

4 BIZ App USER GUIDE

Getting Started

The 4 BIZ App runs as a browser based application (SAAS / cloud software). So open your favorite browser on any (mobile device, laptop or desktop computer), and login (using your credentials you registered with) or register if you have not at: <https://4bizapp.com/app/>

4 IMPORTANT Things to understand before starting:

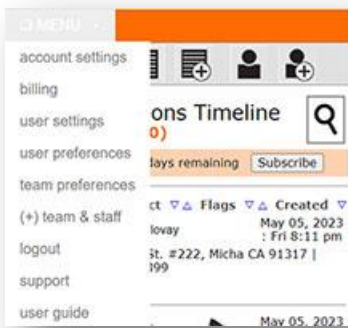
1. **You (the subscriber & team / staff), do not call or reply back directly to your toll free number.** Use the 4 BIZ App to initiate calls with contacts. Using the 4 BIZ App to initiate calls allows your recorded calls to be properly linked to their associated transaction(s). When using the 4 BIZ App to make a call to a contact, a call back occurs (where the system calls you first). Answer this call. You should recognize the toll free number you were assigned for all your transactions, and then the system will call your selected contact. This method also allows you to use any of your phone numbers (i.e. home, office mobile, etc.) to receive the initial call back. After you answer the call, no one is there yet, it is the system. Next the system will dial and connects you to your contact's number you selected (i.e. your contact's home, office mobile, etc.). This all occurs very quickly. **Your (B2C) client contacts need to dial the toll free number direct** they receive in a welcome email / text (that also includes a vCard) issued after you add them to a transaction in order to reach you. They do not use the browser app, nor do they have access to it to make calls. They can simply use any phone or call / voice capable device to call you. Your business associates (B2B service providers) use the app, to capitalize on all the same benefits you do.
2. **The same as above applies for text messages.** You the subscriber, team / staff and B2B contacts will use the app to send / receive text messages. However, your B2C contacts (like your seller or buyer clients) do not need or use the app. They use their favorite native text application(s). B2B contacts involved in your transaction, like service providers (i.e. other agents, title reps, appraisers, home inspectors, etc.) use the app to text you, in order to get all the app's benefits.
3. **Do not set up your 4 BIZ App assigned email address as a POP or IMAP email account.** It will not work. It is a relay as explained in more detail further.
4. **When using your 4 BIZ App assigned email address to CC / BCC copies of electronic documents, include a subject that is recognized as part of the transaction.** This is explained in more detail further.

Navigation (The 6 key icons):



1. The number in the red circle under the logo shows unread communications.
2. The home icon takes you to your most recent 100 communications in the timeline, and this is the default home page.
3. The transaction icon (to the right of the home icon) allows you to manage a transaction, edit it, and most importantly to link contacts and contact groups to the transaction. **Note** - You must link contacts and / or contact groups to begin collecting communications into a transaction timeline. You will receive a warning when there are no contacts linked to a transaction, shown only from the transaction page.
4. The next icon creates a new transaction. Each transaction uses a naming schema that combines the address & unique ID that can be an (MLS, file, case, document or ID number – that is user selectable). For example by applying an MLS#, this is how a sample transaction would appear in the 4 BIZ App and in an email subject line: 456 Mac St. #222, Micha CA 91317 | MLS# 12399
Important – When using your assigned email address (i.e. – janessmith@4bizapp.com) to CC or BCC copies of e-docs into the 4 BIZ App, you must include either the entire naming schema, or at least enough of a sufficient subject match to allow the 4 BIZ App to catalog it into the correct transaction. Here are some shortened examples that would be acceptable: Example 1: 456 Mac St. #222 Micha | Example 2: MLS# 12399.
5. The contact icon is used to manage contacts, edit contact data, build contact groups, and to access contact dossier reports. These reports include their Preferred Communications, Communication Issues, Trust Analysis and Pos(+) to Neg(-) Communication Analysis reports.
6. The next add (+) contact icon (following to the right of the contact icon) is used to create a new contact. **Note** - (See below in Phone / Voice recording the importance of you the subscriber properly defining each contact correctly in regards to B2C – client / B2B – service provider. Additionally after a contact is added, their phone recording preferences are assigned / automated by the 4 BIZ App. **Important** - you have the option to override / manually change these recording settings from the Contacts (icon)->Edit icon (pencil) that corresponds with the desired contact.

Navigation Menu (9 dropdown options)



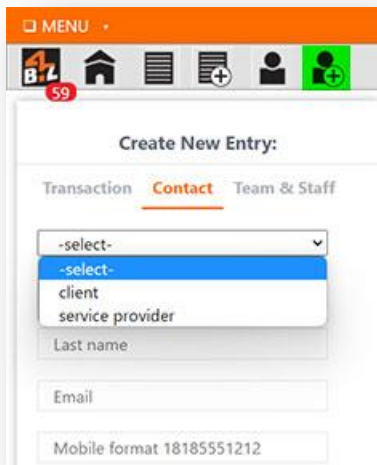
1. **Account settings** – Provides system information, like your assigned toll free number and email.
2. **Billing** – See your current month’s usage in correlation to your current plan limits. See the previous month’s usage. Update your Credit Card. Cancel your subscription.
3. **User settings** - Edit your personal information & change your password.
4. **User preferences** – Set your call routing (follow me) parameters, so when a contact calls you they are routed to the phone numbers you want, including VM (this system’s voice mail). These phone numbers can be directed to team or staff as well. **Important** - Select (dropdown: text alerts under the heading User Notifications & Delivery) if you want text message alerts sent to you when new contact communications are received. **Note** - Sentiment / priority alerts are disabled along with all text alerts from Menu->user preferences (one dropdown for user, the other for team members) or by replying back to text messages “STOP TEXTS”. **Important** - You can modify your sentiment analysis sensitivity from here as well. This setting is responsible for triggering when communications are deemed high priority, based on the ratio of positive to negative content in a communication. If the system is sending you high priority alerts derived from your contact’s communications, and you feel like these are not high priority, reduce the sentiment sensitivity in the appropriate dropdown menu. Your options are from 1-10, with 1 being the lowest sensitivity and 10 the highest sensitivity. The reverse is true. If you receive messages that you deem are high priority, yet the system did not alert you, increase the sensitivity via the corresponding dropdown menu. **Important** – Set your preferred call recording default behavior to be applied as you add new B2C contacts (i.e. customers / clients) into the system. B2B contacts (i.e. service providers, like other agents, title reps, appraisers, home inspectors, etc.) are always recorded when initiating calls, or receiving them from the app.
5. **Team / Staff preferences** – From here you can assign the level of system access each team / staff members has once logged into the 4 BIZ App, by clicking the level bar icons. Use the tooltips to learn more about various levels. **Important** – From Menu->team preferences you can temporarily or permanently block their access to the app itself. Text notifications that alert them of new communications can be set in Menu->user preferences under the heading Team Notifications & Delivery. By default it is set to “ON”. **Note** – Activating or disabling the communication icons: where phone (represents only VM / voice messages) and others icons also exist for email or text, control whether team / staff can view these archived communications in

the timeline. When phone is selected, team / staff never see a primary subscriber's complete phone calls. The timeline only displays VM (voice messages).

6. **(+) Team & Staff** – add new team or staff members into your account.
7. **Logout** – end session. **Note** - If you set the (checkbox: "remember me") to "ON" when you log in, you will have 180 days (assuming you do not delete your cookies). If you delete your cookies or they expire naturally, you will have to enter a secondary authorization text code to login next time, and all this occurs automatically in accordance with standard practice.
8. **Support** – An email ticket support system that will respond to your primary (non 4 BIZ App) email address with a resolution to your issue, or make a request for more information.
9. **User Guide** – this manual.

Phone / Voice recording - After subscribing (or when starting a trial) you should have received a text containing: 1 vCard, with your toll free number. This information was also issued in a welcome email.

Be sure to add this vCard to your devices that accept it to ensure you can identify the 4 BIZ App toll free number.



It is important to correctly define the contact type when adding a new contact. This controls the correct PBX recording options / prompts based on the contact type selected and can affect routing and other working parameters.

Also when adding contacts or contact groups (also termed linking) to a transaction, credentials are sent by email / text to them, like their assigned toll free number to use for calling / texting.

This might also include automatically setting up B2B users into the transaction, from their account, and logging communications into their timeline when applicable.

The toll free number assigned to you is located in Menu->Account Settings.

The phone / voice recording:

The 4 BIZ App has applied automation to assist in the recording process, but you should still educate yourself as to the legalities of recording calls in your state, and be aware of changes made to help ensure you and the 4BIZApp are continually complying.

Recording call: Federal laws only require one party consent to record calls. However, many state laws take precedent and require two (or multi) party consent to record calls.

The BIZ App applies text notifications within the APP as to the recording settings in place for each contact. These settings rely on the accuracy of the resident state you define to your business and the contacts you add to your contact list. These can be affected further by the geo location of app users and their contacts when they make calls. It is your responsibility to maintain this information for accuracy. For example if you contact moves to a different state, update this change immediately. If you see any discrepancies with your state laws and how the 4BIZApp is processing the recording of calls, please contact support to address this, as recording laws are subject to change anytime and may occur before updates to the app can keep up.

These are the recording options automatically assignable to each B2C contact:

- contact chooses to record - **This is the default behavior** (and you can change the default in Menu->user preferences). The 4 BIZ App gives your B2C (i.e. clients / customers) the opportunity to opt into recording all calls in either direction, (or decline recording all calls). Opting in by a contact to agree to record all calls in either direction, offers contacts the added incentive of receiving a free copy of all their conversations (with you and / or your staff / team members) automatically emailed to them in mp3 format at the end of each call. This (opt in / opt out) process occurs when your contact calls your assigned toll free number the first time and then selects the corresponding key pad option noted in the recording prompt. It only occurs 1 time, as their recording preferences are saved and recalled / verified ever subsequent call, unless they hang up on it or do not complete making a selection, in which case it would play again when they call back. This option will only occur when the system applies 2 party consent recording rules. **Important** – The downside to this option is a contact could *opt out* of all recordings. The upside to this option in a two (or multi) consent state is, if the contact *opts in* to all recordings, when you call the contact (after they have granted recording permissions), all subsequent calls in either direction will always be automatically recorded without the need for a recording prompt or beeps / tones.
- record all calls – This process becomes active when a contact accepts recording from the above option or in instances where you and the contact are both in a 1 party consent state, this option is then triggered automatically, when the above option remains the default setting. **Important** – While this is legally acceptable, remember your contact will not be aware both inbound and outbound calls are always being recorded, but the system will alert to this before your call is connected with any contact under these conditions.
- record call – play prompt – This always records your contact’s inbound call when they use your assigned toll free number, after the system plays the recording prompt alert. I.e. – “This call may be recorded for transaction purposes.” **Important** – The upside of this option is, (assuming your contact does not back out and allows the call to connect), these calls are always recorded when the contact calls you. The downside is, if you initiate the call to the contact (with this option selected, since this option is not granting blanket permissions to all recordings in either direction), in two (or multi) consent states (or interstate situations with a 1 and 2 party consent state) the call would need to have the legally required tones / beeps played to allow the call to be recorded and the system alert you to this by prompt and provides various options for you to

choose from. **Note** – If your contact asks what the tones / beeps are for, you could tell them you are recording transaction calls to better protect all parties. This option does not email recordings of conversations to your contact.

- never record call – no call will ever be recorded with this selection, in either direction.

If a contact had previously accepted all recordings from a “contact chooses to record” option, you should not change it, as changing it back will then require their approval again. However if they ask you to disable all recordings later, you should comply with their request.

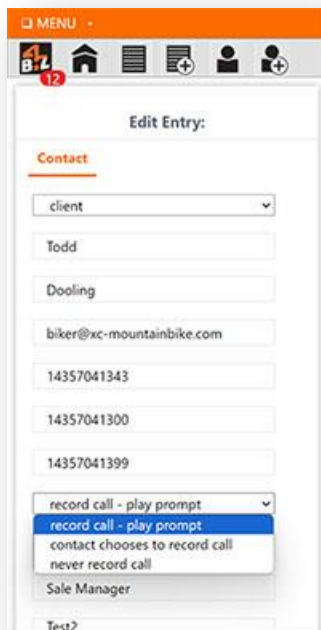
Always use the 4 BIZ App to call contacts that denied all recordings, in order to ensure they continue to text you from your 4 BIZ App assigned toll free number, so these text messages get properly logged into your timelines.

B2B contacts like service providers do not have assignable recording options. When calls are made between you, and both callers have granted consent (2 party) by agreeing to the 4 BIZ App terms of service, all calls are automatically recorded under 2 party consent rules. If 1 party has not granted consent, and the call occurs in a 1 party consent state, the calls are also automatically recorded. In a 2 party consent state where 1 party has not provided consent, you must select an option provided by the system. All these conditions are defined by text when you make calls, and then audio recording prompts are played explaining these conditions further before connecting calls. In some instances you will need to select additional options before the call can be connected, typically in 2 party consent states, where 1 party has not granted consent yet.

Important – Change your preferred recording call default behavior to be applied as you add new B2C contacts into the system (Menu->user preferences).



Change recording settings already applied to an individual contact by clicking the contact icon, then the edit pencil icon associated with them. Use the appropriate dropdown menu to change recording settings.



Note - The 4 BIZ App only has to save your (B2C) contact / client's recording preferences one time when the setting: contact chooses to record is applied, and then every subsequent time they call you, they are automatically recognized and are never bothered with this process again. The emailing of the call by mp3 audio file to them is fully automated.

Note - If a contact hangs up when the setting: contact chooses to record has been set before saving their recording preferences, the system will again make an attempt to allow them to set their recording preference for all transaction communications when they make their next call using your assigned toll free number.

Note - Should you decide to get a contact(s) recording permission in advance by written or electronic contract, you can manually adjust recording settings after a new contact is added, by navigating to Contacts (icon)->Edit icon (pencil). Then use the recording dropdown to make the appropriate selection

B2B Automation

For service providers (B2B):

All B2B to B2B (service provider to service provider) calls are always recorded. There are no manual override recording settings for B2B contacts. Recording terms are accepted as a condition of using the app.

Understanding your 4 BIZ App email and getting the most out of it:

The 4 BIZ App's assigned email is a virtual relay. That said, you do not set it up as a traditional POP or IMAP email where a box is created with all your folders and messages. Instead, you continue to use your primary email address saved in your 4 BIZ App user settings and entered during registration.

When replying back to a transaction email in a chain, the 4 BIZ App has already setup the address routing, so you do not make any changes, just add your message. Do not alter the subject line. Do not remove any Routing: data codes within the message body, as these are automatically removed after processing, just prior to delivery.

When you or your contacts reply back to any transaction email in the chain, these communications will be captured into the 4 BIZ App database, available in the timeline.

It is a good habit to save your electronically signed documents / contracts into the 4 BIZ App timeline by adding your assigned 4 BIZ App email address via (CC or BCC) when issuing them. When performing this, you must include in your subject, either the entire transaction naming schema created by the 4 BIZ App, or at least a sufficient amount to create an email Subject match. This match allows the 4 BIZ App to properly catalog this email into the correct transaction. You need to either type or paste your 4 BIZ App transaction subject into your electronic document signing program's subject line, or electronic document signing programs will make their own default subject line that might not create a proper subject match for the 4 BIZ App. All these providers allow you to edit the subject line.

Here are some shortened examples that would be acceptable subject lines for matching from your electronic document program: 456 Mac St. #222 Micha OR MLS# 12399. Naturally it would be safest to use the full length name (example): 456 Mac St #222 Micha CA 91317 | MLS# 12399 that is also the best, most recognizable reference for your contacts in all communications to their transaction., just like you see in your timeline.

Important - Remove any commas, periods or punctuation in the subject line as email providers often mark such emails as SPAM.

While you can use your preferred email application (i.e. Outlook, Thunderbird, Gmail, Yahoo, etc.) to send and receive emails, you can also use the 4 BIZ App to initiate emails if you prefer to create new, reply or forward emails to contacts.

Important – Your email's subject line contains appended information for easy identification of its originating source (i.e. Subject: 456 Mac St. #225 Micha CA 91317 | MLS# 12399 - **Voice call**). This will occur for example, if you forward a voice call in your timeline to your email.

When using the 4 BIZ App to reply back by email, you can reply back to any type of communication (i.e. – Voice, - Text, -Email, - VM). If it was not originally an email, it will be replied back in an email friendly format.

Important – So what happens if your contact decides to create a brand new email with your 4 BIZ App email address and titles the subject "One more thing". Often times the 4 BIZ App will be able to apply its algorithm to determine the correct transaction to assign this email too. In any cases where the

transaction cannot be identified, the 4 BIZ App may issue a text message to the contact requesting a reply back with the appropriate transactions from a list of options. Finally, any communication can be manually moved to a different transaction and / or copied to another transaction should the communications address more than one transaction, or was cataloged incorrectly.

Emailing from a native email application (not using the 4 BIZ App)

When you (the subscriber) reply back to any transaction related email, (i.e. in the chain from your email application), you are replying back to the sender (your contact) identified in the FROM address. So if John Doe is your seller in a transaction, and you linked him to a transaction, he received a welcome chain email to reply back to you. When you reply back to this email, you are only communicating with him, and you will see his name in the FROM address and the corresponding transaction name in the subject line. You (the subscriber) also receive an introductory / new transaction email (when linking contacts to a transaction), and can be the first to start the chain, or use the 4 BIZ App to initiate emails.

If you setup a contact group that contains a title rep and an assistant and name it "Title", when you reply back to these emails, they will contain the name of contact group in the FROM address (derived from your naming schema, i.e. – FROM: Title). Take note, all contacts linked to a contact group will be receiving your emails. So in this example, the title rep and assistant would receive a copy to your reply back.

Emailing using the 4 BIZ App

Forwarding emails: You can forward any communication including its attachments to both individual contacts and contact groups. When an individual contact replies back, you are communication with just them. When a contact within a contact group replies back, all contacts linked within the contact group will be receiving copies of the email. A forward icon will be present in each communication in the timeline that was forwarded. Any type of communication can be forwarded, and it will be converted to an email friendly format and contain all of its original attachments. Voice and VM communications will include a text transcription and the call's mp3 audio file.

New & Reply Emails: The 4 BIZ App sets up the subject with the appropriate transaction and encodes the email with the proper routing data in the body text to ensure all the individual contacts and contact groups you selected receive the email. Do not alter this embedded routing data. After selecting the contacts and / or contact groups, click the open icon button, and this will open your default email program, allowing you to use the editing tools you are most comfortable with. You can also add attachments if desired.

Important – Each contact you add into the 4 BIZ App, regardless if they are part of a contact group can also be selected individually so you can email just them.

Contacts can be quickly added / combined or removed from contact groups.

For example, you might have “Appraiser”, “Title”, “Lender” and “Home Inspector” group(s) you use often. You may also have many other brokers / agents you conduct business with that might be setup as individuals, or in contact groups if you need to include their staff / assistants.

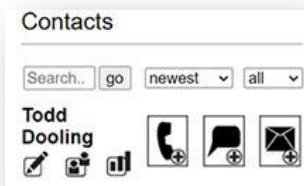
Important – For example, if you want to have a continuing dialogue throughout the transaction with your title contact group that also includes your two sellers, you would create a new contact group that contains your title rep, any other staff you want to add, and then add the two sellers. So you might click on your contact group you name “Acme Title”, when you are just communicating with title employees, and use your other group “Acme Title – Smiths” when you want your sellers (Jane & John Smith) and the title employees all involved in the same communications.




Note - If you alter (add or remove) contacts to an existing contact group during the transaction, these changes are effective immediately. For example, if you originally had Jane Smith as part of the contact group and removed her, and she replied back to your email, it would not be delivered if she replied back to an email that’s part of the contact group she previously belonged too.

Take advantage of using the 4 BIZ App’s email tools in order to compare them against using your native email application alone, and adopt the methods / strategy that is best suited to your workflow.

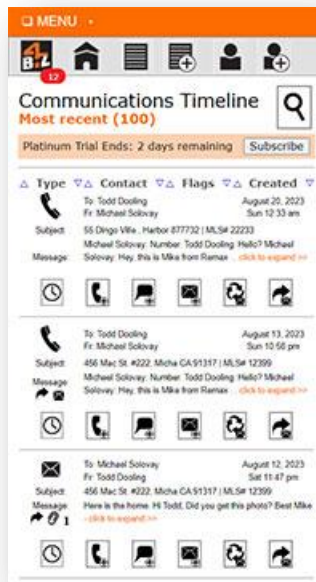
Using Timelines & Communication Functions:


From multiple locations, like the timeline, contacts and the transaction page, recognizable communications icons perform the following functions:




- The **phone**  icon allows a user to make a phone call with a contact.
- The **text**  icon allows a user to send text messages to one or more contacts.
- The **email**  icon allows a user to send a new email to one or more contacts.


Communication methods are available (phone, text & email) from several locations, with the quickest access point from each itemized communication:





The time icon  takes you to the full transaction timeline that corresponds to the communication you selected, where the transaction is denoted in the subject line.

The phone icon  allows you to call any contact linked to the transaction, denoted in the subject line.

The text icon  allows you to text any contact linked to the transaction, denoted in the subject line.

The first email icon  allows you to select the contacts linked to the transaction that you want to create / send a new email to, denoted in the subject line.

The second email icon  allows you to select the contacts of transaction you want to reply to the corresponding communication by email, denoted in the subject line. **Note** – Regardless of the type of communication you reply back to, it will be converted to an email friendly format.

The third email icon  allows you to select the contacts of a transaction you want to forward the corresponding communication by email, denoted in the subject line. **Note** – Regardless of the type of communication you forward, it will be converted to an email friendly format. For example if you forward a voice / phone call, the text transcription will be included in the body of the email, and the mp3 audio file included as an attachment. Communications like text or email with multiple attachments will all be included. **Note** - While you can add information to this email friendly forwarded communication, you cannot edit the existing communication. If you want to edit it, simply forwarded to your email on file, then you can manipulate it and redistribute it. The system also appends information to the subject line and body that helps identify the source of the original communication that was used and the originating date of the communication.

The widest array of options is available by clicking an abridged communication in the timeline that opens up the detailed unabridged expansion window. **Note** - the orange highlighted area appears when you mouse over message area. Click to expand:



The image below is the expanded detailed communication view, after clicking on the orange highlighted message area:



Unbridged Message: See the entire contents of the message associated with the communication.

Print your message when this function is support and the appropriate device is available.

Notes / Comments: Add information like notes, or comment to any individual communication while it is fresh in your mind. This makes it possible to search for these notes in the future. For example you might mark several communications in a specific transaction: “Disclosed driveway easement issue”.

Flags: These are also helpful for sorting communications where flags may have a specific meaning to you. **Note** – This also sorts all of your high priority (negative sentiment flagged) communications that will contain a fire icon for review.

Detailed Sentiment Analysis: Reporting details as they pertain to a specific / itemized communication.

Advanced Filing Options: Select the appropriate dropdown option to move a communication to a different transaction, or make a copy / duplicate of it to another transaction.

Attachments: There are 2 ways to retrieve attachments. First from this detailed unabridged communication view in the timeline. The second by click the **paper clip icon** available in the top pane of the transaction communication timeline. This method organizes every attachment in the transaction, like text, email, documents, audio from phone calls and video from video calls / meetings.

Downloading / saving attachments: There is a small download arrow button available under each attachment that allows you to save each file locally to the device you are using. For audio and video, use the play controls and click 3 vertical dots on the right side of the player to download them.



The above is reached by clicking the larger **paper clip** icon and only available from the transaction communication timeline. This master paper clip icon will display all the attachments for an entire transaction. This will include audio mp3 files from phone / VM and can also include video, images and other documents.

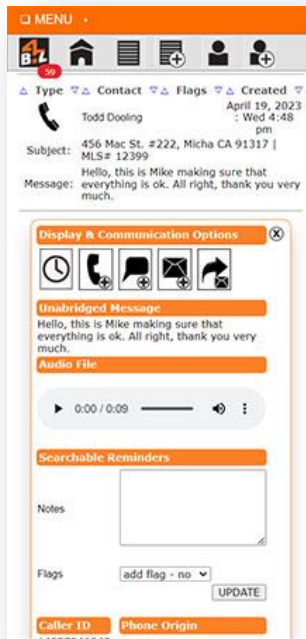


The **smaller paper clip** icon above associated with each communication, will only display the attachments that are part of that transaction, and were collected from the contact associated with the paper clip.



The above is a **detailed unbridged communication view** that contains an attachment. Notice the small paper clip icon (representing attachments) from the abridged message area. Email reply or forward



icons may also appear here for email communications only. No icon for an email means it was a new

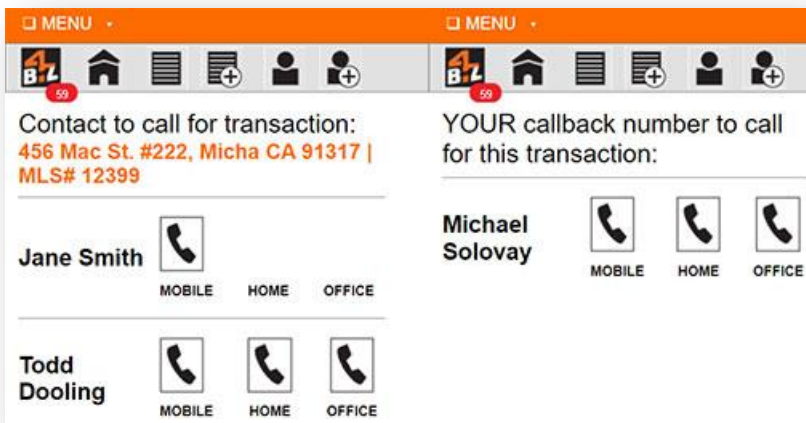


email.

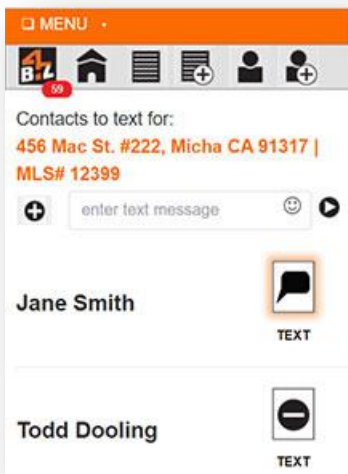
From this detailed unbridged communication view above, you can **play your audio** and **download it** locally as well from the play controls, clicking the 3 vertical dots on the right side of the player:



Make a call:

Click a **phone**  icon when available, then select the contact and their contact number by clicking on the **phone**  icon associated with the contact and phone number you want, followed by your preferred callback number. The PBX will first call your selected phone number, and you will recognize the toll free number. After you answer it, the PBX then calls the contact's number you selected. These phone numbers be changed by clicking the contact icon, then click the edit pencil icon.




Send a text:





Click any **text**  icon to reach the above screen, select your contact(s) or contact group(s) to text by clicking a **text**  that will turn into a circle(-) when selected, and compose a text message that can include attachments. That attachment limit is 5MB, and generally email is a better option for sending multiple and / or larger attachments.

Send an email (new, reply & forward):



New email - Click any **email**  icon, then select your contact(s) or contact group(s) to email. Next click the **open button** in the upper right corner. This triggers your favorite / default email application to open. Create and send.

Reply to an email – Click any email **reply**  icon (only available from the detailed communication view). Then select your contact(s) or contact group(s) to email. For best practice and to avoid SPAM filters, at least one contact selected should be a TO address. Next, click the **open button** in the upper right corner. Create and send.

Forward an email – Click any email **forward**  icon (only available from the detailed unabridged communication view). Then select your contact(s) or contact group(s) to email. Enter an optional message and send. This function does not open your default email application like the new / reply icons and is performed from the app itself. Naturally if you have an email from the 4 BIZ App that was relayed, you can also use your preferred email application to handle it if you do not want to forward it from the 4 BIZ App.

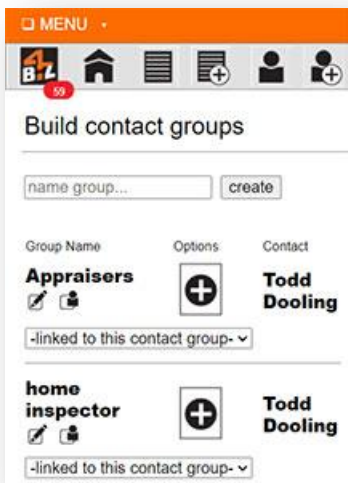
Important - Forwarding options are only available to team / staff with level 3 privileges (full access). No access levels allow them to forward full length phone calls as these do not appear in their timelines, regardless of privileges. However, VM's (voice messages) do appear if they have been granted access to them and can be forwarded by them.

Important - Do not remove the routing code when included. It will be automatically deleted prior to issuing a copy to your contact(s). (i.e. ROUTING-DATA: XXXX)

Creating contact groups:



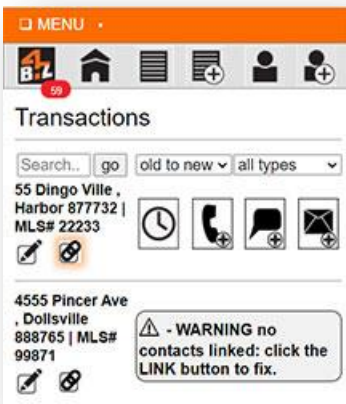
Click the highlighted contact group icon.



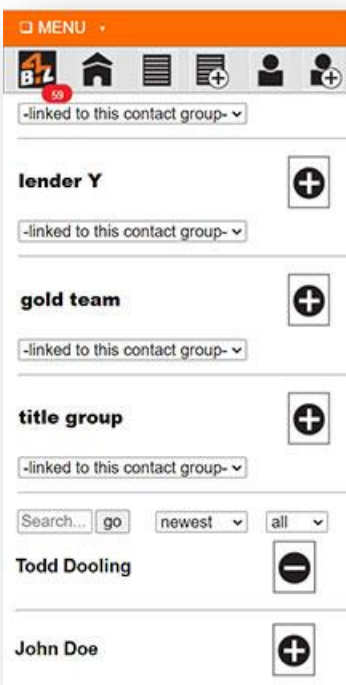
From here (the above screenshot) you can:

- Create new groups.
- Add this contact to one or more groups by using the (+) & (-) buttons.
- Use the (read only) dropdown menu at the top as a visual aid / quick reference to see the group the contact is linked to too.
- Click the edit (pencil icon) to rename a contact group.
- Click the contact icon to return to the root contact page.

Link contacts and groups to a transaction:



First, click the highlighted link icon shown above. (Notice the warning provided when contact(s) are not linked to a transaction created, and communications will not be archived until they are.)

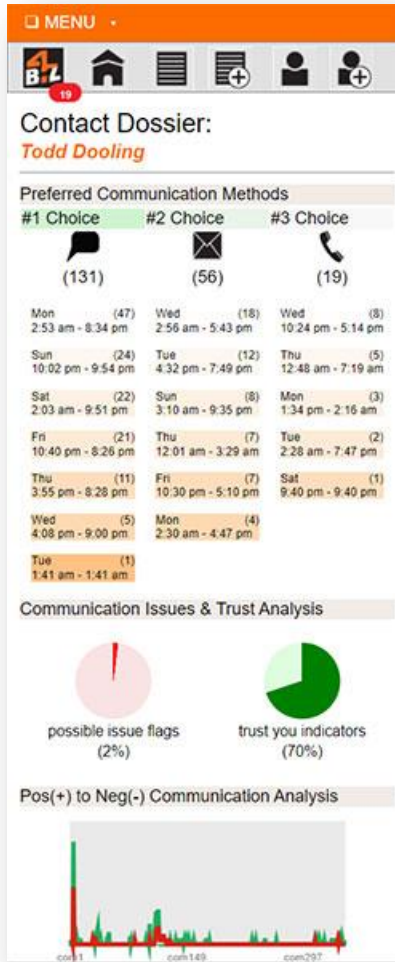


Next, from the above screenshot, click the (+) & (-) icons to add contacts or groups (linking them) to the transaction.

Note – In the above screenshot, depending on the amount of contact groups you have, you may need to scroll down to get to your list of individual contacts. Your sorting preference are saved, and you may

want to sort your individual contacts by “newest” first to expedite linking those you just entered into the 4 BIZ App.

Contact dossier:



Preferred communication methods: This report displays each method of communication your contact uses from first to last choice. While the image icons are indicative of the communication method (i.e. voice, text, email), the number within the parenthesis is the actual number of times it was used.

For example, (131) denotes that text messaging was the contacts first choice, as it was employed 131 times, whereas email was the second choice as it was used (56) times and the phone was third choice at (19) times.

To provide additional insight into the best day and time range to perform a given communication method, a list is provided below for each communication type. It further breaks down the time ranges the contact performed them in correlation to the day of the week, including the number of communications made from highest to lowest per day.

For example, in regards to email on Tue (12) emails occurred within the time range of 4:12pm – 7:49pm.

So if you want to schedule a phone meeting, you could block out a tentative time range based on the data provided and then confirm the exact time with your contact.

If you want to send an email or text message to the contact when they are likely to be most receptive / responsive, this same data can be applied.

Note – All of the reporting data is fluid, and as more communications are made, more data becomes available. This applies to all the reporting that can be retrieved from this page. All of it is updated automatically as more data becomes available to be processed.

Possible issue flags, is representative of the percentage of possible high priority situations that were derived from (negative) sentiment analysis. This report analyzes the total communications that were

performed with a contact and then creates a percentage pie chart based on the actual number of communications that triggered a negative sentiment analysis report.

These negative flagged communications are also visible in the communication timeline and contain a fire icon under flags, plus you should have received a text message alert when they were flagged. To locate these in a cluster, simply use the < Flags > sort arrows, and these specific communications are then sorted and easily accessed in the communication timeline.

Trust you indicators are representative of the percentage of trust related (positive) sentiment queues. As more trust indicators become present from new communications, the positive trust percentage increases. If negative sentiment (possible high priority communications) are flagged this lowers the overall percentage of trust.

Pos(+) to Neg(-) Analysis shows a line graph exemplifying the difference between these sentiment driven ratings (positive to negative queues per communication), and can be useful to correlate what caused both positive and negative spikes.

More features are set to be released in future versions in regards to this reporting suite.

Sort functions:

You will notice other functions that are intuitive and common, like the ability to sort and search, and these do not require a detailed explanation.

Search functions in the App:



You can search by clicking the magnify button (highlighted above) when applicable.

Advance Filing Options



When you expand a communication to reveal all functions, you now have the option to move a communication to a different transaction, or make a copy (leaving the original) and creating a duplication attached to another transaction. For example, the system incorrectly attached a communication to the wrong transaction. Move it manually by selecting the appropriate (category) /transaction from the dropdown, then click the move communication button so it is relocated to the transaction you deem most appropriate. In some instances a communication may have discussed more than one transaction running, so you can duplicate it and attach it to other transactions as well by selecting the (category) /transaction from the dropdown, then click the make copy button.

Search protocol to filter 4 BIZ App communications from your native email application:

When you relay copies of communications to your email application, these email copies can be both searched / filtered by transaction name and / or the type of communication they originated from.

For example you have a transaction named “456 Mac St. #222 Micha OR MLS# 12399”. If you were to paste this into your email search box, or a portion of this transaction name like “456 Mac St. #222 Micha” or “MLS# 12399”, your email application would only show communications associated with this transaction.

To filter further by a specific communication type for this transaction, here are 4 corresponding search term examples that could be abridged as well:

1. 456 Mac St. #222 Micha OR MLS# 12399 – Email
2. 456 Mac St. #222 Micha OR MLS# 12399 – Text
3. 456 Mac St. #222 Micha OR MLS# 12399 – Voice
4. 456 Mac St. #222 Micha OR MLS# 12399 – VM

2 or more independent subscribers collaborating with the 4 BIZ App:

For example, when 2 independent subscribers (i.e. – service providers / non-affiliated real estate agents) are involved in the same transaction (in this example one being a buyer’s agent and the other a seller’s agent) both would normally set up the transaction in their own respective 4 BIZ App account.

In order to capture communications between agents as explained within, both agents would setup the other agent as a contact and then link them to their transaction.

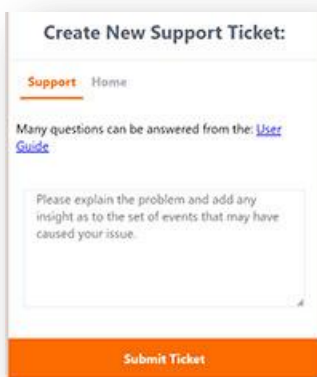
The 4 BIZ App has been automated to automatically identify when one or more service providers involved in the same transaction are also subscribers, assuming the steps were initiated in the paragraph above. The transaction part of the match in this instance is made by cross referencing the MLS#, so make sure to enter this correctly when setting up the transaction.

This means, if subscriber (Agent A) were to send a text message, email or make a phone call using the 4 BIZ App (or in the case of email also when using their own native application) to (Agent B) in regards to a specific transaction they are both involved in, the 4 BIZ App would add this communication to the timeline of (Agent B) as well as the timeline of (Agent A).

Furthermore, it would check the preferences set by (Agent B) and follow them in regards to relaying copies to their email, including following their preferences set in regards to relaying email copies to their team / staff as well.

Support Ticket System

From menu->support, create a ticket:



The screenshot shows a web form titled "Create New Support Ticket:". At the top, there are two tabs: "Support" (which is active and underlined) and "Home". Below the tabs, there is a line of text: "Many questions can be answered from the: [User Guide](#)". Underneath this is a large text input area with a placeholder text: "Please explain the problem and add any insight as to the set of events that may have caused your issue.". At the bottom of the form is a prominent orange button labeled "Submit Ticket".

Accessing the 4 BIZ App in the browser: The easiest way, (especially on mobile devices) is to click the login hyperlink you received in your email application directly from your mobile device's email application. Then bookmark it for fast future access.

Naturally this works on your desktop or laptop computer as well. **Note** - on desktop or laptop computer web browsers you can also type in the website address directly (i.e. <https://4bizapp.com/app/>) into the browser and gain direct access to the website.

Whereas mobile devices generally force you to a search engine page and don't always display the website you were trying to reach if they are not a paid advertiser of the search engine, or have adequate rankings.

So to avoid being forced into a search engine page on your mobile device, click the login hyperlink from the mobile device's email application. This method forces the browser to open to the correct website you wanted to reach, bypassing being forced into a search engine page.

Finally, keep a window or tab open in the browser to the 4 BIZ App, and you will always have quick access to all of your communications.