
Formstack Platform Training Outline

Section 1

Form Building Features

- [Form Importer](#)
- Drag & drop functionality
- Field types
- [Field options](#)
- [Field security features](#)
 - o Hide input
 - o Remove data from notification emails
 - o Require confirmation
 - o Restrict access to submission data

[Form Building Knowledge Base Article](#)

[Form Building Video](#)

Form Extras

- [Custom Identifier](#)
- [Invisible reCAPTCHA](#)
- Prompt For Location
- [Save and Resume](#)
- [One Question at a Time](#)

Section 2

Logic

- [Applying Logic](#)
 - o Conditional Logic allows you to show or hide a field (or entire section) based on what the user selects for another field on a form
 - o To use Conditional Logic, click on a field within the form builder to edit it. This is the field you will show or hide based on choices made in previous fields.
 - o The form MUST contain a field with options
 - o Can be applied to sections

[Field Logic Video](#)

[Conditional Logic Tips Knowledge Base Article](#)

[Sectional Conditional Logic Knowledge Base Article](#)

Styling

- [Creating a Theme](#)

[Custom Form Themes Knowledge Base Article](#)

[Quick Start Customizing Form Themes Knowledge Base Article](#)

Section 3

Settings

- [Notification emails](#)
- [Confirmation emails](#)
- [Emails and actions \(routing\)](#)
- [Submissions message](#)
- Security ([encryption](#) and [PGP](#))

[Form Settings Video](#)

Sharing options

- [Embed](#)
- Hosted URL
- CMS
- [Social Media](#)
- [Javascript options](#)

Section 4

Submissions/Analytics

- [Managing Submissions](#)
- [Creating Reports](#)
- [Scheduled Exports](#)