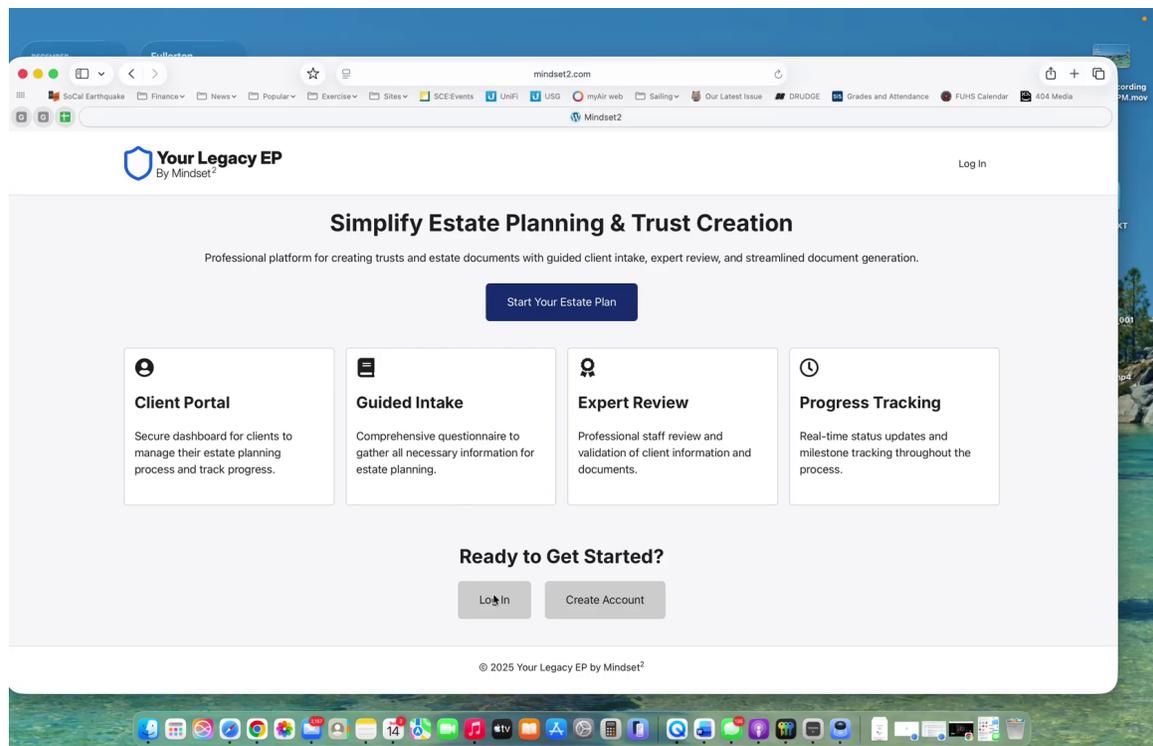


Dashboard and New Intake Assistance Internal Training Manual

This training manual accompanies the Dashboard and New Intake Assistance video and is designed to guide staff through the workflow of using the Estate Planning (EP) software dashboard, sending new client intakes, and supporting clients through built-in assistance tools.

Overview of the Dashboard

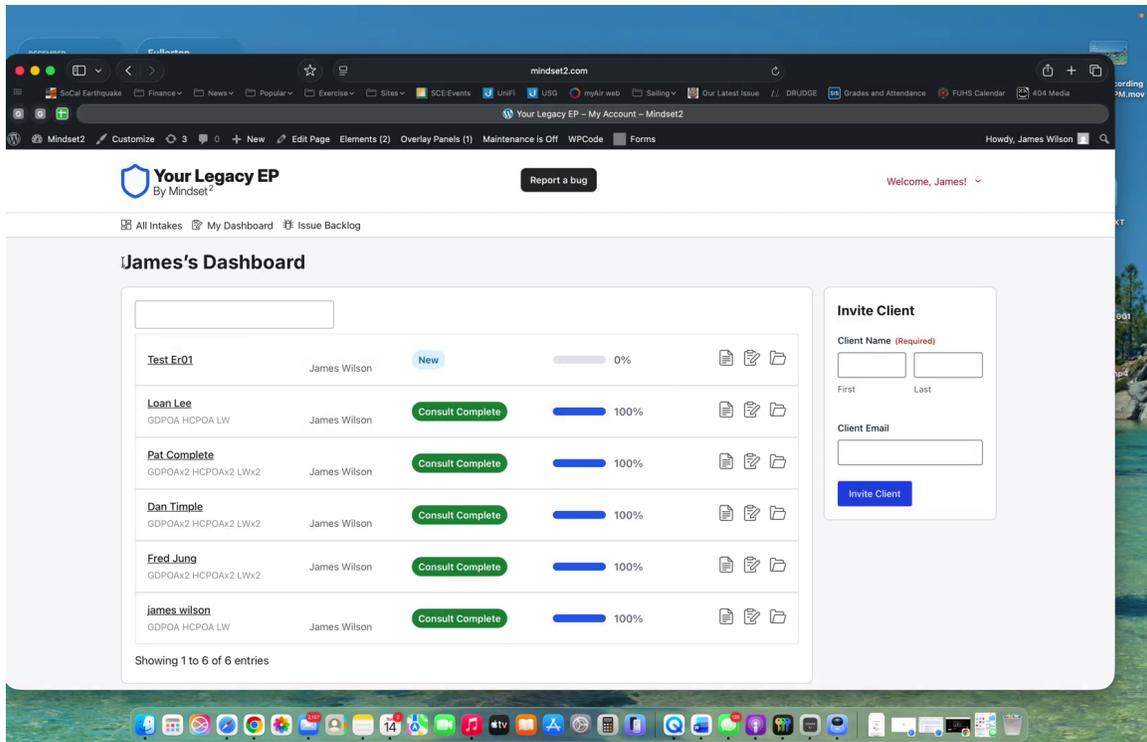
When you log into the EP software, you are taken directly to your dashboard. This dashboard is your control center for intake activity and should be reviewed daily.



Coaching Note: Think of the dashboard as your intake inbox. If a client stalls, it will show here first.

My Dashboard vs. All Intakes

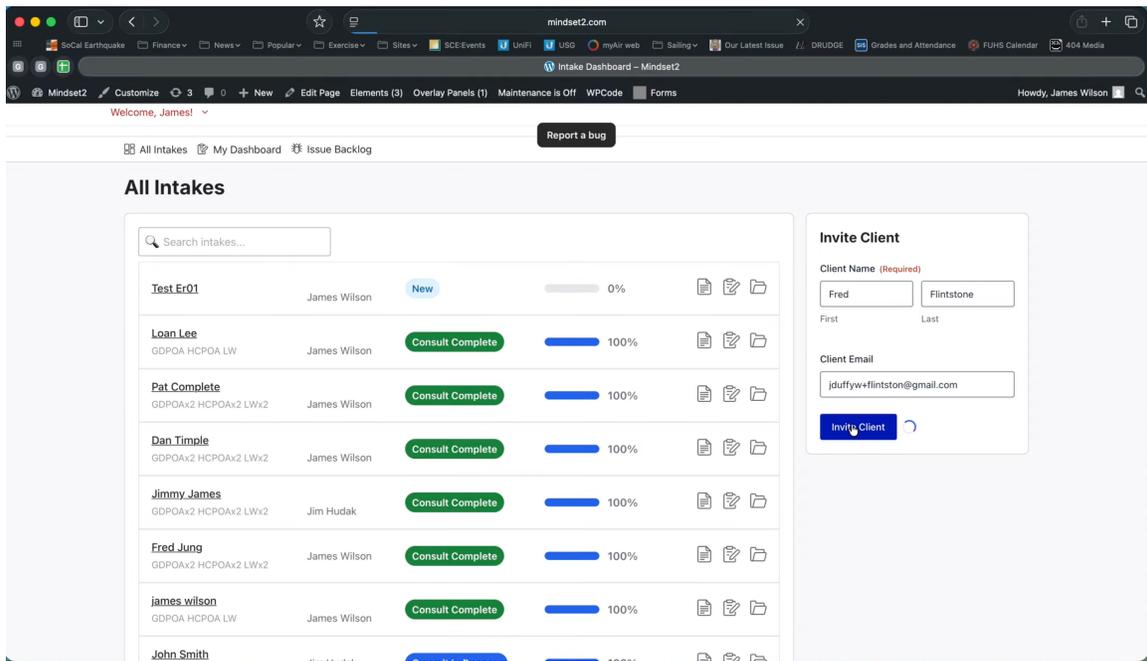
My Dashboard shows only the consults and questionnaires assigned to you. All Intakes shows every client in the system across the firm.



Ownership matters. If a client is assigned to you, follow-up is your responsibility.

Sending a New Client Intake

When a prospective client is ready, you can send a new intake directly from the dashboard using the New Intake form on the right side of the screen.



Entering the client's name and email automatically creates their record and sends the intake email.

The screenshot shows the 'Your Legacy EP' Intake Dashboard. The main content area is titled 'All Intakes' and contains a table of client records. To the right is a form titled 'Invite Client' for adding new clients.

Client Name	Client Email	Status	Progress	Actions
Fred Flintstone	James Wilson	New	0%	[Icons]
Test Er01	James Wilson	New	0%	[Icons]
Loan Lee GDPOA HCPOA LW	James Wilson	Consult Complete	100%	[Icons]
Pat Complete GDPOA2 HCPOA2 LWx2	James Wilson	Consult Complete	100%	[Icons]
Dan Timple GDPOA2 HCPOA2 LWx2	James Wilson	Consult Complete	100%	[Icons]
Jimmy James GDPOA2 HCPOA2 LWx2	Jim Hudak	Consult Complete	100%	[Icons]
Fred Jung GDPOA2 HCPOA2 LWx2	James Wilson	Consult Complete	100%	[Icons]

Invite Client Form:

Client Name (Required): [First Name] [Last Name]

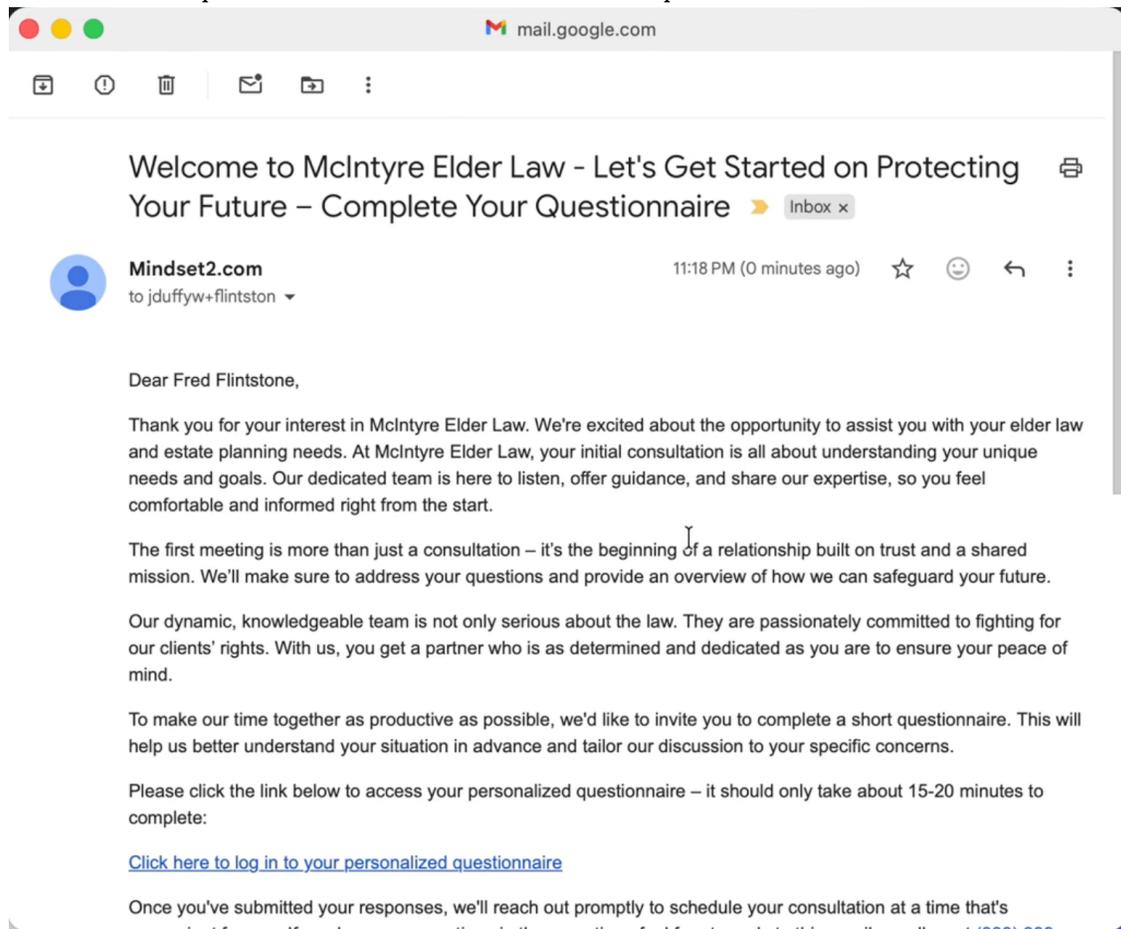
Client Email: [Email Address]

[Invite Client]

Once sent, the client immediately appears on your dashboard and the All Intakes view.

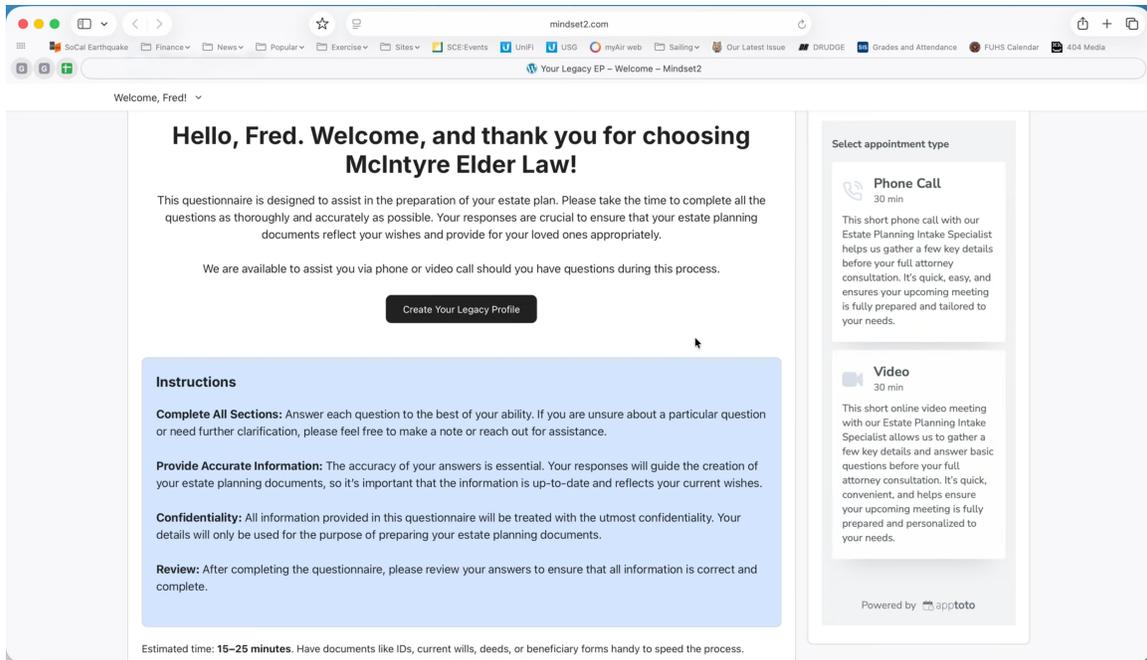
Client Intake Email & Magic Link

Clients receive a welcoming email with clear instructions and a magic link that allows them to access their questionnaire without a username or password



The screenshot shows a Gmail interface with the following elements:

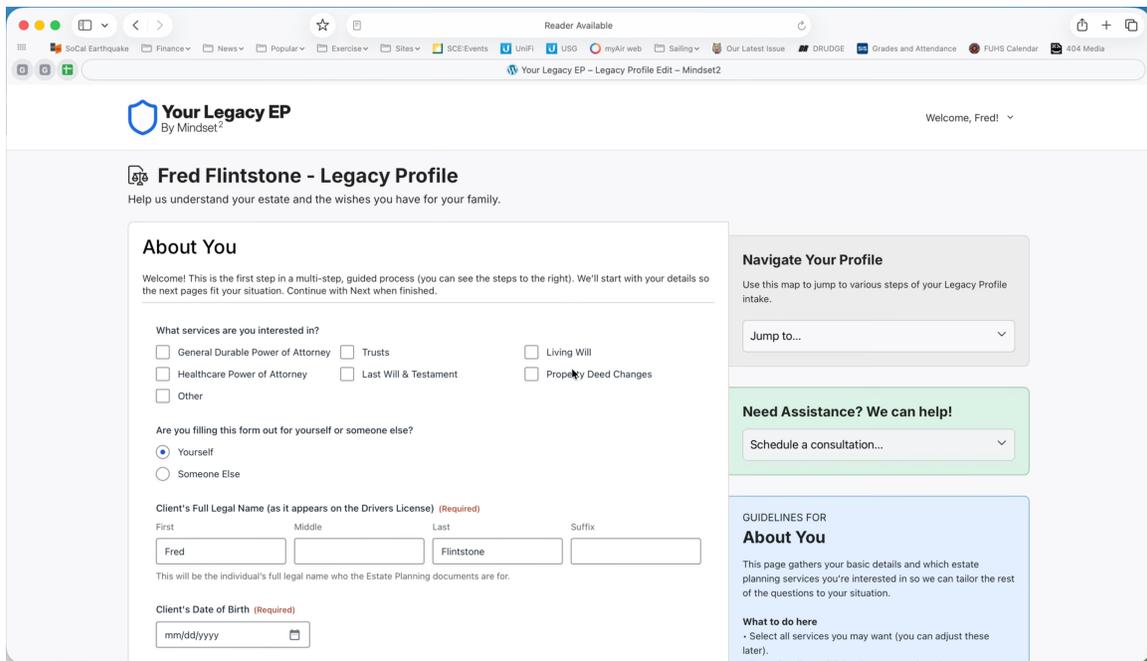
- Browser/Email Client Header:** "mail.google.com" and navigation icons (back, forward, search, etc.).
- Subject Line:** "Welcome to McIntyre Elder Law - Let's Get Started on Protecting Your Future – Complete Your Questionnaire" with an "Inbox x" label.
- Sender:** "Mindset2.com" with a profile picture and recipient "to jduffy+flintston".
- Time:** "11:18 PM (0 minutes ago)" with star, smile, and reply icons.
- Body Text:**
 - Greeting: "Dear Fred Flintstone,"
 - Paragraph 1: "Thank you for your interest in McIntyre Elder Law. We're excited about the opportunity to assist you with your elder law and estate planning needs. At McIntyre Elder Law, your initial consultation is all about understanding your unique needs and goals. Our dedicated team is here to listen, offer guidance, and share our expertise, so you feel comfortable and informed right from the start."
 - Paragraph 2: "The first meeting is more than just a consultation – it's the beginning of a relationship built on trust and a shared mission. We'll make sure to address your questions and provide an overview of how we can safeguard your future."
 - Paragraph 3: "Our dynamic, knowledgeable team is not only serious about the law. They are passionately committed to fighting for our clients' rights. With us, you get a partner who is as determined and dedicated as you are to ensure your peace of mind."
 - Paragraph 4: "To make our time together as productive as possible, we'd like to invite you to complete a short questionnaire. This will help us better understand your situation in advance and tailor our discussion to your specific concerns."
 - Paragraph 5: "Please click the link below to access your personalized questionnaire – it should only take about 15-20 minutes to complete:"
 - Link: "[Click here to log in to your personalized questionnaire](#)"
 - Paragraph 6: "Once you've submitted your responses, we'll reach out promptly to schedule your consultation at a time that's convenient for you. If you have any questions in the meantime, feel free to reply to this email or call us at (888) 600-XXXX."



This reduces friction and makes it easier for clients to begin immediately.

Questionnaire Assistance & Scheduling

Throughout the questionnaire, clients are reminded that help is available. They can request assistance at any time if they feel stuck or overwhelmed.



Encouraging messages help clients continue rather than abandon the process.

mindset2.com

Your Legacy EP - Legacy Profile Edit - Mindset2

First: Fred Middle: Last: Flintstone Suffix:

This will be the individual's full legal name who the Estate Planning documents are for.

Client's Date of Birth (Required): mm/dd/yyyy

Client's Mailing Address (Required):
Street Address:
Address Line 2:
City: State: North Carolina
ZIP Code:

Client's County of Residence: Alamance Client Contact Phone (Required):
Client Contact Email Address (Required):
Email Address: Confirm Email Address:

Does client have a valid, non-expired, government issued form of identification?
Notarization of documents requires a valid, non-expired, ID.

Need Assistance? We can help!

Schedule a consultation...

Select appointment type

Phone Call
30 min
This short phone call with our Estate Planning Intake Specialist helps us gather a few key details before your full attorney consultation. It's quick, easy, and ensures your upcoming meeting is fully prepared and tailored to your needs.

Video
30 min
This short online video meeting with our Estate Planning Intake Specialist allows us to gather a few key details and answer basic questions before your full attorney consultation. It's quick, convenient, and helps ensure your upcoming meeting is fully prepared and personalized to your needs.

Powered by apptoto

Clients can schedule a phone or video call with an Estate Planning Intake Specialist. Early assistance often prevents total drop-off later.