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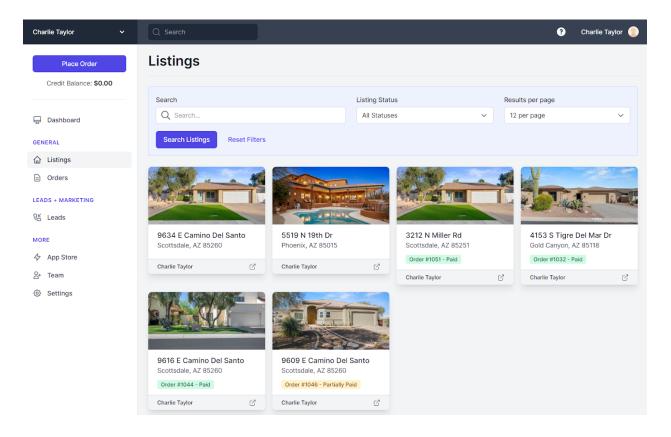
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Customer Portal Overview

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.



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.

Atsace Cold Canyon, AZ 85118 Odd Canyon, AZ 85118 Cold Canyon, AZ 85118 Outck Actions Cold Canyon and a cold canyon and	Download
Property Details	~
Images	Rearrange Add V
Videos	Add 🗸
Floorplans	Rearrange Add V
3D Content	Add 🗸
Files	Add 🗸
Order #1032	\$0.00 View ~
Property Websites Domains	View Editor V
Marketing Materials	Create 🗸

Please review our video tutorial on <u>The Dashboard</u>, <u>Orders and Listings</u> 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.

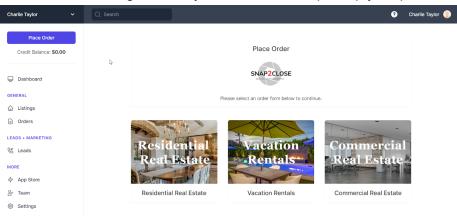
Orders

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.

Charlie Taylor 🛛 🗸 🗸	Q Search						? Charlie	Taylor
Place Order	Orders							
Credit Balance: \$0.00							+ Pla	ace Order
🖵 Dashboard	Search				Fulfillment Status		Payment Status	
GENERAL	Q Search by add	dress			Any Fulfillment Status	~	Any Payment Status	~
合 Listings	Search Orders	Reset Filters						
Crders								
EADS + MARKETING	✓ More Filters							
🖞 Leads		C3						
IORE	NUMBER	ADDRESS	TOTAL	STATUS	1	APPOINTMEN	TS	
App Store	1051 Placed Feb 13th	3212 N Miller Rd Scottsdale, AZ 85251	\$198.70	Paid	Fulfilled	Wed, Feb 15th	1:30pm EST 🌐	View
암· Team ⓒ Settings	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	2:00pm EST 🕀	View
	1044 Placed Feb 10th	9616 E Camino Del Santo Scottsdale, AZ 85260	\$0.00	Paid	Fulfilled	No appointmen	ts	View

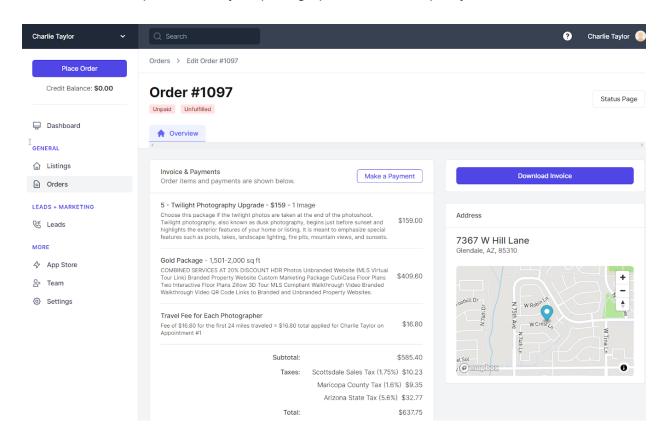
Place New Order

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!



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.



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** tes link and you will be taken to a scheduling page where you can select a new day and time to complete the appointment.

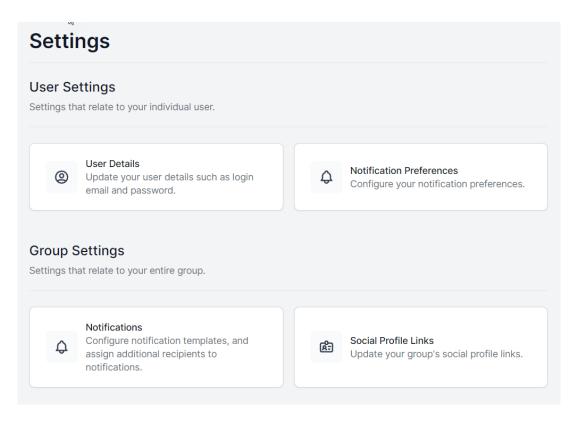
Leads

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 🗸 🗸	Q Search			? Cha	rlie Taylor 🛛 🎈
Place Order	Leads				
Credit Balance: \$0.00	All Leads Marked as Spam				
GENERAL	NAME	LISTING	MESSAGE		
Listings Orders	Charlie Taylor Charlie@Snap2Close.com (480) 256-8359	4153 S Tigre Del Mar Dr Gold Canyon, AZ 85118	This is a sample message.	Mark Spam	Delete
LEADS + MARKETING	CN Customer Name CustomerName@email.co (888) 888-8888	om 4153 S Tigre Del Mar Dr Gold Canyon, AZ 85118	This is a test message.	Mark Spam	Delete
MORE					
☆ App Store App Team					
Settings					

Settings

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



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 alway 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 (j)	PUSH
Account Activation		n/a	n/a
Appointment Canceled		0	n/a
Appointment Postponed		٥	n/a
Appointment Reminder			n/a
Appointment Rescheduled			n/a
Appointment Scheduled			n/a
Content Delivered	n/a		۵
Customer Team Member Activation	٥	n/a	n/a
New Lead Notification	٥	n/a	n/a
Order Confirmation	۵		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 notifi	ication.	
	\searrow	
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.

G 🖬 🖄

Social Media Profiles Update your social media prof landing pages throughout the	files here. These profiles can be display system.	ed on various marketing materials an
Facebook Profile Link	L3	
https://www.facebook.com/	/Snap2Close	
Instagram Profile Link		
https://www.instagram.com	/your-company-name	
Twitter Profile Link		
https://twitter.com/your-cor	mpany-name	
LinkedIn Profile Link		
https://www.linkedin.com/in	/charlie-taylor-0b5b82119/	
		Update Social Media Profiles
Listing Portal Profiles Update your profiles for extern connect with you.	nal listing portals, providing more easy v	ways for potential customers to
Zillow Profile Link		
https://www.zillow.com/prof	file/snap2close	

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 Q Search Team Members... Add Team Member + ACCESS ACTIVATION NAME ROLE STATUS 2 Charlie Taylor Edit Owner Active Mary Transaction Coordinator Resend Invite Edit Member 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.

dd Team Member		
Member Information Invite a new person to join your team. Once and content. This is great for assistants, m		
First name		
Last name		
Email address		
Phone number		
Timezone		
America/New_York		~
,		
	load 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

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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.

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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.

Account Activation Sent to new clients to activate their accounts (if not active).
Appointment Canceled Sen th yhen an appointment has been canceled.
Appointment Postponed Sent when an appointment has been postponed.
Appointment Reminder Sent as a reminder for an upcoming appointment.
Appointment Rescheduled Sent when an appointment has been rescheduled.
Appointment Scheduled Sent when an appointment has been scheduled.
Content Delivered Sent when listing content is delivered.
Customer Team Member Activation Sent to new team members of your customers.
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.

20	Member Permissions Choose which actions this team member is able to complete.
Lis	ting Permissions
Se	lect which Listing permissions this team member should be added have.
(Create User can create new listings.
	Delete User can delete undelivered listings.
	p Store Permissions lect 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, <u>The Dashboard</u>, <u>Orders and Listings</u> 6:47 Minutes and <u>Your Team and Settings</u> 7:28 seconds