Form design crib sheet

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).



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...'



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



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



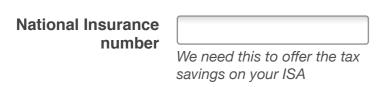
Optionals fields

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



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.



Help text

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



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.



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



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.

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

 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

- 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.



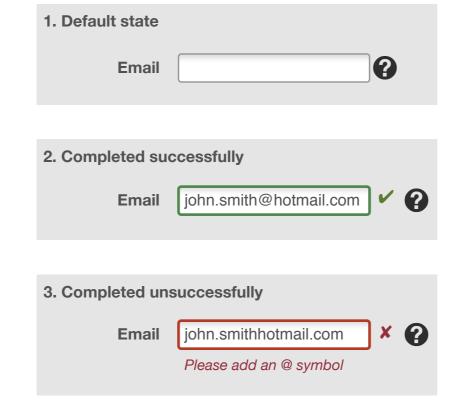
Where possible add a description to the primary button to indicate what the next screen will contain.

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



Inline validation

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



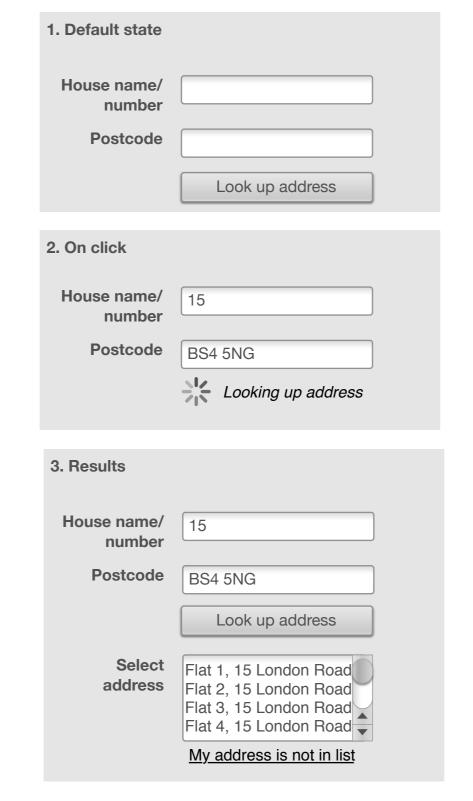
Where possible indicate why the form content is not correct. Do not use words such as error, problem or issue. Be positive.



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.



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

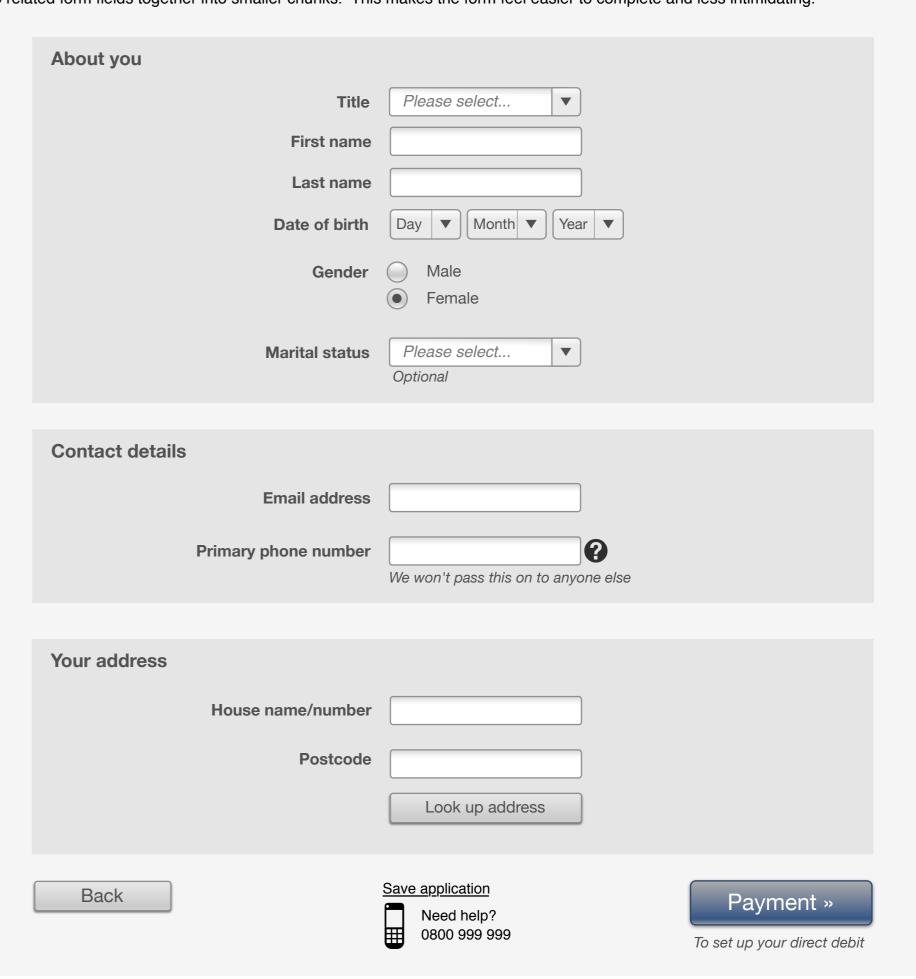
Feel free to modify & make your own. Add your branding, whatever you like.

Joe (aka @mrjoe)

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Layout and examples

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



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	Please select ▼
First name	
Last name	
⚠ Date of birth	Day ▼ Month ▼ Year ▼ X Please enter a day, month and year
Gender	Male X
	Female
	Please enter a gender
Marital status	Please select ▼
Mobile phone number	We won't pass this on to anyone else
Contact details	
Email	john.smithhotmail.com **Please add an @ symbol**
Contact telephone number	We will only call about this account
	in the start of th

ring currency values	Password strength
enter currencies and monetary values into forms in a r of different ways. Where possible the system should the following options:	Where possible use plain text rather than images to aid accessibility:

Annual salary £	18,000	Password		20 charac	cters. L	Ipper &	Weak
Annual salary £	18000			er case &			er
Annual salary £	18,000.00	Options for feedba	ns for feedback on password strength:				
Annual salary £	£18,000		X	Weak	OK	Stron	9

Adding more than 1 email/phone

Users (

numbe accept

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	Mobile ▼		Email Mobile ▼	
		[+] Add another telephone number		[+] Add another email address

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