



How-to-instructions on creating a form

Forms are the main way that SharpSpring receives information regarding a potential lead. This information can then be used to send an email to the lead, which begins the lead nurturing process.

The Forms page evaluates the performance of all of your forms. The data is organized in both a chart and table format, while also enabling you to export the data to a .CSV file.

The Forms page is the primary gateway to all form information in SharpSpring.

To access the Form Insights page, click
Content > Forms in SharpSpring's top toolbar.







By default, the Forms page displays all form submissions over the previous 60-day period.

The Forms page is split into two distinct sections: Submissions and List. Each section deals with forms and leads in different ways.

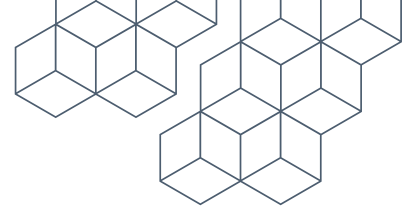
Understanding Form Submissions

The Forms page features a chart that displays form submission metrics. It shows the Forms Submissions chart, which displays information on all of your forms over a given period of time. This chart is a quick indication of how your forms are doing. In addition, the chart displays the total number of unique leads and the total number of times that your forms were submitted.






Once configured, this chart can be printed or saved. To view, configure, and save this chart, do the following:

- 1 In SharpSpring's top toolbar, click Content > Forms.
- 2 In the Form Submissions chart, select one of the following chart types:
 -  statistics.png Line chart
 -  graph.png Bar chart
 -  bars.png Area chart
- 3 Select one of the following time parameters:
 -  Day
 -  Week
 -  Month





- 4 Click the Date Range drop-down menu.
- 5 Select the desired date range.
- 6 Click menu.png Menu.
- 7 Select one of the following:

-  Print chart
-  Download .PNG image
-  Download .JPEG image
-  Download .PDF document
-  Download .SVG vector image

Understanding Submission Details

The Form Submissions chart displays information on all of your forms. However, you may want to see how individual forms are performing. You can view a breakdown of form details and view performance on a form-by-form basis.




While viewing the main Forms page, click View Submission Details to open the Form Submission Details page.

The Form Submission Details chart, much like the main Form Submissions chart, details information about your forms over a given period of time. However, it differs in that it provides a breakdown of those leads who have filled out your forms.

By default, the table will show all leads who have submitted any form over the previous 60-day period. Narrowing the display parameters by selecting specific forms will show the leads who filled out those forms.

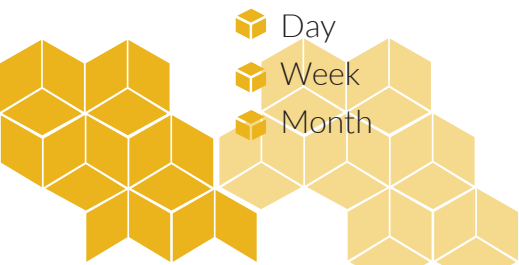
Like the main Form Submissions chart, the Form Submission Details chart can be configured to show submission data over a given period of time. That data can then be saved for further use. To configure and save information in the Form Submission Details chart, do the following:

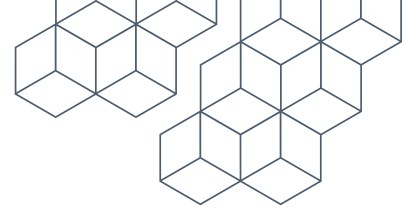
- 1 In SharpSpring's top toolbar, click Content > Forms.
- 2 Select forms as desired from the Select a Form drop-down menu. Click Apply.
- 3 Select one of the following chart types:

-  statistics.png Line chart
-  graph.png Bar chart
-  bars.png Area chart






- 4 Select one of the following time parameters:

-  Day
-  Week
-  Month











- 5 Click the Date Range drop-down menu.
- 6 Select the desired date range.
- 7 Click Menu. Select one of the following:

-  Print chart
-  Download .PNG image
-  Download .JPEG image
-  Download .PDF document
-  Download .SVG vector image

Once configured, the Form Submission Details page will display a table of leads who submitted the selected form or forms over a given period of time. The table includes the following information:

-  Leads' names
-  Submitted form names
-  Time since forms were submitted
-  Leads' phone numbers
-  Leads' email addresses
-  Lead scores

Clicking a lead's name will open that lead's individual record. Clicking a form's name will open that individual form.

Editing Leads in Form Submissions

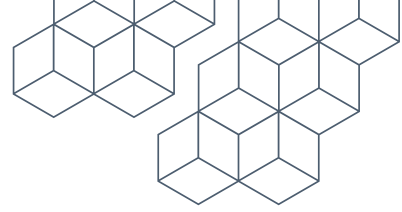
The Form Submission Details page provides you with a way to quickly edit lead information in a lead's individual record. To edit lead information, do the following:

- 1 In SharpSpring's top toolbar, click Content > Forms.
- 2 Click the Submissions tab.
- 3 Locate the desired lead.
- 4 Next to the lead's Lead Score, click Options > Edit.
- 5 Modify the lead's profile in the Contact Manager.
- 6 Click Save Changes.

Deleting Leads in Form Submissions

The Form Submission Details page provides you with a way to remove lead records from your system. To delete leads, do the following:










- 1 In SharpSpring's top toolbar, click Content > Forms.
- 2 Click the Submissions tab.
- 3 Locate the desired lead.
- 4 Next to the lead's Lead Score, click Options > Delete.
- 5 In the modal window that appears, type Delete.
- 6 Optionally, click the This lead has requested to be deleted from the system checkbox.
- 7 Click Delete Lead.





Understanding the Form List

The Form List table provides an overview of how forms are performing. By default, all forms are displayed. Displayed forms can be filtered by name, activity, or type. Forms can be viewed individually or as a group. To filter forms in the Form List table, do the following:

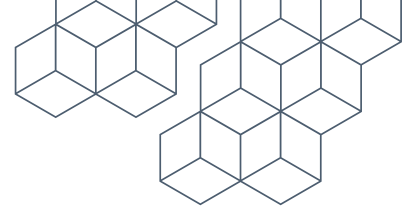
- 1 In SharpSpring's top toolbar, click Content > Forms.
- 2 Scroll to the Form List table.
- 3 Optionally enter the desired form name in the Filter Forms field.
- 4 Optionally, select either of the following from the Active Forms drop-down menu:
 -  Active Forms
 -  Inactive Forms
- 5 Optionally, select one of the following from the Form Types drop-down menu:
 -  All Forms
 -  SharpSpring Forms
 -  Third-Party Forms
- 6 Optionally, click a column title to sort available forms in ascending or descending order.

The Form List table provides information for all active and inactive forms. It provides a more direct, text-based display of form submission data.

The Form List table shows the following information for forms:

-  Form names
-  Form types
-  Total form submissions
-  Time since forms were last submitted





Managing Forms in the Form List

In addition to information on individual forms, the Forms List provides different actions for deactivating, viewing, embedding, or directly modifying a form. To manage forms, do the following:

- 1 In SharpSpring's top toolbar, click Content > Forms.
- 2 Scroll to the Form List table.
- 3 Locate the desired form.
- 4 Next to the form's Last Active date, Click Actions.
- 5 Select one of the following:

Option	
Embed Code	Opens form embed code parameters.
Edit Form	Directly modify the form.
Preview Form	Previews the form in a new browser tab.
View Submissions	Previews the form in a new browser tab.
Deactivate Form/ Reactivate Form	Deactivates or reactivates the form, depending on activity status.

Exporting Form Data

Form and lead data can be exported and downloaded for future reference. This can be done throughout the Forms page.

Exporting from the Forms Page

To export form and lead data from the Forms page, do the following:

- 1 In SharpSpring's top toolbar, clickContent > Forms.
- 2 Configure date parameters.
- 3 Click Actions > Export Lead Submissions.
- 4 Click the Form Leads export file in the Export Manager.





Exporting from Form Submission Details

To export form and lead data from the Form Submission Details page, do the following:

- 1 In SharpSpring's top toolbar, click Content > Forms.
- 2 Click View Submission Details.
- 3 Select forms as desired.
- 4 Configure date parameters.
- 5 Click Export.
- 6 Click the Export Manager link that appears.
- 7 Click the Forms Leads export file.

