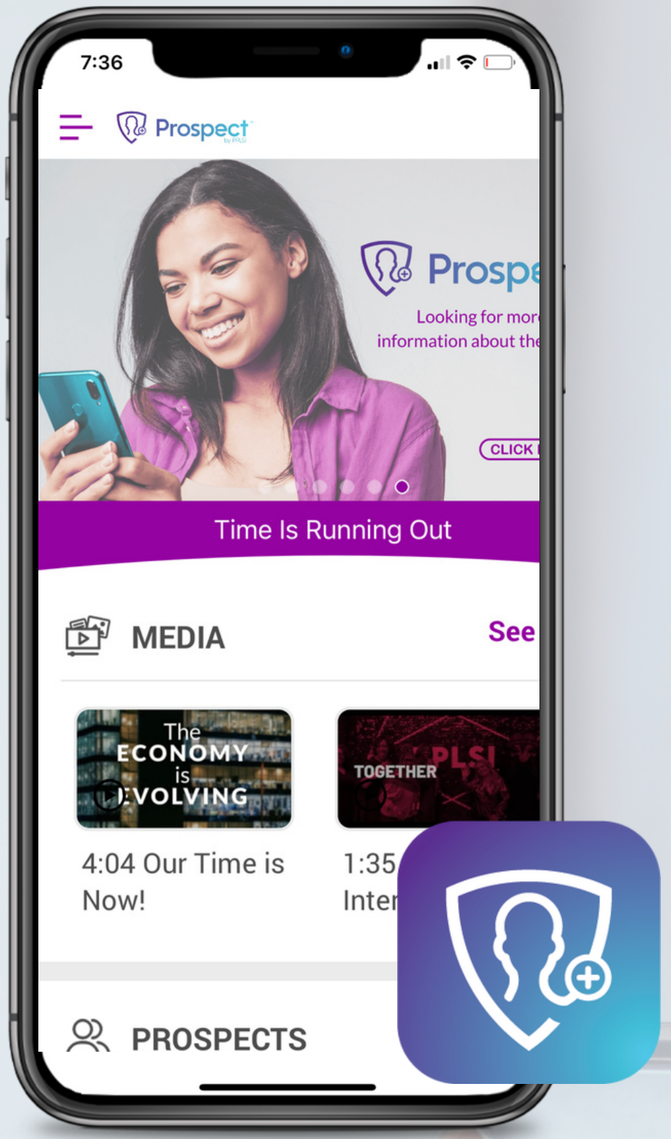

Prospect™ by PPLSI

Associate Guide

PPLSI
LegalShield/IDShield

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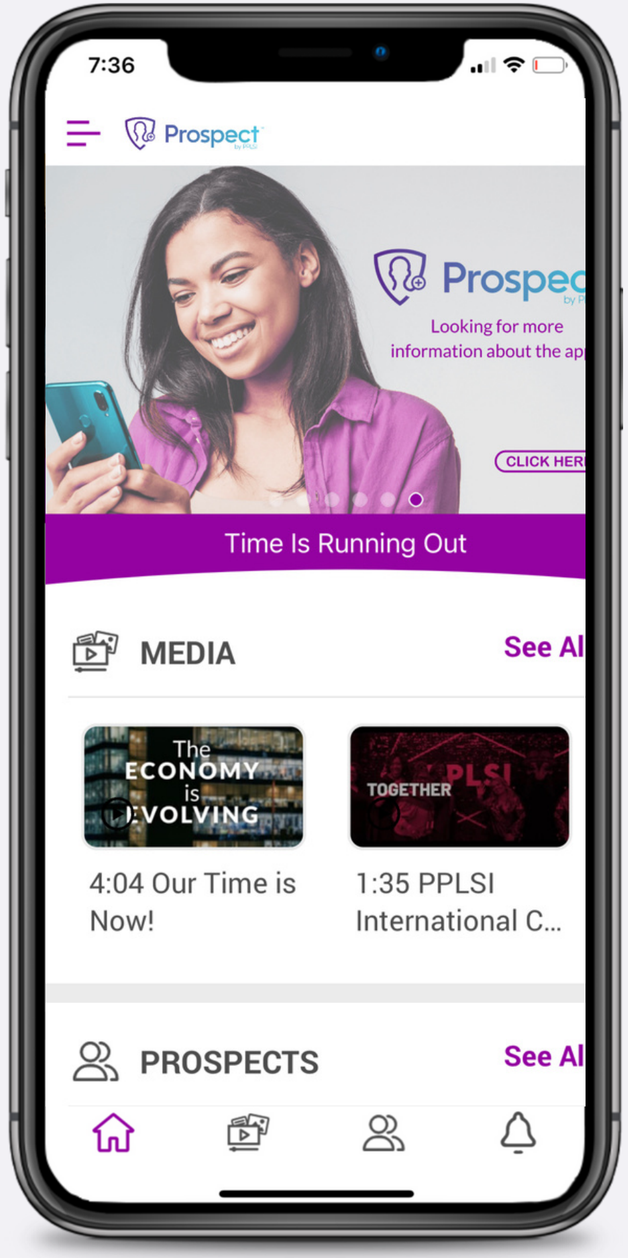

2

HOMESCREEN

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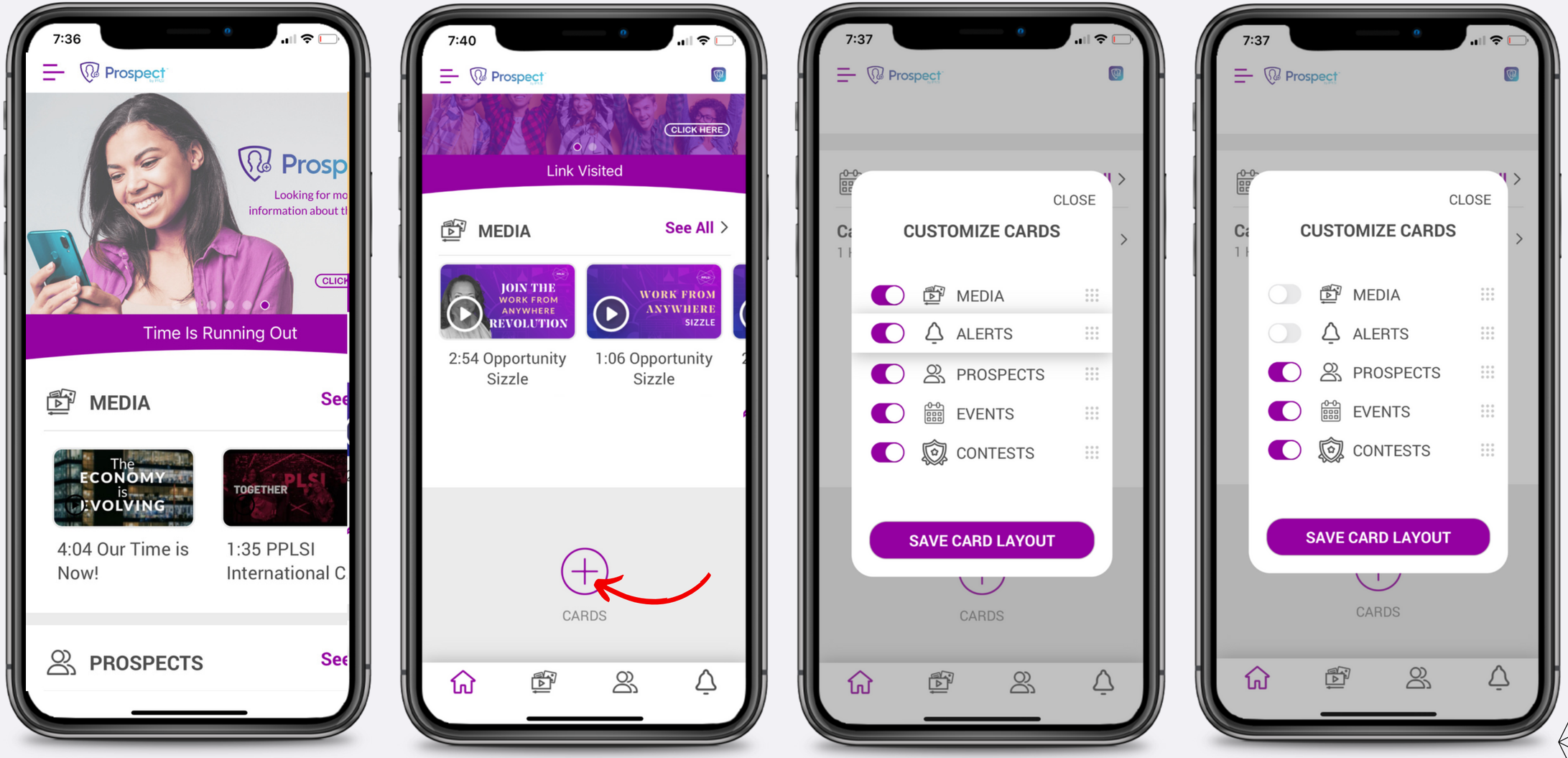
How to Customize Your Home Screen



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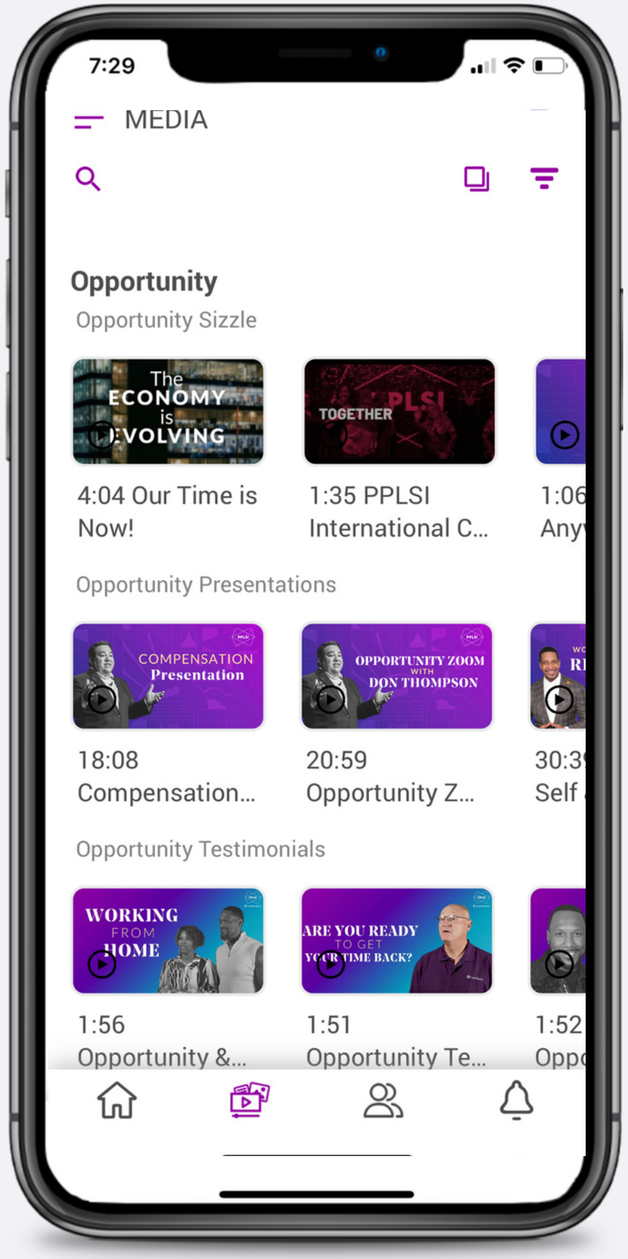
LegalShield/IDShield



MEDIA RESOURCES

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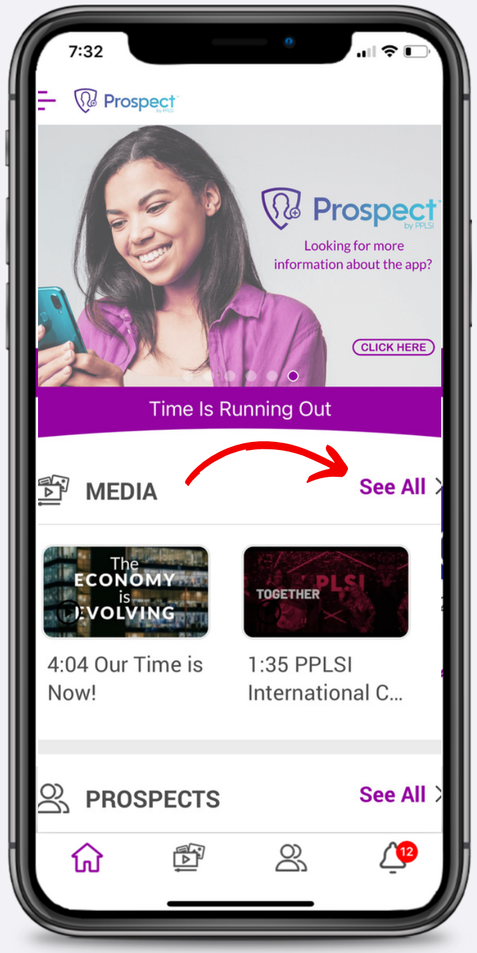

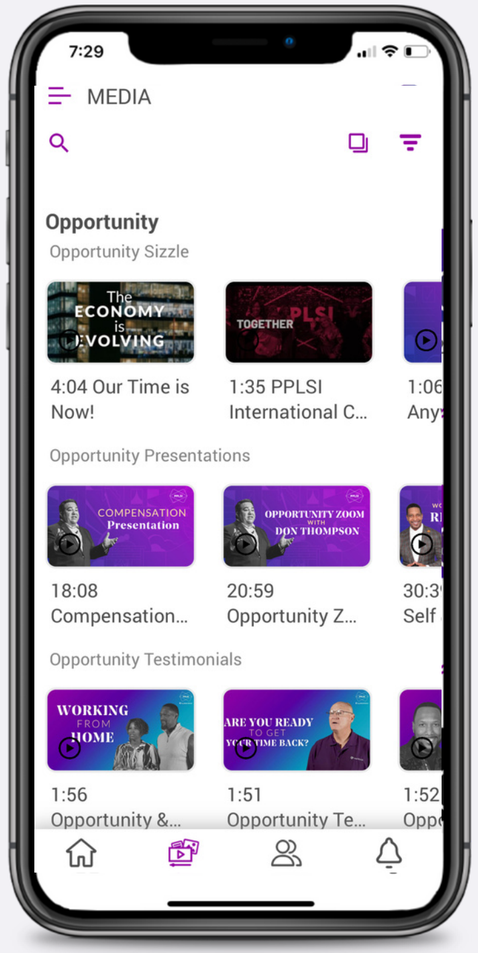

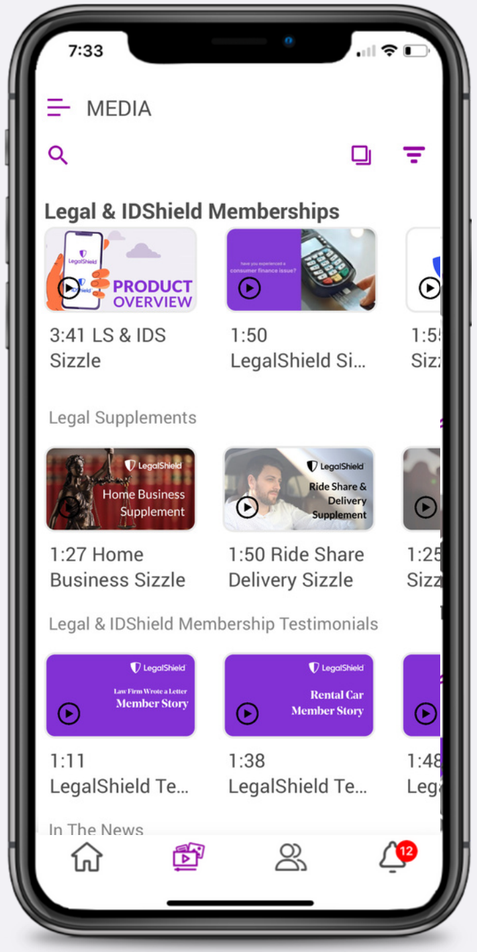

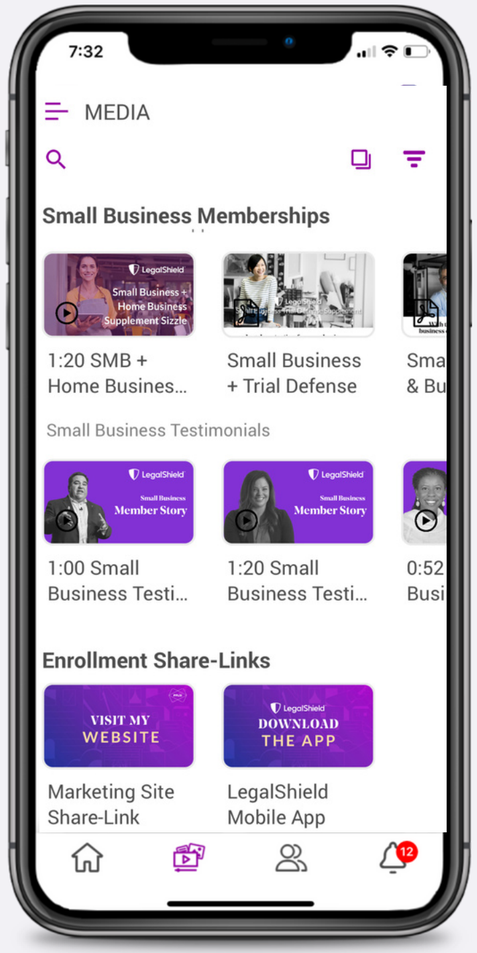

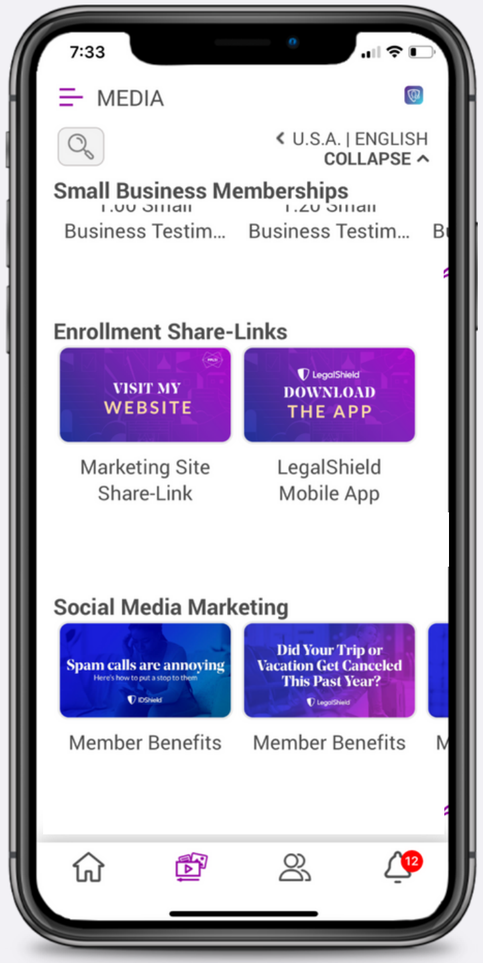

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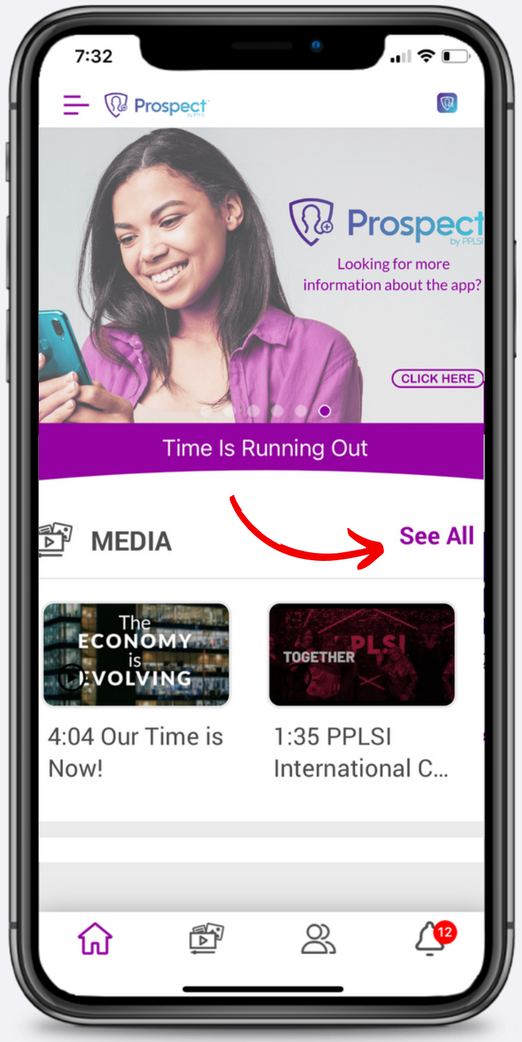
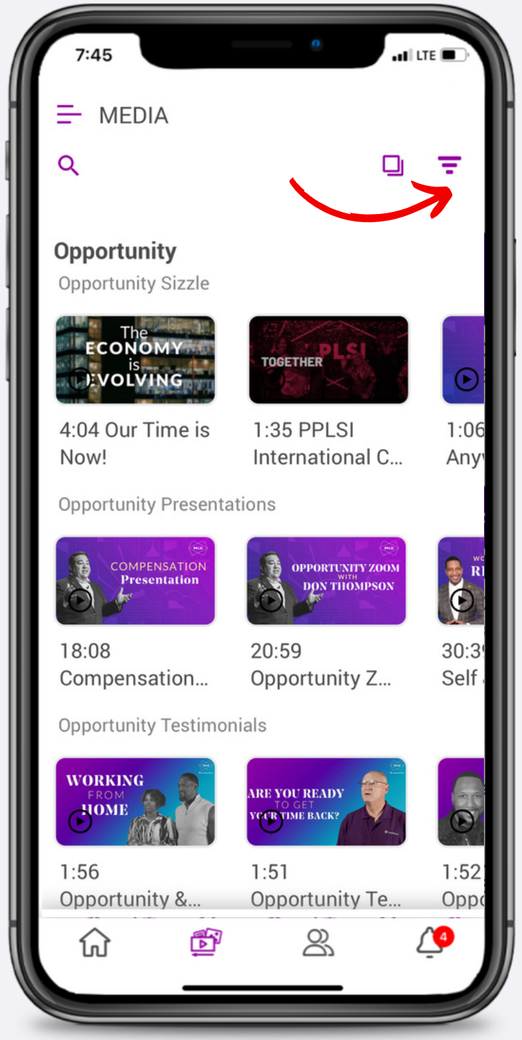
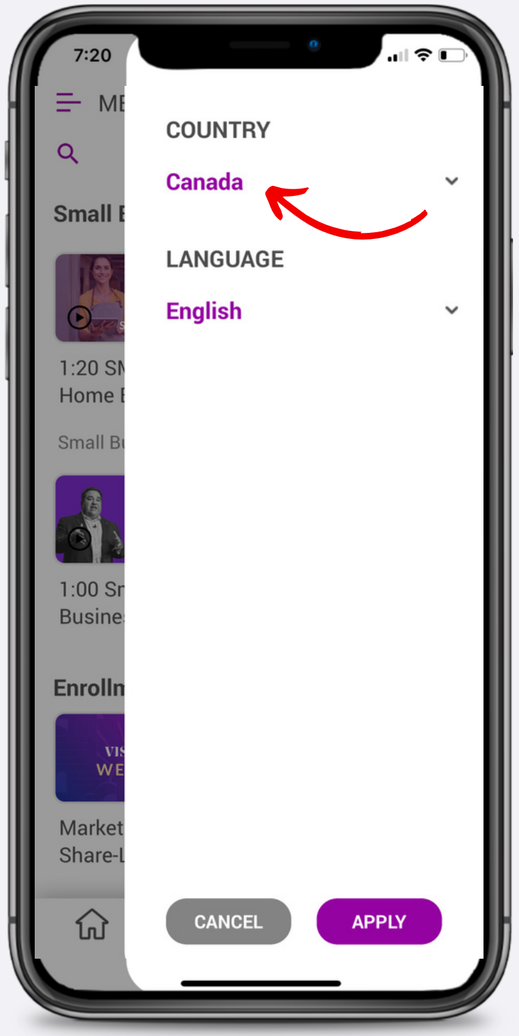
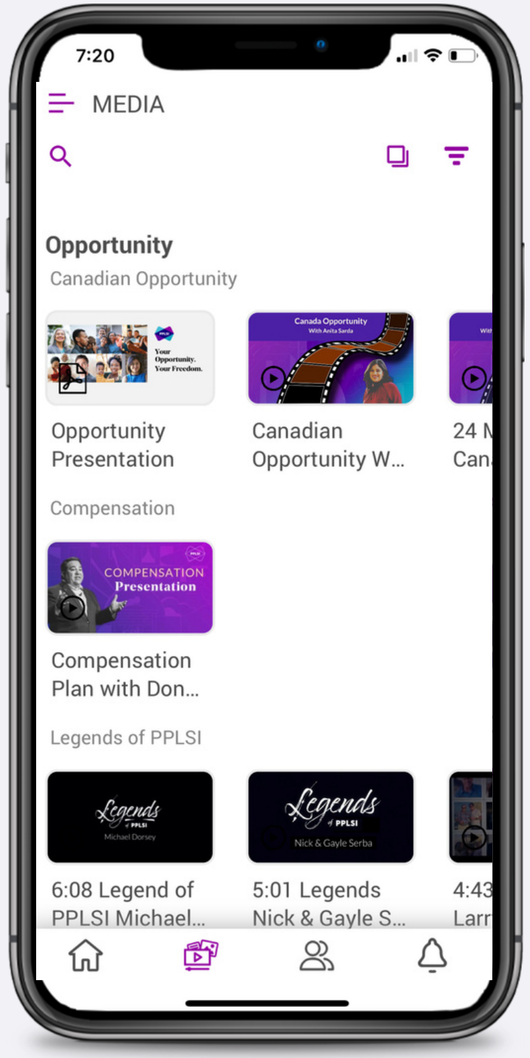
LegalShield/IDShield

How to Access Resources for LegalShield CANADA









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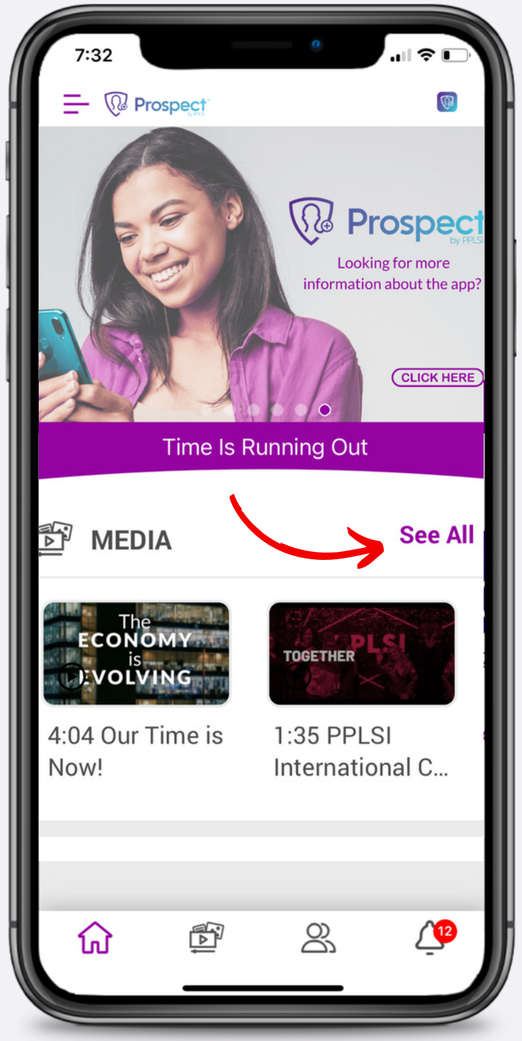
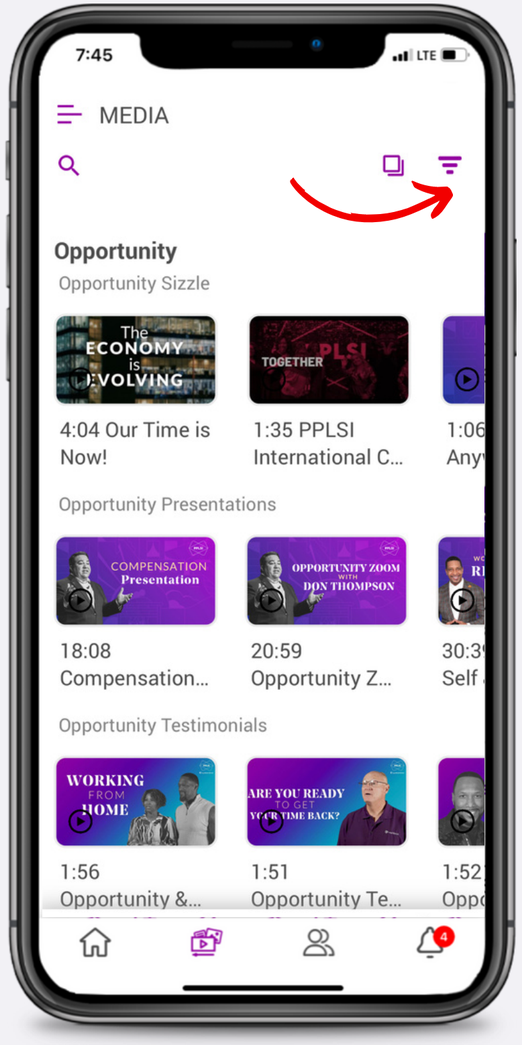
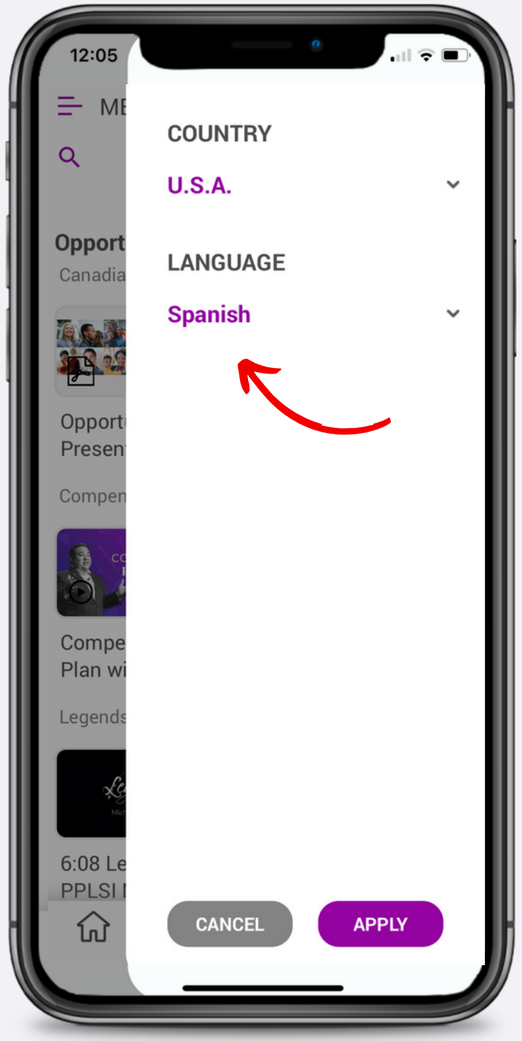
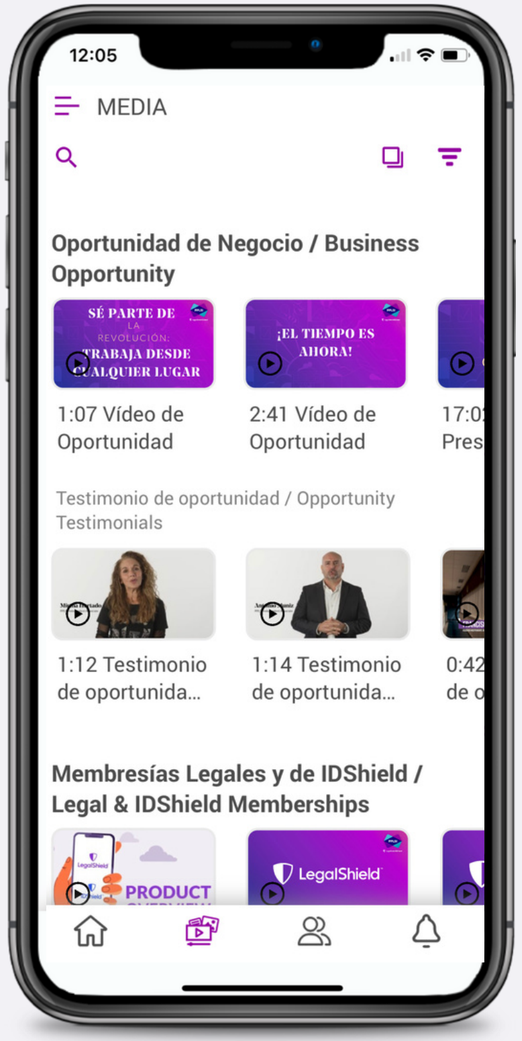
LegalShield/IDShield

How to Access Resources for LegalShield en ESPAÑOL









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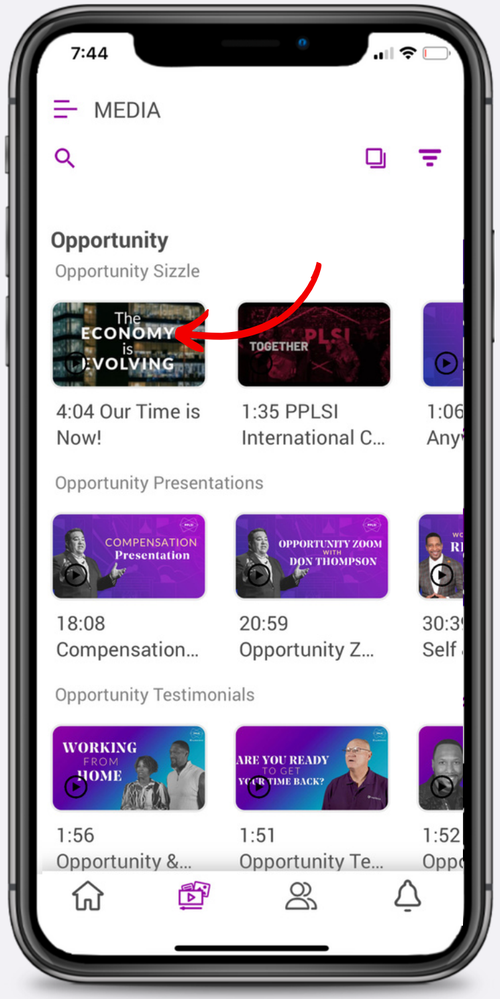
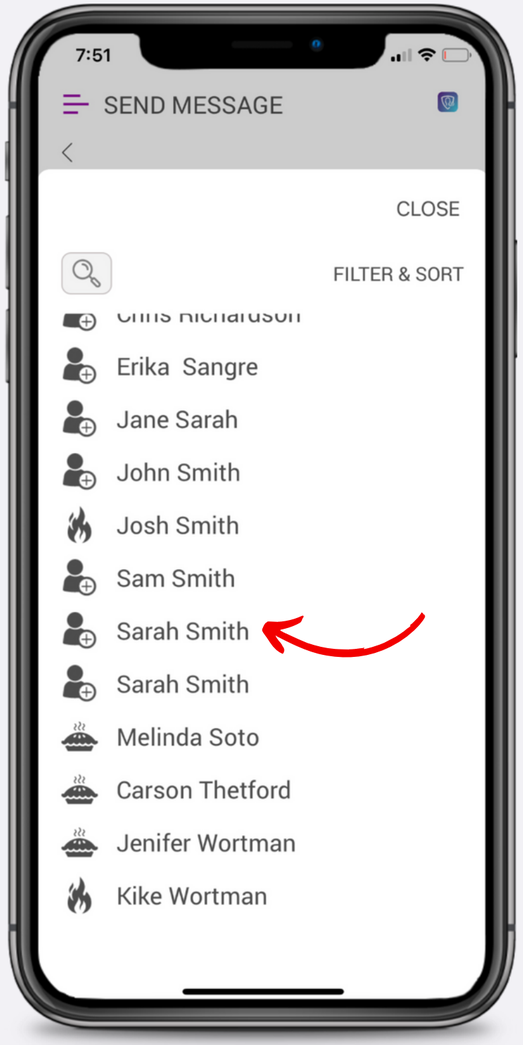
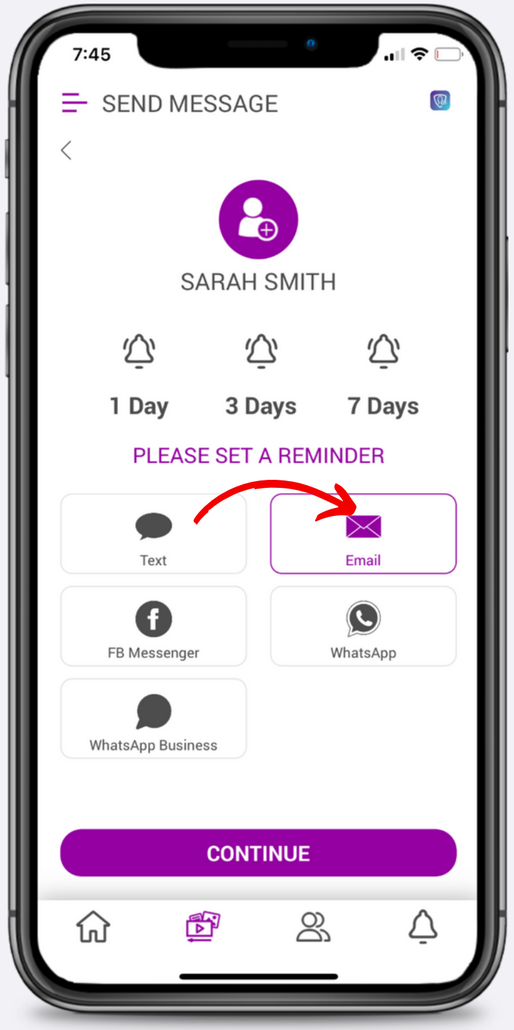
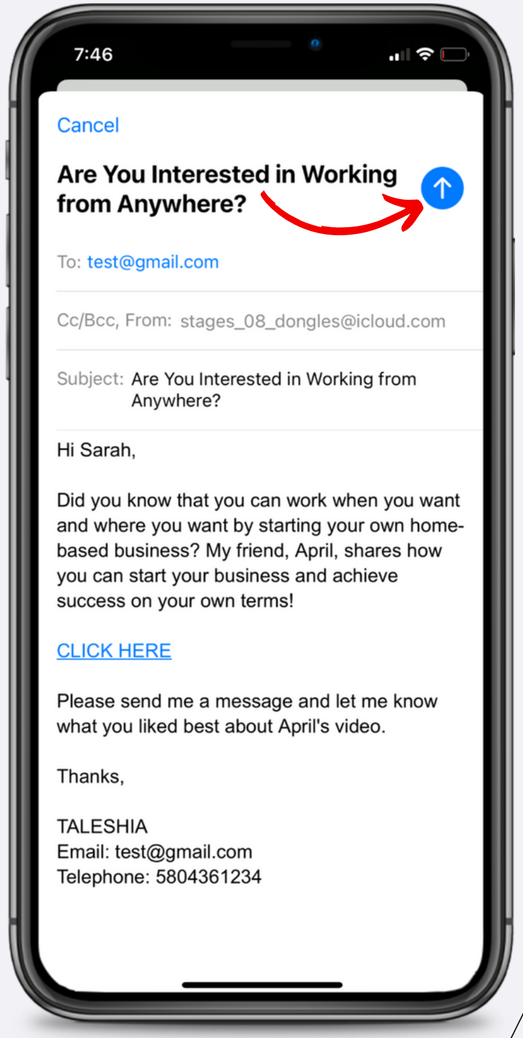
How to Add Share a Resource from Media Resources









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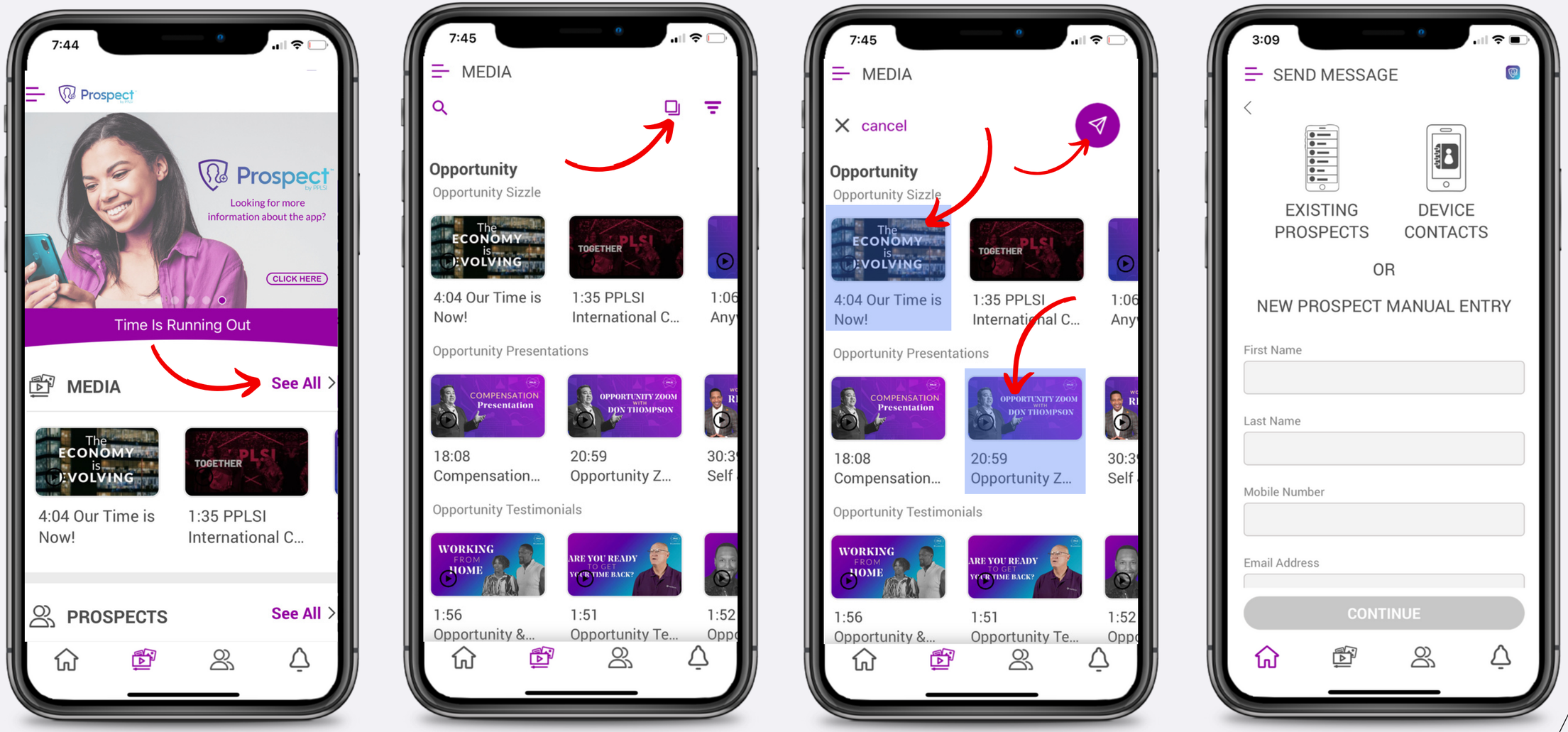
How to Share Multiple Resources



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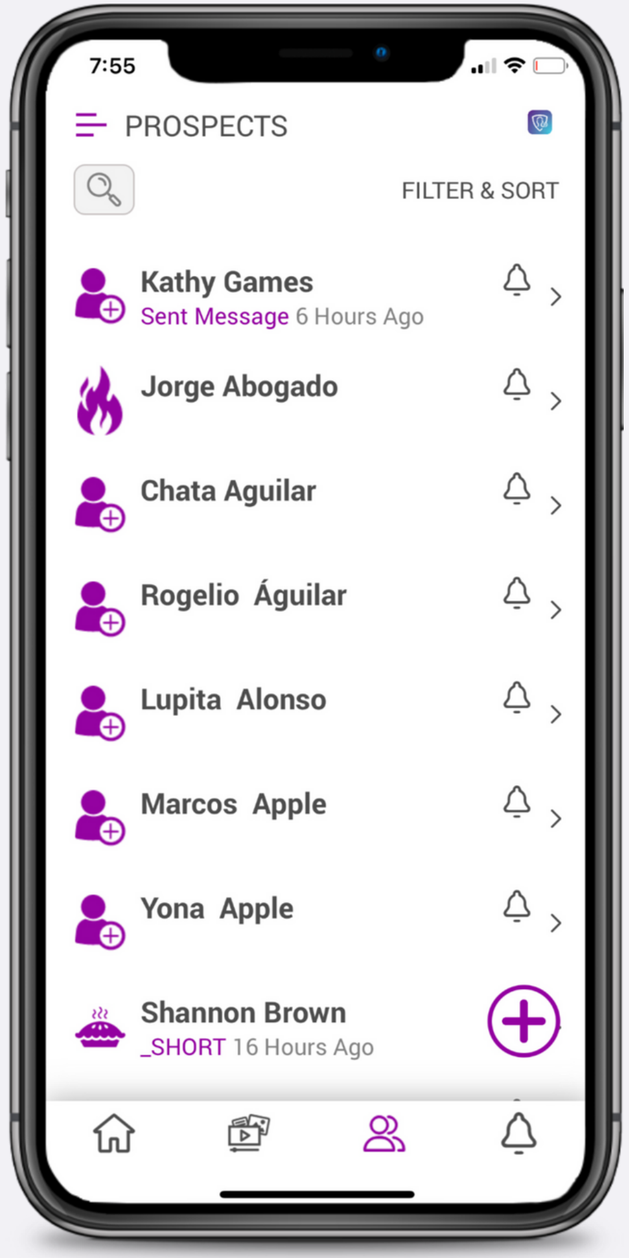
LegalShield/IDShield



CONTACTS

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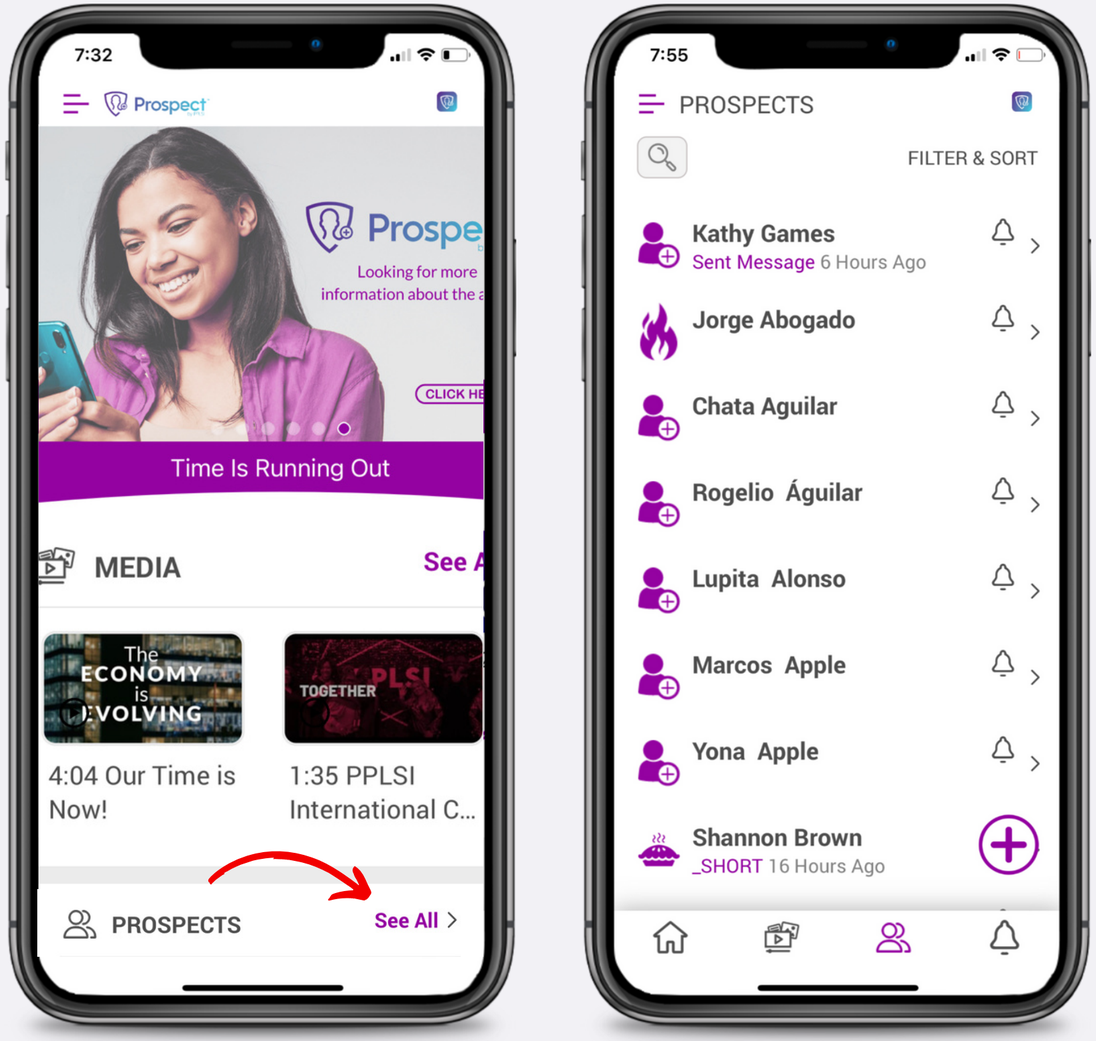
How to Access Contacts



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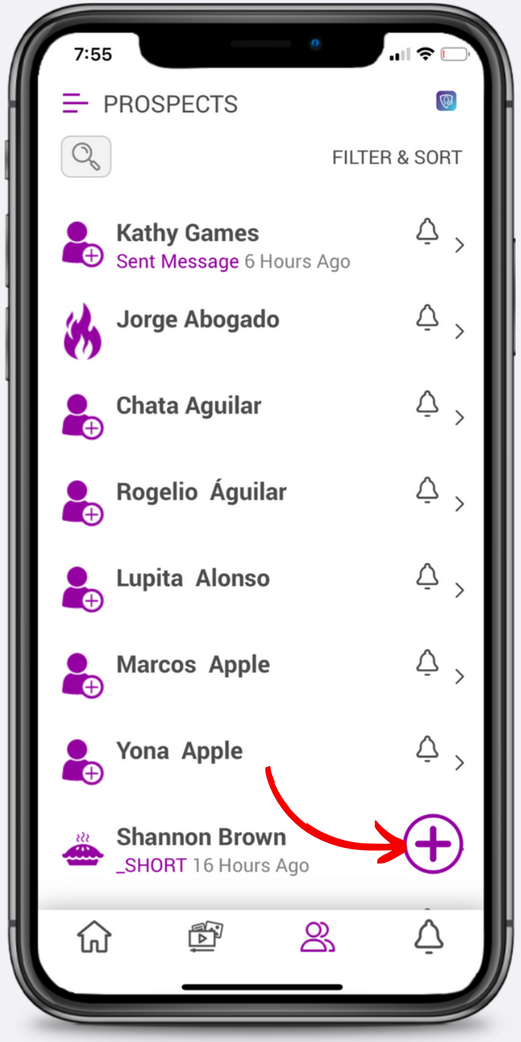
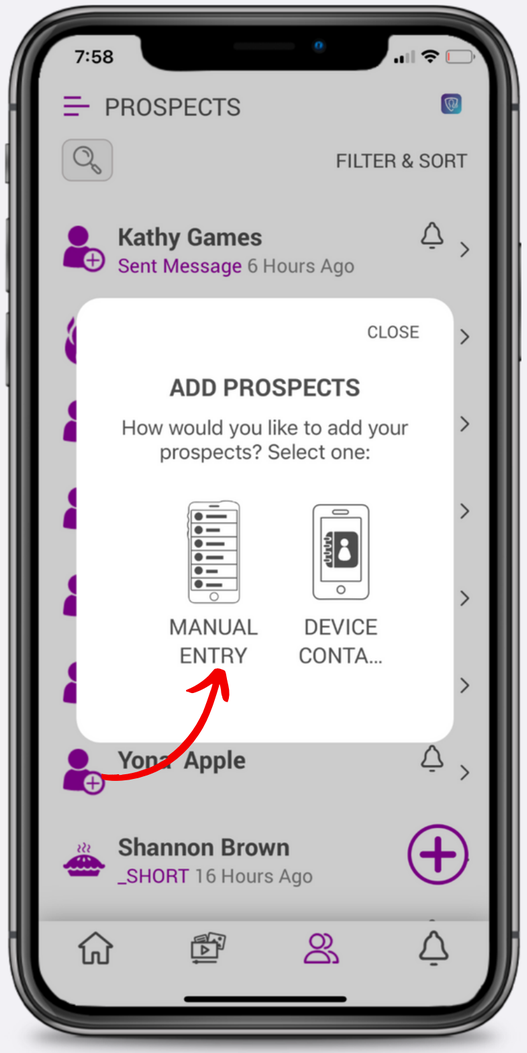
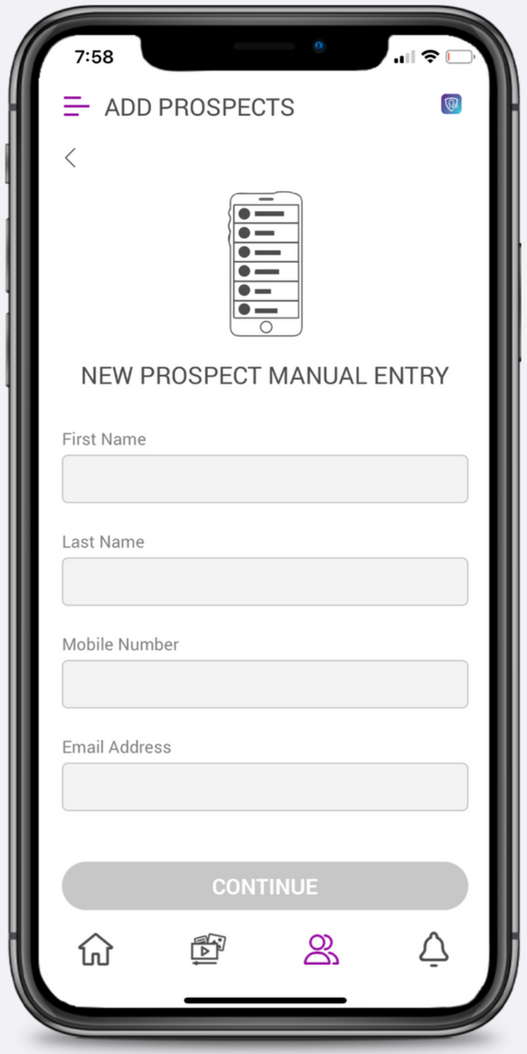
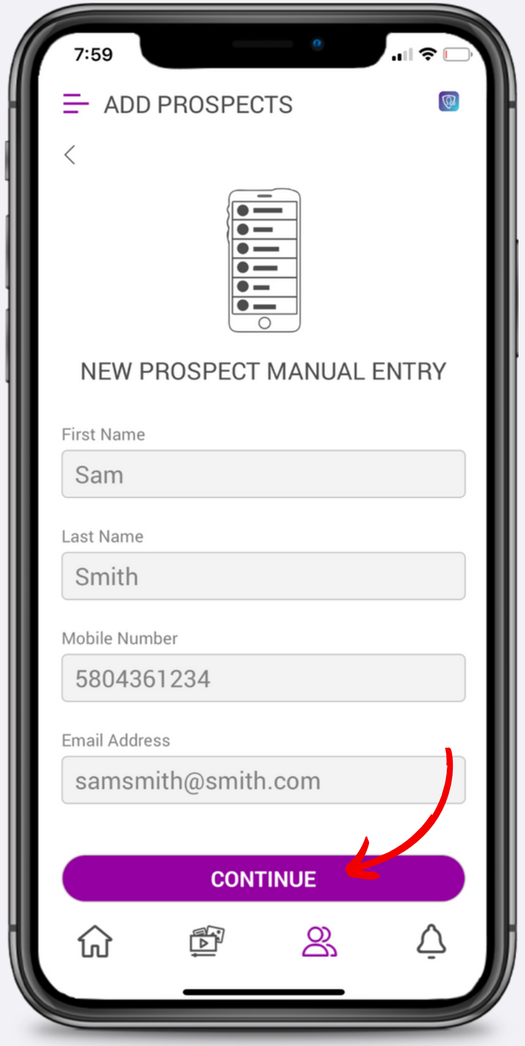
How to Add a Contact Manually









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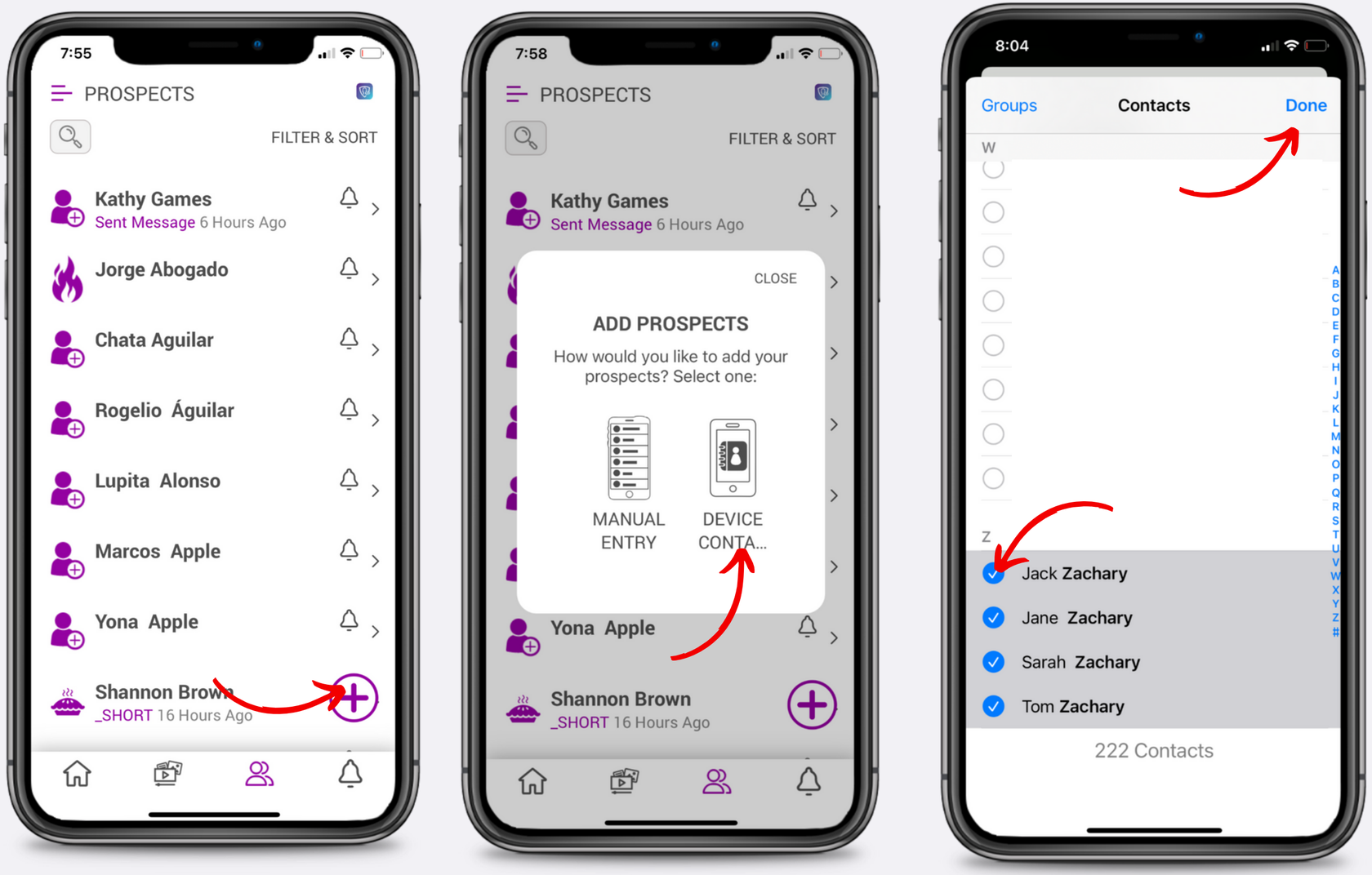
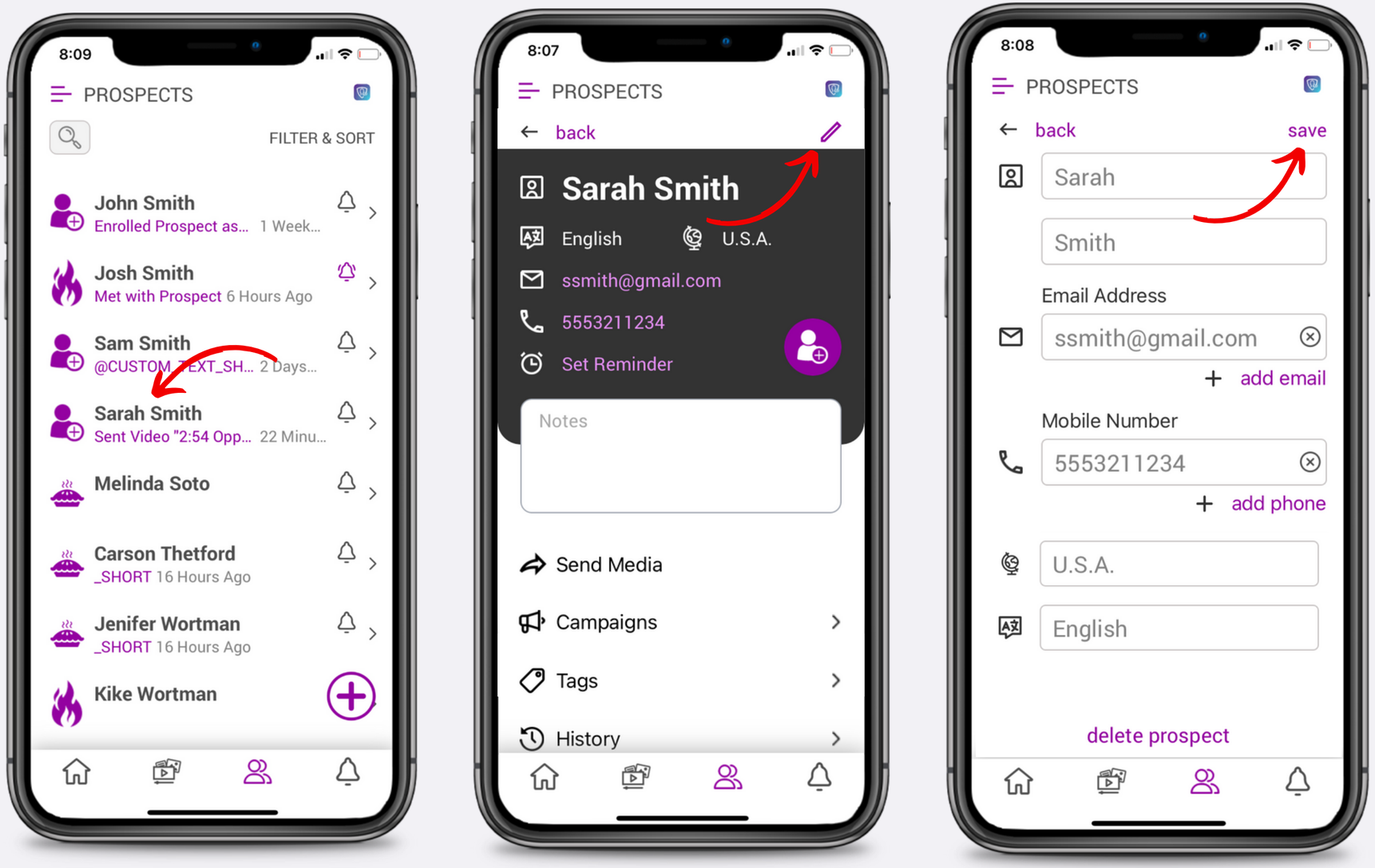
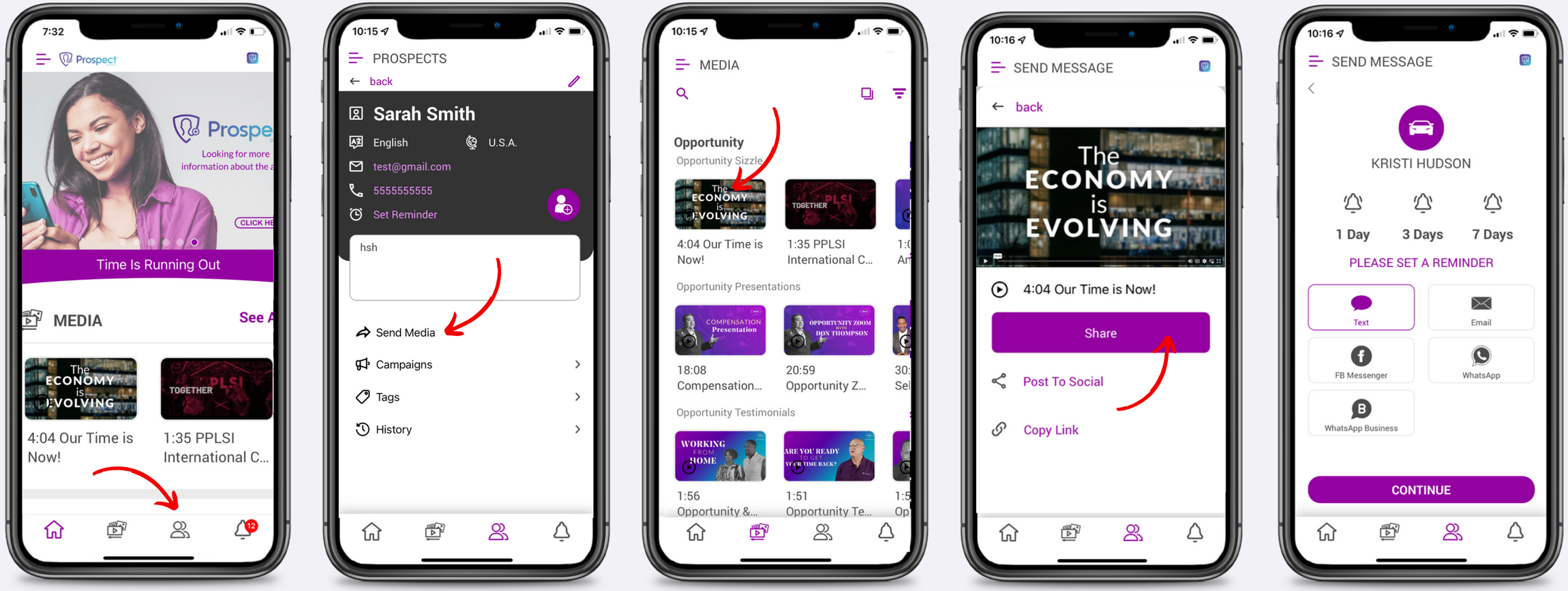
How to Import Contacts from Your Device



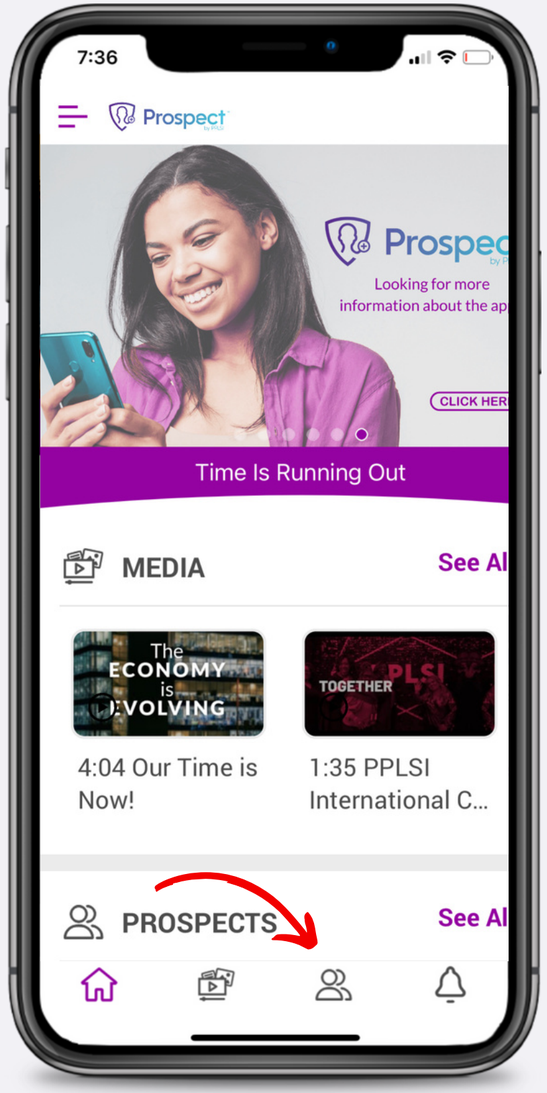
How to Edit Contact Details

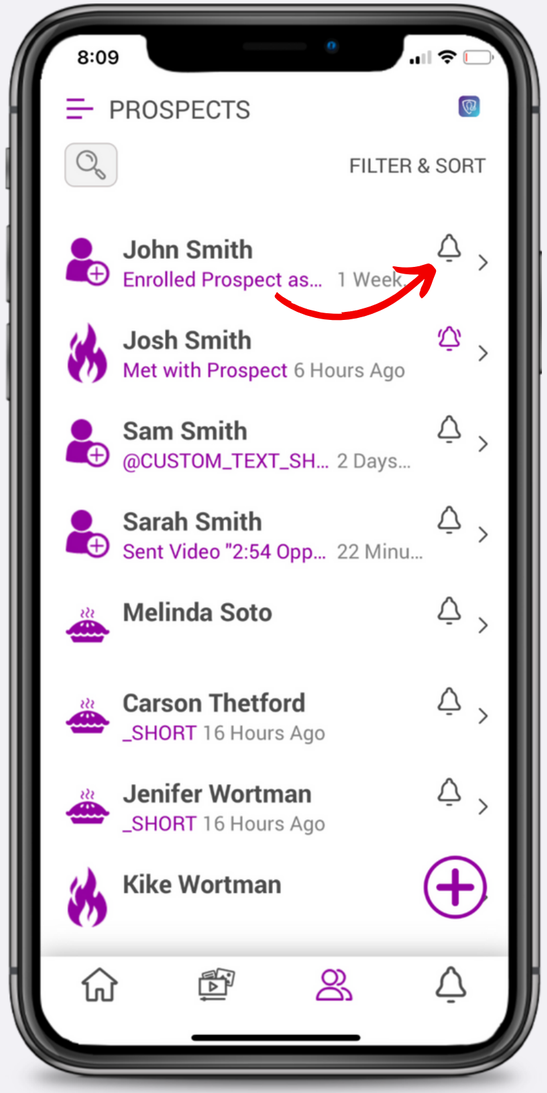


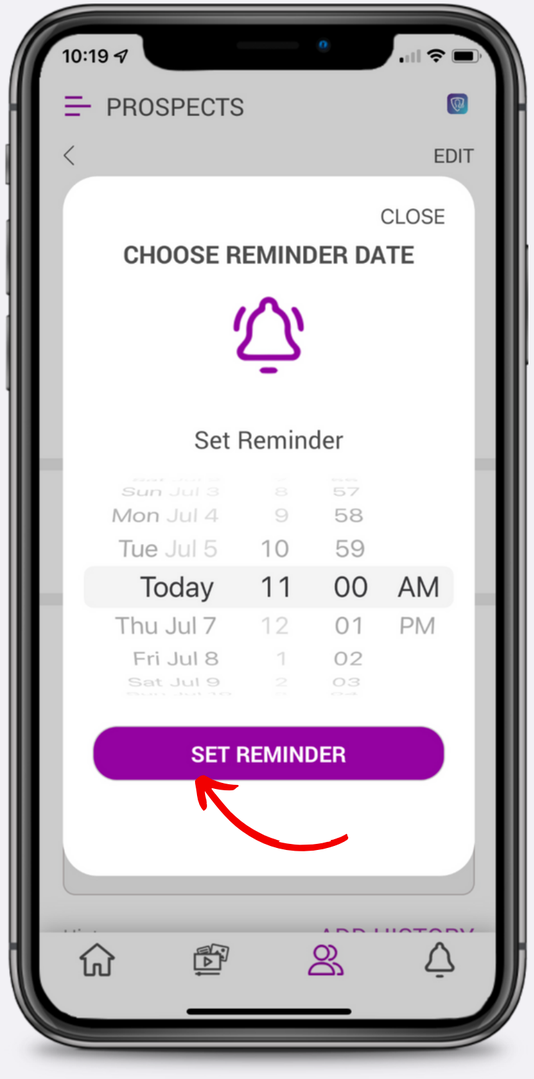
How to Share a Resource to a Contact



How to Set a Reminder







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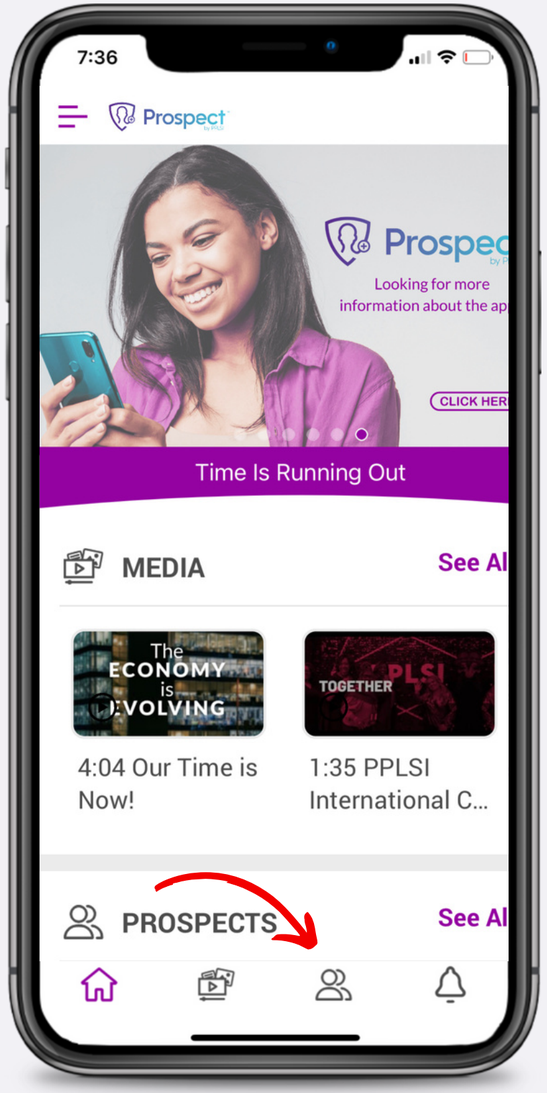
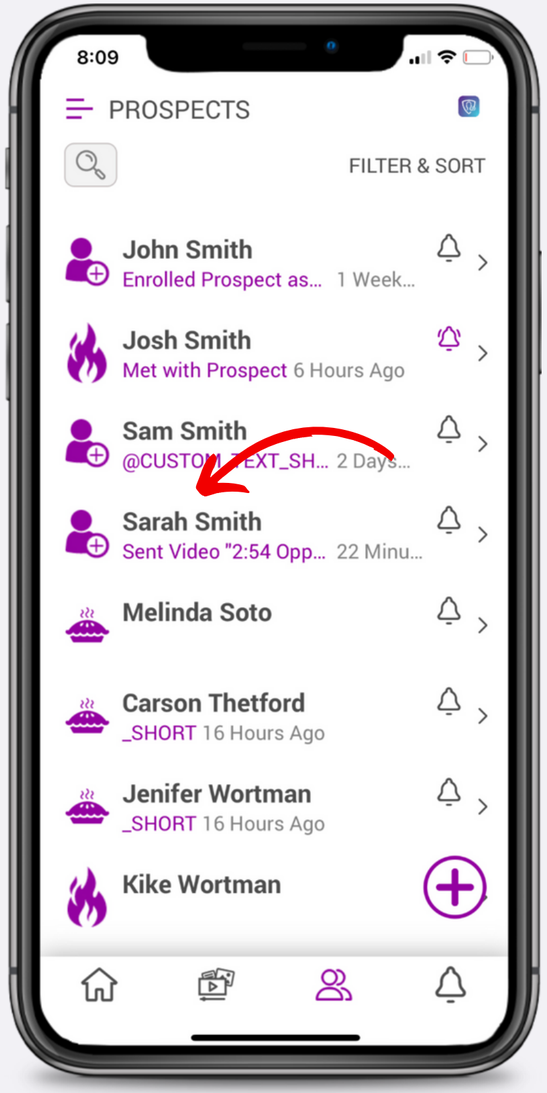
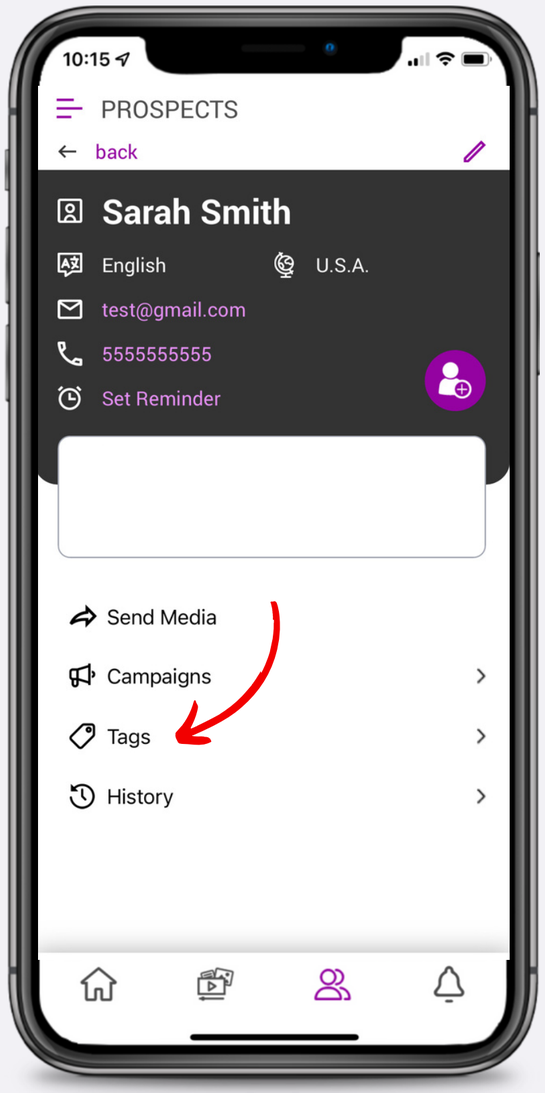
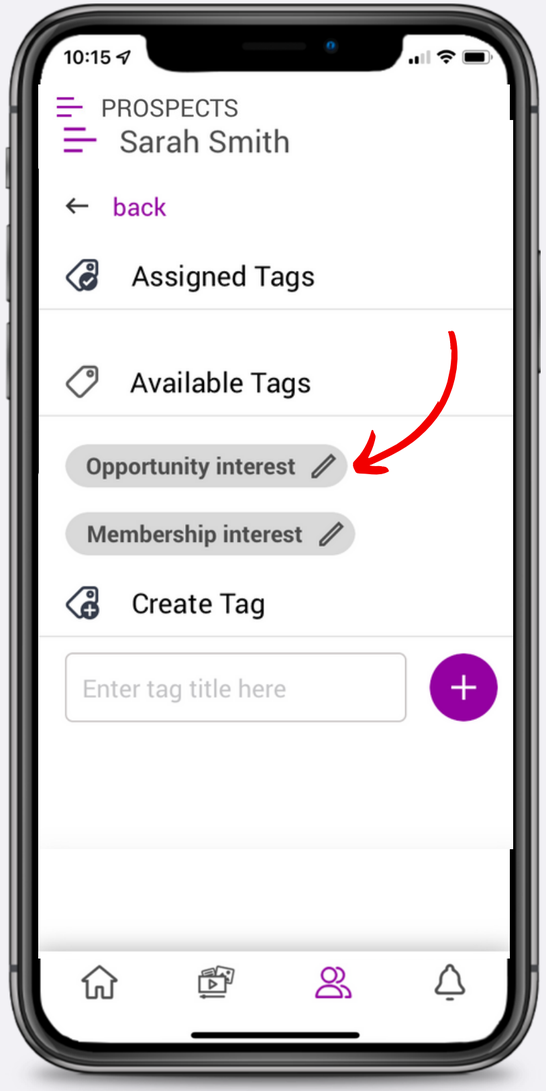
How to Add/Remove Tags









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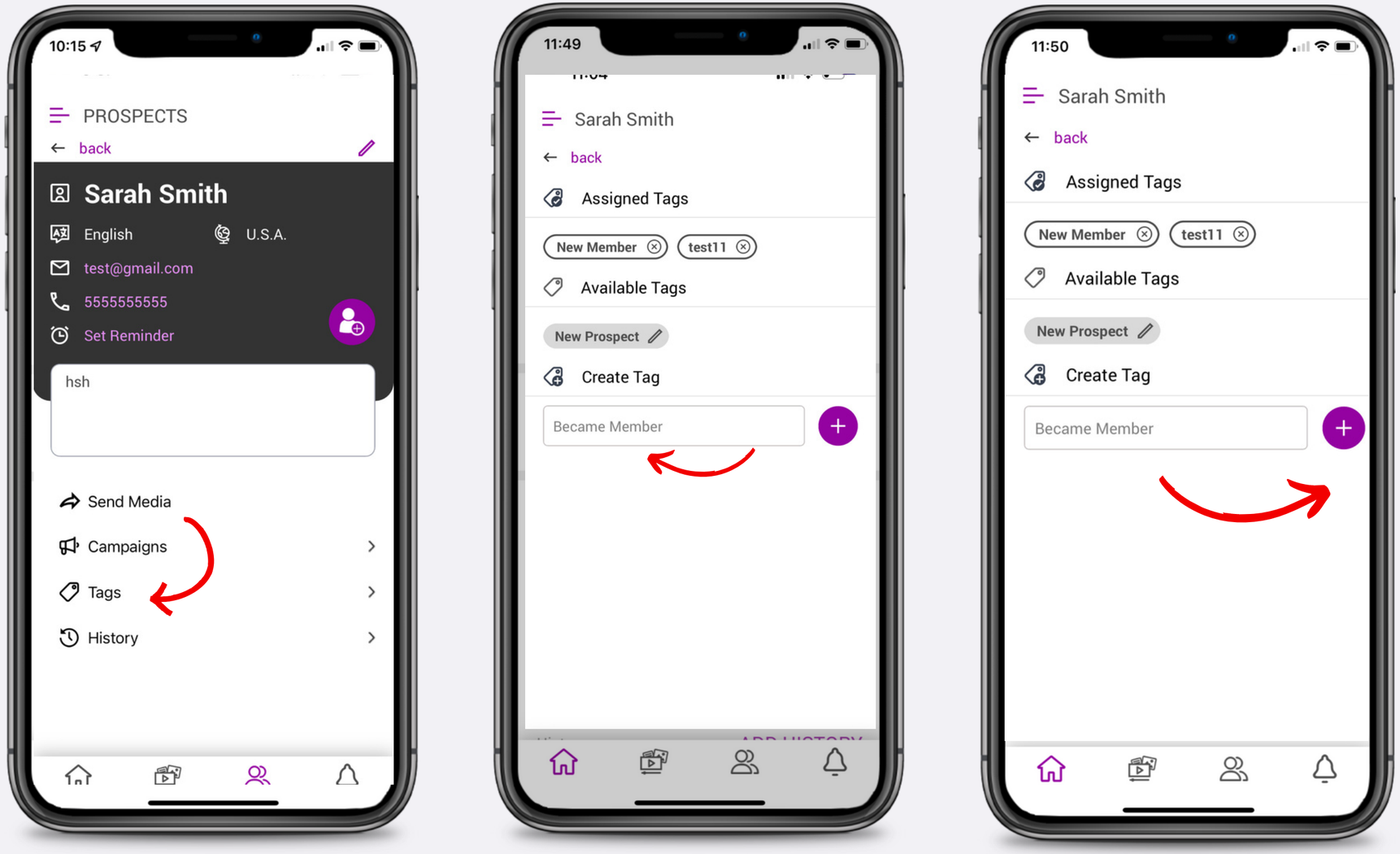
How to Add a Tag Category



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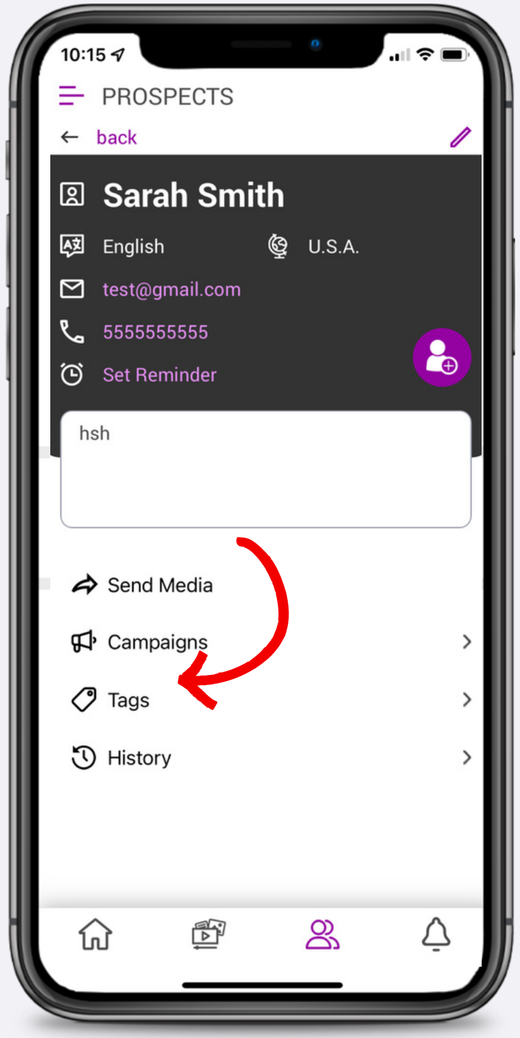
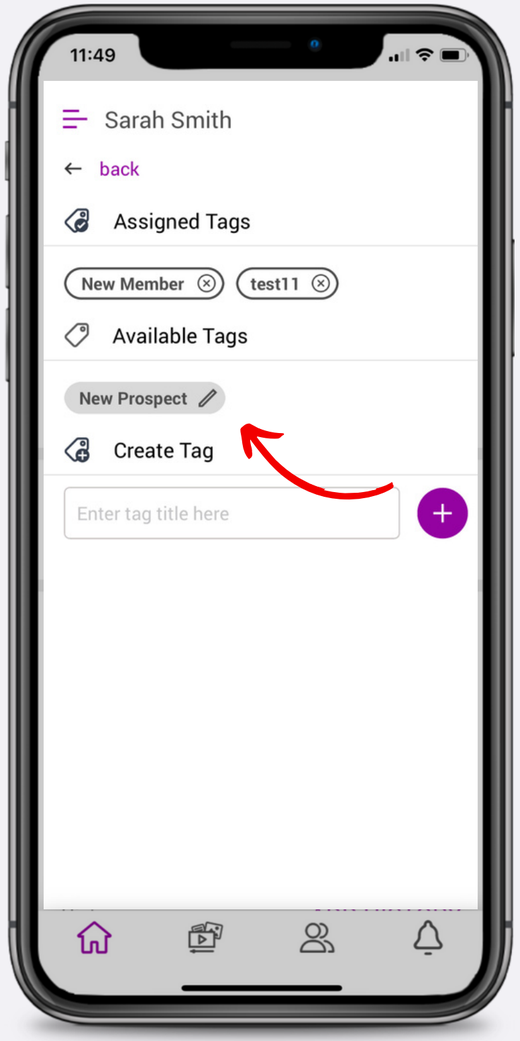
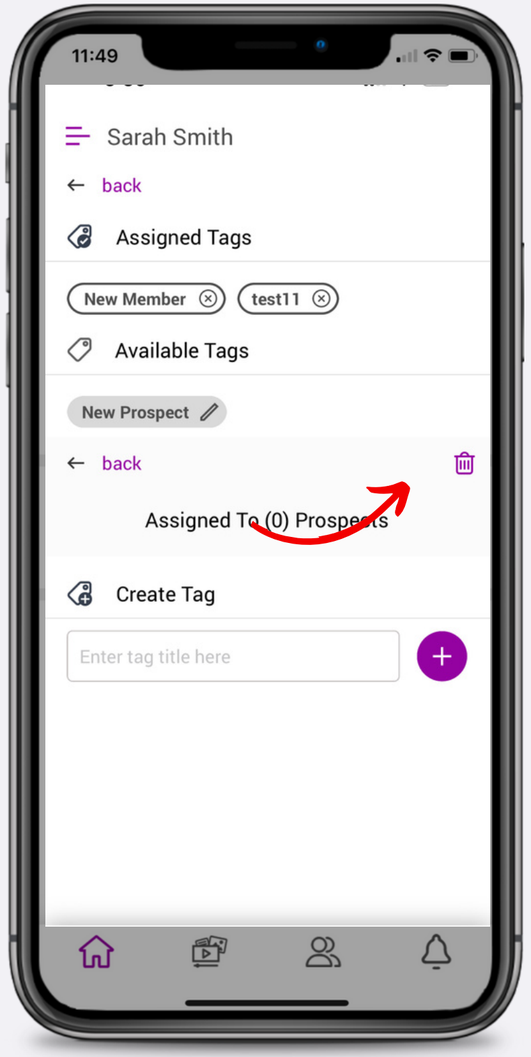
LegalShield/IDShield

How to Remove a Tag Category







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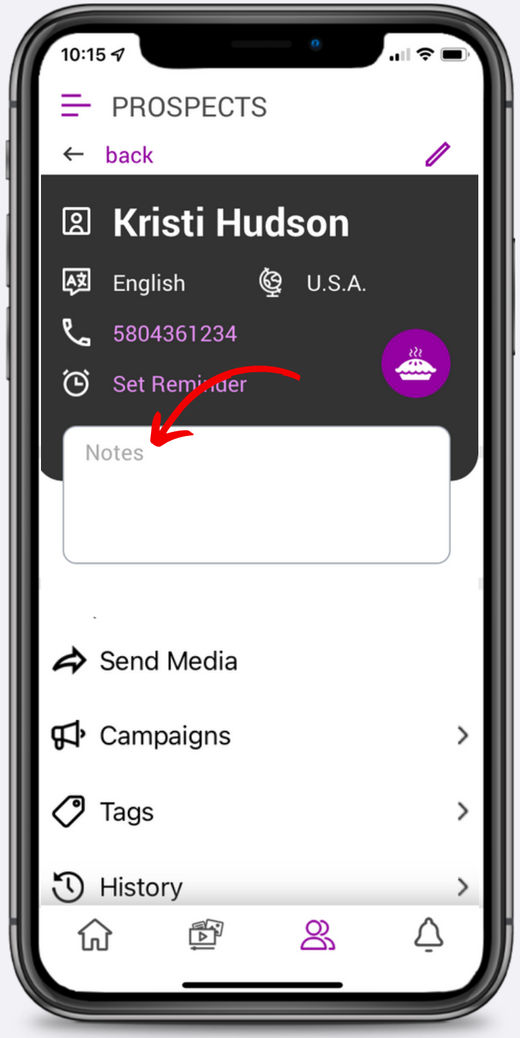
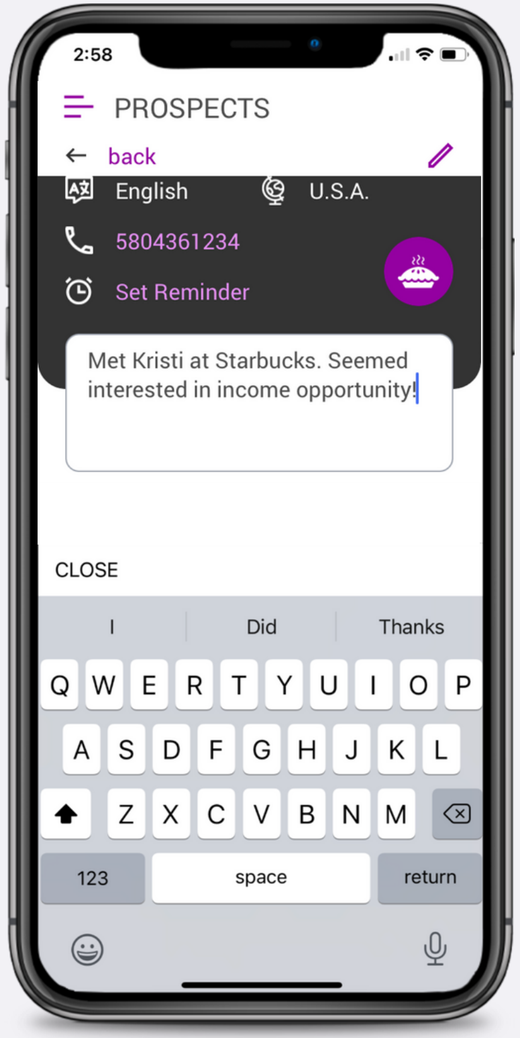
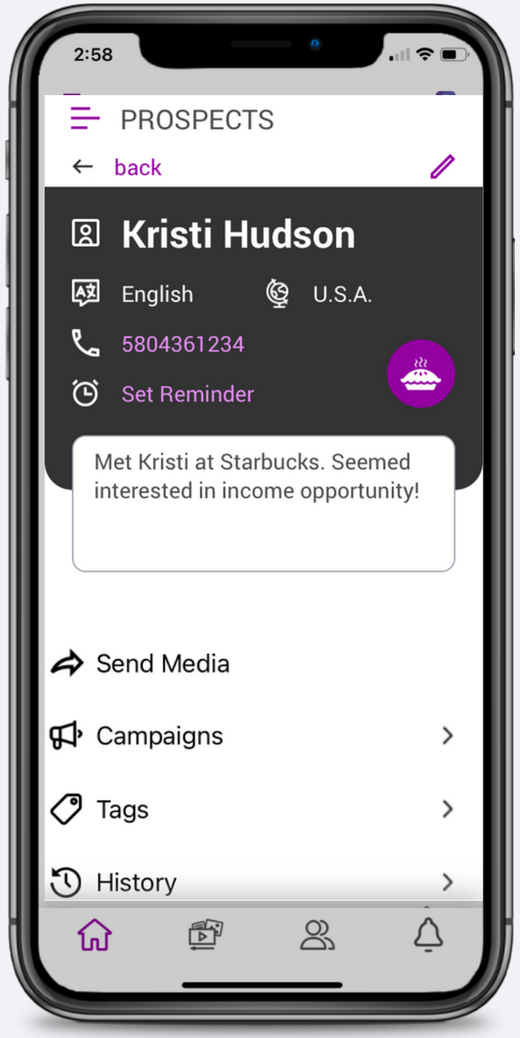
LegalShield/IDShield

How to Add Notes







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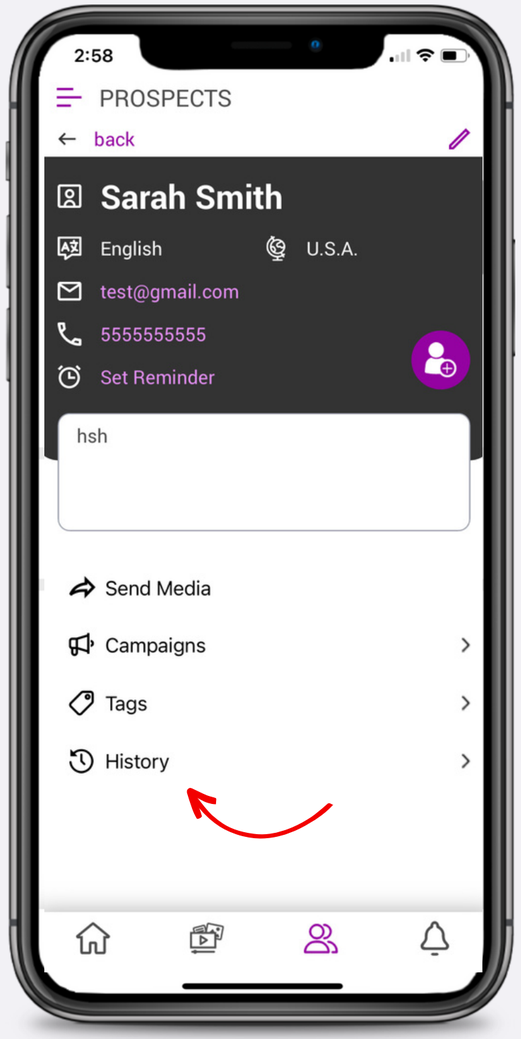
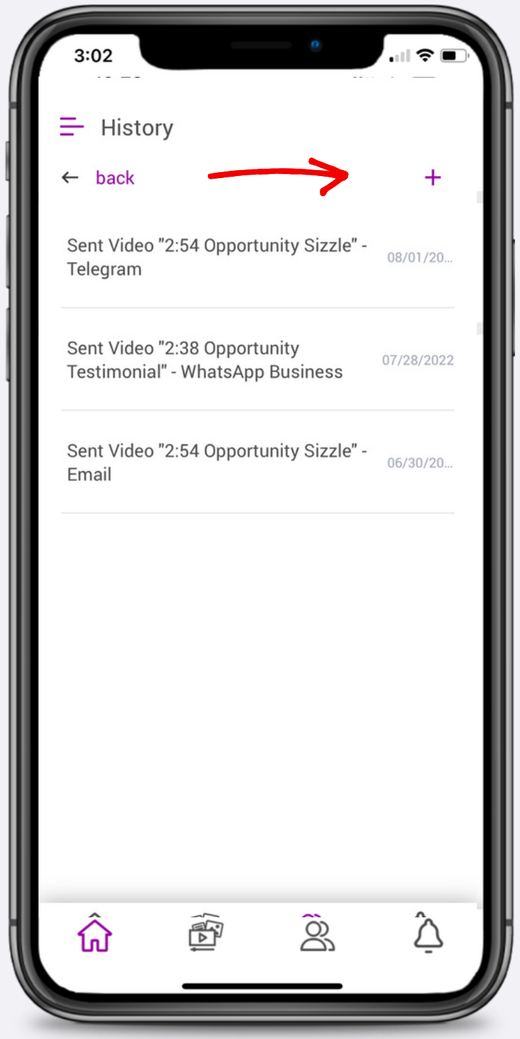
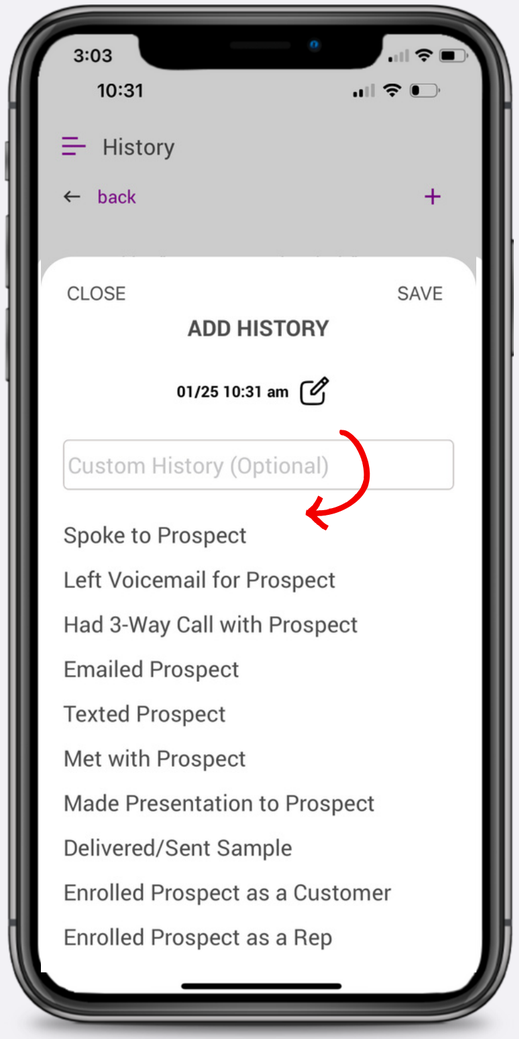
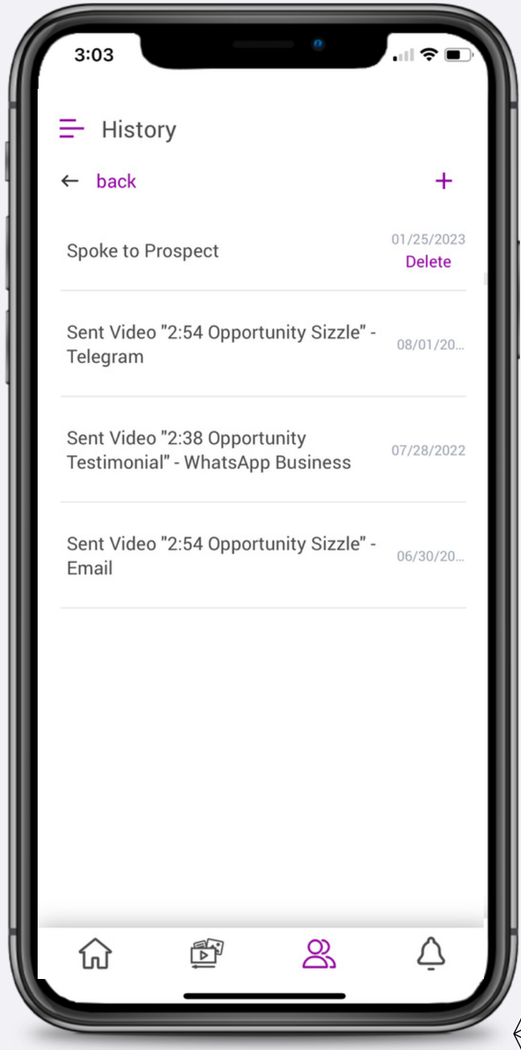
LegalShield/IDShield

How to Add History









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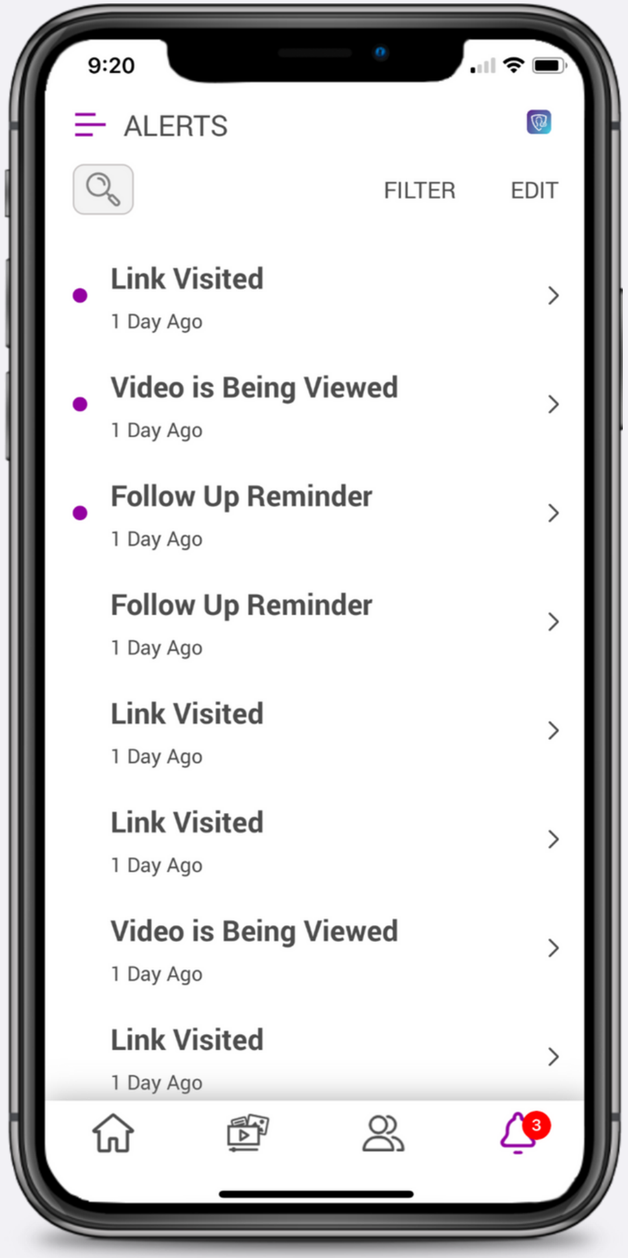
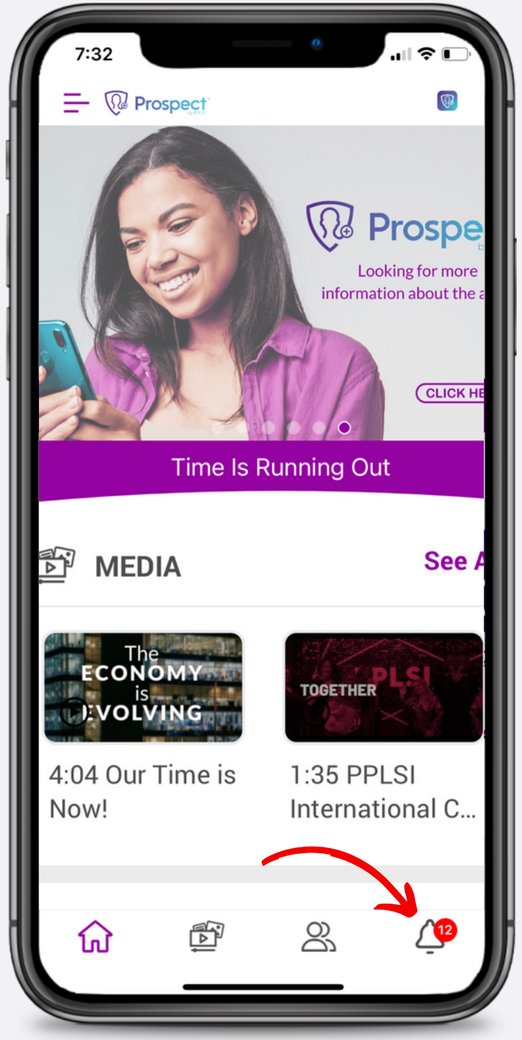
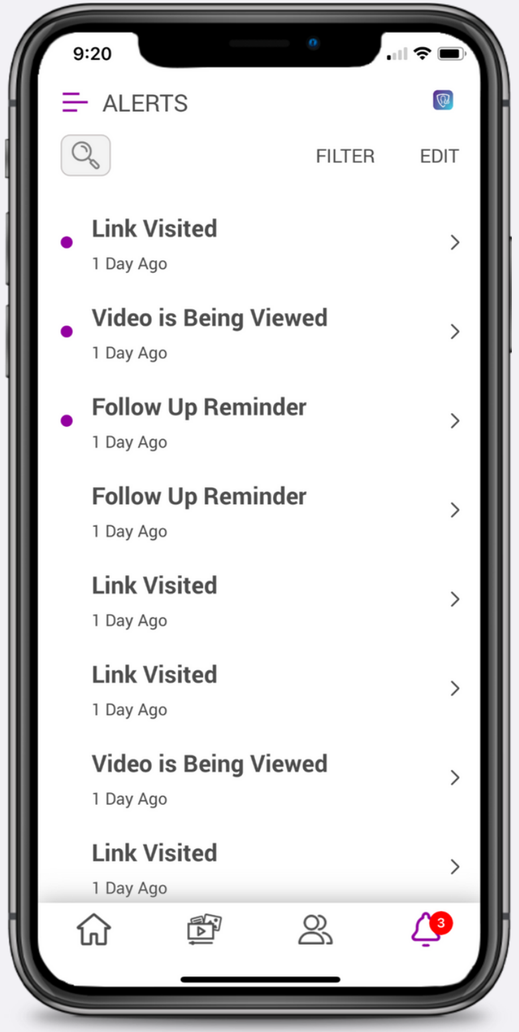
LegalShield/IDShield


9:20
ALERTS
FILTER
EDIT
Link Visited
1 Day Ago
Video is Being Viewed
1 Day Ago
Follow Up Reminder
1 Day Ago
Follow Up Reminder
1 Day Ago
Link Visited
1 Day Ago
Link Visited
1 Day Ago
Video is Being Viewed
1 Day Ago
Link Visited
1 Day Ago
3

ALERTS

How to Access Alerts

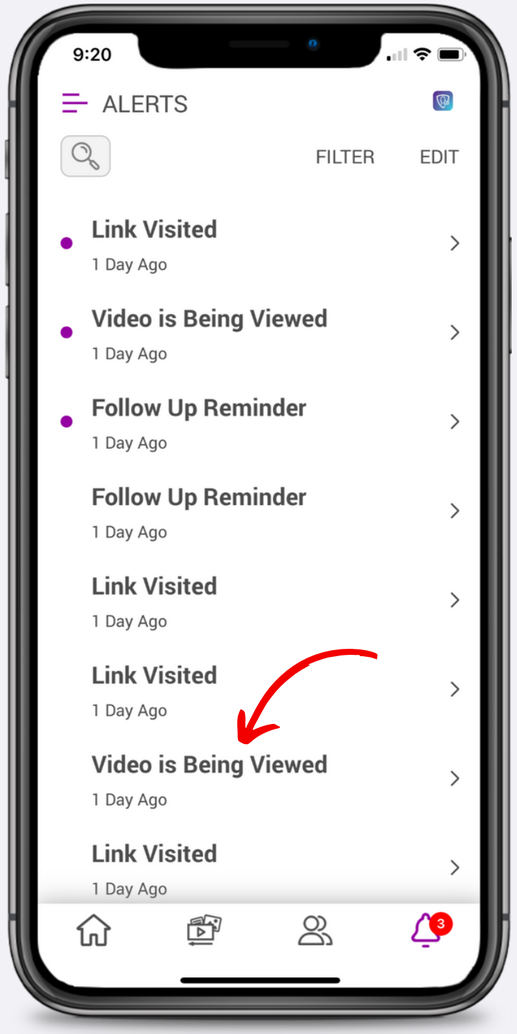


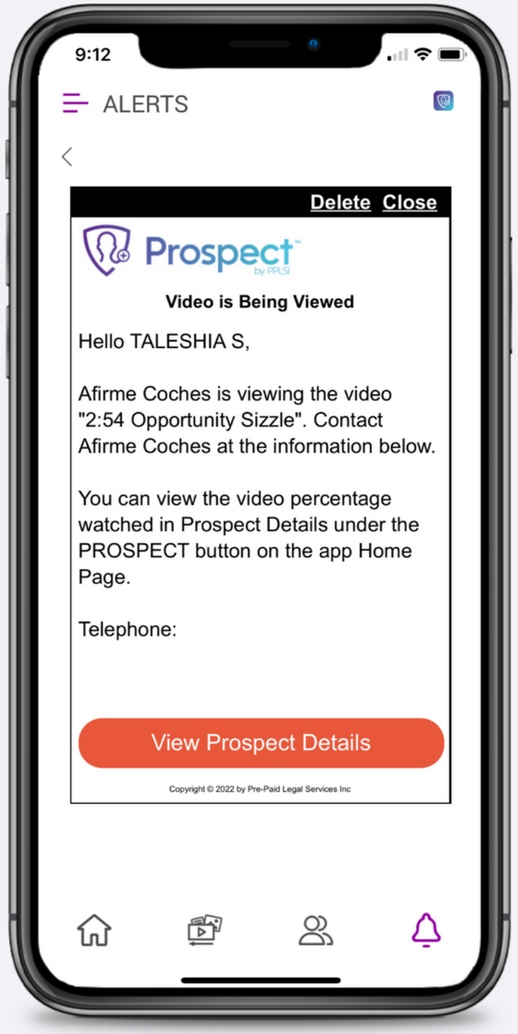


PPLSI

LegalShield/IDShield

How to Read Alerts

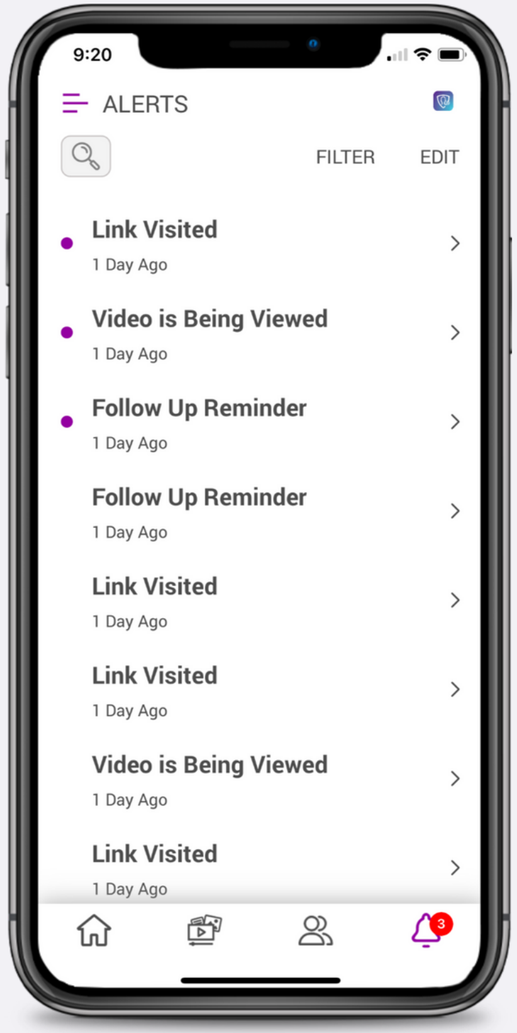


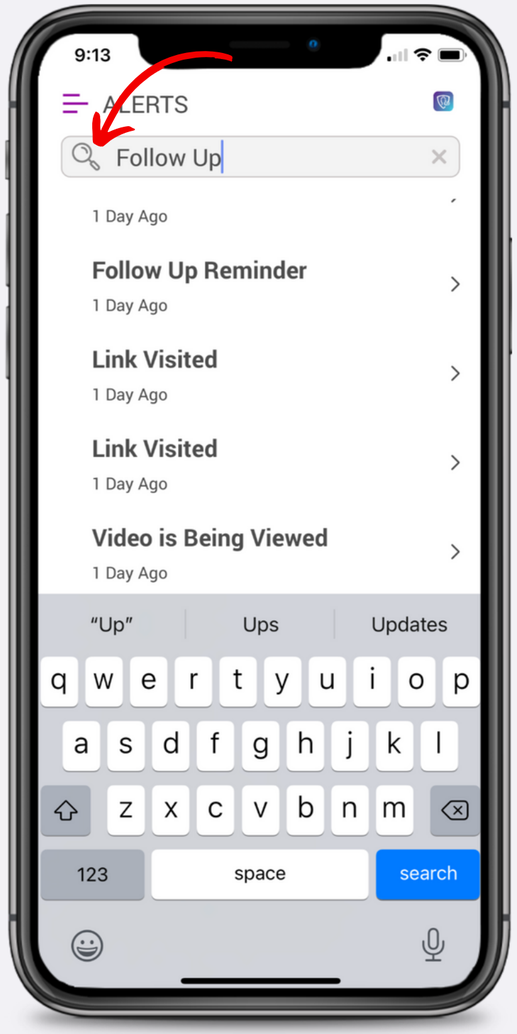


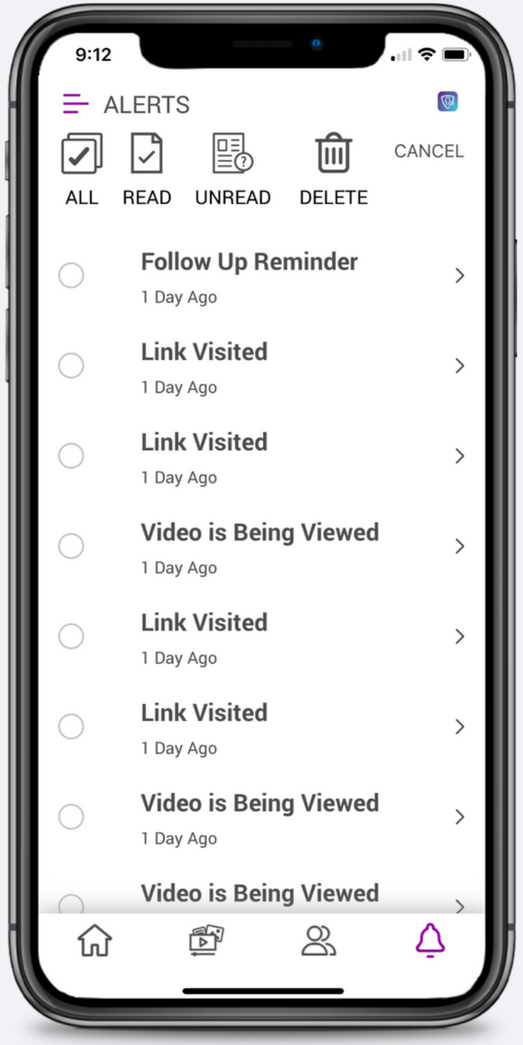
PPLSI

LegalShield/IDShield

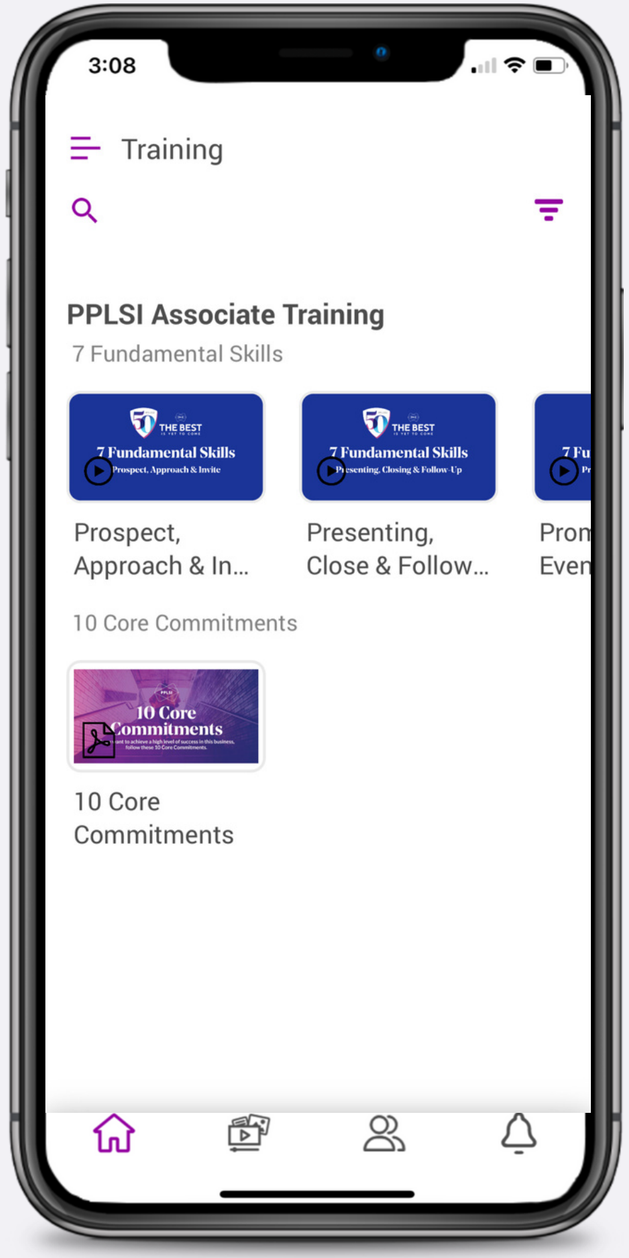
How to Manage Alerts





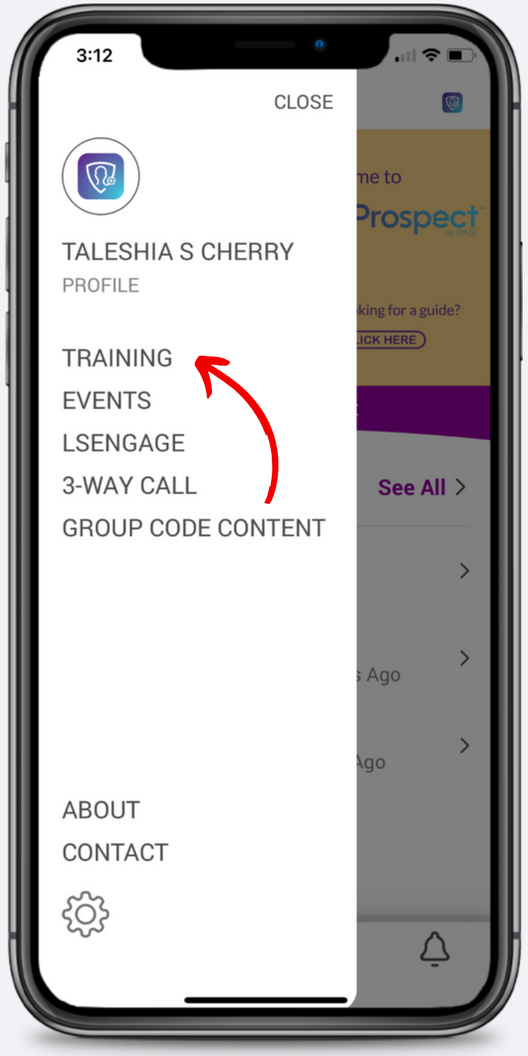


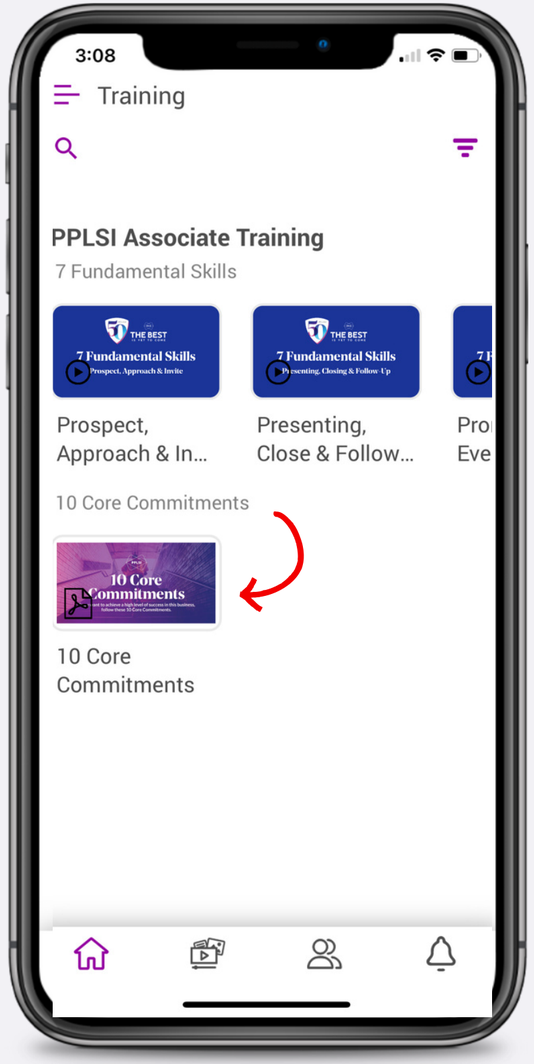
PPLSI
LegalShield/IDShield

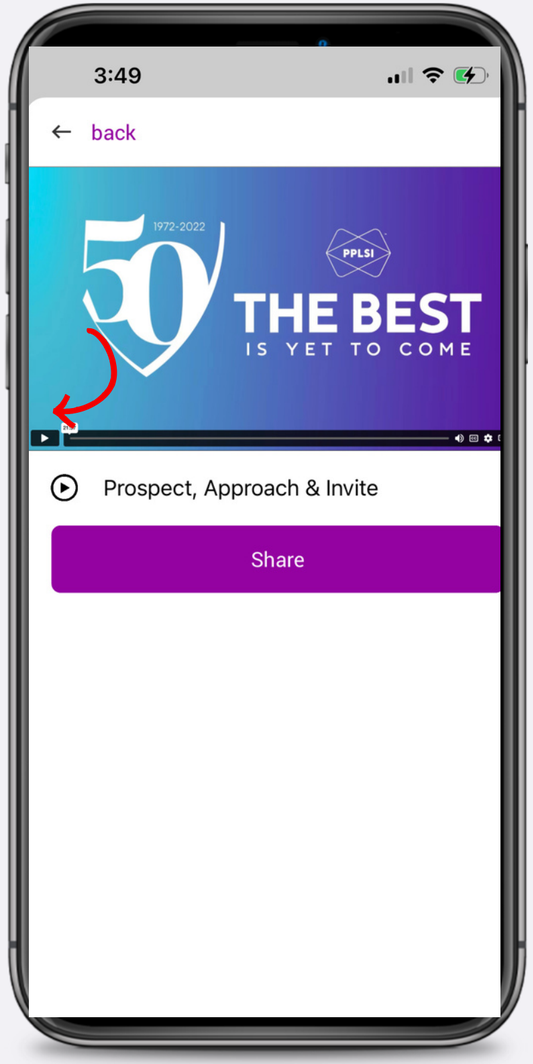


ASSOCIATE TRAINING

How to Watch Training



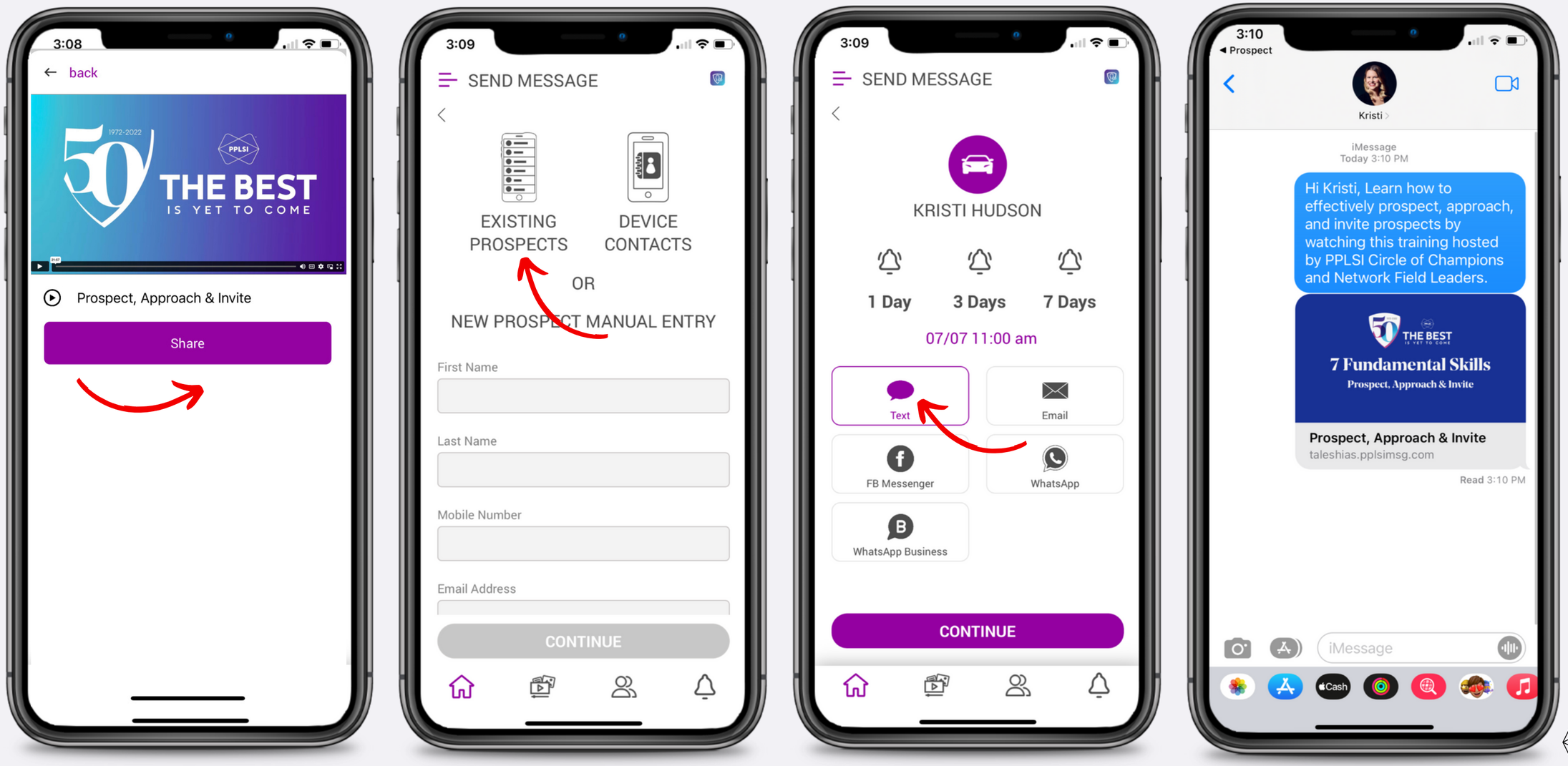




PPLSI

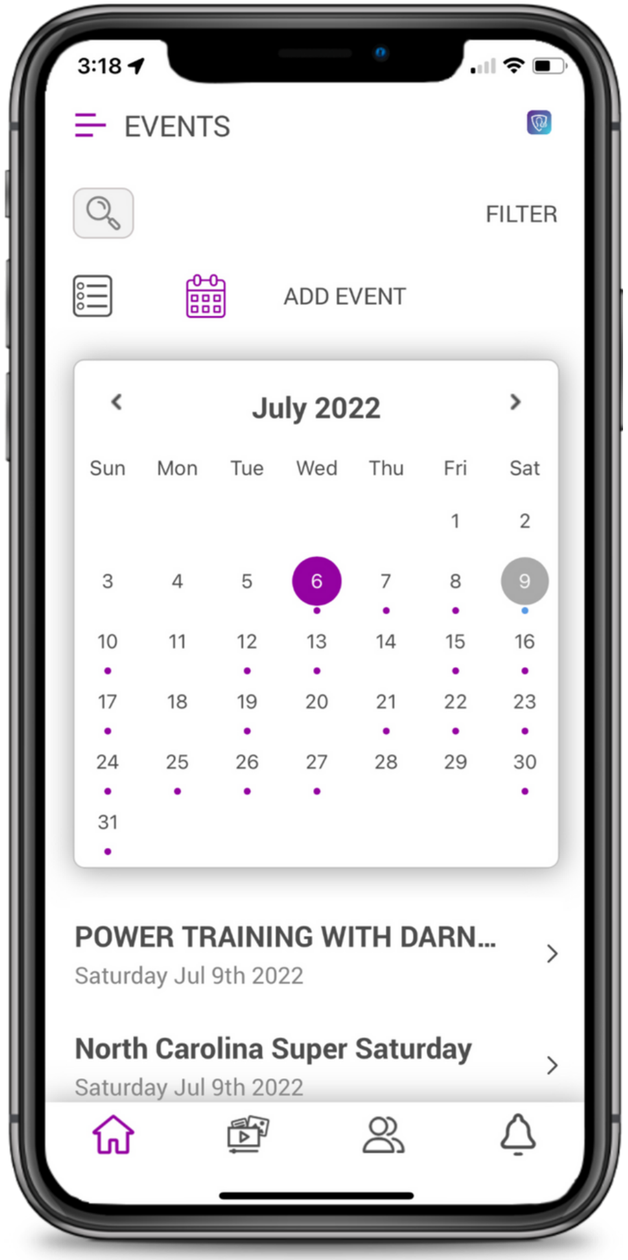
LegalShield/IDShield

How to Share Training



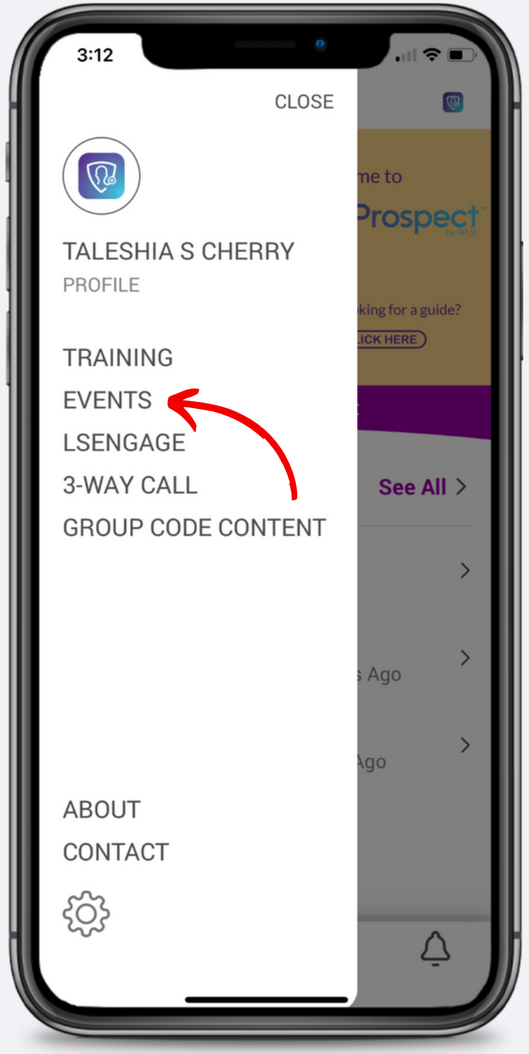
PPLSI

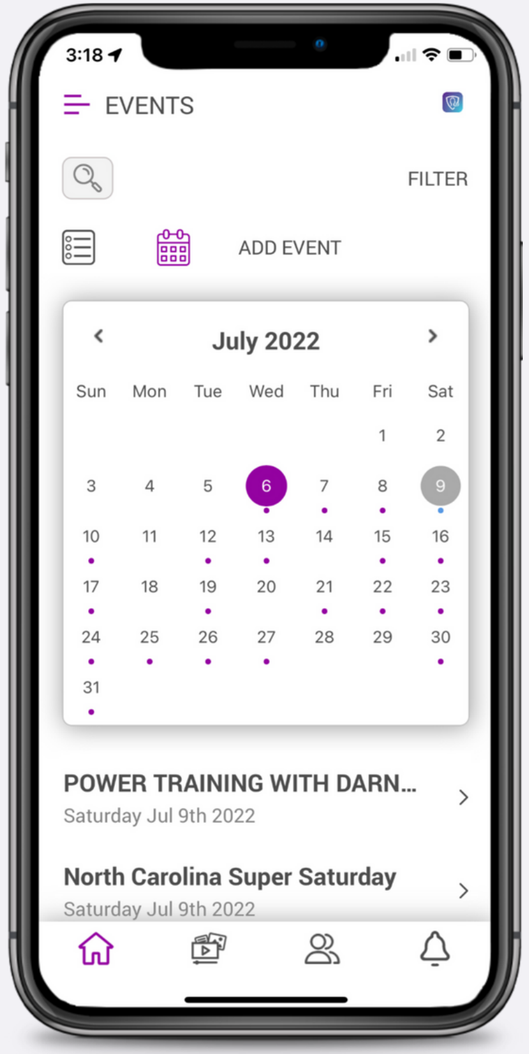
LegalShield/IDShield


3:18
EVENTS
FILTER
ADD EVENT
July 2022
Sun Mon Tue Wed Thu Fri Sat
1 2
3 4 5 6 7 8 9
10 11 12 13 14 15 16
17 18 19 20 21 22 23
24 25 26 27 28 29 30
31
POWER TRAINING WITH DARN...
Saturday Jul 9th 2022
North Carolina Super Saturday
Saturday Jul 9th 2022

EVENTS

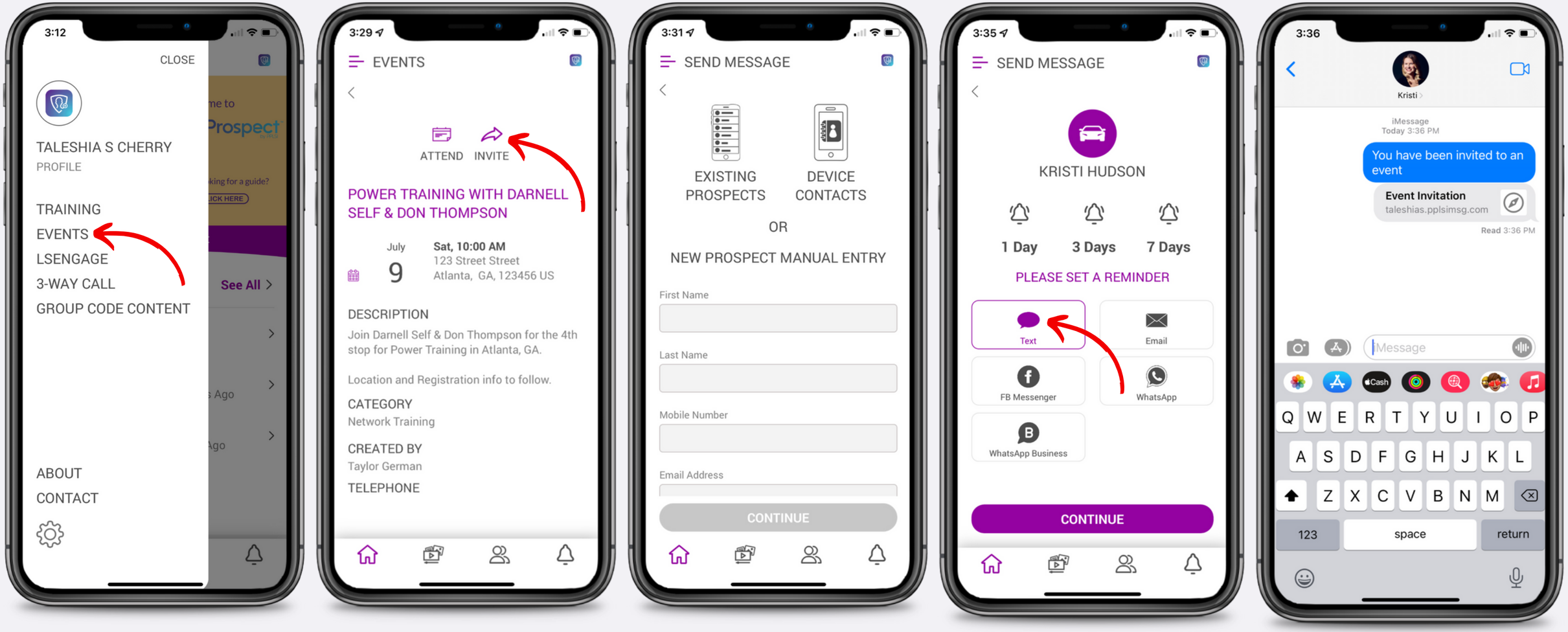
How to Access Events



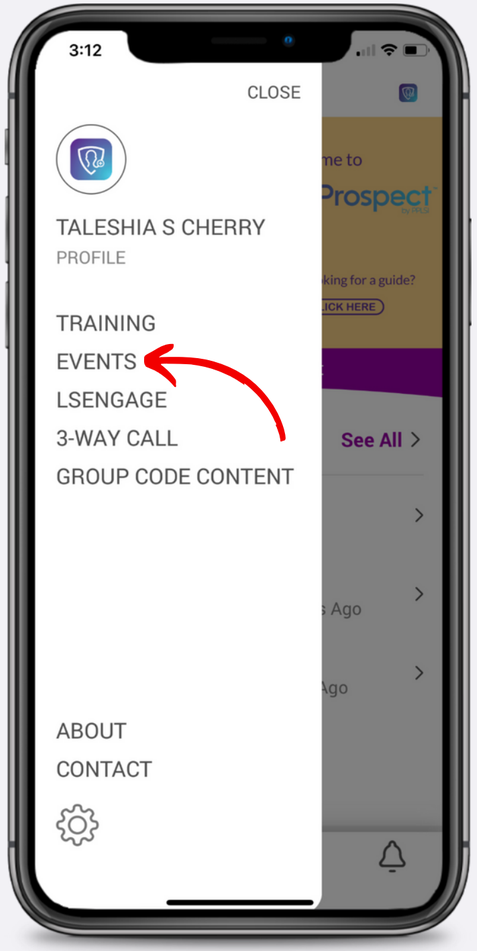


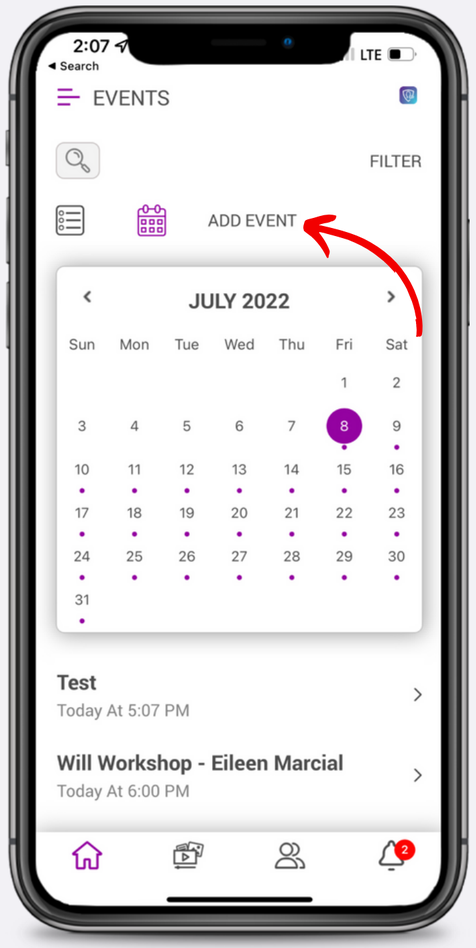
PPLSI
LegalShield/IDShield

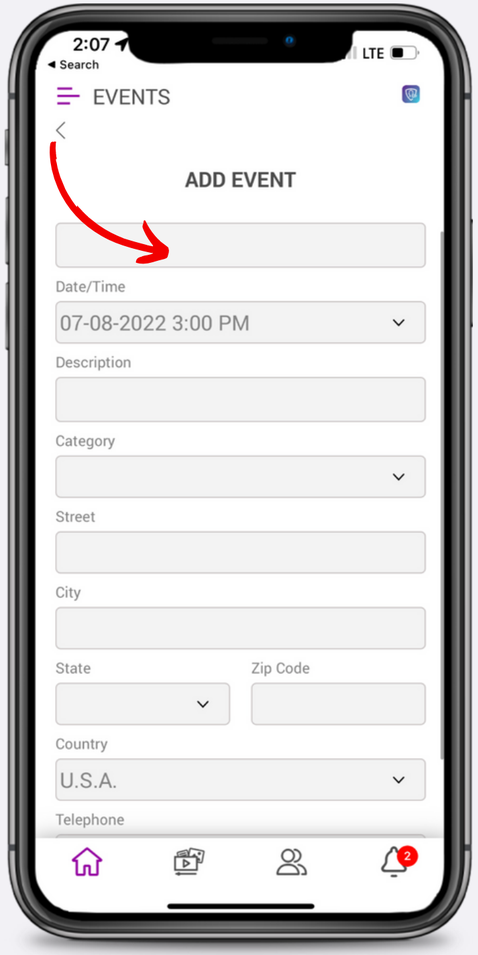
How to Invite to Events

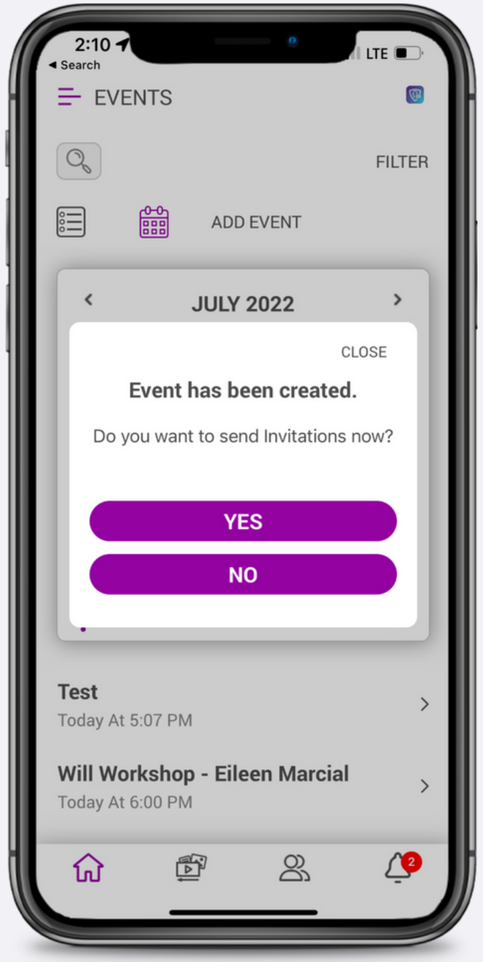


How to Add Personal Events



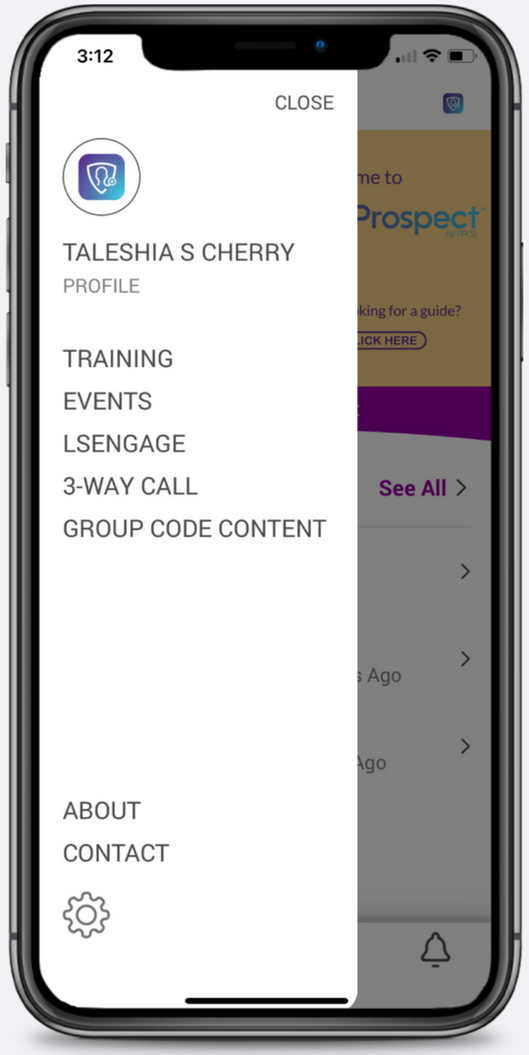


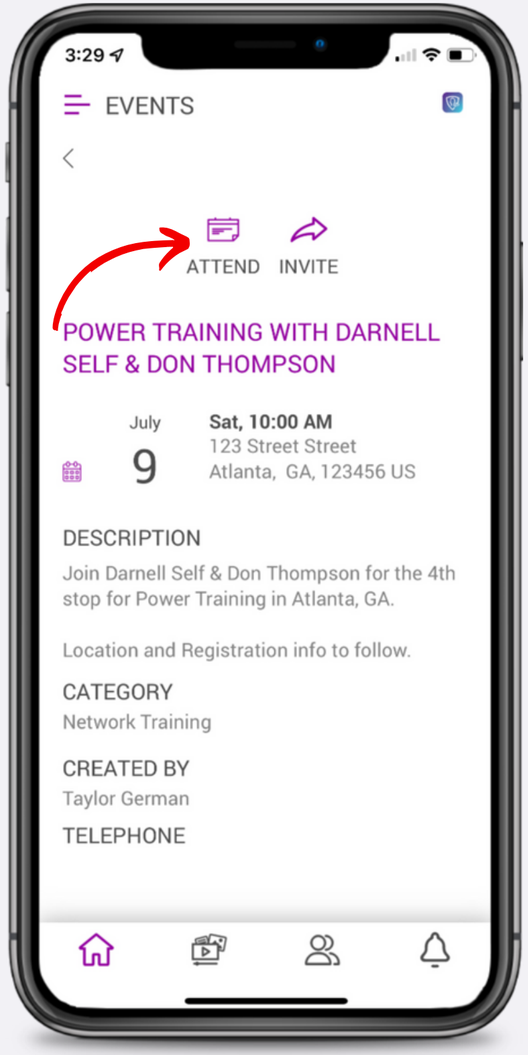


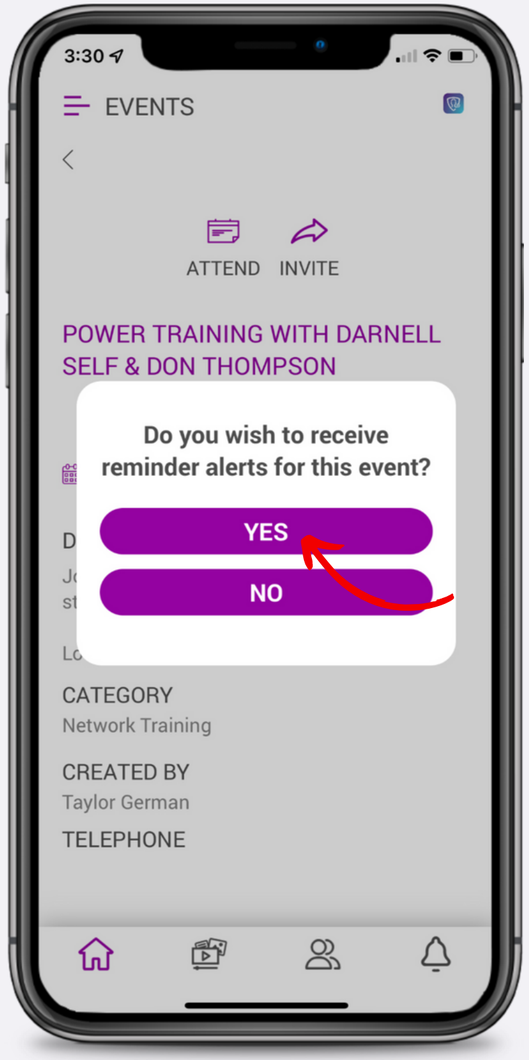


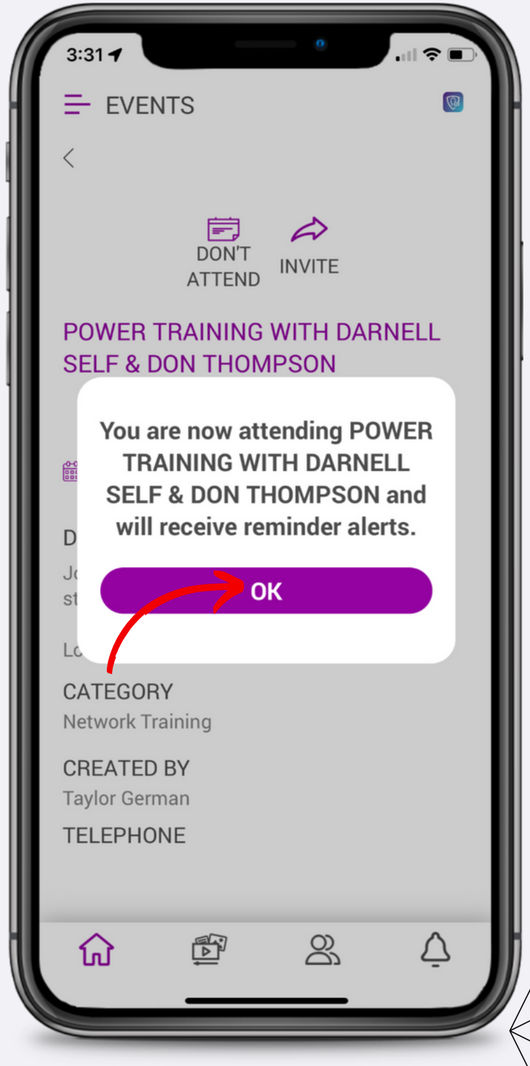
PPLSI
LegalShield/IDShield

How to Get Event Alerts







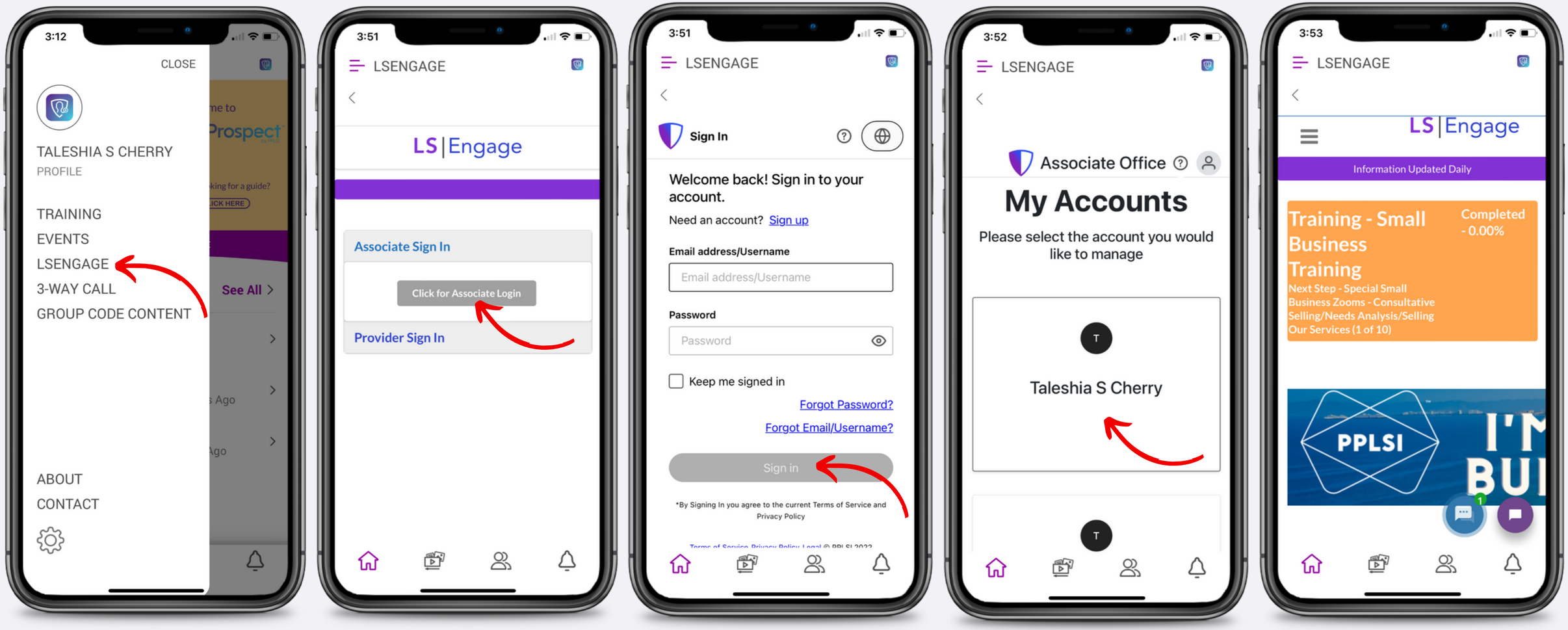


PPLSI
LegalShield/IDShield

3:53
LSENGAGE
LS | Engage
Information Updated Daily
Training - Small Business Training
Completed - 0.00%
Next Step - Special Small Business Zooms - Consultative Selling/Needs Analysis/Selling Our Services (1 of 10)
PPLSI

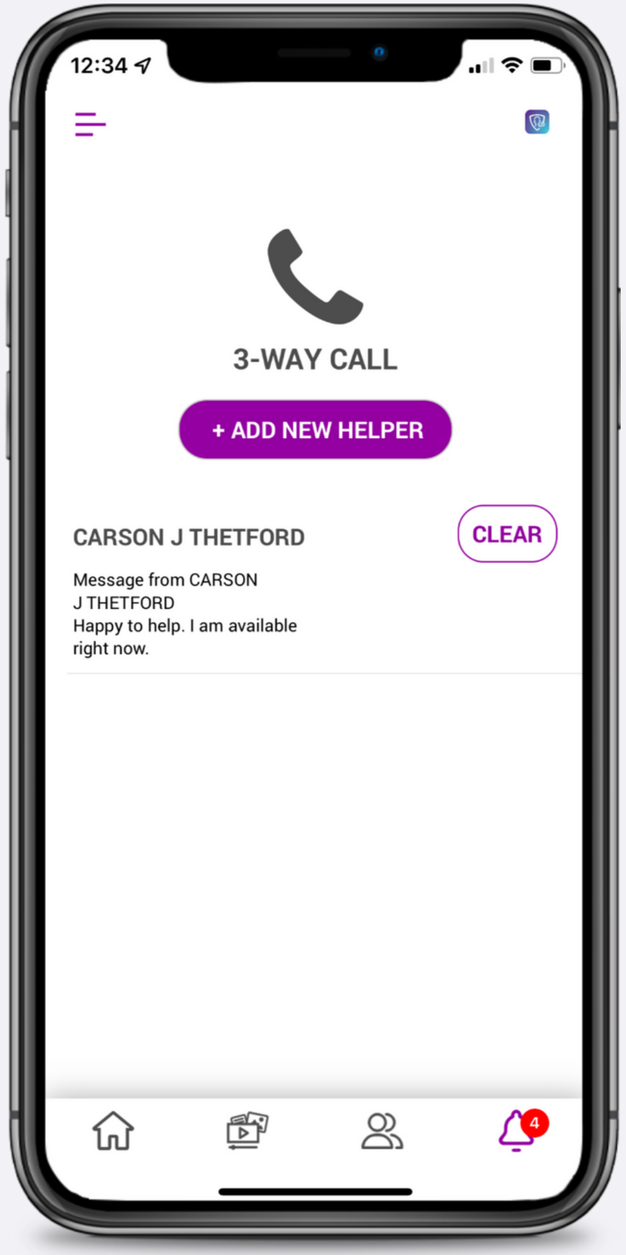
LSENGAGE

How to Access LSEngage



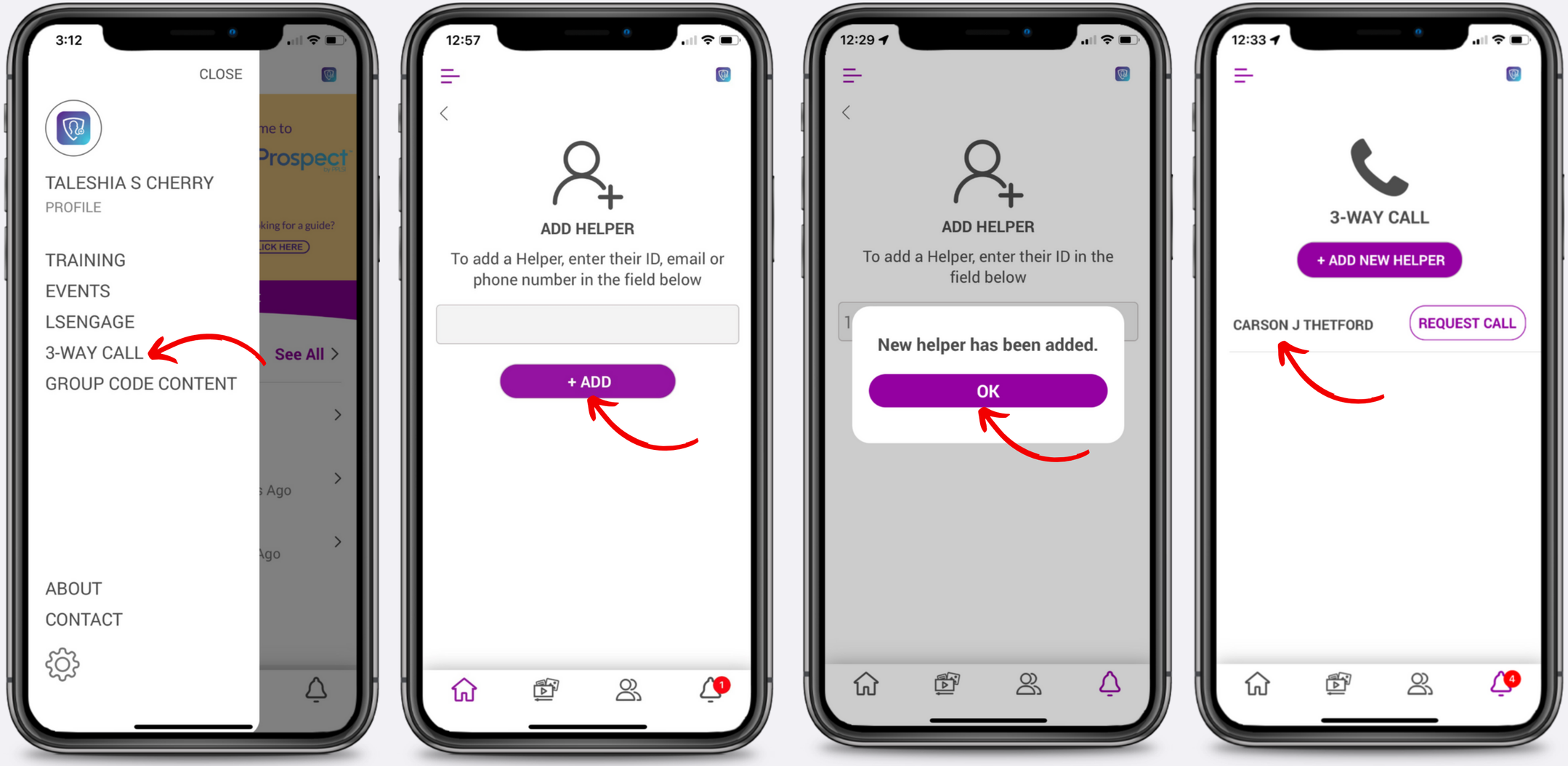
PPLSI

LegalShield/IDShield

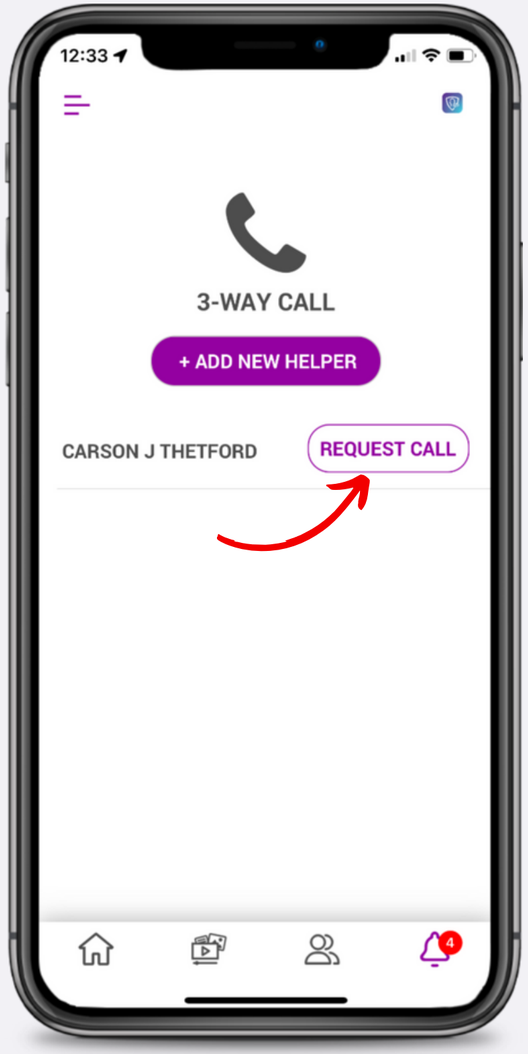

12:34
3-WAY CALL
+ ADD NEW HELPER
CARSON J THETFORD
CLEAR
Message from CARSON
J THETFORD
Happy to help. I am available
right now.
4

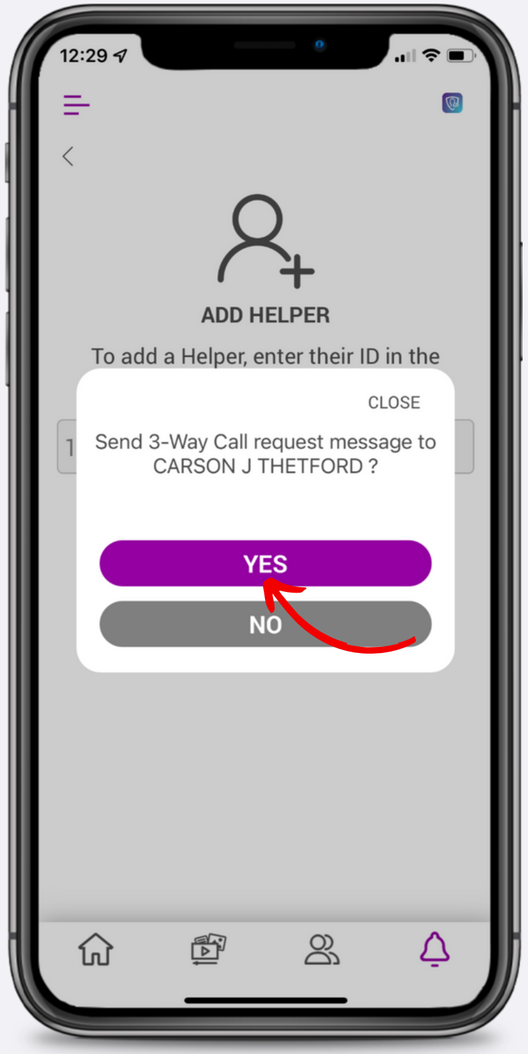
3-WAY CALLS

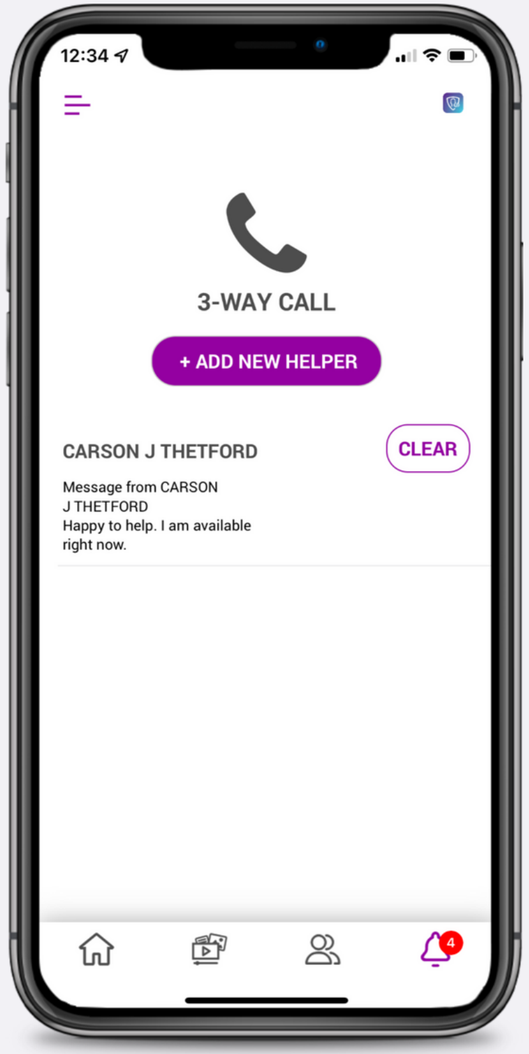
How to Add a 3-Way Call Helper



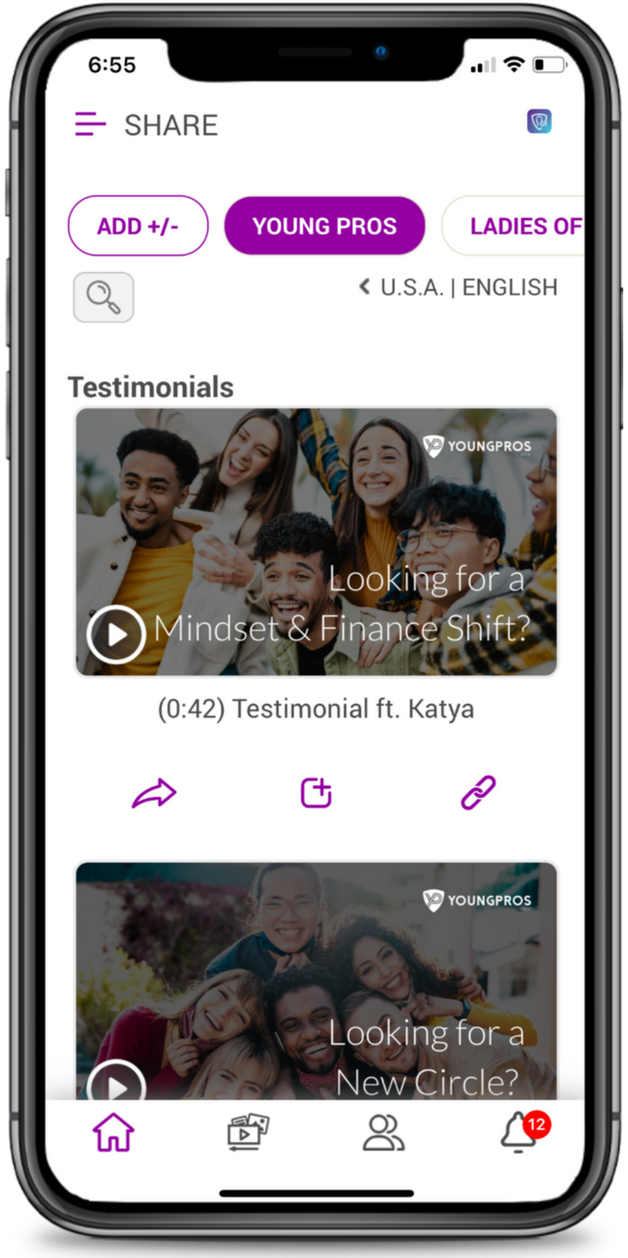
How to Request 3-Way Call Availability







PPLSI
LegalShield/IDShield


6:55
SHARE
ADD +/-
YOUNG PROS
LADIES OF
U.S.A. | ENGLISH
Testimonials
YOUNGPROS
Looking for a
Mindset & Finance Shift?
(0:42) Testimonial ft. Katya
YOUNGPROS
Looking for a
New Circle?
12

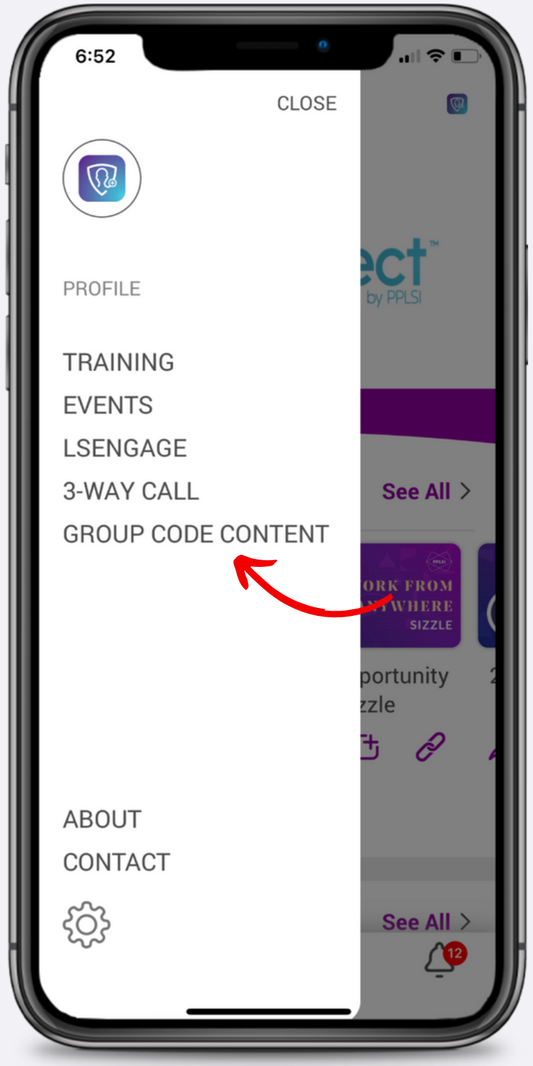
GROUP CODES

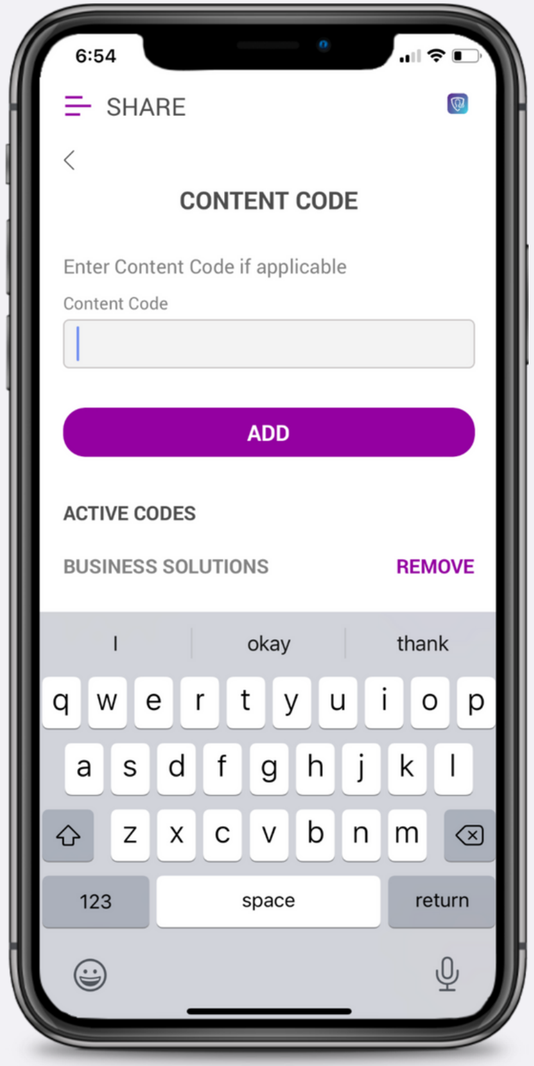
How to Add Find Group Codes

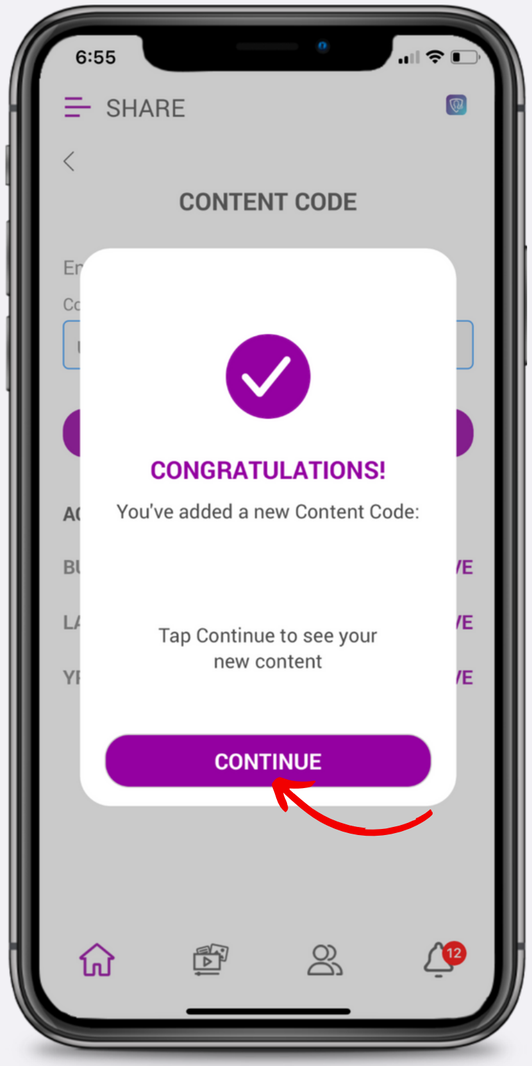
Resources	Group Code
Ladies of Justice	LOJ
Young Pros	YP
Business Solutions	Solutions
American Sign Language	ASL
Member Retention	Retention
Member & Associate Onboarding	Onboarding

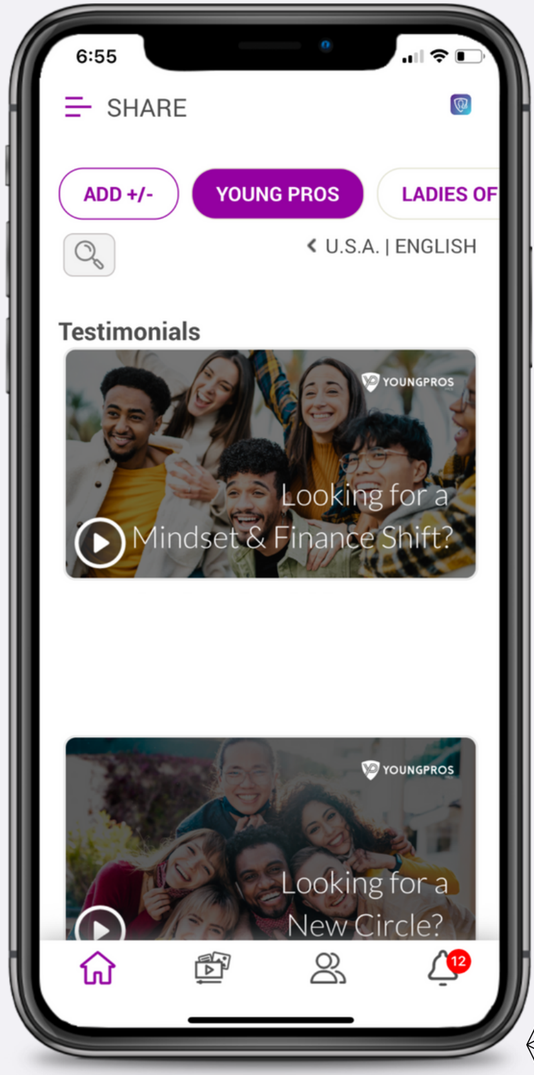
Ask your upline for information on team codes!

How to Add Group Codes



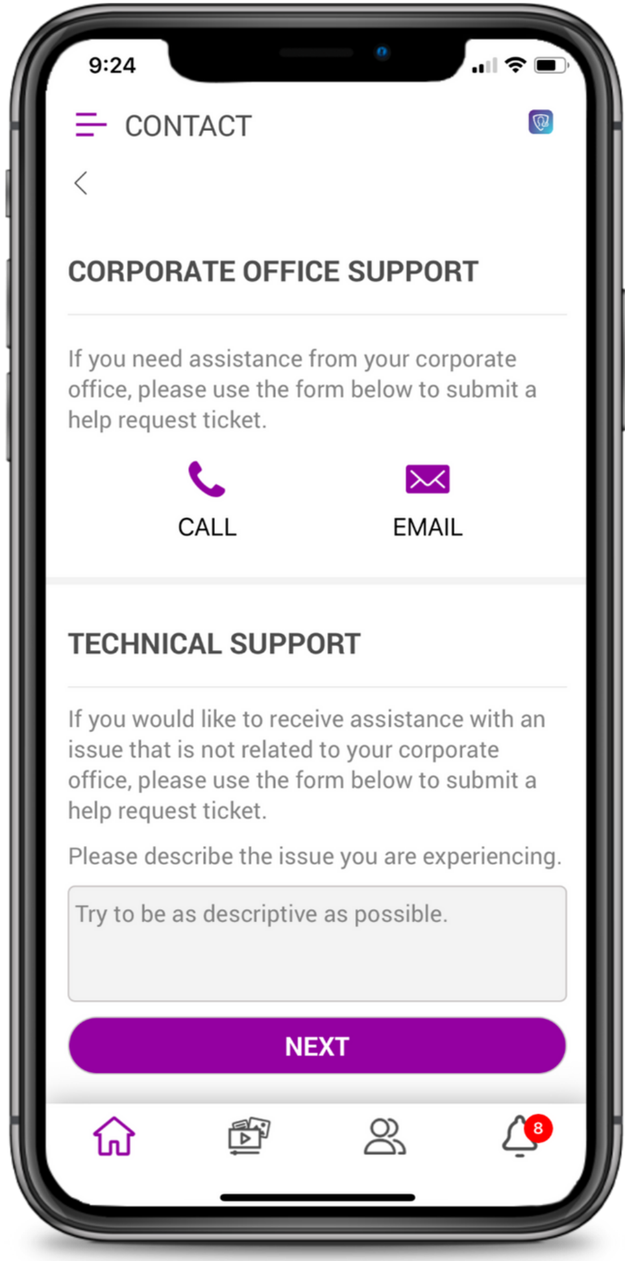






PPLSI

LegalShield/IDShield


9:24
CONTACT
CORPORATE OFFICE SUPPORT
If you need assistance from your corporate office, please use the form below to submit a help request ticket.
CALL
EMAIL
TECHNICAL SUPPORT
If you would like to receive assistance with an issue that is not related to your corporate office, please use the form below to submit a help request ticket.
Please describe the issue you are experiencing.
Try to be as descriptive as possible.
NEXT
8

SUPPORT

Contact Your Home Office with...

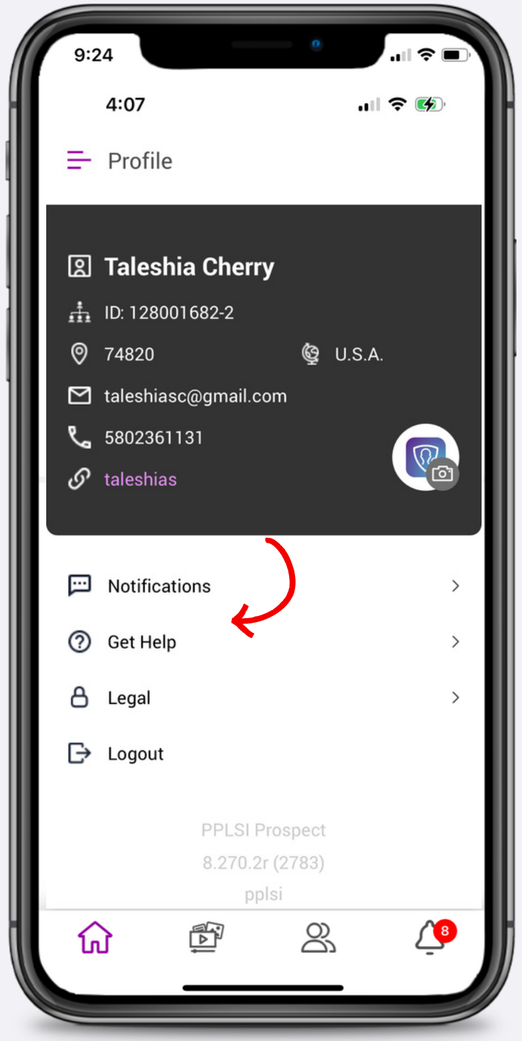
- Questions about your Associate agreement.
- Issues with your PPLSI Advantage subscription.
- Issues logging into your Prospect by PPLSI account.
- Questions/issues with resource content or copy.
- A request for a new resource.
- Issues accessing LSEngage.
- Questions about a contest.
- Questions about a banner promotion.

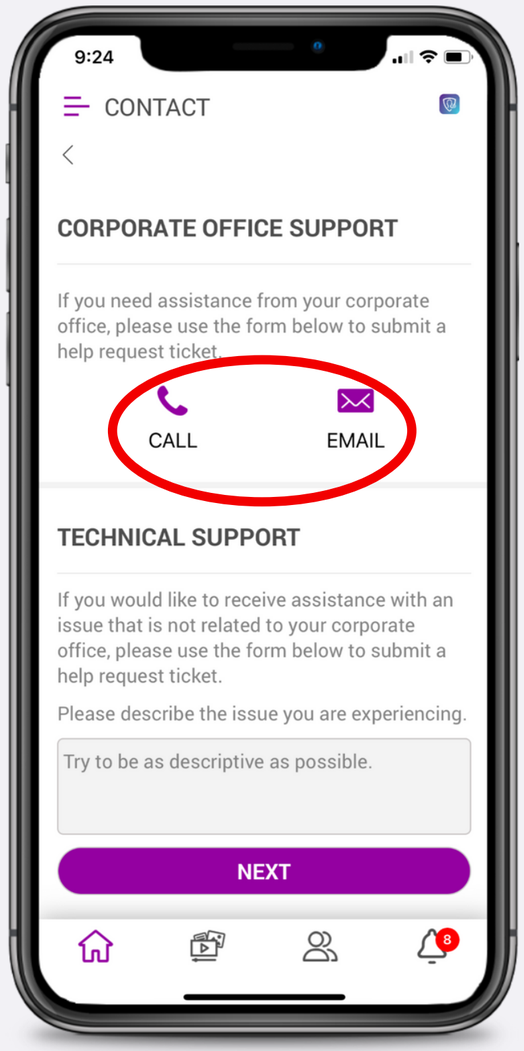
Support is available Monday-Friday, 7:00a-7:00p CT.

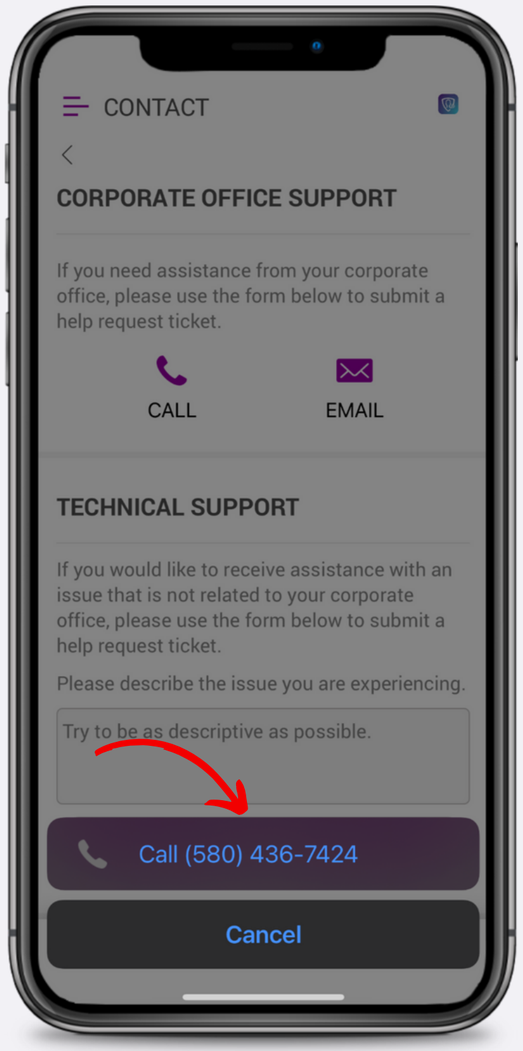
PPLSI

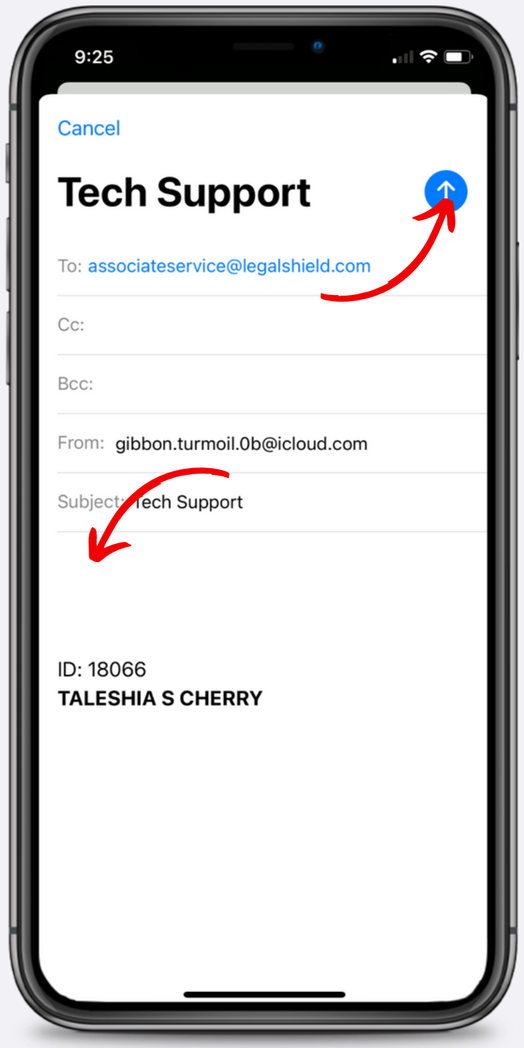
LegalShield/IDShield

How to Contact Your Home Office









PPLSI

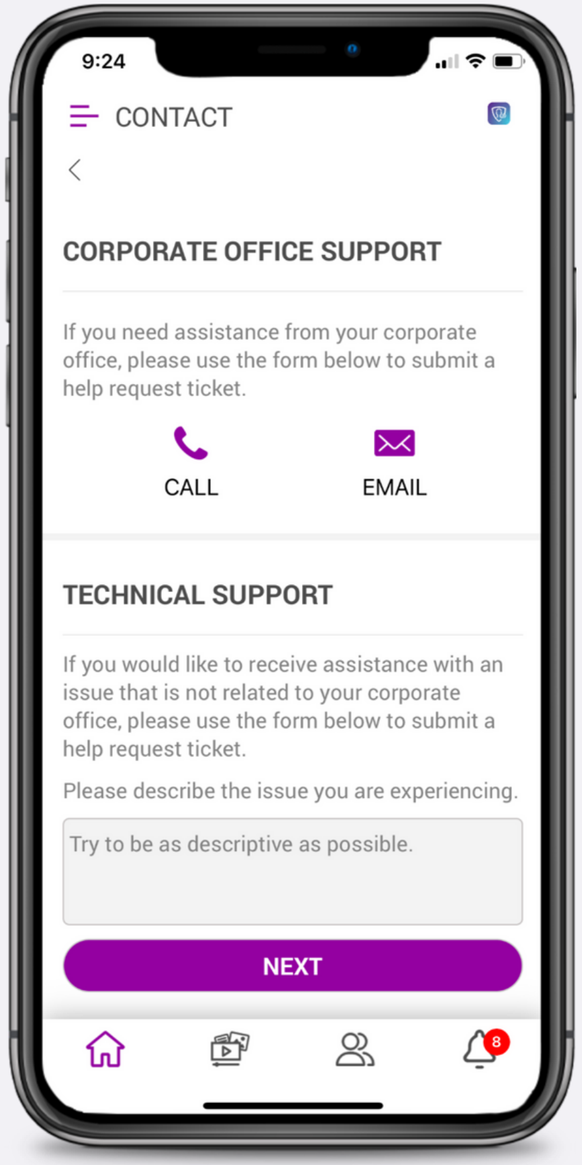
LegalShield/IDShield

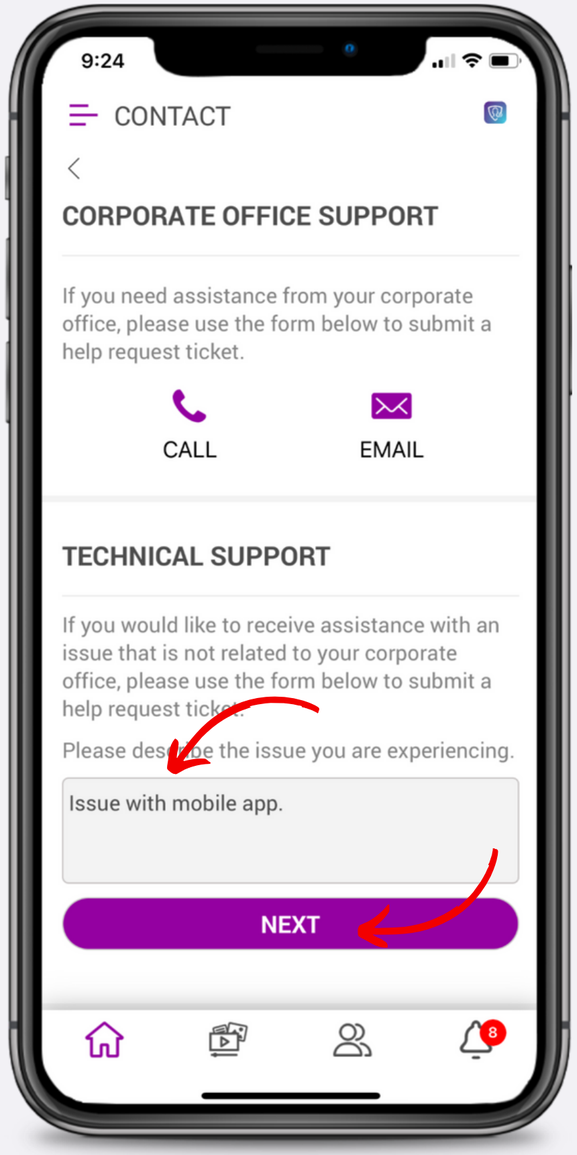
Contact Technical Support with...

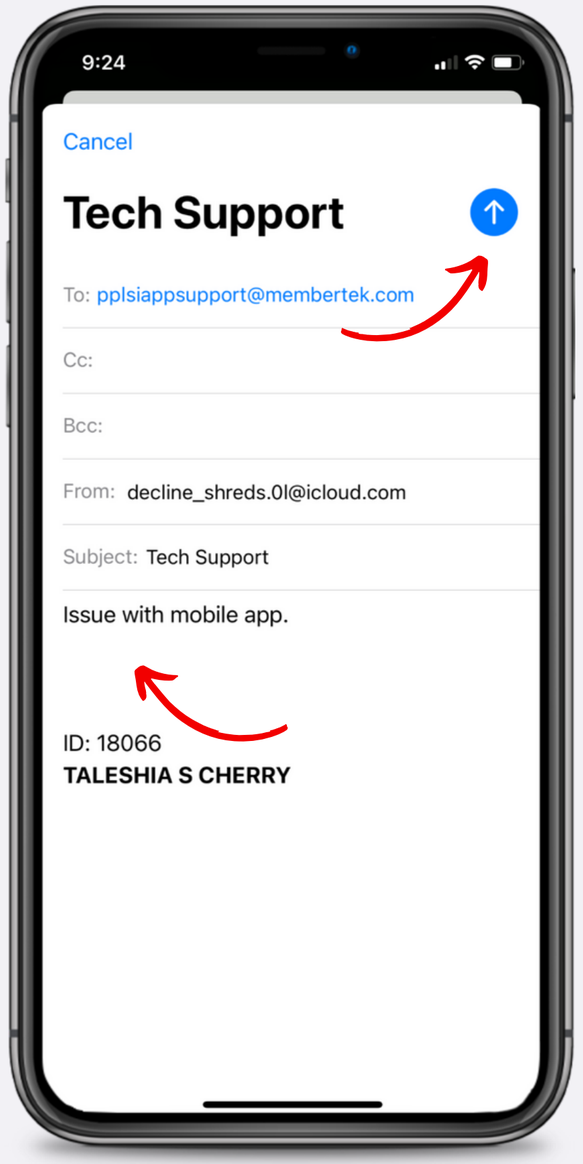
- Issues viewing or sharing resources.
- Issues viewing or sharing events.
- Issues viewing or modifying contacts.
- Issues doing a 3-Way Call.
- If you receive any type of error message.
- If your contact received any type of error message.
- Any technical issue with Prospect by PPLSI.

Support is available Monday-Friday, 7:00a-4:00p CT.

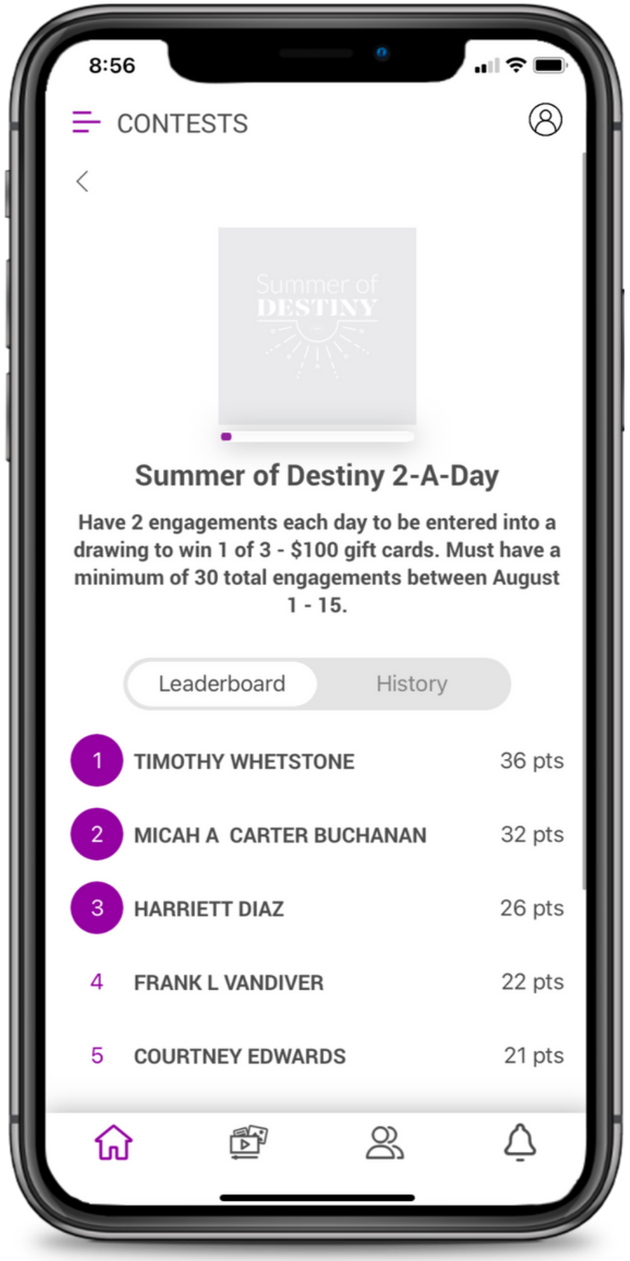
How to Submit a Technical Support Ticket





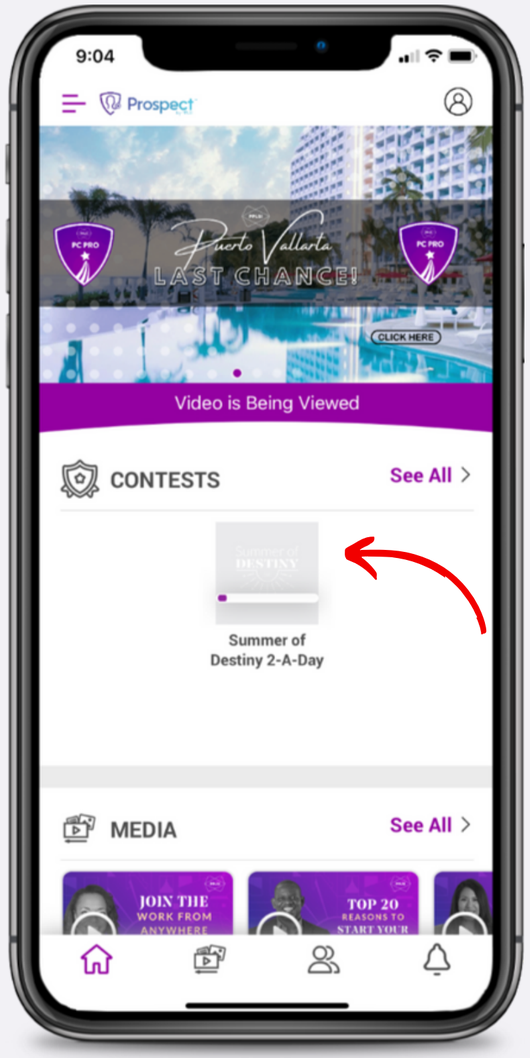


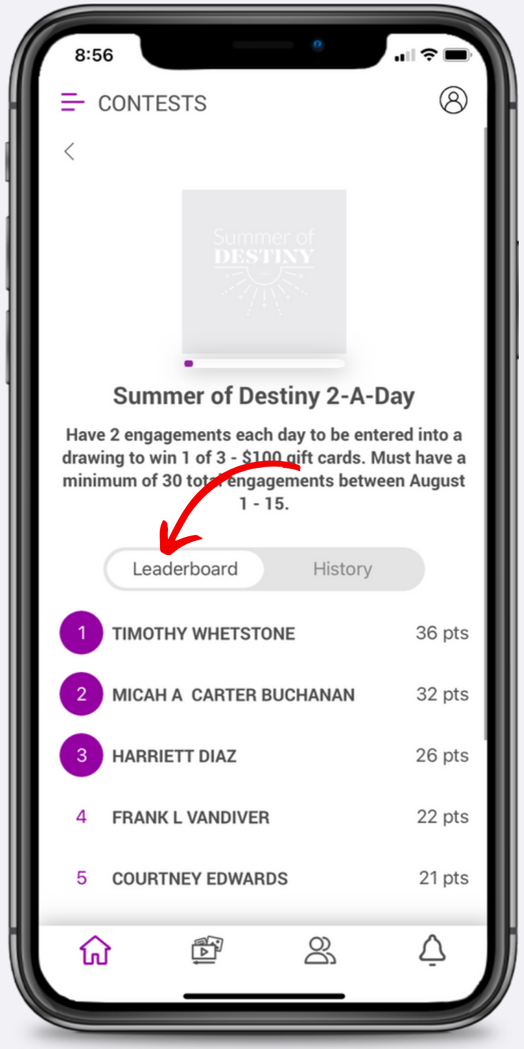
PPLSI
LegalShield/IDShield

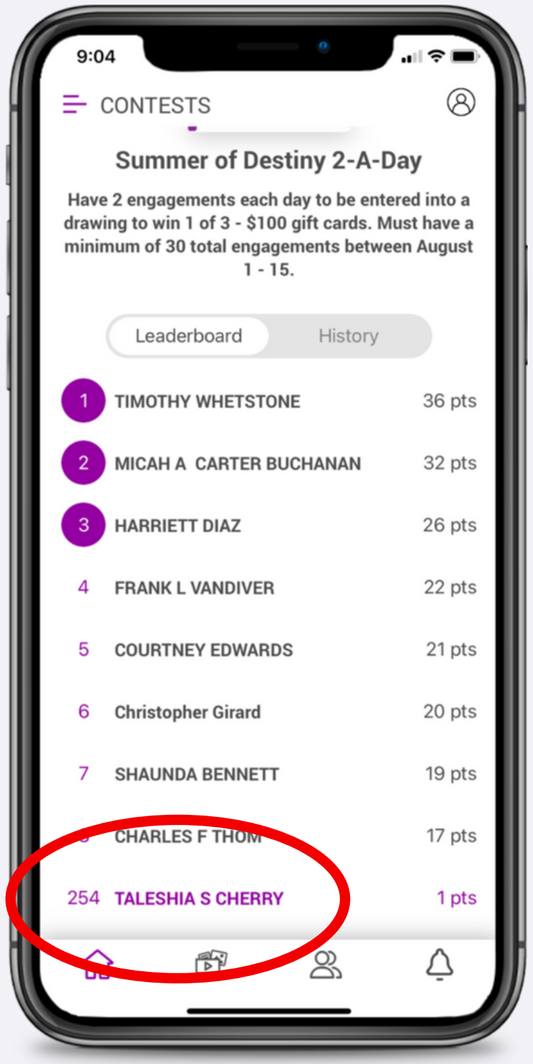

8:56
CONTESTS
Summer of DESTINY
Summer of Destiny 2-A-Day
Have 2 engagements each day to be entered into a drawing to win 1 of 3 - $100 gift cards. Must have a minimum of 30 total engagements between August 1 - 15.
Leaderboard
History
1 TIMOTHY WHETSTONE 36 pts
2 MICAH A CARTER BUCHANAN 32 pts
3 HARRIETT DIAZ 26 pts
4 FRANK L VANDIVER 22 pts
5 COURTNEY EDWARDS 21 pts

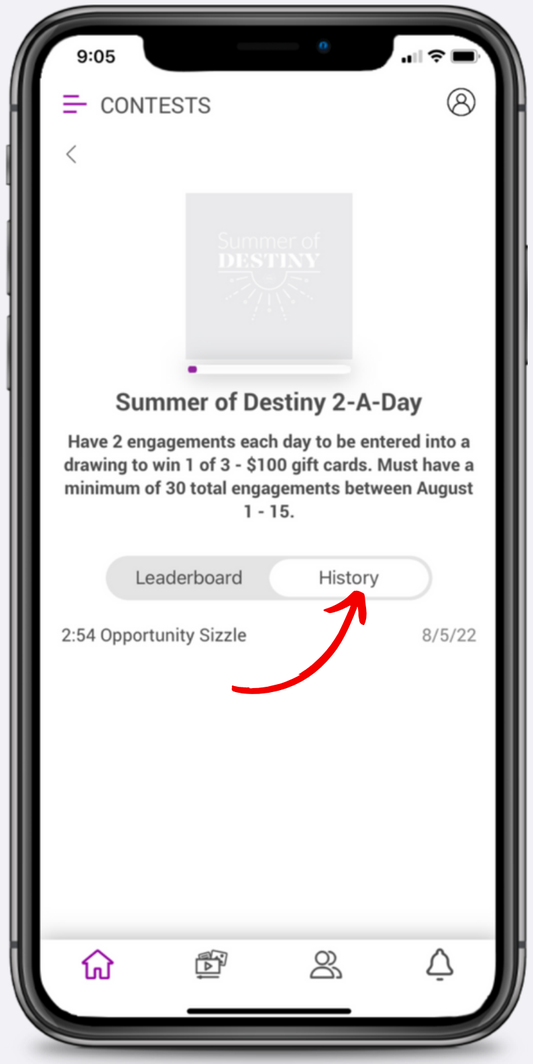
CONTESTS

How to Track Your Contest Progress

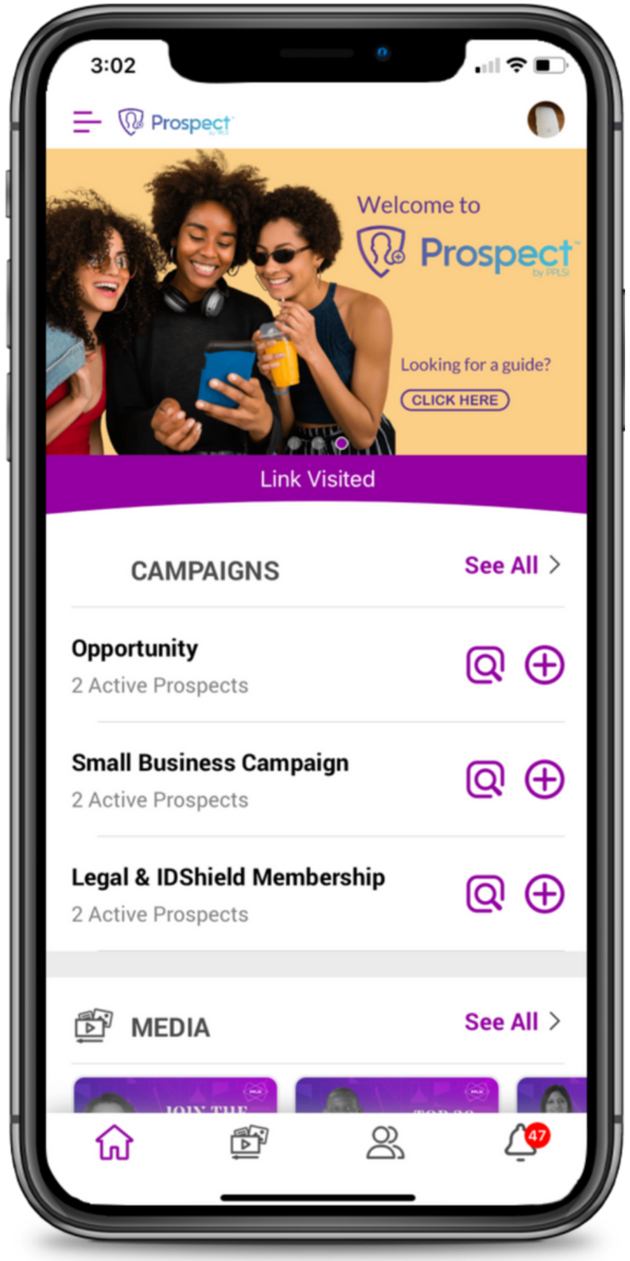






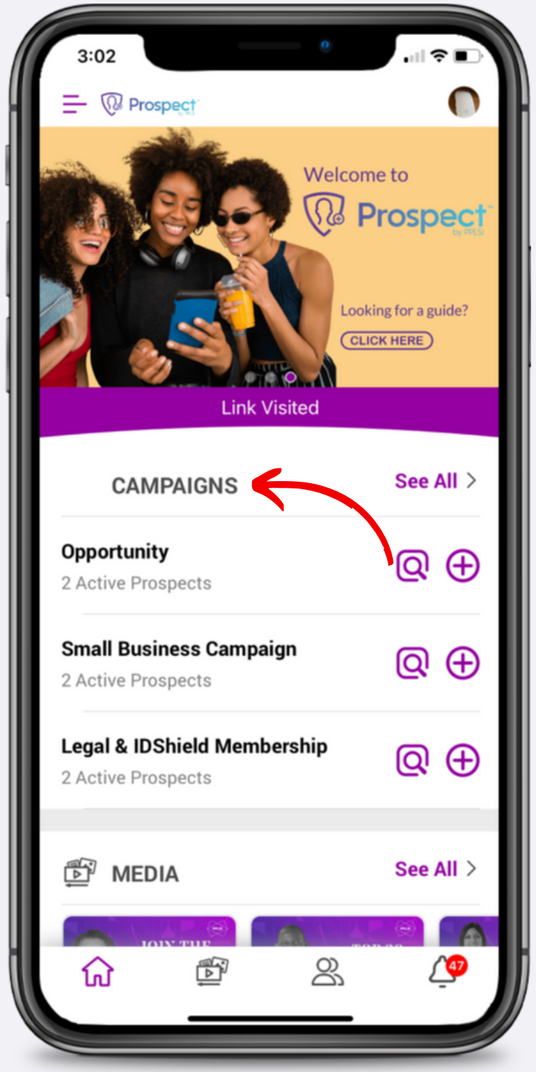


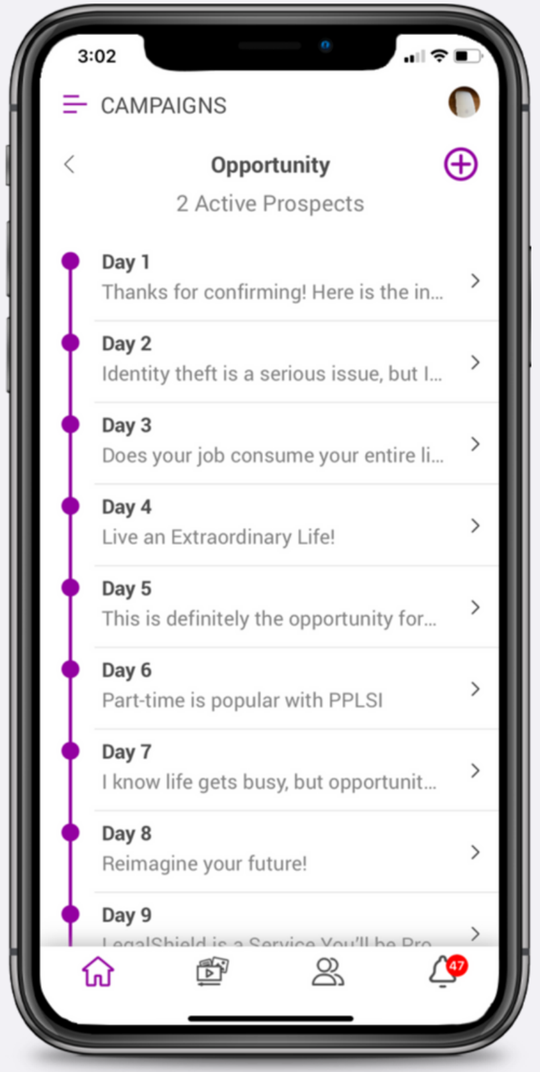
PPLSI
LegalShield/IDShield



EMAIL CAMPAIGNS

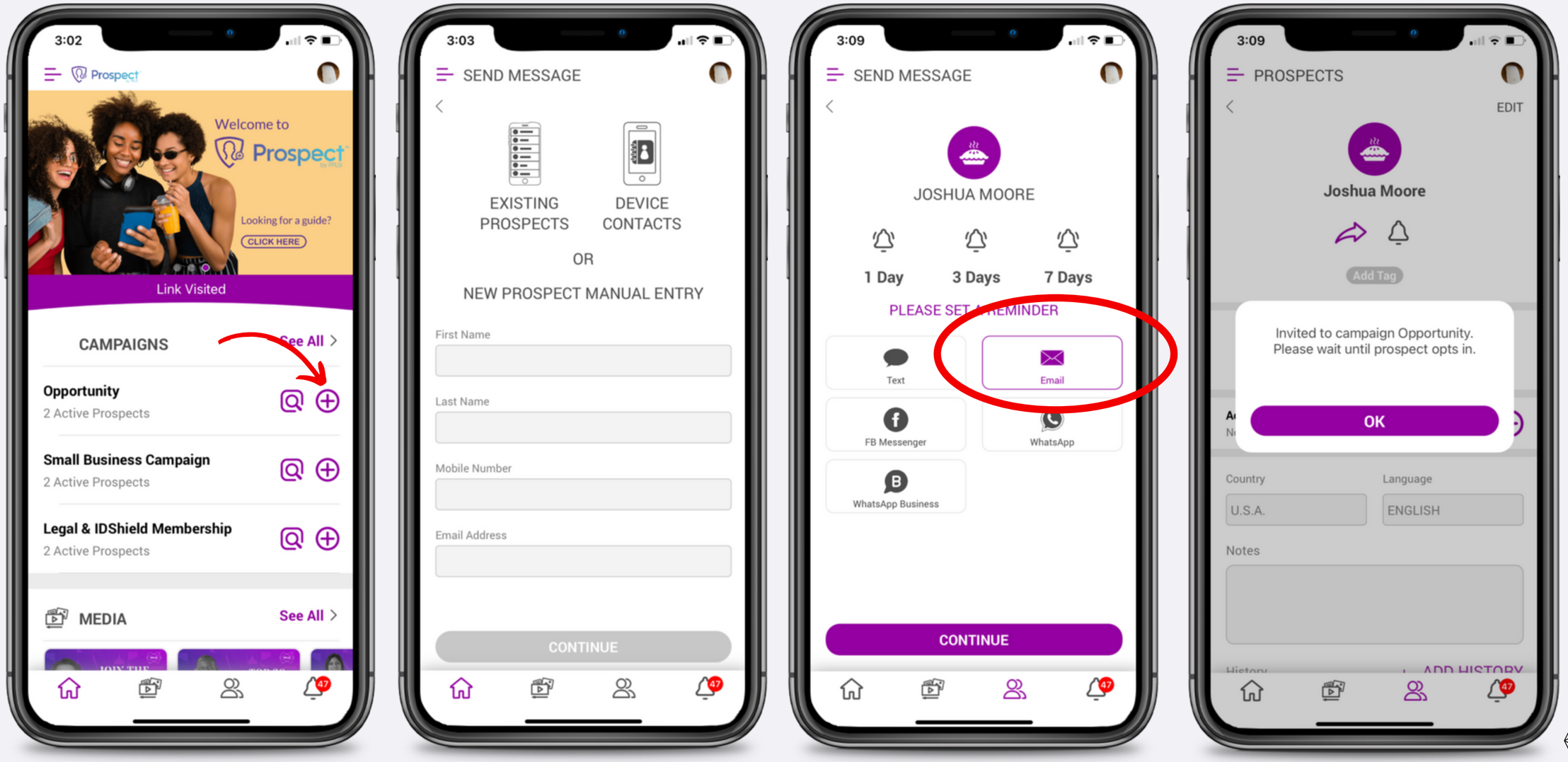
How to View Email Campaigns





PPLSI
LegalShield/IDShield

How to Add Contacts to Email Campaigns



PPLSI

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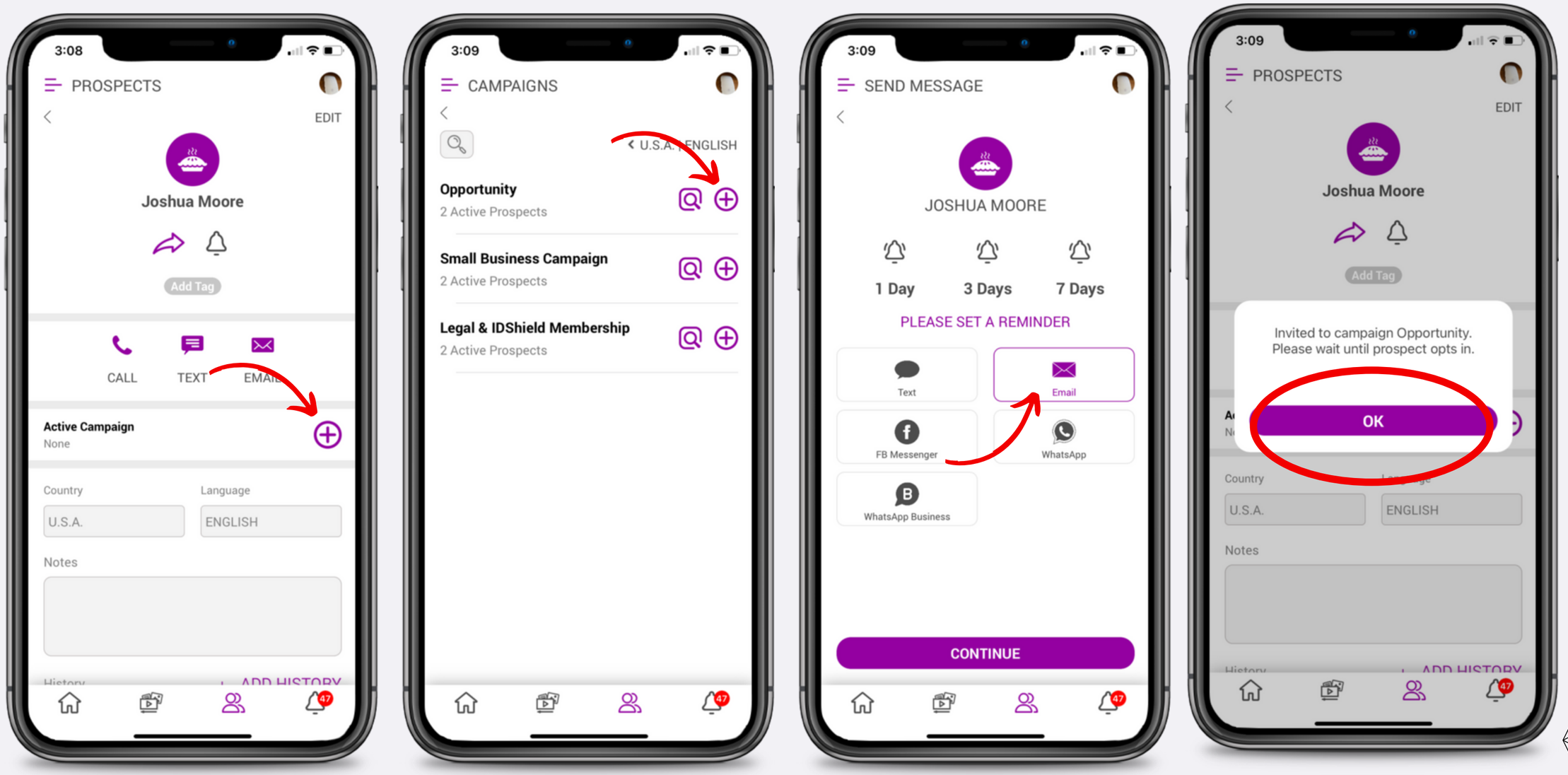
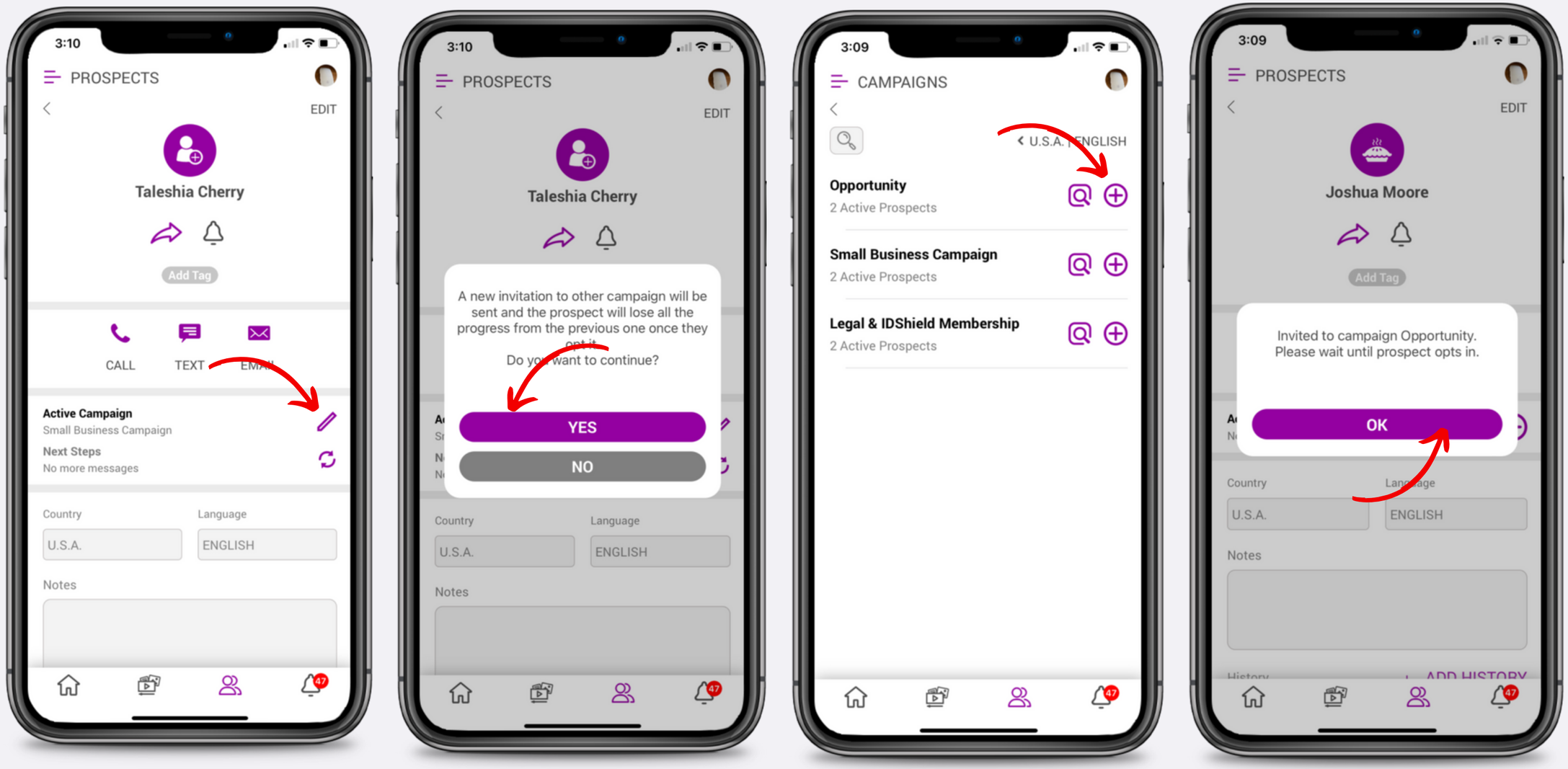
How to Modify/Remove Email Campaign