Creating Gravity Forms - Transcript

Hello and welcome to another OET tutorial. My name is Joe Naccarato, and today, I'd like to talk about Gravity Forms. Gravity Forms is a plugin that is available on every OET WordPress install.

We often think about our websites as places where we can communicate out to our visitors. We post news about what is happening in the center. We post event updates so people know when things are happening. We can also use our websites to gather information from users. We can have users sign up for newsletters. We could alumni give us updates on what they are doing today.

Gravity Forms makes this really easy. You get a drag-and-drop interface that lets you bring any kind of input you want onto the form. You can have basic text inputs. Or, you could have more advanced security inputs to keep you from getting spam or false submissions. So, lets see how to set up a Gravity Form.

This tutorial is going to assume that you have access to your WordPress site's Dashboard. The easiest way to get to the Dashboard is to go to type your domain followed by "/wp-admin" into your browser's location bar. This will bring you to the login screen where you can enter your username and password. Once you log in, you'll be taken to the Dashboard of your website.

The Dashboard gives you access to all of the content for your website. Today, we're going to be creating a form. If we look to the left side of the screen, we'll see all the different types of things we can add to our site. One of those options is forms. If we hover over that item, we can select New Form from the pop up menu.

When the New Form screen loads, we are presented with a dialog asking us to provide a form title and an optional description. For this case, I am going to provide the simple title of "Test Form" and a basic description. These two items can be shown or hidden later depending on the options that we give WordPress. So, I am just going to click the Create Form button.

Once the form is created, we'll be taken to the form editor window. Every new form starts you out with these directions on how to create a new form, but these

directions all go away once I add an element. I'm going to start by showing you the simplest element - Single Line Text.

On the right hand side of my screen, I'll see all of my fields. Single Line Text is the first button. To add the field, I simply click on the button. You'll see the field appear in the form on the left. It starts out with the default name of "Untitled". You're probably going to want to change that to give the user a clue about what type of data they should enter.

To change the name of the field, I will click on the "Edit" that appears when I hover over the field. When I click "Edit", the field will expand and show me a bunch of different options that I could set. I'm going to start with the basics and set the name of the field. This will be a field where the user can enter his/her name so I know who is submitting the form. So, I will simply put the word "Name" there. You'll notice that the text above the field changes to match what I put in the Field Label.

The description is optional, but you can use it to help your users understand what they are supposed to put in. So, I will put "Your name". Notice, that the text from the description now appears below the field. With every field, we also have the option to set some rules.

At the bottom of the options window, you'll see that there are two available for single line text. We can set the field to be required by checking this box. This will add the familiar red star next to the Field Label, and this tells the user that they must fill in this element to submit the form. If they try to submit the form without filling in the element, they will be prompted to fill it in before submission.

We also have the option to require the user to input unique data by checking the "No Duplicates" box. If the data that is input in this box matches any data that is in the database for this field, the form will be sent back to the user with a prompt that they must enter unique data. These are the basic options that we can set for a single line text field. I want to move and show you a different kind of element. So, I'm going to close these options by clicking on the close button.

To the right in Standard Fields are all the different kinds of fields we could add. Single Line Text, Paragraph Text and Number are all similar types of fields. They allow the user to freely enter any data that they wish.

Drop Down, Multi Select, Checkboxes and Radio Buttons are also similar types of fields. They present the user with a list of options they can choose from. I'll just show you one of these as the others are all set up similarly. So, we will choose checkboxes by clicking on the button.

Again, we will be presented with the field on the left hand side of the screen. It will be labeled untitled. This time instead of the open ended field we see above in Name; we have a list of options - First, Second and Third choice. Most likely, you will want to change these. So, we will hover over the field and click on the "Edit" button. This time there are more options.

They have the familiar field label that we can set to whatever we like. Let's use "Label One". We then have our list of choices. First, Second and Third choice are added by default. These are text boxes that we could edit to put in whatever we want. I will leave them for now.

On the left side of every choice we have an up-and-down arrow. Clicking on this arrow allows us to move the items to rearrange them in the list. I can drag it up or down. I can change them as many times as I want.

The checkbox next to the arrow allows us to designate a default choice. If I were to check "Third Choice", when a user loads the form the first time, "Third Choice" would automatically be selected. They could go ahead and deselect it if they like, but this is your opportunity to set a default option.

To the right of the name we have a plus and minus button. The minus button removes a choice, and all the other choices would shift up to take its place. The plus button adds an item below the choice. If I click plus here, notice a new item pops in under "Second Choice". I'll type fourth choice into that one.

I'll return to the "Bulk Add" button in a second. Below that, we have the optional "Description" field. We can enter one if we feel it will help the user. Below that, we have the "Required" rule that we can set; forcing the user to answer this question.

Let's return to Bulk Choices. If you have a common list that you want the user to select from, Gravity Forms has built some common lists for us and can load through this button. Let's click the Bulk Add button, and we will get a new dialog box.

On the left hand side, we'll see a good number of options. I'll choose "U.S. States". When I click on that, it will replace the list on the right hand side with this pre-defined list. If I decide I want to use this list, I hit "Insert Choices". When I scroll down, you'll see that all of my choices have been replaced by the States in the U.S.A. Be careful, because this Bulk Add button replaces anything that is in that field.

These are all the basic options for lists. Drop Down, Multi Selects and Radio Buttons all follow this same pattern. Since I'm done enter data, I'm going to click on close.

I've got two items entered and that is good enough for our test. So, I'll save the form by clicking "Update Form". Remember to update often to avoid loosing data in the result of an error. WordPress has successfully saved the form.

For the users to interact with the form, I need to put it on a Post or a Page. I've already created a test page so I will click over to that. I'll put my cursor in the text editing area, and click the "Add Form" button above our text editor. I'll be presented with a dialog box to select a form.

When I click the "Select a Form" drop down, I can see my test form and any other form that I may have created. I'm going to select "Test Form". Then, I have the options of displaying the form title and form description. Since my page already has a title, I will not display the title. With my options set, I'm going to hit the insert form button.

This adds a short code into my page text. This code will be expanded into the form when a user views the page. So, I will update my page. Then, I'll view my page. You can see that both of our fields are listed: Name and Label One. All the way at the bottom is the Submit button.

Gravity Forms is an easy way to create these forms. And a great way to make your website a little more interesting for users. If you'd like help with Gravity Forms, you can always email us at oet-help@udel.edu. Hopefully, we'll have some more Gravity Forms tutorials in the future. In the meantime, thanks for watching.