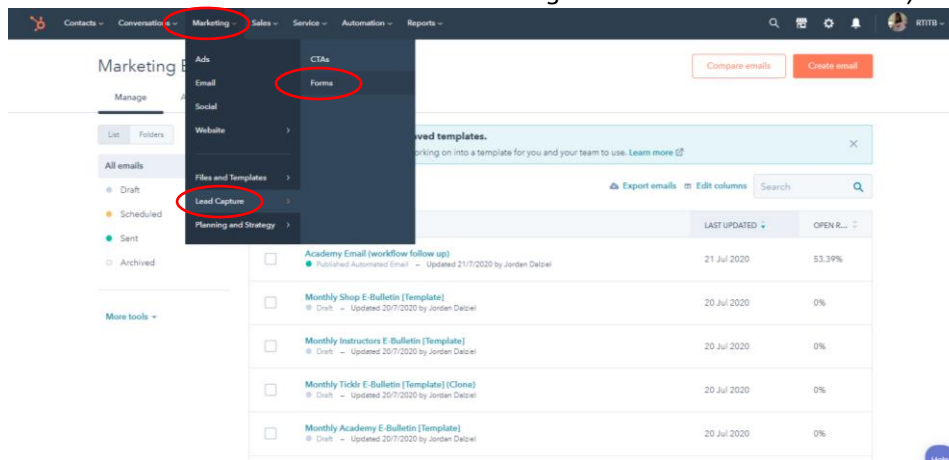
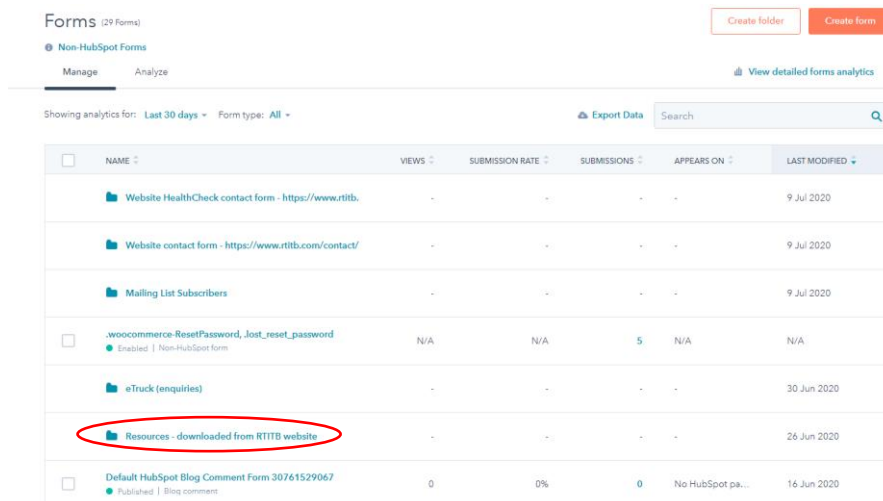


HubSpot – how to create a new form

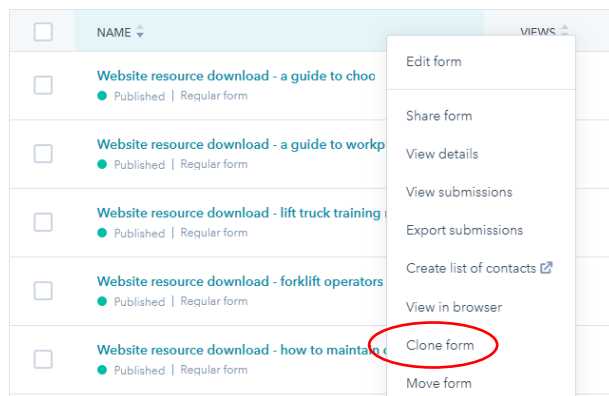
1. Login to your HubSpot account
2. Locate to Marketing – Lead Capture – Forms (for the purpose of this example lets use the ‘Resources’ folder as if we were creating a new form for a download).



3. Locate to the ‘Resources’ folder



4. Hover over one of the forms and click Actions – Clone Form



5. Change the name of your form i.e. ‘Website resource download – name of resource’
6. Click ‘Clone’
7. In the tab ‘Form’ everything is set up and ready so you do not need to do anything with this section

8. Locate to the 'Options' tab (again you do not need to do anything with the 'Follow-up' tab)

The screenshot shows the RTITB form builder interface. The 'Options' tab is selected and highlighted with a red circle. The interface includes a sidebar on the left with 'ADD FORM FIELD' and 'CONTACT PROPERTIES' sections. The main area displays a form with fields for 'Full Name (required)', 'Email Address (required)', and 'Job Title (required)'. A 'Publish' button is visible in the top right corner.

9. Upload the resource as you normally would to the backend of the RTITB website and copy the URL
10. Change the text in the first sentence to the title of the new resource
11. Highlight over the 'You can access your free resource here.' link and click 'edit'
12. Enter the new URL, make sure 'open this link in a new window' is selected and click 'apply'

The screenshot shows the RTITB form builder interface with the 'Options' tab selected. A dialog box is open for configuring a link. The 'Link text' is 'You can access your free resource here.' The 'Link to' dropdown is set to 'URL'. The 'URL' field contains 'https://www.rtitb.com/wp-content/uploads/'. The 'Open this link in a new window' checkbox is checked. The 'Apply' button is highlighted. The background shows the form content, including a thank you message and a link to 'Continue browsing the RTITB website.'

13. For the website resources, submission email notifications will need to be sent to website@rtitb.com and marketing@rtitb.com.
14. Once you're happy, click 'publish'

The screenshot shows the RTITB form builder interface with the 'Options' tab selected. The 'Publish' button is highlighted with a red circle. The interface includes a sidebar on the left with 'ADD FORM FIELD' and 'CONTACT PROPERTIES' sections. The main area displays the form content, including a thank you message and a link to 'Continue browsing the RTITB website.'

15. Either copy and past the 'embedded code' and send to the Molokini web team to add the new resource to the website or let Lea know where this is saved on Hubspot so she can go in and grab the code.
16. Once uploaded to the website, make sure to test it.