<u>**How to set up the Portal for your Clients**</u>

The portal is a site where contacts can keep track of listings, send messages to their agent, and keep track of listings they like and dislike. The agent can view a client's activity on the portal to see what listings a client has liked or disliked. Below are steps on how to set up a portal for your client.

Before you set up a portal for your clients, you must go to preferences and portal preferences to turn on your portal. Make the toggle for ON is set for the status.
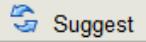
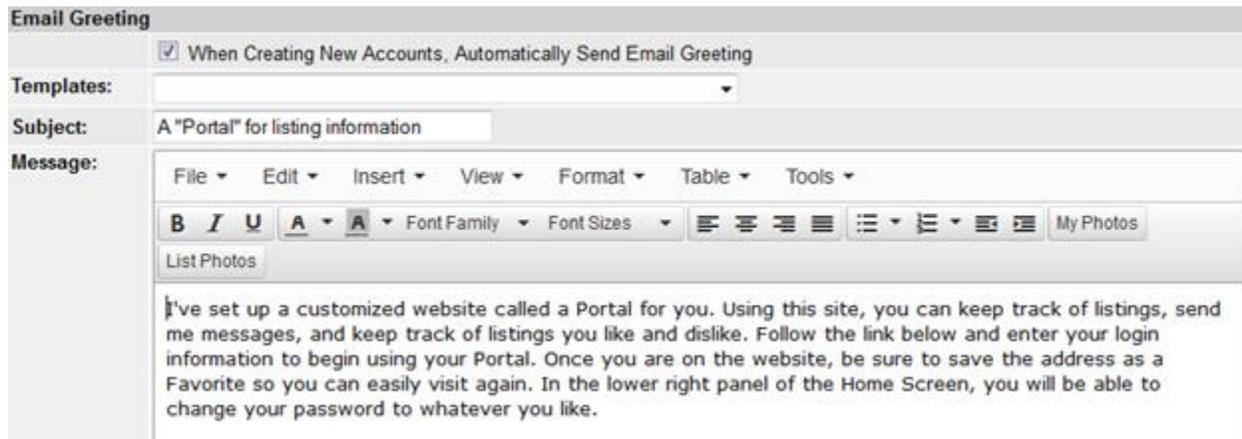Below this you will see the email greeting section. By default, an email is sent to your client when a portal account is created. The message is what the client will receive in the email. You can add text or edit the text in this message if you would like to.

You will be able to set the preferences for all of your contacts' portals

You can choose the start position which means the first thing your contact will see when viewing a listing. You can also select a view or sort if you choose to. The selections with a check mark mean those will be included in your contacts' portal. The selections without a checkmark mean these will be excluded from the portal and your contact will not be able to see this information. Keep in mind, whatever report you select for the portal will also be the report that is displayed when using the share function in the system.

After you are satisfied with your selections, remember to click Save at the bottom of the screen. You can click Save and View to see how the portal will look for your clients.

Once you have turned your portal status on and saved your preferences, you can now turn the portal on for your clients. There must be a search previously attached to your contact or you must attach a search to your contact before turning the portal. To turn the portal on, go to the contacts tab and click on contact management. In contact management, click on the clients name and then click on the portal tab.

Begin by setting up a username and password. You may type a password or use the link marked Generate password. Click Create Account to finish. By default, the Send Notification option is marked, and it will send an e-mail to your contact when you have clicked Create Account with their login information and information about the portal.

To send an e-mail to your contact inviting them to the portal at any other time, click E-mail Portal Link. You may modify the default subject and message, and choose if you would like to include the contact's username. You may automatically generate a password for the client and have that new password included in the message as well.

In the portal your client can favorite listings, like listings, and dislike listings. To view this activity, you will go to the portal tab in contact management for a specific contact.

Click on the links to view the corresponding listings in each cart. For example, if you wish to view the listings your client has liked. Click the word like. If you need to make a change to the listings that are contained in any of the carts, you may do so by clicking on the cart name, and making changes to the preference markings from there. If you wish to clear all items from one of the carts, click on the red X next to the cart name to remove all listings from the cart. A confirmation screen will appear before the listings are permanently removed.

When viewing the contents of a listing cart for a contact or the search results of a search attached to the contact, you may mark listings as recommended. Click the star to mark a listing as recommended. Once you have marked listings as recommended, a new cart will be generated for that contact. You can review your recommendations on the portal tab for the selected contact under Portal Listing Carts, and your contact will see the Recommended cart on the portal dashboard.

To preview what your clients portal will look like, click View Portal.
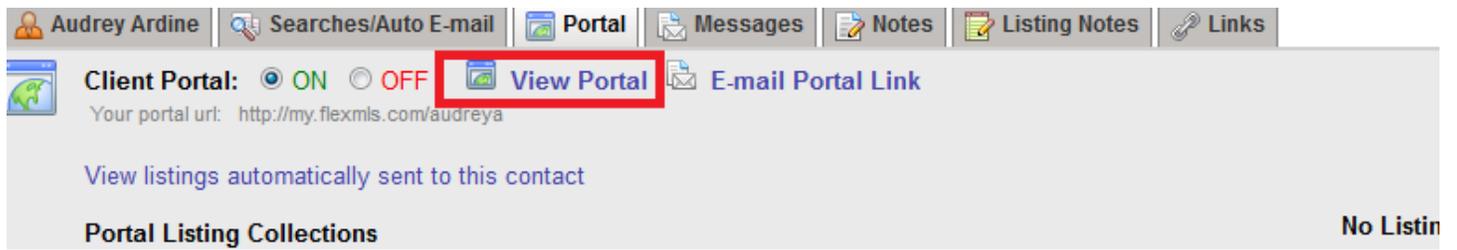
This link provides you with an agent-side version of what your client would see.

By default, the customer portal uses the settings you have specified on the Portal Preferences page, accessible under Preferences on the menu. To change the settings for the selected client, click Change Settings. On the Portal Settings panel, make you selections and click Save Settings to apply the change.
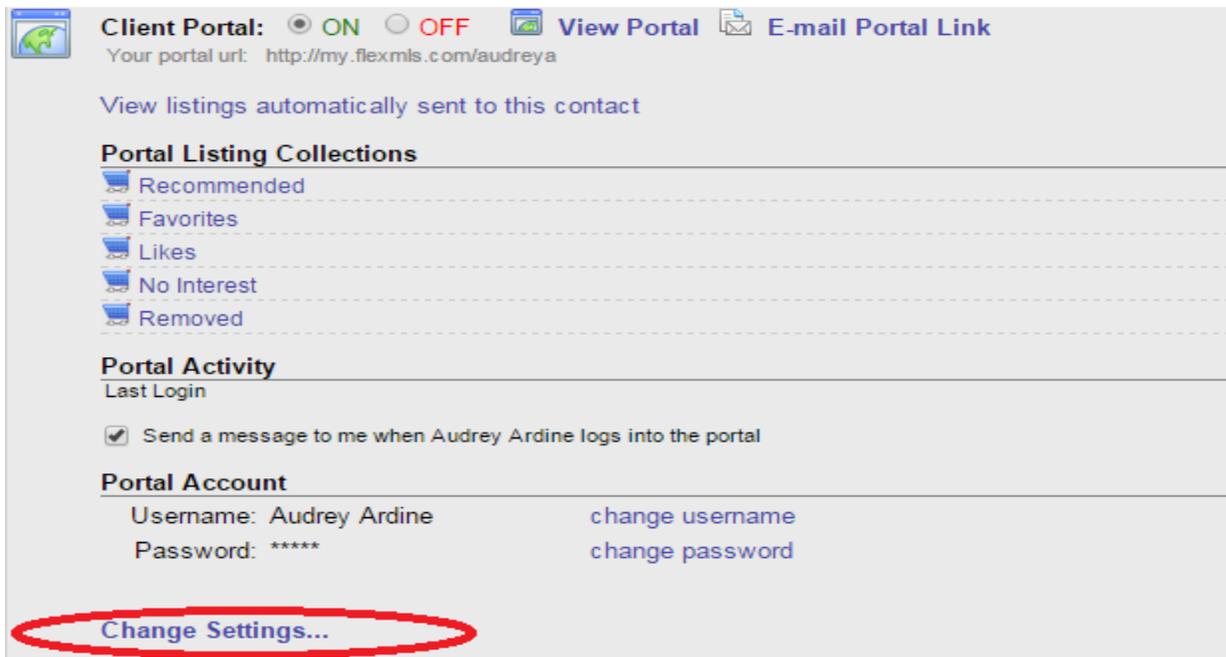
When your client logins to the portal for the first time, they have the option to view a PDF about how to use the portal or watch a video tutorial. They can also click the help button in the upper right hand corner of the screen.