

Creating a Sign-Up Form

Create and customize a form to allow visitors to sign up for alerts, newsletters, or anything you wish to send using the ezTaskConnect[™] platform.

1. Navigate to http://connect.eztask.com and enter your account credentials.

EZTASK						
Welcome Back!						
Login with your erTask account						
Username / Email	-					
=	Forgot?					
Remember username/email?						
Login						

2. Upon successful login, click the "New Project" dropdown menu and choose "Form Builder".

A EZTASK	@ B	mail 👻	🗐 ezTask 360 🕶	More	_		
New Project		v	Velcome to ezTask				
Project Coun	t	XY	our account is setup an o create your first project	d you can no t, click "New	w begin creating Project' on the k	campai eft and c	gns and automations. thoose the project type you'd like to creat
Autoresponder ezTask 360	0						
Email Facebook	0			Nev	Project 👻		
Fax	0 0						
Form Builder Landing Page	0				Autoresponder	@	Email
SMS Survey	0			•	SMS	6	Calendar
fwitter Joice	0 0			0	CRM	6	Integrations
Poice	0			Ő	Engager Live		Landing Page
					ezTask 360		Sonar
				ŏ	Facebook		
				U	Pacebook	۳	Survey
				<u>n</u>	Fax	. 🖸	Twitter
				CO	Form Builder	C	Voice

3. Add a Project Name and click "Start" under the Form button.





4. Choose a template (click to select) and click "Continue to the Editor" to add customization.

Select a Category	Contact Us	Get up to date information	Want guick updates over SMS	
Default	Name *	Choice your justifiered way to day streamined	Day up to date with the intent optimies and news	9r
Feedback	First lane Last land	Email Loten	Name	1
Signup	Enal * use/Decomple.com Nosage *	Phone Number	SMS Number	
	Tabol		Preview Preview Want quick updates over SMS? By the date and has aller dates and have. Name Preview Sals Number Preview over the dates and have and	Design

- 5. After customization is complete, click "Next" at the bottom of the page to continue.
- 6. Where the page says, "When a contact is added to my list, I want to", choose to "Create a new contact" (radio button). In the modal window that appears, add a list name and click "Create". When finished, click "Next".

Tutorial	Data Settings			
	Store Your Data in a List			
	Available Lists (Contacts)	Connected Lis	sts (Contacts)	
		77 7		
	Drag and drop the lists you want to be connected to your	form into the box on the right.	2 New List	
1	When a contact is added to my list I want to: • Create a new contact (ignores existing contacts). Update an existing record (creates a contact if no-	existing record is found).	Create New List	
Form Builder zTask Sitemap Terms and Co	nditions Privacy Anti-Spam Policy Pricing Contact Us		Name your List	
			My List Name	2
				Cancel or Create

7. Optional: Customize "Basic Settings" and/or "Advanced Settings"; click "Next" to continue.



- 8. Click "Next" to use the default Thank You Page; optional: click "Use Custom Thank You Page". Click "Next" when finished.
- 9. Choose to show form upon page load (popup) or use an HTML Form Button. Customize text, position, and colors as desired; click "Next" to continue.
- 10. Review settings and ensure all check boxes are green with check marks. If needed, click 'Edit" next to the settings you wish to modify.
- 11. When finished, click "Complete Project".
- 12. A modal window will appear with a survey (optional) and various codes for accessing your new form.

Included:

- Form URL
- Standalone JavaScript
- iframe code
- Modal form JavaScript
- Click button code

If you need help or have any questions, please contact us (that's what we're here for!):

Submit a support ticket at support.eztask.com

Email support@eztask.com

Call us at 800-921-6764