

Post v1.0 improvements

Post v1.0 improvements

Contact Form Recipe Track Lead

Contact Form Recipe Track Lead

Figma board:

<https://www.figma.com/board/KlR8D7gMBb3LHG1QzHIjHj/CMS-Research-%26-Contact-Form?node-id=60-364&t=QbbVkfVuPyWRCz77-1>

Dropbox video of Square Space onboarding:

<https://www.dropbox.com/scl/fi/jo551kzgeng3k15t1rf14/square-space-signup-and-walkthrough.mp4?rlkey=q3pd9r15a79baw0u24dn1cg4f&dl=0>

To Do's

- ☒ Sort out contribution credits with Lenny
- ☒ Get the initial code to be accepted and merged
- ☐ Propose a logo icon for Project Browser
 - ☐ This seems to be the requirements, I will dig deeper to find them:
https://www.drupal.org/project/project_browser/issues/3360048
 - ☐ More conversation here but I believe this all means the icons have been put on HOLD <https://www.drupal.org/project/drupal/issues/3452652>
- ☒ ~~Market Research for CRM integrations — research the most used modules and the services they support~~
 - ☒ ~~Done. Decided on trying to get both SimpleNews and MailChimp added as options~~

Proposed Approach

Leveraging WebForm contrib, recipe will:

- Install Webform and dependencies

- Create a “Basic” contact form, consisting of:
 - Name* (single field)
 - Email*
 - Message*
 - Submit action
 - Sends message to the admin email on file
 - Stores the contact in DB with relevant info (date/time, form name)
 - * “required” is assumed for these minimum fields
- With optional fields, configured on Recipe initialization via a checkbox, for:
 - Business name
 - Phone
 - Zip code?
 - Others TBD, but to be kept very simple (no conditional logic, no external subscription service like MailChimp)
- Create a “Contact” page with the Webform block (?) added
- Creates a Menu item for the Contact page, if a Menu exists

First Phase

First phase includes the above actions. There is no additional UI needed for editing the contact form. It is configured and created during onboarding the Recipe. To edit the form, an author will use the existing Webform admin UI. At best, we give them a quick “Configure” action from the front-end display that quickly gets to them to the right place to conduct the edit.

Second Phase

Once Experience Builder shakes out more, we leverage the React-driven admin UI to make edits to existing Contact Forms. The experience should be drag and drop, inline editing of Labels and Placeholder text, simple toggle for required or optional.

- Add Inline Tour walkthroughs
- Investigate the most-commonly installed modules for CRMs like Constant Contact, Mailchimp, etc.

- Investigate how we can make editing the form in the Admin simple and easy (Experience Builder?)
- Integrate with AI Agent — is there anything special we need to do?

Module/Service	# of Installs	Compatible versions	Active?
Simple News	35,004	Works with ^9.3 / ^10	Yes
MailChimp *	26,696	Works with ^8.7.7 / ^9 / ^10	Yes
Mass Contact	1706	Works with ^9 / ^10	Maybe
Campaign Monitor	767	Works with ^9.4 / ^10	Yes
Constant Contact	559	Works with 7.x	No
Marketo MA	221	Works with >=9.2	Maintenance
Mail Up (Commerce Guys)	46	Works with 7.x	No
Email Newsletters			No
Newsletter			No
MimeMail (not a newsletter, but an add on for Drupal to send HTML formatted email)	66,383	Works with ^9.3 / ^10	Yes

Related: [Mail System](#) module

* One nice thing about having a third-party service, like MailChimp, handle your actual mailing, is that they will deal with the hassle of your site getting black-listed as a possible spam-source, if ever that happens. If Google, Yahoo, or any other major email service ever suspects your site as being a source of spam and decides to blacklist you (meaning that anyone with an @gmail.com or @yahoo.com email address will suddenly and silently stop receiving your mailings), getting your server unblacklisted is a *giant* pain, and a bit of a black art. But with a third-party service, they have experts on staff who know how to deal with this sort of thing and get it cleared up if/when it happens.

Ongoing Notes

It is my belief that we need a new way to edit the form visually. The edit screens for WebForm are too complex. A middle-layer UI should be developed to edit form fields in a more Layout Builder friendly way, while keeping the option to do advanced config through the existing Admin Edit UI.

Phil's thinking:

- Seeing the experience builder demos, I wonder if we couldn't build a react app for Webform?
- It looks like they have a lot of the form components built, which I'm sure we could reuse
https://git.drupalcode.org/project/experience_builder/-/tree/0.x/ui/src/components/form?ref_type=heads
- We'd need to put an API in front of Webform to save things, which we could borrow heavily from the XB work already.
- There are SDC in core, I wonder how useful a single directory form component would be? Maybe those could interface between Webform and React? Seeing the XB container code makes me think something like that could be accomplished?
https://git.drupalcode.org/project/experience_builder/-/blob/0.x/components/containers/one_column/one_column.component.yml?ref_type=heads

Some thinking from Pamela to pass along to Phil and Jordan:

- by the way, when we talked last i was saying that we can't delete stuff with recipes, which is true, but we can specify what to import. You can use a wildcard to import all of a module's install config, but if we didn't want to use the contact form provided by webform, we could just specify which files to import and leave that one out. and we can also override any of the specific config. so we are not "stuck" with anything that the module ships with.

Check in Meeting 09/17

- Webform has been recommended because it gives people room to grow and expand their Forms, whereas with core Contact it will not grow (this is similar to conversations that are happening around Search and Search Core vs. Search API)
- We don't want custom code, the only custom code so far is the Installer and that goes away. "Middleware" UI is not desirable. How do we hook into existing UI paradigms or create a custom contrib module to be the UI.
- Experience Builder is going to take over more of the admin UI in the long term. Views might have similar ideas that it needs to tackle in the admin.
- Newsletter integration might be something to explore soon , maybe in Phase 1
 - Which brands/services?
 - Do we create a simple form for this, ala WordPress plugins?
- Simple email is being solved and we might contribute to the ideas there.
- There are other tracks adding content to the default config
 - SEO Recipe Track is adding menu items, so we can look at how they do that
 - Main Menu? Footer menu? Which one, or both?
 - A Homepage is being created, Privacy Policy page, etc.
- Start a repo here: https://git.drupalcode.org/project/drupal_cms

Check in message 10/10

Yes, the recipe so far seems close. Here are some recent happenings:

- Phil set it up so that we ignore the Contact Form that Webform creates in favor of our own. This leaves two Contact Forms in the list, one as inactive and one as active. Both do similar things. We think this is confusing and the wrong approach. In the second iteration of the recipe, we will leverage the default Webform Contact form to be the one we use, and make modifications to it instead of removing it
- The recipe so far places the new Contact Form as a node into the Menu. This does not allow other content to live alongside the contact form, which I think is a mistake. With the market research we have done, almost every other sample Contact page has a place for general contact info — a message, business

location, general email or phone number, possibly hours of operation. We are going to change this behavior to a block placed on a page node which will give the author the option of providing additional content, probably with some default "Contact" content the author can swap for their own.

- We did a quick survey of the popular Email Newsletter modules and there are not many. Simple News is the most popular with 35,000 installs, and it is actively maintained. MailChimp is the next most popular, with 26,000 installs. Ideally our path forward would be to give someone an option for either one. Simple News is free and all within Drupal. MailChimp is not the most popular now but that could change once more marketers use the site. That said, I don't love having the only option we present to be an external paid service. So that is the direction we are heading there.

For additional future phase work, we have the following in mind:

- Add Inline Tour walkthrough content (need to investigate how that is done)
- Integrate with AI Agent — is there anything special we need to do?
- Investigate how we can make editing the form in the Admin simple and easy (Experience Builder?)

That is the status report. I think the first three bullets here can be completed for the Nov beta. We will work towards that goal.