

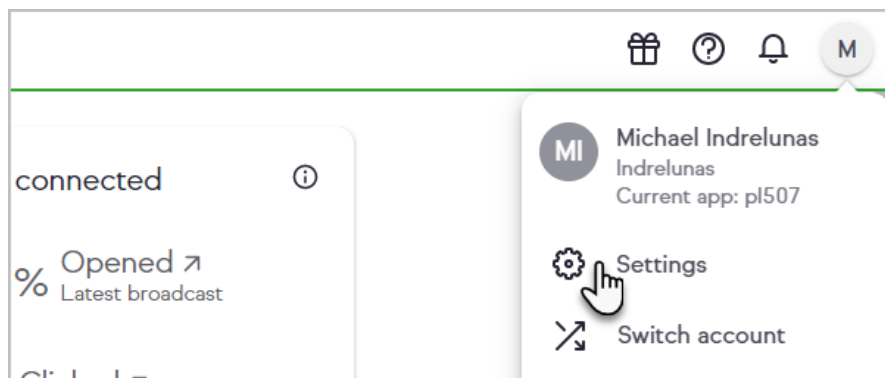
Internal forms

This article applies to:

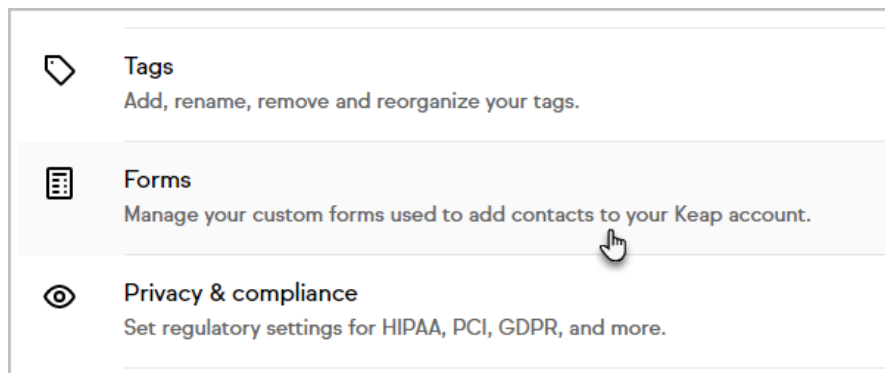
No two businesses are alike. With a custom internal form, you can add fields that are specific to your business process, allowing you to capture all the essential details when adding a new contact. Design your form with the right fields for accuracy and efficiency.

How to create an internal form

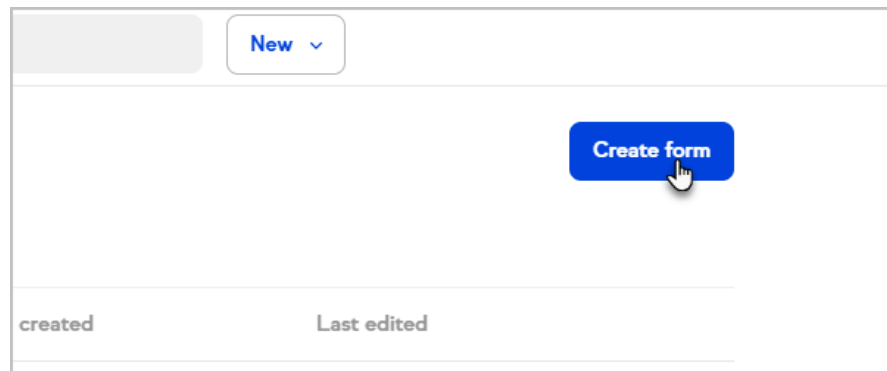
1. Navigate to **Settings**



2. Click **Forms**



3. Click **Create form**



4. Select **Internal**

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* when they're embedded or published

5. Select a template

Select template

Jump start your form with common fields already added.

Template name

Intake form

Intake form

Shipping address

6. Click **Start building your form**

Select template

Jump start your form with common fields already added.

Template name

Intake form

Start building your form

Cancel

7. Name your form and add an optional description to document the purpose of the form

Form name and description will both appear on the form itself and as a way to identify this form within Keap. The intended audience will determine what type of form you're building.

Form name

Intake form

Form description or instructions

8. Customize the text for your form's submit button

Form description or instructions

Use this when adding new clients to Keap

Button text

Add client

Fields

Add fields

Internal forms include first name, last name, email address, and phone number fields by default. You may add additional fields or even remove the default fields.

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

⋮ Email address ⋮ ▾

⋮ Phone ⋮ ▾

⋮ Phone type ⋮ ▾

Add fields
Create new field

2. Select the desired field

⋮ Select field 🔍

Add

- General
- Job title 👤
- Phone and email
- Phone

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

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.

☰ Last name

☰ Email address

☰ Phone

Add fields Create new field

Delete fields

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

Fields

☰ First name ⋮

☰ Last name ⋮

☰ Email address ⋮

2. Click Delete field

☰ First name ⋮

☰ Last name ⋮

☰ Email address ⋮

☰ Phone ⋮

Required field

Helper text is always visible

Delete field

Helper text

Helper text will be stored in an icon next to a field or underneath fields in your internal 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 you hover your cursor over the information icon on your form

Preview

Intake form

First name*

Last name*

Legal first name

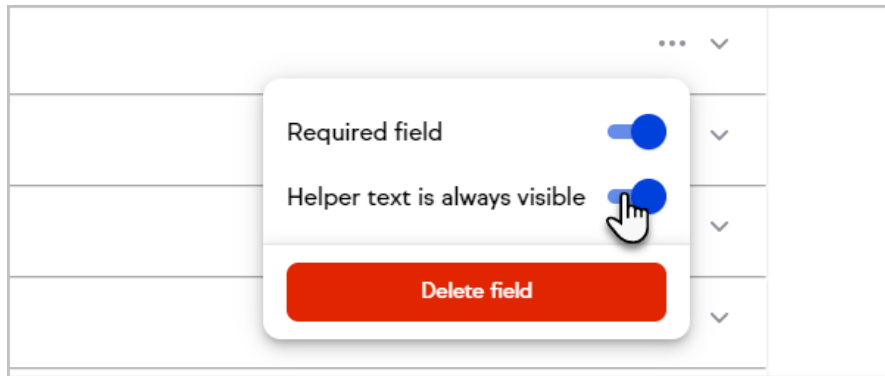
To always show your helper text beneath a field:

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

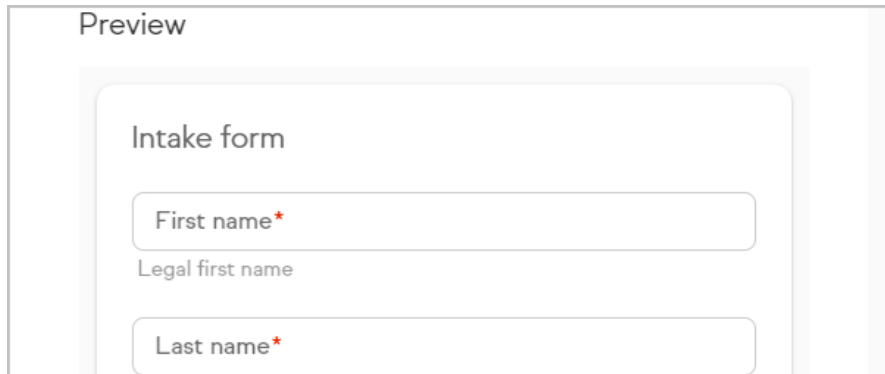
Fields

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

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



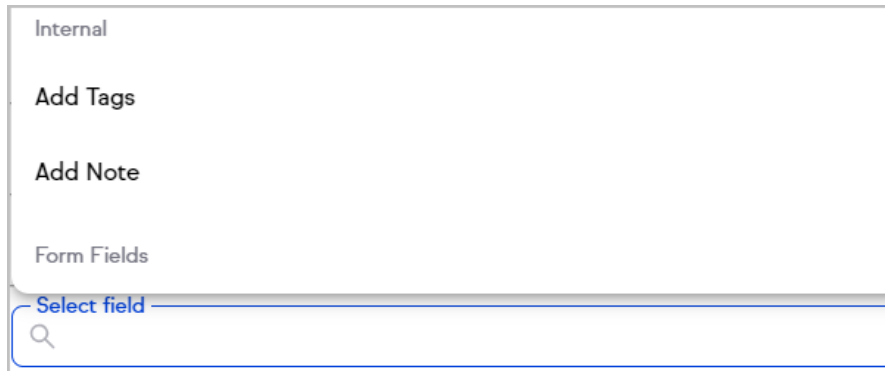
The helper text will always be provided beneath the field.



Internal fields

Internal forms can be used to add tags or notes to your contacts.

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



The **Add Tags** field will allow you to add tags or select an existing tags to apply to the contact

A dropdown menu with the placeholder text "Add new or existing tag...". Below the dropdown, there is a "+ Add" button and two tag options: "Customer Tags -> Appointment > No-show" and "Customer Tags -> New Customer".

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

A text input field with the placeholder text "Add a note here...". Below the field are two buttons: "Save" and "Save and schedule an appointment >".

Form fields

Form fields are only found on the internal form, and are **not** the custom fields listed on the contact record.

You can create unlimited form fields which can trigger automation in the advanced automation. [Click here](#) to see how!

1. To add a form field to your internal form, scroll to the bottom of the add field menu to the **Form Fields** section

A menu titled "Form Fields" with options: "Checkbox", "Select", and "Radio". The "Radio" option is highlighted with a grey background. Below the menu is a search bar labeled "Select field" with a magnifying glass icon.

2. Select the desired type of form field
3. Enter each field option for the form field on a separate line

Field label
Field options* Marketing Design Lead generation
Enter one option per line. Field options will be displayed as a list in the order you create them.
Helper text

A **checkbox** form field allows for multiple selections

Business needs
<input checked="" type="checkbox"/> Marketing
<input type="checkbox"/> Design
<input checked="" type="checkbox"/> Lead generation

A **select** form field creates a drop-down menu and allows only one selection

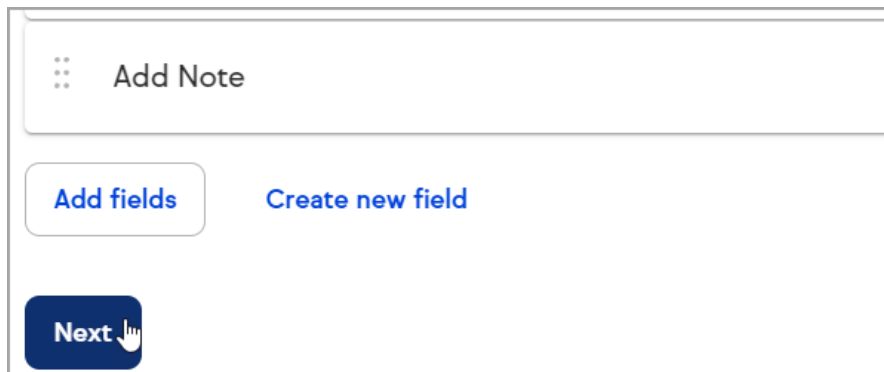
Business needs
Marketing
Design
Lead generation

A **radio** form field allows only one selection

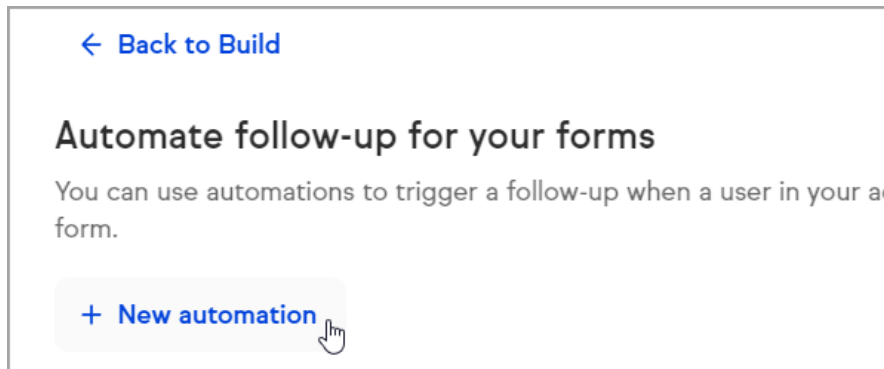
Business Needs
<input type="radio"/> Marketing
<input checked="" type="radio"/> Design
<input type="radio"/> Lead generation

Automate your follow-up

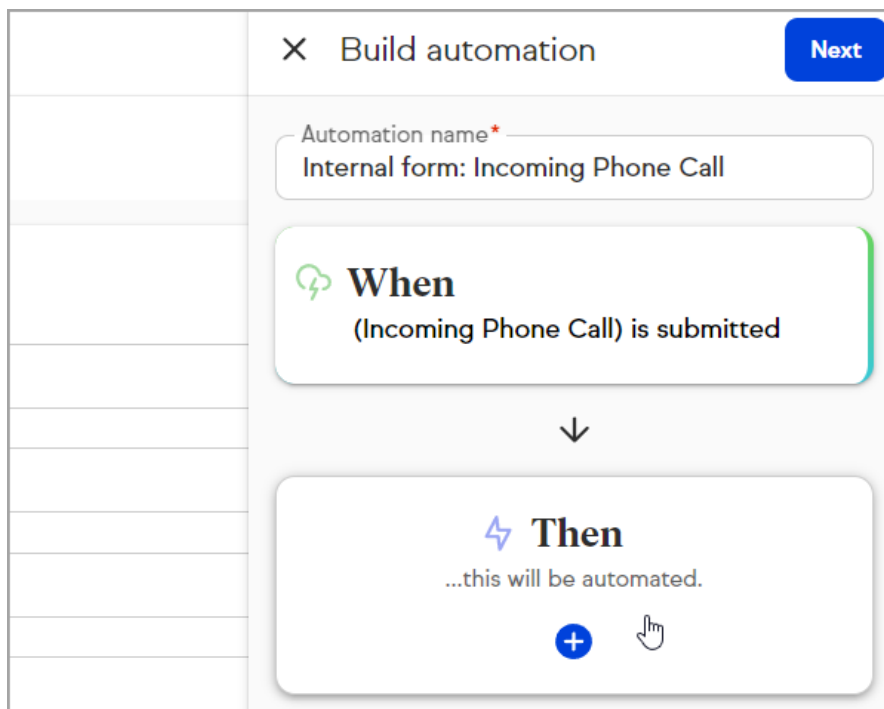
1. Click **Next** after creating your internal form



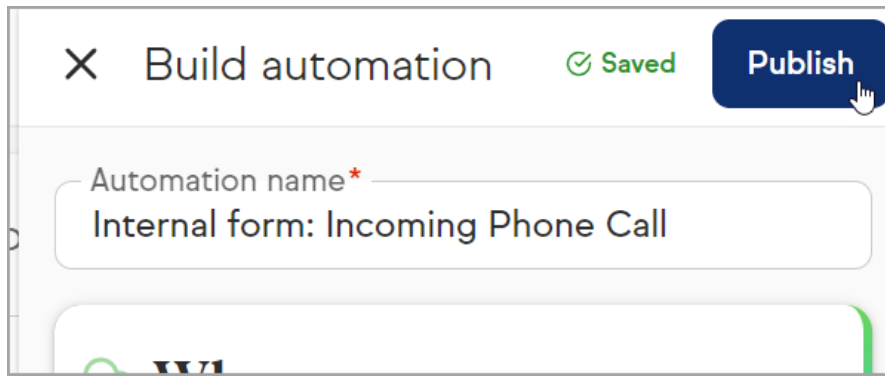
2. Click **New automation**



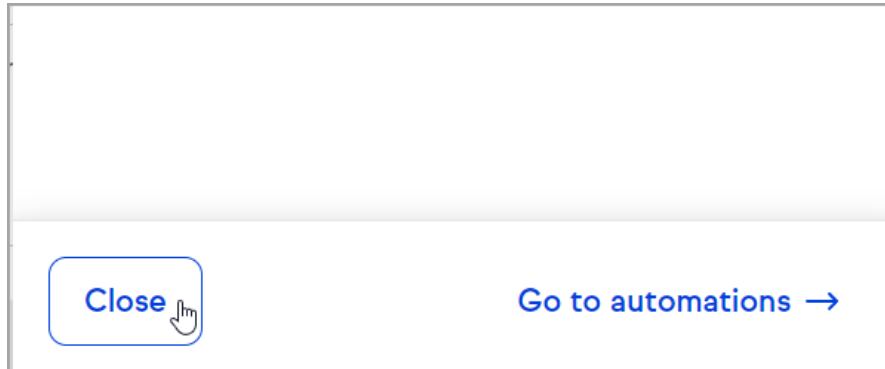
3. The Easy Automation builder will slide in from the right with a pre-named automation and the When already set
4. Click **Then** to create your easy automation



5. Once your automation is set, click **Preview**



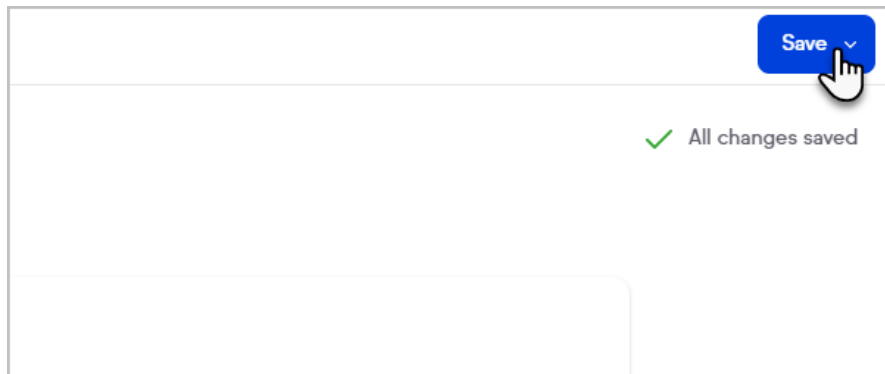
6. Click Close



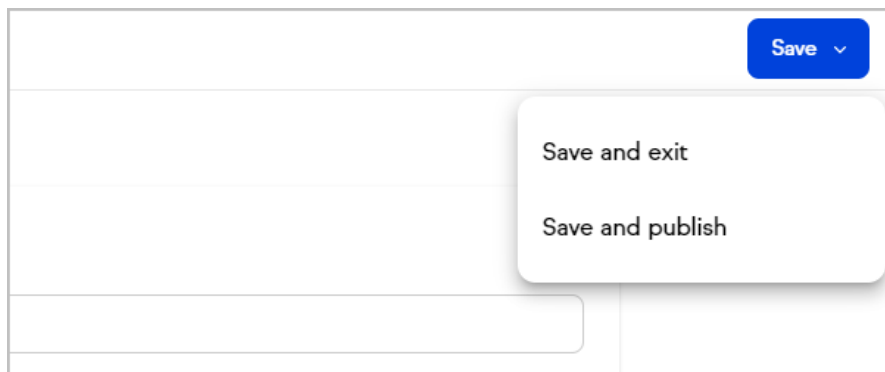
Publish your form

Your form will save your progress as you're working. Once your form is complete, you'll need to publish it.

1. Click Save



2. Click Save and publish

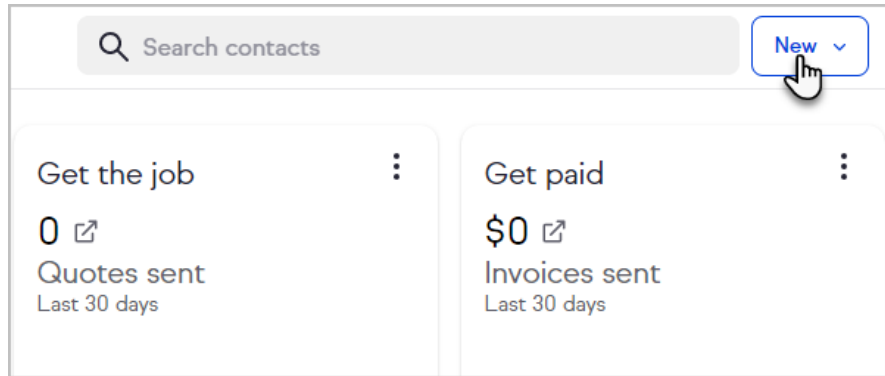


You may also click **Save and exit** if you want to stop working on your form without publishing it.

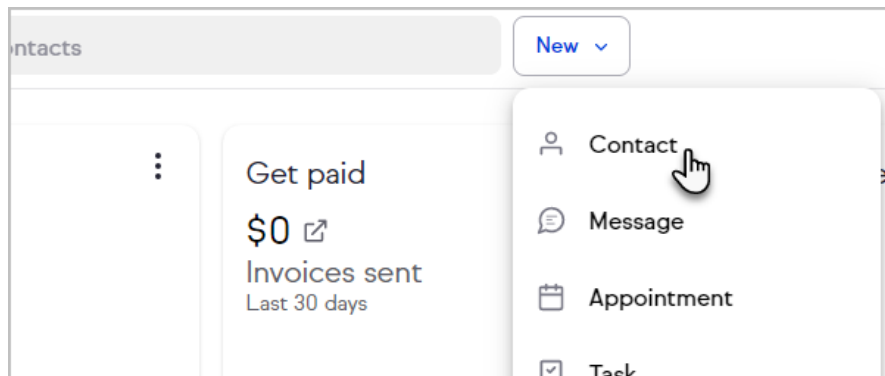
Add a new contact with your internal form

You can use your form from anywhere in your app or within your Contacts page.

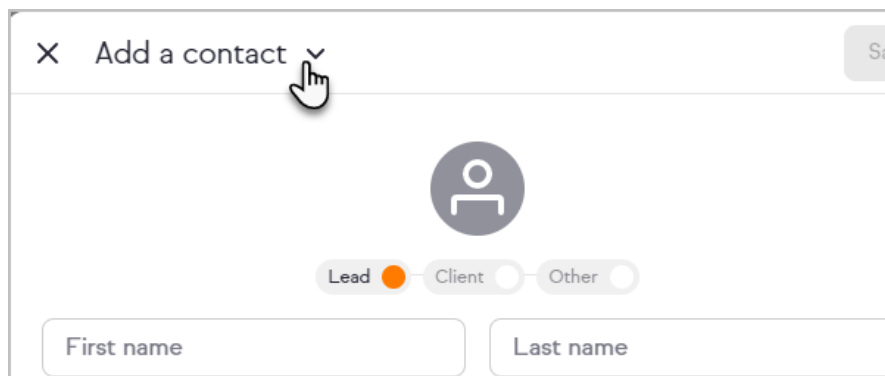
1. To use your internal form from any page in Keap, click the **New** button



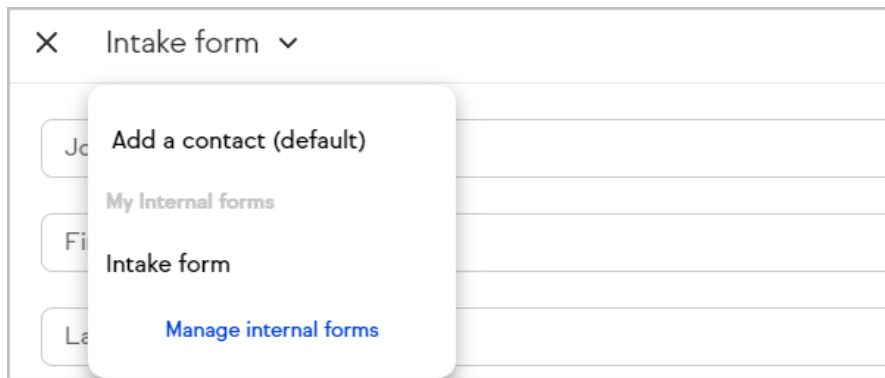
2. Click **Contact**



3. Click **Add a contact**



4. Select the internal form to use

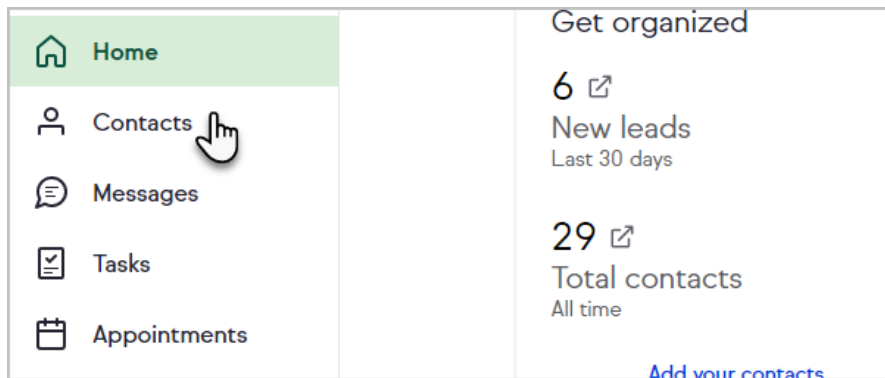


5. Complete and submit the form

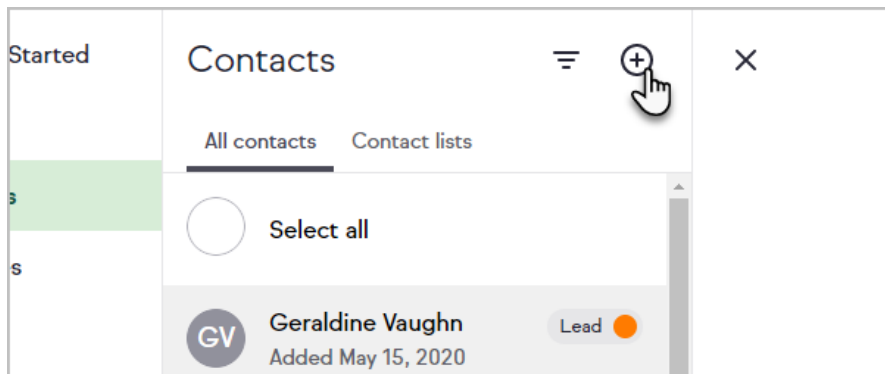
A screenshot of a form with three input fields and a submit button. The first field is 'Email address' with the value 'boblowblawlawblog@blogpsot.com'. The second field is 'Phone' with the value '5555554566'. The third field is a dropdown menu labeled 'How long do you see your animation being?' with the selected value '5 min +'. At the bottom left is a blue 'Submit' button with a hand cursor over it.

You can also access your internal form when viewing your contact lists.

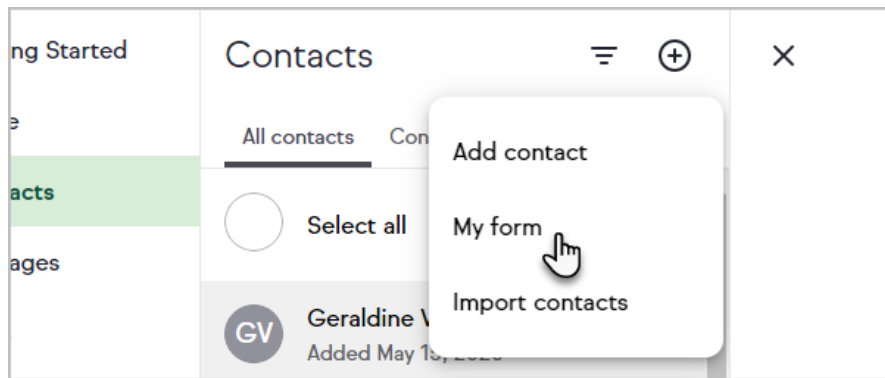
1. Navigate to the **Contacts** page



2. Click the + button at the top of your contacts list



3. Select the desired form



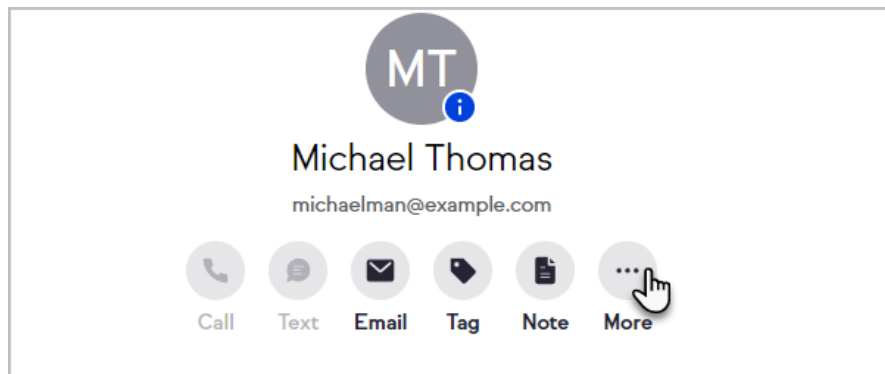
4. Complete the form and click Save

A screenshot of a contact form. It has several input fields: 'Job title' with 'CEO', 'Last name' with 'Bartleson', 'Birthday' with 'May 11, 1966' and a calendar icon, 'Contact type' with a dropdown menu set to 'Client', and 'Email address' with 'newlead@keap.com'. At the bottom, there is a blue 'Save' button with a hand cursor pointing to it, and a link that says 'Save and schedule an appointment >'.

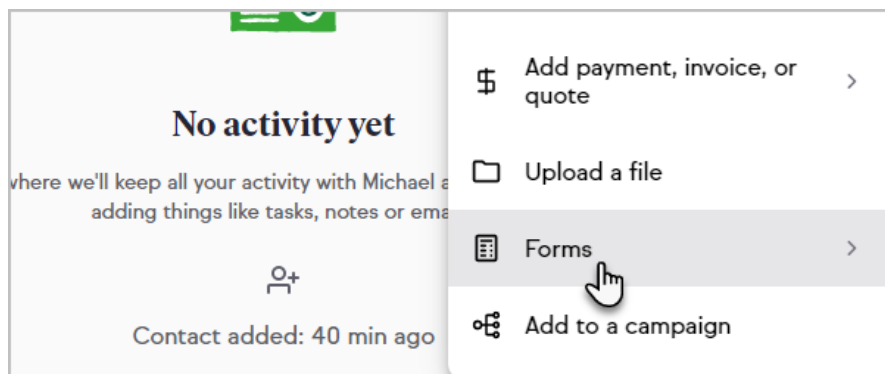
Job title CEO	Last name Bartleson
Birthday May 11, 1966	Contact type Client
Email address newlead@keap.com	

Update an existing contact with an internal form

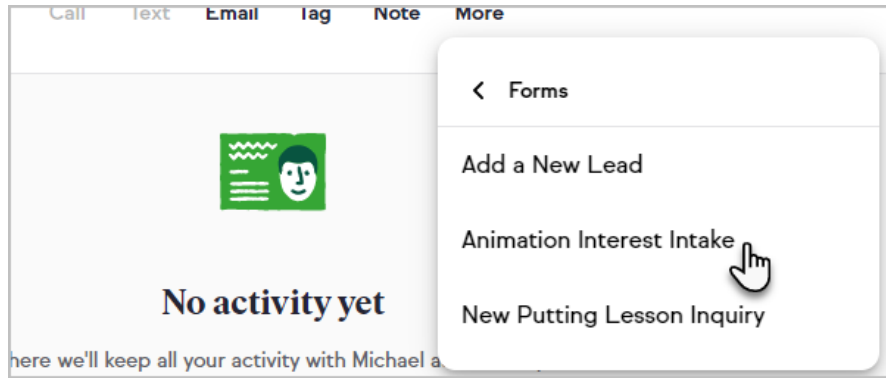
1. Navigate to a contact record
2. Click the More button



3. Select Forms



4. Select the form to use



5. Complete the form

6. Click Update contact

A screenshot of a contact form. The form has three input fields. The first field contains the name 'Thomas'. The second field is labeled 'Email address' and contains 'michaelman@example.com'. The third field is labeled 'How long do you see your animation being?' and contains '1-3 min'. Below the fields is a blue button labeled 'Update contact'. A hand cursor is pointing at the 'Update contact' button.