

## CLOZE FREQUENTLY ASKED QUESTIONS (FAQ)

### General Questions

- 1. What is Cloze?**

Cloze is a desktop and mobile app to track customers, clients, prospects, and leads without the hassle of other CRMs. Cloze is a relationship management tool that brings together your inbox, contacts and interactions into one platform.
- 2. What is a CRM?**

CRM stands for Customer Relationship Management. Cloze is a CRM which provides a technological tool to seamlessly manage all of your relationships and interactions with your clients. A CRM allows you to improve your business by helping you stay in touch with relevant clients in a timely manner and taking out the guess work of who to contact when.
- 3. How much does Cloze cost?**

LIV brokers have a special discounted rate of \$35 per month (when signing on for a year). The regular rate outside of LIV is \$50 per month.
- 4. How long is the free trial?**

The free trial to test Cloze is now through March 31<sup>st</sup>.
- 5. How do I sign up for Cloze?**

Please visit the [Source](#) to sign up for Cloze, to view the Account Creation Instructions and to watch “How To” videos (Resources – Cloze Sign Up).  
*After you have signed up you will receive a CLOZE invitation within 48 hours. You must accept the invitation to continue your account registration.*
- 6. Which Cloze option is LIV offering?**

Sotheby's International Realty has partnered with Cloze for the Cloze Platinum Plan because it includes DASH integration, MLS integration, Matching Engine, and Ninja management practices. This plan is provided to you at a discounted rate of \$35 per month.
- 7. What is Cloze Pro?**

Cloze Pro is for solo users and does not include any of the real estate specific features that the Cloze Platinum Plan does.
- 8. Should my assistant or partner have a CLOZE account as well?**

Your account can be setup with a sub-team. Please see your Office Administrator or Marketing Lead for your specific needs.

### Questions Regarding Transitioning Contacts

- 9. Will bounce back emails in Rezora be transferred over to Cloze?**

Yes, bounce back emails will be transferred to Cloze from Rezora. Cloze is not screening for bounce backs as it can be a variety of reasons why emails bounce (one character is off, etc.).

10. Will unsubscribed contacts in Rezora be transferred over to Cloze?  
No, unsubscribed emails will not pull over into Cloze. Please see your Office Administrator or Marketing Lead for instructions for how to manually download your unsubscribed list from Rezora.
11. What does the social media sync into Cloze capture?  
Because of changes to the social media landscape over the last several years, a majority of the social activity in Cloze is from Twitter. Both Facebook and LinkedIn changed their integration policies in 2015 to greatly limit what all app developers can access in either platform. Twitter has generally kept its developer program the same so you will see Tweets from the people you follow and Twitter messages.  
**For each social network, Cloze supports:**  
Twitter: See any timeline, your direct messages and people you follow. Post Tweets.  
Facebook: See and post to any Facebook Pages you administer.  
LinkedIn: See and post to any LinkedIn company page you administer.
12. For using ActivePipe, how do I tag my contacts in Cloze to receive Autosends?  
These contacts **must** be tagged #primary-sphere.

### For Those with Another CRM

13. How can I transfer contacts from another CRM directly into Cloze?  
This depends on which CRM, please contact your Office Administrator or Marketing Lead for further information.
14. If contacts are tagged in another CRM, can these tags be transferred into Cloze or do I re-tag all of the synced contacts in Cloze?  
This depends on which CRM, please contact your Office Administrator or Marketing Lead for further information.
15. Can I import other data sources?  
Yes, most spreadsheets or data in a CSV (Comma Separated Value) can be imported but require specific formatting to ensure proper importing.  
*Note: Cloze supports importing of Contactually without needing to reformat any data.*

### Integrations & Customizations

16. Can I customize segments in CLOZE?  
Only personal segments can be customized. Business segments are restricted to real estate and Ninja configuration.
17. How do I separate my contacts into groups?  
A contact can have multiple tags to allow you to sort and group your contacts in multiple ways. Tagging is the best way to identify your contacts based on your personal preferences.
18. Why do I need to connect my phone and email?  
Cloze will help remind you to maintain productive relationships with your top contacts. Cloze will advise you when you haven't reached out to a contact in a while.

19. Does Cloze record my phone conversations or track my personal information.

No, Cloze will log your phone and email interactions and allow you to view what is already in your email.

### **Cancelling Your Cloze Account**

20. How do I cancel my Cloze account?

If you would like to cancel your Cloze account before the free trial ends, please email your written notice to [it@livsothebysrealty.com](mailto:it@livsothebysrealty.com) the week of March 23<sup>rd</sup>. **If you choose to cancel, your trial account will not be shut off until March 31<sup>st</sup>.**

21. What happens when I cancel my Cloze account?

If you choose to cancel your Cloze account after the free trial, all contacts will be deleted.

### **Learning More**

22. How do I get more information about Cloze?

Join your future sales meetings as Cloze will continue to be introduced or you can visit [help.cloze.com](http://help.cloze.com) for informational videos, FAQ's, articles and more.