Forms Guide: Setup and Troubleshooting

Convertri uses an *Atomic Forms* system, which means forms are built of individual components rather than a single form block.

This means you've got a lot more flexibility than you have with most page-builder systems – but on the flip side, they can take a bit more wiring up.

This walkthrough will take you through setting up a form – but in case you're just here to troubleshoot, here's the two most common reasons your form may not be submitting your data.

1. **You've added a link on the submit button.** If you do this, the link will override the submit function. You can tell Convertri where to send people after they've submitted the form using the Post-Submission Redirect Feature in the Form and Product dialogs.
2. **You've not assigned types to the text inputs in your form,** so Convertri doesn't know which field in your autoresponder to send the data to.

You'll see how to fix both of these in this guide.

Now: building a form, soup to nuts.

All the component parts for building your form can be found in the form elements menu in the elements bar.
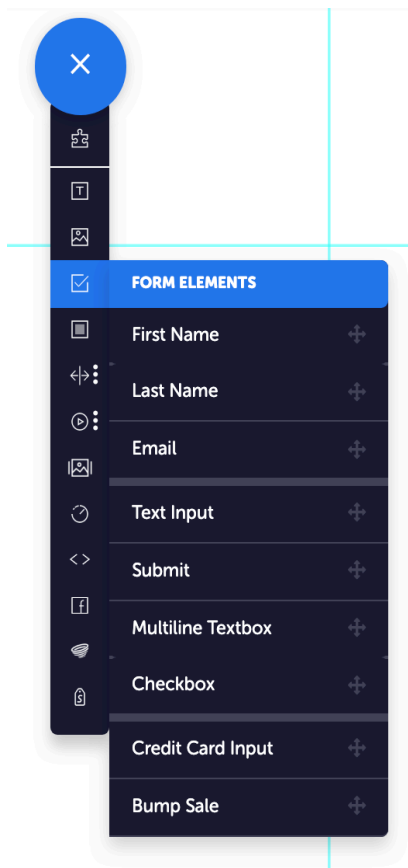

- **First Name:** a text input for first names.
- **Last Name:** a text input for last names.
- **Email:** a text input for email addresses. You can use validation to make sure it's a real-looking email.
- **Text Input:** This is for any input where you want your prospect to enter any other simple bit of information. It works just like the First Name, Last Name and E-mail fields, except you'll need to tell Convertri which field of your autoresponder to submit to (see page 7)
- **Submit:** Add a button to submit the form. This will work for both optin and checkout.
- **Multiline Textbox:** a text box for larger paragraphs.

- **Checkbox:** A box that your users can tick. You can use this for ensuring your prospects, for example, have read your T&Cs before being allowed to submit the form.
- **Credit Card Input:** This element has multiple fields for entering payment information.
- **Bump Sale:** This element will add a checkbox configured for making a bump sale. You can attach a product to this checkbox and it'll be added to the order if the box is ticked. Without a product attached, it'll act just like a normal checkbox.

To create your form, you can just drag on the components you want and a submit button. So for a basic form with Name and E-mail fields, drag on a First Name field, an E-mail field, and a submit button on to your page.

You can change the placeholder text in the input (or remove it entirely) in the 'Input Properties' section of the Properties Panel.
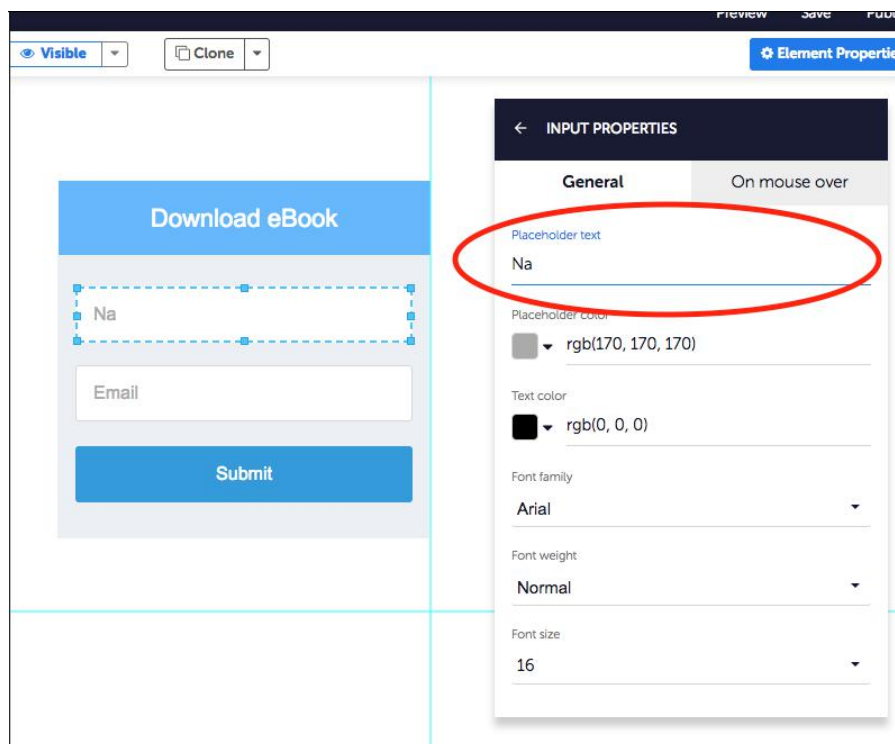


Now we need to wire the form up.

First of all, an autoresponder needs to be attached to the page. This is where your data will be submitted.

Note that the following explanation describes how to connect a form to your page using one of our API integrations.

You can also use HTML form integration, for any services that we don't currently provide an API integration for. You can see how to connect a form using HTML in the *HTML Form Integration* section of this guide.

API Form Integration

So to do this, select the autoresponder you want to use, and then choose the list you want to add the data to.
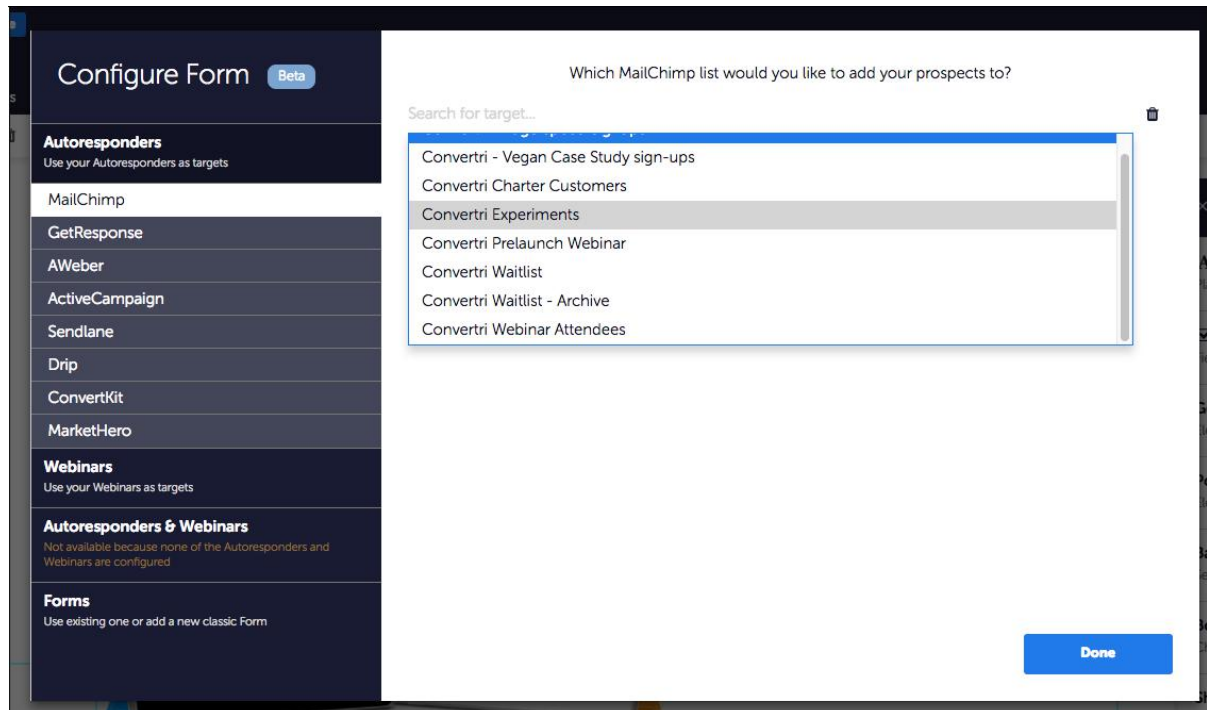
(If you haven't yet set up your autoresponder integrations, there's some guides on how to do that here: **http://help.convertri.com/category/7-forms-and-services**)

You'll now see a list of **fields,** and for some of them you'll need to select a **type**.

The fields are taken from the available fields in your autoresponder list. These will be set up in whatever autoresponder you're using. If you add a field to the list, it'll appear here in Convertri.

The type lets Convertri know where to look to find the information to add to this field. So in this example:

This is telling Convertri: *to find the information for the First Name field in the autoresponder, look for the input with First Name assigned on the page.*

Obviously it makes sense to use a type name that matches if possible, but if you can't find one that fits, any unused one is fine.

Some fields have fixed types, which can't be changed. Which fields have fixed types will depend on which autoresponder you're using.

We'll assign inputs in the editor shortly; first we need to set the Thank You page.

The Thank You page is where your visitors will be sent after submitting your form.

You can type the URL of the next page of your funnel in here, but if it's a published page connected to this one in Convertri's funnel planner, it'll be shown the in the Suggestions list.
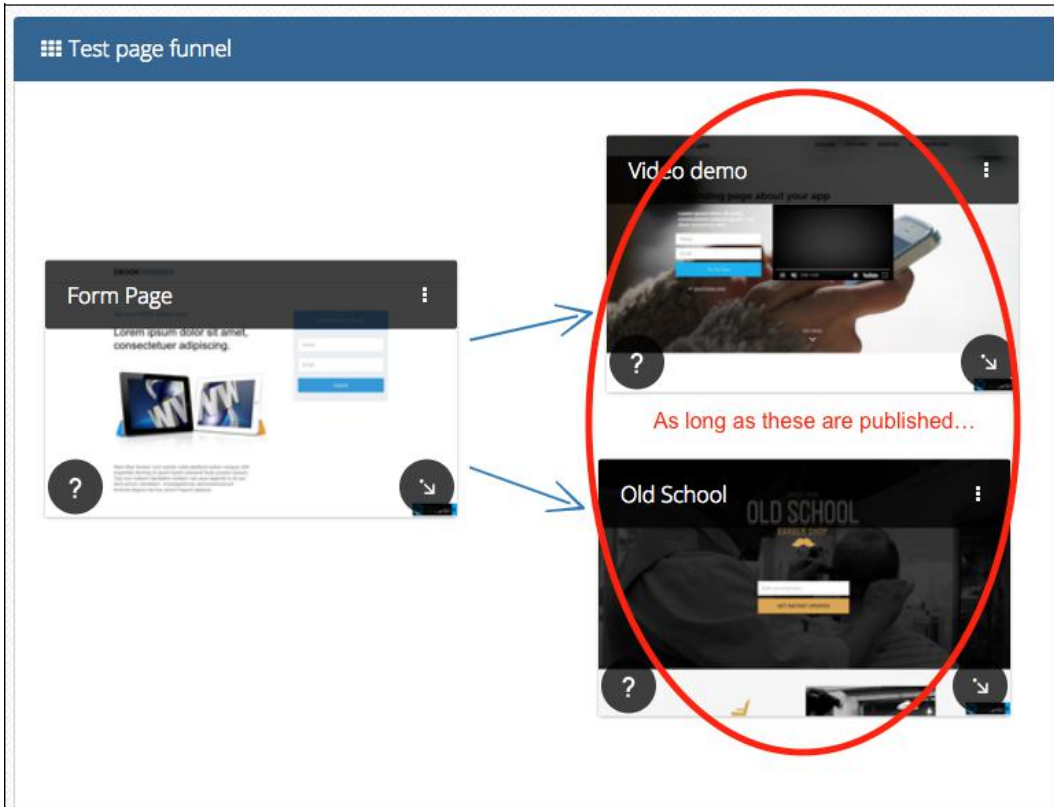
Note that changing the target of the arrow will not automatically update the link. You'll need to change it in the editor and then republish.

> Important: **You do NOT need to add the link to the submit button in the Properties Panel.** If you do this, the link will override the submit function and your form won't be submitted.

Assigning Text Inputs

The final part is to assign text inputs in the editor. You'll only need to do this if you've used custom Text Input fields – if you've only used our pre-set First Name, Last Name and E-mail fields, it's done for you automatically.

To assign an input, first select it in the editor.

Then go to the Properties Panel, and find the Form Field Settings section. In the Assigned Field Type section, choose the type that matches the one you assigned to the relevant autoresponder field.

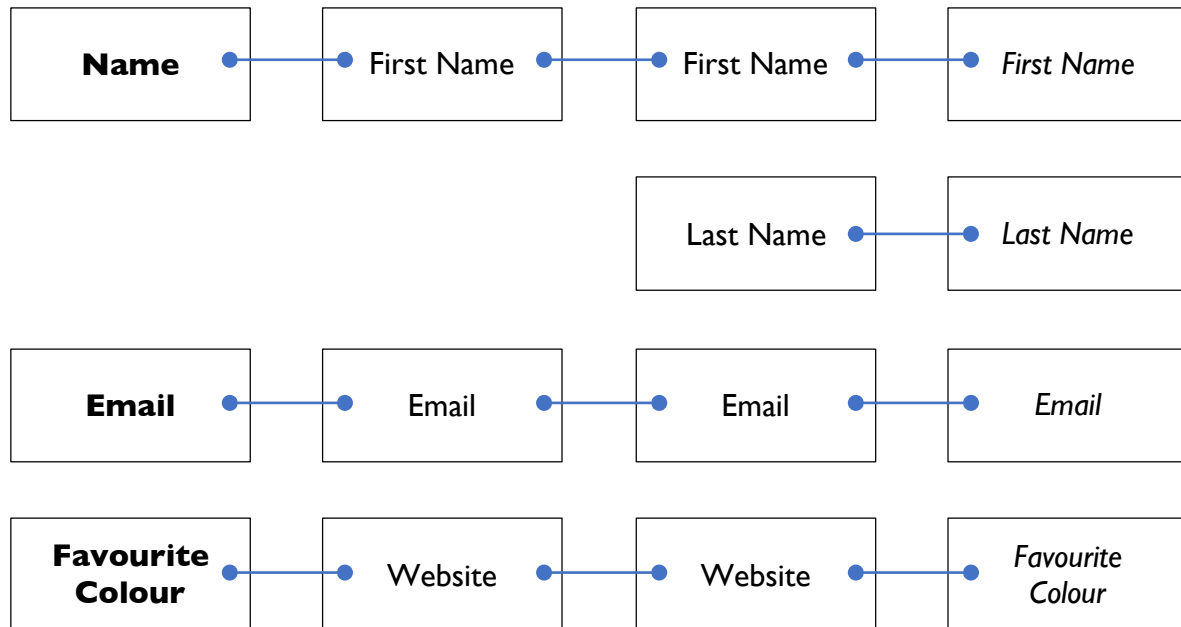The types which are assigned to autoresponder fields will be shown in bold so they're easy to find.

If you're using HTML forms, the fields available to select will be taken from the HTML form code, so you won't see any bolding.

Now, Convertri has a list of autoresponder fields with types attached, and a set of inputs in the editor with types attached. It'll look for matching types to work out where to put the information entered in an input into your autoresponder.
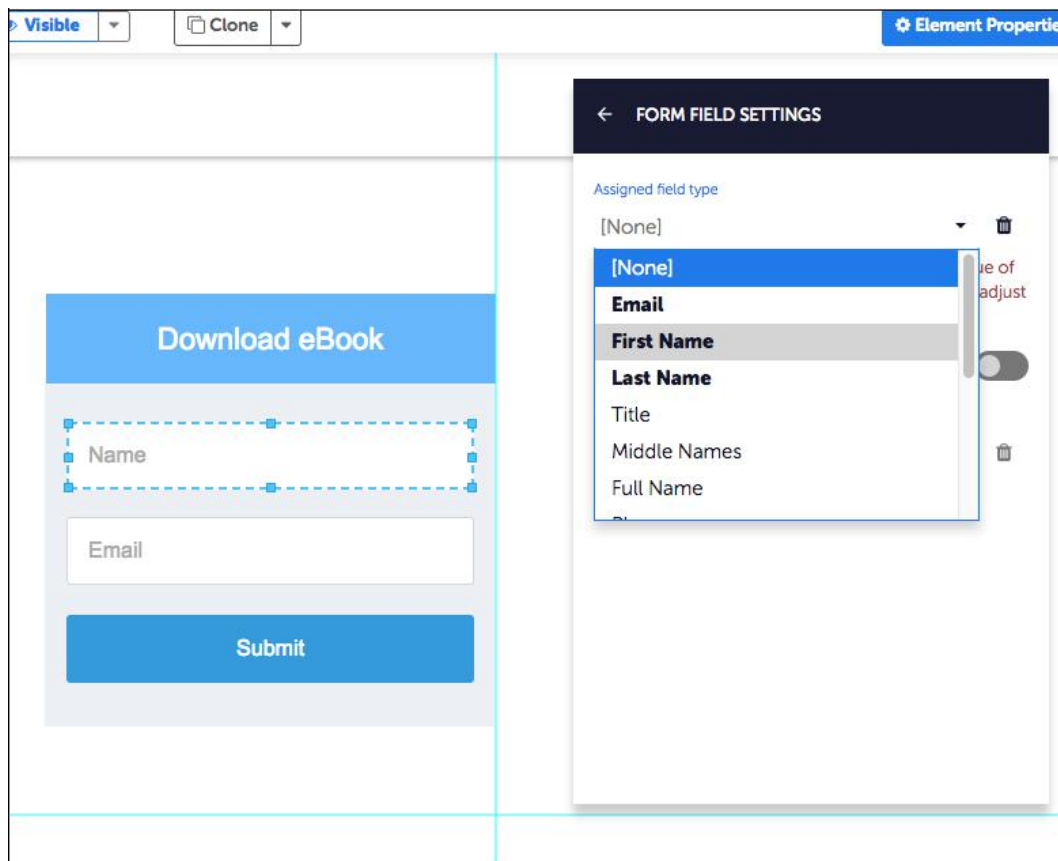
API Field Connection Example

These show typical connections for a form with three text inputs on the page (**Name**, **E-mail** and **Favourite Colour**), and four fields in the autoresponder (*First Name*, *Last Name*, *E-mail* and *Favourite Colour*).

Name ●——●	First Name ●——●	First Name ●——●	*First Name*
		Last Name ●——●	*Last Name*
Email ●——●	Email ●——●	Email ●——●	*Email*
Favourite Colour ●——●	Website ●——●	Website ●——●	*Favourite Colour*

Here, the **Name** text input has the 'First Name' type assigned. The *First Name* autoresponder field also has the 'First Name' type assigned, so anything entered into the **Name** text input will go into the *First Name* field on the autoresponder.

The *Last Name* autoresponder field has the 'Last Name' type assigned. But because no text inputs have that type, nothing will be submitted into that field from this form.

There is no suitable type for Favourite Colour, but because we've assigned both the

Favourite Colour text input and the *Favourite Colour* autoresponder field the same type, Convertri knows that whatever's in the **Favourite Colour** input needs to go into the *Favourite Colour* field. Website has been used in this example, but you could use any type that isn't being used elsewhere.

HTML Form Integration

You can use HTML form integration whenever an API is unavailable (or if you just don't want to use the API for a service, for any reason).

These instructions show you how to connect a form using HTML. You can use this for any service that provides an HTML form embed, which includes 99% of autoresponders. The specific service used in this example is MailChimp, but it'll work the same way for any service.

With HTML forms, Convertri is simply hosting code provided by your autoresponder. This means the redirection step will be set in the autoresponder rather than Convertri. You'll find an option to set a thank you page – in this, add the URL of the page you'd like your visitors to be sent to after signing up.
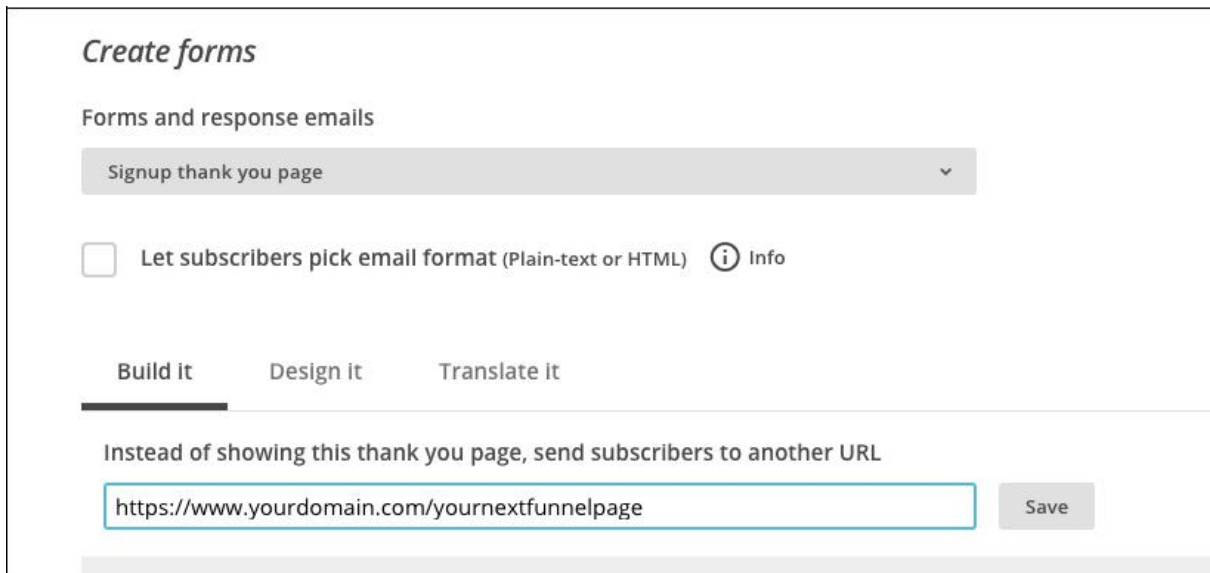
To connect the form, log into your autoresponder and select the list.

Find and copy the HTML embed code. It'll look something like this:
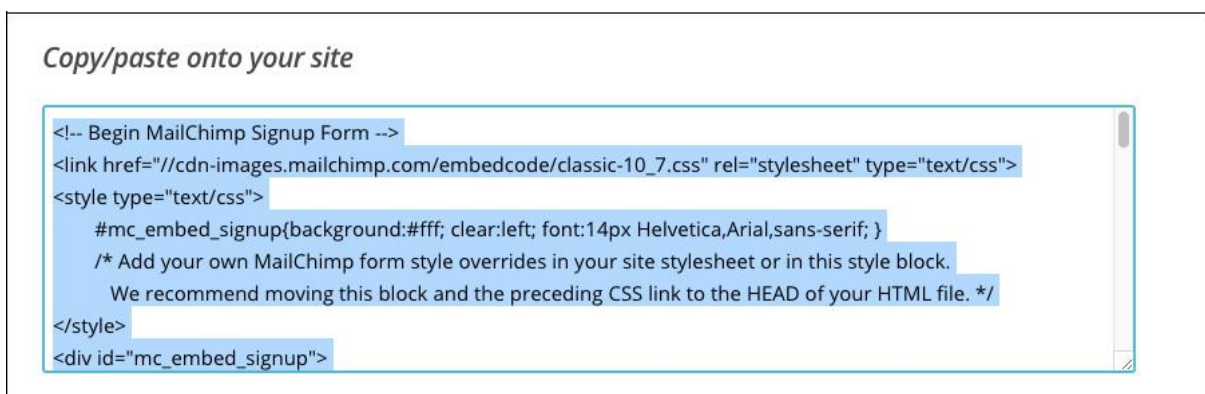
The precise location will be different for each service, but we have a set of instructions for most common services here:

http://help.convertri.com/category/7-forms-and-services

Important: Some services offer both an HTML and (usually much shorter) Javascript version. Convertri needs the HTML – it won't be able to get the data it needs from the Javascript code.

To connect the form, click the Forms button.

Then, go to HTML Forms -> New Form -> Form from HTML Code.
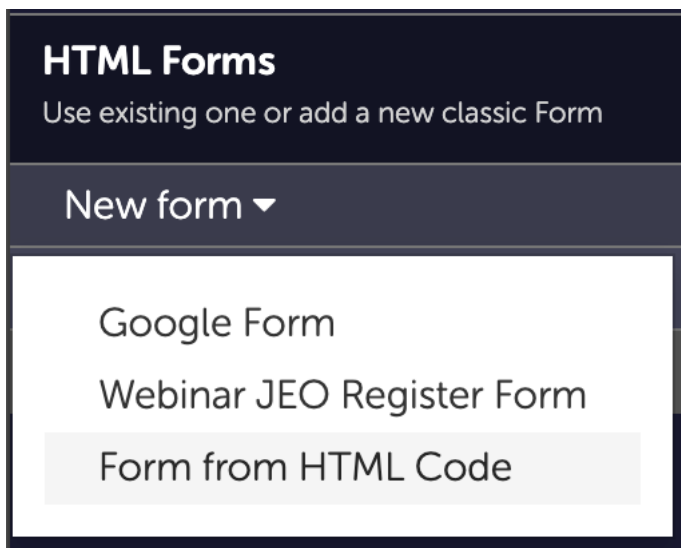
Name your form, then paste the HTML code into the box that says 'Paste your form markup here', and click Create.
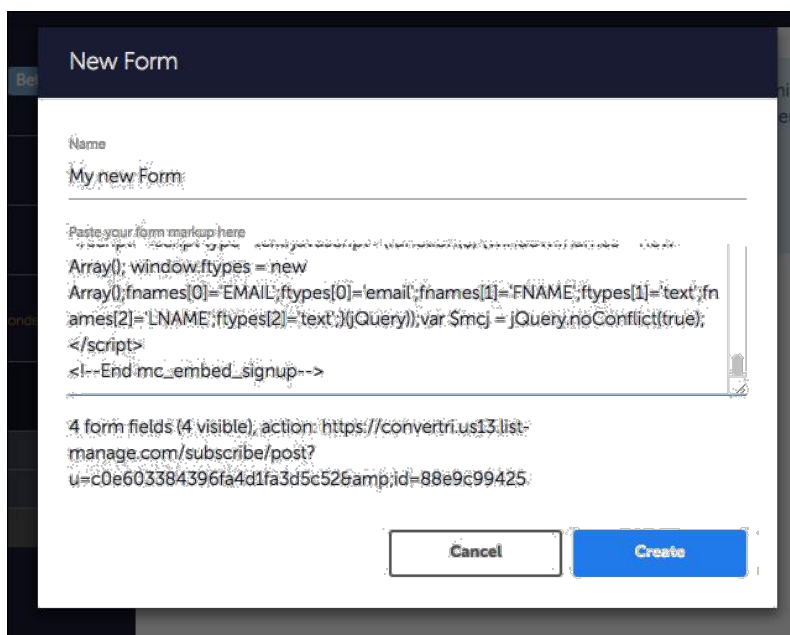
Then, find your new form in the list of available HTML forms, and select Use.

You'll see it become marked as 'in use' at the top of the list.

Then, hit 'Done', and your form will be attached to your page.

Important: just as with API forms, **you do NOT need to add the link to the submit button in the Properties Panel.** If you do this, the link will override the submit function and your form won't be submitted.

After you've attached your form, you'll need to assign your text inputs in the editor, just as with API forms (see page 7)

That's It!

The system can take a bit of getting used to, but when you've done so you'll find it's one of the most flexible form builders available.

Meaning whatever information you want, and whatever it takes to convert – you can do it in Convertri.