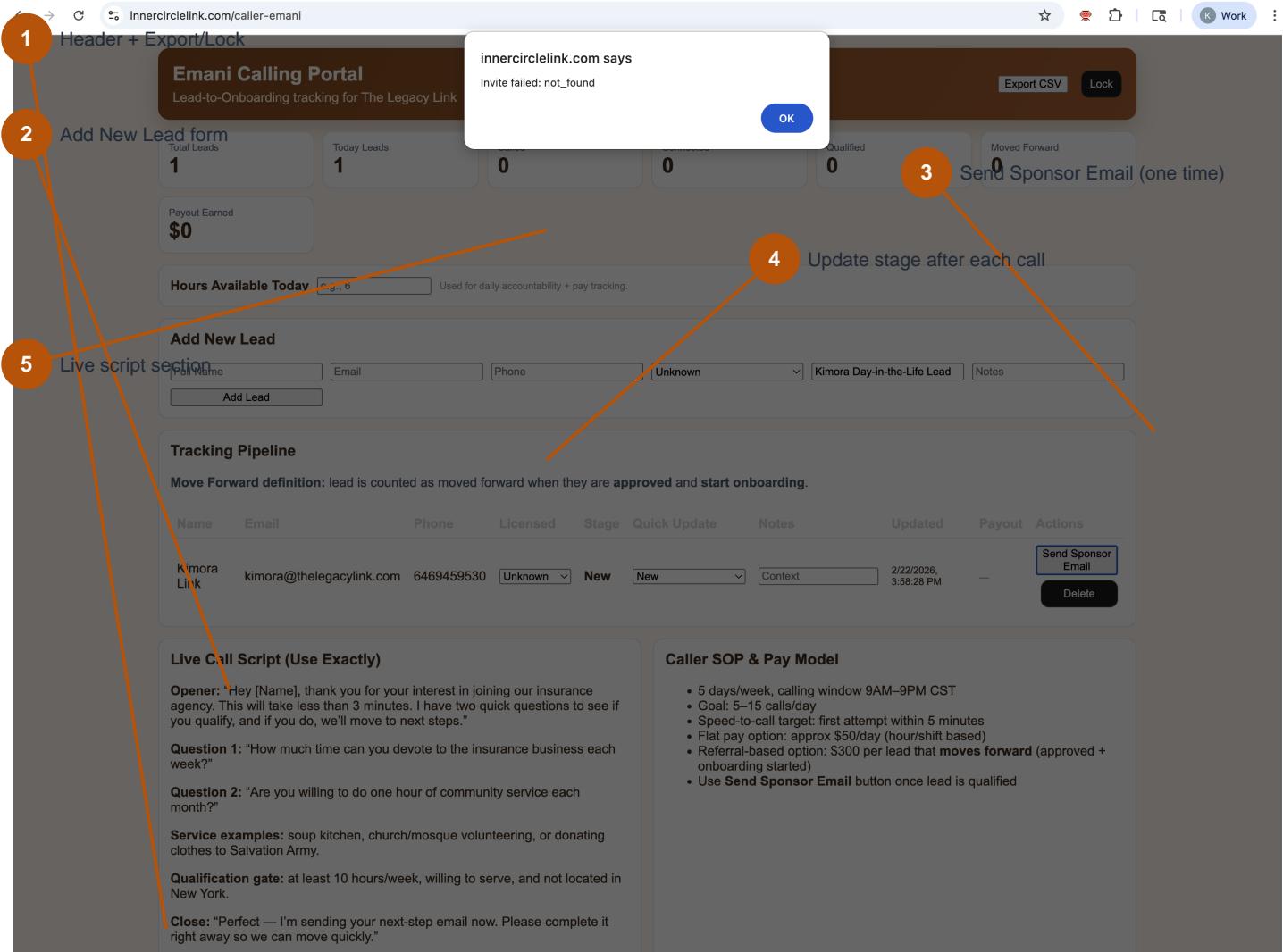


Emani Calling Portal — Quick Start Guide

Use this as your 2-minute walkthrough. Follow steps in order.



5-Step Workflow

- 1) Open portal and review New leads.
- 2) Call immediately and set Licensed/Unlicensed.
- 3) Move stage: Called → Connected → Qualified.
- 4) Click Send Sponsor Email ONCE (button turns to Email Sent).
- 5) If row shows Approved • Stop Calling, do not continue follow-up.

Definitions + Tracking

- Moved Forward = Approved + Onboarding Started.
- Payout badge +\$300 appears when name matches approved policy list and onboarding is started.
- Log Hours Available Today at the start of each shift.
- If a lead is approved, row turns green and should be removed from call cycle.

Daily Success Checklist

- [] Start shift and set Hours Available Today
- [] Work all New leads first
- [] Keep notes short + clear
- [] Send sponsor email only for qualified leads
- [] End shift with stage updates completed