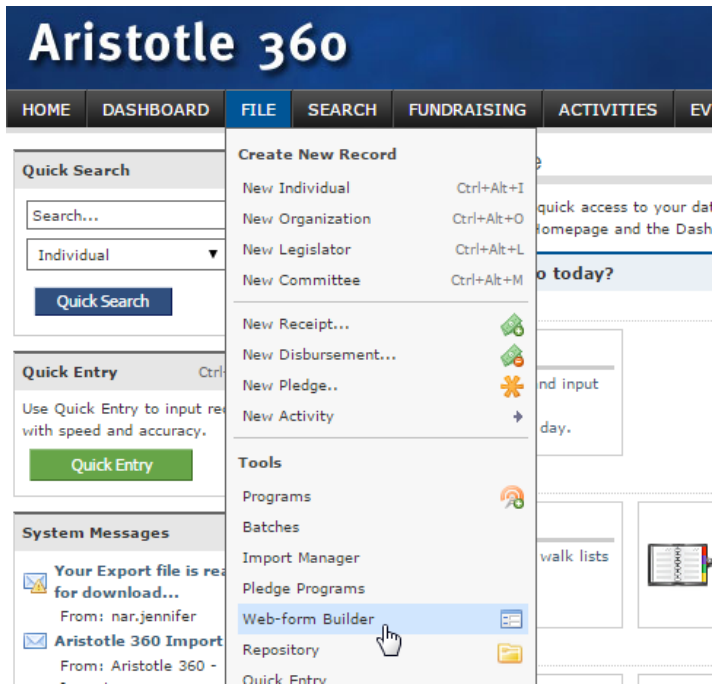
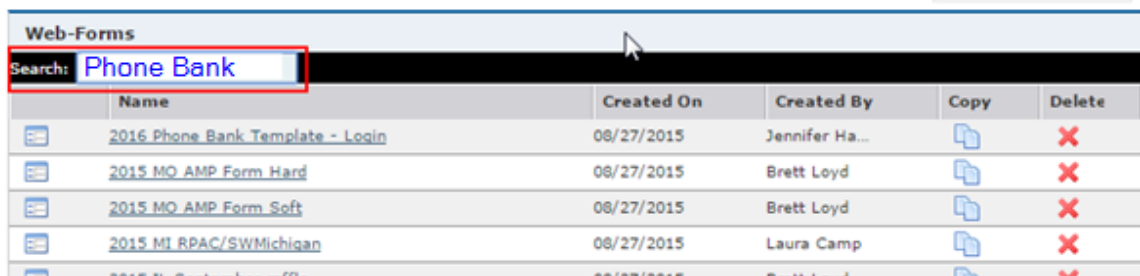


Phone Bank Webforms – One Time Contributions – User Guide

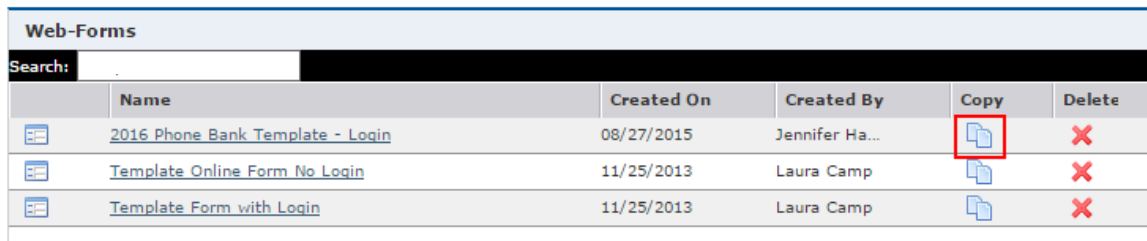
1. To find your state’s phone bank webform template, go to File>Webform Builder.



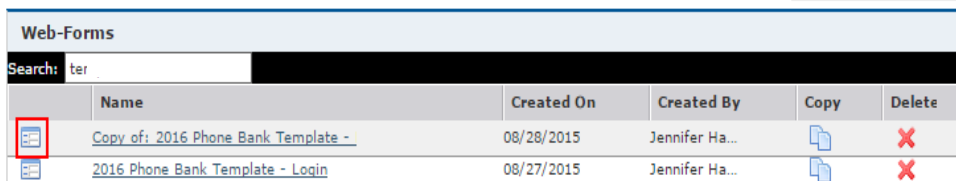
2. Type the word “phone bank” into the webform search field, and click Enter.



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



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



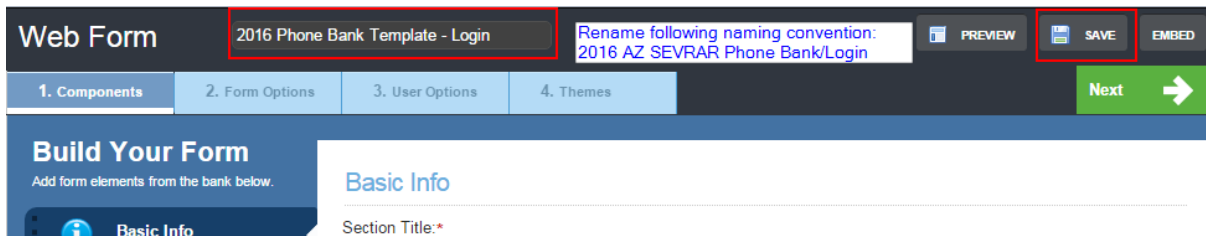
5. You will be taken to the first step of the webform builder. **1. Components.**

Rename the webform according to this naming convention:

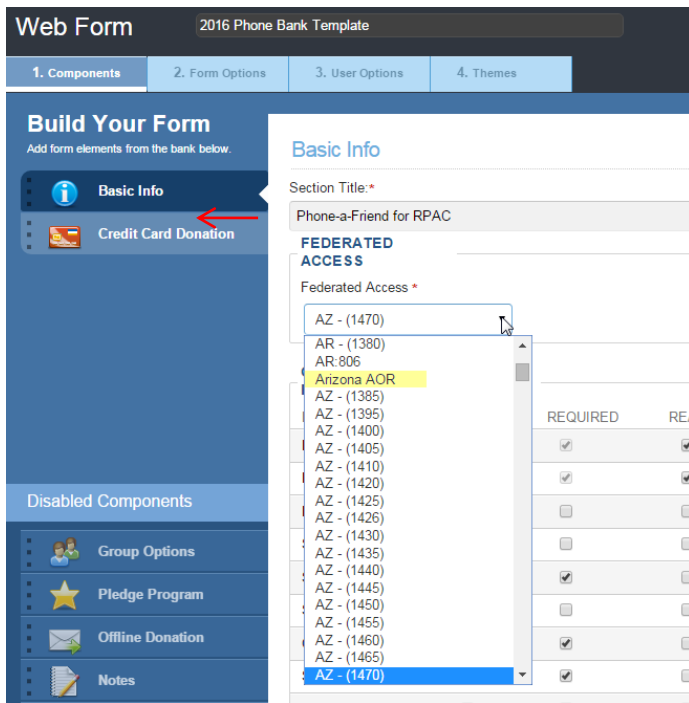
Year – State Abbreviation – Local Name/Abbreviation – Phone Bank

E.g. 2016 AZ SEVRAR Phone Bank

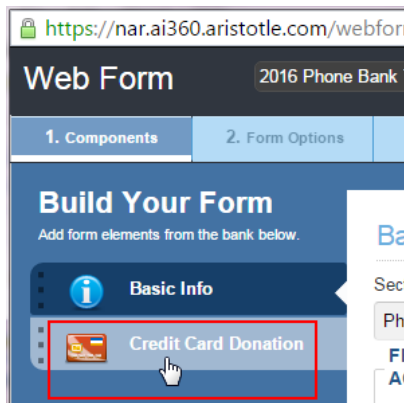
Click Save. Do this frequently.



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.



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.

The screenshot shows the 'DONATION/GIVING LEVELS' section with an 'ENABLED' toggle. The 'Amount (in \$): *' field is empty and highlighted with a red box. The 'Label:' field contains 'Broker Level'. The 'Default:' checkbox is unchecked. The 'Add' button is highlighted with a red box and has a red 'X' next to it. Below the form, a dropdown menu shows '\$15.00 (Default)'.

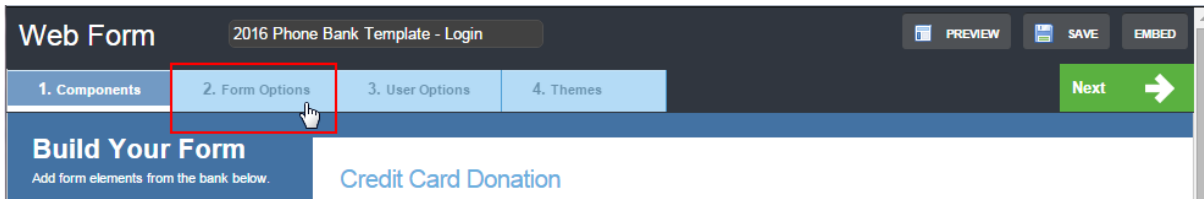
9. To edit or remove an engagement level, click on the amount and click Edit to change the amount or click the red **X** to remove the amount.

The screenshot shows the 'DONATION/GIVING LEVELS' section with an 'ENABLED' toggle. The 'Amount (in \$): *' field contains '15.00'. The 'Label:' field is empty. The 'Default:' checkbox is checked. The 'Edit' button is highlighted with a red box and has a red 'X' next to it. Below the form, a dropdown menu shows '\$15.00 (Default)'.

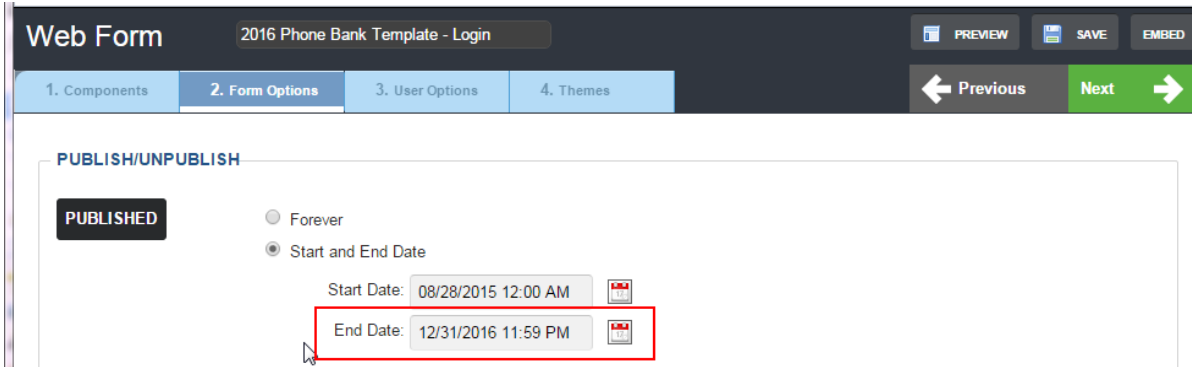
10. To allow investors to select their own engagement level, check the box that says Other Amount. Enter a label for how you want the field to display on your webform. E.g. Other Investment Amount. Click Save.

The screenshot shows the 'DONATION/GIVING LEVELS' section with an 'ENABLED' toggle. The 'Amount (in \$): *' field contains '15.00'. The 'Label:' field is empty. The 'Default:' checkbox is checked. The 'Edit' button is highlighted with a red box and has a red 'X' next to it. Below the form, a dropdown menu shows '\$15.00 (Default)'. The 'Other Amount' checkbox is checked and highlighted with a red box. The 'Label:' field for 'Other Amount' contains 'Please define label here' and 'Other Investment Amount'. The 'Default:' checkbox for 'Other Amount' is unchecked. Below the form, the 'Default Donation:' field is empty and the 'Donation Limit:' field contains '5000.00'.

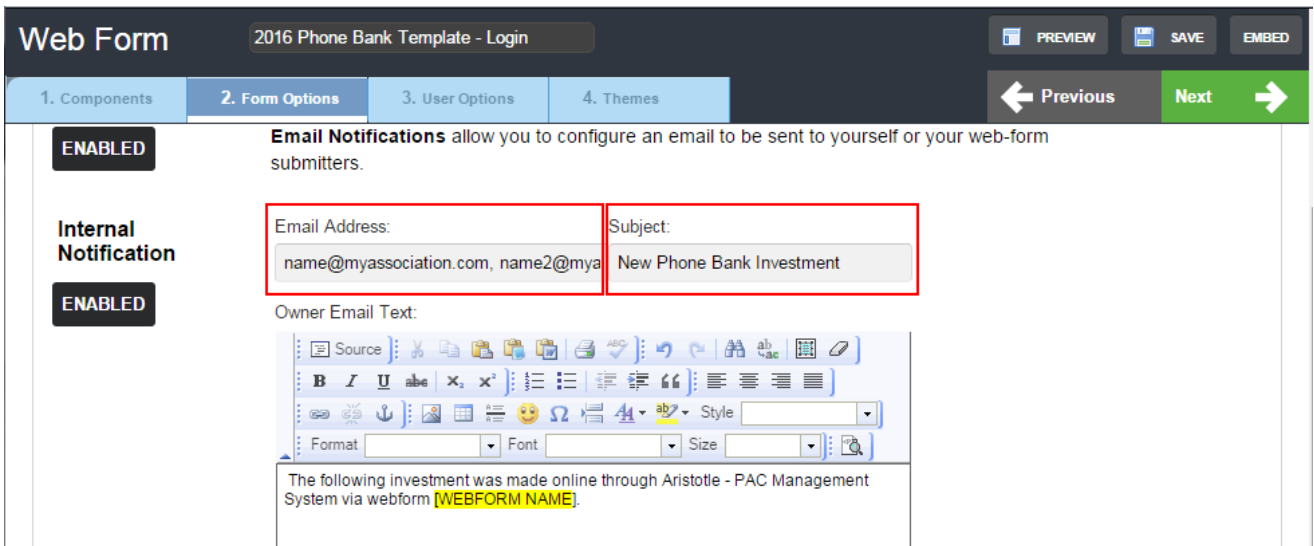
11. Scroll to the top of the webform builder and click the tab for **2. Form Options**.



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



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® or can be the name of a state staff member.) Click Save.

Form Submitter Confirmation Message

ENABLED

Subject: Thank You for RPAC Investment

From email: name@myassociation.com

From name:

User Email Text:

You personalize this message.

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 Phone Bank Template - Login

1. Components 2. Form Options **3. User Options** 4. Themes

PREVIEW SAVE EMBED

← Previous Next →

USER ASSIGNMENTS

Assign to Category

You can assign a category to your form users

Group Category:

Assign to group:

Assign to Program/Event

You can assign a category to your form users

Assign to Program: 2016 AZ Phone Banks

Assign to Event:

Assign form-entered individuals to program as:

Targets Participants

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.

RPAC REALTORS® ASSOCIATION OF ALABAMA
 YOUR BEST INVESTMENT IN REAL ESTATE

Basic Information

* First Name
 * Last Name
 * Street 1
 * City
 * State
 * Zip
 * Personal Email
 * NREID ID

Credit Card Investment

\$15.00
 \$25.00
 \$50.00
 \$250.00
 0.00 Order Investment Amount

* Card Number
 * Billing First Name
 * Billing Last Name
 * Billing Zip
 * Card Expiration Date

I verify this investment is made with a personal credit card and not a corporate credit card.