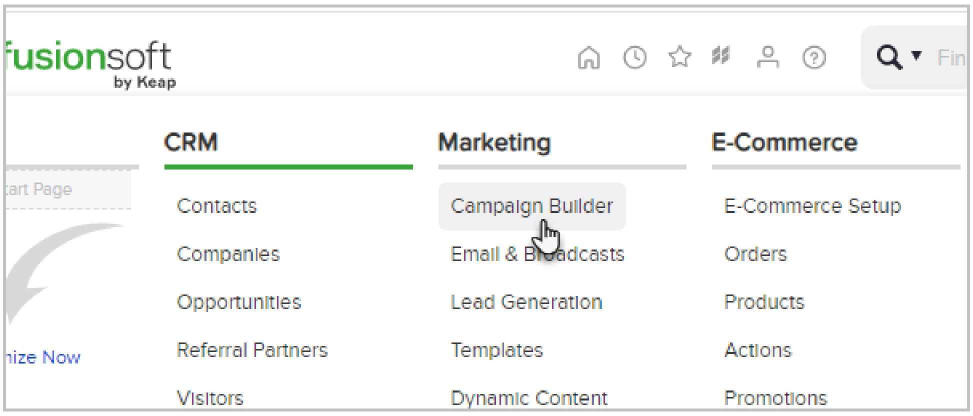
Campaign Goals - Internal Forms

This article applies to:

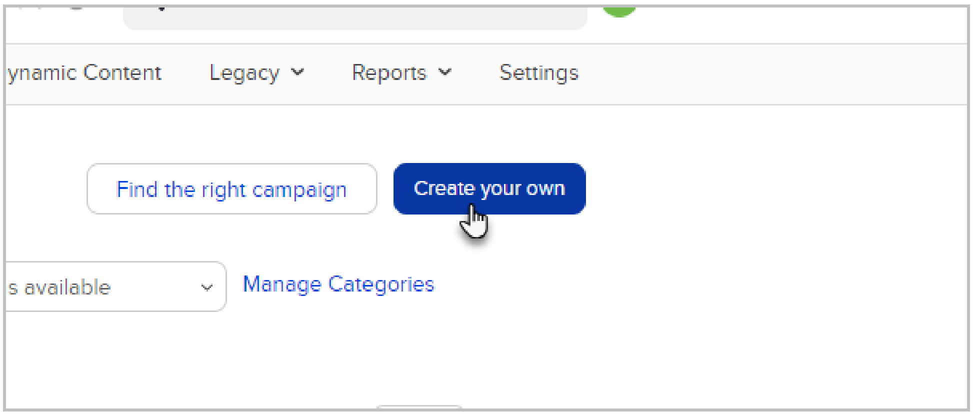
Max
Max Classic

An internal form enables you to submit a form on behalf of a contact while working inside of Infusionsoft. This is a way to standardize the collection of information from your contacts as you and your team work through your sales process. An internal form can also be a trigger for launching automation, which can streamline your workflow.

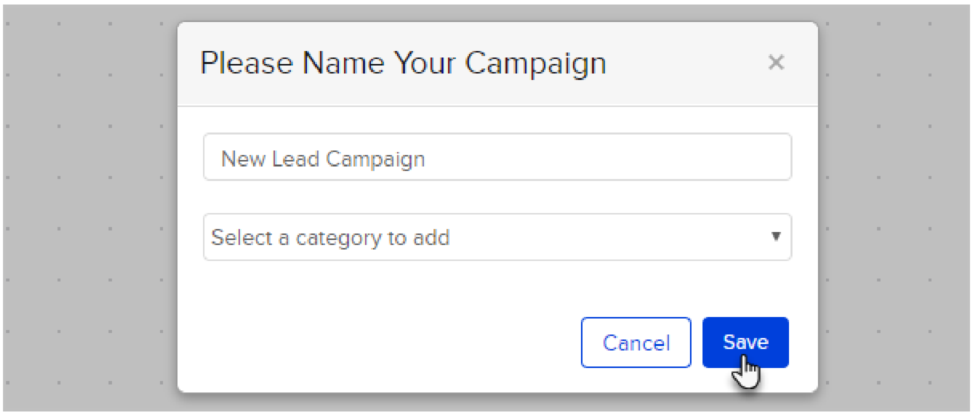
1. To configure an Internal form, go to the **Marketing** section of your application and click **Campaign Builder**.



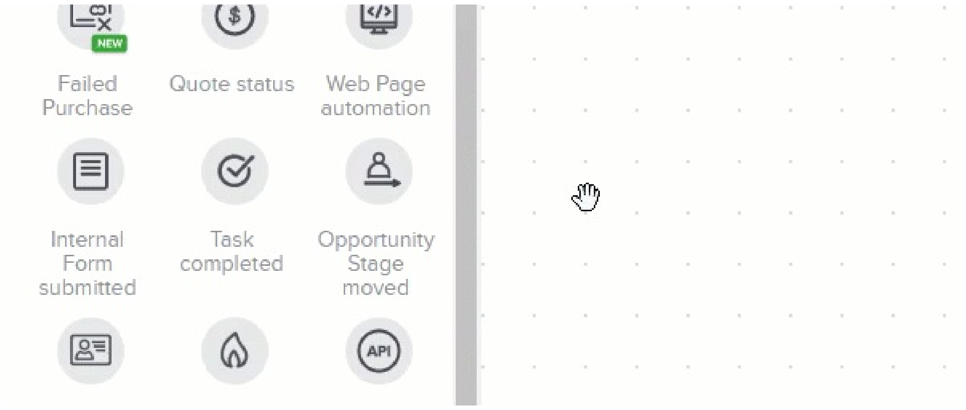
2. Click **Create your own** in the upper right of the page.



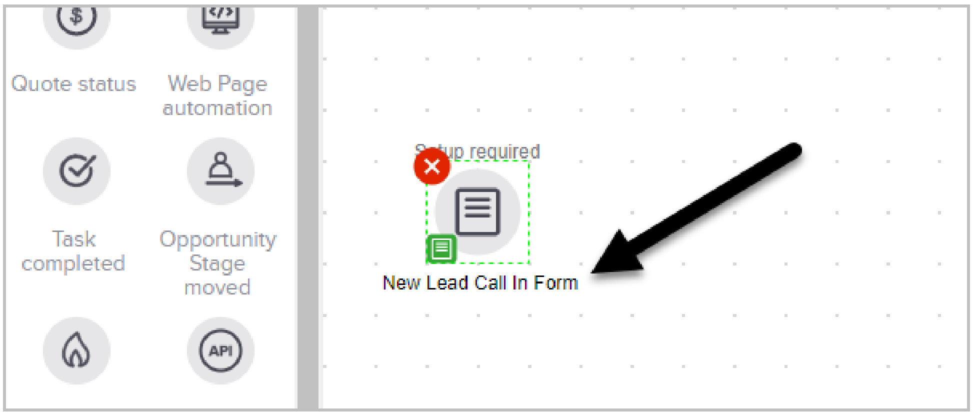
3. Add a **name** to your new campaign, and click **Save**.



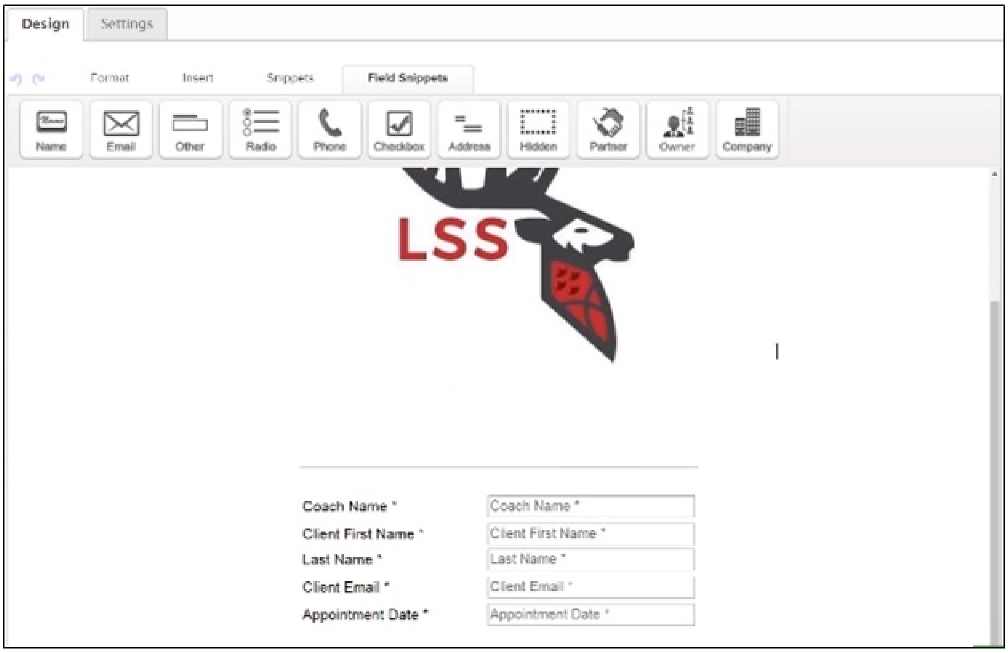
4. From the **Goals** menu on the left hand side, click and drag **Internal Form Submitted** goal onto the canvas.



5. Double-click the **Internal Form Submitted** title, and name the **Internal Form**.

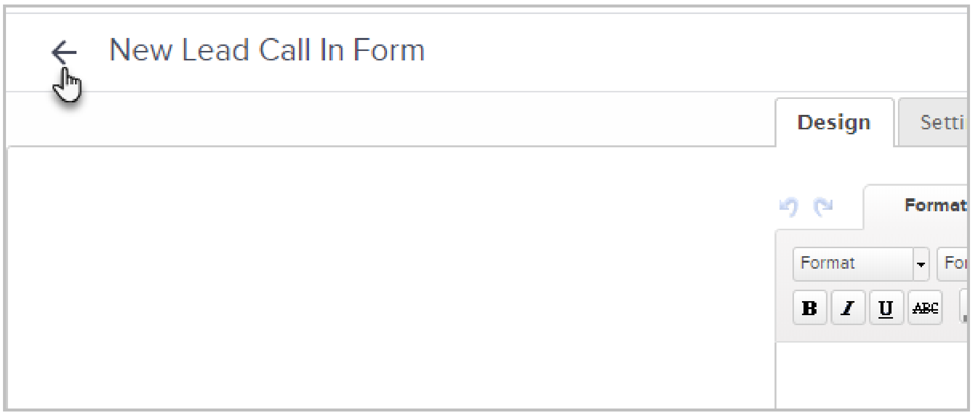


6. Double-click the **Internal Form** icon to configure the internal form. The default internal form will open in the form editor. Click **Field Snippets** tab to add the desired fields to the internal form. Add **Field Snippets** and **Tags** as needed for your form.

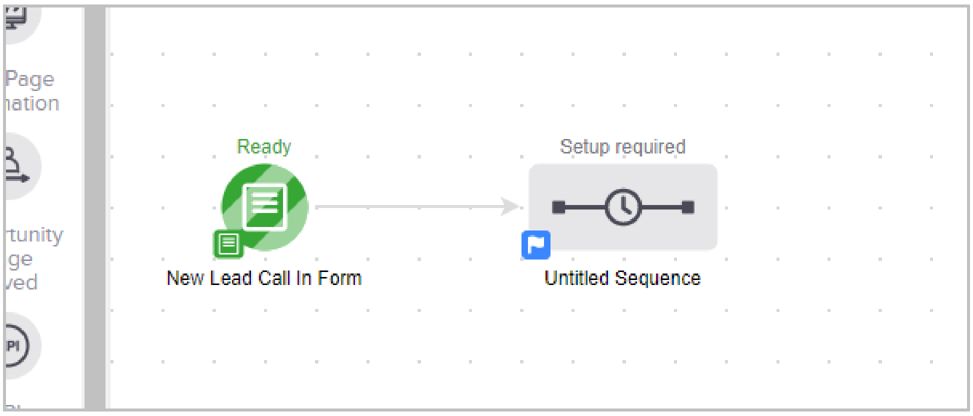


7. When you have finished editing, mark this form from draft to ready in the upper right hand corner. Then click **Save & Exit** to return to the **Campaign Builder**.

8. Click the back arrow to return to the campaign canvas area.

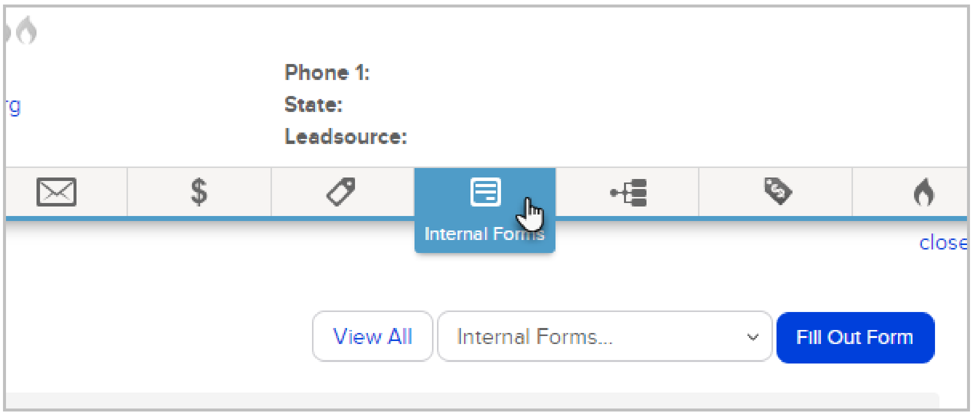


9. Attach a sequence with any automation that you desire, such as sending an email, tagging, or creating a task.



10. You can configure your default internal form from the Branding Center under the **Admin** section of the main menu.
11. Click **Publish** to make this form available.

12. You can now access this form from the quick view of the **Contact Record** or from within the contact record by typing in the form name, choosing the correct form from the drop-down, and clicking **Fill Out Form**.



13. After you fill in the fields and click **Save**, the fields are added to the contact record.
14. Any tags applied by the **Internal Form** choices will also be added to the contact record and can be viewed by clicking the **Tags** tab.