Mobile App User Guide

iOS Devices

Contents

Technology should strengthen human relationships, not replace them. The Mobile app allows financial professionals to reach out to their clients while on the go. Financial professionals and their teams can use the app to build and grow relationships through compliant social media, texting and local websites

This guide provides an overview of the Mobile app features and tools which help you along the way.

Product Overview

Yext's Mobile app combines the content publishing of Social with the text and voice calling capabilities of Relate into one app. It enables users to focus on the most important part of their job—building and servicing relationships—without the friction of switching between apps or the fear of compliance backlash.

KEY FEATURES

Some of the high level capabilities of the Mobile app:

- Sending text messages
- Scheduling texts and reminders
- Scheduling meetings
- Sharing on-demand links
- Making and receiving phone calls to your current device
- Publishing content to connected accounts and websites
- Sharing original content to connected accounts

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> "Our field is the most productive it has ever been. We feel so much closer to our clients now that we are able to reach them at these critical moments."

Download & install the Mobile app

Apple iOS Devices

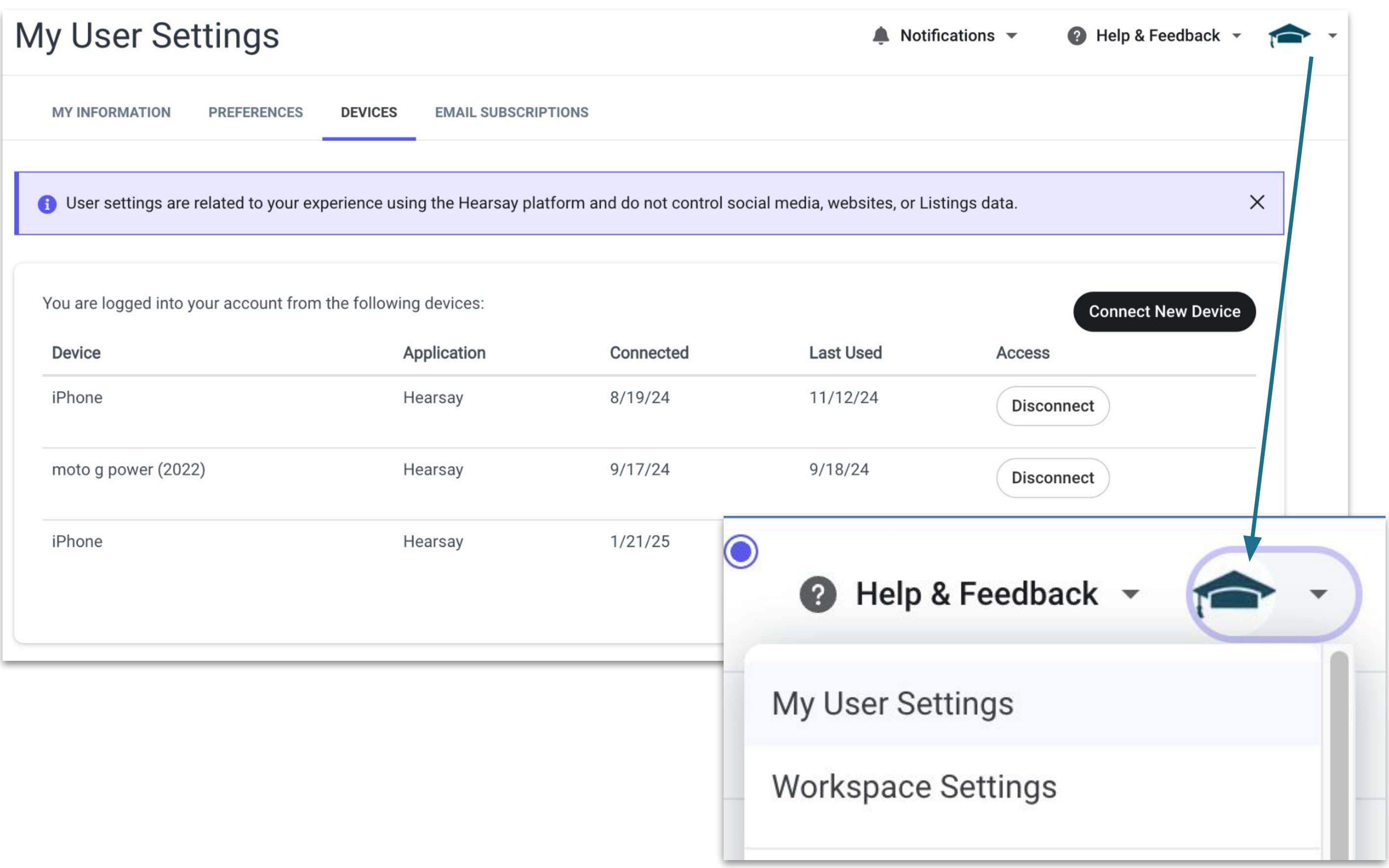
Follow these instructions to download and install the Yext Mobile app for iPhone and iPad:

1. Tap on the App Store application on your iPhone or iPad.
2. Search for Yext.
3. Tap on the Yext Mobile app from the list of search results.
4. Tap Get.
5. Tap Install.
6. Type in your Apple ID password and select OK if applicable.

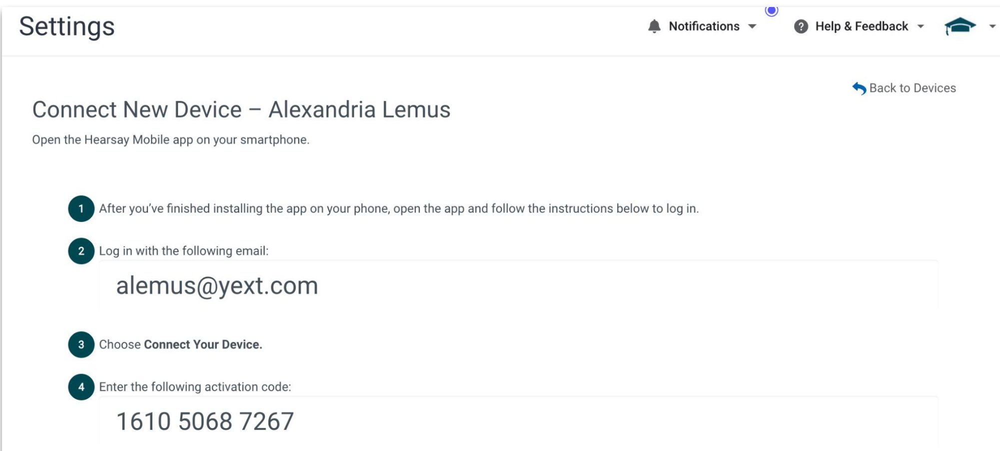
Authorize your mobile device

Before accessing the Mobile application, make sure that your mobile device is synced and authorized by your workspace.

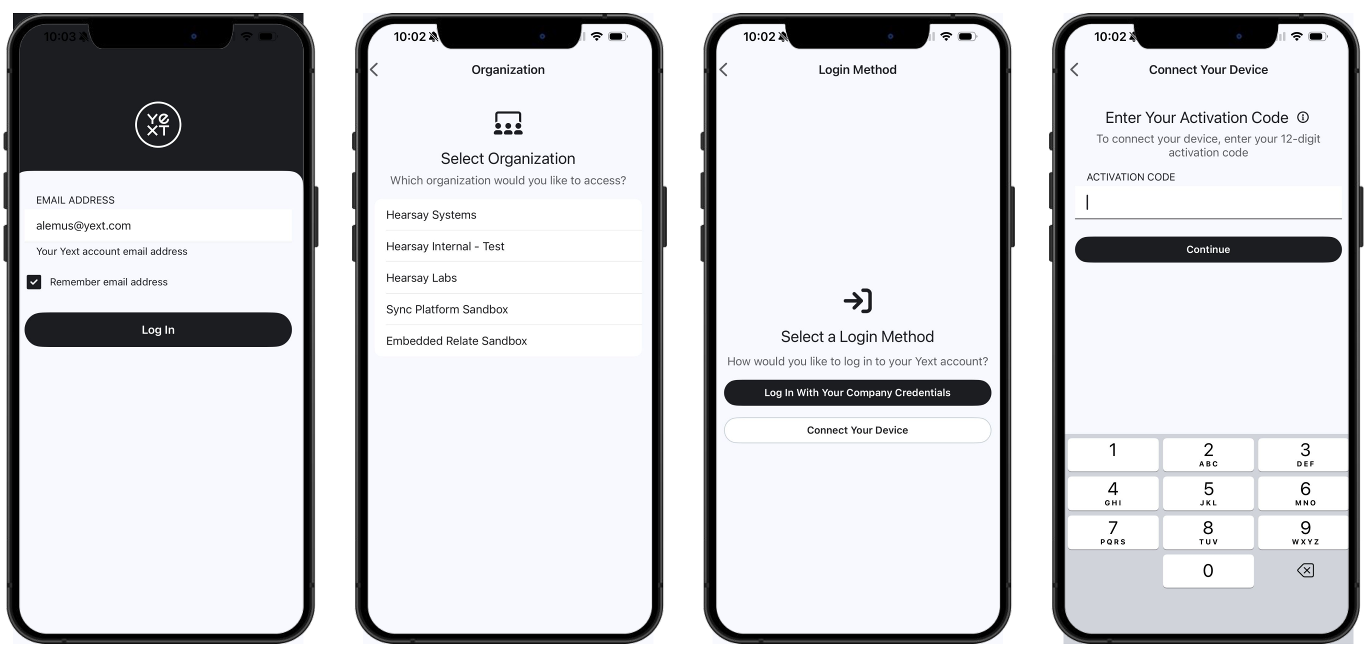
1. Log into your workspace on your desktop computer.
2. Click your workspace icon and choose. **My User Settings**.
3. Then choose **Device Settings**. You'll likely be prompted to log in again.
4. Click **Connect New Device** in the top right corner.
5. Open the Yext Mobile app on your device.



6. You will be presented with instructions on the next page, highlighting your user email address and activation code in Steps 2 and 4. Keep this information open on your computer, and open up the Mobile application on your mobile device.



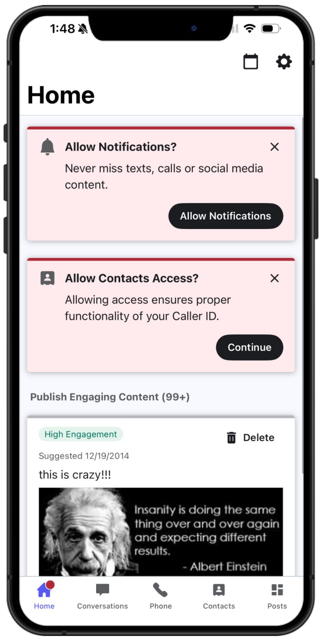
7. When the Mobile app opens for the first time on your phone, you will need to log in. Enter the email address you were presented with in Step 4 and click Continue. **Pro Tip:** Click the Remember Email box for easy access.
8. Click **Connect Your Device**.
9. Enter the activation number you were presented with in Step 4 to complete the authorization process. You'll then be able to select your workspace if you have access to more than one.



Getting started

Once you've authorized your mobile device to your workspace, you'll be able to start the onboarding process and access the Home tab for the app.

You'll also see action cards on the Home tab to enable notifications and to allow access to contacts, if desired.



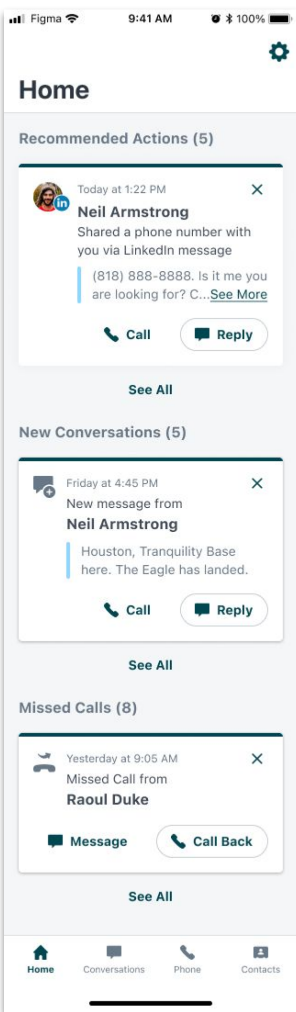
As you tap on the other tabs across the bottom, you'll be prompted to complete the app onboarding process.

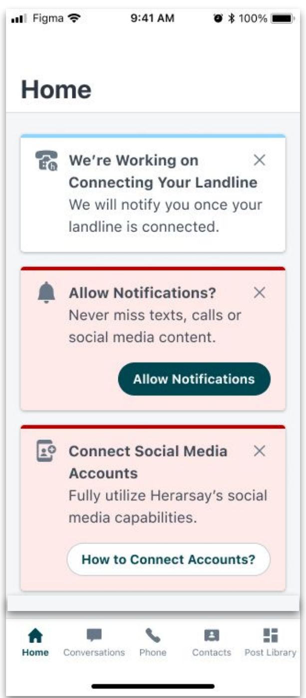
Home tab

The Home tab in the Mobile app will display a number of Action cards similar to those found on the web platform. These cards will guide you through tasks to complete your onboarding. The displayed cards will change depending on which tasks are still outstanding.

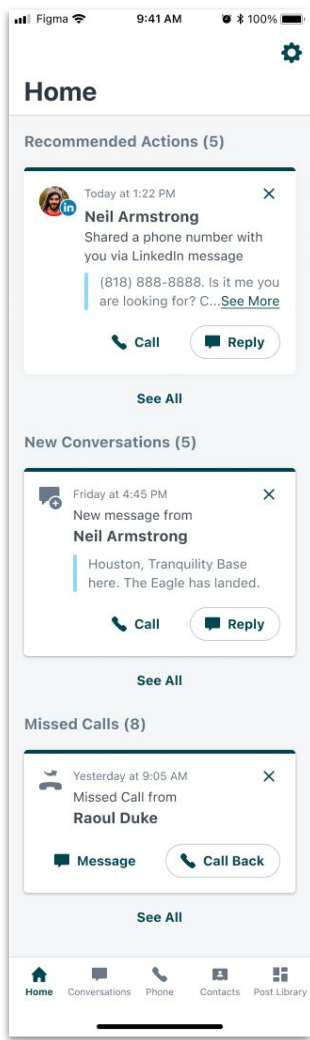
Examples of Action cards

Card order

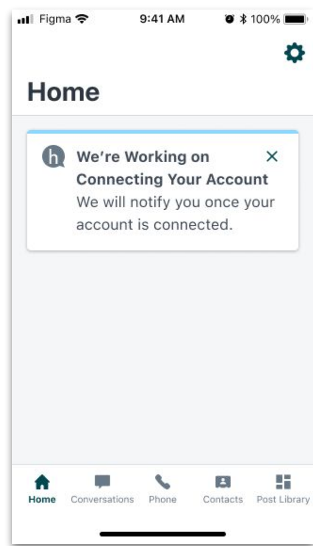




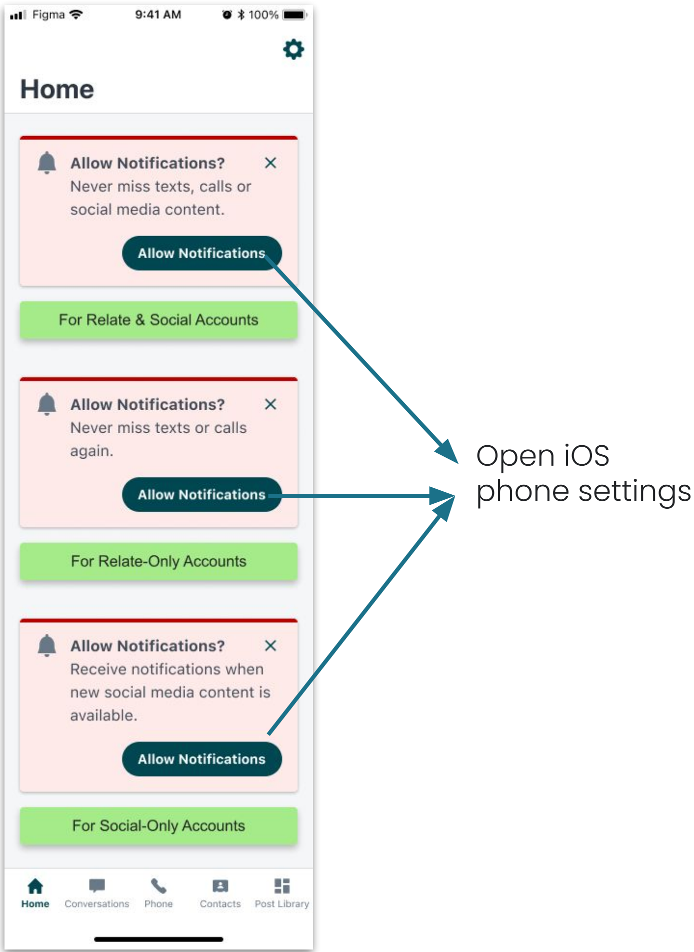
Relate only



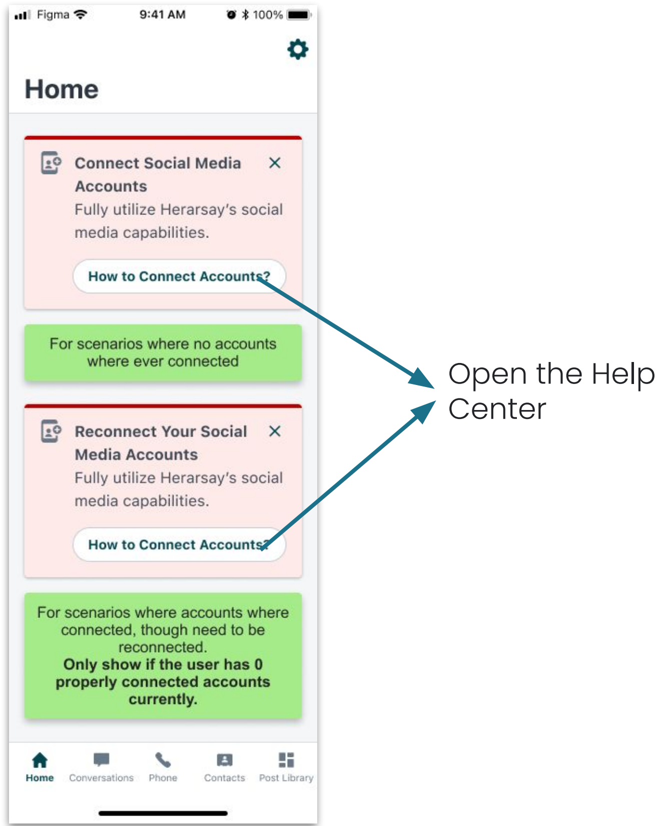
Landline provision in progress

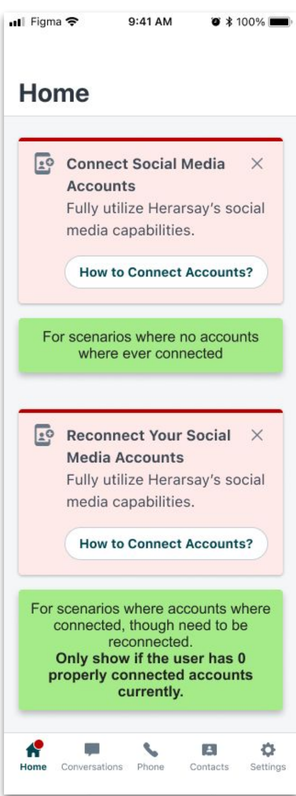


Notifications



Connect Social accounts



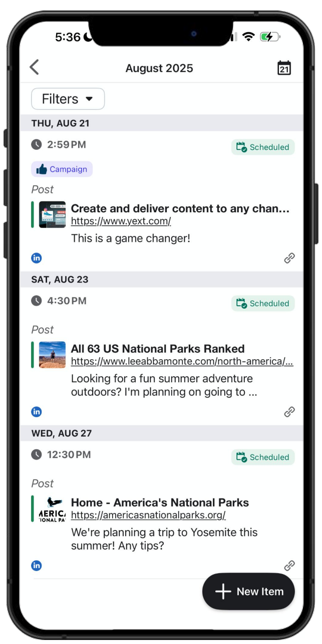


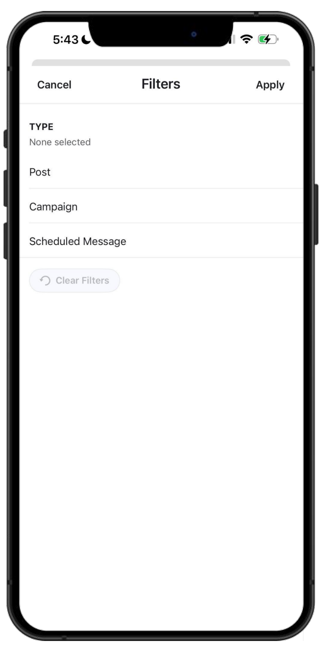
Timeline View

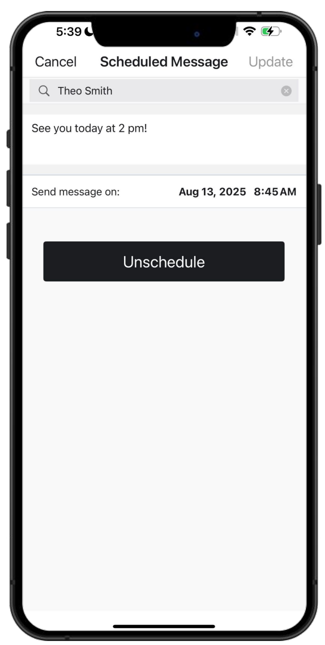
Mobile users can now view, reschedule, edit, and filter for scheduled activities from their mobile devices on the new **Timeline** page. The Timeline helps users avoid scheduling conflicts and cadence issues. For example, a Social user can quickly check if any of their posts are scheduled to publish around the same time as a campaign post and adjust scheduling if needed. A Relate user can reschedule or cancel text reminders quickly and easily.

Users with Relate and Social can see all their posts, campaign posts, and text message activities together in the Timeline. Relate only or Social only users only see activities associated with their product access.

To access the Timeline, tap the **Calendar** icon on the top right of the Home page. Then, scroll through the scheduled activities or tap the **Filters** dropdown to filter for posts, scheduled campaign content, or scheduled messages. Tap on a scheduled message or post to review, edit, or unschedule it.





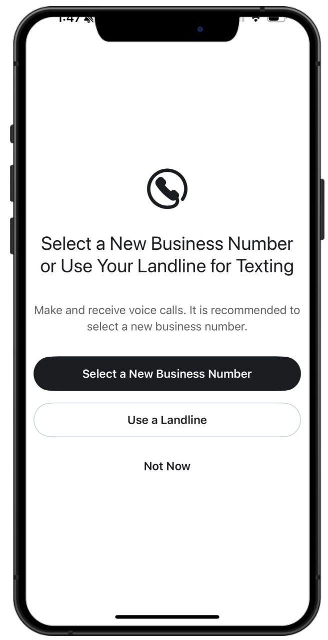


Get a Relate number

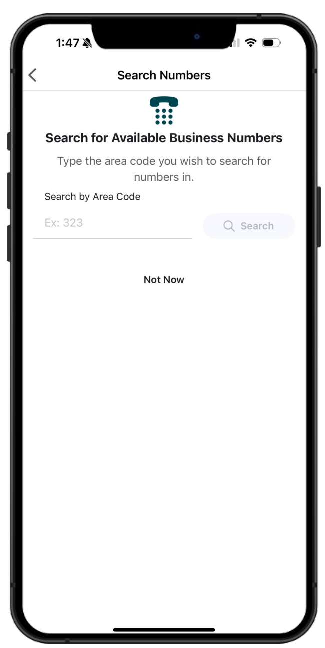
Once you've authorized your mobile device to your workspace, you'll be able to choose between obtaining a FREE Relate dedicated number or connecting your text-enabled landline phone number.

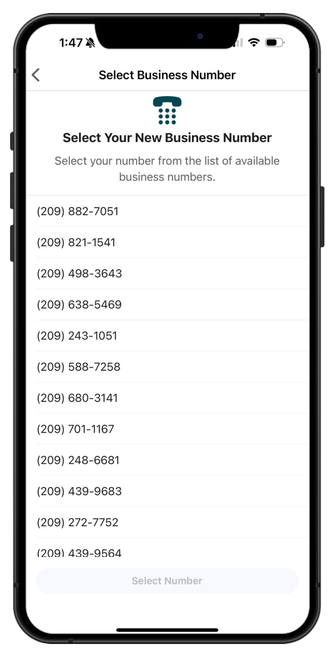
To get a Relate dedicated number:

1. In the mobile app, click on the prompt to get a new number or click on the Conversations tab at the bottom of the screen. You will have the options to Select a New Business Number, Use a Landline or Not Now. Skipping setup will take you back to the previous screen.

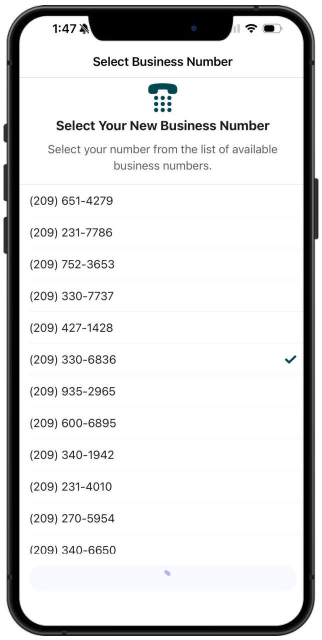


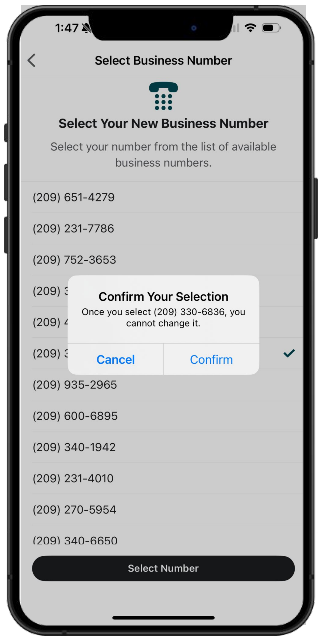
2. To get a dedicated Relate number, click Select a New Business Number. You will need to enter your area code to search for a new number. If numbers are available, you will see a screen with available numbers. If not, you can search another nearby area code.



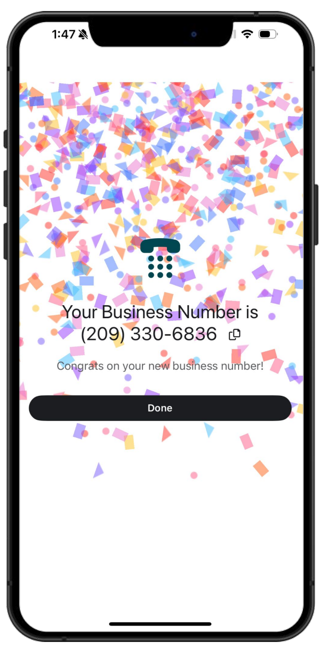


6. After reviewing the available numbers, you can select the one you prefer. You will then be asked to confirm your selection in the pop-up notification.





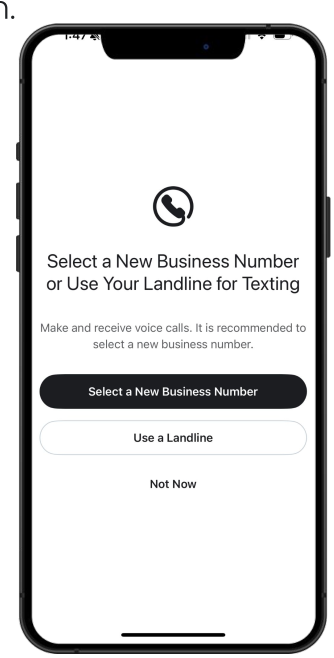
7. After confirming your number, you will see the “Congratulations” message. You can then click **Done**. You have the option to copy your new business number by tapping the paper icon next to it.



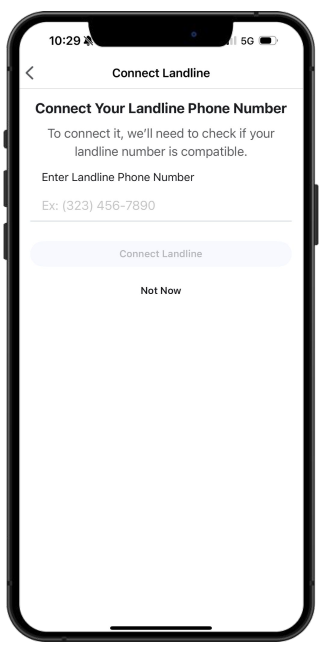
Connect your landline number

To connect your existing landline number:

1. In the mobile app, click on the prompt to enable your landline number or click on the Conversations tab at the bottom of the screen. You will have the options to **Select a New Business Number**, **Use a Landline** or **Not Now**. Skipping setup will take you back to the previous screen.

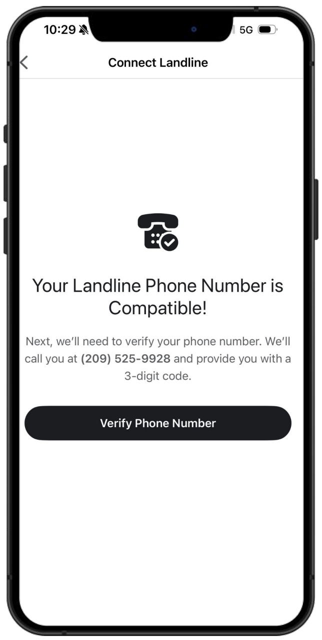


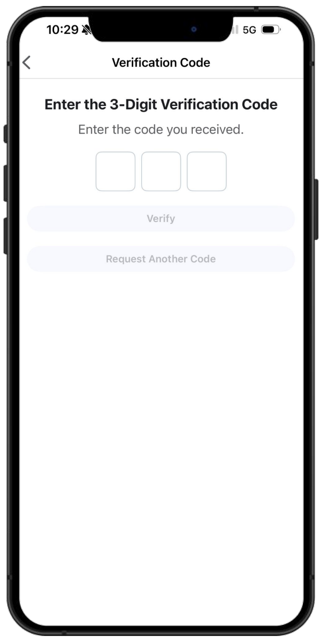
2. To connect your existing landline number, tap **Use a Landline**. On the next screen, enter your landline phone number to check for compatibility. After typing in your number, tap **Connect Landline**.



3. If your landline number is compatible, you will have the option to **Verify Phone Number**. Tapping **Verify Phone Number** will authorize Yext to call you with a three-digit verification code you will need to enter on the next screen and tap **Verify**.

   If you type in the wrong code, or your code expires, you will receive an error message and you can type it in again. You can also request another code if you need to.





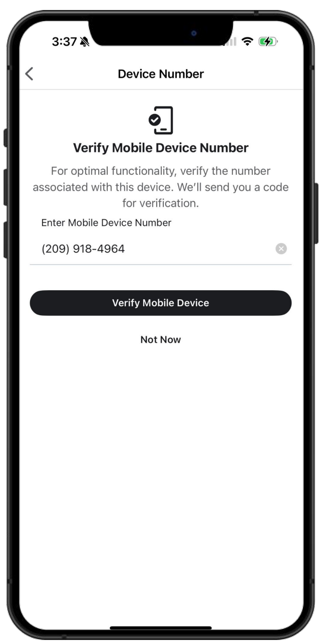
4. After clicking verify, Yext will then prepare your landline for use. This step does not require any action on your part. You will see the Action card on your Home tab notifying you that Yext is connecting your landline.
5. You will receive a Mobile app notification when your account and number are ready. Opening the notification will take you to the Mobile Home tab.

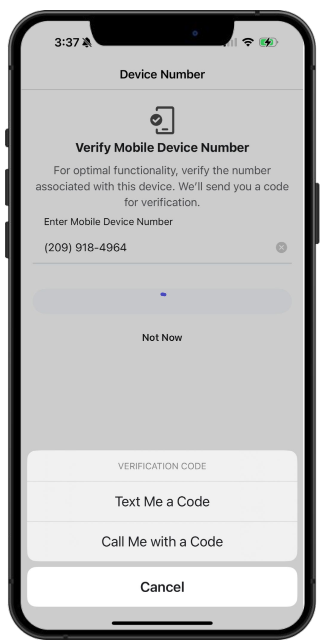
If your landline number is not compatible, you will see a screen asking you to try another number. Clicking on **Get Help** will open a Help Center article with information on how to connect your landline number.

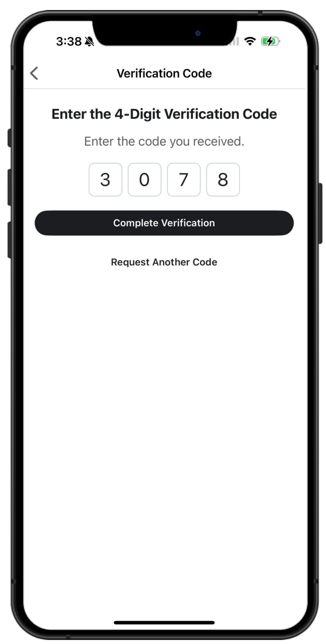
Verify your mobile device number

You will need to verify your device phone number before you can direct calls to your mobile device.

1. From the number confirmation screen or **Settings** tab, you will need to tap **Verify Mobile Device**. This will open a screen to enter your mobile device number.
2. Type in your mobile device phone number and tap **Verify Mobile Device**.
3. You'll see options for **Text Me a Code** and **Call Me with a Code**.
4. Enter the code and tap **Complete Verification** to finish the verification process.

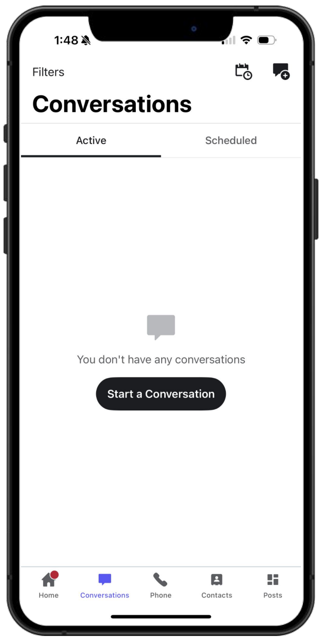






Conversations

Once you're set up on Relate, you will be able to view, send, and schedule text messages from the **Conversations** tab.



Attestation on the Mobile Application

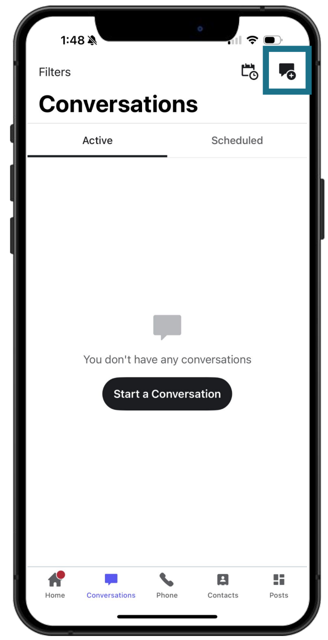
Attestation is the process of requesting permission to text customers or prospects. This means getting legal consent to have communication and activity monitored and retained.

In order to text compliantly, your organization will have chosen from one of the following opt-in methods:

- **Opt-In**: Requires the user to send the opt-in message. The contact must respond "YES" in order for the user to send additional text messages.
- **Personalized Opt-In**: Allows the user to include a greeting that appears prior to the opt-in message. The contact must respond "YES" in order for the user to send additional text messages.
- **Implied Opt-In**: The user sends the implied opt-in message and is able to send follow-up text messages directly after. The contact can opt out of the conversation at any time by responding "STOP".

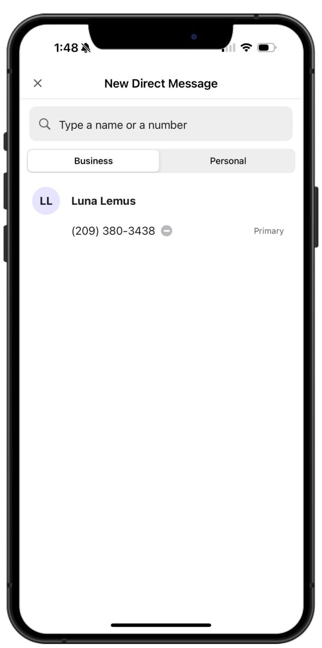
To send the opt-in attestation message via the Mobile app, follow the steps below:

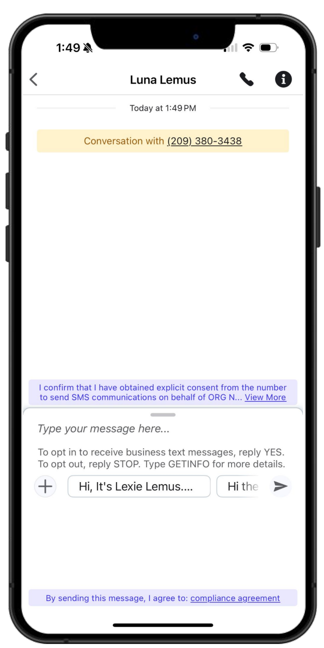
1. Navigate to the **Conversations** tab.
2. Tap the speech bubble in the top right corner of the application.

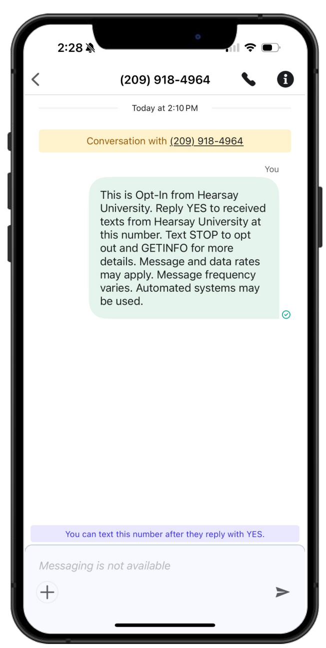


3. Type in the number you wish to text or search the name of the contact. Then tap the number when completed.
4. The opt-in message will appear in the text box for you to read and review. If your organization allows, you can personalize this message and click the arrow to send the opt-in message. If not allowed,, simply click the blue arrow to send the opt-in message as-is.

   Note: The Opt-in message has a 160 character limit.







5. The conversation will display “You can text this number after they reply with YES” until your contact responds with “Yes”. Then you’ll be able to text them.

If the contact does not respond for 24 hours, you will be able to re-send the opt-in message again, up to 5 times in total.

Implied Opt-in Attestation

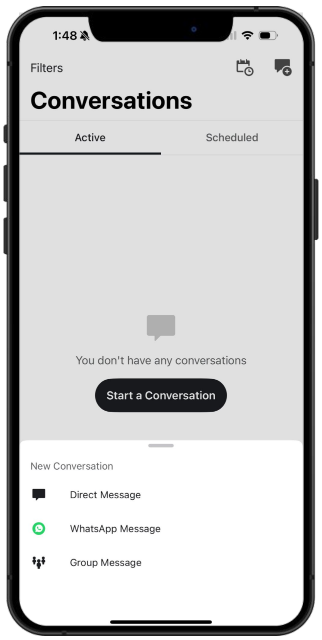
Another option is the Implied Opt-In method. This prompts you to first send the opt-in message. However, you can begin texting your contact without the contact needing to respond YES. Your contact can opt out of the conversation at any time by texting STOP.

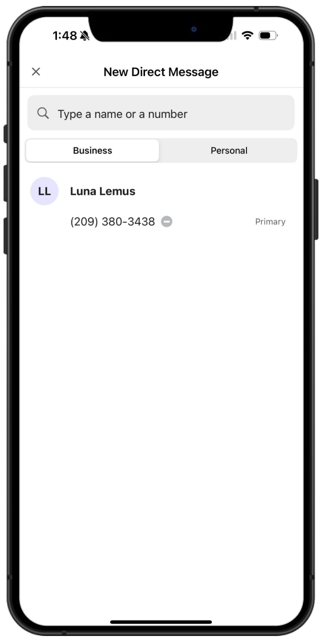
If a contact writes STOP, the system will send a message on your behalf letting the contact know that communication has been halted. However, the contact can respond UNSTOP to reinstate communicatio. If the recipient texts GETINFO, a message will be sent with a web link to more information (this link is set by your organization).

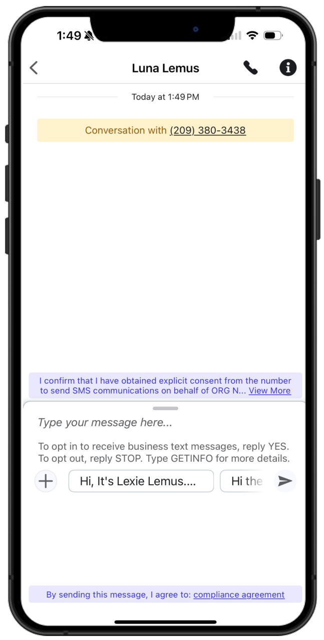
Send Text Messages

To send a new text message within the Mobile application:

1. Tap the **Speech Bubble** icon and select **Direct Message** to send a text message.
2. You will be prompted to choose a contact.
3. Once chosen, type your message. Depending on your organization's policy, you may be able to add a photo, link or your contact card to the message.
4. To send the message, tap the arrow.







Send Quick Replies

With Quick Replies, you can leverage auto-generated replies within the app by choosing from three automatically generated messages designed to help you respond quickly and keep the conversation going.

To use Quick Replies:

1. Once a response from a contact is received, you can choose from three automatically generated messages.
2. Click on the **Quick Reply** that you'd like to send.
3. The selected message will appear in the text field. Please edit and customize the text if you'd like.

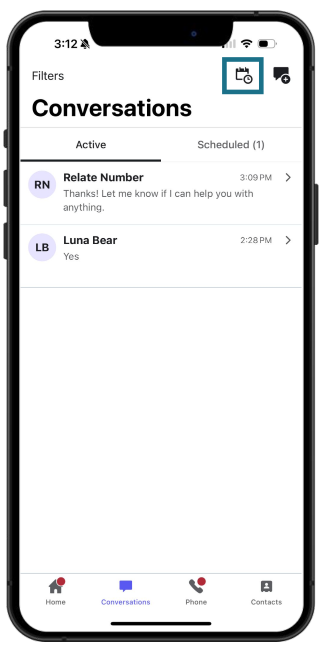
Schedule Text Messages

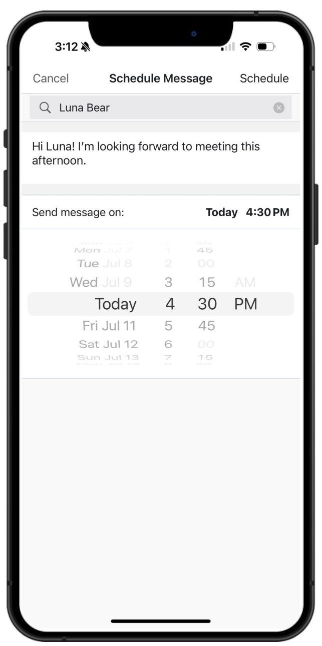
You have the option to send a text message immediately or schedule it to send on a date and time that you select.

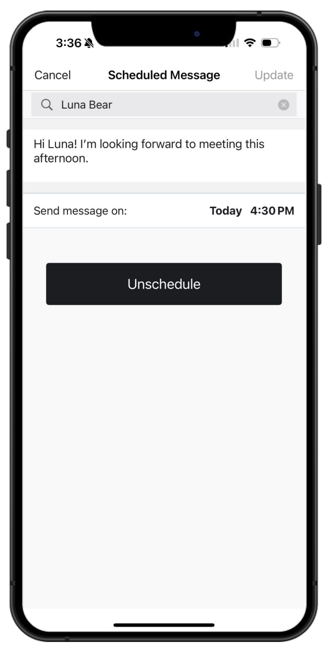
To schedule a new text message:

1. Tap the **Calendar** icon next to the speech bubble icon to schedule a text message.
2. You will be prompted to choose a contact.
3. Once chosen, type your message. Then select a date and time for the text message delivery.
4. To finish, select **Schedule**. The scheduled message will appear when you click on your Scheduled messages tab.

You can modify a scheduled text message by opening it within your **Scheduled** messages. This will allow you to change the text, date, and time of the message. You can also unschedule the message entirely.







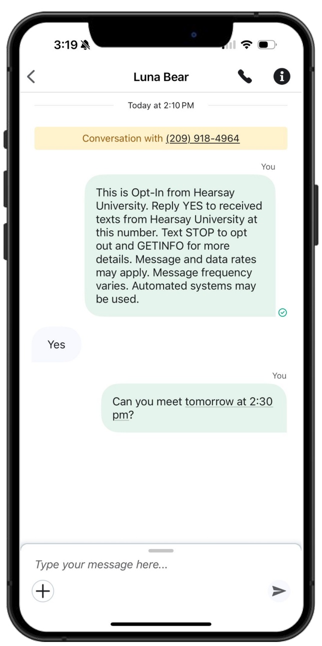
Schedule a Calendar Event

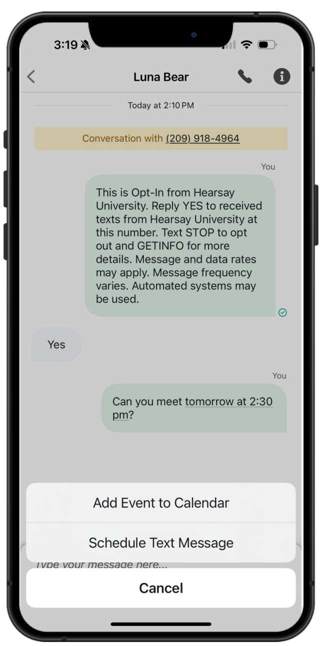
When using the Mobile app, you can schedule events directly from a conversation. The app will detect text messages that include a date and time and will underline this specific information. By tapping the underlined text, it will prompt you to choose between:

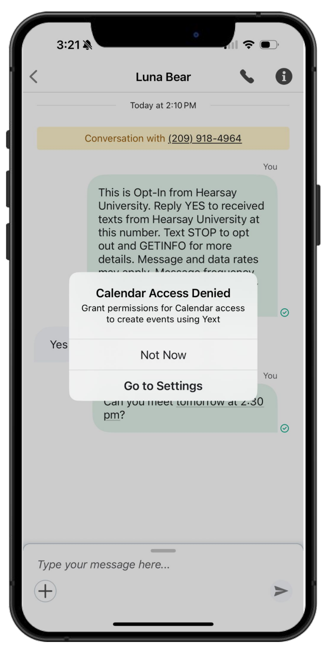
- **Generating a Calendar Event:** Add an event to your mobile phone's calendar, including the name and phone number of your contact, at the date and time specified in the underlined text.
- **Scheduling a Meeting Reminder Text:** Edit and send a templated text message reminding your contact of your upcoming meeting set at the underlined date and time.

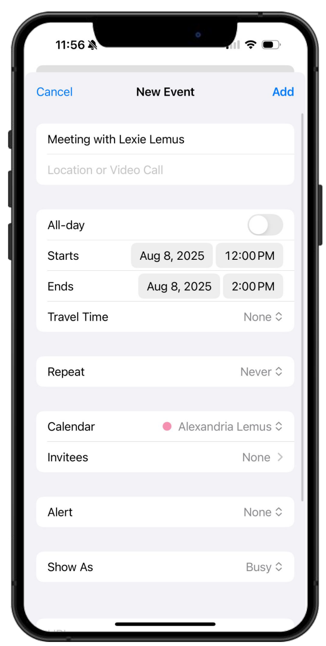
To add an event to your calendar:

- Open a conversation within the app. It will automatically detect and underline dates listed within your conversation. It uses the context in which the date is referenced, such as this “Friday” “This Friday” and “Next Friday,” to suggest a date.
- Tap the underlined date and a menu will appear. Tap **Add Event to Calendar** to generate an appointment on your phone’s native calendar app, such as iCal for iPhone users.
- Edit the information as needed and tap **Add** to finish this process.





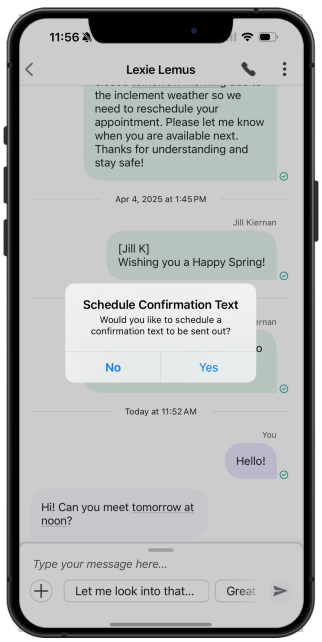


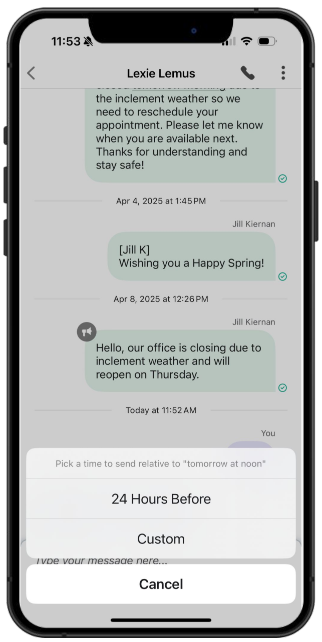


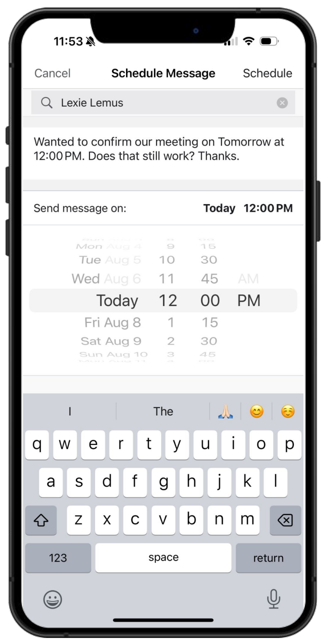
Schedule a Confirmation Reminder Text

To schedule a meeting reminder text:

1. After adding an event to your calendar, you will be prompted to schedule a confirmation reminder text.
2. Tapping **Yes** will give you the option to schedule the confirmation reminder text 24 hours before the meeting or at a custom time.
3. Edit the message template, the date and time, and tap **Schedule** to save the message.





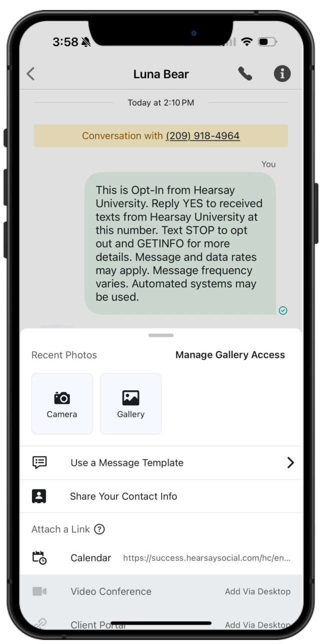


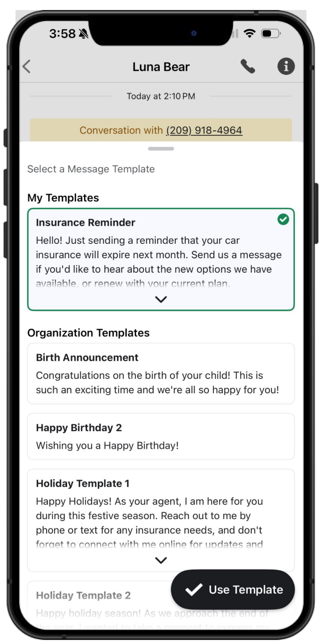
Using Message Templates

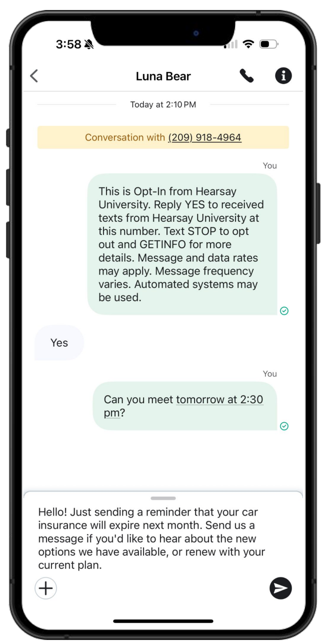
There are two types of message templates that can be used in text messages: admin-created message templates and user-created templates. User-created templates have to be created on the web platform before they'll be available in the app.

To use a message template:

1. Open a conversation within the app. Tap on the plus sign and then select **Use a Message Template**.
2. You will see your templates and Organization Templates. Tap on the template you want to use.
3. Then tap Use Template and edit the text.
4. Tap the arrow to send.







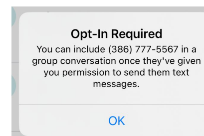
Group Texting

Group texting allows you to create and message a group of users. Some things to know about group text messages:

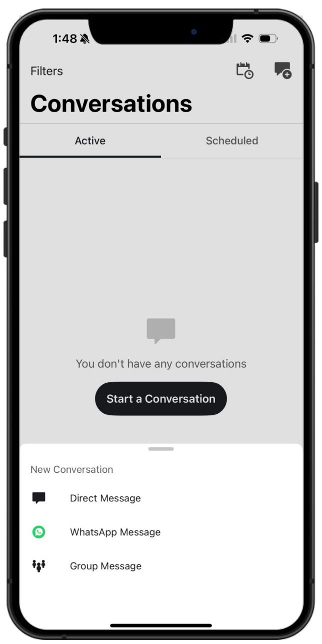
- All numbers must be opted in before creating the group
- The members of the group cannot be changed after the group is created

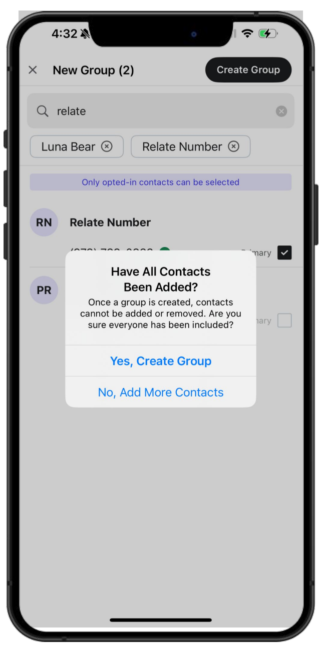
To create a group text:

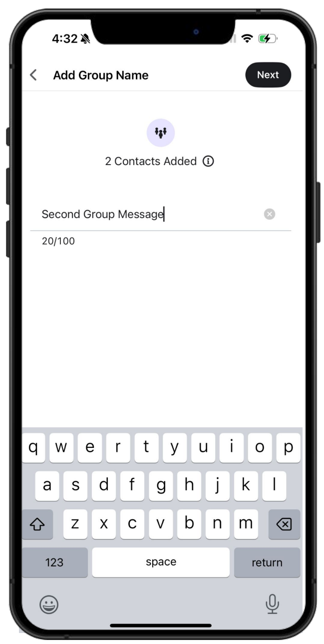
1. Go to the Conversations tab and tap the dark blue speech bubble at the top right. Then select **Group Message**.
2. Select the members of the group. If a number has not yet opted in, then you will see a pop-up notifying you that opt in is required.



3. Name the group text and click **Next**. Now you can send a group text message.





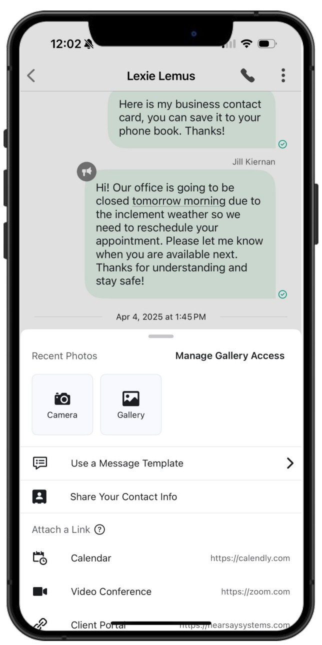


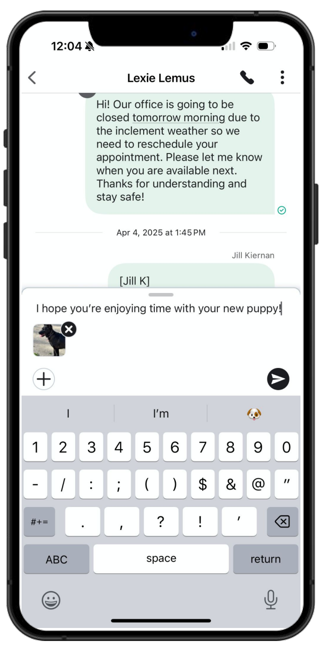
Share Images/Attachments in Text Messages

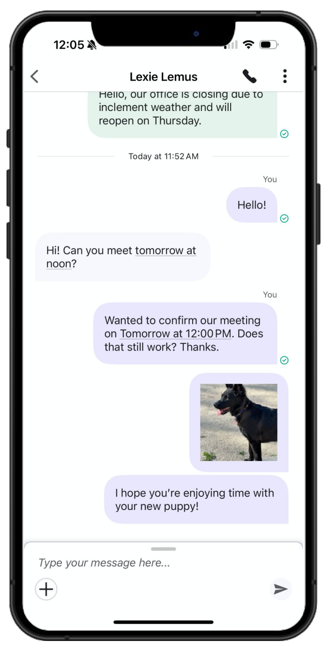
Grab your customer's attention and build relationships with visually engaging content like birthday wishes, report screenshots, and documentation photos. You can send outbound picture messages through the app by selecting photos from your camera roll or taking an in-app picture. Check your organization's compliance policy regarding the type of attachments you are allowed to send.

To send an attachment via the Mobile App:

1. Open a conversation and tap the plus sign at the bottom of the screen.
2. Tap the **Camera** or **Gallery** icon.
3. The camera roll on your device will be shown in the app, giving you the option to pick a photo to send or initiate taking a photo. If you grant permission with the pop up, you'll have the option to select from all your photos.
4. Add text and tap the arrow to send.







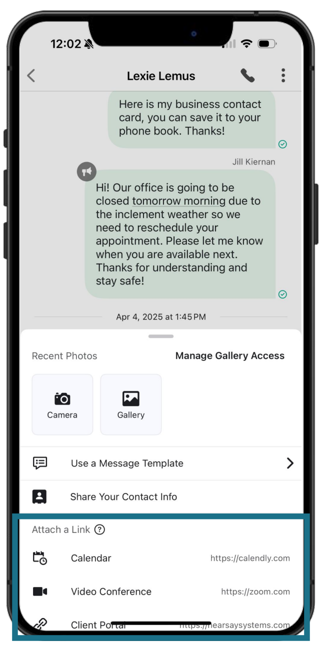
Important Notes for Users:

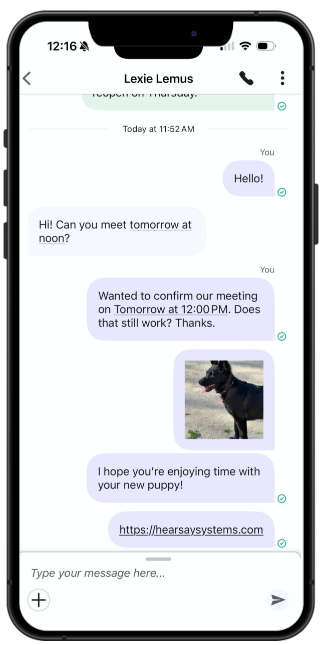
- Users can only send PNG or JPEG images (standard format for iOS and Android photos).
- If the photo was a live photo, it will be converted into a PNG when it is brought into the app.
- The maximum size for media is 2 MB.
- If a user tries to attach an unsupported file type like an MP4 video, an error message will advise the user to try to attach the file in a different format.

Share On-Demand Links in Text Messages

Once you've added links via the Account page on your desktop browser, you can attach them in text messages sent via the Mobile app by following these steps:

1. Open a Conversation and tap the plus button.
2. Choose one of your saved links to have it added to your text message.

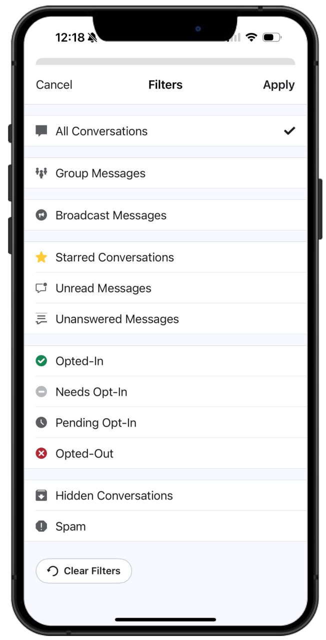




Filter Conversations

You can filter your conversations within the app by tapping Filter in the top-left corner of the Conversations tab.

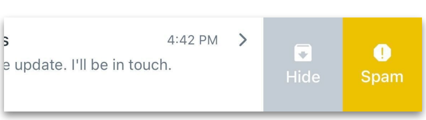
Filter Options:



- **Broadcast:** Messages sent using the Broadcast feature; these cannot be created on the Mobile app but you can respond to Broadcast messages
- **Group Messages:** Messages you've created that include members of a specific group
- **Unread Messages:** Messages you have not yet read
- **Unanswered:** Messages you have read but have not answered
- **Opted-in:** Contacts who have replied YES to your opt-in message
- **Needs Opt-in:** Contacts who have not received the opt-in message
- **Pending Opt-in:** Contacts who have yet to answer your opt-in message
- **Opted-out:** Contacts who have replied STOP to your opt-in message
- **Hidden Conversations:** Conversations you have set to hide and are hidden from your main conversations list
- **Spam:** Conversations you have set to spam and will no longer receive incoming text messages from the contact

To mark a conversation as spam or hide it from view, go to your Conversations tab in the mobile app. Starting on the right-hand side of a conversation, slide your finger toward the left to uncover the **Hide** and **Spam** labels.

- **Mark as Spam:** removes the conversation from your Conversations window and blocks all incoming text messages from the contact.
- **Hide Conversation:** removes the conversation from your Conversations window.



Phone

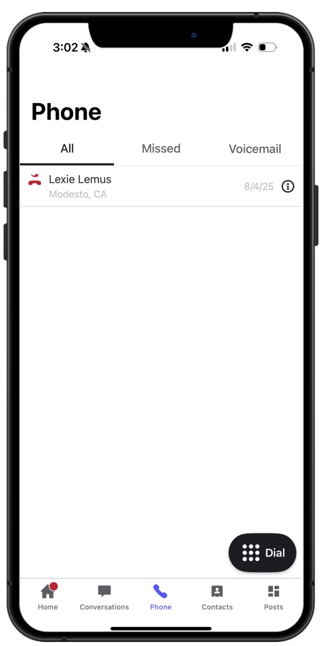
Clicking on the **Phone** tab will open up your call log in the Mobile app.

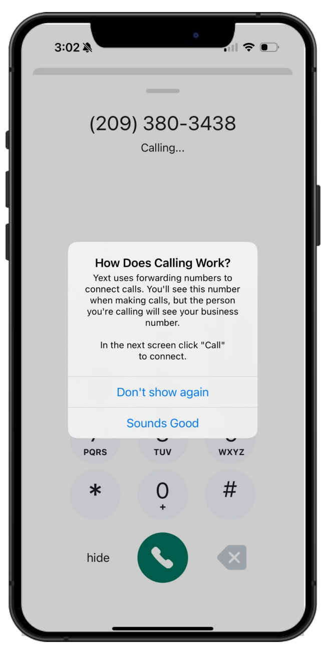
If you remove the connected device phone number but still have call logs available, you will be able to see the existing call log. If you click a number in the log or click on **Dial**, you will receive a message to complete your account setup. You will not be able to make a call from the app until you complete setup.

Using a dedicated Relate phone number, users have the ability to make and receive phone calls directly from their new number.

To make a call:

1. Tap the **Phone** button at the bottom of the screen and click **Dial** to bring up the dial pad.
2. Dial the number you wish to call.
3. Tap the **Phone** icon to make the call.





Make Outbound Relate Calls from Mobile (Outbound VoIP)

With this feature enabled, users can make calls using VoIP technology. Calls will be made all within the Mobile App.

Note: To use this feature, users must enable microphone permissions for the application. These permissions can be found within your mobile device's Settings.

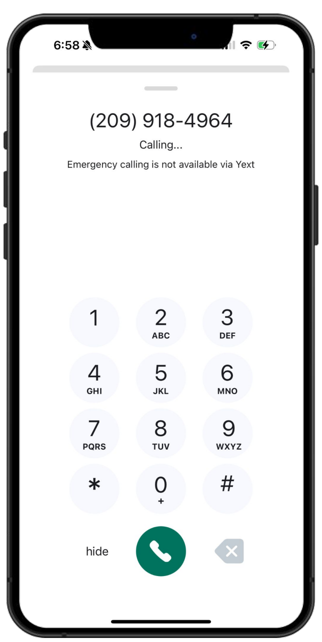
A call can be placed from these locations within the app:

- The contact details
- The dialpad (inputing a number)
- Recents/Missed calls
- From the conversation

FAQs about making calls through VoIP

Q: Does VoIP have any effect on outbound Caller ID?
A: No, if the person you are calling has your Relate number saved as a contact it will appear with that information in your recent calls. Otherwise the call will just appear with your Relate number and no further contact info.

Q: Can I navigate to other places on my phone with an ongoing call?
A: Yes, but fully closing the Relate app will end the call.

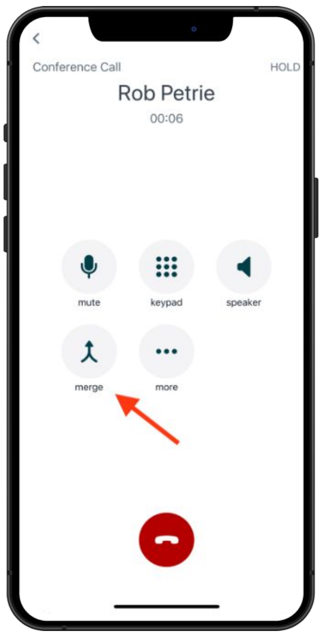


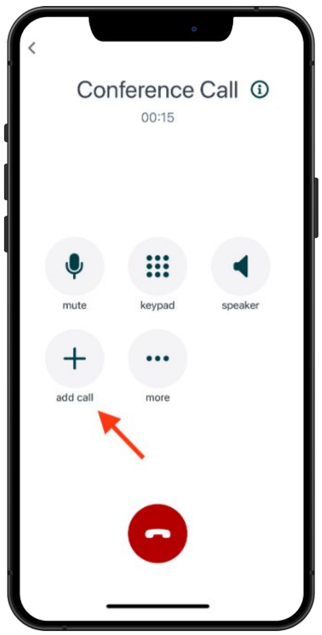
Add and Merge Outbound VoIP Calls

The Mobile app allows you to add and merge and outbound call from the call screen within the Mobile app. This allows reps or members of a client household to join one call.

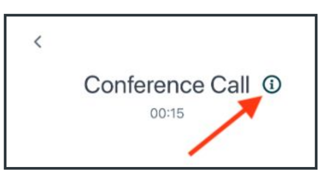
To merge one call to an existing outbound call, tap **Add Call** and select a number from your contacts or dial a new number on the keypad.

Once the call is connected, tap **Merge**. You can do this up to five times to add up to six numbers to the same call.





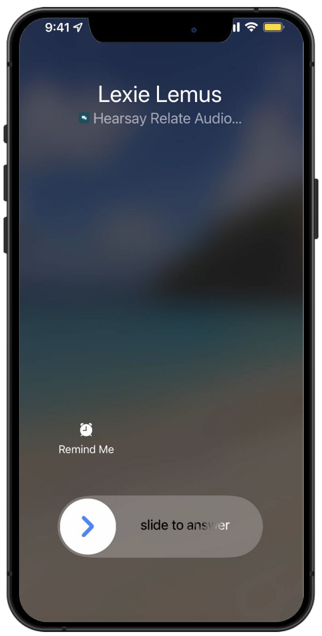
To view or remove participants, tap the **i** symbol next to **Conference Call**.

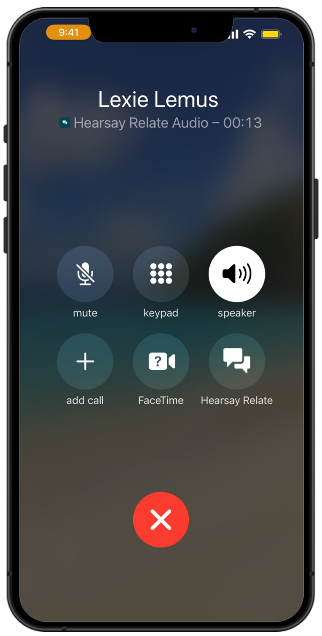


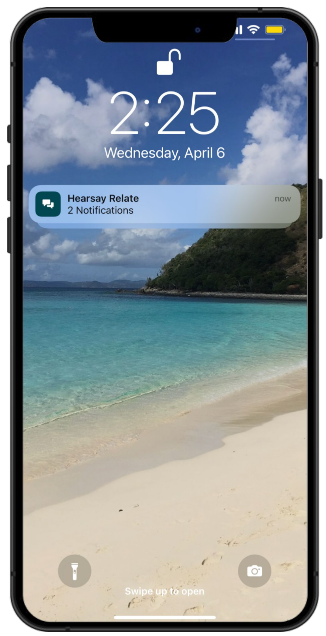
Answer Incoming Relate Calls from Mobile (Inbound VoIP)

Users of the Mobile app with this feature enabled can receive calls using VoIP technology. This also includes a revamped Caller ID that is both reliable and easy to use. When enabled, calls are answered via the Mobile application. Active incoming calls will appear with the contact's name or number and a Audio subheading with the logo. These calls have their own unique ringtone and notification sound.

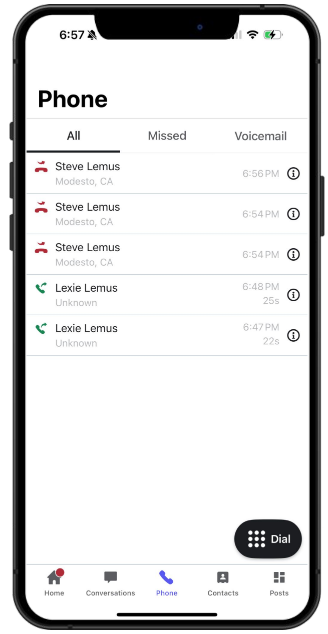
Missed Calls will appear as push notifications on the locked screen or while using the device.







Missed Calls will also appear in the native call logs on iOS and tapping a missed call will open Yext Mobile. Within the Mobile app, missed calls will appear in the Missed tab.



FAQs about receiving calls through VoIP

Q: When I'm using VoIP, what happens if I'm logged out of the Mobile app and I receive a call?

A: If you are logged out you should not receive the call or the push notification for the call.

Q: When I'm using VoIP, what happens if I'm currently active in one workspace and a call comes in to another workspace? (For multi-workspace users)

A: You should still receive the call even if you are in another workspace. Push notifications for calls are tied to the User ID not to the workspace. When answering the call it will open the app in that workspace.

Q: Can I add someone to my current call? (call merging)

A: Not at this time.

Q: While I am on a Relate call can I receive other calls?

A: Yes.

Note: We do not handle 911 calling from Relate with VoIP. When calling 911, the following message will play "Emergency calling is not available via Yext. Please use an alternate means to contact 911."

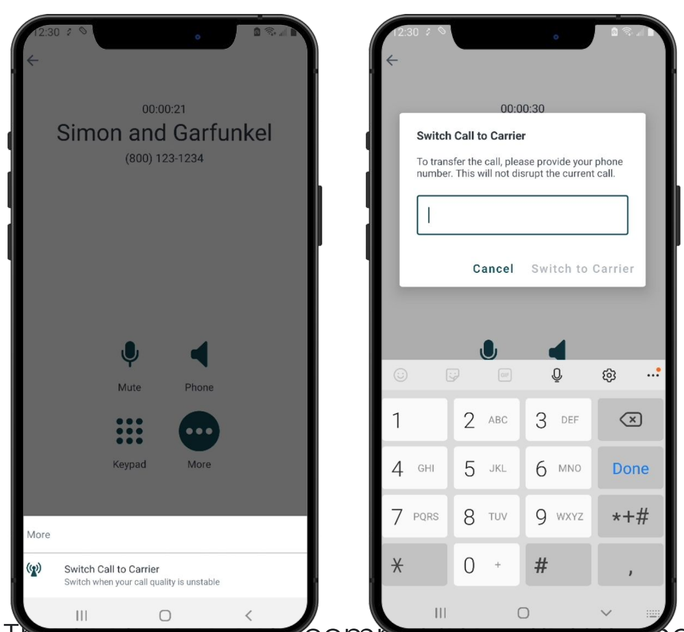
Switching a VoIP Call to Cellular

Relate users that have VoIP enabled can proactively transfer a VoIP call to their mobile phone without disrupting the conversation. Seamlessly transferring the call to your cellular carrier helps to improve VoIP call quality issues due to a slow or unstable internet connection.

From a Mobile VoIP call, "Switch Call to Carrier" initiates an inbound call to swiftly move to cellular without notifying the other caller.

To transfer a VoIP call to cellular:

- On the VoIP call screen, click **More (...)**.
- Click **Switch Call to Carrier**. Enter your mobile phone number, and then answer the incoming call on your mobile phone to continue the conversation. **Note:** After you've transferred your first call, your mobile phone number is saved and you don't need to enter it again.



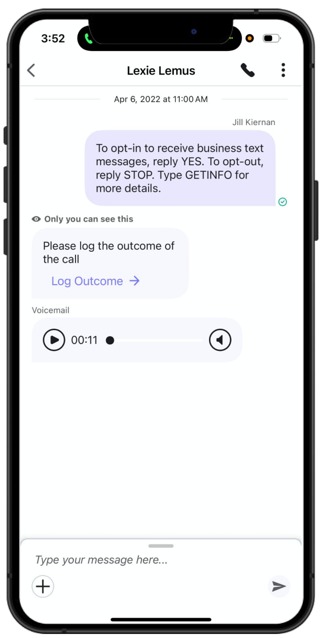
This feature is only compatible with U.S. phone numbers. Your organization must have VoIP enabled to use this feature.

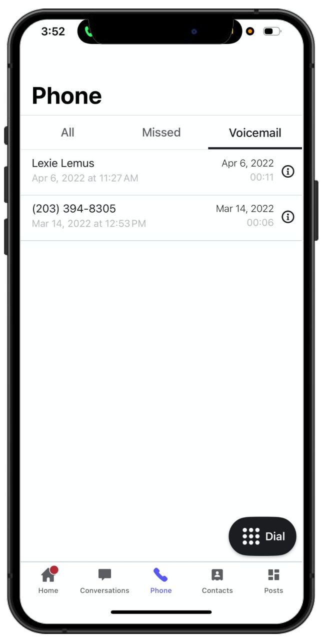
In-App Voicemail

Users of the Mobile app with voicemail enabled can listen to a voicemail message directly from a Relate conversation as well as from the Voicemail list. In-app voicemail increases productivity and improves the client experience by allowing any workspace member to respond to voicemails.

When voicemail is enabled and you receive an inbound call, the phone will ring for approximately 40 seconds and then go to voicemail if no one answers. The caller will hear either the standard greeting or the custom greeting (if set). After you have missed an inbound call, the voicemail will now show up in the conversation as well as in the Voicemail List. This list can be found by navigating to the phone tab and selecting Voicemails from the top navigation bar.

Whenever a voicemail is received, a push notification will appear on your mobile device to inform you that you have a new voicemail





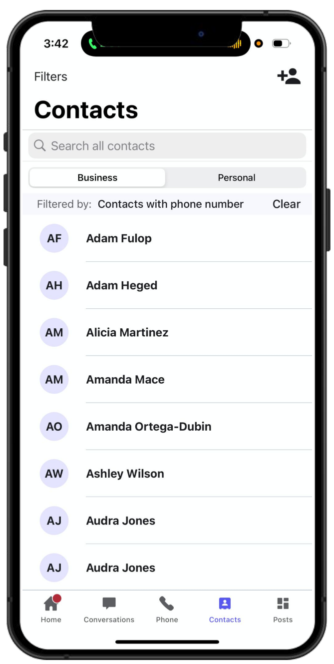
Contacts

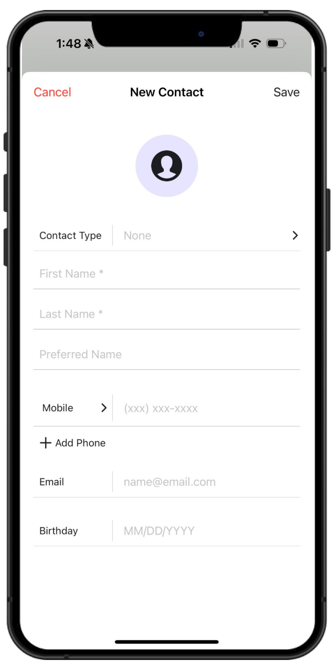
Contacts can be added individually in the Mobile app.

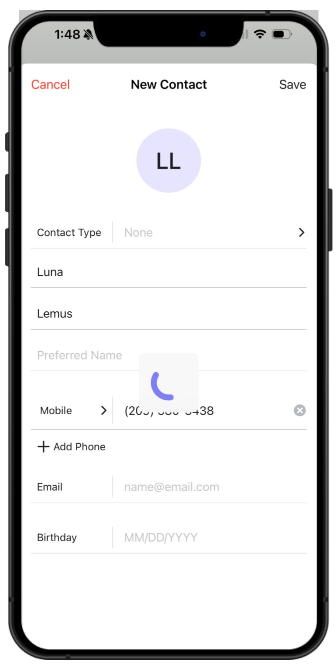
To add a contact:

- Tap on the **Contacts** tab and then click on the icon to add a person.
- Enter in the information and save the contact. You can grant **Contacts** permission within the **Personal Contacts** tab (see Permissions) if allowed by your org.

Once you have added a contact, you can text and call them directly from the **Contact** view. You can also edit the contact by selecting the pencil icon on the top right corner of the app.





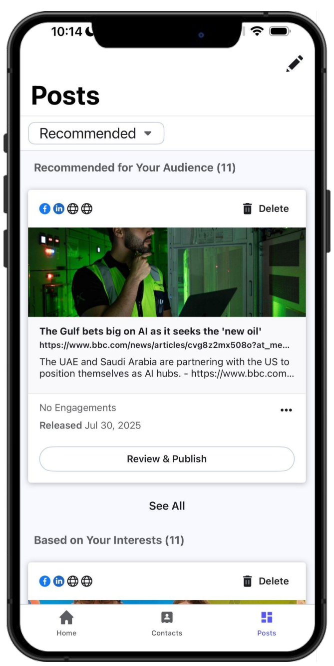


Post Library

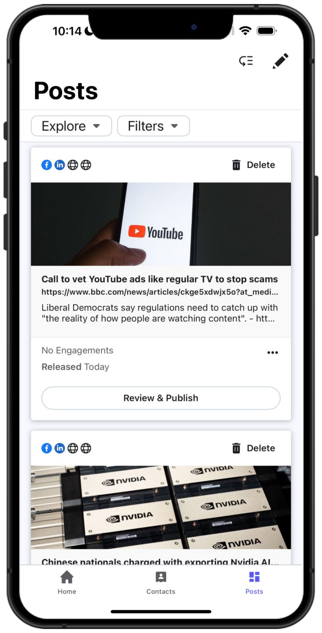
The **Post Library** button in the Mobile app will default to **Recommended** content sorted by the following categories:

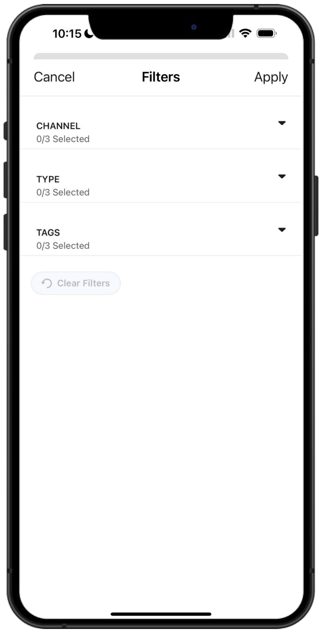
- **Highlights:** Content that is pinned by your organization admins
- Recommended for Your Audience: Content that is most likely to get high engagement with your audience
- **Based on Your Interests:** Content recently added by your organization's content creators.
- **Most Recent:** Content that was most recently added to the Post Library
- **Most Engaging:** Content that is receiving engagement when shared by your peers.
- **Popular With Your Peers:** Content that your peers are sharing the most.

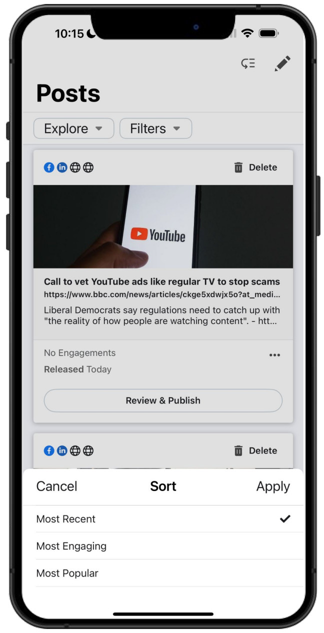
Tap **See All** to view all posts within the category. Once you've located a post to publish, select **Review & Publish**.



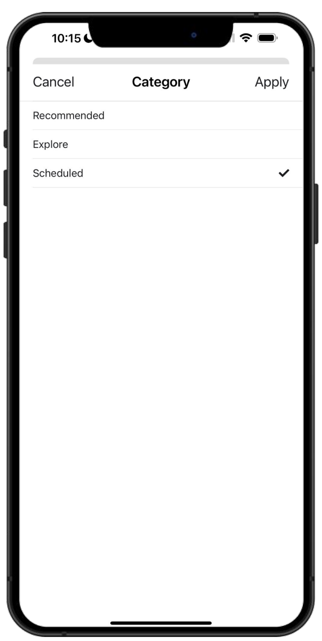
You can change the filter to the **Explore** tab and use the **Filter** options to locate content. You can also tap the Sort icon on the top right to quickly see Most Recent, Most Engaging, and Most Popular content from the Explore tab.

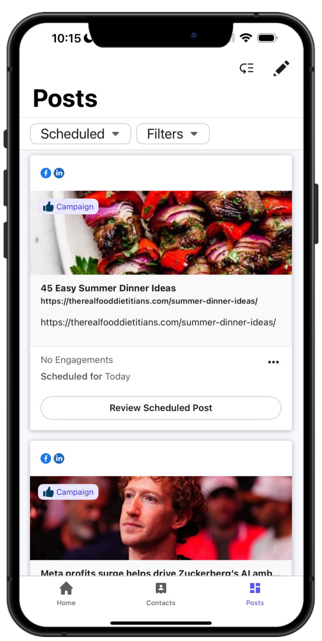


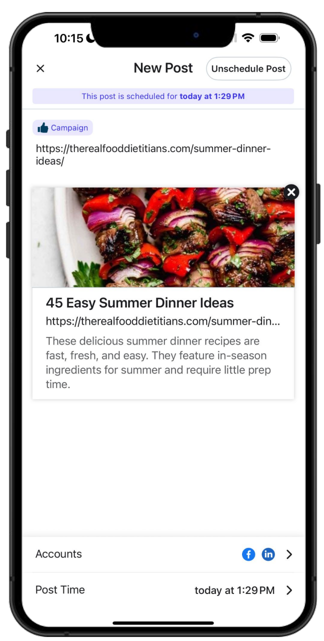




The third item in the dropdown menu is to view scheduled content. Tab **Scheduled > Apply**. This allows you to see the content and publish dates. You can use the Sort icon to sort by soonest scheduled. You have the option to review and edit scheduled content by tapping **Review Scheduled Post**. You can update the post settings or tap **Unschedule Post** in the top right to unschedule the post.

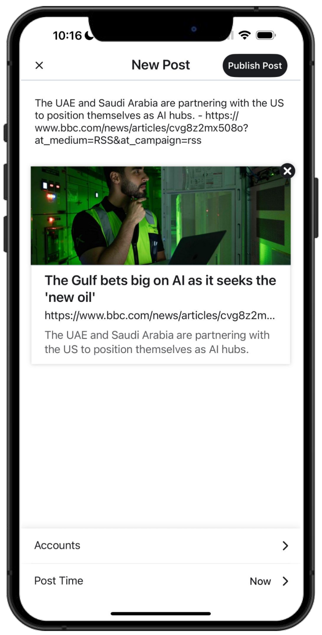


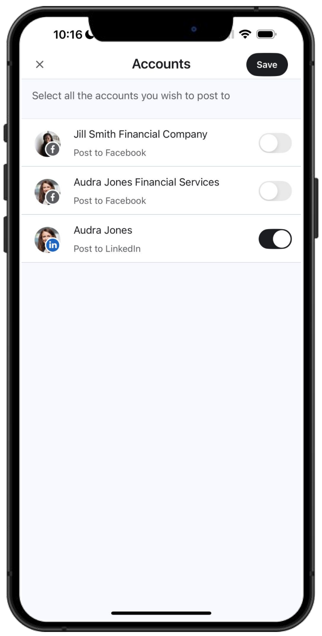


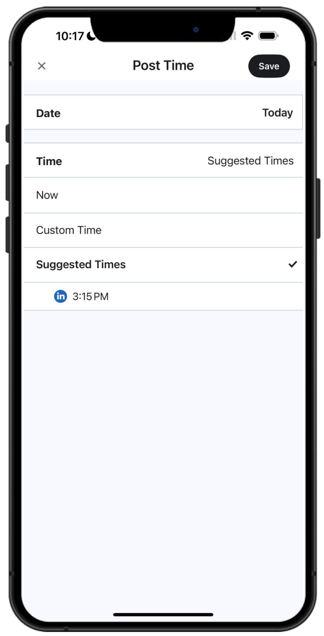


Publishing Content

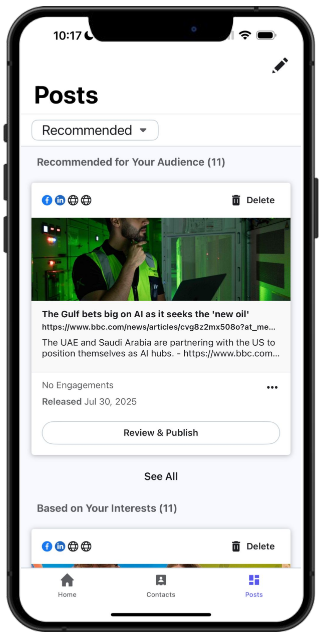
To publish suggested content from the Post Library, you will tap on one of the content cards. If your organization allows, you can modify the caption at the top. At the bottom of the screen, you have the option to select the accounts you want to publish to and the post time. When you tap on **Post Time,** you can publish **Now,** or choose a **Custom Time,** or use the **Suggested Times** for each network. Tap **Save** when complete.

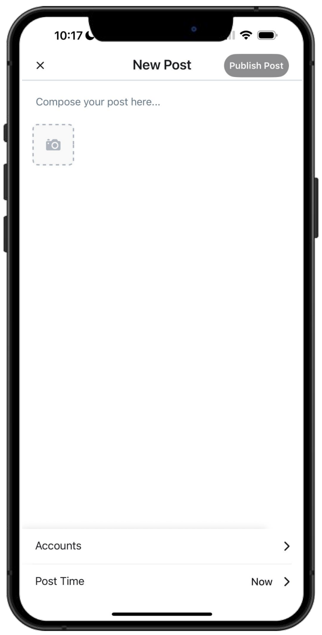


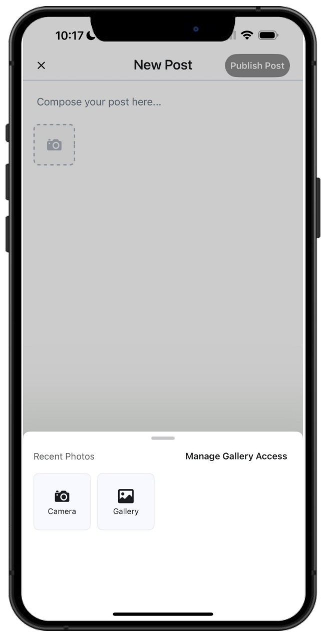


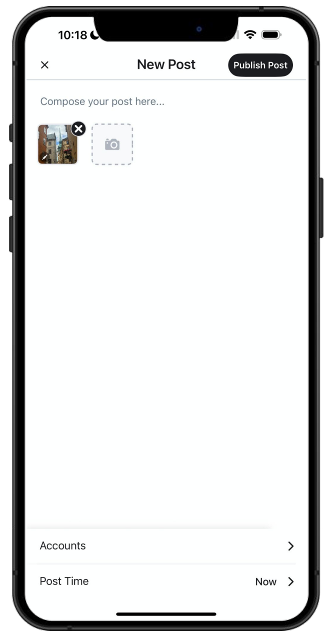


To publish original content, tap on the **pencil** icon at the top right. Just like on the web, you can add a website URL to create a summary card or you can upload your own images. If you upload an image or images. You can add your caption. Just like with suggested and modified content, you'll select **accounts** and **post time**. Depending on your organization settings, you may need to request approval before the content can be published. If not, you'll have the option to **Publish Post.**





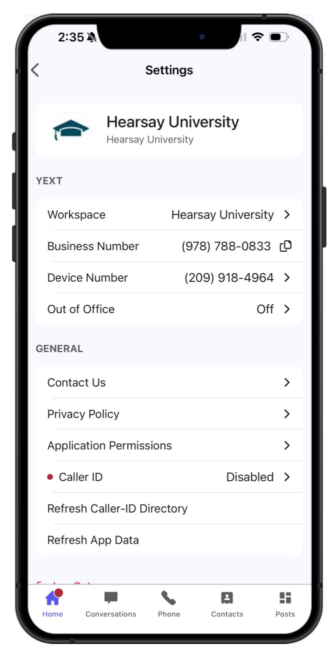




Settings

The **Settings** tab shows you information about your account. To access your settings, tap the gear icon at the top right of your home screen. You can find the following on this tab based on what your organization has enabled:

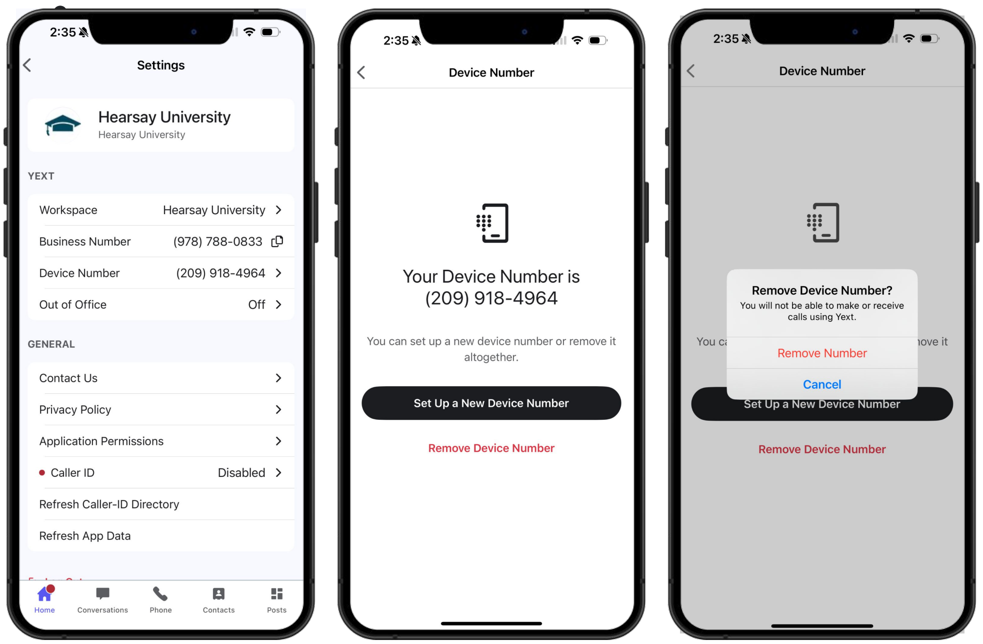
- **Workspace:** Your individual instance of Yext, which can only contain one Relate phone number at a time. If you have multiple Relate numbers, it is likely you have multiple workspaces.
    - To toggle between workspaces, tap **Workspace**.
    - Choose the desired workspace to swap to the associated Relate number.
- **Business Number:** This is the number you are currently using with your Relate account. This is the number your contacts see when you text them.
- **Device Number:** This is your cell phone number and enables you to use call/voice features.
- **Contact Us:** Enables you to send a message to Support.
- **Privacy Policy:** Redirects you to the Privacy Policy on the company's official website.
- **Application Permissions:** Redirects you to the applications you have granted access to.
- **Caller ID:** Enable or disable Caller ID for your contacts.



Edit or remove your device number

To edit or remove your device number:

- Go to your Settings click on the Device Number. This will open the next screen to set up a new device number or to remove the current device number.
- Click **Set Up a New Device Number** to update the connected mobile device number. This will initiate the same process as on page 16.
- Click **Remove Device Number** to completely remove the connected device number. If the number is successfully removed, you will receive a confirmation and the device number will now show an option to Add Phone Number. If it was not successful, you will see an error.



Permissions

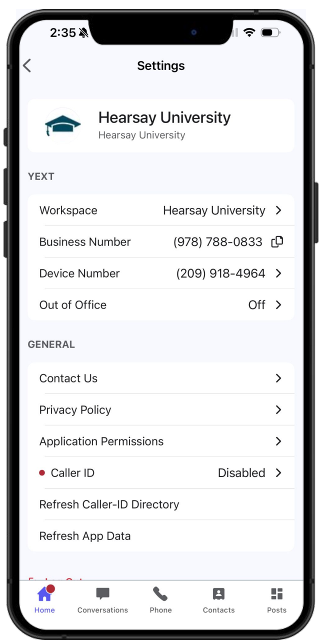
There are a number of different permissions in the Mobile app that will optimize your experience.

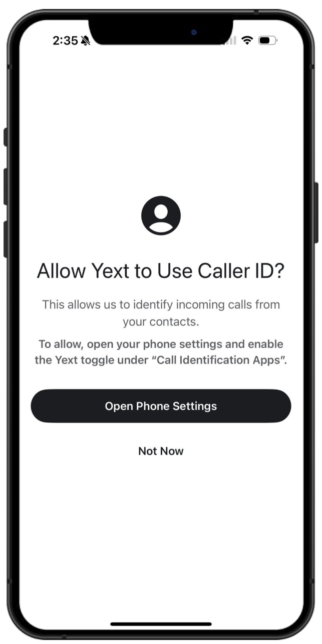
Caller ID

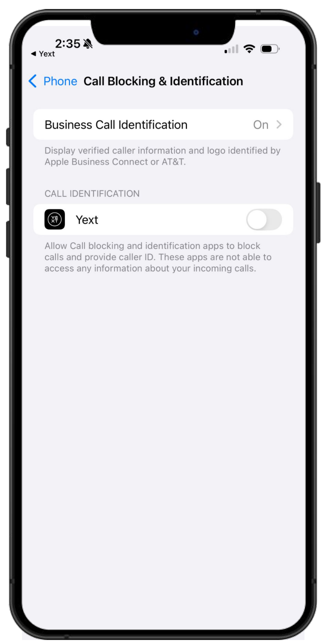
To enable Caller ID:

- Tap on the **Caller ID** item under **Settings**.
- This will need to open a pop-up to open your phone settings.
- The next screen will show your selection. If it isn't already green, toggle the slider to give the Mobile app permission to provide Caller ID.
- Go back to the Mobile app and you will see that Caller ID is enabled.

If you select Not Now, then you will be taken back to the Home tab. You can click on **Settings** at any time to trigger the prompt to open your phone settings.

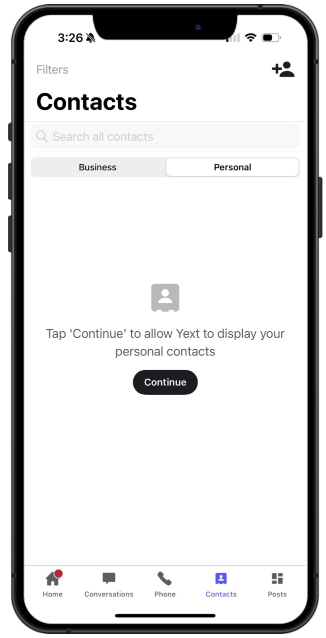






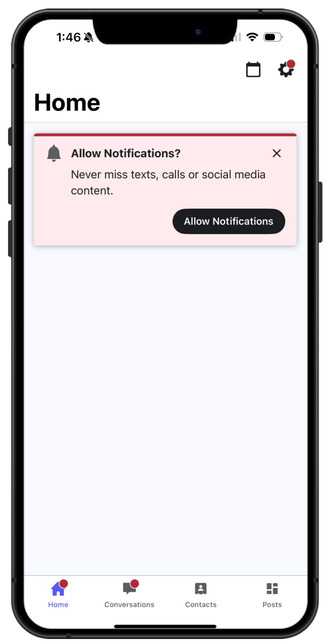
Contacts

When you tap on the **Contacts** tab, you will have the option to import all of your **Personal Contacts** on your device. Tap **Continue** to then select the contacts to import or to select all contacts. Ask your org for guidance if you're unsure about your compliance policy regarding personal contacts.



Notifications

You can enable notifications for the Mobile app so you'll receive alerts when there is new activity. If enabled, you will receive **Push** notifications on your mobile device's lock screen. An action card on the **Home** tab will prompt you to enable them if you have them turned off. This can be toggled off in your mobile phone's settings and notifications section.



Biometric & In-App PIN Security

To protect your account, Mobile adds a layer of security in the form of a PIN, fingerprint or facial identification. The registration of these characteristics is associated with your device only and is not stored by the Mobile app.

To unlock the application, the Mobile application will leverage the mobile device's preferred security method to provide nearly instant access to secure conversations.

There are two forms of security protection:
Biometric: This is a security process that relies on the unique biological characteristics of an individual to verify that person is a registered, approved user on the device to unlock an application.
In-App PIN: This is a code that is tied to an application on a specific device. For example, if you are using Mobile on two different devices and have In-App PIN enabled, each mobile device will have a different PIN code.

FAQs about Biometric & In-APP Pin Security:
Q: Can PIN and biometric security be combined?
A: Not at this time.

Q: If biometric fails, can a fallback be set to a PIN?
A: No, the agent/advisor needs to use biometric to unlock the application. Otherwise, they will need to log in to the app with credentials.

Q: Where is a user's biometric data stored?
A: Biometric data is not stored by Yext. The biometric data is stored on the device. The advisor's own device validates whether or not the biometric scan matches what it has recorded (whether it is fingerprint or FaceID). If the scan matches, it returns a Yes, and the application unlocks; if it returns a no, the application does not unlock. If the biometric unlocking fails the maximum number of times (3 times on iOS, 5 times on Android), the user will need to log in to Yext via email.

Biometric
If your organization enables biometric, upon opening the Mobile app, you will be prompted to secure your biometric recognition. Users will need to grant permission for FaceID or TouchID (depending on their device model).

When an inactivity timeout occurs and the Mobile application is re-opened, you will be prompted to unlock the application using the biometric method available on your device.

In-app PIN
If your organization enables In-app PIN, you will be asked to set it up on your iOS or Android device the next time you launch the Mobile application.

You will need to set a 4-digit PIN that you will use to unlock the application which must be entered twice to set.

When an inactivity timeout occurs, you will be prompted to unlock the application using the 4-digit PIN that you set.

If the mobile login fails, you will have to log in via email and reset their 4-digit PIN. You will not be able to use your previously used PINs.

If the phone does not have biometric capabilities (older Android devices, for example), PIN or pattern will be used to unlock the Mobile application.