FORM CHEX™ (for Keap forms)

FORM CHEX™ from Detati Communications, Inc. is a Wordpress plugin for pre-filtering and eliminating spam and bot submissions received through Keap forms that get posted to the Keap CRM.

Features:

• Checks field types for proper formatting

• Checks that the form submission is coming from client website/IP

• Hides Keap form ID and secret from scrappers and bots

• Only submits when all form data is checked

• Uses the hml code from the Keap form to generate new form code that is managed by FORM CHEX

• Ability to add additional styling/CSS code

• Works on your website and server, no information is sent to a third party.

PLEASE NOTE:

Unstyled HTML code from Keap is required for this plugin to work, it does not work with Javascript snippets.

Updating a form within Keap will not automatically update it on your web page or within the FORM CHEX plugin. The "unstyled HTML" code needs to be copied and re-translated each time there is a change. The shortcode will not need to be updated on the web page however.

Converting Existing Forms

New/duplicate forms will need to be created in order for this to work. Forms that are currently on your website and have been compromised will still receive spam submissions if live in Keap. Once a form ID has been identified by spammers, it can still be submitted directly without using the form. In order to prevent spam from existing forms, they will need to be duplicated in Keap so they have a NEW form ID that has not been compromised. Old forms should then be deactivated or deleted within KEAP to prevent spam from being sent using that form ID.

Please note that if your plugin expires and is not active, your forms will be compromised. Even if the plugin is renewed, the forms will need to be duplicated to set a new form ID if the plugin was not actively working for any amount of time.

Form Field Validation

Currently the Keap form fields that are validated include the most common contact fields:

• inf_field_FirstName

• inf_field_LastName

• inf_field_Email

• inf_custom_CompanyName

• inf_field_Phone1

If you are are using custom fields, or Keap fields other than then those listed above, they will not be validated and are only checked if empty when required. Because spammers use common contact fields such as name and email, our plugin only validates these few fields. The plugin currently does not validate custom fields. Forms only custom fields will still be protected by hiding the form ID, but there will be no data validation for those fields, except the check for empty required fields.

Plugin Installation

FORM CHEX is licensed for use on ONE domain only. If you need to move the plugin to a different site, you can login into oyour account at **detatiapps.com/account-login** and update the URL.

Once purchased and downloaded, install the FORM CHEX plugin as you would any other plugin. Go to the "Plugins" page in Wordpress and click on the "Add New" button.

Upload the .zip archive and activate.

After installation and activation, you should see Form Chex listed on the left side menu, with three sub items.
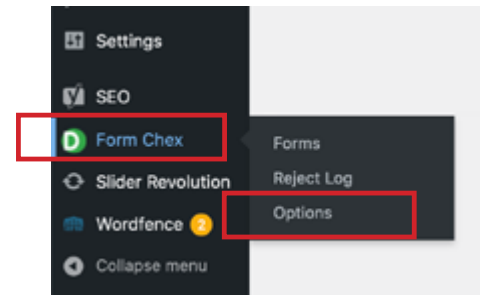
DO THIS FIRST!

Select "Options" to enter your license key, then click Save, and then Activate. You should see the active license information.

Note: If you publish forms on a live website BEFORE license activation, they will not be protected. Your forms will still work with the plugin deactivated or inactive license, however there will be no validation checks and form ID masking.
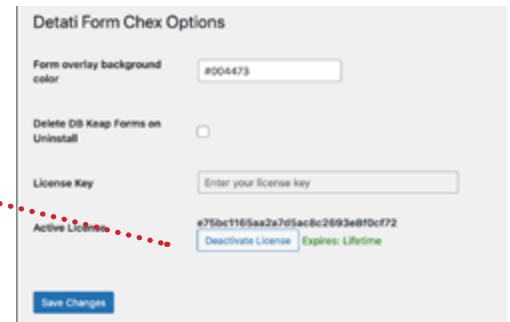
If the Plugin is deactivated or forms are published on a live site, you will have to duplicate or recreate the form in Keap with new Form ID numbers, retranslate in FORM CHEX and update the shortcode on your website to make it work again. Once your form ID is compromised, just reactivating will not stop spam from being submitted.

Quick reference to the sub menu items:

Forms

This is where you translate and manage your forms

Reject Log

This is a list of submissions that did not pass the "check" and includes some basic information on the attempted submission

Options

This is where you enter (and activate an deactivate) your license key, can change the overlay color and enable all form deletion when uninstalling the plugin.

Details on the subsections

Form Chex -> Options

Form overlay background color defines the overlay color used to create a the semi-transparent overlay covering the form when a visitor clicks the button to submit the form. This prevents input fields from being changed while the form data is being posted (which can produce unpredictable post data) and from the form submit button being clicked multiple times (which can cause multiple posts). The overlay indicates that something is processing.

The Delete DB Keap Forms on Unistall is unchecked by default. This allows you to deactivate or update your plugin without losing your forms and data. If this is checked, when you deactivate and delete the plugin, all the form data wil also be deleted.

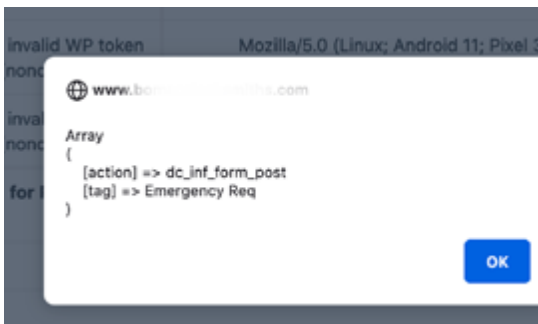**Requires an activated license to work. Make sure you have a valid license and it is activated.**

Form Chex -> Reject Log

This page lists submissions that have been rejected. It provides some basic timestamp and IP information and the reason for the rejection. The Post Array column is clickable and gives a bit more detail on what form data was submitted.

Form Chex -> Forms

This page lists the Keap forms which have been configured for the website. You can add new forms, manage or edit existing forms.

- To **add** a form, use the "**Add Form**" button.
- To **edit** a form, click on the **yellow pencil icon** in the same row as the form to edit.
- To **delete** a form, click on the **red circle icon** in the same row as the form to delete. Multiple deletions can be performed using the checkboxes to the right and then "Delete" link at the bottom of the list.

Adding and Posting Forms to your Website

Add Form / Update Form

Clicking "Add Form" will display a new form page. Here is where you would add a "new" form.

Choose a unique tag for your form. The tag is case insensitive, use only lowercase characters, dashes and underscores to avoid potential problems. Special characters are not allowed. Keep it fairly short.

Determine if you want to log any posts flagged by the AJAX server and by checking the "Log Rejects" checkbox. Checking this box shouldn't result in excessive logging.

Login to your Keap account and create or find the form you want to add. Copy the **HTML code (unstyled)**.

Paste into into the "HTML from Keap" text area on the **left side**.

Keap automatically attaches 'placeholder' attributes to each form field. If these are unwanted, you can check the "Remove placeholder attributes" checkbox below the textarea to have these removed during translation.

Next, choose what you want to happen after a form is posted.

- You can use the "Redirect URL" pull down to select a web page to redirect to after the form is submitted. Make sure you have created your redirect page first so it will appear on the list of available pages.

If you want the user to stay on the same page, but just want to have the form replaced with a response message, type your text or HTML response message into the "Message HTML" text area. This text/HTML will be used to replace the form input elements if the form data posts successfully. You can use HTML syntax in this message.

Note: Directives entered in the Keap app when you are building your form will be ignored — such as redirect to a Thank you page — the plugin directives you set using "Redirect URL" and "Message HTML" will be used instead.

CAUTION: You can also make manual edits to the HTML in the "HTML from Keap" text area **prior** to translating or saving (or in the translated HTML text area after translation — BUT you will need to save again.)

Edits made after translation will be overwritten if you hit "Translate" again.

NOTE: if you are using a theme, the theme styling should apply to the form elements. If not you can add inline CSS or set up a CSS style sheet for the class elements. Keap styling does not usually completely transfer over.

You're now ready to translate the Keap HTML form coding to the HTML that will be inserted into the page or pages on your Wordpress website.

• **Click "translate."**
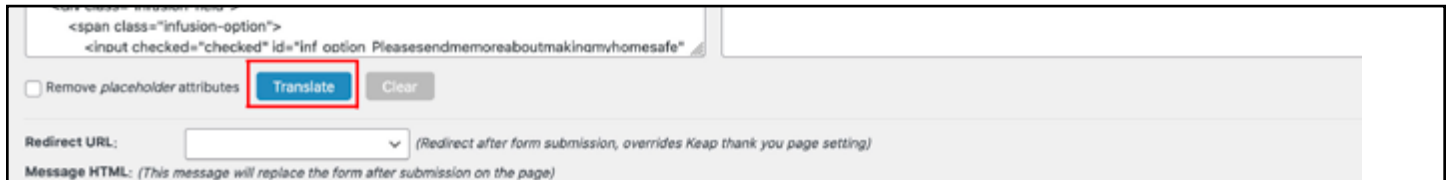
When you click the "Translate" button, the "Translated HTML" text area will be filled with the translated HTML code.

If an error occurs, the most likely cause is invalid HTML in the "HTML from Keap".

The "Form URL", "Form ID", "Form Name" and "Keap Version" fields above the text areas should also now have values. If any are missing, make sure all the hidden input element text fields were copied correctly from the Keap App.

"Form URL" comes from the 'action' attribute of the <form> element, "Form ID" comes from the 'value' attribute on the <input name="inf_form_xid"> element, "Form Name" comes from the 'value' attribute on the <input name="inf_form_name"> element and "Keap Version" comes from the 'value' attribute on the <input name="keap_version"> element. Once translated, you can make manual edits to the translated HTML. The word Modified will appear in red below the translated HTML if manual changes have been made. This is to reminder and warning that re-translating will overwrite your manual changes.
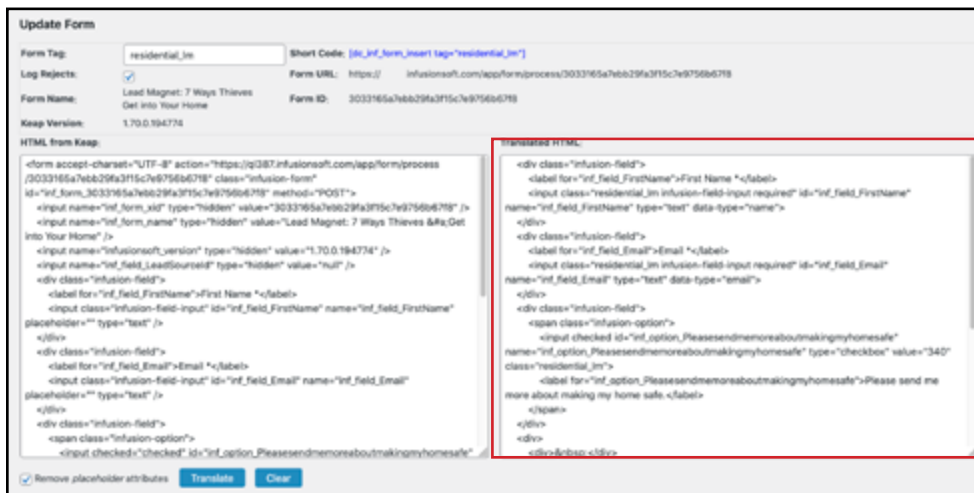
This is the code that that the shortcode will use on the page

Finally, be sure to "Save" or "Update" the translated form record to the database.

Adding forms to Wordpress pages

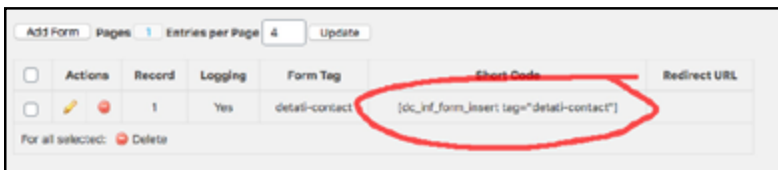Forms are inserted into Wordpress pages using a **shortcode**. The shortcode uses an attribute called "tag" to identify the form by the Form Tag that was assigned when the form was translated on the Add Form page. The shortcode can be found at the top of the page to the right of the Form Tag.
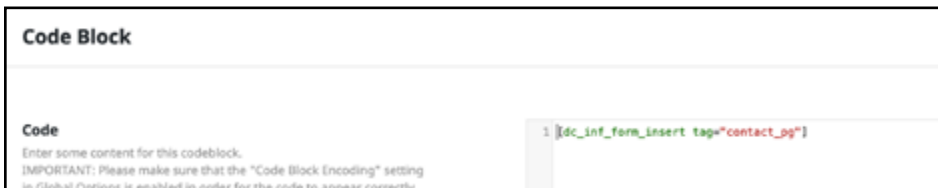
Update Form			
Form Tag:	residential_lm	Short Code:	[dc_inf_form_insert tag="residential_lm"]
Log Rejects:	☑	Form URL:	https:// infusionsoft.com/app/form/process/3033165a7ebb29fa3f15c7e9756b67f8
Form Name:	Lead Magnet: 7 Ways Thieves Get Into Your Home	Form ID:	3033165a7ebb29fa3f15c7e9756b67f8

It will also appear on the main form list pag

Add Form	Pages	1	Entries per Page	4	Update		
☐	Actions	Record	Logging	Form Tag	Short Code	Redirect URL	
☐	✏️ 🔴	1	Yes	detati-contact	[dc_inf_form_insert tag="detati-contact"]		
For all selected: 🔴 Delete							

Cut and paste the entire shortcode (including the open and close brackets) onto your web page.

Depending on your theme or page editor, you might need to add this into a Code Block. When Wordpress generates the page, it will encounter the shortcode and insert the translated HTML for the form onto the page.

Code Block		
Code		1 [dc_inf_form_insert tag="contact_pg"]
Enter some content for this codeblock. IMPORTANT: Please make sure that the "Code Block Encoding" setting in Global Options is enabled in order for the code to appear correctly.		

The shortcode won't change unless you change the Form Tag name. Simply updating the FORM CHEX code or manually editing will not affect the shortcode. so you would not need to update on the web page.

Button Styling

Keap forms as unstyled html does not honor the button styling, so here is a basic style snippet that can be added either before or after translating. Change any of the paramenters you like (bolded code) or create your own CSS.

The code from Keap without the captcha on would look something like this:

```
<div class="infusion-submit"> <button style="width:140px; height:35px; margin-top: 20px; background-
color:#f4c700; color:#000000; font-size:16px;  border-color:#A9A9A9;  border-width:0px; -moz-border-
radius:6px;border-radius:6px;" type="submit" data-group="your_form">Submit</button> </div>
```

With the captcha on you must include the captcha ID within the button class:

```
<div class="infusion-submit"> <button style="width:140px; height:35px; margin-top: 20px; background-
color:#f4c700;color:#000000; font-size:16px; border-color:#A9A9A9; border-width:0px; -moz-border-
radius:6px;border-radius:6px;" class="infusion-recaptcha" id="recaptcha_1251dffebeb10e911bbf5c54836fdb3d"
type="submit">Submit</button> </div>
```

Support

Please use our short form to contact us via email. We strive to respond as quickly as we can to all inquiries.