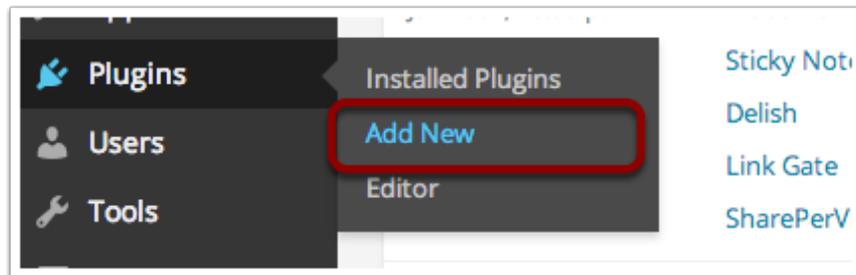


# Lead Book User Guide

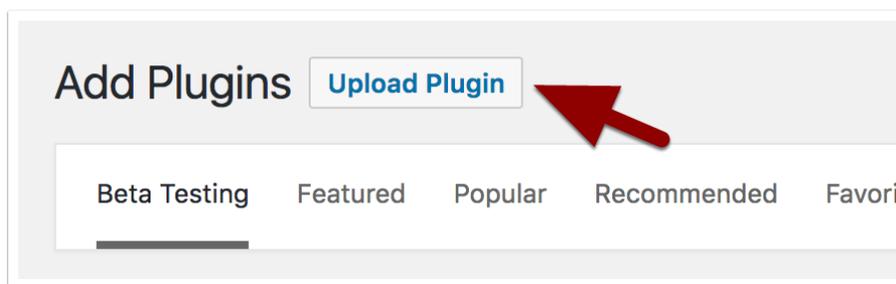
## Installing A Plugin

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



## Upload plugin

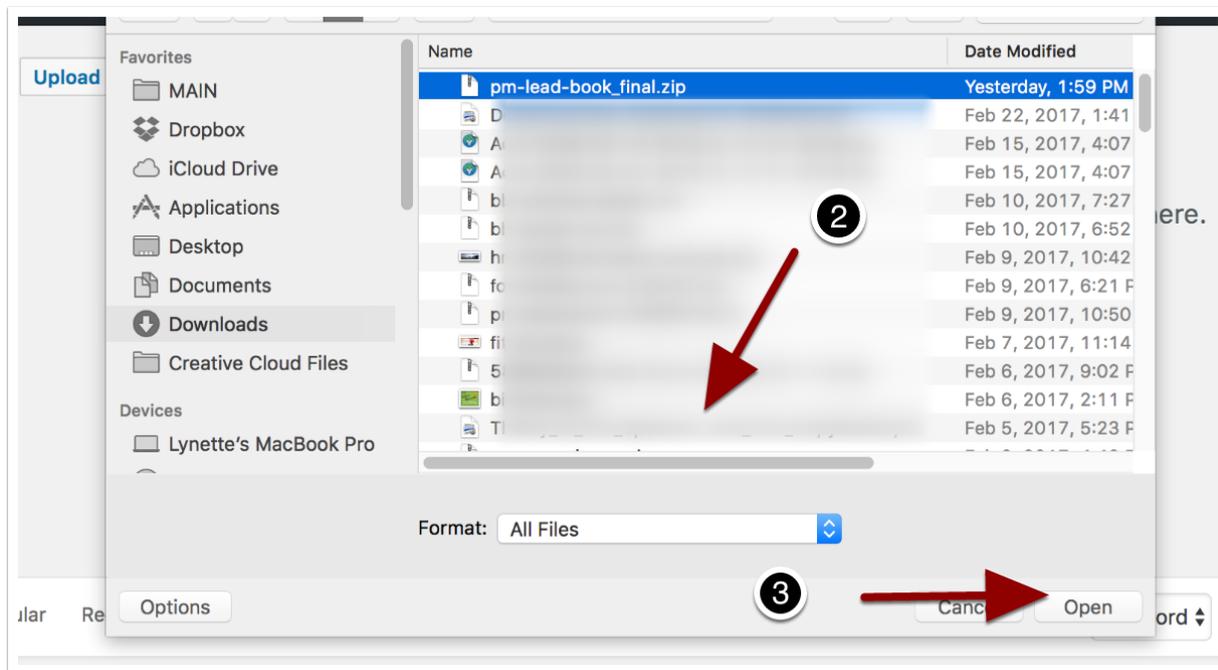
Click Upload Plugin



# Lead Book User Guide

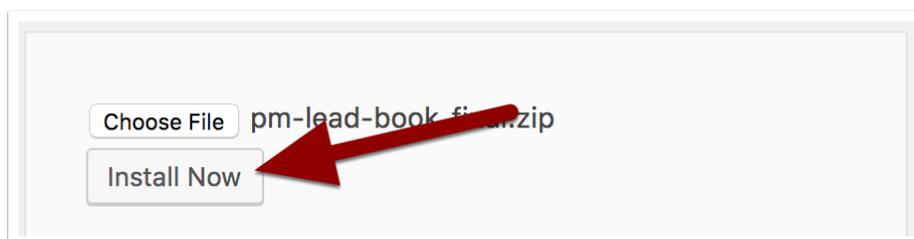
## Choose Upload File

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



## Install The Plugin

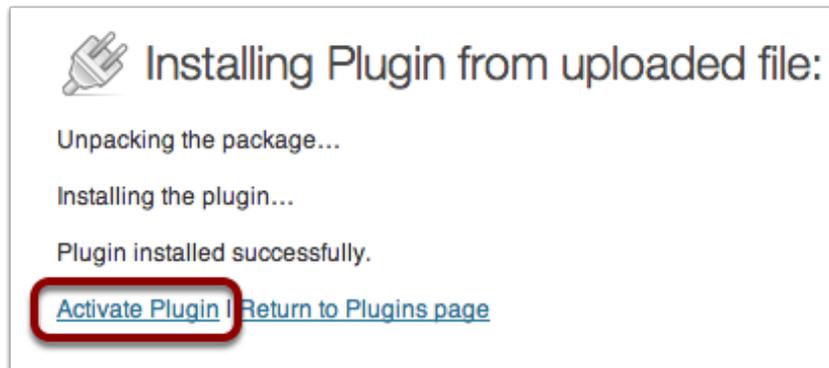
Click Install Now



# Lead Book User Guide

## Activate The Plugin

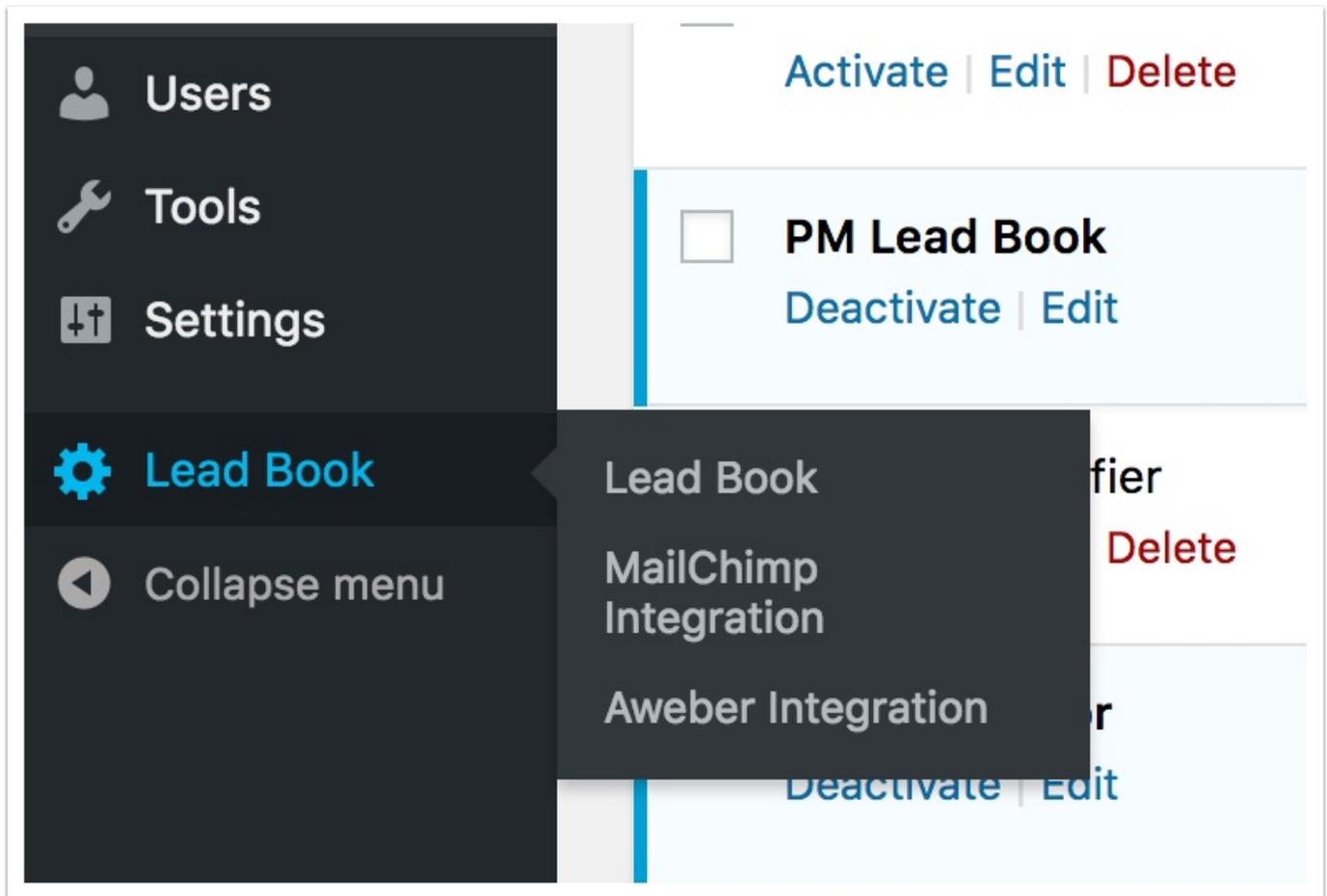
After successfully unpacking and installing the plugin, click *Activate Plugin*.



# 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 your Facebook Details*

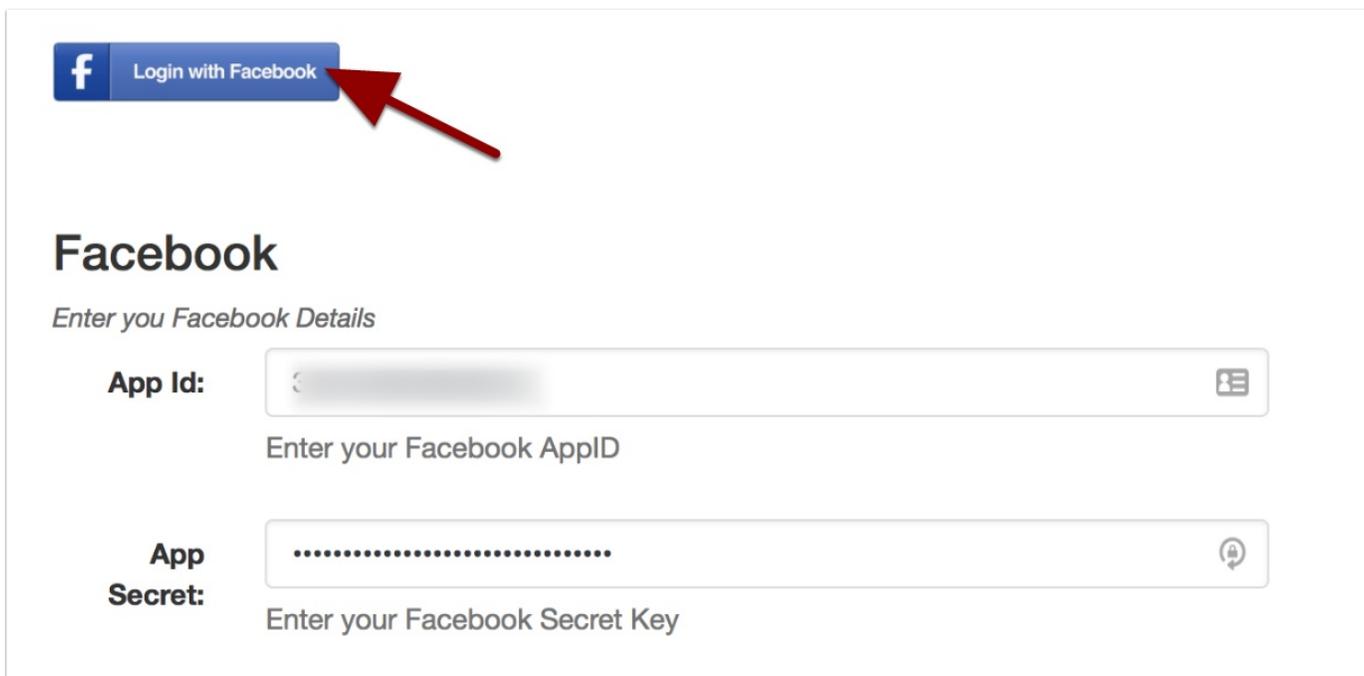
**App Id:**   
Enter your Facebook AppID

**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.



**f** Login with Facebook

### Facebook

*Enter your Facebook Details*

**App Id:**

Enter your Facebook AppID

**App Secret:**

Enter your Facebook Secret Key

# 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**

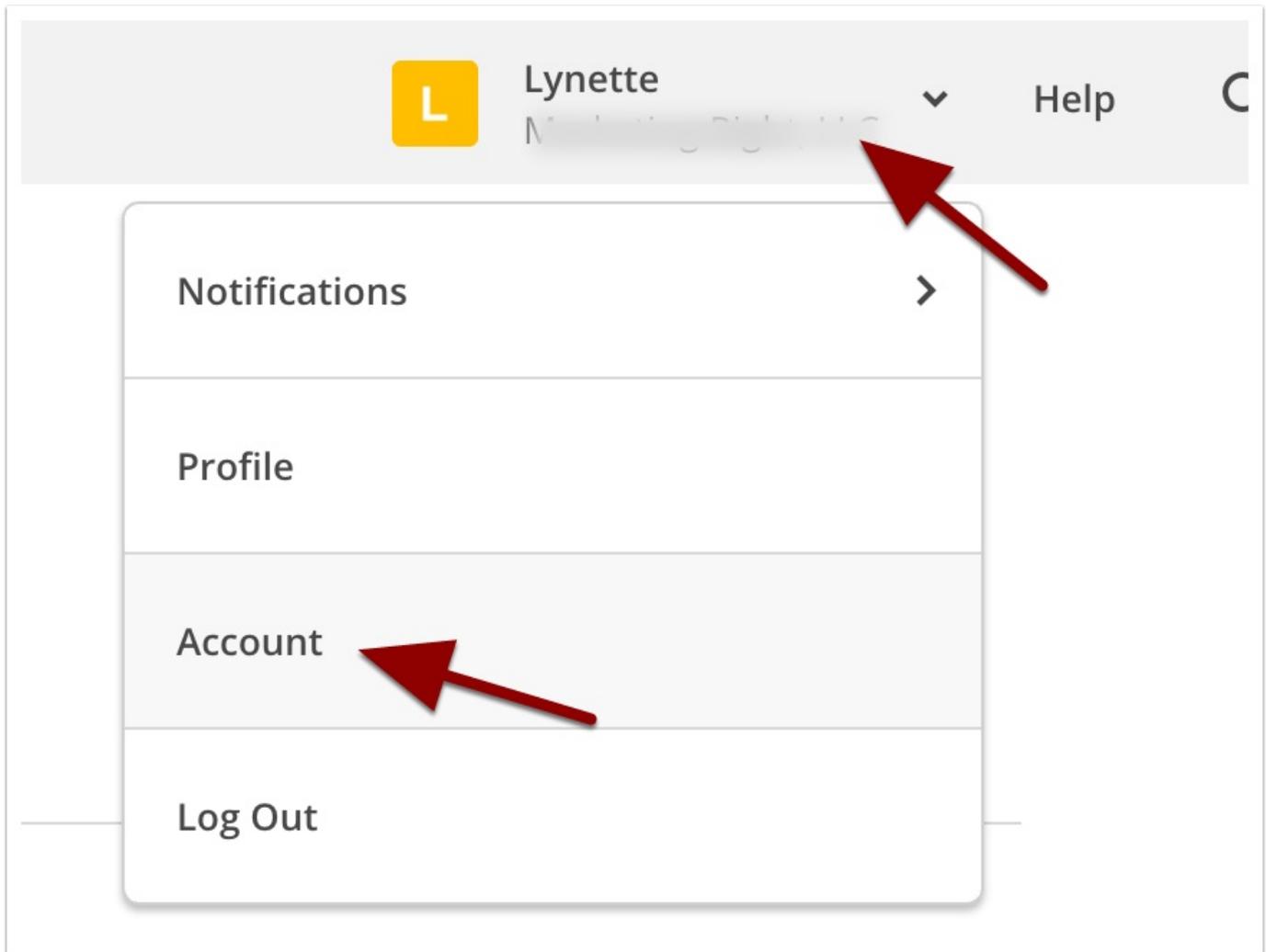
**Connected as:** Lynette Chandler

[Logout Facebook:](#)

# Lead Book User Guide

## If Using Mailchimp

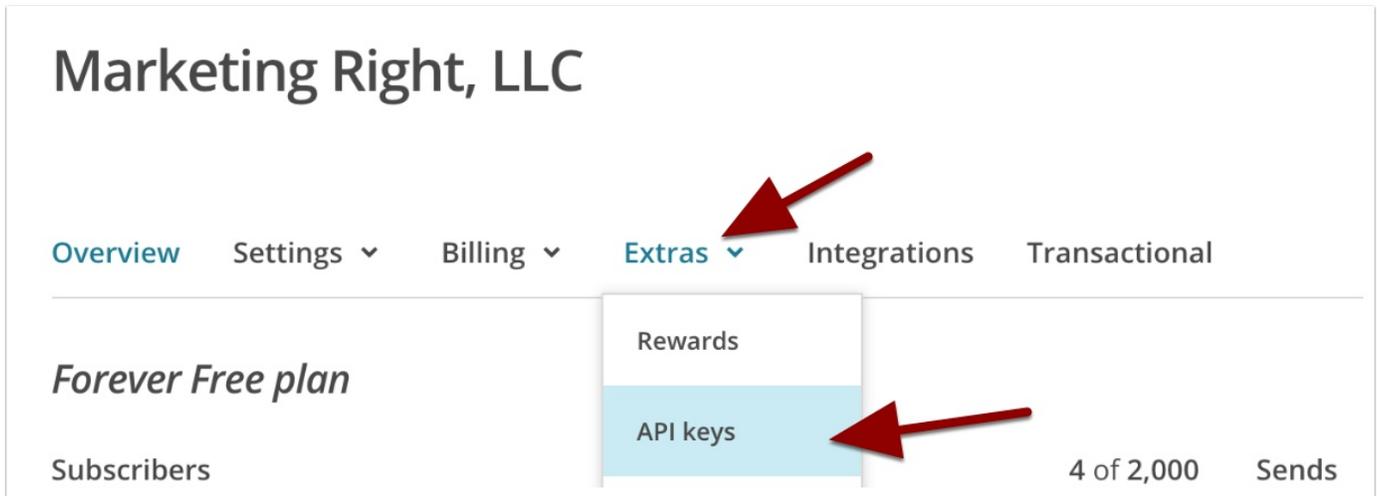
Log into your Mailchimp account, click your name and select the Account option in the drop down.



# 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 Key**    Create 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	 1. ....	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*

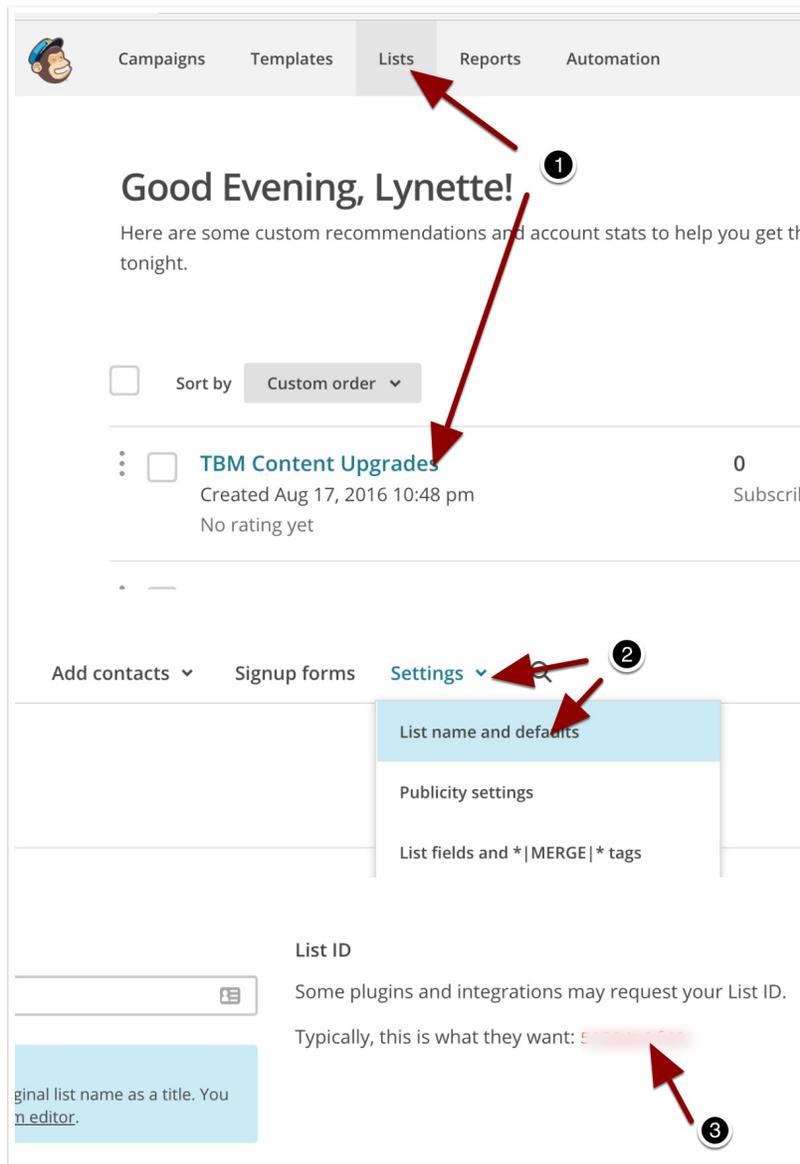
**MailChimp AppKey:**

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:**

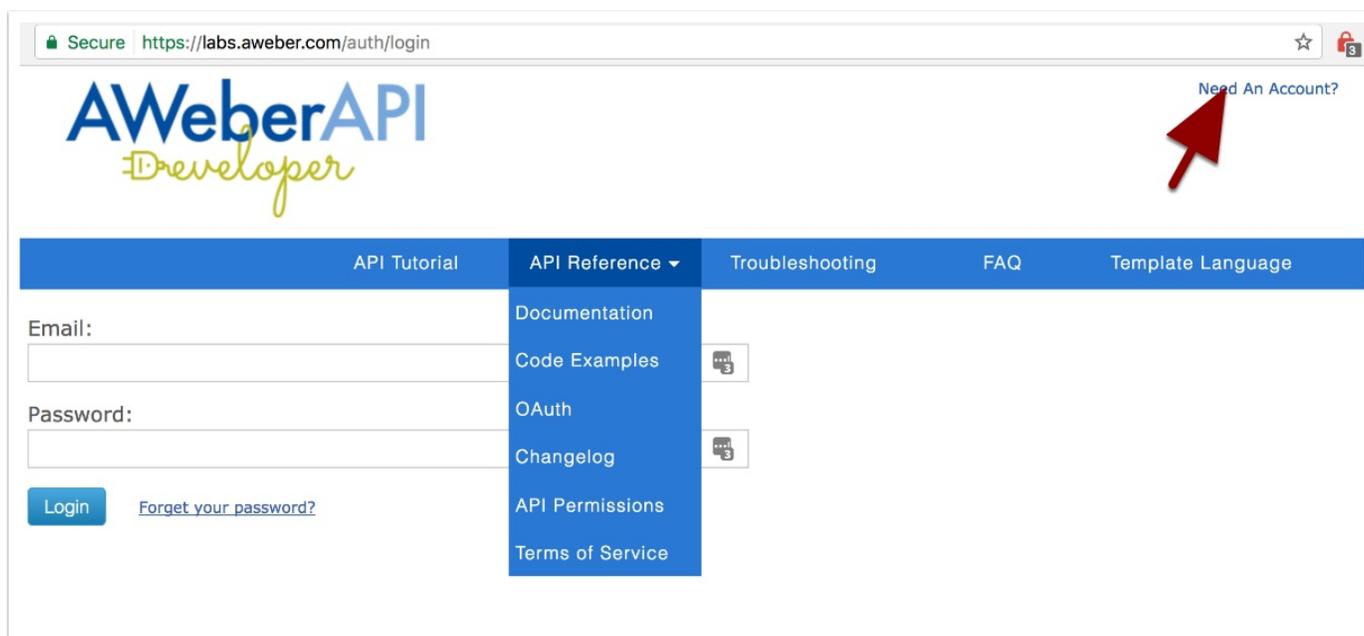
Enter your Aweber List ID

# 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

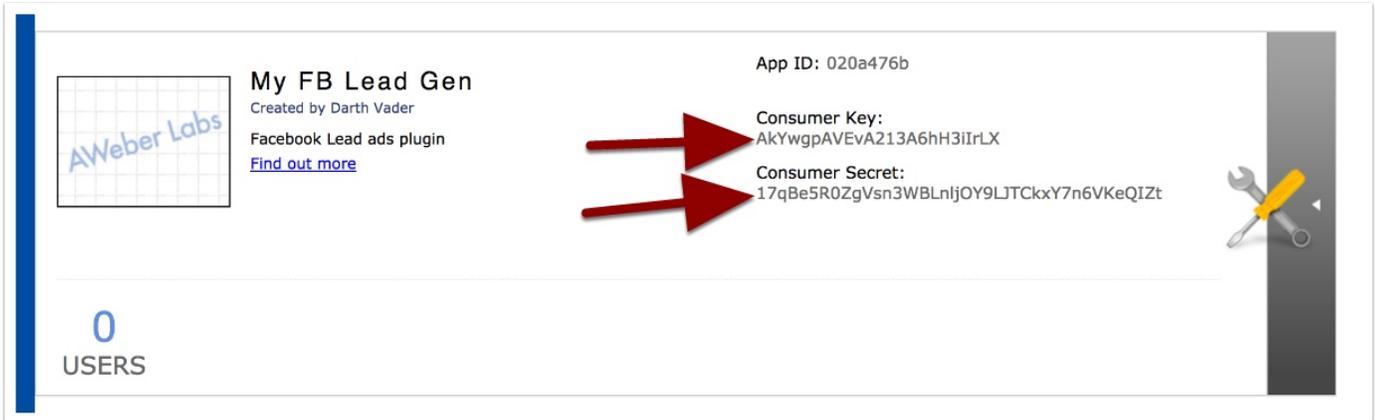
Choose File No file chosen

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 shows the Facebook App Settings page for an application named "My FB Lead Gen". The app is created by "Darth Vader" and is a "Facebook Lead ads plugin". A link "Find out more" is provided. The app ID is "020a476b". The Consumer Key is "AkYwgpAVEvA213A6hH3iIrLX" and the Consumer Secret is "17qBe5R0ZgVsn3WBLnljOY9LJTCkxY7n6VKeQIZt". Two red arrows point to the Consumer Key and Consumer Secret fields. The app has 0 users. A wrench and screwdriver icon is visible on the right side of the settings page.

	<b>My FB Lead Gen</b> Created by Darth Vader Facebook Lead ads plugin <a href="#">Find out more</a>	App ID: 020a476b
		Consumer Key: AkYwgpAVEvA213A6hH3iIrLX
		Consumer Secret: 17qBe5R0ZgVsn3WBLnljOY9LJTCkxY7n6VKeQIZt
0 USERS		

# 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*

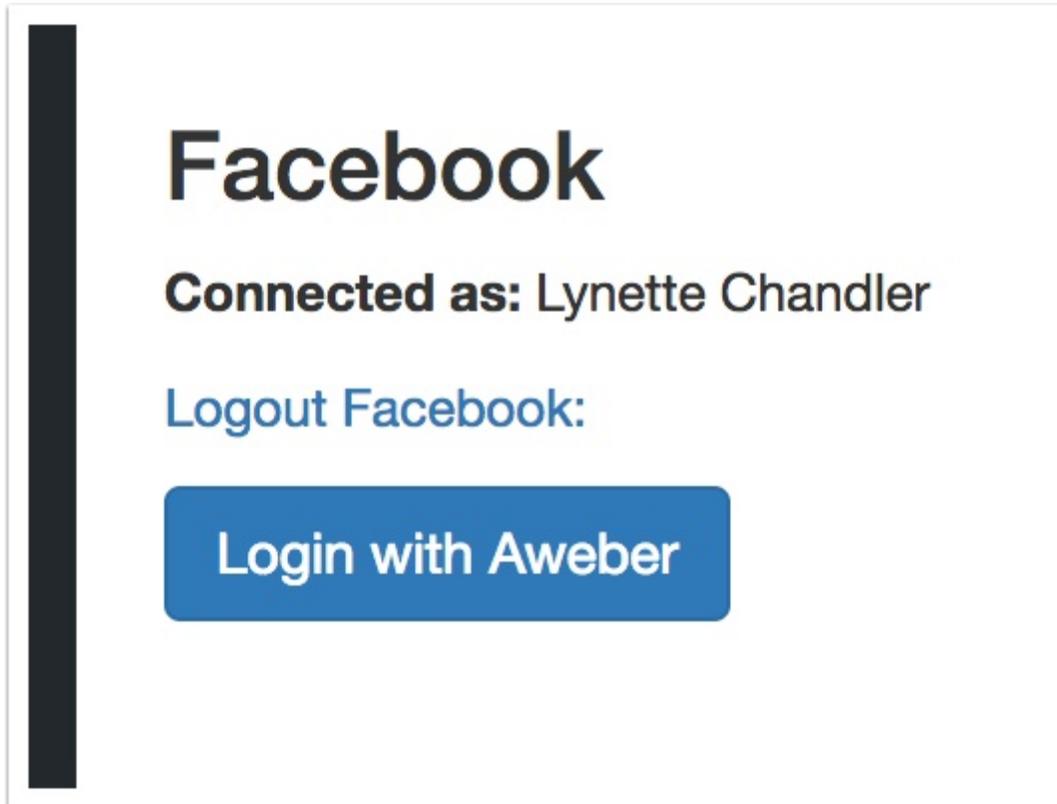
**Consumer Key:**   
Enter Consumer Key

**Consumer Secret:**   
Enter your Consumer Secret

# Lead Book User Guide

## Login With Aweber

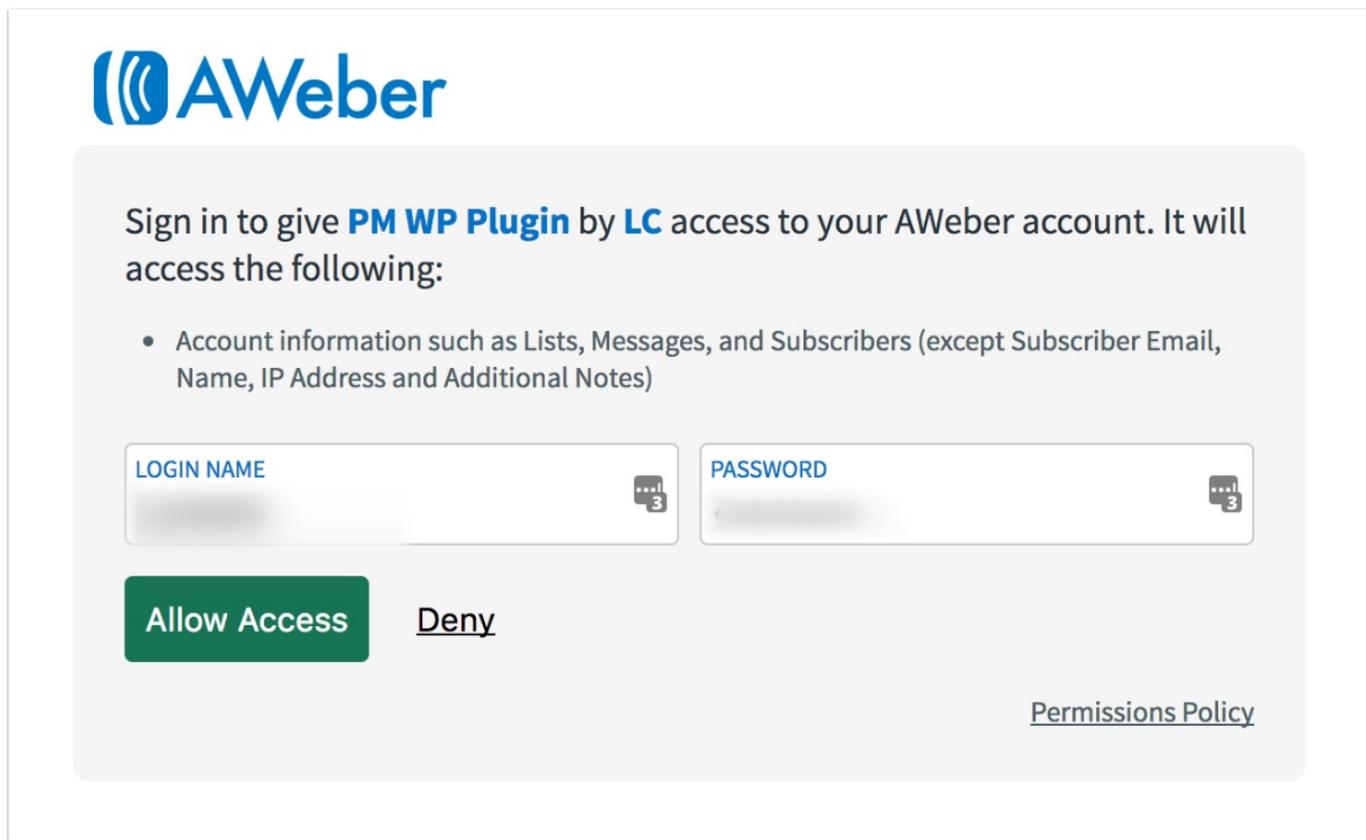
After saving the Aweber keys, you will see a new button to log in to Aweber at the top. Click that.



# 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 

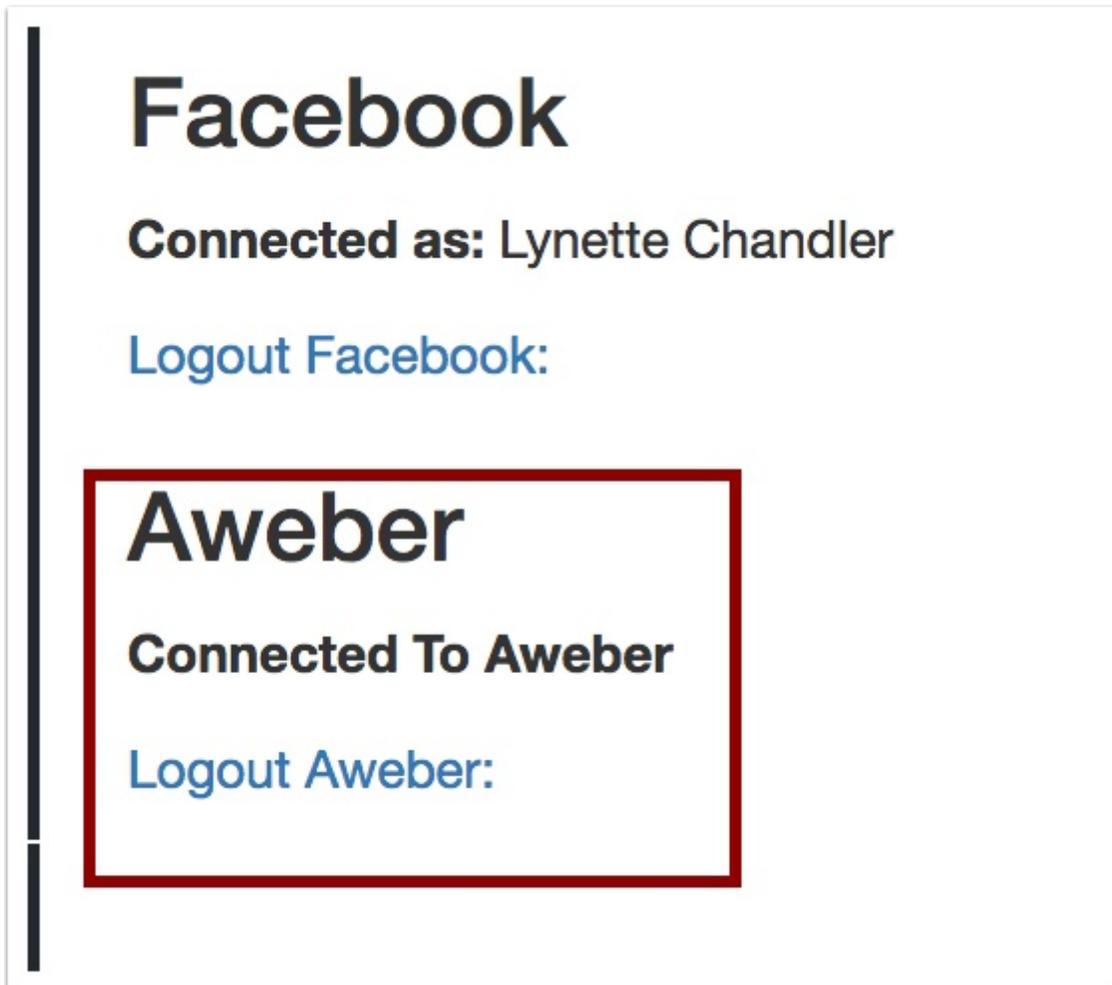
[Allow Access](#) [Deny](#)

[Permissions Policy](#)

# Lead Book User Guide

## Logged Into Aweber

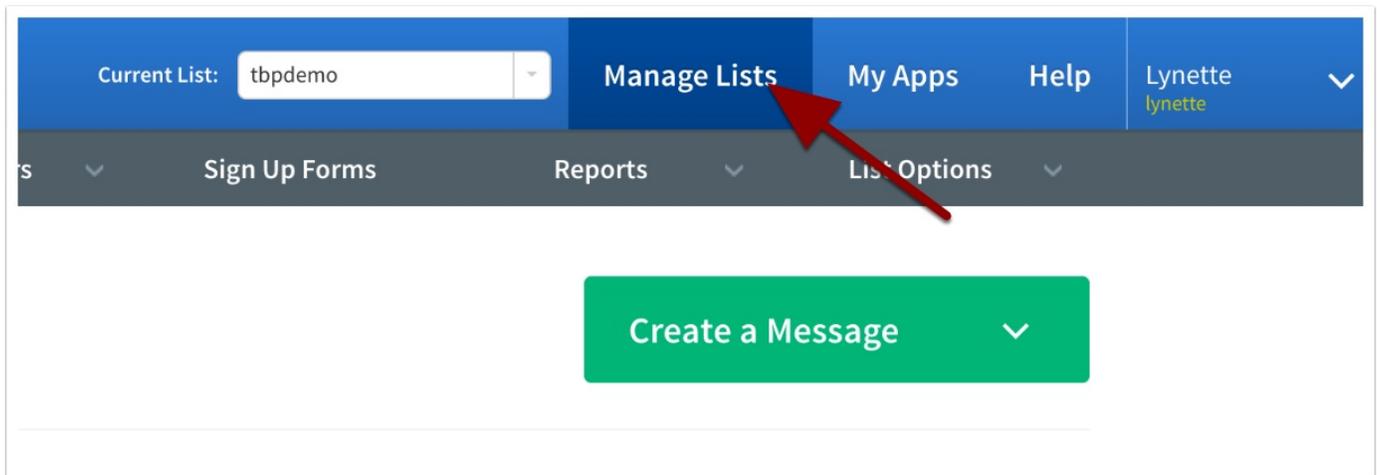
Once you have done that, when you return to your plugin, you will see this to confirm you are connected to Aweber.



# 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.

The screenshot shows a table of email lists. The table has columns for list name, status, subscribers, and unsubscribers. Each row has a 'Deactivate' button. A red arrow points to the 'Deactivate' button for the list 'Customer list for TechBasedTraining.com'. Below the table, a browser address bar shows the URL: <https://www.aweber.com/users/lists/deactivate/1101936/2>. The last part of the URL, '1101936/2', is highlighted in yellow, and a red arrow points to it.

Technology Content	Active	55 Subscribers	1 Unsubscribes	Deactivate
customers	Active	120 Subscribers	3 Unsubscribes	Deactivate
ges	Active	0 Subscribers	0 Unsubscribes	Deactivate
	Active	92 Subscribers	6 Unsubscribes	Deactivate
Customer list for TechBasedTraining.com	Active	136 Subscribers	1 Unsubscribes	Deactivate

<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

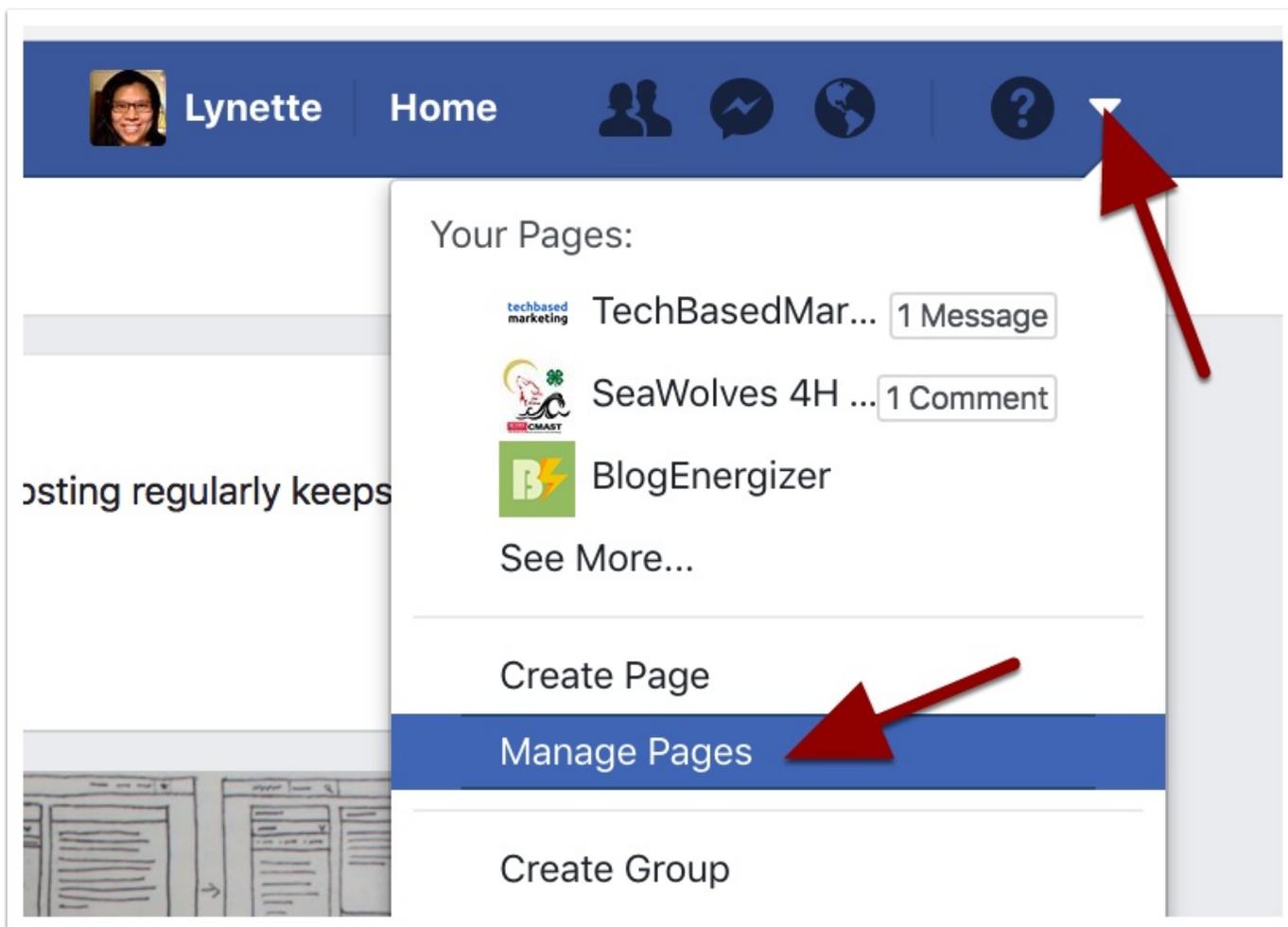
**Aweber:**

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.

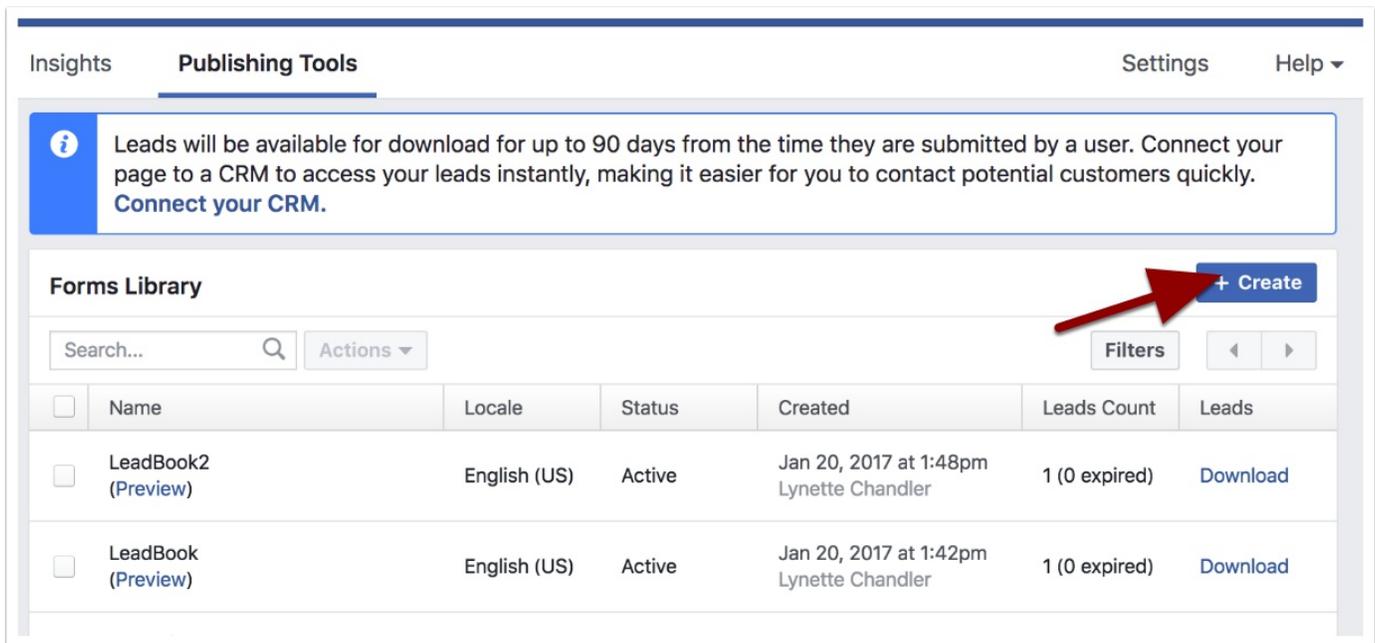
The screenshot displays the Lead Book interface. On the left is a sidebar menu with the following items: Videos, Video Library, Videos You Can Crosspost, Lead Ads Forms, Forms Library (highlighted with a red arrow), Draft Forms Library, Leads Setup, and Canvas. On the right is a list of lead ads, each with a checkbox, a thumbnail image, and a title:

Checkbox	Thumbnail	Title
<input type="checkbox"/>		Work Harc
<input type="checkbox"/>		Internation
<input type="checkbox"/>		National C
<input type="checkbox"/>		National C
<input type="checkbox"/>		Golden GI TV Drama

# Lead Book User Guide

## Create A Form

Click the +Create button



The screenshot displays the 'Publishing Tools' section of the Lead Book interface. At the top, there are navigation tabs for 'Insights', 'Publishing Tools', 'Settings', and 'Help'. A blue information banner at the top left contains the text: '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.**'

Below the banner is the 'Forms Library' section. It features a search bar with the placeholder 'Search...', an 'Actions' dropdown menu, and a 'Filters' button. A red arrow points to a blue '+ Create' button located in the top right corner of the library area.

<input type="checkbox"/>	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)	<a href="#">Download</a>
<input type="checkbox"/>	LeadBook (Preview)	English (US)	Active	Jan 20, 2017 at 1:42pm Lynette Chandler	1 (0 expired)	<a href="#">Download</a>

# 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.

Lead Form

### Create a Lead Form

- New Form**  
Create a new form and enter all new information.
- Duplicate an Existing Form**  
Duplicate one of your existing form and change only what you want.

Next

# Lead Book User Guide

## Setup Your Welcome Screen

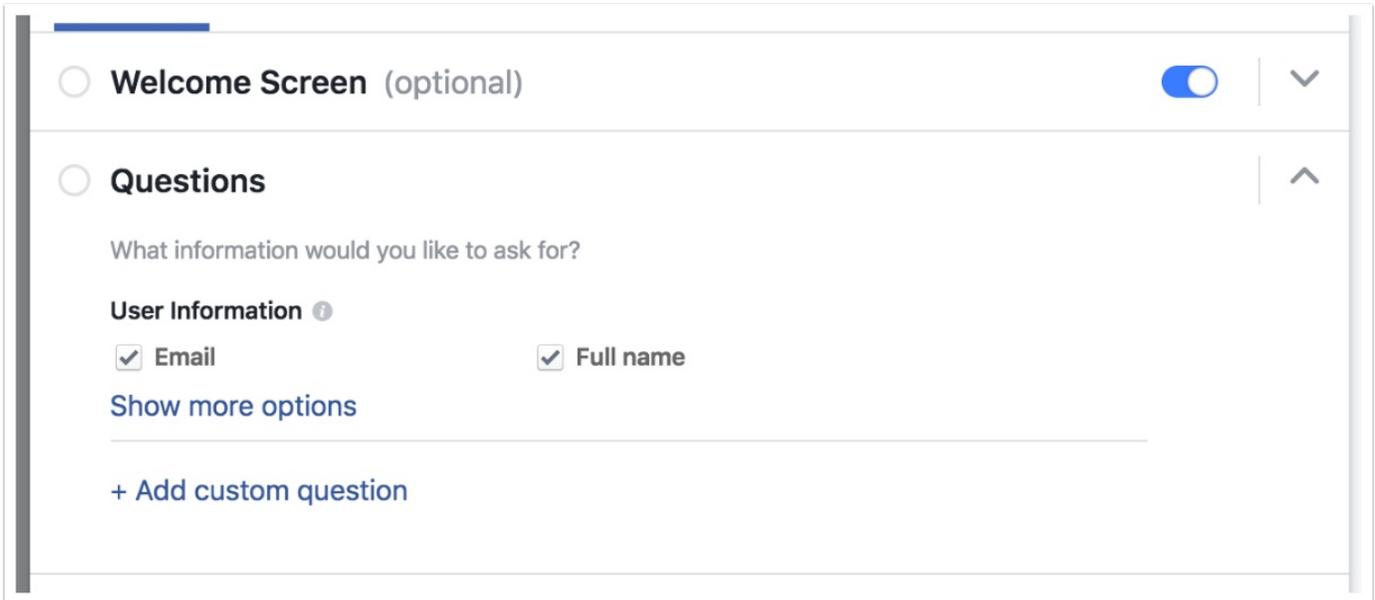
If you want your form to display a welcome screen before they enter their information, you'll want to turn the welcome screen on and complete the form by giving it headline, image, a short description and button text. The welcome screen is optional.

The screenshot displays the 'Lead Form' configuration interface. At the top, there are 'Save' and 'Finish' buttons. Below the title bar, there are tabs for 'Content' and 'Settings'. The 'Content' tab is active, showing the 'Welcome Screen (optional)' section with a toggle switch turned on. The 'Welcome Screen' section includes a 'Headline' field with a character count of 60, an 'Image' selection (with 'Use uploaded image' selected and a recommended size of 1200 x 628 pixels), a 'Layout' dropdown set to 'Paragraph', and a 'Button' field with a character count of 30. Below this are sections for 'Questions' and 'Privacy Policy'. To the right, a 'Form Preview' shows a visual representation of the welcome screen with a placeholder for an image, a 'Forms Library' label, 'Headline Text', and a blue 'Button Text' button. At the bottom of the preview, it indicates 'Welcome Screen' and '1 of 3' with navigation arrows.

# Lead Book User Guide

## Questions

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

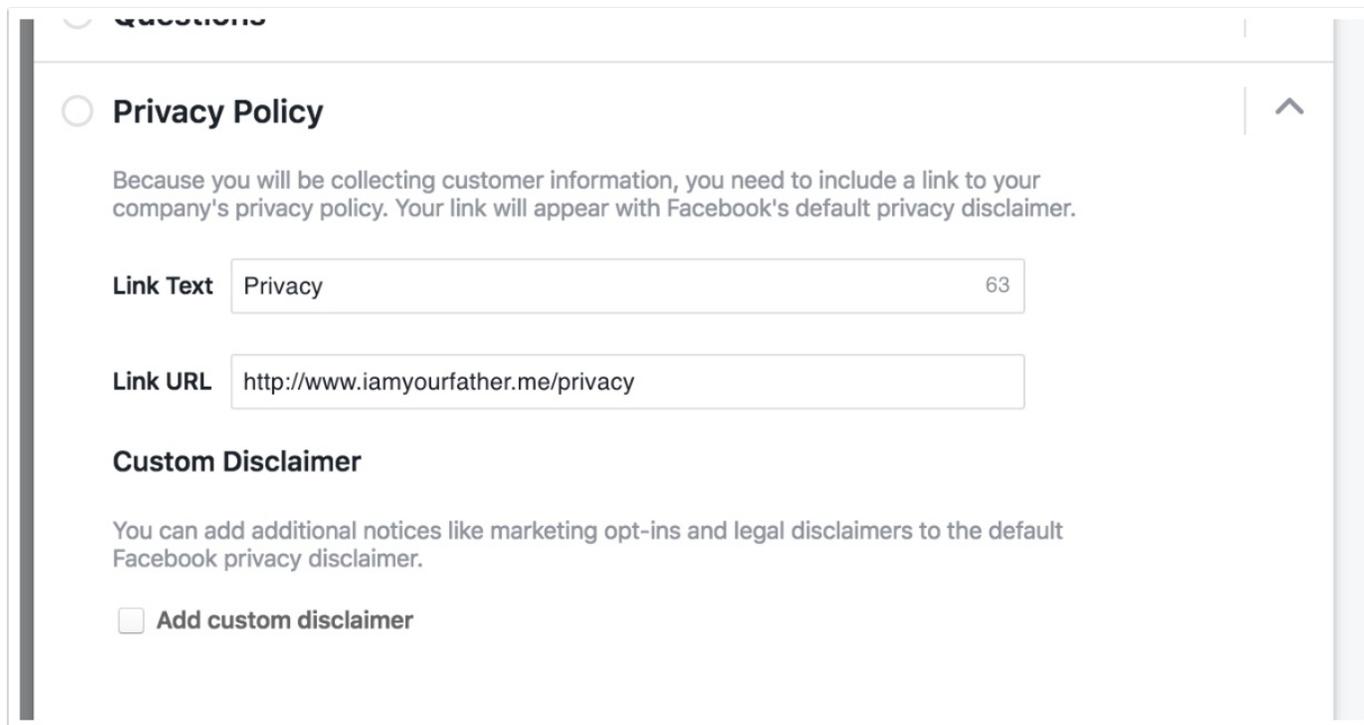


The screenshot shows a settings panel with two main sections. The first section is 'Welcome Screen (optional)', which has a radio button selected and a toggle switch turned on. The second section is 'Questions', which has a radio button selected. Below this, there is a heading 'What information would you like to ask for?' followed by a sub-heading 'User Information'. Under 'User Information', there are two checked checkboxes: 'Email' and 'Full name'. Below these checkboxes is a link 'Show more options' and a link '+ 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.



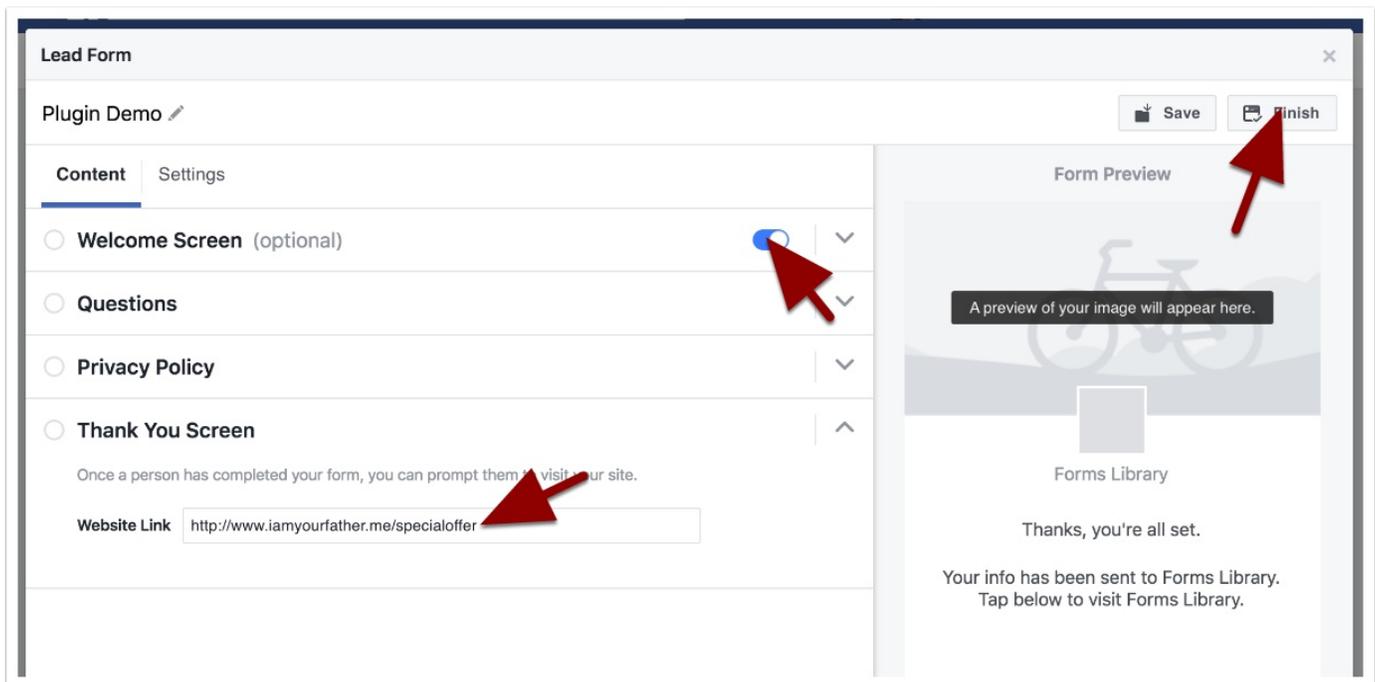
The screenshot shows a configuration window for a privacy policy. At the top, there is a section header "Privacy Policy" with a radio button and an upward arrow. Below this, a paragraph explains that a link to the company's privacy policy is required, which will appear with Facebook's default disclaimer. There are two input fields: "Link Text" with the value "Privacy" and a character count of "63", and "Link URL" with the value "http://www.iamyourfather.me/privacy". Below these fields is a section titled "Custom Disclaimer" with a paragraph explaining that additional notices like marketing opt-ins and legal disclaimers can be added. At the bottom of this section is a checkbox labeled "Add custom disclaimer" which is currently unchecked.

# Lead Book User Guide

## Thank You Screen

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

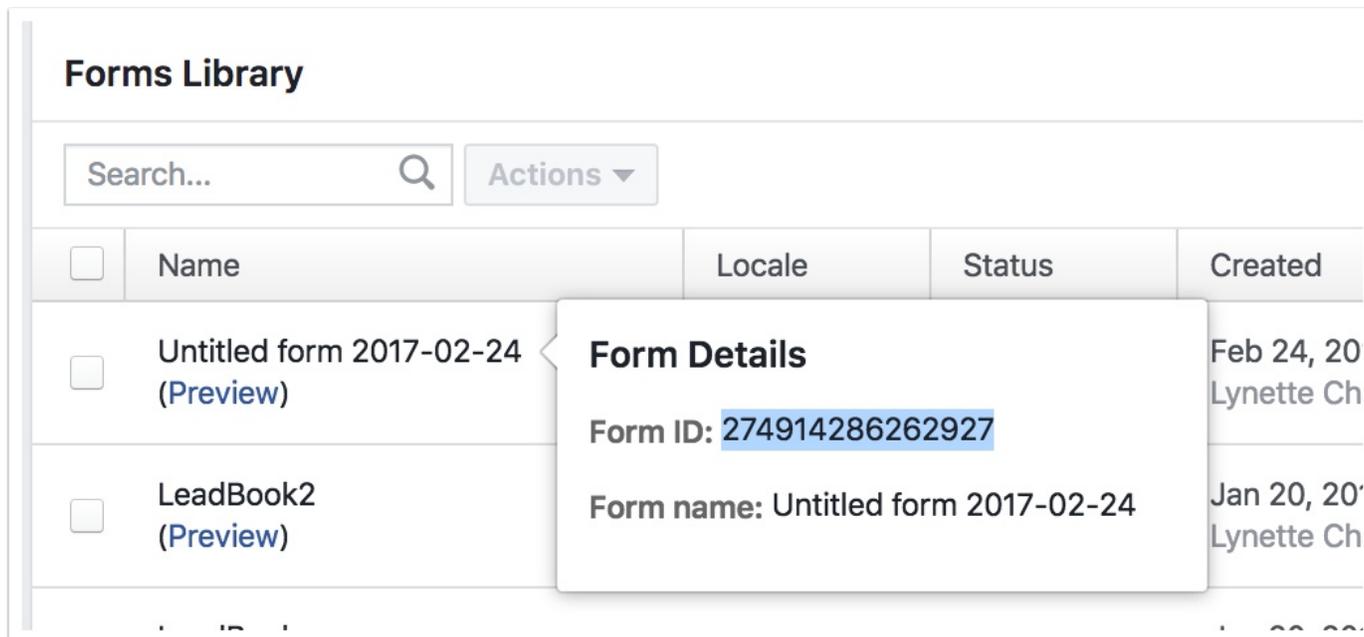
Then click Finish. If you are not using a Welcome Screen, be sure to toggle the Welcome Screen off before you click Finish.



# 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.



The screenshot shows the 'Forms Library' interface. At the top, there is a search bar with the text 'Search...' and a magnifying glass icon, and an 'Actions' dropdown menu. Below this is a table with the following columns: Name, Locale, Status, and Created. The table contains two rows of data:

<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

A 'Form Details' popup is displayed over the first row of the table. The popup contains the following information:

- 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

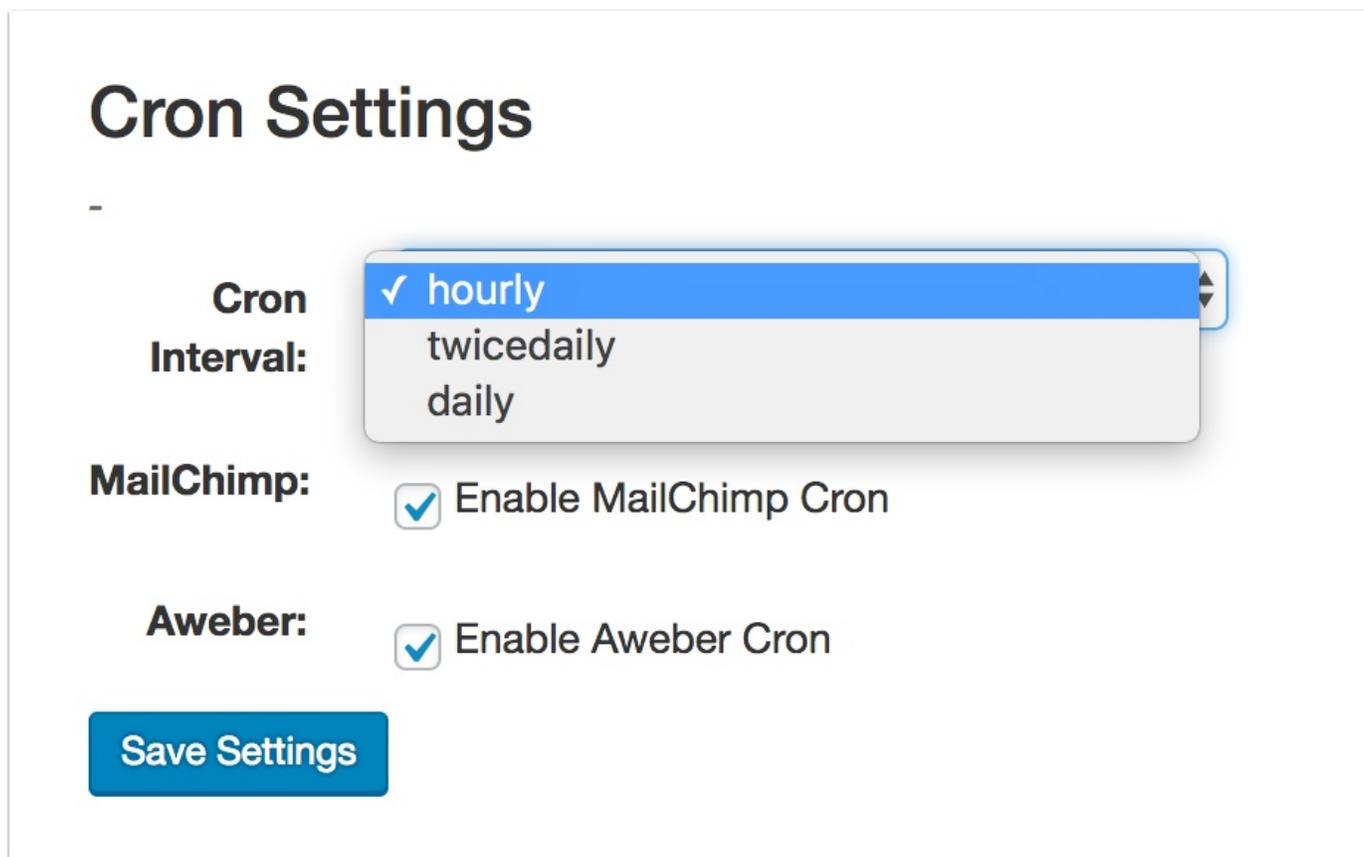
## Configure Cron Settings

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 displays the 'MailChimp Integration' settings page. The left sidebar contains a menu with 'Lead Book' selected. The main content area shows the following fields and values:

MailChimp Form	
Form ID	
Last Cron Run	
Next Cron Run	
Download Link	
Date	
Total Leads	1
New Leads Imported	-

Below the fields, there are two buttons: 'Check Leads' (blue) and 'Import Leads' (green). A red arrow labeled '1' points to the 'Check Leads' button in the sidebar. Another red arrow labeled '2' points to the 'Import Leads' button in the main content area.