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Customer Portal Overview

Customer Portals provide a place for agents to login, access, and download listing media as well as place new orders with photographers directly in the account dashboard. Inside the customer portal you will see listings delivered to you by Snap2Close, order history and appointments information, leads collected from contact forms on property websites, access and create marketing materials, and so much more!

Listings

The Listings section is where you can review all of the listings Snap2Close has historically shared with you, the most recent being the first property card. Click into any listing card to view the contents inside and/or download the listing media, access your Property Website and Marketing Materials editor.

The screenshot shows the Snap2Close Customer Portal interface. At the top, a dark header bar contains the user's name 'Charlie Taylor' on the left, a search bar in the center, and a user profile icon on the right. Below the header, a left sidebar lists navigation options: 'Place Order' (a prominent blue button), 'Credit Balance: \$0.00', 'Dashboard', 'GENERAL' (with 'Listings' selected), 'Orders', 'LEADS + MARKETING' (with 'Leads' selected), and 'MORE' (with 'App Store', 'Team', and 'Settings' listed). The main content area is titled 'Listings' and features a search bar, a 'Listing Status' dropdown set to 'All Statuses', and a 'Results per page' dropdown set to '12 per page'. Below these filters are two buttons: 'Search Listings' and 'Reset Filters'. The listings are displayed in a grid of six cards. Each card shows a property image, the address, city, and state, the agent's name 'Charlie Taylor', and an order status. The first four cards have a status of 'Paid' (green text), while the last two have 'Partially Paid' (yellow text). The listings are: 9634 E Camino Del Santo, Scottsdale, AZ 85260; 5519 N 19th Dr, Phoenix, AZ 85015; 3212 N Miller Rd, Scottsdale, AZ 85251; 4153 S Tigre Del Mar Dr, Gold Canyon, AZ 85118; 9616 E Camino Del Santo, Scottsdale, AZ 85260; and 9609 E Camino Del Santo, Scottsdale, AZ 85260.

Address	City, State, Zip	Order Status
9634 E Camino Del Santo	Scottsdale, AZ 85260	Paid
5519 N 19th Dr	Phoenix, AZ 85015	Paid
3212 N Miller Rd	Scottsdale, AZ 85251	Paid
4153 S Tigre Del Mar Dr	Gold Canyon, AZ 85118	Paid
9616 E Camino Del Santo	Scottsdale, AZ 85260	Partially Paid
9609 E Camino Del Santo	Scottsdale, AZ 85260	Partially Paid

Listing Card Details

Your Listing Card Details screen allows you to manage your visual media and information that will appear on your listing's Property Websites and Marketing Material.

4153 S Tigre Del Mar Dr

Gold Canyon, AZ 85118

Download

Charlie Taylor

QUICK ACTIONS

Update Address @

Video Builder 📺

SECTIONS

Property Details

Images

Videos

Floorplans

3D Content

Files

Order #1032

Property Websites

Marketing Materials

Rearrange

Add

▼

Add

▼

Rearrange

Add

▼

Add

▼

Add

▼

\$0.00

View

▼

Domains

View

Editor

▼

Create

▼

Please review our video tutorial on [The Dashboard, Orders and Listings](#) to learn more using the Listing Card Details.

Our Acrobat pdf file titled “Listing Card Details” also contains more detailed information about the functionality and uses of your Card’s Details.

Orders

The Orders section is where you can review all of the order history information with Snap2Close. Click into any order to view details, complete payments, download invoices, and review or update appointment information.

The screenshot displays the 'Orders' section of the Snap2Close interface. The top navigation bar includes the user's name 'Charlie Taylor' and a search bar. The left sidebar lists various navigation options: 'Place Order' (highlighted), 'Credit Balance: \$0.00', 'Dashboard', 'GENERAL' (Listings, Orders), 'LEADS + MARKETING' (Leads), and 'MORE' (App Store, Team, Settings). The main content area is titled 'Orders' and features a search bar, filters for 'Fulfillment Status' and 'Payment Status', and a 'Search Orders' button. Below the filters is a table of orders:

NUMBER	ADDRESS	TOTAL	STATUS	APPOINTMENTS
1051 Placed Feb 13th	3212 N Miller Rd Scottsdale, AZ 85251	\$198.70	Paid Fulfilled	Wed, Feb 15th 1:30pm EST View
1050 Placed Feb 13th	6730 W Avalon Dr Phoenix, AZ 85033	\$169.49	Paid Unfulfilled	Thu, Feb 16th 11:30am EST View
1047 Placed Feb 10th	6730 E Avalon Dr Phoenix, AZ 85018	\$0.00	Paid Unfulfilled	Fri, Feb 24th 2:00pm EST View
1044 Placed Feb 10th	9616 E Camino Del Santo Scottsdale, AZ 85260	\$0.00	Paid Fulfilled	No appointments View

Place New Order

Have an upcoming listing that is going to market soon and need to book Snap2Close to come out for photos and media to help list the property? Easy! Click the purple Place Order button at the top of the left navigation menu to place a new order and schedule the appointment with your photographer without ever having to leave your dashboard or pick up your phone!

The screenshot shows the 'Place Order' screen in the Snap2Close interface. The top navigation bar includes the user's name 'Charlie Taylor' and a search bar. The left sidebar lists various navigation options: 'Place Order' (highlighted), 'Credit Balance: \$0.00', 'Dashboard', 'GENERAL' (Listings, Orders), 'LEADS + MARKETING' (Leads), and 'MORE' (App Store, Team, Settings). The main content area is titled 'Place Order' and features a large 'Place Order' button, a search bar, and a list of order types: 'Residential Real Estate', 'Vacation Rentals', and 'Commercial Real Estate'. Below the list is a message: 'Please select an order form below to continue.'

Orders + Appointments

If an order contains an appointment, click into the order and scroll down to view the appointment information. The order of appearance is your order information, a map to your listing, a payment button, the date and estimated time of your appointment, and the custom fields you completed when placing your order. You can change the custom field information before the photoshoot. This information is presented to your photographer, editor and quality assurance team.

The screenshot displays the 'Order #1097' page in the Snap2Close interface. The top navigation bar includes the user name 'Charlie Taylor', a search bar, and a profile icon. The left sidebar contains navigation links: 'Place Order', 'Credit Balance: \$0.00', 'Dashboard', 'GENERAL' (with sub-links for Listings and Orders), 'LEADS + MARKETING' (with a link for Leads), and 'MORE' (with links for App Store, Team, and Settings). The main content area is titled 'Order #1097' and includes status tags 'Unpaid' and 'Unfulfilled', a 'Status Page' button, and an 'Overview' tab. The 'Invoice & Payments' section lists the following items:

Item	Amount
5 - Twilight Photography Upgrade - \$159 - 1 Image <small>Choose this package if the twilight photos are taken at the end of the photoshoot. Twilight photography, also known as dusk photography, begins just before sunset and highlights the exterior features of your home or listing. It is meant to emphasize special features such as pools, lakes, landscape lighting, fire pits, mountain views, and sunsets.</small>	\$159.00
Gold Package - 1,501-2,000 sq ft <small>COMBINED SERVICES AT 20% DISCOUNT HDR Photos Unbranded Website (MLS Virtual Tour Link) Branded Property Website Custom Marketing Package CubiCasa Floor Plans Two Interactive Floor Plans Zillow 3D Tour MLS Compliant Walkthrough Video Branded Walkthrough Video QR Code Links to Branded and Unbranded Property Websites.</small>	\$409.60
Travel Fee for Each Photographer <small>Fee of \$16.80 for the first 24 miles traveled = \$16.80 total applied for Charlie Taylor on Appointment #1</small>	\$16.80
Subtotal:	\$585.40
Taxes:	
Scottsdale Sales Tax (1.75%)	\$10.23
Maricopa County Tax (1.6%)	\$9.35
Arizona State Tax (5.6%)	\$32.77
Total:	\$637.75

Additional features on the page include a 'Make a Payment' button, a 'Download Invoice' button, and a map showing the property address: 7367 W Hill Lane, Glendale, AZ, 85310.

Client Rescheduling

It's helpful to review the appointment information on the order, but you can also reschedule or cancel appointments if needed. Click the [Cancel or Reschedule Appointment](#) link and you will be taken to a scheduling page where you can select a new day and time to complete the appointment.

Leads

Snap2Close provides you with a Branded Property Website, which includes a Contact Form for emails. Every time someone uses the form then you will receive an email. Plus the message is also added to your Leads Section.

Charlie Taylor

Search

Charlie Taylor

Place Order

Credit Balance: \$0.00

Dashboard

GENERAL

Listings

Orders

LEADS + MARKETING

Leads

MORE

App Store

Team

Settings

Leads

All LeadsMarked as Spam

NAME	LISTING	MESSAGE		
<div>CT</div> <div>Charlie Taylor</div> <div>Charlie@Snap2Close.com</div> <div>(480) 256-8359</div>	4153 S Tigre Del Mar Dr Gold Canyon, AZ 85118	This is a sample message.	Mark Spam	Delete
<div>CN</div> <div>Customer Name</div> <div>CustomerName@email.com</div> <div>(888) 888-8888</div>	4153 S Tigre Del Mar Dr Gold Canyon, AZ 85118	This is a test message.	Mark Spam	Delete

Settings

I am jumping below The Team for a reason here. Settings are for your personal account.

Settings

User Settings

Settings that relate to your individual user.

User Details

Update your user details such as login email and password.

Notification Preferences

Configure your notification preferences.

Group Settings

Settings that relate to your entire group.

Notifications

Configure notification templates, and assign additional recipients to notifications.

Social Profile Links

Update your group's social profile links.

User Details

The information contained here was entered by you when you created your account or when Snap2Close transferred data from our former software provider. Please be sure this information is correct. Below each section is an Update button. Be sure to click the button for each section you update. This is always where you can reset your password.

Notification Preferences

Our Client Portal Software wants to make sure you are notified by your preferred channel preference. Your basic choices are EMAIL and SMS (text)

NOTIFICATION	EMAIL	SMS ⓘ	PUSH
Account Activation	<input checked="" type="checkbox"/>	n/a	n/a
Appointment Canceled	<input type="checkbox"/>	<input checked="" type="checkbox"/>	n/a
Appointment Postponed	<input type="checkbox"/>	<input checked="" type="checkbox"/>	n/a
Appointment Reminder	<input type="checkbox"/>	<input checked="" type="checkbox"/>	n/a
Appointment Rescheduled	<input type="checkbox"/>	<input checked="" type="checkbox"/>	n/a
Appointment Scheduled	<input checked="" type="checkbox"/>	<input type="checkbox"/>	n/a
Content Delivered	n/a	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Customer Team Member Activation	<input checked="" type="checkbox"/>	n/a	n/a
New Lead Notification	<input checked="" type="checkbox"/>	n/a	n/a
Order Confirmation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	n/a

These preferences can be changed at any time.

Notifications

This section gives you the opportunity to select which Team Members are notified.

Notifications sent to your team		
These notifications are sent to your team members when certain events take place.		
NOTIFICATION	DESCRIPTION	
Account Activation Email	Sent to new clients to activate their accounts (if not active).	Edit
Appointment Canceled Email, SMS	Sent when an appointment has been canceled.	Edit
Appointment Postponed Email, SMS	Sent when an appointment has been postponed.	Edit
Appointment Reminder Email, SMS	Sent as a reminder for an upcoming appointment.	Edit
Appointment Rescheduled Email, SMS	Sent when an appointment has been rescheduled.	Edit
Appointment Scheduled Email, SMS	Sent when an appointment has been scheduled.	Edit
Content Delivered Email, SMS, Push	Sent when listing content is delivered.	Edit
Customer Team Member Activation Email	Sent to new team members of your customers.	Edit
New Lead Notification Email	Sent to customers when a lead is submitted on a property website.	Edit
Order Confirmation Email, SMS	Sent when an order has been placed for your team.	Edit

This may take a few seconds to complete but each step needs to be completed.

Recipients

Configure which team members will be added to each Account Activation notification that is sent to your team.

 No overrides available for this notification.

- ☒ Charlie Taylor
Owner - Active
- ☒ Jane Assistant
Member - Invited
- ☐ Mary Transaction Coordinator
Member - Invited

Update Recipients

Social Profiles

Snap2Close provides you with a Branded Property Website for each of your photoshoots. Social links icons are automatically added for fields completed here.



Social Profiles

Social Media Profiles

Update your social media profiles here. These profiles can be displayed on various marketing materials and landing pages throughout the system.

Facebook Profile Link

Instagram Profile Link

Twitter Profile Link

LinkedIn Profile Link

Update Social Media Profiles

Listing Portal Profiles

Update your profiles for external listing portals, providing more easy ways for potential customers to connect with you.

Zillow Profile Link




Update Listing Portal Profiles

The Team

Snap2Close allows you to invite team members to join your account and provides the ability to limit what each team member can access. A basic example of Team Members might be an assistant and a transaction coordinator.

Team Members

+ Add Team Member

	NAME	ACCESS ROLE	ACTIVATION STATUS	
	Charlie Taylor	Owner	Active	Edit
	Mary Transaction Coordinator	Member	Resend Invite	Edit Delete
	Jane Assistant	Member	Resend Invite	Edit Delete

Add Team Member

You will be able to add your team members by clicking on the “+ Add Team Member” button.

Enter the required information and then click the "Add Team Member" button.

Add Team Member

Member Information

Invite a new person to join your team. Once part of your team, they'll have full access to all of your listings and content. This is great for assistants, marketing admins, or back office staff.

First name


Last name

Email address

Phone number

Timezone

Avatar



Upload a file or drag and drop
PNG, JPG, GIF up to 500KB

Add Team Member

The new Team Member invited will receive an email inviting them to complete their account. Once invited to join, each member of your team will be able to access the business account with their own unique login.

Edit Team Members

You, as the Team Owner, have control how your members can interact with your Team. You can quickly update or modify their functionality. Here are steps you can control.

1. Member information
2. Notification Setting
3. Permissions (what you allow them to do for you)
4. Change the ownership of the Team
5. Delete a Team Member.

Edit Team Member



Mary Transaction Coordinator hasn't accepted their invite to become a team member. Resend the invite to **mary.transactions.coordinator@mybrokerage.com**.

Resend Team Invite



Member Information

Update this team member's details.



Notification Settings

Configure which channels the team member should receive notifications on, and select if they should be assigned as additional recipients on notifications.



Member Permissions

Choose which actions this team member is able to complete.



Transfer Ownership

Set Mary Transaction Coordinator as the group owner.



Delete Team Member

Remove Mary Transaction Coordinator from your account. They will no longer be able to access any of your listings or content.

Team Notifications

Notification settings put you in total control over who receives which notifications on your team. Select which channels the team member will receive notifications on. These settings are also configurable by the team member.

You can quickly control what notifications you want the Member to see.

Additional Recipient Settings

Select which notifications this team member should be added to when these notifications are sent to your team.

<input type="checkbox"/>	Account Activation Sent to new clients to activate their accounts (if not active).
<input type="checkbox"/>	Appointment Canceled Sent when an appointment has been canceled.
<input type="checkbox"/>	Appointment Postponed Sent when an appointment has been postponed.
<input type="checkbox"/>	Appointment Reminder Sent as a reminder for an upcoming appointment.
<input type="checkbox"/>	Appointment Rescheduled Sent when an appointment has been rescheduled.
<input checked="" type="checkbox"/>	Appointment Scheduled Sent when an appointment has been scheduled.
<input checked="" type="checkbox"/>	Content Delivered Sent when listing content is delivered.
<input type="checkbox"/>	Customer Team Member Activation Sent to new team members of your customers.
<input type="checkbox"/>	Order Confirmation Sent when an order has been placed for your team.

Member Permissions

Select the team member whose permissions you want to control and choose which actions this team member is able to complete. Here, you can control the access this team member has to your account and business.



Member Permissions

Choose which actions this team member is able to complete.

Listing Permissions

Select which Listing permissions this team member should be added have.



Create

User can create new listings.



Delete

User can delete undelivered listings.

App Store Permissions

Select which App Store permissions this team member should be added have.



View All

User can view all the apps in the Aryeo App Store and manage API tokens.

Update Permissions

You can learn more about Portal Overview by watching our video tutorials, [The Dashboard, Orders and Listings](#) 6:47 Minutes and [Your Team and Settings](#) 7:28 seconds