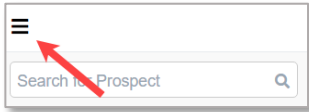
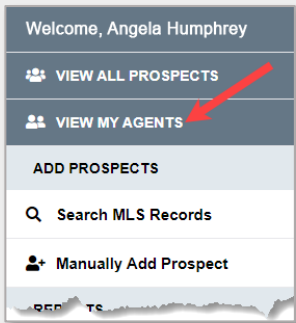


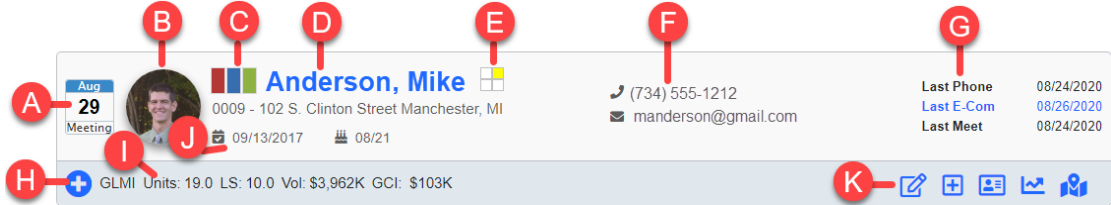












View My Agents

The View My Agents screen displays all the agents within an office. From this screen, you can add retention activities, track agent's recent production, birthdays and anniversaries, and view their estimated volume growth.

Accessing the View My Agents screen

<p>1. Click the Menu icon.</p>	
<p>2. From the menu click View My Agents.</p>	

Defining Parts of the View My Agents Screen

<p>These screen parts are defined below:</p>									
<p>A. Next Activity Date This icon shows the next date when an activity is scheduled. It also reports what the type of next activity is (Phone, Meet, Email, Text).</p>	<table border="1"> <tr> <td data-bbox="716 1252 1031 1349">  </td> <td data-bbox="1031 1252 1346 1349">  </td> <td data-bbox="1346 1252 1661 1349">  </td> <td data-bbox="1661 1252 1976 1349">  </td> </tr> <tr> <td data-bbox="716 1349 1031 1388"> <p>Red=Overdue Date</p> </td> <td data-bbox="1031 1349 1346 1388"> <p>Green=Today</p> </td> <td data-bbox="1346 1349 1661 1388"> <p>Blue=Future Date</p> </td> <td data-bbox="1661 1349 1976 1388"> <p>Grey=No Date Set</p> </td> </tr> </table>					<p>Red=Overdue Date</p>	<p>Green=Today</p>	<p>Blue=Future Date</p>	<p>Grey=No Date Set</p>
									
<p>Red=Overdue Date</p>	<p>Green=Today</p>	<p>Blue=Future Date</p>	<p>Grey=No Date Set</p>						

Defining Parts of the View My Agents Screen (continued)

These screen parts are defined below:

The screenshot shows the agent profile for Mike Anderson. Callout letters A through K identify the following elements:

- A:** Meeting icon
- B:** Agent photo
- C:** Address (0009 - 102 S. Clinton Street Manchester, MI)
- D:** Agent name (Anderson, Mike)
- E:** MLS status icon
- F:** Phone number ((734) 555-1212) and email (manderson@gmail.com)
- G:** Last Phone (08/24/2020), Last E-Com (08/26/2020), and Last Meet (08/24/2020) dates
- H:** GLMI Units (19.0), LS (10.0), Vol (\$3,962K), and GCI (\$103K)
- I:** Meeting date (09/13/2017)
- J:** Meeting time (08/21)
- K:** Action icons (edit, add, list, etc.)

B. Agent Photo

This photo is auto populated from the dash application.

**C. Recent Production**

If the agent had production in the last 7 days, the appropriate bar is shown with color. Clicking any of the bars opens the 30-Day Production Detail screen.

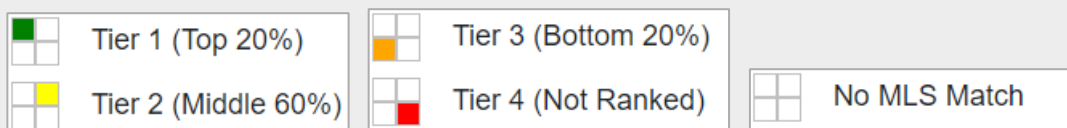
**D. Agent Name**

Click the agent's name to see their Prospect Profile page with detailed information about the agent.

Anderson, Mike

E. Preferred Agent

The Preferred Agent data is calculated quarterly within the agent's MLS. Those in a higher tier are expected to have better volume growth in the next 3 years.

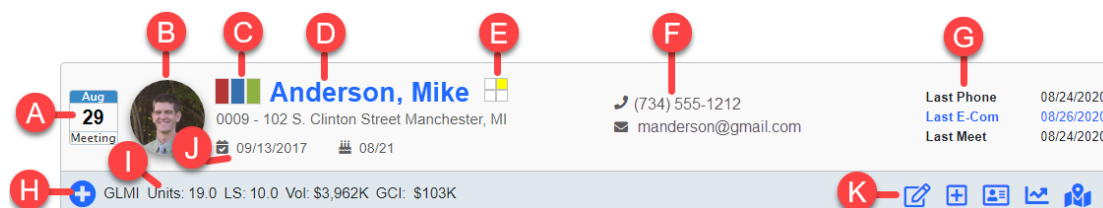
**F. Phone Number and Email**

The agent's phone number and email are auto populated from the information entered in the dash application. This information can be updated within iProspect using the Edit Agent screen.

(734) 555-1212
manderson@gmail.com

Defining Parts of the View My Agents Screen (continued)

These screen parts are defined below:

**G. Last Contact Date**

The date of the last phone call, email, and meeting are reported here. The most recent date is highlighted in blue.

Last Phone	08/24/2020
Last E-Com	08/26/2020
Last Meet	08/24/2020

H. Expand Icon for Recent Activities

Click the plus sign to expand the agent's card to display the last five activities you've entered for this agent.

**I. Recent (LTM Production)**

This agent's recent production is listed here including: the MLS, and data from the Last 12 Month's Total Units, Listings Sold, Volume and Estimated GCI.

GLMI Units: 19.0 LS: 10.0 Vol: \$3,962K GCI: \$103K

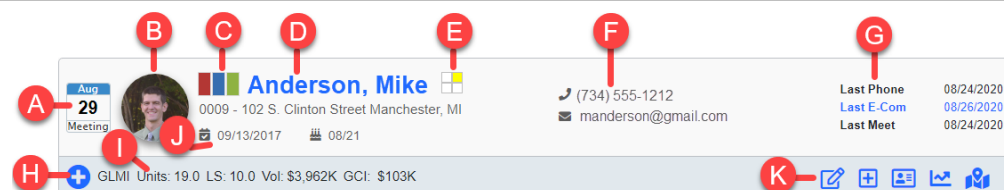
J. Anniversary and Birthdate

The agent's anniversary with the company is auto populated from dash. The agent's birthday does not automatically appear but can be edited from using the Edit Agent screen. It reports only the month and day, not the year.

Anniversary	Birthday
📅 09/13/2017	📅 08/21

Defining Parts of the View My Agents Screen (continued)

These screen parts are defined below:



K. Icon Set






Edit Agent – Click to edit the Agent’s phone number, email or birthday and to add general notes on this agent.

Add Activity – Click to add an activity for this agent and plan a next activity. The Purpose field on the agent card includes retention-type activities.

Create Contact Card – Click to email contact information which can be imported to your contact software.

View Production Graph – Click to view a graph with listings taken, sold units and sold volume over the past several years.

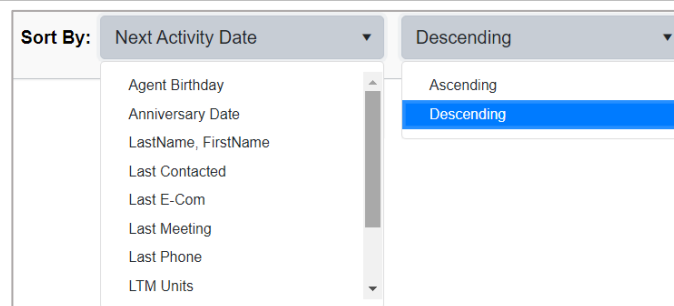
View Production Map – Click to view a Google map showing production for the last 12 months or year to date.

				
Edit Agent	Add Activity	Create Contact Card	View Production Graph	View Production Map

Sorting the View My Agents screen

The default sort order for the View My Agents Screen is by **Next Activity Date** in **Descending** order. To change the sort order, use the **Sort By** menus.

1. The first **Sort By** menu allows you to choose the field to sort by
2. The second **Sort By** menu allows you to choose Ascending or Descending order.



Filtering the View My Agents Screen

1. In the upper left corner, click the **Filter** button.

Note: If you only want to filter by Production, you can also click the **Recent Producers** toggle on the dashboard. See the next section for more information on focusing on Production.

Recent Producers



2. The **Agent Filters** menu appears on the right side of the screen, choose from these options to filter:
 - A. Enter **numbers** for the production.
 - B. Click the **toggle(s)** for the available filters.
 - C. Click the **Close** box to apply the filter.
 - D. Click **Reset** to remove all filters.

Note: You can apply multiple filters.

The screenshot shows the 'Agent Filters' menu with the following sections and options:

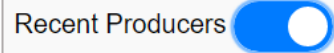
- Production** (dropdown arrow):
 - Units: 0 to 999 (with up/down arrows)
 - ASP (000's): 0 to 9,999 (with up/down arrows)
- Events** (dropdown arrow):
 - Recent Producers: (Callout B)
 - Upcoming Anniversaries:
 - Upcoming Birthdays:
- MLS** (dropdown arrow):
 - Great Lakes Repository:
 - Michigan Regional Information Center, LLC:
 - No Match:
- Offices** (dropdown arrow):
 - 0008 - Saint Joseph, MI:
 - 0001 - Jackson, MI:
- Activities** (dropdown arrow):
 - Today's Activities:
 - Never Contacted:
 - Agents Called:
 - Agents E-Com'd:
 - Agents Met:

Callout boxes: C points to the close icon (X) in the top right of the menu; D points to the 'Reset' link; A points to the 'Units' and 'ASP' input fields; B points to the 'Recent Producers' toggle.

Filtering the View My Agents Screen by Recent Producers and Sending a Congratulatory Email

1. In the upper right corner, click the **Recent Producers** toggle.

The only agents displayed have had production in the last 7 days.



Note: You can also click the **Filter** button and choose **Recent Producers** in the Events section.

2. Click on any of the colored Production boxes to see the last 30-day production Detail screen.

- **Red** – Last Sale
- **Blue** – Last Contract
- **Green** – Last Listing



3. To send a congratulatory email, click on the **email icon** ✉ in the Actions column.

30 Day Production Detail
Solds, Contracts and Listings

*(Single Family Home, Townhome, Land, Mobile, Multi-family Home, Commercial, C

Recent Week's Activity: ■ Sale ■ Contract ■ Listing

Page: 1 to 10 of 24 Total Per Page

Actions	Sts	Type*	Address	City	Zip	Listed	List Price	Contract	Sold	Sale Price
	A	M	115 Walnut St	Bloomfield	07003	8/21/20	350,000			0
	P	S	510 Dinah Rd	Roxbury Twp	07850	8/4/20	350,000	9/1/20		350,000
	S	S	77 Kim Ln	Washington Twp	07853	6/15/20	650,000	7/6/20	8/17/20	650,000
	A	S	349 Fairview Avenue	Washington Twp	07853	8/26/20	600,000			0
	S	T	10 Trailwood Dr	Mount Arlington	07856	5/8/20	432,000	7/28/20	8/28/20	426,000

4. Edit the email as needed and click **Send**.

E-mail Agent ✕

To:

Cc:

Bcc:

Subject:

Email Body

(inherited font) (inherited size) **B I U A**

Dear Mike,
 Congratulations on 1244 Ficus Dr. in Myrtle Beach which contracted on 1/30/20 with a listing price of \$339,500.
 Sincerely,
 Sandy Smith
 AB Real Estate

Automatically log activity

5. Once you click **Send**, you will be brought back to the production detail page.

As confirmation, you will see that the email icon disappears. This is to prevent you from sending a duplicate email for that transaction.

30 Day Production Detail

Solds, Contracts and Listings

**(Single Family Home, Townhome, Land, Mobile, Multi-family Home, Commercial, C*

Recent Week's Activity: ■ Sale ■ Contract ■ Listing

Page: 1 to 10 of 24 Total Per Page

Actions	Sts	Type*	Address	City	Zip	Listed	List Price	Contract	Sold	Sale Price
	A	M	115 Walnut St	Bloomfield	07003	8/21/20	350,000			0
	P	S	510 Dinah Rd	Roxbury Twp	07850	8/4/20	350,000	9/1/20		350,000
	S	S	77 Kim Ln	Washington Twp	07853	6/15/20	650,000	7/6/20	8/17/20	650,000
	A	S	349 Fairview Avenue	Washington Twp	07853	8/26/20	600,000			0
	S	T	10 Trailwood Dr	Mount Arlington	07856	5/8/20	432,000	7/28/20	8/28/20	426,000