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PROSPECT PRO OVERVIEW

Q. What is Prospecting?

A. Prospect-Pro is a powerful direct mail based drip marketing system that is designed to find qualified people that you can sell your products to. Prospecting is the act of searching for qualified customers and the activities involved with prospecting include identifying and contacting prospective customers.

Q. What is a lead?

A. A lead is a person who is interested in buying a product. Leads are generated from marketing efforts such as direct mail and require a level of qualification to determine the leads' interest. A lead is a person who you made contact with either through phone, email or a landing page inquiry.

Q. What is direct mail?

A. Direct mail marketing sends a message directly to prospects in an attempt to communicate a message. It focuses on driving purchases attributed to a specific 'call to action'. For example, call me for additional information, or visit my advisor's landing page. Click here **to learn more about direct mail.**

Q. What is drip marketing?

A. Drip marketing is a direct marketing strategy that relies on repeated contact with a prospect. Successful drip marketing is a deliberate and planned series of communications to a prospect that will get your message across and keep your name in their mind. Drip marketing provides you with a relatively low cost way of making contact with a large number of potential customers without wasting a lot of time on marketing and is the foundation of Prospect-Pro Basic.

Q. Why does drip marketing take so much time?

A. One of the advantages of drip marketing is to build awareness in the mind of your prospect and educate them about your services while building trust in your name or company. Slowly and repeatedly engaging prospects with your message is an effective way to get their attention. This requires you to make repeated communication to your prospects over a planned period of time.

Q. Where are my leads?

A. In week 1 of the prospecting cycle, prospects will be available in the 'My Contacts' tab in the control panel. You can view the entire list of your prospects by clicking on the 'My Contacts' tab in the control panel and browsing by contact type prospects. These contacts are prospects, meaning you have not yet made contact and will need to identify if they are interested in the product you are selling by sending them letters and speaking with them over the phone, if a phone number is available. When you receive a call from a prospect or any other form of communication, change the status of that prospect to a 'lead'. You can make this change by clicking the 'My Contacts' tab in the control panel, search for the specific contact and change their status to 'lead' in the drop down menu.

Q. When will my prospects reply?

A. There is no set time frame for expecting to hear from a prospect. The goal is to repeatedly communicate with the prospect to generate awareness of your name.

Q. Why do I only have a few numbers?

A. We only provide numbers if they are not listed on the national DNC registry. It is estimated that over 171 million people have their number listed on the DNC. Therefore, it is normal to only have 5, 10 or 20 follow up phone calls for prospects. Prospect-Pro is a direct mail based marketing system and is set up for you to reach those who are listed on the DNC through mailings. This expands your prospecting pool because you are not just limited to prospects who are not on the DNC.

Q. How does the DNC work?

A. Consumers can permanently put their phone number on the DNC registry by entering their phone number on the DNC website. Before we provide you the data, we run it through the DNC database. Also, we cross reference the data with the DNC registry every 30 days as federally mandated to telemarketers by the DNC. For more information, click here to visit the DNC website or view the demo video on the support page titled 'DNC'.

Q. What are the system requirements?

A.

- **512MB or better RAM**
- **Broadband internet connection**
- **Windows XP or Vista**
- **Compatible web browser (Internet Explorer 6+, or Mozilla Firefox 3+)**
- **Word processing software (Microsoft Word, Word Pad, etc.)**
- **Firewall allowing Advisor's Pro-Shop**
- **Black and white or color laser or ink jet printer with ink cartridge**
- **Letterhead or plain paper**

- Stamps for letter (or you can have the letters mailed at a post office).

Q. What happens if I don't log in?

A. It is imperative that you login within a reasonable time (no more than 5 days) as soon as you purchase the product. Once the product is purchased, the CRM subscription begins. Also, once you complete the Action Item of 'Set up your Prospecting Preferences', the system places your order on the first available Friday at midnight and your prospects are available the next Monday. With Prospect-Pro Basic, you have a one week period to complete each Action Item before the system moves on to the next and you will not have access to the prior Action Item of 'Creating your Letters'. For that reason, you have to login at least twice a week so as to not delay any important Action Items from being completed and to get the most from your prospecting system. With Prospect-Pro Premier, the Action Items do not expire.

Q. I entered the wrong e-mail address, can I change this?

A. The email address that you entered upon purchase of Prospect-Pro is permanent and cannot be changed following the purchase. This email address will be your login, as well as the email that will be displayed on your letters and landing page. We recommend that you chose the email address that is most often used as your business contact. If you typed in the incorrect address, contact customer support to have it corrected. Also, if you are unable to receive the verification email, contact customer support.

Q. I'd like to use a new e-mail address; can I change my e-mail login?

A. The email address that you entered upon purchase of Prospect-Pro is permanent and once purchase is complete, it cannot be changed. This email address will be your login, as well as the email that will be displayed on your letters and landing page. We recommend that you chose the email address that is most often used as your business contact. If having your email changed is a significant issue, contact customer support.

Q. How do I place an order for Prospect-Pro Basic?

A. You may order Prospect-Pro, or any other Advisor's Pro-Shop products, at http://shop.fmgdata.com. Prospect-Pro is located in the Sales and Prospecting category, under the Prospecting and Lead program link. We recommend that you spend a few moments reading the product details to familiarize yourself with the system and allow for an ease of transition. Once you are prepared to acquire Prospect-Pro, select the version that correlates with the line of insurance that you specialize in by making a selection from the list of target markets. Note that you may not change the version you have purchased once you buy the program. You will then select your subscription length.

Q. Can I reset my account if I have never logged in?

A. Occasionally, a Prospect-Pro subscription is assigned to an Advisor, or purchased by an Advisor, who doesn't use the program. Advisor's Pro-Shop can "reset" an unused Prospect-Pro (Basic) subscription for an Advisor under the following condition:

- **If the Advisor has been issued a subscription and they have not yet configured their prospecting preferences, and the subscription has not yet expired. (Time still remains on the CRM)**

If the Advisor *has* configured their prospecting preferences, no refund, cancelation or reset can be given. Please refer to our terms and conditions listed on our website and user manual for more details. Note: This policy is part of the "Terms of Service" section on the APS website, and is agreed to before the Advisor enters a coupon code or form of payment.

Q. My subscription has expired, how do I renew my account?

A. To renew your expired subscription:

1.) Please go here: http://shop.fmgdata.com .

2.) In the orange header on the top of the page, please "login" using your username and password.

3.) Type in your username and password and click the small orange login button

4.) On the left hand side of the screen under "Categories" please select "Sales Tools and Documents" then "Prospecting and Leads Programs".

5.) Choose the product that you would like to renew, either basic or premier.

6.) Select your target market and subscription length, or your mailing size.

7.) Proceed with the checkout process and purchase of your program.

This will update your current account. You will receive emails indicating this is completed. Please make sure that our email is not being delivered to junk mail or spam folders. Note that you have a 90 day window to renew before you will loose the prospects that you already acquired.

Prospect-Pro Premier

Q. How do I place an order for Prospect-Pro Premier?

A. You may order Prospect-Pro Premier, or any other Advisor's Pro-Shop products, at http://shop.fmgdata.com. Prospect-Pro Premier is located in the Sales and Prospecting category, under the Prospecting and Lead program link. We recommend that you spend a few moments reading the product details to familiarize yourself with the system and allow for an ease of transition. Once you are prepared to acquire Prospect-Pro Premier, select the version that correlates with the line of insurance that you specialize in by making a selection from the list of target markets. Note that you may not change the version you have purchased once you buy the program. You will then select your mailing amount.

Q. How do I upgrade to Prospect-Pro Premier from the basic version?

A. You cannot upgrade to Prospect-Pro Premier once you have purchased the basic package.

Q. Can I upgrade to Prospect-Pro Premier during week 3 of Prospect-Pro Standard?

A. You cannot upgrade to Prospect-Pro Premier once you have purchased the basic package.

Q. How long will I have access to my CRM account?

A. Included in every mailing is a 90 day CRM subscription. For example, if you did a 250 piece mailer, a 90 day CRM subscription would be included in the mailing. If you ordered another 250 mailer one month later, you will have access to the CRM an additional 90 days.

Q. Can I send more letters to the first set of prospects?

A. With Prospect-Pro Premier, you will be mailing to your selected quantity of prospects only once.

Q. Can I use my own letterhead in Prospect-Pro Premier?

A. No, you cannot use your own prepared letterhead, you can only use the letterhead that we provide for you. This letterhead can be edited in step 1 if the "Prepare Your Mailing" Action Item.

GETTING STARTED

Q. Why do I need to verify my email?

A. It is critical that you follow the verification link that is sent to your email, by doing this you ensure that you will get critical system notifications, such as past due Action Items and prospects who visited your landing page. Failure to verify your email address will disable your ability to be notified. Be sure that you verify your email address immediately upon purchasing the system. After purchase, you will automatically get an email to the email address you used at time of purchase requesting you to verify your email address. If you don't verify your email address, you will see a notification at the top of the Control Panel reminding you of this.

Q. I am getting a notice that my email has not been verified, what do I do?

A. These are the steps that you will take to verify your email.
1) Login to your account from Advisor's Pro-Shop.com.
2) On the top of the control panel you will see a box with red text prompting you to click the 'Send Verification E-Mail' button.
3) By clicking this button you will receive a verification email in your account with a link to verify your e-mail.
4) After clicking the link, close your Prospect-Pro window and log back in again.
You may also want to ensure that the verification e-mail is not in your junk mail and mark messages from notify@advisorspro-shop.com as not spam.

Q. Email Troubleshooting

A. Please check your junk mail filters, and internet security software's to ensure that emails from APS Notify and Advisors Pro-Shop are not being blocked. In most cases, missing emails from APS can be found here. Also, it may be possible that your Internet Service Provider (ISP) is currently blocking our emails. Please forward the following to your customer support at your ISP*: I have signed up for a service with Advisor's Pro-Shop and you are blocking their e-mails originating from: notify@advisorspro-shop.com (IP Address 74.0.229.9). Please white list this domain and IP address so I may receive e-mails from them.* If you still cannot get email from us, please contact customer support and request that your email address is changed to one of the free following accounts: Hotmail, Yahoo, Gmail or MSN.

Q. Why do I need to verify my profile details?

A. The first Action Item that you are prompted to complete is the 'Verify Profile Details'. This to-do is essential because these settings will appear on your prospecting printed documents and landing page. Verify that the information is exactly how you want it to appear to your contacts. You may

change your profile details at any time by clicking on the 'My Preferences' tab on your control panel.

Q. How do I change my password?

A. You may change your profile details at any time by clicking the 'My Preferences' tab on your control panel. Click the 'Edit My Profile' link and update your information.

Q. How do I set up my landing page?

A. Setting up your Advisor's landing page is one of the first Action Items that Prospect Pro will prompt you to complete. In the Action Item's control module, click on the 'Setup Your Landing Page' link. This will take you to a step by step guide to selecting your landing page style, editing your page text and graphics, and selecting your notification preference. You can make changes to the landing page at any time through the 'My Preferences' tab.

Q. I want to write my own welcome message on my landing page, how do I do this?

A. You can customize the message that prospects see when they visit your landing page by clicking the 'My Preferences' tab on your control panel and selecting the 'Edit Landing Page Details' link. Advance to step 2 and enter your personal message or a combination of the message that is provided for you by pasting the recommended text into the text box.

Q. How do I upload my own photo to my landing page?

A. You can customize the photo that prospects see at the top of the page when they visit your landing page by clicking the 'My Preferences' tab on your control panel and selecting the 'Edit Landing Page Details' link. Advance to step 3 and select the 'Click Here to Upload Your Photo' Link. Note that the photo is separate from the logo and appears on the top of your landing page, must be 200 pixels by 200 pixels and you cannot revert back to the default photo once changed.

Q. How do I upload my own logo to my landing page?

A. You can customize the logo that prospects see near the middle of the page when they visit your landing page by clicking the' My Preferences' tab on your control panel and selecting the 'Edit Landing Page Details' link. Advance to step 3 and select the 'Click Here to Upload Your Logo' Link. Note that the logo is separate from the photo and appears near the middle of your landing page, must be 200 pixels by 200 pixels. There is no default logo.

Q. How do I know when someone had visited my landing page?

A. A prospect that has gone to your landing page will have the ability to request additional information about your services, product brochures or update their contact information. Once they complete the page, they are redirected to a success page informing them that you will contact them ASAP. This form will trigger an automatic notification to your preferred method of contact, email, text message or both. To obtain the best results, we recommend that you respond within minutes to a notification.

Q. How do I preview my landing page before I finalize it?

A. You are given the opportunity to preview your landing page before you complete it during the set up process. The final set up page 'You have now completed the Create your Landing Page Action Item', provides you a link on the bottom left side of the page to preview the page. The link will open a separate window that requests you to enter your Advisor's email, which is also your login email. If you are satisfied with the appearance of your landing page, return to the Action

Item of Creating your Landing Page and click finish. If you would like to make any changes to your Landing Page, click back through the set up process and make the desired changes.

Q. What is a primary zip code?

A. This is the starting zip code that the system will use as the center point for locating prospects. Reference the demo video titled 'Setup Prospecting Program' in the support section to learn more.

Q. What are the demographics that I can choose from?

A. Prospect-Pro provides you with a simplified method of selecting specifically who you wish to talk to. You can select from two different classification models that are explained step 3 in the 'Setup Prospecting Preferences' Action Item. Reference the demo video titled 'Setup Prospecting Program' in the support section to learn more.

Q. I configured my prospecting program, now what?

A. Once you complete the Action Item 'Setup Prospecting Preferences', the system designates the data as prospects that belong to only you. Prospect orders take place every Friday at midnight. You can begin working with them that following Monday, which will begin week 1 of the 4 week cycle. With Prospect-Pro Basic, there will be an Action Item titled "Create Letter-Prospect Week 1" in the Control Panel. If you are using Prospect-Pro Premier, there will be an Action Item titled "Prepare Your Mailing" in the Control Panel. Note that nothing will be emailed to you, other than a log in reminder; you will have to log in to access the prospects.

MY PRO SHOP

Q. What are Action Items?

A. Action Items are quite simply, things that require you to take an action. Your control panel communicates with you things that you need to complete by sending you Action Items. Action Items in Prospect-Pro Basic are time sensitive and require you to complete them within 7 days. Action Items in Prospect-Pro Premier do not expire.

Q. I see an Action Item highlighted in blue; what does this mean?

A. New, uncompleted Action Items are highlighted in blue and display a 'NEW' icon on the right. You must complete this Action Item within 7 days to keep the system up to date if you are using Prospect-Pro Basic.

Q. How do I retrieve my list if I missed the Action Item 'Create your Letters'?

A. The Action Item of 'Create your Letters' will perform an automatic mail merge for you and will be unavailable after 7 days. At this point, the system has moved on to the next Action Item of 'Phone Prospect'. Your option at this point is to perform a manual mail merge to get back on schedule. Reference the manual mail merge step by step process on page 42 of the user manual.

Q. What happens if I delete a completed action item?

A. You have the option to remove a completed Action Item from your Action Items list by clicking the 'Del' button. If you need to you can revisit an old or deleted Action Item to make a change in the 'My Preferences' tab in the control panel.

Q. What does the red exclamation point on the left side of the Action Item mean?

A. A red exclamation point indicates a critical Action Item that requires immediate attention and does not necessary mean that the Action Item is incomplete. The exclamation point will remain intact even after you have completed the Action Item.

Q. Why do the Action Items remain in my control panel after they are complete?

A. Completed Action Items will remain in the control panel and will move to the end of the list; however you do have the option to delete them for clarification purposes. On the right side of the Action Item is a 'del' button that will remove the Action Item from your control panel after you verify that you do want to delete it.

Q. I've entered a sale; when will it appear in the dashboard?

A. You can enter a sale for a contact in the CRM. After the sale is entered, it will appear in the control panel in the dashboard under sales.

Q. Why does my start date and end date in my account details reflect a period longer than 4 weeks?

A. Your 4 week prospecting cycle begins on the date your prospects are provided to you. If you purchased your Prospect-Pro on a Tuesday, your CRM is available to you immediately and the prospecting cycle will begin the following Monday.

Q. I set up my prospecting area on a Thursday, why do I have to wait until the next Monday?

A. The Prospect-Pro system is set up to order the data every Friday at midnight. If you ordered your prospects on a Sunday, your order won't be placed until the next Friday. Once an order is placed, you may not cancel the order, or change your prospecting preference setup.

MY CONTACTS

Q. How do I search for a specific contact?

A. You may search for a contact in the 'My Contacts' tab in the control panel. You may search by first or last name or do a blank search to view all of your contacts.

Q. I have an excel file of my existing contacts; can I add it to the CRM?

A. To import your contacts in bulk (more than 1): in the Control Panel, click on the "My Contacts" tab and click on the link "Bulk Import Contacts". The system will allow you to import a pre-formatted .csv file that matches the required format as indicated on that screen. You must pre-format your .csv file properly, or the import will fail and you will get an error. Follow the instructions on the screen to import your contacts.

Q. How do I edit a specific contact's information?

A. You may edit a contact's information by searching for the contact in the My Contacts tab in the control panel. You may search by first or last name. Edit the information and click save. This contact will now appear in the recent contacts section on the control panel.

Q. I have scheduled an appointment with a prospect; how do I enter the activity?

A. There are two ways to enter an activity with a contact. One, when you perform the Action Item of 'Phone Prospect' you can enter the activity in the phone script. The second way to schedule an appointment is by searching for the contact in the 'My Contacts' tab in the control panel and adding an appointment in the activities section.

Q. Where do my scheduled activities appear?

A. After you schedule an activity (phone calls, meeting, and follow ups) with a contact it will appear in the calendar section of the control panel. You may access the activity there and directly go to the contact's details page.

Q. How do I add just one contact?

A. You may add one contact to your CRM by clicking on the 'My Contacts' tab in the control panel. Select the link 'Add New Contact' and enter the contact's information.

Q. What happens when I choose to export my contacts?

A. You may export any contact in any status from your CRM. Note: Doing this will break constant updates from taking place on your record; you will no longer be notified of a contact's address change or other information that changes over time. Use the 'Export Contacts' link in the CRM to export your contacts. This action is used when you are performing a manual mail merge.

Q. How do I change a contact's status?

A. **Locate the contact that you wish to modify either by viewing recently viewed contacts, doing a search for a contact, or doing a blank search for a contact. Change the status of the contact accordingly. A prospect will be a part of the marketing cycle and will be sent letters. A lead, customer, address or deleted status will not be a part of the marketing campaign.**

Q. What does a recent contact mean?

A. The recent contact section on your control panel simply identifies the contacts that you have recently viewed, not necessarily spoken with. It is a tool to assist you to quickly access a contact that you are in the process of working with, without having to search for them.

Q. How do I add a referral to my list of contacts?

A. As you get referrals from your customers, you'll want to track who gave you one. Add the new referral as a prospect in the CRM. Select the contact and use the 'Referred By' drop down box to select the person who referred the contact you're working with.

Q. I want to see a list of all of my prospects/leads/customers; how do I perform this?

A. Access the CRM through the 'My Contacts' tab in the control module and do a blank search in the search field. This will display the entire list of your contacts. The list is alphabetized with the most recent list appearing first.

Q. How do I enter a sale?

A. It is highly recommended that you enter every sale you make with a contact, as the system can then help remind you when it's time to follow up with a customer at policy renewal time. You can add a sale in the Advisor's CRM easily by locating the person you've sold to (by a search or by

clicking on a recent contact). You can add sales for a contact in more than one place in the system including:

- During a follow up phone call
- From their contact info screen in the CRM under 'Sales'

Use the add button to open the add sale screen. Add

Q. I've entered a sale; when will it appear in the dashboard?

A. You can enter a sale for a contact in the CRM. After the sale is entered, it will appear in the control panel in the dashboard under sales.

MY DOCUMENTS

Q. Where are my letters and scripts located?

A. All of the documents that you will use are located in the 'My Documents' tab in the control panel. There are four documents already provided to you: two letters and two phone scripts and they are located in the purchased letters menu. Refer to the demo video titled 'My Documents' to learn more.

Q. Can I create new letters or scripts or make changes to the provided letters?

A. The 'My Documents' tab also allows you to enter in your own letters; follow the steps provided here and refer to the demo video titled Customizing a System Provided Letter in the support section to assist you.

- In the Purchased Letters section, select the letter that you are using.
- Open the letter as a Word Document. Click Ctrl + A to select the entire letter and then Ctrl + C to copy the letter.
- Go back to the 'My Documents' tab and in the 'User Letters' select Add. Delete all of the text in the text box and hit Ctrl + P to paste the letter.
- Make any changes to the letter now.
- After you have made the changes, give the letter an appropriate title and save the letter.
- Then, go to the 'My Preferences' tab in the control panel and click on 'Edit Default Prospecting Documents'. Find your new letter in the drop down menu for the week you are in and select it to be used. Then, go back to the Action Item of creating letters and the system will now use your new letter.

Q. How do I upload a letter that I have on file to my available documents?

A. You can easily add new documents such as letters, scripts, etc. by clicking the Add button at the on the right side in the 'My Documents' Control Tab. Clicking the Add button opens another panel that enables you to either compose from scratch, or paste a document you may have composed and formatted in another text editor, like Microsoft Word.

Q. Can I change the email address that is printed on the letters?

A. The email address that was provided during the login process is the default email that will be used as your contact email. It will be documented on your letters as well as your landing page information. The email address is permanent and cannot be changed once established.

Q. What are merge fields and how do I operate them?

A. A merge field is a code inserted in a letter which determines the data to be placed at that point. An example is [My_CompanyName]. In order to have the specific information entered, the data needs to be located in your profile details.

Q. What do I do when I receive non deliverable letters back to my address?

A. Most direct mail lists attribute approximately a 2-3% undeliverable rate, independent of mailing size. There is a simple process that you may take to remove the undeliverable addresses from your list of contacts.

- Access the contacts by doing a search in the 'My Contacts' tab in the control panel. You will have to search for each contact individually.
- Once you are in the screen that shows all of the information about the contact, change its status from prospect to deleted in the status drop down box that is located at the top left of the screen.

This action will delete the contacts from your list of available prospects to market to, although the prospect will still be searchable, just not included in your marketing programs.

MY PREFERENCES

Q. How do I add my sales goals?

A. Go to the 'My Preferences' Tab, and click on 'Edit Annual Goals'. Click on the year you wish to view or edit. Enter the sales figures you want to target. You can view a visual illustration of your actual sales (if you have entered them for a contact) versus where you want to be for a given time frame right on the Control Panel's Dashboard Control Module. Use the Sales meters to see where you are in comparison to your goals. Remember, in order to take advantage of sales goals, and use the guages on the Dashboard, you will need to enter every one of your sales that you earn as you make them in the CRM. If you forget to do this, the system cannot accurately report sales on the meters.

Q. How do I make changes to my landing page?

A. You many change your landing page at any time by clicking on the 'My Preferences' tab on your control panel. Click on 'Edit Landing Page Details' and go through the steps to edit the page.

Q. How do I change my letter printing preferences?

A. You can change your letter printing preferences by clicking on the 'My Preferences' tab in the control panel and select 'Edit Letter Printing Preferences'. Reference the demo video titled 'create letters' that is located on the support page to learn more.

Q. Can I use my own letterhead?

A. You can use paper that already has preprinted letterhead or footers on it. While you are in step 2 of the Action Item 'Creating your Letters', choose Option B. Before you print all of your letters, experiment by printing just one letter to make certain that the letter will fit within your letterhead and adjust the margins or delete any text if needed. Reference the demo video titled 'create letters' that is located on the support page to learn more.

Q. Are your letters approved by my compliance department?

A. Every carrier has a compliance department and we are not in compliance with every one. Currently, our letters and landing page are in compliance with Allianz and Country Financial (6/24/09). If your compliance department mandates approval of any outbound letters, you have two options to ensure you are in compliance.

- Send a request to our customer service department to receive the letters before you subscribe to ensure you are in compliance.
- Start the subscription and send the letters to your compliance department. This may result in a delay of completing the Action Items.

Q. Do you offer a full print service?

A. Prospect-Pro Premier is the full print service option. If you are a subscriber of the standard Prospect-Pro, you are not able to upgrade to the full print service.

Q. I want to change my prospecting specifics before I receive the prospects, can I do this?

A. You are able to change your prospecting preferences *only if it is before Friday at midnight.* Before this time you can change the demographics or search radius in the 'My Preferences' tab in the control panel. If it is after Friday at midnight, the prospects have been ordered and will be delivered to your CRM on Monday.

Q. Can I change my prospecting radius for my next set of prospects?

A. After you have received a set of prospects, you can make changes to the *next* set of prospects that you will be receiving in 4 weeks. Go to the 'My Preferences' tab in the control panel and select 'Edit Prospecting Search Radius' to make changes to the zip codes or distance. Or, click on 'Edit Prospecting Search Demographics' to change to the other demographic option. These changes will be put into effect for the next set of prospects.

Q. How can I receive notification text messages?

A. Text message notifications are available to alert you that a prospect has been to your landing page and has submitted the form for more information. You have two notification options: email only or email and text message. To receive text message notifications click on the 'My Preferences' tab in the control panel and select 'Edit Notification Preferences'. Select Option B and enter your 10 digit cell phone number and the carrier. Alternately, you can select this notification while completing the 'Setup your Landing Page' Action Item. To cease text message notifications, select Option A, email only.

Q. How do I change the letters or scripts that I send out?

A. If you would like to use additional letters other than what is provided to you by default, you can specify which letters the system uses when performing an automatic mail merge. Click on 'My Preferences' in the control panel and select 'Edit Default Prospecting Documents'. You can change which letters or scripts that the system uses each week by choosing from the drop down menu. Note that the letters have to be located in the 'User Letters' or 'User Scripts' section in the 'My Documents' tab in order to appear in the drop down menu. Refer to the demo video titled 'My Documents' to learn more.