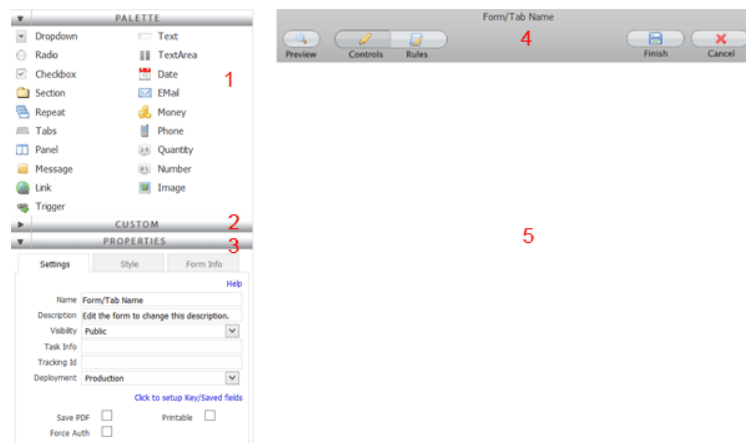


## Form Builder - Designer Workspace Overview

[supportcenter.nc4.com/hc/en-us/articles/218362018-Form-Builder-Designer-Workspace-Overview](https://supportcenter.nc4.com/hc/en-us/articles/218362018-Form-Builder-Designer-Workspace-Overview)

The Form Builder designer workspace is where you create your custom forms and tabs.



1. Palette. The palette consists of controls that can be dragged and dropped onto your design.

- Dropdown - This adds a dropdown list to your form. You define the choices by editing the control's *Options* properties.
- Radio - This adds mutually exclusive radio buttons. You define the number of radio buttons and the specific choices by editing the control's *Options* properties.
- Checkbox - Adds a set of checkboxes so users can check one or more. As with the other selection controls, you edit the control's *Options* properties to define the number of checkboxes and the specific choices.
- Section - Use sections to create groups of controls that users can expand and collapse.
- Repeat - Say you want users to be able to enter one or more addresses, phone numbers (or other data); they might have only one address or phone number but could have more. With repeating controls, your form can display dynamically as many controls as users need as opposed to always showing extra input controls that might rarely be needed. Drag the repeat control into your form and then drag another control into the repeat control just like you would for sections or panels. When the control is inside your repeat control, click the control to see its properties. Notice that two Settings properties have been added to the properties you normally see for the control: Min# and Max#. These minimum and maximum properties control the behavior users will see on the form. For example on a phone control, set min # to 1 and the max # to 5, when the user accesses the form they will see one phone field with an icon. Clicking this icon automatically displays another phone field. Users can click and add up to five phone fields.
- Tabs - This control lets you create a tabbed form. DO NOT use the tab control when creating a custom tab that will be published to an existing E Team form.
- Panel - Use panel controls to create columns. If you want two columns in your form, drag in two panels; drag in three panels for a three-column layout, and so on. By default a panel's width is set to 49%, so when you drag two panels into your form, the second panel automatically will line up next to the first panel. Panels have a 1px border so you can see their boundaries; so for a two-column layout this means you cannot make both widths 50% or there will not be enough room on your form to line up the panels side by side. Since panels are group controls, you drag other controls inside them.
- Message - Use this when you want static text on your form. You provide the text in the control's *Message* property.
- Link - Use the Link Control when you want to include a URL on your form. When users click the link, the target URL will open in a separate browser window.
- Trigger - The trigger control can be used to add a button to your form and is used in conjunction with some rules. If your form does not have rules you will not need the trigger control.
- Text - Allows users to type any text and is intended for short, one-line entries.
- Text Area - Lets users type any text and is intended for longer, multi-line submissions. When users enter data, scroll bars appear as needed to accommodate the text.
- Date - The date control lets users enter a date by clicking a calendar icon.
- Email - Requires users to enter a valid Email address.
- Money - Allows users to enter U.S. currency. Users may type a dollar sign, commas and a decimal point, but if they don't the form will display these symbols for them. Users wishing to display other than U.S. Currency should use the standard number control.
- Phone - Used for entering a phone number and allows any of the following formats: xxx.xxx.xxxx, xxx-xxx-xxxx, xxx.xxxx, or xxx-xxxx. If you want to enforce one of the 10-digit formats (to require an area code), you can edit the control's *Pattern*.
- Quantity - Used for entering quantities or any whole numbers (integers). The form displays an error message if users enter decimal points, commas, or anything other than an integer.

- Number – Used for entering decimal numbers. Users may enter any number of digits after the decimal place (although you can edit the control's *Max Length* or *Pattern* property to impose a practical limit).
  - Image - This control lets you include an image (picture, logo, etc.) to your form. The control allows you to use .JPG, .GIF, and .PNG files or any other image type that your browser supports. When you drag in the control, you'll see a Browse button and an Upload Image button. Click Browse, navigate to the image you want, and click Upload Image. After you upload the image, the Browse and Upload Image buttons disappear, so if you aren't satisfied with the image, delete the image control and drag in a new one. The image will display on each form instance created in E Team. Note: You cannot resize your image after it is in your form, so make sure the image will fit sensibly in your form before you upload it.
2. Custom. Custom Controls allow you to reuse fields, that are created for one form on any number of forms. When expanded, this section displays a list of [custom controls created specifically for E Team](#) and delivered with your system. These controls mimic the [common features and functions](#) already found on core E Team forms. Unless otherwise noted, E Team custom controls should only be used on custom forms, they should NOT be added to custom tabs. You may also [create your own custom controls](#) and add them here.
  3. [Properties](#). Controls have Setting properties and Style properties. Generally speaking the Setting properties influence the control's behavior and the Style properties affect its appearance. The specific properties seen depend on the type of control selected in your form. Some controls have more properties than others. All properties are optional, with the exception of the control label. This area can also be used to set default values for your controls.
  4. Title bar and Controls.
    - Displays your form or tab name.
    - Preview. On click open your form in preview mode. Your form must be saved to preview changes.
    - Controls. Allows you to toggle between the design control view and the rules view.
    - [Rules](#). Allows you to toggle between the rules view and the design control view.
    - Finish. On click saves your form and all changes and returns you to the main Form Builder Manager active view screen.  
*It is recommend when working on a lengthy form design, or working for a long period of time, that you use this option intermittently to save your work.*
    - Cancel. On click closes this window without saving changes and returns you to the main Form Builder Manager active view screen.
  5. This is your main workspace area.