



Gravity Forms Documents

Release 2.8.0

Copyright 2021/07/23

- 1. Quick Setup 3
 - 1.1. Install 3
- 2. Upload and activate 4
 - 2.1. Upload 4
 - 2.2. Activate 5
- 3. Create a Microsoft Word Template 6
- 4. Setup your Form and Field Settings 8
 - 4.1. Setting up the default Settings 9
 - 4.2. Field Settings 11
- 5. Add your Document to a Confirmation 12
- 6. Add your Document to a Notification 13

1. QUICK SETUP

1.1. INSTALL

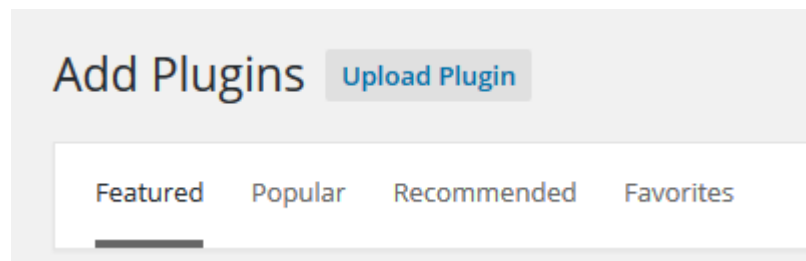
- Upload and Activate the „**Gravity Forms Documents**“ Plugin
- Create a Microsoft Word Document with template fields and save it as DOCX
- Setup a new feed for your form and define the fields to generate a Document
- Define if you need to attach the Document with your notification eMails or confirmations

2. UPLOAD AND ACTIVATE

2.1. UPLOAD

After you downloaded and saved the '**Graviy Forms Documents**' plugin you have to upload it to your Wordpress installation.

Please go to you 'Plugins/Add New' Menu, select 'Upload' from the top links and choose the downloaded ZIP-File at the upload-field.



After selecting the File please press the „Install Now“ Button.

2.2. ACTIVATE

After the Plugin is uploaded you will get a success screen.

Please use the link „Activate Plugin“ to activate the plugin.

Or activate the plugin from your plugin menu.

SP Gravity Forms Documents
[Activate](#)

Use Gravity Forms as Front-End to fill Microsoft Word Documents
Version 1.0.0 | By [Ralf Fuhrmann](#) | [Visit plugin site](#)

3. CREATE A MICROSOFT WORD TEMPLATE

Open your Microsoft Word and create a Document as you like.

For all fields that should be replaced with the data of your Gravity Forms, you have to add a template field like `${fieldname}`.

Example:

[Your Name]
[Street Address, City, ST ZIP Code] | [Telephone] | [Email Address]

[Date]

\${firstname} \${lastname}
\${streetaddress}
\${addressline2}
\${zip} \${city}
\${country}

Dear **\${firstname} \${lastname}**:

[If you're ready to write, select a line or paragraph of tip text and start typing space to the right or left of the characters in your selection.]

Apply any text formatting you see in this letter with just a click or tap on the group.

At the example from the screenshot the fields

`{firstname}`, `{lastname}`, `{streetaddress}`, `{addressline2}`, `{zip}`, `{city}` and `{country}` would be replaced with a value that is submitted with Gravity Forms.

All other 'fields', like `[Date]`, aren't valid for this template processing.

Don't include spaces or special-chars at the template-names.

Please be sure you save the template as an Office Open XML file (DOCX)

4. SETUP YOUR FORM AND FIELD SETTINGS

To generate a templated Document you need to add a new Document feed at the GF Document settings.

The screenshot displays the 'GF Documents Feeds' configuration interface. On the left, a sidebar lists navigation options: Form Settings, Confirmations, Notifications, Personal Data, and GF Documents. The main panel shows a table of document feeds. At the top of the table, there are 'Bulk actions' and 'Apply' buttons, and an 'Add New' button on the right. The table has two columns: 'Feed Name' and 'Template File'. Two feeds are currently active, each with a green 'Active' indicator and a checkbox. The first feed is 'StandardFields' with a template file path of 'C:\xampp\htdocs\wordpress/wp-content/uploads/sites/3/2021/05/example1-1.docx'. The second feed is 'StandardFields - Kopie 1' with a template file path of 'C:\xampp\htdocs\wordpress/wp-content/uploads/sites/3/2021/05/example1.docx'. At the bottom of the table, there are again 'Bulk actions' and 'Apply' buttons.

<input type="checkbox"/>	Feed Name	Template File
<input checked="" type="checkbox"/> Active	StandardFields	C:\xampp\htdocs\wordpress/wp-content/uploads/sites/3/2021/05/example1-1.docx
<input checked="" type="checkbox"/> Active	StandardFields - Kopie 1	C:\xampp\htdocs\wordpress/wp-content/uploads/sites/3/2021/05/example1.docx
<input type="checkbox"/>	Feed Name	Template File

4.1. SETTING UP THE DEFAULT SETTINGS

At the Gravity-Forms Feed Settings you have to setup a name for your.
After this you can upload your Microsoft Word Template Document.

Default Document Fields

Feed Name (Required) ?

Template Filename ?

C:\xampp\htdocs\wordpress/wp-content/uploads/sites/3/2021/05/example1-1.docx

Keine Datei ausgewählt

Document Filename ?

Generate Files ?

Generate DOCX File

Generate HTML File

Feed Condition

Enable Condition

<i>Field</i>	<i>Description</i>
Feed Name	A name for you feed.
Template Filename	Upload your Microsoft Word Template file
Document Filename	The Name of the Output Document without path and without file-extension. It's possible to use the Gravity-Forms Merge Tags. Example: MyNewDocument-{entry:id} Leave this field empty to use an SHA1 coded string.
Generate DOCX File	Create a DOCX File from the Template
Generate HTML File	Create a HTML File from the Template
Feed Condition	Add conditional logic to define, when a feed should be executed

4.2. FIELD SETTINGS

At the “Template Fields” section you can setup the fields of the form that will be used as data to generate the Document.

As from the attached Screenshot at your Wordpress Template the field `{firstname}` will be replaced with the First-Name of the Name field from your form.

Template Fields

Template Fields ?

Key	Value	
SingleLineText	SingleLineText ▼	+ -
ParagraphText	ParagraphText ▼	+ -
DropDown	DropDown ▼	+ -
MultiSelect	MultiSelect ▼	+ -
Number	Number ▼	+ -
Checkboxes	Checkboxes (Selected) ▼	+ -
RadioButtons	RadioButtons ▼	+ -
Hidden	Hidden Field ▼	+ -

5. ADD YOUR DOCUMENT TO A CONFIRMATION

At the default Gravity Forms Confirmation Setting you can use two new Merge-Tags to insert the generated Documents to your Confirmation.



Merge Tag	Description
{DOCX FILE: xxxx}	Will be replaced with the name of the generated Document DOCX file for this feed.
{DOCX URL: xxxx}	Will be replaced with the URL of the generated Document DOCX file for this feed.
{HTML FILE: xxxx}	Will be replaced with the name of the generated Document HTML file for this feed.
{HTML URL: xxxx}	Will be replaced with the URL of the generated Document HTML file for this feed.

6. ADD YOUR DOCUMENT TO A NOTIFICATION

At the default Gravity Forms Notification Setting you can attach the generated Document files as attachment to the Notification eMail.

Gravity Forms Documents
StandardFields ?
<input checked="" type="checkbox"/> Add a DOCX Document to the Notification
<input type="checkbox"/> Add a HTML Document to the Notification

Gravity Forms Documents
StandardFields - Kopie 1 ?
<input checked="" type="checkbox"/> Add a DOCX Document to the Notification