



meet maple

Where personal growth takes root

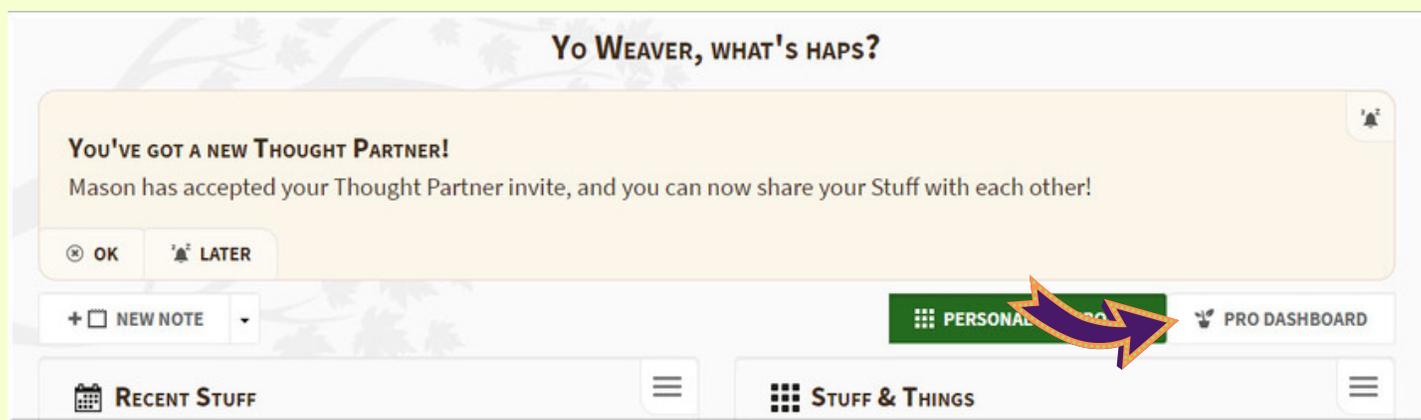
Connecting to Clients in Maple Pro

Let's Get Started

You connect with clients by creating an invitation code from your Maple Pro Dashboard, which you then send to your client via e-mail, text, or give it to them in person. They can enter that code into Maple later, and viola – you're connected!

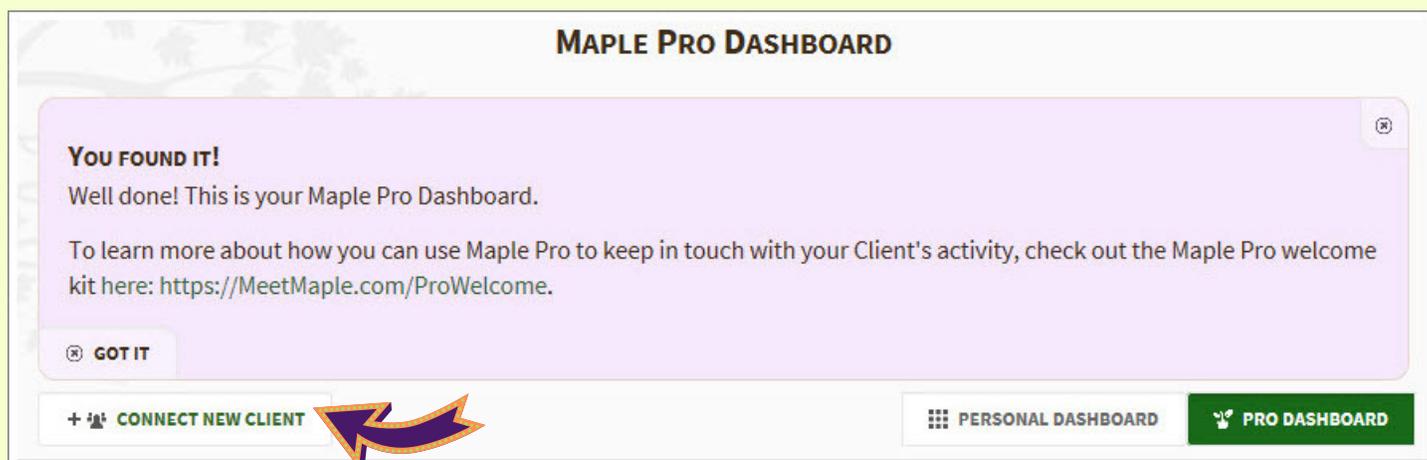
Step 1: Log in to Maple and go to your Maple Pro Dashboard

Use the Pro Dashboard button under the message box or go to the My Maple menu and select *Pro Dashboard*.



Step 2: Click the Connect New Client button.

It's just below the purple message box on the left side.



Step 3: Type in your client's name and click Create Invitation.

You can also adjust your name, this is how your client will recognize the invite is from you. *Note: The client does not see the Client Name you type in for them, this is only visible to you.*

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CONNECT WITH A CLIENT

Enter the name of the person you want to connect to, and click "Create Invitation". We'll generate a code that you can give to your Client so they can complete your connection in Maple.

MY NAME

Weaver

CLIENT NAME

Jaime

CANCEL CREATE INVITATION

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Step 4: Copy the URL or Code and send to your client. Click Continue.

You send the URL via email or share the Code via text or even verbally. Check the Maple Pro Welcome Kit for sample emails you can use to send with the link to your client.

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CONNECTION INVITE CREATED

Nice! Here's your invitation code.

https://maple.com/invite/... COPY URL

What's next? Glad you asked! Simply send this URL to Jaime and when they click it they will be able to accept your invitation, and you will be officially connected in Maple!

If a URL isn't convenient, you can read or text this code to them and they can enter it at MapleThat.com/Connect or from the logon page in the Maple app. Anyone with an existing Maple account can also enter connection codes from the My Maple / Redeem a Code menu or the My Maple / Thought Partners page.

... COPY CODE

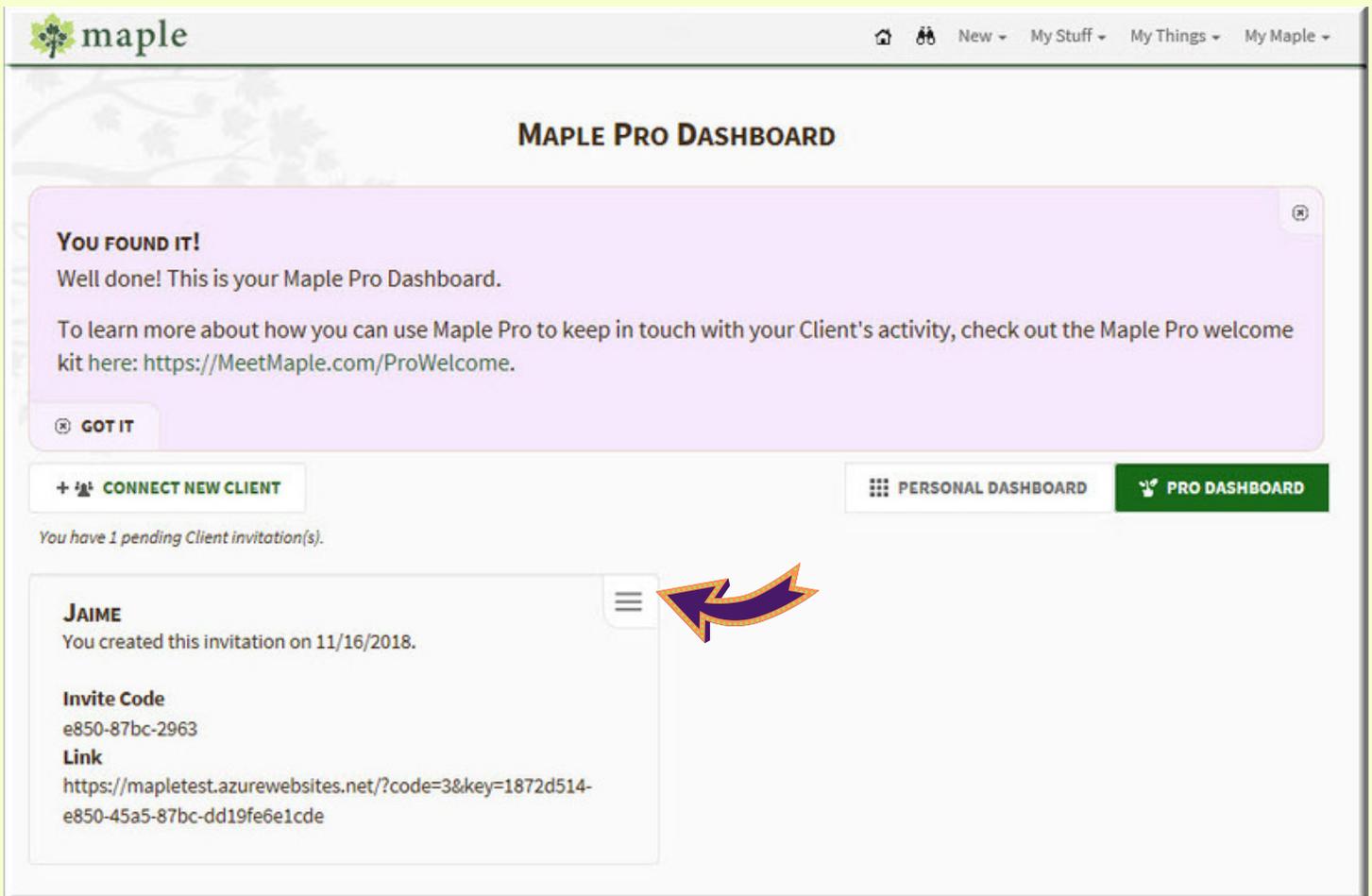
NOTE: This code can only be used once, so make sure you send it to just one person.

CONTINUE

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Step 5: Check your Maple Pro Dashboard to see the Pending Client Invite.

This invite displays until your client Confirms or Declines the invitation or you Delete it using the mini menu. See the *Maple Pro Welcome Kit Get to Know the Client Tile* for details about the tile after your client confirms the connection.



The screenshot shows the Maple Pro Dashboard interface. At the top, there is a navigation bar with the Maple logo and user options: Home, Profile, New, My Stuff, My Things, and My Maple. The main heading is "MAPLE PRO DASHBOARD". A large purple notification box contains the text: "YOU FOUND IT! Well done! This is your Maple Pro Dashboard. To learn more about how you can use Maple Pro to keep in touch with your Client's activity, check out the Maple Pro welcome kit here: <https://MeetMaple.com/ProWelcome>." Below this is a "GOT IT" button. There are two main navigation buttons: "CONNECT NEW CLIENT" and "PERSONAL DASHBOARD" (highlighted in green), and "PRO DASHBOARD" (highlighted in green). A status message says "You have 1 pending Client invitation(s)". Below this is a card for a client named "JAIME", stating "You created this invitation on 11/16/2018." The card lists the "Invite Code" as "e850-87bc-2963" and the "Link" as "https://mapletest.azurewebsites.net/?code=3&key=1872d514-e850-45a5-87bc-dd19fe6e1cde". A purple arrow points to a mini menu icon on the right side of the JAIME card.

That's it! You're done. Yup, it's just that fast. Let's start Mapling!



Still Have Questions?

No problem! We're here for you. Go to the My Maple menu and select *Help!* Send us a system message or an email with your questions and we'll get you Mapling in no time.