

Public forms

This article applies to:

[Pro](#)

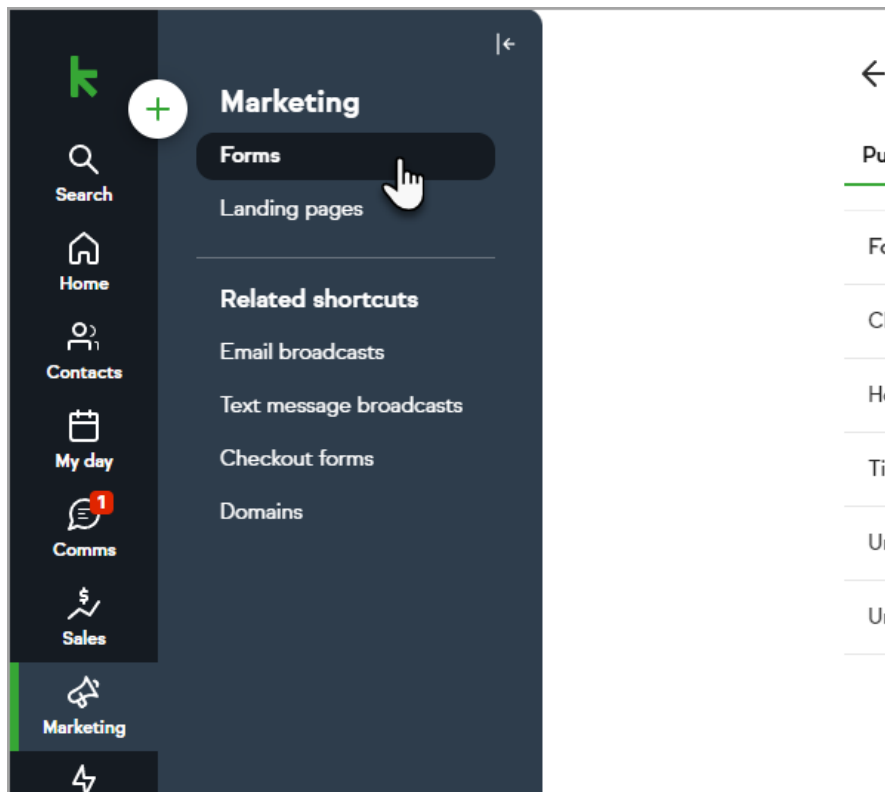
[Max](#)

Easily capture leads with a public form. Create your form in just a couple of minutes, then share it wherever you wish you capture contact information, such as your website, Facebook page, or Instagram account. Leads who provide their email when filling out your form will receive an email confirmation thanking them for reaching out.

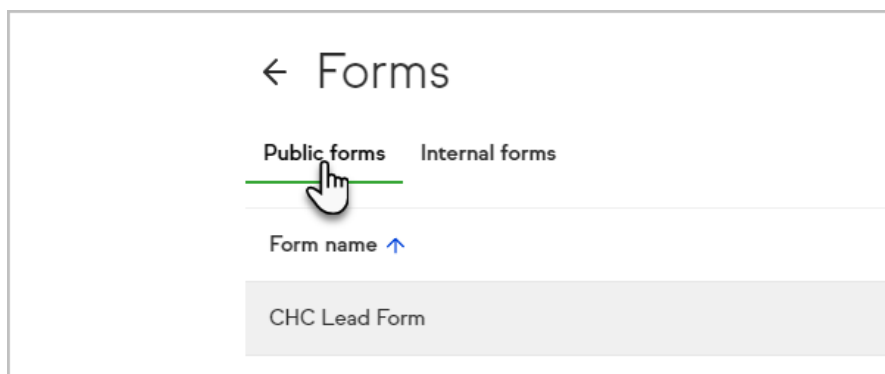
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Access your public forms

1. Go to **Marketing > Forms**

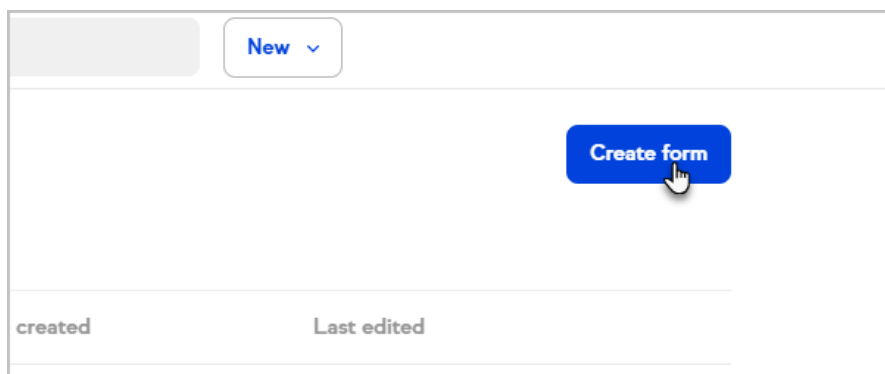


2. Click **Public forms**



Create a public form

1. Navigate to the Forms page
2. Click **Create form**



3. Select **Public**

What type of form do you want to create?

Internal
Filled out by you whenever you add or update contacts in Keap

or

Public
Filled out by your leads wherever they're embedded or published online

4. Select a form template

Select template

Jump start your form with common fields already added.

Template name
Lead form

Contact form

Email sign up

Lead form

5. Click **Start building your form**

Select template

Jump start your form with common fields already added.

Template name
Lead form

Start building your form

Cancel

Keap will save your progress as you build your form. If you need to stop in the middle of creating your form, click the **Save and exit** button.

✓ All changes saved

Save and exit

Center

Step 1: Build - Details

First, customize your form details by naming it, creating an internal description, and customizing the submit button.

1. Enter a **Form name**
2. Enter an optional **Headline** which will be displayed at the top of your form

The screenshot shows a 'Details' section with a title 'Details'. Below the title is a note: 'This public form can be seen by anyone with its URL.' There are two input fields: 'Form name' with the text 'Form name' and 'Headline (optional)' with the text 'Summer savings'. Below the headline field is a descriptive text: 'A headline that shows above the form fields'.

3. Enter a **Form description or instructions** which will only be visible in the form builder

This screenshot shows the 'Form description or instructions' field with the text 'This form was used to capture new leads with our summer savings offer'. Above it is the 'Headline (optional)' field with 'Summer savings' and the text 'A headline that shows above the form fields'. At the bottom, there is a 'Button text' field.

4. Customize the **Button text** for your form's submit button or leave it empty to default to "Submit"

This screenshot shows the 'Button text' field with the text 'Start saving'. Above it is the 'Form description or instructions' field with the text 'This form was used to capture new leads with our summer savings offer'. Below the button text field is a section titled 'Fields'.

Step 1: Build - Fields

Depending on the template you select, public forms include fields like first name, last name, email address, phone number, and phone type. You may add additional fields or even remove default fields to gather exactly what you need.

Pro-Tip: When using the State field you will need to also include the Country field in your form

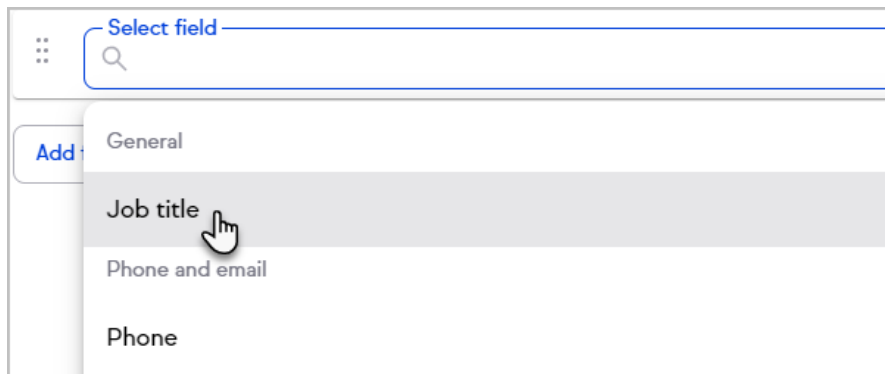
Add fields

1. Click **Add fields** at the bottom of the list of fields



The screenshot shows a list of existing fields: 'Email address', 'Phone', and 'Phone type'. At the bottom, there are two buttons: 'Add fields' and 'Create new field'. A mouse cursor is pointing at the 'Add fields' button.

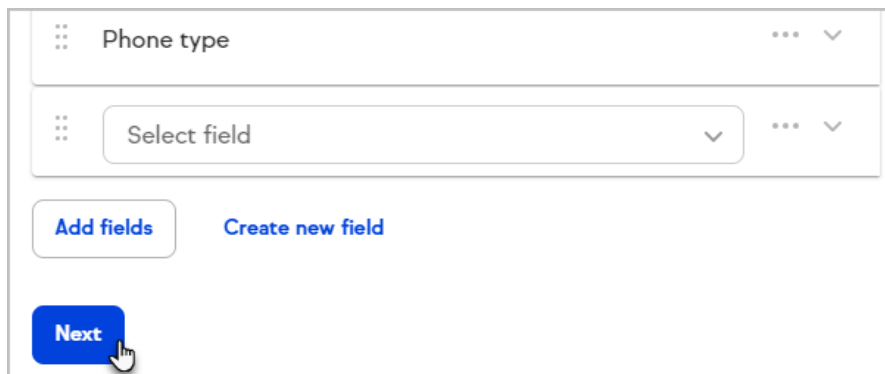
2. Select the desired field



The screenshot shows a search bar with the text 'Select field' and a magnifying glass icon. Below the search bar is a dropdown menu with the following options: 'General', 'Job title', 'Phone and email', and 'Phone'. A mouse cursor is pointing at the 'Job title' option.

3. Repeat these steps until you have added all your desired fields

4. Click **Next**



The screenshot shows the form builder interface with the 'Phone type' field and a 'Select field' dropdown menu. At the bottom, there are two buttons: 'Add fields' and 'Create new field'. A blue 'Next' button is visible at the bottom left, with a mouse cursor pointing at it.

Create new custom fields

Save time and stay in the zone instead of navigating to other areas of Keap when

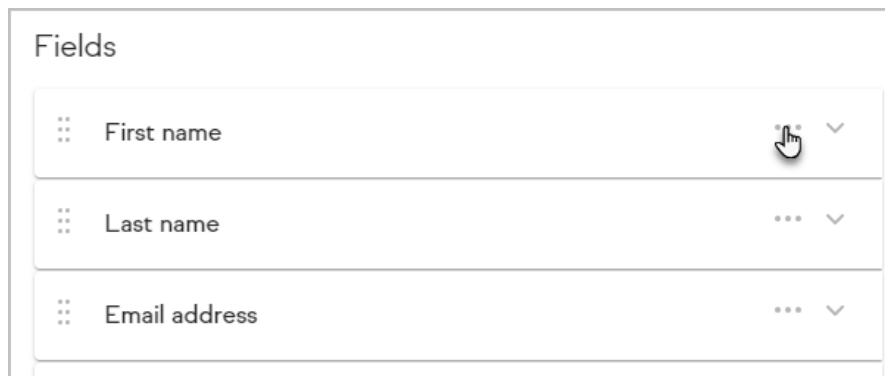
you realize you need a new [custom field](#) to capture a piece of information. Click the **Create new field** button to quickly create a custom field and continue working on your form.



A screenshot of a form configuration interface. It shows a list of three existing fields: 'Last name', 'Email address', and 'Phone'. Each field has a three-dot menu icon to its left. At the bottom of the list, there are two buttons: 'Add fields' and 'Create new field'. A mouse cursor is pointing at the 'Create new field' button.

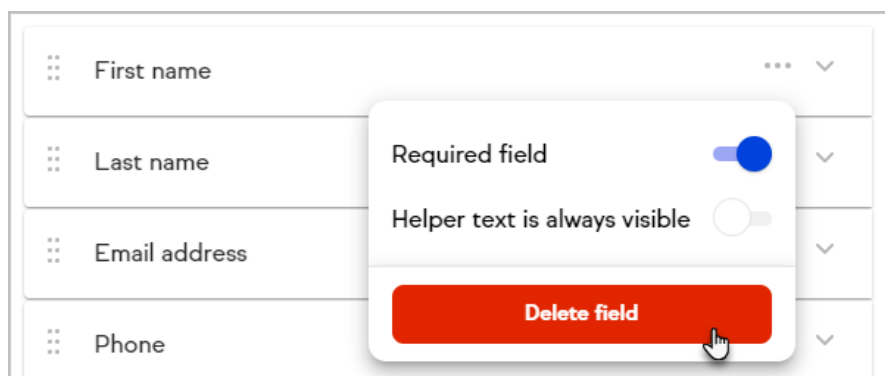
Delete fields

1. Click the ... button to open the overflow menu



A screenshot of a form configuration interface titled 'Fields'. It shows a list of three fields: 'First name', 'Last name', and 'Email address'. Each field has a three-dot menu icon to its right. A mouse cursor is pointing at the three-dot menu icon for the 'First name' field.

2. Click **Delete field**



A screenshot of a form configuration interface showing the overflow menu for the 'First name' field. The menu is open, displaying two toggle switches: 'Required field' (which is turned on) and 'Helper text is always visible' (which is turned off). At the bottom of the menu is a red button labeled 'Delete field'. A mouse cursor is pointing at the 'Delete field' button.

Helper text

Helper text will be stored in an icon next to a field or underneath fields in your form and can serve as a reminder for what type of information should be gathered.

1. Click the arrow icon to the right of a field to add help text to it

Fields

⋮	First name	⋮	⌵
⋮	Last name	⋮	⌵
⋮	Email address	⋮	⌵

2. Enter your helper text in the field

Fields

⋮	First name	⋮	⌶
	Helper text		
	Legal first name		
⋮	Last name	⋮	⌵

3. This text will display when someone hovers their cursor over the information icon on your form

Keap Help Center

First name*

Last name*

Email address*

Legal first name

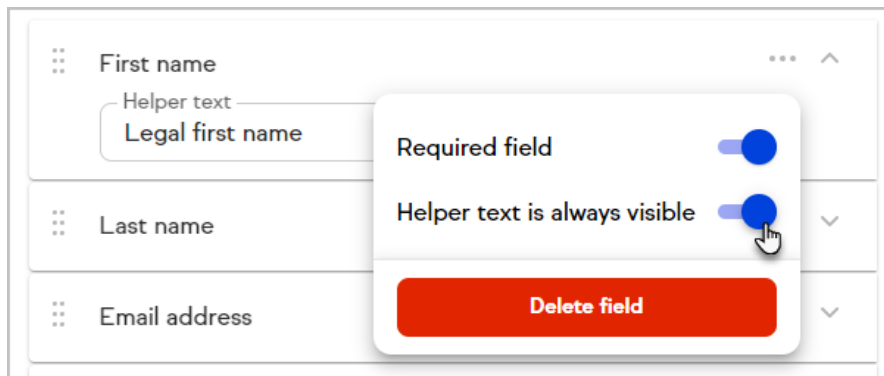
To always show your helper text beneath a field:

1. Click the ... button to open the overflow menu

Fields

⋮	First name	⋮	⌵
⋮	Last name	⋮	⌵
⋮	Email address	⋮	⌵

2. Toggle the **Helper text is always visible** to the on position



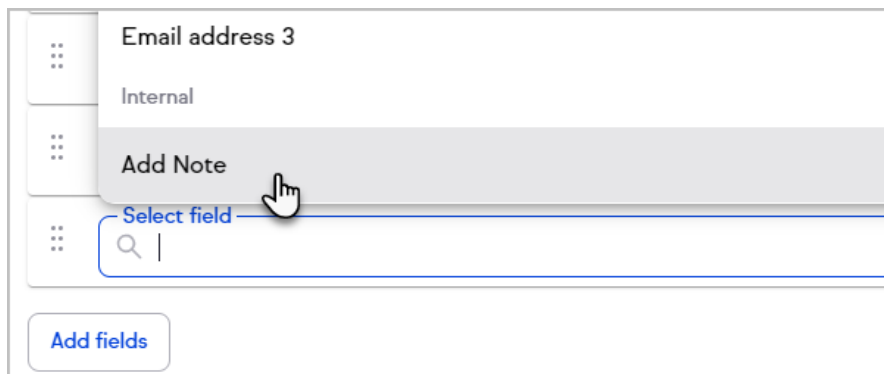
The helper text will always be provided beneath the field.



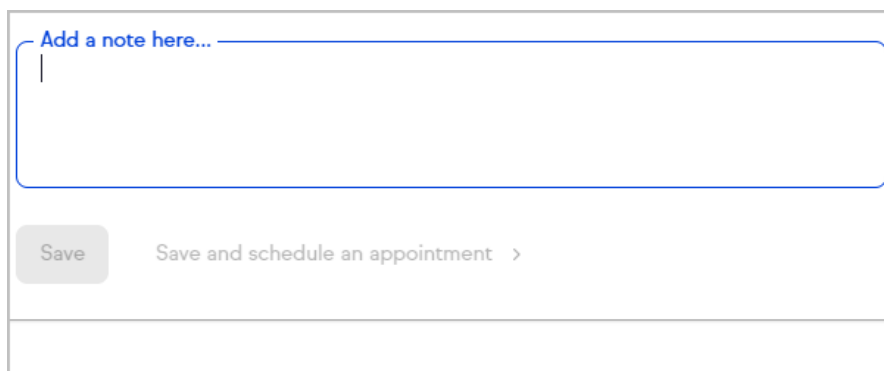
Internal fields

Public forms can be used to add notes to your contacts in Keap.

1. Scroll to the **Internal** section of the add field menu



The **Add Note** field will include a text field on your form that will create a note on the Contact record



Reorder form fields

1. Click and hold a form field



The screenshot shows a 'Fields' panel with three rows. Each row contains a three-dot menu icon on the left, the field name in the center, and a three-dot menu icon with a downward arrow on the right. The rows are: 'First name', 'Last name', and 'Email address'. A mouse cursor is positioned over the 'Email address' field.

2. Drag the field and release the mouse button to change the form's order

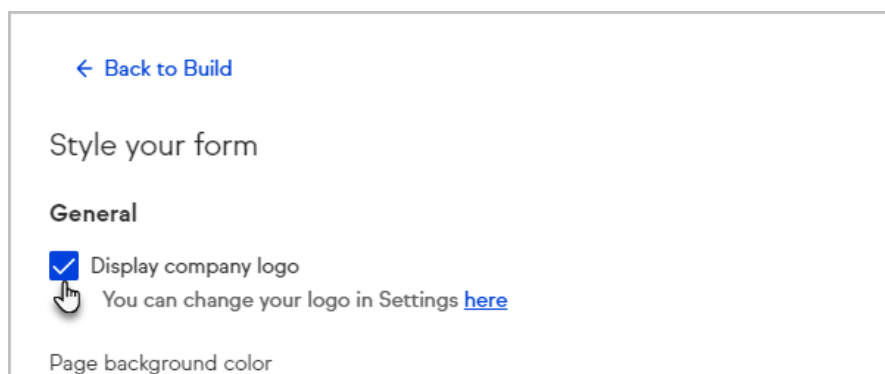


The screenshot shows the 'Fields' panel after reordering. The rows are now: 'Email address', 'First name', and 'Last name'. The 'Email address' field is now at the top, and the other two fields have shifted down.

Step 2: Style your form

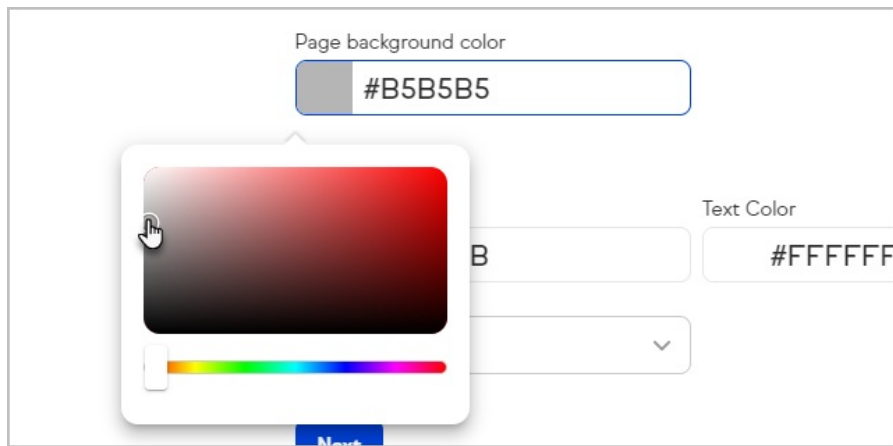
Customize the appearance of your form by choosing to display your logo, setting a page background color, button background color, button text color, and button alignment.

1. Choose whether or not your [company logo](#) should be included on your form

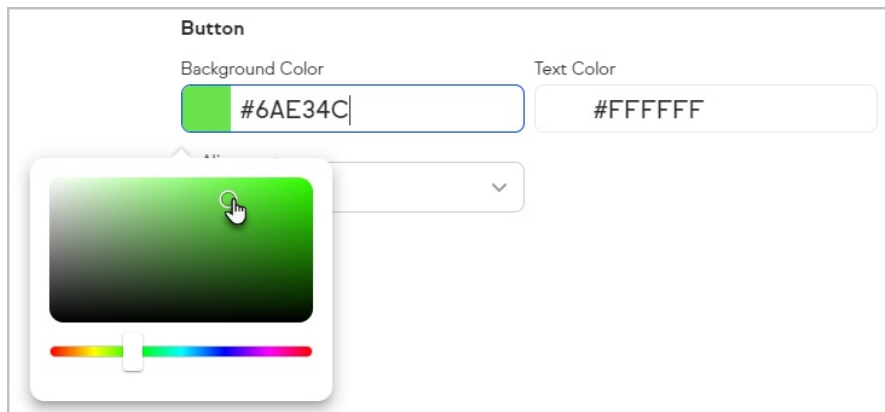


The screenshot shows a 'Style your form' settings panel. At the top left is a blue link with a left arrow: '< Back to Build'. Below that is the title 'Style your form'. Under the 'General' section, there is a checked checkbox for 'Display company logo' with a mouse cursor hovering over it. Below the checkbox is the text 'You can change your logo in Settings [here](#)'. At the bottom of the visible area is the label 'Page background color'.

2. Select a page background color to match the site where you'll embed your form



3. Set your button's background and text color

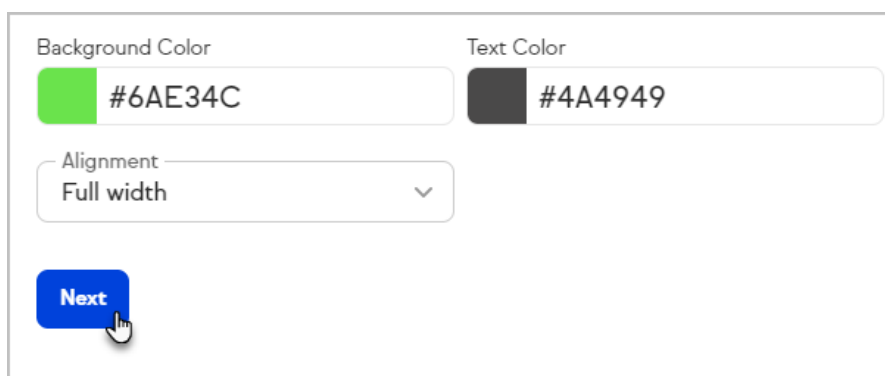


4. Choose your button's alignment

Note: "Full width" will stretch the button to be as wide as your form



5. Click **Next**

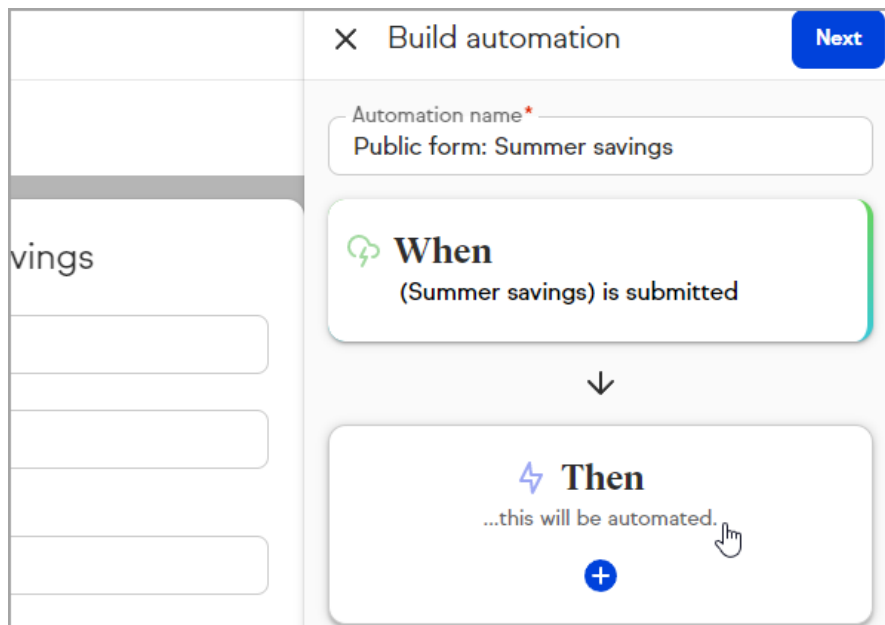


Step 3: Automate follow-up for your form

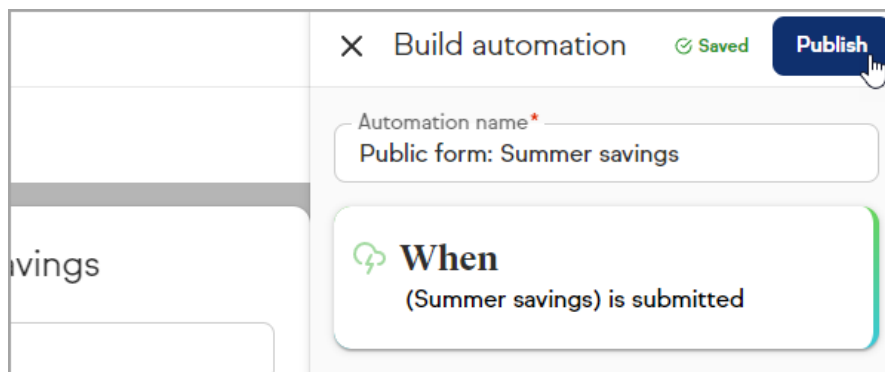
1. Click **New automation**



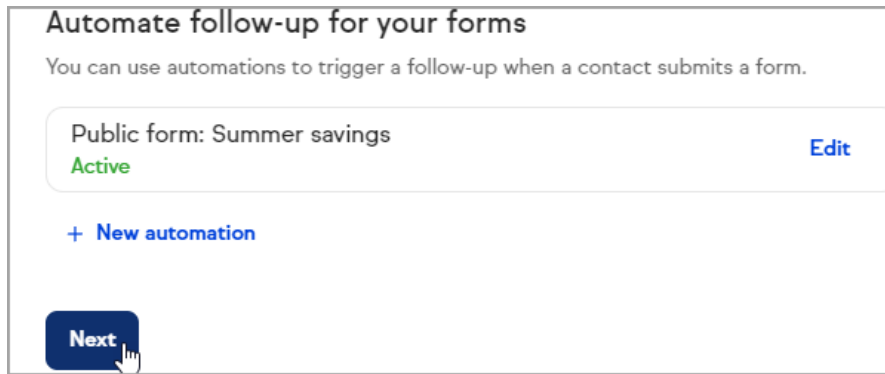
2. The Easy Automation builder will slide in from the right with a pre-named automation and the When already set
3. Click **Then** to create your [easy automation](#)



4. Once your automation is set, click **Preview**
5. Click **Publish**



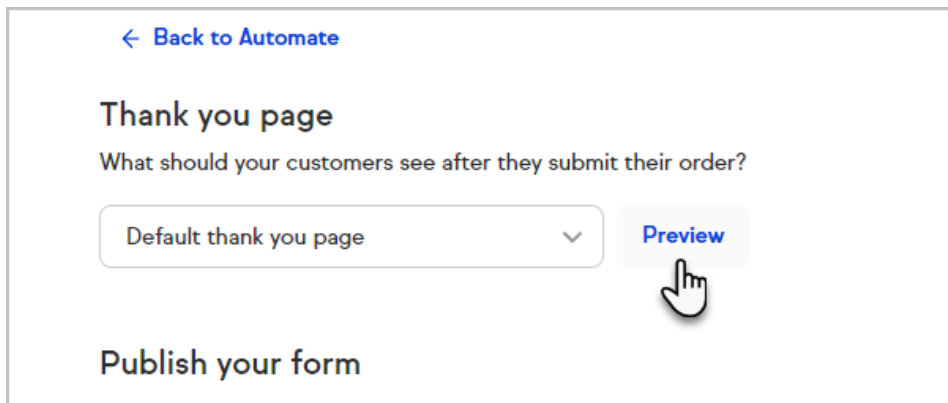
6. Click **Next**



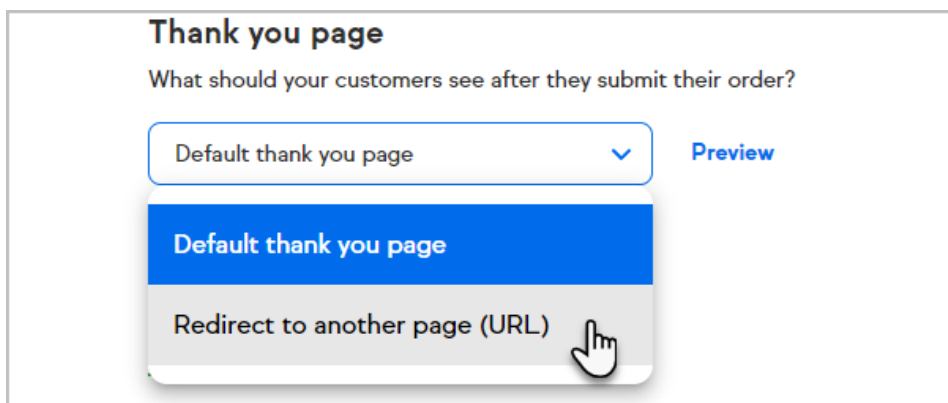
Step 4: Publish your form

Once your form is ready to go, you can embed it directly on your website or share a link to a Keap-hosted page containing your form. Any time you need your embed code or hosted page link, you can return to this step of the form builder.

To preview the Thank you page, just click the **Preview** button



You can also redirect the user to your own custom Thank-you web page by selecting the option in the drop-down and entering your URL.



Embedded form

To embed the form, copy the code from Keap and [paste it into your site's HTML](#)

Embedded form **Hosted page**

To embed your form on your website, copy this code and paste it into your website's HTML. For instructions, check out our [help article](#).

```
<div data-form-slug="1253269190571471" data-env="staging" data-path="contact-us/1253269190571471" class="keep-custom-form"></div><script>(function(a,b){var c=a.KeepForms||{SNIPPET_VERSION:"1.1.0",appId:"jd188stge"},d=b.createElement("script");d.src="https://www.KeepForms.com/js/keep-forms.js";d.async=true;d.onload=function(){c.ready=true};document.getElementsByTagName("script")[0].parentNode.appendChild(d)})(window,document)
```

 [Copy code](#)

Hosted page

To get a shareable link that goes directly to your form, click the **Hosted page** tab and click **Copy link**

Publish your form

Publish your form to make it visible when embedded on your website or on a hosted page provided by Keep.

Embedded form **Hosted page**

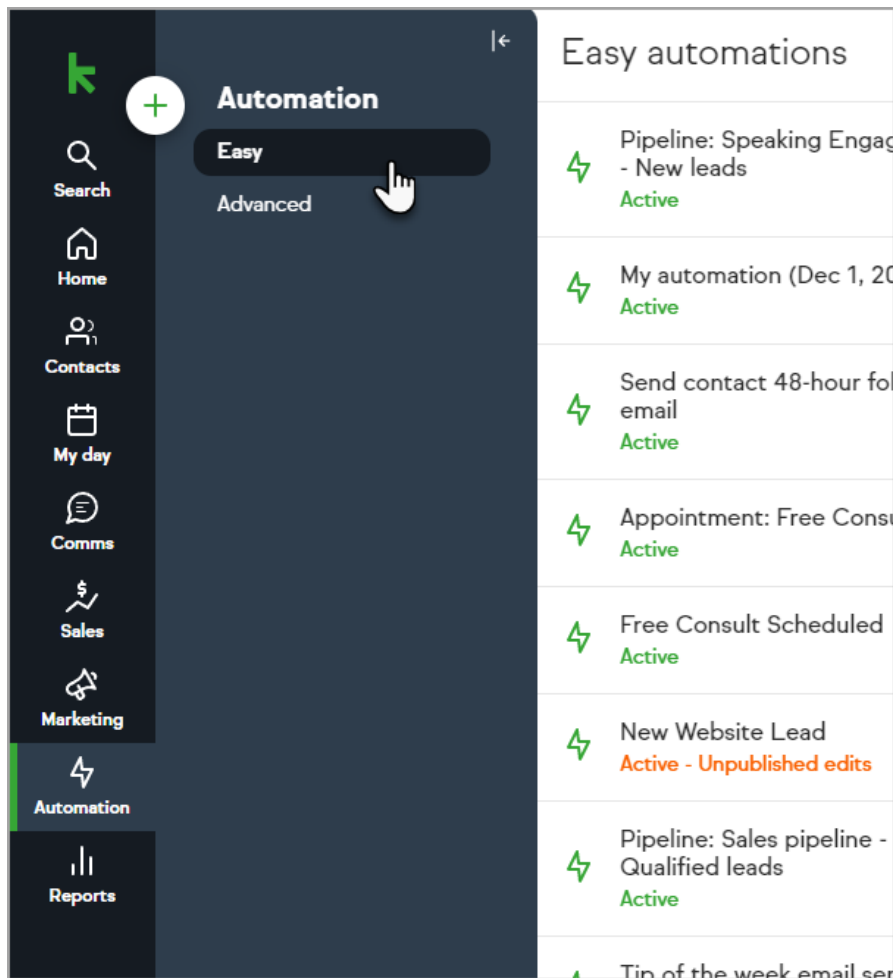
Your page is automatically set up on a hosted page.

 [Copy link](#)

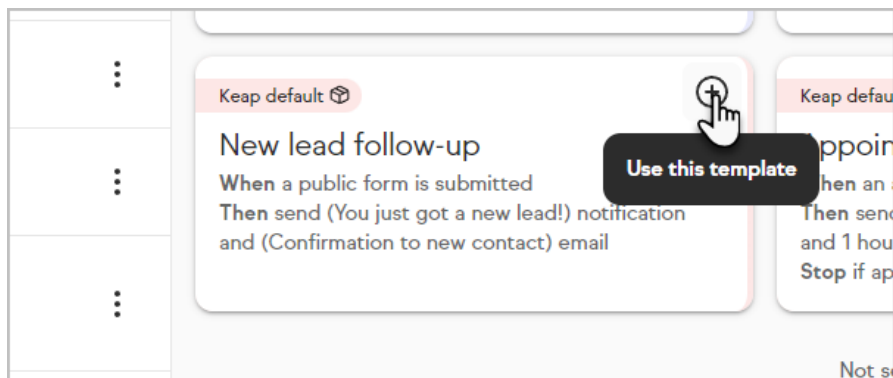
Customize your form's confirmation email

If you do not automate your form in Step 3 when creating your first public form, Keep will create an [Easy Automation](#) to send a confirmation email to your new leads and all users in your Keep app. You can customize this email by modifying the message, when it sends, which public forms trigger it, and much more.

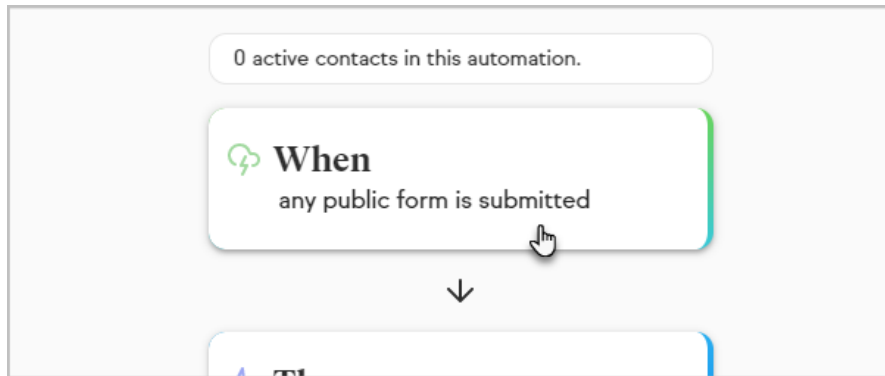
1. Save and publish at least one public form
2. Navigate to **Automations > Easy**



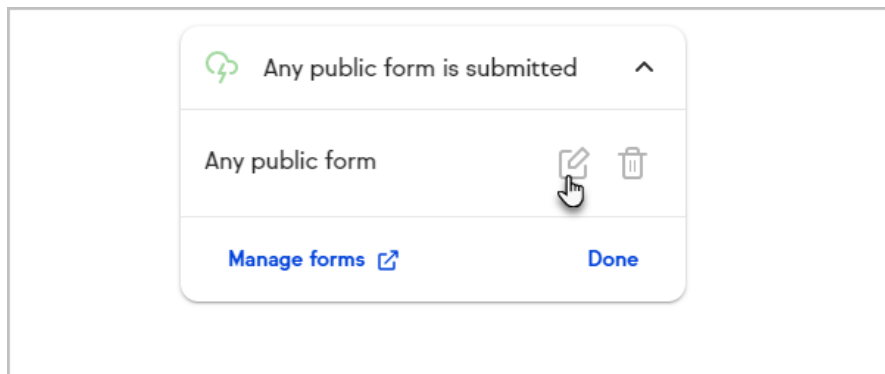
3. Ensure you are on the **Easy** tab and click your **New lead follow-up** automation
4. If you cannot find your New lead follow-up automation, you can create it from your templates.



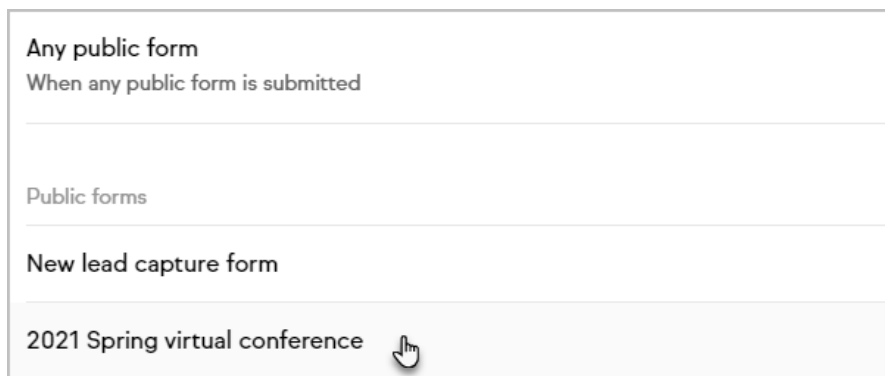
5. Click the **When** card to modify what triggers this automation



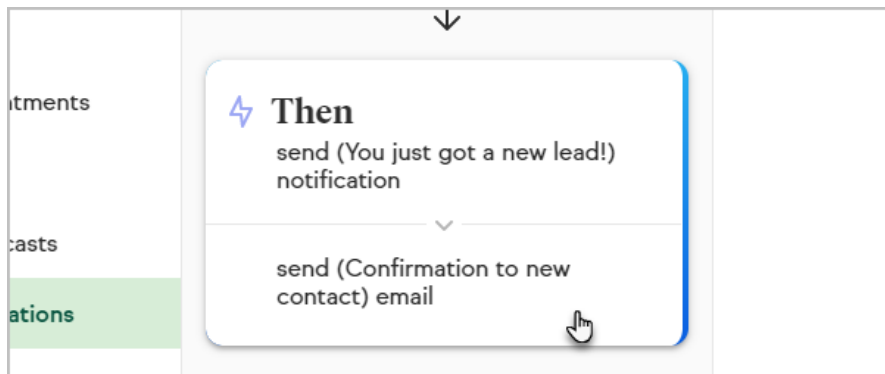
6. Expand the card and click the edit button to change which forms trigger the automation



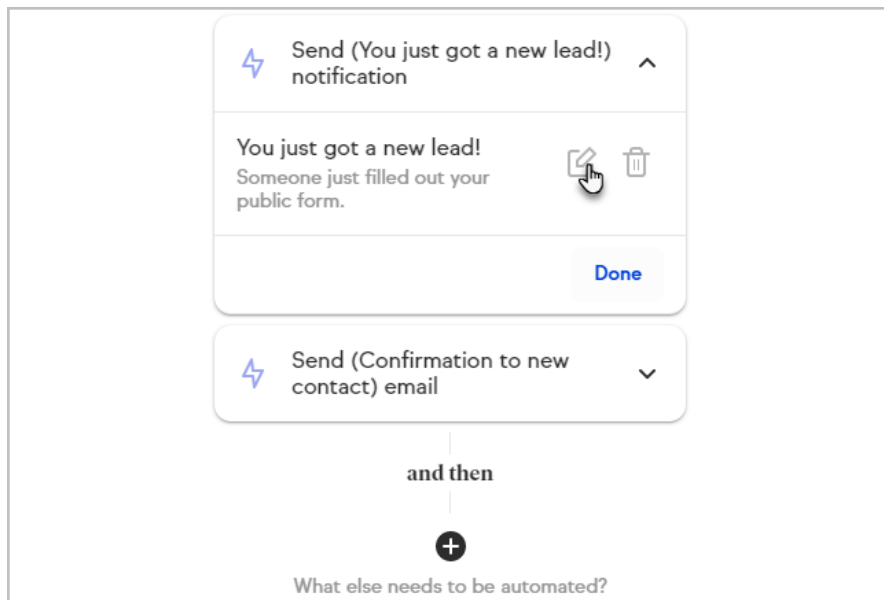
7. Select which form triggers the automation: either a single, specific public form or all of your public forms



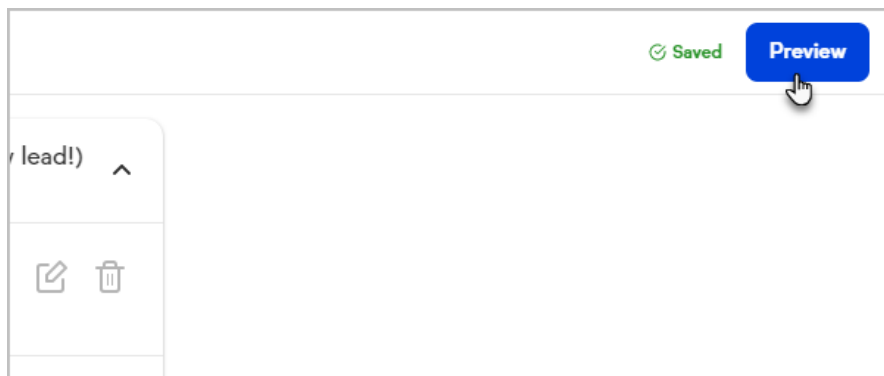
8. Click the **Then** card to modify what actions occur



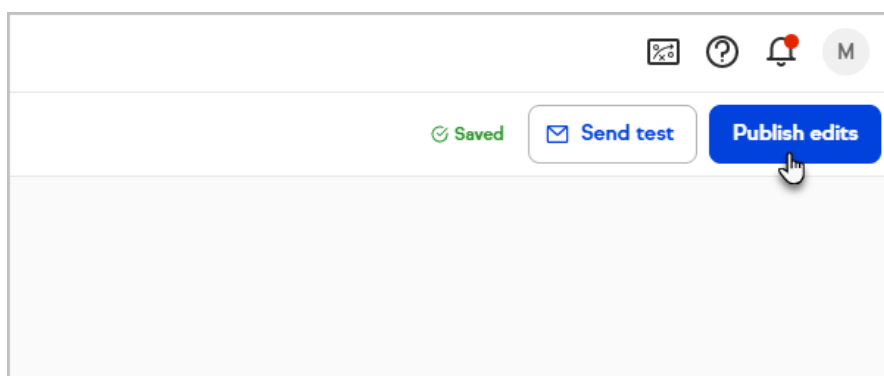
9. Expand one of the existing actions and click the edit button to modify it, or add additional actions by clicking the + button



10. When modifying the email confirmation sent to a customer, you can set the email title, subject, sender, and message.
When modifying the notifications Keep users receive for a public form, you can set the notification recipient, type, subject, desktop or mobile content, and email content.
11. Click **Next** once you've made your updates
12. Update the timing of the action and click **Next**
13. Click **Preview** once you've finished modifying the automation

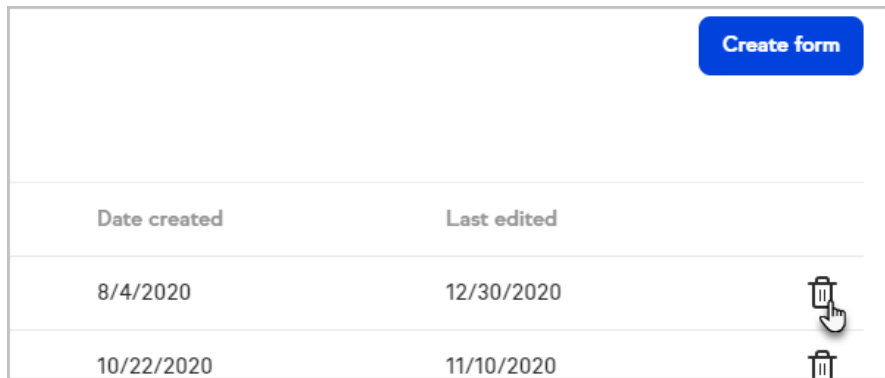


14. Click **Publish edits** to finalize your changes and make them live





Delete a public form

1. Navigate to the **Public forms** page
2. Click the trash bin icon next to the form



The screenshot shows a user interface for managing public forms. At the top right, there is a blue button labeled "Create form". Below it is a table with two columns: "Date created" and "Last edited". The table contains two rows of data. To the right of each row is a trash bin icon, with a mouse cursor hovering over the one for the first row.

Date created	Last edited	
8/4/2020	12/30/2020	
10/22/2020	11/10/2020	

3. Confirm your choice by clicking **Delete**

