Welcome to agent training for relay®. Today we will cover many things, but we don't expect you to remember every detail. Our goal today is to show you some of the things you can do with your relay® account. Please take notes and ask questions during the training to make it a better experience for you and your colleagues.

Feel free to use all or some of these tools as you become more familiar with relay® and learn all of the different ways relay® will help you connect to current clients and attract new buyers and sellers!

Today we're going to cover how start using relay® to help you get…

-Organized

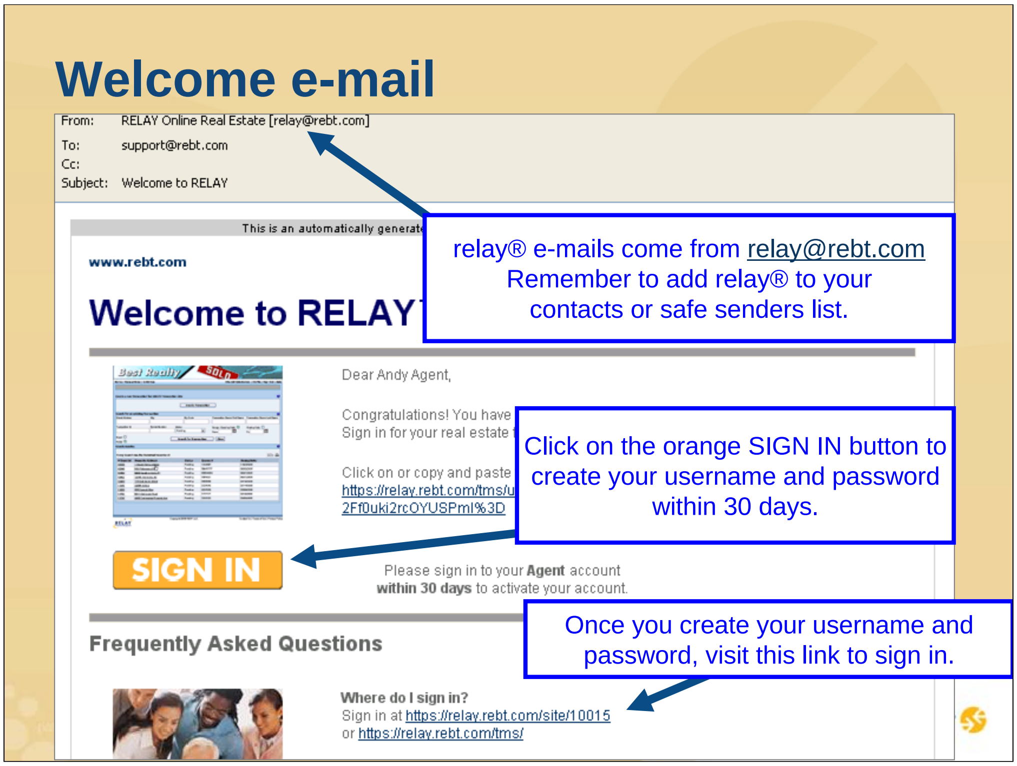
-Online

-Out of the office

With a few online tools, you can go to paperless transactions, but there are a lot of factors involved in your transactions, so let's take it one step at a time. We're going to start today by looking how you can have **less paper**, **fewer** photocopies, and **fewer** faxes in your transactions today!

Your new real estate file is organized, professional, and online. It means taking the pile of paperwork you work with every day, and moving it online, where you can securely reach it 24/7.

Just as any other new filing system, there is an adjustment period as we grow accustomed to a new process. Today we will take a look at some of the steps you can take to improve that period.



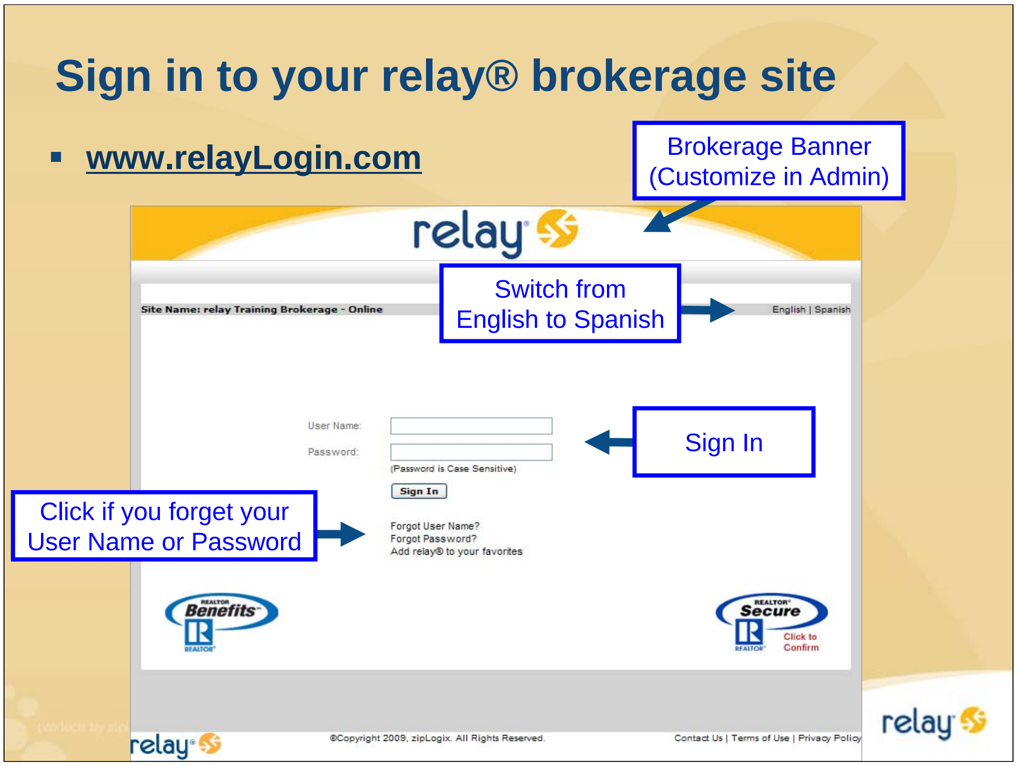
Every relay® user creates their own username and password to sign in to relay®. This helps keep your transaction information secure.

To create your own username and password, just click on the orange SIGN IN button to create your username and password the first time. After you have a username and password, remember to use the www.RELAYLogin.com link with your site ID number!

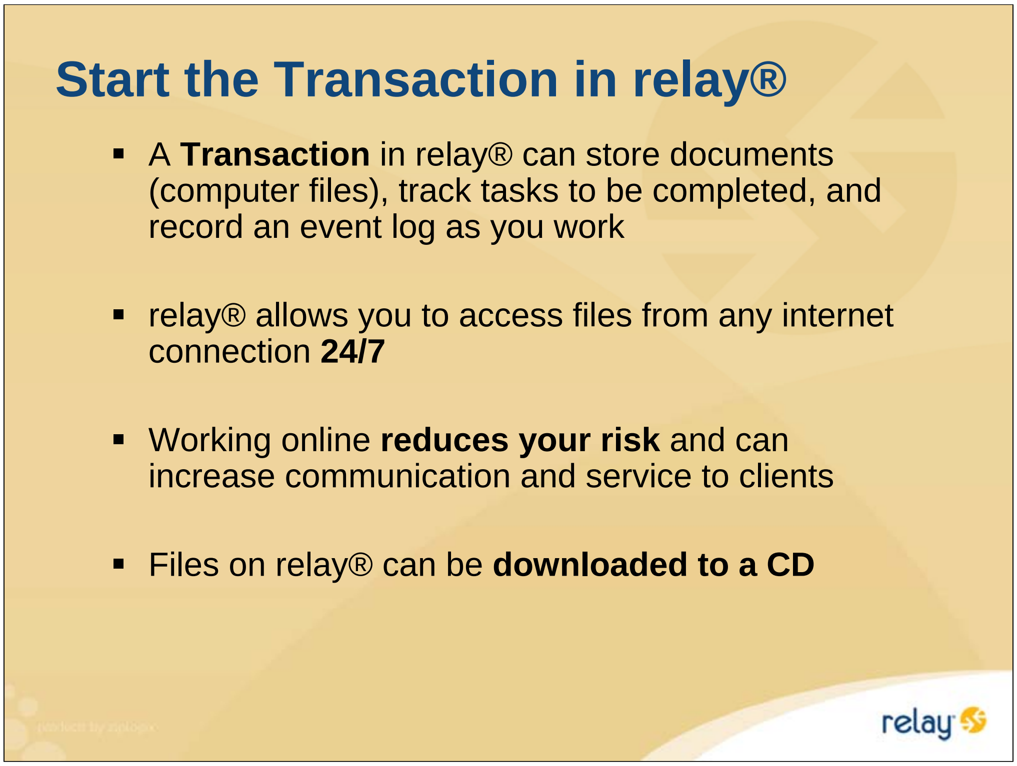
A site ID number is a five-digit number which identifies your online office, the same way that the street number on your address helps to identify your brokerage building.

Remember, you have 30 days to SIGN IN, or this temporary account expires, and you will need to have your password reset.

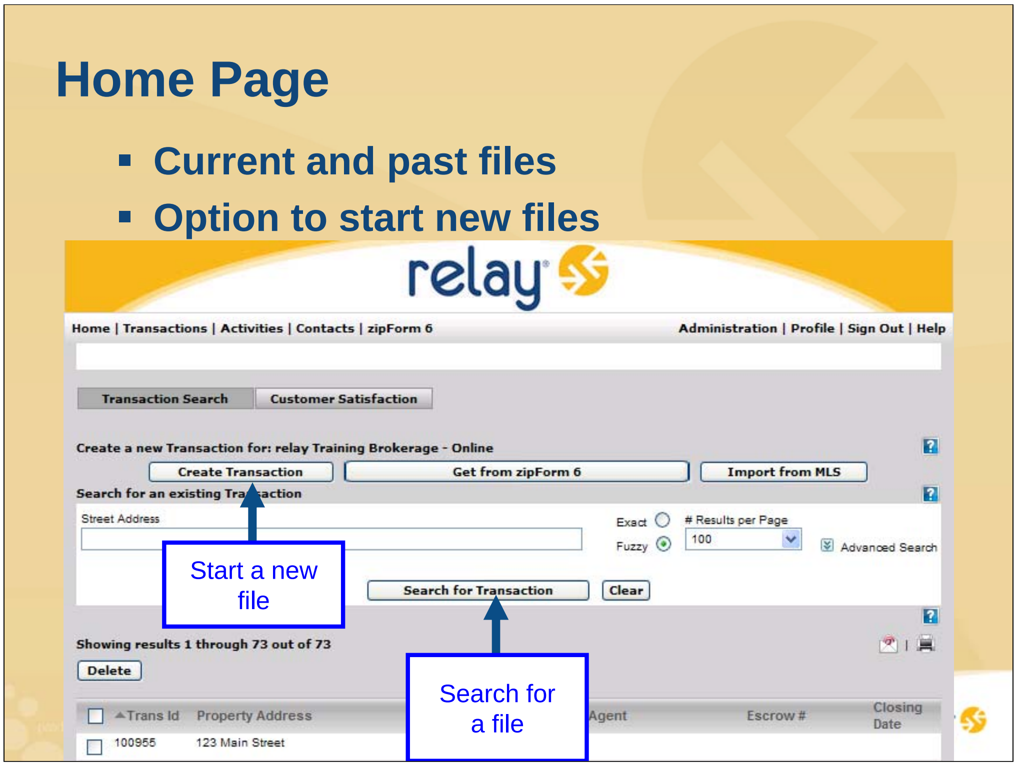
TIP: Not sure what your site ID number is? Scroll down on your e-mail to check the Frequently Asked Questions section.



Your relay® brokerage site allows you to use a username and password like a set of keys to access your files. It personalizes your appearance to your clients, and it allows you to sign in from any internet connection.



Just like your paper files, transaction files are labeled according to the property or the client. With today's training, we will see how to construct a file that will improve your business.



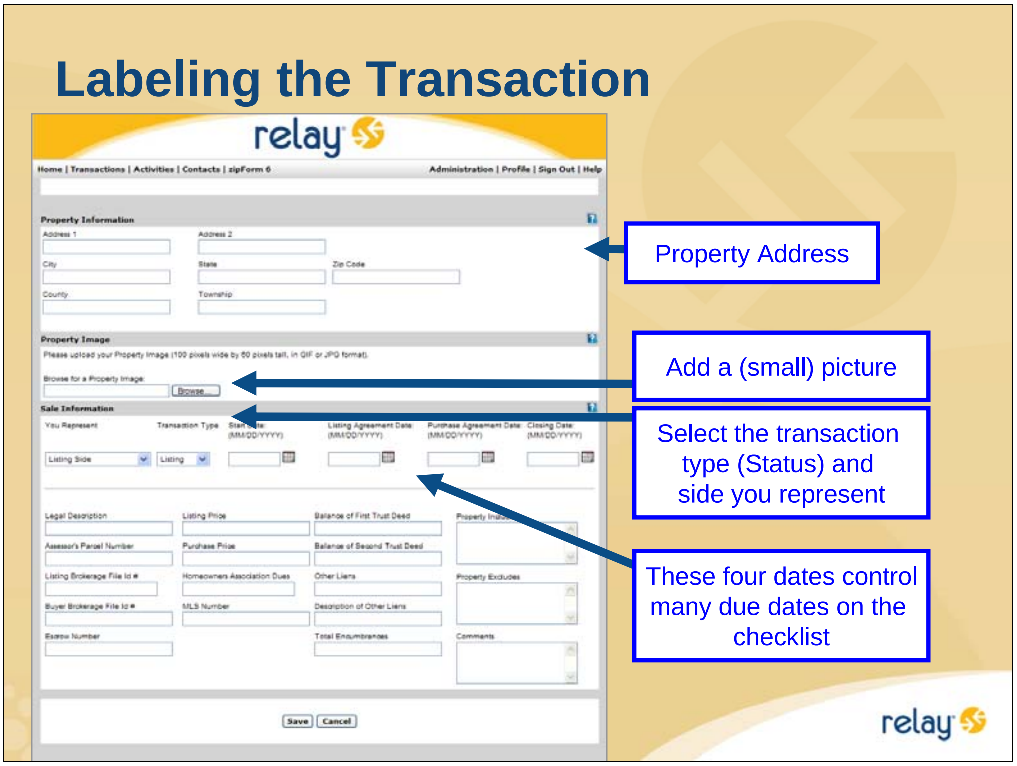
The Home | Transactions page is the first page you see when you sign in. It is one of the four primary navigation pages dealing with transactions.

The other three pages include:

Activities: where you can view, search, and update all of your transaction Activities

Contacts: your address book for all of your transactions. You can use Contacts in relay® to fill out Transaction Contacts, or you can use them in zipForm® 6 to fill out contact information in forms.

zipForm 6: This link is visible if you have updated your **relay® Manager** in zipForm® 6. It will take you directly to your forms (CA users note: It will take you directly to the C.A.R. sign in page if you are in California



The Cover Sheet serves as a label for the transaction, and provides an easy-to-access reference point for all files.

Fill in the property address (or leave it blank), add a property picture, and fill in property details.

It is important to select the appropriate side you are representing:

Listing Side: The Primary agent/team represents the seller

Buying Side: The Primary agent/team represents the buyer

Listing and Buying Side: A single primary agent/team represents both buyer and seller

Please note: when in an office, if different agents are representing different sides, select one side (for instance, the listing side), then you can easily add the other side (for instance, the buyer's agent) through the contacts later in the transaction.

The transaction type is important, and should be updated throughout the life of the transaction.

Listing: You have a listing contract

Purchase: You have an executed purchase agreement

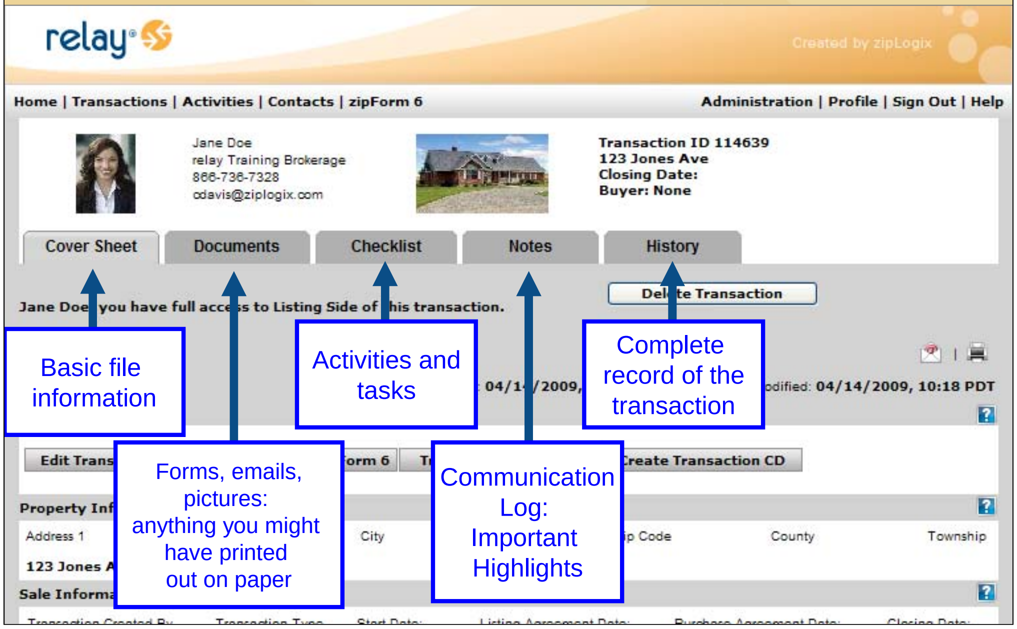
Prospect: A prospective buyer or seller

Inactive: A transaction which has fallen through

Closed: A transaction that has closed

Unknown: A file that has just been synchronized from zipForm® 6. Select a new Transaction Type to fully edit and use this file.

A Place for Everything



Once you create your file, you can begin storing information online and receiving instant updates on your files.

Uploading Documents

- A **document** is any item you would like to add to your online file for this property sale
- relay® accepts most types of **computer files** as documents
- Paper documents can be faxed in or scanned in using the **Fax Cover Sheet** or **Email to relay®**
- “Paperclip” files together by adding a **new version** of the document (through the Document Detail)

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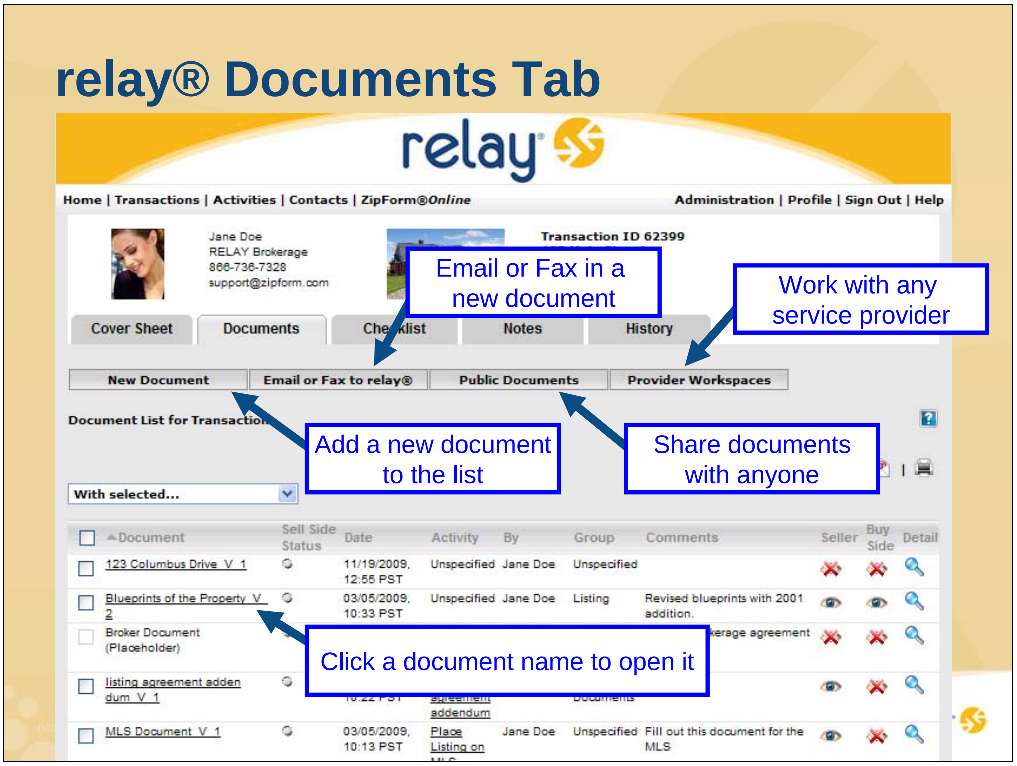
Documents form the core of the transaction. There are many ways to add these documents – uploading, email, fax - so that you can find the route that saves you the most time.



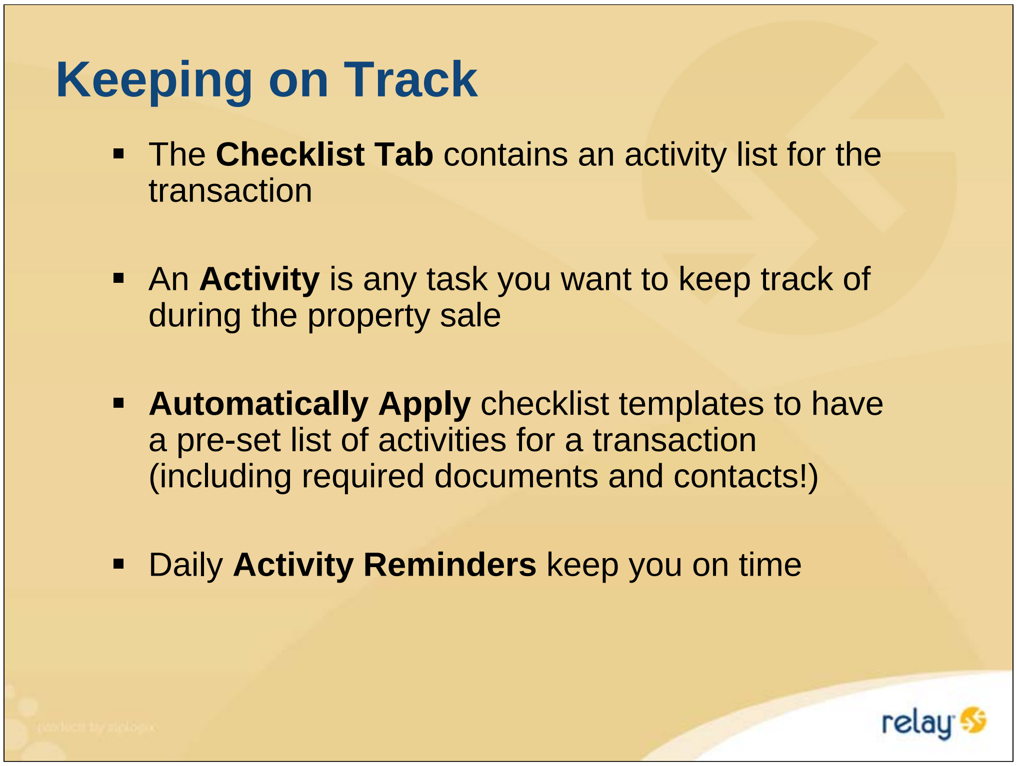
You can think of the Documents tab as a quick way of seeing your documents checklist.

Here you can see all of the documents that you have, and all of the ones you might need, so that you can plan accordingly.

Once documents are added to relay®, they can be shared, emailed, faxed, or viewed at any time, safely and securely.

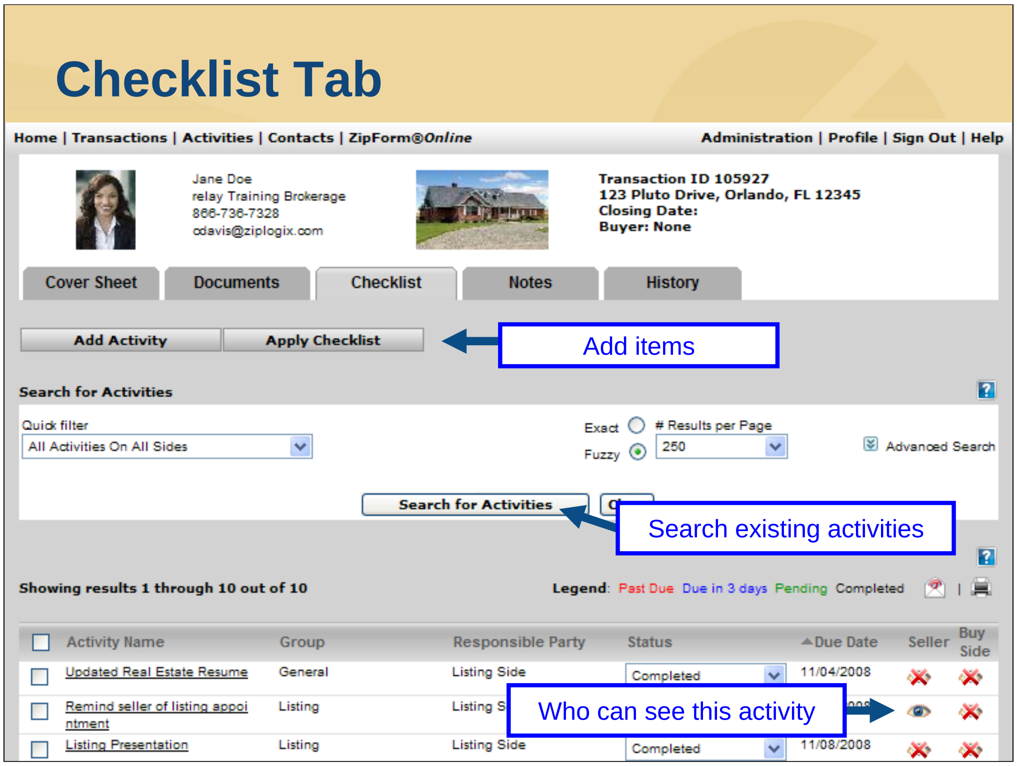
Click on the magnifying glass next to a document to view the document detail and add new versions of a document, create a fax cover sheet for the document, or track signatures.

The document detail magnifying glass will help keep your transaction organized and complete!



Your checklist keeps track of more than just document deadlines. It is the first place to go when you need to find out what needs to happen in a file.

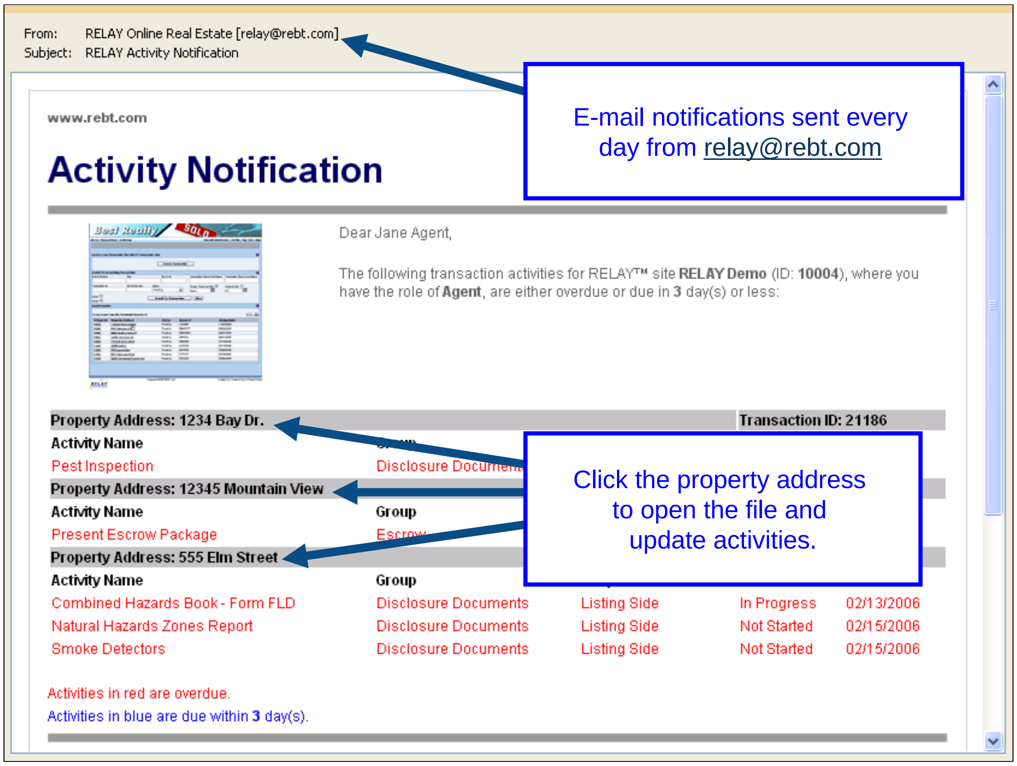
Use the checklist tab to keep track of all of your “To Do” items. It organizes everything you need to accomplish for this transaction in one easy-to-use, color-coded list.



You do not have to have a checklist to start a transaction, but it is helpful. You can use the checklist tab to add activities one by one, or to apply a checklist template which has many activities, documents, and contacts which you use on every transaction.

If you are using a checklist template, it is usually easier to start your transaction on the Checklist tab, rather than on the Documents tab, because your Checklist Template might have many of the documents you're about to add.

You can create your own checklist templates by using the main "Activities" link at the top left of your relay® screen and clicking on the "checklist templates" button. Please note that going to this link will take you out of this transaction.



Your automatic e-mails arrive every morning, with all of your activities for all of your transactions that are coming due, due, or past due that day.

Click on the property address to open the file and update activities.

TIP: If your e-mails from relay® are hard to find, or are going to your spam filter, add “relay@rebt.com” to your contacts list to make sure the e-mails always get through!

Communicating with Clients

- Reduce your risk with a complete communication log on the **Notes Tab**
- Share notes with clients, and allow them to respond
- relay® keeps track of everything with an automatic **History**
- And of course, share elements of the file throughout using **visibility**

relay

Client communication is the number one source of client satisfaction.

At the same time, keeping a communication log is the number one thing you can do to reduce your risk in a transaction file.

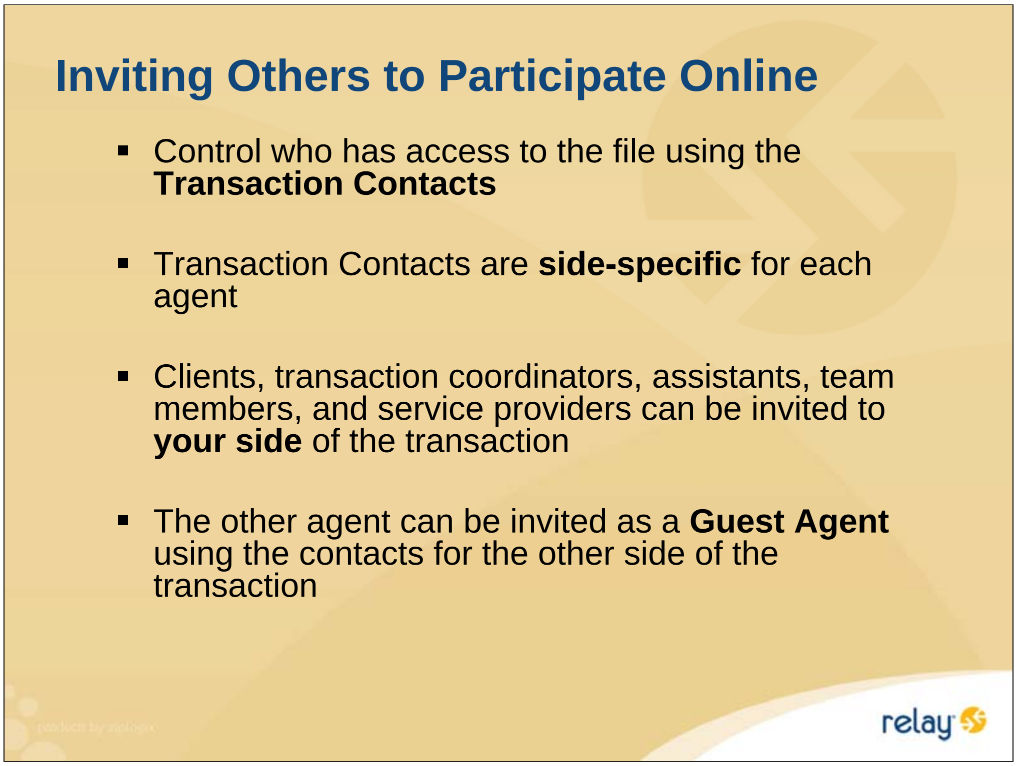
This is why relay® gives you many ways to increase your communication and outreach to your client, from sharing documents and notes online, to keeping an automatic history of all events.

Add a note

Notes can fit anything you need them to. Whether it’s a note to welcome your client to relay® and remind him/her that they can always contact you at any time, or the subjects discussed on a conference call, notes can keep track of all those other bits of information which you need to have in your transaction.

Remember! As part of your risk protection, notes cannot be edited or deleted once they are added to relay®, but you can make them “invisible” to your client if there is a typo. Confirm your notes before adding them to RELAY!

TIP: Type your notes in Word first to make sure that the spelling, grammar, and punctuation is correct!



You are always in control of who can or cannot see the file, and which elements of the file they can or cannot see (using visibility).

Remember to invite your team and clients to your side of the transaction, and to invite the other agent to their side of the transaction. This will preserve the agency relationship and visibility settings you have selected.

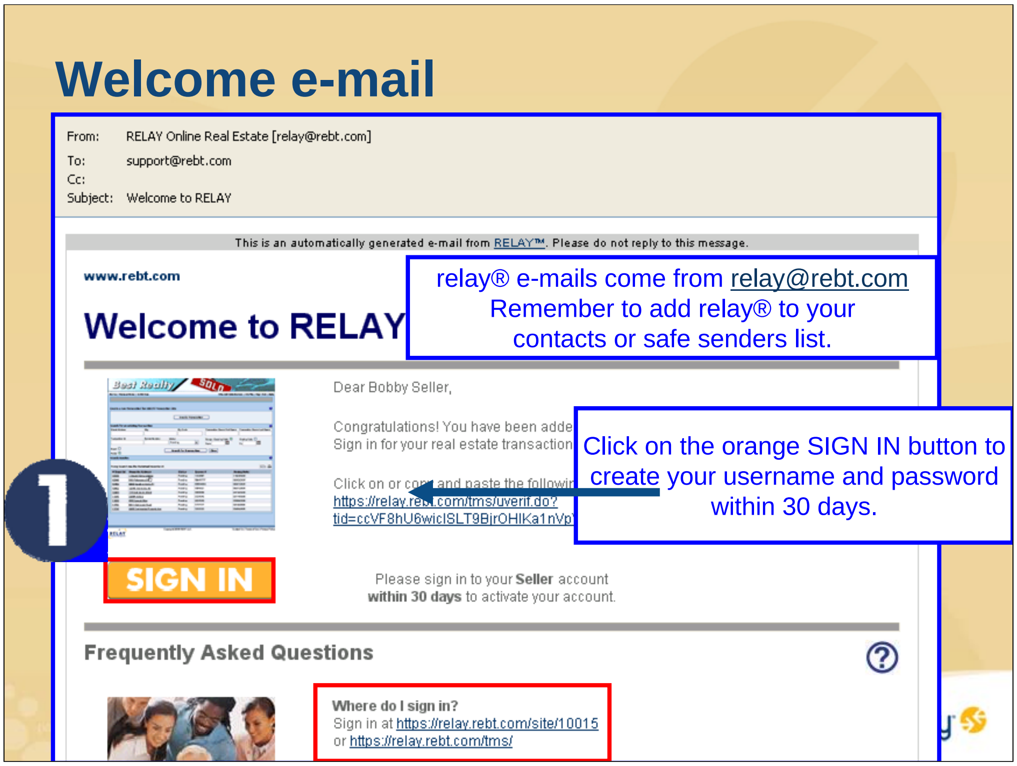
You should see two sets of contacts, unless the transaction is marked as a “Listing”. You will need to update the transaction status on the cover sheet in order to add the Buyer’s agent. We will talk about how to update transaction status in the next step.

Track contact information and control access to your file through Transaction Contacts.

You can create an account on this page for your client and for the agent on the other side (as a guest agent). Click “Add Seller” or “Add Buyer” to add the client under your contacts, or select “Add Agent” on the other side of the transaction in order to create a Guest Account for the other side. Remember to check the “Create Account” or “Create Guest Account” box to give that user access.

You may also share transaction information with others using relay®. Delegates are people within your office (other agents or team members, assistants, and transaction coordinators) who are already using relay®. Their accounts are controlled by the Site Administrator under the User Manager. You can also seamlessly work with other agents using relay®, in one shared file.

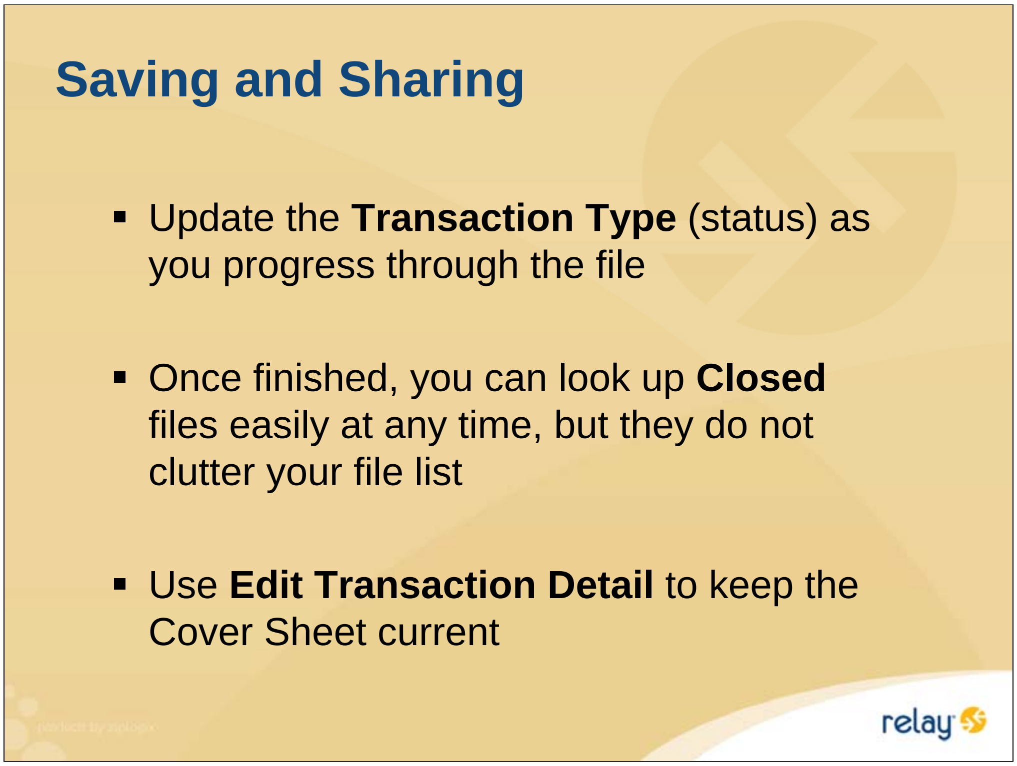
To add a service provider, click the Add Other button. Once added, you can invite them into a transaction through the Provider Workspace on the Documents tab.



Call or e-mail clients to let them know they should sign in to create their secure username and password.

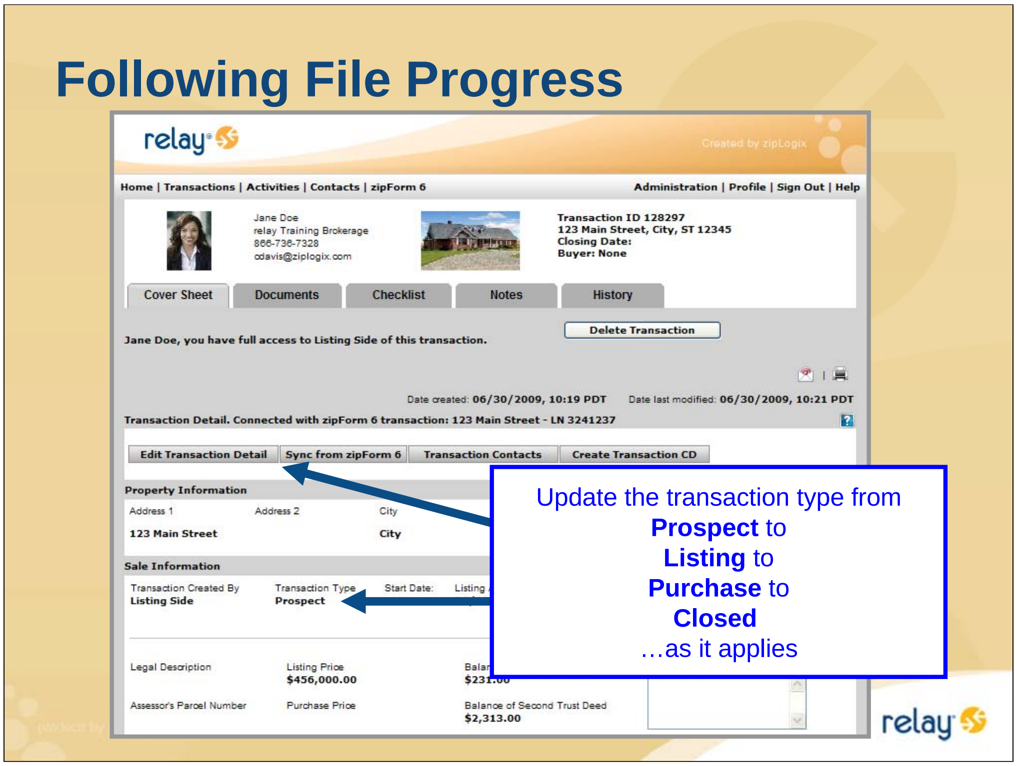
Once your client has created a secure username and password, he or she can always log in at your relay® site at: https://relay.rebt.com/site/_____ (fill in your five-digit site Id# at the end). Or link to your relay® site from your website! That is an easy, quick way to advertise the extra benefit you offer all of your clients with online real estate.

Remember, your client has 30 days to SIGN IN, or this temporary account expires, and you will need to reset the password in order to reset this account. After your client clicks the SIGN IN button, he or she creates their own Username and Password, which do not expire.



As you progress through the file, you can ensure your information is accurate by updating the Cover Sheet to follow the transaction progress.

Every time you reach a milestone with a new key signed contract (listing agreement, purchase agreement, closing), you should update the transaction cover sheet. This will ensure accurate due dates on your checklist, and it will also provide you with full access to the features which best suit your current file stage.



The transaction type affects your access to features of relay®. For instance, if you are in a listing, you will not see Buyer contacts, since the buyer is not present in a listing.

Thank you for joining us in our training today! We hope it was educational.

Here are some helpful links for contacting relay® or your trainer today.