



Real Estate Platform ("REP") Overview



Part 1

1. Access/Login REP Portal
2. Agent Dashboard
3. Creation of a Quality Profile
4. Managing Contacts
5. Buyer Profiles

Part 2

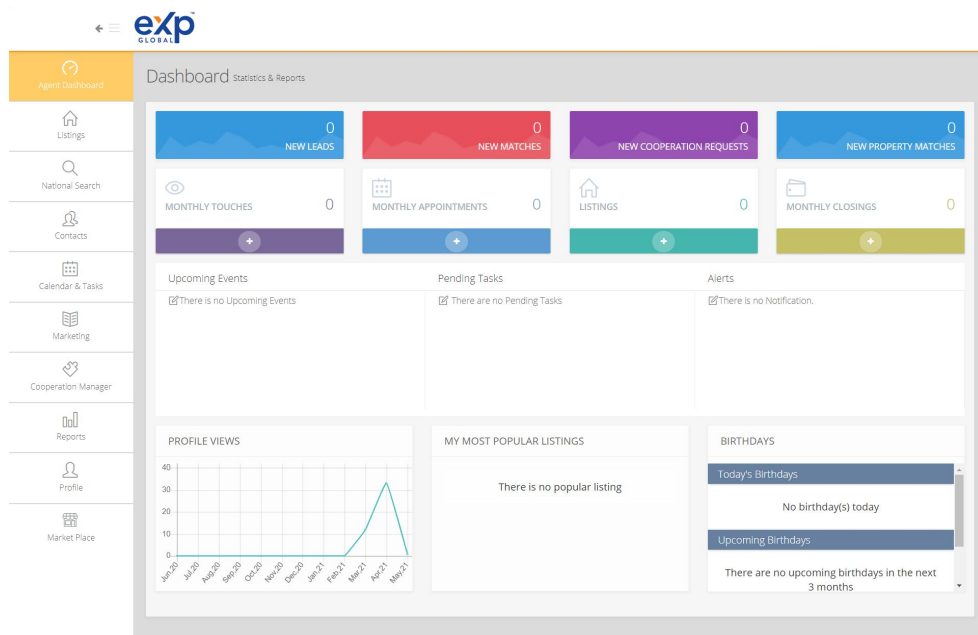
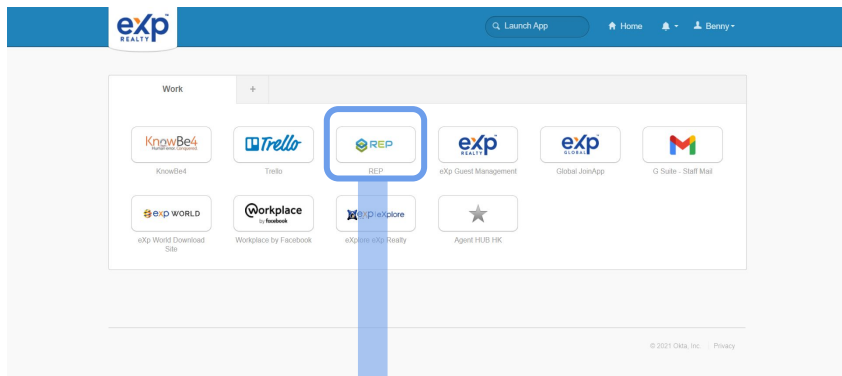
6. Manage Property Listing
7. Calendar & Tasks
8. Marketing

Part 1

Introduction to 'REP'

1. Login REP Portal

Tips: Click 'Setting' Icon > go to 'General' Tab > select 'Auto-launch' > SAVE



1. Accessing REP

- Can be a bit tricky until you get the hang of it.
- Access REP by using your eXpRealty Okta account.
- Log into REP using 'Login with Passport'.

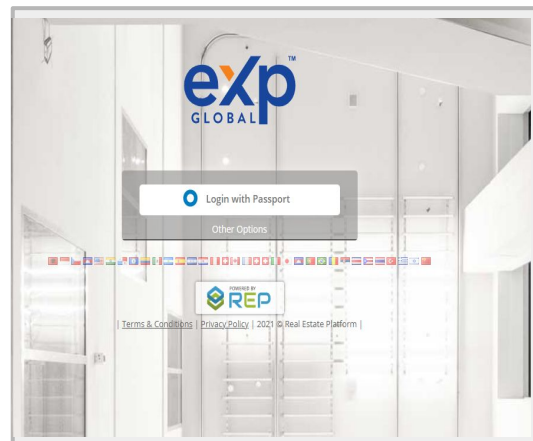
Pay attention to the email format!

Example:

firstname.lastname@countryspecificwebaddress.com

Note:

- **In your Team Google Drive, there is a 'REP' Folder.**
- **Here you will find the 'REP Manual' that goes through the platform.**
- **Please reference and familiarize yourself with the REP Manual.**



2. Agent Dashboard (Statistics & Reports)

- 1. Main Menu (Left Panel)**
 - a. Click** ← to expand or shrink
- 2. New leads**
 - visitors filled out a contact form with details
- 3. New Matches**
 - Properties match what your buyers want
- 4. New Co-Operation Requests**
 - co-operation requests waiting response
- 5. New Property Matches**
 - buyers interested in an agent's property
- 6. Monthly Touches**
 - measures agent communicate with a client
- 7. Monthly Appointments**
 - appointments an agent has this month
- 8. Listings**
 - open own listings and add a new one
- 9. Monthly Closings**
 - deals completed this month (Sold & Rentals)
- 10. Graphs & Notifications**
 - Upcoming Events, Pending Tasks, Alerts, PROFILE VIEWS, POPULAR LISTINGS, Birthdays

The screenshot displays the Agent Dashboard interface. On the left is a main menu with icons for Agent Dashboard, Listings, National Search, Contacts, Calendar & Tasks, Marketing, Cooperation Manager, Reports, Profile, and Market Place. The main dashboard area is titled "Dashboard Statistics & Reports" and features several key metrics:

- 2** NEW LEADS
- 3** NEW MATCHES
- 4** NEW CO-OPERATION REQUESTS
- 5** NEW PROPERTY MATCHES
- 6** MONTHLY TOUCHES
- 7** MONTHLY APPOINTMENTS
- 8** LISTINGS
- 9** MONTHLY CLOSINGS

Below these metrics are three notification boxes:

- Upcoming Events:** There is no Upcoming Events.
- Pending Tasks:** There are no Pending Tasks.
- Alerts:** There is no Notification.

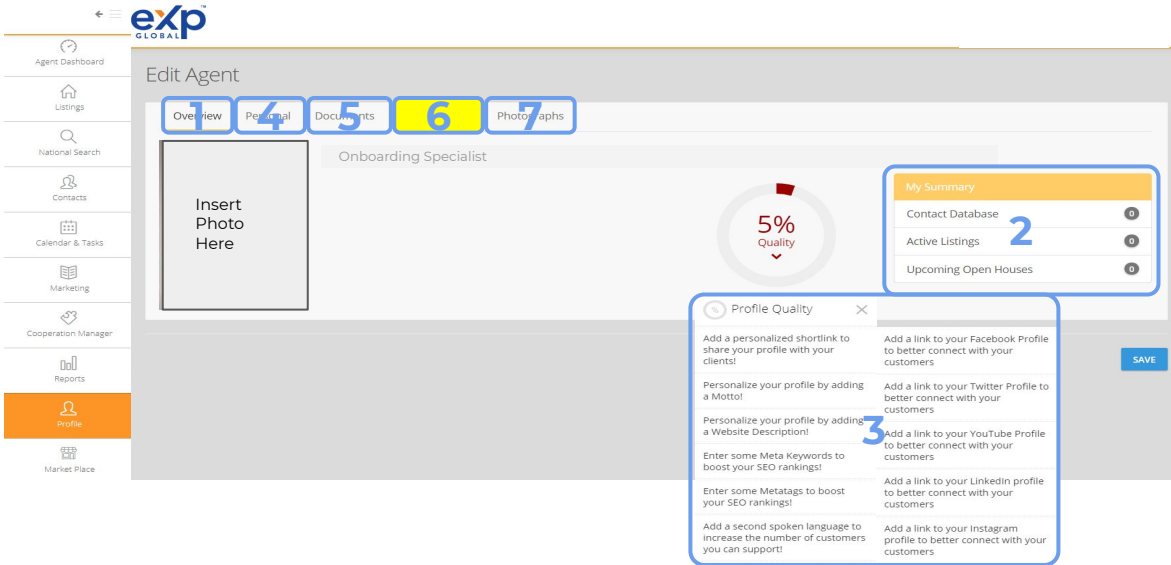
At the bottom, there are three sections:

- PROFILE VIEWS:** A line graph showing profile views from Jun'20 to May'21. The y-axis ranges from 0 to 40. The data shows a sharp increase starting in Feb'21, peaking at approximately 35 in Apr'21.
- MY MOST POPULAR LISTING:** There is no popular listing.
- BIRTHDAYS:** Today's Birthdays: No birthday(s) today. Upcoming Birthdays: There are no upcoming birthdays in the next 3 months.

Part 1

Creating Profiles

3. Creation of a Quality 'Profile'



1. Overview

- a. Display of Photos, Name and Website Description

2. My Summary

- a. List & Click: Contact DB, Active Listings & upcoming Open houses

3. Profile Quality

- a. Improving 'Profile Quality' % by completing the Item listed

4. Personal

- a. Edit/Update details, communications, Languages Spoken & Specializations, Contact Categories, and Marketing & SEO

5. Documents

- a. Upload Documents for clients

6. Manage Agent

- a. Enable Listing Quality Assurance

7. Photographs

- a. Import Profile Photo
- b. Marketing Logo

Don't forget to 'SAVE'

Part 1

Creating Profiles - Contacts & Buyers

4.1. Manage Contacts - Landing Page

- 1. Contact Categories**
 - Indicate #of contacts in assigned categories
- 2. Search Bar and Star rating**
 - Refine search by name and star ratings
 - Click 'Select all' to 'Send Marketing Email' or 'Delete Contact'
- 3. View Contact**
 - Click on individual Contact to go to contact detail page
- 4. Contact Tools**
 - Contact Import
 - Contact Export
 - Manage Categories
- 5. Create New Contact**

The screenshot shows the 'Manage your contacts' interface. On the left is a navigation sidebar with icons for Agent Dashboard, Listings, National Search, Contacts (highlighted), Calendar & Tasks, Marketing, Cooperation Manager, Reports, Profile, and Market Place. The main content area has a header with 'Contacts Manage your contacts' and a '+ CREATE NEW CONTACT' button (5). Below the header are three filter boxes for 'BUYER', 'LANDLORD', and 'SELLER'. A search bar (2) contains a search icon, a star rating filter, and 'CLEAR' and 'SELECT ALL' buttons. A table shows '1 Contacts Selected' with columns for Contact Name, Rating, Email, Phone Number, and Last Activity. The table contains one row for 'Owner Property' with a 5-star rating and email 'owner@property.com'. Below the table is a 'CONTACT TOOLS' section (4) with three cards: 'Contact Import' (Download the template and fill it in to import your Contacts), 'Contact Export' (Export your Contacts to Excel), and 'Manage Categories' (Manage your contacts categories by adding or removing one or more Contacts from a category). At the bottom right are 'DELETE CONTACTS' and 'SEND MARKETING EMAIL' buttons (1).

4.2. Manage Contacts - Overview

Agent Dashboard

Lists

National Search

Contacts

Calendar & Tasks

Marketing

Cooperation Manager

Reports

Profile

Market Place

exp GLOBAL

Edit Contact - James Perry - 59082-7856211

Overview | Contact Details | Properties | Photographs | Documents | Buyer Profile | Activities | Marketing

James Perry

owner@property.com
Mobile Phone: 94822047

Buyer/Seller/Landlord
Added: 04/09/2021 | Last Modified: 04/09/2021

1

2

3

4

5

He is a contact of an owner

Open House
Schedule an Open House for this contact

Property Viewing
Schedule a property showing for a contact

Upcoming Events

Follow up
Add a Follow Up activity for this contact

Contact Task
Create a Task for this Contact

ADD LISTING | ADD BUYER PROFILE | START NEW COOPERATION REQUEST

CANCEL | SAVE

1. Contact Key Details

- a. Overview of key contact information

2. Rating

- a. A star rating (Stars are filled in yellow if a rating exists)

3. Action Key/tools

- a. Open House: Schedule an Open House for this contact
- b. Property Viewing: Schedule a property showing for a contact
- c. Follow up: Add a Follow Up activity for this contact
- d. Contact Task: Create a Task for this Contact

4. Notes

- a. About your contact (these are in the Contact Details tab as well)

5. Events

- a. Upcoming event linked to this contact

4.3. Manage Contacts - Contact Details #1-2

1. Contact Information

- a. Name, company, marital status, children
- b. Date of birth (with optional birthday reminders and default birthday marketing template for sending a virtual card) and, gender
- c. Preferred language (the language all system generated correspondence like Buyer Profiles, will be sent)
- d. Office Public Contact: contact will be visible to all agents in this office
- e. Team Contact: make this contact visible to team members only

2. Communications

- a. Email, phone numbers, address, and preferred communication method
- b. This will show on the overview tab for the contact

4.3. Manage Contacts - Contact Details #3-5

3. Leads Status

- a. Star Rating
- b. Lead Source
- c. Lead Status
- d. Grouping

4. Social Media Links

- a. Facebook
- b. Youtube
- c. Instagrams
- d. Twitter
- e. LinkedIn

5. Notes

- a. Agent Notes (shown on Contact Overview)
- b. Leads Notes

Don't forget to 'SAVE'

4.4. Manage Contacts - Properties & Photographs

1. Properties

- a. Connect contact to properties; indicating if the contact has any listings or has submitted a lead for any listings on the national website.
- b. Click 'Add Listing' to add a listing directly


2. Photographs

- a. Upload Contact's photo
- b. Provide same editing capabilities as the listing photo editor

Edit Contact - James Perry - 59082-7855211

Overview Contact Details **Properties** Photographs Documents Buyer Profile Activities Marketing

Owned Properties ADD LISTING

 **VIEW PROPERTY**

HK\$ 3,600,000
Tsim Sha Tsui
Condo-Apartment - For Sale
Exclusive offer

7017001-8 **ACTIVE**
LISTING DATE : MAY 3, 2021
LAST UPDATED : MAY 4, 2021

Properties Interested In

This contact has not submitted any contact requests for your properties yet.

Overview Contact Details Properties **Photographs** Documents Buyer Profile Activities Marketing

Images should be in portrait orientation and at least 500 pixels tall. Valid image types are png, jpg and jpeg

Insert Photo Here

Drag and drop files here or click Browse to select

BROWSE

4.5. Manage Contacts - Documents & Activities

Overview Contact Details Properties Photographs **Documents** Buyer Profile Activities Marketing

Upload Documents

0%

Upload Queue

File Name	Document Type	Description
SSSB_CoverP18	PROPERTY BROCHURE	SSSB_CoverP18

Overview Contact Details Properties Photographs Documents Buyer Profile **Activities** Marketing

My Activities

This is a list of all the activities you have done with your client.

SUBJECT	TYPE	DATE	TIME	LISTINGS
There are no activities for this client.				

Buyer Profile Emails

This is a list of all emails sent to this client.

SUBJECT	DATE	STATUS	LISTINGS SENT	LISTINGS VIEWED
There is no email sent for this client.				

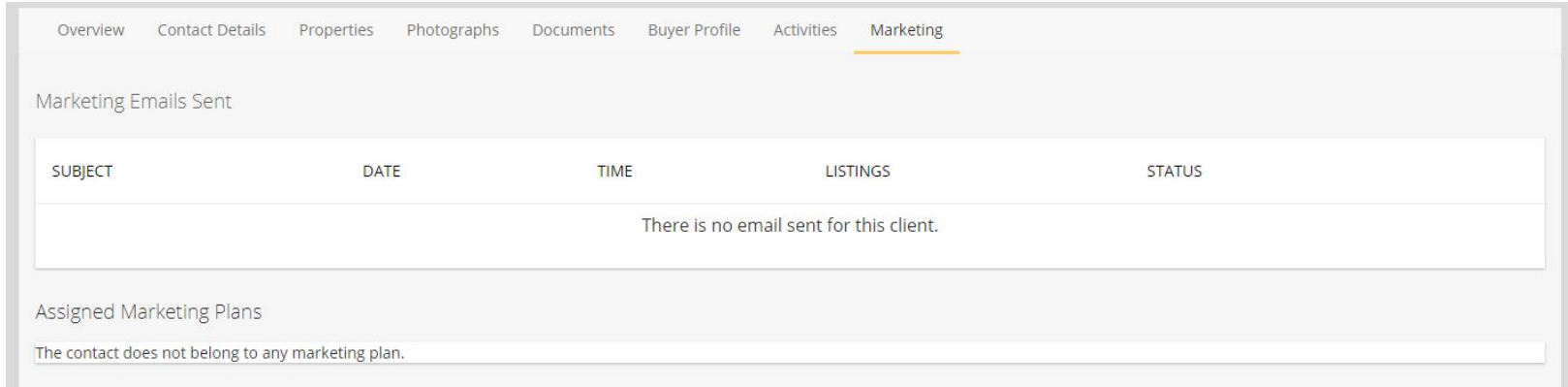
1. Documents

- Upload any relevant documents
- Credit reports, scans of identification to a contact record

2. Activities

- My Activities:** upcoming activities connected to this client
- Buyer Profile Emails:** emails that have been sent to the client
- Export Activities:** will export all your activities for the client into an Excel

4.6. Manage Contacts - Marketing



Overview Contact Details Properties Photographs Documents Buyer Profile Activities **Marketing**

Marketing Emails Sent

SUBJECT	DATE	TIME	LISTINGS	STATUS
There is no email sent for this client.				

Assigned Marketing Plans

The contact does not belong to any marketing plan.

Marketing

show you any marketing emails that have been sent to this contact and any assigned marketing plans.

You can select the down arrow on the marketing plan to see which steps have been completed.

5.1 Buyer Profile - #1-4



Automatically send relevant listings to your buyers.
They exist as a submenu in the Contacts section and as a tab on relevant contacts

1. Profile Name & Note

- a. **Notes** is private but the Profile Name will be viewable by other agents

2. Auto-email matching Properties

- a. Checkbox indicates if the Buyer Profile will be sent Automatically or Manually (through you first).
- b. When initially configured the first Buyer Profile must be sent manually even if this box is checked

3. Expiry Date

- a. The date will expire and stop sending this client listings
- b. Notification will be sent before expiry date
- c. 'Renew' button will be appear accordingly

4. Summary

- a. Details of Buyer Profile on creation date, the number of matches, emails sent, and current status

The screenshot shows the 'Buyer Profile' configuration page. At the top, there are navigation tabs: Overview, Contact Details, Properties, Photographs, Documents, Buyer Profile (selected), Activities, and Marketing. Below the tabs, a message reads: 'Send relevant Listings to your Contacts by creating Buyer Profiles.'

Callout 1: A blue box highlights the 'Profile Name' section. It contains a text input field with 'Requirement May 2021', a note below it stating 'Note: The name used here will be shown to other Agents', and a 'Notes' section with the text 'Testing water'.

Callout 2: A green box highlights a checkbox labeled 'Automatically email matching properties to your client.' which is checked, and an unchecked checkbox labeled 'First Time Buyer'.

Callout 3: A green box highlights the 'Expiry Date' field, which is set to 'Oct 31, 2021'.

Callout 4: A blue box highlights a summary panel on the right side of the page. It contains the following information: Status: Active; Matching: 0; New: 0; Matches Sent: 0; Email Sent Count: 0; Date Added: May 4, 2021.

At the bottom of the form, there are four dropdown menus: 'Motivation' (set to INVESTMENT), 'Time Frame' (set to < 1 MONTH), 'Marital Status' (set to MARRIED), and 'Children' (set to 2).

5.2 Buyer Profile - #5-7



Motivation: INVESTMENT | Time Frame: < 1 MONTH | Marital Status: MARRIED | Children: 2

1 What Type? For Sale, Residential

2 Where? Hong Kong (general)

3 How Much? HK\$3,000,000 - HK\$4,000,000

4 Details? Condo-Apartment, Detached House

5

6

7

Matching Properties: 0

ACTIVE | NOT SELECTED | All: 0 | New: 0 | Favourites: 0 | Removed: 0

No Properties Found

ADD LISTING | ADD BUYER PROFILE | START NEW COOPERATION REQUEST | CANCEL | SAVE

5. Client Intention

- a. Motivation
- b. Time Frame
- c. Marital Status
- d. Children

6. Client Preferences

- a. Click 'Edit/View' to modify on:
- b. What Type?
- c. Where?
- d. How Much?
- e. Details

7. Matching Properties

- a. show you all the current and past matches, allowing you to filter and sort the list
- b. if you have chosen to send the properties manually above, this is where you would go to select the properties you will send to the client by selecting the checkbox and the Email button

Part 2

Managing Property Listings

6.1. Manage Property Listing- Landing Page

1. Search Listings Option

- Listings Status - select dropdown list
- Keyword OR Listings ID
- Advanced Filters: Contract Type, Transaction Type, Market Segment, and/or listing prices

2. Create New Listing*

- Pop-up window to start create New Listing
- Edit Transaction Type and Market Segment

*Create Listing procedure will be explained in the rest of this section.

3. Listing Views

- Gallery View & List View are available
- Selection of number of Items Per Page

4. Export Listing

- One click export to PDF based on search result

6.2. Manage Property Listing- Overview

1. Statistics

- a. Days: on Market / Region Average
- b. Impression: reach
- c. Views: actual click to view
- d. Leads
- e. Conversion Rate

2. Basic Information of the Listing

- a. Cover Photo
- b. Price
- c. Type / Status

3. Action Key/Tools

- a. Virtual Open House: Schedule an online open house
- b. Virtual Property Viewing: Schedule an online property viewing
- c. Open House: Schedule an Open House for this Listing
- d. Property Viewing: Schedule a property showing for a Contact
- e. Follow up: Add a Follow Up Activity for this Listing
- f. Listing Task: Create a new Task for this Listing

The screenshot shows the 'Edit Listings' interface for a residential property. The top navigation bar includes 'Overview', 'Listing Details', 'Media', 'Activities', 'Leads & Contacts', 'Property Match', and 'Documents'. The main content area is divided into several sections:

- Statistics:** A bar chart showing 'DAYS ON MARKET 0' and 'REGIONAL AVERAGE 0'. Below it are four bars representing 'IMPRESSIONS 0', 'VIEWS 0', 'LEADS 0', and 'CONVERSION RATE 0%'.
- Cover Photo:** A large image of a modern kitchen with a large blue number '2' overlaid on it.
- Actions:** A grid of buttons for scheduling various activities: 'Virtual Open House', 'Virtual Property Viewing', 'Open House', 'Property Viewing', 'Follow up', and 'Listing Task'. A large green number '3' is overlaid on the 'Property Viewing' button.

At the bottom, there are buttons for 'GENERATE LISTING PDF', 'CANCEL', 'SAVE DRAFT', and 'SAVE AND MAKE ACTIVE'.

6.3. Manage Property Listing - Listing Details #1-5

1. Basic Information

- a. Can not re-edit for SALES or RENT, because this info measure how long the property is listed in the market on your website
- b. Click 'Copy Listing', if change is required and set inactive for the current one
- c. Tick 'Hide on Website, if the client is not ready yet

2. Price & Additional Cost & Fee

- a. set the listing price, type, and any service charges as well as their timeframe. *(Do NOT recommend to hide price.)*
- b. Set Additional Fees for visitors to view

3. Commission Details

- a. Strictly for agents viewing the listing on the REP site
- b. And other agents can use this information when creating co-operation requests to share with the listing agent.

4. Property Details

- a. Setting of Property Type, Marketing Status, Date available, Property Status, Classification, and Year/Month Built.
- b. Set Sizes and Floors
- c. Set total Rooms and distribution of rooms

Agent Dashboard

exp GLOBAL

← exp GLOBAL

Agent Dashboard

Listings

National Search

Contacts

Calendar & Tasks

Marketing

Cooperation Manager

Reports

Profile

Market Place

Edit Listings Residential - For Sale - 7017001-8

VIEW ON WEBSITE SHARE LISTING

Overview Listing Details Media Activities Leads & Contacts Property Match Documents

For Sale For Rent Residential Commercial Land

STR # RERA Permit - Digital RERA Permit - Print

Listing Status Contract Type Original Listing Date Expiry Date

DRAFT NOT SELECTED May 3, 2021 Aug 1, 2021

Price and Additional Costs

Listing Price Price Type TAX Included

0.00 HK\$ NOT SELECTED 0% Hide Price

Service Charges Service Charges Timeframe

0.00 HK\$ NOT SELECTED

Additional Fees

ADD ADDITIONAL FEE

Commission Details

Listing Commission Selling Commission

0 % Percentage Amount 0 % Percentage Amount

Property Details

Property Type Market Status Date Available

NOT SELECTED NOT SELECTED

Property Status Property Classification Month/Year Built

NOT SELECTED NOT SELECTED

Parking Spaces Floors

0 0

Living Area Cubic Volume

0 ft² 0 ft³

Plot Size Lot Dimensions

0 ft² 0 x 0 ft

BUA

0 ft²

Rooms

Total Rooms Living Rooms Bedrooms Bathrooms Toilets Suites

0 0 0 0 0 0

1

2

3

4

22

6.3. Manage Property Listing - Listing Details #5-6

5. Location

- Option to 'Show Full Address on Website' checkbox
- Option to 'GET COORDINATE' show the area instead
- While you may want to do this in most cases, it may not be a good idea to show the full address for an open listing

6. Listing Descriptions

- This is the most **'IMPORTANT PART OF LISTINGS'**
More information = Better listing = View longevity
- Start with **Motto**, headline to grab the visitor's attention
- Description:** e.g. Parks, schools, restaurants, transit, attractions, neighbourhoods, and even historical background
- Marketing & Mobile Description:** Text entered will display on Listing Brochures

6.3. Manage Property Listing - Listing Details #7-11

7. Listing Features

- Tick basic features
- Click 'show more' for more features

8. Room Details Option

- Allow to add further description on each room
- **The added 'room(s)' can be associated with the 'Media/Images'

9. Notes

- Agent Notes: view by other agent when visiting the listing
- Private Notes: view by yourself only

10. Owner(s)

- Attach the Owner of the listing
- Option to 'CREATE NEW OWNER CONTACT' on a fly

11. Generate List, SAVE & Publish

- Click and generate a PDF
- 'Save Draft' for further edit later
- 'Save and make active' where the portal will notify if there are fields missing before making the listing active

The screenshot displays the 'Listing Details' form in the Exp Global system. The form is divided into several sections, each highlighted with a colored box and a numbered callout:

- Listing Features (7):** A section with a dropdown arrow and a 'show more' link. It contains checkboxes for Swimming Pool, Garden, Garage, Storage Room, Lift-elevator, Furnished, Country Side, and Air Conditioning.
- Room Details Option (8):** A section with an 'ADD ROOMS' button.
- Notes (9):** A section with two text areas: 'Agent Notes' and 'Private Notes'.
- Owner(s) (10):** A section with a search input field and a 'CREATE NEW OWNER CONTACT' button.
- Bottom Bar (11):** A section with three buttons: 'GENERATE LISTING PDF', 'CANCEL', and 'SAVE DRAFT'. A 'SAVE AND MAKE ACTIVE' button is also visible.

A sidebar on the left contains navigation icons for Agent Dashboard, Listings, National Search, Contacts, Calendar & Tasks, Marketing, Cooperation Manager, Reports, Profile, and Market Place.

6.4. Manage Property Listing - Media

4 Photos
Drag and drop to change the sort order of the images below

Mouse over for more tools

Drag and drop files here or click Browse to select.

BROWSE

ADD 360° IMAGES ADD PANO IMAGES

YouTube Link
Enter a link to a video on YouTube that is related to the listing.

Virtual Tour Link
Add a Link to a Virtual Tour

External Link
Add a Link to Another Website

GENERATE LISTING PDF

CANCEL SAVE DRAFT SAVE AND MAKE ACTIVE

Edit Image

USE ORIGINAL

CANCEL

Use Star

Associate Room

NOT SELECTED

NOT SELECTED

Living Room

Dining Room

Bedroom

CANCEL

Use Star

5. Adding Photos

- Image size: recommend 1280x600 as a minimum, large files will increase the time it takes to load
- Browse your Computer or simply drag and drop photo
- Add 360° Images
- Add Pano Images
- Order of Photos: simply Drag photo into different order

6. Resizing Photos/Cropping

- Guideline is available to crop the image in right size

7. Associate Rooms

- Select the rooms you have added on the 'Listing Details' > 'Room Details Option' section

8. Rotate Images

- Simply click and rotate images to your liking

9. Star Image

- Set cover photo by click the 'star' icon

10. Add Links

- YouTube Link
- Virtual Tour Link
- External Link

6.5. Manage Property Listing - Activities

An option to record any activities completed for a property.

- ❖ Show clients all activities selling a property in case of a dispute
- ❖ Track activities to determine the most effective in getting leads

Based on activities completed, and decide next actions to take:

- ❖ Reach out to client on adjusting the prices
- ❖ Taking it off the market temporarily or other option

1. Export Activities

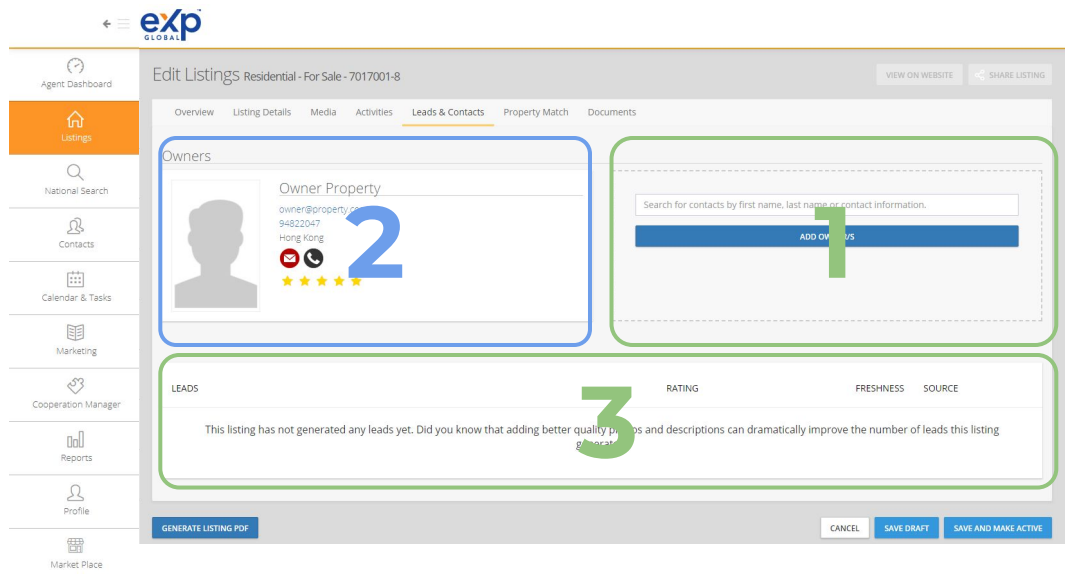
- a. Download all your activities in a single PDF

2. Add Activities

- a. Add a record of an upcoming activity
- b. Option to select type of activity

The screenshot displays the 'Edit Listings' interface for a residential property (7017001-8). The 'Activities' tab is active, showing a table with columns for SUBJECT, TYPE, DATE, TIME, and CONTACTS. The table is currently empty, and a blue 'ADD ACTIVITY' button is highlighted with a green box. Below the table, there are sections for 'Other Activities' and 'AGENT & OFFICE', both of which are also empty. A modal window titled 'Add Event' is open, showing a dropdown menu for activity types (with 'Not Selected' chosen), an 'Event Title...' field, and an 'Event Description...' field. Below these fields, there is a calendar and time slot selection interface. The 'Start Date' is set to May 4, 2021, and the time slot is 15:30. The 'Listings(s)' field shows '7017001-8 - N/A N/A'. The modal has 'CANCEL' and 'SAVE' buttons.

6.6. Manage Property Listing - Leads & Contacts



1. Add individual contacts.

- Input Name of Owner
- Click 'Add Owner'
- Alternatively, Add or create new Owner in 'Listing details' > 'Owner(s)' section

2. Owner information

- Photo
- Name of Owner
- Contact information
- Address

3. Leads

- List of leads will be automatically populate here

6.7. Manage Property Listing - Property Match

Property matches occur when a property you have listed matches a buyer match profile created by another agent.

It is a POWERFUL tool to be used in every opportunity or listing in order to get property SOLD more quickly and allow the region to profit.

1. Agent Dashboard

- a. Number of Property match available

2. Property Match

- a. Click and search for closest matching

3. View Matches

- a. allow the user to see the names of the contacts who have buyer matches that include this property

4. Start Cooperation Request

- a. able to contact the potential buyer of the property

5. View Profile

- a. view the agent's profile and properties

The screenshot displays the 'Property Match' section of the exp GLOBAL system. At the top, it shows 'Edit Listings Residential - For Sale - 7017001-8' with an 'Approved' status and 'VIEW ON WEBSITE' and 'SHARE LISTING' buttons. Below this is a navigation menu with 'Property Match' selected. The main content area is titled 'Property Match' and includes a sub-header: 'The Property Match feature matches your Listing to all the Buyer Profiles created by other Agents. The Agents below have potential buyers for your listing!'. A table lists agents with their profiles and match counts:

Agent Profile	VIEW MATCHES	START COOPERATION REQ...	VIEW PROFILE
Kingly Choi EXP Hong Kong kingly.choi@exp.hk.hk 8 (529) 808-9060 Matching Buyers (1)	3	4	5

At the bottom of the interface, there is a 'GENERATE LISTING PDF' button on the left and 'COPY LISTING', 'CANCEL', and 'SAVE' buttons on the right. A pagination control shows 'Previous 1 Next'.

6.8. Manage Property Listing - Documents

The screenshot shows the 'Edit Listings' interface for a residential property. The 'Documents' tab is active, displaying two sections: 'Private' and 'Public'. The 'Private' section is highlighted with a blue border and a large blue '1'. It features an 'Upload Documents' area with a 'BROWSE' button, a progress indicator at 0%, and an 'Upload Queue' table. The table has columns for File Name, Document Type, Description, and Permission. A row shows '2021 eCommerce Strategy Handbook', '.PDF', 'OTHER', 'Handbook', and 'PRIVATE'. The 'Public' section is highlighted with a green border and a large green '2'. It also has an 'Upload Documents' area with a 'BROWSE' button, a progress indicator at 0%, and an 'Upload Queue' table. A row shows 'SSSB_CoverP18', '.PDF', 'PROPERTY BROCHURE', '售楼書 PDF', and 'PUBLIC'. At the bottom of the interface, there are buttons for 'GENERATE LISTING PDF', 'CANCEL', 'SAVE DRAFT', and 'SAVE AND MAKE ACTIVE'.

1. Private section

- a. Not be visible to other agents in REP who are viewing the listing.
- b. These would include any documentation on commission or sales agreements.

2. Public section

- a. allows the user to upload documentation that can be seen by all agents.
- b. This can include floor plans, area descriptions or any other information that agents would like buyers to know.

Part 2

Manage Calendars & Tasks

7. Calendar & Tasks - Calendar

Create events linking them to contacts and properties and via versa

1. Calendar Views

- a. Today
- b. Month
- c. Week
- d. Day

2. Create/New Event from Calendar

- a. Select Event Type from dropdown list
- b. Edit Title and Description
- c. Set Date & Time
- d. Click 'Add Event' button to save

3. Create Event from Listings

- a. Go to: Listings > Overview > Action Tools

4. Create Event from Contacts

- a. Go to: Contacts Overview > Action Tools

The screenshot displays the exp GLOBAL Calendar interface. On the left is a navigation sidebar with icons for Agent Dashboard, Listings, National Search, Contacts, Calendar & Tasks (highlighted in orange), Marketing, Cooperation Manager, Reports, Profile, and Market Place. The main area is titled 'Calendar' and shows a calendar for May 2021. A 'NEW EVENT' form is overlaid on the calendar, with a green box around it labeled '2'. The form includes a dropdown menu for event type (highlighted with a red box and labeled '1'), fields for Event Title, Event Description, All Day checkbox, Listing(s), Contact(s), and Event Location. Below the form are 'ADD EVENT' and 'CANCEL' buttons. A second dropdown menu is shown below the form, also with a red box and labeled '4', listing various event types such as Appointment, Call, Open House, Property Viewing, Home Inspection, Other, Follow-Up, Training, Virtual Open House, and Virtual Viewing. On the right, the calendar grid shows dates from 1 to 31. A blue box labeled '3' highlights a grid of event creation options for May 21st, including Virtual Open House, Virtual Property Viewing, Open House, Property Viewing, Follow up, and Listing Task. A second blue box labeled '4' highlights a similar grid of options for May 22nd, including Open House, Property Viewing, Follow up, and Contact Task. A red arrow points from the '1' dropdown to the '4' dropdown.

7. Calendar & Tasks - Tasks



The screenshot displays the 'Tasks' management interface. At the top, there are search filters for Subject, Due date, and Priority. Below this is a table of tasks with columns for Completed, Priority, Subject, Due Date, Reminder Date, Listings, and Contacts. A task titled 'Call James to confirm' is highlighted. To the right, a 'Create New Task' dialog is open, showing fields for Due date, Reminder date, Priority, Listing(s), and Contact(s). The dialog also includes a text area for the task description and 'CANCEL' and 'SAVE' buttons. Numbered callouts (1-5) highlight key features: 1. Search filters, 2. Task list table, 3. 'Add new task' dialog, 4. 'Add new task' buttons, and 5. 'Create Task from Listings' and 'Create Task from Contacts' buttons.

Completed	Priority	Subject	Due Date	Reminder Date	Listings	Contacts
<input type="checkbox"/>	High	Call James to confirm	2021-05-07	2021-05-07	7017001-8	James.Perry
<input type="checkbox"/>	Medium	High Priority	2021-05-07	2021-05-07	7017001-8	James.Perry
<input type="checkbox"/>	High	Call James to confirm	2021-05-08	2021-05-08	7017001-8	James.Perry
<input type="checkbox"/>	Low	LOW Priority	2021-05-09	2021-05-09	7017001-8	James.Perry

Create tasks linking them to contacts and properties and via versa

Unlike Events, ONLY 'Due Date' and 'Reminder Date'

1. Search/Group Task's Filter

- a. Subject | Due Date | Priority | Contacts | Listings
- b. Tick box for 'Completed Task'

2. Task List

- a. Tick 'Completed' box when task is completed
- b. Sorting features for every column

3. Create/New Task

- a. Click 'Add NEW TASK'
- b. Edit: Subject > Due date > Reminder Date > set Priority > Listings (if any) > Contacts (if any) > Description > SAVE

4. Create Task from Listings

- a. Go to: Listings > Overview > Action Tools

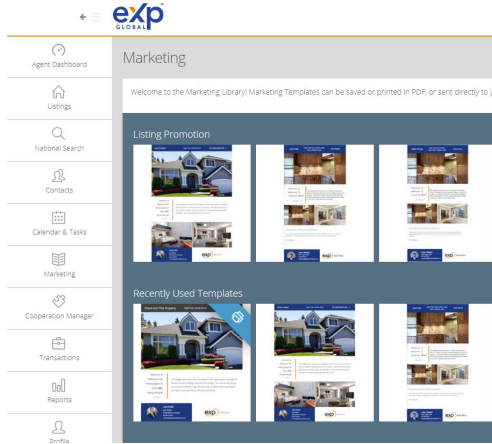
5. Create Task from Contacts

- a. Go to: Contacts Overview > Action Tools

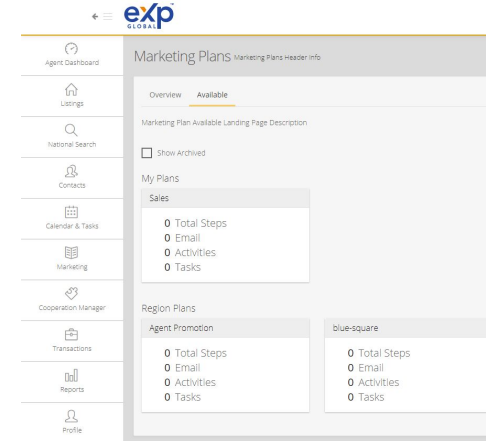
Part 2

Marketing Planning

8.0. Marketing - Two Types



VS.



Marketing on Demand

Communication done on an as needed basis:

- Send a recently listed Brochure
- Promote Property Share listings
- Send Thank you's, Home sale Anniversary, or Holiday greetings

Marketing Plans

Series of value add communications to contacts or keep top of mind messaging:

- Focus on contacts you need to keep in touch with i.e. those who want to sell/buy
- Tips for staging or selling a home
- After Sale Follow-up plan
- New Lead Marketing plan

8.0. Marketing - Stay Relevant

When sending communications, keep in mind!

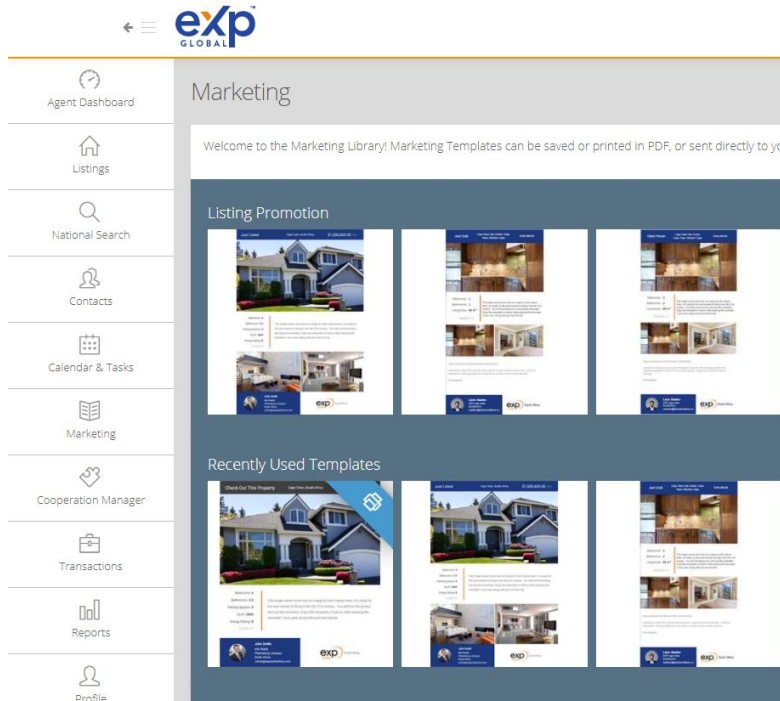
- Content or Messaging that is not relevant can dilute the effectiveness of your communications over time
- When messages are repeatedly sent that are not relevant, clients can start to tune out your messages
- This can negatively impact an agent's brand, rapport or long term client relationships
- Reaching a smaller segment with a custom message highly relevant message will have a more positive impact

PRODUCING IRRELEVANT CONTENT
IS YOUR BIGGEST THREAT

66%

44% OF RESPONDENTS WOULD CONSIDER ENDING
A BRAND RELATIONSHIP BECAUSE OF IRRELEVANT
CONTENT, AND AN ADDITIONAL 22% WOULD
DEFINITELY END THE RELATIONSHIP

8.1. Marketing - When to use On Demand



Use On Demand when you want to:

- Promote new listings to potential buyers in your contact database
- Provide information to a seller on how to best prepare their home for selling
- Send a customized communication to a contact for their birthday, home sale anniversary, special occasion/holiday or send a thank you message

Marketing on Demand

8.1. Marketing - Marketing on Demand

The screenshot shows the 'Marketing' section of the exp GLOBAL interface. A navigation menu on the left includes Agent Dashboard, Listings, National Search, Contacts, Calendar & Tasks, Marketing (highlighted), Cooperation Manager, Reports, Profile, and Market Place. The main content area is titled 'Marketing' and features a progress bar with four steps: 1. TEMPLATE (Just Listed Property), 2. LISTINGS (0 Listings Selected), 3. CONTACTS (0 Contacts Selected), and 4. PERSONALISE (Marketing Personalise). Below the progress bar are tabs for MY LISTINGS, OFFICE LISTINGS, and ALL LISTINGS (selected), with a 'Hide Advanced Filters' link. The search form includes fields for Contract Type (EXCLUSIVE), Listing Status (ACTIVE), Listing Id, Open House, Region (HONG KONG), Province/State (HONG KONG (GENERAL)), City (NOT SELECTED), Community (NOT SELECTED), Property Type (NOT SELECTED), Transaction Type (For Sale selected, For Rent, Market Segment (Residential selected, Commercial, Land), Min Listing Price, Max Listing Price, Living Rooms, Bedrooms, Bathrooms, Living Area (m²), Plot Size (m²), Property Status (NOT SELECTED), Features (NOT SELECTED), and Date Available. A SEARCH button and a RESET button are also present. At the bottom, a table header is visible with columns: Listing Id, Price, Listing Address, City, Province/State, Days On Market, Property Type, Agent/Office, and a note 'Please select 1 Listing.'

STEPS for Agents & Office Admin.:

1. Template Library

- Select the Agent Promotion, Saved & Popular Templates etc...
- Template creation wizard will display the steps along the top after selecting template

2. Listing Selection

- toggle between own listings, office listings or all listings in the region

3. Contact Selection

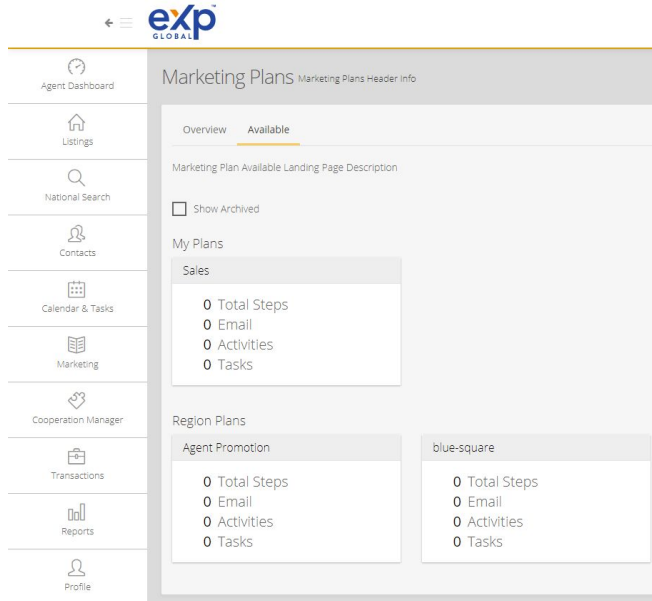
- Required to specify the contacts to send to
- Contacts (Buyer/Seller) can be search by Categories, names, star ratings, and/or contact details

4. Personalise Email

- Edit the subject
- Editor for body content including options to add images, links, and edit HTML

Simply click 'Send' to select date & time.

8.2. Marketing - When to use Marketing Plan



Marketing Plans

Use Marketing Planning when you want to:

- Stay connected with potential sellers i.e. how to price their home, stage rooms, take good pictures for listing their property
- Stay connected with potential buyers or Remain in contact with past clients (After Sale follow up plan)
- Follow up with clients you met at an event using a hightouch campaign highlighting your value as an agent
- Setup a long term (lower touch) plan for inactive clients who may be interested at a later date (to keep them aware of your services)

8.2. Marketing - Marketing Plan

1. Add New Plan

- a. Edit Plan Name & Description

2. Overview

- a. Assigned Contacts: email to be sent
- b. Email sending status: sent, delivered, opened, clicks, hard & soft bounce, and unsubscribed
- c. Shortcut KEYS: Assign Contacts, Clone Campaign, and Archive Plan

3. Details

- a. Outline of the steps and timing
- b. Structure your plan through the tools of Agenda, Email, and Task

4. Assign Contact

**Don't forget to SAVE
'FINALIZE & GO BACK'**

8.3. Marketing - Template Admin

1. Select Template

- a. Mouse-over and click on the 'red arrow' to existing templates or to save new templates

2. Create/Edit Marketing Template

- a. select a name and description for the template.
- b. To save as a new template, the name must be unique. Below this you can modify the email subject and body text.

3. After modifying

- a. Option of saving as New or Previewing. If this template is your own,
- b. Can also save the updated version with the Update button or delete the template by clicking Delete Template.

4. Finding Templates

- a. Templates can be assigned a category when saved (Agent Promotion, Special Occasions, Birthday etc...)
- b. will appear in the **Marketing Template Library**

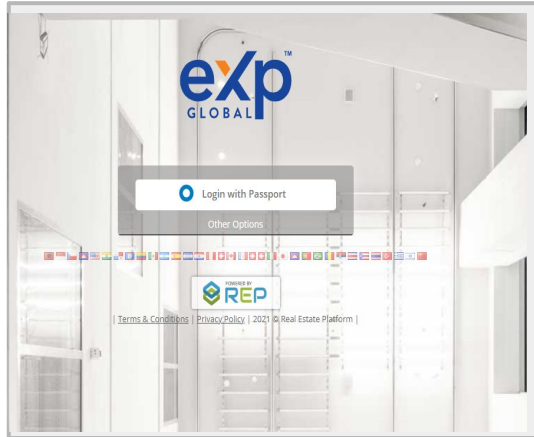
8.3. Marketing - Admin Option Newsletters

Use Newsletters when you want to:

- Capture and send information about general real estate trends in a given local market
- Send monthly or quarterly news, tips, trending updates
- This helps to establish the agent's brand and trust among buyers and sellers



Your Takeaways & To Do's



- Setup/View your Agent Dashboard
- Create your Profile
- Setup Buyer Profiles
- Begin Adding & Managing Contacts
- Begin Managing Property listings
- Update Your Calendar & Tasks
- Create/ Tailor Your Marketing Plan