

Creating embedded form with ConfiForms to send emails directly from Confluence



In this tutorial we will create a simple embedded form and show how to use IFTTT macro to send emails based on the data entered into the form



If you are new to ConfiForms, please take a few minutes to read the [Basic concepts](#) Guide, or go through the video tutorial on that page. 😊

Let's start with form definition. You will need the following macros:

- ConfiForms Form (Definition) - the main container for your form
- ConfiForms Registration Control
- ConfiForms Field Definition - we will have 3 of these, one for *recipient* field, one for *title* and another one for *message body*
- ConfiForms IFTTT Integration Rules macro - to define when and how we will send an email based on the data entered into the form

Here is how the form definition looks like

```
CONFI: ConfiForms Form | formName = mailman | registrationFormTitle = Send email | saveButtonLabel = Send

CONFI: ConfiForms Field Definition | fieldName = recipient | fie...

CONFI: ConfiForms Field Definition | fieldName = title | fieldLa...

CONFI: ConfiForms Field Definition | fieldName = messageBody | f...

CONFI: ConfiForms Registration Control | embedded = true
```

- *recipient* field definition is of type text
- *title* field definition is of type text
- *messageBody* field definition is of type textarea

"ConfiForms Registration Control" macro defines how the form definition should be shown: embedded or as dialog, with custom layout or not (with standard, card view - which is the default)

As we want to make the form embedded to the page we shall set "embedded" parameter to true for "ConfiForms Registration Control" macro, like this:

Edit 'ConfiForms Registration Control' Macro

Add/Register button for ConfiForms dynamic forms [Documentation](#)

ConfiForms Form name

Required when macro is used stand-alone (not within a ConfiForms Form macro)

Page name where the form is defined

Leave blank if the form is defined on the same page

☒ Embedded or Dialog mode? *

Check this option if you want to have your form embedded on the page, uncheck if you want your form as a dialog

Label for Registration button *

Preview

Send email

Recipient

Title

Message body

Select macro

Now we shall define the IFTTT macro to listen to the event when a record in the form is created and send an email based on the data entered.

The screenshot shows the ConfiForms configuration interface. At the top, there's a header bar with the text "CONF: ConfiForms Form | formName = mailman | registrationFormTitle = Send email | saveButtonLabel = Send". Below this, there are three configuration blocks: "CONF: ConfiForms Field Definition | fieldName = title | fieldLa...", "CONF: ConfiForms Field Definition | fieldName = messageBody | f...", and "CONF: ConfiForms Registration Control | embedded = true". At the bottom, there's a section labeled "{ ift" with a dropdown menu showing "Macro suggestions". The dropdown menu has two options: "CONF: ConfiForms IFTTT Integration Rules" (highlighted in blue) and "Open macro browser".

Here are couple of screenshots to show how this is done:

The screenshot shows the "Insert 'ConfiForms IFTTT Integration Rules'" dialog box. It has a title bar with the text "Insert 'ConfiForms IFTTT Integration Rules'". Below the title bar, there's a text area with the text "If empty then IFTTT action is always executed when an event is occurred. [Same syntax as in filters](#)". Below the text area, there's a section labeled "Subject for email message" with a text input field containing "[entry.title]". Below the input field, there's a text area with the text "Could be constructed dynamically. You can reference record owner as [owner]; record modifier, as [modifier]; any record field as [entry.FIELD_NAME]". Below the text area, there's a section labeled "Participants" with a text input field containing "[entry.recipient]". Below the input field, there's a text area with the text "Record owner could be referenced as [owner], Record modifier, as [modifier]. To reference field value use: [entry.FIELD_NAME]". Below the text area, there's a section labeled "Sender" with a text input field.

As you can see, we set [entry.recipient] as Participants parameter. This will resolve into entered email (or emails, if a user provides a comma separated list of email addresses).

You can put a confluence user name (or group) as well if necessary. Please note that when you put a group each user who is in the group is resolved and her email is extracted, for large user groups it might be time consuming (Important to know: there is a hard limit of 120 seconds for macro rendering which puts Confluence!). Please avoid sending mass-emails using IFTTT macro.

We make references to Form fields in IFTTT macro parameters

Via [entry.field_name] notation

The screenshot shows the ConfiForms configuration interface. At the top, there's a header bar with the text "CONF: ConfiForms Form | formName = mailman | registrationFormTitle = Send email | saveButtonLabel = Send". Below this, there are three configuration blocks: "CONF: ConfiForms Field Definition | fieldName = recipient | fie...", "CONF: ConfiForms Field Definition | fieldName = title | fieldLa...", and "CONF: ConfiForms Field Definition | fieldName = messageBody | f...". Below these blocks, there's a section labeled "CONF: ConfiForms Registration Control | embedded = true". At the bottom, there's a section labeled "CONF: ConfiForms IFTTT Integration Rules" with the text "event = onCreate | action = Send Email | title = [entry.title] | who = [entry.recipien... | [entry.messageBody]".

Alternative via ConfiForms Field macro

The screenshot shows the ConfiForms configuration interface. At the top, there's a header bar with the text "CONF: ConfiForms Form (Definition) | formName = mailman | registrationFormTitle = Send email | saveButtonLabel = Send". Below this, there are four configuration blocks: "CONF: ConfiForms Form Field (Definition) | fieldName = recipient | Se...", "CONF: ConfiForms Form Field (Definition) | fieldName = title | fieldLa...", "CONF: ConfiForms Form Field (Definition) | fieldName = messageBody | f...", and "CONF: ConfiForms Form Field (Definition) | fieldName = anyattachment | ...". Below these blocks, there's a section labeled "CONF: ConfiForms (Form View) Registrations Control | embedded = true". At the bottom, there's a section labeled "CONF: ConfiForms IFTTT Integration Rules" with the text "event = onCreate | action = Send Email | title = [entry.title] | who = [entry.recipien... | [entry.messageBody]".



Please see the following if the [entry.messageBody] continues to autocomplete

[https://wiki.vertuna.com/display/CONFIFORMS/ConfiForms+FAQ#ConfiFormsFAQ-WhyintheeditorIgetautolinksinsteadof\[entry.field_name\]notations](https://wiki.vertuna.com/display/CONFIFORMS/ConfiForms+FAQ#ConfiFormsFAQ-WhyintheeditorIgetautolinksinsteadof[entry.field_name]notations)

and we reference "messageBody" field in the IFTTT macro body. This will be used as email message body (substituted with the value entered before sending the email)

And here is how the form looks like on the Confluence page

Send email

Recipient

Title

Message body

Of course we can add some validations to the fields, set them as required and much more. But this is out of the scope of current tutorial.



If you want to learn how to include ConfiForms File Fields as attachments into the email then there is a small add-on tutorial to look at: [Sending an email with attachments from Confluence with ConfiForms app](#)