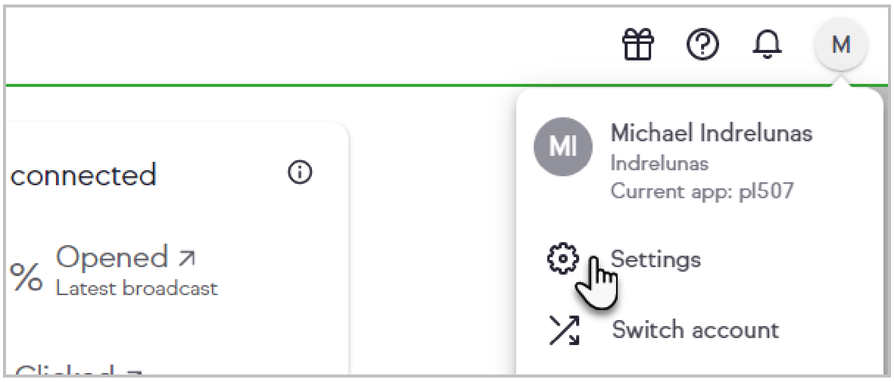
Internal forms

This article applies to:

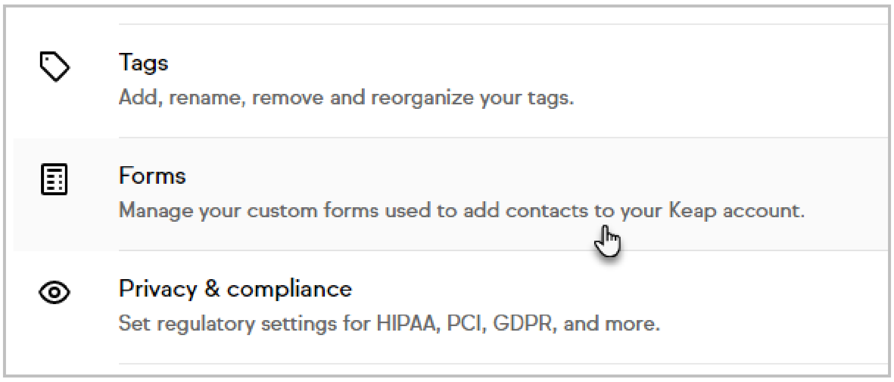
No two businesses are alike. With a custom internal form, you can add fields that are specific to your business process, allowing you to capture all the essential details when adding a new contact. Design your form with the right fields for accuracy and efficiency.

How to create an internal form

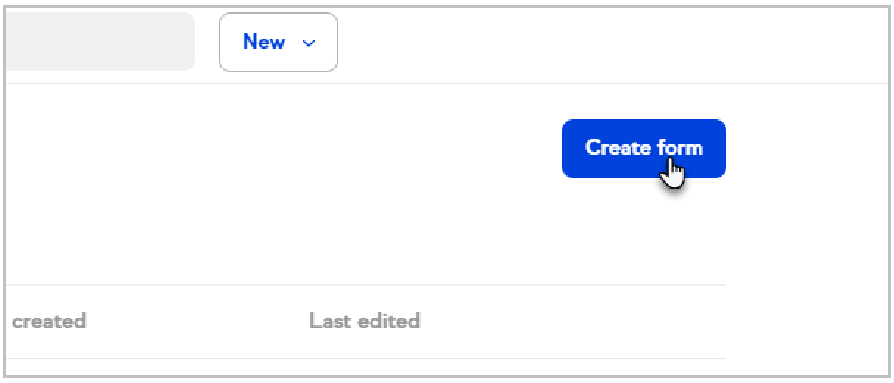
1. Navigate to **Settings**



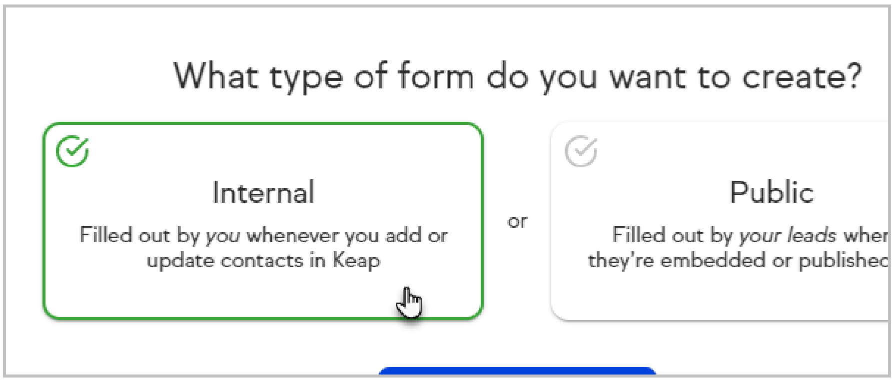
2. Click **Forms**



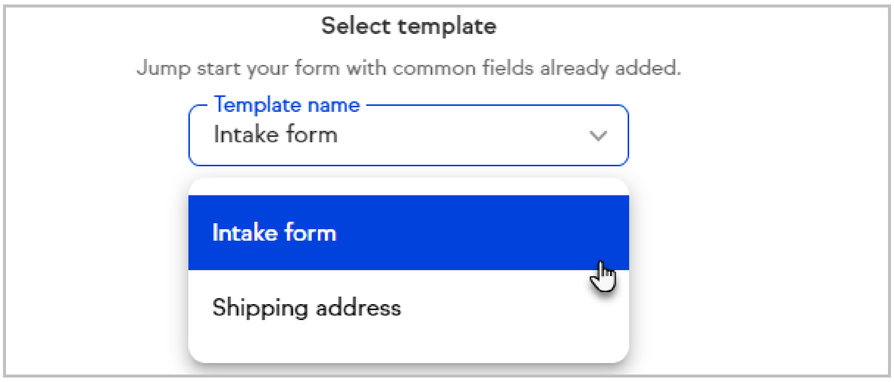
3. Click **Create form**



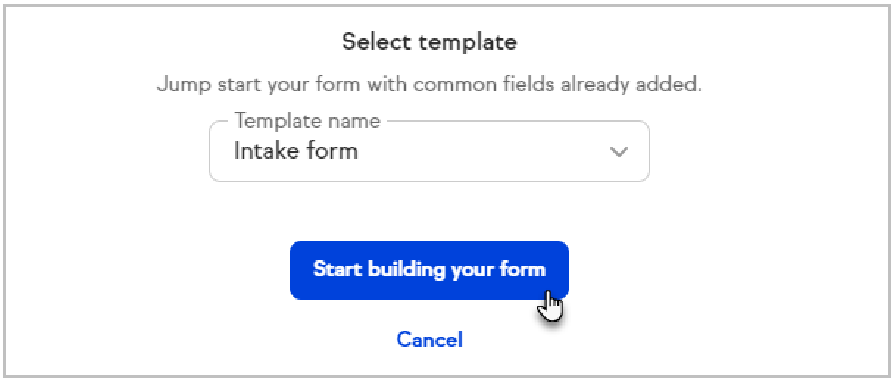
4. Select **Internal**



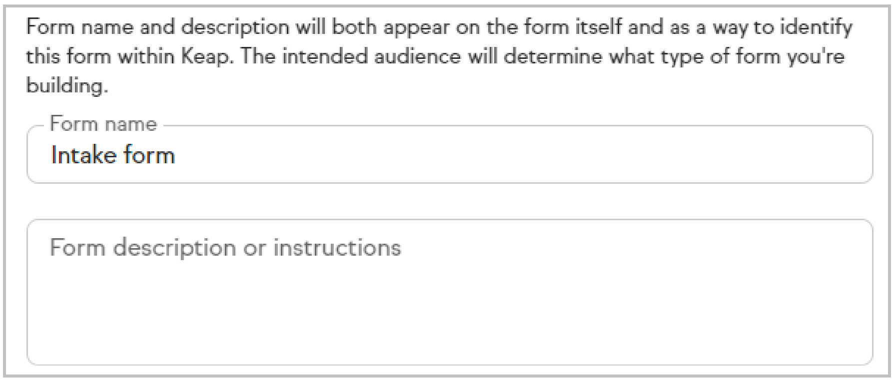
5. Select a template|



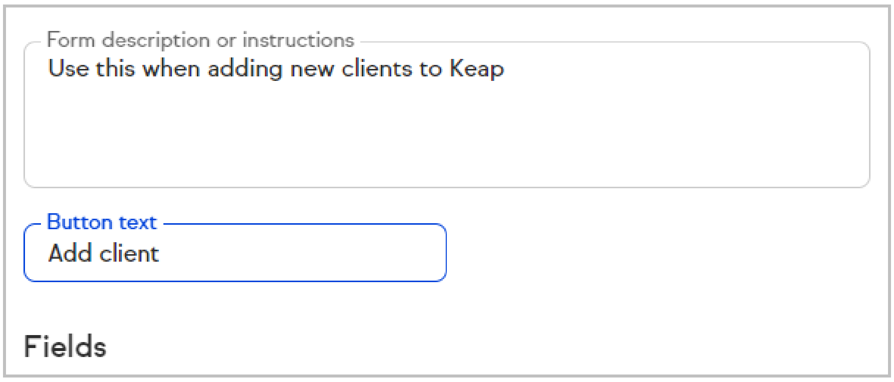
6. Click **Start building your form**



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



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

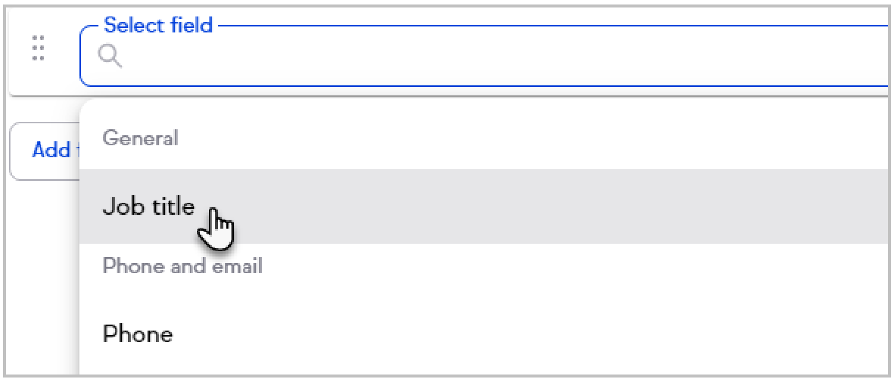


Add fields

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

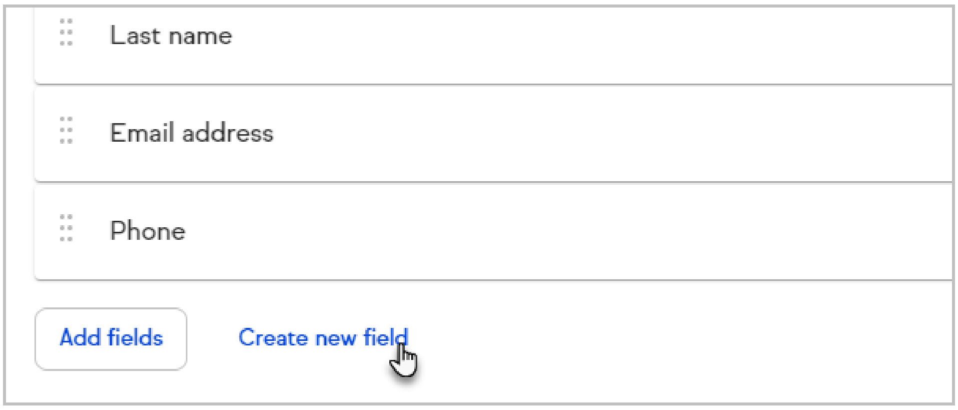
2. Select the desired field



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

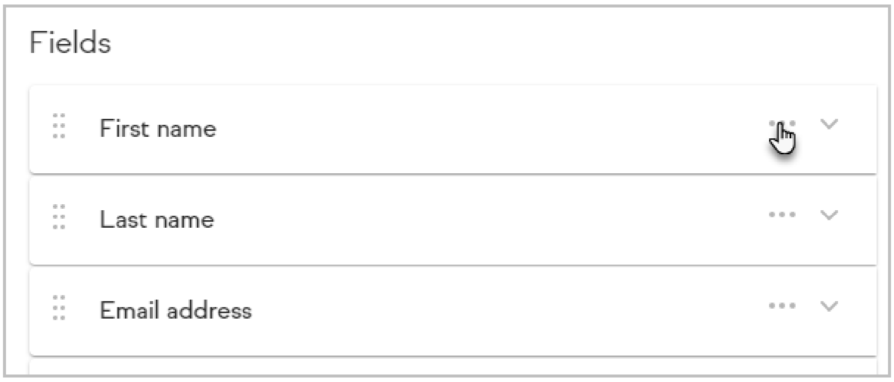
Create new custom fields

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.

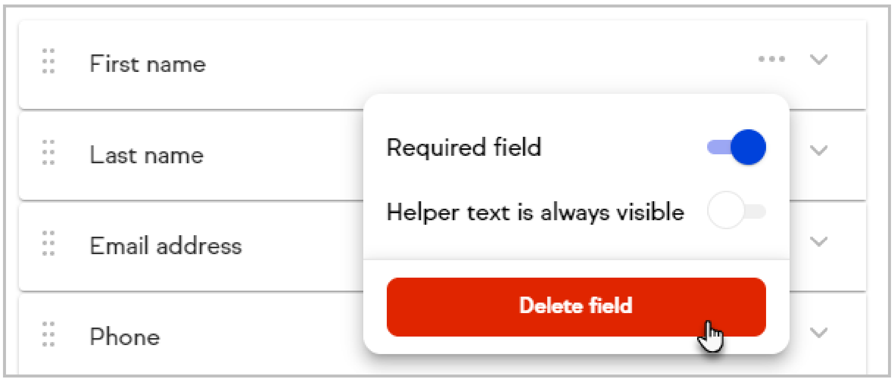


Delete fields

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



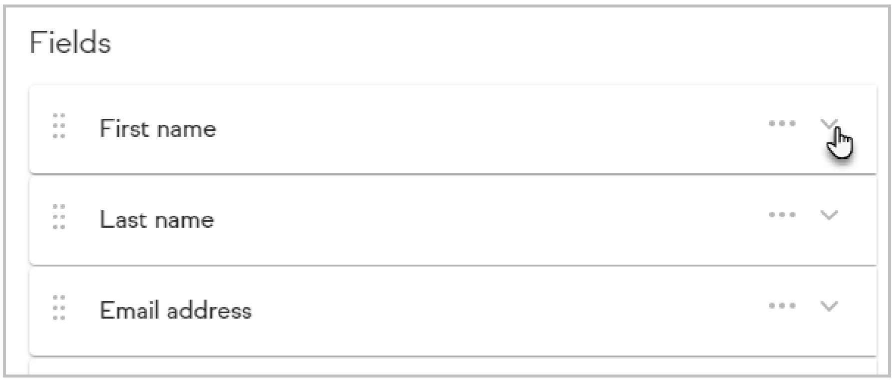
2. Click **Delete field**



Helper text

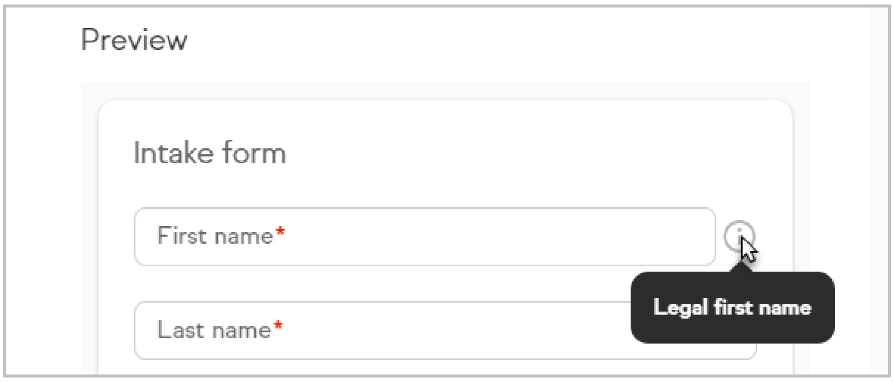
Helper text will be stored in an icon next to a field or underneath fields in your internal form and can serve as a reminder for what type of information should be gathered.

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



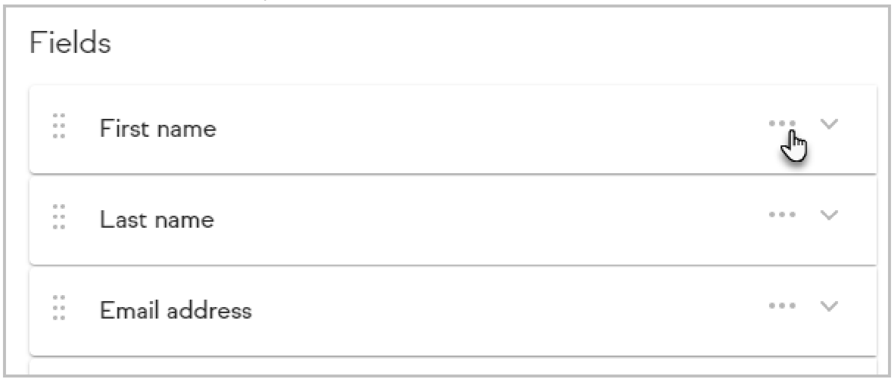
2. Enter your helper text in the field

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

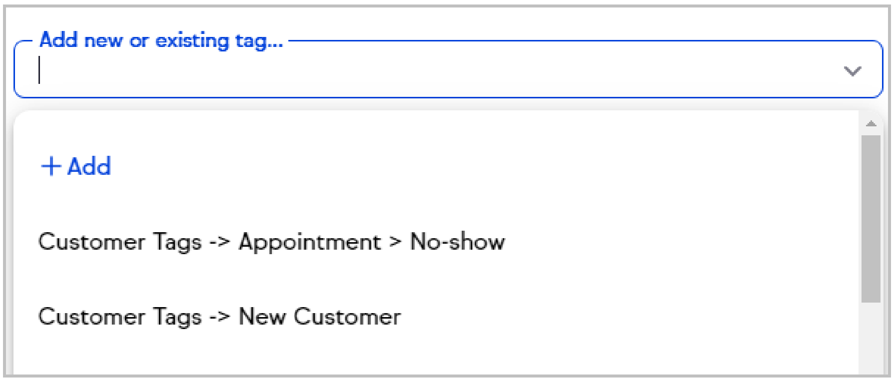
The helper text will always be provided beneath the field.

Internal fields

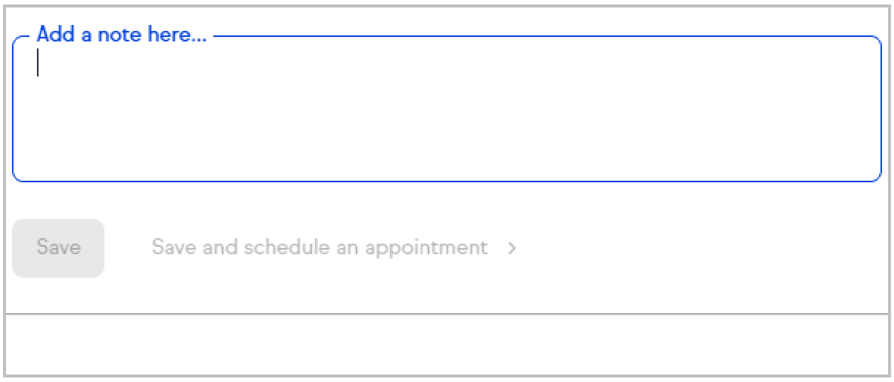
Internal forms can be used to add tags or notes to your contacts.

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

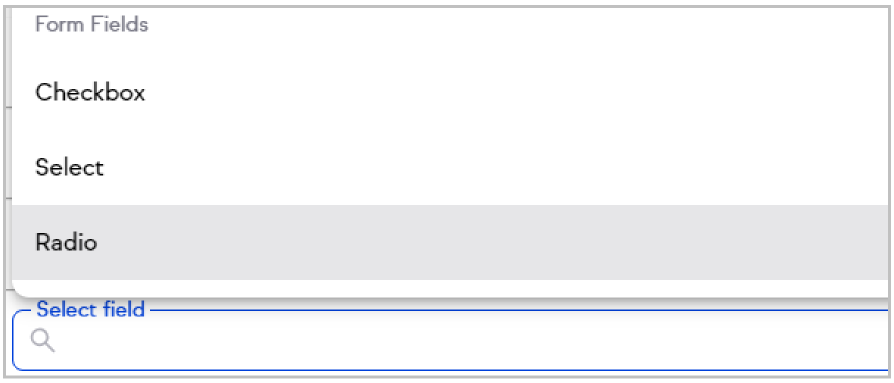


Form fields

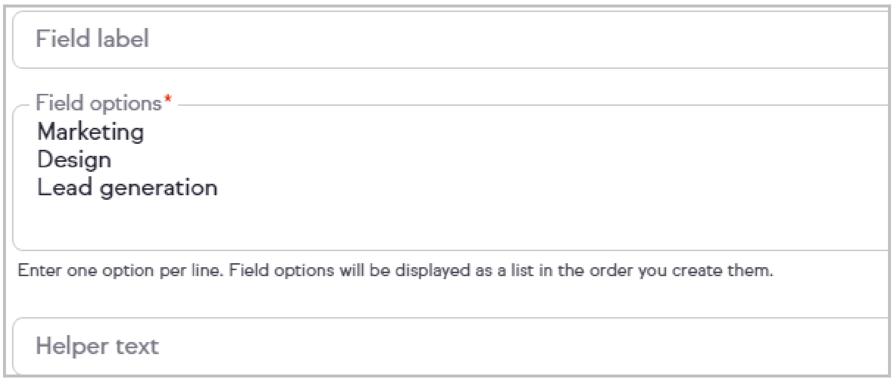
Form fields are only found on the internal form, and are **not** the custom fields listed on the contact record.

You can create unlimited form fields which can trigger automation in the advanced automation. Click here to see how!

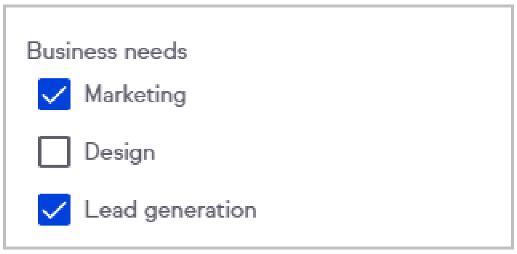
1. To add a form field to your internal form, scroll to the bottom of the add field menu to the **Form Fields** section



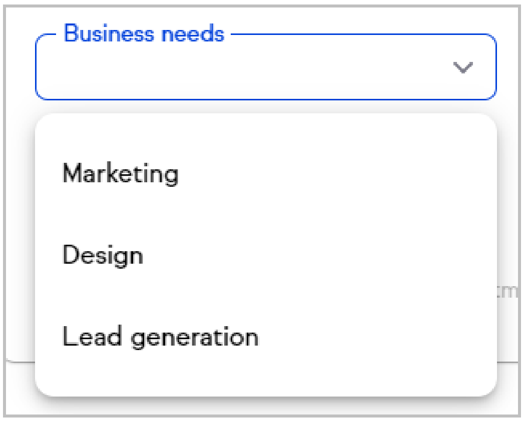
2. Select the desired type of form field
3. Enter each field option for the form field on a separate line



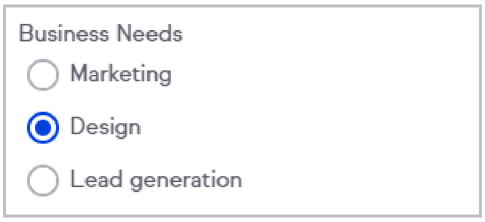
A **checkbox** form field allows for multiple selections



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

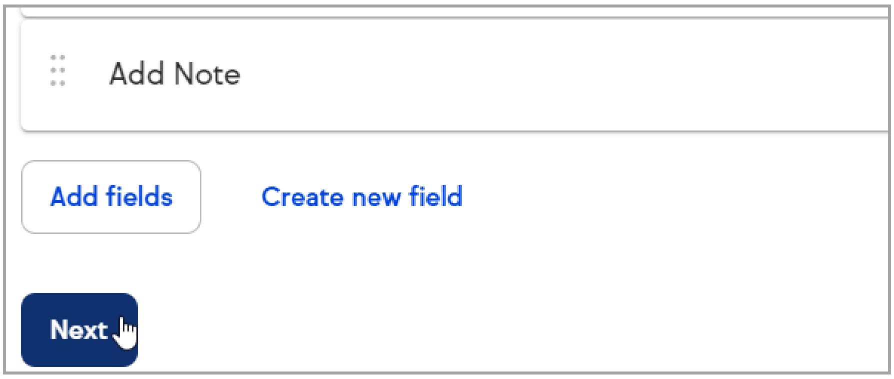


A **radio** form field allows only one selection

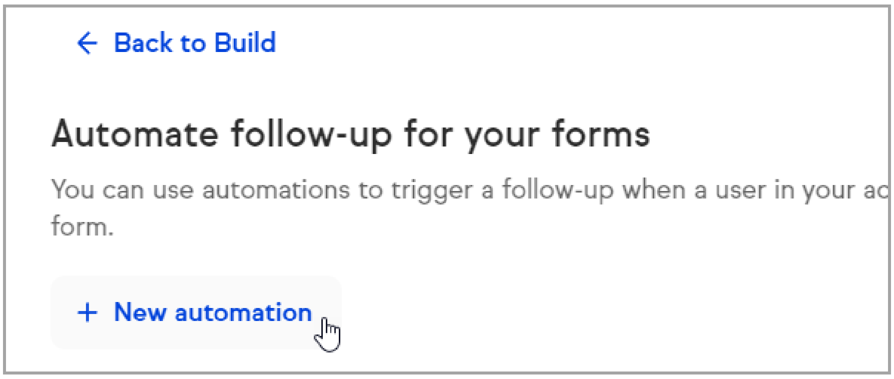


Automate your follow-up

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

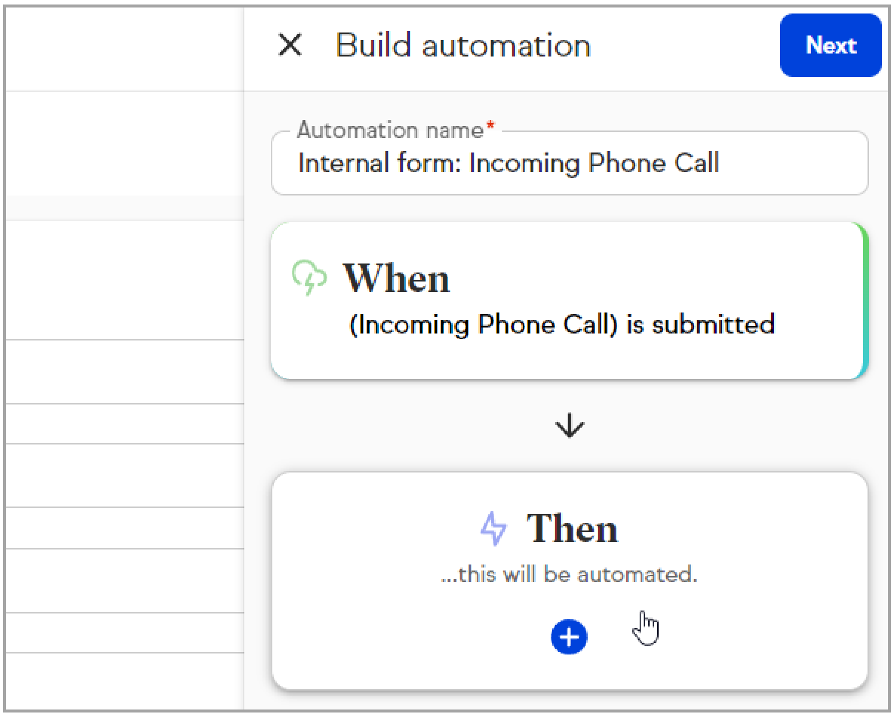


2. Click **New automation**

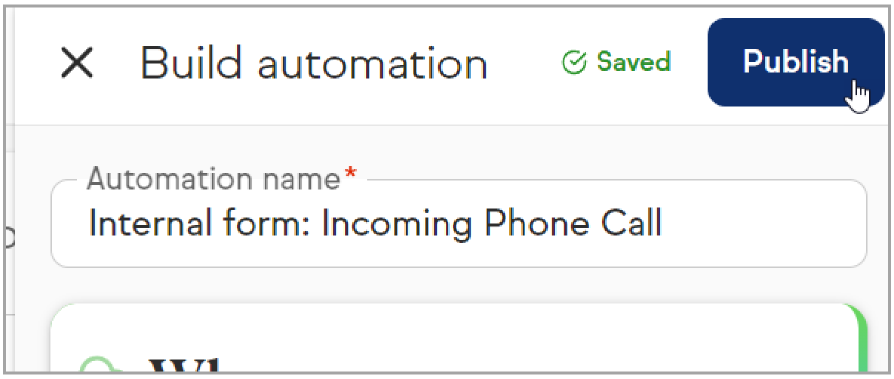


3. The Easy Automation builder will slide in from the right with a pre-named automation and the When already set

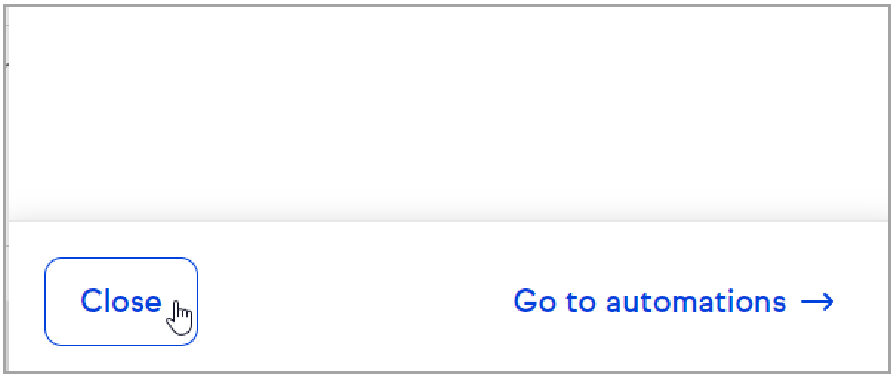
4. Click **Then** to create your easy automation



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



6. Click **Close**

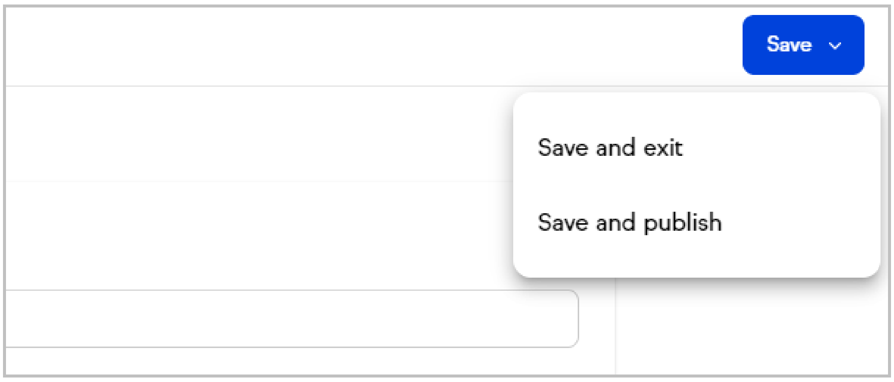


Publish your form

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**

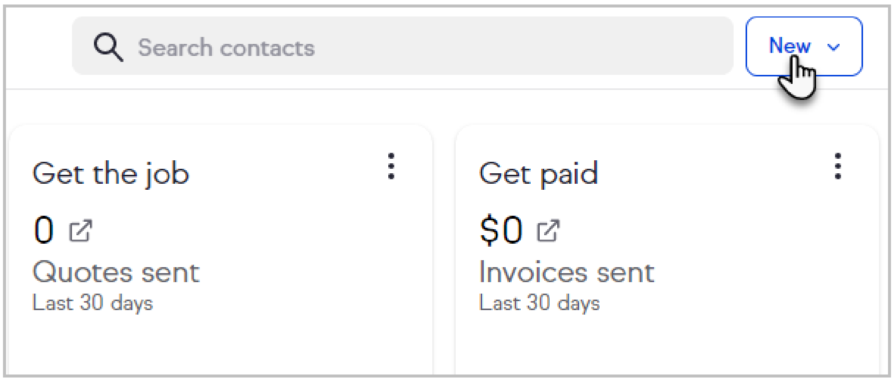


You may also click **Save and exit** if you want to stop working on your form without publishing it.

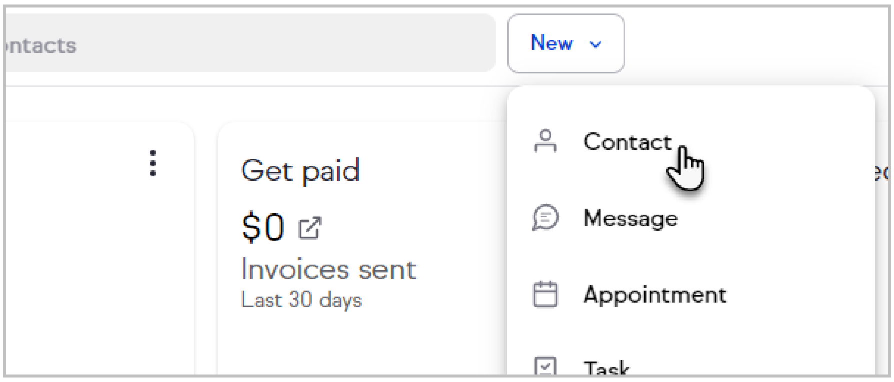
Add a new contact with your internal form

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

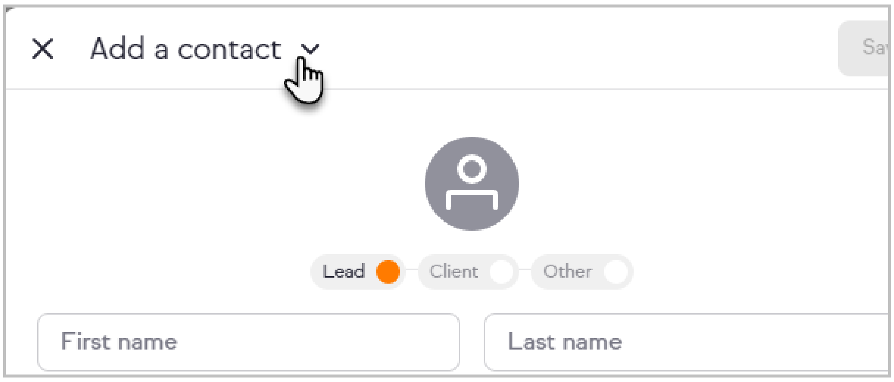
1. To use your internal form from any page in Keap, click the **New** button



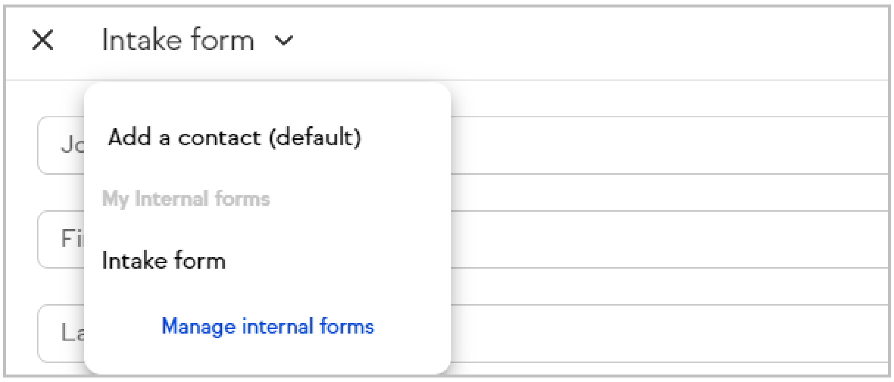
2. Click **Contact**



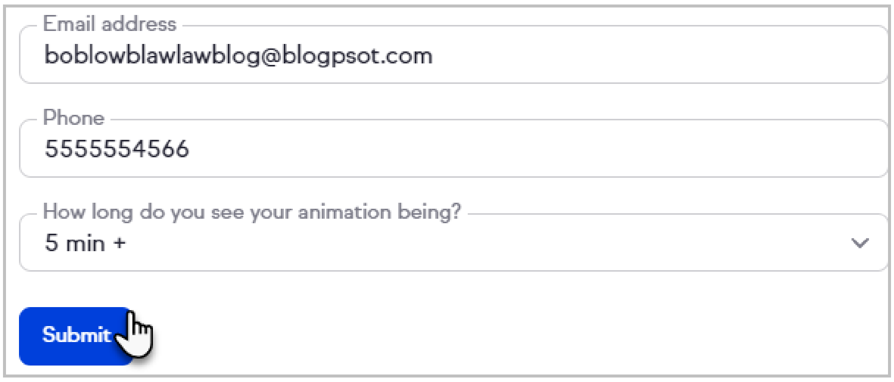
3. Click **Add a contact**



4. Select the internal form to use

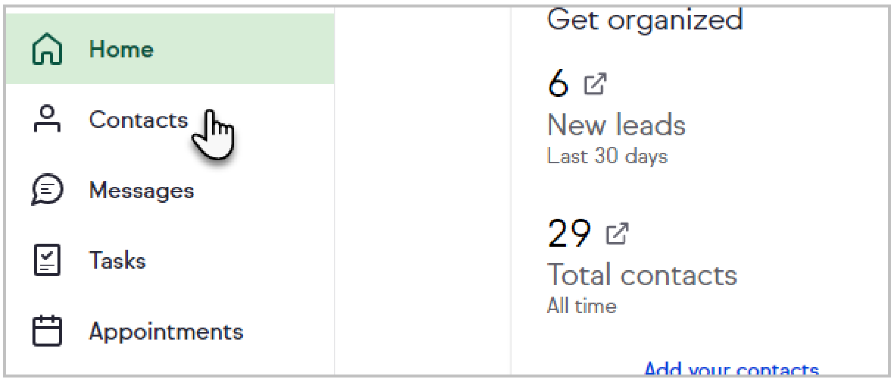


5. Complete and submit the form

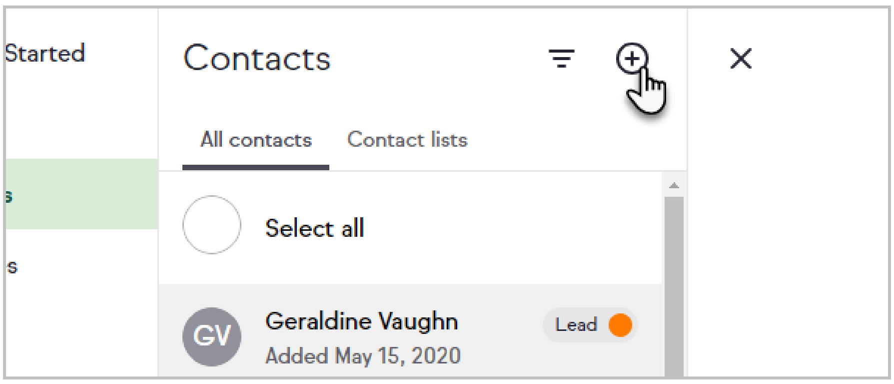


You can also access your internal form when viewing your contact lists.

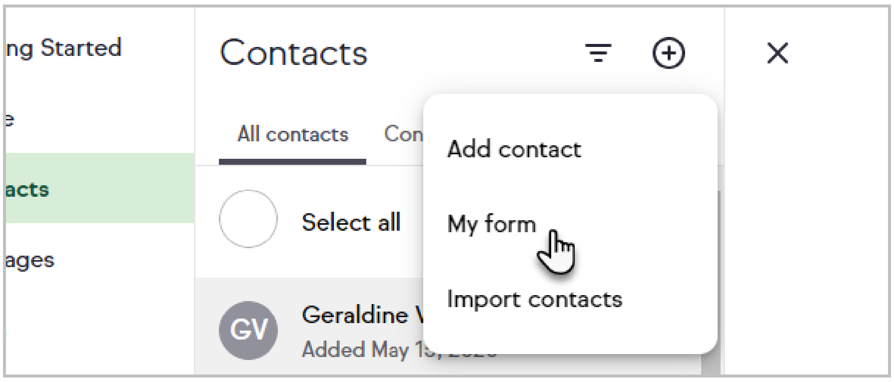
1. Navigate to the **Contacts** page



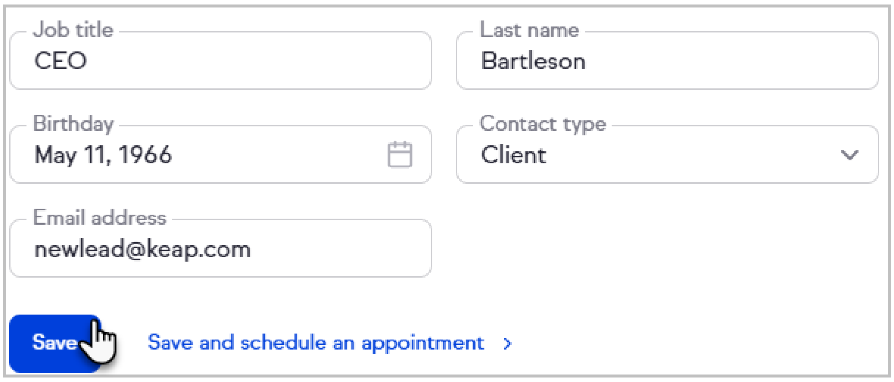
2. Click the + button at the top of your contacts list



3. Select the desired form

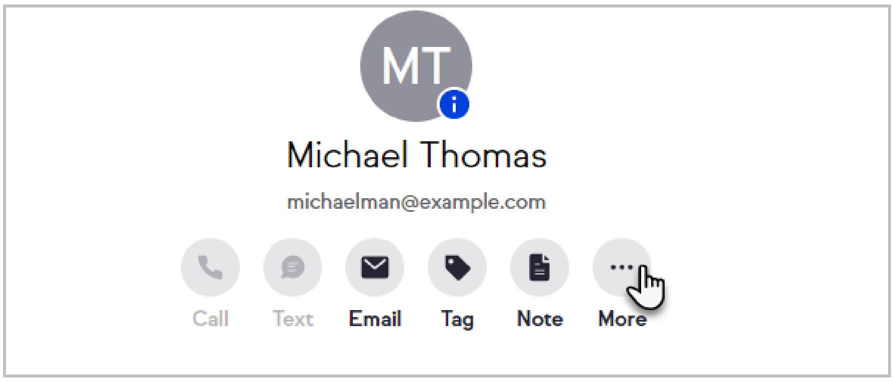


4. Complete the form and click **Save**

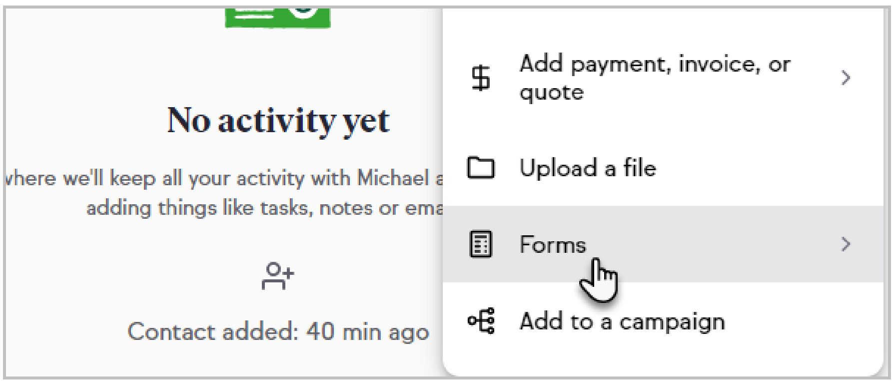


Update an existing contact with an internal form

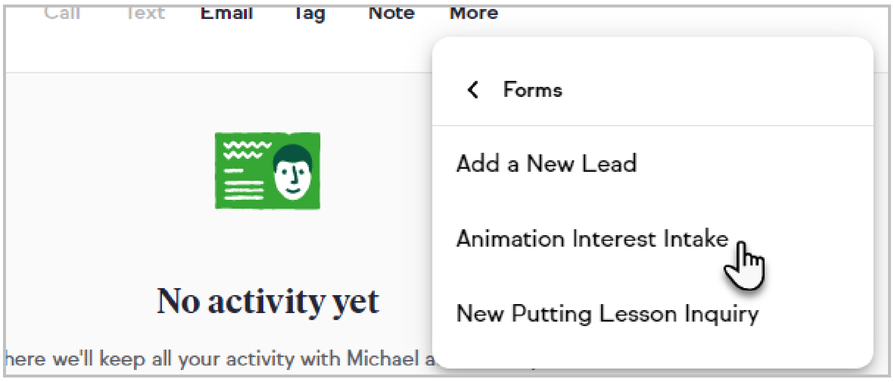
1. Navigate to a contact record
2. Click the **More** button



3. Select **Forms**



4. Select the form to use



5. Complete the form

6. Click **Update contact**