Create a web form s

1. Click and drag a web form goal onto the campaign canvas.

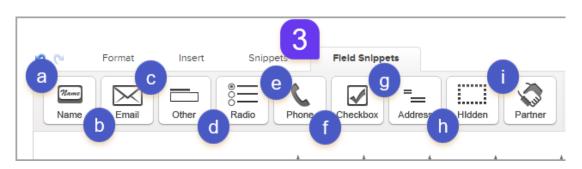


2. Type the Goal Name where the text is highlighted. Now, double-click the goal to configure the web form.



- 3. To access all of the available fields for a form, click the **Field Snippets** tab. Field Snippets contain:
 - a. Name: Captures the Contact Name field
 - b. Email: Captures either Email, Email 2, Email 3, or Create a Custom Field
 - c. **Other**: Captures all other fields including Custom Fields or you can create a Custom Field
 - d. **Radio**: Create a list of options that will be stored in the contact record under "**Forms**" **Note**: This is not captured in a field.
 - e. Phone: Capture phone number in Phone Type 1-5 & Fax 1-2
 - f. **Checkbox**: Create a single selection box to a multiple choice and captures in the contact record under "**Forms**" **Note**: This is not captured in a field.
 - g. Address Capture Shipping, Billing Address, or Optional

- h. **Hidden** Add fields that will not display on the Web Form but will capture information based on setup
- i. Partner Capture information to create a Referral Partner Record



j. To delete hover of Field Snippet and click the trash can

× =	
First Name *	First Name *
First Name *	First Name *
Last Name *	Last Name *
Email *	Email *
Submit	
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4. The "Snippets" tab is where you can drag and drop elements, such as:

Design	Thank-you Page	Settings Code	
Paragraph	Format Insert	Snlppets 4 Image YouTube	Field Snippets
			2

- a. Paragraph Text box
- b. Title Text box with large font and bold
- c. **Spotlight** Image aligned left with Text box on the right
- d. Image Place image before or after other snippets and then select or upload

an image

- e. YouTube Link to a YouTube video
- f. Social Add Social Media Links
- g. Spacer Add space between other snippets
- h. Divider Adds bar between other snippets
- i. HTML Add custom coding
- j. Logo Automatically adds your logo that is saved under Admin > Branding Center > Logo
- k. Configure your field snippet and click Save.
- I. To delete either type of snippets, hover over the item and click the trash can.

First Name *	First Name *
Last Name *	Last Name *
Submit	

- 5. The Format tab to access all of the text formatting tools
 - a. Fonts Format, Family, Font size, etc
 - b. Unordered and Numbered Lists
 - c. Alignment
 - d. Quote
 - e. Remove formatting
 - f. Table
 - g. Link
 - h. Paste text
 - i. Find & Find/Replace
 - j. Layout & Style

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- k. **Insert** tab allows you to insert the following elements into either the Paragraph or Title Snippets
 - a. Image
 - b. Table
 - c. Divider
 - d. Merge Fields A placeholder used to insert personalized content For example, ~Contact.FirstName~ is a merge field that inserts the value stored in the First Name field of the contact record.

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e. Special Characters

Insert Snippets Field Snippets Image Image Divider Ω	Design	Thank-you Page	Settings	Code	
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	Image		Ω Speci		-

I. Click on the Layout & Style button to configure the look of your web form.

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		Layout & Styl	Header	+ > Off	
			Footer	++ Off	
			Label Position	Above •	
			Label Alignment	Left •	

6. When you are finished designing your web form, click the **Thank-You page** tab and configure your Thank-You page.

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Thank-yo	ou page	•			
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90	Format	Insert	Snipper	ts	

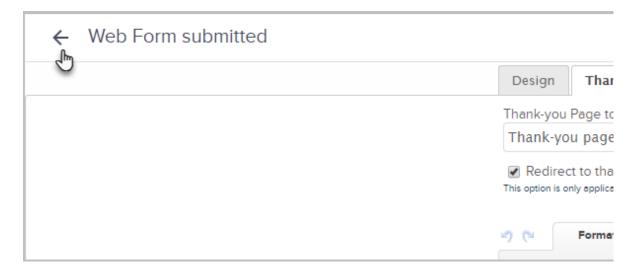
7. To test your form, just click the **Test** button and select a person.

Sav	ed at 01:44 PM	Actions ~	Ready 🛑
	Martin Cash		
	Martin Cash		

8. Once you've tested your form and are happy with it, change it from **Draft** to **Ready**.

Saved at 01:44 PM	Test 🗸	Actions ~	Ready

9. Click to go back to the campaign and Publish your changes.



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10. To grab the URL of the web form, or grab the code to place on your site, go back into the web form goal and click on the **Code** tab.

Important! Every time a web form is changed, the *javascript* and *hosted* version will automatically update. If the *HTML* or *HTML unstyled* code is used, then the web form code must be manually updated on your website in order for the changes to take effect.

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