



Getsitecontrol

Add a custom appointment request form to your website

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



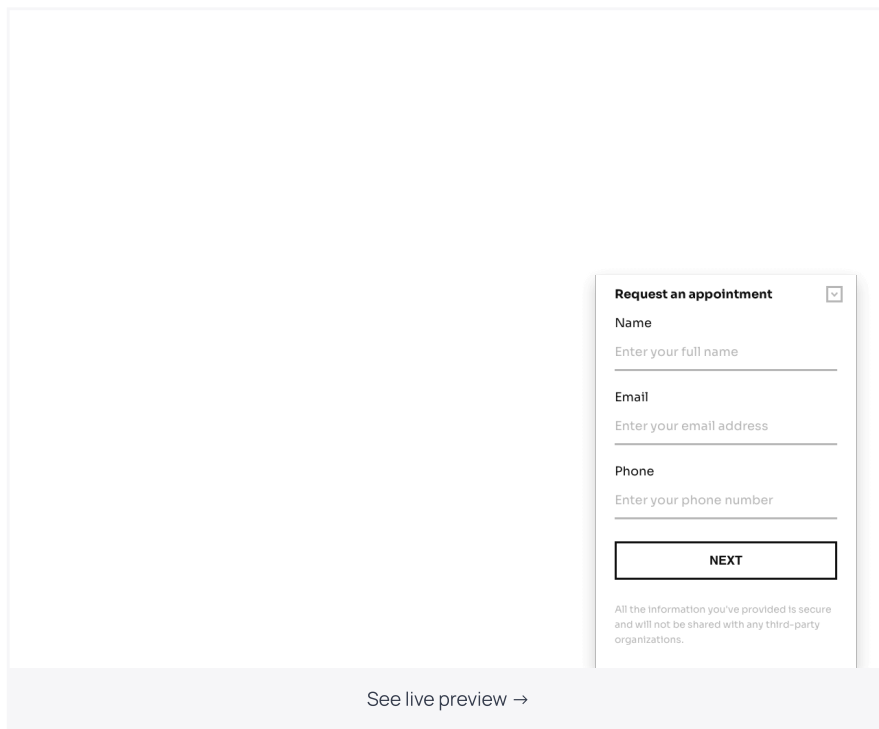
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6 min read

When you're a business owner, managing appointments can quickly get out of hand 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 you're already on the right track if you're looking for a more productive way to manage appointment requests.

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 a appointment request form like this one 🙌



On a 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 just 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.

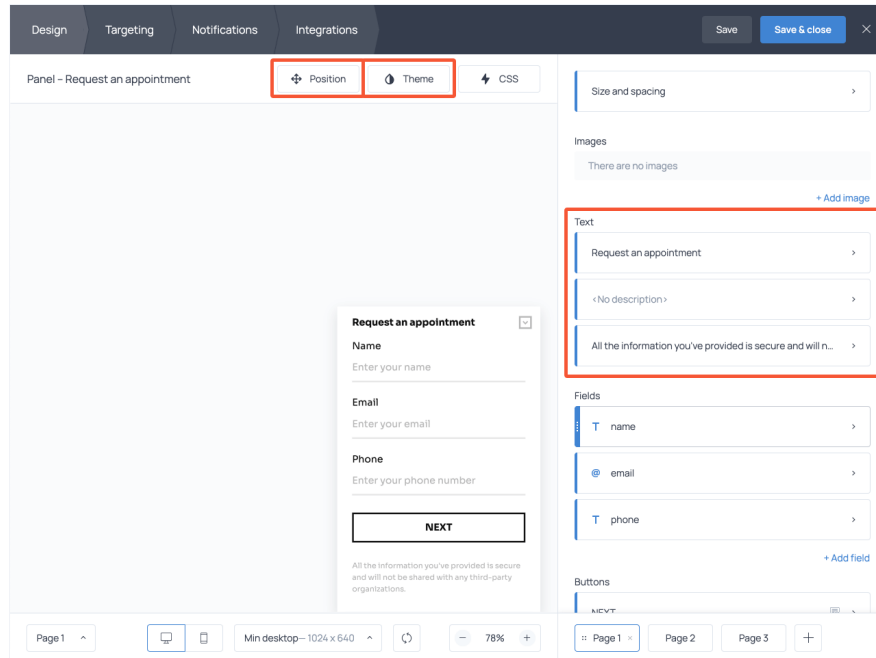
Below, we’ll show you how to set up a form like that for your website using Getsitecontrol. Then, we’ll provide a few tips to ensure people follow through with the submission process.

How to add an appointment request form to your website

Okay, here we go. To create an appointment form for your website, you need to click the template featured above and follow the prompts on the right side to add it to the Getsitecontrol dashboard. From there, you’ll be able to change the text, customize fields, and set up notifications.

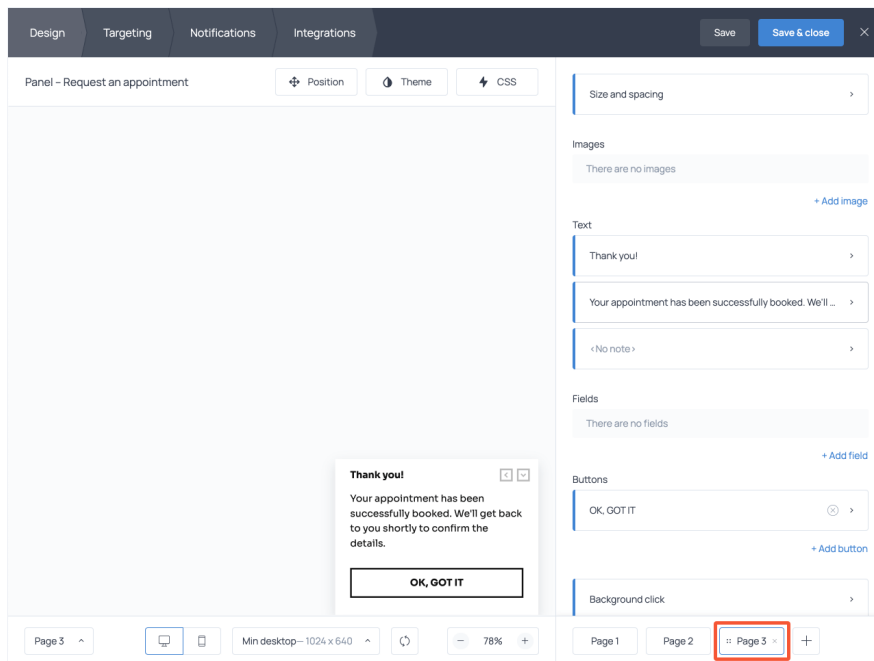
Step 1. Customize the content of the form

On the first screen, you can change 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 and toggle the controls.

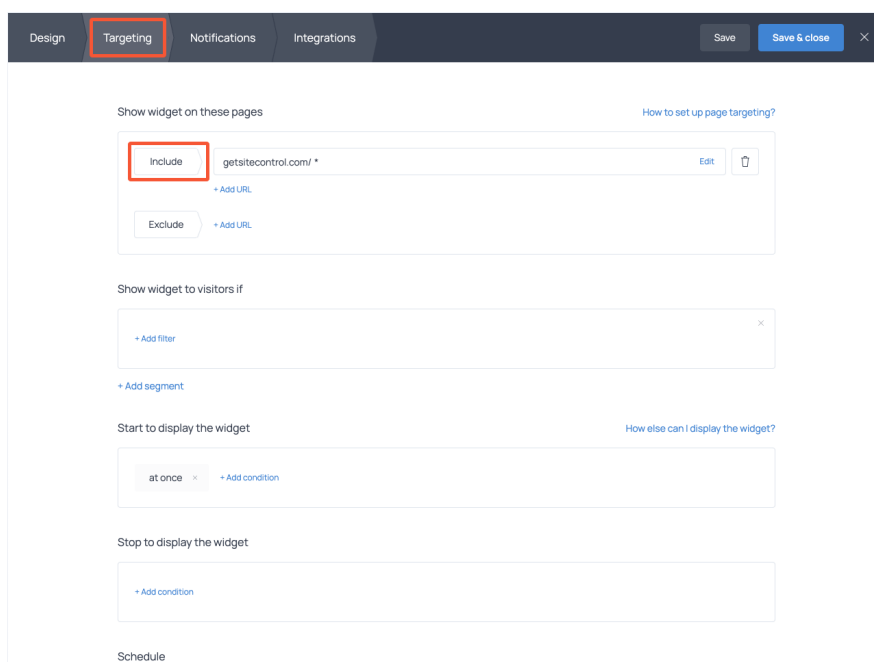
Notice that this form template contains 3 pages. The second page is designed for additional questions; the third page contains a submission success message – a short note confirming that the request has been received 📌



Open **Page 3** in your dashboard to see the default text, and feel free to edit it as well.

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, add the URLs of these page to the ‘Include’ field at the top.

Step 3. Set up notifications

If you want to receive email notifications about new appointment requests, open the **Notification** tab, check the corresponding box, and type your email.

Another thing you can do here is set up an autoresponder: a short automated email that will be sent to every person who fills out the form. There’s no need to connect email marketing software: just tick the ‘Enable autoresponder’ box and type your message.

The screenshot shows the 'Notifications' settings panel. At the top, there are tabs for 'Design', 'Targeting', 'Notifications' (which is selected and highlighted with a red box), and 'Integrations'. In the top right corner, there are 'Save' and 'Save & close' buttons. The main content area is divided into two sections:

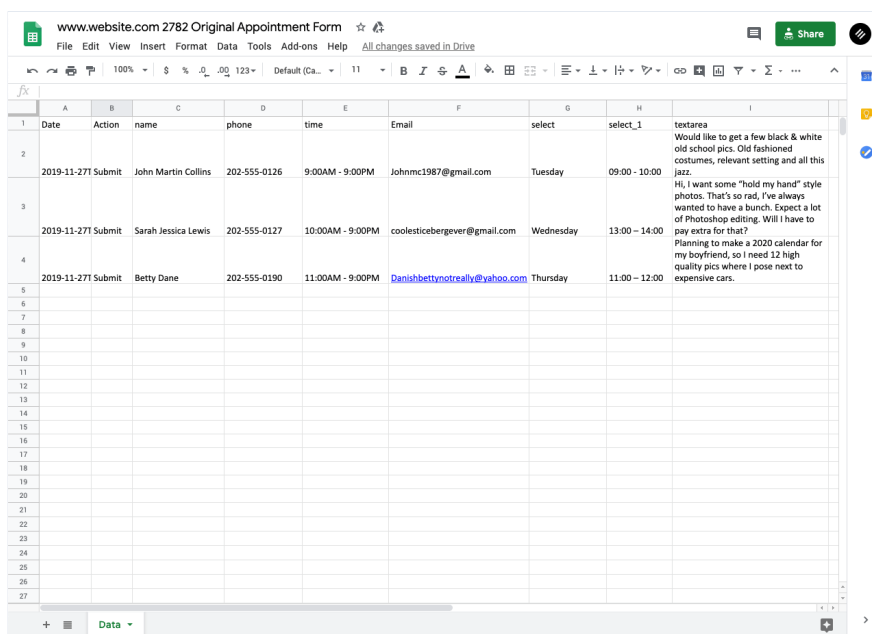
- 1 Enable email notifications:** A checked checkbox is followed by an 'Email' input field containing 'myname@aps.com'.
- 2 Enable autoresponder:** A checked checkbox is followed by three input fields: 'From' (Amazing Photo Studio), 'Subject' (We've received your appointment request), and a rich text editor for the message body. The message body contains 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 {var} day at {var} time.
Feel free to email us at help@aps.com if you have any questions.
Cheers,
Nate

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 in the top right corner and select the variable you need: the date or time of the appointment, for example. Variables are named after field IDs: you can modify them by clicking on each field and simply renaming them.

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 app prompts.

How to download appointment form requests in bulk

For each form you create in Getsitecontrol, there is a statistics section available right in the dashboard. The statistics 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.



The screenshot shows a Google Sheets spreadsheet titled "www.website.com 2782 Original Appointment Form". The spreadsheet contains the following data:

	A	B	C	D	E	F	G	H	I
1	Date	Action	name	phone	time	Email	select	select_1	textarea
2	2019-11-27T	Submit	John Martin Collins	202-555-0126	9:00AM - 9:00PM	Johnmc1987@gmail.com	Tuesday	09:00 - 10:00	Would like to get a few black & white old school pics. Old fashioned costumes, relevant setting and all this jazz.
3	2019-11-27T	Submit	Sarah Jessica Lewis	202-555-0127	10:00AM - 9:00PM	coolesticebergever@gmail.com	Wednesday	13:00 - 14:00	Hi, I want some "hold my hand" style photos. That's so rad, I've always wanted to have a bunch. Expect a lot of Photoshop editing. Will I have to pay extra for that?
4	2019-11-27T	Submit	Betty Dane	202-555-0190	11:00AM - 9:00PM	Danishbettynotreally@yahoo.com	Thursday	11:00 - 12:00	Planning to make a 2020 calendar for my boyfriend, so I need 12 high quality pics where I pose next to expensive cars.
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If you're using 3rd-party cloud apps for your business — for instance, CRM or appointment scheduling tools — you can integrate them with Getsitecontrol (use the Integration tab to do that). This way the data submitted through the form will be sent to the software of your choice.

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 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

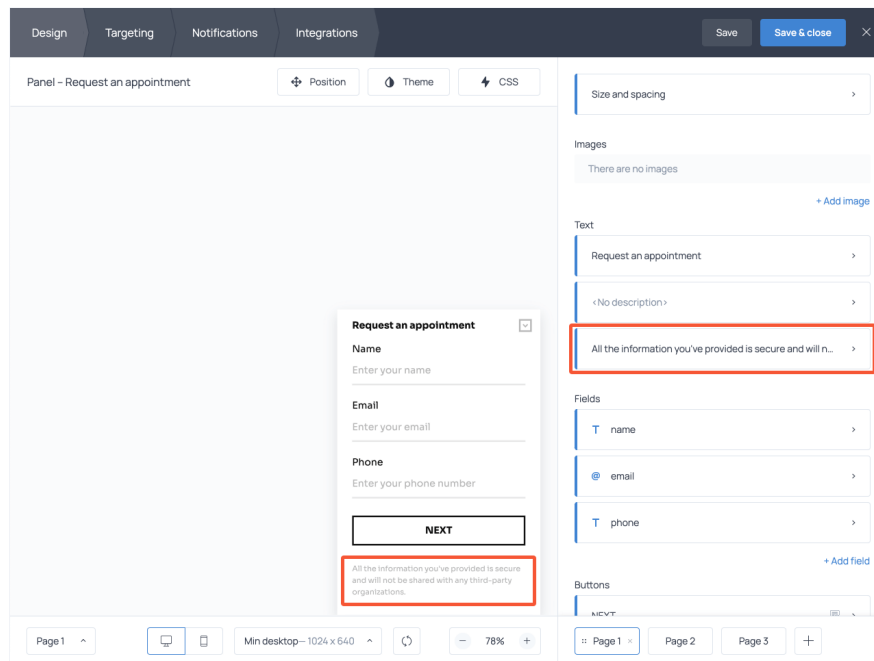
The best practice is to keep field labels concise. However, if you think your prospects might misunderstand the purpose of some fields, you can add a microcopy – a small piece of text written for explanatory purposes.

Here is an example of a clarifying microcopy:

The screenshot shows a form editor interface for a form titled "Panel - Request an appointment". The form is displayed in a preview mode, showing a "Specify details" section with two dropdown menus and a "Comments" field. The "Comments" field has a placeholder text: "Specify the location of the photoshoot and its setting, the photographer, the camera rig, etc." and a "SUBMIT" button below it. A red box highlights the placeholder text in the "Comments" field. The right sidebar shows the "Field ID" as "comment", the "Label" as "Comments", and the "Placeholder" as "Specify the location of the photoshoot and its setting, the phot". A red box highlights the placeholder text in the "Placeholder" section. The interface also includes a top navigation bar with "Design", "Targeting", "Notifications", and "Integrations" tabs, and a right sidebar with "Close" and "Remove field" buttons. The bottom of the interface shows a "Page 2" indicator, a "Min desktop: 1024 x 640" setting, and a "78%" zoom level.

Another great use of a 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 a 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, access the field at the very bottom of the Text section and enter your copy in the Note segment.

4. Create different form types for different pages

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

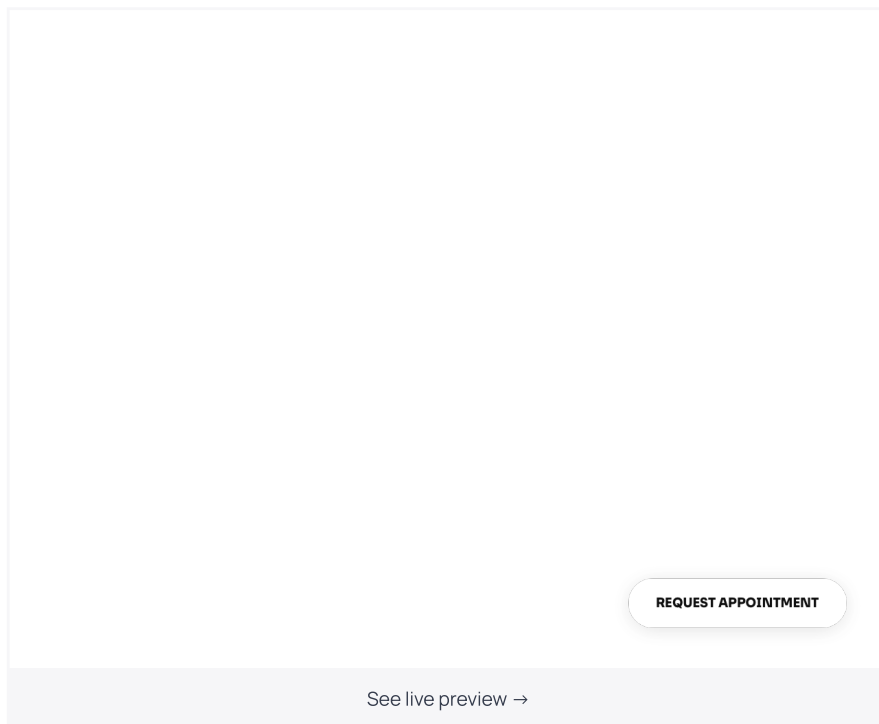
On the one hand, you surely want people to make appointments. On the other hand, you probably don't want to be too pushy displaying the form when your website visitors aren't ready to commit.

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

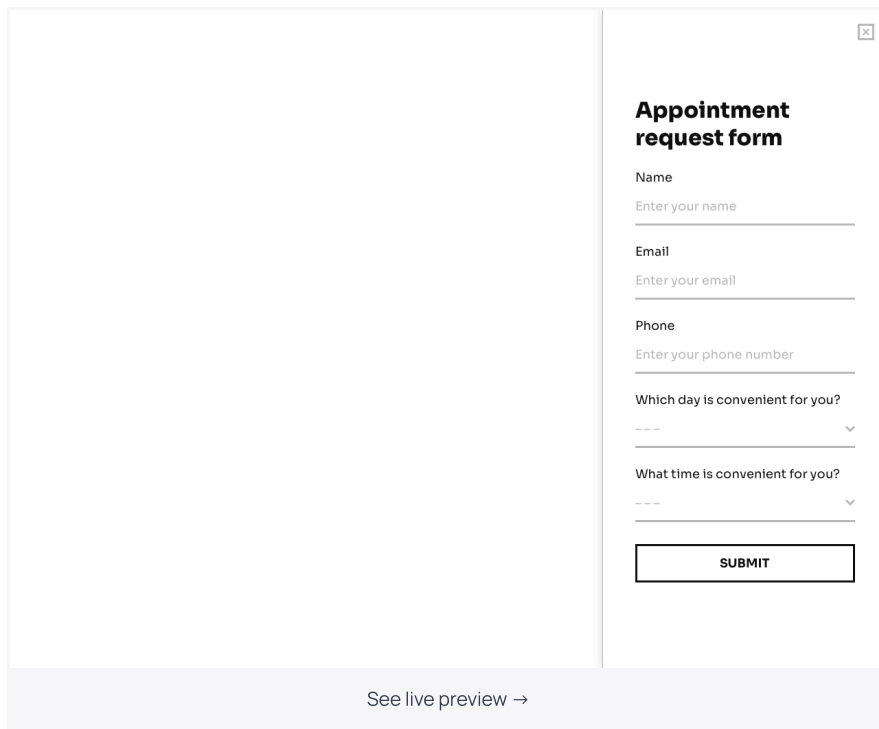
the Contact page, the Pricing page, or the Schedule page. On the remaining pages, you can install a less intrusive panel that expands upon click.

5. Opt for a floating button

If you prefer using floating buttons, Getsitecontrol allows you to use them as well. For example, instead of a panel we featured above, you can place a button like this:



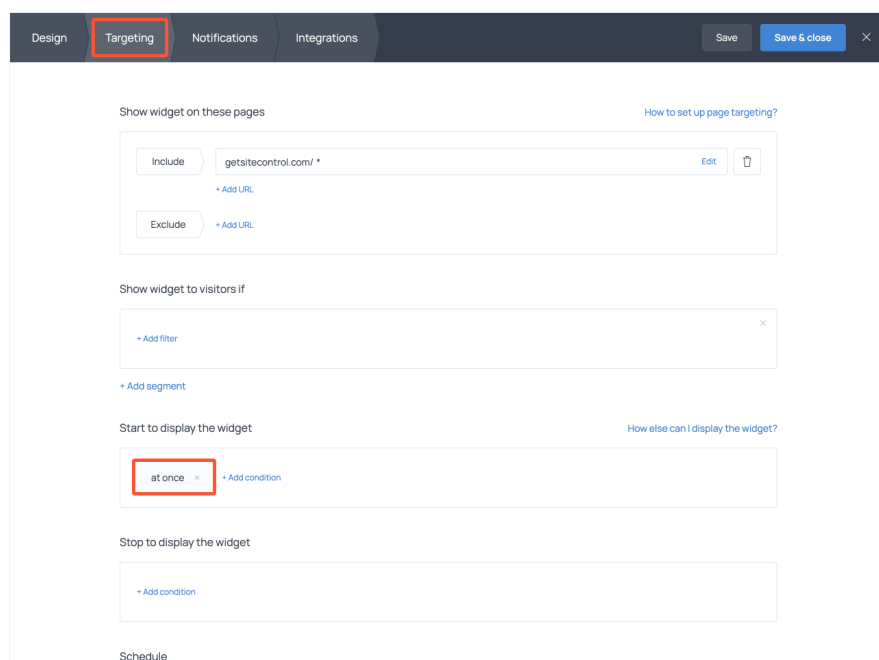
At Getsitecontrol, we call such buttons ‘launchers’, and you can find more examples [in the gallery](#). Launchers are designed to trigger modal popups, fullscreen forms, or sidebars upon click. For instance, if you’re creating an appointment request form, this is what it may look like:



The image shows a preview of an appointment request form. The form is titled "Appointment request form" and includes the following fields: Name (with placeholder "Enter your name"), Email (with placeholder "Enter your email"), Phone (with placeholder "Enter your phone number"), "Which day is convenient for you?" (with a dropdown menu), and "What time is convenient for you?" (with a dropdown menu). A "SUBMIT" button is located at the bottom of the form. Below the form, there is a link that says "See live preview →".

To implement this scenario on your website, you need to add both templates — the launcher and the form — to your Getsitecontrol dashboard. Then you need to connect them so that the button will trigger the form upon click.

Connecting one to another is a matter of few simple steps. First, in the Targeting settings of the form, find 'Start to display the widget' and remove the default 'at once' condition 📌



The image shows the Targeting settings interface for a widget. The interface is divided into several sections: "Show widget on these pages" (with an "Include" field containing "getsitecontrol.com/*" and an "Exclude" field), "Show widget to visitors if" (with an "Add filter" button), "Start to display the widget" (with a dropdown menu showing "at once" selected and a "+ Add condition" button), and "Stop to display the widget" (with an "Add condition" button). The "at once" condition is highlighted with a red box. The interface also includes a "Design" tab, a "Targeting" tab (highlighted with a red box), "Notifications", and "Integrations" tabs, along with "Save" and "Save & close" buttons.

Once you do that, make sure that the rest of the settings are correct and activate the form

Next, open the launcher button in your Getsitecontrol dashboard and scroll down to the Background click settings. Remove the default option, hit + Add action and proceed to 'Show widget.' Select the appointment request form from the list.

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

That's about it. Once you install Getsitecontrol on your website, the form will pop up when visitors click on the button. The installation process is straightforward: you can either follow the prompts right in the app, or get familiar with the instructions.

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.