



Getting Started with LifeSite Pro

Engage clients on a multi-generational level by providing the secure digital tools they're familiar with.



Welcome to Your Dashboard

The screenshot shows the LifeSitePro dashboard interface. At the top, there's a navigation bar with the LifeSitePro logo, user profile for David Lane, and notification counts (2 messages, 26 notifications). A sidebar on the left contains a search bar (5) and a list of client names. The main content area is divided into several sections: a user profile for David Lane (3), an activity feed (2) with a 'Hello, David Lane' greeting and a 'View Notifications' button, a '126 Active Clients' summary (3) with a 'View Clients' button, a 'TIP OF THE DAY' section, and a 'CHECKLISTS' section (1) showing progress for 'Connected Care' (75%), 'Smart Home Systems' (63%), and 'Continuing Care Que...' (25%). Below the checklists is a 'MESSAGES' section (4) listing recent messages from Olivia Rogers, Josh Smiths, and Jacob Zazers. A 'View Messages' button is at the bottom of the messages section. A 'Help' button is located in the bottom left corner of the dashboard.

1. Life Checklists

Checklists help you first identify then save the files and information you'll need for all kinds of major life events.

2. Activity Feed

Up-to-date notifications allow you to proactively engage with clients by offering help and services when needed.

3. Client Directory

Add new clients and manage their contact information.

4. Message Center

Alert clients to important changes or action items with secure, real-time messages.

5. Client Access

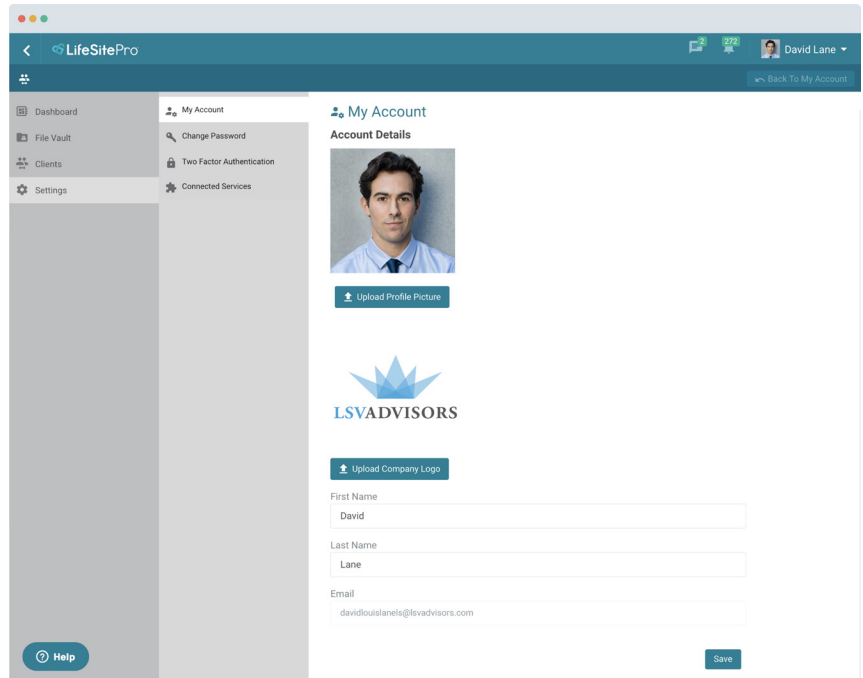
Switch to your clients to view and manage their files and information.



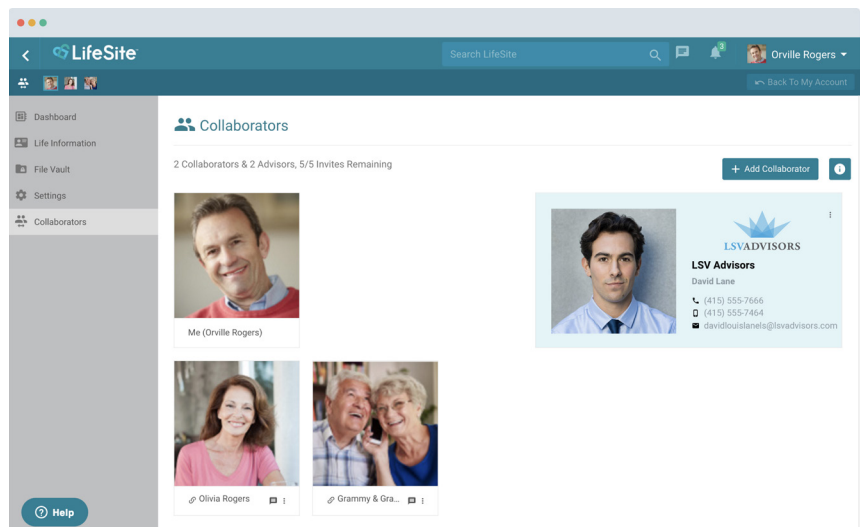
Upload Your Picture and Logo

Create Your Digital Business Card

Upload your profile picture and company logo to your LifeSite Pro account.



Your client will see your digital business card in their LifeSite Plus account.



Onboard Your Clients

Step 1: Introduce LifeSite

Call or email your clients ahead of time to let them know they'll be receiving a free invite to LifeSite Plus. If you're sending an email be sure to include the *Getting Started with LifeSite Plus* file.

Step 2: Invite Your Clients

1. You'll just need their name and email address.

New Client

Individual Multiple Add From .CSV

First Name

Last Name

Email

Mobile Phone Number

Favorite This Client

Submit

2. To invite multiple clients, first download the Sample Template.

New Client

Individual Multiple Add From .CSV

Import clients using LifeSite's .CSV template. Download a sample template

First Name	Last Name	Email Address

Upload from Computer

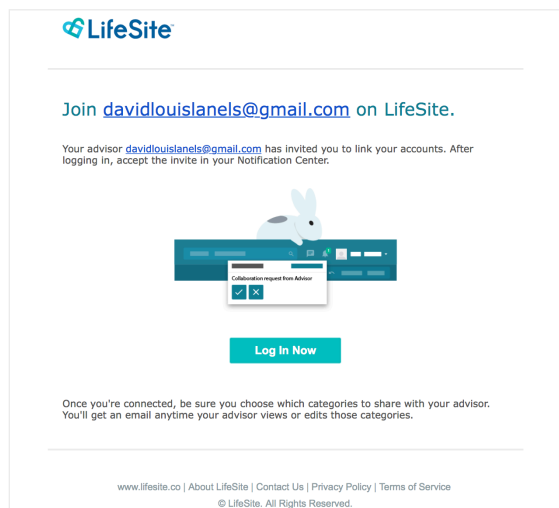
OR

Drag and Drop Files Here

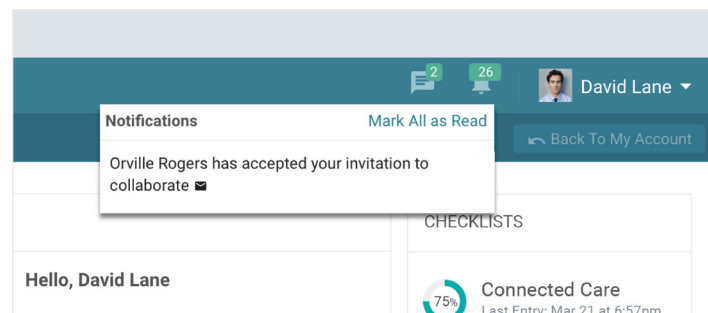
11 / 25 Client seats left

Cancel

3. Your clients will get an email invite to a free LifeSite Plus account.



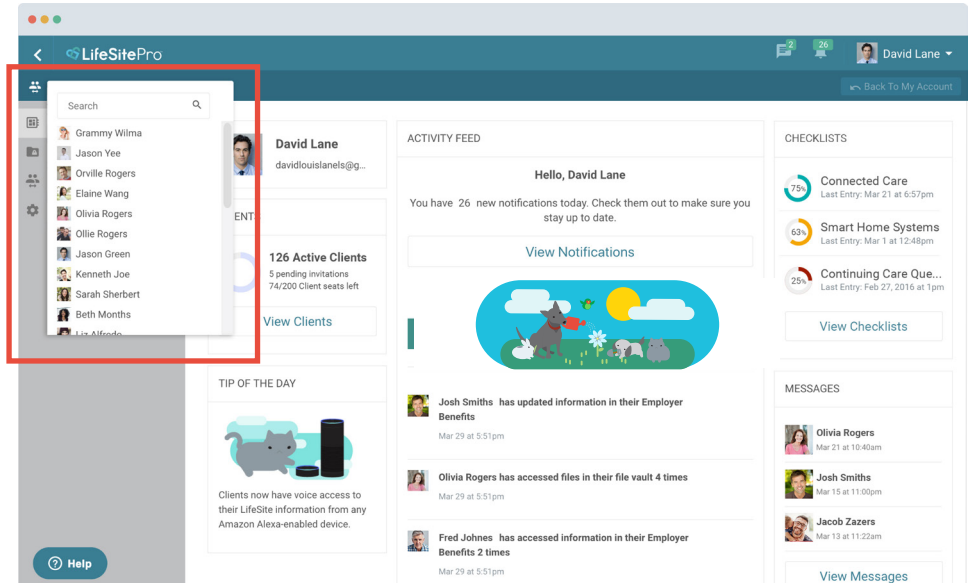
4. Once your client has accepted the invite, you'll get a notification.



Step 3: Start Collaborating

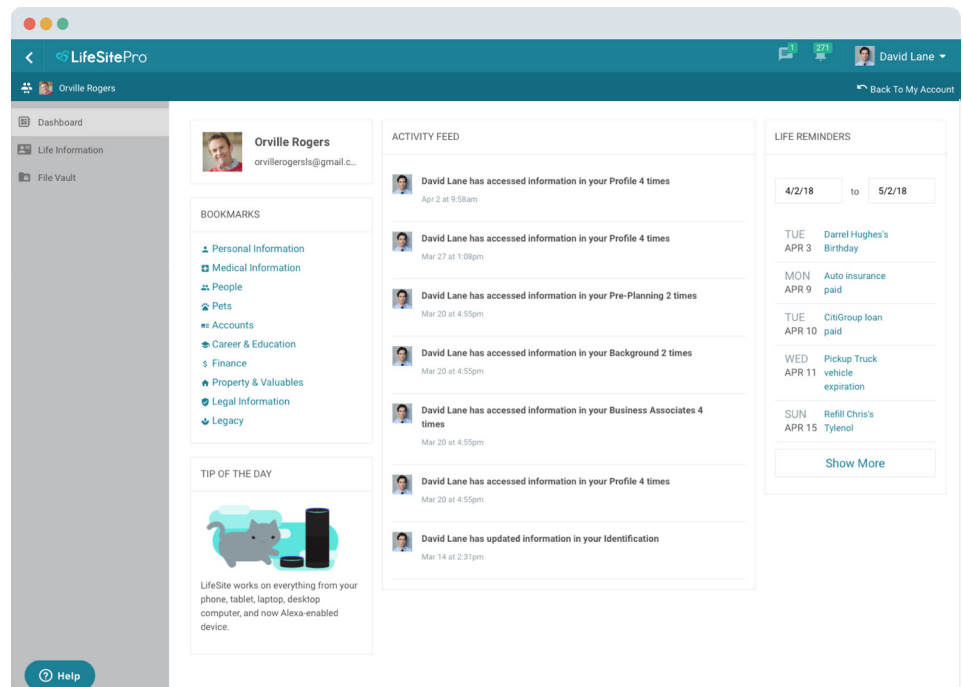
You now have access to some or all of your client's LifeSite Plus account.

Switch to your client to view and manage their files and information based on the permissions they set for you.



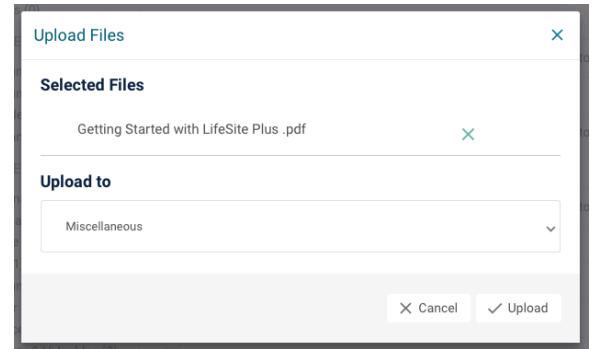
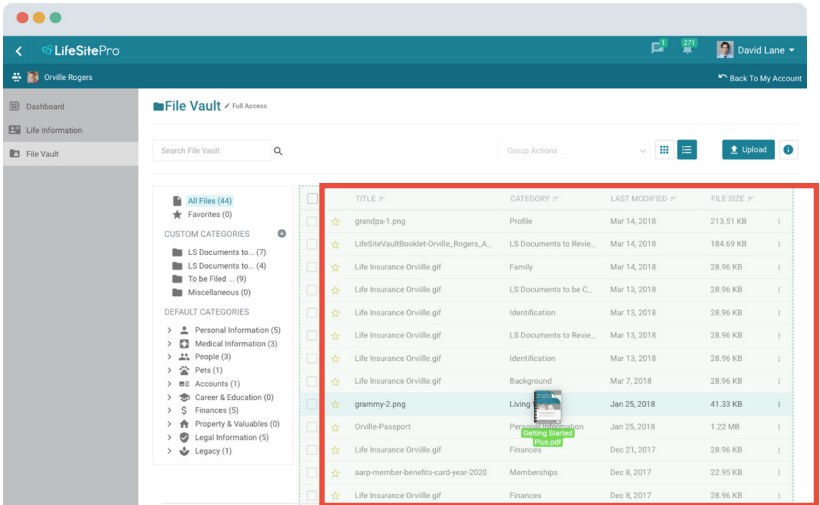
Step 4: Start Sharing

Based on your permissions, you can view or edit (or are blocked from) your client's files and information. Send your client a secure message if you require additional permissions.



Step 5: Upload File

Try it out! Save the *Getting Started with LifeSite Plus* file to your client's File Vault. Your client will get an email notifying them of this activity.



Step 6: Start Advising

You're all set! Send your client a secure message welcoming them to LifeSite along with the next steps you'd like them to take.

