



# 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:

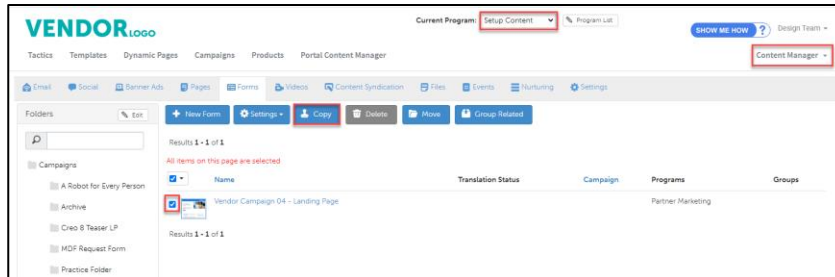
- [Copy a form](#)
- [Create form settings](#)
- [Edit banner content](#)
- [Edit body content](#)
- [Add a form field](#)
- [Edit a confirmation page banner](#)
- [Edit a confirmation page body](#)
- [Create a confirmation email](#)
- [Publish Form](#) (This step is for **reference only**. Do not publish practice content created during this onboarding program.)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



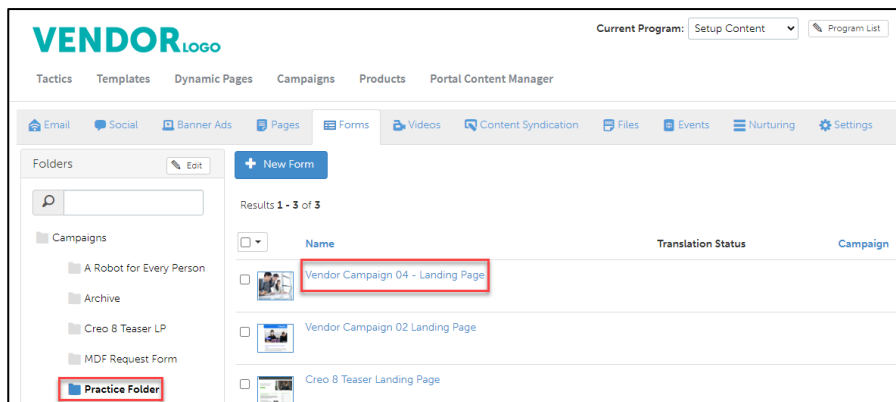
- 4 From the **folder** drop-down menu, select a **folder** to copy your form.

The screenshot shows the 'Copy and assign tactics' dialog box. It prompts the user to '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.' The 'Assigned To' dropdown is set to 'Team, Design' and the 'Folder' dropdown is set to '- Practice Folder'. A 'Save' button is visible at the bottom left.

- 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 displays the 'Settings' configuration page for a 'Vendor Logo'. The interface includes a top navigation bar with tabs for 'Tactics', 'Templates', 'Dynamic Pages', 'Campaigns', 'Products', and 'Portal Content Manager'. Below this is a secondary navigation bar with icons for 'Settings', 'Content', 'Assets', 'Confirmation Page', 'Confirmation Email', 'Distribution', 'Advanced Options', and 'Page Content'. The 'Settings' tab is active and highlighted with a red box. Below the navigation bars are three buttons: 'Save', 'Cancel', and 'Share'. The main form area contains the following fields:

- Name:** A text input field containing 'My Practice Form', highlighted with a red box. Below it, the text 'Original Template: Landing Page Template' is visible.
- Description:** A text area containing 'This is my practice form', highlighted with a red box.
- Assigned To:** A dropdown menu currently set to 'Team, Design'.
- Campaign Tracking Variables:** A section with three fields: 'Campaign:' (none), 'Source:' (Bing), and 'Creative:' (none).
- Thumbnail image:** A 'Choose File' button followed by the text 'No file chosen' and '(File must be in the following formats: jpg, gif, png and 200 x 150 pixels)'. The 'Choose File' button is highlighted with a red box.
- Custom Thumbnail:** A checkbox labeled 'Allow system to overwrite your thumbnail with a generated version.' which is checked and highlighted with a red box.

- 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

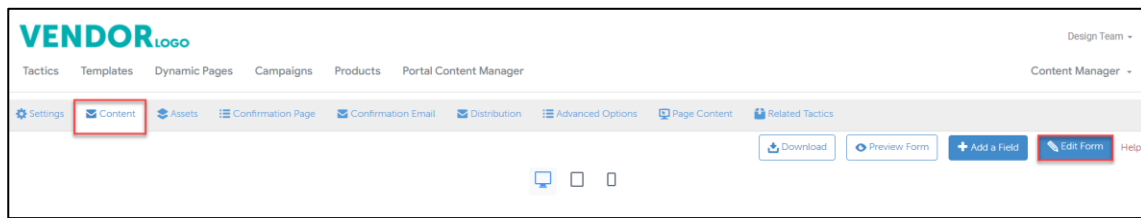
**\* Marketing Focus**

All  
 Prospects  
 Existing Customers  
 Enterprise  
 SMB

- 12 Click **Save**.

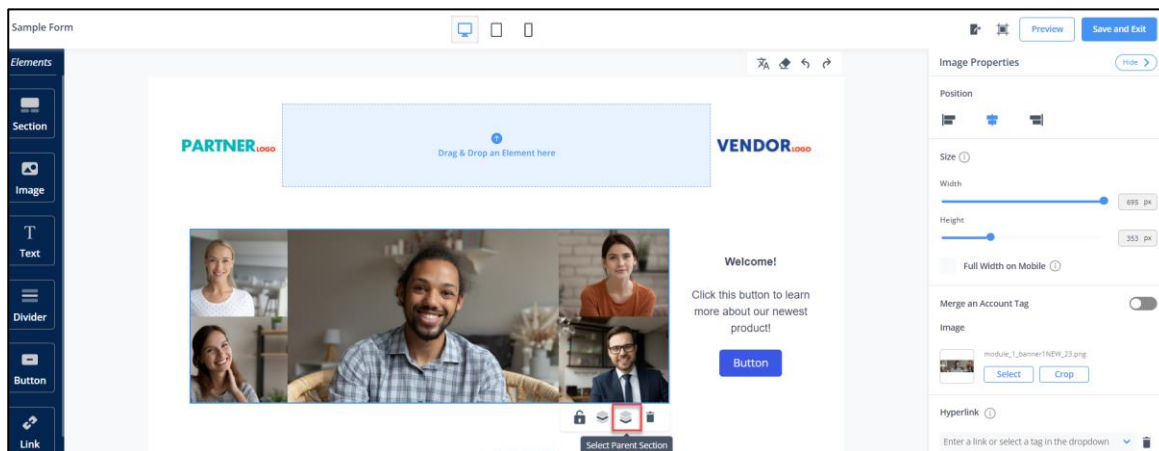
## EDIT BANNER CONTENT

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

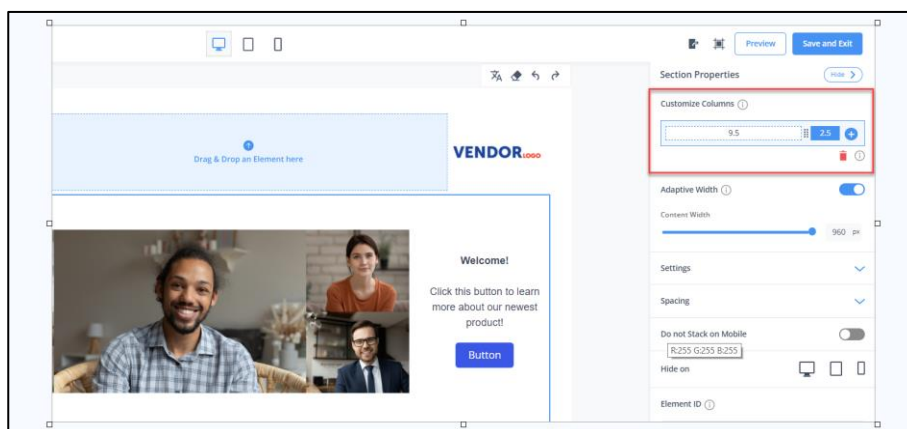


- 2 On the canvas, click **inside the header**. Icons appear at the bottom of the section.

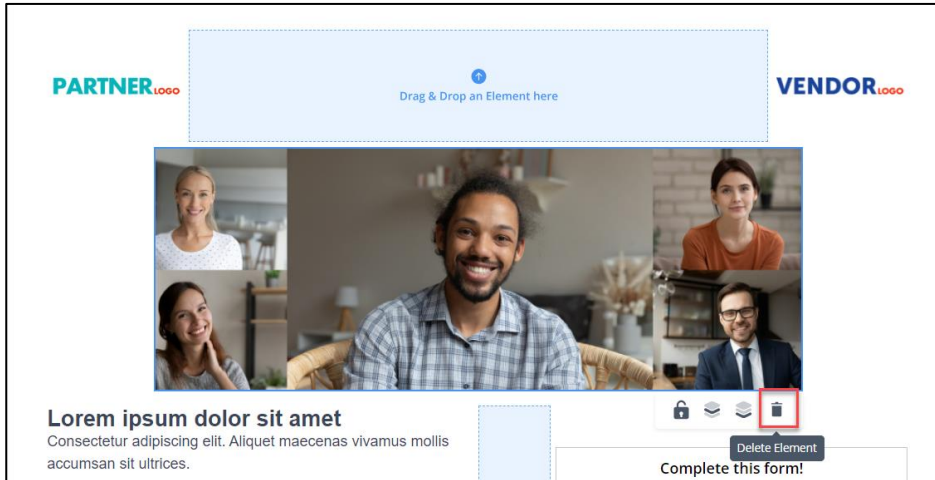
- 3 Click on the **Select Parent Section** icon. The Section Properties panel opens.



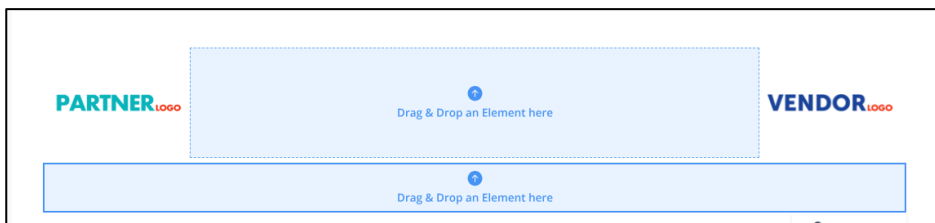
- 4 If there are multiple sections in your banner, from the **Properties Panel**, in **Customized Columns**, click on the **column**, then click the **delete** icon. (Note, you should see only one column in the section.)



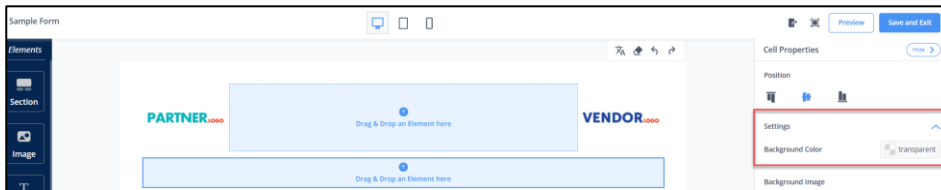
5 Click on an **element** within the section, then click the **Delete Element** icon.



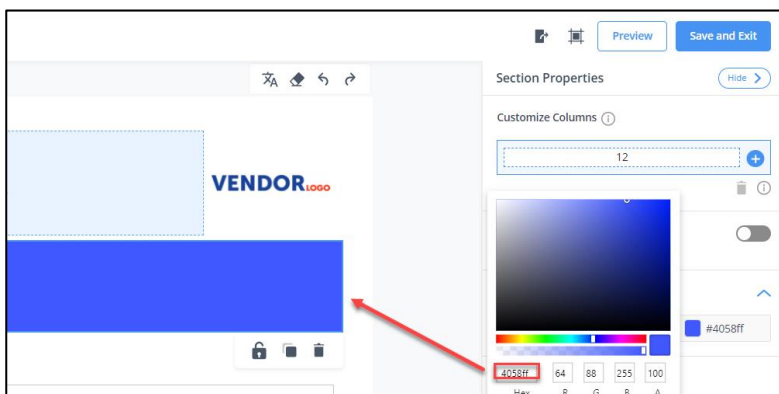
6 Continue to **delete elements** until your section is blank.



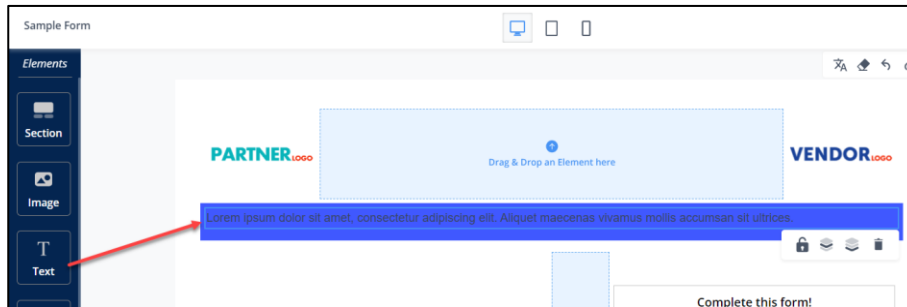
7 Click inside the **blank cell**, then from **Cell Properties**, click **Settings** > **Background Color**.



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:

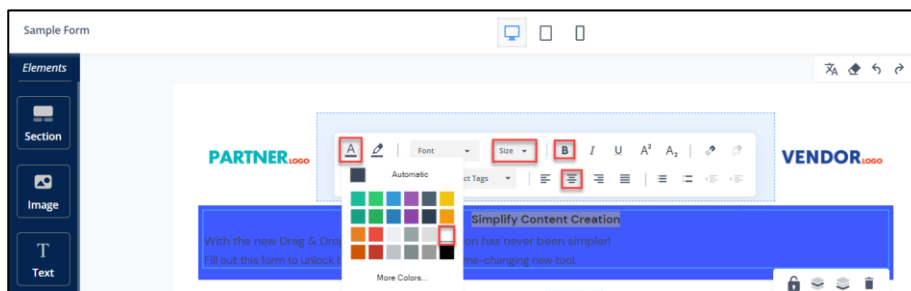
### Simplify Content Creation

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.

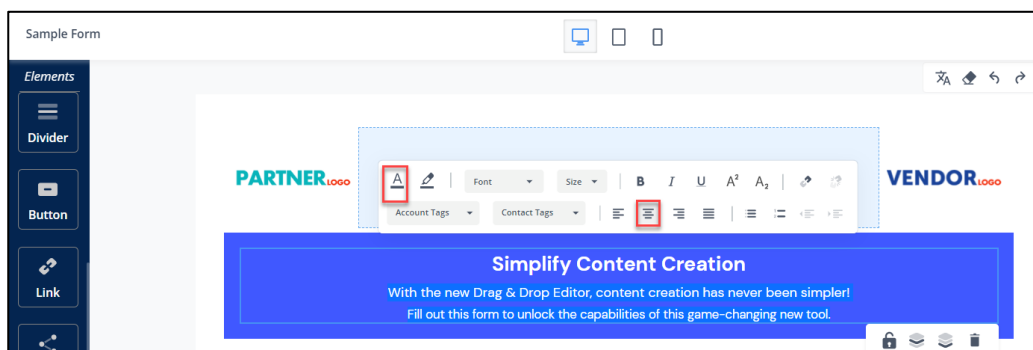
- 11 Highlight the **heading** content. Then use the toolbar to:

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

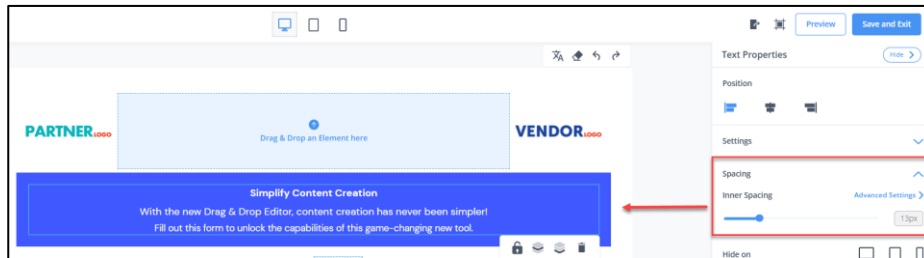


- 12 Highlight the **description** content. Then use the toolbar to:

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

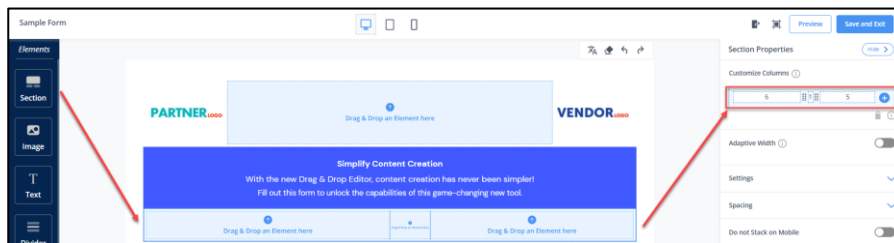


- From the **Text Properties** panel, click **Spacing**. Then **move the slider** to increase inner spacing.

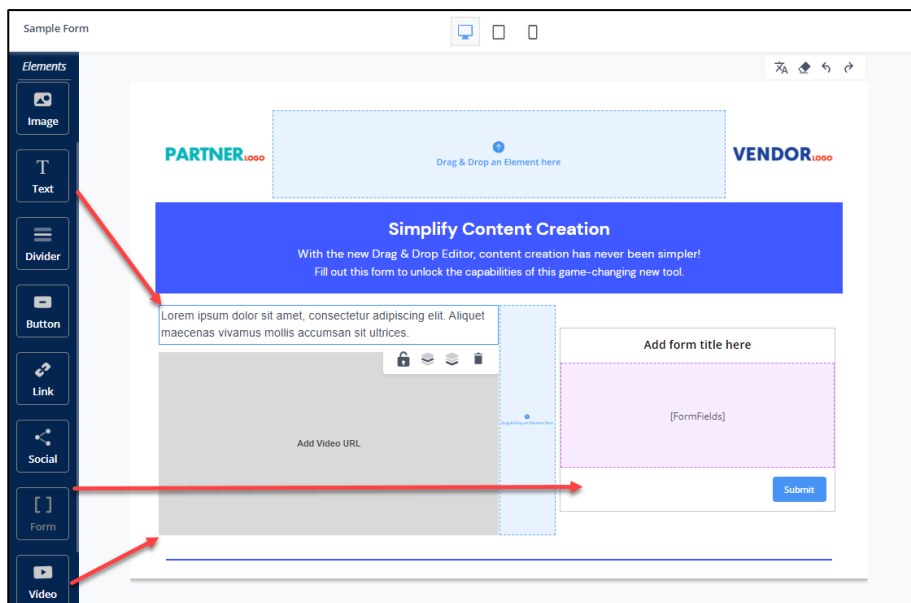


## EDIT BODY CONTENT

- From the **Elements** panel, drag & drop the **Section** element onto the panel.
- From the **Section Properties** panel, in **Customize Columns**, click the **+** icon twice. Then resize the columns to a **6:1:5** split.



- In the **left cell**, drag & drop the **Video** and **Text** elements.
- In the **right cell**, drag & drop the **Form** element.



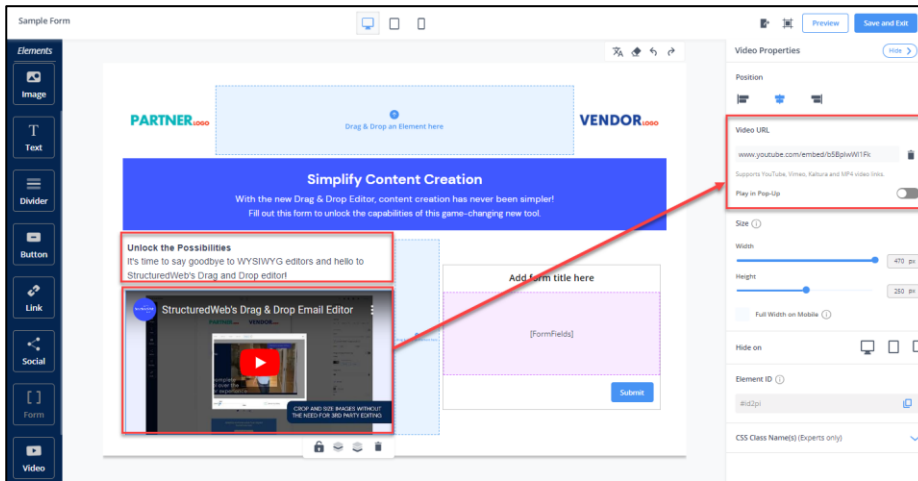


5 In the **Text** element, click to **highlight the filler** text. Then copy and paste:

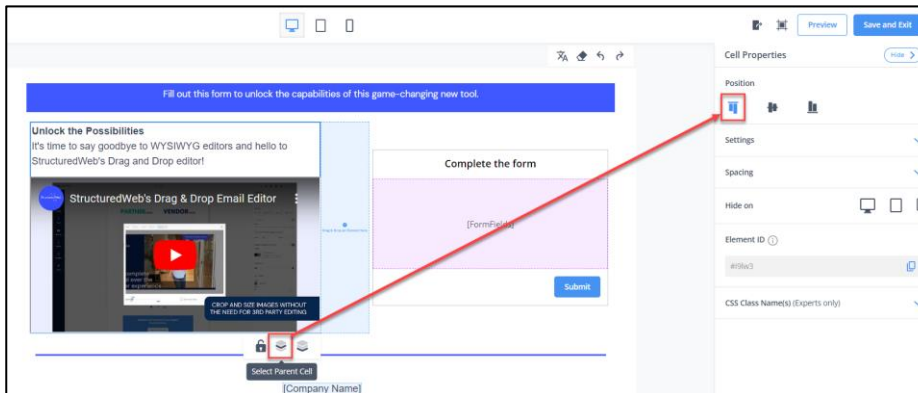
**Unlock the Possibilities**

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

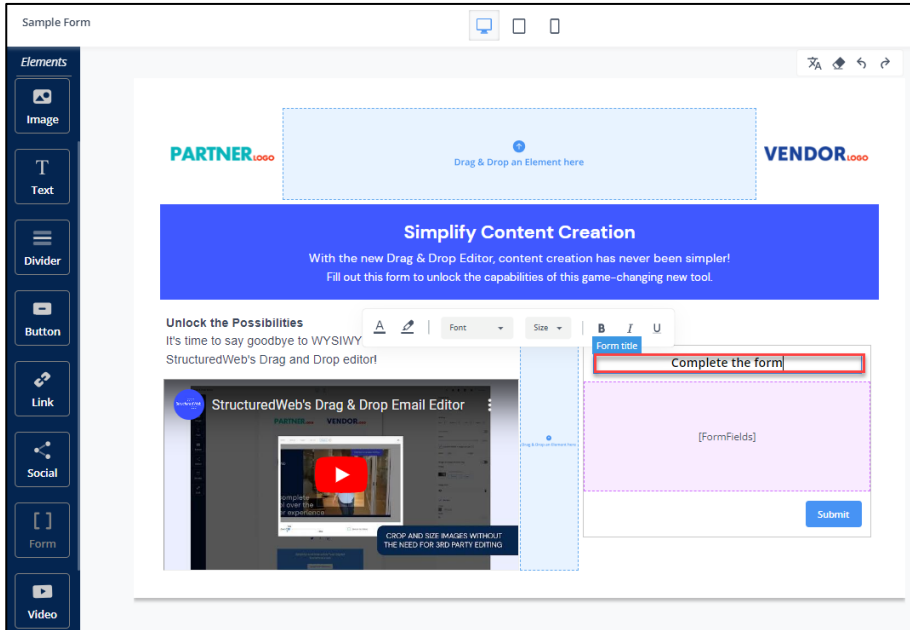
6 In the **Video** element, click to activate. Then in **Video Properties**, In Video URL copy and paste <https://youtu.be/b5BplwW1fK>.



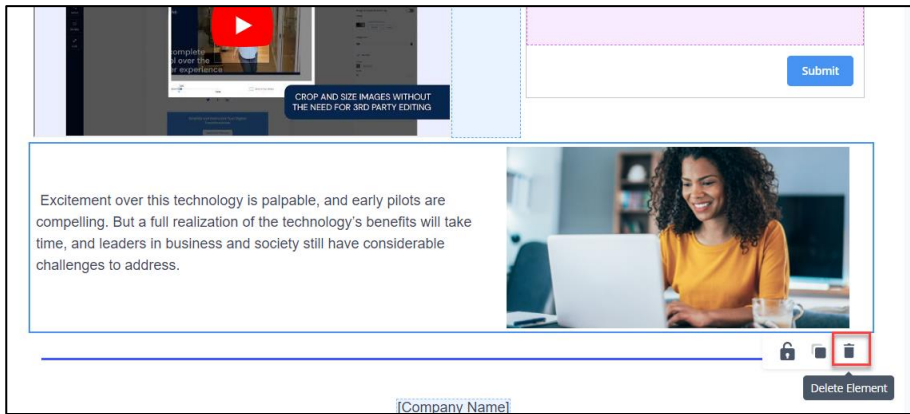
7 Click the **Parent Cell** icon. Then, in **Cell Properties**, in **Position**, click the **Top** icon.



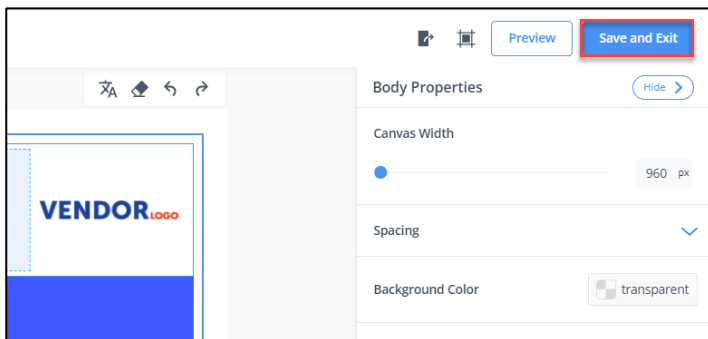
8 In the **Form title** area, click to **activate**. Then type **Complete the form**.



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

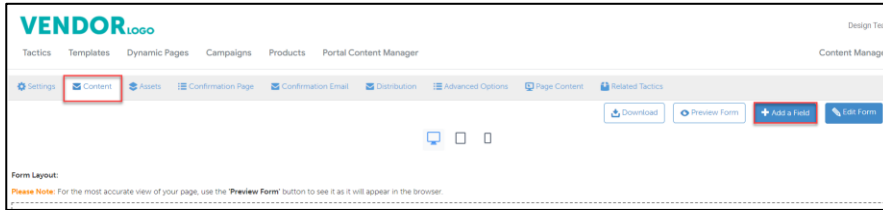


10 Click **Save & Exit**.

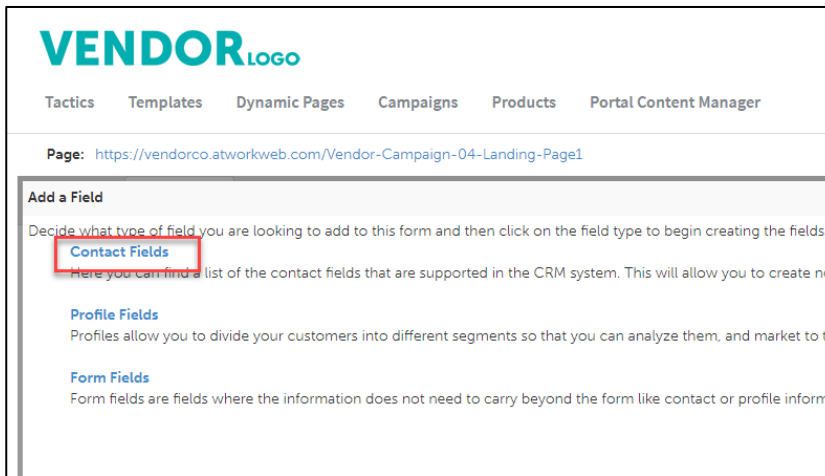


## ADD FORM FIELD

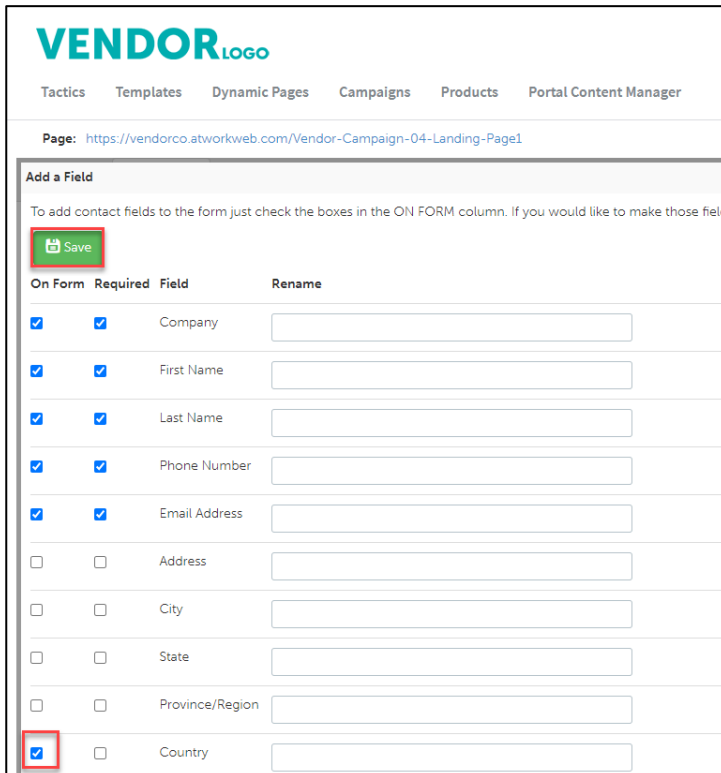
- From the **Form** toolbar, select **Content > Add a Field**.



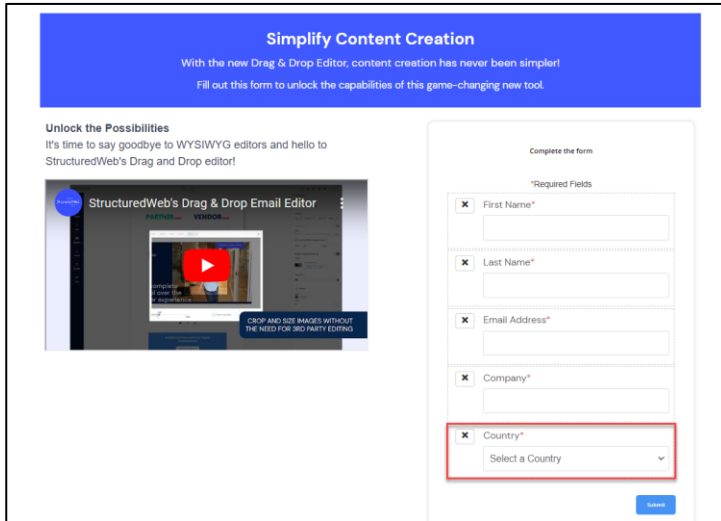
- From the **Add a Field** box, select the **Contact field**.



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

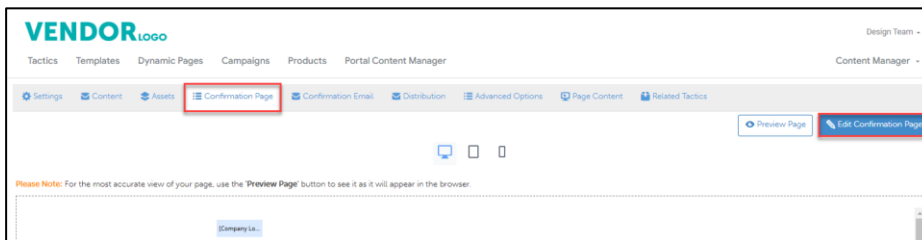


- 4 Click **Save**. Your new form field will be added to the form page, automatically.



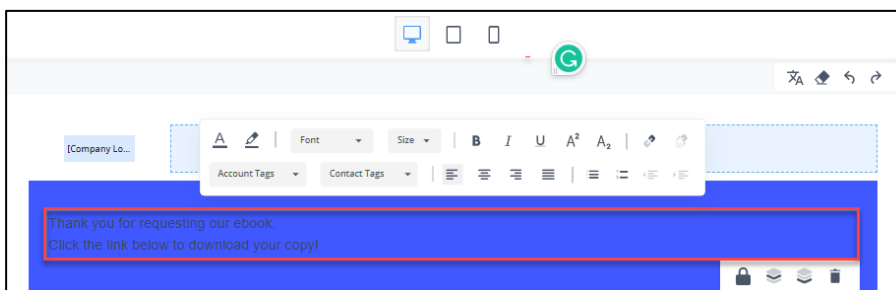
## EDIT CONFIRMATION PAGE BANNER

- 1 From the **Form** toolbar, click **Confirmation Page**.
- 2 Click **Edit Confirmation Page**. The Drag & Drop Editor opens.



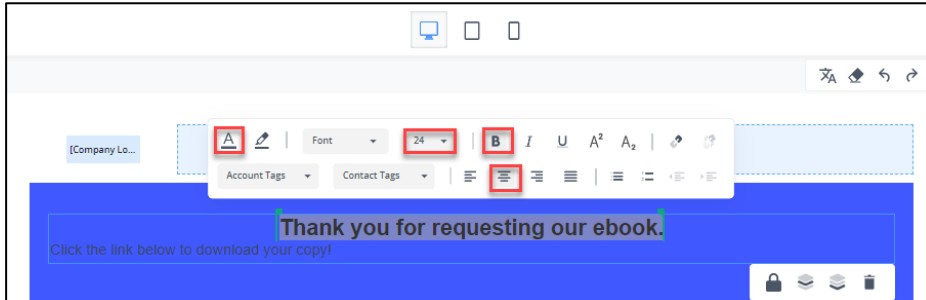
- 3 Repeat steps [2 through 10 in the Edit Banner Content](#) section to clear you banner. (**Note:** your confirmation page header should maintain the same look and feel as your landing page header to establish brand continuity.)
- 4 In the **Text** box, copy and paste:

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



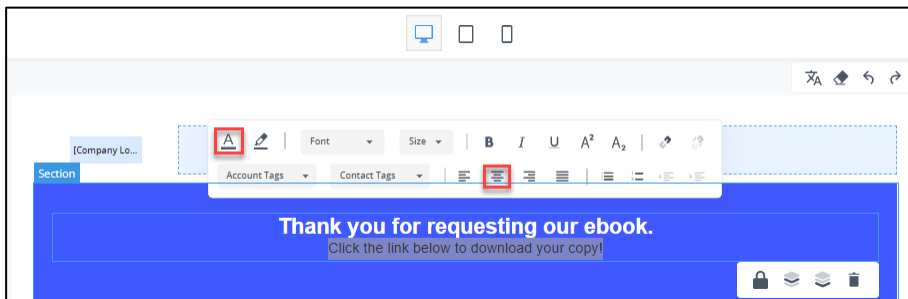
5 Highlight the Heading content. Then use the tool bar to:

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

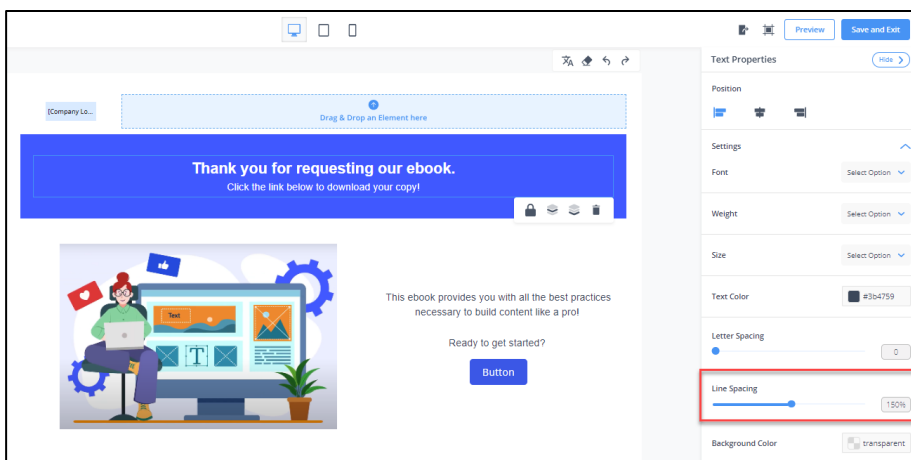


6 Highlight the description content. Then use the toolbar to:

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

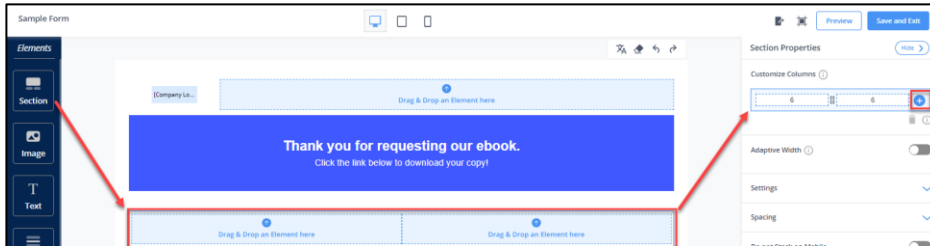


7 From the **Text Properties** panel, click **Settings**. Then, **move the slider** to increase line space to **150%**.

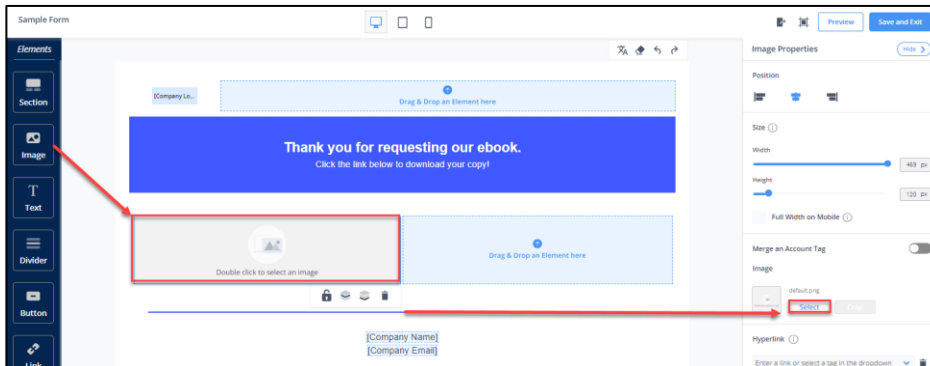


## EDIT CONFIRMATION PAGE BODY

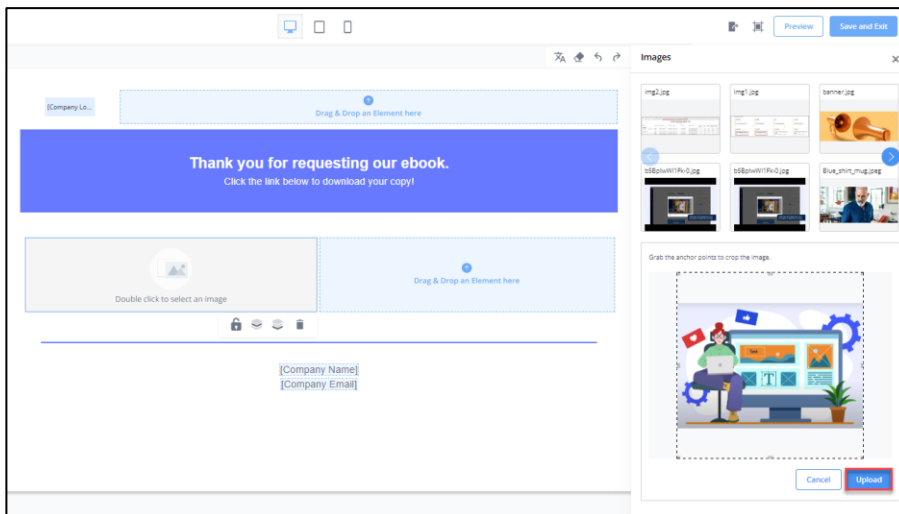
- 1 From the **Elements** panel, drag & drop the **Section** element onto the canvas.
- 2 From the **Section Properties** panel, in **Customize Columns**, click the **plus** icon Once. Then resize the columns to a **6:6 split**.



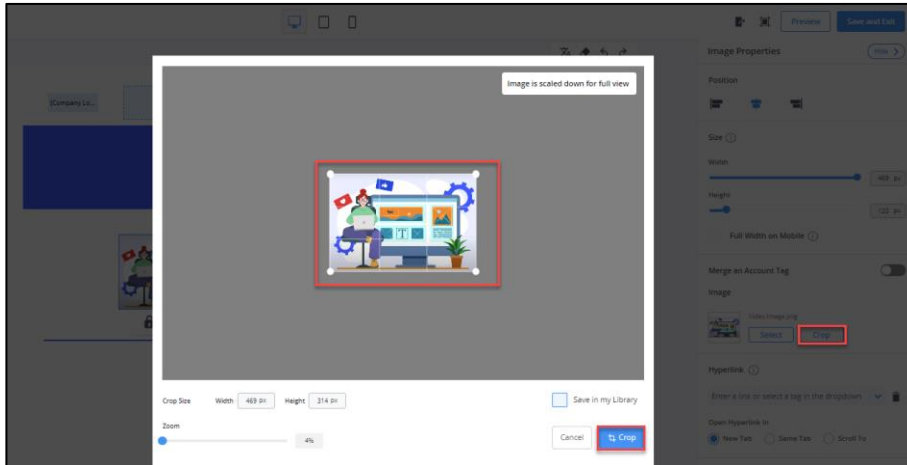
- 3 In the **left** cell, drag & drop an **Image** element
- 4 From the **Image Properties** panel, in **Image**, click **Select**.



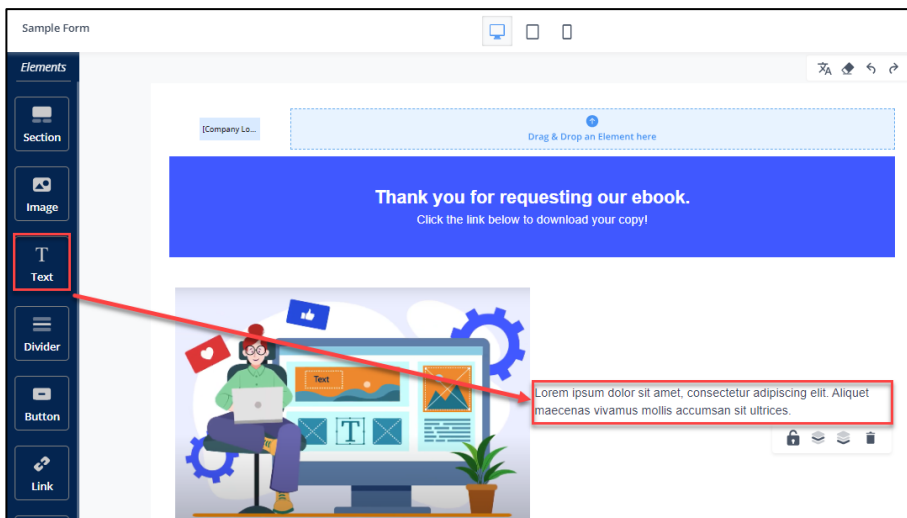
- 5 Navigate to where the **Videimage.png** image is stored. Click **Upload**.



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



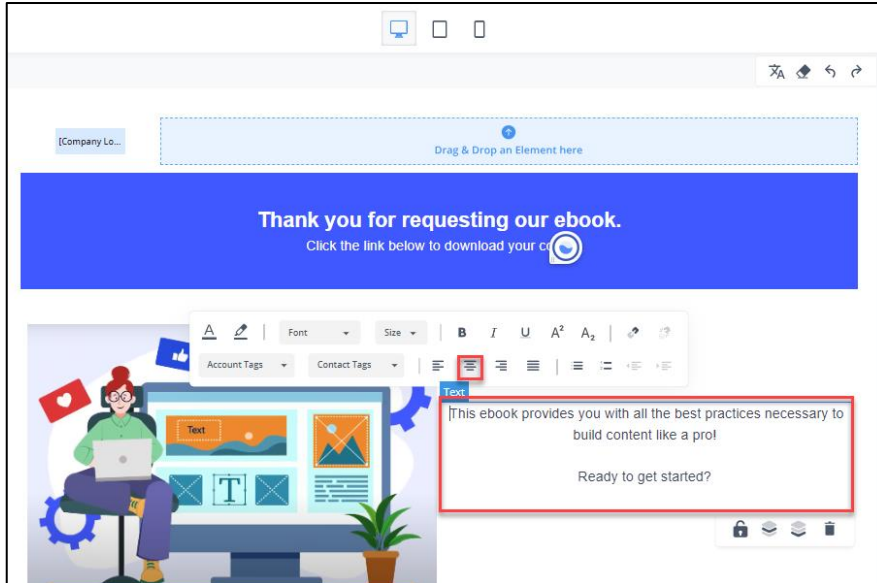
- 7 In the **right** cell, drag & drop the **Text** element.



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?

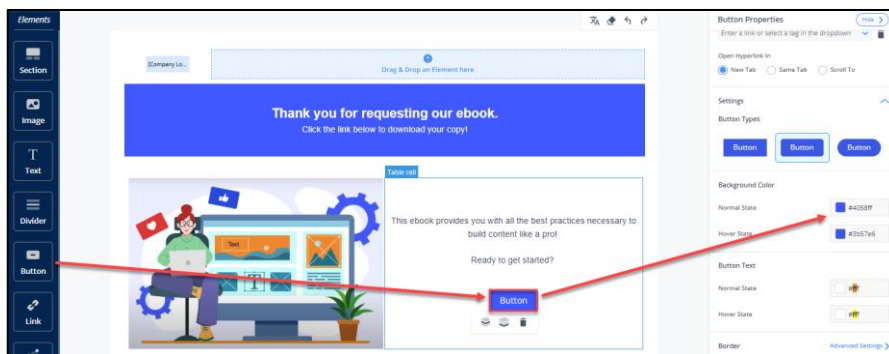
9 Highlight the **headline** content. Then use the toolbar to **center**.



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

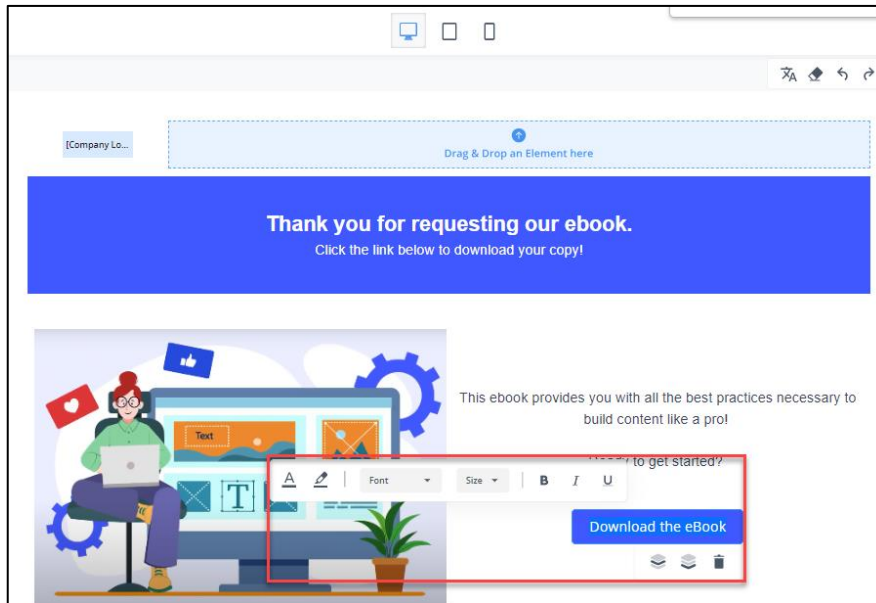
11 From the **Button Properties** panel, click **Settings > Background color > Normal State**.

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

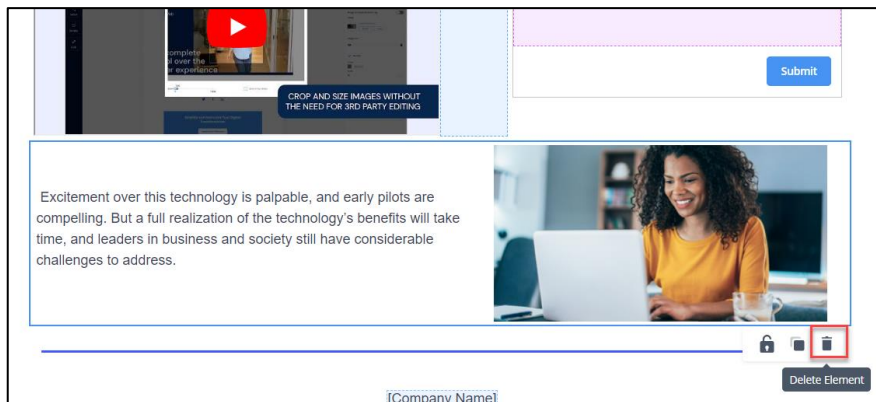




- 13 On the **canvas**, click on the **button**. Then type: **Download the eBook**.



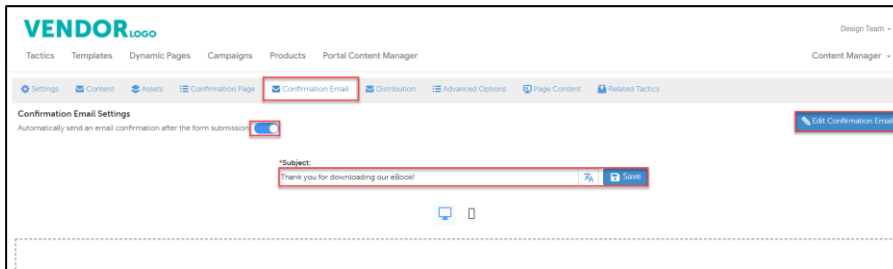
- 14 Select **unwanted sections** to activate. Then click the **Delete Element** icon.



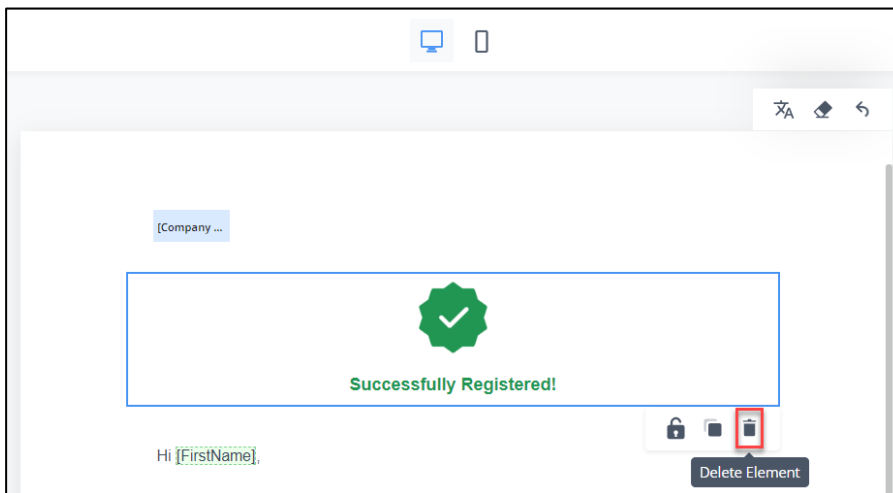
- 15 Click **Save & Exit**.

## 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**.



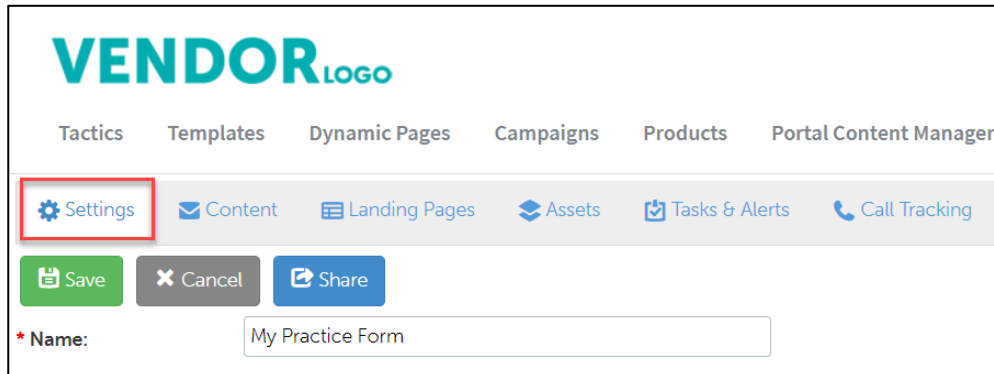
- 5 In the **Banner**, click to **activate** the section. Then, click the **Delete Element** icon.



- 3 Click **Save & Exit**.

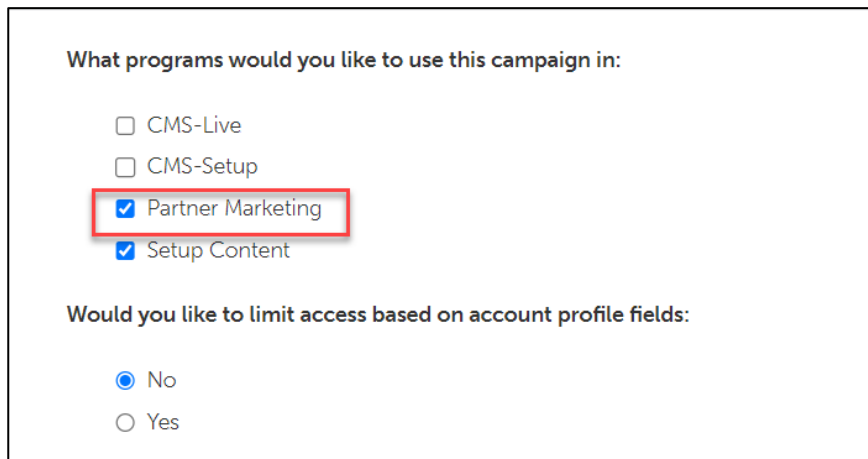
## ACTIVATE PAGE

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



The screenshot shows the Vendor Logo interface. At the top, there is a navigation menu with items: Tactics, Templates, Dynamic Pages, Campaigns, Products, and Portal Content Manager. Below this is a toolbar with icons for Settings (highlighted with a red box), Content, Landing Pages, Assets, Tasks & Alerts, and Call Tracking. Underneath the toolbar are three buttons: Save (green), Cancel (grey), and Share (blue). At the bottom, there is a text input field labeled '\* Name:' containing the text '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. 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**.