Meet the Appointment Manager

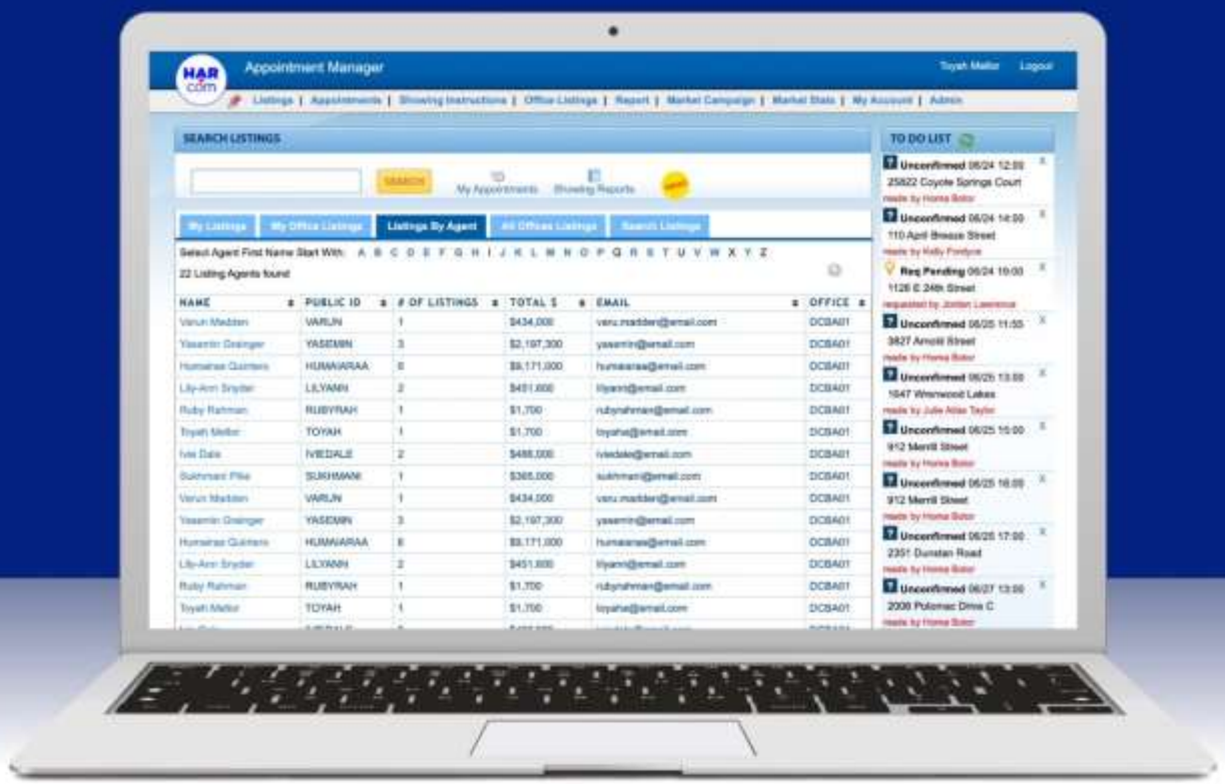

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Table of Contents

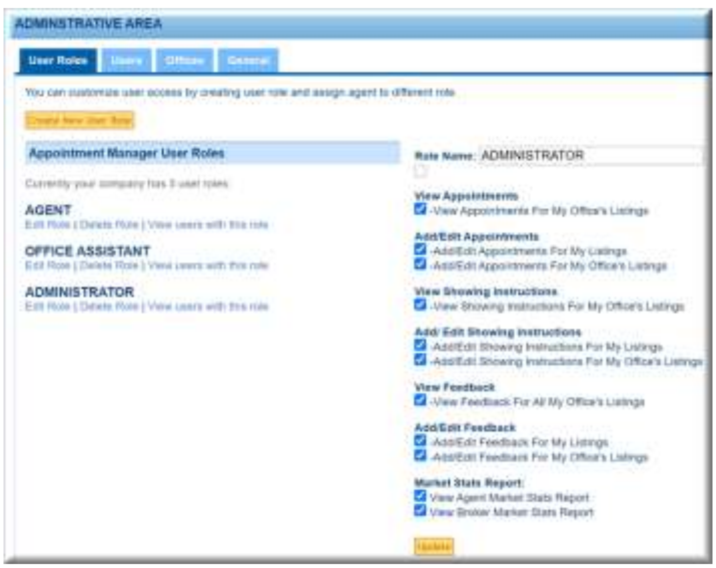
Description & Overview

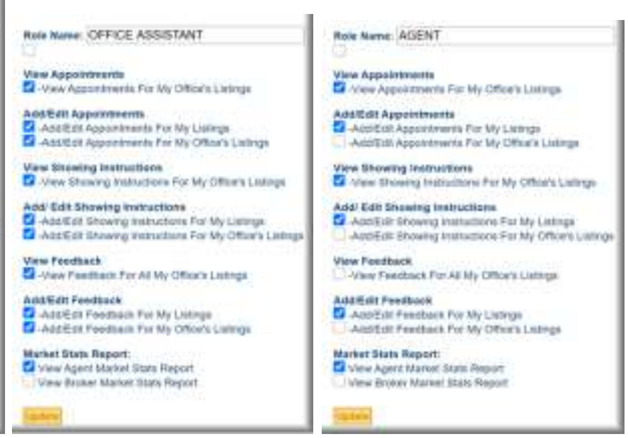
Appointment Manager is a platform created by the Houston Association of Realtors® to enable Brokerages on the Platinum platform to manage the scheduling of property showings internally. This proven system has processed more than 1.6 million appointments and is currently used by some of the leading firms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

Initial Setup for Appointment Manager:

Technical

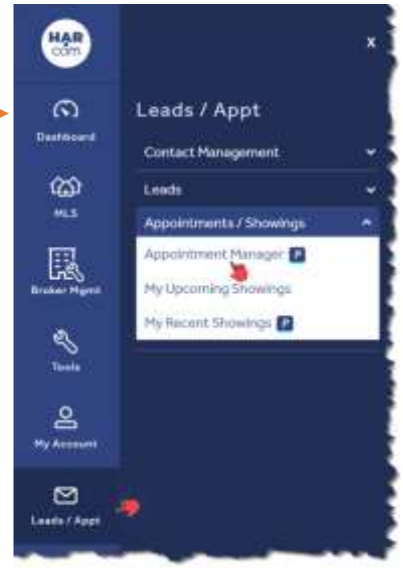
- HAR Technology Department needs to be contacted by the Brokerage Office to create initial Office setup and system access.
- At least one office contact needs to be defined as the System Administrator to complete the initial setup by HAR.
- The following 3 default users' roles are defined with the corresponding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



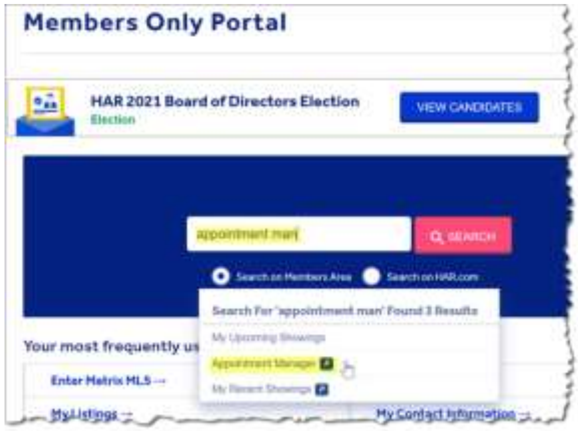


Note: there is a difference between System Administrator (can define user roles and change all system access) & Administrator Role (only has the rights defined above related to appointment, showing instructions, feedback, and reports).

Accessing Appointment Manager

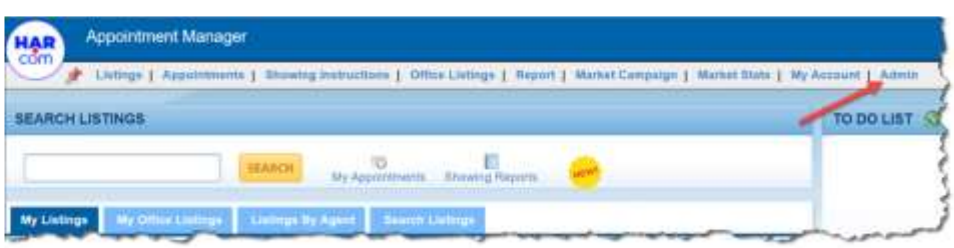


Selecting Leads / Appt from the Members Only Portal, provides a menu selection for Appointment Manager as shown on the right or from the Members Only Portal, begin typing Appointment Manager and your see a search results list appear, the click on Appointment Manager, as shown in the image:



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:

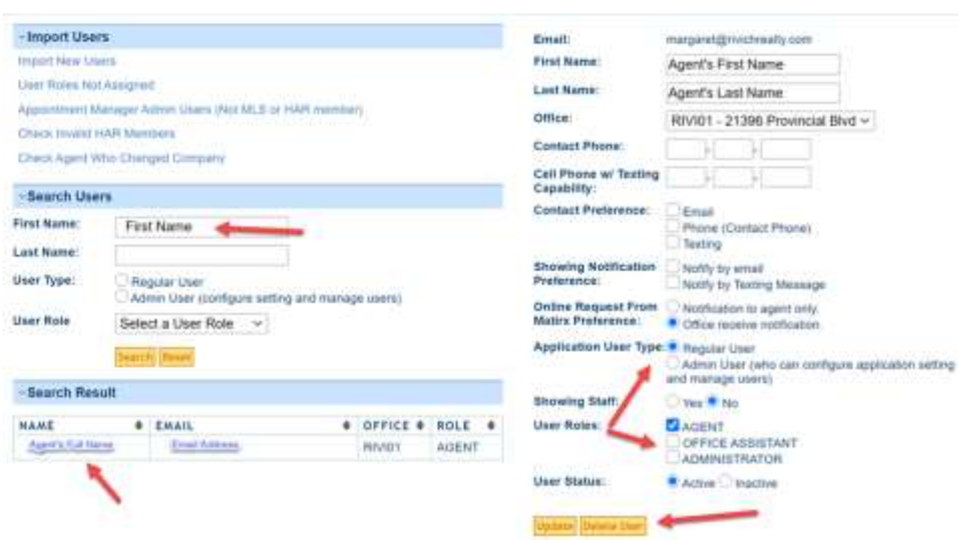


Adding Users

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 **<u>user role</u>** and **<u>user type</u>** for the import, as shown in the following image:

Note: The user type should be <u>Regular</u> user, and the roles should be <u>Agent</u>. 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:

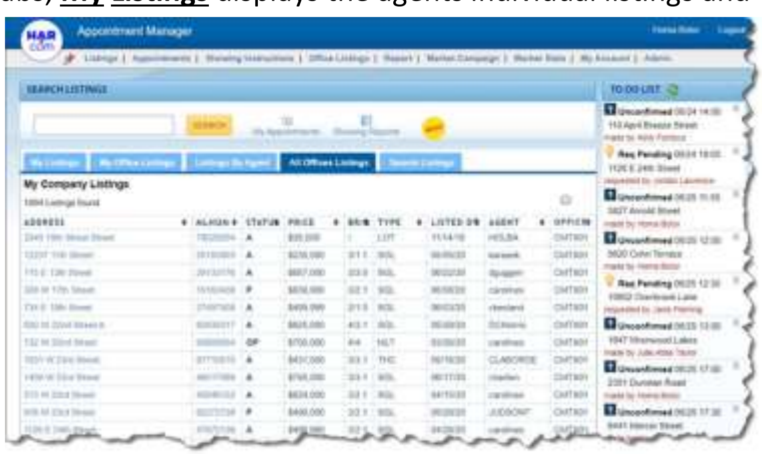


2. In addition to modifying the user type and role, other user setting options are:
    a. Modify Agent First and Last Name.
    b. Modify office the agent is working out of, in the rare case you will need to, this change only applies to the appointment manager system.
    c. Agent's Contact Number and Cell Phone number which accepts Text Messaging
    d. Contact Preference of agent Email, Phone, or text.
    e. Showing Notification Preference with regards to appointments, by email or text. This setting is important for listing agent. When a showing is scheduled, notifications will be sent to listing agent according to this setting.
    f. Online Request form recipients from Matrix to the Agent, or Office. If Office is the option selected, each agent has the ability to overwrite this open to be sent to Agent Only.
    g. Application User Type is either regular user or a system administrator
    h. Showing Staff is for agents defined as agent who are designated to perform "Accompanied Showings", typically for higher-end listings. My firms, the listing agent is the accompanying agent; however, other brokerages have dedicated agents for accompanied showings.
    i. User Role defines the access rights to the appointment manager functions and reports defined upon initial system setup or modified by system administrator.
    j. User Status is used to Activate or De-activate a user
    k. Lastly, Delete User. It is Okay to delete a user and import them back at any time.

Listings

Listing are automatically populated into the appointment manager system from Matrix, new listing will appear in the system approximately 20 minutes after it is entered into Matrix as an Active listing.

1. The Listing Menu Option has up to 5 Tabs, **__My__ __Listings__** displays the agents individual listings and **__My__ __Office__ __Listings__** displays the entire office listing as long as that access have been defined for the agent, this is typically assigned to the ***Office Assistant Role***. **__Listings__ __By__ __Agent__** list all listing agents for you brokerage office enabling the user to find listings quickly. **__All__ __Office__ __Listings__** displays all listings for a brokerage with multiple offices. **__Search__ __Listings__** tab allows user to search listings using some basic criteria.



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

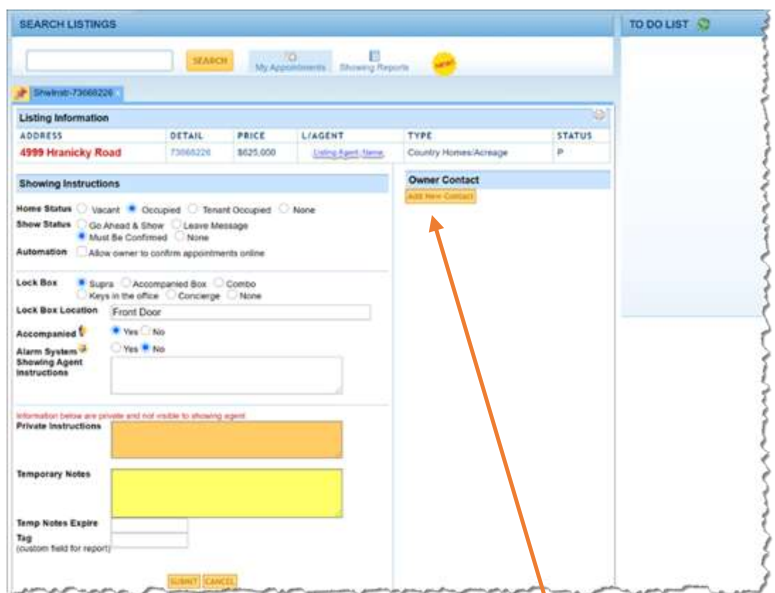
ADDRESS	MLNUM	STATUS	PRICE	BR/B	TYPE	LISTED DT	AGENT
82 Acres Acr 2213	78714316	A	$649,900	3/2.1	ACR	06/12/20	DMARKHAM
0 Bailey Road Road	84286210	A	$627,360	/.	ACR	02/20/18	JMaertz
TBD Bernardo	16880600	P	$686,400	/.	ACR	01/16/20	HEIDIHH
109 Black Road	21761017	A	$655,000	/.	ACR	05/22/18	lhegar
00 Bo 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	AJOHNSEY
00 County Road 230	77474882	A	$684,400	/.	ACR	07/12/19	ABURES

To Do List

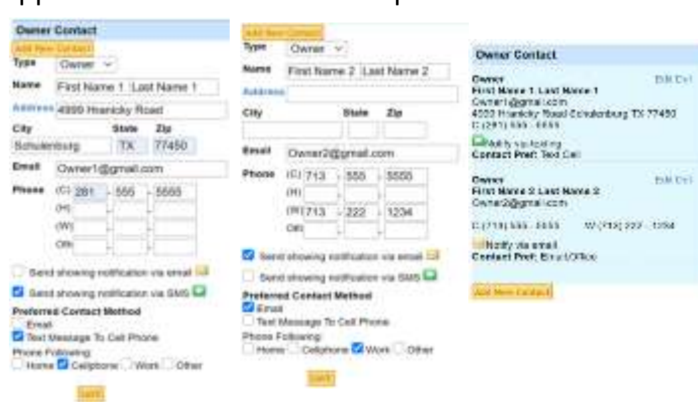
Appointment Manager designed for multi-tasking; it is tab based and you can have unlimited open tabs for all the concurrent task being performed. For example, an operator is waiting for confirmation form client and at same time receiving new request online or over the phone.

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



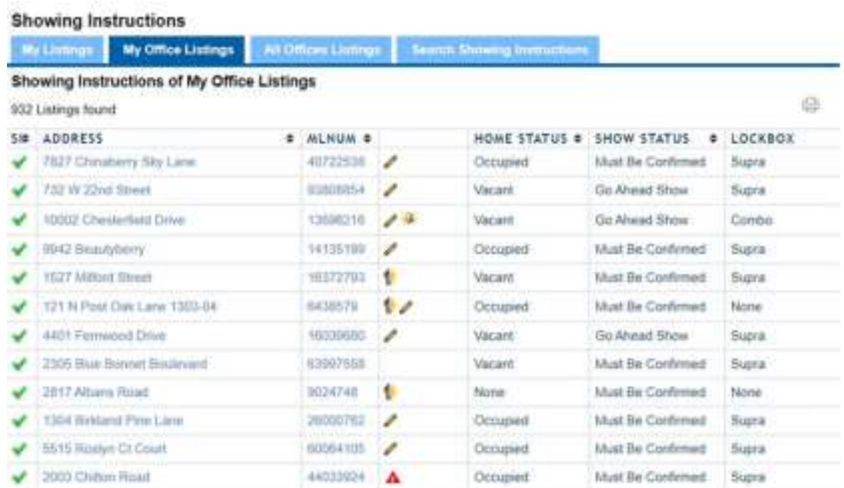
1. Each listing requires to have defined Showing Instructions to be able to schedule appointments. Clicking on the displayed listing, then selecting the Showing Instruction Option is how the showing details are entered, as shown in the following image to the right:
   a. Select the **<u>Home Status</u>** indicating if the home is <u>Vacant</u>, <u>Occupied</u>, <u>Tenant Occupied</u> or <u>None</u>.
   b. Select the **<u>Show Status</u>** indicating <u>Go Ahead & Show</u>, <u>Leave Message</u>, <u>Must Be Confirmed</u> or <u>None</u>.
   c. **<u>Automation</u>** 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:



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

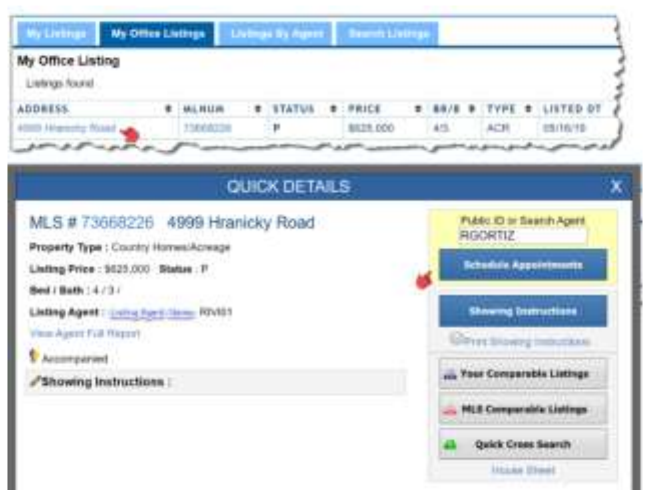
d. Select **<u>Lock</u> <u>Box</u>** indicating <u>Supra</u>, <u>Accompanied</u> <u>Box</u>, <u>Combo</u>, <u>Keys</u> <u>in</u> <u>the</u> <u>Office</u>, <u>Concierge</u>, or <u>None</u>.
e. Enter the **<u>Lock</u> <u>Box</u> <u>Location</u>**, for example front door, gas meter, back door, etc.
f. Indicate if **<u>Accompanied</u>** is requited with a <u>Yes</u> or <u>No</u> (typically for higher end or occupied homes with special conditions).
g. Indicate in an **<u>Alarm</u> <u>System</u>** is present with a <u>Yes</u> or <u>No</u> and any arming/disarming **<u>Showing</u> <u>Agent</u> <u>Instructions</u>**.
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 **<u>Showing</u> <u>Instructions</u>** menu option, then clicking on the **<u>My</u> <u>Office</u> <u>Listings</u>** tab. Each listing will display showing: <u>Green</u> <u>Check</u> means listings had Showing instructions, <u>Pencil</u> indicates listing contains notes, <u>Bell</u> alerts there is an alarm code, <u>People</u> <u>Image</u> indicats accompanied showing is required <u>Red</u> <u>Triangle</u> identifies there are temporary notes. See sample image to the right:



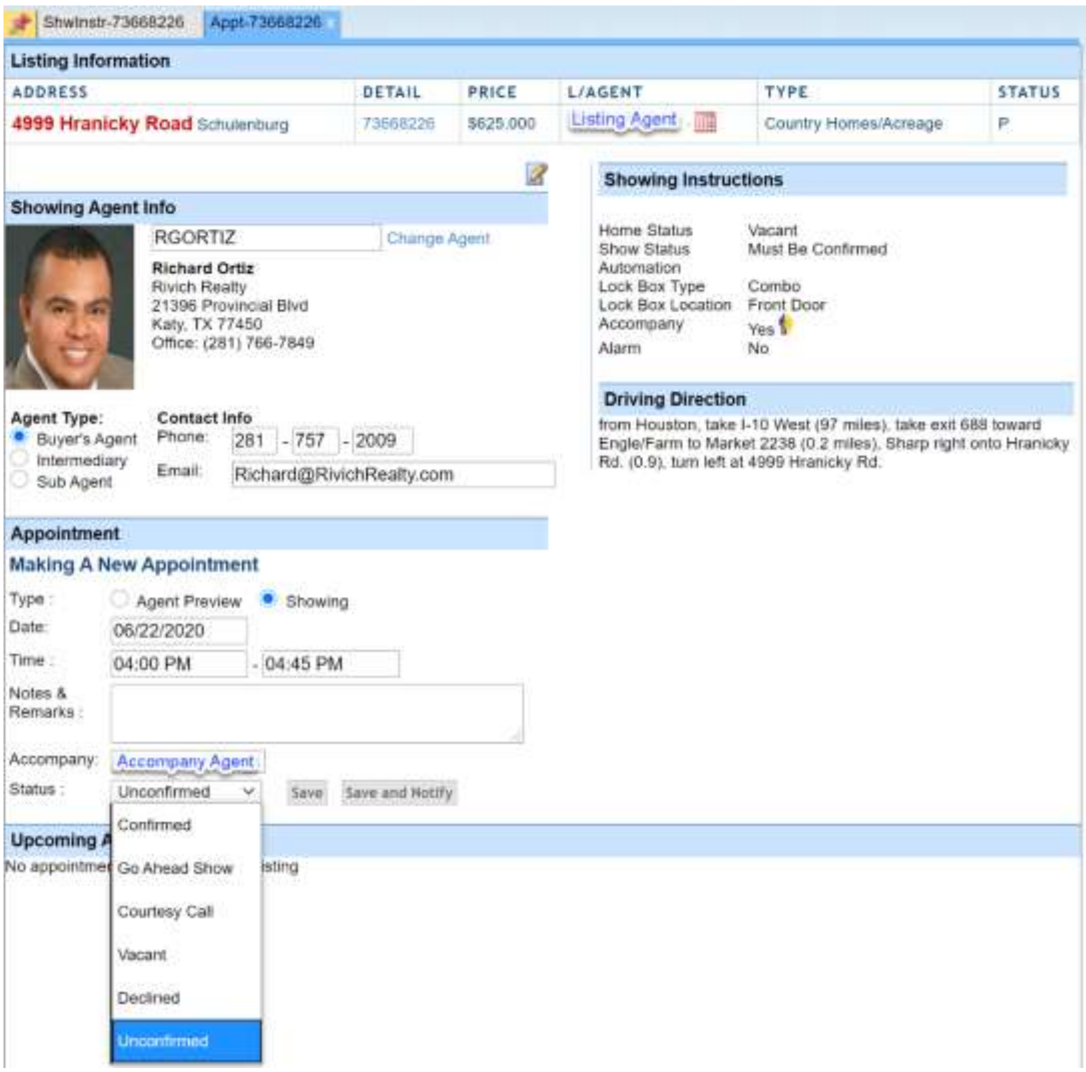
Appointment Processing

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



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 Stat 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:



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.

3. 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.

4. 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:

5. 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:

6. 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 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, reschedules or cancelled, showing agent and their office; as shown in the following image:

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.

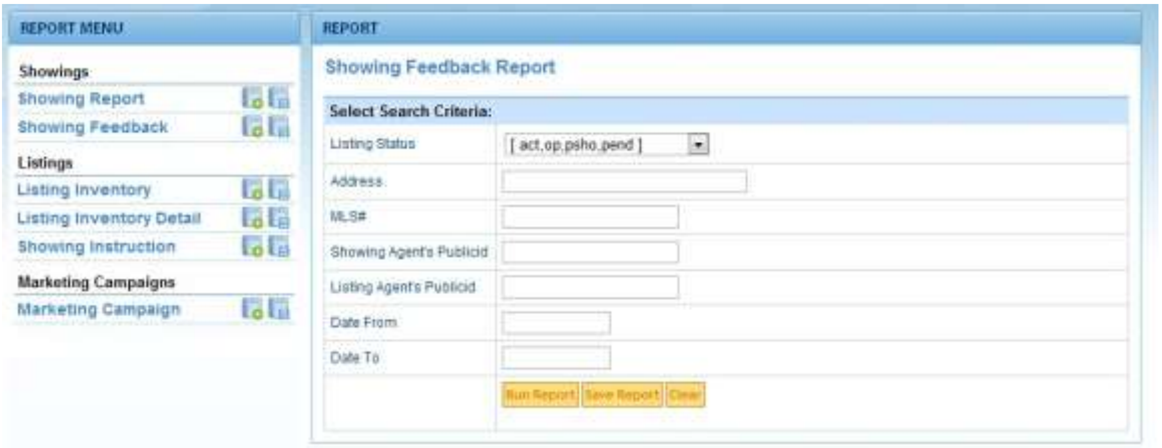
   Inventory Report Creator- Allows the user to select multiple criteria to search the company listings and produce a one-liner printed report based on these criteria.

   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:

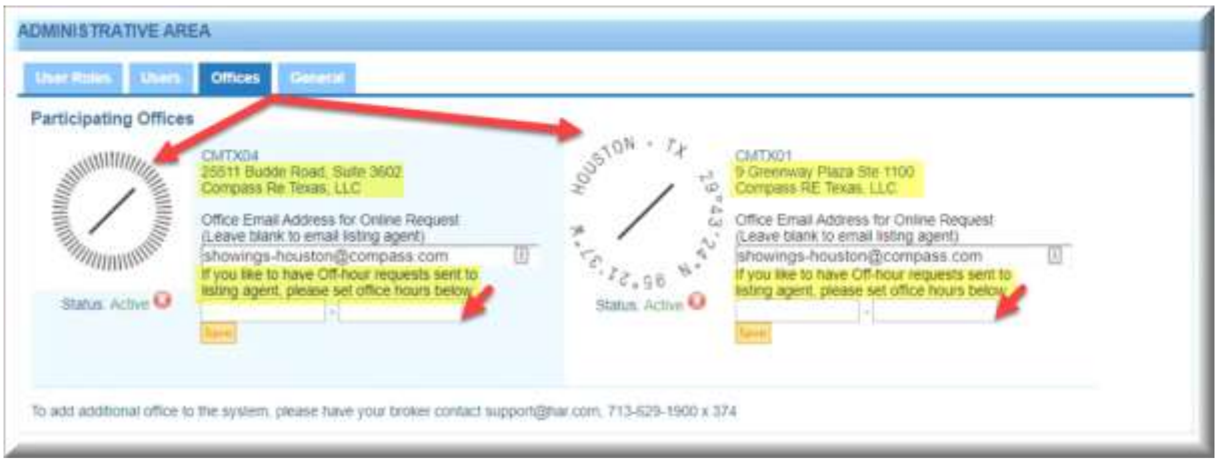
   - All reports can be downloaded as a PDF or Excel spreadsheet
   - Ad Hoc Report and Saved Report capabilities
   - Reports can be automatically generated on sent via email on a weekly basis
   - Saved Reports can be shared with entire office



Additional Administrative Settings

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

9. 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:



10. 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 to chooses to manage sending client rating invitations or for if to be handled by HAR, see following image: