

28 THINGS

That the India Visa form didn't do, but you should



1

Trust & Security

First impressions count

If your website looks shonky and doesn't have sufficient trust indicators then your users will think twice about using it, especially if the information you're asking is highly sensitive.

Don't cheapen your website with shady practices - your users are smarter than you think.

2

Page Hierarchy

Make it obvious

Organise your page structure and content in a way that allows your user to identify the task they need to complete. Provide supporting content around the primary CTA to ensure the user can make the right choice, first time.

3

Progress

Signposting

If you expect someone to go on a journey with you (such as a long form) then provide waypoints so they can understand where in that journey they currently are, how far to reach the destination and how to make a u-turn if required.

4 Set Expectations

Upfront information

If your task requires your user to have information before they start the task, tell them what it is.

If something has to be in a particular format, tell them which one.

If something has to be a certain size, tell them the restriction.

5

Is it Mandatory

Or optional?

If most things are mandatory, then only highlight what is optional in a clear way.

This reduces page clutter and cognitive load.



Captchas

Necessary evil

If you must use a captcha, then make sure that it is accessible.

Always provide a fall back option for users who can't get past the captcha.

A captcha should not be a digital barrier for users who genuinely need to use what ever it is you're offering.

7

Drop downs

When, why and how?

Only use drop downs when you need the user to choose from many options.

Smart defaults should be used when you know some options are more popular than others.

The rest should be listed alphabetically with a search option



Dialogues

Relevancy & timing

On page dialogues should only be used in the most important of circumstances.

If they are used, they should be presented in a uniform way, contain clear and precise information and have clear options to dismiss.



More info

Help that is helpful

Provide tooltips and help that offer further advice to complete an input successfully.

Detailed help can be given for those that need it behind a link.

10 Date pickers

Appropriateness

Calendar interfaces should NOT be used when the user has to select a date (such as DOB).

I can not emphasis this enough.

Also for mobile, stop using the Apple OS default triple wheel of fortune (sorry torture) for date entry. It sucks.

11

Field Labels

Clarity & language

Labels should be above the related input.

Labels should accurately describe the information required.

Language should be as universal as possible and user friendly.

12 Errors

Solutions & rectification

Return errors during form input completion and in real time (not post submit)

Error messages should be specific to the related problem and presented within close proximity to it.

Error messages should provide clear guidance to rectify an issue.

Do not rely on colour alone to highlight an error

13 Formatting

Pre or post submit

If you must format data entry for the DB requirement then do it behind the scenes.

There is no need for your user to wonder why you're modifying their data for them - that's a YOU job.

14 Logic

Based progression

Ask questions to understand if a user needs to see a particular part of a form or not.

Only show information that is relevant to your user right now.

15 Saving Information

For complex forms, always allow your user to save their progress at any point during the form filling process.

Give clear instructions how to return to the form, backed up with an email confirmation with the necessary instructions.

Provide an auto-save feature.

16 Cognitive Overload

Be mindful of how many questions you present at once. No one likes being talked at.

Use a logical flow. Chunk related information. Use progressive disclosure and minimise fields.

Also use inline validation, familiar inputs and reduce distractions.

17 Navigation

And editing

Allow users to navigate all steps of your form, especially those they have already completed.

Provide the option to edit an answer given previously if you present that answer further along in the form.

18 System status

Reassurance & relevancy

If you have an auto-save feature, clearly demonstrate the last time the form was saved (date & time).

Provide the option to manually save.

If a session is about to expire, then notify the user with ample time and provide the option to save and/or continue.

19 Diversity

And inclusion

Make sure very sensitive questions (gender, marital status etc) provide options that are inclusive.

No one likes being put in a box, so at least off the option to customise it.

20 Necessary

And optional requests

Analyse the questions you are asking and why.

Is there a genuine NEED to ask this question, or is a nice to have?

If it's the latter, evaluate the ROI of knowing the answer compared to getting somebody to complete the form without it.

21 Input Types

Appropriateness

Make sure the input you use is fit for purpose.

Ask if another type can do the job quicker and more efficiently.

For text inputs, always ensure the length of the input is representative of the amount of data you expect to receive.

22 Grouping

Related information

Group fields that are related to each other so the user can scan the section easily.

This also helps reduce cognitive load by visually representing related information together and focusing the users attention to the current task.

23 Consistency

Of input types

If you choose a particular input type for a particular task (eg. country selection) then make sure you use that input type for the same purpose throughout your form.

Providing consistency reduces friction and increases efficiency.

24 Setting Limits

Character restrictions

If you **MUST** set a character limit on an input type, then make sure the user is aware of it before they start entering data. Also...

Provide a real time character counter (x characters remaining).

Make sure any character limit is reasonable given the type of data you expect.

25 Data Patterns

Guidance

If you **INSIST** on users entering data in a particular way (eg. phone number with country code) then give explicit guidance and examples as to what you expect it to be.

Better still, design the UI so that the data pattern can easily be entered.

26 Prefilling Information

If you prefill information that has already been entered on a form at a later point in that form, then

Make sure it is replicated exactly as entered.

Provide a way to edit the information if required.

27 System Errors

Recovery

Plan for “WTF” moments (HTTP 500, 404 errors etc).

If encountered, provide clear instructions for the user about how to recover or who to contact.

No one wants to see a default system status page. Make it your mission to customise them to be helpful.

28 Law of Proximity

The closer the better

Make sure that functions on a form (eg. quantity steppers, attach a file etc) are located close to the question or action they are related to.

Learned something?



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