LIFE APPOINTMENTS

Agent Welcome Guide

Everything you need to get started with your Life Appointments setters

lifeappointments.com

Life Appointments · November 2026

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Our appointment setters call your leads and book appointments for you. This guide shows how to sign in, what we need from you before your setters start, and what you'll see in the Setter Hub.

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How the service works

You buy a weekly package of setter hours, and trained appointment setters spend those hours calling your leads and booking appointments with you.

- **Your setters:** each agent is assigned one or more setters. They log into your lead system (your "funnel") with the login you give us, dial your leads, and book appointments.
- **Your appointments:** every appointment shows up on your dashboard with the lead's full details: contact information, mortgage, health, medications, and spouse information when the lead is married.
- **Your week:** weeks run **Saturday through Friday**. Your package hours renew each Saturday.
- **Your part:** tell us your leads each week, keep your funnel login and WhatsApp number up to date, and record what happened at each appointment. Your results tell the setter who needs a follow-up call.

Bookmark lifeappointments.com. It's your home base for everything: signing in to the Setter Hub, checking your appointments, and getting help.

About your setters

Our setters are highly trained, based in the Philippines, and overseen by a manager every day.

- **Matched to you:** we try to match you with the setter who will work best for you. Our setters are trained to work more than one account, so you get experienced help from day one.
- **Supervised, every shift:** setters are expected to be live with their camera on in the **SFG Appt. Setters** breakout room while they work.
- **Working hours:** setters generally work **10am to 7pm Eastern**, unless you ask for different hours.
- **Respectful calling:** setters are trained to check where each lead lives and only call during acceptable hours in the lead's time zone.

Tell us how your setter is doing

You have a place to give us feedback on your setters: the rating card for each setter on your **My Setters** page. Each week, rate them on each skill and add notes. Your feedback goes straight to Beverly, and she'll acknowledge it right away. It's how we keep the conversation going and pair you with the most qualified setter for you.

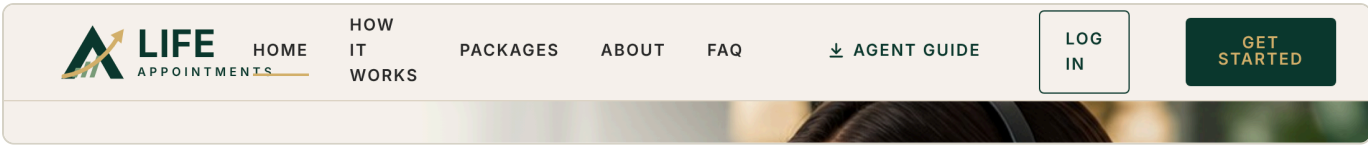
Bonuses and contests for your setters

Our setters work very hard to book you the best appointments they can, and we encourage you to reward them. If you'd like to give your setter a bonus or run a contest, contact Beverly and she'll handle the logistics for you. We want our setters to become part of our work family, and yours.

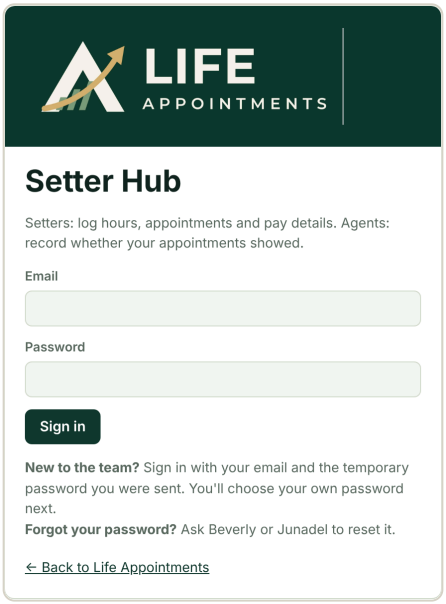
Step 1: Sign in for the first time

We create your login for you and send you your sign-in email and a temporary password. You choose your own password the first time you sign in.

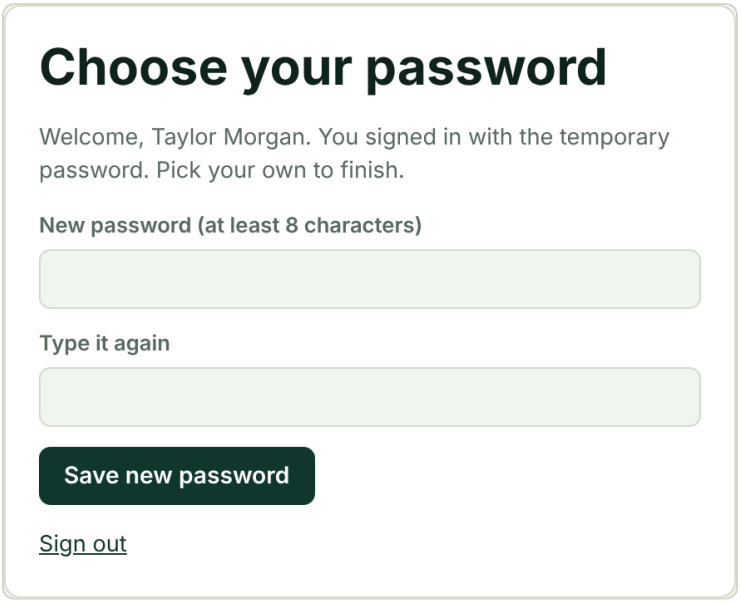
1. Go to **lifeappointments.com** and click **Log In** in the top menu.



2. Enter your email and the temporary password we sent you, then click **Sign in**.



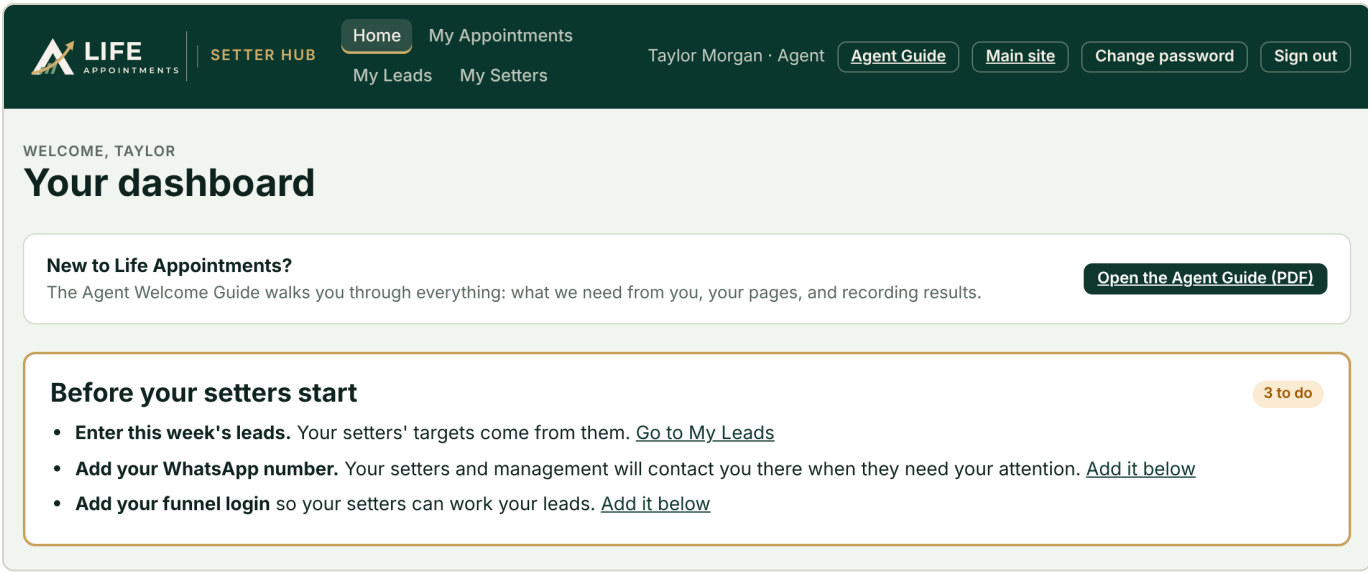
3. Choose your own password, type it twice, and save it. You'll use it every time you sign in from now on.



Forgot your password? Message Beverly or Junadel and we'll reset it to a temporary one.

Step 2: What we need from you

Your setters can't start dialing until the first three items are done. Your **Home** page lists anything still missing in a **Before your setters start** box, with a link to each one.



What	Where in the Setter Hub	When
Your WhatsApp number, with country code	Home, **Your WhatsApp**	Before you start, and if it changes
The login your setters use in your funnel (link, username, password)	Home, **Funnel login for your setters**	Before you start, and whenever you change the password
How many leads of each type you have this week	My Leads	Once a week, when the week starts
What happened at each appointment	My Appointments	After every appointment

Why WhatsApp: if one of your setters or a member of our management team needs your attention, we'll contact you on WhatsApp.

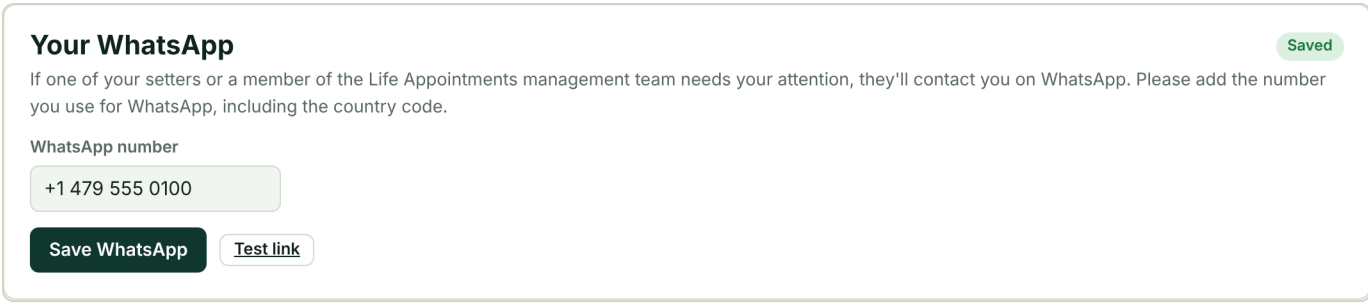
Your funnel login is protected: only the setters assigned to you, Beverly and Junadel can see it. Please don't use a password you use anywhere else.

Step 3: Your dashboard, page by page

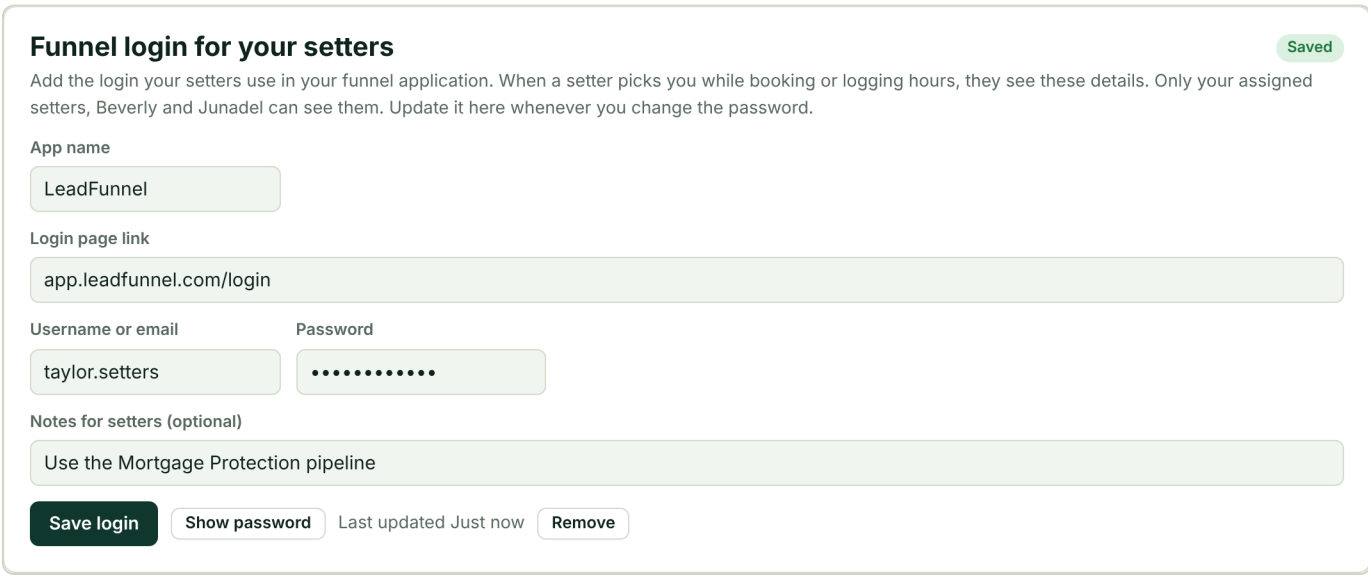
You have four pages: **Home**, **My Appointments**, **My Leads** and **My Setters**. The screenshots below use sample names.

Home: reminders, your WhatsApp and funnel login

Your Home page is your dashboard: reminders, today's appointments and whether your setter confirmed them, and your appointment target. Near the bottom, add your WhatsApp number and click **Save WhatsApp**. Click **Test link** to check it opens WhatsApp.



Then add the login your setters use in your funnel: the app's name, its login page, the username and the password. Add a note if setters should use a certain pipeline or list. Click **Save login**. Come back here whenever you change that password.



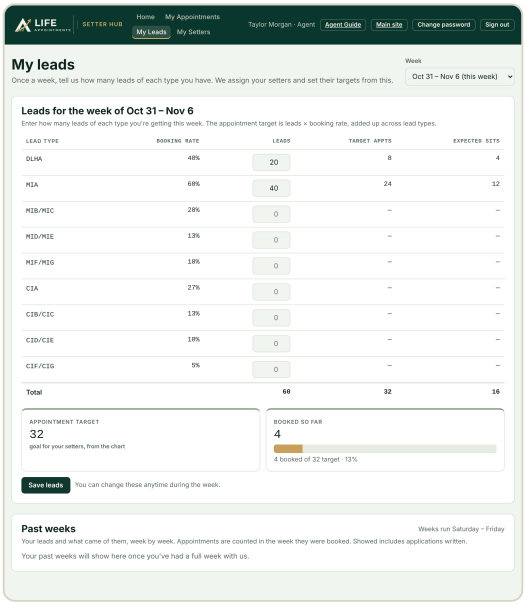
My Setters: rate your setters each week

Each setter assigned to you has a card. Once a week, rate them 1 to 5 stars on each item, add your notes and click **Save this week's rating**. You can update it until the week ends Friday, and your past weeks are listed below it. Your ratings and notes go straight to Beverly, who acknowledges them right away and uses them to pair you with the right setter.

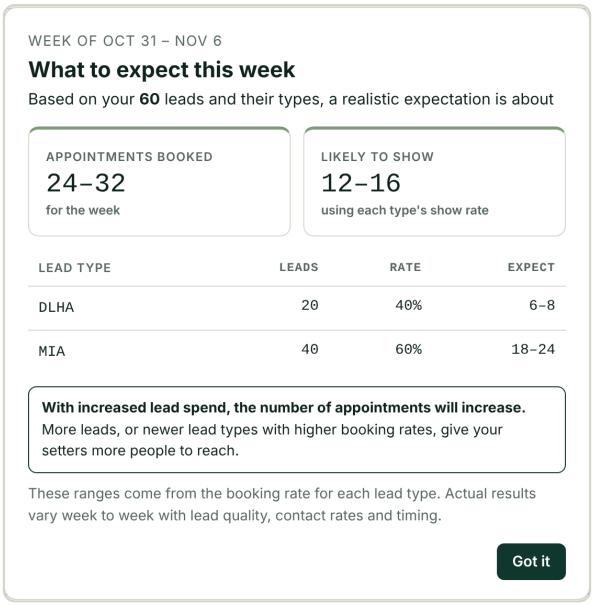


My Leads: your leads for the week

Once a week, enter how many leads of each type you have and click **Save leads**. Each new week starts filled in with last week's numbers, so if nothing changed, just click **Same as last week**. That's all you need to do here. We assign your setters and choose which lead types each one calls.

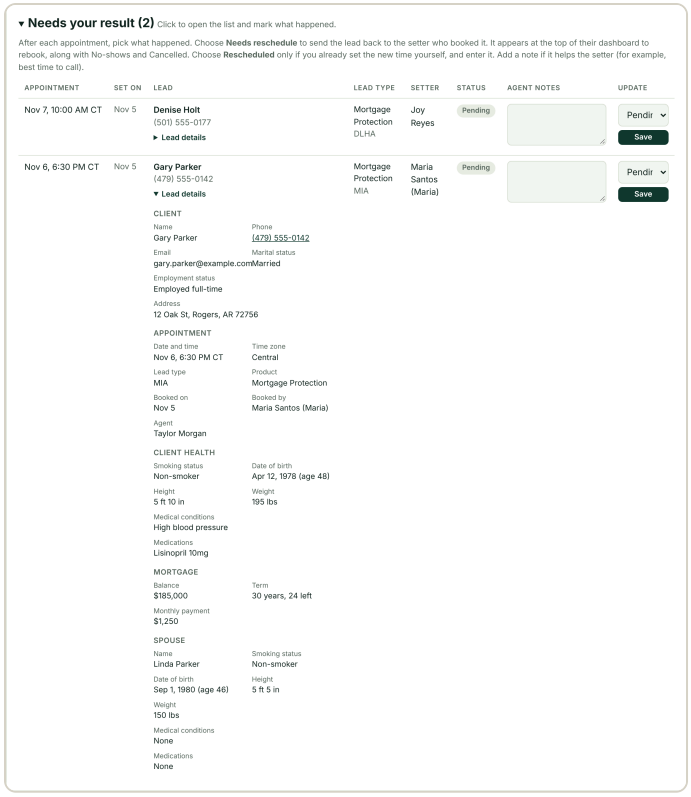


When you save, a **What to expect this week** window shows a realistic range of appointments for your lead mix, based on the booking rate for each lead type. Newer lead types book far more often than older ones, so a week of mostly older leads will bring fewer appointments. With increased lead spend, the number of appointments will increase.

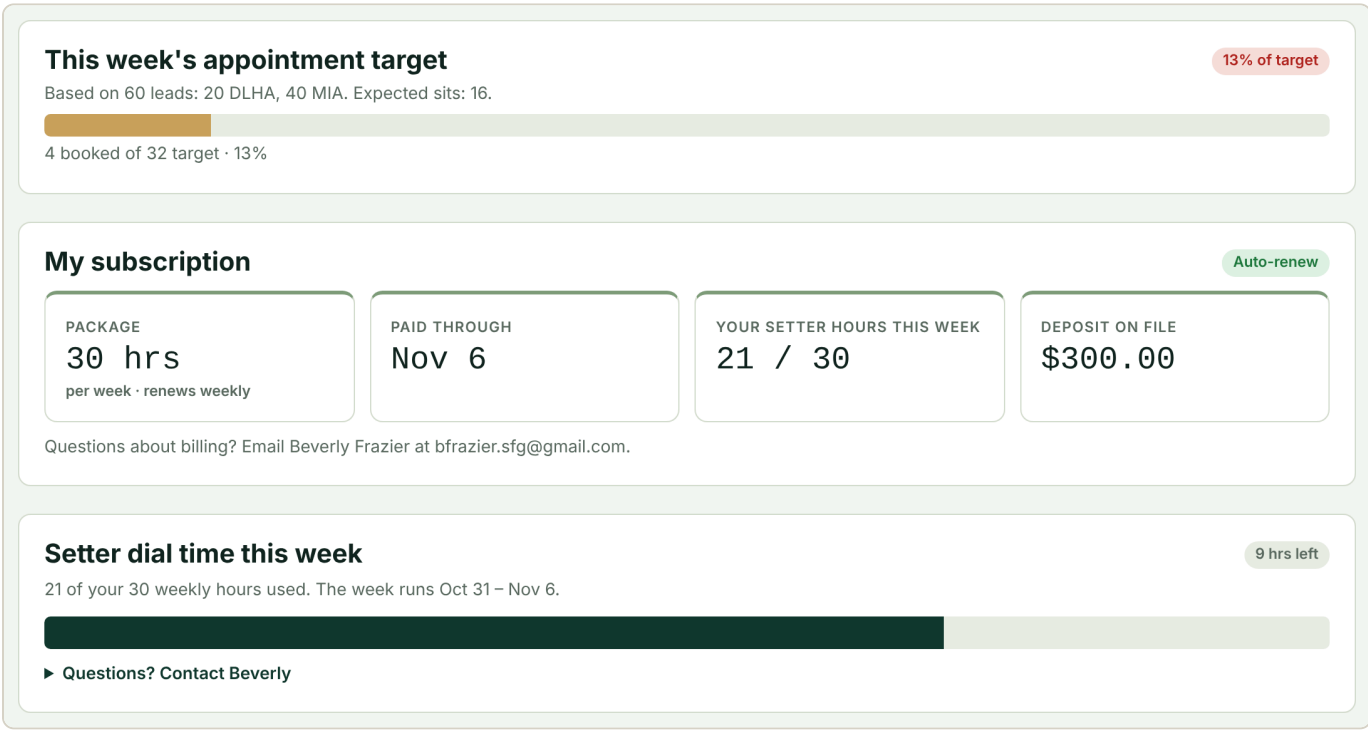


My Appointments: your week at a glance

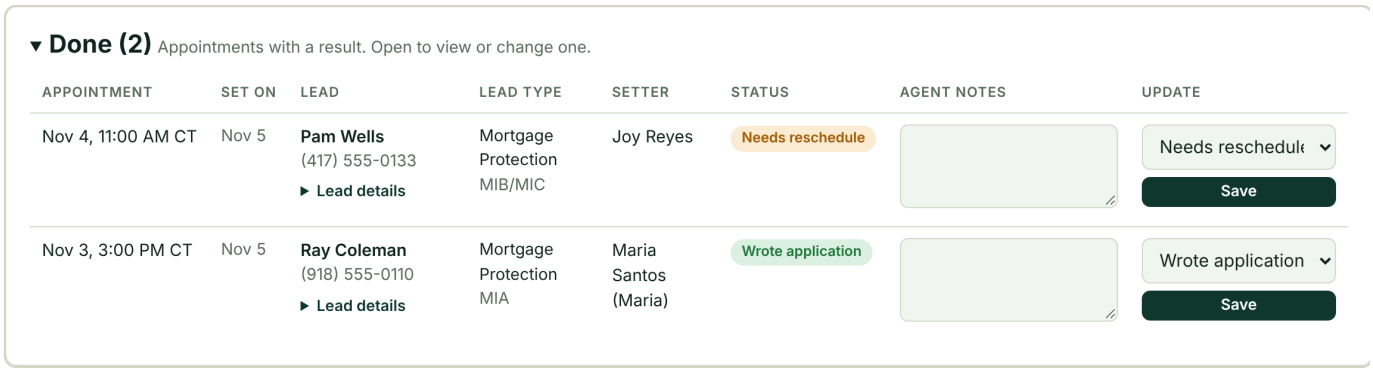
The top of this page is **Needs your result**: every appointment your setters booked for you that still needs to be marked. Click it to open the list, then click **Lead details** to see everything the setter collected: contact information, address, smoking status, date of birth, height and weight, medical conditions, medications and mortgage details. For married leads, you'll also see the spouse's details.



Below that are your appointment target, your subscription and your setter hours for the week.



Appointments you've recorded a result for move to **Done** at the bottom. Click **Done** to open the list when you need it.



Step 4: After each appointment, record what happened

On **My Appointments**, choose a result in the **Update** column, add a note if it helps, and click **Save**. Please do this the same day. Your setters use your results to follow up, and their pay depends on them.

Result	Choose it when	What happens next
Showed - no sale	The lead kept the appointment but didn't buy	Counts as a show for your setter
Wrote application	You wrote business	Counts as a show for your setter
Rescheduled (I set the new time)	You moved the appointment yourself	Enter the new date and time. The setter sees it.
Needs reschedule (send back to setter)	The lead needs a new time and you want the setter to set it	Goes to the top of the setter's dashboard to rebook
No-show	The lead didn't show	Goes to the setter to call and rebook
Cancelled	The lead cancelled	Goes to the setter to see if they'll rebook

Notes help: "Wife wasn't home, call after 5pm their time" tells the setter exactly how to rebook.

Your package and weekly hours

Your package is a set number of setter hours each week, for example 30 hours. It's billed through Stripe with a deposit, and it renews automatically every Saturday unless you tell us otherwise.

- **What counts against your hours:** only time a setter spends dialing your leads and setting appointments for you. A new setter's first week of training, including practice on your leads, is never charged to you. In their second week of training they dial and book for you, so those dialing hours count toward your package like any other setter's.
- **Half packages:** a 15-hour half package works the same way, with a weekly limit of 15 hours.
- **When your hours are used up:** your My Appointments page shows a notice that you've received your allotted time for the week. Your setters start calling for you again on Saturday.
- **Your subscription box** on My Appointments shows your package, the week you're paid through, your setter hours this week and your deposit on file.

Questions? Here's how to reach us

Beverly Frazier, Director of Operations, handles your account, billing and any questions.

- **In the Setter Hub:** open **Questions? Contact Beverly** at the bottom of your Home page, type your message and click **Send message**.
- **Book a call:** schedule a time with Beverly.
- **Email:** bfrazier.sfg@gmail.com

Welcome aboard. We're glad to be setting appointments for you.