

*PEOPLE OVER  
PROFITS*

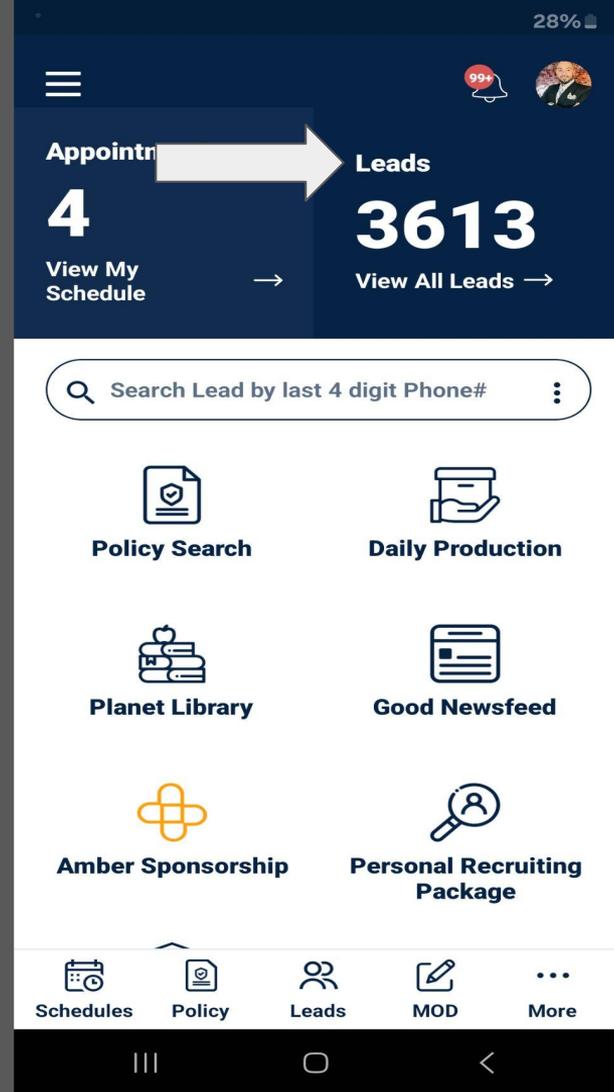


# How to set an Appointment

Mobile Planet App



Once you log into your Mobile planet app, select Leads to enter your lead pool.



In your lead pool find  
the prospect you would  
like to contact

28%

← My Leads

All Leads

Lead Type: All  
Disposition: All  
Sort By: Assign Date (Descending)

**Brown, John** ★  
Palm Bay, FL Veteran  
No Answer on 10/31/2024 @ 5:14 PM

**Caronia, Tiffany** ★  
Fort Worth, TX Veteran  
No Answer on 11/1/2024 @ 7:08 PM

**Caroway, Frank** ★  
Thonotosassa, FL Veteran  
No Answer on 10/31/2024 @ 5:20 PM

**Cheesman, Raymond** ★

Schedules Policy Leads MOD More

After contact, you can select the Appt icon located at the task bar.

28%

← Lead Detail 16/3613

**CARONIA, TIFFANY**    

 (817) 729-4163  

 6528 Normandy Rd Apt 4, Fort Worth, Texas 76112

Current Time: CST (09:24 PM)

Call Text Appt. Comment Resolve Navigate

**Lead Information**

**VETERAN BURIAL AND WILL KIT REQUEST**

**YES! I WANT TO RECEIVE A VETERAN BURIAL AND WILL KIT**

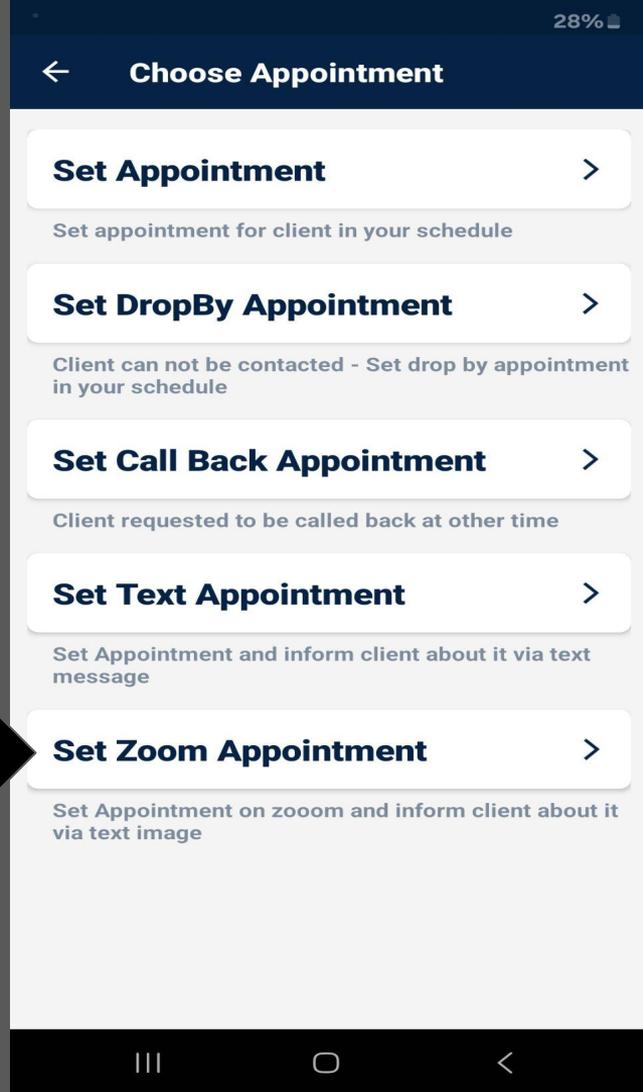
The No-Cost Burial and Will Kit for veterans helps you prepare your assets after you pass on. This includes helping you and your family with financial planning, healthcare planning, setting aside your assets, and so much more. By requesting a kit today, you can make sure you and your loved ones are taken care of.



Caronia, Tiffany	10/31/2024
<b>FIRST AND LAST NAME</b>	<b>LAST UPDATED</b>
6528 Normandy Rd Apt 4	Fort Worth Texas 76112
<b>ADDRESS</b>	<b>CITY STATE POSTAL CODE</b>
(817) 729-4163	
<b>PHONE #</b>	
Facebook Request	apple
<b>SOURCE</b>	<b>SECURITY KEYWORD</b>
tiffanycaronia@yahoo.com	
<b>EMAIL</b>	<b>BRANCH OF SERVICE</b>

**History**

Select “Set Zoom Appointment”



For training, if you are flipping a lead, you will select 'Now' and it will send them a link to join the existing Zoom.

If the prospect is not available until a later time select 'Later'



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← Virtual Zoom Appointment

Time Selection

Now  → Later

Email

Phone

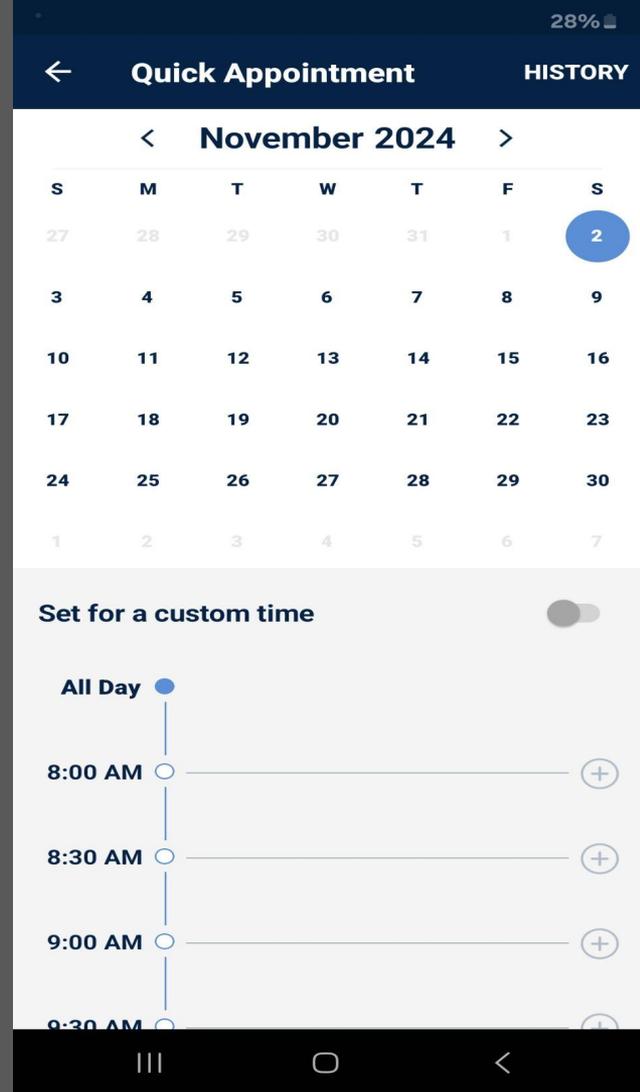
1. Creating appointment will immediately create a meeting in your Zoom account.
2. Emails will be sent to both you and the lead.
3. You are advised to conduct meeting from Laptop/PC and not the mobile device.
4. Lead can join the meeting from any device.

Personal Meeting Room ID (PMR ID)

Done

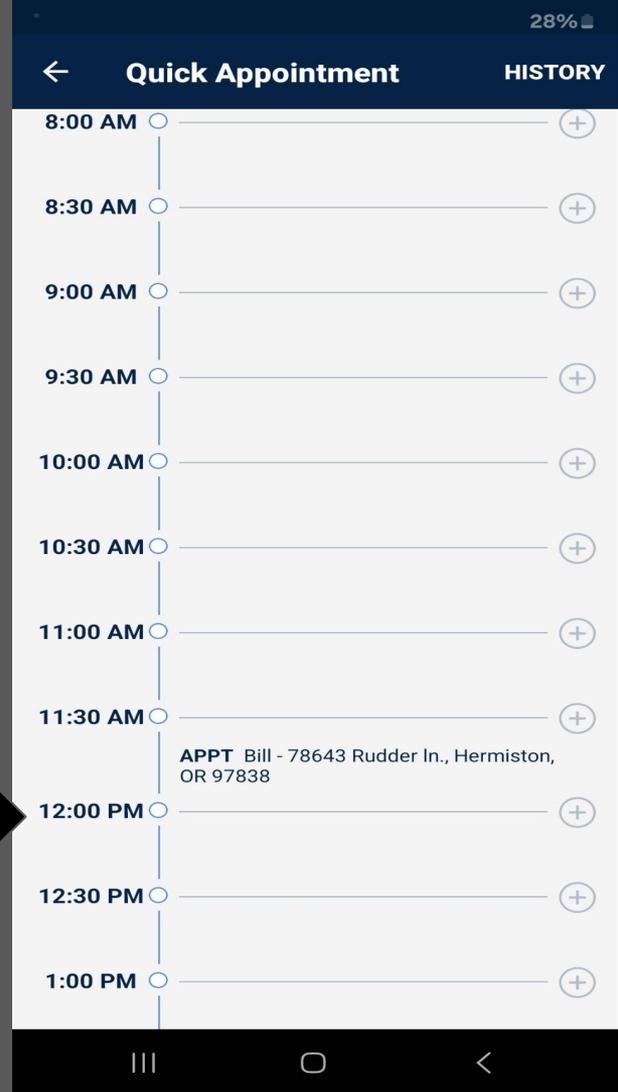
**If you selected 'Later' you will be brought to the quick appointment page. From here you will select a date to hold the appointment.**

**(Best practice: Do not book farther than 2 days ahead)**



Once you have selected the date, simply scroll down and find the time slot and click on it.

(The time slots are set in 30 min increments, but always let the prospect know that it will be within that 30 min window as presentations do sometimes roll into the next slot)



**Verify date and time are correct, then select Create.**

28%

← Quick Appointment HISTORY

8:00 AM ○ +

8:30 AM ○ +

9:00 AM ○ +

9:30 AM ○ +

10:00 AM ○ +

10:30 AM ○ +

**Are you sure you want to create an appointment on Nov-02-2024 12:00 pm?**

Change Time zone:

User Lead Office Device

Note: By selecting User timezone you will receive the push notification according to chosen timezone setting.

**CREATE**

**If you have any questions regarding how to set appointments or for any other inquiries, make sure to contact your Upline so they can assist you**

**AO Lets Grow!!**