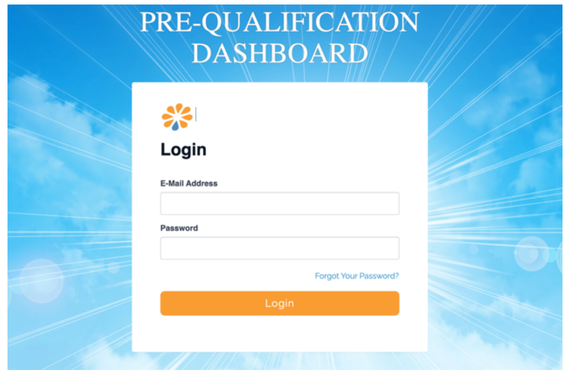
Funding Tool Setup Instructions

Login to the Funding Tool Portal

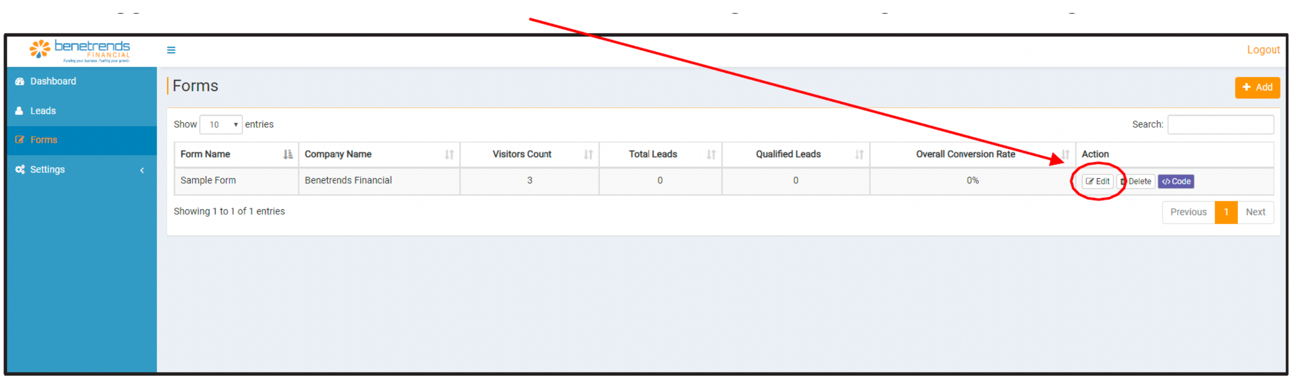
Visit https://prequal.benetrends.com/ to access the funding tool portal.

To login, use the following information:
Username: the email you shared with us which will accept all leads for your brand
Password: BT1234
***you can change this password later if you wish

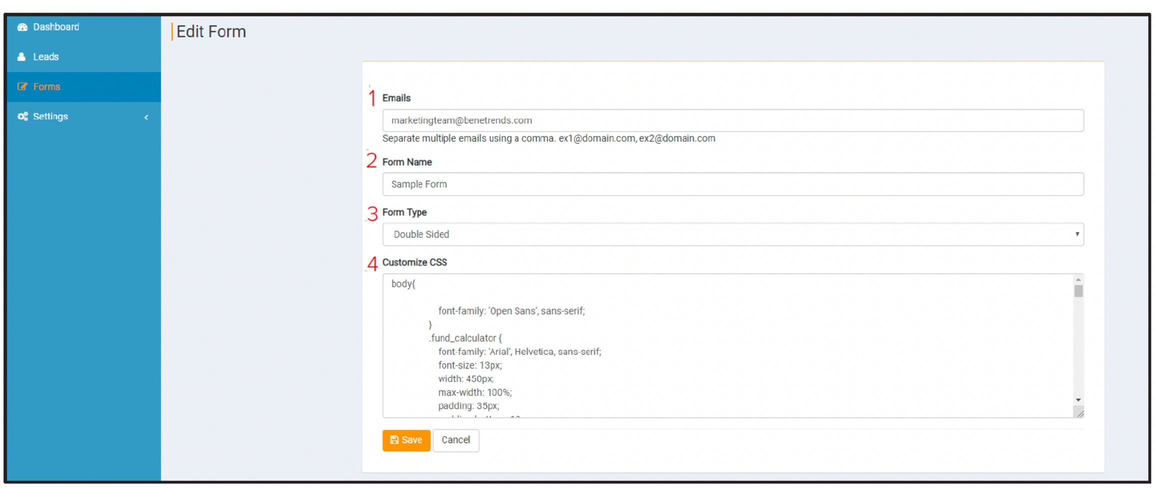


Edit Funding Tool

Once logged in, under Action, click the **Edit** button to change the settings of the funding tool.



Below is the edit form page where you can make various adjustments.



Email

Emails will already be populated. The emails field determines who will receive notification of when someone submits info on the form. Please keep Benetrends email(s) in the email field to ensure prospects aren't forgotten about/the proper sales rep is made aware of the submission. You can add additional email addresses or change out emails when personnel changes occur.

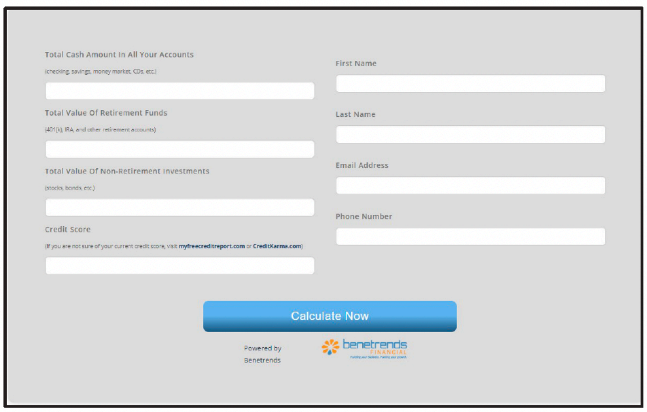
Form Name

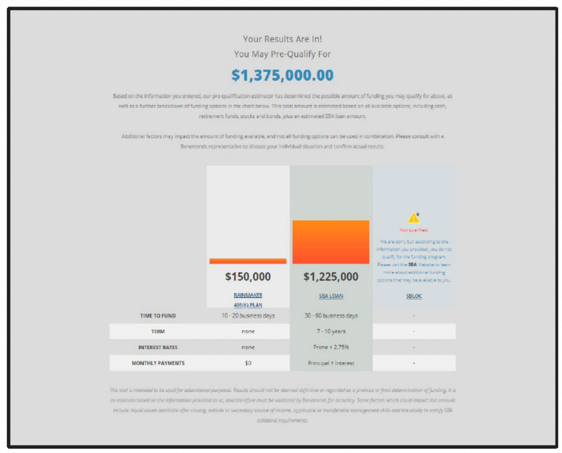
This field will also be pre-populated with the name of your brand.

Form Type

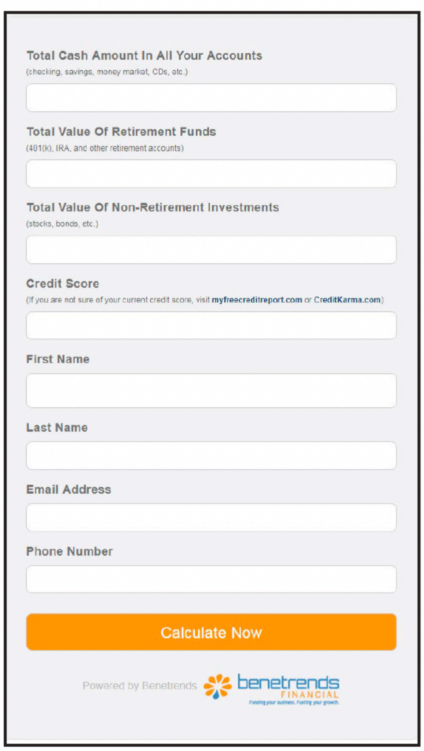
There are two variations of the funding tool: single- and double-sided. Here are how the two variations look.
All calculators sent are automatically set to double-sided, unless specified otherwise.

Here is a view of Double-Sided





Here is a view of Single-Sided



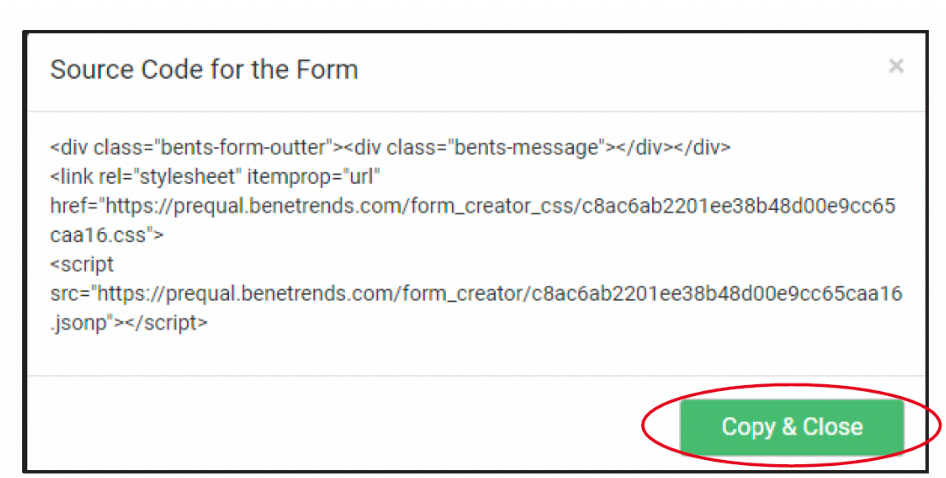
CSS Code

CSS Code allows the funding tool to be customized in various ways (i.e. colors, fonts, size, etc.). The standard form is neutral and works for most pages. For changes to occur to the funding tool, the CSS Code must be altered in the edit form page.

Adding the Funding Tool

To add the funding tool, the HTML code is needed. The HTML code is accessible through the **</> Code** button in the forms section.

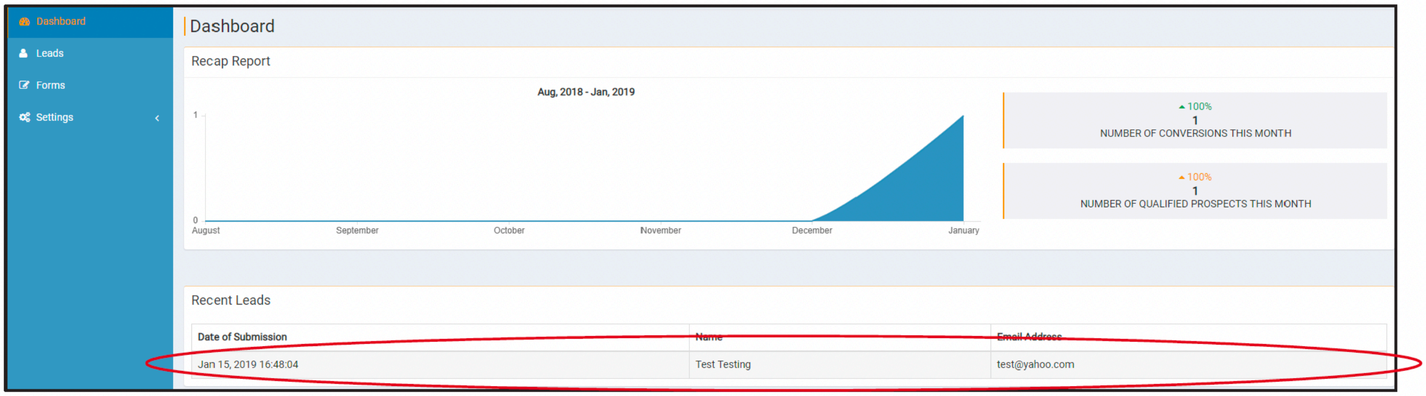
Once the **button** is clicked, the code will pop up on the screen.



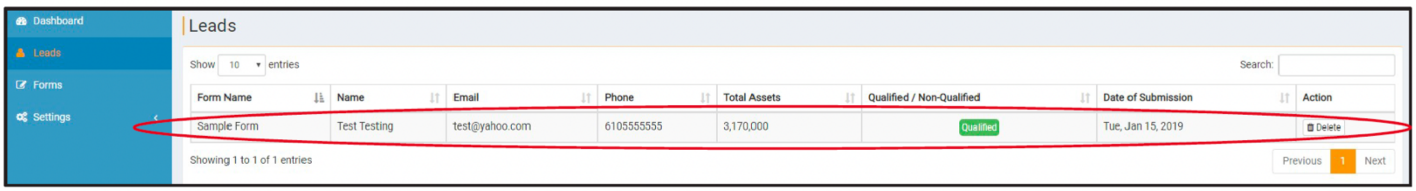
Once the HTML code is copied, paste it into the backend of your website where pages can be designed/modified. If you are working with a web developer, we will provide this to him/her for implementation.

How the Funding Tool Works

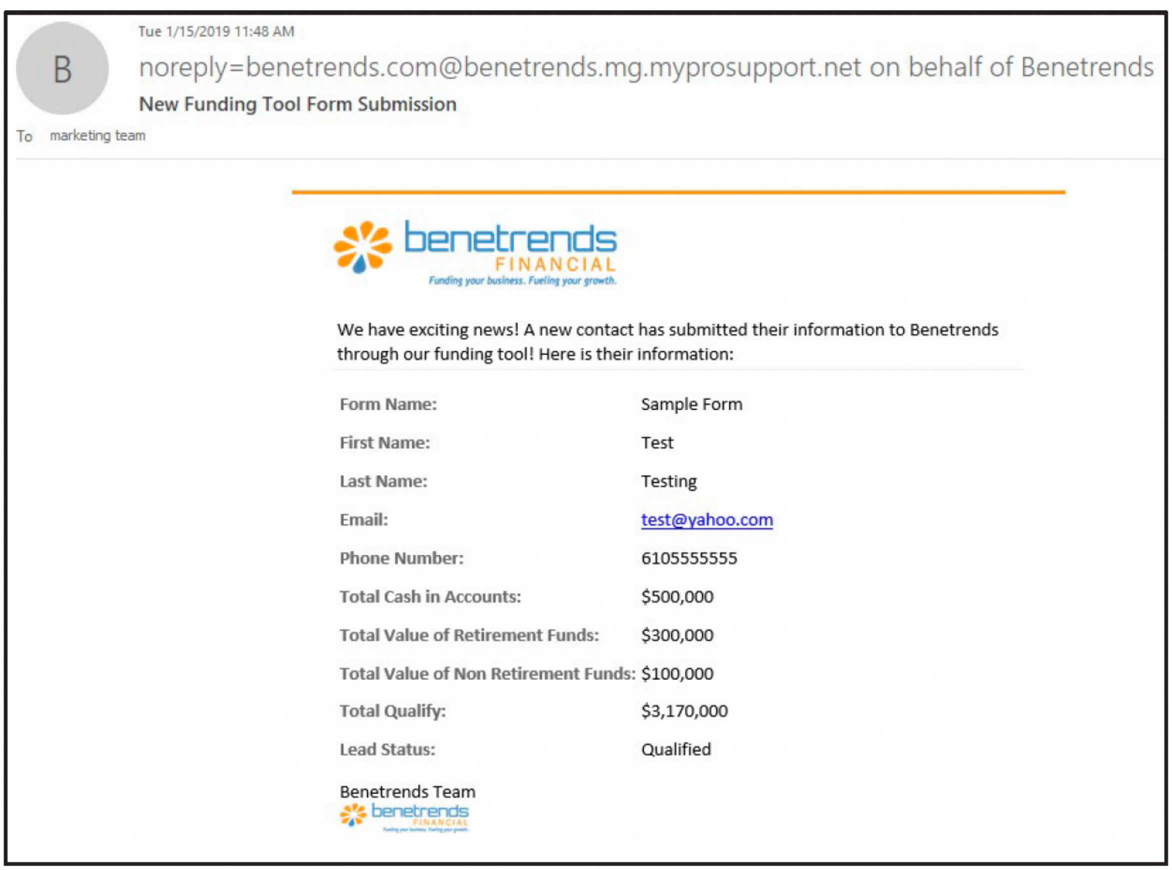
When someone submits their information, it is stored/viewable in the backend portal. When you log in, you'll arrive at the dashboard where you will see this:



To get more detail on leads submitted, click on the leads tab and you will see:



When a prospect submits their information, you will instantly receive notification. Be sure to whitelist noreply=benetrends.com@benetrends.mg.myprosupport.net so that you won't miss out on any notifications. **Your Senior Consultant will also receive notification. You should discuss the process on reaching out to your clients with him/her.**



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noreply=benetrends.com@benetrends.mg.myprosupport.net on behalf of Benetrends

New Funding Tool Form Submission

To marketing team

benetrends FINANCIAL
Funding your business. Fueling your growth.

We have exciting news! A new contact has submitted their information to Benetrends through our funding tool! Here is their information:

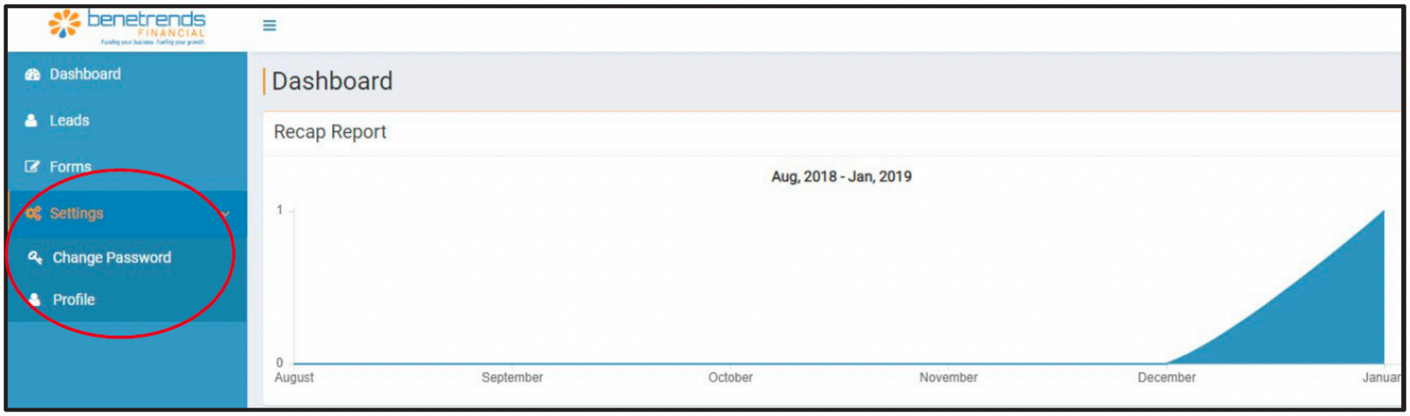
Form Name:	Sample Form
First Name:	Test
Last Name:	Testing
Email:	test@yahoo.com
Phone Number:	6105555555
Total Cash in Accounts:	$500,000
Total Value of Retirement Funds:	$300,000
Total Value of Non Retirement Funds:	$100,000
Total Qualify:	$3,170,000
Lead Status:	Qualified

Benetrends Team

Update Profile Settings

Need to make changes?

In the portal, the last option in the tab menu is Settings. Click **Settings** and **Change Password** and **Profile** will appear. Here you can revise your password or change the email to log into the portal.



Change Password

Profile

Questions?

Contact the Marketing Department

MarketingTeam@benetrends.com