

# Madhu Anbalagan's Blog

[Home](#) [Sitecore](#) [Presentations](#) [About](#)



[Home](#) [Sitecore](#) [Presentations](#) [About](#)



October 25, 2025



Optimizely

## Optimizely: Multi- Step Form Creation Through Submission

PREVIOUS STORY



[Optimizely Forms : Setup,  
Configuration and Submission](#)



**SITECORE**

TECHNOLOGY

**MVP**

2025



I have been exploring Optimizely Forms recently and created a multi-step Customer Support Request Form with File Upload Functionality.

Let's get started.

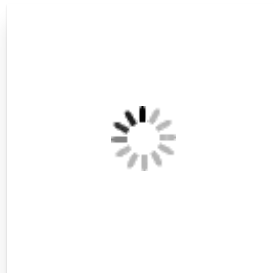
Note: Assuming that you have installed the Forms module. If not, please check out my blog post —

<https://madhuanbalagan.com/optimizely-forms-setup-configuration-and-submission>

## Creation of Multi-Step Form

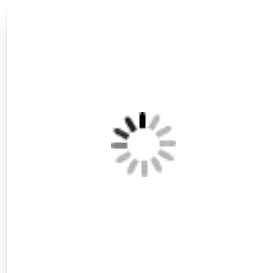


- Create a new Form Container in the Forms Tab – named it Customer Support Form.

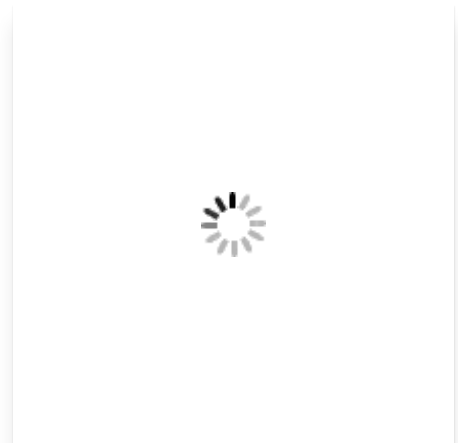
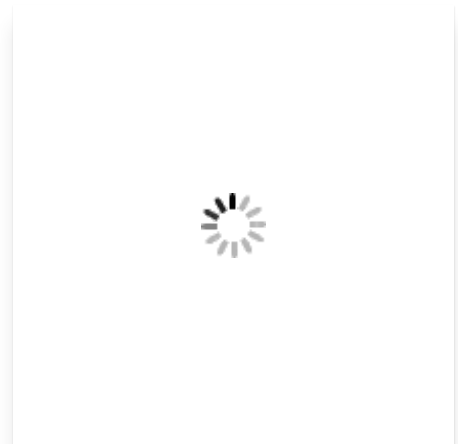
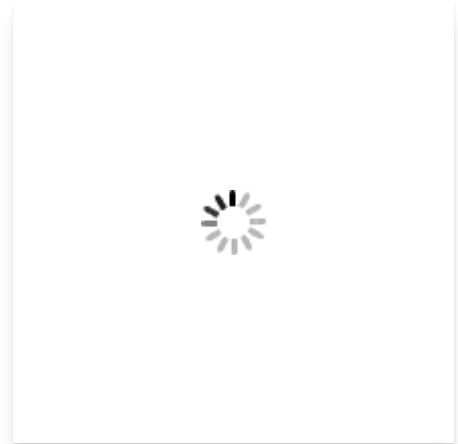


## Step 1: Contact Details

- Let's create the first step by dragging and dropping the Form Step in the Content Area.



- Quick Edit to fill the Title, Description,



### Recent Posts



- 🕒 Optimizely: Multi-Step Form Creation Through Submission
- 🕒 Optimizely Forms : Setup, Configuration and Submission

and publish the changes.



- Inside the Form Step 1 – Drag and drop the Text elements for the following fields.
  - Name
  - Email
  - Phone

**Note:** Publish each field to reflect on the Content Area.



## Step 2: Product Details

- Let's drag and drop the Form Step

🕒 Optimizely SaaS CMS Developer Certification

🕒 Optimizely : Fast Installation on Local Machine

🕒 Optimizely : Getting started

### Recent Posts



🕒 Optimizely: Multi-Step Form Creation Through Submission

🕒 Optimizely Forms : Setup, Configuration and Submission

🕒 Optimizely SaaS CMS Developer Certification

🕒 Optimizely : Fast Installation on Local Machine

🕒 Optimizely : Getting started

### Twitter Post



Tweets by madhumithaa

element like before, and the following fields.

- Product ID
- Purchase Date
- Warranty Status
- Product ID – Created as a Number and checked all validators.



- Purchase Date – Text field with Date Format validation.



- The Step 2 form is ready now.



## Step 3:

## Issue

## Description

## on

- Let's drag and drop the Form Step element like before, and the following fields.
  - Issue Type
  - Issue Description
  - File Upload
  - Submit button
- Issue Type – Selection element options entered manually – could be a datasource as well.



- File Upload – Set the Max Limit and Allowed extensions separated by a comma.

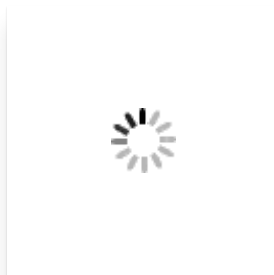


- The Step 3 part is completed and ready to be placed in a landing page.



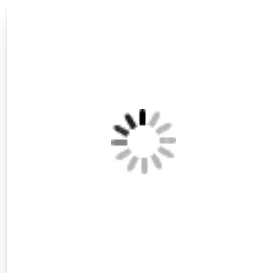
**Form in  
Landing  
Page:**

- Create a new Standard Page – Customer Support Page.
- Drag and drop the newly created Form into the Content Area.
- Publish the changes.



## Testing the Form:

- The new landing page shows in the menu – let's check it out.







- The File Upload – multiple file selection worked great!



- Let's submit the form – you could redirect to a specific page if needed.



## Form Submissions:

- The submitted records are

easy to check  
by pressing  
the Form  
Submissions.



- The records  
can be  
exported in  
any of the  
following  
formats.



- The records  
are stored  
forever by  
default – feel  
free to  
change the  
retention  
policy as  
needed for  
partial and  
full  
submissions.



If you prefer  
watching a video,  
my quick  
recording –



Hope this helps.

Happy  
Optimizing!

Tags: [EpiServer](#)

[EpiServer.Forms](#)

[forms](#) [Install](#)

[Multi-Step](#)

[MultiStep Forms](#)

[Optimizely](#)

[Optimizely Forms](#)

[Optimizely Multistep Forms](#)

## Leave a Reply

Comment \*

Name Email \*

\*

Website

☐

Notify me of  
follow-up  
comments by  
email.

☐

Notify me of  
new posts by  
email.

Post Comment



Madhu Anbalagan's Blog © 2025. All Rights Reserved.

Powered by WordPress. Theme by Alx.