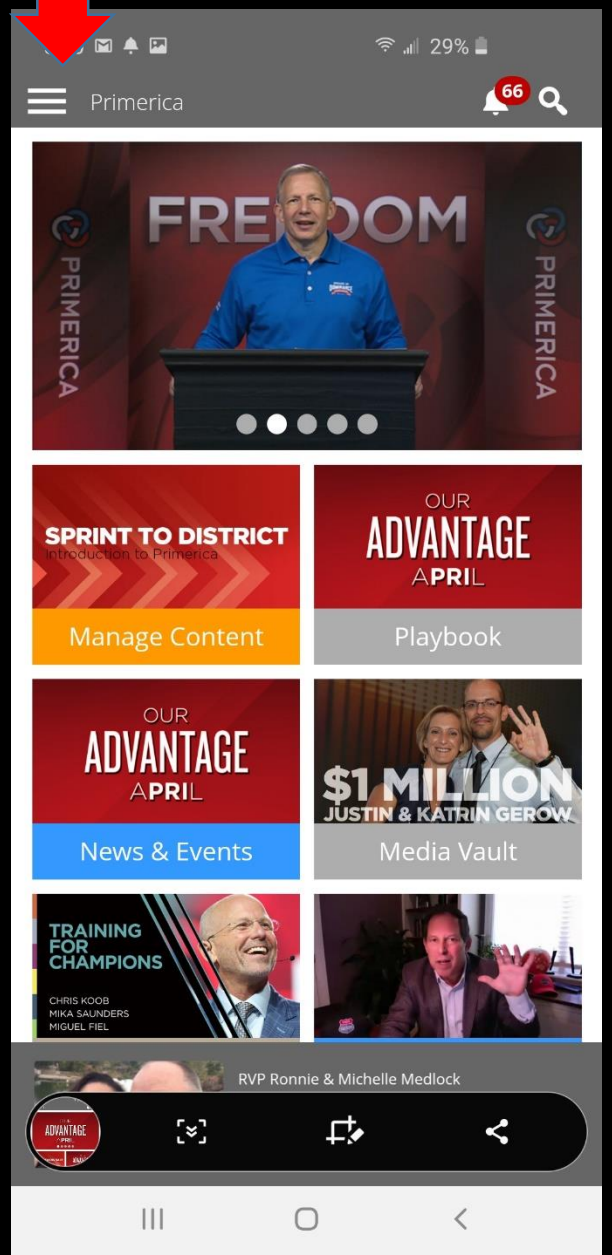
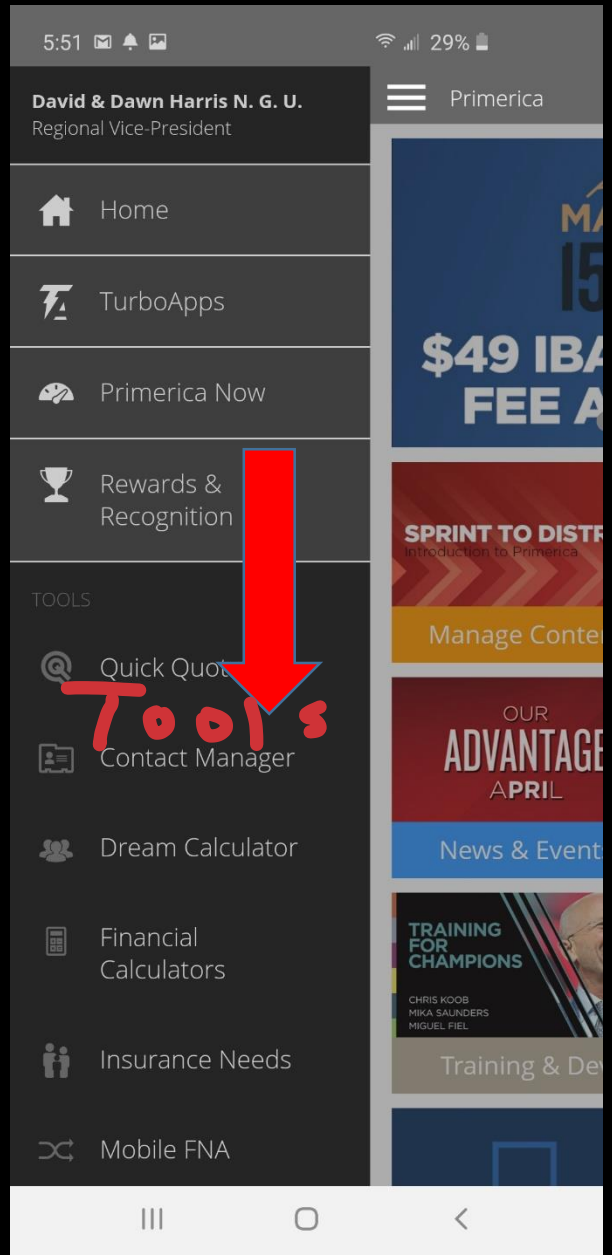
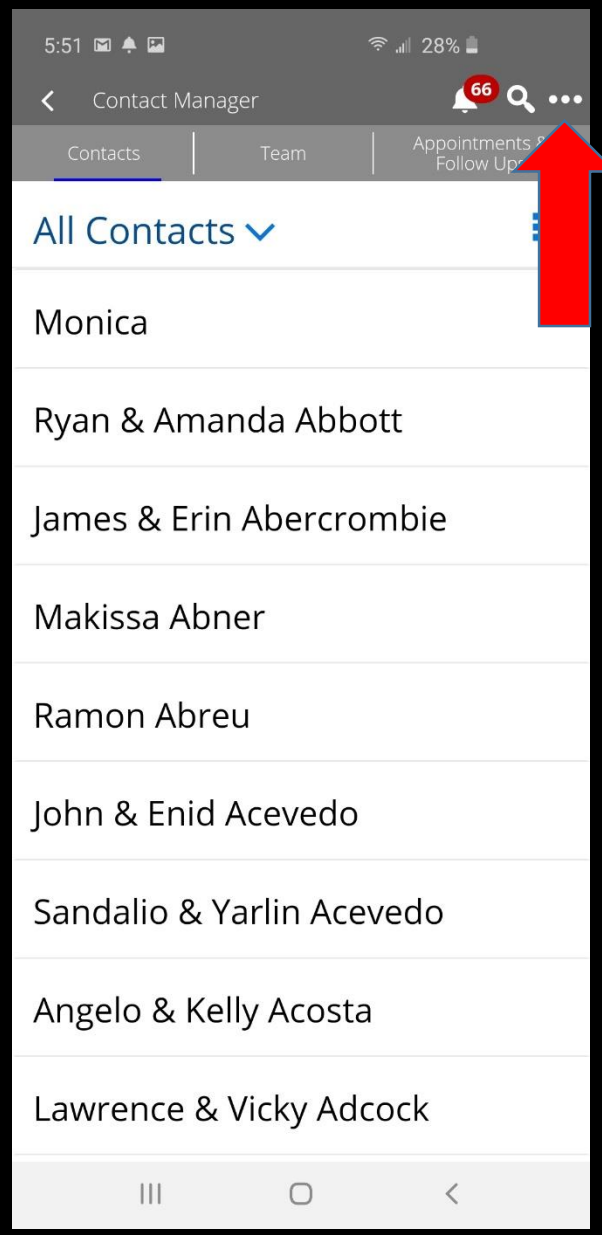
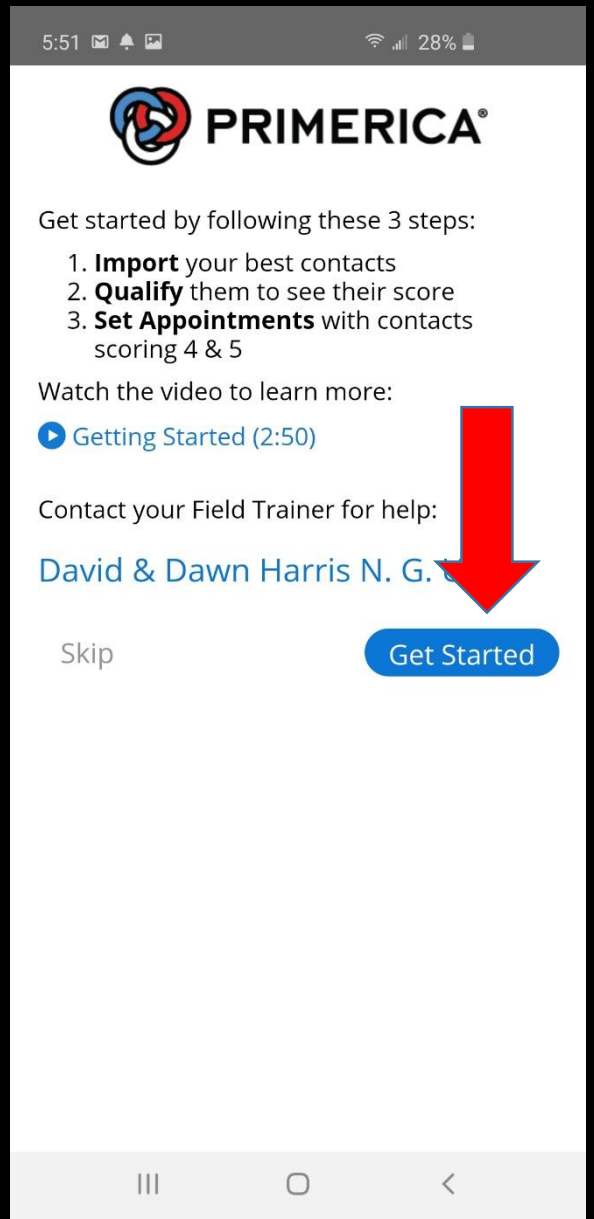
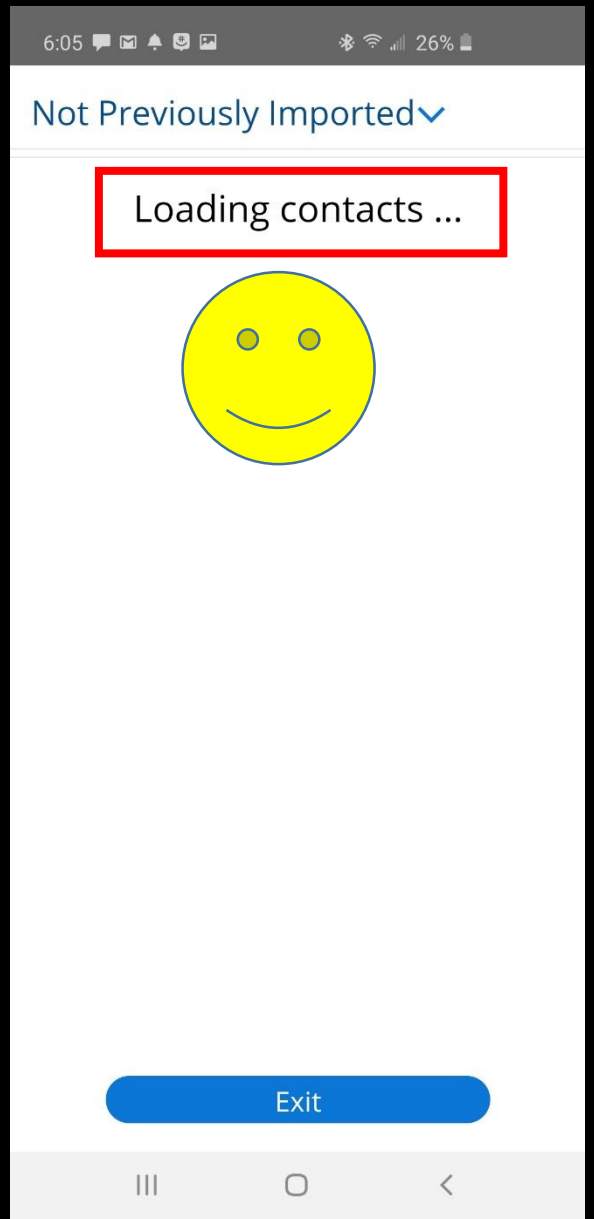
Steps to Import & Qualify Contacts

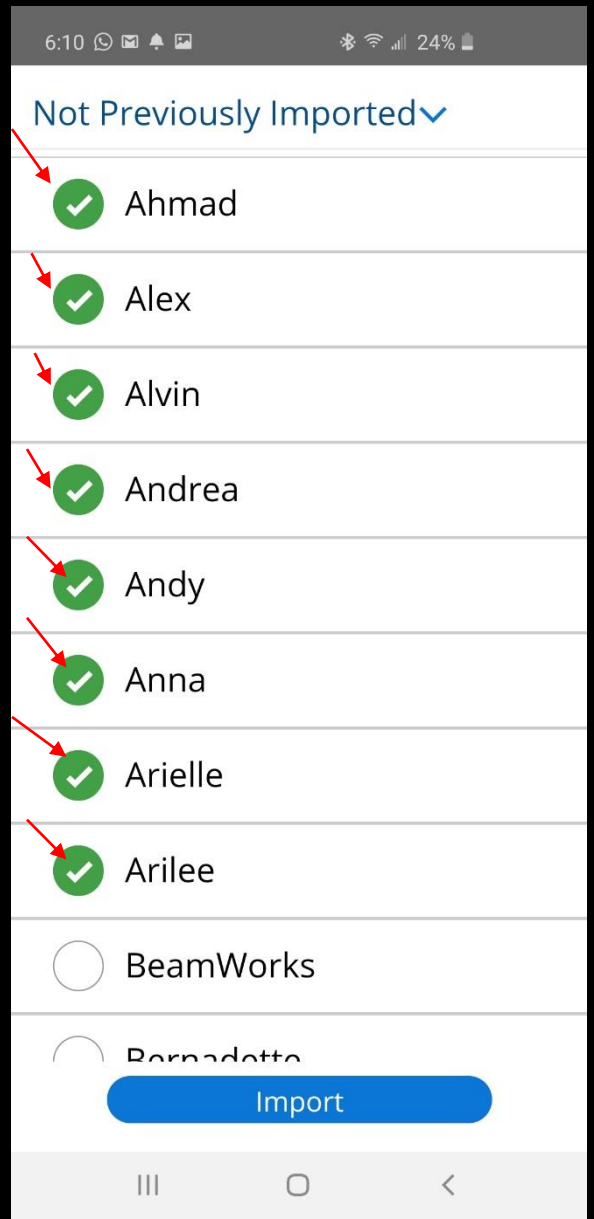


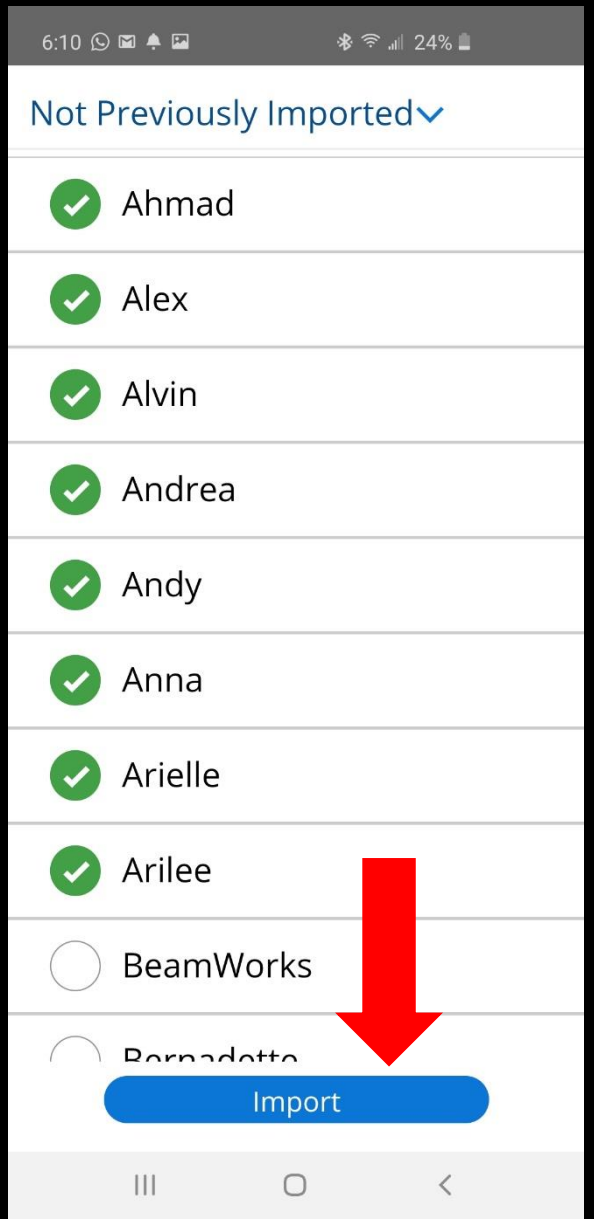


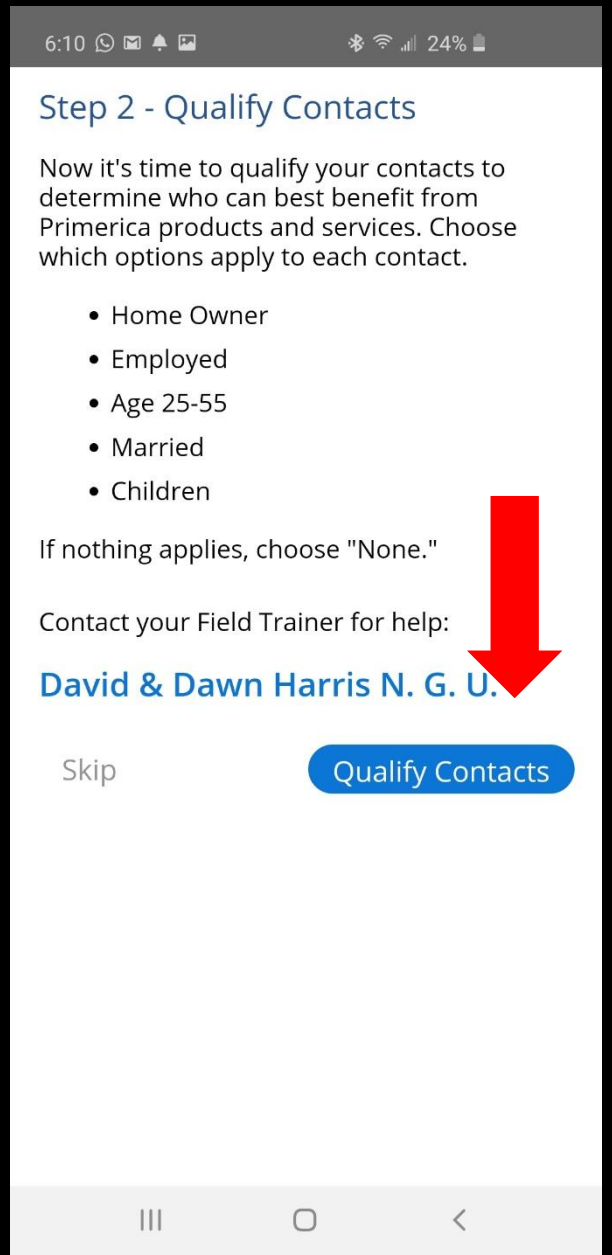


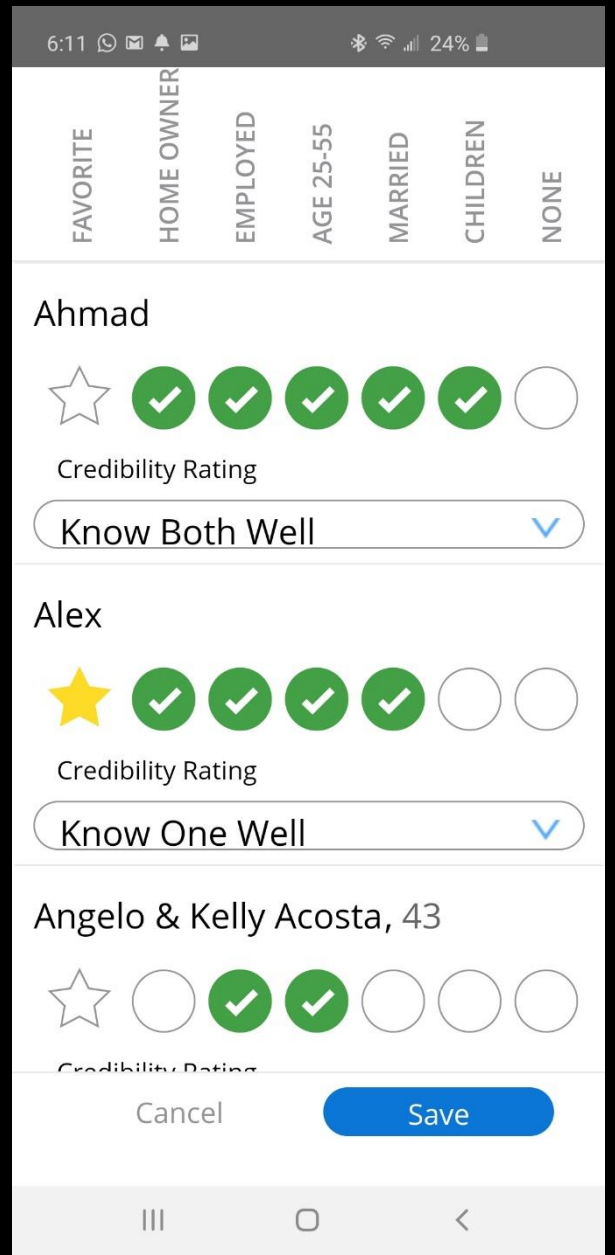

5:51
28%
PRIMERICA
Get started by following these 3 steps:
1. **Import** your best contacts
2. **Qualify** them to see their score
3. **Set Appointments** with contacts scoring 4 & 5
Watch the video to learn more:
Getting Started (2:50)
Contact your Field Trainer for help:
David & Dawn Harris N. G.
Skip
Get Started

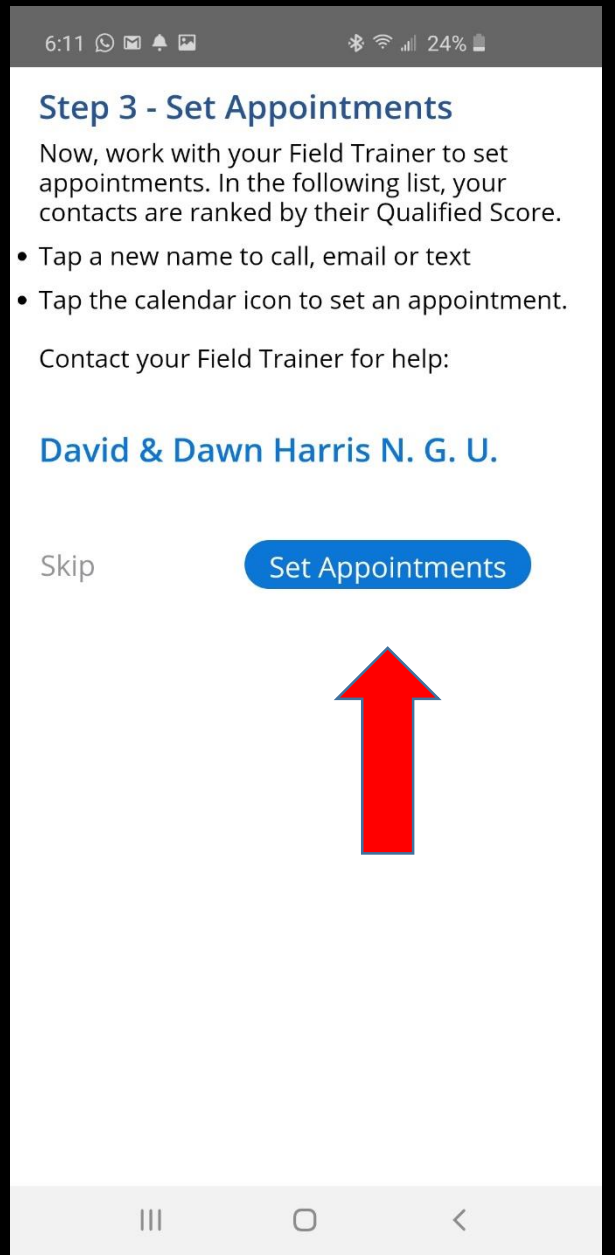

6:05
26%
Not Previously Imported
Loading contacts ...
Exit

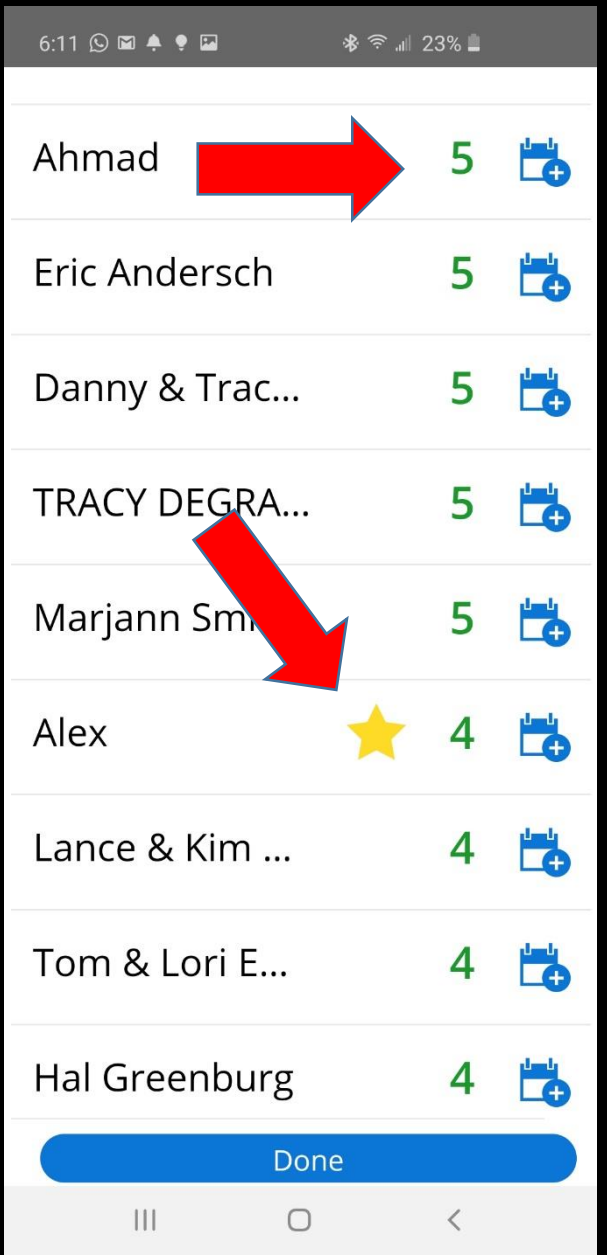

6:10
24%
Not Previously Imported
Ahmad
Alex
Alvin
Andrea
Andy
Anna
Arielle
Arilee
BeamWorks
Import

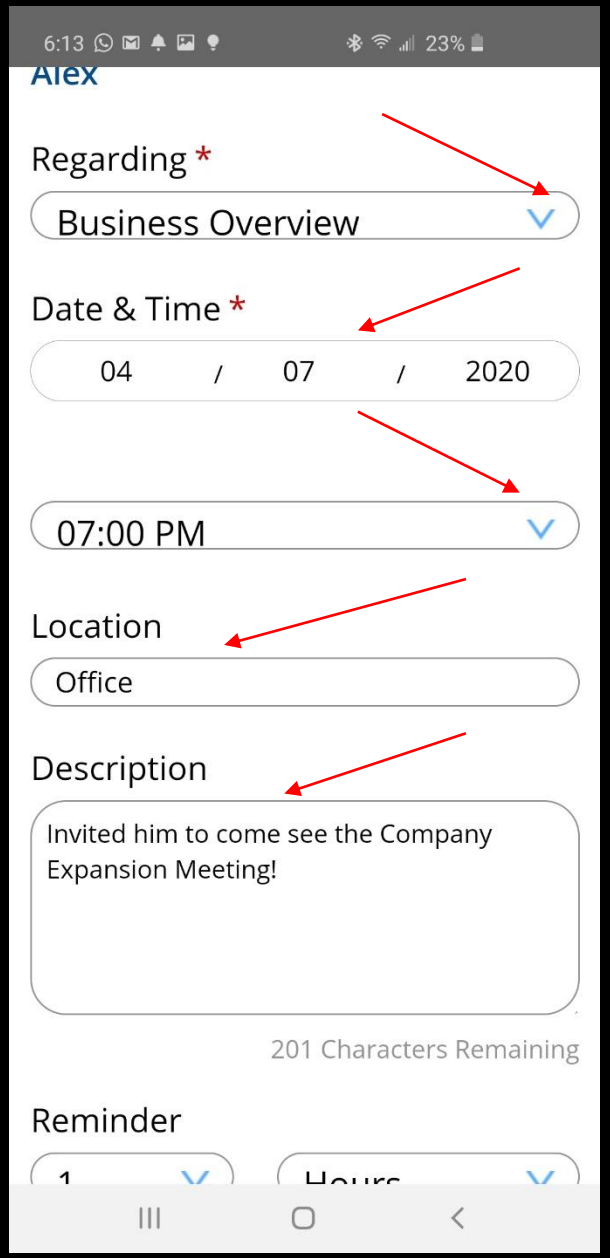

6:10
24%
Not Previously Imported
Ahmad
Alex
Alvin
Andrea
Andy
Anna
Arielle
Arilee
BeamWorks
Import

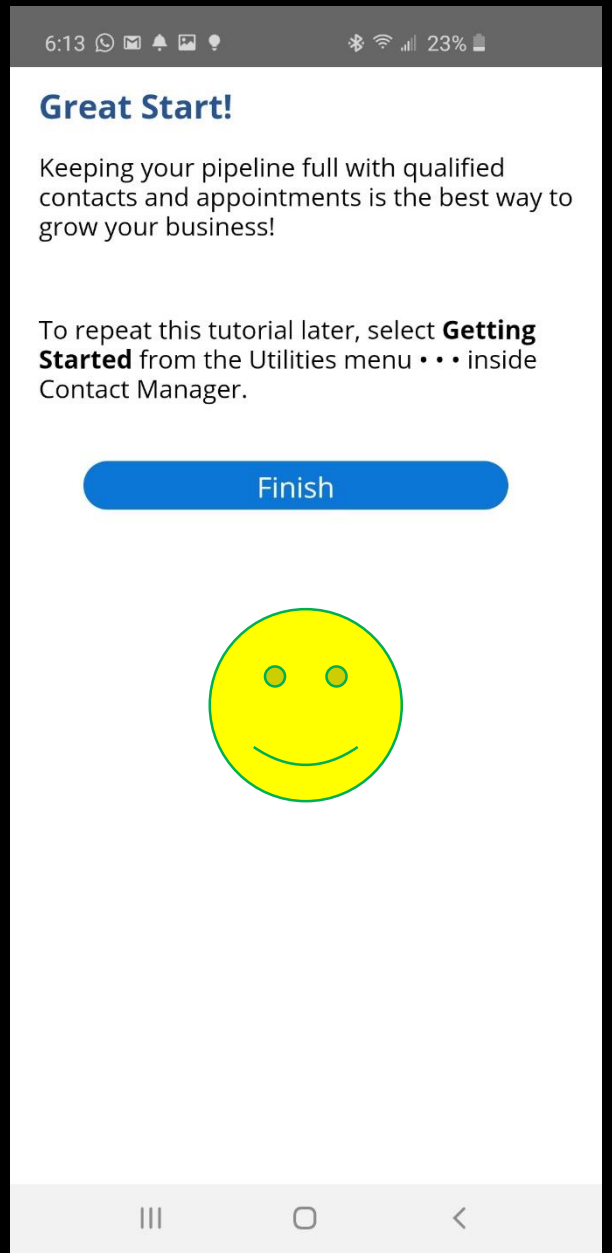

6:10
24%
Step 2 - Qualify Contacts
Now it's time to qualify your contacts to determine who can best benefit from Primerica products and services. Choose which options apply to each contact.
Home Owner
Employed
Age 25-55
Married
Children
If nothing applies, choose "None."
Contact your Field Trainer for help:
David & Dawn Harris N. G. U.
Skip
Qualify Contacts


6:11
24%
FAVORITE
HOME OWNER
EMPLOYED
AGE 25-55
MARRIED
CHILDREN
NONE
Ahmad
Credibility Rating
Know Both Well
Alex
Credibility Rating
Know One Well
Angelo & Kelly Acosta, 43
Cancel
Save


6:11
24%
Step 3 - Set Appointments
Now, work with your Field Trainer to set appointments. In the following list, your contacts are ranked by their Qualified Score.
Tap a new name to call, email or text
Tap the calendar icon to set an appointment.
Contact your Field Trainer for help:
David & Dawn Harris N. G. U.
Skip
Set Appointments


6:11
23%
Ahmad 5
Eric Andersch 5
Danny & Trac... 5
TRACY DEGRA... 5
Marjann Smi 5
Alex 4
Lance & Kim ... 4
Tom & Lori E... 4
Hal Greenburg 4
Done


6:13
23%
Alex
Regarding *
Business Overview
Date & Time *
04 / 07 / 2020
07:00 PM
Location
Office
Description
Invited him to come see the Company Expansion Meeting!
201 Characters Remaining
Reminder


6:13
23%
Great Start!
Keeping your pipeline full with qualified contacts and appointments is the best way to grow your business!
To repeat this tutorial later, select **Getting Started** from the Utilities menu • • • inside Contact Manager.
Finish