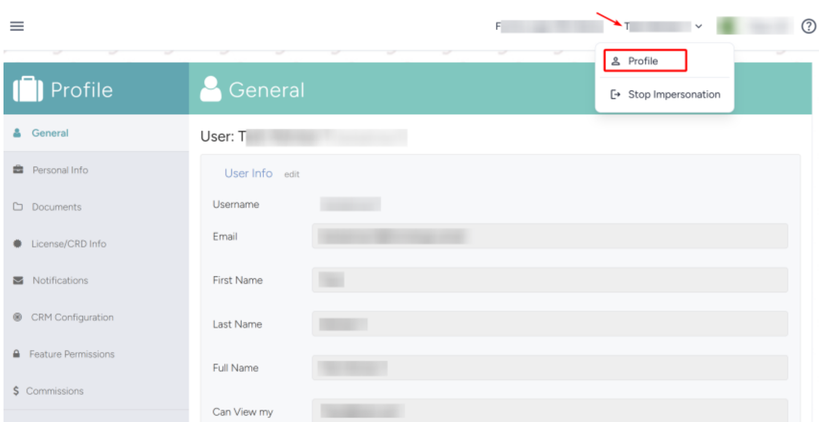
Wealthbox CRM Setup in Forms Logic

OVERVIEW

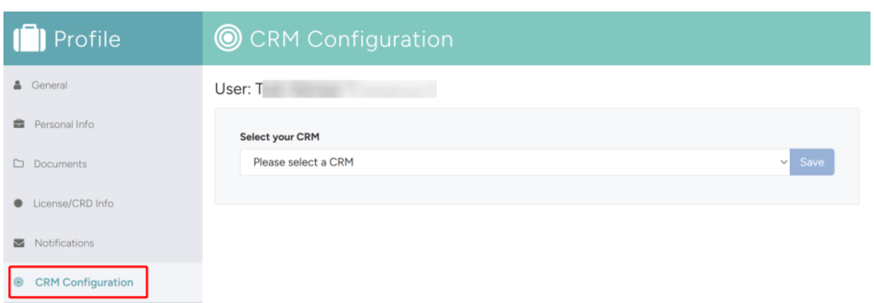
The Wealthbox CRM Integration connects Forms Logic with your Wealthbox contact database, allowing you to pull existing client data directly into new account and maintenance workflows. This eliminates manual data entry and ensures workflow information is populated accurately from your CRM.

CONFIGURE IN FORMS LOGIC

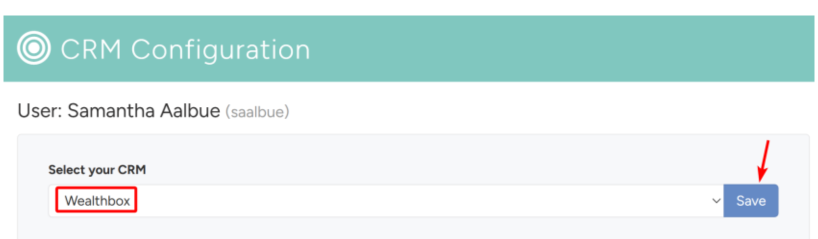
1. Click your user name in the upper right and click the **Profile** button from the dropdown. The Profile will load as shown below.



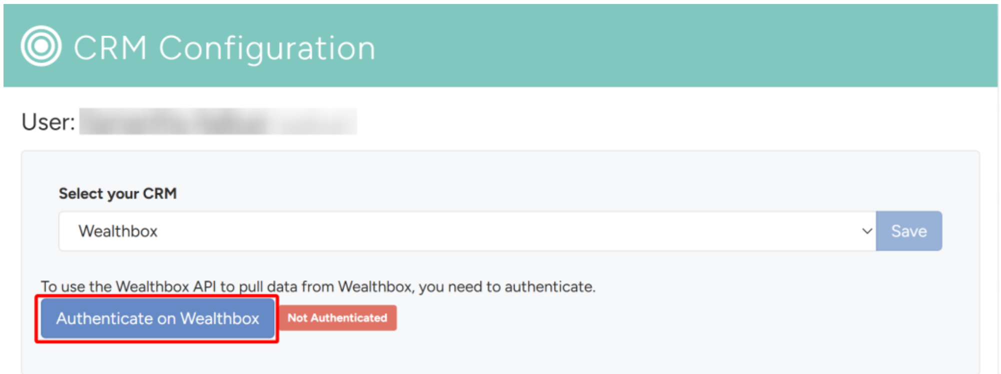
2. Navigate into the **CRM Configuration tab**.



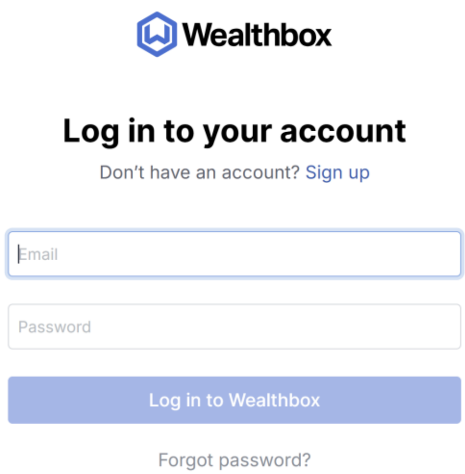
3. Select **Wealthbox** as the CRM and click **Save**.



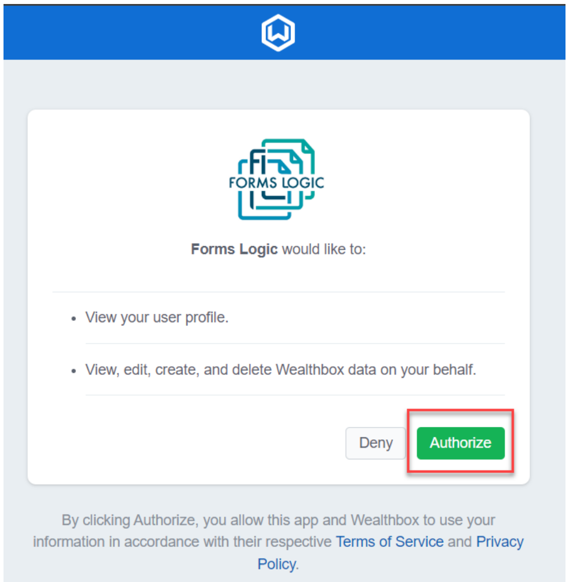
4. Click **Authenticate on Wealthbox**. On first setup you will see a red “Not Authenticated” message — this is expected.



5. A new window will open to the Wealthbox login page. Enter your Wealthbox username and password and click **Log in to Wealthbox**.



6. You will be prompted to authorize the integration with Forms Logic. Approve the authorization.

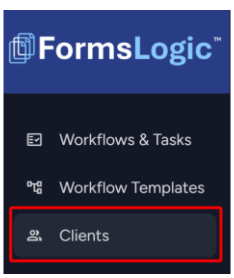


7. The CRM Credentials screen will update to confirm the integration is active. Click **Test Connection** to verify.

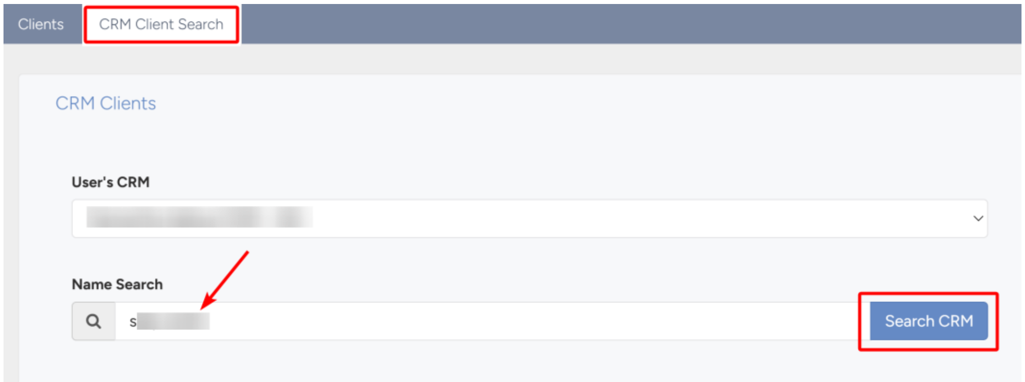
TEST THE INTEGRATION

To test the Wealthbox integration, follow these steps.

1. From the side navigation menu, navigate to **Clients**.



2. Click the **CRM Client Search** tab. In this tab, you can see the User's CRM is set up correctly by the (CRM – OK) under User's CRM. Enter a client's name and click **Search CRM**.



3. You will receive a success message and the name of the client will be listed. Click the **Create New Form Workflow** link next to the selected CRM client to create a workflow using the CRM integration.