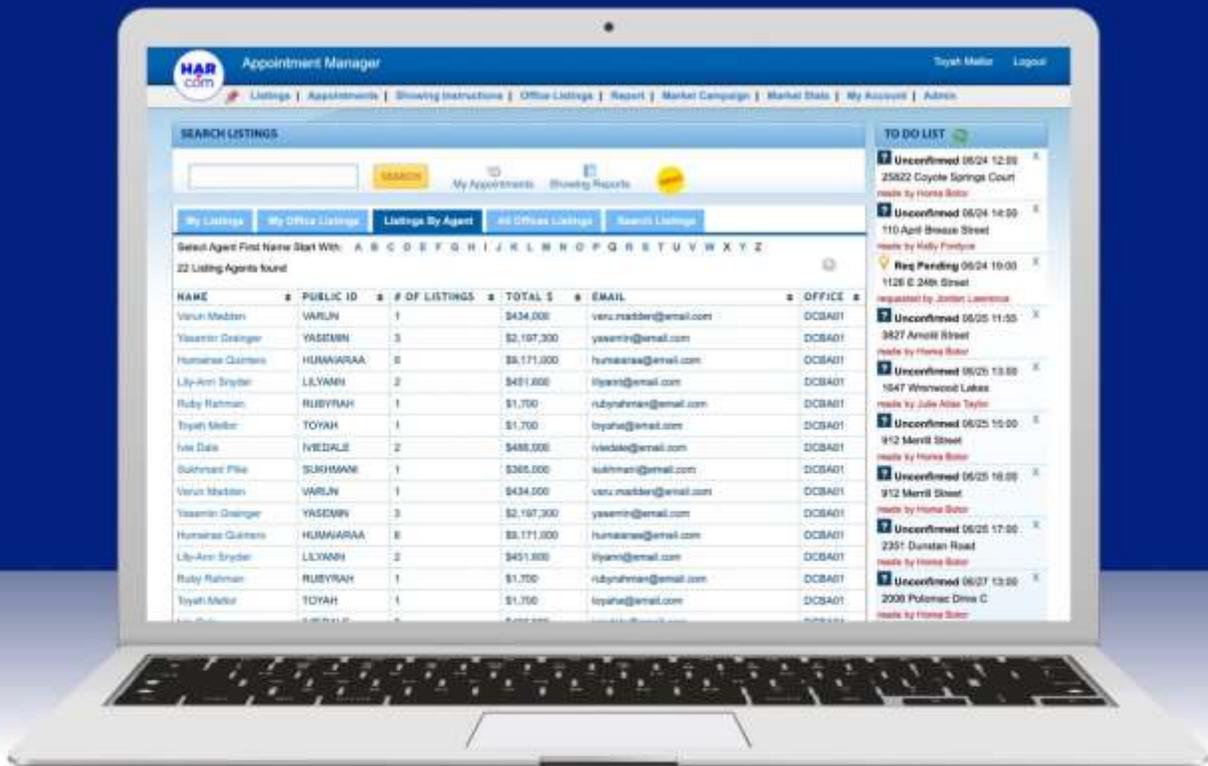




Meet the Appointment Manager



Main Office: 3693 Southwest Fwy., Houston, TX 77027 | 713-629-1900 | www.har.com

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Description & Overview

Appointment Manager is a platform created by the Houston Association of Realtors® to enable Brokerages on the Platinum platform to manage the scheduling of property showings internally. This proven system has processed more than 1.6 million appointments and is currently used by some of the leading firms in the Houston real estate market areas.

Initial Setup for Appointment Manager:

Technical

- HAR Technology Department needs to be contacted by the Brokerage Office to create initial Office setup and system access.
- At least one office contact needs to be defined as the System Administrator to complete the initial setup by HAR.
- The following 3 default users' roles are defined with the corresponding access rights, you can edit their access rights depending on your brokerage business model (additional and custom roles can be created by the System Administrator):

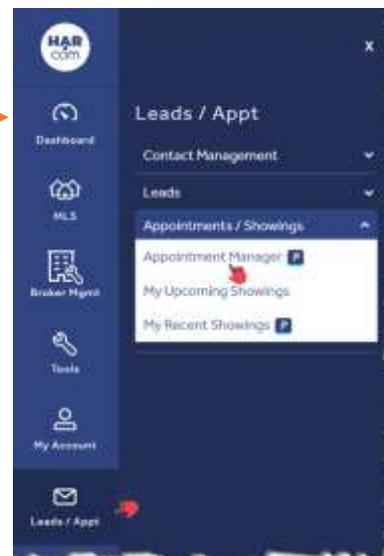
The screenshot displays the 'ADMINISTRATIVE AREA' for 'Appointment Manager User Roles'. It shows three roles: AGENT, OFFICE ASSISTANT, and ADMINISTRATOR. Each role has a list of permissions with checkboxes indicating access rights.

Role Name	View Appointments	Add/Edit Appointments	View Showing Instructions	Add/Edit Showing Instructions	View Feedback	Add/Edit Feedback	Market Stats Report
ADMINISTRATOR	<input checked="" type="checkbox"/> -View Appointments For My Office's Listings	<input checked="" type="checkbox"/> -Add/Edit Appointments For My Listings <input checked="" type="checkbox"/> -Add/Edit Appointments For My Office's Listings	<input checked="" type="checkbox"/> -View Showing Instructions For My Office's Listings	<input checked="" type="checkbox"/> -Add/Edit Showing Instructions For My Listings <input checked="" type="checkbox"/> -Add/Edit Showing Instructions For My Office's Listings	<input checked="" type="checkbox"/> -View Feedback For All My Office's Listings	<input checked="" type="checkbox"/> -Add/Edit Feedback For My Listings <input checked="" type="checkbox"/> -Add/Edit Feedback For My Office's Listings	<input checked="" type="checkbox"/> View Agent Market Stats Report <input checked="" type="checkbox"/> View Broker Market Stats Report
OFFICE ASSISTANT	<input checked="" type="checkbox"/> -View Appointments For My Office's Listings	<input checked="" type="checkbox"/> -Add/Edit Appointments For My Listings <input checked="" type="checkbox"/> -Add/Edit Appointments For My Office's Listings	<input checked="" type="checkbox"/> -View Showing Instructions For My Office's Listings	<input checked="" type="checkbox"/> -Add/Edit Showing Instructions For My Listings <input checked="" type="checkbox"/> -Add/Edit Showing Instructions For My Office's Listings	<input checked="" type="checkbox"/> -View Feedback For All My Office's Listings	<input checked="" type="checkbox"/> -Add/Edit Feedback For My Listings <input checked="" type="checkbox"/> -Add/Edit Feedback For My Office's Listings	<input checked="" type="checkbox"/> View Agent Market Stats Report <input checked="" type="checkbox"/> View Broker Market Stats Report
AGENT	<input checked="" type="checkbox"/> -View Appointments For My Office's Listings	<input checked="" type="checkbox"/> -Add/Edit Appointments For My Listings <input type="checkbox"/> -Add/Edit Appointments For My Office's Listings	<input checked="" type="checkbox"/> -View Showing Instructions For My Office's Listings	<input checked="" type="checkbox"/> -Add/Edit Showing Instructions For My Listings <input type="checkbox"/> -Add/Edit Showing Instructions For My Office's Listings	<input type="checkbox"/> -View Feedback For All My Office's Listings	<input checked="" type="checkbox"/> -Add/Edit Feedback For My Listings <input type="checkbox"/> -Add/Edit Feedback For My Office's Listings	<input checked="" type="checkbox"/> View Agent Market Stats Report <input type="checkbox"/> View Broker Market Stats Report

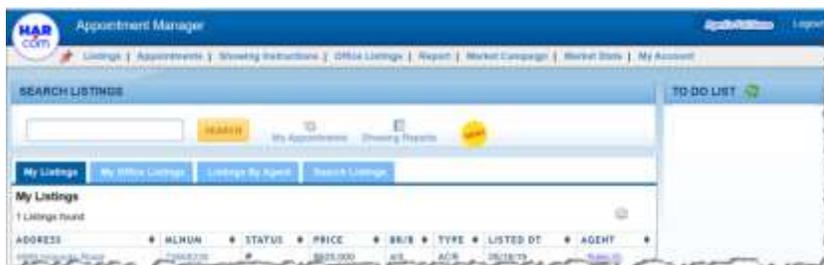
Note: there is a difference between System Administrator (can define user roles and change all system access) & Administrator Role (only has the rights defined above related to appointment, showing instructions, feedback, and reports).

Accessing Appointment Manager

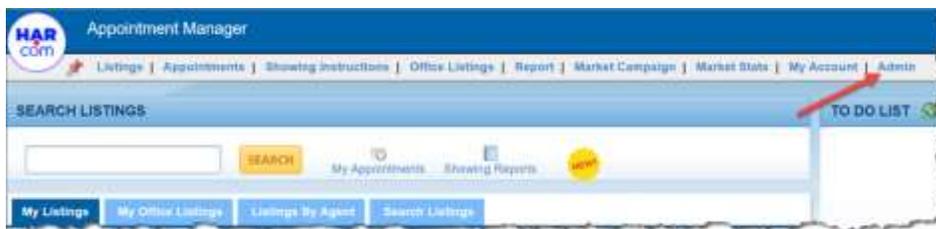
Selecting Leads / Appt from the Members Only Portal, provides a menu selection for Appointment Manager as shown on the right → or from the Members Only Portal, begin typing Appointment Manager and you see a search results list appear, the click on Appointment Manager, as shown in the image:



As an agent, you are presented with the MY Listings Tab as showing in the following image:



As a System Administrator, you are presented with same screen with the additional Admin option as shown in the following image:



Adding Users

The System Administrator is responsible for providing and maintaining agents' access to the system.

1. Adding users is done by selecting Import New Users under the Users tab and selecting all users or specific user from the office agent list displayed & selecting the default **user role** and **user type** for the import, as shown in the following image:

The screenshot shows the 'ADMINISTRATIVE AREA' with tabs for 'User Roles', 'Users', 'Offices', and 'General'. The 'Users' tab is active, and the 'Import Users' section is expanded. It includes links for 'Import New Users', 'User Roles Not Assigned', 'Appointment Manager Admin Users (Not MLS or HAR member)', 'Check Inactive HAR Members', and 'Check Agent Who Changed Company'. Below this is a 'Search Users' section with input fields for 'First Name' and 'Last Name', radio buttons for 'Regular User' and 'Admin User', and a 'User Role' dropdown menu. To the right, the 'User Administration' section is visible, featuring a 'Check All' checkbox, a list of agents (e.g., 'RIV101 - 21396 Provincial Blvd'), and radio buttons for 'Regular User' and 'Admin User'. Below that are radio buttons for 'AGENT', 'OFFICE ASSISTANT', and 'ADMINISTRATOR', and an 'Import' button. Red arrows point to the 'Check All' checkbox, the agent list, the 'Regular User' radio button, and the 'AGENT' radio button.

Note: The user type should be Regular user, and the roles should be Agent. Once imported the administrator can modify the **Type** and **Role** of any specific user by performing a user search in the Search Users section and clicking on the agent name in the results screen and applying any changes or deleting the user. See following image:

The screenshot shows the 'Search Result' section with a table of search results. The table has columns for 'NAME', 'EMAIL', 'OFFICE', and 'ROLE'. The first row shows 'Agent's Full Name', 'Email Address', 'RIV101', and 'AGENT'. A red arrow points to the 'Agent's Full Name' link. To the right, the 'User Administration' section is expanded, showing fields for 'Email', 'First Name', 'Last Name', 'Office', 'Contact Phone', 'Cell Phone w/ Texting Capability', 'Contact Preference', 'Showing Notification Preference', 'Online Request From Matrix Preference', 'Application User Type', 'Showing Staff', 'User Roles', and 'User Status'. Red arrows point to the 'Agent's First Name' and 'Agent's Last Name' input fields, the 'Office' dropdown menu, the 'AGENT' radio button, and the 'Update' button.

2. **Search Listings** box accepts inputting the Property Address or MLS number
3. **MLNUM** links to Matrix Detail page (if user is an active MLS member),
4. **ADDRESS** link pops up the “Quick Details” window. As shown below:



This “window is the center of the actions, where most of activity happens related to the listing: Schedule Appointments, Showing Instructions, View Appointments and View Feedback for a listing, Comparable Searches, House Sheet (Property Flyer).

5. Selecting **Your Comparable Listing** will display office listing which are comparable to the selected listing, if any.
6. Selecting **MLS Comparable Listing** will display all MLS Active, OP, PSHO, P similar to the selected listing as shown in the following image:

Search Results								
Price: \$562,500 - \$687,500, Subdivision: None, Property Type: ACR								
71 Listings found								
ADDRESS	MLNUM	STATUS	PRICE	BR/B	TYPE	LISTED DT	AGENT	
82 Acres Acr 2213	78714316	A	\$649,900	3/2.1	ACR	06/12/20	DMARKHAM	
0 Bailey Road Road	84286210	A	\$627,360	/	ACR	02/20/18	JMaertz	
TBD Bernardo	16880600	P	\$686,400	/	ACR	01/16/20	HEIDIHH	
109 Black Road	21761017	A	\$655,000	/	ACR	05/22/18	lthegar	
00 Bo Brown Rd	54784431	A	\$613,050	/	ACR	10/15/19	FLACK	
0 Bo Brown Road	19357572	A	\$650,103	/	ACR	06/03/19	CAshorn	
0 Bo Brown Road	69945402	A	\$573,500	/	ACR	10/15/19	FLACK	
00 Bo Brown Road	16880055	A	\$601,400	/	ACR	10/15/19	FLACK	
1199 Carter Lake Drive	3229839	A	\$672,000	3/1.0	ACR	04/23/20	RanchSales	
39748 Chambers Road	38338970	OP	\$665,000	3/2.1	ACR	04/14/20	dnichols	
1622 Country Road 122	38955130	A	\$604,500	2/1.	ACR	05/05/20	rdparsons	
0 County Rd 4223	17776259	A	\$609,500	/	ACR	05/20/19	FLACK	
101 County Road 118	51356942	P	\$570,000	/	ACR	04/08/20	CLMaxwell	
1599 County Road 220	13381714	A	\$625,000	/	ACR	10/15/19	AJOHNEY	
00 County Road 230	77474882	A	\$684,400	/	ACR	07/12/19	ABURES	

To Do List

Appointment Manager designed for multi-tasking; it is tab based and you can have unlimited open tabs for all the concurrent task being performed. For example, an operator is waiting for confirmation form client and at same time receiving new request online or over the phone.

1. When an "Online Appointment" is request via Matrix, the entry will appear in the To Do List Column,
2. When a showing is scheduled but in unconfirmed status, it will also appear in the To Do List and you can click on the item on the To Do List to quickly finish the process while you are paused.
3. The To Do List automatically refreshes every 2 minutes. There are only 2 Statuses for the To Do List "Unconfirmed" and "Request Pending"; once the showing status has changed, the item is eliminated from the To Do List.

Showing Instructions

1. Each listing requires to have defined Showing Instructions to be able to schedule appointments. Clicking on the displayed listing, then selecting the Showing Instruction Option is how the showing details are entered, as shown in the following image to the right:
 - a. Select the **Home Status** indicating if the home is Vacant, Occupied, Tenant Occupied or None.
 - b. Select the **Show Status** indicating Go Ahead & Show, Leave Message, Must Be Confirmed or None.
 - c. **Automation** permits owner to confirm appointments online. If this option is selected be sure to provide the Owner's Contact information in the right side of the screen. See following image:

The screenshot shows the 'Showing Instructions' form for listing 4999 Hranicky Road. The form is divided into several sections:

- Home Status:** Radio buttons for Vacant, Occupied, Tenant Occupied, and None.
- Show Status:** Radio buttons for Go Ahead & Show, Leave Message, Must Be Confirmed, and None.
- Automation:** Checkboxes for 'Allow owner to confirm appointments online' and 'Automatically schedule appointments'.
- Lock Box:** Radio buttons for Supra, Accompanied Box, and Combo, with sub-options for Keys in the office and Concierge.
- Lock Box Location:** Text field for Front Door.
- Accompanied:** Radio buttons for Yes and No.
- Alarm System:** Radio buttons for Yes and No.
- Showing Agent Instructions:** Text area for agent instructions.
- Private Instructions:** Text area for private instructions.
- Temporary Notes:** Text area for temporary notes.
- Temp Notes Expire:** Text field for expiration date.
- Tag:** Text field for a custom tag.
- Owner Contact:** Section with an 'Add New Contact' button highlighted by an orange arrow.

Clicking on **Add New Contact** provides the ability to add unlimited contacts with various preferred methods of contact.

The 'Owner Contact' form is shown in three views:

- Form View:** Fields for Name (First Name 1, Last Name 1), Address (4999 Hranicky Road), City (Shulinerburg), State (TX), Zip (77450), Email (Owner1@gmail.com), and Phone (713-555-5555).
- Form View:** Fields for Name (First Name 2, Last Name 2), Address, City, State, Zip, Email (Owner2@gmail.com), and Phone (713-555-5555).
- Form View:** Fields for Name (First Name 3, Last Name 3), Address (4999 Hranicky Road, Cokerburg TX 77450), City, State, Zip, Email (Owner3@gmail.com), and Phone (713-555-5555).

 Below the form are checkboxes for 'Send showing notification via email' and 'Send showing notification via SMS', and a 'Preferred Contact Method' section with radio buttons for Email, Text Message To Cell Phone, and Phone Following (Home, Cellphone, Work, Other).

- d. Select **Lock Box** indicating Supra, Accompanied Box, Combo, Keys in the Office, Concierge, or None.
 - e. Enter the **Lock Box Location**, for example front door, gas meter, back door, etc.
 - f. Indicate if **Accompanied** is required with a Yes or No (typically for higher end or occupied homes with special conditions).
 - g. Indicate in an **Alarm System** is present with a Yes or No and any arming/disarming **Showing Agent Instructions**.
 - h. Lastly, Private Instructions, Temporary Notes are for the listing brokerage and not shared with the showing agent!
2. The entire office showing instruction can be view by selecting the **Showing Instructions** menu option, then clicking on the **My Office Listings** tab. Each listing will display showing:

Green Check means listings had Showing instructions, Pencil indicates listing contains notes, Bell alerts there is an alarm code, People Image indicates accompanied showing is required Red Triangle identifies there are temporary notes. See sample image to the right:

Showing Instructions

My Listings | My Office Listings | All Offices Listings | Search Showing Instructions

Showing Instructions of My Office Listings

902 Listings found

SR	ADDRESS	MLNUM	HOME STATUS	SHOW STATUS	LOCKBOX
✓	7827 Chesberry Sky Lane	40722538	Occupied	Must Be Confirmed	Supra
✓	732 W 22nd Street	8080854	Vacant	Go Ahead Show	Supra
✓	10002 Cheslerfield Drive	1368216	Vacant	Go Ahead Show	Combo
✓	8942 Beautyberry	14135199	Occupied	Must Be Confirmed	Supra
✓	1627 Millard Street	18372793	Vacant	Must Be Confirmed	Supra
✓	121 N Post Oak Lane 1303-04	8438579	Occupied	Must Be Confirmed	None
✓	4401 Fernwood Drive	16006880	Vacant	Go Ahead Show	Supra
✓	2305 Blue Bonnet Boulevard	83907658	Vacant	Must Be Confirmed	Supra
✓	2817 Altam Road	9024748	None	Must Be Confirmed	None
✓	1304 Berkland Pine Lane	28000782	Occupied	Must Be Confirmed	Supra
✓	5515 Roslyn Ct Court	60584105	Occupied	Must Be Confirmed	Supra
✓	2000 Chisham Road	44033624	Occupied	Must Be Confirmed	Supra

Appointment Processing

1. If someone calls to Appointment Desk to schedule an appointment; the Appointment Manager user must **click** on the **listing** and **enter** the **Public ID** or Search for the Showing agent and the Public ID is Entered, **Click** the option to **Schedule Appointments**, as shown in the following image:

The screenshot shows the HAR Appointment Manager interface. At the top, there are navigation tabs: "My Listings", "My Office Listings", "Listings by Agent", and "Search Listings". Below this, a listing is displayed with the following details:

- Address: 4999 Hranicky Road
- MLNUM: 73668226
- Status: P
- Price: \$825,000
- BR/B: 4/3
- Type: ACH
- Listed Dt: 03/16/19

The "QUICK DETAILS" modal is open, showing the following information:

- MLS #: 73668226
- Property Type: Country Homes/Acreage
- Listing Price: \$825,000
- Status: P
- Bed / Bath: 4 / 3
- Listing Agent: Listing Agent Name: RVN01
- View Agent Full Report
- Accompanied
- Showing Instructions:

On the right side of the modal, there are several buttons and options:

- Public ID in Search Agent: RGORTIZ
- Schedule Appointments (highlighted with a red arrow)
- Showing Instructions
- Print Showing Instructions
- Your Comparable Listings
- MLS Comparable Listings
- Quick Cross Search
- Issue Sheet

The tab that showing agent's information will display, in addition to the showing instructions and the options for processing the appointment.

2. Select the type of appointment being requested, either Agent Preview or Showing. Enter the Date and Start and Ending time of the Appointment, document and Notes or Remarks if necessary, if the showing instructions require "Accompany", the drop down list will show all who have been identified to be able to accompany the showings. Lastly, indicate the Status if confirmed, denied, etc. Refer to following image:

Listing Information

ADDRESS	DETAIL	PRICE	L/AGENT	TYPE	STATUS
4999 Hranicky Road Schulenburg	73668226	\$625,000	Listing Agent	Country Homes/Acreage	P

Showing Agent Info

RGORTIZ [Change Agent](#)

Richard Ortiz
 Rivich Realty
 21396 Provincial Blvd
 Katy, TX 77450
 Office: (281) 766-7849

Agent Type:
 Buyer's Agent
 Intermediary
 Sub Agent

Contact Info
 Phone: 281 - 757 - 2009
 Email: Richard@RivichRealty.com

Showing Instructions

Home Status: Vacant
 Show Status: Must Be Confirmed
 Automation:
 Lock Box Type: Combo
 Lock Box Location: Front Door
 Accompany: Yes
 Alarm: No

Driving Direction

from Houston, take I-10 West (97 miles), take exit 688 toward Engle/Farm to Market 2238 (0.2 miles), Sharp right onto Hranicky Rd. (0.9), turn left at 4999 Hranicky Rd.

Appointment

Making A New Appointment

Type: Agent Preview Showing

Date: 06/22/2020

Time: 04:00 PM - 04:45 PM

Notes & Remarks:

Accompany: [Accompany Agent](#)

Status: Unconfirmed [Save](#) [Save and Notify](#)

Upcoming A

No appointment

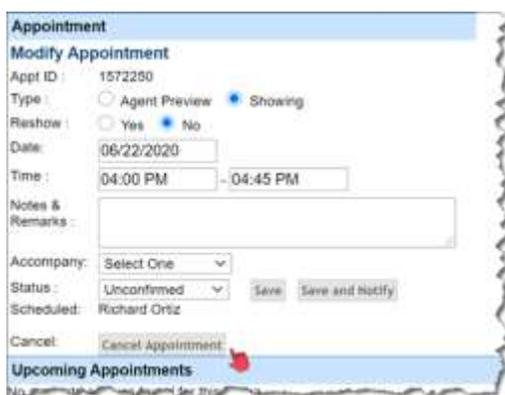
Confirmed
 Go Ahead Show
 Listing
 Courtesy Call
 Vacant
 Declined
 Unconfirmed

Note: Online Request from To do Listing already has the showing agent information details, all that is needed it to confirm or decline the showing request.

- Be sure to Select "Save" to later confirm or decline the appointment or Select "Save and Notify" to save the appointment and notify the showing agent of the decision if Approved or Denied.
- Depending on the showing instructions, the seller will likely need to be notified to approve the appointment. The To Do List (which is viewable from the Listing, Appointments, and Showing Instructions Menus) will now contain unconfirmed and Req Pending tasks as shown in the image to the right:
- Once seller has been contacted and the appointment decision has been made, change the status of the appointment to Confirmed, change date and or time, or even cancel, click on the listing on the To Do List then click on the edit icon to modify the appointment as shown in image below:



- The appointment screen will display as shown in line 2 above, but now will also contain the option to Cancel:



7. Remember the client (seller) will can confirm appointment directly if the Automation option is selected in Showing Instructions, as previously explained and shown in the following image:

Showing Instructions

Home Status Vacant Occupied Tenant Occupied None

Show Status Go Ahead & Show Leave Message
 Must Be Confirmed None

Automation Allow owner to confirm appointments online

Showing Notifications

Once the appointment has been approved, that show agent will receive notification, in addition showing instructions are provided if the appointment was approved.



Appointment Feedback Notifications

Once the appointment time has passed the Showing Feedback requests are automatically sent to showing agent couple hours after they showed properties and system will attempt to get feedback for a total of 3 times in 2 days. showing agent will receive the following notification for feedback:





Selecting **View Appointments** from Quick Details displays view showing history for a listing and the Showing Agent's Email can be used to contact agent who have previously shown the property and shown in image to the right:



Selecting **View Feedback** will display all appointment for the listing, if feedback has been provided, the showing date and time, if the appointment was completed, rescheduled or cancelled, showing agent and their office; as shown in the following image:

APPT ID	HAS FEEDBACK	SHOWING DATE/TIME	STATUS	SHOWING AGENT	SHOWING OFFICE
1563272	<input type="checkbox"/>	06/05/2020 12:30 PM	Completed	Ralph Hamilton	RDFN02
1561720	<input checked="" type="checkbox"/>	06/03/2020 08:00 PM	Completed	Mohamad Hafiz	CNA001
1561378	<input type="checkbox"/>	06/03/2020 08:00 PM	Completed	Carlene Leyden	NBER01
1560564	<input type="checkbox"/>	05/01/2020 04:15 PM	Completed	Jenny Corrao	JEG001
1550325	<input type="checkbox"/>	05/30/2020 11:45 AM	Completed	Tracie Compton	RELM05
1550177	<input type="checkbox"/>	05/28/2020 04:30 PM	Completed	Abla Amin	CREG01
1557386	<input checked="" type="checkbox"/>	05/28/2020 04:30 PM	Completed	Melba McGowen	RMS001
1558048	<input type="checkbox"/>	05/27/2020 08:00 PM	Cancelled	Kristi DeLaFuerre	JNKP01
1557901	<input type="checkbox"/>	05/27/2020 05:30 PM	Cancelled	Abla Amin	CREG01
1557906	<input checked="" type="checkbox"/>	05/27/2020 02:00 PM	Completed	Erin Phelps	KWFL01
1556219	<input type="checkbox"/>	05/25/2020 10:00 AM	Completed	Nicole Saltbush	NANP01
1557163	<input checked="" type="checkbox"/>	05/24/2020 10:00 AM	Completed	Krista Lantle	CMTX01
1556727	<input type="checkbox"/>	05/21/2020 03:00 PM	Completed	Lee Jananda	EXPO01
1548710	<input checked="" type="checkbox"/>	05/13/2020 11:00 AM	Completed	Terry Hightower	KWPD01
1546891	<input type="checkbox"/>	05/04/2020 02:00 PM	Cancelled	Andrew Cooper	RMXM01
1544381	<input type="checkbox"/>	04/30/2020 08:30 PM	Completed	Demetria Rutherford	BRAP01
1540678	<input checked="" type="checkbox"/>	04/20/2020 04:45 PM	Completed	Justin Duffield	KWISW01
1540412	<input type="checkbox"/>	04/15/2020 03:00 PM	Completed	Caroline Schlemmer	CMTX01

Reporting

8. The reporting section of Appointment Manager allows users to create reports based on showings, listing inventory, showing instructions and more.

Appointment Report Creator- Allows the user to select multiple criteria to search scheduled appointments and produce a printable report based on these criteria. There is a save option which saves the criteria for the report but not the report itself.

Inventory Report Creator- Allows the user to select multiple criteria to search the company listings and produce a one-liner printed report based on these criteria.

Inventory Detail Report Creator- Allows the user to select multiple criteria to search the company listings and produce a descriptive printed report based on these criteria.

Feedback Report Creator- Allows a user to select multiple criteria to search the past appointments/showings and display that showing information along with any available feedback for each showing.

Showing Report - Displays all showing by an agent or by a specific property in a specified date range. The showing report also includes any feedback submitted on a showing and is available in an agent view or client view. The client view of this report has the following additional features:

- All reports can be downloaded as a PDF or Excel spreadsheet
- Ad Hoc Report and Saved Report capabilities
- Reports can be automatically generated and sent via email on a weekly basis
- Saved Reports can be shared with entire office

The screenshot displays the 'REPORT MENU' on the left and the 'REPORT' form on the right. The 'REPORT' form is titled 'Showing Feedback Report' and includes a 'Select Search Criteria:' section with the following fields:

- Listing Status: [act, op, psho, pend]
- Address: []
- MLS#: []
- Showing Agent's Publicid: []
- Listing Agent's Publicid: []
- Date From: []
- Date To: []

At the bottom of the form, there are three buttons: 'Run Report', 'Save Report', and 'Clear'.

Additional Administrative Settings

The System Administrator is responsible for also configuring the setting for Offices.

- Each office will have its own Participating Offices settings window where the email for Online Appoint Requests are directed to by each offer. If left blank, the listing agent will be the default recipient of the request. In addition, if desired to have off-hour request (when no one is manning the appointment requests) sent to the listing agent, you must indicate the time which represent "Off Hours", refer to the following image:

The screenshot shows the 'ADMINISTRATIVE AREA' with tabs for 'User Roles', 'Users', 'Offices', and 'General'. Under 'Participating Offices', two office entries are shown:

- CMTX04**: 25511 Budden Road, Suite 3602, Compass RE Texas, LLC. Office Email Address for Online Request: showings-houston@compass.com. Status: Active.
- CMTX01**: 9 Greenway Plaza Ste 1100, Compass RE Texas, LLC. Office Email Address for Online Request: showings-houston@compass.com. Status: Active.

Red arrows highlight the 'Office Email Address for Online Request' field and the 'Off Hours' field for both offices. The 'Off Hours' field for CMTX01 shows a clock icon and the text 'HOUSTON - TX'. A note at the bottom states: 'To add additional office to the system, please have your broker contact support@har.com, 713-629-1900 x 374'.

- Lastly, under the General tab, the brokerage office System Administrator contact to HAR is listed, Email for the Appointment Requests, Phone Number to Appointment Desk, the option to have To Do List (tasks to process appointment requests) sent to the office of the listing or all listing to one location, indicate if the office chooses to manage sending client rating invitations or for if to be handled by HAR, see following image:

The screenshot shows the 'ADMINISTRATIVE AREA' with tabs for 'User Roles', 'Users', 'Offices', and 'General'. Under 'Appointment Manager General Setting', the following fields are visible:

- Appointment Desk Contact Person**: Homa Botor
- Appointment Desk Email**: showings-houston@compass.com
- Appointment Desk Phone Number**: 832.479.7525
- Detail Property Dynamic Link**: http://www.har.com/ (with a 'Test' button and a note: 'Please input URL in a format so that this URL take MLNUM as last parameter. Update first and then click on "Test" to check if URL is correct')
- To Do List Setting**: For user whose user role can add/edit appointments for all offices, you can change "To Do List" setting here:
 - Only show unconfirmed showings and online requests for user's own office
 - Show unconfirmed showings and online requests for all offices
- Client Experience Rating**: Check if you want office staff have the ability to manage sending client experience rating invitation on behalf of agent.
 - Yes, incorporate the Client Experience Rating into Appointment Desk System

An 'Update' button is located at the bottom of the form.