

Funding Tool Setup Instructions

Login to the Funding Tool Portal

Visit https://prequal.benetrends.com/ to access the funding tool portal.

To login, use the following information:

Username: the email you shared with us which will accept all leads for your brand Password: BT1234 ***you can change this password later if you wish

PRE-QUALIFICATION DASHBOARD
*
Login E-Mail Address
Pasword
Forgot Your Password? Login

Edit Funding Tool

Once logged in, under Action, click the **Edit** button to change the settings of the funding tool.

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Below is the edit form page where you can make various adjustments.

Dashboard	Edit Form
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Email

Emails will already be populated. The emails field determines who will receive notification of when someone submits info on the form. Please keep Benetrends email(s) in the email field to ensure prospects aren't forgotten about/the proper sales rep is made aware of the submission. You can add additional email addresses or change out emails when personnel changes occur.

Form Name

This field will also be pre-populated with the name of your brand.

Form Type

There are two variations of the funding tool: single- and double-sided. Here are how the two variations look. **All calculators sent are automatically set to double-sided, unless specified otherwise.**

Here is a view of Double-Sided

				Your Result	Are In!	
				You May Pre-C	ualify For	
Total Cash Amount In All Your Accounts	First Name			\$1,375,0	00.00	
Interiorg savings, more your state (CD), enc.)	Last Name		Based on the Information you ensured, or well as a further breakdown of funding resi Addisional fectors may impact the am Banacronos	or pre-qualification estimator has de coptions in the chart below. This tots rement funds, stocks and bonds, plu- ount of funding eventable, and not all representative to closurs your indiv	ermined the possible amount of N I smount is entimented based on all I amount is entimented SBA Noen emount. Funding options can be used in co dual situation and confirm actuals	nding you may qualify for above, as unalization options, including cases, ntinotion, Preze consult with a solits.
Total Value Of Non-Retirement Investments	Email Address					
Credit Score If you are not served your current aread score, vist mytheadred trapert.com or Creditionme.com)	Phone Number			\$150.000	\$1,225,000	Are use a fault The area control to the Hiteristics representation, and the task could for the family program Research and the distribution is never means where additional functing
			TIME TO FUND	EXENSIVE AD1/SUPERIN 10 - 20 burnets days	SBALCARY	20.88
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			INTERSST RATES	1000	Prime + 2,75%	
Powered by			MONTHLY PAYMENTS	\$0	Principal # Interesc	
penetrenos			This baof is intended to be used for estimation on estimate based on the information practi- include: Aquid assets analysis in operations	al purposes. Results should not be deen of to all, and therefore must be validon outside or succedary source of income collateral result	ud definibles or regarded as a promi d by Benevensi for accuracy. Some .appirable or tracsfirmble manager enters.	e or fines determinention of funding. It a factors which could impact this transuit wet shifts and the oblights solitigh 558

Here is a view of Single-Sided

Total Cash Amount In All Your Accounts	Your Results Are In!
hecking, savings, money markat, CDs, etc.)	You May Pre-Qualify For
	\$4,555,000.00
Total Value Of Retirement Funds	
(ro, nos, ane varen earennan associata)	Based on the information you entered, our pre-qualification estimator has
	es a futher breakdown of functions in the chart below. This total
	as a number of early of the original of the or
tal Value Of Non-Retirement Investments	retirement funds, stocks and books, olus an estimated SBA loan amount
ka, bonda, etc.)	readente in servar, avoide and bornar, prear an easimates over nem announce
	Additional factors may impact the amount of functing available, and not all
	funding options can be used in combination. Please consult with a
redit Score	Benetrends representative to discuss your individual situation and confirm
you are not sure of your current credit score, visit myfreecreditreport.com or CreditKarma.com)	actual results.
rst Name	
	\$600,000 \$3,850,000 \$105,000
	BAINMAKER SDA LOAN SDI OC
ast Name	401/K) PLAN
	TIME TO 10 - 20 30 - 60 business 10 business
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mail Address	TERM none 7 - 10 years Revolving
	NUTLINE AT
	Parts none Prime + 2.75% Variable
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	MONTHLY S0 Principal + Interest Only
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	This tool is intended to be used for educational purposes. Results
Calculate Now	should not be deemed definitive or regarded as a promise or final
	determination of funding. It is an estimate based on the information
	provided to us, and therefore must be validated by Benetrends for
Powered by Benetrends	accuracy. Some factors which could impact this amount include: liqui
FINANCIAL reduced before a before	assets available after closing, outside or secondary source of income
constitute answers and for farmer	applicable or transferable management skills and the ability to satisfy
	SBA collateral requirements.

CSS Code

CSS Code allows the funding tool to be customized in various ways (i.e. colors, fonts, size, etc.). The standard form is neutral and works for most pages. For changes to occur to the funding tool, the CSS Code must be altered in the edit form page.

Adding the Funding Tool

To add the funding tool, the HTML code is needed. The HTML code is accessible through the **</> Code** button in the forms section.

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©\$ Settings <	Sample Form	Benetrends Financial	3	0	0	0%	🕼 Edit 💼 Delet 🛷 Code			
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Once the **button** is clicked, the code will pop up on the screen.

Source Code for the Form ×
<div class="bents-form-outter"><div class="bents-message"></div></div> <link <br="" itemprop="url" rel="stylesheet"/> href="https://prequal.benetrends.com/form_creator_css/c8ac6ab2201ee38b48d00e9cc65 caa16.css"> <script src="https://prequal.benetrends.com/form_creator/c8ac6ab2201ee38b48d00e9cc65caa16 .jsonp"></script
Copy & Close

Once the HTML code is copied, paste it into the backend of your website where pages can be designed/modified. If you are working with a web developer, we will provide this to him/her for implementation.

How the Funding Tool Works

When someone submits their information, it is stored/viewable in the backend portal. When you log in, you'll arrive at the dashboard where you will see this:

de Dashboard	Dashboard										
🐣 Leads	Recap Report										
🕼 Forms	Aug, 2018 - Jan, 2019	Aug. 2018 - Jan, 2019									
og Settings <		100% 1 NUMBER OF CONVERSIONS THIS MONTH									
		▲ 100% 1 NUMBER OF QUALIFIED PROSPECTS THIS MONTH									
	August September October November December Janua	ny									
	Recent Leads										
	Date of Submission Name	Email Address									
<	Jan 15, 2019 16:48:04 Test Testing	test@yahoo.com									

To get more detail on leads submitted, click on the leads tab and you will see:

ashboard	Leads										
A Leads	Show 10 • entries	Show 10 • entries Search:									
C Forms	Form Name	Name 11	Email 11	Phone 11	Total Assets	Qualified / Non-Qualified	Date of Submission	11 Action			
🕫 Settings	Sample Form	Test Testing	test@yahoo.com	6105555555	3,170,000	Qualified	Tue, Jan 15, 2019	🗇 Delete			
	Showing 1 to 1 of 1 entries	Previous 1 Next									

When a prospect submits their information, you will instantly receive notification. Be sure to whitelist noreply=benetrends.com@benetrends.mg.myprosupport.net so that you won't miss out on any notifications. Your Senior Consultant will also receive notification. You should discuss the process on reaching out to your clients with him/her.

	Tue 1/15/2019 11:48 AM		
В	noreply=benetre	ends.com@benetrends.mg	g.myprosupport.net on behalf of Benetrends
	New Funding Tool Fo	rm Submission	
To marketing te	am		
		FINANCIAL Funding your business. Fueling your growth.	
		We have exciting news! A new contact through our funding tool! Here is their	has submitted their information to Benetrends information:
		Form Name:	Sample Form
		First Name:	Test
		Last Name:	Testing
		Email:	test@yahoo.com
		Phone Number:	6105555555
		Total Cash in Accounts:	\$500,000
		Total Value of Retirement Funds:	\$300,000
		Total Value of Non Retirement Funds:	\$100,000
		Total Qualify:	\$3,170,000
		Lead Status:	Qualified
		Benetrends Team	

Update Profile Settings

Need to make changes?

In the portal, the last option in the tab menu is Settings. Click **Settings** and **Change Password** and **Profile** will appear. Here you can revise your password or change the email to log into the portal.

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	August	September	October	November	December	Januar			
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		Current Password							
		New Password							
		Enter New Password							
		Enter Confirm Password							
		Submit Cancel							
	L								
			Profile						
	First Name :	Test							
	Last Name :	Test							
	Phone Number	+1 555-555-5555	om						
	Company Nam	e: Benetrends Financial							
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		MarketingTe	am@benetre	nds.com					
		maritetingre							