

ONBOARDING | Getting Started with Asset-Map

Welcome to Asset-Map! Your Success Coach will work with you to help get you up and running. You will have contact information for any questions regarding your onboarding.

We will share best-practices and tips to make this fast, easy and fun. Follow the steps below and get the most reward for your investment.

YOUR PLAN FOR SUCCESS

1

Get Started

- Login to Asset-Map Platform
- Customize Profile Information
- Upload Professional Photo
- Grant Delegate Access

2

Asset-Map with Clients

- Add 5 Households
- Apply a Stencil
- Print Asset-Map Report
- Share Asset-Map Report in Client Meeting

3

Asset-Map with Prospects

- Create a Stencil
- Apply Stencil to Household
- Share in Prospective Client Meeting
- Correct Client's Asset-Map

4

Share Funding Status

- Set Target-Map Preferences
- Build a Templated Target-Map
- Build a "Custom" Target-Map
- Print Comprehensive Report & Share with Clients

CONTACT YOUR SUCCESS COACH



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