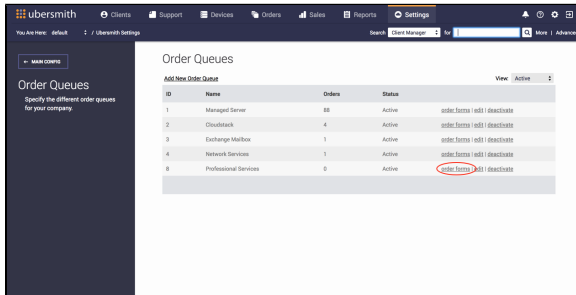


Managing Order Forms

Once you have [added an order form](#), you can perform various actions.

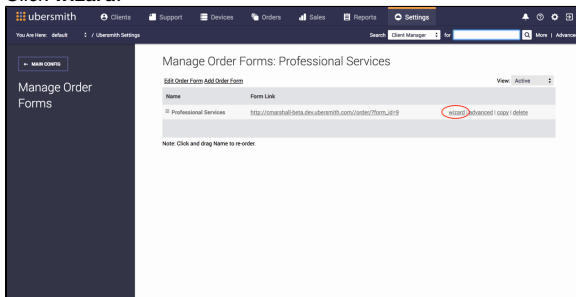
Editing the Order Form with the Order Form Wizard

1. [Access the Order Queues page.](#)
2. Click **Order Forms**.



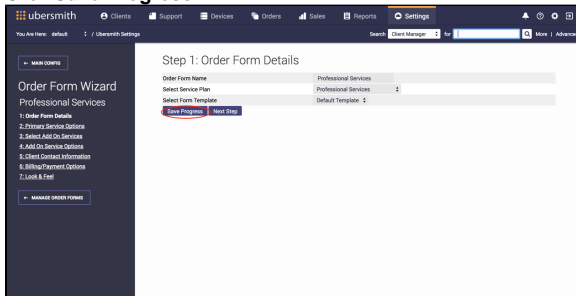
The *Manage Order Forms* page appears.

3. Click **wizard**.



The *Order Form Wizard* page appears.

4. Make any necessary updates you need.
5. Click **Save Progress**.



Editing the Order Form with the Advanced Editor

The Advanced Editor provides greater control to the look and feel of the order form. Once an order form is generated using the Order Form Wizard, you can use the Advanced Editor to add, edit, remove, and rearrange any page or element. You can also add rules to individual elements, such as a required email format, and JavaScript.

Access the Advanced Editor

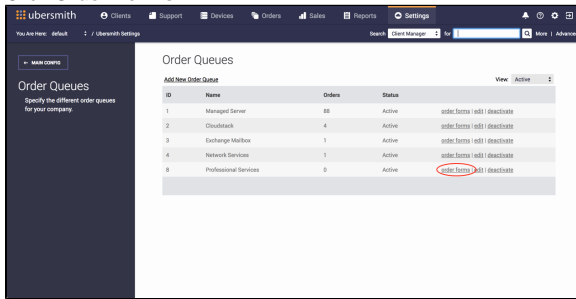
1. [Access the Order Queues page.](#)

On this page:

On this page:

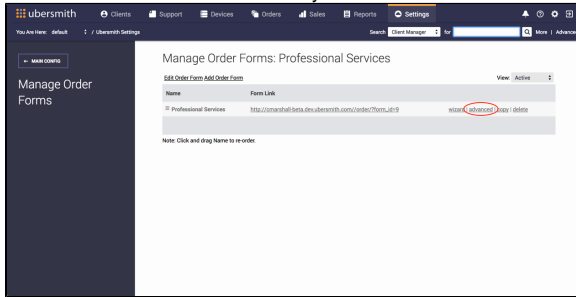
- [Editing the Order Form with the Order Form Wizard](#)
- [Editing the Order Form with the Advanced Editor](#)
 - [Access the Advanced Editor](#)
 - [Adding Pages](#)
 - [Editing Pages](#)
 - [Deleting Pages](#)
 - [Rearranging Pages](#)
 - [Adding Elements](#)
 - [Complete the Element Details Tab](#)
 - [Complete the Extra Attributes Tab](#)
 - [Adding Buttons](#)
 - [Complete the Button Details Tab](#)
 - [Complete the Extra Attributes Tab](#)
 - [Adding Rules to Elements](#)
- [Editing Elements and Buttons](#)
- [Deleting Elements and Buttons](#)
- [Rearranging Elements and Buttons](#)
- [Adding JavaScript](#)
- [Copying Order Forms](#)
- [Deleting Order Forms](#)
- [Related Topics](#)

2. Click **Order Forms**.



The **Manage Order Forms** page appears.

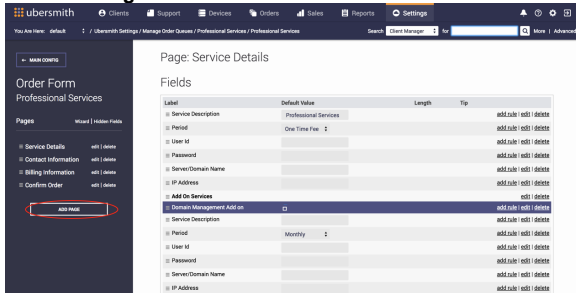
3. Click **advanced** for the order form you want to enhance.



Adding Pages

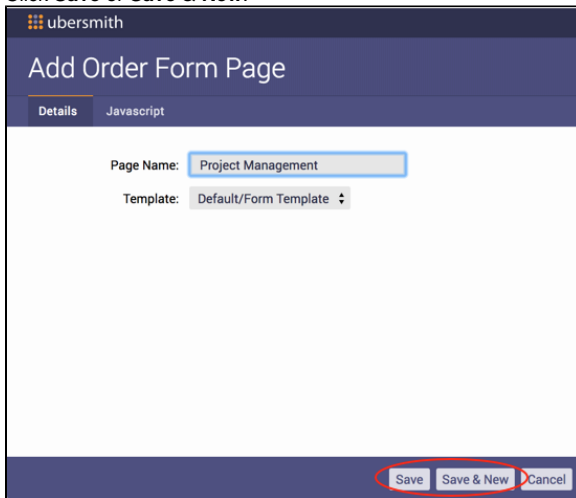
1. [Access the Advanced Editor](#).

2. Click **Add Page**.



The **Add Order Form Page** page appears.

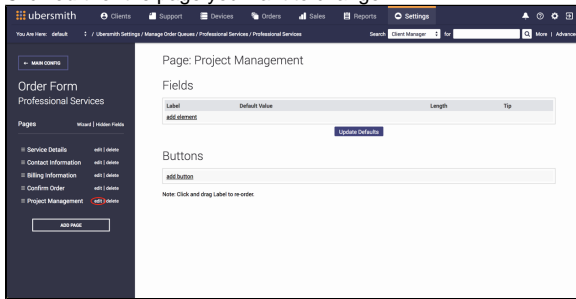
- In the **Page Name** field, enter the name of the order form page.
- In the **Template** field, select the appropriate template to use for the page.
- Optionally, you can add [elements](#), [buttons](#) and [JavaScript](#) to your page.
- Click **Save** or **Save & New**.



Editing Pages

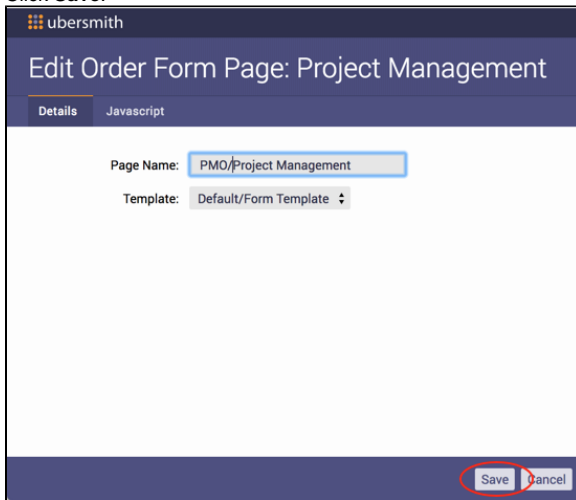
1. [Access the Advanced Editor](#).

2. Click **edit** for the page you want to change.



The *Edit Order Form Page* page appears.

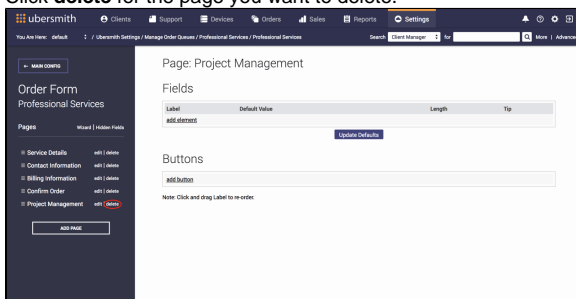
3. Make any necessary changes.
4. Click **Save**.



Deleting Pages

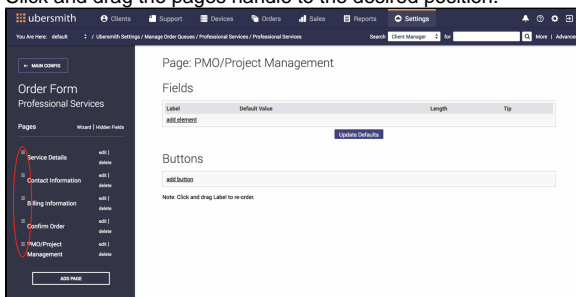
Deleting a page permanently removes it from the order form, along with all form elements that were included in it.

1. [Access the Advanced Editor.](#)
2. Click **delete** for the page you want to delete.



Rearranging Pages

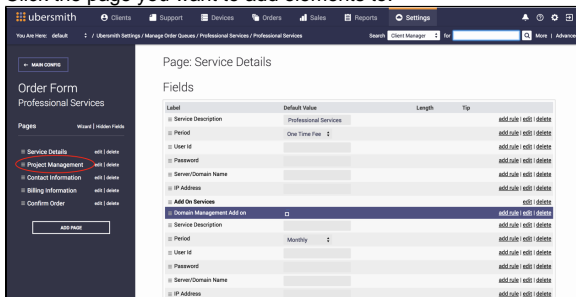
1. [Access the Advanced Editor.](#)
2. Click and drag the pages handle to the desired position.



Adding Elements

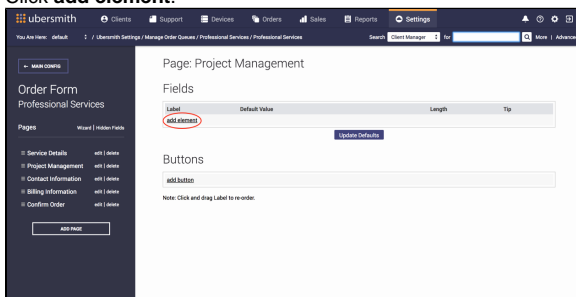
Once the order form pages are defined, form elements need to be added, including all fields that the client will be expected to input, hidden fields, and any static text or HTML that should be displayed as part of the page.

1. [Access the Advanced Editor.](#)
2. Click the page you want to add elements to.



The selected page appears.

3. Click **add element**.



The Add Order Form Element page appears.

Complete the Element Details Tab

1. In the **Element Type** field, select the type of field.
2. In the **Field Name** field, enter the name of the field.
3. In the **Label** field, enter the text to display on the order form.
4. In the **Constant** field, select **Yes** if you want your client to be able to change the input value.
5. In the **Page** field, select the order form page the field belongs on.

Complete the Extra Attributes Tab

1. Click the *Extra Attributes* tab.
2. In the **Attributes** field, enter HTML or JavaScript to further define the element.

3. In the **Tooltip** field, enter the text that appears when a client hovers their mouse over the field.

ubersmith

Add Order Form Element

Element Details **Extra Attributes**

Attributes: appropriate code here

Tooltip: This is a tooltip.

Save Save & New Cancel

Adding Buttons

1. [Access the Advanced Editor.](#)
2. Click the page you want to add buttons to.

ubersmith

You Are Here: default / ubersmith Settings / Manage Order Queue / Professional Services / Professional Services

Pages: **Service Details** add | delete

add field

Page: Service Details

Fields

Label	Default Value	Length	Tip
Service Description	Professional Services		add edit delete
Period	One Time Fee		add edit delete
User id			add edit delete
Password			add edit delete
Server/Domain Name			add edit delete
IP Address			add edit delete
Add On Services			add delete
Service Management Add on			add edit delete
Service Description			add edit delete
Period	Monthly		add edit delete
User id			add edit delete
Password			add edit delete
Server/Domain Name			add edit delete
IP Address			add edit delete

The selected page appears.

3. Click **add button**.

ubersmith

You Are Here: default / ubersmith Settings / Manage Order Queue / Professional Services / Professional Services

Pages: **Project Management** add | delete

add field

Page: Project Management

Fields

Label	Default Value	Length	Tip
add button			

Buttons

add button

Note: Click and drag Label to reorder

The **Add Order Form Button** page appears.

Complete the Button Details Tab

1. In the **Button Type** field, select the type of button.
2. In the **Button Name** field, either enter the name of the button or select the appropriate name. This field is either a text entry or selection based on the button type.

3. In the **Label** field, enter the text to display on the button.

ubersmith

Add Order Form Button

Button Details Extra Attributes

Button Type: Submit Button

Button Name: Next

Label: Submit

Save Save & New Cancel

Complete the Extra Attributes Tab

1. Click the *Extra Attributes* tab.
2. In the **Attributes** field, enter HTML or JavaScript to further define the button.

ubersmith

Add Order Form Button

Button Details Extra Attributes

Attributes: appropriate HTML or JavaScript code here.

Save Save & New Cancel

Adding Rules to Elements

1. [Access the Advanced Editor.](#)
2. Click the page with the element you want to add a rule to.

ubersmith

Page: Service Details

Label	Default Value	Length	Type
Service Description	Professional Service		add rule / edit / delete
Period	One Time Fee		add rule / edit / delete
User Id			add rule / edit / delete
Password			add rule / edit / delete
Server/Domain Name			add rule / edit / delete
IP Address			add rule / edit / delete
Add On Services			add rule / edit / delete
Domain Management Add-on			add rule / edit / delete
Service Description			add rule / edit / delete
Period	Monthly		add rule / edit / delete
User Id			add rule / edit / delete
Password			add rule / edit / delete
Server/Domain Name			add rule / edit / delete
IP Address			add rule / edit / delete

The selected page appears.

- Click **add rule** for the element you want.

Page: Project Management

Fields

Label	Default Value	Length	Tip
Project Management Required?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure		add.button next delete

[add.button](#)

[Update Defaults](#)

Buttons

add.button	next	add.button delete
------------	------	---

Note: Click and drag Label to reorder.

The **Add Order Form Rule** page appears.

- In the **Rule Type** field, select the type of rule you want to add to the element.
- In the **Message** field, type the message that displays to the client if they do not use the correct input.
- Click **Save** or **Save & New**.

Rule Type: Required

Message: Does your order require project management to complete

[Save](#) [Save & New](#) [Cancel](#)

Editing Elements and Buttons

- [Access the Advanced Editor.](#)
- Click the page with the element or button you want to edit.

Rule Type: Required

Message: Does your order require project management to complete

[Save](#) [Save & New](#) [Cancel](#)

The selected page appears.

- Click **edit** for the element you want.

Rule Type: Required

Message: Does your order require project management to complete

[Save](#) [Save & New](#) [Cancel](#)

The **Edit Order Form Element** or **Edit Order Form Button** page appears.

- Make any necessary updates you need.

- Click **Update**.

ubersmith

Edit Order Form Element

Element Details | Extra Attributes

Element Type: **Radio Button Group**

Field Name: **Project Management** [edit](#)

Label: **Project Management Required?**

Options: **Yes**, **No**, **Unsure**

[Update](#) [Cancel](#)

Deleting Elements and Buttons

- Access the [Advanced Editor](#).
- Click the page with the element or button you want to delete.

ubersmith

You Are Here: default / ubersmith Settings / Manage Order Quotes / Professional Services / Professional Services

Order Form
Professional Services

Pages

- Service Details [edit](#) [delete](#)
- Project Management** [edit](#) [delete](#)
- Contact Information [edit](#) [delete](#)
- Billing Information [edit](#) [delete](#)
- Confirm Order [edit](#) [delete](#)

[Add Page](#)

Page: Service Details

Fields

Label	Default Value	Length	Tip
Service Description	Professional Services		add edit delete
Period	One Time Fee		add edit delete
User id			add edit delete
Password			add edit delete
Server/Domain Name			add edit delete
IP Address			add edit delete
Add On Services			add edit delete
Service Description			add edit delete
Period	Monthly		add edit delete
User id			add edit delete
Password			add edit delete
Server/Domain Name			add edit delete
IP Address			add edit delete

The selected page appears.

- Click **delete** for the element you want.

ubersmith

You Are Here: default / ubersmith Settings / Manage Order Quotes / Professional Services / Professional Services

Order Form
Professional Services

Pages

- Service Details [edit](#) [delete](#)
- Project Management** [edit](#) [delete](#)
- Contact Information [edit](#) [delete](#)
- Billing Information [edit](#) [delete](#)
- Confirm Order [edit](#) [delete](#)

[Add Page](#)

Page: Project Management

Fields

Label	Default Value	Length	Tip
Project Management Required?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure		add edit delete

[Update Defaults](#)

Buttons

Label	Default Value	Length	Tip
Submit	next		add edit delete

[Add Button](#)

Note: Click and drag Label to re-order.

Rearranging Elements and Buttons

The order of the elements and buttons in the page is the same order displayed on the order form.

- Access the [Advanced Editor](#).
- Click the page you want to arrange.

ubersmith

You Are Here: default / ubersmith Settings / Manage Order Quotes / Professional Services / Professional Services

Order Form
Professional Services

Pages

- Service Details [edit](#) [delete](#)
- Project Management** [edit](#) [delete](#)
- Contact Information [edit](#) [delete](#)
- Billing Information [edit](#) [delete](#)
- Confirm Order [edit](#) [delete](#)

[Add Page](#)

Page: Service Details

Fields

Label	Default Value	Length	Tip
Service Description	Professional Services		add edit delete
Period	One Time Fee		add edit delete
User id			add edit delete
Password			add edit delete
Server/Domain Name			add edit delete
IP Address			add edit delete
Add On Services			add edit delete
Service Description			add edit delete
Period	Monthly		add edit delete
User id			add edit delete
Password			add edit delete
Server/Domain Name			add edit delete
IP Address			add edit delete

The selected page appears.

- Click and drag that element or button handle to the desired position.

Page: Project Management

Fields

Label	Default Value	Length	Tip
Project Management Required?	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Unsure		add / edit / delete
addButton			add / edit / delete

Buttons

Label	Tip
Submit	add / delete

Note: Click and drag Label to reorder

Adding JavaScript

These are optional fields to add any custom JavaScript to a page. See the [JavaScript](#) site for more information.

- Access the [Advanced Editor](#).
- Create or access the page you want to add JavaScript to.
- Click the [JavaScript](#) tab.
- In the **JavaScript** field, enter any JavaScript to be used at the top of the page, such as defining any functions called by elements within the page.
- In the **onLoad JavaScript** field, enter any JavaScript to run when the page is loaded.

Edit Order Form Page: Project Management

Details **JavaScript**

JavaScript: enter any JavaScript to be used at the top of the page, such as defining any functions called by elements within the page

onLoad JavaScript: enter any JavaScript to run when the page is loaded

Save Cancel

Copying Order Forms

Copying an order form makes a duplicate copy of a form, so you can use the same layout for a different plan without having to start from scratch.

- Access the [Order Queues](#) page.
- Click **Order Forms**.

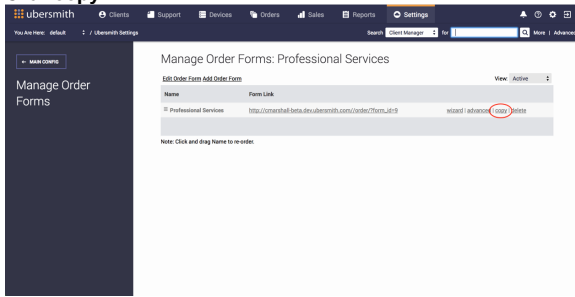
Order Queues

Add New Order Queue

ID	Name	Orders	Status	View	Action
1	Managed Service	0	Active	Order Forms	add / delete
2	Cloudbank	4	Active	Order Forms	add / delete
3	Exchange Mailbox	1	Active	Order Forms	add / delete
4	Network Services	1	Active	Order Forms	add / delete
5	Professional Services	0	Active	Order Forms	add / delete

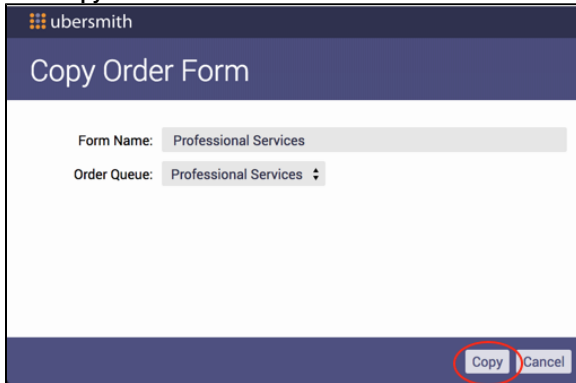
The *Manage Order Forms* page appears.

3. Click **copy**.



The *Copy Order Form* page appears.

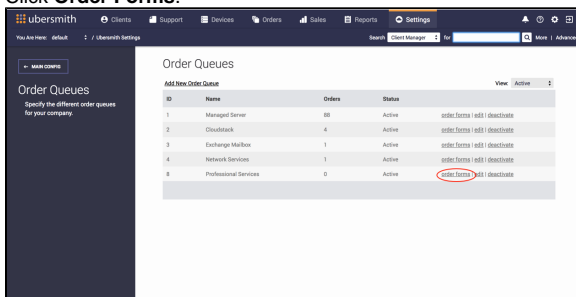
4. In the **Form Name** field, enter the name for the new form.
5. In the **Order Queue** field, select the order queue the new order form belongs to.
6. Click **Copy**.



Deleting Order Forms

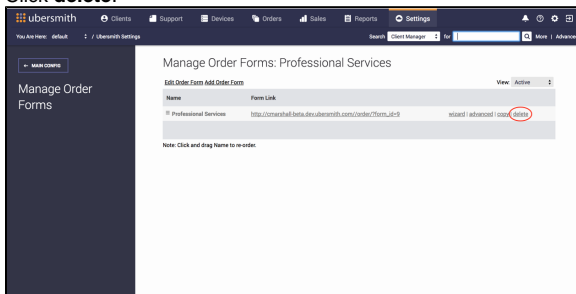
Deleting an order form is permanent, and remove the ability for your clients to order it.

1. [Access the Order Queues page.](#)
2. Click **Order Forms**.



The *Manage Order Forms* page appears.

3. Click **delete**.



Related Topics

[Working With Order Queues](#)

[Adding Order Queues](#)

[Configuring Order Queues](#)

[Managing Order Queues](#)

[Adding Order Forms](#)

[Using the Order Manager](#)