Gravity Forms: Creating a Form

1. To create a Gravity Form, you must be logged in as an Administrator. This is accomplished by going to http://*your_url*/wp-login.php.

2. On the login screen, enter your username and password, and click on the "Log In" button.

3. Once you log in, you will be taken to the Dashboard for your site (see an example below).
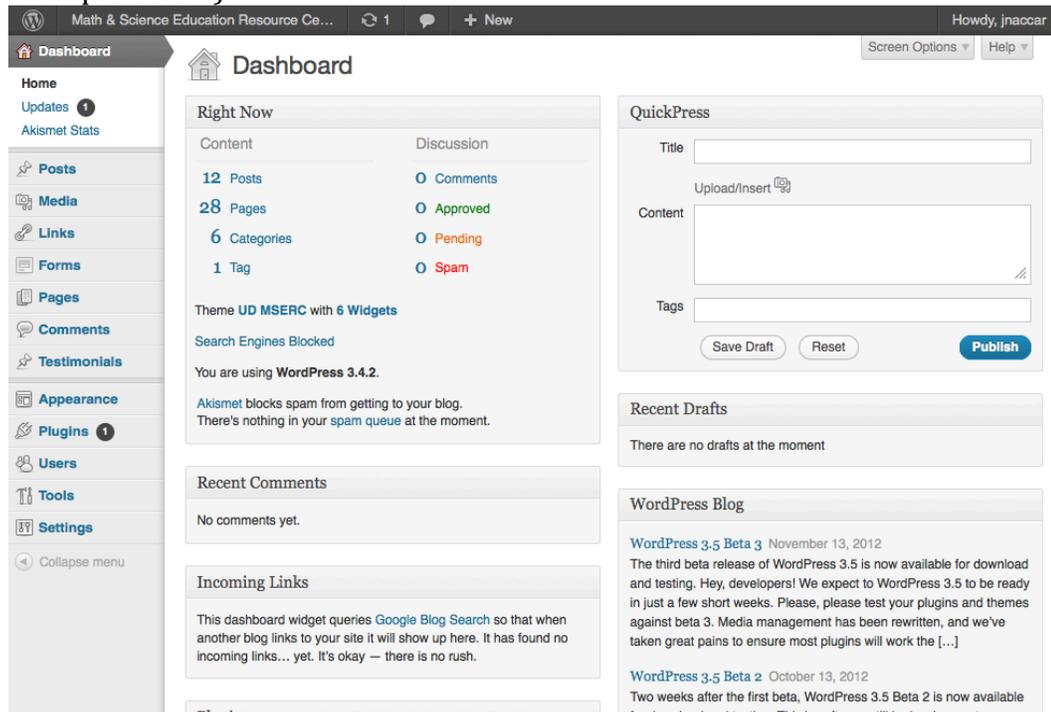
4. With Gravity Forms installed, your left hand menu will contain a "Forms" item. Click on this item, to load your Forms screen.

5. The Forms screen allows you to view any existing Gravity Forms. You may have 0 or more forms listed on this screen depending on whether or not your group has used Gravity Forms before.
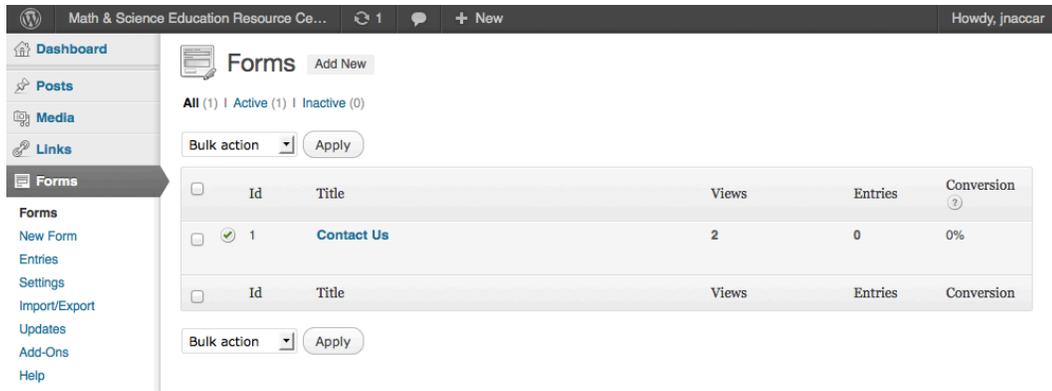
Setting Up A Form

Once you make your way to the forms section. You will need to add a new form to begin capturing data from your users.

1. To create a new form, click on the "Add New" button at the top of the page, just below the gray Admin Bar.
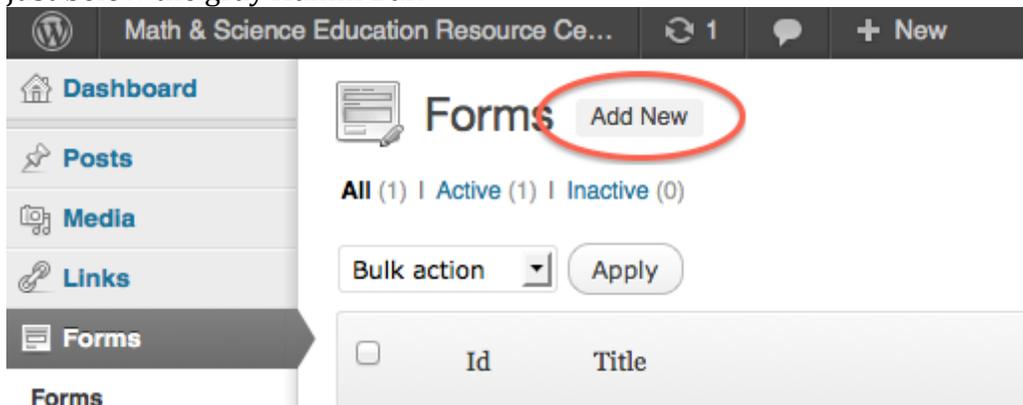
2. Once you click the button, the form-editing screen will appear with the title "New Form". We will do all of our editing from this screen.
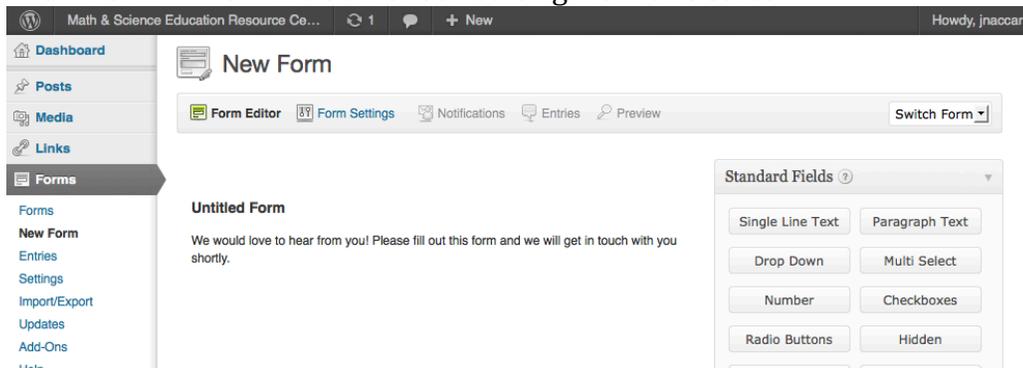
3. Before creating the form, we must fill in its basic settings. To access the settings, hover the mouse over the "Untitled Form" until the "Edit" button appears. Click on the "Edit" button pictured below.
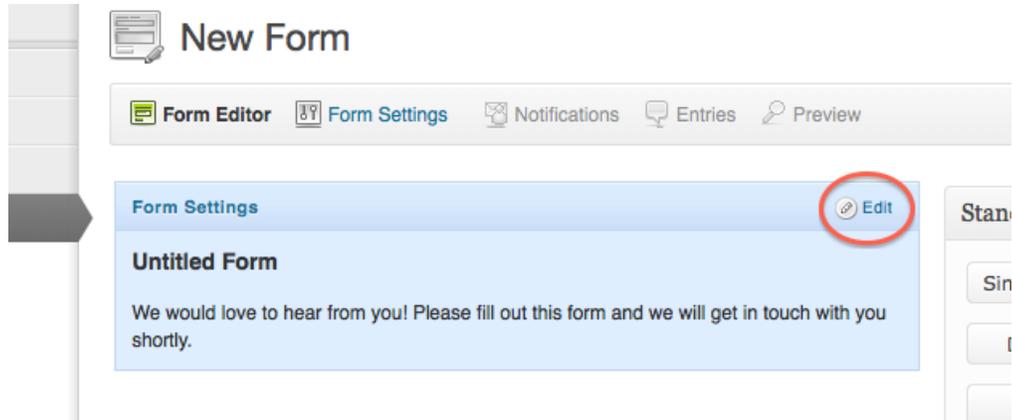
4. Clicking edit will bring up a set of options to fill in.

Fill in a Title and Description that will be displayed along with the form. Next, we will set up the message users receive after filling in a form.

5. The Confirmation tab allows you to set the text that the user will see after they submit your form.

The Confirmation Message radio buttons allow you to choose how your users will see your Thank You message.

    a. Text – Will replace the form fields with the message that you type in the large text box.

        You can include data from the form, such as a name, by using the "Insert Merge Tag" drop-down menu. This menu will include any fields that have been added to the form. To use the "Insert Merge Tag", you must first save the form to register the fields in the drop down.

b. Page – Will direct the user to a pre-existing page after submitting the form. When selecting this radio button, the large text field will be replaced by a drop down that lists all the pages in your site. You can choose any page from your site.
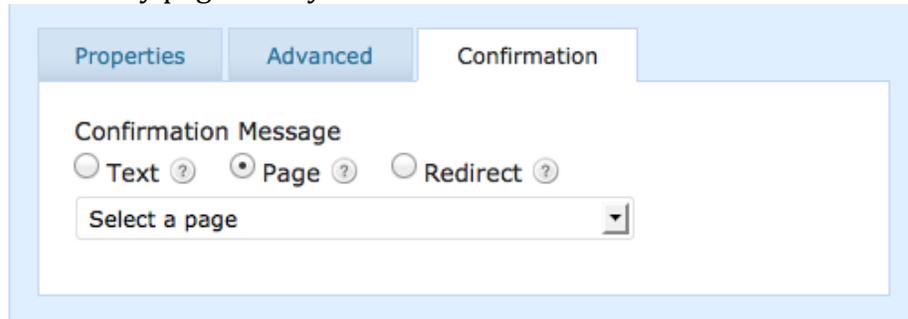
c. Redirect – Will be used rarely, this takes you to a page that is not on your site. If you choose this option, you will be presented with a text box to type in the desired URL. You can pass the form data to the URL using the "Pass Field Data Via Query String" checkbox. Again, this option should only be used in special cases.

6. Once you have finished with the settings, it is a good idea to save the form. Do this by clicking the "Save Form" button in the right hand column of the edit screen.
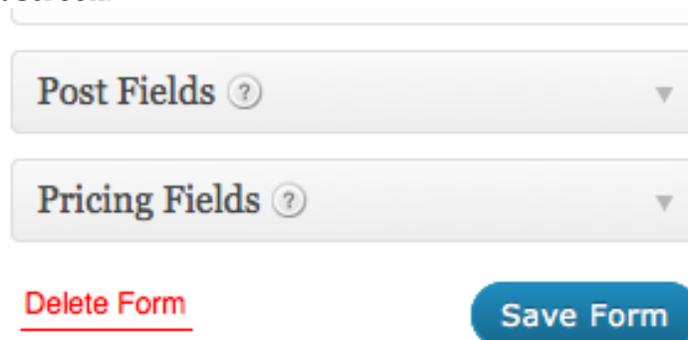
7. After clicking the button Gravity Forms will present a dialog box asking what you would like to do next.
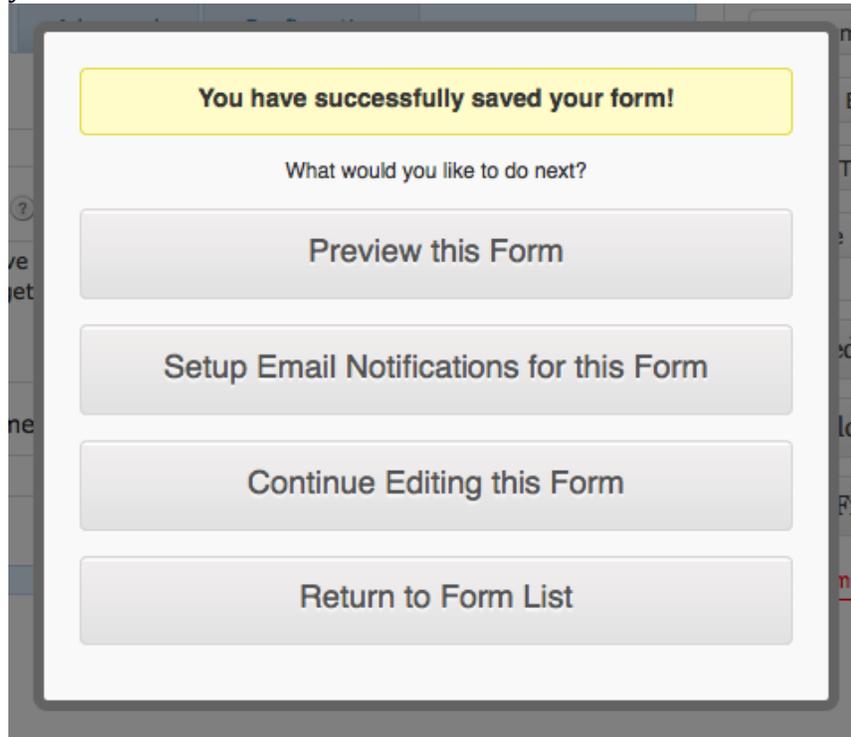
In most cases, you will choose "Continute Editing this Form" to add more fields. However, the other options may be valid if you have nothing else to add to the form.

8. With the form saved once, the "Save Form" button will become "Update Form", and you will not be presented with the above dialog box again for this form.

Adding Form Fields

You can add many types of fields in Gravity Forms. The main ones you will use are separated into two groups: Standard Fields and Advanced Fields. Standard Fields contains all the basic fields you may want to add to a form. They don't contain any special validation or attributes. Advanced Fields contains fields for capturing specific kinds of data like dates or email addresses. You can add as many fields as you like to a form, and each field only requires a few steps.

1. Adding a field requires locating it along the right hand side of the page in one of the field sections.
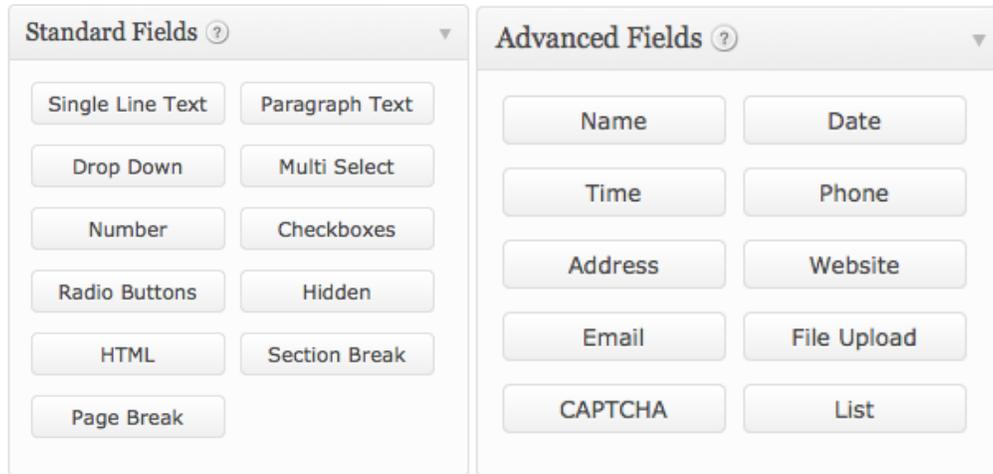
2. To add a field into your form, click on the button with the name of the field that you would like to place.

3. This will insert a field named "Untitled" at the bottom of your form.

4. Once the field is in the form, you can edit its properties in much the same way that you edited the form's settings. Hover your mouse over the field name ("Untitled" in this case). The field background will turn blue. Click on the "Edit" button that appears in the blue area near the top right.

5. The different types of fields will have different edit options. However, all allow you to edit the Field Label and Description. These will be displayed when a user views the form.
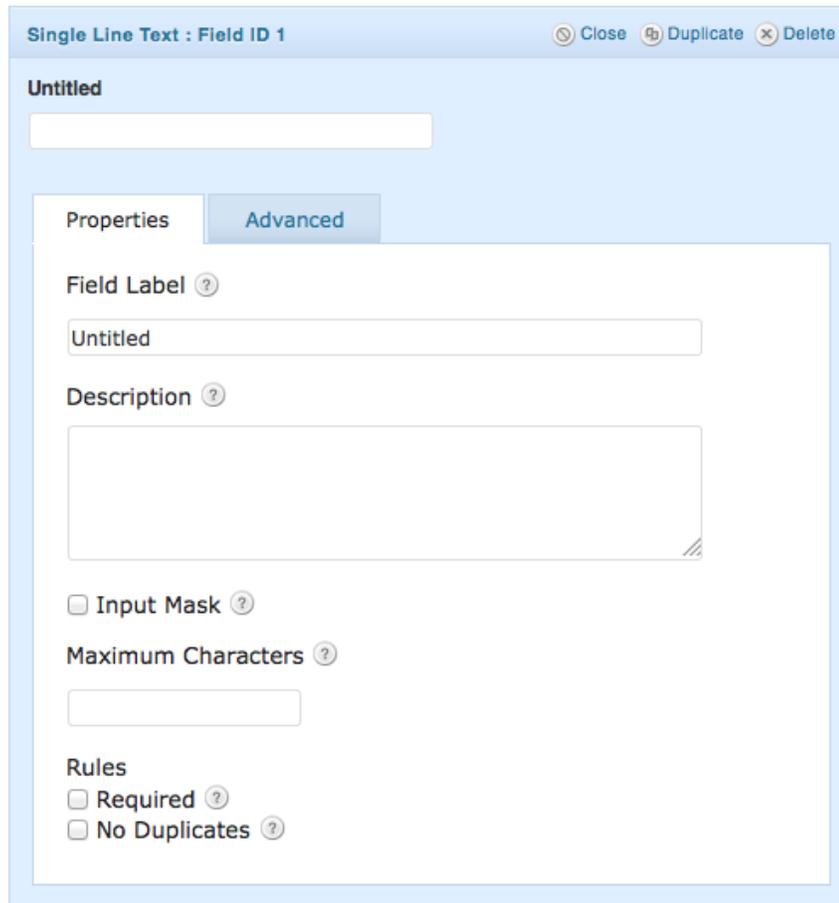
6. All fields also give you at least two Rules that you can select:
   a. Required – This checkbox will require a user to fill in a field before submitting the form. If the user attempts to submit the form without filling the field, the user will be alerted to fill in the form before continuing.
   b. No Duplicates – The value for the field must be unique. It must a value that no other user has submitted before.

7. The Advanced tab contains many options, but all you may really be concerned with is the Field Size option. This can be set to Small, Medium or Large to change the look of the field. It is safe to leave the field at Medium for now.
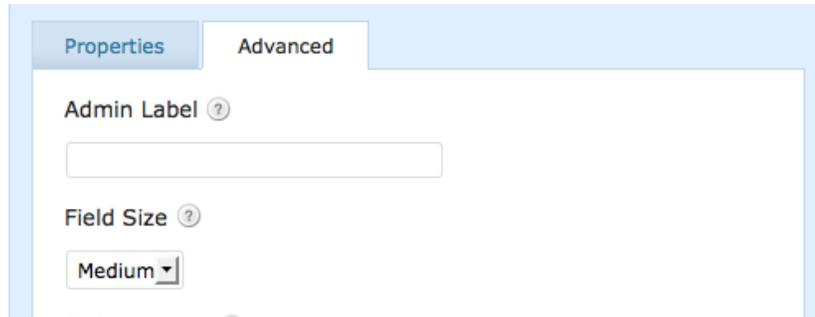
8. With your options set, you can hide the editing section by clicking on the "Close" button at the top of the blue field section.
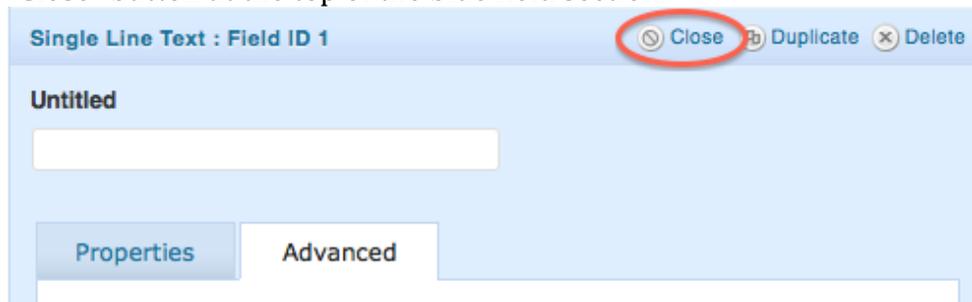
9. It is a good idea to save often. When you finish a field, you can click the "Update Form" button to save your progress.
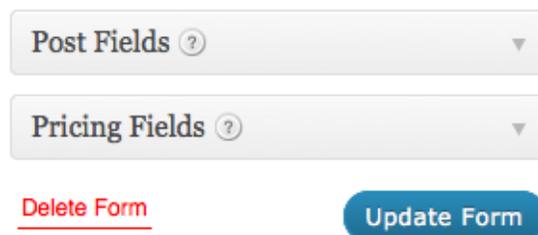
You can repeat this process for each field that you would like to add.