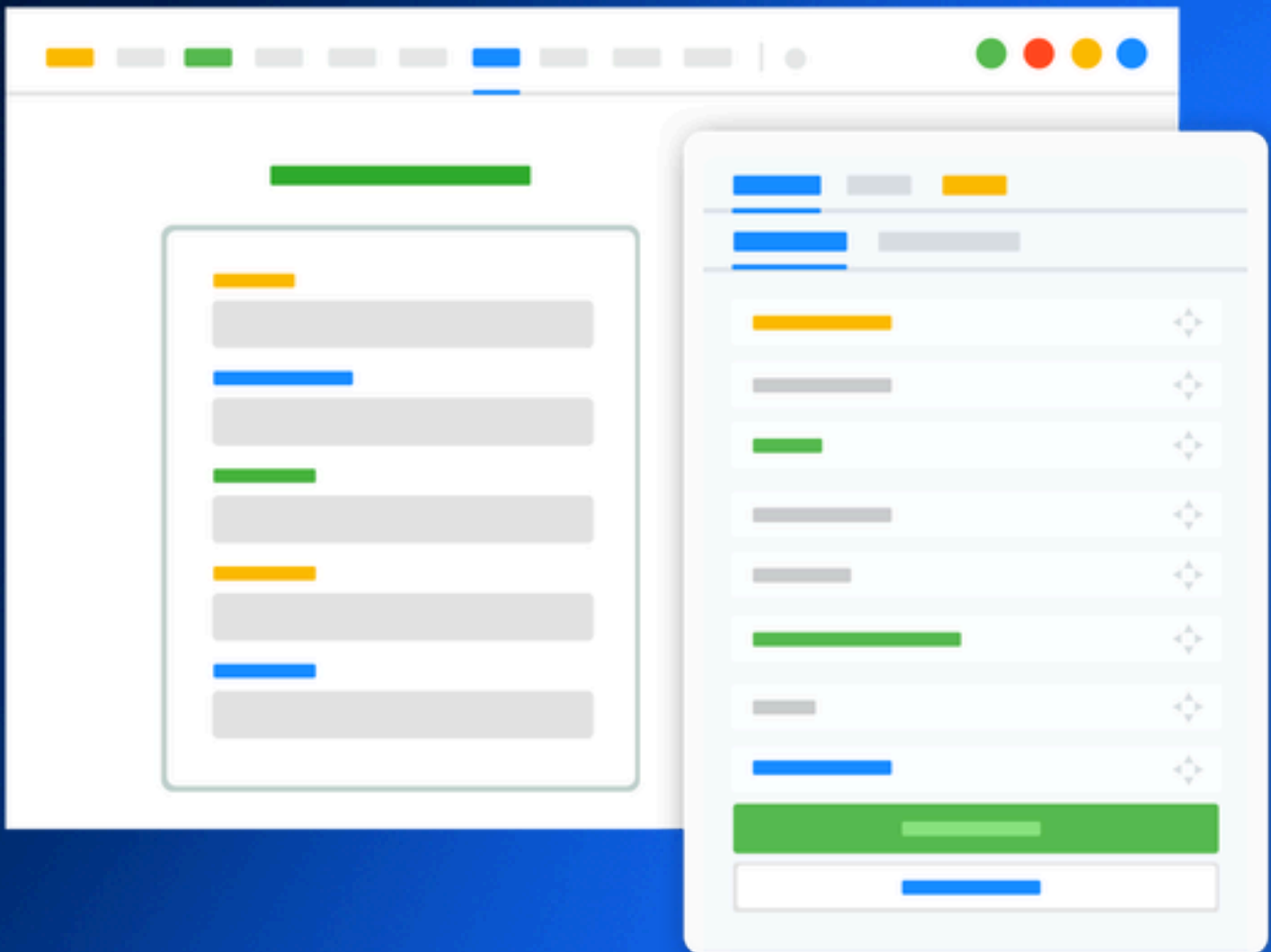


REFERENCE GUIDE

Forms & Surveys

Build forms and surveys that work



Forms, Surveys and the Builder

What It Is

A form is a one-page set of boxes that sends each entry to your CRM. A survey uses the same builder but asks questions across slides. Search for Forms or Surveys to find them.

How It Works For Your Business

- Search for Forms or Surveys. Both screens share the same layout.
- Forms has four tabs: All forms (your list), Analytics (views and finishes), Submissions (answers), and Settings.
- Click Create form to start blank or from a template.
- Inside the builder, the fields panel is on the left, the canvas is in the middle, and the sidebar is on the right.
- The top bar holds Conditional Logic, a bell icon for notifications, Integrate for sharing, and Save.

Forms, Surveys and the Builder – Tips & Guidelines

Tips

- Use a form for quick info and a survey for a series of questions.
- The All forms tab is your home base for every form you make.
- Learn one builder and you know both, since they match.
- Save often while you build.

DO

- Start with a form for simple needs
- Learn the four builder zones
- Check Submissions after tests
- Save as you go

DON'T

- Use a survey for a quick contact box
- Skip the All forms tab
- Guess what the bell does
- Build without saving

Fields and Required Settings

What It Is

Fields are the boxes on your form. You drag them from the fields panel onto the canvas, then click each one to set its label, placeholder, required status, and short label.

How It Works For Your Business

- Click Create form, choose blank or a template, and give it a clear name.
- Drag Name, Email, Phone, and Message from the fields panel onto the canvas, and reorder them by dragging.
- Click a field and open General Settings to change the label, placeholder, and Required setting.
- The short label is a shorter field name that shows in your Submissions table.
- Click Save, then Preview, submit a test, and check the Submissions tab.

Fields and Required Settings – Tips & Guidelines

Tips

- Put the easiest question first so more people finish.
- Make email required so you can follow up.
- Ask only for what you need, because every extra box costs you people.
- Test with your own email address.

DO

- Name forms clearly
- Mark key fields required
- Fill in short labels
- Preview before you share

DON'T

- Make every field required
- Ask for things you will not use
- Skip the test entry
- Leave the name as Untitled

Custom Fields and Special Elements

What It Is

Custom fields let you ask questions that do not exist yet and save answers on the contact record. Special elements like dropdowns, ratings, and file uploads make forms richer.

How It Works For Your Business

- Look for the Add Object Fields list, tick the fields you want, and add them to the canvas all at once.
- Create a custom field with a field name and a unique key. Look for the create option in the fields area.
- Names and keys may lock after you save, so choose carefully. Search for Custom Fields to edit later.
- Use dropdown for long lists, radio for pick one, and checkbox for pick many. Look for an Other option.
- Add a Rating (stars, hearts, and more, up to ten) and a File Upload from the add elements menu.

Custom Fields and Special Elements – Tips & Guidelines

Tips

- Name a custom field the way you would say it out loud.
- Removing a field from a form does not delete it from your account.
- Deleting a custom field in Custom Fields is permanent across your account.
- Preview choice lists and trim long ones.

DO

- Pick clear names like Budget Range
- Choose radio when only one answer fits
- Add a rating after a service
- Use file upload for photos or documents

DON'T

- Name fields with codes like Q4
- Delete a custom field without checking
- Use a huge dropdown list
- Add every special element

Styles, Themes and Layouts

What It Is

The right sidebar controls how your form looks. Styles sets layout and colors, Themes gives one-click looks, and Advanced gives fine control over borders, inputs, labels, and placeholders.

How It Works For Your Business

- In Styles, choose Single Column, Two Column, or Single Line, and set field width as a percentage.
- In Colors and Background, change the font, background color, or background image.
- Set a Primary Color with the color box or a hex code. Look for a toggle that links it to your button.
- Themes apply a ready-made look. Applying one can replace your current styles, so pick it first.
- In Advanced, style the form border, corners, shadow, input fields, labels, and placeholders. Custom CSS is optional.

Styles, Themes and Layouts – Tips & Guidelines

Tips

- Single column almost always wins on phones.
- Pick a theme, then primary color, then check layout.
- One brand color is enough.
- Change two or three Advanced settings, not all of them.

DO

- Choose a theme first
- Match your brand color
- Preview on a phone view
- Keep the design simple

DON'T

- Apply a theme last
- Use many colors
- Change every setting
- Lose contrast between text and background

After Submit: Messages and Emails

What It Is

What happens after someone submits matters. You choose a thank-you message or a redirect, and you can send an email alert to your team and an automatic reply to the person.

How It Works For Your Business

- In the builder, open Settings, then On Submit, and choose Message or Redirect.
- A Message shows a thank-you on the form. Edit the headline and subtext, add custom values, and style the box.
- Check Desktop and Mobile views of your message before saving.
- A Redirect sends people to another page. Paste the full address, starting with https.
- Click the bell icon to set the team email notification and the Auto Responder with Subject, Reply to, and Sender name. Save in the panel, then save the form.

After Submit: Messages and Emails – Tips & Guidelines

Tips

- One headline and one sentence is plenty.
- Use a custom value like first name to make it personal.
- Test by submitting with your own email.
- Check your spam folder when testing auto replies.

DO

- Start with a message
- Check the mobile view
- Turn on the auto responder
- Preview and submit a test

DON'T

- Leave people with a blank screen
- Paste a link without https
- Forget the second Save
- Skip the inbox check

Multi-Slide Surveys

What It Is

A survey spreads questions across slides. You can add slides, move and clone questions, and show one question at a time with a progress bar and footer buttons.

How It Works For Your Business

- Search for Surveys and create a new survey.
- Add slides and move questions between them.
- Clone a slide or an element to save time on repeats.
- In Styles and Options, look for Survey Type and the One Question at a Time choice.
- Adjust the survey footer, including the progress bar and buttons, then Save and Preview, and check how the progress bar looks on mobile.

Multi-Slide Surveys – Tips & Guidelines

Tips

- Group related questions on the same slide.
- Cloning saves you from rebuilding similar questions.
- Preview on mobile, since many people answer on phones.
- Keep each slide short.

DO

- Clone repeated elements
- Keep one idea per slide
- Show a progress bar
- Preview every slide

DON'T

- Cram many questions on one slide
- Rebuild items you can clone
- Skip the mobile check
- Add slides you do not need

Conditional Logic and Jumps

What It Is

Conditional logic shows or hides things based on answers. In surveys, Jump To sends people to a chosen slide. Rules help each person see only what applies to them.

How It Works For Your Business

- Open Conditional Logic in the top bar and click Add New Condition.
- Choose a field, a field state (the operator), and a value. Combine rules with AND or OR.
- Actions include Show or Hide Fields, Display Custom Message, Redirect to URL, and Disqualify Lead.
- In surveys only, Jump To sends people between slides.
- Rules run from the top down, so order matters. Test every path.

Conditional Logic and Jumps – Tips & Guidelines

Tips

- Start with one simple rule and test it.
- Use AND when all must be true and OR when any can be true.
- Keep rule order in mind, since it runs top down.
- Test a path for each possible answer.

DO

- Test every answer path
- Name your fields clearly
- Order rules on purpose
- Keep rules simple

DON'T

- Stack many rules at once
- Mix up AND and OR
- Forget Jump To is surveys only
- Ship without testing

Sharing, Embedding and Submissions

What It Is

Integrate gives you a form link and embed code. Layout and trigger options control how a form appears on a page. The Submissions tab is where you review, filter, and export answers.

How It Works For Your Business

- Click Integrate to copy the form link or the embed code.
- Embed layouts include Inline, Popup, Sticky Sidebar, and Polite Slide-In, with triggers like scroll percentage, delay, or always show.
- Drop a Form element on a funnel or website page, or embed the code on an outside website.
- In Submissions, use date filters and search, and use the expand icon to view one entry or download a PDF.
- Use Manage Columns, checkbox bulk actions (CSV or delete), and Export. Jump from a submission to the contact record.

Sharing, Embedding and Submissions – Tips & Guidelines

Tips

- Use the link for quick sharing and embed to keep people on your page.
- Pick a popup trigger that does not annoy visitors.
- Manage Columns keeps the table easy to read.
- Test the live page after embedding.

DO

- Preview embeds on a real page
- Use search for one person
- Set columns you use
- Export when you need a copy

DON'T

- Pop up instantly on every page
- Delete entries in bulk by mistake
- Forget to test the embed
- Leave the table cluttered

Payments, Workflows and Analytics

What It Is

Forms can collect payments and start automations. Analytics show views, responses, and completion. Protection settings help block spam and check emails and phone numbers.

How It Works For Your Business

- Add a Payment element from Add Element, then Integrations. Set products, suggested amounts, Other Amount, currency, and a Recurring Payment toggle.
- Look for order bump and upsell options, and the option to skip card collection for zero-dollar orders.
- In Workflows, add a Form Submitted trigger, filter by form name, and add actions like Send Email, Add Tag, or Create Opportunity. Save and Publish.
- Open the Analytics tab in Forms or Surveys to view Total Views, Responses, Average Time, and Completion Rate, plus survey slide drop-off.
- Look for spam protection, Email Validation, SMS Verification, Save Progress, and scheduled open and expiry settings.

Payments, Workflows and Analytics – Tips & Guidelines

Tips

- Run a test payment submission, then search for Transactions.
- Filter your workflow trigger to the exact form.
- A low completion rate may mean the form is too long.
- Turn on spam protection before you share widely.

DO

- Test payments with a sample order
- Filter triggers by form name
- Check drop-off by slide
- Turn on spam protection

DON'T

- Publish a workflow untested
- Skip the Transactions check
- Ignore a low completion rate
- Share without spam protection

Key Terms Glossary

Form

One-page set of boxes that sends entries to your CRM.

Survey

Questions spread across slides, like a short conversation.

Canvas

The middle of the builder, showing your form as visitors see it.

Fields panel

The left-side menu of items to add to your form.

Placeholder

Gray hint text inside a box.

Short label

Short field name shown in your Submissions table.

Custom field

A question you create that saves on the contact record.

Unique key

A behind-the-scenes ID for a custom field.

Theme

A ready-made look that changes your whole form.

Redirect

Sends people to another web page after they submit.

Auto responder

Automatic email sent to the person who submitted.

Conditional logic

Rules that show or hide things based on answers.

Getting Help

Your software changes over time, so a button, tab, or menu may look a little different from what you see here. If something does not match, check the in-app help for Forms and Surveys or look for the option with the closest name.