

SIGNUP

FORMS





Signup forms are the most popular tools for building a contact database. They let your website visitors become contacts by entering basic details such as name and email address. The best part about signup forms is the fact that contacts who sign up through a form are giving their consent to receive newsletters.

In this guide, we'll take you through different phases of signup form creation, how to share your signup form online, and understand form reports and analytics.

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Create signup form

Before you create a signup form, you must have a mailing list to link the form with and add contacts to the list automatically.

Signup form creation is divided into five phases:

Choose the right template – Choose a signup form from the available designs based on your needs.

Customizing the signup form – Customize the font, color, style, and additional fields in your form.

Adding thank you pages and signup response emails – Draft confirmation email messages and customized thank you pages.

Associating signup form to a mailing list - Contacts join the associated mailing list via this signup form.

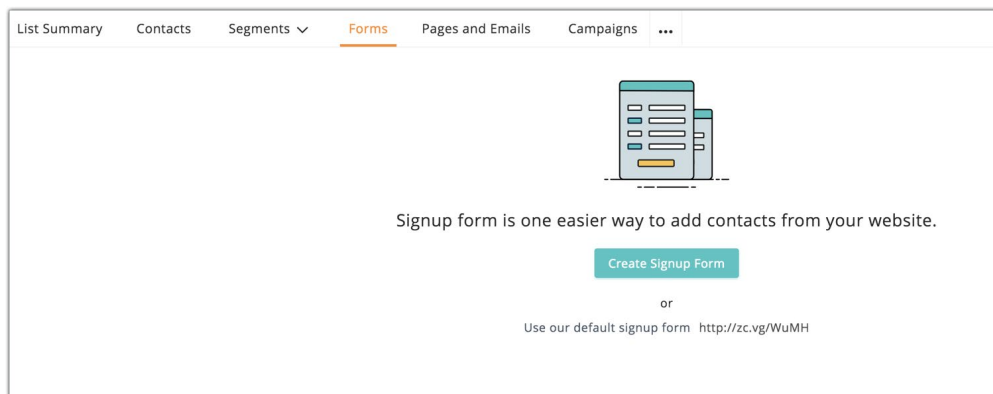
Publishing the signup form – To generate signup form code, URL, and button so that you can share it on online platforms.

Choosing a signup form template


It is always easier to change an existing template than to start one from scratch. Unless you have a very specific need, we suggest choosing a template from our gallery.

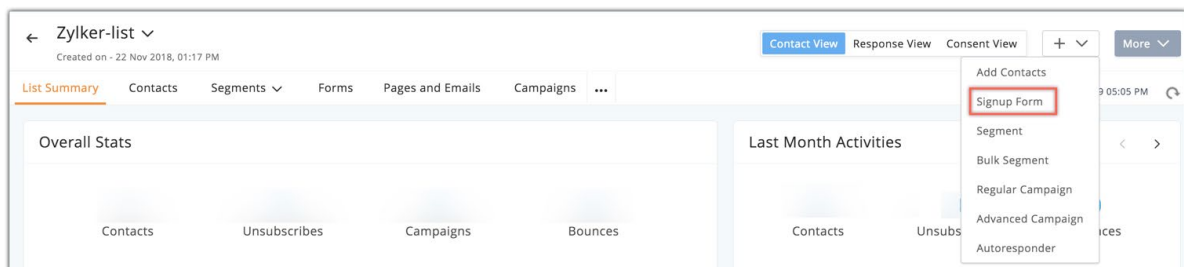
To navigate to signup form templates:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the Mailing List, you want to use to create a form for.
- 3) Click Signup Form Tools and select Forms.
- 4) Click Create Signup Form.



If you have already created a signup form, you can create another one for the by following the below steps:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the Mailing List, you want to use to create a form.
- 3) Click  in the top-right corner and click Signup Form.

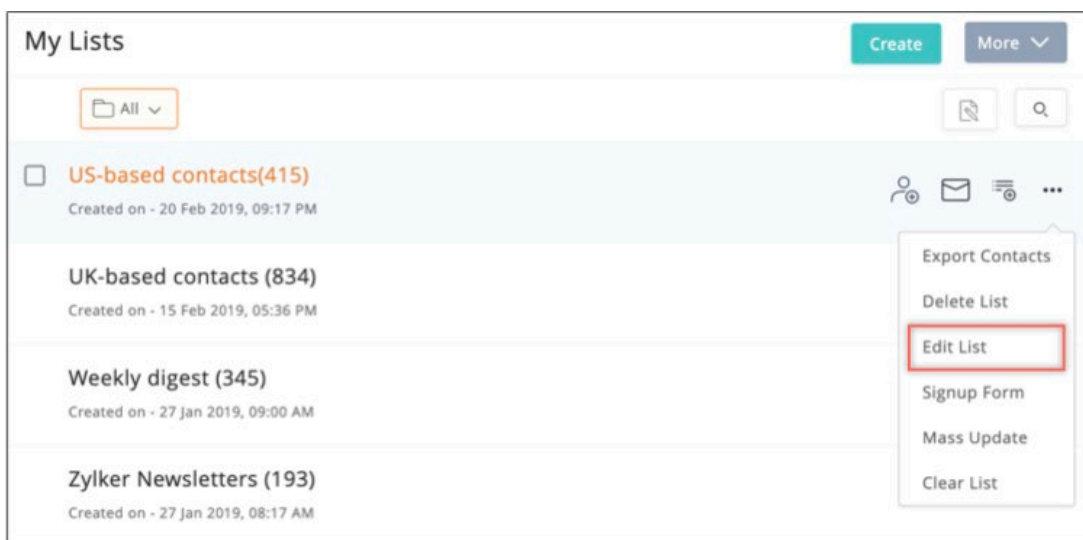




Note: *If you do not find the “Create Signup form” option in the Mailing List section, it means the sign up form subscription has been disabled for that mailing list.*

To enable signup form:

1. Select Contacts from the Navigation bar and choose Mailing Lists.
2. Select the desired mailing list and click the More button.
3. Click Edit List from the dropdown option.



4. Click the Change link and allow signup form subscriptions for the mailing list.
5. Click Save.




Select Signup Form

This is the first phase of sign-up form creation and you can select a sign-up form based on your requirements.

What type of form would you like to create?


Compact Forms



Choose from our compact signup form templates when your needs are simple.

[Choose](#)


Long Forms



Choose from our long form templates for more fields and additional specifications.

[Choose](#)

Forms Library



Choose a signup form template matching your needs from your own repository.

[Choose](#)

Compact Forms

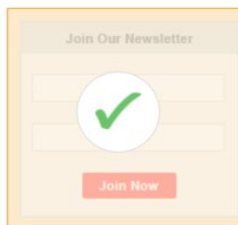
These are short and concise forms that meet the basic subscription standards, using fields such as 'name' and 'email address'. This form comes in two types:

Vertical Form - If you're a minimalist, this form is for you. This form only contains basic fields such as 'email address' and 'name'.

Compact Forms
Long Forms
Forms Library

Vertical Forms ▼

Join Our Newsletter



Join Our Newsletter

Email

Name

Join Now

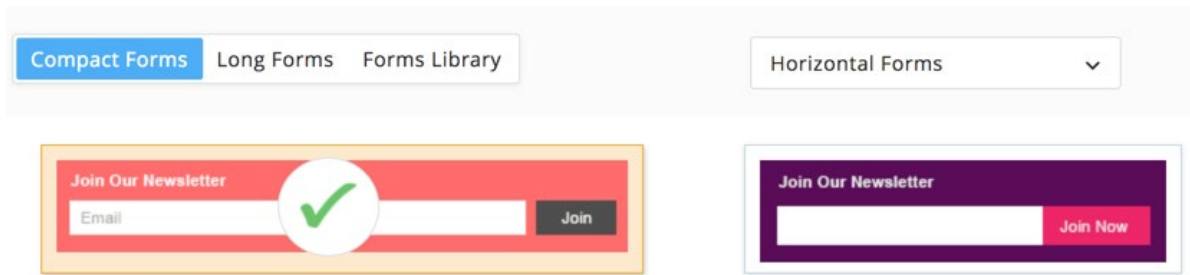
Join Our Newsletter

Email

Name

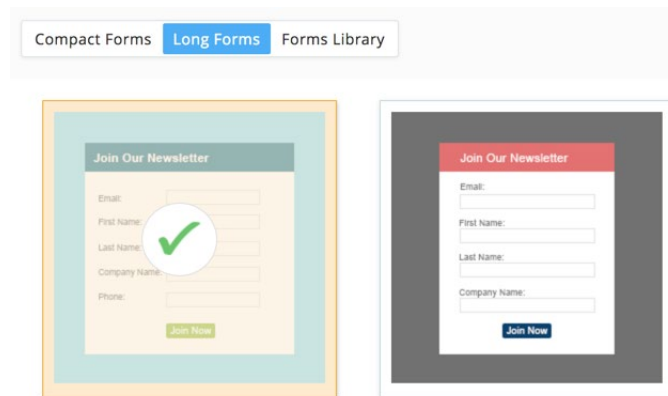
Join Now

Horizontal Form - If your web page has space constraints, this is the template you need.



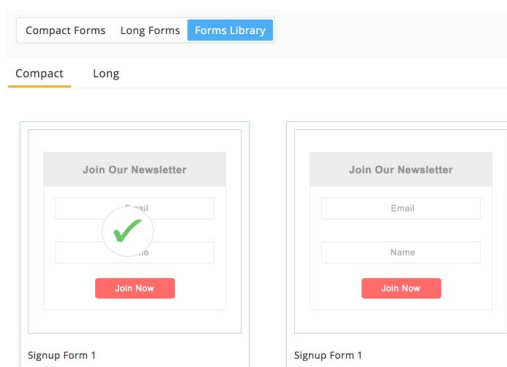
Long forms

If your website or company need more information than a bare-bones signup form will provide, our advanced signup forms can be customized to suit your brand.



Forms library

This is a repository from where you can choose a signup form from the already saved ones.





Note: To create more signup forms, click *Create Form* in the top-right corner.

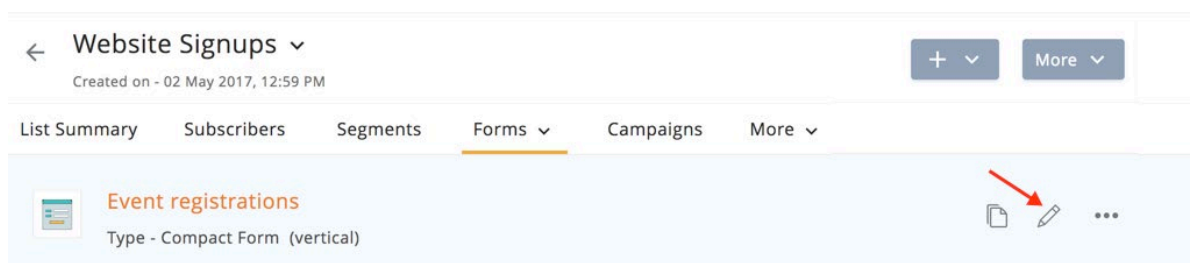
After you select a signup form template based on your requirements, we'll move on to the next topic: customizing a signup form that resonates with your brand.

Customize signup form

From the customization screen, you can design the overall look of your signup form. In this section, we'll go over various levels of customization, including editing fields, adding a logo, adding background images, changing colors, font styles, adding a CAPTCHA, and more.

To customize your signup form:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired Mailing List.
- 3) Click Signup Form Tools and select Forms.
- 4) Click the Edit icon that corresponds to the signup form you want to customize.



Navigate through the form to edit the following:

Customize Fields - Customize or add new fields to ask contacts for more information.


Add Special Elements – Add your privacy policy, lists, and CAPTCHA.

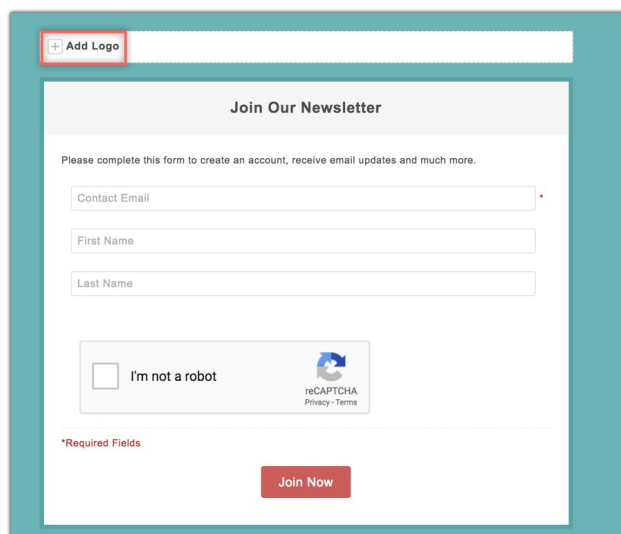
Customize Layout - Add your logo, customize colors, and change the font style.

Add custom fields

Any extra contact information can be collected through custom fields. These fields may be used to collect anything you choose, including phone numbers, gender information, diet, and political affiliation.

To add custom fields:

- 1) Toggle the switch present in the top-left corner to Fields.
- 2) Click  next to Customize Field to add a custom field.



The image shows a preview of a newsletter sign-up form. At the top left, there is a button labeled "Add Logo" with a plus icon, which is highlighted with a red box. The form title is "Join Our Newsletter". Below the title, there is a sub-header: "Please complete this form to create an account, receive email updates and much more." The form contains three input fields: "Contact Email", "First Name", and "Last Name". Below these fields is a reCAPTCHA widget with the text "I'm not a robot" and a checkbox. At the bottom of the form, there is a red "Join Now" button. A small asterisk and the text "*Required Fields" are located above the "Join Now" button.

3) Now, a pop-up called Add Custom Fields will appear. Fill in the following information:

Display Label - Give a name to the custom field.

Field Length - Give the length of the field.

4) Click Save to confirm.

Edit Field:

1) Toggle the switch in the top-left corner to Fields.

2) Click the Settings icon on the left of each field by hovering over the field.

The image shows a 'Join Our Newsletter' form within a teal-bordered pop-up window. In the top-left corner of the pop-up, there is a small red-bordered button with a plus sign and the text 'Add Logo'. The form itself has a title 'Join Our Newsletter' and a sub-header 'Please complete this form to create an account, receive email updates and much more.' Below this are three input fields: 'Contact Email', 'First Name', and 'Last Name'. At the bottom of the form, there is a checkbox labeled 'I'm not a robot' next to a reCAPTCHA logo and the text 'reCAPTCHA Privacy - Terms'. A red asterisk and the text '*Required Fields' are positioned above a red 'Join Now' button at the very bottom of the form.

3) The Field Properties pop-up will appear, which displays the following elements:

Field Name – The name of the field.

Field Title – The title of the field that will be displayed to contacts. Make sure you give a name that helps contacts understand the purpose of the field easily.

Mark as required field – Choose whether to make a field mandatory for contacts to fill in.

Mark as hidden field – When a contact tries to sign up through a form, the hidden fields auto-fill themselves. Later, you can filter the contacts based on hidden field and create segments to target a set of contacts.

Add logo

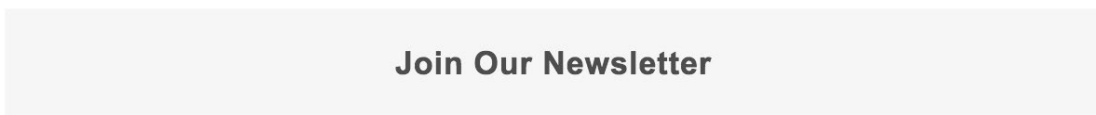
You can add the company logo to your signup form. If you are sharing your signup form on Twitter, this may help your contacts easily recognize your brand.

To add logo:

- 1) Click on Add Logo in the signup form. The Image Gallery pop-up will appear, where you can either choose a file from the recently uploaded images or from your image library.
- 2) Click Upload on the top-right corner of the pop-up to upload new images to the image library.
- 3) Choose an image file from your computer, then click Add.

Edit/Delete logo

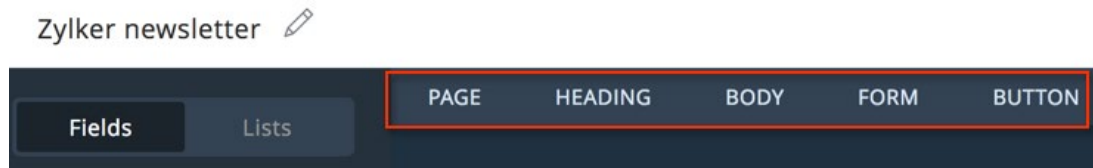
- 1) To edit a logo, click the Change link located below the logo.
- 2) To delete a logo, click the Delete link located below the logo.



Note: The maximum size for the image is 1024 x 1024 pixels. The maximum file size is 1MB, and supported image file types are *.png, *.jpg, *.Jpeg, *.gif, *.bmp.

Customize layout

Customize your signup form using design tools. You can change the font type, font color, or size.



Page

Background Color – Add color to the page’s background to complement the rest of your page.

Font – Edit the font type and color.

Padding - Increase and decrease the space between the page border and content body by adjusting the pixel padding.

Background Image - Instead of a background color, you may choose to have a background image.

Heading

Background Color – Add a background color to the heading of your signup form.

Font – Edit the font style and color.

Padding - Increase and decrease the space between the page border and content body by adjusting the pixel padding.

Border – Add or remove a border, increase or decrease the border thickness, and customize the border as solid, dotted, or dashed.

Body

Background Color – Add a background color to the signup form body.

No Fill – If you don't want a background color, click the No Fill icon.

Padding - Increase and decrease the space between the page border and content body by adjusting the pixel padding.

Font – Edit the font type and color for the body text.

Border - Add or remove a border, increase or decrease the border thickness and customize the border as solid, dotted, or dashed.

Form

Field Color – Change the background color for your fields.

Field Title – Change the field title's font size, style, and color.

Field Text - Change the field text's font size, style, and color.

Field Border – Customize the border thickness, color, and style.

Required Text – This is the privacy policy at the foot of your signup form. You can decide the text color, font size, and style.

Button

Font - Edit the body text font type and color.

Border - Customize the border thickness, color, and style.

Border Radius –Change the button's area and corners.

Padding Right and Left - Increase and decrease the space on the sides of your button.

Padding Top and Bottom - Increase and decrease the space on top and bottom of your button.

Logo

Align the logo to the left, right, or center, as well as increase or decrease the logo size with the elements provided.

Add special elements

The Add Special Elements option is located below the Field Customization option.

The following options are available:

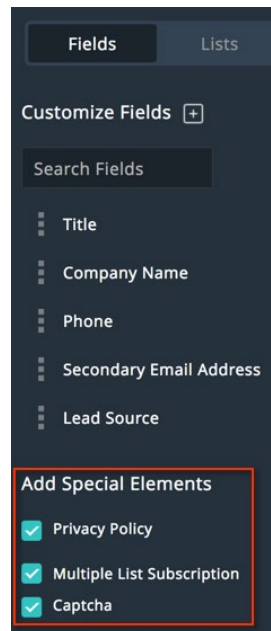
Privacy policy-The privacy policy will be included by default. You can edit the message or remove the privacy policy entirely.

Multiple list subscription-Multiple list subscription lets contacts join other mailing lists via the signup form you have created. All you have to do is just link the mailing lists in the signup form.

Follow the below steps to do this.

- 1) Toggle the switch present at the top-left corner to Lists.
- 2) Enable the option Multiple List Subscription under Add Special Elements.
- 3) Drag and drop the desired mailing lists onto the form.

Captcha-Captchas are twisted words that block automated entries from spam-bots. Currently, Captcha is the best way to distinguish a human from a machine.



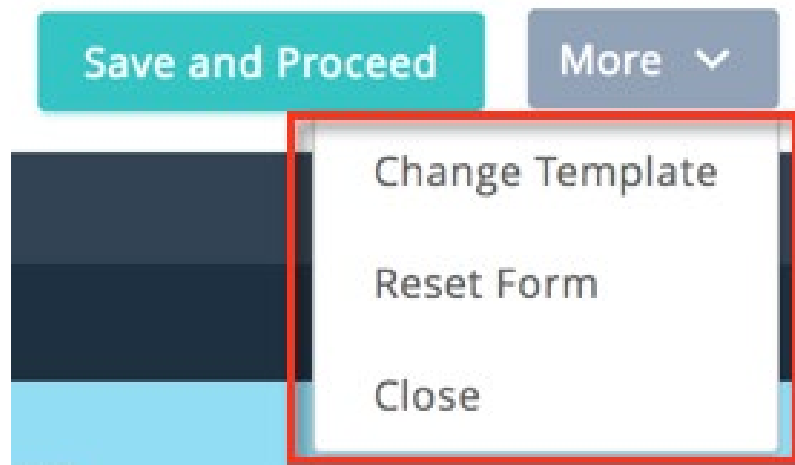
Note: *We recommend turning on the captcha feature to prevent spam-bots from filling out your signup form.*

More options

Preview form-Click the Preview button located at the top of the customization page to see a preview of your signup form.

Change template-Click More in the top-right corner and select Change Template from the dropdown options.

Reset form-Click More and select Reset Form to reframe the form from the beginning. Doing this will cause you to lose any and all the saved edits to the form. Click Save and Proceed once you are done with the customization to continue to the next process.



Adding thank you pages and response emails

When a visitor submits information through a signup form, they will be redirected to a 'thank you' page. You can customize this page, or use a default thank you page.

In this section, you will learn how to design and host your own thank you page, and customize your autoresponder content.

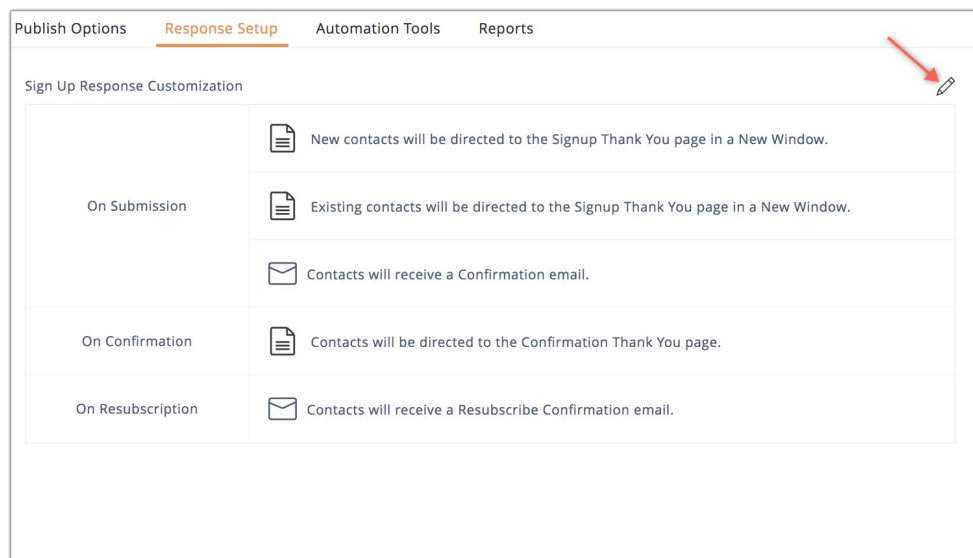
To navigate to the response setup signup form:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired mailing list.
- 3) Click Signup Form Tools and select Forms.
- 4) Click the Edit icon that corresponds to the signup form you want to customize.



5) Go to the Response Setup.

6) Select Edit icon to set the response messages and emails.



Signup Thank You page

Thank your contacts when they sign up to your newsletters. Make use of our default Thank You page, redirect contacts to a URL, or provide an inline message. You can also customize your Thank You page content.

The response can be page can be customized with an option to open in the same window, new window, or as an inline popup with a small, customized browser message.

Design your thank you page

1. Select Contacts from the Navigation bar and choose Mailing Lists.
2. Select the desired mailing list.
3. Click Signup Form Tools and select Forms.
4. Click the Edit icon that corresponds to the signup form you want to customize.
5. Go to the Response Setup.
6. Select Edit icon to set the response messages and emails.
7. Click the Signup thank you page.

You can use the Zoho Campaigns default thank you page or modify it to requirements. You can use the Zoho Campaigns default thank you page or modify it to requirements. To edit the page, follow these steps:

- 1) Click the Customize link corresponding to confirmation email. A Thank You Page - Customization pop-up will appear.
- 2) Scroll down to the confirmation email template, select any content to customize it.
- 3) Click Save.

Set up your thank you pages and emails

Signup thank you page ← Choose a response you would like to show to your contacts on form submission.

Confirmation email

Confirmation thank you page

Resubscribe email

Open response in:

For New Contacts For Existing Contacts

Select response type : Thank You page Redirect to another URL

Welcome to ##COMPANYNAME##

You have successfully subscribed to our organization.
We have sent a confirmation link to your email address. Please confirm your subscription via the same to start receiving our latest newsletters and other updates.

→

Add logo

Click Upload to add a logo from your recently uploaded images, or from your image gallery.



Note: *Maximum image size is 1024 x 1024 pixels. Maximum file size is 1MB and supported image file types are *.png, *.jpg, *.jpeg, *.gif, and *.bmp.*

Page

Background Color – You can add background color to complement your page.

Padding - You can increase and decrease the space between the page border and the body text by adjusting the pixel padding.

Heading - Here, you can edit the font style, size, and color.

Body

Background Color – Add background color to the signup form body.

Border - Add or remove a border, increase or decrease the border thickness and customize the border as solid, dotted, or dashed.

Padding - Increase or decrease the space between the page border and body text by adjusting the pixel padding.

Font – Edit the body text font style, size, and color.

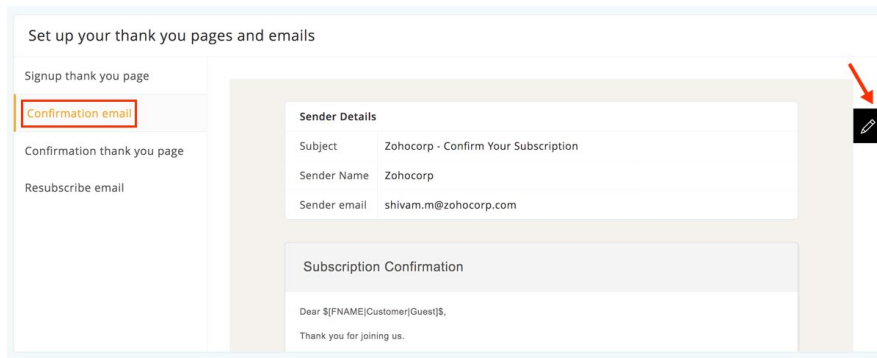
Redirect to a custom URL – Redirect the contacts to a different URL and show them your personalized thank you message.

Confirmation email

When contacts sign up with their email address, an email is sent to the address they signed up with. This email includes a button for the contacts to click in order to authenticate their email address.

To customize the confirmation email:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired mailing list.
- 3) Click Signup Form Tools and select Forms.
- 4) Click the Edit icon that corresponds to the signup form you want to customize.
- 5) Go to the Response Setup.
- 6) Select Edit icon to set the response messages and emails.
- 7) Click the Confirmation email.
- 8) Click the Customize link corresponding to confirmation email. A Confirmation Email - Customization pop-up will appear.
- 9) Scroll down to the confirmation email template, select any content to customize it.
- 10) Click Save.



Confirmation Thank You page

You can send contacts to a thank you page for their confirmation as well. Again, you can either make use of a default page or redirect the contact to another URL.

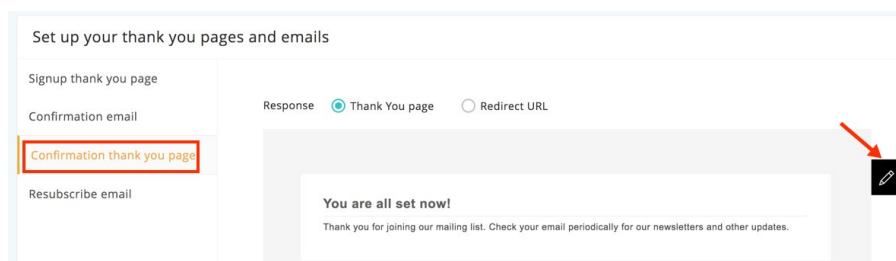
The response can be page can be customized to show up as a thank you page or as an inline popup with a small, customized browser message.

Design your confirmation thank you page

1. Select Contacts from the Navigation bar and choose Mailing Lists.
2. Select the desired mailing list.
3. Click Signup Form Tools and select Forms.
4. Click the Edit icon that corresponds to the signup form you want to customize.
5. Go to the Response Setup.
6. Select Edit icon to set the response messages and emails.
7. Click the Confirmation thank you page.

You can use the Zoho Campaigns default thank you page or modify it to requirements. To edit the page, follow these steps:

- 1) Click the Customize link corresponding to confirmation email. A Thank You Page - Customization pop-up - Customization pop-up will appear.
- 2) Scroll down to the confirmation email template, select any content to customize it.
- 3) Click Save.



Add Logo – Click the Upload button to add a logo from your recently uploaded images, or from your image gallery. You can also upload the image from your computer by clicking the Upload from Computer.



Note: *Maximum image size is 1024 x 1024 pixels. Maximum file size is 1MB .The supported file types are *.png, *.jpg, *.jpeg, *.gif, and *.bmp.*

Page

Background Color – Add background color to the signup form body.

Padding - Increase or decrease the space between the page border and body text by adjusting the pixel padding.

Heading - Edit the heading text font style, size, and color.

Body

Background Color – Add background color to the signup form body.

Border - Add or remove a border, increase or decrease the border thickness and customize the border as solid, dotted, or dashed.

Padding - Increase or decrease the space between the page border and body text by adjusting the pixel padding.

Font – Edit the body text font style, size, and color.

Redirect to a custom URL – In this case, you can configure a page URL so that the subscriber gets landed to a landing page after sign up confirmation.

Resubscribe email

When a contact has previously unsubscribed from your newsletter and wants to resubscribe, an email is sent to the address they've provided. This email will include a button for the contact to click in order to confirm their resubscription.

To customize the resubscribe email:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired mailing list.
- 3) Click Signup Form Tools and select Forms.
- 4) Click the Edit icon that corresponds to the signup form you want to customize.

- 5) Go to the Response Setup.
- 6) Select Edit icon to set the response messages and emails.
- 7) Click the Resubscribe email.
- 8) Click the Customize link corresponding to confirmation email. A Confirmation Email - Customization pop-up will appear.
- 9) Scroll down to the confirmation email template, select any content to customize it.
- 10) Click Save.

Set up your thank you pages and emails

Signup thank you page

Confirmation email

Confirmation thank you page

Resubscribe email

Sender Details

Subject Resubscribe confirmation - Zohocorp

Sender Name Zohocorp (Same as Signup Confirmation Email)

Sender email shivam.m@zohocorp.com (Same as Signup Confirmation Email)

Confirmation Email

Hello \${FNAME|Customer|Guest}\$,

You have shown interest in resubscribing to our newsletters. We would like you to confirm the same with the button below.

Resubscribe

If you find trouble with the link, please copy paste the following link in your browser.

##CONFIRMATION_URL##

Thank You,

##COMPANYNAME##

Once you set up the response messages, click Save and Proceed to the next step.

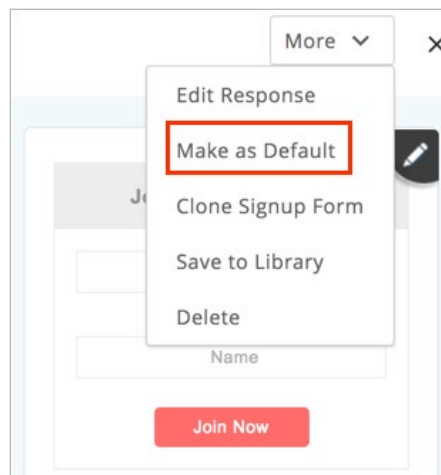
Make a signup form default to a mailing list

Default signup forms are provided in the Subscribe link located in the email marketing footer of the campaigns you send. It helps email recipients signup to the respective mailing list via this subscribe link.

The first form you associate to a mailing list acts as the default signup form.

To change the default signup form for a mailing list:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired Mailing List.
- 3) Click Signup Form Tools and select Forms.
- 4) Select the desired signup form.
- 5) Select the More icon in the top-right corner and click Make as Default.



Note: A mailing list must have a default signup form. The first form you associate to a mailing list acts as the default signup form.

If you don't assign a signup form to a mailing list, it will have a default form that Zoho Campaigns uses.

A signup form that is the default for a mailing list cannot be associated to a different mailing list unless and until you associate a different form as default to that mailing list.

Publish your signup form

This is the final phase of the signup form creation process. By this point, you have customized your form and relevant thank you pages.

We provide some options to share your signup form, including embedding it on your website, sharing it on social networking sites, posting a direct URL, and including a signup form for our WordPress users, etc.

To publish your signup form:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired Mailing List.
- 3) Click Signup Form Tools and select Forms.
- 4) Click the Signup Form, you want to publish.
- 5) Click Publish Options.

Website code

This is a conventional way to add signup forms to your website. Just copy the generated code and paste it wherever you want the signup form displayed on your website.

The screenshot shows the 'Publish Options' tab selected in a navigation bar. Below the navigation bar, there are tabs for 'Response Setup', 'Automation Tools', and 'Reports'. The main content area is titled 'Choose a way to publish your signup form online.' and includes a 'Customize Tracking Text' and 'Preview' link. On the left, a list of publishing options is shown, with 'Website Code' highlighted. The right side of the interface displays the generated code for the 'Website Code' option, with a 'Copy to Clipboard' button and a 'Responsive' toggle set to 'on'.

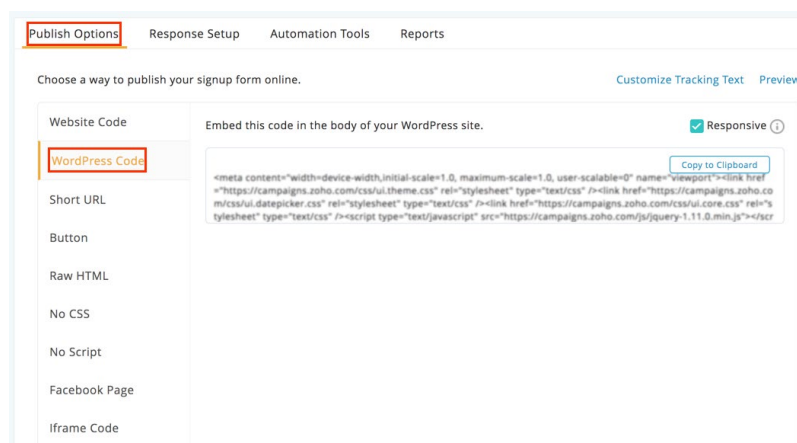
Signup form for WordPress users

The Zoho Campaigns plugin for WordPress allows your blog visitors to subscribe to a mailing list. Your signup forms can be embedded in your website/blog with just a short bit of code.

Including header to website's header.php – For WordPress users

If you have a WordPress-based website, you'll need to add the script part of your signup form code into the header section of your website for your signup form to work properly.

“To use JavaScript repeatedly within your site, you can either set the call for the JavaScript, or the script itself, in the head of your header.php template file, between the meta tags and the style sheet link, no differently than you would if you were using JavaScript in any HTML page. “

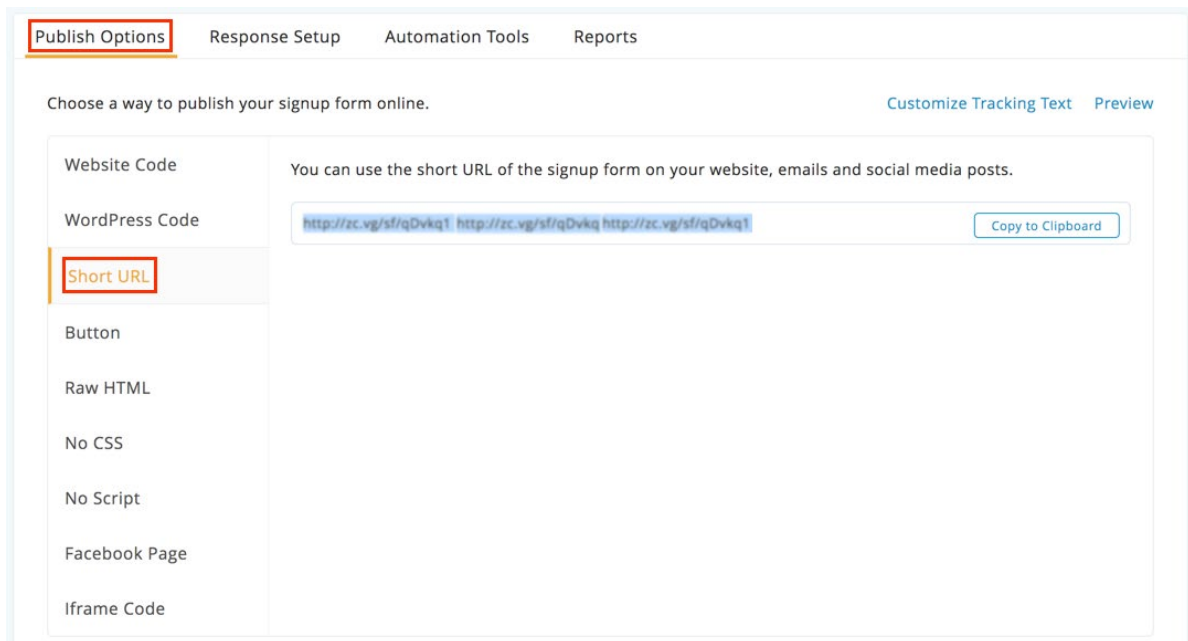


The screenshot shows the 'Publish Options' tab in the Zoho Campaigns interface. The 'WordPress Code' option is selected in the left sidebar. The main area displays the embed code for the signup form, which is responsive. A 'Copy to Clipboard' button is visible next to the code.

```
<meta content="width=device-width,initial-scale=1.0,maximum-scale=1.0,user-scalable=0" name="viewport"><link href="https://campaigns.zoho.com/css/ui.theme.css" rel="stylesheet" type="text/css" /><link href="https://campaigns.zoho.com/css/ui.datepicker.css" rel="stylesheet" type="text/css" /><link href="https://campaigns.zoho.com/css/ui.core.css" rel="stylesheet" type="text/css" /><script type="text/javascript" src="https://campaigns.zoho.com/js/jquery-1.11.0.min.js"></script>
```

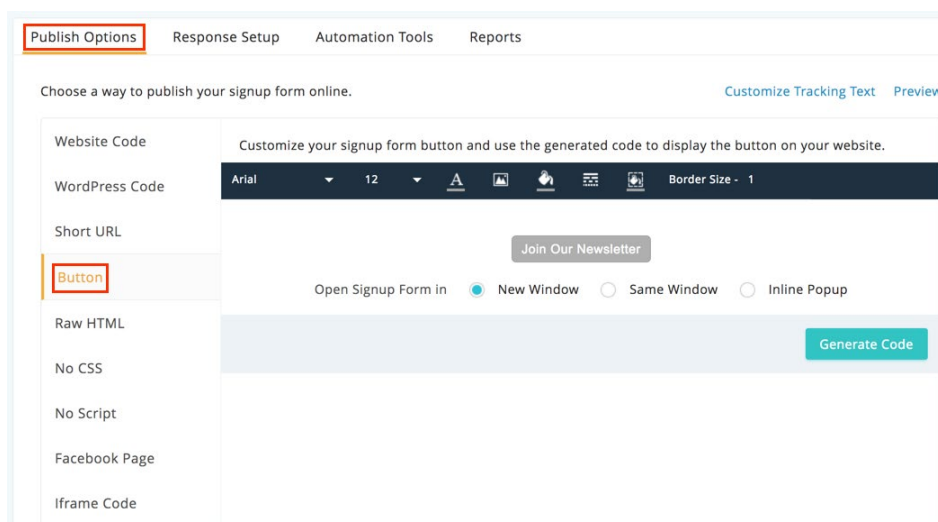
Short URL

This is a direct URL for your signup form that can be shared on social networking sites such as Facebook, Twitter and LinkedIn. Once a visitor clicks your link, they will be taken to the signup form.



Signup button

A simple way to signup to a mailing list is through Call-to-Action button which is widely used in event registrations, seminars, tradeshow, conferences and webinar.



Raw HTML

Raw HTML is the basic HTML code that does not contain CSS or JavaScript. You can customize the code to your requirements.

Publish Options Response Setup Automation Tools Reports

Choose a way to publish your signup form online. [Customize Tracking Text](#) [Preview](#)

Website Code	<p>Raw HTML gives you the signup code form with no CSS and no JavaScript.</p> <pre> <table width="250" border="0" cellspacing="0" cellpadding="0" align="center" name="SIGNUP_FORM"> <tbody> <tr> <td align="center" valign="top"> <div id="SIGNUP_HEADING" name="SIGNUP_HEADING" changeid="SIGNUP_MSG" changetype="SIGNUP_HEADER">Join Our Newsletter</div> <div style="position:relative; top: 30px;"> </pre> <p>Note: Raw HTML doesn't include the following options in the signup form.</p> <ol style="list-style-type: none"> 1. Form design from Zoho Campaigns 2. Captcha 3. Tracking 4. Multiple List Subscription 5. Date Field 6. Multiselect Checkbox
WordPress Code	
Short URL	
Button	
Raw HTML	
No CSS	
No Script	
Facebook Page	
Iframe Code	

No CSS

Embedding a No CSS code for your signup form will not have any form of design that is provided by Zoho Campaigns. You can however modify the code to your requirements.

Publish Options Response Setup Automation Tools Reports

Choose a way to publish your signup form online. [Customize Tracking Text](#) [Preview](#)

Website Code	<p>This is the signup form code with no CSS. Embed it in your website and modify it to your needs.</p> <pre> <!--Zoho Campaigns Web-Optin Form Starts Here--> <script type="text/javascript" src="https://campaigns.zoho.com/jquery-1.11.0.min.js"></script> <script type="text/javascript" src="https://campaigns.zoho.com/jquery-migrate-1.2.1.min.js"></script> <script type="text/javascript" src="https://campaigns.zoho.com/js/ui.datepicker.js" charset="utf-8"></script> <script type="text/javascript" src="https://campaigns.zoho.com/jquery.form.js"></script> <script type="text/javascript" src="https://campaigns.zoho.com/js/optin_min.js"></script> <script type="text/javascript"> </pre> <p>Note: This code doesn't include the form design from Zoho Campaigns.</p>
WordPress Code	
Short URL	
Button	
Raw HTML	
No CSS	
No Script	
Facebook Page	
Iframe Code	

No JavaScript

Embedding a No JavaScript code for your signup form will not include CAPTCHA, tracking code, multiple list subscription, and date field in your signup form.

The screenshot shows the 'Publish Options' tab in Zoho Campaigns. The left sidebar has 'No Script' selected. The main content area displays the following HTML code:

```

<!--Zoho Campaigns Web-Optin Form Starts Here-->
<link href="https://campaigns.zoho.com/css/ui.theme.css" rel="stylesheet" type="text/css" />
<link href="https://campaigns.zoho.com/css/ui.core.css" rel="stylesheet" type="text/css" />
<meta content="width=device-width,initial-scale=1.0, maximum-scale=1.0, user-scalable=0" name="viewport">
<style>
*** RESPONSIVE START **

```

Below the code, a note states: "This code doesn't include the following options in the signup form." followed by a list:

1. Captcha
2. Tracking
3. Multiple List Subscription
4. Date Field
5. Multiselect Checkbox

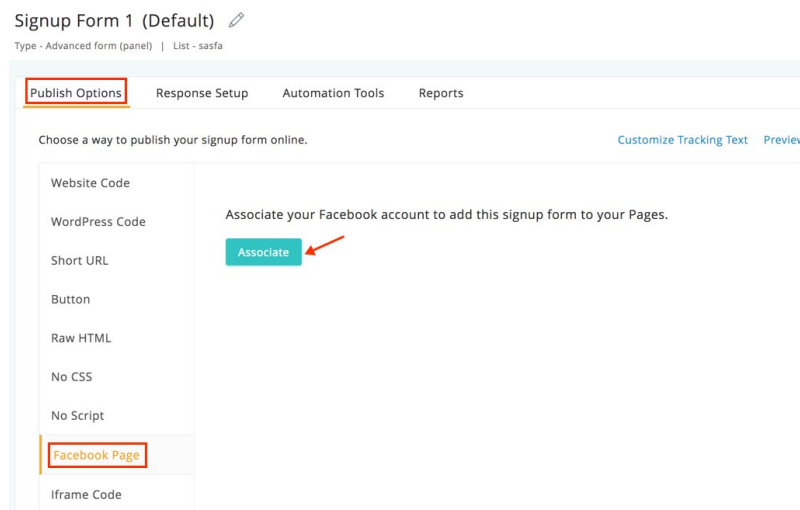
Signup form for Facebook users

If your Facebook page has been integrated with Zoho Campaigns, you can embed the signup form as a tab in your Facebook page. This way, your fans and visitors can sign up and be added to your Zoho Campaigns mailing lists.

To add a signup form on your Facebook page:

- 1) Select Contacts from the left panel and click Manage Lists.
- 2) Select a Mailing List, then click Signup Forms.
- 3) Click the More icon that corresponds to the Signup Form you want share.
- 4) Click Associate.
- 5) Select your Facebook account page from the dropdown menu.
- 6) Click Save and Publish.

The signup form will be published on your Facebook page. You can view the form by clicking Visit my Facebook Page.



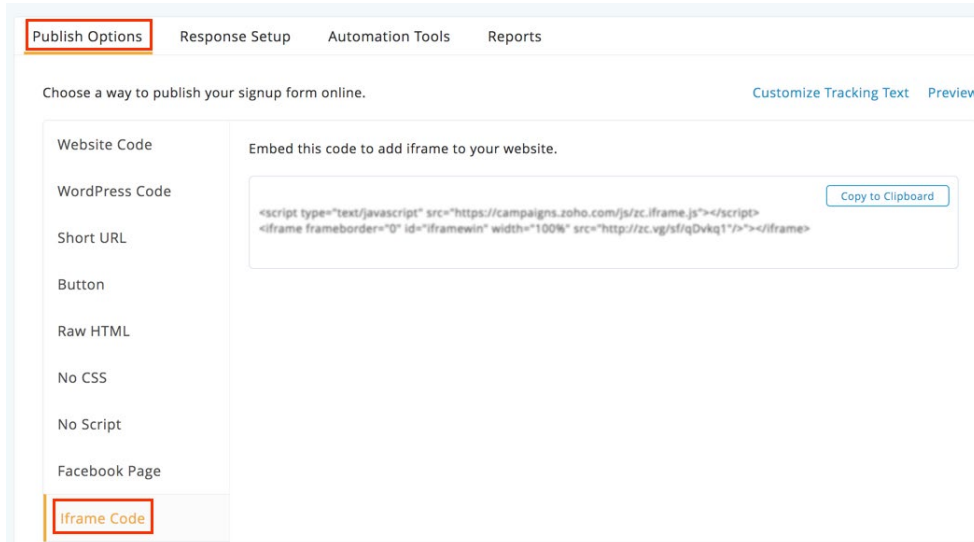
Publish signup form through iframe

If you are not interested in embedding the JavaScript code, we do provide the option to publish your signup form through iframe. An iframe is an HTML section embedded within another HTML section of a webpage.

To embed the iframe code:

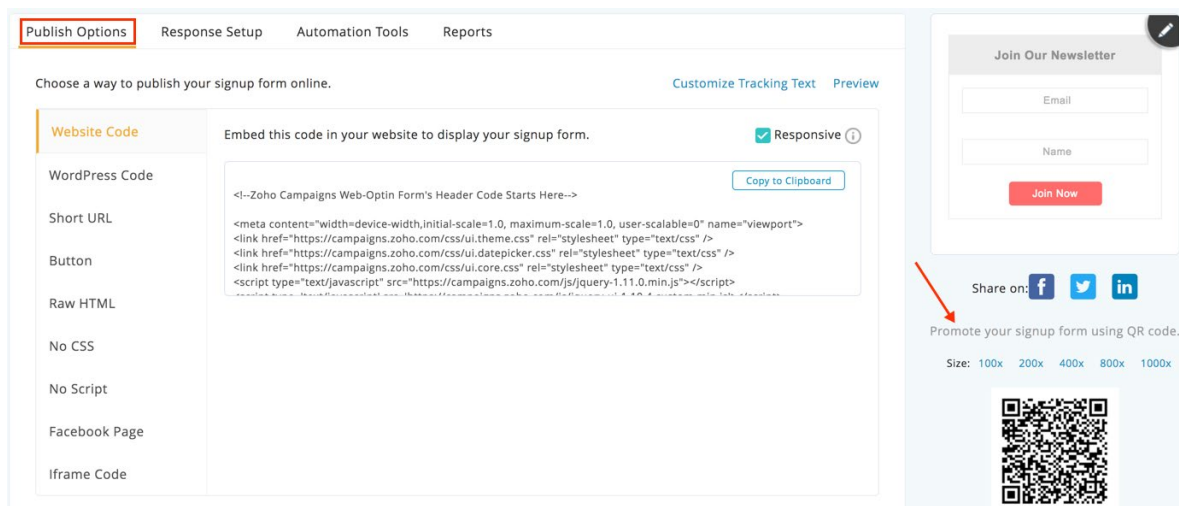
- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the Mailing List you want to use, then click Signup Forms.
- 3) Click the More icon that corresponds to the Signup Form, you want to embed.
- 4) Select Get Code and click iFrame Code
- 5) Copy the iframe code and paste it into your website's HTML. Make sure to adjust the form's width and height dimensions before publishing it to your website.

Once, the signup form code has been added, you can view the signup form on your website.



QR code

A simple and quick way to take your contacts to signup form. A contact needs a smartphone and the QR code scan app to scan this matrix barcode and access the signup form.



Associating Automation tools for your Signup Form

The automation tools are an advanced option to push contacts joining via the signup form to different entities. All you have to do is associate the entity to your signup form, by following the steps below:

1) Push to Workflow

Associate a workflow to your signup form to perform a lot of different actions on the contacts joining via this signup form. Once associated, contacts will automatically be pushed to the workflow and the specified actions will take place.

User Scenario:

Mia runs an e-learning site that offers courses like French, German, Japanese. She creates a signup form for each of the courses and wishes to offer the French learning contacts with a few additional learning materials for the current month. Let us look how workflow helps her do this.

Mia creates an activity-based workflow and associates it to the the signup form created for the French course. This activity-based workflow assigns the tag "French Contacts_offer" with the lead score of 10 to every contact coming in that month.

Follow the below steps to carry the process out:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired Mailing List.

- 3) Click Signup Form Tools and select Forms.
- 4) Select the desired signup form.
- 5) Click Automation Tools and select Push to Workflow.
- 6) Click Associate Workflow and select the desired activity-based workflow from the dropdown list to associate to the signup form.
- 7) Click Associate.



Note: *You can have one workflow associated to the signup form, at a time.*

Disable Workflow

You can pause a workflow when you don't need the actions specified to take place on the contacts.

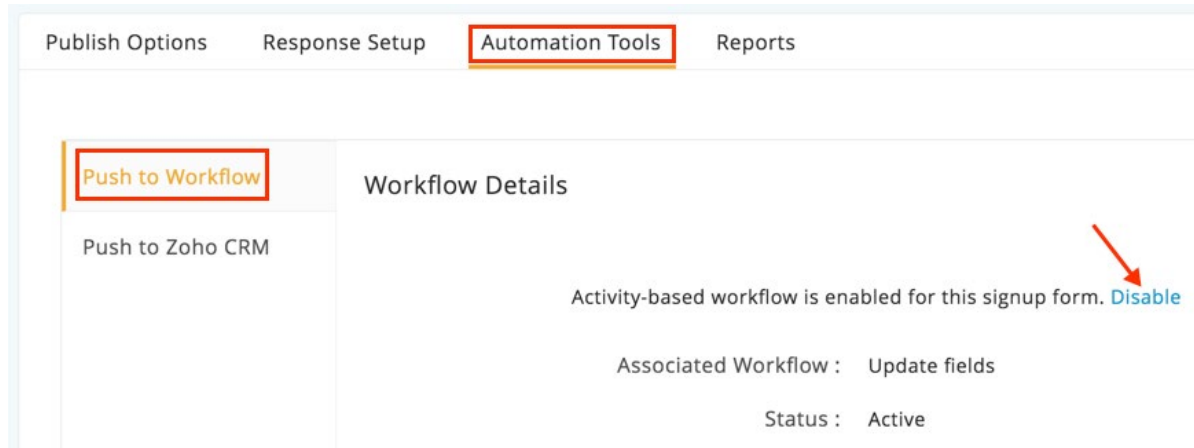
To pause the workflow:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired Mailing List.
- 3) Click Signup Form Tools and select Forms.

Select the desired signup form.

Click Automation Tools and select Push to Workflow.

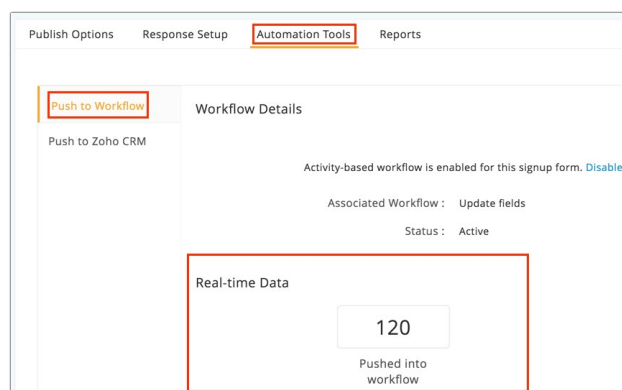
Click the Disable link in the Workflow Details section.



Check out Workflow Reports

You can learn how many contacts have been pushed into the workflow by following the below steps:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired Mailing List.
- 3) Click Signup Form Tools and select Forms.
- 4) Select the desired signup form.
- 5) Click Automation Tools and select Push to Workflow.
- 6) Check the section Real-time data to know the contacts that were pushed into the workflow.



2) Push to Zoho CRM

This option enables you to push the contacts joining via this signup form to your CRM account and store them as a contact or a lead. Before pushing your campaign status to CRM, make sure you have created a text area field exclusive for Campaigns status in contacts or Leads module.

To associate your CRM account:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired Mailing List.
- 3) Click Signup Form Tools and select Forms.
- 4) Select the desired signup form.
- 5) Click Automation Tools and select Push to Zoho CRM.
- 6) Click Configure Mapping and select the action you want to perform.
- 7) Click Save.

The screenshot shows the Zoho Campaigns interface. At the top, there are four tabs: 'Publish Options', 'Response Setup', 'Automation Tools', and 'Reports'. The 'Automation Tools' tab is highlighted with a red box. Below the tabs, there is a section titled 'Push to Workflow'. Under this section, there is a button labeled 'Push to Zoho CRM', which is also highlighted with a red box. To the right of this button, there is a text area that says 'Push subscribers joining via this signup form to Zoho CRM.' Below this text area, there is a dropdown menu labeled 'Perform action :'. The dropdown menu is open, showing the option 'Update existing and push new subscribers.' with a downward arrow. Below the dropdown menu, there are two buttons: 'Save' (in teal) and 'Cancel' (in grey).

To configure mapping:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired Mailing List.
- 3) Click Signup Form Tools and select Forms.
- 4) Select the desired signup form.
- 5) Click Automation Tools and select Push to Zoho CRM.
- 6) Click Configure Mapping.
- 7) Select the CRM account and module and the respective fields to push the contacts details.
- 8) Click Save.

Push To Zoho CRM

Select CRM account and module.

patricia.boyle Contacts

Map your fields

Contact Email Email

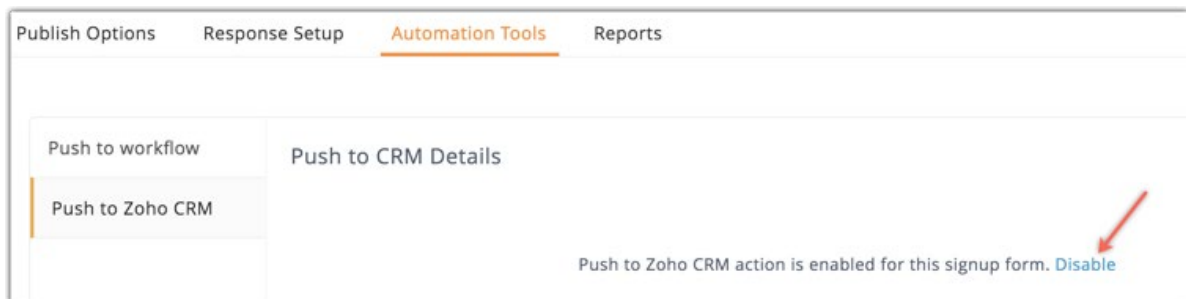
Last Name Last Name +

Save Cancel

Disable Push to Zoho CRM

You can pause the action for a certain period when you do not need to push the contacts to CRM. To pause the action:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired Mailing List.
- 3) Click Signup Form Tools and select Forms.
- 4) Select the desired signup form.
- 5) Click Automation Tools and select Push to Zoho CRM.
- 6) Click the Disable link in the Push to CRM Details section.



Check out Push to CRM Reports

You can learn how many contacts have been pushed to Zoho CRM by following the below steps:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired Mailing List.
- 3) Click Signup Form Tools and select Forms.
- 4) Select the desired signup form.
- 5) Click Automation Tools and select Push to Zoho CRM.
- 6) Check the section Real-time data to know the contacts that were pushed to the CRM modules.

Push to Workflow

Push to Zoho CRM

Push to CRM Details

Push to Zoho CRM action is enabled for this signup form. [Disable](#)

Perform action : Update existing and push new subscribers.

[View Mapping](#)

Real-time Data

135	0
Pushed to Zoho CRM	Skipped

Signup Form Reports

Insights and analysis

You can view the number of visitors who have submitted and confirmed their subscription. The following data is represented in the form of a doughnut chart:

Form Views – Number of visitors who have visited pages embedded with your signup form.

Submitted Contacts – Number of Contacts who have submitted their data via your signup form but haven't confirmed their subscription yet.

Confirmed Contacts – Number of contacts who have confirmed their subscription and have been added as contacts to your mailing list.

Button Views – Number of contacts who have seen your signup button rather than the direct signup form.

Top five signup locations

This tells you where the majority of your signups come from by region/country. Location details can be useful for targeting your marketing campaigns at a specific locality. It also helps you segment your mailing lists much more precisely.

Recently confirmed contacts

This is a list of recently confirmed contacts for a particular signup form. This report lets you see the status of your new contacts.

Tracking text stats

You can add unique tracking text into your signup form to monitor a web page or blog. This helps you view reports based on the number of visits to a signup form page and analyze which page is has been visited the most.

This data is represented in the form of a doughnut chart.

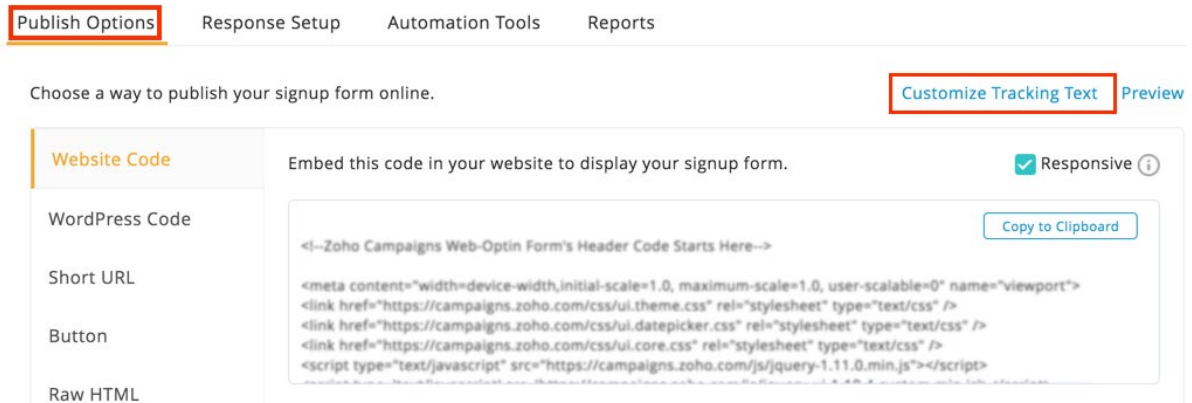
Customize tracking text

To add tracking text in the signup form:

- 1) Select Contacts from the Navigation bar and choose Mailing Lists.
- 2) Select the desired Mailing List.
- 3) Click Signup Form Tools and select Forms.

4) Select the desired signup form.

5) In the Publish Options page, click Customize Tracking Text. A popup will appear.



6) Click Add New Text to enter a tracking name.

7) Click Save to confirm.

Customize Tracking Text

Tracking Text generates statistics on user behavior for your Signup form. [Learn How](#)

[Map tracking text to field](#)

Text	Status
<input type="text" value="HomePage"/> (Default Text)	<input checked="" type="checkbox"/>
<input type="text" value="LogoutPage"/> (Default Text)	<input checked="" type="checkbox"/>
<input type="button" value="Add new text"/>	

Alternate method:

1) In the Signup form Reports page, click Customize Tracking Text. A popup will appear.

- 2) Click Add New Text to enter a tracking name.
- 3) Click Save to confirm.

Once the tracking text has been added successfully, you can generate a signup form and code embed it on the signup page.

Map your field

Once you create the tracking text, you can map it to a custom field in your mailing list. You can then create a segment to filter the contacts coming from a particular web page/blog and send an email campaign to those contacts.

To map tracking text to a contact field:

- 1) From the right side of the Tracking Code page, click Map Text to Field.
- 2) Select a Field Name from the dropdown menu.
- 3) Click Save to confirm.

Customize Tracking Text

Tracking Text generates statistics on user behavior for your Signup form. [Learn How](#)

Map tracking text to field ⓘ

Text	Status
<input type="text" value="HomePage"/> (Default Text)	■
<input type="text" value="LogoutPage"/> (Default Text)	■
Add new text	

Sign up from Facebook

You can track visitors that have subscribed through the signup form on your Facebook page.

Form Views – Number of visitors who have visited your signup form.

Submitted Contacts – Number of contacts who have submitted their data via signup form but haven't confirmed their subscription yet.

Confirmed Contacts – Number of contacts who have confirmed their subscription and have been added as contacts to mailing list.

Sign up from WordPress

If you have added a signup form to your WordPress site, you can track the subscription status from your Zoho Campaigns account. You can view the following data under WordPress Reports.

Form Views – Number of visitors who have visited your signup form.

Submitted Contacts – Number of contacts who have submitted their data via signup form but haven't confirmed their subscription yet.

Confirmed Contacts – Number of contacts who have confirmed their subscription and have been added as contacts to mailing list.

Untracked Reports

Some marketers prefer to manually edit the signup form tracking code to embed in their webpage. In this case, the tracking text would not be entered in the signup form reports.

For these cases, we provide these reports based on untracked signup forms:

Form Views – Number of visitors who have visited your signup form.

Submitted Contacts – Number of contacts who have submitted their data via signup form but haven't confirmed their subscription yet.

Confirmed Contacts – Number of contacts who have confirmed their subscription and have been added as contacts to mailing list.

Helpful Tips

Add contacts to a mailing list - Always have a dedicated mailing list for contacts coming via the signup form. This will help you group your contacts in a specific mailing list rather than sending them to All Contacts.

Choose the right template - It is always good to do some homework before you select a signup form template. Look at different elements such as website complement and layout, comprehensiveness, and length before selecting a template that meets your requirements.

Include multiple lists - Always give your Contacts options about what type of information they want to receive. You can do this by including the check box for receiving more newsletters on different topics.

Email Frequency - Contacts are very conscious about how frequently they receive email newsletters. We recommend that you to mention the frequency of your email newsletter output.

Less is more – This is a simple principle to keep in mind while creating a signup form. Try to provide fewer fields to fill in, only adding them when you feel it is mandatory.

Avoid too many mandatory fields – Users often become apprehensive when entering their mobile numbers on signup forms. An ideal signup form will have fields for the user's name, email address, and city. Anything beyond this can be offputting for Contacts.

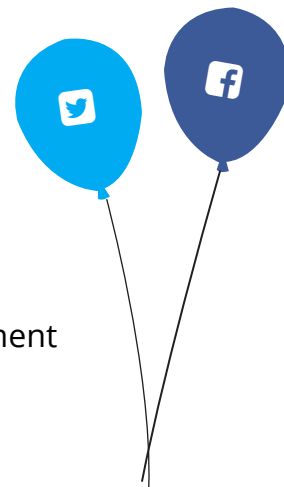
Engage Contacts after sign up - Don't limit a contact's engagement to filling out the signup form. One of the best ways to engage contacts is by redirecting them to a landing page.

Include Privacy - Contacts are wary about how you deal with their data. It is always best to have a disclaimer that you are serious about the privacy policy.

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