<u>Admin Portal (CCAP)</u>

The Control Centre Administration Portal (CCAP) can see all the internal workings within the infrastructure.

Admin Portal consisting of the following:

-**Home (dashboard)**

-**Quick Start**

- **Manage My Orders – pending, awaiting approval, completed, disabled**
- **Sales CRM & Calendar of Staff**
- **Today's Calendar**
- **Edit My Profile**

-Accounts

- **Add Customer**
- **Manage Customers**
- **Manage Finances**

-Admin Menu

- **Build Templates**
- **Staff**
- **Discount Codes**

Manage My Orders *Filtration System by*

- Tours pending.
  Tours waiting to be assigned to a photographer.

- Tours awaiting approval from end customer
  Can see the date the tours have been awaiting approval and who the tour is for.

- Tours being photographed.
  Can see the date ordered and who is photographing the tour.

- Tours Live.
  Can see the date the tour went live/ordered, who the customer is and who was assigned to the job.

- Tours disabled.
  Can see the date the tour was disabled, who the customer is and who was assigned to the job.

Notes:
Each status within the coordinating section has a searchable facility to search by customer, date, code or status.

Each job has a private note section where a photographer can write a private note to a coordinator about a specific job.

A CRM can be written for each job to organize schedules and write notes about the customer.

Sales CRM & Calendar

- Customer Relations.
  Admin can add a note, date, status, and reminder for a client or for a staff member for in-house notes or to organize photography shoots.

- Today's Calendar.
  Admin can see what is in their calendar for current work/notes.

- Edit My Profile.
  Admin can edit their own profile, subscribe to newsletters & change their password.

Notes:
Admin can search a staff members CRM at any time.
Admin can add a CRM for any staff member.

Accounts
- Add Customer
  Admin can add any customers, Select the state the customer is in and the "Account Manager" who will be servicing the client.
  Admin can set a "Credit Limit" for the customer.
  Admin can give the customer a username and password an enable the account.

- Manage Customers.
  Admin can search for a customer using the search engine.
  Admin can edit customer's details.
  Admin can place an order on behalf of any customer.
  Admin can see the customers tours.
  Admin can see the customer's accounts.
  Admin can create an invoice for a customer (negative invoices for adjustments).
  Admin can create a CRM note for a customer.

- Manage Finances.
  Admin can download and view all statements from every tour ordered and built.
  Admin can enter an invoice number and view a query.
  Admin can receive monies from a customer and pay on-behalf of their account.

Admin Menu

- Build Templates.
  Admin can build a template for a customer and place this into their account for the you build it or we build it system to streamline..

- Add Staff Member.
  Admin can add a staff member and give them certain privileges and auto activates their account.

- View Staff Member.
  Admin can search by state for a staff member.
  Admin can view the staff member's details and privileges.
  Admin can disable an account.
  Admin can view the CRM of the staff members account.

Tools

- Newsletter
  Admin can create newsletters.
  Admin can manage mailing lists.
  Admin can manage newsletter types.

- Discount Codes.
  Admin can administer a code for a client to use within the ordering process to receive a discount either by % or by dollar value.

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Order And Build A Tour For A Customer From CCAP (control centre admin portal)

Accounts ➔ Manage Customers

-Select customer.
-Place An Order.
-Select tour or service type.
-Type in property details through the order form..
-Return to home.

Note: Home will automatically be set to pending & Invoice has been automatically sent to the customer.
At this stage you can assign staff to each job, i.e. photography, constructor, graphic designer etc.

Status
You can assign a status to the property, i.e. Pending (Waiting until job assignement), Photographing (currently being photographed), Constructing (currently building a tour), Awaiting Approval (tour is waiting for customer to sign off on the tour) or Completed (tour or photography have been done)

Note: Once the order job specs sheet is fairly straight forward. You can write in-house notes to each person associated with the job. You can photo share and also write a CRM note for the customer,

Build A Tour (assuming photography has been done)

Step 1) NAME YOUR TOUR:
This name will be used to refer to the tour later, and is used as a reference on your invoice.

Step 2) SELECT AND EDIT YOUR TOUR TEMPLATE:
You have the ability to load an existing template style that you have made previously or you can customize your photo tour template with company color schemes and logos.

Step 3) ADD YOUR PHOTOS:

You can upload the photos of your property and surrounding areas. Our system will resize and compress your photos to fit within our system.

Step 4) SET THE ORDER OF YOUR PHOTOS:
Here you can choose the order of you photos, move photos to the front or back and select which gallery a photo is going into. i.e. Property For Sale Gallery, or About The Area Gallery

Step 5) ENTER ADDITIONAL INFORMATION:
You will be able to add features to your tour, such as, property information, mortgage calculators, floor plans, maps and register domain names.

Step 6) PUBLISH YOUR TOUR:
You have successfully built a tour. You can now view and pay for the tour or send it to any email address.

Note:
Unless this client has a credit amount, all the tours done will have "PENDING" across the photos until the tours have been paid for. – There is also a time duration to which tours will drop off line. So a good incentive for customers to pay for their tours. As Admin, you have the facility to delete the tours anyway. By navigating to the customer, viewing their tours and updating the status of that tour.

Assigning Roles:

Graphic Designer Control Centre

Portal consisting of the following:

Photos

- *-Graphic Designer can download photos assigned to them through the system.*
  -Graphic Designer can upload the "Final" files which will alert the Coordinator and customer.(if you allow them too)

Photographer Control Centre

Portal consisting of the following:

Photos

- Photographing.
  -Photographer can log in to see property details and will be able to shoot and upload the photos in their "RAW" state, ie non-manipulated. And alert either the graphic design and/or coordinator, once this is done either party can log in and "download" the RAW photos, clean them up and then "upload" the "Final" photos to the client.

  All photos will auto-delete after 8 days.

Constructors Control Centre

Portal consisting of the following:

Photos

- Constructing.
  -Constructor can log in to see property details and build a tour for a customer. They will be able to see the photos a photographer has taken in their "RAW" state and/or the "Final" photos the graphic designer has altered and download and use the photos to create the tour, by simply clicking on the "Build A Tour" icon.

  Remember, you do not have to assign these jobs to anyone. As an admin, you can do each role, ie, take the order, photograph the order and finally build the tour and upload the finished photos to the client. Its just a good system if you did have staff to distribute too.

Account Managers Control Centre

Portal consisting of the following:

- **Account Manager**
- **Sales CRM**
- **Accounts (not financial)**

Account Manager

- Live.
  -Account Manager can see the tours that are live which they have been assigned

- Disabled.
  -Account Manager can see the tours that are disabled that they are involved with or have been assigned to.

Sales CRM

- Customer Relations.
  Account Manager can add a note, date, status, and reminder for a client.

- Today's Calendar.
  Account Manager can see what is in their calendar for current work/notes.

Accounts

- Add Customer.
  Account Manager can add any customers.
  Account Manager can give the customer a username and password an enable the account.
  They cant however re-assign the account to another account manager and/or give the customer a credit limit or see the customers invoices.

- Manage Customers.
  Account Manager can search for a customer using the search engine.

Account Manager can edit customer’s details.
Account Manager can place an order on behalf of any customer.
Account Manager can see the customer’s tours and disable them.
Account Manager can create a CRM note for a customer.

<u>Broker/Coordinators Control Centre</u>

Portal consisting of the following:

Home (dashboard)

-**Quick Start**

- **Manage My Orders – pending, awaiting approval, completed, disabled**
- **Sales CRM & Calendar of Staff**
- **Today’s Calendar**
- **Edit My Profile**

-Accounts

- **Add Customer**
- **Manage Customers**
- **Manage Finances**

-Admin Menu

- **Build Templates**
- **Staff**
- **Discount Codes**

Manage My Orders

Can see the date the tour was ordered, who the customer is and assign the job to your staff member.

Notes:
Each status within the coordinating section has a searchable facility to search by customer, date, code or status.

Each job has a private note section where a photographer can write a private note to a coordinator about a specific job and vice versa.

A CRM can be written for each job to organize schedules and write notes about the customer.

Sales CRM

- Customer Relations.
  Coordinators can add a note, date, status, and reminder for a client or for a staff member for in-house notes.

- Today’s Calendar.
  Coordinators can see what is in their calendar for current work/notes.

Notes:
Coordinators can search their staff members CRM at any time.
Coordinators can search their can add a CRM for their staff member.

Accounts

- Add Customer.
  Coordinators can add any customers; Select the state the customer is in and the "Account Manager" who will be servicing the client.
  Coordinators can set a "Credit Limit" for the customer.
  Coordinators can give the customer a username and password an enable the account.

- Manage Customers.
  Coordinators can search for a customer using the search engine.
  Coordinators can edit customer's details.
  Coordinators can place an order on behalf of any customer.
  Coordinators can see the customers tours.
  Coordinators can see the customer's accounts.
  Coordinators can create an invoice for a customer (negative invoices for adjustments).
  Coordinators can create a CRM note for a customer.

- Manage Finances.
  Coordinators can download and view all statements from every tour ordered. and built within their account.
  Coordinators can enter an invoice number and view a query.
  Coordinators can receive monies from a customer and pay on-behalf of their account.

Staff

- Add Staff Member.
  Coordinators can add a staff member and give them certain privileges and auto activate their account.

- View Staff Member.
  Coordinators can search by state for a staff member.
  Coordinators can view the staff member's details and privileges.
  Coordinators can disable an account.
  Coordinators can view the CRM of the staff members account.

Tools

- Discount Codes.
  Coordinators can administer a code for a client to use within the ordering process to receive a discount either by % or by dollar value. This will be set by Admin.

Coordinators have the ability to assign more than one task to the log in for a staff member as shown below:
In this case, the photographer can make accounts for clients and service them.

<u>Photographer & Account Manager Control Centre</u>

Portal consisting of the following:

- **Account Manager**
- **Sales CRM**
- **Accounts**

Account Manager

- Photographing
  -Account Manager can see property details

- Live
  -Account Manager can see the tours that are live.

- Disabled
  -Account Manager can see the tours that are disabled.

Sales CRM

- Customer Relations
  Account Manager can add a note, date, status, and reminder for a client.

- Today's Calendar
  Account Manager can see what is in their calendar for current work/notes.

Accounts

- Add Customer
  Account Manager can add any customers.
  Account Manager can give the customer a username and password an enable the account.

- Manage Customers
  Account Manager can search for a customer using the search engine.
  Account Manager can edit customer's details.
  Account Manager can place an order on behalf of any customer.
  Account Manager can see the customer's tours and disable them.
  Account Manager can create a CRM note for a customer.

<u>Additional Control Centre functionality</u>

Profile
User can change their profile at anytime.

Support
Virtual Homes has a 24 support service in which staff and customers can email or skype.

Download
The Control Centre has many downloads including all the latest browsers. Plugins, image resize and autostitch.

Terms
Virtual Homes has the terms and conditions of use within the Control Centre, which can be changed to suit your business model.

Customers Control Centre

Portal consisting of the following:

- **ORDER A PRODUCT**
- **MANAGE MY ORDERS**
- **BUILD A TOUR ONLINE**
- **MANAGE MY TOURS**
- **MY FINANCES**
- **MY DOWNLOADS**

My Account

- Photography
  -If a customer has ordered photography, they can download High- Resolution images from here either by thumbnail or all at once.

- My Pending Tours
  -We Build It
  - Any tours that have been ordered for us to build on behalf of the customer and the tours are pending photography; the customer can see these tours by selecting this link

  -You Build It
  - Any tours that have been built by a customer which have been finished can accessed by clicking on this link.

- My Live Tours
  -Customer can view and filter all tours that are live, You Build It, We Build It.

- My Disabled Tours
  Customer can view and filter all tours that are disabled, You Build It, We Build It.

- View All Tours
  Customer can view and filter all tours that You Build It, We Build It.

- My Tour Statistics
  Customer can see and print off graphical information about each tour.

- Edit My Tours
- *Customer can select and edit both We Build It and You Build It.*

We Build It - *Order a Product/Service*

- Photo Tour
  -Customer can order a photo tour by entering the appropriate information into a form which will be automatically sent through to admin.

- Virtual Tour
  -Customer can order a virtual tour by entering the appropriate information into a form which will be automatically sent through to admin.

- Photography
  -Customer can order photography by entering the appropriate information into a form which will be automatically sent through to admin.

- View All Services
  Customer can view additional services that Virtual Homes offers, such as professional web design services or software development.

You Build It -

- Photo Tour
  -Customer can build their own photo tour. (Process Below)

Step 1) NAME YOUR TOUR:
This name will be used to refer to the tour later, and is used as a reference on your invoice.

Step 2) SELECT AND EDIT YOUR TOUR TEMPLATE:
You have the ability to load an existing template style that you have made previously or you can customize your photo tour template with company color schemes and logos.

Step 3) ADD YOUR PHOTOS:
You can upload the photos of your property and surrounding areas. Our system will resize and compress your photos to fit within our system.

Step 4) SET THE ORDER OF YOUR PHOTOS:
Here you can choose the order of you photos, move photos to the front or back and select which gallery a photo is going into. i.e. Property For Sale Gallery, or About The Area Gallery

Step 5) ENTER ADDITIONAL INFORMATION:
You will be able to add features to your tour, such as, property information, mortgage calculators, floor plans, maps and register domain names.

Step 6) PUBLISH YOUR TOUR:
You have successfully built a tour. You can now view and pay for the tour or send it to any email address.

- Virtual Tour
  -Customer can build their own photo tour. (Process Below)

Build A Tour

Step 1) NAME YOUR TOUR:
This name will be used to refer to the tour later, and is used as a reference on your invoice.

Step 2) SELECT AND EDIT YOUR TOUR TEMPLATE:
You have the ability to load an existing template style that you have made previously or you can customize your photo tour template with company color schemes and logos.

Step 3) ADD YOUR PHOTOS:
You can upload the photos. Our system will resize and compress your photos to fit within our system.

Step 4) ADD HOTSPOT ICONS:
Here you can select part of an image and click "Create Hotspot" and selects the photo that the hotspot is linking to.

Step 5) ADD FLOORPLAN:
Here you can upload a floorplan, select part of an image and click "Create Hotspot" and select the photo that the hotspot is linking to.

Step 5) ENTER ADDITIONAL INFORMATION:
You will be able to add features to your tour, such as, property information, mortgage calculators, floor plans, maps and register domain names.

Step 6) PUBLISH YOUR TOUR:
You have successfully built a tour. You can now view and pay for the tour or send it to any email address.

Note:
Unless this client has a credit amount, all the tours done will have "SAMPLE" across the photos until the tours have been paid for.

- E-Book
  -Customer can build their own e-Book. (Process Below)

Step 1) NAME YOUR TOUR:
This name will be used to refer to the tour later, and is used as a reference on your invoice.

Step 2) ADD YOUR PAGES:
You can upload the JPG's or SWF files... Our system will resize and compress your pages to fit within our system.

Step 3) SET THE ORDER OF YOUR PAGES:
Here you can choose the order of you pages, move photos to the front to back.

Step 4) PUBLISH YOUR TOUR (e-Book):
You have successfully built a tour. You can now view and pay for the tour or send it to any email address.