



⊕ New ▼

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

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- Dashboard
- Contacts
- Campaigns
- Automation
- Reports
- Properties
- Events

▼

[Automation Workflow name] ✎ [edit](#)

Start this workflow when:

[triggers]

▼

☰

1st Action

[actions]

▼

⊕ [Add another action](#)

Stop this workflow when: (Optional)

[triggers]

▼



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- Properties
- Events

▼

[Automation Workflow name] [edit](#)

Start this workflow when:

A form is submitted ▼

[existing forms] ▼

or [+ Create new form](#)

☰

1st Action

[actions] ▼

[+ Add another action](#)

Stop this workflow when: (Optional)

[triggers] ▼



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▼

[Automation Workflow name] [edit](#)

Start this workflow when:

A form is submitted ▼

Austin Relocation Guide ▼

or [+ Create new form](#)

1st Action

[actions] ▼

[+ Add another action](#)

Stop this workflow when: (Optional)

[triggers] ▼



[+ New](#) ▼

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- Events

▼

[Automation Workflow name] [✎ edit](#)

Start this workflow when:

A form is submitted ▼

Austin Relocation Guide ▼

or [+ Create new form](#)

☰

1st Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or [+ Create new email](#)

[+ Add actions to links](#)

[+ Add another action](#)

Stop this workflow when: (Optional)

[triggers] ▼



+ New ▼

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Created on 3/24/2012 by System
Modified on 8/21/2012 by Donna Ream

▼

[Automation Workflow name] ✎ [edit](#)

Start this workflow when:

A form is submitted ▼

Austin Relocation Guide ▼

or

[+ Create new form](#)

☰ 1st Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or

[+ Create new email](#)

[+ Add actions to links](#)

☰ 2nd Action Schedule 14 days and run on any day at 9:30am. 🗑

Set a timer ▼

Set timer based on a:

☒ Time delay

☐ Date

☐ Contact field

Wait at least:

14

days ▼

Run on:

☒ Any day

☐ Weekdays

Run at:

9:30 am

[+ Add another action](#)

Stop this workflow when: (Optional)

[triggers] ▼



+ New ▼

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▼

[Automation Workflow name] [edit](#)

Start this workflow when:

A form is submitted ▼

Austin Relocation Guide ▼

or

+ [Create new form](#)

1st Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or

+ [Create new email](#)

+ [Add actions to links](#)

2nd Action

Set a timer ▼

Set timer based on a:

☒ Time delay

☐ Date

☐ Contact field

Wait at least:

14

days ▼

Run on:

☒ Any day

☐ Weekdays

Run at:

9:30 am

3rd Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or

+ [Create new email](#)

+ [Add actions to links](#)

+ [Add another action](#)

Stop this workflow when: (Optional)

[triggers] ▼



+ New ▼

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

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▼

[Automation Workflow name] [edit](#)

Start this workflow when:

A form is submitted ▼

Austin Relocation Guide ▼

or [+ Create new form](#)

1st Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or [+ Create new email](#)

[+ Add actions to links](#)

2nd Action

Set a timer ▼

Set timer based on a:

☒ Time delay

☐ Date

☐ Contact field

Wait at least:

14

days ▼

Run on:

☒ Any day

☐ Weekdays

Run at:

9:30 am

3rd Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or [+ Create new email](#)

Select link(s):

☐ Link Text #1

Link URL

☐ Link Text #2

Link URL

☐ Link Text #3

Link URL

☐ Link Text #4

Link URL

☐ Link Text #5

Link URL

Action

[actions] ▼

[+ Add another action](#)

Stop this workflow when: (Optional)

[triggers] ▼



+ New ▼

🔍 Search contacts, opportunities, campaigns, etc. [Advanced](#) ✕

[Recent Activity](#) | [Messages](#) | [Settings](#)

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▼

[Automation Workflow name] [edit](#)

Start this workflow when:

A form is submitted ▼

Austin Relocation Guide ▼

or [+ Create new form](#)

1st Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or [+ Create new email](#)

[+ Add actions to links](#)

2nd Action

Set a timer ▼

Set timer based on a:

☒ Time delay

☐ Date

☐ Contact field

Wait at least:

14

days ▼

Run on:

☒ Any day

☐ Weekdays

Run at:

9:30 am

3rd Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or [+ Create new email](#)

Select link(s):

☒ Link Text #1

Link URL

☐ Link Text #2

Link URL

☒ Link Text #3

Link URL

☒ Link Text #4

Link URL

☐ Link Text #5

Link URL

Action

Adjust Lead Score ▼

Adjust Lead Score by:

100

points

Save Workflow Rule

[+ Add another action](#)

Stop this workflow when: (Optional)

[triggers] ▼



Dashboard

Contacts

Campaigns

Automation

Reports

Properties

Events

Created on 3/24/2012 by System
Modified on 8/21/2012 by Donna Ream

▼

[Automation Workflow name] ✎ [edit](#)

Start this workflow when:

A form is submitted ▼

Austin Relocation Guide ▼

or [+ Create new form](#)



1st Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or [+ Create new email](#)

[+ Add actions to links](#)



2nd Action

Set a timer ▼

Set timer based on a:

☒ Time delay

☐ Date

☐ Contact field

Wait at least:

14

days ▼

Run on:

☒ Any day

☐ Weekdays

Run at:

9:30 am



3rd Action

Send an email ▼

Austin Relo Guide - About Austin ▼

or [+ Create new email](#)

Select link(s):



Link Text #1

Link URL



Link Text #2

Link URL



Link Text #3

Link URL



Link Text #4

Link URL



Link Text #5

Link URL

Action

Adjust Lead Score ▼

Adjust Lead Score by:

100

points

Save Workflow Rule



[+ Add another action](#)

Stop this workflow when: (Optional)

[triggers] ▼



New ▾

Search contacts, opportunities, campaigns, etc.

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Created on 3/24/2012 by System
Modified on 8/21/2012 by Donna Ream

▼

[Automation Workflow name] [edit](#)

Start this workflow when:

A form is submitted ▼

[list of existing forms] ▼

or [Create new form](#)

Allow users to select one, several, or all forms.

Start this workflow when:

The Lifecycle Stage changes to ▼

[list of Lifecycle Stages] ▼

Start this workflow when:

Any of these tags are applied ▼

Note: Users may create tags using the existing pattern

Start this workflow when:

A page is visited ▼

Page's URL: ☒ equals ☐ contains

http://

Note: Include "http://" as default text.

Start this workflow when:

Lead Score equals or exceeds ▼

Start this workflow when:

A community is toured ▼

[list of communities] ▼

Allow users to select one, several, or all communities.

Stop this workflow when:

A link is clicked ▼

[list of links in this workflow] ▼

Note: Clicking a link is a stop condition--it does not start a workflow.

Dropdown list should include link text (or alt text for linked images) and the URL.

Dashboard

Contacts

Campaigns

Automation

Reports

Properties

Events

Created on 3/24/2012 by System

Modified on 8/21/2012 by Donna Ream

[Automation Workflow name]

edit

1st Action

Send an email

Existing emails:

[list of existing emails]

or

Create new email

Add actions to links

1st Action

Set a timer

Note: Timer based on a time delay.

Set timer based on a:

Time delay

Date

Contact field

Wait at least:

14

days

Run on:

Any day

Weekdays

Run at:

9:30 am

1st Action

Set a timer

Note: Timer based on a date

Set timer based on a:

Time delay

Date

Contact field

Run on:

a date

between dates

4/22/2012

Run at:

9:30 am

1st Action

Set a timer

Note: Timer based on a range of dates

Set timer based on a:

Time delay

Date

Contact field

Run on:

a date

between dates

4/22/2014

to

4/25/2014

Run at:

9:30 am

1st Action

Set a timer

Note: Timer based on a Contact field

Set timer based on a:

Time delay

Date

Contact field

Wait until:

14

days

Wait until:

[list of contact's date fields]

Run at:

9:30 am

1st Action

Add a tag

Tag(s) to add:

Note: Users may create tags using the existing pattern

1st Action

Remove a tag

Tag(s) to remove:

1st Action

Adjust Lead Score

Lead Score points:

1st Action

Change Lifecycle

Lifecycle stages:

[list of Lifecycle stages]

1st Action

Update a contact field

Contact fields:

[list of Contact fields]

Updated field value:

'Updated field value' shall be field appropriate. If a date field is selected, then provide date option. If a text string is selected, then provide a textbox. Etc.

1st Action

Assign Contact to a User

Users:

[list of Users]

We could also use a textbox and autofill as the user types.

1st Action

Assign Contact to a User

Users:

[list of Users]

Note: If we allow a round-robin distribution, then we may want to add that as an option here.

1st Action

Assign Contact to a User

Users:

[list of Users]

We could also use a textbox and autofill as the user types.

1st Action

Notify User or Group

Users and/or Groups:

Notify by:

Email

Text message

Both email & text

Notify Account Executive

Consider allow User to input 'Account Executive' as an option in the textbox or textarea.

1st Action

Add a task

Attempt to follow the pattern already established when adding a task.

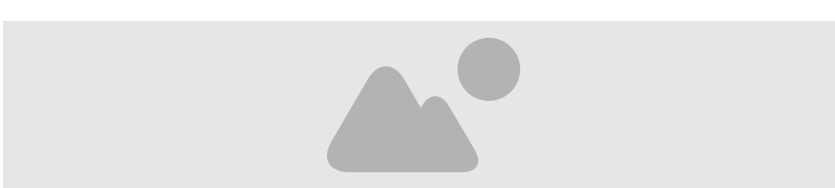
1st Action

Send a text message

Text message:

160 characters remaining

Limiting to 160 characters is not required if we use Twilio; however, it is good practice. After all, SMS means short message service



⊕ New ▼

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Dashboard

Contacts


Campaigns

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 Back

Save Form

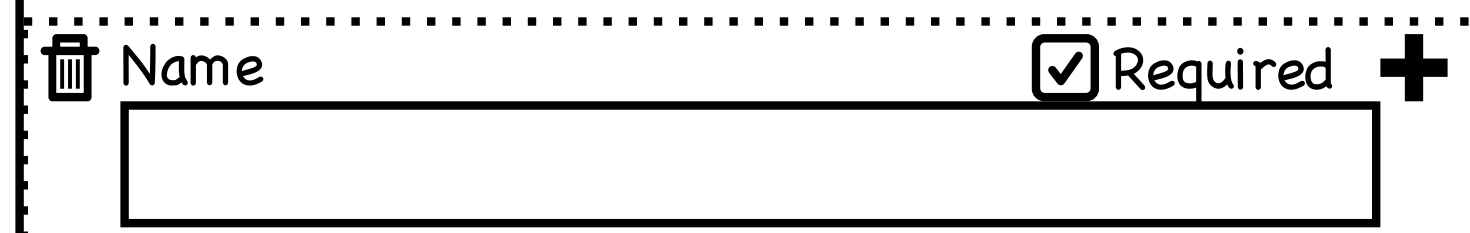
Get Code

Form name  [edit](#)



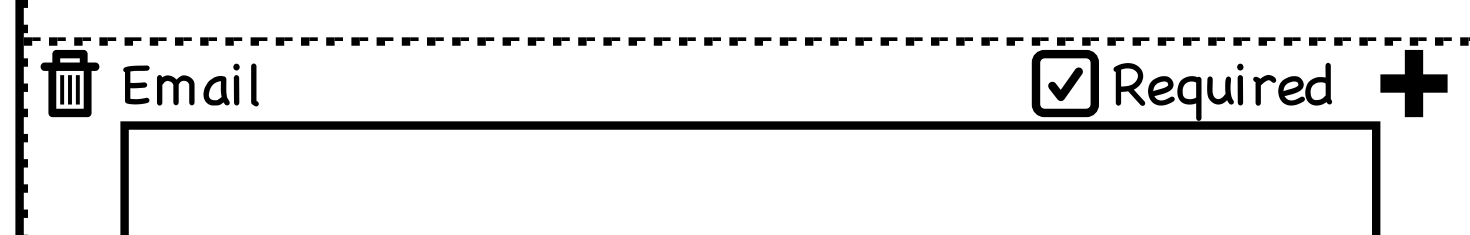
Form Title
Pre-form text

.....

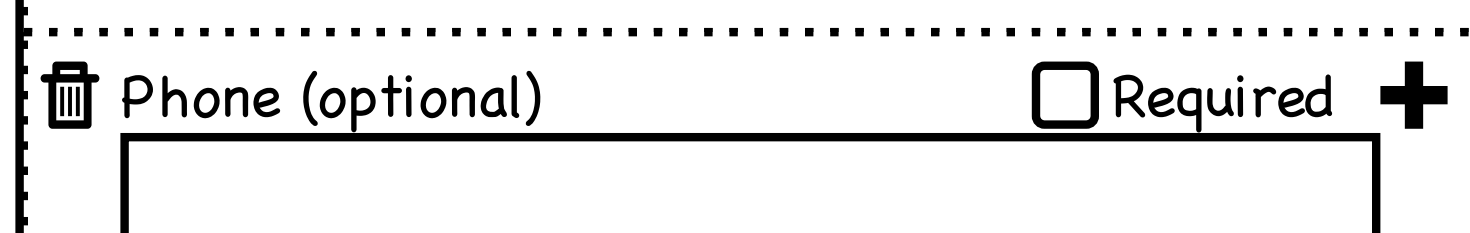


--









--





.....
[]

Send me info

Upon selecting 'Edit' adjacent to campaign name
Fields added by selecting checkbox in list.

Fields draggable on form by handle (plus sign on right-side)
Fields removed by selecting trash icon on left side.

Expand form as fields are added
Indicate required fields by checkbox

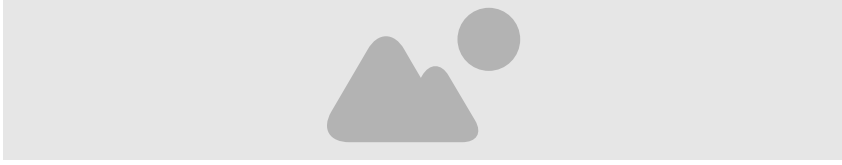
Thank-you page:

http://

http://

http://

If left blank, direct to ?



+ New ▼

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Created on 3/24/2012 by System

⬅ Back Save Form Get Code

Link to hosted form:
<http://forms.smarttouchrcm.com/F94kf> 📄 [Copy to clipboard](#)
(Copy & paste in an email, on your website, or anywhere your audience hangs out.)

Copy & paste code to your website:
[JavaScript Snippet](#) **HTML** [Unstyled HTML](#)

Using the Javascript Snippet allows you to make changes here and have those changes automatically update wherever the form is used.

Paste the following code anywhere between the HTML body tags of the page where you want this form:

```
script type="text/javascript"
src="https://gjl17.infusionsoft.com/app/form/iframe/2969da2278545e6d05cbbb9254605542">script
```

Verbiage for HTML:

Using the HTML code gives you the most control over how the form looks on your site, but changes made here will not automatically update wherever the form is used.

Paste the following code anywhere between the HTML body tags on your web page:

Fields ▼

🔍 Search fields ✖

<input checked="" type="checkbox"/>	Email
<input checked="" type="checkbox"/>	Name
<input checked="" type="checkbox"/>	Phone
<input type="checkbox"/>	Field
<input type="checkbox"/>	Field
<input type="checkbox"/>	Field
<input type="checkbox"/>	Field
<input type="checkbox"/>	Field
<input type="checkbox"/>	Field
<input type="checkbox"/>	Field
Theme ▼	

Form name [✎ edit](#)

Form Title

Pre-form text

🗑

Name

☒ Required

+

🗑

Email

☒ Required

+

🗑

Phone (optional)

☐ Required

+

Any valid format is acceptable

Send me info

Post-form text

Load default form designed for best-practices

Upon selecting 'Edit' adjacent to campaign name, provide textbox and save button

Fields added by selecting checkbox in list.

Fields draggable on form by handle (plus sign on right-side)

Fields removed by selecting trash icon on left side.

Expand form as fields are added

Indicate required fields by checkbox

Thank-you page:

Fields

Q

Search fields

X

☒

Email

☒

Name

☒

Phone

☐

Field

☐

Field

☐

Field

☐

Field

☐

Field

☐

Field

☐

Field

▲

▼

Theme

Theme

▼

Outer background

FFFFFF

▼

Border style

Thin

▼

Border color

000000

▼

Inner background

FFFFFF

▼

Pre-header background

FFFFFF

▼

Header background

FFFFFF

▼

Body background

FFFFFF

▼

Footer background

FFFFFF

▼

+

Save theme



+ New ▼

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Filter ▼

Submissions ▼

e

Edit

View

Copy

Tag

Archive



Form name

Filter on?



Rockport pre-registration form

Select name to edit form



Monthly newsletter

Select number of submissions to view submissions

215 Submissions



 New 

 Search contacts, opportunities, campaigns, etc.

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Filter 

Submissions 

 Edit

View

Copy

Tag

Archive



Form name

Show submissions

Download submissions



Rockport pre-registration form



Monthly newsletter

215 Submissions