



# Creating Forms

## What is the purpose of creating a form?

Forms are a type of landing page that allows partners to generate leads through form submissions. Partners can use forms to execute lead-generating marketing activities, such as email campaigns and banner ads from a single location. By using forms, partners can qualify, manage, and track leads as they are generated.

Forms may also include incentives, such as whitepapers, product brochures, and ebooks, to entice prospects to complete the form and become leads. These incentives can be gated, meaning only available after a form is submitted, or non-gated, meaning always available.

## How do I create them?

When creating forms, start by copying an existing form to use as a framework. Be sure to select a form that mirrors the type of form you want to create. (In other words, the template you select should maintain the same structure as the previous version).

Once copied, update the content & images, form fields, and links within the content tab. Then create a confirmation page and email.

(**Note:** In this lesson, you practice updating several fields within a copied form of your choice. You will not update every field available.)

## What will I do in this lesson?

By the end of this lesson, you will be able to do the following:

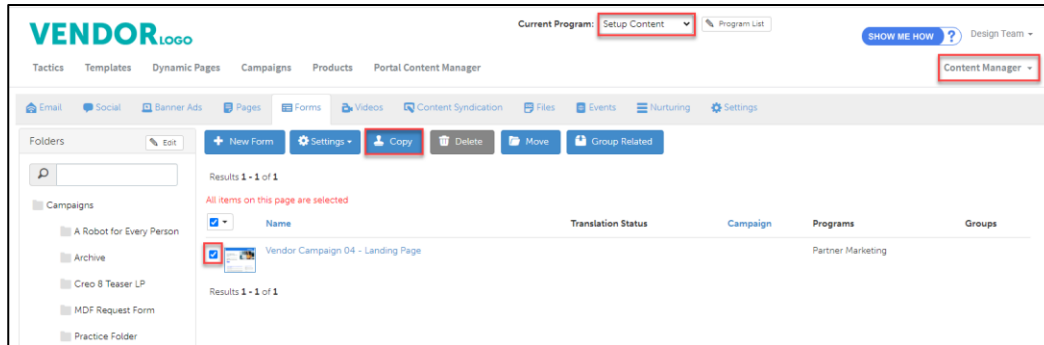
- [Copy a form](#)
- [Create form settings](#)
- [Edit banner content](#)
- [Edit body content](#)
- [Edit links & images](#)
- [Add a form field](#)
- [Create a confirmation page](#)
- [Create a confirmation email](#)
- [Publish Form](#) (This step is for **reference only**. Do not publish practice content created during this onboarding program.)

To complete this lesson, you must download the assets located within the [Building your Content](#) Block. Once downloaded, save each item to your local drive.

## Steps

### COPY EXISTING FORM

- 1 In **Content Manager**, from **Current Program**, select **Setup Content**.
- 2 From the **toolbar**, select **Tactics > Forms**. A list of existing forms appears.
- 3 Place a **checkmark** next to the form you want to copy. Then click **Copy**.



- 4 From the **folder** drop-down menu, select a **folder** to copy your form.

Copy and assign tactics

Give this new tactic a name and then select who you would like to assign this tactic to so they can update it and make any necessary changes.:

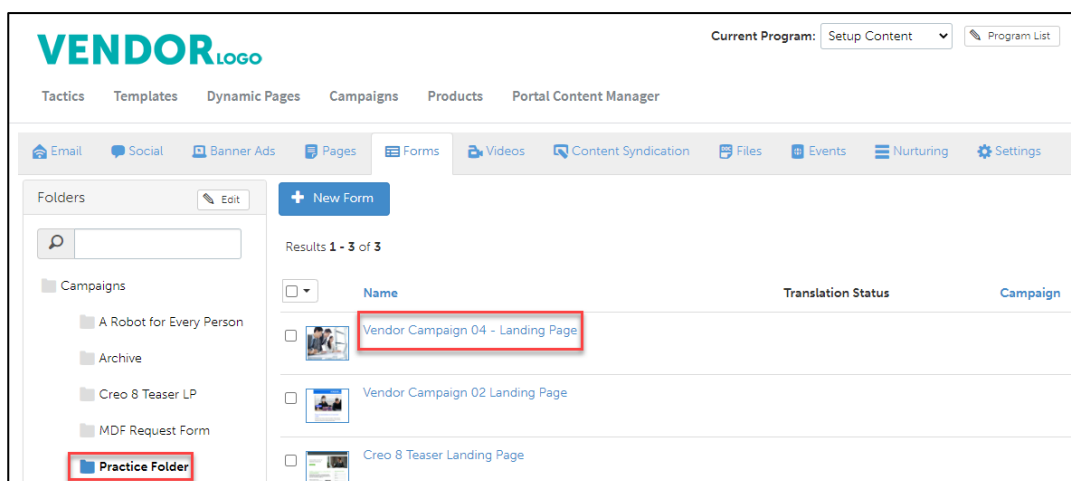
Assigned To:

Folder:

- 5 Click **Save**.

### CREATE FORM SETTINGS

- 1 From the **Folders** panel, select the **folder** that contains your form. Then select the **copied form**.



- 2 From the **toolbar**, select **Settings**.
- 3 In the **Name** field, type **My Practice Form**
- 4 In the **Description** area, type. **This is my practice form.**
- 5 In **Custom Thumbnail**, click **Allow system to overwrite your thumbnail with a generic version.**

The screenshot shows the 'Settings' tab of a campaign configuration interface. The 'Name' field is set to 'My Practice Form' and the 'Description' field contains 'This is my practice form'. The 'Assigned To' dropdown is set to 'Team, Design'. Under 'Campaign Tracking Variables', 'Campaign' is '(none)', 'Source' is 'Bing', and 'Creative' is '(none)'. The 'Thumbnail image' section shows a 'Choose File' button and a note that the file must be in jpg, gif, png format and 200 x 150 pixels. The 'Custom Thumbnail' section has a checkbox labeled 'Allow system to overwrite your thumbnail with a generated version.' which is checked.

**VENDOR**Logo

Tactics Templates Dynamic Pages Campaigns Products Portal Content Manager

Settings Content Assets Confirmation Page Confirmation Email Distribution Advanced Options Page Content

Save Cancel Share

\* Name: My Practice Form  
Original Template: Landing Page Template

Description: This is my practice form

Assigned To: Team, Design

Campaign Tracking Variables

Campaign: (none)  
Source: Bing  
Creative: (none)

Thumbnail image: Choose File No file chosen (File must be in the following formats: jpg, gif, png and 200 x 150 pixels)

Custom Thumbnail: ☒ Allow system to overwrite your thumbnail with a generated version.

- 6 In **Would like to make this available for pulling from the managed library?**, click **Yes**. Additional setting options appear.
- 7 In **Enable testing mode**, click **No**, **disable testing mode, I am sending out this campaign**.
- 8 In **When would you like this to be available in the managed library**, click **Always**.
- 9 In **What program would you like to use the campaign in?**, click **Setup Content**.

10 In **Would you like to limit access based on account profile fields**, click **No**.

Would you like to make this available for pulling from the managed library:

☐ No  
☒ Yes

Enable testing mode: (Note: Make sure you copy all accounts)

☐ Yes, I am still testing this message.  
☒ No, disable test mode I am sending the campaign out.

When would you like this to be available in the managed library?

☒ Always  
☐ Only during the following period

Feature Campaign:

☐ Feature this campaign in the library

What programs would you like to use this campaign in:

☐ CMS-Live  
☐ CMS-Setup  
☐ Partner Marketing  
☒ Setup Content

Would you like to limit access based on account profile fields:

☒ No  
☐ Yes

11 In **What attributes would you like to set for this asset?** select **all attributes**.

What attributes would you like to set for this asset:

\* Languages

☐ All  
☒ English (United States)  
☐ English (United Kingdom)  
☐ Spanish

\* Marketing Focus

☒ All  
☐ Prospects  
☐ Existing Customers  
☐ Enterprise  
☐ SMB

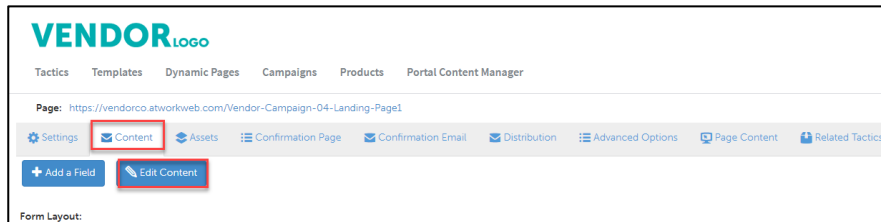
Save  Cancel

12 Click **Save**.

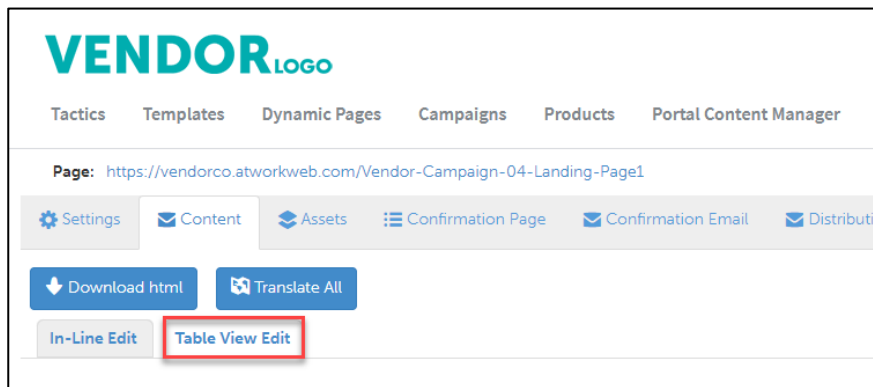
## EDIT BANNER CONTENT

1 **Note:** In this section, practice updating banner heading and content. The fields in which you enter the content may differ, depending on the form from which you are building.

2 From the **Forms** toolbar, select **Content > Edit Content**.








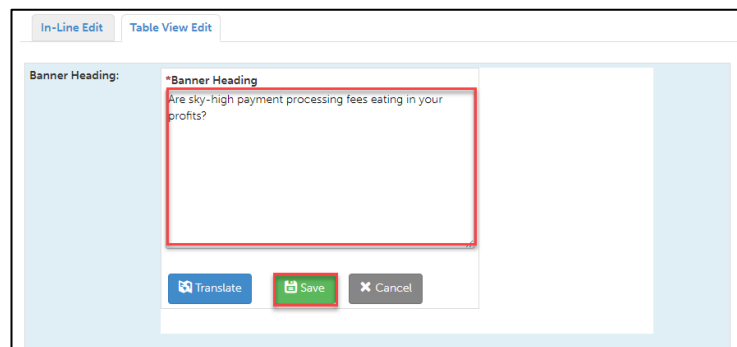
3 Select **Table View Edit**.



4 To update a banner heading, in the appropriate row, click **Edit**. Then copy and paste:

**Are sky-high payment processing fees eating into your profits?**

Banner Heading:	Are sky-high payment processing fees eating into your profits?	
Banner Sub-Heading:	Our customers save an average of \$10K in fees annually. Switch to Vendor X and pay one low fixed rate.	
Banner CTA Link:	#formarea	
Banner CTA:	Get a Quote	
Welcome Area:		



5 Click **Save**.

- 7 To update banner content, in the appropriate row, click **Edit**. Then copy and paste:

**Our customers save an average of \$30K in fees annually Switch to Vendor X and pay one low fixed rate.**

Banner Heading:	Are sky-high payment processing fees eating in your profits?	Edit
Banner Sub-Heading:	Our customers save an average of \$30K in fees annually Switch to Vendor X and pay one low fixed rate.	Edit
Banner CTA Link:	#formarea	Edit
Banner CTA:	Get a Quote	Edit
Welcome Area:		Edit

Banner Heading:	Are sky-high payment processing fees eating in your profits?	Edit
Banner Sub-Heading:	<div><b>Banner Sub-Heading</b> Our customers save an average of \$30K in fees annually Switch to Vendor X and pay one low fixed rate.</div>	
<div><div>Translate</div><div>Save</div><div>Cancel</div></div>		

- 7 Click **Save**.
- 7 Click **Save & Refresh Preview**. Review your changes in the preview pane on the right side of the page.

Save & Refresh Preview

[MarketAsset12321]

VENDOR<sub>LOGO</sub>

## EDIT BODY CONTENT

- 1 **Note:** In this lesson, you practice updating body content. The fields in which you enter the content may differ, depending on the form from which you are building.
- 2 From the **Forms** toolbar, select **Content > Edit Content**.

VENDOR<sub>LOGO</sub>

Tactics Templates Dynamic Pages Campaigns Products Portal Content Manager

Page: https://vendorco.atworkweb.com/Vendor-Campaign-04-Landing-Page1

Settings

Content

Assets

Confirmation Page

Confirmation Email

Distribution

Advanced Options

Page Content

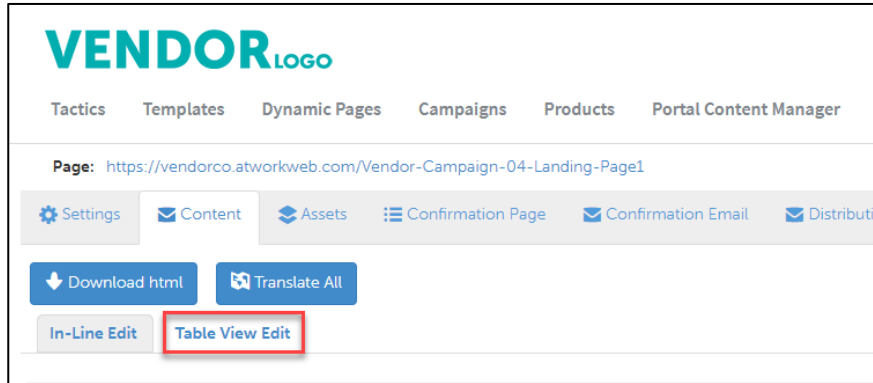
Related Tactics

+ Add a Field

Edit Content

Form Layout:

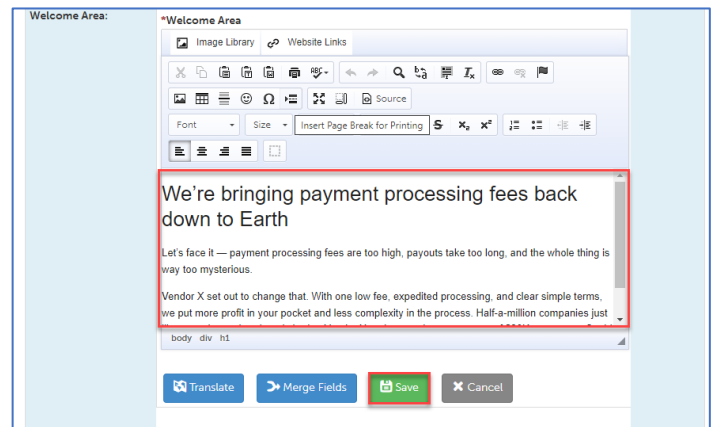
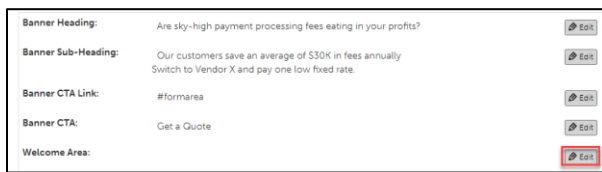
### 3 Click **Table View Edit**.



### 4 To update Body content, cli, click Edit. Then copy & paste:

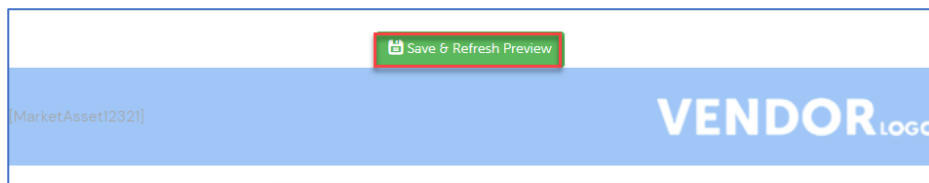
**We're bringing payment processing fees back down to Earth**

Vendor X set out to change that. With one low fee, expedited processing, and clear simple terms, we put more profit in your pocket and less complexity in the process. Half-a-million companies just like yours have already switched to Vendor X and are saving an average of \$30K every year. Could be your time to join them.



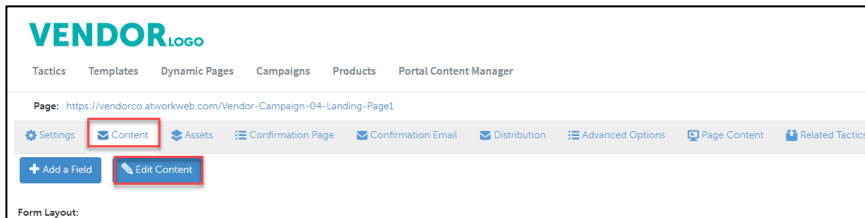
### 5 Click **Save**.

### 6 Click **Save & Refresh Preview**. Review your changes in the preview pane on the right side of the page.

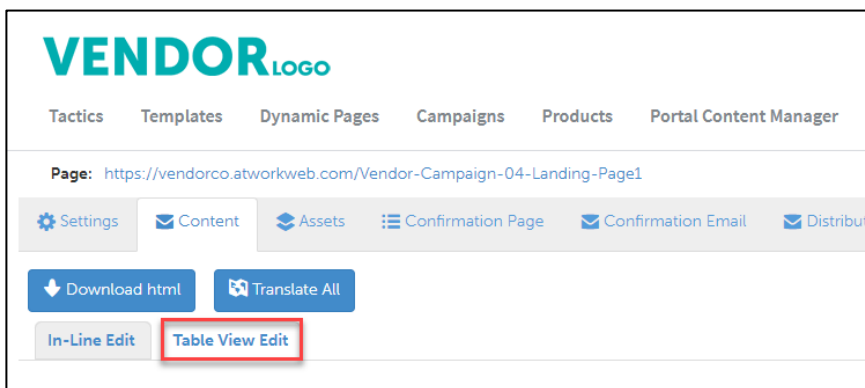


## EDIT LINKS & IMAGES

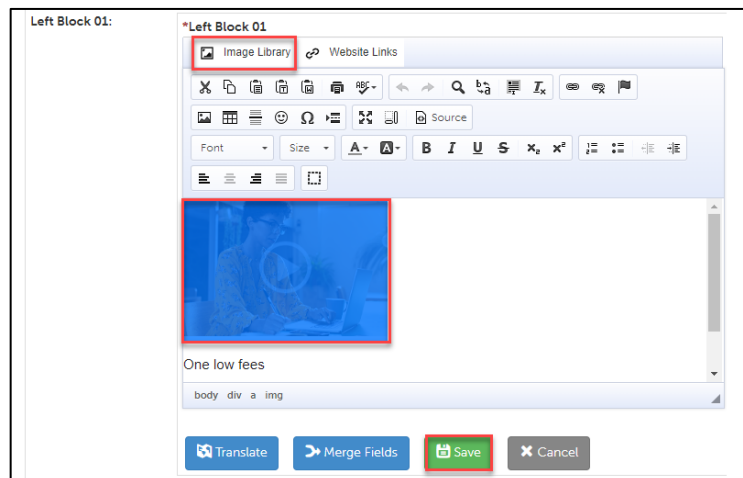
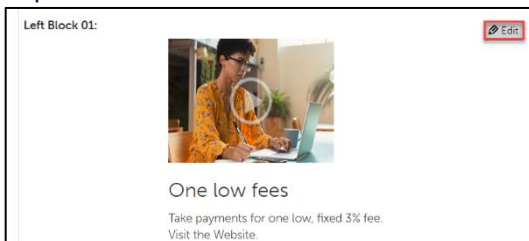
- 1 Note: In this lesson, you practice updating links & images. The fields in which you enter the content may differ, depending on the form from which you are building.
- 2 From the **Forms** toolbar, select **Content > Edit Content**.



- 3 Click **Table View Edit**.



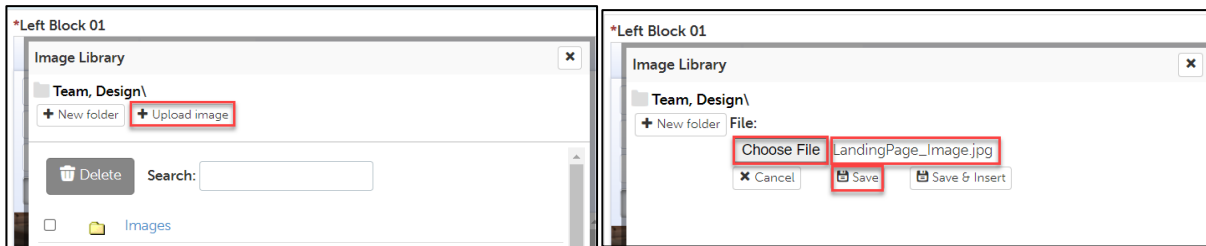
- 4 In the appropriate row, click **Edit**. Click to highlight the **image**, then click **Image Library**. A box opens.



- 5 Click **Save**.



- 6 Click **Upload Image > Choose File**. Then select **LandingPage\_Image.png** from your local drive. (Note: this image is included in your download packet)



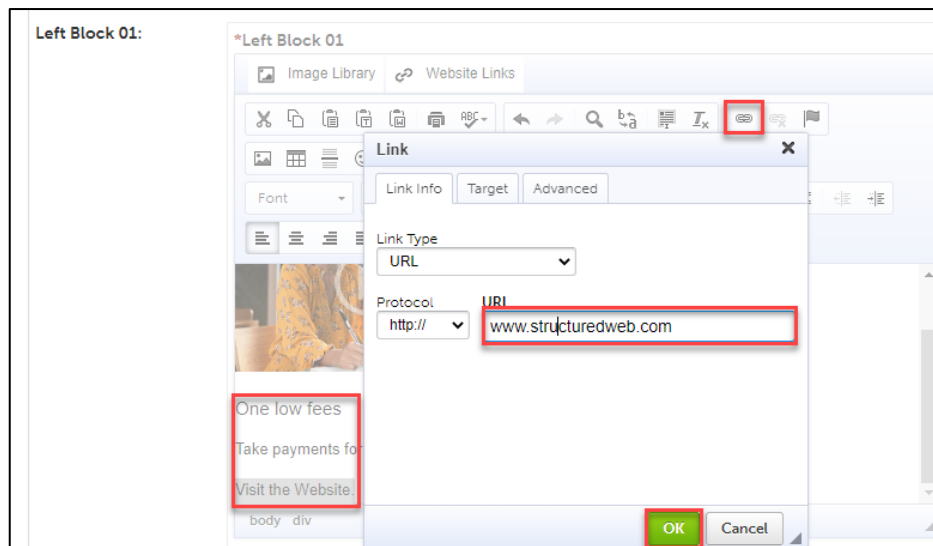
- 7 Click **Save & Insert**.
- 8 Underneath the new image, copy and paste the following:

**One low fee**

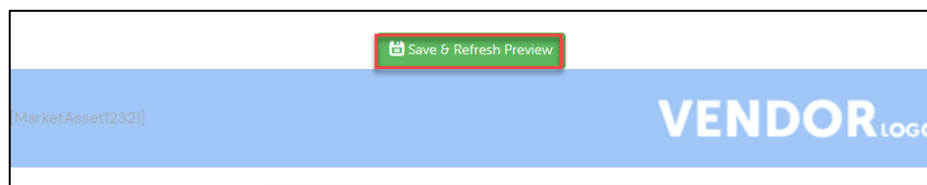
**Take payments for one low, fixed 3% fee.**

**Visit the website.**

- 9 Highlight **Visit the website**. Then click the link icon. Copy and paste [www.structuredweb.com](http://www.structuredweb.com).

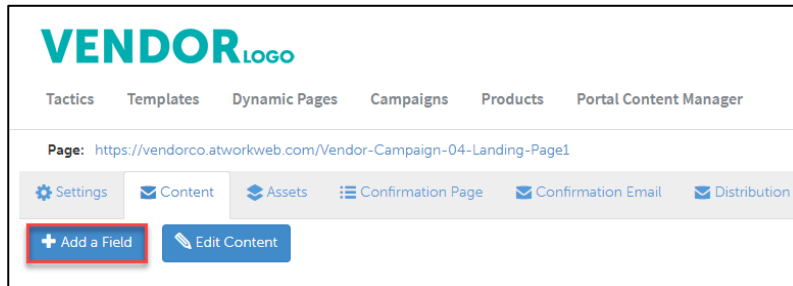


- 10 Click **OK**.
- 11 Click **Save & Refresh Preview**. Review your changes in the preview pane on the right side of the page.

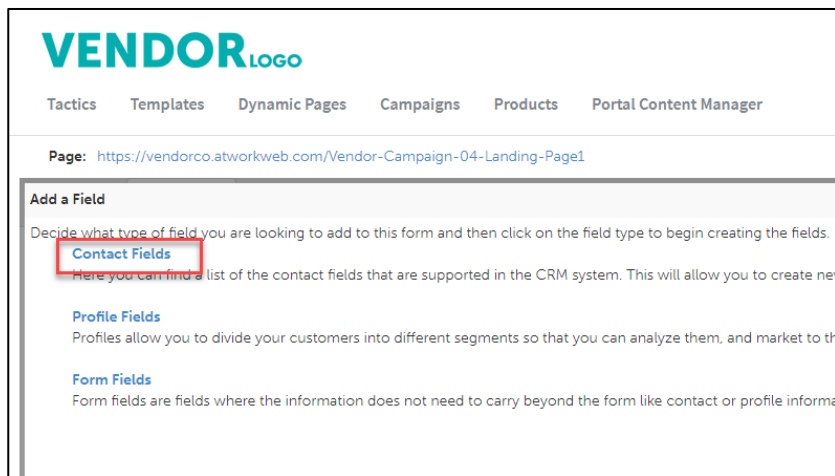


## ADD FORM FIELD

- 1 From the **Form** toolbar, select **Content > Add a Field**.



- 2 From the **Add a Field** box, select the **Contact field**.



- 3 On the **On Form** column, next to **Country**, check the **box**.

**VENDOR**Logo

Tactics Templates Dynamic Pages Campaigns Products Portal Content Manager

Page: <https://vendorco.atworkweb.com/Vendor-Campaign-04-Landing-Page1>

**Add a Field**

To add contact fields to the form just check the boxes in the ON FORM column. If you would like to make those field

Save

On Form	Required	Field	Rename
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Company	<input type="text"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	First Name	<input type="text"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Last Name	<input type="text"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Phone Number	<input type="text"/>
<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Email Address	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	Address	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	City	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	State	<input type="text"/>
<input type="checkbox"/>	<input type="checkbox"/>	Province/Region	<input type="text"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	Country	<input type="text"/>

- 4 Click **Save**.
- 5 On the **Form**, drag and drop the **Country** field, to the **bottom** of the Form. Review your changes in the preview pane on the right side of the page.

**FIND A BRAND Y PARTNER**

\*Required Fields

☒ \*First Name ☒ Country

☒ \*Last Name

☒ \*Phone Number

☒ \*Email Address

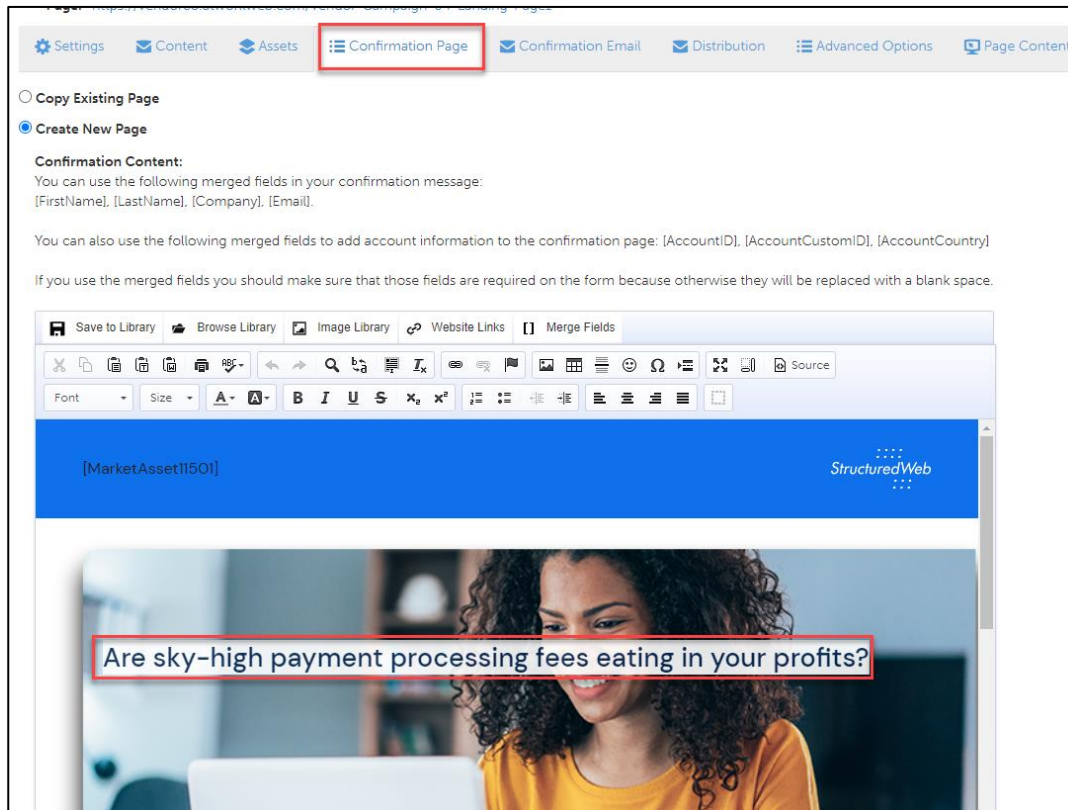
☒ \*Company

[Click here](#) to view the [MarketAsset11502] privacy policy.

## CREATE CONFIRMATION PAGE

- 1 From the **Form** toolbar, click **Confirmation Page**.
- 2 Select **Create New Page**.
- 3 In the **Text** box, on the **banner image**, copy and paste:

**Are sky-high payment processing fees eating into your profits?**



- 4 Click **Save**.

## CREATE CONFIRMATION EMAIL

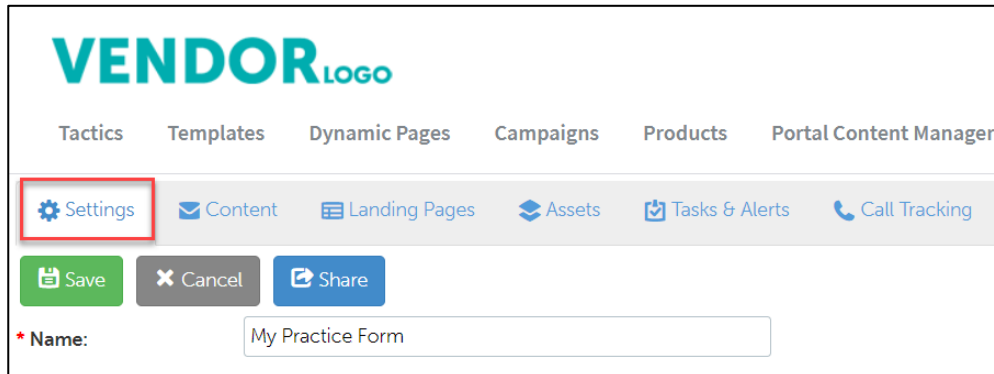
- 1 From the **Form** toolbar, click **Confirmation Email**.
- 2 In **Would you like to send an email confirmation to the customer that filled out the form?**, select **Yes**.

The screenshot shows the 'Vendor Campaign' configuration interface. At the top, there's a navigation bar with 'Tactics', 'Templates', 'Dynamic Pages', 'Campaigns', 'Products', and 'Portal Content Manager'. Below this, the page URL is 'https://vendorco.atworkweb.com/Vendor-Campaign-04-Landing-Page1'. A secondary navigation bar includes 'Settings', 'Content', 'Assets', 'Confirmation Page', 'Confirmation Email' (highlighted with a red box), 'Distribution', 'Advanced Options', 'Page Content', and 'Related Tactics'. The main content area contains instructions on using merged fields for email content. It asks 'Would you like to send an email confirmation to the customer that filled out this form?' with 'Yes' selected (highlighted with a red box) and 'No' as an option. Below this, there are radio buttons for 'Send HTML Email' (selected) and 'Send Text Only Email'. An 'Email Subject' field contains 'Thank you for submitting your request'. The 'Page Content' section shows a rich text editor with a toolbar and the following text: 'Dear [FirstName],', 'Thank you for taking the time to fill out our form.', 'Sincerely,', and '[UserFirstName] [UserLastName]'.

- 3 Click **Save**.

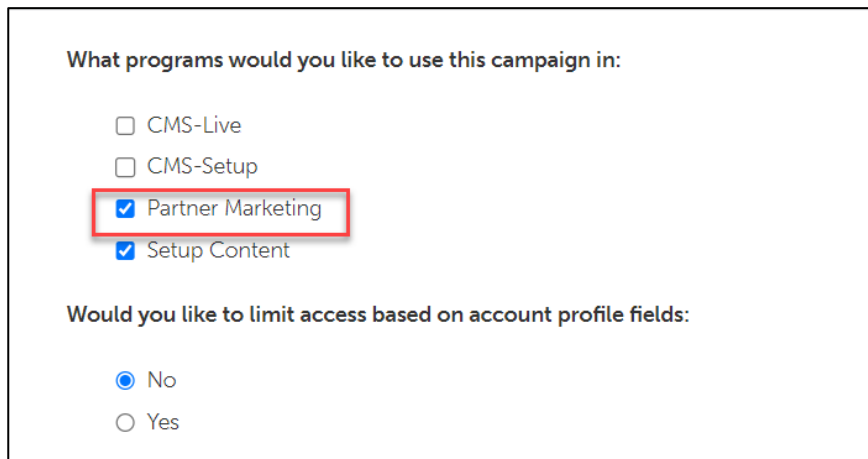
## ACTIVATE FORM

- 1 From the **Form toolbar**, select **Settings**.



The screenshot shows the Vendor Logo interface. At the top is the 'VENDOR Logo' header. Below it is a navigation bar with tabs: Tactics, Templates, Dynamic Pages, Campaigns, Products, and Portal Content Manager. A secondary toolbar contains icons for Settings (highlighted with a red box), Content, Landing Pages, Assets, Tasks & Alerts, and Call Tracking. Below this are three buttons: Save (green), Cancel (grey), and Share (blue). At the bottom, there is a label '\* Name:' followed by a text input field containing 'My Practice Form'.

- 2 From **What programs would you like to use this campaign in**, select the **appropriate program**. (in most cases, this will be Partner Marketing).



The screenshot shows a form section titled 'What programs would you like to use this campaign in:'. It contains four checkboxes: CMS-Live, CMS-Setup, Partner Marketing (checked and highlighted with a red box), and Setup Content (checked). Below this is another section titled 'Would you like to limit access based on account profile fields:' with two radio buttons: No (selected) and Yes.

- 3 Click **Save**.