Forms & Registrations

DOCUMENTATION · FORMS

What are forms used for?

Forms let you collect structured information from customers — intake questionnaires before a coaching programme, registration forms for a seminar, application forms for a selective programme, feedback surveys, or any situation where you need more than a name and email. Forms are built inside Flowworx, embedded on your site pages, and all submissions are stored and manageable from your admin.

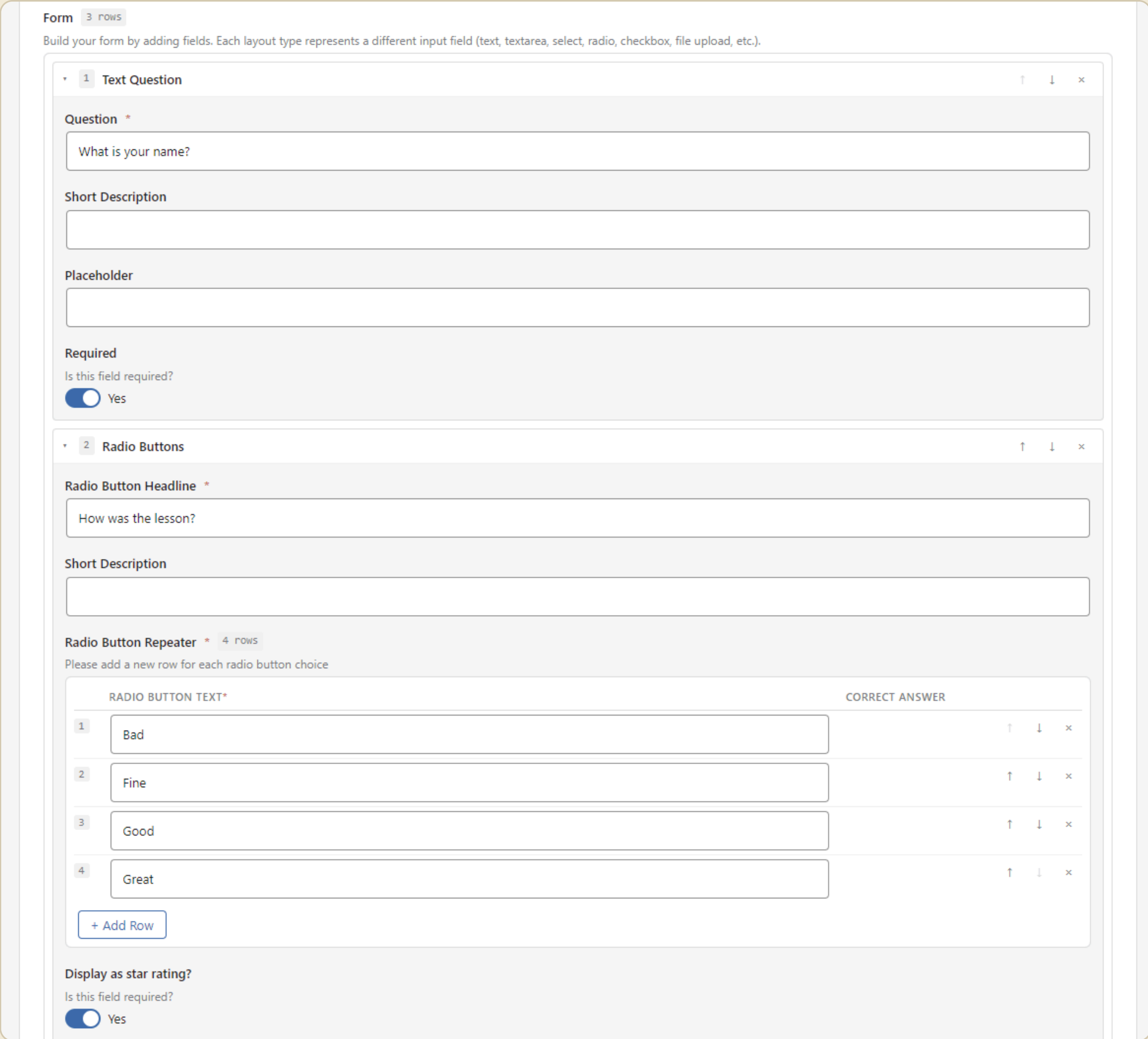
What forms can do

Beyond basic text fields, Flowworx forms support:

- **File uploads** — clients can attach documents, images, or other files directly in the form
- **Quiz and assessment scoring** — assign point values to answers and automatically calculate a total score on submission. Useful for self-assessments or eligibility screening
- **Save as draft** — clients can start a form, save their progress, and return later to complete and submit it. They do not lose their answers if they cannot finish in one session
- **Multiple field types** — text, long text, dropdowns, checkboxes, date pickers, file uploads, and more

Creating a form

Forms are managed under **Offers** → **Forms** in the Flowworx sidebar.



A form open for editing, with its fields listed in order.

To create a new form:

1. Go to **Offers → Forms** in the Flowworx sidebar
2. Click **Add form** at the top of the list
3. Give the form a name and click **Create** — this name is used internally to identify it
4. Build your form by adding fields one by one
5. Configure each field (label, type, required or optional, scoring if applicable)
6. Publish when ready

Field types

When adding fields to a form, you can choose from several types:

- **Text** — a single line of text (e.g. name, job title)
- **Long text** — a multi-line text area for longer answers
- **Dropdown** — a list of options the client selects one from
- **Checkboxes** — multiple options the client can select any number of
- **Radio buttons** — multiple options where only one can be selected
- **Date** — a date picker
- **File upload** — allows the client to attach a file. Large files are supported
- **Section heading** — not a field, but a label that groups and separates sections of the form visually

Each field can be marked as required or optional. Required fields must be filled before the form can be submitted.

Quiz and scoring

If your form is an assessment or self-evaluation, you can assign point values to individual answer options (on dropdown, radio, or checkbox fields). When the form is submitted, the platform calculates the total score automatically.

The score is recorded with the submission and visible in the admin. You can use this to triage responses, rank applicants, or provide clients with a result.

Embedding a form on your site

Once a form is published, it can be placed on any page of your site using a shortcode. Your site builder can add this to a page through the page builder. The form renders fully on the page — clients fill it in and submit without leaving the page or being redirected.

> 📌 *A form can appear on multiple pages at once if needed — the shortcode is the same each time.*

How submission works

From the client's side:

1. They open the page with the form
2. They fill in the fields — if the form supports drafts, they can save and return later
3. They submit the completed form

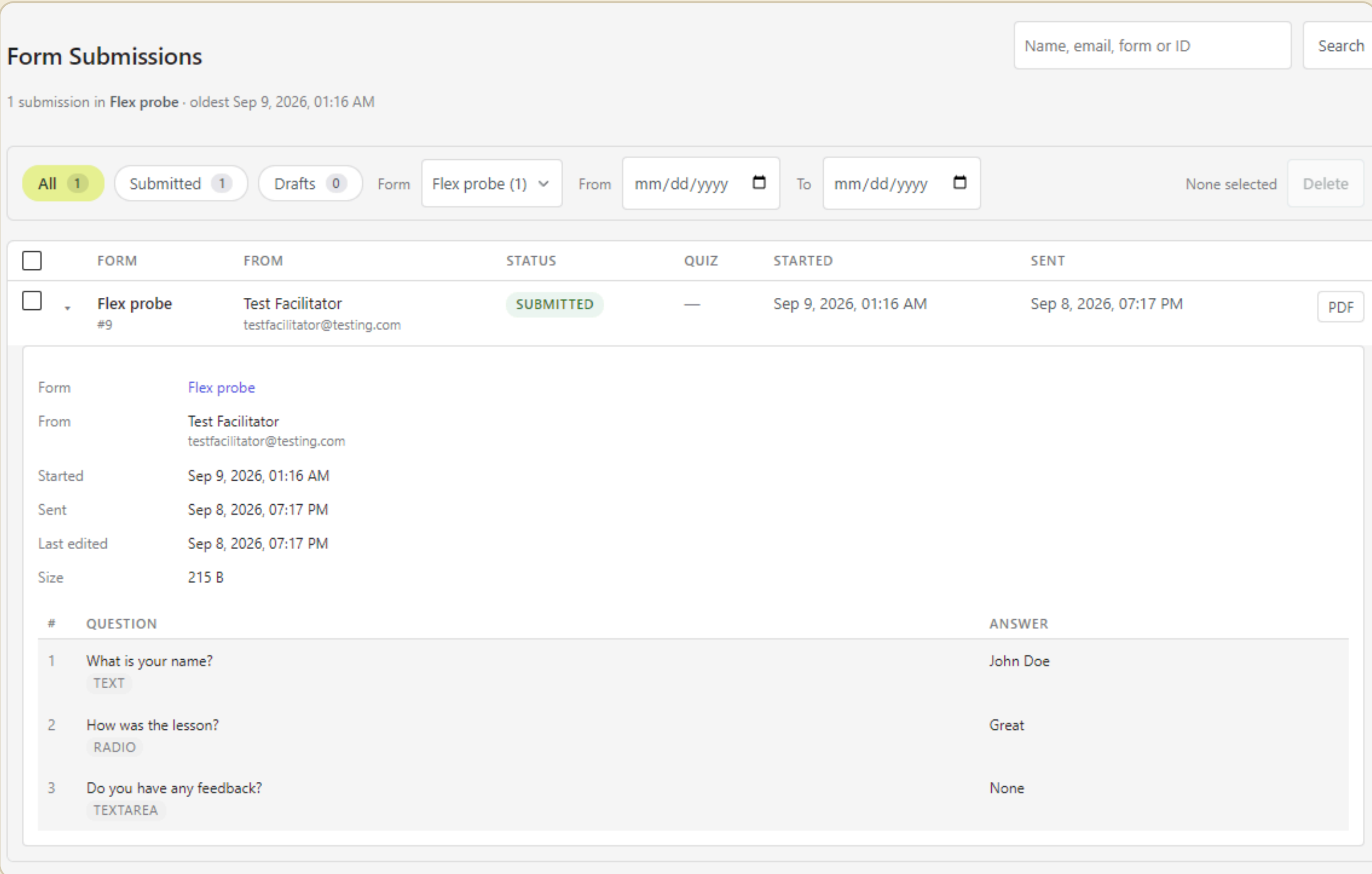
4. They receive a confirmation that their submission was received
5. The submission appears in their customer profile under **Submissions** — they can view what they submitted and see the status

From your side:

1. The submission appears under **Offers → Form Submissions** in your admin
2. You can expand it in place to see every question and answer, any uploaded files, and the quiz score if applicable
3. You can download it as a PDF for your records or to pass on to someone else

Managing submissions

Everything that has come in through any of your forms is on one screen: **Offers → Form Submissions**, directly under Forms in the sidebar.



Submissions across every form, with the Submitted / Drafts split as tabs.

Each row shows the form it came from, who submitted it, whether it is submitted or still a draft, the quiz score if the form is scored, when it was started, and when it was sent.

Getting to one form's submissions

You rarely want *all* submissions — you want the ones from a particular form. There are two ways in:

- **From the Forms list.** Every row carries a **Submissions** link beside its Edit button. It opens this screen with that form already selected, which is how the question actually gets asked: "what came in through the application form?"
- **From the Form dropdown** on the submissions screen itself. It lists only forms that actually *have* submissions, with a count beside each — a dropdown full of forms nobody has filled in is a list of dead ends.

When you arrive from a form, the heading says so: "*24 submissions in Retreat Application*".

The form name on each row is also a link back to the form itself.

Filtering and searching

- **Tabs** — All, Submitted, Drafts, each with a count. See below for why this split matters
- **Form** — narrow to one form
- **From / To** — a date range
- **Search** — by name, email, form title, or submission number

Reading a submission

Click the arrow at the start of a row to expand it **in place** and see every question with the answer given, in the order the form asked them. Uploaded files are listed with links. On a scored form each answer is marked, and questions with no correct answer configured are shown as unmarked rather than as wrong.

Questions are shown as they were worded when the person answered. Flowworx stores the form's structure alongside each submission, so editing a form later — rewording a question, removing one — never retitles what somebody already answered.

> 📌 *For older submissions taken before that was recorded, the answers are all still there but the questions show as field types rather than as your wording. The panel says so rather than looking broken.*

PDF on each row downloads that single submission as a formatted document.

Drafts and submitted forms

A submission row is created the moment a visitor **first saves**, not when they send. So the screen has two kinds of row:

- **Draft** — saved and still being filled in. Shown dimmed
- **Submitted** — sent

> 📌 **The number of rows is not the number of submissions.** A long form accumulates a lot of drafts from people who started and did not finish, so the row count and "how many came in" are different numbers. That is exactly why the split leads as tabs rather than hiding in a filter — read the **Submitted** count, not the total.

A client who saved a draft sees it in their profile as something they can return to and finish.

Deleting submissions

Select rows with the checkboxes and use **Delete**. Deletion is permanent — there is no trash to recover from — so it is worth exporting anything you might need first.

As on every Flowworx list, the selection is **per page**: changing page, tab, filter or search clears it, so a delete can never quietly include rows you can no longer see.

> 📌 *Submissions of a deleted form are kept and stay readable — they are labelled with the form's number rather than its name. Deleting a form does not destroy what people sent you through it.*