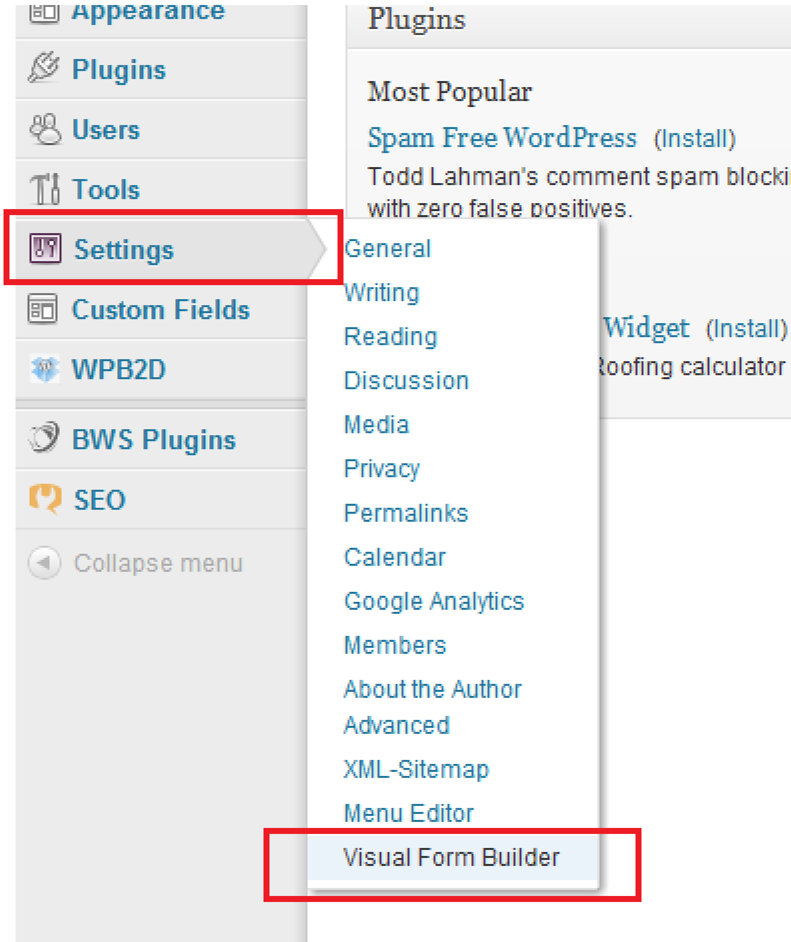
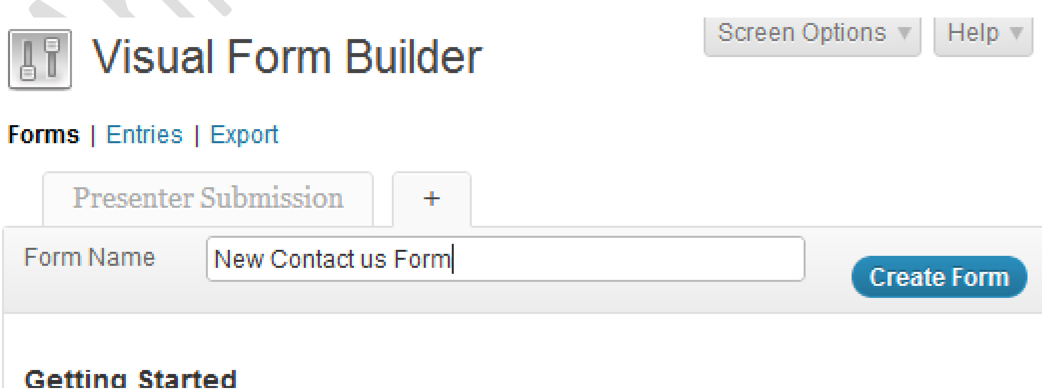
CREATING THE CUSTOM FORM

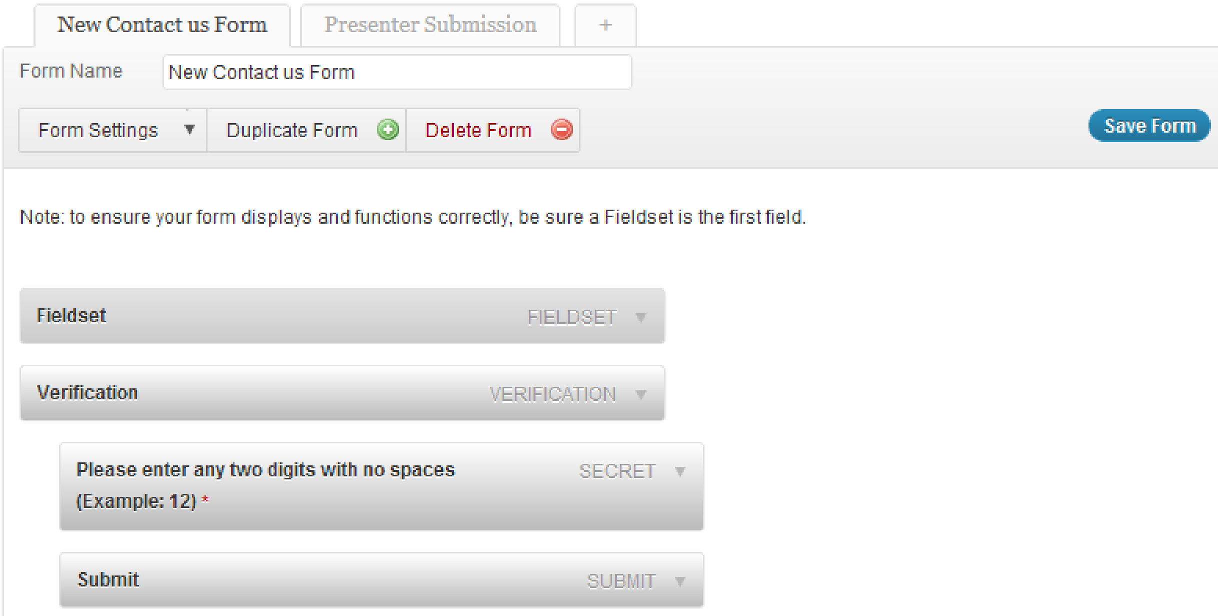
Login as admin user and select **Settings->Visual Form Builder**



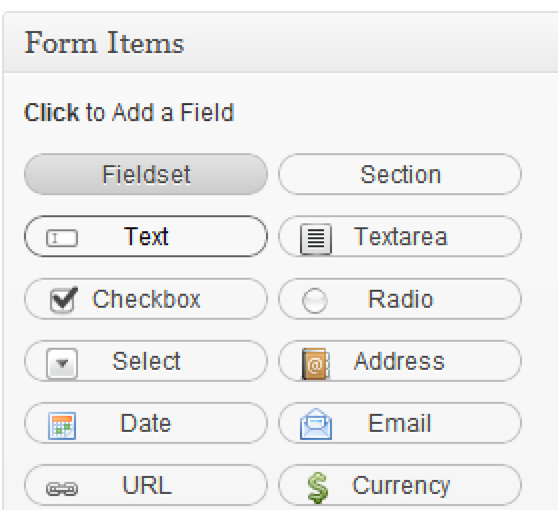
Enter the form name and click on **Create Form** button



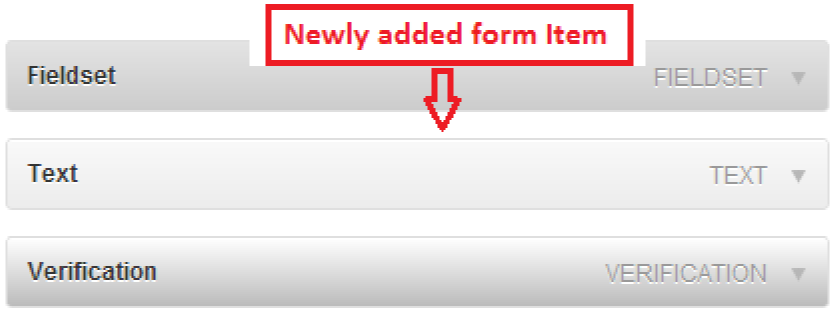
It will create a form and you and the user will see the below form.



You can see a list of Form Items on the left side of the form designer. To add an item to the new form, simply click on the desired element.

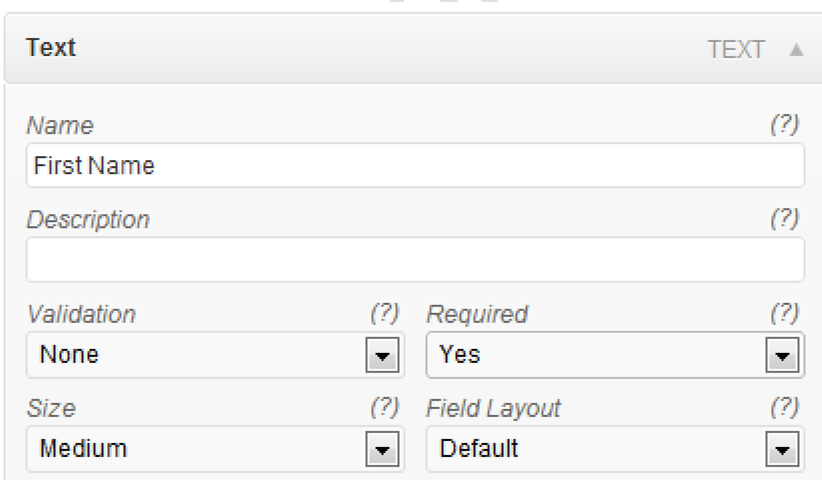


Now you will see the clicked item being added to our form designer.



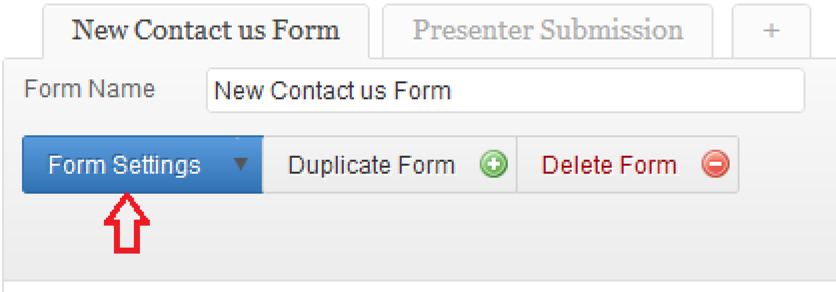
To Edit the properties of the form item, click on the Down Arrow on the right side of the form element.

You can customize it to make the form field Required / Update the label text associated with the form element/ Assign some validation (Ex :Is it a Valid Email Address/ Phone number etc..)



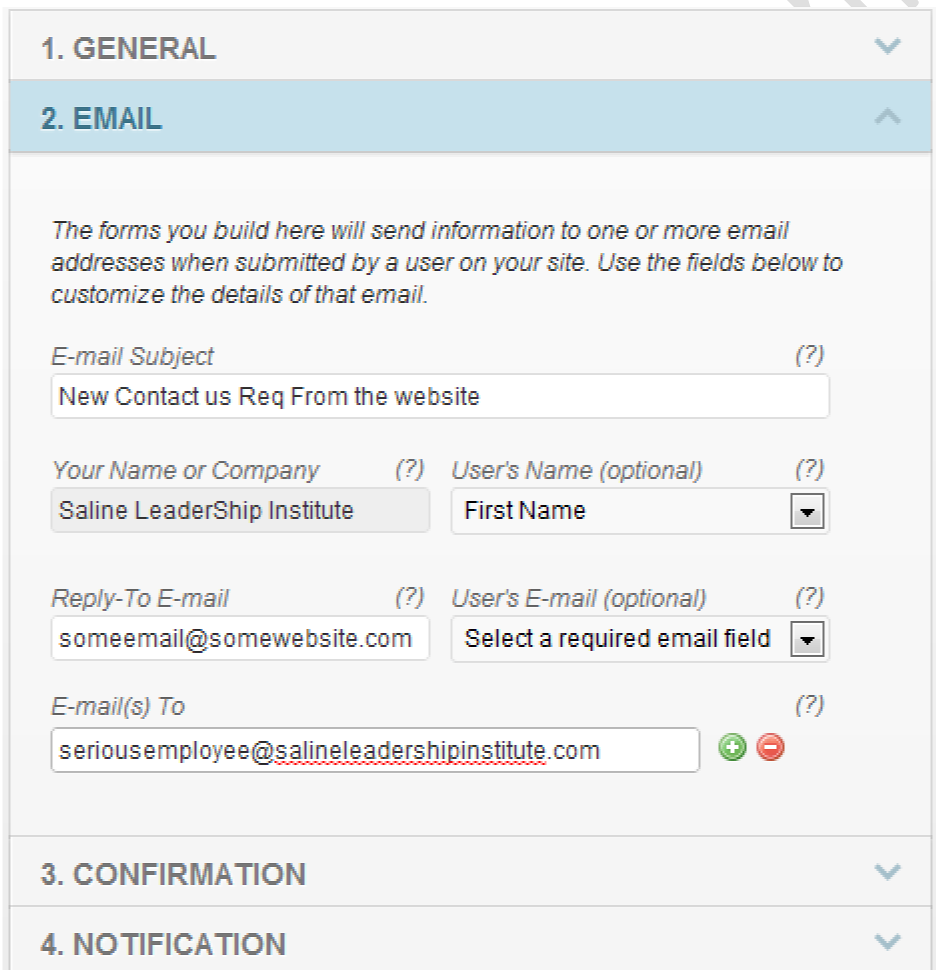
Save the Form by clicking the **Save** button.

To edit the behavior of the form , Click on the **Form Settings** button.

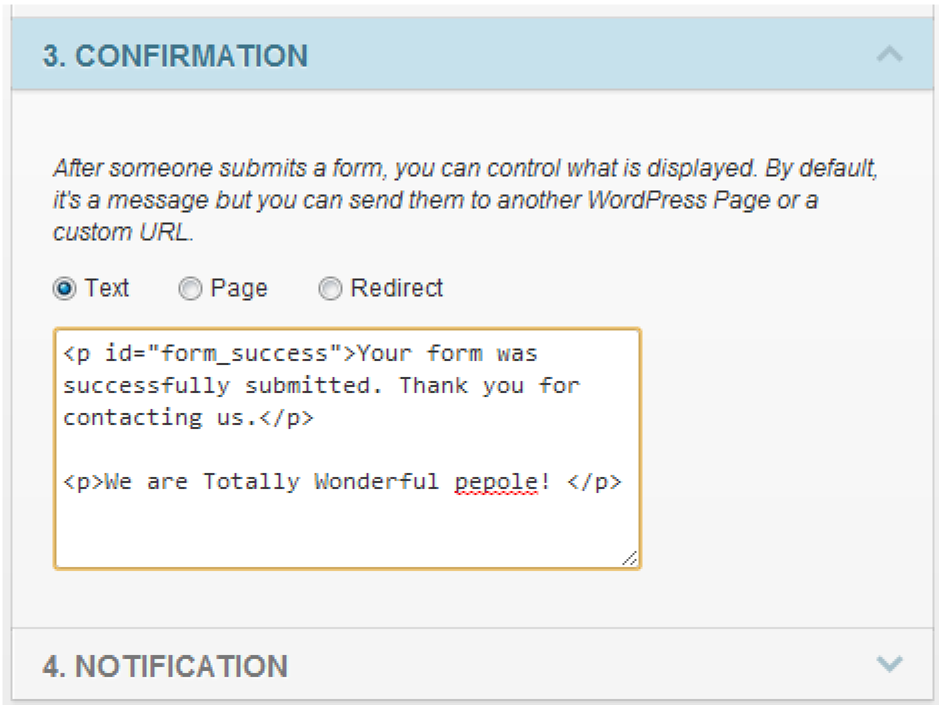


Now you can set the subject line of the email (which will be generated when users submit the form we created), Reply to Email Address, **To Email Address** (*to which the email will be going to*) etc.

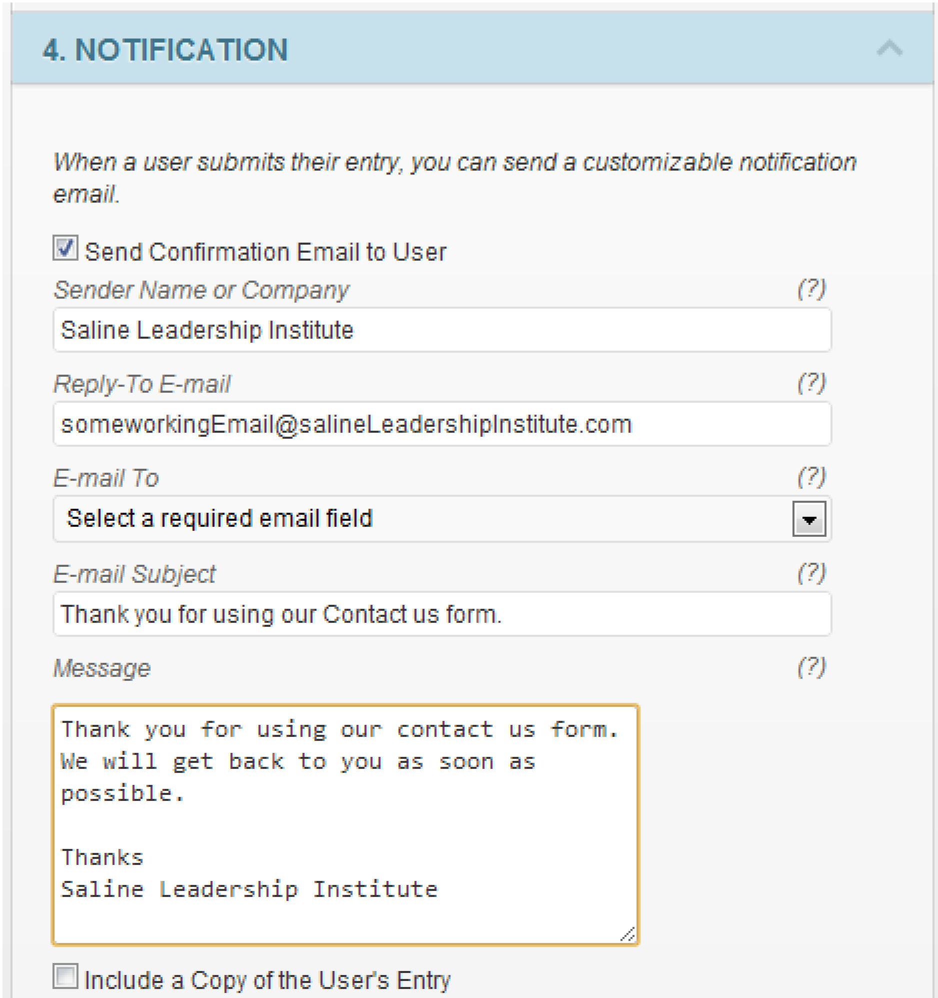
mp 2012



The Confirmation tab will allow us to set the behavior of the Thanks page user will be seeing after submitting the page. You can set a custom Text which user will be seeing or show another page etc…

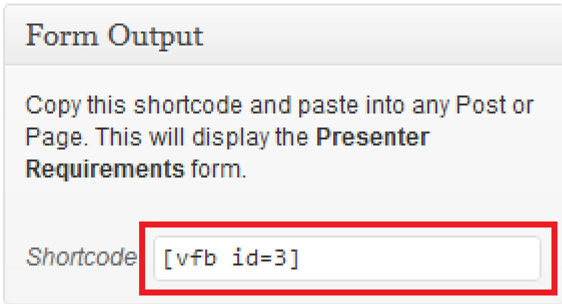


If you want to send a confirmation email to the user, you can set it in the last step. This is an opton step. You can customize the Sender Name, Reply to email, Subject line and the content of the email etc.



Click the **Save** button to Save the changes we made

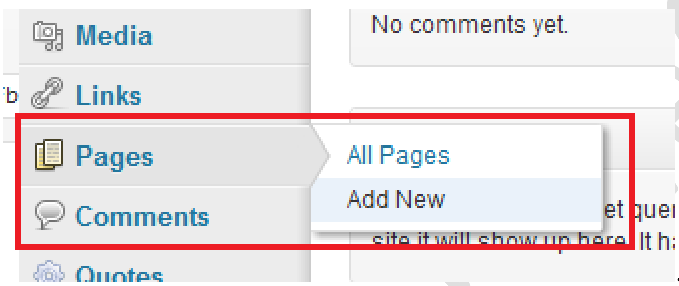
Just below the form element Item box, You can see a "Form Output" box where it displays a **shortcode** for our form. Copy the shortcode. We will be using this shortcode to embed (include) our form in a page later.



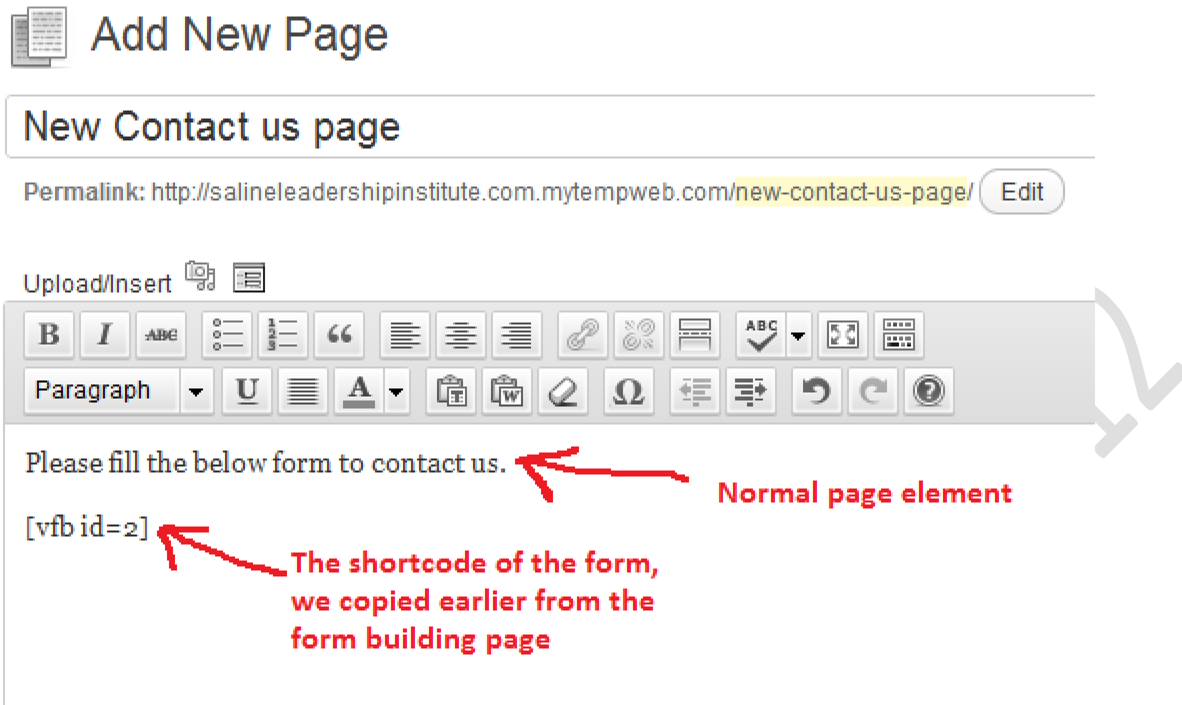
CREATE A PAGE TO HOLD THE FORM

Now our Form is ready, we need to create a page which holds this page.

Go to Dashboard and Select **Pages->Add New**



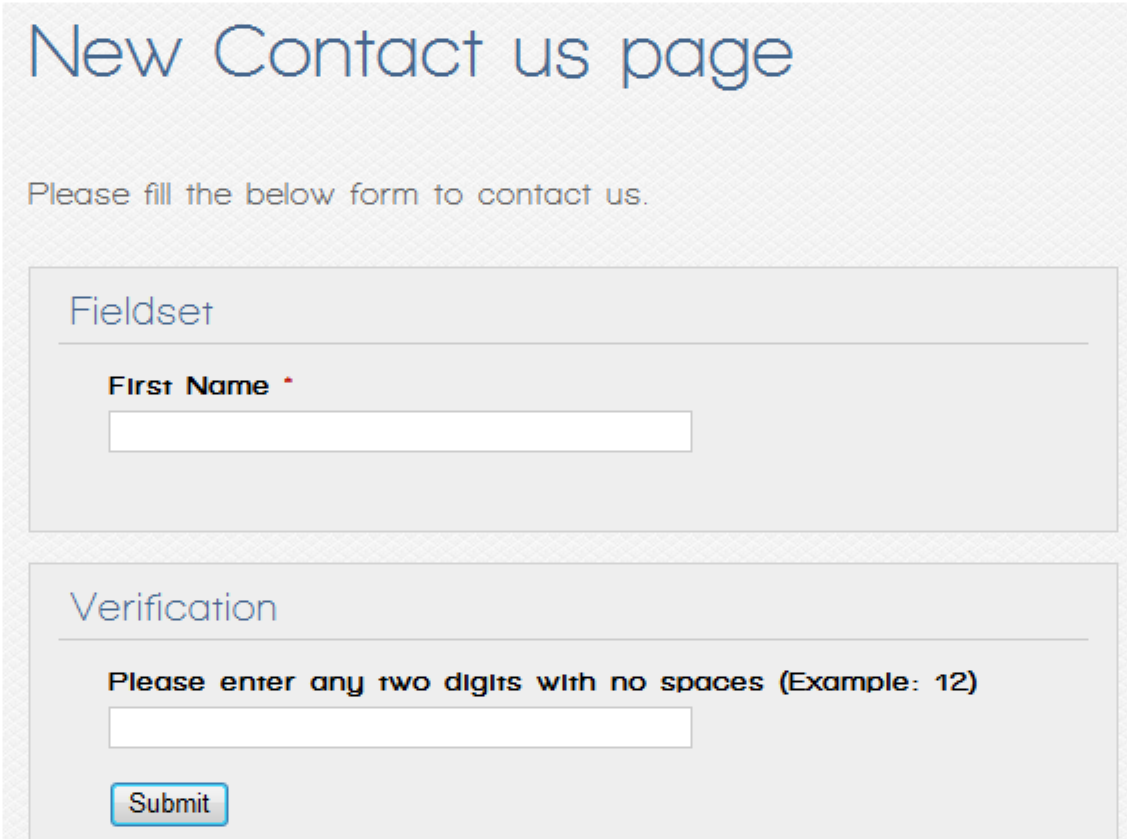
You can add content to the page as you wish . Paste the **shortcode** for the form we copied earlier from the form builder page and paste it to the page. When the page the page renders, the **shortcode** will be transferred as the form we built.



Publish the Page.

You will see “Page published” message along with the “View page” link, clicking on which lets you to see the newly created page.

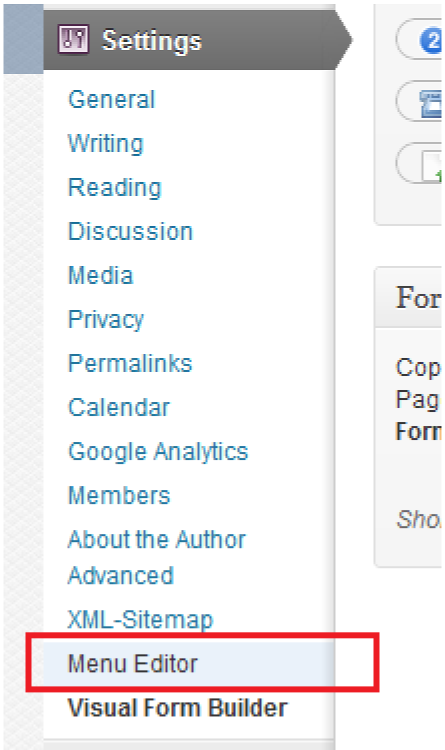
And the page will have our new form.



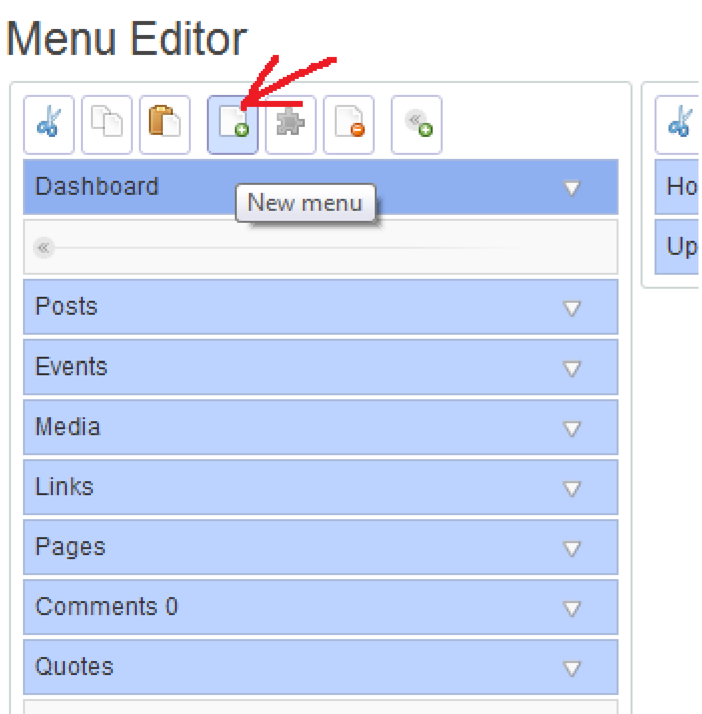
ADDING A LINK TO THE DASHBOARD.

We can add a link to the admin dashboard for authorized users to access the new page we created.

Go to the Admin Dashboard and select **Settings-> Menu Editor**

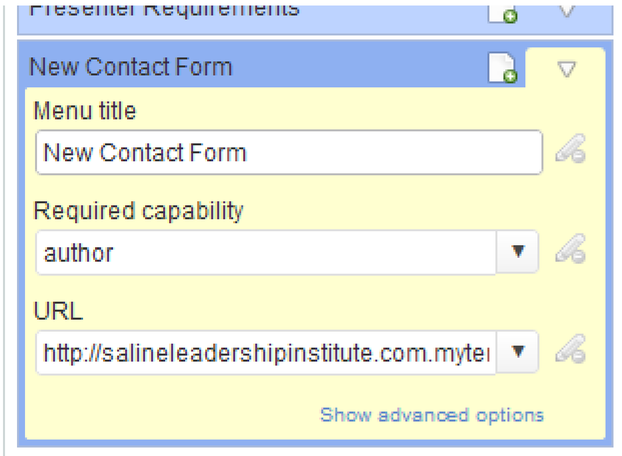


It will show the Menu editor page where it lists all the admin menus available in the Dashboard. To add a new menu item for our page, Click on the **New menu** icon.

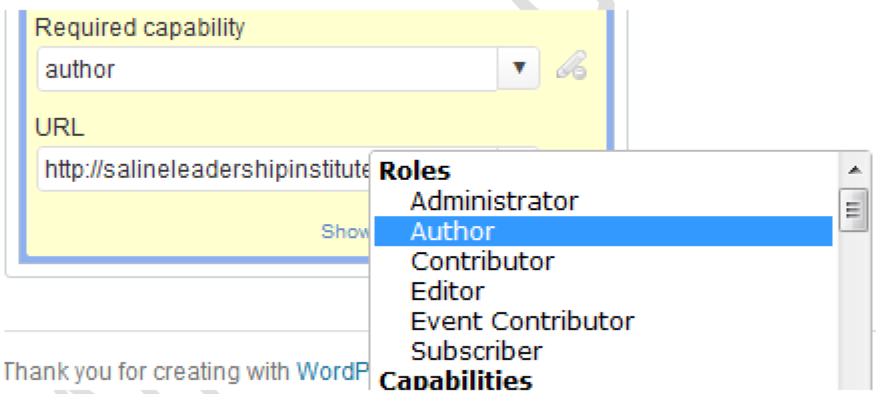


WordCamp 2012

It will add a new Menu designer box to the bottom of the Menu listing (you may need to scroll down to see it) . You can give the title of the Menu title and the Required capability and URL. The url should be the absolute url of the page (starts with http://www.salinelea....).

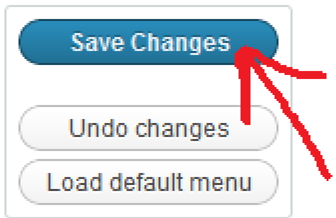


You can set the visibility of this menu item for certain users user groups by selecting desired Required capability. For example , If we select "**author**", The menu item will be visible to user who belongs to the **author** group.

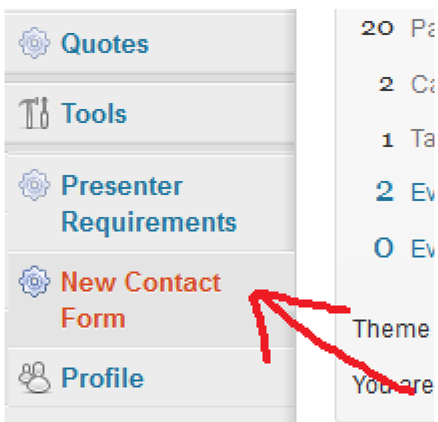


Save the changes by clicking on the **Save Changes** button.

GiveCamp 2012



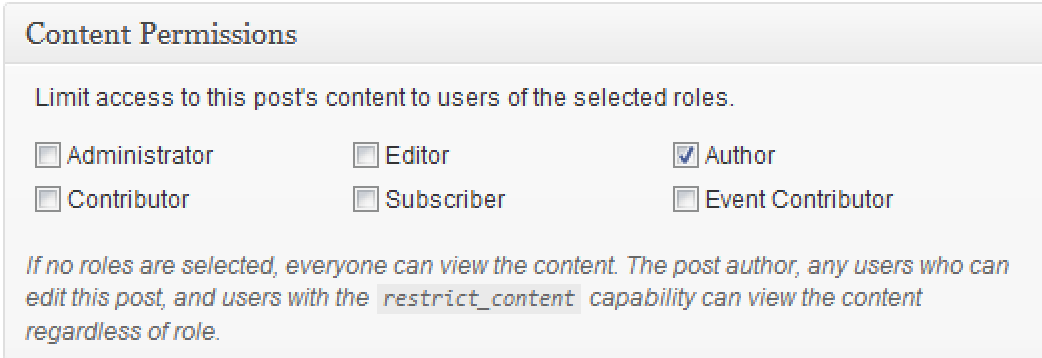
So when a user who belongs to the author group logs in the dashboard, he will see the new link we added to the Dashboard.



SECURING THE PAGE

If you want to secure the new page from other users (since we gave the menu only for authors, we may need to restrict the page access also for authors), We can do that by setting the Content Permission to appropriate audience in the Edit / Create page.

Ann Arbor GiveCamp 2012



Unauthorized users will see the error message in the page.