Kintivo Forms for SharePoint

User Manual



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User Manual

First of all, congratulations on being a person of high standards and fine tastes! Kintivo Forms is loaded with features which provide you with a super easy to use, yet very powerful SharePoint form building solution. *Now let's build some forms!*

-Add the Web Part to the SharePoint page.
-Point the Web Part to a SharePoint List.
-Pick the fields you want and click OK.

NOTE: Please ensure your Administrator has activated the "Kintivo Smart Forms" Feature on the site you wish to use. Instructions for activation are in this document.

X	Kintivo Smart Forms	Deactivate	Activo
	Custom forms made easy. Learn more at kintivo.com	Deactivate	Acuve

For End Users

The Kintivo Form Web Part allows you to quickly add new forms to SharePoint pages, here's how:

Add the "Kintivo Forms" Web Part to the desired page.
 It can be found in the "Kintivo Smart Components" category:

Categories	Parts
Custom	Kintiyo Forms
Document Sets	
Carl Filters	
Comms Terms	
🛅 Kintivo Forms	

2. Now that the Web Part is on the page, you can tell it which SharePoint List to submit to, which fields you want and many other options by clicking "Edit Web Part" located in its dropdown:

2



Kintivo Smart Forms	
TRIAL VERSION - BUY	Minimize
Please edit the web nart and select a list	Close
	X Delete
	당 Edit Web Part
	Export

3. Once the Web Part edit panel is open, specify which List to submit to, which fields you want, button types, Landing Page or Thank You Text, and many more options.

All of these options are visually described below.

Note: Be sure the SharePoint List you want to submit data to already exists. If the List *doesn't* already exist, go create it and return to this step.

Web Part Edit Panel

	Kintivo Smart Forms X X
Kintivo Smart Forms	Configuration
TRIAL VERSION - BUY	Configure Smart Form
Please edit the web part and select a list	TRIAL VERSION - BUY
	Import/Export
	Appearance
	Title Kintivo Smart Forms

Clicking the "Configure Smart Form" link in the web part edit panel will pop-up the Form Builder Tabs.

Form Builder Tabs

LIST TAB

Use the List Tab to select the list you wish the form to post data to. The list may reside anywhere within the current Web Application and is not required to reside in the same site as your form. First, select the Site Collection, then the Site, then "Select Target List".



Form Modes:

Add New Item (Mode) – forms for posting NEW items to a SharePoint List.

Update Existing Item (Mode) – pre-populated forms for UPDATING existing items in a SharePoint List. When using the update mode, be sure to fill in the "Url Parameter Name" field or the Cookie Parameter Name field. The web part will need to know where to get the Item ID value from. It will always look in the URL for this value, but needs to know what to look for. The "Url Parameter Name" field (sometimes called Query String Parameter Name) is used for just that. You can optionally tell the web part which Item ID to update using a cookie value (Cookie Parameter Name).



The below sample setting tells the web part to look for a cookie titled "SF_IF" or in the URL for a parameter called "**SF_ID**".

	Form Mode
MODE	Update Existing Item
	URL Parameter Name: 🔍
	SF_ID
	(1)
	Cookie Parameter Name: 🦞
	SF_ID

In the above example, if a cookie titled "SF_ID" does not exist, the web part will use the value of the "SF_ID" URL parameter to populate the form.

For example, the following URL: "http://YourSite.com/pages/UpdatePage3.aspx?SF_ID=725"

...would tell the web part to pre-populate the form with the List Item which has the ID of "725".

Cookie Parameter Name

You may use cookie values to tell the form which List Item ID you want to update, just make sure the cookie exists and has the correct name and value assigned to it.

Tip: There are many ways to populate the URL with the List Item ID you wish to use, including using the Smart Forms Web Part itself! For example, you may have the need to use multiple forms and multiple pages to satisfy your specific form based solution (think "wizard" based interfaces). To do this, you would start with a form in "Add New Item" mode, and specify the "Landing Page" as your "Step 2" page. You would also tell the first form (the one in "Add New Item" mode) to pass the "ID" to the Landing Page (this is a setting in the "Submit Options / Submit URL Fields" section). When you do this, the web part will automatically append the URL Parameter titled "**SF_ID**" to the specified Landing Page URL, and set the value of the "SF_ID" equal to the ID of the new Item being created. Your "Step 2" page would have the Smart Forms Web Part set to "Update Existing Item" mode, and you would fill in the "Url Parameter Name" with "SF_ID". **Note**: When passing the ID to your Landing Page, the Smart Forms Web Part will pass it using the URL Parameter Name = "SF_ID".



Fields & Widgets

The Fields Tab is used to specify the fields and widgets to be displayed on your form. Fields come from the SharePoint list specified on the list tab. Drag n' drop fields and widgets onto your form as you see fit.



Mouse over the fields' little icons to view what it's telling you about the field. It might be a required field, it might be telling you the field is hidden, has a description, a default value, or has a show/hide condition.



Required Fields: Required fields are designated with an asterisk (*) on the resulting form. To make a field required, simply set the respective SharePoint List Column to required. You do not have to display a field on your form just because it is set to required within the respective SharePoint List. However, when you display a field that happens to be required within the SharePoint List, it will also be required on your form.

Field Validation: The Smart Forms Web Part provides field validation based on the List Column settings you are using. For example, if your list has a required field, that field will also be required on your form. If your list has a date/time field, the field will automatically be represented on your form as a date/time picker. The same is true for all SharePoint List Column types (text, yes/no, dropdowns, radio buttons, checkboxes, etc...).

More sophisticated field validation may also be used such as comparing fields (example: Email Address field needs to match the Confirm Email field). This type of validation is handled using regular expressions on your SharePoint List. If you are already using regular expressions on the Lists, rest assured the Smart



[Email Address] = [Confirm Email]

Email Addresses must match!

Formula:

User Message:

List

Add a Field

Forms Web Part will honor your settings. List validation settings can be found by navigating to your List, and then: List Settings / Validation Settings (located under the General Settings section).

> This SharePoint List Validation setting would cause the Smart Forms Web Part to check on form submission that the "Email Address" field data is equal to the "Confirm Email" field data entered by the user. If they are not the same, the Smart Forms Web Part will display the specified User Message (above) to the user, and it will not submit the data to your list until the validation is satisfied.

> > More Information



E	Edit field	settings	by c	licking	the	edit	pencil	icon.
ſ					_			

Email

Display

Add a Widget

-

Insert Column:

Category

Created Email Address

End Time Free/Busy

Location Modified

Add to formula

*

Approval Status

Check Double Booking Confirm Email

*

•

First Colu

About You

۸

	Full Name	Save & Close	i Ø
	Field Label (to show on form)	Full Name Reset	E Beneficiary 1
	Description		:i⊘
	Default Display	Show	🗆 Beneficiary 2
🗉 Job Title	Encrypt Field Value		
	Required	Reset	5iØ
	Required Error Message	Oops, you forgot to give us your name!	
	Read Only		
	Default Value Setting		1
	URL Value		
	Default Value		
	Kintivo Membership Manager	Advanced Settings	
	Override above default values w	vith Kintivo Authenticated member details	
		Use Defaults Above	

Field Label (to show on form) – whatever you type in here will display on your form as the field label. The default label is the List Column name.

Description - if you flipped the "Display field descriptions" toggle (lower left of "Fields" tab), the field description will also appear on your form below your fields (if your fields have descriptions).

Add a Field Add a Widget			<u>First Column</u>
🗔 Address	🖾 City	🗉 Company	About You
Country/Region	🖾 Fax Number	🗔 First Name	⊑ Full Name
🗔 Home Phone	Invention	🗔 Job Title	Prefered Contact
★ □ Last Name	🗔 Notes	State/Province	E Email Address
☆ ⊡ Subject	🗉 Web Page	🗉 ZIP/Postal Code	☐ Confirm Email
			E Business Phone Business Phone
			L Mobile Number
,			

When ON, your form will display the List Column descriptions from your SharePoint List by default. You can overwrite the default value by adding your own field description to the "Description" box.

Default Display (dropdown) – the "Show" option (default) makes the field visible on your form. The "Hide" option will hide the field when the form first loads. You may cause a hidden field to appear based on the value selected during the form filling process. See "Dynamic Display Conditions".

Encrypt Field Value (checkbox) – this option causes the value to be encrypted prior to saving to the SharePoint list. The data will be encrypted and non-usable when viewing from the standard SharePoint List View, or from within the backend database for that matter. This is useful for satisfying compliance requirements such as HIPAA and others, including password storage.

Important Note on Encryption: You should supply your own unique and secret encryption key. Your key may be input into the web part from the web part properties dialog box (see below image). You can make up your own encryption key, or follow your company policy on the matter, but either way, do NOT lose it. The web part can NOT properly encrypt/decrypt values without your key. We can NOT help you if you lose your key. Do not change your encryption key once you have started encrypting values via the form.

∢ Kintivo Smart Forms ×
Configuration
Configure Smart Form
Import/Export Import Import/Export Import Import
Info & Settings
Encryption Key:
MyC0mP@nY-K3y
Display Form In Edit Mode
Run Workflow Asynchronously

See "Security & Data Encryption" for more details.

Required (checkbox) – this option forces the field to be entered prior to form submission. Enter a friendly message to be displayed should the user fail to supply a value for this required field into the "Required Error Message" box.

Read Only (checkbox) – the "Read Only" checkbox makes the field non-editable yet still displays the field on your form.

Default Value Settings – prepopulate your form field by specifying:

- URL Value provide the URL parameter name that will contain the default value for this field.
- Default Value type in the desired Default Value for this field.

If the SharePoint List Column has a default value, it will be used unless you are using one of the above two options.

Kintivo Membership Manager Advanced Settings (dropdown) – when used with other Kintivo products such as Kintivo Smart Login or Kintivo Membership Manager, you may control the default values based on the user that is currently logged in and accessing the form.

Kintivo Membership Manager Adv	anced Settings	
Override above default values with	Kintivo Authenticated member details	
	Use Defaults Above 🔻	
	Use Defaults Above	
	Authenticated User	
	Authenticated User's Company	

WIDGETS

Widgets are small applications with limited functionality that can be added to your form. A widget occupies a portion of your form and does something useful.

You can drag 'n drop widgets onto your form from the Fields / Add a Widget tab.

Note: You may use multiple instances of most widgets on your form. The widgets that can only be used once per form are gray (Attachment, Captcha).

L	ist Fields [Display Email	Miscellaneous		
A	dd a Field Add a Wide	get			
	Cancel	Captcha	Display Attachments	Embed Code	Embed Content
	Google Map	Spacer	Submit	System Field	URL Data
	Upload Attachments				

SUBMIT & CANCEL WIDGETS

These widgets are used to control your forms submit and cancel buttons.

SUBMIT BUTTON WIDGET

Default Display	Hide v
Submit Button Type	Button 🔻
Submit Button Text	Submit
Alignment	Center •
Submit Form Option	Thank You Text Landing Page URL
Thank You Text 政	
← ← Formats ▼	Font Family - Font Sizes - B I
	Font Family ▼ Font Sizes ▼ B I I ○ E
▶ Formats ▼ A ▼ A ▼ Ø □ □	Font Family ▼ Font Sizes ▼ B I I ○ E <td< td=""></td<>
↑ Formats ▼ A ▼ A ▼ θ I Θ I	Font Family ▼ Font Sizes ▼ B I I ○ E E I II II II
 ▶ ♥ Formats ♥ ▲ ▼ ▲ ▼ Ø □ ■ ■ ■ Thank You! 	Font Family ▼ Font Sizes ▼ B I I ○ E <td< td=""></td<>
 ▶ Pormats + ▲ + ▲ + P Pormats + A + A + P Pormats + Pormat	Font Family ▼ Font Sizes ▼ B I ■ ○ E E E E E E E E E E E E E E E E E E

- Default Display control if it should show or hide the button when the form page first loads.
- **Submit Button Type** submit button, text or image.
- Submit Button/Text/Image URL text to display for submit button or submit link (text).
- **Alignment** position within the column to align button.



• Submit Form Option:

Thank you text – Submit Behavior: submits form data to list, resets to blank form and displays this text. You may use form field values within your Thank you text:

Submit Button Text	Submit					
Alignment	Center		۲	1		
Submit Form Option Thank You Text 🥠	Thank You Te	ext 🔘 Land	ling Page I	JRL		
File - Edit - Insert	✓ View ✓ For	mat 👻 📑	Tools 🕶			
+ + Form: 🖬 In	sert image	Font Size	s 👻	В	I	
A + A + d d ln	sert link Ctrl+K	3	I E	łΞ	9	
Е — н	orizontal line	-				
Thank Yo 💷	sert Form Field					
		2		nd aet	back	to you
Your feedback has been su real soon. We will contact y	bmitted. We will rev you using this email	iew your fe address: [eedback a [[Email Ad	dress]]	
Your feedback has been sul real soon. We will contact y Display Form	bmitted. We will rev you using this email	iew your fe address: [eedback a [[Email Ad	dress]	1	

Insert Form Field(s)		
Full Namo	Best Contact Method	Email Address
Confirm Email	Business Phone	Mobile Number
Uploads?	Interests	Feedback

- **Display Form –** clear and display the form after submit so the user may fill/submit again.
- **Fade text after 10 seconds** only display the Thank You text for 10 seconds, then fade it away.
- Landing Page URL: Submit Behavior: submits form data to list and redirects user to this URL.
- **Submit URL Fields**: Submit Behavior: Submit data to list. Passes these values in the query string to your Landing Page URL (*Tip*: be sure to pass the ID if your landing page is part of a multi-part-form solution).

Submit		×		
<u>A</u> * <u>A</u> * B				
E				
Thank You! Your feedback has been submitted. We will review your feedback and get back to you real soon. We will contact you using this email address: [[Email Address]]				
Display Form	•			
Fade text after 10 seconds				
Submit URL Fields	ID Last Name First Name Full Name Email Address Company Job Title Business Phone Home Phone Mobile Number			

CANCEL BUTTON WIDGET

Cancel		×
Default Display	Show	
Cancel Button Type	Button 🔻	
Submit Button Text	Cancel	
Alignment	Center •	
Landing Page URL		
Cancel URL Fields	D Last Name Fuil Name Email Address Company Job Title Business Phone Home Phone Mobile Number Fax Number	•

- **Default Display -** control if it should show or hide the button when the form page first loads.
- **Cancel Button Type** button, text, image or don't display cancel button.
- Cancel Button/Text/Image URL text to display for cancel button or cancel link (text).
- **Alignment** position within the column to align button.
- Landing Page URL: Cancel Behavior: does not submit form data to list, redirects user to this URL.
- **Cancel URL Fields**: Cancel Behavior: does not submit data to list. Passes these values in the query string to your Landing Page URL (*Tip*: be sure to pass the ID if your landing page is part of a multi-part-form solution).



ATTACHMENT WIDGET

If the SharePoint List allows attachments, you can allow users to attach multiple files to a single form submission by adding the Attachment Widget to your form.

Your Name *	More Info	7	
Email Address *	Affiliation *	Vendor	
Confirm Email *		Customer	
Business Phone		Concerned Party	
Feedback	Related Department	Services	
	 Priority	• Low	
		O Medium O High	
	 -		

DISPLAY ATTACHMENT WIDGET

Display existing item attachments on forms that are in Edit Mode by adding the Display Attachment Widget to your form.

SPACER WIDGET

The spacer widget allows you to add text, images and HTML to your form. Drag 'n drop as many spacer widgets as you need to get your form looking just right. Use the Spacer widget to separate sections of your form.

About You		Your Feedback
Full Name *		Interests Derms
		Data Standards
refered Contact *	Phone	Framework
	How shall we contact you?	Tools
Business Phone *		Maintenance Requests & Process
Mobile Number *		Spacer Widget
Uploads?	No	-
	Do you have any files to upload?	
		l'm not a robot
100	Cool we will use a	TreCAPTCHA Privacy - Tarres
	cool, we will use a	



	Spacer Default Display	Show	•	
	Name Spacer HTML	Your Feedback		
Your Feedback	File Edit Insert Image: Second seco	View Format Font Family Font Si Image: State	Tools - izes - B I	
	Your Feedback			

Click the "edit pencil" icon on the Spacer to access its pop-up dialog.

- **Default Display** control if it should show or hide the Spacer Widget when the form page first loads.
- Name name given to your Spacer to help you keep them sorted out, does not display on form.
- **Spacer HTML** text or html to be displayed on your form.

CAPTCHA WIDGET

You can ensure data being entered into your form is from a real human (and not a spam-bot) by optionally allowing Captcha Control Validation.

The Smart Forms Web Part uses ReCaptcha: http://www.google.com/recaptcha -ReCaptcha is a free anti-bot service that helps digitize books.

If you check the box "Allow Captcha Control Validation" – you will also need to supply your ReCaptcha keys (public and private). You can very quickly get these free keys from: <u>http://www.google.com/recaptcha</u>





Once you have your keys, paste them into the appropriate boxes.

Captcha		×	
Default Display	Show •		
Captcha Public Key (Site key)	e key) 8TyRESPWAQs9DyAAEMjYP4vzSJJh9DyCnqj		
Captcha Private Key (Secret key)	P4vzSJJAPWAQs9DyCnqjJJh9DyCnqs9DyAAE		
Captcha Validation Message	Captcha Validation Message Oops, you still need to place a check in the "I'm not a robot" box.		
Get your free keys from Google: htt	p://www.google.com/recaptcha		
l'n	n not a robot reCAPTCHA Privacy - Terms		

URL DATA WIDGET

The URL Data Widget allows you to display data on your form that comes from a URL parameter. Specify the name of the URL parameter in the "URL Parameter" box and the widget will display the value of that parameter.

Display URL Data		×
Default Display	Show •]
Label Text	URL Data	_
URL Parameter		_
Hide if URL string missing		
Default Text	Not found]



SYSTEM FIELD WIDGET

The System Field Widget displays system fields from your SharePoint List on your forms (Modified, Modified By, Created, Created By, and Version).

System Field		Save & Close
Name	Last Modified By	
Field	Modified By •	

EMBED CODE WIDGET

The Embed Code Widget allows you to paste in existing embed code generated from sites like YouTube, or even your own JS scripts.

Embed Code		Save & Close
Default Display	Show	
Name	EmbedCode1	
Embed Code		
<iframe hei<br="" width="640">frameborder="0" allowfu</iframe>	ght="360" src="https://www.youtube.com/ llscreen>	embed/6YqcjhwGLHk?rel=0"



EMBED CONTENT WIDGET

The Embed Content Widget allows you to inject HTML5 content into your forms. Similar to how the native Content Editor Web Part works, you can target a pre-existing file (URL) and it will render inside the form when the form page loads.

Embed Content		Save & Close
Default Display	Show	
Name	EmbedContent1	
Content file URL	/Assets/MyFile.txt	

GOOGLE MAPS WIDGET

The Google Maps Widget will display a Google Map on your form with a pre-populated address pin. The address/pin may be populated dynamically from the item being displayed on your form. Supply the "Location Field" dropdown with the column that contains the full address. **TIP**: If your list does not already have a column that contains the full address, it's easy to automate this by adding a calculated column to your list. The calculated column should concatenate the address fields together to form a single address value (Ex: Street, City, State, Postal Code).

Google Map		Save & Close
Name	Мар	
Location Field	Address	•
Google API Key 🥡		Google Maps Usage Limit
Default Zoom Level 🕠	8	
Google Map Height (px) 뒞	300px	
Google Map Width (px or %) 🚯	100%	



Security & Data Encryption

Encrypt form field data before it even reaches your SharePoint List. The only way to read the encrypted value is Kintivo Forms.

Under "Info & Settings" of the web part properties dialog, provide your own "Encryption Key" to be used by the web part for encrypting and decrypting your data. This can be any alphanumeric string containing special characters – don't lose it (only you can decrypt your data).

Kintivo Smart Forms	×
Configuration	
Configure Smart Form	
Import/Export	
Info & Settings	
Encryption Key:	
Display Form In Edit Mode	
Run worknow Asynchronously	
	2013 5.4.1

After providing your Encryption Key, you may enable Encryption by checking the "Encrypt Field Value" within the field edit dialog.



Title		Save & Clos
Field Label (to show on form)	Security Phrase	Reset
Description		
Default Display	Hide	•
Encrypt Field Value	s.	
Required		
Required Error Message	You must provide a security phras	se.
Read Only		
Default Value Setting		
URL Value		
Default Value		
Kintivo Membership Manager	Advanced Settings	
Override above default values w	vith Kintivo Authenticated member det	ails
	Use Defaults Above	T

Analytics

Optionally capture and retain important analytics related to the form submission such as the IP Address of the person submitting the form and User Agent (browser) information. SharePoint already tracks the Date/Time, so all you need to do is specify the columns you wish to store the IP Address and User Agent details captured during form submission.

List	Fields	Display	Email	Miscella	aneous
Record IP A	ddress to:	IP A	ddress	T A	
Record Use	r Agent to:	Use	r Agent	τ 📢	

Specify where to store the IP Address and User Agent details from the "Miscellaneous" tab. The dropdowns represent columns from the list specified on the "List" tab. You may want to create new columns for storing this information. In the above picture, the list has a column called "IP Address" and another column call "User Agent". The column name does not matter, but for usability purposes it is wise to name them in a manner that makes sense to someone viewing the list item.

Once the columns are specified on the "Miscellaneous" tab, the IP Address and User Agent information will be captured during form submission and posted to the specified columns:



User Agent	Mozilla/5.0 (Windows NT 10.0; WOW64) AppleWebKit/537.36 (KHTML, like Gecko) Chrome/49.0.2623.87 Safari/537.36	
IP Address	66.229.16.184	
Created at 3/14/2016 9:52 AM $$ by \Box		

Run Workflow Asynchronously (Improve Performance)

If your form is submitting to a list that has one or more workflows, you may run workflow asynchronously. When running workflow asynchronously, workflow(s) may run in parallel to the form submission process and these workflows often take much longer to process than the form submission. This will allow the form to post data without waiting for the workflow(s) to complete. This can improve the end user experience when a form is submitted by decreasing the wait time.

Under "Info & Settings" of the web part properties dialog, check the box titled "Run Workflow Asynchronously".

 Kintivo Smart Forms 	×
Configuration	
Configure Smart Form	
Import/Export	
Info & Settings	
Encryption Key:	
Display Form In Edit Mode	
Run Workflow Asynchronously	
2	013 5.4.1

Dynamic Display Conditions (Conditional Logic / Dynamic Fields)

It is often helpful to only show form fields when the person filling out the form answered a question in a certain way. For example, if the person says the best way to contact them is by phone, you might want to display the "Business Number" and "Mobile Number" fields. If they say the best way to contact them is by email, you might want to hide the phone fields and only display the "Email Address" fields.

Dynamic Display Conditions can be applied to **dropdown fields**. You can show or hide parts of your form based on the answer. This includes <u>any number of fields or widgets</u> that are <u>already on your form</u>.



If answer is	then	this field or widget	
Phone v	Show •	Business Phone	
Phone •	Show •	Mobile Number	[-] Remove
Phone •	Hide v	Email Address	[-] Remove
Phone •	Hide v	Confirm Email	[-] Remove
Email 🔹	Show •	Email Address	[-] Remove
Email 🔹	Show v	Confirm Email	[-] Remove
Email 🔹	Hide v	Business Phone	[-] Remove
Email 🔹	Hide v	Mobile Number	[-] Remove
Phone •	Show •	Spacer - Phone	[-] Remove
Phone •	Hide v	Spacer - Email	[-] Remove
Email 🔹	Show •	Spacer - Email	[-] Remove
Email 🔹	Hide v	Spacer - Phone	[-] Remove
[+] Add another			

In the below example, if the person filling out the form selects "Yes" in the "Uploads?" dropdown field, the form will display the "Attachments Widget" for them to use.

Uploads?				×
Field Label (to show on form)	Uploads?		Reset	-
Description	Do you ha	ave any files to upload?		
Default Display	Show	•	,	
Required				
Read Only				
Default Value Setting				-1
URL Value				
Default Value	Sele	ct Default Value	•	
✓ Use default value: No				
Dynamic Display Condition(s)	n based in ar	iswer.		1
If answer is	then	this field or widget		
No	Hide •	Attachments	•	
Yes	Show •	Attachments	 [-] Remove 	
[+] Add another				

Note: Dynamic Display Conditions may be enabled on any dropdown field.

Auto Suggestion Settings

Auto Suggestions are available on Lookup fields. They are also available on People Picker fields if you are using Kintivo Smart Login product. Auto Suggestions allow the person filling out the form to start typing and it will auto-suggest based on existing values in your lookup/people picker.



Suggestions Settings	
Provide Suggestions	●Yes ○No
Default Display Text	Begin Typing
Show Add New Item	
Add New Item Url (Leave blank for List Default)	
Add New Item Display Text	Add New Item

Integration with Kintivo Membership Manager

When using our Membership Manager product to organize, track and maintain people, companies and roles, this integration allows your forms to default lookup and people picker fields to current user or current user's company.

Display Tab

Use the Display Tab to control the look and feel of your form. Select from one of the professionally designed mobile friendly "Smart Style" options or take full control with your own CSS file.

List Fields Display Email Miscellaneous	
Form Title (Supports HTMLTags):	Default Style (CSS)
File - Edit - Insert - View - Format - Tools -	/* Smart Form CSS */div.smart-form {
Some Formats - Font Family - Font Sizes - B I	Smart Style:
	Clean Ocean 🔻
	Smart Form
Download the free trial now!	Smart Form
ON Show Form Title	SELECT
	/Style Library/SmartFormStyles/SmartFormStandard/Themes/Clean Ocean.css
OFF Enable Configuration Output Details	

Form Title (Supports HTML Tags) – similar to normal web part titles found in the appearance section of most web parts, but this one allows HTML to be used within the title and you have more control over the display via CSS and Smart Styles.

Default Style (CSS) – CSS used to control the form appearance.

Smart Style – choose from one of our professionally designed form Smart Styles or go cowboy with your own CSS file.

22



Smart Style:	
Japanese Garden	
	Smart Form
Preview	Smart Form
CSS file path	
<u> </u>	Select
/Style Library/SmartFormStyles/SmartF	ormStandard/Themes/Japanese Garden.css

Select "Custom" to use your own CSS to control the form appearance.

Default Style (CSS):
/* Smart Form CSS */div.smart-form {
Smart Style:
Custom 🗸 🦨
/Style Library/SmartFormStyles/SmartFormStandard/Themes/MyCustomCSS.css
(e.g. http://{site}/{subsite}/_catalogs/masterpage/css/MyCustomCSS.css)

Enable Configuration Output Details – ONLY used by our Support Team

Read more about customizing the look and feel of your forms in the "For Administrators" section of this document.



Email Tab

Sometimes it's helpful to send emails when a form is submitted. Use the Email Tab to configure your optional email.

List Fields	Display Email		
ON Send Email			
To:	[[Email Address]]		
CC:			
BCC:	bsmith@email.com		
Subject:	Your Feedback		
Message:	File * Edit * Insert * View * Format * Tools * * Formats * Font Family * 12pt B B * • * • <tr< td=""></tr<>		

Email Variables:

Form fields may be embed into your emails, including the To, CC, BCC and Subject lines. To embed form fields, use the Insert dropdown and select "Insert Form Field".

Double brackets "[[Field Name]]" are placed around field names to



reference form data within your email. Form field names ARE case sensitive, so we recommend using the "Insert Form Field" option to avoid typos.



Publish Your Form

1. Click the "Save & Close" button from the Form Builder Tabs:



2. Click the "OK" button (if open still) on the **Web Part Edit Panel**: (remember to save your page)

Chrome State	
O Minimized	
Chrome Type	
Default 🖌	
Layout	
Advanced	
OK Cancel Apply	
>	



For Administrators

Please ensure the Smart Forms Web Part installation has occurred, *and has been activated on the site you wish to use.*

- A) Go to the site you wish to use.
- B) Ensure the following Feature has been activated: "Kintivo Smart Forms" Go to: Site Actions / Site Settings / Site collection features



Note: If you go to Site Settings and don't see the Site Collection Administration Section as above #3, it's one of two things:

1. You are not at the Top Level Site Collection – Go to the Top Level Site Collection from the Site Settings page by clicking on "Go to top level site settings."





2. You are not signed-in as a Site Collection Administrator – Sign Out, sign back in as a Site Collection Administrator.

From the Site collection features page, scroll down to the "Kintivo Smart Forms" feature and ensure it says "Active" (see below).

X	Kintivo Smart Forms	Deactivate	Active
	Custom forms made easy. Learn more at kintivo.com	Deactivate	Active

Note: If the "Kintivo Smart Forms" Feature is not listed on the "Site collection features" page:

- Make sure you are not accidently on the "Site features" page, which is not the same as the "Site collection features" page. You need to be a Site Collection Administrator to see the "Site collection features" page.
- 2. Ensure the solution has been deployed to the correct Web Application from your Central Administration site (see Installation Instructions).



Import/Export Smart Forms

Smart Form configurations may be exported and imported as needed. Each Smart Form export will generate an XML file that you should keep in a safe place. This file should also be named in a way you will remember which form it represents.

Export

Click "Export Smart Form Configuration".

 Kintivo Smart Forms 	×
Configuration	^
Configure Smart Form	
TRIAL VERSION - BUY	
Import/Export	
Browse Import	
Export Smart Form Configuration	

Import

Browse to your XML Export File. Click "Import".

 Kintivo Smart Forms 	— ×
Configuration	^
Configure Smart Form	
TRIAL VERSION - B	
Import/Export	
Browse Import	
Export Smart Form Configuration	



Look & Feel

The default CSS is diagramed below to help your designers more quickly make modifications.



CSS Diagram

