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Optimizely

October 25, 2025

## Optimizely: Multi- Step Form Creatio n Throug h Submis sion

PREVIOUS STORY

Optimizely Forms : Setup,  
Configuration and Submission



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,



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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

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### 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

- 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!

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