I got my first client! – Key Takeaways

1) You can invite someone to the portal from your phone before you have a search and a subscription set up for them. You can give them a few days to generate data for you, then reach out to them and verify what they want THEN create a search and subscription either on your phone or on your computer.

   Full recorded webinar for Subscriptions and Portals:

   https://vimeo.com/1056110151

2) You can keep track of which houses you show by saving them into a listing collection. To do this, select some listings then click on Save in the upper right corner. Then click on Save Selected As to save them into a collection. If you add another one, do the same process but click inside the Collection Name box to find your already saved collection and make sure Add to Collection is selected before you click on Save. You can find your listing collections by typing in Listing Collections in the Quick Launch bar or just type in the name of the collection you are looking for.

3) You can also click on the button Work on Behalf Of when you are in a search, then choose your client. You can do the following for them: save, recommend, hide, and add notes to specific listings. Adding notes can be helpful after you have shown properties as they are saved in one central location.

4) Don't forget to check the Opt-In Status report to make sure your client is receiving the emails that the system sends them.

5) Print off a report in Market Summary for the city or neighborhood where your client is looking to buy so they can see trends for the last year.

   Full recorded webinar for Statistics 101:

   https://vimeo.com/1059015517