Clarity | BENEFIT SOLUTIONS™

PORTAL BROKER ENHANCEMENTS

CLARITY BENEFIT SOLUTIONS BROKER ONBOARDING GUIDE

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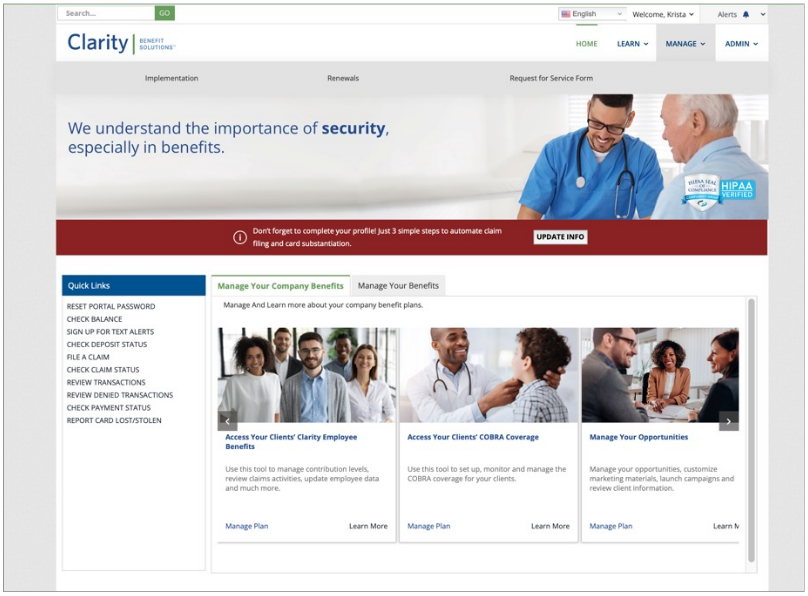
HOW TO ACCESS YOUR **NEW BROKER FEATURES**

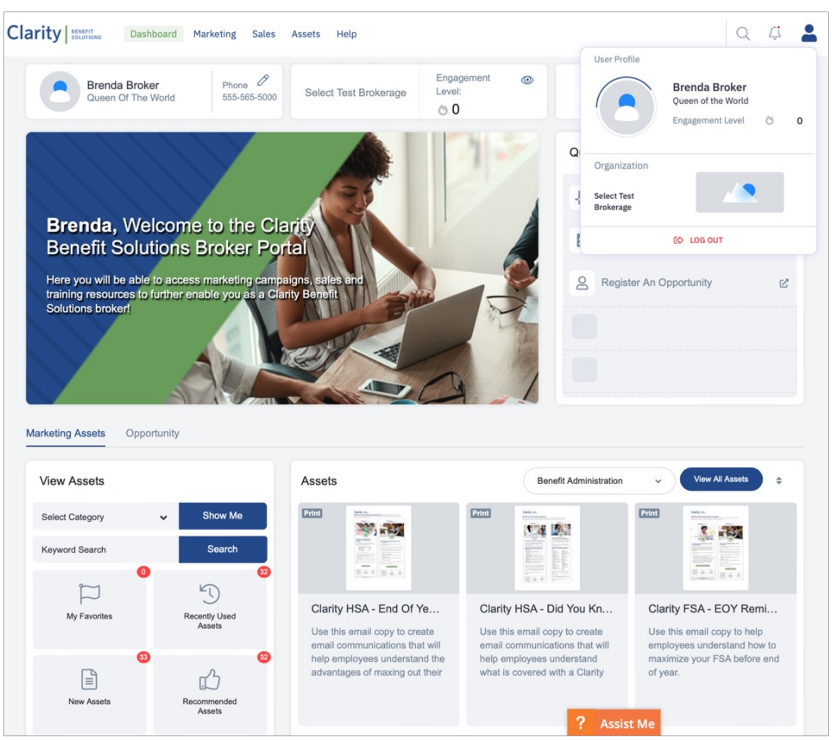
1 . Log into Clarity Portal.

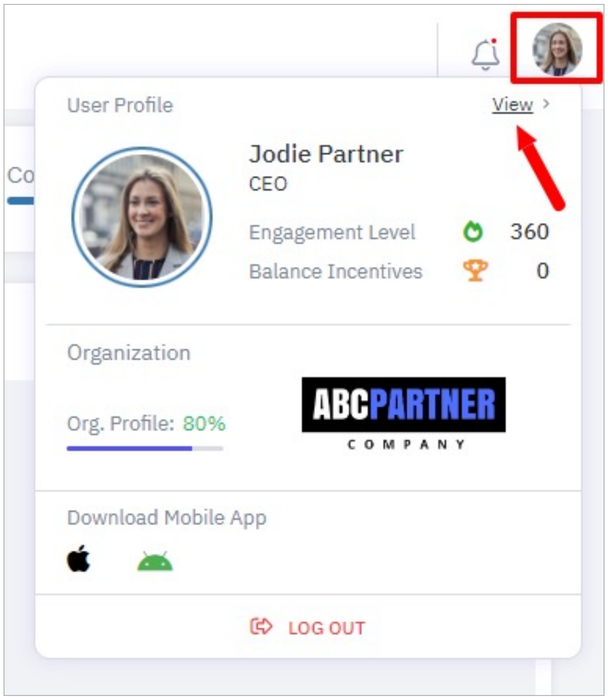


2. Either click on the **Manage your Opportunities** tile or in the **Manage** menu, select one of the following:
   - **Enter a New Opportunity**
   - **Access Marketing Assets and Campaigns**
   - **Review Your Clarity Client List**
   - **Review Your Clarity Leads**

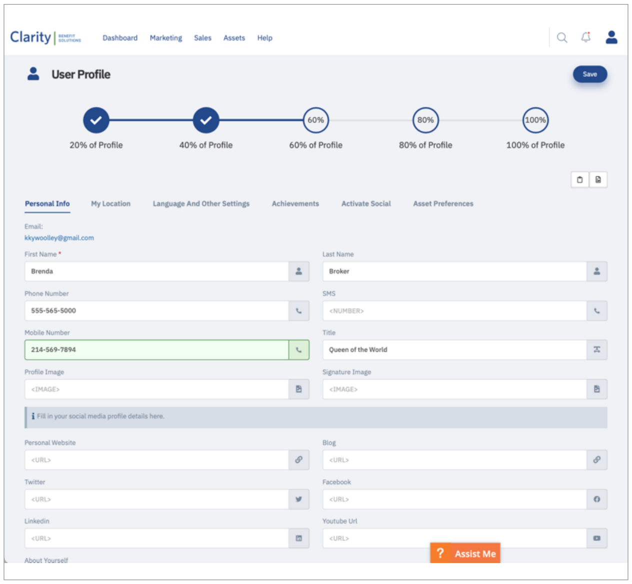
SET UP YOUR **PROFILE** AND YOUR **COMPANY**.

1. Agree to the **Terms and Conditions**
2. Click on the person icon in the top right corner.





3. In the box that appears Hover on the user profile and click **View**. This will open your user profile for editing. This area includes both a **Personal Info** and **My Location** tab, **Language and Time Zone Settings**, an **Activate Social** tab for your social media info as well as an **Asset Preferences** tab.



4. In the **Personal Info** section, ensure your personal information is correct and be sure to upload your profile image and provide your Twitter, Facebook and LinkedIn URL links.

   Note: This information will be used to personalize the individual contact information of any communications sent from your account.

5. In the **My Location** section, ensure your shipping address is correct and upload your company logo. Also provide your company description in the **About Company** section.

   Note: The logo and company description you provide will populate in your customized marketing assets.

6. In the **Language and Other Settings** section, let us know the time zone you are located, the language you prefer and select email.

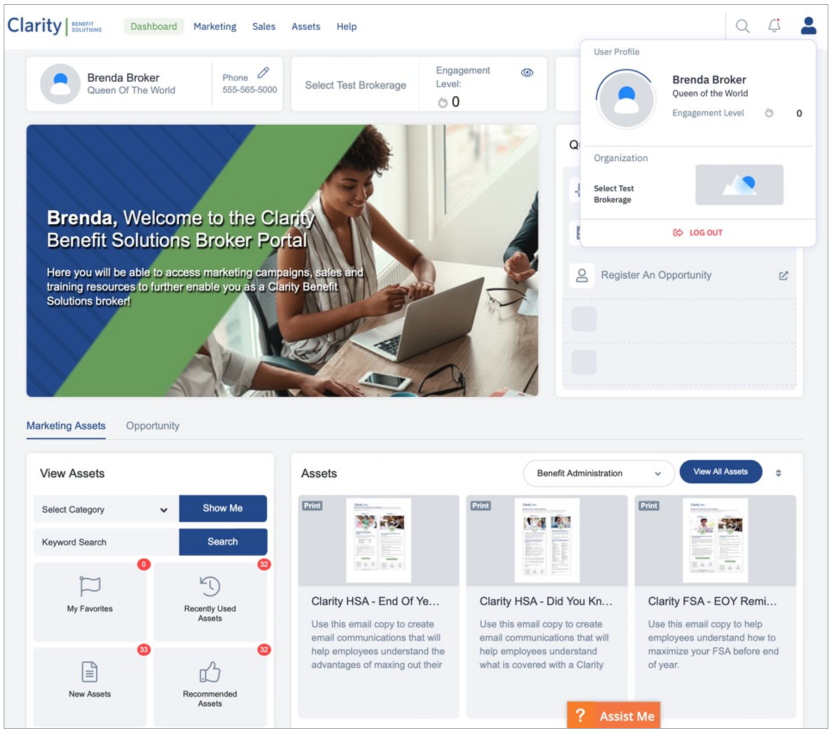
   Note: This impacts when your emails are sent out through this email service.

7. Complete the **Activate Social** and **Asset Preferences** sections.

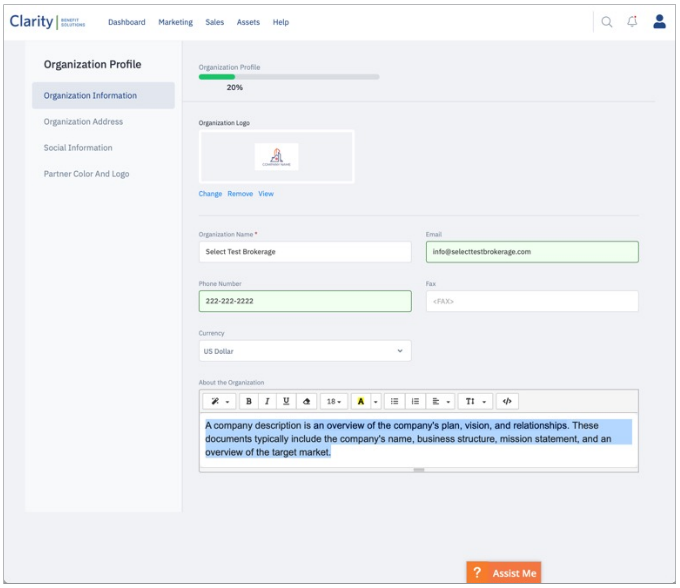
8. Click **Save**.

COMPLETE YOUR **ORGANIZATION PROFILE**

1. Click on the **person icon** in the top right corner.

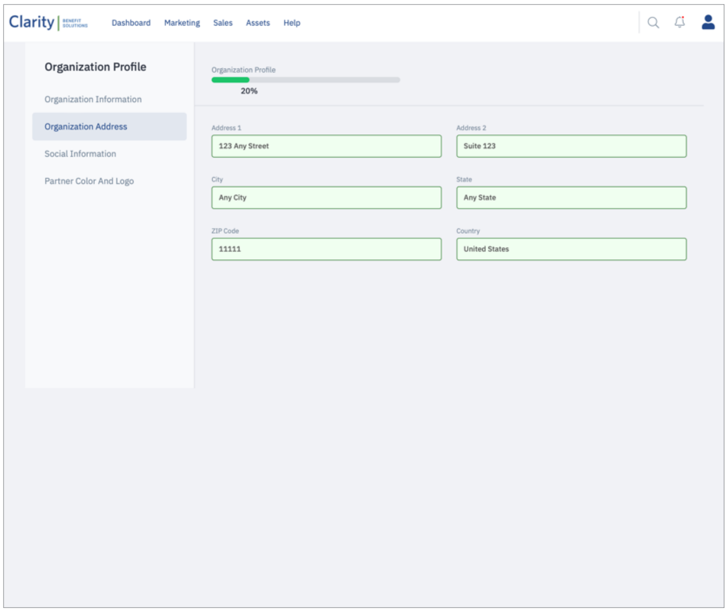


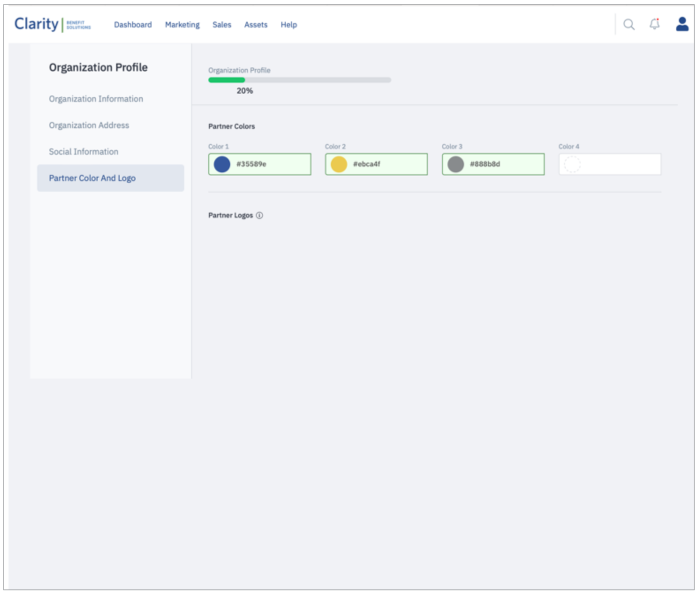
2. In the box that appears Hover on the **Organization Section** and click **View**. This will open your Organization Profile for editing. This area includes a **Organization Information** and **Organization Address** tab, **Social Information**, and **Color and Logo** tab.

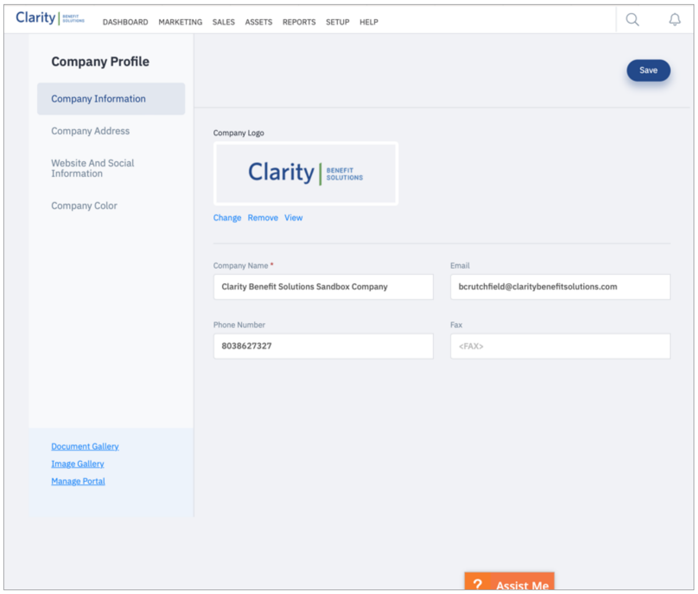


3. Within **Organization Profile**, enter your Organization Address, Social Information and Company colors and logo.

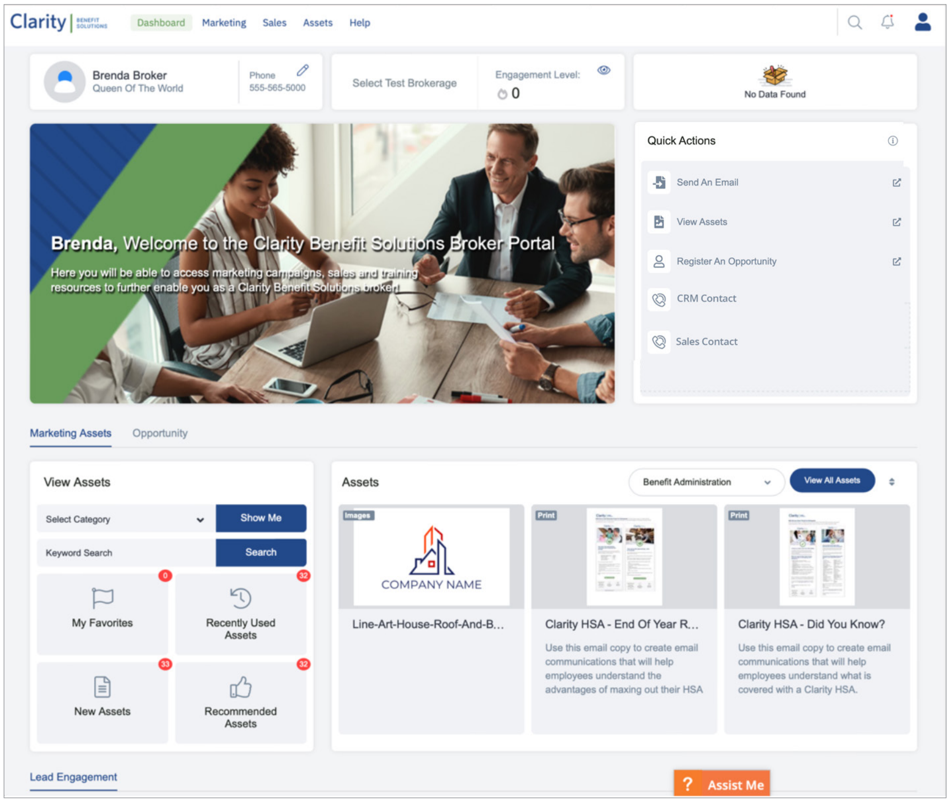
Note: The Colors and Logo section is for you to tell us what colors to apply to your marketing assets and provide any additional versions of your company logo.







HOW TO READ YOUR **DASHBOARD**



Top Menu

Marketing

The Marketing menu is where you will access assets, emails, drip campaigns and social posts. All these assets can be customized on this site. You can also access your lead lists.

Sales

In the Sales menu you can access a list of the clients (by contact or account) you currently have with Clarity as well as any opportunities you have entered.

Assets

The Assets menu will take you directly to the Asset Library where you can search for assets to customized based on type of product.

Under the Menu you will see:

- Your name, title, phone, brokerage level, and your contacts within Clarity.
- Your engagement level, which pertains to your usage of these features.

Quick Actions

- You can use the **Quick Actions** section to quickly access the most used features.

Tabs

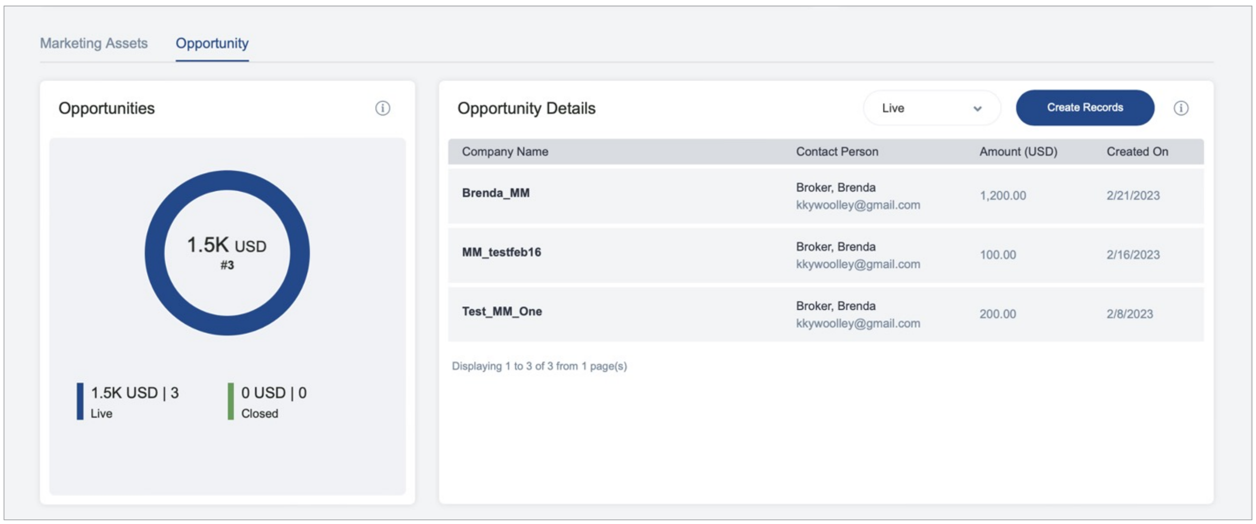
- Below the banner image there are three tabs: Marketing Assets, Opportunity and Lead Engagement.

Marketing Assets

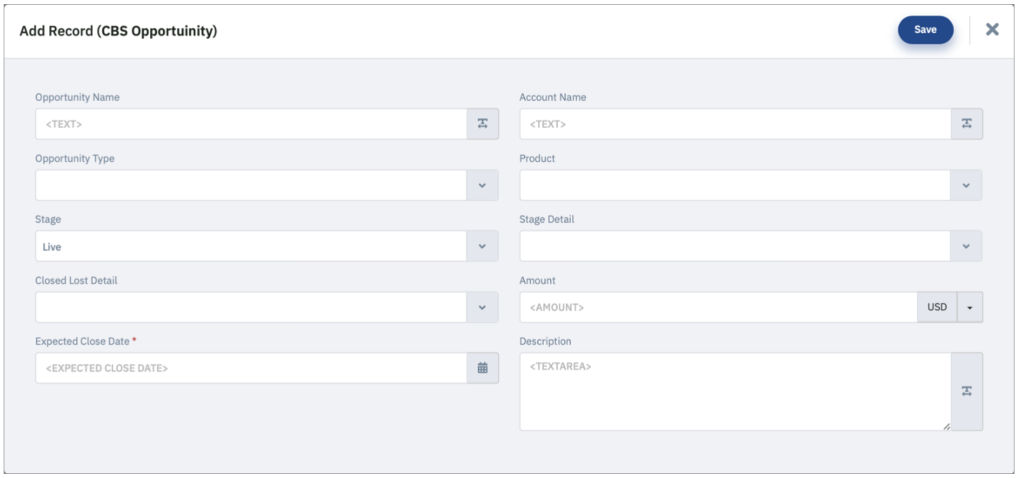
- Under **Marketing Assets** in the **View** tile, you can quickly access and search for available assets.
- This tile will also show you any assets you have marked as favorite, ones you have recently viewed, any new assets added by Clarity and assets recommended for you.
- Under **Marketing Assets** in the **Assets** tile, you can quickly access and search for available assets. You can search and view assets.

Opportunity

- Under **Opportunity** you can quickly see the number of live and closed opportunities, and view details of the opportunities you have entered.



- To enter a new opportunity and alert your Clarity sales contact, simply click the "**Create Record**" button, fill out the necessary fields and click **Save**.



- This new opportunity will now be listed in your dashboard and your sales contact will reach out to discuss and provide you a quote.

Lead Engagement

- Under Lead Engagement you can see how your Clarity leads are performing based on how they interact with your campaigns.