

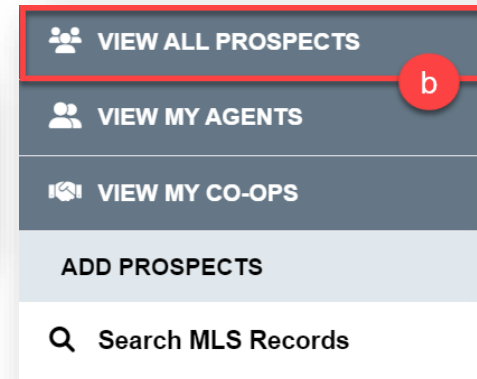
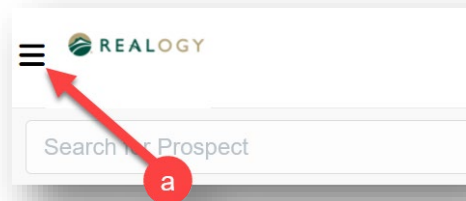
Filter Overhaul – View All Prospects Screen

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

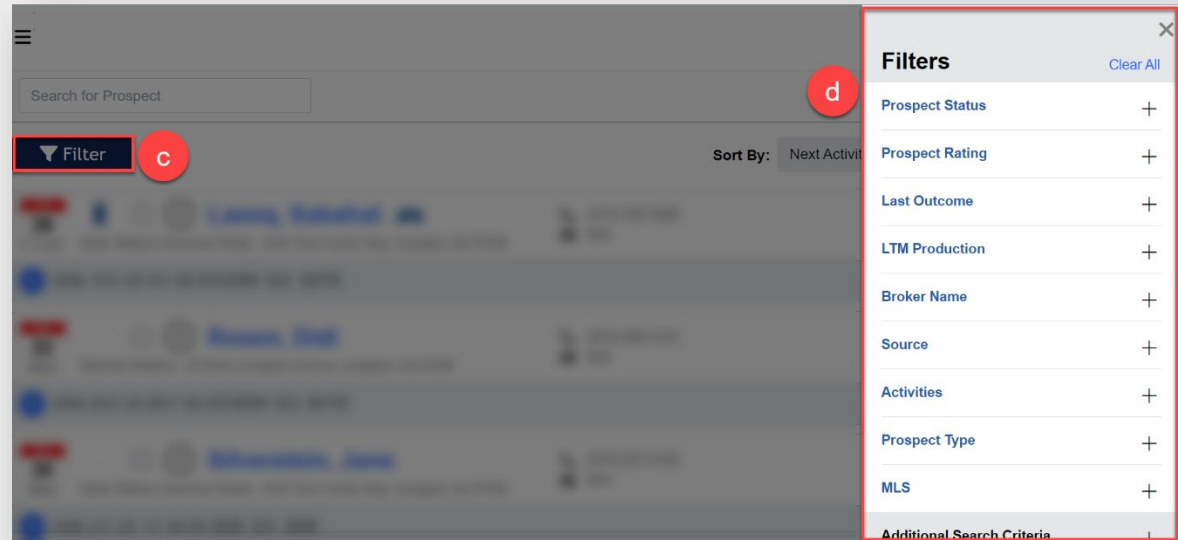
NOTE: There are filter options exclusive to RBG. These will be highlighted in **yellow**.

To access the enhanced filter panel:

- a. Click **menu** to expand the left-hand side menu panel.
- b. Click **View All Prospects**.



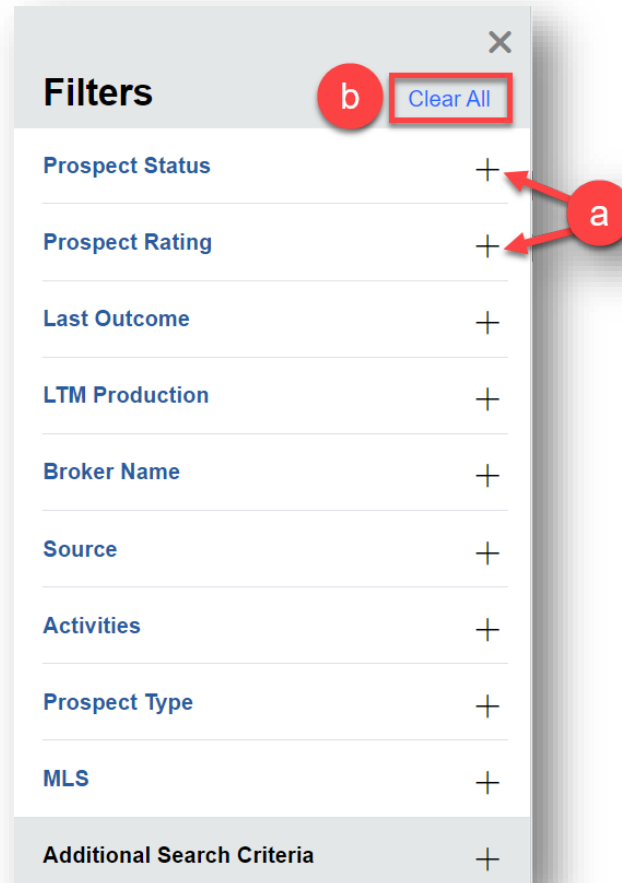
- c. From the **View All Prospects** screen, click the blue **Filter** button.
- d. The **Filters** panel will open, overlaying the **View All Prospects** screen.



Overview of Filter Panel

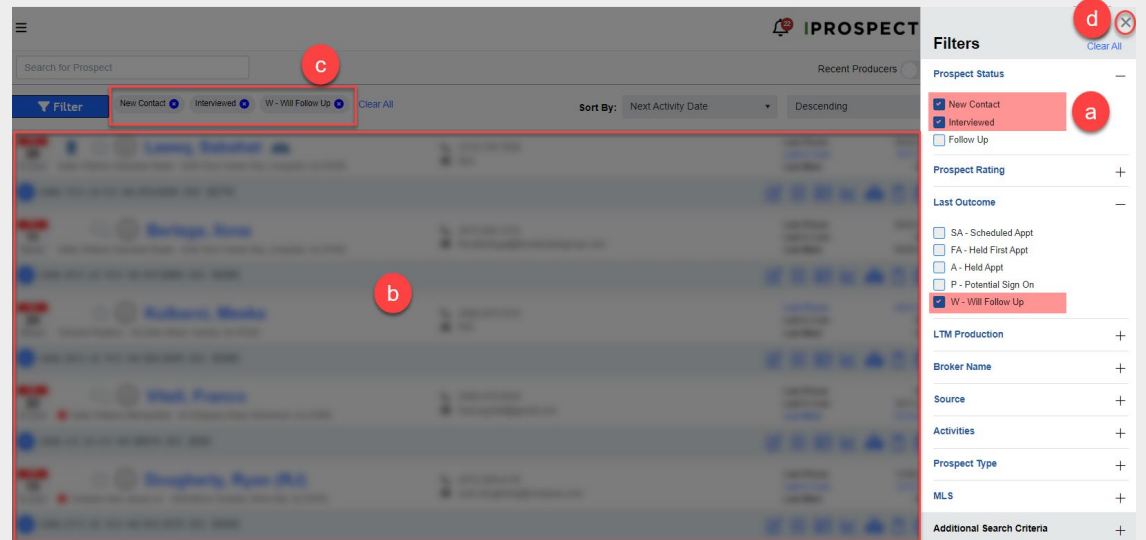
Existing filters within the panel have been reorganized. There are also brand-new filters available.

- 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.)

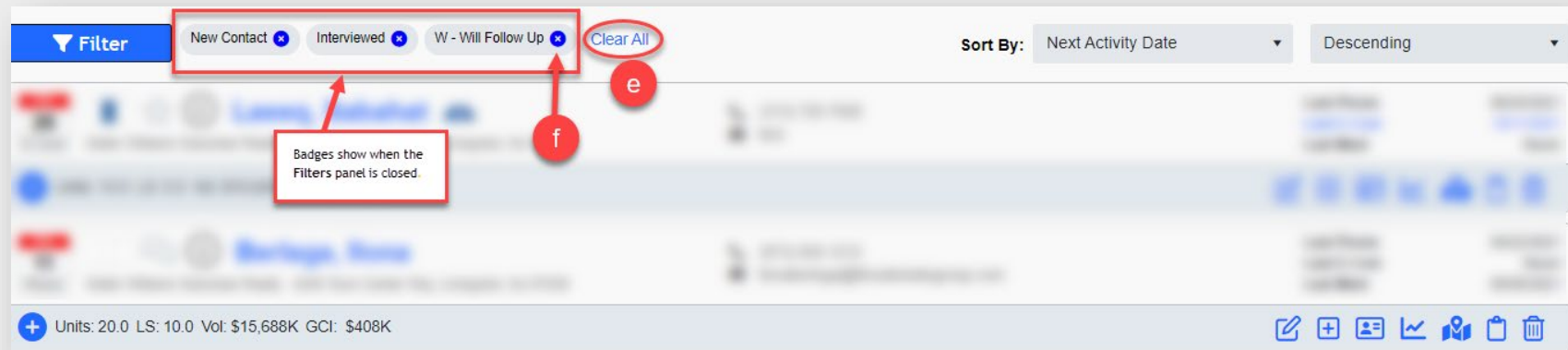
- Select filter options from the panel, by either clicking the checkbox, or moving the slider bar.
- As you select different options, the results are immediately displayed in the current prospect list.
- Badges appear on the **View All Prospects** screen, as you check/select search options.
- Once you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



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

NOTE: These badges are a reminder that you are not seeing the full selection of prospects, only the prospects 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 prospect list.



NEW/UPDATED FILTER OPTIONS

Prospect Status (Existing)

You can select to filter by:

- New Contact
- Interviewed
- Follow Up

Prospect Status

- New Contact
- Interviewed
- Follow Up

Prospect Rating (Existing)

You can select to filter by prospect rating:

- 30 days or less
- 31 to 60 days
- 61 to 90 days
- 91 to 180 days
- Prospect

Prospect Rating

- 1 30 Days or less
- 2 31 to 60 Days
- 3 61 to 90 Days
- 4 91 to 180 Days
- 5 Prospect

Last Outcome (Existing)

You can select to filter by:

- SA – Scheduled Appt
- FA – Held First Appt
- A – Held Appt
- P – Potential Sign On
- W – Will Follow Up

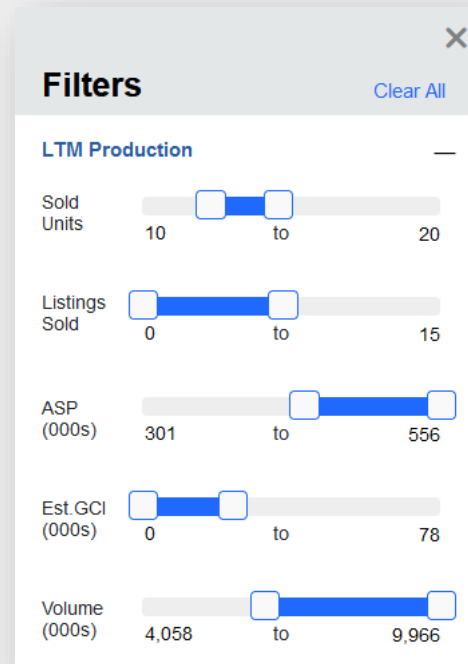
Last Outcome

- SA - Scheduled Appt
- FA - Held First Appt
- A - Held Appt
- P - Potential Sign On
- W - Will Follow Up

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.

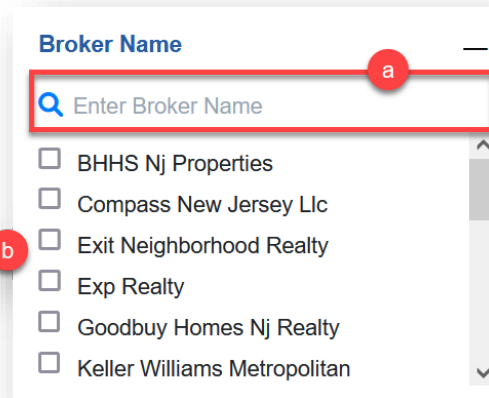
Note: The maximum value on the sliders comes directly from the values in the current prospect list.



Broker Name (New)

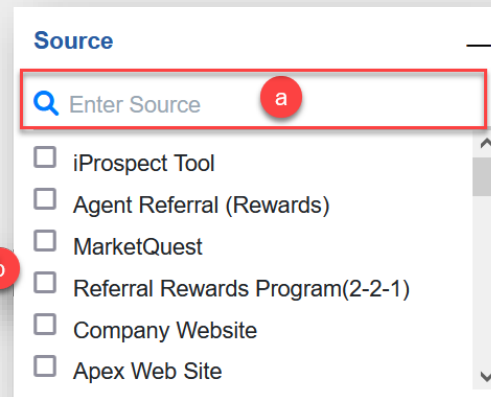
You can filter a prospect by their broker name. The searchable broker name values comes directly from the current prospect list.

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

**Source (New)**

The searchable prospect source values are the same as in the **Prospect Profile**.

- You can search by either typing the source in the search bar,
- Or scrolling and selecting the required source from the list.



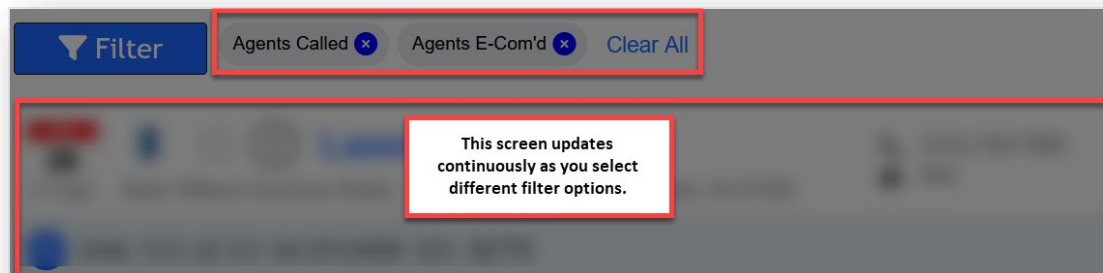
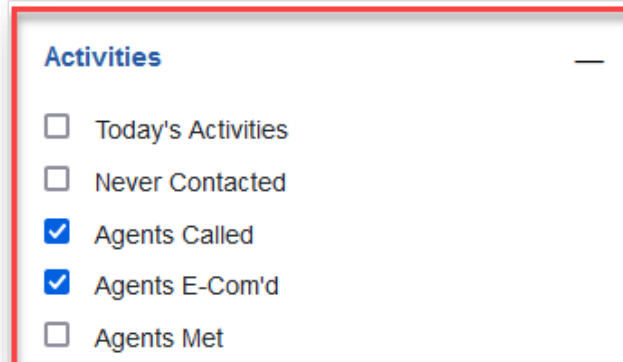
Activities (Existing – Updated)

These are the values previously found in the **Quick Filter** popup.

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 All Prospects** screen as you are selecting different options.



Prospect Type (New)


You can select to filter by:


- Recent Producers, or
- The APEX rating of the prospect
- Manually added
- MLS Added
- Co-Op


Prospect Type —


Recent Producers

APEX —

 Quartile 1

 Quartile 2

 Quartile 3

 Quartile 4

Manually Added

MLS Added

Co-Op

TARP (New) RBG Only

You can search for prospect based on TARP activities.

- Offer Made
- Offer Accepted
- Offer Declined

TARP —

Offer Made

Offer Accepted

Offer Declined

Shared Prospect Lists (New)

This filter option is related to the Inter Office Visibility feature.

NOTE: This filter will only appear if another user has granted you access to their list.

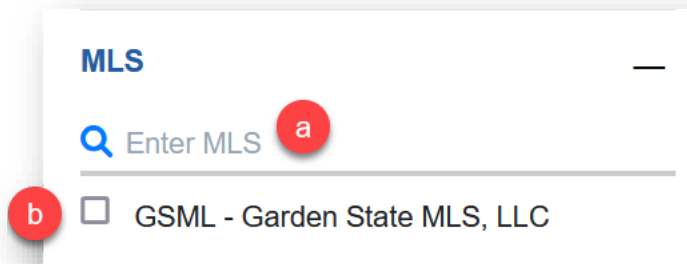


A screenshot of a filter dropdown menu. At the top, there is a search bar with a magnifying glass icon and the text "Enter User". Below the search bar, there are two list items, each with a square checkbox on the left: "My List" and "Doe, John".

MLS (New)

The searchable MLS values come directly from the current prospect 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.



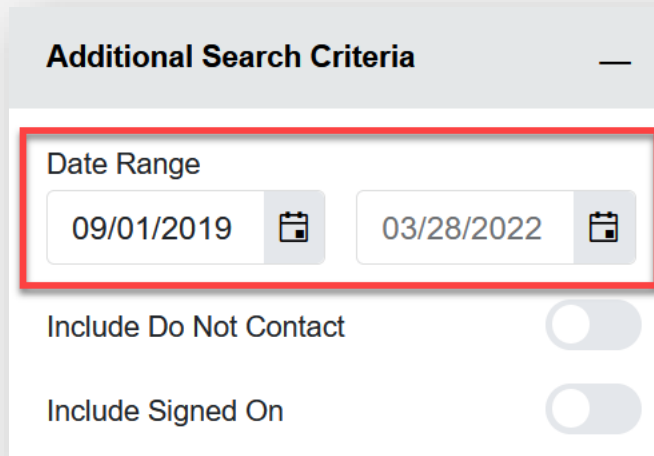
A screenshot of a filter dropdown menu titled "MLS" in blue. It features a search bar with a magnifying glass icon and the text "Enter MLS", with a red circle labeled "a" next to it. Below the search bar, there is one list item with a square checkbox on the left: "GSML - Garden State MLS, LLC", with a red circle labeled "b" next to the checkbox.

Additional Search Criteria

Occasionally you may want to review prospects within a different date range or prospects marked as **Do Not Contact** or **Signed On**.



Click on **Additional Search Criteria** at the bottom of the Filters panel. Changing these values will change the underlying result of the prospect list.

NOTE: The default date range is approximately a rolling 18-month period prior to the current date and default options for **Do Not Contact** or **Signed On** are toggled off.



Additional Search Criteria

Date Range

09/01/2019  03/28/2022 

Include Do Not Contact

Include Signed On

Additional Search Criteria (Contd.)

- a. When **Do Not Contact** or **Signed On** toggles are switched on,
- b. The **Last Outcome** filter will change to include the new values.

You can now select these options to filter your prospects.

Additional Search Criteria

Date Range

09/01/2019 03/28/2022

Include Do Not Contact a

Include Signed On

Last Outcome

SA - Scheduled Appt

FA - Held First Appt

A - Held Appt

P - Potential Sign On

W - Will Follow Up

X - Do Not Contact b

S - Signed On