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, i.e., headers & footers, 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.

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
- Add a form field
- Edit a confirmation page banner
- Edit a confirmation page body
- 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 Do not publish practice content created during this onboarding program**.)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.

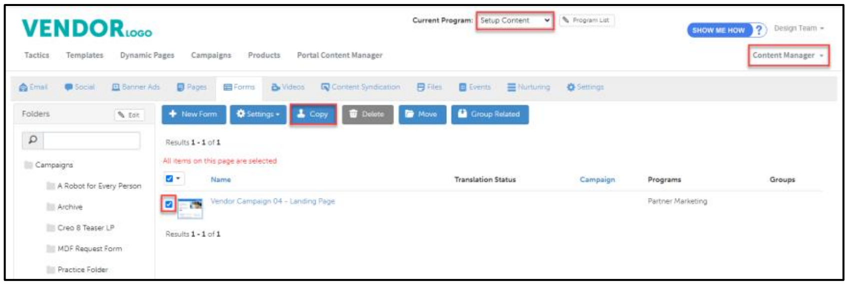
Steps

COPY EXISTING FORM

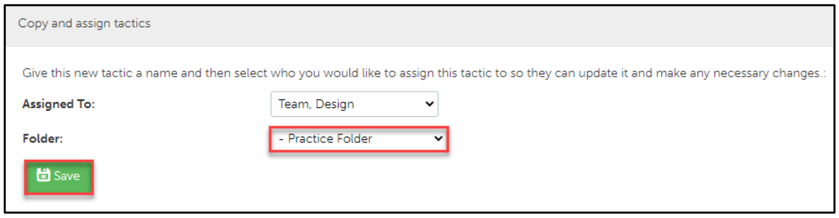
1 In **Content Manager**, from **Current Program**, select **Setup Content**.

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**.



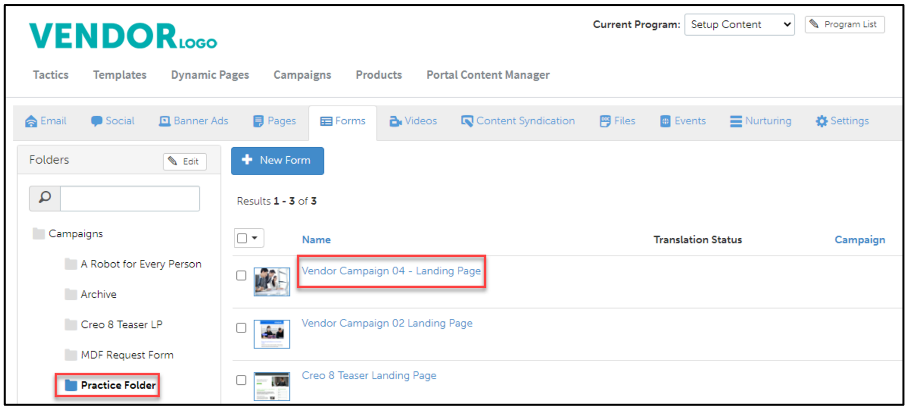
4 From the **folder** drop-down menu, select a **folder** to copy your form.



5 Click **Save**.

CREATE FORM SETTINGS

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

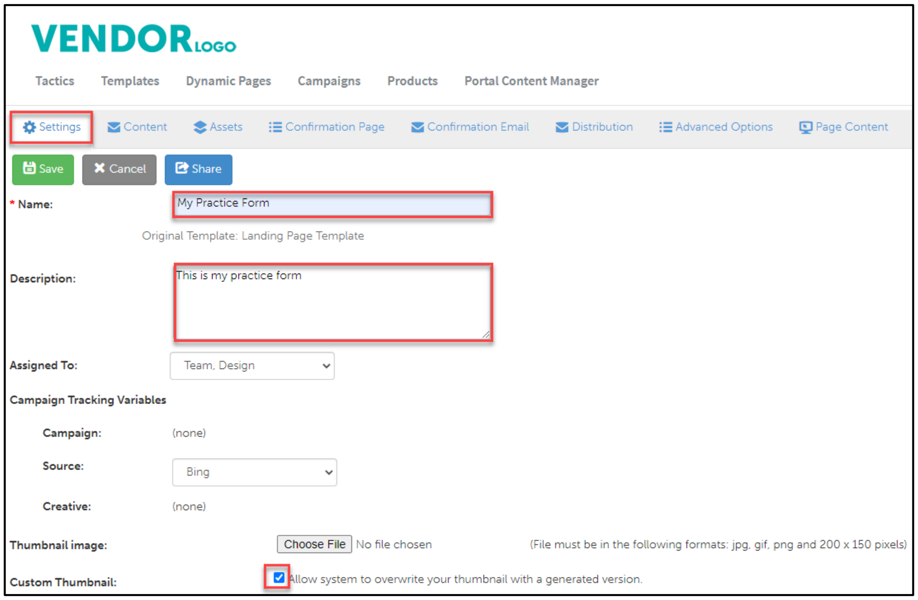


2 From the **toolbar**, select **Settings**.

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.**



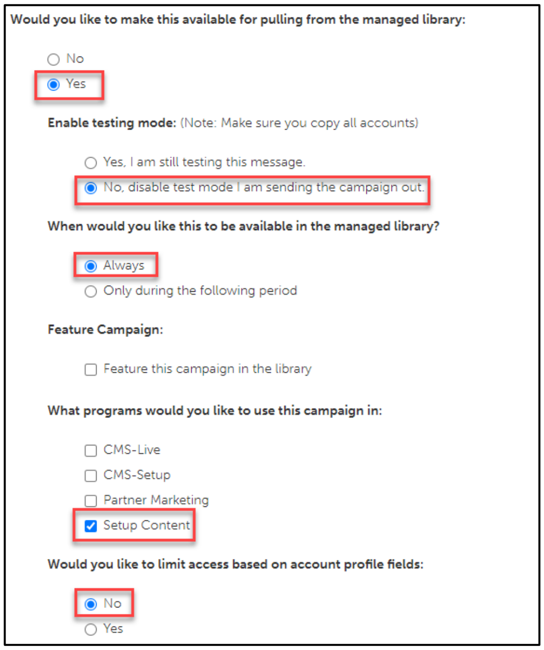
6 In **Would like to make this available for pulling from the managed library?,** click **Yes**. Additional setting options appear.

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

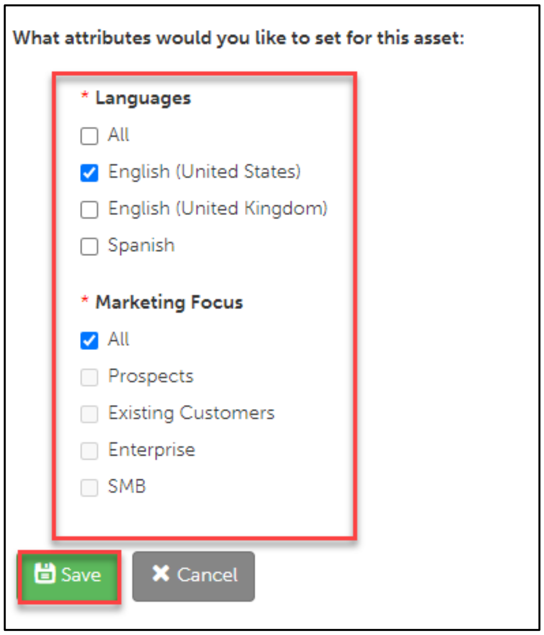
8 In **When would you like this to be available in the managed library**, click **Always**.

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.**



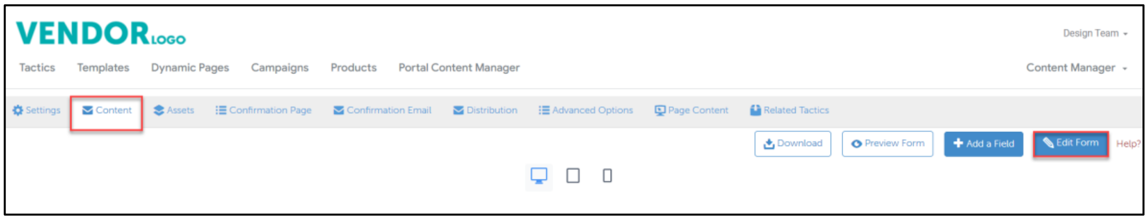
11 In **What attributes would you like to set for this asset?** select **all attributes**.



12 Click **Save**.

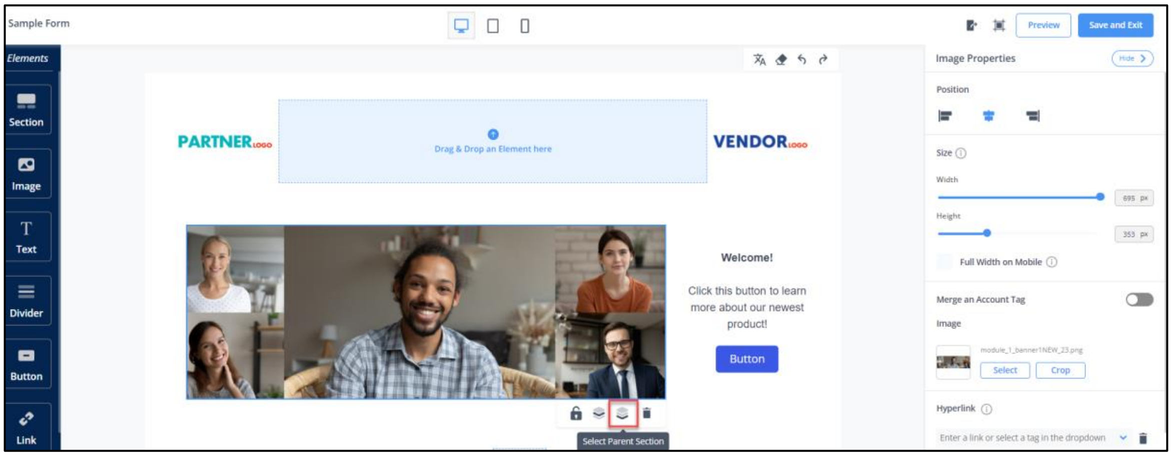
EDIT BANNER CONTENT

1 From the **Forms** toolbar, select **Content > Edit Form.** This launches the Drag & Drop Editor.

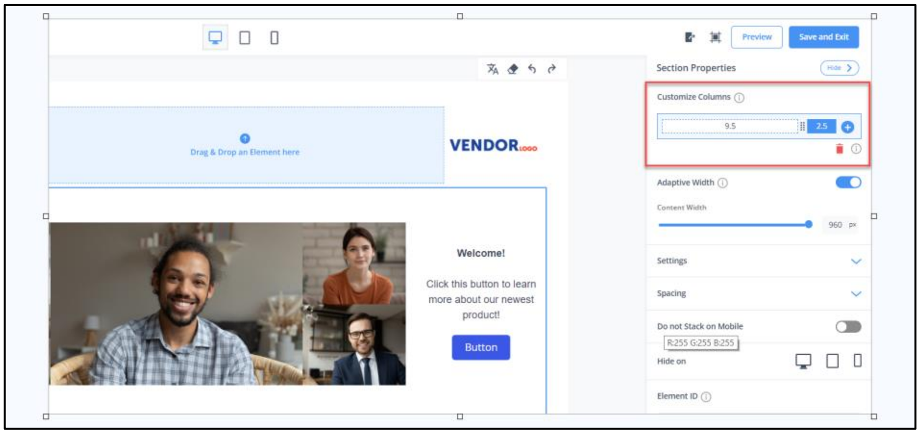


2 On the canvas, click **inside the header**. Icons appear at the bottom of the section.

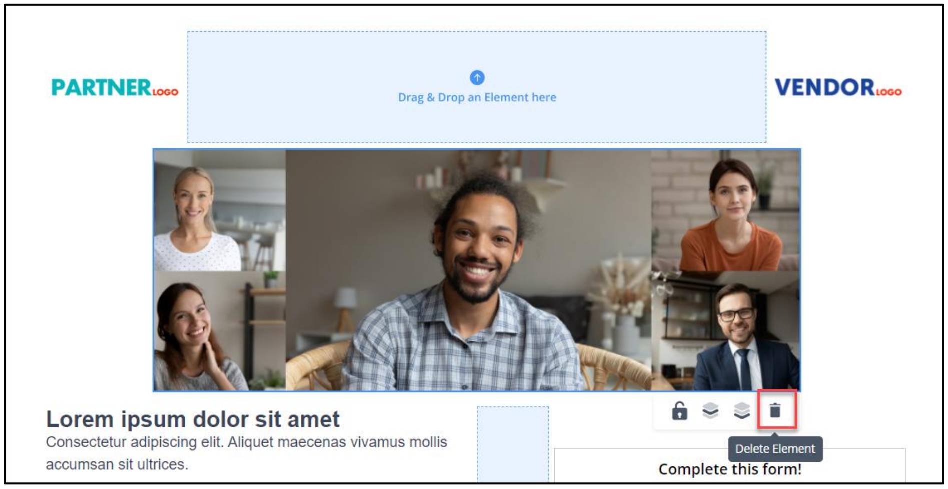
3 Click on the **Select Parent Section** icon. The Section Properties panel opens.



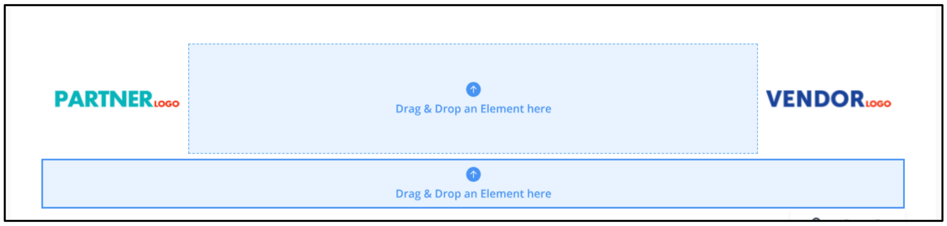
4 If there are multiple sections in your banner, from the **Properties Panel**, in **Customized Columns**, click on the **column**, then click the **delete** icon. (Note, you should see only one column in the section.)



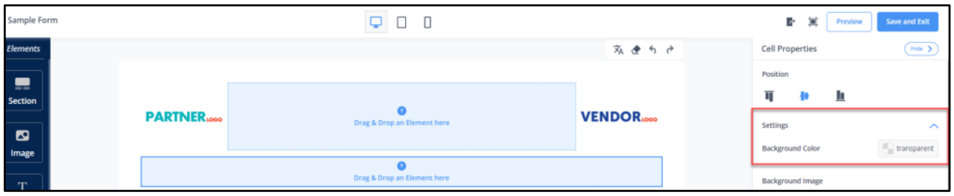
5 Click on an **element** within the section, then click the **Delete Element** icon.



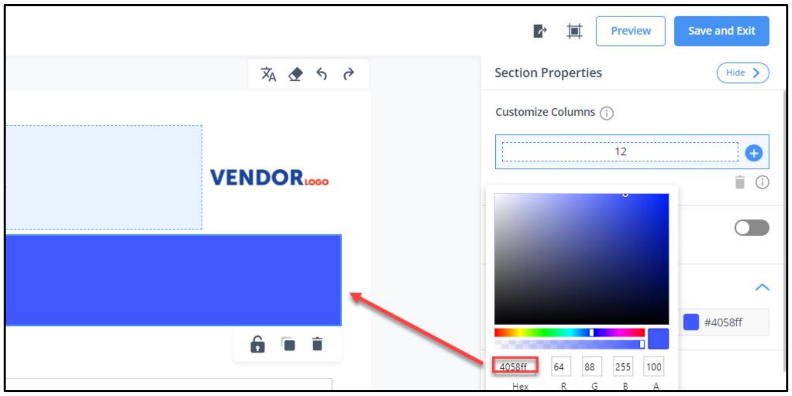
6 Continue to **delete elements** until your section is blank.



7 Click inside the **blank cell**, then from **Cell Properties**, click **Settings > Background Color.**



8 In the **HEX** field, enter **#4058FF.**



9 Drag & Drop the **Text** element onto the **Banner** section.

10 In the **Text** element, click to **highlight the filler text**. Then copy and paste:

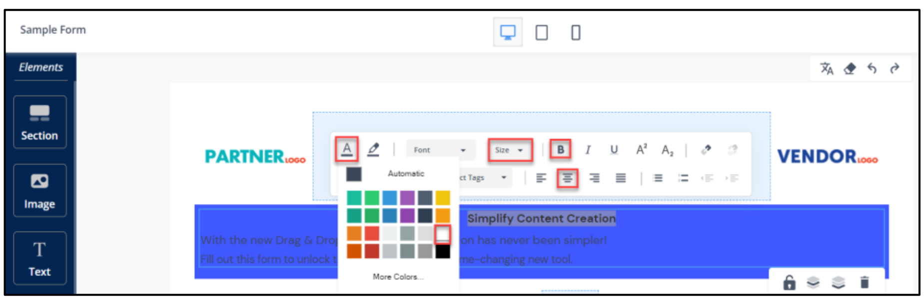
Simplify Content Creation

With the new Drag & Drop Editor, content creation has never been simpler!

Fill out this form to unlock the capabilities of this game-changing new tool.

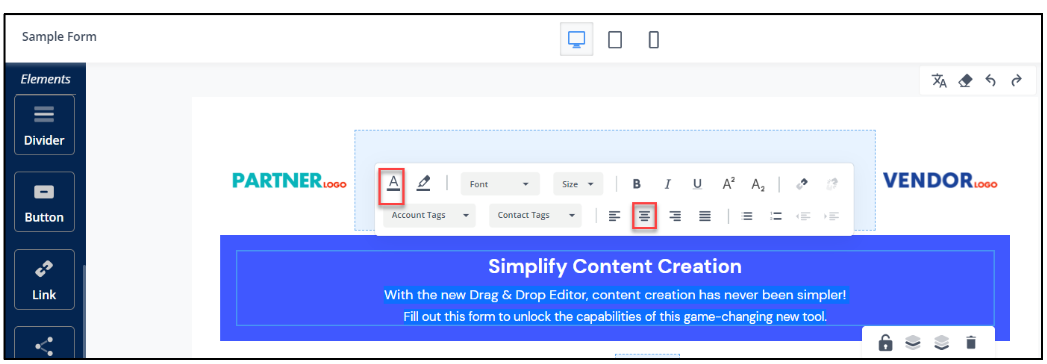
11 Highlight the **heading** content. Then use the toolbar to:

- **Bold**
- **Center**
- **Change the Font size 24**
- **Change font color to white**



12 Highlight the **description** content. Then use the toolbar to:

- **Center**
- **Change Font Color to white**



13 From the **Text Properties** panel, click **Spacing**. Then **move the slider** to increase inner spacing.

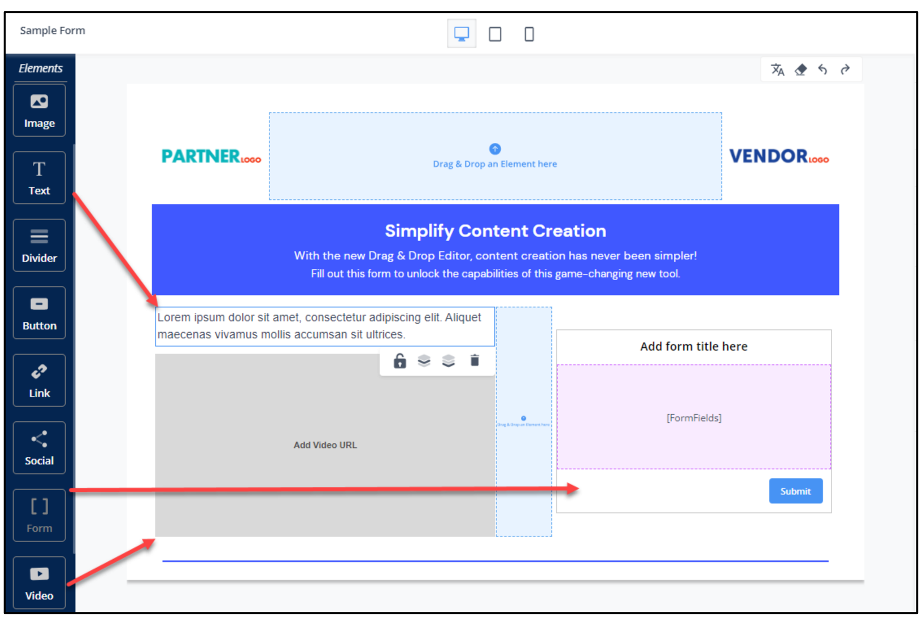
EDIT BODY CONTENT

1 From the **Elements** panel, drag & drop the **Section** element onto the panel.

2 From the **Section Properties** panel, in **Customize Columns**, click the **+ icon** twice. Then resize the columns to a **6:1:5** split.

3 In the **left cell**, drag & drop the **Video** and **Text** elements.

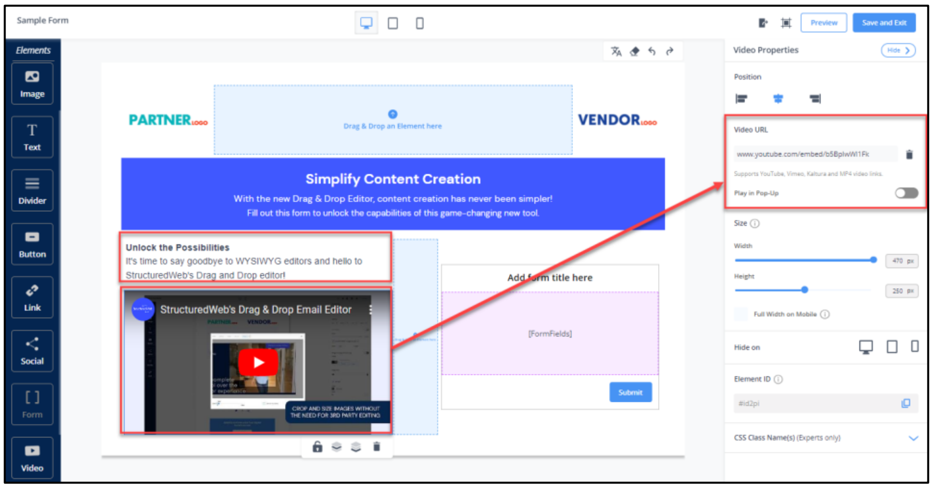
4 In the **right cell**, drag & drop the **Form** element.



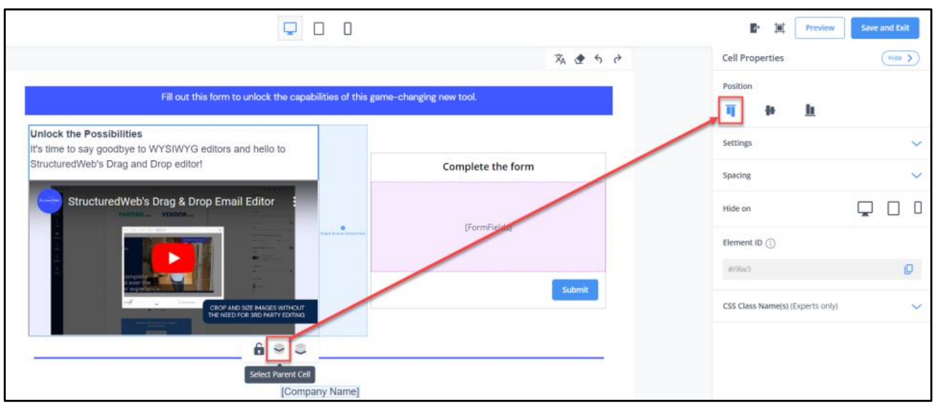
5 In the **Text** element, click to **highlight the filler** text. Then copy and paste:

Unlock the Possibilities
It's time to say goodbye to WYSIWYG editors and hello to StructuredWeb's Drag and Drop editor!

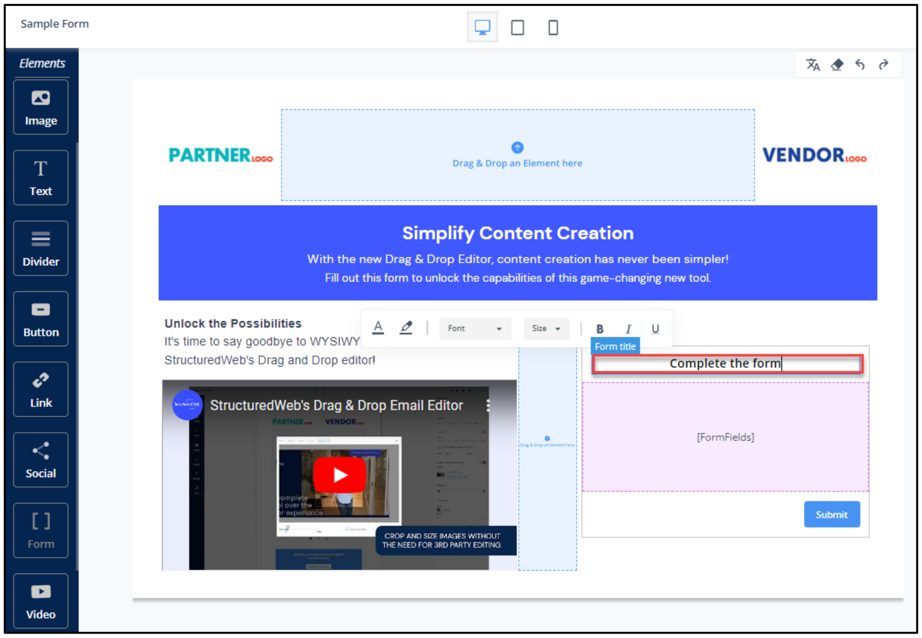
6 In the **Video** element, click to activate. Then in **Video Properties,** In Video URL copy and paste **https://youtu.be/b5BplwWl1Fk**.



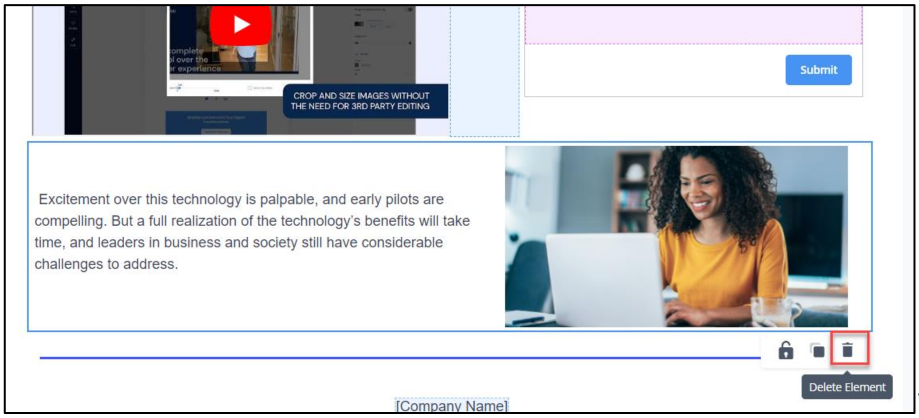
7 Click the **Parent Cell** icon. Then, in **Cell Properties**, in **Position**, click the **Top** icon.



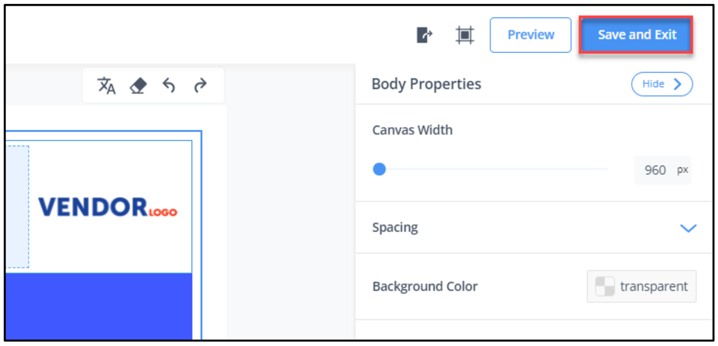
8 In the **Form title** area, click to **activate**. Then type **Complete the form**.



9 Select **unwanted sections** to activate. Then, click the **Delete Element** icon.

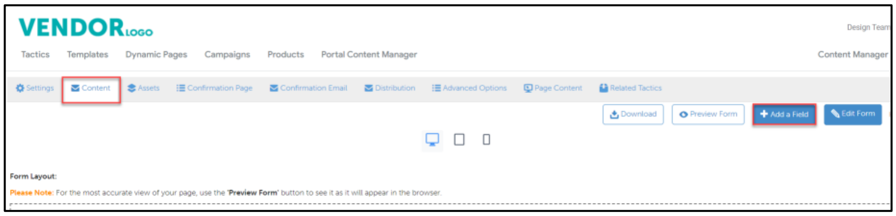


10 Click **Save & Exit**.

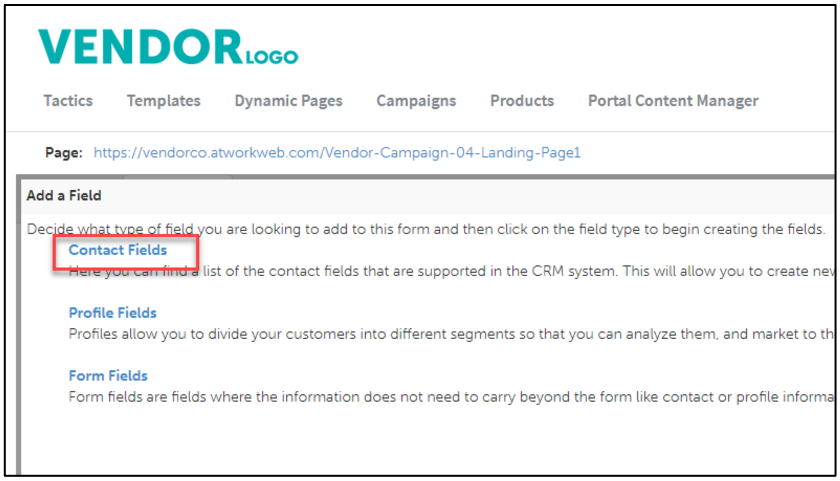


ADD FORM FIELD

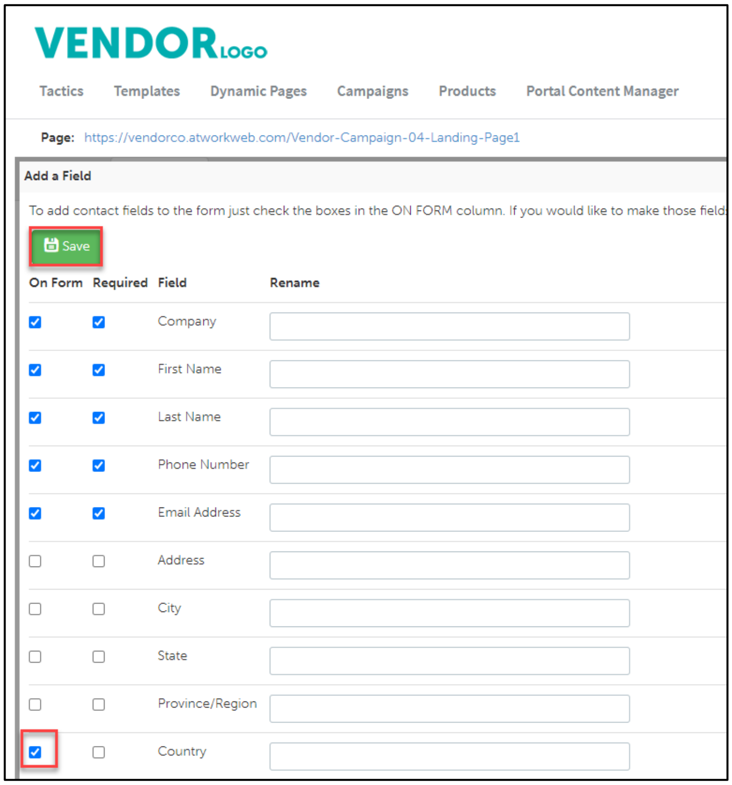
1 From the **Form** toolbar, select **Content > Add a Field.**



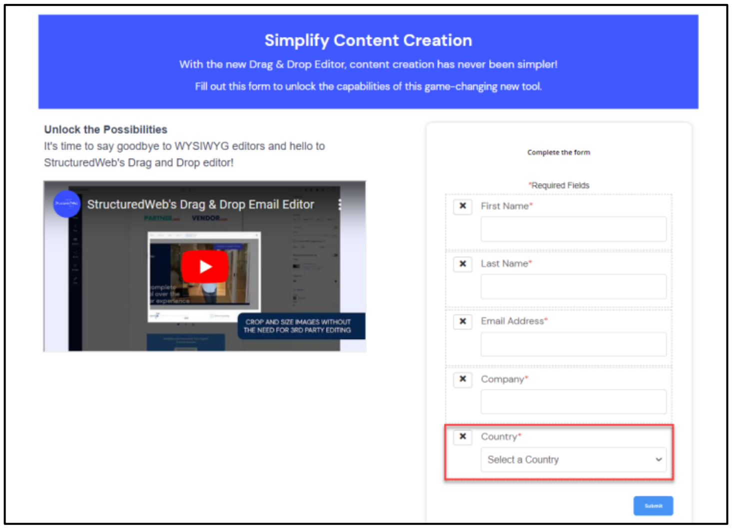
2 From the **Add a Field** box, select the **Contact field.**



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



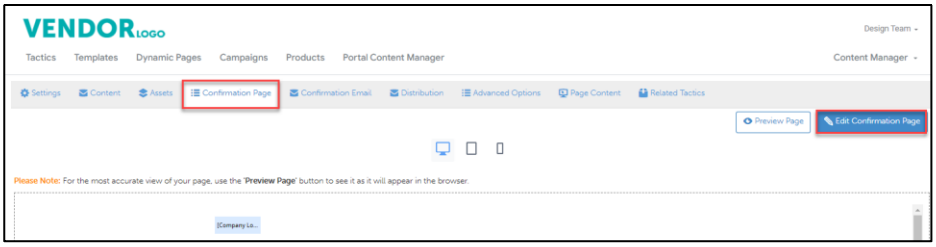
4 Click **Save**. Your new form field will be added to the form page, automatically.



EDIT CONFIRMATION PAGE BANNER

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

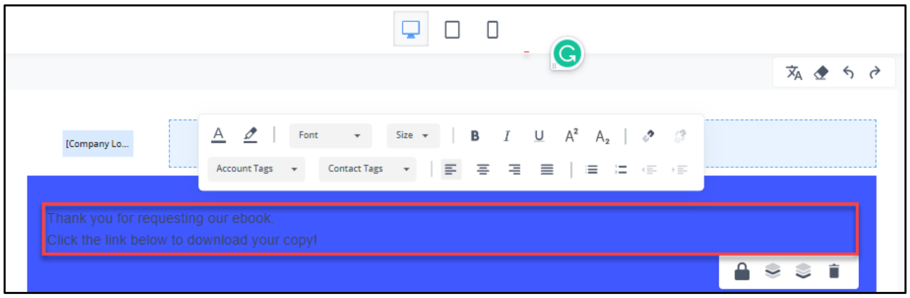
2 Click **Edit Confirmation Page.** The Drag & Drop Editor opens.



3 Repeat steps [2 through 10 in the Edit Banner Content]() section to clear you banner. (**Note:** your confirmation page header should maintain the same look and feel as your landing page header to establish brand continuity.)

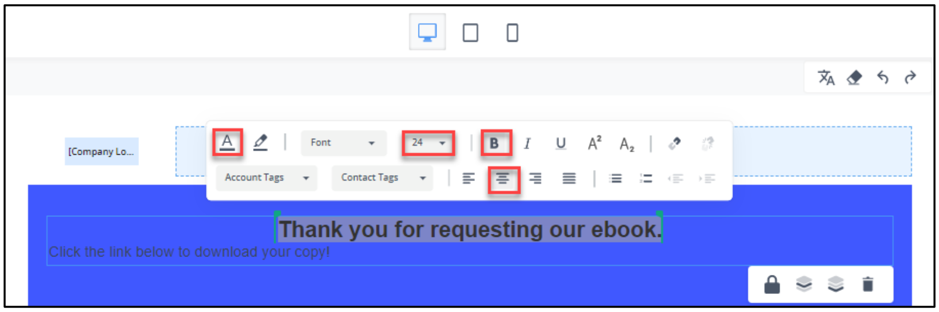
4 In the **Text** box, copy and paste:

Thank you for requesting our ebook.
Click the link below to download your copy!



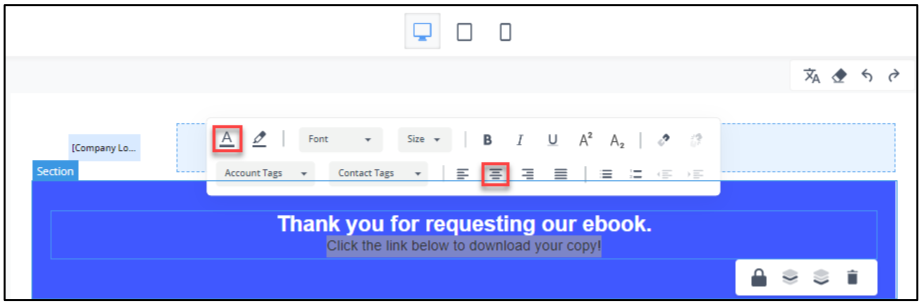
5 Highlight the Heading content. Then use the tool bar to:

- **Bold**
- **Center**
- **Change Font size 24**
- **Change Font Color to white**

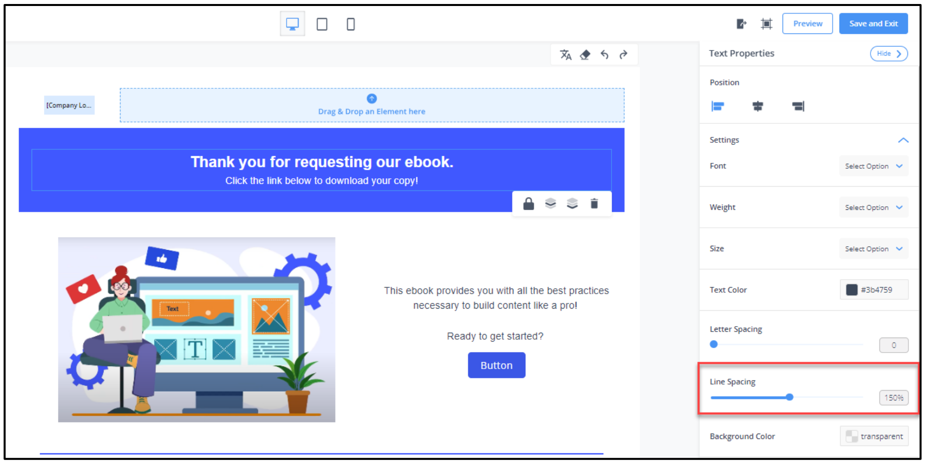


6 Highlight the description content. Then use the toolbar to:

- **Center**
- **Change font color to white**



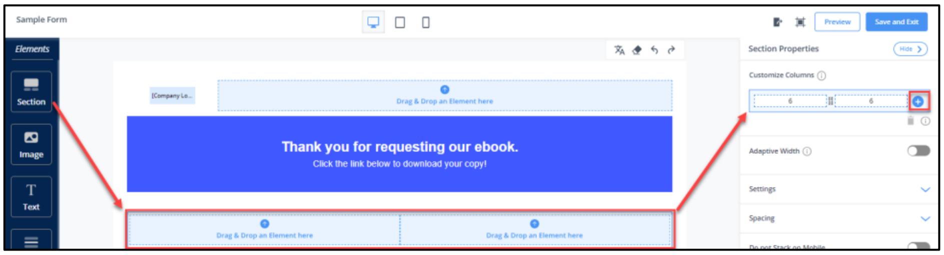
7 From the **Text Properties** panel, click **Settings**. Then, **move the slider** to increase **line space to 150%.**



EDIT CONFIRMATION PAGE BODY

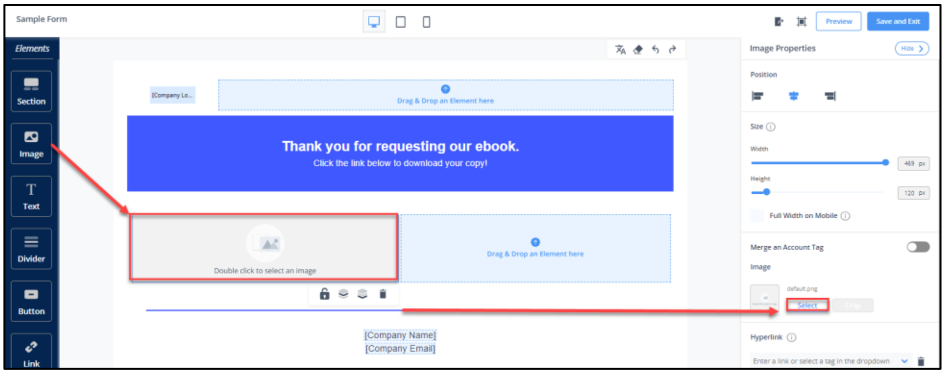
1 From the **Elements** panel, drag & drop the **Section** element onto the canvas**.**

2 From the **Section Properties** panel, in **Customize Columns**, click the **plus** icon Once. Then resize the columns to a **6:6 split**.

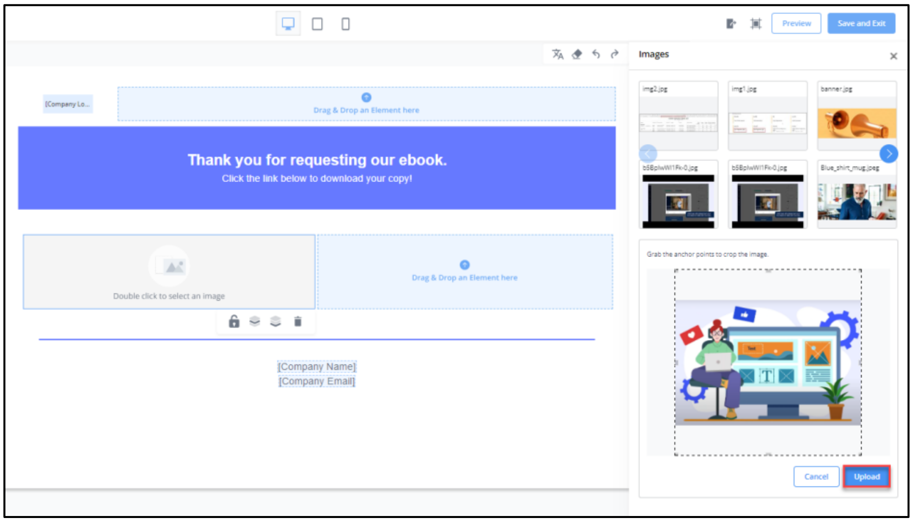


3 In the **left** cell, drag & drop an **Image** element

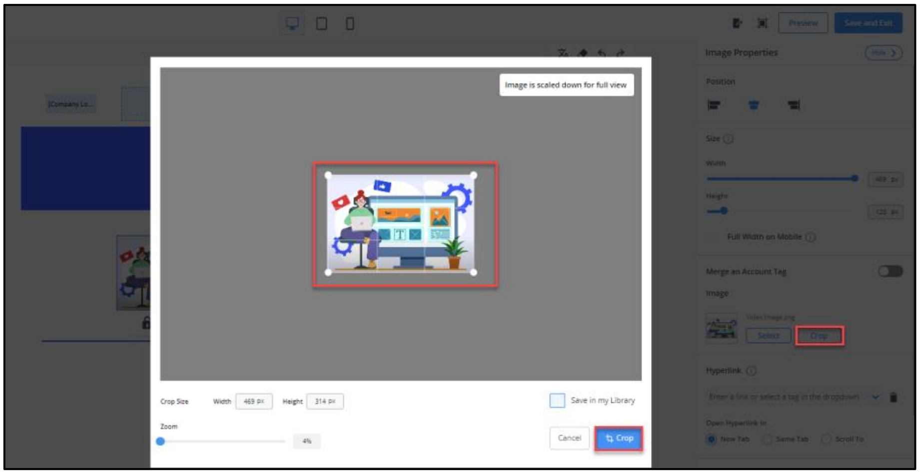
4 From the **Image Properties** panel, in **Image**, click **Select**.



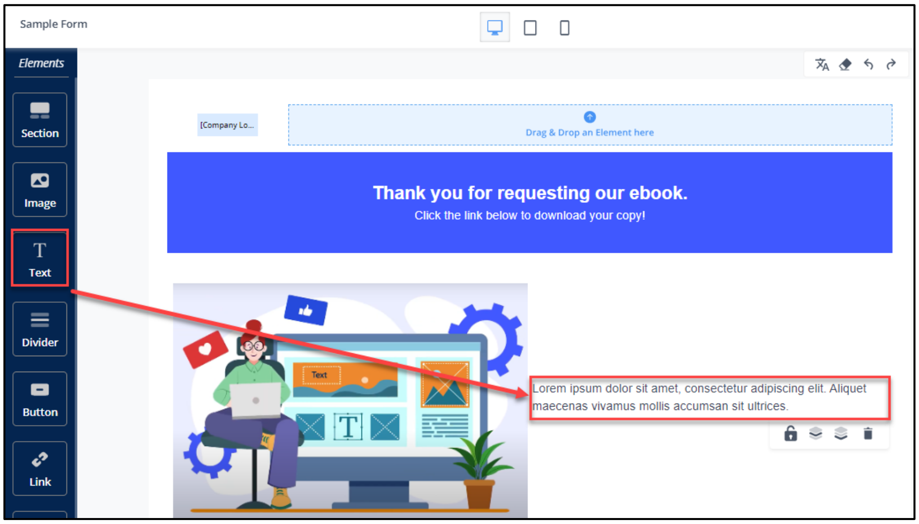
5 Navigate to where the **Videoimage.png** image is stored. Click **Upload**.



6 On the canvas, click inside the **image**. Then, click the **Crop** button to **resize the image.**



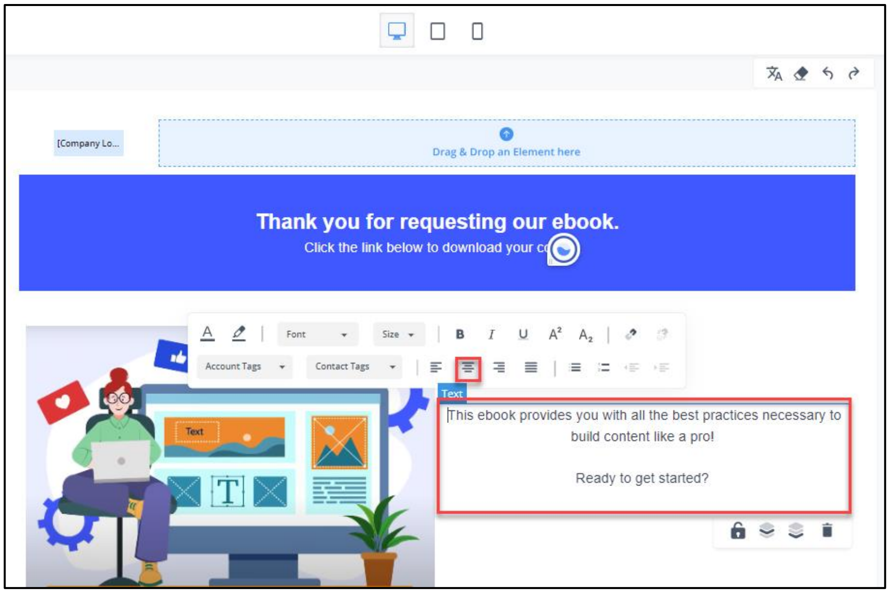
7 In the **right** cell, drag & drop the **Text** element.



8 In the Text element, click to highlight the filler text. Then copy and paste:

This ebook provides you with all the best practices necessary to build content like a pro! Ready to get started?

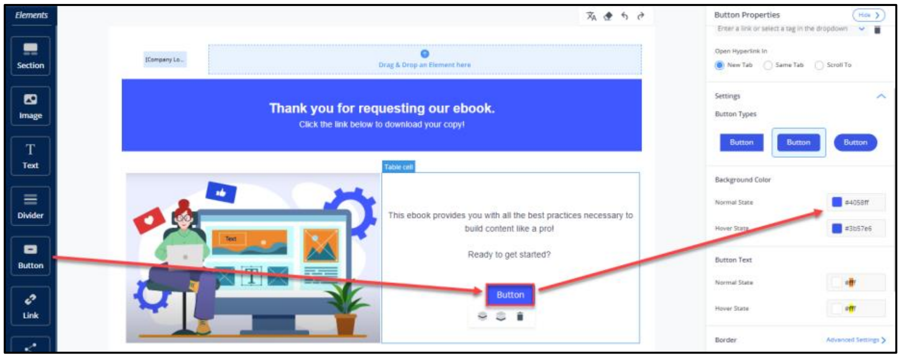
9 Highlight the **headline** content. Then use the toolbar to **center**.



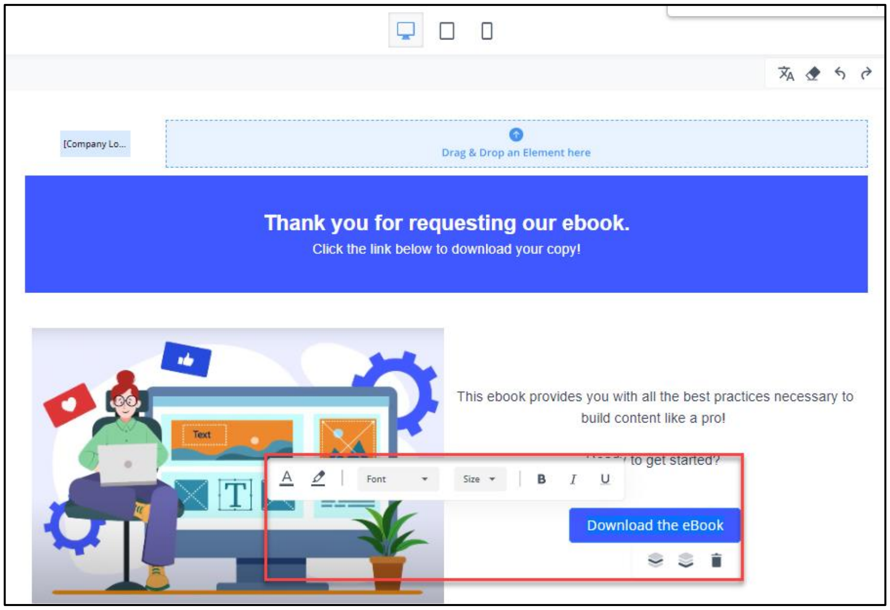
10 From the **Elements** panel, in the **right** cell, drag & drop the **Button** element. Then click to **activate**.

11 From the **Button Properties** panel, click **Settings > Background color > Normal State**.

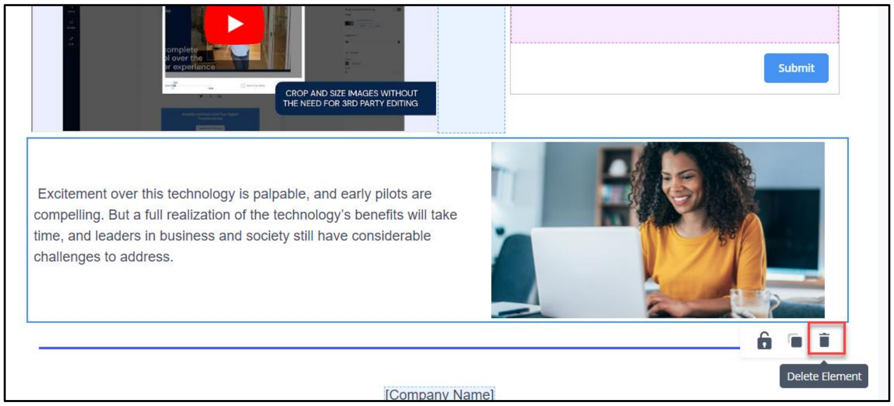
12 In the **HEX** field, enter **#4058FF**.



13 On the **canvas**, click on the **button**. Then type: **Download the eBook**.



14 Select **unwanted sections** to activate. Then click the **Delete Element** icon.



15 Click **Save & Exit.**

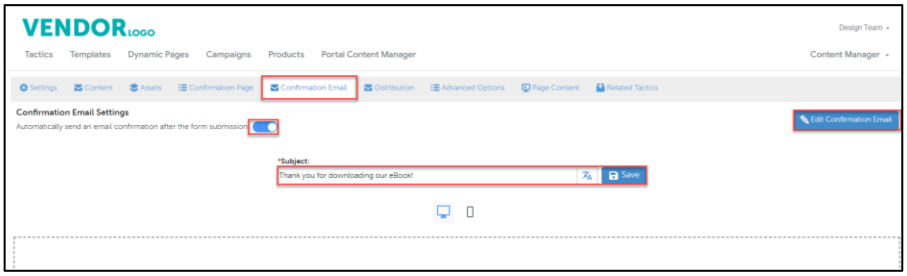
CREATE CONFIRMATION EMAIL

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

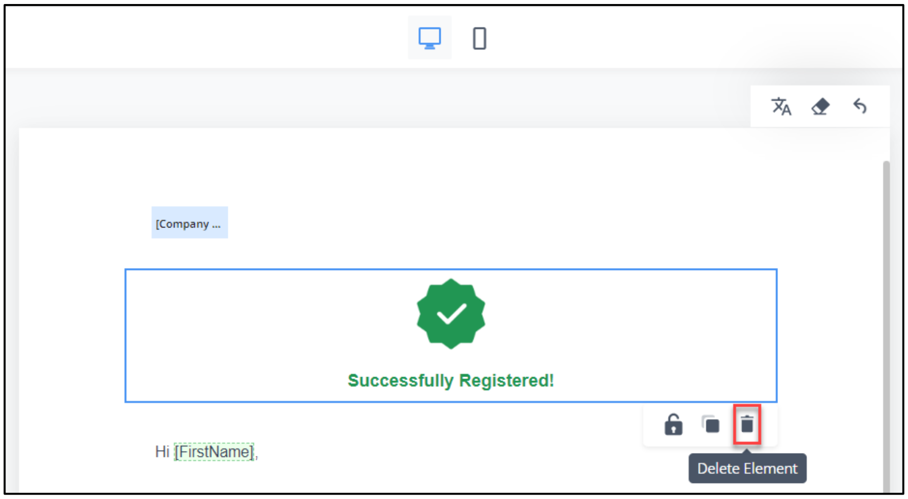
2 In **Confirmation Email Settings,** click the switch to activate.

3 In the **Subject** text box, type **Thank you for downloading our ebook!** Then click **Save**.

4 Click **Edit Confirmation Email**.



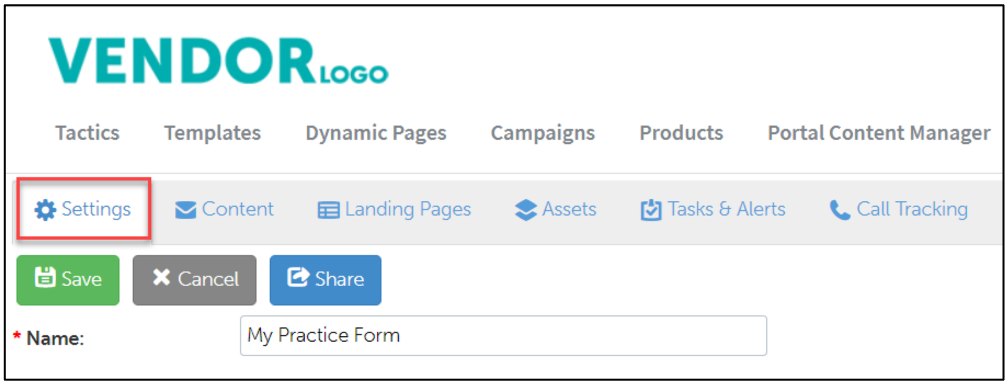
5 In the **Banner**, click to **activate** the section. Then, click the **Delete Element** icon.



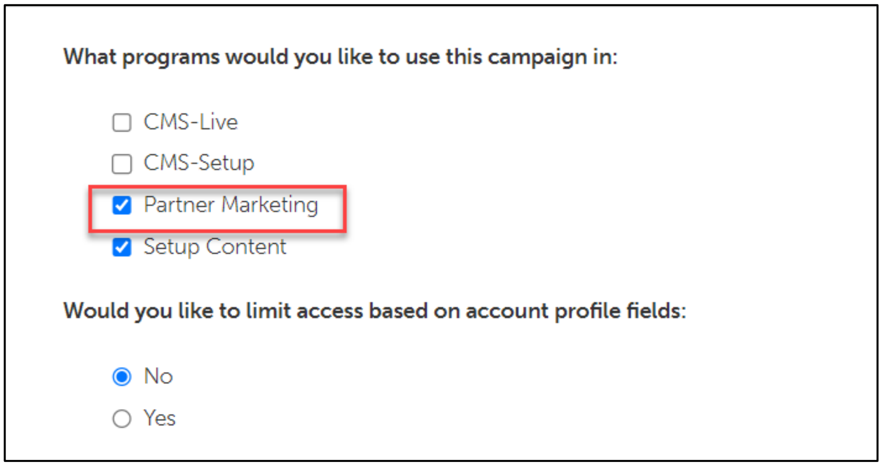
3 Click **Save & Exit**.

ACTIVATE PAGE

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**.