Inter Office Activity Visibility

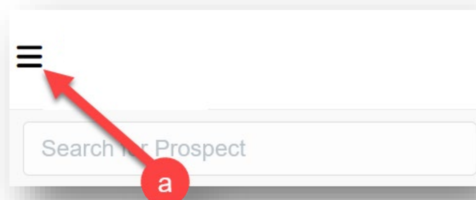
You can now share your prospect list with another user or have another user share their prospect list with you, so that you can collaborate and streamline your recruiting efforts. You can now view each other's notes and activities associated with the prospect.

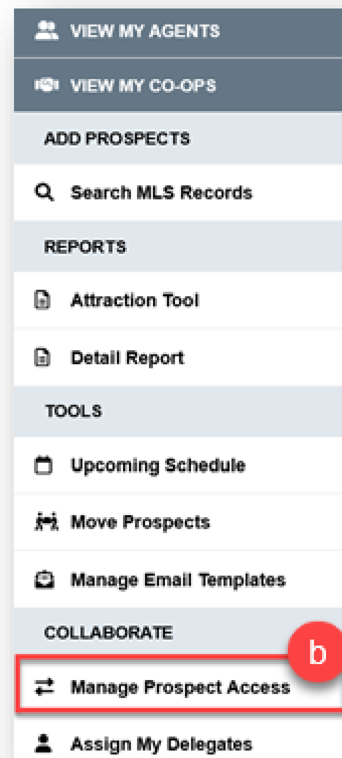
MANAGE PROSPECT ACCESS

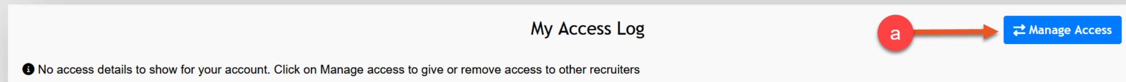
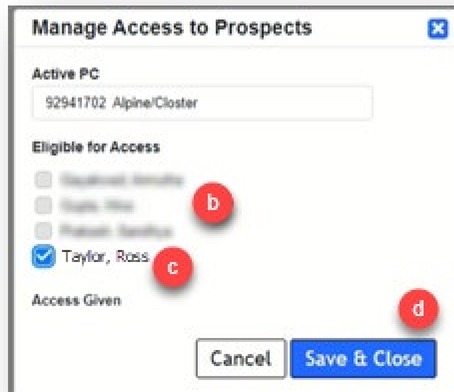
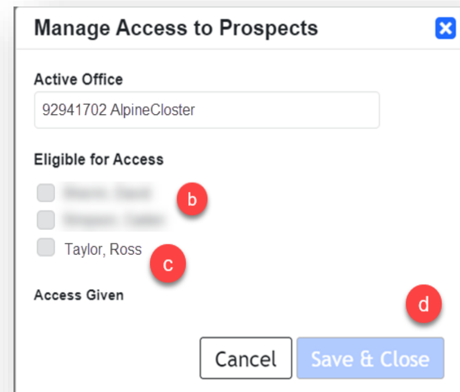
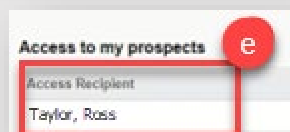
To manage prospect access:

a. Click **menu** to expand the left-hand side menu panel.

b. Click **Manage Prospect Access**





MANAGE PROSPECT ACCESS (CONT'D) You will be taken to the **My Access Log** screen. **Note:** The initial screen will have no data. a. Click **Manage Access.**	
A popup will appear, allowing you to grant or remove access to your prospect list by PC or office. b. If any are available, a list of users who are eligible for access will appear. c. Check the box to select who you wish to grant access to your prospect list. d. Click **Save & Close** to confirm your selection(s).	**Manage Prospect Access (RBG)**  **Manage Prospect Access (RFG)** 
e. Your access log will be updated, showing who now has access to your prospects. f. A notification will also be delivered to the user who has been granted access.	 

ACCESS REMOVAL

There may be instances when you wish to remove access to a user.

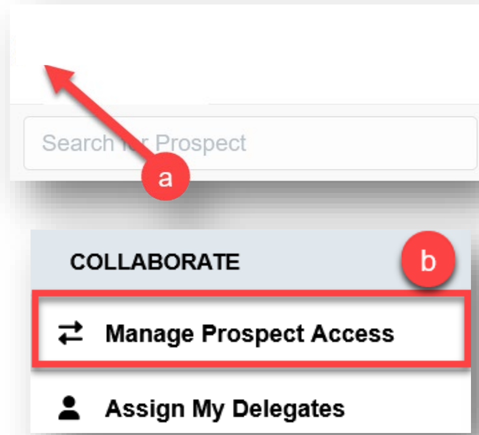
To remove access:

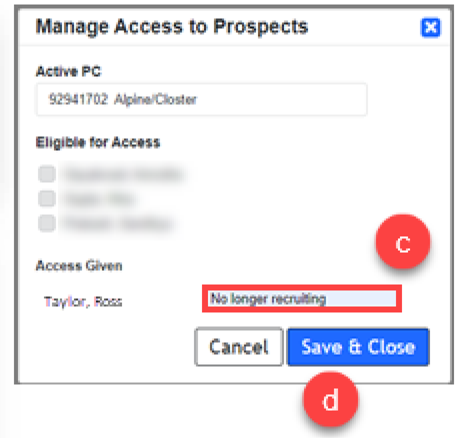
a. Click the **menu** button.

b. Click **Manage Prospect Access**.

c. Find the user and select a reason for removing their access.

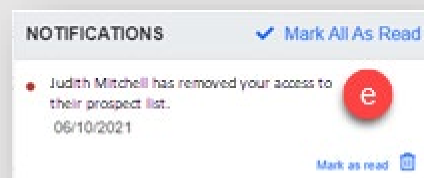
d. Click **Save & Close**.





e. The user who has been removed will receive notification that they have had their access removed.

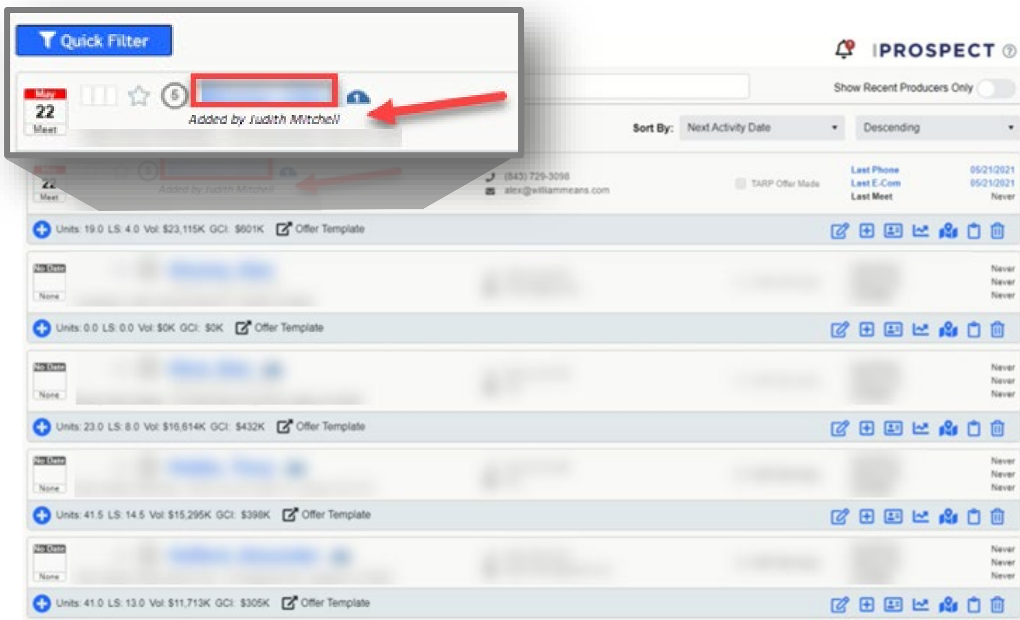
f. Your access log will be updated, showing that you removed a recipient and why you removed them.



VIEWING SHARED PROSPECTS

Your prospect list will look different once you are given shared access to another user's prospect list.

Once you are granted access to another user's prospects, you will see the name of the user who added the prospect under the prospect name.



VIEW MY PROSPECTS SCREEN

PROFILE UPDATE

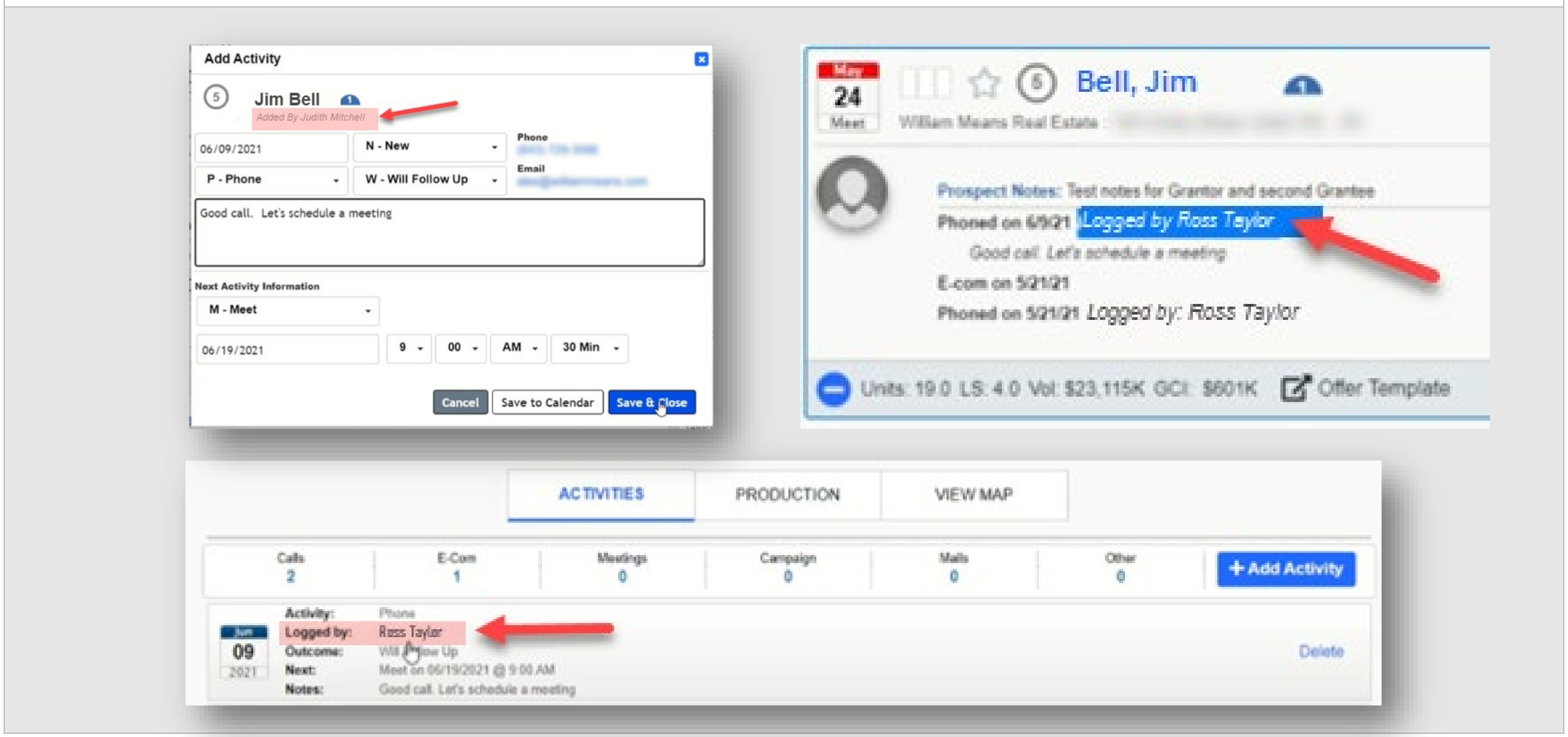
When a shared prospect's profile is updated by someone, other than the original owner, a **Last Updated By** label will appear on the bottom right of the prospect card.

ACTIVITY ENTRY

When you add an activity to a shared prospect, it will be recorded against the account of whoever originally added the prospect to their list. When you view the prospect activity history, you will see a field called **Logged By.** This tells you when an activity has been entered by someone who was not the original owner of that prospect.

If you own the prospect and add an activity, you will not see the **Logged By** label next to any activities that you have added.

In this example, you can see that the activity was added to one of Judith's prospects by Ross, as highlighted by the **Logged By** label.

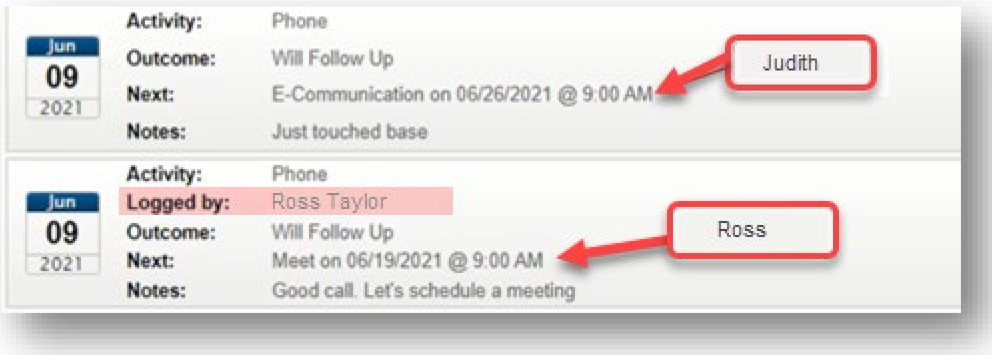


NEXT ACTIVITY DISPLAY

When you share a prospect with someone else, activity lists will include both user entries.

Next activities are specific to the user who created them.

In this example, you can see two recruiting activities for the prospect Jim Bell, who was originally Judith's prospect. One activity is created by Ross and the other created by Judith. You will see the **Logged By** field, showing where Ross has an activity with the prospect.



NEXT ACTIVITY DISPLAY

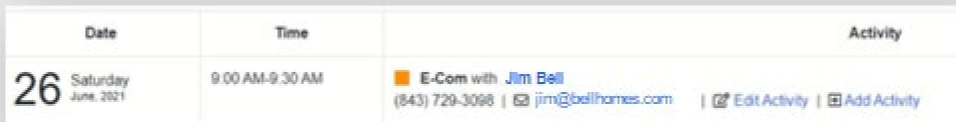
The **View All Prospects** screen and the **Upcoming schedule** screen displays a different result for each user against the same prospect.

The next activity shown is a task for the individual recruiter and not a shared item.

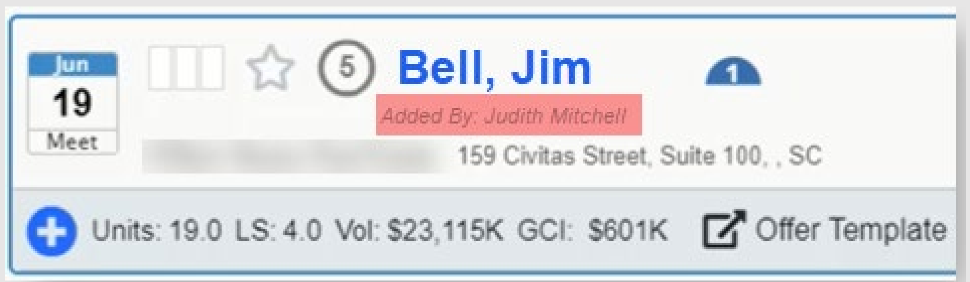
You will only see activities in the **Upcoming Schedule** screen that apply to you.

So, in the example, Judith will only see her upcoming activities, not Ross's. Notice that Ross's **View All Prospects screen** shows that the prospect Jim Bell was originally added by Judith Mitchell. His upcoming dates are different than Judith's.

Judith's View All Prospects Screen



Judith's Upcoming Schedule Screen



Ross's View All Prospects Screen

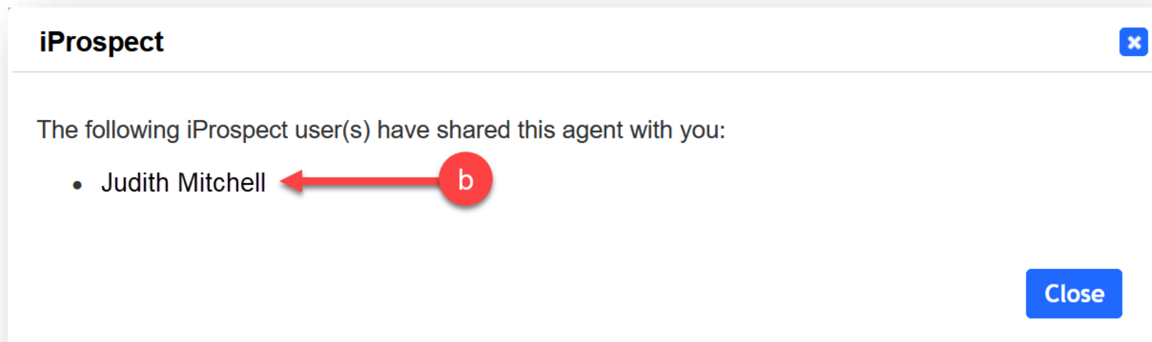
Ross's Upcoming Schedule Screen

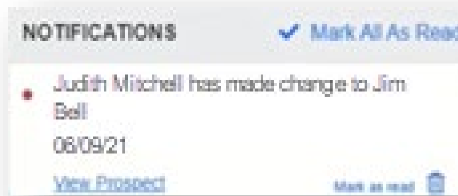
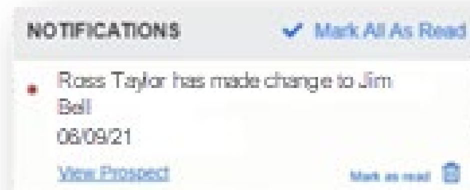
SEARCH MLS STATUS

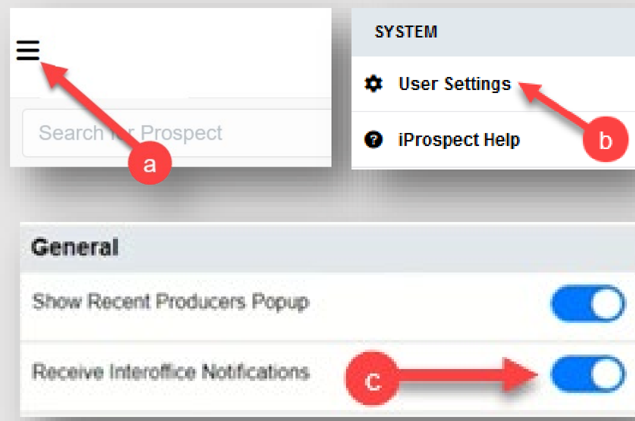
When Ross is in **Search MLS** and happens to be looking at **Jim Bell's** record, he will notice that a new status is available.

a. The "S" status indicates that someone is sharing this prospect with you.

b. Click the **"S"** to see the name of who has shared their prospect with you.



EMAIL DISTRIBUTION LIST When an email is being drafted from within iProspect, all users who have updated a shared prospect's profile or have created an activity for the shared prospect will be included in the CC list. For example, if **Ross** starts an email to a shared prospect, **Judith's** name will automatically appear in the CC field since **Judith** has been active in recruiting this prospect.	
ADDITIONAL NOTIFICATIONS Whenever a shared prospect's information is changed or an activity has been entered, the other users will be notified.	 

OPTING OUT OF NOTIFICATIONS You can opt out of receiving inter office notifications. a. Click the **menu button** b. Select **User Settings** c. Toggle the **Receive Interoffice Notifications** button.	

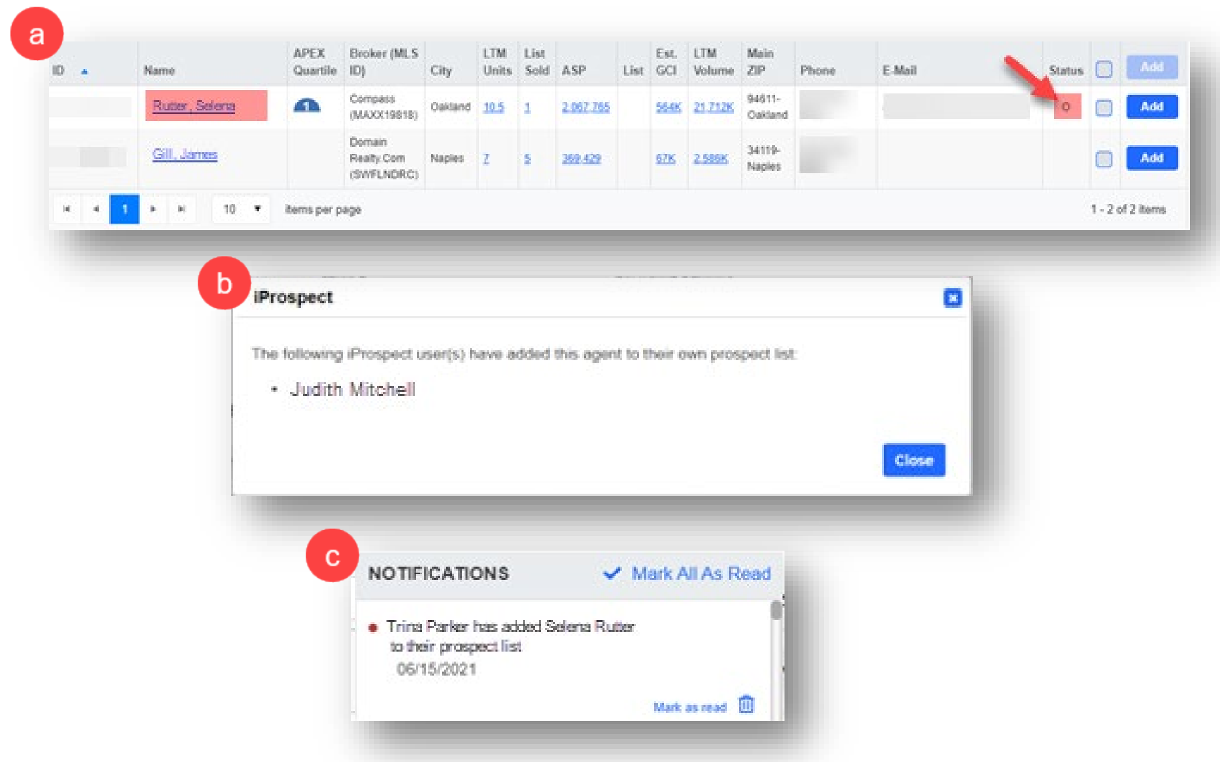
POTENTIAL PROSPECT SHARING OPPORTUNITY

a. In the **Search MLS** screen, you will see an **"O"** indicating that another user in your office already has this prospect on their list. If you still decide to add the same prospect to your own list, the person who already "claimed" this prospect will be notified.

b. In this example, Trina Parker decided to add the prospect to their list even though Judith already has this prospect on her list.

c. Judith receives a notification which could potentially be a prompt to begin sharing her list with Trina.

NOTE: Users must be within the same company/office in order to see that Trina has added Judith's prospect to her list.



Notices

COVID-19 – The COVID-19 crisis has resulted in executive orders and other protective guidance at the state and local levels. Please make sure you are reviewing the requirements in your area with your broker, including those related to non-essential businesses and telemarketing to consumers.

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Scripts - Any sample dialogue or script contains suggestions and is not intended to be used verbatim. The sample dialogue is designed to offer you suggestions for what you might say in some of the most common situations you may encounter as a real estate agent. These words are only a guide, however. The most effective dialogue will be the one that is authentically your own. You are encouraged to review these sample dialogues if you believe they may be helpful and to think about how you would present these resources when the opportunity arises in your real estate business. You should always revise any sample scripts to ensure they are factually accurate.

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• Any sales calls or communications to consumers must follow the requirements of the Telephone Consumer Protections Act ("TCPA"), state, and local telemarketing laws, including but not limited to requirements that messages or calls may not be sent using an automatic telephone dialing system or an artificial or prerecorded voice, unless you have express written consent from the consumer.
• We recommend that you review your local MLS rules and regulations regarding the proper use of listing data for other commercial purposes such as soliciting new clients or contacting expired listings.

Website Considerations - If you have a website, you may consider Privacy Policies about how you intend to use any data you might collect over the Internet, and incorporating terms of use.

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