

# **Creating your first web form in Zoho Forms**



This walkthrough is to help you get started with creating a form using Zoho Forms. Follow the simple step-bystep instructions given below to build forms that perfectly match your requirements.

### Creating a new account

To build a form using Zoho Forms, you must first create an account in Zoho Forms. To create an account in Zoho Forms,

- 1. Go to https://www.zoho.com/forms/signup.html.
- 2. Enter your details, and click **SIGN UP FOR FREE** if you agree to the Terms of Service and Privacy Policy.
- 3. Alternatively, you can sign in using your Google, Facebook, LinkedIn, or Office 365 account.

Get started with free online forms.
Company Name
Email
Password
Phone number (Optional)
Country/Region
United States
Your data will be stored in the US data center.
Alabama
□ I agree to the <u>Terms of Service</u> and <u>Privacy Policy</u> .
SIGN UP FOR FREE
or sign in using G Google 🗗 in 🚺

# Form Builder Language

The form builder supports the following languages in the web version.

S.No	Supported Form Builder Language (web version)
1	English
2	Chinese (Simplified)
3	Dutch
4	German
5	Spanish
6	French
7	Portuguese

8	Japanese
9	Italian

Our mobile app supports the following Form Builder languages.

S.No	Supported Form Builder Language (mobile app)
1	English
2	Chinese (Simplified)
3	Dutch
4	German
5	Spanish
6	French
7	Portuguese
8	Indonesian
9	Russian
10	Japanese
11	Hindi

To change your default language,

- 1. In the form builder, click your profile picture in the top right and click **My Account** .
- 2. Under **Personal Information**, change the **Language and Country** according to your preference and save your settings.

The form builder will now be available in your preferred language. <u>Learn more</u> about changing your form builder language.

Accounts			
Profile Personal Information	Profile		
Email Address Mobile Numbers		l com	
) Security	First Name *	Last Name	
③ Multi-Factor Authentication	Michelle	Brown	
Settings	Display Name	Gender	
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2 Compliance	(GMT -6:00) Mountain Daylight T	ne (America/Edm 👻	
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	My Email Addresses You can use the following email addr	sses to sign in to your account and also to reset your password if you ever forget it.	
	michellebrown@zylker.com 7 years ago	반	
		+ Add Email Address	

Note: The default phone language will also be the app language in the Zoho Forms Mobile App.

### **Building a new form**

You can build a new form in the following ways:

- From scratch
- Use the <u>pre-built form templates</u> available
- <u>Create CRM Forms</u> if the purpose of your form is to build a form to automate adding data from the form entries to your Zoho CRM account.
- <u>Create AI Forms</u> if you want to generate form fields automatically by simply entering a prompt.
- <u>Convert PDFs and images into forms</u> directly by uploading them.

#### Creating a form from scratch

1. Click **New Form** in the top-right corner of your screen under the *Forms* tab.

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D Reports	Shared Forms Org Users' Forms	Created on: Dec 10, 2024				
Tasks	📩 My Folders	Created on: Sep 27, 2024				
O Users	🗍 Trash	Created on: Sep 24, 2024				
Approvals		Created on: Sep 24, 2024				
Control Panel		Created on: Jul 25, 2024				
		Contact Us Created on: Jul 25, 2024				
		Created on: Jul 25, 2024				
		Created on: Jul 11, 2024				
		1 - 8 of 8 forms				

- 2. Click **Create From Scratch** at the top of the screen.
- 3. Select the Form Type to be either <u>Standard</u> (Displays multiple fields on a page) or <u>Card</u> (Displays one field on a page).
- 4. Give a name to your form in **Form Title**.

Forms		Subscription	$\Box$	Ĉ	
CREATE FROM SC	CRATCH USE TEMPLATES CREATE CRM FORM CONVERT PDF TO FORM AFORMS				
Forms Reports Reports Correl Approvals Control Panel	Form Type   Standard   Standard   Show one field on a page   Form Tite   Testimonial Form   Cancel				

5. Click **Create**. You can start building your form in the form builder.

#### Creating a form using templates

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Form Templates serve as a convenient starting point for new users of Zoho Forms seeking a pre-designed form that either aligns closely with their needs or simply appeals to them visually, without starting from scratch. Selecting a template streamlines the form-building process, making it more intuitive and time-efficient.

Numerous pre-built form templates across various categories are available in Zoho Forms to make your job easier. You can use these templates directly or customize them to meet your requirements and share your forms instantly. To use a form template,

- 1. Click **New Form** in the top-right corner of your screen under the *Forms* tab.
- 2. Under **USE TEMPLATES**, you can view the list of pre-built form templates on the left.

Forr	ns		Subscription 📢 🗘 🕕
E			Use this template
Forms	Q Search		
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Ê	1. Sign Up	$\bigcirc$	
Tasks	2. Event Registration	Signup	
<sup>∧</sup>	3. Trial Request	Sigilup	
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20	6. Product Feedback	<u>0</u>	
Control	7. eBook Download	First Last	
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	1. Contact Us		
	2. Client Details	Company Website	
	3. Email Subscription		
	4. Software Evaluation		
	5. Complaints	Sign me up	
	6. Bug Tracker		
	E-commerce		
	1. Order Form		
	2. Meal Order Form		
	3. Product Order form		

- 3. You can search for your required template and select it.
- 4. Click **Use this template** in the top-right corner.

The template will open in your form builder, where you can modify, add, or delete fields, as well as change the theme as per your requirements.

## **Modifying form properties**

You can change your form's title and description, and set the position of the field labels in your form. To do so, navigate to the top of the form in the builder screen and click the title of your form. The **Form Properties** pane will appear on the right. This panel will be displayed by default if you haven't added any field in your form yet.

Subscription Form		
Description		
Subscribe to our form and get the	e latest updates!	
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In the **Form Properties**, you can modify the following:

- Form title : You can modify the title of your form here. By default, the Form title will be displayed in the live form. If you wish to hide the title, navigate to Settings > General > Display > Form Header and select the Hide option.
- **Description** : You can add or modify the description of your form that will be displayed under the form title. You can include information such as instructions, and special notes in the description.
- **Label Placement** : *Label* denotes the name of a field. For example: *Single Line, Multi Line, Number, etc*. You can adjust the position of the label to be in the Top, Left or Right of the fields in your form. The selected label position will be applied to all the fields added to your form.

Тор		Left		Right	
Customer	<sup>-</sup> Feedback	Custo	omer Feedback	Custo	omer Feedback
Name Elizabeth First	<b>Parker</b> Last	Name Email	Elizabeth Parker First Last	Name Email	Elizabeth Parker First Last
Email elizabeth@zylker.com How did you hear about u	s?	How did you hear about us?	Social Media Television Friends and family	How did you hear about us?	Social Media Television Friends and family
Social Media Television Friends and family Will you use our service in	the future?	Will you use our service in the future?	💽 Yes 🌑 No 🌑 Maybe	Will you use our service in the future?	💽 Yes 🌑 No 🌑 Maybe
• Yes • No	• Maybe		Submit		Submit

If you set the label placement to **Top**, you can choose whether the field instructions in your form should be aligned at the top or bottom of the field input box.



Form Properties		×
Form title		
Upload Resume		
Description		
Label Placement		
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Тор		
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Intended for form owner's reference	and usage; will not be displayed to o	ther users/respondents. <u>Learn more</u>
		Cancel
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### Form Nickname

Under *Form Nickname*, you can provide an alternate name to a form for your reference and usage. This name will appear in your form builder as well as in the *My Forms* listing. It will be visible only to the form owner and to the <u>users with the *Modify Form* permission</u>. Other users and respondents will see only the Form Title. For example, if you have multiple forms with the same name, you can give a nickname to each form for easier identification.

# Adding fields to your form

Different types of fields available in Zoho Forms will be listed under the form fields on the left side of your form builder.



To add a field to your form,

- 1. You can either click a field from the **Form Fields** or drag and drop the field on your form. <u>Learn more</u> about the field types in Zoho Forms.
- 2. You can re-arrange the fields in your form by clicking and dragging them up or down. You can also duplicate a field along with its properties.
- 3. You can modify the properties of the fields added under **Properties** of the respective fields and click **Save**.

Properties X			
Field Label		Rich Text	
Name			
Instructions			
Field Size			
Small	Medium	Large	
Name Elements			
Ø Title		=	
I First		=	
		=	
Ø Middle		=	
Visibility			
Disable Field			
Privacy ()			
Mark as Personal Encrypt			
		Cancel	

4. By default, a **Submit** button will be added at the bottom of your live form.

You can customize the appearance of your form as required or use suitable pre-designed themes available in Zoho Forms.

#### Limit on the number of fields in a form

You can add a maximum of 1200 fields to a form. Form fields with multiple elements will be counted based on the number of field elements.

For example, the field count is taken as follows:

• An *Email* field counts as 1.

- *Phone* field with Country Code counts as 2.
- *Dropdown* field with grouped choices counts as 2.
- Each element in the Name and Address fields counts as a distinct field element.
- Each question in the *Matrix Choice* field counts as a distinct field element.

Note : Please do not collect passwords or CVV using Zoho Forms, as it is against our Privacy Policy.
Learn more

#### **Previewing your form**

After building your form, you can see a preview of how your live form will appear. To do so, click the Preview icon in the top-right corner to the left of the **Access Form** button. A preview of your form will open up where you can see how the theme will look on your desktop, tablet, and mobile before applying it to the form. You can switch to the other themes in the right panel and preview them on desktop, mobile, and tablet to find the one that best suits your needs. You can also click the **Access Form** button to view how your form would look to your respondents. You can also access your live form by clicking your form's name under the **Forms** tab, as shown below:

Contact Us Get in touch with us!	
Name	
First	Last
Email	
Leave us a few words	
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Su	ıbmit

<u>Check out</u> the how-tos on getting started with Zoho Forms.

You can further beautify your form with our <u>fully customizable theme builder</u>.

