Are you ready for REALM™? Essential steps for a smooth transition



Presented by: Theresa Corindia

Are you ready for REALM[™]? Essential steps for a smooth transition!

Experience enhanced efficiency and productivity with REALM[™] as we bid farewell to Stratus & seamlessly transition your data and adapt to the functionalities of REALM[™].

In this session you will learn how to:

- Search and set default preferences.
- Save a search and set up notifications.
- Import your contacts from Stratus into REALM[™].
- Import favourite listings and listing carts into REALM[™].
- Import Stratus prospect and saved searches into REALM[™].
- Access the various ways to get help in REALM[™].



REALM Customer Service: email at <u>help@realmmlp.ca</u> or call **1-888-417-4817.**





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REALM™ Basics



REALM™ Dashboard





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REALM[™] Contacts







REALM[™] Contacts

	Add New Client	
	Benjamin Middle Name Buyer Company Use Template Phone Phone Phone Mobile v + Email theresa.corindia@teranet.ca Home v + Related Contact +	
	Source +	
Tip: Invited contacts will receive emails fr	rom you with instructions on how to set up login crec	lential and get started.
	Cancel Save Save & Invite	



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REALM[™] SEARCH







REALM[™] Default Settings

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REALM[™] Default Settings

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Tip: When choosing a location, you can search by **Community** without first identifying the **Area** or **Municipality**.





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Tip: If you click the box for 3 then you will only see properties with 3 bedrooms.





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REALM[™] Save a Search

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Unionville - Detached, 34	Bedrooms	App Notifications Email Real Time	
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 Bugs Bunny Julie Newhouses 	Hello KittyName of the agent	* Enter up to 20 valid email addresses. Email Listing Format Small Photo w/ 3 lines	~
Julie and Theresa		Settings	
aily emails are sent out	at approximately 8:00 PM.	NEW Real time notifications a	are sent when the lis



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Notification

REALM

Be informed about important activities in real time!

Email to your desktop and/or mobile



York Properties found one listing on Monday, December 5:



Richmond Hill 3+1 Beds 2 Baths Detached 1 1/2 Storey \$1.3M 0 DOM

View all of your searches Unsubscribe | Change email settings





Save For		App Notifications Email Real Time Notifications for My Client
Search Recent Clients Teams		 App Notifications ✓ Email Daily ✓
🕲 Benjamin Buyer	8 Myself	Frequency Daily ~
18 Yogi Bear	Charlie Brown	Email Address(es) jack@email.com × jill@email.com ×
Bugs Bunny	Hello Kitty	
Julie Newhouses	Name of the agent	
Julie and Theresa		* Enter up to 20 valid email addresses. Email Listing Format
		Small Photo w/ 3 lines





RE∕LM[™]

Download Contacts

Step 1



Download contacts from Stratus







Download contacts from Stratus







Download contacts from Stratus







<u>RE</u>∩LM[™]

Import Contacts Step 2



Import Contacts into REALM™







Import Contacts into REALM[™]

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	Drop a CSV file or Browse files	
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Import Contacts into REALM™







Import Contacts into REALM[™]

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Import Contacts into REALM[™]

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	Full Name Organization Email Address Phone Number	
	Ben Buyer theresa.corindia@teranet.ca	_
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	Contact Three Contact.Three@email.com	
	Contact Iwo Contact.Iwo@email.com	
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The same	name and email exist in your database you will n	lot be able to select it.
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Import Contacts into REALM™







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Import Favourite Listings



Import Favourite Listings into REALM™







Import Favourite Listings into REALM™

 To replace the liked listings in REALM with Stratus V3 favourite listings, click Replace REALM Likes.

 To add Stratus V3 favourite listings to the REALM liked listings, click the Add to REALM Likes.

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Settings					
CORINDIA REALMT	Stratus Lists Favourite Listings				
My Profile	Your Favourite Listings from your accound Stratus Favourite Listings to your REALIng Favourite Listings.	int within Stratus car A Likes list or replace	n be imported to REALM. 9 your REALM Likes list wi	You can add your th your Stratus	
Personalization			Replace RFALM Likes	Add to REALM Likes	
Account					
Market Areas	Listing Carts The listing carts here are from your acc	ount within Stratus.			
Notifications	Click the Import button to save a listing	cart to REALM.	and the literian and a		
Land Registry	click Import Selected.	activate the checkbe	oxes on the listing carts y	ou wish to import and	
Stratus Lists	Please note: The Import Selected featu	re will save all selecte	ed listing carts to your lis	ts and not to clients.	H
Stratus Searches	If you have previously imported a listing	g cart, importing it ag	gain will overwrite your lis	st here.	Show r
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	For CMA for (Address)	4/25/2024 4:10 PM	5/9/2024 9:18 AM	Import	
	Showings on (Date)	4/25/2024 4:08 PM		Import	





Your Favourite Listing will be in your Likes List in Contacts







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Import Listing Carts

















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Settings	nport List			
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My Profile	ave For Search		/ou can add your h your Stratus	
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	Showings on (Date)	4/25/2024 4:08 PM	Import	





Listing Carts will be in your Lists in Contacts







You can save an individual listing cart to your contacts lists!













Listing Carts will be added to your Contacts Lists







You can save multiple listing cart to your lists!













Listing Carts will be in your Lists in Contacts







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Stratus Searches









To import individual prospect or saved searches, click **Import.**

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REJLM	Search		Search Con	tacts Documents	D 🌲 🏛	₩ ?	
	Settings						
		Stratus Searches					
	N REALMT	The saved searches and prospect searches her	re are from your accoun	t within Stratus.			
	My Profile	Click the Import button to save a search to RE/ To import multiple searches at once, activate th	ALM. he checkboxes on the s	earches you wish to import and o	click Import Selected.		
	Personalization	Please note: The Import Selected feature will s	ave all selected searche	es to your searches and not to cli	ents.		
	Account	If you have previously imported a search, impo	rting it again will overw	rite your search here.			
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	Stratus Lists	1 KM from Danforth Go - Detached	Prospect Search	4/29/2024 2:28 PM	Import		**
	Stratus Searches	88 Blue Jays Way	Prospect Search	4/23/2024 9:46 AM	Import		show r
		Port Credit- 2+ bedroom Condo Apts	Saved Search Ben Buyer	4/22/2024 10:47 AM	Import		ne ho
		East York Bungelows	Saved Search Ben Buyer	4/22/2024 10:42 AM	Import		~
		C01, Niagara Condos	Saved Search	4/18/2024 4:53 PM	Import		
		Ajax - Townhouses	Saved Search	4/18/2024 4:56 PM	Import		
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Searches saved for you will be added to your Searches







To import individual prospect or saved searches, click **Import.**

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/ou can save an	🕲 Bugs Bunny	Hello Kitty		
ndividual search	Julie Newhouses	Name of the agent	* Enter up to 20 valid email addresses.	
or a contact!	Julie and Theresa		Email Listing Format Small Photo w/ 3 lines	~
			Settings Hide from client 7 Save as Benjamin Buyer's Default Search	Show n
				Save Search
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Searches saved for your contact will be added to their Searches







To import individual prospect or saved searches, click **Import.**

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	Personalization		Please note: The Import Selected feature will say	ve all selected	searches to you	r searches and not to o	clients.				
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			Benjamin Buyer	Ben Buyer		4/22/2024 10:47 AM	5/10/2024 7:44 P	M Im	port	-	1e how
			East York Bungelows	Saved Search Ben Buyer		4/22/2024 10:42 AM		Im	port		
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To import individual prospect or saved searches, click **Import.**

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Market Areas	Import Selected				
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Land Registry	Properties in NewMarket with an inground pool	Prospect Search	5/10/2024 7:42 PM 5/10/2024 7:-	45 PM Import	
Stratus Lists	1 KM from Danforth Go - Detached	Prospect Search	4/29/2024 2:28 PM 5/10/2024 7:-	45 PM Import	8
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	C01, Niagara Condos	Saved Search	4/18/2024 4:53 PM	Import	
	Ajax - Townhouses	Saved Search	4/18/2024 4:56 PM	Import	





All searches will be added to your Searches







You can adjust notifications for a search







You can adjust notifications for a search

Search Name Georgetown Properties		Notifications for Me					
Save For Search		Email Daily Additional Email Notifications Frequency Daily					
Recent Clients Teams		Email Address(es)					
& Myself	Benjamin Buyer	geowarehouse.support@teranet.ca ×					
🕒 Charlie Brown	🕫 Yogi Bear						
Bugs Bunny	😬 Hello Kitty	* Enter up to 20 valid email addresses.					
Julie Newhouses	Name of the agent	Email Listing Format					
n Julie and Theresa		Settings Save as My Default Search					
		Cancel Save Search					
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Need Help Getting Started or Support?

We've got you covered!

Desktop:

 Select the ? icon from navigation bar on the right-hand side and visit The REALM Help Centre where you will find a NEW AI powered REALM assistant - to help you find video tutorials, help articles, and FAQs.

REALM

• Select **Show me how** from the right side of the window to access guided tours.

Mobile:

• Select Help in your profile avatar and visit The REALM Help Centre.

For quick tips, follow us on Instagram @realm.mlp or Facebook at REALMmlp.

Contact Customer Service via email at help@realmmlp.ca or call 1-888-417-4817.



Questions & Answers

Let's take a few minute to answer any questions about getting started!



