

The following describes how the guest registration form works:

1. You access the form using the link below from any browser on any type of computer or tablet.

<http://www.webform.topbuildersolutions.net/Chafin/chafinguestregistration.aspx>

CHAFIN

COMMUNITIES

Move To Come Home to...

First Name:*	Last Name:*
<input type="text"/>	<input type="text"/>
Email:*	
<input type="text"/>	
Home Phone:	Mobile Phone:
<input type="text" value="(###) ### ####"/>	<input type="text" value="(###) ### ####"/>
Comments/Message:	
<input type="text"/>	

Please include me on your promotions and newsletter

2. We recommend you save the link as an icon on your home page (on a tablet) or on the desktop of a windows/mac.
3. When the guest hits the submit button, the data is validated and a lead is created based on the selections made.
 - a. The proper community is assigned to the lead/
 - b. The sale agent in that community is assigned to the lead,
 - c. We assign a priority, status, lead type, etc.
4. A thankyou message appears with an OK button. If they press ok, the form refreshes. If they don't press ok, the form refreshes automatically after 5 seconds.

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5. Since the guest is physically present, there are no alerts are sent but this can be changed in the form set-up (see below)
 6. A follow-up plan is assigned to the lead which can be changed in the setup
 7. A thank you email is sent to the person filling out the form.
 8. Please test the form to make sure it properly fits on the monitor you plan to use.
 9. Call or email if you have any questions or need any help.


Changing the form setup (assignments, alert, etc.)

1. Log into TopBuilder
2. Go to the Setup Menu then > Manage Online Contact Form Processing Rules

The screenshot shows the TopBuilder software interface. At the top, there is a navigation bar with 'ilities', 'Setup' (with a gear icon), 'Help Center' (with a question mark icon), and 'Quick Links:'. Below this, a dropdown menu is open under 'Setup', listing several options: 'My Profile', 'Account (Company) Profile', 'User Setup (Administrators)', 'Manage Follow-Up Plans', 'Manage Automated Emails', 'Manage Lead Status Values', 'Manage Communities', 'Manage Online Contact Form Processing Rules' (highlighted with a red arrow), and 'Manage Interface Processing Rules'. In the background, a table displays a list of processing rules. The table has columns for 'Owner', 'Hist', and 'Next'. The 'Owner' column lists 'Renee' for multiple rows. The 'Hist' column contains circular icons with a red 'X', and the 'Next' column contains clipboard icons. To the right of the table, there are summary statistics: 'There are 304 lea' and 'There are 0 tasks'. Below these are 'Key Statistics (for al)' including 'Active Leads (#/\$):', 'Conversion Rate/Fo', 'Sales Backlog-Won', 'Leads Won (Last 12', 'Leads Lost (Last 12', and 'Avg Days to Close ('.

3. Select the Guest Registration Form (the form below is an example for another builder)

Lead/Data Capture Form Information

Lead/Data Capture Form Name:
Guest Registration Form 
Guest Registration Form
Guest Registration Form

Lead/Data Capture Form Rule

Lead/Data Capture Form Rule Name:
Guest Registration form processing rule

Lead/Data Capture Form Rule Details

Rule Name:* Guest Registration form processing rule
Rule Description:* Guest Registration form processing rule

Lead Status: Prosp
Assign To: MacLees, Renee
Community:
Follow-up Plan: Quick Start-Visit Toured w/ Email
Priority: Unknown
Source:
Lead Type: GHO
Contact Type: Prospect

Share?

Send Alerts To:
 Croswell, Patti
 Garofalo, Cathv

4. If you have multiple rules for the form (i.e. a rule for each community), select the rule, change the values and hit the save button at the bottom.
5. Email or call support if you need additional assistance
 - a. support@topbuildersolutions.com
 - b. 855-806-6648 opt 2