

PORTAL BROKER ENHANCEMENTS

**CLARITY BENEFIT
SOLUTIONS BROKER
ONBOARDING GUIDE**

CLARITY PORTAL **BROKER ENHANCEMENTS**

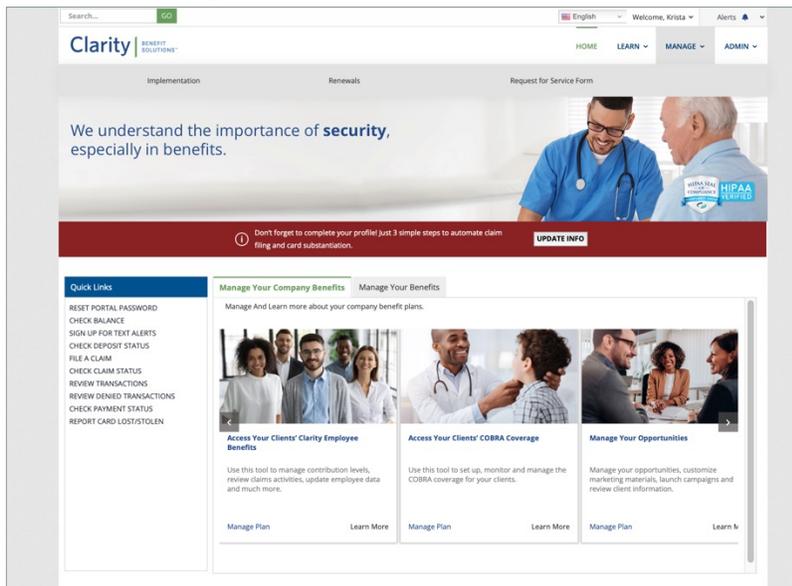
TABLE OF CONTENTS

HOW TO ACCESS YOUR NEW BROKER FEATURES	3
SET UP YOUR PROFILE AND YOUR COMPANY	3
COMPLETE YOUR ORGANIZATION PROFILE	5
HOW TO READ YOUR DASHBOARD.....	7



HOW TO ACCESS YOUR **NEW BROKER FEATURES**

1. Log into Clarity Portal.

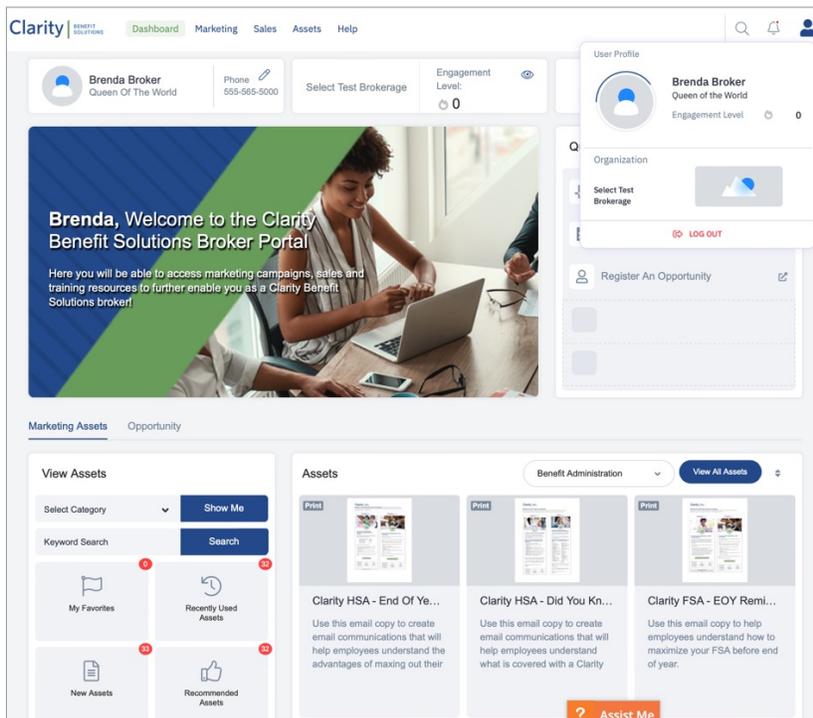


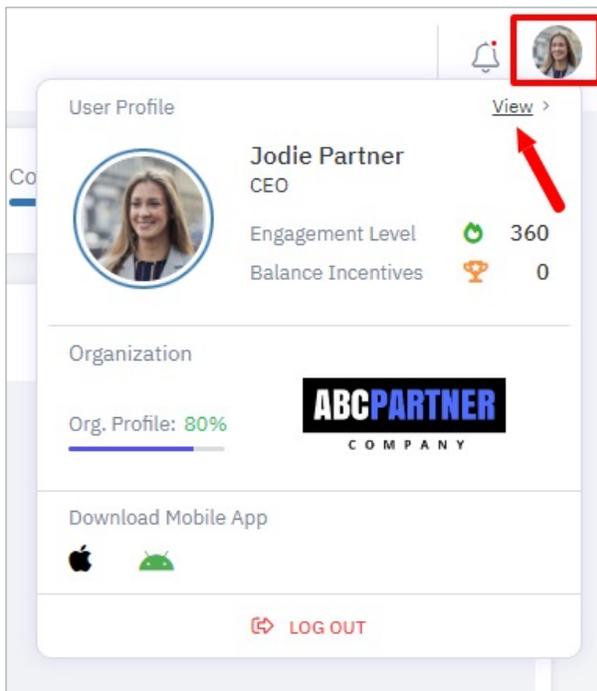
2. Either click on the **Manage your Opportunities** tile or in the **Manage** menu, select one of the following:

- **Enter a New Opportunity**
- **Access Marketing Assets and Campaigns**
- **Review Your Clarity Client List**
- **Review Your Clarity Leads**

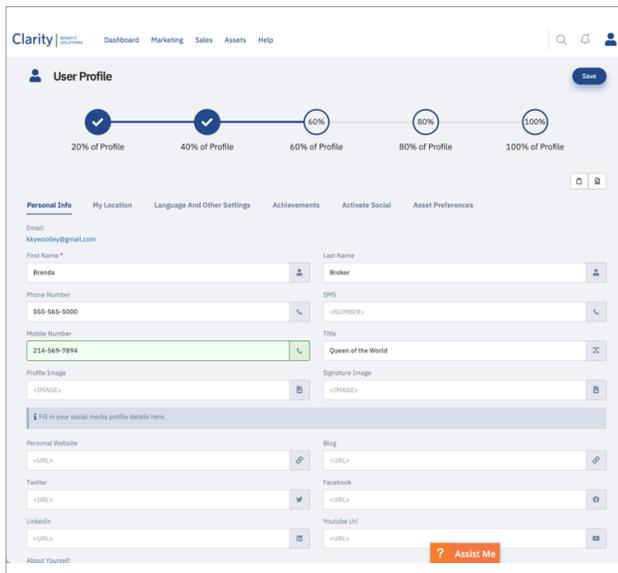
SET UP YOUR **PROFILE** AND YOUR **COMPANY**.

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.

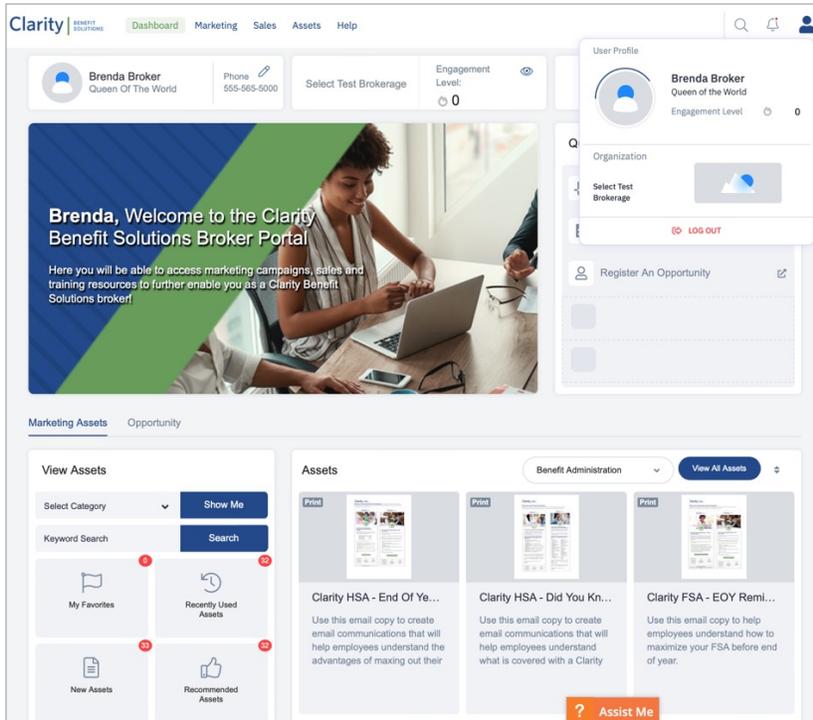
Note: This impacts when your emails are sent out through this email service.

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

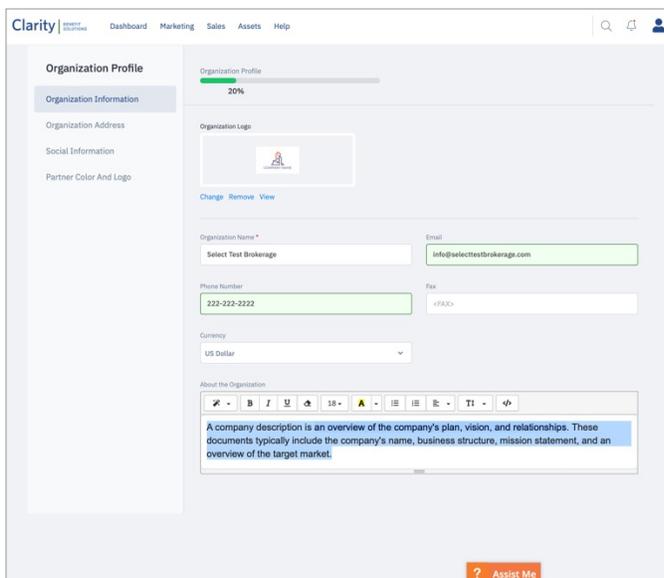
8. Click **Save**.

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.

The screenshot shows the 'Organization Profile' form in the Clarity system. The navigation bar includes 'Clarity', 'Dashboard', 'Marketing', 'Sales', 'Assets', and 'Help'. The left sidebar lists 'Organization Profile', 'Organization Information', 'Organization Address', 'Social Information', and 'Partner Color And Logo'. The main content area shows a progress bar at 20% and several input fields: 'Address 1' (123 Any Street), 'Address 2' (Suite 123), 'City' (Any City), 'State' (Any State), 'ZIP Code' (11111), and 'Country' (United States).

This screenshot focuses on the 'Partner Colors' section of the 'Organization Profile' form. It shows four color selection boxes: 'Color 1' with hex code #35589e, 'Color 2' with #ebca4f, 'Color 3' with #88888d, and 'Color 4' with a white circle. Below this is a 'Partner Logos' section with a plus icon.

The screenshot shows the 'Company Profile' form. The navigation bar includes 'Clarity', 'Dashboard', 'Marketing', 'Sales', 'Assets', 'Reports', 'Setup', and 'Help'. The left sidebar lists 'Company Profile', 'Company Information', 'Company Address', 'Website And Social Information', and 'Company Color'. The main content area shows a 'Company Logo' section with a 'Clarity BENEFIT SOLUTIONS' logo and a 'Save' button. Below this are input fields for 'Company Name' (Clarity Benefit Solutions Sandbox Company), 'Email' (bcrutchfield@claritybenefitsolutions.com), 'Phone Number' (8038627327), and 'Fax' (<FAX>). At the bottom, there are links for 'Document Gallery', 'Image Gallery', and 'Manage Portal', and a 'Assist Me' button.

HOW TO READ YOUR DASHBOARD

The screenshot shows the Clarity Broker Portal dashboard for Brenda Broker. At the top, there is a navigation menu with 'Dashboard', 'Marketing', 'Sales', 'Assets', and 'Help'. The user's profile information is displayed, including the name 'Brenda Broker', title 'Queen Of The World', phone number '555-565-5000', and engagement level '0'. A 'Select Test Brokerage' button is also visible. A large banner image shows three people in a meeting, with the text 'Brenda, Welcome to the Clarity Benefit Solutions Broker Portal' and a sub-header 'Here you will be able to access marketing campaigns, sales and training resources to further enable you as a Clarity Benefit Solutions broker.' To the right, a 'Quick Actions' section lists: 'Send An Email', 'View Assets', 'Register An Opportunity', 'CRM Contact', and 'Sales Contact'. Below the banner, there are sections for 'Marketing Assets' and 'Opportunity'. The 'View Assets' section includes a search bar and filters for 'My Favorites', 'Recently Used Assets', 'New Assets', and 'Recommended Assets'. The 'Assets' section shows a list of assets, including 'Line-Art-House-Roof-And-B...', 'Clarity HSA - End Of Year R...', and 'Clarity HSA - Did You Know?'. At the bottom, there is a 'Lead Engagement' section and an 'Assist Me' button.

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.

The screenshot shows the 'Opportunity' tab in a dashboard. On the left is a summary tile titled 'Opportunities' with a circular gauge showing '1.5K USD #3'. Below the gauge are two bars: a blue bar for '1.5K USD | 3 Live' and a green bar for '0 USD | 0 Closed'. On the right is the 'Opportunity Details' section, which includes a 'Live' filter and a 'Create Records' button. Below this is a table with the following data:

Company Name	Contact Person	Amount (USD)	Created On
Brenda_MM	Broker, Brenda kkywoolley@gmail.com	1,200.00	2/21/2023
MM_testfeb16	Broker, Brenda kkywoolley@gmail.com	100.00	2/16/2023
Test_MM_One	Broker, Brenda kkywoolley@gmail.com	200.00	2/8/2023

Below the table, it says 'Displaying 1 to 3 of 3 from 1 page(s)'.

- 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**.

The screenshot shows the 'Add Record (CBS Opportunity)' form. It has a 'Save' button and a close icon in the top right. The form is divided into two columns of fields:

- Left Column:** Opportunity Name (text), Opportunity Type (dropdown), Stage (dropdown, currently 'Live'), Closed Lost Detail (dropdown), Expected Close Date (text with asterisk).
- Right Column:** Account Name (text), Product (dropdown), Stage Detail (dropdown), Amount (text with 'USD' dropdown), Description (text area).

- 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.

