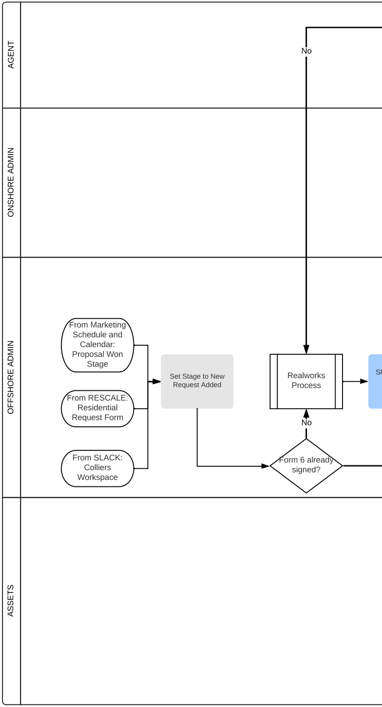
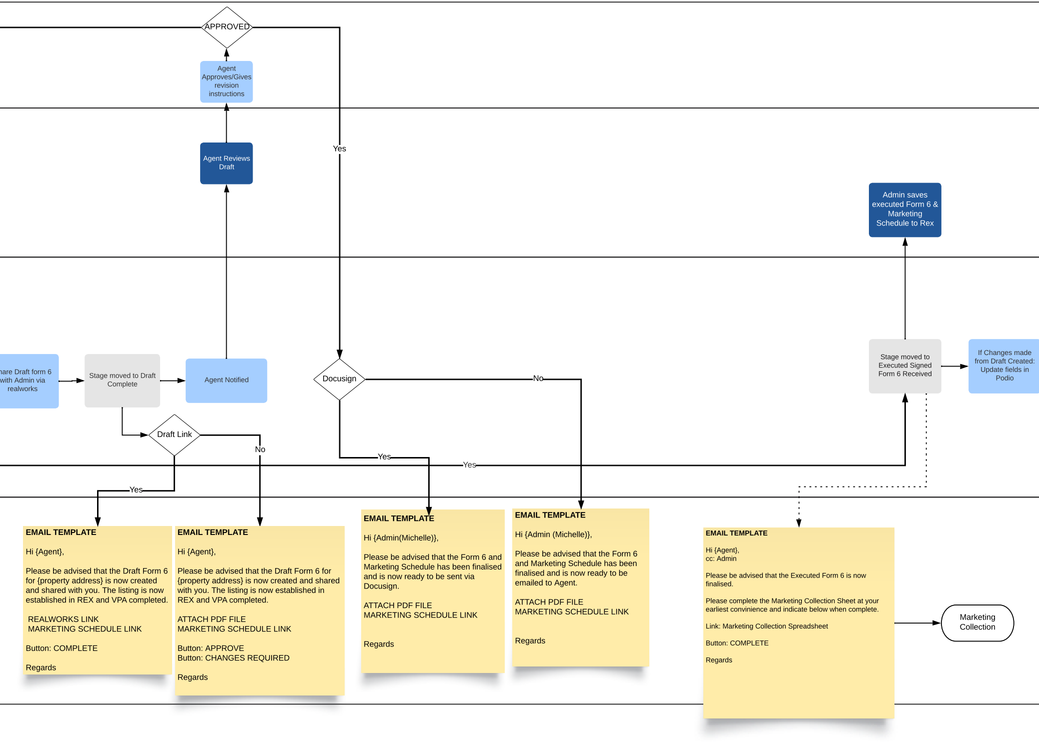

AGENT
ONSHORE ADMIN
OFFSHORE ADMIN
ASSETS
No
From Marketing Schedule and Calendar: Proposal Won Stage
From RESCALE: Residential Request Form
From SLACK: Colliers Workspace
Set Stage to New Request Added
Realworks Process
No
Form 6 already signed?

UPDATED PROCESS: Form 6 and Listing Process

Rescale Support | April 3, 2024


APPROVED
Agent Approves/Gives revision instructions
Yes
Agent Reviews Draft
Admin saves executed Form 6 & Marketing Schedule to Rex
hare Draft form 6 with Admin via realworks
Stage moved to Draft Complete
Agent Notified
Docusign
No
Stage moved to Executed Signed Form 6 Received
If Changes made from Draft Created: Update fields in Podio
Draft Link
No
Yes
Yes
Yes
Marketing Collection

EMAIL TEMPLATE

Hi {Agent},

Please be advised that the Draft Form 6 for {property address} is now created and shared with you. The listing is now established in REX and VPA completed.

REALWORKS LINK
MARKETING SCHEDULE LINK

Button: COMPLETE

Regards

EMAIL TEMPLATE

Hi {Agent},

Please be advised that the Draft Form 6 for {property address} is now created and shared with you. The listing is now established in REX and VPA completed.

ATTACH PDF FILE
MARKETING SCHEDULE LINK

Button: APPROVE
Button: CHANGES REQUIRED

Regards

EMAIL TEMPLATE

Hi {Admin(Michelle)},

Please be advised that the Form 6 and Marketing Schedule has been finalised and is now ready to be sent via Docusign.

ATTACH PDF FILE
MARKETING SCHEDULE LINK

Regards

EMAIL TEMPLATE

Hi {Admin (Michelle)},

Please be advised that the Form 6 and Marketing Schedule has been finalised and is now ready to be emailed to Agent.

ATTACH PDF FILE
MARKETING SCHEDULE LINK

Regards

EMAIL TEMPLATE

Hi {Agent},
cc: Admin

Please be advised that the Executed Form 6 is now finalised.

Please complete the Marketing Collection Sheet at your earliest convinience and indicate below when complete.

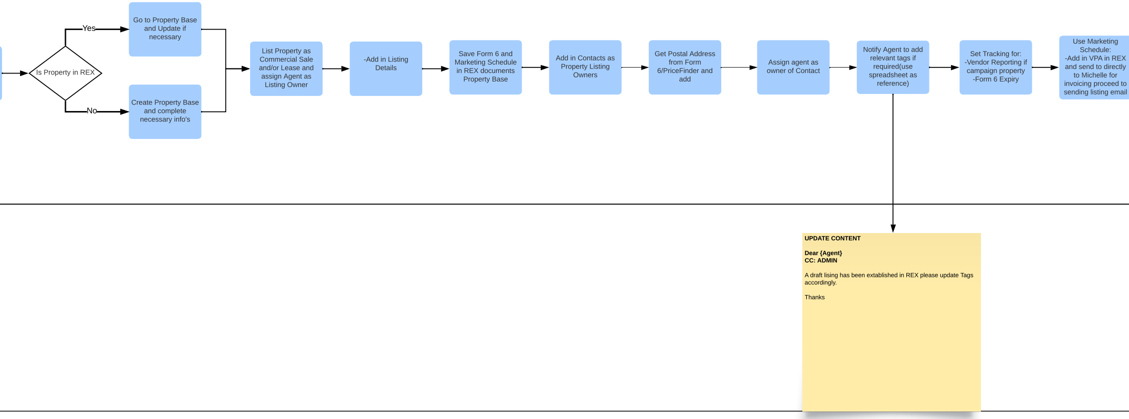
Link: Marketing Collection Spreadsheet

Button: COMPLETE

Regards

UPDATED PROCESS: Form 6 and Listing Process

Rescale Support | April 3, 2024


Is Property in REX
Yes
No
Go to Property Base and Update if necessary
Create Property Base and complete necessary info's
List Property as Commercial Sale and/or Lease and assign Agent as Listing Owner
-Add in Listing Details
Save Form 6 and Marketing Schedule in REX documents Property Base
Add in Contacts as Property Listing Owners
Get Postal Address from Form 6/PriceFinder and add
Assign agent as owner of Contact
Notify Agent to add relevant tags if required(use spreadsheet as reference)
Set Tracking for: -Vendor Reporting if campaign property -Form 6 Expiry
Use Marketing Schedule: -Add in VPA in REX and send to directly to Michelle for invoicing proceed to sending listing email

UPDATE CONTENT

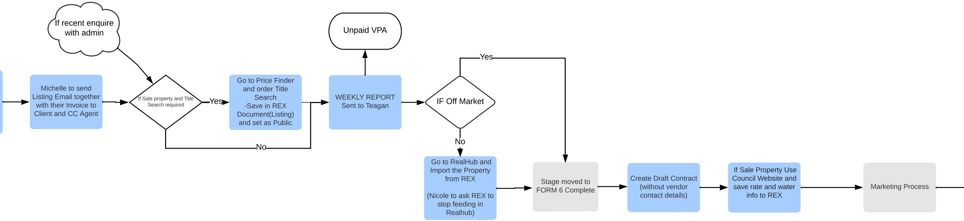
Dear {Agent}
CC: ADMIN

A draft lising has been extablished in REX please update Tags accordingly.

Thanks

UPDATED PROCESS: Form 6 and Listing

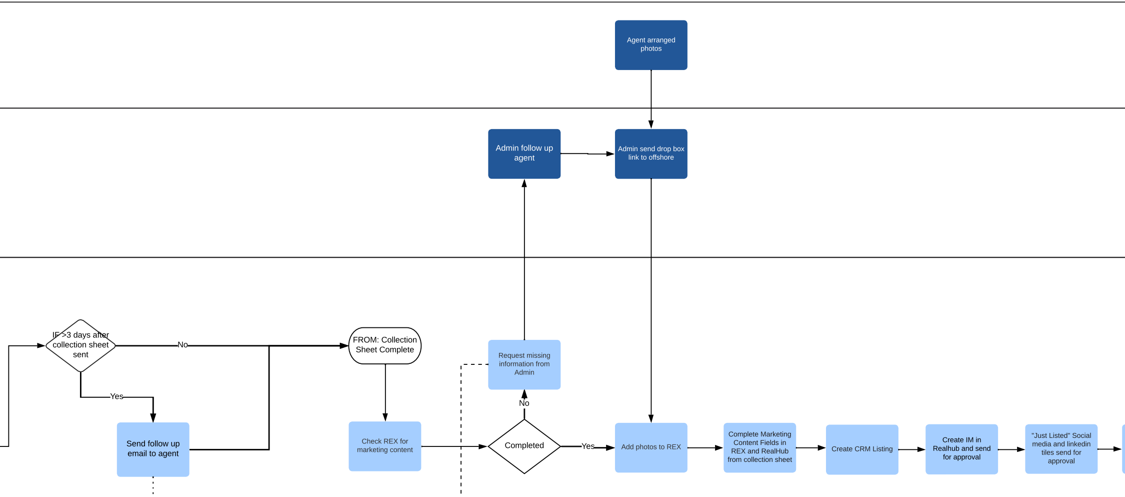
Rescale Support | April 3, 2024


If recent enquire with admin
Michelle to send Listing Email together with their Invoice to Client and CC Agent
If Sale property and Title Search required
Yes
No
Go to Price Finder and order Title Search
-Save in REX Document(Listing) and set as Public
Unpaid VPA
WEEKLY REPORT Sent to Teagan
IF Off Market
Yes
No
Go to RealHub and Import the Property from REX
(Nicole to ask REX to stop feeding in Realhub)
Stage moved to FORM 6 Complete
Create Draft Contract (without vendor contact details)
If Sale Property Use Council Website and save rate and water info to REX
Marketing Process

Process

UPDATED PROCESS: Form 6 and Listing

Rescale Support | April 3, 2024


Agent arranged photos
Admin follow up agent
Admin send drop box link to offshore
IF >3 days after collection sheet sent
No
Yes
Send follow up email to agent
FROM: Collection Sheet Complete
Check REX for marketing content
Request missing information from Admin
No
Completed
Yes
Add photos to REX
Complete Marketing Content Fields in REX and RealHub from collection sheet
Create CRM Listing
Create IM in Realhub and send for approval
"Just Listed" Social media and linkedin tiles send for approval

AUTO EMAIL TEMPLATE

Hi {Agent},

This is a reminder to please complete the Marketing Collection Sheet.

Thanks so much!

Regards

Email Template

Hi Admin,

We are missing information required for the marketing of {property}

OR

There is custom marketing required for this property.

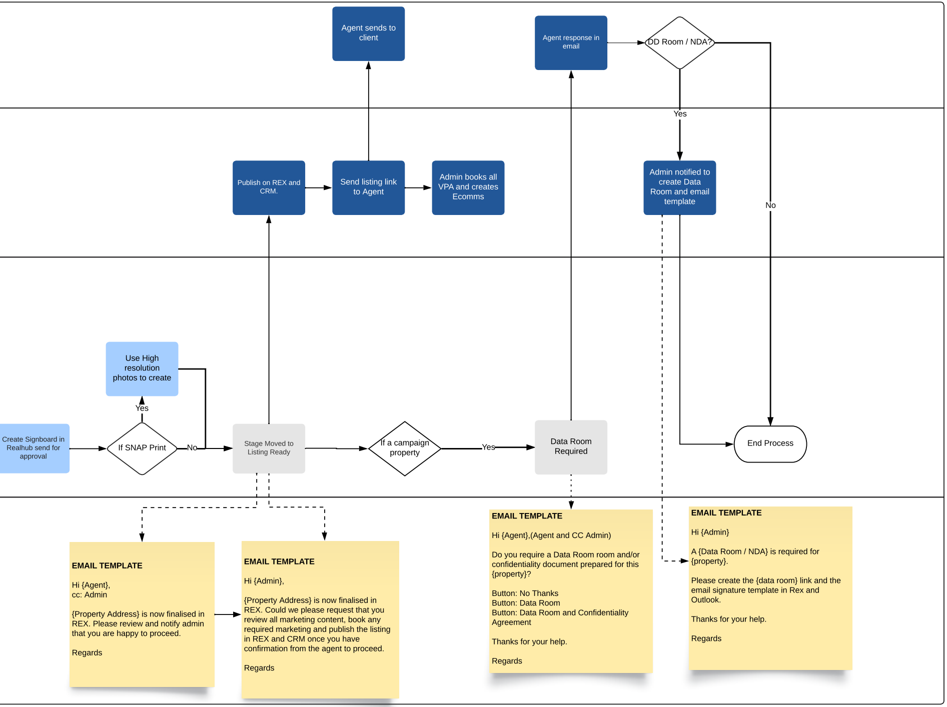
Can you please review the marketing collection and liase with the agent to complte.

Please let us know when complete

Process

UPDATED PROCESS: Form 6 and Listing Process

Rescale Support | April 3, 2024


Agent sends to client
Agent response in email
DD Room / NDA?
Yes
No
Publish on REX and CRM.
Send listing link to Agent
Admin books all VPA and creates Ecomms
Admin notified to create Data Room and email template
Use High resolution photos to create
Yes
Create Signboard in Realhub send for approval
If SNAP Print
No
Stage Moved to Listing Ready
If a campaign property
Yes
Data Room Required
End Process

EMAIL TEMPLATE

Hi {Agent},
cc: Admin

{Property Address} is now finalised in REX. Please review and notify admin that you are happy to proceed.

Regards

EMAIL TEMPLATE

Hi {Admin},

{Property Address} is now finalised in REX. Could we please request that you review all marketing content, book any required marketing and publish the listing in REX and CRM once you have confirmation from the agent to proceed.

Regards

EMAIL TEMPLATE

Hi {Agent},(Agent and CC Admin)

Do you require a Data Room room and/or confidentiality document prepared for this {property}?

Button: No Thanks
Button: Data Room
Button: Data Room and Confidentiality Agreement

Thanks for your help.

Regards

EMAIL TEMPLATE

Hi {Admin}

A {Data Room / NDA} is required for {property}.

Please create the {data room} link and the email signature template in Rex and Outlook.

Thanks for your help.

Regards