

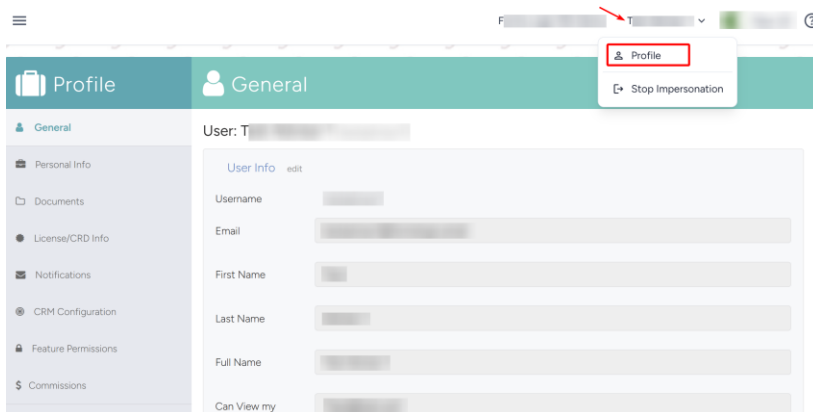
Wealthbox CRM Setup in Forms Logic

OVERVIEW

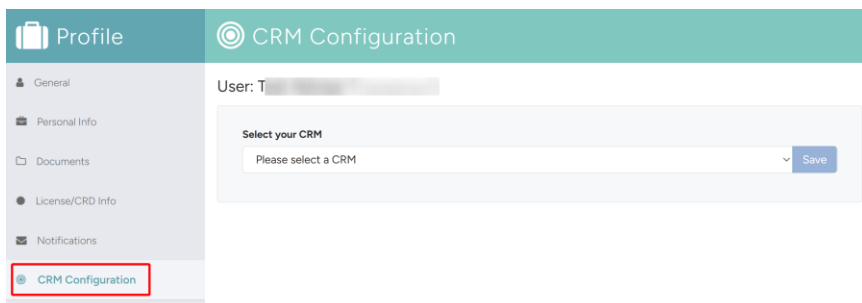
The Wealthbox CRM Integration connects Forms Logic with your Wealthbox contact database, allowing you to pull existing client data directly into new account and maintenance workflows. This eliminates manual data entry and ensures workflow information is populated accurately from your CRM.

CONFIGURE IN FORMS LOGIC

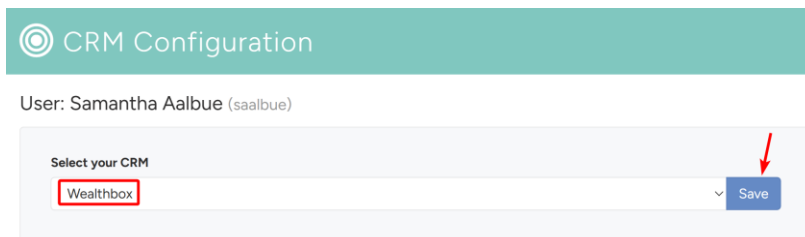
1. Click your user name in the upper right and click the **Profile** button from the dropdown. The Profile will load as shown below.



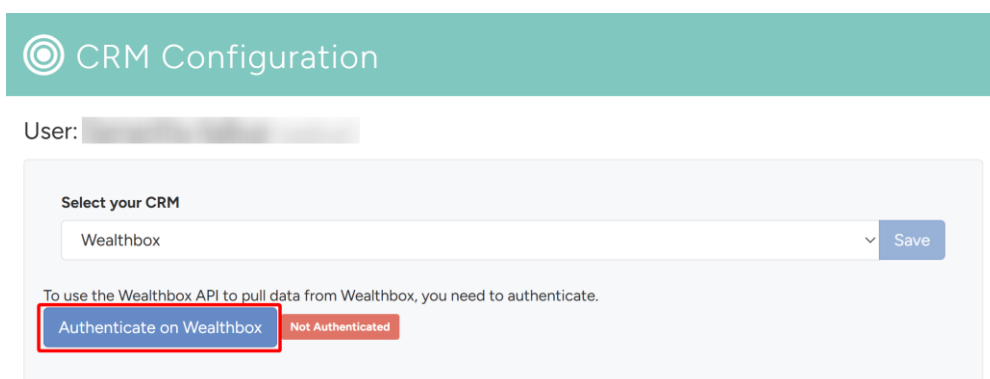
2. Navigate into the **CRM Configuration** tab.



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

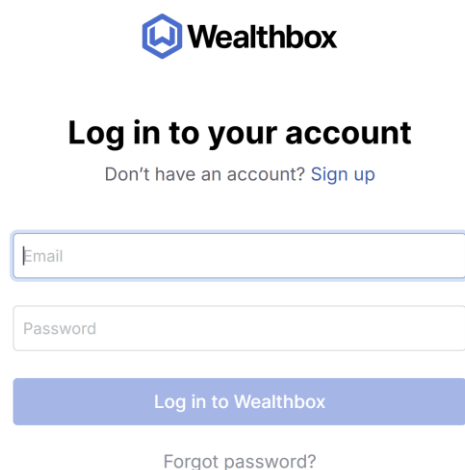


4. Click **Authenticate on Wealthbox**. On first setup you will see a red “Not Authenticated” message — this is expected.



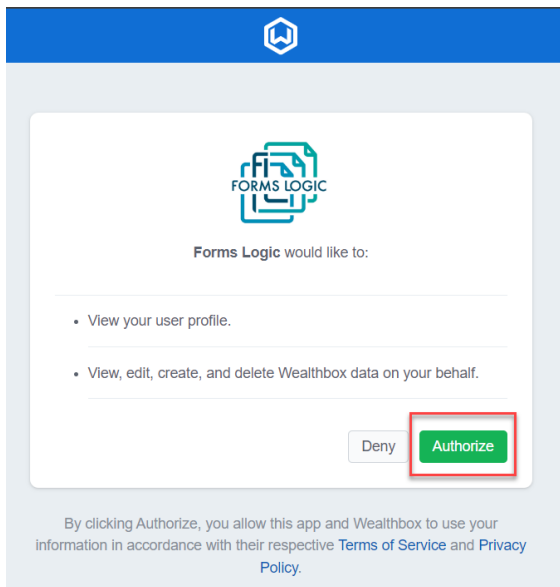
The image shows a 'CRM Configuration' interface. At the top, there's a teal header with a target icon and the text 'CRM Configuration'. Below this, a 'User:' label is followed by a blurred input field. A light gray box contains the 'Select your CRM' section. It features a dropdown menu with 'Wealthbox' selected, a 'Save' button, and a message: 'To use the Wealthbox API to pull data from Wealthbox, you need to authenticate.' Below the message are two buttons: 'Authenticate on Wealthbox' (highlighted with a red border) and 'Not Authenticated' (in red text).

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

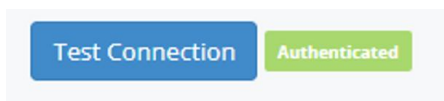


The image shows the Wealthbox login page. At the top is the Wealthbox logo. Below it is the heading 'Log in to your account' and a link 'Don't have an account? Sign up'. There are two input fields: 'Email' and 'Password'. Below these is a blue 'Log in to Wealthbox' button. At the bottom is a link 'Forgot password?'.

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



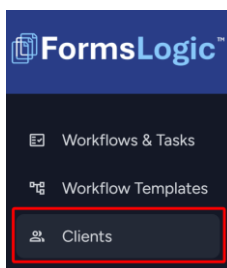
7. The CRM Credentials screen will update to confirm the integration is active. Click **Test Connection** to verify.



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**.

Clients CRM Client Search

CRM Clients

User's CRM

Name Search

Q s

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.

CRM Client Name	Action
S	Create New Form Workflow
Matching clients: 1	