

User Guide: Create and Use Forms

Updated: October 2012

In Act-On, the forms you create are the trusty workhorses of your system. It's easy to create forms for registrations, surveys, and more. Put links in online ads to capture new leads. Put links in emails for webinar registration or surveys. Post forms on your website that trigger document downloads, automatic response emails, and alerts to salespeople. You can link form fields to lead scoring, so that important data is included in lead profiles and in CRM contacts. You can link to ecommerce with a single click.

There's a lot to know about forms. This guide explains the basics about how to generate, use, and track a form using Act-On. Download a [forms checklist](#) for a check-off before you deploy a form, and be sure to visit the [Knowledge Base](#) for more information when you're ready to learn more about forms.

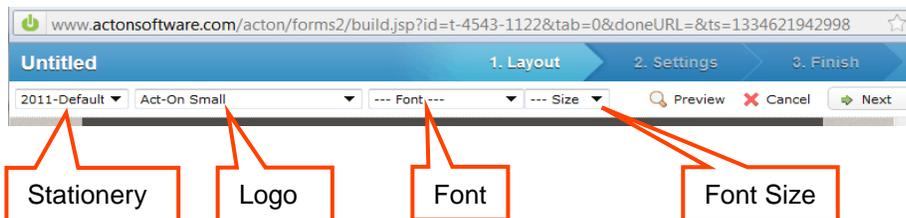
GENERATE A NEW FORM

Act-On gives you multiple ways to create a new form.

- Go to the Home page, and choose Web Forms from the Quick Start menu, or go to Library > Forms. A page will open that displays all your existing forms, sorted in folders if you've created folders.
- To create a new form from an existing one, hover over the form and select *Copy*.
- You can try the *Import* function to see if your website form can be pulled into our system.
- Create a completely new form. Click **New** and follow these three steps:

STEP 1 – LAYOUT

1. Layout lets you set your form up, including the fields. At the top of the page, you'll see four drop-down menus.



If you established a default **Stationery** and **Logo** in your Account Branding area, these defaults will automatically be applied to your form. If you'd like to make a change to either one, you can simply choose another stationery or logo via the drop-down menus. With the **Font** and **Size** drop-down menus, you can apply a font and font size to apply across your form.

2. All new blank forms contain two Smart Content blocks:

Document shortcuts

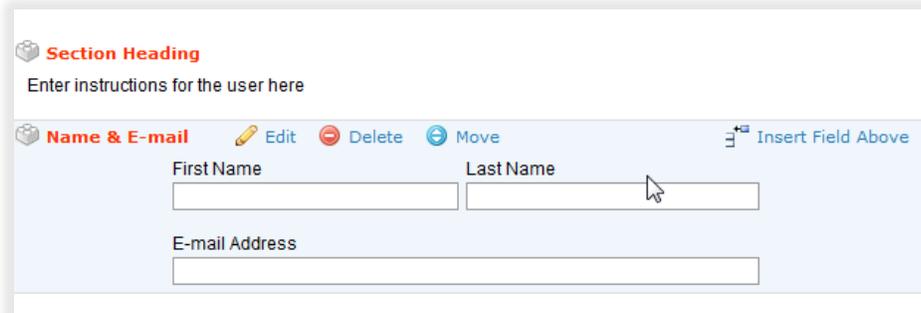
- [Generate a New Form](#)
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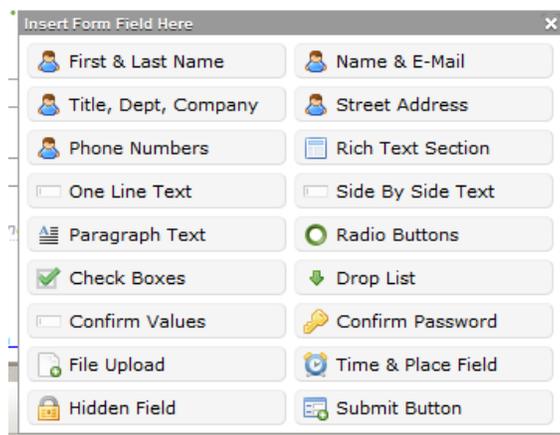
- a. **Section Heading**, which is a Rich Text block. This generally contains instructions.
- b. The **Name & E-mail** block.

Hover over any of these Smart Content blocks to see four options: Edit, Delete, Move, and Insert Field Above.



Watch a 25-minute Act-On video about [creating forms](#).

- Click **Edit** to modify the labels, specify restrictions and requirements, and determine the column names.
- Click **Delete** to delete the Smart Content block and all the fields it contains.
- Use the **Move** option to move a block; simply click and hold on **Move** and drag the block to the desired area.
- Click **Insert Field Above** to insert any one of 18 Smart Content block options.



Smart Content Block options

Smart Content Blocks save time while offering maximum flexibility.

After choosing and inserting a Smart Content block, select **Edit** to customize the block's content. Most Smart Content Block have three areas:

- The **Display Settings** area contains fields that hold data your end users see, or that modify that data's display characteristics.
- **Input Validation** lets you add validation options to your text input fields,

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such as applying content restrictions (e.g., "cannot be blank") and making the fields required or not.

- **Data Field Names.** When people fill out your form, they provide data that goes into a list. A new list is automatically created if you don't associate your new form with an existing list. The Data Field Names you create here will name columns in the database list, but will not be exposed to end users. In many cases the label that users see and the data field name will be the same, but they don't have to be. For example, the label of a form field may ask readers, "What is your favorite color?" The corresponding field in the database list may be named just "Color" for size or simplicity.

If you've already defined your Standard Field names, select the database icon and simply choose the column name you have already specified. You can also choose to type the Column name directly into the open field.

At the top, there are five pre-configured blocks (**First & Last Name; Title, Dept, Company; Phone Number; Name & Email; Street Address**). These have a blue torso icon, because they are associated with a person's information. These are frequently used data fields, so Act-On created them as pre-made blocks to save you time. The rest of them are:

- The **Rich Text** block is the most versatile block; you can input text, insert images, link to documents, forms, and websites, create tables, and much more. Click **Edit** to access the rich text editor inside the text block. Three rows of standard text editing icons help you customize your text. Six additional Act-On specific icons assist you to access links to Act-On materials, insert personalization fields, and create layout structures for complex content. See the [Rich Text Block Advanced User Guide](#) for more information.
- The **One Line Text** and **Side by Side Text** blocks are essentially the same, except the first is a single-column format and the second is a two-column format. Use these when you need to gather only one or two pieces of information. With either option, you can choose multiple validation rules such as:
 1. Cannot be blank
 2. Should be a number
 3. Should be an e-mail address
 4. Should be an e-mail address, not Hotmail, Gmail, Aol, or Yahoo
 5. Should be an e-mail address, not role-based
 6. Should be a US phone number

Additionally, with the Side by Side Text block, you can make one side required and the other side not required.

- Use the **Date Field** to capture date entries. A variety of date formats are available for your data collection.

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- Use the **Paragraph Text** block when you want to ask a question and give people the ability to respond in paragraph format.
 1. Enter the label and select what size the input field will be: small, medium, or large. Make sure to indicate whether this is required or not.
 2. Provide a Field Name by either typing out the name or making the selection after clicking on the database icon.
- **The Radio Buttons** and **Check Boxes** blocks operate similarly. The only difference is that Radio Buttons allows only a single selection whereas Check Boxes allow for multiple selections to be made.
 1. For either, first enter a label and choose a layout of either horizontal or vertical ranging from one column up to four columns.
 2. The wording in the Labels field will appear on the form. The wording in the Corresponding Values field is the data we push into the signup list. Again, indicate whether or not it's required and provide or select the Column Name.
- The **Drop-Down List** allows users to make a single selection. If you will use these selections again in another drop-down list question, select the *Save Template* option so you can reuse it. The next time you insert a drop-down list option, just select *Load Template*, select the template to upload, and your drop-down list, with its choices and corresponding values, will automatically populate.
- **Confirm Values** and **Confirm Password** blocks mask data entries, letting you ensure that important information is properly validated. Users are prompted to input a value twice; the system will confirm whether both entries have the same value. One common use of this is "Please enter your email" / "Please confirm your email."

Our system will display a green checkmark if the two values match and a red one if they don't. With the **Confirm Password** block, Act-On will mask the characters in both the input value and confirm value fields.
- The **File Upload** field allows individuals to attach a file to their form submission.
- Use the **Time and Place** block to allow people to download meeting or event details onto their calendar. You can insert a description of the meeting, time, date and duration, meeting location with a map and any conference details you want to provide. All of this will then be saved to their calendar.
- **Hidden Fields** can be used to pass data in the background of the form. As an example, perhaps the field name will be *Lead Source*, and the field value will be "website." This is useful information in your CRM. When linking the form to an email campaign, make sure the Hidden Field has the exact same column name as your mailing list. If you select pre-fill then the system will auto-populate data from your marketing list into your sign-up list.

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- Use the **Captcha Field** to help catch spam bot submissions.
- The **Submit Button** field allows you to choose a custom button the user will click to submit a form, align the button to the left, right, or center-aligned, and move the button between Smart Content Blocks to position it in the location you choose.

Make sure to click **Submit** in each Smart Content Block to ensure your changes are saved.

STEP 2 - SETTINGS

After inserting and editing your form fields, click **Next** or **2. Settings** in the right-hand corner of the color bar at the top. This step allows you to specify what happens after the form submission.

1. Under **General**, give your form a title and description. Use terms that will help you easily identify the form and its purpose. This will be useful as you build a library of forms that you reuse.
2. The **Response Page** allows you to define what the user experiences after they submit the form. There are four options:
 - a. **Show This Message.** You can craft a message directly in the editor. This message will display with the same stationery and logo which you defined for your form. One common example: "Thank you for taking the time to register for this event. You will receive a confirmation email shortly".
 - b. **Redirect to URL.** You can insert the URL of any webpage and your users will be directed to it once they submit the form. For instance, you can put in your company's homepage if you would like to redirect people there.
 - c. **Show this Landing Page.** You can direct users to an Act-On landing page you have created. For instance, if they are registering for an upcoming event, the Landing Page can provide them with more event details.
 - d. **Show Another Form.** You can direct users to another Act-On form you have created. This would be ideal for creating a multi-page questionnaire or survey.
3. Customize the appearance of your Response Page by specifying how the **Response Display** will appear. There are four options:
 - a. Same browser window
 - b. New browser window
 - c. The whole browser window
 - d. The parent browser window
4. You can also have a **Confirmation Email** sent to the user after they submit the form. One example of use would be providing additional information to someone who registered for an event.

Another common use is providing a document download to fulfill the offer

2. Settings

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the form made for submission.

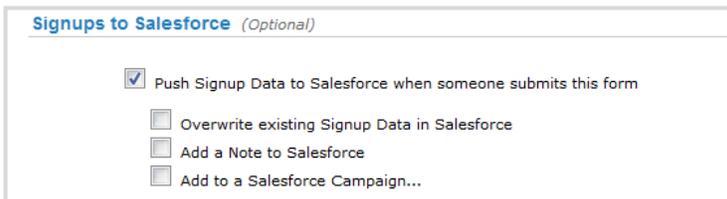
5. The **Signups to (name of CRM here) option** lets you set the system to automatically push submission data into your CRM (including Salesforce, Microsoft Dynamics, SugarCRM or SalesLogix). Note that it's **very important** that your form fields map to your CRM fields; the label must be the same, including spelling and punctuation (watch out for variations such as "e-mail" and "email").

If (based on the email address) the submitted person does not already exist as an entry in your CRM database, Act-On will create the person's data as a lead.

When selecting the checkbox to “Push Signup Data to (name of CRM here) when someone submits this form”, additional options will appear. **The options you see depend on which CRM your Act-On platform is integrated with.**

- a. **Overwrite existing Signup Data...** Selecting this option directs Act-On to find the existing record in your CRM database and overwrite the record's data with the form submission data. If you don't want all fields to be updated, you can specify only certain fields to be overwritten by selecting *Use signup list's Push settings to select fields*.
- b. **Add a Note to...** Select this to have Act-On automatically document the user's Activity History to note that this specific form was submitted.
- c. **Add to a Salesforce Campaign.** Select this option to group the individuals who submitted this form into a Salesforce campaign. Act-On will display all of your existing CRM campaigns alphabetically or you can choose to create a new Salesforce campaign right within the Act-On platform. Once you select the campaign, you can then specify what member status should be reflected on the record. You can also dynamically assign form submissions to Salesforce campaigns using a hidden field or appending a tag to the end of the form url.

Those integrated with Salesforce see this screen:



Signups to Salesforce (Optional)

Push Signup Data to Salesforce when someone submits this form

Overwrite existing Signup Data in Salesforce

Add a Note to Salesforce

Add to a Salesforce Campaign...

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Those integrated with SugarCRM see this screen:

Signups to SugarCRM *(Optional)*

Push Signup Data to SugarCRM when someone submits this form

Overwrite existing Signup Data in SugarCRM Use signup list's Push settings to select fields

Add a Note to SugarCRM

Those integrated with Microsoft Dynamics see this screen:

Signups to MS-Dynamics *(Optional)*

Push Signup Data to MS-Dynamics when someone submits this form

Overwrite existing Signup Data in MS-Dynamics

Add a Note to MS-Dynamics

Those integrated with SalesLogix see this screen:

Signups to SalesLogix *(Optional)*

Push Signup Data to SalesLogix when someone submits this form

Overwrite existing Signup Data in SalesLogix

Add a Note to SalesLogix

6. **Capped Signups.** Select this option when you need to place a limit on the number of people that can submit your form, such as registration for an event. Once the limit has been reached, you can redirect users to any URL you define here in replacement of your form.
7. **Expiration.** If this is left blank, the form will not expire. You can fill in an expiration date, and a URL redirect page that will be served instead of the form after expiry.
8. **Alerts.** Fill in email addresses for those you want to be notified when a form is submitted. The email alert Act-On sends will contain all the form submission data for reference.
 - a. **Form submission alert filters for sales users** - Sales users in your Act-On account can now receive an alert when a form is submitted by a lead or contact assigned to them or located in their defined territory. You can enable these alerts from Step 2 of any individual form. Lead/contact ownership can be defined on the *Sales Prospects* section of the *Account Lists* listing, and visitor territory of interest is defined on the *Report Content Settings* page, located on the *More* menu of the *Website Visitors* report page.

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- b. **GeoIP information** - Users can now choose to include visitors' GeoIP information – Company/ISP, Area Code, State/Province, Country. GeoIP information is also used to suggest the location of anonymous visitors in the *Website Visitors* report and is based on the current location of the visitor. While this information can vary from known contact details, it can be useful in providing additional information in forms that are not explicitly collecting these values.
- 9. **External Double-Post URL.** Select this to post the form's submission data to another URL; just fill that external URL in here.
- 10. **External Web Analytics Support.** If you use a web analytics service (such as Google Analytics), you can use it also to track visits to this form. Just insert the appropriate tracking code snippet. If you have multiple pieces of tracking code, separate them with a semicolon and one space: 123this; 456that.

If you want visitors to this form to show up on your Act-On Web Visitors Report, then be sure to add the Act-On website tracking code in this field. Get the code here: Website Visitors > More... > Get Code.

Once you have finished specifying your form settings, you can click **Next** or **3. Finish** in the color bar at the top.

STEP 3 – FINISH

This step lets you determine what data will be collected and where the collected data will go. Also, it is the only place where you can **Save** your form.

- At the very top, by default, it will indicate the submitted data will go to a **New List**. The *New List Name* will automatically be generated to reflect the name you gave your form in Step #2. The sign-up list can be found under Lists > Signup Lists in the Default folder.
- You also have the option of having the form submission data be collected to an **Existing List**. To do this, select the *Existing List* radio button and then click the **Select** hyperlink. This will pull up all of your Account Lists, Marketing lists, Signup Lists, and Webinars Lists. Hover over the list you want to add the form submission data to and choose the **Click to Select** link.
- The **Always Append** option, when selected, will create a line record for each form submission. Otherwise, existing records in the signup list will be updated if the person submits the form again. This is done based on an email address association to locate existing records.

Create a New List

When creating a new sign-up list, you will notice four columns: Form Label, Form Field Name, Create List Column? and System Usage.

1. **Form Label** is the label people will see on your form. It is displayed here for your convenience.
2. **Form Field Name** is the Data Field name you specified when creating the form fields. It is displayed here for your reference and will be the title

Note: If you make an edit to an Act-On form that's been iframed on your website, the change will be applied as soon as you save the form edits.



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of the columns in your Signup List.

3. **Create List Column?** has default settings to create a column for each form field. Simply uncheck a box if you don't want Act-On to collect the data.
4. **System Usage** is your opportunity to tell the Act-On system how each field will be used. For example, which field will be your contact's email address, first name, or company? Many of your fields may not have a system usage, especially if they are custom fields.

Use an Existing List

If you select to have form submission go to an existing list, you will notice three columns: Form Label, Form Field Name, and List Column Name.

1. **Form Label** is the label people will see on your form. It is displayed here for your convenience.
2. **Form Field Name** is the data field name you specified when creating the form fields.
3. **List Column Name** is the column your form field will be submitting to. Act-On will attempt to match any form fields you have on your new form to existing columns in the list you have chosen to push form submission data to.

If Act-On can't match the columns because the column does not exist or the names are too dissimilar, a new column will be made. If a new column will be made, you will have both a green plus sign and yellow warning sign appear next to the *List Column Name*.

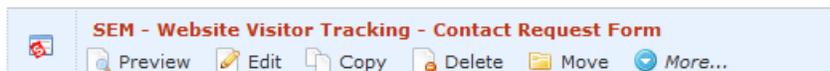
Map Form Fields to List Columns:

Form Label	Form Field Name		List Column Name	
Name & E-Mail	First Name	→	First Name	⊞
	Last Name	→	Last Name	⊞
	Email	→	Email	⊞
Favorite color	Favorite color	+	Favorite color	⊞ ⚠
System Fields	_FORM	+	_FORM	⊞ ⚠
	_CAMPAIGN	+	_CAMPAIGN	⊞ ⚠
	IPADDR	+	IPADDR	⊞ ⚠

Once you have mapped your system usage for the new list or mapped columns to an existing list, make sure to click **Save**.

HOW TO PREVIEW, EDIT, COPY, DELETE, OR MOVE A FORM

Find your new form in **Web Forms**. Hover over the title to display options: *Preview, Edit, Copy, Delete, Move and More...*



1. **Preview.** Select this to view your form as end users will see it.
2. **Edit.** Select *Edit* to make changes to any part of your form in the *Layout, Settings* or *Finish* steps.

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3. **Copy.** Select this to use the existing form as a template and make minor adjustments in a copied version of it. The form serves as a template, giving you the ability to have a new form without needing to create it from scratch.

Some things to keep in mind when using the **Copy** feature: We copy over the form, and all form settings, exactly. Usually certain things need to be changed for the new form. Things to double-check and do if applicable:

- a. In Step #1, change any field label if needed. Add, delete or modify field labels and data field names as appropriate.
 - b. In Step #2, give the form a new title and make edits to any of the settings if needed. Do remember to edit any confirmation email the original form may have had.
 - c. In Step #3, by default copied forms will have the form submission automatically go to the same list as the original form. Make sure to change where the form submission data is going if needed.
4. **Delete.** This allows you to completely delete the form. If you delete the form, the *Signup* list will still exist.
 5. **Move.** Select this to move the form into another folder to help keep your forms organized.
 6. **More...** Select *More...* to view additional form options, which are:
 - a. **Get Public URLs.** As soon as you create a form and save it, the system automatically generates a default URL for you. If you plan to promote the page, you can create Public URLs.

This link allows you to generate as many unique URLs as you like. Use these as trackable links so you can see which sources generate the most form views and submissions. You can also generate SEO-friendly URLs, and shorten and customize URLs.

Be sure to test your form as many times as necessary. Copy and paste the Form URL into a new browser window (or just click Test) to test the form. Fill out the form as though you were a new user. Make sure the form submissions are being captured. If you are pushing or overwriting to your CRM, follow it through and make sure the changes are reflected.

Here, you also have the option to get the HTML code for the Act-On form and embed it within your own (non-Act-On) web page or blog. Within the HTML code provided, we have inserted additional instructions, please follow them closely. These instructions can easily be identified, as they will be cut off from the HTML code by a double line on top and bottom.

To get the form HTML code, simply hover over the Public URL title and click *Get Code*.

- b. **View Form Report.** View this report to see traffic to your form, and the views and submissions from each source. You can also

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- download submissions by each source or download all submissions for the form, regardless of the source.
- c. **Clear Form Report.** Click this to clear out your form views and submissions, and reset it to zero. A good time to use this option is after you have thoroughly tested out your form and it's ready to start capturing true customer data.
 - d. **View Survey Results.** Click this to display responses to preset choice questions (in the radio button, check box, and drop list form fields) in graphical format. This will allow you to easily see how many times each choice was selected.
 - e. **Download Submitted Data.** Click this to quickly download the form-submitted data without having to access it via the *View Form Report* option.
 - f. **Show Underlying List.** Click this to automatically open the list the form was being submitted to in database view.
 - g. **Enable E-Commerce.** Select this to collect payment with form submission. If selected, Act-On will not document a form submission until payment is completed. [Read more.](#)
 - h. **View Salesforce Push Errors.** If your form is being pushed to a CRM, any push errors will display here.
 - i. **Payment Report.** If you are using e-Commerce, this link will show your payments collected.

HOW TO DEPLOY A FORM ON YOUR OWN SITE

Act-On hosts your form so it can collect the data, integrate the data with your CRM, and report your results. If you are distributing your form as a link to be clicked (via email or online advertising, etc.) then you need do nothing more than create one or more URLs to place in appropriate locations.

If you want people to be able to go on your website and fill out the form, you must integrate the form into your site. There are four ways to integrate an Act-On form into your website:

1. Conduct a double post from an existing form on your website to one you've created in Act-On. Note that if you do this, you can continue to use your own forms while also receiving the benefits of using an Act-On form. For more instructions on conducting an external post, click [here](#) for the full article.
 - a. Using the Import function, enter the URL for the form. Act-On pulls the form in so that the form is double-hosted on both your website and on Act-On.
 - b. Note that by default, the submission logic is to the same database the form was feeding. You can check a box to have the data populate your Act-On profiles instead.
2. Iframe the Act-On form directly onto your webpage. [Read more.](#)

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3. Link to an Act-On form directly from your website.
4. Insert the Act-On form's html code directly onto your website.

For more information:

- Visit the Act-On Community [Knowledge Base](#) to read articles and FAQs
- Visit Act-On University and [register](#) for a twice-weekly live, instructor-led class...or watch the 48-minute recorded webinar
- [Watch](#) a 25-minute video in the Act-On University Library

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