Getting started with Online Forms

Online forms are a wonderful way of collecting information: from potential adopters and volunteers, from community members who want help from your organization, or really, any purpose for which you need to gather contact information and other data. Online forms (primarily adoption forms) can save you enormous amounts of time over using paper forms or sending forms in an email. They enable your visitors to fill out the form and submit it to you without a phone call or email asking for a form, thus eliminating a step in the process and making it easier to adopt. You can set alerts to inform you when a form is completed, so you can immediately respond.
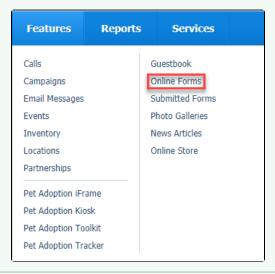
Using the **Online Forms** service, you can create custom online forms such as adoption, volunteer, and foster home applications. You can export a form as a PDF, and easily review forms submitted to you.

You can view a video introduction to our **Online Forms** service:

✅ **Where do I find it?**

From the top menu bar of your account interface, go to **Features > Online Forms**.

On this page:

- Where to Start
- Introduction to Online Forms
- Need help creating your online forms?

Related pages:

- Submitting a Veterinarian Reference Letter
- What should I expect?
- Introductory Email Information
- Logging into your account
- About roles, security, and permissions
- How information is organized in your account
- Finding help in the documentation

The following table lists the actions available for **Online Forms**, along with the level of service where the actions are available and the associated user roles:

Admin	- Sets up and configures online forms - Manages online forms questions - Manages steps for a submitted form - Can view all submitted forms - Can view all comments on submitted forms - Can comment on submitted forms - Can assign a submitted form - Can change submitted form status - Can contact applicant through form - Can complete a form for a contact - Can create, edit and run Online Forms reports with the **Website Service** - Can share blank PDF of online forms - Can edit submitted form answers
Manager	- Can view all submitted forms - Can view all comments on submitted forms - Can comment on submitted forms - Can assign a submitted form - Can change submitted form status - Can contact applicant through form - Can complete a form for a contact - Can change **Pass/Fail** status of step - Can run reports with the **Website Service**
Online Form Reviewer	- Can view all submitted forms - Can view all comments on submitted forms - Can comment on submitted forms - Can assign a submitted form - Can change submitted form status - Can contact applicant through form - Can run reports with the **Website Service**
Online Form User	- Can view all submitted forms - Can view all comments on submitted forms - Can comment on submitted forms - Can assign a submitted form - Can change submitted form status - Can contact applicant through form - Can complete a form for a contact - Can change **Pass/Fail** status of step - Can run reports with the **Website Service**

Where to Start

We recommend these steps before you begin setting up your service:

1. Review the **Getting started with RescueGroups.org guide**.
2. Review this **Getting started with Online Forms** section.
3. Review your **organization's contact information** for accuracy and as a refresher to you.
4. Add your animals. For more information about adding animals, see the **Animals** section of this guide.
5. Enable exports.
6. Add volunteers.

Don't worry. If this is all overwhelming, we're here for you! You can open a support ticket with us at any time.
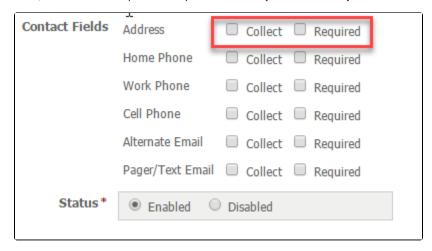
Introduction to Online Forms

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Below is the information that you can collect from your visitors without even adding the questions to your forms.

Notice that you can check **Collect** to add the information to your form, or you can check **Required** to require your visitor to complete the field without moving on to the next question. Any of these fields will be added to your form automatically once you've checked them off. However, if you have selected **Collect**, the visitor is not required to complete that field. Any of the fields that you do not check as collected or required are not added to your forms.

We will walk you through the creation of your first online form, and then give you more details to customize your forms.

Need help creating your online forms?

If you would prefer to have us create your **Online Forms**, please open a support ticket, include your forms, and we will give you a quote.

Popular Questions

We can't find any questions. Check the topic exists.

Have a question about this topic?