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A collage of various user interface screens from different industries, including travel, budgeting, real estate, and medical services, illustrating complex forms.

Designing complex user forms: 12 UX best practices

Tips on how to make something complex look simple



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UX Collective a11y-light ~10 min read · May 26, 2020 (Updated: December 14, 2021) · Free: No

It's been a few years that I've been taking interest in designing complex user forms, where a lot of information is requested from users. Here are a few industries where you regularly find such flows:

- Real estate / Accommodation (e.g. publishing a listing on Airbnb)
- FinTech (e.g. sending money with TransferWise)
- LegalTech (claiming a compensation with AirHelp)
- InsurTech (e.g. getting a quote on Lemonade)

Designing such flows is tricky but important, because while asking a very extensive set of data to the user, the experience must look like it's effortless. Here are a few principles that are worth following in order to design the right flow:

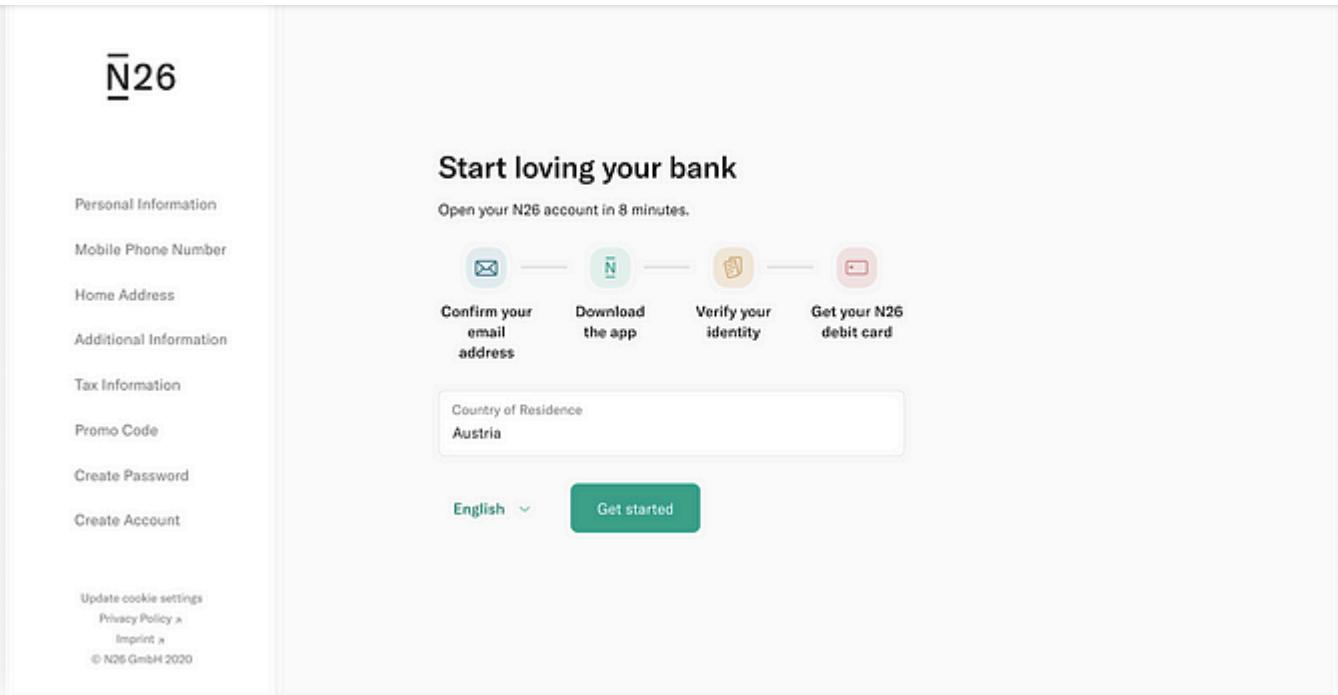
- 🚗 Reassure users on the duration of the flow
- 🍹 Make users feel like they're not working
- ✌️ Present all steps in a clear and understandable way
- 🤝 Explain why you're asking for each piece of information
- 🎯 Remove distractions
- 💾 Reassure users that their information can be saved
- ⚡ Show the real-time impact of the user's action
- 💡 Give some hints
- 🧑 Add some human touch
- 🚂 Bring in some credentials
- 🚅 Make it clear where users are and where they're going
- 📋 Enable users to review their information

Alright, let's deep dive into each of those principles!

🚗 Reassure users on the duration of the flow

Before they engage in a form, users must feel like this is going to be fast. One of the best examples is the online bank N26, who claims that opening an account with them only takes 8 minutes.

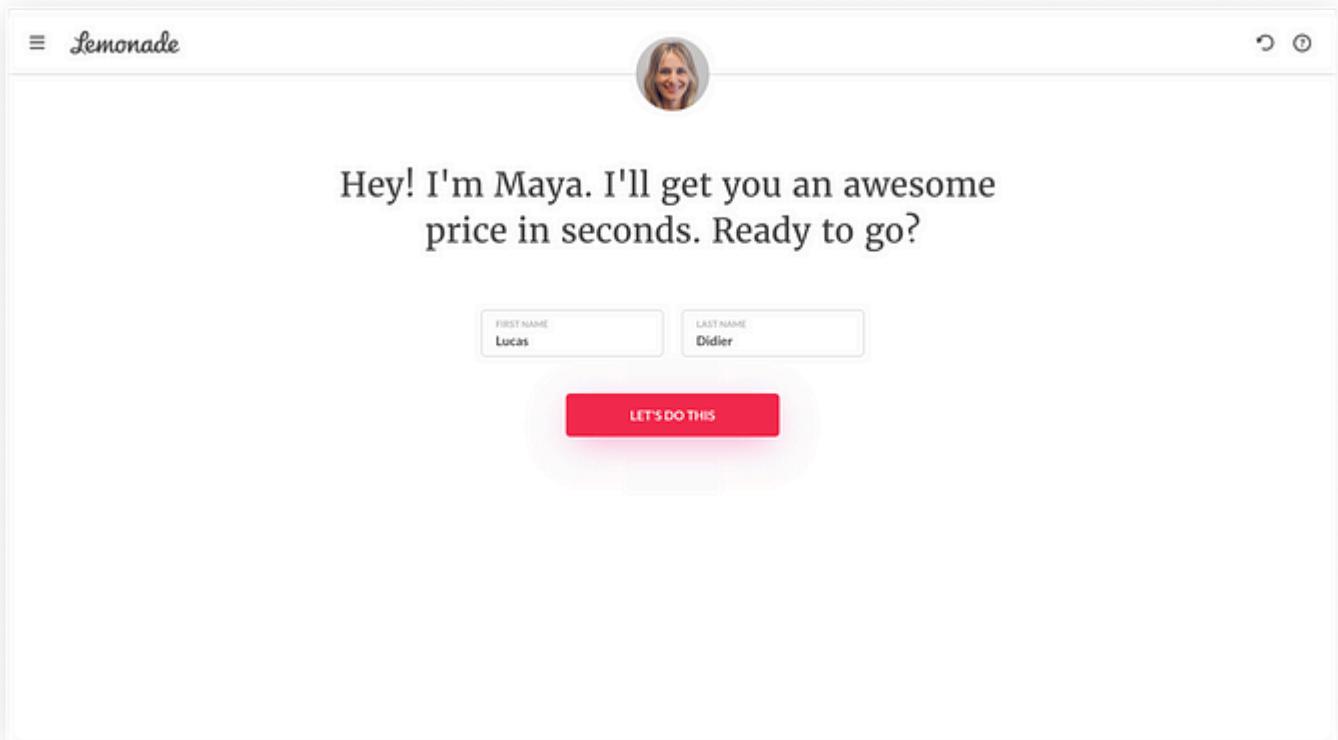
N26



The screenshot shows the N26 account opening process. On the left, a vertical sidebar lists steps: Personal Information, Mobile Phone Number, Home Address, Additional Information, Tax Information, Promo Code, Create Password, and Create Account. The 'Create Account' step is currently selected. At the top right, the title 'Start loving your bank' is followed by the subtext 'Open your N26 account in 8 minutes.' Below this are four circular icons representing the steps: 'Confirm your email address' (blue), 'Download the app' (green), 'Verify your identity' (orange), and 'Get your N26 debit card' (red). A dropdown menu shows 'Country of Residence' set to 'Austria'. At the bottom right is a green 'Get started' button. A language selector 'English' is at the bottom left. In the bottom right corner of the main area, there's a small footer with links: 'Update cookie settings', 'Privacy Policy', 'Imprint', and '© N26 GmbH 2020'.

Opening a bank account in 8 minutes? That sounds pretty futuristic, and yet it's true.

The same goes for Lemonade, an insurance startup, who promises you to get a quote **"in seconds"**:



The screenshot shows the Lemonade insurance quote request form. At the top left is the brand name 'Lemonade'. To the right is a circular profile picture of a woman named Maya. On the far right are two small icons. The main text reads: 'Hey! I'm Maya. I'll get you an awesome price in seconds. Ready to go?' Below this are two input fields: 'FIRST NAME' containing 'Lucas' and 'LAST NAME' containing 'Didier'. At the bottom center is a large red button with the text 'LET'S DO THIS'.

point is for you to "Compare insurance quotes instantly".

The screenshot shows the homepage of The Zebra insurance website. At the top, there's a navigation bar with links for 'Compare', 'Tools & Tips', 'Company', and a phone number '1.888.255.4364'. Below the navigation, the main headline reads 'Insurance in black & white.' with a registered trademark symbol. A sub-headline says 'Compare insurance quotes instantly.' There are two large buttons: one for 'Car insurance' (with a car icon) and one for 'Home insurance' (with a house icon). Between them is the word 'or'. Below these buttons is a form field containing 'ZIP code 94103' and a blue 'Start →' button. At the bottom of the form, there's a link 'Been here before? Review your quotes.'

How does The Zebra work?

💡 Make users feel like they're not working

This is probably the most critical part. Users are lazy and don't want to feel like you're asking them to work too hard. Hence a few ideas that you can apply to make them feel like you're doing the work for them:

- Offer them a list of pre-defined choices, instead of asking them to manually research what they're looking for

That's why offering a list of pre-defined choices, like Puls (an American home maintenance startup) does, makes it more likely that users are going to complete a complex form.

Solutions to all your home maintenance needs

Which service do you need?



[Home Appliances Repair →](#)



[TV Mounting →](#)



[Handyman Services →](#)



[Disinfection Services →](#)



[iPhone Repair →](#)



[Smart Home Installation →](#)



[Plumbing →](#)



[Garage Door →](#)

This follows a psychological principle, "*Recognition over Recall*" (source: [Mental Notes](#) card deck). This principle states the following: "*It's easier to recognize things we have previously experienced than it is to recall them from memory.*"

- Illustrate each choice to give more context about what you're asking

The Zebra's fire hydrant illustration is a good example. **Images and pictures speak louder than words.** With this illustration below, I immediately understand what is asked from me.

zebra

•
START
—
•
HOME
—
•
OWNER
—
•
RESULTS



Is there a fire hydrant within 1,000 ft of your home?

Think of it this way, is there a fire hydrant within 3 football field lengths of your home?

Yes

No

I'm not sure

It can also be illustrated in a fun/creative way, like Lemonade does with its toothbrushes to ask who's living in your home:

The screenshot shows a mobile application interface for the Lemonade brand. At the top, there is a navigation bar with a menu icon, the word "Lemonade", and three small circular icons. Below the navigation bar is a profile picture of a woman.

The main content area features a question: "Who else lives in your home?". Below the question are five options, each represented by a small icon of a toothbrush in a cup and a radio button:

- IT'S JUST ME (radio button is checked)
- MY PARTNER
- PARTNER AND KIDS
- MY KIDS
- OTHER

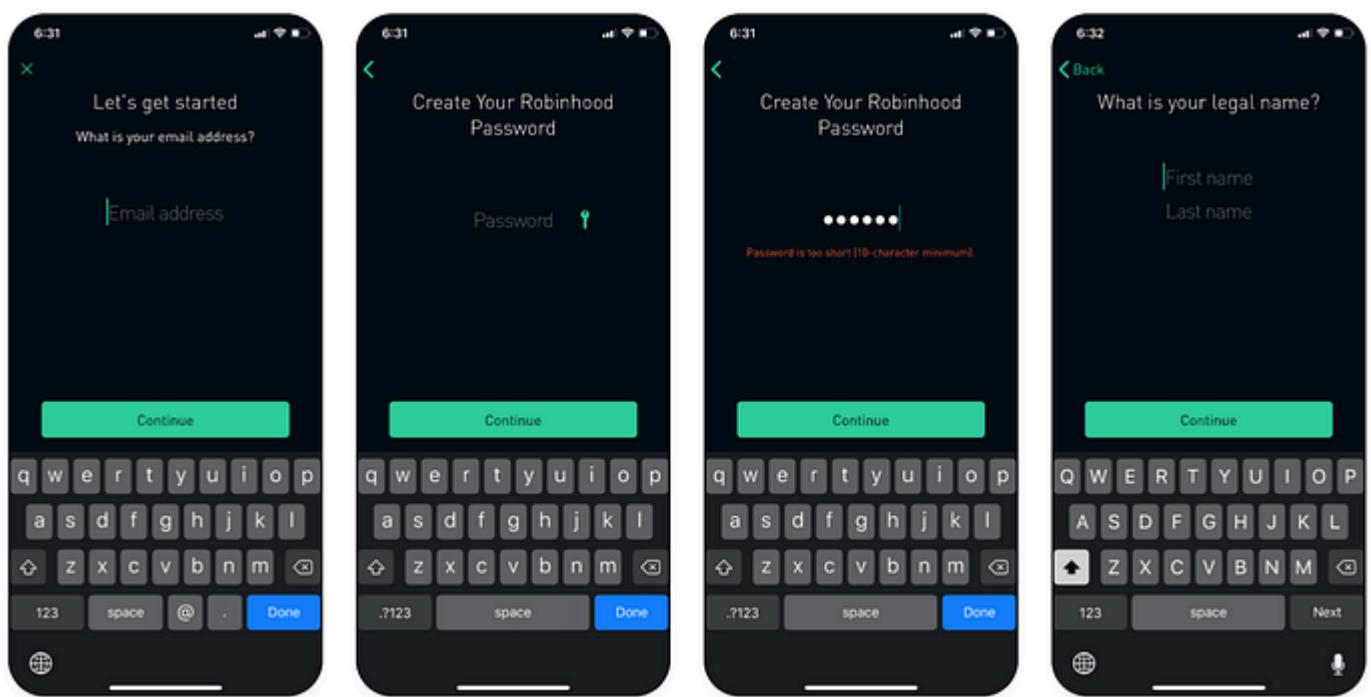
At the bottom center of the screen is a red "NEXT" button.

👌 Present all steps in a clear and understandable way

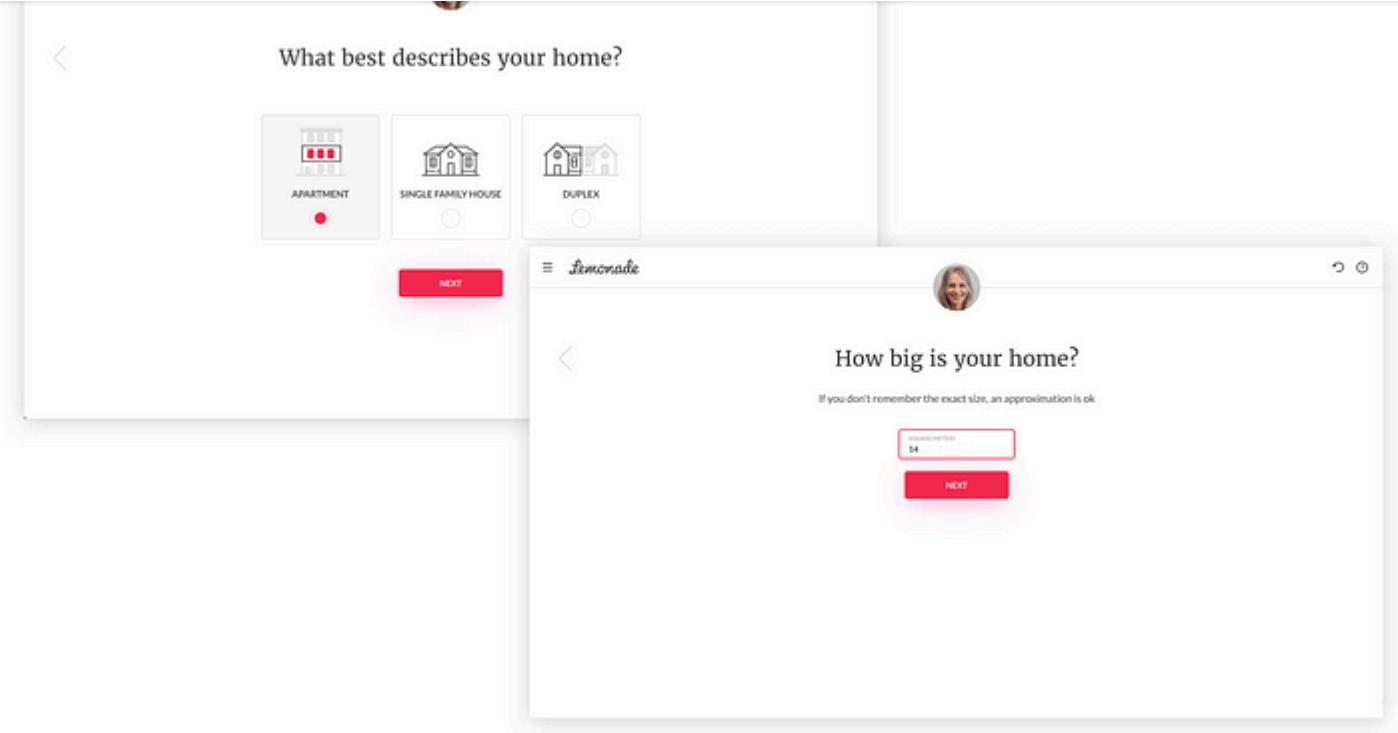
That's where "Sequencing", a psychological principle, comes into play: "*We are more likely to take action when complex activities are broken down into smaller tasks*" (source: [Mental Notes](#)).

Sequencing is applied on many digital products, by cutting down complex forms into smaller sub steps. It's what we also sometimes call a "One screen, one action" experience.

For instance, [Robinhood](#), the investment app, breaks down its sign up flow into 3 steps instead of one:



The same goes for Lemonade, which asks information about your home screen by screen, which makes the flow feel smoother and the user more serene.



This "one screen, one action" experience is now a common practice that has been widely adopted by lots of digital products.

🤝 Explain why you're asking for each piece of information

Since the Cambridge Analytica case and a few other user data breaches (Adobe, LinkedIn, Canva, eBay, etc.), users don't give away all their data as easily as before. You have to be transparent why and how you will be using their personal information.

It's good to give some reassurance about data privacy, like The Zebra does ("We take your privacy seriously and your information is always secure with us").

It's even better to explain why each piece of information is required...

- ...When you ask for personal information

The best example I've found to date is N26's sign up flow from 2018. In this flow, each and every piece of personal information was justified with a very convincing description.

- ...When you ask for information that's tricky to get

can get quickly discouraged by such questions.

The screenshot shows the Zebra insurance website. On the left, there's a vertical navigation bar with 'START' at the top, followed by 'HOME', 'OWNER', and 'RESULTS'. A blue house icon with a dollar sign is next to 'HOME'. The main content area has a title 'How much would it cost to rebuild your home?' with a sub-note 'Insurance companies use this amount to set your rate, not your home's market value.' Below this is a form field labeled 'Rebuild cost:' with '\$' typed in. To the right, under 'Property', it says 'Primary Home' with details: 621 Fillmore Street, Single family home, 156 – Square footage, 2 stories, Slab – Foundation type, Wood frame – Construction type, Wood – Roof type, 1983 – Year built. At the bottom, there's a section 'Is your home in a flood zone?' with a small house icon, a note to use the FEMA flood map service center, and two radio buttons for 'Yes' and 'No'.

Luko, a French insurtech startup, justifies asking detailed information about your home in order because they want to "offer you the best rates".

The screenshot shows the Luko insurance website. At the top, there's a back button, the Luko logo, and a Log in link. Below this, a user profile 'Emma' is shown with a note: 'In order to offer you the best rates, we need some information about your home:'. A map of a city area is displayed with a blue pin indicating the location. Below the map, there's a form field for 'Total living space in m²' containing '0'. Underneath, there are dropdown menus for 'Floor' (labeled 'Select which floor') and 'Number of rooms' (labeled '0'). At the bottom, another user profile 'Emma' provides a note: 'The number of rooms includes rooms, such as bedrooms, living rooms or dining rooms. Kitchens, bathrooms, and closets are not included in the number of rooms.' A 'next' button is at the bottom left, and a blue circular icon with a white speechmark is at the bottom right.

📍 Remove distractions

In a complex user form, it's important to provide a clean interface where users aren't distracted too much by banners and navigation links.

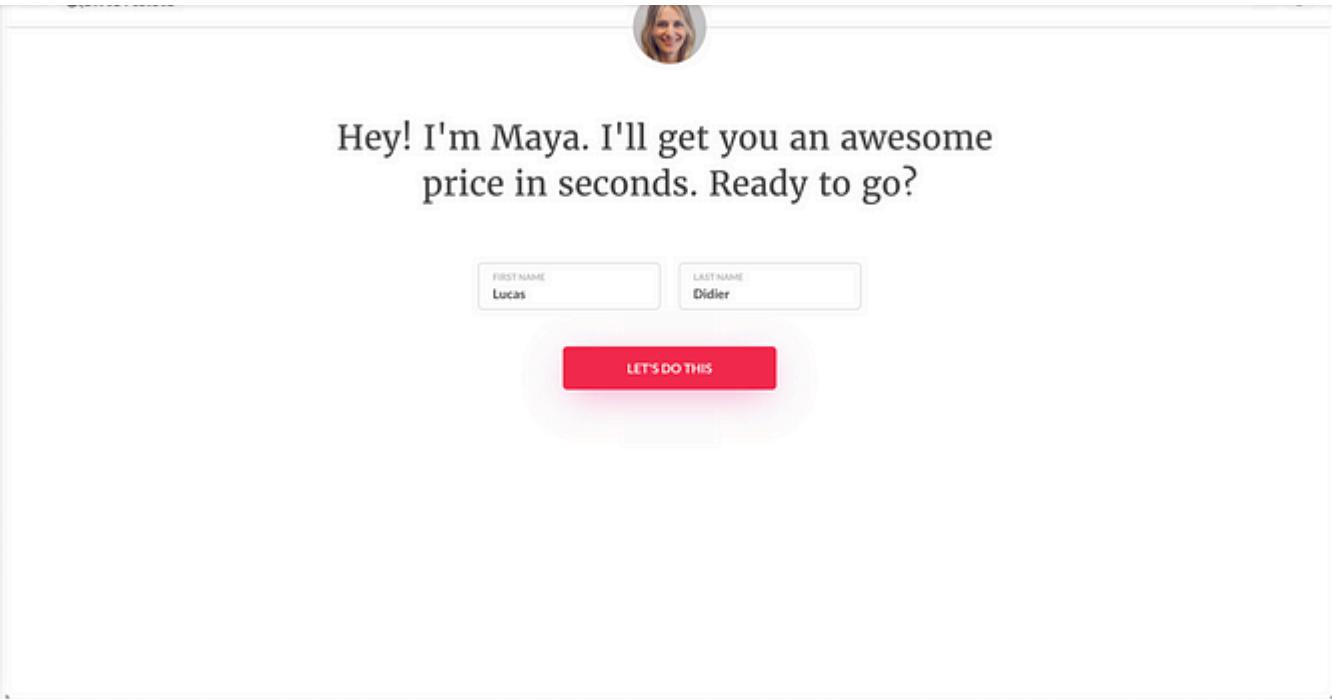
For instance, in the Airbnb publication flow, the only link you'll find is "Save and Exit". There is no possibility to access your user profile or make a search. This maximizes the chances that users will stay focused and complete the funnel.

The screenshot shows a step in the Airbnb listing creation process titled "Step 1: Start with the basics". At the top right, there is a "Save and Exit" button with a note "Saved a few seconds ago". The main content area is titled "What amenities do you offer?" and includes a sub-note: "These are just the amenities guests usually expect, but you can add even more after you publish." Below this, there is a list of amenities with checkboxes:

- Essentials
Towels, bed sheets, soap, toilet paper and pillows
- Wi-Fi
- TV
- Heat
- Air conditioning
- Iron
- Shampoo
- Hair dryer
- Breakfast, coffee, tea

At the bottom left is a "Back" button, and at the bottom right is a "Next" button.

Lemonade went for a compromise: they're still giving users the possibility to access navigation links, but those are hidden behind a hamburger menu in the top left section of the screen.



Reassure users that their information can be saved

Complex user forms can sometimes require users to complete them over the course of several sessions. Indeed, they can require some information, documents or pictures that users can't immediately access.

That's why it's important to make it clear that all the efforts that users have made so far aren't in vain. That all their information has been saved or can be saved easily.

Publishing a listing on Airbnb can take some time, because you need to upload the right pictures. That's why the interface lets its users know that their progress has been automatically saved, and also displays a link that enables them to "Save and Exit".

What amenities do you offer?
These are just the amenities guests usually expect, but you can add even more after you publish.

Essentials
Towels, bed sheets, soap, toilet paper and pillows

Wi-Fi

TV

Heat

Air conditioning

Iron

Shampoo

Hair dryer

Breakfast, coffee, tea

[Back](#) [Next](#)

⚡ Show the real-time impact of the user's action

In forms where user actions have an impact on a major piece of information (e.g. price), showing the real-time impact adds a lot of serenity.

For instance, when you're booking a flight on Transavia, a European low-cost airlines, any extra service you're opting for is immediately shown in the sticky footer. You see a new icon for the extra service you've selected, but you also see the price being instantly updated.

I want Fast Track security (available from Paris (Orly 3)) for € 7

Want to be on the safe side?

Yes, I can change all passenger information for € 2 up to 48 hours after making my booking.

Need medical services?

Yes, I will inform you of the medical services I require on the next page

Paris (Orly 3) → Agadir 16 July 2020 Details ▾ Total amount **€ 279.00**

Next →

Return

Same idea in the B2B space. When you upgrade your FullStory account, there's a fixed block dedicated to the details of your offer on the right side of the screen. This shows the content of your offer as well as the monthly price instantly updated when you make changes in the left part of the screen.

1 What are your monthly traffic needs?

100K sessions

How long do you need your data stored?

Choose what will accommodate your company's data retention needs.

- 6mo +

fullstory PRO

SUMMARY
100K sessions / 6mo history

Session and data retention needs can be adjusted at any time. And as with any plan change, your bill will reflect a pro-rated amount.

FEATURE PACKS
Choose Feature Packs...

\$633

per month billed annually or \$949 month-to-month

Not ready to go Pro? Try FullStory Free

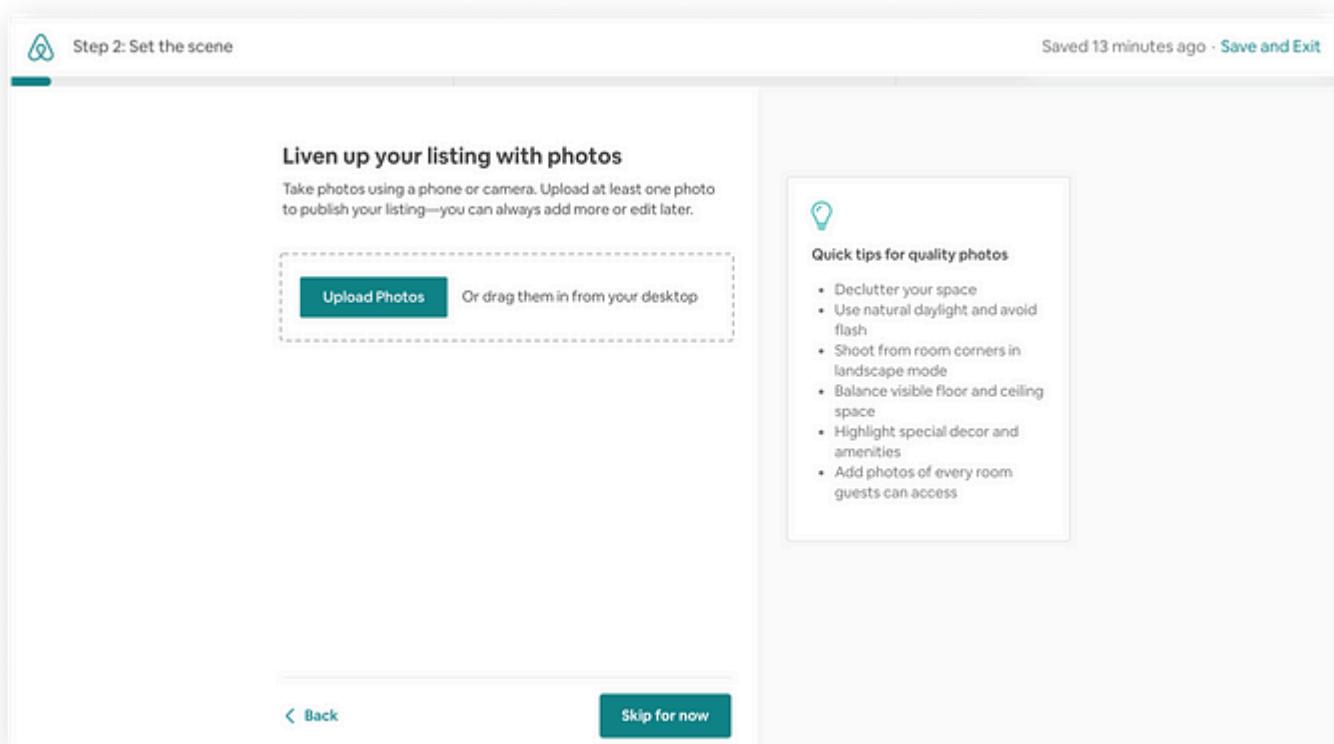
Chat

This sort of "real-time update" experience adds a lot of transparency to the pricing of a service.

💡 Give some hints

When a flow requires very specific information where users can easily get mistaken, it's relevant to add some hints.

Photos are the most important asset of an Airbnb listing. If you upload ugly photos, chances are very limited that you will be able to host guests. That's why Airbnb gives some hints on its right side panel on how to take quality photos.



But hints can also be **inspirations from other users**. When you start creating an experience on Airbnb, they display similar experiences on the right side panel, which enables you to benchmark other experiences in order to find inspiration in terms of name, branding, photos, description, price, etc.

Submit your experience

- Your idea
- Location
- Your theme**
- What we're looking for
- Basic information
- Experience page
- Settings
- Your submission

What type of experience will you host?

Select a theme that best describes what guests will mainly be doing on your experience. This will help guests find and book your experience.

Choreography class
Entertainment - Dance - Choreography

How about another theme? (optional)

The most unique experiences have more than one theme. Capture different aspects of your experience by including more.

+ Add a secondary theme

Back

23 items to submit

Similar experiences guests love

- 
UNITED STATES ★ 5 (96)
New Orleans Bounce and Twerk with MoeJoe
 From €79/person
- 
SOUTH KOREA ★ 5 (21)
Dance like a K-pop star for Beginners
 From €20/person
- 
UNITED KINGDOM
Adapted Dance Class
 From €14/person
- 
BRAZIL ★ 5 (250)
samba class in Ipanema
 From €21/person
- 
SWITZERLAND
La Téhima, Méditation en

The same goes for pricing. When you post an offer for a project on Upwork, they show you a range of hourly rates for similar projects. This enables you to increase chances that you'll find a relevant freelancer for your job.

Title
 Description
 Details
 Expertise
 Visibility
\$ Budget
 Review

Budget

Step 6 of 7

How would you like to pay your freelancer or agency? ?

POPULAR


Pay by the hour
Popular for ongoing projects

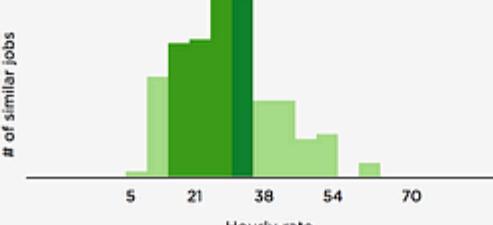


Pay a fixed price
Popular for one-time projects

Set your estimated budget

Choose the typical hourly range

The typical hourly rate \$30-\$35/hr -\$33/hr for jobs like yours



Hourly Rate Range	# of Similar Jobs
5 - 10	Very Low
11 - 15	Low
16 - 20	Medium-Low
21 - 25	Medium-High
26 - 30	High
31 - 35	Very High
36 - 40	Medium-High
41 - 45	Medium-Low
46 - 50	Low
51 - 55	Very Low
56 - 60	Medium-Low
61 - 65	Low
66 - 70	Very Low

Add some human touch

In verticals where users are usually cautious (e.g. insurance or legal expertise), adding a human presence in the flow can feel reassuring. It looks like there's someone personally taking care of your case, even though it's just a computer-generated form.

luko

Emma
Looks great! Is it a house or an apartment?



A house



An apartment

next

≡ Lemonade

Hey! I'm Maya. I'll get you an awesome price in seconds. Ready to go?

STREET AND CITY

HOUSE ZIP

NEXT

AirHelp

Claims & Flights Check Flight Help

Test Test

1 ELIGIBILITY CHECK
2 ADDITIONAL INFORMATION
3 DOCUMENTS
4 FINISH

AirHelp enforces EU regulation EC261

Jane
Your AirHelp Assistant

Hi! Let's check if your flight is eligible for compensation.
Where did you fly to?

DEPARTED FROM FINAL DESTINATION

e.g. New York or JFK e.g. London or LHR

"Since it launched, AirHelp has been doing the dirty work on behalf of its customers, and it's not afraid to take airlines to court."

community is giving some tips on how to best fill in the required information.

The screenshot shows a user profile creation interface. At the top, it says "creme de la creme". Below that, there's a section titled "Your professions" with the sub-instruction "Tell us about your main profession and the associated secondary ones." A "Main profession" dropdown is set to "Agile Coach" and a "Proficiency" dropdown is set to "5-10 years". A "Select skills/technologies" input field contains "Active campaign CRM" with a proficiency level of 3. A "Next" button is at the bottom.

Choose your main profession, the one which better describes your professional activity.
From then, you can pick up to 2 secondary professions and your associated skill level.
If some of your skills do not appear in the drop-down list, feel free to tell us!

👮 Bring in some credentials

In verticals depending on an official regulation, it's important to show that you have the appropriate credentials. That's why AirHelp shows an informational banner proving that it's enforcing the "EU regulation EC261". This plays on authority — thanks to this, users are better convinced of AirHelp's legitimacy regarding flight compensations.

The screenshot shows a user interface for AirHelp. On the left, there's a vertical navigation bar with four steps: 1. ELIGIBILITY CHECK, 2. ADDITIONAL INFORMATION, 3. DOCUMENTS, and 4. FINISH!. Below this is a testimonial: "Since it launched, AirHelp has been doing the dirty work on behalf of its customers, and it's not afraid to take airlines to court." To the right of the navigation is a sidebar with the AirHelp logo and a message from "Jane, Your AirHelp Assistant". The main area starts with a heading "AirHelp enforces EU regulation EC261". It features a progress bar at the top with the text "Hi! Let's check if your flight is eligible for compensation. Where did you fly to?". Below this are two input fields: "DEPARTED FROM" (e.g. New York or JFK) and "FINAL DESTINATION" (e.g. London or LHR). A section asks "Did you have any connecting flights?" with radio buttons for "Yes" and "No" (the "No" option is selected). A note below says "No risk. Submitting a claim is absolutely free of charge." At the bottom is a green "Continue →" button. On the far left, there are security badges for Norton Secured and Trustpilot.

In highly competitive verticals, credentials can also be emphasized with **social proof**. Using customer testimonials and third-party ratings, this reinforces AirHelp's legitimacy.

Make it clear where users are and where they're going

In a long user form with many steps, it's important to give users some peace of mind by clearly showing their progress. This can be done through 3 interface elements:

- Showing a progress bar

This is the most frequently used UI component to show progress. It works easily both on desktop and mobile.

Freedium

<p>When were you born, Lucas ? So that we'll never forget your birthday.</p> <p>DD MM YYYY</p> <p>Continue</p>	<p>What's your phone number? We'll need it later to securely pair your smartphone to your account.</p> <p>+33</p> <p>Continue</p>	<p>What's your gender? This will help us to address you correctly in some languages.</p> <p><input checked="" type="checkbox"/> Male</p> <p>Female</p> <p>Continue</p>	<p>In which country are you tax liable?</p> <p>This information is required by the tax authorities and will be required within the first 90 days of account creation. Am I liable to pay taxes in the United States?</p> <p>France</p> <p>Tax ID (optional)</p> <p>+ Add another</p> <p>Skip</p>
--	---	--	--

- Showing the main steps of the flow

This can be either displayed horizontally, through breadcrumbs, like on TransferWise's money transfer flow...

TransferWise

Amount You Recipient Review Pay

Who is sending the money?

 LUCAS DIDIER Personal profile	 Business Business profile	 On behalf of someone else Not allowed
---	---	--

... Or vertically, through a side panel, like on Airbnb's experience publication flow:

Submit your experience

- Your idea
- Location
- Your theme**
- What we're looking for
- Basic information
- Experience page
- Settings
- Your submission

What type of experience will you host?

Select a theme that best describes what guests will mainly be doing on your experience. This will help guests find and book your experience.

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Entertainment - Dance - Choreography

How about another theme? (optional)

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Dance like a K-pop star for Beginners
 From €20/person
- 
UNITED KINGDOM
Adapted Dance Class
 From €14/person
- 
BRAZIL ★ 5 (250)
samba class in Ipanema
 From €21/person
- 
SWITZERLAND
La Téhima, Méditation en

• Using "checkpoints" screens

A "checkpoint" screen is a screen that you see after completing each step of a flow. If you have a flow that can take several user sessions to complete, it can be relevant to implement such an interface. That's what Airbnb does in its publication flow.

Great progress, Lucas!

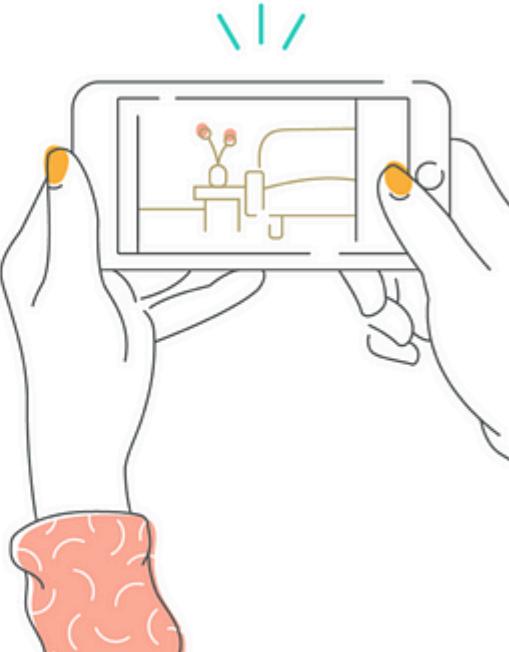
Now let's get some details about your place so you can publish your listing.

Beds, bathrooms, amenities, and more [Change](#)

STEP 2
Set the scene
Photos, short description, title

Continue

STEP 3
Get ready for guests
Booking settings, calendar, price

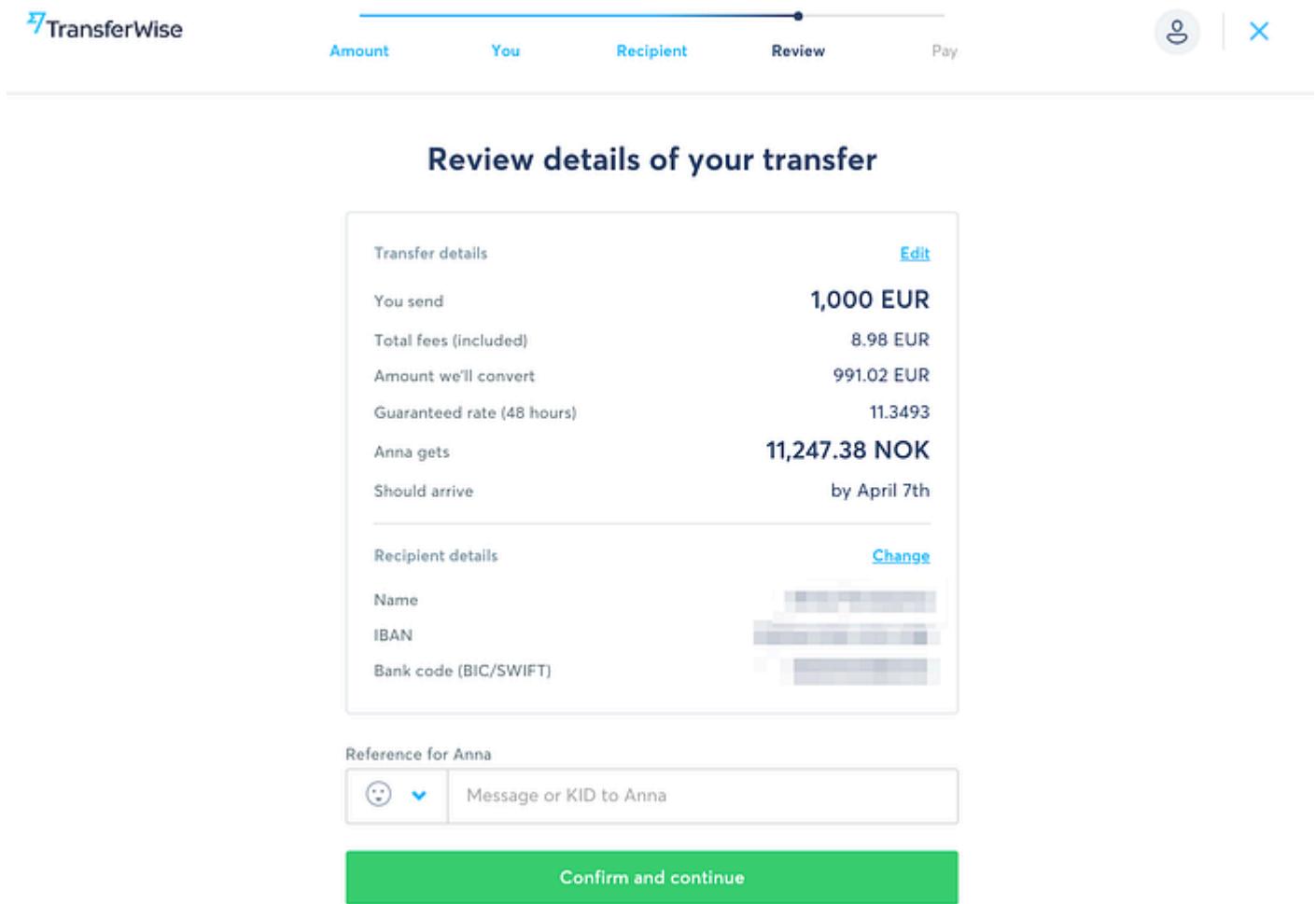


 **Enable users to review their information**

In flows where the last step includes a very committing action (e.g. transferring money or making a payment), users can easily drop off if they're not sure that all of their information is correct.

That's why you need to provide them with an easy way to review all of the information they've completed throughout the flow, as well as a way to easily edit any piece of information that might be incorrect.

A good example is TransferWise's "Review" page, just before sending a money transfer.



The screenshot shows the TransferWise "Review" page for a money transfer. At the top, there's a navigation bar with steps: Amount, You, Recipient, **Review**, and Pay. To the right are user profile and X icons. Below the navigation is the title "Review details of your transfer".

Transfer details		Edit
You send	1,000 EUR	
Total fees (included)	8.98 EUR	
Amount we'll convert	991.02 EUR	
Guaranteed rate (48 hours)	11.3493	
Anna gets	11,247.38 NOK	
Should arrive	by April 7th	

Recipient details		Change
Name	[REDACTED]	
IBAN	[REDACTED]	
Bank code (BIC/SWIFT)	[REDACTED]	

Reference for Anna

😊

Message or KID to Anna

Confirm and continue

That's it for this post. I hope you enjoyed those best practices! Feel free to share some of your own examples of how to make complex user forms look simpler.

Need product/UX consulting on your own product? Check out my services! 👉

<http://www.lucasdidier.com>

#ux

#design

#ui

#product-design

#startup