

Legacy Shield Beacon Revisions

NOTE : Company owners will have All tabs an agent has plus an additional 2 tabs lead designation. Agency tree

Agent Login CANT CUSTOMIZE ANYTHING JUST VIEWING ONLY. This goes for every tab

Section 1

Dashboard tab

Top left graph will be company dials over the last 7 days

Top right graph will be company alp over the last 7 days

Instead of operational directive it will be company owners name and Quote company owner chooses

Get rid of system core broadcast thing under quote

Get rid of analytics hub and system audit on the bottom right for agent

Company owner can change quote and name

Section 2

Announcements Tab

Will look like google slides with an option to click to the next slide underneath the slides. Will also be able to put videos on slides and also links to videos. It will act like a google slide will be able to change background and so forth. Company owner only able to edit.

(Basically able to view inserted google slide)

Section 3

Contacts

The screenshot shows the Prodigy Life Group LLC CRM software interface. The left sidebar includes options like Launchpad, Dashboard, Conversations, Calendars, and Contacts (which is highlighted). The main content area displays a list of contacts with columns for Name, Phone, Email, Created, Last Activity, and Tags. There are four contacts listed:

Name	Phone	Email	Created	Last Activity	Tags
Mario Marin	(562) 825-6254		Nov 03 2025 05:42 PM (PST)		
Gabriel Angel	(909) 818-2599	unk2@gmail.com	Oct 13 2025 10:37 AM (PDT)	2 months ago	
Maria Areli	(760) 265-2591	unkk@gmail.com	Aug 18 2025 11:16 AM (PDT)		
Maria Areli	(909) 432-4000	unk@gmail.com	Aug 15 2025 01:25 AM (PDT)		

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Prodigy LIFE GROUP

Prodigy SOLD Clients

Launchpad

Dashboard

Conversations

Contacts

Reputation

Reporting

Mobile App

Settings

Add Contact

Contact Image

First Name *

Last Name

Email Please enter email address [Add Email](#)

Phone Select [Enter phone number](#) [Add Phone](#)

Contact Type

Time zone

DND All Channels OR

Channels Email Text Messages Calls & Voicemail Inbound Calls and SMS

[Save and Add Another](#) [Cancel](#) [Save](#)

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I want to make it to where the company owner controls all the tabs on the left side. I want them to make as much or as little client info. They will also customize all answers to their liking. They can make all filters for client and on side menu. I want it to look exactly like the video.

https://drive.google.com/drive/folders/18VL9eEaMCOcl6zQTBNWvfZ5Bj6F2YR8u?usp=drive_link

Section 4

Conversations

Conversations tab is meant for if clients send a text message back to you or try to call you or leave you a voicemail so you can reach back out to them. It will help you keep track of your clients if they reach back out. It will also show if you previously called them before so you can keep track or call

attempts and such. Data will be shared from the dialer as well so if they were called by the dialer it will show on there.

https://drive.google.com/drive/folders/18VL9eEaMCOcl6zQTBNWvfZ5Bj6F2YR8u?usp=drive_link

Section 5

Pain Tracker

Keep everything the same just have it to where company owners can add as many trackers (FILTERS) as they want. Some companies need more than others. Company owners will be able to add the trackers. Supervisors will be adding the client information for agents to solve. But supervisors will not be able to add or take away trackers. (Trackers like Threat level, last intercept)

Section 6

Personal Tracker

Its perfect!!!!

Only thing i want to change are things being tracked

Top left Average daily Dials

Top 2nd tab Retention percentage

Top 3rd tab Lead vs referral ratio

Top right tab sales per 100 new leads

Bottom left graph will be alp from the last month. When clicked on will be able to view individual months and also be able to view year to date alp from sales. Will be able to see all history of alp

Bottom right graph views dial history like alp graph

Section 7

Company Arena

It's perfect!!!!
Love the format

Add weekly and Yearly filter.

Have it to only track only one thing chosen. Those options will be alp, dails, retention, Lead vs referral ratio, profitability.

Dont remove anything from this tab its perfect just add the filters

SECTION 8

Company help tab

Get rid of contact support and just add helpful links. If they need help they will know to already contact their supervisors

Make it to where only company owners can edit it

AUTO DAILER

Section 9
Beacon

(Will be a pop-up not a tab)

Tabs there will be

Announcements

Will look like google slides with an option to click to the next slide underneath the slides.

This will lead to related announcements and or changes related to calling and stuff. Will be exactly like the announcements tab on other announcements tab.

Beacon

This is the actual auto dialer

Live calls

Erik will make this one (basically shrink it down and add multiples in a grid form to avoid doom scrolling) also go based of conversations

Call Logs

Advance filtering search

Company help tab

Same as other company help tab just related to calling sales and stuff