Admin Area

Outline of Features and Where to Find Them

Dashboard

- Dashboard contains calendar, activity chart, and statistics. It also shows the users important statistics such as closings YTD, last 12 months, and commission data (this can be set in the settings area).
- Dashboard also can display quick links (set in the user profile area) so the user can 1 click for items such as adding a new transaction.
- Dashboard has a very mobile friendly set up. If the user scrolls down, there are navigational menus to all areas of the Admin.

Transactions

- Enter new transactions
- Review and edit existing transactions
- Review all archived closed, cancelled, expired & withdrawn transactions.
- Enter commission data, sales data, contract data, & upload forms pertaining to the transaction.
- Electronically sign forms
- Get paid from closing forms auto-generated here
- Add / Edit Checklist—To-do / reminder items
- Track lockbox inventory

Leads

- Claim, view, and work leads
- Convert leads to customer for many more options
- View and work action plans
- View lead routing and broadcast details
- View, edit, work archived leads and blacklisted leads
- Update & edit lead rules for distribution
- Manage to-do items
- Import leads
- Manage property offers—offers come in via website

Customers

- View customer list along with details such as status and follow up dates
- Manually add customers / download CSV of customers
- Edit Buyer/Seller profiles
- View/Edit Drip listing settings (automatically send listings to customers)
- View customers liked listings and polls and message customers
- View customers drip listing history
- View customers activity and link to customers transactions
- View blacklisted customers
- Managed scheduled showings (from website or manually added)
- Testimonials—Add, edit, send and approve agent testimonials

Listings

- Provide a workable view of all listings
- Auto-creation of virtual tour
- Create SMS/Text message autoresponders for each listing
- Easily post listings on social media
- Print property flyers
- Auto-creation of landing pages for each listing
- Instant buyer match—see what agents in the brokerage have customers that match the listing criteria
- Add videos to a listing's website display

Documents

- Brokerage or personal documents can be stored/edited/downloaded

Website

- Add unlimited website pages & edit navigation menu
- Choose from many popular themes and edit website headers and content
- Lead generation and lead capture tools
- One click social media sharing
- Featured listings, featured from page listings, subdivision listings and searches, condo listings and searches, etc.
- Lead reply template
- Promotional capture—send a pdf document to leads
- Landing page settings
- Mobile them settings responsive or dedicated mobile theme
- Integrated blog system—show on your site and also brokerage site
- Roster
- Testimonials
- Fully integrated IDX so all listings display

Messaging

- Email Marketing Campaigns
- Interoffice messaging
- Notifications

Settings

- Brokerage settings
- Office settings
- Team settings
- Agent settings / Agent list
- Default transaction settings
- Email theme settings
- Lead rule settings

Reports

- Brokerage and agent reports
- Transaction reports
- Email campaign reports
- Conversion rates and lead reports (per agent or per brokerage)