

Generating Leads with Custom Forms

presented by a la mode

Course Highlights

- ❑ Create and configure your Contacts database for working with Lead Generation
- ❑ Build a library of Lead Capture forms
- ❑ Apply Lead Capture forms to pages in your XSite
- ❑ Configure Doorway forms to control access to particular content

Generating Leads with Custom Forms

Introduction to Generating Leads with Custom Forms

For most people, one of the primary reasons for maintaining a web site is to generate leads from prospective clients. Done right, your XSite can play a major role in your business development strategies. Lead Capture Tools are a valuable asset in helping you execute that strategy.

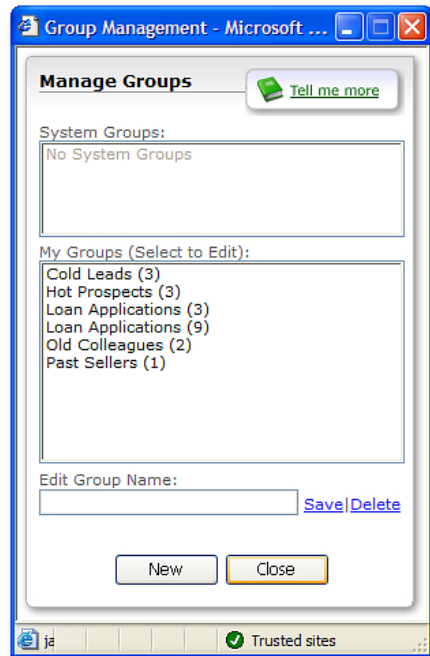
Contacts

Your complete address book can be stored online with Contacts in your XSite and CertMail. Like the rest of your XSite, it only takes a browser to access it. You should find the contacts easy and intuitive to use and also enjoy features like being able to store company information so it doesn't have to be retyped for each contact in one office as well as being able to group contacts into categories you setup yourself.

Groups

When you enter or edit a contact, you're able to assign that contact to groups. This allows you to direct your future marketing campaigns to a whole group of contacts that meet certain criteria. A contact can be a member of several groups, allowing you to fine-tune your marketing efforts for maximum impact.

Groups do not have to be by "occupation." You can use groups to denote new contacts, trainees, hot prospects, or whatever. This



forms the core of your future marketing efforts, so take some time to build groups that make sense for how you do business.

Task: Create a new group

1. From the main toolbar, click the **Contacts** icon.
2. From the Contact Management toolbar, click **Tools**, then click **Group Management**.
3. Type a name for your new group in the **Edit Group Name** text box and click the **Save** link.

Use these steps to add as many groups as you feel necessary. Click Delete to remove groups that are no longer applicable.

Task: Add a contact

1. From the main toolbar, click the **Contacts** icon.
2. Click **Add** and then click **Add Contact** in the drop down menu.
3. The contact information screen is segmented into several sections. Click the header for any section to open it and enter information for your contact:

❑ **Contact Information** – The first section of your contact data includes all the basic name, title and company information. The **Company** field in the **Contact Information** section allows you to select the name of the company for which your contact works. When you select a company name from the list, the contact's business address information is pulled into the record automatically. If no company name is selected, then the business address fields under street addresses is not displayed.

If you need to add a company name on the fly, just click **New** next to the company field, enter the company data, then, click **Save**. Then fill out each of the following sections.

❑ **Type of Contact** – Since your XSite's Contacts module is designed for real estate, we've set up predefined categories for each contact. These help you when searching for specific

Generating Leads with Custom Forms

contacts later. Click the box next to all of the categories which apply to this contact.

- ❑ **Phone Numbers** – Enter all that apply.
- ❑ **Street Addresses** – If you chose a company name under the **Contact Information**, the business address information for that company is displayed here. You can also enter a personal or home address for this contact.
- ❑ **Online Addresses** – Each contact can have up to 3 online (e-mail) addresses. The one you mark as primary is used as the default when composing e-mail.
- ❑ **Groups** - In addition to “Type of Contact” categories, you can also place contacts into “groups” you define yourself. To add a new group, just click **Add**, type a name and click **Save**.

Manage your existing groups by clicking **Manage Groups**. Once you have your groups created, click the check box next to all of the groups that apply to this contact.



- ❑ **Notes** – Once you’ve created and saved a contact, you’re able to create a notes document for that person. Notes can be any data you wish to remember that doesn’t fit readily into any of the standard fields. Birthdays, favorite donut flavors, spouse’s names, you name it.

In addition, you can use the **Notes** field to create a “tickler” that reminds you to do something for this contact. Click **Add** to begin adding your information. At the bottom of the screen, click the **Create a new...** check box, then select an item type from the drop-down. Enter a subject, start time and ending time for this task. Then, select how far in advance of the event you want to be notified and click **Save**. When your event nears, you receive a notification.

- ❑ **Loan Program** – If your contact is an existing customer you can note the Loan Program and details in your contact information in this section.
- ❑ **Licenses and Certification** – If your contact is a member of a professional organization, or holds a particular certification, you can enter that information here. Click **Add**, enter the relevant information and click **Save**.

Once you’ve entered or edited all of your contact’s information, be sure to click **Save** at the bottom of the screen. Or choose **Save** from the menu at the top.

Task: Find a contact

- ❑ Search contacts by entering a search phrase and picking the field you wish to search. Then, click **Find**.
- ❑ Filter the list quickly by last name by clicking a letter in the toolbar.
- ❑ Click **All** to reset your list to show all contacts.
- ❑ You can also filter by group using the **Groups** drop-down at the top right or filter by contact type using the **Types** drop-down.
- ❑ Clicking any of the column headings sorts your contact list by that column. So, if you want to view your contacts sorted by first name instead of last, just click the **First Name** heading.
- ❑ The  icon indicates that the contact has been associated with an XSite user account in your XSite’s User Management.
- ❑ The  icon indicates that the contact is new.

Creating lead capture forms

Once you have your Contacts database properly configured, it’s time to start building your library of Lead Generation forms to apply throughout your XSite.

Task: Create a lead capture form

1. From the **XSite** drop-down menu, click **Lead Capture**.






Generating Leads with Custom Forms

Introduction to Generating Leads with Custom Forms

2. Open the **Form Manager** in the **Lead Tools** menu and click the **Create a Form** button.
3. Enter a name for the form - something like "Request a CMA" or "I'd like a custom rate quote."
4. Below that, you can give instructions or a welcome or something to that effect. You can leave this blank if you wish.
5. Next, you decide which things you want to ask on your form. The default "group" information asks them for their name, e-mail and

The screenshot shows a web interface for creating a lead generation form. At the top, it says "Include a Lead Generation Form" and "Use the fields below to create or edit your own lead capture form." The form is titled "Request a CMA". Below the title is a text area with instructions: "How much is your home worth? If you're considering selling your property, that's the first question you should be asking. And I have the answer. With over 15 years of experience in the Baytown area, I can help you set a price that gives you maximum value in the". Below this are two groups of fields. The first group is "Personal Information" and includes fields for Name, Email, and Phone. The second group is "Property Data" and includes fields for Address, # of Bedrooms, Square footage, and What else?. Each field has a "Their text will go here." placeholder and a set of icons for editing and deleting. At the bottom, there is a checkbox for "Enable Auto Responder" and a "Save" button.

phone number. To add another field, click **Add a field**, and then give it a label.

6. Next to the label is a gray box that shows where their answer will go, and next to that is a paragraph button that will toggle the field between a single line  and multi-line .
7. You also have "groups" of information. Basically, you can break up what you'll be asking your prospects into sections. You might want to name the default group "Basic Contact Information," for example. But, say you're asking someone about their family. You could click **Add a group** to first make a new category, then add fields under that group pertaining to their family.
8. After you've added fields and groups, you can rearrange them:
 - ❑ The up  and down  arrow next to the fields and groups help you arrange them on the form from top to bottom.
 - ❑ The rightmost icon  is used to delete a group or field.
9. Lastly, you can enable an automatic response for your lead generation forms. This essentially lets the sender know that their message went through. Click the box for **Enable Auto Responder** to enable it. You'll also want to personalize the automatic response your prospect gets, so be sure to click **Edit your automated response** and make changes to the standard response form.
10. When you're through creating your custom form, click **Save**.

Task: Add a form to a web page

1. From the **Lead Tools** menu on the **Lead Capture** screen, click **Powerview**.
2. Scroll through the list to find the web page to which you'd like to add a lead capture form, then click the **Edit Settings** link.
3. From the **Embedded Forms** pull-down menu, select any of the forms from your collection of lead generation forms.

Generating Leads with Custom Forms

4. Use the **Contact Group** pull-down menu to indicate in which group in your Contact manager respondents should be added.
5. Click the **Save** link to complete adding the form.

Doorway forms

Doorway forms are simply lead capture forms that your visitors see before they can get to their requested page. These are different from embedded forms that just appear ON a particular page. With a doorway form, your visitors can either fill out the form to continue, or can simply click Cancel to continue (unless you've specified that form is required).

There are two types of triggers that you can enable:

Page View

Page View triggers automatically prompt a prospect to fill out a lead capture form after viewing a specified number of pages in your XSite. Using the **Page View Settings** section, you can determine how many pages you want to permit a prospect to browse before the lead generation form appears, whether you want to require them to fill out the form before browsing the rest of your site, and what types of pages in your XSite you want to include in the page view count. You can even determine how many times the form will reappear before allowing the visitor to continue browsing your site without occasional prompts to fill out a form.

Task: Enable a Page View Trigger

1. Click the **Global Settings** link in the **Lead Tools** menu.
2. Check the Activate the page counter trigger check box.
3. Determine how many pages you want to allow prospects to visit before prompting them to fill out a lead generation form and type the desired number in the available text box.
4. Choose a lead generation form to display after visitors trip the lead trigger from the drop-down menu on the right.

5. Next, choose a contact group that you would like their contact information to insert their contact information into from the drop-down menu on the right.
6. Determine if you want to require your visitors to fill out the form before allowing them to continue browsing through your site or

Doorway Forms - Global Settings

The following settings allow you to establish "triggers", which automatically activate doorway forms you choose through the natural course of a visitor browsing your site.

Page View Settings

Leads from this form Last 30 Days : 0

Activate the page counter trigger

Every pages, show the following lead capture form: --No Form Selected--

Submit these leads to the following contact group: --No Group Selected--

Require the visitor to complete the form in order to proceed.

Until the visitor fills out this form, show it only a maximum of times.

Pages to count

Include content pages in page count.

Include listing pages in page count.

Listing Detail Trigger

Leads from this form Last 30 Days : 0

Activate the listing detail trigger

Allow visitors to view my listing directory pages, but when requesting a listing detail page, show the following lead capture form: --No Form Selected--

Submit these leads to the following contact group: --No Group Selected--

Require the visitor to complete the form in order to proceed.

Until the visitor fills out this form, show it only a maximum of times.

Save

Generating Leads with Custom Forms

choose the number of times the form will reappear before allowing your visitors to continue browsing the site uninterrupted and check the corresponding boxes to activate your desire setup.

7. Finally, in the **Pages to count** section, choose whether you want to include content pages, listings pages, or both in the page count that will trip the **Page View trigger** and indicate your choice by checking the corresponding boxes.
8. Be sure to click **Save** to apply your changes.

Listing Detail

Listing Detail triggers automatically prompt a visitor to fill out a lead capture form after requesting to view additional details on any listing within your site. As with **Page View triggers**, using the **Listings Detail Trigger** section you can determine whether you want to require the visitor to fill out the form before continuing to the listing detail page and how many listings detail requests cause the form to appear before your visitors are free to continue browsing the site without occasional appearances by lead capture forms.

Task: Enable a Listing Detail Trigger

1. Click the **Global Settings** link in the **Lead Tools** menu.
2. Check the Activate the listing detail trigger check box.
3. Choose a lead generation form to display after visitors trip the lead trigger from the drop-down menu on the right.
4. Next, choose a contact group that you would like their contact information to insert their contact information into from the drop-down menu on the right.
5. Finally, determine if you want to require your visitors to fill out the form before allowing them to continue browsing through your site or choose the number of times the form will reappear before allowing your visitors to continue browsing the site uninterrupted and check the corresponding boxes to activate your desire setup.

6. Be sure to click **Save** to apply your changes.

Doorway Forms on Pages

In addition to the global doorway forms, you can also apply a doorway form to a specific web page. Site visitors who click on a link to that page are prompted to fill out a form before they can view that page. As with the other settings, you can specify whether completing the form is mandatory.

Task: Enable a doorway form on a page

1. Click the **Page Settings** link in the **Lead Tools** menu.
2. Scroll through the list to find the web page to which you'd like to add a doorway form.
3. From the pull-down menu in the **Doorway Form** column, select any of the forms from your collection of lead generation forms.
4. Use the pull-down menu in the **Contact Group** column to indicate in which group in your Contact manager respondents should be added.
5. Click the check box in between the two columns to indicate that this doorway form is required.