SimplyCast eMarketing
Form Builder
User Guide

Contents

1.   Form Builder Overview

Online forms are one of the easiest ways to gather customer data and to allow new subscribers to opt in to receive your messages. All you have to do is post forms on different websites and social networks to ensure you can capture customer information all the places they visit.

People simply input their contact information and the data is automatically captured into your SimplyCast eMarketing account, where you can use it to send messages, better target messages, segment customers and more.

The SimplyCast eMarketing Form Builder tool is extremely easy to use. It is easy to customize your forms and opt-in process. Just pick a template and customize it to match your brand, your website or any criteria you want.

Online forms are completely customizable to your needs, and you can add, remove and rearrange any fields. You can also choose from different styling options, field types, and many different design elements so you can create a professional looking form quickly and easily.

2.   Features Overview

Custom Configuration	Having the most options to customize your HTML web forms is what you should be looking for in a solution. The sign of a powerful form creation tool is that the automation and technology is taken care of by us and you make your form look exactly how you want it. With our form builder solution, you can add custom configurations on almost every aspect of the form. This includes the fields on the actual form, the optin settings and the verification process when someone signs up. Everything is simple to edit and does not require any programming skills.
Drag and Drop Creation	Create forms in only a few minutes without having to know a single bit of coding. All you have to do is drag the fields you want into your form, arrange them and complete any customization that you require. Using our simple drag-and-drop form builder could not be easier. Once your form looks the way you want, get the code or a URL for easy distribution. We also offer many form templates that you can choose from.
Full Form Management	One of the best features of our online form generator is how easy it is to manage multiple forms at once. Every form you have made is listed under the "Forms" tab on the dashboard. This allows you to quickly see what forms are active and if you need to get the HTML code to add them to your site, it is right there. If you have multiple websites, landing pages or blogs, being able to see all your forms in one place makes it simple to manage them. It is easy to find the form you want and edit or change the status of the form.

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Generated HTML Code	By using our online HTML form generator, we make it easy to add a form to your website without knowing one bit of HTML code. You build the form using drag and drop technology, edit each field how you want it and click "Next." Our software automatically generates HTML code that you paste into your website. The form is ready to begin gathering subscriber information as soon as you implement it.
Limit Number of Submissions	If you only want a specific sample of data you can limit the number and types of submissions you get. Beyond this, you can limit or block certain IP addresses from accessing the form.
Opt-In Settings	Using HTML web forms is the best way to build opt-in lists. You should never buy or rent lists as you have no idea where the data came from or how accurate it is. With an online form, you have total control over your the proper collection of your lists. With the opt-in settings, you can control the type of opt-in you want to offer. This could either be having the user reply to an email to prove verification or just click a link. Single opt-in requires the subscriber to click a link to subscribe; double requires them to reply to the requested email in order to be added to the list.
Templates and Backgrounds	We offer many free form templates that are professional-looking and fully customizable. No matter your skill level, you can add attractive signup forms to your website. We offer numerous templates, as well as many customization options in our editor. Our team of designers also takes requests for templates, so contact us to get your professionally designed custom template.
Various Field Types	There are many different purposes for a form and many types of data that can be collected. That is why our form builder solution offers various field types that can be easily dragged into the form template. Choose and easily add whichever ones you need.

3.   How to Create a Form Project?

In this section, we will walk you through how to create a basic online form step by step.

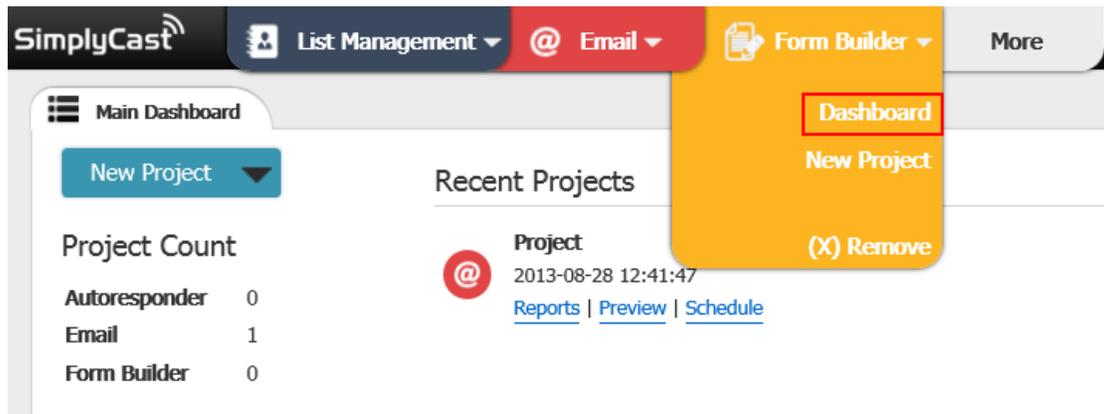1.   Go to https://marketplace.singtel.com/Account/Login and login with your mybusiness login ID and password.
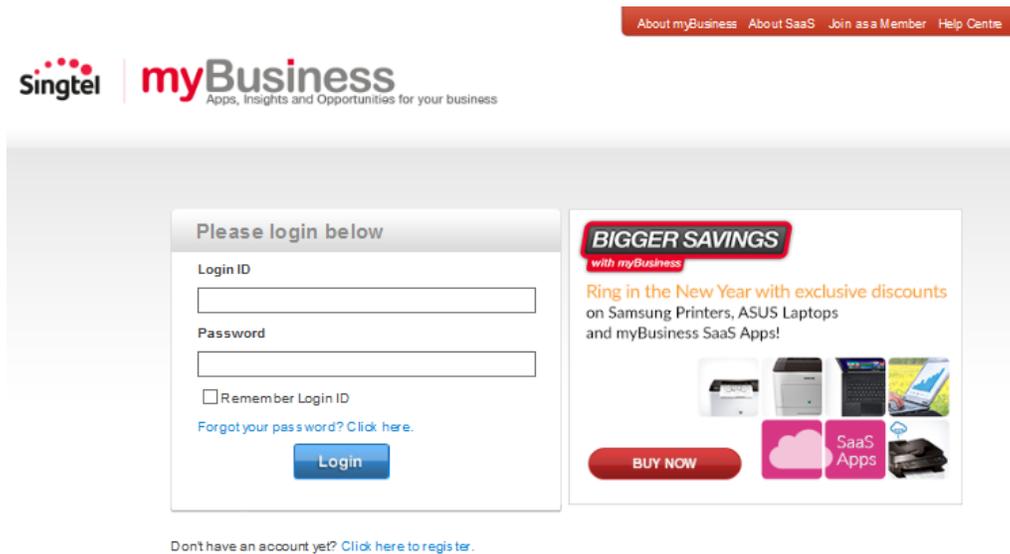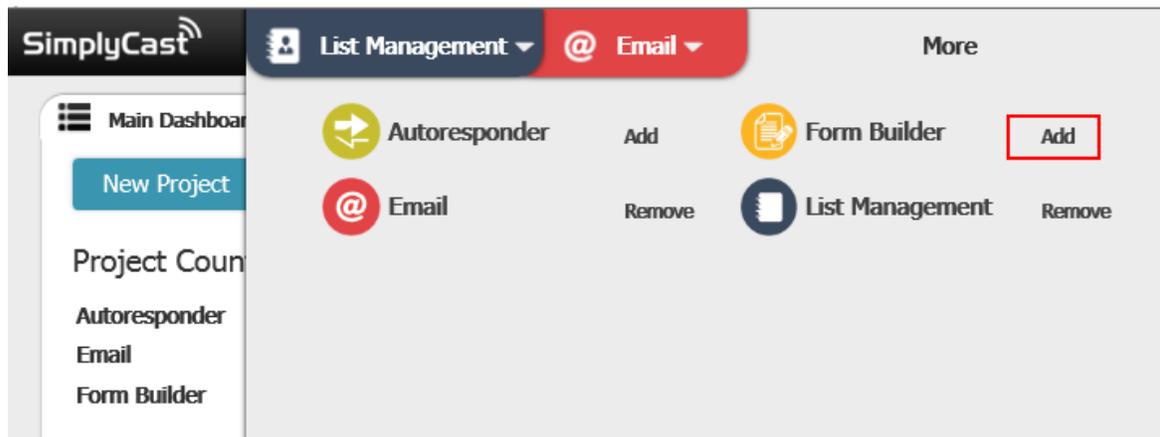

2.   In mybusiness Dashboard, Click on power button to launch SimplyCast.
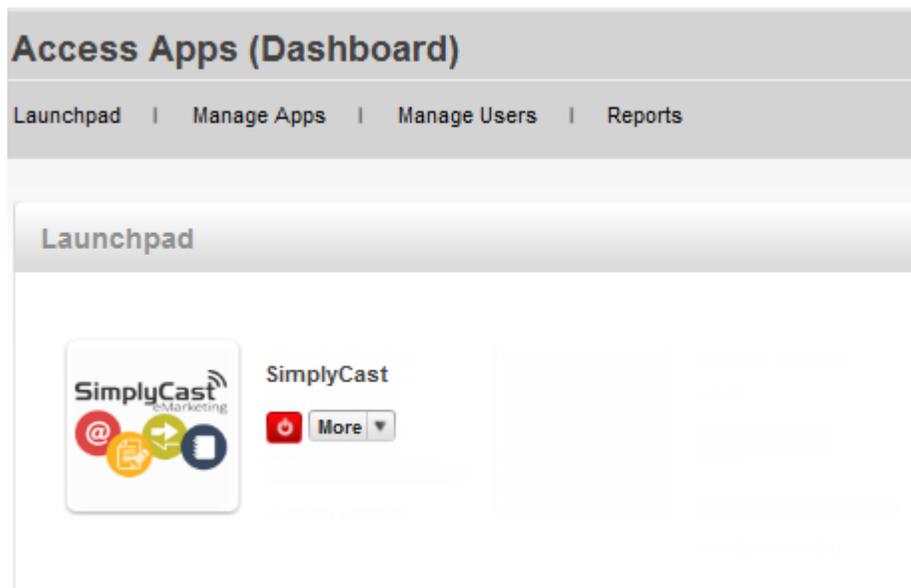
3.   Click on Dashboard from Form Builder menu bar to access the Dashboard.

Or if you don't see Form Builder on top menu bar, click "More" button and click Add beside Form Builder to appear on menu bar. Then click on the new Orange Form Builder Bar to access the Dashboard.

4.   From the Form Builder dashboard, click "Create Project."
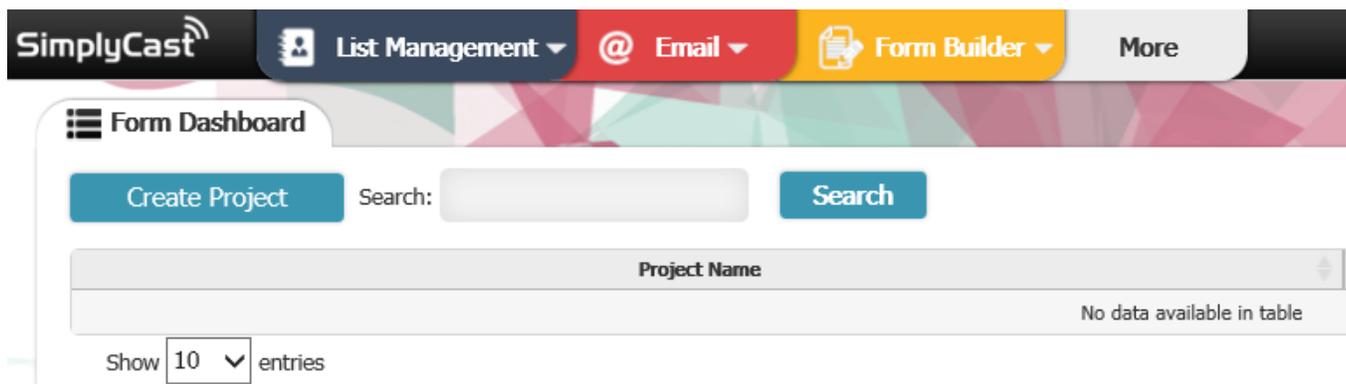
You also have the option to "Copy Existing" to copy an online form that you have already created. You can use it as it is or edit it as needed. If you haven't created any Form project yet, you won't see "Copy Existing" option button.

If you need to return to the previous page at any time, click the blue "Back" button on the left side of the screen.

5.   When you click "Create Project" you will be taken to a "Setup Project" page where you must enter a name for your online form project.
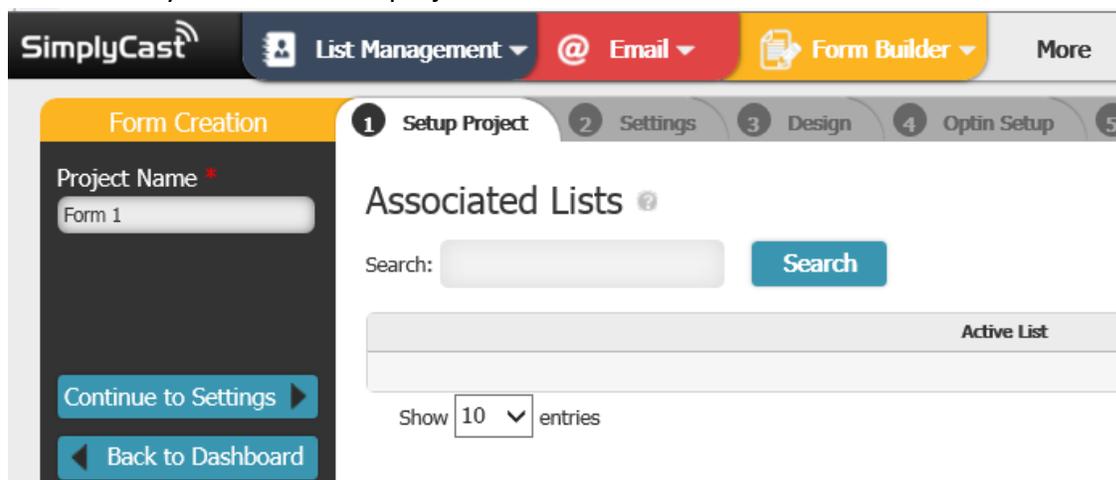

In this step, you must also associate a list with your form. When your form is filled out by subscribers, their data will be transferred to this list. The list will start out blank, and as it receives data it will use the same fields as the fields that are on your signup form.

To associate a blank list, click "New List." A pop-up will appear where you will enter the name of your new list and click "Create." Collected data from your form will now enter this list, where you can view it. To view collected data for that list, go to the List Manager, which is available at the top of the Form Builder dashboard screen.
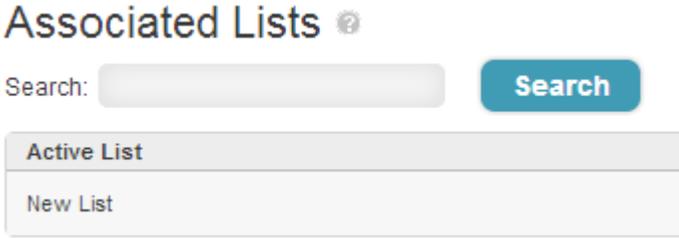
You can search for the specific list you are looking for by entering the name of the list into the "Search" bar.

When you have named your form project and associated a list, click "Continue to Settings."
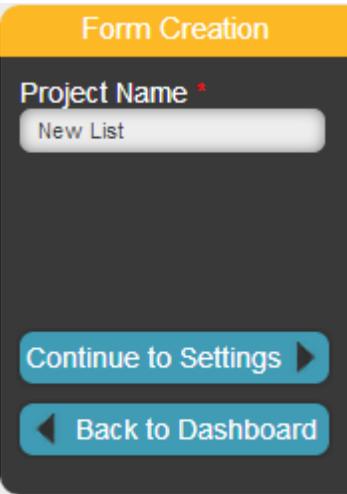
6.   You will now be on the "Settings" page. Here you have several options.

Basics

If you would like the collected data results from form submissions to be emailed directly to you, check the "Email Results" box and enter the email address in which you would like to receive the results.

If you would like people who fill out the form to be redirected to a certain page after they submit the form, check the "Redirect After Submission" box. Fill in the URL that you would like users to be redirected to, and enter a redirect timeout. This is the length of time the system will wait before redirecting users. Enter your redirect timeout numerically. Enter the number of seconds that the system will wait.

If you would like people who click the link in the confirmation email to be redirected, check the "Redirect After Confirmation" box. Fill in the URL that you would like users to be redirected to, and enter a redirect timeout. This is the length of time the system will wait before redirecting users. Enter your redirect timeout numerically. Enter the number of seconds that the system will wait.

"Reply Address" refers to the email address that people using the form can reply to if they have questions. Select the email address that you prefer to use from the drop-down menu.

If you want users to enter a password to access the form, enter it in the "Password" text box. If you do not want a password on your form, leave this space blank.

"IP Count" is the number of unique IP addresses that will be allowed to access the form. If you would like it to be unlimited, leave this value at 0.

"Total Count" is the total number of users who can fill out the form. If you would like it to be unlimited, leave this value at 0.

Basics

☐ Email Results

☐ Redirect After Submission

☐ Redirect After Confirmation

If you would like to prevent any IP addresses from being able to fill out your form, you can enter them in the "Blocked IPs" text box. Enter the IP addresses one on each line.

<u>Advanced</u>

Only use the Advanced section if you are an advanced user and you wish to change your opt-in process.

"Post Page URL" is used when you want to handle the opt-in process yourself instead of having our application do it. The Post Page URL refers to the website where the form will be posted, and you must handle the opt-in process through this page.

"Post Page Target" is the target window of the URL. You can select the Post Page Target from the drop-down menu.

Advanced

Changing these settings will cause your opt-in process to
causes the signup form to post to a different website, inste
on the post page that you have indicated.

Post Page URL

[   ]

Post Page Target

[_self   ▼]

When you have filled in your settings, click "Continue to Design."

7.   You will now be on the "Design" step. There are two categories of forms you can choose from.

The "Contact" option will bring up a "Contact Us" form template that you can use if you want people filling out the form to be able to contact your company.

The "Newsletters" option will bring up a "Join Our Newsletter" form template that you can use if you want people to opt-in to receive your newsletters.

Select a Category

| Newsletters |
| Contact |

<u>Note:</u> You can edit the text and change any part of the form, so don't worry if neither of these options is exactly what you would like to use your form for. You will be able to easily customize the form.

Click on the form template, which will open it in a pop-up window so you can see a larger version of it. Select the color palette you would like to use from the drop-down menu under "Colors."

"Header color" is the color that will appear at the top of your online signup form.

"Submit Button" color is the color of the button that users will click on to submit their

form. "Text color" is the color of any text that appears on the form.

"Background color" is the color of the background on your form.

If you would like to adjust any of the colors, click on the individual color square in the large color box. A color selector will appear (See Screenshot 3). Pull the arrows along the color bar to access different colors. When the color appears, you can click and hold the mouse over the particular shade you would like, in order to use that shade in your form. The unique color you have selected will now appear in the large color square, as well as on the form template that is displayed.

Under "Header" you can select your preferred header pattern from the drop-down menu.

Under "Background Image," you can select from a variety of background images that can be added onto your form to add an extra graphic element. Select your preferred image from the drop-down menu, or use no image if you do not want to add one.

When you have finished customizing the look of your online signup form, click "Continue to the Editor."

Continue to the Editor
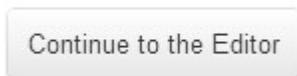
8. You will now enter the second stage of the design process. In this stage, you can make detailed changes to any of the elements on your form. To edit an element, simply click on that section.

Select a Category

Newsletters

Contact
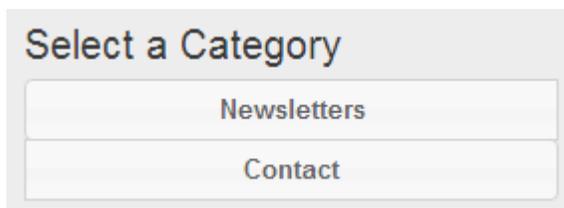
Along the top of the screen, you will see various elements that you can drag and drop onto your form. You can add a text box, an SMS number field and much more. To add an element, simply drag and drop it onto your form where you would like it.
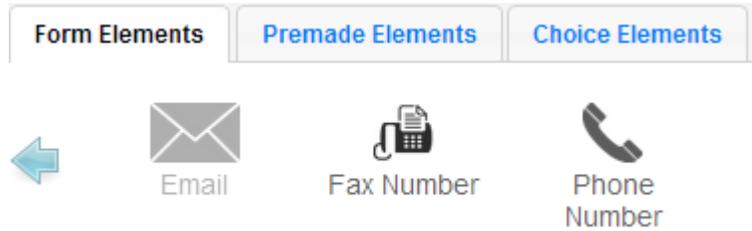
<u>FormElements:</u> These are basic form elements such as email, SMS number, text box, image and so on. Click the left or right arrows to see more options.

<u>PremadeElements:</u> In this section, you can include a "Full Name" field. This option will give you a text box for first name and a text box for last name.

<u>ChoiceElements:</u> These are elements that you can include on your form if you are asking subscribers to make a selection. "Drop-down" will give them a drop-down menu from which they can select their choice. "Checkbox" will give them a square box that they can check. "Radio buttons" are round boxes that they can check.

You can easily change the positioning of the elements on your form by dragging them to move them up or down.
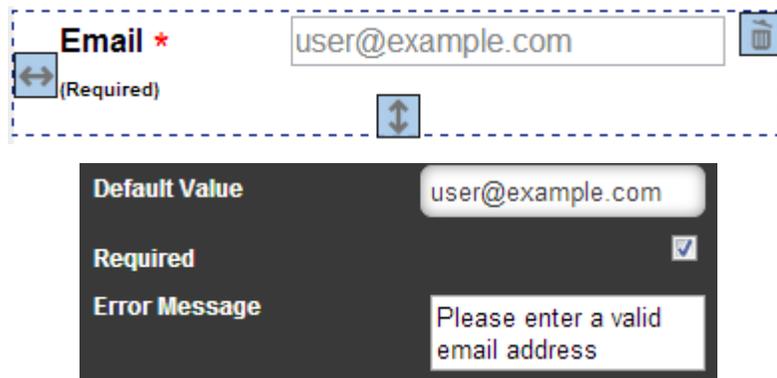
Header: Click on the very top section of your form to edit the color of the header. A "Primary Color" bar will appear on the top left side of the screen. When you click on this color bar, a color selector will appear. Pull the arrows along the color bar to access different colors. When the color appears, you can click and hold the mouse over the particular shade you would like, in order to use that shade in your form. The unique color you have selected will now appear in the large color square, as well as on the form template that is displayed.

"Contact Us" or "Join Our Newsletter" Text: By clicking on this text, you can change what the top part of your form will say. You can also adjust the text color, style, size, alignment and so on.

Email Field: By clicking on the section that reads "Email" you can adjust what it says, the style of text, the amount of padding and more. You can also select whether or not users are required to fill in this field by checking or unchecking the "Required" box.

Name Field: By clicking on the section that reads "Email" you can adjust what it says, the style of text, the amount of padding and more. You can also select whether or not users are required to fill in this field by checking or unchecking the "Required" box.

In this section, you can also create a new list field by clicking "Create List Field."

Submit Button: By clicking on the Submit Button section, you can change the size and look of the button, add padding and change the button text.

Footer: By clicking on the Footer section, you can change the style of the footer text and adjust the background color of the footer.

When you are done adding and positioning elements, click "Next."

9.   You will now be on the "Opt in Setup" page. Here you can adjust your opt in settings.

Opt-in Email: Here you can customize your Opt-In email to be sent once a user subscribes to your list.

Thank You Email: The Post-Opt in Thank You Email can be customized from here.

Submission Page: In this section, you can personalize your submission confirmation page, the page that will appear when someone successfully fills out and submits the form. Simply click the text boxes to edit the text.

Under "Email Type" check the box next to whichever type of email you wish to send, plain text or HTML.

When you have personalized your opt in settings, click "Continue to Publish" on the upper left side of the screen.

10.   You will now be on the "Publish" step.

The different stages of the form process will be listed with "Complete," "Warning" or "Failed" next to them.

"Complete" means that the step has been completed successfully and is ready to be published.

"Warning" highlights areas that could cause potential problems with your form, and that you

may
want to go back and change.

"Failed" means that the step has not been successfully completed and you must fix these problems before the form can be published. If anything is marked as "Failed" the form cannot be published.

When all steps are "Complete" click "Complete Project." Your form will now be published.

A pop-up window will appear with all your online form information.

"Form URL" tells you the URL where your form has been published.

"Form IFrame" is an IFrame that you can use on your website to house the signup form.

"Form JS" is the JavaScript code for your online form that you may copy and paste in order to easily place your form wherever you need it on your website.

"Portable HTML" is the HTML code for your online form that you may copy and paste in order to easily place your form wherever you need it on your website.

4. Collected Data

Data that is collected by subscribers filling in and submitting your online form gets saved in the list that you have associated with that signup form. The list contains fields that match the fields on the signup form that you have created.

To view the collected data from the online signup form, go to the List Manager. The List Manager is available at the top of the Form Builder dashboard screen.

You can search for the specific list you are looking for by entering the name of the list into the "Search" bar.