BTWebKit - Prospect Form Implementation Guide

Revised December 4, 2008

Note to Users:

This document is written for the person integrating the code generated from the BT application and assumes a level of technical knowledge regarding HTML.

Description

The prospect form wizard generates the html code that can be added to the company's website to allow prospect data to automatically be added into the BuildTopia application. Different html code needs to be generated for each project to be included in the builder's website. The reason for this is that the survey question data is unique per project. An optional process is to put all prospects into a single project and then manually enter the prospect data into the specific project.

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Notes:

- Once the wizard is complete – the BuildTopia user may re-run the wizard at any future date to make changes. Information from the most recently completed wizard is saved and is visible when the wizard is opened.
- The following changes can be made within this form by the user WITHOUT generating new HTML code for the Web Master:
    - Associated Sales Rep
    - Prospect Type Code assigned to WIK Prospects
    - Multiple Email Notification addresses
- With any OTHER changes made via the wizard, the user must forward the newly-generated HTML code to the webmaster.
- The user's webmaster may edit the HTML code for style elements, such as color, font, background. Text may also be edited. Other parts of the HTML code, including input names, should not be edited, as this prevents correct and accurate data transmission.
- The wizard must be run separately for each project, as the survey information and the prospect data is unique to each project.
- If survey questions are removed from the WIK form in the application and not on the website, the application will ignore answers for those questions. If new questions are added, users will need to post the new code on their website.

Implementation Steps

Tasks	Steps
Generate HTML Code	***Navigation Path*** Project Setup > Setup > Generate BTWebkit Prospect Form

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Integrate the Generated HTML Code into Website Back to Top	**Notes** Copy the code generated by the BuildTopia application and paste it into the builder's website. IMPORTANT: The HTML code can be modified and styled to fit the look and feel of the builder's website. However, input names and JavaScript must be maintained. If the JavaScript or input names are altered the data will not be transferred correctly, and the builder could lose valuable prospects and leads.
Processing Leads and Prospects Back to Top	**Navigation Path** SR > Prospects > New WIK Prospects **Notes** After successfully integrating the generated html code from step one above, into the Builder's website, leads and prospects will begin to appear in the application. These new prospects can be found within the Sales Rep module and the "New WIK Prospects" link.

Common Problems and Mistakes

Changing Input Names

Input names are an integral part of the code generated by BuildTopia. They are essentially the mapping between the user's website and the BuildTopia application. These input names direct exactly where each piece of data is placed within the database, and if they are modified at all it will cause errors when prospects are submitted.

Not Saving Data

At the end of the Prospect Form Wizard, HTML code is generated. After copying this HTML code into the website, please do not forget to click on the "Save" button. If this button is not clicked, the setup is not saved. If the setup is not saved, when a prospect is submitted they will receive an error page. In essence, when modifying code in the application, the user has to make sure modifications are applied to both the database and their website.

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Troubleshooting and Testing Techniques

There are two options for troubleshooting:

Option 1- Regenerate the code out of the application:

This option can be used for general testing prior to integrating into the company's website.

How to test:

1. Complete the BTWebKit wizard and copy the code into text pad, word pad, or note pad. Do NOT use Microsoft Word.
2. Change file type to "all"
3. Save with a ".html" extension
4. Open the file using a web browser. Your browser should open by default when double clicking the file.

Option 2- Copy the code from the customers site:

This option can be used if the prospect filling out the form receives a BuildTopia error.

IMPORTANT: If using option 2 make sure you modify the submit URL to point to training. Also the prospect import process will have to have been set up for over a week so the settings will have flown down to training.

1. View the source of the customers website.
2. Copy and paste the code from the customers website into text pad, word pad, or note pad. Do NOT use Microsoft Word.
3. Change file type to "all"
4. Save with a ".html" extension
5. Open the file using a web browser. This should default when double clicking the file.
6. Things to look for when reviewing the code;
   - JavaScript
   - Form Field Names
   - If from the customer's site make sure the Prospect Import process was completed.

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