

Webforms Digital Commons Platform Training

The Digital Commons Webform module was updated in October 2016. This document explains the new functionality that will allow you to make your webforms more engaging and intuitive.

Tips to Developing your Webforms

You now have the ability to make complex forms using conditional logic (if-then statements) to your online forms. That means **if** the user responds to a question in a certain way, **then** they will either see extra or fewer form questions.

- Write or sketch out your webform before you even begin to build it. If using conditional logic, specify the **if** and **then** portions.
- Also, if using conditional logic, write out in plain English what you want it to do. If you are creating the form for another person, get the full functionality clear on paper before you begin building.
- Test out the new form. If you're not sure whether site visitors will understand the form, try it out on your spouse, your mother, and/or your neighbor (not a coworker who already knows what you're trying to do).

New Webform Features

Here are four new functionalities:

- **Form Components** – Adding fields and list sets to create your webforms.
- **Tokens** – Easily customize your email and webform submissions with information gathered from the user form.
- **Email formatting** – we have added ability to custom email formatting so it doesn't appear all in one line or out of sorts.
- **Conditional logic** - allow you to display or hidden information based on user-choices.

Form Components

The following form components have newly added features.

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Date Field

With the date field you can allow users to add dates. Previously, the date field always contained day, month and year. You are now able to customize the date to hide some of these fields. (For example, if you want to capture someone's birthday, but not their birth year, you can simply get the month and day of their birthday.) You can hide either the month/day or month/year.

To only display the month and year, you would click the Day checkbox to hide it. To display only the year, hide the day and month. (Be aware, the month cannot be hidden by itself, since it would not be logical to gather a day and year without the month.)



Checking the Day checkbox in image #1 results in the displayed version, image #2

Spanning Date

To present the site visitor with a span of dates to choose from, use the Validation area of the webform.

For example, to display the 10 prior to present and 5 years in the future, enter -10 for the start date and +5 for the end date. A site visitor would be presented with the date choices of 2006 to 2021 if using the form in 2016, and 2007 to 2022 in 2017.

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Validation

☒ **Required**
Check this option if the user must enter a value.

Start date

The earliest date that may be entered into the field. Accepts any date in any [GNU Date Input Format](#).

End date

The latest date that may be entered into the field. Accepts any date in any [GNU Date Input Format](#).

Textfields

The most commonly used field in a webform is the Text field. The width of the field is now configurable. A first and last name can be added to the User Feedback form using text field, and be appropriately sized, rather than spanning the entire page.

User Feedback

Final results of add first and last name fields

First Name *

Last Name *

Your Message *

Send Feedback

To control the number of characters the site visitor can enter, use the max length field under Validation. To control the width of the field on the page, use the width field under Display.

Validation

☒ **Required**
Check this option if the user must enter a value.

☐ **Unique**
Check that all entered values for this field are unique. The same value is not allowed to be used twice.

Maxlength

← the number will determine the maximum number of characters you can enter
 Maximum length of the textfield value.

Display

Width

← this will determine how many characters wide the field will display
 Width of the textfield. Leaving blank will use the default size.

Email Features

Sending form submissions in email to individuals or to groups

Form owners should receive emails for each form submission. You can add configure the form to send an email either to a group of people or to individuals by adding them in the blank address field then click the Add button.

Form components Conditionals Remote Posts **E-mails** Form settings

Home » User Feedback

✓ Email settings updated.

| SEND | E-MAIL TO | SUBJECT | FROM | OPERATIONS |
|-------------------------------------|--|-------------------------------------|---|---|
| <input type="checkbox"/> | julia.schoenberger@dhhs.nc.gov richard.davis@dhhs.nc.gov joan.plotnick@dhhs.nc.gov | | "NC Division of Medical Assistance" <webmaster.ncgov@its.nc.gov> | Edit Clone Delete |
| <input checked="" type="checkbox"/> | dawain.faison@nc.gov | Form submission from: User Feedback | "NC Division of Medical Assistance" <admin@example.com> | Edit Clone Delete |

☒ **Address:**
← add new email recipient here then click the Add button

☒ **Component value:**

Disabling an email from a user or group.

In order to disable sending a notification to a user, follow these steps.

1. Decide which user you want to disable.
2. Under the operations heading above, click the **Edit** link.

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3. Near the top of the page, click the check box named **Enabled sending** and uncheck it then click the **Save e-mail settings** button.

E-mail to address

☒ **Custom:**

☐ **Component:** Email ▼

Form submissions will be e-mailed to this address. Any email, select, or hidden form

☒ **Enable sending**

Uncheck to disable sending this email.

uncheck to disable

4. You will be taken back to the list of email users and the user you disabled should no longer have a checkbox next to it.

Removing a user from a group

A group has more than user included in the email field separated by a comma. Here is an example of a group.

| SEND | E-MAIL TO | SUBJECT | FROM | OPERATIONS |
|--------------------------|--|---------|---|---|
| <input type="checkbox"/> | julia.franks@dhhs.nc.gov richard.zebra@dhhs.nc.gov joan.rivers@dhhs.nc.gov | | "NC Division of Medical Assistance" <webmaster.ncgov@its.nc.gov> | Edit Clone Delete |

Group email

1. Decide which user you want to remove from the group. In this example, we will remove Julia Franks.
2. Under the operations heading above, click the **Edit** link.
3. In the custom label you will find all of the users. Remove Julia Franks email address, then click the **Save e-mail settings** button.
4. You will be taken back to the list of email users and the email for Julia Franks should no longer be in the list.

Customizing the email template

Drupal generates email for each form submission. A confirmation email can be sent to the site visitor and can also be sent to the website manager(s).

For both of these kinds of email, you can use the Email Template to format the email that is sent, to make it easier to read.

While are able to most all HTML tags in the email template, the following common HTML tags can be used in the Email Template to style your user email:

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| Commonly used html tags for email template | |
|--|----------------------------|
| <h1> - <h6> | Heading |
| <p> | Paragraph |
| <i> | Italic |
| | Bold |
| & | Unordered List & List Item |
| <hr> | Horizontal rule |

To add an HTML tag **** and **<hr>** to bold the headers, follow the example below.

Added HTML markup

E-mail template

An e-mail template can customize the display of e-mails.

Custom template ▼

Markup to display this sentence bolded

<p>Good morning [submission:values:name]!!! We will mail your check for \$3,000.00 to the following email address[submission:values:email]</p>

Is this correct?

<h3>Submitted on:</h3> <i>[submission:date:long]</i>

<h1>Submitted by user:</h1> <h2>[submission:user]</h2>

<hr>

Submitted values are:
[submission:values]

Creates a horizontal rule

Browse available tokens.

☒ Send e-mail as HTML

☐ Include files as attachments

Ensure you check the "Send e-mail as HTML" so your email will include the formatting.

Results of added HTML markup

Form submission from: User Feedback



webmaster.ncgov@its.nc.gov on behalf of NC Department of Health and Human Services <noreply@dhhs.nc.gov>

 Action Items

Good morning Peyton Manning!!! We will mail your check for \$3,000.00 to the following email address **dawain.faison@gmail.com**

Is this correct?  **results of bolded HTML tag **

Submitted on:

Monday, October 31, 2016 - 10:27 am

Submitted by user:

Horizontal Rule results <hr>

digital-admin

Submitted values are:

name Peyton Manning

Email dawain.faison@gmail.com

Who is Dawain Faison

Your Message this is a test to see if the formatting will be displayed

Page Submitted /user-feedback

The results of this submission may be viewed at: <https://ox.dhhs.stage.nc.gov/node/202/submission/5320>

Site Visitor email confirmation

To ensure that the user who is filling out the form receives a confirmation emails follow these steps:

1. Under the Webform link, click the **Form components** link and go to the last field (which will be empty).
2. Place your cursor in the field and type the word **Email** or some text that will prompt user to add their email.
3. Select the drop down menu and select **E-mail** so that the field will check to make sure email format is validated.
4. Since we want the user to receive a confirmation email, check the **Required** check box, then click the gray **Add** button. This will create the email field. Now we will make some configuration changes so the site visitor will receive their confirmation email.
5. Click the **Webform** link
6. On the charcoal gray admin bar, click the **E-mails** link.
7. Select the **Component Value** radio button instead of the Address radio button (which is selected by default).

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8. Select the **Email** (or text used to represent email) from the select dropdown, then click the gray **Add** button. This will take you to the Email configuration.

Home » User Feedback

| SEND | E-MAIL TO | SUBJECT | FROM | OPERATIONS |
|-------------------------------------|--------------------|---|--|---|
| <input checked="" type="checkbox"/> | Value of "Email" | Your form submission data from: User Feedback | "NC Department of Health and Human Services" <noreply@dhhs.nc.gov> | Edit Clone Delete |
| <input checked="" type="checkbox"/> | Value of "Who is " | Form submission from: User Feedback | "NC Department of Health and Human Services" <noreply@dhhs.nc.gov> | Edit Clone Delete |

☒ Address: email@example.com

☒ Component value: Email

> CAPTCHA: no challenge enabled

[Save](#)

The address radio button is selected by default. Check the Component Value radio button, then choose Email or the field name you chose to represent the email field.

9. Under the Email to address heading, select **Component** radio button. Your email field should already be selected in the drop-down menu.
10. The default settings under each of the headings, should be acceptable.
11. Unless you need to update the Email template, click the gray **Save email settings** button.

Page Break

Page breaks allow you to break up very long forms into smaller subsections, as well as group related information, so it displays in a more organized manner. Combined with the use of Conditional Logic, page breaks allow you to create forms that are easy for your site visitors.

What is new? In the previous version, the only conditional logic available was built inside of the page break, which in some cases was limiting. The new version allows for more flexibility to display page based on user choices.

go to football game

go_to_football_game

Page break

favorite football team

favorite_football_team

Select options

what sandwich do you want

what_sandwich_do_you_want

Select options

get more option specifics

get_more_option_specifics

Page break

what did you like about option 1

what_did_you_like_about_opt...

Textarea

Page breaks are bolded

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Select options

Aside from the text field, you will find the select options to be an important field to add to your webforms. They allow site visitors to select from a dropdown list of preset options from radio button (only one choice can be made) or checkboxes where multiple items can be selected.

Multiple: Enable the checkbox if you want the site visitor to be able to select more than one option.

Here is an example of the markup needed to produce the select box.

- **Options:** List of value options; note, you must enter these options using the following structure using Key pairs. One part of the option is used for the database, the other is what the user will see on the site.



☒ **Multiple** ← **this will allow the site visitor to check multiple options**
Check this option if the user should be allowed to choose multiple values.

Options *

- 1|Apple
- 2|Oranges
- 3|Plums
- 4|Grapes

Key-value pairs MUST be specified as "safe_key|Some readable option". Use of only alphanumeric characters and underscores is recommended in keys. One option per line. Option groups may be specified with <Group Name>. <-> can be used to insert items at the root of the menu after specifying a group. [Browse available tokens](#).

Here are the results selecting the Multiple checkbox on the webforms:



What is your favorite fruit *

- ☐ Apple
- ☐ Oranges
- ☐ Plums
- ☐ Grapes

Here is the display results

- **Display > Listbox:** Displays select options as a select list box instead of as radio buttons or checkboxes; option groups (nested options) are only supported with this option



- **Display > Randomize options:** Randomizes the order of the options, causing them to display for the site visitor in a different order than was entered in the Drupal interface. This can help to minimize user bias.

Tokens Add Personalization to Forms

Tokens are specially formatted chunks of text that serve as placeholders for a dynamically generated value (variables). This is similar to Microsoft Word mail merge.

For example, tokens can be used to display a personalized submission message at the completion of the web form, by addressing the site visitor by name. We will accomplish this by adding their name, instead of just saying "Thank you", you can say "Thank you, Andrew Luck".



The image below is the result of using a value token translated base on the information provided by the user.



Use these steps to add a first and last name field:

1. Make sure you are logged in, go to your User Feedback Page form.
2. Click the **Webform** tab. The form Component field will be displayed.
3. In the Label field type *First Name* in the New Component Name field.

User Feedback

View Edit **Webform** Results Clone

Form components Conditionals Remote Posts E-mails Form settings

Home » User Feedback

| LABEL | FORM KEY | TYPE | VALUE | REQUIRED | OPERATIONS |
|----------------|----------------|----------|--------------|-------------------------------------|-------------------|
| Your Message | your_message | Textarea | - | <input checked="" type="checkbox"/> | Edit Clone Delete |
| Page Submitted | page_submitted | Hidden | [node:title] | | Edit Clone Delete |

New component name: Textfield ☐ Add

Save

1 - Add a field label named first name **2 - click the Add button**

4. Under the Type heading, ensure Textfield is selected.
5. Under the Required heading check the box to make this field required, then click the **Add** button. You can now customize the properties of the First name field.
6. Go to the Validation heading and make sure that Required is still checked.
7. In the Maxlength field, enter any number you want. A good number is 25. The maxlength is the number of characters that will be allowed in the field.
8. Go to the Display heading and look at the Width field. The width field will determine how wide the field will appear. A good rule of thumb is to make the Maxlength and Width field the same.
9. Leave everything else as default and click the **Save Component** button.
10. Add the Last Name field next, by repeating steps 4-10.

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11. After you have created the first and last name fields, move the first name to the top of the page and last name just below using the Drag tool highlighted, then click the Save button to maintain the field order.

1 - Drag the first name field to the top of the page and the last name field below

| LABEL | FORM KEY |
|----------------|----------------|
| First Name* | first_name |
| Last Name* | last_name |
| Your Message | your_message |
| Page Submitted | page_submitted |

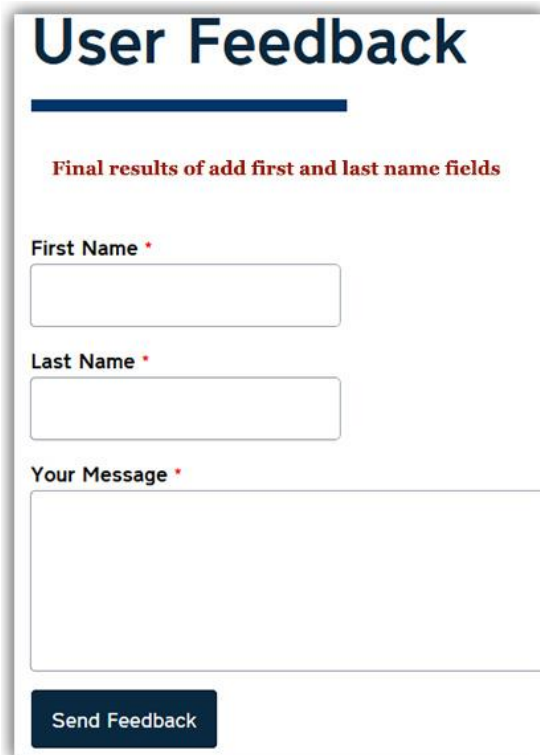
Drag to re-order

New component name

Save ← **click the Save button to keep the order of the fields**

12. Now under the Form key head, note the exact form key name (**first_name**, **last_name**) so you can reference need them later.

13. Under the **User Feedback** heading at the top of the page, click the **View** link to see what you have created.

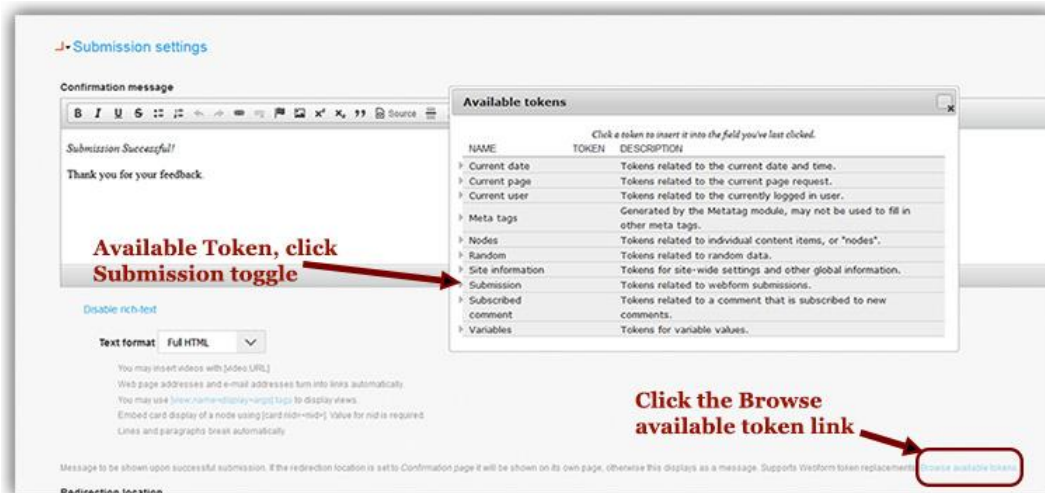


The screenshot shows a form titled "User Feedback" with a dark blue header. Below the header is a red line of text: "Final results of add first and last name fields". The form contains three input fields: "First Name *" (with a red asterisk), "Last Name *" (with a red asterisk), and "Your Message *" (with a red asterisk). At the bottom of the form is a dark blue button labeled "Send Feedback".

Applying Form Key to the token variables

Now that you have added some fields to work with, you can reference them using tokens.

1. On the dark grey bar under the User Feedback heading, click the **Form settings** link. You will see the Submission settings page.
2. Just above the Redirection location heading, toward the right of the page, click the **Browse available tokens** link. This will display the Available tokens window.



The screenshot shows the "Submission settings" page. The main content area has a "Confirmation message" section with a "Submission Successful!" message and a "Thank you for your feedback." message. Below this is a "Text format" dropdown set to "Full HTML". A red arrow points to the "Available Token, click Submission toggle" link. To the right, an "Available tokens" window is open, showing a table of tokens. A red arrow points to the "Browse available tokens" link at the bottom right of the page.

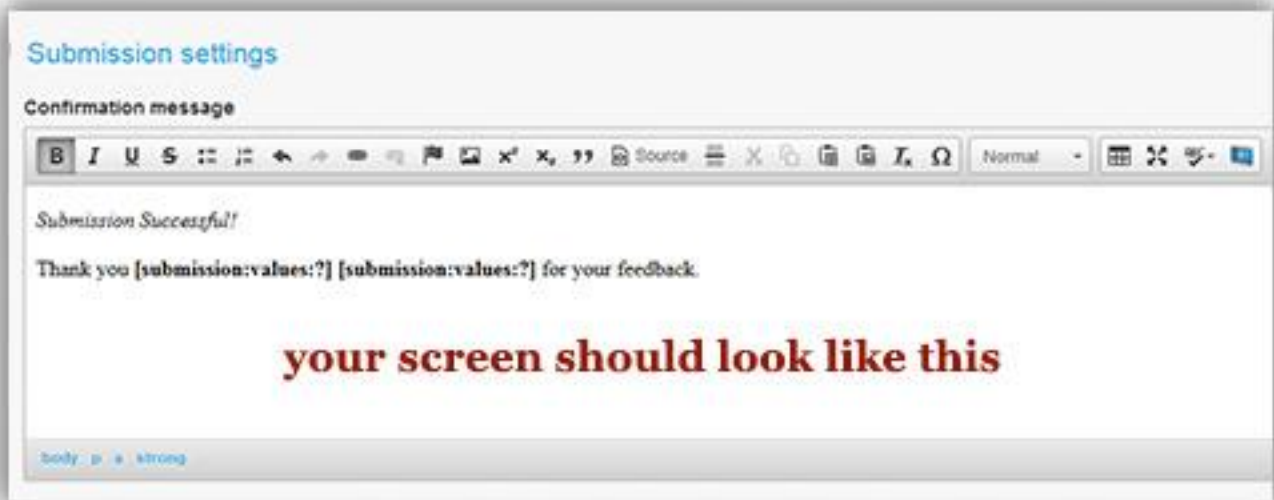
| NAME | TOKEN | DESCRIPTION |
|--------------------|----------------|--|
| Current date | [current-date] | Tokens related to the current date and time. |
| Current page | [current-page] | Tokens related to the current page request. |
| Current user | [current-user] | Tokens related to the currently logged in user. |
| Meta tags | [meta-tag] | Generated by the Metatag module, may not be used to fill in other meta tags. |
| Nodes | [node] | Tokens related to individual content items, or "nodes". |
| Random | [random] | Tokens related to random data. |
| Site information | [site] | Tokens for site-wide settings and other global information. |
| Submission | [submission] | Tokens related to webform submissions. |
| Subscribed comment | [comment] | Tokens related to a comment that is subscribed to new comments. |
| Variables | [variable] | Tokens for variable values. |

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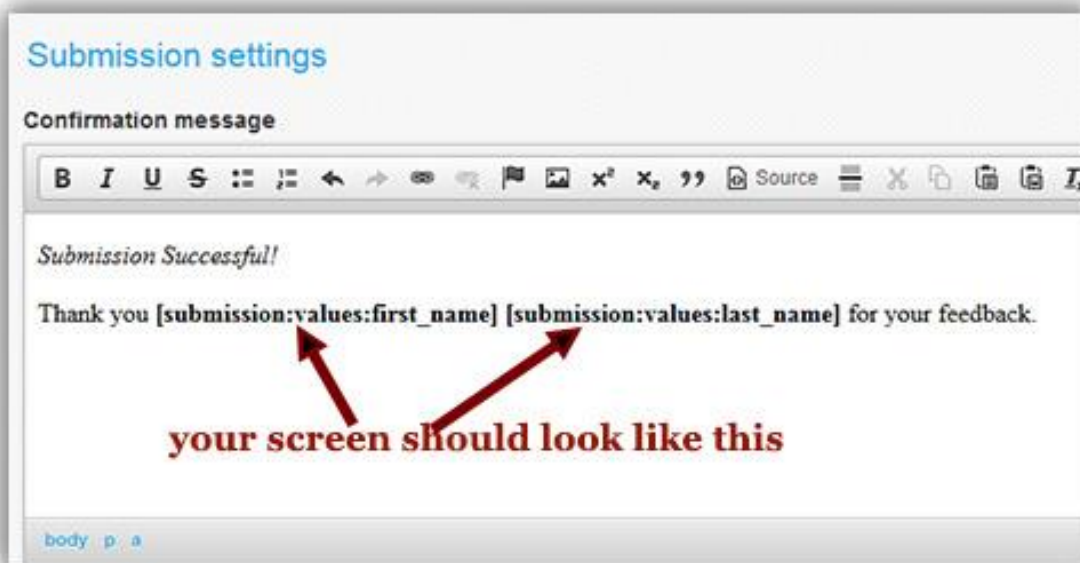
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3. Since we want to display the first and last name on the Confirmation Screen, we will click the **Submission** toggle to expand the options.
4. We want to display the submission values on the confirmation screen when the submit button is clicked, so we will copy the token value `[submission:values:?]` two times between so it reads "Thank you `[submission:values:?]` `[submission:values:?]` for your feedback."



Note: You can move your cursor over the Available Token window to move it so you can paste the token information.

5. Once you have copied the token in the confirmation message window, close the Available token window by clicking the box on the right side of the window with the X in it.
6. On the Confirmation message WYSIWYG field, add in the the token values that you copied. For reference here they are: **first_name** , **last_name**. To do this, replace the question mark (?) in the `[submission:values:?]` value with first name, then repeat the same step in the second token using last name, so that it reads. `[submission:values:first_name]` `[submission:values:last_name]` .



7. Click the blue **Save Configuration** button at the bottom of the page.

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8. This completes the configuration of the confirmation screen. **Note:** The Emails setting has not yet been configured.
9. To test the confirmation screen, click the View link on the forms Component screen to view the webform.
10. Type in your first and last name, then click the Send Feedback button. You should see a screen that displays your name.

Conditional logic

One of the most important updates was the ability to use conditional logic. Here are a few new benefits of using conditional logic.

What is conditional logic?

Conditional logic allows you to show and hide fields or sections of your web form based on a user's actions. It is a great way to keep forms compact and user-friendly, while ensuring that you gather all of the information you need.

- Create interactive forms that react to user's actions.
- You can dynamically show, hide, or change the display
- Skip entire pages if you use multi-page forms based on user choice

For example, if a user selects "Other" from a select list of pre-defined topics, you can use conditional logic to add a "Please Specify" free entry text field. Optionally, you can make it a required field so that the user has to fill in his/her custom topic.

Conditional Rules are composed as IF <condition> THEN <action> statements. A conditional statement can have multiple IF conditions (If this and that or something else) using and/or logic to define the state. If the form state matches the IF condition(s), then all defined actions will be applied.

Conditional logic can:

- Conditionally show a field
- Show a section/list

Here is an example of how the conditional logic works below.

Writing the logic in plain English on paper, so you can visualize how to program it. (see image below)

IF a user selects Yes to the question "do you play football?" (logic #1, display #1), THEN show the question "what position do you play"(logic #2, display #2).

The conditional logic

The screenshot shows a webform configuration interface for conditional logic. It consists of two rows. The first row is labeled 'If' and contains three dropdown menus: 'do you play football?', 'is', and 'Yes'. A blue arrow labeled 'logic #1' points to the 'Yes' dropdown. The second row is labeled 'then' and contains three dropdown menus: 'what position do you play', 'is', and 'shown'. A blue arrow labeled 'logic #2' points to the 'shown' dropdown. To the right of each row are small icons for adding, deleting, and moving rules.

The results of the logic

The screenshot shows the results of the conditional logic. It displays two sections. The first section is titled 'do you play football? *' and has two radio button options: 'Yes' and 'No'. A blue arrow labeled 'display #1' points to the 'Yes' option. The second section is titled 'what position do you play *' and has six radio button options: 'Quarterback', 'Full Back', 'Tailback', 'Corner Back', and 'Head Coach'. A blue arrow labeled 'display #2' points to the 'Full Back' option.

Creating a Multi-page webform

Multi-step or multi-page webform pages are really good to break up long webforms. It does take a little planning though (alot of planning) if it is a long form), since you will need to group the information for each page and order each page appropriately if you are integrating conditional logic. With that said, done properly you can bypass certain pages altogether based on user choices. The biggest benefit is the user will not have to think about what questions they should answer and not be subjected to reading alot of side notes that are usually accompanying with long forms that do not use any type of conditional.

Here is an example of a simple webform layout that has been developed that routes a user based on where they participate in tailgating.

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Webform Layout

Form components Conditionals Remote Posts E-mails Form settings

Home » What you do at football game

| LABEL | FORM KEY | TYPE |
|-------------------------------------|--------------------------------|----------------|
| Name | name | Textfield |
| Email address | email_address | E-mail |
| Do you tailgate before the game? | do_you_tailgate_before_the_... | Select options |
| Why dont you particpate | why_dont_you_particpate | Page break |
| Reason for non-participating | reason_for_non_participating | Textarea |
| Activities | activities | Page break |
| What activities do you participate? | what_activities_do_you_part... | Select options |
| Cooking Items | cooking_items | Select options |

New component name

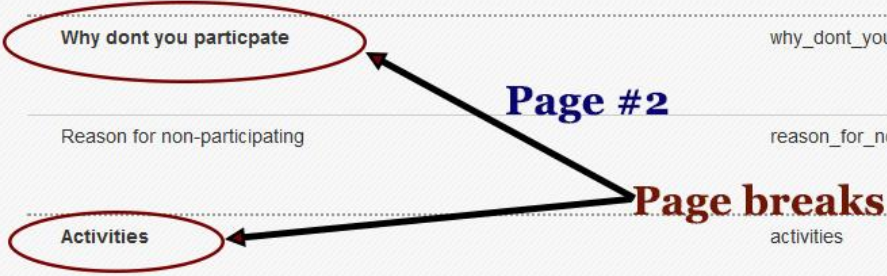
Textfield

Page #1

Page #2

Page #3

Page breaks



Adding necessary conditional logic

In the following image below, there are two pieces of logic in plain words:

Logic #1 - says that if the user chooses **Yes** on page 1 of the webform then skip page two and go to page #3 to answer the next set of questions. If the user answers No, the webform simply goes to the second page. No logic was needed.

Logic #2 - asks what activities the user participates. If they choose GrillMaster as an option, then the Cooking item question appears just below for the user to answer. If they did not choose Grill Master the Cooking item question would not appear for the user to respond.

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What you do before the football game

View Edit **Webform** Results Clone

Form components **Conditionals** Remote Posts E-mails Form settings

[Home](#) » [What you do before the football game](#)

Conditionals may be used to hide or show certain components (or entire pages!) based on the value of other components.

If is then isn't shown

Logic #1

If is then is shown

Logic #2

Add a new condition: +

> CAPTCHA: no challenge enabled

Save conditions

You can make your webform more complex in term of conditional logic. An extremely useful feature of the webforms is it will not let you save the webform if the logic does not validate. In some instances, the conditional logic will validate but not work. This can occur mainly in mulit-page webform when you are attempting to skip pages.

In review:

- **Plan ahead.** For long webforms, sketch all of the questions on a paper in an organized manner. The reason is if your webform become too long, you may need to integrate page breaks.
- **Progress bars.** In general progress bars are excellent feature to use when you have multi-page webforms. It provides a cue for the users of what is to come by adding the page title on top of the page.

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This survey is about what you cook and activities around before the game even starts.



Name

Email address *

Do you tailgate before the game? *

☐ Yes

☐ No

To enable to display the progress bar follow these steps:

1. Click **Webform** located just below the webform title
2. Click **Form settings** located on the grey menu bar, then scroll to the bottom of the document and click the **Progress bar** toggle.
3. Check the **Show progress bar** checkbox, then click the blue **Save Configuration** button at the bottom of the page.

Progress bar

To display progress bar

Progress bar style

☒ Show progress bar

☐ Show page number as number of completed (i.e. Page 1 of 10)

☐ Show percentage completed (i.e. 10%)

☒ Show page labels from page break components

☒ Include confirmation page in progress bar

Choose how the progress bar should be displayed for multi-page forms.

Beware though, if you are using logic that skips pages based a user-decision, then do not use them because, this may cause some confusion in users because they may think the form is broken or they make skipped. Another tip is to keep the title short because it doesn't look good on the webpage and it doesn't wrap well.

- **Make sure the Preview page is enabled.** This provides users the ability to review the information prior to pressing the submit button.

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To display the Preview page on the webform, follow these steps:

1. Click **Webform** located just below the webform title
2. Click **Form settings** located on the grey menu bar, then scroll to the bottom of the document and click the **Preview page** toggle.
3. Check the **Enable preview page** checkbox, then click the blue **Save Configuration** button at the bottom of the page.

Note: Just below on the Preview page title, you can add your own verbiage there as well. Keep it short and sweet.

- **For administrators only, make sure HTML mail system is selected.** This will allow the submission results to be sent in HTML format and will allow you to add other customized tags to the email template.

To verify:

1. On the black administrator toolbar, click **Configuration** link.
2. Under the Content Author heading, click the Webform settings link.
3. Scroll down toward bottom of the page and click the **HTML mail system** checkbox. Another option will appear (hey, they used conditional logic!!)
4. Under the Format heading, click the **HTML** radio button, then click the blue **Save configuration** button.

The screenshot shows the 'Webform settings' page. It includes several sections with checkboxes and radio buttons. Red arrows and text annotations highlight specific settings:

- Use Reply-To header:** Checked. Annotation: "Ensure the HTML mail system is checked. This allows the email get formatted" (with an arrow pointing to the HTML mail system checkbox).
- HTML mail system:** Checked. Annotation: "Ensure HTML is checked, so the email will be sent in HTML format." (with an arrow pointing to the HTML radio button under the Format section).
- Format:** HTML is selected.
- Format override:** Per-webform configuration of e-mail format is selected.
- Progress bar:** Section with several checkboxes. Annotation: "I would uncheck the Show progress bar. You can enable it for each webform" (with an arrow pointing to the Show progress bar checkbox).

Annotations are in red text. Arrows are black.

That's it!! If you have any questions or have questions, feel free to reach out to us.

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