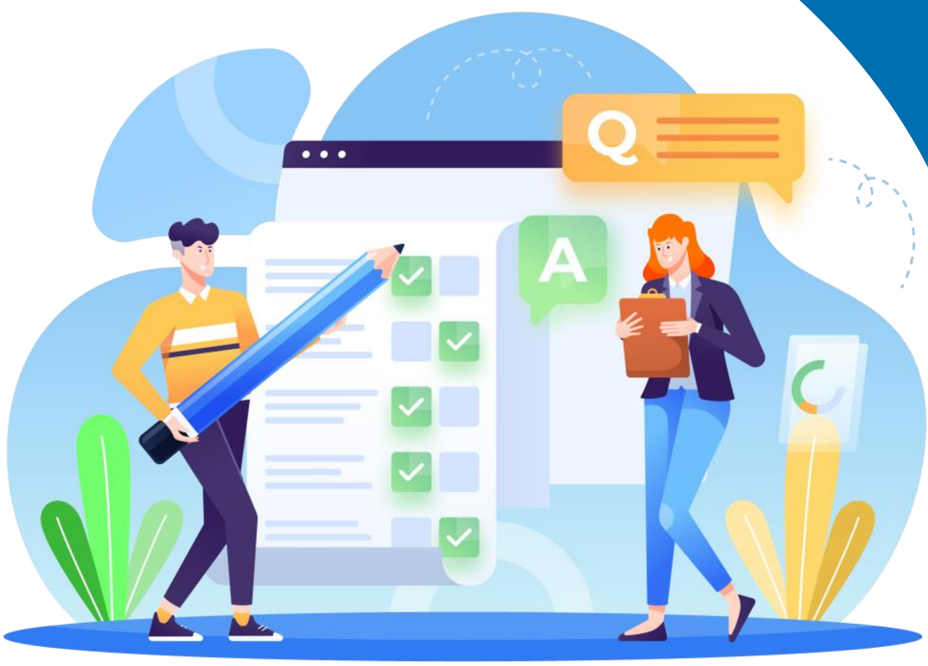
FORMS



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Description

Forms are a feature that enables the host of the event to collect information about their attendees, most often in the form of contact information. After assigning a form to a room, participants who want to join the event will be asked to fill out the form that's made up of fields previously selected by the host.

The information that's most commonly asked for is: name/surname, email, company name, contact number. After the participant fills out the form, all of the data will be available for the host to download as a CSV file.

It's possible to enable registration mode for a form. This means that each participant will receive an email with a unique URL after filling out the form, the URL is required for joining the event and cannot be transferred to anyone else.

Frequently Asked Questions

How do I create a form?

To create a form, you must be logged into your LiveWebinar account, and from the dashboard you can click on the "**Forms**" option. Creating a form can also be done while creating an event. All of this is detailed in this manual.

What does the "Enable registration mode on this form" option do?

This option is useful for when you want to provide your attendees with a unique URL for joining your event. They're useful when you're looking to see who exactly is attending your webinars and are a great tool for (as an example) building a mailing list based on the emails provided by participants. You can also use them to ask preliminary questions to help better lead your event or get to know your audience better. They can also be useful when collecting sales leads.

How many forms can I have?

The number of forms you have available is dictated by your account type.

Can I reuse one form for multiple events?

Yes, you can create different forms for different types of events and use them as you need. When creating your event, go to the "**Forms**" tab and select the correct form from the drop-down menu. This method is described **here** in this manual.

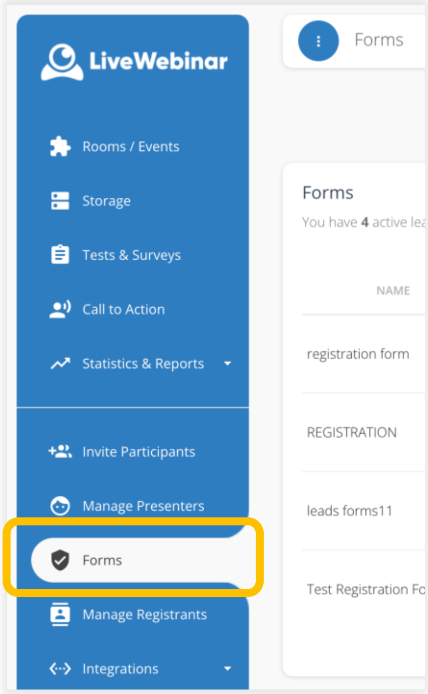
What kind of information can I ask attendees to provide?

It's best to ask your attendees for only basic information, such as their name/surname, email, company, etc. Remember to never ask your attendees to provide any sensitive information such as social security numbers or credit card information.

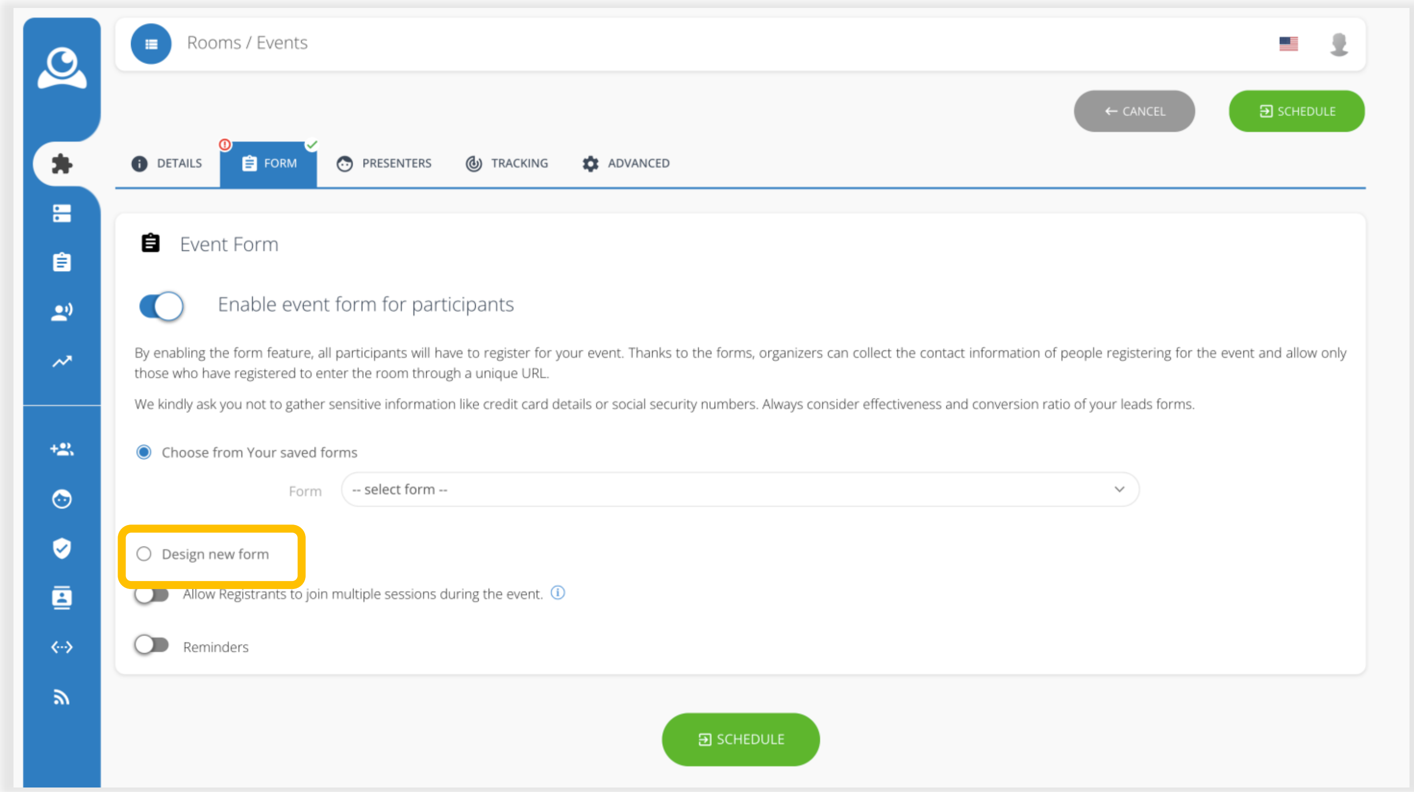
Before creating a form, it's worth getting to know more about the current data and privacy protection laws in place where you live (such as GDPR or RODO). When asking for personal data, you remember to create a checkbox for attendees to select that they agree with their data being processed under GDPR/RODO regulations and a clause about data processing.

How to Create a Form?

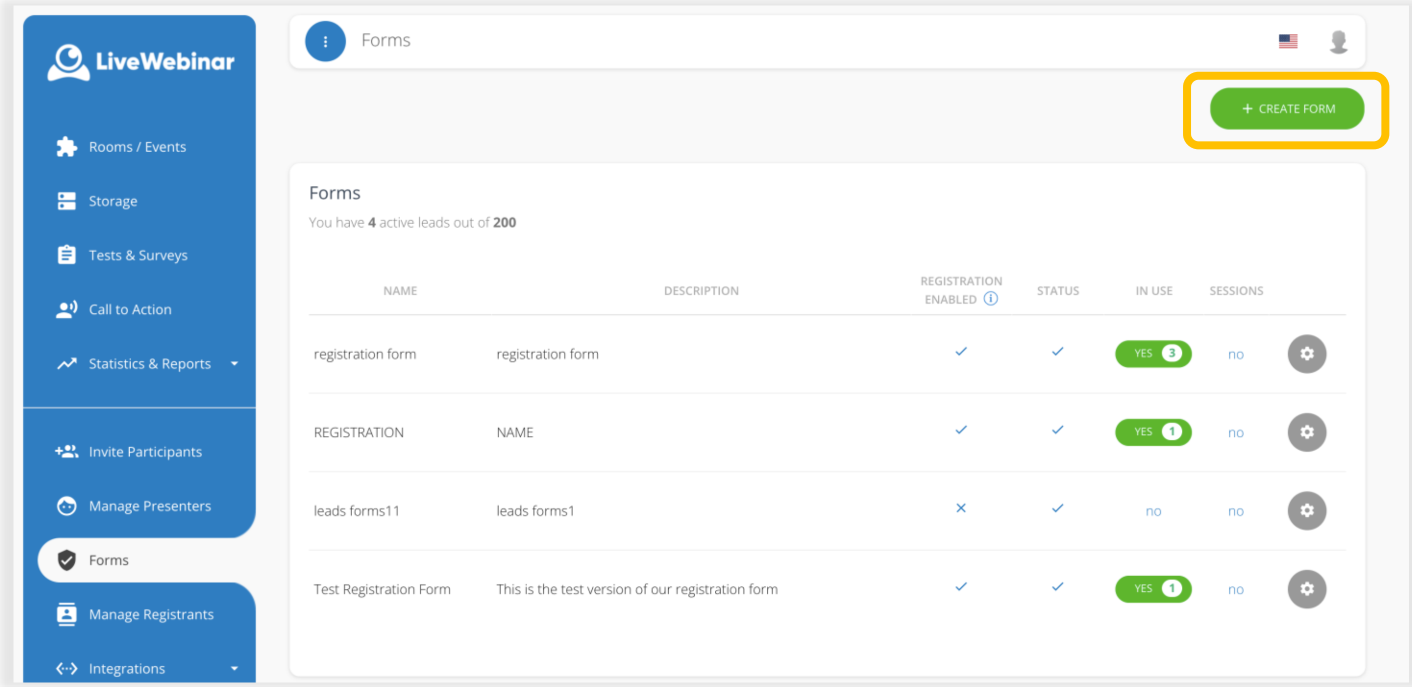
1. Find the “**Forms**” tab on the lower left corner of the user panel menu.



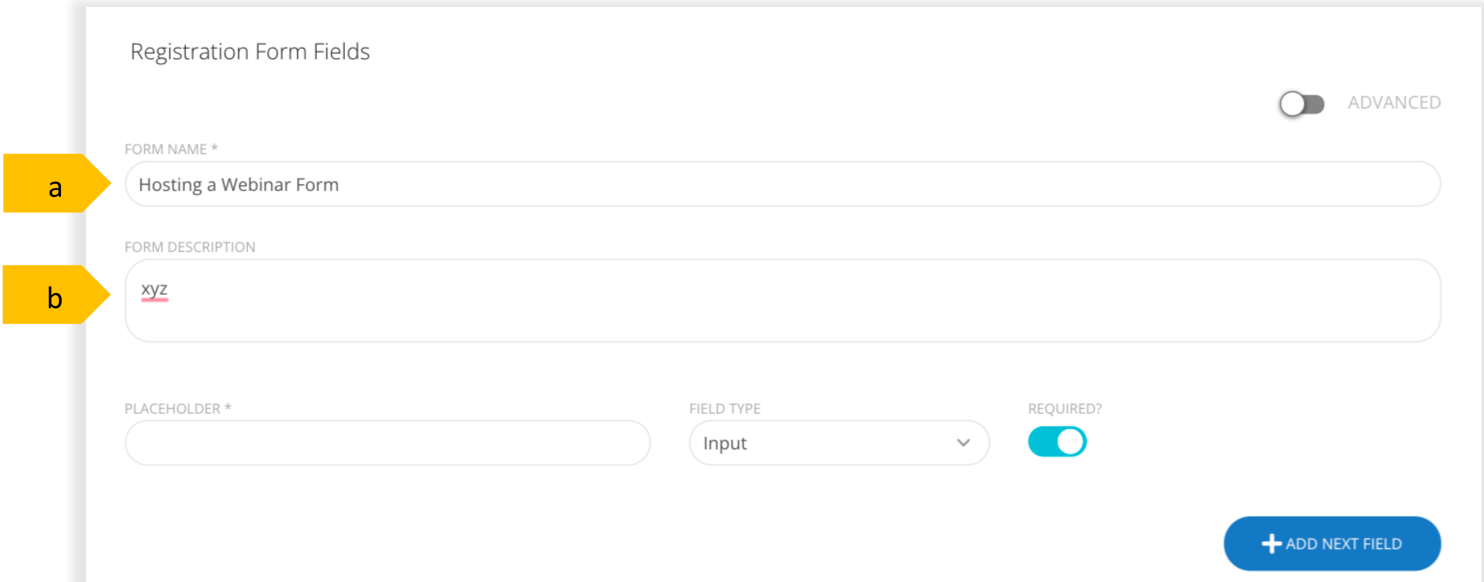
This can also be done while creating the event itself, by clicking on the “**Forms**” tab, and then on “**Design New Form**”, as shown on the screenshot below.



2. Going back to creating forms from the main menu, click on the green "**Create Form**" button on the right upper corner to start making your form.

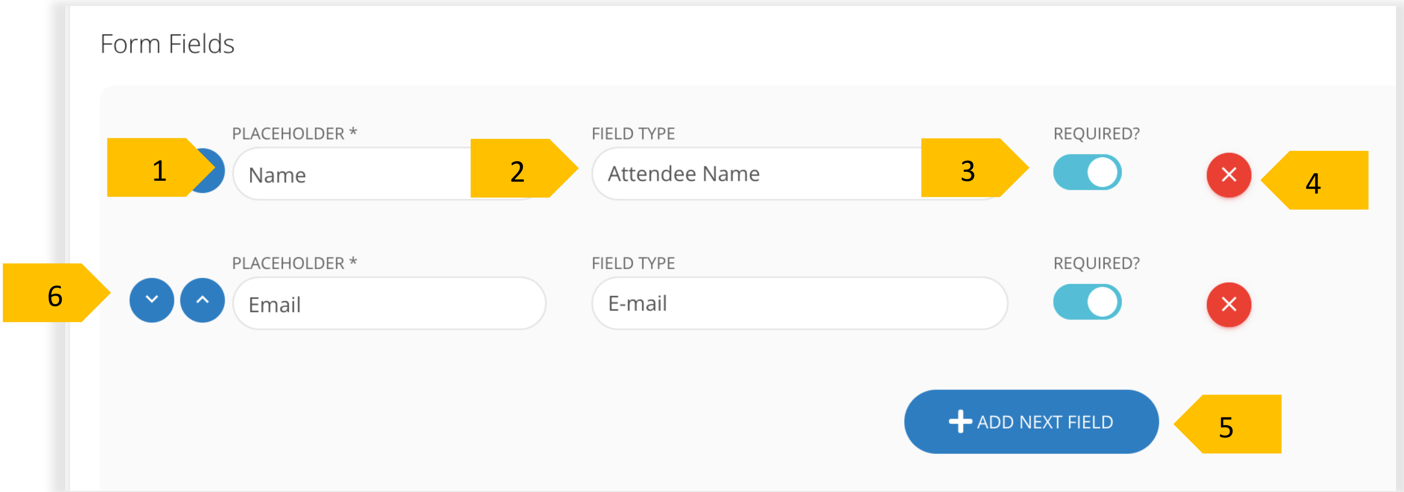


3. Next, fill in the following fields:
   a) "**Form Name**" – name your form
   b) "**Form Description**" – add a description of your form (optional)

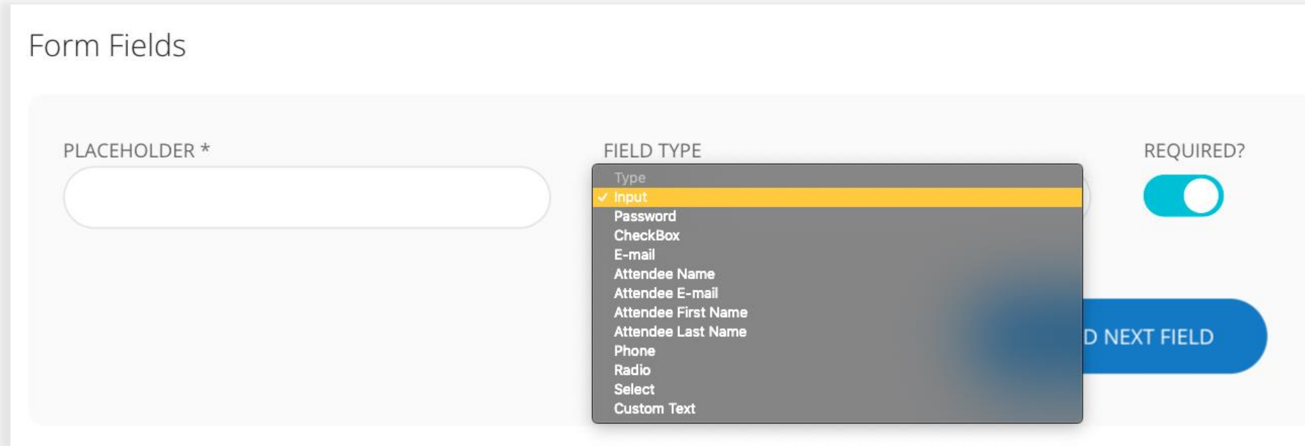


4. The next field requires you to add more information about the form itself.
   1) "**Placeholder**" – here put name of the data you want to be provided by an attendee (i.e. name, surname, e-mail etc.),

2) "**Field Type**" – choose the data type from dropdown menu,
3) If you want the field to be required, please mark the blue button "**Required**",
4) "**Delete**" – to remove the field, click on the red **(X)** button.
5) "**Add Next Field**" – please choose this option to add additional field with the data you want to be provided by your participants.
6) **Reorder form fields** – this option lets you move the form fields up or down the form.



5. Here's a detailed description of the field type description box:

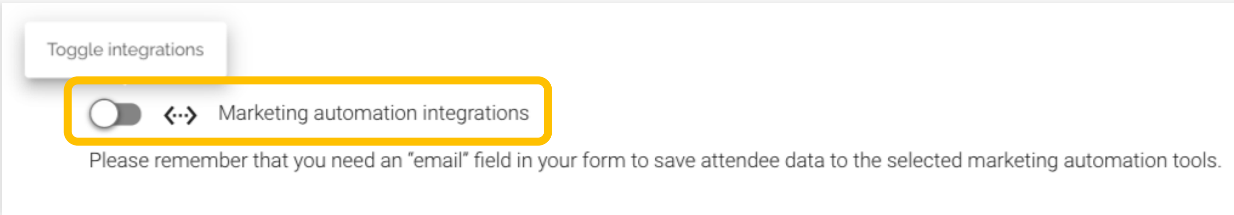


- **Input** – The default type is text
- **Password** – Create a password for participants to input to login
- **Check-Box** – Lets a user select ZERO or MORE options of a limited number of choices.
- **E-mail** – Lets a user add an e-mail address
- **Attendee name** – name of the attendee
- **Attendee email** – email of the attendee

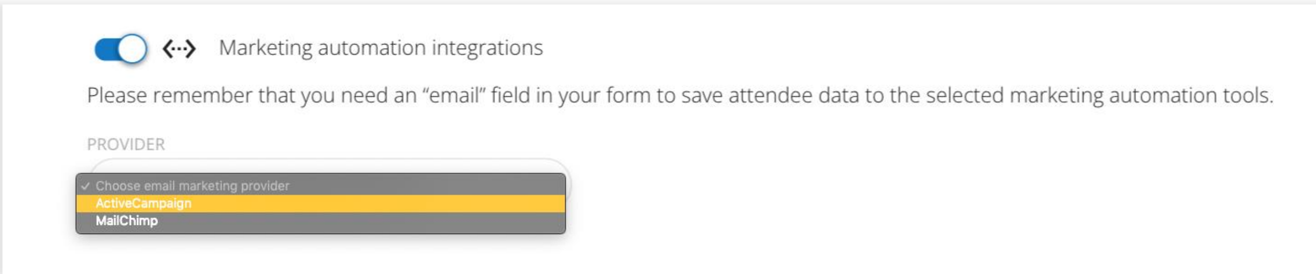
- **Attendee first name** – first name of the attendee
- **Attendee last name** – last name of the attendee
- **Phone** – Lets a user to add a phone number
- **Radio** – Lets a user select **only one** of a limited number of choices
- **Select** – Lets a user select **only one** of a limited number of choices from the dropdown menu
- **Custom text** – Input your own text that will be shown on the registration form

Marketing Automation Integrations

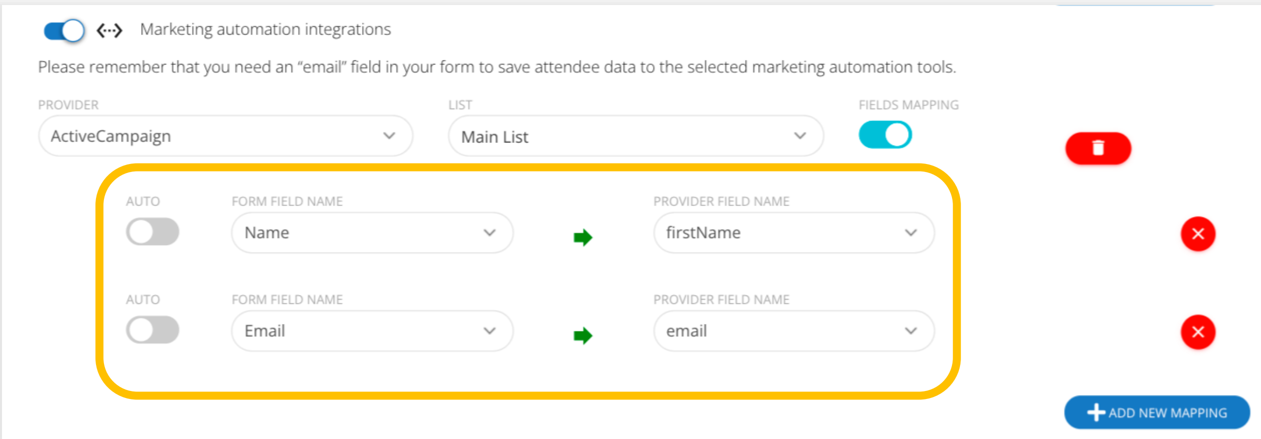
1. There is also the option to integrate the registration form with a marketing integration platform. To do so, toggle “**Marketing Automation Integrations**” on.



2. In the field “**Provider**”, select the platform with which you’d like to integrate your registration form.



3. Make sure to select “**Fields Mapping**”, which will send the fields you’ve selected to include to your selected platform. To integrate data from your registration form to marketing automation please make sure that all your settings are set up as on the screenshot below.



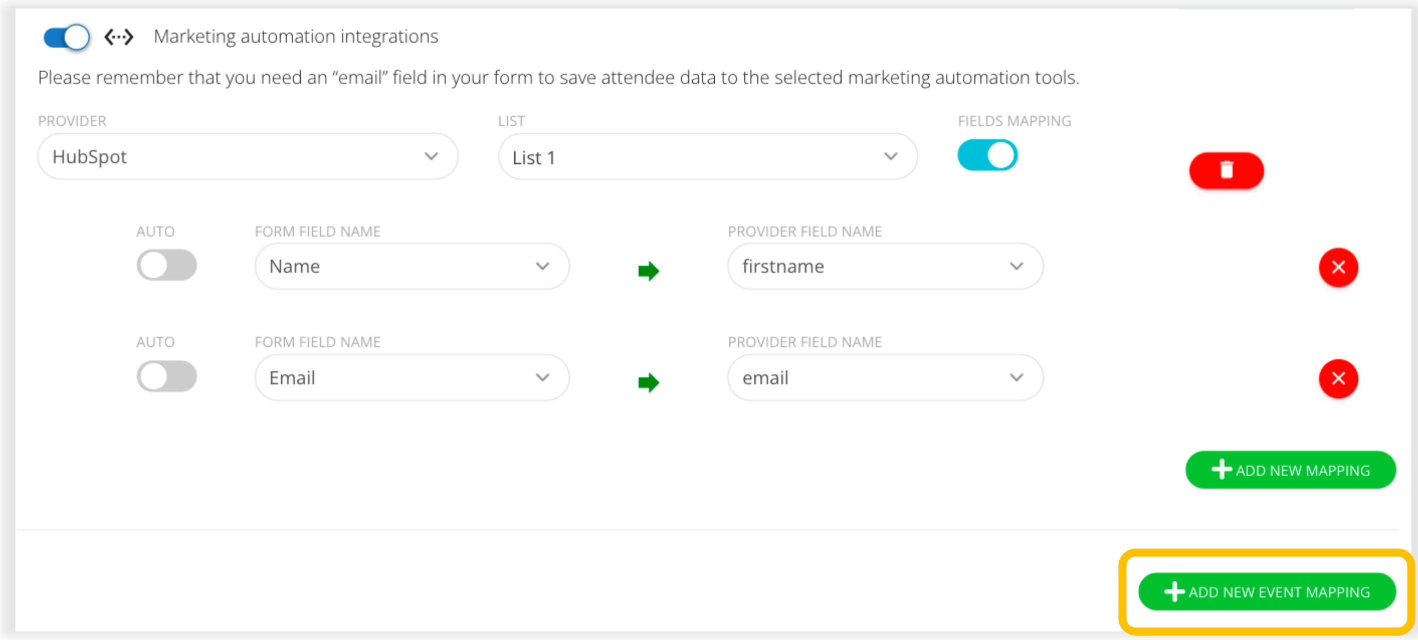
In this example we set up a form with three fields (“**Name**”, “**Surname**” and “**E-mail**”) and we mapped them with the corresponding fields in the ActiveCampaign platform (they are, in order: “**first_name**”, “**last_name**”, and “**email**”). **NOTE:** Make sure that in point 4 of the previous section (“How to create a form?”) while creating the “Email” placeholder field you’ve selected “Email” as the type.

4. Once you’ve provided all data please scroll down and click on the green “**Create**” or “**Update**” button to finish the registration form. For more information on integrations, consult our manual “**Marketing automation**”.

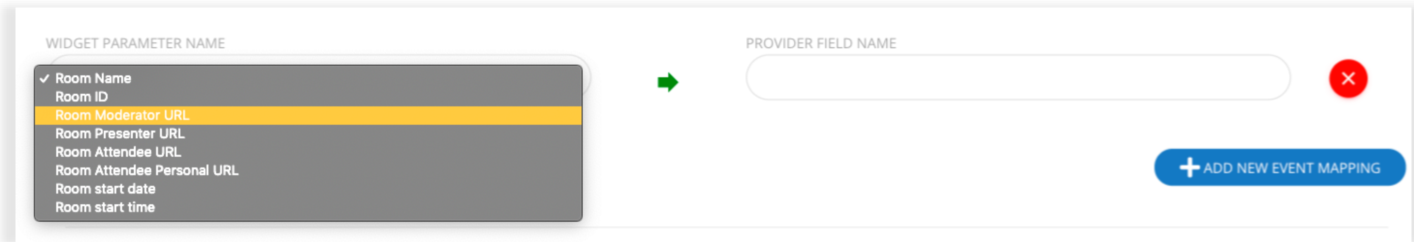
How to Add Event Mapping

It's possible to add event mapping in LiveWebinar, meaning you can send (for example) a presenter link from LiveWebinar via the Marketing Automation Integration.

NOTE: You must first add a custom field in your email marketing platform that will correspond to the field in LiveWebinar. These steps will be unique for each platform, so be sure to consult their manuals and 'how-to's' first.

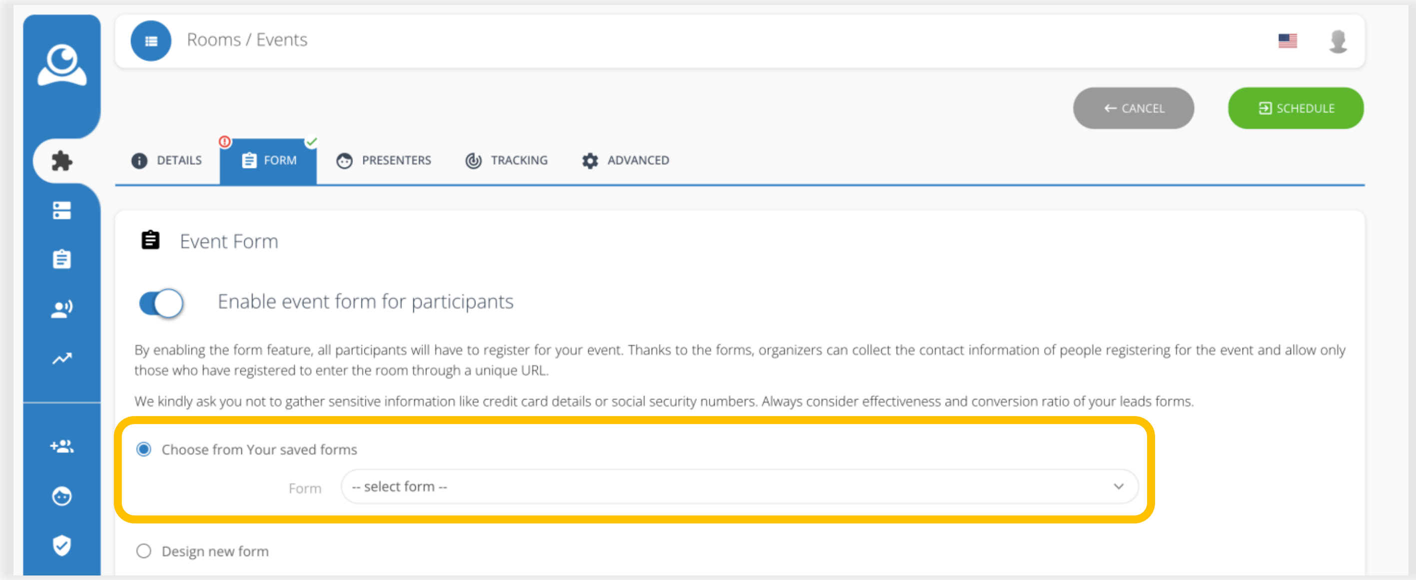


Once you've selected the "**Add New Event Mapping**" option, select the Widget Parameter you'd like to connect. Then, you can copy and paste the name of custom field you created into the "**Provider Field Name**" box. This field will be saved automatically.



How to Apply a Form to an Event

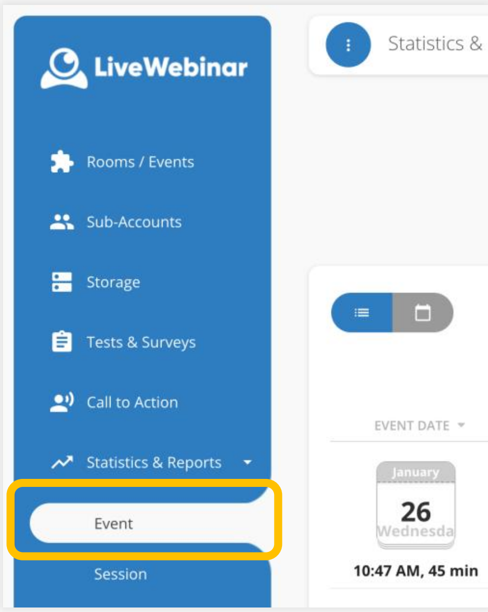
Once you've created your form, you can apply it to later events. While planning your event, click on the "**Form**" tab, and select the option "**Choose from your saved forms**". You will see a dropdown menu with your available forms. Choose the form you want to apply to the event.



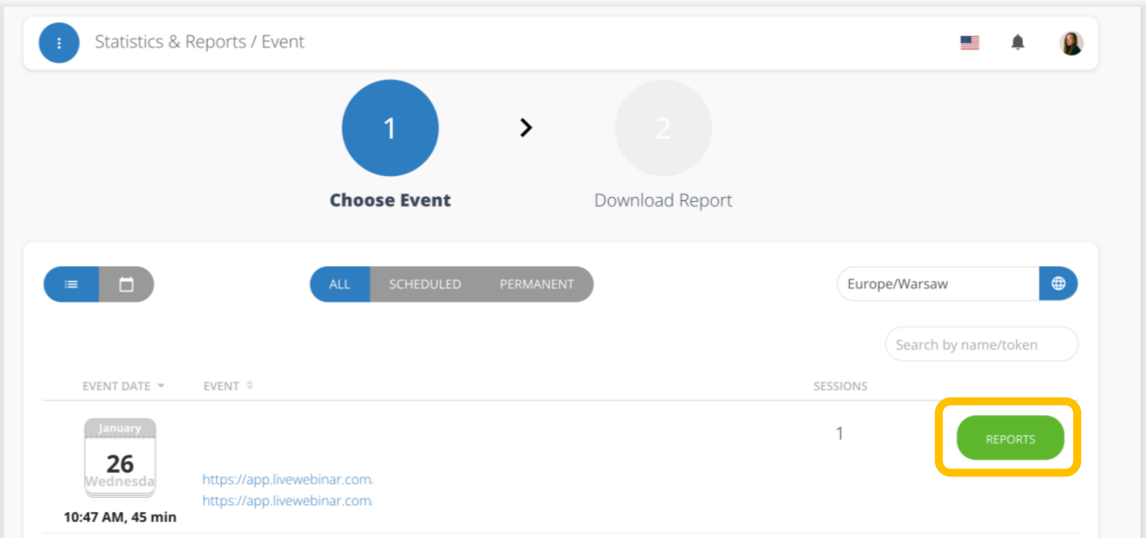
Where to Find Form Data

All data gathered during registration process can be found in "**Statistics & Reports**" section in the user panel menu.

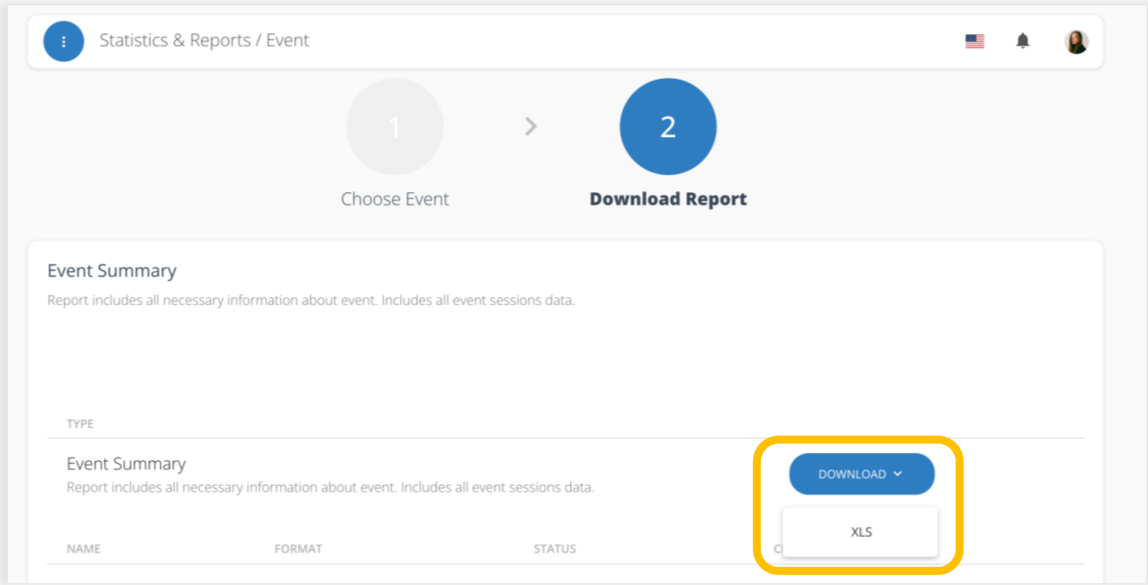
1. First select "**Event**".



2. From there, select the event for which you want to gather the registration form data by clicking "**Reports**".

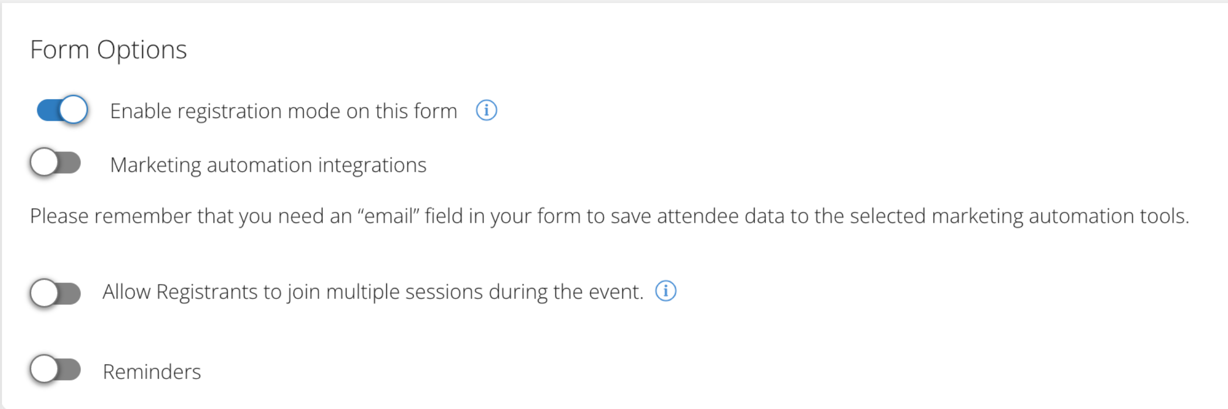


3. Click **download** and select "**XLS**". The data will be downloaded in the form of an Excel spreadsheet.


Statistics & Reports / Event
1
Choose Event
2
Download Report
Event Summary
Report includes all necessary information about event. Includes all event sessions data.
TYPE
Event Summary
Report includes all necessary information about event. Includes all event sessions data.
DOWNLOAD
XLS
NAME
FORMAT
STATUS

General Registration Form Options

The host of the event can choose to activate other options of the registration form. You can see them here:



a) **Enable registration mode on this form** – when users fill out the form, they register to receive a personalized URL that gives them access to the event.

b) **Marketing automation integrations** – enable marketing automation, letting registration details be moved directly to your CRM. See the marketing automation section for more details.

c) **Allow registrants to join multiple sessions during the event** – this option keeps all personal URLs valid for meetings in a given webinar room, even if the presenter or host choose to stop the current session and later activate a new one.

d) **Reminders** – thanks to this option, reminders will be automatically sent to the email participants provided about an upcoming event. You'll find more information about this section in the "**Registration Reminders**" part of this manual.

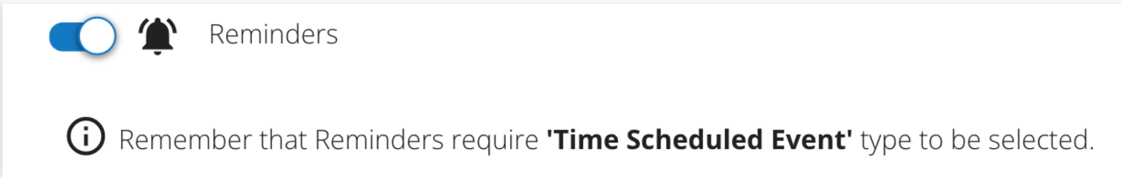
Registration Reminders

Forms in LiveWebinar have the option of sending reminders about an event to those who registered for it. Once this option is activated by the host, all participants who registered for the event will receive automatic reminders about it at the email they provided when filling out the form. The host decides how far in advance the participants will get the reminder.

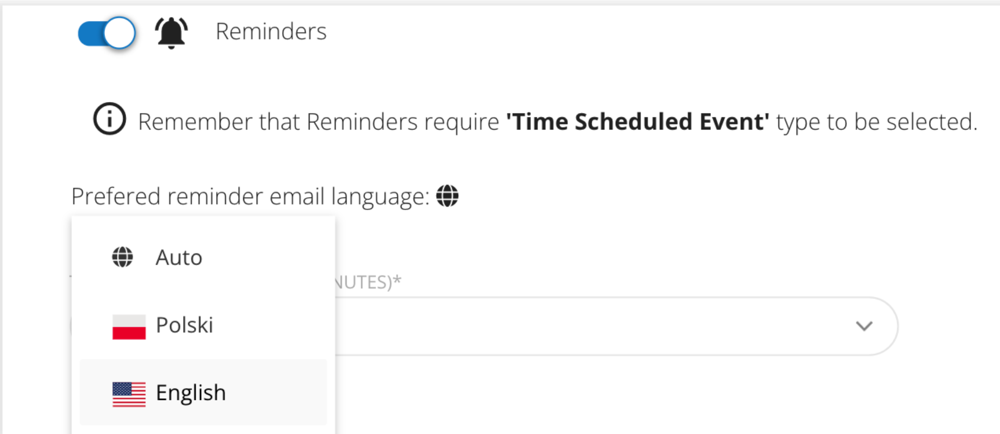
Automatic reminders can be sent in one of the available languages of the platform. If participants of the event come from all over the world, use the "**Auto**" option (shown in point 2) to automatically set the language to the participant's language.

To use reminders, follow these steps:

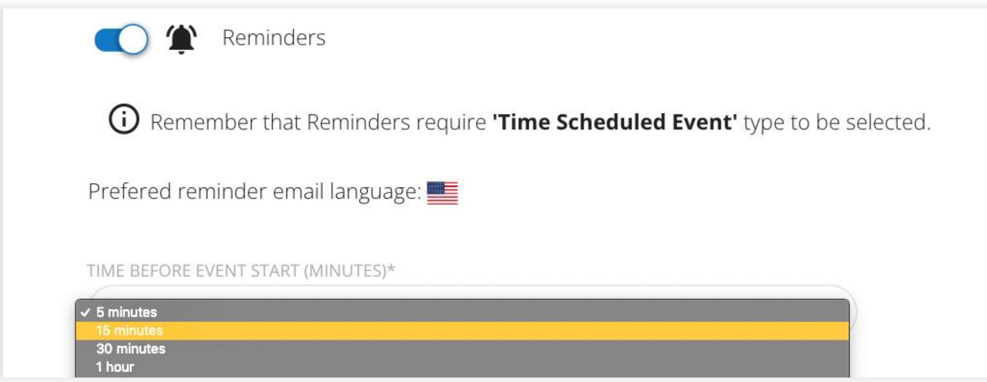
1. Activate the "**Reminders**" option in the "**Forms**" tab while planning your event.



2. Next, select the preferred reminder language, more languages are available in the platform.

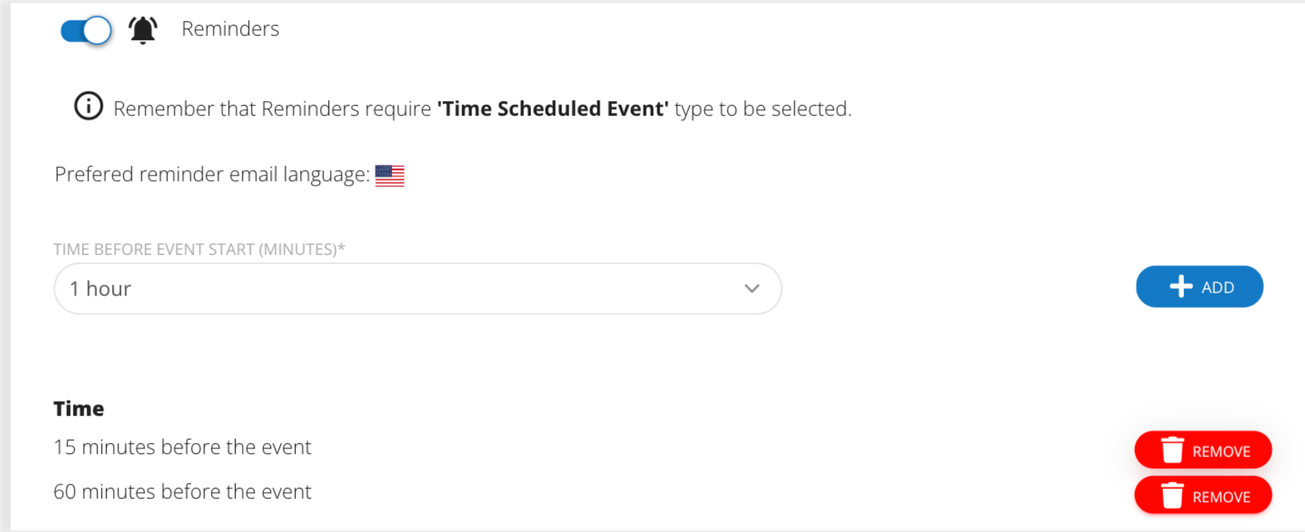


3. Select from the dropdown menu the time for delivering the reminder.



As an example, selecting the option for 1 hour before means that the user will receive their reminder email and hour before the beginning of the event.

4. You can also set a series of reminders. To do so, simply repeat the steps above.



5. Easily remove reminders by simply clicking “**Remove**”.