Creating an Inquiry Form

This guide will cover:

- Creating inquiries on existing records when there are no expectations for follow up.

**Step One**

To begin select Inquiry Form under the Inquiries module.

![Image of Inquiry Form](image)

Click [New Inquiry Form].

Complete the following for the form information section:

- Name
- Inquiry From Owner
- **Status**: Select “Inactive” (Best practice is to always leave inactive until ready to make inquiry form available to the public)
- **Email Template**: Click the 📧 icon; search and select your template
- **Return URL**: Enter “www.uc.edu”
- **Cancel Return URL**: Enter “www.uc.edu”
- **Relabel Submit Button**: Leave blank
- **Relabel Cancel Button**: Leave blank
- **Form Submission Message**
- **Description**
- **Lifecycle Role**
- **Lifecycle Stage**
- **Case Priority**
- **Mail Profile**
- **Case Status**

Leave the assignment settings as is.
Note: Both Form Information and Assignment Settings may be updated after the form has been created.

Click Save.

Step Two

To build and create the “look” of the form, click Launch the form builder.

A new window will open that includes the form builder. The form builder will default to one page, consisting of one section with the Last Name field already displaying.

To add additional fields, first ensure that the section has been selected. Click on Untitled Section (the selected section will turn light blue).

Open the Add Fields pane on the left hand side of the window; all of the available field options will display.

Within the list select the following fields:
- First Name
- Middle Name
- Email
- Date of Birth
- Contact Street
- Contact City
- Contact State-Picklist
- Contact Postal Code
- Contact Country-Picklist
- First Source

Once the above fields have been found and selected, click Add Fields to insert them into the section.

Now that the fields have been added to the section, the order and location of the fields can be re-arranged. To re-arrange, hover over the field until the outline box appears then click and drag the desired field to the preferred location within the section. A blue line will appear when the field is placed in an allowed location.
When a field is selected, the properties will display for that field. The field properties allow users to:

- Hide the field
- Change the label of the field
- Indicate if the field will be required
- Provide help text

Click on the First Name field. Under properties select Yes for Required and click Apply.

Click on the Contact Country field (now labeled Country). Under properties:

- Select United States for Default Value.
- Select Yes for Read Only.
- Click Apply.

Click on the First Source field. Under properties:

- Select Yes for Hidden.
- Select Online Information Request for Default Value.
- Click Apply.
- This field will now be grayed out on the inquiry form builder and will not be visible to the student.

Click on the Email field (now labeled personal email). Under properties enter “Please provide us with your personal email address.” for the Help Text. Click Apply.

Click on the Untitled Section. Under properties enter “Contact Information” for the Section Title. Click Apply.
Click on **Form Properties**. From here a branded banner and footer can be added. The form width can also be adjusted as well.

**Under Header, click** [Edit RichText](#).

- The RichText Editor window will display to add an image. Click the ![image icon](#) icon.
- Within the image info tab, click ![Browse Server](#).
- Open the Undergraduate Admissions folder by clicking the (+) sign.
- Click on **Headers**.
- Select the **Admissions General Header** photo by double-clicking on the image.
- Add alternative text (for accessibility purposes). Enter “University of Cincinnati Undergraduate Admissions Banner”
- Click the ![lock ratio icon](#) and enter “600” in the **width** field.
- Click **OK**.

![Image Properties window](#)

Click **Apply** to close the RichText Editor window.

**Under Footer, click** [Edit RichText](#).

- The RichText Editor window will display once again. Click the ![image icon](#) icon.
- Within the image info tab, click ![Browse Server](#).
- Open the Undergraduate Admissions folder by clicking the (+) sign.
- Click on **Footers**.
- Select the footer-blank photo by double-clicking on the image.
- Add alternative text (for accessibility purposes). Enter “Banner with no images”
- Click the lock ratio icon and enter “600” in the width field.

Click **OK**.

Click **Apply** to close the Richtext Editor window.

In the **Form Width** field, enter “600” then click **Apply**.

Click **Preview** to open a window displaying how the form will be seen by the student or anyone filling out the form.
Close the preview window.

Click Save and close the window for the Form Builder.