



APTO SUPPORT PLEDGE

At Apto, our goal is to make you a more successful commercial real estate broker by helping you understand how to put our products to work for you. Regardless of the size of your account, we are committed to showing you the path to maximize the value you get from Apto.

As personable and knowledgeable as our support team is, we know that the best customer service is the one that you don't need because you understand the product you purchased and know how to get the most from it.

Being taught the basics of Apto from initial signup will provide you a return on your investment far sooner and will save you time in the long run. To that end, we have created several different paths for you to follow based upon how you learn best.

Accessing Instructional Content

For new users looking for a self-paced auditory onboarding experience, we invite you to work through [several quick video sessions](#).

If you're the type who requires more of a human touch, we have you covered with regular webinars on the topics brokers care about most. How to prospect better, how to market new listings, etc.

For existing users who learn by reading, we have a deep trove of information detailing the answers to most questions you may have. You may access the information center [here](#). Many articles also have accompanying videos in order to show you how to accomplish your goal. With clear voice-overs and click by click instructions, you won't get lost along the way.

What Apto Supports

Apto has a number of different channels by which you can find the answer you need. We have a massive knowledge library that includes articles and videos in addition to live and recorded webinar content.

Please feel free to [submit a support ticket](#) any time you can't find the resources you need. In order to get you an answer even quicker, we will often ask that you submit a short questionnaire in addition that will help us understand both your account and your needs.

Our support team is here to help you by:

- Fielding bug requests, ensuring the Apto product team understands the issue, and communicating updates back to you in a timely manner



- Explaining product features by pointing you in the right direction within our knowledge libraries or registering you for a webinar series
- Providing strategies to troubleshoot account issues
- Investigating issues with reports

Apto will also provide reasonable, lightweight configuration (i.e. <30-minutes of effort) in order to help suit the product's existing functionality to your needs. This is done free of charge outside of our normal lines of support and, as such, we can not guarantee a turnaround time that complies with our SLA.

Apto no longer provides development services to configure your account (more on the distinction between configurations and customizations below). As such, any prior work Apto has provided to configure your work should be deemed **as-is**. Future performance guarantees can not be made, nor does Apto guarantee we have the resources to fix issues that arise from the work you requested. Configurations may break with future product releases and, therefore, it's strongly recommended that you find workflows that work within the confines of the product.. Apto does not employ Salesforce developers who work at an account level basis.

Configuration vs. Customization

A configuration is a tweak to existing Apto functionality. This may be something like adding a field for a property or customer that you'd like to track.

A customization is a new piece of functionality that does not come with Apto out of the box. An example would be an automated workflow such that when a certain action is taken a subsequent action is automatically triggered.

Apto supports additional lightweight configurations, *but not customizations*. Configurations may include:

- Adding a field
- Creating new picklist items
- Custom objects (less than 30 minutes of work)
- Custom record types (less than 30 minutes of work)

Customizing Apto

Every broker has their own special sauce that makes them successful. While the Apto product can be configured, we can not always support every ingredient of that special sauce. Sometimes, your process may not be 100% represented in the Apto product on a click-by-click basis.



As Apto no longer employs a Professional Services Development group, we recommend looking at third-party Salesforce developers to build and maintain custom workflows.

DISCLAIMER

You may customize the Apto product via third parties, but doing so may limit or prevent your version of the Apto product from receiving future upgrades. Further, changes Apto makes to its product may break the customizations you've built and remedying those customizations is warranted and governed by the relationship between you and the third party.

Apto does not support:

- Adjusting a page layout
- Workflow, process builders, and email triggers
- Custom objects or record types (greater than 30 minutes of work)
- Third-party applications
- Custom integrations
- Custom development (new configuration, process automation, development, etc.)
- Lightning enablements

Data Migration

Apto prides itself on transforming your data into a usable format that allows you to make the most of your Apto experience.

Upon completion of a short questionnaire, our data support team will take an unaltered single source of data, clean it and import it into your new Apto instance. More complex data sets (e.g. multiple sources, custom fields, etc.) take an exponential amount of time to clean and import. For example, two sources take nearly four times longer than a single source to clean and import. As such, these cases will incur an additional charge to cover the cost of our team.

Our Apto data team does not support:

- Self import data tools
- De-duplications
- Data administration
- Mass deletion of data
- Data exports

