

# Experience

Completed by E360 Help Desk

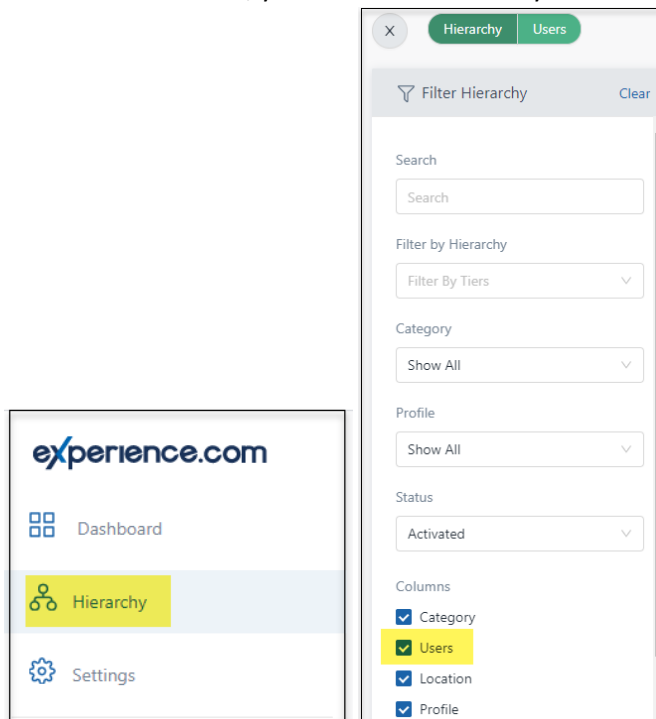
Screen shots, with identifier above the screen shot, so QC person(s) can identify what the screen shot is for. Emails requesting account set up/termination must be added to the ticket for audit purposes.

**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.

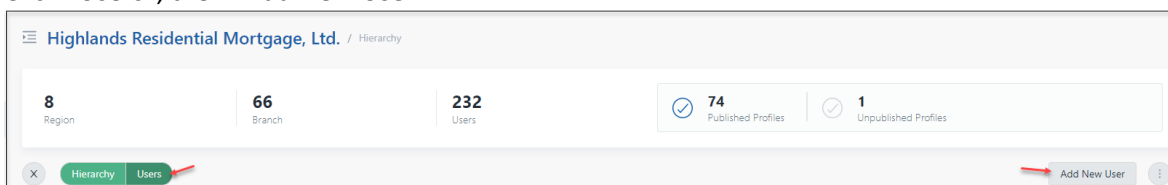
## User Setup:

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

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



Click “Users”, then “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

×

Cancel

Create User

## 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="text" value="3"/>      |
| Allow user to reply using AI      | <input checked="" type="checkbox"/> |

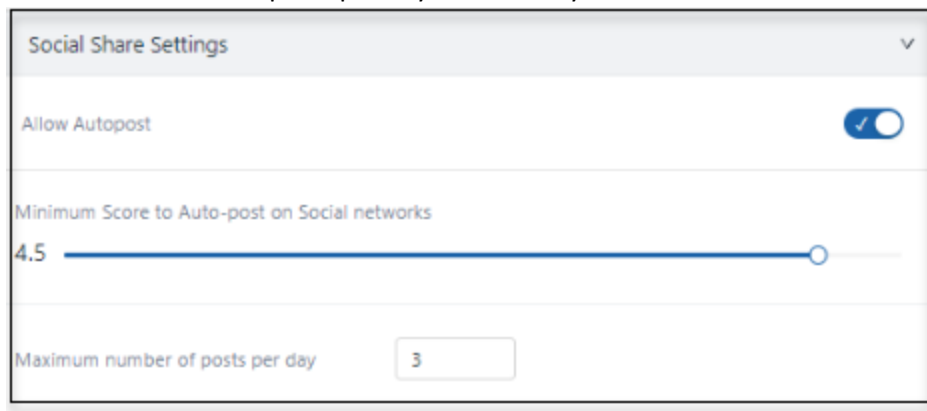
## Social Share Settings:

(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 a 'Social Share Settings' panel with a dropdown arrow in the top right. It contains three settings: 'Allow Autopost' with a blue toggle switch that is turned on; 'Minimum Score to Auto-post on Social networks' with a slider set to 4.5; and 'Maximum number of posts per day' with a text input field containing the number 3.

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

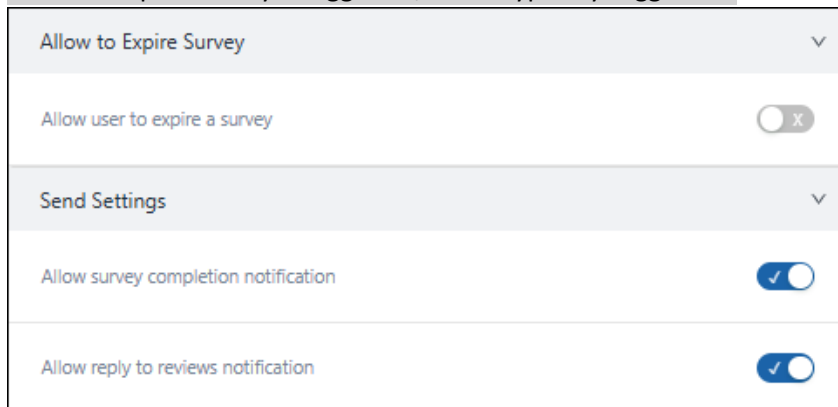


The screenshot shows a 'Minimum gap between posts' setting. It consists of a text input field with the number 2, followed by a 'Hours' label and another text input field with the number 0, and finally a 'Mins' label.

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 an 'Allow to Expire Survey' panel with a dropdown arrow in the top right. It contains two sections: 'Allow user to expire a survey' with a grey toggle switch that is turned off, and 'Send Settings' with a dropdown arrow. Under 'Send Settings', there are two toggle switches: 'Allow survey completion notification' which is turned on (blue), and 'Allow reply to reviews notification' which is also turned on (blue).

Send Settings

Allow survey completion notification

☒

Select "Create User"

× Cancel

Create User

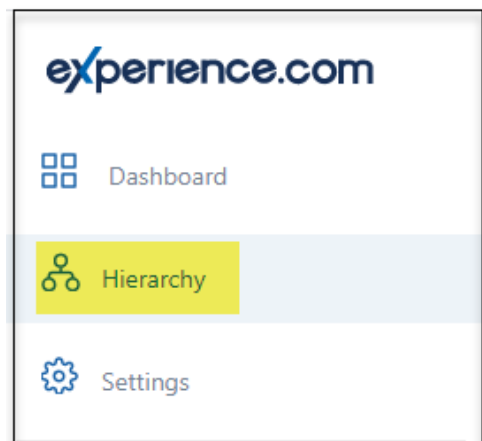
Select "Confirm"

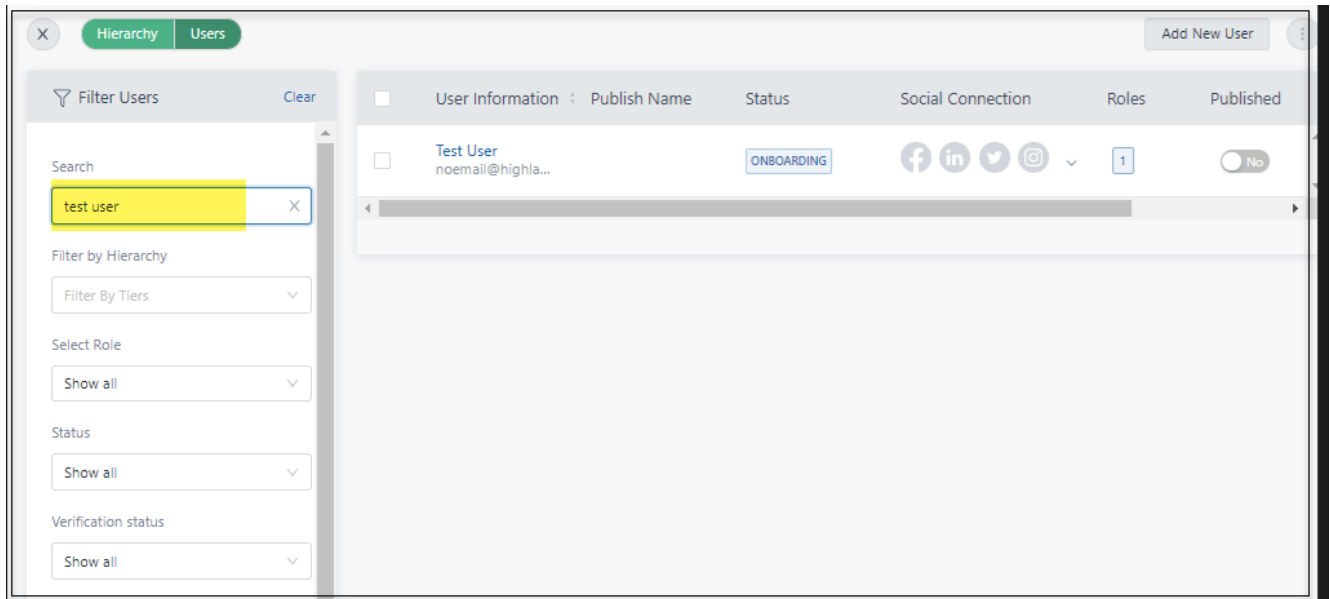
← Back

✓ Confirm

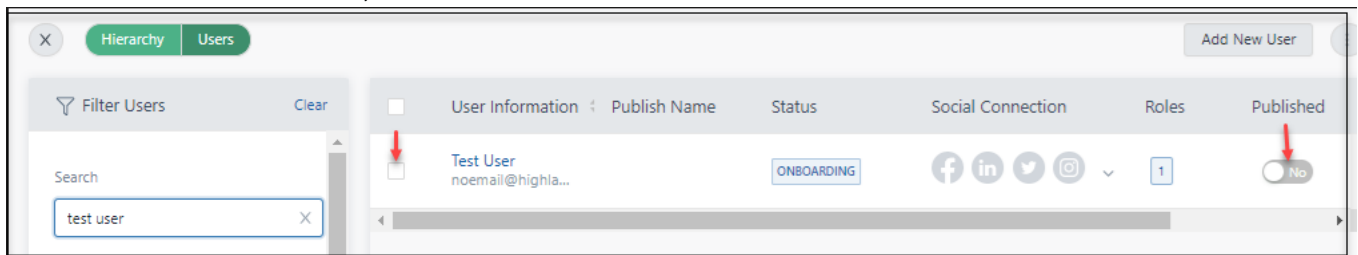
Publish Users site:

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

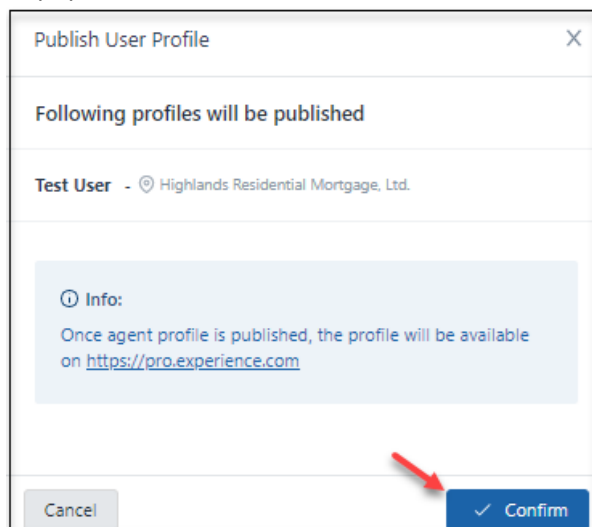









Check Box to left of username, and click of “No” under “Published”



Popup – Click confirm

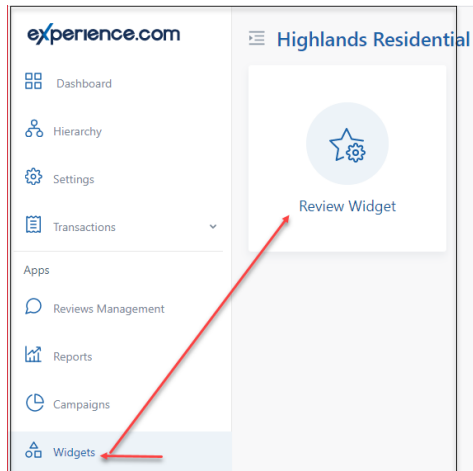


Confirm “Published” is set to “Yes”

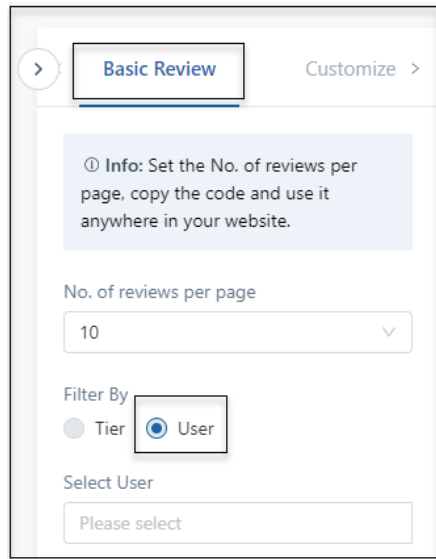
| <input checked="" type="checkbox"/> | User Information               | Publish Name | Status     | Social Connection   | Roles | Published                               |
|-------------------------------------|--------------------------------|--------------|------------|---|-------|---|
| <input checked="" type="checkbox"/> | Test User<br>noemail@highla... |              | ONBOARDING |      | 1     | <input checked="" type="checkbox"/> Yes |

## Obtain User Widget for Bigfish

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



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

A screenshot of the 'Basic Review' configuration screen. At the top, there's a 'Basic Review' tab and a 'Customize' link. Below is an info box: 'Info: Set the No. of reviews per page, copy the code and use it anywhere in your website.' Underneath, there's a 'No. of reviews per page' dropdown set to '10'. Then, a 'Filter By' section with two radio buttons: 'Tier' and 'User'. The 'User' radio button is selected and highlighted with a red box. Below that is a 'Select User' dropdown menu with the text 'Please select'.

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

Filter By  
☐ Tier ☒ User

Select User

Justin Wo...

Mountain ...

×

[</> Get Code](#)

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

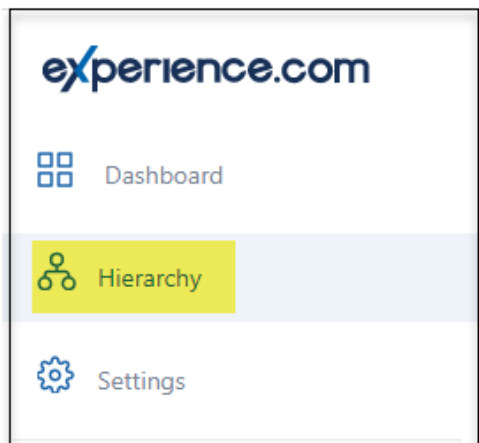
Get Code ×

```
<div id='ss-custom-reviews-widget-root'></div> <script id='ss-custom-reviews-widget-script' src='https://d1gxt2ovmgw1zu.cloudfront.net/custom_reviews_widget_script.js' ss-custom-reviews-widget-api-key='YJo9xZPqRzlUCAfST9l0TVt-JS-l5XAm5nYQgJWR_2lBqZRAqn1DRjGgdwiJXo2FiqKK-g9nzuL2yAK' widget-key='SoDpU9ru61jwEoUufh4mig' type='text/javascript'> </script>
```

Close [→ Copy Code](#)

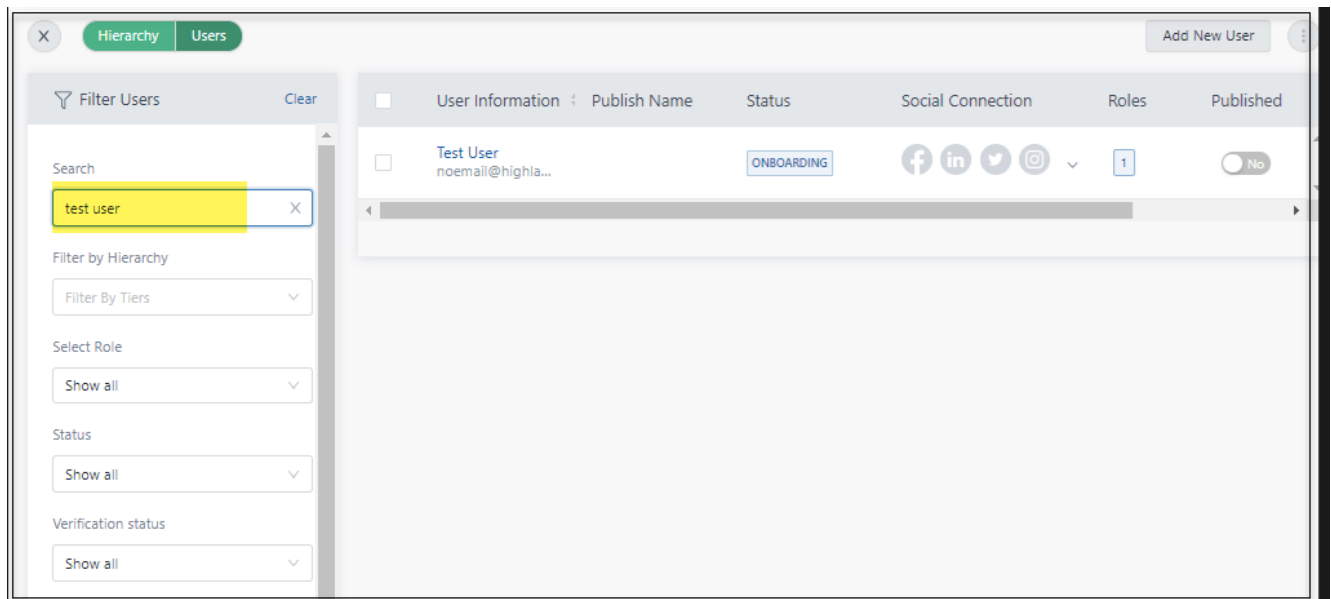
## Locating the website link for Total Expert

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

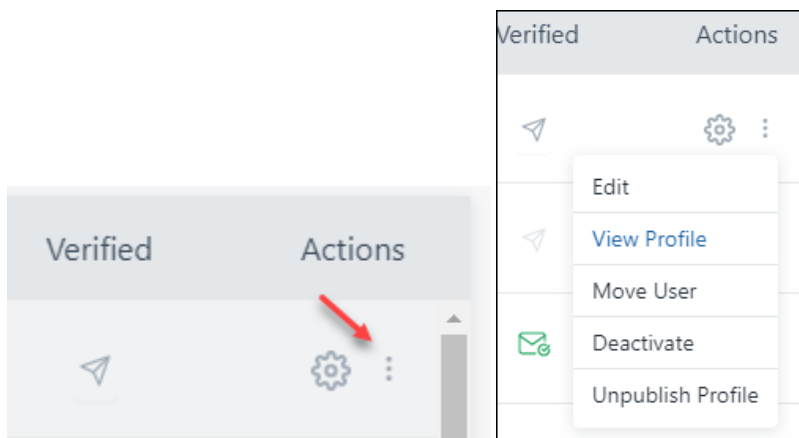


Type User name in “Search Box”

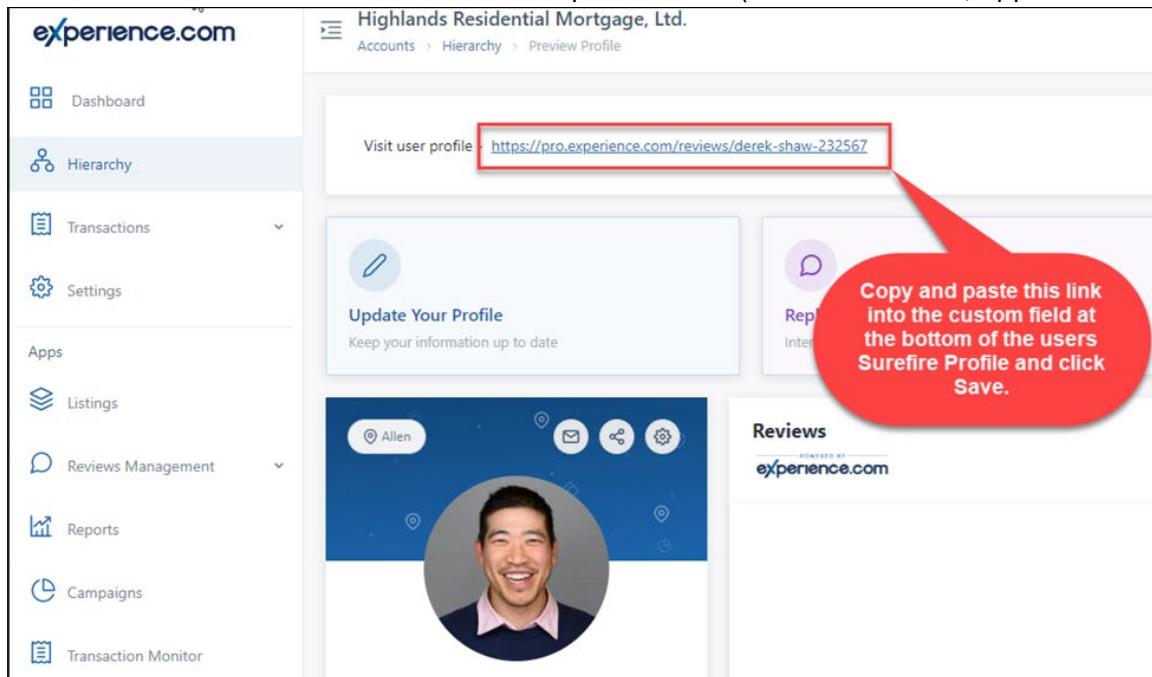




Click on Hamburger menu and select “View Profile”

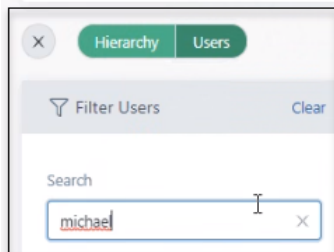


Link noted below will be utilized with Total Expert account (CUSTOM FIELD 3, Application URL)



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

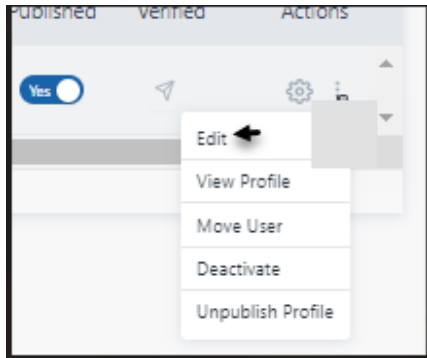
Click “Users” and type name




























Locate the user and click on “three dots”



Click on “Edit User”



| Profile Info  |   | Profile Settings |
|---|---|------------------|
|  Business Information          |    | ▼                |
|  Business Hours                |   | ▼                |
|  Address                       |   | ▼                |
|  Contact Information           |    | ▼                |
|  Social Media Links            |    | ▼                |
|  Images                        |    | ▼                |
|  Awards                        |    | ▼                |
|  Position                     |   | ▼                |
|  Products & Services Offered |    | ▼                |
|  Memberships                 |   | ▼                |
|  Specialities                |   | ▼                |
|  Achievements                |   | ▼                |
|  Hobbies                     |   | ▼                |
|  Licenses                    |    | ▼                |

### Add “Business Information”

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

### Edit Test User Information

Profile Info

Profile Settings

Business Information

^

Name •

Test

User

Publish Name •

Test User

Business Category

Mortgage

▼

Business Sub-Category

Please select

Title •

Loan Office

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**
Profile Settings

Business Information
Business Hours
Address
Contact Information

Phone Number •

(469) 402-1200

Ext

Mobile Number

Mobile Number

Custom Phone Number

(800)-323-3432

Website URL •

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](http://10.201.127.4:5000/fsdownload/ljgxjQRjU/03_Loan%20Officers)

Highlight picture and click enter, then click “Save”

