

# Snug Match - Onboarding Guide

<b>// Welcome</b>	<b>2</b>
<b>// Join Snug</b>	<b>2</b>
<b>// Overview</b>	<b>3</b>
<b>// Messages</b>	<b>4</b>
<b>// Viewings</b>	<b>5</b>
<b>// Applications</b>	<b>6</b>
<b>// Applications Details</b>	<b>7</b>
<b>// Applications Progress</b>	<b>8</b>



## // Welcome

Welcome to Snug!

Here's a brief guide to get you started.

We recommend a three step process for smooth transition to Snug.

**Step 1.** Get your team set up

**Step 2.** Use Snug for applications

**Step 3.** Turn on viewings

For more information:

- Visit <https://help.snug.com/> for support articles
- Email [hello@snug.com](mailto:hello@snug.com) and the Snug team will be happy to help

## // Join Snug

### Summary

The Snug team will set up your Admin and invite team members.

### How it works

- Each team member will receive an email with an invite to join Snug
- Click the button [Invitation] to register your account and join your team on Snug
- The Authorised Administrator from your team can remove/add new team members through our customers service team [hello@snug.com](mailto:hello@snug.com)

## // Overview

### Summary

The Overview page is your home page on Snug. It shows you the progress of properties for lease.

### How it works

- Your properties are automatically fed to the Snug platform
- You can immediately see a snapshot of the progress of the property
  - Properties (44) - shows number of live properties
  - Days on market - coloured font shows priority:
    - Red - high priority listing, past the First Available date, vacancy is costly!
    - Orange - within 14 days of First Available date, time to get this property let
    - Black - more than 14 days to First Available date
  - Messages - enquiries received on the property
  - Viewings - number attendees for viewings
  - EOI - expressions of interest are pre-applications
  - Applications - number of applications submitted
- Search by property address
- Filter by team member
- Click [View] to see all the applications received!
- Green dot shows 'new' activity in the last 24 hours

### System settings

- Property feeds run via temporary webfeed or uploader (e.g. MyDesktop)
- Property list includes properties added manually on the platform

### Tips to get the most from this feature:

- Click (...) to access additional features eg. Archive to clear the list
- Click the [number] in the columns to see the underlying details eg. viewings 13
- Ensure you're on "My Team" in top navigation, especially on Phone (top left > three bars > My Team)

## // Messages

### Summary

Messages is your rental enquiry inbox. It consolidates messages from portals, your website and any other source that you wish to point to this inbox.

### How it works

- When messages are set up you enquiries will be delivered to the Snug platform.
- Renters will receive an auto-reply with the top questions answered eg. when is it available, can I inspect, is there parking, are pets permitted etc...
- Enquirers will be notified with alerts:
  - New properties matching their criteria
  - New or updated viewing times
  - Unsubscribe link to stop notifications

### System settings

- The Snug team will set up your unique message box email eg. [11L481example@mail.snug.com](mailto:11L481example@mail.snug.com)

### Tips to get the most from this feature:

- Filter messages (property or manager)
- Search for messages for a particular property or filter by property manager or view all
- Click [Archive] to archive messages that are old or unwanted and clean your inbox
- Click the Email and Phone number shortcut links to start an email or call
- Messages received by Snug can also be forwarded to a mailbox of your choice

## // Viewings

### Summary

Viewings are scheduled times for Renters to inspect a property for lease.

### How it works

- Viewing times can be added:
  - Automatically from your property feed
  - Manually from the dashboard
  - The viewing can be managed on the platform (edit, delete)
- Renters can pre-register and be checked in or added as a walk-in (Snug SMSs a walk in and collects the email from the Renter automatically)
- [Late] - sends a template SMS to all registered viewers: 'running late' 5,10,15,30 min
- [Request feedback] - is sent on the hour after the viewing time automatically
- Report - shows a PDF report of the Feedback from viewing attendees
- Summary shows the registered, interested and checked in

### System settings

- Applications shows the date/time when the tenant viewed the property and additionally Renters confirm they accept the property condition when submitting their application
- Older schedules can be shown by "Show older"

### Tips to get the most from this feature:

- Click [Invite to apply] to send an email and SMS to all who checked-in (with an email or mobile) with a link to start their application

## // Applications

### Summary

Rental applications must meet a minimum standard of information and are grouped by household so you receive a summary view of your prospects sorted.

### How it works

- Application summary shows the applications grouped by households with:
  - Snug Match Score
  - Date/time received
  - Rent and Term offered
  - Ratio - shows affordability of rent to after tax income
  - Households - people and pets
  - Status - Applied, In progress (draft), Declined
- Key buttons:
  - Shortlist - sends a friendly email to keep the Renter warm
  - Decline - emails the Renter and remarkets your property list
  - Progress - to mark as leased or send template emails (holding deposit/bond)
  - Envelope - share the application:
    - De-identified with the owner
    - With your colleague
- Quick links - easily navigate to the Viewings, Messages and Applications for a property
- Household applications:
  - Primary applicant invites the joint applicants, once the primary person submits their application

### System settings

- Renters can withdraw their application - can not be viewed by the property manager

### Tips to get the most from this feature

- Set up your templates
- [Mark as leased] to close the property on the Snug Platform (cease notifications to interested parties and send the utility connection)

## // Applications Details

### Summary

Snug gathers and collates application details for a household on one page. Property managers have the tools to request more information, see verified information and take action to decline or progress a Renter.

### How it works

- Application summary shows the applications grouped by households with:
  - Summary of the offer from the primary applicant / household
  - Rental references - verifies the rent, tenure and arrangement
- Key buttons:
  - [Download application] - enables a PDF download with the application details
  - [Request info] - sends the Renter a deep link email to upload the information that you require on their profile
  - Optimise Match Score - enables a PM to recalculate the score by setting the owner objective to maximise the rent, occupancy and condition
  - Blue boxes - attached documents which are viewable eg. Rental Ledger
  - [Resend rental reference] - enables a PM to update a reference email and resend
  - [Progress] - enables a PM to review the lease offer details and progress the application to the last stage: Mark as Leased and/or send utility connection.

### System settings

- Renters can withdraw their application - can not be viewed by the property manager
- Renter application status shows Applied or Invited (by the Primary applicant)
- Checked-in and viewed the property

### Tips to get the most from this feature

- Easily switch between the details of the household applicants to see their details
- Household income is a calculation of the total net weekly after tax income declared by all applicants
- Shortlist to send a friendly email to keep the Renter warm
- Scan the application for verified labels and green ticks for information that has been checked with the nominated contacts. Red or yellow requires a conversation with the Renter
- Individual disclosure consent are attached at the bottom of each applicant

## // Applications Progress

### Summary

Progress application enables the property be 'Marked as Leased' and template emails (bond/holding deposit) to be sent to the Renter.

### How it works

- Application summary shows the applications grouped by households with:
  - Summary of the offer from the primary applicant / household
  - Rental references - verifies the rent, tenure and arrangement
- Key buttons:
  - Progress - enables a PM to review the lease offer details and progress the application to the last stage: Mark as Leased and/or send instruction emails
  - Marked as Leased - closes the property on the platform and issues utility connection referral (if configured with your connections partner, under a paid subscription plan).
  - Send - option to send template emails eg. Holding Deposit and Bonds

### System settings

- Property managers can upload their email templates by contacting [hello@snug.com](mailto:hello@snug.com)
  - Holding Deposit instructions
  - Bond instructions