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 Do not publish practice content created during this onboarding program**.)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.

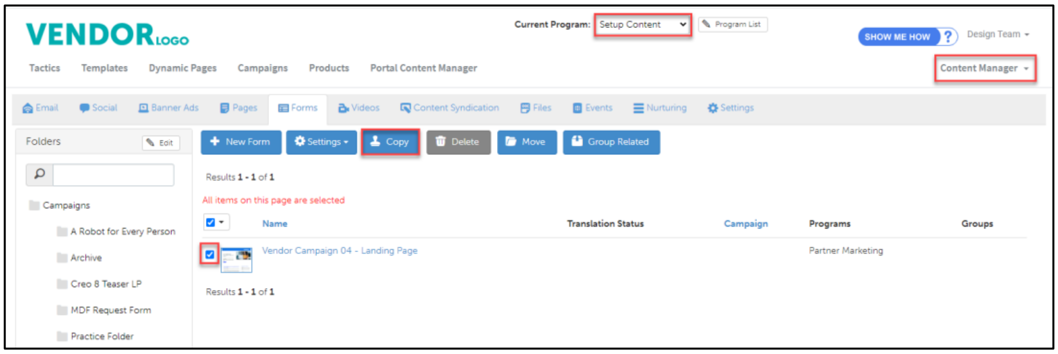
Steps

COPY EXISTING FORM

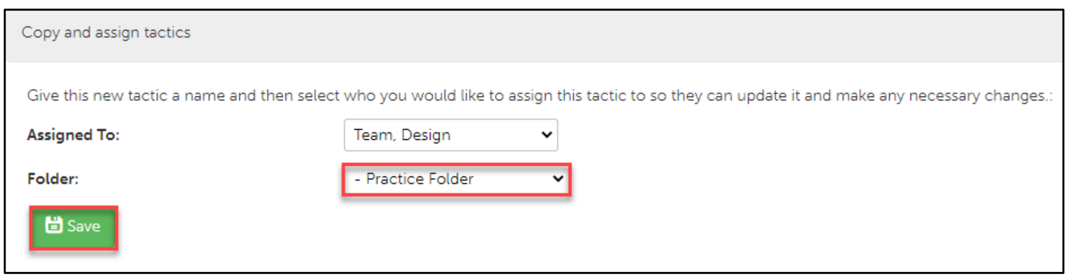
1 In **Content Manager**, from **Current Program**, select **Setup Content**.

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**.



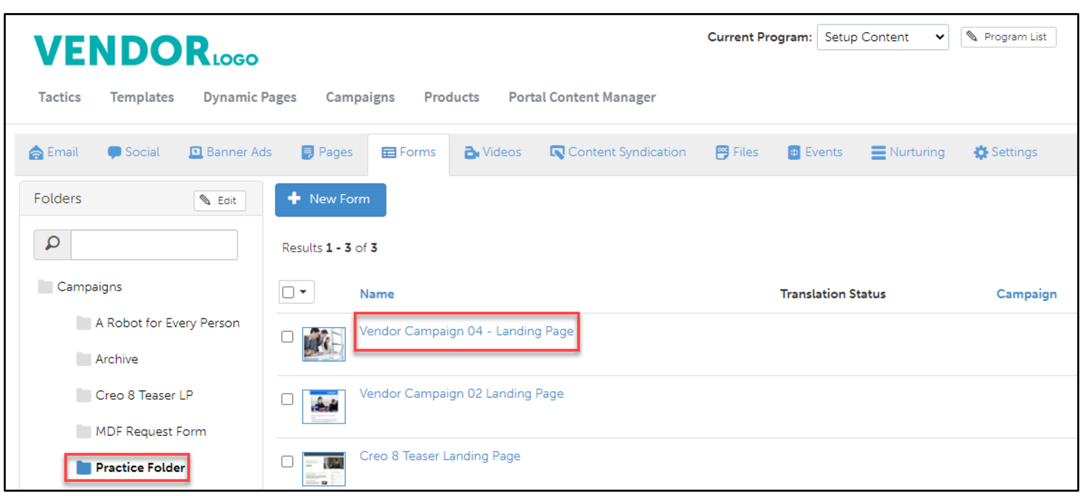
4 From the **folder** drop-down menu, select a **folder** to copy your form.



5 Click **Save**.

CREATE FORM SETTINGS

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

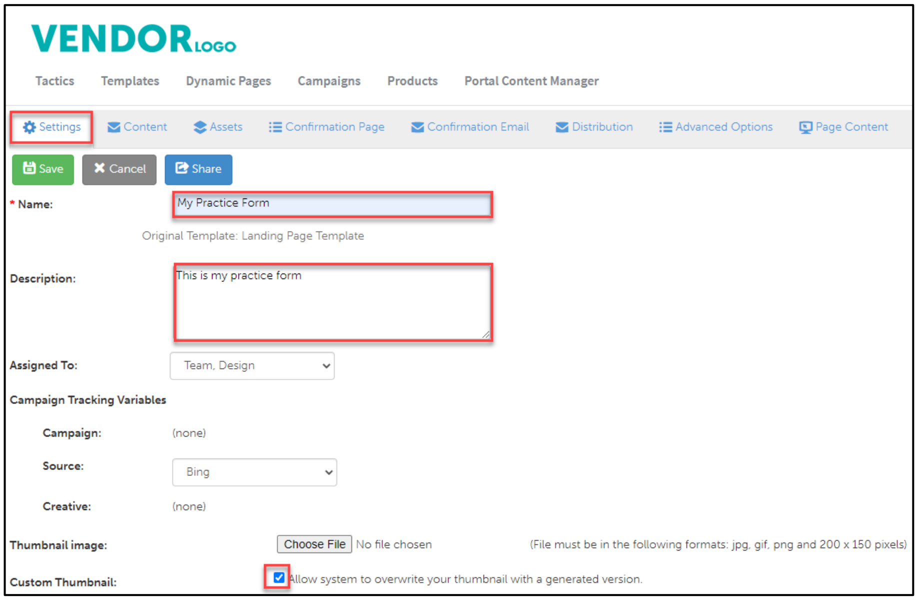


2 From the **toolbar**, select **Settings**.

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.**



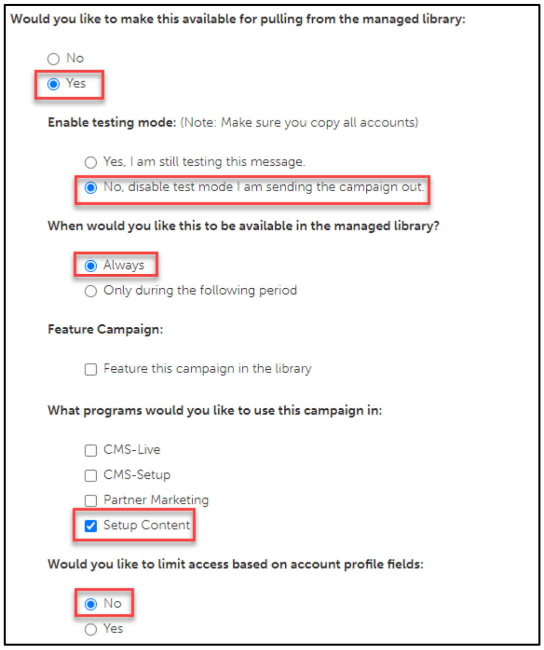
6 In **Would like to make this available for pulling from the managed library?,** click **Yes**. Additional setting options appear.

7 In **Enable testing mode**, click **No, disable testing mode, I am sending out this campaign**.

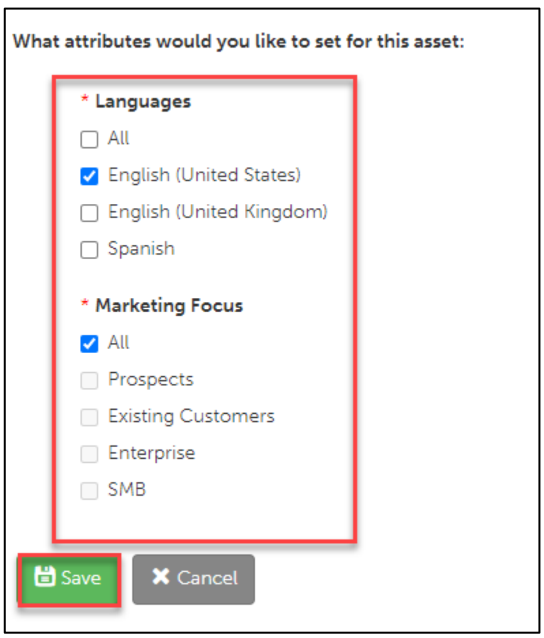
8 In **When would you like this to be available in the managed library**, click **Always**.

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.**



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

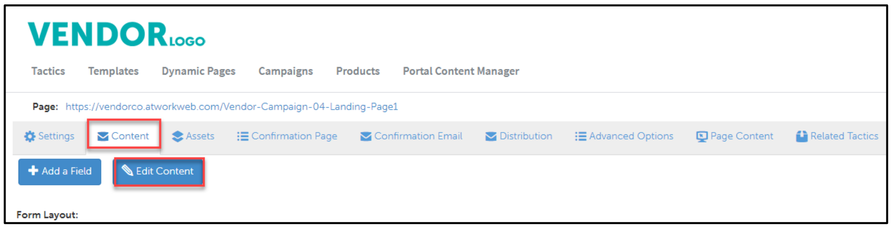


12 Click **Save**.

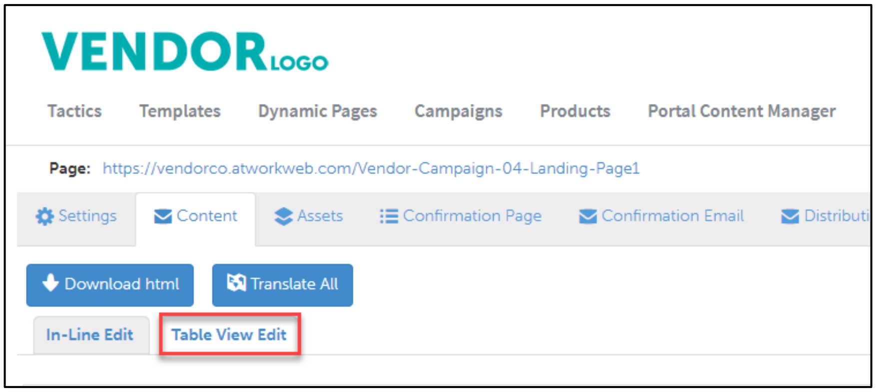
EDIT BANNER CONTENT

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.**

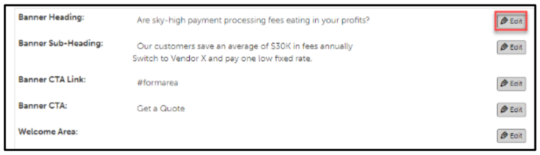


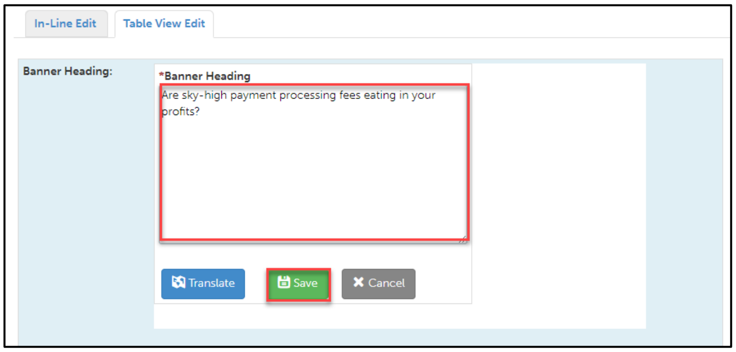
3 Select **Table View Edit**.



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?

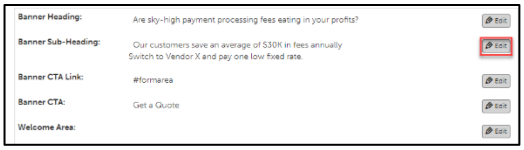


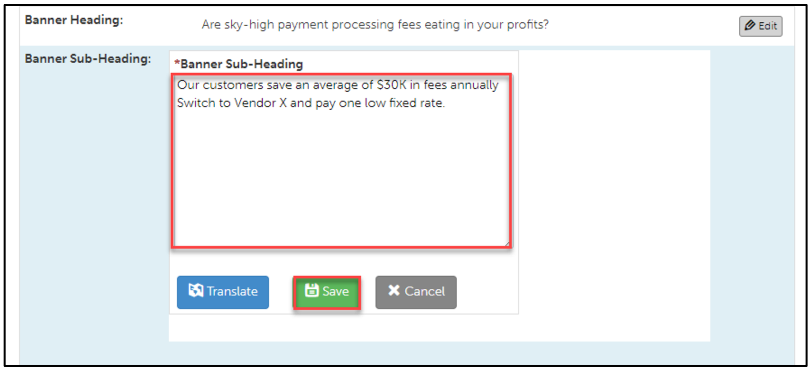


5 Click **Save**.

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

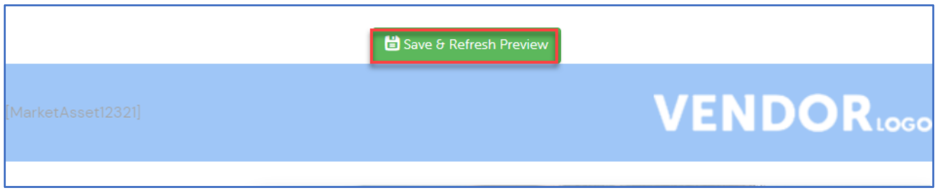
Our customers save an average of $30K in fees annually Switch to Vendor X and pay one low fixed rate.





7 Click **Save**.

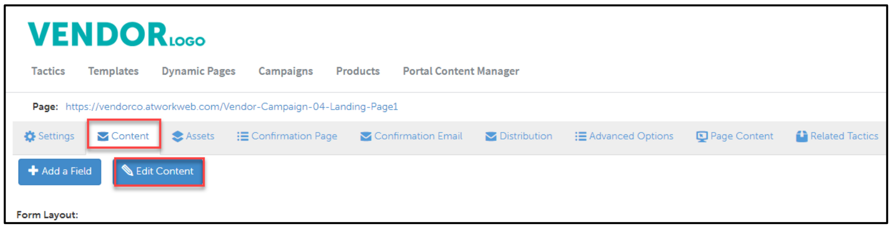
7 Click **Save & Refresh Preview**. Review your changes in the preview pane on the right side of the page.



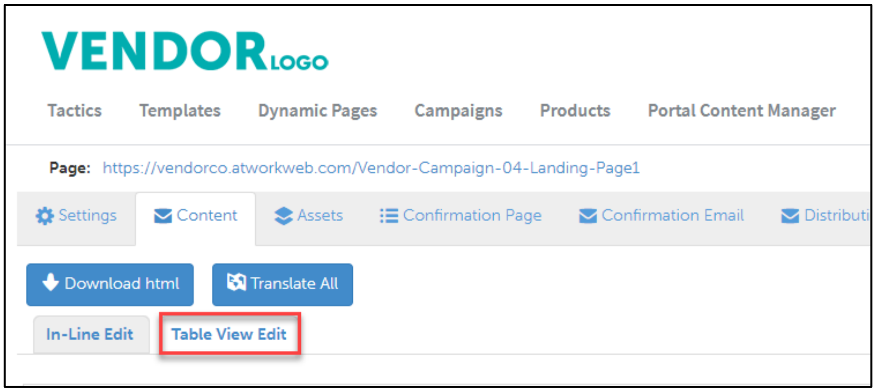
EDIT BODY CONTENT

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**.



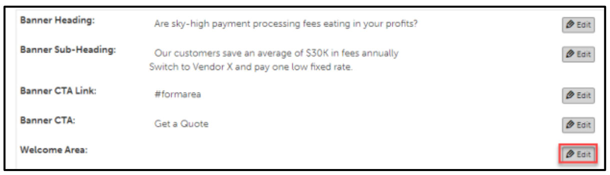
3 Click **Table View Edit**.

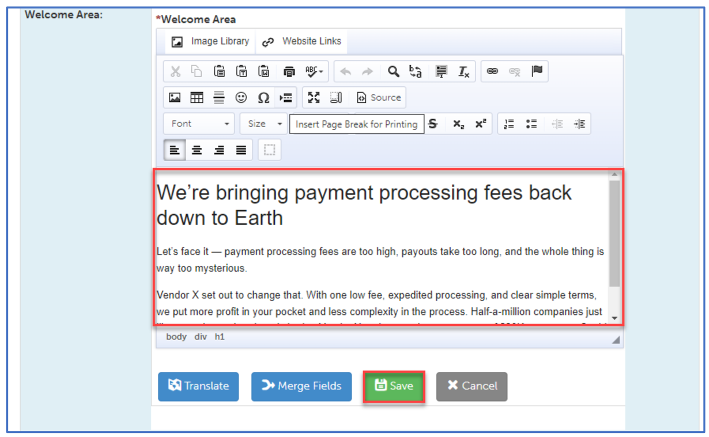


4 To update Body content, cli, click Edit. Then copy & paste:

We're bringing payment processing fees back down to Earth

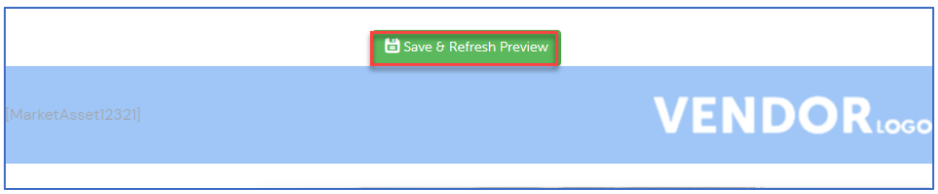
Vendor X set out to change that. With one low fee, expedited processing, and clear simple terms, we put more profit in your pocket and less complexity in the process. Half-a-million companies just like yours have already switched to Vendor X and are saving an average of $30K every year. Could be your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





5 Click **Save**.

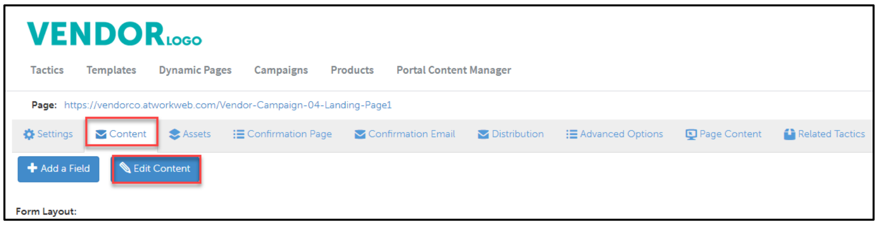
6 Click **Save & Refresh Preview.** Review your changes in the preview pane on the right side of the page.



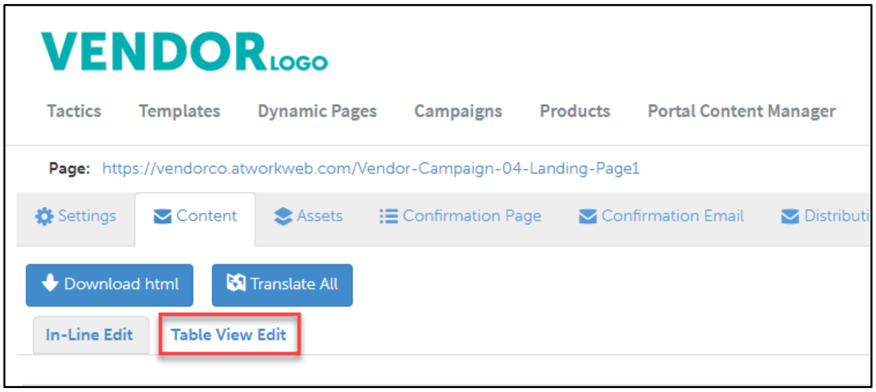
EDIT LINKS & IMAGES

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.

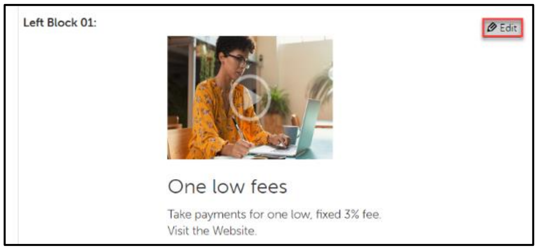
2 From the **Forms** toolbar, select **Content > Edit Content.**

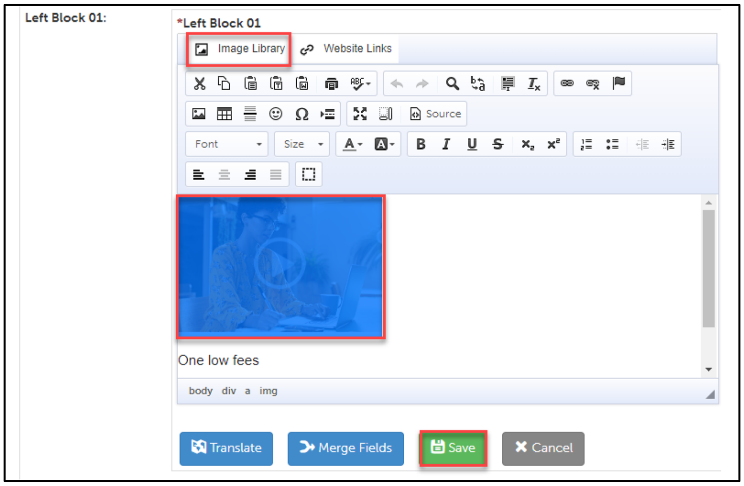


3 Click **Table View Edit.**



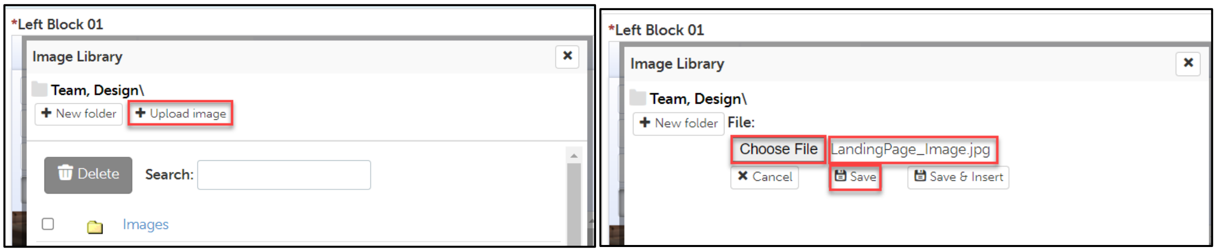
4 In the appropriate row, click **Edit**. Click to highlight the **image, t**hen click **Image Library**. A box opens.





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)



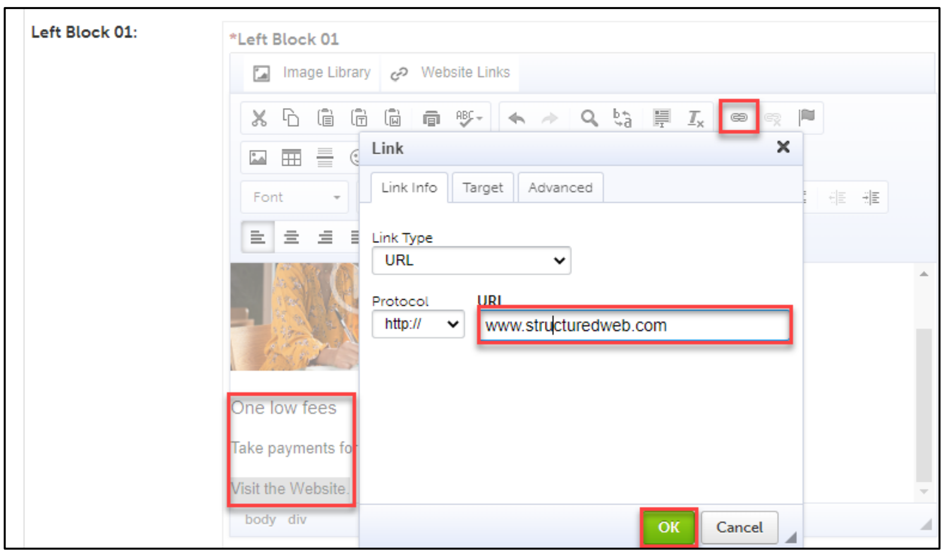
7 Click **Save & Insert**.

8 Underneath the new image, copy and paste the following:

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

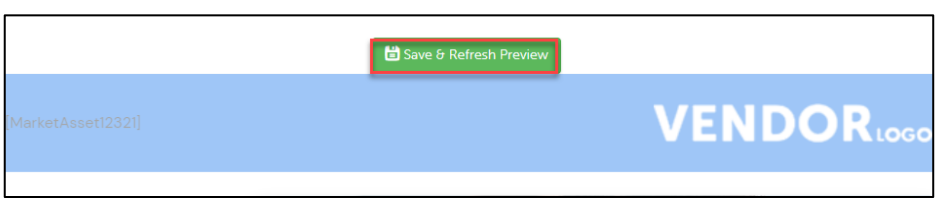
Visit the website.

9 Highlight **Visit the website**. Then click the link icon. Copy and paste www.structuredweb.com.



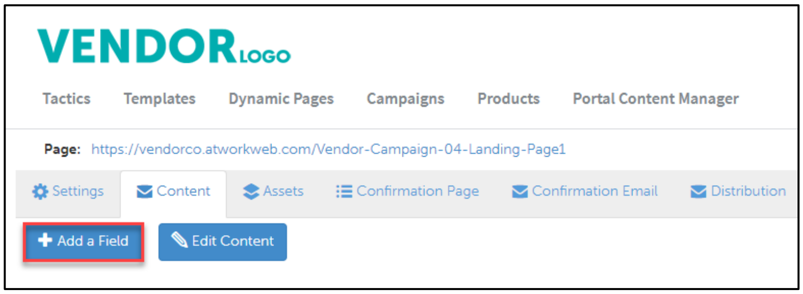
10 Click **OK.**

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

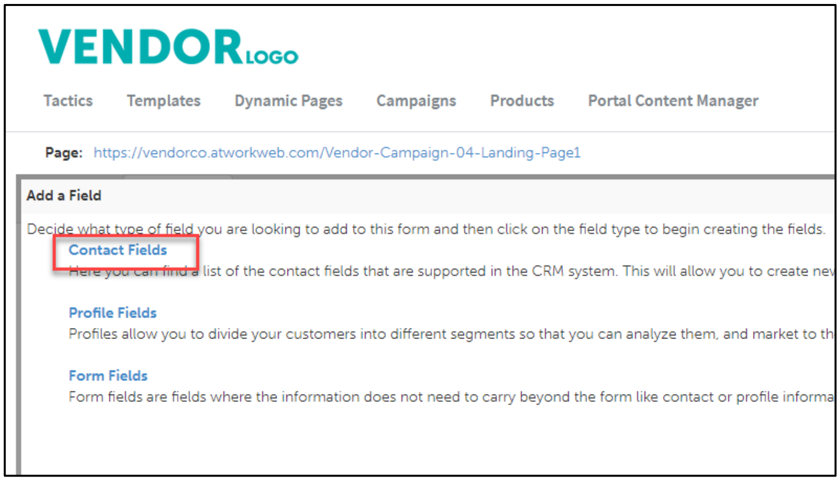


ADD FORM FIELD

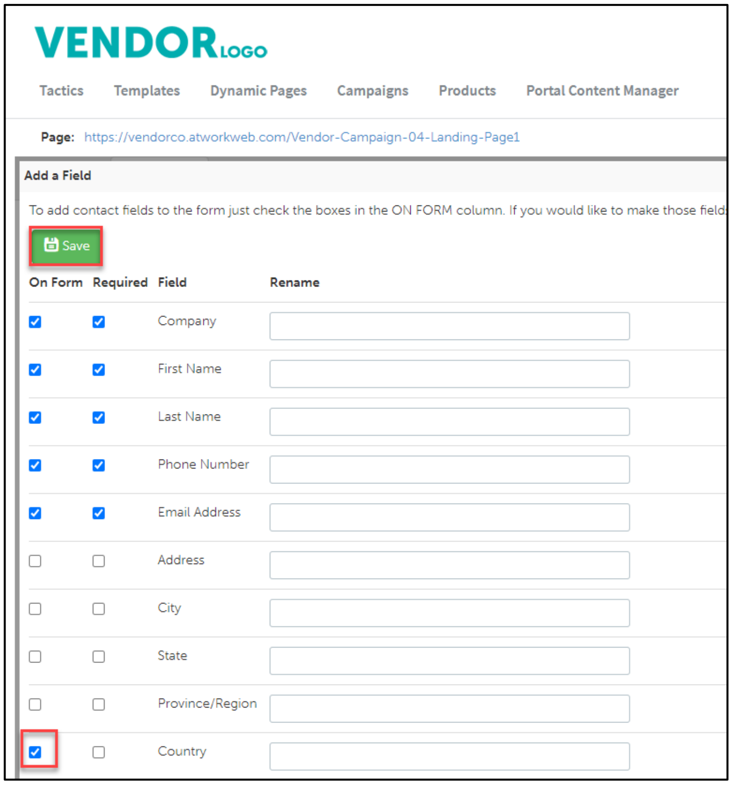
1 From the **Form** toolbar, select **Content > Add a Field.**



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

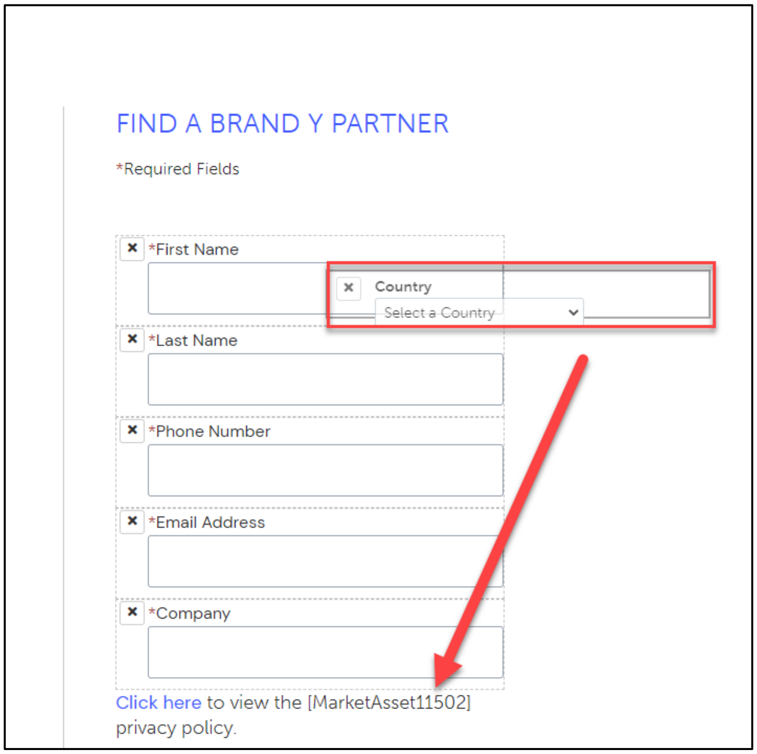


3 On the **On Form** column, next to **Country**, check the **box.**



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.



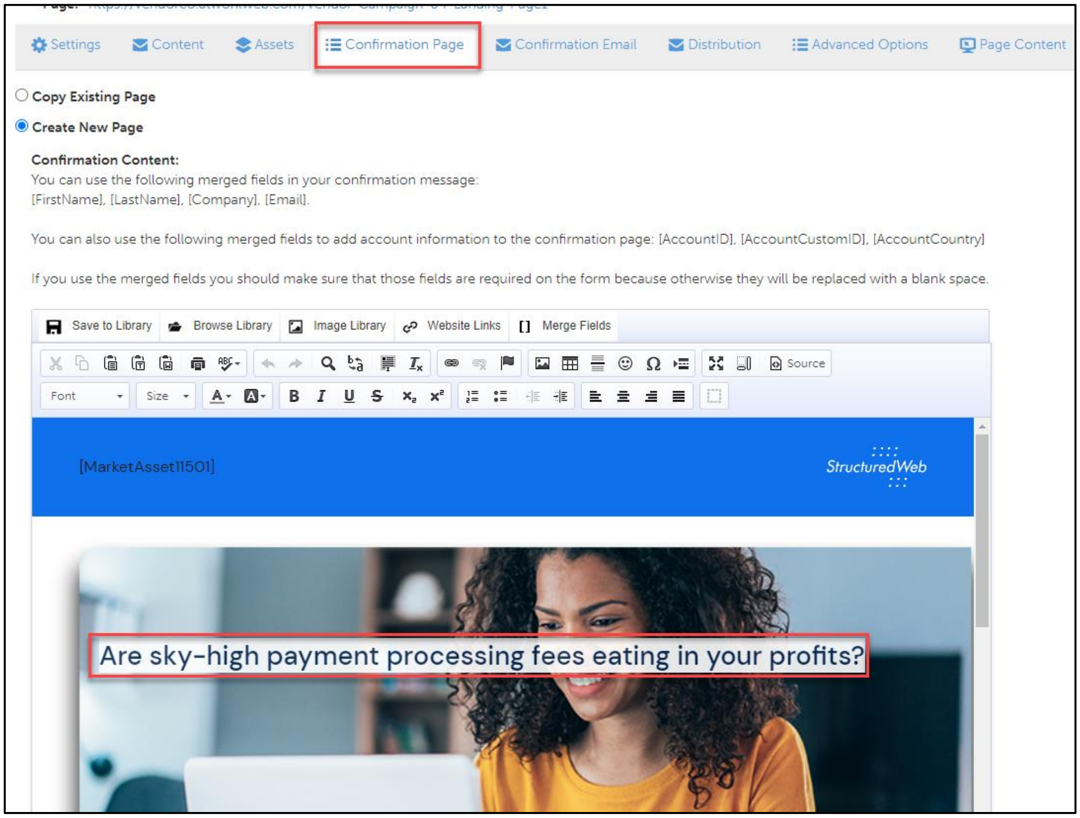
CREATE CONFIRMATION PAGE

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?

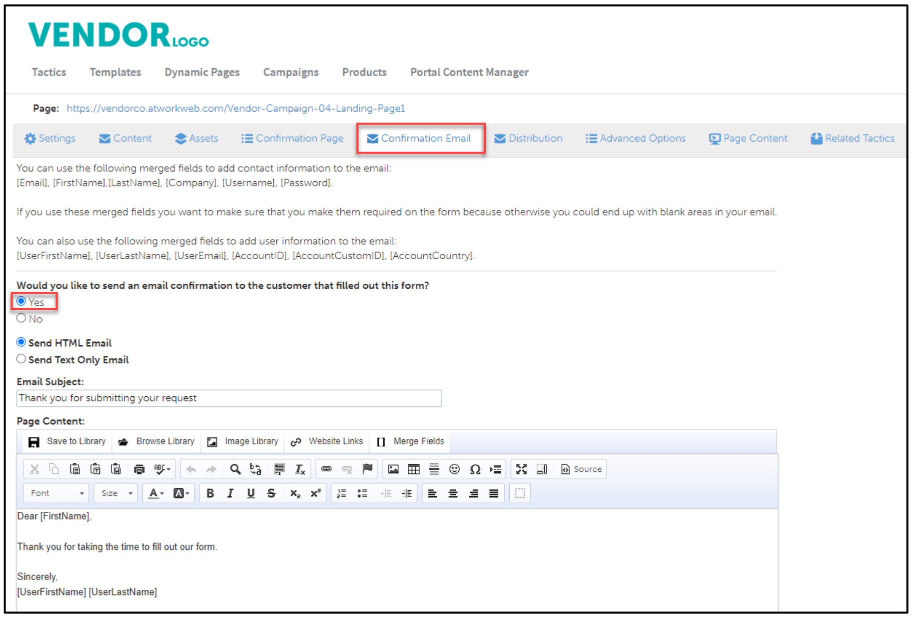


4 Click **Save**.

CREATE CONFIRMATION EMAIL

1 From the **Form** toolbar, click **Confirmation Email.**

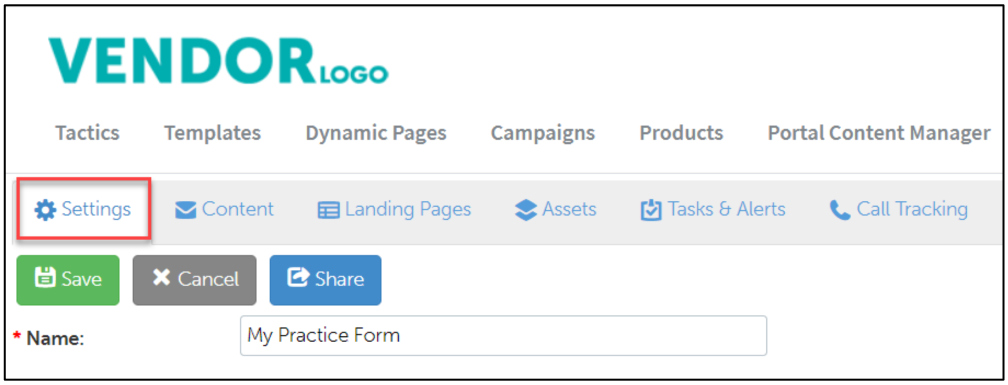
2 In **Would you like to send an email confirmation to the customer that filled out the form?**, select Yes.



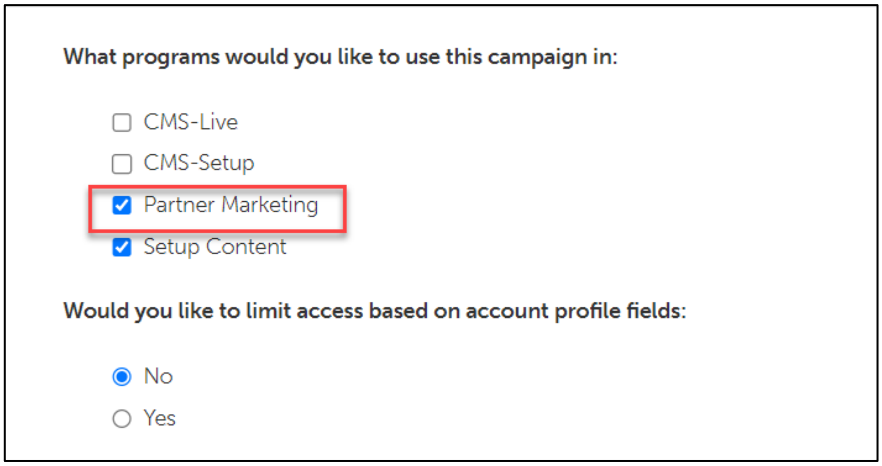
3 Click **Save**.

ACTIVATE FORM

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



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



3 Click **Save**.