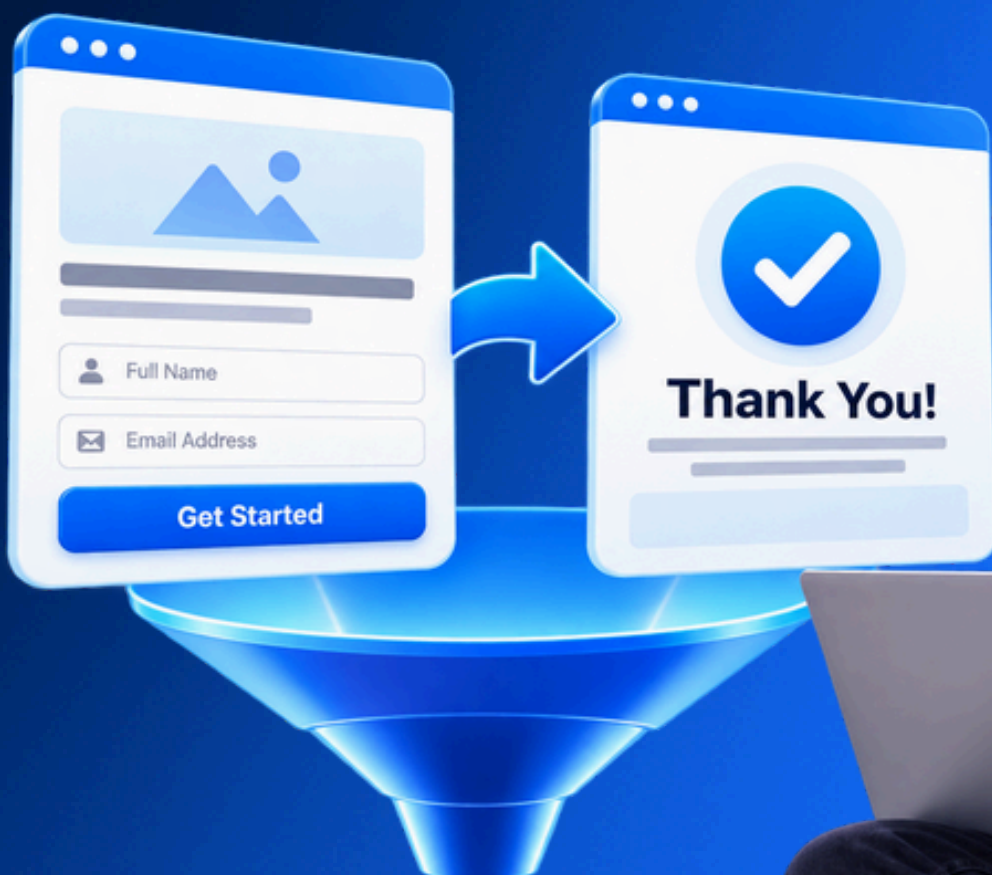


Funnels

Building an Opt-In Step with a Form

Add a form to your opt-in step, send visitors to the thank-you step, then save, preview, and publish.



Building an Opt-In Step with a Form

What You'll Learn

- How to open your opt-in step in the builder
- How to edit fields and save the form
- Where to find the Form element
- How to send visitors to the Next Step
- How to pick an existing form
- What Save, Preview, and Publish each do
- How to build a new form in the builder
- How to test with your own email

LEARNING OBJECTIVE

By the end of this lesson, you will be able to add a working form to an opt-in step that sends visitors to your thank-you step.

Key Definitions

Form element

The builder item you drag onto a page so visitors can type their details.

Form picker

The dropdown where you choose an existing form or create a new one.

Next Step

A submit choice that sends visitors to the following step in the funnel.

Publish

The button that makes your saved version live for visitors.

A form with no next step is a dead end. Send them somewhere, then test it yourself.

Plan the form

1. Choose my form fields

ACT AS A FORM DESIGN HELPER

I am building an opt-in for [my offer] and want the shortest useful form.

Write:

- The fields I truly need
- Fields I should leave off
- A button label that fits my offer

2. Write my form button text

ACT AS A CLEAR COPYWRITER

My form button just says Submit and I want wording that fits [my offer].

Write:

- Five button label ideas
- Which one is clearest
- A short line to place under it

3. Name my form clearly

ACT AS A ORGANIZED RECORD KEEPER

I will have several forms across [number] funnels and need names I can find.

Write:

- A simple form naming pattern
- Five example names
- When to reuse a form versus build new

4. Plan my opt-in headline area

ACT AS A PAGE LAYOUT ADVISOR

I need a clear spot above my form on my [type of] opt-in page.

Write:

- Where the form should sit on the page
- What short text goes above it
- What to keep off the page

5. Draft my thank-you message

ACT AS A FRIENDLY MESSAGE WRITER

After visitors submit my form for [my offer], they land on a thank-you step.

Write:

- A short headline for the thank-you step
- What happens next, in two lines
- A line that says to check their inbox

Test and improve it

6. Write my test script

ACT AS A CAREFUL QUALITY CHECKER

I want to test my form with my own email before I publish.

Write:

- A step-by-step test from open to thank-you
- What to check on each page
- Where to look for my test entry

7. Check my steps are in order

ACT AS A FUNNEL ORDER REVIEWER

My funnel has [list of steps] and I want to confirm the order makes sense.

Write:

- The right order for those steps
- Which step should hold the form
- A fix if thank-you is above opt-in

8. Review my form like a visitor

ACT AS A FIRST-TIME VISITOR REVIEWER

My form page is saved and I want a stranger's view before I publish.

Write:

- Three things that might confuse someone
- A rewrite of anything unclear
- A short list to recheck after changes

9. Document my form settings

ACT AS A SETUP DOCUMENTATION WRITER

I want a record of how I set up the form for [my funnel].

Write:

- A one-page setup summary
- Each field and the submit setting I chose
- A line for what to review later

10. Plan my publish checklist

ACT AS A LAUNCH PREPARATION COACH

I am about to publish my opt-in step for [my audience].

Write:

- Checks to finish before I publish
- What to do if no domain is attached
- What to check right after going live

Bonus Tips & Your Rollout Checklist

Fewer fields

Ask only for what you need. Fewer fields mean more sign-ups.

Reuse a form

Pick an existing form from the dropdown when its fields already fit.

Always set submit

Send visitors to the Next Step so they see it worked.

Save is a draft

Save keeps your work but does not change what visitors see.

Test with your email

Fill out the form in Preview before you publish.

Check Submissions

Search for Forms, open Submissions, and find your test entry.

Your Rollout Checklist

- 1 Click Edit on your opt-in step to open the page builder
- 2 Add the Form element from the Elements section
- 3 Pick an existing form or create a new one
- 4 Set the form to send visitors to the Next Step
- 5 Save, preview with your own email, then publish