

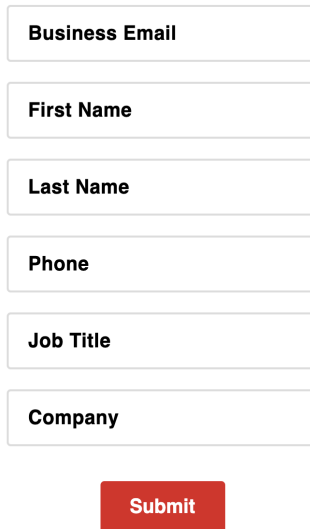
FormComplete Implementation Guide

For administrators implementing FormComplete with ZoomInfo Sales or Marketing

Implementation Overview	3
Create a New Form (Automatic Mapping)	7
Create a New Form (Manual Mapping)	13
Test and Enable FormComplete	19
Map More Forms	20
Best Practices for FormComplete	20
Reviewing Form Analytics	24
Data Sharing	27
Privacy Compliance	29

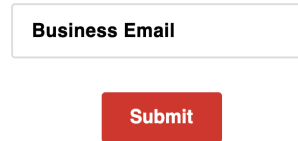
Traditional forms attempt to capture all of the detail marketers want about the user completing the form by requiring the user to provide it. Some users may be daunted by the amount of information they are asked to provide, in many cases exiting the process altogether. FormComplete enables marketers to capture data by matching the user's email address and instantly enriching the remaining form fields with accurate B2B data from ZoomInfo.

Traditional Form



A vertical stack of six white rectangular input fields with thin black borders. Each field contains a label in bold black text: 'Business Email', 'First Name', 'Last Name', 'Phone', 'Job Title', and 'Company'. Below the last field is a red rectangular button with the word 'Submit' in white text.

FormComplete-powered Form



A single white rectangular input field with a thin black border, containing the label 'Business Email' in bold black text. Below the field is a red rectangular button with the word 'Submit' in white text.

Dynamically display more fields on forms: When a user provides an email address, the form can dynamically expand to show fields for which ZoomInfo does not have data - providing an opportunity for your organization to capture this data.

Capture hidden fields: You can also choose whether or not to display additional fields in the form. By mapping to fields marked as hidden, you can capture additional data without increasing the amount of fields a prospect has to fill out.

NeverBounce email address validation: Email address validation is powered by NeverBounce, instantly determining the validity of a provided email address and enabling actions based on the status. For example, the form can be configured to disable the Submit button if an invalid email address is provided.

Review analytics: The FormComplete Analytics page provides details about your form activity over time and insights into the personas submitting the forms.

Implementation Overview

Review the following information and considerations before you implement FormComplete.

Once you've configured FormComplete as described in this guide, you'll enable it by adding the *ZoomInfo Script* to your web page HTML. The ZoomInfo Script:

- Is "installed" in your site's web pages by either manually copy-pasting it into the page HTML, or by using Google Tag Manager to associate the script with your web pages.
- Is a single script that supports other ZoomInfo products you may have, including WebSights, Schedule, and Chat.
- Enables tracking of company behavior on every web page you choose to track.

Using a Test Form

To experiment with FormComplete's features and options, we recommend implementing FormComplete on a test form that is based on your production form.

Content Security Policy Considerations

If a content security policy is enabled on your site, the following domains must be whitelisted in the respective policy directives. If the directive listed for a given domain is not restricted by your content security policy, it does not need to be whitelisted and can be ignored.

Policy Directive	Domain	Explanation
script-src	js.zi-scripts.com	ZoomInfo Script
script-src	ws-assets.zoominfo.com	FormComplete script
connect-src	ws.zoominfo.com	FormComplete API calls
script-src	schedule.zoominfo.com	Schedule script (if using the Schedule feature with FormComplete and ZoomInfo Marketing)
connect-src	api.schedule.zoominfo.com	Schedule API calls (if using the Schedule feature with FormComplete and ZoomInfo Marketing)

For a full list of cookies used with the ZoomInfo Script, see [this article](#).

Implementation Roles

Implementing FormComplete typically requires coordination between two distinct roles.

Marketing Operations role: A marketing operations person understands the logic for what they want to track and capture.

Developer role: A developer in your organization assists with enabling, testing, and debugging FormComplete. Specific skills needed for the developer role include:

- HTML
- Javascript
- CSS

FormComplete Concepts

Review the following concepts.

ZoomInfo Script

Organizations with multiple forms on their website can install a single ZoomInfo Script on their web pages. Once the ZoomInfo Script is installed, you do not need to add anything else to your website.

The ZoomInfo Script is provided in the ZoomInfo Admin Portal (**Company Settings > ZoomInfo Script**). Any forms that you have currently mapped or add later in FormComplete will utilize this script.

Automatic or Manual Mapping

Ideally, you can implement FormComplete using Automatic Mapping by providing your form URL, mapping your form fields to ZoomInfo fields, and implementing the ZoomInfo Script on your website.

Automatic Mapping requires that the form meets the following two conditions:

- Your form has a form ID as a unique identifier and unique field identifiers called input name.
- FormComplete can load the form in an iFrame in the application.

If these conditions are not met for the form, you must use Manual Mapping. This mode lets you select another field in your form to serve as the unique identifier and manually add the form inputs that you want to map to ZoomInfo fields. You can then implement the ZoomInfo Script on your website.

Advanced Settings and Options

When configuring your form mapping using [Automatic](#) or [Manual Mapping](#), you can choose the following advanced settings and options.

Advanced Settings (Optional)

Replicate across all webpages with same form ID ⓘ

☒

Abandoned Form Tracking ⓘ

☒

Form Shortening ⓘ

☐

Match IP address for unmatched emails ⓘ

☐

Domain Whitelisting ⓘ

+ Add New

zoominfo.com (Auto-Detected)

Developer Settings

Developer Mode ⓘ

☐

No Focus ⓘ

☐

Form Load Timeout (milliseconds) ⓘ

4000

You can also try [Manual Mapping](#) ⓘ

Save & Exit

Previous Step

Next

The following sections describe these options in more detail.

Replicate Across All Web Pages with the Same Form ID

Enable this option to replicate FormComplete on all forms with the same form ID across all web pages on which the ZoomInfo Script is added.

For example, you may have a HubSpot form that has the same form ID that's used on three different pages on your website. Once you map this form on one page, enable the **Replicate across all webpages with same form ID** setting, and install the script across all of the pages, FormComplete is now enabled for this form on the other two pages on your website.

Abandoned Form Tracking

A person who begins submitting a form but bails out before they submit can be a missed opportunity. With abandoned form tracking, you can access this information to drive targeted campaigns.

When a person enters a valid email address on a form tracked by FormComplete - but does not submit - they are considered as having abandoned the form.

You can display abandoned form results in the FormComplete **Analytics** tab, and export the results. One credit is charged for every match made on an abandoned form.

Product Technical Documentation

5

Analytics

Management

Form name: Abandoned-Take-3

Export to CSV

Open in Search

Display:

Dates

05/19/2021 - 06/08/2021

Forms in specific pages

Search specific pages

Submission Types:

Submitted

Abandoned

All

3 Results

Date	Contact Email	NeverBounce <div></div>	Company	First Name	Last Name	Phone	Job Title
05/19/2021	hila.nir@zoominfo.com	-	<div></div> Zoominfo	Hila	Nir	(617) 500-4900	Chief Product Officer
05/19/2021	henry.schuck@zoominfo.c...	-	<div></div> Zoominfo	Henry	Schuck	(360) 783-6816	Founder & Chief Exe...
05/19/2021	david.tiberi@zoominfo.com	-	<div></div> Zoominfo	-	-	-	-

Form Shortening

Enable the Form Shortening option to shorten forms by hiding all mapped fields except the email field. This option also lets you control fields displayed to the form submitter based on the information they provide. For example, if the user provides an email address that is matched, but ZoomInfo does not have a direct phone number, your form can dynamically display a direct phone number field to capture this data from the user.

Domain Whitelisting

Domain Whitelisting ensures that the ZoomInfo Script is usable only on domains that you select. This ensures that FormComplete requests for ZoomInfo data are blocked from any domain other than those that are listed.

Match IP Addresses for Unmatched Emails

In some cases, a form submitter will provide an email address that cannot be matched to a business email address in ZoomInfo. You can configure FormComplete to attempt to match form submitter information based on their organization's IP address.

For example, a form submitter on a corporate network connection may provide a Gmail address. In this case, a match can be attempted based on the IP address if it cannot be made using the email address or domain.

HubSpot iFrame Form (Manual Mapping Only)

If you are manually mapping a HubSpot form that loads from an iFrame, this option will dynamically display on the Advanced Settings page after you configure the mapping. Ensure that this toggle is set to ON to enable **HubSpot iFrame Form** support.

Developer Settings

You can enable certain developer settings to facilitate testing during FormComplete implementation. Settings include:

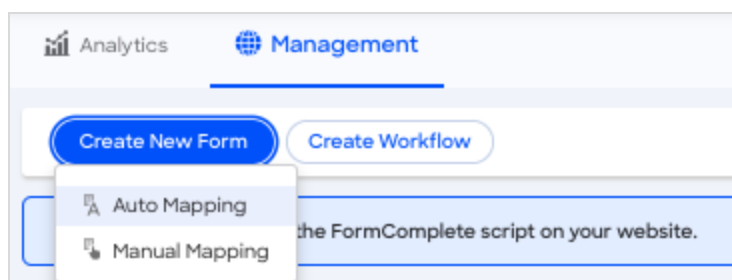
- **Developer Mode** - This mode shows static values for mapped fields (so credits are not consumed during testing), and ensures form submissions during testing are not blocked for too many requests. Developer mode should not be enabled on live forms.

- **No Focus** - Prevents FormComplete from simulating a user selecting each of the mapped fields when an email is entered. This can stop validation messages from appearing when no data is returned to fields.
- **Form Load Timeout (milliseconds)** - The max time of waiting for a slow-loading form to render on the page. Note that this value rarely needs to be updated.

Create a New Form (Automatic Mapping)

To create a new form using Automatic Mapping:

1. Log in to ZoomInfo as an admin and navigate to **FormComplete > Management**.
2. Click **Create New Form > Auto Mapping**.



The Form Mapping wizard displays, walking you through the process of selecting and mapping the form.

Before You Begin

This procedure focuses on the process of creating and mapping your *first form* in FormComplete.

For your first form, you will:

1. Provide the form URL.
2. Select the form.
3. Map form fields to ZoomInfo fields.
4. Configure any advanced settings.
5. Install and verify the ZoomInfo Script across all pages on your website.

For subsequent forms, the process is simplified, as you or your web developer has already verified and installed the ZoomInfo Script across your site. After you complete steps 1-4 above, you'll simply publish the form and the additional form will be managed and tracked in FormComplete.

Differences in the process when mapping subsequent forms are called out within this procedure.

Step 1: Enter URL

Enter the URL of your form and click **Apply**.

The screenshot shows the 'Form Mapping' wizard in the FormComplete interface. On the left is a vertical sidebar with five steps: 'Enter URL' (selected with a blue circle), 'Select Form', 'Map Form', 'Advanced Settings', and 'Install Script'. The main content area is titled 'Let's Get Started' and contains a 'Form URL' input field with the text 'https://www.zoominfo.com/pricing'. To the right of the input field is a blue 'Apply' button. Below the input field, a paragraph states: 'Using the URL, FormComplete determines whether you can continue with Automatic Mapping, or need to use Manual Mapping.' To the right of this text are three bullet points, each preceded by a gear icon: 'FormComplete prevents you from wasting a prospect's time with long online forms', 'Website visitors turn into conversions faster than ever before with FormComplete', and 'Receive additional data about prospects at the time of form submission when using FormComplete'. At the bottom left of the main area is a link 'You can also try Manual Mapping' with an information icon. At the bottom right are 'Cancel' and 'Next' buttons. A 'Help' button is located in the top right corner of the interface.

Using the URL, FormComplete determines whether you can continue with Automatic Mapping mode, or need to use Manual Mapping mode instead:

- If your form meets the conditions for Automatic Mapping described in [Automatic or Manual Mapping](#), you can continue configuring the mapping settings in Automatic Mapping mode using the wizard.
- If the form does not meet the Automatic Mapping conditions, you can transition to Manual Mapping mode by clicking the **Manual Mapping** link. See [Create a New Form \(Manual Mapping\)](#) for configuring FormComplete in this mode.

Step 2: Select Form

Some URLs may include more than one form. In this case, click on the form you want to connect and click **Next**. If only one form is shown, click **Next**.

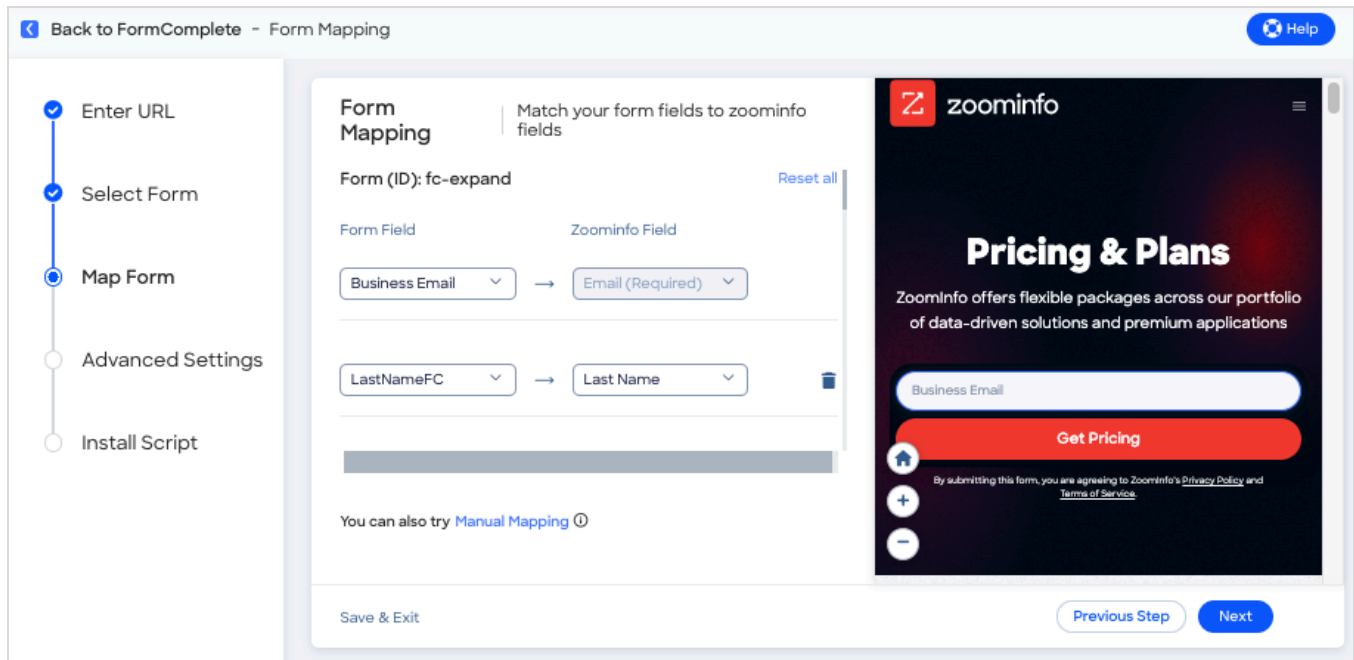
The screenshot displays the 'Form Mapping' interface. On the left, a vertical sidebar contains five steps: 'Enter URL' (checked), 'Select Form' (active), 'Map Form', 'Advanced Settings', and 'Install Script'. The main area is titled 'Select a Form' and shows '1 Forms Found'. Below this, a text prompt asks the user to select a form. A single form is listed with the ID 'fc-expand' and '93 Fields'. At the bottom of this section, there is a link for 'Manual Mapping' and a 'Save & Exit' button. On the right, a preview of the selected form is shown, titled 'Form (ID): fc-expand' and '1 of 1'. The preview displays the 'zoominfo' logo, a 'Pricing & Plans' heading, a description of flexible packages, a 'Business Email' input field, a red 'Get Pricing' button, and a footer with a disclaimer. At the bottom right of the preview, there are 'Previous Step' and 'Next' buttons.

Note: If you've previously mapped this form, it will be grayed out.

Step 3: Map Form

FormComplete will auto-fill certain fields based on information detected in your form.

1. Make sure that you review each of the suggested mapping line items and adjust them as needed.



The screenshot shows the 'Form Mapping' interface in FormComplete. On the left is a sidebar with a progress indicator showing five steps: 'Enter URL' (checked), 'Select Form' (checked), 'Map Form' (active), 'Advanced Settings' (unchecked), and 'Install Script' (unchecked). The main area is titled 'Form Mapping' with the subtitle 'Match your form fields to zoominfo fields'. It shows 'Form (ID): fc-expand' and a 'Reset all' link. Below this is a table with two columns: 'Form Field' and 'Zoominfo Field'. The first row maps 'Business Email' to 'Email (Required)'. The second row maps 'LastNameFC' to 'Last Name'. There is a trash icon to the right of the second row. Below the table, it says 'You can also try [Manual Mapping](#)'. At the bottom are 'Save & Exit', 'Previous Step', and 'Next' buttons. On the right, a preview of the 'Pricing & Plans' form is shown, featuring a 'Business Email' input field and a 'Get Pricing' button.

You are required to map the **Form Field** that corresponds to the email address and map it to the **ZoomInfo Field** for Email.

2. Continue reviewing the mapped field suggestions and adding other form fields for which you want ZoomInfo data returned by clicking **Add Field** to map each **Form Field** to a corresponding **ZoomInfo Field**.
3. Click **Next**.

Step 4: Advanced Settings

For details about each of the advanced settings, see [Advanced Settings and Options](#).

The screenshot shows the 'Advanced Settings (Optional)' configuration page. On the left is a vertical navigation menu with five steps: 'Enter URL', 'Select Form', 'Map Form', 'Advanced Settings' (which is the active step, indicated by a blue circle), and 'Install Script'. The main content area is titled 'Advanced Settings (Optional)' and contains several toggle switches and a text input field. The toggles are: 'Replicate across all webpages with same form ID' (ON), 'Abandoned Form Tracking' (ON), 'Form Shortening' (OFF), 'Match IP address for unmatched emails' (OFF), and 'Domain Whitelisting' (OFF) with a '+ Add New' link. Below these is a text input field containing 'zoominfo.com (Auto-Detected)'. The 'Developer Settings' section includes 'Developer Mode' (OFF), 'No Focus' (OFF), and 'Form Load Timeout (milliseconds)' (4000). At the bottom, there is a link to 'Manual Mapping' and buttons for 'Save & Exit', 'Previous Step', and 'Next'. A 'Help' button is located in the top right corner.

1. Turn the toggles ON or OFF in the **Advanced Settings (Optional)** section.

This close-up view of the 'Advanced Settings (Optional)' section shows the following settings:

- Replicate across all webpages with same form ID ☐
- Abandoned Form Tracking ☒
- Form Shortening ☐
- Match IP address for unmatched emails ☒
- HubSpot iFrame Form ☐
- Domain Whitelisting ☐ [+ Add New](#)

Below the toggles is a text input field with the placeholder text: 'Currently there are no whitelisted domains.'

2. In the **Developer Settings** section, you can choose some options to help facilitate better testing during implementation. See [Developer Settings](#) for more details.

Developer Settings

Developer Mode ⓘ

No Focus ⓘ

Form Load Timeout (milliseconds) ⓘ

4000

3. Your next action depends on the following:

- If this is your first form, click **Next** to go to the **Install Script** page.
- If this is a subsequent form, and you've already installed the ZoomInfo Script on your website, click **Publish**.

Step 5: Install the ZoomInfo Script

Note: This step will only be presented if you're mapping your first form. This step *will not be presented* if you've already mapped your first form and successfully installed and verified the ZoomInfo Script on your website.

Back to FormComplete - Form Mapping
Help

Enter URL

Select Form

Map Form

Advanced Settings

Install Script

FormComplete Script Installation

In order to activate FormComplete, you must paste a snippet we provide into the code of your website. If pasting a tracking code is not something you normally do, we recommend asking a webmaster, developer, or marketing analytics specialist to paste the code for you.

To install, copy the HTML snippet and paste it at the end of the <body> tag of your webpage. You can also use Google Tag Manager to install this snippet.

FormComplete script

Install the script on your website.

Copy

▼

Send this script to your webmaster

john@abc.com, jack@xyz.com

Send email

Learn how to install the snippet

Play Tutorial

Or go to the

Implementation Guide

Save & Exit

Previous Step

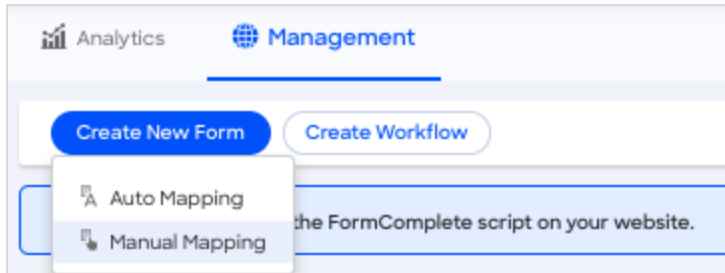
Verify & Publish

👉 See "Installing the ZoomInfo Script" in the [ZoomInfo Script Implementation Guide](#) for simple instructions on how to copy the script or send it to a webmaster to implement on your site.

Once you've installed the script, return to the [Test and Enable FormComplete](#) section in this guide to complete the implementation and learn more about getting value from FormComplete.

Create a New Form (Manual Mapping)

1. Log in to ZoomInfo as an admin and navigate to **FormComplete > Management**.
2. Click **Create New Form > Manual Mapping**.



The Form Mapping wizard displays, walking you through the process of selecting and mapping the form.

Before You Begin

This procedure focuses on the process of creating and mapping your *first form* in FormComplete.

For your first form, you will:

1. Provide the form URL.
2. Select the form.
3. Map form fields to ZoomInfo fields.
4. Configure any advanced settings.
5. Install and verify the ZoomInfo Script across all pages on your website.

For subsequent forms, the process is simplified, as you (or your web developer) has already verified and installed the ZoomInfo Script across your site. After you complete steps 1-4 above, you'll simply publish the form and the additional form will be managed and tracked in FormComplete.

Differences in the process when mapping subsequent forms are called out within this procedure.

Step 1: Enter URL

Provide the **Form URL** and click **Next**.

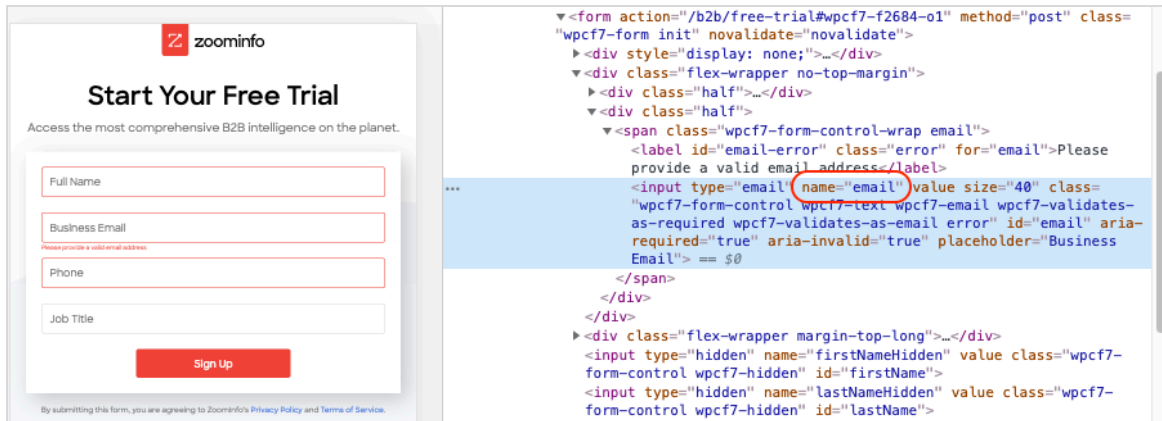
Step 2: Map Form

1. Select the **Form Identifier**.

Your Form Identifier is a unique identifier for your form. In Manual mode, FormComplete does not auto-detect your form ID, and some forms may not have a form ID.

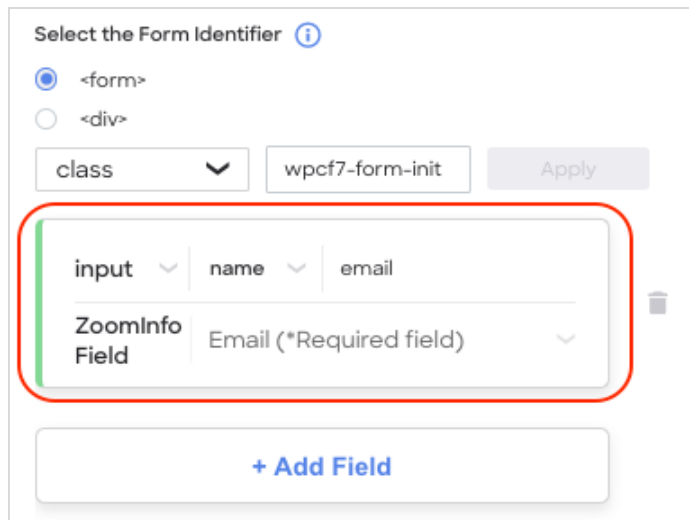
- Inspect your form's underlying HTML code to determine if it has a form ID and copy/paste it here.
 - For HubSpot forms that use data-form-ID, you can select data-form-ID from the dropdown and copy/paste the data-form-id.
 - If your form does not use a form ID, you can use the <div> option to select a class, data-field-name, or another identifier value as the form identifier.
2. You've now established the unique identifier for the form and can begin mapping form inputs to ZoomInfo fields by copying inputs from the Inspector tool and pasting them in FormComplete. You can then map each input to a corresponding ZoomInfo field.

First, map the email field from your form to the ZoomInfo field for email by locating it in the Inspector tool and copy/pasting it in FormComplete. In this example, the email field value is email:



3. Paste the value (e.g., email) in FormComplete as an input, and map to the corresponding ZoomInfo email field.

Here's the result in FormComplete:



- Click **Add Field** to map each remaining Form Field to a corresponding ZoomInfo Field using the copy/paste method from the Inspect window.

Select the Form Identifier ⓘ

☒ <form>
☐ <div>

class ▼ wpcf7-form-init Apply

input	name	email
ZoomInfo Field	Email (*Required field) ▼	

input	name	fullName
ZoomInfo Field	Full Name ▼	

input	name	phone
ZoomInfo Field	Direct Phone Number ▼	

input	name	job
ZoomInfo Field	Job Title ▼	

- Optionally, if your form includes hidden fields, you capture additional information about the user from ZoomInfo. Map any desired hidden fields to corresponding ZoomInfo fields.

input	name	lastNameHidden
ZoomInfo Field	Last Name ▼	

+ Add Field

- Click **Next**.

Step 3: Advanced Settings

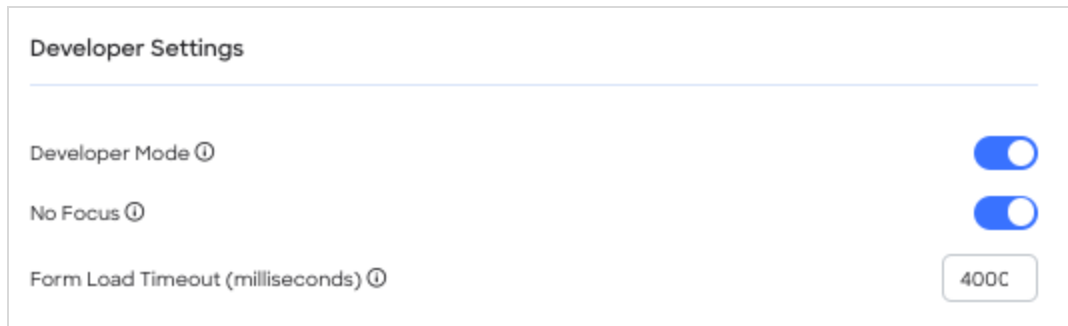
For details about each of the advanced settings, see [Advanced Settings and Options](#).

The screenshot shows the 'Advanced Settings (Optional)' configuration page. On the left is a vertical navigation menu with four steps: 'Enter URL' (checked), 'Map Form' (checked), 'Advanced Settings' (selected with a blue circle), and 'Install Script' (unselected). The main content area is titled 'Advanced Settings (Optional)' and contains several toggle switches and a text input field. The toggles are: 'Replicate across all webpages with same form ID' (off), 'Abandoned Form Tracking' (on), 'Form Shortening' (off), 'Match IP address for unmatched emails' (on), 'HubSpot iFrame Form' (off), and 'Domain Whitelisting' (off). Below the toggles is a text input field with the placeholder text 'Currently there are no whitelisted domains.' and a '+ Add New' link. Below this is a section titled 'Developer Settings' which contains three more settings: 'Developer Mode' (off), 'No Focus' (off), and 'Form Load Timeout (milliseconds)' (set to 400C). At the bottom of the page are three buttons: 'Cancel', 'Previous Step', and 'Next'.

1. Turn the toggles ON or OFF in the **Advanced Settings (Optional)** section.

This is a close-up view of the 'Advanced Settings (Optional)' section. It displays the following settings and their toggle states: 'Replicate across all webpages with same form ID' (off), 'Abandoned Form Tracking' (on), 'Form Shortening' (off), 'Match IP address for unmatched emails' (on), 'HubSpot iFrame Form' (off), and 'Domain Whitelisting' (off). Below these is a text input field with the placeholder text 'Currently there are no whitelisted domains.' and a '+ Add New' link.

2. In the **Developer Settings** section, you can choose some options to help facilitate better testing during implementation. See [Test and Enable FormComplete](#) for details.



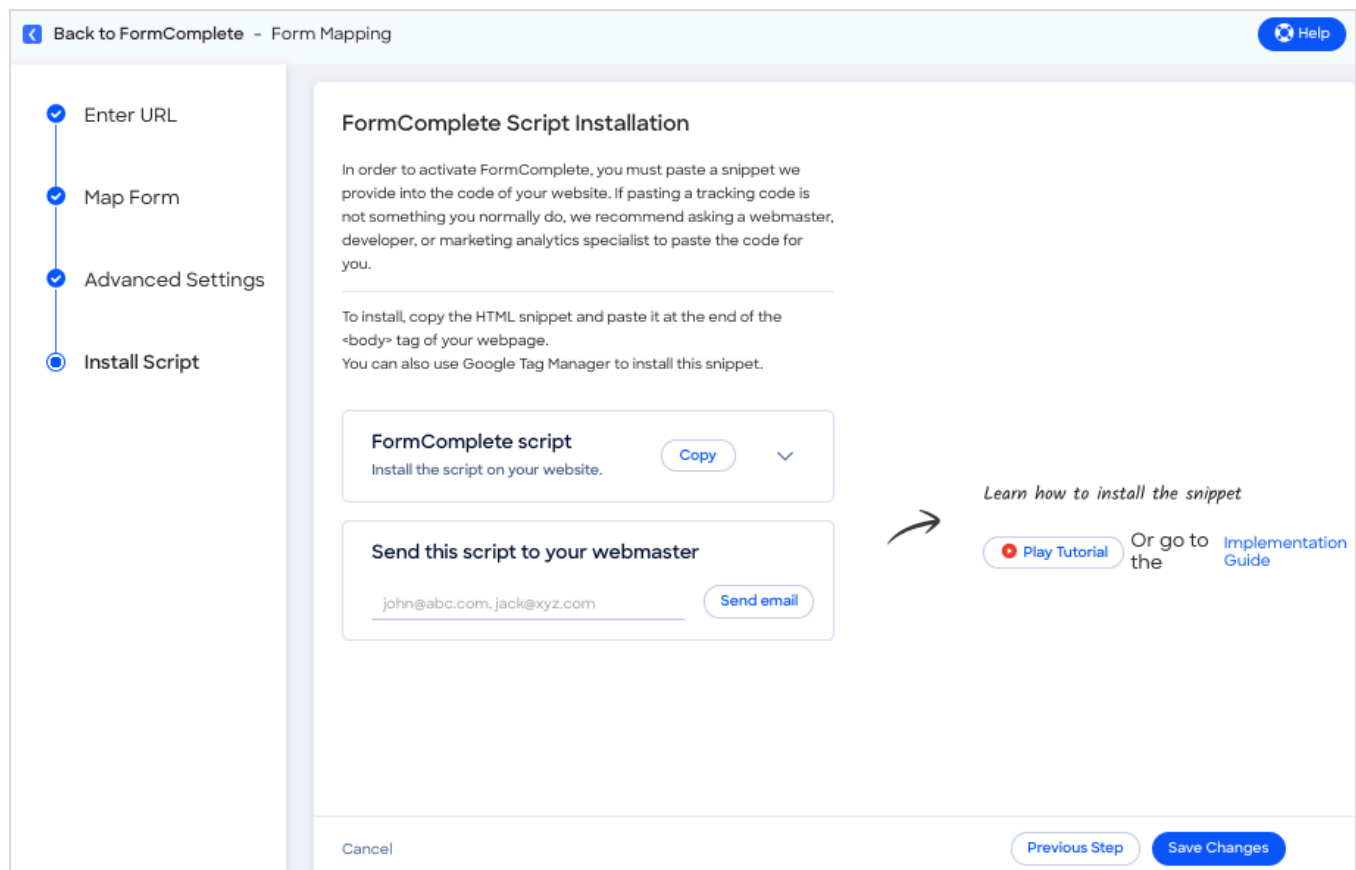
The Developer Settings panel contains three configuration options:

- Developer Mode**: A toggle switch that is currently turned on.
- No Focus**: A toggle switch that is currently turned on.
- Form Load Timeout (milliseconds)**: A text input field containing the value "4000".

3. Your next action depends on the following:
 - a. If this is your first form, click **Next** to go to the **Install Script** page.
 - b. If you've already installed the ZoomInfo Script on your website, click **Publish**.

Step 4: Install the ZoomInfo Script

Note: This step will only be presented if you're mapping your first form. This step *will not be presented* if you've already mapped your first form and successfully installed and verified the ZoomInfo Script on your website.



The FormComplete Script Installation page is divided into a left sidebar and a main content area.

Left Sidebar: A vertical list of steps with checkboxes. The steps are: "Enter URL", "Map Form", "Advanced Settings", and "Install Script". The "Install Script" step is currently selected and highlighted with a blue circle.

Main Content Area:

- FormComplete Script Installation**: The main heading.
- Instructions**: A paragraph explaining that a snippet must be pasted into the website code, and a recommendation to ask a webmaster, developer, or marketing analytics specialist for assistance.
- Installation Instructions**: A paragraph stating to copy the HTML snippet and paste it at the end of the <body> tag, and that Google Tag Manager can also be used.
- FormComplete script**: A box containing the text "Install the script on your website." and a "Copy" button.
- Send this script to your webmaster**: A box containing a text input field with the email address "john@abc.com, jack@xyz.com" and a "Send email" button.
- Learn how to install the snippet**: A section with a curved arrow pointing to a "Play Tutorial" button and a link to the "Implementation Guide".

Footer: A "Cancel" button on the left and "Previous Step" and "Save Changes" buttons on the right.

👉 See "Installing the ZoomInfo Script" in the [ZoomInfo Script Implementation Guide](#) for simple instructions on how to copy the script or send it to a webmaster to implement on your site.

Once you've installed the script, return to the [Test and Enable FormComplete](#) section in this guide to complete the implementation and learn more about getting value from FormComplete.

Test and Enable FormComplete

Once the ZoomInfo Script is installed for a domain, you can perform some testing in Developer Mode (recommended) and turn on FormComplete for a domain.

Perform Testing Using Developer Mode (Recommended)

This section describes recommended testing before turning on FormComplete for your form.

As an abuse prevention measure, FormComplete has a tight network security protocol that limits the number of requests to the application from a specific IP address. You can use [Developer Mode](#) to enable testing without hitting request limits.

If the Developer Mode toggle is set to ON in your form settings, your requests will never get blocked.

To simulate matching cases, you can use the predefined email addresses:

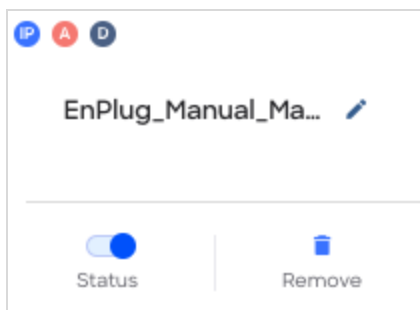
- no-match@zoominfo.com
- partial-match@zoominfo.com
- full-match@zoominfo.com

These email addresses will only work if Developer Mode is turned on. Once testing is complete, turn off Developer Mode.

Turn On FormComplete

Once the script is installed and tested, ensure that FormComplete is turned on for your form. To view FormComplete status:

1. Go to **FormComplete > Management**.
2. Find the tile for your form and ensure the **Status** toggle is set to ON.



Important: If you used Developer Mode to perform testing, set the **Developer Mode** toggle to OFF and ensure that the FormComplete **Status** toggle is set to ON as described above.

Important (Pardot forms only): Pardot forms are added in an iFrame and have no permission to access the form elements from the parent window. Developers must add the script inside the iFrame. See [Pardot Form Handling](#) for more details on installing the script in this scenario.

Map More Forms

When you're ready to map a new form, repeat the steps in this document to map the form, install the ZoomInfo Script (if not on the same domain), and ensure the configuration works as expected.

Best Practices for FormComplete

This section provides general best practices for configuring and using FormComplete.

Handling Form Submission Redirects

Some forms may experience submission tracking failures when websites redirect users immediately after form submission (e.g., to a "Thank You" page) or when leveraging custom validation or third party tools such as booking calendars. This can interrupt FormComplete's submission API call.

To ensure proper form submission tracking:

1. Allow sufficient time for FormComplete's API call to complete before redirecting users.
2. Implement the `fcTriggerSubmit` method when using custom form validation or third-party tools. See [FormComplete Javascript Methods](#) for details about the `fcTriggerSubmit` method.

Important notes:

- Custom form validation or third-party booking tools may interrupt FormComplete's submission tracking
- Review form validation logic for `preventDefault()` or `stopPropagation()` functions that could block FormComplete
- Ensure FormComplete's POST call completes before any page redirection occurs

This implementation ensures FormComplete accurately tracks form submissions while maintaining your desired user experience.

Security and Abuse Prevention

In order to prevent abuse, FormComplete has a tight network security protocol that limits the number of requests to the application from a specific IP address. Currently, FormComplete allows 5 requests per IP, per 10 minutes. If exceeded, the user will see *Error 429*, which is a rate-limiting error.

FormComplete sends the following three requests when a new user is filling a form that is powered by FormComplete:

- **getMapping:** This request is to get the form mapping so that we accurately return the data to form fields.
- **match:** This is a match request based on the user-entered email address.
- **getNeverBounce:** This request is to check the validity of the email address.

These three requests can also be found in the Network tab of the Inspector tool. If you are implementing and testing FormComplete, ensure you are using [Developer Mode](#) to avoid being blocked after 5 requests in less than 10 minutes.

FormComplete Javascript Methods

The following FormComplete JavaScript methods are available for developers to customize how FormComplete integrates with your forms. This section provides an overview of each method as well as an example.

fcRetrigger: This method will reinitialize FormComplete, allowing newly added forms on page to be attached to by FormComplete. This is usefully typically for popup forms.

fcTriggerSubmit: This method will tell FormComplete the form was successfully submitted. In most cases, this method is not necessary, however if form validation occurs on form submission, this may prevent FormComplete from observing the submission event. This method offers a way to programmatically tell FormComplete when a form has passed validation and has been submitted successfully.

fcUpdateElements: This method will populate form fields that were not present during the initial form enrichment. For multi-step forms, this method should typically be run each time the site visitor navigates forward and backwards in the form steps.

Callback Methods

FormComplete provides three callbacks that developers can use to develop custom logic based on what is being passed to, and returned from, FormComplete. The callbacks do not interfere with the default functionality of FormComplete. The callbacks are:

onReady: This callback will run when FormComplete has successfully attached to the form. It passes one parameter, an object with two members. The first has the key `formSelector` and the value is the identifier used to select the form that FormComplete is currently running on. The second object's key is `inputs`, and the value is an array containing identifiers for all mapped fields. Both the values of `formSelector`, and the members of the `inputs` array are strings.

onRequestSent: This callback will run when the match request is first sent, before any information has been returned from the server. It is passed one parameter - the email address that is being matched.

onMatch: This callback will run when the match request has returned information. It will be run whether or not there was a match in the ZoomInfo database. It is passed one parameter - a JSON object containing each of the mapped fields as keys and data that the server returned as the values. The `onMatch` callback has the `"this"` keyword scoped to include useful information such as the form selector and the form id.

Example

These methods must be implemented by a developer. Callback methods must be added to the **window._zi_fc** object (as shown in the example below). FormComplete will call these methods based on the actions outlined above.

```
<script>
/* Define FormComplete global variable. */
window._zi_fc = window._zi_fc || {};

/* fcRetrigger - Reinitialize FormComplete when CTA button clicked. */
document.getElementById("myExampleButton").addEventListener("click",
    function() {window._zi_fc.fcRetrigger();}
);

/* fcTriggerSubmit - Run this method on successful form submission.*/
window._zi_fc.fcTriggerSubmit();

/* fcUpdateElements - Run when button clicked. */
document.querySelector("button.next").addEventListener("click",
    function() {window._zi_fc.fcUpdateElements();}
);

/* onReady */
window._zi_fc.onReady = function(data) {
    console.log({data});
};

/* onRequestSent */
window._zi_fc.onRequestSent = function(data) {
    console.log({data});
};

/* onMatch */
window._zi_fc.onMatch = function(data) {
    console.log({data});
};
</script>
```

Pardot Form Handling

Pardot forms are added in an iFrame and cannot access the form elements from the parent window. Developers must add the script inside the iFrame.

If you are using FormComplete with ZoomInfo Marketing, you may have access to ZoomInfo Schedule. To make Schedule function properly, add the following line to the script in the iframe to enable the iframe script to communicate with the parent window script:

```
<script>
```

```
window.FCpostSubmissionEvent = true;

(script contents)

</script>
```

When a form submission is made, this function communicates to the script on the parent window to show Schedule's meeting type.

Email Validation Using ZoomInfo NeverBounce

We return the **data-zo-neverbounce-status** input attribute, which can be used to block the submit action on the form.

The **data-zo-neverbounce-status** can have the following possible values:

Field	Description	OK to Send?
valid	Verified as real email address	Yes
invalid	Verified as not valid	No
disposable	A temporary, disposable email address	No
catchall	A domain-wide setting	Maybe
unknown	The server cannot be reached	Maybe

Handling Forms Using FormComplete

Here are some relevant best practices for using HTML forms (source: w3schools.com).

Using the <form> Element

The HTML **<form>** element defines a form that is used to collect user input:

```
<form>
.
form elements
.
</form>
```

An HTML form contains form elements such as input elements, text fields, checkboxes, radio buttons, submit buttons, and more.

Using the <input> Element

The **<input>** element is the most important form element, and can be displayed in several ways, depending on the **type** attribute.

Here are some examples:

Type	Description
<code><input type="text"></code>	Defines a one-line text input field
<code><input type="radio"></code>	Defines a radio button
<code><input type="submit"></code>	Defines a submit button

Note: FormComplete fetches only the inputs that have a defined **<input name>** attribute.

Using Action Attribute for Submit Button

The submit value defines a button for submitting the form data to a form-handler.

```
<input type="submit">
```

The action attribute defines the action to be performed when the form is submitted.

```
<form action="/action_page.php">
  First name:<br>
  <input type="text" name="firstname" value="Jane"><br>
  Last name:<br>
  <input type="text" name="lastname" value="Smith"><br><br>
  <input type="submit" value="Submit">
</form>
```

Normally, the form data is sent to a web page on the server when the user clicks the submit button. In the example above, the form data is sent to a page on the server called **/action_page.php**.

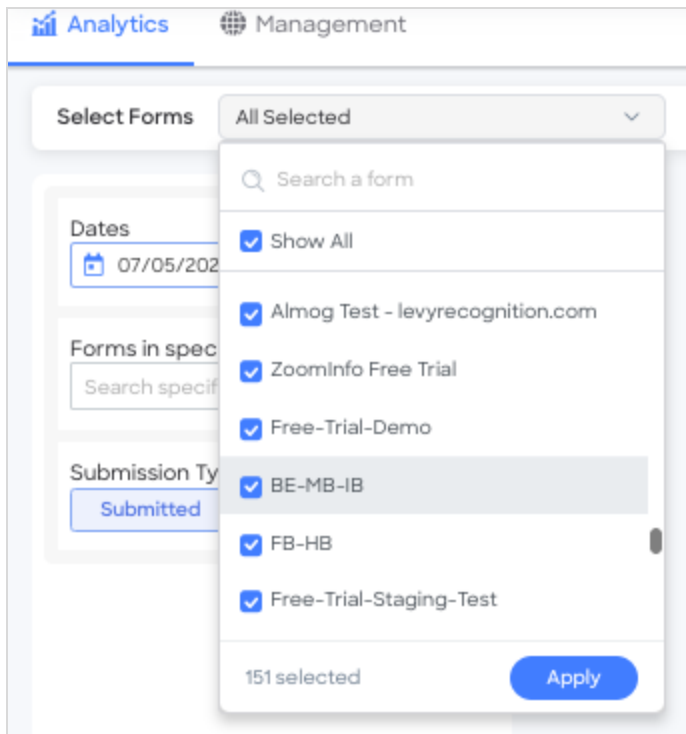
Enriching Canadian Province Information

American National Standards Institute (ANSI) is set as the default format for U.S. states used in FormComplete mapping. If you intend to also support Canadian provinces with your mapping, we recommend changing the default format to USPS. Using USPS as the default ensures that both U.S. states and Canadian provinces are seamlessly enriched.

Reviewing Form Analytics

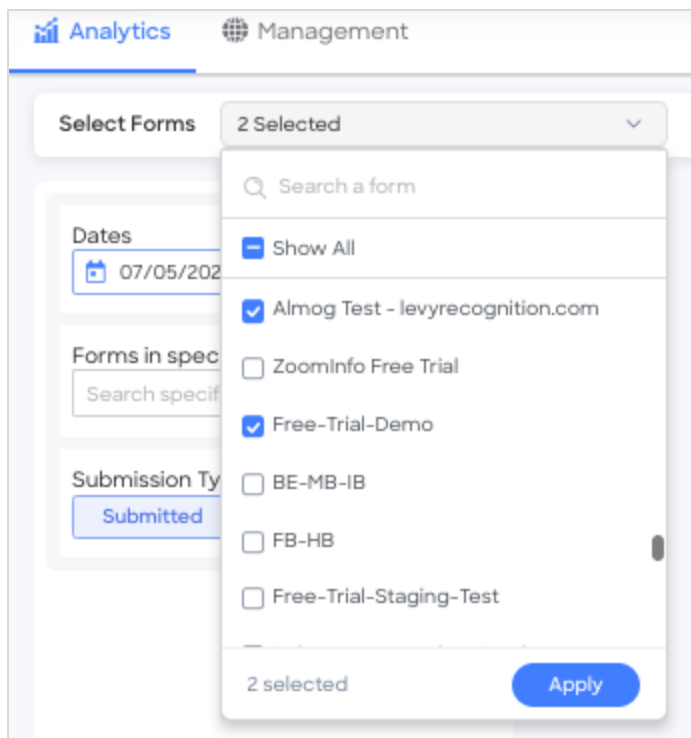
Navigate to **FormComplete > Analytics** for reports that provide details about your form activity and insights into the personas submitting the forms.

1. Click the **Select Forms** dropdown to view the list of forms managed by FormComplete.



By default, **Show All** is selected and data from all forms matching your current filter criteria are shown.

- To specify one or more individual forms, uncheck **Show All**. You can search for a form or scroll to select the forms you're interested in, and click **Apply**.



- Define the analytics you want to show.

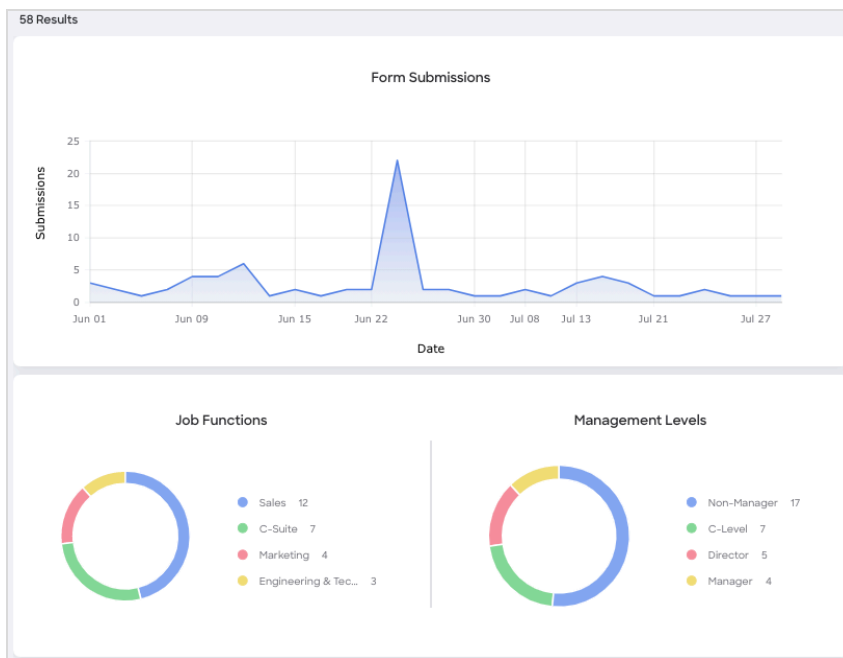
Dates
 -

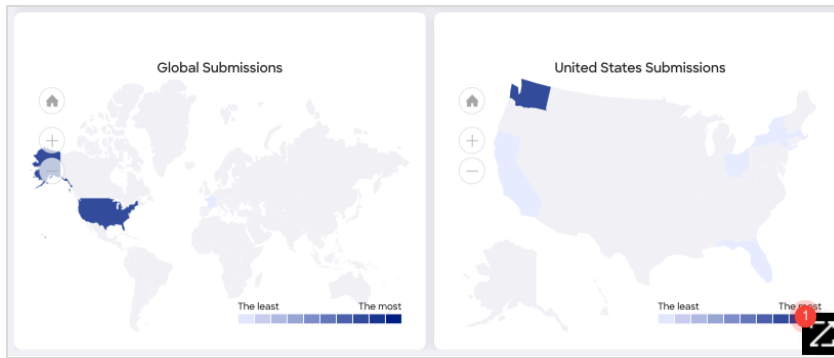
Forms in specific pages

Submission Types:

- **Dates:** Define a date range.
 - **Forms in specific pages:** Optionally, search for forms in specific pages.
 - **Submission Types:** If you've enabled Abandoned Form Tracking, you can choose to view data about **Submitted**, **Abandoned**, or **All** submission types.
4. From here, you can view the analytics data in graphical or tabular display and export the results by clicking **Export to CSV**.

The dashboard view provides a timeline of form submissions, as well as personas, facets, and geolocation information.





Click the **Display** toggle to show a tabular view which provides information about the required data fields along with any additional mapped fields that may be hidden from the user by default, but are enriched by ZoomInfo's data.

12 Results					
Date	Form Name	Contact Email	NeverBounce ⓘ	Submitted	Match Status
07/15/2021	Automation.dm6j	Automation.dm6j@Automati...	Invalid	✓	
07/13/2021	Automation.idgy	Automation.idgy@Automati...	Unknown	✓	
07/12/2021	Automation.a5t8	Automation.a5t8@Automati...	Unknown	✓	
07/09/2021	Automation-k7sm	autoformcomplete@zoomin...	Valid	✓	
07/09/2021	Automation-ef7c	autoformcomplete@zoomin...	Valid	✓	

Data Sharing

The Data Sharing page in the Admin Portal is enabled if your organization has not contractually opted out of data sharing with ZoomInfo that is intended to analyze your use of connected integrations. Data sharing helps to improve the ZoomInfo service and make recommendations to you.

1. Go to **Admin Portal > Privacy & Security > Data Sharing**.

- If your organization has chosen to opt-out of data sharing, the following message displays:

As a precaution, this function is set to OFF and is not editable, in order to prevent unintended changes that may be in conflict with your organization's contractual terms.

- If your organization has not opted out of data sharing, the **Data Sharing** page displays with the ON/OFF toggles enabled.
- ### 2. Data collection is subject to ZoomInfo's Privacy Policy. Review the policy details using the link provided.

3. Review and manage the data sharing settings according to your organization's data sharing preferences.
4. Over time, you can review the **Contributions** tab to monitor the contributions made by your organization.

Privacy Compliance

At ZoomInfo, we prioritize compliance with global data privacy laws to ensure that individuals interacting with our products have the necessary information to make informed decisions.

Before using FormComplete, please consult with your legal counsel to ensure you are providing appropriate disclosures and obtaining consent where required under laws applicable to your business. **ZoomInfo requires, at a minimum, that customers obtain consent from website visitors located in California and in the EU/UK in connection with their use of FormComplete.** Here are some suggestions to get you started:

- **Update Your Privacy Policy:** Let visitors know that by using and providing information to your website and filling out forms, they consent to the collection and use of that data by you and certain vendors to allow them to provide certain website functionality and to improve their products and services. Depending on whether you have enabled the Abandoned Forms feature, your disclosures may be slightly different. Here's some suggested language for each scenario that you can use as a starting point for your privacy policy:
 - **Abandoned Forms On:**
 - *When you visit, provide information, and fill out forms on our website (regardless of whether the form is ultimately submitted), we and our vendors collect and use such data for purposes including responding to your query, [insert other purposes that you may use form data for].*
 - **Abandoned Forms Off:**
 - *When you visit, provide information, and fill out forms on our website, we and our vendors collect and use such data for purposes including responding to your query, [insert other purposes that you may use form data for].*
- **Notice on Your Website Form:** We suggest adding a notice directly to your website forms that use FormComplete. Here's some suggested language, depending on whether you've enabled the Abandoned Forms feature:
 - **Abandoned Forms On:**
 - *By inputting data into this form, you consent to us collecting, using, and sharing such information with our vendors as described in our Privacy Policy.*
 - **Abandoned Forms Off:**
 - *By submitting this form, you consent to us collecting, using, and sharing that data you input into the form with our vendors as described in our Privacy Policy.*

The information and guidance provided in this Implementation Guide is for informational purposes only and shall not be considered legal advice of any kind. ZoomInfo is not qualified to provide legal advice and is not an authority on the interpretation of U.S. or international laws, rules, or regulations. To understand how specific laws may impact you or your business, you should seek independent advice of qualified legal counsel.