

Create a Web Form

This article applies to:

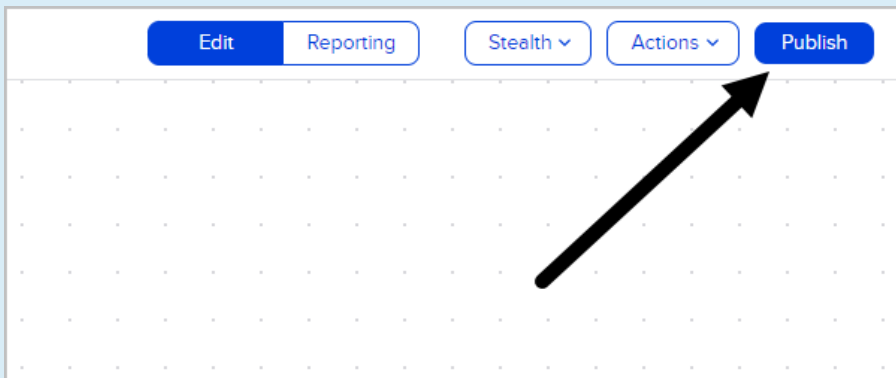
[Pro](#)

[Max](#)

A web form is an external form posted to collect information from potential customers who may visit your site. It is great for capturing a lead's contact information! Keap's web forms are mobile responsive, so your form looks professional whether your lead is visiting from a computer, tablet, or mobile device!

Pro-Tip!

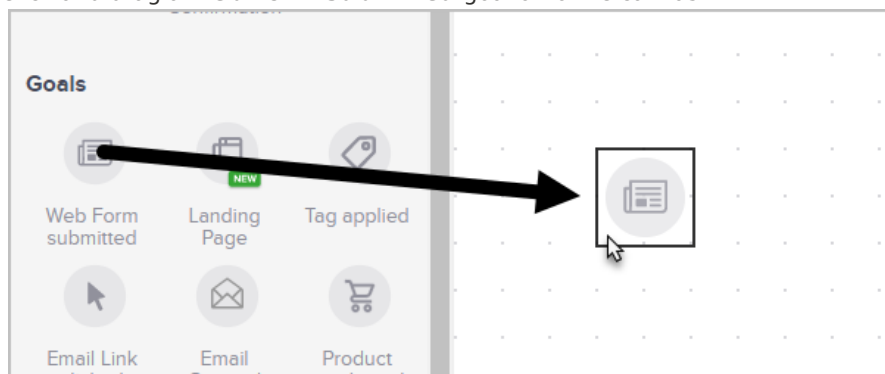
Whenever you make changes to a web form (or any other item) in a published automation, you need to re-publish the automation for your changes to go into effect. **Web forms are responsive.** This means that the web form will automatically scale to fit both desktop and mobile devices.



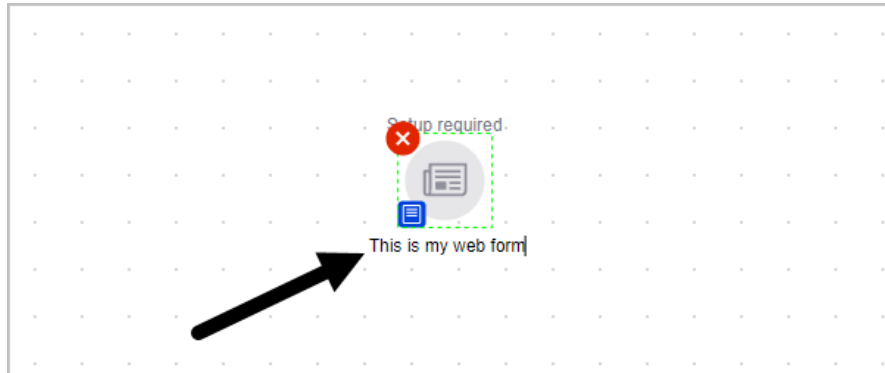
Note: Web forms published prior to February 26, 2020 are not responsive. They would need to be replaced with a new web form to become responsive (this is called the Advanced Automation Builder.)

Web forms embedded via HTML need to be republished in the Advanced Automation Builder and the embed code on your site needs to be updated. Web forms embedded via Javascript simply need to be republished in the Advanced Automation Builder and will update automatically.

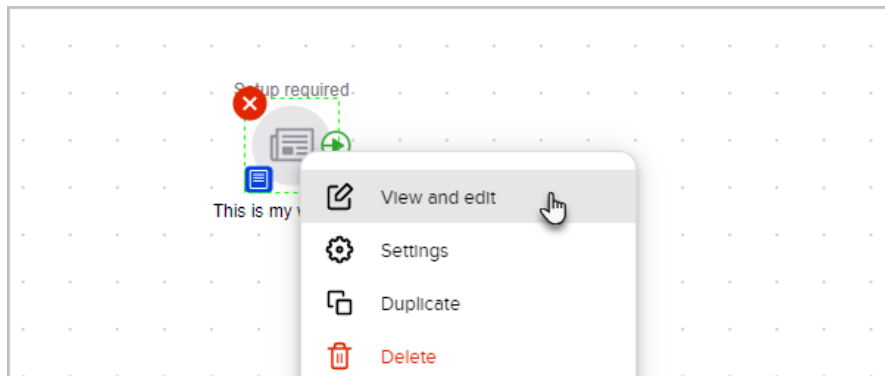
1. Click and drag a **Web Form Submitted** goal onto the canvas.



2. Double-click the name under the goal to change it to something more meaningful to you.

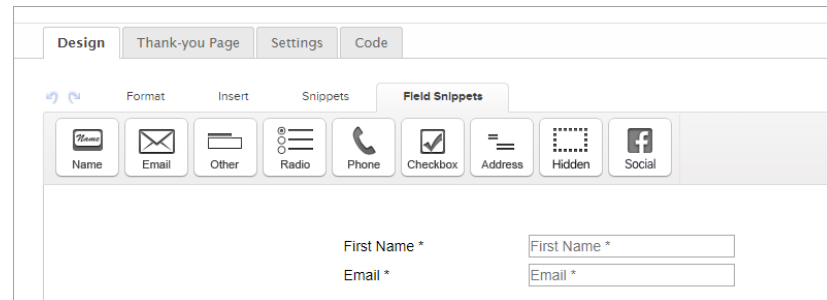


3. Now, **double-click the goal** to configure the web form (or single click and select **View and edit**)

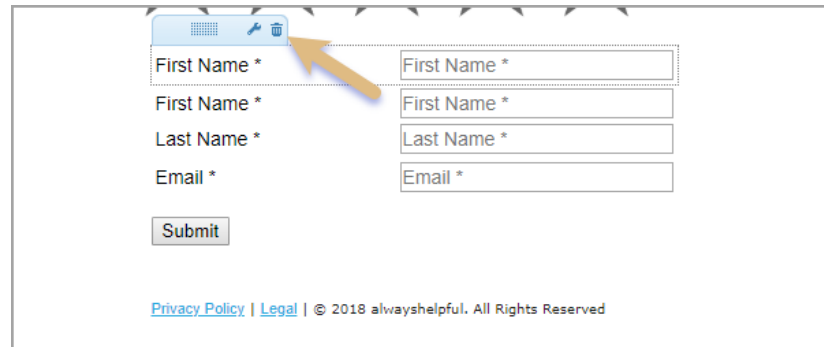


4. To access all of the available fields for a form, click the **Field Snippets** tab. Field Snippets contain:
- Name:** Captures the **Contact Name** field
 - Email:** Captures either **Email**, **Email 2**, **Email 3**, or **Create a Custom Field**
 - Other:** Captures all other fields including **Custom Fields** or you can create a **Custom Field**
 - Radio:** Create a list of options that will be stored in the contact record under **Forms Note**: This is not captured in a field.
 - Phone:** Capture phone number in **Phone Type 1-5** & **Fax 1-2**
 - Checkbox:** Create a single selection box to a multiple choice and captures in the contact record under **Forms Note**: This is not captured in a field.
 - Address** - Capture **Shipping**, **Billing Address**, or **Optional**
 - Hidden** - Add fields that will not display on the **Web Form** but will capture information based on setup
 - Partner** - Capture information to create a **Referral Partner Record**
 - Social** - Capture information about the contact's social handles which

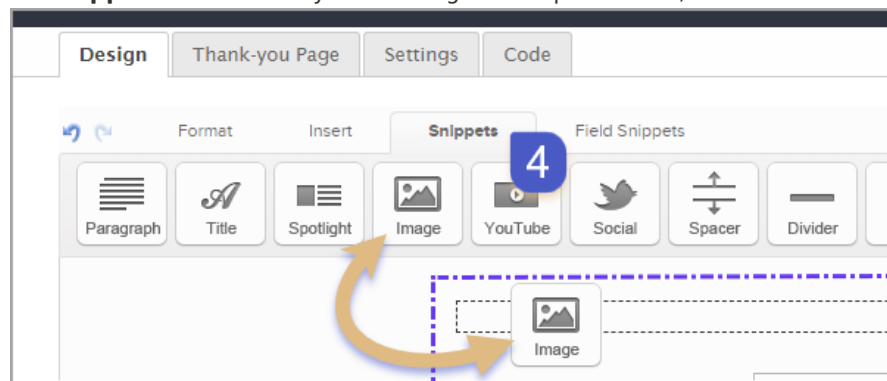
will save to the **Contact Record**



k. To delete a field, hover of **Field Snippet** and click the **trash can icon**.



5. The **Snippets** tab is where you can drag and drop elements, such as:

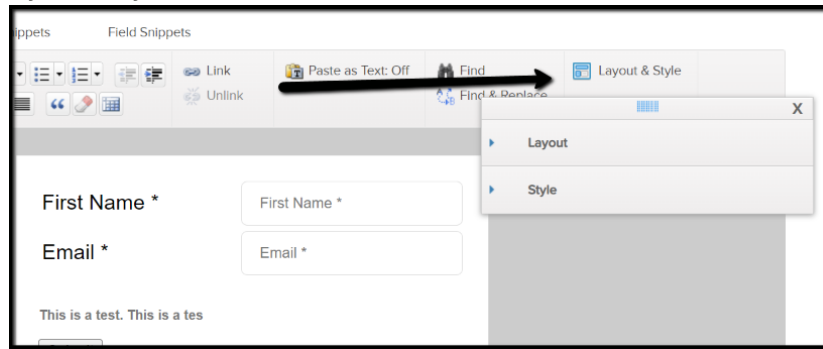


- a. **Paragraph** - Text box
- b. **Title** - Text box with large font and bold
- c. **Spotlight** - Image aligned left with Text box on the right
- d. **Image** - Place image before or after other snippets and then select or upload an image
- e. **YouTube** - Link to a YouTube video
- f. **Social** - Add Social Media Links
- g. **Spacer** - Add space between other snippets
- h. **Divider** - Adds bar between other snippets
- i. **HTML** - Add custom coding
- j. **Logo** - Automatically adds your logo that is saved under Admin > Branding Center > Logo
- k. Configure your field snippet and click **Save**.

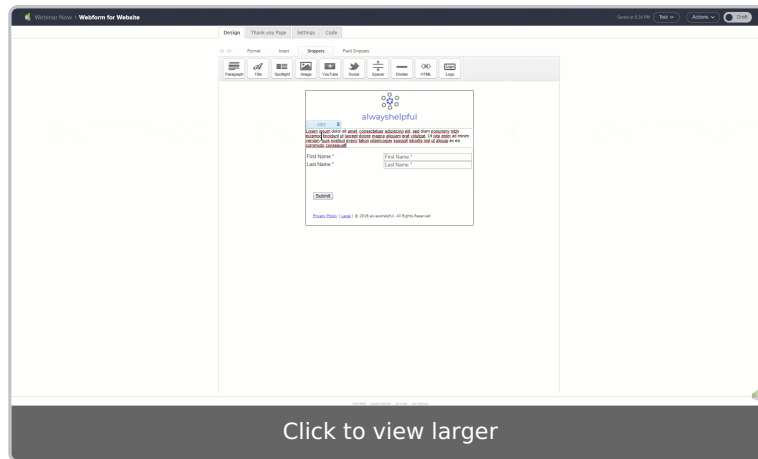
- I. To delete either type of snippets, hover over the item and click the trash can.



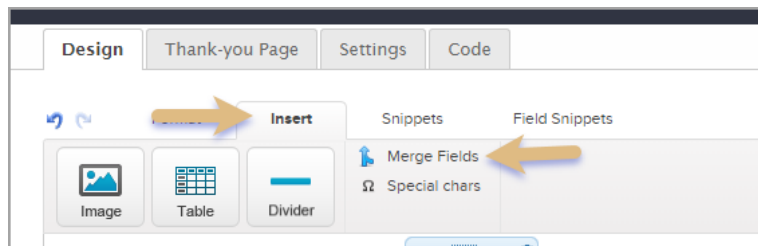
6. The **Format** tab to access all of the text formatting tools
 - a. Fonts - Format, Family, Font size, etc
 - b. Unordered and Numbered Lists
 - c. Alignment
 - d. Quote
 - e. Remove formatting
 - f. Table
 - g. Link
 - h. Paste text
 - i. Find & Find/Replace
 - j. Layout & Style



- k. **Insert** tab allows you to insert the following elements into either the Paragraph or Title Snippets
 - a. Image
 - b. Table
 - c. Divider
 - d. Merge Fields - A placeholder used to insert personalized content
For example, ~Contact.FirstName~ is a merge field that inserts the value stored in the First Name field of the contact record.



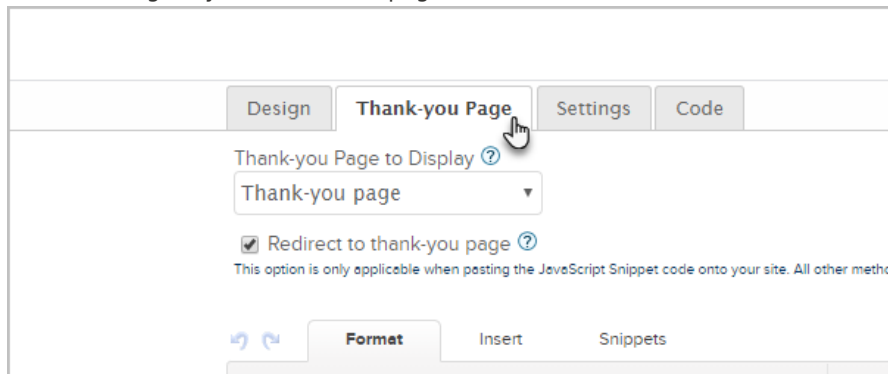
e. Special Characters



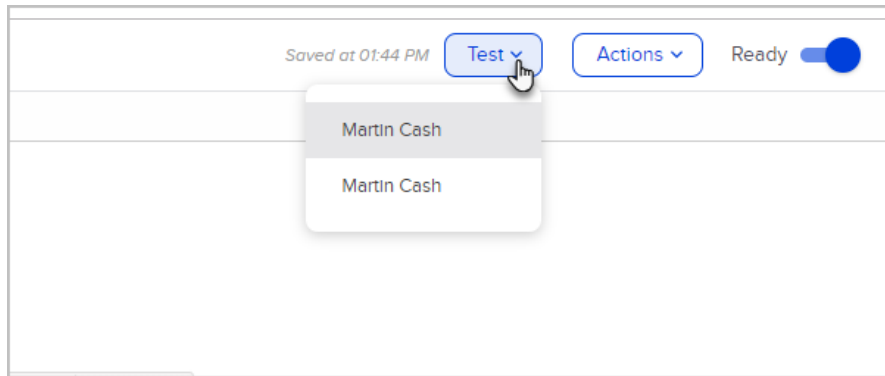
- I. Click on the **Layout & Style** button to configure the look of your web form.

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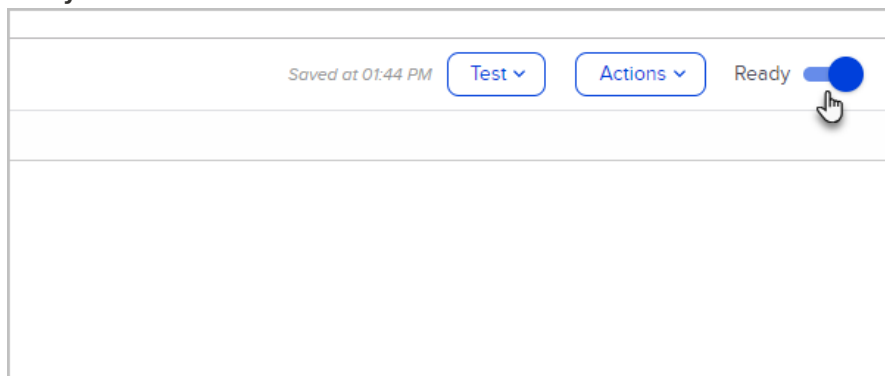
7. When you are finished designing your web form, click the **Thank-You page** tab and configure your Thank-You page.



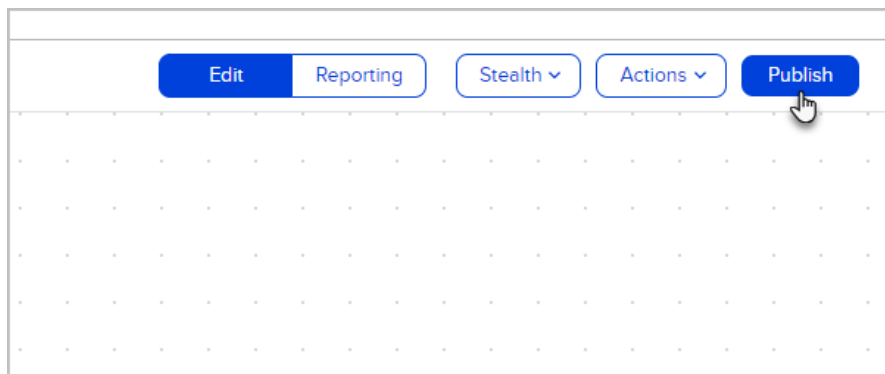
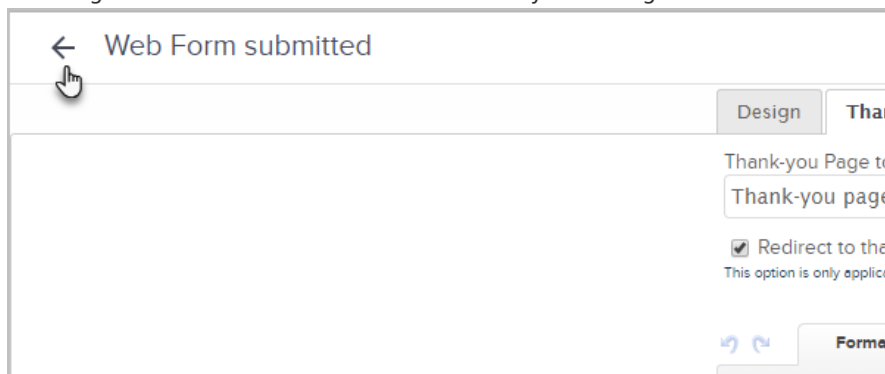
8. To test your form, just click the **Test** button and select a person.



9. Once you've tested your form and are happy with it, change it from **Draft** to **Ready**.

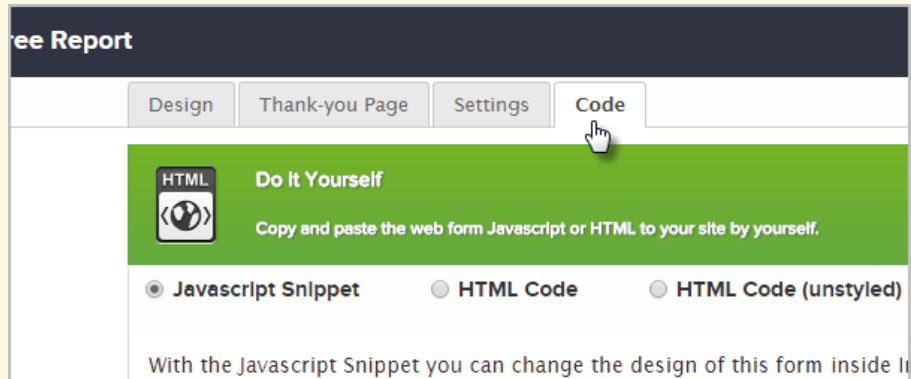


10. Click to go back to the automation and Publish your changes.



11. To grab the URL of the web form, or grab the code to place on your site, go back into the web form goal and click on the **Code** tab.

Important! Every time a web form is changed, the *javascript* and *hosted* version will automatically update. If the *HTML* or *HTML unstyled* code is used, then the web form code must be manually updated on your website in order for the changes to take effect.



The screenshot shows a configuration interface for a web form. At the top, there is a dark header with the text "ee Report". Below the header is a navigation bar with four tabs: "Design", "Thank-you Page", "Settings", and "Code". The "Code" tab is currently selected, and a mouse cursor is hovering over it. Below the navigation bar is a green banner with the text "Do It Yourself" and a sub-header "HTML". Below the banner, there are three radio button options: "Javascript Snippet" (which is selected), "HTML Code", and "HTML Code (unstyled)". Below these options, there is a line of text that reads "With the Javascript Snippet you can change the design of this form inside I".