## Phone Bank Webforms – One Time Contributions – User Guide

1. To find your state's phone bank webform template, go to File>Webform Builder.

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HOME DASHBOA	RD FILE S	EARCH F	UNDRAISING	ACTIVIT	IES EV
Quick Search		w Record		¢	
Search	New Indivi New Organ		Ctrl+Alt+O	quick access Iomepage ar	
Individual	New Legis     New Comr		Ctrl+Alt+L Ctrl+Alt+M	o today?	
Quick Search	New Recei	pt	<b>\$</b>		
Quick Entry	Ctrl- New Pledg		** *	nd input	
Use Quick Entry to inp with speed and accura	New Activ	ity	+	day.	
Quick Entry	Tools Programs		2		
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Your Export file	Import Ma Pledge Pro	-		walk lists	000000
From: nar.jennife Aristotle 360 Im From: Aristotle 3	port Repository	d d	=		

2. Type the word "phone bank" into the webform search field, and click Enter.

	Forms Phone Bank	D.			
	Name	Created On	Created By	Сору	Delete
=	2016 Phone Bank Template - Login	08/27/2015	Jennifer Ha	6	×
-	2015 MO AMP Form Hard	08/27/2015	Brett Loyd	<b>P</b>	×
	2015 MO AMP Form Soft	08/27/2015	Brett Loyd	<b>D</b>	×
	2015 MI RPAC/SWMichigan	08/27/2015	Laura Camp	<b>D</b>	×
-	DOLE TO CONTRACT OFFICE	00/07/001F	Banks Land	(Pa)	

3. Locate the webform specific to your state 2016 [State Abbreviation] Phone Bank click the Copy icon. E.g. 2016 AZ Phone Bank Template.

		L	•				
Web-Forms							
Name	Created On	Created By	Сору	Delete			
2016 Phone Bank Template - Login	08/27/2015	Jennifer Ha	<b>D</b>	×			
Template Online Form No Login	11/25/2013	Laura Camp	<b>D</b>	×			
Template Form with Login	11/25/2013	Laura Camp	<b>D</b>	×			
	Name 2016 Phone Bank Template - Login Template Online Form No Login	Name     Created On       2016 Phone Bank Template - Login     08/27/2015       Template Online Form No Login     11/25/2013	Name     Created On     Created By       2016 Phone Bank Template - Login     08/27/2015     Jennifer Ha       Template Online Form No Login     11/25/2013     Laura Camp	ms Name Created On Created By Copy 2016 Phone Bank Template - Login 08/27/2015 Jennifer Ha Template Online Form No Login 11/25/2013 Laura Camp			

4. Open the Copy of: 2016 AZ Phone Bank Template webform. A pop-up window will open.

Web-Forms							
Search: te	er j						
	Name	Created On	Created By	Сору	Delete		
==	Copy of: 2016 Phone Bank Template -	08/28/2015	Jennifer Ha	<b>D</b>	×		
==	2016 Phone Bank Template - Login	08/27/2015	Jennifer Ha	<u>h</u>	×		



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- You will be taken to the first step of the webform builder. 1. Components. Rename the webform according to this naming convention: Year – State Abbreviation – Local Name/Abbreviation – Phone Bank
   E.g. 2016 AZ SEVRAR Phone Bank
  - Click Save. Do this frequently.

Web Form	2016 Pho	e Bank Template - Login		owing naming convention: /RAR Phone Bank/Login	PREVIEW	🔡 SAVE	EMBED
1. Components	2. Form Option	3. User Options	4. Themes			Next	<b>&gt;</b>
Build Your Add form elements from		Basic Info					
- Basic Ir	ıfo .	Section Title:*					

6. On the **Basic Info** panel, update the **Federated Access** Local Association's 4-digit access code. The template will be set to the state's federated access.

Web Form 2016 Phone	Bank Template		
1. Components 2. Form Options	3. User Options	4. Themes	
Build Your Form Add form elements from the bank below.	Basic Info		
Basic Info	Section Title:*		
$\leftarrow$	Phone-a-Friend for RP	AC	
Credit Card Donation	FEDERATED		
	Federated Access *		
	AZ - (1470)	L.	
	AR - (1380) AR:806	<b>^</b>	
	Arizona AOR		
	AZ - (1385) AZ - (1395)	REQUIR	ED REA
	AZ - (1400) AZ - (1405)		1
	AZ - (1410)		-
Disabled Components	AZ - (1420) AZ - (1425)		•
	AZ - (1426) AZ - (1430)		
🥵 Group Options	AZ - (1430) AZ - (1435)		
	AZ - (1440) AZ - (1445)		
Pledge Program	AZ - (1450)		
Offline Donation	AZ - (1455) AZ - (1460)		
	AZ - (1465)	<b>V</b>	
Notes	AZ - (1470)	<b>▼</b>	

7. Click the panel for **Credit Card Donation** on the left hand side.



8. Scroll down to **Donation/Giving Levels**. To add an engagement levels, enter information into the Amount field and click Add. Repeat until all your engagement levels are there. If you want a special name to appear next to the engagement level, fill in the Label field. E.g. \$50 – Broker Level.

DONATION/GIVING LEVELS			
ENABLED			
Amount (in \$): *	Label:	Def	fault:
	Broker Level		Add
\$15.00 (Default)		۲	

To edit or remove an engagement level, click on the amount and click Edit to change the amount or click the red
 X to remove the amount.

DONATION/GIVING			
LEVELS			
ENABLED			
Amount (in \$): *	Label:	Defaul	t:
15.00		ø	Edit 🗙
\$15.00 (Default)		<b>^</b>	N
		*	4
		- -	

10. To allow investors to select their own engagement level, check the box that says Other Amount. Enter a label for how you want the field to display on your webform. E.g. Other Investment Amount. Click Save.

DONATION/GIVING			
ENABLED			
Amount (in \$): *	Label:	Default:	
15.00			Edit 🗙
\$15.00 (Default)	*	۲	
		S	
	Ψ.	•	
<ul> <li>Other Amount</li> </ul>			
Label: Please define label here	Other Investment Amount		
Default:	₽		
Default Donation:	Donation Limit:		
	5000.00		

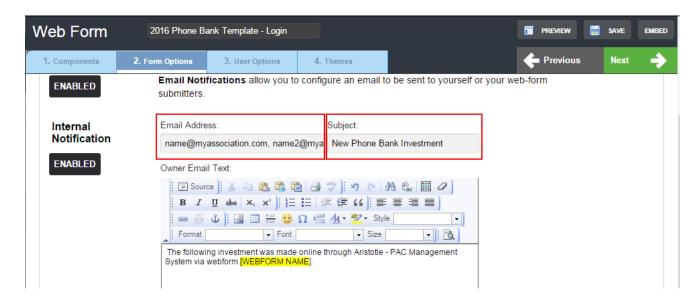
11. Scroll to the top of the webform builder and click the tab for **2. Form Options**.

Web Form	2016 Phone B	ank Template - Login		PREVIEW	SAVE	EMBED
1. Components	2. Form Options	3. User Options	4. Themes		Next	<b>→</b>
Build Your Add form elements from	Form	Credit Card Do	nation			

 Under the Publish/Unpublish section, determine if you want your webform to inactivate prior to 12/31/2016. <u>All investments received on this form will credit Recognition Year 2016</u>. If your state has deadlines prior to 12/31/2016, change the webform End Date to meet your state's need.

Web Form	2016 Phone B	ank Template - Login		PREVIEW	SAVE	EMBED
1. Components	2. Form Options	3. User Options	4. Themes	+ Previous	Next	<b>&gt;</b>
PUBLISH/UNP PUBLISHED	<ul> <li>Forever</li> <li>Start ar</li> <li>St</li> </ul>	r nd End Date tart Date: 08/28/2015 * End Date: 12/31/2016 *				

13. Under the Email Notification Options> Internal Notification section, select the email address of the person(s) at the state/local who want to receive notification of each investment made on the webform. Separate multiple emails with a comma. Change the subject line of the internal email as you wish. In the body of the internal email, update the name of your webform.



15. On the **Form Submitter Confirmation Message** section, prepare the auto-generated email your investor will receive with their receipt information. Fill in the fields for Subject, From Email and From Name (from name can be as simple as Georgia REALTORS<sup>®</sup> or can be the name of a state staff member.) Click Save.

Form Submitter Confirmation Message	Subject: Thank You for RPAC Investment	From email:* name@myassociation.com	From name:
ENABLED	User Email Text: B Z U abe ×, ×' ) : : : : : : : : : : : : : : : : : :	续续代]] 王王王王]	

16. Scroll to the top of the webform builder and click the tab for **3. User Options**. Scroll down to **User Assignments**. Under the field **Assign to Event**, select the Phone Bank Event (the Local Association will have created this already.)

Web Form	2016 Phon	e Bank Template - Login			l	PREVIEW	📙 SAVE	EMBED	
1. Components	2. Form Options	3. User Options	4. Themes			Previous	s Next	<b>→</b>	
USER ASSIGNMENTS									
Assign to		Assign to Pro	gram/Event	/Event					
Category		You can assign a category to your form users							
You can assign category to you		Assign to Program	am: Assign to Event:						
form users		2016 AZ Phone	Banks	•				•	
Group Category:		Assign form-er	ntered						
	•	individuals to p							
Assign to group:		Targets	Participants						
	Ŧ				2				

17. Click Save and click Preview to view your webform. The field of the webform will be blank in "preview mode" however they will auto populate with each target's information when accessed via the phone bank.

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YOUR E	BEST INVESTMENT IN REAL ESTATE
sic Information	
* First Name:	
* Last Name:	
* Street 1:	
* City:	
* State	
* Zip:	
enonal Email	
* NRDS ID	quired Field
edit Card Invest	ment
* Amount (\$):	\$12.00     \$25.00     \$250.00     \$250.00     \$250.00     \$00     Other Investment Amount
* Card Number:	
* Billing First Name	
* Billing Last Name	
* Billing Zip:	