

Traditional Lead Capture

This user guide will give an overview of the Traditional Lead Capture feature. Lead Capture is a workflow designed to entice a prospective Client to sign up to work with an Advisor or firm by letting them illustrate a goal, identify a need, and streamline a path for getting help. The workflow ends with requesting a consultation with the Advisor. Once completed, the Client will be added to the Advisor’s eMoney Client list. From there, a Client Website can be established by sending the Client through Self-Registration.

Note: If a user has either the Redtail or Wealthbox Integration enabled, a prospective Client created by Lead Capture will automatically be added to the respective application. Their first name, last name, and email will populate the new profiles.

Users with a Support license will have access to the Lead Capture settings *only* if they are set up as a Delegate under an Advisor’s Sharing Rules.

This user guide is broken out into two components:

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Advisor Settings

- To set up Lead Capture, click **Settings** on the top navigation bar and select **Lead Capture**.

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Go back to Settings

Settings

- Preferences
 - My Info
 - General
 - Sharing Rules
 - Alliance Partners
 - Alerts
 - Client History
 - Branding
 - Monte Carlo
 - Lead Capture**
 - Marketing
- Security
 - Change Password
 - Change Secret
 - Additional Security

Lead Capture Settings

Lead Capture is a workflow designed to entice a prospective client to sign up to work with an advisor by letting them play with a goal, identify a need, and streamline a path for getting help. Lead Capture is publicly accessible via a custom URL that the advisor can use on their corporate site, social media, or email.

Select an Advisor

Choose an advisor from the list below to adjust Lead Capture Settings on behalf of

Masters, Mark

Headline

Create an investment plan to achieve your goals THIS CAN BE CUSTOMIZED

Body

Before we can build a plan to help you meet your financial goals, we'll need to know a bit more about you. In this short exercise, answer questions about yourself and your future objectives. Then, request a consultation so that together, we can build a plan to help you get there.

THIS CAN BE CUSTOMIZED

Save Reset to defaults

Link

Copy this link to share it with your potential leads. You may delete this link and generate a new one at any time.

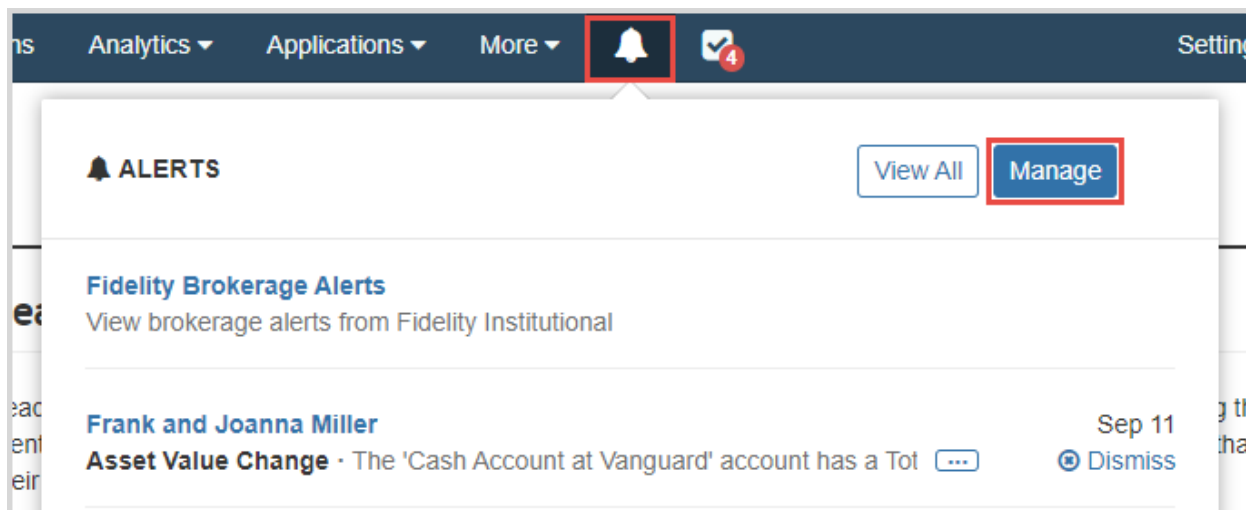
https://connect.emaplan.com/7c9 Copy Invalidate Link

Note:

- The **Headline** and **Body** fields may not be editable based on your Enterprise. If they are editable, you can click **Reset to defaults** to revert any changes made, if necessary.
- Use the **Copy** button on the lower right-hand side to copy the populated **Link** and embed it on your website, social media, send it via email and more. This is the link used by Clients to begin the Lead Capture workflow!

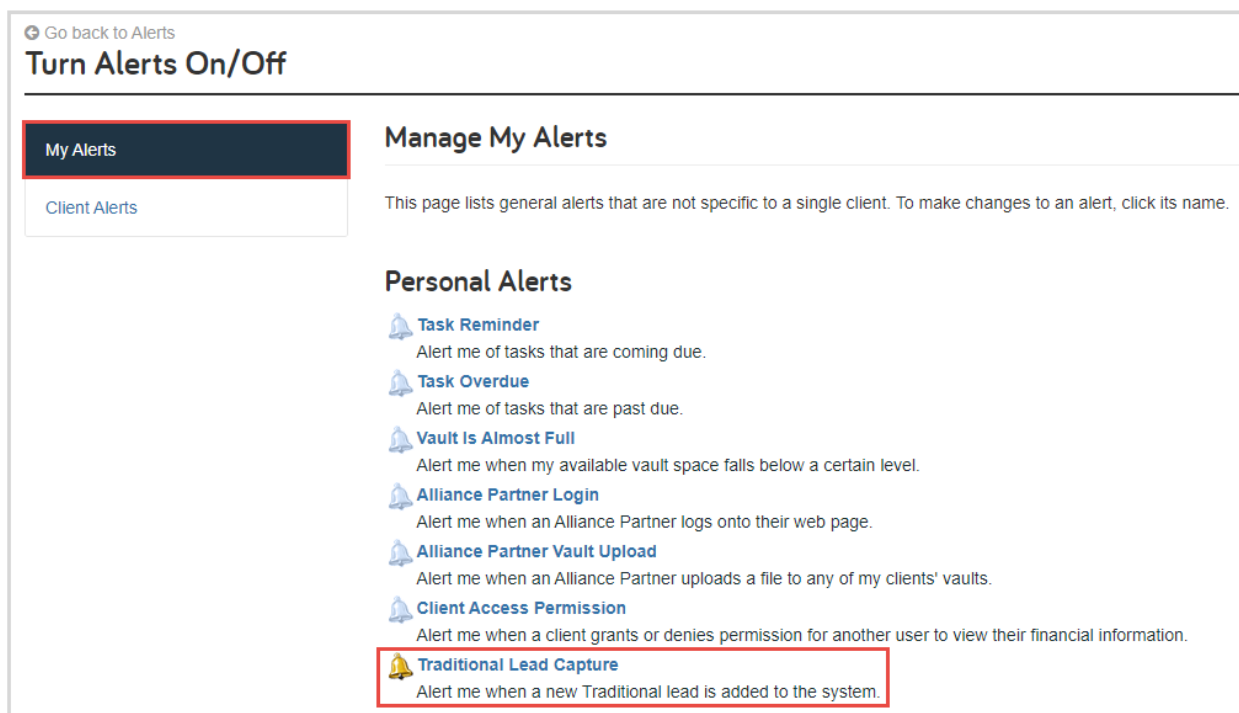
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- Next, confirm that the associated Lead Capture alert is configured to your preferences. Click the **Bell** icon, then click **Manage**.



Note: Support licensed users do NOT have the Lead Capture Alert. New leads added will not appear under their Alert notifications.

- From the **Manage My Alerts** page, click into the **Traditional Lead Capture** alert.



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4. By default, a triggered alert will appear in your Financial Feed on the Home Page. The Current Status allows you to enable or disable the alert. To have an email sent when the alert conditions are met, click **Delivery Options**.

Manage My Alerts > Traditional Lead Capture

Alert me when a new Traditional lead is added to the system.

Alert Settings
 Delivery Options

Current Status

ENABLED

This alert is currently enabled and will generate a notification when its conditions are met.

Send a Notification:

5. Enter your email then click **Add Email**.

Manage My Alerts > Traditional Lead Capture

Alert me when a new Traditional lead is added to the system.

Alert Settings
 Delivery Options

Email Recipients

Notifications for this alert will appear only on your View Notifications page. If you want notifications to also be sent via email, use the controls below to add email recipients.

Add Recipients

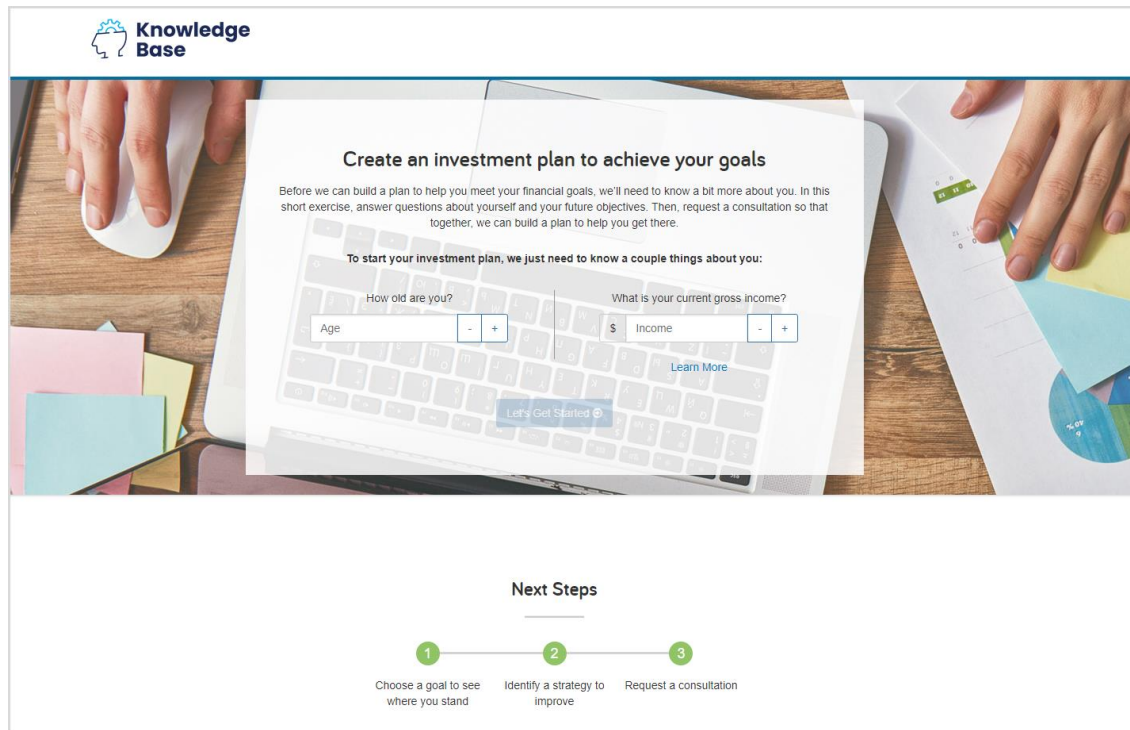
In order for you to be able to receive email notifications, your email address must be included in your profile.

Enter an Email Address:

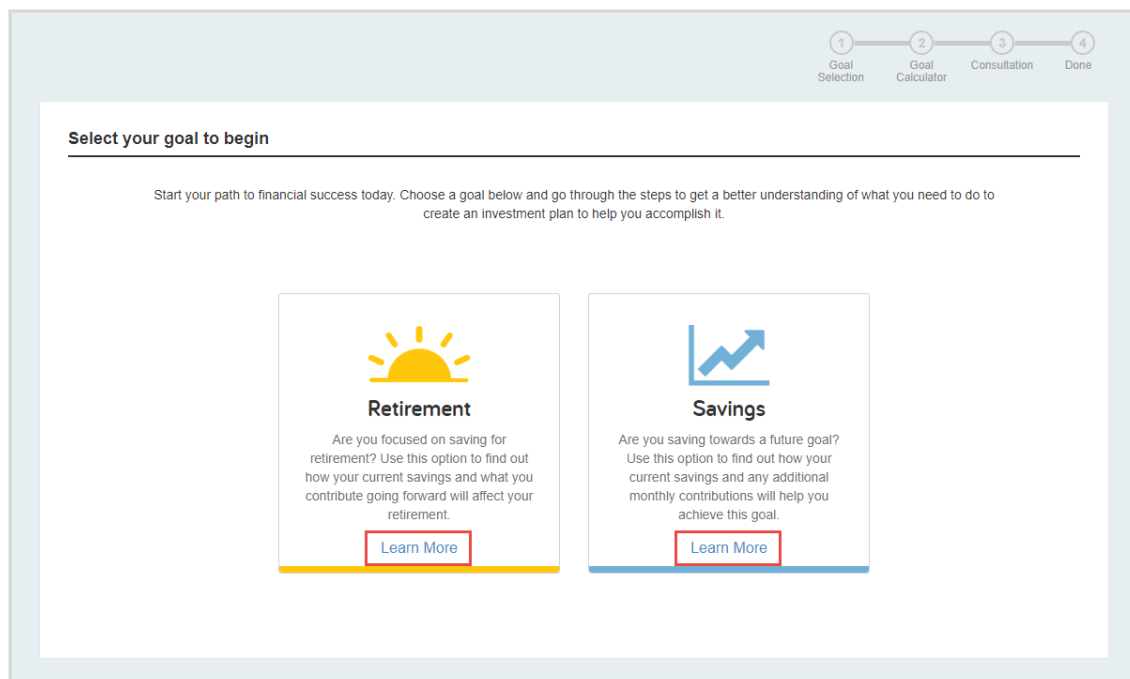
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Prospective Client Workflow

1. A prospective Client begins the workflow after clicking the **Traditional Lead Capture** link. They will enter their current age and current income, then click **Let's Get Started**.



2. Next, the prospective Client will select a goal – they can choose from either a **Retirement** or **Savings** goal. The goal selected here will then flow through to the prospective Client's Goals section of Facts.



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3. Depending on the goal selected, the inputs will vary. In the **Savings** goal, the prospective Client is instructed to pick a specific goal or select Other.

4. Next, they will enter details relating to that goal. Depending on their inputs, the workflow will generate some options on how they might improve the funding of their goal.

Category	Amount
Likely Amount Needed	\$200,000
Likely Amount Available	\$107,800
Shortfall	-\$92,200

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- The prospective Client will then be prompted to enter their contact information. When they click **Submit Request**, they will be added to your Client list in the system and designated as a **Lead**.

Ready to talk? ✖ Travel

No matter what your current situation, we can get on track to achieving your goals

First Name

Last Name

Email

Phone Number (optional)

Anything else we should know (optional)

I have read and agreed to the privacy policy. [Read more](#)

Note: The contact information and any notes entered in the additional information box will be added to their Client profile under Notes. The prospective Client will **not** yet have access to their website. To invite them to register for a Client Website, refer to the [Registration Invitation](#) interactive user guide.

- To find this prospective Client in the system, click **Clients**, then click **By Designation** and select **Lead** from the drop-down menu.

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Manage Integration Clients Manage Groups Add Client

Recent All Your Clients Clients Shared to You **By Designation: Lead** By Group

search by last name Search

Name	Email	Phone	User Name	Owner
Williams, Helen	a@b.com			Masters, Mark