REALM™

Getting Started Guide for Salespeople

PropTx Innovations Inc.

Three Ways To Access REALM™

1 Tools Page

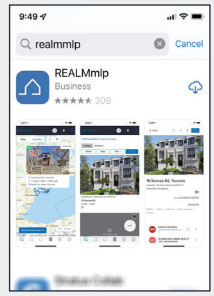
After logging in, click the link for REALM™.

2 Mobile App

Download the app in the Google Play Store or in the Apple App Store by searching for **realmmlp**

Log in using your PropTx Secure Authentication.

NOTE: You may turn on bio-metric authentication (Face ID or fingerprint) through the Avatar under **Settings** then **Security**.



3 Website URL

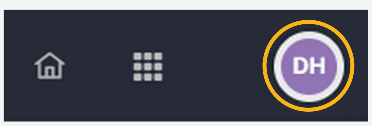
Go to **https://app.realmmlp.ca**

Log in using your PropTx Secure Authentication.

Customizing Options

Add Your Photo

If you invite your client to join REALM™, they will have many communication tools to keep in touch with you, and when they use these tools, they'll see your picture, if you upload it.

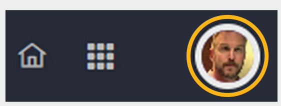


1. Click the **Avatar** icon.
2. Select **Settings**.
3. Click **My Profile**.
4. Click the **+** beside your initials.

5. Navigate to where your photo is located and double-click the file.

Edit Personalized Messages

If you email listings to a client, or invite clients to join REALM™, you'll want to ensure that the wording matches your communication style.

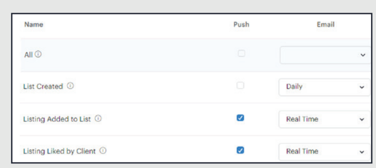


1. Click the **Avatar** icon.
2. Select **Settings**.
3. Click **Personalization**.
4. Change the heading and message body under Client Invitation, if necessary. If you invite a client to join REALM™, this is what will appear in the initial email. Click **Save** if you change the text.
5. Personalize the Welcome Message, if necessary. If the client decides to accept your invitation to join REALM™, this is the message that they'll receive. Click **Save** if you change the text.
6. Change the heading/message body under Send Listing and Signature, if necessary. This is the text that your client will see when you manually email listings to them. Click **Save** if you change the text.

Set Notifications

If you have invited clients working in REALM™, you may receive notifications if they perform specific actions in the application. You can be notified either in email and/or push notifications on your phone if you use the app.

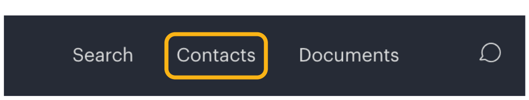
1. Click the **Avatar** icon.
2. Select **Settings**.
3. Click **Notifications**.
4. Choose the appropriate settings and click **Save**.



Adding Contacts

REALM™ is designed with many feedback and communication features to help you work with your clients. For these to function efficiently, enter your clients into REALM™ under Contacts.

1. Click **Contacts** in the top toolbar.



2. Click **Add**. +
3. Type the client's first and last names, and email address.
4. Click **Save** or **Save & Invite**. They are added as an Active contact.

TIP: Clicking **Save** adds the client to your Contacts list, but **doesn't invite them to join**. Clicking **Save & Invite** saves the client and sends them an invitation to join REALM™.

NOTE: *Active* is the category for clients with whom you are actively working. There's no limit to their number.

To remove a client's access to REALM™, click **Manage** and then select **Disabled**.

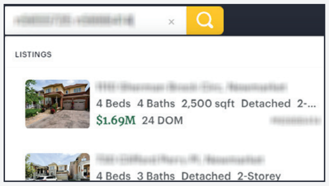
Eight Ways To Search For Listings

When you click Search in the menu bar, the default search results appear. Listings in Consumer view appear to the left and a map to the right. Search filters, used to refine the criteria, appear along the top.

1 Using the Universal Search Bar

The Universal Search Bar is visible at the top of all REALM™ screens. It can be used to search by address, MLS® System number, or property PIN.

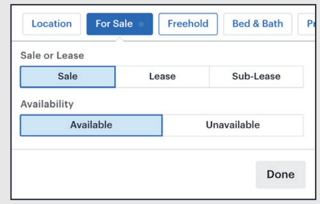
To search multiple MLS® System numbers at a time, separate them with a space.



2 By Sale Type & Availability

You may search for Available, Unavailable, Sale, Lease, and Sub-Lease.

1. Click **For Sale**.
2. Select one or more choices.
3. Select **Available**, **Unavailable**, or both and click **Done**.



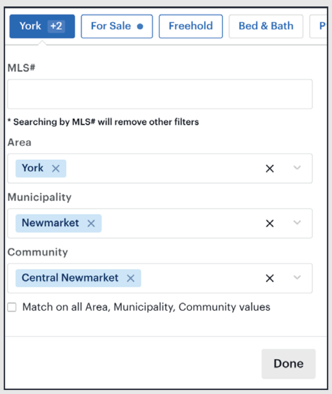
NOTE: To search unavailable listings older than two years for residential and four years for commercial, use either **Sold Date** or **Last Update** under **More Filters**.

3 Using the Location Filter

There are two ways to search by location: the Location filter and the map. To search using the Location filter:

1. Click **Search**, if necessary.
2. Select **Location**.
3. Click the drop-downs to select an Area, Municipality, and/or Community. The map updates. You may make more than one choice for each field.

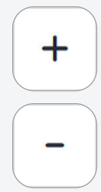
   The check mark beside *Match on all Area, Municipality, Community values* makes the three fields hierarchically dependent on each other as seen in this image.
4. Click **Done** to close the Locations filter. All Available, For Sale listings in the specified location(s) appear.



4 Using the Map Drawing Tools

Zooming in

Zoom into the area of interest on the map in one of two ways:



1. Use the **Zoom in** and **Zoom out** buttons to drill down the area of interest, dragging the map as necessary to reposition it.
2. Use your mouse roller button to zoom in and out of the map, or if using a trackpad, spread your fingers apart to zoom in.

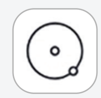
Drawing an area (Polygon)

Once the map is in the right place:

1. Adjust the zoom level of the map.
2. On the map's drawing tools, click **Draw a polygon**. The mouse pointer becomes a crosshair.
3. Click the map to start drawing.
4. Move the mouse in any direction, click again to change directions.
5. Repeat step 4 to create a search shape with several sides.
6. To complete the shape, click on the original starting point.

NOTE: You may draw more than one search shape on the map.

Drawing a Circle



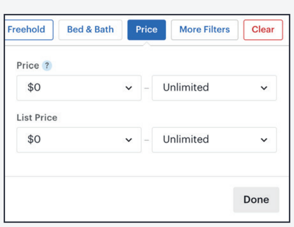
1. Adjust the zoom level of the map.
2. On the map's drawing tools, click **Draw a circle**. The mouse pointer becomes a crosshair.
3. Click the map, but don't release the mouse button.
4. To stretch out the circle, drag the mouse away from where you clicked. A measurement value shows the radius size.
5. Release the mouse button to complete the shape.

NOTE: You may draw more than one search shape on the map.

5 By Price

For Available listings, Price searches the current price of the property. For Unavailable listings, Price searches the closed price.

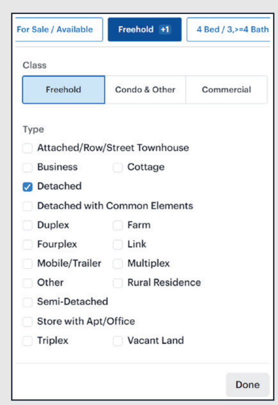
1. Click **Price**.
2. Click the drop-downs to select a min. and/or max value. If you want to type your own value, select **Custom** from the drop-down list.
3. Type the price and click **Done**.



6 By Class & Type

You may search one or more Classes (Freehold, Condo & Other, Commercial) and Types of property. The choices that you make will affect the remaining filters.

1. Click **Freehold**. This class may be different if you've changed the default search.
2. Select one or more Classes from Freehold, Condo & Other, or Commercial.
3. Select one or more Type(s). These may change based on the previous Class choice.
4. Click **Done**.

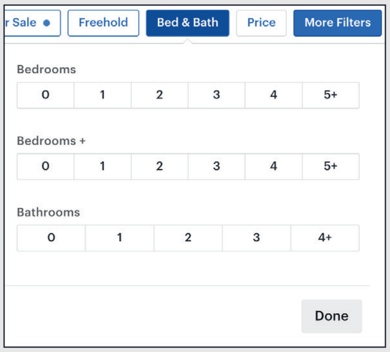


Eight Ways To Search For Listings (continued)

7 By Bedrooms & Bathrooms

This filter is only available **for Residential searches.** If you selected Freehold or Condo & Other, the Bed & Bath filter appears.

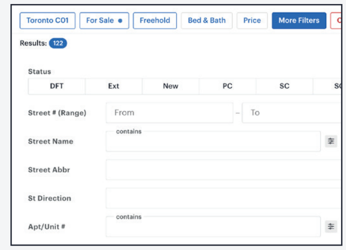
1. Click **Bed & Bath**.
2. Choose the appropriate number of bedrooms and bathrooms. These are exact numbers, so if you want 4 or more bedrooms, select 4 and 5+.
3. Click **Done**.



8 By Status, Address, Style, etc.

The remaining search filters are found under More Filters. To narrow your search further by adding additional criteria:

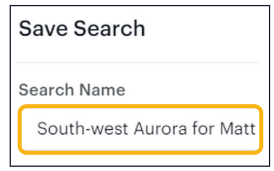
1. Click **More Filters**. Select the desired criteria. Make note of the counter at the top left indicating the number of listings found. You will not see more than 200 listings.
2. To add a field not found in the list, scroll to the bottom and select **Add a Field**, then click **Done**.



NOTE: To search for unavailable listings back several years, use either **Sold Date** or **Last Update** found under **More Filters**.

Using Saved Searches

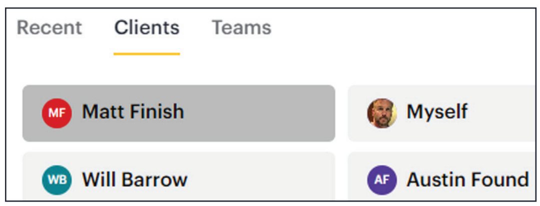
Saving a Search

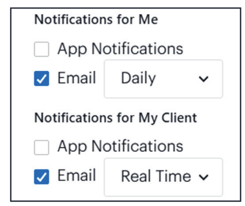


An unlimited number of searches can be saved for you and for Contacts. While saving the search, you may also turn it into an automated search that will email results; however, you are limited to 150 of these.

1. Click **Searches** near the top right of the map and then **Save Search**.
2. Type a name for the search.
3. Select to save the search for you (Myself) or a Contact.
4. Select how frequently you wish to be notified about new or changed listings and whether you want receive App notifications.

   NOTE: App notifications will appear on your phone if you are using the REALM™ app.



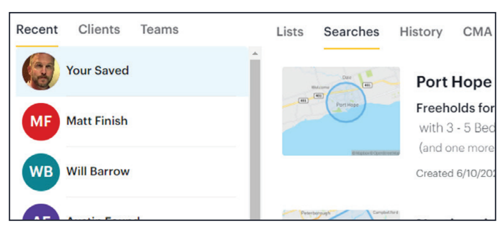


5. If you chose to save the search for a Contact, select how frequently they will be notified and whether they will receive App notifications.
6. Choose whether you (and your client) will get a large photo and more information in the email, or a small photo with a few details.
7. Click **Save Search**.

If you saved the search for a Contact, and they have accepted your invitation to join REALM™, they will be able to click a link in the email to view the full listing and interact with it (mark it as a Favorite, save it in a List, send you a chat message about the property, and even change the search criteria).

Editing a Saved Search

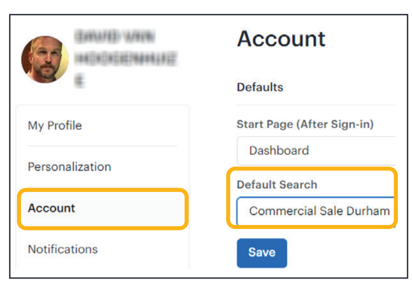
1. Click **Contacts** in the top toolbar.
2. If the search was saved for you, it will appear in the Searches list. If it was saved for a Contact, click their name.
3. Select the search to edit.
4. Edit the criteria, then click **Save Search**.
5. You may change the notification settings for you and your Contact and also save it as a different search, if desired.
6. Click **Save Search**.



Setting a Default Search

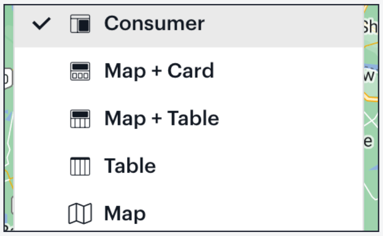
The default search is set to the most commonly searched properties: residential, available, for sale. What if you're a commercial practitioner or you only work with condominiums? You can change the default search, but you have to have your new default created and saved first.

1. Click the **Avatar** icon.
2. Select **Settings**.
3. Click **Account**.
4. Click the drop-down for Default Search and select the search.
5. Click **Save**.



Working With Listings

Viewing Results

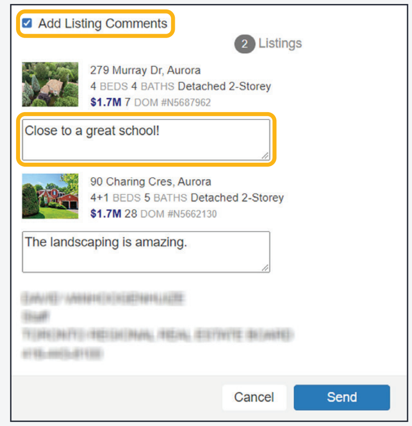


At the top-right of the search results, click **Layout** and then switch to an alternate view. Consumer is the default layout where large images of the properties appear along with 3 lines of information. Try out the other 4 layouts to see which suits you best. They can be sorted and saved as your default.

Printing Results

To print several listings, you must select them first. Use the check boxes in either Card or Table view, or select them while viewing the listings individually. To print listings, click the **Action** button either while viewing an individual property, or while in Card or Table view, and select **Print**. Since the listings contain so much data, choose **Broker Full – Sheet** or **Client Full – Sheet** if you want the listings to fit on one page.

Emailing Results

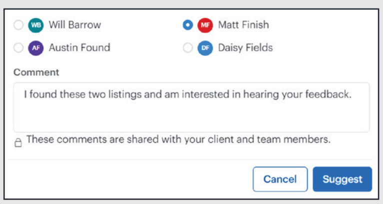


To email several listings, you must select them first. Use the check boxes in either Card or Table view, or select them while viewing the listings individually.

To email listings, click the **Action** button either while viewing an individual property, or while in Card or Table view after selecting several listings, and then select **Email**.

Optional: *Add Listing Comments* is a great way to point out features of the emailed listings to the client.

Suggesting Listings

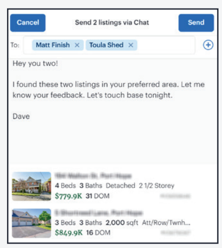


Avoid emails getting sent to spam by sending clients listings as a Suggestion. It is saved to their Suggestions list. They'll get a notification about the action.

NOTE: Only for invited clients.

1. Click **Suggest listing to client** while viewing an individual listing, or after selecting several listings in Card or Table view, click the **Action** button and then **Suggest**.
2. Click to select the Contact and type any Comments for them to read (optional).
3. Click **Suggest**. The listings will appear in the client's Lists under Suggestions.

Sending Listings in Chat



Unlike Suggest, Chat can be used for sending to several clients and the client(s) can respond to the chat message by sending one of their own.

NOTE: The Chat feature is within REALM™, not other chat platforms.

1. Click **Chat** while viewing a listing, or after selecting several listings in Card/Table view, click the **Action** button and then **Chat**.
2. Click the **To** field, select the **Clients** list, and select the client.
3. Type a message for the client.
4. Click **Send**. The listings will appear to the client as a chat message after logging in.

NOTE: If the message was sent to several recipients, they will notice this fact.

Saving Favourite Listings

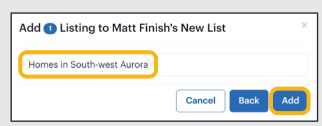
A maximum of 250 listings may be saved in your Like list within REALM™.

1. Click **Add to Likes** while viewing an individual listing, or after selecting several listings in Card or Table view, click the **Action** button and then **Add to Likes**.
2. The listings are saved under Saved and then Likes.

Saving Listings in Custom Lists

You can save listings to a List folder of your own creation. Save up to 250 listings in each folder.

1. Click the **Action** button while viewing an individual property, or while in Card or Table view after selecting several listings, and then click **Add to List**.
2. Click either the **Clients**, to save listings for a client, or **My Lists** to save listings for yourself.

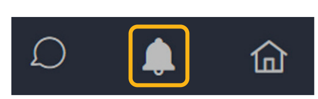


3. If the List already exists, select the List and the properties save to it. If the List needs to be created first, click **New List**, type a name for the List and then select **Add**.

Opening a Duplicate Tab

You may open a second, third, fourth, etc., window in REALM™ to work on other tasks without losing your work in a previous window. Simply **right-click** the browser's tab (if using Windows) or **Control + click** (if using a Mac) and select **Duplicate**.

Viewing Recent Activity



Notifications displays a drop-down list of all of your activity and interactions with clients. This list includes auto-email searches saved for both you and your clients, email messages, actions with Teams, adding clients, and the various actions being tracked through your Notifications settings.