



# Add a custom appointment request form to your website

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Source: <https://getsitecontrol.com/usecase/create-appointment-request-form/>



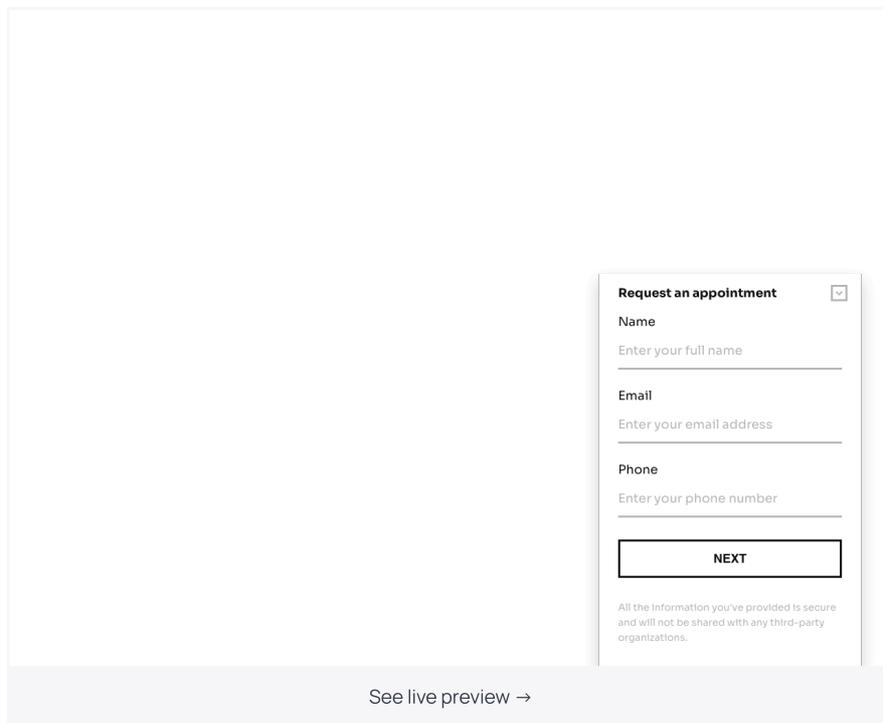
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7 min read

When you're a business owner, managing appointments can be a demanding task, especially if you do it the old-fashioned way — via email or phone.

Sounds familiar? Well, the first step in solving any problem is recognizing there is one. And if you're looking for a more productive way to manage appointment requests, you're already on the right track.

Getsitecontrol can give you an edge in this regard. It's an easy-to-use online form builder that requires zero coding knowledge. Once you've read this post, you'll be able to create an appointment request form like this one 🙌



On your website, the form will look like a compact panel in the corner of a page that expands when you click on it. Feel free to hit the ‘See live preview’ button above to see it in action. From there, you’ll be able to quickly add the form to your website, customize it, and receive instant notifications each time someone requests an appointment.

Below, we’ll show you how to set up a form like that for your website, step by step. Then, we’ll provide a few tips to ensure people follow through with the submission process.

## How to add an appointment request form to your website

To create and display an appointment request form on your website, you need to create an account and start your free trial (no credit card is required at this point).

Next, install Getsitecontrol on your website. The installation process is straightforward: you can follow the prompts right in the app or read the instructions on the website.

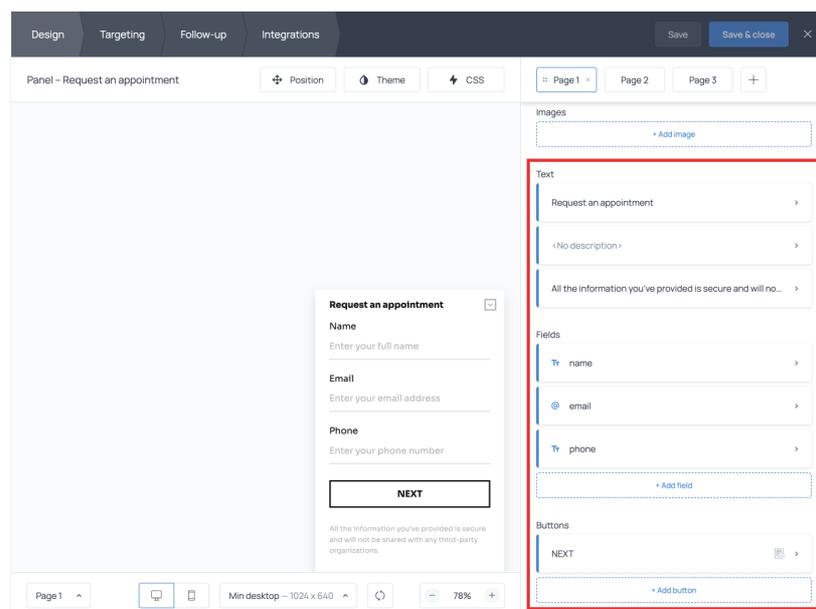
**If you're using WordPress, we recommend using the Getsitecontrol plugin. If you're using Wix, install the dedicated Wix app.**

Once that is out of the way, click the form template featured above and follow the prompts to add it to the Getsitecontrol dashboard.

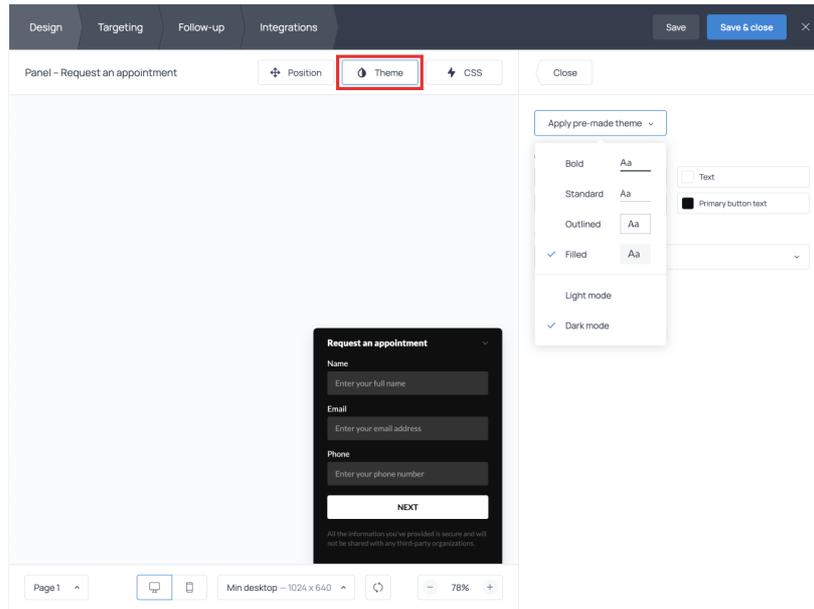
From there, you'll be able to change the copy, customize fields, set up notifications, and add a follow-up email for your registrants.

## Step 1. Customize the content of the form

On the first screen, you can edit the copy and design according to your needs. To edit any element – a text description or field – just click on it and proceed with the adjustments.

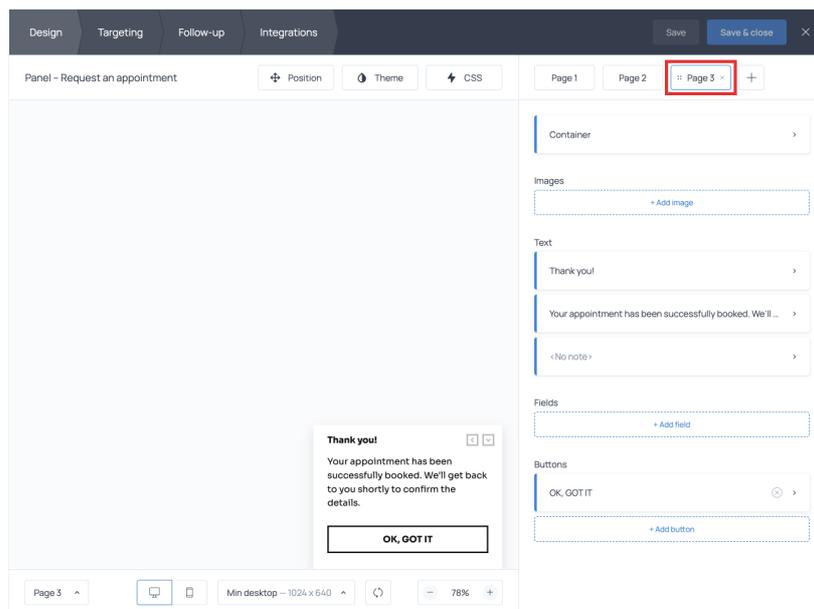


If you want to change the style, font, or color theme of the form, open the **Theme** menu at the top and toggle the controls.



In the example above, you can see a different form style and dark mode applied.

Notice that this form template contains 3 pages. The second page is designed for additional questions; the third page contains a submission success message — a short note confirming that the request has been received 📌

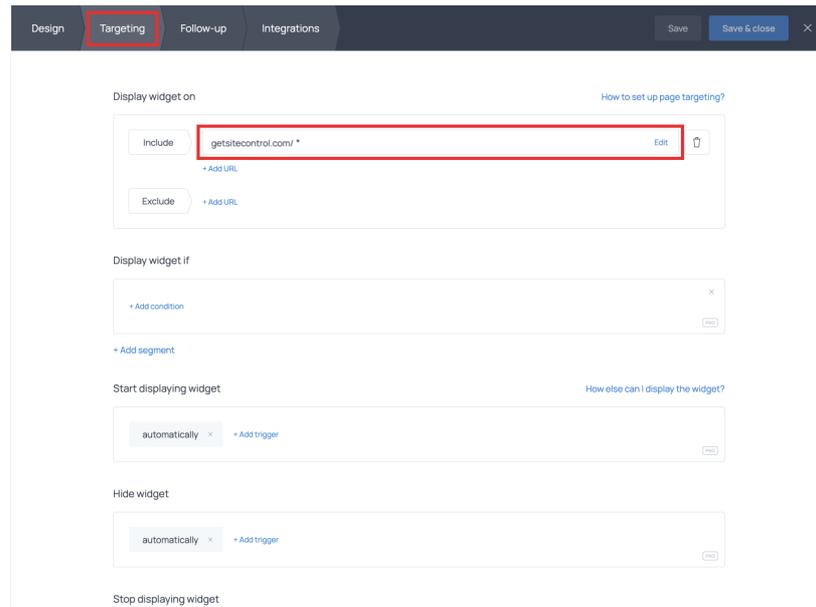


Use the controls in the top-right corner to navigate through the pages and view the default

text. Feel free to customize the copy and fields depending on your needs.

## Step 2. Specify where you want to display the form

Once you've finished customizing the appearance of the form, open the **Targeting** tab to indicate where you want to display it.



By default, the “Request an appointment” panel will be displayed on every page of your website. However, if you want to add it to selected pages only, remove the ‘\*’ from the ‘Include’ field at the top, and add the URLs of these pages instead.

Learn more about other targeting settings from our [complete guide to targeting](#).

## Step 3. Prepare a follow-up email

A follow-up email is an automated email sent to every person who fills out the form.

# You can create and set up a follow-up email right in the Getsitecontrol dashboard – there’s no need to connect email marketing software for this.

To get started, go to the [Follow-up](#) tab and click [+ Add follow-up email](#).

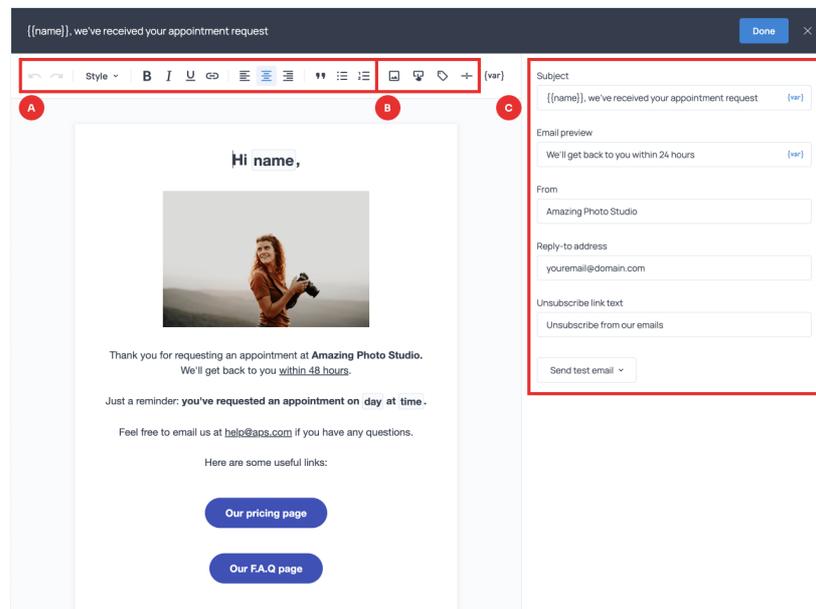
Choose ‘Start from scratch’ and start typing your copy:

The screenshot shows the 'Follow-up email' editor. The main area contains a rich text editor with the following text: 'Hi name,', 'Thank you for requesting an appointment at Amazing Photo Studio.', 'We'll get back to you within 48 hours.', 'Just a reminder: you've requested an appointment on day at time.', 'Feel free to email us at [hello@ans.com](mailto:hello@ans.com) if you have any questions.', 'Here are some useful links:', 'Cheers, Nate'. Below the text is an 'Unsubscribe from our emails' link. The right sidebar contains fields for 'Subject', 'Email preview', 'From', 'Reply-to address', and 'Unsubscribe link text'. A 'Send test email' button is at the bottom. A red box highlights the '{var}' icon in the editor's toolbar.

Notice that in the copy, you can use the respondent’s name and other info they’ve submitted through the form. To do that, click on the {var} icon at the top of the page and select the variable you need: the date or time of the appointment, for example.

💡 Variables are named after form field IDs; you can modify them by clicking on each field and renaming them.

Use the controls on the left to style text, and the buttons on the right to add more elements to the email, like images, buttons, dividers, etc. .

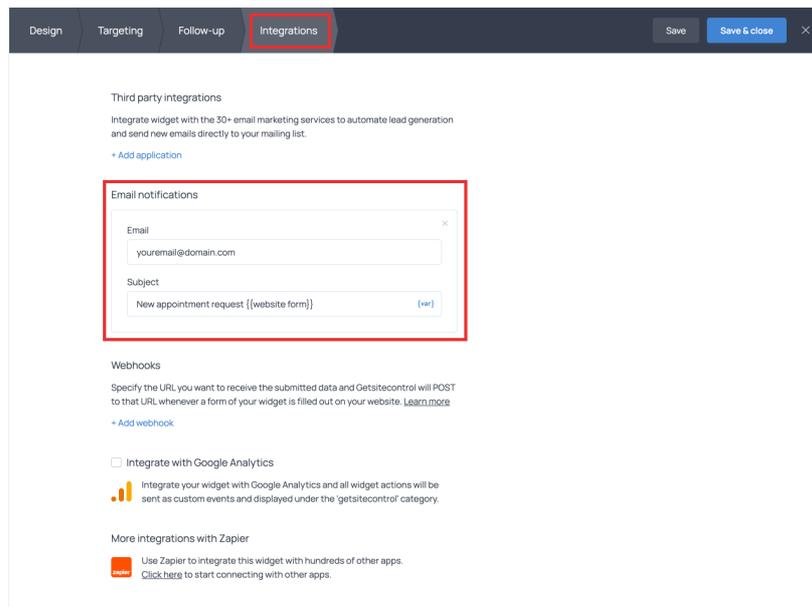


Finally, fill out the subject, email preview, and sender's name fields on the right-side menu.

When your follow-up email is ready, click **Done** and select whether it should be delivered at once or with a delay.

## Step 4. Set up notifications

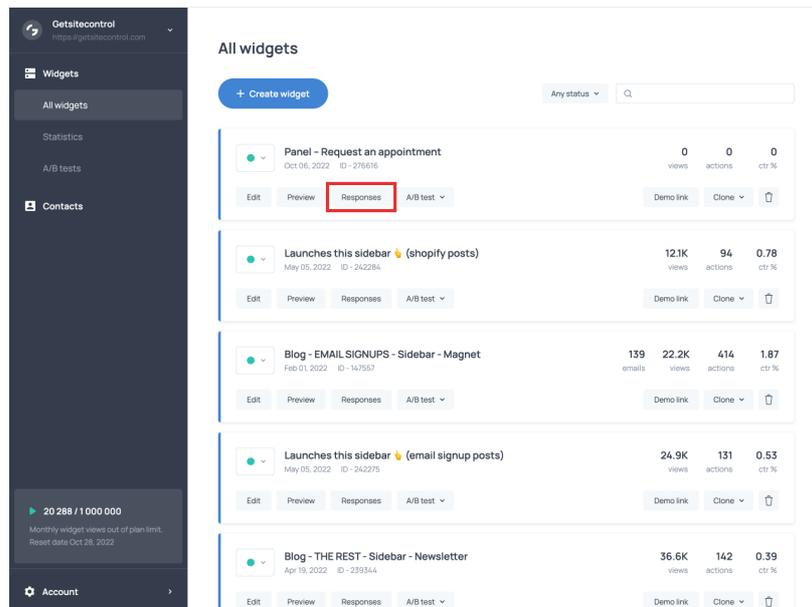
If you want to receive email notifications about new appointment requests, open the Integrations tab, click **+Add notification**, type your email address and a subject line.



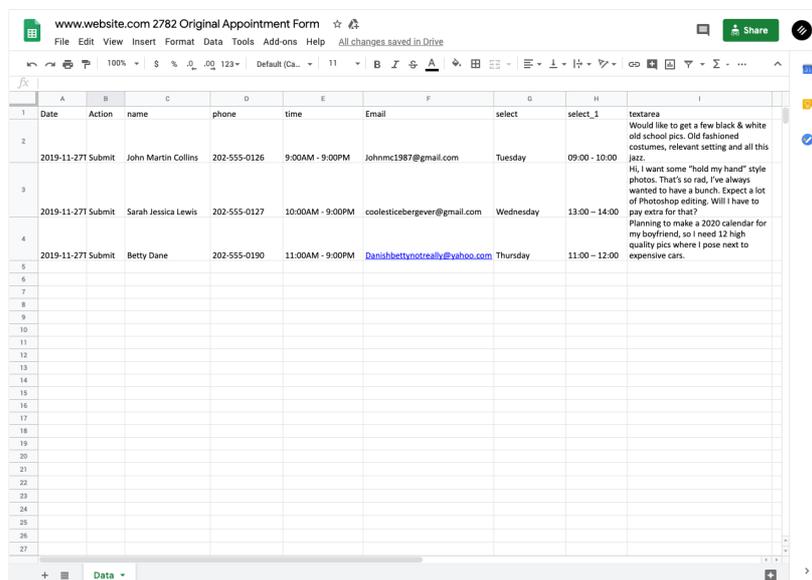
And that's about it. Ready to see your form go live? Hit the [Save & close](#) button in the top right corner of the screen and activate it following the prompts.

## How to download appointment form requests in bulk

For each form you create in Getsitecontrol, there is a submission report available right in the dashboard. You can find it by clicking [Responses](#) at the bottom of the form card in your dashboard.

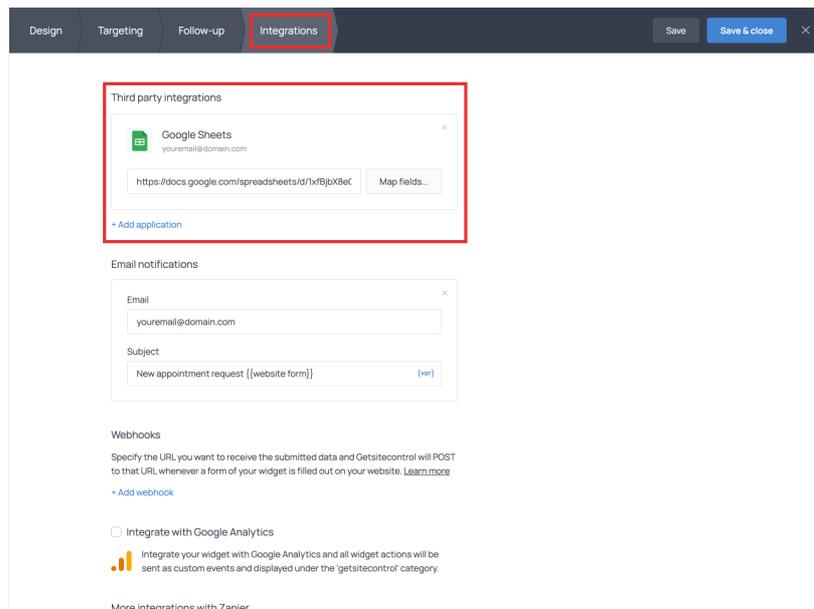


The report houses all the appointment requests sent through the form. You can view them in the dashboard or download the report in a spreadsheet that will feature detailed information on each entry.



If you're using 3rd-party cloud apps for your business – for instance, CRM or appointment scheduling software – you can integrate them with the form. This way, Getsitecontrol will send the data submitted through the form to the software of your choice.

To set up an integration, go to the [Integrations](#) tab:



If the software you are using is not among the supported apps, you can use [Zapier](#) or [Integrately](#) to connect it to Getsitecontrol. For more information, use the [instructions from the Help Center](#).

## Tips and tricks on building an appointment form

A bulky, unintuitive form can cost you a lead.

Yes, you read it right. If someone fails to understand or to fill out the form correctly, you may lose them as a potential customer.

That's why in the following **sections**, we'll go over design tricks to make your appointment form more convenient to use.

### 1. Use checkboxes and dropdown lists to save your clients' time

If some responses can be categorized or pre-filled, you should do that using dropdown

lists, checkboxes, or radio buttons. Not only will it save your prospects' time and effort, but it will also make appointment requests easier to organize and scan through.

Note that in Getsitecontrol, all fields are created mandatory by default. If you want to make a field optional, just click on it to expand the settings and tick off the 'Required' option.

## 2. Place easy-to-complete fields first

Here is another trick: place the fields that take minimum time to fill out at the beginning of the form. Leave the heavy-text comment fields for the end of submission, or even make them optional.

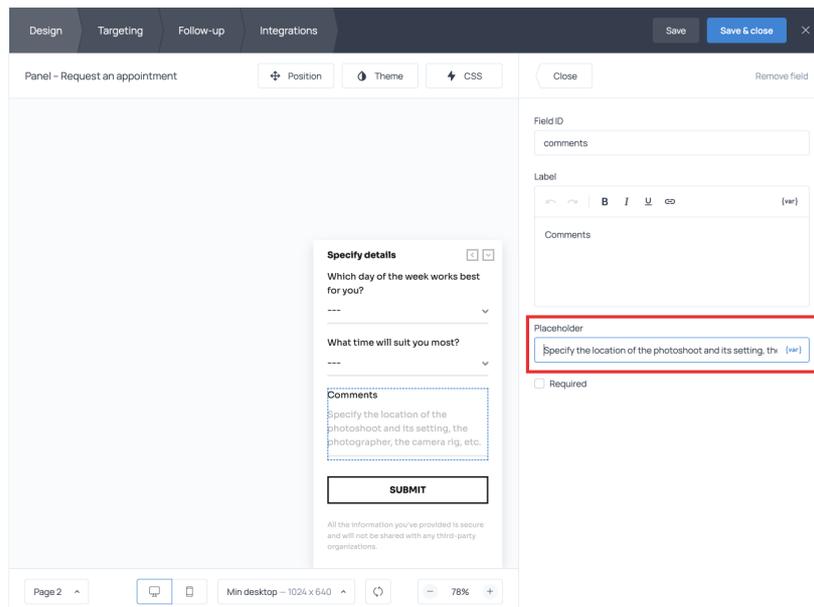
**If a form starts with large text fields, it may push your prospects away from filling it out or make them want to postpone the submission.**

Meanwhile, if they start with checkboxes and other easy fields, chances are higher they will finish the submission after going halfway through.

## 3. Add microcopy to eliminate uncertainty

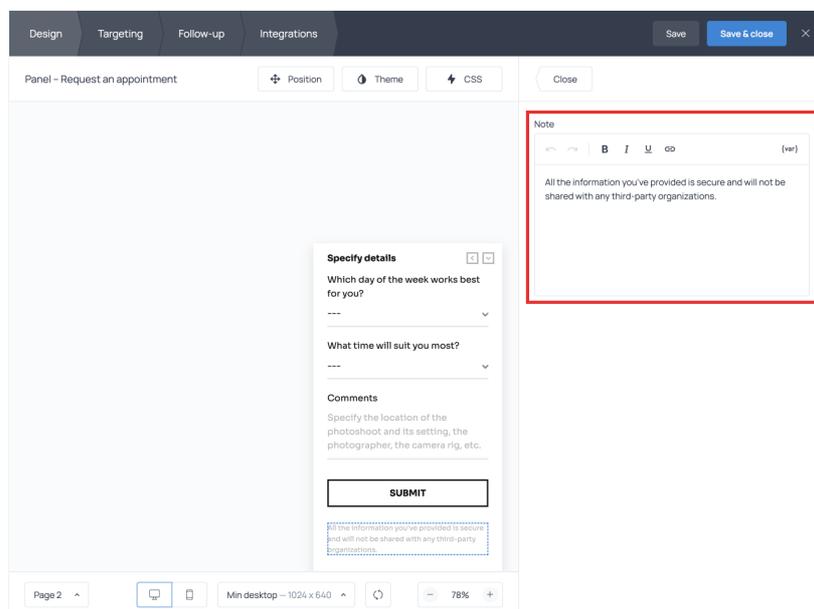
The best practice is to keep field labels concise. However, if you think your prospects might misunderstand the purpose of some fields, you can add microcopy – a small piece of text written for explanatory purposes.

Here is an example of clarifying microcopy:



Another great use of microcopy is removing customers' obstacles and concerns.

Take the safety concern as an example. Sharing personal information online is a sensitive subject, so if you refer to your Privacy Policy in the microcopy, it will highlight the trustworthiness of the website.



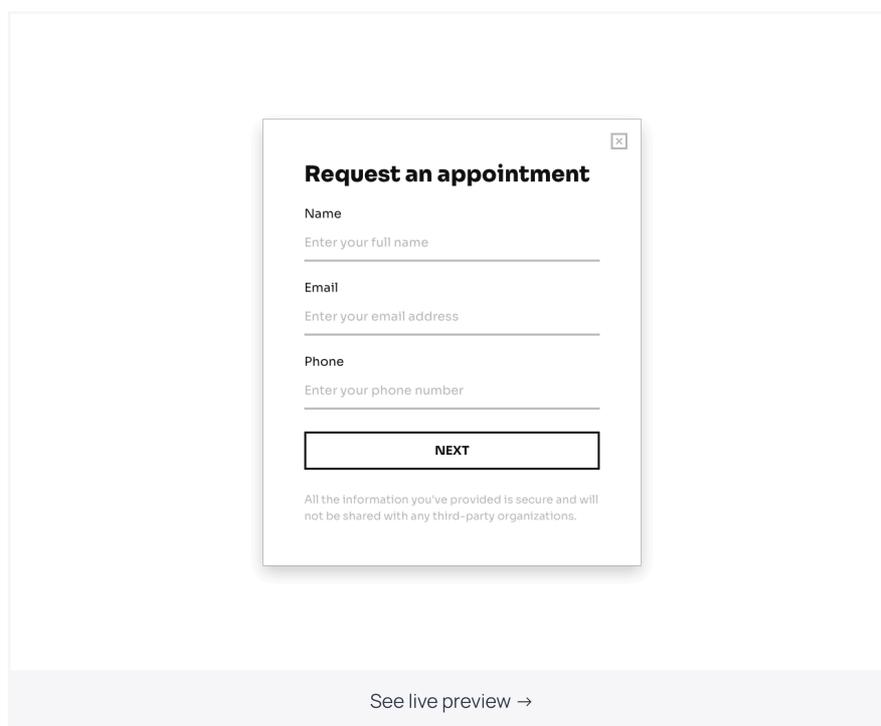
You can place your Privacy Policy microcopy at the bottom of your form. To do that, open the 'Note' segment at the very bottom of the Text section and enter your copy.

## 4. Create different form types for different pages

Should your appointment request form be attention-grabbing? That's a tricky question.

On the one hand, you surely want people to make appointments. On the other hand, you probably don't want to be too pushy displaying the form when your website visitors aren't ready to fill it out.

If that's the case, you can build two types of forms. One may appear as a popup on a page where visitors are likely to be interested in making an appointment. These can be the Contact page, the Pricing page, or the Schedule page.



**Request an appointment**

**Name**  
Enter your full name

**Email**  
Enter your email address

**Phone**  
Enter your phone number

**NEXT**

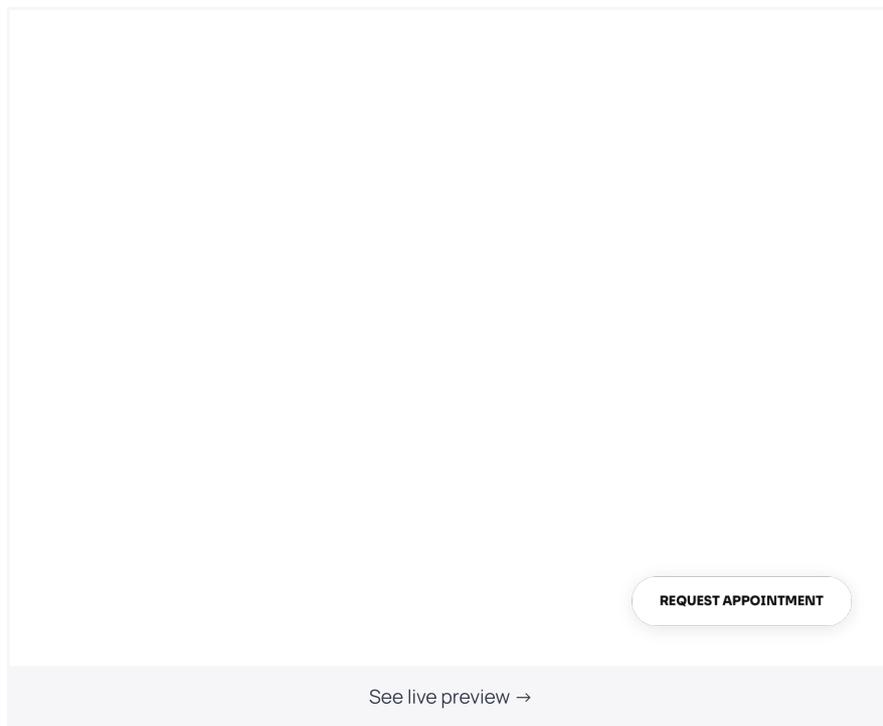
All the information you've provided is secure and will not be shared with any third-party organizations.

[See live preview ->](#)

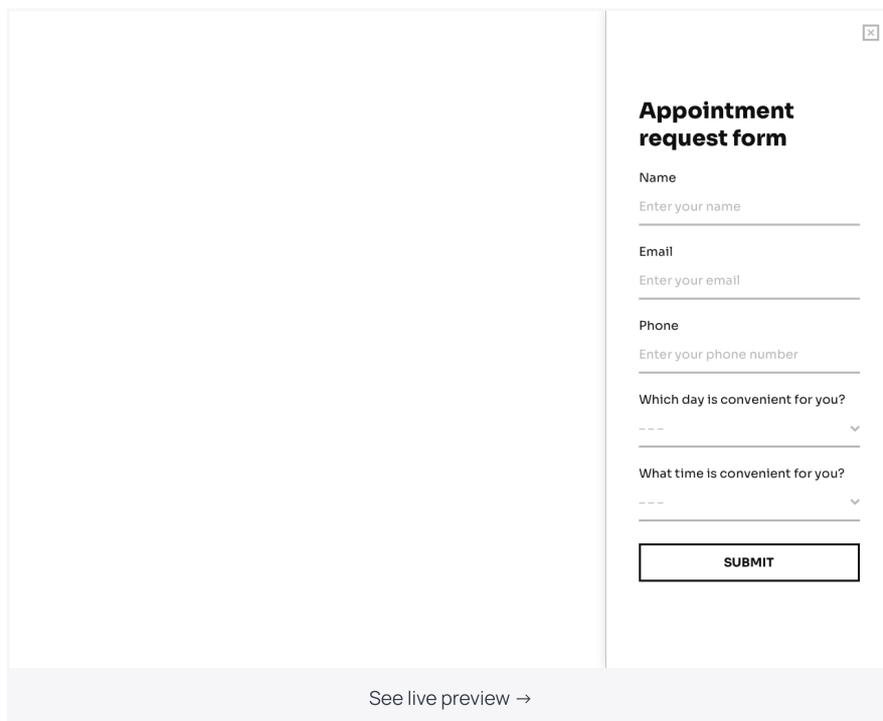
On the remaining pages, you can install a less intrusive panel that expands upon click.

## 5. Opt for a floating button

If you prefer floating buttons to popups or panels, Getsitecontrol allows you to use them as well. For example, you can place a button like this one on your website:



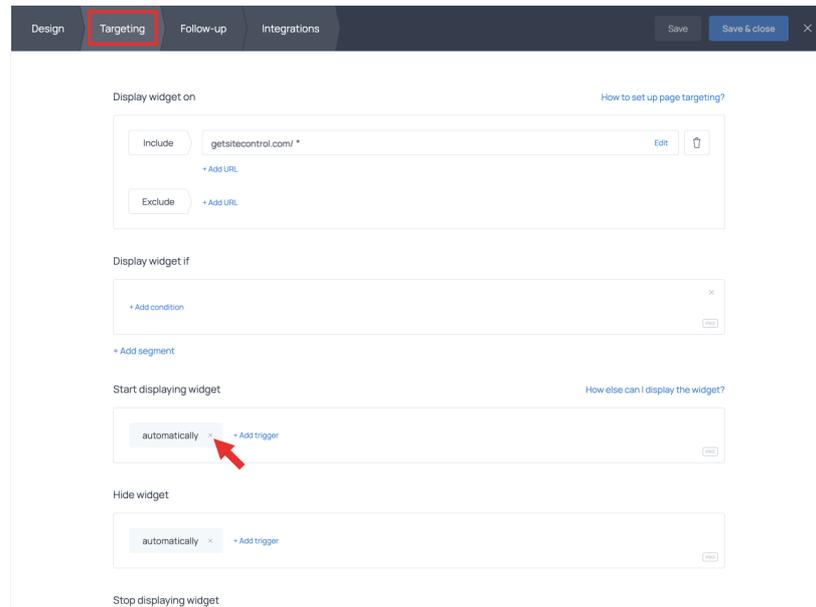
At Getsitecontrol, we call such buttons ‘launchers’, and you can find more examples [in the gallery](#). Launchers are designed to trigger pop-up forms upon click. For instance, if you’re creating an appointment request form, this is what it may look like:



To implement this scenario on your website, add both templates – the launcher and the

form – to your Getsitecontrol dashboard. Then, connect them so that the button will trigger the form upon click.

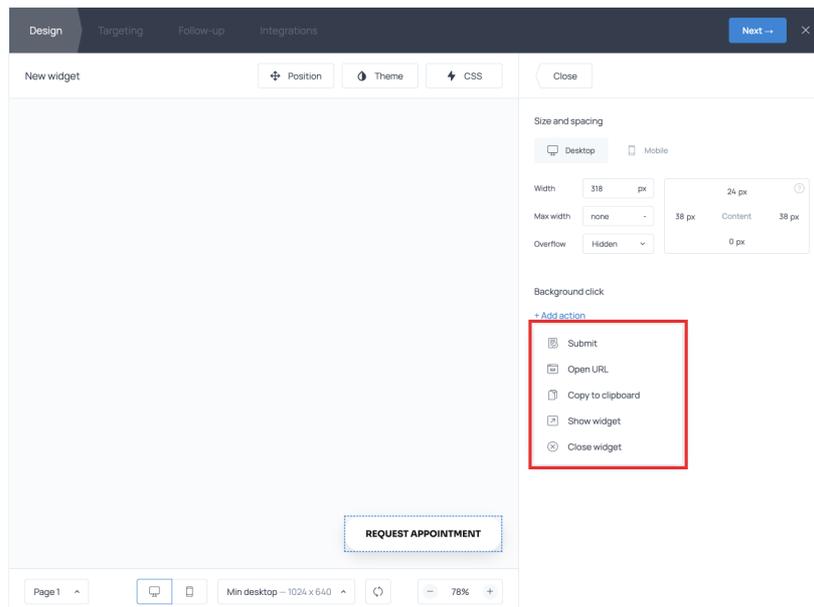
First, in the Targeting settings of the form, find 'Start displaying widget' and remove the default 'automatically' condition 📌



Leave the rest of the default settings intact and activate the form.

Next, open the launcher button in your Getsitecontrol dashboard, and go to the 'Container' section at the top of the menu.

Find the background click settings and remove the default 'Open URL' action. Then, hit + Add action and proceed to 'Show widget'. Select the appointment request form from the list.



Make sure you've indicated the pages where you want to display the button, then save and activate it on your website.

That's it. The form will now pop up when visitors click on the floating button.

## Ready to add an appointment request form to your website?

By now, you are familiar with all the basics of form building. Using the same principles, you'll be able to create any custom form for your website, including online order forms, callback request forms, quote request forms, and more.

Go ahead and try it out with the help of Getsitecontrol!

You're reading Getsitecontrol usecase collection where we talk about the best practices for using website popups. This usecase is a part of Request forms section.