



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 help@realmmlp.ca or call **1-888-417-4817**.

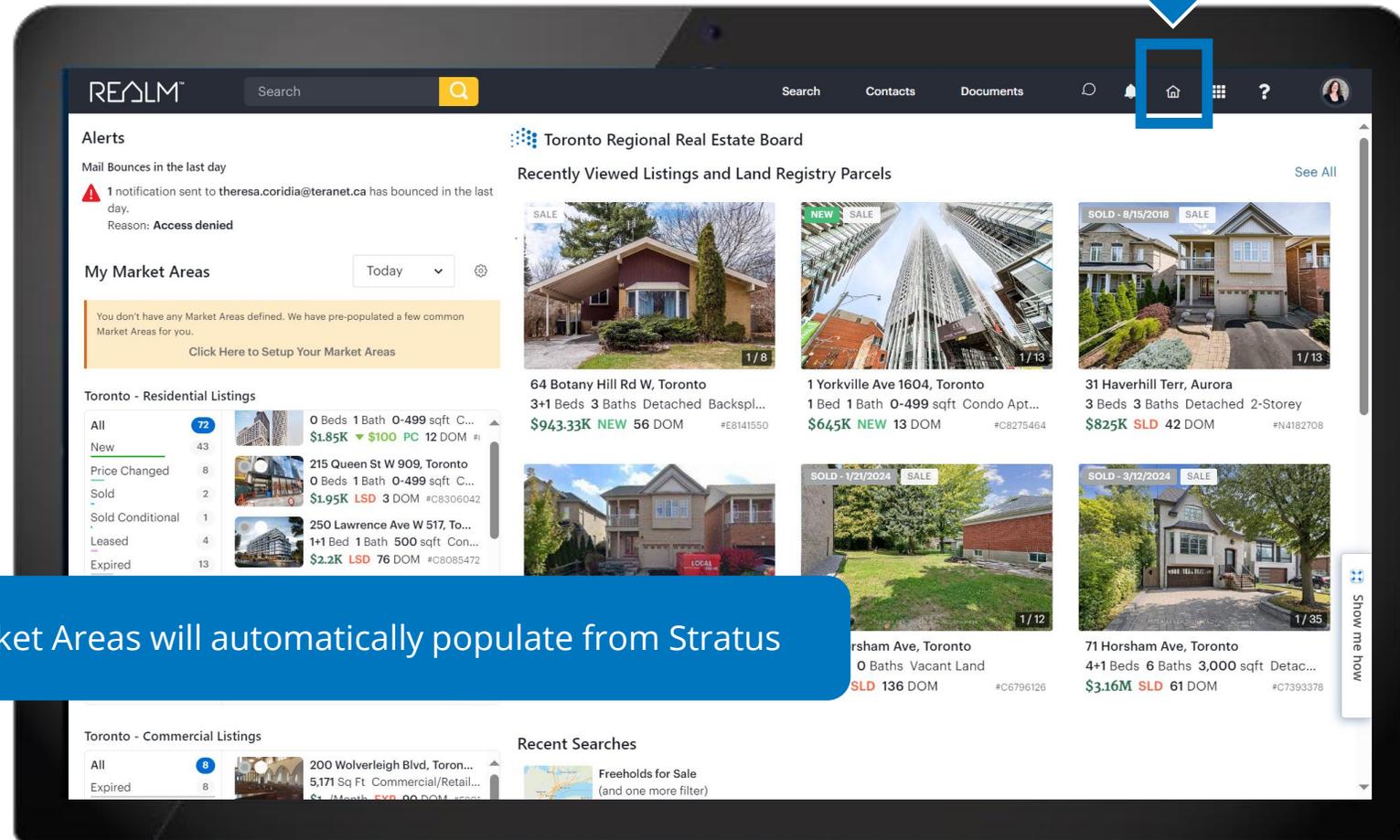


REALM™

REALM™ Basics

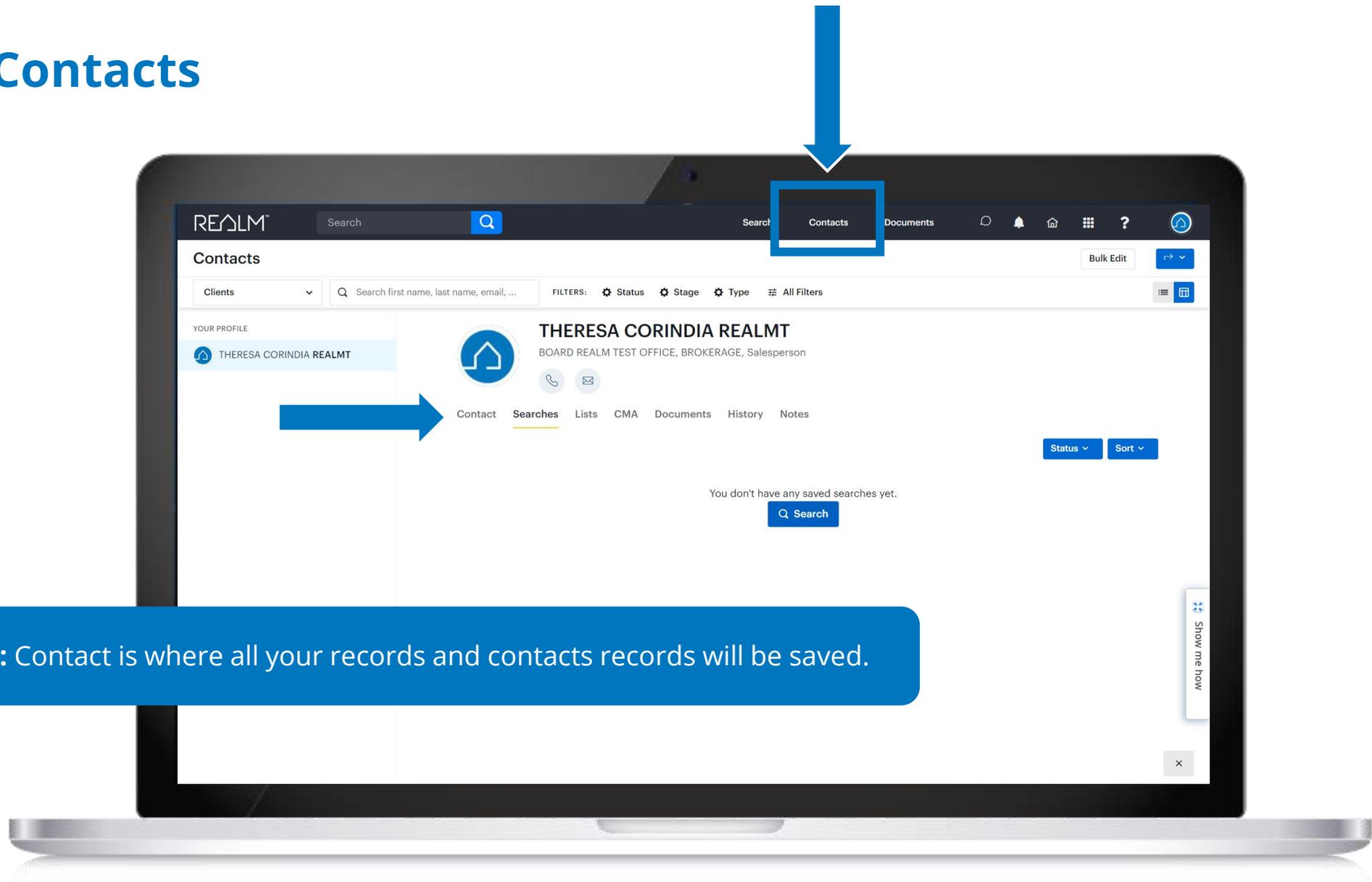


REALM™ Dashboard



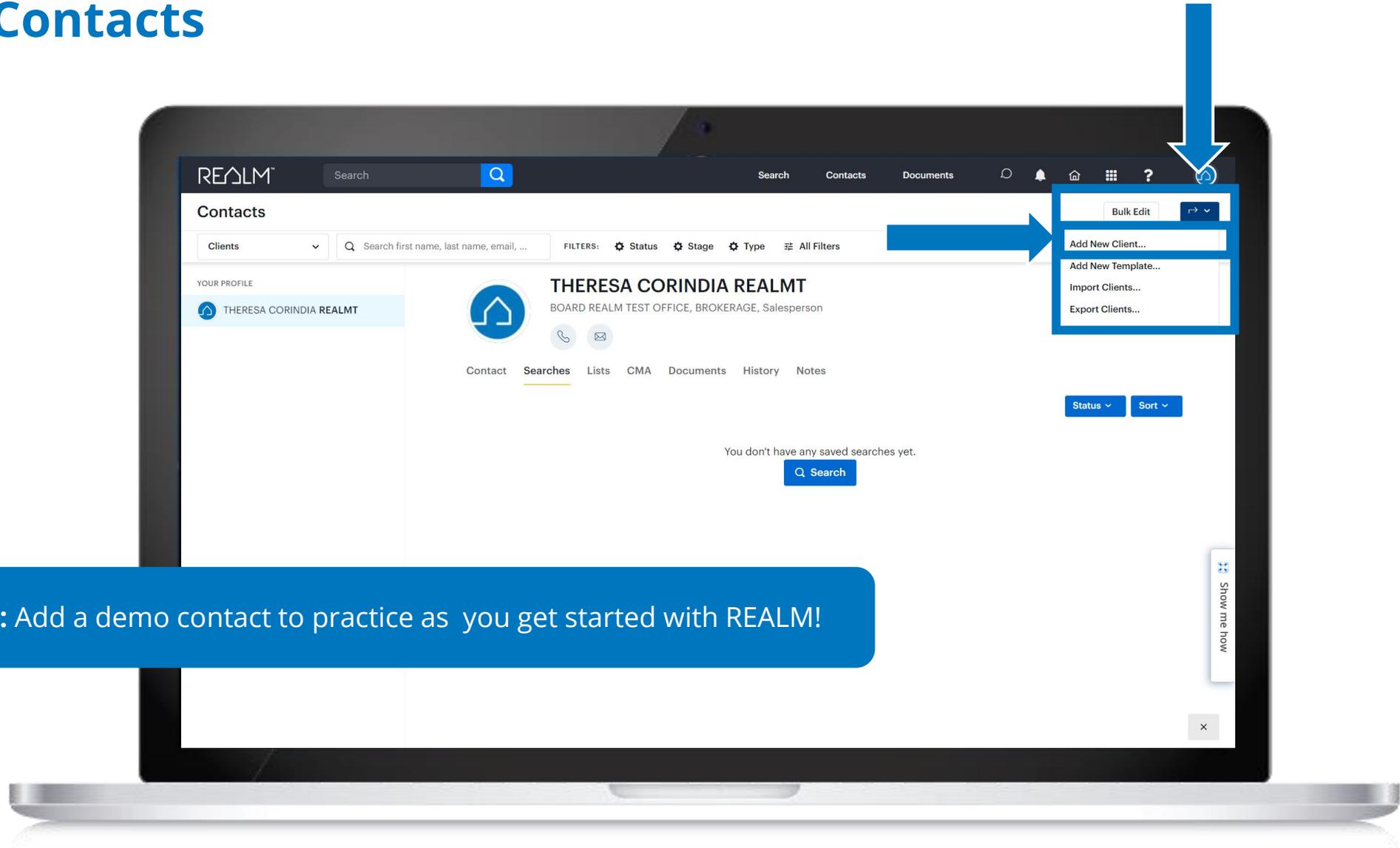
 **Tip:** My Market Areas will automatically populate from Stratus

REALM™ Contacts



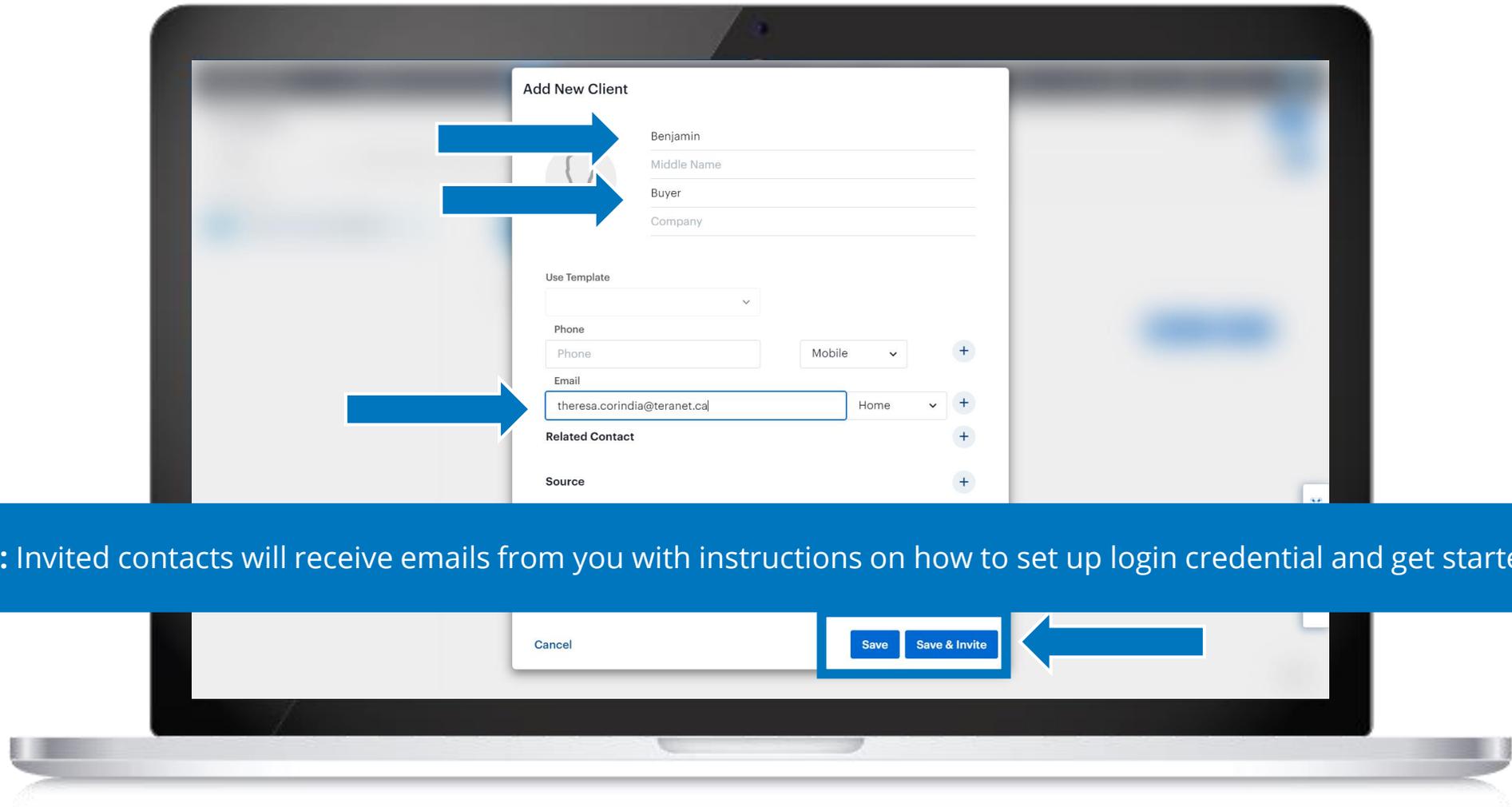
Tip: Contact is where all your records and contacts records will be saved.

REALM™ Contacts



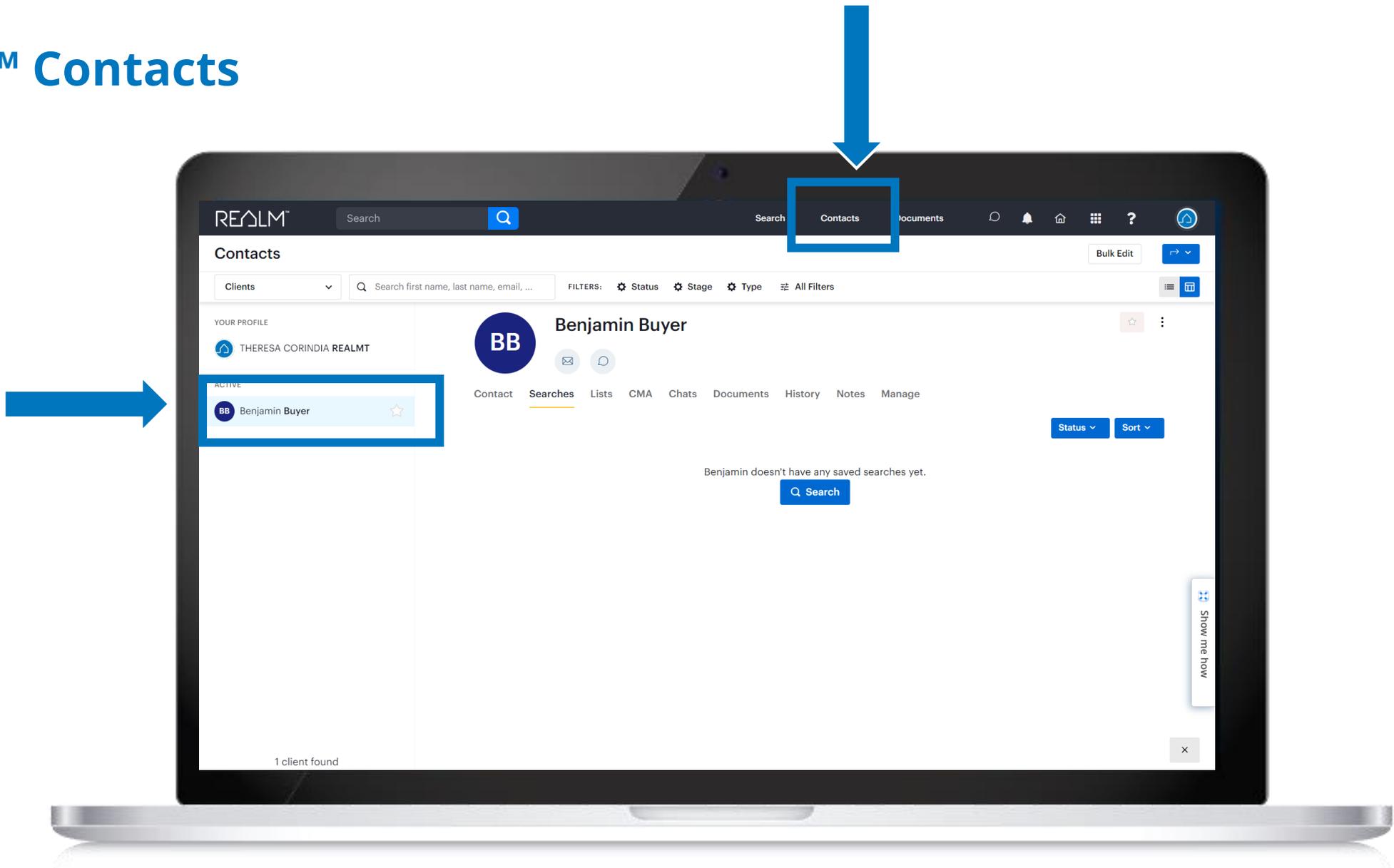
Tip: Add a demo contact to practice as you get started with REALM!

REALM™ Contacts

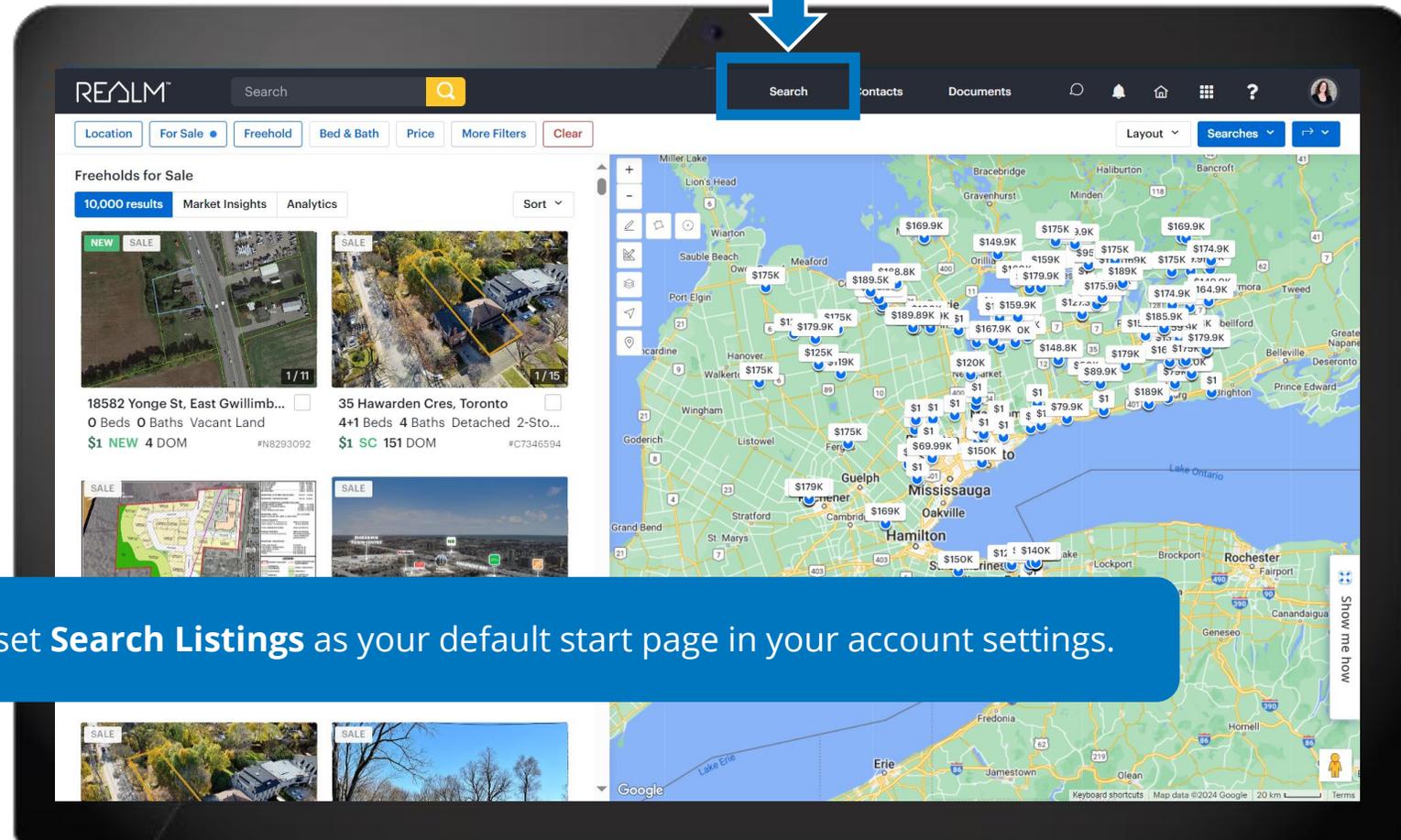


Tip: Invited contacts will receive emails from you with instructions on how to set up login credential and get started.

REALM™ Contacts



REALM™ Search

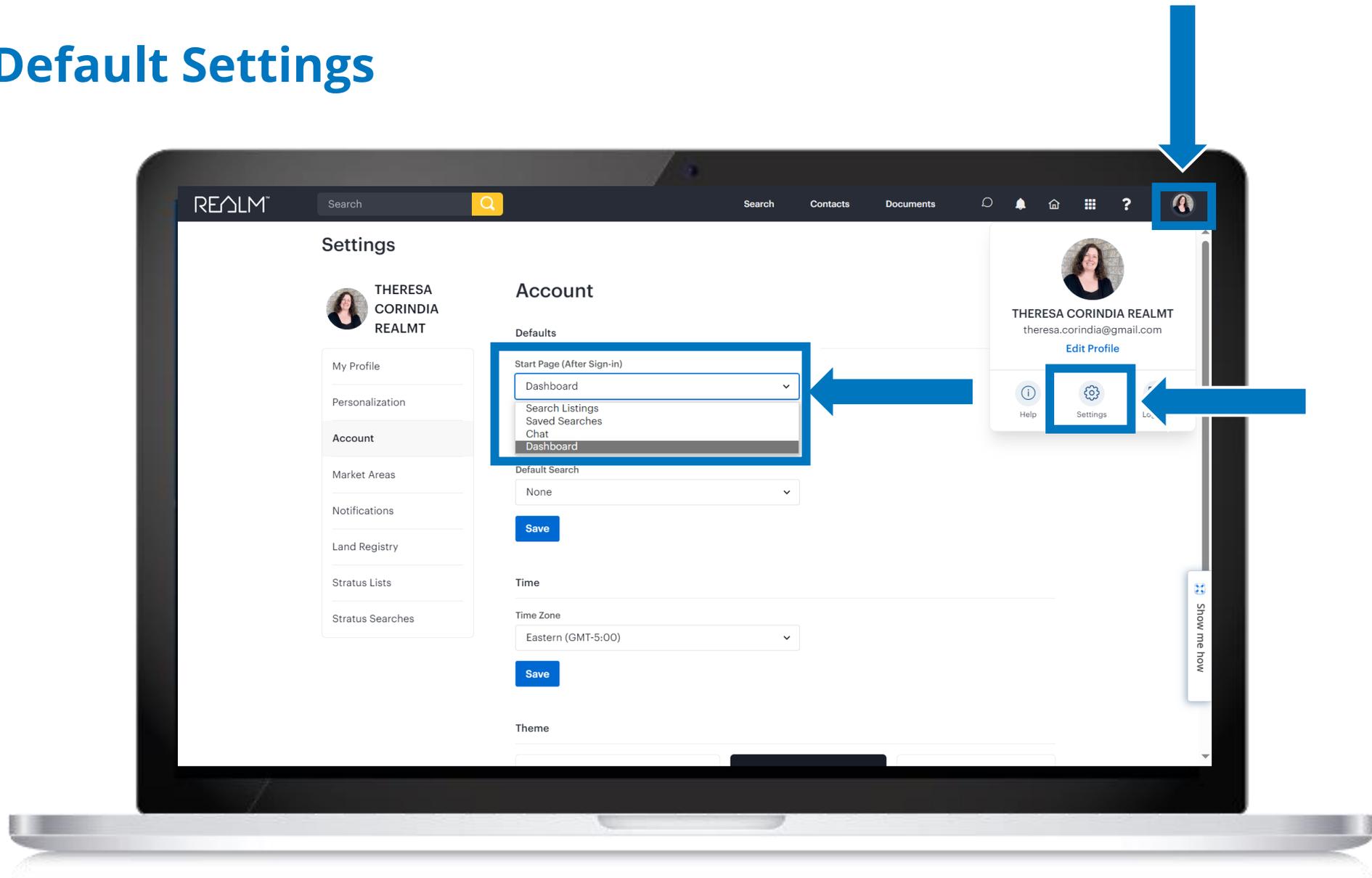


REALM™ SEARCH

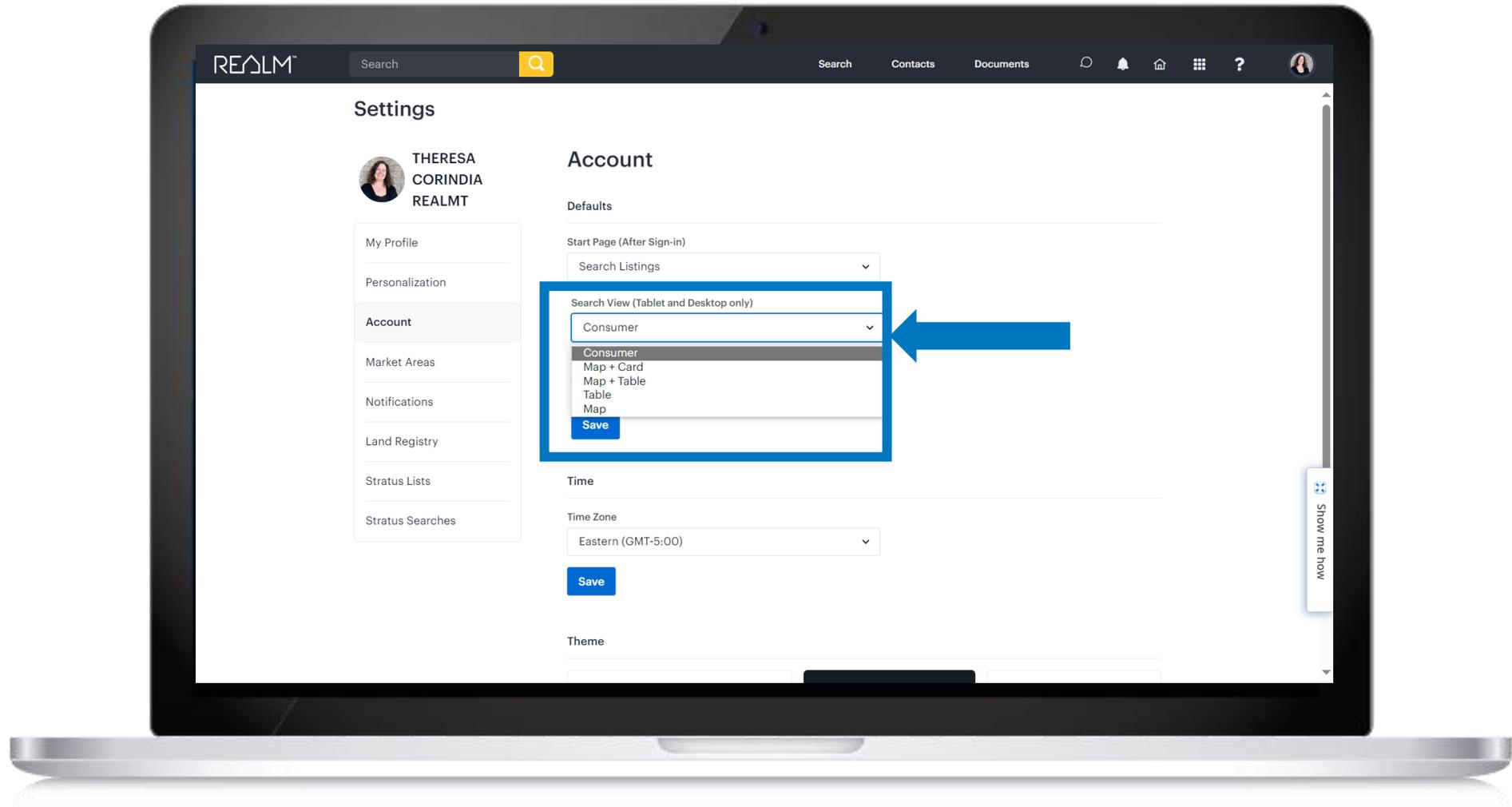
Tip: You can set **Table Layout** as your default start page in your account settings.

#	Address	Beds	WR	Type	Price	Area	PC
1	46 Foxglove Crt Markham	3 + 1	4	Semi-Detached 2-Store			
2	28 Mcclary's Way Markham	3 + 1	4	Att/Row/Twnhouse 3-Sto			EW
3	22 Teasel Way Markham	4 + 1	5	Att/Row/Twnhouse 3-Storey	\$1,498,000	2000-2500	PC
4	7 Mackenzie's Stand Ave Markham	4	3	Att/Row/Twnhouse 3-Storey	\$1,550,000	3000-3500	NEW
5	23 Waterbridge Lane Markham	3 + 1	4	Detached 2-Storey	\$1,588,000		NEW
6	84 Main St Markham	3 + 1	3	Detached 1 1/2 Storey	\$1,688,800		NEW
7	82 Upper Duke Cres Markham	3 + 1	3	Att/Row/Twnhouse 3-Storey	\$1,709,000		PC
8	21 Frank Charlton Ave Markham	4	6	Att/Row/Twnhouse 3-Storey	\$1,780,000		PC
					\$1,850,000	2000-2500	NEW
					\$1,888,888	3500-5000	NEW
11	28 Barlow Rd Markham	4 + 1	4	Detached 2-Storey	\$1,899,000	3000-3500	NEW

REALM™ Default Settings



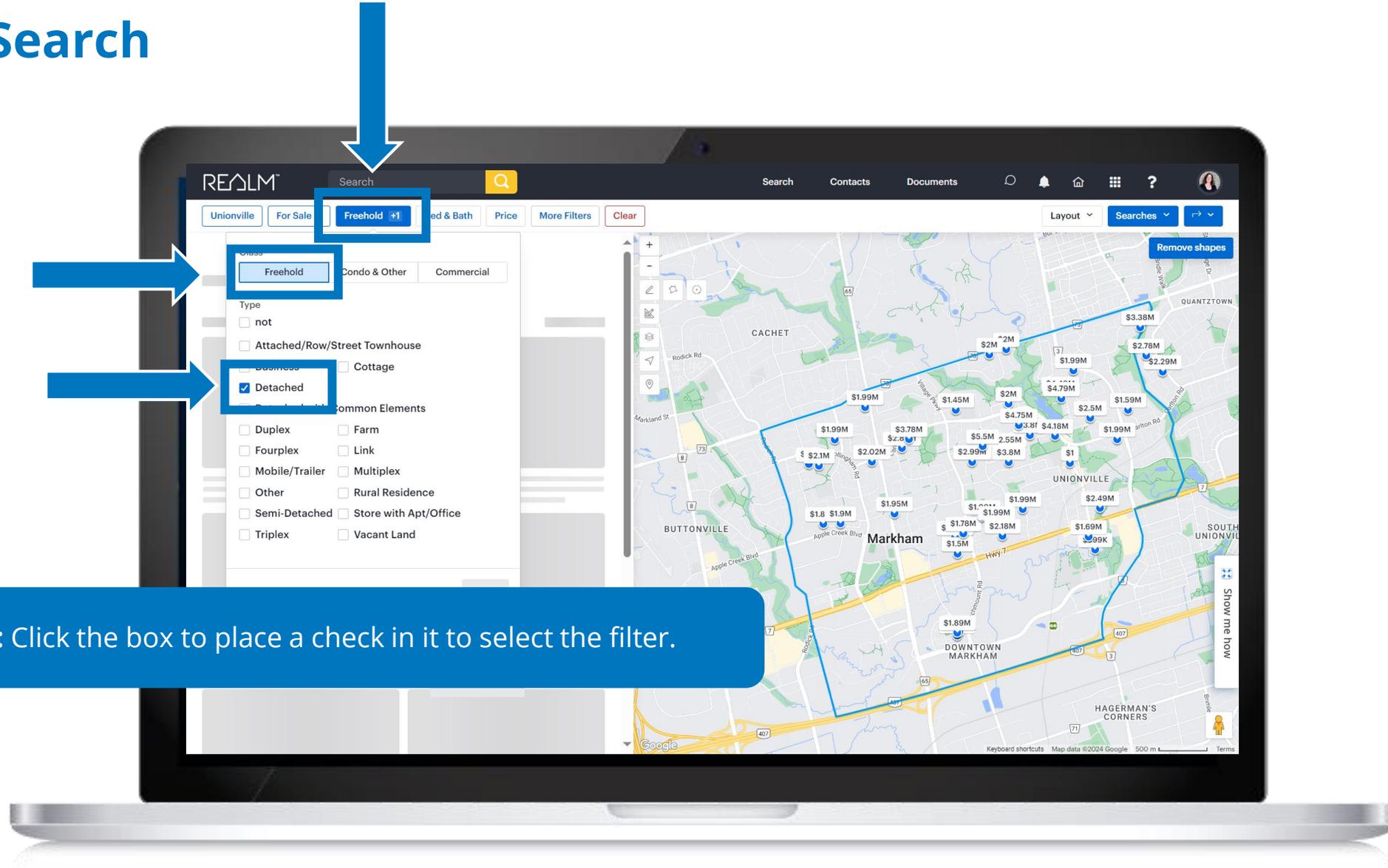
REALM™ Default Settings



REALM™ Search

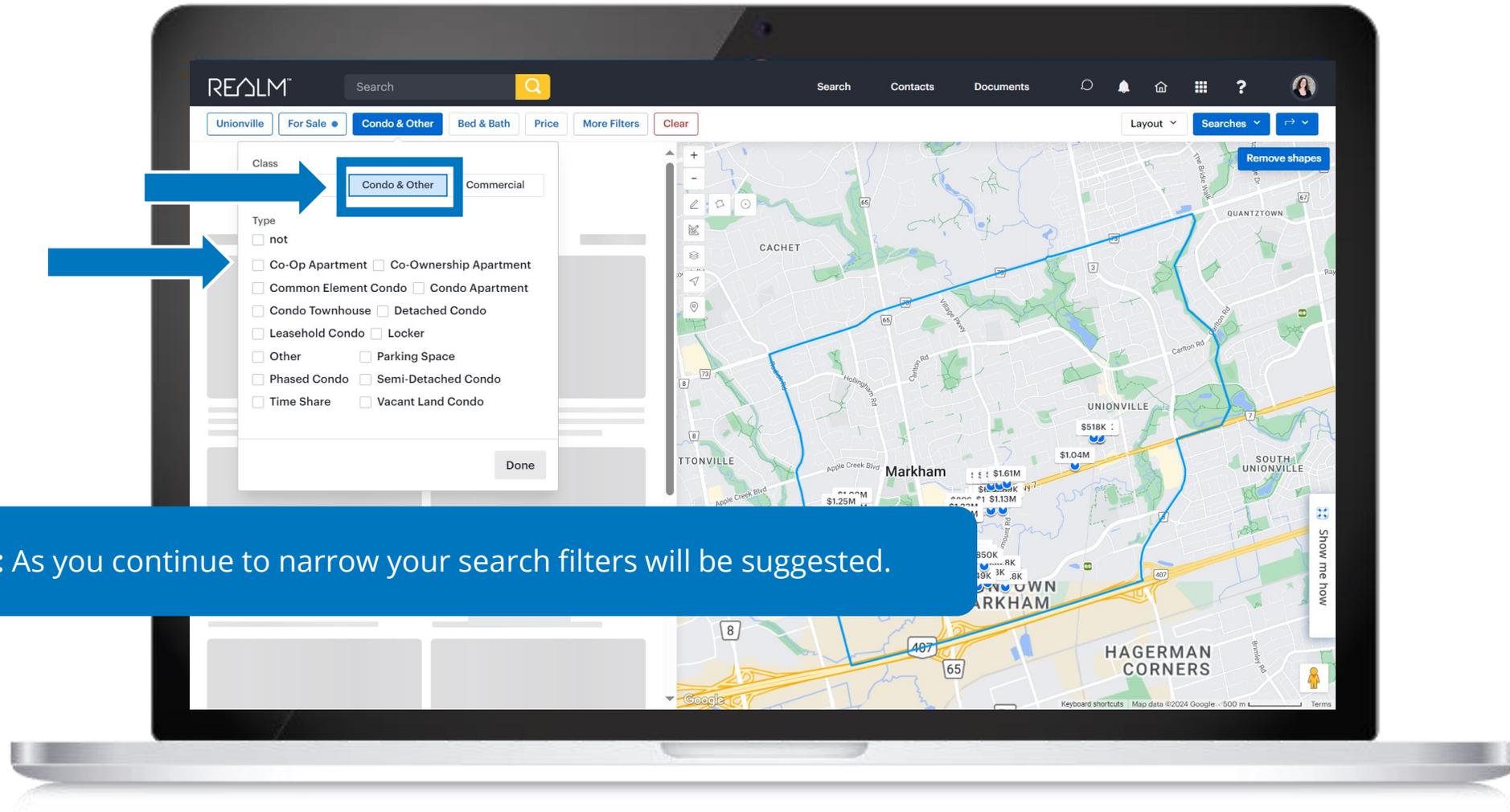
Tip: When choosing a location, you can search by **Community** without first identifying the **Area** or **Municipality**.

REALM™ Search



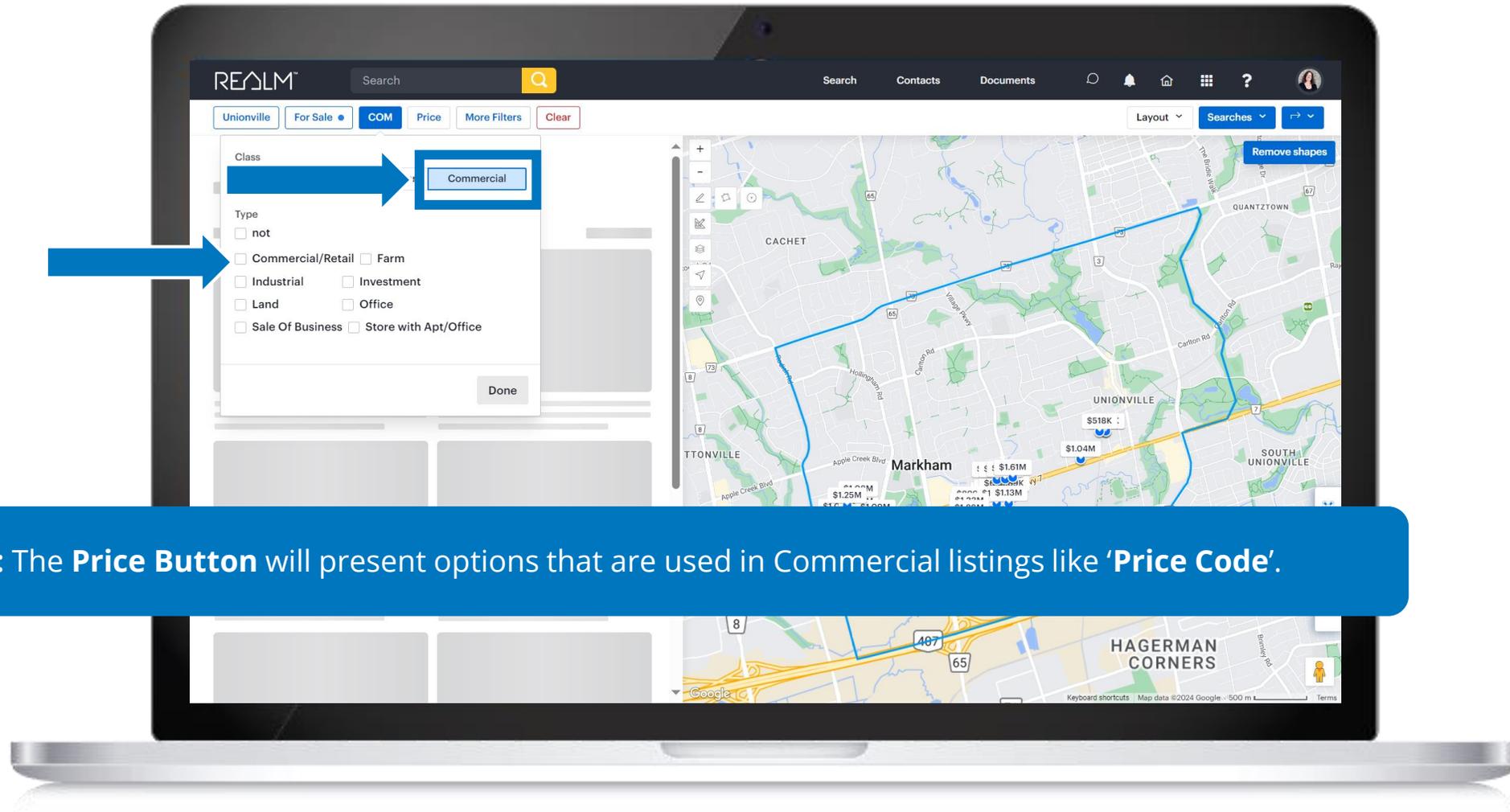
Tip: Click the box to place a check in it to select the filter.

REALM™ Search



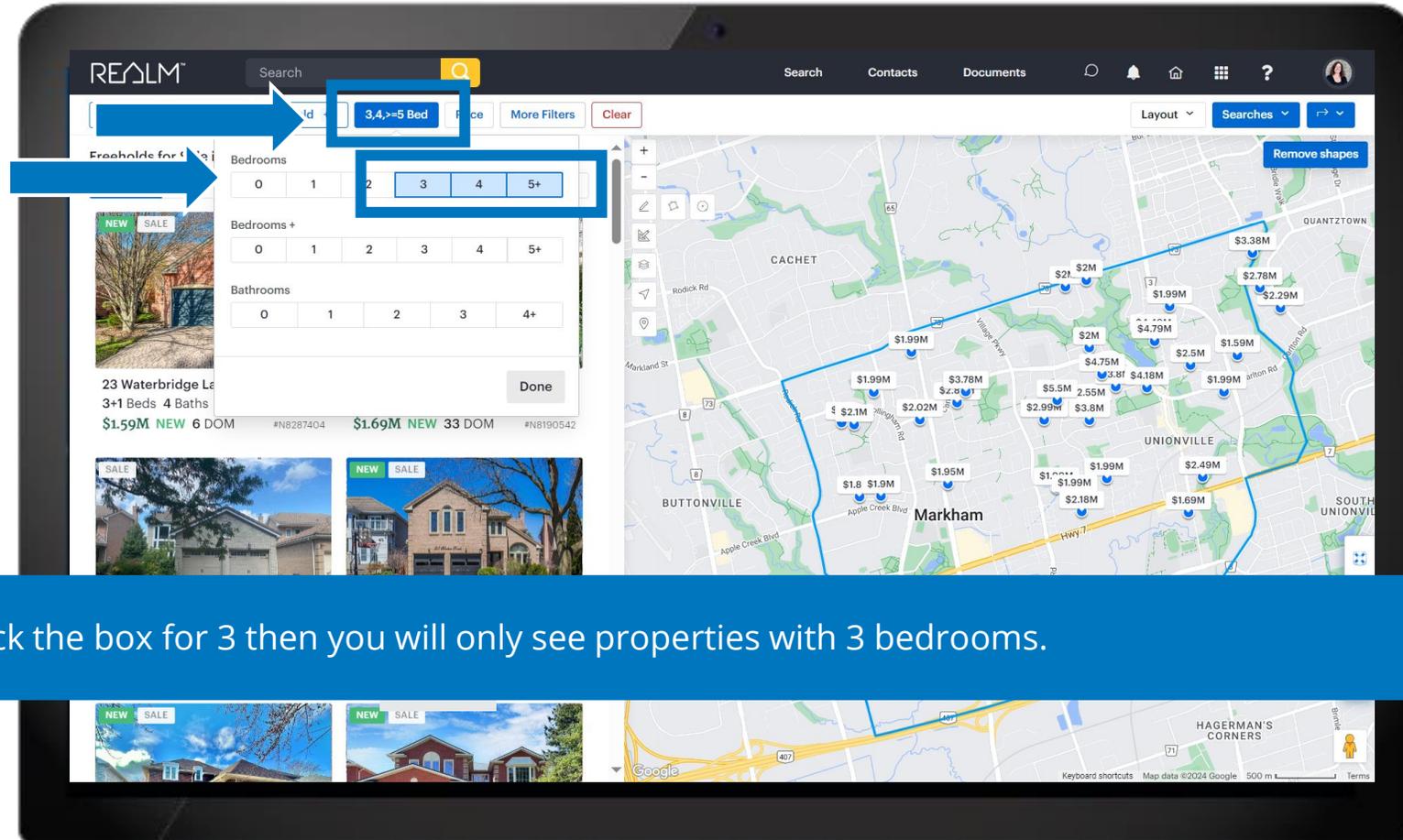
Tip: As you continue to narrow your search filters will be suggested.

REALM™ Search



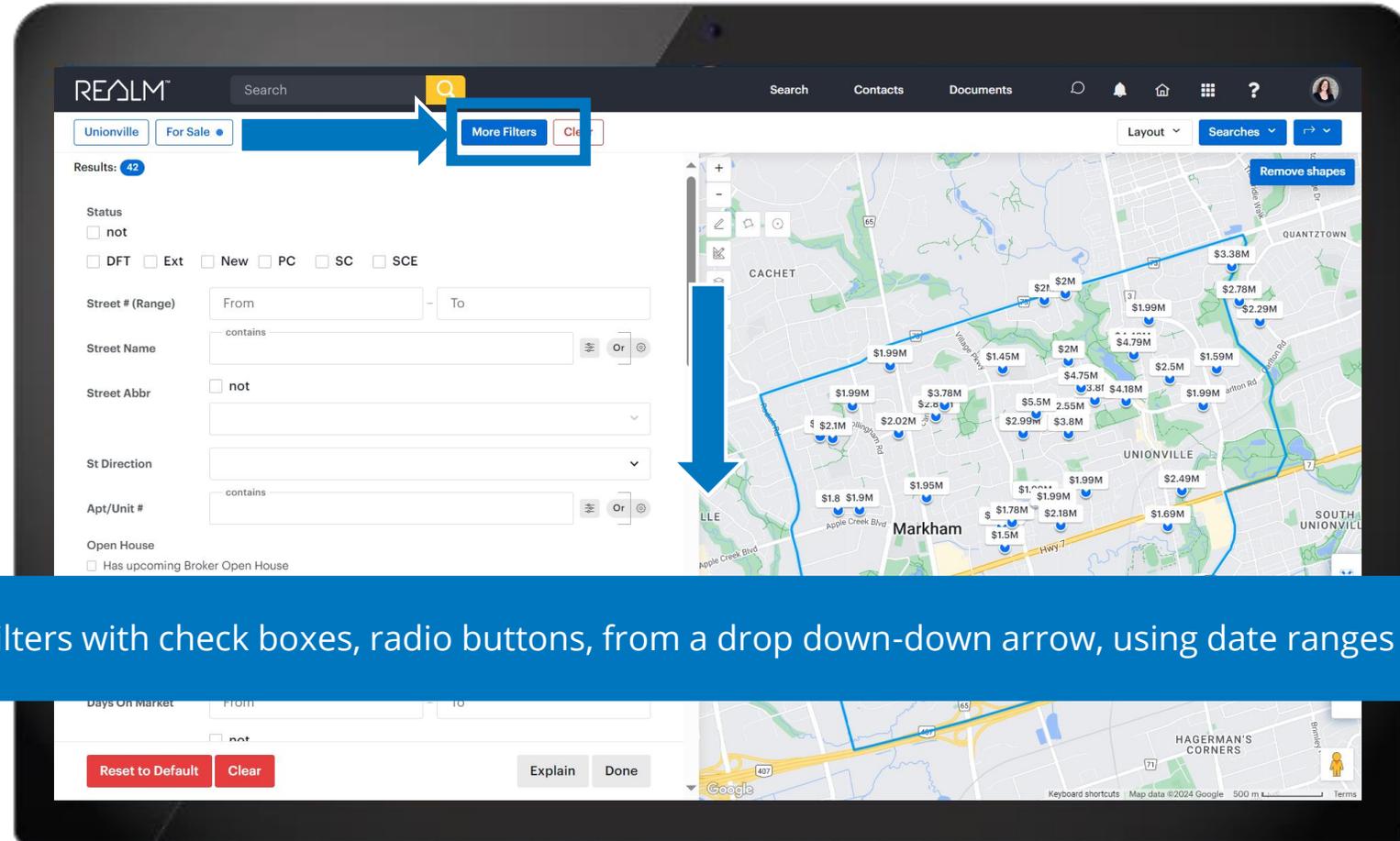
Tip: The **Price Button** will present options that are used in Commercial listings like 'Price Code'.

REALM™ Search



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

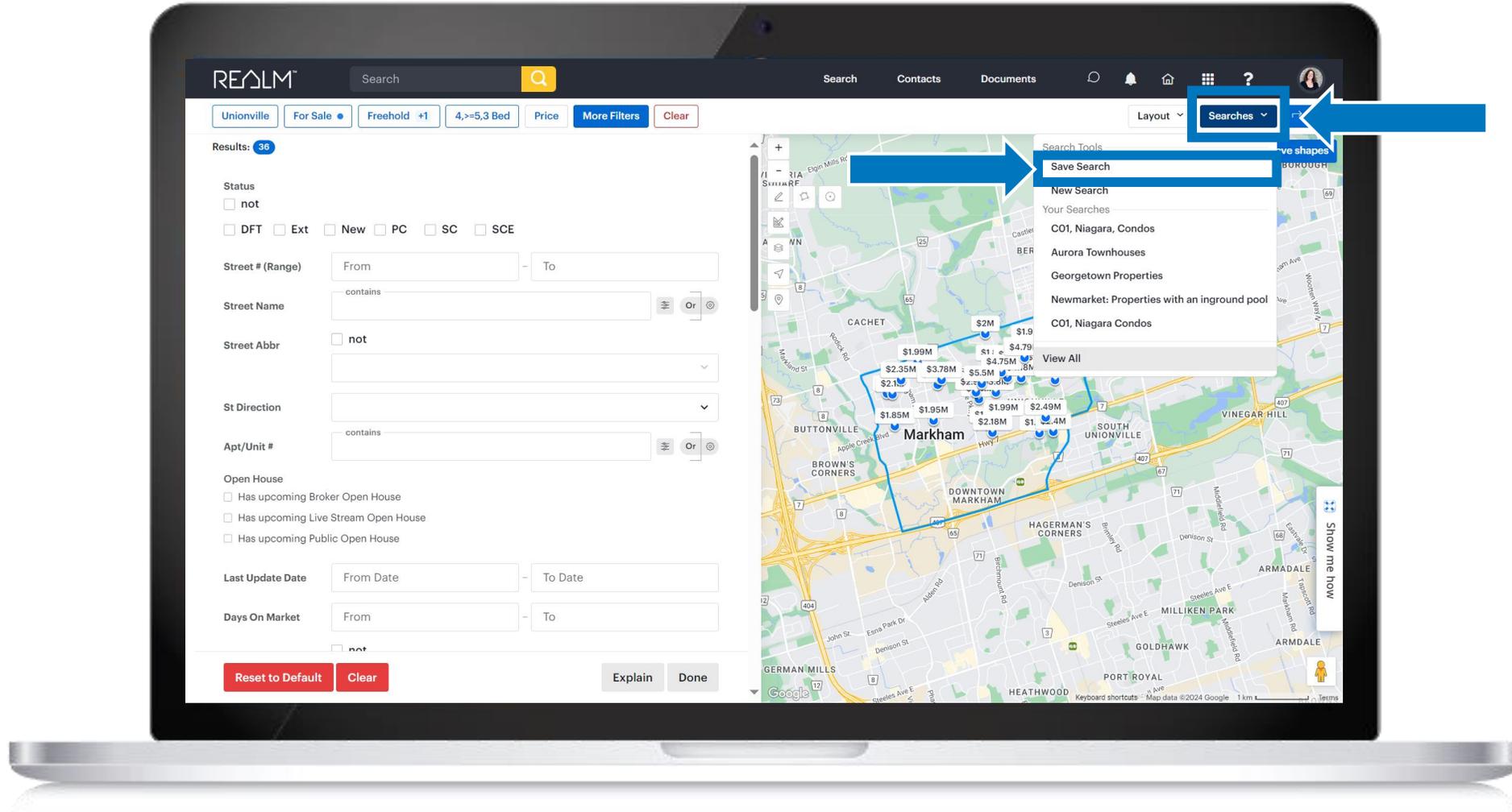
REALM™ Search



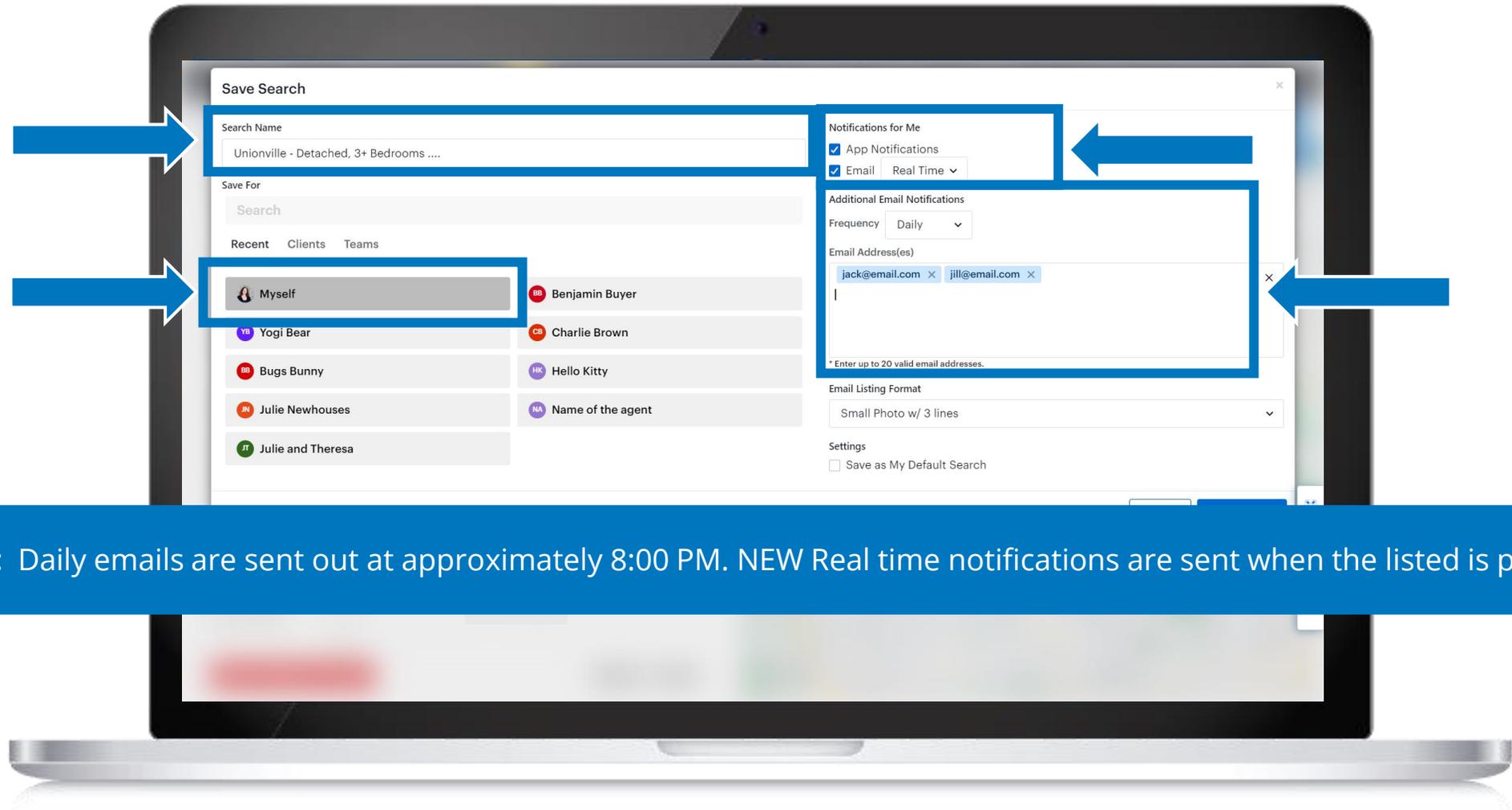
Tip: Choose filters with check boxes, radio buttons, from a drop down-down arrow, using date ranges and more...



REALM™ Save a Search



REALM™ Save Search

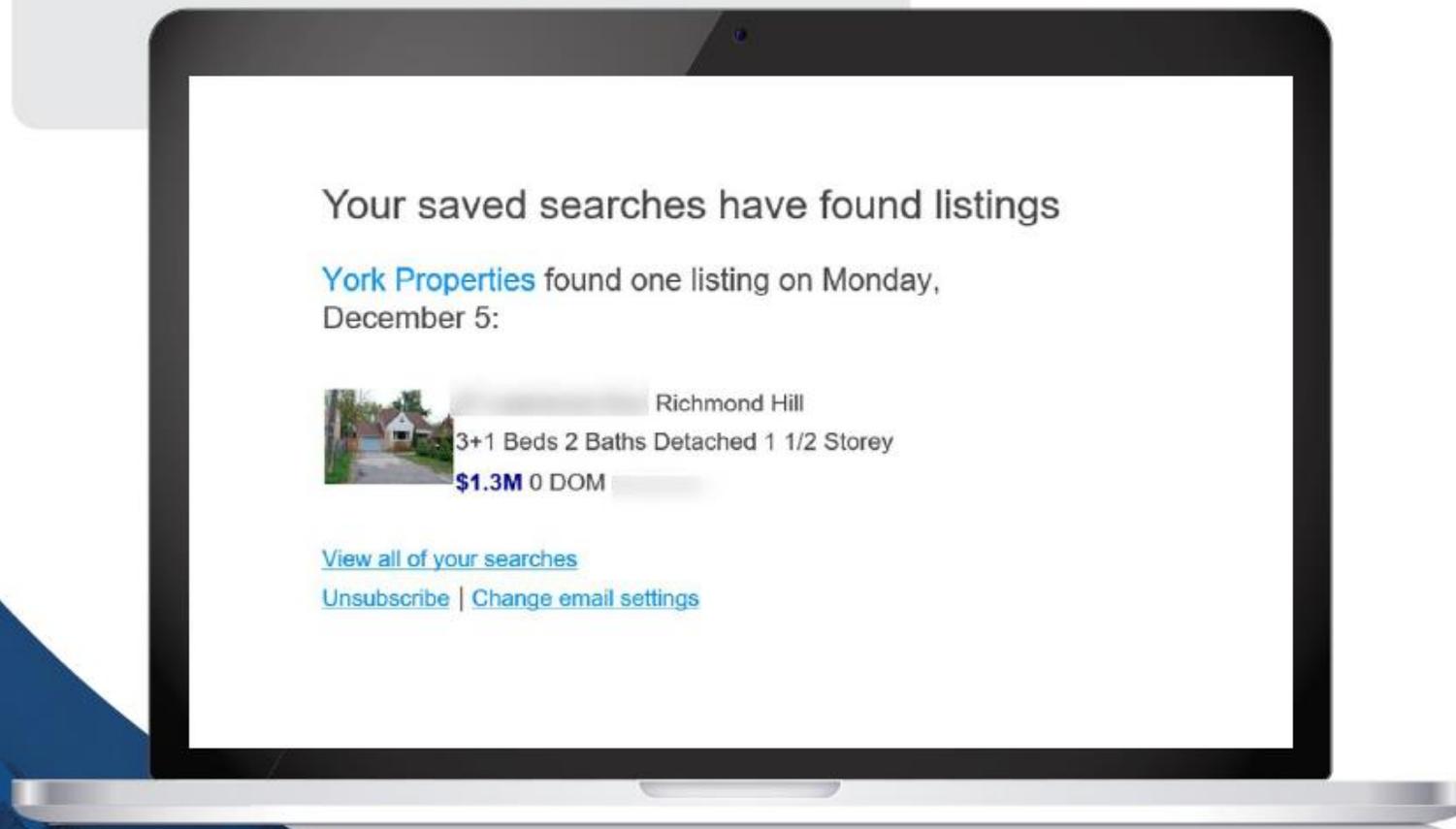


Tip: Daily emails are sent out at approximately 8:00 PM. NEW Real time notifications are sent when the listed is posted.

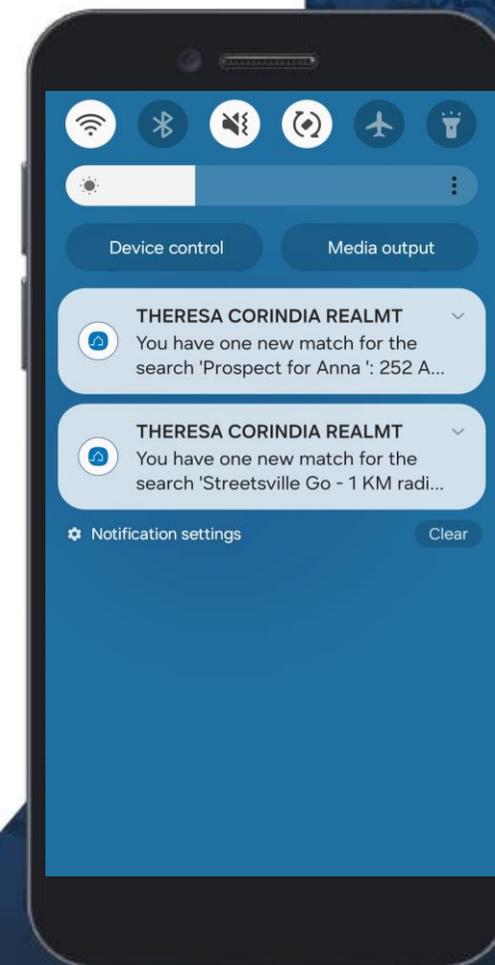
Notification

Be informed about important activities in real time!

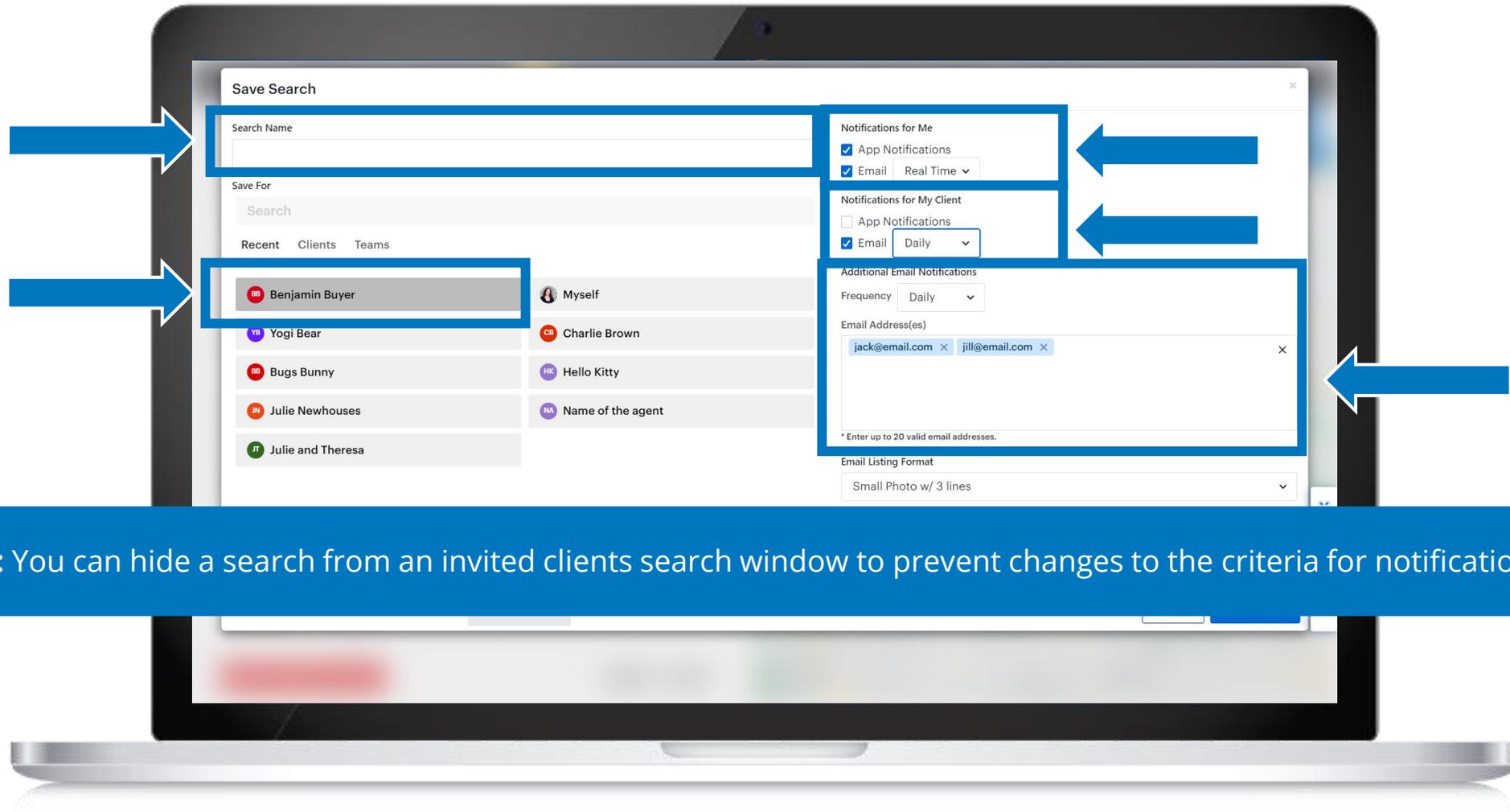
Email to your desktop and/or mobile



App Notifications (Push) to mobile



REALM™ Save Search



Tip: You can hide a search from an invited clients search window to prevent changes to the criteria for notifications.



Download Contacts

Step 1



Download contacts from Stratus

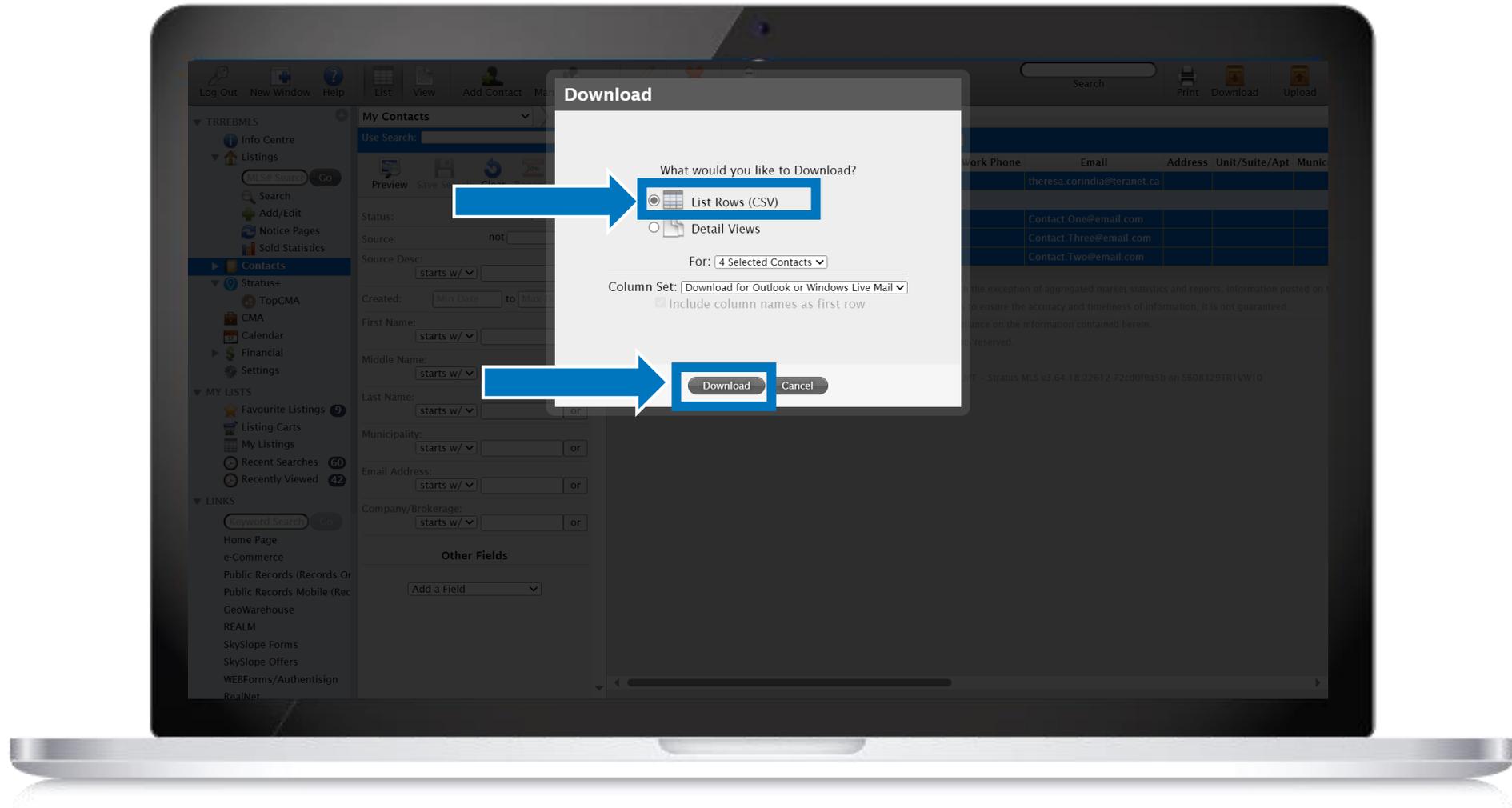
The screenshot shows the Stratus web application interface. The 'My Contacts' section is active, displaying a list of contacts with columns for First, Middle, Last, Related Person, Company, Home Phone, Work Phone, Email, Address, Unit/Suite/Apt, and Municipality. The contacts listed are Ben Buyer, Contact Four, Contact One, Contact Three, and Contact Two. A blue arrow points to the 'Download' button in the top right corner. Another blue arrow points to the 'Contacts' menu item in the left sidebar.

	First	Middle	Last	Related Person	Company	Home Phone	Work Phone	Email	Address	Unit/Suite/Apt	Muni
<input checked="" type="checkbox"/>	Ben		Buyer					theresa.corindia@teranet.ca			
<input checked="" type="checkbox"/>	Contact		Four			(416) 555-1212					
<input checked="" type="checkbox"/>	Contact		One					Contact.One@email.com			
<input checked="" type="checkbox"/>	Contact		Three					Contact.Three@email.com			
<input checked="" type="checkbox"/>	Contact		Two					Contact.Two@email.com			

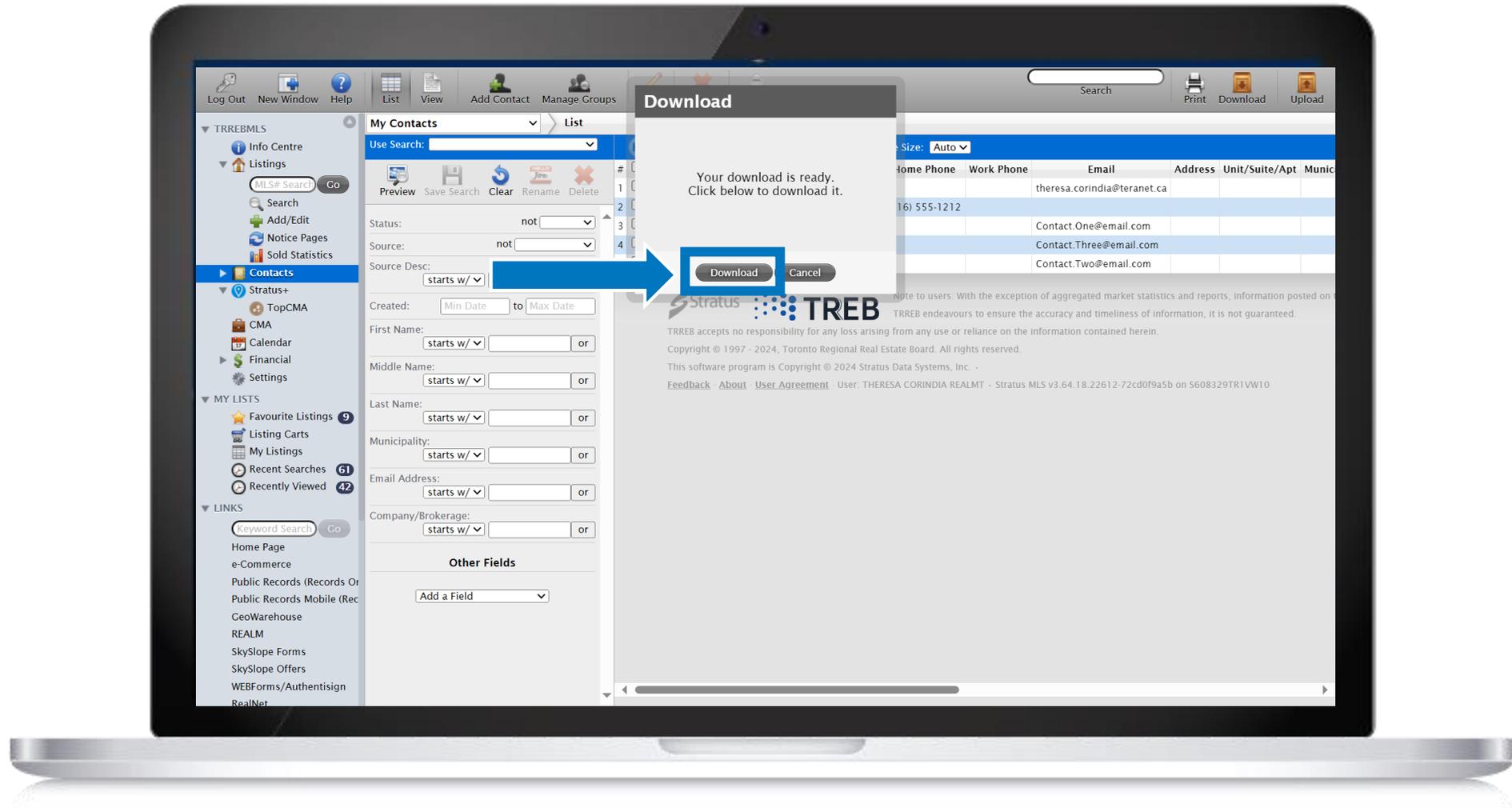
Tip: Place a check beside the client's name to choose this contact. If none are **selected** then all will download.



Download contacts from Stratus



Download contacts from Stratus



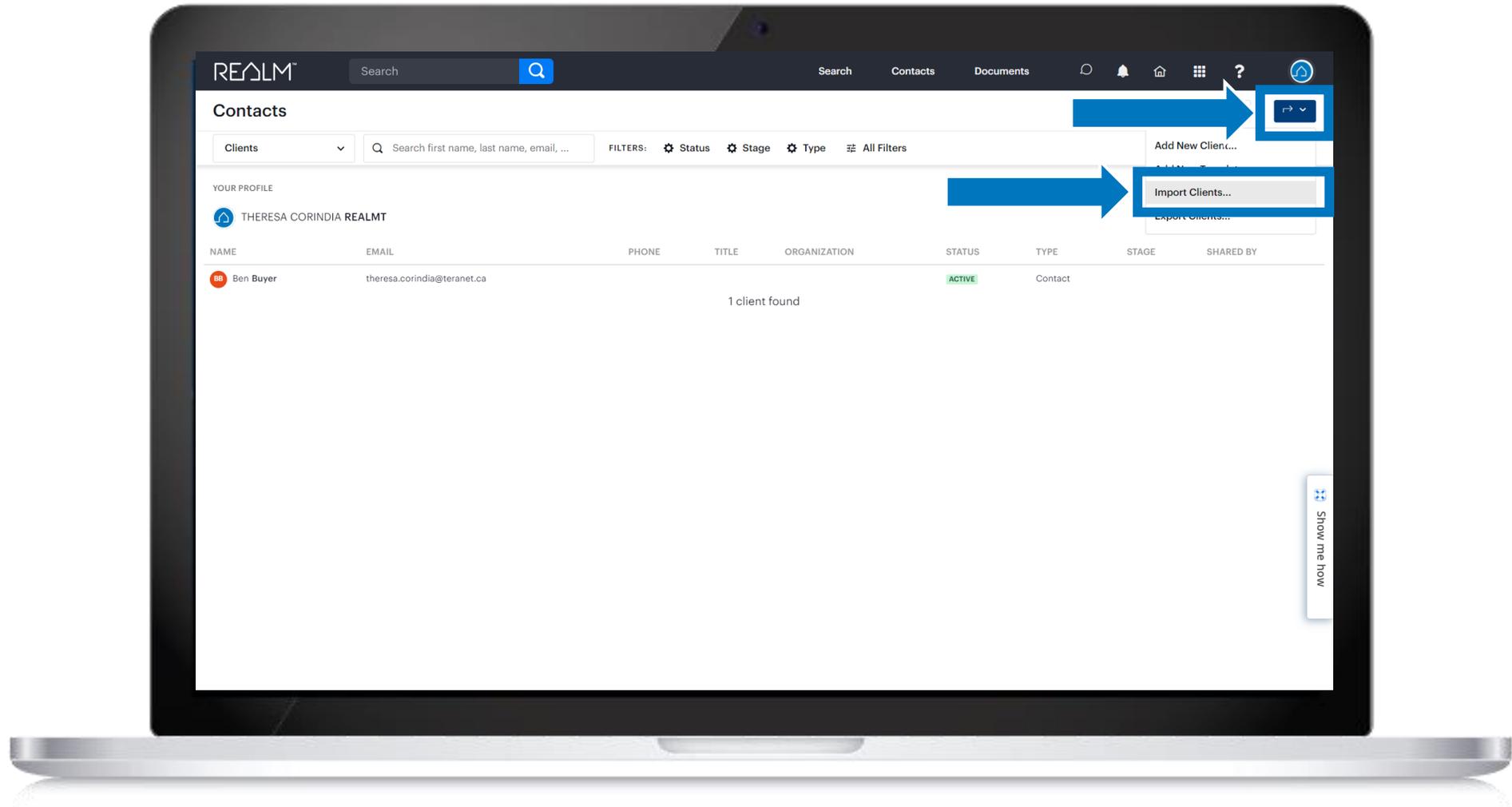
REALM™

Import Contacts

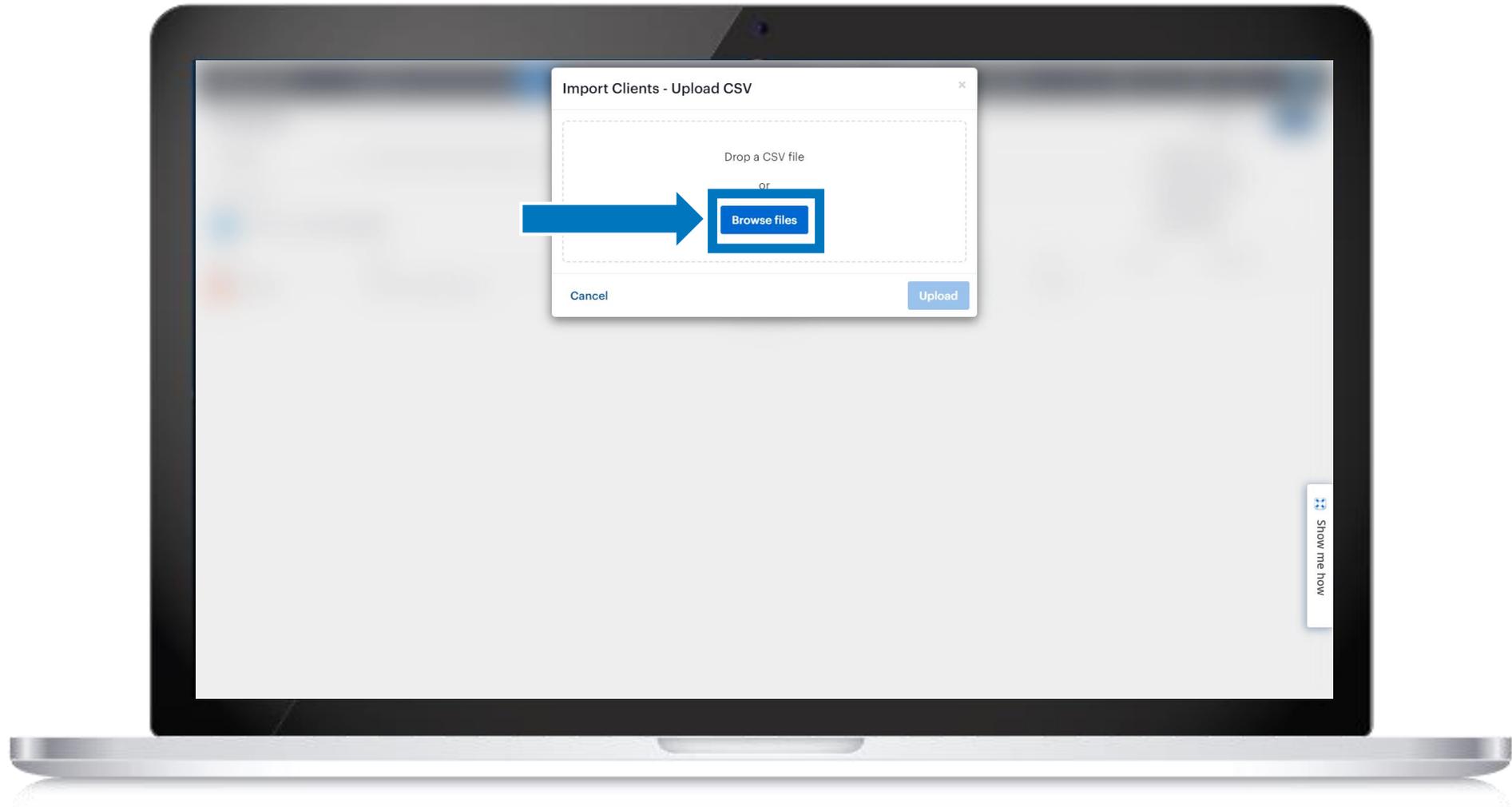
Step 2



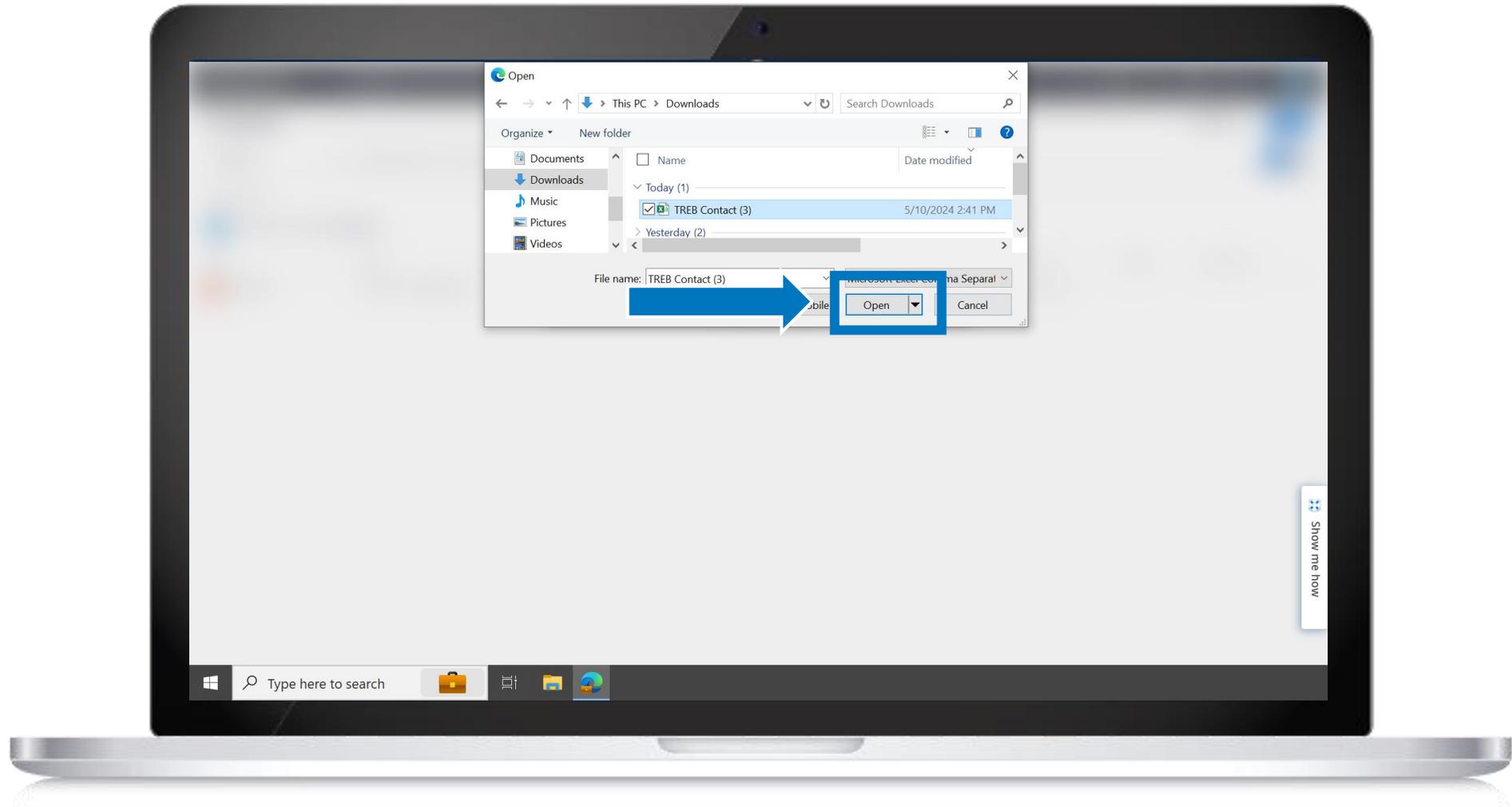
Import Contacts into REALM™



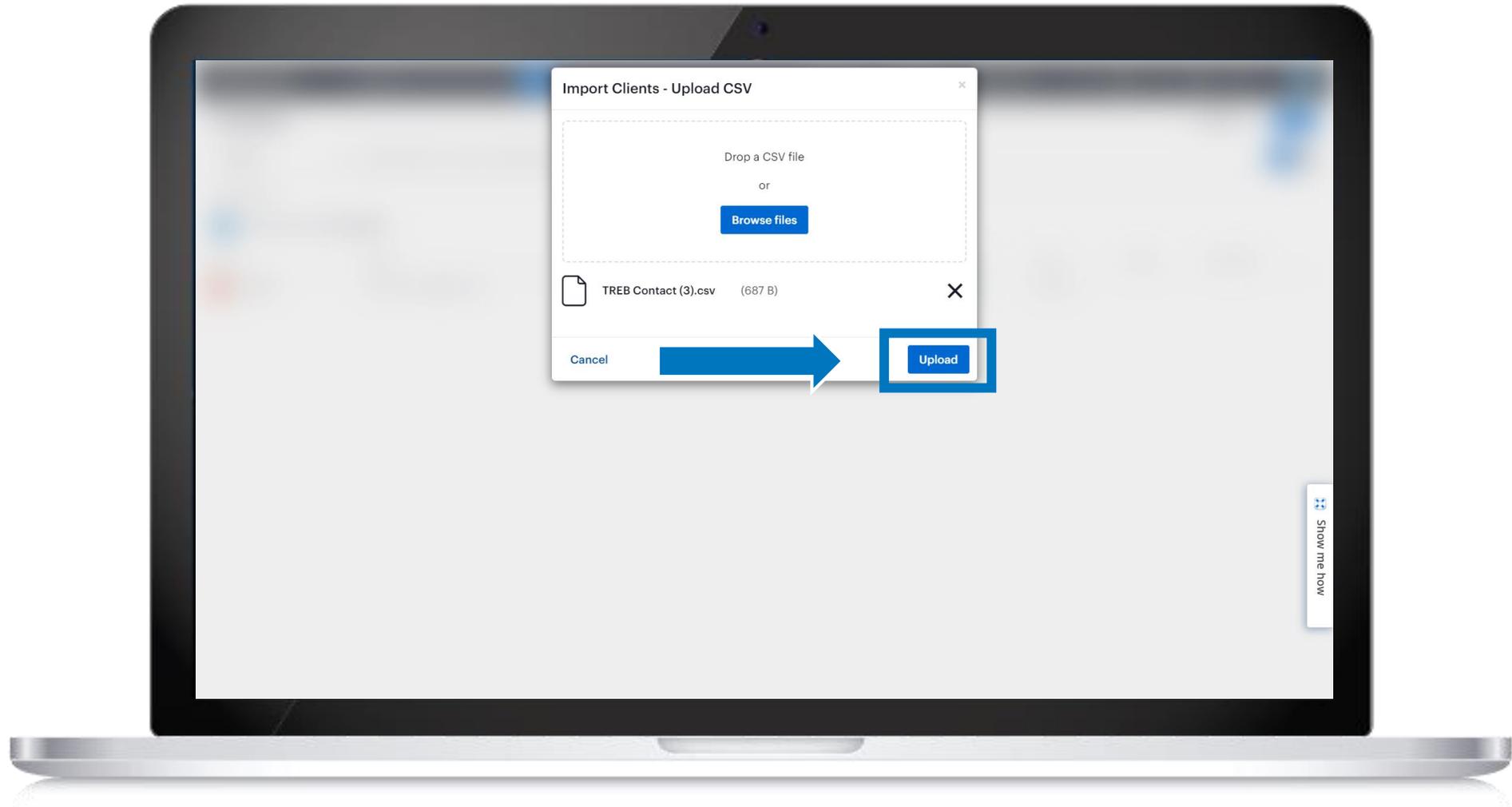
Import Contacts into REALM™



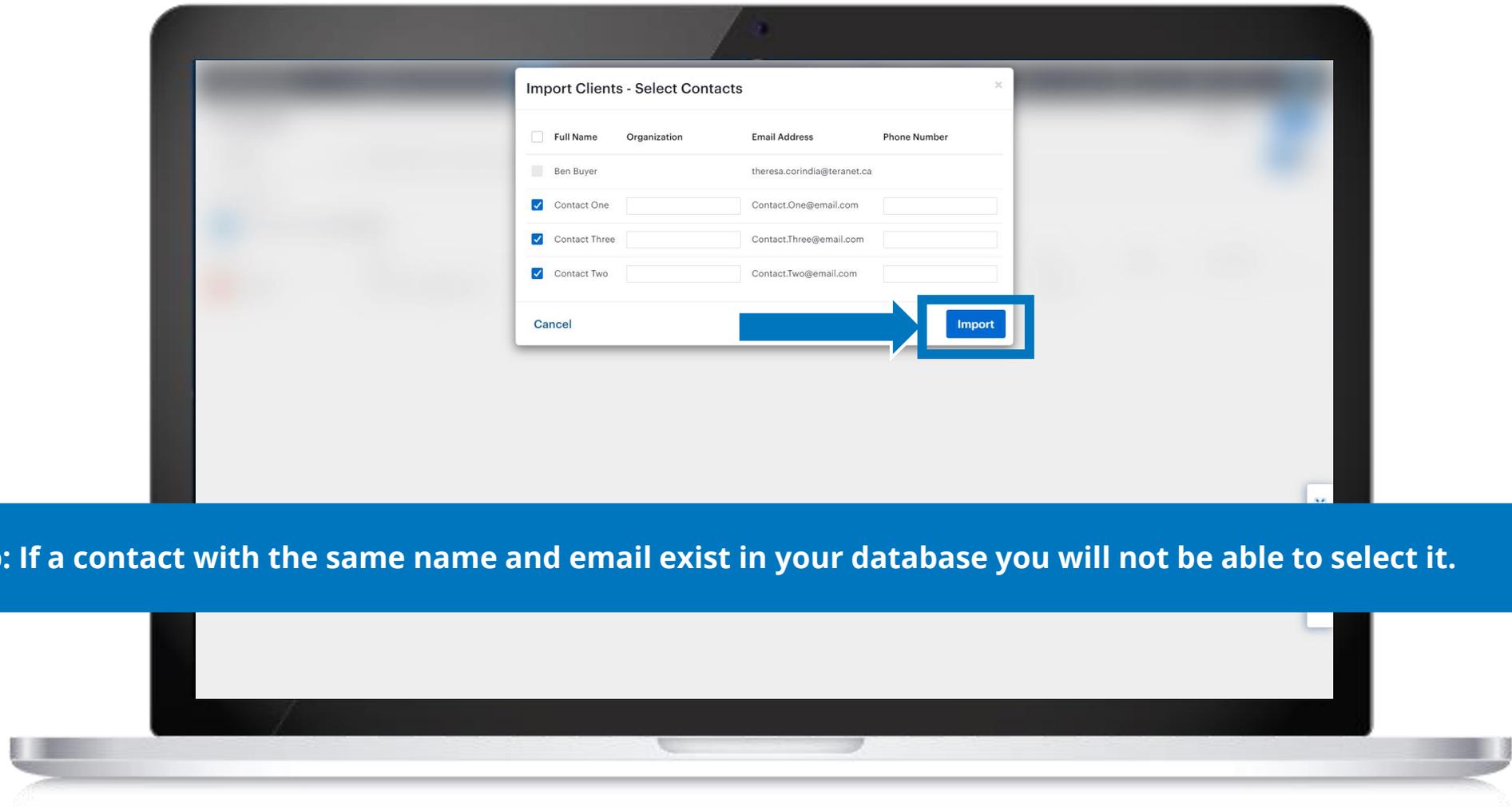
Import Contacts into REALM™



Import Contacts into REALM™

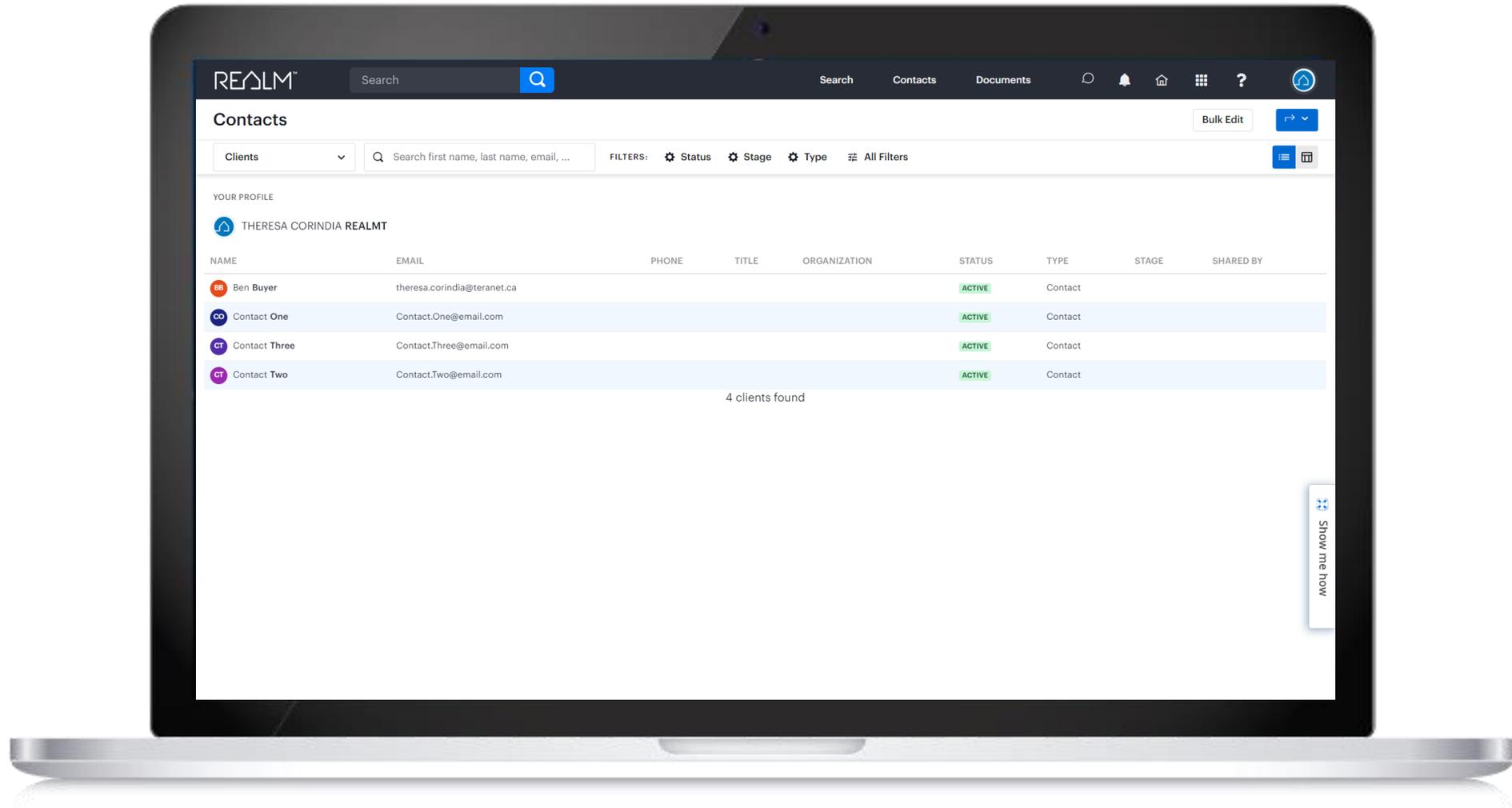


Import Contacts into REALM™



Tip: If a contact with the same name and email exist in your database you will not be able to select it.

Import Contacts into REALM™

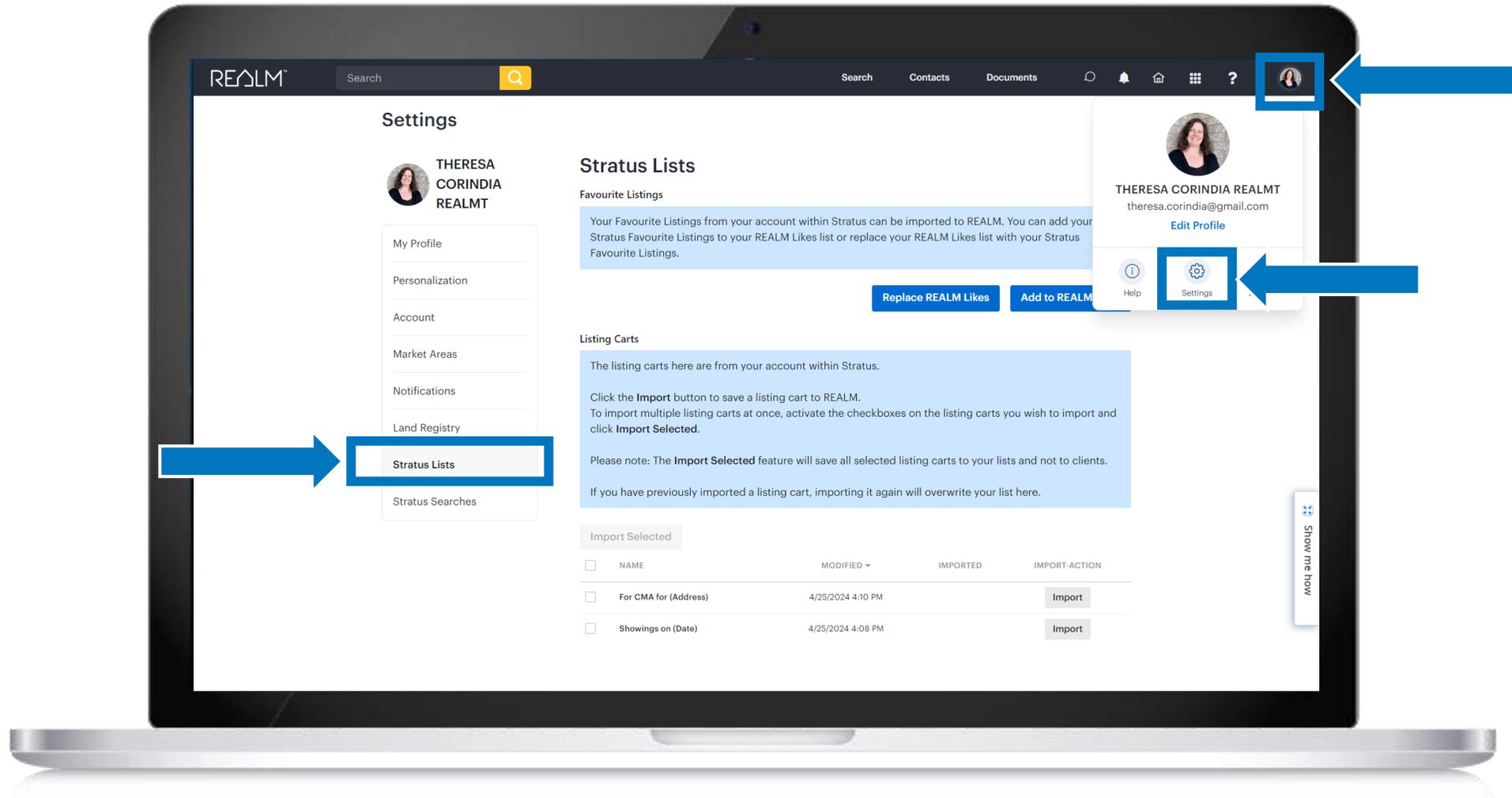


REALM™

Import Favourite Listings



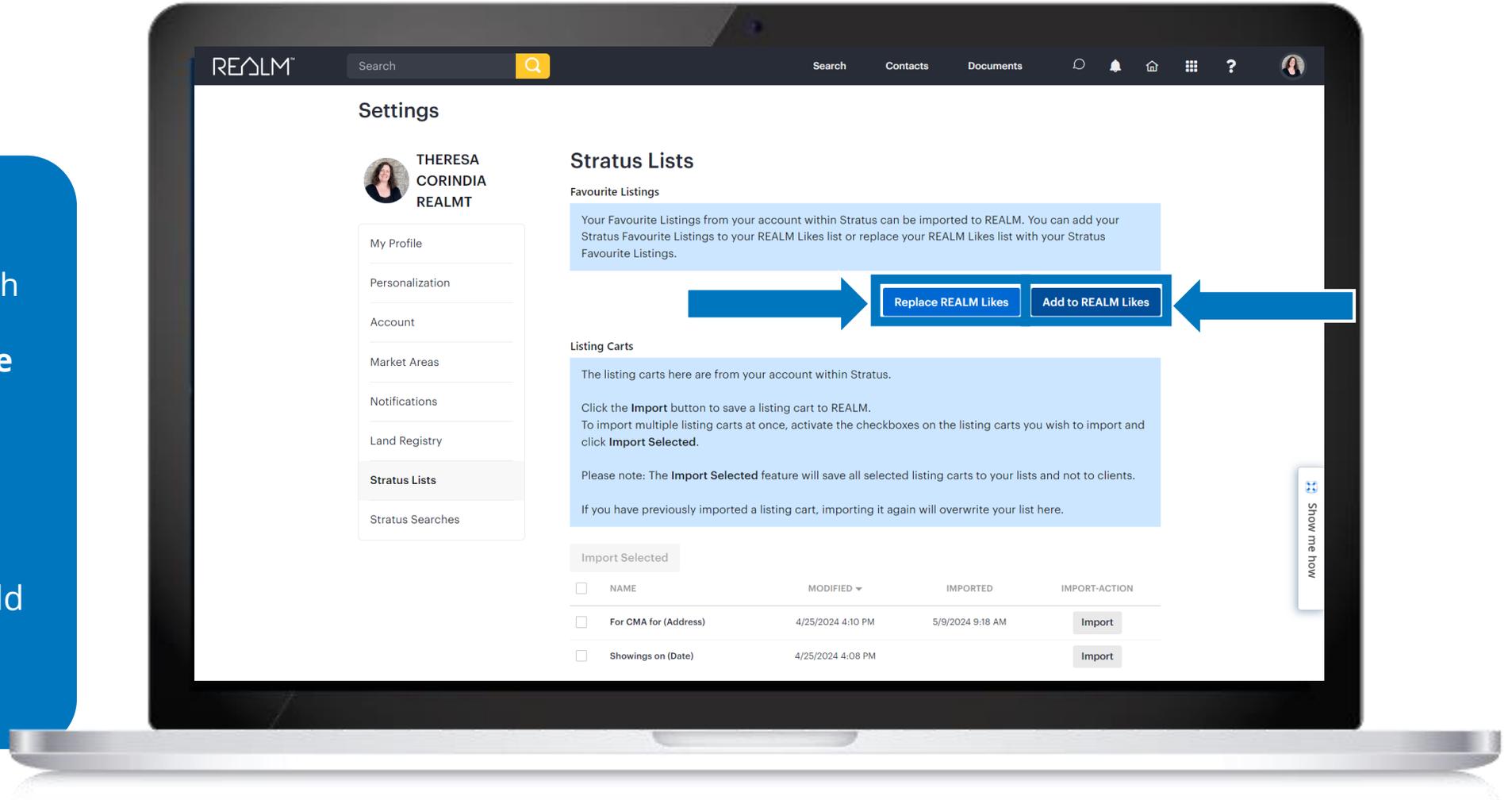
Import Favourite Listings into REALM™



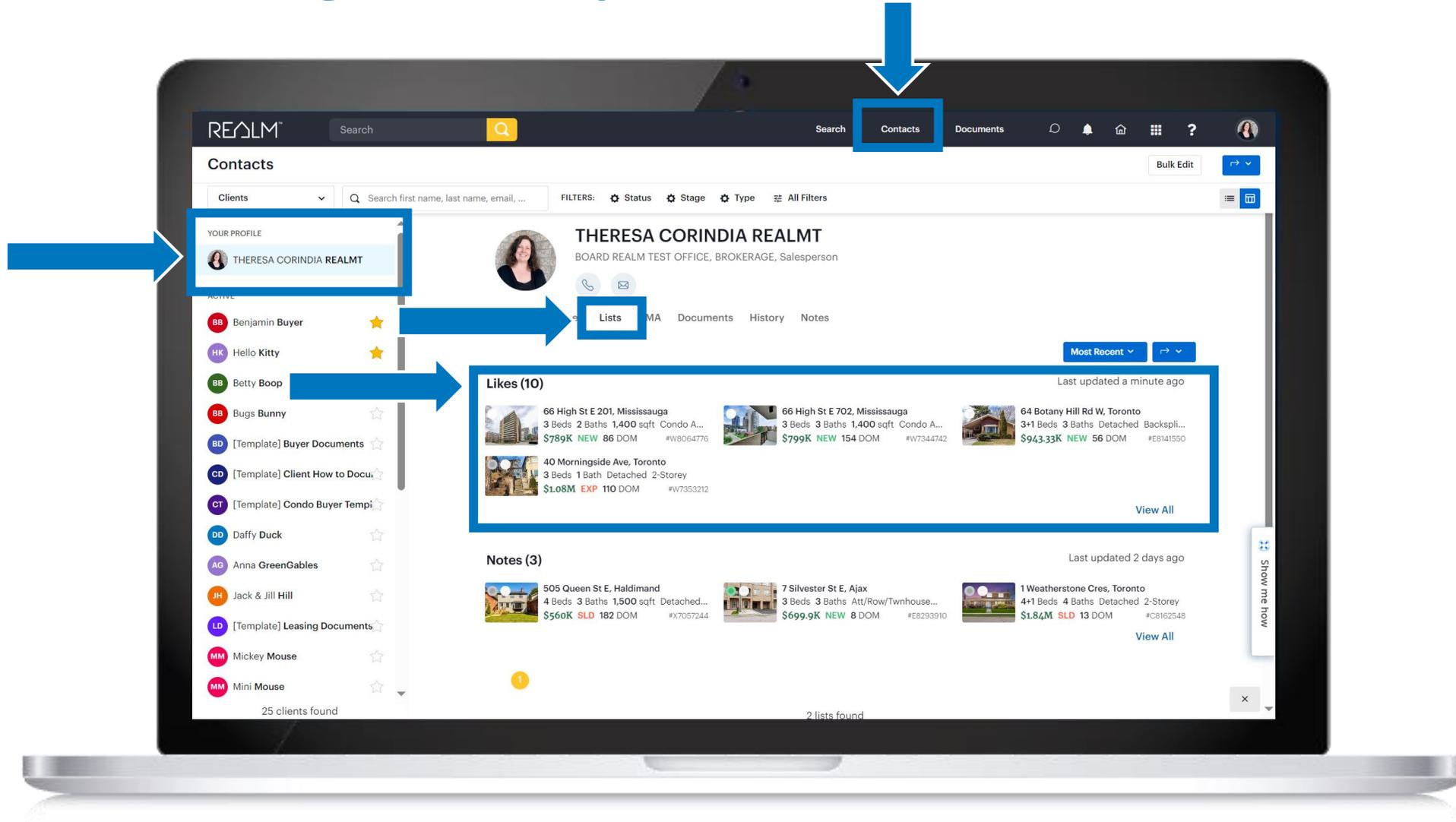
Import Favourite Listings into REALM™



- 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**.



Your Favourite Listing will be in your Likes List in Contacts

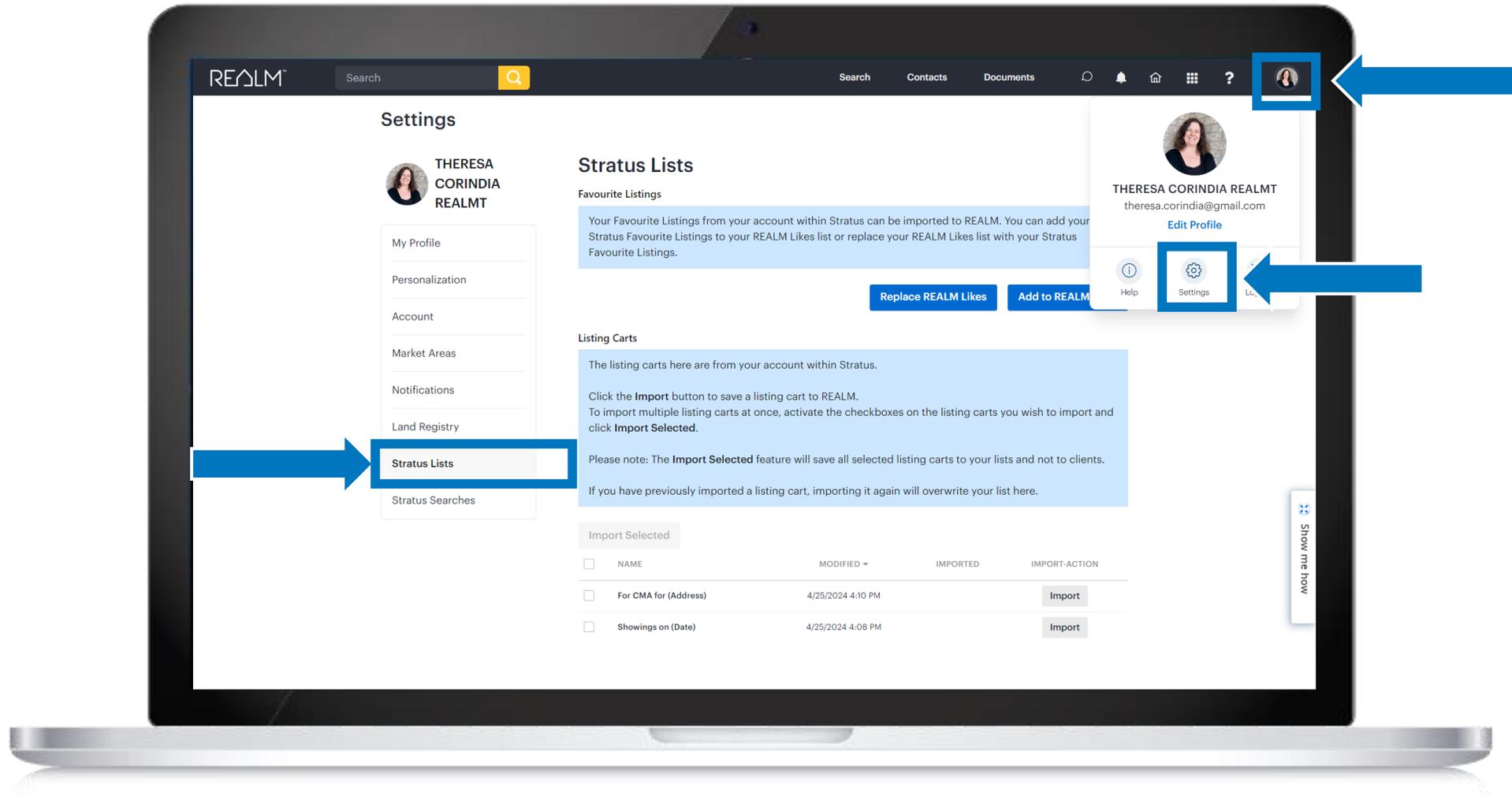


REALM™

Import Listing Carts

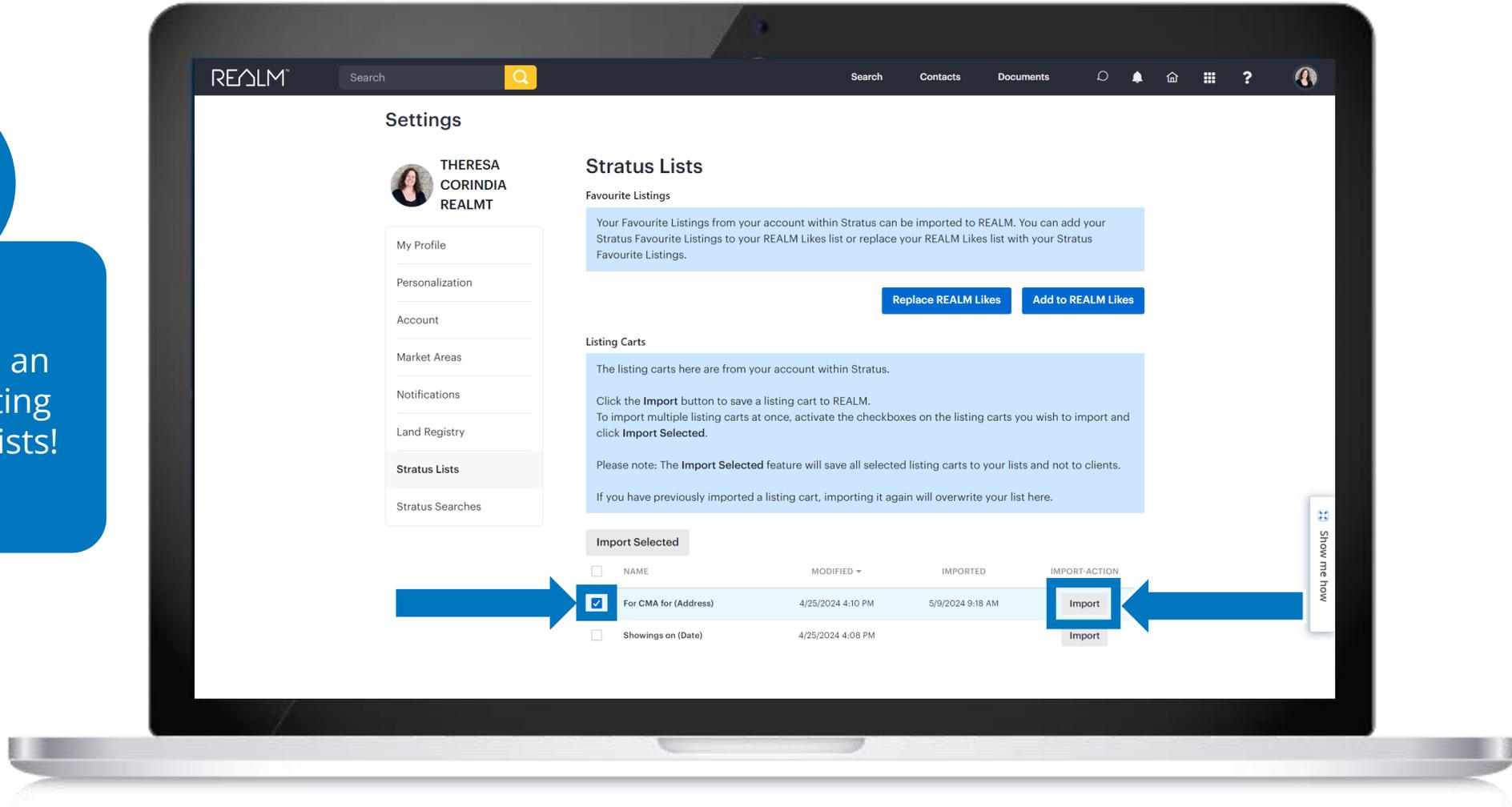


Import Listing Carts into REALM™

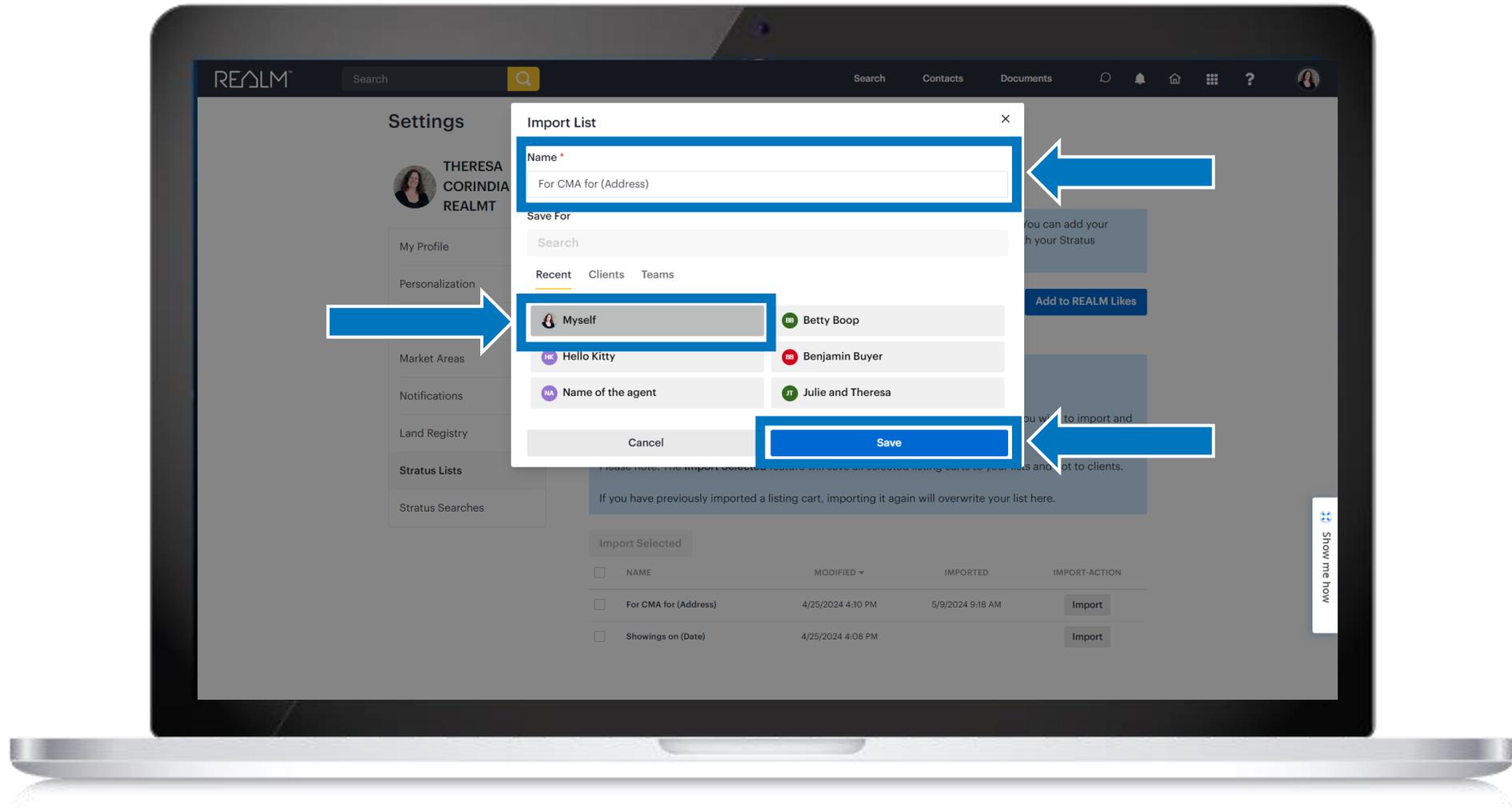


Import Listing Carts into REALM™

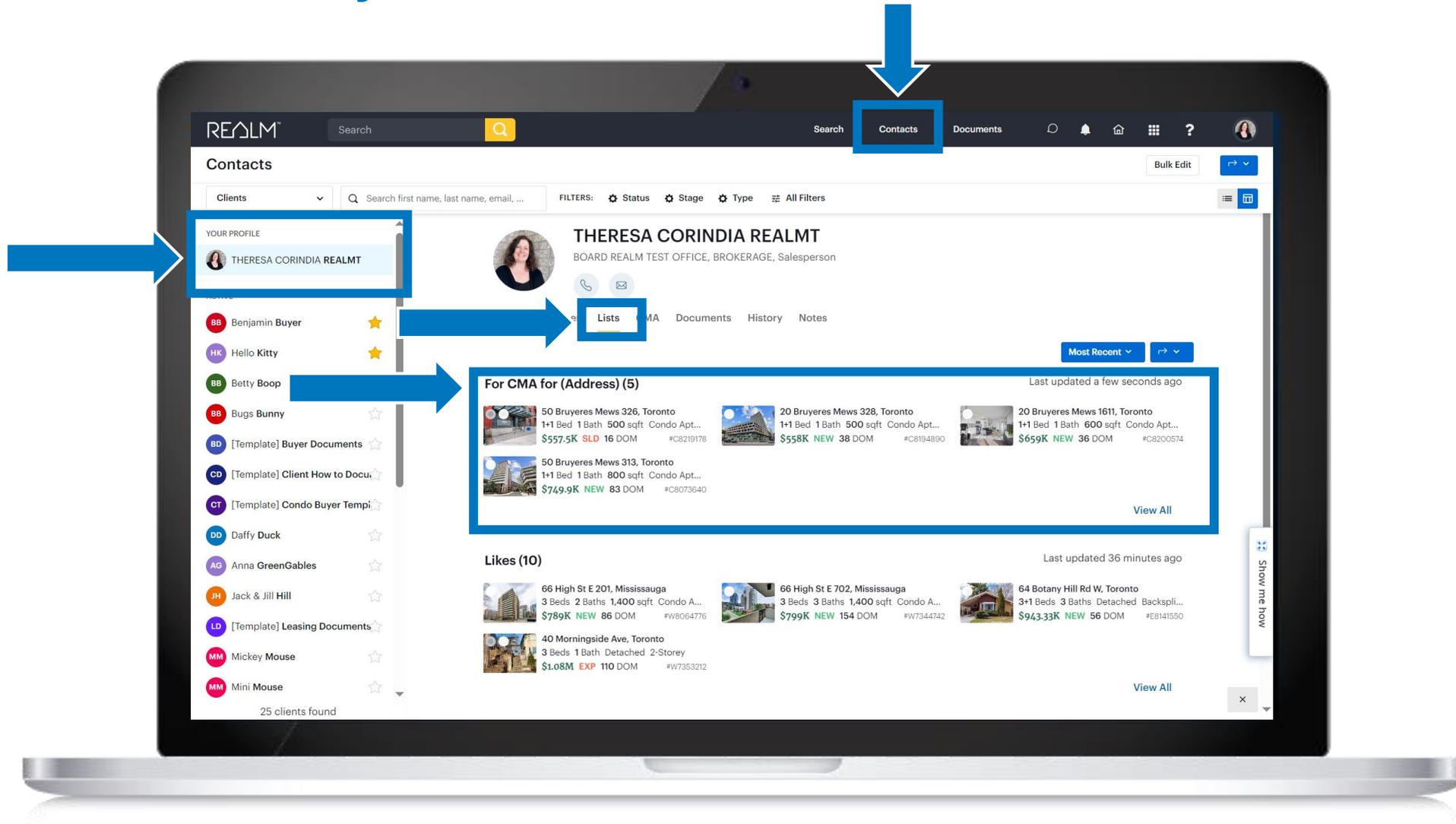

You can save an individual listing cart to your lists!



Import Listing Carts into REALM™



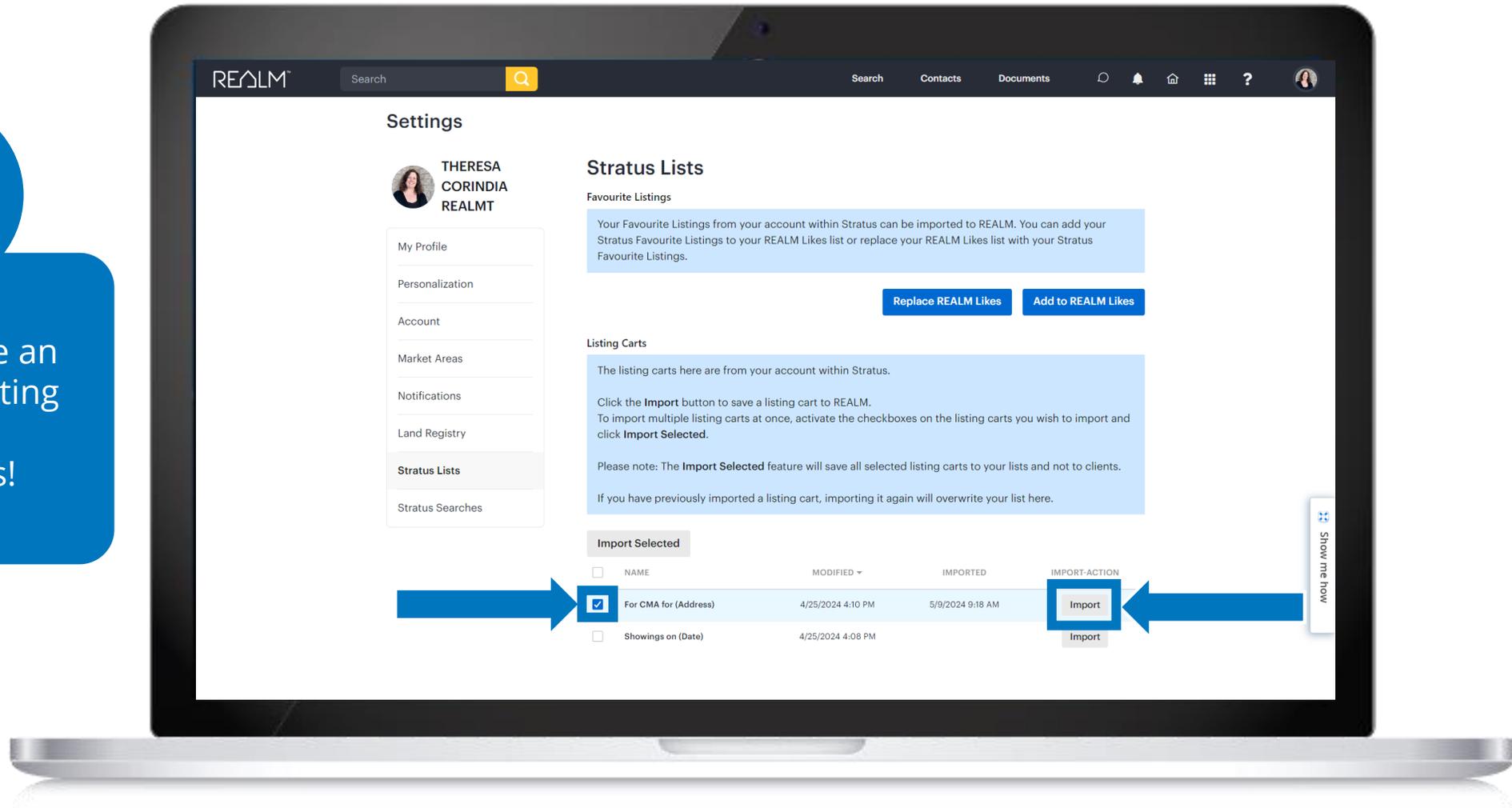
Listing Carts will be in your Lists in Contacts



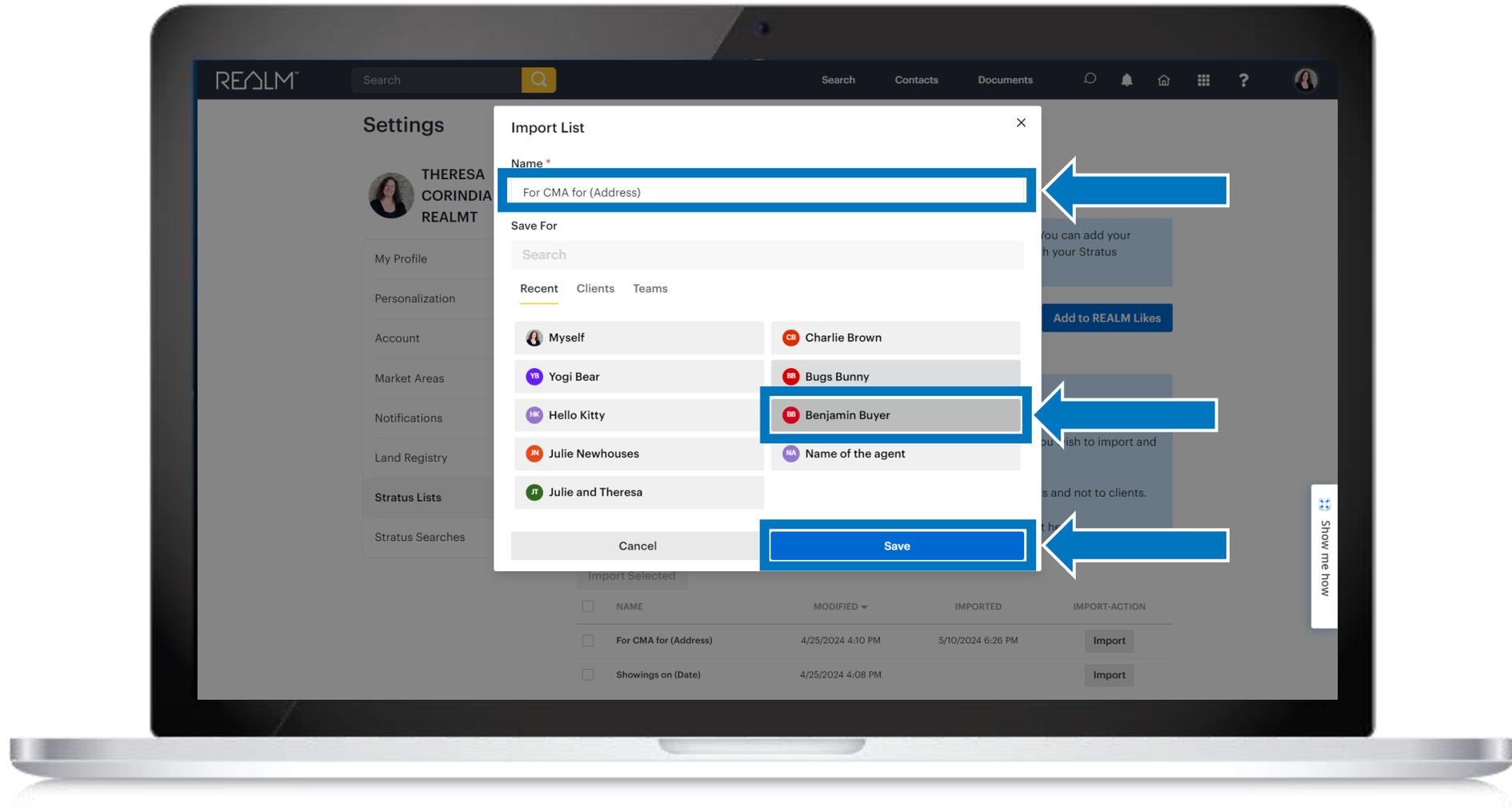
Import Listing Carts into REALM™



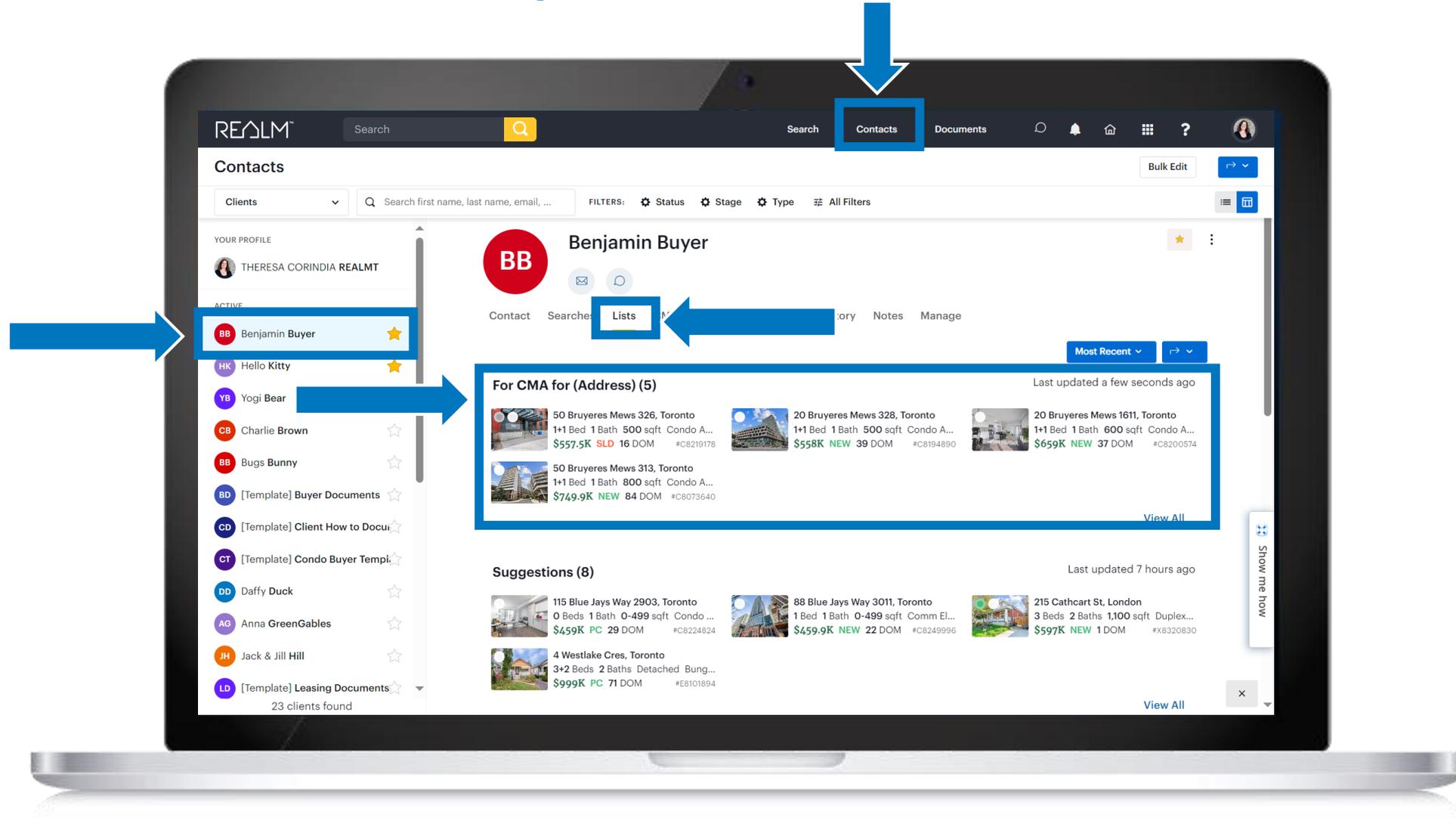
You can save an individual listing cart to your contacts lists!



Import Listing Carts into REALM™

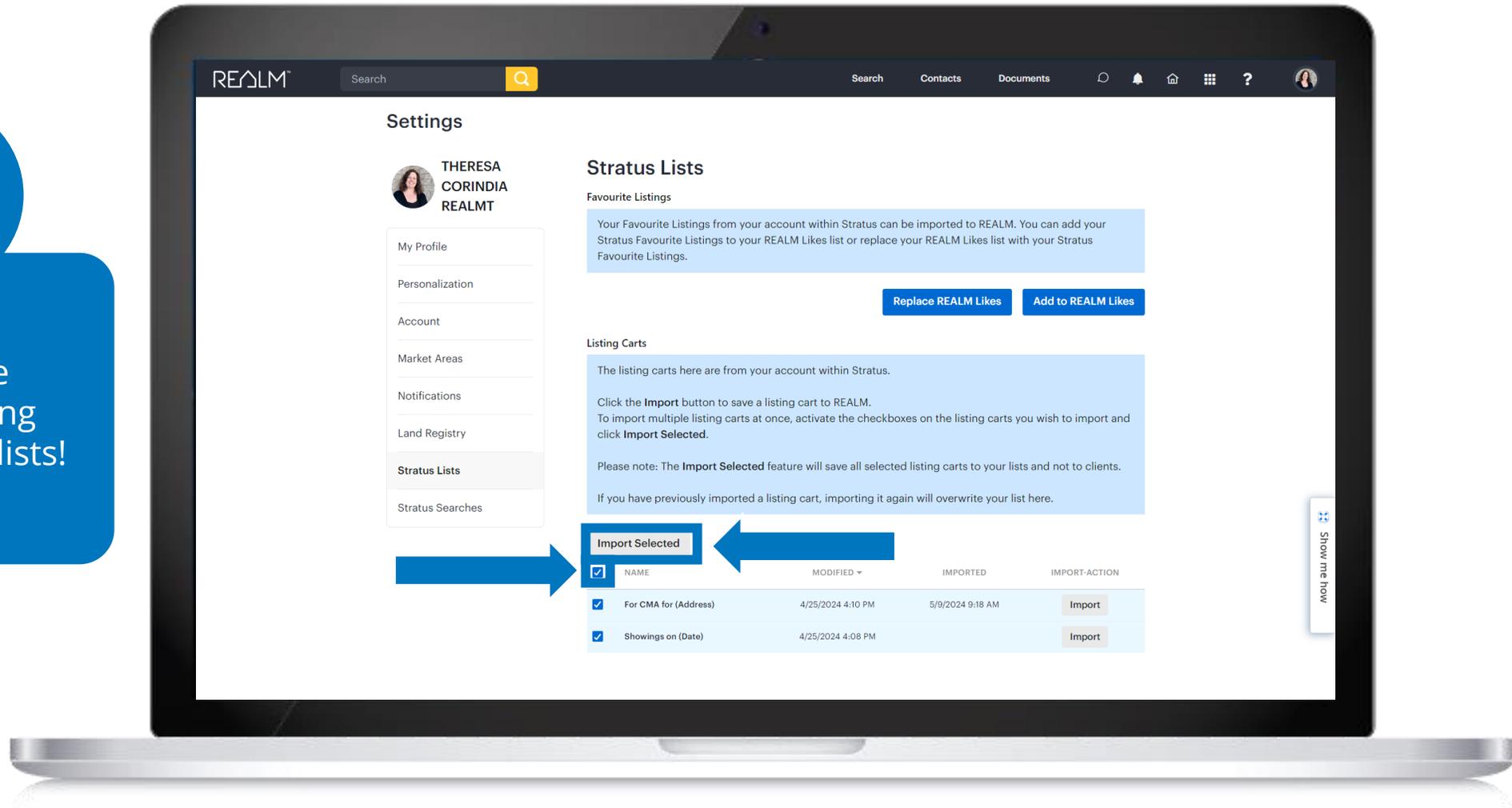


Listing Carts will be added to your Contacts Lists

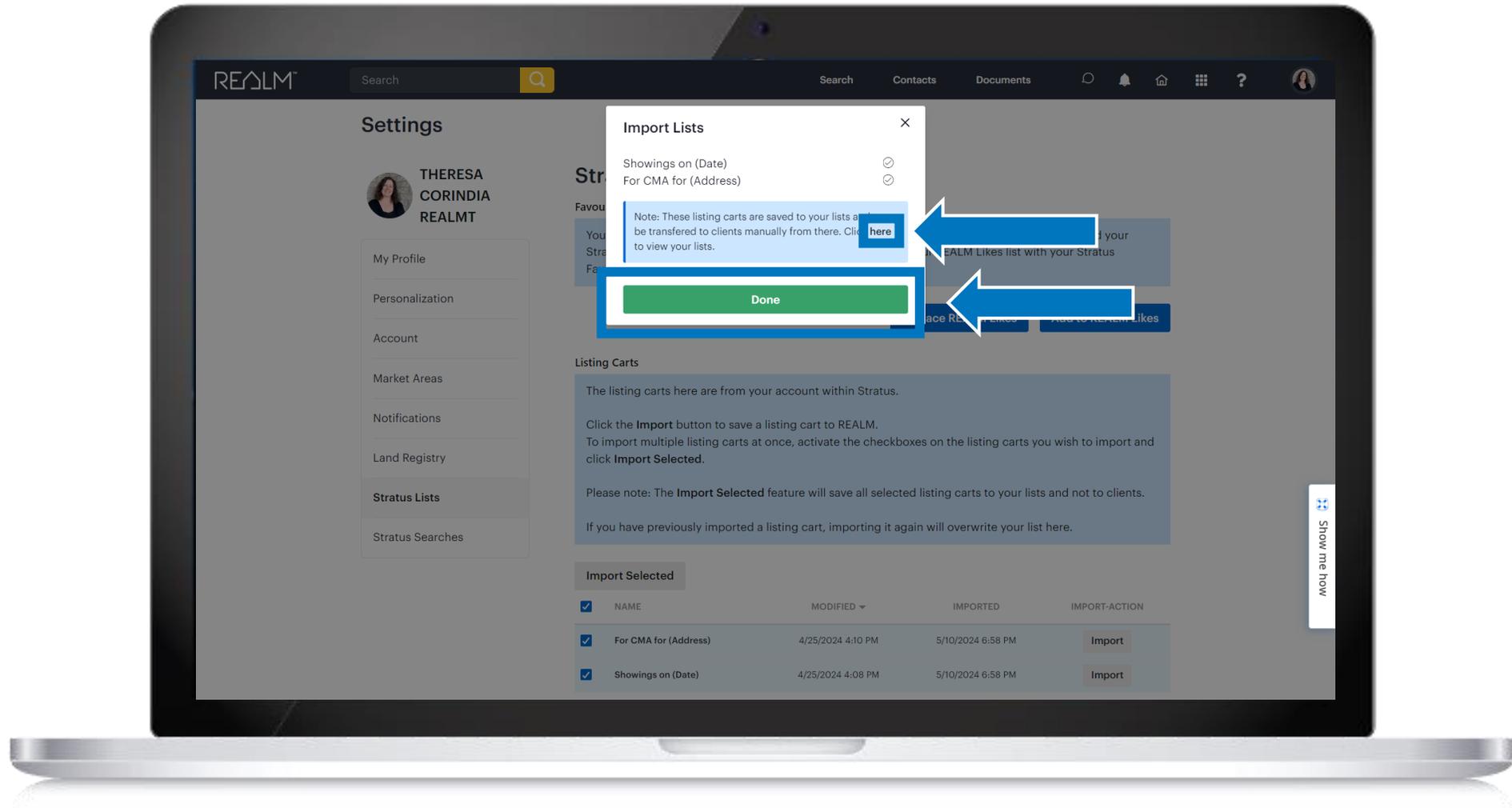


Import Listing Carts into REALM™

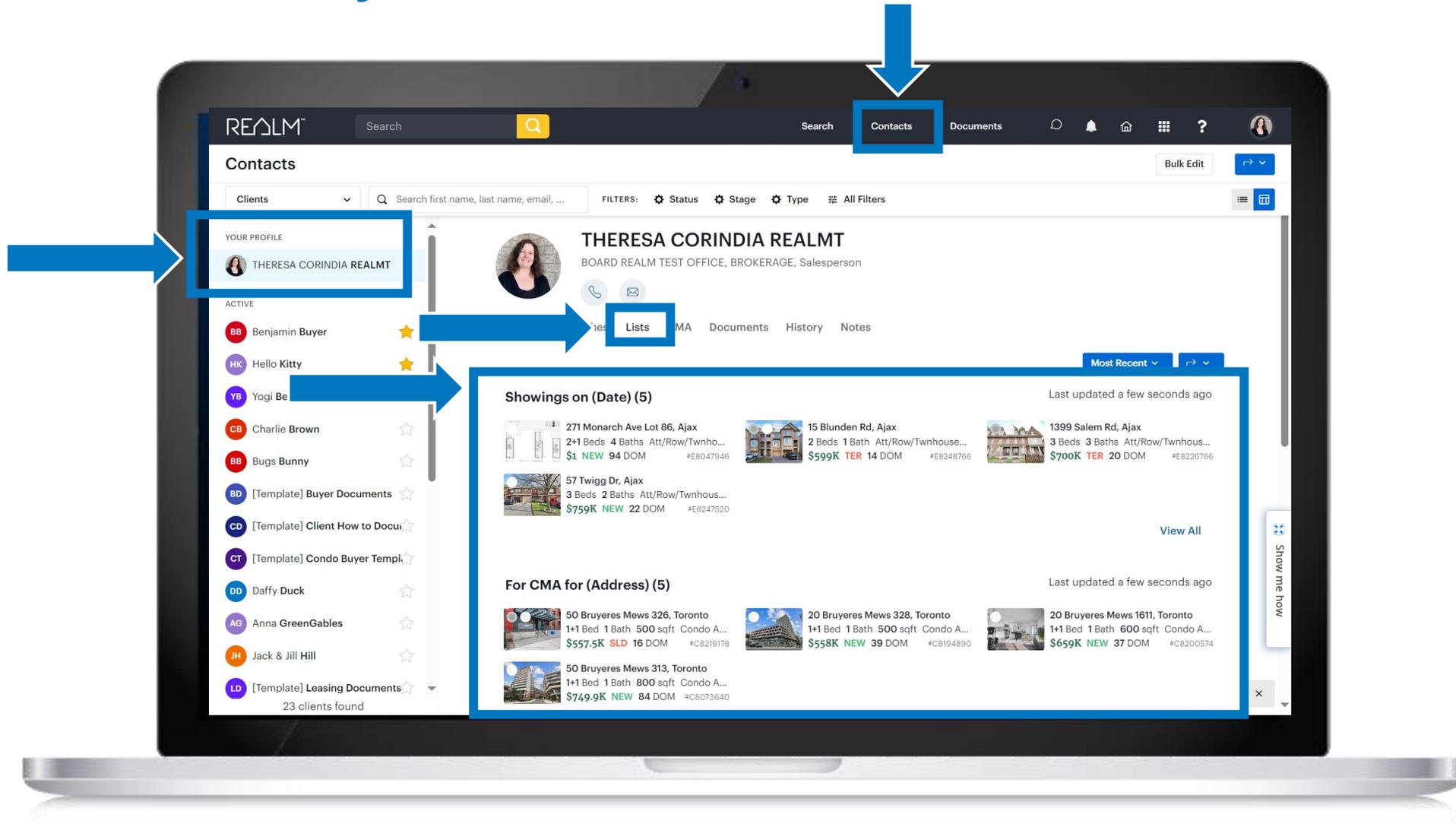

You can save multiple listing cart to your lists!



Import Listing Carts into REALM™



Listing Carts will be in your Lists in Contacts

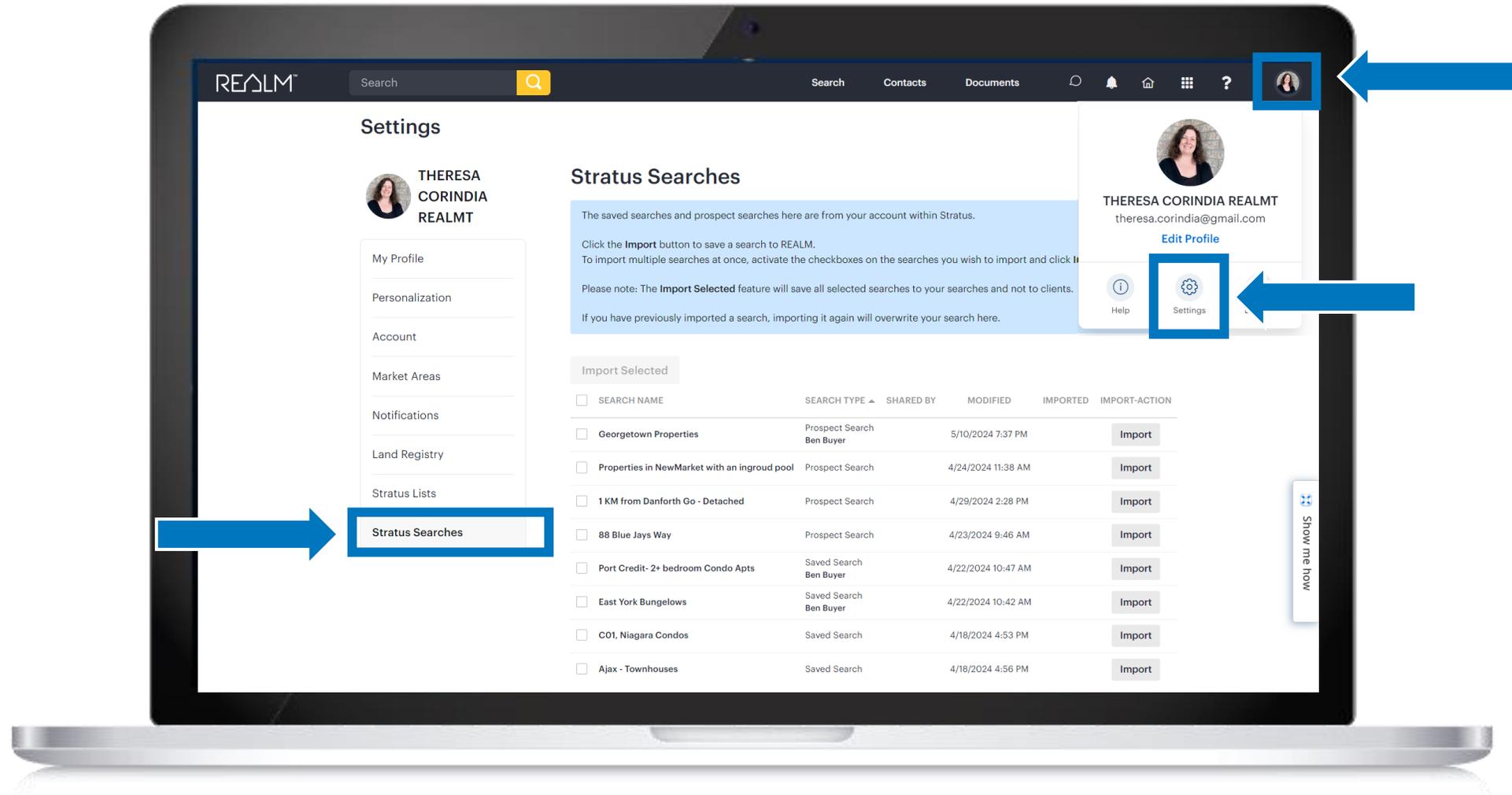


REALM™

Stratus Searches

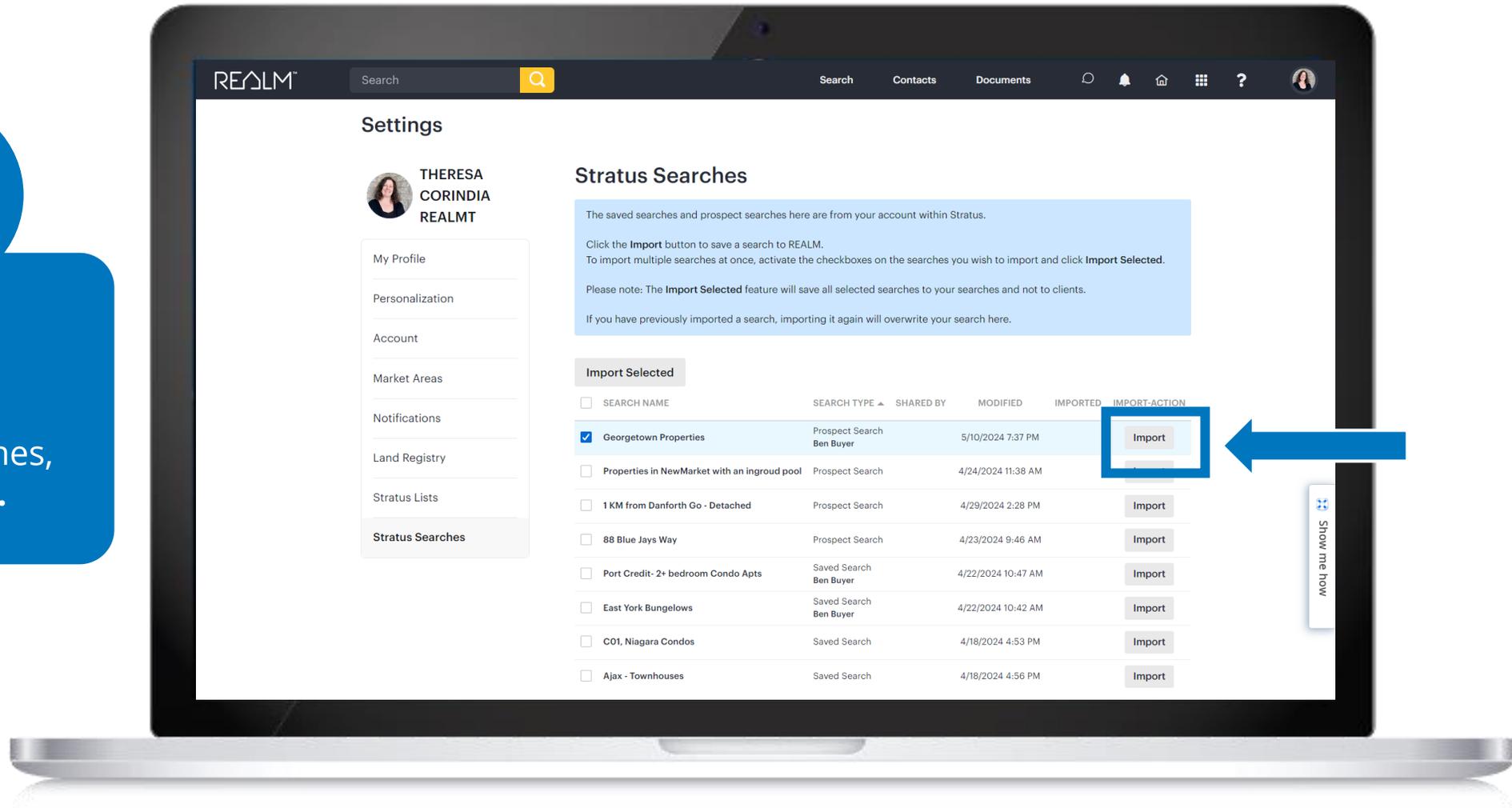


Import your Stratus Searches into REALM™



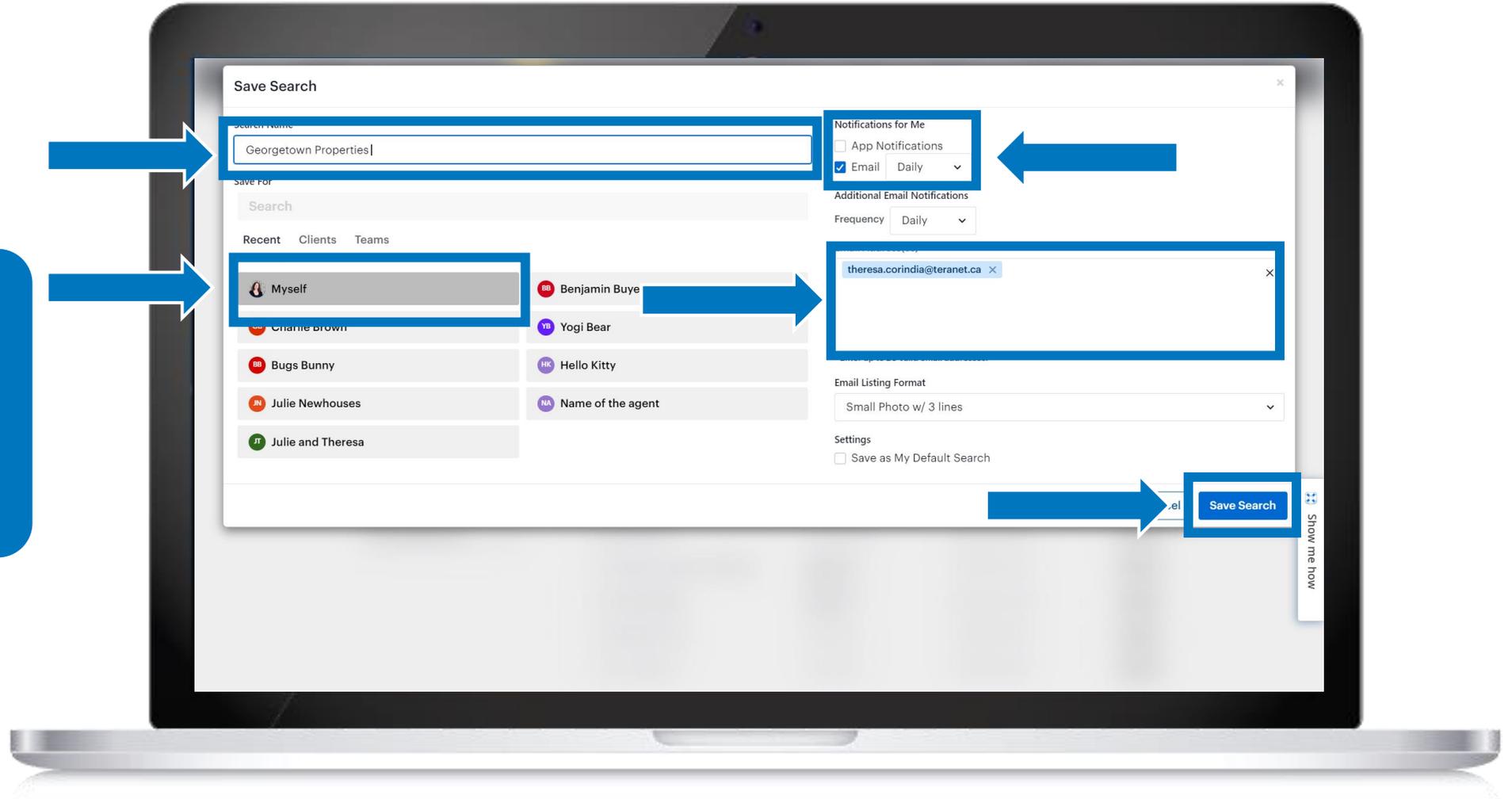
Import your Stratus Searches into REALM™


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

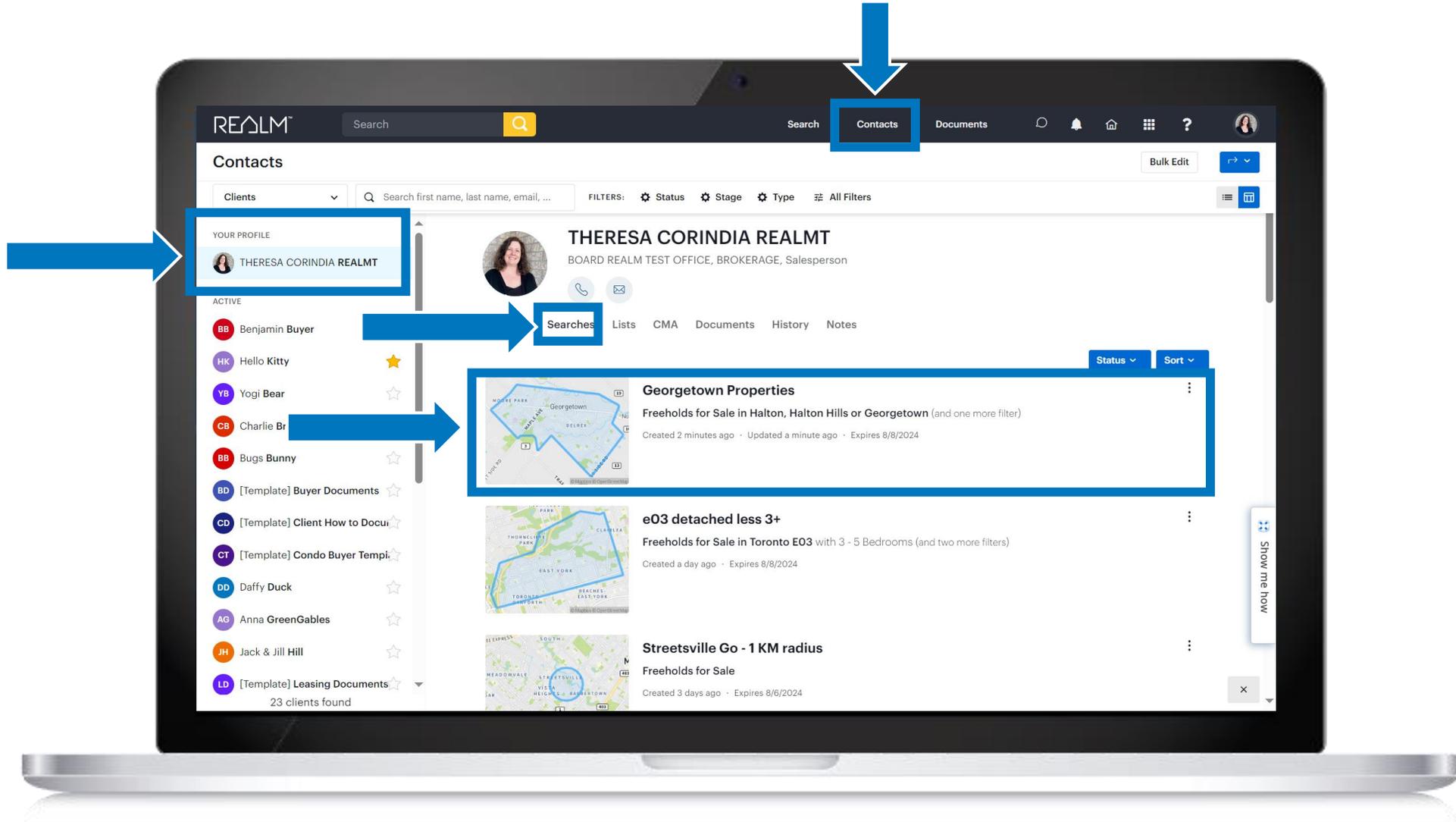


Import your Stratus Searches into REALM™


You can save an individual searches for you!

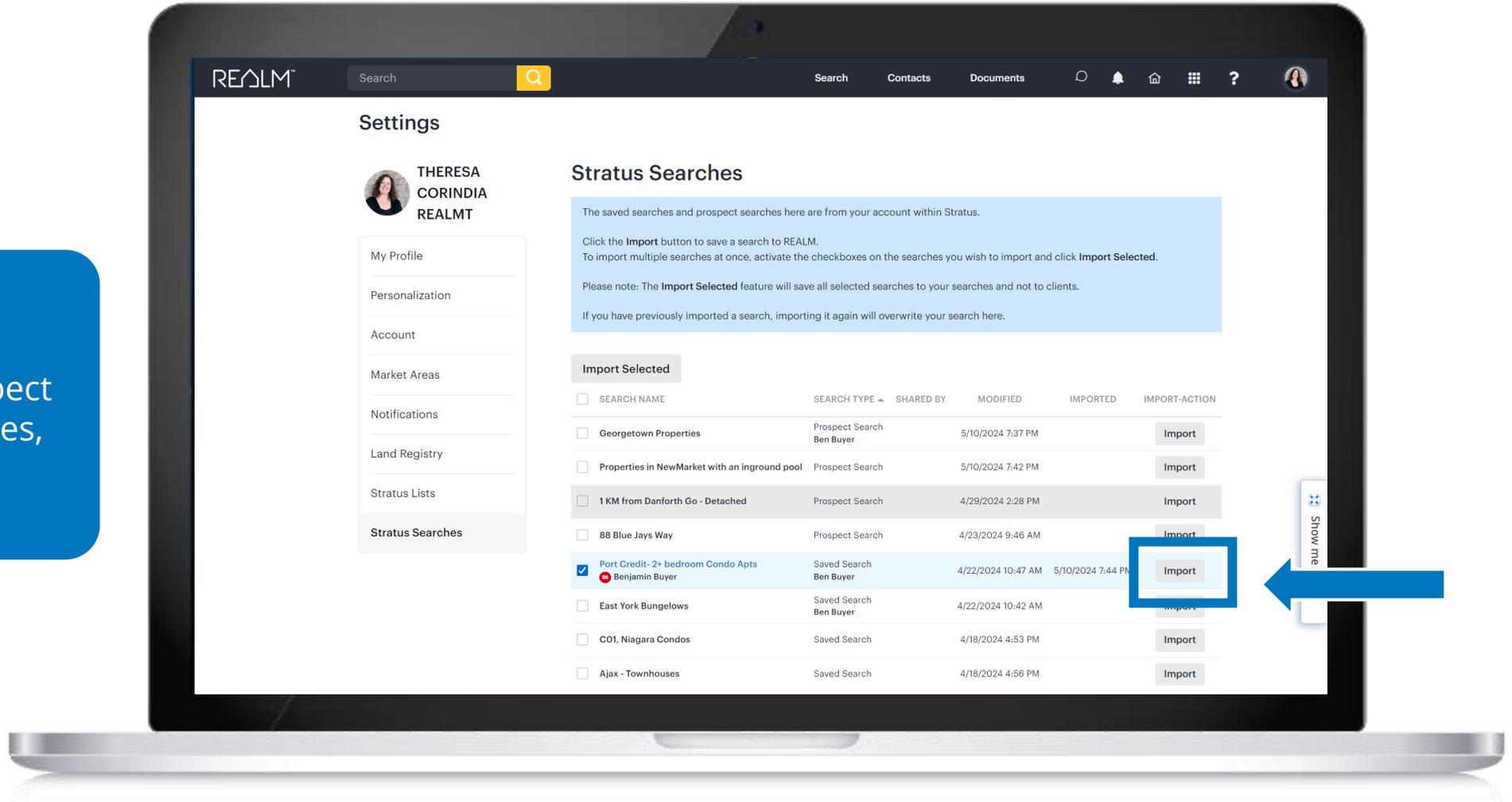


Searches saved for you will be added to your Searches



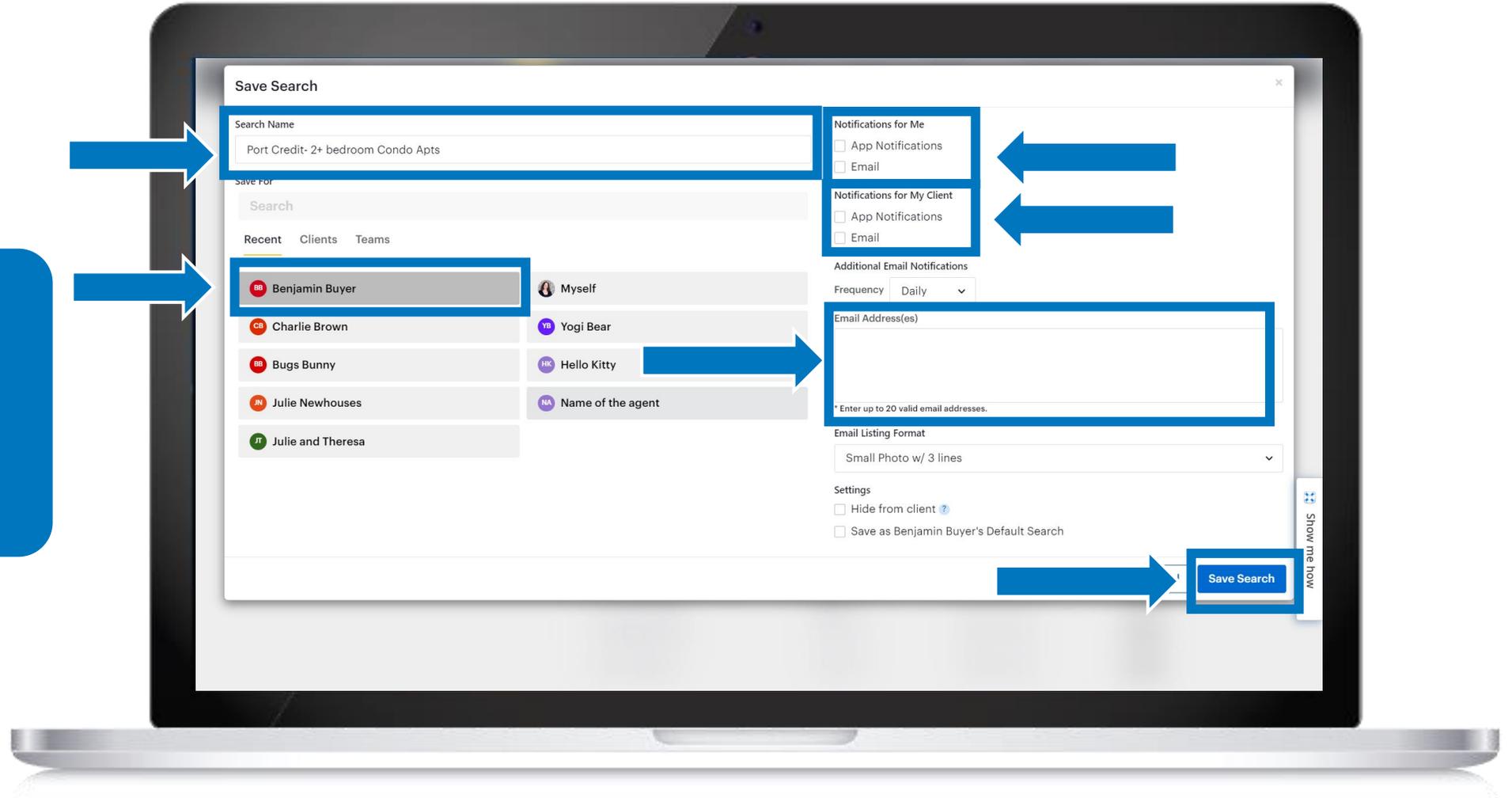
Import your Stratus Searches into REALM™


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

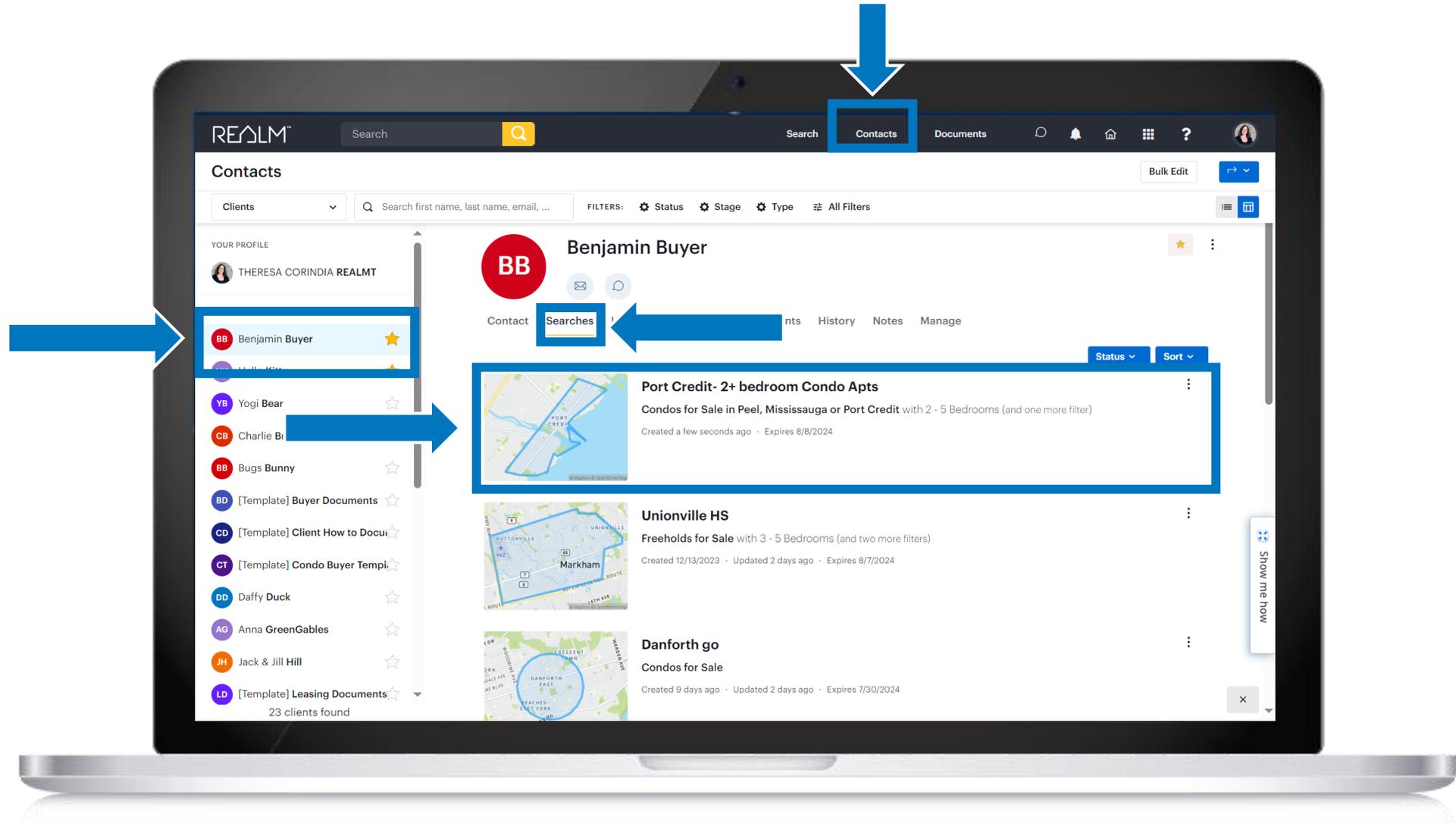


Import your Stratus Searches into REALM™


You can save an individual search for a contact!

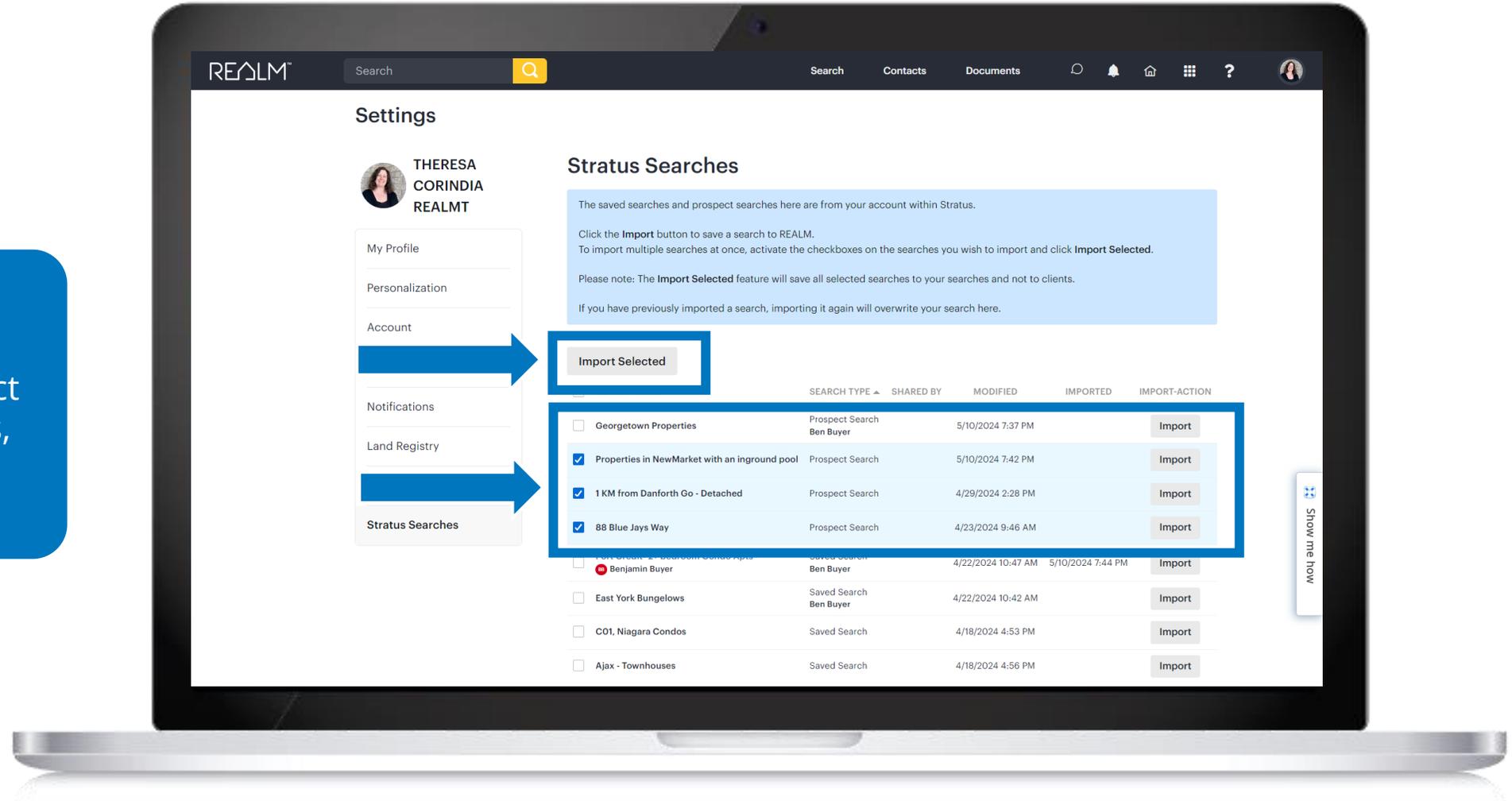


Searches saved for your contact will be added to their Searches



Import your Stratus Searches into REALM™

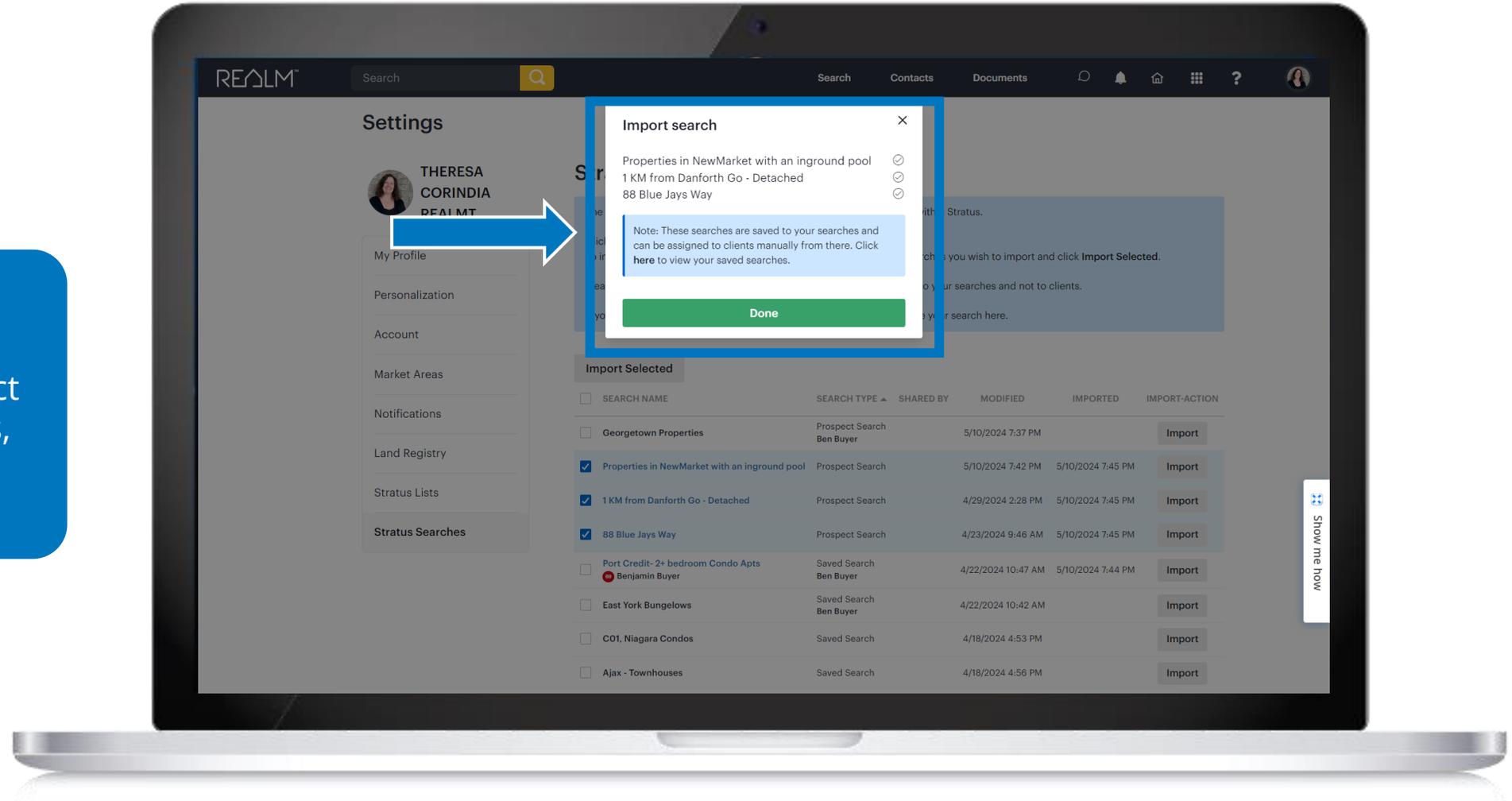

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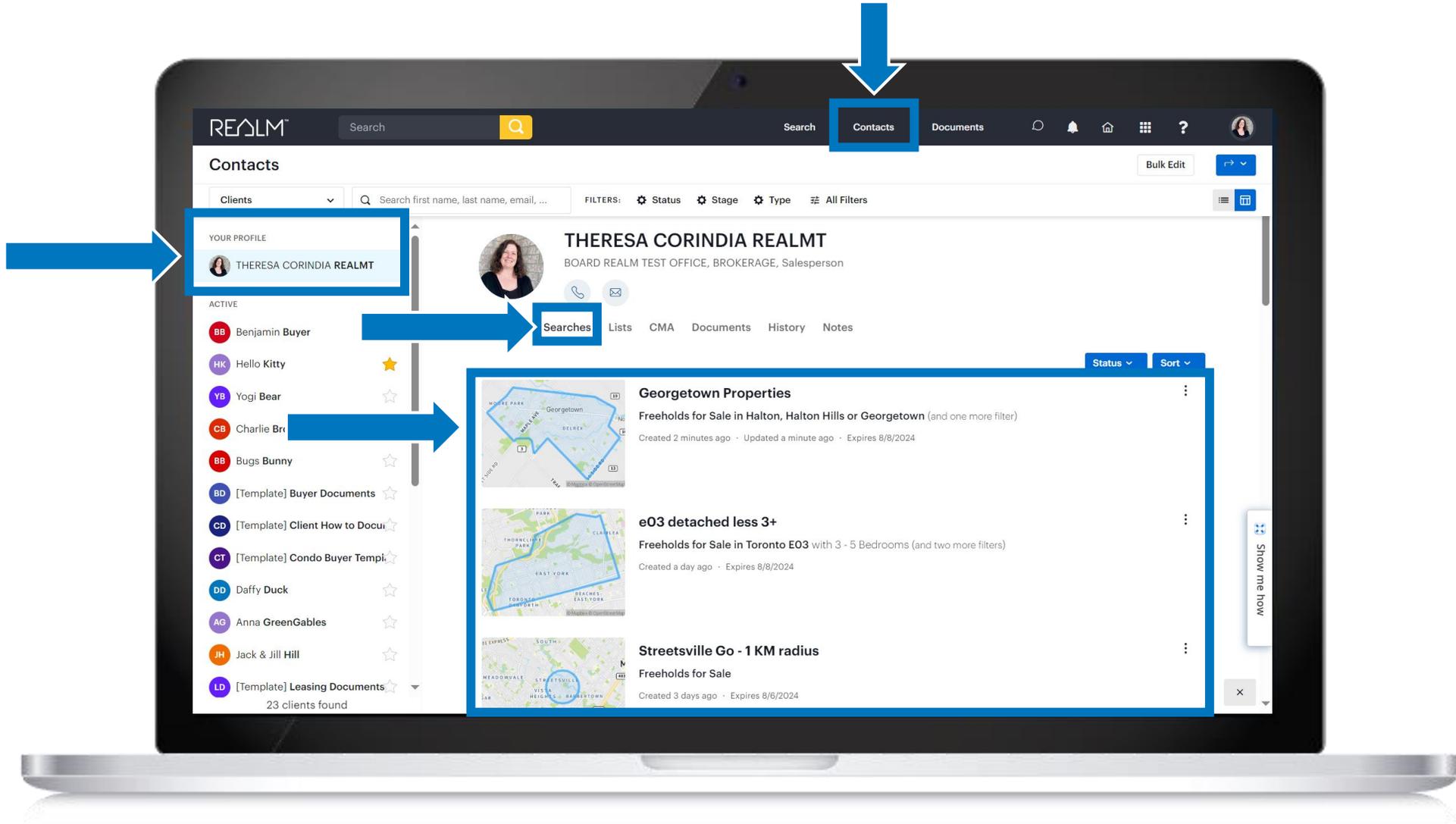
Import your Stratus Searches into REALM™



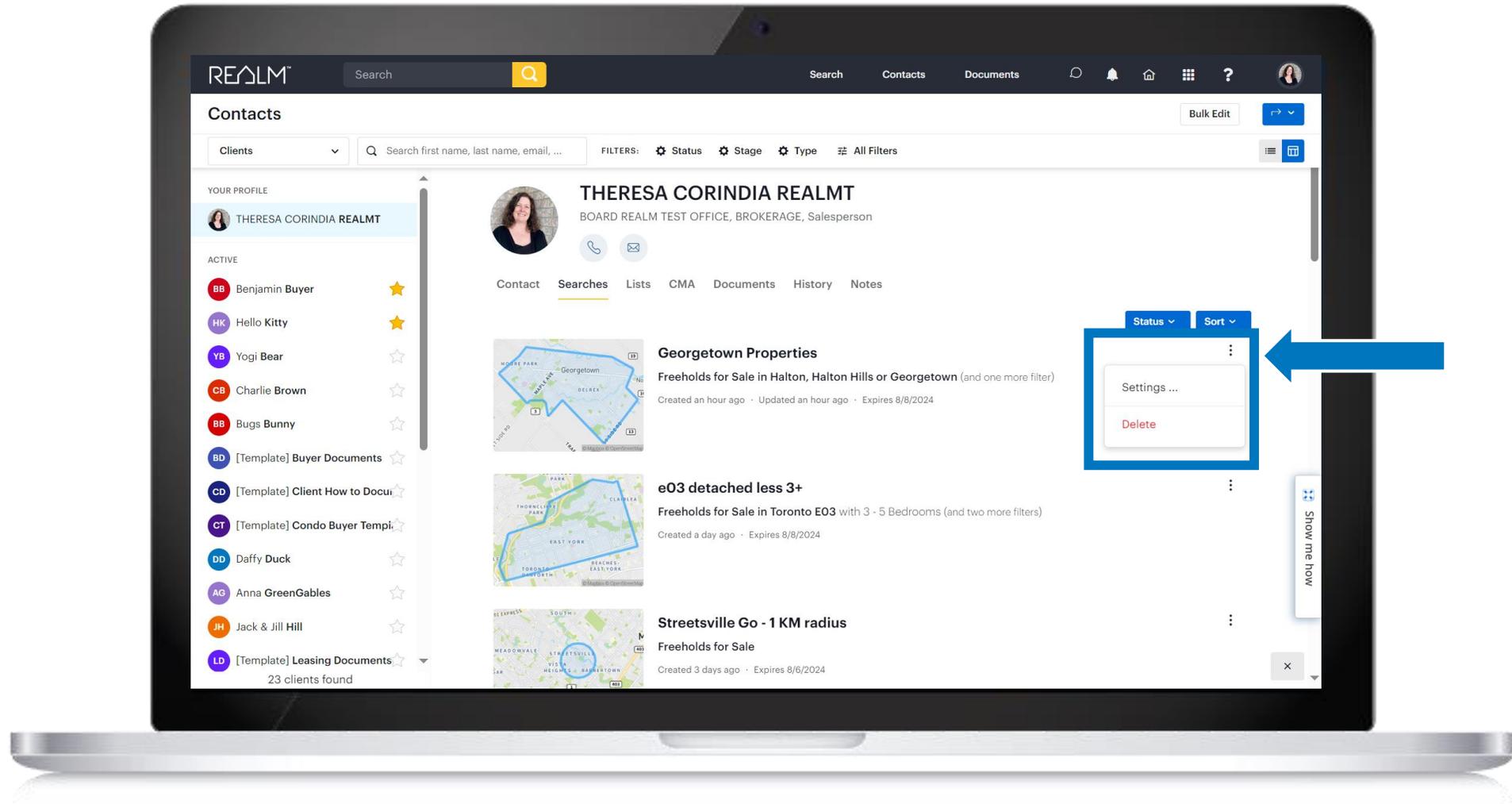
To import individual prospect or saved searches, click **Import**.



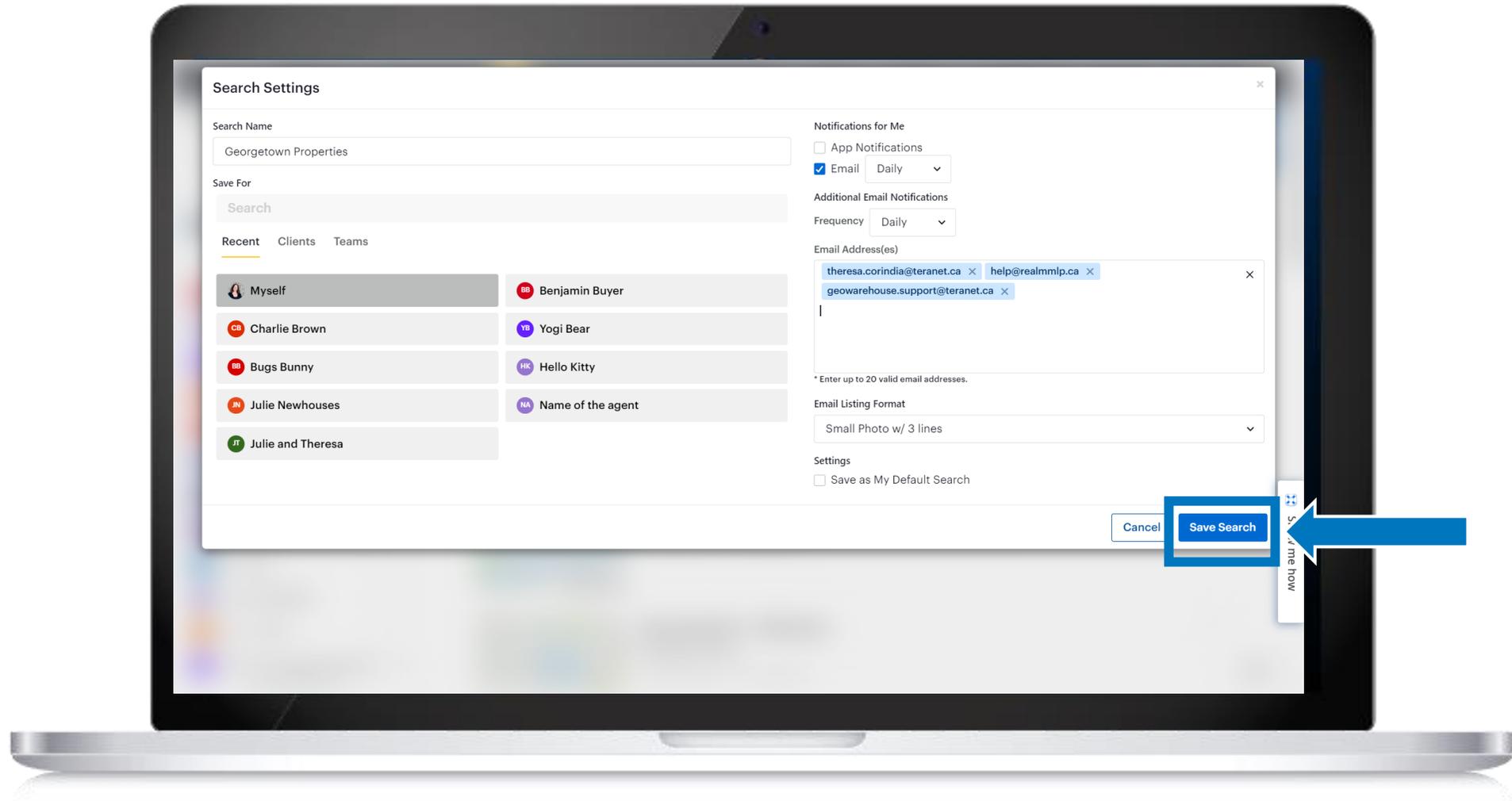
All searches will be added to your Searches



You can adjust notifications for a search



You can adjust notifications for a search



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.
- 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 minutes to answer any questions about getting started!



REALM™