

Form design crib sheet

Feel free to modify & make your own. Add your branding, whatever you like.
Joe (aka @mrjoe)

cxpartners
research | design | strategy
info@cxpartners.co.uk
+44117 946 3930

This crib sheet brings together cxpartners' experience in designing forms that are easy to use and get users through the process as quickly and easily as possible.

Simple form field

Centre align all form fields. Use a different style of text for the label versus support text. The further help field sits on the right hand side of the input. The label should follow sentence case; that is Upper case first word, then lower case second word(s).

Field label ?
Support text

Select boxes where possible should default to a value. If this is not possible default to italic text, slightly grey in colour saying 'Please select...'

Field label ?

Place radio buttons underneath each other where possible. This allows for easy scanning:

Gender Male ?
 Female

Checkbox buttons take the same form. These can be listed in rows if needs be but only if there are more than five.

What are your favourite colours?
 Red
 Green
 Blue

Optionals fields

Users do not always understand the mandatory field marker (*) and on long pages the explanation can be lost. Where possible mark optional fields.

Field label
Optional

Support text

Support text should be used to give key information that is essential to complete the form field. Examples include password format and explanations for data collection.

National Insurance number
We need this to offer the tax savings on your ISA

Help text

Help text should be used to offer advice on a complex question. Where possible it should offer example answers and the format of that answer.

Field label ?
Support text

Help text should be activated by click and be a layer/lightbox next to the form field. Also if needed include links to contact form and the telephone number.

Date fields

For date of birth fields do not include a calendar look-up. Always use select boxes to minimise errors.

Date of birth

With standard date fields launch the calendar on focus on any of the form fields.

Date

Today
◀ December 2011 ▶
M T W T F S S
29 30 1 2 3 4 5
6 7 8 9 10 11 12
13 14 15 16 17 18 19
20 21 22 23 24 25 26
27 28 29 30 31 1 2

Adding select boxes for month and year aids look-up and a *Select today* link resets the calendar. Use a highlight colour to indicate Public Holidays if needed.

UK calendars begin on a Monday (many off-the-shelf JS calendars are American where calendars begin on a Sunday, the JQuery calendar offers it as a setting).

Some no-nos

- Do not place form fields side by side in columns. Users often do not see the form fields in the right column.
- Only use 1 field for telephone numbers (i.e. no area code box) as many users will try and put the full number in the area code box.
- Avoid long, complex, text based explanations at the top of forms - nobody ever reads them.

Buttons

Where possible there should be 2 kinds of button on the page.

- Support buttons such as postcode look-up, refresh, back etc.
- Primary button. There should be only one of these and it should be larger and with a different design. Primary button should include chevrons.

Having only 1 primary button clearly indicates to the user the most important action on the page. If more than 1 primary button is needed consider splitting form over 2 pages.

Description of next step

Where possible add a description to the primary button to indicate what the next screen will contain.

The final payment button should include a tick and some explanation text to give confidence to the user to click.

We will take £43.34 (saving £43.34) from your Visa card

Inline validation

Where possible all form fields should validate following cursor focus leaving that field.

1. Default state
Email ?

2. Completed successfully
Email ✓ ?

3. Completed unsuccessfully
Email ✗ ?
Please add an @ symbol

Where possible indicate why the form content is not correct. Do not use words such as error, problem or issue. Be positive.

4. Offering alternatives
Username ✗ ?
This username is taken
Consider:
 johnsmith23
 Jsmith
 Jsmith1982

Preselect the first option in the list.

Postcode look-up

Postcodes have on average 15 properties associated with them. Each of these properties may be broken up into flats. Therefore a large possible list of properties may result. Note positioning of button under the field - buttons to the right can easily be missed.

1. Default state
House name/number
Postcode

2. On click
House name/number
Postcode
 Looking up address

3. Results
House name/number
Postcode

Select address
Flat 1, 15 London Road
Flat 2, 15 London Road
Flat 3, 15 London Road
Flat 4, 15 London Road

If the user cannot see their address offer a link. On click this will display the manual address entry fields.

Layout and examples

Group related form fields together into smaller chunks. This makes the form feel easier to complete and less intimidating.

About you
Title
First name
Last name
Date of birth
Gender Male
 Female
Marital status
Optional

Contact details
Email address
Primary phone number ?
We won't pass this on to anyone else

Your address
House name/number
Postcode

To set up your direct debit

Page level error handling

There may be situations where errors can only be managed at the form submit level. Offer a direct link to each error (to a maximum of three). Clicking on the 'And 3 more' link will show the full list of hyperlinked errors. Linking to errors in this way offers greater accessibility to users of screen readers.

Please check the following:

- [Date of birth](#)
- [Marital status](#)
- [Email address](#)

[And 3 more...](#)

About you
Title
First name
Last name
Date of birth ✗
Please enter a day, month and year
Gender Male ✗
 Female
Please enter a gender
Marital status
Mobile phone number ?
We won't pass this on to anyone else

Contact details
Email ✗
Please add an @ symbol
Contact telephone number
We will only call about this account

Entering currency values

Users enter currencies and monetary values into forms in a number of different ways. Where possible the system should accept the following options:

Annual salary £
Annual salary £
Annual salary £
Annual salary £

Password strength

Where possible use plain text rather than images to aid accessibility:

Password Weak
8 to 20 characters. Upper & lower case & 1 or more number

Options for feedback on password strength:
✗ Weak OK Strong

Adding more than 1 email/phone

Many users, especially those under 25, may not have a landline number or indeed consider this their main phone number. Allow users to select which phone it is they want to offer as a primary number.

Primary phone

Email

For more form articles go to www.cxpartners.co.uk/blog

Joe Leech made this. Templates from www.cxpartners.co.uk/resources

This is [Creative Commons Attribution 3.0 Unported License](https://creativecommons.org/licenses/by/3.0/)

cxpartners
research | design | strategy
www.cxpartners.co.uk
+44117 946 3930

