



# REVINATE

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## WEBSITE FORM-ENHANCED LEAD MANAGEMENT (ELM) SYSTEM INTEGRATION

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# Website Form-Enhanced Lead Management (ELM) System Integration

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# Website Form-Enhanced Lead Management (ELM) System Integration

## Introduction

Website forms that collect lead generating information can be integrated with the Revinate Reservation Sales Suite Enhanced Lead Management (ELM) module. This will allow website users to make direct inquiries to reservation agents through website form submissions. While this document includes some example HTML that can be used, Revinate does not provide the coding or a widget/module to include the form on your website. Typically, the form HTML will have to be written or a 3<sup>rd</sup> party form product will have to be modified to send data to one of the Revinate API's noted in this document.

## Expected Result

A website visitor will fill out a form on the website that will create an entry in the Enhanced Lead Management (ELM) system that can immediately be acted on by an agent. This will allow you to centrally manage leads from multiple sources and view the email conversations the agents are having with leads.

## Where to Implement

Website forms that generate leads or whose submission should be acted on promptly by the reservation agents should be updated to integrate with the ELM system. Contact Us, Unit Details request and RFP forms are the type most often integrated in this fashion but this can also include any form on the website that submits information that should be received by reservation agents.

## What to Implement

A new form can be created or a previous one updated to integrate with Revinate through web services or a direct form submission. The form below is one example of the types of data that can be collected:

We would like the opportunity to provide you with more information. Please fill in the simple form below, select the **Submit** button, and we will get back to you shortly.

First Name:

Last Name:

Email:

Home Phone:

Work Phone:

Cell Phone:

Address 1:

Address 2:

City:

State: [State]

Zip:

Country: [Country]

If multiple forms are submitting to the ELM it is strongly recommended that you use the web service method as the form submission method is limited to one landing page per account.

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### XML Web Service Method

The Revinate web service is located at

<https://www.navistechnologies.info/webservices/Narrowcast/Narrowcast.asmx> and there are two choices in web service methods available depending on the type of data submitted by the form:

AddWebContact (Basic submission):

<https://www.navistechnologies.info/webservices/Narrowcast/Narrowcast.asmx?op=AddWebContact>

AddEnhancedWebContact (Includes additional fields):

<https://www.navistechnologies.info/webservices/Narrowcast/Narrowcast.asmx?op=AddEnhancedWebContact>

A formal declaration of the web service methods for this API can be found at

<https://www.navistechnologies.info/webservices/Narrowcast/Narrowcast.asmx?WSDL>

Submissions to the web service must follow the requirements outlined in the service definitions above as well as the following:

- The Account and Password fields are required and will be provided by Revinate
- The remaining string fields are optional
- Integer fields (Adults/Children/Nights) must be set to 0 if no data is supplied
- The ReasonForStay field is a lookup field that requires only certain values be submitted. By default, these values are (no quotes) "Narrowcast", "Account Settings", "ELM", or "Reasons for Stay". If you are unsure what to use submit with a value of "ELM"
- The Keyword value should be sent based on the **Keyword submission** section below

### Form Submission Method

Forms can submit through a GET or POST to Revinate at

<https://www.navistechnologies.info/Narrowcast2005/ELM/ELMContactPost.aspx>

Data sent to Revinate must follow the naming conventions and data type requirements outlined below:

Variable Name	Data type	Max Length	Notes
Account	String	11	Required Field provided by NAVIS
FirstName	String	25	
LastName	String	25	
Address1	String	50	
Address2	String	50	
City	String	25	

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Variable Name	Data type	Max Length	Notes
State	String	2	
ZipCode	String	10	
Country	String	50	
HomePhone	String	20	
WorkPhone	String	20	
CellPhone	String	20	
EmailAddress	String	100	
Subject	String	200	You should note where this submission came from such as "Contact Us", "Unit details", etc.
Message	String	5000	Used as a catch all field for notes and ancillary data that is not available through the API. Can include   tags for formatting.
CheckInDate	Date		Format as MM/DD/YYYY
CheckOutDate	Date		Format as MM/DD/YYYY
Adults	Int32		Set to 0 if no data supplied
Children	Int32		Set to 0 if no data supplied
Nights	Int32		Set to 0 if no data supplied
Unit	String	50	
ReasonForStay	String	50	Look up field
Optin	Boolean		Format as "Yes" or "No" based on if the lead can receive emails.
KeyWord	String	50	Must match a valid campaign keyword. See Keyword submission section below.
SendEmail	Boolean		Format as "Yes" or "No" based on if the form data should be emailed to the property in addition to being submitted into the ELM.

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If you use the form submission method, you will have to provide Revinate the URL for the landing page the user will arrive at after submitting the form. Accounts are limited to a single landing page for all form submissions to the ELM so if multiple forms are used they will have to share a landing page.

### Keyword submission

**NOTE:** *If there is no additional Revinate functionality on the website you can disregard this section and submit blank keyword values.*

Both the web service and form submission methods allow for a field for the keyword which will correspond to the driving marketing campaign set in previous Revinate code that must be present on the webpage. Submitting the keyword requires that the **Load Revinate JavaScript Library and Process Campaign Keyword** code be implemented using the instructions [here](#).

Implementing this code will require the following values, which should be provided by NAVIS:

**KEYWORD** – This is the keyword for your default website campaign

The keyword should be set as a hidden input within the form:

```
<input type="hidden" name="keyword" value="KEYWORD" id="contactus-form" />
```

After the close of the form the hidden input form field must be dynamically updated with the following code:

```
<script>NavisSetHiddenKeywordFieldD('contactus-form', 'KEYWORD');</script>
```

You can rename the id of the hidden input field as long as it is unique to the page and is referenced in the function call that follows the form. **KEYWORD** should be replaced by the keyword value provided by Revinate.

### Implementation Example

There are numerous ways to implement this integration but one example using the direct form submission method to send Revinate data directly can be found below:

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First Name

Last Name

Email

Phone

How may we help you?

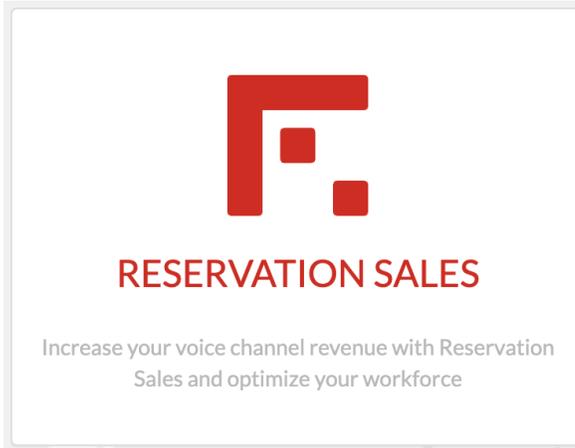
```
<form
action="https://www.navistechnologies.info/Narrowcast2005/ELM/ELMContactPost.as
px" method="get">
<input type="hidden" name="account" value="12345" />
<input type="hidden" name="keyword" value="organic" id="contactus-form" />
<label>First Name</label><input type="text" name="FirstName" value=""><br />
<label>Last Name</label><input type="text" name="LastName" value=""><br />
<label>Email</label><input type="email" name="EmailAddress" value=""><br />
<label>Phone</label><input type="text" name="HomePhone" value=""><br />
How may we help you?<br />
<textarea rows="5" cols="60" name="Message" value=""></textarea><br />
<input type="submit" value="Submit">
</form>
<script>NavisSetHiddenKeywordFieldD('contactus-form','organic');</script>
```

In this example the **KEYWORD** value was (no quotes) "organic".

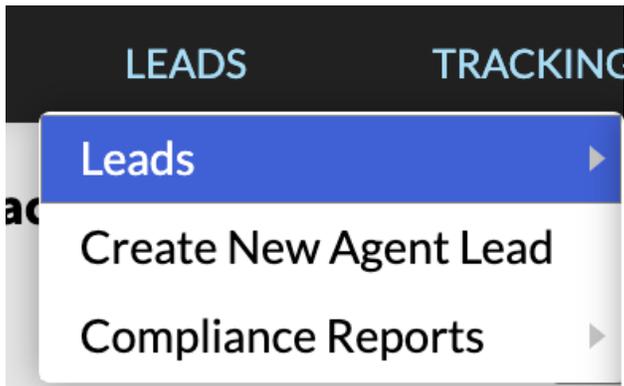
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### How to Test

1. Make a test entry with the form using test data with an email address that is not already associated with an open lead and log into the account ELM system at <https://home.revinate.com/>.
2. Next, select the Reservation Sales tile:



3. Next, select the Leads option under the Leads menu:



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4. Search for your test entry in the Email filter field. For this example the test entry was from [testentry@revinate.com](mailto:testentry@revinate.com):

<b>Date Type</b>	Contact Date	▼
<b>Start Date</b>	8/9/2024	▼
<b>End Date</b>	8/9/2024	▼
<b>First Name</b>	<input type="text"/>	
<b>Last Name</b>	<input type="text"/>	
<b>Phone #</b>	<input type="text"/>	
<b>Email</b>	test	

5. You will be alerted if no entries are found:

**ELM Leads (No Leads Found)**

6. Otherwise, the entry will show:

**ELM Leads (1 Leads)**

<b>Date Type</b>	Contact Date	▼	<b>Lead Status</b>	All	▼
<b>Start Date</b>	8/9/2024	▼	<b>Contact Type</b>	All	▼
<b>End Date</b>	8/9/2024	▼	<b>Non-Booking Reason</b>	All	▼
<b>First Name</b>	<input type="text"/>		<b>ELM Compliance</b>	All	▼
<b>Last Name</b>	<input type="text"/>		<b>Select Agent Type</b>	Originating Agent	▼
<b>Phone #</b>	<input type="text"/>		<b>Selected Agent</b>	All	▼
<b>Email</b>	test		<b>Call Results</b>	All	▼
			<b>Reason For Stay</b>	All	▼

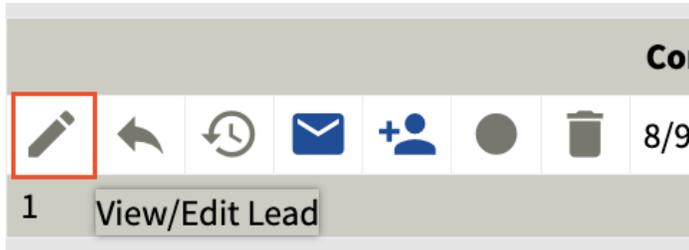
Attention Required  Show First Note/Email  Show Most Recent Note/Email

	Contact Date/Time	Contact Type	Lead Status	Resp
     	8/9/2024 8:44:57 AM	Email	Followup	

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- If no entry is found and you've verified that the data being submitted to Revinate meets the submission requirements outlined above, then notify Revinate Support. Otherwise, continue:
- Open the ELM record by clicking the pencil icon:



- Verify that all data being pushed to Revinate from the form is present in the Lead Information screen:

**Lead Form**

ELM Lead #: 18696535004 ?

<b>Lead Information</b>	
First Name <input type="text" value="Test"/>	Campaign <input type="text"/>
Last Name <input type="text" value="Test"/>	Tollfree Number <input type="text"/>
Home Phone <input type="text"/>	Address 1 <input type="text"/>
Work Phone <input type="text"/>	Address 2 <input type="text"/>
Cell Phone <input type="text"/>	City <input type="text"/>
Calling Phone <input type="text"/>	State <input type="text"/>
Email Address: <input type="text" value="testentry@revinate.com"/> <input type="checkbox"/> DNA <input type="checkbox"/> RTG <input type="checkbox"/> OptOut	Zip Code <input type="text"/>
Check In Date <input type="text"/>	Country <input type="text" value="United States"/>
Nights <input type="text" value="0"/>	New Last Followup Agent <input type="text" value="Kayla Lannoye"/>
Check Out Date <input type="text"/>	Assigned Agent <input type="text"/>
Reason for Stay <input type="text"/>	Send Reminder Email <input type="text" value="12:00 PM"/>
Adults <input type="text" value="0"/>	Custom Lead Rank <input type="text" value="5"/>
Children <input type="text" value="0"/>	Lead Status <input type="text" value="Followup"/>
Unit <input type="text"/>	Reservation #(s) <input type="text"/>
Price Estimate <input type="text"/>	Last Followup Agent <input type="text"/>
Previous Stay Date <input type="text"/>	Last Update <input type="text"/>
Originating Agent <input type="text"/>	

- If the information that is sent to Revinate does not match the information on the ELM record, verify the variable names that are sent to Revinate match those in the documentation.
- Finally, if you implemented the Keyword submission functionality in this document you will need to verify that the Campaign on the Lead Information form matches the Campaign associated with the campaign keyword sent to Revinate. You can trigger the test campaign by including "nck=test" in the querystring of the URL for the form when you submit it.