NewgenONE

Interface Designer

User Guide

Version: 2024.2

Disclaimer

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Contents

Preface

This chapter provides information about the purpose of this guide, details on the intended audience, revision history, and related documents for NewgenONE Interface Designer.

Revision history

Revision date	Description
November 2024	Initial publication

About this guide

This guide explains the steps to develop and publish portals using the NewgenONE Interface Designer. It describes how an application developer or a business user can carry out prototyping of mobile and web-based portals. It also describes how to design forms and surveys.

To ensure you are referring to the latest and most recent revision of this guide, download it from one of the following locations:

- Newgen Internal Doc Portal, if you are a Newgen employee.
- Newgen Partner Portal, if you are a Newgen partner.

Intended audience

This guide is intended for designers, application developers, and business users who design login portals, forms, and surveys to be consumed by end users. The reader must have a beginner-level understanding of user interface (UI) terms like text box, dropdown, radio button, and more. The user must also be comfortable with drag-and-drop-based designing and configuring properties for each UI element using visual settings. The user must have the necessary rights to access the NewgenONE Interface Designer module.

You must have a working knowledge of the following:

- The fundamentals and standard practices of your business area.
- NewgenONE Automation Studio
- NewgenONE Data Model Designer
- NewgenONE Process Designer
- NewgenONE Developer Guide

Related documents

The following documents are related to NewgenONE Interface Designer:

- NewgenONE Overview Guide
- NewgenONE Automation Studio User Guide
- NewgenONE Data Model Designer User Guide
- NewgenONE Process Designer User Guide
- NewgenONE Deployment Admin User Guide
- NewgenONE Configuration Guide
- NewgenONE Developer Guide
- NewgenONE Microservices Developer Guide

Documentation feedback

To provide feedback or any improvement suggestions on technical documentation, write an email to docs.feedback@newgensoft.com.

To help capture your feedback effectively, share the following information in your email:

- Document name
- Version
- Chapter, topic, or section
- Feedback or suggestions

Introduction

NewgenONE Interface Designer allows you to create, publish, and manage web-based portals and forms. It provides the capability to build progressive web applications (PWAs). Its extensive library comprises a range of components such as controls, data objects, themes, and more needed to build feature-rich portals and forms having basic to high-level layouts. Being a low-code platform, it empowers an application developer to execute faster development of portals with minimal coding effort.
With Interface Designer, you can design highly effective surveys that meet your business needs and help you collect a wide range of feedback from individuals.

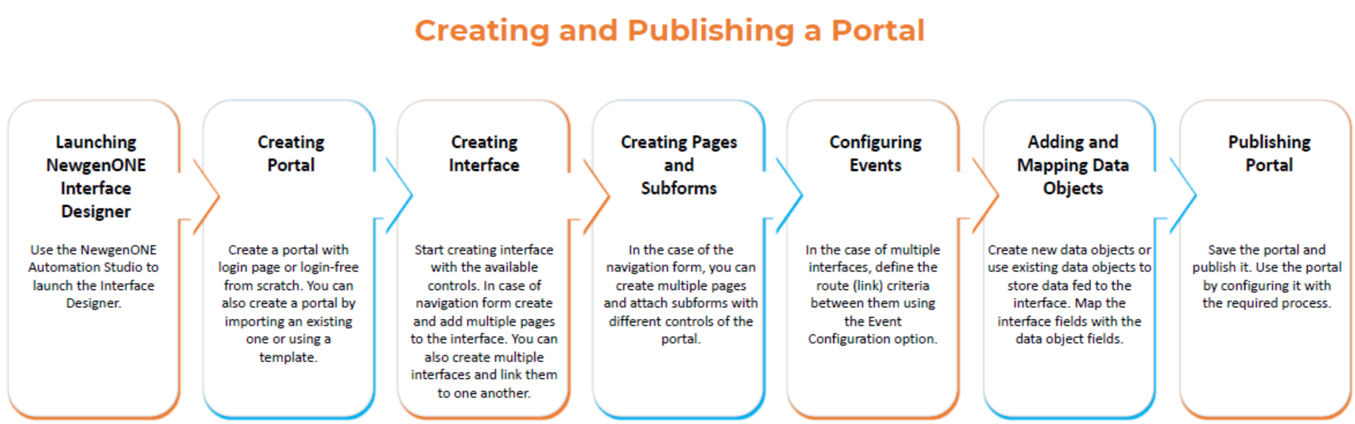
Additionally, NewgenONE Interface Designer supports NonVisual Desktop Access (NVDA) version 2024.1 (2024.1.0.31547). This screen reader assists visually impaired users by reading aloud web content and helping navigate interfaces or fill out forms. To use this feature, NVDA must be installed on your computer.

Following are the key features of the NewgenONE Interface Designer:

Feature	Description
Drag and drop controls	Allows you to drag and drop the required types of controls on the canvas for designing the portals and forms.
Controls set	Allows you to use diverse control sets such as text box, dropdown, multiselect, table, list view, advance list view, tabs, section, radio button, checkbox, paragraph, label, link, image carousel, horizontal and vertical navigation, and more for designing of portal and forms.
Event configuration	Allows you to configure event actions on various conditions such as, on focus, on lost focus, on change, and on multiple key presses for the different form controls.
Availability of templates	Allows you to develop portals rapidly using predefined portal templates (example, banking), form templates (example, account opening), and page templates (example, personal details). This helps to reduce the workload, maintain consistency and uniformity among the portals and pages, and increase efficiency.

Feature	Description
Data model driven designing	Allows you to access all the data models available within the signed-in cabinet and eliminate the need to create the data models and form fields separately.
Previewing portal	Allows you to generate a preview of the portal for reviewing review the look and feel and usability of the created portal.
Support for customized Cascading Style Sheet (CSS)	Allows you to modify the CSS or incorporate custom CSS according to the business requirement.
Support for Progressive Web Applications (PWAs)	Allows you to create PWAs, thus eliminating the need to publish them on app stores. Consequently, businesses no longer have to undergo the lengthy and tedious application store submission process.
Hamburger control	Allows you to display and hide the side navigation on the UI.
Publishing interface in common repository	Allows you to publish the interface(s) in a common repository and then associate these interfaces with portals or processes. This results in faster portal or process development by utilizing a common UI across portals and processes.

The basic steps involved in creating and publishing a portal using NewgenONE Interface Designer are:



Getting started

This chapter describes how to access the NewgenONE Interface Designer module and walks you through the UI of its landing page.

The chapter includes the following topics:

- Accessing Interface Designer
- Exploring the Interface Designer interface

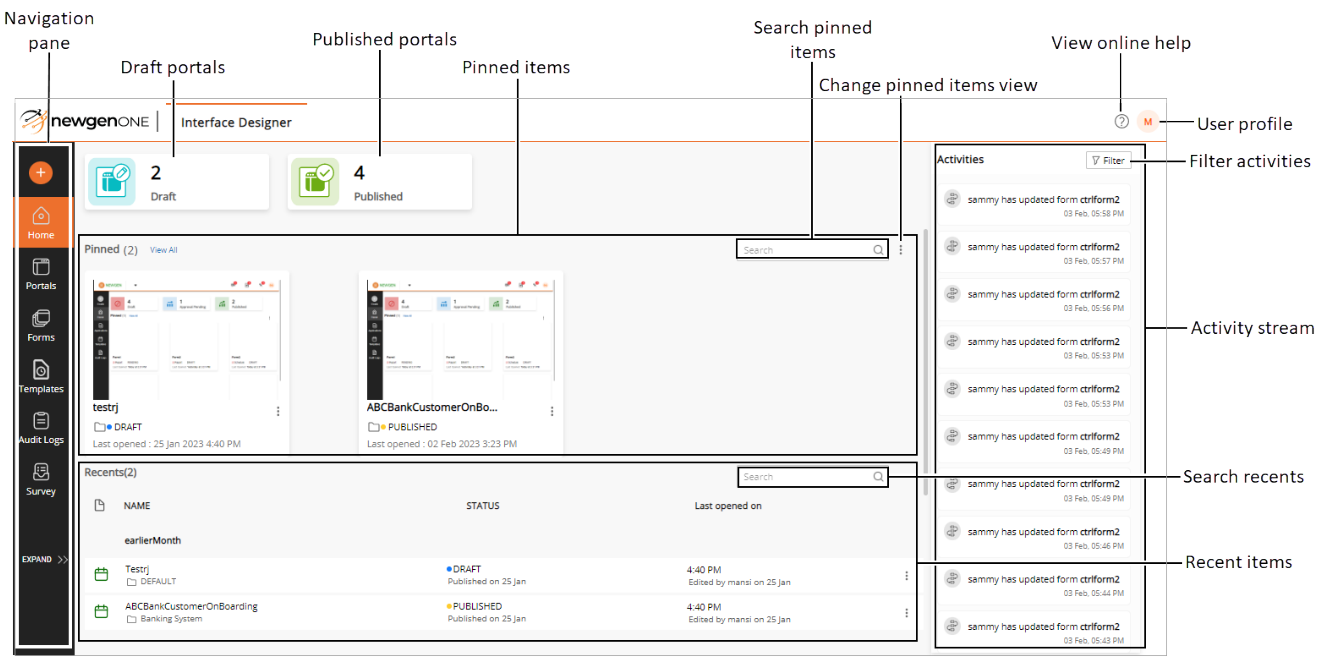
Accessing Interface Designer

To access the NewgenONE Interface Designer module, follow the below steps:

1. Sign in to the NewgenONE Automation Studio using your valid user credentials. For more details, refer to the *NewgenONE Automation Studio User Guide*.
   On successful sign in, the Automation Studio home page appears.
2. Click **View All** against **Design Tools** and then select **Interface Designer**. The Interface Designer opens in a separate browser tab.

Exploring the Interface Designer interface

On successful sign in, the Interface Designer module lands on the Home tab. It displays the live count of draft and published portals. Additionally, the home tab features a list of pinned and recently actioned items.



The Home tab of the Interface Designer includes the following elements:

Element	Description
Navigation pane	Allows you to navigate between different tabs of Interface Designer. The navigation pane includes the following: • Portals • Forms • Templates • Audit Logs • Survey
Draft portals	Displays the number of portals in the draft state. Click to view the list of draft portals.

Element	Description
Published portals	Displays the number of published portals. Click to view the list of draft portals.
Pinned items	Displays the items pinned to the home tab for easy access. Click the required portal to view its design. Click **View All** to view complete list of the pinned items.
Search pinned items	Search the pinned item by name.
Change pinned items view	Click the ellipses icon ⋮ to change the view of pinned items list. Select: • **Tile View** — Displays the list of pinned items in the form of tiles • **List View** — Displays the list of pinned items in the form of a list
Recent items	Displays the list of recently actioned items. Click the required portal to view its design.
Search recents	Search the recently actioned item by name.
Activity stream	Lists the recent activities performed on the portal, forms, and surveys managed in the cabinet.
Filter activities	Use the Filter option to filter the activities based on the artifact type, artifact name, and the executioner. For procedural details, refer to the Filtering activities section.
View online help	Redirects to online help of the NewgenONE Interface Designer.
User profile	Click the user profile icon to view the signed in user details and settings. Use the logout option, to sign out from all the active sessions of the NewgenONE Interface Designer.,

Filtering activities

To filter the activities, follow the below steps:

1. Click the **Filter** button. The Activity Filters dialog appears.
2. From the **Artifact Type** dropdown, select the checkbox against the required artifact. The available options are:
   - Interface Category
   - Portals
   - Templates Category
   - Templates
   - Forms
3. From the **Artifact Name** dropdown, select the required artifact.
4. From the **Action Performed By** dropdown, select the checkbox against the required username. You can use the search box to search the user by name.
5. Click **Apply** to apply the specified filters and sort the activities list accordingly.

You can apply filters separately, and in different combinations to filter the activities list.

Working with Portals

A portal is a web-based platform that displays the information and links collected from various sources to the end user. Portals can be of different types depending on the business requirement.

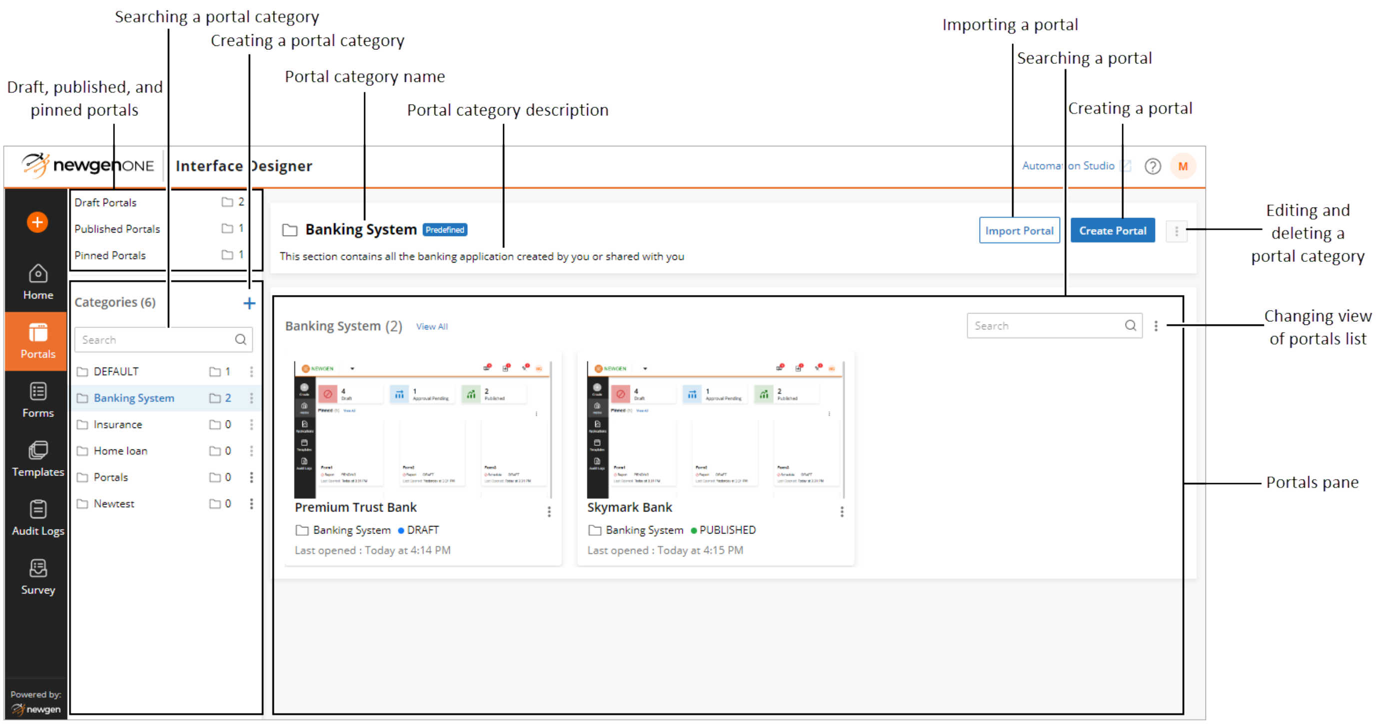
The portals tab allows you to create, import, and manage portals. You can also segregate them into different categories based on their business purpose.

For example, a developer wants to create a portal to facilitate the customer onboarding process for opening a bank account. Using the Portals tab in NewgenONE Interface Designer, the developer has several options to create a new portal, such as importing an existing one, creating it from scratch, or selecting a pre-defined portal template that enables faster and more efficient building of portals.

In the context of NewgenONE Interface Designer, a portal and a form are fundamental components of user interfaces, and can be designed using a unified interface.

- **Portals** — A portal is a digital space or interface through which users interact with a collection of information, data, or applications. It can be of the following types:
    - **Single page portal** — This type of portal consists of a single page or screen where users can access information or perform tasks.
    - **Collection of multiple forms and subforms** — This type of portal consists of multiple forms and subforms that are interconnected, allowing users to navigate between different functionalities and data views.
- **Forms** — A form is a structured user interface used for data entry, data display, or user interaction. It can be of the following types:
    - **Single page form** — This form consists of a single page or screen. Users can interact with and input information on a single interface.
    - **Collection of multiple subforms** — This form is composed of multiple subforms. Each subform has its unique purpose or set of fields, allowing for more complex data entry or interactions.
      For detailed information on how to design forms, refer to the Working with forms section.

Interface Designer allows you to use a single set of controls and data objects to create different types of interfaces.



The Portals tab consists of the UI elements:

Element	Description
Portal categories pane	Displays the list of portal categories and the number of portals listed within each category. The predefined tag indicates that the category is system-defined, and cannot be edited or deleted. Select the required category to view the complete list of portals available within it.
Searching a portal category	Allows you to search a portal category by name.
Creating a portal category +	Allows you to create a new portal category. For procedural details, refer to the Creating a portal category section.
Portal category name	Displays the name of the portal category.
Portal category description	Displays the description of the portal category.
Editing and deleting a portal category ⋮	Allows you to edit portal category details and delete a category. For procedural details, refer to the Editing a portal category and Deleting a portal category section.

Element	Description
Portals pane	Display the list of portals listed within the selected portal category. Select the required portal to create, view, or modify the portal design and definition.
Creating a portal	Allows you to create and design a new portal. For procedural details, refer to the Creating a portal section.
Importing a portal	Allows you to import a portal from your local machine. For procedural details, refer to the Importing a portal section.
Searching a portal	Allows you to search a portal by name.
Changing view of portals list ⋮	Allows you to change the view of the list of portals from graphical (tile view) to textual (list view). • **Tile View** — Displays the list of portals in the form of tiles. • **List View** — Displays the list of portals in the form of a list.
Draft, published, and pinned portals	Displays the number of portals in the following: • **Draft Portals** — This state indicates that the portals are in the designing phase. • **Published Portals** — This state indicates that the designing of portals is complete and ready for deployment. Click **Draft Portals** or **Published Portals** to view the complete list of portals available within respective states. Additionally, the number of portals pinned to the Home tab for easy access also appears. Click **Pinned Portals** to view the complete list of portals available within this category.

NewgenONE 2024.2 Interface Designer offers auto-save for panel closures, modal closures, design updates, tab closures, and page navigation. Users are prompted to save when closing tabs, with visual feedback showing data is being saved.

Related topic(s)

- Creating a portal
- Working with forms

Creating a portal category

The purpose of a portal category is to group portals serving similar business purposes together. In this way, you can easily access the required portal and manage the entire list of portals.

To create a portal category, follow the below steps:

1. Click the Create Category + icon present in the portal categories pane. The Create Category dialog appears.
2. In the **Category Name** field, specify the name of the portal category.
3. In the **Description** field, specify a description of the portal category.
4. Click **Create**. The created category gets added to the list.

Related topic(s)

- Editing a portal category
- Deleting a portal category

Editing a portal category

To edit the details of a portal category, follow the below steps:

1. In the Portal categories pane, click the ellipsis icon ⋮ present with the required category and select **Edit**. The Edit Portal Category dialog appears.
2. Make the required changes.
3. Click **Edit**. The portal category gets edited.

Deleting a portal category

To delete the portal category, follow the below steps:

1. In the Portal categories pane, click the ellipsis icon ⋮ present with the required category and select **Delete**. A dialog asking to confirm the deletion appears.

2. Click **Confirm**. The portal category gets deleted.

Creating a portal

The following prerequisites must be met before you start creating a portal:

You must be a member of the below-mentioned groups to create an application.

- Data Model Designer users
- Process Designer users
- Supervisor

The portals tab allows you to create a portal from scratch (using a blank template) or using a predefined template.

Related topic(s)

- Creating a portal from scratch
- Creating a portal using a predefined template
- Working with forms

Creating a portal from scratch

To create a portal from scratch (using a blank template), follow the below steps:

1. Click the **Create Portal** button.
   Alternatively, click the add icon present in the navigation pane. The portal template selection screen appears.
2. Click **Create from scratch**. The portal creation screen appears.
3. From the **Name of Category** dropdown, select the category of the portal.
   Alternatively, click **+ Add New** to add a new category of portals.
4. Specify the name of the portal.
5. Specify a description of the portal.
6. (Optional) Turn on the **Login free Portal** toggle to create a portal without a login page.

> A login-free portal does not require credentials to access restricted sites, pages, and forms.

When you create a portal from scratch, the Blank Template appears selected in the Selected Template section.

> If you want to create a portal using a predefined template, click **Replace** and select the required predefined template from the template selection page. For more information, refer to the Creating a portal using a predefined template section.

7. Click **Create**. The portal gets created.

For more information on designing a portal, refer to the Working with forms section.

Creating a portal using a predefined template

To create a portal using a predefined template, follow the below steps:

1. Click the **Create Portal** button.
   Alternatively, click the add icon present in the navigation pane. The portal template selection screen appears. A list of portal template categories appears on the left side of the screen.
   Selecting **All templates** displays all the templates regardless of category.
2. Click **Preview** to preview the required template before using it for creating the portal.
3. Upon finalization, click **Select this template** to open the template creation screen.
4. From the **Name of Category** dropdown, select the category of the portal.
   Alternatively, click **+ Add New** to add a new category of portal.
5. Specify the name of the portal.
6. Specify a description of the portal.
7. (Optional) Turn on the **Login free Portal** toggle if you want to create a portal without a login page.

> A login-free portal does not require credentials to access restricted sites, pages, and forms.

When you create a portal using a predefined template, the selected template appears in the Selected Template section.

8. Click **Create**. The portal gets created .
   For more information on designing a portal form, refer to the Working with forms section.

Importing a portal

To import a portal definition from your local machine, follow the below steps:

1. In the Portals tab, select the required portal category. The list of portals available within it appears.
2. Click **Import Portal**. The Open dialog appears.
3. Select the portal definition from your local machine and click **Open**.
4. From the **Select a category** dropdown, select the category under which you want to add the portal.
5. Specify the name and description of the portal.
6. (Optional) Turn on the **Login Free Portal** toggle to make the portal login free.
7. Click **Replace** to select a predefined template for a portal or you can keep a blank template that is selected by default.
8. Click **Import Application**. The portal gets imported.
   For more information on designing a portal form, refer to the Working with forms section.

Editing a portal

To edit a portal, follow the below steps:

1. In the Portal categories pane, select the required category. The portals listed within it appear.
2. Click the ellipsis icon ⋮ present with the required portal and select **Edit**. The form builder page specific to the selected portal appears.
3. Make the required changes.
4. Click the **Save** option present in the upper-right corner of the page. The portal gets edited.

Downloading a portal

To download a portal to your local machine, follow the below steps:

1. In the Portal categories pane, select the required category. The portals listed within it appear.
2. Click the ellipsis icon ⋮ present with the required portal and select **Download**. The portal JSON along with the data object definition gets downloaded to your machine in a .zip folder.

Pin and unpin a portal

To pin and unpin a portal to the Home tab, follow the below steps:

1. In the Portal categories pane, select the required category. The portals listed within it appear.
2. Click the ellipsis icon ⋮ present with the required portal and select:
   - **Pin** — to pin the portal to the home tab for easy access.
   - **Unpin** — to unpin the portal from the home tab.

Mapping processes

To map the process with a portal, follow the below steps:

1. In the Portal categories pane, select the required category. The portals listed within it appear.
2. Click the ellipsis icon ⋮ present with the required portal and select **Process Mapping**. The Process Mapping dialog appears.
3. Form the **Process Name** dropdown, select the required process.
4. Click **Add**. The added process appears under the Mapped Process list. Similarly, you can add more processes to map with the portal.
5. Click **Save** to complete process mapping.

Deleting a portal

To delete a portal, follow the below steps:

1. In the Portal categories pane, select the required category. The portals listed within it appear.
2. Click the ellipsis icon ⋮ present with the required portal and select **Delete**. A dialog to confirm deletion appears.
3. Click **Confirm**. The portal gets deleted.

Previewing a portal

To preview a portal, follow the below steps:

1. In the Portal categories pane, select the required category. The portals listed within it appear.
2. Click the ellipsis icon ⋮ present with the required portal and select **Preview**. A preview of the selected portal appears.

Saving a portal

The Save option is present in the upper-right corner of the form builder page. Once you complete the form design, you must save the portal. Also, when you make modifications to an existing portal, ensure saving the changes.
NewgenONE Interface Designer also enables you to save pages, subforms, and portals as templates. These templates can further be used while creating other applications.

Refer to the table below for more information on the save options:

Option	Description
Save Page as Template	Enables you to save the pages created within the portal as templates.
Save Subform as Template	Enables you to save the subforms as templates. These can be attached to various form controls.

Option	Description
Save Portal as Template	Enables you to saving the entire portal design as a template.

You can view the saved templates under the Templates tab of the Interface Designer within different categories.

Related topic(s)

- Save page as template
- Save subform as template
- Save portal as template
- Managing templates for portals, forms, and pages

Saving page as template

The Save Page as Template option is enabled only when you are working on a page.

To save a page as a template, follow the below steps:

1. Click **Save Page as Template**. The Save Page as Template dialog appears.
2. In the **Template Name** box, specify the template name.
3. From the **Category** dropdown, select a category for the template.
4. Turn on the **Keep Data Object Mapping** toggle to save the data mapping along with the template.
5. In the **Template Description** box, specify additional information about the page template.
6. Click **Create**. The page template gets created within the selected category.

Saving subform as template

The Save Subform as Template option is enabled only when you working on a subform.

To save a subform as a template, follow the below steps:

1. Click **Save Subform as Template**. The Save Subform as Template dialog appears.
2. In the **Template Name** box, specify the template name.
3. From the **Category** dropdown, select a category for the template.
4. Turn on the **Keep Data Object Mapping** toggle to save the data mapping along with the template.
5. In the **Template Description** box, specify additional information about the subform template.
6. Click **Create**. The subform template gets created within the selected category.

Saving portal as template

The Save Portal as Template option allows you to save the entire portal as a template.

To save a portal as a template, follow the below steps:

1. Click **Save Portal as Template**. The Save Portal as Template dialog appears.
2. In the **Template Name** box, specify the template name.
3. From the **Category** dropdown, select a category for the template.
4. Turn on the **Keep Data Object Mapping** toggle to save the data mapping along with the template.
5. In the **Template Description** box, specify additional information about the portal template.
6. Click **Create**. The portal template gets created within the selected category.

Validating and publishing a portal

Once you finish designing the portal or form, validate it to identify any potential issues and receive real-time feedback and suggestions. This validation process helps you to maintain consistency throughout the UI design process and adhere to established design standards and accessibility guidelines.

To validate a portal, in the upper-right corner of the form builder canvas, click **Publish**. The portal is validated and then published if no errors occur. Follow the below set of rules to avoid any errors:

- The parent table variables must adhere to predefined formats and defined data types.
- Ensure all frames and indexes are correctly created within the portal.
- Confirm that all used images in the portal exist in the same folder.
- If you are using the Document List control, make sure the document list table name, system-predefined variables, and parameter mapping are properly defined.
- The parent-child relations and tree structure of data variables must be accurately defined, with a connection established through a system-defined key, such as *processinstanceid* in the case of complex array structures. Also, there must be only one parent data object of the portal with system-defined variables.

Related topic(s)

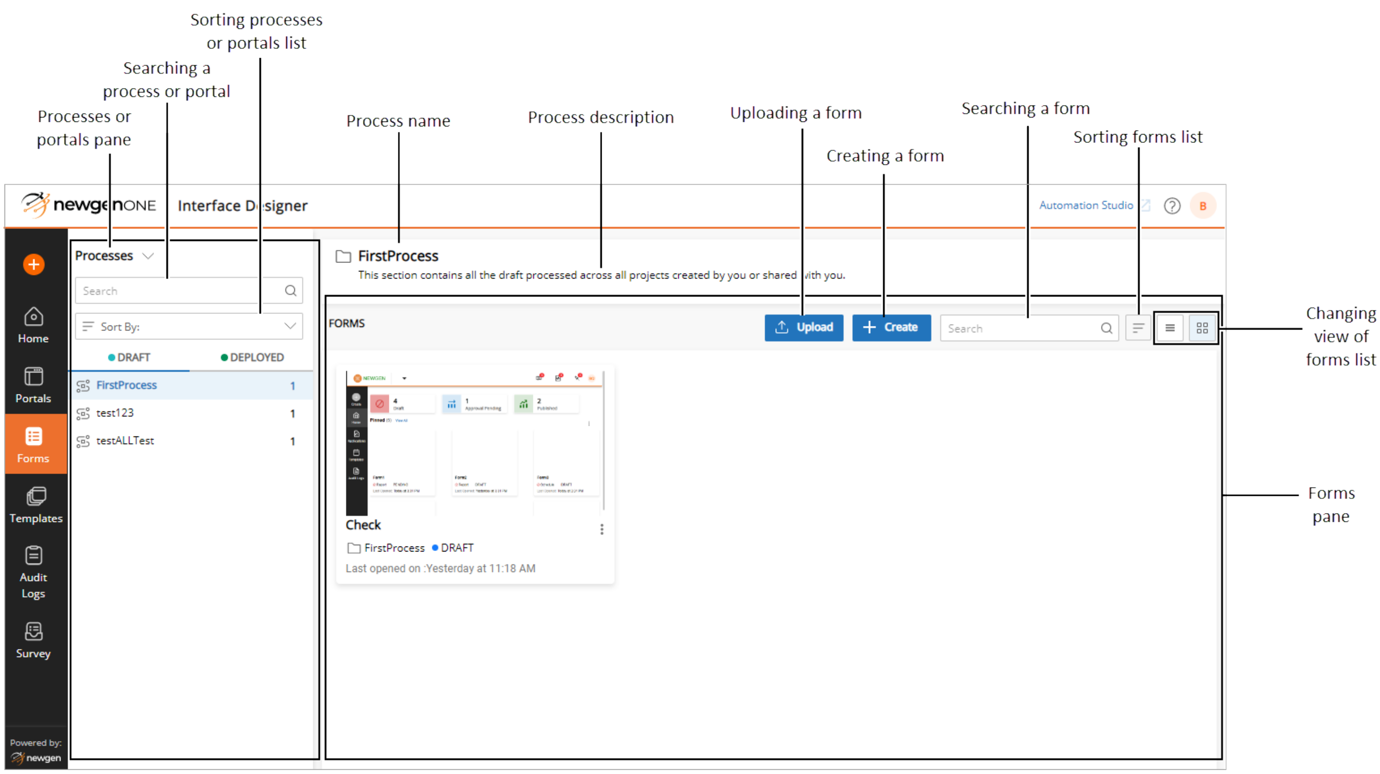
- Creating a form
- Understanding form builder elements

Working with Forms

A form is a graphical user interface that allows you to interact with a software system or application. Its primary purpose is to facilitate the input, display, and modification of data within the system. For example, while applying for a loan, you fill out a form to feed information into the system, NewgenONE Interface Designer allows you to create form layouts as per your business requirements.

The Forms tab allows you to create, upload, and manage forms for portals and processes.

Click the dropdown present in the upper-left corner to view the list of forms associated with the available portals and processes respectively. The processes tab appears by default.



The Forms tab consists of the following UI elements:

Element	Description
Processes or portals pane	Displays the list of processes present in the signed-in cabinet and the number of forms associated with each process by default. Use the dropdown present in the upper-left corner of the processes pane, to switch to the portals pane. It displays the list of portals and the number of forms associated with each portal. Select the required process or portal to view the complete list of pages and forms associated with it.
Searching a process or portal	Allows you to search a process or portal category by name.
Sorting processes or portals list	Allows you to sort the list of processes or portals. The available criteria are: • **Sort Order** selected as **Ascending** and **Sort By** selected as: ◦ **NAME** — Sorts the list of processes or portals in ascending order by name. ◦ **No. of Assets** — Sorts the list of processes or portals list in ascending order of the number of pages and forms listed within it. • **Sort Order** selected as **Descending** and **Sort By** selected as: ◦ **NAME** — Sorts the processes or portals in descending order by name. ◦ **No. of Assets** — Sorts the list of processes or portals in descending order of the number of pages and forms listed within it.
Process or portal name	Displays the name of the process or portal.
Process or portal description	Displays the description of the process or portal.

Element	Description
Pages pane	Displays the list of pages associated with the selected portal. Select the required page to design, view, or modify the page design or definition.
Creating a page	Allows you to create a new page. This option appears for portals only. For procedural details, refer to the Creating a page section.
Uploading a page	Allows you to upload a page. This option appears for portals only. For procedural details, refer to the Uploading a page section.
Forms pane	Displays the list of forms associated with the selected portal or draft process. Select the required form to design, view, or modify the page design or definition.
Creating a form	Allows you to create a new form. This option appears for portals and processes in a draft state. For procedural details, Creating a form section
Uploading a form	Allows you to upload a form. This option appears for portals and processes in draft state. For procedural details, Uploading a form section.
Searching a page or form	Allows you to search a page or form by name.

<table>
<tr><th>Element</th><th>Description</th></tr>
<tr><td>Sorting pages or forms list</td><td>Allows you to sort the list of pages or forms.
The available criteria are:
Sort Order selected as Ascending and Sort By selected as:
Name — Sorts the list of pages or forms in ascending order by name.
Last Modified — Sorts the list of pages or forms in ascending order based on the most recent modifications.
Sort Order selected as Descending and Sort By selected as:
Name — Sorts the list of pages or forms in descending order by name.
Last Modified — Sorts the list of pages or forms in descending order based on the most recent modifications.</td></tr>
<tr><td>Changing view of pages or forms list</td><td>Allows you to change the view of the list of pages or forms:
Tile View — Displays the list of pages or forms in the form of tiles.
List View — Displays the list of pages or forms in the form of a list.</td></tr>
</table>

NewgenONE 2024.2 Interface Designer offers auto-save for panel closures, modal closures, design updates, tab closures, and page navigation. Users are prompted to save when closing tabs, with visual feedback indicating when data is being saved.

Related topic(s)

- Understanding form builder elements
- Creating a form
- Creating a page

Creating a form

You can create a new form for a portal or a process in a draft state.

To create a form, follow the below steps:

1. In the Forms tab, select the required **Portal** or **Draft Process**. The forms listed within the selected portal or process appear.
2. In the Forms subtab, click **Create**. The Create Form dialog appears.
3. In the **Form Name** field, specify the name of the form.
4. Click **Create.** The form gets created and listed within the portal or the process.
   For information on designing, refer to the Understanding form builder elements section.
   For information on publishing a portal, refer to the Publishing a portal section.

Related topic(s)

- Understanding form builder elements
- Uploading a form
- Creating a portal
- Creating a page
- Performing operations on pages and subforms
- Publishing a portal

Understanding Form Builder elements

The Form Builder is the unified interface where the actual designing of portals and forms occurs. It provides end users with access to a diverse set of elements that are integral to the design process. These elements include controls, that allow for the inclusion of various interactive elements such as buttons, input fields, and dropdown menus. Data objects enable the connection to databases or data sources, ensuring that the forms and portals can interact with and retrieve information as needed. Templates provide a framework for the overall layout and structure of the portal or form, helping users get started with a pre-defined design. Themes allow for the customization of the visual style and appearance

This section provides information on the following topics:

- Adding controls
- Adding and managing pages and subforms
- Using templates
- Using common fields
- Defining data objects
- Defining breakpoints
- Configuring themes
- Configuring properties
- Generating preview

Adding controls to a form or portal

Controls are the elements and layout options used for designing forms and portals. The Controls tab is available on the left side of the Form Builder page. Using this tab, you can drag and drop various controls directly onto the design canvas. These controls serve the purpose of incorporating diverse types of fields into your forms or portals. For example, you can use a text box control to add a *Name* field within your form and use a dropdown control to insert a selection-type field such as *Gender*.

The Form Builder offers the following types of controls:

- **Inputs** — These controls allow end users to enter data by typing into the designated fields. For example, a *Name* field requires that users input their names into the corresponding field.
  The available input controls are:
    - Text Box
    - Password
    - Textarea
    - Rich Text Input
    - Date Picker
    - Slider
- **Selection** — These controls allow end users to select one or more predetermined values from the options provided. For example, in the Country field, users must

select their native country.
The available selection-type controls are:

- Multiselect
- Dropdown
- Radio Button
- Checkbox
- Toggle Switch
- Tile
- Picklist

- **Actions** — These controls allow you to link to an external Uniform Resource Locator (URL) or configure actions to occur upon clicking them. For example, clicking the *Next* button redirects users to the next page of the form.
  The available action controls are:
  - Button
  - Link
- **Display Text** — These controls allow you to add informative text within the form. For example, you can include a section called *About the Company* that provides a summary of the company's history and offerings in the form or portal.
  The available display text type controls are:
  - Label
  - Paragraph
- **Grids** — These controls allow you to present or add data in a tabular or spreadsheet format. For example, a table contains columns such as *Country Codes* and *Country Names*, allowing users to select a code corresponding to their chosen country.
  The available grid-type controls are:
  - Table
  - List View
  - Advance List View
  - Document List
- **Media** — These controls enable the addition of images to the form or portal. For example, add a *Gallery* section to your form that displays images related to the organization.
  The available media-type controls are:
  - Image
  - Image Carousel
- **Containers** — These controls enable the segmentation of form or portal into multiple sections, tabs, wizards, or menus. They serve as the initial step in the

design of forms or portals. Prior to adding any other controls to the design canvas, it is necessary to add a container, such as a Section, and subsequently insert other required controls within the section columns. For example, a navigation wizard consists of tabs such as *Basic Details*, *Educational Details*, and *Employment Details*, each of which signifies distinct stages within the form or portal. To introduce other required controls within each of these individual tabs, it is necessary to add a separate section for each one.
The available container-type controls are:
    - Section
    - Tabs-Horizontal
    - Tabs-Vertical
    - Wizard-Horizontal
    - Wizard-Vertical
    - Menu
- **Advanced controls** — These controls offer enhanced functionality and user interaction in web forms or portals.
  The available advanced controls are:
    - Report
    - Iframe
    - Captcha
    - Survey
- **Custom controls** — These controls provide flexibility and customization options beyond what standard, pre-built elements offer. For procedural details on defining and adding custom controls to the form or portal, refer to the Adding custom control section.

Search box — Use this option to search for the required type of control by name.

Adding Text Box field

A text box field allows end users to input text or alphanumeric characters into a designated area. For example, *First Name*.

To add a text box to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.

3. In the Inputs category, select **Text Box** and drag and drop it onto the design canvas. The text box gets added to the canvas and the Quick Properties – TEXTBOX dialog appears.
   It displays the following text box properties:
   - **Label** — Specify the text box field name.
   - **Add Icon** — Add an icon for the text box field that represents its content and purpose.
   - **Mapping** — Map the text box field to a data object field linked with the form or portal.
   - **User Defined ID** — Specify an ID that uniquely identifies the text box field in the system.
   - **Placeholder** — Specify a short hint of the expected input value.
   - **Visible** — Turn on this toggle to display the text box field in the form or portal.
   - **Enable** — Turn on this toggle to enable the text box field in the form or portal.
   - **Mandatory** — Turn on this toggle to make it necessary for the field to be completed before the end user submits the form.
   - Click **View all** to view the complete list of text box properties. For detailed information on configuring text box properties, refer to the Configuring Text Box properties section.
4. Click **Done** to save changes made to the text box properties.
5. Save the form or portal.

Click the text box to view the following options:

Option	Description
Move	Use to move the text box to a different column within the same section.
Settings	Use to open the Properties tab of the text box.
Copy	Use to create a copy of the text box.
Delete	Use to delete the text box.

Configuring Text Box field properties

To access the properties tab for a Text Box, you can use one of the following options:

- In the Quick Properties - TEXTBOX dialog, click **View all**.
- Select the text box on the canvas and then click the gear icon appearing on its boundary.
- Select the text box on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Text Box:

Basic

Field	Description	Value
Label	Use to specify a name for the text box field.	In the **Label** text box, specify the name of the text box field. For example, *First Name*.
Add Icon	Use to add an icon for the text box that represents its content and purpose.	To add an icon for the text box, follow the below steps: 1. In the **Add Icon** field, click the pin icon . 2. Select the required icon image from your local machine. 3. Click **Open**. The Add Icon field displays the name of the selected image file. You can click the cross icon to remove the added icon.

Field	Description	Value
Mapping	Use to associate the text box field with a corresponding data object field. For example, map the *Student Name* field with the *Name* field in the data object."	To map the text box field with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the text box, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.
Placeholder	Use to specify a hint or suggestion of the expected input value. This offers guidance to the end users about the type of information they must enter.	In the **Placeholder** text box, specify a suggestion of the expected input value. For example, for the *Name* field, provide a suggestion such as *Type your full name*.

Behaviour

Field	Description	Value
Visible	Use to specify whether the text box field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the text box field is visible in the form.
Enable	Use to specify whether the text box field must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the text box field in the form.

Field	Description	Value
Mandatory	Use to mark the text box field as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the text box field as mandatory and restrict the end user from leaving it empty. Upon enabling this toggle, the **Error message if not filled** text box appears, displaying the default error message. This message gets displayed if the end-user provides no or incorrect input in the field.
Allow Copying Value	Use to allow copying of values from the text box field.	Turn on the **Allow Copying Value** toggle to enable copying of values from the text box field.
Allow Paste in Textbox	Use to allow pasting of content in the text box field.	Turn on the **Allow Paste in Textbox** toggle to enable allow pasting of content in the text box field.

Input Validations

Field	Description	Value
Input Pattern	Use to select a format or pattern for the end user to input in the text box field. These patterns ensure that data entered by users adheres to a specific format or structure.	From the **Input Pattern** dropdown, select the required input format. The available options are: • Mobile • Pin-Code • Email • Percentage • Currency Dollar ($ 123,456) • Currency Rupees (Rs 1,23,456) • Currency Yen (¥ 123,456) • Currency Euro (€ 123.,456) • Currency Naira (₦ 123,456) • Currency Swiss Franc (123,456 CHF) • Currency Bahamian (B$ 123,456) • U.S. Format (112,456) • Indian Format (1,23,456) • No Zero Padding • Password
Allow Alphabets	Use to allow the input of letters (alphabets) in the text box field.	Turn on the **Allow Alphabets** toggle to allow the input of alphabets in the text box field.

Field	Description	Value
Allow Numerals	Use to allow the input of numbers in the text box field.	Turn on the **Allow Numerals** toggle to allow the input of numbers in the text box field.
Allow Spaces	Use to allow input with spaces in the text box field.	Turn on the **Allow Spaces** toggle to allow input with spaces in the text box field.
Allow Special Characters	Use to allow the input of special characters in the text box field such as @, $, #, and more.	Turn on the **Allow Special Characters** toggle to allow the input of special characters in the text box field. You can use the text box available below this toggle to indicate the specific special characters that you want the end user to input. For example, for an *Email* type input, specify the "@" special character. In this scenario, the user is restricted to using the *"@"* special character only while providing the input.
Character Set	Use to specify the letter case (capitalization) allowed for the content in the text box field.	From the **Character Set** dropdown, select the required letter casing: • **UPPERCASE** — Selecting this option ensures the field captures the input consistently in uppercase, regardless of whether the end-user enters it in lowercase or sentence case. • **LOWERCASE** — Selecting this option ensures the field captures the input consistently in lowercase, regardless of whether the end-user enters it in uppercase or sentence case.
Min Value	Use to specify the minimum value required to be input in the text box field.	In the **Min Value** text box, specify the required minimum value of the expected input. For example, for the *Age* field specify the minimum value as *18*.
Max Value	Use to specify the maximum value required to be input in the text box field.	In the **Max Value** text box, specify the required maximum value of the expected input. For example, for the *Age* field specify the maximum value as *50*.

Field	Description	Value
Max Length	Use to specify the maximum length of data allowed in the text box field.	In the **Max Length** text box, specify the maximum allowed length of data. For example, for the *Mobile* input pattern, specify the maximum length as *10*.
Custom Pattern	Use to define the required input pattern expected from the end-user.	In the **Custom Pattern** text box, specify the required input pattern. For example, for the Mobile input pattern, specify the custom pattern as *9999999999*.

Style

Field	Description	Value
Style Options	Use to select the text box style.	Click the required style to select it. The default selection is *Style 1*.
Label-Value Alignment	Use to set the alignment of the text box label with respect to the value entered in it.	From the **Label-Value Alignment** dropdown, select one of the following options: • **Top-Down** — Aligns the label above its corresponding value. • **Left-Right** — Aligns the label to the left of its corresponding value.
Text Alignment	Use to set the horizontal alignment of the value entered in the text box field.	From the **Text Alignment** dropdown, select one of the following options: • **Left** — Places the value to the left of the text box. • **Center** — Places the value in the center of the text box. • **Right** — Places the value to the right of the text box.
Border Color	Use to specify the color of the text box border.	Specify the text box border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.

Field	Description	Value
Background Color	Use to specify the color of the text box background.	Specify the text box background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Width	Use to specify the width of the text box border.	From the **Border Width** dropdown, select the required text box border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the radius of the text box border.	From the **Border Radius** dropdown, select the required text box border-radius. It ranges from 0 to 15 px.
	Label	
Font Family	Use to set the font of the text box label.	From the **Font Family** dropdown, select the required font of the text box label.
Font Size	Use to set the font size of the text box label.	From the **Font Size** dropdown, select the required font size of the text box label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the text box label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Color	Use to set the color of the text box label.	Specify the text box label color using one of the following optos: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
	Value	

Field	Description	Value
Font Family	Use to set the font of the value entered in the text box field.	From the **Font Family** dropdown, select the required font of the text box field value.
Font Size	Use to set the font size of the value entered in the text box field.	From the **Font Size** dropdown, select the required font size of the text box field value. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the value entered in the text box field.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the color of the value entered in the text box field.	Specify the text box field value color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the text box field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the text box field visible on mobile devices.
On Tabs	Use to specify whether or not the text box is visible when the valuefrom 0 is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the text box field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to set the required space between the text box and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to set the required space between the text box and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to set the required space between the text box and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to set the required space between the text box and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advanced Properties

Field	Description	Value
Tooltip	Use to provide information about the text box field. This content appears when end users hover their mouse pointer over the field.	In the **Tooltip** text box, specify the required content. For example, for a *Password* field, specify the tooltip as *The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s), at least 1 non-alphanumeric character(s) such as *,-,or#*.
Control Description	Use to provide a description of the text box field.	In the **Control Description** text box, specify a brief description of the text box field.

Field	Description	Value
ZoneList	Use to associate a zone with the text box field.	From the **ZoneList** dropdown, select the required zone. For procedural details on how to define a zone, refer to the Defining zone section.
SaveEncrypted	Use to save the data entered into the text box field in an encrypted format.	Turn on the **SaveEncrypted** toggle to save the text box field data in an encrypted format.
AutoComplete	Use to enable the auto-completion feature for the text box field. It assists users in entering text by predicting and suggesting the remaining word or phrase they are typing based on what they have already entered.	Turn on the **AutoComplete** toggle to enable auto-complete for the text box field. Upon enabling this option, the **Query** field appears. In this field, define the query that triggers the auto-complete feature. This query determines the conditions under which the feature provides word and phrase suggestions.
Cache	Use to enable the storing of data in the text box field temporarily.	Turn on the **Cache** toggle to allow caching of data entered in the text box field.
Search	Use to enable data search in the text box field.	Turn on the **Search** toggle to allow data search in the text box field.
Key Count	Use to specify the minimum number of input characters after which the search gets initiated.	In the **Key Count** text box, specify the required minimum input character count.

Events

For information on configuring events with a text box, refer to the Configuring events with form controls section.

Adding Password field

A password field allows the collection of a user's password. It is commonly used in web forms, login pages, and registration forms to ensure the confidentiality and security of a user's credentials. The fundamental purpose of the password field is to hide the characters entered by the user and to store the password securely on the server.

To add a password field to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Inputs category, select **Password** and drag and drop it on the design canvas. The password field gets added to the canvas and the Quick Properties – PASSWORD dialog appears.
   It displays the following password field properties:
   - **Label** — Specify the password field name.
   - **Add Icon** — Add an icon for the password field that represents its content and purpose.
   - **Mapping** — Map the password field to a data object field linked with the form or portal.
   - **User Defined ID** — Specify an ID that uniquely identifies the password field in the system.
   - **Placeholder** — Specify a short hint of the expected input value.
   - **Visible** — Turn on this toggle to display the password field in the form or portal.
   - **Enable** — Turn on this toggle to enable the password field in the form or portal.
   - **Mandatory** — Turn on this toggle to make it necessary for the field to be completed before the end user submits the form.
   - Click **View all** to view the complete list of password properties. For detailed information on configuring password properties, refer to the Configuring Password field properties section.
4. Click **Done** to save changes made to the password properties.
5. Save the form or portal.

Click the password area to view the following options:

Option	Description
Move	Use to move the password field to a different column within the same section.
Settings	Use to open the Properties tab of the password field.
Copy	Use to create a copy of the password field.
Delete	Use to delete the password field.

Configuring Password field properties

To access the properties tab for a Password field, you can use one of the following options:

- In the Quick Properties - PASSWORD dialog, click **View all**.
- Select the password field on the canvas and then click the gear icon appearing on its boundary.
- Select the password field on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Password field:

Basic

Field	Description	Value
Label	Use to specify a name for the password field.	In the **Label** text box, specify the name of the password field. For example, *Password*.

Field	Description	Value
Add Icon	Use to add an icon for the password field that represents its purpose.	To add an icon for the password field, follow the below steps: 1. In the **Add Icon** field, click the pin icon . 2. Select the required icon image from your local machine. 3. Click **Open**. The Add Icon field displays the name of the selected image file. You can click the cross icon to remove the added icon.
Icon Alignment	Use to set the alignment of the icon added to the password field with respect to the entered value.	From the **Icon Alignment** dropdown, select one of the following options: • **Left** — Aligns the icon to the left of the password input field. • **Right** — Aligns the icon to the right of the password input field.
Mapping	Use to associate the password field with a corresponding data object field. For example, map the *Passoword* field with the *Secret Key* field in the data object."	To map a passoword field with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the password field, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.

Field	Description	Value
Placeholder	Use to specify a hint or suggestion of the expected input value. This offers guidance to the end users about the type of information they must enter.	In the **Placeholder** text box, specify a suggestion of the expected input value. For example, for the *Password* field, provide a suggestion such as *Type your password*.

Behaviour

Field	Description	Value
Visible	Use to specify whether the password field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the password field is visible in the form.
Enable	Use to specify whether the password field must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the password field in the form.
Mandatory	Use to mark the password field as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the password field as mandatory and restrict the end user from leaving it empty. Upon enabling this toggle, the **Error message if not filled** text box appears, displaying the default error message. This message gets displayed if the end-user provides no or incorrect input in the field.

Input Validations

Field	Description	Value
View Password Icon	Use to set the visibility of password icon in the form.	Turn on the **View Password Icon** toggle to display the password icon in the form.
Allow Alphabets	Use to allow the input of letters (alphabets) in the password field.	Turn on the **Allow Alphabets** toggle to allow the input of alphabets in the password field.
Allow Numerals	Use to allow the input of numbers in the password field.	Turn on the **Allow Numerals** toggle to allow the input of numbers in the password field.

Field	Description	Value
Allow Spaces	Use to allow input with spaces in the password field.	Turn on the **Allow Spaces** toggle to allow input with spaces in the password field.
Allow Special Characters	Use to allow the input of special characters in the password field such as @, $, #, and more.	Turn on the **Allow Special Characters** toggle to allow the input of special characters in the password field. You can use the text box available below this toggle to indicate the specific special characters that you want the end user to input. For example, for a *Password* type input, specify the "@, &, #" special characters. In this scenario, the user is restricted to using the "@, &, #" special characters only while providing the input.
Character Set	Use to specify the letter case (capitalization) allowed for the content in the password field.	From the **Character Set** dropdown, select the required letter casing: • **UPPERCASE** — Selecting this option ensures the field captures the input consistently in uppercase, regardless of whether the end-user enters it in lowercase or sentence case. • **LOWERCASE** — Selecting this option ensures the field captures the input consistently in lowercase, regardless of whether the end-user enters it in uppercase or sentence case.

Style

Field	Description	Value
Style Options	Use to select the password field style.	Click the required style to select it. The default selection is *Style 1*.
Label-Value Alignment	Use to set the alignment of the password field label with respect to the value entered in it.	From the **Label-Value Alignment** dropdown, select one of the following options: • **Top-Down** — Aligns the label above its corresponding value. • **Left-Right** — Aligns the label to the left of its corresponding value.

Field	Description	Value
Text Alignment	Use to set the horizontal alignment of the value entered in the password field.	From the **Text Alignment** dropdown, select one of the following options: • **Left** — Places the value to the left of the password field. • **Center** — Places the value in the center of the password field. • **Right** — Places the value to the right of the password field.
Border Color	Use to specify the color of the password field border.	Specify the password field border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Background Color	Use to specify the color of the password field background.	Specify the password field background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Width	Use to specify the width of the password field border.	From the **Border Width** dropdown, select the required password field border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the radius of the password field border.	From the **Border Radius** dropdown, select the required password field border-radius. It ranges from 0 to 15 px.
	Label	
Font Family	Use to set the font of the password field label.	From the **Font Family** dropdown, select the required font of the password field label.
Font Size	Use to set the font size of the password field label.	From the **Font Size** dropdown, select the required font size of the password field label. It ranges from 10 to 30 px.

Field	Description	Value
Font Weight	Use to set the font weight of the password field label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Color	Use to set the color of the password field label.	Specify the password field label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
	Value	
Font Family	Use to set the font of the value entered in the password field.	From the **Font Family** dropdown, select the required font of the password field value.
Font Size	Use to set the font size of the value entered in the password field.	From the **Font Size** dropdown, select the required font size of the password field value. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the value entered in the password field.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic

Field	Description	Value
Font Color	Use to set the color of the value entered in the password field.	Specify the password field value color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the password field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the password field visible on mobile devices.
On Tabs	Use to specify whether or not the password is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the password field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the password field and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the password field and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the password field and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the password field and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Adding Textarea

A textarea field allows end users to input and edit multiple lines of text. These fields are useful when you expect users to input paragraphs, essays, or any type of free-form textual content. For example, the *Additional Comments* field.

To add a text area field to the form or portal, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Inputs category, select **Text Area** and drag and drop it on the design canvas. The text area field gets added to the canvas and the Quick Properties – TEXTAREA dialog appears.
   It displays the following text area properties:
   - **Label** — Specify the text area name.
   - **Mapping** — Map the text area to a data object field linked with the form or portal.
   - **User Defined ID** — Specify an ID that uniquely identifies the text area in the system.
   - **Placeholder** — Specify a short hint of the expected input value.
   - **Visible** — Turn on this toggle to display the text area in the form or portal.
   - **Enable** — Turn on this toggle to enable the text area in the form or portal.
   - **Mandatory** — Turn on this toggle to make it necessary for the field to be completed before the end user submits the form.
   - Click **View all** to view the complete list of text area properties. For detailed information on configuring text area properties, refer to the Configuring Text Area properties section.
4. Click **Done** to save changes made to the text area properties.
5. Save the form or portal.

Click the text area to view the following options:

Option	Description
Move	Use to move the text area to a different column within the same section.
Settings	Use to open the Properties tab of the text area.

Option	Description
Copy	Use to create a copy of the text area.
Delete	Use to delete the text area.

Configuring Textarea properties

To access the properties tab for a Textarea, you can use one of the following options:

- In the Quick Properties - TEXTAREA dialog, click **View all**.
- Select the textarea on the canvas and then click the gear icon appearing on its boundary.
- Select the textarea on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Textarea:

Basic

Field	Description	Value
Label	Use to specify a name for the textarea.	In the **Label** text box, specify the name of the textarea. For example, *Address*.

Field	Description	Value
Mapping	Use to associate the textarea with a corresponding data object field. For example, map the *Permanent Address* field with the *Address* field in the data object."	To map the textarea with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the textarea, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.
Placeholder	Use to specify a hint or suggestion of the expected input value. This offers guidance to the end users about the type of information they must enter.	In the **Placeholder** text box, specify a suggestion of the expected input value. For example, for the *Address* field, provide a suggestion such as *Type your complete address*.
Max Character Length	Use to define the maximum character limit allowed in the textarea.	In the **Max Character Length** text box, specify the required character limit. For example, if you set it to *280* characters, the end user gets restricted to enter up to 280 characters including alphabets, numbers, special characters, and spaces.
Show Character Count	Use to display the real-time count of the number of characters entered in the textarea.	Turn on the **Show Character Count** toggle to display the real-time character count of the content entered in the textarea. If you have set a maximum character limit, it also displays the number of characters used out of the maximum allowed length.

Behaviour

Field	Description	Value
Visible	Use to specify whether the textarea must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the textarea is visible in the form.
Enable	Use to specify whether the textarea must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the textarea in the form.
Mandatory	Use to mark the textarea as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the textarea as mandatory and restrict the end user from leaving it empty. Upon enabling this toggle, the **Error message if not filled** text box appears, displaying the default error message. This message gets displayed if the end-user provides no or incorrect input in the field.
Allow Copying Value	Use to allow copying of values from the textarea.	Turn on the **Allow Copying Value** toggle to enable copying of values from the textarea.
Allow Paste in Textbox	Use to allow pasting of content in the textarea.	Turn on the **Allow Paste in Textbox** toggle to enable allow pasting of content in the textarea.

Input Validations

Field	Description	Value
Allow Alphabets	Use to allow the input of letters (alphabets) in the textarea.	Turn on the **Allow Alphabets** toggle to allow the input of alphabets in the textarea.
Allow Numerals	Use to allow the input of numbers in the textarea.	Turn on the **Allow Numerals** toggle to allow the input of numbers in the textarea.
Allow Spaces	Use to allow input with spaces in the textarea.	Turn on the **Allow Spaces** toggle to allow input with spaces in the textarea.

Field	Description	Value
Allow Special Characters	Use to allow the input of special characters in the textarea such as @, $, #, and more.	Turn on the **Allow Special Characters** toggle to allow the input of special characters in the textarea. You can use the text box available below this toggle to indicate the specific special characters that you want the end user to input. For example, for an *Address* field, specify the "," special character. In this scenario, the user is restricted to using the "," special character only while providing the input.
Character Set	Use to specify the letter case (capitalization) allowed for the content in the textarea.	From the **Character Set** dropdown, select the required letter casing: • **UPPERCASE** — Selecting this option ensures the field captures the input consistently in uppercase, regardless of whether the end-user enters it in lowercase or sentence case. • **LOWERCASE** — Selecting this option ensures the field captures the input consistently in lowercase, regardless of whether the end-user enters it in uppercase or sentence case.

Style

Field	Description	Value
Style Options	Use to select the textarea style.	Click the required style to select it. The default selection is *Style 1*.
Label-Value Alignment	Use to set the alignment of the textarea label with respect to the value entered in it.	From the **Label-Value Alignment** dropdown, select one of the following options: • **Top-Down** — Aligns the label above its corresponding value. • **Left-Right** — Aligns the label to the left of its corresponding value.

Field	Description	Value
Text Alignment	Use to set the horizontal alignment of the value entered in the textarea field.	From the **Text Alignment** dropdown, select one of the following options: • **Left** — Places the value to the left of the textarea. • **Center** — Places the value in the center of the textarea. • **Right** — Places the value to the right of the textarea.
Border Color	Use to specify the color of the textarea border.	Specify the textarea border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Background Color	Use to specify the color of the textarea background.	Specify the textarea background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Width	Use to specify the width of the textarea border.	From the **Border Width** dropdown, select the required textarea border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the radius of the textarea border.	From the **Border Radius** dropdown, select the required textarea border-radius. It ranges from 0 to 15 px.
	Label	
Font Family	Use to set the font of the textarea label.	From the **Font Family** dropdown, select the required font of the textarea label.
Font Size	Use to set the font size of the textarea label.	From the **Font Size** dropdown, select the required font size of the textarea label. It ranges from 10 to 30 px.

Field	Description	Value
Font Weight	Use to set the font weight of the textarea label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Color	Use to set the color of the textarea label.	Specify the textarea label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
	Value	
Font Family	Use to set the font of the value entered in the textarea.	From the **Font Family** dropdown, select the required font of the textarea field value.
Font Size	Use to set the font size of the value entered in the textarea.	From the **Font Size** dropdown, select the required font size of the textarea value. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the value entered in the textarea.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic

Field	Description	Value
Font Color	Use to set the color of the value entered in the textarea.	Specify the textarea value color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the textarea is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the textarea visible on mobile devices.
On Tabs	Use to specify whether or not the textarea is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the textarea visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the textarea and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the textarea and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the textarea and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the textarea and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Tooltip	Use to provide information about the textarea field. This content appears when end users hover their mouse pointer over the field.	In the **Tooltip** text box, specify the required content. For example, for a *Address* field, specify the tooltip as *Type your complete address*.
Control Description	Use to provide a description of the textarea field.	In the **Control Description** text box, specify a brief description of the textarea field.
ZoneList	Use to associate a zone with the textarea field.	From the **ZoneList** dropdown, select the required zone. For procedural details on how to define a zone, refer to the Defining zone section.

Events

For information on configuring events with a textarea, refer to the Configuring events with form controls section.

Adding Rich Text Input field

A rich text input field, also known as a rich text editor allows end users to enter and format text in a visually appealing and interactive manner. It enables end users to create and edit text content with formatting options similar to a word processor. For example, a field allowing end users to write a short blog.

To add a rich text input field to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Inputs category, select **Rich Text Input** and drag and drop it on the design canvas. The rich text input field gets added to the canvas and the Quick Properties – TEXTAREA dialog appears.
   It displays the following text area properties:
   • **Label** — Specify the rich text input field name.

- **Mapping** — Map the rich text input field to a data object field linked with the form or portal.
- **Visible** — Turn on this toggle to display the rich text input field in the form or portal.
- **Enable** — Turn on this toggle to enable the rich text input field in the form or portal.
- **Mandatory** — Turn on this toggle to make it necessary for the field to be completed before the end user submits the form.
- Click **View all** to view the complete list of rich text input field properties. For detailed information on configuring rich text input field properties, refer to the Configuring Rich Text Input field properties section.

4. Click **Done** to save changes made to the rich text input field properties.
5. Save the form or portal.

Click the rich text input field to view the following options:

Option	Description
Move	Use to move the rich text input field to a different column within the same section.
Settings	Use to open the Properties tab of the rich text input field.
Copy	Use to create a copy of the rich text input field.
Delete	Use to delete the rich text input field.

Related topic(s)

Formatting text

Configuring Rich Text Input field properties

To access the properties tab for a Rich Text Input field, you can use one of the following options:

- In the Quick Properties - TEXTAREA dialog, click **View all**.
- Select the rich text input field on the canvas and then click the gear icon appearing on its boundary.

- Select the rich text input field on the canvas and then click the gear icon ⚙ present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Rich Text Input field:

Basic

Field	Description	Value
Label	Use to specify a name for the rich text box.	In the **Label** text box, specify the name of the rich text box.
Mapping	Use to associate the rich text box with a corresponding data object field.	To map the rich text box with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the rich text box, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.

Behaviour

Field	Description	Value
Visible	Use to specify whether the rich text box must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the rich text box is visible in the form.
Enable	Use to specify whether the rich text box must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the rich text box in the form.

Field	Description	Value
Mandatory	Use to mark the rich text box as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the rich text box as mandatory and restrict the end user from leaving it empty. Upon enabling this toggle, the **Error message if not filled** text box appears, displaying the default error message. This message gets displayed if the end-user provides no or incorrect input in the field.

Style

Field	Description	Value
Border Color	Use to specify the color of the rich text box border.	Specify the rich text box border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Background Color	Use to specify the color of the rich text box background.	Specify the rich text box background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Width	Use to specify the width of the rich text box border.	From the **Border Width** dropdown, select the required rich text box border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the radius of the rich text box border.	From the **Border Radius** dropdown, select the required rich text box border-radius. It ranges from 0 to 15 px.
Label		
Font Family	Use to set the font of the rich text box label.	From the **Font Family** dropdown, select the required font of the rich text box label.
Font Size	Use to set the font size of the rich text box label.	From the **Font Size** dropdown, select the required font size of the rich text box label. It ranges from 10 to 30 px.

Field	Description	Value
Font Weight	Use to set the font weight of the rich text box label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the color of the rich text box label.	Specify the rich text box label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the rich text box is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the rich text box visible on mobile devices.
On Tabs	Use to specify whether or not the rich text box is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the rich text box visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required space between the rich text box and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Field	Description	Value
Spacing Right	Use to provide the required space between the rich text box and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required space between the rich text box and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required space between the rich text box and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Tooltip	Use to provide information about the rich text box. This content appears when the end users hover their mouse pointer over the field.	In the **Tooltip** text box, specify the required content. For example, for a *Password* field, specify the tooltip as *The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s), at least 1 non-alphanumeric character(s) such as *,-,or#.*
Control Description	Use to provide a description of the rich text box.	In the **Control Description** text box, specify a brief description of the rich text box.

Adding Date Picker field

A date picker field allows users to input dates. For example, Date of Birth, Date of Joining, Check-in Date, and more.

To add a date picker field to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Inputs category, select **DatePicker** and drag and drop it on the form canvas. The date picker field gets added to the canvas and the Quick Properties – DATEPICKER dialog appears.
   It displays the following date picker field properties:
   - **Label** — Specify the date picker field name.
   - **Mapping** — Map the date picker field to a data object field linked with the form or portal.
   - **Styles** — Select the required date picker style from the available options.
   - **Visible** — Turn on this toggle to display the date picker field in the form or portal.
   - **Enable** — Turn on this toggle to enable the date picker field in the form or portal.
   - **Mandatory** — Turn on this toggle to make it necessary for the field to be completed before the end user submits the form.
   - Click **View all** to view the complete list of date picker field properties. For detailed information on configuring date picker field properties, refer to the Configuring Date Picker field properties section.
4. Click **Done** to save changes made to the date picker properties.
5. Save the form or portal.

Click the date picker field to view the following options:

Option	Description
Move	Use to move the date picker field to a different column within the same section.
Settings	Use to open the Properties tab of the date picker field.
Copy	Use to create a copy of the date picker field.
Delete	Use to delete the date picker field.

Configuring Date Picker properties

To access the properties tab for a Date Picker, you can use one of the following options:

- In the Quick Properties - DATEPICKER dialog, click **View all**.
- Select the date picker on the canvas and then click the gear icon appearing on its boundary.
- Select the date picker on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Date Picker:

Basic

<table>
<tr><th>Field</th><th>Description</th><th>Value</th></tr>
<tr><td>Label</td><td>Use to specify a name for the text box field.</td><td>In the Label text box, specify the name of the text box field. For example, First Name.</td></tr>
<tr><td>Mapping</td><td>Use to associate the text box field with a corresponding data object field. For example, map the Student Name field with the Name field in the data object."</td><td>To map the text box field with a data object field, follow the below steps:
In the Mapping field, click the ellipsis icon •••. The Data Class Mapping section appears.
Click the required data object field and then click Map.
You can use the search box to search for the required data object field by name.
Click SAVE.
Once you map a field, the option to UnMap appears. You can use this option to remove the mapping and select a different field instead.</td></tr>
<tr><td>User Defined ID</td><td>Use to allocate a distinctive ID to the text box, making it uniquely identifiable within the system.</td><td>In the User Defined ID text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.</td></tr>
</table>

<table>
<tr><th>Field</th><th>Description</th><th>Value</th></tr>
<tr><td>Type</td><td>Use to specify whether the date picker permits the selection of just the date, or both the date and time.</td><td>In the Type field, select one of the following options:
Date — to allow the selection of date.
Date & Time — to allow the selection of both date and time.</td></tr>
<tr><td>Date Format</td><td>Use to select the date format.</td><td>For a Date type field, select the required Date Format from the dropdown. The available options are:
DD/MM/YYYY
MM/DD/YYYY
YYYY/MM/DD
DD/MMM/YYYY
For a Date & Time type field, select the required Date Format from the dropdown. The available options are:
DD/MM/YYYY, HH:MM
MM/DD/YYYY, HH:MM
YYYY/MM/DD, HH:MM
DD/MMM/YYYY, HH:MM</td></tr>
<tr><td>MinDate</td><td>Use to set a minimum date for the date picker. It restricts the end users from selecting any date preceding the specified minimum date.</td><td>In the MinDate field, click the date picker icon and select the required date.
Alternatively, click the Set today's date as minimum checkbox to specify the current date as the mnimum date.</td></tr>
<tr><td>MaxDate</td><td>Use to set a maximum date for the date picker. It restricts the end users from selecting any date succeeding the specified maximum date.</td><td>In the MaxDate field, click the date picker icon and select the required date.
Alternatively, click the Set today's date as maximum checkbox to specify the current date as the maximum date.</td></tr>
</table>

Field	Description	Value
Default State	Use to define the initial state of the date picker.	Select one of the following options: • **Current Date & Time** — This option configures the date picker to show the current date and time as the starting point when it is first opened. • **None** — This option configures the date picker to have no date and time selected as the initial state when it is initially opened.

Behaviour

Field	Description	Value
Visible	Use to specify whether the text box field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the text box field is visible in the form.
Enable	Use to specify whether the text box field must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the text box field in the form.
Mandatory	Use to mark the text box field as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the text box field as mandatory and restrict the end user from leaving it empty. Upon enabling this toggle, the **Error message if not filled** text box appears, displaying the default error message. This message gets displayed if the end-user provides no or incorrect input in the field.
Allow Manual Input	Use to allow manual input of date in the date-type field.	Turn on the **Allow Manual Input** toggle to allow users to manually enter a date into the date field.

Style

Field	Description	Value
Style Options	Use to select the text box style.	Click the required style to select it. The default selection is *Style 1*.

Field	Description	Value
Label-Value Alignment	Use to set the alignment of the text box label with respect to the value entered in it.	From the **Label-Value Alignment** dropdown, select one of the following options: • **Top-Down** — Aligns the label above its corresponding value. • **Left-Right** — Aligns the label to the left of its corresponding value.
Border Color	Use to specify the color of the text box border.	Specify the text box border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Background Color	Use to specify the color of the text box background.	Specify the text box background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Width	Use to specify the width of the text box border.	From the **Border Width** dropdown, select the required text box border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the radius of the text box border.	From the **Border Radius** dropdown, select the required text box border-radius. It ranges from 0 to 15 px.
	Label	
Font Family	Use to set the font of the text box label.	From the **Font Family** dropdown, select the required font of the text box label.
Font Size	Use to set the font size of the text box label.	From the **Font Size** dropdown, select the required font size of the text box label. It ranges from 10 to 30 px.

Field	Description	Value
Font Weight	Use to set the font weight of the text box label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Color	Use to set the color of the text box label.	Specify the text box label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
	Value	
Font Family	Use to set the font of the value entered in the text box field.	From the **Font Family** dropdown, select the required font of the text box field value.
Font Size	Use to set the font size of the value entered in the text box field.	From the **Font Size** dropdown, select the required font size of the text box field value. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the value entered in the text box field.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic

Field	Description	Value
Font Color	Use to set the color of the value entered in the text box field.	Specify the text box field value color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the text box field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the text box field visible on mobile devices.
On Tabs	Use to specify whether or not the text box is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the text box field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required space between the text box and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required space between the text box and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required space between the text box and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required space between the text box and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Tooltip	Use to provide information about the text box field. This content appears when end users hover their mouse pointer over the field.	In the **Tooltip** text box, specify the required content. For example, for a *Password* field, specify the tooltip as *The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s), at least 1 non-alphanumeric character(s) such as *,-,or#.*
Control Description	Use to provide a description of the text box field.	In the **Control Description** text box, specify a brief description of the text box field.
ZoneList	Use to associate a zone with the text box field.	From the **ZoneList** dropdown, select the required zone. For procedural details on how to define a zone, refer to the Defining zone section.

Events

For information on configuring events with a date picker, refer to the Configuring events with form controls section.

Adding Slider field

A slider field allows you to collect and input numeric values within a specified range. For example, a *Price Range* field, a *Monthly Income* field, and more.

To add a slider field to the form or portal, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Inputs category, select **Slider** and drag and drop it on the design canvas. The slider field gets added to the canvas and the Quick Properties – SLIDER dialog appears.
   It displays the following slider field properties:
   • **Label** — Specify the slider field name.

- **Mapping** — Map the slider field to a data object field linked with the form or portal.
- **User Defined ID** — Specify an ID that uniquely identifies the slider field in the system.
- **Visible** — Turn on this toggle to display the slider field in the form or portal.
- **Enable** — Turn on this toggle to enable the slider field in the form or portal.
- **Mandatory** — Turn on this toggle to make it necessary for the field to be completed before the end user submits the form.
- Click **View all** to view the complete list of slider field properties. For detailed information on configuring slider field properties, refer to the Configuring Slider field properties section.

4. Click **Done** to save changes made to the slider field properties.
5. Save the form or portal.

Click the slider field to view the following options:

Option	Description
Move	Use to move the slider field to a different column within the same section.
Settings	Use to open the Properties tab of the slider field.
Copy	Use to create a copy of the slider field.
Delete	Use to delete the slider field.

Configuring Slider field properties

To access the properties tab for a Slider, you can use one of the following options:

- In the Quick Properties - SLIDER dialog, click **View all**.
- Select the slider on the canvas and then click the gear icon appearing on its boundary.
- Select the slider on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Slider:

Basic

Field	Description	Value
Label	Use to specify a name for the slider field.	In the **Label** text box, specify the name of the slider field. For example, *Income*.
Mapping	Use to associate the slider field with a corresponding data object field. For example, map the *Applicant's Income* field with the *Income* field in the data object.	To map the slider field with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the slider, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.
Minimum Value	Use to define the minimum value of the slider.	In the **Minimum Value** text box, specify the required starting value of the slider. For example, for the *Income* field, specify the minimum value as *10000*.
Maximum Value	Use to define the maximum value of the slider.	In the **Minimum Value** text box, specify the required end value of the slider. For example, for the *Income* field, specify the minimum value as *100000*.

Field	Description	Value
Default Value	Use to define the default value of the slider.	In the **Default Value** text box, specify the required default value of the slider. For example, for the *Income* field, specify the minimum value as *40000*.
Default Unit	Use to define the default unit of the value marked on the slider.	From the **Default Unit** dropdown, specify the required unit. The available options are: • Dollars • Indian For example, for the *Income* field, select the default unit as *Indian*. This adds an Indian rupee symbol (₹) to the slider label.
Set Breakpoint	Use to define the breakpoints of the selected range.	In the **Set Breakpoint** text box, specify the breakpoint as required. For example, specify the breakpoint for the *Income* field, as 5000. As the user adjusts the slider, starting from the minimum value, the slider's value increases by 5000.

Custom Properties

Custom properties allow you to attach additional metadata or functionality to elements like sliders.

To define custom properties for a slider field, follow the below steps:

1. Click **+ Custom Propertie(s)**. The Add Properties dialog appears. It displays the list of previously added custom properties (if any).
2. In the **Property Name** field, specify the name for the custom property.
3. In the **Property Value** field, specify the value of the custom property.
4. Click **+ADD**. The newly added property appears in the section below.
5. *(Optional)* Repeat steps 2 to 4 to add more custom properties.
6. Click **Save and Exit** to save the defined properties and exit the dialog.

Slider Display

Field	Description	Value
Visible	Use to specify whether the slider field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the slider field is visible in the form.

Field	Description	Value
Enable	Use to specify whether the slider field must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the slider field in the form.
Mandatory	Use to mark the slider field as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the slider field as mandatory and restrict the end user from leaving it empty. Upon enabling this toggle, the **Error message if not filled** text box appears, displaying the default error message. This message gets displayed if the end-user provides no or incorrect input in the field.
Manual Input	Use to include a text box alongside the slider field, allowing the end user to input the required value to mark on the slider.	Turn on the **Manual Input** toggle to include a text box alongside the slider field.

Style

Field	Description	Value
Slider		
Active Slider Bar	Use to define the slider's color when it is in an active state.	Specify the active slider bar color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
InActive Slider Bar	Use to define the slider's color when it is in an inactive state.	Specify the inactive slider bar color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.

Field	Description	Value
	Label	
Label Alignment	Use to set the alignment of the slider label.	From the **Label Alignment** dropdown, select one of the following options: • **Left** — Aligns the label to the left above the slider. • **Right** — Aligns the label to the right above the slider.
Font Family	Use to set the font of the slider label.	From the **Font Family** dropdown, select the required font of the slider label.
Font Size	Use to set the font size of the slider label.	From the **Font Size** dropdown, select the required font size of the slider label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the slider label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the color of the slider label.	Specify the slider label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the slider field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the slider field visible on mobile devices.

Field	Description	Value
On Tabs	Use to specify whether or not the slider field is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the slider field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required space between the slider field and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required space between the slider field and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required space between the slider field and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required space between the slider field and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Control Description	Use to provide a description of the Slider field.	In the **Control Description** text box, specify a brief description of the slider field.

Events

For information on configuring events with a slider, refer to the Configuring events with form controls section.

Adding Multiselect field

A multiselect field allows users to select multiple options from a list of choices. For example, a field that allows respondents to select multiple hobbies from a predefined list.

To add a multiselect field to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Selection category, select **Multiselect** and drag and drop it on the design canvas. The multiselect field gets added to the canvas and the Quick Properties – MULTISELECT dialog appears.
   It displays the following multiselect field properties:
   - Select to display the mutilselect field **As a Dropdown** or **As a Checkbox**.
   - **Label** — Specify the multiselect field name.
   - **Add Icon** — Add an icon for the multiselect field that represents its content and purpose.
   - **Mapping** — Map the multiselect field to a data object field linked with the form or portal.
   - **User Defined ID** — Specify an ID that uniquely identifies the multiselect field in the system.
   - **Visible** — Turn on this toggle to display the multiselect field in the form or portal.
   - **Enable** — Turn on this toggle to enable the multiselect field in the form or portal.
   - **Mandatory** — Turn on this toggle to make it necessary for the field to be completed before the end user submits the form.
   - Click **View all** to view the complete list of multiselect field properties. For detailed information on configuring multiselect field properties, refer to the Configuring Multiselect field properties section.
4. Click **Done** to save changes made to the multiselect field properties.
5. Save the form or portal.

Click the multiselect field to view the following options:

Option	Description
Move	Use to move the multiselect field to a different column within the same section.
Settings	Use to open the Properties tab of the multiselect field.
Copy	Use to create a copy of the multiselect field.
Delete	Use to delete the multiselect field.

Configuring Multiselect field properties

To access the properties tab for a Multiselect field (list box), you can use one of the following options:

- In the Quick Properties - MULTISELECT dialog, click **View all**.
- Select the list box on the canvas and then click the gear icon appearing on its boundary.
- Select the list box on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Multiselect field:

Basic

Field	Description	Value
Display Type	Use to specify the presentation style for the multiselect options.	Select one of the following options: • **As a Dropdown** — This option displays the multiselect options within a dropdown list. • **As a Checkbox** — This option displays the multiselect options as checkbox list.
Label	Use to specify a name for the multiselect field.	In the **Label** text box, specify the name of the multiselect field. For example, *Gender*.

Field	Description	Value
Add Icon	Use to allow adding an icon for the multiselect field. This option appears when you select *As a Dropdown* option under Display Type.	Turn on the **Add Icon** toggle to allow adding an icon to the multiselect field.
Upload Icon	Use to add an icon for the multiselect field that represents its content and purpose. This option appears when you turn on the *Add Icon* option.	To add an icon for the multiselect field, follow the below steps: 1. In the **Upload Icon** field, click the pin icon. 2. Select the required icon image from your local machine. 3. Click **Open**. The Add Icon field displays the name of the selected image file. You can click the cross icon to remove the added icon.
Mapping	Use to associate the multiselect field with a corresponding data object field. For example, map the *Student Gender* field with the *Gender* field in the data object."	To map the multiselect field with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the multiselect field, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.

Field	Description	Value
Allow Searching	Use to include a search input field at the top of the dropdown list. When the end users click the dropdown, they can either scroll through the list or start typing in the search input field. The dropdown dynamically filters and displays only the items that match the entered text. This option appears when you select *As a Dropdown* option under Display Type.	Turn on the **Allow Searching** toggle to include a search input field with the dropdown list.

Behaviour

Field	Description	Value
Visible	Use to specify whether the multiselect field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the multiselect field is visible in the form.
Enable	Use to specify whether the multiselect field must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the multiselect field in the form.
Mandatory	Use to mark the multiselect field as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the multiselect field as mandatory and restrict the end user from leaving it empty. Upon enabling this toggle, the **Error message if not filled** text box appears, displaying the default error message. This message gets displayed if the end-user provides no or incorrect input in the field.

Options

You can define options for the multiselect field in the following ways:

- **Create Manually** — Use to manually define the options to be populated in the multiselect field.
  To manually set the multiselect field options, follow the below steps:
  1. Click **Create Manually**.
  2. In the **Option Label 1** field, specify the name of the first option.
  3. *(Optional)* In the **Option Value 1** field, assign a value to the defined label.

4. Similarly, define other options for the multiselect field.
5. Click **+ Add Option** to add more fields for defining the multiselect options.
6. From the **Default Option to be selected** dropdown, select the required option to set as the default selection.

- **Fetch from Database** — Use to retrieve the multiselect options from a database by executing a database query.
  To set up a query for fetching the multiselect options, follow the below steps:
  1. Click **Fetch from Database**.
  2. In the **Database Query** field, specify the query for fetching the mutliselect options.
  3. Select the **Enable Caching** checkbox to allow temporary data storage.

From the **Default Sorting on Options** dropdown, select one of the following options:

- **Ascending** — This option arranges multiselect options in alphabetically ascending order.
- **Descending** — This option arranges multiselect options in alphabetically descending order.

Style

Field	Description	Value
Style Options	Use to select the multiselect field style.	Click the required style to select it. The default selection is *Style 1*.
Label-Option Alignment	Use to set the alignment of the multiselect label with respect to the options.	From the **Label-Option Alignment** dropdown, select one of the following options: • **Top-Down** — Aligns the label above its corresponding options. • **Left-Right** — Aligns the label to the left of its corresponding options.
Border Color	Use to specify the color of the dropdown border.	Specify the dropdown border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.

Field	Description	Value
Background Color	Use to specify the color of the dropdown background.	Specify the dropdown background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Width	Use to specify the width of the dropdown border.	From the **Border Width** dropdown, select the required dropdown border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the radius of the dropdown border.	From the **Border Radius** dropdown, select the required dropdown border-radius. It ranges from 0 to 15 px.
	Label	
Font Family	Use to set the font of the multiselect field label.	From the **Font Family** dropdown, select the required font of the multiselect field label.
Font Size	Use to set the font size of the multiselect field label.	From the **Font Size** dropdown, select the required font size of the multiselect field label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the multiselect field label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Color	Use to set the color of the multiselect field label.	Specify the multiselect field label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Field	Description	Value
Value		
Font Family	Use to set the font of the multiselect options.	From the **Font Family** dropdown, select the required font of the multiselect options.
Font Size	Use to set the font size of the multiselect options.	From the **Font Size** dropdown, select the required font size of the multiselect options. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the multiselect options.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Color	Use to set the color of the multiselect options.	Specify the multiselect options color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the multiselect field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the multiselect field visible on mobile devices.
On Tabs	Use to specify whether or not the multiselect field is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the multiselect field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required between the multiselect field and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required between the multiselect field and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required between the multiselect field and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required between the multiselect field and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Tooltip	Use to provide information about the multiselect field. This content appears when end users hover their mouse pointer over the field.	In the **Tooltip** text box, specify the required content. For example, for a *Password* field, specify the tooltip as *The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s), at least 1 non-alphanumeric character(s) such as *,-,or#*.
Control Description	Use to provide a description of the multiselect field.	In the **Control Description** text box, specify a brief description of the multiselect field.
ZoneList	Use to associate a zone with the multiselect field.	From the **ZoneList** dropdown, select the required zone. For procedural details on how to define a zone, refer to the Defining zone section.

Events

For information on configuring events with a multiselect field, refer to the Configuring events with form controls section.

Adding dropdown

Use the dropdown field to allow the end user to select a value as an input from the dropdown list. For example, selecting a country name.

To add a dropdown field to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Selection category, select **Dropdown** and drag and drop it on the design canvas. The dropdown field gets added to the canvas and the Quick Properties – DROPDOWN dialog appears.
   It displays the following dropdown field properties:
   - **Label** — Specify the dropdown field name.
   - **Add Icon** — Add an icon for the dropdown field that represents its content and purpose.
   - **Mapping** — Map the dropdown field to a data object field linked with the form or portal.
   - **User Defined ID** — Specify an ID that uniquely identifies the dropdown field in the system.
   - **Visible** — Turn on this toggle to display the dropdown field in the form or portal.
   - **Enable** — Turn on this toggle to enable the dropdown field in the form or portal.
   - **Mandatory** — Turn on this toggle to make it necessary for the field to be completed before the end user submits the form.
   - Click **View all** to view the complete list of dropdown properties. For detailed information on configuring dropdown properties, refer to the Configuring Dropdown field properties section.
4. Click **Done** to save changes made to the dropdown properties.
5. Save the form or portal.

Click the dropdown field to view the following options:

Option	Description
Move	Use to move the dropdown field to a different column within the same section.
Settings	Use to open the Properties tab of the dropdown field.
Copy	Use to create a copy of the dropdown field.
Delete	Use to delete the dropdown field.

Configuring Dropdown field properties

To access the properties tab for a Dropdown field (combo box), you can use one of the following options:

- In the Quick Properties - DROPDOWN dialog, click **View all**.
- Select the combo box on the canvas and then click the gear icon appearing on its boundary.
- Select the combo box on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Dropdown field:

Basic

Field	Description	Value
Label	Use to specify a name for the dropdown field.	In the **Label** text box, specify the name of the dropdown field. For example, *Country*.

Field	Description	Value
Upload Icon	Use to add an icon for the dropdown that represents its content and purpose.	To upload an icon for the dropdown, follow the below steps: 1. In the **Upload Icon** field, click the pin icon. 2. Select the required icon image from your local machine. 3. Click **Open**. The Add Icon field displays the name of the selected image file. You can click the cross icon to remove the added icon.
Mapping	Use to associate the dropdown field with a corresponding data object field. For example, map the *Country Name* field with the *Country* field in the data object."	To map the dropdown field with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the dropdown field, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.
Allow Searching	Use to include a search input field at the top of the dropdown list. When the end users click the dropdown, they can either scroll through the list or start typing in the search input field. The dropdown dynamically filters and displays only the items that match the entered text.	Turn on the **Allow Searching** toggle to include a search input field with the dropdown list.

Field	Description	Value
Allow Free Text in Dropdown	Use to allow the end users to either select an option from the predefined list or input their own text if the required option is not available in the list.	Turn on the **Allow Free Text in Dropdown** toggle to allow the end users to input their own text if the required option is not available in the list.

Behaviour

Field	Description	Value
Visible	Use to specify whether the dropdown field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the dropdown field is visible in the form.
Enable	Use to specify whether the dropdown field must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the dropdown field in the form.
Mandatory	Use to mark the dropdown field as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the dropdown field as mandatory and restrict the end user from leaving it empty. Upon enabling this toggle, the **Error message if not filled** text box appears, displaying the default error message. This message gets displayed if the end-user provides no or incorrect input in the field.

Options

You can define options for the dropdown field in the following ways:

- **Create Manually** — Use to manually define the options to be populated in the dropdown list.
  To manually set the dropdown list options, follow the below steps:
  1. Click **Create Manually**.
  2. In the **Option Label 1** field, specify the name of the first option.
  3. *(Optional)* In the **Option Value 1** field, assign a value to the defined label.
  4. Similarly, define other options for the multiselect field.
  5. Click **+ Add Option** to add more fields for defining the multiselect options.

6. From the **Default Option to be selected** dropdown, select the required option to set as the default selection.

- **Fetch from Database** — Use to retrieve the multiselect options from a database by executing a database query.
  To set up a query for fetching the dropdown list options, follow the below steps:
  1. Click **Fetch from Database**.
  2. In the **Database Query** field, specify the query for fetching the mutliselect options.
  3. Select the **Enable Caching** checkbox to allow temporary data storage.

From the **Default Sorting on Options** dropdown, select one of the following options:

- **Ascending** — This option arranges dropdown list options in alphabetically ascending order.
- **Descending** — This option arranges dropdown list options in alphabetically descending order.

Style

Field	Description	Value
Style Options	Use to select the dropdown field style.	Click the required style to select it. The default selection is *Style 1*.
Label-Option Alignment	Use to set the alignment of the dropdown label with respect to the options.	From the **Label-Option Alignment** dropdown, select one of the following options: • **Top-Down** — Aligns the label above its corresponding options. • **Left-Right** — Aligns the label to the left of its corresponding options.
Border Color	Use to specify the color of the dropdown border.	Specify the dropdown border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Background Color	Use to specify the color of the dropdown background.	Specify the dropdown background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.

Field	Description	Value
Border Width	Use to specify the width of the dropdown border.	From the **Border Width** dropdown, select the required dropdown border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the radius of the dropdown border.	From the **Border Radius** dropdown, select the required dropdown border-radius. It ranges from 0 to 15 px.
	Label	
Font Family	Use to set the font of the dropdown label.	From the **Font Family** dropdown, select the required font of the dropdown label.
Font Size	Use to set the font size of the dropdown label.	From the **Font Size** dropdown, select the required font size of the dropdown label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the dropdown label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Color	Use to set the color of the dropdown label.	Specify the dropdown label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
	Value	
Font Family	Use to set the font of the dropdown options.	From the **Font Family** dropdown, select the required font of the dropdown options.
Font Size	Use to set the font size of the dropdown options.	From the **Font Size** dropdown, select the required font size of the dropdown options. It ranges from 10 to 30 px.

Field	Description	Value
Font Weight	Use to set the font weight of the dropdown options.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Color	Use to set the color of the dropdown options.	Specify the dropdown options color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the dropdown field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the dropdown field visible on mobile devices.
On Tabs	Use to specify whether or not the dropdown field is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the dropdown field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required space between the dropdown field and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required space between the dropdown field and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required space between the dropdown field and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the dropdown field and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Tooltip	Use to provide information about the dropdown field. This content appears when end users hover their mouse pointer over the field.	In the **Tooltip** text box, specify the required content. For example, for a *Password* field, specify the tooltip as *The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s), at least 1 non-alphanumeric character(s) such as *,-,or#.*
Control Description	Use to provide a description of the dropdown field.	In the **Control Description** text box, specify a brief description of the dropdown field.
ZoneList	Use to associate a zone with the dropdown field.	From the **ZoneList** dropdown, select the required zone. For procedural details on how to define a zone, refer to the Defining zone section.

Events

For information on configuring events with a dropdown field, refer to the Configuring events with form controls section.

Adding Radio Button field

Use the radio button field to allow the end user to select only one option from a list of multiple options. For example, in the case of gender selection, either Male or Female option can be selected.

To add a radio button field to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Selection category, select **Radio Button** and drag and drop it on the design canvas. The radio button field gets added to the canvas and the Quick Properties – RADIOBOX dialog appears.
   It displays the following radio button field properties:
   - **Label** — Specify the radio button field name.
   - **Mapping** — Map the radio button field to a data object field linked with the form or portal.
   - **User Defined ID** — Specify an ID that uniquely identifies the radio button field in the system.
   - **Visible** — Turn on this toggle to display the radio button field in the form or portal.
   - **Enable** — Turn on this toggle to enable the radio button field in the form or portal.
   - **Mandatory** — Turn on this toggle to make it necessary for the field to be completed before the end user submits the form.
   - Click **View all** to view the complete list of radio button field properties. For detailed information on configuring radio button field properties, refer to the Configuring Radio Button field properties section.
4. Click **Done** to save changes made to the radio button field properties.
5. Save the form or portal.

Click the radio button field to view the following options:

Option	Description
Move	Use to move the radio button field to a different column within the same section.
Settings	Use to open the Properties tab of the radio button field.
Copy	Use to create a copy of the radio button field.
Delete	Use to delete the radio button field.

Configuring Radio Button field properties

To access the properties tab for a Radio Button field (radio box), you can use one of the following options:

- In the Quick Properties - RADIOBOX dialog, click **View all**.
- Select the radio box on the canvas and then click the gear icon appearing on its boundary.
- Select the radio box on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Radio Button field:

Basic

Field	Description	Value
Label	Use to specify a name for the radio button field.	In the **Label** text box, specify the name of the radio button field. For example, *Gender*.

Field	Description	Value
Mapping	Use to associate the radio button field with a corresponding data object field. For example, map the *Student Gender* field with the *Gender* field in the data object."	To map the radio button field with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the radio button field, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.

Behaviour

Field	Description	Value
Visible	Use to specify whether the radio button field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the radio button field is visible in the form.
Enable	Use to specify whether the radio button field must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the radio button field in the form.
Mandatory	Use to mark the radio button field as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the radio button field as mandatory and restrict the end user from leaving it empty. Upon enabling this toggle, the **Error message if not filled** text box appears, displaying the default error message. This message gets displayed if the end-user provides no or incorrect input in the field.

Options

Use to define the options to be populated in the radio button field.

To define the radio button field options, follow the below steps:

1. In the **Option Label 1** field, specify the name of the first option.
2. *(Optional)* In the **Option Value** field, assign a value to the defined label.
3. Similarly, define other options for the radio button field.
4. Click **+ Add Option** to add more fields for defining the radio button options.
5. From the **Default Option to be selected** dropdown, select the required option to set as the default selection.

Style

Field	Description	Value
Style Options	Use to select the radio button field style.	Click the required style to select it. The default selection is *Style 2*.
Label-Option Alignment	Use to set the alignment of the radio button field label with respect to the options.	From the **Label-Option Alignment** dropdown, select one of the following options: • **Top Down** — Aligns the label above its corresponding options. • **Left Right** — Aligns the label to the left of its corresponding options.
Options Display	Use to define the arrangement of radio button field options.	From the **Options Alignment** dropdown, select one of the following options: • **Horizontal** — Aligns the radio button field options side by side. • **Vertical** — Aligns the radio button field options one below the other.
Border Color	Use to specify the color of the radio button border.	Specify the radio button border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.

Field	Description	Value
Label		
Font Family	Use to set the font of the radio button field label.	From the **Font Family** dropdown, select the required font of the radio button field label.
Font Size	Use to set the font size of the radio button field label.	From the **Font Size** dropdown, select the required font size of the radio button field label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the radio button field label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Color	Use to set the color of the radio button field label.	Specify the radio button field label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Option Value		
Font Family	Use to set the font of the radio button options.	From the **Font Family** dropdown, select the required font of the radio button options.
Font Size	Use to set the font size of the radio button options.	From the **Font Size** dropdown, select the required font size of the radio button options. It ranges from 10 to 30 px.

Field	Description	Value
Font Weight	Use to set the font weight of the radio button options.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Color	Use to set the font color of the radio button options.	Specify the radio button options color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the radio button field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the radio button field visible on mobile devices.
On Tabs	Use to specify whether or not the radio button field is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the radio button field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required space between the radio button field and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Field	Description	Value
Spacing Right	Use to provide the required space between the radio button field and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required space between the radio button field and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required space between the radio button field and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Tooltip	Use to provide information about the radio button field. This content appears when end users hover their mouse pointer over the field.	In the **Tooltip** text box, specify the required content. For example, for a *Password* field, specify the tooltip as *The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s), at least 1 non-alphanumeric character(s) such as *,-,or#.*
Control Description	Use to provide a description of the radio button field.	In the **Control Description** text box, specify a brief description of the radio button field.
ZoneList	Use to associate a zone with the radio button field.	From the **ZoneList** dropdown, select the required zone. For procedural details on how to define a zone, refer to the Defining zone section.

Events

For information on configuring events with a radio button field, refer to the Configuring events with form controls section.

Adding Checkbox field

Use the checkbox field to allow the end user to select one or more options from a list of a fixed number of options. It is useful when you want to add a conditional field to your form. For example, a field asking Are you an Indian resident can have two options (checkboxes), Yes and No.

To add a checkbox field to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Selection category, select **Checkbox** and drag and drop it on the design canvas. The checkbox field gets added to the canvas and the Quick Properties – CHECKBOX dialog appears.
   It displays the following checkbox field properties:
   - **Label** — Specify the checkbox field name.
   - **Mapping** — Map the checkbox field to a data object field linked with the form or portal.
   - **User Defined ID** — Specify an ID that uniquely identifies the checkbox field in the system.
   - **Visible** — Turn on this toggle to display the checkbox field in the form or portal.
   - **Enable** — Turn on this toggle to enable the checkbox field in the form or portal.
   - **Mandatory** — Turn on this toggle to make it necessary for the field to be completed before the end user submits the form.
   - Click **View all** to view the complete list of checkbox field properties. For detailed information on configuring checkbox field properties, refer to the Configuring Checkbox field properties section.
4. Click **Done** to save changes made to the checkbox field properties.
5. Save the form or portal.

Click the checkbox field to view the following options:

Option	Description
Move	Use to move the checkbox field to a different column within the same section.
Settings	Use to open the Properties tab of the checkbox field.
Copy	Use to create a copy of the checkbox field.
Delete	Use to delete the checkbox field.

Configuring Checkbox field properties

To access the properties tab for a Checkbox field, you can use one of the following options:

- In the Quick Properties - CHECKBOX dialog, click **View all**.
- Select the checkbox field on the canvas and then click the gear icon appearing on its boundary.
- Select the checkbox field on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Checkbox field:

Basic

Field	Description	Value
Label	Use to specify a name for the checkbox.	In the **Label** text box, specify the name of the checkbox. For example, *Are you eligible to work in this country?*

Field	Description	Value
Mapping	Use to associate the checkbox field with a corresponding data object field.	To map the checkbox field with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the checkbox field, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.

Behaviour

Field	Description	Value
Visible	Use to specify whether the checkbox field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the checkbox field is visible in the form.
Enable	Use to specify whether the checkbox field must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the checkbox field in the form.
Mandatory	Use to mark the checkbox field as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the checkbox field as mandatory and restrict the end user from leaving it empty. Upon enabling this toggle, the **Error message if not filled** text box appears, displaying the default error message. This message gets displayed if the end-user provides no or incorrect input in the field.

Style

Field	Description	Value
Style Options	Use to select the checkbox style.	Click the required style to select it. The default selection is *Style 1*.
Active State Color	Use to select the color of checkbox in active state.	Specify the checkbox active state color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
	Label	
Font Family	Use to set the font of the checkbox label.	From the **Font Family** dropdown, select the required font of the checkbox label.
Font Size	Use to set the font size of the checkbox label.	From the **Font Size** dropdown, select the required font size of the checkbox label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the checkbox label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the color of the checkbox label.	Specify the checkbox label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the checkbox is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the checkbox visible on mobile devices.
On Tabs	Use to specify whether or not the checkbox is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the checkbox visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required space between the checkbox and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required space between the checkbox and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required space between the checkbox and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required space between the checkbox and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Tooltip	Use to provide information about the checkbox field. This content appears when end users hover their mouse pointer over the field.	In the **Tooltip** text box, specify the required content. For example, for a *Password* field, specify the tooltip as *The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s), at least 1 non-alphanumeric character(s) such as *,-,or#.*
Control Description	Use to provide a description of the checkbox field.	In the **Control Description** text box, specify a brief description of the checkbox field.
ZoneList	Use to associate a zone with the checkbox field.	From the **ZoneList** dropdown, select the required zone. For procedural details on how to define a zone, refer to the Defining zone section.

Events

For information on configuring events with a checkbox, refer to the Configuring events with form controls section.

Adding Toggle Switch field

A toggle is a type of digital switch that can be turned on and off. Use the toggle switch to allow the end user to enable or disable a condition, feature, or option. For example, turning on the Show Suggestion toggle displays the list of items a user can buy.

To add a toggle switch field to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.

3. In the Inputs category, select **Toggle Switch** and drag and drop it on the design canvas. The toggle switch field gets added to the canvas and the Quick Properties – TOGGLE dialog appears.
   It displays the following toggle switch field properties:
   - **Label** — Specify the toggle switch field name.
   - **Mapping** — Map the toggle switch field to a data object field linked with the form or portal.
   - **User Defined ID** — Specify an ID that uniquely identifies the toggle switch field in the system.
   - **Visible** — Turn on this toggle to display the toggle switch field in the form or portal.
   - **Enable** — Turn on this toggle to enable the toggle switch field in the form or portal.
   - **Mandatory** — Turn on this toggle to make it necessary for the field to be completed before the end user submits the form.
   - Click **View all** to view the complete list of toggle switch field properties. For detailed information on configuring toggle switch field properties, refer to the Configuring Toggle Switch field properties section.
4. Click **Done** to save changes made to the toggle switch field properties.
5. Save the form or portal.

Click the toggle switch field to view the following options:

Option	Description
Move	Use to move the toggle switch field to a different column within the same section.
Settings	Use to open the Properties tab of the toggle switch field.
Copy	Use to create a copy of the toggle switch field.
Delete	Use to delete the toggle switch field.

Configuring Toggle Switch field properties

To access the properties tab for a Toggle Switch, you can use one of the following options:

- In the Quick Properties - TOGGLE dialog, click **View all**.

- Select the toggle switch on the canvas and then click the gear icon appearing on its boundary.
- Select the toggle switch on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Toggle Switch:

Basic

Field	Description	Value
Label	Use to specify a name for the toggle switch.	In the **Label** text box, specify the name of the toggle switch.
Mapping	Use to associate the toggle switch field with a corresponding data object field.	To map the toggle switch field with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the toggle switch, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.

Field	Description	Value
Toggle States	Use to indicate the condition of the toggle switch, usually denoting whether it is active or inactive.	From the **Toggle States** dropdown, select one of the following options: • **Yes/No** — *No* signifies the inactive state, while *Yes* signifies the active state of the toggle switch. • **On/Off** — *Off* signifies the inactive state, while *On* signifies the active state of the toggle switch. • **Custom State** — This option allows you to define a customized state based on your requirements. In this case, specify the following: ◦ **State 1** — Specify the name of the inactive state. ◦ **State 2** — Specify the name of the inactive state.
Display Toggle State Beside Switch	Use to display the current state of the toggle switch next to the switch itself. This reduces the chances of ambiguity regarding the state of toggle.	Turn on the **Display Toggle State Beside Switch** to display the current state of the toggle switch next to the switch itself.

Behaviour

Field	Description	Value
Visible	Use to specify whether the toggle switch must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the toggle switch is visible in the form.
Enable	Use to specify whether the toggle switch must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the toggle switch in the form.

Field	Description	Value
Mandatory	Use to mark the toggle switch field as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the toggle switch field as mandatory and restrict the end user from leaving it empty. Upon enabling this toggle, the **Error message if not filled** text box appears, displaying the default error message. This message gets displayed if the end-user provides no or incorrect input in the field.

Style

Field	Description	Value
Style Options	Use to select the toggle switch style.	Click the required style to select it.
Toggle Alignment	Use to set the alignment of the toggle switch label with respect to the toggle switch.	From the **Toggle Alignment** dropdown, select one of the following options: • **Top-Down** — Aligns the label above its switch. • **Left-Right** — Aligns the label to the left of its switch.
Toggle Color	Use to set the color of the toggle color.	Specify the toggle color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
	Label	
Font Family	Use to set the font of the toggle switch label.	From the **Font Family** dropdown, select the required font of the toggle switch label.
Font Size	Use to set the font size of the toggle switch label.	From the **Font Size** dropdown, select the required font size of the toggle switch label. It ranges from 10 to 30 px.

Field	Description	Value
Font Weight	Use to set the font weight of the toggle switch label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Color	Use to set the color of the toggle switch label.	Specify the toggle switch label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the toggle switch field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the toggle switch field visible on mobile devices.
On Tabs	Use to specify whether or not the toggle switch field is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the toggle switch field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required space between the toggle switch and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Field	Description	Value
Spacing Right	Use to provide the required space between the toggle switch and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required space between the toggle switch and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required space between the toggle switch and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Tooltip	Use to provide information about the toggle switch field. This content appears when end users hover their mouse pointer over the field.	In the **Tooltip** text box, specify the required content. For example, for a *Password* field, specify the tooltip as *The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s), at least 1 non-alphanumeric character(s) such as *,-,or#.*
Control Description	Use to provide a description of the toggle switch field.	In the **Control Description** text box, specify a brief description of the toggle switch field.

Events

For information on configuring events with a toggle switch field, refer to the Configuring events with form controls section.

Adding Tile field

Use the tile field to allow the end user to select from options available as image tiles. For example, product selection.

To add a tile field to the form, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Selection category, select **Tile** and drag and drop it on the form canvas. The tile field gets added to the canvas and the Quick Properties – TILE dialog appears. It consists of the below fields:

   > When you drop the tile control on the canvas, three tiles get added by default. You can add or delete the tiles according to your requirement.

   - **Tile Contents** — Select the required content to display in the tile.
   - Toggle switches (Visible and Mandatory)
   - **Tile Selection Type** — Specify if the end-user can select one tile or multiple tiles.
   - **Cancel** — Closes the Quick Properties – TILE dialog without changing any properties.
   - **View all** — Invokes the properties section for the tile field. For more information, refer to the Configuring Tile field properties section.
   - **Done** — Save changes made to the tile field properties.
4. Click **Save** in the upper-right corner of the form builder page.

Click the tile field to view the following options:

Option	Description
Move	Use to move the tile field anywhere on the form canvas.
Settings	Use to open the settings or properties section of the tile field.
Copy	Use to create a copy of the tile field in the form.
Delete	Use to delete the tile field.

Configuring Tile field properties

To access the properties tab for a tile field, you can use one of the following options:

- In the Quick Properties - TILE dialog, click **View all**.
- Select the tile field on the canvas and then click the gear icon appearing on its boundary.
- Select the tile field on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Tile field:

Basic

Field	Description	Value
Tile Type	Use to define the arrangement of tiles in the column.	Select one the following options: • **Vertical** — To arrange the tiles side by side within the column. • **Horizontal** — To arrange the tiles one below another within the column.
Tile Content	Use to select the content elements you want to include within the tile.	You have the option to select from various content types, including Title, Image, Description, Points, Button, and Link. By default, all content elements are selected. To exclude specific content from the tile, clear the corresponding checkbox.
Add Tile	Use to add more tiles to the column.	Click **+ Add Tile** to add more tiles to the column.

To add content to a tile, follow the below steps:

1. Click the accordion icon against the required tile name.
2. In the **Title** field, specify the name of the tile.
3. In the **Image** field, click the pin icon .
    a. Select the required image file from your machine and click **Open**.
4. In the **Description** field, specify the description of the tile.

5. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears.
    a. Click the required data object field and then click **Map**.
    You can use the search box to search for the required data object field by name.
    b. Click **SAVE**.
6. In the **Points** field, specify the various points you want to add to the tile.
   Use the + Add Point option to add more points to the tile.
7. In the **Button Label** field, specify the name of the button.
8. In the **Link Label** field, specify the text to display as the link.
9. In the **Link URL** field, specify the **URL** of the resource to associate it with the link.

Behaviour

Field	Description	Value
Visible	Use to specify whether the tile field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the tile field is visible in the form.
Mandatory	Use to mark the tile field as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the tile field as mandatory and restrict the end user from leaving it empty.
Tile Selection Type	Use to specify whether you want the end user to select one tile at a time or multiple tiles.	In the **Tile Selection Type** field, select one of the following options: • **Single Select** — To allow the selection of one tile at a time. • **Multi Select** — To allow the selection of multiple tiles at a time.

Style

Field	Description	Value
Style Options	Use to select the tile style.	Click the required style to select it.

Field	Description	Value
Tile Background Color	Use to specify the background color of the tiles.	Specify the tiles background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Tile Border Color	Use to specify the border color of the tiles.	Specify the tiles border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Corner Radius	Use to specify the border radius of the tiles.	From the **Border Radius** dropdown, select the required tiles border radius. It ranges from 1 to 16 px.
Add Shadow to tiles	Use to give a shadow effect to tiles. It creates a sense of depth and dimension and enhances the overall look and feel of form.	Turn on the **Add Shadow to tiles** to give a shadow effect to tiles.
Image		
Image Fitting	Use to define how the image must fit in the tile.	In the **Image Fitting** field, select one of the following options: • **Default** — This option maintains the image's default fitting within the tile. • **Stretch to tile width** — This option enables the image to stretch and adjust according to width of the tile.
Title		
Font Family	Use to set the font of the tile title.	From the **Font Family** dropdown, select the required font of the tile title.
Font Size	Use to set the font size of the tile title.	From the **Font Size** dropdown, select the required font size of the tile title. It ranges from 10 to 30 px.

Field	Description	Value
Font Weight	Use to set the font weight of the tile title.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the color of the tile title.	Specify the tile title color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Description		
Font Family	Use to set the font of the tile description.	From the **Font Family** dropdown, select the required font of the tile description.
Font Size	Use to set the font size of the tile description.	From the **Font Size** dropdown, select the required font size of the tile description. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the tile description.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic

Field	Description	Value
Font Color	Use to set the font color of the tile description.	Specify the tile description color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Points		
Font Family	Use to set the font of the points added to the tile.	From the **Font Family** dropdown, select the required font of the points added to the tile.
Font Size	Use to set the font size of the points added to the tile.	From the **Font Size** dropdown, select the required font size of the points added to the tile. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the points added to the tile.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the font color of the points added to the tile.	Specify the font color of the points added to the tile using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Points Style	Use to select the point style for the unordered list added to the tile.	From the **Points Style** dropdown, select one of the following option: • Dots ● • Tick ✓ • Arrows »

Field	Description	Value
	Buttons	
Button Type	Use to select the required type of button added to the tile.	Select one of the following options: • **Primary Button** — Use for primary actions. It appears highlighted and signifies most important actions. • **Secondary Button** — Use for lesser important actions. • **Text Button** — Use to specify the function of the button in the form of text.
Font Family	Use to set the font of the button added to the tile.	From the **Font Family** dropdown, select the required font of the button added to the tile.
Font Size	Use to set the font size of the button added to the tile.	From the **Font Size** dropdown, select the required font size of the button added to the tile. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the button added to the tile.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the font color of the button added in the tile.	Specify the font color of the button added to the tile using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Corner Radius	Use to specify the radius of the button border.	From the **Corner Radius** dropdown, select the required button corner-radius. It ranges from 1 to 16 px.

Field	Description	Value
Link Text Color	Use to set the font color of the hyperlinked text added to the tile.	Specify the hyperlinked text color added to the tile using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the tile field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the tile field visible on mobile devices.
On Tabs	Use to specify whether or not the tile field is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the tile field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required space between the tile field and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required space between the tile field and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required space between the tile field and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required space between the tile field and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Control Description	Use to provide a description of the tile field.	In the **Control Description** text box, specify a brief description of the tile field.

Events

For information on configuring events with a tile field, refer to the Configuring events with form controls section.

Adding Picklist field

Use the picklist field to allow the end user to select a value from a pre-populated list. For example, a list of cities.

To add a picklist field to the form, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Selection category, select **Picklist** and then drag and drop it on the form canvas. The picklist field gets added to the canvas and the Quick Properties – PICKLIST dialog appears.
   It consists of the below fields:
   - **Label** — Specify the name of the field.
   - **Add Icon** — Allows adding an icon for the field.
   - **Mapping** — Allows mapping the picklist field to a data object field linked with the portal.
   - **User Defined ID** — Uniquely identifies the field in the system.
   - Toggle switches (Visible, Enable, and Mandatory)
   - **Cancel** — Closes the Quick Properties – PICKLIST dialog without changing any properties.
   - **View all** — Invokes the properties section for the picklist field. For more information, refer to the Configuring Picklist properties section.
   - **Done** — Save changes made to the picklist field properties.
4. Click **Save** in the upper-right corner of the form builder page.

Click the picklist field to view the following options:

Option	Description
Move	Use to move the picklist field anywhere on the form canvas.
Settings	Use to open the settings or properties section of the picklist field.
Copy	Use to create a copy of the picklist field in the form.
Delete	Use to delete the picklist field.

Configuring Picklist field properties

To access the properties tab for a Picklist, you can use one of the following options:

- In the Quick Properties - PICKLIST dialog, click **View all**.
- Select the picklist on the canvas and then click the gear icon appearing on its boundary.
- Select the picklist on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Picklist:

Basic

Field	Description	Value
Label	Use to specify a name for the picklist field.	In the **Label** text box, specify the name of the picklist field. For example, *Country Name*.

Field	Description	Value
Upload Icon	Use to add an icon for the picklist that represents its content and purpose.	To upload an icon for the picklist field, follow the below steps: 1. In the **Upload Icon** field, click the pin icon . 2. Select the required icon image from your local machine. 3. Click **Open**. The Upload Icon field displays the name of the selected image file. You can click the cross icon to remove the added icon.
Mapping	Use to associate the picklist field with a corresponding data object field. For example, map the *Student Name* field with the *Name* field in the data object."	To map the picklist field with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the picklist field, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.
Popup Text	Use to specify a popup text for the picklist field that describes its content and purpose.	In the **Popup Text** field, specify the required text.

Field	Description	Value
Associate Picklist Data Object	Click the **View Data Objects** ••• icon to associate a picklist data object with the Picklist control.	In the Data Object Picklist Integration dialog that appears, you can perform the following operations: • Creating a dynamic picklist data object from scratch • Importing picklist data object • Selecting an existing picklist data object from the dropdown list Once you select a picklist data object, you can then further map the output variables with the picklist variables and apply filter conditions on the picklist variables. For more information, see Defining dynamic picklist data objects.
Query	Use to retrieve the picklist options by executing a database query.	In the **Query** field, specify the query for fetching the picklist options.
Batch Size	Use to define the number of picklist options displayed at a time.	In the **Batch Size** field, specify the number of picklist options to display at a time.
Enable Caching	Use to enable saving of the picklist data temporarily.	Turn on the **Enable Caching** toggle to enable the saving of the picklist data temporarily.
Allow Multiple Selection	Use to allow the selection of multiple options within a picklist.	Turn on the **Allow Multiple Selection** toggle to allow the selection of multiple options within a picklist.

Behaviour

Field	Description	Value
Visible	Use to specify whether the picklist field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the picklist field is visible in the form.
Enable	Use to specify whether the picklist field must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the picklist field in the form.

Field	Description	Value
Mandatory	Use to mark the picklist field as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the picklist field as mandatory and restrict the end user from leaving it empty. Upon enabling this toggle, the **Error message if not filled** text box appears, displaying the default error message. This message gets displayed if the end-user provides no or incorrect input in the field.

Style

Field	Description	Value
Style Options	Use to select the picklist field style.	Click the required style to select it. The default selection is *Style 1*.
Label-Value Alignment	Use to set the alignment of the picklist label with respect to the value.	From the **Label-Value Alignment** dropdown, select one of the following options: • **Top-Down** — Aligns the label above its corresponding value. • **Left-Right** — Aligns the label to the left of its corresponding value.
Border Color	Use to specify the color of the picklist border.	Specify the picklist border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Background Color	Use to specify the color of the picklist background.	Specify the picklist background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Width	Use to specify the width of the picklist border.	From the **Border Width** dropdown, select the required picklist border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the radius of the picklist border.	From the **Border Radius** dropdown, select the required picklist border-radius. It ranges from 0 to 15 px.

Field	Description	Value
		Label
Font Family	Use to set the font of the picklist field label.	From the **Font Family** dropdown, select the required font of the picklist field label.
Font Size	Use to set the font size of the picklist field label.	From the **Font Size** dropdown, select the required font size of the picklist field label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the picklist field label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Color	Use to set the color of the picklist field label.	Specify the picklist field label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Field	Description	Value
	Value	
Font Family	Use to set the font of the value selected in the picklist field.	From the **Font Family** dropdown, select the required font of the picklist field value.
Font Size	Use to set the font size of the value selected in the picklist field.	From the **Font Size** dropdown, select the required font size of the picklist field value. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the value selected in the picklist field.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the color of the value selected in the picklist field.	Specify the picklist field value color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the picklist field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the picklist field visible on mobile devices.
On Tabs	Use to specify whether or not the picklist field is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the picklist field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required space between the picklist field and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required space between the picklist field and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required space between the picklist field and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required space between the picklist field and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Tooltip	Use to provide information about the picklist. This content appears when end users hover their mouse pointer over the field.	In the **Tooltip** text box, specify the required content. For example, for a *Password* field, specify the tooltip as *The password must have at least 8 characters, at least 1 digit(s), at least 1 lower case letter(s), at least 1 upper case letter(s), at least 1 non-alphanumeric character(s) such as *,-,or#.*
Control Description	Use to provide a description of the picklist.	In the **Control Description** text box, specify a brief description of the picklist.
ZoneList	Use to associate a zone with the picklist.	From the **ZoneList** dropdown, select the required zone. For procedural details on how to define a zone, refer to the Defining zone section.

Events

For information on configuring events with a picklist, refer to the Configuring events with form controls section.

Related topic(s)

Defining dynamic picklist data objects

Adding Button field

A button allows you to add interactive elements to your form or portal that allow end users to trigger actions when they click on them. Buttons are commonly used in web forms to submit the form data to a server and reset the form.

To add a button to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Actions category, select **Button** and drag and drop it on the design canvas. The button gets added to the canvas and the Quick Properties – BUTTON dialog appears.
   It displays the following button properties:
   - **Label** — Specify the button name.
   - **Add Icon** — Add an icon for the button that represents its content and purpose.
   - **User Defined ID** — Specify an ID that uniquely identifies the button in the system.
   - **Visible** — Turn on this toggle to display the button in the form or portal.
   - **Enable** — Turn on this toggle to enable the button in the form or portal.
   - Click **View all** to view the complete list of button properties. For detailed information on configuring button properties, refer to the Configuring Button properties section.
4. Click **Done** to save changes made to the button properties.
5. Save the form or portal.

Click the button area to view the following options:

Option	Description
Move	Use to move the button to a different column within the same section.
Settings	Use to open the Properties tab of the button.
Copy	Use to create a copy of the button.
Delete	Use to delete the button.

Configuring Button field properties

To access the properties tab for a Button, you can use one of the following options:

- In the Quick Properties - BUTTON dialog, click **View all**.
- Select the button field on the canvas and then click the gear icon appearing on its boundary.
- Select the button field on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Button:

Basic

Field	Description	Value
Label	Use to specify the name of the button.	In the **Label** text box, specify the name of the button. For example, *Submit*.
Button Type	Use to select the required type of button.	Select one of the following options: • **Primary Button** — Use for primary actions. It appears highlighted and signifies most important actions. • **Secondary Button** — Use for lesser important actions. • **Text Button** — Use to specify the function of the button in the form of text.
Button Icon	Use to add an icon for the button that represents its content and purpose.	To add an icon for the button, follow the below steps: 1. In the **Button Icon** field, click the pin icon . 2. Select the required icon image from your local machine. 3. Click **Open**. The Add Icon field displays the name of the selected image file. You can click the cross icon to remove the added icon.
Icon Alignment	Use to define the alignment of the button icon with respect to its label.	From the **Icon Alignment** dropdown, select one of the following options: • **Left** — Places the icon on the left of the button label. • **Right** — Places the icon on the right of the button label.

Field	Description	Value
Horizontal Alignment	Use to define the horizontal alignment of the button in the column.	From the **Horizontal Alignment** dropdown, select one of the following options: • **Center** — Places the button in the center of the column horizontally. • **Left** — Places the button to the left of the column. • **Right** — Places the button to the right of the column.
Vertical Alignment	Use to define the vertical alignment of the button in the column.	From the **Vertical Alignment** dropdown, select one of the following options: • **Center** — Places the button in the center of the column vertically. • **Top** — Places the button at the top of the column. • **Down** — Places the button in the bottom of the column.
Stretch to Column's Width	Use to allow the button to stretch and adjust according to the column's width.	Turn on the **Stretch to Column's Width** toggle to allow the button to stretch to the column's width.
User Defined ID	Use to allocate a distinctive ID to the button, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.

Button Behaviour

Field	Description	Value
Visible	Use to specify whether the button must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the button is visible in the form.
Enable	Use to specify whether the button must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the button in the form.

Button Events

Use to specify the event triggered when the end user clicks the button. In the **On Click** field, select one of the following options:

- **Subform** — This option enables the launch of a subform upon the button click.

- Select one of the following options:
    - **Create** — Click to design a new subform and associate it with the button. The subform design canvas appears, allowing you to design the subform as required. For more information on this, refer to the Creating subforms section. After designing, click **Save Changes** to save the subform definition. Alternatively, click **Save & Close** to save the changes and close the subform canvas.
      Use the **Download** option to save the subform definition as a ZIP file to your machine.
    - **Upload** — Click to upload a subform from your local machine. Select the required ZIP file from your machine and click **Open**. The subform gets uploaded.
- **Link** — This option enables the opening of a resource upon the button click.
    - In the **Link** field, enter the URL of the required resource.

Button Style

Field	Description	Value
Font Size	Use to set the font size of the button label.	From the **Font Size** dropdown, select the required font size of the button label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the button label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Family	Use to set the font of the button label.	From the **Font Family** dropdown, select the required font of the button label.

Field	Description	Value
Background Color	Use to specify the color of the button background.	Specify the button background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Font Color	Use to set the color of the button label.	Specify the button label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Corner Radius	Use to specify the radius of the button border.	From the **Corner Radius** dropdown, select the required button corner-radius. It ranges from 1 to 16 px.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the button is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the button visible on mobile devices.
On Tabs	Use to specify whether or not the button is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the button visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the button and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the button and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the button and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the button and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Control Description	Use to provide a description of the button field.	In the **Control Description** text box, specify a brief description of the button field.

Events

For information on configuring events with a button, refer to the Configuring events with form controls section.

Configuring a new business function

You can configure a business function as a REST API to serve a specific business purpose. This business function can be reused in multiple portals or forms to perform a similar operation.

> You can configure business functions only for the Button control.

For example, a reusable credit bureau function can be employed across multiple portals to efficiently assess creditworthiness. For instance, it can facilitate loan approvals, credit card applications, and even rental property evaluations by providing a centralized, consistent credit history analysis, streamlining the decision-making process, and enhancing risk assessment accuracy. This versatility in serving various purposes not only saves development time but also ensures a standardized and reliable credit evaluation system.

To configure a new business function for button control, follow the below steps:

1. Click the required button control and select the **Settings** icon or **Properties** icon from the upper-right corner of the page. The button properties pane appears.
2. Expand **Business Function**.
3. Click the add icon . The Business Function dialog appears.
4. In the **Function Name** field, specify the business function name.
5. In the **REST Endpoint URL** field, specify the source code URL of the business function.
6. In the Define Parameters section, under the **Input Parameters** tab, select the required input parameters. These parameters are the portal data objects.
7. Click the **Output Parameters** tab and select the required output parameters. These parameters are the portal data objects.
8. Click any of the following buttons:
   - **Save** — To save the configuration.
     After saving, the business function appears in the Add Business Function list, where you can edit or delete it before deploying.
     - To edit, hover over the saved business function and then click the **Edit Business Function** icon . The Business Function dialog appears. Make the required changes and then deploy it.

    - To delete, hover over the saved business function and then click the **Delete Business Function** icon . The Delete Confirmation dialog appears. Click **Delete** to continue.
- **Deploy** — To deploy the configured business function.
  On deploying, the configured business function appears in the Available Business Function list.

Related topic(s)

- Defining data objects
- Associating or disassociating a business function
- Duplicating a business function
- Downloading a business function

Associating or disassociating a business function

You can associate a configured business function with a button control to enable its functionality.

To associate a business function, follow the below steps:

1. In the Business Function section of the button control, navigate to the Available Business Function list.
2. Hover over the required business function and click the **Link Business Function** icon . The Business Function dialog appears.

   > Ensure the input and output parameters of a business function are available in the data objects of a form or portal. Otherwise, you can not reuse any business function and a failed data object mapping error appears.

3. Click **Link**. The business function is associated with the selected button control and the Linked Business Function icon appears.

To disassociate a business function, perform the below steps:

1. Hover over an associated business function and click the **De-Link Business Function** icon The Business Function dialog appears.
2. Click **De-Link**. The business function gets disassociated.

Duplicating a business function

In case you want to use an associated business function with a few modifications, you can duplicate that business function and modify it according to your requirements.

To duplicate a business function, perform the below steps:

1. In the Business Function section of a button control, navigate to the Available Business Function list.
2. Hover over the required business function and click the **Duplicate Business Function** icon . The business function gets duplicated and appears in the Add Business Function list.

Downloading a business function

After configuring a business function, a project folder is created in your application server. The project folder contains default input, output, status, and other project files. You can download the project folder, make necessary changes based on your business requirements, and then deploy the project folder back to the application server for reuse.

To download a business function, follow the below steps:

1. In the Business Function section of a button control, navigate to the Available Business Function list.
2. Hover over the required business function and click the **Download Business Function** icon . The business function gets downloaded to your local system in the *.zip* format.
   To modify and deploy the business functions, see the *Modifying and reusing business functions* section in the *NewgenONE Developer Guide*.

Adding Links

Use the link to add an external resource to your form such as a website, feedback form, and more.

To add a link to the form or portal, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Actions category, select **Link** and drag and drop it on the design canvas. The link gets added to the canvas and the Quick Properties – LINK dialog appears. It displays the following link properties:
   - **Label** — Specify the link name.
   - **User Defined ID** — Specify an ID that uniquely identifies the link in the system.
   - **Mapping** — Map the link field to a data object field, linked with the form or portal.
   - **Link Alignment** — Specify the horizontal alignment of the link in the column. The available options are Left, Center, and Right.
   - **Visible** — Turn on this toggle to display the link in the form or portal.
   - **Enable** — Turn on this toggle to enable the link in the form or portal.
   - Click **View all** to view the complete list of link properties. For detailed information on configuring link properties, refer to the Configuring Link properties section.
4. Click **Done** to save changes made to the link properties.
5. Save the form or portal.

Click the link area to view the following options:

Option	Description
Move	Use to move the link to a different column within the same section.
Settings	Use to open the Properties tab of the link.
Copy	Use to create a copy of the link.
Delete	Use to delete the link.

Configuring Link properties

To access the properties tab for a Link, you can use one of the following options:

- In the Quick Properties - LINK dialog, click **View all**.
- Select the link on the canvas and then click the gear icon appearing on its boundary.
- Select the link on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Link:

Basic

Field	Description	Value
Label	Use to specify the text to display as the link.	In the **Label** text box, specify the text to display as the link.

Field	Description	Value
Mapping	Use to associate the link with a corresponding data object field.	To map the link with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the link, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.
Link Alignment	Use to define the alignment of link in the column.	From the **Link Alignment** dropdown, select one of the following options: • **Left** — Places the link to the left of the column. • **Center** — Places the link in the center of the column horizontally. • **Right** — Places the button to the link of the column.
On Click	Use to define what triggers on clicking the link.	In the **On Click** field, select one of the following options: • **Code** — Specify the required **Method Name** of the function to associate with the link. • **URL** — Specify the **URL** of the resource to associate it with the link.

Link Behaviour

Field	Description	Value
Visible	Use to specify whether the link must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the link is visible in the form.

Field	Description	Value
Enable	Use to specify whether the link must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the link in the form.

Style

Field	Description	Value
Font Family	Use to set the font of the hyperlinked text.	From the **Font Family** dropdown, select the required font for the hyperlinked text.
Font Size	Use to set the font size of the hyperlinked text.	From the **Font Size** dropdown, select the required font size of the hyperlinked text. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the hyperlinked text.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Regular • Bold • Regular Italic
Font Color	Use to set the font color of the hyperlinked text.	Specify the hyperlinked text color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Background Color	Use to specify the link of the background color.	Specify the link background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the link is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the link visible on mobile devices.

Field	Description	Value
On Tabs	Use to specify whether or not the link is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the link visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the link and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the link and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the link and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the link and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Adding Label

Labels are used to associate text descriptions with form elements (such as input fields, checkboxes, and radio buttons) to make the form more accessible and user-friendly.

To add a label to the form or portal, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Display Text category, select **Label** and drag and drop it on the design canvas. The label gets added to the canvas and the Quick Properties – LABEL dialog appears.
   It displays the following label properties:
   - **Label** — Specify the label name.
   - **Mapping** — Map the label to a data object field, linked with the form or portal.
   - **User Defined ID** — Specify an ID that uniquely identifies the label in the system.
   - **Visible** — Turn on this toggle to display the label in the form or portal.
   - **Text Alignment** — Specify the horizontal alignment of the label in the column. The available options are Left, Center, and Right.
   - Click **View all** to view the complete list of label properties. For detailed information on configuring label properties, refer to the Configuring Label properties section.
4. Click **Done** to save changes made to the label properties.
5. Save the form or portal.

Click the label area to view the following options:

Option	Description
Move	Use to move the label to a different column within the same section.
Settings	Use to open the Properties tab of the label.
Copy	Use to create a copy of the label.
Delete	Use to delete the label.

Configuring Label properties

To access the properties tab for a Label, you can use one of the following options:

- In the Quick Properties - LABEL dialog, click **View all**.
- Select the label on the canvas and then click the gear icon appearing on its boundary.
- Select the label on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Label:

Basic

Field	Description	Value
Label	Use to specify a name of the label.	In the **Label** text box, specify the name of the label.
Mapping	Use to associate the label with a corresponding data object field. For example, map the *Student Name* field with the *Name* field in the data object."	To map the label with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the label, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.

Field	Description	Value
Visible	Use to specify whether the label must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the label is visible in the form.
Text Alignment	Use to define the horizontal alignment of the label in the column.	From the **Horizontal Alignment** dropdown, select one of the following options: • **Center** — Places the label in the center of the column. • **Left** — Places the label to the left of the column. • **Right** — Places the label to the right of the column.

Style

Field	Description	Value
Font Family	Use to set the font of the label.	From the **Font Family** dropdown, select the required font of the label.
Font Size	Use to set the font size of the label.	From the **Font Size** dropdown, select the required font size of the label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the font color of the label.	Specify the label font color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Field	Description	Value
Background Color	Use to specify the color of the label background.	Specify the label background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the label is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the label visible on mobile devices.
On Tabs	Use to specify whether or not the label is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the label visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the label and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the label and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the label and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the label and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Adding Paragraph

In forms, paragraphs are typically used to group related pieces of information or instructions together. Paragraphs can provide context, instructions, or explanations about the fields or sections in the form or portal.

To add a paragraph to the form or portal, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Display Text category, select **Paragraph** and drag and drop it on the design canvas. The paragraph gets added to the canvas and the Quick Properties – PARAGRAPH dialog appears.
   It displays the following paragraph properties:
   - **User Defined ID** — Specify an ID that uniquely identifies the paragraph in the system.
   - **Visible** — Turn on this toggle to display the paragraph in the form or portal.
   - Click **View all** to view the complete list of paragraph properties. For detailed information on configuring paragraph properties, refer to the Configuring Paragraph properties section.
4. Click **Done** to save changes made to the paragraph properties.
5. Save the form or portal.

Click the paragraph area to view the following options:

Option	Description
Move	Use to move the paragraph to a different column within the same section.
Settings	Use to open the Properties tab of the paragraph.
Copy	Use to create a copy of the paragraph.
Delete	Use to delete the paragraph.

Configuring Paragraph properties

To access the properties tab for a Paragraph, you can use one of the following options:

- In the Quick Properties - PARAGRAPH dialog, click **View all**.
- Select the paragraph on the canvas and then click the gear icon appearing on its boundary.
- Select the paragraph on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Paragraph:

Basic

Field	Description	Value
User Defined ID	Use to allocate a distinctive ID to the paragraph field, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.
Visible	Use to specify whether the paragraph must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the paragraph is visible in the form.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the paragraph is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the paragraph visible on mobile devices.
On Tabs	Use to specify whether or not the paragraph is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the paragraph visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the paragraph and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the paragraph and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the paragraph and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the paragraph and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

For information on configuring the paragraph text style, refer to the Formatting text section.

Adding Table

A table field allows you to organize and present data in a structured format. Tables are commonly used in forms or portals to capture and display tabular data, such as lists, records, or survey responses. They help end users input or view data more efficiently. For example, while designing a *Customer Feedback Form* for a restaurant regarding their dining experience, create a table to categorize the feedback into different aspects of the dining experience. This can include categories such as *Food*, *Service*, *Ambiance*, and *Suggestions*.

To add a table to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Grid category, select **Table** and drag and drop it on the design canvas. The table gets added to the canvas and the Quick Properties – TABLE dialog appears. It displays the following table properties:
   - **Mapping** — Map the table to a data object field, linked with the form or portal.
   - **Add Columns** — Use this option to add columns to the table. For more information, refer to the Configuring Table properties section.
   - **Visible** — Turn on this toggle to display the table in the form or portal.
   - **Enable** — Turn on this toggle to enable the table in the form or portal.
   - Click **View all** to view the complete list of table properties. For detailed information on configuring table properties, refer to the Configuring Table properties section.
4. Click **Done** to save changes made to the table properties.
5. Save the form or portal.

Click the table area to view the following options:

Option	Description
Move	Use to move the table to a different column within the same section.
Settings	Use to open the Properties tab of the table.
Copy	Use to create a copy of the table.

Option	Description
Delete	Use to delete the table.
Upload table	Click the ellipsis icon and select the **Upload Table** option to upload a table definition in JSON format from your computer.

Additional options:

- Download — Click to download the table definition in JSON format to your computer.
- Delete — Click to delete the inserted table.

Configuring Table properties

To access the properties tab for a Table, you can use one of the following options:

- In the Quick Properties - TABLE dialog, click **View all**.
- Select the table on the canvas and then click the gear icon appearing on its boundary.
- Select the table on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Table:

Basic

Field	Description	Value
Label	Use to specify a name for the table.	In the **Label** text box, specify the name of the table.

Field	Description	Value
Mapping	Use to associate the table with a corresponding data object field.	To map the table with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the table, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.

Columns

By default, a single column is added to the table. To add additional columns to the table, click the **+ Add Column(s)** option. Alternatively, to configure the properties of an existing column, click the edit icon next to the required column name. The Add Column(s) dialog appears.

To configure column properties, follow the below steps:

1. In the **Column Name** field, specify the name of the table column.
2. From the **Associated Field** dropdown, select the data object field to associate with the column.
3. From the **Column Type** dropdown, select the required type of field. For example, text box, text area, and more.
4. In the **Column Tooltip** field, specify information about the column. This content appears when end users hover their mouse pointer over it.
5. From the **Column Width** dropdown, select the required unit to define the width of the column, Percentage, or Pixels, and then specify the width in the provided text box.
6. From the **Masking Pattern** dropdown, select the format or pattern for the end user to input in the column. This field is applicable for a text box type column only.

7. Turn on the **Sorting Type** toggle to allow the end user to switch between different methods or criteria for sorting a list of items within the table column.

> Additional checkboxes and properties appear depending on the type of column you select. To learn how to configure these properties, refer to the relevant configure properties section. For example, if you're working with a text box column type, refer to the *Configuring Text Box Properties* section.

8. Click Add **Column and Continue** to save the configured properties and continue with the addition of another column.

Table Layout

Click the required option to select the table layout. The available options are Box, Striped, and Lined.

Style

Field	Description	Value
Table Title		
Font Family	Use to set the font of the table title.	From the **Font Family** dropdown, select the required font of the table title.
Font Weight	Use to set the font weight of the table title.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Size	Use to set the font size of the table title.	From the **Font Size** dropdown, select the required font size of the table title. It ranges from 10 to 30 px.
Font Color	Use to set the color of the table title.	Specify the table title color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Field	Description	Value
Table Column		
Height	Use to specify the height of the table column.	From the **Height** dropdown, select one of the following options: • Compact • Large
Font Family	Use to set the font of the text entered in table column.	From the **Font Family** dropdown, select the required font of the text entered in table column.
Font Style	Use to set the font style of the text entered in table column.	From the **Font Style** dropdown, select the required style. The available options are: • Normal • Bold Italic • Bold • Italic
Font Size	Use to set the font size of the text entered in table column.	From the **Font Size** dropdown, select the required font size of the of the text entered in table column. It ranges from 10 to 30 px.
Text Alignment	Use to set the horizontal alignment of the value entered in the table column.	From the **Text Alignment** dropdown, select one of the following options: • **Left** — Places the value to the left of the column. • **Center** — Places the value in the center of the column. • **Right** — Places the value to the right of the column.
Background Color	Use to specify the color of the table column background.	Specify the table column background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Font Color	Use to set the color of the text entered in table column.	Specify the column text color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Field	Description	Value
Table Rows		
Height	Use to specify the height of the table rows.	From the **Height** dropdown, select one of the following options: • Compact • Large
Table Height	Use to define the overall table height.	In the **Table Height** field, specify the required height in pixels.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the table is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the table visible on mobile devices.
On Tabs	Use to specify whether or not the table is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the table visible on tablet devices.

Advance Properties

Field	Description	Value
Enable	Use to specify whether the table must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the table in the form.
Visible	Use to specify whether the table must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the table is visible in the form.
Search Bar	Use to add or remove the search bar from the table.	Turn on the **Search Bar** toggle to add the search bar field to the table.
Hide Add Option	Use to hide or display the add record option in the table.	Turn on the **Hide Add Option** toggle to hide the add record option in the table.

Field	Description	Value
Hide Delete Option	Use to hide or display the delete option with the table.	Turn on the **Hide Delete Option** toggle to hide the delete record option from the table.
Allow Download	Use to allow table download in JSON format.	Turn on the **Allow Download** toggle to allow table download.
Show checkboxes in disabled table	Use to specify whether or not the checkboxes appear in the disabled state.	Turn on the **Show checkboxes in disabled table** toggle to display checkboxes in table disable state.
MultiSelect	Use to enable multiselect in the table.	Turn on the **MultiSelect** toggle to display checkboxes in the table disable state.
Enable Time Zone	Use to enbale time zone in the table.	Turn on the **Enable Time Zone** toggle to enable time zone in the table.
Show Total	Use to display the total of all the columns.	Turn on the **Show Total** toggle to display the total of all columns.
Show Serial Number	Use to add the serial number column to the table.	Turn on the **Show Serial Number** toggle to add the S. No. column to the table.
Control Description	Use to provide a description of the table.	In the **Control Description** text box, specify a brief description of the table.

Field	Description	Value
Table Scroll	Use to enable scrolling for the listview after it reaches a certain height or a specific number of rows.	Select one of the following option: • **Default (Scroll after 4 rows)**: Select this option to enable scroll for the table after its 4 rows. By default this option is enabled. • **Custom (Set max no. of rows)**: Select this option to customize the number of rows after which scrolling is enabled. Enter the desired number of rows in the No. of Rows field to enable scrolling after the specified number of rows. • **Custom (Table height in pixel)**: Select this option to customize the table's scroll behavior based on its height in pixels. Enter the desired pixel height in the Table Height field to enable scrolling after the specified height of the table.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the table and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the table and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the table and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the table and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Uploading Excel file in a table or grid view

The table or grid tab allows you to upload Excel files to populate the table fields and download the table in Excel format.

This property is available only at runtime.

To upload a Excel file, perform the following steps:

1. Open the required workitem, in the workdesk.
2. In the table or grid tab, select **More Options**.
3. Select one of the following options:
   - **Upload Excel**: Select to upload the CSV or excel file to populate the table fields.
   - **Download:** Select to download the table in CSV or excel file format.

Adding List View

A list view allows the display of a list of items or records, typically in a tabular format. For example, in a *Contact Management* application, the list view within the user's contact form serves as a tabular display of their contacts. Each row represents a contact with columns for attributes such as name, email, phone number, and address. Users can easily scroll through their contacts, sort them by name or other criteria, and apply filters to view specific subsets.

To add a list view to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Grid category, select **List View** and drag and drop it on the design canvas. The list view gets added to the canvas and the Quick Properties – LISTVIEW dialog appears.
   It displays the following list view properties:
   - **Mapping** — Map the list view to a data object field, linked with the form or portal.
   - **Add Columns** — Use this option to add columns to the list view. For more information, refer to the Configuring List View properties section.
   - **Visible** — Turn on this toggle to display the list view in the form or portal.
   - **Enable** — Turn on this toggle to enable the list view in the form or portal.
   - Click **View all** to view the complete list of table properties. For detailed information on configuring table properties, refer to the Configuring List View properties section.
4. Click **Done** to save changes made to the list view properties.
5. Save the form or portal.

Click the list view area to view the following options:

Option	Description
Move	Use to move the list view to a different column within the same section.
Settings	Use to open the Properties tab of the list view.
Copy	Use to create a copy of the list view.
Delete	Use to delete the list view.

Option	Description
Upload list view	Click the ellipsis icon and select the **Upload ListView** option to upload a list view definition in JSON format from your computer.

Additional options:

- Download — Click to download the list view definition in JSON format to your computer.
- Delete — Click to delete the inserted list view.

Configuring List View properties

To access the properties tab for a List View, you can use one of the following options:

- In the Quick Properties - LISTVIEW dialog, click **View all**.
- Select the list view on the canvas and then click the gear icon appearing on its boundary.
- Select the list view on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a List View:

Basic

Field	Description	Value
Label	Use to specify the name of the list view.	In the **Label** text box, specify the name of the list view.

Field	Description	Value
Mapping	Use to associate the list view with a corresponding data object field.	To map the list view with a data object field, follow the below steps: 1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears. 2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name. 3. Click **SAVE**. Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.
User Defined ID	Use to allocate a distinctive ID to the list view, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.

Columns

By default, a single column is added to the list view. To add additional columns to the list view, click the **+ Add Column(s)** option. Alternatively, to configure the properties of an existing column, click the edit icon next to the required column name. The Add Column(s) dialog appears.

To configure column properties, follow the below steps:

1. In the **Column Name** field, specify the name of the list view column.
2. From the **Associated Field** dropdown, select the data object field to associate with the column.
3. From the **Column Type** dropdown, select the required type of field. For example, text box, text area, and more.
4. In the **Column Tooltip** field, specify information about the column. This content appears when end users hover their mouse pointer over it.
5. From the **Column Width** dropdown, select the required unit to define the width of the column, Percentage, or Pixels, and then specify the width in the provided text box.
6. From the **Masking Pattern** dropdown, select the format or pattern for the end user to input in the column. This field is applicable for a text box type column only.

7. Turn on the **Sorting Type** toggle to allow the end user to switch between different methods or criteria for sorting a list of items within the list view column.

> Additional checkboxes and properties appear depending on the type of column you select. To learn how to configure these properties, refer to the relevant configure properties section. For example, if you're working with a text box column type, refer to the *Configuring Text Box Properties* section.

8. Click Add **Column and Continue** to save the configured properties and continue with the addition of another column.

Listview Layout

Click the required option to select the listview layout. The available options are Box, Striped, and Lined.

Data Addition

Use to specify how end users can input data into a list view within a form or portal. Select one of the following options:

- **Through Popup** — The portal or form displays a separate popup when users want to add or edit data in the list view. Typically, this popup contains input fields where end users can enter the relevant information for a new record or make changes to an existing one. This is preferable if the list view contains ten or more than ten columns.
- **Section above Listview** — The portal or form displays the input fields just above the list of records. The end users can input data or make edits to records in the same view where they can see the existing data.

Style

Field	Description	Value
Listview Title		
Font Family	Use to set the font of the listview title.	From the **Font Family** dropdown, select the required font of the listview title.

Field	Description	Value
Font Weight	Use to set the font weight of the listview title.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Normal • Italic • Bold • Bold Italic
Font Size	Use to set the font size of the listview title.	From the **Font Size** dropdown, select the required font size of the listview title. It ranges from 10 to 30 px.
Font Color	Use to set the color of the listview title.	Specify the listview title color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Listview Column		
Height	Use to specify the height of the listview column.	From the **Height** dropdown, select one of the following options: • Compact • Large
Font Family	Use to set the font of the text entered in listview column.	From the **Font Family** dropdown, select the required font of the text entered in listview column.
Font Style	Use to set the font style of the text entered in listview column.	From the **Font Style** dropdown, select the required style. The available options are: • Normal • Bold Italic • Bold • Italic
Font Size	Use to set the font size of the text entered in listview column.	From the **Font Size** dropdown, select the required font size of the of the text entered in listview column. It ranges from 10 to 30 px.

Field	Description	Value
Text Alignment	Use to set the horizontal alignment of the value entered in the listview column.	From the **Text Alignment** dropdown, select one of the following options: • **Left** — Places the value to the left of the column. • **Center** — Places the value in the center of the column. • **Right** — Places the value to the right of the column.
Background Color	Use to specify the color of the listview column background.	Specify the listview column background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Font Color	Use to set the color of the text entered in the listview column.	Specify the column text color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Listview Rows		
Height	Use to specify the height of the listview rows.	From the **Height** dropdown, select one of the following options: • Compact • Large
Font Family	Use to set the font of the text entered in the listview row.	From the **Font Family** dropdown, select the required font of the text entered in the listview row.
Font Style	Use to set the font style of the text entered in the listview row.	From the **Font Style** dropdown, select the required style. The available options are: • Normal • Bold Italic • Bold • Italic
Font Size	Use to set the font size of the text entered in the listview row.	From the **Font Size** dropdown, select the required font size of the of the text entered in the list view row. It ranges from 10 to 30 px.

Field	Description	Value
Text Alignment	Use to set the horizontal alignment of the value entered in the listview row.	From the **Text Alignment** dropdown, select one of the following options: • **Left** — Places the value to the left of the row. • **Center** — Places the value in the center of the row. • **Right** — Places the value to the right of the row.
Background Color	Use to specify the color of the listview column background.	Specify the listview row background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Font Color	Use to set the color of the text entered in the listview column.	Specify the listview row text color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Select Row/Cell Color	Use to set the color of the currently selected row.	Specify the currently selected row color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Hover Effect	Use to enable the hover effect in the listview.	Turn on the **Hover Effect** toggle to enable the hover effect in the listview.
Hover Color	Use to set the color of the hover effect.	Specify the hover color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the listview is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the listview visible on mobile devices.
On Tabs	Use to specify whether or not the listview is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the listview visible on tablet devices.

Advance Properties

Field	Description	Value
Enable	Use to specify whether the listview must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the listview in the form.
Visible	Use to specify whether the listview must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the listview is visible in the form.
Search Bar	Use to add or remove the search bar from the listview.	Turn on the **Search Bar** toggle to add the search bar field to the listview.
Hide Add Option	Use to hide or display the add record option in the listview.	Turn on the **Hide Add Option** toggle to hide the add record option in the listview.
Hide Delete Option	Use to hide or display the delete option with the listview.	Turn on the **Hide Delete Option** toggle to hide the delete record option from the listview.
Allow Download	Use to allow listview download in JSON format.	Turn on the **Allow Download** toggle to allow listview download.
Show checkboxes in disabled list view	Use to specify whether or not the checkboxes appear in the disabled state.	Turn on the **Show checkboxes in disabled table** toggle to display checkboxes in the listview disable state.
MultiSelect	Use to enable multiselect in the listview.	Turn on the **MultiSelect** toggle to display checkboxes in the listview disable state.

Field	Description	Value
Enable Time Zone	Use to enbale time zone in the listview.	Turn on the **Enable Time Zone** toggle to enable time zone in the listview.
Show Total	Use to display the total of all the columns.	Turn on the **Show Total** toggle to display the total of all columns.
Show Serial Number	Use to add the serial number column to the listview.	Turn on the **Show Serial Number** toggle to add the S. No. column to the listview.
Control Description	Use to provide a description of the listview.	In the **Control Description** text box, specify a brief description of the listview.
Table Scroll	Use to enable scrolling for the listview after it reaches a certain height or a specific number of rows.	Select one of the following option: • **Default (Scroll after 4 rows):** Select this option to enable scroll for the table after its 4 rows. By default this option is enabled. • **Custom (Set max no. of rows):** Select this option to customize the number of rows after which scrolling is enabled. Enter the desired number of rows in the **No. of Rows** field to enable scrolling after the specified number of rows. • **Custom (Table height in pixel):** Select this option to customize the table's scroll behavior based on its height in pixels. Enter the desired pixel height in the **Table Height** field to enable scrolling after the specified height of the table.
Mobile View	Use to specify listview appearance on the mobile device.	Turn on the **Show Table Row as Tile** toggle to transform each row of the table into a distinct tile. Select one of the following option: • **Vertically Stacked Tiles:** Select to arrange listview rows in a vertical stack of tiles. • **Horizontally Stacked Tiles:** Select to arrange listview rows in a horizontal stack of tiles.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the listview and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the listview and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the listview and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the listview and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Adding Advanced List View

An advanced list view is an enhanced version of the standard list view. In advanced list view, a modal opens as an overlay, allowing users to input list view data. The modal's design is customizable based on requirements.

To add an advanced list view to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Grid category, select **Advanced List View** and drag and drop it on the design canvas. The advance list view gets added to the canvas and the Quick Properties – ADVANCEDLISTVIEW dialog appears.
   It displays the following advanced list view properties:

- **Mapping** — Map the advanced list view to a data object field, linked with the form or portal.
- **Add Columns** — Use this option to add columns to the advanced list view. For more information, refer to the Configuring Advanced List View properties section.
- **Visible** — Turn on this toggle to display the advanced list view in the form or portal.
- **Enable** — Turn on this toggle to enable the advanced list view in the form or portal.
- Click **View all** to view the complete list of advanced list view properties. For detailed information on configuring advanced list view properties, refer to the Configuring Advanced List View properties section.

4. Click **Done** to save changes made to the advanced list view properties.
5. Save the form or portal.

Click the advanced list view area to view the following options:

Option	Description
Move	Use to move the advanced list view to a different column within the same section.
Settings	Use to open the Properties tab of the advanced list view.
Copy	Use to create a copy of the advanced list view.
Delete	Use to delete the advanced list view.

Additional options:

- Download — Click to download the advanced list view definition in JSON format to your computer.
- Delete — Click to delete the inserted advanced list view.

Configuring Advanced List View properties

To access the properties tab for an Advanced List View, you can use one of the following options:

- In the Quick Properties - ADVANCEDLISTVIEW dialog, click **View all**.
- On the canvas, select the advanced list view and then click the gear icon appearing on its boundary.
- On the canvas, select the advanced list view and then click the gear icon present alongside the Preview button in the upper-right corner.

For information on how to configure the Advanced List View properties, refer to the Configuring List View properties section.

Detailed Page

Use to create a page for the advanced list view. Click **Create from scratch** to invoke the Listview Overlay design canvas. Design the overlay as required and save the changes. Once the design is complete, an **Edit** button appears. To make modifications, click this button.

Adding Document List

Use the document list to allow the end user to upload documents to the form.

To add a document list to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Grid category, select **Document List** and then drag and drop it onto the design canvas. The document list gets added to the canvas and the Quick Properties – DocList dialog appears.
   It displays the following document list properties:
   - **Label** — Specify the document list field name.

- **Mapping** — Map the document list field to a data object field, linked with the form or portal.
- **Visible** — Turn on this toggle to display the document list field in the form or portal.
- **Enable** — Turn on this toggle to enable the document list field in the form or portal.
- Click **View all** to view the complete list of document list field properties. For detailed information on configuring document list field properties, refer to the Configuring Document List field properties section.

4. Click **Done** to save changes made to the document list field properties.
5. Save the form or portal.

Click the document list area to view the following options:

Option	Description
Move	Use to move the document list field to a different column within the same section.
Settings	Use to open the Properties tab of the document list field.
Download	Use to download the document list definition to your computer in JSON format.
Delete	Use to delete the document list field.
Upload document list	Click the ellipsis icon, and then select the upload document list option to upload a document list definition in JSON format from your computer.

Configuring Document List properties

To access the properties tab for a Document List field, you can use one of the following options:

- In the Quick Properties - DocList dialog, click **View all**.
- Select the document list field on the canvas and then click the gear icon appearing on its boundary.
- Select the document list field on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Document List field:

Basic

Field	Description	Value
Label	Use to specify a name for the document list field.	In the **Label** box, specify the name of the document list field.
Description	Use to specify a description of the document list field.	In the **Description** box, specify a description of the document list field.
Mapping	Use to associate the document list field with a corresponding data object field.	For procedural details, click here.

To map the document list field with a data object field, follow the below steps:

1. In the **Mapping** field, click the ellipsis icon •••. The Data Class Mapping section appears.

   > While mapping the document list control, you need to create array-type data objects. These data objects must have data fields with the following names: doctype, docname, docsize, doccomment, docindex, resourcetype, noofpageindoc, doccontrolid, latitude, and longitude. To create array-type data objects, see the Defining data object relations for array type controls section.

2. Click the required data object field and then click **Map**. You can use the search box to search for the required data object field by name.
3. Click **Save**.

   > Once you map a field, the option to **UnMap** appears. You can use this option to remove the mapping and select a different field instead.

Behaviour

Field	Description	Value
Visible	Use to specify whether the document list field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the document list field is visible in the form.
Enable	Use to specify whether the document list field must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the document list field in the form.
Mandatory	Use to mark the document list field as mandatory. It restricts the end user from leaving the field blank.	Turn on the **Mandatory** toggle to mark the document list field as mandatory and restrict the end user from leaving it empty. Upon enabling this toggle, the **Error message if not filled** text box appears, displaying the default error message. This message gets displayed if the end-user provides no or incorrect input in the field.

Style

Field	Description	Value
Document List Label		
Font Family	Use to set the font of the document list label.	From the **Font Family** dropdown, select the required font of the document list label.
Font Weight	Use to set the font weight of the document list label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Size	Use to set the font size of the document list label.	From the **Font Size** dropdown, select the required font size of the document list label. It ranges from 10 to 30 px.
Font Color	Use to set the color of the document list label.	Specify the document list label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Document Type Label		
Font Family	Use to set the font of the document type label.	From the **Font Family** dropdown, select the required font of the document type label.
Font Style	Use to set the font style of the document type label.	From the **Font Style** dropdown, select the required style. The available options are: • Normal • Bold Italic • Bold • Italic

Field	Description	Value
Font Size	Use to set the font size of the document type label.	From the **Font Size** dropdown, select the required font size of the of the document type label. It ranges from 10 to 30 px.
Font Color	Use to set the color of the document type label.	Specify the document type label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Upload Button Type		
Style Options	Use to select the button type.	Click the required style to select it.
Show Bulk Upload Button	Use to display the bulk upload fiels button in the document list field.	Turn on the **Show Bulk Upload Button** toggle to display the Upload Files button in the document list field.
Font Family	Use to set the font of the upload button label.	From the **Font Family** dropdown, select the required font of the upload button label.
Font Style	Use to set the font style of the upload button label.	From the **Font Style** dropdown, select the required style. The available options are: • Normal • Bold Italic • Bold • Italic
Font Size	Use to set the font size of the upload button label.	From the **Font Size** dropdown, select the required font size of the of the upload button label.
Font Color	Use to set the color of the upload button label.	Specify the upload button label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Field	Description	Value
Background Color	Use to specify the color of the upload button background.	Specify the upload button background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Corner Radius	Use to specify the corner radius of the upload button.	From the **Border Radius** dropdown, select the required upload button corner-radius.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the document list field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the document list field visible on mobile devices.
On Tabs	Use to specify whether or not the document list field is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the document list field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required space between the document list and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required space between the document listand the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required space between the document list and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Field	Description	Value
Spacing Bottom	Use to provide the required space between the document list and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Control Description	Use to provide a description of the document list field.	In the **Control Description** text box, specify a brief description of the table.

Adding Image

An image can be used for various purposes, such as enhancing the visual appeal of the form, providing visual cues to users, or helping users understand the context of the information they need to input.

To add an image field to the form or portal, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Media category, select **Image** and drag and drop it on the design canvas. The image field gets added to the canvas and the Quick Properties – IMAGE dialog appears.
   It displays the following text box properties:
   - **Label** — Specify the image field name.
   - **Add Icon** — Add an icon for the image field that represents its content and purpose.
   - **User Defined ID** — Specify an ID that uniquely identifies the imagefield in the system.
   - **Visible** — Turn on this toggle to display the image field in the form or portal.
   - Click **View all** to view the complete list of image field properties. For detailed information on configuring image field properties, refer to the Configuring Image field properties section.
4. Click **Done** to save changes made to the image field properties.

5. Save the form or portal.

Click the image field area to view the following options:

Option	Description
Move	Use to move the image field to a different column within the same section.
Settings	Use to open the Properties tab of the image field.
Copy	Use to create a copy of the image field.
Delete	Use to delete the image field.

Configuring Image field properties

To access the properties tab for an Image field, you can use one of the following options:

- In the Quick Properties - IMAGE dialog, click **View all**.
- Select the image field on the canvas and then click the gear icon appearing on its boundary.
- Select the image field on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of an Image field:

Basic

Field	Description	Value
Label	Use to specify a name for the image field.	In the **Label** text box, specify the image field name.
Image File or Image URL	Use to upload an image or fetch an image using a URL.	Select one of the following options: • **Image File** — This option lets you upload an image from your computer. In the **Upload Image** field, click the pin icon 📎 and select the required image from your computer. • **Image URL** — This option lets you fetch an image using a URL. In the **Image Url** field, specify the URL from where you want to retrieve the image.

Image Display

Field	Description	Value
Visible	Use to specify whether the image must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the image is visible in the form.
Stretch to Column's Width or Image Dimension	Use to specify the image dimension.	Select one of the following options: • **Stretch to Column's Width** — This option allows the image to stretech according to the column's width. • **Image Dimension** — This option lets you specify custom dimensions for the image. From the available dropdown, select the required image dimension unit. The available options are Pixels and Percentage. For **Pixels**, specify the **Width** and **Height** of the image in pixels. For **Percentage**, specify the **Image Size** in percentage.

Image Responsive Behaviour

Field	Description	Value
Scale Image	Use to specify the increase or decrease in image size.	In the **Scale Image** box, specify the required scaling.

Style

Field	Description	Value
Image Alignment	Use to set the horizontal alignment of the image in the column.	From the **Image Alignment** dropdown, select one of the following options: • **Left** — Places the image to the left of the column. • **Center** — Places the image in the center of the column. • **Right** — Places the image to the right of the column.
Border Color	Use to specify the image border color.	Specify the image border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Width	Use to specify the image border width.	From the **Border Width** dropdown, select the required image border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the image border radius.	From the **Border Radius** dropdown, select the required image border-radius. It ranges from 0 to 15 px.
Label-Option Alignment	Use to specify the alignment of the label with respect to the image.	From the **Label-Option Alignment** dropdown, select one of the following options: • **Top Down** — Places the label above the image. • **Left Right** — Places the label to the left of the image.
Font Family	Use to set the image label font.	From the **Font Family** dropdown, select the required image label font.

Field	Description	Value
Font Size	Use to set the image label font size.	From the **Font Size** dropdown, select the required image label font size. It ranges from 10 to 30 px.
Font Weight	Use to set the image label font weight.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the image label font color.	Specify the image label font color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the image field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the image field visible on mobile devices.
On Tabs	Use to specify whether or not the image field is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the image field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the image field and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the image field and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the image field and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the image field and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Control Description	Use to provide a description of the image field.	In the **Control Description** box, specify a brief description of the image field.

Events

For information on configuring events with a text box, refer to the Configuring events with form controls section.

Adding Image Carousel

An image carousel allows you to display a series of images in a sequential, usually horizontal, manner. Image carousels are often used in forms or portals to showcase multiple pieces of information, such as product images, testimonials, or step-by-step instructions.

To add an image carousel field to the form or portal, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Media category, select **Image Carousel** and drag and drop it on the design canvas. The image carousel field gets added to the canvas and the Quick Properties – IMAGECAROUSEL dialog appears.
   It displays the following image carousel properties:
   - **Add Image** — Click the pin icon 📎 to add up to five images to the carousel with the recommended image size of 1366 X 768 pixels.
   - **User Defined ID** — Specify an ID that uniquely identifies the image carousel in the system.
   - **Visible** — Turn on this toggle to display the image carousel in the form or portal.
   - **Allow Auto Scroll** — Turn on this toggle to allow auto scroll of images in the carousel.
   - Click **View all** to view the complete list of image carousel properties. For detailed information on configuring image carousel properties, refer to the Configuring Image Carousel properties section.
4. Click **Done** to save changes made to the image carousel properties.
5. Save the form or portal.

Click the image carousel field area to view the following options:

Option	Description
Move	Use to move the image carousel field to a different column within the same section.
Settings	Use to open the Properties tab of the image carousel field.
Copy	Use to create a copy of the image carousel field.
Delete	Use to delete the image carousel field.

Configuring Image Carousel properties

To access the properties tab for an Image Carousel field, you can use one of the following options:

- In the Quick Properties - IMAGECAROUSEL dialog, click **View all**.
- Select the image carousel field on the canvas and then click the gear icon appearing on its boundary.
- Select the image carousel field on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of an Image Carousel field:

Basic

Field	Description	Value
Upload Image	Use to upload images to the carousel.	In the **Upload Image** field, click the pin icon and select the required images from your computer. You can select up to five images with the recommended dimensions of 1366 X 768 pixels.
User Defined ID	Use to allocate a distinctive ID to the image carousel field, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.

Behaviour

Field	Description	Value
Visible	Use to specify whether the image carousel must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the image carousel is visible in the form.
Allow Auto Scroll	Use to allow the auto-scrolling of the images in the carousel.	Turn on the **Allow Auto Scroll** toggle to allow the auto-scrolling of the images in the carousel.
Image Height	Use to specify the image height in the carousel	In the **Image Height** box, specify the required height in pixels.
Autoplay Speed	Use to specify the autoplay speed of the images in the carousel.	In the **Autoplay Speed** box, specify the required autoplay speed in milliseconds. It must be greater than or equal to speed.
Speed	Use to specify the speed of the images in the carousel.	In the **Speed** box, specify the required speed in milliseconds. It must be less than or equal to autoplay speed.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the image carousel is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the image carousel visible on mobile devices.
On Tabs	Use to specify whether or not the image carousel is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the image carousel visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the image carousel and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the image carousel and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the image carousel and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the image carousel and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Advance Properties

Field	Description	Value
Control Description	Use to provide a description of the image carousel.	In the **Control Description** box, specify a brief description of the image carousel.

Adding Section

A section is a container-type control consisting of columns that allow you to drag and drop controls and add fields to the portal or form. Sections help you organize different sets of fields into different containers. For example, a section can contain fields asking for the educational details of a candidate.

To add a section to the portal, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Containers category, select **Section** and drag and drop it on the form canvas. The section gets added to the canvas and the Quick Properties – SECTION dialog appears.
   It consists of the below fields:
   - **Layout** — Select the layout with the required number of columns for the section.
   - **Label** — Specify the name of the field.
   - **Add Icon** — Allows adding an icon for the field.
   - **User Defined ID** — Uniquely identifies the field in the system.
   - Toggle switches (Visible, Enable, and Remove Header)
   - **Cancel** — Closes the Quick Properties – SECTION dialog without changing any properties.
   - **View all** — Invokes the properties section for the section control. For more information, refer to the Configuring Section properties section.
   - **Done** — Save changes made to the section properties.
4. Click **Save** in the upper-right corner of the form builder page.

Click the section area to view the following options:

Option	Description
Move	Use to move the section anywhere on the form canvas.
Settings	Use to open the settings or properties section of the section control.
Grid	Use to change the layout, that is, the number of columns in the section.

Option	Description
Download	Use to download the section definition to your local machine.
Delete	Use to delete the section.
More options	Click the ellipsis icon to perform the following options: • **Save as Template** — Use to save the section as a template. • **Import Control** — Use to import controls in the section from your local machine. • **Upload Section** — Use to upload section definition from your local machine.

Each section consists of one or more columns. You can add to create a portal or form according to your business requirements. Click the column area to view the following options:

Option	Description
Move	Use to move the column anywhere in the section.
Settings	Use to open the settings or properties of the column.
Delete	Use to delete the column from the section.

Configuring Section properties

To access the properties tab for a Section, you can use one of the following options:

- In the Quick Properties - SECTION dialog, click **View all**.
- Select the section on the canvas and then click the gear icon appearing on its boundary.
- Select the section on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Section:

Basic

Field	Description	Value
Import Section	Use to import a section in JSON format from your local machine into the form.	To import a section from your local machine, follow the below steps: 1. Click **Import Section**. 2. Select the required JSON file from your local machine. 3. Click **Open**. The Import Section dialog appears. It displays the selected JSON file's name. 4. Select one of the following options: • **New Section** — To add the imported section just below the currently selected section. • **Replace This Section** — To replace the current section with the imported one. 5. Click **Import**. The section gets imported into the form.
Upload Controls	Use to import various controls in JSON format from your local machine into the section. • Controls can be imported into a section in quantities that correspond to the number of columns within that section. For example, for a section containing 4 columns, you can import up to 4 controls.	To import a control from your local machine, follow the below steps: 1. Click **Upload Controls**. 2. Select the required JSON file from your local machine. 3. Click **Open**. The control gets imported into the section.
Label	Use to specify the section name.	In the **Label** text box, specify the name of the section. For example, *Educational Details*.

Field	Description	Value
Section Icon	Use to add an icon for the section that represents its content and purpose.	To add an icon for the section, follow the below steps: 1. In the **Section Icon** field, click the pin icon. 2. Select the required icon image from your local machine. 3. Click **Open**. The Section Icon field displays the name of the selected image file. You can click the cross icon to remove the added icon.
User Defined ID	Use to allocate a distinctive ID to the section, making it uniquely identifiable within the system.	In the **User Defined ID** text box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.

Layout

Enables the addition of a section with the required number of columns to the form.

Select one of the following section layouts:

- 1 COL — to add a section with a single column.
- 2 COL — to add a section with two columns.
- 3 COL — to add a section with three columns
- 4 COL — to add a section with four columns.
- 6 COL — to add a section with six columns.
- 12 COL — to add a section with twelve columns.

Behaviour

Field	Description	Value
Visible	Use to specify whether the section must be visible or hidden upon loading of the form.	Turn on the **Visible** toggle to ensure the section is visible upon form loading.
Enable	Use to specify whether the section must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the section in the form.

Field	Description	Value
ReadOnly Style	Use to display data in a read-only format. It restricts modifications and copying of value from the section.	Turn on the **ReadOnly Style** toggle to render data in a read-only format and prevent copying of value from the section.
Disable Collapse	Use to disable section collapse. Enabling this removes the collapse icon ⌄ from the section.	Turn on the **Disbale Collapse** toggle to remove the collapse option from the section.
Section Initially Collapsed	This option appears when you turn off the **Disable Collapse** toggle. Use to specify whether the section must appear collapsed or expanded upon initial loading of the form.	Turn on the **Section Initially Collapsed** toggle to make the section appear collapsed by default.
Get Data on Demand	This allows on-demand loading of data. Enabling it allows fetching of data within the section only when that specific section is accessed. When you disable this option, the data gets loaded automatically when the form is opened.	Turn on the **Get Data on Demand** toggle to enable on-demand loading of data within the section.
Remove Header	Use to remove the section header.	Turn on the **Remove Header** toggle to remove the section header.
Fix Section to Top	Use to fix the section to the top of the page.	Turn on the **Fix Section to Top** toggle to fix the section to the top of the page.
Stretch Section to page width	Use to allow the section to stretch and adjust as per the page width.	Turn on the **Stretch Section to page width** toggle to allow the section to stretch and match the page width.
Fix Position when Scrolling	Use to keep the section's position constant while scrolling within the form.	Turn on the **Fix Position when Scrolling** toggle to keep the section position constant while scrolling within the form.

Field	Description	Value
ReadOnly	Use to display data in a read-only format. It restricts modifications but allows copying of value from the section.	Turn on the **ReadOnly** toggle to render data in a read-only format and prevent copying of value from the section.

Style

Field	Description	Value
Style Options	Use to select the section style.	Click the required style to select it. The default selection is *Style 2*.
Header Color	Use to set the color of the section header.	Specify the section header color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Label Color	Use to set the color of the section label.	Specify the section label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Font Family	Use to set the font of the section label.	From the **Font Family** dropdown, select the required font of the section label.
Font Size	Use to set the font size of the section label.	From the **Font Size** dropdown, select the required font size of the section label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the section label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic

Section Background

<table>
<tr><th>Field</th><th>Description</th><th>Value</th></tr>
<tr><td colspan="3">Color — Use to set a color as the section background. This option is selected by default.</td></tr>
<tr><td>Background Color</td><td>Use to specify the color of the section background.</td><td>Specify the section background color using one of the following options:
• Specify the hex code for the required color.
• Click the color picker icon and pick the required color.</td></tr>
<tr><td>Border Color</td><td>Use to specify the color of the section border.</td><td>Specify the section border color using one of the following options:
• Specify the hex code for the required color.
• Click the color picker icon and pick the required color.</td></tr>
<tr><td>Border Width</td><td>Use to specify the width of the section border.</td><td>From the Border Width dropdown, select the required section border width. It ranges from 0 to 11 px.</td></tr>
<tr><td>Border Radius</td><td>Use to specify the radius of the section border.</td><td>From the Border Radius dropdown, select the required section border-radius. It ranges from 0 to 15 px.</td></tr>
<tr><td colspan="3">Image — Use to set an image as the section background. Click Image to view the following options:</td></tr>
</table>

Field	Description	Value
Upload Image	Use to upload an image as the background for the section.	To upload an image for the section background, follow the below steps: 1. In the **Upload Image** field, click the pin icon. 2. Select the required image from your local machine. • The recommended image size is 1366 X 768 pixels. 3. Click **Open**. The Upload Image field displays the name of the selected image file. You can click the cross icon to remove the selected image.
Overlay on Image	Use to allow the placing of color over the background image (as an overlay or foreground) in such a way that the overlay color partially or completely covers the background image.	Turn on the **Overlay on Image** toggle to allow color overlays on the section background image.
Overlay Color	Use to specify the color of the image overlay. This option gets enabled when you turn on the Overlay on Image toggle.	Specify the overlay color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Overlay Opacity	Use to specify the opacity or transparency of the overlay. This option gets enabled when you turn on the Overlay on Image toggle.	Specify the opacity of the overlay using one of the following options: • In the **Overlay Opacity** field, specify the required percentage opacity. For example, *35%*. • Use the slider under the **Overlay Opacity** option to adjust the opacity as required.
Border Radius	Use to specify the radius of the background image.	From the **Border Radius** dropdown, select the required image border radius. It ranges from 0 to 15 px.

Field	Description	Value
Carousel — Use to set a slideshow of images (carousel) as the section background. Click **Carousel** to view the following options:		
Upload Image	Use to to upload images for the background carousel of the section.	To upload images for the section background carousel, follow the below steps: 1. In the **Upload Image** field, click the pin icon . 2. Select the required image from your local machine. The recommended image size is 1366 X 768 pixels. 3. Click **Open**. A field displaying the name of the selected image file appears. 4. Follow steps 1 to 3 to add more images to the carousel. You can upload up to five images to the carousel. You can click the cross icon to remove the selected image.
Overlay on Image	Use to allow the placing of color over the background image (as an overlay or foreground) in such a way that the overlay color partially or completely covers the background image.	Turn on the **Overlay on Image** toggle to allow color overlays on the section background image.
Overlay Color	Use to specify the color of the image overlay. This option gets enabled when you turn on the **Overlay on Image** toggle.	Specify the overlay color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.

Field	Description	Value
Overlay Opacity	Use to specify the opacity or transparency of the overlay. This option gets enabled when you turn on the **Overlay on Image** toggle.	Specify the opacity of the overlay using one of the following options: • In the **Overlay Opacity** field, specify the required percentage opacity. For example, *35%*. • Use the slider under the **Overlay Opacity** option to adjust the opacity as required.
Border Radius	Use to specify the radius of the background image.	From the **Border Radius** dropdown, select the required image boborder-radiusIt ranges from 0 to 15 px.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the section is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the section visible on mobile devices.
On Tabs	Use to specify whether or not the section is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the section visible on tablet devices.

Spacing

Field	Description	Value
Outer Padding	Use this option to adjust the space surrounding the section.	Select **Vertical Spacing** and **Horizontal Spacing** under the outer padding tab from the dropdown menu as needed. You can also enter the value manually. It ranges from 0 to 200 px.
Inner Padding	Use this option to adjust the space surrounding the columns within the section.	Select **Spacing Left**, **Spacing Right**, **Spacing Top**, and **Spacing Bottom** under the inner padding tab from the dropdown menu as needed. You can also enter the value manually. It ranges from 0 to 200 px.

Advance Properties

Field	Description	Value
Control Description	Use to provide a description of the section.	In the **Control Description** text box, specify a brief description of the section.

Events

For information on configuring events with a section, refer to the Configuring events with form controls section.

Configuring Column properties

To access the properties tab for a Column, you can use one of the following options:

- Select the column within the canvas and then click the gear icon appearing on its boundary.
- Select the column on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Column:

Basic

Field	Description	Value
Column Width	Use to set the width of the section column.	Specify the column width using one of the following options: • From the **Column Width** dropdown, specify the required column width. It ranges from 1 to 12 px. • Use the slider under the **Column Width** option to adjust the width as required.
Height	Use to set the height of the section column.	Select one of the following options: • **Auto Height** — To enable the column to automatically adjust its height based on the column width. • **Set Height** — To specify the required height of the section column. Upon selecting this option, the **Height** text box appears. Specify the required column height in it.

Responsive Behaviour

Field	Description	Value
Column Width (Tablet)	Use to specify the width the column must have when the form is viewed on a tablet device.	Specify the column width for tablet devices using one of the following options: • From the **Column Width** dropdown, specify the required column width. It ranges from 1 to 12 px. • Use the slider under the **Column Width** option to adjust the width as required.
Column Width (Mobile)	Use to specify the width the column must have when the form is viewed on a mobile device.	Specify the column width for mobile devices using one of the following options: • From the **Column Width** dropdown, specify the required column width. It ranges from 1 to 12 px. • Use the slider under the **Column Width** option to adjust the width as required.
Remove Padding	Use to remove the space surrounding the section column.	Turn on the **Remove Padding** toggle to eliminate the space surrounding the section column.

Adding Horizontal Tabs

Use the tabs-horizontal control to add a horizontal navigation panel to your form. You can link multiple pages to each step of the panel. This control is useful when you want to create a multi-step form.

To add horizontal tabs to the form, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Containers category, select **Tabs-Horizontal** and drag and drop it on the form canvas. The horizontal tab gets added to the canvas and the Quick Properties – TAB dialog appears.
   It consists of the below fields:
   - **Tab Labels** — Specify the name of the each tab. Upon turning on the **Add Icon** toggle, you can add an icon for each tab.
   - **Add Tab** — Allows you to add more tabs to the navigation panel.
   - Toggle switches (Enable and ReadOnly)
   - **Cancel** — Closes the Quick Properties – TAB dialog without changing any properties.
   - **View all** — Invokes the properties section for the tab area. For more information, refer to the Configuring Horizontal Tab properties section. Click any sheet to view sheet specific properties.
   - **Done** — Save changes made to the tab area properties.
4. Click **Save** in the upper-right corner of the form builder page.

Click the tab area to view the following options:

Option	Description
Move	Use to move the tab area anywhere on the form canvas.
Settings	Use to open the settings or properties section of the tab area control.
Download	Use to download the tab area definition to your local machine.
Delete	Use to delete the tab area.
More options	Click the ellipsis icon to upload horizontal tab definition from your local machine.

Configuring Horizontal Tab properties

To access the properties tab for a horizontal tab, you can use one of the following options:

- In the Quick Properties - TAB dialog, click **View all**.
- Select the horizontal tab on the canvas and then click the gear icon appearing on its boundary.
- Select the horizontal tab on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a horizontal tab:

Basic

Field	Description	Value
Tab Label	Use to specify the tab name.	In the provided box, specify the tab name.
Add Icons	Use to allow adding an icon for the tab that represents its content and purpose.	Turn on the **Add Icons** toggle to allow adding an icon for the stab. Upon enabling this option, an add icon field appears below the Tab Label field. To add an icon for the step, follow the below steps: 1. Click the pin icon . The Open dialog appears. 2. Select the required icon image from your computer. 3. Click **Open**. The Add Icon field displays the name of the selected image file. You can click the cross icon to remove the added icon.
Add Tab	Use to add more main tabs to the wizard.	Click **Add Step** to add a tab.

Layout

Field	Description	Value
Style Options	Use to select the horizontal tab style.	Click the required option to select it.

Behaviour

Field	Description	Value
Visible	Use to specify whether the section must be visible or hidden upon loading of the form.	Turn on the **Visible** toggle to ensure the section is visible upon form loading.
Enable	Use to specify whether the section must appear enabled or disabled in the form.	Turn on the **Enable** toggle to enable the section in the form.
ReadOnly Style	Use to display data in a read-only format. It restricts modifications and copying of value from the section.	Turn on the **ReadOnly Style** toggle to render data in a read-only format and prevent copying of value from the section.
Read Only	Use to display data in a read-only format. It restricts modifications but allows copying of value from the section.	Turn on the **ReadOnly** toggle to render data in a read-only format and prevent copying of value from the section.
Fix Tab Headers	Use to fix the tab headers.	Turn on the **Fix Tab Headers** toggle to fix the headers to the top.
Show Save Buttons	Use to display or hide the save buttons from the horizontal tab.	Turn on the **Show Save Buttons** toggle to display the save buttons with the horizontal tab.

Active Tab

Field	Description	Value
Font Family	Use to set the active tab label font.	From the **Font Family** dropdown, select the required active tab label font.
Font Size	Use to set the active tab label font size.	From the **Font Size** dropdown, select the required active tab label font size. It ranges from 10 to 30 px.
Font Weight	Use to set the active tab label font weight.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the active tab label font color.	Specify the active tab label font color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Back Color	Use to set the active tab background color.	Specify the active tab background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Inactive Tab

Field	Description	Value
Font Family	Use to set the inactive tab label font.	From the **Font Family** dropdown, select the required inactive tab label font.
Font Size	Use to set the inactive tab label font size.	From the **Font Size** dropdown, select the required inactive tab label font size. It ranges from 10 to 30 px.
Font Weight	Use to set the inactive tab label font weight.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the inactive tab label font color.	Specify the inactive tab label font color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Back Color	Use to set the inactive tab background color.	Specify the inactive tab background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Tab Appearance

Field	Description	Value
Tab Background Color	Use to specify the tab background color.	Specify the tab background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Show Border	Use to display or hide the tab border.	Turn on the **Show Border** toggle to display the tab border.
Border Color	Use to specify the tab border color.	Specify the tab border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Width	Use to specify the tab border width.	From the **Border Width** dropdown, select the required tab border width. It ranges from 0 to 11 px.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the horizontal tab is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the horizontal tab visible on mobile devices.
On Tabs	Use to specify whether or not the horizontal tab is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the horizontal tab visible on tablet devices.

Spacing

Field	Description	Value
Outer Padding	Use this option to adjust the space surrounding the section.	Select **Vertical Spacing** and **Horizontal Spacing** under the outer padding tab from the dropdown menu as needed. You can also enter the value manually. It ranges from 0 to 200 px.
Inner Padding	Use this option to adjust the space surrounding the columns within the section.	Select **Spacing Left**, **Spacing Right**, **Spacing Top**, and **Spacing Bottom** under the inner padding tab from the dropdown menu as needed. You can also enter the value manually. It ranges from 0 to 200 px.

Advance Properties

Field	Description	Value
Next and Prev buttons together	Use to specify if the Back and Previous buttons are placed together at the bottom-right corner of the horizontal tab.	Turn on the **Next and Prev buttons together** to place these buttons together in the bottom-right corner of the horizontal tab.
Next and Prev buttons on opposite end	Use to specify if the Back and Previous buttons are placed opposite to each other at the bottom of the horizontal tab.	Turn on the **Next and Prev buttons on opposite end** to place these buttons opposite to each other at the bottom of the horizontal tab.
Control Description	Use to provide a description of the horizontal tab.	In the **Control Description** box, specify a brief description of the horizontal tab.

Adding Vertical Tabs

Use the tabs-vertical control to add a vertical navigation panel to your form. You can link multiple pages to each step of the panel. This control is useful when you want to create a multi-step form.

To add vertical tabs to the form, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Containers category, select **Tabs-Vertical** and drag and drop it on the form canvas. The vertical tab gets added to the canvas and the Quick Properties – SideNavigation dialog appears.
   It consists of the below fields:
   - Specify the name of each tab.
     Upon turning on the **Add Icon** toggle, you can add an icon for each tab.
     Upon turning on the **Substeps** toggle, you can add a substep to each step of the navigation panel.
   - **Add Step** — Allows you to add more steps to the vertical navigation panel.
   - **Cancel** — Closes the Quick Properties – SideNavigation dialog without changing any properties.
   - **View all** — Invokes the properties section for the side navigation. For more information, refer to the Configuring Vertical Tab properties section. Click any step to view step specific properties.
   - **Done** — Save changes made to the side navigation properties.
4. Click **Save** in the upper-right corner of the form builder page.

Click the side navigation to view the following options:

Option	Description
Move	Use to move the side navigation anywhere on the form canvas.
Settings	Use to open the settings or properties section of the side navigation control.
Download	Use to download the side navigation definition to your local machine.
Delete	Use to delete the side navigation.

Option	Description
More options	Click the ellipsis icon to upload vertical tab definition from your local machine.

Configuring Vertical Tab properties

To access the properties tab for a vertical tab, you can use one of the following options:

- In the Quick Properties - SideNavigation dialog, click **View all**.
- Select the vertical tab on the canvas and then click the gear icon appearing on its boundary.
- Select the vertical tab on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a vertical tab:

Basic

Field	Description	Value
Step Label	Use to specify the step name.	In the provided box, specify the step name.
Add Icons	Use to allow adding an icon for the step that represents its content and purpose.	Turn on the **Add Icons** toggle to allow adding an icon for the step. Upon enabling this option, an add icon field appears below the Menu Label field. To add an icon for the step, follow the below steps: 1. Click the pin icon . The Open dialog appears. 2. Select the required icon image from your computer. 3. Click **Open**. The Add Icon field displays the name of the selected image file. You can click the cross icon to remove the added icon.

Field	Description	Value
Substeps	Use to allow adding a substep to the selected menu.	Turn on the **Substeps** toggle to allow adding substeps to the selected main menu. Click + **Sub Step** to add the sub step to the main step. From the **Select Subform**, select the required subform to associate with the substep.
Add Step	Use to add more main steps to the vertical tabs.	Click **Add Step** to add a step to the vertical tabs.

Layout

Field	Description	Value
Style Options	Use to select the vertical wizard style.	Click the required option to select it.

Behaviour

Field	Description	Value
Navigation Between Steps	Use to specify how end users can navigate between tabs steps.	Select one of the following options: • **Only through Buttons** — to allow navigation through the Back and Next buttons only. • **Both through buttons and click on steps** — to allow navigation through both Back and Next buttons, and by clicking on the required step.
Fixed Wizard Footer	Use to fix the wizard footer with respect to wizard content.	Turn on the **Fixed Wizard Footer** toggle to fix the Wizard footer in the form.

Step Appearance

Field	Description	Value
Steps Label		
Font Family	Use to set the font of the step label.	From the **Font Family** dropdown, select the required font for the step label.
Font Size	Use to set the step label font size.	From the **Font Size** dropdown, select the required font size of the step label. It ranges from 10 to 30 px.
Substep Font Size	Use to set the substep label font size.	From the **Font Size** dropdown, select the required font size of the substep label. It ranges from 10 to 30 px.
Active Step		
Step Count Color	Use to set the active step count color.	Specify the active step count color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Step Background Color	Use to set the active step background color.	Specify the active step background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Field	Description	Value
Font Color	Use to set the active step label color.	Specify the active step label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Font Weight	Use to set the active step label font weight.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic
	Inactive Step	
Step Count Color	Use to set the inactive step count color.	Specify the inactive step count color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Font Color	Use to set the inactive step label color.	Specify the inactive step label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Field	Description	Value
Font Weight	Use to set the inactive step label font weight.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic

Wizard Appearance

Field	Description	Value
Background Color	Use to specify the wizard background color.	Specify the wizard background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Show Border	Use to display or hide the wizard border.	Turn on the **Show Border** toggle to display the wizard border.
Border Color	Use to specify the wizard border color.	Specify the wizard border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Width	Use to specify the wizard border width.	From the **Border Width** dropdown, select the required wizard border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the wizard border radius.	From the **Border Radius** dropdown, select the required wizard border-radius. It ranges from 0 to 15 px.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the vertical wizard is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the vertical wizard visible on mobile devices.
On Tabs	Use to specify whether or not the vertical wizard is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the vertical wizard visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the vertical wizard and the left boundary of the design canvas.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 200 px.
Spacing Right	Use to provide the required amount of space between the vertical wizard and the right boundary of the design canvas.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 200 px.
Spacing Top	Use to provide the required amount of space between the vertical wizard and the top boundary of the design canvas.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 200 px.
Spacing Bottom	Use to provide the required amount of space between the vertical wizard and the bottom boundary of the design canvas.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 200 px.

Advance Properties

Field	Description	Value
Next and Prev buttons together	Use to specify if the Back and Previous buttons are placed together at the bottom-right corner of the vertical wizard.	Turn on the **Next and Prev buttons together** to place these buttons together in the bottom-right corner of the vertical wizard.
Next and Prev buttons on opposite end	Use to specify if the Back and Previous buttons are placed opposite to each other at the bottom of the vertical wizard.	Turn on the **Next and Prev buttons on opposite end** to place these buttons opposite to each other at the bottom of the vertical wizard.
Control Description	Use to provide a description of the vertical wizard.	In the **Control Description** box, specify a brief description of the vertical wizard.

Adding Horizontal Wizard

Use the wizard-horizontal control to add a horizontal wizard containing multiple steps to your form. You can link multiple pages to each step of the wizard.

To add horizontal wizard to the form, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Containers category, select **Wizard -Horizontal** and drag and drop it on the form canvas. The horizontal wizard gets added to the canvas and the Quick Properties – Wizard_H dialog appears.
   It consists of the below fields:
   - Specify the name of the each step.
     Upon turning on the **Add Icon** toggle, you can add an icon for each step.
     Upon turning on the **Substeps** toggle, you can add a substep to each step of the wizard
   - **Add Step** — Allows you to add more step to the horizontal wizard.
   - **Cancel** — Closes the Quick Properties – Wizard_H dialog without changing any properties.
   - **View all** — Invokes the properties section for the horizontal wizard. For more information, refer to the Configuring Horizontal Wizard properties section.
   - **Done** — Save changes made to the horizontal wizard properties.
4. Click **Save** in the upper-right corner of the form builder page.

Click the horizontal wizard to view the following options:

Option	Description
Move	Use to move the horizontal wizard anywhere on the form canvas.
Settings	Use to open the settings or properties section of the horizontal wizard control.
Download	Use to download the horizontal wizard definition to your local machine.
Delete	Use to delete the horizontal wizard.
More options	Click the ellipsis icon to upload horizontal wizard definition from your local machine.

Configuring Horizontal Wizard properties

To access the properties tab for a horizontal wizard, you can use one of the following options:

- In the Quick Properties - Wizard_H dialog, click **View all**.
- Select the horizontal wizard on the canvas and then click the gear icon appearing on its boundary.
- Select the horizontal wizard on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a horizontal wizard:

Basic

Field	Description	Value
Step Label	Use to specify the step name.	In the provided box, specify the step name.
Add Icons	Use to allow adding an icon for the step that represents its content and purpose.	Turn on the **Add Icons** toggle to allow adding an icon for the step. Upon enabling this option, an add icon field appears below the Menu Label field. To add an icon for the step, follow the below steps: 1. Click the pin icon . The Open dialog appears. 2. Select the required icon image from your computer. 3. Click **Open**. The Add Icon field displays the name of the selected image file. You can click the cross icon to remove the added icon.
Substeps	Use to allow adding a substep to the selected menu.	Turn on the **Substeps** toggle to allow adding substeps to the selected main menu. Click + **Sub Step** to add the sub step to the main step. From the **Select Subform**, select the required subform to associate with the substep.

Field	Description	Value
Add Step	Use to add more main steps to the wizard.	Click **Add Step** to add a step to the wizard.

Layout

Field	Description	Value
Style Options	Use to select the horizontal wizard style.	Click the required option to select it.

Behaviour

Field	Description	Value
Navigation Between Steps	Use to specify how end users can navigate between wizard steps.	Select one of the following options: • **Only through Buttons** — to allow navigation through the Back and Next buttons only. • **Both through buttons and click on steps** — to allow navigation through both Back and Next buttons, and by clicking on the required step.
Fixed Wizard Footer	Use to fix the wizard footer with respect to wizard content.	Turn on the **Fixed Wizard Footer** toggle to fix the Wizard footer in the form.

Step Appearance

Field	Description	Value
Font Family	Use to set the font of the step label.	From the **Font Family** dropdown, select the required font for the step label.
Font Size	Use to set the step label font size.	From the **Font Size** dropdown, select the required font size of the step label. It ranges from 10 to 30 px.
Substep Font Size	Use to set the substep label font size.	From the **Font Size** dropdown, select the required font size of the substep label. It ranges from 10 to 30 px.

Wizard Appearance

Field	Description	Value
Background Color	Use to specify the wizard background color.	Specify the wizard background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Show Border	Use to display or hide the wizard border.	Turn on the **Show Border** toggle to display the wizard border.
Border Color	Use to specify the wizard border color.	Specify the wizard border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Width	Use to specify the wizard border width.	From the **Border Width** dropdown, select the required wizard border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the wizard border radius.	From the **Border Radius** dropdown, select the required wizard border-radius. It ranges from 0 to 15 px.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the horizontal wizard is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the horizontal wizard visible on mobile devices.
On Tabs	Use to specify whether or not the horizontal wizard is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the horizontal wizard visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the horizontal wizard and the left boundary of the design canvas.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 200 px.
Spacing Right	Use to provide the required amount of space between the horizontal wizard and the right boundary of the design canvas.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 200 px.
Spacing Top	Use to provide the required amount of space between the horizontal wizard and the top boundary of the design canvas.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 200 px.
Spacing Bottom	Use to provide the required amount of space between the horizontal wizard and the bottom boundary of the design canvas.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 200 px.

Advance Properties

Field	Description	Value
Next and Prev buttons together	Use to specify if the Back and Previous buttons are placed together at the bottom-right corner of the horizontal wizard.	Turn on the **Next and Prev buttons together** to place these buttons together in the bottom-right corner of the horizontal wizard.
Next and Prev buttons on opposite end	Use to specify if the Back and Previous buttons are placed opposite to each other at the bottom of the horizontal wizard.	Turn on the **Next and Prev buttons on opposite end** to place these buttons opposite to each other at the bottom of the horizontal wizard.
Control Description	Use to provide a description of the horizontal wizard.	In the **Control Description** box, specify a brief description of the horizontal wizard.

Adding Vertical Wizard

A vertical wizard divides your form into multiple steps or sections, each representing a distinct part of the form. For example, in an e-commerce checkout form, you have steps for *Shipping Information*, *Billing Information*, and *Order Review*.

To add a vertical wizard to the form or portal, follow the below steps:

1. Open the required portal or form. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Containers category, select **Wizard-Vertical** and drag and drop it on the design canvas. The vertical wizard gets added to the canvas and the Quick Properties – Wizard_V dialog appears.
   It displays the following vertical wizard properties:
   - **Step Label** — Specify the step name.
   - **Add Icons** — Turn on this toggle to allow adding an icon to the steps. Upon enabling this, a field to add an icon for each step appears. Click the pin icon to select the icon image from your computer.
   - **Substeps** — Turn on this toggle to allow adding substeps. Upon enabling this, an option to add a substep for each step appears. Click the **+ Sub Step** and then provide the required sub-step label.
   - **+ Add Step** — Click this option to add more steps to the form or portal. By default, two four are added.
   - Click **View all** to view the complete list of vertical wizard properties. For detailed information on configuring vertical wizard properties, refer to the Configuring Vertical Wizard properties section.
4. Click **Done** to save changes made to the vertical wizard properties.
5. Save the form or portal.

Click the vertical wizard to view the following options:

Option	Description
Move	Use to move the vertical wizard.
Settings	Use to open the Properties tab of the vertical wizard.
Download	Use to download the vertical wizard definition to your computer in JSON format.
Delete	Use to delete the vertical wizard from the form or portal.

Configuring Vertical Wizard properties

To access the properties tab for a vertical wizard, you can use one of the following options:

- In the Quick Properties - Wizard_V dialog, click **View all**.
- Select the vertical wizard on the canvas and then click the gear icon appearing on its boundary.
- Select the vertical wizard on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a vertical wizard:

Basic

Field	Description	Value
Step Label	Use to specify the step name.	In the provided box, specify the step name.
Add Icons	Use to allow adding an icon for the step that represents its content and purpose.	Turn on the **Add Icons** toggle to allow adding an icon for the step. Upon enabling this option, an add icon field appears below the Menu Label field. To add an icon for the step, follow the below steps: 1. Click the pin icon . The Open dialog appears. 2. Select the required icon image from your computer. 3. Click **Open**. The Add Icon field displays the name of the selected image file. You can click the cross icon to remove the added icon.
Substeps	Use to allow adding a substep to the selected menu.	Turn on the **Substeps** toggle to allow adding substeps to the selected main menu. Click + **Sub Step** to add the sub step to the main step. From the **Select Subform**, select the required subform to associate with the substep.

Field	Description	Value
Add Step	Use to add more main steps to the wizard.	Click **Add Step** to add a step to the wizard.

Layout

Field	Description	Value
Style Options	Use to select the vertical wizard style.	Click the required option to select it.

Behaviour

Field	Description	Value
Navigation Between Steps	Use to specify how end users can navigate between wizard steps.	Select one of the following options: • **Only through Buttons** — to allow navigation through the Back and Next buttons only. • **Both through buttons and click on steps** — to allow navigation through both Back and Next buttons, and by clicking on the required step.
Fixed Wizard Footer	Use to fix the wizard footer with respect to wizard content.	Turn on the **Fixed Wizard Footer** toggle to fix the Wizard footer in the form.

Step Appearance

Field	Description	Value
Steps Label		
Font Family	Use to set the font of the step label.	From the **Font Family** dropdown, select the required font for the step label.

Field	Description	Value
Font Size	Use to set the step label font size.	From the **Font Size** dropdown, select the required font size of the step label. It ranges from 10 to 30 px.
Substep Font Size	Use to set the substep label font size.	From the **Font Size** dropdown, select the required font size of the substep label. It ranges from 10 to 30 px.
Active Step		
Step Count Color	Use to set the active step count color.	Specify the active step count color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Step Background Color	Use to set the active step background color.	Specify the active step background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Font Color	Use to set the active step label color.	Specify the active step label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Field	Description	Value
Font Weight	Use to set the active step label font weight.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic
Inactive Step		
Step Count Color	Use to set the inactive step count color.	Specify the inactive step count color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Font Color	Use to set the inactive step label color.	Specify the inactive step label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Field	Description	Value
Font Weight	Use to set the inactive step label font weight.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic

Wizard Appearance

Field	Description	Value
Background Color	Use to specify the wizard background color.	Specify the wizard background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Show Border	Use to display or hide the wizard border.	Turn on the **Show Border** toggle to display the wizard border.
Border Color	Use to specify the wizard border color.	Specify the wizard border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Width	Use to specify the wizard border width.	From the **Border Width** dropdown, select the required wizard border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the wizard border radius.	From the **Border Radius** dropdown, select the required wizard border-radius. It ranges from 0 to 15 px.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the vertical wizard is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the vertical wizard visible on mobile devices.
On Tabs	Use to specify whether or not the vertical wizard is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the vertical wizard visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the vertical wizard and the left boundary of the design canvas.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 200 px.
Spacing Right	Use to provide the required amount of space between the vertical wizard and the right boundary of the design canvas.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 200 px.
Spacing Top	Use to provide the required amount of space between the vertical wizard and the top boundary of the design canvas.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 200 px.
Spacing Bottom	Use to provide the required amount of space between the vertical wizard and the bottom boundary of the design canvas.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 200 px.

Advance Properties

Field	Description	Value
Next and Prev buttons together	Use to specify if the Back and Previous buttons are placed together at the bottom-right corner of the vertical wizard.	Turn on the **Next and Prev buttons together** to place these buttons together in the bottom-right corner of the vertical wizard.

Field	Description	Value
Next and Prev buttons on opposite end	Use to specify if the Back and Previous buttons are placed opposite to each other at the bottom of the vertical wizard.	Turn on the **Next and Prev buttons on opposite end** to place these buttons opposite to each other at the bottom of the vertical wizard.
Control Description	Use to provide a description of the vertical wizard.	In the **Control Description** box, specify a brief description of the vertical wizard.

Adding Menu

Menus with multiple tabs allow users to navigate between different sections or pages of a form or portal. Each tab represents a distinct category or content area, and clicking on a tab typically loads the corresponding content. For example, an *Email Management* portal can have menus such as *Inbox*, *Sent*, *Draf*t, and *Spam*.

To add a menu to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Containers category, select **Menu** and drag and drop it on the design canvas. The menu field gets added to the canvas and the Quick Properties – MENU dialog appears.
   It displays the following menu properties:
   - **Menu Label** — Specify the menu name.
   - **Add Icons** — Turn on this toggle to allow adding an icon to the menu. Upon enabling this, a field to add an icon for each menu appears. Click the pin icon to select the icon image from your computer.
   - **+ Add Menu Label** — Click this option to add more menus to the form or portal. By default, two menus are added.
   - **User Defined ID** — Specify an ID that uniquely identifies the menu in the system.
   - Click **View all** to view the complete list of menu properties. For detailed information on configuring menu properties, refer to the Configuring Menu properties section.
4. Click **Done** to save changes made to the menu properties.
5. Save the form or portal.

Click the menu to view the following options:

Option	Description
Move	Use to move the menu.
Settings	Use to open the Properties tab of the menu.
Delete	Use to delete the menu from the form or portal.

Configuring Menu properties

To access the properties tab for a menu, you can use one of the following options:

- In the Quick Properties - MENU dialog, click **View all**.
- Select the menu on the canvas and then click the gear icon appearing on its boundary.
- Select the menu on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Menu:

Basic

Field	Description	Value
Menu Label	Use to specify the menu name.	In the **Menu Label** box, specify the menu name. For example, *Inbox*, *Spam,* and more.
Style	Use to specify whether the menu label must appear as clickable text or button.	In the **Style** field, select one of the following: • **Text** — This option displays the menu label as clickable text. • **Button** — This option displays the menu label as a button.

Field	Description	Value
Add Icons	Use to allow adding an icon for the menu that represents its content and purpose.	Turn on the **Add Icons** toggle to allow adding an icon for the menu. Upon enabling this option, an add icon field appears below the Menu Label field. To add an icon for the menu, follow the below steps: 1. Click the pin icon . The Open dialog appears. 2. Select the required icon image from your computer. 3. Click **Open**. The Add Icon field displays the name of the selected image file. You can click the cross icon to remove the added icon.
Submenus	Use to allow adding a submenu to the selected menu.	Turn on the **Submenus** toggle to allow adding submenus to the selected main menu.
Add Main Menu	Use to add more main menus to the form or portal.	Click **+ Add Main Menu** to add a menu to the form or portal.

Menu Layout

Field	Description	Value
Style Options	Use to select the text box style.	Click the required style to select it. The default selection is *Style 1*.
Menu Background	Use to specify the menu background color.	Specify the menu background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Color	Use to specify the menu border color.	Specify the menu border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.

Field	Description	Value
Border Width	Use to specify the menu border width.	From the **Border Width** dropdown, select the required menu border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the menu border radius.	From the **Border Radius** dropdown, select the required menu border-radius. It ranges from 0 to 15 px.
Menu Alignment	Use to define the alignment of the menu buttons.	From the **Menu Alignment** dropdown, select one of the following options: • **Left** — This option places the menu buttons in the upper-left corner of the form or portal. • **Right** —This option places the menu buttons in the upper-right corner of the form or portal.

Tab Behaviour

Field	Description	Value
Read Only Style	Use to display data in a read-only format. It restricts modifications and copying of value from the menu.	Turn on the **ReadOnly Style** toggle to render data in a read-only format and prevent copying of value from the menu.

Active Menu Link

Field	Description	Value
Font Family	Use to set the font of the active menu link label.	From the **Font Family** dropdown, select the required font of the active menu link label.
Font Size	Use to set the font size of the active menu link label.	From the **Font Size** dropdown, select the required font size of the active menu link label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the active menu link label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the active menu link label color.	Specify the active menu link label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Background Color	Use to specify the active menu link background color.	Specify the active menu link background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.

Inactive Menu Link

Field	Description	Value
Font Family	Use to set the font of the inactive menu link label.	From the **Font Family** dropdown, select the required font of the inactive menu link label.
Font Size	Use to set the font size of the inactive menu link label.	From the **Font Size** dropdown, select the required font size of the inactive menu link label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the inactive menu link label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic
Font Color	Use to set the inactive menu link label color.	Specify the inactive menu link label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Field	Description	Value
Background Color	Use to specify the inactive menu link background color.	Specify the inactive menu link background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.

Menu Button

Field	Description	Value
Font Family	Use to set the font of the menu button label.	From the **Font Family** dropdown, select the required font of the menu button label.
Font Size	Use to set the font size of the menu button label.	From the **Font Size** dropdown, select the required font size of the menu button label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the menu button label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic

Field	Description	Value
Font Color	Use to set the menu button label color.	Specify the menu button label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Background Color	Use to specify the menu button background color.	Specify the menu button background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Border Width	Use to specify the menu button border width.	From the **Border Width** dropdown, select the required menu button border width. It ranges from 0 to 11 px.
Border Radius	Use to specify the menu button border-radius.	From the **Border Radius** dropdown, select the required menu button border-radius. It ranges from 0 to 15 px.
Border Color	Use to specify the menu button border color.	Specify the menu button border color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the menu and the left boundary of the design canvas.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 200 px.
Spacing Right	Use to provide the required amount of space between the menu and the right boundary of the design canvas.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 200 px.
Spacing Top	Use to provide the required amount of space between the menu and the top boundary of the design canvas.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 200 px.
Spacing Bottom	Use to provide the required amount of space between the menu and the bottom boundary of the design canvas.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 200 px.

Adding Report field

The report field enables the integration of a report designed using NewgenONE Report Designer into your portal or form. This feature is valuable for presenting comprehensive information, whether in a summarized or detailed format, concerning various ongoing business activities within the organization.

To add a report to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Advance category, select **Report** and drag and drop it on the design canvas. The report field gets added to the canvas and the Quick Properties – Report dialog appears.
   It displays the following report properties:
   - **Choose Report** — Click the ellipsis icon ••• and select a report available within the signed-in cabinet.
   - **Visible** — Turn on this toggle to display the report in the form or portal.
   - Click **View all** to view the complete list of report field properties. For detailed information on configuring report field properties, refer to the Configuring Report field properties section.
4. Click **Done** to save changes made to the report field properties.
5. Save the form or portal.

Click the report area to view the following options:

Option	Description
Move	Use to move the report field to a different column within the same section.
Settings	Use to open the Properties tab of the report field.
Copy	Use to create a copy of the report field.
Download	Use to save the report as a JSON file to your computer.
Delete	Use to delete the report field.

Configuring Report field properties

To access the properties tab for a Report field, you can use one of the following options:

- In the Quick Properties - Report dialog, click **View all**.
- Select the report field on the canvas and then click the gear icon appearing on its boundary.
- Select the report field on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Report field:

Basic

Field	Description	Value
Choose Chart Type	Use to select a report available within the signed-in cabinet and display it in the form or portal.	To add a report to the form or portal, follow the below steps: 1. In the **Choose Chart Type** field, click the ellipsis icon ... or simply click **+ Add Report** on the design canvas. The Select Reports dialog appears, displaying a list of available reports. 2. Select the required report from the list and then click **Select**. The selected report appears on the design canvas. You can use the dropdown menu to filter the report list based on various categories. Also, you can use the search box to search the report by its name.
Visible	Use to specify whether the report field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the report field is visible in the form.
Height	Use to specify the report field height.	In the **Height** box, specify the required report field height in pixels.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the report field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the report field visible on mobile devices.
On Tabs	Use to specify whether or not the report field is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the report field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the report field and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the report field and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the report field and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the report field and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Adding Iframe field

An iframe is an HTML element that allows you to embed and display content from an external source or a different part of the same website within a specific section of a form or portal. Iframes are commonly used to embed videos, maps, external widgets, or other web content.

To add an iframe field to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Advance category, select **Iframe** and drag and drop it on the design canvas. The iframe field gets added to the canvas and the Quick Properties – IFRAME dialog appears.
   It displays the following iframe properties:
   - **Label** — Specify the iframe field name.
   - **User Defined ID** — Specify an ID that uniquely identifies the iframe field in the system.
   - **Source URL** — Specify the source URL for retrieving the information to display in the iframe.
   - **Visible** — Turn on this toggle to display the iframe field in the form or portal.
   - Click **View all** to view the complete list of iframe properties. For detailed information on configuring iframe properties, refer to the Configuring Iframe field properties section.
4. Click **Done** to save changes made to the iframe properties.
5. Save the form or portal.

Click the iframe field to view the following options:

Option	Description
Move	Use to move the iframe field to a different column within the same section.
Settings	Use to open the Properties tab of the iframe field.
Download	Use to save the iframe as a JSON file to your computer.
Delete	Use to delete the iframe field.

Configuring Iframe field properties

To access the properties tab for an Iframe field, you can use one of the following options:

- In the Quick Properties - IFRAME dialog, click **View all**.
- Select the iframe field on the canvas and then click the gear icon appearing on its boundary.
- Select the iframe field on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of an Iframe field:

Basic

Field	Description	Value
Label	Use to specify the iframe field name.	In the **Label** box, specify the iframe field name. For example, *Locate us*.
User Defined ID	Use to allocate a distinctive ID to the iframe field, making it uniquely identifiable within the system.	In the **User Defined ID** box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.
Visible	Use to specify whether the iframe field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the iframe field is visible in the form.
Full Screen View	Use to add an option to the iframe field that allows users to enlarge the iframe content and view it in full-screen mode.	Turn on the Full Screen View toggle to add an option that allows users to view the iframe content in full-screen mode.
Source URL	Use to specify the source URL for retrieving the iframe content.	In the **Source URL** box, specify the required iframe content source URL.
Height	Use to specify the iframe field height.	In the **Height** box, specify the required iframe field height in pixels.
Control Description	Use to provide a description of the iframe field.	In the **Control Description** box, specify a brief description of the iframe field.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the iframe is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the content visible on mobile devices.
On Tabs	Use to specify whether or not the iframe is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the content visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the iframe field and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the iframe field and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the iframe field and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the iframe field and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Adding Captcha field

Captcha is a security feature often used in forms and portals to differentiate between human users and automated bots. Its primary purpose is to prevent automated scripts or bots from submitting forms.

To add a captcha field to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Advance category, select **Captcha** and drag and drop it on the design canvas. The captcha field gets added to the canvas.
4. Save the form or portal.

Click the captcha field to view the following options:

Option	Description
Move	Use to move the captcha field to a different column within the same section.
Settings	Use to open the Properties tab of the captcha field.
Copy	Use to create a copy of the captcha field.
Delete	Use to delete the captcha field.

Configuring Captcha field properties

To access the properties tab for a Captcha field, you can use one of the following options:

- Select the captcha field on the canvas and then click the gear icon appearing on its boundary.
- Select the captcha field on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Captcha field:

Basic

Field	Description	Value
Label	Use to specify the captcha field name.	In the **Label** box, specify the captcha field name. For example, *Are you a robot?*.
Placeholder	Use to specify a hint or suggestion of the expected input value. This offers guidance to the end users about the type of information they must enter.	In the **Placeholder** box, specify a suggestion of the expected input value.
Set Retry Count	Use to limit the number of times a user can attempt to solve a captcha challenge.	In the **Set Retry Count** box, specify the number of times a user can attempt to solve a captcha.

Style

Field	Description	Value
Font Family	Use to set the font of the captcha field label.	From the **Font Family** dropdown, select the required font of the captcha field label.
Font Size	Use to set the font size of the captcha field label.	From the **Font Size** dropdown, select the required font size of the captcha field label. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the captcha field label.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Light • Light Italic • Regular • Regular Italic • Semibold • Semibold Italic • Bold • Bold Italic

Field	Description	Value
Font Color	Use to set the color of the captcha field label.	Specify the captcha field label color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the captcha field is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the captcha field visible on mobile devices.
On Tabs	Use to specify whether or not the captcha field is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the captcha field visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the captcha field and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the captcha field and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the captcha field and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the captcha field and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Adding Survey field

A survey allows you to gather information or opinions from end users, often in a structured and standardized format. It is a common method for collecting data in various fields, such as marketing, healthcare, and customer feedback. For example, for a *Home Loan Application* portal, you can add a *Customer Satisfaction Survey*.

To add a survey to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane. The complete list of controls appears.
3. In the Advance category, select **Survey** and drag and drop it on the design canvas. The survey field gets added to the canvas.
4. Click **Select Survey**. The Select Survey dialog appears. It displays a list of surveys available within the signed-in cabinet.
5. Select the required survey and click **Select**. The selected survey appears in the field.
6. Save the form or portal.

Click the survey field to view the following options:

Option	Description
Move	Use to move the survey field to a different column within the same section.
Settings	Use to open the Properties tab of the survey field.
Download	Use to save the survey as a JSON file to your computer.
Delete	Use to delete the survey field.

Related topic(s)

Creating and managing surveys

Configuring Survey field properties

To access the properties tab for a survey field, you can use one of the following options:

- Select the survey field on the canvas and then click the gear icon appearing on its boundary.
- Select the survey field on the canvas and then click the gear icon present alongside the Preview button in the upper-right corner.

The following tables provide information on how to configure the various properties of a Survey field:

Basic

Field	Description	Value
Label	Use to specify the survey field name.	In the **Label** box, specify the survey field name. For example, *Customer Satisfaction Survey*.
User Defined ID	Use to allocate a distinctive ID to the survey field, making it uniquely identifiable within the system.	In the **User Defined ID** box, specify an ID that consists of alphanumeric, alphabetical, or numeric characters.
Visible	Use to specify whether the survey field must be visible or hidden in the form.	Turn on the **Visible** toggle to ensure the survey field is visible in the form.
Full Screen View	Use to add an option to the survey that allows users to enlarge the survey and view it in full-screen mode.	Turn on the Full Screen View toggle to add an option that allows users to view the survey in full-screen mode.
Source URL	Use to specify the source URL for retrieving the survey.	In the **Source URL** box, specify the required survey source URL.
Height	Use to specify the survey field height.	In the **Height** box, specify the required survey field height in pixels.
Control Description	Use to provide a description of the survey field.	In the **Control Description** box, specify a brief description of the survey field.

Display

Field	Description	Value
On Mobile	Use to specify whether or not the survey is visible when the form is viewed on mobile devices.	Turn on the **On Mobile** toggle to make the survey visible on mobile devices.
On Tabs	Use to specify whether or not the survey is visible when the form is viewed on tablet devices.	Turn on the **On Tabs** toggle to make the survey visible on tablet devices.

Spacing

Field	Description	Value
Spacing Left	Use to provide the required amount of space between the survey field and the left boundary of the column.	From the **Spacing Left** dropdown, select the required left spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Right	Use to provide the required amount of space between the survey field and the right boundary of the column.	From the **Spacing Right** dropdown, select the required right spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Top	Use to provide the required amount of space between the survey field and the top boundary of the column.	From the **Spacing Top** dropdown, select the required top spacing. You can also enter the value manually. It ranges from 0 to 60 px.
Spacing Bottom	Use to provide the required amount of space between the survey field and the bottom boundary of the column.	From the **Spacing Bottom** dropdown, select the required bottom spacing. You can also enter the value manually. It ranges from 0 to 60 px.

Adding custom control

Custom controls are custom-designed interface elements or widgets that serve specific purposes and enhance the user experience. These custom controls are used in forms or portals to collect data or perform specific actions.

To create and add custom controls to the form or portal, follow the below steps:

1. Open the required form or portal. The form builder page appears.
2. Click **Controls** in the left pane.
3. Click **+ Add Custom Control**. The Custom Control dialog appears.
4. In the **Custom Control Name** field, specify the custom control name.
5. In the **Control Icon** field, click the pin icon. The Open dialog appears.
6. Select the required icon image from your computer and click **Open**.
7. Click **Add**. The control gets added to the list.
8. In the **Properties** section, click **+ Add Property**.
9. Under the **Property Name** column, specify the control property name.
10. Under the **Property Value** column, specify the property value against the name specified in the previous step.
    Follow steps 8 to 10 to specify more properties for the control.
    Click the cross icon to remove the added property.
11. Click **Save**. The custom control gets created.
12. Select the created custom control from the left pane and drag and drop it on the design canvas.
13. Save the form or portal.

Click the control area on the form to view the following options:

Option	Description
Move	Use to move the custom control to a different column within the same section.
Delete	Use to delete the custom control from the form or portal.

Configuring events with controls

The event configuration feature enables you to register multiple types of event triggers on various form controls and perform actions such as save workitem, complete workitem, auto-populate data on workitem, database linking, trigger custom functions, and more. This allows you to create functionally complex portals and forms easily.

You can configure events on the following type of controls:

- Text Box
- Text Area
- Rich Text Input Box
- Date Picker
- Slider
- Multiselect
- Dropdown
- Radio Button
- Checkbox
- Toggle Switch
- Tile
- Picklist
- Button
- Document List
- Image
- Section

You can configure events at the Form and Section levels.

Refer to the below table for information on the availability of events with the mentioned controls:

Control name	Available events
Text Box	• Keydown • On Focus • On lost Focus • On Change • KeyPress[F1] • KeyPress[F2] • KeyPress[F3] • KeyPress[F4]
Text Area	• Keydown • On Focus • On lost Focus • On Change • KeyPress[F1] • KeyPress[F2] • KeyPress[F3] • KeyPress[F4]
Rich Text Input Area	• Keydown • On Focus • On lost Focus • On Change • KeyPress[F1] • KeyPress[F2] • KeyPress[F3] • KeyPress[F4]
Date Picker	• On Focus • On lost Focus • On Change
Slider	On Change
Mutliselect	• On Focus • On Change
Dropdown	• On Focus • On Change
Radio Button	On Click

Control name	Available events
Checkbox	On Click
Toggle Switch	On Click
Tile	On Click
Picklist	On Change
Button	On Click
Doc List	• On Upload • On Remove
Image	On Click
Section	On Load
Iframe	On Load

Refer to the below table for information on different commands that can be configured with the available events:

Available events	Commands	Description
On Click	WFRefreshInterfaces	Use to refresh the workitem.
On Change		
On Focus		
On lost Focus		
Click	WFSave	Use to save the current workitem.
Click	WFDone	Use to complete the current workitem.
Click	NGExportToPDF	Use to export the current form associated with the workitem to PDF.
Click	NGLaunchURL	Use to launch any third-party URL.
KeyDown	AutoComplete	Use to enable the auto-complete feature in the corresponding control.
KeyPress(F3)	GetPickList	Use to display data as a picklist in a control. You can get this data by simply writing a query and can also define a batch size.

Configuring commands

This section outlines the steps required to associate commands with controls and configure specific command actions.

To associate a command with a control, follow the below steps:

1. Open the settings or properties section for the required control.
2. In the Events section, click the add icon present next to the required event. The event configuration pane appears.
3. Click **+Command**. The Command section appears.
4. From the **Choose Command** dropdown, select any of the following commands:
    - CreateWorkitem
    - RouteCriteria
    - RouteJourney
    - NGExportToPDF
    - NGLaunchURL
    - OpenTransaction
    - CreateTransaction
    - ValidationOTP

    The *NGExportTOPDF*, and *NGLaunchURL* commands apply to both processes and portals while the remaining commands apply only to the portals.
5. Click **Done** to save the configuration and close the event configuration pane.
6. Save the form or portal.

Configuring CreateWorkitem command

Use this command to configure a button event within the portal to trigger the creation of a workitem.

To create a work item, the portal must be in deployed mode.

To configure the *CreateWorkitem* command, perform the following steps:

1. Select the **CreateWorkitem** command from the dropdown menu.
2. In the Process Mapping section, select the Process Name from the dropdown menu.
3. Click **Select**. The selected process appears in a tabular form with its queue name.
4. Select the **Queue Name** from the dropdown menu.
5. Select the **Map Process Variable**. Map process variable dialogue appears.
6. Map the portal variables with the process variables as follows:
    a. Click the **Variable Mapping** tab. This tab opens, by default.
    b. Under the variable column mapping, choose any one of the following:
        - All
        - Queue Variables
        - External variable
    c. Select the required **Portal Data Objects**, **Data Elements**, and **Process Elements** in their corresponding fields from the dropdown menu.
    d. Click the + to add more portal variables to map with the process vriables.
7. Map the required portal variables with the current process document as follows:
    a. Click the **Document Mapping** tab.
    b. Select the required **Process Doc Types**, Portal **Doc Table Name**, and **Doc Table Columns** from the dropdown menu.
    c. Click the + to add more process documents to map with the workitem.
8. In the Route Journey section, select the **Form Name** from the dropdown menu. This configures the button to open the specified form after creating the workitem.
9. Click **Save Changes** to save the defined configurations.

Configuring RouteCriteria command

Use the *RouteCriteria* command to configure a button to route users to a predefined form upon successful authentication.

The *RouteCriteria* command applies only to login-based portals.

To configure the *RouteCriteria* command, perform the following steps:

1. Select the **RouteCriteria** command from the dropdown menu. The following fields appear, select the required field from the dropdown menu:

Field	Description
FormName	Select the required target form to route users.
AuthenticationType	Select the required product for authentication.
Username	Specify the required text box for username entry.
Password	Specify the required text box for password entry.
CaptchaEnabled	Toggle to enable or disable the captcha.
CaptchaControl	Select the required captcha box from the dropdown menu.

2. Click **Done** to save the defined configuration.

Configuring RouteJourney command

Use this command to configure a button or tiles to route users to a predefined form.

To configure the *RouteJourney* command, perform the following steps:

1. Select the **RouteJourney** command from the dropdown menu. The following fields appear, select the required field from the dropdown menu:

Field	Description
TileName	Select the required tile to route users to.
FormName	Select the required to route users to.
DecisionFeild	Select the required text box used to specify the routing decisions. You can disable its visibility to end users through the text box's behavior configuration.

2. To configure the *RouteJourney* command on multiple tiles, perform the following steps:
    a. For each new tile, specify the required fields as described in the table above.

  b. Click **Add**. Configurations for the added tiles are listed under the Added Routes section.
  c. To configure multiple tiles, repeat steps 2(a) to 2(b).
3. Click **Done** to save the defined configuration.

Configuring NGExportTOPDF command

Use this command to configure a button to export a form as a PDF.

To configure the *NGExportTOPDF* command, perform the following steps:

1. Select the **NGExportTOPDF** command from the dropdown menu. You can select the delete icon to delete the command.
2. Click **Done** to save the defined configuration.

Configuring NGLaunchURL command

Use this command to configure a button to route the user to a predefined URL in a seperate window.

To configure the *NGLaunchURL* command, perform the following steps:

1. Select the **NGLaunchURL** command from the dropdown menu. The following fields appear, enter the required details in the corresponding field:

Field	Description
Url	Specify the required URL of the webpage, to route users to.
WindowName	Specify the title of the web page that you want to open in a separate window.

Field	Description
WindowDecoration	Specify the required window dimensions in the following format: height:[value]px;width:[value]px;left: [value]px;top:[value]px; For example: height:100px; width:70px; left:15px; top: 20px;

2. Click **Done** to save the defined configuration.

Configuring *OpenTransaction* command

Use the *OpenTransaction* command to configure a button to fetch the required transactions.

To configure the *OpenTransaction* command, set the required value for the tags in the *iforms.ini* file. For detailed instructions on these configurations, refer to the *Interface Designer section* of the *NewgenONE 2024.2 Configuration Guide*.

To configure the *OpenTransaction* command, perform the following steps:

1. Select the *OpenTransaction* command from the dropdown menu. The following fields appear, select the required field from the dropdown menu:

Field	Description
NextFormName	Select the required form to route users to.
TransactionSelectionControl	Select the required table where the transactions are mentioned.
TransactionColumnName	Specify the required TransactionColumnName.
MDMTable	Select any of the following options: • **YES**: Select to populate the data from the MDM table. • **NO**: Select to populate the data from the third-party table.

Field	Description
ISWidget	Select any of the following options: • **YES**: Select to route the user to a subform. • **NO**: Select to route the user to a page.
DynamicJourney	Toggle to enable or disable the dynamic route journey. If DynamicJourney is disabled, the next form gets rendered with the configuration specified by the tag *nextformname*.
RouteJourneyColumnName	Select the table column that contains the route journey's form. The RouteJourneyColumnName field appears only if DynamicJourney is enabled.
NavigationFormColumnName	Select the table column that contains the route journey's navigation form. The NavigationFormColumnName field appears only if DynamicJourney is enabled.

2. Create a table on the page where you want to show the transactions, with columns for referencekey and stage.
3. Configure the **+DB Linking** for the page using the following steps:
    a. Click the properties icon to open the properties section for the required page.
    b. In the Events section, click the add icon present next to the **On Load** event. The event configuration pane appears.
    c. Click **+DB Linking**. The DB Linking section appears.
    d. In the **Query** field, enter the query to populate the required columns data from the portal parent table.
    e. From the **Target Controls** field, select the required table control from the dropdown menu.
    f. Turn on the **Caching** toggle, to enable the temporary saving of cache data.
    g. Click **Done** to save the defined configuration and close the event configuration.
4. Click **Done** to save the defined configuration.

Configuring *CreateTransaction* command

Use the *CreateTransaction* command to configure a button to create the required transactions from scratch.

To configure the *CreateTransaction* command, set the value for the required tags in the iforms.ini file. For detailed instructions on these configurations, refer to the *Interface Designer* section of the *NewgenONE 2024.2 Configuration Guide*.

To configure the *CreateTransaction* command, perform the following steps:

1. Select the **CreateTransaction** command from the dropdown menu.
   The FormName field appears.
2. Select the form from the dropdown menu to route users to.
3. Click **Done** to save the defined configuration.

Configuring *ValidateOTP* command

Use the *ValidateOTP* command to configure a button to route users to a predefined form upon successful One Time Password (OTP) validation.

To configure the *ValidateOTP* command, set the value for the required tags in iforms.ini file. For detailed instructions on these configurations, refer to the *Interface Designer* section of the *NewgenONE 2024.2 Configuration Guide*.

To configure the *ValidateOTP* command, perform the following steps:

1. Select the *ValidateOTP* command from the dropdown menu. The following fields appear, select the required field from the dropdown.

Field	Description
FormName	Specify the form to route users to.
OTPField	Select the text box for entering the OTP.

2. Click **Done** to save the defined configuration.

Configuring database links

Configuring database links with form controls typically involves connecting the form, to a database in a way that allows users to interact with the database using form elements. This feature allows end users to enter data into a form and then store or retrieve that data from a database.

To link a database with a control, follow the below steps:

1. Open the settings or properties section for the required control.
2. In the Events section, click the add icon present next to the required event. The event configuration pane appears.
3. Click **+DB Linking**. The DB Linking section appears.
4. In the **Query** field, enter the required database query to link with the control. For example, specify an *Employee Details* database query.
5. From the **Target Controls** field, select the required target controls.
6. Turn on the **Caching** toggle, to enable the temporary saving of cache data.
7. Click **Done** to save the defined configuration and close the event configuration.
8. Save the form or portal.

Use the **+ Add Link** option to associate more databases with form or portal fields (controls).
Use the delete option to remove all the linked databases from the form or portal.

Configuring Custom Actions

Configuring custom actions with form controls typically involves setting up specific behaviors or functions that get triggered when end users interact with form elements on the form or portal. For example, while submitting a registration form when the end user clicks the *Submit* button, a custom action validates that the user has filled out all the required fields (name, email, password) and that the email format is valid.

To link a custom action with a control, follow the below steps:

1. Open the settings or properties section for the required control.
2. In the Events section, click the add icon present next to the required event. The event configuration pane appears.
3. Click **+Custom Action**. The Custom Action section appears.
4. In the **Method Name** field, specify the method name to execute the custom action. A method is a set of instructions that performs a specific custom action.
5. Click **Done** to save the defined configuration and close the event configuration.
6. Save the form.

Configuring Web Services

With web service integration, you can map multiple form controls with web service parameters. It enables the exchange of data with external systems on the form itself rather than in workflow on the execution of a defined event.

To link a web service with a control, follow the below steps:

1. Open the settings or properties section for the required control.
2. In the Events section, click the add icon present next to the required event. The event configuration pane appears.
3. Click **+Web Service**. The Web Service section appears.
4. In the **Web Service** field, select the required web service from the dropdown list. This list contains both the SOAP and REST web services as defined in Catalog Definition. For more information on Catalog Definition, refer to the *NewgenONE Process Designer User Guide*.

5. In the **Operations** field, select the required operation from the dropdown list. This dropdown list contains all the operation types and method names, selected during the web service creation.
6. In the **Time Out** field, specify the time-out period in seconds. A time-out period refers to the amount of time a system waits for a response from a web service before considering the request as failed.
7. In the **Input** field, click **Map Parameters** to map the web service with the parameters. The Input Parameter Mapping dialog appears.
8. Specify the **Request** and **Response** mapping parameters. Forward parameters are sent along with the call to the web service and reverse implies the parameters that are received with the result returned by the web service.
9. Click the required parameter and then click **Map**.
10. Click **Done**. The mapping gets saved.
11. Click **Done** to save the defined configuration and close the event configuration.
12. Save the form or portal.

Configuring Custom Services

Using custom services you can call third-party web services. This type of configuration involves sending input parameters and receiving output back from the web service.

To configure a custom service with a control, follow the below steps:

1. Open the settings or properties section for the required control.
2. In the Events section, click the add icon present next to the required event. The event configuration pane appears.
3. Click **+Custom Service**. The Custom Service section appears.
4. In the **Service Name** field, specify the name of the custom service.
5. In the **Input** field, click **Select Variables**. The Select Variable(s) pane appears.
6. Select the required variables.
   A complex variable typically contains multiple child nodes. For complex variables, select the child of the complex nodes.
   You can use the search box to search the variable by name.
7. Click **Done**.
8. In the **Output XML** field, click the **Upload XML** button to upload the file containing the output XML structure such that mapping can be done for the output.

> The output XML must have one parent field and the mapping starts with the child nodes. If the child node is a complex node then it must be mapped with a complex variable. If it is a simple node then it gets mapped with a primitive variable. Also, you have to map the parent as well as the child nodes. The output XML must not have an array of nodes, it must only contain the structure of the output XML.

9. In the **Output** field, click **Map Parameters**. The Output Parameter Mapping pane appears. Select the variable in both columns to map against each other.
   All the intermediate nodes between the parent and child must be mapped.
10. Click **Save & Exit** to save the mapping and close the pane.
11. Click **Done** to save the defined configuration and close the event configuration.
12. Save the form or portal.

Use the **+ Add Custom Service** option to configure more custom services with form or portal fields (controls).
Use the delete option to remove all the configured custom servcies from the form or portal.

Adding and managing pages and subforms

A page is a form canvas on which you drag and drop different controls such as text box, dropdown, picklist, and more to design the required form layout. A form can contain single or multiple pages depending on the business requirement.

For example, an application developer wants to create a form for a new user account creation for a social networking portal. Using the form builder, the developer can design a single-page form with the fields such as name, date of birth, gender, and more.

A subform is a secondary form linked to the primary form. A subform appears as an action or response to a click or selection of a particular option in the primary form.

In the Interfaces tab, click the **Page** button to view the complete list of pages and subforms. You can use the search box to search the page or subform by name.

This section includes the following topics:

- Creating pages

- Creating subforms
- Performing operations on pages and subforms

Creating pages

To create a page, follow the below steps:

1. Open the required portal.
2. In the Interface tab, click the **Page** dropdown. The Pages and Subforms section appears.
3. Click **Create Page**. The Create Page dialog appears.
4. In the **Page Title** field, specify the name of the page.
5. *(Optional)* Select the **Make this page as the Homepage of your Application** checkbox to set this page as the homepage.
6. Select from one of the following:
   - **System defined** — These page templates come preconfigured within the NewgenONE Interface Designer.
   - **User defined** — These page layouts are created by designers to precisely customize the look and arrangement of form pages based on unique business requirements.

   Alternatively, click **Create From Blank** to create a blank page and design it yourself. A blank page gets added to the form or portal.

7. Click **Create**. The page gets created and added to the form or portal.

When you create a new portal, a system-defined blank page appears by default. You cannot delete this page.

Creating subforms

To create a subform, follow the below steps:

1. Open the required portal.
2. In the Interface tab, click the **Page** dropdown. The Pages and Subforms section appears.
3. Click **Create Subform**. The Create Subform dialog appears.

4. In the **Page Title** field, specify the subform name.
5. Select from one of the following:
   - **System defined** — These subform templates come preconfigured within the NewgenONE Interface Designer.
   - **User defined** — These subform layouts are created by designers to precisely customize the look and arrangement of subforms based on unique business requirements.

   Alternatively, click **Create From Blank** to create a blank subform and design it yourself. A blank subform gets added to the form or portal.

6. Click **Create**. The subform gets created and added to the list.

Performing operations on pages and subforms

Move the mouse cursor over the name of a page or subform and click the ellipsis icon ···. The following options appear:

Option	Description
Preview	Use this option to generate a preview of the page or subform.
Rename	Use this option to rename the selected page or subform.
Set As Home	Use this option to set the selected page as the home page for the portal.
Duplicate	Use this option to create a duplicate of the selected page or subform.
Delete	Use this option to delete the selected page or subform.

Using templates

The Templates tab present in the left pane of the form builder canvas allows you to select a header, footer, or body template for designing a form. The templates can be system-defined and user-defined. The system-defined templates come pre-configured within the NewgenONE Interface Designer. While, user-defined templates are created by designers to precisely customize the look and arrangement of the form header, footer, and body based on unique business requirements.

Using a template, you can design a portal or form in a quick and error-free manner.

Select one of the following templates:

- **Header Templates** — The header templates provide the layout to add text, images, and more at the top of pages. The information added in the header gets inserted on each page of the application.
- **Footer Templates** — The footer templates provide the layout to add text, images, and more at the bottom of pages. The information added in the footer gets inserted on each page of the application.
- **Body Templates** — The body templates provide the layout to add the main body containing various form fields.

You can search the template by name.

Adding a template

To add a template to the form or portal, follow the below steps:

1. Open the required form or portal.
2. In the Interfaces tab, click **Templates** in the left pane. The list of system and user-defined templates appears.
3. Select the required template. Drag and drop it onto the design canvas.
4. Select the header, footer, or body templates and drag and drop it onto the form canvas. The template gets added to the page.
5. Save the form or portal.

Using common fields

Common fields are a collection of frequently used controls in the Interface Designer. This tab is available in the left pane of the form builder page. The available common fields are:

- Text Box
- Radio Button
- Dropdown
- Toggle Switch
- Button
- Image
- Section
- Tabs-Horizontal

You can use the search box to search the control by name.

Select the required control and drag and drop it onto the form canvas. Click the **Save** option present in the upper-right corner of the screen.

Defining data objects

You can define data objects in the NewgenONE Data Model Designer or directly from the form builder interface under the Data Objects tab. This step is essential to map form or portal fields with data object fields and store the data input by end users into the form or portal. For procedural details on how to create a data object, refer to the *NewgenONE Data Model Designer User Guide*.

Before you create a data object to map the form or portal fields, it is mandatory to create a parent data object.

Creating a parent data object

To create a parent data object, follow the below steps:

1. Create a parent data object with the below-mentioned data fields:

Fields	Data type
referencekey	String
stage	String
username	String
applicationname	String

2. In the Constraints tab, mark the data field "referencekey" as a Key Field.
3. Save the data object.

Creating portal data object

To create a data object to map the form or portal fields (child data object), follow the below steps:

1. Create a child data object with a string-type key field that acts as a foreign key to the parent data object.
2. Define data object relations (entity relationship) to link the primary key of the child data object with the primary key of the parent data object with the help of the foreign key association.

3. Save the data object.

Mapping portal data object fields with form or portal fields

To map the data fields available within the data object with the form or portal fields, follow the below steps:

1. Open the required portal.
2. On the form builder page, click **Data Objects** in the left pane. The list of portal data objects appears.
3. Select a data object from the list. Alternatively, click the add icon + to add a new data object using one of the following options:

Option	Description
Create Data Object	Use this option to create a new data object from scratch.
Copy available Data Object	Use this option to create a new data object by creating a copy of an existing one.
Upload from my computer	Use this option to create a new data object by uploading the data object definition from your local machine.
Import from Data Source	Use this option to import a data object from an external data source registered in the signed-in cabinet.

These options are also visible under the Data Model tab of the form builder page. For procedural details on using the above-mentioned options, refer to the *NewgenONE Data Model Designer User Guide*.

The created data object is now available under the Data Objects tab present in the left pane of the form builder page.

4. Map the form or portal controls with the data fields of the portal data objects. The mapping option is present in the properties dialog of every control. For procedural details, refer to the properties section of the required type of control. For example, to know how to map a text box field, refer to the Configuring Text Box properties section.
Alternatively, you can drag and drop the data objects or fields from the Data

Objects tab onto the design canvas.

The table below shows the conversion of data objects into controls on the canvas:

Data Object Type	Control type on Canvas
Array	List view
Nested array	Advanced list view
Static or basic Data Objects	Section with all child data types as columns with controls

- If the basic data object is used as the parent and its child is an array data object, a section is created, and within that section, a list view is generated.
- If the basic data object is the parent and its child is an array data object that has further child data objects, a section is created, and within that section advanced list view gets generated.

The table below shows the conversion of data fields into controls on the canvas:

Data Type	Control on Canvas
Boolean	Radio button
Short date	Date picker (date)
Date and time	Date picker (date and time)
Array	Multiselect
Nested array	Advanced list view
Static complex	Section with all child data types as columns with controls
Other	Text box

5. Save the form or portal.

Editing a data object

To edit the data object definition, follow the below steps:

1. Open the required portal or form. The form builder page specific to the portal appears.
2. Click **Data Objects** in the left pane. The list of available data objects appears.
3. Click the ellipsis icon ⁝ and select **Edit**. The data object definition appears.

4. Make the required changes.

> Making changes to the data object definition impacts the previously defined mapping.

5. Click **Save** to save the changes made to the data object.
6. Save the form or portal.

Delinking a data object

The delinking feature allows you to disassociate a data object from a portal or form without deleting the data object from the signed-in cabinet. After delinking, the data object becomes unavailable for mapping with the current portal.
Delinking a parent data object delinks all the child data objects automatically.

To delink a data object from a portal, follow the below steps:

1. Open the required form or portal. The form builder page specific to the portal appears.
2. Click **Data Objects** in the left pane. The list of available data objects appears.
3. Click the ellipsis icon ⋮ and select **De-link**. The data object disappears from the Data Object tab.
4. Save the form or portal. The data object delinks from the current portal.

Defining data object relations for array type controls

For array-type controls such as multiselect, picklist, table, list view, advance list view, and document list, it is mandatory to create a non-array type parent data object and portal data objects and then define the data object relation between the key fields of the parent and portal data object. For procedural details on how to create a data object, refer to the *NewgenONE Data Model Designer User Guide*.

Creating parent data object

To create a parent data object, follow the below steps:

1. Create a non-array parent data object with the below-mentioned data fields:

Fields	Data type
referencekey	String
insertionorderid	Long
docindex	String
doccomment	String
latitude	String
longitude	Long
doctype	String
docname	String
docsize	String
noofpageindoc	Long
doccontrolid	String

2. In the Constraints tab, mark the data field "insertionorderid" as a Key Field.
3. Save the data object.

Creating portal data object

To create a non-array data object to map the form or portal fields (child data object), follow the below steps:

1. Create a child data object with a string-type key field that acts as a foreign key to the parent data object.
2. Define data object relations (entity relationship) to link the primary key of the child data object with the primary key of the parent data object with the help of the foreign key association.
3. Save the data object.

Mapping portal data object fields with form or portal fields

To map the data fields available within the data object with the form or portal fields, follow the below steps:

1. Open the required portal.
2. On the form builder page, click data objects in the left pane. The list of portal data objects appears.
3. Select a data object from the list. Alternatively. click the add icon + to add a new data object using one of the following options:

Option	Description
Create Data Object	Use this option to create a new data object from scratch.
Copy available Data Object	Use this option to create a new data object by creating a copy of an existing one.
Upload from my computer	Use this option to create a new data object by uploading the data object definition from your local machine.
Import from Data Source	Use this option to import a data object from an external datasource registered in the signed-in cabinet.

These options are also visible under the Data Model tab of the form builder page. For procedural details on using the above-mentioned options, refer to the *Newgen Data Model Designer User Guide*.

The created data object is now available under the Data Objects tab present in the left pane of the form builder page.

4. Map the form or portal fields with the data fields of the portal data objects. The mapping option is present in the properties dialog of every control. For procedural details, refer to the properties section of the required type of control. For example, to know how to map a text box field, refer to the Configuring Text Box properties section.
   Alternatively, you can drag and drop the mapped data fields from the Data Objects tab onto the design canvas.
5. Save the form or portal. The form or portal fields get mapped to the data fields of the portal data objects.

Defining dynamic picklist data objects

Use picklists within a form or an application to make it easy for users to fill in the values from a set of predefined options. For example, you can create a picklist named Country Name to allow the users to select the country they belong to in a form or application.

In Interface Designer, a picklist data object provides a set of options for users to select an item. This picklist data object is dynamic. A dynamic picklist data object contains dynamic options that change based on the user input and external factors. For example, the options in the province or state list can vary depending on the user's chosen country.

The picklist data objects you create are available at the cabinet level and can further use them in the Rule Builder, Interface Designer, and Workspace. With Interface Designer, you can create picklists from scratch or seamlessly import them.

This chapter includes the following topics:

- Creating a dynamic picklist data object from scratch
- Importing a dynamic picklist data object
- Associating output fields with picklist variables

- Applying a filter on picklist variable

Creating a dynamic picklist data object from scratch

This topic explains how to create a new dynamic picklist from scratch. Creating from scratch means you create a picklist data object without importing it from an external source. It involves defining data fields, constraints, functions, and data source mapping for the picklist.

To create a dynamic picklist data object from scratch, perform the following steps:

1. In the form designer, select the picklist control from the design canvas.
2. Click the **Settings** icon to open the picklist properties.
3. Click the ellipsis icon ••• next to the Associate Picklist Data Object field. The Data Object Picklist Integration dialog appears.
4. Click **Create Picklist** to add a new picklist, and select **Create from Scratch** from the list. The Create Picklist Data Object dialog appears.
5. Enter the following information in the dialog:

Field	Description
Name	Enter the name of the picklist data object.
Object ID	It is a system-generated object ID that uniquely identifies the picklist data object in the database. You can also modify the ID at the time of object creation.
Description	Enter the description of the picklist data object if any.
Picklist Type	This field is set to Dynamic by default. The value of Picklist Type field is unchangeable.

6. Click **Create**. A new page appears. Here, you can perform the following operations:
    - Defining data fields
    - Defining constraints
    - Applying functions
    - Mapping data sources

> You can define the mapping for the picklist data object using the NewgenONE Data Model Designer. For more information, see the **Creating and managing picklist data objects** chapter in NewgenONE 2024.1 Data Model Designer.

Related topic(s)

- Defining data fields
- Defining constraints
- Applying functions
- Mapping data sources
- Setting default sorting
- Modifying a picklist data object

Defining data fields

A data field in a data object, also known as a database column, is the smallest entity for storing specific information in the data object. Each data field has a unique name and a defined data type. For example, the CountryName field of string data type stores textual information like the United States, Canada, United Kingdom, India, and others. Similarly, the Population field of integer data type contains numeric data.

You can add data fields in the Data Fields tab. Here, you can define the data field and variable names along with their data types. A data field is a part of the database structure that stores specific types of data. However, a variable name is a basic unit for storing and manipulating data in programs.

To add a data field to a data object, follow the below steps:

1. Go to the **Data Fields** tab.
2. Enter the name of the variable under the Variable Name column.
3. Select the data type of the variable. It can be an integer, string, long, float, date and time, currency, Boolean, shortdate, phone number, and email.
4. Enter the data field name of the variable. By default, it is prefilled with the variable name value.

5. Click **More Properties** to determine data type settings for the chosen data field. These properties vary depending on the data types. For more information, see Configuring data field properties.
6. Click **Data Field**. The data field gets added. You can perform the following operations on the added data field:
    - To modify the data type settings of the variable, click the **More Properties** icon ⚙.
    - To remove the added data field, click the **More Options** icon •••. and then select **Delete**.
    - To remove multiple data fields, select the checkbox next to the Variable Name column and then click **Delete**.
    - To change the sequence of added data fields, drag and drop the required data field to the desired location.

   Additionally, you can add more data fields by clicking **Data Field**.

Configuring data field properties

To configure the properties of a data type, open the More Properties dialog. To open it, click the **More Properties** button next to the required data field.

In the More Properties dialog, you can set the advanced properties of the data type.

Tab	Description
BASIC DETAILS	**Description** Specify a description of the data field.
	Default Value Specify a default value of the data field. For example, you can set the default value of the Age variable to 18. In the case of Boolean data type, you can set the default value to either true or false. This field is applicable to integer, string, long, float, date and time, Boolean, shortdate, and email.
	Mandatory Select the **Mandatory** checkbox to mark the data field as mandatory to fill.
	Non-Modifiable Select the **Non-Modifiable** checkbox to restrict modification of data added to the data field.

Tab	Description
	Length/Precision Specify the maximum length of characters that can be stored in the data field. This field is applicable for string, float, currency, and email data types.
	Scale Specify the allowed number of decimal places. This field is applicable to float and currency data types.
	Select Currency Select the required currency type from the Select Currency dropdown. The end user must add the data based on the selected currency type. The available currency options are the Indian Rupee and the United States Dollar. This field is applicable to currency data type only.
	Select Country Code Select the required country code from the Country Code dropdown. The supported values are India (+91) and US (+1). This field is applicable to phone number data type.
	Allow Searching Select the **Allow Searching** checkbox to allow searching of data in the field. Upon selecting this option, a search bar appears along with the data field.
	Read Only Select the **Read-Only** checkbox to mark a column as read-only. Upon selecting this option, the system displays the selected field as read-only and restricts the addition of data to it.
	Hidden Select the **Hidden** checkbox to hide the data field.

Tab	Description
	Auto Generated Field Turn on the Auto Generated Field toggle to automatically generate and store a unique value in the data field. For every new record, the value gets automatically incremented. This field is applicable for string, integer, and long data types. For the string data type, you can specify a suffix, prefix, or both to customize the generated value as per your requirement. A preview of the generated value appears in the Output text box. For integer and long data types, select: • **Identity** — to generate a sequence of auto-incremented values specific to the current data object. • **Sequence** — to generate a sequence of auto-incremented values. This can be shared across data objects and data sources.
CONSTRAINTS	Here, you can apply constraints to the data fields such as key, unique, index, and not null. For more information on constraints, see Defining constraints.
PICKLIST DEFINITION	Picklist allows you to add multiple rows to the selected data field while adding data. Turn on the PICKLIST DEFINITION toggle to configure its properties.

	Select **Mode** as one of the following:
	• **Data Objects**:
	  ◦ Click the ellipsis icon to select the data object within a category.
	  ◦ Select the data field to be used as a label using the **Label** dropdown.
	  ◦ Select the field to be stored as a value using the **Value** dropdown.
	• **Custom**:
	  ◦ Specify the required value to print and click the save icon.
	• **Query**:
	  ◦ Enter the query in the given text box and click **Map fields**.

Tab	Description
	Input/output properties • Select the **Multiple Selection** checkbox to allow the selection of values in the picklist. You can also specify the multiple values users can select in the picklist. This option is only in the case of string data type. • Select the **Manually Editable** checkbox to allow the modification of the values stored in the data field manually.
MASKING & ENCRYPTION	Turn on the **MASKING & ENCRYPTION** toggle to configure the masking and encryption of the data in the field.
	Select Pattern Select the masking pattern for the data in the field using the **Select Pattern** dropdown. Select from the pre-defined masking patterns or select **Custom**.
	Data Length If you select a pre-defined masking pattern, the data length appears automatically. In the case of a custom pattern, you must specify the length of the data that gets masked or encrypted. Select the **Variable Length** checkbox to avoid specifying data length and allow masking of a variable length of data.
	Character Select the character style for masking the data. The available options are X and *.
	Pattern To specify a pattern, use one of the following options: • Select the number of characters you want to mask in the **Suffix** and **Prefix**. • Select the **Select the fields you want to mask** option to manually select the character positions you want to mask in the data. • Select the **Mask full length** checkbox to mask the complete data. When you select the **Variable Length** checkbox in the Data Length field, the Select the fields you want to mask does not appear.

Tab	Description
	Sample Input Enter the sample data in the **Sample Input** text box and click **Preview**.
	Sample Output Based on the properties selected for masking and encryption of the data, the sample output gets generated.

When you drag and drop the data fields or an entire data object from the Data Objects tab onto the design canvas, properties such as Input Validation, as well as attributes like Mandatory, Non-Modifiable, Allow Sorting, Read Only, and Hidden are automatically applied on form controls based on the definitions set in the Data Fields tab or Data Model Designer (DMD).

Related topic(s)

- Defining constraints
- Applying functions
- Mapping data sources
- Setting default sorting
- Modifying a picklist data object

Defining constraints

You can define constraints to add rules to the database columns. This helps to ensure the reliability and integrity of the data. By applying constraints, you can determine what type of data must be stored within a specific database column.

These are the different types of constraints on the data fields within a picklist data object:

- **Key field** — A key field constraint is applied to a column or a group of columns that acts as a unique identifier for each database row. A key field cannot have any null value. For example, you can set the employee ID data field as the key field. This is because employee ID is unique for each employee within an organization.

- **Not Null** — A not null constraint is applied to prevent null values within a database column. For example, when entering the delivery details, it is necessary to provide the location, or else the information remains incomplete.
- **Index** — An index constraint is applied to speed up the search performance within the database table. For example, fields such as employee name and email ID in an IT complaint form.
- **Unique Key** — A unique key is applied to a column that contains unique values. For example, the email address field in an event registration form.

To apply a constraint on the data field, follow the below steps:

1. Go to the **Constraints** tab.
2. Click the required constraint on the upper-right section of the tab. It can be a key field, unique, not null, and index. A dialog box appears displaying the list of data fields within the picklist data object.
3. From the list, select the required data field. You can also use the search bar to find a particular data field or apply filters to view the data fields of specific data types.
4. Click **Create**. The newly created constraint now appears in the constraints list along with its constraint ID. To view constraint details including the variable name, data type, and data field, click **Expand All**.
   Additionally, you can remove the added constraint by clicking its corresponding delete icon .

Applying functions

Use functions to apply filters on the created picklist data object. Following is the list of functions that NewgenONE Interface Designer offers you:

Function Name	Description
delete<picklistdataobjectname>	Deletes the data row as per the defined filter condition.
get<picklistdataobjectname>	Gets the specific data rows as per the defined filter condition.
modify<picklistdataobjectname>	Modifies the data row as per the defined filter condition.

You can use these functions and further specify the filter conditions by clicking the corresponding filter icon . In the Filter Conditions that appear, specify the filter condition using the following steps:

1. Select the **(** from the dropdown list.
2. From the **Field** dropdown, select the required data field. It lists all the data fields created for the picklist data object.
3. Select the operator type for the condition. It can be any of the following =, >, <, <=, >=, <>, and LIKE.
4. From the **Value** field, select the comparison value. It can be any static value or system-defined variable value. The available options are Specify Value, @SessionId, @UserName, @UserId, and @CabinetName.
5. Select the **)** from the dropdown list.
6. (Optional) From the **AND/OR** dropdown, select the required conditional operator. This is used in case you are adding multiple filter conditions. Then, click **Add Condition** and repeat the above steps to create another filter condition.
   To remove the added condition, click the corresponding delete icon .
7. Click **Apply**.

Related topic(s)

- Defining data fields
- Defining constraints
- Mapping data sources
- Setting default sorting
- Modifying a picklist data object

Mapping data sources

Data source mapping is a process of linking the data fields of the current data object with those in another physical table existing in the signed-in cabinet. This tab displays the basic details about the data fields in the data object created previously such as the variable name, data field name, its corresponding data type, and the physical table name where the data gets stored in the database.

By default, the **Automatic Creation** checkbox is selected. It then displays the variables with their defined data types and their physical location in the database that exists within the currently signed-in cabinet. However, you can map the data fields of the picklist data object with the required data objects available in the data sources existing in the current signed-in cabinet by clearing the **Automatic Creation** checkbox and then clicking the **Create from Scratch** button. The Create-Datasource mapping dialog appears containing three tabs — Basic Details, Select Data Field, and Mapping.

Mapping picklist data object with NewgenONE cabinet data object

To map the picklist data object with the NewgenONE cabinet data object, follow the below steps:

1. In the Basic Details tab of the Create – Datasource mapping dialog, In the Basic Details tab of the Create – Datasource mapping dialog, set the data source type you want to use for data object mapping — **NewgenONE Cabinet**.
   In this type of source, you can use the data objects available in the currently signed-in cabinet. A cabinet can contain multiple data objects.
2. Click **Next** to proceed further. You are then navigated to the Select Data Field tab of the dialog that displays the list of available data objects in the cabinet. Additionally, you can use the search box to find the data object by name.
3. Drag and drop the required tables to the empty canvas of the dialog. You can also use the search box to find specific columns in the table or click the delete icon to remove the table.
   By default, all the table columns appear selected.
4. Clear the columns in the table you do not require.
5. Click **Next** to proceed. You are then navigated to the Join Data Objects tab of the dialog. Here, you can join the tables using an SQL expression.

   This tab is only available in case you drop multiple tables.

6. Enter the SQL expression to join the tables. You can also click the Keywords, Operators, and Fields to add them to the SQL expression.
7. Click **Next** to proceed further. You are then navigated to the Mapping tab of the dialog. Here, you can map the columns of the chosen table(s) with the data fields present in the current picklist data object. This tab displays the available column names in the table along with their data types.

8. Select the data field from the dropdown list next to the required table column.
9. Repeat the above step to map other data fields of the picklist data object.
10. Select the **Mark as Primary** checkbox to mark the table as the primary source. This means the table acts as the primary source of data from where the data flows to the secondary tables during data processing.
11. Click **Save**. The mapping gets saved.
    To change the data source mapping, click **Modify Mapping**.
12. Click **Create Data Object**. The data object is now created and appears in the picklist list on the left.

Related topic(s)

- Modifying a picklist data object
- Associating output fields with picklist variables
- Applying a filter on picklist variable

Setting default sorting

Interface Designer allows you to specify the sorting order for the data field at the time of picklist creation. This helps to arrange the data in a meaningful order. For example, you can arrange the country names in ascending order to analyze the data effectively.

You can set default sorting only in the case of dynamic picklist data objects.

To set the the default sorting, follow the below steps:

1. On the upper-right section of the dialog, click **More Options** ••• and then select **Default Sorting**. The Default Sorting dialog appears.
2. Select the required data field based on which you want to apply the sorting.
3. Select the required sorting arrow to specify the default sorting.
    - Click the up arrow ↑ to sort the data in ascending order.
    - Click the down arrow ↓ to sort the data in descending order.
4. Click **Save**.

Related topic(s)

- Defining data fields
- Defining constraints
- Applying functions
- Mapping data sources
- Modifying a picklist data object

Modifying a picklist data object

Modify a picklist data object to change its name or description. You can modify a picklist data object only during its creation process.

To modify a picklist data object, follow the below steps:

1. When creating the picklist data object, click **Edit** next to the picklist name in the dialog. The Modify Picklist Data Object dialog appears.
2. Change the name, description, or both for the picklist data object.

   Fields such as Object ID and Picklist Type are non-modifiable.

3. Click **Modify**. The picklist data object is now modified.

Related topic(s)

- Associating output fields with picklist variables
- Applying a filter on picklist variable

Importing a dynamic picklist data object

NewgenONE Interface Designer enables you to create new picklist data objects by importing them in JSON format from your machine or a database.

This section covers the following topics:

- Importing using a JSON file
- Importing using a database

Importing using a JSON file

To import a picklist data object using a JSON file, follow the below steps:

1. In the form designer, select the picklist control from the design canvas.
2. Click the **Settings** icon to open the picklist properties.
3. Click the ellipsis icon ••• next to the Associate Picklist Data Object field. The Data Object Picklist Integration dialog appears.
4. Click **Create Picklist** and then select **Import Data Object** from the list. The Import Picklist Data Object dialog appears containing two tabs – Basic Details and Data Objects.
5. On the Basic Details tab, fill in the following information in the respective fields:

Field	Description
Import from	Set the importing method to File. By default, the File option is already selected.
Browse file	Click the **Browse File** button to select the required JSON file from your local machine and then click **Open**. You can also import multiple picklist data objects from a JSON file containing multiple object definitions.
Data objects	It displays the name of the picklist data object in the uploaded JSON file.

6. Click **Next** to proceed further.
   In case a data object of the same name is already present in the system, an alert message appears prompting you to provide a new name and ID for the picklist data object. Click **Next**.
   The Data Object tab appears that contains four subtabs such as Data Fields, Constraints, Data Object Relations, Functions, and Data Source Mapping. The textbox next to the Data Objects tab shows the name of the data object you are importing.

7. However, in the case of multiple picklist data objects, you can select the required picklist from the dropdown list.
8. You can perform the following operations in the Data Objects tab:
    - **Data Fields** — This tab displays the data fields with their data types in the picklist data object. Here, you can modify the name, object ID, and description of the picklist data object. You can also add new data fields or modify the existing ones by changing the variable name, data type, or data field. For more information, see Defining data fields.
    - **Constraint** — This tab displays the different constraints applied to the data fields in the picklist data object. Here, you can mark the required data field as the key field, unique key, not null, and index. For more information, see Defining constraints.
    - **Functions** — This tab displays the various functions applied to the imported picklist data object. Here, you can add new filter conditions and modify the existing functions of the imported data object. For more information, see Applying functions.
    - **Data Source Mapping** — This tab displays the mapping details of the table columns and data fields with their data types. Here, you can modify the existing mapping of the data object. For more information, see Mapping data sources.
9. Click **Import**. The data object gets imported and appears in the existing list of picklist data objects.

Related topic(s)

- Associating output fields with picklist variables
- Applying a filter on picklist variable

Importing using a database

To import a picklist data object using a database, follow the below steps:

1. In the form designer, select the picklist control from the design canvas.
2. Click the **Settings** icon ⚙ to open the picklist properties.

3. Click the ellipsis icon ••• next to the Associate Picklist Data Object field. The Data Object Picklist Integration dialog appears.
4. Click **Create Picklist** and then select **Import Data Object** from the list. The Import Picklist Data Object dialog appears containing two tabs – Basic Details and Data Objects.
5. On the Basic Details tab, enter the following information in the respective fields:

Field	Description
Import from	Set the importing method to Database.
Datasource	Set the data source type to **NewgenONE Cabinet**. With this type of data source, you can use the data objects available in the currently signed-in NewgenONE cabinet.
Name	Enter the name of the data object.
Description	Enter the description of the picklist data object, if any.
Object ID	It is a system-generated object ID that uniquely identifies the picklist data object in the database. You can also modify the ID at the time of object creation.

6. Click **Next** to proceed further. The Set Definition tab appears.
7. Drag and drop the required tables to the empty canvas of the dialog. You can also use the search box to find specific columns in the table or click the delete icon to remove the table.
   By default, all the table columns appear selected.
8. Clear the columns in the table you do not require.
9. Click **Next** to proceed. The Join Data Objects tab appears. Here, you can join the tables using an SQL expression.

   This tab is only available in case you drop multiple tables.

10. Enter the SQL expression to join the tables. You can also click the Keywords, Operators, and Fields to add them to the SQL expression.
11. Click **Next** to proceed further. The Data Fields tab appears. This tab displays the variable name with its corresponding type and data field.
    Here, you can modify the definition of the variable such as its name, type, or data field name. Additionally, you can add new fields or remove the existing ones. For more information, see Defining data fields

12. Click **Next**. The Constraints tab appears. Here, you can view the different constraints applied to the data fields in the picklist data object. For more information, see Defining constraints.
13. Click **Next**. The Datasource Mapping tab appears. It displays the mapping details of the picklist data object. For more information, see Mapping data sources.
14. Click **Import**. The data object gets imported and appears in the existing list of picklist data objects.

Related topic(s)

- Associating output fields with picklist variables
- Applying a filter on picklist variable

Applying a filter on picklist variable

After associating the output fields with the picklist variables, Interface Designer allows you to apply filter conditions on the picklist variables. Filters help to display only relevant options in the picklist. For example, in the case of a Language picklist, you can apply a filter condition to limit the options to display based on the user's residential area.

For more information on picklist variable association, see Associating output fields with picklist variables.

To define a filter condition for a picklist variable, follow the below steps:

1. In the Data Object Picklist Integration dialog, navigate to the **Input fields** tab. Here, you can define the filter conditions to apply to the picklist variables.
2. Click **Add Condition**.
3. Select the **(** from the dropdown list.
4. From the **Field** dropdown, select the required data field. It lists all the data fields created for the picklist data object.
5. Select the operator type for the condition. It can be any of the following =, >, <, <=, >=, <>, and LIKE.

6. From the **Value** field, select the comparison value. This comparison value can be a static value, portal data object value, or portal data object field value.
7. Select the **)** from the dropdown list.
8. (Optional) From the **AND/OR** dropdown, select the required conditional operator. This is used in case you are adding multiple filter conditions. Then, click **Add Condition** and repeat the above steps to create another filter condition.
   To remove the added condition, click the corresponding delete icon.
9. Click **Save**.

Associating output fields with picklist variables

After creating or importing the dynamic picklist data object, you can associate the output fields with the picklist variables. Here, output fields represent the portal data objects and their fields created in the current form or interface.

To associate the output fields with picklist variables, perform the following steps:

1. In the Data Object Picklist Integration dialog, choose the required picklist from the **Select Picklist** dropdown. A list of picklist variables appears under the Select Variables section.
2. From the list, select the required picklist variables you want to associate with the output fields. To select all the picklist variables in the list, select the **All** checkbox. You can also use the search box to search a picklist variable by its name.
   The chosen picklist variables appear on the right of the dialog.
3. Select the required output field you want to associate with the picklist variable from the **Map Field** dropdown list.
4. Select the **Hide variables** checkbox to exclude the variable in the output.
5. (Optional) To add conditions on the picklist variables, go to the **Input Fields** tab. For more information, see Applying a filter on picklist variable.
6. Click **Save**.

Related topic(s)

Applying a filter on picklist variable

Defining breakpoints

Interface Designer allows you to customize your form for viewing on different electronic devices such as laptops, tablets, and mobiles. You can also specify custom breakpoints to ensure compatibility with these devices.

The available options are:

- Laptop — Click to view how the form appears when opened on a laptop. This view appears by default.
- Tablet — Click to view how the form appears when opened on a tablet device.
- Mobile — Click to view how the form appears when opened on a mobile device.

Customizing system defined breakpoints

To customize system-defined breakpoints for a form or portal, follow the below steps:

1. Open the required form or portal.
2. In the Interfaces tab, click the ellipsis icon present with the breakpoints option.
3. Move the mouse cursor over the required breakpoint.
4. Click the edit icon .
5. Make the required changes to the breakpoints.
6. Click **Done**.
7. Save the form or portal.

> You cannot delete a system-defined breakpoint.

Add custom breakpoints

To add custom breakpoints, follow the below steps:

1. Open the required form or portal.
2. In the Interface tab, click the ellipsis icon ⋮ present with the breakpoints option.
3. Click **Add Breakpoints**. A new breakpoint gets added to the list.
4. Specify the required dimensions and click **Done**. The breakpoint gets added.
5. Save the form or portal.

Change form view for different devices

Use the dropdown present with the breakpoints option to change the width of the form to make it compatible with a different types of devices. The available device options are:

- Laptop
- Laptop Small
- iPad
- iPad Pro
- iPhone
- Samsung Galaxy

Configuring themes

Themes allow you to customize the look and feel of the portal or form. It creates consistency among different pages and subforms of a portal and makes it seem more professional and organized.

You can save the applied themes and use them later for other portals. Also, you can download the theme definition to your local machine in JSON format. Similarly, you can upload a theme definition from your computer and use it across the portals.

Configure basic themes

To configure basic properties of a form or portal, follow the below steps:

1. Click the paintbrush icon present in the upper-right corner of the form builder page to open the themes tab. It consists of namely, basic, advanced, and custom CSS tab.

   When you change individual control properties on a form, it overrides the theme settings. To edit the theme properties, click **Reset Individual Properties** in the note displayed on the Themes tab. This note appears only after you change individual properties of any control in the form.

2. Refer to the below table to configure the **Basic** properties of a theme:

Option	Description
Primary Color (Brand Color)	Use to edit the primary color of the form.
Color Palette	Displays the current color palette based on the selected primary color.
Generate New	Generates a new and different palette of colors.
Tab Selections	Use to change the display color of the selected tab.
Section Heading	Use to change the display color of the section heading.
Buttons	Use to change the color combinations of primary and secondary buttons.

Option	Description
Active States	Use to change the display color of the active state of the controls.
Inactive States	Use to change the display color of the inactive state of the controls.
Wizard Selection	Use to change the display color of the selected step in wizard.
Slide Bar	Use to change the color combination of the slider.
Active Text Bar	Use to change the color of the active or enabled text.
Inactive Text Bar	Use to change the color of the inactive or disabled text.
Background Color	Use to change the background color of the following form elements: • Page • Section • Tab • Wizard • Tile
Label Text Style	Use to change the font style and size of the label text. • Font Family • Text Sizes: Small, Medium, Regular, or Large
Spacing	
Default Spacing	To adjust the space between form fields, select from the following options: • Compressed • Compact • Regular • Expand • Spacious A snippet is provided alongside each option on the screen to illustrate how each option affects the appearance of the form fields.

Option	Description
Custom Spacing	Use to customize Section spacing and Control spacing.

2. Click:
   - **Save** — to save and apply the changes made to the basic themes.
   - **Reset** — to undo the changes made in the basic themes and restore default selections.
   - **Save as** — to save the currently configured properties as a theme. The Save Theme dialog appears. Specify the theme name and click **Save**.
     When you save it as a theme, you can use it in other forms and portals too.

Section spacing

Set the spacing between the form sections as follows:

- **Outer Padding** — Use this option to adjust the space surrounding the section. Select **Verticthe al Spacing** and **Horizontal Spacing** under the Outer Padding tab from the dropdown menu as needed. You can also enter the value manually.
- **Inner Padding** — Use this option to adjust the space surrounding the columns within the section. Select **Spacing Left**, **Spacing Right**, **Spacing Top**, and **Spacing Bottom** under the inner padding tab from the dropdown menu as needed. You can also enter the value manually.

  Enter values between 0 and 200 only.

Control spacing

Select **Spacing Left**, **Spacing Right**, **Spacing Top**, and **Spacing Bottom** under the control spacing tab from the dropdown menu as needed. You can also enter the value manually.

Enter values between 0 and 200 only.

Open the themes section, and the list of saved themes appears. Click **Change** to view the upload and download themes option.

Configure advanced themes

To configure the advanced properties of a theme, follow the below steps:

1. Click the paintbrush icon present in the upper-right corner of the form builder page to open the themes tab.
2. Go to the **Advanced** tab.
3. Refer to the below table to configure the advanced properties of a theme:
   Inputs

Option	Description
Input Layouts	Use to change the look and feel of the input type controls. Select the system-defined layout options for: • Text box • Radio • Checkbox • Toggle • Date Picker
Input Style	Use to change the style of input fields, label, and value.
	Inputs • **Date Separator** — Select the required separator for the date. The available options are "/", "-", and ".". • **Date Format or Date Time Format** — Selet the required date or date and time format. • **Label Value Alignment** — Select the alignment of the label with respect to value. • **Border Color** — Select the input field border color. • **Border Width** — Select the input field border width. • **Border Radius** — Select the input field border radius.
	Label • **Font Family** — Select the input field label font. • **Font Size** — Select the input field label font size. • **Font Weight** — Select the input field label font weight. • **Color** — Select the input field label font color.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td></td><td>Value
Font Family — Select the font of the value entered in input field.
Font Size — Select the size of font of the value entered in input field.
Font Weight — Select the weight of the value entered in input field.
Color — Select the color of font of the value entered in input field.</td></tr>
</table>

Button

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Button Type</td><td>Use to display the button as
Primary Button
Secondary Button
Text Button</td></tr>
<tr><td rowspan="3">Button Styles</td><td>Use to change the style of the primary button, secondary button, and text button.</td></tr>
<tr><td>Primary Button
Font Family — Select the font of the label of primary button.
Font Size — Select the size of the label of primary button.
Font Weight — Select the weight of the label of primary button.
Font Color — Select the color of the label of primary button.
Background Color — Select the color of the primary button.
Border Radius — Select the radius of the border of primary button.</td></tr>
<tr><td>Secondary Button
Font Family — Select the font of the label of secondary button.
Font Size — Select the size of the label of secondary button.
Font Weight — Select the weight of the label of secondary button.
Font Color — Select the color of the label of secondary button.
Border Color — Select the color of the border of secondary button.
Border Width — Select the width of the border of secondary button.
Border Radius — Select the radius of the border of secondary button.</td></tr>
</table>

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td></td><td>Text Button
Font Family — Select the font of the label of text button.
Font Size — Select the size of the label of text button.
Font Weight — Select the weight of the label of text button.
Font Color — Select the color of the label of text button.</td></tr>
</table>

Label

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Style</td><td>Use to change the style of the label.
Font Family — Select the font of the label.
Font Size — Select the size of the label.
Font Weight — Select the weight of the label.
Font Color — Select the color of the label.
Background Color — Select the color of the background of label.
Label Alignment — Select label alignment left, center or right.</td></tr>
</table>

Sections

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Sections Layout</td><td>Use to change the look and feel of the section (Select from the system-defined layout options)</td></tr>
<tr><td>Sections Style</td><td>Use to change the style of the section.
Font Family — Select the font of the label of sections.
Font Size — Select the size of the label of sections.
Font Weight — Select the weight of the label of sections.
Font Color — Select the color of the label of sections.
Header BG Color — Select the color of the background of the section header.
Background Color — Select the color of the sections background.
Border Color — Select the color of the border of sections.
Border Width — Select the width of the border of sections.
Border Radius — Select the radius of the border of sections.</td></tr>
</table>

Horizontal tabs

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Tabs Layouts</td><td>Use to change the look and feel of the horizontal tabs.</td></tr>
<tr><td rowspan="6">Tab Style</td><td>Use to change the style of the tab and the button.</td></tr>
<tr><td>Active Tab
Font Family — Select the font of the label of active tab.
Font Size — Select the size of the label of active tab.
Font Weight — Select the weight of the label of active.
Font Color — Select the color of the label of active tab.
Back Color — Select the color of the back of active tab.</td></tr>
<tr><td>Inactive Tab
Font Family — Select the font of the label of inactive tab.
Font Size — Select the size of the label of inactive tab.
Font Weight — Select the weight of the label of inactive tab.
Font Color — Select the color of the label of inactive tab.
Back Color — Select the color of the back of inactive tab.</td></tr>
<tr><td>Tab Appearance
Icon-Label Alignment — Select the alignment of the icon with respect to the label of the tab (Dropdown list)
Border Color — Select the color of the border of tab.
Border Width — Select the width of the border of tab.
Border Radius — Select the radius of the border of tab.</td></tr>
<tr><td>Next Button
Button Label — Enter the label or name of the button.
Background Color — Select the color of the background of Next button.
Font Family — Select the font of the label of Next button.
Font Color — Select the color of the label of Next button.
Font Size — Select the size of the label of Next button.
Font Weight — Select the weight of the label of Next button.</td></tr>
<tr><td>Save And Next Button
Button Label — Enter the label or name of the button.</td></tr>
</table>

Tables

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>Table Layouts</td><td>Use to change the look and feel of the tables (Select from the system-defined layout options)</td></tr>
<tr><td rowspan="3">Table Style</td><td>Use to change the style of the table.</td></tr>
<tr><td>Table Title
• Font Family — Select the font of the title of the table.
• Font Weight — Select the weight of the title of the table.
• Font Color — Select the color of the title of the table.
• Font Size — Select the size of the title of the table.
• Background Color — Select the color of the background of the title of table.</td></tr>
<tr><td>Table Column
• Font Family — Select the font of the text in the columns of the table.
• Font Weight — Select the weight of the font of text in the columns of the table.
• Font Size — Select the size of the font of text in the columns of the table.
• Text Alignment — Select the alignment of the text in the column of the table
• Font Color — Select the color of the font of text in columns of the table.</td></tr>
</table>

Option	Description
	Table Rows • **Font Family** — Select the font of the text in the rows of the table. • **Font Weight** — Select the weight of the font of text in the rows of the table. • **Font Size** — Select the size of the font of text in the rows of the table.. • **Text Alignment** — Select the alignment of the text in the rows of the table • **Font Color** — Select the color of the font of text in rows of the table. • **Box Color** — Select the color of the boxes or cells of the rows. • **Selected Row/Cell Color** — Select the color for the currently selected row or cell. • **Border Color** — Select the color of the border of boxes or cells of the rows. • **Hover Effect** — Enables or disables the display of information in rows of table when mouse is hovered.

Doc List

Option	Description
Doc Type Style	Document List Label • **Font Family** — Select the font of the label of the document list. • **Font Size** — Select the font size of the document list label. • **Font Color** — Select the font color of the document list label.
	Document Type Label • **Font Family** — Select the font of the label of the document type. • **Font Size** — Select the font size of the document type label. • **Font Color** — Select the font color of the document type label.

4. Click one of the following:
   - **Save** — to save and apply the changes made to the advanced themes.
   - **Reset** — to undo the changes made in the advanced themes and restore default selections.
   - **Save as** — to save the currently configured properties as a theme. The Save Theme dialog appears. Specify the theme name and click **Save**.
     When you save it as a theme, you can use it in other forms and portals too.

Using custom CSS

Cascading Style Sheets (CSS) is a stylesheet language used to define the presentation and layout of forms and portals in a markup language. It is a fundamental technology used to control the visual aspects of forms and portals, such as fonts, colors, spacing, and positioning of elements. To configure the theme of a form or portal using CSS, you can either import a CSS file or write the styles directly in the text area. You can use various CSS properties to control the appearance of form elements.

Additionally, you can change the styles of multiple form elements at once. This is useful for applying consistent styles across controls with similar attributes.

To import custom CSS, follow the below steps:

1. In the Themes section, click **Custom CSS**. The CSS code appears on the screen.
2. To import a CSS file from your computer, click **Import CSS**.
3. To add new CSS, enter the CSS in the text box using the following format:

    - To change the CSS of any individual element, enter the CSS in the following format:

      ```
      /* Select elements whose 'id' attribute starts with 'example' */
      [id^="example"] {
        /* Your styles here */
      }
      ```

      For example, to change the background color of a table with the ID "table5":

      ```
      [id^="table5"] { /* Your styles here */background-color: red !important;}
      ```

    - To change the CSS of all elements with the same attribute, enter the CSS in the following format:

      ```
      /* Select elements whose 'id' attribute starts with 'example' */
      [id^="example"] {
        /* Your styles here */
      }
      ```

      For example, to change the background color of all table controls:

```
[id^="table"] { /* Your styles here */background-color: red !important;}
```

4. Scroll and click:
   - **Save** — to save and apply the custom CSS to the entire application.
   - **Save as** — to save a copy of the current CSS file.

When you import a custom CSS and apply it to a portal, the themes get applied to all the pages within the portal.

Configuring properties

The Properties option is available at the upper-right corner of the form builder page. Use the properties option to view and edit various aspects such as behavior, layout, style, and more of the page and different controls added to the page. To view the properties of controls, refer to the Adding controls section.

Configuring page properties

The page properties pane allows you to view and edit the properties of the page currently open on the canvas.

To view and edit the page properties, follow the below steps:

1. Click any blank space on the canvas.
2. Click the Properties icon present next to the Themes option. The page properties section appears.
3. To set or change values of different properties of the page, follow the below tables:
   - **Basic Details**

Field	Description	Value
Page Template	Allows you to change the template of the portal or form. The name of the template in use appears in the text box below.	Click **Select Template** or **Replace** to change the existing template with another one. The Page Template dialog appears. Select the required template and click **Select**. For procedural details, refer to the Creating a page section.

- **Background Color**

Field	Description	Value
Background Color	Use to change the color of the background of page.	Specify the page or form color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Background Image	Use to add an image to the background of page.	• Select Background Image. • Click **Browse from system** or the attachment icon to choose an image from your computer.

- **Image Appearance**

Field	Description	Value
Original Size	Enables retaining the original size of the image.	• Select the **Original Size** radio button. • Select any of the following alignment as needed: ◦ Left align ◦ Centre align ◦ Right align ◦ Top align ◦ Bottom align
Fit Width-wise	The image is resized to fit the width of the page.	• Select the **Fit Width-wise** radio button. • Select any of the following alignment as needed: ◦ Left align ◦ Centre align ◦ Right align
Fit Height-wise	The image is resized to fit the height of the page.	• Select the **Fit Height-wise** radio button. • Select any of the following alignment as needed: ◦ Left align

Field	Description	Value
		◦ Centre align ◦ Right align
Gradient as Overlay to Image	The background image is overlaid with a color gradient.	Select the checkbox to provide gradient as overlay to image.

- **Form Configuration**

  This section includes following configuration options:

  Full page

  Select this radio button to make the page cover the entire screen, following configurations appear. Specify as needed:

Field	Description	Value
Fixed padding icon	Provides equal padding on all four sides (top, bottom, left, right).	Enter the value in pixels manually in the text box.
Variable padding icon	Use this option to provide different padding on all four sides (top, bottom, left, right).	Enter the value in pixels manually in the respective text box for all sides.

Custom Width and Height

Select this radio button to enable width and height options, following configurations appear. Specify as needed:

Field	Description	Value
Set Form Width	Use to specify the horizontal form alignment.	Select any one of the following alignment: • Left align • Centre align • Right align
Form Width	Use to specify the form width.	Enter the value in pixels manually.
Min. Form Width	Use to specify minimum form width.	Enter the value in pixels manually. By default the value is 300 px.

Field	Description	Value
Max Form Width (Optional)	Optionally, specify the maximum width of the form in pixels.	Enter the value in pixels manually in the text box.
Horizontal Padding	Use to specify the horizontal space around the form's width.	Enter the value in percentage manually.
Set Form Height	Use to specify the vertical form alignment.	Select any one of the following alignment: • Top align • Centre align
Fit the height to content	Use to allow the page to automatically adjust to accommodate the content within it.	Select the checkbox to fit the form's height to content.
Form Height	Use to allow the page to automatically adjust to accommodate the content within it.	Enter the value in percentage manually.
Vertical Padding	Use to specify the vertical space around the form's height.	Enter the value in percentage manually.

Form Background

Field	Description	Value
Background Color	Use to change the form's background color.	Specify the page or form color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

Field	Description	Value
Border Color	Use to change the form's border color.	Specify the page or form color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.

- **Events** — For procedural details, refer to the Configuring events with form controls section.

Defining zone

Zoning allows you to define a zone in an image for data extraction. The defined zones can then be associated with a text box, combo box, list box, list view box, option button, check box, date picker, textarea, and picklist of a form.

To define a zone, follow the below steps:

1. Go to the Forms tab from the navigation bar and open an existing form. By default, the form opens in the Interface tab.
2. Click the **Properties** icon. The Page & Form pane appears.
3. Click **Zones**. The Set Zoning dialog appears.
4. Drag and drop or click **Upload** to upload the required image. The uploaded image appears in the right pane.

   The supported image formats are JPG, PNG, and TIFF. You can upload an image size of up to 4 MB.

5. Select a specific area or field in the image. In the left pane, the details related to the selected area appear such as zone name and coordinate (Left, Top, Width, and Height) with respect to the page.
   You can edit these details as required by clicking in the respective field.
6. (Optional) Edit the required details and click **Modify** to apply the changes.

   You can edit and delete a zone by clicking the respective Edit icon and Delete icon against the zone.

7. Similarly, you can define multiple zones as per your requirement and then click **Save & Exit**. The dialog gets closed and zones are defined for the uploaded image.

> When modifying zone properties, re-upload the original image, as the one used during zone definition is not stored in the system.

Associating a zone

To associate the defined zone with a text box of a form, follow the below steps:

1. In the Interface tab, select a text box. The operation bar appears.
2. Select the **Setting** icon or click the **Properties** icon. The Textbox pane appears.
3. Click **Advance Properties**. The advanced property fields appear.
4. Click the **ZoneList** dropdown and choose the required zone to associate with the selected field.
5. Click **Save** at the top right corner of the screen. The message "Form Saved Successfully" appears.

Similarly, you can associate the defined zones with a combo box, list box, list view box, option button, check box, date picker, textarea, and picklist.

Creating control set

Control sets allow the execution of actions on a collection of controls, minimizing the need for extensive code. They provide a quicker means of adjusting the style of a set of controls. For example, when several controls need to become visible in response to a certain action, users can simply establish a control set rather than setting visibility for each control separately. This functionality is frequently utilized for configuring attributes across multiple controls using a unified API on the server side.

To create a control set, follow the below steps:

1. Go to the Forms tab from the navigation bar and open an existing form or portal. By default, the form opens in the Interfaces tab.
2. Click the **Properties** icon. The Page pane appears.
3. Click the **Control Sets** option. The Control Set-Navigation Page dialog appears.
4. Click the add icon +. A control set gets added to the list.
5. In the **Control Set Name** box, specify the name of the control set.

6. In the **Select Controls to add in control** set field, select the required controls. You can use the search box to search for the controls by name. The selected controls appear in the Define Control Set section.
7. Configure the actions to be performed on the selected controls. The available options are Visible, Enable, Mandatory, and Default Value.
   Similarly, you can create more control sets.
8. Click **Save** to create the control set and close the dialog.

Configuring subform properties

The subform properties pane allows you to view and edit the properties of the subform currently open on the canvas overlay screen.

To view and edit the subform properties, follow the steps below:

For List View or Advanced List View Subform

To view and edit the list view or advanced list view subform properties, follow the below steps:

1. Select the Listview or Advanced Listview control from the canvas.
2. Click the Properties icon present next to the Themes option. The page properties section appears.
3. Select **Data Addition**.
4. Select **Through Popup**. A subform appeas in an overlay screen.
5. Click the Properties icon present next to the Themes option. The subform properties section appears.
6. To set or change values of different properties of the page, follow the below tables:

Basic

Field	Description	Value
Title	Allows you to add the title of the page.	Enter the title in the text box.

Field	Description	Value
Upload Icon	Use to add an icon for the subform that represents its content and purpose.	To upload an icon for the form, click **Browse from system** or the attachment icon to choose an image from your computer.

Behaviour

Field	Description
Header	Turn ON the toggle to display the header.
Previous/Next button while Edit	Turn ON the toggle to display the Previous/Next button while edit.

Style

Field	Description	Value
Width	Use to change the width of the subform.	Enter the value in percentage manually.
Height	Use to change the height of the subform.	Enter the value in percentage manually.
Header		
Background Color	Use to change the background color of the header.	Specify the header background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Title	Specify the title.	Enter the title for the subform in the text box.
Font Family	Use to set the font of the hyperlinked text.	From the **Font Family** dropdown, select the required font for the header text.

Field	Description	Value
Font Size	Use to set the font size of the hyperlinked text.	From the **Font Size** dropdown, select the required font size of the header text. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the hyperlinked text.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Regular • Bold • Regular Italic
Font Color	Use to set the font color of the hyperlinked text.	Specify the header text font color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Footer		
Background Color	Use to specify the link of the background color.	Specify the subform background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.

Button Style

Option	Description
While Adding Row	Displays the primary button list, which appears when adding a row. You can rename the primary and secondary buttons in the provided input text box.

<table>
<tr><th>Option</th><th>Description</th></tr>
<tr><td>While Editing Row</td><td>Displays the primary button list, which appears when editing a row. You can rename the primary and secondary buttons in the provided input text box.</td></tr>
<tr><td rowspan="4">Button Styles</td><td>Use to change the style of the primary button, secondary button, and text button.</td></tr>
<tr><td>Primary Button
Font Family — Select the font of the label of primary button.
Font Size — Select the size of the label of primary button.
Font Weight — Select the weight of the label of primary button.
Font Color — Select the color of the label of primary button.
Background Color — Select the color of the primary button.
Border Color — Select the color of the border of primary button.
Border Width — Select the width of the border of primary button.
Border Radius — Select the radius of the border of primary button.</td></tr>
<tr><td>Secondary Button
Font Family — Select the font of the label of secondary button.
Font Size — Select the size of the label of secondary button.
Font Weight — Select the weight of the label of secondary button.
Font Color — Select the color of the label of secondary button.
Border Color — Select the color of the border of secondary button.
Border Width — Select the width of the border of secondary button.
Border Radius — Select the radius of the border of secondary button.</td></tr>
<tr><td>Text Button
Font Family — Select the font of the label of text button.
Font Size — Select the size of the label of text button.
Font Weight — Select the weight of the label of text button.
Font Color — Select the color of the label of text button.</td></tr>
</table>

Events — For procedural details, refer to the Configuring events with form controls section.

For Button Subform

To view and edit the button subform properties, follow the below steps:

1. Select the Button control from the canvas.

2. Click the Properties icon present next to the Themes option. The page properties section appears.
3. Click **Button Behavior**.
4. Click **Edit Subform**. A button subform appears in an overlay screen.
5. Click the Properties icon present next to the Themes option. The subform properties section appears.
6. To set or change values of different properties of the page, follow the below tables:

Basic

Field	Description	Value
Subform Title	Use to add the title of the subform.	Enter the title in the text box.
Upload Icon	Use to add an icon for the subform that represents its content and purpose.	To upload an icon for the form, click **Browse from system** or the attachment icon to choose an image from your computer.
Template	Allows you to change the template of the subform.	• Select **Page** or **Form** radio button as needed. • Click **Select Template** . The Page Template dialog appears. Select the required template and click **Select**. For procedural details, refer to the Creating a page section.

Subform Behaviour

Field	Description
Header	Turn ON the toggle to display the header.
Footer	Turn ON the toggle to display the footer.

Subform Style

Field	Description	Value
Width	Use to change the width of the subform.	Enter the value in percentage manually.
Height	Use to change the height of the subform.	Enter the value in percentage manually.
	Header	
Background Color	Use to change the background color of the header.	Specify the header background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Font Family	Use to set the font of the header text.	From the **Font Family** dropdown, select the required font for the header text.
Font Size	Use to set the font size of the header text.	From the **Font Size** dropdown, select the required font size of the header text. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the header text.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Regular • Bold • Regular Italic

Field	Description	Value
Font Color	Use to set the font color of the header text.	Specify the header text font color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and select the required color.
Footer		
Background Color	Use to change the background color of the footer.	Specify the footer background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon and pick the required color.
Font Family	Use to set the font of the button label text.	From the **Font Family** dropdown, select the required font for the button label text.
Font Size	Use to set the font size of the button label text.	From the **Font Size** dropdown, select the required font size of the header text. It ranges from 10 to 30 px.
Font Weight	Use to set the font weight of the button label text.	From the **Font Weight** dropdown, select the required font weight. The available options are: • Regular • Bold • Regular Italic

Field	Description	Value
Background Color	Use to change the background color of the button.	Specify the button background color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon ☐ and pick the required color.
Font Color	Use to set the font color of the button label text.	Specify the button label text font color using one of the following options: • Specify the hex code for the required color. • Click the color picker icon ☐ and select the required color.
Border Radius	Use to set the border radius of the button.	From the **Border Radius** dropdown, select the required border radius of the button.
Show Cancel Button	Use to display the Show Cancel Button.	Turn ON the toggle to display the Show Cancel Button.

Events — For procedural details, refer to the Configuring events with form controls section.

Undo and redo changes

The Undo and Redo options are available in the upper-right corner of the form builder page. Click:

- **Undo** ↺ — to undo or reverse a change you just made to the portal or form design.
- **Redo** ↻ — to redo or again make the change you just undid.

Generating preview

Use the Preview option to view beforehand how the portal or page looks and works. This option is present in the upper-right corner of the form builder page. Click:

- **Preview** — to generate a preview of the complete portal.
- **Page Preview** — to generate a preview of the currently opened page. This option is available in the dropdown list of the Preview option and is applicable for pages only.

Uploading a form

The Upload Form feature allows you to upload a form instead of designing one from scratch. It is useful to populate fields with existing data, reducing manual data entry and potential errors. It is time efficient and allows to maintain a consistent design ensuring a brand-consistent appearance.

To upload a form, follow the below steps:

1. In the Forms tab, select the required **Portal** or **Draft Process**. The forms listed within the selected portal or process appear.
2. In the Forms subtab, click **Upload**. The Upload Form dialog appears.
3. In the **Upload File** field, click the pin icon to select the form definition (ZIP file) from your local machine.
4. In the **Form Name** field, specify a name of the form.
5. Click **Save.** The form gets imported and listed within the portal.
   For more information on designing, refer to the Understanding form builder elements section.

Related topic(s)

- Creating a portal
- Understanding form builder elements
- Creating a form
- Creating a page
- Performing operations on pages and subforms

Creating a page

Pages allow you to divide longer or more complex forms or portals into multiple sections, each containing a subset of the form fields and information.

To create a page, follow the below steps:

1. In the Forms tab, click the dropdown present in the left pane and select **Portals**. The Portals section appears.
2. Select the required portal. The pages and forms listed within the selected portal appear.
3. In the Pages subtab, click **Create**. The Create Page dialog appears.
4. In the **Page Name** field, specify the name of the page.
5. Click **Create.** The page gets created and listed within the portal.
   For more information on designing, refer to the Understanding form builder elements section.

Related topic(s)

- Creating a portal
- Creating a form
- Understanding form builder elements
- Uploading a page
- Performing operations on pages and subforms
- Saving a portal
- Publishing a portal

Managing templates for portals, forms, and pages

Templates capability helps you in easy and faster development of portals. In similar use cases across the industry and region, the process remains the same, for example, the process for loan application or claim management remains the same in a similar region. So, the portals can be saved as templates and reused to avoid rework and encourage faster development.

The Templates tab displays the templates that can be used to build applications under different categories. The templates for Portals (applications), Pages, and Forms are available under this tab.

Related topic(s)

- Managing templates in categories
- Previewing a template
- Renaming a template
- Editing a template
- Deleting a template

Managing templates in categories

Interface Designer allows you to group the templates into various categories depending on their usage. You have the option to place a template in an existing category or create a new one for it.

In the Templates Categories pane, the number with the category name represents the total number of templates present within that category irrespective of the subcategory. Move the mouse cursor over the number to view the distribution of templates among subcategories that is portals, pages, and forms.

In the upper-right corner of the Templates tab, the following options are available:

- **Search box** — Use this option to search for templates by name.
- **Sort** — Use this option to sort the template list based on different criteria. The available criteria are:
    - *Sort Order* selected as *Ascending* and *Sort By* selected as:
        - **Name** — Sorts the templates in alphabetically ascending order by name.
        - **Last Modified** — Sort the templates based on the date and time of their most recent modification, with the template with the oldest modifications appearing at the top.
        - **Most Used** — Sort the templates based on their frequency of use, with rarely used templates appearing at the top.
    - *Sort Order* selected as *Descending* and *Sort By* selected as:
        - **Name** — Sorts the templates in alphabetically descending order by name.
        - **Last Modified** — Sort the templates based on the date and time of their most recent modification, with the templates with the most recent modifications appearing at the top.
        - **Most Used** — Sort the templates based on their frequency of use, with frequently used ones appearing at the top.
- **List view** — Use to display the available templates as a list.
- **Tile view** — Use to display the templates in a tile format.

Related topic(s)

- Creating a template category
- Editing a template category
- Deleting a template category

Creating a template category

To create a template category, follow the below steps:

1. Click the add icon present in the Template Categories section. The Create Category dialog appears.
2. In the **Category Name** field, specify the template category name.
3. In the **Description** field, specify a description of the template category.
4. Click **Create**. The category gets added to the category list.

Editing a template category

To edit a category of template, follow the below steps:

1. In the Template categories pane, click the ellipsis icon against the required category and select **Edit**. The Edit Template Category dialog appears.
2. Make the required changes.
3. Click **Save**.

You cannot edit a system-defined category.

Deleting a template category

To delete the category of a template, follow the below steps:

1. In the Template categories pane, click the ellipsis icon against the required category and select **Delete**. A dialog to confirm the deletion appears.

   When you delete a template category, it deletes all templates within that category.

2. Click **Confirm** to delete the selected template category.

> You cannot delete a system-defined template category.

Previewing a template

To preview a template, follow the below steps:

1. In the Template categories pane, select the required category. The portals, pages, and forms templates listed within it appear.
2. Click the ellipsis icon ⋮ against the required template and select **Preview**. A preview of the selected template appears.

Renaming a template

To rename a template, follow the below steps:

1. In the Template categories pane, select the required category. The portals, pages, and forms templates listed within it appear.
2. Click the ellipsis icon ⋮ against the required template and select **Rename**. The Rename Template dialog appears.
3. In the **Template Name** box, specify a new name for the template.
4. Click **Save**.

Editing a template

To edit a template, follow the below steps:

1. In the Template categories pane, select the required category. The portals, pages, and forms templates listed within it appear.
2. Click the ellipsis icon ⋮ against the required template and select **Edit**. The form builder page specific to the selected template appears.
3. Make the required changes and save the portal or form.

Deleting a template

To delete a template, follow the below steps:

1. In the Template categories pane, select the required category. The portals, pages, and forms templates listed within it appear.
2. Click the ellipsis icon ⋮ against the required template and select **Delete**. A dialog to confirm the deletion appears.
3. Click **Confirm** to delete the template.

Designing interface using NewgenONE Marvin

NewgenONE Marvin leverages generative AI to dynamically create UI elements based on specific user inputs at the page, section, and control levels. This feature facilitates the development of customized UIs that align with business requirements, simplifying the interface design process.

The Marvin feature is available only after it’s enabled at the cabinet level.

For example, in an organization's Accounts Payable department, NewgenONE Marvin can transform the invoice processing system. By providing the inputs in plain English, business user can create tailored UI elements at the page, section, and control levels, streamlining the interface to address specific needs. For instance, if a business user describes the need for a new section to track overdue invoices, NewgenONE Marvin generates the appropriate UI components and data objects, and it also maps the data field to the corresponding controls. This level of customization improves efficiency and accuracy, ensuring that the interface evolves seamlessly with the department’s changing requirements.

NewgenONE Marvin allows the designing of interfaces on the following levels:

- Designing pages
- Designing sections
- Designing controls

To generate page, section, and control level interfaces using NewgenONE Marvin, perform the following steps:

1. Click the **Create Portal** button.
2. Click **Create from scratch**. The portal creation screen appears.
3. From the **Name of Category** dropdown, select the portal category. Alternatively, click **+ Add New** to add a new portal category.
4. Specify the portal name.
5. Specify a portal description.

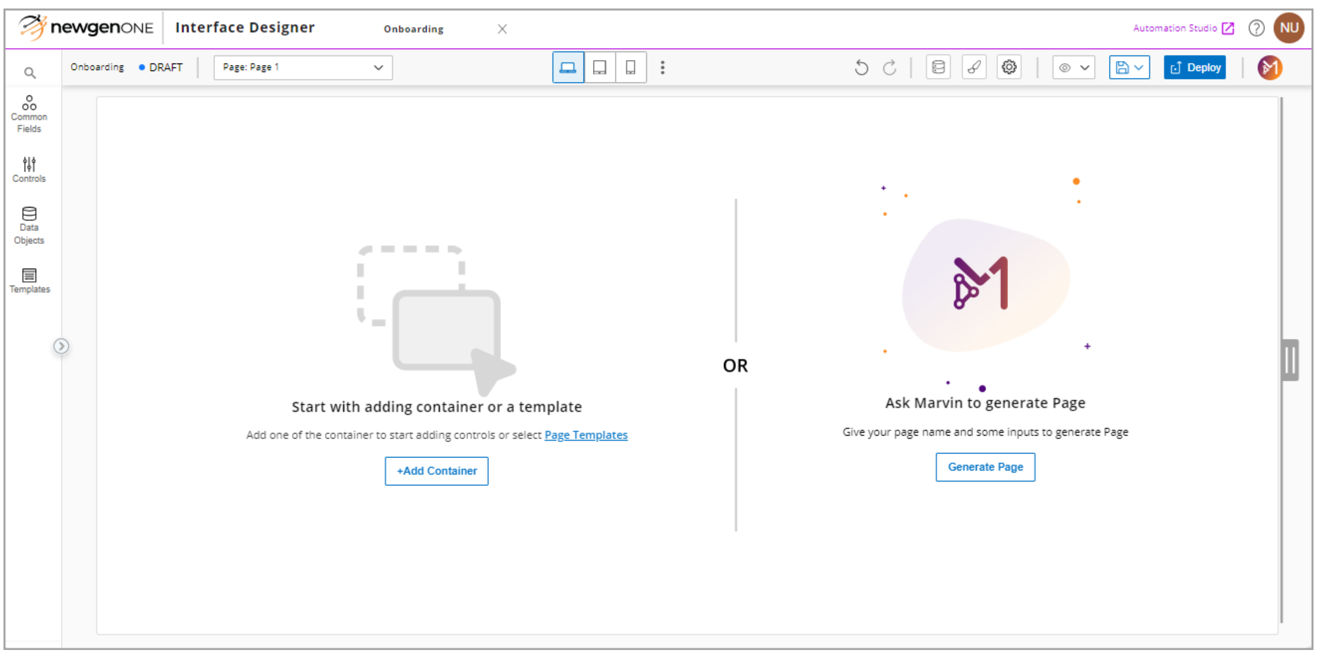
6. (Optional) Turn on the **Login free Portal** toggle to create a portal without a login page.

   A login-free portal does not require credentials to access restricted sites, pages, and forms.

   When you create a portal from scratch, the Blank Template appears selected in the Selected Template section.

   If you want to create a portal using a predefined template, click **Replace** and select the required predefined template from the template selection page. For more information, refer to the Creating a portal using a predefined template section.

7. Click **Create**. The created portal appears:



8. In the right pane, select the **Generate Page** button to generate the pages using Marvin.
9. In the Ask Marvin to generate page tab, enter the required information in the corresponding fields.
   Following is the list of fields along with their description associated with the Ask Marvin to generate page, section, and controls tab:

Field	Description
Page Name	Enter a clear and concise page name. For example, gold loans, personal loans, invoice approvals, and more.
Section Name	Enter a clear and concise section name. For example, applicant details, loan details, address details, income details, and more.
Control Name	Enter a clear and concise control name. For example, full name, date of birth, contact information, loan amount requested, and more.
Geography	Enter a suitable geographical location for the interface. Geography helps to design the interface workflow specific to that location or region. For example, Europe, North America, Asia, and others.

Field	Description
Input Validation	Select any of the following fields based on your needs: • **Regex** - Use this option to apply predefined regular expressions for input validation or pattern matching. For example, Use the regex pattern ^\d{10}$ to ensure the input is exactly 10 digits, the standard length for mobile phone numbers in India. • **Mandatory** - Use this option to designate inputs as required fields that must be completed. • **Sensitive** - Use this option for inputs that contain sensitive information; Marvin automatically encrypts these inputs for security.
Generate Data Objects	Toggle to create data objects along with UI components using Marvin.
Enable Marvin for Existing Fields	Toggle to allow Marvin to edit existing fields not created by Marvin.
Additional Comments (optional)	You can add additional comments to create a page, section, or control by either typing or using the microphone icon to speak your requirements. Once you've finished speaking, click the microphone icon again to stop the recording. Your recorded inputs appear in the Any Additional Comments field. To remove all inputs at once, click **Clear Input**. • The speech-to-text functionality is available only when accessing NewgenONE over a secure HTTPS network. • The speech-to-text functionality is only supported in English language.

10. To update any generated section, perform the following steps:
    a. Select the section and click the Marvin icon on the top right corner of the page. In the right pane, the Ask Marvin to generate section tab appears.
    b. Enter the required information in the corresponding fields.
    c. Select **Generate** to update the section.
11. To update any generated control, perform the following steps:
    a. Select the control and click the Marvin icon on the top right corner of the page. The Ask Marvin to Generate Control tab appears in the right pane.
    b. Enter the required information in the corresponding fields.
    c. Select **Generate** to update the control.

Viewing audit logs

Audit logs are chronological records of operations performed on the portals, forms, and surveys over a specific period. This feature enables you to monitor user activity and ensure data security. Audit logs record the occurrence of an operation, the name of the executioner, the time at which the operation occurred, a summary of the operation, and the impacted items.

The Audit Logs tab allows you to view audit logs based on the following criteria:

Field	Description
Date Range	Use this field to view the logs of operations performed on portals, forms, and surveys during a specific time period.
Action By	Use this field to view the logs of operations performed on portals, forms, and surveys by specific users.

You can use the date range and action by options separately, and in combination to generate the audit logs.

For example, Mark, an application development lead at an organization, is responsible for developing and managing portals for an insurance corporation. Using the audit logs feature, he can monitor the user activity on portals such as creation, modification, and more.

To view audit logs, follow the below steps:

1. In the Audit Logs tab, click the **Date Range** field. A dialog asking to select the required dates appears.
2. Using the **From** and **To** fields, select the required date range.
3. Click the **Action By** field. The Users dialog appears.
   The dialog displays a list of users available in the system.

   You can sort the list of users using one of the following options:

   • **Personal Name**— Sorts the list of users based on the first name of the user.
   • **User Name** — Sort the list of users based on the user name.

Alternatively, you can filter the list of users using one of the following options:

- **Group** — Filters the list of users based on the group of which they are members. For procedural details, refer to the Applying group filters section.
- **Expertise** — Filters the list of users based on the expertise of the user. For procedural details, refer to the Applying expertise filters section

You can use the search box to search the user by name.

4. In the Select User(s) section, select the required users.
   Alternatively, click **Select All** to select all the users available in the filtered list at once.
   The list of selected users appears in the Selected User(s) section.
5. Click **Ok**.
   Alternatively, select the **All Users** checkbox to generate the logs for operations performed by all the existing users of the system.
6. Click **Generate** to view the audit logs.

Applying group filters

You can filter the users' list based on the groups assigned to the users.

To apply the group filter, follow the below steps:

1. In the Users dialog, click the ellipsis icon ⋮ present with the group field. The Group Filter appears.
2. Select the required group. You can search for the group by name using the search box.
   Alternatively, click the **Select All** checkbox to include all groups at once in the Selected Group(s) section.

   The **Select All** option selects all the records of the current batch only.

3. Click **Apply**. The group filter gets applied and the users' list appears according to the applied filters.
4. Select the required users and click **Ok** to close the Users dialog.

Applying expertise filters

The type of expertise appears here as defined in the NewgenONE Business Workspace module. You can filter the users' list based on the expertise and ratings assigned to a user.

To apply the expertise filter, follow the below steps:

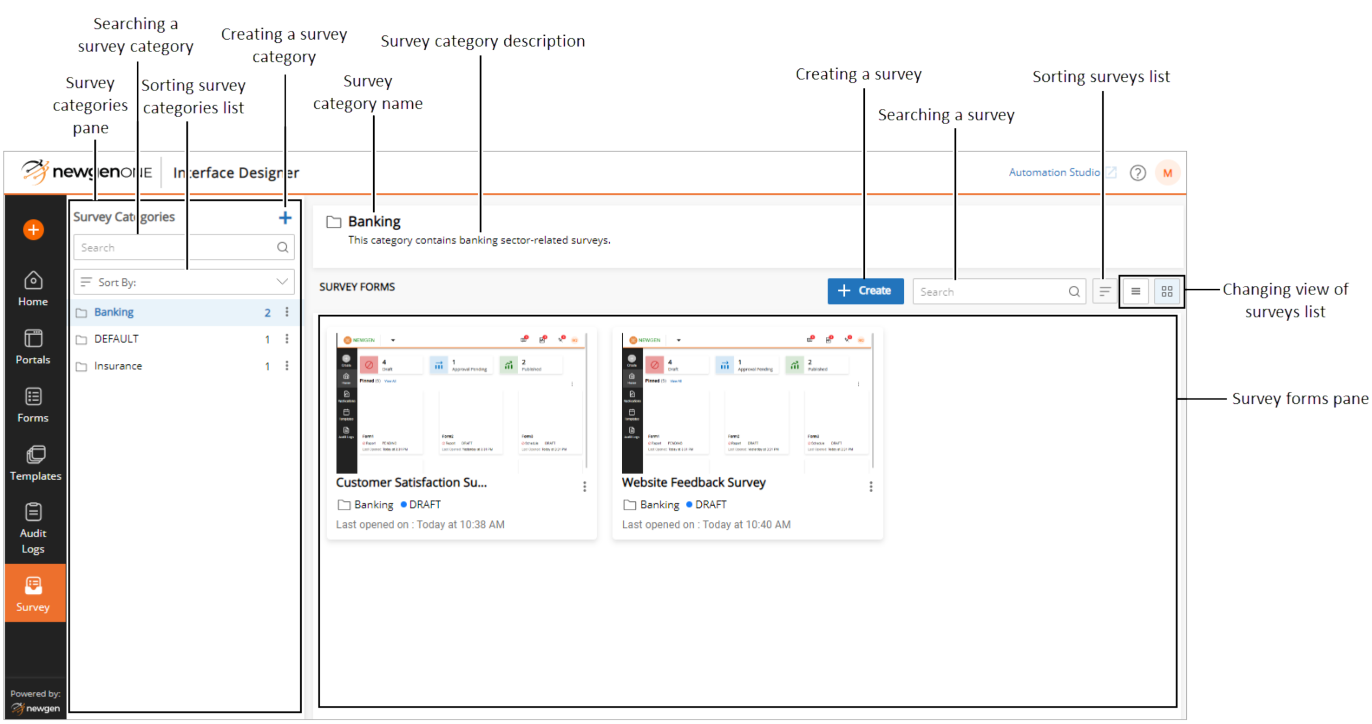
1. In the Users dialog, click the ellipsis icon present next to the group field. The list of available expertise appears.
2. Select the required expertise. You can search for the expertise by name using the search box.
   Alternatively, select the **All Expertise** checkbox to filter users with all types of expertise.
3. Click the **Select Rating**. The available list of ratings appears.
4. Select the required ratings given to the user for the selected expertise.
   Alternatively, select the **All** checkbox to filter users for all types of ratings for the selected expertise.
5. Select the required users and click **Ok** to close the Users dialog.

Creating and managing surveys

A survey is a research method used to gather information from a predefined group of respondents. It gives organizations an insight into the usage of a particular product or service. The data received from respondents helps businesses make informed decisions, develop effective strategies, and enhance end-user satisfaction.

The Survey Designer feature allows you to create new surveys and manage the existing ones. It also allows you to categorize surveys as Banking, Insurance, Hospitality, and more.

For example, a bank launched its new website three months ago with features such as quick money transfer, managing and paying utility bills, sending money to the users of other banks, and more. The bank approaches an application developer to design a survey that helps them analyze the satisfaction level and identify the challenges faced by customers with the usage of these features. Using the survey designer, the developer can design a survey with the right set of questions that help the bank gather appropriate data from the customers.



The Survey tab consists of the following UI elements:

Element	Description
Survey Categories pane	Displays a list of survey categories and the number of surveys listed within each category. Select the required category to view the complete list of surveys available within it.
Searching a survey category	Allows you to search a survey category by name.
Sorting survey categories list	Allows you to sort the survey categories list. The available criteria are: • **Sort Order** selected as **Ascending** and **Sort By** selected as: ◦ **NAME** — Sorts the survey categories list in ascending order by name. ◦ **No. of Assets** — Sorts the survey categories list in ascending order of the number of surveys listed within it. • **Sort Order** selected as **Descending** and **Sort By** selected as: ◦ **NAME** — Sorts the survey categories list in descending order by name. ◦ **No. of Assets** — Sorts the survey categories list in descending order of the number of surveys listed within it.
Creating a survey category	Allows you to create a new survey category. For procedural details, refer to the Creating a survey category section.
Survey category name	Displays the name of the survey category.
Survey category description	Displays the description of the survey category.
Survey forms pane	Displays the survey forms listed in the selected survey category. Select the required form to create, view, or modify the survey definition.
Creating a survey	Allows you to create and design a new survey. For procedural details, refer to the Creating a survey section.
Searching a survey	Allows you to search a survey by name.

Element	Description
Sorting surveys list	Allows you to sort the surveys list. The available criteria are: • **Sort Order** selected as **Ascending** and **Sort By** selected as: ◦ **Name** — Sorts the surveys list in ascending order by name. ◦ **Created By** — Sorts the surveys list in ascending order by the name of the creator.. ◦ **No. of Assets** — Sorts the surveys list in ascending order of the number of surveys listed within it. • **Sort Order** selected as **Descending** and **Sort By** selected as: ◦ **NAME** — Sorts the surveys list in descending order by name. ◦ **Created By** — Sort the surveys list in descending order by the name of the creator. ◦ **No. of Assets** — Sort the surveys list in descending order of the number of surveys listed within it.
Changing view of surveys list	Allows you to change the view of the surveys list from graphical (tile view) to textual (list view). • **Tile View** — Displays the surveys list in the form of tiles. • **List View** — Displays the surveys list in the form of a list.

Related topic(s)

- Creating a survey category
- Creating a survey
- Previewing a survey
- Editing a survey
- Deleting a survey

Creating a survey category

A survey category allows you to group surveys according to their business purpose. A category defines a default flow that a user can refer to while creating surveys serving similar business needs in the future. For example, an application developer can manage all the surveys created for an insurance corporation such as Insurance Policy Surveys, Insurance Agent Evaluation Surveys, and more, under a category named Insurance.

To create a new survey category, follow the below steps:

1. Navigate to the Survey tab and click the add icon ➕ in the Survey Categories pane. The Create Category dialog appears.
2. In the **Category Name** field, specify the name of the survey category.
3. In the **Description** field, specify a brief description of the survey category.
4. Click **Create**. The survey category gets created.
   Select the newly created category from the Survey Categories pane. The section specific to the selected category appears.

Related topic(s)

- Editing a survey category
- Deleting a survey
- Creating a survey

Editing a survey category

To edit details of a survey category, follow the below steps:

1. Navigate to the Survey tab and click the ellipsis icon ⋮ against the required category.
2. Click **Edit**. The Edit Survey Category dialog appears.
3. Make the required changes.
4. Click **Save**. The changes made to the survey category details get saved.

Deleting a survey category

To delete a survey category, follow the below steps:

1. Navigate to the Survey tab and click the ellipsis icon ⋮ against the required category.
2. Click **Delete**. A dialog asking to confirm the deletion appears.

   Deleting a survey category deletes all the surveys listed within it.

3. Click **Confirm** to delete the selected survey category.

Creating a survey

To create a survey form, follow the below steps:

1. Navigate to the Survey tab and select the required category from the Survey Categories pane.
   A section specific to the selected survey category appears. It displays a list of survey forms available within the category.
   Alternatively, you can also create a new survey category and then create a survey form within it. For procedural details, refer to the Creating a survey category section.
2. Click **+ Create**. The Create Survey dialog appears.
3. In the **Survey Name** field, specify the name of the survey form.
4. In the **Description** field, specify a brief description of the survey form.
5. Click **Create**. The survey gets created. It is now visible within the selected category as a tile or a list item.
6. In the **SURVEY FORMS** section, click the survey tile. The survey designer appears. The Survey Definition tab appears by default.
7. In the **Title** field, specify a title for the survey.
8. (Optional) In the **Description** field, specify a detailed description of the survey.
9. In the **Duration** field, click the dates to specify the start and end date for the survey. Alternatively, you can enter the date in dd/mm/yyyy format manually.
10. *(Optional)* In the **Logo** field, click **Upload** to select an image from your local machine. This image is used as a logo for the survey.

    > The system supports JPG, JPEG, and PNG images with a maximum size of 100kb.

11. In the Survey Display Format field, select:
    - **Show One Question At A Time** — to display one question at a time.

      > Use this format to create short or single-page surveys containing less number of questions. The format is also useful for lengthy questions.

      one at a time, rather than displaying all the questions simultaneously. This approach is commonly used in surveys, quizzes, forms, and other data collection or decision-making scenarios.
    - **Show All Questions At Once** — to display all questions on the same page.

> Use this format to create short surveys where the answers can be a short write-up or multiple choice.

- **Show Questions Page Wise** — to display the list of questions page-wise.

> Use this format to create lengthy surveys with a large number of questions.

12. Turn on the **Show Question Number** toggle to display the question numbers in the survey.
13. Turn on the **Show Progress Number** toggle to display the progress that the user makes while filling out the survey. This allows the respondent to keep track of what percentage of the survey is complete.
14. Turn on the **Show Welcome Page** toggle to include a welcome page in the survey.
15. Turn on the **Show Feedback** toggle to include a field that allows the surveyor to provide feedback on the survey. This helps the survey design engineer improve the overall quality of the survey.
16. Click **Next**. The Create Questions tab appears.
17. In the Welcome Message section, specify a welcome text for the survey. This message appears when the surveyor launches the survey. Alternatively, you can use the text appearing by default.
    You can format the welcome text using the available formatting options. For more information, refer to the Formatting text section.

In the Page Title section, the following options appear:

Option	Description
Add Page	Allows you to add another page to the survey. By default, a survey contains only one question.
Add Question	Allows you to add questions to the survey page. For procedural details, refer to the Adding questions to a survey section.
Import Question	Allows you to import questions to the survey page. For procedural details, refer to the Importing questions to a survey section.
Copy	Allows you to create a copy of the current page along with the questions added to it.
Delete	Allows you delete a page. Deleting a page deletes all the questions added to it.

18. In the Thank You Page section, specify a thank you text for the survey. This message appears when the respondent completes the survey. Alternatively, you can use the text appearing by default.
    You can format the thank you text using the available formatting options. For more information, refer to the Formatting text section.
19. Click **Save** to create the survey.

Before saving the survey, you can use the Preview option to see if the survey is functioning as expected.

Related topic(s)

- Previewing a survey
- Editing a survey
- Deleting a survey

Adding questions to a survey

To add questions to a survey, follow the below steps:

1. In the **Page Title** section, click **Add Page**. Click this option again to add more pages to the survey form.
2. Click the expand icon against the required page.
3. Click **Add Question**. The Properties tab appears.
4. In the **Question** box, specify the question.
5. *(Optional)* Select the **Make this question mandatory** checkbox to mark this question as mandatory.
6. Refer to the below table to select the **Answer Type**:

Answer type	Description
Dropdown	To specify options for a dropdown answer type, follow the below steps: 1. *(Optional)* Select the **Enable Scoring for the Answers** checkbox to enable score calculation for the answer selected. 2. Specify the **Option**. For example, 5. A **Value** gets generated based on the option you specified. To enter a different value, replace it with the value of your choice. For example, Excellent. 3. Specify the score under the **Scoring** option. This field appears when you select the **Enable Scoring for the Answers** checkbox. 4. Click the add icon to add the specified option to the list. Similarly, add the rest of the options to your answer list.
Multiple Choice (Single Select)	To specify options for a multiple choice (single select) answer type, follow the below steps: 1. *(Optional)* Select the **Enable Scoring for the Answers** checkbox to enable score calculation for the answer selected. 2. Specify the **Option**. A **Value** gets generated based on the option you specified. To enter a different value, replace it with the value of your choice. 3. Specify the score under the **Scoring** option. This field appears when you select the **Enable Scoring for the Answers** checkbox. 4. Click the add icon to add the specified option to the list. 5. Select the selection style under the **Single Select Display Style** option. 6. Select the alignment of the options. Similarly, add the rest of the options to your answer list.
Multiple Choice (Multi-Select)	To specify options for a multiple choice (multi select) answer type, follow the below steps 1. (Optional) Select the **Enable Scoring for the Answers** checkbox to enable score calculation for the answer selected. 2. Specify the **Option**. A **Value** gets generated based on the option you specified. To enter a different value, replace it with the value of your choice. 3. Specify the score under the **Scoring** option. This field appears when you select the **Enable Scoring for the Answers** checkbox. 4. Click the add icon to add the specified option to the list. 5. Select the selection style under the **Multi-Select Display Style** option. 6. Select the alignment of the options. Similarly, add the rest of the options to your answer list.
Short Answer	Not applicable
Long Answer	Not applicable

Answer type	Description
Date/Time	Not applicable
Star Rating	Select the **Scale Count** to specify the star rating for the answer.
Opinion Scale	To specify options for an opinion scale, follow the below steps 1. Select the **Scale Count**. For example, 10. 2. Enter the **Left** and **Right** labels of the opinion scale. For example, the left label is Poor and the right label is Excellent. 3. *(Optional)* Enter the **Middle Label** of the opinion scale. For example, Average. 4. Select the **Opinion Scale Display Style**.

7. Click **Save**. The question gets added to the survey.
8. Click **Question Branching**. The Question Branching dialog appears.

> The Question Branching feature allows you to design a survey where a question gets displayed based on the answers selected for the previous questions. Thus, you can deliver questions to the respondent in a controlled manner.
> For example, in a bank-related survey, question branching is used to gather specific information based on customer's responses. The initial question asks whether the respondent has a savings account with the bank. If they answer "Yes," the survey proceeds to inquire about their satisfaction with the savings account services and the features that matter most to them. On the other hand, if the respondent answers "No," they are asked about the specific reasons for not having a savings account, such as preferring another bank, high fees, or other factors. This approach enables the bank to collect valuable feedback on customer satisfaction and the factors influencing their banking choices.

9. Click **Create Logic**.
10. Select the excepted answer against the selected question.

> Click the **How it works** link to know the use of question branching.

11. Now, select the condition or logic to create the question branching.
12. Refer the below table to select the logic for branching questions:

Option	Description
Then Show Question	This option allows you to display the selected question if the answer selected to the previous question matches the expected answer selected while creating this logic.
Hide Question	This option allows you to hide the selected question if the answer selected to the previous question matches the expected answer selected while creating this logic.
Show Question Set	This option allows you to display the question set if the answer selected to the previous question matches the expected answer selected while creating this logic.

Option	Description
Hide Question Set	This option allows you to hide the selected question set if the answer selected to the previous question matches the expected answer selected while creating this logic.
Terminate Survey	This option allows you to end the survey if the answer selected to the previous question matches the expected answer selected while creating this logic.
Go to the Thank You Page	This option allows you to display the Thank You page directly if the answer selected to the previous question matches the expected answer selected while creating this logic.

13. Select the question to which the selected logic applies.
14. Click **Save** to save the logic created for branching questions.
15. Click the **Question Set** option present in the upper right corner. The Question Set dialog appears.

Question Set allows you to create a set or group of questions that are similar or related to each other.

16. Click **Create New**.
17. Specify the **Name** of the question set.
18. Select the questions to group under the created set.
19. Click **Create**. The question set gets created.

Additional options:

- Use the **Cancel** option to close the Question tab without saving the changes.
- Use the modify option to change the option in the answer. Then, click **Update** to save the changes made to the Question or Answer Type.
- Use the delete option to remove the option from the answer. Then, click **Update** to save the changes made to the Question or Answer Type.
- Use the duplicate option to create a duplicate of the question along with all its properties. You can modify the duplicated question according to your requirements.

Configuring survey themes

The Themes feature allows you to change the look and feel of the survey.

To configure survey themes, follow the below steps:

1. Click the **Themes** option present in the upper right corner. The Themes dialog appears.
2. Refer to the below table to configure survey themes:

Option	Description
Theme (Dropdown)	Use this option to select the theme for the survey. The Default theme appears by default.
Download Theme	Use this option to save the selected theme to your computer. The theme file gets downloaded in the JSON format.
Upload Theme	Use this option to upload a theme file in the JSON format from your computer.
Delete Theme	Use this option to delete the selected theme. The default theme cannot be deleted.
Text Size	Use this option to increase or decrease the size of the text in the survey. Click the add icon **+** to increase the text size, and the minus icon **-** to decrease.
+Theme Color	Use this option to change the color of the survey title.
Form	**Background** — Use this option to upload a background image for the survey.
	Background Color — Use this option to select a background color for the survey.

3. Click **Apply** to apply the currently configured themes to the survey.
Use the **Save As** option to save the currently configured theme. In the **Saving as New Theme** dialog, specify the **Theme Name** and click **Create New**.

Importing questions to a survey

To import questions to a survey, follow the below steps:

1. In the **Page Title** section, click **Add Page**. Click this option again to add more pages to the survey form.
2. Click the expand icon against the required page.
3. Click **Import Question**. The Import Questions tab appears.
4. Click the **Click here to download excel template** link to save an excel template to your computer in which you can define the survey questions.
5. Open the Excel template on your computer.
6. Specify the **Question Label**, that is the question and the required **Answer Type** against it. For selection-type answers, specify all the options in the spreadsheet. An example is provided for your reference in the sheet.
7. Save the Excel file.
8. In the survey designer, click **Choose File** to select the file containing survey questions from your local machine.
9. From the **Separator** dropdown, select the required separator. For example, ",".
10. Click **Define Mapping** to map the target fields with the source fields.
11. For every Target Field, select the required **Source Field**. For example, for *Option 1* Target field, select *Option 1* as the Source field.
12. In the **No of Questions imported per page** box, specify the number of questions that must get imported per page.
13. Click **Import.** The questions get imported.

Previewing a survey

To preview a survey, follow the below steps:

1. In the Survey Categories pane, select the required category. The surveys listed within it appear.
2. Click the ellipsis icon against the required survey and select **Preview**. A preview of the selected survey appears.

Editing a survey

To edit a survey, follow the below steps:

1. In the Survey Categories pane, select the required category. The surveys listed within it appear.
2. Click the ellipsis icon ⋮ against the required survey and select **Edit**. The survey design page specific to the selected survey appears.
3. Make the required changes.
4. Click the **Save** option present in the upper-right corner of the page. The survey gets edited.

Deleting a survey

To delete a survey, follow the below steps:

1. In the Survey Categories pane, select the required category. The surveys listed within it appear.
2. Click the ellipsis icon ⋮ against the required survey and select **Delete**. A dialog to confirm the deletion appears.
3. Click **Confirm** to delete the survey.

Formatting text

Refer to the below table to use the text formatting options:

Option	Description
Style	Use this option to change the style of the selected text.
Font Style	Use this option to change the font of the selected text.
Font Size	Use this option to change the size of the selected text.
Font Color	Use this option to change the color of the selected text.
Background Color	Use this option to change the background color of the selected text.
Bold	Use this option to bold the selected text.
Italics	Use this option to italicize the selected text.
Underline	Use this option to underline the selected text.
Strikethrough	Use this option to strike through the selected text.
Outdent	Use this option to change the outdent of the selected text, that is, shift the text towards the left margin.
Indent	Use this option to change the indent of the selected text, that is, shift the text away from the left margin or towards the right margin.
Change Text Alignment	Use this option to change the alignment of the selected text from left to right and vice-versa.
Remove text formatting	Use this option to clear the formatting applied to the selected text.
Bulleted list	Use this option to enter a bulleted list.
Numbered list	Use this option to enter a numbered list.