

1 Need to have a page the only annual subscribers have access to in their dashboard

Page will be called “Free Marketing Material”

I will have hundred of social media posts and editable guides they can use as a benefit of having an annual subscription

- We can integrate a pdf editor?
- Canva?

2 Can subscribers link their social media accounts to post directly from the dashboard

3 MORTGAGE CALCULATOR (needs to be optional for subscriber if they want to use)

- Can subscriber be notified by who used their mortgage calculator
- Can you convert an excel calculator to a web based form calculator like the mortgage calculator

4 Subscriber Text/Email/Call – CRM

- In the crm, can the subscriber click on a contact to email or text and open the messages app or email app
- Subscriber needs to be able to create custom questions in the CRM for answers
- Subscribers need to be able to export their CRM in some sort of XLS or CSV format
- Subscriber needs to receive email (and push notification when app is done) when CRM action is taken (need option to turn off crm and turn off notifications)

5 QR Code

- Need to be able to customize qr code
- How many qr codes can they create?
  - o Analytics on each QR code
  - o Name each qr code to keep track
  - o Analytics on NFC device taps

6 Icons

- All icons seem to just have a link but they don't all have the same functionality
- Contact card needs to have all the information to save in phone
- Social media links need to only require the username of the social media account
- Icons for custom links need to be editable (I see the option but it does not look like it works)

7 VCARD

- MAXIMUM 2 CARDS – or people will make more for other people
- Color selection does not work
- Need to be able change the order of the icons
- URL for profile must be subscriber's username and cannot change (so much setup a username without duplication at signup)

## 8 – FORMS

- Can we add web forms for subscribers to have their customers fill out
- Examples:
  - o Credit authorization form
  - o Verification of employment authorization form.
  - o Can subscriber's customers esign?