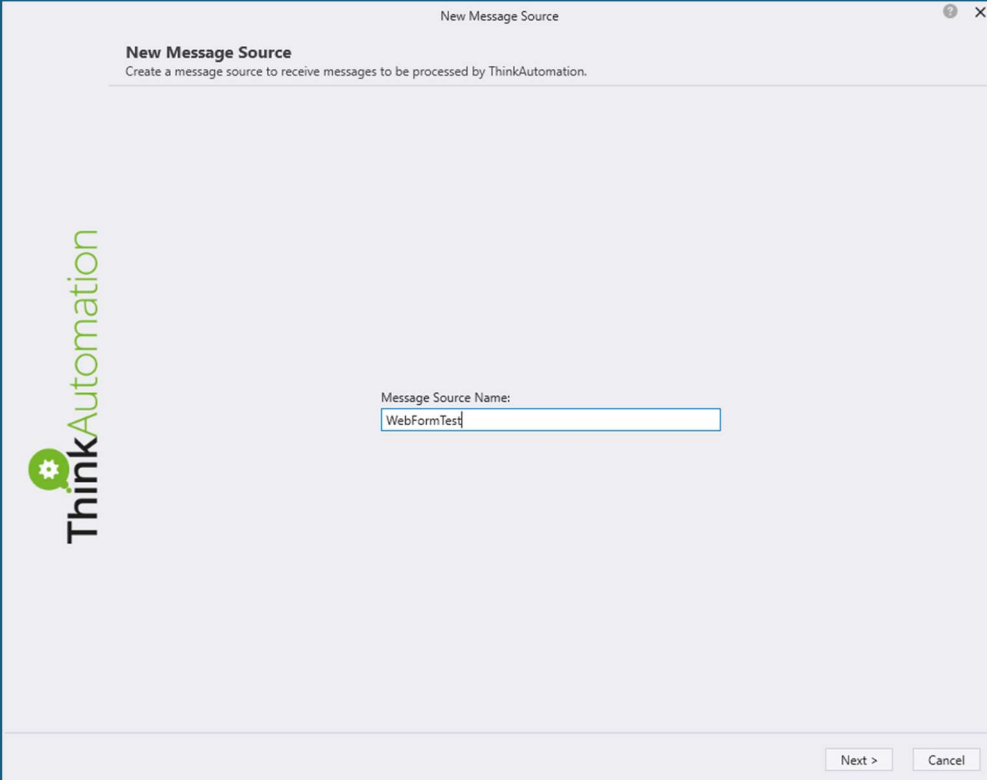


# HOW TO CREATE A WEB FORM

## 1. Create a new Message Source



New Message Source

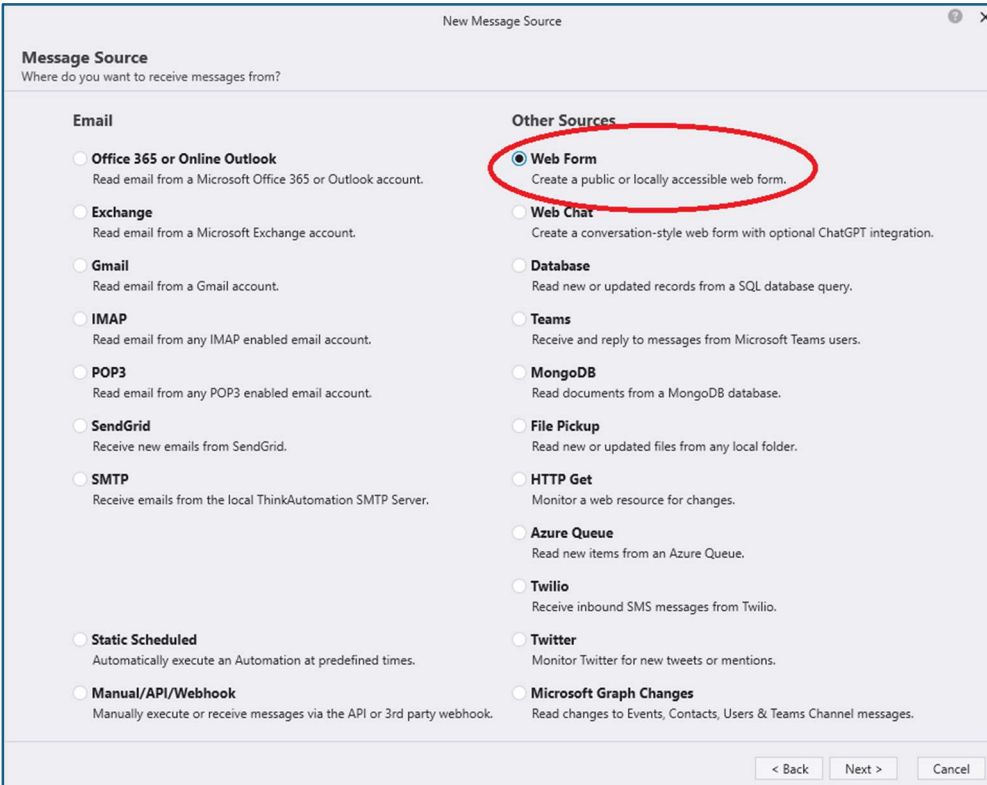
ThinkAutomation

Message Source Name:

WebFormTest

Next > Cancel

## 2. Select Web Form from Other Sources



New Message Source

Message Source

Where do you want to receive messages from?

**Email**

- ☐ Office 365 or Online Outlook  
Read email from a Microsoft Office 365 or Outlook account.
- ☐ Exchange  
Read email from a Microsoft Exchange account.
- ☐ Gmail  
Read email from a Gmail account.
- ☐ IMAP  
Read email from any IMAP enabled email account.
- ☐ POP3  
Read email from any POP3 enabled email account.
- ☐ SendGrid  
Receive new emails from SendGrid.
- ☐ SMTP  
Receive emails from the local ThinkAutomation SMTP Server.
- ☐ Static Scheduled  
Automatically execute an Automation at predefined times.
- ☐ Manual/API/Webhook  
Manually execute or receive messages via the API or 3rd party webhook.

**Other Sources**

- ☒ Web Form  
Create a public or locally accessible web form.
- ☐ Web Chat  
Create a conversation-style web form with optional ChatGPT integration.
- ☐ Database  
Read new or updated records from a SQL database query.
- ☐ Teams  
Receive and reply to messages from Microsoft Teams users.
- ☐ MongoDB  
Read documents from a MongoDB database.
- ☐ File Pickup  
Read new or updated files from any local folder.
- ☐ HTTP Get  
Monitor a web resource for changes.
- ☐ Azure Queue  
Read new items from an Azure Queue.
- ☐ Twilio  
Receive inbound SMS messages from Twilio.
- ☐ Twitter  
Monitor Twitter for new tweets or mentions.
- ☐ Microsoft Graph Changes  
Read changes to Events, Contacts, Users & Teams Channel messages.

< Back Next > Cancel

3. Give your form a Title.
  - a. Click the Add button to create your first field, ie FullName (can't have spaces, just characters and numbers)
  - b. Give the field a label (how you want it to display on the form) ie Full Name
  - c. Select Label Placement (where you want to display) ie Top
  - d. Select Field Type from the drop down menu (for name, you'd choose Text)
  - e. Click OK

The screenshot shows the 'Configure Web Form Message Source' dialog box. The main dialog has a title bar 'New Message Source' and a subtitle 'Configure the message source properties.' It contains several sections: 'Form Title' with the value 'Web Form Test', 'Customize:' with a 'Form Fields' section containing an 'Add' button, 'Wait For Automation:' with a 'Wait For' checkbox, 'Public Form URL:' with a URL, 'Local Form URL:' with a URL, and 'Friendly Path:' with a text input. An 'Edit Survey Field' sub-dialog is open in the center, showing the 'General' tab. It has fields for 'Field Name' (FullName), 'Label' (Full Name), 'Label Placement' (Top), 'Help Text', 'Field Type' (Text), 'Input Mask', 'Max Length' (1000), 'Max Lines' (1), and 'Assign Value To' (Add To Message Body). The sub-dialog has 'OK' and 'Cancel' buttons. The main dialog also has 'OK' and 'Cancel' buttons at the bottom right.

4. Continue to add the remaining fields you require, ie address
  - a. Tick the Wait For Automation button
  - b. Click Preview to see how your form will appear

New Message Source

### Configure Web Form Message Source

Configure the message source properties.

Form Title:


Customize:

Form Fields Header Footer Confirmation Message Submit Button Theme Redirect WhosOn Live Chat

+ Add Edit Delete Up Down

FullName	Text	HouseNo	Text	Street	Text	Town	Text
CityCounty	Text	Postcode	Text				

Wait For Automation: ☒ Wait For & Include Automation Return Value With The Confirmation Message

Local Preview 

Public Form URL:  Copy

Local Form URL:  SSL Copy View

Friendly Path:  Verify

< Back Next > Cancel

5. This is what your preview will look like

## Web Form Test (disabled)

Full Name

House Number/Name

Street

Town

City/County

Postcode

[Submit](#) [Reset](#)

6. Click the Theme button to change your theme colour and background/size etc
7. Click the Redirect button to make a website pop-up on submission of the form – enter the required URL
8. Click Next, then select New Automation/Finish
9. This is what your automation may look like:-

```
1 // Automation Actions Follow
2 // Extract Web Form Data
3 TrelloURL =
4 FullName = Extract Field From %Msg_Body% Json Path "FullName" (String)
5 HouseNo = Extract Field From %Msg_Body% Json Path "HouseNo" (Number)
6 Street = Extract Field From %Msg_Body% Json Path "Street" (String)
7 Town = Extract Field From %Msg_Body% Json Path "Town" (String)
8 County = Extract Field From %Msg_Body% Json Path "County" (String)
9 PostCode = Extract Field From %Msg_Body% Json Path "PostCode" (String)
10 TrelloURL = Create Web Form Redirect To URL "https://tr[REDACTED]ng"
```