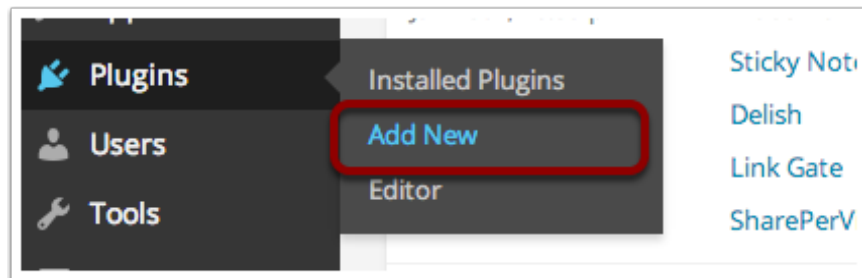


Lead Book User Guide

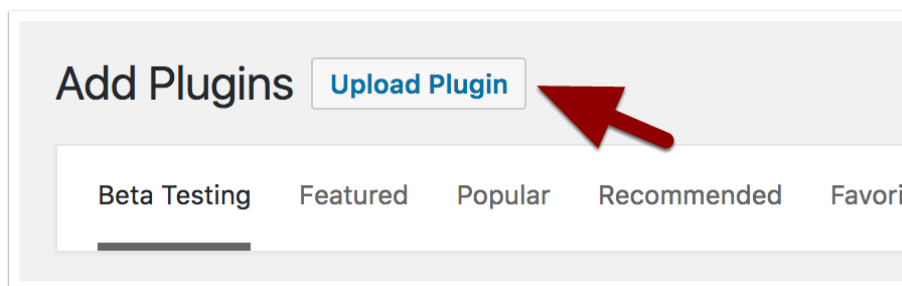
Installing A Plugin

To install a plugin, go to Plugins >> Add New



Upload plugin

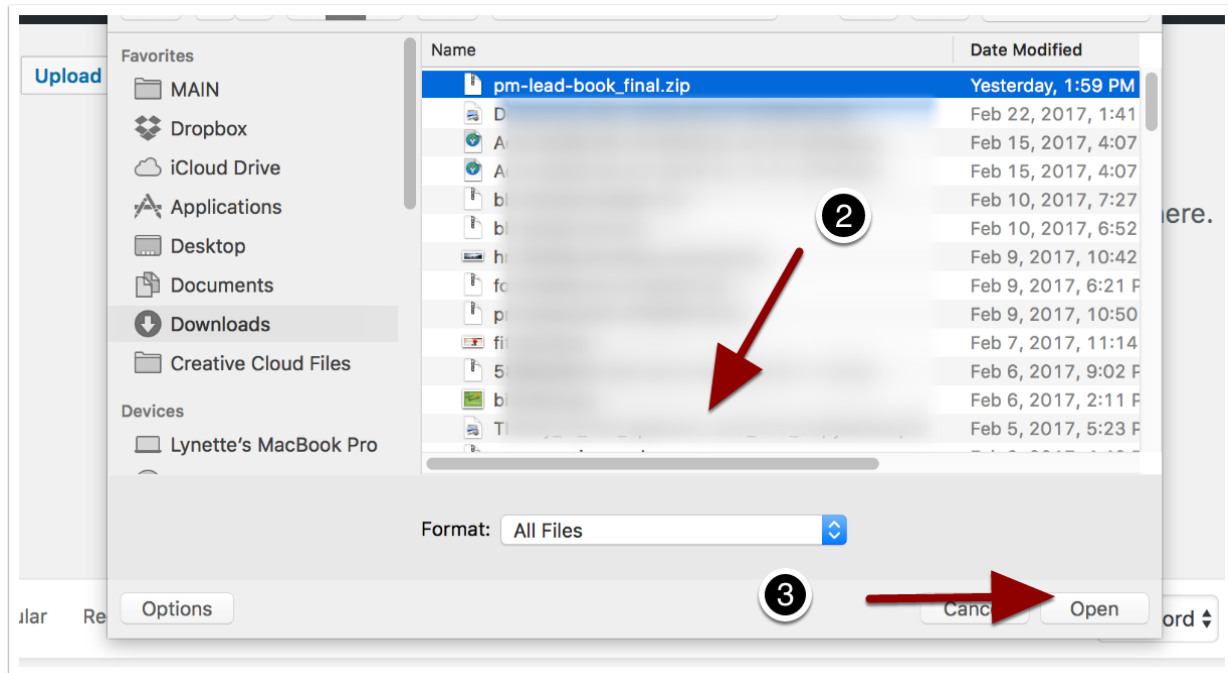
Click Upload Plugin



Lead Book User Guide

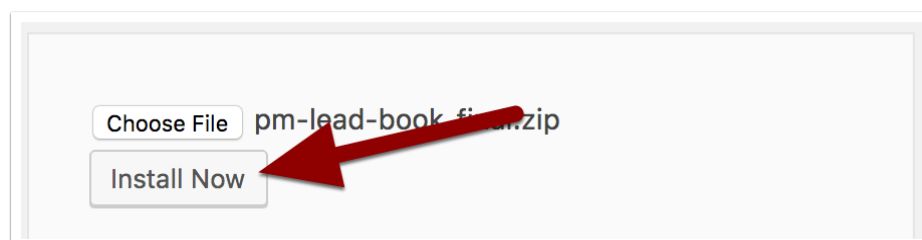
Choose Upload File

1. Click Choose File
2. Locate the zipped file of the plugin you'd like to install
3. Click Open



Install The Plugin

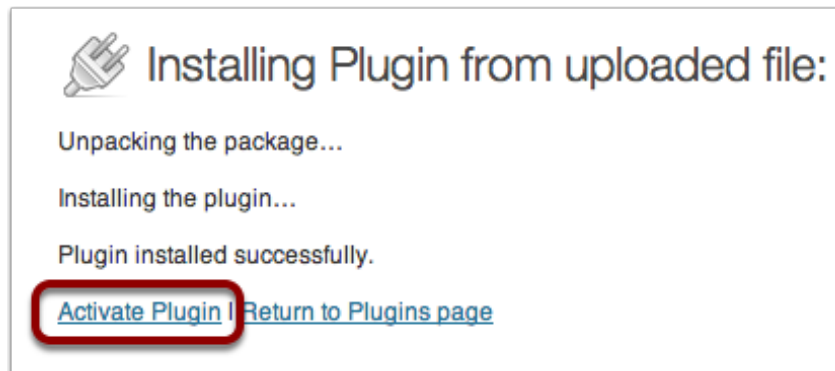
Click Install Now



Lead Book User Guide

Activate The Plugin

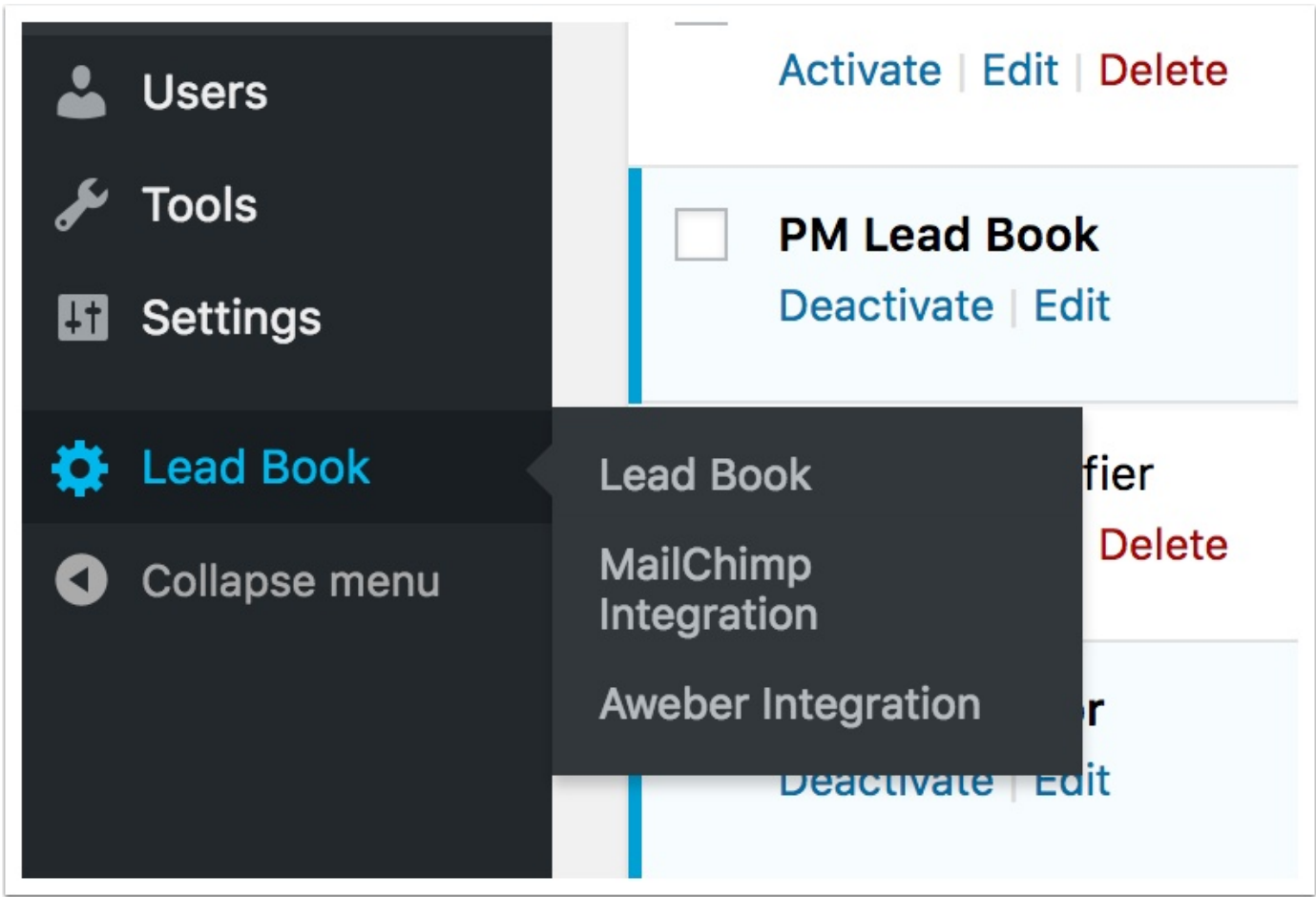
After successfully unpacking and installing the plugin, click *Activate Plugin*.



Lead Book User Guide

Lead Book Menu

After installation and activation, you will see a new menu item. Click that.



Lead Book User Guide

Facebook Configuration

Enter your Facebook App ID and App Secret. To learn how to create a Facebook app and obtain an ID and secret, see the accompanying How To Get A Facebook App ID user guide and save.

Facebook

Enter you Facebook Details

App Id:

Enter your Facebook AppID

App Secret:

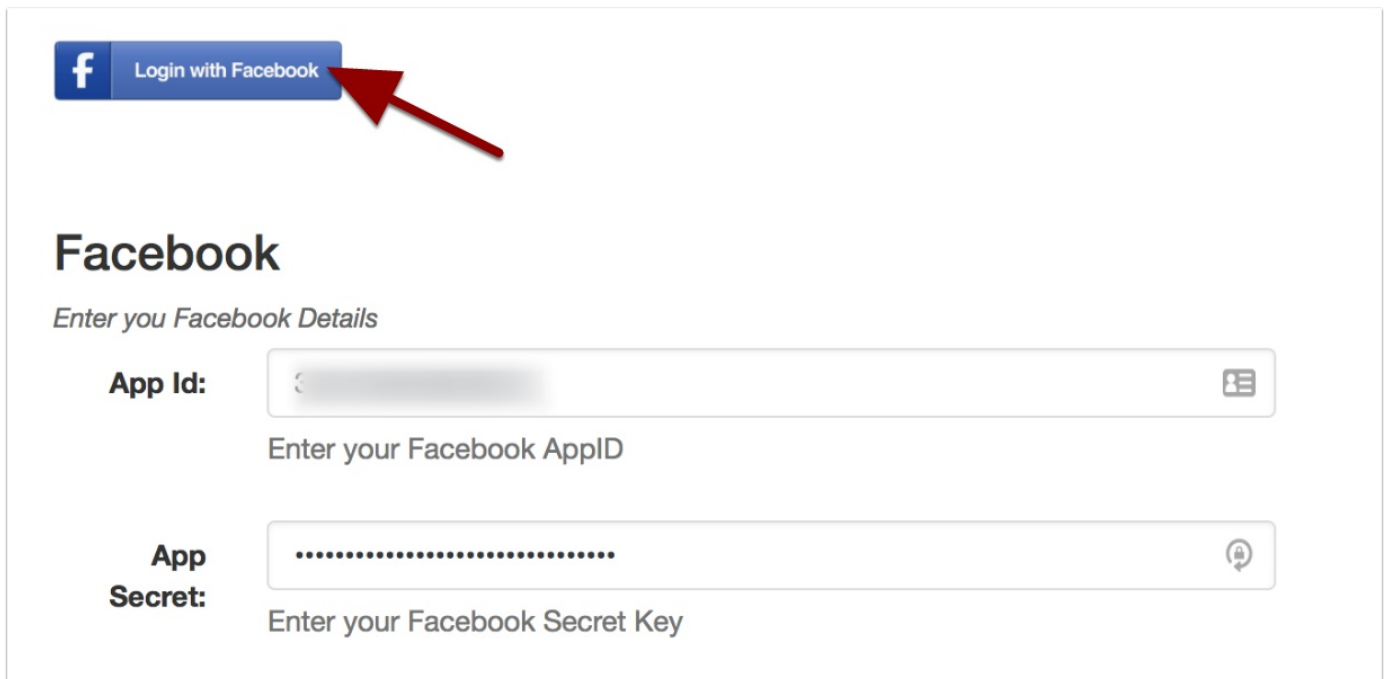
.....

Enter your Facebook Secret Key

Lead Book User Guide

Login To Facebook

After you have entered the app ID and secret, saved the plugin configuration, you will see a button to log in to Facebook at the top. Click that to log in to Facebook. You will then be asked by Facebook to give your app permission. You want to agree to them.



Lead Book User Guide

Logged In To Facebook

After agreeing and giving permission to your app to access your account, you will see this on top of the plugin configuration page.

Facebook

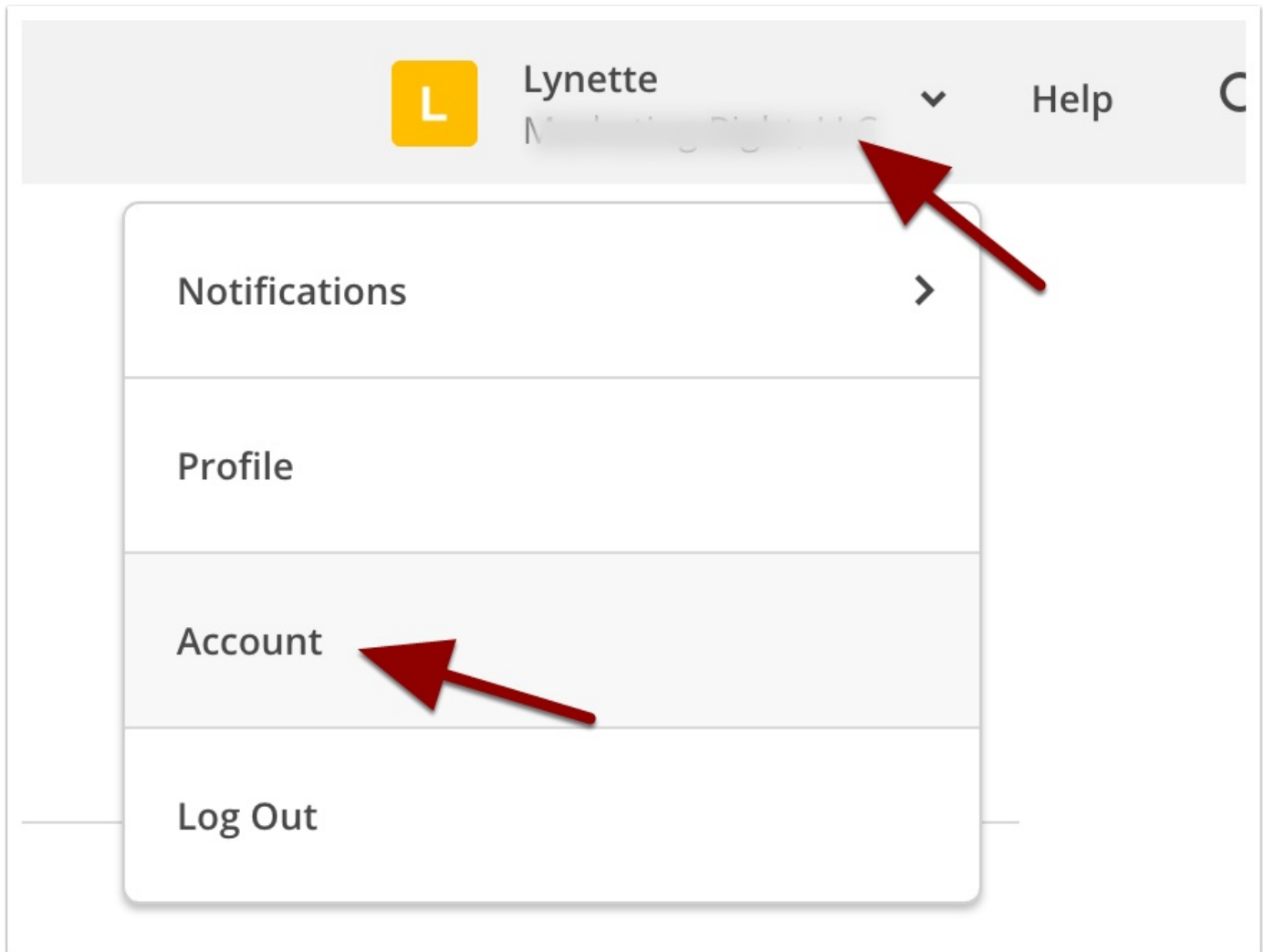
Connected as: Lynette Chandler

[Logout Facebook:](#)

Lead Book User Guide

If Using Mailchimp

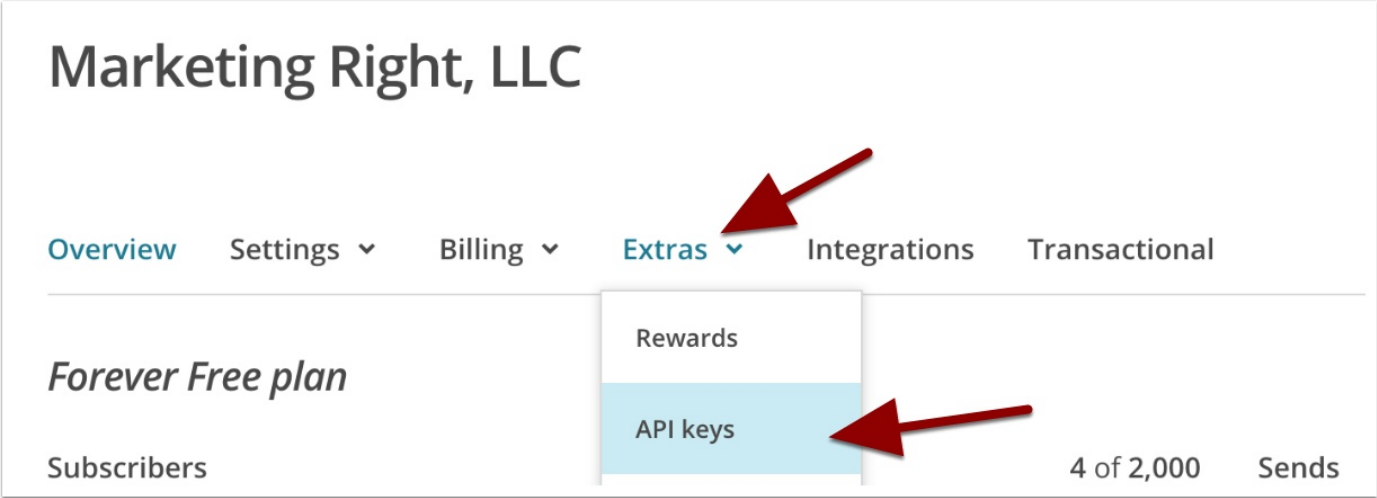
Log into your Mailchimp account, click your name and select the Account option in the drop down.



Lead Book User Guide

API Keys

From your account page, click the Extras tab and then click on API Keys in the drop down.



Lead Book User Guide

Create A Key

Click the Create A Key button to create a new API key if you have never created one.

Your API keys

API keys provide full access to your MailChimp account, so keep them safe. [Tips on keeping API keys secure.](#)

Created	User	Label
Aug 15, 2016 8:29 pm	Lynette Chandler (owner)	none set

Create A KeyCreate A Mandrill API Key

Copy Your API Key

After clicking Create A Key, a key will automatically be created for you and listed on the page. Copy the key as shown.

Your API keys

API keys provide full access to your MailChimp account, so keep them safe. [Tips on keeping API keys secure.](#)

Created	User	Label	API key	QR Code	Status
Feb 24, 2017 9:05 pm	Lynette Chandler (owner)	none set	<div>1.....</div>	QR	<input checked="" type="checkbox"/>

Lead Book User Guide

Enter Your Mailchimp API Key

Go back to the plugin, and paste the API Key in the MailChimp AppKey field

MailChimp

Enter your MailChimp Details

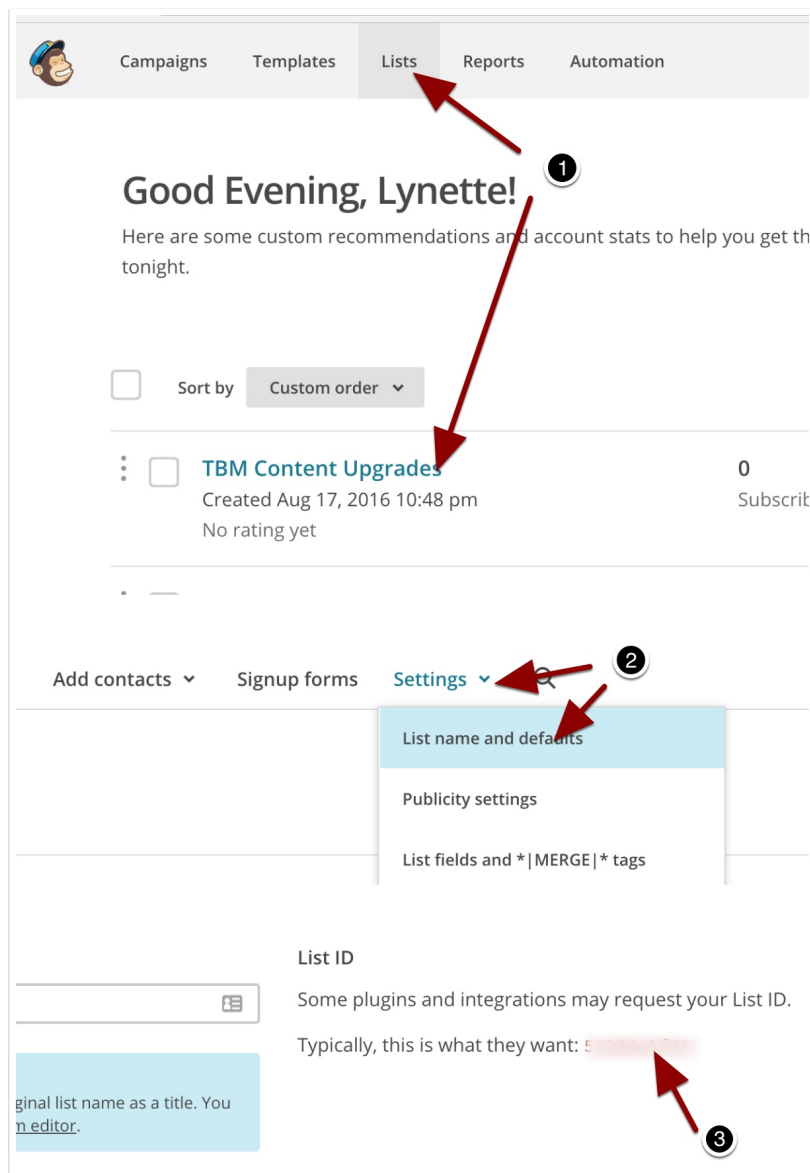
**MailChimp
AppKey:**

Enter MailChimp AppKey

Lead Book User Guide

Get Your List ID

1. After that, click on the Lists tab, then click on the list you want to use with the plugin.
2. Under list Settings, click List name and defaults
3. Copy the list ID



Lead Book User Guide

Enter Your Mailchimp List ID

Return to the plugin and paste the Mailchimp List ID under Form IDs

Form IDs

Enter Form IDs

Facebook:

Enter your Facebook List ID

MailChimp:



Enter your MailChimp List ID

Aweber:

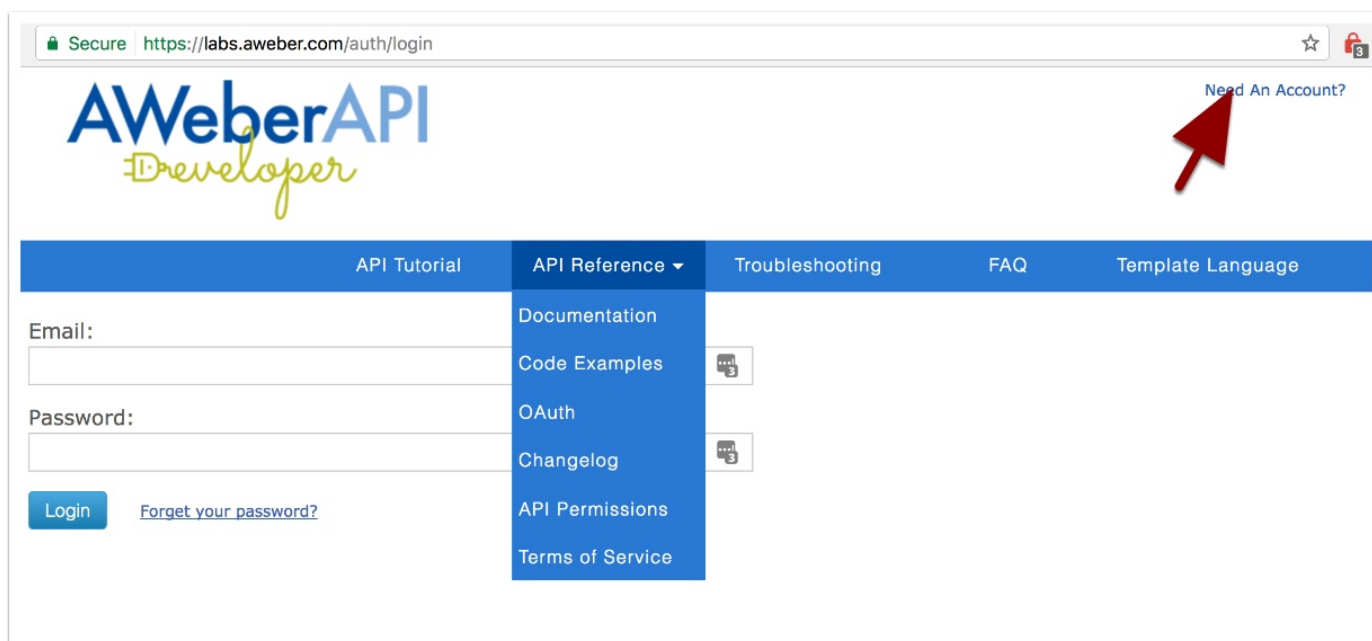
Enter your Aweber List ID

Lead Book User Guide

If Using Aweber

Visit <https://labs.aweber.com> to create an account if you don't have one. Or log in if you have an account.

Note: This is a Developer API account. It has no ties to your Aweber account and is free to create.



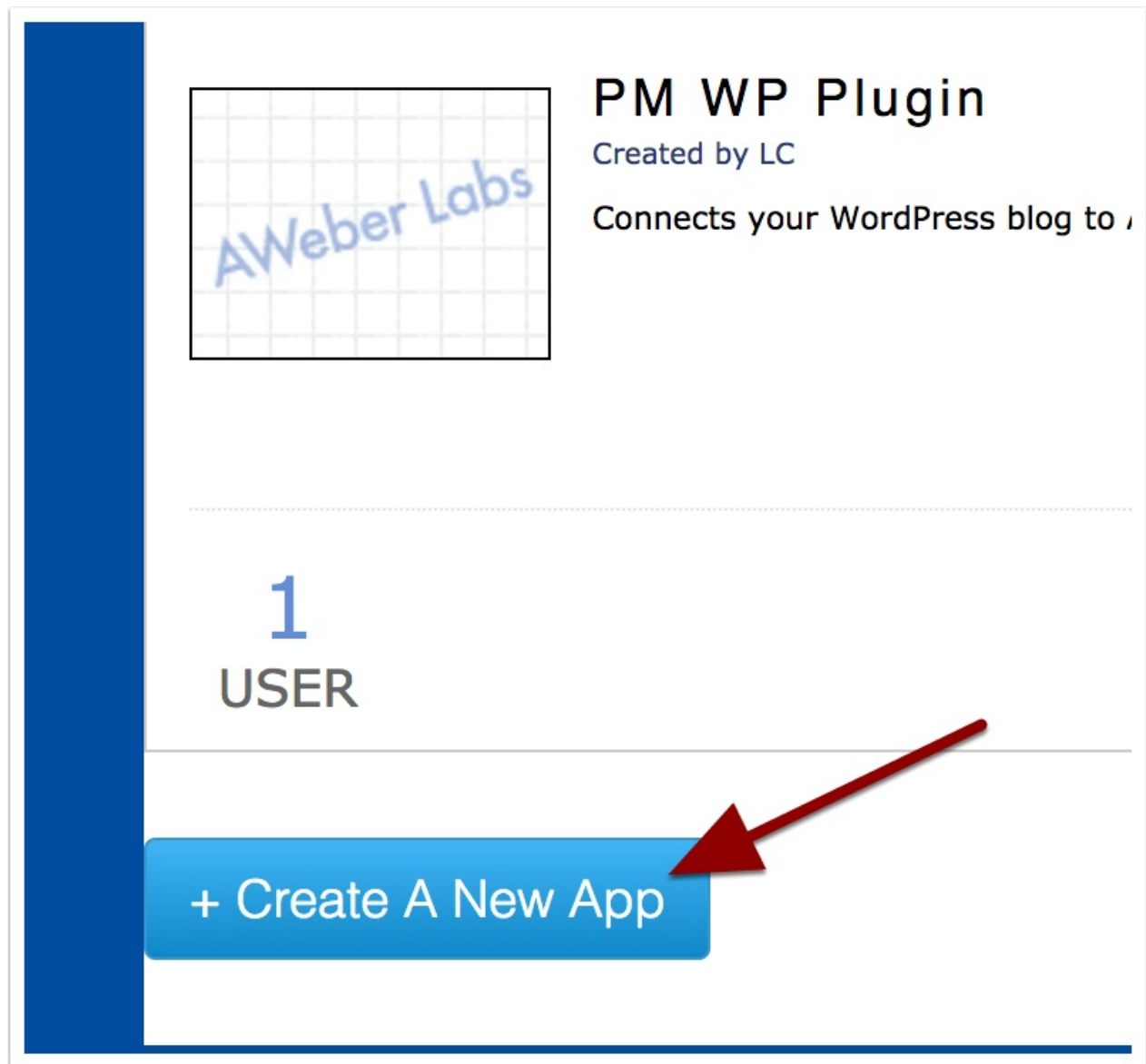
Create A New App

After you have created an Aweber Labs account, log into it. You will see a button to create a new app. Click that.

PS: If you have created an app before, you can re-use your app if you are certain there won't be conflicts. Creating a new app is not required but might be a good idea to keep

Lead Book User Guide

things organized, but you don't have to create a new app for every new site you install the plugin on.



Lead Book User Guide

Complete The New App Creation Form

Enter the information the form requires and click Create New App

App ID: 0a3b5fcd

×

Create A New App

Name

My FB Lead Gen

Description 24 of 235 characters used

Facebook Lead ads plugin

Author

Darth Vader

Website url

http://www.iamyourfather.me

Upload an Image

This image will serve as the icon or logo for your app when it is listed in a customer account.

- Must be PNG, JPEG, or GIF
- Must be 125 x 94 pixels

Choose File

No file chosen

Create New App

Lead Book User Guide

Get Your Keys

After you create the app, you will be given a Consumer Key and a Consumer Secret. Copy those.



The screenshot displays the Facebook Developer console for an application named "My FB Lead Gen". On the left, there is a blue vertical bar with the "AWeber Labs" logo and a "0 USERS" indicator. The main content area shows the app's name, creator ("Darth Vader"), and a link to "Find out more". To the right, the "App ID" is listed as "020a476b". Below this, the "Consumer Key" and "Consumer Secret" are displayed. Two large red arrows point from the text "Consumer Key:" and "Consumer Secret:" to their respective values. The Consumer Key is "AkYwgpAVEvA213A6hH3iIrLX" and the Consumer Secret is "17qBe5R0ZgVsn3WBLnljOY9LJTCkxY7n6VKeQIZt". A wrench and screwdriver icon is visible on the right side of the console.

Field	Value
App ID	020a476b
Consumer Key	AkYwgpAVEvA213A6hH3iIrLX
Consumer Secret	17qBe5R0ZgVsn3WBLnljOY9LJTCkxY7n6VKeQIZt

Lead Book User Guide

Paste Your Aweber Keys Into The Plugin

In the Aweber keys field, paste your consumer key and consumer secret. Then save.

Aweber

Enter you Aweber Details

**Consumer
Key:**

Enter Consumer Key

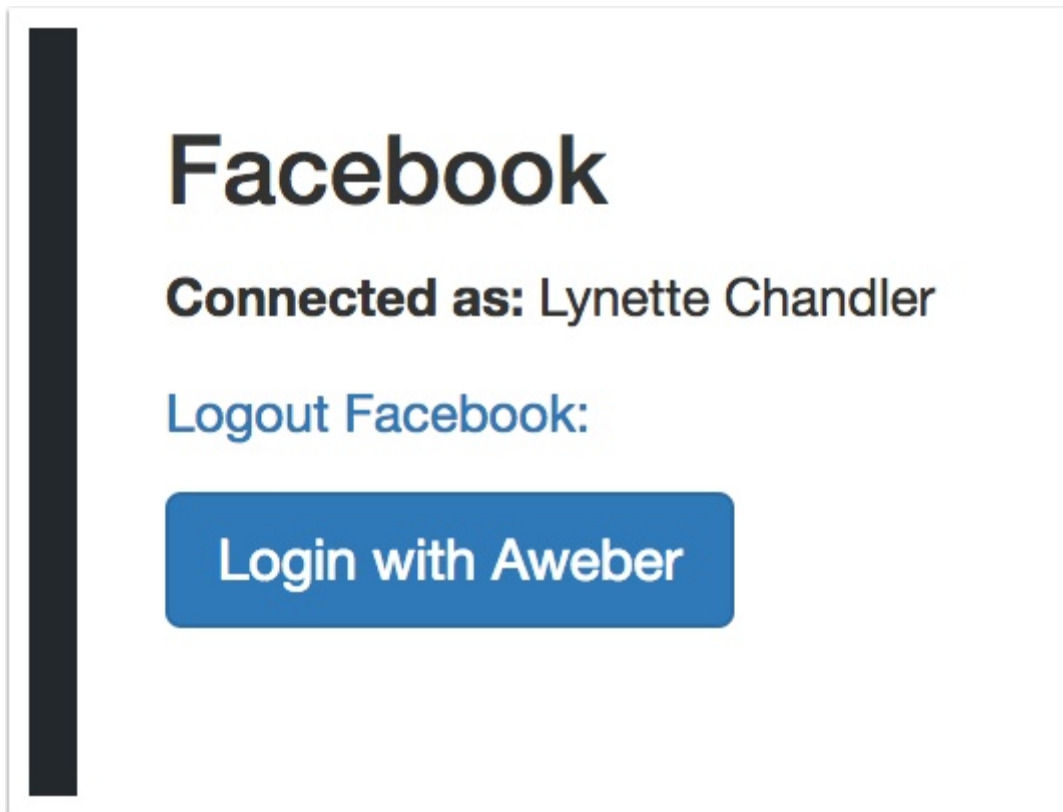
**Consumer
Secret:**

Enter your Consumer Secret

Lead Book User Guide

Login With Aweber

After saving the Aweber keys, you will see a new button to log in to Aweber at the top. Click that.



Lead Book User Guide

Log In To Aweber

You will be taken to Aweber. You will now log in with your regular Aweber autoresponder account credentials. Click Allow Access.



Sign in to give **PM WP Plugin** by **LC** access to your AWeber account. It will access the following:

- Account information such as Lists, Messages, and Subscribers (except Subscriber Email, Name, IP Address and Additional Notes)

LOGIN NAME



PASSWORD



Allow Access

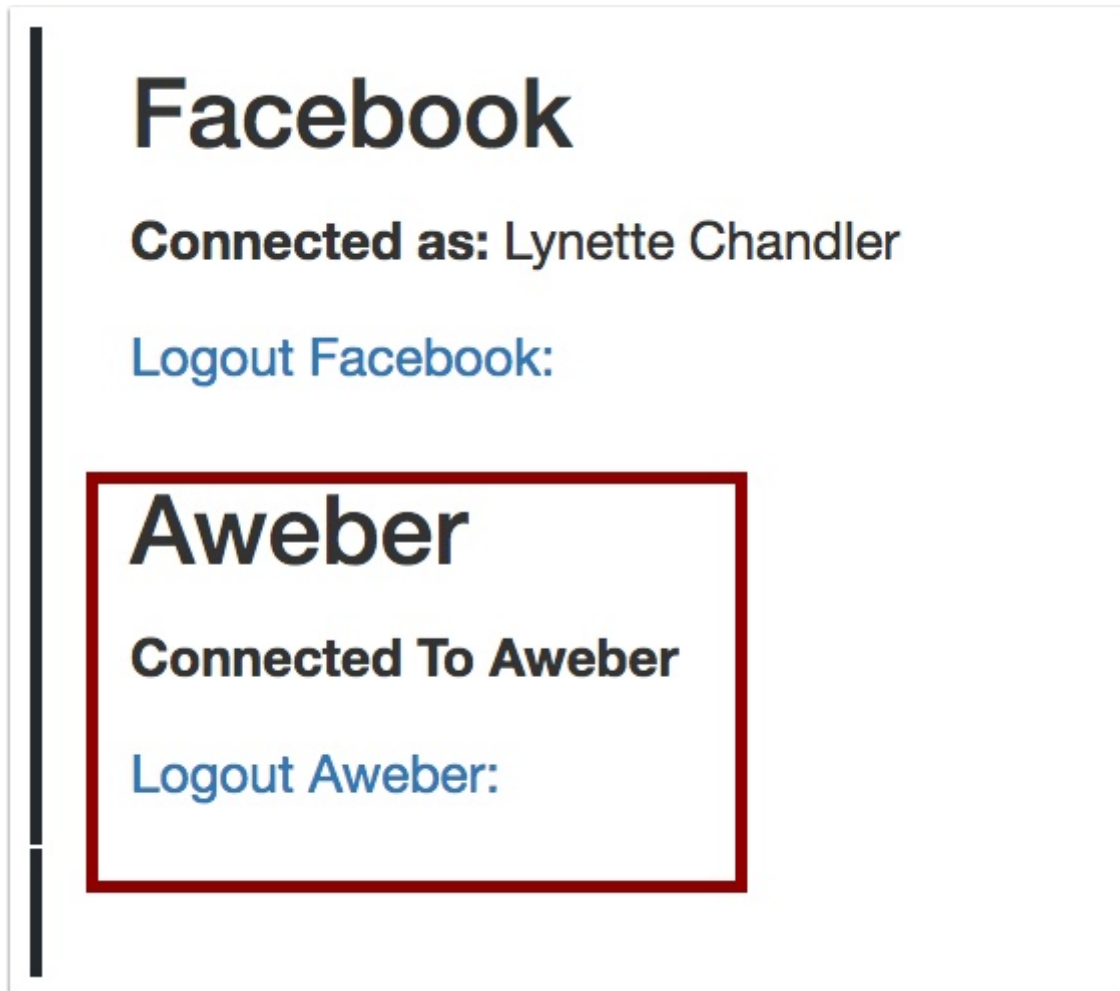
[Deny](#)

[Permissions Policy](#)

Lead Book User Guide

Logged Into Aweber

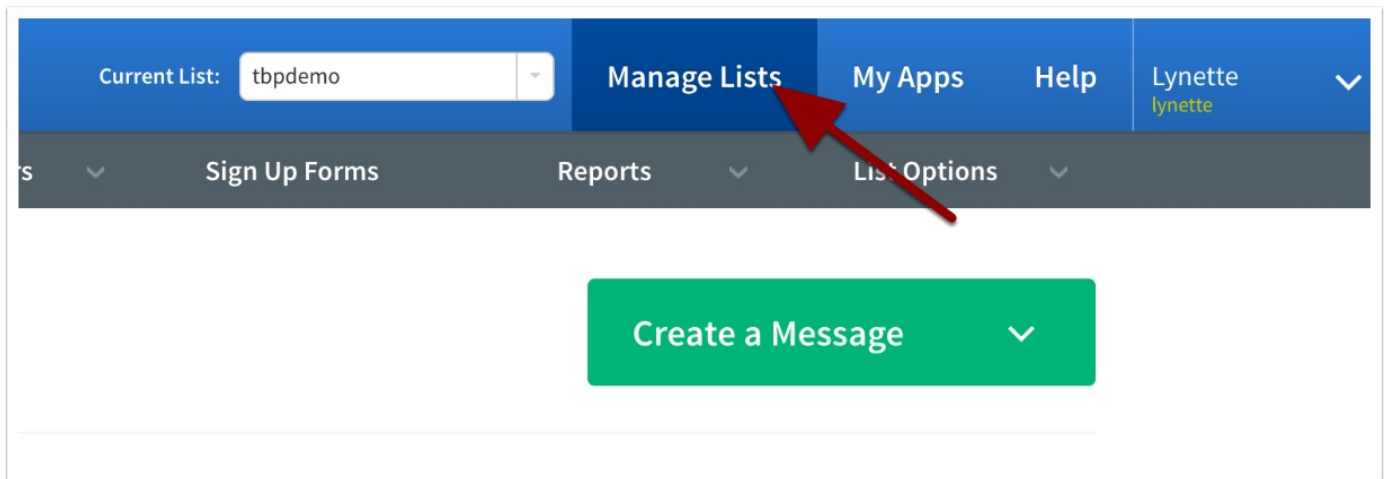
Once you have done that, when you return to your plugin, you will see this to confirm you are connected to Aweber.



Lead Book User Guide

Get Your Aweber List ID

Now, go back to your Aweber account, click Manage Lists



Lead Book User Guide

Locate Your List

- 1. Find the list you want to use with the plugin, then hover over the Deactivate button
- 2. You should see a URL at the bottom of your browser. The last portion of the URL is the List ID that you need.

List Name	Status	Subscribers	Unsubscribes	Action
Technology Content	Active	55	1	Deactivate
Customers	Active	120	3	Deactivate
Pages	Active	0	0	Deactivate
	Active	92	6	Deactivate
Customer list for TechBasedTraining.com	Active	136	1	Deactivate

Browser URL: <https://www.aweber.com/users/lists/deactivate/1101936/2>

Lead Book User Guide

Paste Your Aweber List ID

Return to your plugin configuration page, paste your Aweber List ID

Form IDs

Enter Form IDs

Facebook:

Enter your Facebook List ID

MailChimp:

Enter your MailChimp List ID

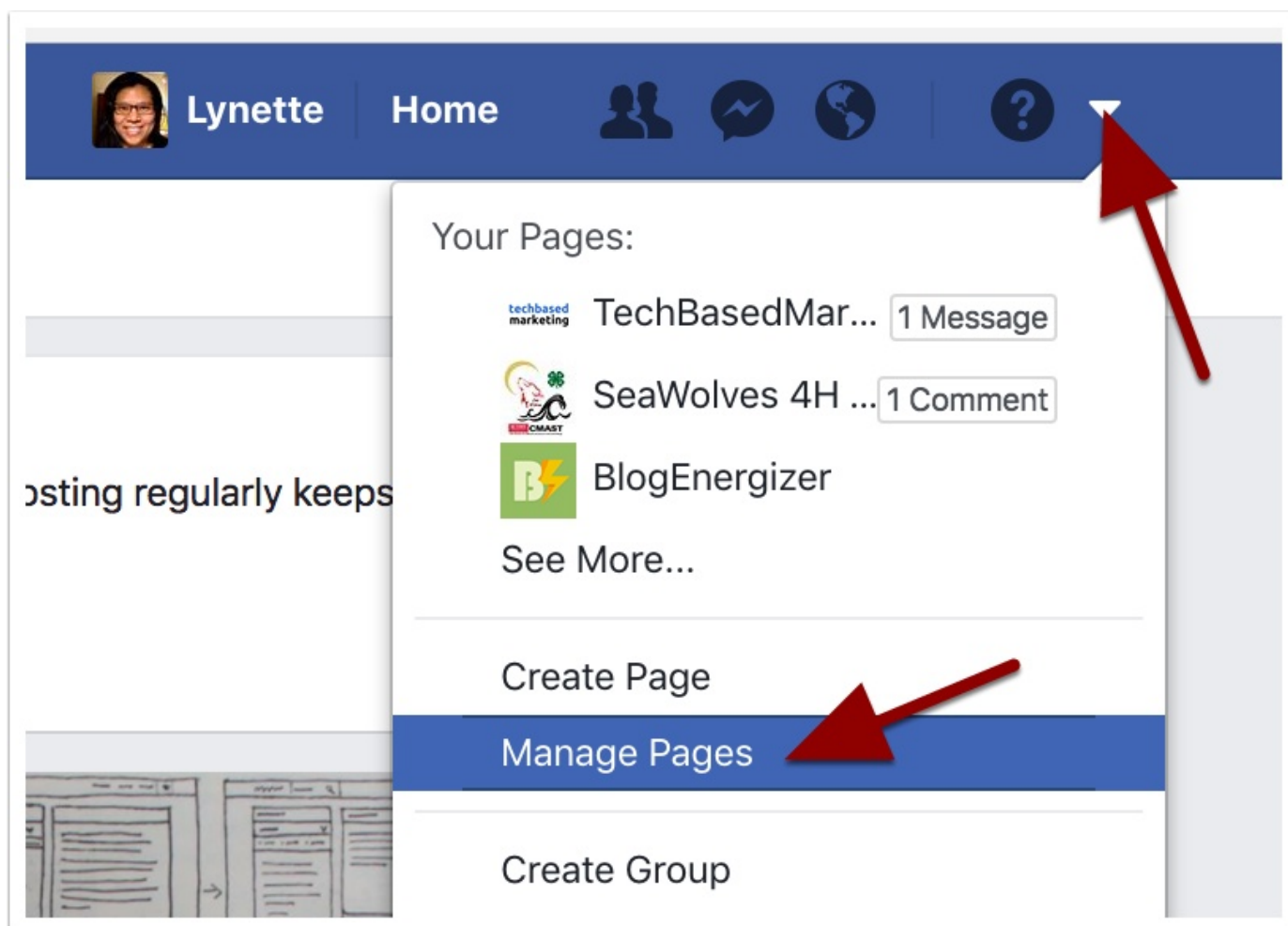
Aweber:

Enter your Aweber List ID

Lead Book User Guide

Creating A Lead Ad Form

Lead ad forms are linked to Pages that you are admin of. Log into Facebook, click Manage Pages to get to a list of pages you manage. Locate the page you want to create the form for and click on it.



Lead Book User Guide

Publishing Tools

After you go to your page, click Publishing Tools



Lead Book User Guide

Go to Forms Library

Next, click on Forms Library to the left of the page located under the Lead Ads Forms heading.

Videos

Video Library

Videos You Can Crosspost


Lead Ads Forms


Forms Library


Draft Forms Library


Leads Setup


Canvas

☐Work Hard

☐International

☐National C

☐National C

☐Golden GI TV Drama

Lead Book User Guide

Create A Form

Click the +Create button

Insights

Publishing Tools

Settings

Help

Leads will be available for download for up to 90 days from the time they are submitted by a user. Connect your page to a CRM to access your leads instantly, making it easier for you to contact potential customers quickly.
[Connect your CRM.](#)

Forms Library

Search...

Actions

Filters

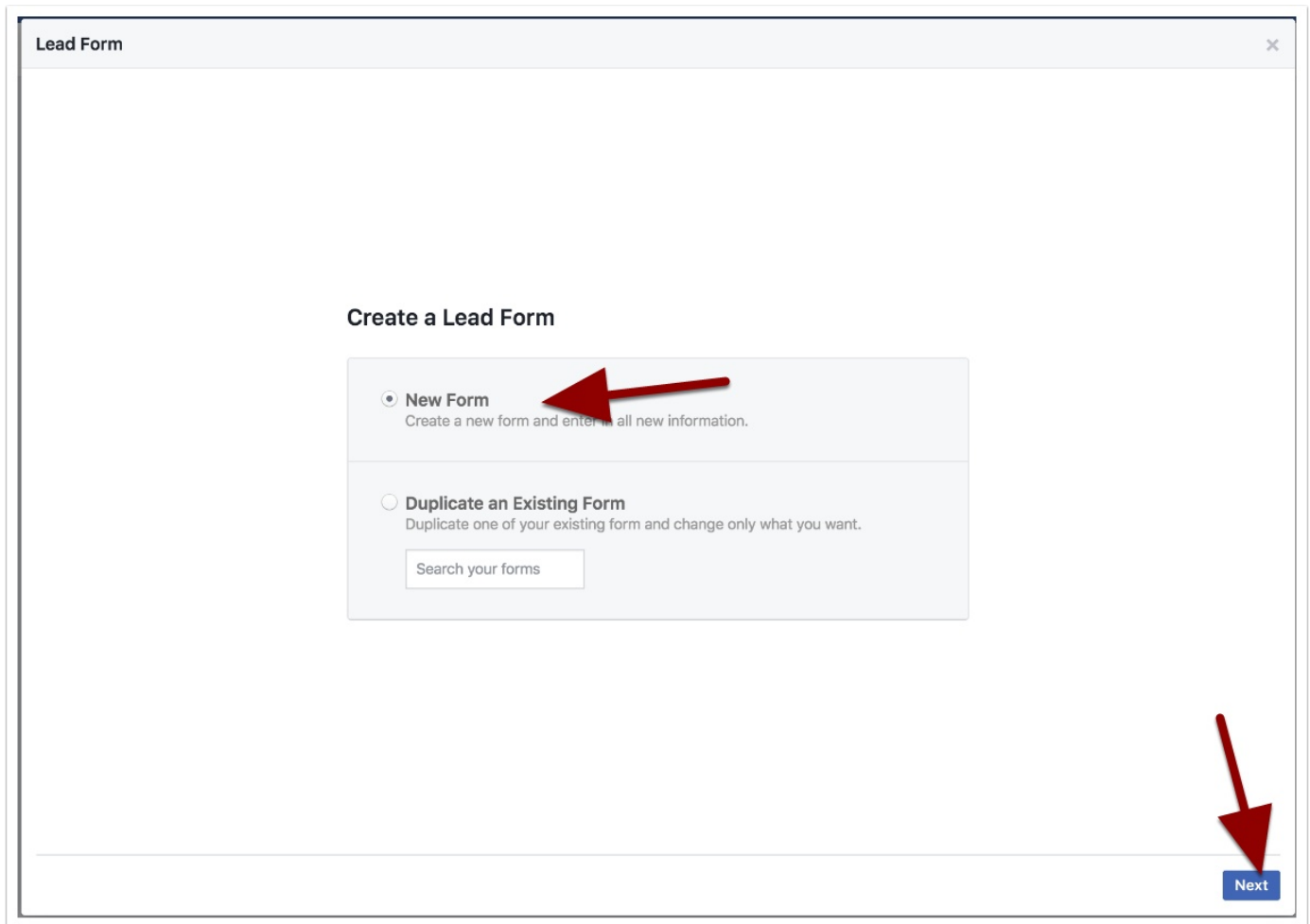
	Name	Locale	Status	Created	Leads Count	Leads
<input type="checkbox"/>	LeadBook2 (Preview)	English (US)	Active	Jan 20, 2017 at 1:48pm Lynette Chandler	1 (0 expired)	Download
<input type="checkbox"/>	LeadBook (Preview)	English (US)	Active	Jan 20, 2017 at 1:42pm Lynette Chandler	1 (0 expired)	Download



Lead Book User Guide

Create A New Form

Now you can choose to create a new form or duplicate an existing form if you have created one before. Click Next.



The screenshot shows a window titled "Lead Form" with a close button (X) in the top right corner. The main content area is titled "Create a Lead Form". Below this title, there are two radio button options. The first option, "New Form", is selected and has a red arrow pointing to it. Its description is "Create a new form and enter in all new information." The second option, "Duplicate an Existing Form", is not selected. Its description is "Duplicate one of your existing form and change only what you want." Below this second option is a text input field labeled "Search your forms". At the bottom right of the window, there is a blue button labeled "Next" with a red arrow pointing to it.

Lead Form

Create a Lead Form

☒ **New Form**
Create a new form and enter in all new information.

☐ **Duplicate an Existing Form**
Duplicate one of your existing form and change only what you want.

Search your forms

Next

Lead Book User Guide

Setup Your Welcome Screen

If you want your form to display a welcome screen before they enter their information, you'll want to turn the welcome screen on and complete the form by giving it headline, image, a short description and button text. The welcome screen is optional.

The screenshot displays the 'Lead Form' configuration window. At the top, there's a 'Plugin Demo' label and 'Save' and 'Finish' buttons. The 'Content' tab is active, showing the 'Welcome Screen (optional)' section with a toggle switch turned on. Below this, the 'Headline' field is set to 'Briefly describe what people will receive (Required)' with a character count of 60. The 'Image' section offers two options: 'Use the image from your ad' (which would use the ad image) and 'Use uploaded image' (selected, with a recommended size of 1200 x 628 pixels and an 'Upload Image' button). The 'Layout' is set to 'Paragraph' with a text area for 'Enter text that tells people about your product or service (Required)'. The 'Button' field is set to 'Example: Sign Up Now (Required)' with a character count of 30. At the bottom, there are expandable sections for 'Questions' and 'Privacy Policy'. On the right, the 'Form Preview' shows a visual representation of the welcome screen with a placeholder for an image, the text 'Forms Library', 'Headline Text', and a blue button labeled 'Button Text'. A progress indicator at the bottom right shows 'Welcome Screen' as the first of three steps.

Lead Book User Guide

Questions

Next, click on Questions and make sure the Email and Full name is checked. It should be by default.

☐ Welcome Screen (optional)

☒ Email☒ Full name

What information would you like to ask for?

User Information ⓘ

Show more options

+ Add custom question

Lead Book User Guide

Privacy Policy

A privacy policy is required by Facebook. You'll want to enter the URL to your website's privacy policy here or click the Add custom disclaimer to enter a disclaimer.

Questions

○ Privacy Policy

Because you will be collecting customer information, you need to include a link to your company's privacy policy. Your link will appear with Facebook's default privacy disclaimer.

Link Text

Privacy63

Link URL

http://www.iamyourfather.me/privacy

Custom Disclaimer

You can add additional notices like marketing opt-ins and legal disclaimers to the default Facebook privacy disclaimer.

☐

Add custom disclaimer

Lead Book User Guide

Thank You Screen

Click the Thank You Screen tab and enter a URL to your thank you page.

Then click Finish. If you are not using a Welcome Screen, be sure to toggle the Welcome Screen off before you click Finish.

The screenshot shows the 'Lead Form' configuration window. The 'Content' tab is active, displaying a list of form sections: 'Welcome Screen (optional)', 'Questions', 'Privacy Policy', and 'Thank You Screen'. The 'Thank You Screen' section is expanded, showing a 'Website Link' field with the URL 'http://www.iamyourfather.me/specialoffer'. A red arrow points to the 'Finish' button in the top right corner. Another red arrow points to the 'Welcome Screen' toggle switch, which is currently turned off. A third red arrow points to the 'Website Link' input field.

Lead Form

Plugin Demo

Content Settings

☐ Welcome Screen (optional)

☐ Questions

☐ Privacy Policy

☐ Thank You Screen

Once a person has completed your form, you can prompt them to visit your site.

Website Link

Save Finish

Form Preview

A preview of your image will appear here.

Forms Library

Thanks, you're all set.

Your info has been sent to Forms Library.
Tap below to visit Forms Library.

Lead Book User Guide

Obtain Your Form ID

After creating your Lead Ad Form, hover over the form name and you will see a popup with the Form ID. Copy the Form ID.

Forms Library

Search...

Actions ▾

<input type="checkbox"/>	Name	Locale	Status	Created
<input type="checkbox"/>	Untitled form 2017-02-24 (Preview)			Feb 24, 20 Lynette Ch
<input type="checkbox"/>	LeadBook2 (Preview)			Jan 20, 20 Lynette Ch

Form Details

Form ID: 274914286262927

Form name: Untitled form 2017-02-24

Lead Book User Guide

Return To The Plugin

And enter your Facebook Form ID in the Facebook field under Form IDs

Form IDs

Enter Form IDs

Facebook:
Enter your Facebook List ID

MailChimp:
Enter your MailChimp List ID

Aweber:
Enter your Aweber List ID

Configure Cron Settings

Cron settings help the plugin automatically retrieve the form data from Facebook to send them to Aweber or Mailchimp. Select how often you want the cron to run and

Lead Book User Guide

select if you want to use MailChimp or Aweber. You could technically do both if that is what you want but not necessary.

IMPORTANT! This feature relies on WordPress's built in scheduler which in turn is triggered by traffic. If your site is new or has no regular traffic going to it, cron will not get triggered and won't run.

Cron Settings

-

Cron Interval:

✓ hourly

twicedaily

daily

MailChimp:

☒ Enable MailChimp Cron

Aweber:

☒ Enable Aweber Cron

Save Settings

Manually Push Leads To Your Email Service

1. Sometimes you may want to manually trigger the sending of leads to your email service provider. You can do that by going to the Mailchimp Integration tab or Aweber Integration tab. Then click Check Leads.

Lead Book User Guide

2. If there are new leads collected, you should see a number under Total leads. Click the Import Leads button to send them to your email service. If a lead already exists on the list, it will be ignored.

The screenshot shows the WordPress dashboard with the 'Lead Book' menu item highlighted. The 'MailChimp Integration' settings page is open, displaying fields for 'MailChimp Form', 'Form ID', 'Last Cron Run', 'Next Cron Run', 'Download Link', 'Date', 'Total Leads', and 'New Leads Imported'. A 'Check Leads' button is visible. Below the settings, a table shows the current status of the integration. The table has two rows: 'Date' with the value '02/25/2', and 'Total Leads' with the value '1'. The 'New Leads Imported' row shows a value of '-'. At the bottom of the table, there are two buttons: 'Check Leads' and 'Import Leads'. Red arrows and numbered circles highlight the 'Check Leads' button (labeled 1) and the 'Import Leads' button (labeled 2).

Date	Total Leads	New Leads Imported
02/25/2	1	-