PipelineSync

FREE TEMPLATE · FORMS

HubSpot Form Field Plan

Plan every form before you build it: what it is for, which fields write to which properties, how consent, spam and follow-up work, and how it converts each month. Reference pages, a worked example and fillable worksheets.

Form inventory | Field plan | Launch checklist | Monthly review

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Fillable PDF · pipelinesync.net/resources

START HERE

How to use this template

A form is a data contract. Most form problems are decided before you build it: which property each field writes to, where spam is caught and who follows up. This template makes you write those decisions down and keeps them as the record of what is live.

1 Check your plan
Confirm the features you need are in your subscription and choose the editor (pages 3 and 4).

2 List every form
Fill in the form inventory, one row per form, before you add new ones (page 6).

3 Write the brief
Copy the form brief for each form: purpose, pages, editor, matching and owner (page 8).

4 Plan the fields
Map every visible and hidden field to a property, with one line on why you ask (pages 9 and 10).

5 Decide consent, spam and follow-up
Choose a consent option, the spam protection and what happens after submit (pages 11 and 12).

6 Test, launch and review
Run the launch checklist, log test submissions, then review conversion monthly (pages 13 and 15).

What is inside

Page	Section	Use it to
03	**Reference: plans and editors**	Check which plan each form feature needs, and new vs legacy editor
04	**Reference: how fields map to records**	Understand matching, hidden fields, query strings and validation
05	**Reference: spam, consent and follow-up**	Know how spam is caught, the consent options and follow-up by plan
06	**Form inventory**	Record every form, its purpose, pages, consent, follow-up and owner
07	**Worked example**	See a complete plan for a demo request form
08	**Form brief**	Plan one form before you build it
09	**Field plan worksheet**	Map every field to its property, object, type and reason
10	**Hidden fields and query strings**	Plan source tracking values and build the URLs that pass them
11	**Consent and spam protection**	Choose the consent option and the right spam protection for each form
12	**Follow-up and notifications**	Decide the thank-you step, who is notified and the follow-up
13	**Launch checklist and test log**	Catch the settings that break forms quietly, and prove each one works
14	**Troubleshooting**	Find out why submissions go to spam or records get overwritten
15	**Monthly conversion review**	Track views, submissions and conversion rate, and every change

Tip: Every worksheet is fillable in Acrobat Reader, Preview or your browser, or print it. Copy the brief and field plan for each form. A spreadsheet version is on the template page at pipelinesync.net.

REFERENCE · CHECKED OCTOBER 2026

Plans, features and the two form editors

Forms are available on every HubSpot plan, including free: you can build them, embed them, add reCAPTCHA and consent, and send a follow-up email. Paid plans add form steps, domain blocking, conditional logic and more automation. HubSpot now labels the old editor legacy and recommends the updated editor for new forms.

Which plan each feature needs

Feature	Plan needed (HubSpot knowledge base, October 2026)
Forms, embedding, reCAPTCHA, consent, hidden fields, notifications	All plans, including free
Form steps (up to 20 per form)	Any Starter, Professional or Enterprise subscription
Progress bar	Marketing Hub Starter, Professional or Enterprise
Block email domains	Marketing Hub or Content Hub Starter, Professional or Enterprise
Conditional logic (updated editor)	Marketing Hub or Content Hub Professional or Enterprise
Smart forms, AI translation, gibberish detection	Marketing Hub or Content Hub Professional or Enterprise
Dynamic query strings (personalization tokens)	Marketing Hub Professional or Enterprise
Progressive and dependent fields (legacy editor only)	Marketing Hub, Service Hub or Content Hub Professional or Enterprise
Form shortening (updated editor only)	Any hub at Starter or above, or Smart CRM Professional or Enterprise
Regex validation rules, custom reports	Professional or Enterprise
Compare up to 10 forms; campaign association	Marketing Hub Professional or Enterprise

HubSpot's pages disagree on the number of conditional logic rules per form and the plan needed to redirect to a scheduling page: check both in your account. Other limits: three fields side by side, 100 MB file uploads, 1,000 stored submissions per contact.

New editor or legacy editor

Updated editor USE FOR NEW FORMS

- Property validation rules are **enforced**
- Form shortening, AI translation, global form events
- Phone country code follows the visitor's IP
- No calculation, rollup, rich text, URL, HubSpot user or date and time picker properties

Legacy editor EXISTING FORMS

- Property validation rules are **not enforced**
- Progressive and dependent fields, raw HTML forms
- Phone country code dropdown can be removed
- No score, calculation, rich text or HubSpot user properties

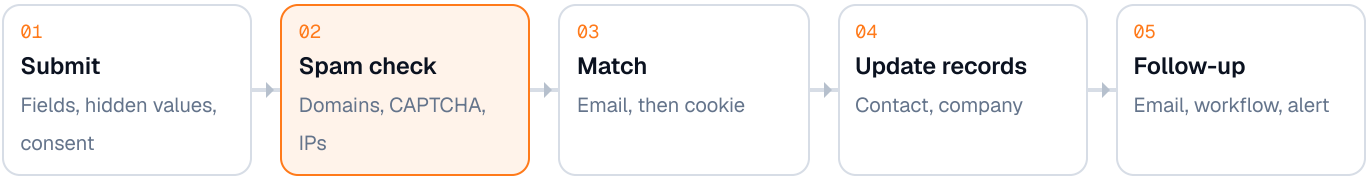
No migration path: HubSpot didn't document one when we checked, so moving a legacy form means rebuilding it.

REFERENCE · CHECKED OCTOBER 2026

How form fields map to records

> Each field writes to the property it is connected to, and that property decides the object, usually contact or company. HubSpot deduplicates contacts by email. If the setting to create new contacts for unknown emails is off, HubSpot may update a contact from the browser cookie instead, which can overwrite records.

What happens when someone submits



Matching rules to plan around

Setting or field	What HubSpot does
Email field	Contacts are deduplicated by email address. Submitting a contact's secondary email overwrites the existing email address.
Create new contacts for unknown emails: off	HubSpot first matches the email; if no contact exists, it may update a contact based on the browser cookie, which can overwrite contacts.
Create new contacts for unknown emails: on	The cookie isn't used, and pre-populating fields and the reset link are turned off. Progressive fields can't be used. (Called "Always create contact for new email address" in the legacy editor.)
Company domain name field	Updates the existing company with that domain, or creates a new one.
Unique value properties	Not supported in forms.
hubspotutk cookie	Passed on submission and used to deduplicate contacts; it expires in six months. API submissions pass it as `context.hutk`.
Ticket fields (legacy)	Only with automatic ticket creation on. Accounts created after 1 April 2024 can only create tickets from forms connected to help desk.

Hidden fields and query strings

- Hidden fields work on all plans. A required field **can't be hidden**.
- Pre-population may overwrite a hidden field's value.
- Static query strings pre-fill fields on all plans; they can't fill dependent fields.
- Checkbox values are `true` or `false`, dates `YYYY-MM-DD`, multiple values separated by `;`, spaces as `%20`.

Validation

- Built-in email checks: format, the domain blocklist, DNS (MX or A record) and global deliverability blocks.
- Phone properties validate to E.164 on all plans.
- Property validation rules apply to updated-editor forms only; regex rules need Professional or Enterprise.
- Live validation is on by default on all plans.

Non-HubSpot forms (captured by the tracking code) map values only to single-line text properties, can't use hidden or sensitive fields, and add all submissions with the same cookie to the same contact. An account can create up to 10,000 of them.

REFERENCE · CHECKED OCTOBER 2026

Spam, consent and follow-up

Add every site you embed on to the form's allowed domains, or HubSpot marks those submissions as spam. reCAPTCHA is on all plans, but with CAPTCHA on, the forms API and integrations can't submit. Spam submissions don't create records, trigger automation or count in analytics, and are deleted after 90 days.

Spam protection

Protection	How it works	Plan
Allowed domains	Submissions from domains not added are marked as spam	All plans
reCAPTCHA v2 or v3	v2: checkbox or puzzle; v3: invisible, sensitivity 0.1 to 0.9	All plans; blocks API submissions
Block email domains	Free or specific domains, per form or account-wide	Marketing Hub or Content Hub Starter+
Gibberish detection	AI-powered detection of nonsense entries	Marketing Hub or Content Hub Pro+
Excluded IPs and referrers	Marked as spam; on by default	All plans
Spam tab and daily digest	Review spam per form; daily email	All plans

Consent options

Implicit + checkboxes
Consent to process on submit; checkboxes for communications.

Separate consents
Can't submit without the processing checkbox.

Legitimate interest
A notice only, no consent checkbox.

All plans. The communication checkbox can't be pre-selected, and form consent covers marketing emails, not SMS. Data privacy settings need Super Admin or Edit account defaults permission and are on by default for EU-hosted accounts. Changing the default consent text doesn't update existing forms: delete and re-add the privacy field.

Follow-up by plan (form simple workflows)

Plan	Simple workflows per form	Actions per workflow
Free (send an email after submission only)	1	1
Starter, Professional or Enterprise without Marketing Hub	1	3
Marketing Hub Starter	1	Up to 10
Marketing Hub Professional or Enterprise	Multiple	Unlimited

Follow-up emails only reach **marketing contacts**. Notifications are on all plans; recipients set on a HubSpot page override the form's. After submit: a thank-you message, or a redirect to a page, URL, meeting link or payment link.

WORKSHEET

Form inventory

One row per form, including legacy and non-HubSpot forms. Name forms **Purpose | Placement**, for example Demo request | Website. Fill this in before building new forms and update it at every monthly review.

ID	Form name	Purpose	Pages or sites	Editor	Campaign	Consent option	After submit	Notify	Follow-up	Spam	Owner	Status
F-01	*Demo request | Website*	*Book a demo with sales*	*/contact/, pricing page*	*New*	*Q4 demand*	*Implicit + checkbox*	*Meeting link*	*Sales team*	*Set lead status; notify owner*	*reCAPTCHA v3*	*Marketing ops*	*Live*

Editor: New, Legacy, Non-HubSpot. Consent: Implicit + checkbox, Separate consents, Legitimate interest, None. After submit: Message, Page, URL, Meeting link, Payment link. Status: Draft, Live, Retire.

WORKED EXAMPLE · ILLUSTRATIVE

Demo request | Website

An illustrative plan for a demo request form. Your fields, teams and pages will differ; the point is how much is decided before building.

Purpose	Book a demo with sales and route the request to the right team.
Pages	/contact/ and the pricing page, both on the main website (embedded)
Editor and plan	Updated editor. Domain blocking needs Marketing Hub Starter or higher.
New contacts for unknown emails	On, so a shared computer's cookie can't overwrite another person's contact
Consent	Implicit consent to process, with an unticked checkbox for marketing emails
Spam protection	Allowed domains added; reCAPTCHA v3; free email domains blocked
After submit	Redirect to the sales team's meeting link
Notifications and follow-up	Notify the sales team; simple workflow sets Lead status and notifies the owner
Campaign and owner	Q4 demand · Marketing ops

Field plan

Field label	Property	Object	Type	Req.	Hidden	Pre-fill / query	Why we ask
Work email	`email`	Contact	Email	Yes	No		Identify and deduplicate the contact
First name	`firstname`	Contact	Single-line text	Yes	No		Personalize the follow-up
Company domain	`domain`	Company	Single-line text	No	No		Match or create the company
Company size	`company_size`	Contact	Dropdown	Yes	No		Route to the right team
Lead source detail	`lead_source_detail`	Contact	Single-line text	No	Yes	`source` = Paid search	Reporting; hidden fields can't be required

Test submission

Test contact, Company size 51-200, URL with ?`source=Paid%20search`. Expected: new contact, Lead source detail = Paid search, company matched by domain, sales notified, redirect to meeting link. Result: pass.

First monthly review

2026-10: 1,200 views, 36 submissions, conversion rate 3.0%, 4 spam submissions. Change made: removed the phone field, which nobody used for routing. Compare next month.

All values on this page are made up for illustration. company_size and lead_source_detail are example custom properties.

WORKSHEET · COPY FOR EACH FORM

Form brief

Form name and ID	
Purpose (one sentence)	
Pages or sites it appears on	
Placement	☐ HubSpot page ☐ Embedded on external site ☐ Standalone form page ☐ Non-HubSpot form
Editor	☐ Updated editor ☐ Legacy Why legacy: _____
Plan features needed (page 03)	
Campaign	
Owner	

Who fills it in, and what they should get

Records it creates or updates	☐ Contact ☐ Company ☐ Ticket ☐ Custom object
New contacts for unknown emails	☐ On ☐ Off Why: _____
Steps	☐ Single step ☐ Multi-step, number of steps: _____ (max 20)
Consent option (page 11)	
Spam protection (page 11)	
After submit (page 12)	
Success measure	

DONE FOR YOU

Rather hand your forms to a HubSpot Gold Partner?

We plan the fields, set up spam protection and consent, connect every form to routing and follow-up, and fill in this template for you.

Book a free consultation

WORKSHEET · COPY FOR EACH FORM

Field plan

Form: _____ One row per field, visible or hidden. If you can't write why you ask for a field, or nothing uses it, remove it.

Field label	Property (internal name)	Object	Field type	Req.	Hidden	Default or pre-fill	Query param	Validation	Used by	Why we ask
Work email	*email*	*Contact*	*Email*	*Yes*	*No*			*Block free domains*	*Matching*	*Identify and deduplicate the contact*

Object: Contact, Company, Ticket, Custom object. Field type: Single-line text, Multi-line text, Email, Phone, Number, Dropdown, Radio, Checkbox, Multiple checkboxes, Date, File. Used by: Routing, Scoring, Personalization, Reporting, Matching. A required field can't be hidden.

WORKSHEET

Hidden fields and query string planner

Hidden fields carry details the visitor shouldn't have to type, such as lead source or the offer they came from. Plan each value, where it comes from and the parameter that passes it, then build every link the same way.

Hidden field	Property	Source	Parameter	Allowed values	Overwrite risk and notes
Lead source detail	*lead_source_detail*	*Query string*	*source*	*Paid search; Partner; Event*	*Pre-population may overwrite it*

Source: Static default, Query string, Dynamic query string (personalization token). Keep allowed values to a fixed list so reports group cleanly.

Link builder

Page URL: _____

?_____=_____ &_____=_____

&_____=_____ &_____=_____

Used in (email, ad, partner link): _____

Format rules (HubSpot)

- Checkbox values: `true` or `false`
- Dates: `YYYY-MM-DD`
- Multiple values: separate with `;`
- Spaces: `%20`
- Query strings can't fill dependent fields

Plan checks

- [ ] No hidden field is required
  HubSpot doesn't allow it
- [ ] Dynamic tokens only where they work
  Marketing Hub Pro+; not on standalone form pages
- [ ] Test link submitted and value checked
  Log it on page 13

WORKSHEET · COPY FOR EACH FORM

Consent and spam protection

Form: _____ Decided by: _____

Consent and privacy

Data privacy settings on?	☐ Yes ☐ No (Super Admin or Edit account defaults; on by default for EU-hosted accounts)
Consent option	☐ Implicit + checkboxes ☐ Separate consents ☐ Legitimate interest ☐ None
Why this option	
Notice text checked by	
Privacy policy link	

Communication checkbox (subscription type)	Label shown to the visitor	Used by

Checkboxes can't be pre-selected, and form consent covers marketing emails, not SMS. Changing default consent text doesn't update existing forms: delete and re-add the privacy field.

Spam protection decision

Question	Answer	Decision
Does an integration or the API submit to this form?	☐ Yes ☐ No	If yes, leave CAPTCHA off: it blocks API submissions
Every embedding domain in allowed domains?	☐ Yes ☐ Not embedded	
CAPTCHA	☐ Off ☐ v2 ☐ v3	v3 sensitivity (0.1 to 0.9): _____
Need business emails only?	☐ Yes ☐ No	Block free domains: ☐ this form ☐ account-wide
Gibberish detection (Marketing or Content Hub Pro+)	☐ On ☐ Off / n.a.	
Who reviews the spam tab or daily digest?		

WORKSHEET

Follow-up and notification plan

Decide what the visitor sees, who hears about it and what happens next. Use the form's simple workflows for an email or a few actions; use a full workflow triggered by the submission for routing, lead status and anything conditional.

Form	After submit	Notify	Simple workflow actions	Full workflow	Response owner and time
Demo request | Website	*Meeting link*	*Sales team*	*Set lead status; notify owner*	*Lead | Assign owner | Inbound demo*	*Sales manager, same business day*

After submit: thank-you message, page, URL, meeting link or payment link. Simple workflow actions depend on your plan (page 05).

Follow-up email

Email name and subject	
What it delivers	
Marketing contact status	☐ Set as marketing contact on submit ☐ Not needed (no follow-up email)

Notification checks

- ☐ Recipients set on the form
  Notifications are on all plans
- ☐ Page-level recipients checked
  Recipients set on a HubSpot page override the form's
- ☐ Custom notifications built in a workflow
  Needs Professional or Enterprise workflows
- ☐ Someone owns the response
  Name and time agreed above

Follow-up checks

- ☐ Follow-up goes to marketing contacts
  Form follow-up emails only reach them
- ☐ Redirect or meeting link tested
  Log it on page 13
- ☐ Full workflow listed in the inventory
  One owner per property it writes
- ☐ Simple workflow fits your plan
  Actions per workflow on page 05

WORKSHEET · BEFORE EVERY LAUNCH

Launch checklist and test submission log

Form: _____ Launch date: _____

- [ ] Embed domains in the allowed domains
  Others are marked as spam
- [ ] Tracking code on every page with the form
  Needed for analytics on external sites
- [ ] CAPTCHA decided
  With it on, the API and integrations can't submit
- [ ] Consent option and text checked
  Communication checkbox not pre-selected
- [ ] Email domain blocking set if needed
  Per form or account-wide
- [ ] Create-new-contact setting decided
  Off: the cookie can overwrite records
- [ ] Every field matches the field plan
  Property, required, hidden, validation
- [ ] Notification recipients set
  Page recipients override the form's
- [ ] Follow-up email goes to marketing contacts
  Only they receive it
- [ ] Thank-you message or redirect works
  Page, meeting link or URL
- [ ] Test submission updates the right records
  Every property in the field plan
- [ ] Form associated with its campaign
  Keeps campaign reporting complete

Test submission log

Use a test email you control. Write what you expect before submitting, then check the contact record, hidden values, notification and redirect.

Date	Test record and URL	Expected result	Actual result	Result	Fix needed	By
2026-10-27	*Test contact, ?source=Paid%20search*	*New contact; source set; sales notified*	*As expected*	*Pass*		*Mkt ops*

Approved by		Date	

TROUBLESHOOTING

When a form doesn't do what you expected

Why submissions go to spam

> The most common cause is embedding the form on a domain that isn't in its allowed domains. Excluded IP addresses and referrers, and bot detection, also mark submissions as spam. Spam submissions don't create records or trigger automation, so check the form's spam tab and the daily digest before the 90-day deletion.

Symptom	Likely cause	Where to look
Real submissions in the spam tab	Embedding domain not in allowed domains, or an excluded IP or referrer	Form's allowed domains; spam tab
Integration submissions rejected	CAPTCHA is on, so the API and integrations can't submit	Form's CAPTCHA setting
No views on an external site	Tracking code missing; API submissions never record views	Page source; form performance
Visitor can't submit	Blocked or disposable email domain, failed email or validation checks	Domain blocking; property validation

Why records get overwritten

> With the setting to create new contacts for unknown emails turned off, HubSpot matches a new email to the contact in the browser cookie, so a shared computer can update the wrong person. Submitting a secondary email also overwrites the primary one. Hidden values can be overwritten by pre-population.

Symptom	Likely cause	Fix
Another person's name on a contact	Cookie match with create-new-contact off	Turn the setting on for that form
Contact email changed	A secondary email was submitted	Review the contact record
Source value replaced	Pre-population overwrote the hidden field	Review the hidden field plan, page 10
Company details changed	Company domain field updated the matching company	Decide if the form should ask for domain

Your troubleshooting notes

Date	Form	What happened	Cause and fix

WORKSHEET · ONCE A MONTH

Monthly conversion review

Copy views, submissions and spam for each form from its performance view. Conversion rate is submissions divided by views, as HubSpot defines it. Leave API-fed forms out of the comparison: their submissions don't record views.

Month	Form name	Views	Submissions	Conv. rate	Spam	Top source	Change made	Notes
2026-10	*Demo request | Website*	*1,200*	*36*	*3.0%*	*4*	*Organic search*	*Removed phone field*	*Example row*

- [ ] Spam tab reviewed
  Real submissions released or domains fixed
- [ ] Unused fields removed
  Nothing in routing, scoring or reports uses them
- [ ] Inventory matches HubSpot
  New, retired and legacy forms on page 06

PipelineSync

HUBSPOT GOLD SOLUTIONS PARTNER

Want your forms planned, built and connected for you?

We inventory every form, remove fields nobody uses, fix spam and consent settings and connect each form to routing and follow-up, then hand over this template filled in.

HubSpot implementation and onboarding

Design and build of the full HubSpot structure: properties, pipelines, lifecycle stages, forms, workflows and dashboards, with SOPs and training.

CRM cleanup and data quality

Deduplication, field standardization, and the validation rules, required properties and naming conventions that keep HubSpot clean.

RevOps infrastructure, lead to close

Lifecycle stage definitions, lead scoring and routing with SLAs and fallback owners, sales and marketing automation.

HubSpot audit

A structured review of your portal, data, automation and reporting, with prioritized recommendations.

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pipelinesync.net
allentrinidad@pipelinesync.net

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