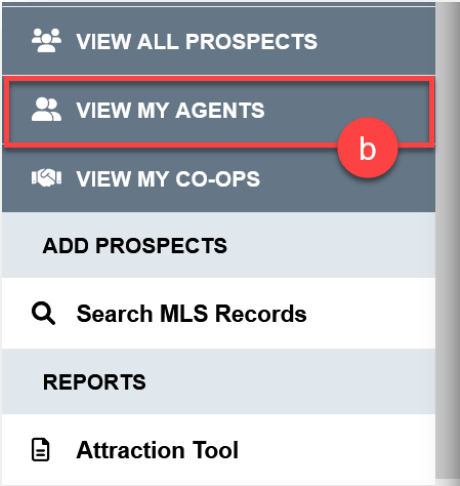
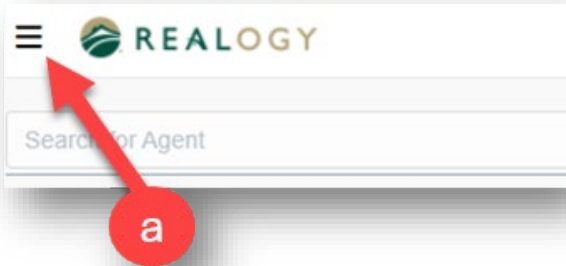


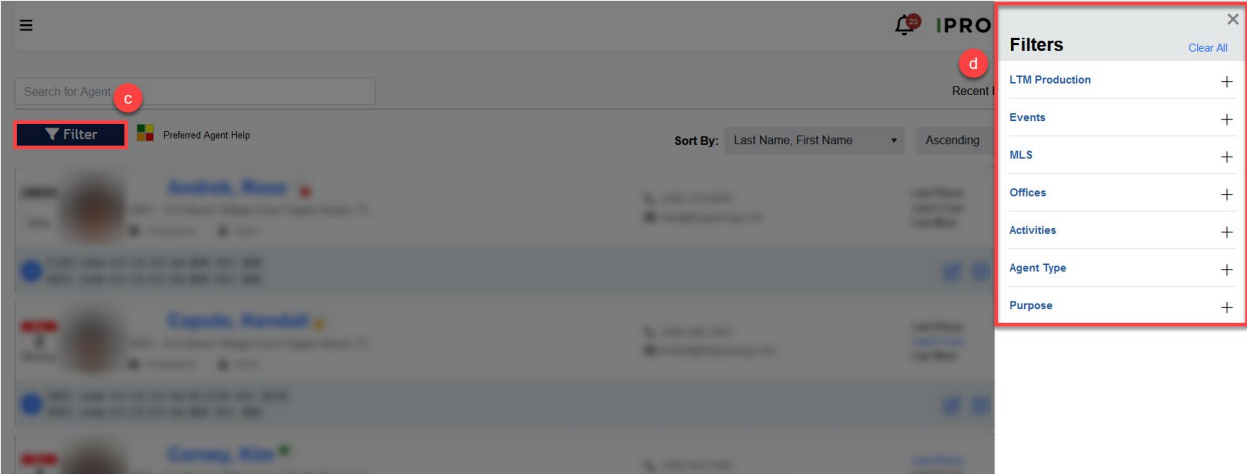
Filter Overhaul – View My Agents Screen

The filter panel on **View My Agents** has been redesigned to include new enhancements, allowing you to select various criterion to quickly find agents on your list. There are brand new filter options, as well as updates to existing filter options.

- To access the enhanced filter panel:
- a. Click **menu** to expand the left-hand side menu panel.
 - b. Click **View My Agents**.



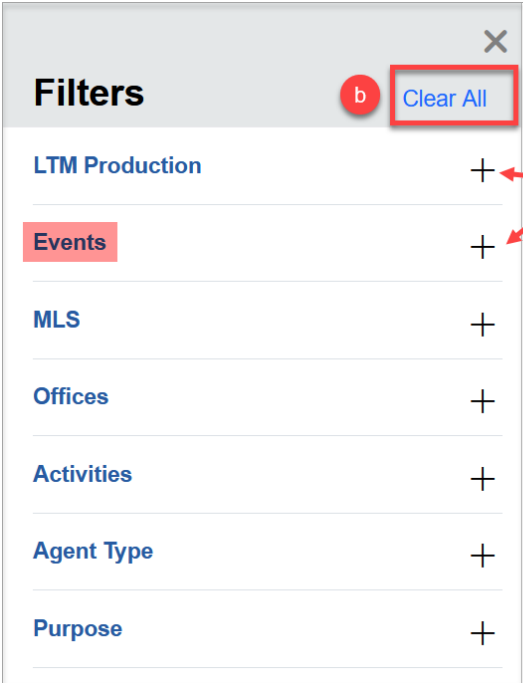
- c. From the **View My Agents** screen, click the blue **Filter** button.
- d. The **Filters** panel will open, overlaying the **View My Agents** screen.



Overview of Filter Panel

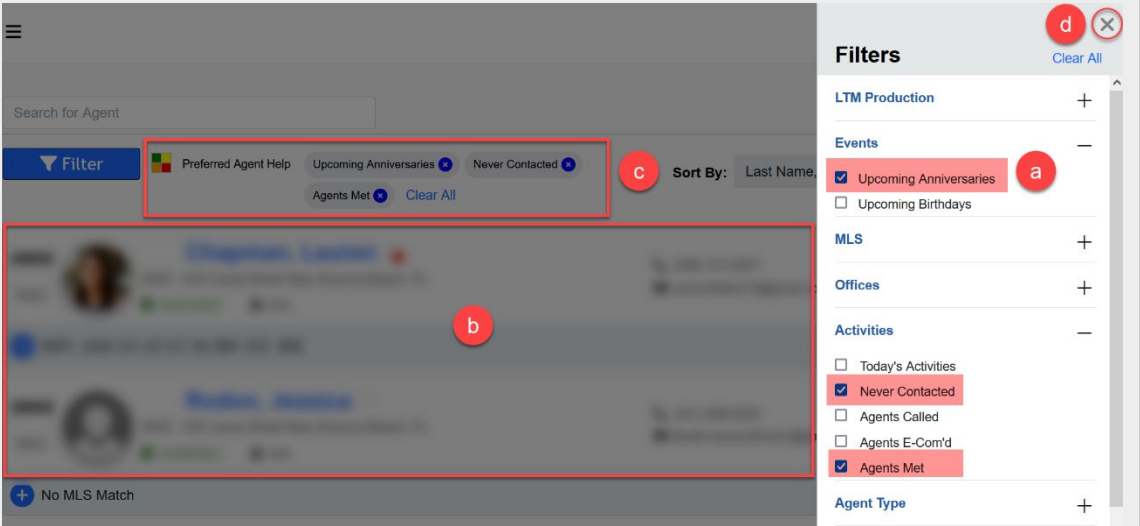
Existing filters within the panel have been reorganized. There are also brand-new filters available.

- a. The **Filters** panel consists of multiple collapsible sections. Click the + button, or on each filter header, to expand the section.
- b. Click the **Clear All** Button to clear all your selections.



Overview of Filter Panel (Cont'd.)

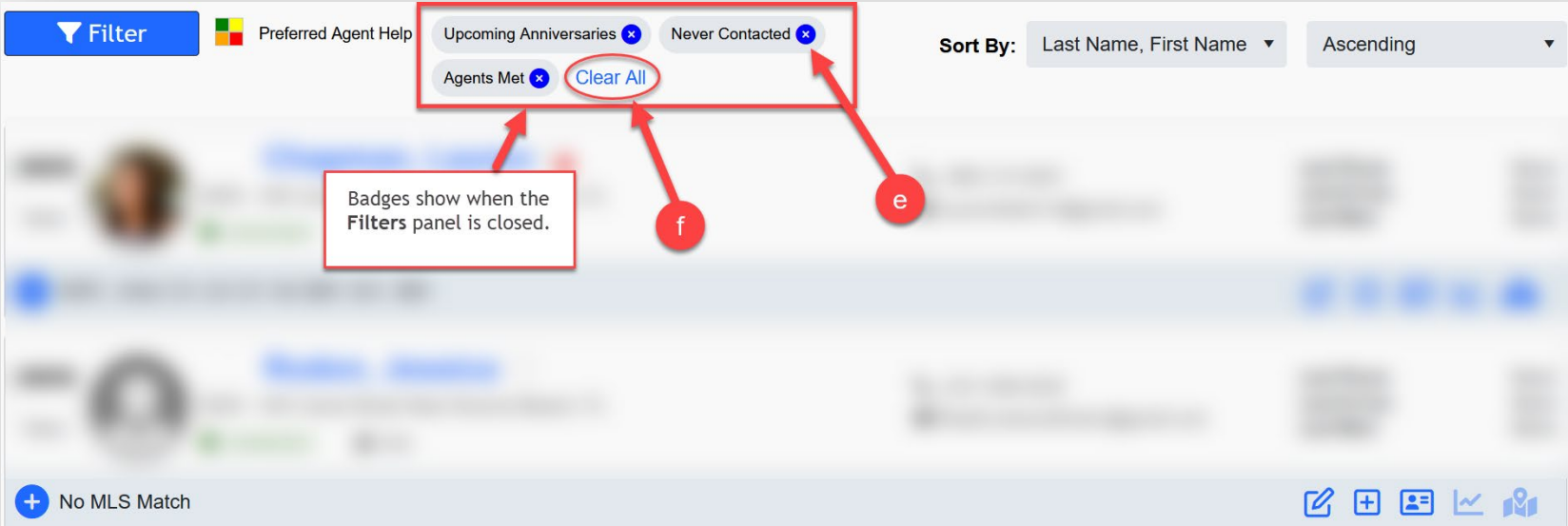
- a. Select filter options from the panel, by either clicking the checkbox, or moving the slider bar.
- b. As you select different options, the results are immediately displayed in the current agent list.
- c. Badges appear on the **View My Agents** screen, as you check/select search options.
- d. Once you have selected all your filter options, click the **X** to close the **Filters** panel.



With the **Filters** panel now closed, you can see your agent results.

NOTE: These badges are a reminder that you are not seeing the full selection of agents, only the agents that fit the search criteria you selected from the **Filters** panel.

- e. Click the **X** on any of the badges to remove a specific filter criterion.
- f. Click **Clear All** to return to the full agent list.

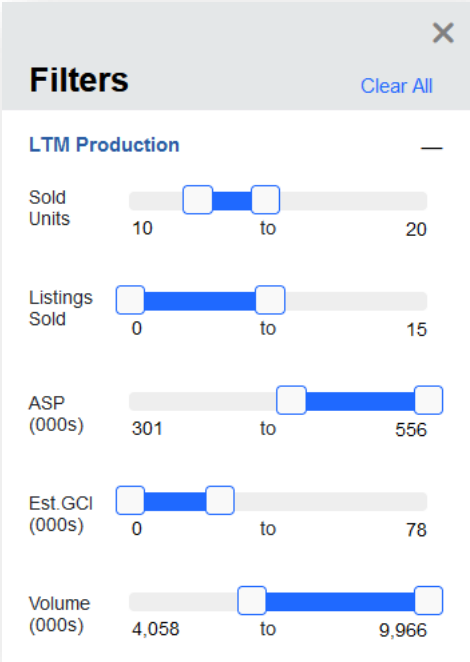


NEW/UPDATED FILTER OPTIONS

LTM Production (New)

This is a new filter option, with more selections available. Previously, only **Units** and **ASP** were included. This filter option now has slider bars.

Note: The maximum value on the sliders comes directly from the values in the current agent list.



Events (Existing - Updated)

You can select to filter agents by:

- Upcoming anniversaries
- Upcoming birthdays

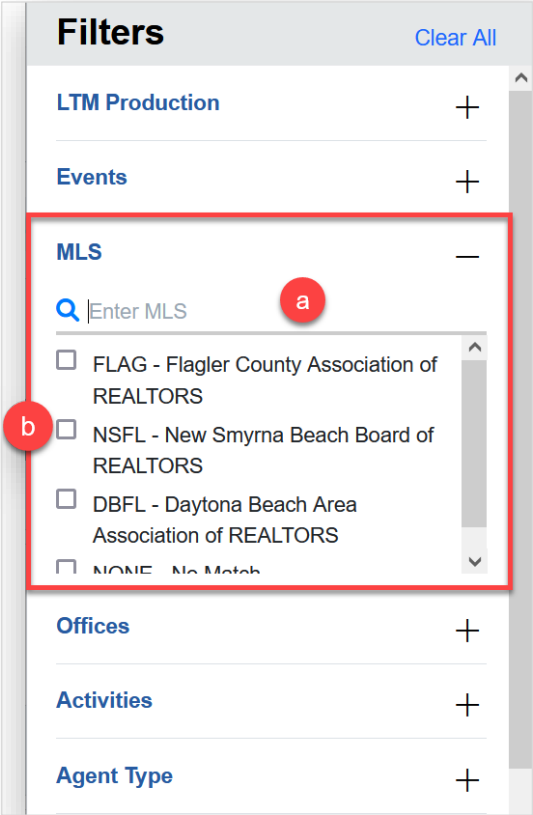
Filters [Clear All](#)

LTM Production	+
Events	-
<input type="checkbox"/> Upcoming Anniversaries	
<input type="checkbox"/> Upcoming Birthdays	
MLS	+
Offices	+
Activities	+
Agent Type	+
Purpose	+

MLS (New)

The searchable MLS values come directly from the current agent list.

- a. You can either type the name of the MLS in the search bar,
- b. Or scroll and select the required MLS from the list.



Offices (Existing – Updated)

You can filter by an agent’s office.

- a. You can either type the name of the office in the search bar,
- b. Or scroll and select the required office from the list.

Filters Clear All

LTM Production +

Events +

MLS +

Offices -

🔍 Enter Office a

0001 - Flagler Beach, FL b

0003 - New Smyrna Beach, FL

Activities +

Agent Type +

Purpose +

Activities (Existing – Updated)

Options to select include:

- Today’s Activities
- Never Contacted
- Agents Called
- Agents E-Com’d
- Agents Met

Reminder: Each time you select a filter option, the results update automatically in the **View My Agents** screen as you are selecting different options.

Filters Clear All

- LTM Production +
- Events +
- MLS +
- Offices +
- Activities** -
 - Today's Activities
 - Never Contacted
 - Agents Called
 - Agents E-Com'd
 - Agents Met

Filter Preferred Agent Help Agents Called x Agents E-Com'd x Clear All

This screen updates continuously as you select different filter options.

+ DBFL Units: 5.0 LS: 3.0 Vol: \$1,916K GCI: \$50K
 NSFL Units: 0.0 LS: 0.0 Vol: \$0K GCI: \$0K

Agent Type (New)

You can select to filter by:

- Recent Producers, or
- Preferred Agents.

You can also select which tier of Preferred Agent you would like to filter by.

Filters Clear All






Events +

MLS +

Offices +

Activities +

Agent Type —

- Recent Producers
- Preferred Agent
 -  Tier 1
 -  Tier 2
 -  Tier 3
 -  Tier 4
 -  No MLS Match

Purpose +

Purpose (New)

You can select to filter by purpose:

- a. By Activity, or
- b. By Next Activity

Filters Clear All

LTM Production +

Events +

MLS +

Offices +

Activities +

Agent Type +

Purpose —

Activity **a** —

- Business Planning (BP)
- Learning Activity (LA)
- Coaching Activity (CA)
- Touch Base (TB)
- Other (O)

Next Activity **b** —

- Business Planning (BP)
- Learning Activity (LA)
- Coaching Activity (CA)
- Touch Base (TB)
- Other (O)