![promptchat Live Chat Servers logo]

Step by Step guide for setting up forms in Promptchat

Promptchat has a built in form builder which allows users to create all sorts of forms and send them to website visitors either during a live chat session or use them for Automatic Sending when offline. (Great for sales lead generation). Some of the popular uses of these forms are, Newsletter registration, Appointment scheduling, Voucher downloads, Review form, questionnaires) This manual will guide you through the process of creating a form;

1) Log in to your Promptchat account and navigate to Administration/Forms. Click to create a new form. Fill in the Name of the form, title, Intro, Sent, Open message and enter the fields you want to request your website visitor to fill in (in the below example, I ask for a name and email address):

When done, save the Form and Note the name of the form (in this example is: "Try Promptchat FREE".

These are the fields you can request your website visitors to fill in:

Where do these forms go to? How do I retrieve them?

At this stage, you can now push this Form to your website visitor in manual mode by clicking it from this drop down menu (same place where the canned messages are):
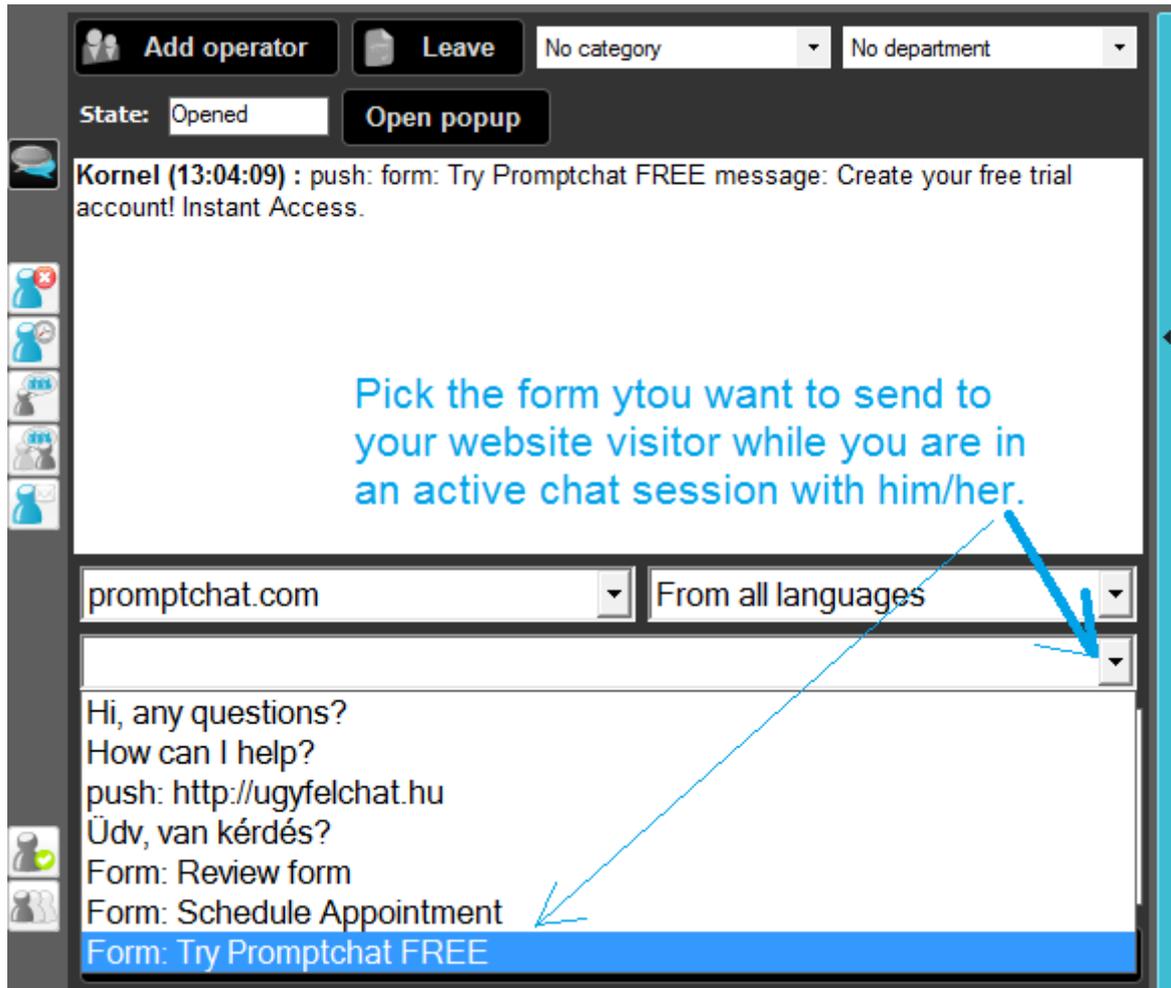
You may assign these forms to an Automatically Opening chatbox too. So when no operators are logged in, the forms can still go out to website visitors – potentially generating you signups, registrations, feedback etc… Here is how you enter this form to automatically display in the chatbox;

Go to Administration/Chatboxes menu and scroll down to Auto open Message. Paste the form here;

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prompt chat **- Edit popup**   ? ✕

Item name	Description	
Default height	Default height of the chat box	
Auto open	Set automatically opening chat box operation	
Require operator to auto op..	Choose whether you want auto invitations to be initiated b..	
Auto open delay	Set the delay for the automatically opening chat box	
Auto open operator name	Operator name in the chat box	
Auto open message	The greeting text	
Auto open 2 delay	2nd Auto-open to Visitors (set the delay here)	
Auto open 2 operator name	Enter the name of the operator .	
Auto open 2 message	Second auto-open message in the chatbox.	

Name: Auto open message

Description: This is the invitation text displayed in the chatbox. Auto invitations go out to every website visitor so make sure the text here applies to everyone.

push: form: Try Promptchat FREE message: Create your free trial account! Instant Access.

Copy this text from the drop down menu in the above image and insert it here as the Auto-open message.

OK   Cancel

Don't forget to enter the Email address where you want to receive the contents of the forms. You can do that in the form builder, here:

Note: The Form builder in Promptchat is integrated with the Newsletter system. Read more about that here; http://promptchat.com/benefits-promptchat-integrated-newsletter-system/