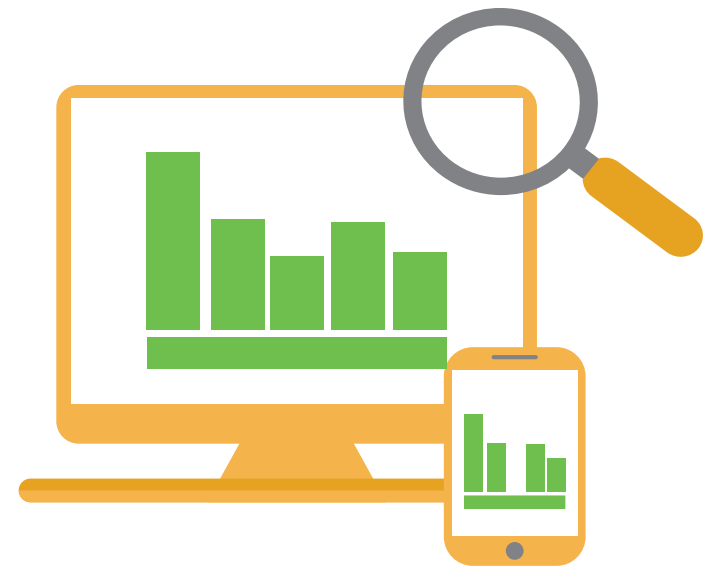




HOW TO VIEW YOUR FORM LEADS (NEW EDITOR)

The Form Leads module of our portal is a great way to keep track of forms patients have submitted on your website. Form Leads can be sent directly to your e-mail, but are also organized and viewable in your account. Follow these instructions below to stay on top of your form leads!

1. Sign into your account at portal.onlinechiro.com
2. Once logged in, click on the "Form Leads" tab in the menu bar on the left side of the screen under the category "Lead Tracking"
3. Once here, you'll be able to see the forms submitted by patients on your website. You will see the general contact information at first, to open up the lead and view the message, click on the "Action" tab on the right side of the screen and then click on "View".
4. Now, you should be able to view the contents of the lead, you can even use this area of your account to make notes regarding these leads if you so choose.



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5. By default, our system will notify you by e-mail when a form has been filled out, letting you know to check the Form Leads area of your account. If you would like to receive the content of form submissions in your e-mail, you will need to accept the Disclaimer on the Form Leads Settings page. You can access this by clicking on the gear icon in the right side of the screen under Form Leads.

6. Here you can accept the disclaimer to "Receive Form Content" You can also view the disclaimer text here.

Please note: If you have more than one type of form on your website, you will need to accept the disclaimer for all types of forms on your site individually. You can change what form settings you are editing by clicking on the drop down box in the top right of the screen in the Form Leads Settings area.

7. Congratulations! You are now ready to view and manage your form leads!

