

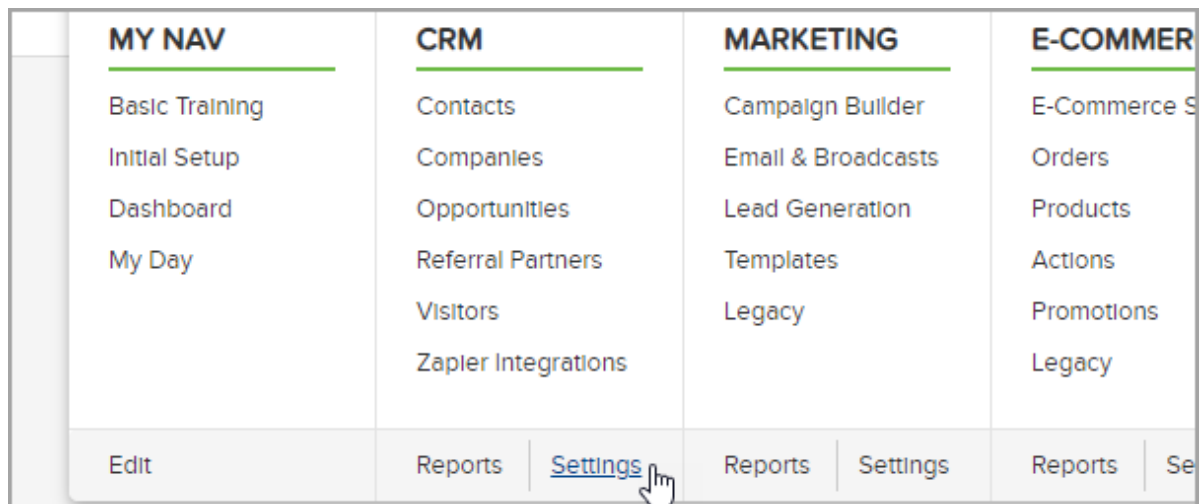
Add a new contact with an internal form

You can create custom internal forms to simplify your business processes. Then, you can choose which forms appear in menus such as quick-add and which forms are the default form.

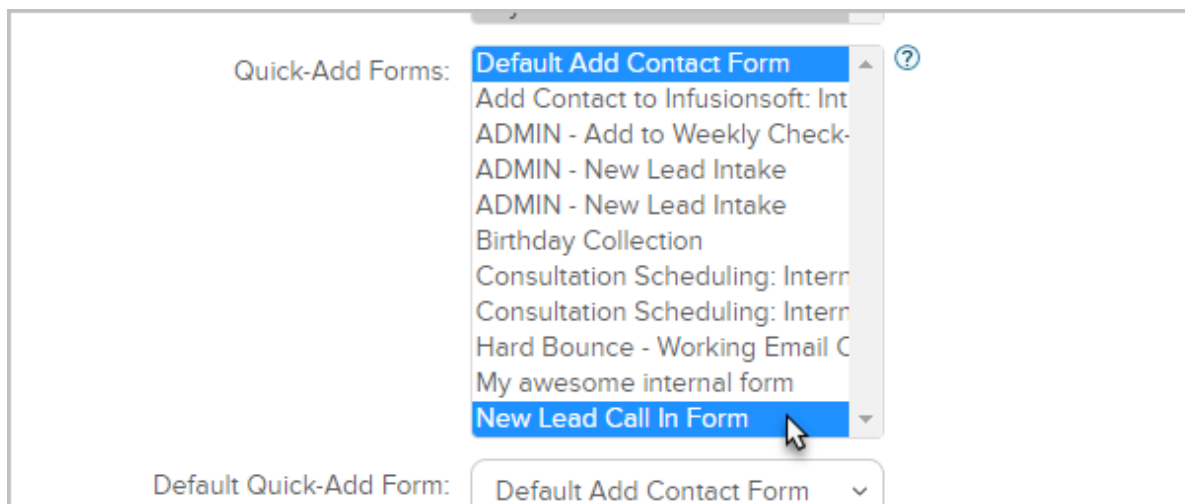
Add additional internal forms to your quick-add drop down list

Only one form can appear as the default in the quick-add list, but you can select additional internal forms to appear in the quick-add drop-down list.

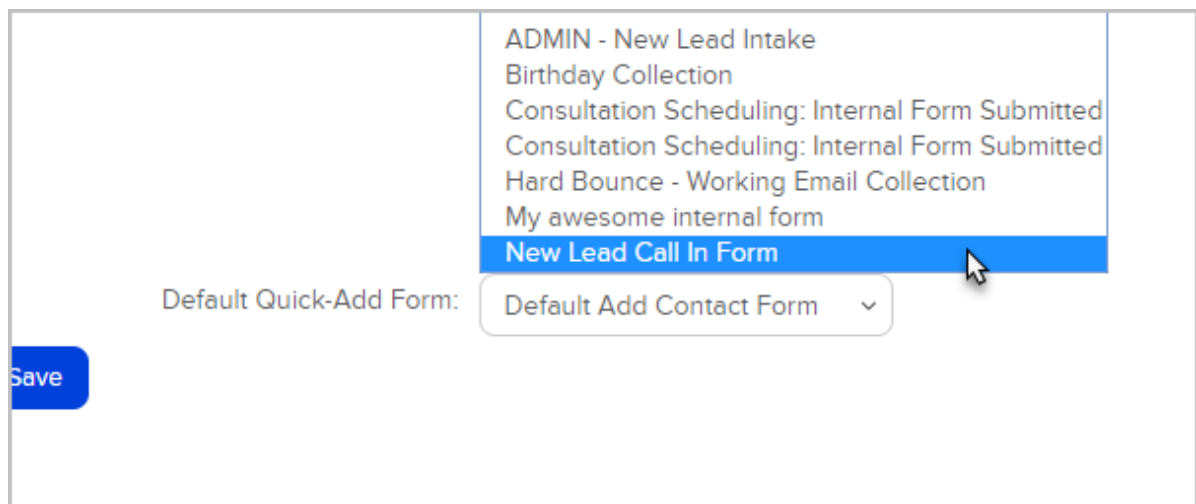
1. Go to **CRM > Settings** in the main navigation menu.



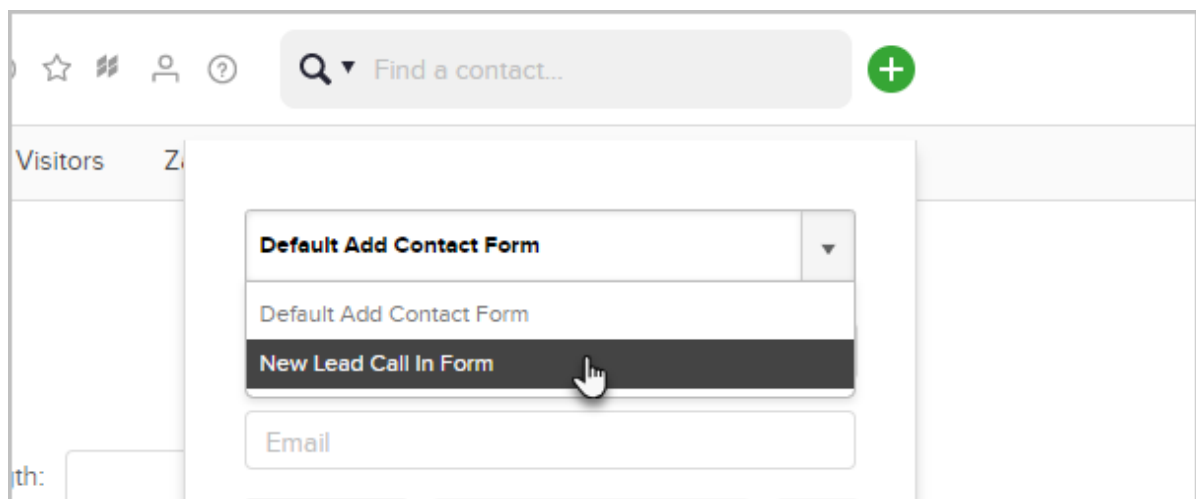
2. Scroll down to **Adding Contacts** and in the **Quick-Add Forms** section, click on the forms that you want to add. Hold down the **Ctrl key** on your keyboard to select multiple forms. In this example, I want the option to use the **Default Add Contact Form** and my **New Lead Call In Form** internal form



3. Note that if i want my **New Lead Call In Form** to be the default form, I would select it from the drop-down below.

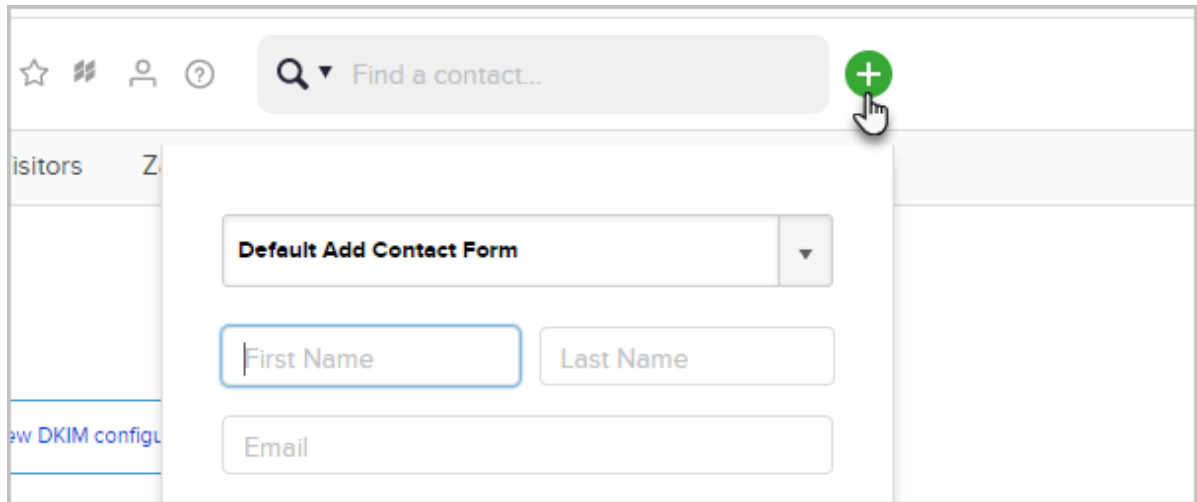


4. Click **Save**. Your selected forms will now appear as options in the quick-add drop-down list.

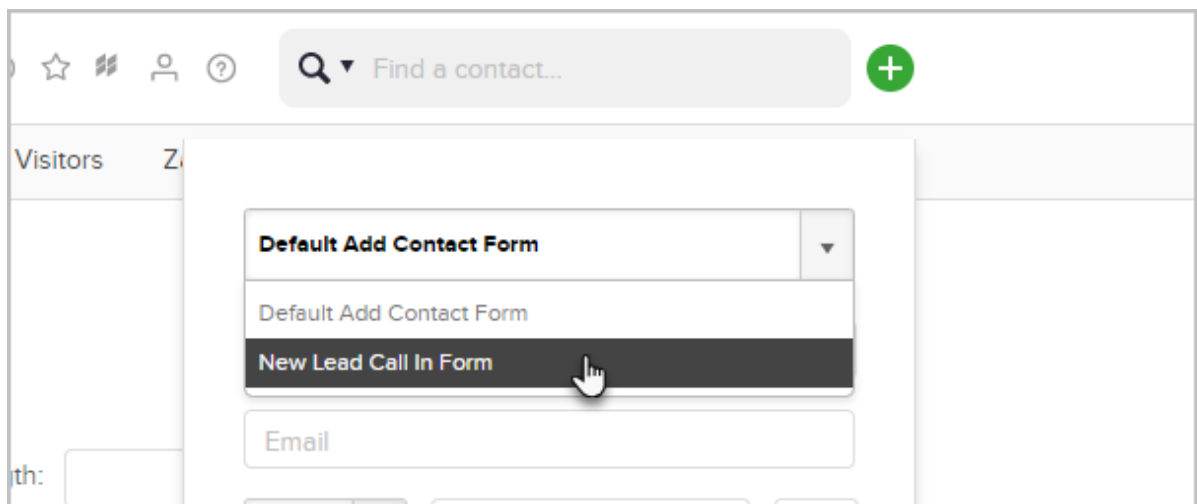


Add a new contact with an internal form using quick-add

1. Go to the home page and click the quick-add (+) button to add a new contact.



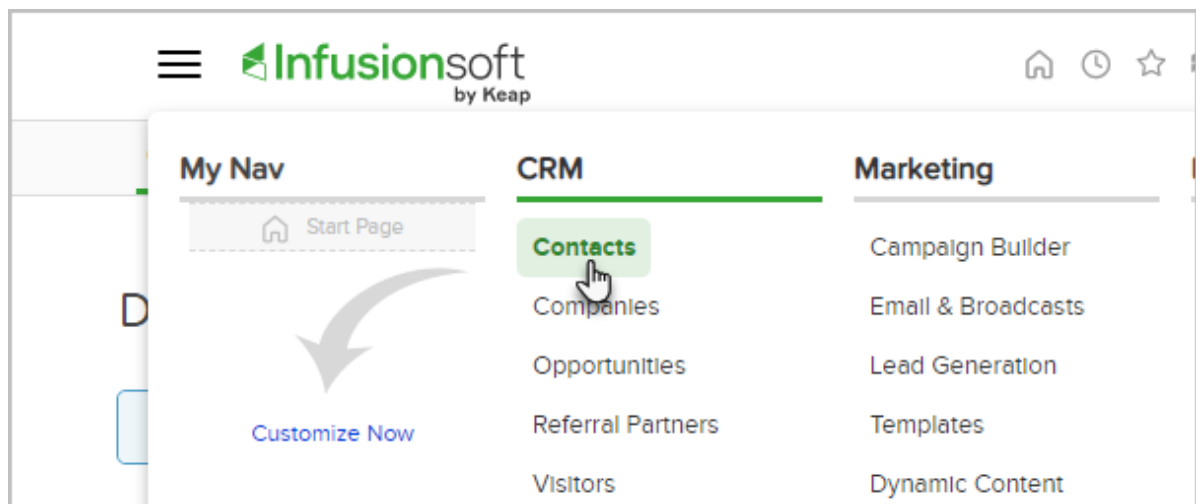
2. Select the internal form that you want to use.



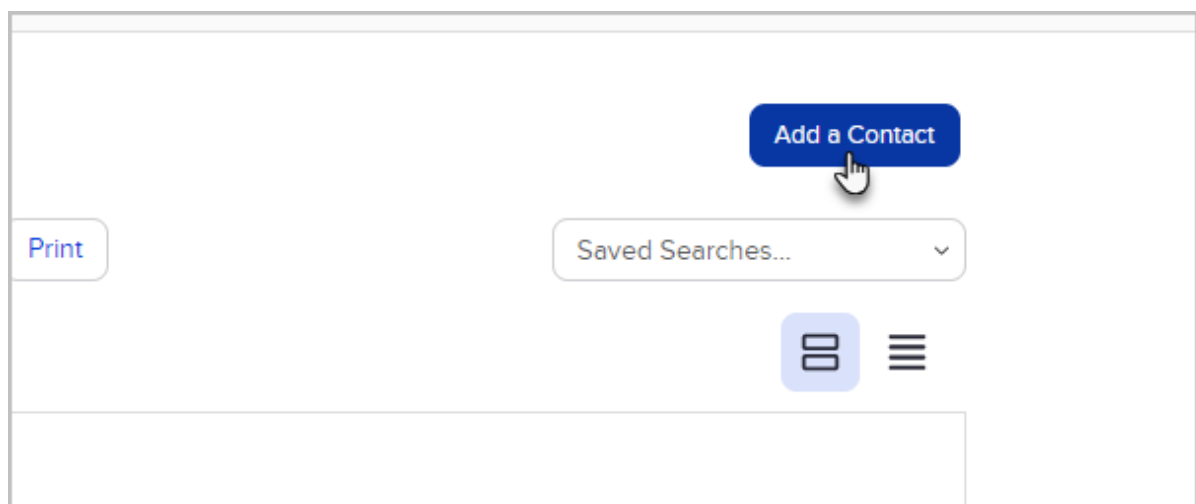
3. Fill out the form and click Save

Add a new contact with an internal form in the Add a Contact page

1. Navigate to CRM and click Contacts



2. Click Add a Contact



3. You can select an internal form from the drop-down at the top of the page.

Add a Contact

Select which form you want to fill out:

Select Action Set

First Name

Email

Company

Phone 1

OwnerID

Street Address 1

Street Address 2

- Please select one
- Basic Add Contact Form
- Advanced Add Contact Form
- Add Contact to Infusionsoft: Internal Form
- ADMIN - Add to Weekly Check-In
- ADMIN - New Lead Intake
- ADMIN - New Lead Intake
- Birthday Collection
- Consultation Scheduling: Internal Form Submitted
- Consultation Scheduling: Internal Form Submitted
- Hard Bounce - Working Email Collection
- My awesome internal form
- New Lead Call In Form**

4. Fill out the form and remember to click **Save**.

Note: [Click here](#) to learn how to add internal forms to this list using Campaign Builder.