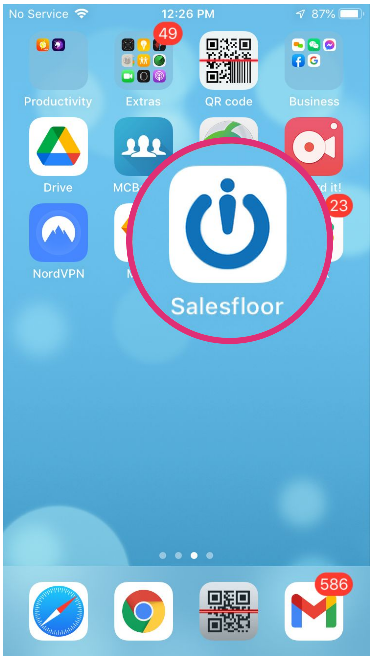
Salesfloor

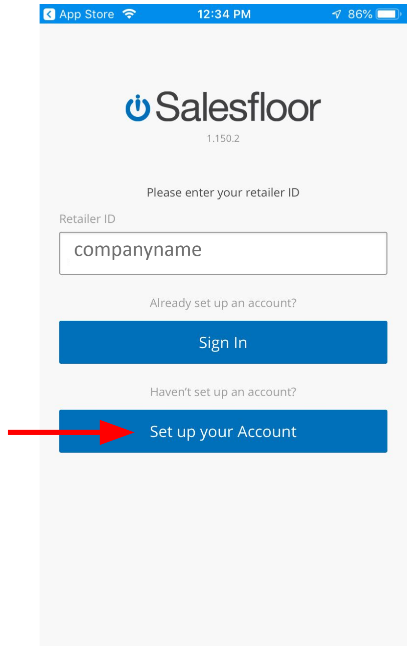
SALESFLOOR FEATURE GUIDE

ACTIVATING YOUR ACCOUNT

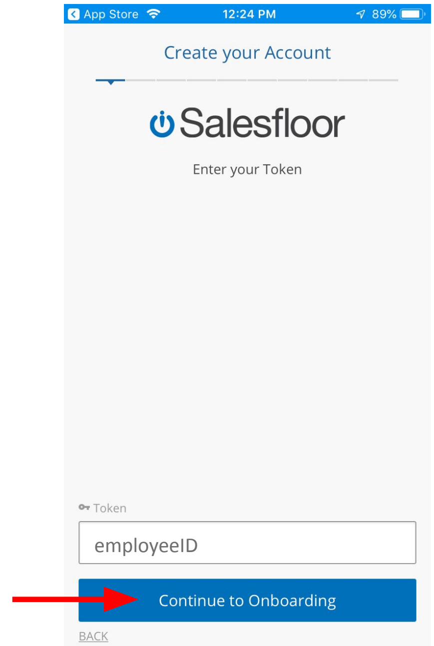
Step 1: Download the Salesfloor app from the App Store or Play Store



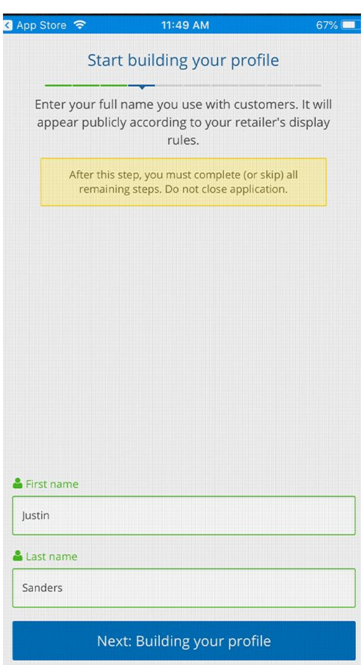
Step 2: Enter the retailer ID as your company's name in lowercase letters to set up



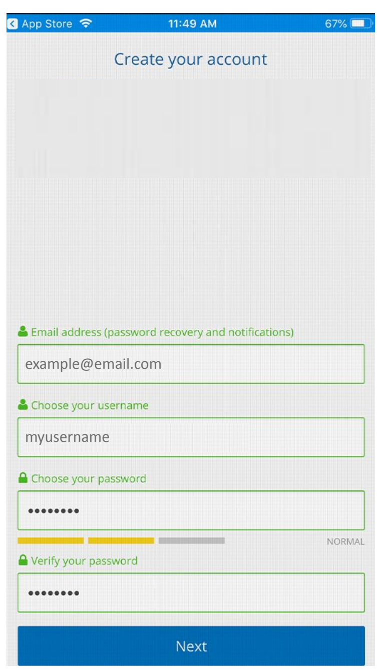
Step 3: Enter your employee ID as your token and select "*Create Account*"



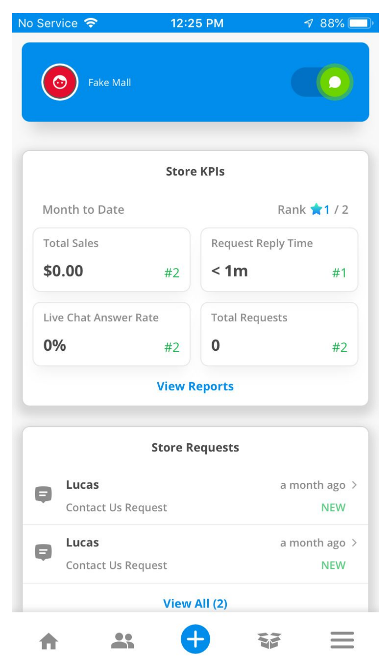
Step 4: Complete each onboarding step in the app



Step 5: Take note of your username & password

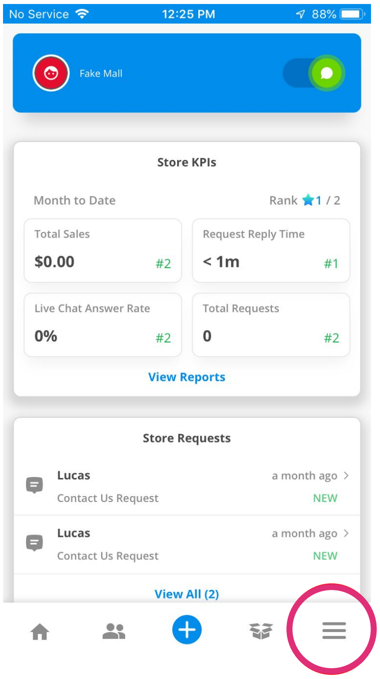


Step 6: Explore your new Salesfloor account!

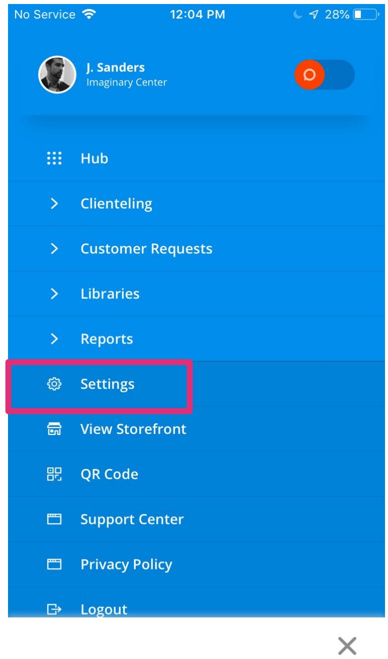


Salesfloor | IAVIGATING YOUR ACCOUNT SETTINGS

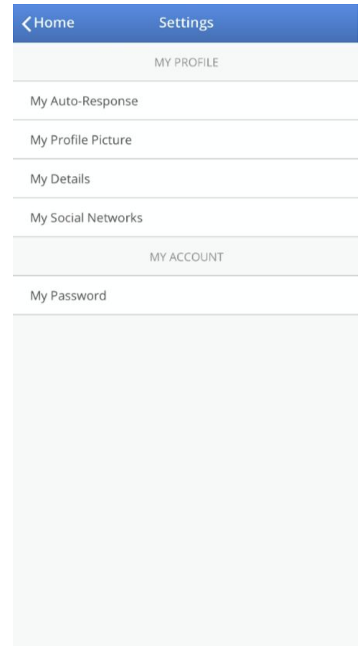
Step 1: On your app's homepage, open the *side menu.*



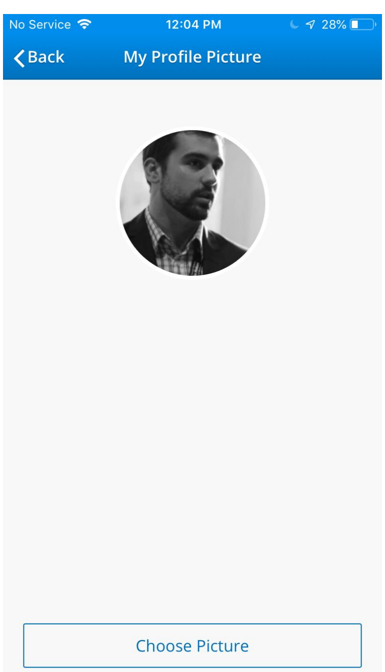
Step 2: Select *Settings.*



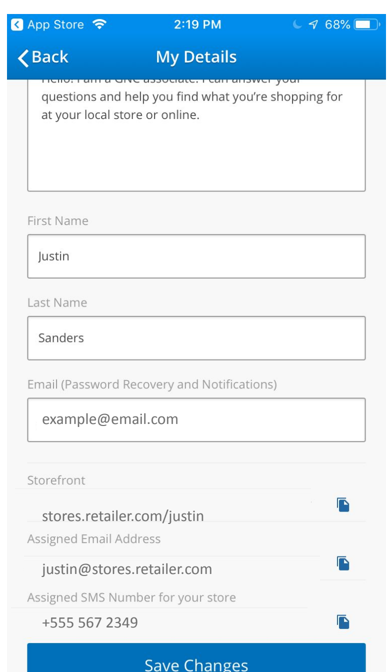
Step 3: Review your available settings



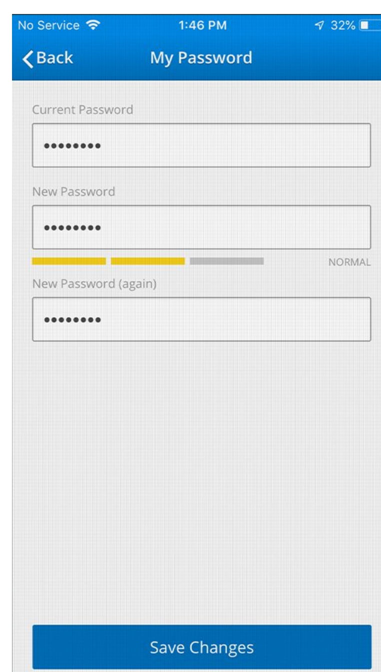
Step 4: Select *My Profile Picture* to update your account's profile picture



Step 5: Select ***My Details*** to edit your store's About Me bio, view your Storefront URL, and assigned email & texting number



Step 6: Select ***My Password*** to change your account's password.

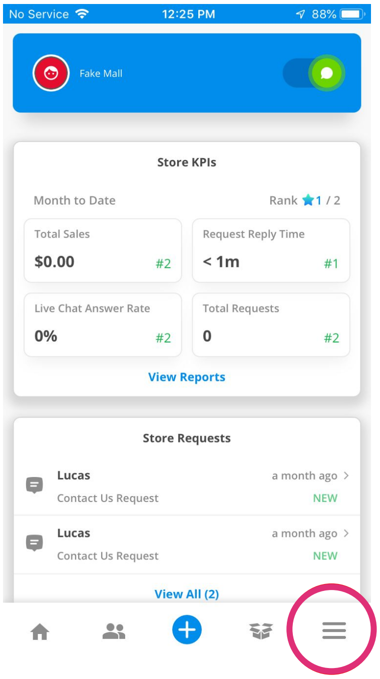


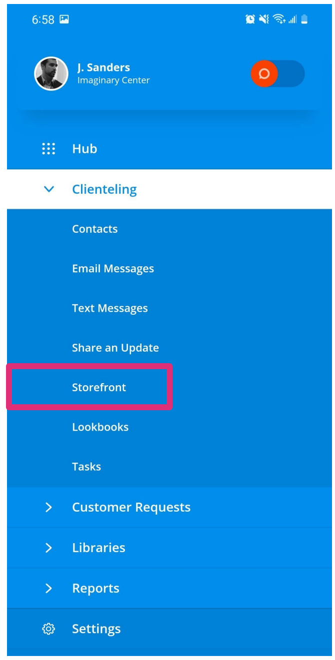
Salesfloor | CUSTOMIZING YOUR STOREFRONT

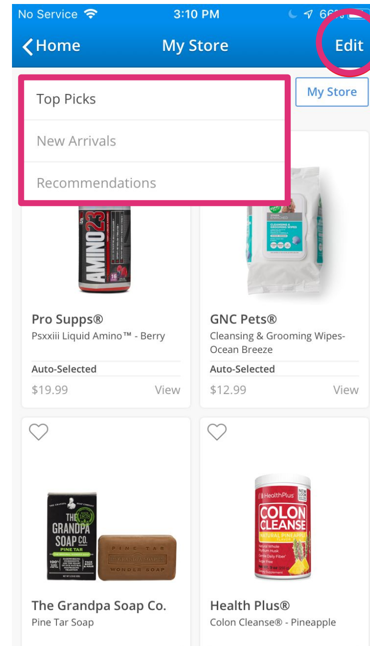
Step 1: On your app's homepage, open the side menu.

Step 2: Select Storefront under clienteling in the menu.

Step 3: Select the section you want to edit with the drop down, then press "Edit"



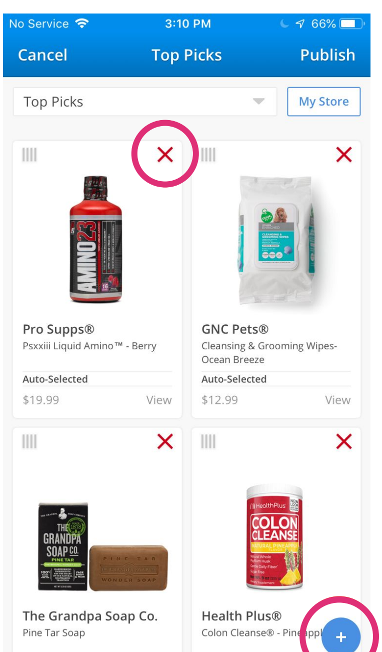


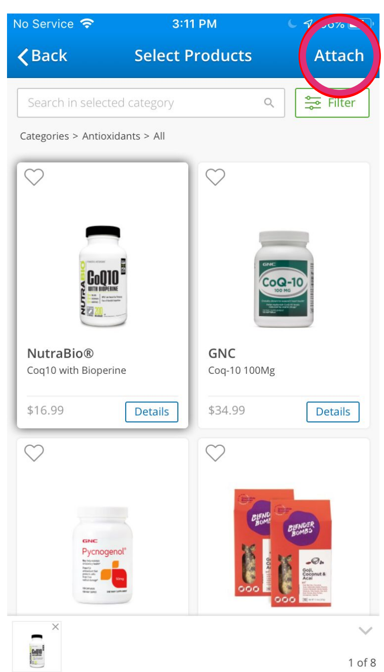


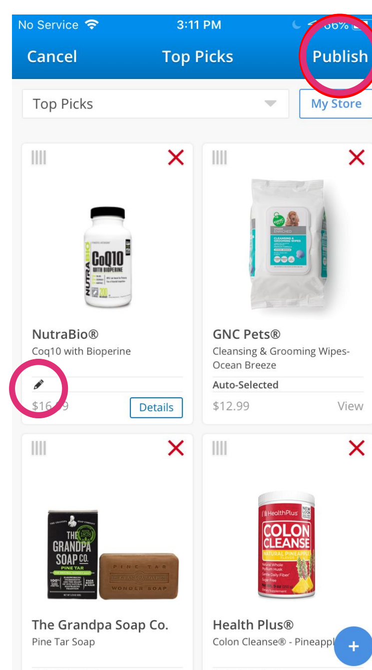
Step 4: Use the x to remove items, and the + to add new items to your Storefront

Step 5: Select the products that you want to add, then Attach to confirm your selections

Step 6: Select Publish in the top right corner to save your changes.







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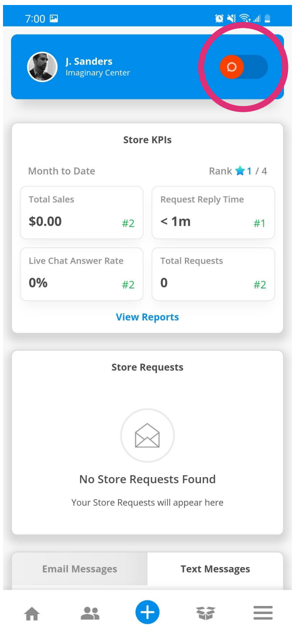
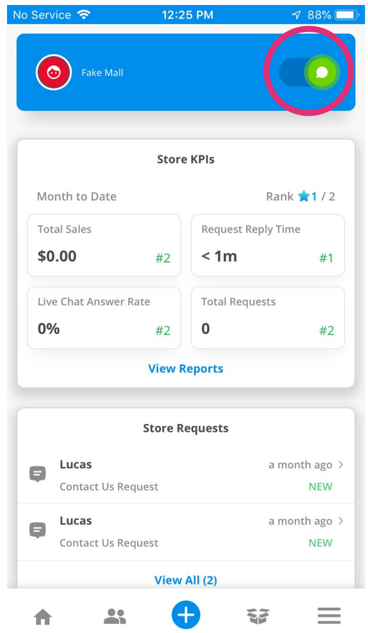
LIVE CHATTING WITH YOUR CUSTOMERS

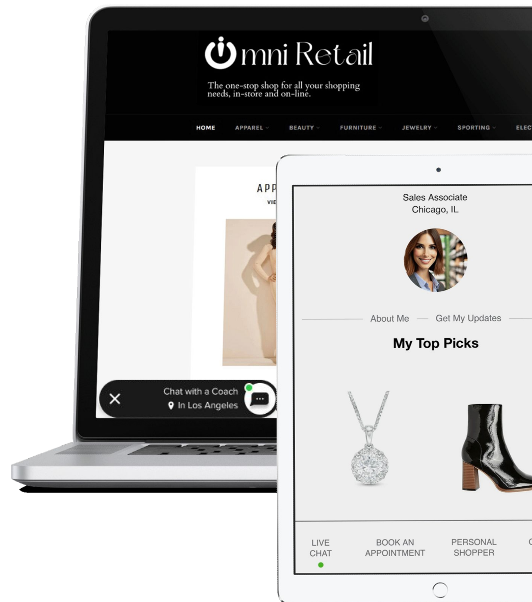
Step 1: Red means that you're unavailable. To become available for chat, select the Live Chat button on your homepage

Step 2: Green means that you are now available and ready to receive Live Chat requests from your customers

Step 3: When available, your customers can submit Live chat requests through your Storefront or the Salesfloor Connect widget



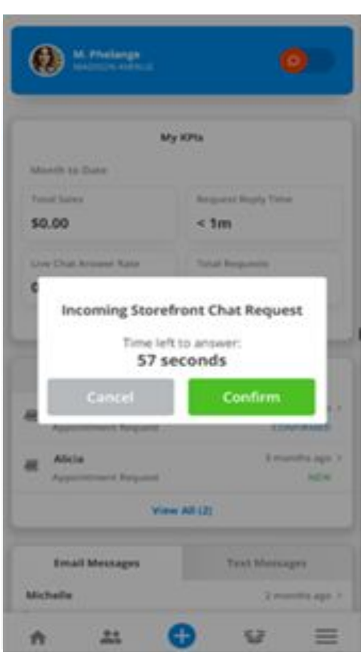


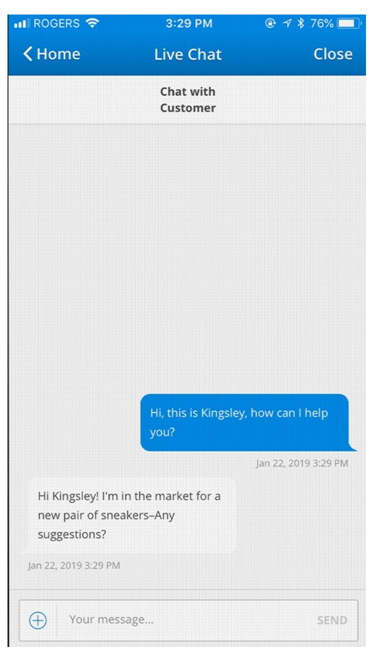


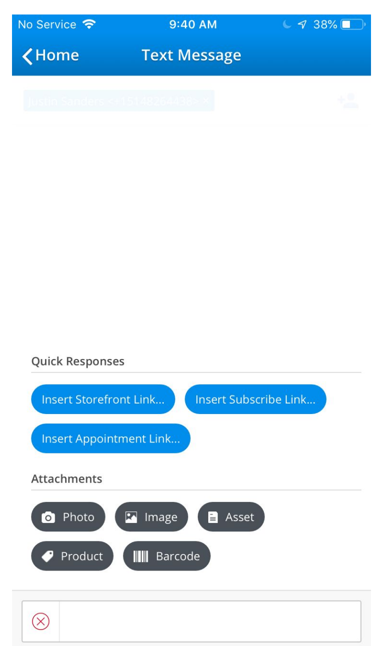
Step 4: When you are receiving a Live Chat, your device will ring and a push notification will allow you to accept the request

Step 5: Once accepted, you will be engaged with the client in a real-time chat conversation to help address their needs

Step 6: Use the + icon beside your text box to add assets, products, and photos to your conversation, or benefit from other quick chat actions.







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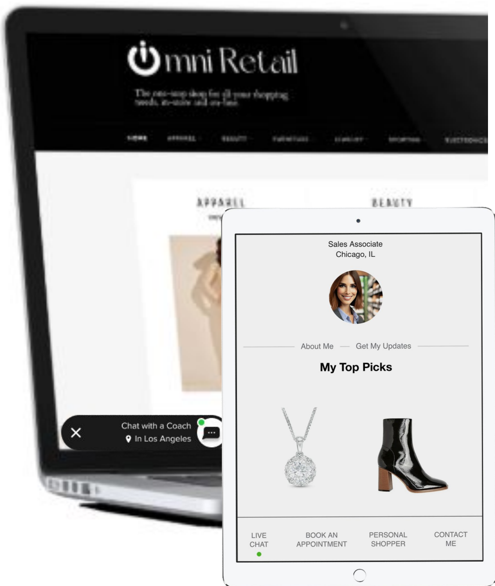
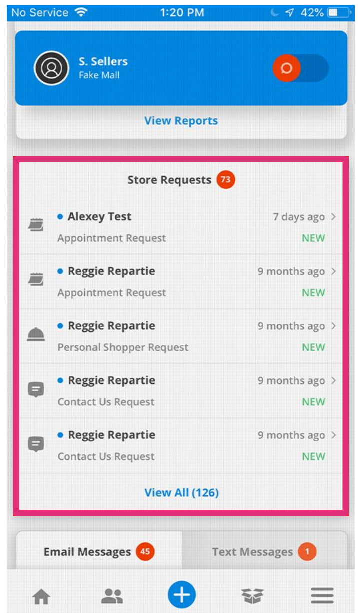
RESPONDING TO CUSTOMER REQUESTS

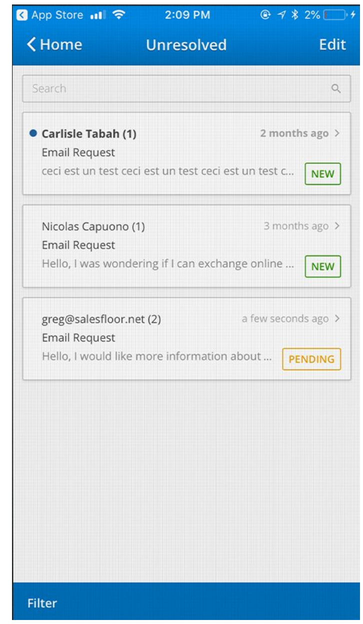
Step 1: Your clients can submit customer requests at any time through your Storefront or through the Salesfloor Connect widget.



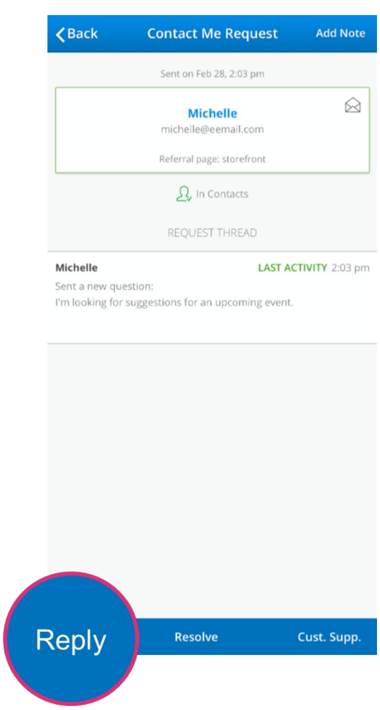
Step 2: Any request submitted via your Storefront will go to your Store Requests inbox. Requests submitted via the widget can be found in the New Leads inbox.



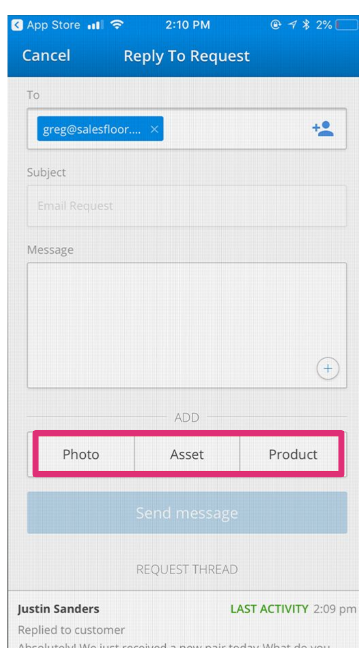
Step 3: New requests require your attention as soon as possible & pending requests indicate that you're waiting for a response from your client



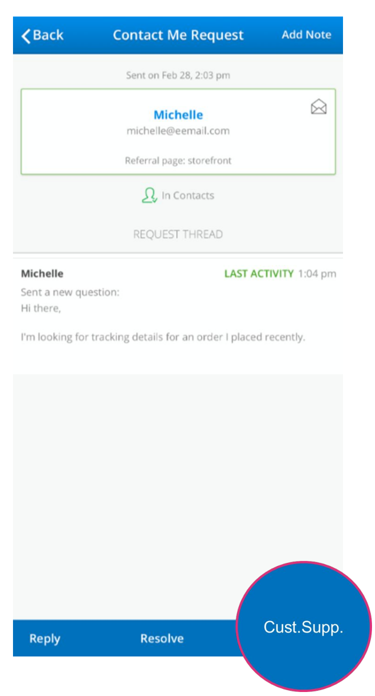
Step 4: By selecting any customer request in your inbox you can review the conversation and reply to the thread



Step 5: When replying to a customer request, you can add any photos, assets, or products to help address your clients' needs.

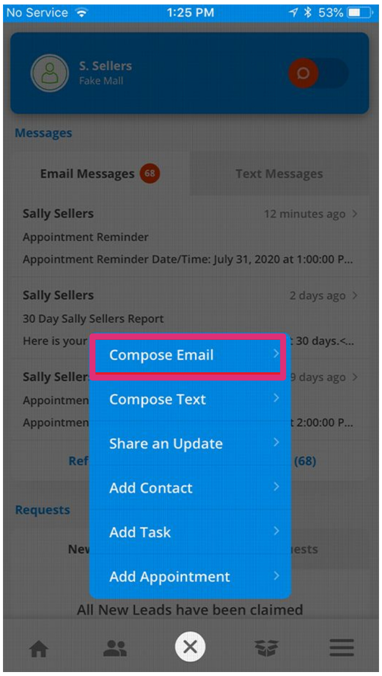


Step 6: For any request requiring the attention of your retailer's Customer Service team, you can forward your clients' requests directly by selecting "Cust. Supp."

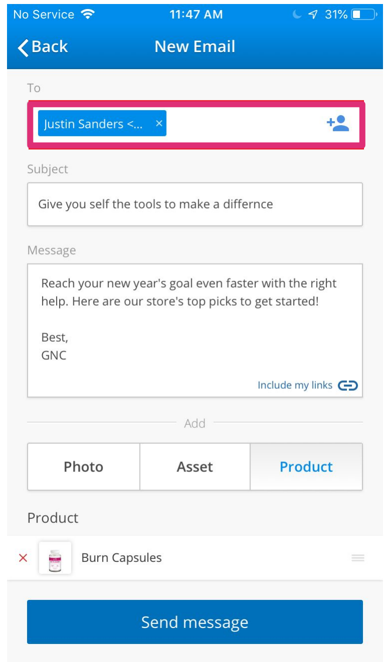


SENDING EMAILS TO YOUR CUSTOMERS

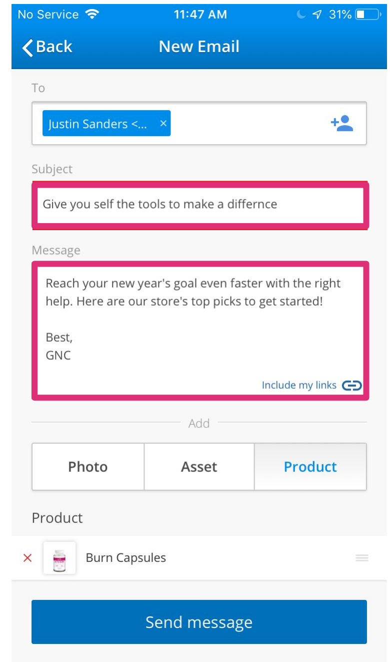
Step 1: To send an email to your customer, choose Compose Email in the actions menu



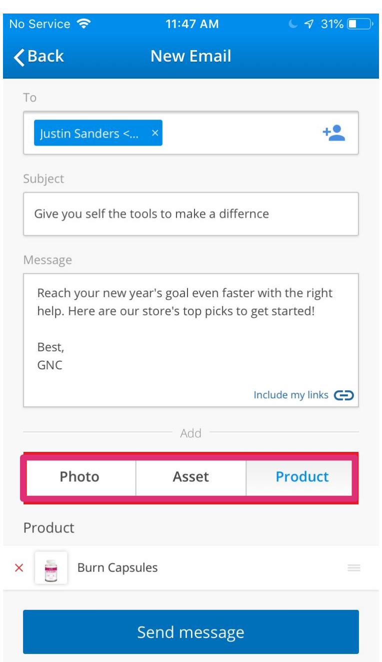
Step 2: Add your client directly in the recipients bar, or use the contact icon to access your existing Salesfloor contacts



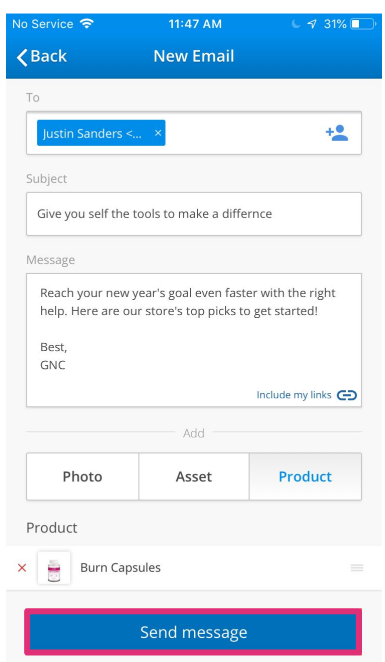
Step 3: Remember to be professional and captivating when entering your subject line and email body



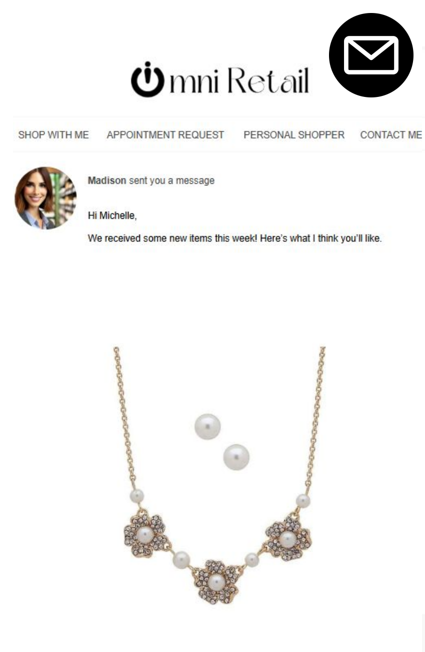
Step 4: Add any photos, assets, or products to help address your clients' needs and bring life to your message



Step 5: Proof-read your response and select Send. Each client that you've included will be treated as a Bcc.



Step 6: Your clients will receive your message in a clean, professional template where they can engage with the content that you attach



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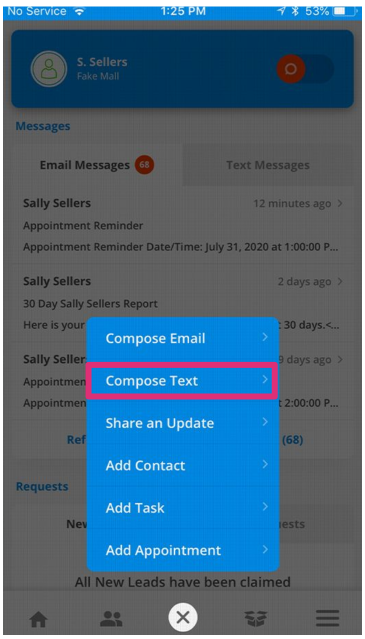
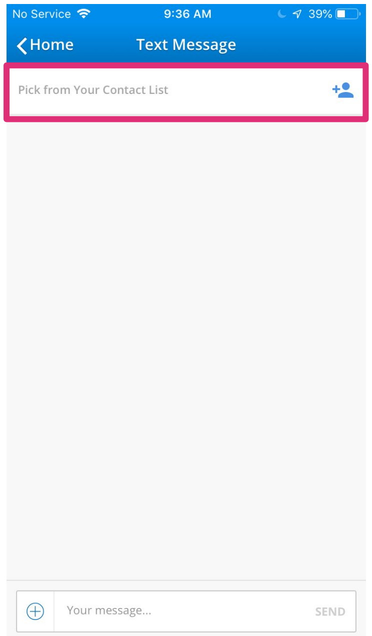
SENDING TEXTS TO CLIENTS

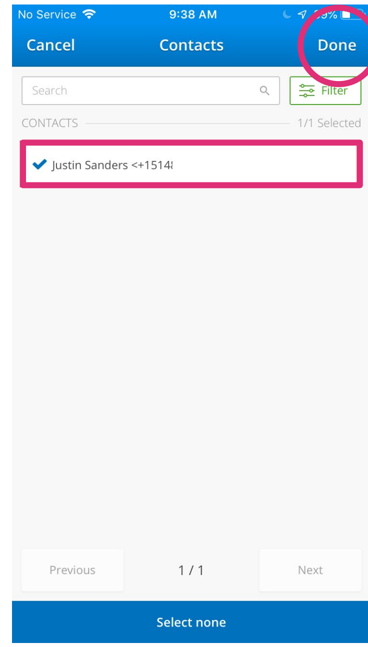
Step 1: To send a text to your customer, choose Compose Text in the actions menu



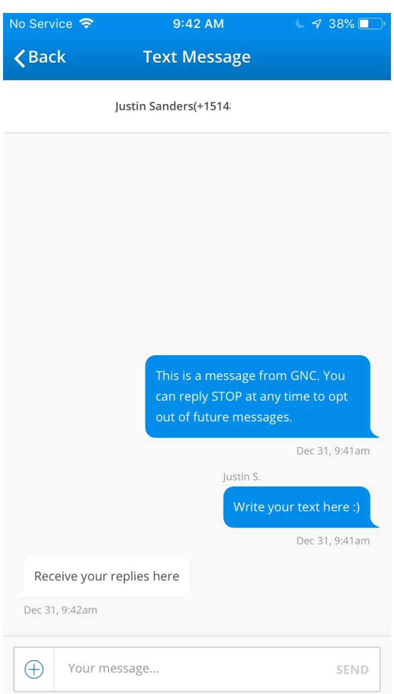
Step 2: Click the recipients bar to select from your contact list



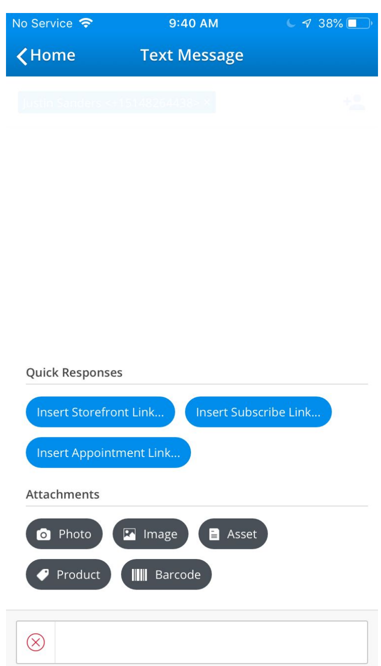
Step 3: Once you've selected your contact(s), click Done to begin texting



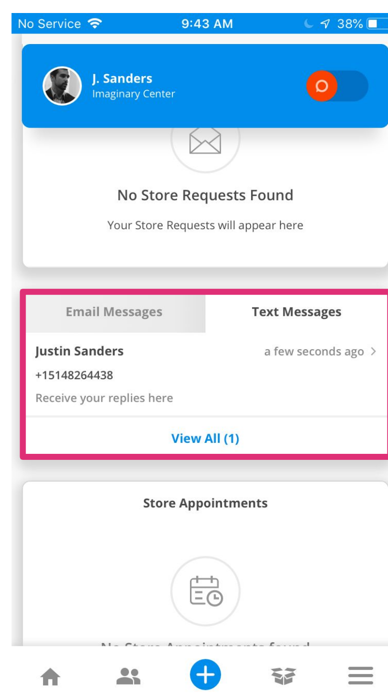
Step 4: Use the text box at the bottom of the page to type your replies, or the + to access attachments



Step 5: In the attachments menu, choose from photos, products, or assets, as well as quick access to key links (e.g. Insert Storefront URL)

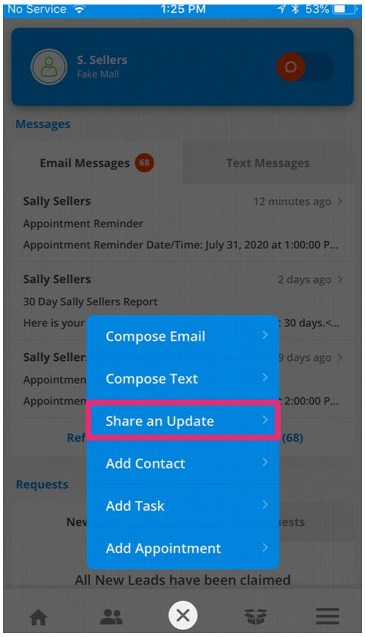


Step 6: Access all of your text conversations at any time from the text component on your app's home screen

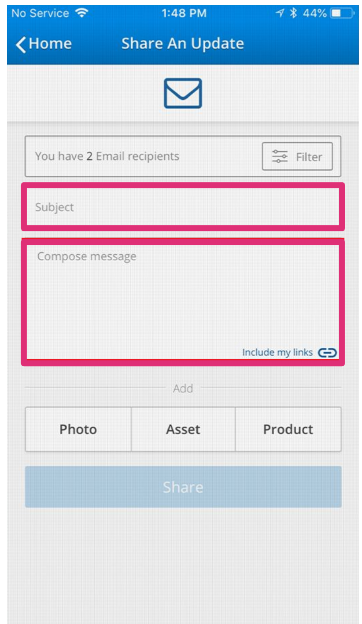


SHARING AN UPDATE WITH CLIENTS

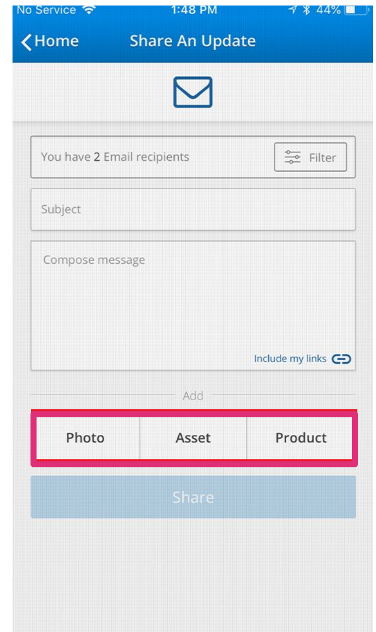
Step 1: To share a new campaign with your clients, select Share on the homepage of your app



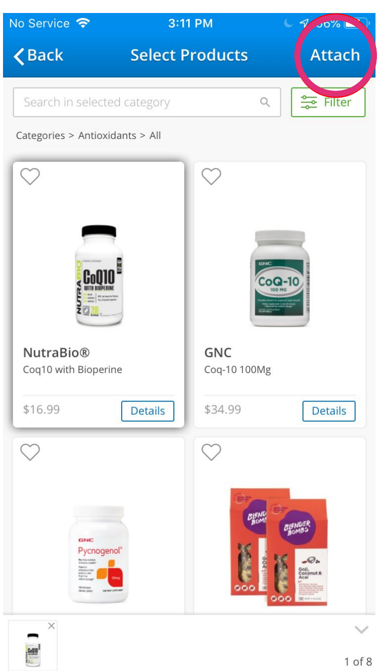
Step 2: Enter your email's subject line, and compose your emails message content



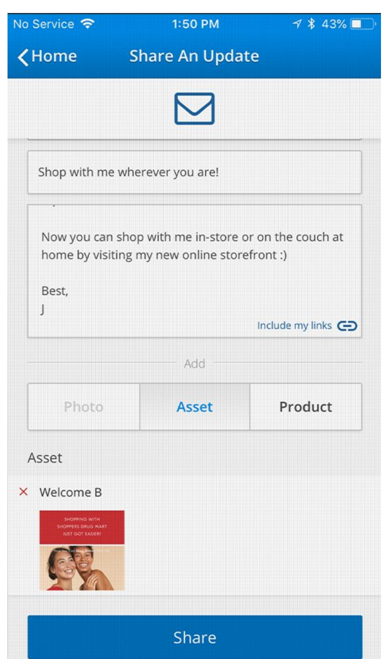
Step 3: Choose the attachment type that you want to add to your message



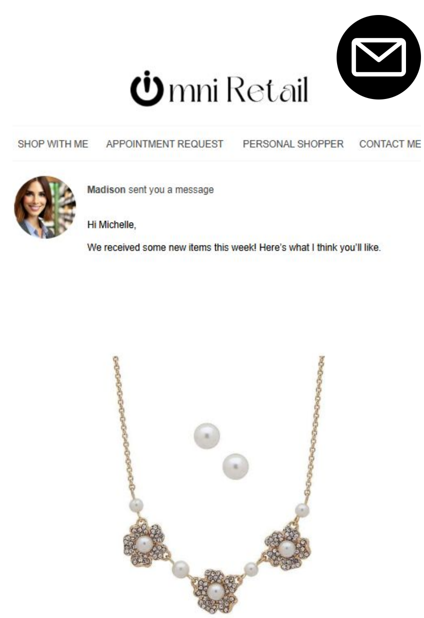
Step 4: Select the attachments you want to add to your email. Select Attach to confirm your selections



Step 5: Review your subject line, message body, and attachments, and when ready, press Share to send your message

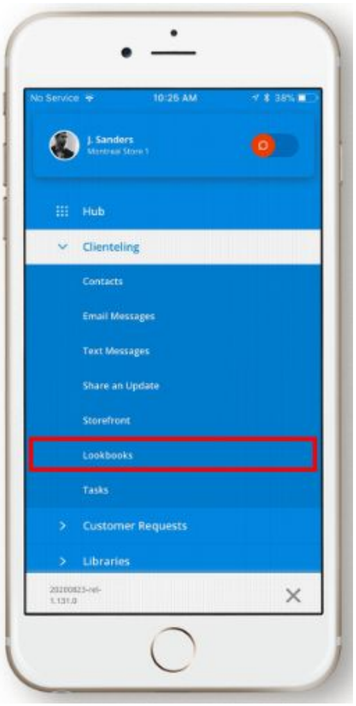


Step 4: Your clients will receive your message in a clean, professional email where they can engage with the content that you attached



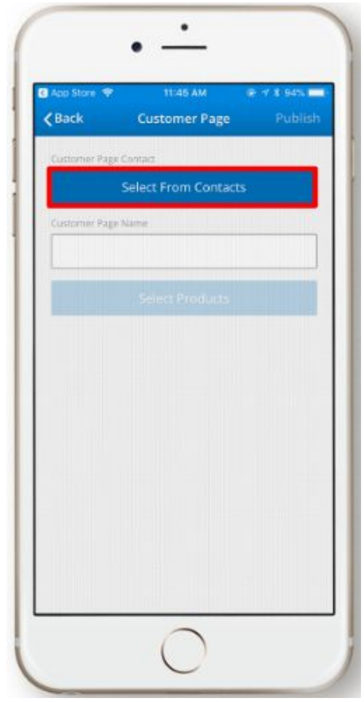
CREATING LOOKBOOKS FOR CLIENTS

Step 1: To review existing, or create a new Lookbook for your clients, select Lookbooks in the side menu

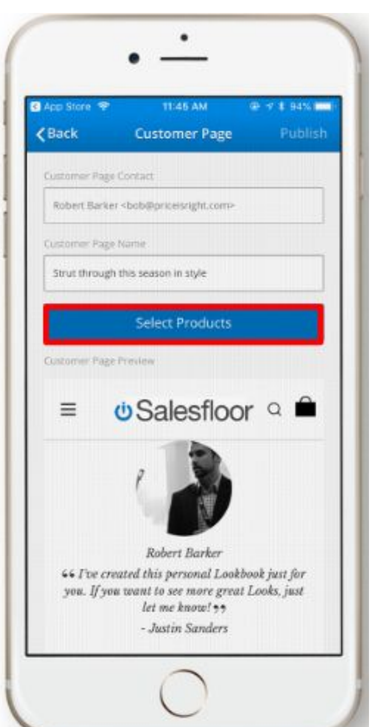


Step 2: To edit an existing Lookbook you can select it in the list, or you can create a new Look by selecting Create Customer Page

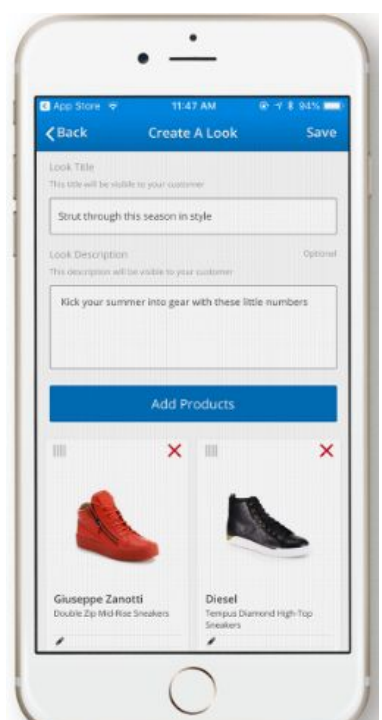
Step 3: When creating a new Lookbook, start by selecting your client (1 per look) and entering the title you want to display in your Lookbooks lists (see step 2)



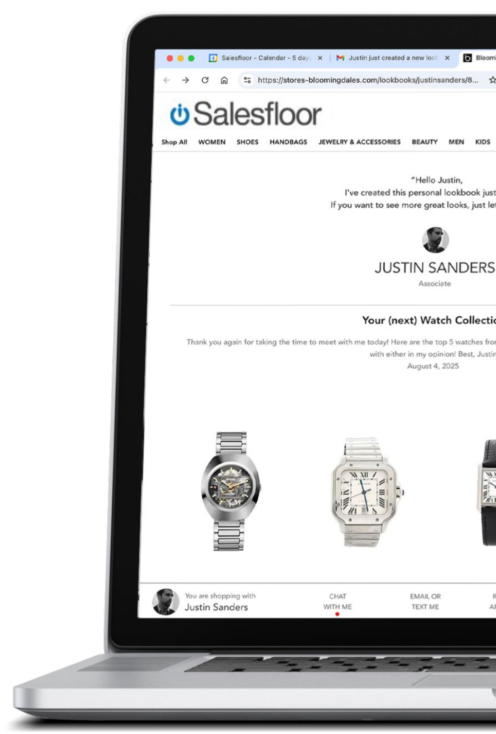
Step 4: Add as many products as you would like to help address your clients' needs and bring life to their personal Lookbook page



Step 5: Add a captivating title and description that will appear on your customers personal lookbook page and Save



Step 6: Once published, your client will then receive an email containing the link to their personal page where they can shop the items you've curated.

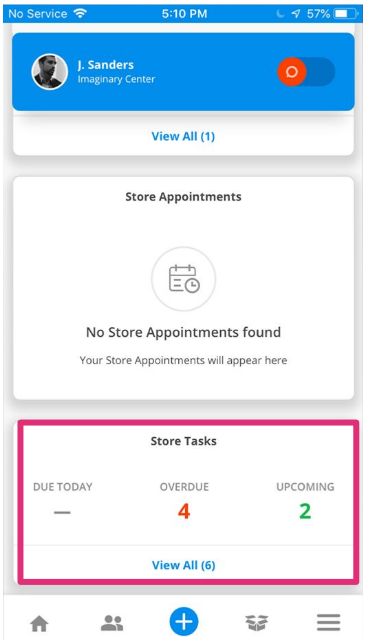


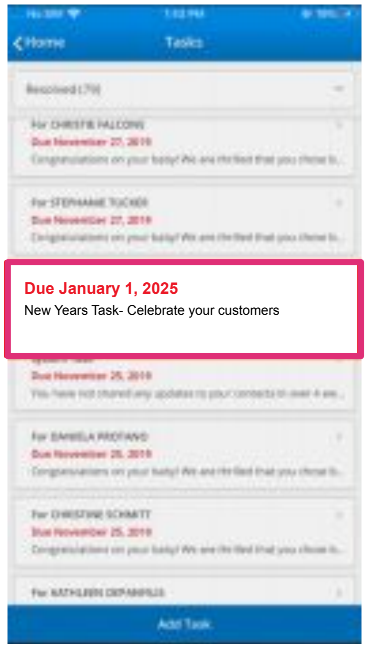
Salesfloor | **COMPLETING CORPORATE TASKS**

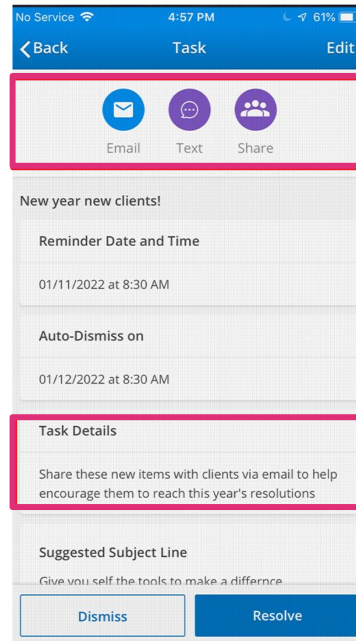
Step 1: Access your tasks by scrolling to the Task component on your app's home screen

Step 2: Select the task you want to execute.

Step 3: Review the task details, suggested copy, and the attachments before selecting your method to share, email, or text the content



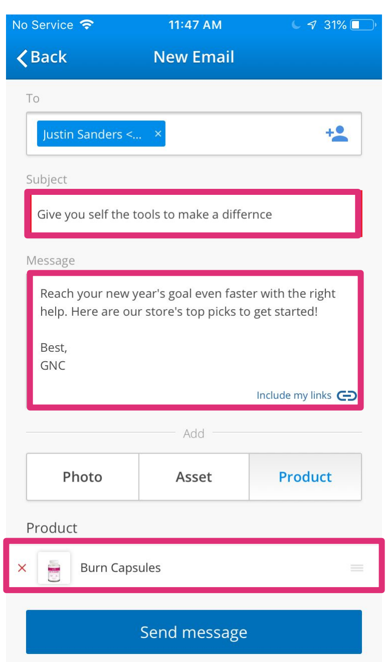


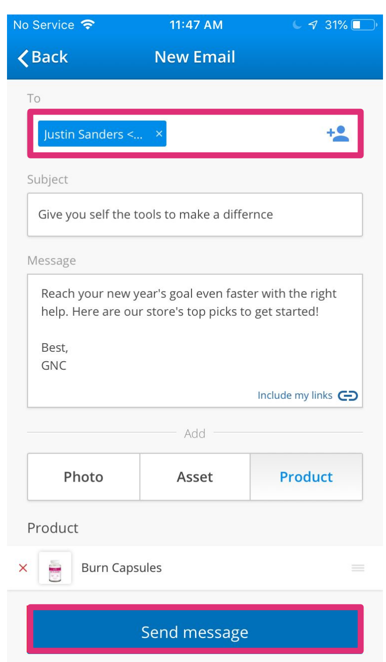


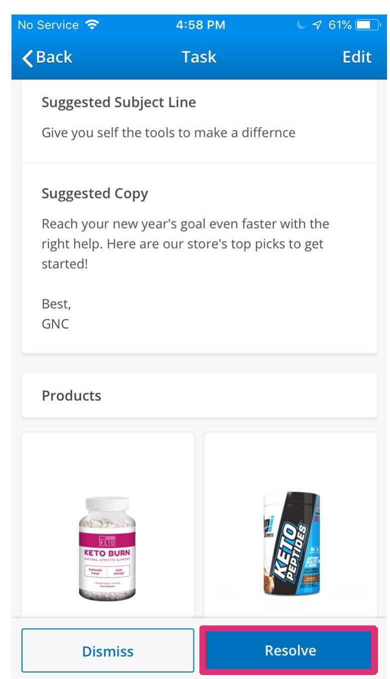
Step 4: The task's text and attachments will pre-populate in the sharing method you choose

Step 5: Choose your recipients & send

Step 6: Return to your task and select Resolve to close the task.







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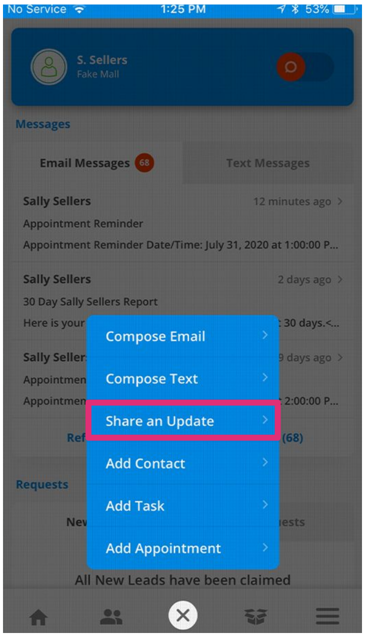
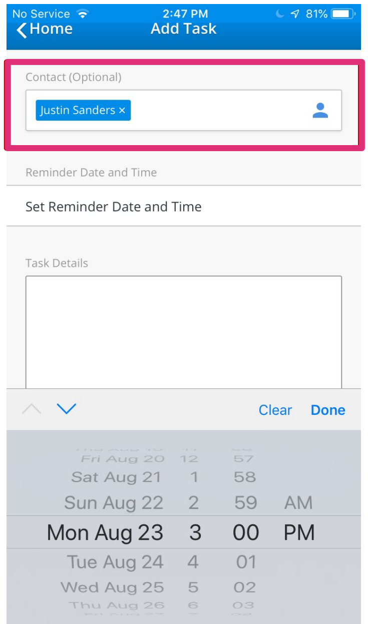
CREATING MANUAL TASKS

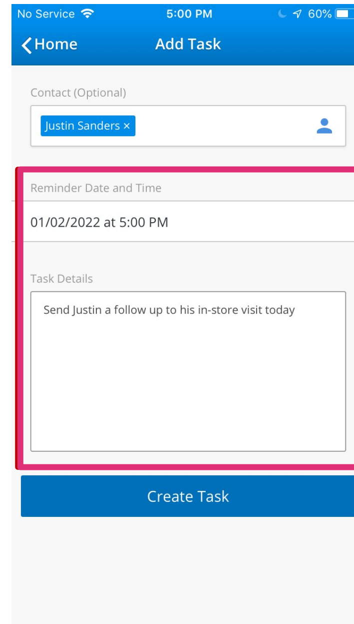
Step 1: From your home page, open the actions menu (**+**) and select "**Add Task**"



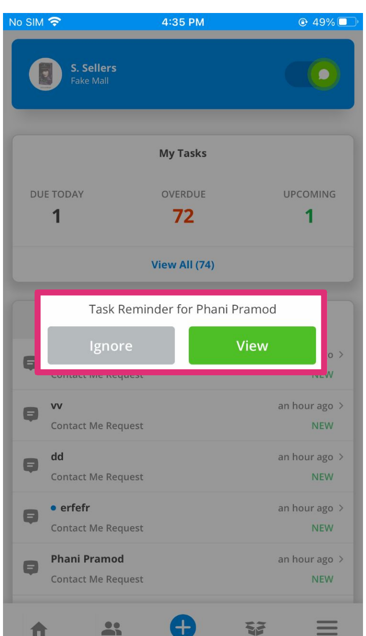
Step 2: You can choose to link a contact if a follow up is needed, or leave the contact field blank if the reminder is personal



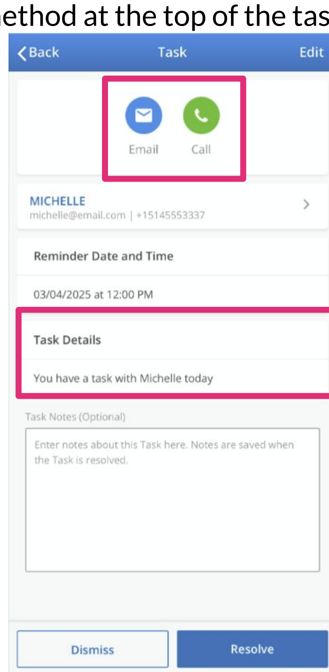
Step 3: Add the **date & time** on which you want to be reminded, and remember to be as descriptive as possible when entering your **Task details** before selecting **Create Task**



Step 4: On the Reminder Date & Time of any task, you will receive a push notification indicating that the task is now due



Step 5: When viewing the tasks, you will see your task details, as well as any linked contacts. If a follow up is needed with the consumer, select your follow up method at the top of the task



Step 6: Once the required action is complete, remember to return to your task & click resolve.