WHAT'S NEXT CLIENT PORTAL

Educate and empower your clients through the home buying and selling journey.

NEST REALTY

OVERVIEW

What's Next Client Portal is a digital gateway to a real estate transaction for your clients. You can share contract documents, key dates, timelines, vendors, and relevant insights with your clients. Additionally, you can personalize client messaging and add custom details. Clients can also add in their own milestones for their real estate journey. It's a phenomenal way to earn client confidence, remove some stress, and add to the experience of working with you.

TABLE OF CONTENTS

YOUR TRANSACTION

Once you have your initial transaction established, you can create your Client Portal. Please note, your transaction must meet the three criteria below:

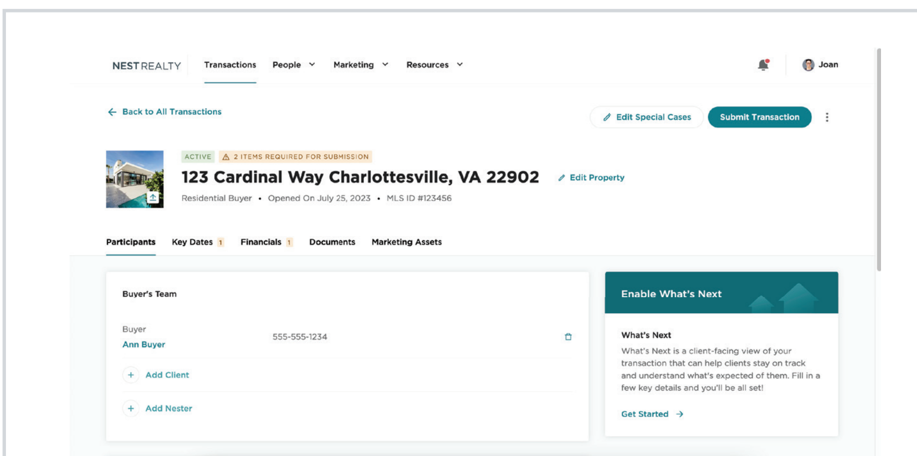
1. Client record contains an email address
2. Transaction contains a property address
3. Certain Key Dates must be populated

In addition, it's smart to have as much information as possible completed within your transaction. We recommend focusing on updating as much information as possible within your Participants, Key Dates, Financials, and Documents tabs before you set up a portal.

For more details on creating and managing a transaction in Envoy, please refer to our Nest U lesson and/or PDF guide.

SET UP A CLIENT PORTAL

On your Transaction Dashboard, when you have selected the 'Participants' tab, you'll see the 'Enable What's Next' box on the right-hand side of the screen.



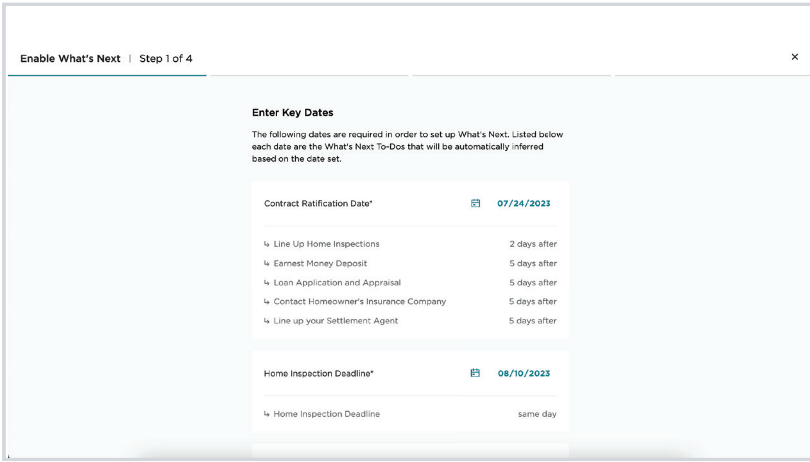
Select *Get Started*.

When you do this, you'll be guided through four (4) educational steps related to What's Next. This steps will give you some recommended guidelines and tips into how to manage your Client Portal.

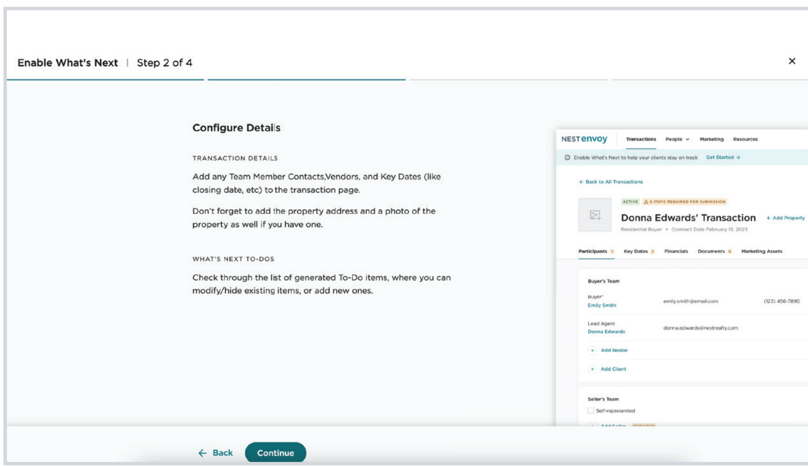
1: Enter Key Dates

This page outlines the specifics of which Key Dates must be completed. In addition, it gives you the breakdown of the default dates/timelines that are assigned to certain 'To Dos' and recommended deadlines.

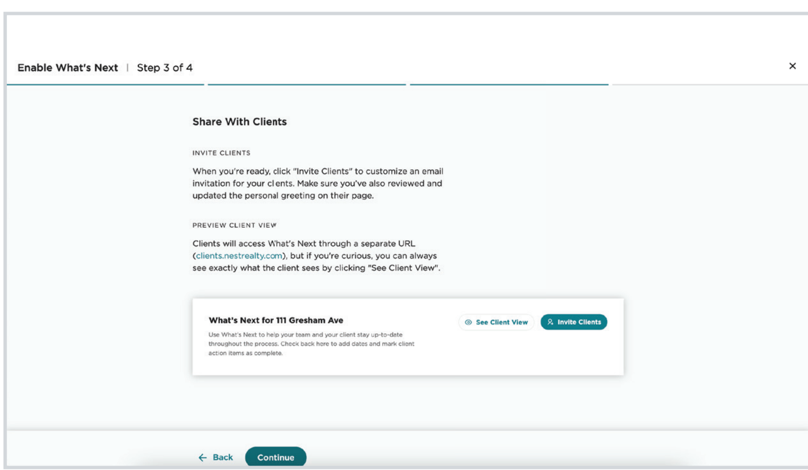
When you are on this page, you can update any Key Dates and those updates will be reflected in your Transaction dashboard.



2: Configure Details

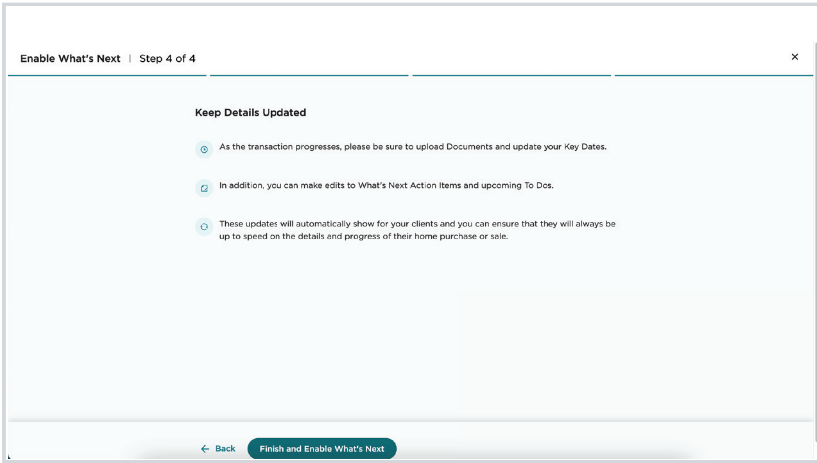


3: Share With Clients



4: Keep Details Updated

Once you have clicked the ‘Finish and Enable What’s Next’, your Client Portal will be established. Please note that your client will not have access until you send the invitation!



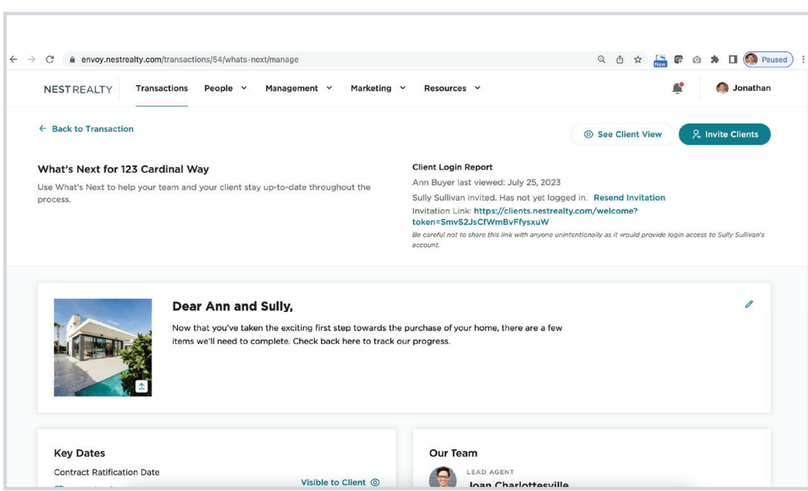
AGENT MANAGEMENT VIEW

Your initial view of What’s Next is the Agent Management View. On this screen, you will see the general overview of the sections and will be able to manage exactly which information your clients will see.

Visibility

Please note that you have the ability to hide or make visible almost all information and details for your clients’ portal.

By clicking the ‘Visible To Client’ icon, you can toggle between making that particular information visible or hidden in your client’s portal.



Some information and documents are defaulted as 'not visible', while most information is defaulted as visible. For example, details like a Commission Disbursement document or a co-op agent would be defaulted as not visible in your client's portal.

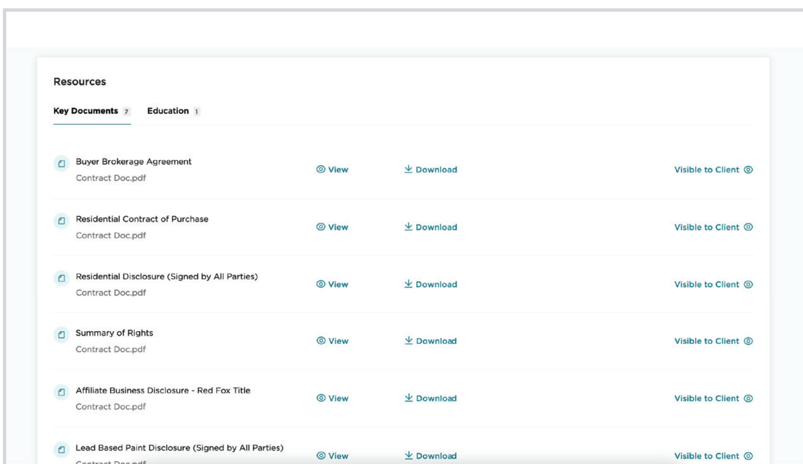
Intro Letter
You can manage the salutation and welcome letter at the top of the screen by clicking the pencil icon.

Key Dates
You can manage the Dates and can manage the 'visibility' of those dates to your client.

Our Team
Your photo, name and contact information is spotlighted at the top of the 'Our Team' section. This information is pulled in from the Marketing Profile of your Envoy account. If there are multiple Nest agents representing your client, you have the ability to choose the 'Lead/Primary Agent' for What's Next in the Transaction Dashboard under the Participants tab.

Other members of the team such as vendors you have added in under the Participants tab of the Transaction Dashboard - are show here.

You can manage the visibility of any team members here.



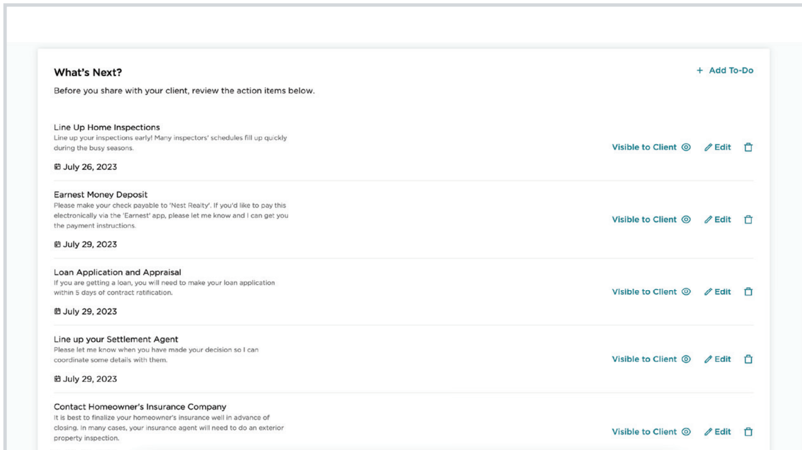
Key Documents
All documents for What's Next are fed in from the Documents tab in the Transaction Dashboard. Your local leadership has tagged these documents as default visible or not visible.

If you added any additional or one-off documents to your Transaction, these are automatically defaulted as not visible. However, you can change the visibility option here.

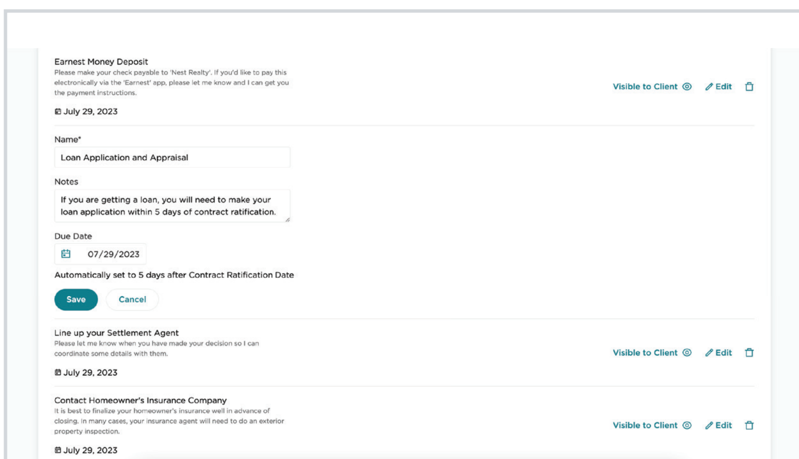
Education

These are documents and information uploaded by your local leadership. At this time, you cannot add additional documents to the Education tab.

If you would like to add any additional documents for your clients, you can do so under the Key Documents tab.



The core of the What's Next Client Portal are the 'To Dos'. These are set as default by your local leadership. You have the ability to manage any of the To Dos on an individual transaction level.



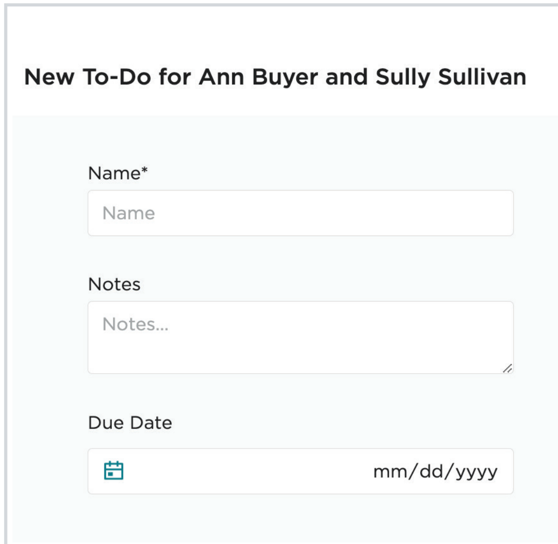
To manage a To Do, click the Edit icon and you can change the Name, Notes, and Due Date. In addition, you will notice that the default Due Date timeline is defined underneath the Due Date (i.e. Automatically set to 5 Days after Contract Ratification Date). You can manage To Do visibility here also.

In addition, if you would like to add more To Dos - maybe something custom to your service offering or specific to this particular transaction - you can select 'Add To Do'.

CLIENT VIEW

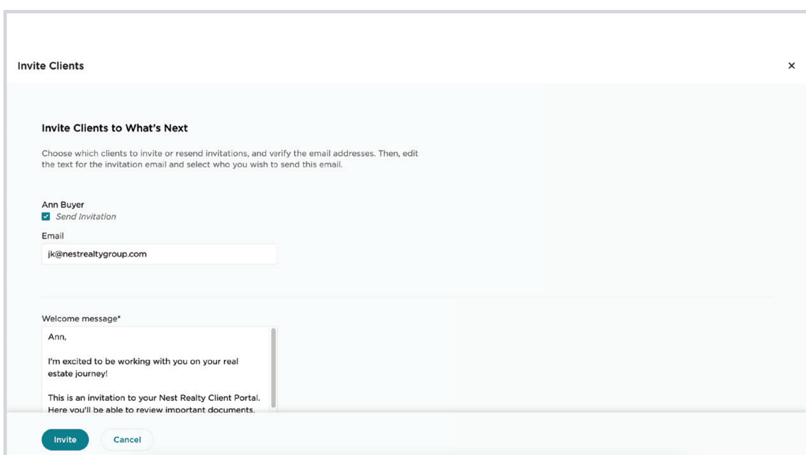
Once you have made all the changes in the Agent Management View, you can select the ‘Client View’ icon and you’ll be taken to a preview of what your clients will see.

We recommend reviewing this before you send your client and invite.



Inviting Your Client

Once you have reviewed the Client View, go back to the Agent Management View and select ‘Invite Clients’. This is located in the upper right hand corner of the screen.

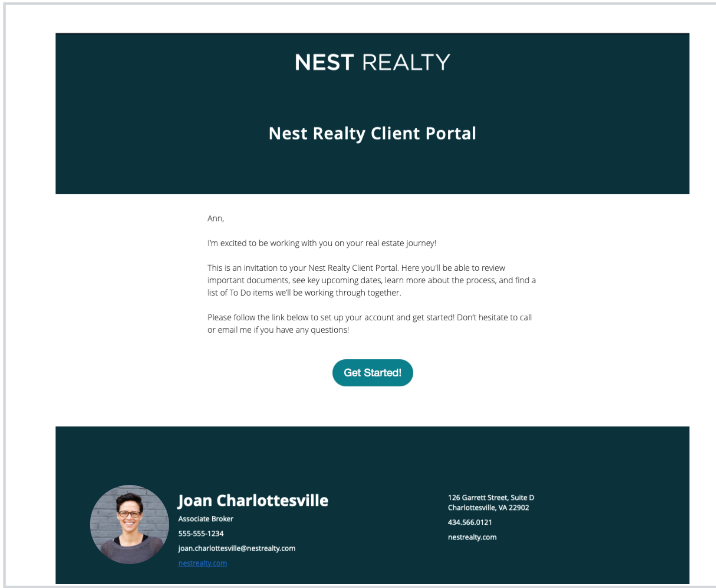


You’ll have the opportunity to double check, or edit their email address, as well as customize the welcome message that will be in the email.

Please note that if you have multiple clients, you can check the box next to ‘Send Invitation’ to choose who you will be sending the invitation to. The boxes are default selected, but you may uncheck one if you do not want to send an invitation to that particular client.

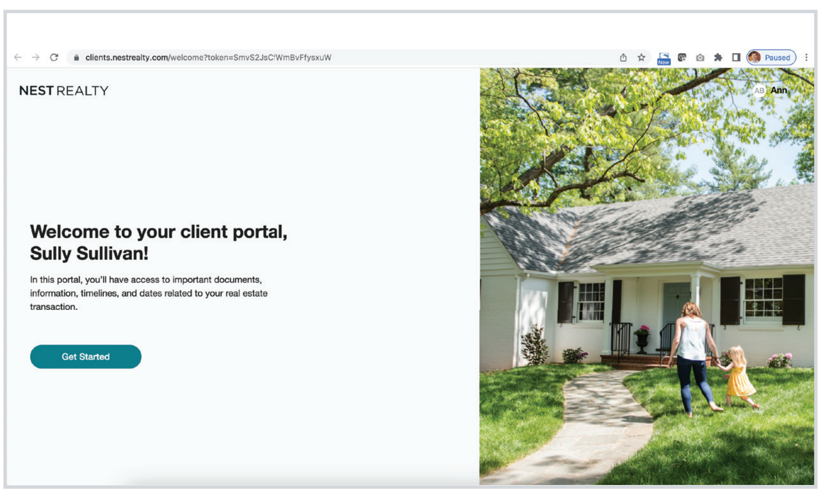
Client Experience

When you invite a client, they will receive an email from you.

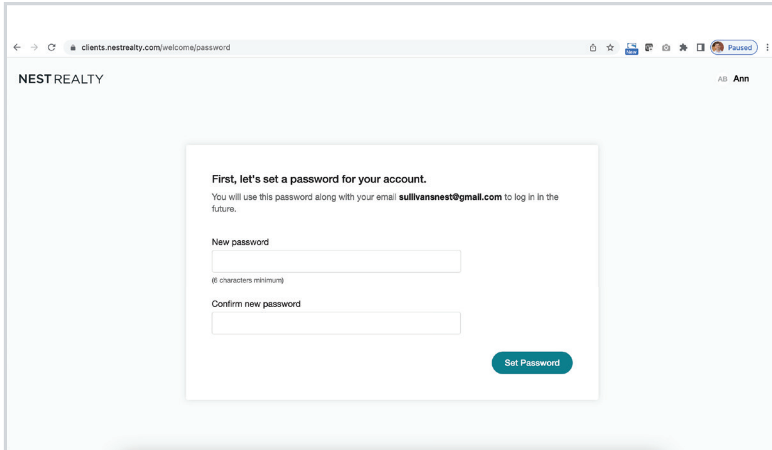


When they select the 'Get Started' button, they'll be taken to a web site to lead them through a very short account set up process.

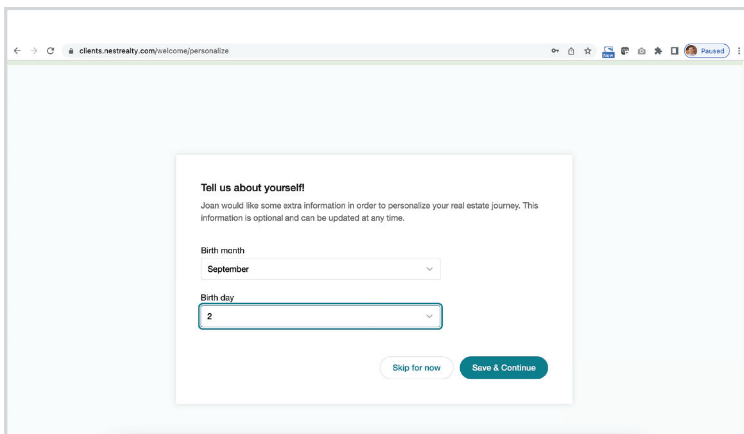
Step 1: Welcome Screen



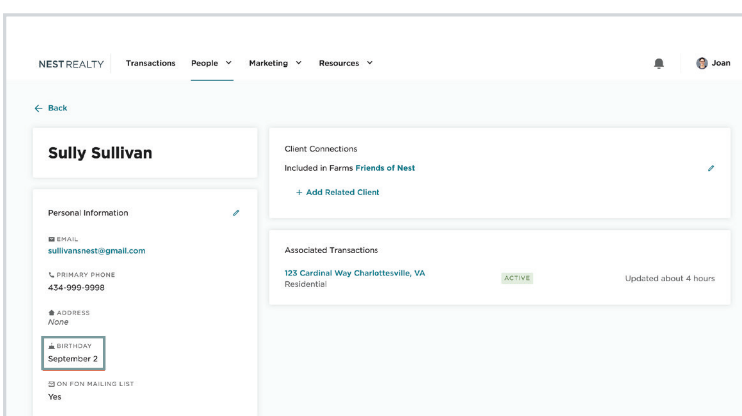
Step 2: Password Set Up



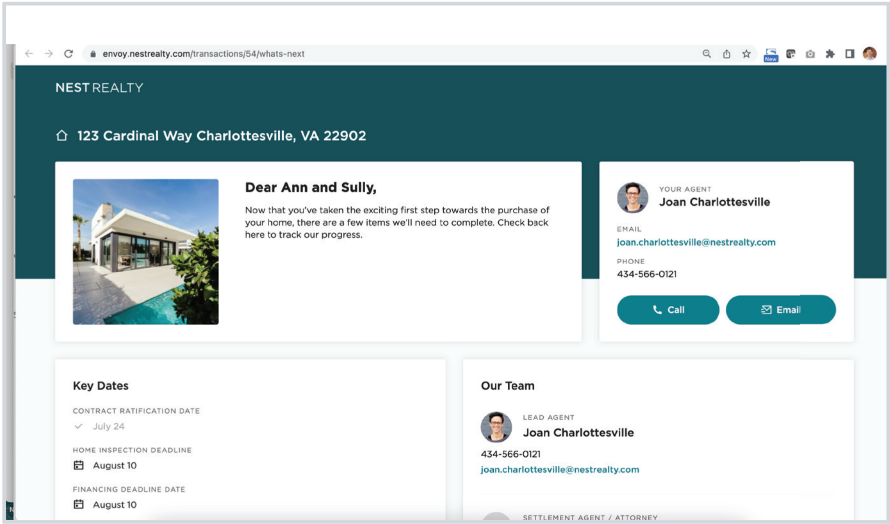
Step 3: Birthday Request



The final step is to request their Birth Month and Birth Day. They can skip this step and move forward into the portal. However, if they do complete this information, it will be dropped into their file in your CRM.



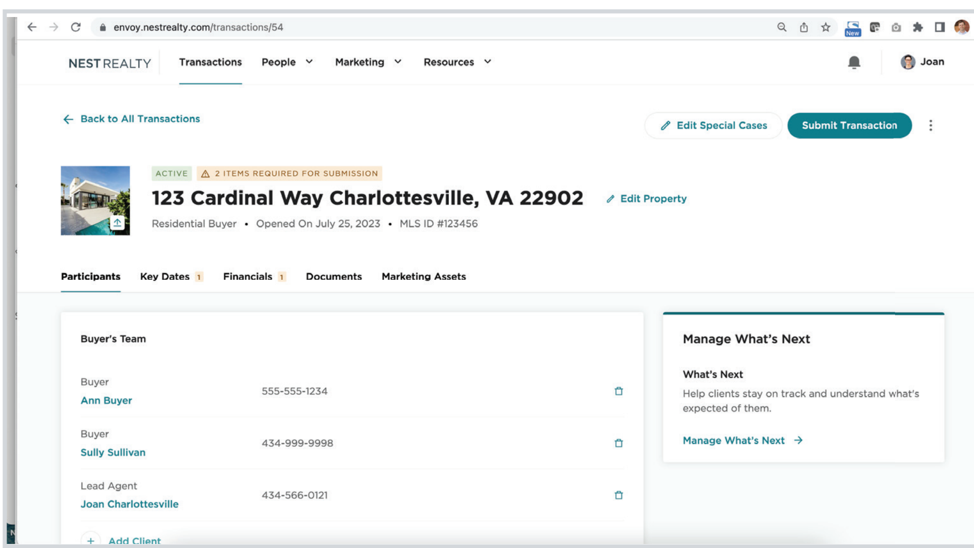
Once they click the ‘Save & Continue’ button, they’ll be taken to their portal.



Managing What’s Next Moving Forward

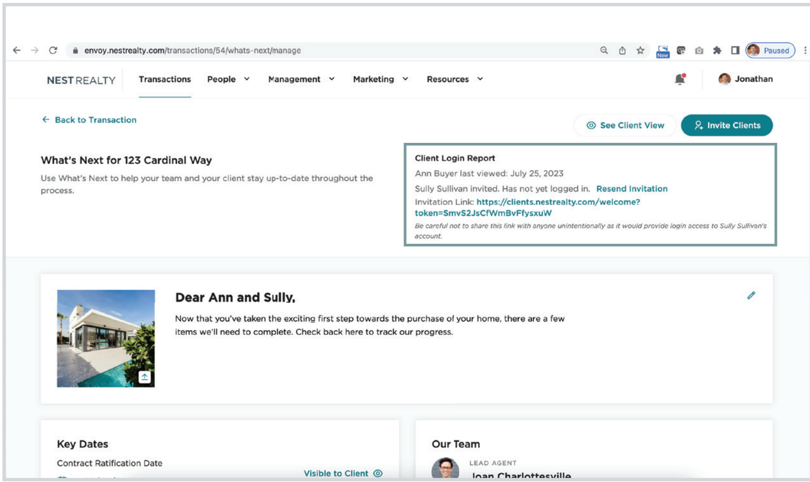
We highly recommend that you continue to manage and monitor your Client Portals throughout the transaction.

To continue the management, go to your Transactions Dashboard and click ‘Manage What’s Next.’ This will bring you back into the Agent Management View.



CLIENT LOGIN REPORT

Once you have sent your invites, you can monitor if your clients have logged in. The Client Login Report is located in the upper right hand corner of the Agent Management View.



If you notice that a client has not logged in or they have not received their invitation email, you can click the 'Resend Invitation' link to send them another invitation.

The Client Login Report also shows the date of the last time your client logged in.