

Experience

Completed by E360 Help Desk

Screen shots, with identifier above the screen shot, so QC person(s) can identify what the screen shot is for.
Emails requesting account set up/termination must be added to the ticket for audit purposes.

NOTE: If the user is granted the tier manager role, they also need to be granted their “user” role. This provides access to reply to reviews and has a widget code.

User Setup:

Log into Experience <https://app.experience.com/user/signin>

From the dashboard, you will click “Hierarchy” and then “Users”

The screenshot shows the Experience.com dashboard. On the left, there is a sidebar with three options: "Dashboard", "Hierarchy" (which is highlighted with a yellow box), and "Settings". To the right of the sidebar is a search and filter interface. At the top of this interface are two tabs: "Hierarchy" (highlighted with a green box) and "Users". Below these tabs are several filter and search fields: "Filter Hierarchy" (with a "Clear" button), "Search" (with a text input field), "Filter by Hierarchy" (with a dropdown menu "Filter By Tiers"), "Category" (with a dropdown menu "Show All"), "Profile" (with a dropdown menu "Show All"), "Status" (with a dropdown menu "Activated"), and "Columns" (with checkboxes for "Category", "Users" (highlighted with a yellow box), "Location", and "Profile").

Click “Users”, then “Add New User”

The screenshot shows the Experience.com users page. At the top, it displays the company name "Highlands Residential Mortgage, Ltd." and the current section "Hierarchy / Users". Below this, there are summary statistics: 8 Region, 66 Branch, 232 Users, 74 Published Profiles, and 1 Unpublished Profiles. At the bottom of the page, there is a navigation bar with tabs "Hierarchy" and "Users" (highlighted with a green box). To the right of the navigation bar is a red arrow pointing to a button labeled "Add New User".

“Add Single User”

Create New User

Add Single User Add Multiple Users

Enter First Name

Enter Last Name

Enter email address

Employee ID

Opt-in to Experience login: Slide to “blue”

Allow Survey Completion: this defaults “blue”

Allow user to expire Survey: this defaults “blue” – **Slide to turn off***

Tier: Select Branch Location

Role: Select based on user’s title

Tier Manager – Branch/Sales Manager and above

Agent: Loan Officer/LOA

Create New User

First Name •
Steve

Last Name •
Calabrese

Email •
SCalabrese@highlandsmortgage.com

Employee ID
012123

Opt-in to Experience.com login

Send Settings

Allow survey completion notification

Allow reply to reviews notification

Allow to Expire Survey

Allow user to expire a survey

Tier and Role Assignment

Tier
Ft. Myers

Role
Tier Manager

Ft. Myers - Tier Manager



Login Settings & Listings Settings

Do not change: Import Google Posts or Import Facebook Posts

Opt-in to Experience.com login: this defaults “blue”

Import Q & A from Google: this defaults “blue”

Login Settings	
Opt-in to Experience.com login	<input checked="" type="checkbox"/>
Listings Settings	
Import Q&A from Google	<input checked="" type="checkbox"/>
Import Google Posts	<input type="checkbox"/>
Import Facebook Posts	<input type="checkbox"/>

Review Management Settings:

Do not change, Import Google Reviews or Import Facebook Reviews

Allow user to reply to reviews: this defaults “blue”

“Allow user to reply to reviews”: this defaults “blue”

Confirm “Minimum score to reply on reviews” is set to “3” (This can sometimes default to 2.5 or 4)

Allow user to reply using AI: this defaults “blue”

Review Management Settings	
Import Google Reviews	<input type="checkbox"/>
Import Facebook Reviews	<input type="checkbox"/>
Allow user to reply to reviews	<input checked="" type="checkbox"/>
Minimum score to reply on reviews	<input type="range"/> 3
Allow user to reply using AI	<input checked="" type="checkbox"/>

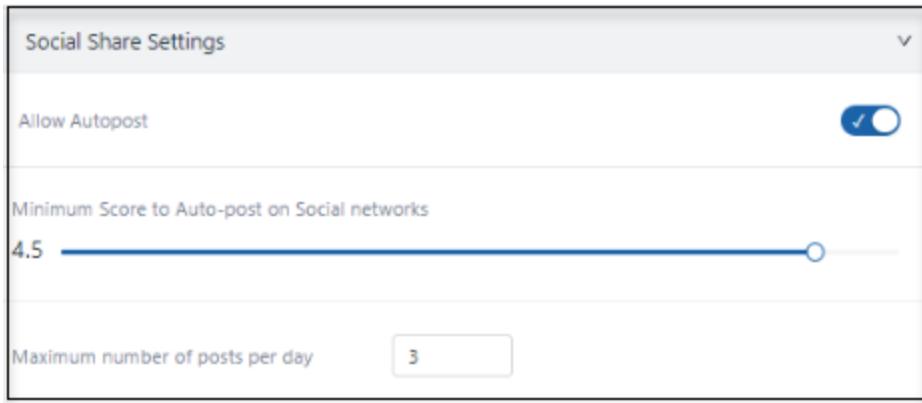
Social Share Settings:

(CONFIRM all settings)

Allow Auto-post – on by default

Minimum score – set at 4.5 by default

Maximum Number of posts per day – Set at 3 by default



The screenshot shows the 'Social Share Settings' configuration panel. It includes a toggle switch for 'Allow Autopost' which is turned on. Below it is a slider for 'Minimum Score to Auto-post on Social networks' with a value of 4.5. At the bottom is a field for 'Maximum number of posts per day' with a value of 3.

Minimum gap between posts – set at 2 hours 0 minutes by default

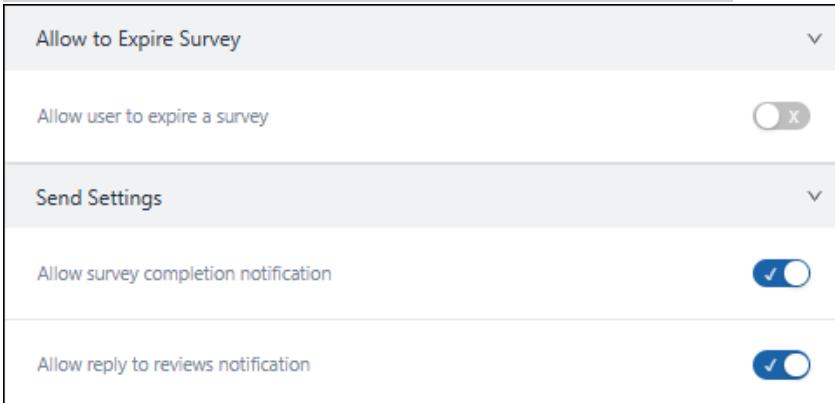


The screenshot shows the 'Minimum gap between posts' settings. The input field shows '2' in the hours section and '0' in the minutes section, indicating a gap of 2 hours and 0 minutes.

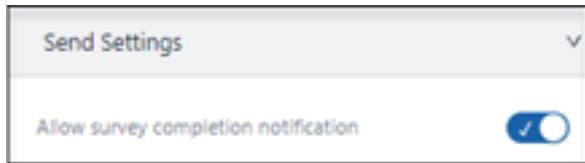
Send Settings for Allow survey completion notification set to blue by default

Allow to Expire Survey

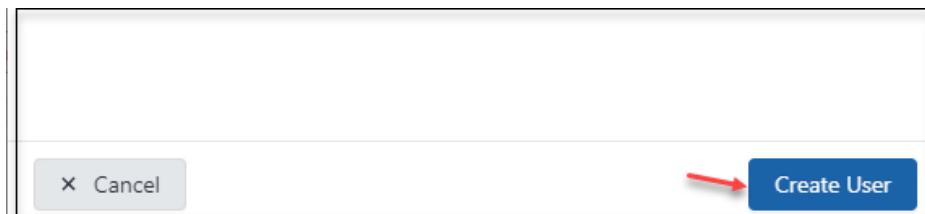
Allow to Expire Survey – toggle off, this is typically toggled on



The screenshot shows the 'Allow to Expire Survey' configuration panel. It includes a toggle switch for 'Allow user to expire a survey' which is turned off. Below it is a 'Send Settings' section containing two items: 'Allow survey completion notification' (which is turned on) and 'Allow reply to reviews notification' (which is also turned on).



Select “Create User”

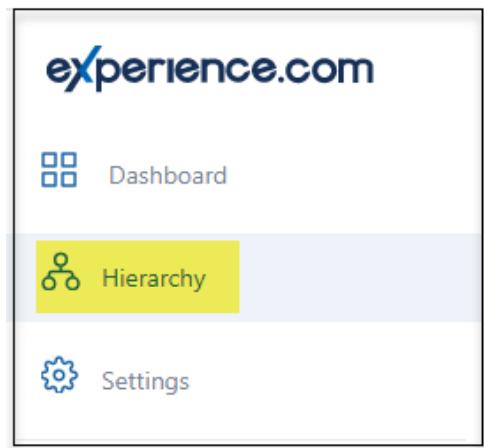


Select “Confirm”



Publish Users site:

From the dashboard, you will click “Hierarchy” and then “Users”. Type User name in “Search Box”



The screenshot shows the 'Users' tab selected in the navigation bar. On the left, a filter sidebar is open with a search input containing 'test user'. The main area displays a table with one row for 'Test User' (noemail@highla...). The 'Published' column shows a radio button set to 'No'.

Check Box to left of username, and click of "No" under "Published"

The screenshot shows the same interface after the user has checked the checkbox next to 'Test User' and clicked the 'No' radio button under 'Published'. Red arrows point to both the checked checkbox and the 'No' radio button.

Popup – Click confirm

The screenshot shows a modal dialog titled 'Publish User Profile'. It contains a message stating 'Following profiles will be published' followed by 'Test User - @ Highlands Residential Mortgage, Ltd.'. Below this is an info box with the heading 'Info:' and the text: 'Once agent profile is published, the profile will be available on <https://pro.experience.com>'. At the bottom are 'Cancel' and 'Confirm' buttons, with a red arrow pointing to the 'Confirm' button.

Confirm “Published” is set to “Yes”

User Information Publish Name Status Social Connection Roles Published
Test User noemail@highla... ONBOARDING 1 Yes

Obtain User Widget for Bigfish

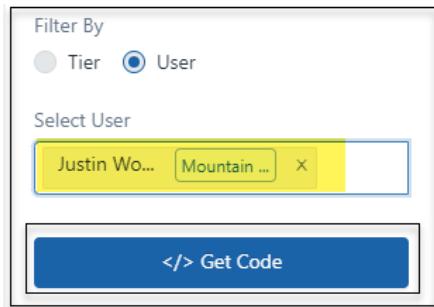
Click “Widgets” from Menu, then “Review Widget”

eXperience.com Highlands Residential
Dashboard Hierarchy Settings Transactions Apps Reports Campaigns Widgets Review Widget

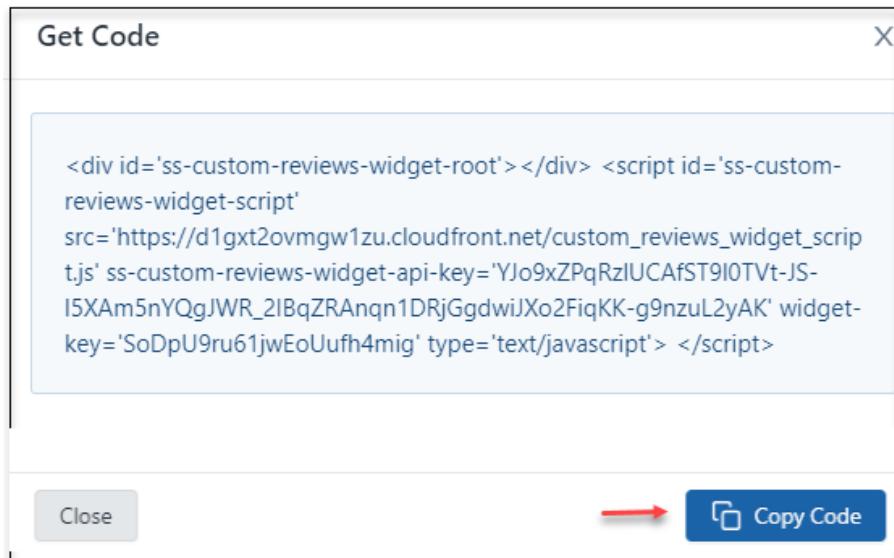
Click on “Basic Review” and Filter By “User”

Basic Review Customize >
① Info: Set the No. of reviews per page, copy the code and use it anywhere in your website.
No. of reviews per page: 10
Filter By: User
Select User: Please select

Find agent in the “Select User” Field, then click “Get Code”

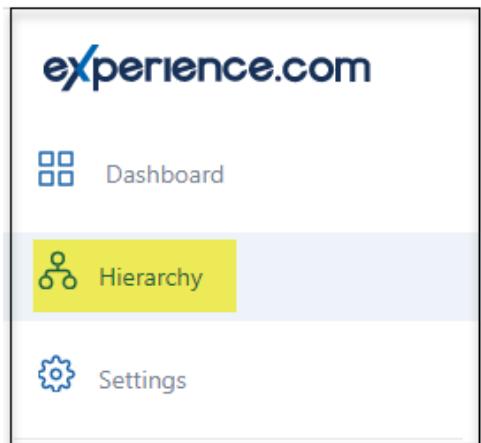


Click on “Copy Code” and provide to Bigfish to update website



Locating the website link for Total Expert

From the dashboard, you will click “Hierarchy” and then “Users”.



Type User name in “Search Box”

The screenshot shows the 'Users' section of the Highload platform. On the left, there is a 'Filter Users' sidebar with a search input field containing 'test user'. The main area displays a table with columns: 'User Information', 'Publish Name', 'Status', 'Social Connection', 'Roles', and 'Published'. A single user entry is shown: 'Test User' (noemail@highla...), status 'ONBOARDING', social connection icons for Facebook, LinkedIn, Twitter, and Instagram, one role assigned, and published status set to 'No'.

Click on Hamburger menu and select “View Profile”

This screenshot illustrates the 'Actions' menu for a user profile. The menu is divided into two sections: 'Verified' (containing a gear icon) and 'Actions' (containing a gear icon and three dots). A red arrow points to the gear icon in the 'Actions' section, which has a dropdown menu listing five options: 'Edit', 'View Profile', 'Move User', 'Deactivate', and 'Unpublish Profile'. The 'View Profile' option is highlighted.

Link noted below will be utilized with Total Expert account (CUSTOM FIELD 3, Application URL)

The screenshot shows the experience.com platform's Hierarchy section. On the left, there's a sidebar with various menu items: Dashboard, Hierarchy (which is selected and highlighted in blue), Transactions, Settings, Apps, Listings, Reviews Management, Reports, Campaigns, and Transaction Monitor. The main content area is titled "Highlands Residential Mortgage, Ltd." and shows the "Hierarchy" path as Accounts > Hierarchy > Preview Profile. A red box highlights a link "Visit user profile: <https://pro.experience.com/reviews/derek-shaw-232567>". To the right of this link is a red callout bubble containing the text: "Copy and paste this link into the custom field at the bottom of the users Surefire Profile and click Save."

Additional fields (used for new users and editing existing users)

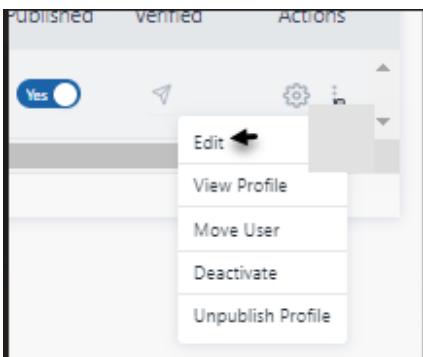
Click “Users” and type name

The screenshot shows a search interface for users. At the top, there are tabs for "Hierarchy" and "Users", with "Users" being active. Below the tabs is a "Filter Users" button and a "Clear" button. A search bar contains the text "michael".

Locate the user and click on “three dots”

The screenshot shows a user profile card. It includes a small icon, a user photo, the user's name, and a "More" button represented by three vertical dots. A red arrow points to the three dots.

Click on “Edit User”



A screenshot of the 'Profile Info' section. It includes a header 'Profile Info' and 'Profile Settings'. Below are several expandable sections: 'Business Information' (with a red arrow pointing to it), 'Business Hours', 'Address' (with an 'Add Address' button), 'Contact Information' (with a red arrow pointing to it), 'Social Media Links', 'Images' (with a red arrow pointing to it), 'Awards', 'Position', 'Products & Services Offered', 'Memberships', 'Specialties', 'Achievements', 'Hobbies', and 'Licenses' (with a red arrow pointing to it).

Add "Business Information"

Update Title, replace "Highlands Residential Mortgage, LTD. with Users title

Edit Test User Information

Profile Info		Profile Settings
Business Information		
Name •  <input type="text" value="Test"/>  <input type="text" value="User"/>		
Publish Name • <input type="text" value="Test User"/>		
Business Category  <input type="text" value="Mortgage"/>		
Business Sub-Category  <input type="text" value="Please select"/>		
Title •  <input type="text" value="Loan Officer"/>		
Tagline  		

Add “Contact Information”

Edit Test User Information

Profile Info		Profile Settings
Business Information		
Business Hours  		
Address 		 Add Address
Contact Information		

Enter information in highlighted fields

Phone: users office number

Mobile: users cell number

Website URL: HRM user website link

Edit Test User Information

Profile Info

Business Information

Business Hours

Address [Add Address](#)

Contact Information

Phone Number • [Edit](#)
(469) 402-1200

Ext

Mobile Number

Mobile Number

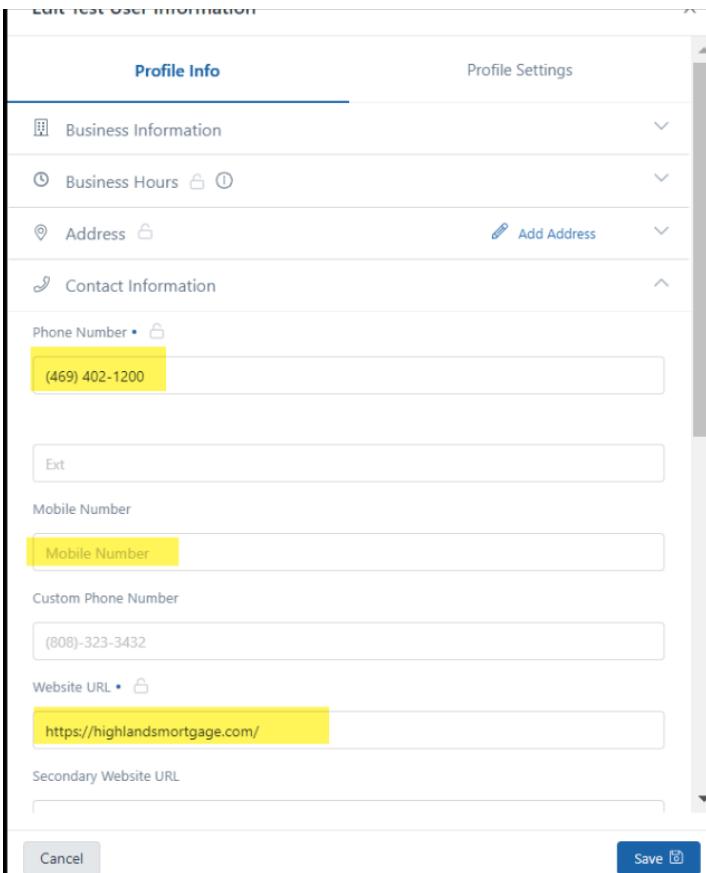
Custom Phone Number

(808)-323-3432

Website URL • [Edit](#)
<https://highlandsmortgage.com/>

Secondary Website URL

[Cancel](#) [Save](#)



Add “License Name”

Enter users NMLS number: (example NMLS# 123456)

Licenses

License Name

NMLS# 123456



Add Headshot:

Click “Select Images”, then “Upload”. Locate LO picture

Marketing will place users’ headshots into the link below PLEASE NOTE: You must be on Meraki VPN or in a HRM office to access

Click link: http://10.201.127.4:5000/fsdownload/ljgxjQRjU/03_Loan%20Officers

Highlight picture and click enter, then click “Save”

