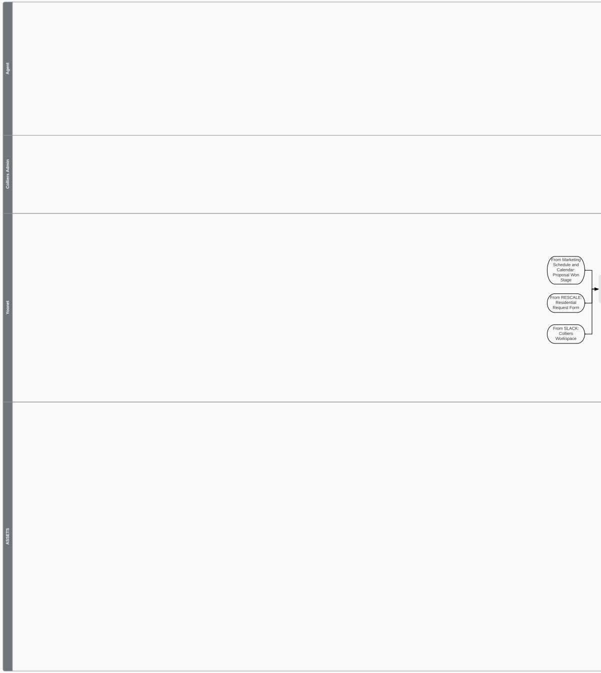
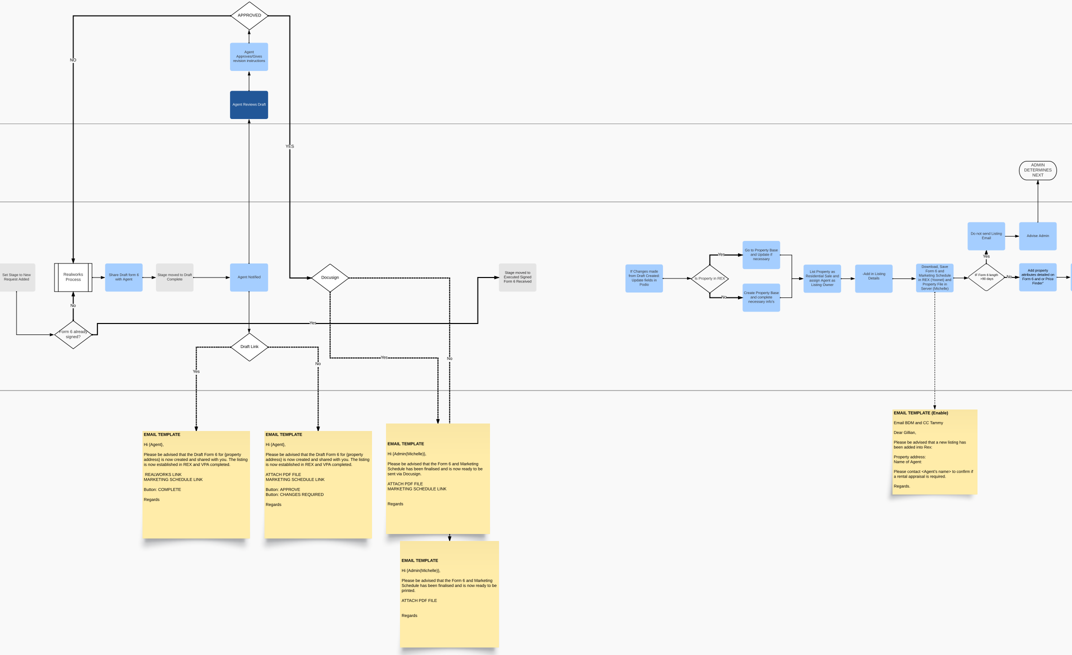

Agent
Colliers Admin
Yoonet
ASSETS
From Marketing Schedule and Calendar: Proposal Won Stage
From RESCALE: Residential Request Form
From SLACK: Colliers Workspace


APPROVED
NO
YES
Agent Approves/Gives revision instructions
Agent Reviews Draft
ADMIN DETERMINES NEXT
Set Stage to New Request Added
Realworks Process
Share Draft form 6 with Agent
Stage moved to Draft Complete
Agent Notified
Docusign
Stage moved to Executed Signed Form 6 Received
No
Form 6 already signed?
Yes
Draft Link
Yes
No
Yes
No
If Changes made from Draft Created: Update fields in Podio
Is Property in REX
Yes
Go to Property Base and Update if necessary
No
Create Property Base and complete necessary info's
List Property as Residential Sale and assign Agent as Listing Owner
-Add in Listing Details
Download, Save Form 6 and Marketing Schedule in REX (Yoonet) and Property File in Server (Michelle)
IF Form 6 length >90 days
Yes
Do not send Listing Email
Advise Admin
No
Add property attributes detailed on Form 6 and or Price Finder*

**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 printed.

ATTACH PDF FILE

Regards

**EMAIL TEMPLATE (Enable)**

Email BDM and CC Tammy

Dear Gillian,

Please be advised that a new listing has been added into Rex:

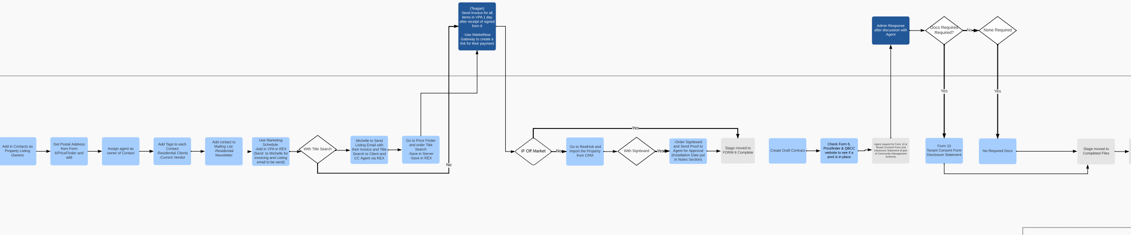
Property address:
Name of Agent:

Please contact <Agent's name> to confirm if a rental appraisal is required.

Regards.

# PROCESS: Residential Form 6 and Listing Process

Rescale Support | August 29, 2023


Add in Contacts as Property Listing Owners
Get Postal Address from Form 6/PriceFinder and add
Assign agent as owner of Contact
Add Tags to each Contact -Residential Clients -Current Vendor
Add contact to Mailing List: -Residential Newsletter
Use Marketing Schedule: -Add in VPA in REX (Send to Michelle for invoicing and Listing email to be send)
With Title Search
No
Michelle to Send Listing Email with their Invoice and Title Search to Client and CC Agent via REX
Go to Price Finder and order Title Search -Save in Server -Save in REX
(Teagan) Send Invoice for all items in VPA 1 day after receipt of signed form 6
-Use MarketNow Gateway to create a link for their payment
IF Off Market
Yes
No
Go to RealHub and Import the Property from CRM
With Signboard
Yes
-Order Signboard and Send Proof to Agent for Approval (Installation Date put in Notes Section)
Stage moved to FORM 6 Complete
Create Draft Contract
Check Form 6, Pricefinder & QBCC website to see if a pool is in place
Agent request for Form 10 & Tenant Consent Form and Disclosure Statement (if part of Community Management Scheme)
Admin Response after discussion with Agent
Docs Required Required?
No
None Required
Yes
Yes
Form 10 Tenant Consent Form Disclosure Statement
No Required Docs
Stage moved to Completed Files

**EMAIL TEMPLATE**
CC: Admin
Hi {Agent},

{Property Address} is now finalised in REX. Could we please request that you gather the necessary marketing content to complete this listing.

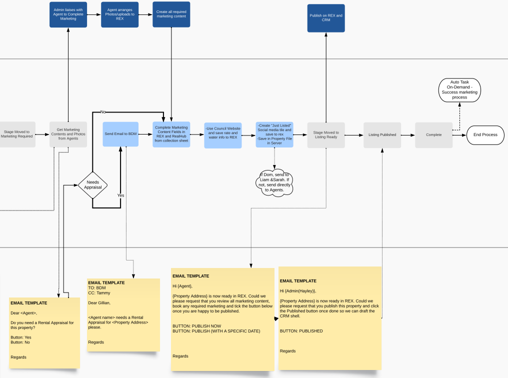
LINK: Link to Marketing Collection Sheet

Please let us know when you are happy with all content for this listing by clicking the button below and we'll create the Brochure and Social Media Tiles once we received your response and copy of Files.

Please give a dropbox link for the photos via return email. Thank you.

Button: Complete
Button: Ready for Publishing Now
Button: Ready for Publishing Specific Date

Regards


Admin liaises with Agent to Complete Marketing
Agent arranges Photos/uploads to REX
Create all required marketing content
Publish on REX and CRM
Auto Task On-Demand - Success marketing process
Stage Moved to Marketing Required
Get Marketing Contents and Photos from Agents
Send Email to BDM
Complete Marketing Content Fields in REX and RealHub from collection sheet
-Use Council Website and save rate and water info to REX
-Create "Just Listed" Social media tile and save to rex
-Save in Property File in Server
Stage Moved to Listing Ready
Listing Published
Complete
End Process
No
Needs Appraisal
Yes
If Dom, send to Liam &Sarah. If not, send directly to Agents.

**EMAIL TEMPLATE**

Dear <Agent>,

Do you need a Rental Appraisal for this property?

Button: Yes
Button: No

Regards

**EMAIL TEMPLATE**
TO: BDM
CC: Tammy

Dear Gillian,

<Agent name> needs a Rental Appraisal for <Property Address> please.

Regards

**EMAIL TEMPLATE**

Hi {Agent},

{Property Address} is now ready in REX. Could we please request that you review all marketing content, book any required marketing and tick the button below once you are happy to be published.

BUTTON: PUBLISH NOW
BUTTON: PUBLISH (WITH A SPECIFIC DATE)

Regards

**EMAIL TEMPLATE**

Hi {Admin(Hayley)},

{Property Address} is now ready in REX. Could we please request that you publish this property and click the Published button once done so we can draft the CRM shell.

BUTTON: PUBLISHED

Regards