4BIZapp USER GUIDE

Getting Started

The 4BIZapp 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 4BIZapp to initiate calls with contacts. Using the 4BIZapp to initiate calls allows your recorded calls to be properly linked to their associated transaction(s). When using the 4BIZapp to make a call to a contact, a call back occurs (where the system calls you first). Answer this call. 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 connect you to your contact's number you selected (i.e. your contact's home, office mobile, etc.). This all occurs very quickly. Remember to add your vCard you receive with all your 4BIZapp numbers so you recognize them. **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 also gain all of 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 or other text capable 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 again, get all the app's benefits.
3. **Do not set up your 4BIZapp 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 4BIZapp assigned email address to CC / BCC copies, like electronic documents, include a subject that is recognized as part of the transaction.** This is explained in more detail further.

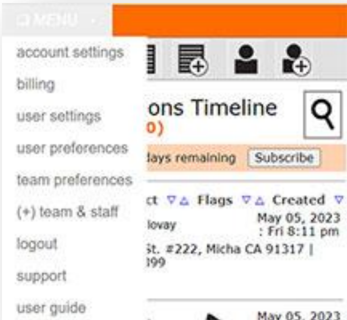
Navigation (The 8 key icons):

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 <u>most importantly</u> 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 that also includes your BAC information for other agents to access using 4BIZapp. 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 4BIZapp and in an email subject line: 456 Mac St. #222, Micha CA 91317 | MLS# 12399 **Important** – When using your assigned email address (i.e. – janesmith@4bizapp.com) to CC or BCC copies of e-docs into the 4BIZapp, you must include either the entire naming schema, or at least enough of a sufficient subject match to allow the 4BIZapp 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 contact's *Preferred Communications*, High Priority *Communications*, *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 4BIZapp. I**mportant** - you have the option to override / manually change these recording settings from the Contacts (icon)->Edit icon (pencil) that corresponds with the desired contact.
7. The next icon (BAC search) allows you quick access to all BAC information a listing agent using 4BIZapp may have included. Enter the MLS number (the way it is formatted on your MLS system) and select your desired state. You can call, text or email the listing agent right from this page.
8. The next icon (BAC Contact+) **provides you the opportunity to quickly invite any broker / agent into the 4BIZapp with up to a 365 free trial**. Share with an invitee all the benefits you enjoy by quickly adding their name, mobile and text into 4BIZapp. Manual invitation adds them as a contact into your account contact list, and sends them their free trial with their account already setup for them. Now when you communicate amongst yourselves using 4BIZapp, you can catalog your communications specific to any transactions you are discussing / involved in.

Note: BAC (#7,#8) is a new function, and may not be featured on all images, but it is now included for every user (free or paid).

Navigation Menu (9 dropdown options)



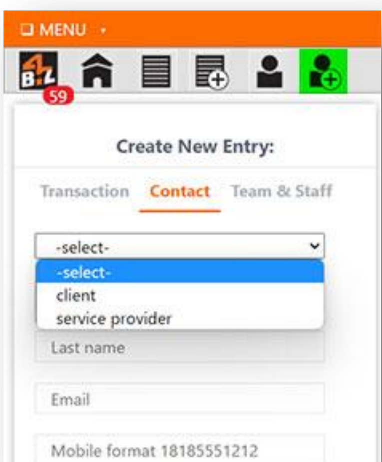
1. **Account settings** – Provides system information, like your assigned toll free number and email.
2. **Billing** – See your current month's usage in correlation to your current plan limits. See the previous month's usage. Update your Credit Card. Cancel your subscription.
3. **User settings** - Edit 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 / high 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 "DISABLE ALERTS". **Important** - You can modify your sentiment analysis sensitivity from here as well. This setting is responsible for triggering when communications are deemed high priority. 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, and consent to this when using 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 4BIZapp. Use the tooltips to learn more about various levels. **Important** – After adding a team member using *Menu->(*) team & staff*, you can temporarily or permanently block their access to the app by selecting *Block Team Member* from the permissions dropdown. Text notifications that alert team of new communications can be set in *Menu->User Preferences* under the heading *Team Notifications & Delivery*. By default it is set to "ON" for both text and email. **Note** – By default at *Standard Team Member* can read and

respond to text, emails, read the transcription and / or playback of voice messages, plus initiate communications. They do not have administrative permissions. A *Super Team Member* has administrative permissions to view call recordings and they can add / edit team members. They cannot update credit cards or cancel a subscription. Only the primary subscriber can perform this.

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 4BIZapp) 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(s). 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 4BIZapp toll free number.



It is important to correctly define the contact type when adding a new contact. This controls the correct recording options and prompts based on the contact type selected, and this will also 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 and your transaction email address.

This process includes automatically setting up B2B users you are working with into your transaction, and logging joint communications into your respective timelines.

The assigned toll free number your contacts need to use is located in Menu->Account Settings. Your vCard also contains another toll free number only used by the system when you make outbound calls to contacts from the app, in order to setup the recording process and so you recognize it.

The phone / voice recording:

The 4BIZapp 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 4BIZapp provides each contact's visual recording preference setting as a prompt, on the app page where you select the contact you want to call. This functionality should be used to educate yourself prior to initiating the call, so understand whether your contact is aware of the recording taking place, beep tones are required for your outbound call to record it (or you can opt not to record it), or whether recording consent was already granted by the contact, or if geo location has any effect on the recording. This setting first relies on the accuracy of the resident state you define to your Menu->User Setting and then each contact you add to your contact list. So it is important keep them updated, for example if a contact moves to a different state. Additionally as mentioned previously, whether they a contact is B2B or B2C. These recording permissions can also be affected by the geo location of an app user and their contact when the calls are initiated.

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

- <u>contact chooses to record</u> - **This is the default behavior** (and you can change the default in Menu->user preferences). The 4BIZapp gives your B2C (i.e. clients / customers) the opportunity to opt into recording all calls in either direction, (or decline recording all calls). Allowing the contact to provide consent 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 select 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 played prior to connecting them to you, or beeps / tones when you call them.
- <u>record all calls</u> – 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 one 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 with prompts before you select a contact to call.

- 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 where one contact may be in a one party consent state and the other in a two party consent state) the call may need to have the legally required tones / beeps played to allow the call to be recorded. The system alerts you to this by visual prompt and provides various options for you to choose from, like accept or deny recording. **Note** – If your contact asks what the tones / beeps are for (which are mild, sporadically played, and not too intrusive), 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.

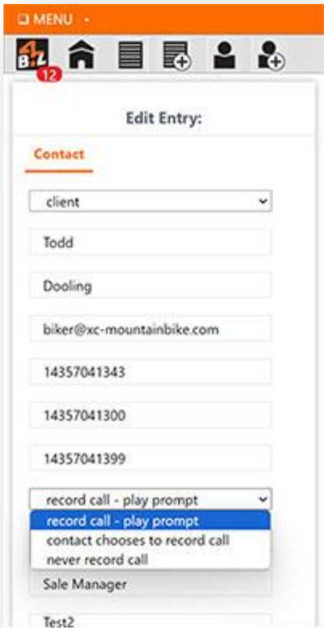
Note - If a contact had previously accepted all recordings from a "contact chooses to record" option, you should not change it, as changing it back will then require their approval again. However if they ask you to disable all recordings later, you should comply with their request.

Important - Always use the 4BIZapp assigned number to call contacts even if they have (or you have) denied all call recordings in order to ensure your contacts still use your 4BIZapp assigned free number to text message you. This allows your transaction related text messages to get properly logged into your timelines, as text messages do not require any consent to archive.

B2B contacts like service providers do not have assignable recording options because they must grant their recording consent in order to use the app.

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 4BIZapp only has to save your (B2C) contact / client's recording preferences one time when the setting: <u>contact chooses to record</u> is applied, and then every subsequent time they call you, they are automatically recognized and are never bothered with this process again. For those who are qualified to receive an email of the call by mp3 audio file, the process is fully automated.

Note - If a contact hangs up when the setting: <u>contact chooses to record</u> 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.

Note – Contacts can also automatically grant consent by clicking an acceptance link from their introduction email, or introduction text where they receive your updated vCard for transaction usage.

<u>B2B Automation</u>

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 4BIZapp email and getting the most out of it:

The 4BIZapp's assigned email is a virtual relay, a practice employed by many platforms and you likely already understand this concept. That said, you do not set up your assigned 4BIZapp email as a traditional POP or IMAP email where an account is created with all your folders and messages.

Best practices: <u>Do not alter the subject line</u>. <u>Do not remove any Routing: data codes</u> within the message body, as these are automatically removed after processing, just prior to delivery.

When your contacts reply back to any transaction email in the chain, these communications will be captured into the 4BIZapp database, available in the timeline. Other methods are in place as well if your contact doesn't reply to an existing email, and drafts a new email, to automatically catalog it into the transaction.

You (the subscriber) need to always use the app to initiate emails (new, forward or reply). This opens your existing email program, so you can use the editor you are comfortable with, yet it ensures proper routing and transaction cataloging.

If you want to save copies of electronically signed documents / contracts into the 4BIZapp timeline, simply CC or BCC your assigned 4BIZapp email address. When performing this, you must include a subject 4BIZapp recognizes, either the entire transaction naming schema created by the 4BIZapp, or at least a sufficient amount to create an email <u>Subject match</u>. This match allows the 4BIZapp to properly catalog this email into the correct transaction. You need to either type or paste your 4BIZapp transaction subject into your electronic document signing program's subject line, or electronic document signing programs will makes their own default subject line that might not create a proper subject match for the 4BIZapp. All these providers allow you to edit the subject line. In the even the 4BIZapp can't make a transaction match, it will text you to clarify.

Here are some shortened examples that would be acceptable subject lines for matching from you 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 – Don't add any commas, periods or punctuation in the subject line as email providers often mark such emails as SPAM.

Important – When sharing / forwarding emails the 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 from your timeline to your email address you registered with.

Emailing using the 4BIZapp

Forwarding emails: You can forward any communication including its attachments to both individual contacts, contact groups and combinations thereof. If an email is sent to more than one contact, whether part of a contact group or not, all recipients are listed in the email body so each contact understand who is receiving copies, including on replies.

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 Emails & Reply Emails: Using the 4BIZapp for emails, automatically sets up the subject with the appropriate transaction naming, 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 or remove this embedded routing data which is removed prior to sending it your contacts. 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 – The 4BIZapp deletes everything after the routing-data added, including the routing-data before sending it off to the contacts selected. So if you have a signature that appears below the routing-data, you can simply cut the routing-data, and paste it below your signature or the opposite and just cut your signature and paste it above the routing code to ensure the signature shows up.

Note – If you add a contact group, and then also add that same contact individually who is also in a contact group you added, the contact would receive two copies of the same email.

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 a contact group and removed her, and a contact were to reply back to an email where she was originally included, she would not receive a copy after being deleted from the contact group.

Using Timelines & Communication Functions:

From multiple locations, like the timeline, the contacts and the transaction page, easily 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 within the timeline:

The time icon takes you to the 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, new 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, reply 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, forward 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 yourself, 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.

More options are available by clicking an abridged communication (click to expand >>) in the timeline that then opens up the detailed unabridged expansion window. **Note** - the orange highlighted area appears when you mouse over message area and click to expand>>:

The image below is the expanded detailed communication view, after clicking on the orange highlighted message area / click to expand >>:

Unabridged 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 communications that will contain a fire icon.

Detailed Sentiment Analysis: Reporting details as they pertain to a specific / itemized communication. This option may not be available in all versions, or reserved for future release.

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.

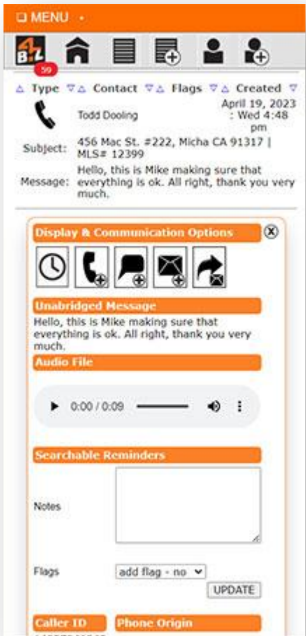
Attachments: There are 3 ways to retrieve attachments. First ,from the detailed unabridged communication view in the timeline and contained in the bottom of the expansion window. Second, click the **paper clip icon** available in the top pane of the transaction communication timeline. This method organizes every attachment in the transaction, like text, email, documents, audio from phone calls and video from video calls / meetings. Third, from within the transaction timeline, click a paper click icon on any itemized communication and this will display every attachments received from the contact linked to the communication you selected.

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 was 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.

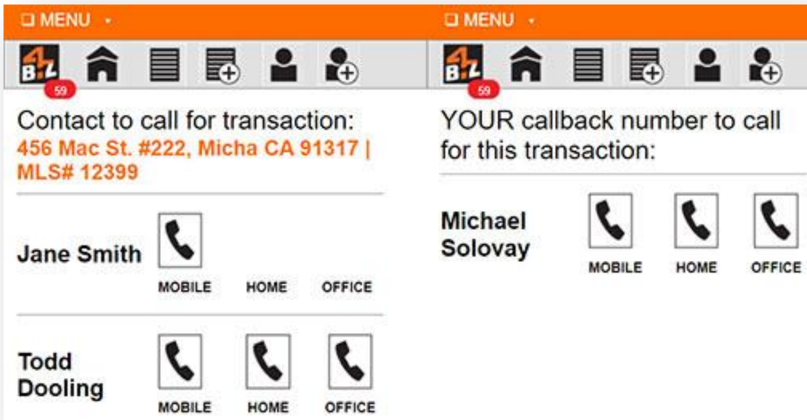
The above is a **detailed unabridged communication view** that contains an attachment. Notice the small paper clip icon (representing attachments) from the abridged message area.



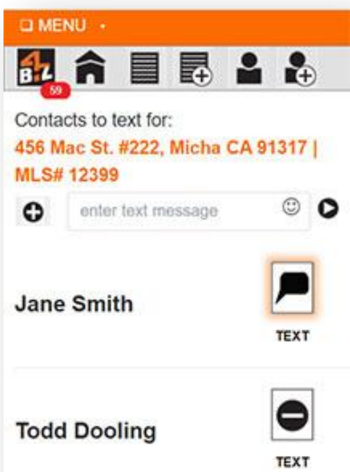
From this detailed unabridged communication view above, you can **play your audio** and **download it** locally as well from the play controls, clicking the 3 vertical dots on the right side of the player:

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 system will first call your selected phone number, and you will recognize the toll free number if you added your vCard. After you answer it, the system then calls the contact's number you selected. Contact's phone numbers be changed by clicking the contact icon, then click the edit pencil icon.



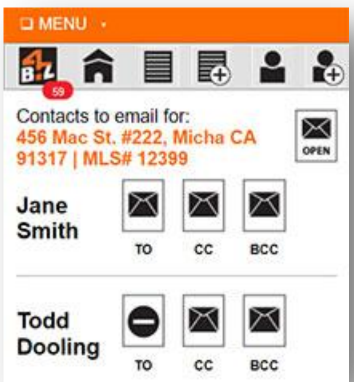
Send a text:



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.

Important - When you add more than one individual and / or contact group(s) or combinations thereof to a text message, the text message will include all the recipients copied in the text message body, so all parties are aware of who is involved. When any B2C (i.e. client) contact replies back to this text (as you are accustom to when using text contact groups), all recipients are automatically texted. A simple option exists as well for individual B2C contacts to bypass the entire group, and just text you the subscriber. This will alert you in your text so you are aware, only you received it. The a last settings used by you or a B2C contact are saved and applied. So if you texted Jane Smith (a B2C client) in a group, and then 20 minutes later texted here individually, when she replies back, the system follows that last protocol set and will only text you back. B2B contacts (i.e. service providers) added into a text message don't apply, as they use the app like you and select who they want added into their text message. This is actually straight forward and becomes intuitive when using the app. For example, in most instances a group would include two B2C contacts, like a husband and wife, or two partners that want to be included on every text message, and they would not bypass the group, even though the option exists.

Send an email (new, reply & forward):



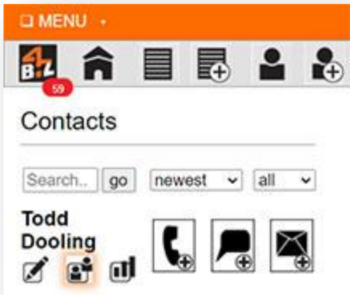
New email - Click any **email** icon, then select any combination of contact(s) or contact group(s) to email. Next click the **open button** in the upper right corner. This triggers you favorite / default email application to open. Create and send.

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. Next, click the **open button** in the upper right corner. Create and send.

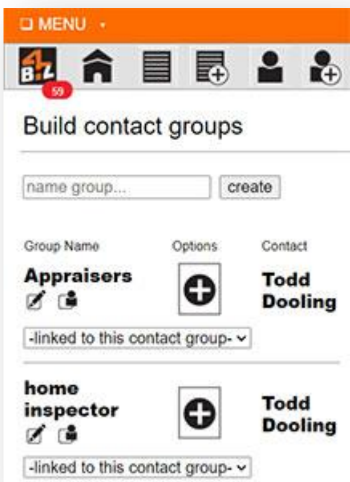
Forward an email – Click any email **forward** icon (only available from the detailed unabridged communication view). Then select your contact(s) or contact group(s) to email. Enter an optional message and send. This function <u>does not</u> open your default email application like the new / reply icons and is performed from the app itself.

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:



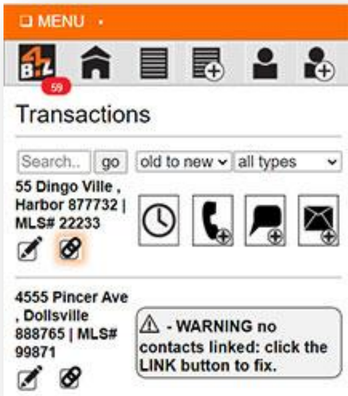
Click the highlighted contact group icon.



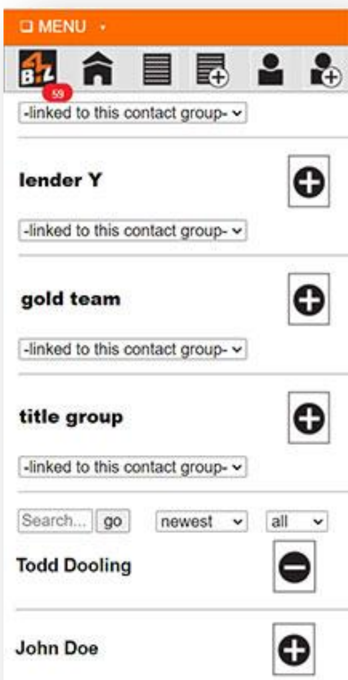
From here (the above screenshot) you can:

- 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 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:



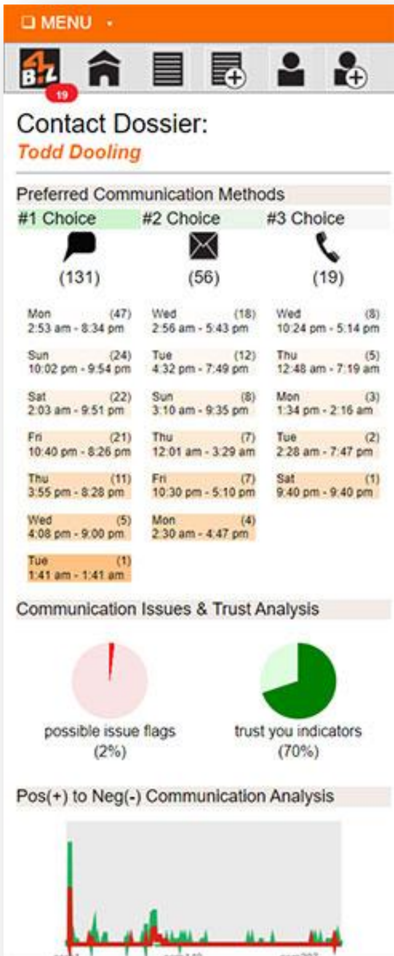
First, click the highlighted link icon shown above. (Notice the warning provided when contact(s) are not linked to a transaction created, and communications will not be archived until they are.)



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 4BIZapp.

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.

High priority comms, is representative of the percentage of possible high priority situations that were derived from 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 high priority sentiment analysis occurrences.

These high priority 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, if you had these permissions turned on.   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 sentiment queues. As more trust data becomes available from new communications, the trust percentage automatically is adjusted.

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:

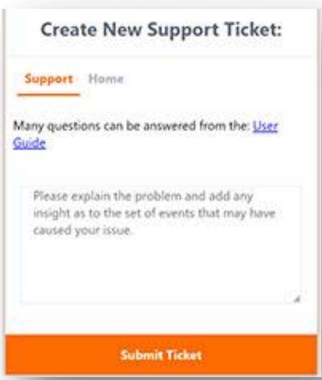
You can search by clicking the magnify button (highlighted above) when applicable.

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) to create a duplicate 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.

Support Ticket System

From menu->support, create a ticket:



Accessing the 4BIZapp in the browser: The easiest, fastest way is to simply bookmark the login page you received in your welcome email using your laptop or desktop PC. From you mobile device, simply go to the login page and use your mobile browser to **add (+) page to**, to your main menu screen. This will create a 4BIZapp icon, just like an app icon for quick access.

4BIZapp Trial Invitation Programs: 4BIZapp users (both paid subscribers and active trial users) may invite qualified contacts (that are service providers) to use the 4BIZapp for a fully unlocked trial. **Note**: There is no need to invite contacts that are your clients (i.e. your sellers or buyers) because they always use the system for free, and do not need to use the app at all, whereas service providers do use the app and thus receive all the benefits of its usage.

Service providers that qualify for a trial must never have been a paid subscriber or previously received access to a trial program. 4BIZapp automatically checks each service provider's qualification status to see if they are eligible for trial usage, assuming there is an active trial program running.

4BIZapp Trial Invitation Programs:

1. **BAC+ Trial Invitation**: Use the BAC+ Icon to add a service provider contact. This would typically be performed if you want to grant access (including automated account setup with login credentials) to any service provider, including office members, other brokers / agents in other offices in your state or other states, title reps, etc. so they can add their listings with their BAC data, and / or to retrieve BAC data from other participating 4BIZapp members. This invitation option should only be used for service providers that are not actively involved in a transaction with you, as the following invitation method explained below has greater advantages for those participating in your transaction. **Note**: For office members that may be considered shared staff or team members, (i.e. a transaction coordinator or unlicensed assistant), they can also be added as a team member to a primary account to gain access to BAC data. Adding them via this BAC+ method would create their own primary account, and while this is permitted for licensed service providers, it may not make the most sense from a workflow standpoint.
2. **Linking a Service Provider contact to your Transaction**: *<u>This transaction linking function must always be performed for every 4BIZapp contact involved in a transaction</u>*. In order to increase participation in the transaction with those service providers involved in the transaction that are unfamiliar with the 4BIZapp, this linking operation may grant a trial to the said service provider, including automated account setup with login credentials and transaction setup. **Note**: This process always automates the linked service provider's account by performing transaction setup processes on their end, regardless of whether a trial is granted or not. Thus transaction linking is both required and a critical process that benefits both new users and those who have previously used the 4BIZapp. *<u>These transaction automation processes do not occur if you select the BAC+ invite option for a service provider involved in a transaction with you</u>*. Both new and existing users are notified of account transaction setup when they are linked to a transaction. This may occur by text and / or email. **Important**: For privacy and security purposes, none of your contacts (clients or service providers in any transaction past or present, or those contacts that have never been linked to a transaction in your account) are added into the linked service provider's account. While the transaction is automatically setup for them, ONLY your contact information is setup into their transaction, and this may include any communications that were previously shared between the two of you, assuming they originated from using the 4BIZapp. Any other client or service provider contacts added by the said linked service provider requires them to independently add them on their end, even if you are sharing contacts, for example a title rep, because they have no access to your contacts or any of your account information.

Note: These above invitation programs when authorized (and they are active) are both denoted as a GOLD Trial and are identical in trial terms of usage. Eligible trial users receive the same time duration and tier level of call minutes, texts, emails and storage whether they are invited by BAC+ or from being linked to a transaction. The remaining days in the trial are displayed on the home page of the 4BIZapp. This page displays the communication timeline containing your most recent transaction communications, typically your most frequented page.

Current GOLD Trial Program:

365 Day (1 Year) Trial: This allows for fully unlocked usage of the 4BIZapp during this time period. **Important**: *Usage is unlimited for BAC functionality during the allotted duration, or any other functions that do not consume, call minutes, text messages (SMS or MMS) and emails with contacts, or exceed storage capacity (i.e. communications, attachments etc.)*.

Important: Each month you are granted the following monthly usage limitations shown below and your accumulated communication usage for the previous month resets at the beginning of each new month. This reset does not include your storage limit which may grow incrementally monthly. Should any individual limit be exceeded, (i.e. you exceed email usage) in a given month, paid subscription would be required to continue using the 4BIZapp. If none of the limits are exceeded in a given month, you can enjoy the complete 1 year trial without a paid subscription.

The following allotted limits (as related to using the 4BIZapp for transaction purposes), typically allows for an estimated 5-10 transactions to be completed.

<u>Monthly Communication & Storage Limits:</u>

- 450 Voice Minutes*
- 100 Emails*
- 100 SMS*
- 50 MMS*
- 15GB Storage (This allows for much greater archival capacity then 5-10 transactions and your usage may grow incrementally)

*Your accumulated usage (based on a monthly cycle) resets each new month. The date when your month begins and ends may be based on your billing cycle's new month, determined by the time you began a trial or paid subscription. During your trial, if you exceed any of these limits, a paid subscription would need to be started to continue using the 4BIZapp.

To monitor your usage limits in the 4BIZapp: Click Menu->billing. This is real-time reporting accessible any time.

**All trial programs are subject to change or termination at any time without prior notice.*