<u>RE∕JLM</u>[™]

Tips & Tricks

How to Add a Client to a Team on your mobile device

You can add one or more clients to a Team so that you and your colleagues - other real estate sales representatives from your brokerage - receive the same listings and communications notifications for the client(s). To add a client to a Team on a mobile:

- 1. Select **Contacts** from the menu bar.
- 2. Select the **layer menu** and place a bullet beside the status of the contact. Select from active, inactive, or disabled.
- 3. Select the client that you would like to add to a team.
- 4. Select the **menu icon**
- 5. Select the **arrow** beside **Share with Team.**
- 6. Place a check in the box 🗹 beside an existing team, OR
- 7. To create a new team, select **+New Team**.
 - a. A create team window will appear, enter a team name, and select **Save**.

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JB	Jason Buyer		Not Active Share with Team	~ 5		Cancel	Save
JB	Jack Buyer		Buyer 6	3	Email: theresa.		
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	5 clients found		Member since January 18th, 202	23	Add to Team		
			Cancel		Hill Team Buyers New Team	7	
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If you have any questions, please contact us at <u>Help@REALMmlp.ca</u>.

