

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.

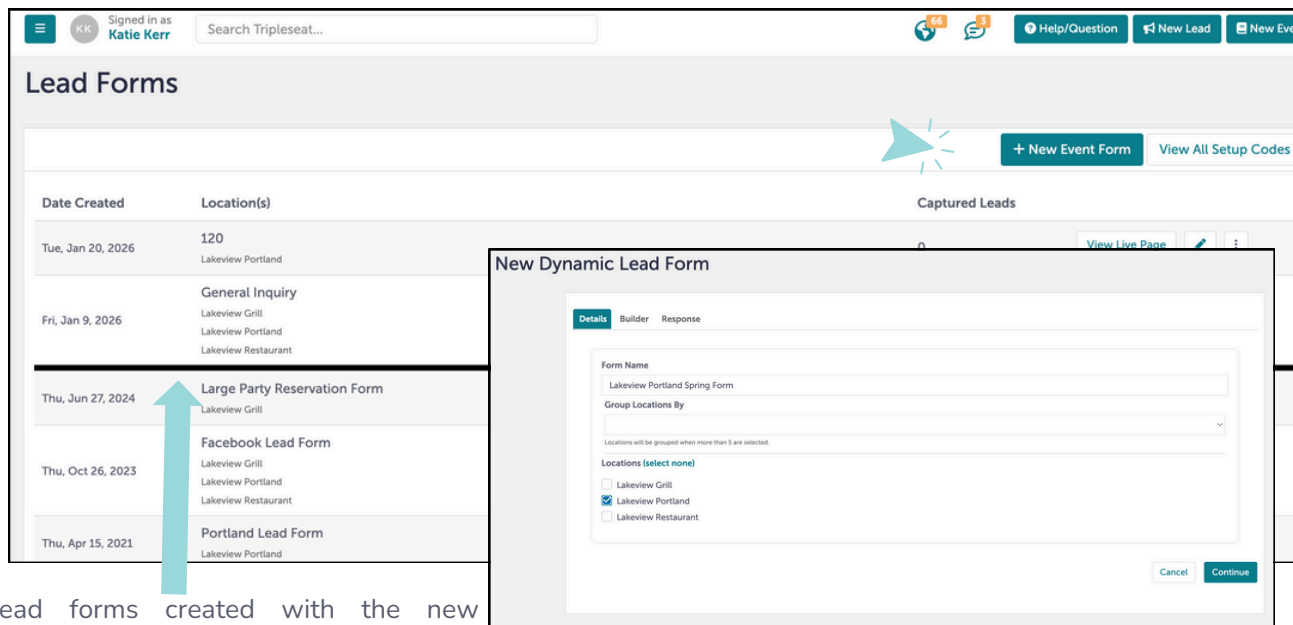
Follow the steps below to see dynamic lead forms work — and how to customize your form without changing the workflow you already rely on.

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.



The screenshot shows the Tripleseat 'Lead Forms' management interface. At the top, there's a navigation bar with a search bar and user information (Signed in as Katie Kerr). Below the navigation bar, there's a '+ New Event Form' button and a 'View All Setup Codes' link. The main area displays a table of existing lead forms with columns for 'Date Created', 'Location(s)', and 'Captured Leads'. A teal arrow points to a new entry, 'Large Party Reservation Form', which is positioned above a bold horizontal divider. A modal window titled 'New Dynamic Lead Form' is open, showing the 'Details' tab. The modal contains a 'Form Name' field with the value 'Lakeview Portland Spring Form', a 'Group Locations By' dropdown, and a 'Locations (select none)' section with three radio button options: 'Lakeview Grill', 'Lakeview Portland' (which is selected), and 'Lakeview Restaurant'. 'Cancel' and 'Continue' buttons are at the bottom right of the modal.

Date Created	Location(s)	Captured Leads
Tue, Jan 20, 2026	120 Lakeview Portland	0
Fri, Jan 9, 2026	General Inquiry Lakeview Grill Lakeview Portland Lakeview Restaurant	0
Thu, Jun 27, 2024	Large Party Reservation Form Lakeview Grill	0
Thu, Oct 26, 2023	Facebook Lead Form Lakeview Grill Lakeview Portland Lakeview Restaurant	0
Thu, Apr 15, 2021	Portland Lead Form Lakeview Portland	0

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


Customize

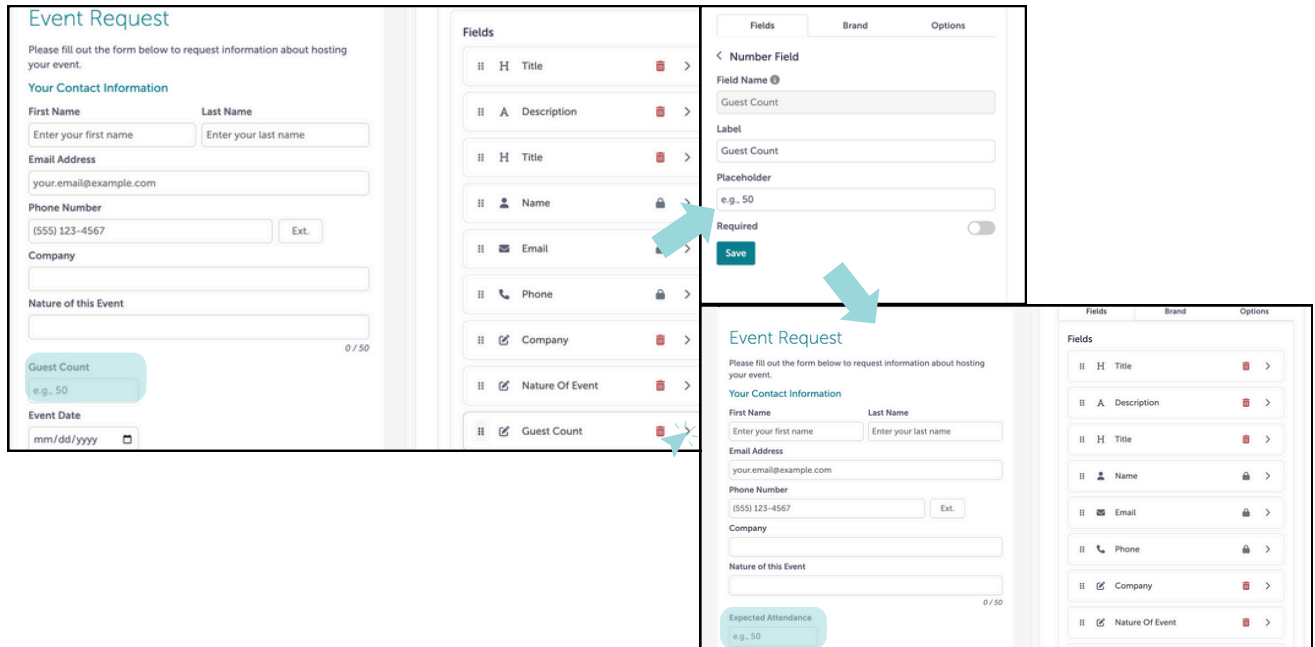
Make Edits

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.



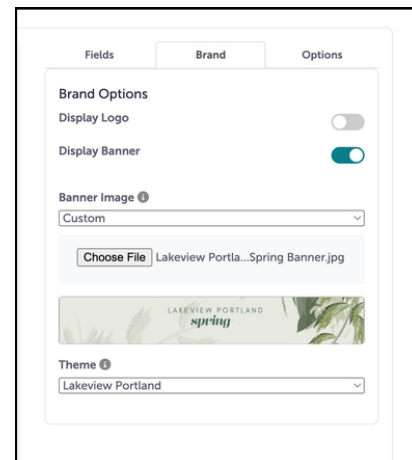
- Within the Fields tab:
 - Drag and drop with the  to reorder the fields.
 - Select the red trash can to remove the field (name, email and phone number are required and cannot be deleted).
 - Click > next to a field to make further customizations, such as label, placeholder, mark as required.
 - When 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

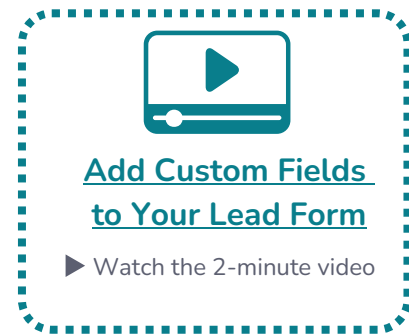
Any custom field your team already uses (like budget ranges, alternate dates, or loyalty numbers) can appear directly on a dynamic lead form. Keep the information connected from inquiry to booking.

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

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.



Contact Fields

Lead Fields | Event Fields | Booking Fields | Account Fields | **Contact Fields** | Location Fields

Show retired/deleted fields + New Contact Field + New Contact Category

You can set the arrangement of your custom fields per category. To do this, drag the fields into the order you would like. Note that custom fields are displayed in 2 columns on your events; the first half of the fields are in column 1 and the second half in column 2. The dark black line denotes where the columns are split.

Custom Fields (No Category)	Type	
↕ Social Media	Text (short)	Edit ✖
↕ TikTok	Text (short)	Edit ✖
↕ Loyalty Program ID	Text (short)	Edit ✖
↕ Membership Number	Numeric	Edit ✖

Edit Membership Number

Name:

Category:

Required?

Searchable?

Add to Lead Object

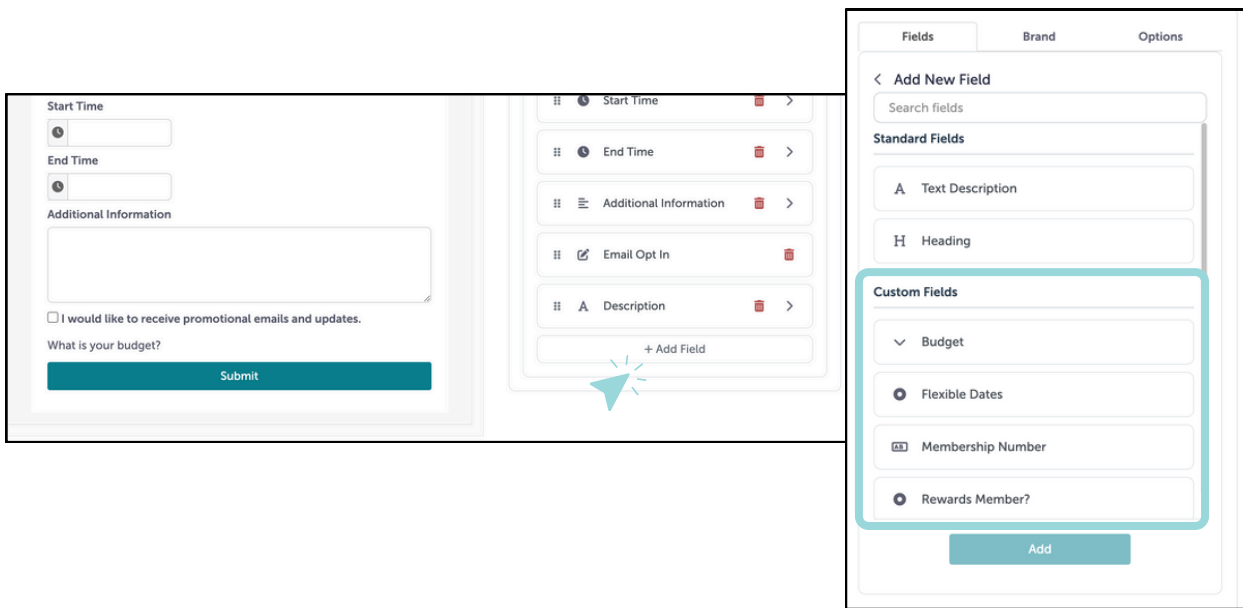
Retire: OFF

Update Cancel

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.



Edit Responses

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

- Make any necessary 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!