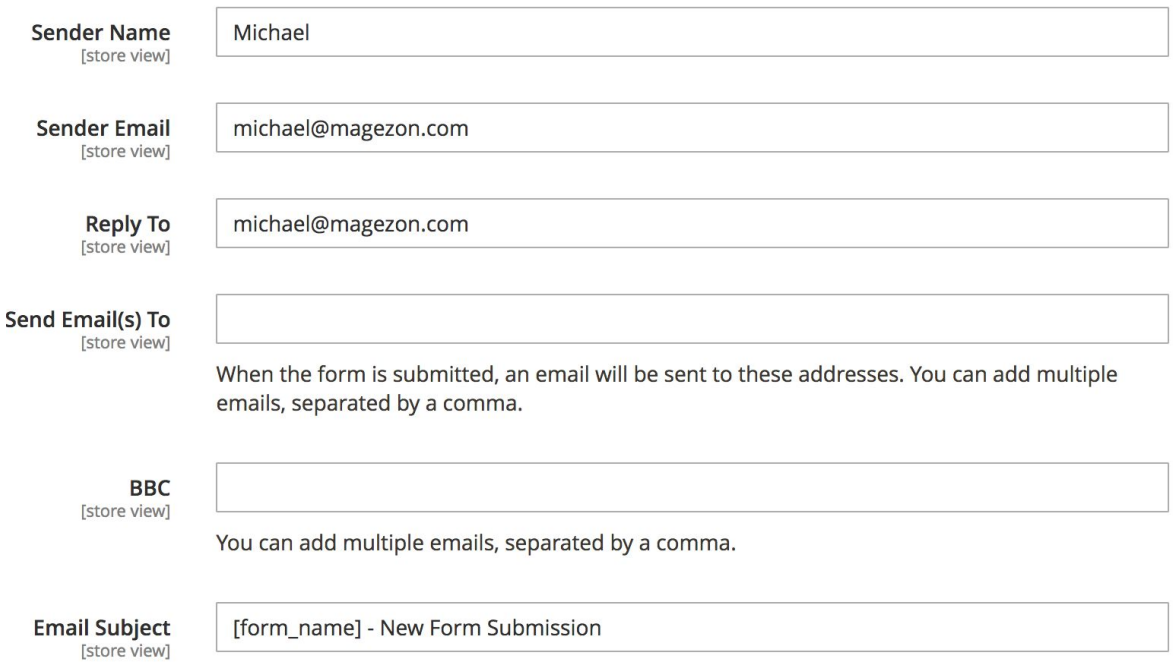
- [ELEMENT_NAME] - Element name
- [form_id] - Form ID
- [form_name] - Form Name
- [form_url] - Form Url

- [submission_id] - Submission ID
- [submission_date] - Submission Date
- [submission_content] - Submission Content
- [submit_from_page] - Submit from Page
- [visitor_id] - Visitor IP

7) Admin Notification

Blue Form Builder allows you to send email notifications to a group of recipients, on each successful form submission.

You can add multiple emails, separated by commas. **Email Subject** and **Email Body** allow you to edit the content of this notification email's subject, and body, respectively.

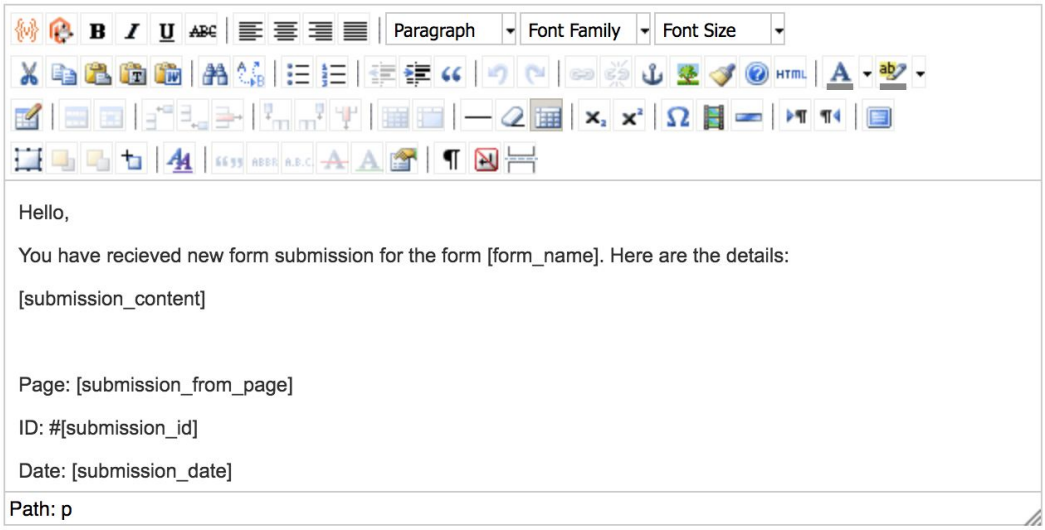


You can customize **Email Body** by using these custom variables:

- [ELEMENT_NAME] - Element name
- [form_id] - Form ID
- [form_name] - Form Name
- [form_url] - Form Url
- [submission_id] - Submission ID
- [submission_date] - Submission Date
- [submission_content] - Submission Content
- [submit_from_page] - Submit from Page
- [visitor_id] - Visitor IP

Email Body
[store view]

Show / Hide Editor



8) Customer Notification

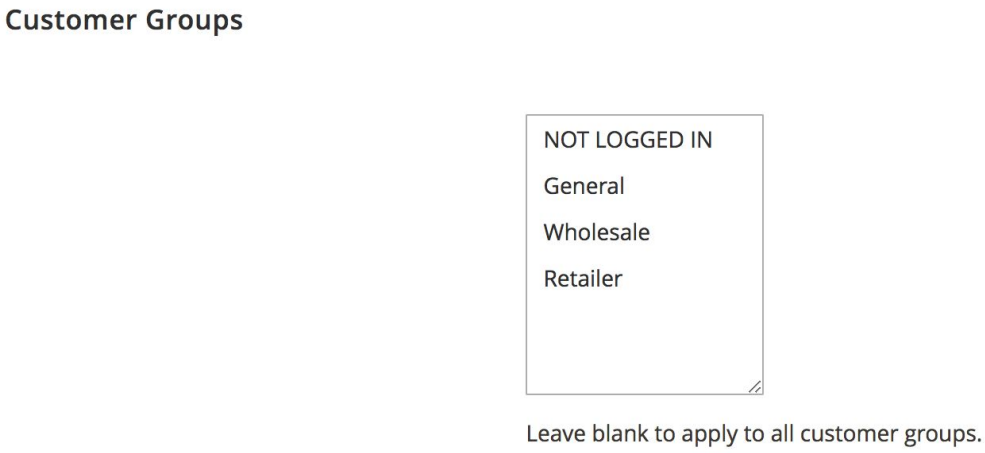
Blue Form Builder allows you to send autoresponders (or thank-you emails) to users who fill the form. First, add an email field to your form. Click on the field to edit it, and check the option **Send Autoresponder**.

You can customize **Email Body** by using these custom variables:

- [ELEMENT_NAME] - Element name
- [form_id] - Form ID
- [form_name] - Form Name
- [form_url] - Form Url
- [submission_id] - Submission ID
- [submission_date] - Submission Date
- [submission_content] - Submission Content
- [submit_from_page] - Submit from Page
- [visitor_id] - Visitor IP

9) Customer Groups

Select customer groups for which the custom form will be available. Leave blank to apply to all customer groups.



10) Styling

This function gives you various options to design a form

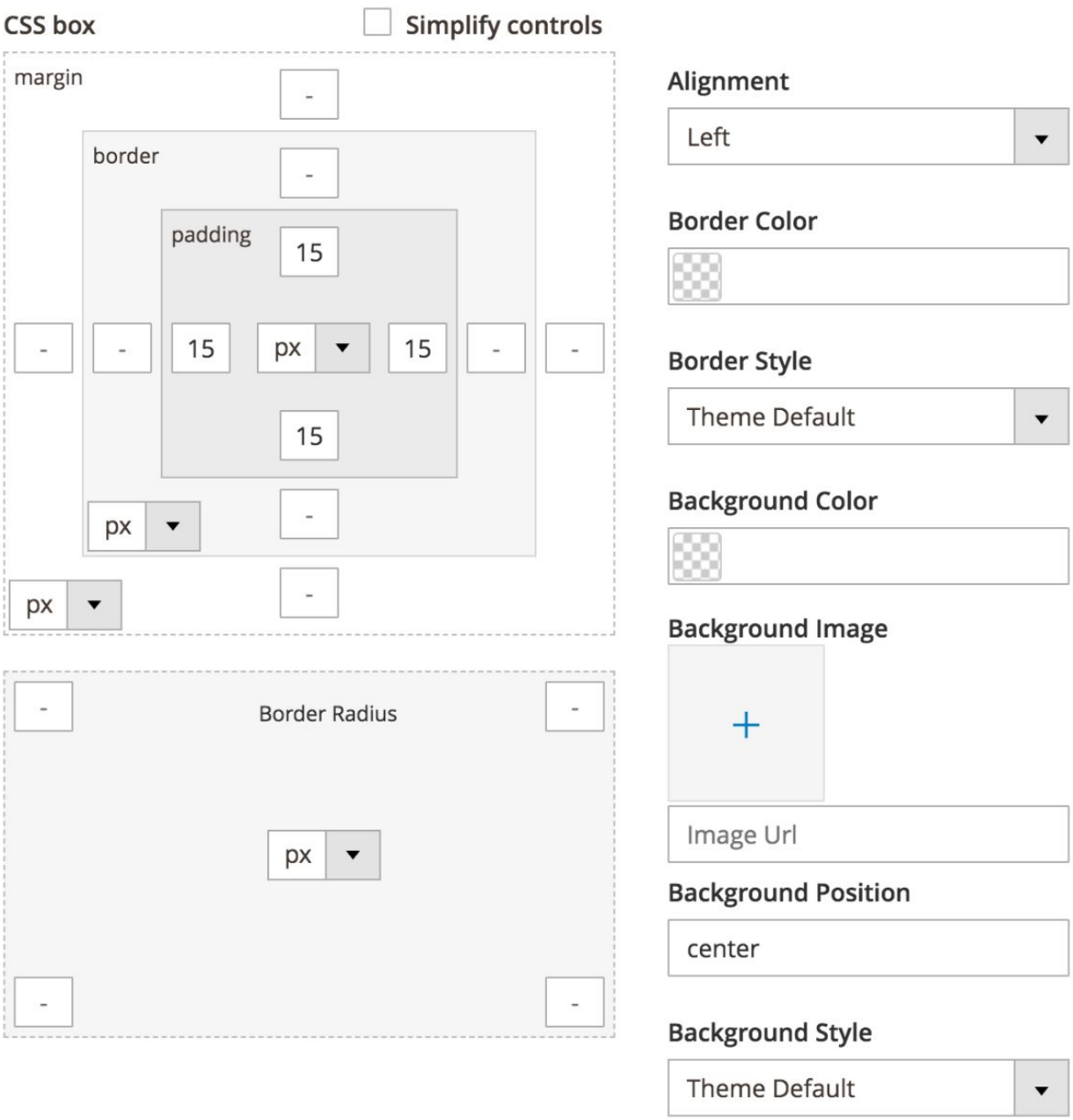
Tick **Simply Controls** to apply the same customized size onto the form's width and length (top, bottom, left, right).

Width: width of form.

Border Color/ Background Color: choose a color from the pantone.

Border Style/ Background Style: choose one from the given options.

You can import image by adding URL link in Image URL box or insert image in our store.


CSS box
Simplify controls
margin
border
padding
15
15
px
15
15
px
px
Border Radius
px
Alignment
Left
Border Color
Border Style
Theme Default
Background Color
Background Image
Image Url
Background Position
center
Background Style
Theme Default

11) Search Engine Optimization

Search engine optimization (SEO) helps increase the quantity and quality of traffic to your website through organic search engine results.

URL Key: insert the link to your form

Meta Title: add title tags which contain important keywords to help the search engine determine what the page is about

Meta Description: add a short paragraph of text placed in the HTML of your webpage that describes its content

Meta Keywords: add some keywords related to your page

12) Advanced

Enable Form: Form status

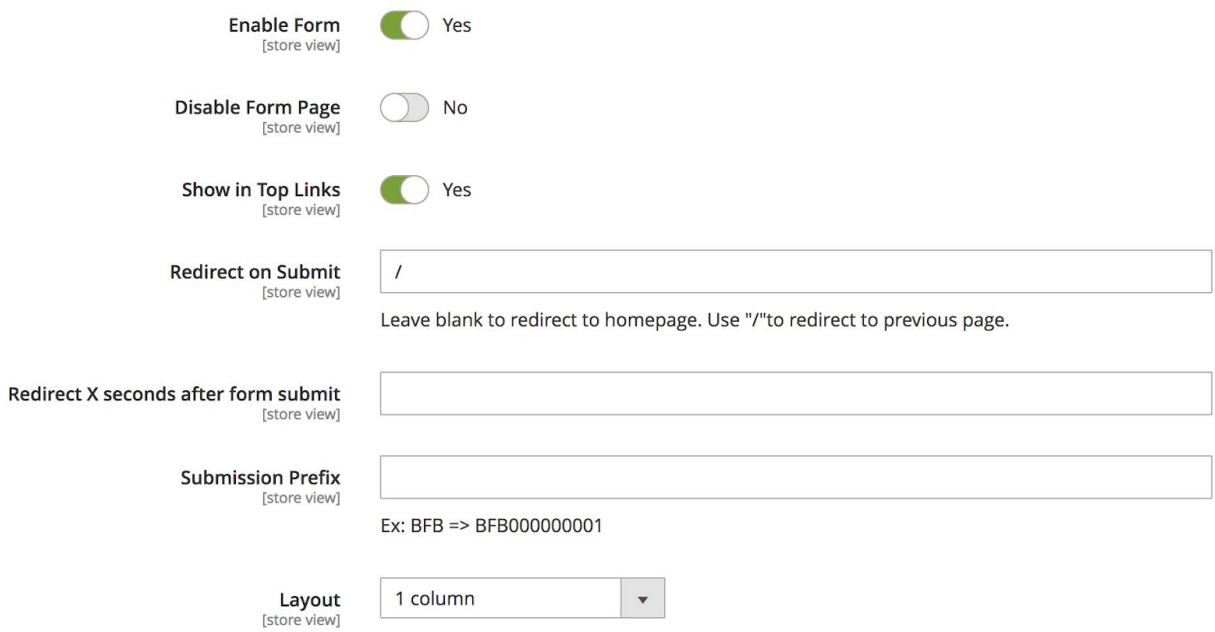
Disable Form Page: Disable form detailed page. In case you insert form in another page such as CMS Page, Static Block

Show in Top Links: Insert link to form in the top links

Redirect on Submit: Leave the field empty to redirect customers to the home page or use “/” to enable redirect to the previous page.

Submission Prefix: you can decide which form will be attached to an specify prefix. For example: SF for Survey Form, CF for Contact Form

Layout: select column display



V) Manage Submissions

The extension allows to manage submissions either in backend by admin or on frontend by customers.

1) List of Submissions

ID	Form	Customer Name	Customer Email	IP Address	Store View	Status	Created At	Action
00000005	Customer Satisfaction Survey	Guest		98.182.610.410	Main Website Main Website Store Default Store View	UNREAD	Mar 26, 2018 11:37:43 AM	Select
00000004	Contact Us 3	Guest		51.151.240.391	Main Website Main Website Store Default Store View	READ	Mar 26, 2018 11:36:40 AM	Select
00000003	Book an Appointment	Guest		64.174.150.280	Main Website Main Website Store Default Store View	UNREAD	Mar 26, 2018 11:35:47 AM	Select
00000002	Delivery Feedback	Guest		86.101.103.758	Main Website Main Website Store Default Store View	READ	Mar 26, 2018 11:35:21 AM	Select
00000001	Contact Us	Veronica Costello	roni_cost@example.com	12.120.180.186	Main Website Main Website Store Default Store View	READ	Mar 26, 2018 11:33:56 AM	Select

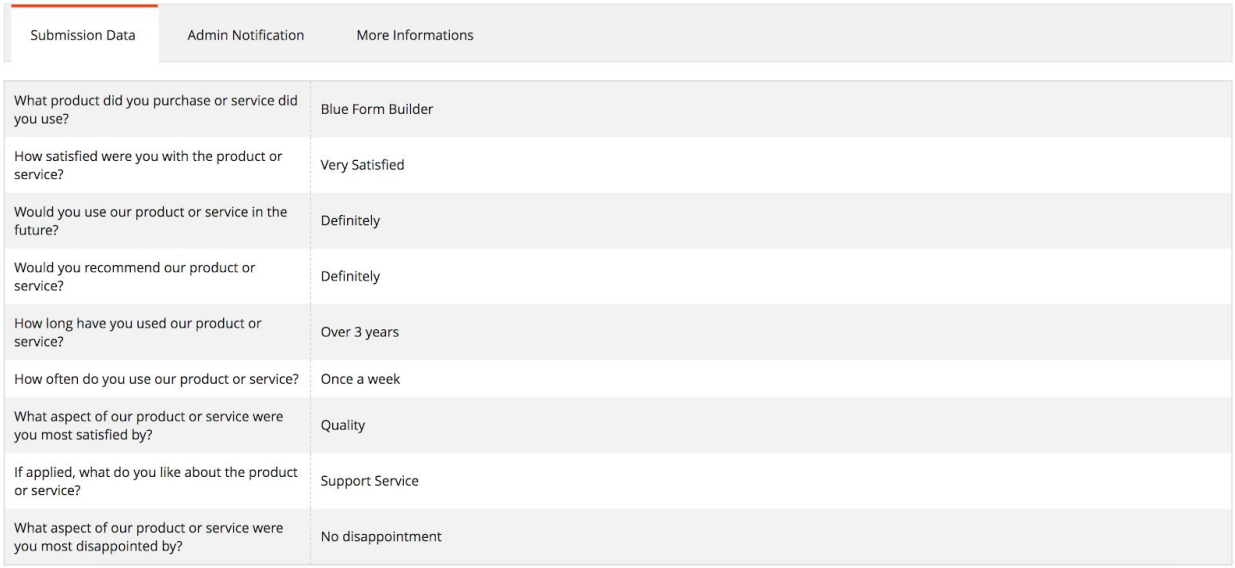
The number of saved submissions for each form can be found in the **Submissions** column on the list of forms which gives you information about the form and customer who submits it.

You can find all submission in **Content > Blue Form Builder > Form Submissions**

The records can be filtered or sorted. You can hide, unhide or reorder columns. Choose the number of number of records per page or navigate through pages.

To export submitted form data to CVS or Excell, you can click Form's name then choose Export Submissions, a file will be automically dowloaded to your device.

2) View Submission

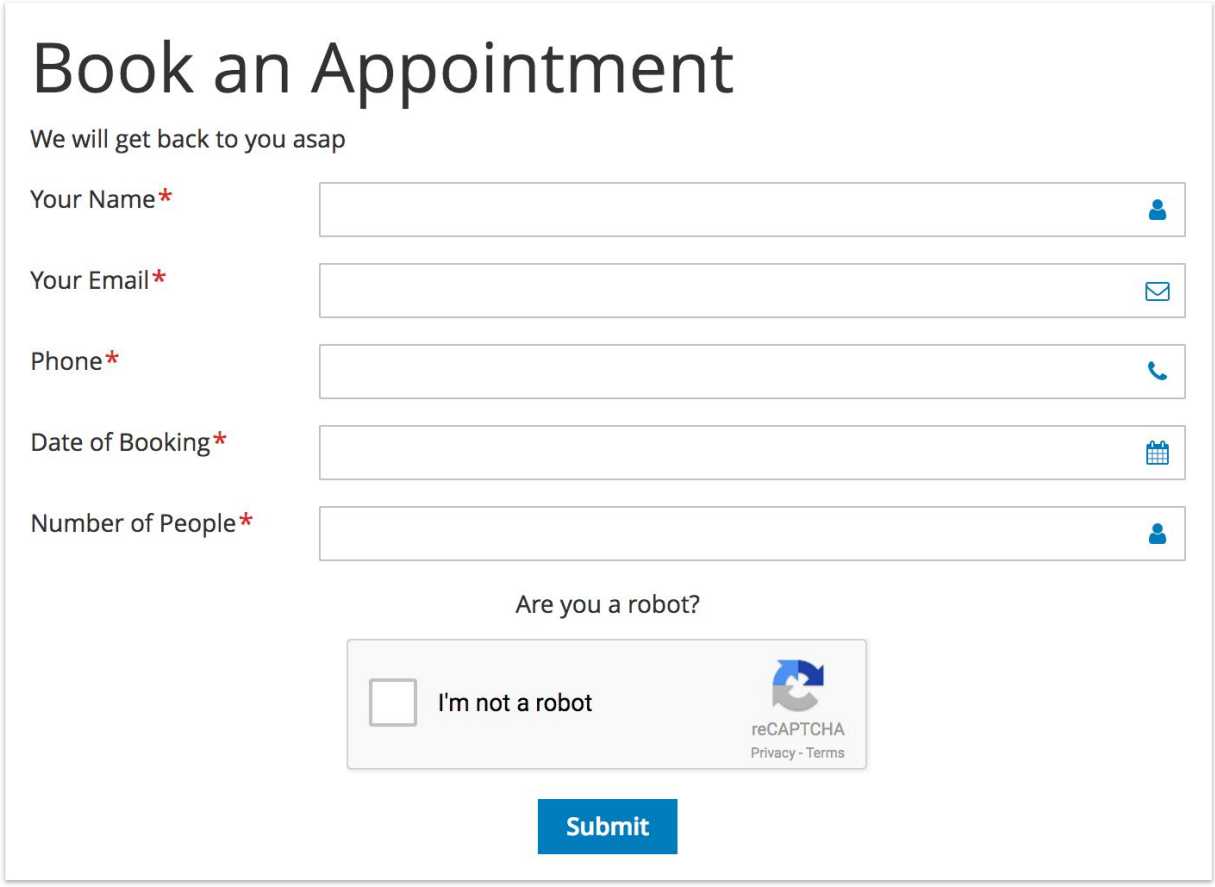


Submission Data | Admin Notification | More Informations

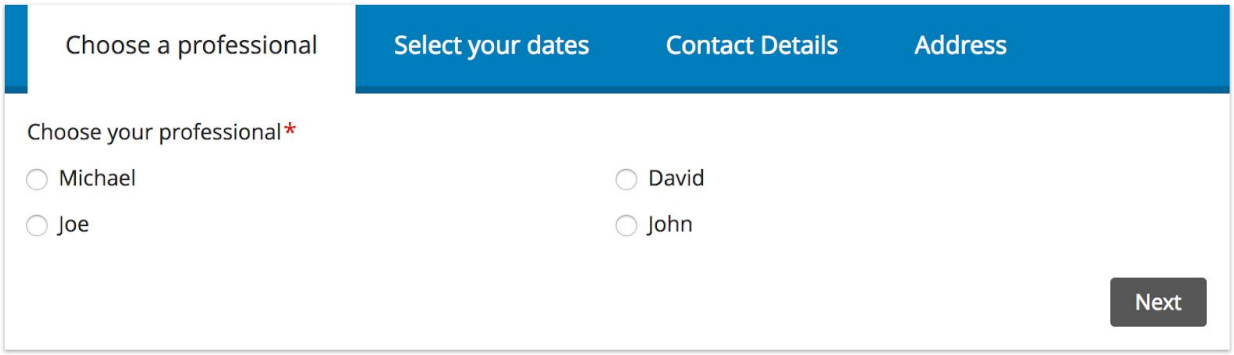
What product did you purchase or service did you use?	Blue Form Builder
How satisfied were you with the product or service?	Very Satisfied
Would you use our product or service in the future?	Definitely
Would you recommend our product or service?	Definitely
How long have you used our product or service?	Over 3 years
How often do you use our product or service?	Once a week
What aspect of our product or service were you most satisfied by?	Quality
If applied, what do you like about the product or service?	Support Service
What aspect of our product or service were you most disappointed by?	No disappointment

VI) Frontend Examples

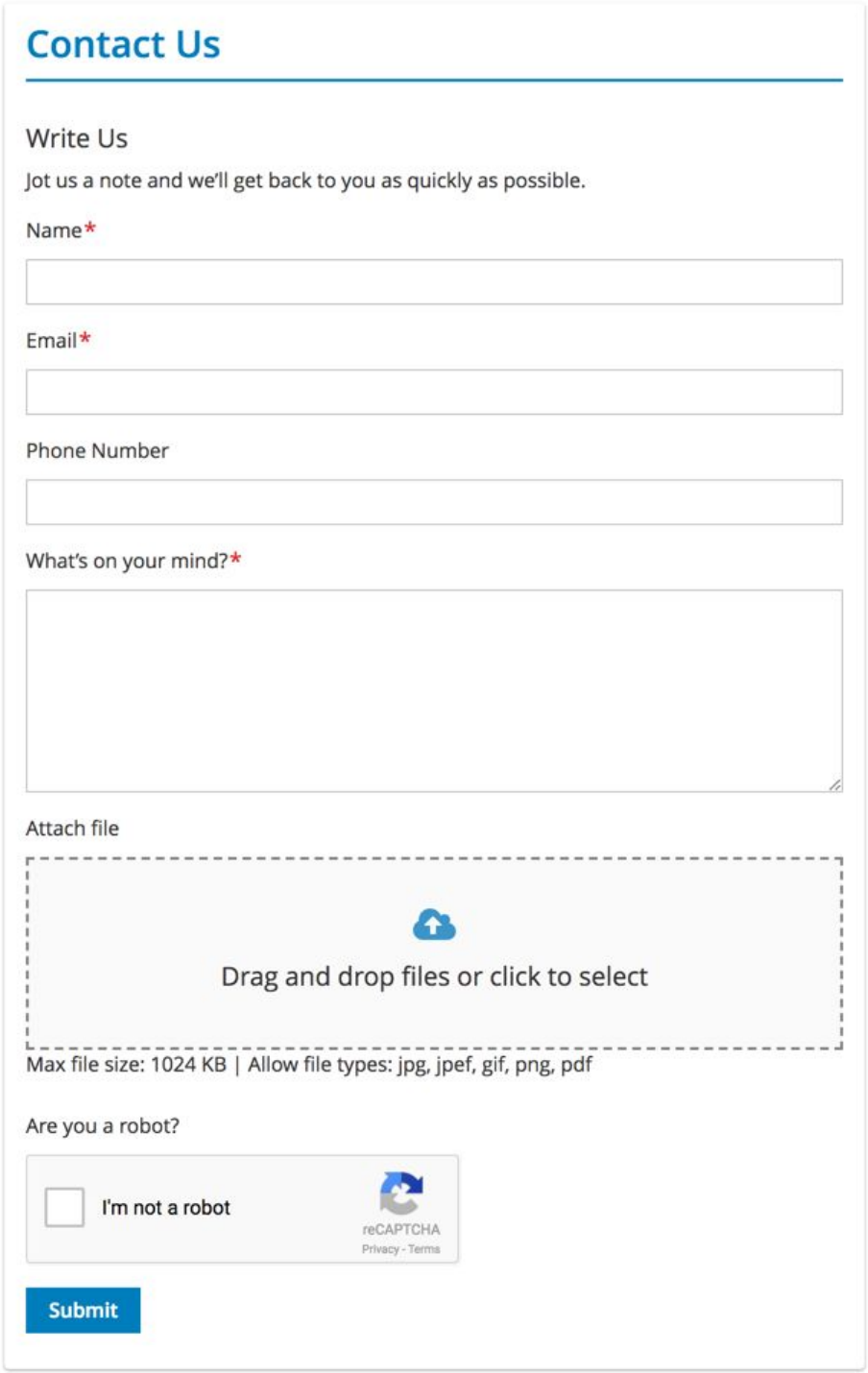
1) Book An Appointment



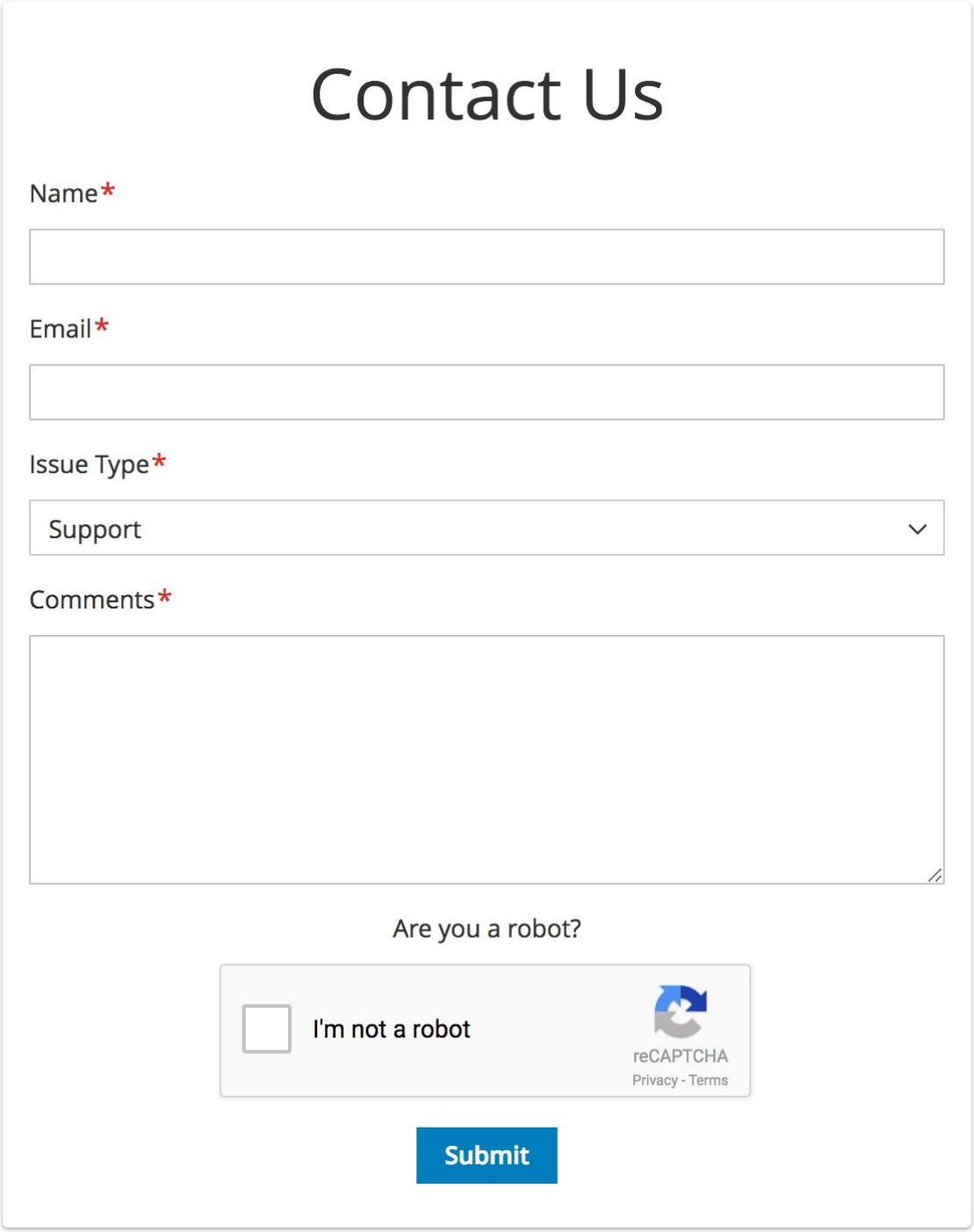
2) Booking Multiple Page



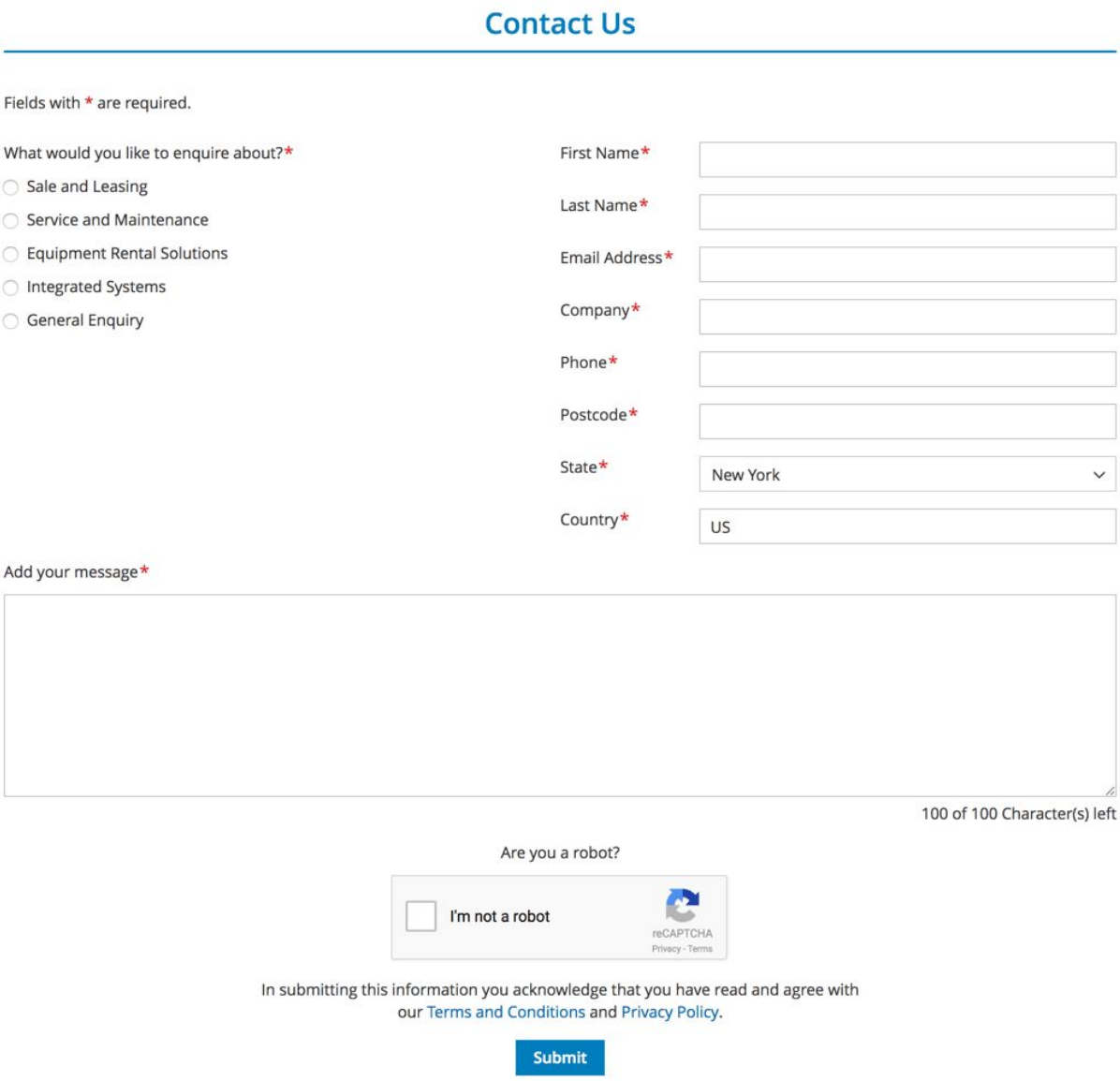
3) Contact Us


Contact Us
Write Us
Jot us a note and we'll get back to you as quickly as possible.
Name*
Email*
Phone Number
What's on your mind?*
Attach file
Drag and drop files or click to select
Max file size: 1024 KB | Allow file types: jpg, jpef, gif, png, pdf
Are you a robot?
I'm not a robot
reCAPTCHA
Privacy - Terms
Submit

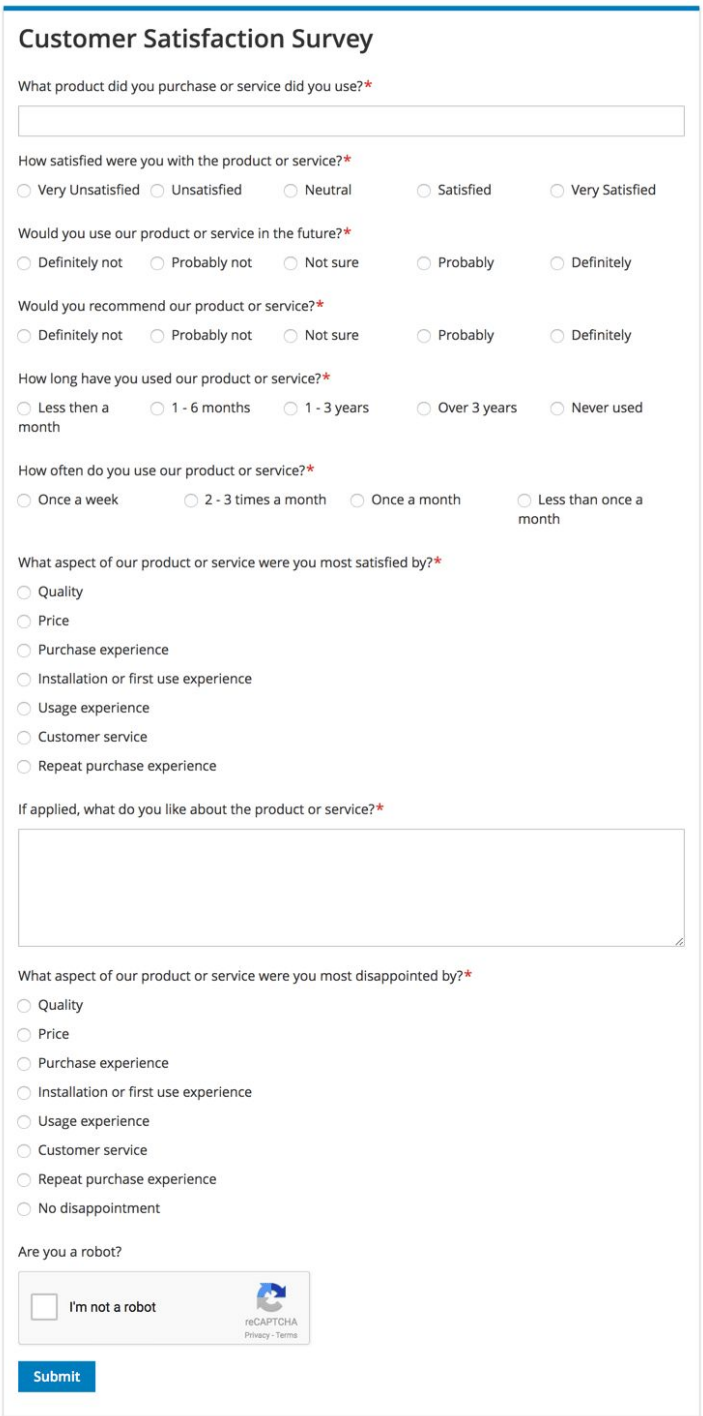
4) Contact Us2



5) Contact Us3



6) Customer Satisfaction Survey



Customer Satisfaction Survey

What product did you purchase or service did you use?*

How satisfied were you with the product or service?*

Very Unsatisfied | Unsatisfied | Neutral | Satisfied | Very Satisfied

Would you use our product or service in the future?*

Definitely not | Probably not | Not sure | Probably | Definitely

Would you recommend our product or service?*

Definitely not | Probably not | Not sure | Probably | Definitely

How long have you used our product or service?*

Less then a month | 1 - 6 months | 1 - 3 years | Over 3 years | Never used

How often do you use our product or service?*

Once a week | 2 - 3 times a month | Once a month | Less than once a month

What aspect of our product or service were you most satisfied by?*

- Quality
- Price
- Purchase experience
- Installation or first use experience
- Usage experience
- Customer service
- Repeat purchase experience

If applied, what do you like about the product or service?*

What aspect of our product or service were you most disappointed by?*

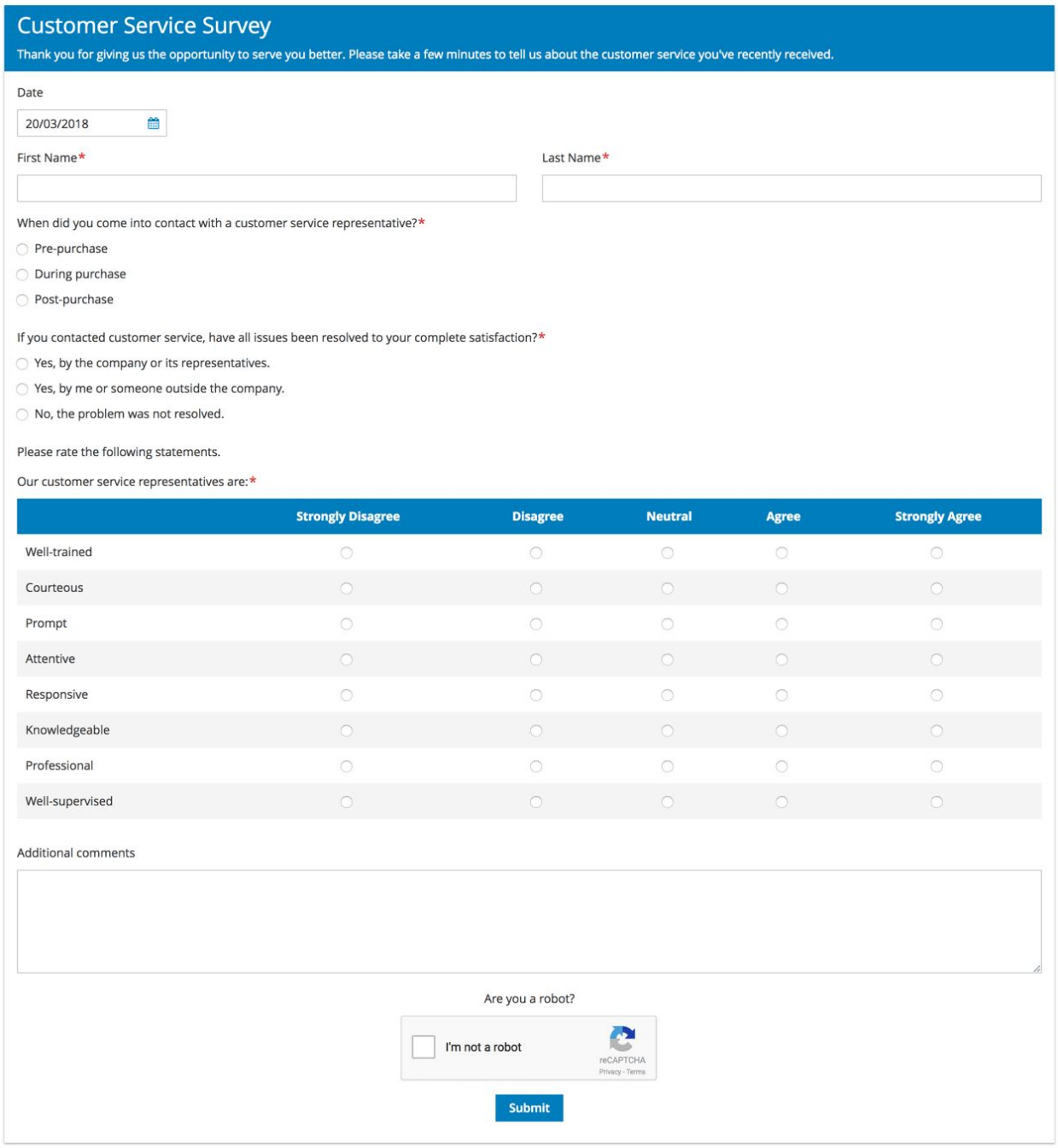
- Quality
- Price
- Purchase experience
- Installation or first use experience
- Usage experience
- Customer service
- Repeat purchase experience
- No disappointment

Are you a robot?

I'm not a robot reCAPTCHA Privacy - Terms

Submit

7) Customer Service Survey



Customer Service Survey

Thank you for giving us the opportunity to serve you better. Please take a few minutes to tell us about the customer service you've recently received.

Date

20/03/2018

First Name*

Last Name*

When did you come into contact with a customer service representative?*

- Pre-purchase
- During purchase
- Post-purchase

If you contacted customer service, have all issues been resolved to your complete satisfaction?*

- Yes, by the company or its representatives.
- Yes, by me or someone outside the company.
- No, the problem was not resolved.

Please rate the following statements.

Our customer service representatives are:*

	Strongly Disagree	Disagree	Neutral	Agree	Strongly Agree
Well-trained					
Courteous					
Prompt					
Attentive					
Responsive					
Knowledgeable					
Professional					
Well-supervised					

Additional comments

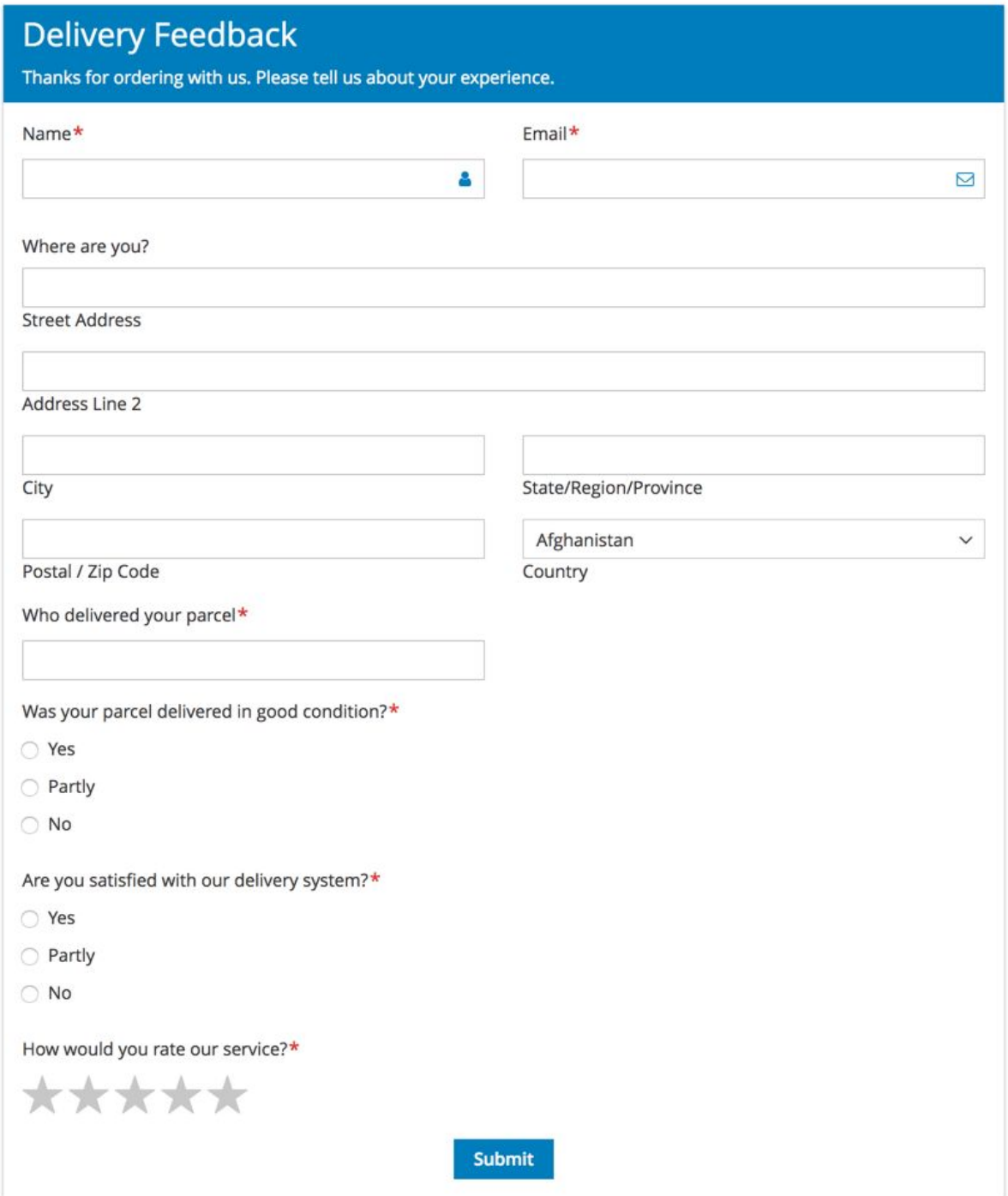
Are you a robot?

I'm not a robot

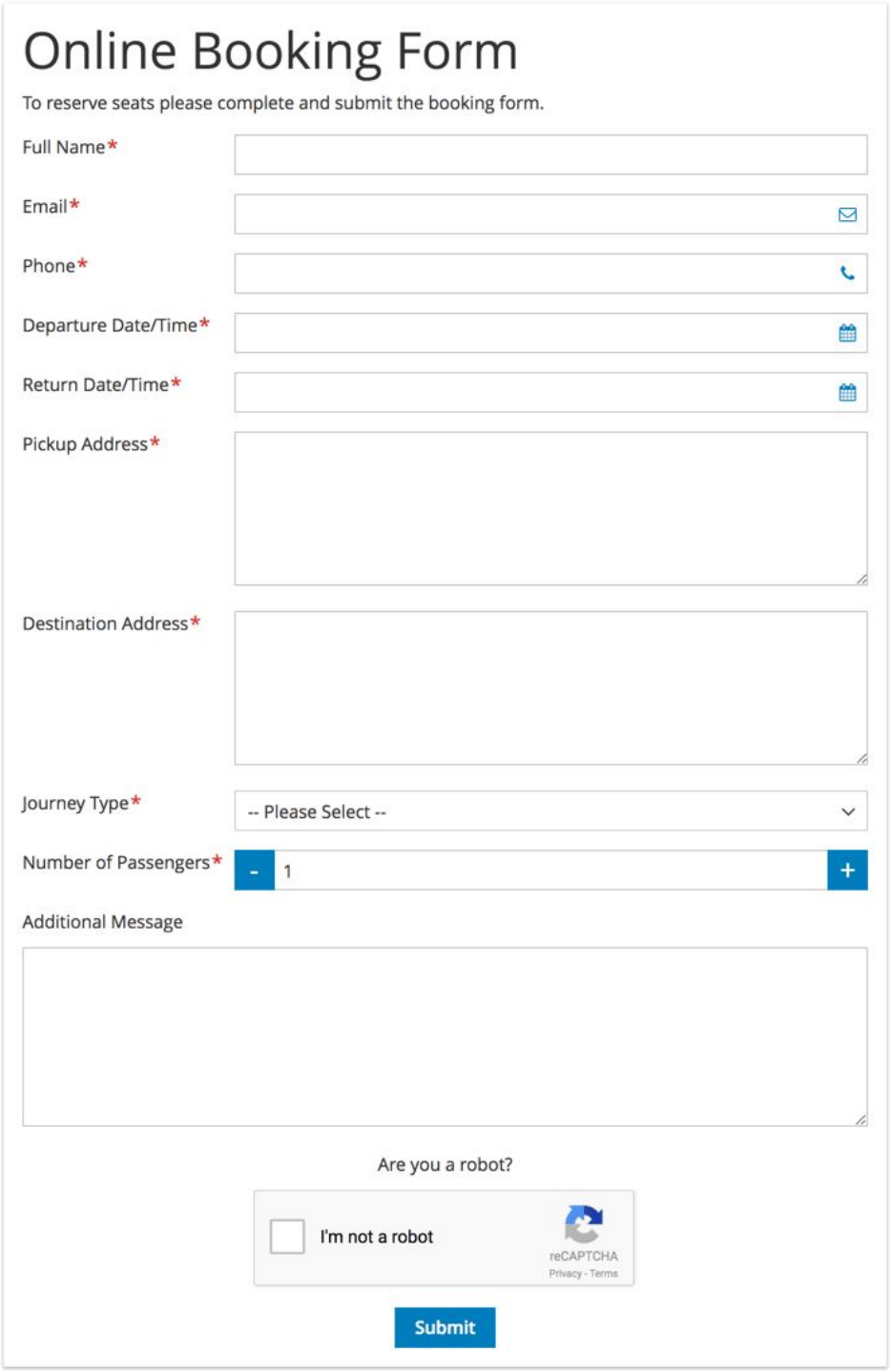
reCAPTCHA
Privacy - Terms

Submit

8) Delivery Feedback



9) Online Booking Form



VII) Support

We support all our customer through our website https://www.magezon.com or mail us on support@magezon.com.

If you have any questions on Extension or need support with its use please contact us https://www.magezon.com - we're happy to help you