

1 What happens once I install the mio app from AgencyCloud AppMarket?

mio will receive an automated notification from Reapit of which customer has installed the mio app. Our Client Services team will make contact to confirm some details & (when the Reapit customer has multiple branches) establish login requirements for branches before setting up your mio account & switching on the integration per branch. This whole process should get completed within 2 working days.

2 Getting started - what about training?

mio is very intuitive to operate but we do provide free training & support which is delivered online via a group meeting using Zoom or Microsoft Teams. Our team will ask you about this when they process your account details.

3 How many staff can have a login to mio?

Any number of staff can have a login

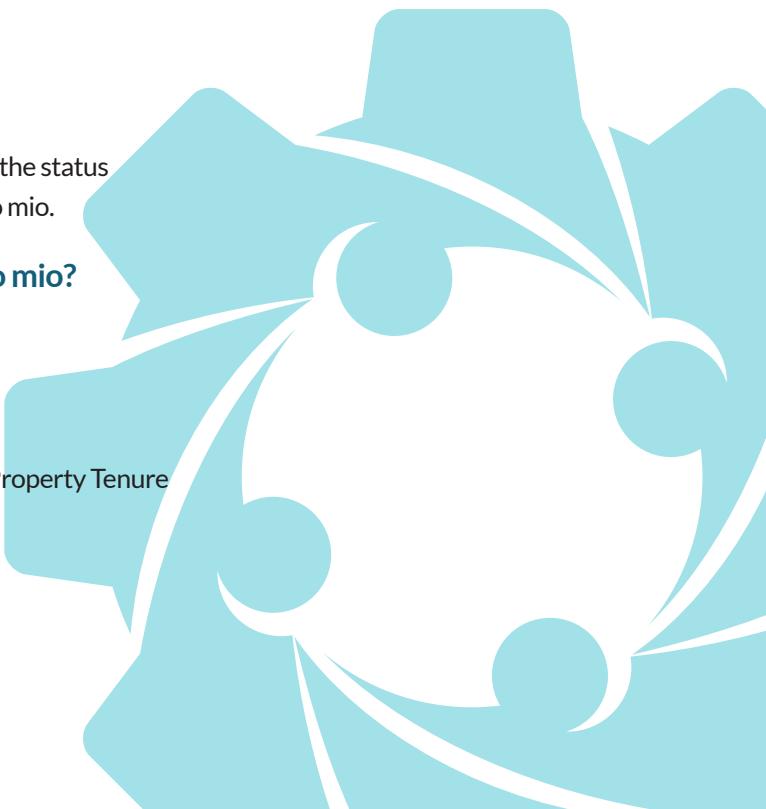
4 When will my sale record been sent to mio?

As soon as you have agreed a Buyer in AgencyCloud & moved the status to Under Offer or STC. Properties For Sale will not get sent to mio.

5 What information is sent from AgencyCloud to mio?

AgencyCloud is the master record in this integration because the information it holds is used for other purposes in addition to sales progression i.e., generating memos & invoices.

- Property information, including:
Listed price, Sale Price, Agent Fee, Agent Fee Percentage, Property Tenure
 - Vendor information
 - Buyer information
 - Acting law firm & list of lawyers
 - Financial firm & list of advisers.



6 What is the frequency of updates?

Once the property is proceeding with an agreed Buyer, mio will automatically check for any updates to the Vendor and Buyer information each time you access the mio record to ensure they remain in sync with AgencyCloud. Changes to the law firm or mortgage broker firm will also feed through.

Details about the agreed sale price and your fee will not get updated since this rarely changes once the sale has been agreed, but on the rare occasion it does you can manually edit in mio.

7 What information is sent from mio to AgencyCloud?

A copy of all sales progression notes and chat messages will automatically get generated as separate PDF documents and sent back to AgencyCloud for record keeping purposes once the status changes from Sales Agreed to:-

- Exchanged
- Completed (updated documents will overwrite the previous version)
- Withdrawn from market altogether
- If a buyer withdraws

8 Why do I have to manually select a lawyer person in mio?

AgencyCloud integration does not handle a lawyer person with the chosen law firm. To make it easier for you, when we receive the details of the law firms acting for the Vendor & the Buyer, we pull through from your AgencyCloud, all the existing lawyer persons recorded against those companies & store them in mio. This makes it easy to select from our drop-down list, or you can add a new person.

9 Why doesn't mio update the AgencyCloud status?

Simply because AgencyCloud is the master record & mio doesn't hold the additional information that AgencyCloud requests from a user when transitioning across status type

10 Why aren't AgencyCloud milestones sent to mio?

By installing the mio app it becomes your chosen sales progression software with which to manage your pipeline so it makes sense to just update the mio milestones which then inform the mio chain view.

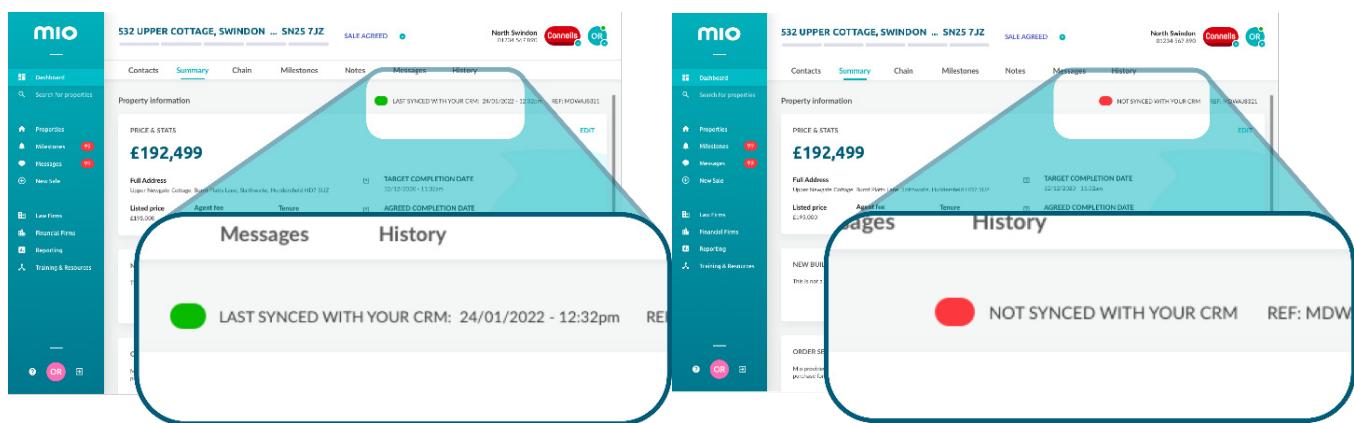


11 Why aren't some of my existing mio sales in sync with AgencyCloud?

This only applies to customers who have an existing mio account.

When a new sale is sent to mio we link the AgencyCloud property reference number with a new mio reference which allows us to keep the two records in sync. Trying to retro fit a sync with an existing sale in mio which is already progressed is complex & would lead to a different user experience vs a new sale which we want to avoid.

To help with this we've designed an indicator in mio to identify when a property was last synched with AgencyCloud.



12 In AgencyCloud I've selected a person within the law firm. Why hasn't this pulled through to mio?

AgencyCloud integration doesn't give mio the information on the specific person, so we pull through all of the contacts against a particular law firm and allow the user to make their selection from mio.

13 My Vendor and/or Buyer phone numbers in mio are not the same as the record in AgencyCloud?

AgencyCloud integration only offers mio the first number associated to a Vendor or Buyer record (same with email addresses) so if a contact in AgencyCloud has multiple phone numbers, AgencyCloud just sends through the first number. This is the same with email addresses. Should you occasionally experience this, updating AgencyCloud will update your mio record with the correct information.

14 Why hasn't an email address pulled through for either my Vendor and/or Buyer?

We validate the format of email addresses because that is how the invite to consumers to register and use the mio app is handled. Please check that the email has been entered correctly in AgencyCloud.