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.

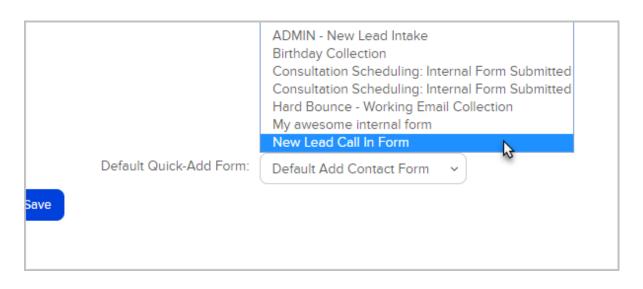
1. Go to **CRM > Settings** in the main navigation menu.

| MY NAV | CRM | MARKETING | E-COMMER | |
|----------------|---------------------|--------------------|--------------|--|
| Basic Training | Contacts | Campaign Builder | E-Commerce S | |
| Initial Setup | Companies | Email & Broadcasts | Orders | |
| Dashboard | Opportunities | Lead Generation | Products | |
| My Day | Referral Partners | Templates | Actions | |
| | Visitors | Legacy | Promotions | |
| | Zapler Integrations | | Legacy | |
| Edit | Reports Settings | Reports Settings | Reports Se | |

 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

| | , | |
|-------------------------|----------------------------------|-----|
| Quick-Add Forms: | Default Add Contact Form | ▲ ⑦ |
| | Add Contact to Infusionsoft: Int | |
| | ADMIN - Add to Weekly Check- | |
| | ADMIN - New Lead Intake | |
| | ADMIN - New Lead Intake | |
| | Birthday Collection | |
| | Consultation Scheduling: Intern | |
| | Consultation Scheduling: Intern | |
| | Hard Bounce - Working Email C | |
| | My awesome internal form | |
| | New Lead Call In Form | * |
| | 12 | |
| Default Quick-Add Form: | Default Add Contact 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.

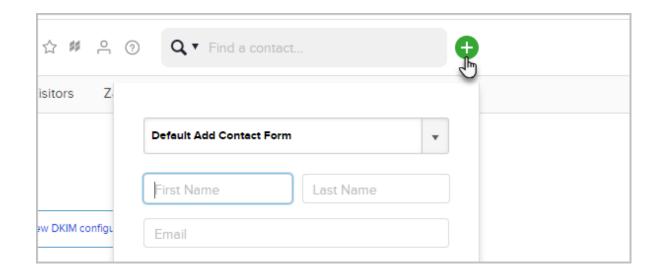


4. Click **Save**. Your selected forms will now appear as options in the quick-add dropdown list.

|) 🖒 🛱 | (| ⑦ Q ▼ Find a contact | Ð |
|----------|---|--------------------------|---|
| Visitors | Z | | |
| | | Default Add Contact Form | • |
| | | Default Add Contact Form | |
| | | New Lead Call In Form | |
| ıth: | + | Email | |

Add a new contact with an internal form using quickadd

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.

|)☆≇ 음 (| Q ▼ Find a contact | Ð |
|------------|--------------------------|---|
| Visitors Z | | |
| | Default Add Contact Form | • |
| | Default Add Contact Form | |
| | New Lead Call In Form | |
| | Email | |
| th: | | |

3. Fill out the form and click Save

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

1. Navigate to CRM and click Contacts

| = | ៩ Infusion ទួ | Soft by Keap | |
|---|----------------------|-------------------------------------|---------------------------------------|
| M | y Nav | CRM | Marketing |
| | Start Page | Contacts | Campaign Builder |
| | | Com pa nies Opportunities | Email & Broadcasts Lead Generation |
| | Customize Now | Referral Partners | Templates |
| | | Visitors | Dynamic Content |

2. Click Add a Contact

| | Add a Contact |
|-------|------------------|
| Print | Saved Searches ~ |
| | |
| | |

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: | | Basic Add Contact Form 🗸 🗸 | |
| Select Action Set | Please select on | Please select one Basic Add Contact Form Advanced Add Contact Form | |
| First Name | | Add Contact to Infusionsoft: Internal Form ADMIN - Add to Weekly Check-In | |
| Email | | ADMIN - New Lead Intake ADMIN - New Lead Intake | |
| Company | | Birthday Collection Consultation Scheduling: Internal Form Submitted | |
| Phone 1 | Business v | Consultation Scheduling: Internal Form Submitted Hard Bounce - Working Email Collection | |
| OwnerID | Martin Cash | My awesome internal form New Lead Call In Form | |
| Street Address 1 | | 2 | |
| Street Address 2 | | | |

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.