

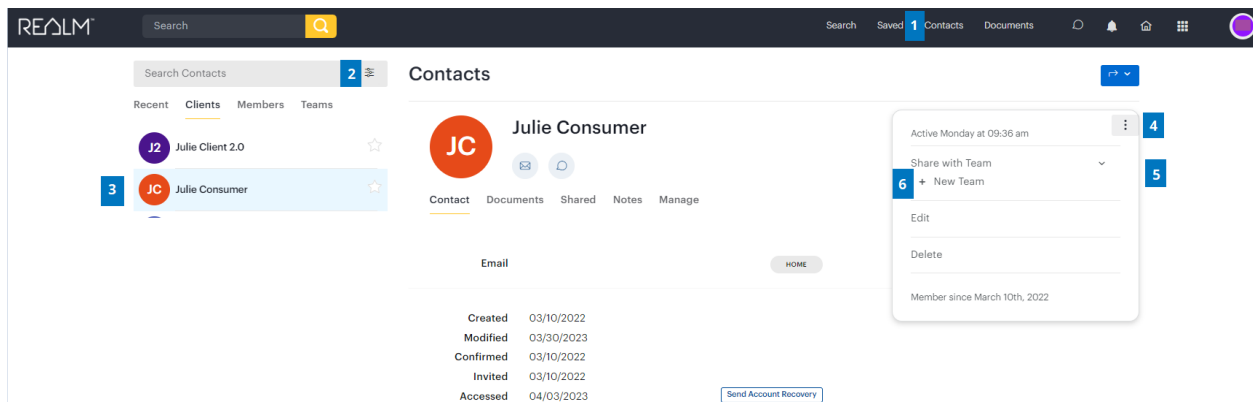


Tips & Tricks

How to Add a Client to a Team on your PC

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 computer:

1. Select **Contacts** from the menu bar.
2. Select the **layer icon**  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. Select **+New Team** to create a new team.
 - a. A create team window will appear, enter a team name, and select **Save**.

If you have any questions, please contact us at Help@REALMmlp.ca.