



INDITION FORMS

Setup Guide

Prerequisites, configuration and first publish

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Who this is for

Administrators preparing an Indition site to run Forms: plan entitlements, the domain allow-list that gates embedding, spam protection, email delivery, API-call prerequisites and the operational setup behind stop-point review. Builders can then follow the **User Manual**.

Before you start

Prerequisite	Why it matters
An Indition site with the Forms module enabled	Forms Management appears in the site's navigation once the module is active.
A plan that covers the features you need	Several features are tier-gated (see the plan matrix below).
Site tracking configured with your web domains	The allowed-domains list is what authorizes external sites to embed your forms and accept their submissions.
Outbound email configured	Notification and respondent emails, save-&-resume links and stop-point correspondence all send through the platform's email processing.
Endpoint details for any APIs you will call	URL, credentials or auth API, and the request format the remote system expects.

Plan matrix

Feature availability follows the Indition Forms plan. The gates that most often surprise new sites:

Feature	Minimum plan
Hosted pages and iframe embed	All plans
JavaScript embed (sandboxed, auto-resizing)	Silver
Repeating sections	Silver
Calculated fields, lookup tables, stop points, API-driven options	Gold
API calls / API-populated fields	Per-plan API entitlement
Sensitive-field handling, auto-generated repeating sections	Platinum
PDF / HTML import of existing forms	Platinum / Enterprise

If a tab or option you expect is missing — most commonly the **JavaScript Code** tab under Form Links & Embed Codes, or the stop-point options in a step's Flow group — check the plan first.

Domain allow-list (required for embedding)

Embedded forms are only served to websites you have authorized. The check runs server-side on every embed load and submission, and the embed response also instructs the browser itself to refuse framing anywhere else.

- 1 Open your site's tracking settings and confirm a tracking site exists (it usually does).
- 2 Add every domain that will embed forms — exact hosts (`www.example.com`) or wildcards (`*.example.com`).
- 3 Blocked attempts are recorded in the blocked-domains log with the source page, IP and location, so a missing domain is easy to diagnose.

Without a matching allow-list entry, the embedded form renders “This form is not available on this website” — on your own sites too. Add your production domains before sharing embed codes.

Spam protection

- 1 Enable spam protection per design under **Advanced Designer → Settings**; the form renders a Google reCAPTCHA challenge and the platform verifies it on submission.
- 2 On multi-step forms you can instead (or additionally) require a CAPTCHA on specific steps via each step's *Checks* group — the step will not advance until it passes.

Email delivery

- 1 Confirm the site's outbound email works (any module's test email will do).
- 2 For each form, add processing steps: a notification email to your team and, if wanted, a confirmation to the respondent. Both support field-token personalization.

- 3 If a form uses **save & resume**, its resume link is delivered by email — the address field to use is chosen in the form's save-&-resume settings.
- 4 Stop-point review uses email templates to correspond with applicants — prepare the templates your reviewers will send (document requests, clarification questions, resume links).

Setting up API calls

Before builders wire API processing into forms, collect and verify:

- 1 **Endpoint and method** for each call the forms will make.
- 2 **Authentication**: static credentials to embed in the request, or the details of an auth API that issues tokens (the platform calls it first and passes the token through).
- 3 **Request format** the remote system expects — JSON, name/value pairs, or multipart form data (required if file fields are forwarded).
- 4 **The attribute contract**: which request attributes the API expects, so builders can map form fields onto them; and what the response returns, if fields should populate from it.
- 5 Run one test call from a scratch form and check the **response log** before rolling the configuration into production forms.

Response logs record every call's request and response per submission — they are the first stop for API troubleshooting, and reprocessing re-runs a failed call without asking the visitor to resubmit.

Operational setup for stop points

Stop-point forms add a human queue to your operations; decide these before launch:

- 1 **Who reviews**: which staff work the Stop Point Submissions workspace, and how often.
- 2 **What reviewers may do**: per stop point, whether applicants can edit their step after submitting, whether the step is agent-interactive (staff complete it), and whether reprocessing is allowed.
- 3 **The paused experience**: each stop point's name, destination and on-success message tell applicants what happens next — write them deliberately.
- 4 **Correspondence templates** for the emails reviewers send from the queue.

First form checklist

- 1 Create the form and its fields.
- 2 Create a design; lay out the fields (or *Add All Element Fields*); apply a theme.
- 3 Choose a page template under the design's Settings.
- 4 Add processing: an on-success message and a notification email.

- 5 Publish and open the page link — submit a test.
- 6 Confirm the submission appears in the grid and the notification email arrived.
- 7 If the form uses conditional logic, test each rule path; if multi-step, walk every branch; if it has a stop point, confirm the pause message, the queue entry, and continuation.
- 8 If embedding: add the target domain to the allow-list, paste the embed snippet into the site, and test a submission from there.

Embedding on an external site

From **Form Links & Embed Codes**:

- **Iframe Code** — simplest possible integration; your page controls the frame's size.
- **JavaScript Code** — recommended. One container div plus one script tag; the loader renders the form in a sandboxed frame served by your Indition domain and keeps its height matched to the content automatically — including step changes and conditional reveals. No jQuery or other library is required on the host page.

Both channels serve the same published design, so a change saved in the designer is live everywhere at once. The full feature set — multi-step, save & resume, uploads, payments, CAPTCHA — works embedded.

Operational notes

- **Exports** run against the form's own field set; column choice and date range are per-export.
- **Deleting a form** removes its designs and submissions after confirmation — export first if you need the records.
- **Cloning** copies fields, designs and settings into a new form; submissions are not copied.
- **Reordering steps is locked** once a multi-step form has submissions — finalize flow before launch, or clone to restructure.
- **Logs to know**: blocked/allowed domain logs (every embed request), API response logs (every call per submission), and the stop-point process status (every processing step's outcome, with reprocess).

Troubleshooting quick reference

Symptom	Check
JavaScript Code tab missing	Plan tier (Silver+).
Embed says the form is not available	Allow-list entry for the embedding host; the blocked-domains log names it.
No notification email	The form's processing chain has an email step; site outbound email works.
Step will not advance	Its Checks (CAPTCHA/query validation) or a step API call is failing — the field-level message says which.
API call failing	The submission's response log: request format, auth, endpoint reachability. Fix and reprocess.
Stopped submissions piling up	Reviewers work the Stop Point Submissions queue; continuation is manual by design.
Admin screens look wrong post-upgrade	Hard-refresh to load current assets.