

CampusLogin | Leads

Creating/Implementing Forms Manual

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Administration Training Manual

1. **Accessing the Form Generator**
 - a. To access the form generator admin tool select the “Leads” tab at the top of the page
 - b. Then select the “Settings” sub tab
 - c. Once on the settings page select the “Forms” admin tool
2. **Setting Your Default Style Guide**
 - a. The first tab in the form generator is called “Form Style”
 - b. Here you can enter your style guide (font, size, colours, alignment, submit button style)
 - c. Your default style guide will be used when creating all new forms
 - d. You are able to customize the form style on a form by form basis as well
3. **Form Functionality - General**
 - a. You can click each tab to access the form generator for each type of available forms
 - b. Once there you can create unlimited forms in each category by clicking the “Create New Form” button
 - c. You will see all of the fields on your lead profile in the left side of the page, under the heading “Available Fields”
 - d. You can then drag the fields you would like on your form by simply selecting the field and dragging it over to the right column, under the heading “Form Preview”
 - e. There you can design your form, by selecting the desired fields and the field order
 - f. If you wish to create a new custom field you can click the “Create/Edit Fields” button at the bottom of the “Available Fields” list

- g. Once all of the fields are on your form you can click the “Save” button at the bottom of the page to save your form and generate a form url
- h. You can click the gear icon beside each field to change the label of the field and/or to make the field mandatory on the form
- i. Please note all forms require the opt in statement to be on the form. This is one of the fields in the available fields list
- j. The opt in can support phone calls, text messages and emails. You can either have a checkbox on your form, or customize the setting to remove the check box and automatically opt people in who fill out the form (if you have an opt in statement on your website)

4. Lead Form Features

- a. To access the Lead form functionality, select the “Lead Form” tab in the form generator
- b. Lead Forms are available for leads to request more information
- c. You are able to create multiple lead forms if you would like a short form, long form, horizontal form, etc.
- d. You are able to create forms for special events or landing pages, and set the media value as that media source

5. Book a Tour Form Features

- a. To access the Book a Tour form functionality, select the “Book a Tour” tab in the form generator
- b. With the book a tour form you design the form you would like with the desired fields, just like the lead form
- c. In the “Form Settings” section of the book a tour tab you will see an extra field called “The “Stage” Field:”
- d. With “The “Stage” Field:” you can select which stage in your admissions process the book a tour form should be associated to (for most schools this stage is called Tour, Interview, Appointment, etc.
- e. Leads will then be able to book tours right off of your website
- f. After the form is filled out, the lead will be directed to a calendar (the calendar of the recruiter the lead is assigned to) where the lead can actually book a tour on the recruiter’s calendar
- g. Leads will only see available times and will not see the details of booked appointment
- h. You are able to create unlimited book a tour forms if you would like to book appointments for other stages, such as Financial Aid appointments, etc.

6. Open House Form Features

- a. To access the Open House form functionality, select the “Open House” tab in the form generator
- b. You are able to design the form you would like for leads to RSVP for open houses
- c. In the “Form Settings” section of the open house tab you will see an extra field called “Open House:”

- d. This field will list all of your open houses that have been created in the Open House admin tool (to access this tool click the “Leads tab” at the top of the page and then select “Manage Open Houses” on the left navigation
- e. You can then associate your form to a specific open house/event. Or you can select “Ask on Form”. When this is selected all future open houses will automatically be listed on the form
- f. Leads can then RSVP for your open houses/events. And in the “Manage Open Houses” admin tool you can see the RSVP List and take attendance

7. Tablet Form Features

- a. To access the Tablet form functionality, select the “Tablet” tab in the form generator
- b. Tablet forms are used for any in-person scenarios where the lead will fill out the tablet form
- c. This can be used for walk-ins to the school as well as any events the school attends, such as Career Fairs, High School Presentations, etc.

8. Tracking Media Campaigns (Web and In-Person)

- a. All forms have the ability to ask the lead “How Did You Hear About Us?”. The media field is a two tiered drop down (media category and then the specific media source) and can be added to your forms from the “Available Fields” list
- b. You do not have to ask for media on your form if you do want (however this is encouraged as a best practice)
- c. You are also able to pre-set the media on the form, and not ask the lead. So if you are designing a form for a landing page, or a tablet form for an event, in the “Form Settings” section you will see a field called “The “How Did You Hear About Us” Field:”
- d. Here you can pre-set your form to a specific media source instead of asking the lead
- e. For example, you could setup a tablet form on your website accessible at www.yoururl.com/tablet
- f. You could then pre-set that form to the event you are attending
- g. Everyone who fills out the form will automatically be associated to that event
- h. Then when you are going to another event, you can modify your form and change the media to that event
- i. Then leads will automatically be associated to that event, without having to modify the form, or your website url

9. Online Application Features

- a. To access the Online Application form functionality, select the “Online Application” tab in the form generator
- b. Online Applications are used for the lead to begin the application process
- c. In the “Form Settings” section of the online application tab you will see an extra field called “Application Stage:” field
- d. Here you can associated your online application to the application stage in your admissions process (this is usually called Application, Applicant, Application Submitted, etc)

- e. In the “Form Settings” section of the online application tab you will see an extra field called “Security Settings:” field
- f. You can either select Open Form, which will allow leads to simply fill out your online application form
- g. Or Username/Password protected, which will require them to login with their username and password (these fields are on your lead profile and can be inserted into templates to give the lead access)
- h. This will allow the lead to begin the application process and save and continue later
- i. The application form (and all forms) allow you to drag the Document Upload field to the form. Allowing leads to also upload and submit required documents, such as a High School Transcript, etc.

10. Implementing Your Form on your Website/Landing Pages

- a. Once you save your form a form url will be generated
- b. You can then add that form to your website via an iframe
- c. For detailed instructions please visit:
http://www.campuslogin.com/w_setting_up_an_iframe.aspx
- d. All forms are responsive and transparent, so you can add your own background colours or images, and the forms will automatically scale to the size of the page

11. Setting Up Thank You Pages/Conversion Tracking

- a. In the “Form Settings” section of each form you will see a field called “Thank You Page URL:”
- b. Here you can enter the url users should go to after filling out your form
- c. After the form is submitted the user will be directed to your url
- d. You can put any tracking code/pixels on your thank you page
- e. If you do not enter a thank you page url the form will automatically refresh after it is submitted (this feature is also good for tablet forms, if you are at an event and someone fills out the form)
- f. You are also able to put the thank you page url in your actual form. Instead of using the thank you page field available in the form generator. All you have to do is add the thank you page into the form url like this: &thankyouurl=
- g. This will direct the user to the appropriate thank you page and allow you to easily control the thank you page, and use many different thank you pages for the same form
- h. For more detailed instructions on setting up a thank you page this way please visit:
http://www.campuslogin.com/w_thank_you_page_instructions.aspx