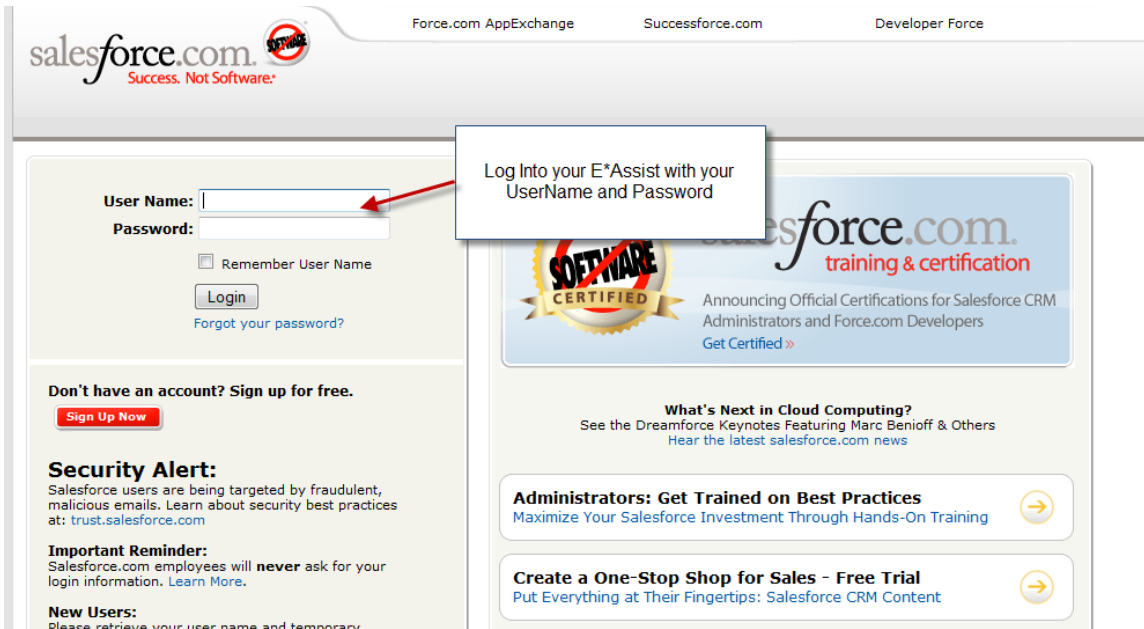
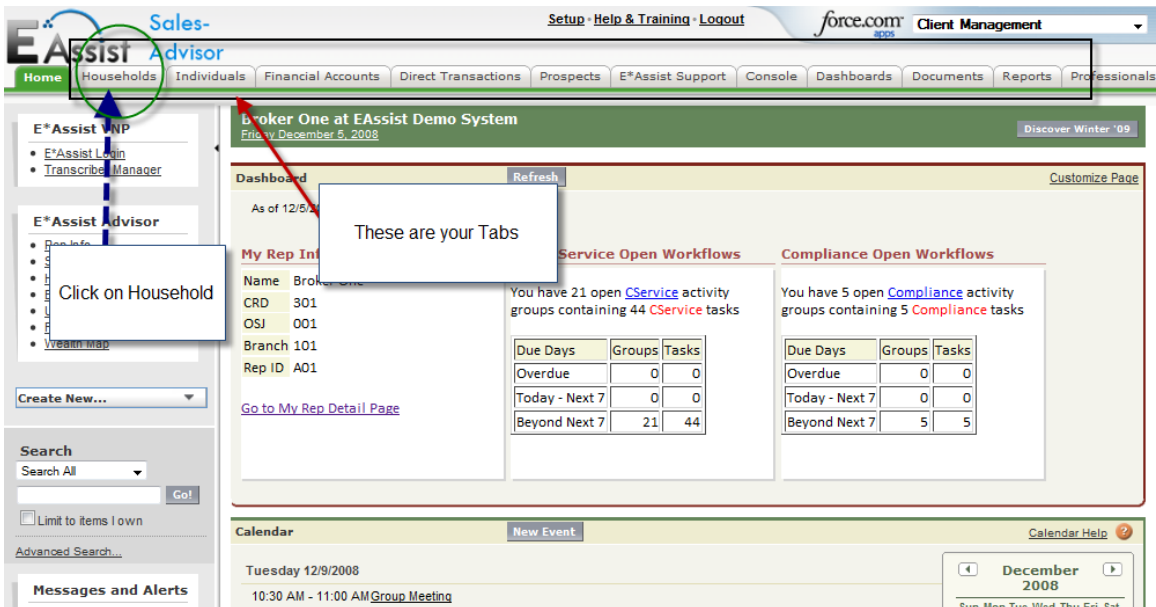


1. Enter your Username and Password to log in



2. Create your household



3. Select your desired Household

This is the Household Page

We will click on AGOGE INVESTMENT GROUP LLC to create our Prospect under this Household

Household Name	Current MV	HH Current Total	HH Rank
Doe Household		\$10,000.00	
Agoge Investment Group LLC		\$0.00	
Doe Household	\$10,000.00	\$10,000.00	
Anthony Tsung		\$0.00	
Google		\$0.00	
Farmer	\$1,366.74	\$350,546.05	64
Adams	\$1,565.96	\$46,356.67	94
California Leads		\$0.00	
Jones		\$0.00	
Smith	\$170,589.96	\$11,309,346.30	1
Fisichella	\$587,563.80	\$1,019,003.83	14
Polonen	\$14,446.32	\$560,921.82	37

4. Mouse over to Prospect and a submenu will appear. Click on New Prospect to create a new lead.

Scroll Mouse over to Prospect. A sub menu will appear. Press New

Prospect will be shown here

Action	Prospect Name	Relationship In The HH	Net Worth Range	Last Activity Date	Next Contact Date
<input type="checkbox"/>	John Doe				

5. This is the Prospect creation page. When done, press Save and this will then be created automatically

The screenshot shows the E*Assist Advisor interface for creating a new prospect. The page title is "Prospect Edit New Prospect". A blue dashed arrow points from a text box to the "Save" button, which is circled in green. Another text box points to the "Save" button with instructions. The form contains various fields for prospect information, including name, address, contact details, and financial data.

Annotations:

- Text Box 1:** "This is the Prospect creation page." (Points to the "Save" button)
- Text Box 2:** "Press **Save** when done to save work. This will then be automatically created within the E*Assist Platform. You will have now created a successful Prospect underneath the intended Household" (Points to the "Save" button)

Form Fields:

Field Name	Value / Options
Prospect Name	[Empty]
Salutation	[Empty]
Prospect Source	[Empty]
Street Address	[Empty]
City	[Empty]
State	[Empty]
Zip	[Empty]
Phone	[Empty]
Fax	[Empty]
Mobile	[Empty]
Best Time To Call	--None--
Email	[Empty]
Personal E-mail	[Empty]
Meeting Preference	--None--
Preferred Comm Method	--None--
Next Contact Date	[12/5/2008]
Expected Contact Freq	--None--
First Name	[Empty]
Last Name	[Empty]
Household	Agoge Investment Gro
Correspondent Salutation	[Empty]
Spouse Name	[Empty]
Relationship In The HH	--None--
Employer	[Empty]
Occupation	[Empty]
Net Worth Range	--None--
Income Avail To Invest	[Empty]
Bonus Avail To Invest	[Empty]
Income Potential	[Empty]
Status	Mailing Stage
Production Level	--None--