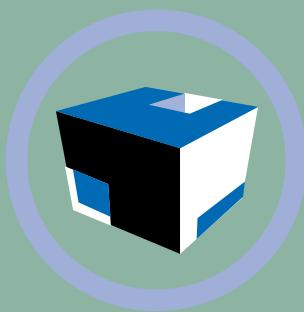


# LOGIFORMS.COM SOFTWARE

## QUICKSTART GUIDE SERIES



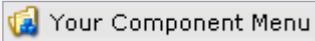
### FORM SUBMISSION NOTIFICATION

With Logiform's Email Notification you can respond faster to your customer's inquiries. Receive email notification instantly when a form has been submitted. You can even distribute the notifications based on values entered in the form. This type of functionality is perfect for sales, support, and technical requests.

This QuickStart guide shows you how to create notification profiles and context sensitive rules to route the form submission notifications to the correct parties.

# SUBMISSION NOTIFICATION QUICK START GUIDE

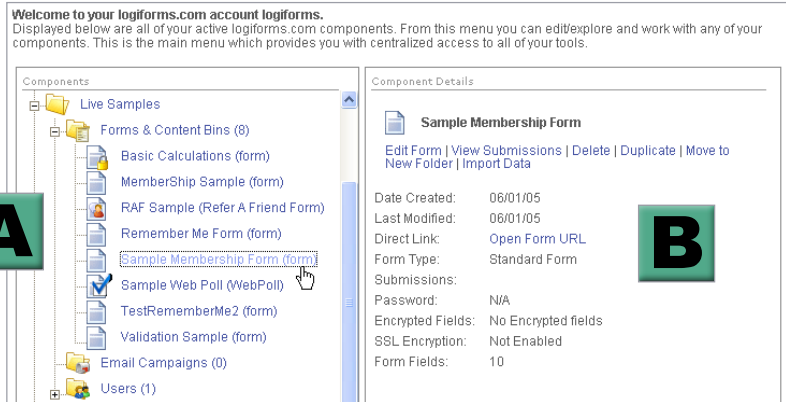
## GETTING STARTED



Before you can setup and use form submission notification's, you need to first select the form you want to work with. **Click the "Your Component Menu" button shown here to load your main menu.**

**A** Browse your project folders and click the form you want to activate.

**B** An overview of the selected form will load in the right side window shown here. The component details window contains key information about your form



### NAVIGATION TIP

Once you activate a component, as shown above, the Toolbar Menu will become available. Roll over the Form Designer Icon in the ToolBar to reveal the ToolBar Submenu and options for creating **Notifications** and editing your form.



Click the Notification link shown above to Create a new Notification Profile

## ENABLING NOTIFICATONS

**A** The first time you access the Notification section for a new form, you need to first enable the notifications by clicking the button shown below.

**B** Once you have enabled Notifications, you can now start to create Notification Profiles & Rules. The main notification menu, shown below, is divided in to two parts. On the left you have your Notification Profiles and on the right, you have Notification Rules. **Click the link shown below, under the Notification Profiles heading to create a new Profile.**

**C** The Notification Rules section is shown here. Rules are used to trigger Notification Profiles. Don't worry about Rules yet, they are explained later in this guide.

### Notification Settings

**Notification's are not currently Enabled.**

To create a Notification profile, first enable the Notification feature and create a new profile.

Enable Notifications



### Notification Profiles

Notification profiles are used to send email notification of form submission. Notification is NOT enabled by default. To receive notification when this form is submitted, you need to have at least one notification profile.

[You have no Notification configured. Click here to create an Notification.](#)



### Notification Rules

Notification rules enable you to trigger a specified Notification Profile based on a form submission.

You have no Rules configured. [Click here to create a notification rule.](#)



Disable Notifications

# SUBMISSION NOTIFICATION QUICK START GUIDE

## CREATING YOUR FIRST NOTIFICATION PROFILE

**A** Notification Profiles are triggered when your form is submitted and their primary purpose is to send “notification” of the form submission to a number of recipients.

First give the notification profile a name. Leave the Notification Profile Type on **standard** and enter up to 3 recipients (emails), a “from” email address and a subject line for the notification email.

**B** The Notification Profile Type menu also includes an option for Approval mode. This option allows you to approve the form submission, via email, prior to saving the submission to your database. This option is beyond the scope of this document. More information can be found in our user manual.

The screenshot shows the 'Notification Profile' configuration page. On the left, under 'Notification Profile', there is a text area for a descriptive name, a checked 'Set as Default' box, and dropdown menus for 'Notification Profile Name' (Standard Notification) and 'Notification Profile Type' (Standard). A dropdown menu is open for 'Notification Profile Type', showing options: Standard, Standard - Respondent Update, Approval Mode, and Approval Mode - Respondent Update. On the right, under 'Notification Email Details', there are input fields for up to 3 email addresses (bob@hotmail.com;sam@apple.com), a 'Notification return address' (notifications@logiforms.com), a 'Notification Subject' dropdown (First Name), and a text area for the email body (Dear [First Name]). A 'Continue' button is at the bottom right.

## CREATING THE NOTIFICATION EMAIL MESSAGE

**A** The next screen shows you a blank text area where you can enter the text for the Notification email. Logiforms can deliver multi-part emails. That is, logiforms can deliver both Text Only and/or HTML formatted emails. For Each Notification Profile, you can create a text version and/or HTML version. **Use the Link shown below to toggle between text and HTML mode**

**B** When you are in HTML mode, you will see the logiforms inline Email Designer, as shown below. This powerful designer provides you with a Word Processor like interface for designing professional & attractive email content.

**C** Select wildcards from the WildCard Drop down menu to include values from the submitted form. To include all of the fields from the form select **INSERT ALL FIELDS**.

The screenshot shows the 'Email Designer' interface. At the top, there are tabs for 'HTML Email' and 'Text Version'. Below is a text editor with a toolbar and a color palette. A dropdown menu for '---Insert Wildcards---' is open, showing options like 'userdomain', 'Phone', 'Email Address', 'Favorite Food', 'Logiforms Dept', and 'Status', with 'INSERT ALL FIELDS' selected. A callout box on the right contains the text: 'When using the Email Designer Interface shown in B, you can cut & paste any existing HTML into the editor. To do this, switch to Code View by clicking the code view icon at the bottom left of the editor window. Then cut & paste your HTML code.'

## SUBMISSION NOTIFICATION QUICK START GUIDE

**NOTE:** When you are creating or Editing a Notification Profile, the Profile will not be saved until you continue through each screen shown. If you click away while in the middle of the 2-3 step process, all changes will be lost. Be sure to continue through to the end. You will be returned to the Notification main menu shown below.

### PROFILE CREATION COMPLETE!

- A** After clicking continue your new profile is saved and you are returned to the Notification Profile main menu. Notice the message in red indicating that your Notification Settings have been updated. Displayed directly below is your new Notification Profile. Use the links here to create more Notification Profiles. You can then trigger specific Notification Profiles using Rules, explained next. In this way, you can redirect form submission to the appropriate persons or departments.
- B** Click the Create New Notification Rule link, shown here, to create your first Notification Rule.

**New Profile added.**

**A**

#### Notification Profiles

Notification profiles are used to send email notification of form submission. Notification is NOT enabled by default. To receive notification when this form is submitted, you need to have at least one notification profile.

Standard Profile: 1:Standard Notification (default)

[Delete Profile](#) | [Edit Profile](#) | [Add New Profile](#)

#### Notification Rules

Notification rules enable you to trigger a specified Notification Profile based on a form submission.

[You have no Rules configured. Click here to create a notification rule.](#)

**B**

### NOTIFICATION RULES

- A** Select the Notification Profile that should be triggered when this rule is met. Click Save Filter to finish.
- B** Shown here, the rules wizard makes it easy to build a context sensitive notification systems. Enter the criteria for the rule as shown here. You can add up to ten filters to each notification rule. In this way you can create complex conditional statements.
- C** Select the match type to use for this rule. Selecting **Match All**, will force each filter to be matched. Selecting **Match Any** will result in the rule returning a match when ANY of the individual filter clauses match. For more advanced combinations, select the **Custom Match** option and follow the on-screen instructions.

**A**

Select the Notification Profile to Send when this filter/rule is matched:

Standard Notification

Save Filter

**B**

Filter 1	Logiforms Dept	equals	Technical Support	<input type="checkbox"/>	<input type="checkbox"/>
Filter 2	--- Select Field ---	equals		<input type="checkbox"/>	<input type="checkbox"/>

Match All  Match Any  Custom Match (Advanced)

**C**

# SUBMISSION NOTIFICATION QUICK START GUIDE

## MANAGING PROFILES & RULES

**A** Use the notification management tools to manage an unlimited number of profiles and triggers per form. Add intelligence to your website communication through this easy to use interface.

Shown here is the main notification menu after it has been populated with a few profiles and rules. The rules, shown below and to the right are executed in the order they are displayed. When a match is found, the corresponding notification profile is triggered.

**New Profile added.**

### Notification Profiles

Notification profiles are used to send email notification of form submission. Notification is NOT enabled by default. To receive notification when this form is submitted, you need to have at least one notification profile.

Standard Profile: 1:Standard Notification (default)  
Standard Profile: 2:Urgent Notification

[Delete Profile](#) | [Edit Profile](#) | [Add New Profile](#)



### Notification Rules

Notification rules enable you to trigger a specified Notification Profile based on a form submission.

1. Sample Notification Filter

[Edit](#) | [Delete](#) | [Save Rule Order](#) | [Add New Rule](#) |  

Note: Notification rules are executed in the order they are listed above. Once a rule is matched, the profile is triggered and further processing is aborted. Use the up/down arrows to set the order in which the rules will be processed.