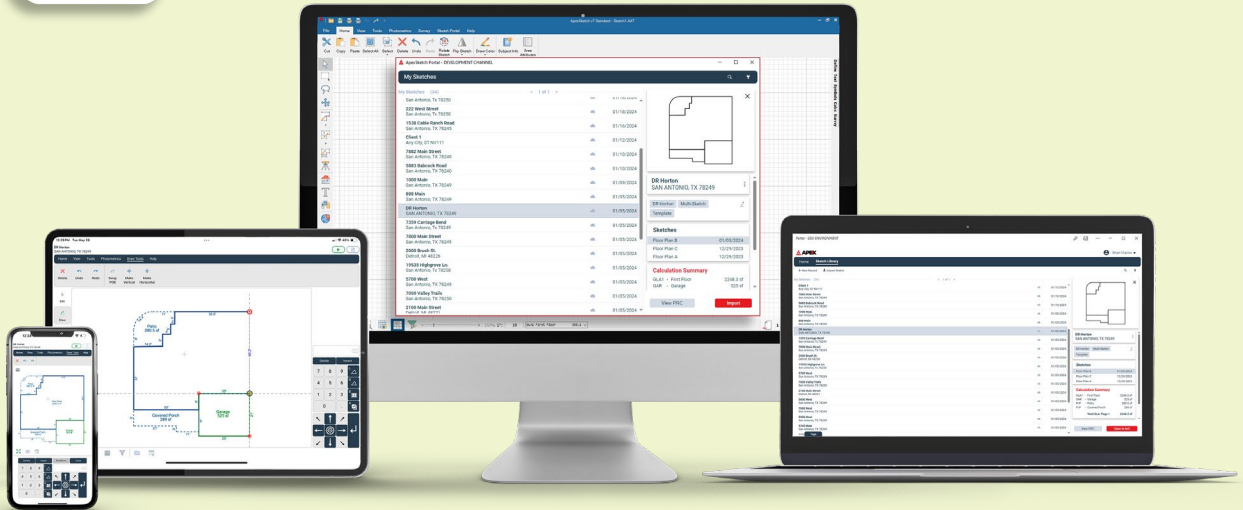# ApexSketch Portal

The following QuickStart Guide will walk you through getting started using the ApexSketch Portal™. If you do not have an ApexSketch Portal™ account, give us a call at 1-800-858-9958 and we can help you get set up.

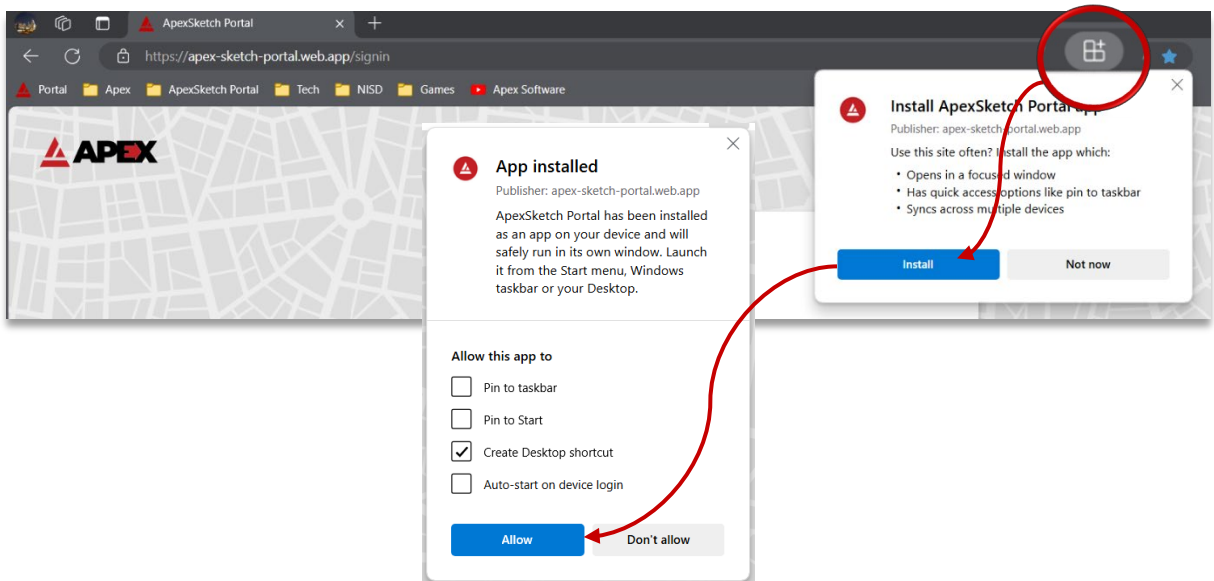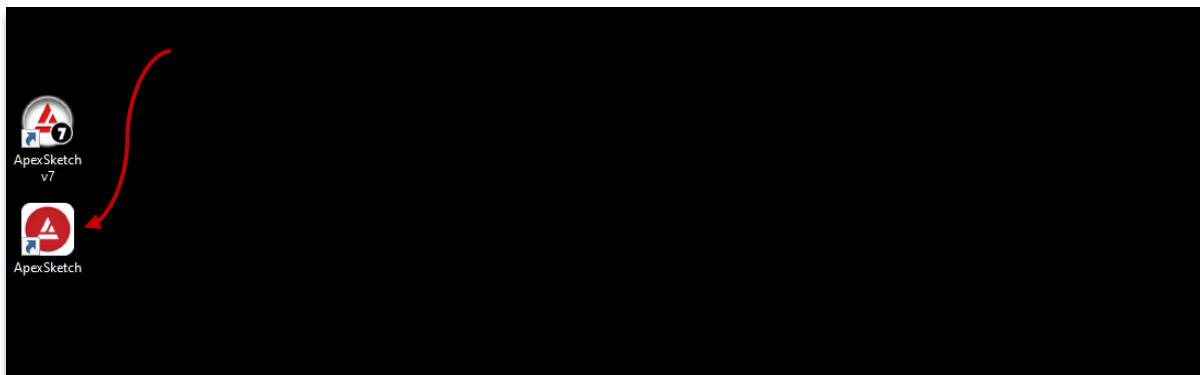# Step 1 – Install ApexSketch Portal™ on your device(s)

The first step in getting started using the ApexSketch Portal™ is to install on both your desktop / laptop and your mobile device. Below are steps on installation.

Windows - Desktop / Laptop / Tablet

1. On your desktop / laptop go to https://portal.apexwin.com using Google Chrome or Edge.

2. Once the page loads click on the "install" icon on the right side of the address bar. When prompted to "install app?", click on the **Install** button.
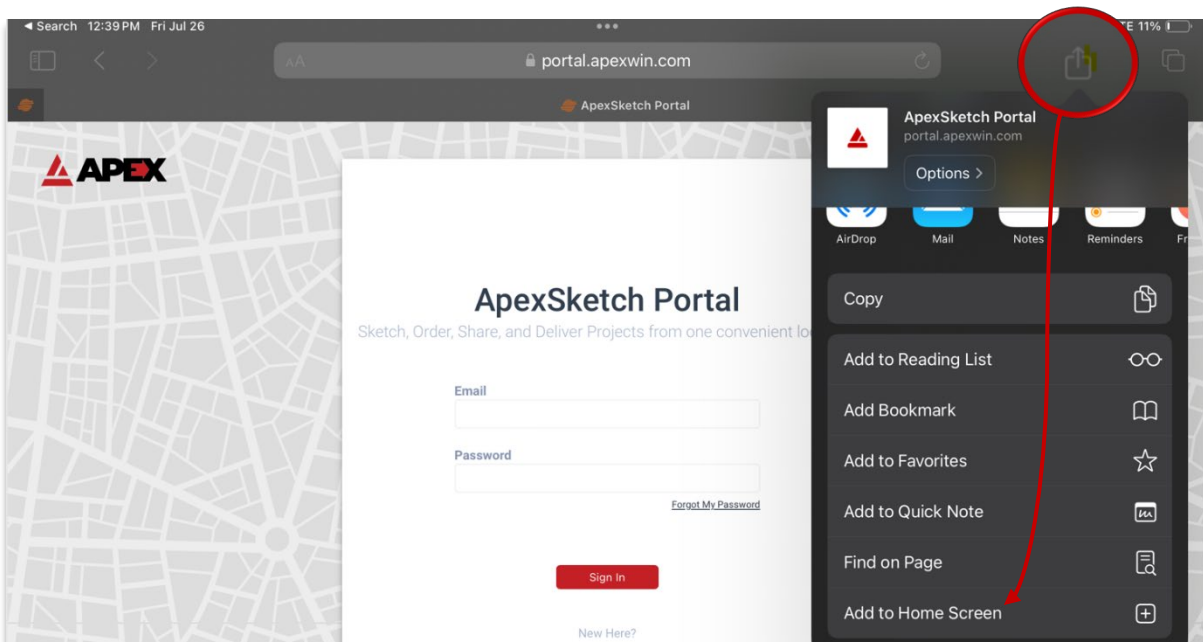

3. Once installed, an ApexSketch Portal™ icon will be added to your desktop.
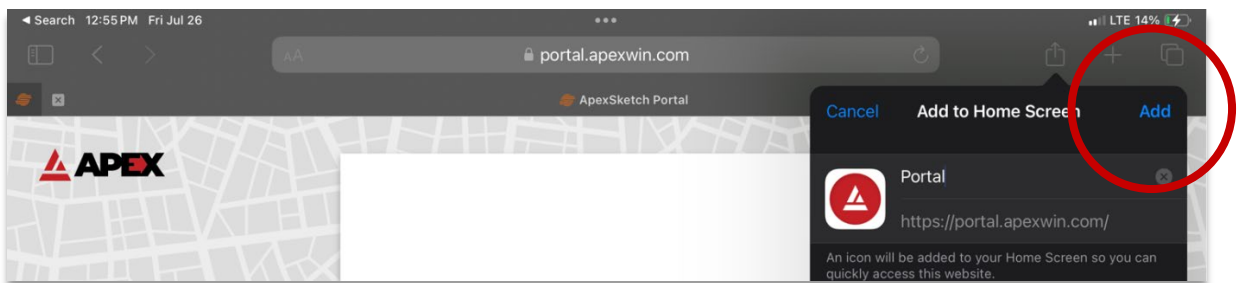
Step 1 – Install ApexSketch Portal™ on your device(s)

iOS - iPad / iPhone

1. On your iPad / iPhone go to https://portal.apexwin.com using Safari.

2. Once the page loads tap on the "share" option on the right side of the address bar and select **Add to Home Screen**.

3. On the next screen, tap the **Add** button to add an ApexSketch Portal™ icon to your devices home screen.
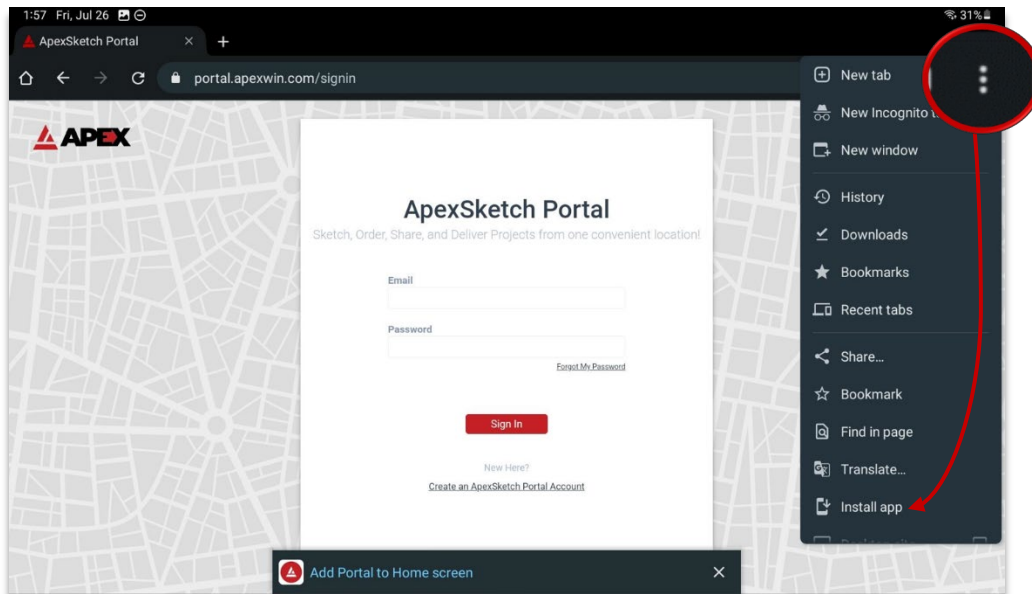
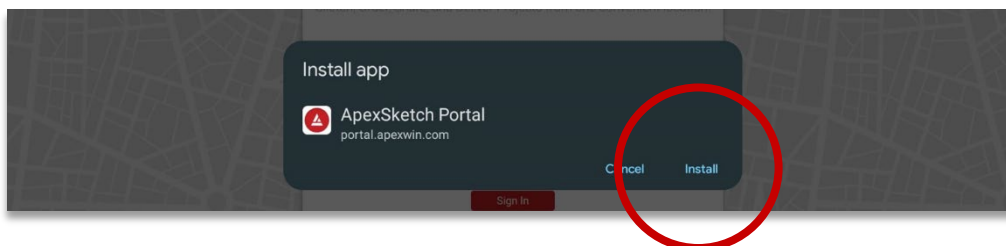# Step 1 – Install ApexSketch Portal™ on your device(s)

Android - Tablet / Phone

1. On your Tablet / Phone go to https://portal.apexwin.com using Google Chrome.

2. Once the page loads tap on the "menu" button on the right side of the address bar and select **Install app**.

   *Note: If presented with a "**Add Portal to Home screen**" prompt, you can tap on that to install as well.*

3. On the next screen, tap the **Install** button to add an ApexSketch Portal™ icon to your devices home screen.

Step 2 – Sign In

Now that you have installed the ApexSketch Portal™ on your device. You will be prompted to sign in the first time you launch the application. Enter the **email** and **password** provided to you by your Portal administrator and/or Apex representative.

If you have not yet signed up for the ApexSketch Portal™ and would like to inquire on what it would take to get your organization signed up, feel free to reach out to us @ 1-800-858-9958.

Step 3 – Creating a "New" Sketch

Now that you are signed in and have access to your ApexSketch Portal™ you can start creating sketches.

1. To get started click/tap on the **New** button at the top left of your **Sketch Library** page.

2. This will bring up the "Property Record" dialog where you will enter the details on the sketch you will be creating. Below is a breakdown of what each field is.

Location - These fields are required to create a new sketch in the ApexSketch Portal™

Sketch Filename – This field is what the ApexSketch file will be named if you download if from the ApexSketch Portal™. If left blank, the file will be downloaded using the address as file name.

Subject Info – These fields are optional and allow for collecting additional data on the property.

Note: Parcel Number and File No. fields are searchable from the Sketch Library page. You can also list your sketches by Parcel Number or File No. via the Filter tool.

Records Tags – Allows you to tag a sketch with pertinent information that you would like to filter by (*i.e., Amenities like pools, Type of Field visit, Initials of an inspector, neighborhood, etc.....*)

Step 3 – Creating a "New" Sketch

3. Once the "Property Record Card" has been filled out, select **Ok** at the bottom right to create the sketch record.

4. You can now select **Open in AvX** to open ApexSketch vX and start creating your sketch.

Tips & Tricks Getting Started

For more tips and tricks on getting started using the ApexSketch Portal™ you can visit our YouTube channel @ApexSoftware via the links below.
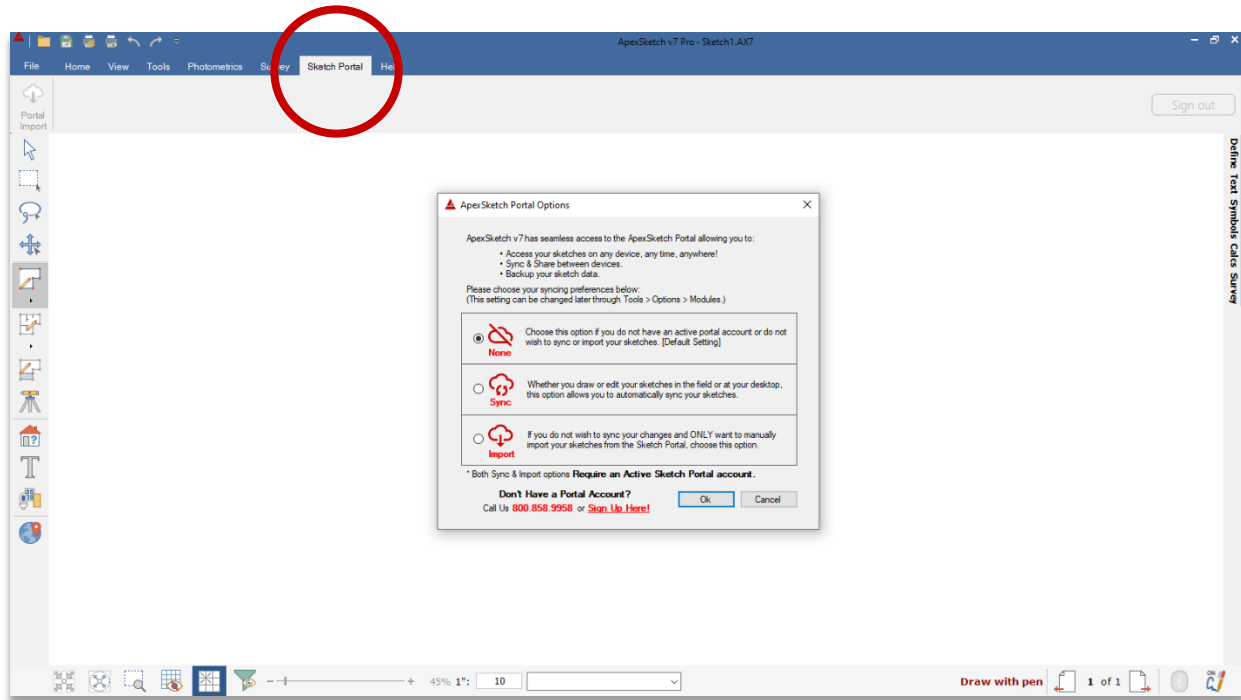
How the ApexSketch Portal works

ApexSketch vX – Getting Started
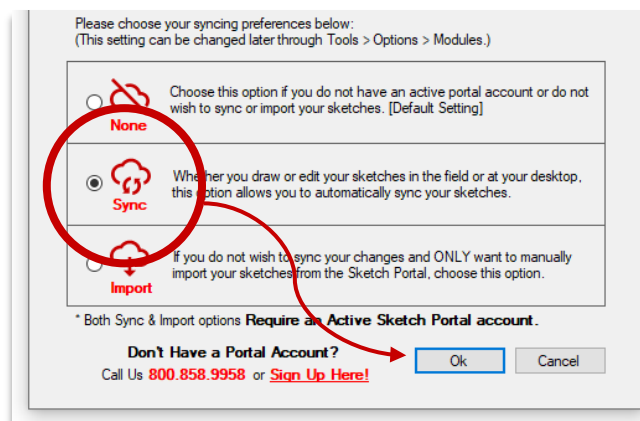
ApexSketch vX Complete play list

Step 4 – Activating Sketch Portal module in ApexSketch v7

The final step in taking advantage of the full functionality of the ApexSketch Portal™ is to activate your Sketch **Portal Pro module** in ApexSketch v7. This allows you to seamlessly sync and / or import sketches from the ApexSketch Portal™ with ApexSketch v7.

1. Open ApexSketch v7 from the desktop icon. Once the application loads, click on the **Sketch Portal** tab in the ribbon bar going across the top of ApexSketch v7. This will bring up the **ApexSketch Portal Options** window.
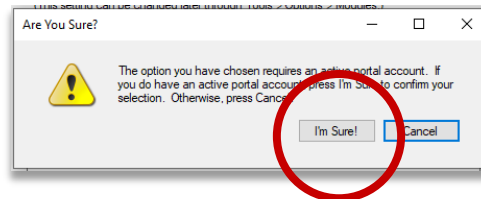

2. From the list of options shown in the **ApexSketch Portal Options** window, check the option for **Sync**. Once selected, click the **Ok** button to submit the request.
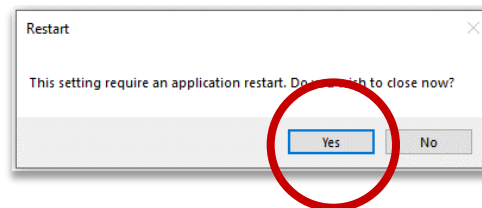
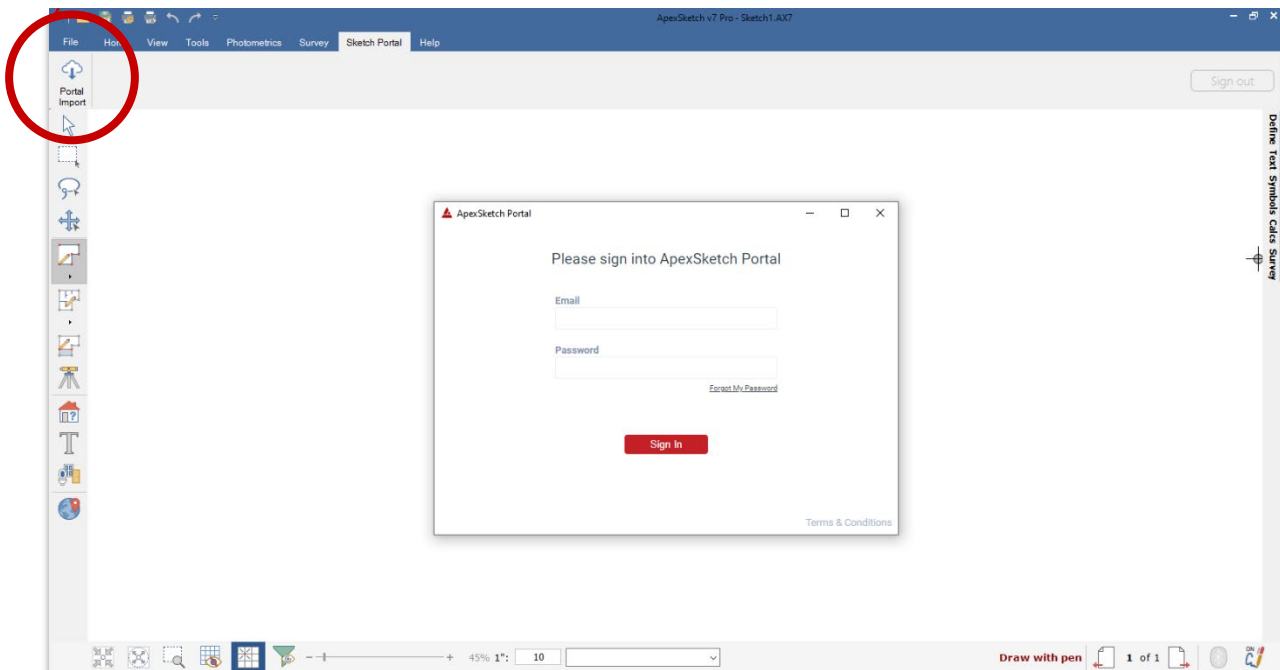# Step 4 – Activating Sketch Portal module in ApexSketch v7

3. Next you will receive an "*Are you Sure*" message, click **I'm Sure** to continue.

4. Finally select **Yes** to close the application and then <u>**Reopen ApexSketch v7**</u>.

5. Once ApexSketch v7 reopens, go back to the **Sketch Portal** tab and click on **Portal Import** this will bring up the login window allowing you to login to your ApexSketch Portal™ account.

Congratulations, you are now ready to start using your ApexSketch Portal™!