

Hi I'm Kelsey! Introduce  
yourself in the chat and let  
us know which institution  
you're representing!

# Form Beautification

Use field groups, choice fields, and conditional  
logic to make your forms look their best.

# Form Beautification

Use field groups, choice fields, and conditional logic to make your forms look their best.

# Agenda

1. Welcome
2. Strategies
3. Custom Images
4. Rich Text Content
5. HTML
6. Repeatable Fields
7. Q&A
8. Close



# Post-Webinar Survey

- 2 minutes!
- We love knowing what you like or would like improved!
- Really helps me (Kelsey) out when presenting to my bosses 😊
- I'll provide a link at the end or you will get an email tomorrow!!!

\* 3. Overall, were you satisfied with your training?

☐ Yes

☐ No

\* 4. On the following scale, how **helpful** and **informative** was the training webinar?

1 - Not Helpful

2

3 - Neutral

4

5 - Helpful

☐

☐

☐

☐

☐

Additional comments to reflect your score.

5. Additional feedback? We value your feedback and use it to improve the quality of our training webinars over time.

6. Don't see a session that sparks your interest? Leave us a comment with a topic that we can build a session around in the future!

# Why worry about it?

# Avoid the exit!

Organize and simplify your forms to encourage completion.



THE AVERAGE HUMAN  
ATTENTION SPAN IN  
2000



THE AVERAGE HUMAN  
ATTENTION SPAN IN  
2013



THE AVERAGE  
ATTENTION SPAN OF A  
GOLDFISH

# Strategies

# Be strategic with field size

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Large

Medium

Small

X-Small

## Field Size

X-SMALL

SMALL

MEDIUM

LARGE

? Hel



# Update the field size

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Update Form

New Form

Text Field

BUTTON NAME

Text Field

Field Settings

Details

Field Name

Text Field

Field Description

Field Size

X-SMALL

SMALL

MEDIUM

LARGE

☐ Required

# Use field groups

## Outstanding Student Leader of the Year Award Nomination

### Supporting Documents

Upload File



How did they impact the organization and campus and why should they get this award?

## Service Award

Nominee

Why should they win this award?

## Emerging Leader Award Nomination

Name of Nominee

Which organization benefited from their leadership?

## Community Engagement

Nominee

Why should they win this award?

# Condense questions where possible

1. Does your event need food?
2. Hot food or cold food?
3. Does your event require security?
4. How many security officers?
5. Does your event need sound equipment?
6. Will there be reserved parking?

A lot of  
separate  
questions.

# Condense questions where possible

1. Does your event need food?

Will your event need the following

CATERING

ROOM SET-UP

AUDIO-VISUAL NEEDS

ADVERTISING

RESERVED PARKING

5. Does your event need sound equipment?

6. Will there be reserved parking?

Condense into one  
question!

# Condense questions where possible

- Shorter form
- Takes up less visual space and requires less scrolling
- Form will load faster!

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Do you prefer to study or prepare for your academic coursework

ALONE

WITH FRIENDS OR CLASSMATES

IN A COMMON AREA

Which academic behaviors do you complete most often?

☐ Researching academic journals & publications

☐ Reading textbooks

☐ Writing papers

☐ Preparing presentations

☐ Practicing performances (vocal, instrumental)

☐ Working on group presentations

# Condense questions where possible

1. Create a choice field question and allow multiple selections.
2. You can use conditional logic to expand your questioning.

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Will your event need the following

CATERING

ROOM SET-UP

AUDIO-VISUAL NEEDS

ADVERTISING

RESERVED PARKING

# Use conditional logic

- **Streamlined User Experience:** Students only see relevant fields based on their inputs.
- **Efficient Processes:** Reduces form complexity and saves time for administrators.
- **Automated Approvals/Notifications:** Logic triggers routing for approvals, speeding up workflows.
- **Data Accuracy:** Conditional fields ensure all necessary information is captured based on specific scenarios.

# Select the field you want to show or hide and click the pencil icon.

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Outstanding Student Leader of the Year Award Nomination

Name of Nominee

Which organization has benefited from their leadership?

Signature Pad Field

CLICK TO SIGN



# Select “Conditionals”

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The screenshot displays the 'Update Form' interface for a '2024 Student Leader Excellence Award Nomination' form. The form is titled '2024 Student Leader Excellence Award Nomination' with a subtitle 'Nominate for the 2025 award. Deadline for nomination is April 10th!'. The form contains the following fields:

- Outstanding Student Leader of the Year Award Nomination** (Section Header)
- Name of Nominee** (Text Field)
- Which organization has benefited from their leadership?** (Text Field)
- Signature Pad Field** (Signature Pad)

The 'Field Settings' sidebar is open, showing the following options:

- Details** (Expandable Section)
  - Field Name**: Outstanding Student Leader of the Year Award Nomir
  - Field Description**: (Empty field)
  - Field Size**: X-SMALL, SMALL, MEDIUM (Selected), LARGE
- Field Group Settings** (Expandable Section)
- Conditionals** (Expandable Section)

# Create your “sentence”

trainingkelsey.presence.io/admin/form/update/2024-student-leader-excellence-award-nomination

2024 Student Leader Excellence Award

Nominate for the 2025 award. Deadline for nomination is April

Outstanding Student Leader of the Year

Name of Nominee

Which organization has benefited from their leadership

Signature Pad Field

Conditional Logic

Create conditional rules to show and hide fields based on the responding user and other fields.

ADD LOGIC

Show [field] if All [fields] of the following match. ADD

# Involve Demo

- Create a campus feedback form
  - Name
  - Email
  - What are you providing feedback on today?
    - Event Feedback
      - Which event?
      - Did you enjoy the event?
    - Facilities feedback
      - Which location?
      - How clean?
  - Use conditional logic

# Create (easy) custom images

# Create a Header

## 1. Use a tool you're familiar with

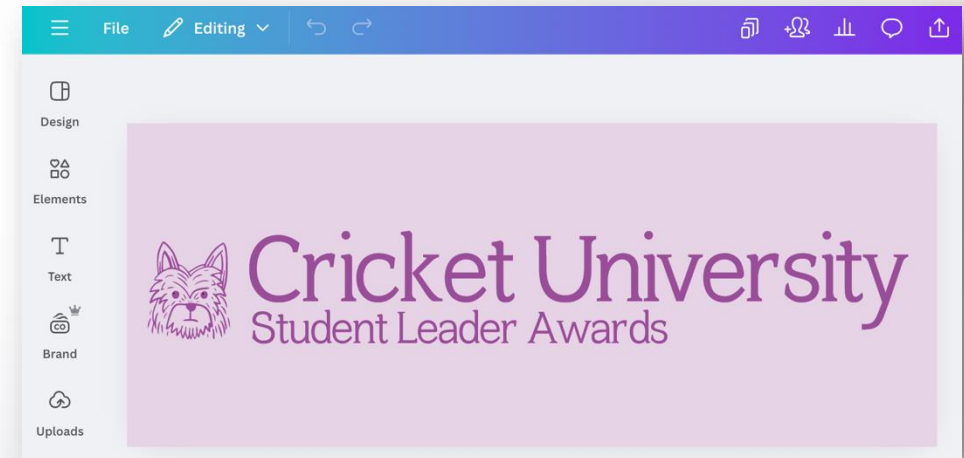
1. Canva
2. PowerPoint
3. Google Slides

## 2. Make the Image short and wide

1. 600px x 50px

## 3. Export the image or take a screen shot!

1. Macbook: Shift, Command, 4 – select your area
2. Windows: Windows key, shift, S – use the snip tool!



# Upload as an “image field”

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Large

---

Medium

---

Large

Text
Number
Choice

Advanced

Date/Time
Email
File Upload

Signature
Image Search

Layout

Content
Field Group
Header

Image

Widgets

# Remember Your Rich Text

# Rick text fields

- Section Headers
- Quote boxes
- Bold, italics, underlined
- Lists
- Insert images
- Insert links
- Youtube videos
- Edit HTML

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H1 H2 H3 H4 H5 H6 P PRE

**B** *I* U ~~S~~

- 

- 

</>    WORDS: 21 CHARACTERS: 136

## Create a Nice Header

### Subsections

- And
- Bullet
- Points!

### You Can Insert YouTube Videos!

*Great to provide detailed instructions for your processes.*



< Field Settings

Details

Field Name  
**Large**

Field Description

Field Size  
X-SMALL SMALL MEDIUM **LARGE**

☐ Required

Text Settings

Display As  
Single Line

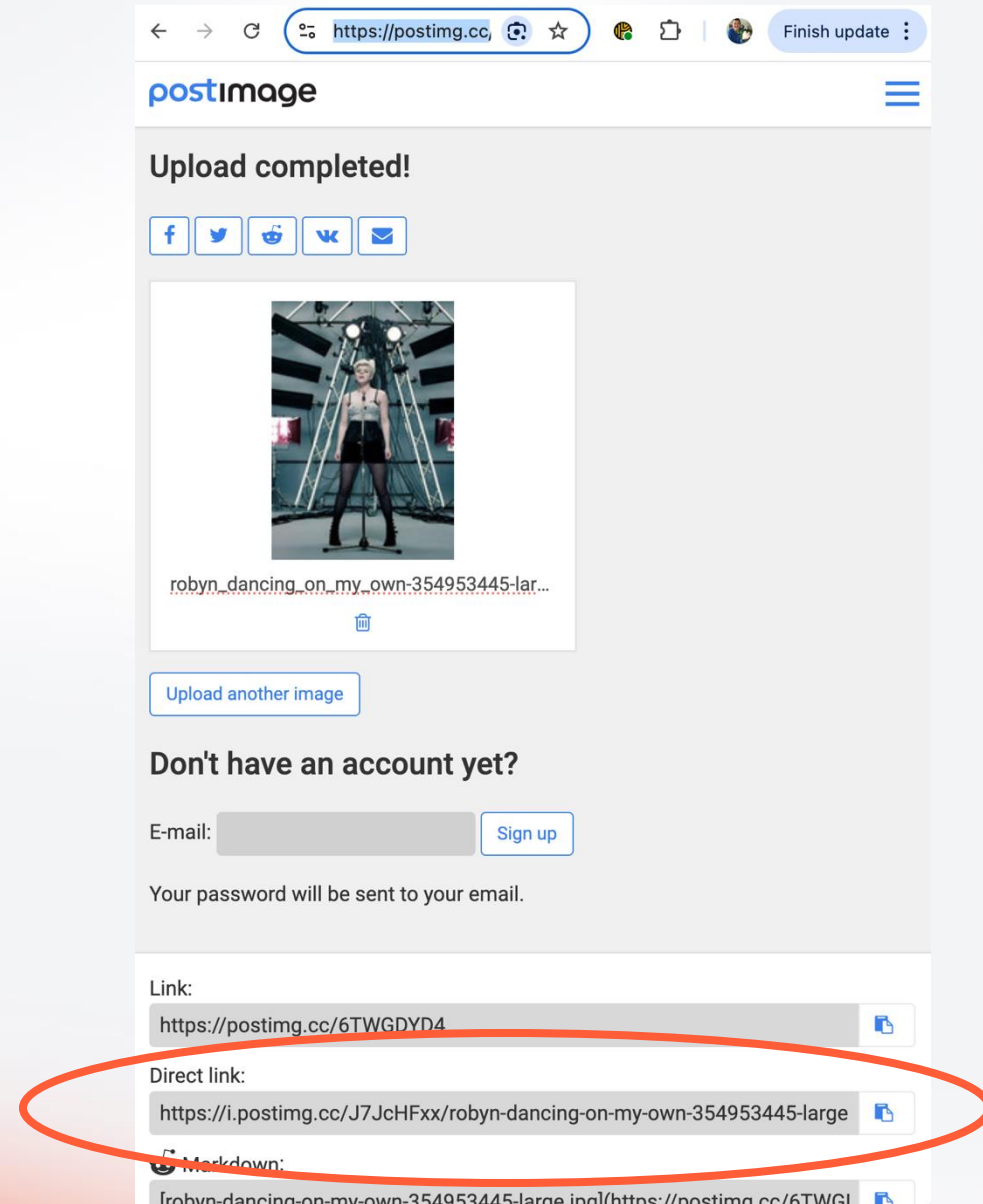
Single Line  
Paragraph  
**Rich-Text**  
Conditionals



# Images

- Add an image to your content using a host website.
- <https://postimg.cc/>
- Upload the image
- Select the DIRECT LINK

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Your password will be sent to your email.

Link:

<https://posting.cc/6TWGDYD4>



Direct link:

<https://i.postimg.cc/J7JcHFxx/robyn-dancing-on-my-own-354953445-large>



Markdown:

[robyn-dancing-on-my-own-354953445-large in1(https://posting.cc/6TWGI



# Images

- Select the “image” icon
- Paste in the entire direct link!

The screenshot displays the 'Update Form' interface in Modern Campus. A modal dialog is open, titled 'trainingkelsey.presence.io says', with the instruction 'Please enter an image URL to insert'. The input field contains the URL 'timg.cc/J7JcHFxx/robyn-dancing-on-my-own-354953445-large.jpg'. Below the input field are 'Cancel' and 'OK' buttons. In the background, the 'New Form' editor is visible, featuring a 'Text Field' with a rich text toolbar. The toolbar includes heading options (H1-H6), paragraph (P), preformatted (PRE), quote, bold (B), italic (I), underline (U), strikethrough, bulleted list, numbered list, link, unlink, and a redaction icon. A secondary toolbar below the first one contains icons for code, image, link, unlink, and play, along with word and character counts. The 'image' icon in this secondary toolbar is circled in red. Below the toolbars, a preview of an image showing stage lighting is visible.

# HTML Tricks

# HTML

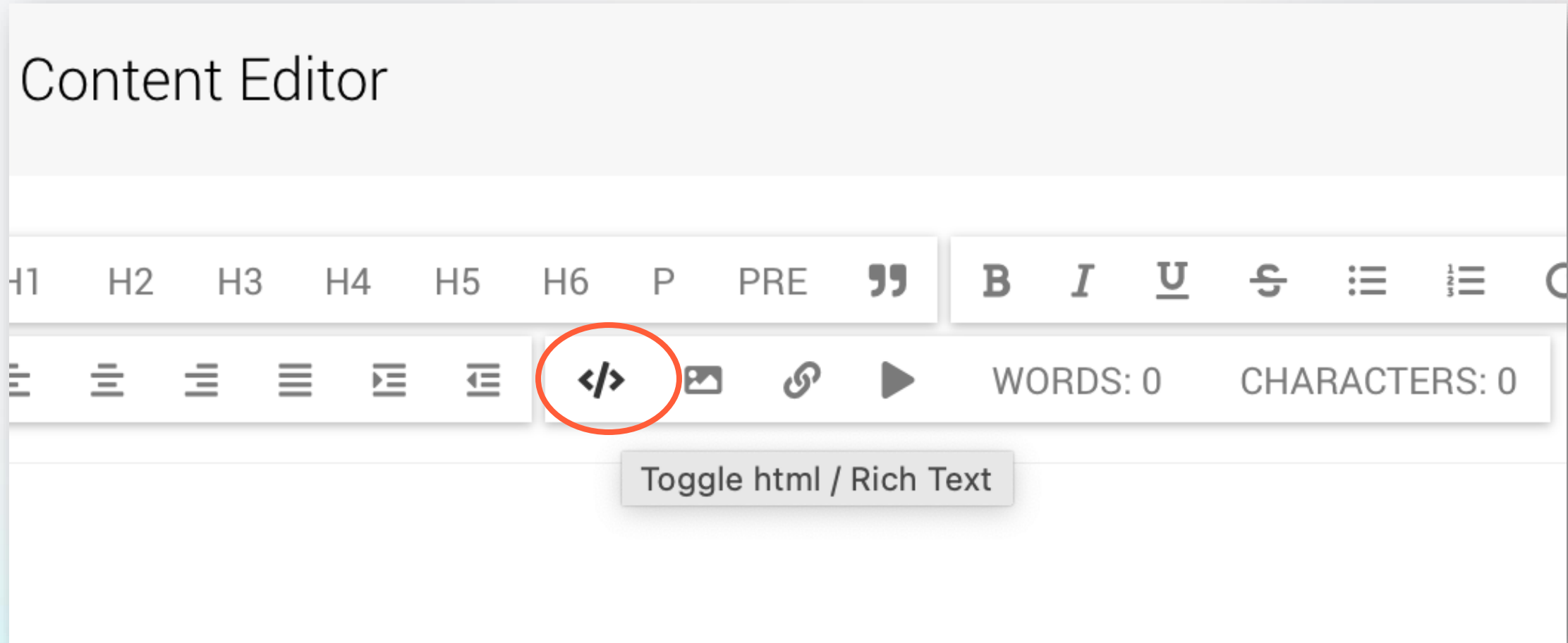
- **HTML (HyperText Markup Language)** is the code used to structure content on the web. It tells the browser what's a heading, paragraph, link, image, etc.\
- **Tags** are special keywords in angle brackets that define elements. Most come in pairs:
- `<p>This is a paragraph.</p>`
  - `<p>` is the opening tag
  - `</p>` is the closing tag
  - Everything between is the content

# Other common tags

- `<h1>` to `<h6>` – Headings
- `<a href="url">` – Link
- `` – Image (no closing tag)
- `<ul>`, `<li>` – Lists

# Click here to open the HTML Editor

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# Add “alt-text”

- Alt text allows a screen reader to read a description of your image
- Great way to create accessibility



# Add “alt-text”

- Open the HTML Editor
- Add to the image code
- alt=“describe the image”

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Text Field

H1 H2 H3 H4 H5 H6 P PRE ”

**B** *I* U ~~ABC~~ ☰ ☷ ↺ ↻ ⌛

`</>` WORDS: 1 CHARACTERS: 1

```
<div><p></p></div>
```



# Change Font Color

 WORDS: 21 CHARACTERS: 111

```
<h1 style="color.purple;">Create a Nice Header</h1>
<h3>Subsections</h3>
<ul>
  <li>And</li>
  <li>Bullet</li>
  <li>Points!</li>
```

 WORDS: 21 CHARACTERS: 111

# Create a Nice Header

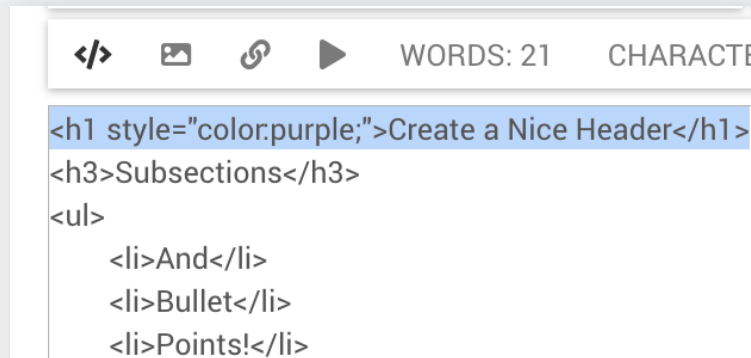
## Subsections

- And

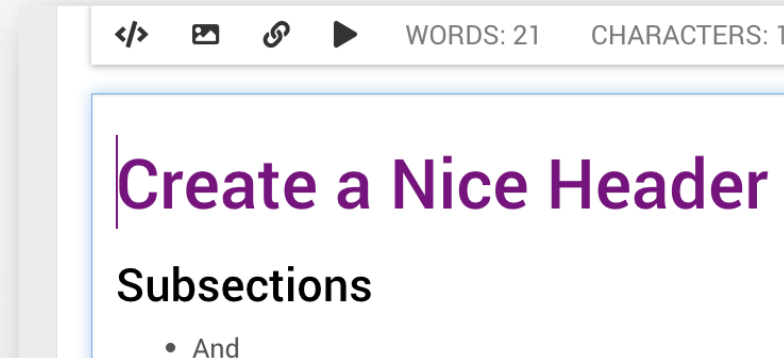
# Change Font Color

- Open the HTML editor </>
- Type `style="color:blue;"` within the tag of the text you want to change.
- Use colors or HEX codes

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A screenshot of an HTML editor interface. The top toolbar includes icons for code, image, link, and play, along with statistics: 'WORDS: 21' and 'CHARACTERS: 1'. The code area contains the following HTML: `<h1 style="color:purple;">Create a Nice Header</h1>` (highlighted in blue), `<h3>Subsections</h3>`, and an unordered list with items 'And', 'Bullet', and 'Points!'. The list items are enclosed in `<li>` tags.



# Add a clickable button

- Open HTML editor
- `<a href="LINK" class="btn btn-default">Default</a>` `<a href="LINK"`
- Replace LINK with your website

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DEFAULT

PRIMARY

SUCCESS

INFO

You can customize colors in a button by adding `style=""` into the code. Inside of the quotes, you can add what you are looking to customize.

- Change the background of the button
  - `background-color:purple;`
- changes the color of the font
  - `color:white;`

# Code to create this button

```
<a href="www.google.com" class="btn" style="background-color:purple; color:white;">Button name</a>
```

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# Involve Demo

- Add an image to content field
- Add alt text to the image
- Add a header
- Change the header color
- Add a clickable button

# Repeatable Fields



# Repeatable Field

- Creates a “clean form”
- Clickable “Add” button creates a copy
- User can customize to their own needs

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The screenshot displays a web application interface for 'Cricket University'. The top navigation bar includes links for 'Organizations', 'Events', 'Forms', and 'Opportunities', along with a user profile icon. The main content area features a 'Nomination Form' with a 'SUBMIT' button. A section titled 'Nominee Info' contains two input fields: 'Name' (filled with 'Mason Dixon') and 'Year' (filled with 'Freshman'). An 'ADD' button is positioned to the right of the 'Nominee Info' section, indicating the ability to add more entries to the list.

# Repeatable Field

The screenshot shows a web browser window with the URL `trainingkelsey.presence.io/form/nomination-form`. The page header for 'Cricket University' includes navigation links for 'Organizations', 'Events', 'Forms', and 'Opportunities', along with a user profile icon. The main content area is titled 'Nomination Form' and features a green 'SUBMIT' button. Below the title is a repeatable field section labeled 'Nominee Info' with an 'ADD' button. This section contains two input fields: 'Name' with the value 'Mason Dixon' and 'Year' with the value 'Freshman'. A mouse cursor is positioned over the 'ADD' button.

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# Repeatable Field Set Up

1. Add a **Field Group** to your form.
2. Click pencil to find the **Field Group Settings**
3. Select "Enable Repeatable Fields. You **MUST** enable repeatable fields **BEFORE** adding anything to the field group.
4. Add any fields to your repeatable field group.

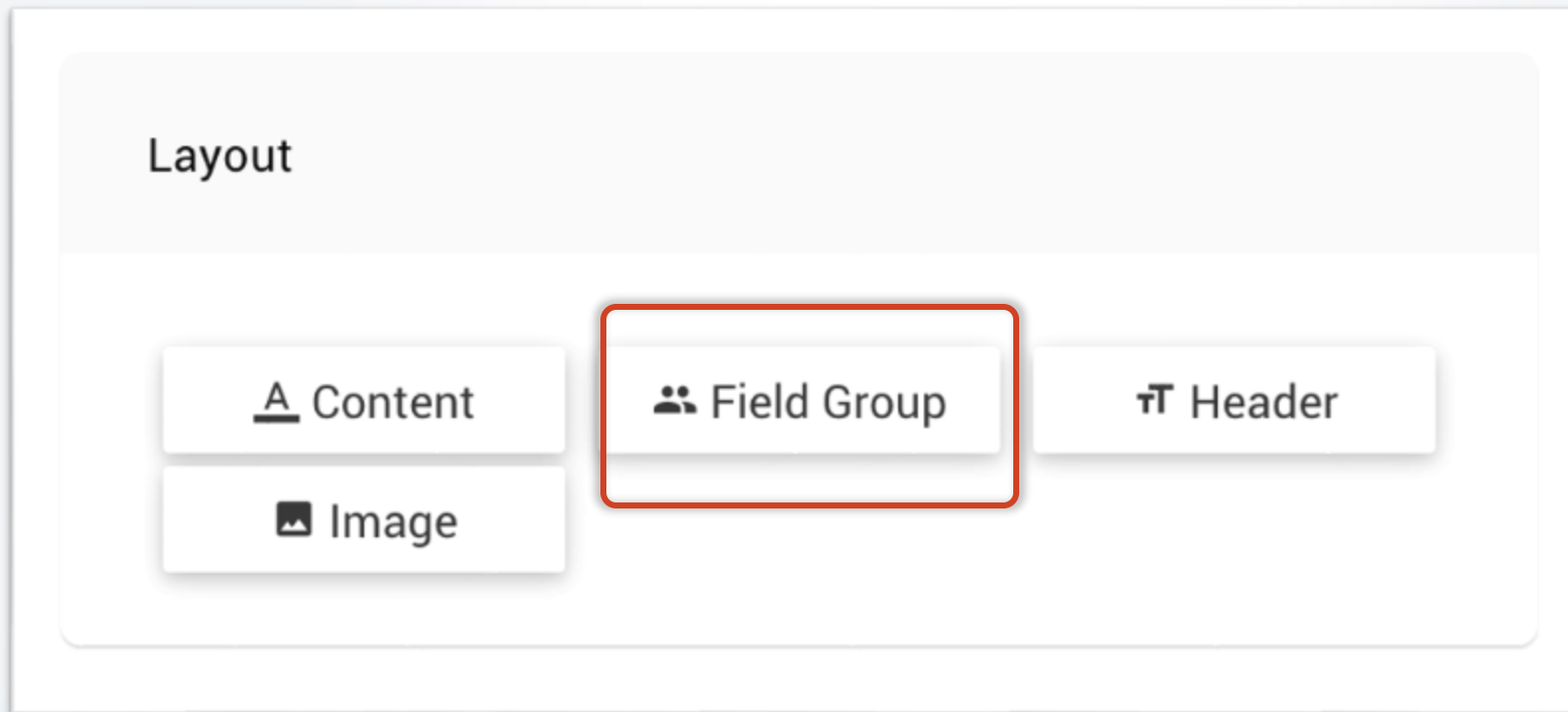
The screenshot shows the 'Field Settings' interface in Modern Campus. At the top is a back arrow and the title 'Field Settings'. Below this is a 'Details' section with a right-pointing chevron. Inside 'Details', there is a 'Field Name' label followed by the text 'Student Leader Awards' which is underlined. Below that is a 'Field Description' label followed by a text input field. Underneath is a 'Field Size' section with four buttons: 'X-SMALL', 'SMALL', 'MEDIUM' (which is highlighted in blue), and 'LARGE'. Below the size buttons is a greyed-out 'Field Group Settings' section with a right-pointing chevron. At the bottom of the settings area is a green checkmark icon followed by the text 'Enable Repeatable Fields'. At the very bottom is a 'Conditionals' section with a right-pointing chevron.

# Repeatable Field Set Up

The screenshot shows a web browser window with the URL `trainingkelsey.presence.io/admin/form/update/nomination-form`. The page has a red header bar with the title "Update Form" and a "SAVE" button. Below the header is a white area with the title "Nomination Form" and buttons for "+ FIELDS" and "SETTINGS". The main content area is a large white grid with a dashed line in the center. In the center of the grid is an illustration of a clipboard with a pencil, a ruler, and a compass. Below the grid, there is text that reads: "Drag fields into the grid and adjust their settings. Add approvals, conditional logic, and more." A "Help" button is located in the bottom right corner of the grid area. On the left side of the browser window, there is a vertical sidebar with various icons: a plus sign, a grid, a document, a group of people, a calendar, a dollar sign, a bar chart, a person, and a speech bubble. At the bottom of the sidebar, there is a gear icon, a red circle with the number 5, and a question mark icon.

# Repeatable Fields Tip

## 1. Must be used on a **FIELD GROUP**



# Repeatable Fields Tip

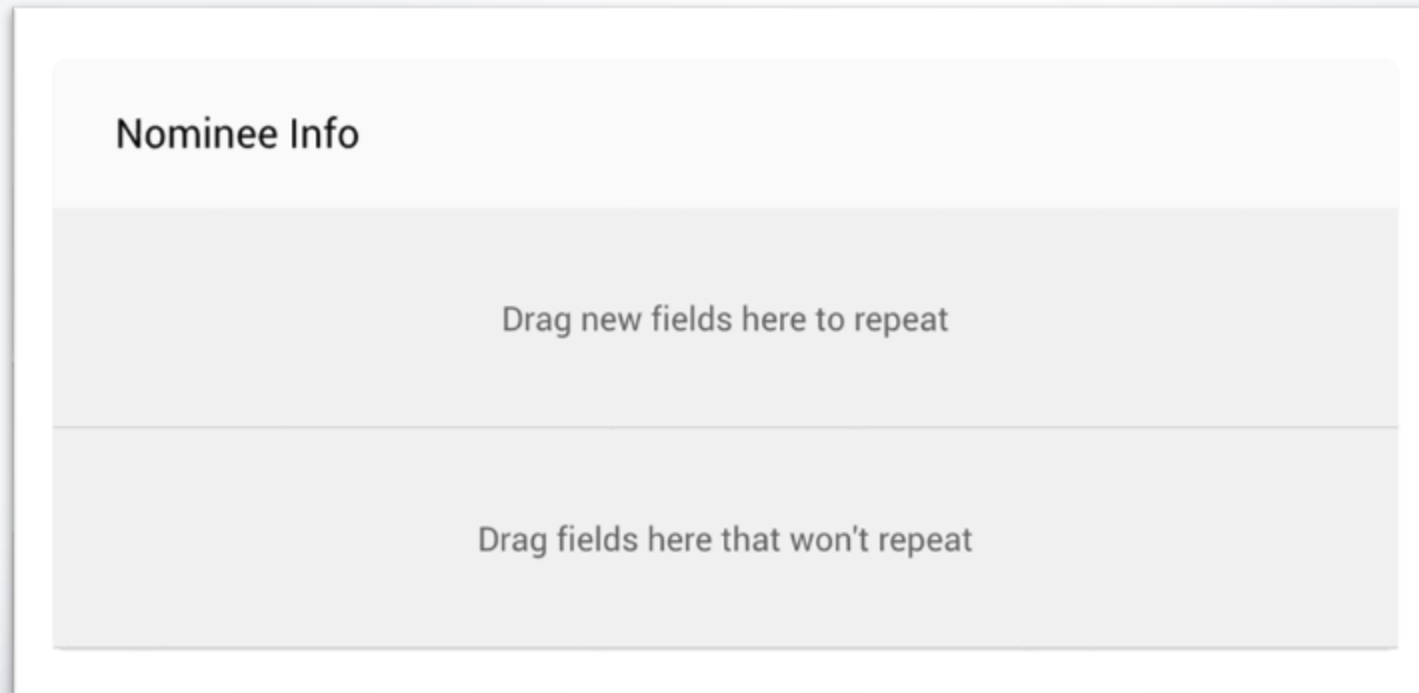
2. You **MUST** turn on repeatable fields for your field group **BEFORE** adding new fields to the section.



Enable Repeatable Fields

# Repeatable Fields Tip

3. When you enable repeatable fields, the field divides into two sections. Fields added ABOVE the line will repeat. Fields added BELOW the line will not repeat.



The diagram illustrates a form layout for a repeatable field. It is titled "Nominee Info" and is divided into two main sections by a horizontal line. The top section is labeled "Drag new fields here to repeat" and the bottom section is labeled "Drag fields here that won't repeat".

# When to use Repeatable Fields

1. Nominate multiple people for the same award.
2. Upload multiple documents.
3. Upload multiple receipts.
4. Apply for multiple roles on the same form.
5. Add multiple date/times you are available.

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The screenshot displays a web form titled "Nomination Form". It features a section labeled "Nominee Info" which contains two input fields: "Name" with the value "Mason Dixon" and "Year" with the value "Freshman". To the right of this section is a small "ADD" button. A mouse cursor is positioned over the "ADD" button, indicating that clicking it will add another instance of the "Nominee Info" section to the form.



What can you put into  
practice TODAY?

# Survey Time!

2 minutes! Thank you so much!

\* 3. Overall, were you satisfied with your training?

☐ Yes

☐ No

\* 4. On the following scale, how **helpful** and **informative** was the training webinar?

1 - Not Helpful

2

3 - Neutral

4

5 - Helpful



Additional comments to reflect your score.

5. Additional feedback? We value your feedback and use it to improve the quality of our training webinars over time.

6. Don't see a session that sparks your interest? Leave us a comment with a topic that we can build a session around in the future!

# Q&A

Please put your questions in the Q&A box.  
I'll get to as many as possible and follow up via  
email if more research is needed!

# Thank You

See you next month!