Creating Dynamic Lead Forms

Your lead form isn't just a form. It's where inquiries begin — and where revenue starts.

With dynamic lead forms, you can create lead forms that match the way your business actually works — and that flexibility helps turn more inquiries into booked events.

What You'll Get:

- **Better inquiries from the start**
  - Collect the details that matter most so your team can qualify faster and respond with context.
- **More control over the inquiry experience**
  - Customize wording, layout, and placement so your lead form works harder for you.

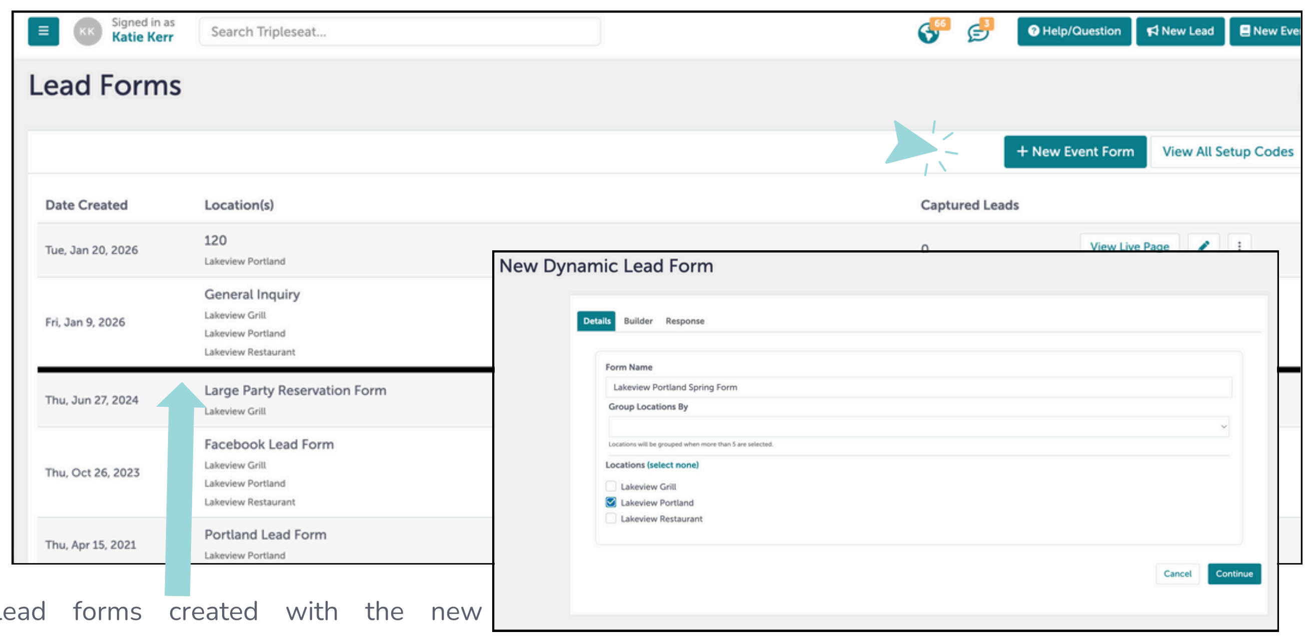
Follow the steps below to see dynamic lead forms work — and how to customize your form without changing the workflow you already rely on.

Create New Lead Form

To use these dynamic customization options, **new lead forms** must be created.

When creating your first Dynamic Lead Form, Tripleseat starts with all of the standard fields and a familiar layout — so you can build on what already works without starting from scratch.

- Navigate to Settings > Lead Forms.
- Select **+ New Event Form.**
- Within the Details section, enter the name of the form and select which location(s) it will apply to.
- Click **Continue** to move to the Builder section.



Lead forms created with the new Dynamic Lead Form builder will appear above the **bold divider.**

Customize

Make Edits

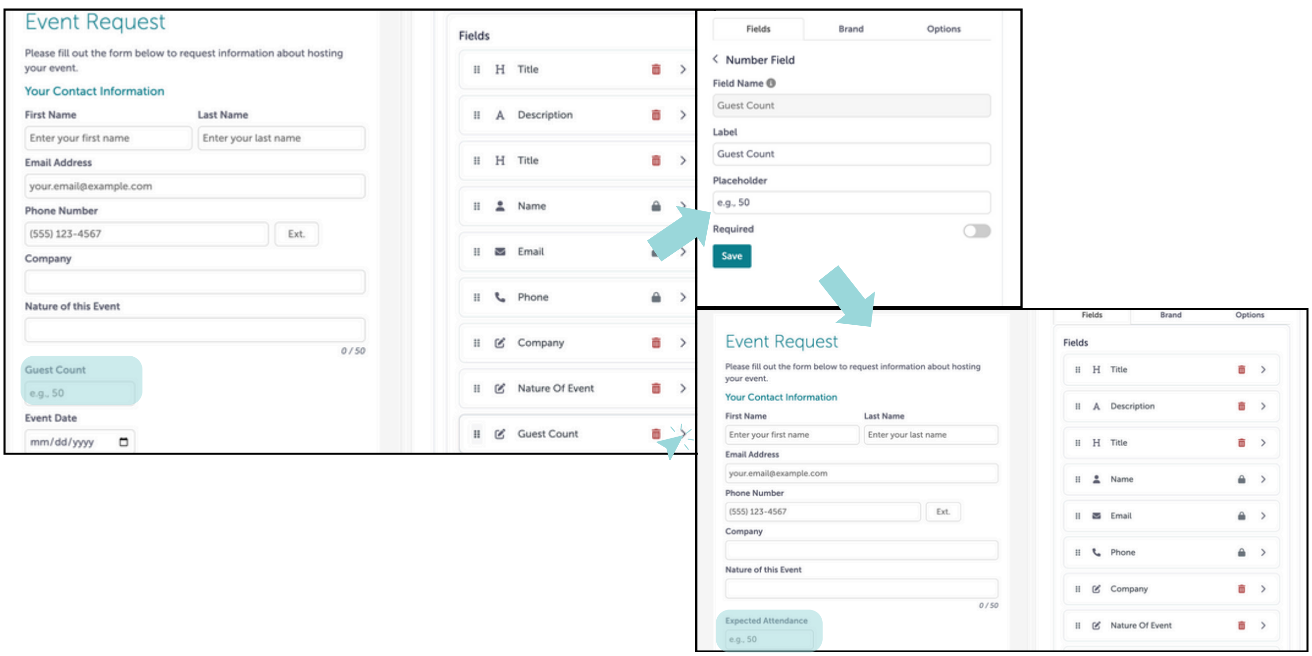
Use the **Builder section** to view a real-time preview of the form with all default fields on the left, and the customization options and tabs on the right.

With the drag-and-drop builder, quickly rearrange fields or update the wording guests see. These small changes help create a clear, polished form that's easy for guests to complete and easy for your team to review.

Customize Your Lead Form

▶ Watch the 2-minute video

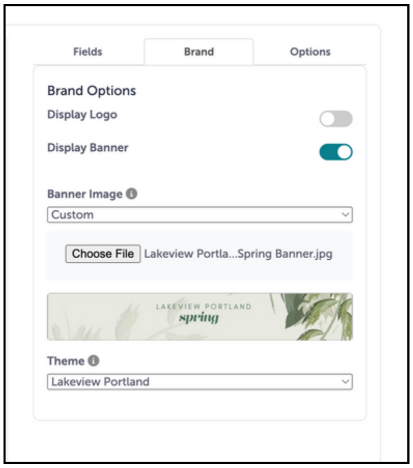
- Within the Fields tab:
    - Drag and drop with the ⠿ to reorder the fields.
    - Select the red trash can to remove the field (name, email and phone number are required and cannot be deleted).
    - Click **>** next to a field to make further customizations, such as label, placeholder, mark as required.
        - When making changes to a field, press **Save** to see the preview update in real time.



Update Branding

Use the **Brand tab** to control the visual appearance of lead forms using logos, banners, or themes.

- On the Brands tab:
    - Click to toggle logo and banner on/off
    - Click the dropdown to choose from existing branding options or select **Custom** to upload a file.



Add Custom Fields

Any custom field your team already uses (like budget ranges, alternate dates, or loyalty numbers) can appear directly on a dynamic lead form. Keep the information connected from inquiry to booking.

Note: Custom fields must already exist before they can be added to a lead form.

Add Custom Fields to Your Lead Form

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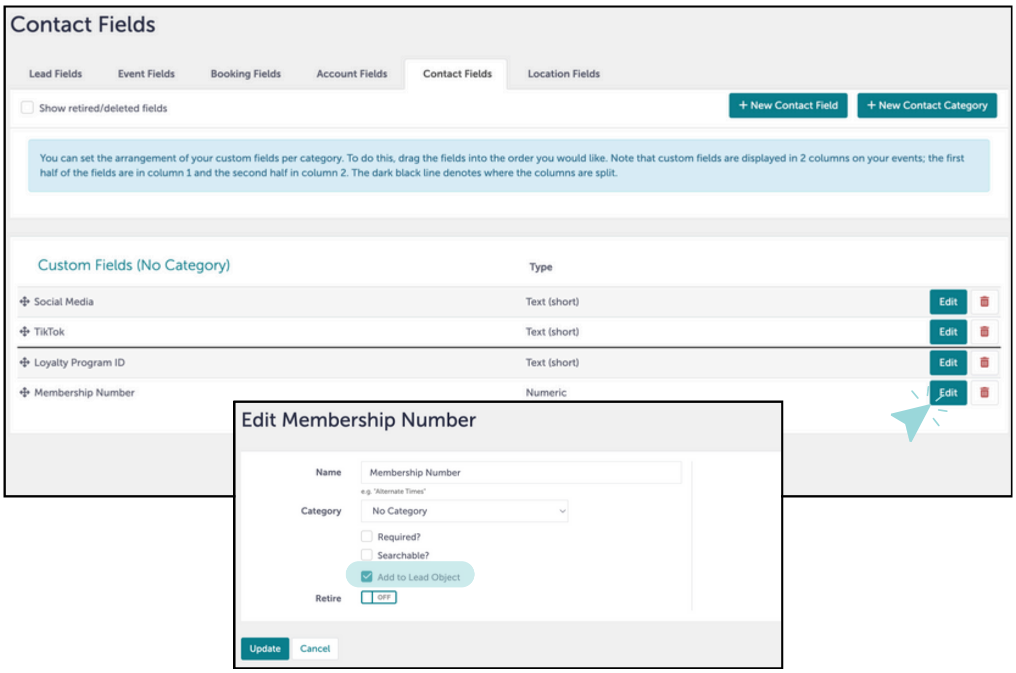
First, link an existing custom field to the Lead:

1. Navigate to Settings > Custom Fields.
2. Select **Edit** next to the custom field you want to use.
3. Select **Add to Lead Object,** then **Update**.

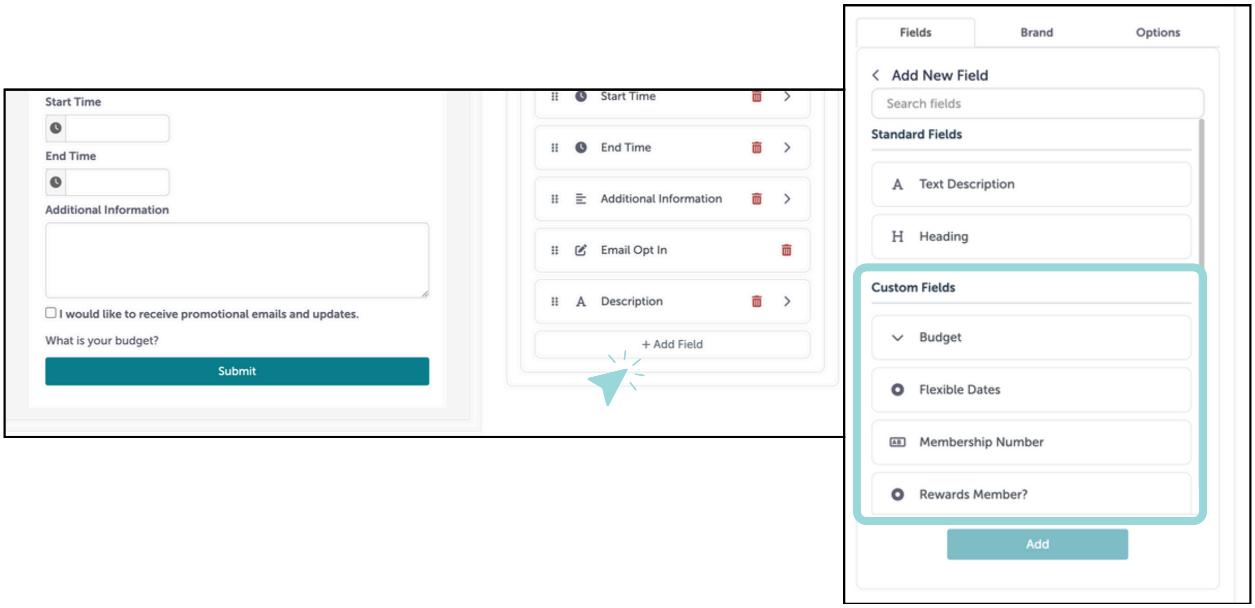
Once linked, the custom field becomes available for use on lead forms.



Next, add that custom field to the lead form:

1. Navigate to Settings > Lead Forms.
2. Open the lead form you want to update.
3. In the Builder, open the Fields tab.
4. Select Add Field and choose the custom field you just linked.

The field will appear on the form and in the live preview automatically.



Configure Options

Use the **Options tab** to set things like lead source tracking and event style selections.

- Lead source tracking helps to understand where inquiries are coming from. It's best practice for me to use a separate lead form for each placement — like Facebook or Instagram — so my reporting stays accurate.

Share Your Lead Form

▶ Watch the 2-minute video

Edit Responses

Use the Response tab to customize what happens after a guest submits a form.

- Make any neccessary edits to:
  - On-screen confirmation message
  - Automatic response email.
  - The email address guest replies are sent to.

Once all sections have been completed, press **Save.**

Duplicate for Scale

Once your first Dynamic Lead Form is set, use the duplicate feature to create variations for different locations, event types, or seasonal promotions. It's the fastest way to scale your intake strategy without rebuilding forms from scratch.

Head to **Settings > Lead Forms** to create your new form today!