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.

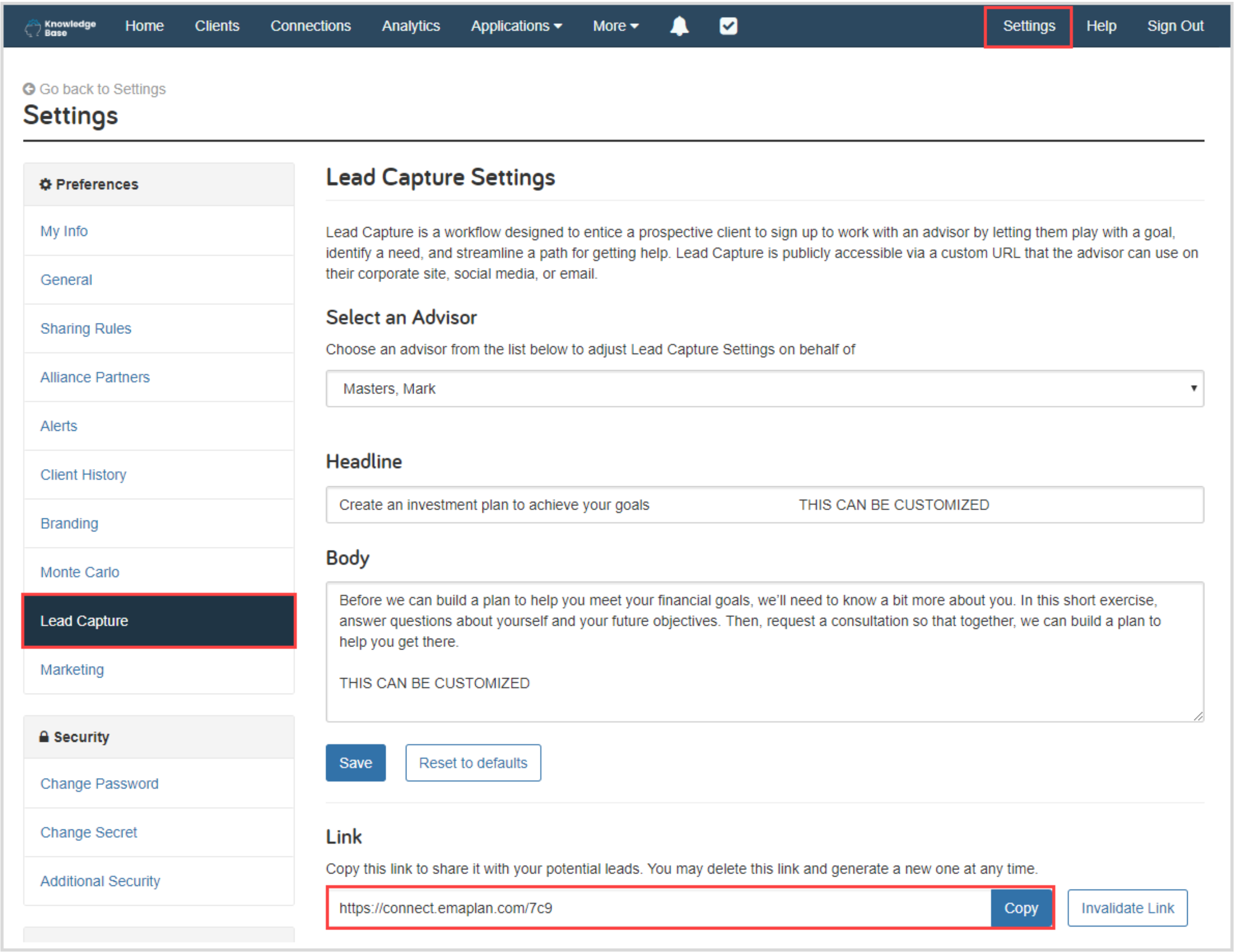
Users with a Support license will have access to the Lead Capture settings *only* if they are set up as a Delegate under an Advisor's Sharing Rules.

This user guide is broken out into two components:

Traditional Lead Capture

Advisor Settings

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



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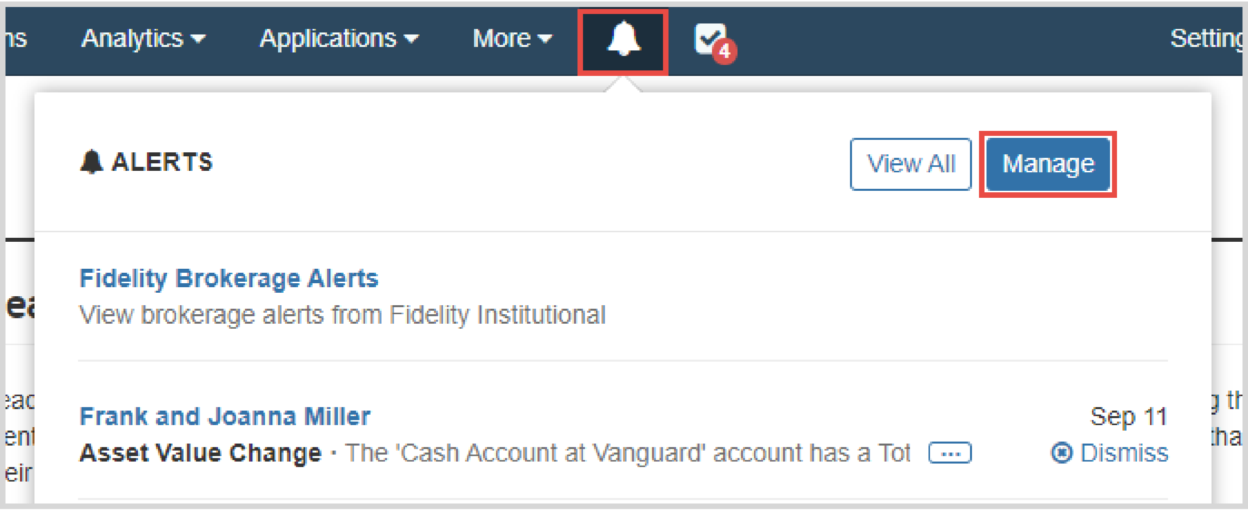
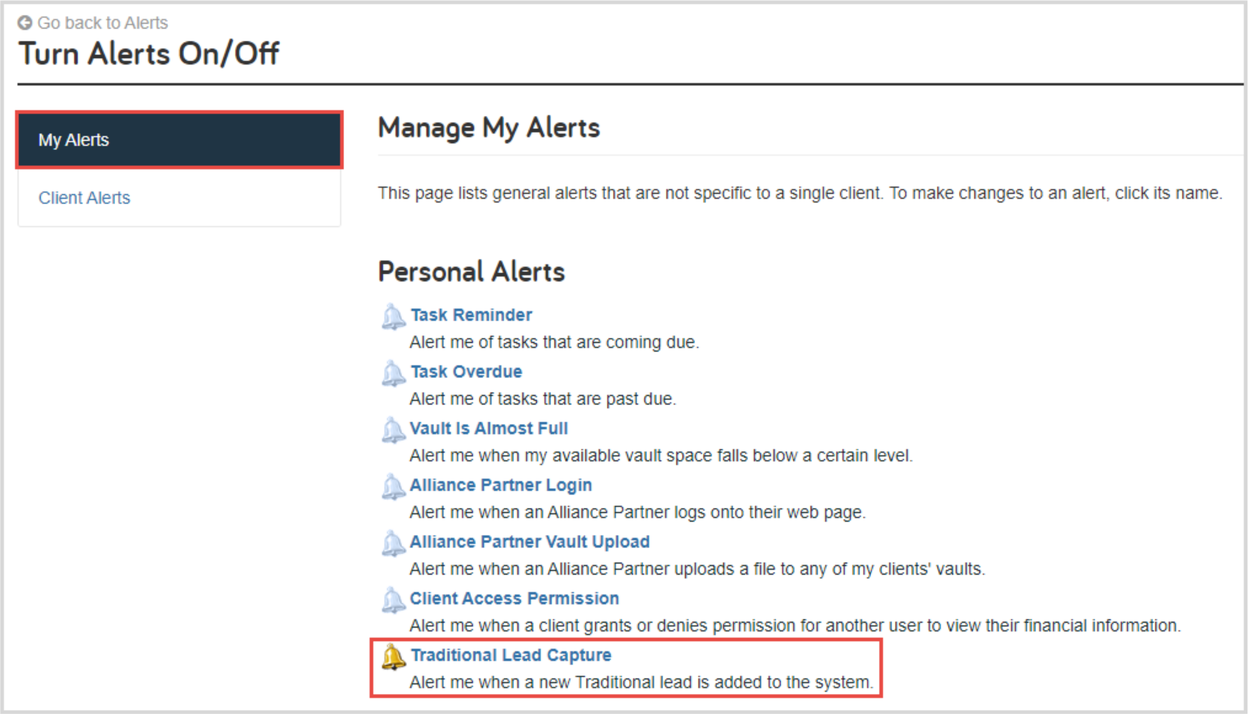
2. Next, confirm that the associated Lead Capture alert is configured to your preferences. Click the **Bell** icon, then click **Manage**.



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

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



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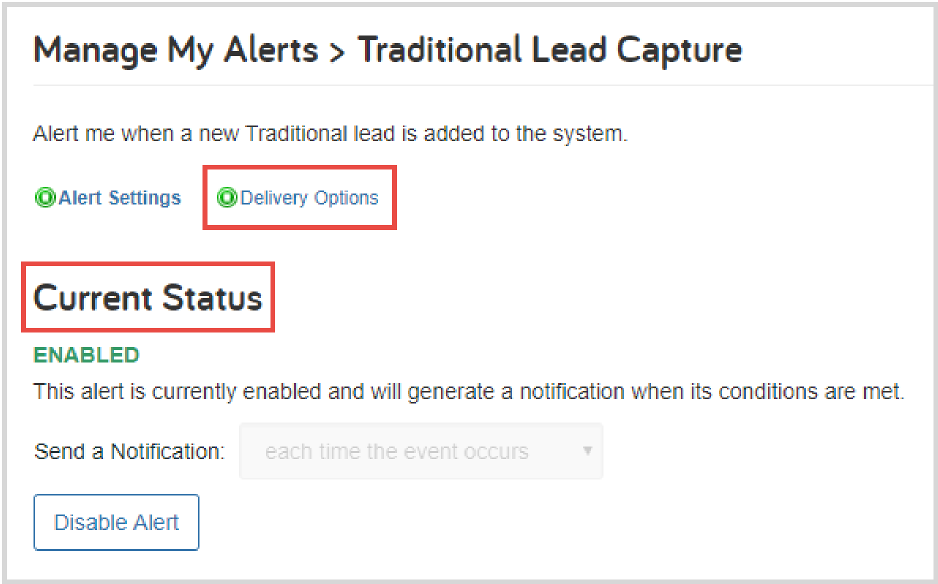
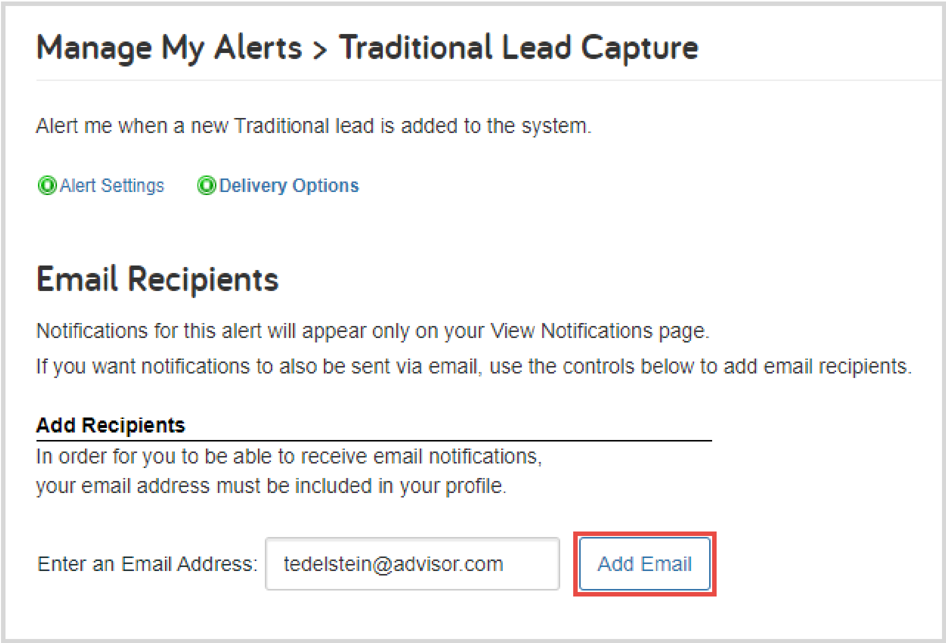
4. By default, a triggered alert will appear in your Financial Feed on the Home Page. The Current Status allows you to enable or disable the alert. To have an email sent when the alert conditions are met, click **Delivery Options**.



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



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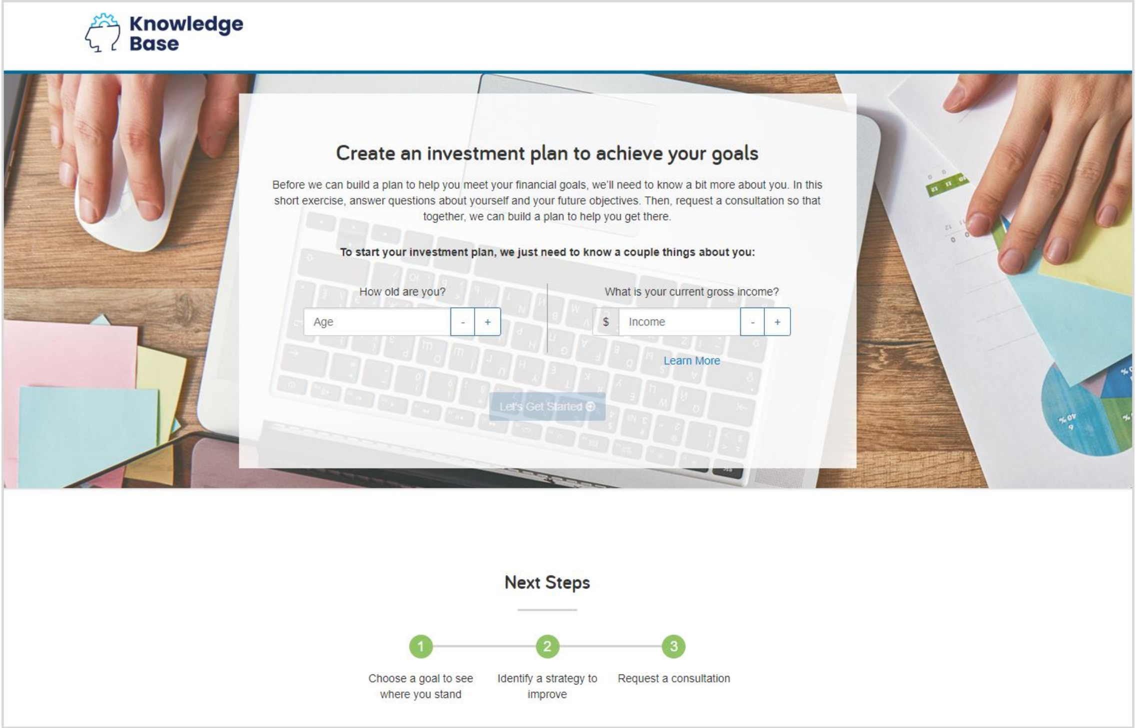
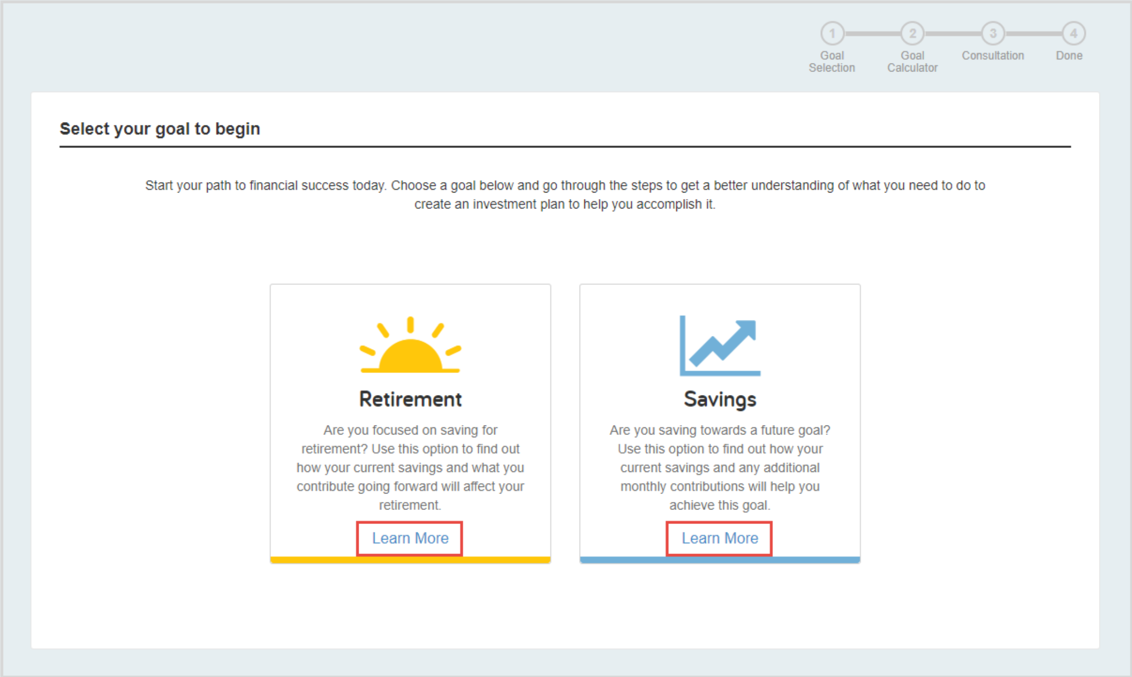
Prospective Client Workflow

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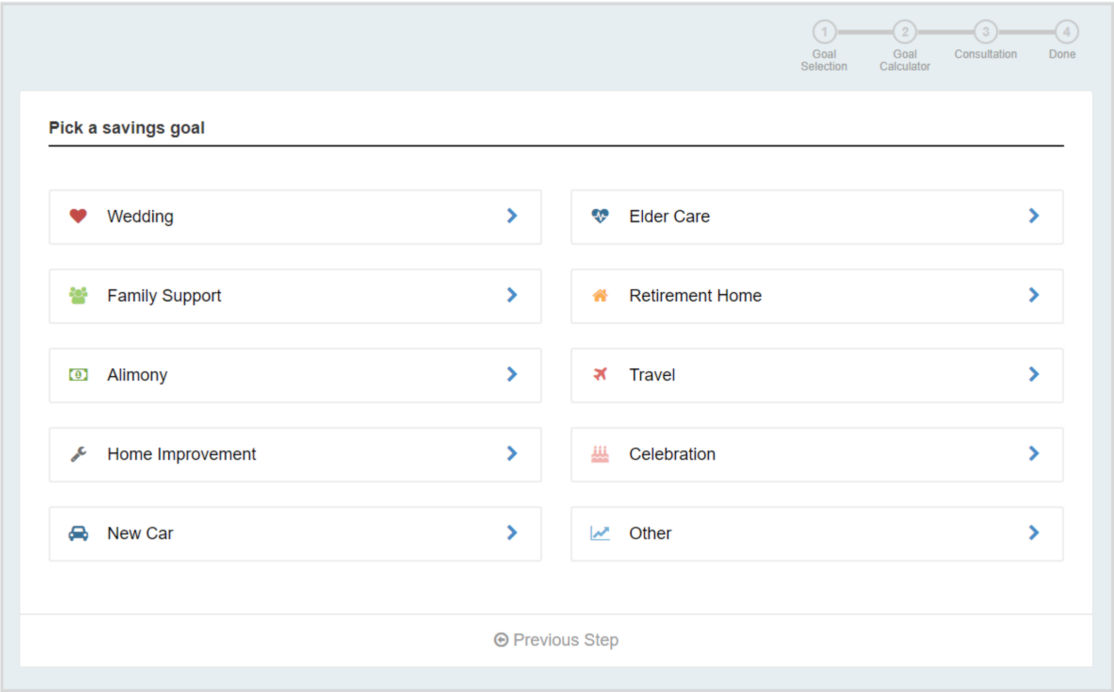
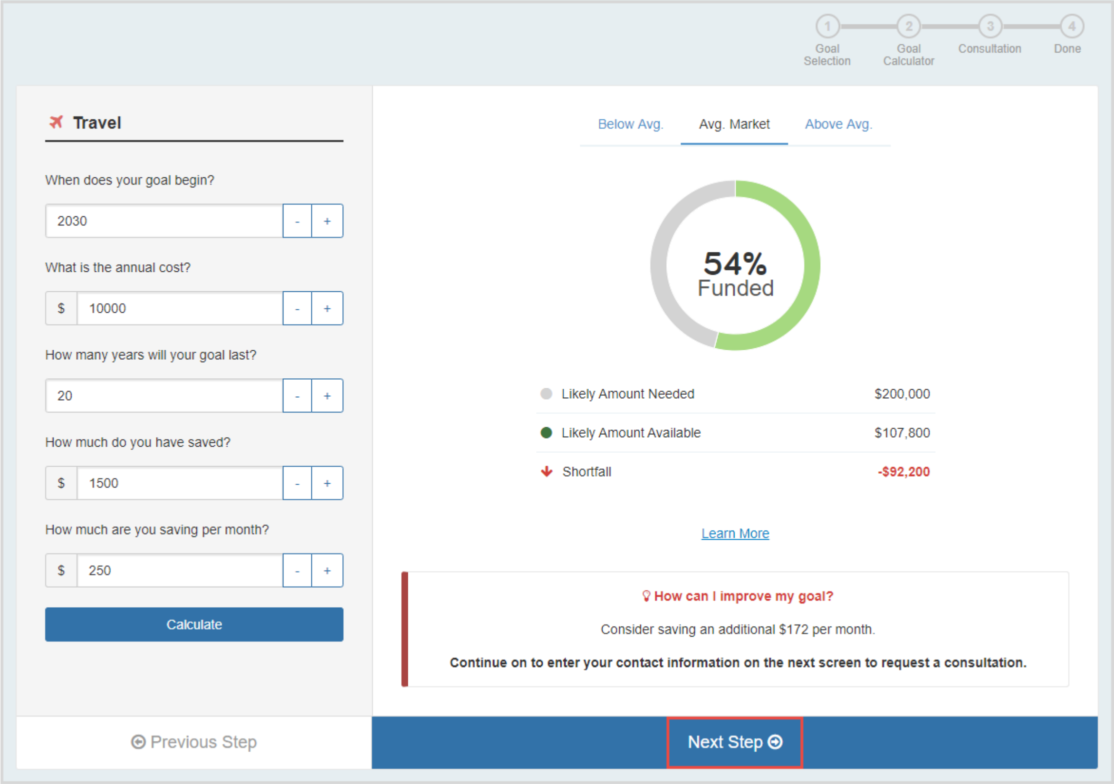
3. Depending on the goal selected, the inputs will vary. In the **Savings** goal, the prospective Client is instructed to pick a specific goal or select Other.



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.



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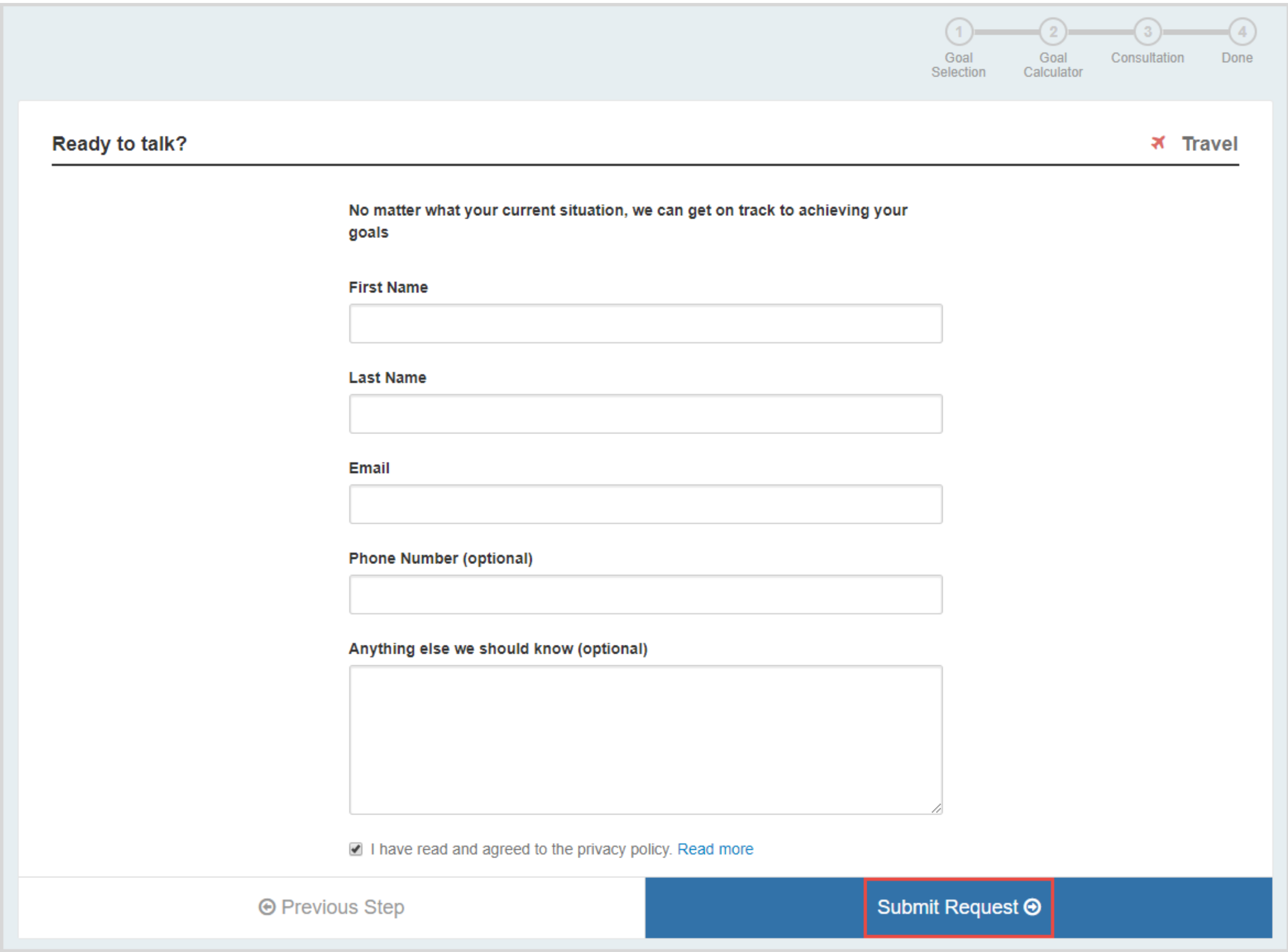
5. The prospective Client will then be prompted to enter their contact information. When they click **Submit Request**, they will be added to your Client list in the system and designated as a **Lead**.



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.

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