Creating a JotForm with the Free Version

JotForm is an application that allows the user to submit information (registrations, surveys, ballots, etc.) to the form creator and/or others in a simple, straightforward format.
The Wally Byam Airstream Club / Airstream Club International has chosen JotForm to facilitate creation of event registrations that can be integrated into the new Local Club/Region microsites on airstreamclub.org.

Please send all questions to itc@airstreamclub.net

This tutorial contains instructions on how to calculate event fees, but NOT how to process payments. A tutorial containing payment processing is available at itc.airstreamclub.net

A few notes about using JotForm:

Generally the JotForm registration form should echo information about an event that is provided elsewhere, i.e. newsletter, website.   The form may remind users of the fee (per person, per rig, etc.) but it isn't well suited to providing details about an event because that lengthens the form unnecessarily.

Look for "Save" buttons on some functions. If you do not see a "Save" button your work is automatically saved.

JotForm has excellent tutorials at https://www.jotform.com/help/ and their documents are easy to understand. Tech support is very helpful and speedy. Don't hesitate to use it.

It is highly recommend that your first form is a "Sandbox," in which to test the 'Build' elements to see what each does. The Sandbox form can easily be deleted.

Remember, the FREE version allows only 5 'active' forms. Disabled forms do

not count as "active."   The free version allows 100 submissions

per month, but only 10 online payments. For online payments send the rally fee

directly to the club's PayPal account.
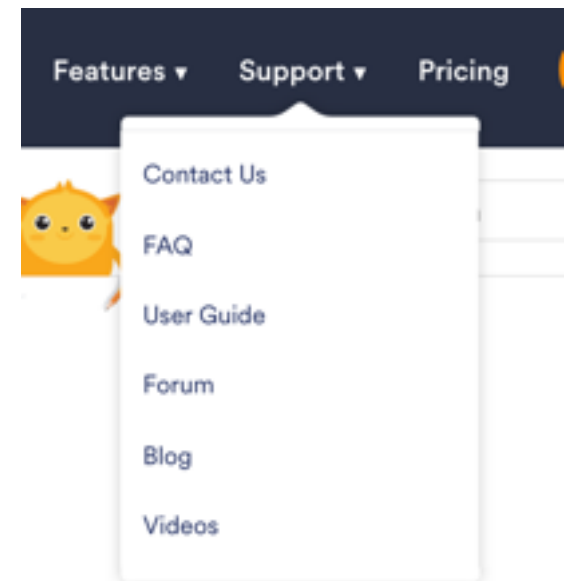
Starting Your Form

- You can start with a JotForm template if you see one that suits your needs.

- Here's an **example** of a JotForm for a rally registration.   Just click the link to view the form.

  https://form.jotform.com/201240840415139

- Sign in to your club's/unit's/region's JotForm account from jotform.com, using your login and password

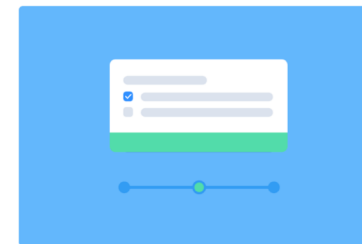Click on Create Form, either using a Template or "From Scratch" and choose your form layout.
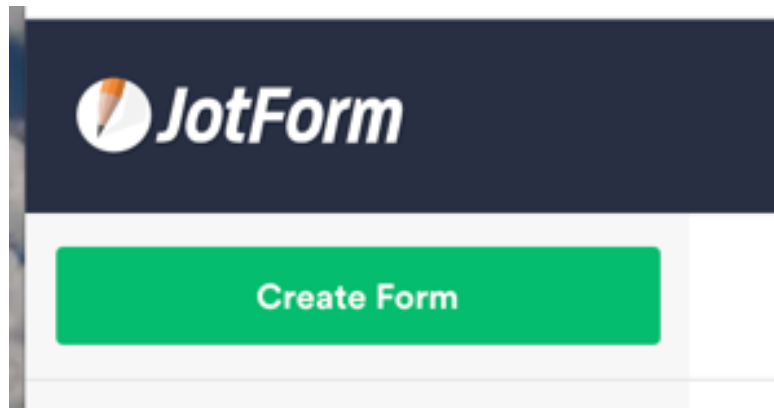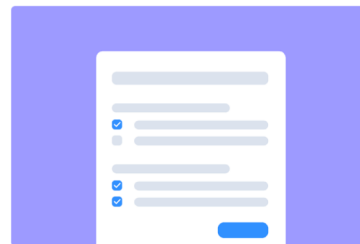
Creating the Form

A Header will appear. Click on the Text and type the name of your form. Include a subtitle if you wish. Remind users_not_ to use Autofill, since can insert unwanted data.
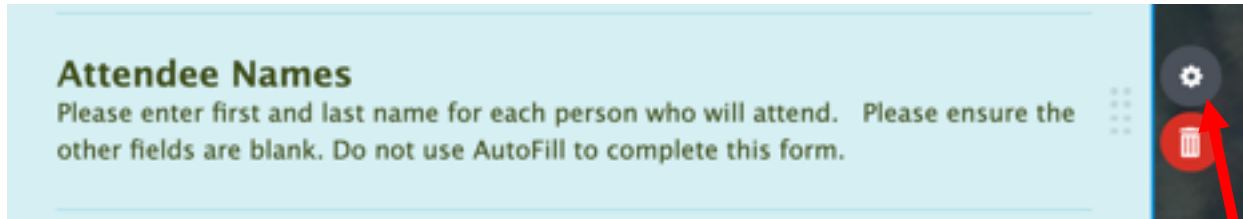
Airstream Club Rally Registration

All changes saved at 10:06 PM ↺

BUILD | SETTINGS | PUBLISH
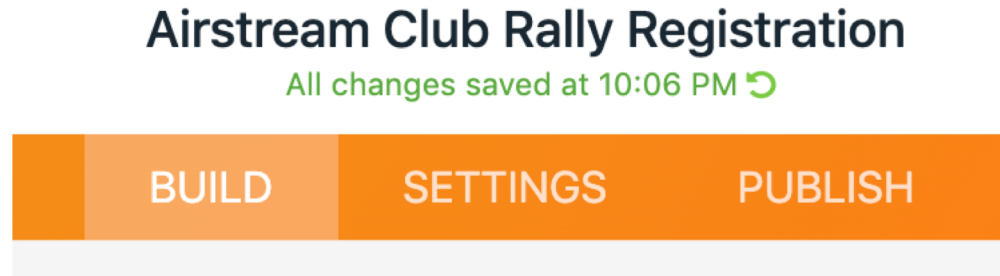
The BUILD tab is where you create/edit the form fields. More about Settings and Publish later.

To ADD an element, click on the "Add Form Element" in the upper left and add Basic fields. *There are many choices. Explore the Widgets as well.*

Add Form Element +
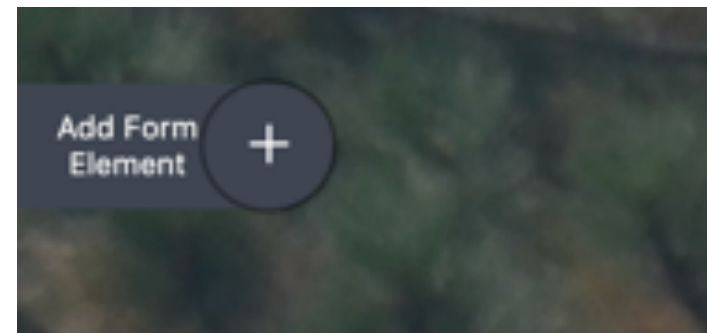
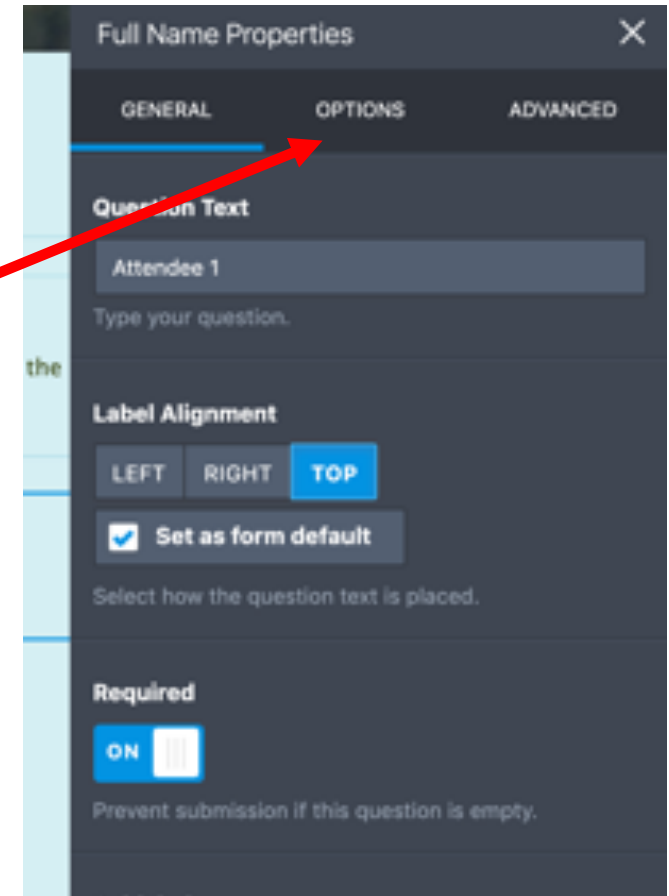A TEXT field is designed to provide information or instructions to the user.

Attendee Names
Please enter first and last name for each person who will attend.   Please ensure the other fields are blank. Do not use AutoFill to complete this form.

To change how a field operates, **click on the field,** then the "gear icon."
(Properties) will appear. This is also where you make a field "required."

Be sure to explore the "Options" menu as well. Each type of field has different options, i.e. multiple choices, size of response box.

To delete the field, use the red Trash Can icon.

Full Name Properties ✕

GENERAL   OPTIONS   ADVANCED

Question Text

Attendee 1

Type your question.

Label Alignment

LEFT   RIGHT   TOP

☑ Set as form default

Select how the question text is placed.

Required

ON

Prevent submission if this question is empty.

Edit fields to suite your form needs.

A Text field was added to provide a host's name and contact information plus **registration deadline in the text box.** Put this information anywhere in the form you wish.

Add fields if additional information is desired, i.e. address, arrival date, Big Red Numbers, children attending. Some clubs find it helpful to ask, "Is this your first event with x Airstream Club?" so new/visiting members can be introduced.

It's not necessary to have every participant's name in a separate field, unless there are different options for each participant (entrees, adult/child, etc.) You may want to use a short text entry for that information.

Changing field order

Each field has an eight–dot "handle' on the right side. Click on the handle and drag the field where you want it.

This can be done at any time, even after the form is published, but preferably before taking submission, since the field order determines the order of columns on the spreadsheet.
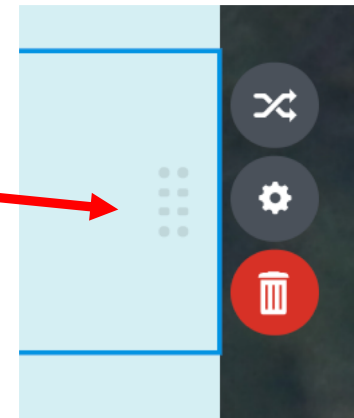
For any questions or more information, please contact

Host Name

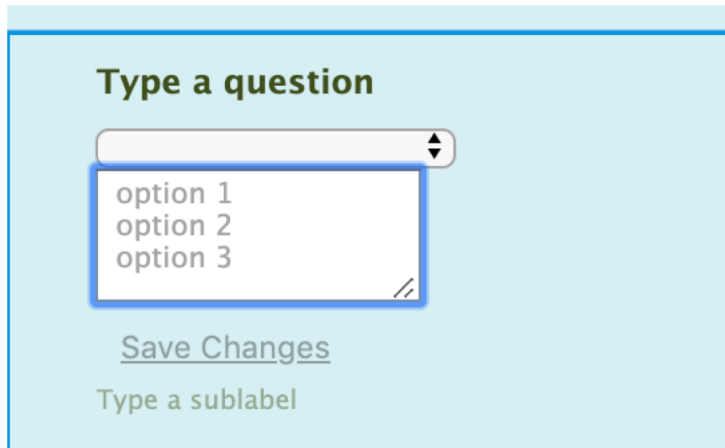Host Phone

Host Email

REGISTRATION DEADLINE IS:

If you are creating a JotForm with OPTIONS, read on. If not, skip this section.

For some events you may need to explain possible options by editing or creating the Dropdown field. Single Choice fields work the same way.
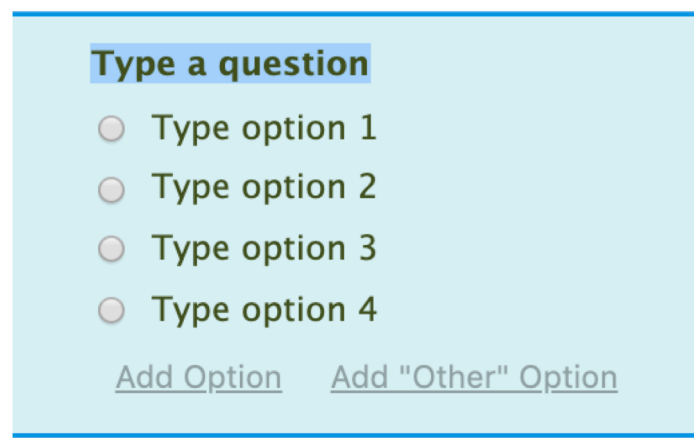
With luncheons you may have to do this for each attendee if there are different options for each participant (entrees, adult/child, etc.)

Dropdown Field

Type a question

option 1
option 2
option 3

Save Changes

Type a sublabel

Single Choice Field

Type a question

○ Type option 1

○ Type option 2

○ Type option 3

○ Type option 4

Add Option   Add "Other" Option

Click on the description of options (ex. chicken, beef, vegetarian) or an Adult/Child option to add text. Include price to remind users.

Entree 1 *

Sandwich with fries
Chicken Tortilla Wrap
with fries
Greek salad

Save Changes

Type a sublabel

1. Adult, Youth, or Child? *

Adult $27
Youth (7-11) $13
Child (3-6) $10

Save Changes

Type a sublabel

The Dropdown or Single Choice field can be use for # nights camping or any other option, i.e. activities, type of campsite, etc.

How many nights will you be attending? ($30 per night)

1 night - $30
2 nights - $60
3 nights - $90

Save Changes

Type a sublabel

Creating "Options" for users. The best elements are "Dropdown," "Single Choice," or "Multipe Choice."

Describe the Options under "Properties" (gear icon) -> "options" (tab).
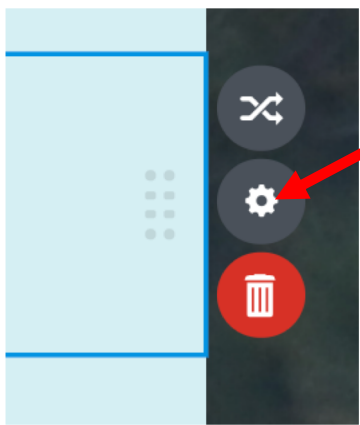
If using the options to total fees,

switch ON "Use Calculation Values."

If no money is being calculated, leave it OFF.

Options

1 night - $30
2 nights - $60
3 nights - $90

Type your options to select from. Separate each on a new line.

Predefined Options

None	▼

Quickly add frequently used options, such as days of the week.

Selected by Default

	▼

Choose an option to be selected by default.

Use Calculation Values

ON
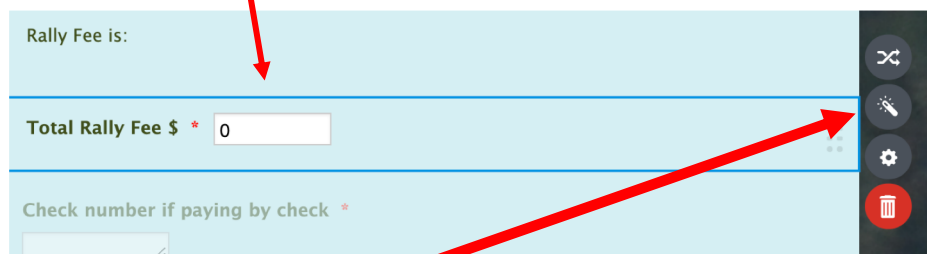
Define values to be used in calculations.

Calculation Values

Empty Option	
1 night – $30	30.00
2 nights – $60	60.00
3 nights – $90	90.00

HOW TO CALCULATE FEES.

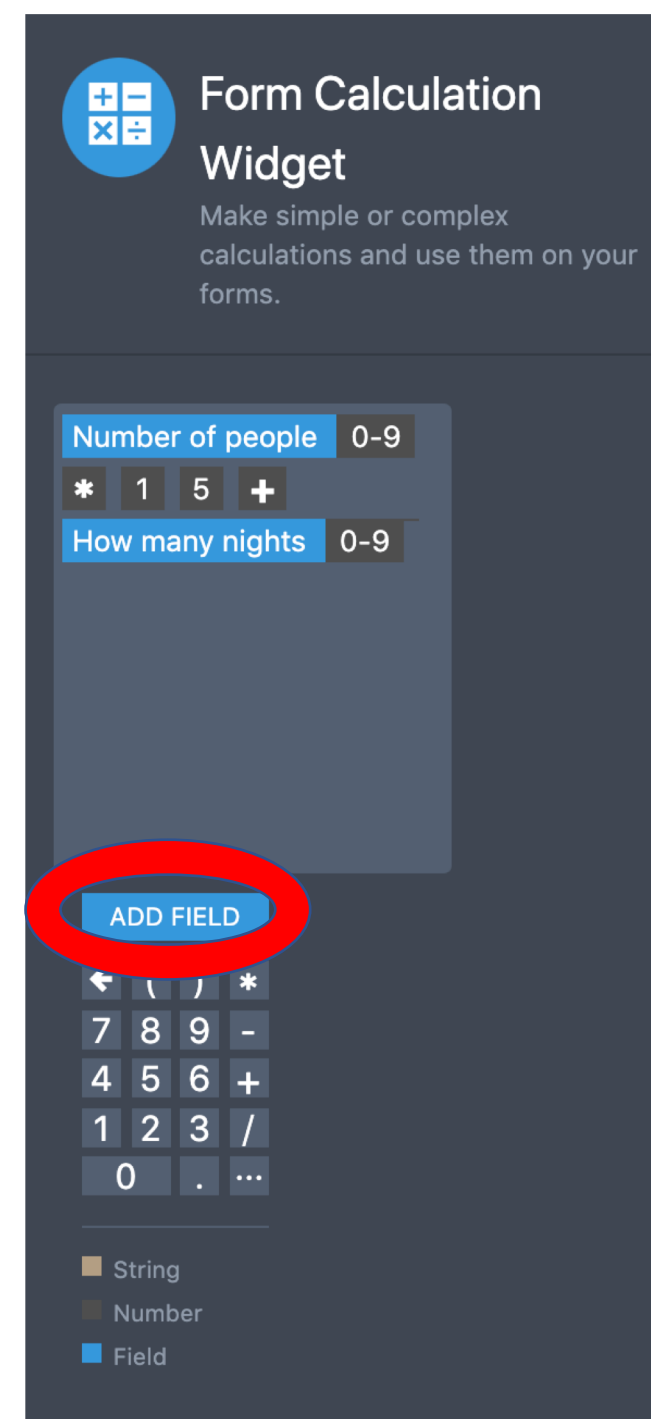Add a "Form Calculation Field, " a **Widget** added from the Form Elements.

Click on the "Wizard Wand" to open the Calculation Widget.

Use "Add Field" to specify which field's value will be added to the equation and the "keyboard" below to enter the mathematical functions. Use the Left Facing Arrow to delete a field or function.

In the sample Template the sample calculation adds the $15 per person rally fee to the # of nights camping fee the user has chosen.

The Calculation will vary with each event. Be sure to have several people **test** the form thoroughly, choosing all combinations of options before you activate the payment module. These tests will show up as submissions, which is fine.

SAVE! SAVE!

Form Elements

BASIC   PAYMENTS   WIDGETS

Search a Widget

E-Signature

Form Calculation

Form Calculation Widget

Make simple or complex calculations and use them on your forms.

Number of people   0-9

*   1   5   +

How many nights   0-9

ADD FIELD

← ( ) *
7 8 9 −
4 5 6 +
1 2 3 /
0 . ...

■ String
■ Number
■ Field

Rally Fee is:

Total Rally Fee $ * 0

Check number if paying by check *

Field Settings

"Form Status" allow you to disable the form automatically on a specific date, number of submissions, or both.

"Conditions" (among other options) allows fields to be shown or hidden, depending on the previous choices the user has made. The Conditions wizard is very intuitive.   Explore.
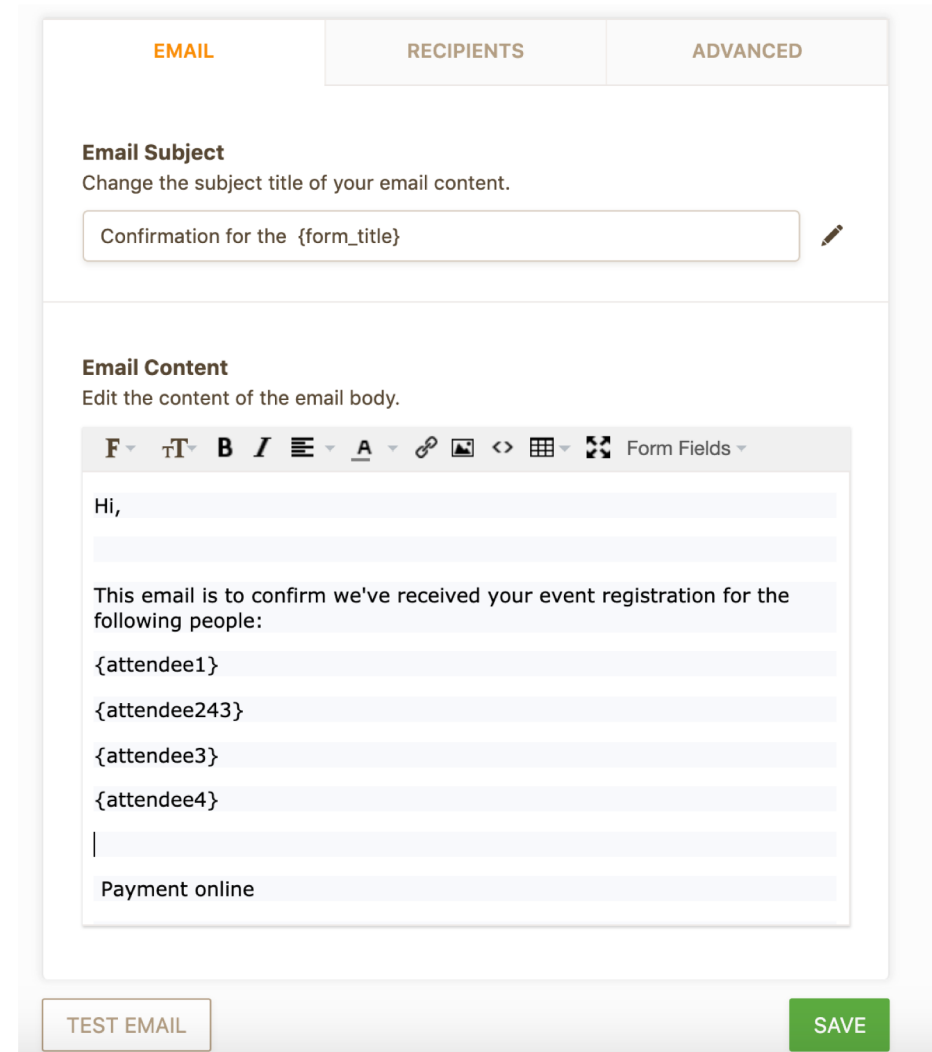
Settings: Automatic Emails from JotForm

Whenever the user hits "Submit" creates a "submission" and two things happen automatically.

1. The user receives an "Autoresponder" email (default is the email they entered), confirming the data entered.

2. The rally organizer (or whoever is designated) receives a "Notification" that a submission has been made and what data was entered by the user. *The Free version allows only one email to receive the notifier.*

The form creator determines the content in the Autoresponder, using the "email" tab, and who receives each submission using the "recipients" tab.

Don't forget to SAVE!

One advantage of JotForm is that you do _**not**_ need to save these Notifiers because all submissions are archived on the JotForm server and can be downloaded by multiple people in either PDF or Excel Spreadsheet format on demand, via password protection. You don't have to request it from anyone, so you always have a current overview of your event registrations.

Additional information on downloading submissions follows.

SETTINGS: THANK YOU PAGE

The Thank You page can be edited to contain a custom message.

Now preview the form (upper right corner). Send the link to several people to test. Be sure your testing includes selection of **all** possible options. This is an important step so you have sample submissions to view. The form is very easy to edit and can be edited even while "live."
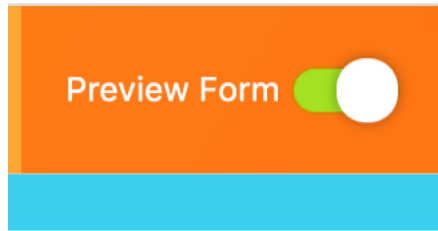
When testing the form it's sometimes easier NOT to set fields as "required" until you are sure the calculations are correct.

How to Publish a JotForm and access Submissions.

Click on the Publish tab at the top. The **LINK TO SHARE** that appears is the connection between the form and the user. It can be included in emails, websites, newsletters - any digital media. It's that simple.

Remember, though, posting the link on a Facebook / Instagram Page makes it public. You probably don't want to do that.

You have the option of Inviting multiple people to see the form.

YOU PROBABLY DON'T WANT THIS FORM TO APPEAR ON A FACEBOOK OR INSTAGRAM GROUP THAT IS OPEN TO THE PUBLIC. Yes, our website is public, but Social Media is much more widely read.

DIRECT LINK OF YOUR FORM
Your form is securely published and ready to use at this address.   ⚙ Settings

LINK TO SHARE

🔒 https://form.jotform.com/200800601182136   ✏

🔗 COPY LINK   OPEN IN NEW TAB

INVITE PEOPLE ⬆

Add multiple email addresses separated by commas.

Add Message   SEND INVITATION

SHARE FORM
Share your form link in various social posts and through email.   SHARE OPTIONS

Submissions

How do you retrieve/download the submissions?

Scroll to the top so you can see the JotForm logo in the upper left, then click the "Form Builder" link.

Click on the "Submissions" button to display all submissions. **The tests you have done with the form will be listed here.** You can delete them later.
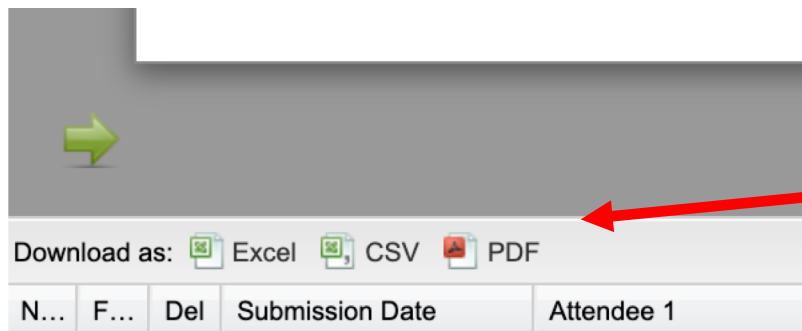
Download all the submissions to your computer by selecting the desired format as often as you wish. Excel is recommended.

Download as: Excel CSV PDF

N... F... Del Submission Date Attendee 1
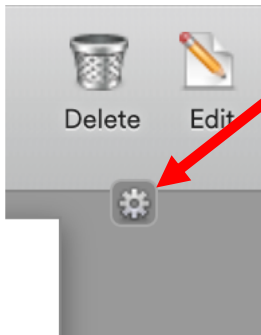
To share the submissions with event organizers (only), click on the tiny "gear icon" **in the upper right.**

Delete Edit

Select "Make this Page Public."

Create a password to Share.
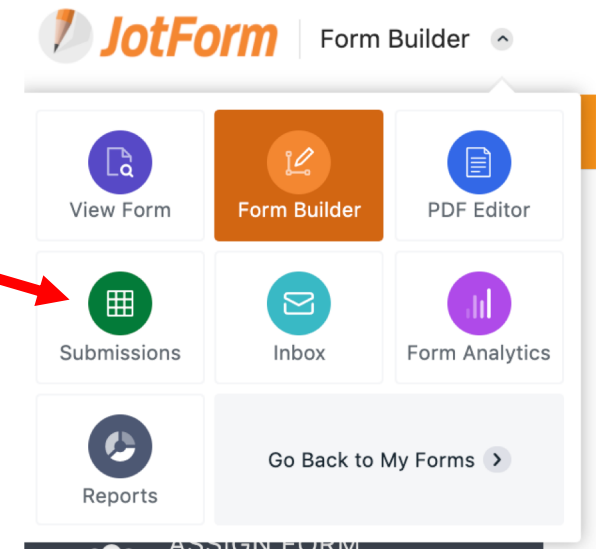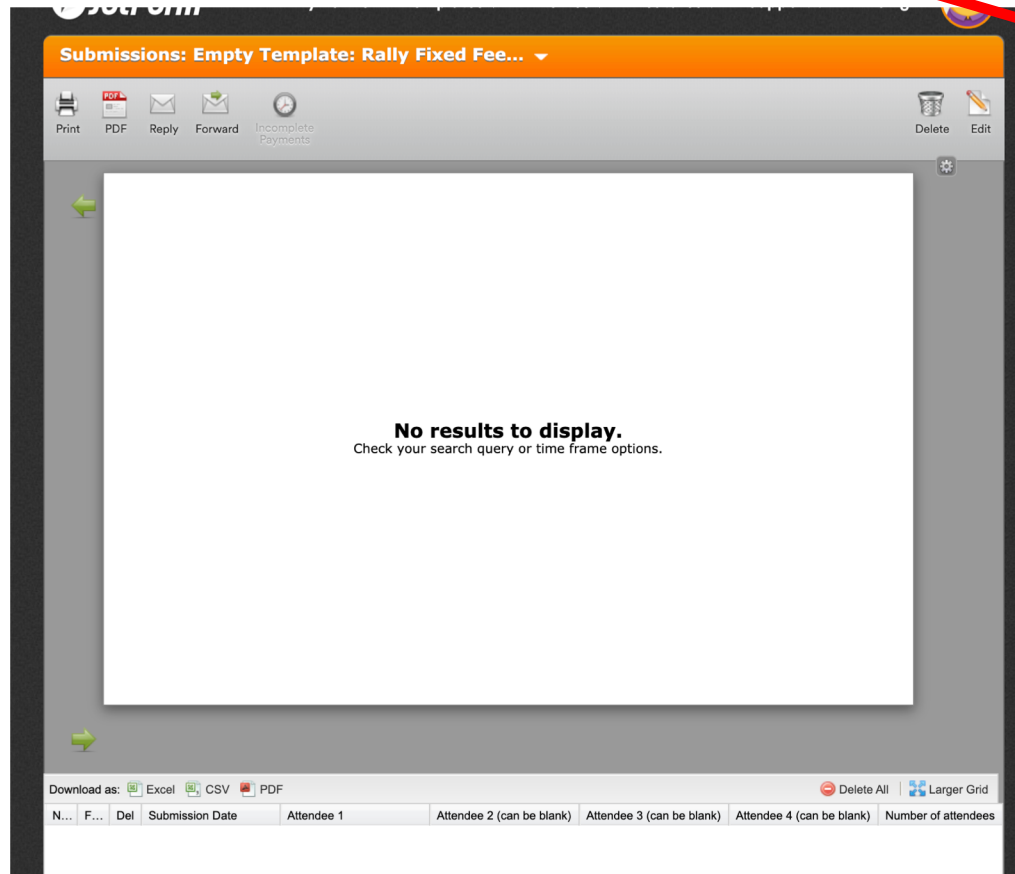ARCHIVE THE PASSWORD. *YOU CAN NOT RETRIEVE IT LATER. You can only recreate a new one.*

Set Password

In order to make this page public you must first set a password.

Password to Share with Organizers

Cancel | OK

Time Frame:

All Time

Fields:

- ☐ ID
- ☑ **Submission Date**
- ☐ IP
- ☑ **Attendee 1**
- ☑ **Attendee 2 (can be blank)...**
- ☑ **Attendee 3 (can be blank)**
- ☑ **Attendee 4 (can be blank)**
- ☑ **Number of attendees**
- ☑ **Best Phone Number**
- ☑ **E-mail**
- ☑ **WBCCI #**
- ☑ **Special requests or notes...**

Options:

- ☑ **Auto Hide Empty Fields**
- ☐ Show Headers and Texts
- ☐ Make This Page Public
- ☐ Send Uploads to FTP

Submissions Export

The choice of format (Excel spreadsheet, PDF, CSV – Comma Separated Values) for the submissions is yours. Excel is recommended, but use the format with which you are most comfortable.

A spreadsheet will be in the same order as the fields so try to establish the best field order before publishing.

The spreadsheet can be edited by anyone who has the password.

Giving access to submissions

Giving access to event organizers (as many as you wish) is simple.

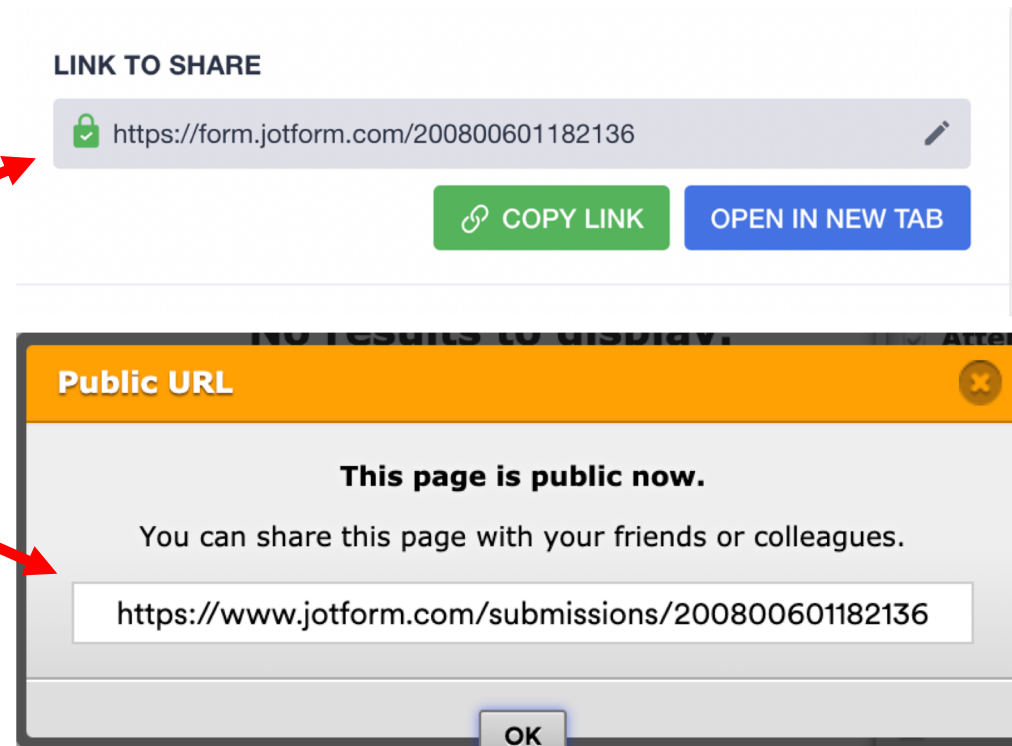When you create a password and click OK you will see a box with another URL in it. But this URL contains the word "submissions." By using this link, anyone with the submission link and the password has access to all the submissions, for this form only.

After you have created the form, send the event organizers the following:
- **the original link (containing the word "form")**
- **the submissions link**
- **the password to see the submissions**

LINK TO SHARE

https://form.jotform.com/200800601182136

🔗 COPY LINK   OPEN IN NEW TAB

Public URL

No results to display.

This page is public now.

You can share this page with your friends or colleagues.

https://www.jotform.com/submissions/200800601182136

OK

Starting from Scratch

All of the functions involved when using a template are the same when "starting from scratch." Templates are only a starting point.

Invent your own form. Customize it to your members' needs. Above all, enjoy learning something new. You may find many uses for JotForm, like gathering recipes from your club (We have a JotForm for that we would gladly share), making a survey, holding an election.

Thanks for your patience in helping us refine this document, and for your questions and suggestions. Let us hear from you.

- The Information Technology Committee, itc@airstreamclub.net