Access:

- You will receive a **shared** “department” login to FORMSTACK.
- You will only have access to your “department’s” forms.

**Note:** Anyone with that **“login”** will see all the forms and submissions for your department.

Support:

- **Otis Website:** [http://www.otis.edu/web-forms](http://www.otis.edu/web-forms)
- **FORMSTACK Guides:** https://support.formstack.com/
- **Person:** Jean-Marie Venturini ([jventurini@otis.edu](mailto:jventurini@otis.edu))
Overview of web-form activity . . .

Go to Web-Forms

Support Guides

User Profile

New Features Alerts
Forms are organized into folders and subfolders. Hover cursor over form title to activate secondary menu.

- Folders created for departments and offices
- Select to create new form
- Select to “Build” to edit existing form
- Select to go to form “analytics”
- Select “Publish” for link to send out or post web-form for users
- Select “Settings” to set up email notifications, user confirmations, approvals, + redirects.

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Main navigation for each form repeats at the top:

- Build + Conversion Kit + Settings + Publish + Submissions + Analytics

Drag + Drop fields to build form

“Description Area” is for instructional text + images

You have access to custom themes + general themes.
If you change part of a theme on one form – it changes other forms that use the same theme.
Forms are saved automatically as you work.

When select a field in the webform, left menu shows features and options for that field.

Select “View Live Form” to check webform as you build.
Create custom form URLs.

When form is no longer needed – “disable” form – it moves into an Archive Folder.

Click to create custom web form messages.
Most often all you need to make your form available is under “Quick Start.”

Link to this form on your website or email:

https://otiscolege.formstack.com/forms/mentoring_invoice

or

Embed this form on your website:

Unsure how to embed this form on your website? Let us help!

Read more about embedding your form
On the left . . .

- Create custom "filtered" reports.
- Share submissions with others.
- Customize view.
- Export data.

On the right . . .

- Filter for specific information.
- Mark checkbox next to specific submissions > can export specific submissions, mark submissions, or delete.
- Select "Sharing" to share submission data with others.
- Customize Submissions view.

You can . . .

- Create custom "filtered" reports.
- Share submissions with others.
- Customize view.
- Export data.
Tracks traffic on your webform automatically.

### Acquisition

- Referral
- Source/Medium
- AdWords
- Campaign Name
- Keyword

### Behavior

- Field Bottlenecks

### Formstack Analytics

<table>
<thead>
<tr>
<th>Top Referrals</th>
<th>Conversion Rate</th>
<th>Abandonment Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>59</td>
<td>67.8%</td>
<td>32.2%</td>
</tr>
</tbody>
</table>

#### Form Bottlenecks

- Alternate Phone Number: 28.57%
- Cell Phone Number: 28.57%
- X-Number (Oct. 10): 28.57%
- I plan to bring – number of guests: 14.29%
Advanced Features

Contact Jean-Marie Venturini (jventurini@otis.edu) for:

- Web-Form Themes
- Calculation Fields
- Web-Form Approvals
- Conditional Logic
- Filtering Submissions
- Manipulating Charts
- Any other questions you may have!