

Updater is an email invitation platform that is branded for you and your company and personalized for every client. It works quietly in the background so there's not much you need to do to make it work!

If your company is integrated with Updater, they will automatically share basic client information with us, so you don't have to lift a finger. If you're a real estate professional with an individual Updater account, sending your clients invites from your professional dashboard is a breeze!

## WHAT INFORMATION IS REQUIRED?

In order for your clients to successfully receive their unique Updater invite link, we need the following information:

1. First and last name
2. Email address
3. Estimated move date
4. Address(es) they are moving to and/or from

## IS MY CLIENT'S INFORMATION SAFE WITHIN UPDATER?

Absolutely! We take your clients' [privacy](#) very seriously, so all of their information is secure within our system. We also never collect highly sensitive information from your clients.

## WHEN WILL CLIENTS RECEIVE THEIR INVITES?

Updater invitations should be sent about 3 to 4 weeks prior to your clients' move or close dates, that way they can get a head start on all of their moving tasks.

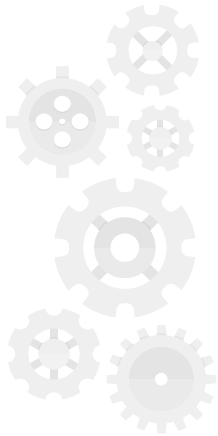
## WHAT IF MY CLIENT IS MISSING AN INVITE?

If your company is integrated with Updater and your client is not appearing on your professional dashboard, or if their invite was not sent, we may be missing some information. The best solution here is to send a manual invite from your professional account, but feel free to get in touch with us at [success@updater.com](mailto:success@updater.com) if something else went wrong.

## WHAT IF I NEED TO MAKE CHANGES OR CANCEL AN INVITE?

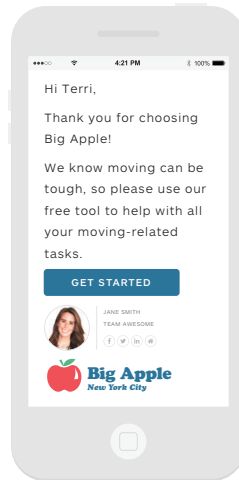
No problem! If your company is integrated with Updater, we'll always notify you via email 48 hours before a client is invited, so you're never caught off guard. You can cancel or edit any information directly from that notification. Otherwise, any professional can log into their account and select "cancel" or "edit" in the action column of their dashboard.

### INTEGRATE



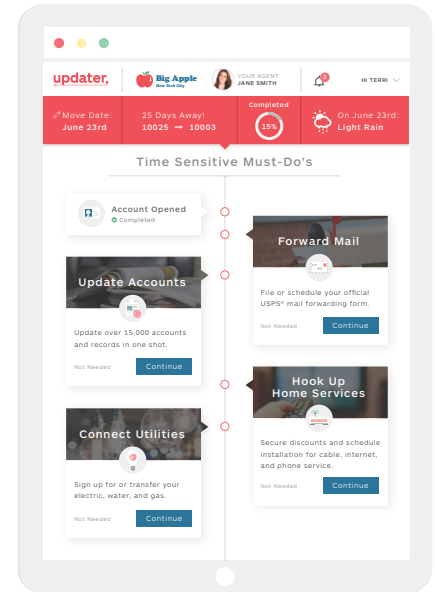
We integrate with your transaction management software to pull client information.

### INVITE



Invitations sent when we receive your clients' info – you don't need to do a thing!

### ORGANIZE YOUR MOVE



Every client has an experience customized to fit their unique move.

## IS THERE ANYTHING ELSE I SHOULD DO?

Talk to your clients about Updater – it's that simple! Advise them to keep an eye on their inbox for their very own Updater invite. It's the best way to make sure they take full advantage of the concierge service you're offering them.