



## Tips for Getting Started

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**1. Click on "Mailing Program" and you'll be on the Home page. This page has the following information.**

If we have uploaded your clients (any applications submitted) for you they will be located in a square in the middle of the page. Click "Add Contacts" and you can choose ones to add to your mailing.

The color chart displays your mailing potential and estimated cost.

Links to all of KIT letters for you to review (Library) 3-Touch letters: 90 Day, Birthday, Annual Review Monthly letters

Custom letters

Subscription: The 3-Touch will be automatically mailed to your clients. This is where you make the selection to mail monthly letters to your clients, friends and family, and prospects. For the greatest KIT impact you would choose to subscribe.

Downloads

Prices for mailing in KIT

Signature scanning form

How to find 100+ contacts today

Template (Excel) for importing contacts

**2. Click on "My Profile" under the Mailing Program to customize your KIT mailings.**

Upload your picture

Print out form for your signature to be added to your letter and mail it to Pam King (if you didn't submit one at convention).

Option to use Introduction letter

Option to have your clients automatically added to your KIT list

Display License Number (only CA)

Business Information (all this info will be on your letter)

**3. Click on "Contacts" under the Mailing Program to manage your contacts.**

+ Add Contacts (Friends, Family, Prospects, etc.)

Upload Contacts

Export Contacts (Excel)

Edit

Delete

**4. Click on "Account" under the Mailing Program. This is where you fund your account and establish your auto draw. A good idea to keep your account active and mailing. About \$25 for 50 clients, or \$50 for 100 clients.**

Click on "\$ Fund Account"

Credit / Debit Card only

Enter \$ amount press continue

Complete all of the fields

Auto draft settings are at the end of the page be sure to press continue

You must press "Confirm Transaction"