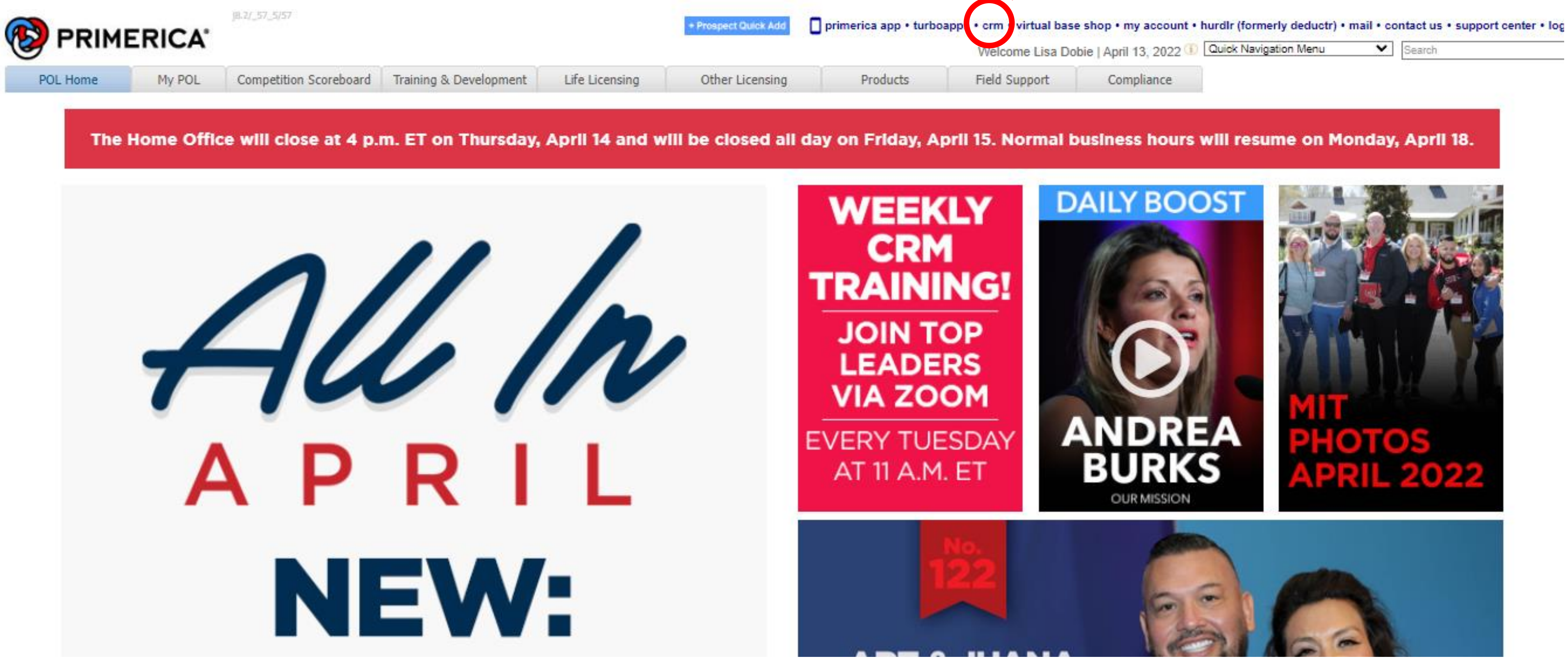
Log into POL & select CRM



Enter SSN

PRIMERICA

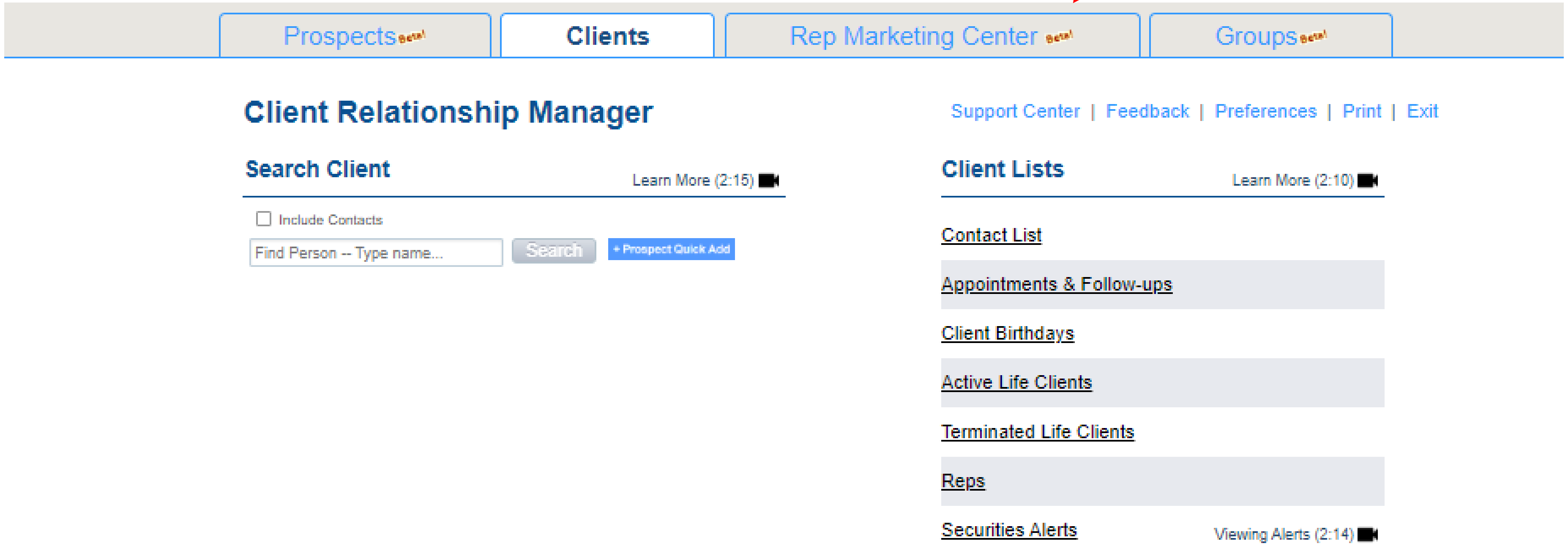
Verify

To better help you safeguard privileged client and business information, we've added a second layer of protection to this section of Primerica Online.

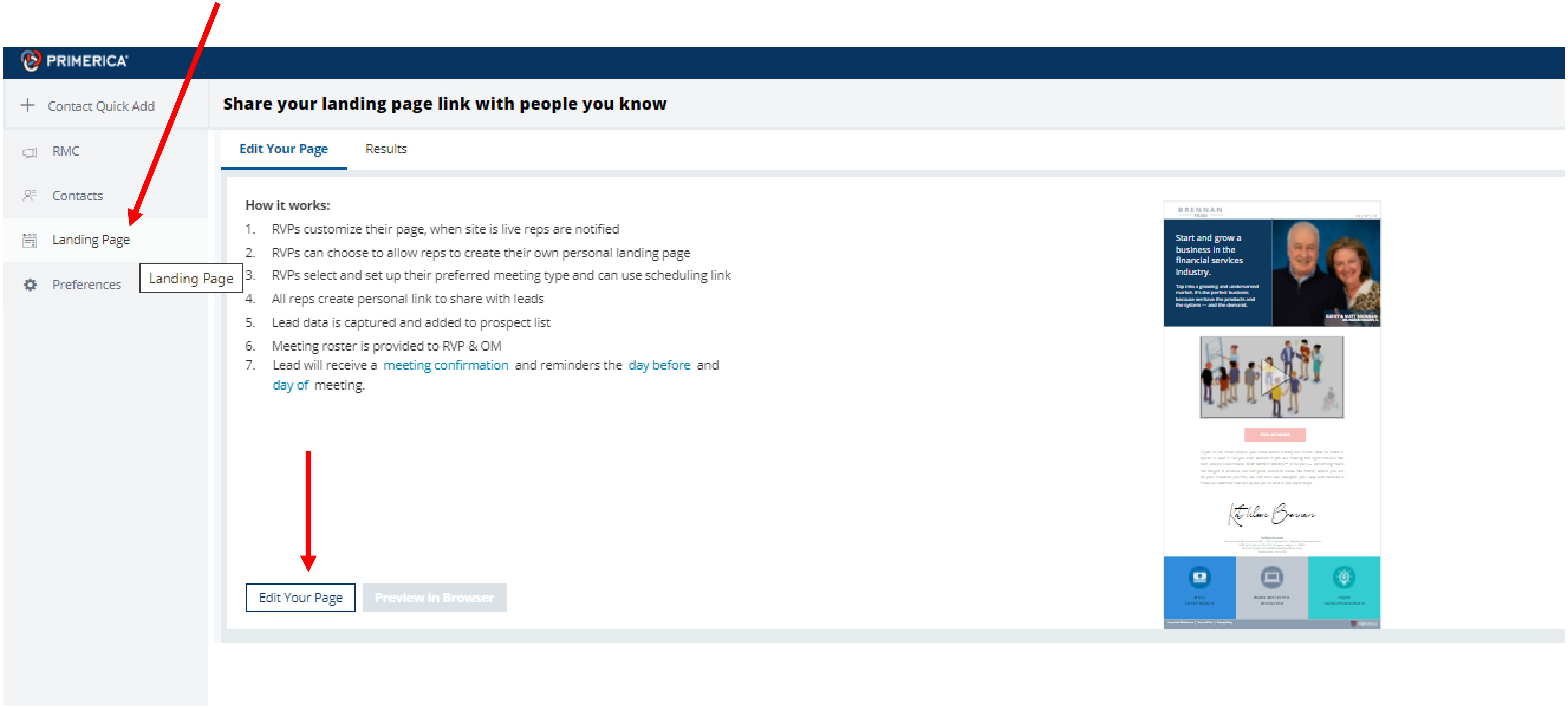
To access this section, please enter **YOUR** Social Security Number. You will be asked to verify your information one time per session.

SSN 555-55-5555 Submit

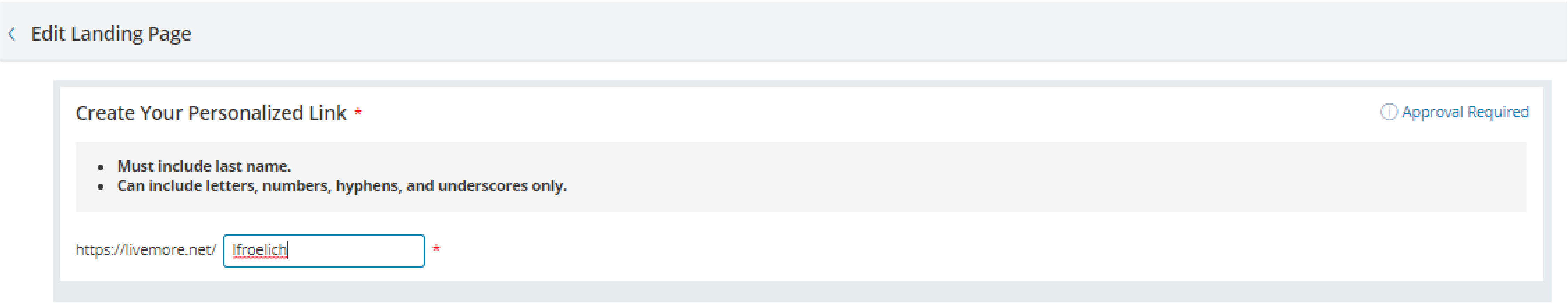
Select Rep Marketing Center



Select “Landing Page” then CLICK “Edit Your Page”



Choose a link. ***Must include your last name***!



Skip for now…we will come back to this

Add Your Scheduling Link

ⓘ Approval Required

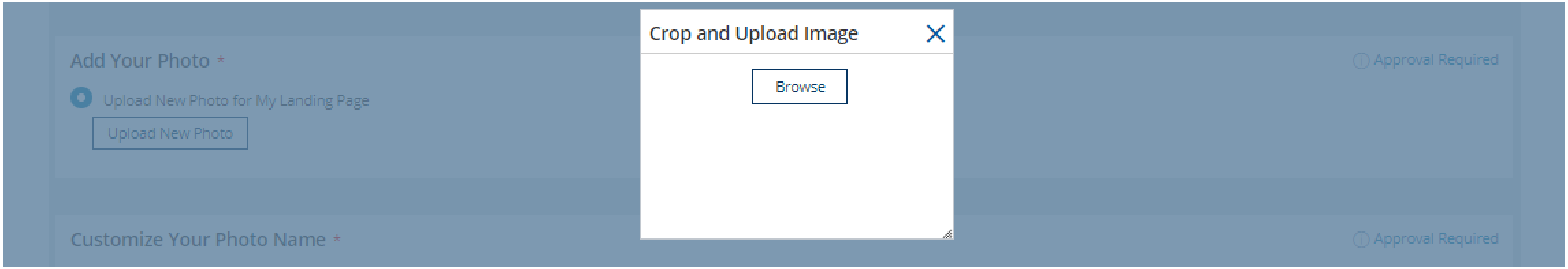
Provide your scheduling link *

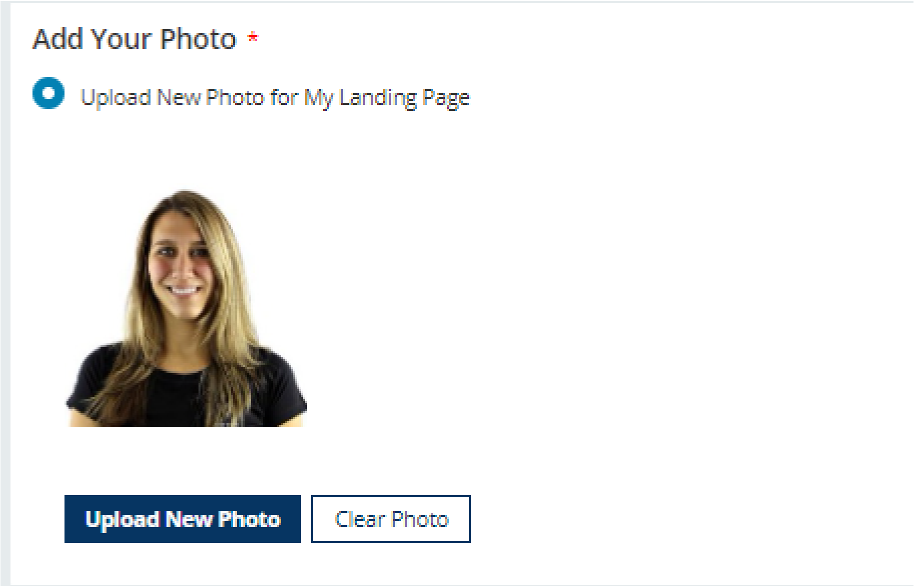
Value can not be blank

☐ By checking this box, I am confirming that the scheduling link, I have added is connected to my Primerica.com email address.

I attest that the meeting link I am providing complies with Primerica's Guidelines for Scheduling Tools.

Upload an Image





Select your name or PEP name

Customize Your Photo Name *

ⓘ Approval Required

If You Uploaded A Photo Including Your PEP (Partnership Empowerment Program) Partner, You Must Include Your Official PEP Name In The Field Below.

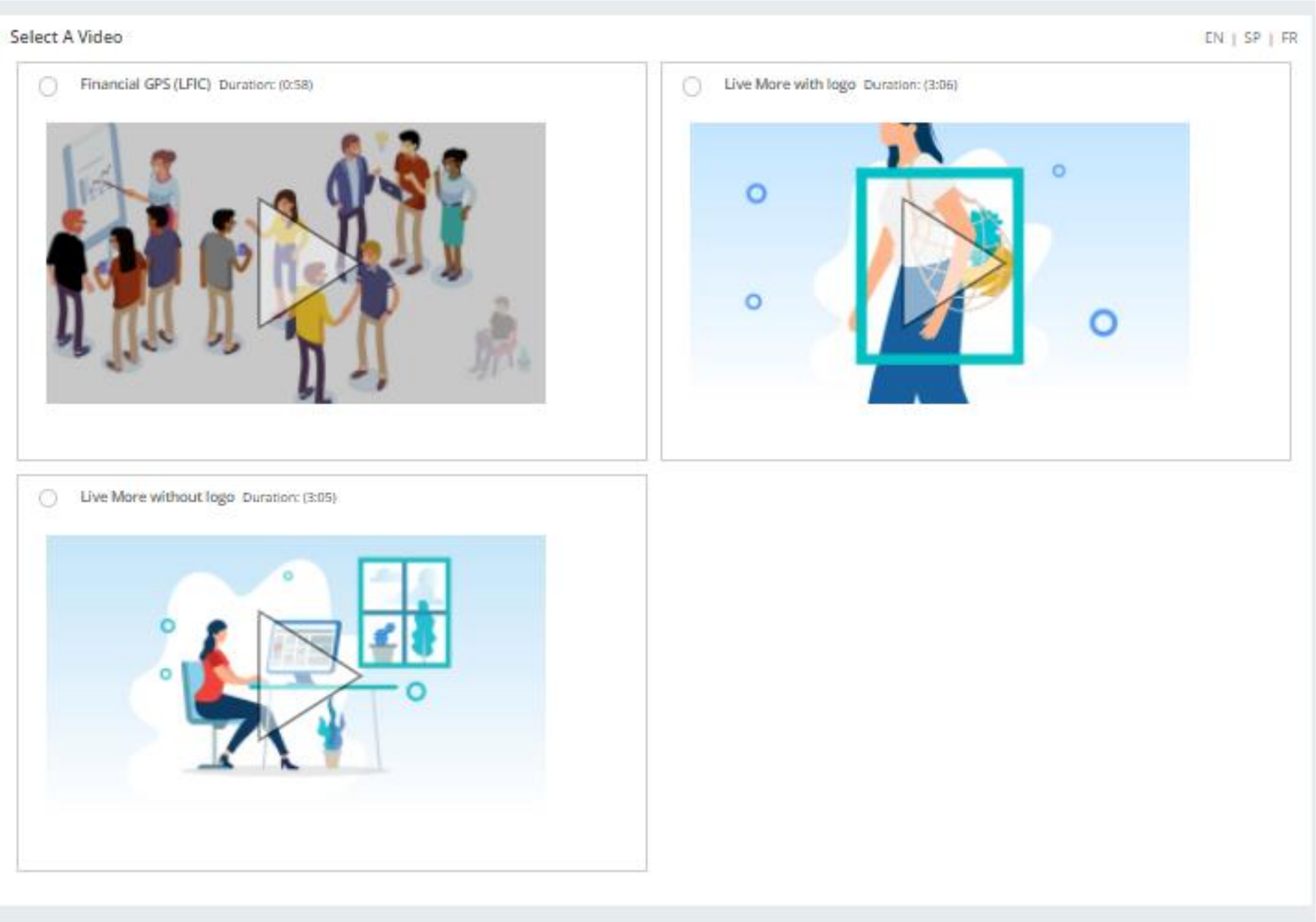
◉ My Name

Name *	Last Name *
Lisa Dobie	Froelich

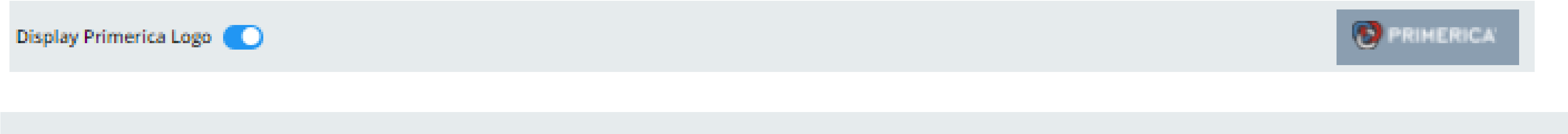
○ PEP Name

If You Uploaded A Photo Including Your Partner, You Must Use Both Of Your Names. Please Review The Pep Name Below And Update If Needed. This Is Only For RMC Display And Will Not Be Changed Anywhere Else. Name Should Be Updated As Follows: 1) Same Last Name: Rep First Name & Partner First Name Last Name 2) Different Last Name: Rep First Name Last Name & Partner First Name Last Name.

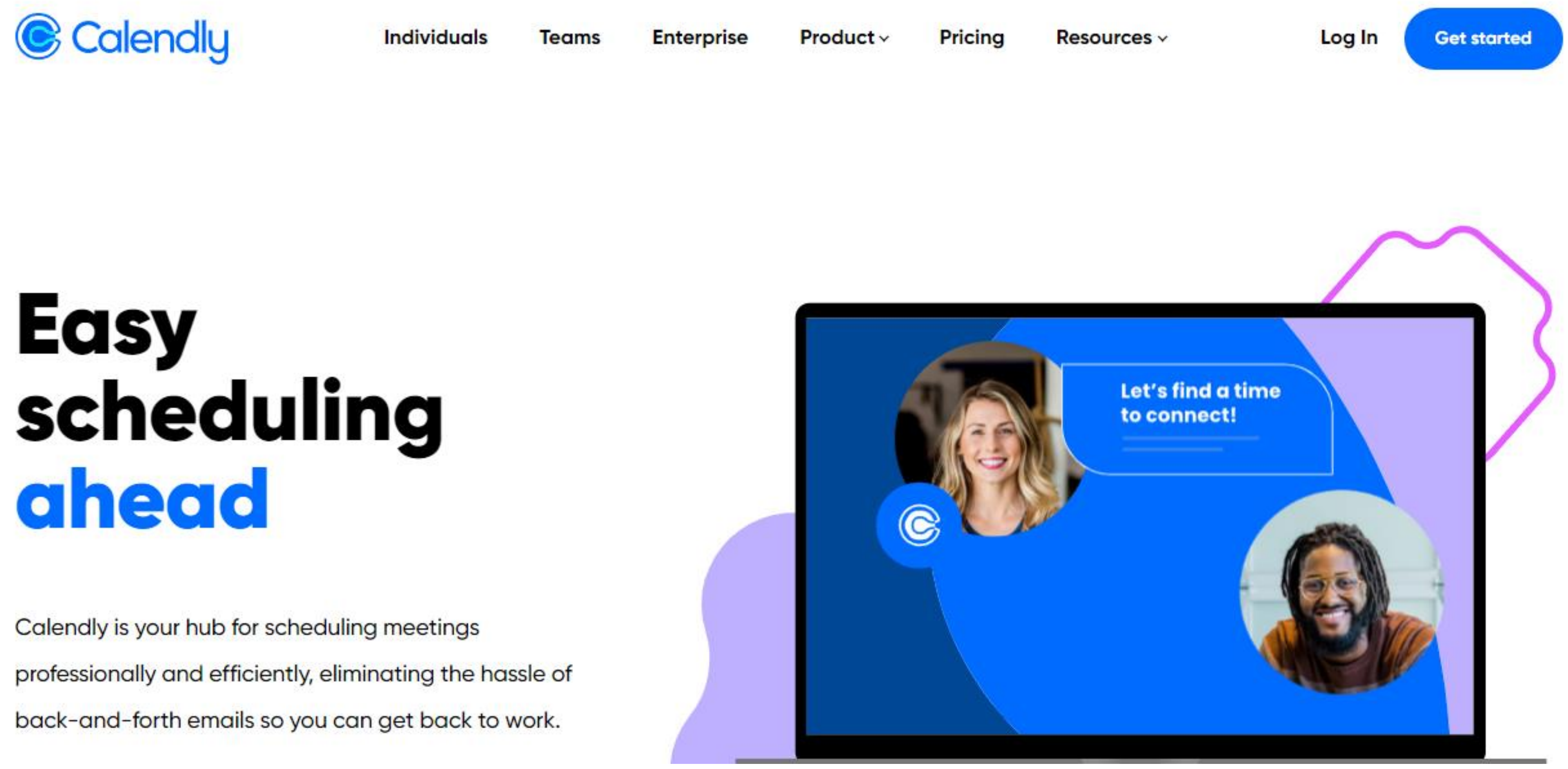
Choose which video you'd like showcased (more to come)



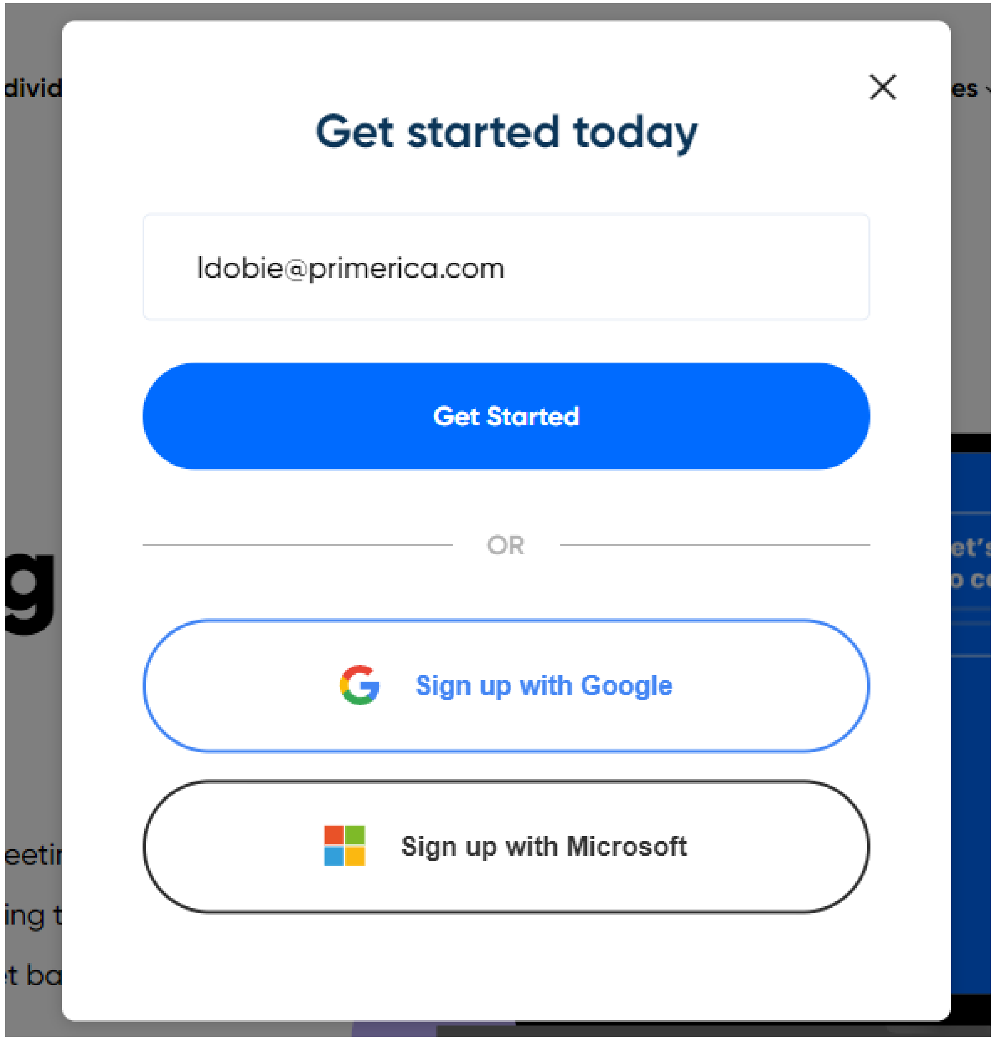
Select whether or not you'd like the Primerica logo on your page



Scheduler – head to Calendly.com

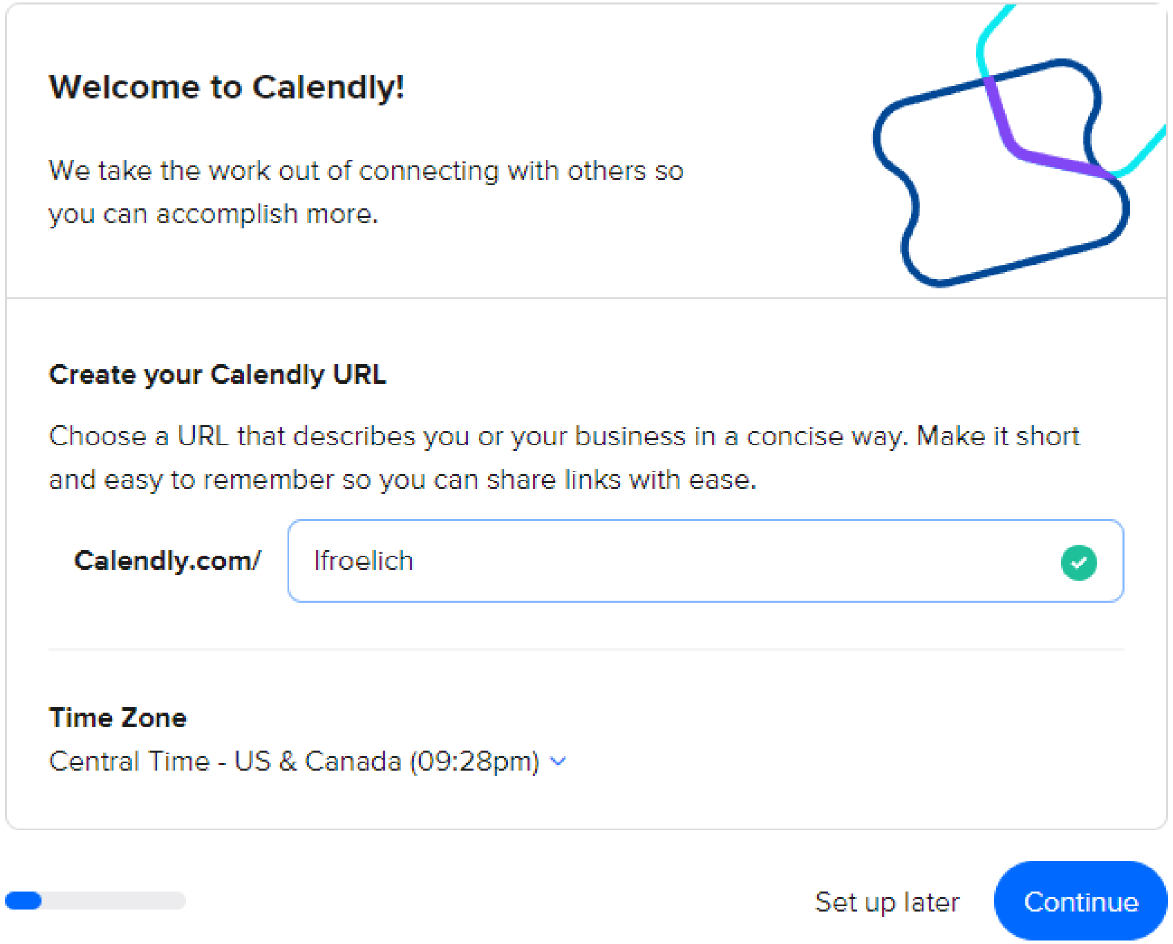


Click the blue GET STARTED button & use your primerica.com email address

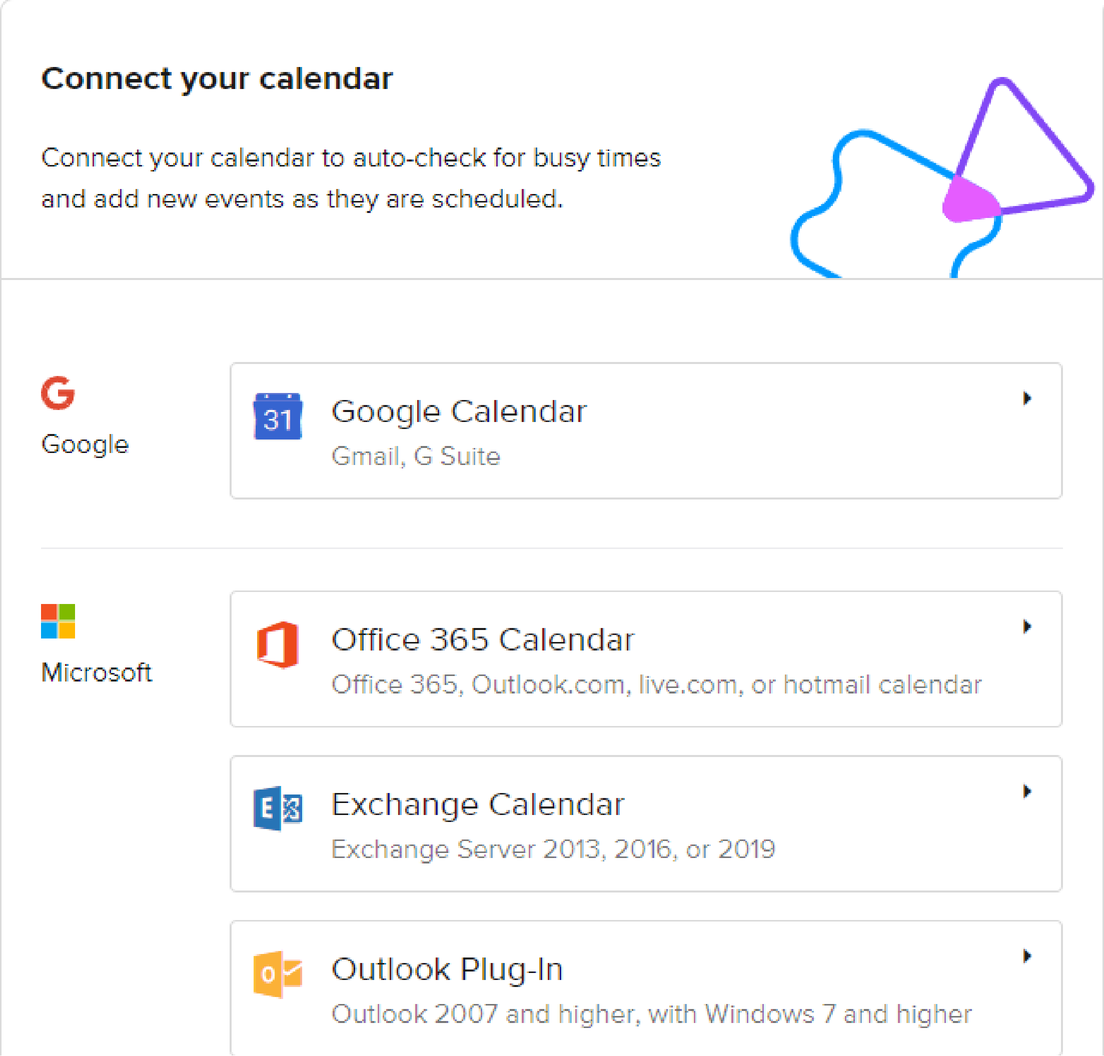


Go to Primerica.com email to confirm your email address

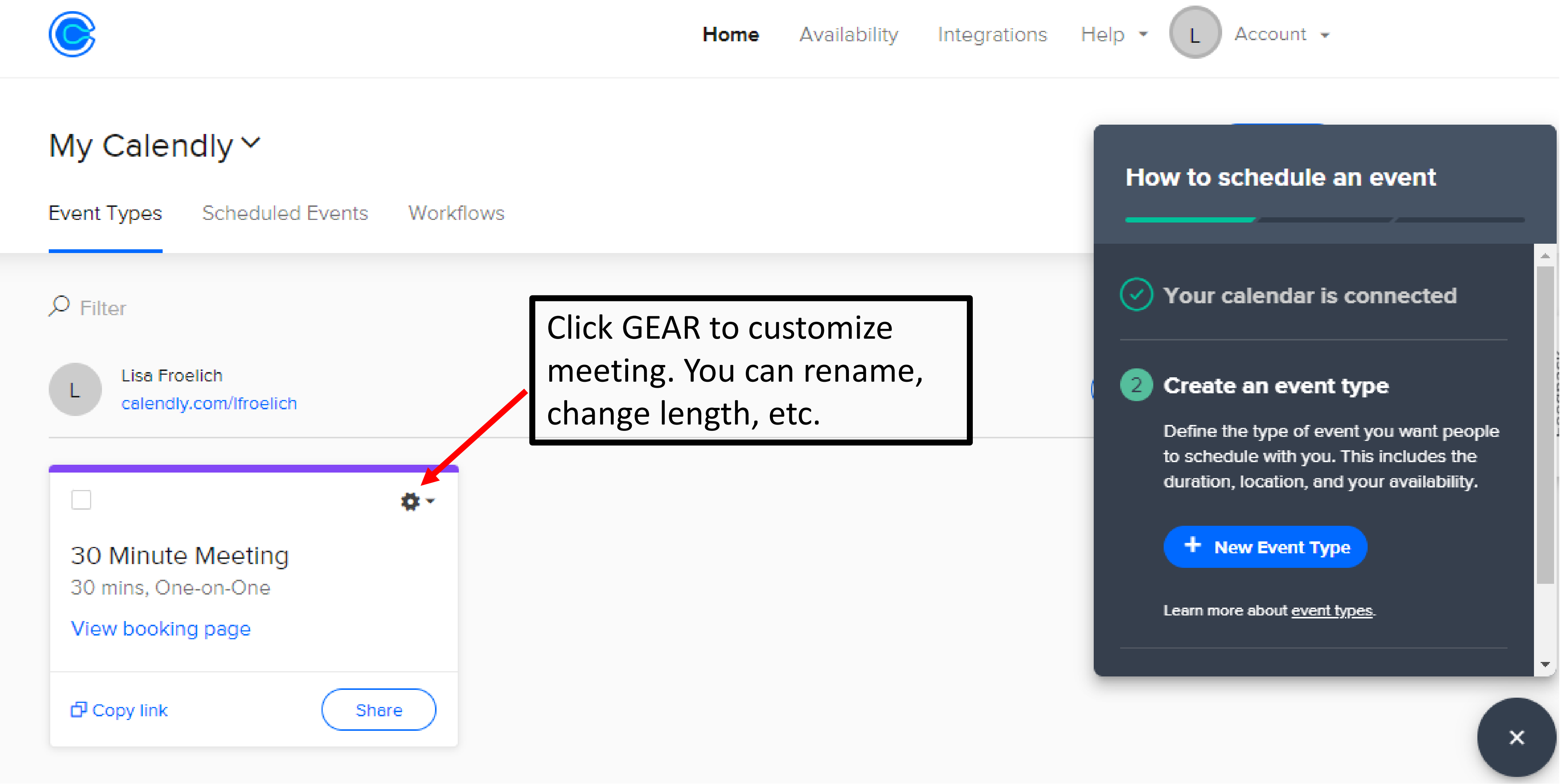
- After you confirm your email…you should get to this page where you can create your link



(optional) connect to an existing calendar

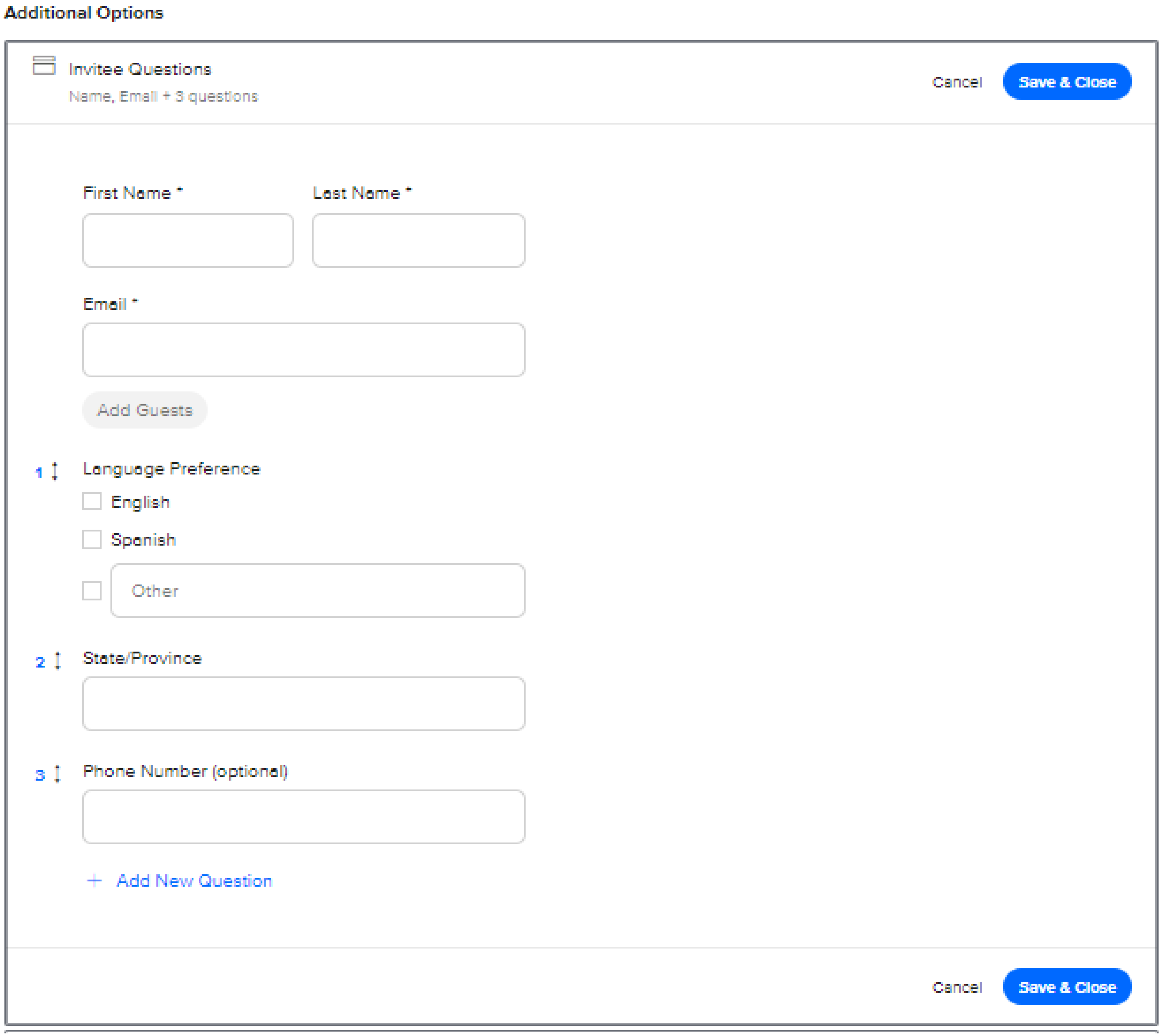


Create your meeting. Free version of Calendly allows 1 meeting type.

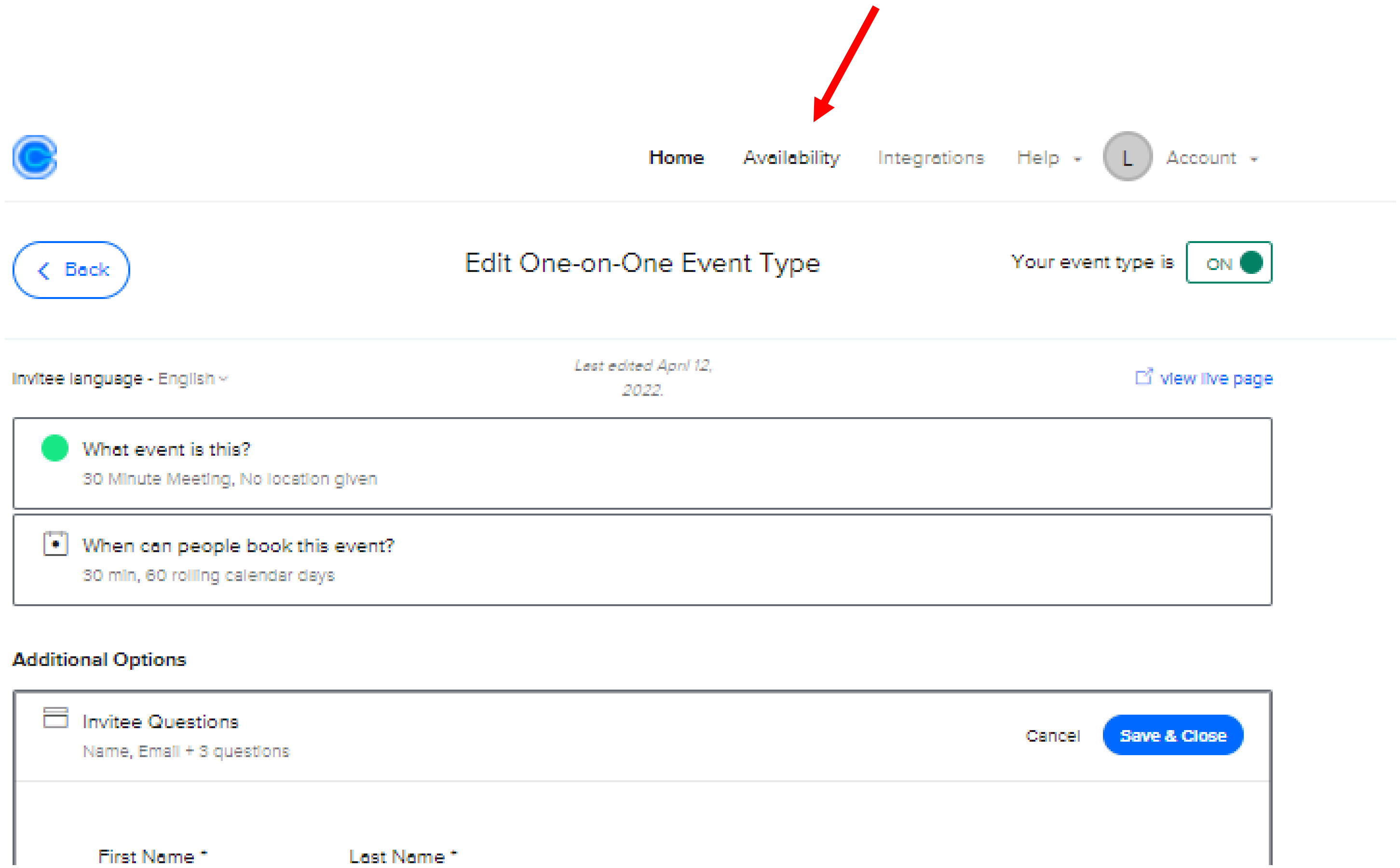


Click GEAR to customize meeting. You can rename, change length, etc.

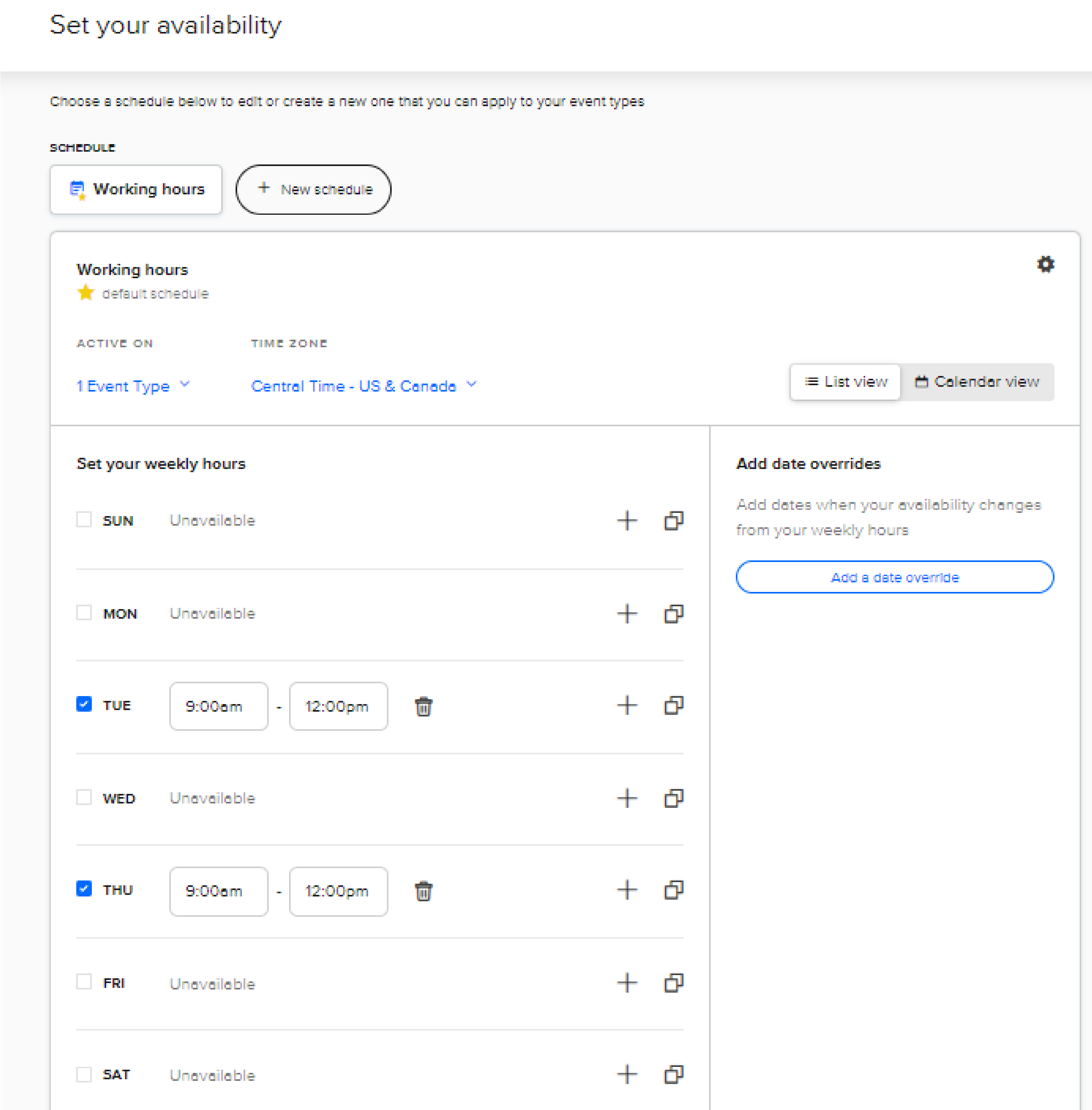
Add questions to make your form look like this:



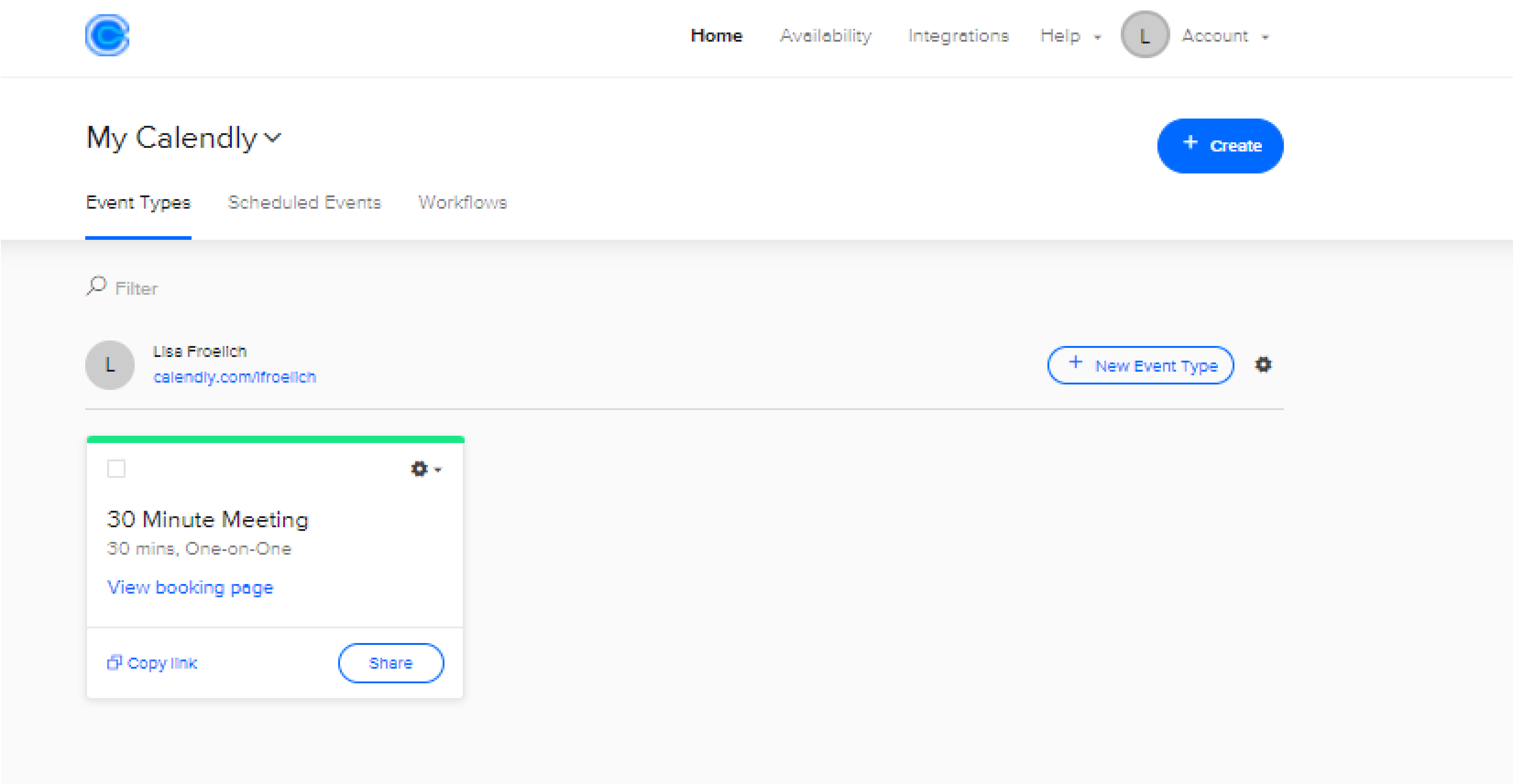
Save, then click Availability at the top



Select the days and times you'll be available. Start with 2 days.



Return to home screen to copy your link



Go back and enter calendly.com address into scheduling link box

Add Your Scheduling Link

ⓘ Approval Required

Provide your scheduling link *

https://calendly.com/lfroelich

Value can not be blank

☐ By checking this box, I am confirming that the scheduling link, I have added is connected to my Primerica.com email address.

I attest that the meeting link I am providing complies with Primerica's Guidelines for Scheduling Tools.

Submit landing page for review!