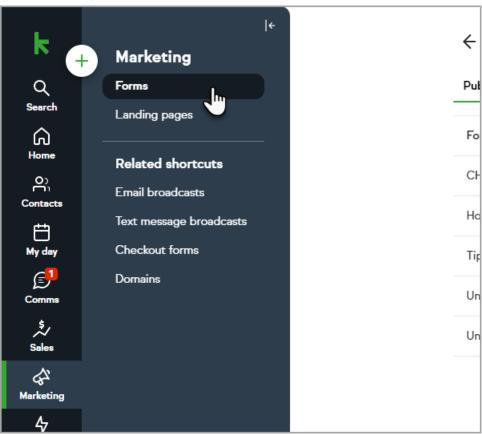
# **Internal forms**

Last modified on: 04/21/2025 10:23 am MST Tags: Keap-Pro Keap-Max Keap-Ultimate

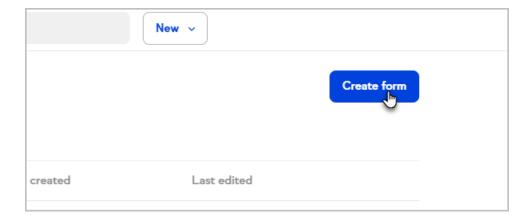
No two businesses are alike. With a custom internal form, you can add fields that are specific to your business process, allowing you to capture all the essential details when adding a new contact. Design your form with the right fields for accuracy and efficiency.

#### How to create an internal form

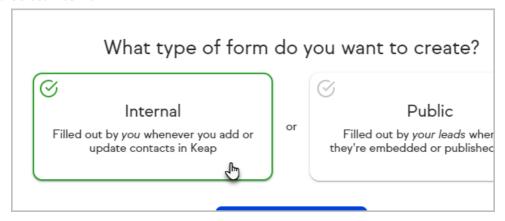
1. Go to Marketing > Forms



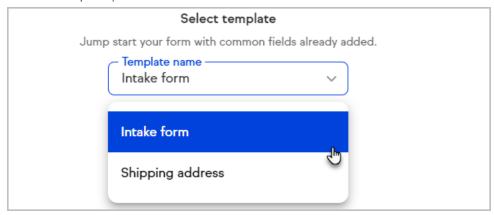
2. Click Create form



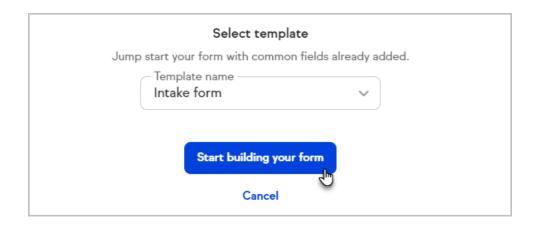
#### 3. Select Internal



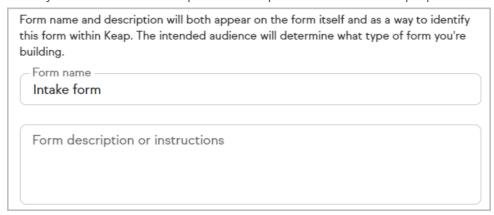
#### 4. Select a template



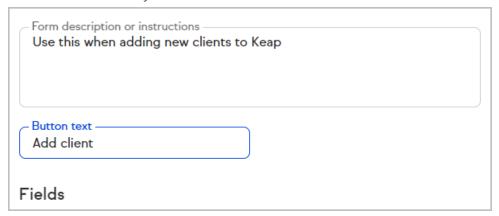
#### 5. Click **Start building your form**



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



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



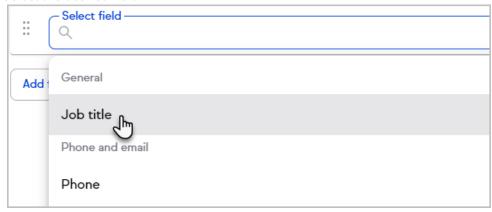
#### Add fields

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



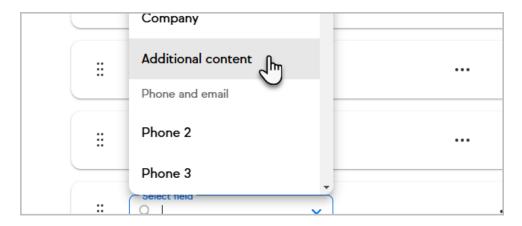
2. Select the desired field

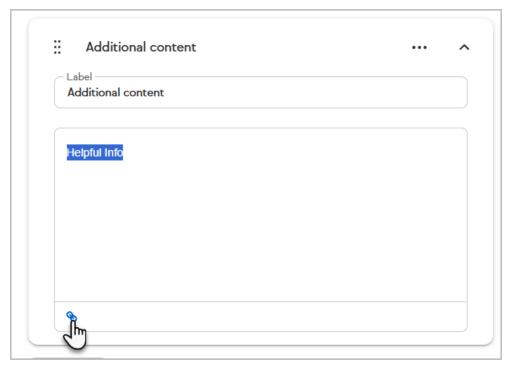


3. Repeat these steps until you have added all your desired fields

#### **Additional content**

Note that you can further customize your form by adding Additional content fields. Note that as this is an internal form, it supports text and hyperlinks. A public form supports both hyperlinks and merge fields. To hyperlink, just highlight the text, click the link button and add the URL. Please note that it is not possible to further style the text in the additional content section.







### **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.

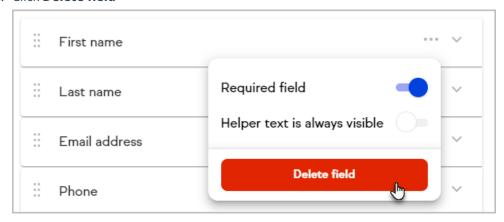


### **Delete fields**

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



#### 2. Click 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



2. Enter your helper text in the field



3. This text will display when you hover your cursor over the information icon on your form



To always show your helper text beneath a field:

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



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



The helper text will always be provided beneath the field.



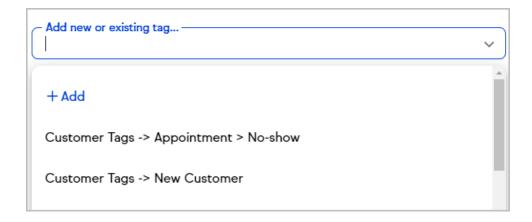
### **Internal fields**

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

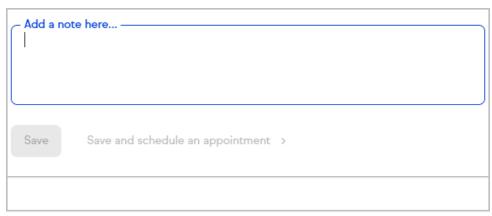
1. Scroll to the **Internal** section of the add field menu



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



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

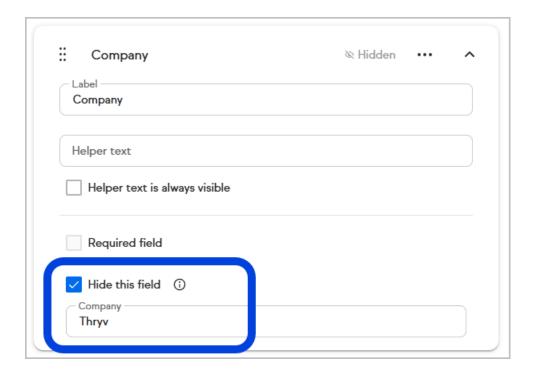


#### **Hidden Fields**

You have the option to set most fields to "hidden". You can also manually enter the information that will be set for the field. This can be useful when:

- Passing hidden data like an event date, or company name (data that will be consistent for each person that fills out the form and will later be used to segment those contacts) to the contact record when the form is submitted.
- When you want to help prevent the user from modifying the values set in the contact fields

In this example, I've hidden the "Company" field and entered the value, "Thryv" to be set as the value of the hidden custom field on the form. When this form is submitted, the contact's Company field will be updated to the new value.



## Form fields



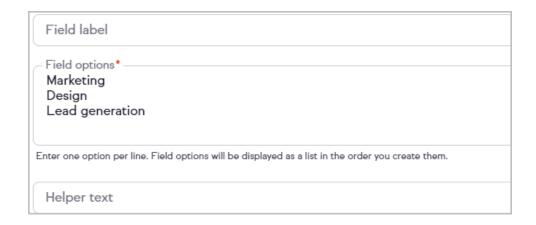
Form fields are only found on the internal form, and are**not** the custom fields listed on the contact record.

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



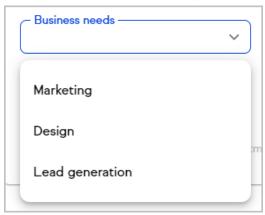
- 2. Select the desired type of form field
- 3. Enter each field option for the form field on a separate line



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



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



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

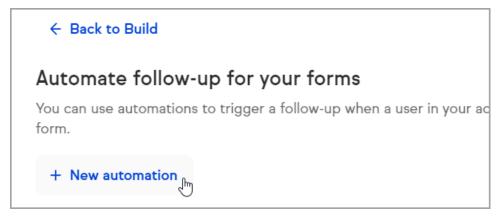


# Automate your follow-up

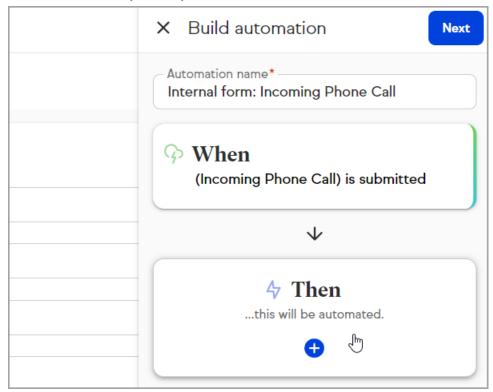
1. Click **Next** after creating your internal form



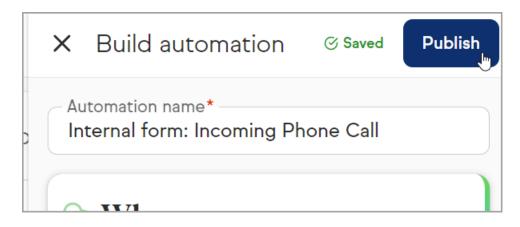
2. Click New automation



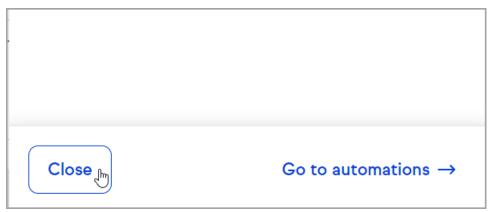
- 3. The Easy Automation builder will slide in from the right with a pre-named automation and the When already set
- 4. Click **Then** to create your easy automation



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



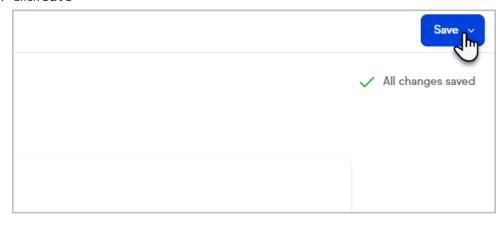
6. Click Close



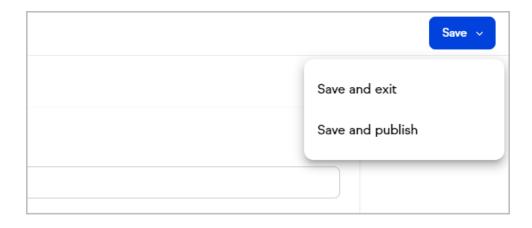
# **Publish your form**

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

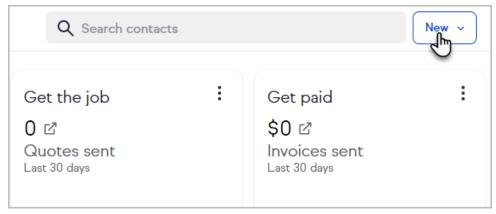


You may also click **Save and exit** if you want to stop working on your form without publishing it.

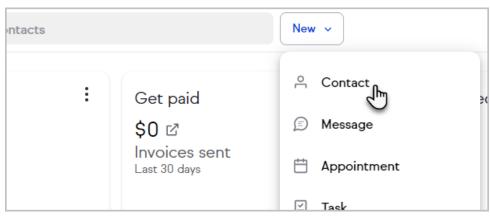
## Add a new contact with your internal form

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



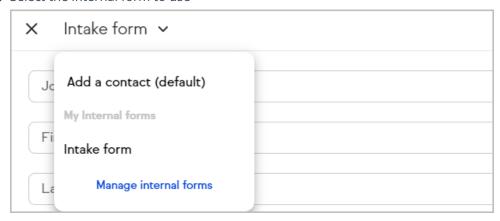
#### 2. Click Contact



3. Click Add a contact



4. Select the internal form to use

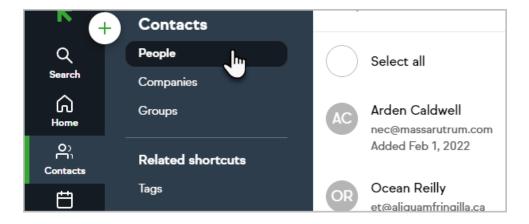


5. Complete and submit the form

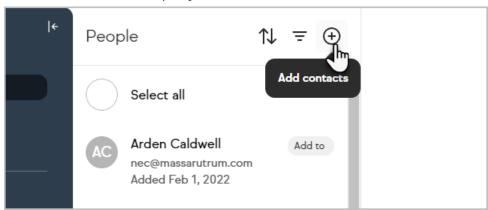


You can also access your internal form when viewing your contact lists.

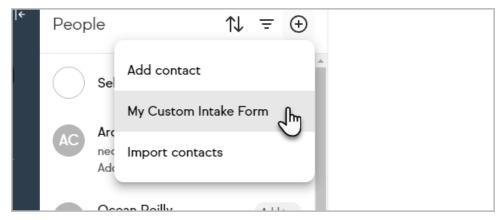
1. Navigate to Contacts > People



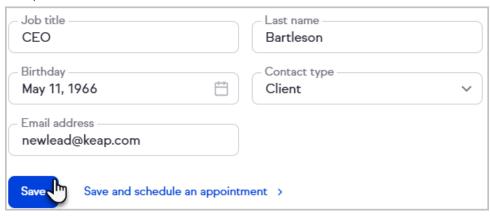
2. Click the + button at the top of your contacts list



3. Select the desired form

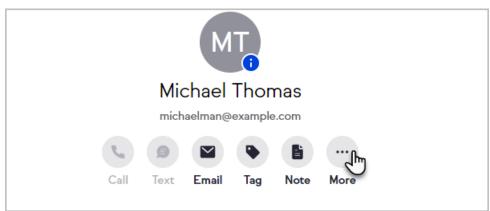


4. Complete the form and click **Save** 

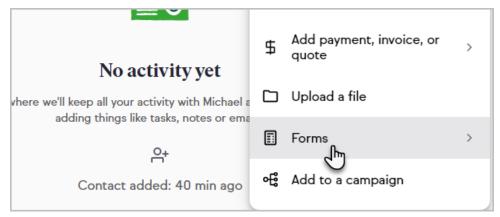


## Update an existing contact with an internal form

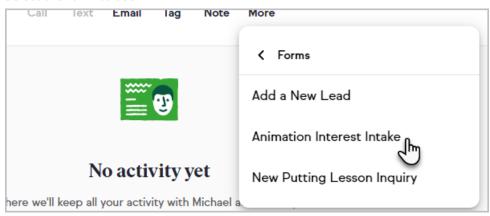
- 1. Navigate to a contact record
- 2. Click the More button



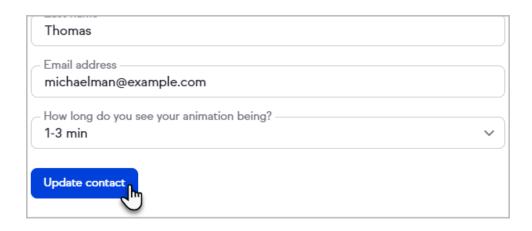
#### 3. Select Forms



4. Select the form to use



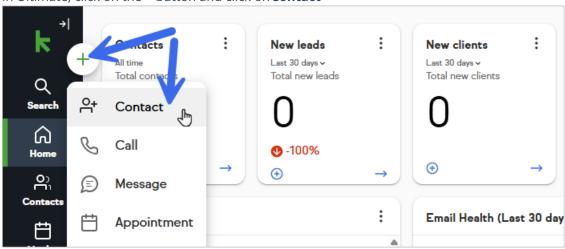
- 5. Complete the form
- 6. Click **Update contact**



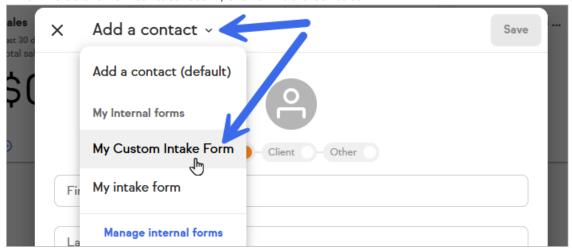
### **FAQs**

#### How can I add a contact using the new internal forms in Ultimate?

1. In Ultimate, click on the + button and click on **Contact** 



2. When inside the new contact record, click on Add a contact



3. You should see all your internal forms listed under My Internal forms

Can I update a contact in Ultimate using the new internal forms?

No, the Classic contact record only allows to create a contact using internal forms, not update it. This unctionality is available in the new contact record (Pro/Max) editions.					