Creating and managing forms in Slidecrew

Version: 1.0
Date: July 2026
Prepared by: David Richards

For support, contact support@slidecrew.com

Creating and managing forms in Slidecrew

This guide explains how organisers create forms, decide who receives them, filter them with custom data, and download completed responses as PDFs or spreadsheet reports.

It is intended for organisers who already have an event portal with speakers, moderators, sessions, and presentations in place.

Before you start

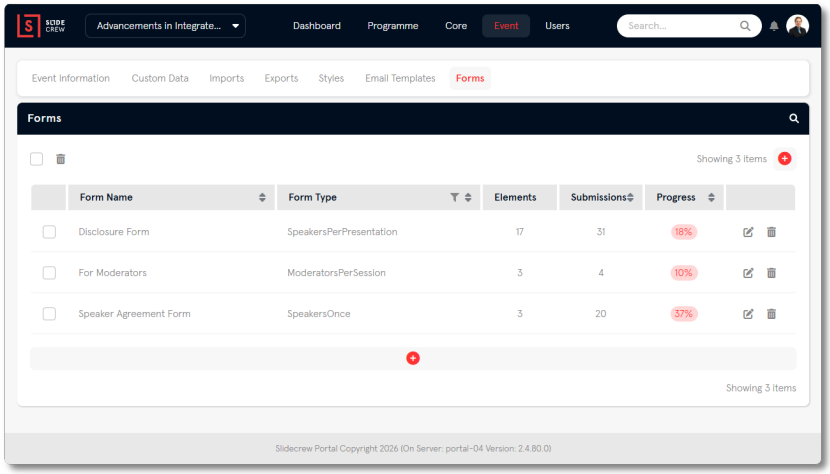
Make sure the following are in place:

- **Admin or Organiser access** → Only Admin and Organiser users can create and manage forms, export form data, and copy forms to another event.
- **Attendees in the event portal** → Forms are completed by speakers, moderators, and ePoster submitters through their personal pages or on-site apps. Attendee roles do not have portal access.
- **Any custom data fields you plan to use** → If you want to limit a form to a specific group, create the relevant custom data field before setting the form filter.
- **Email templates for personal links** → Speakers use their upload link. Moderators use the moderator page link generated by the `{moderatorlink}` tag.

How forms work in Slidecrew

Forms collect signatures, disclosures, or other responses from speakers and moderators. Once a form is created, it appears on the Speaker Upload Page or the Moderator page, depending on the form type.

Forms are managed from **Event → Forms**. Submitted forms can also be checked from the form sidebar, from an individual speaker's Speaker Overview Page, and from the event export page.



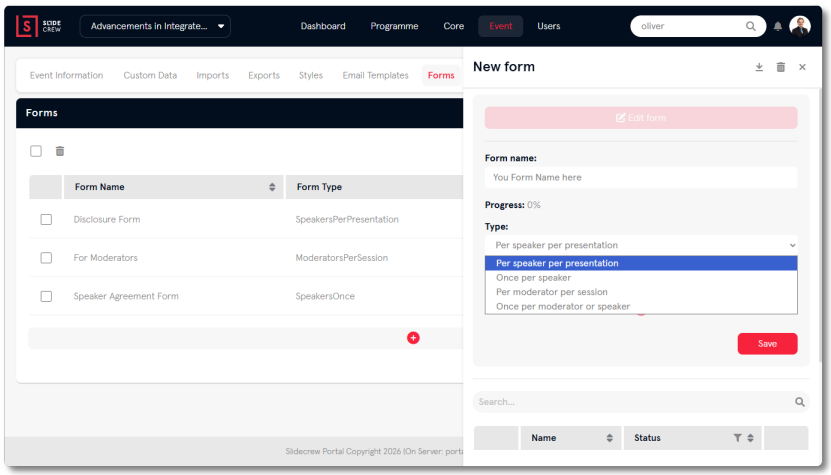
Who can complete each form type

When you create a form, the **Type** determines who receives it and how often they complete it.

Type	Who completes it
Per speaker per presentation	Each speaker sees the form once for each of their presentations.
Once per speaker	Each speaker sees the form once, even if they have several presentations.
Per moderator per session	Each moderator sees the form once for each of their sessions.
Once per moderator or speaker	Each person sees the form once.

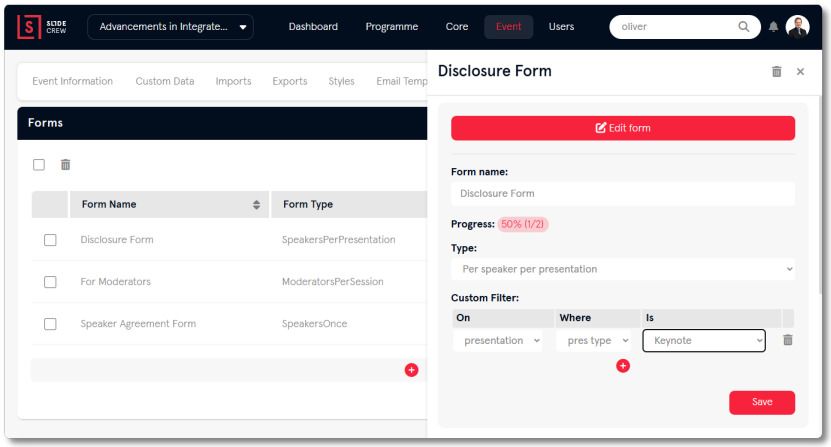
ePoster submitters are treated as speakers for form assignment.

Create a form



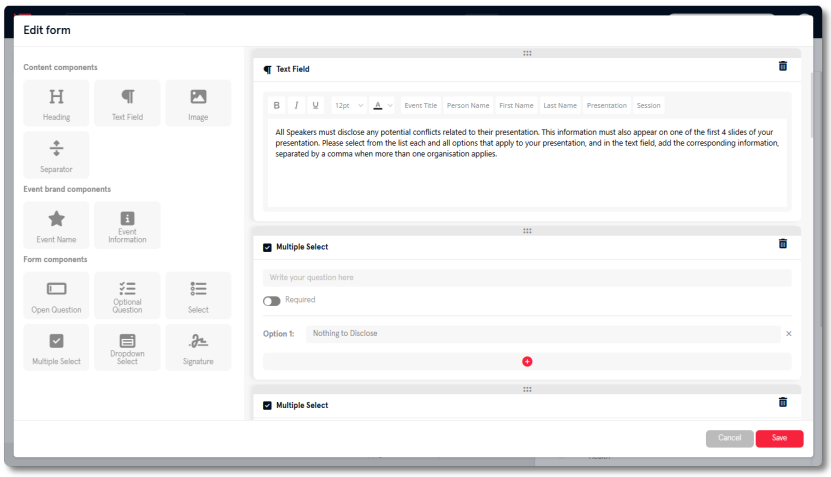
1. In the top menu, go to **Event**.
2. Click **Forms**.
3. Click the ➕ button.
4. Enter a **Form name**.
5. Select a **Type**.
6. Click **Save**.

After the form is saved, the **Edit Form** button and **Custom Filter** table become active.



Build the form content

1. With the form selected in the **Forms** list, click **Edit Form**.
2. The **Form Editor** opens as a pop-up.
3. Drag blocks from the left panel into the editing area on the right.
4. Click **Save**.



Form block types

Blocks are dragged from the left panel of the **Form Editor** into the editing area. They fall into three groups.

Content components

Block	What it does
Heading	Adds a text heading. Set it to H1, H2, or H3.
Text Field	Adds a rich text block with formatting options. Supports `{eventname}`, `{fullname}`, `{firstname}`, `{lastname}`, `{presentation}`, and `{session}`.
Image	Adds an uploaded image. Adjust alignment and scale after inserting it.
Separator	Adds a divider, white space, or a page break.

Event brand components

Block	What it does
Event Name	Displays the event's full name as a heading. Set it to H1, H2, or H3.
Event Information	Displays the event location, organising company, website, and start and end dates.

Form components

Block	What it does
Open Question	Adds a free-text answer field. Required by default.
Optional Question	Adds a free-text answer field that is not required.
Select	Adds a single-select multiple-choice question.
Multiple Select	Adds a multiple-choice question where more than one answer can be selected.
Dropdown Select	Adds a single-choice question presented as a dropdown list.
Signature	Adds a field where the recipient writes their signature.

Limit a form with custom data filters

By default, a form is sent to all attendees of the selected form type. Use the **Custom Filter** table when only part of that group should receive the form.

For example, if a Presentation custom data field marks some presentations as `Keynote`, you can limit a speaker form to speakers assigned to those presentations.

To add a custom data filter:

1. With the form selected, locate the **Custom Filter** table.
2. Click the ⊕ button to add a filter row.
3. Complete the filter row.
4. Add more filter rows if needed.
5. Click **Save**.

Each custom filter row has four fields:

Field	What to select
On	Select the custom data category: **Person**, **Presentation**, **Session**, **File**, or **Room**.
Where	Select the specific custom data field.
Condition	Select **Is** or **Is Not**.
Value	Select the value to filter by.

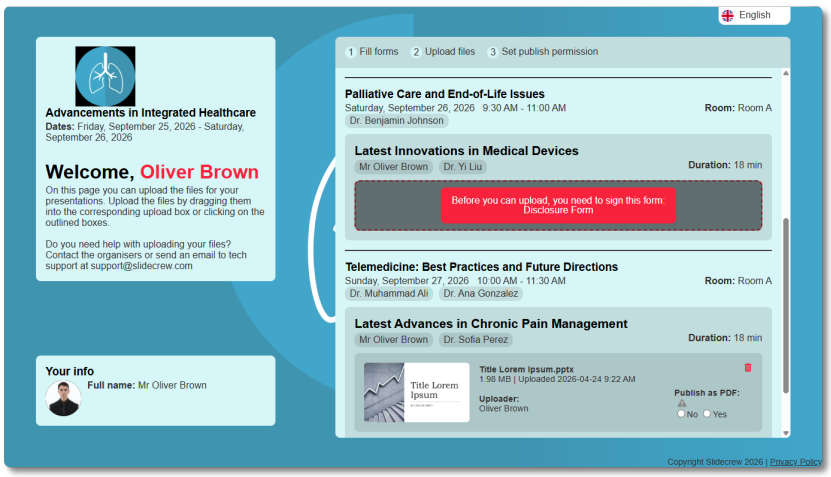
The **Value** dropdown depends on the custom data field type:

- For **Text** fields, the dropdown shows text values already entered for that field.
- For **Number** fields, the dropdown shows numbers already entered for that field.
- For **Yes/No** fields, the dropdown shows **Yes** and **No**.

If a value is missing from the dropdown, check that the custom data field exists in the correct category and that at least one matching value has been entered.

What speakers and moderators see

Speakers open their personal upload link and complete forms from the Speaker Upload Page.



If the organiser has created forms, the **Fill forms** step appears at the top of the upload page. For forms that apply once per speaker, a pop-up may appear the first time the speaker opens the upload page.

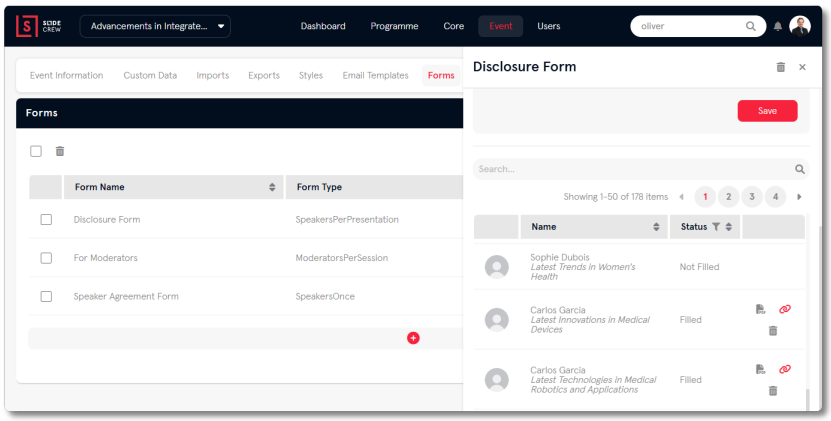
Each relevant form has to be completed before the file upload areas for the related presentations can be used. If **Show unfilled form pop-up** is enabled in the upload page settings, speakers are reminded to complete any outstanding forms when they open the upload page.

Moderators use the Moderator page, opened from the personal link generated with the `{moderatorlink}` email tag. Moderator forms appear according to the selected moderator form type.

In the Speaker Service Centre App, outstanding forms appear one at a time before the speaker can access their files.

Check form submissions

1. Go to **Event → Forms**.
2. Click the form in the **Forms** list to open its sidebar.
3. Review the submissions table.



Each row includes three actions:

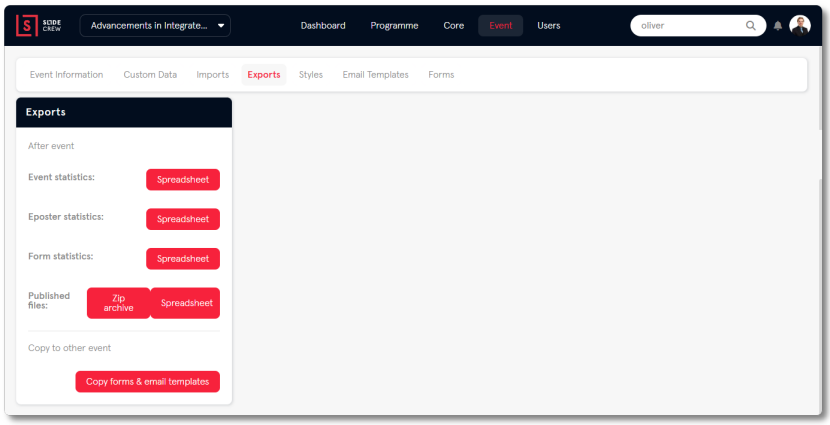
- **PDF** → Downloads that submission as a PDF.
- **Link** → Opens the submission in a new tab.
- **Delete** → Deletes the submission.

Submitted forms are also listed on the speaker's Speaker Overview Page. The **Forms** list shows the form name, submission date, and a PDF download icon.

Export form reports

Use the form report when you need a spreadsheet copy of all form submissions.

1. In the top menu, go to **Event**.
2. Click **Exports**.
3. Under **Form statistics**, click **Spreadsheet**.

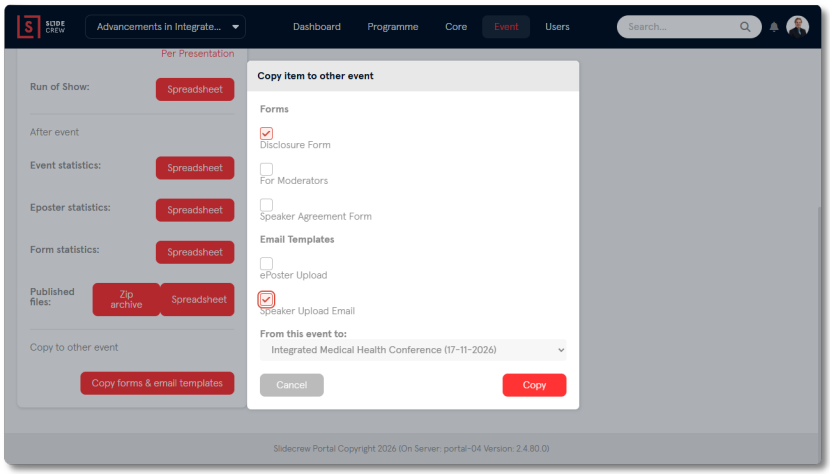


The download includes one sheet per form, with one row per submission.

Copy forms to another event

If you want to reuse forms in a future event, copy them from the Exports page.

The Exports page includes the **Copy to other event** section and the **Copy forms & email templates** button.



1. In the top menu, go to **Event**.
2. Click **Exports**.
3. Scroll to **Copy to other event**.

4. Click **Copy forms & email templates**.
5. Select the forms or templates you want to copy.
6. Select the destination event.
7. Click **Copy**.

This option is only available to Admin and Organiser users.

Related guides

Use these guides when the forms workflow connects to another part of Slidecrew:

- Email templates, campaigns, and custom data filtering → Use this when you need to send upload links, send moderator page links, use the **Missing Form** email filter, or filter campaigns with custom data.
- Importing your programme from a spreadsheet → Use this when custom data values need to be imported with the programme before they can be used in form filters.
- Speaker Ready Room on-site workflow → Use this when outstanding forms affect the on-site speaker check-in flow.