INSURANCE AGENT
MAC 2.0 USER MANUAL

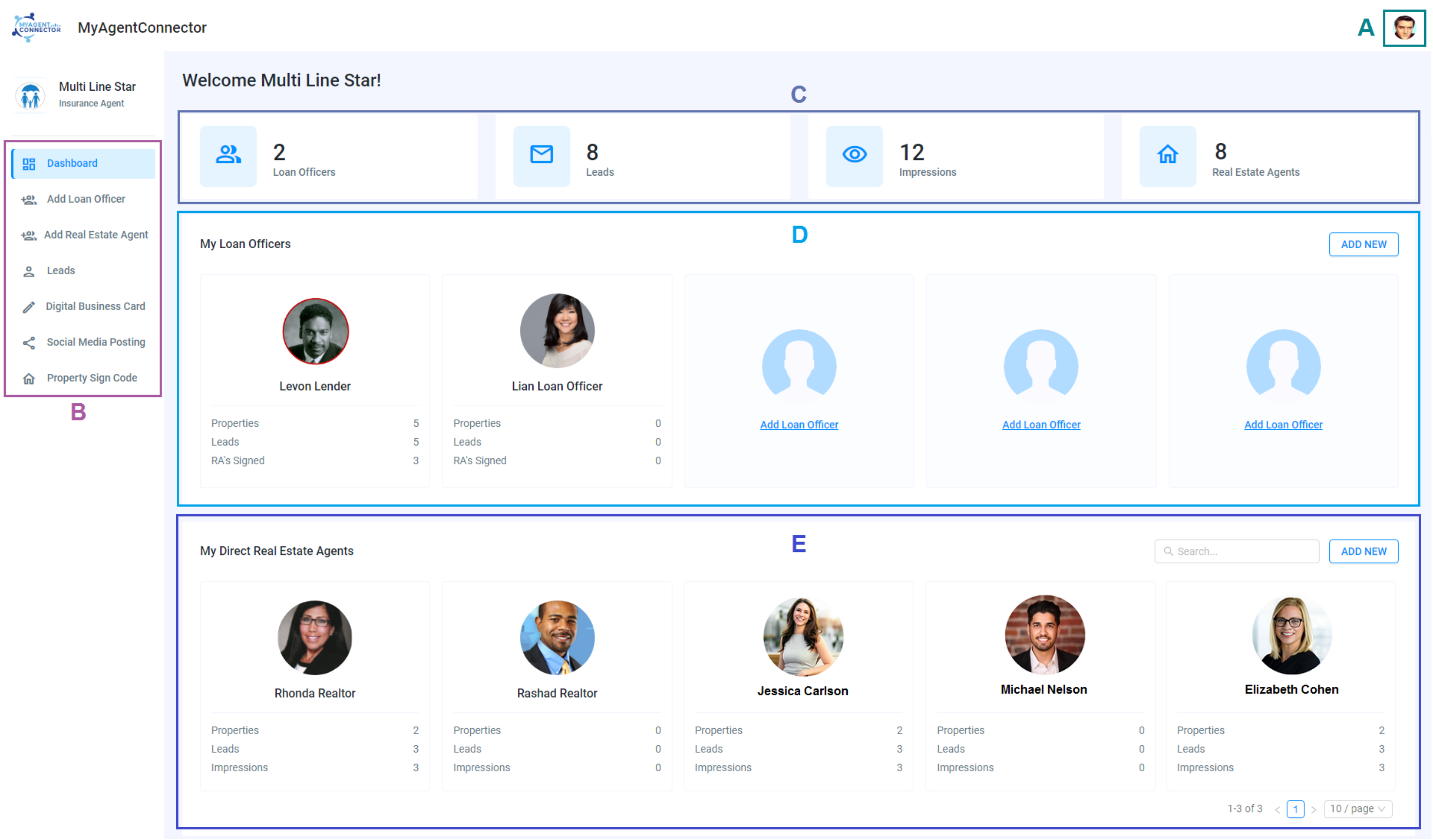
clientrelations@myagentconnector.com | 858-633-2326 | www.myagentconnector.com

Table of Contents

Section 1: Getting Started

Navigating Your Dashboard

The MAC 2.0 dashboard is designed to be straightforward and user friendly. From here you can access your account tools, Loan Officers, and Real Estate Agents.



MAC 2.0 Dashboard Overview:

A. This is where you can edit your profile and log out of your account.
B. The left sidebar is where your account tools and leads are located.
C. These boxes give you a quick glance at your account stats.
D. This where you can view and add your Loan Officers. Click their photo to view their account.
E. This is where you can view and add your Direct Real Estate Agents. Direct Real Estate agents are connected directly to you, without a Loan Officer attached to their account. Click their photo to view their account.

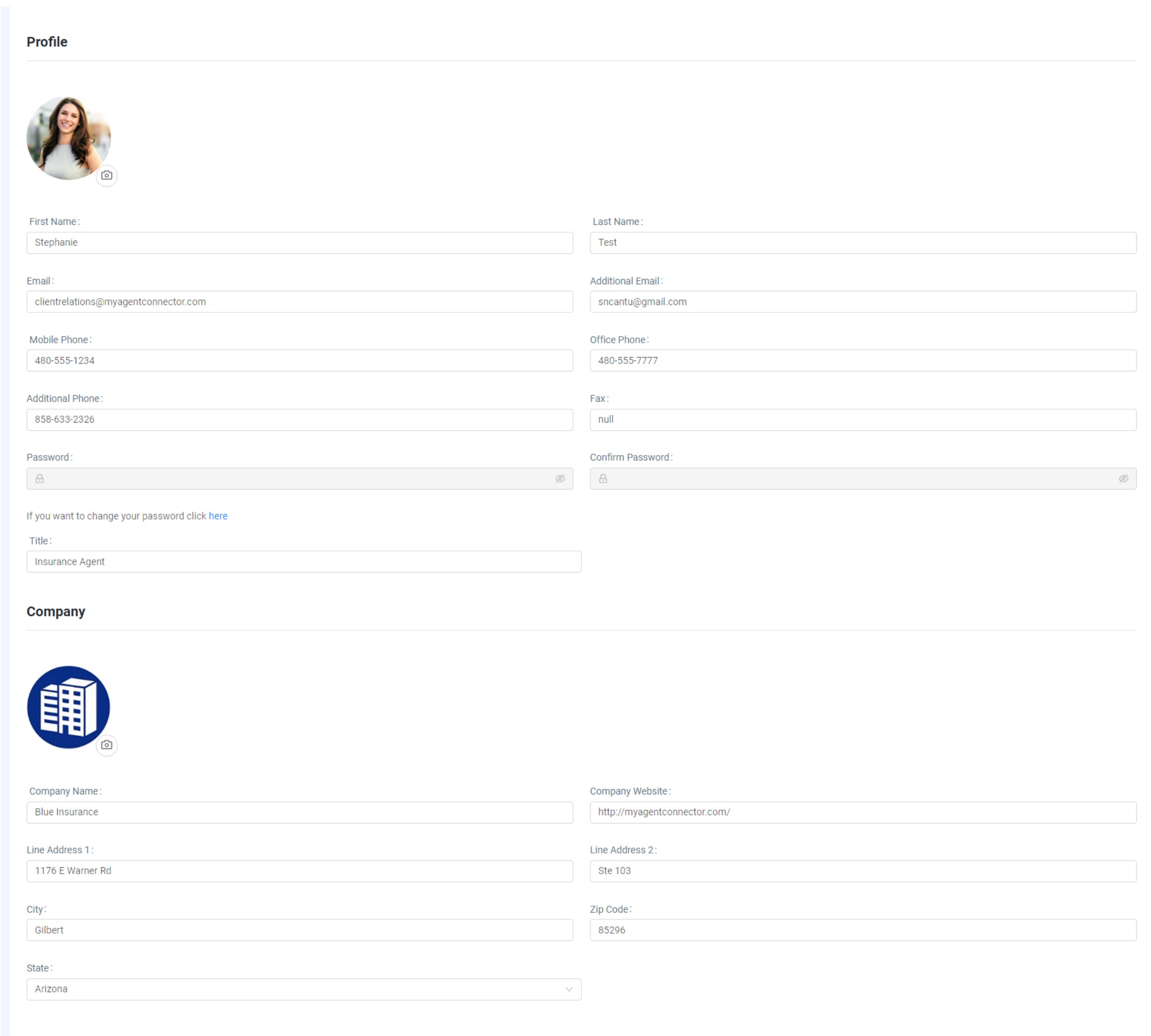
Section 1: Getting Started

Setting Up Your Profile

The information from your profile will appear as the advertisement to your Loan Officers, Real Estate Agents, and consumers.

How to Set Up Your Profile:

1. Log in to your account.
2. Hover over the small circular icon in the upper right hand corner.
3. Click "Edit my profile" from the drop down menu.
4. Upload a headshot and company logo.
5. Fill out all of the applicable fields.
6. Under "Signed Accounts" you can connect your account to Facebook. This is required to use the Social Media Poster.
7. Click "Save" in the upper right hand corner.


Profile

First Name: Stephanie
Last Name: Test
Email: clientrelations@myagentconnector.com
Additional Email: sncantu@gmail.com
Mobile Phone: 480-555-1234
Office Phone: 480-555-7777
Additional Phone: 858-633-2326
Fax: null
Password:
Confirm Password:
If you want to change your password click here
Title: Insurance Agent

Company

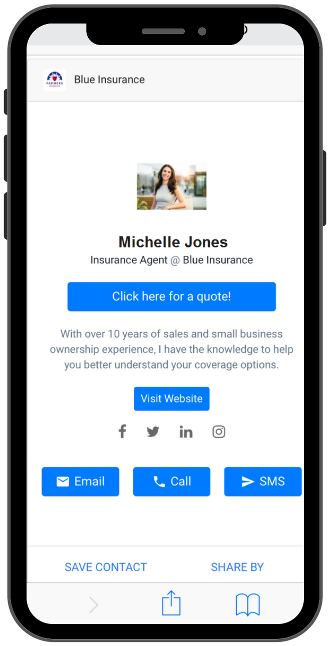
Company Name: Blue Insurance
Company Website: http://myagentconnector.com/
Line Address 1: 1176 E Warner Rd
Line Address 2: Ste 103
City: Gilbert
Zip Code: 85296
State: Arizona

Section 2: Tools and Features

Digital Business Card

Your Digital Business Card can easily be shared via text message or email, and saved to a cell phone's homescreen for easy access. MyAgentConnector keeps track of how many times consumers view and share your card.

How to Set Up Your Digital Business Card:



1. From within your dashboard, click "Digital Business Card" on the left sidebar.
2. Your name, phone, email, company information, photo, and logo will already be filled in if you set up your profile. *See page 3*.
3. Fill out the bio with a couple short sentences.
4. Create a Call to Action and add a link the button will lead to. For example, "Click here for a quote!"
5. Fill in your social media links.
6. Click "Save". A live preview of your card will show you how it appears to consumers.
7. You can also customize the button colors to match your company's branding.

How to Send Your Digital Business Card:

1. From within your dashboard, click "Digital Business Card" on the left sidebar.
2. **To send via text message** - click "Share by SMS" within the live preview of your card. A window will pop up. Enter the name and mobile number of the person you would like to send your card to. You have the option to edit the message. Click "Share Digital Business Card". **When sent via text,** the Digital Business Card will give directions for the consumer to save it to their phone's home screen.
3. **To send via email** - click "Share by Email" within the live preview of your card. A window will pop up. Enter in the name and email of the person you would like to send your card to. You have the option to edit the message. Click "Share Digital Business Card"
4. These share options can also be performed from the DBC on a mobile phone.

How to View Digital Business Card Shares:

1. From within your dashboard, click "Leads" on the left sidebar.
2. Click "DBC Leads" next to Listing Leads. On the left you will see a list of people your card has been sent to. Click the name of the lead. Under Lead Information, you will be able to see the phone number of the person who received your Digital Business Card.

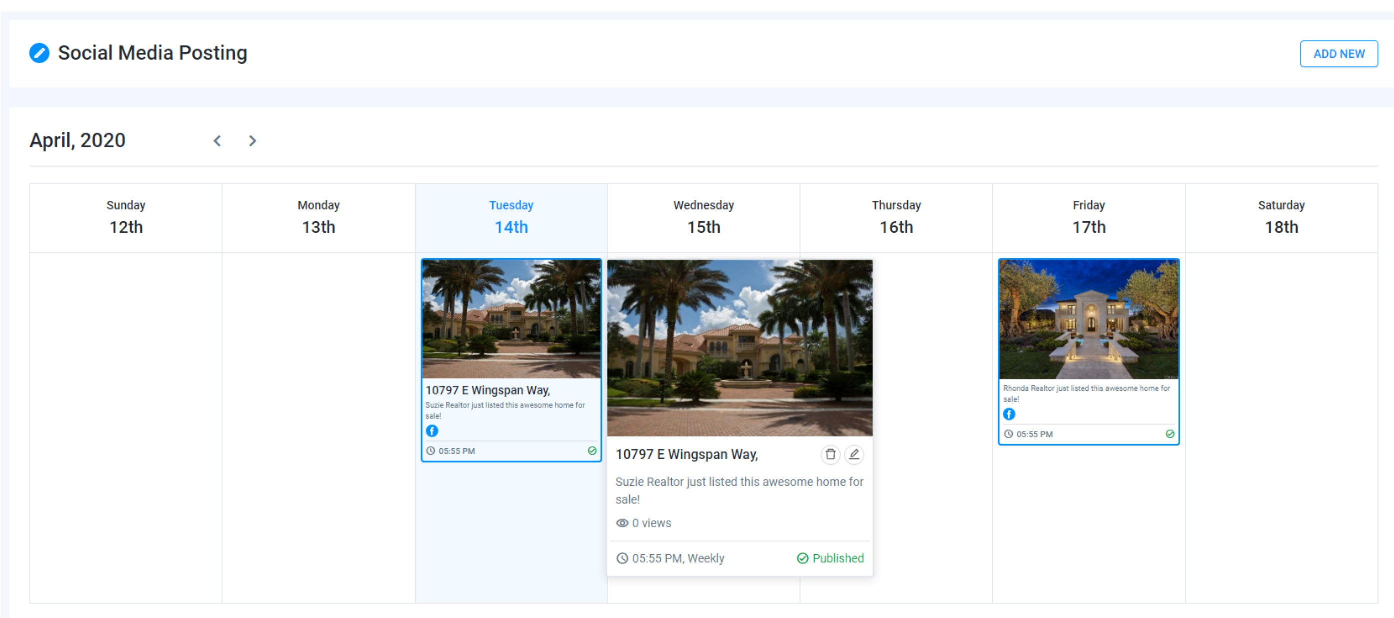
Section 2: Tools and Features

Social Media Posting

You can share your Real Estate Agent's listings to Facebook by using our Social Media Poster or by posting the individual listing directly to Facebook.

How to Use the Social Media Poster:

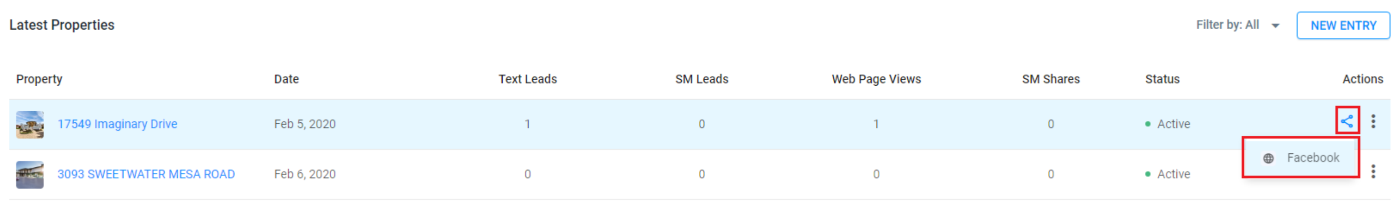
1. From within your dashboard, click "Social Media Posting" on the left sidebar.
2. Click "ADD NEW" in the upper right hand corner. **Note**: if the button is greyed out, you will need to connect your account to Facebook from within your profile. *See page 3*.
3. Select whether you would like to get the listing from one of your Direct Real Estate Agents or a Real Estate Agent under one of your Loan Officers.
4. Select which listing you would like to post to social media.
5. Select Facebook from the "Post to" field.
6. Write a description to go with your post in the Text box. For example, "Check out this new listing from Suzie Realtor!"
7. Select the date and time you would like the listing to post to your Facebook.
8. Select how often you would like the listing to post to your Facebook.
9. Click "Schedule". The listing will post to your Facebook account with the Single Property Website link. When consumers click the link they will be prompted to fill out the lead capture form. Leads will be sent to you, your Real Estate Agent, and the Loan Officer. Scheduled posts can be edited and deleted from the calendar.

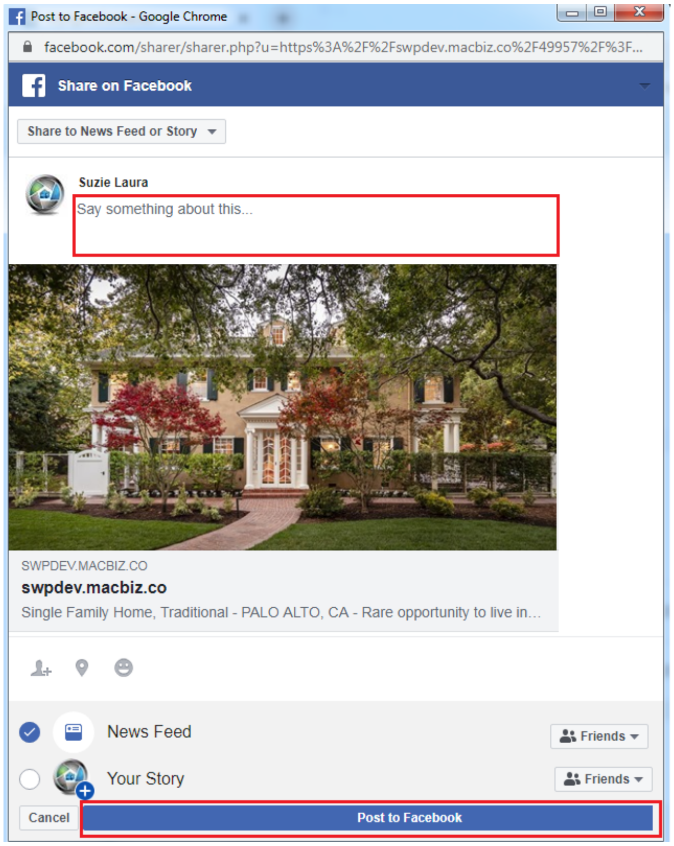


Section 2: Tools and Features

How to Post an Individual Listing Directly to Facebook:

1. From within your dashboard, log in to the Real Estate Agent whose listing you would like to share on Facebook. If they are one of your Direct Real Estate Agents, simply click on their photo from your Direct Real Estate Agents section. If they are under one of your Loan Officers. From the Loan Officer's dashboard, click on the photo of the Real Estate Agent to view their account.
2. Locate the listing from within the Real Estate Agent's account.
3. Click on the share icon ( ) under the Actions column. Select Facebook.
4. A window should pop up prompting you to sign in to Facebook. Once you sign in, the window should prompt you to write a description and share the post to your News Feed.
5. Click "Post to Facebook". The listing will post to your Facebook account with the Single Property Website link.





Section 2: Tools and Features

Sign Riders

Sign riders are a great way to generate leads and build relationships with your Loan Officers and Real Estate Agents. When you receive a new listing notification email, contact your Real Estate Agent to see if they need a sign rider.

How Sign Riders Work:

When a consumer texts for more information, they will receive an automatic text message back with the listing details and a link to the Single Property Website. The consumer's phone number is captured and stored in the Leads Section. An email alert is also sent to you, the Real Estate Agent, and Loan Officer.

How to Order Sign Riders:

You can purchase PVC sign riders through us or a local company of your choosing. If you choose to order through a local company, we will give you the property text codes to be printed on the signs. Contact us for pricing details.

Sign Rider Artwork

Property Sign Code Section:

The Property Sign Code section is located on the left sidebar of your Dashboard. MAC 2.0 keeps track of the Loan Officers, Real Estate Agents, and listings your sign riders are connected to. This way you will always know which sign riders are in use. You can by sign code, Loan Officer or Real Estate Agent name, or address. You also have the option to reassign codes.

Search

Text Sign Code	Assigned To (LO > REA)	Property	Action
Agent2533	Michelle Realtor	1176 E Warner Rd	Unassign
Agent2535	Michelle Realtor	-	Unassign
Agent2536		-	Assign to
Agent2537		-	Assign to

Section 2: Tools and Features

How to Assign Property Text Codes to Your Referral Partners:

1. From your dashboard, click on "Property Sign Code" on the left sidebar. This page will display the property text codes for the sign riders you have ordered. If you do not see your property text codes listed on this page, please contact us.
2. Locate the property text code you would like to assign to your referral partner.
3. Click "Assign to" and select the Real Estate Agent or Loan Officer you would like to assign the property text code to. Click "Assign".
4. You will now see your referral partner's name under the Assigned To column for that property text code. The code(s) you assigned to them will appear in their Property Sign Code section.

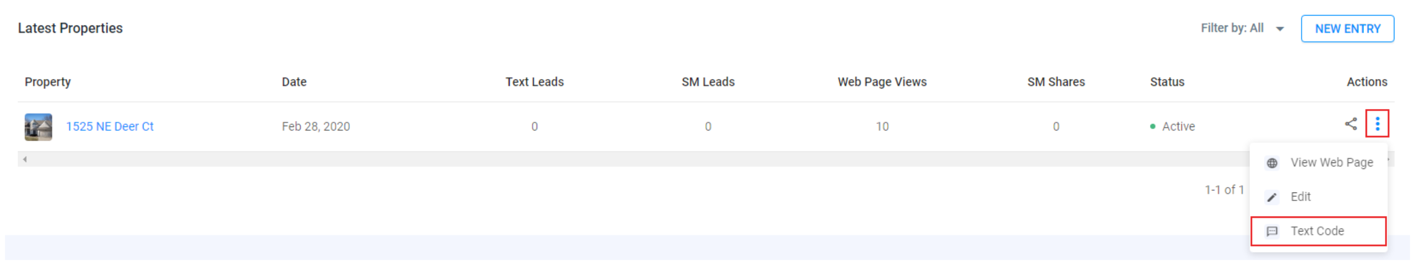
If you assigned a property text code to a Loan Officer - their next step will be to assign the code to their Real Estate Agent using the same process detailed above.

If you assigned a property text code to a Direct Real Estate Agent - their next step will be to assign the code to their listing. See instructions below.

NOTE: You have the ability to assign property text codes to Real Estate Agents under your Loan Officers and Real Estate Agent listings. Use caution when doing this to be sure you are assigning the property text code to the correct Real Estate Agent and listing.

How Real Estate Agents Connect Sign Riders to Listings:

1. The Real Estate Agent will need to have the listing added to their account. From their dashboard, they will locate the listing and click on the 3 vertical dots under the Actions column and select "Text Code".
2. Click the drop down menu under "User Personal Sign Code". The Real Estate agent will select one of the codes that has been assigned to them and click "Save". The sign rider is now connected to the listing. Additionally, the real estate agent can edit the text response that is sent to the consumer. Insurance Agents and Loan Officers cannot edit the text response.



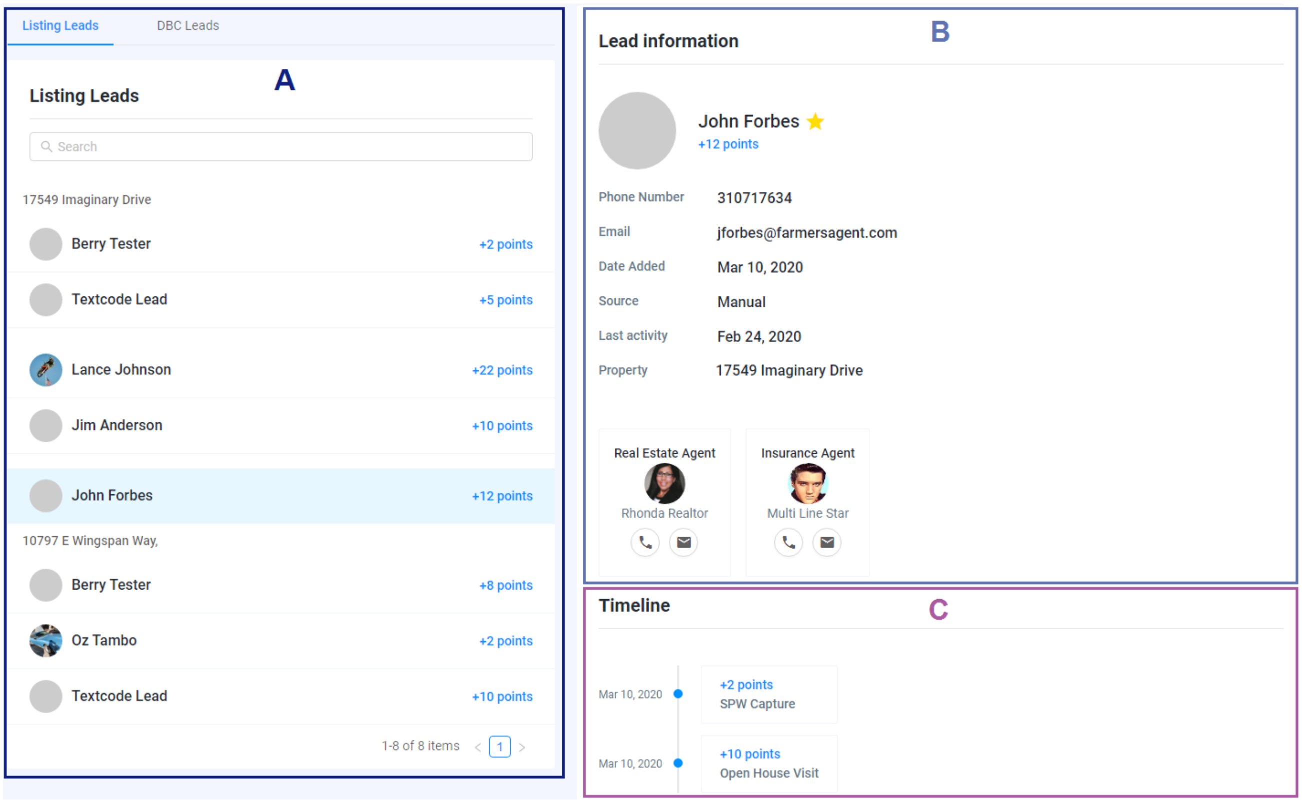
Section 2: Tools and Features

Lead Tracking

MAC 2.0 keeps track of consumer leads in your account. An email is also sent out for each type of lead. Each referral partner will receive the email alerting them of a new lead. Leads are assigned a point value, so you can easily see which listings have the most valuable lead activity.

Where Leads are Generated From:

- Facebook - 2 Points
- Open House Visit - 10 Points
- Digital Business Card - 2 Points
- Property Text Code/Sign Riders - 5 Points
- Single Property Website Visit - 1 Point



Leads Section Overview:

A. This is where your leads are sorted by listing and where Digital Business Card share leads are stored.

B. This is where you can see the lead details, as well as the Real Estate Agent and Loan Officer connected to the listing.

C. The Timeline tracks how many times one consumer generates a lead. For example, if a consumer texts the Property Text Code for more information (1st lead), and then signs into the upcoming open house (2nd lead).

Section 3: Loan Officers

Signing Up Loan Officers

You can add up to 5 Loan Officers to your account. There are two ways to sign up a Loan Officer: by creating their account for them or sending an invitation. We recommend getting your Loan Officer's permission to create their account for them.

How to Sign Up a Loan Officer:

1. From your account dashboard, click "ADD NEW" in your My Loan Officers section. A window will pop up prompting you to enter your Loan Officer's email address. Enter their email address and hover over "SIGNUP".
2. **If you select "By Invitation"** - an invitation email will be sent to your Loan Officer's email. From the email, your Loan Officer will click a "Join" button. They will be brought to a page to fill out their profile information. Once they fill it out and click "Save", their account will be created. If your Loan Officer does not receive the invitation email, have them check their spam folder. You can also resend the invitation by going to the "Add Loan Officer" section on your dashboard's left sidebar. Under the Status column you will see an option to resend invitation.
3. **If you select "Manual"** - you will be brought to a page where you can fill out your Loan Officer's account information. You are only required to enter their name and phone number. You will also be required to create a password for your Loan Officer. Once you finish filling out their account information, click "Save/Get Started". A welcome email will be sent to your Loan Officer with the password you created for them and a link to sign in.

Loan Officer Account Features

The Loan Officer account functions a lot like the Insurance Agent account and has many of the same features.

- **Unlimited Real Estate Agents** - Loan Officers can add an unlimited amount of Real Estate Agents using the instructions listed in *Section 4: Real Estate Agents*.
- **Digital Business Card** - Your advertisement is featured on their Digital Business Card.
- **Social Media Posting** - Loan Officers can use the Social Media Poster or post individual listings to Facebook.
- **Property Text Code Section** - Loan Officers can assign text codes to their Real Estate Agents.
- **Lead Tracking** - Functions the same as the Insurance Agent leads section.
- **Advertisement** - The Loan Officer's advertisement will appear next to yours on listings.

Section 4: Real Estate Agents

Signing Up Real Estate Agents

You can add an unlimited amount of Real Estate Agents to your account. There are two ways to sign up a Real Estate Agent: by creating their account for them or sending an invitation. We recommend getting your Real Estate Agent's permission to create their account for them.

How to Sign Up a Real Estate Agent:

1. From your account dashboard, click "ADD NEW" in your Direct Real Estate Agents section. A window will pop up prompting you to enter your Real Estate Agent's email address. Enter their email address and hover over "SIGNUP".
2. **If you select "By Invitation"** - an invitation email will be sent to your Real Estate Agent's email. From the email, your agent will click a "Join" button. They will be brought to a page to fill out their profile information. Once they fill it out and click "Save", their account will be created. If your agent does not receive the invitation email, have them check their spam folder. You can also resend the invitation by going to the "Add Real Estate Agent" section on your dashboard's left sidebar. Under the Status column you will see an option to resend invitation.
3. **If you select "Manual"** - you will be brought to a page where you can fill out your Real Estate Agent's account information. You are only required to enter their name and phone number. You will also be required to create a password for your agent. Once you finish filling out their account information, click "Save/Get Started". A welcome email will be sent to your Real Estate Agent with the password you created for them and a link to sign in.

Real Estate Agent Account Features

- **Auto-Build Listings** - The Real Estate Agent submits a form with their listing address and our team will build their listing for them.
- **Manual Listing Builder** - A great option for pre-market listings.
- **Digital Business Card** - Your advertisement is featured on their Digital Business Card.
- **Single Property Website** - Automatically created when a listing is added to an account.
- **Social Media Posting** - Real Estate Agents can use the Social Media Poster or post individual listings to Facebook.
- **Open House App** - Visitor leads are sent to you, the Real Estate Agent, and Loan Officer.
- **Property Text Codes** - Real Estate Agents can connect sign riders to their listings.
- **Lead Tracking** - Leads are stored within the Real Estate Agent's Leads section.

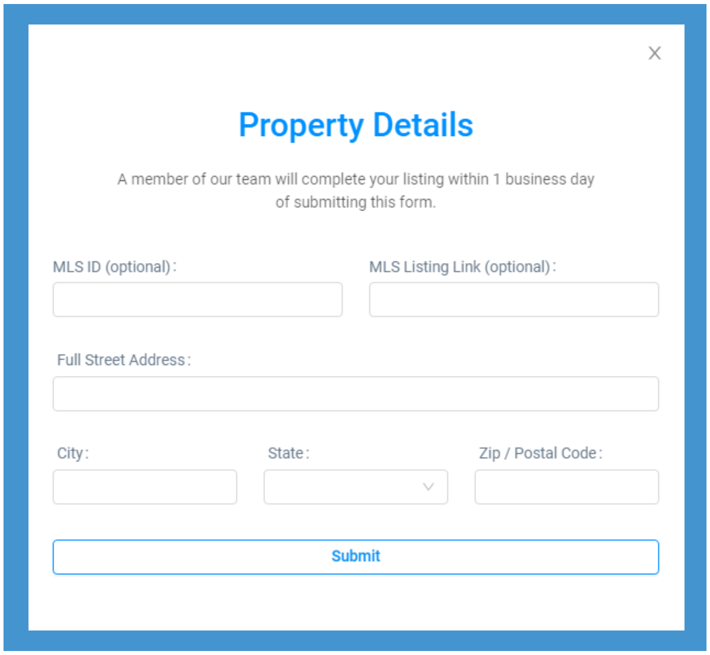
Section 4: Real Estate Agents

Listings

There are two ways listings can be added to a Real Estate Agent's account: Auto-Build and Manual Build.

How To Use the Auto-Build Feature:

1. From their dashboard, the agent will click the "Auto-Build" button in their "Latest Properties" section.
2. A form will pop up where the agent can enter the listing's MLS ID (optional), listing link (optional), and street address. A listing link is recommended, so that our team has easy access to the listing's photos.
3. The agent clicks "Submit". Our team will receive a notification to build the listing. An email notifying the agent of their listing's completion will be sent to the agent. The listing will be completed same day, unless the form is submitted at the end of the business day or after business hours.



How a Real Estate Agent Manually Adds a Listing:

1. From their dashboard, the agent will "Add Listing" button in their Latest Properties section.
2. A window will pop up prompting them to add the property details. Follow the nine steps to add the listing details and photos.
3. Click "Save" to add the property to the account.

Section 5: Account Support

Tutorial Videos

You can access our tutorial videos on our main page at www.myagentconnector.com/insurance-agent-tutorials. We have videos for Insurance Agents, Loan Officers, and Real Estate Agents.

Knowledgebase

Have a question that wasn't answered in this guide? Visit the MyAgentConnector knowledgebase at https://myagentconnector.zendesk.com to view more articles.

Phone Support

Contact us at 858-633-2326 Monday-Friday 9AM-5PM MST

Email Support

Contact us at clientrelations@myagentconnector.com. Our support team will respond during our business hours.