# Understanding online form steps

You can assign steps to your submitted online forms. **Steps** are specific tasks that need to be completed for each form.

For example, you might create the following **Steps** for an adoption form:

- Review form by adoption counselor
- Interview applicant
- Vet Check
- References Check
- Home Visit

You can create as many **Steps** as you want, and then mark them off as they are completed. Each step can be marked with a **Status**, such as **Pass** or **Fail**. Your organization can take **Pass** to mean completed, and **Fail** to mean you've skipped it, or the applicant declined to proceed. For instance, if you have "Vet Check" as a step, and the applicant does not currently have a pet, you can mark it Fail, but make a comment that no vet is available to talk with. By marking the step **Fail**, you highlight that step for another volunteer who might be interviewing the applicant later.

> **Where do I find it?**
>
> You can find the Online Forms Steps page by going to **Features > Online Forms** and clicking the **Steps** button.
>
> 
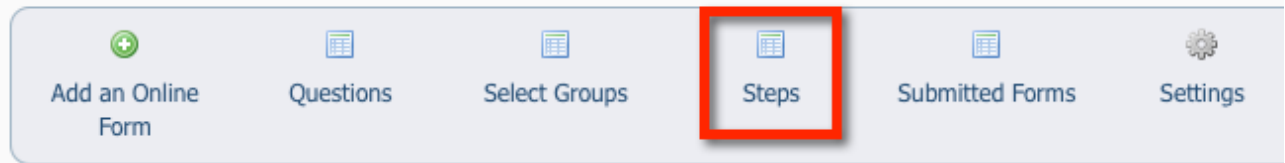
**On this page:**

- Adding steps to online forms
    - Changing the order of online form steps
    - Removing a step from an online form
- Changing the status of a step on a submitted form
- Deleting an online form step for a submitted form

# Adding steps to online forms

Once you have created and added some forms, you want people to fill out the forms. When they do, you need to manage the processing of the forms, and using **Steps** is a good way to do so.

Follow these instructions to add a step to a form, for instance, to an adoption application form. These instructions add that step to every adoption application that is filled out and submitted from that point on.

1. From the list of your online forms (**Features > Online Forms**) click the number under the heading **Steps** next to the form for which you you would like to add the steps.



2. Click the **Add a Step to this Form** button.



3. Next to **Step** in the resulting page, select the step from the drop-down list of steps.
4. Next to Order* select the order the step should appear from the drop-down list.
   **NOTE:** You can also click the green **Add** icon to add additional steps for you to select.
5. Select the **Add Another** check box if you will be adding additional steps to this form.
6. Click **Save Step to Online Form**.



## Changing the order of online form steps

You can change the order in which steps should be completed.

To change the order of completion, open the form from the list of online forms, select the number next to the form under the heading **Steps,** and use the gray arrows on the left to move steps up or down to change their order.



## Removing a step from an online form

You can remove steps from online forms by using the **Actions** menu in the list of steps:

Open the form from the list of online forms, select the number next to the form under the heading **Steps,** then tick the checkbox next to the step you want to remove. From the **Actions** drop-down menu, select **Remove**.



## Changing the status of a step on a submitted form

When a step is completed to your satisfaction for a submitted form, you can mark it as **Pass** from the list of submitted forms

To change the status of a step on a specific submitted form:

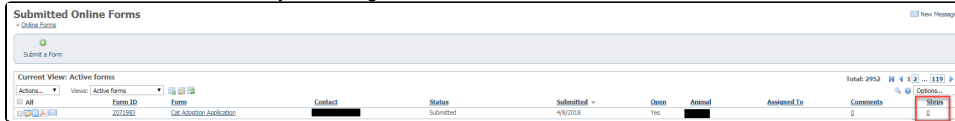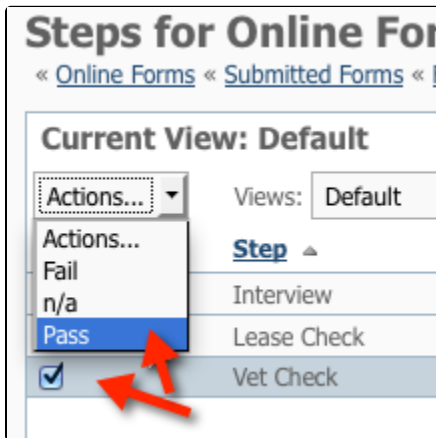1. Navigate to the list of **Submitted Forms** (**Features > Online Forms** and then click the **Submitted Forms** button).
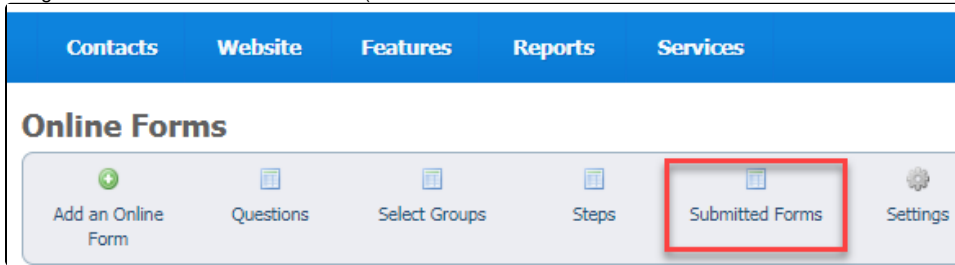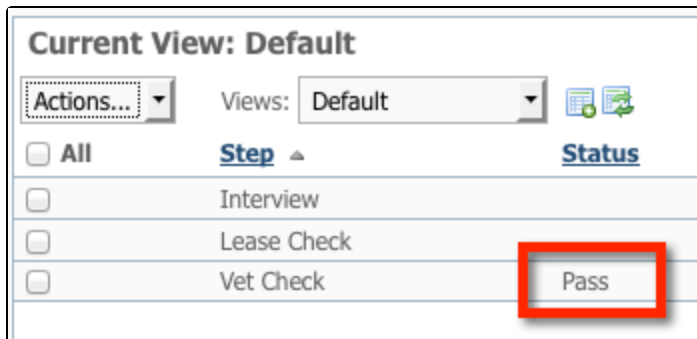


2. Scroll down to the form for which you want to change the status of a step.
3. Click the number under the **Steps** heading.



4. Select the checkbox next to the step, then from the **Actions** drop down, select **Pass** or **Fail**.



When the steps for this form are viewed, the status for each step will display under **Status**.



The number of Steps for the form will show on the **Forms Status** page, along with the percentage of steps that have passed (like "1 / 2 100% Pass," which means that one out of two assigned steps have been completed, and 100% of the completed steps have passed).
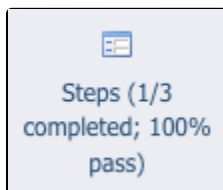


# Deleting an online form step for a submitted form

If you want to delete a step for a specific submitted form, you can do so. For instance, perhaps you are adopting to a previous adopter who has completed a new form. You want to skip the home visit. It's easy to delete that step:

1. Find the specific submitted form from the list of submitted forms.

2. Click the number under the heading **Steps** for that form.
3. Click the checkbox next to the name of the step.
4. Select **Delete** from the drop-down menu under **Actions**.
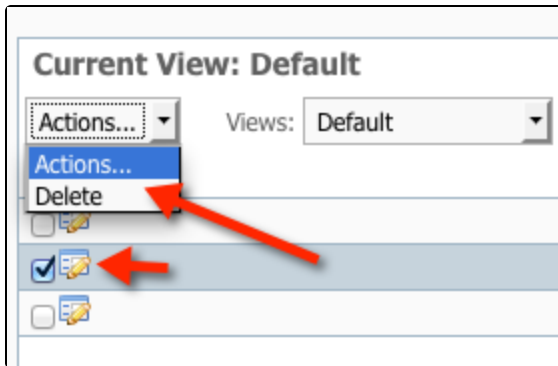


Popular Questions

Topics:

- animals
- animal
- form

1. 0
   votes

   **Linking support for an animal to payment**
   - **0** answers
   - Andrea Homan
   - Apr 24, 2024
   - animals

2. 0
   votes

   **How do I get my listings to automatically feed to Facebook?**
   - **2** answers
   - Jennifer Myers
   - Mar 20, 2024
   - animals
   - website
   - exports
   - facebook
   - iframe

3. 0
   votes

   **How can we embed our available or adopted animal data stored in RescueGroups.org for display on an external website service?**
   - **4** answers
   - Whiskers & Tails Rescue Foundation
   - Sept 21, 2023
   - Space: Website Service Guide
   - website
   - exports
   - animals
   - toolkit

4. 0
   votes

   **My Animal List is empty**
   - **2** answers
   - Tammy Mullins
   - Feb 06, 2024
   - animals

5. 0
   votes

   **Requests**
   - **0** answers
   - Anita Lowman
   - Feb 19, 2024
   - requests
   - animals

6. 0
   votes

   ## Add a mixed breed choice for dogs
   - **1** answer
   - Richard [RG]
   - Feb 27, 2014
   - requests
   - animals
   - breeds
   - exports

7. 0
   votes

   ## Change default location to "no"
   - **1** answer
   - Alana Woodbury
   - Jan 22, 2024
   - animals
   - exports

8. 0
   votes

   ## What fields is the Asilomar Advanced Animal Statistics report pulling from
   - **0** answers
   - Alana Woodbury
   - Jan 20, 2024
   - animals

9. 0
   votes
   status

   ## Is there a way to view relationship from the Animal List page?
   - **1** answer
   - Michelle Caylor
   - Dec 08, 2023
   - animals

10. 0
    votes
    status

    ## Can we increase the information exported to Adopt-A-Pet to include relationships?
    - **1** answer
    - Michelle Caylor
    - Dec 08, 2023
    - animals
    - exports

**Have a question about this topic?**