Getting started with routing forms

There's so much you can do with forms, but here's a quick rundown of the most important things you should know as you're getting started. This guide shows you the main steps needed to take forms live on your website.

How forms work

The main purpose of forms is to engage with visitors on your website through a form, asking questions that qualify them to schedule meetings with your team or chat with them further.

After filling out a form, their answers determine whether they're offered a time to schedule with your team or the opportunity to chat live with them.

We understand that personalization leads to better engagement in your visitors' website experience. You can create a different form for each experience your visitors may have, according to their needs and your business objectives. You can also create one form with multiple paths, taking your visitors through the best interactions for them with conditional routing.

This allows you to customize their experience seamlessly, providing the most effective messaging for that specific audience under the given circumstances. It also raises the likelihood of identifying the right prospects for your team to engage with as high-quality leads.

Step 1: Create your form

You can create as many forms as you like for different pages on your website.

You can access your form builder by going to Forms on the left **→ Create form** button.

Start from scratch: You'll start building your form with a blank canvas.

Use a template: Choose from one of our many, ready-made templates. The correct template saves time by providing an example form you'll adjust according to preference.

Duplicate an existing form: If an already-existing form is similar to what you're wanting, you can duplicate that form and tweak it to suit your preferences. Click the three dots on the right-hand side of that specific form and select **Duplicate**.

Learn more about building a form

Step 2: Build your form

Build a form

Drag and drop interactions into the form's column in the order you prefer.

You have many interaction options for your form, allowing you to:

- Ask questions to qualify visitors
- Send follow-up questions depending on their answer, to personalize the experience further
- Offer scheduling to qualified visitors, based on their answers

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Routing your interactions

You can route your interactions by choosing conditions and deciding which interaction they should see next.

You can get really specific about the routing logic you want. The logic can depend on how your visitor answers the current question or a previous one. You can also base the logic on a contact field OnceHub already saved to their contact record (for instance, the **Company size** field).

Learn more about routing your interactions

Offer scheduling with your form

Your form can identify the people your team should speak to further and offer scheduling to them. Once they qualify, route them to a Schedule interaction.

The entire scheduling experience takes place as they fill out the form.

You can add scheduling from the **Actions** tab.

Offer live chat with your form

Your form can identify the people your team should speak to further and offer live chat to them. Once they qualify, route them to a Live chat interaction.

The entire live chat experience takes place as they fill out the form.

You can add live chat from the **Actions** tab.

Choose your design color

You can match your form's color to your website or your organization's branding.

Step 3: Configure assignment for your team

In the **Assign** tab, you can assign new contacts to team members. This means they'll be the owner of that contact in their Activity stream.

If an admin has allowed member users to create and manage forms, members will be able to see any chatbots an admin assigned to them. Turn this permission on or off by selecting the gear icon in the top right corner **→ Settings and permissions → Member permissions**.

1) Assign to a specific team member. If you select multiple people, they'll be assigned the contact based on round robin distribution.

2) If you offer scheduling, you can assign the contact to the team member who received the booking.

Step 4: Preview your form

To see a preview, click on the eye icon at any time as you're building your form. You can preview everything as your audience would experience it.

Step 5: Publish and share the form

Publish your form

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Once you're happy with your interactions and routing, you can publish your form by toggling it on.

Share your form

Select the **Share** tab.

1. Share as a link

You can share your form as a standalone page which requires no website. Simply copy the link and send it to whomever you like.

2. Share as a page

You can create a standalone page and add a form to it. This option allows complete customization of your form so that you can match it to your branding. Once you have customized the page, you can simply click on **Get page URL** at the bottom of the screen.

3. Embed on your website

Embedding your form allows you to change the color of your form. **Get the code** at the bottom right of the screen. You can paste the embed code in the admin area of your site, on whichever page(s) you'd like the form to appear.

More resources to help with forms

1. Browse the forms articles: For those who like to read everything. ;)
2. Check out our blog posts on forms: Go in-depth on popular scenarios
3. Hire professional services: Our expert team members can help you configure everything quickly and correctly.

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