

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).

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 labelPlease select...

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 is 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

Day

Month

Year

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

Date

Day

Month

Year

Today

[X]Close

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December 2011

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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.

Back

Next »

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.

✓ Buy Now

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

4. Offering alternatives

Username

This username is taken

Consider:

☒ johnsmith23

☐ Jsmith

☐ Jsmith1982

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

Look up address

2. On click

House name/number

Postcode

Looking up address

3. Results

House name/number

Postcode

Look up address

Select address

Flat 1, 15 London Road

Flat 2, 15 London Road

Flat 3, 15 London Road

Flat 4, 15 London Road

My address is not in list

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

TitlePlease select...

First name

Last name

Date of birth

Day

Month

Year

Gender

☐ Male

☒ Female

Marital statusPlease select...

Optional

Contact details

Email address

Primary phone number

We won't pass this on to anyone else

Your address

House name/number

Postcode

Look up address

Back

Save application

Need help?

0800 999 999

Payment »

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

TitlePlease select...

First name

Last name

Date of birth

Day

Month

Year

Please enter a day, month and year

Gender

☐ Male

☒ Female

Please enter a gender

Marital statusPlease select...

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 £

18,000

Annual salary £

18000

Annual salary £

18,000.00

Annual salary £

£18,000

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

Mobile

[+] Add another telephone number

Email

Mobile

[+] Add another email address

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

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

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