McGrath Sales Process

Training Manual

McGrath

The McGrath Sales Process

This is your Go-to guide on everything you need to know to be able to confidently work through our Sales Process here at McGrath.

This handbook outlines processes from Agent Appraisals through to Settlements.

One of the great things about McGrath Company-owned offices is the support system we have. There is help at every corner with whatever you may need.

Your Onboarding Consultant and your Front Office Managers are always here to help, if you are ever stuck or not sure what to do, please contact them and they will be happy to help.

Other Contacts:

For all marketing queries contact your Campaign Coordinator (CC)
For all Auction queries contact: auctions@mcgrath.com.au
For all Settlement queries please contact: SettlementsHQ@mcgrath.com.au or SettlementsNorth@mcgrath.com.au
For all Agentbox queries please contact: carolinafox@mcgrath.com.au
For all accounts queries contact: AREnquires@mcgrath.com.au
For all other queries please contact: help@mcgrath.com.au

McGrath

The McGrath Sales Process

Tour of Agentbox:

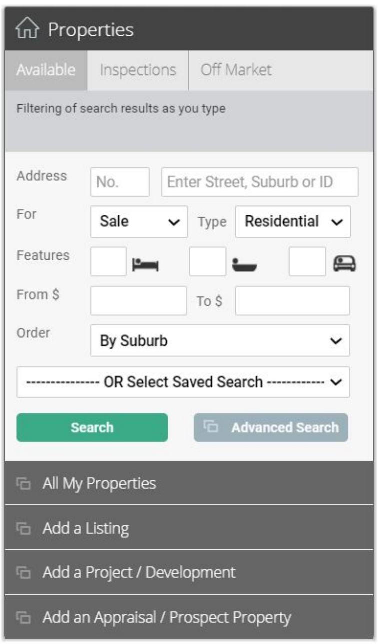
Layout & Navigation

See below the Agenbox overview and explanation of the main functions:

1. **Universal Search Bar**. Quickly search and access your listings, projects, contacts, properties (prospect records) and staff using a minimum 3 character search.

2. **Main Menu**. You can access the various sections of the database via the 'Main Menu'.

3. **Panels**. The system is made up of different panels e.g. each main menu item will open up with a matching 'Left-Panel'.



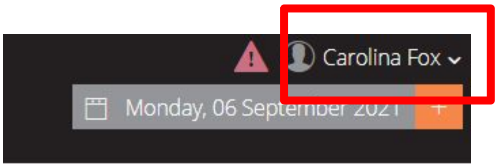
The McGrath Sales Process

Tour of Agentbox:

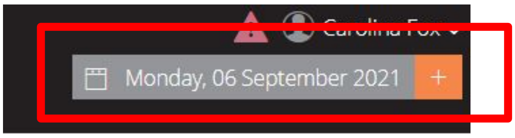
Layout & Navigation

See below the Agenbox overview and explanation of the main functions:

4. **Profile, Help and Support**. Click your name to access your profile, the Help Centre, purchase SMS credits, view portal feed logs and logout of the system.



5. **Today Panel & Quick Add**. Access your targets, calendar and quickly complete actions such as log an enquiry, note, add contact etc.



6. **Toggle**. Use the Toggle icon in the bottom left-hand corner of the system to quickly move between the two open records.

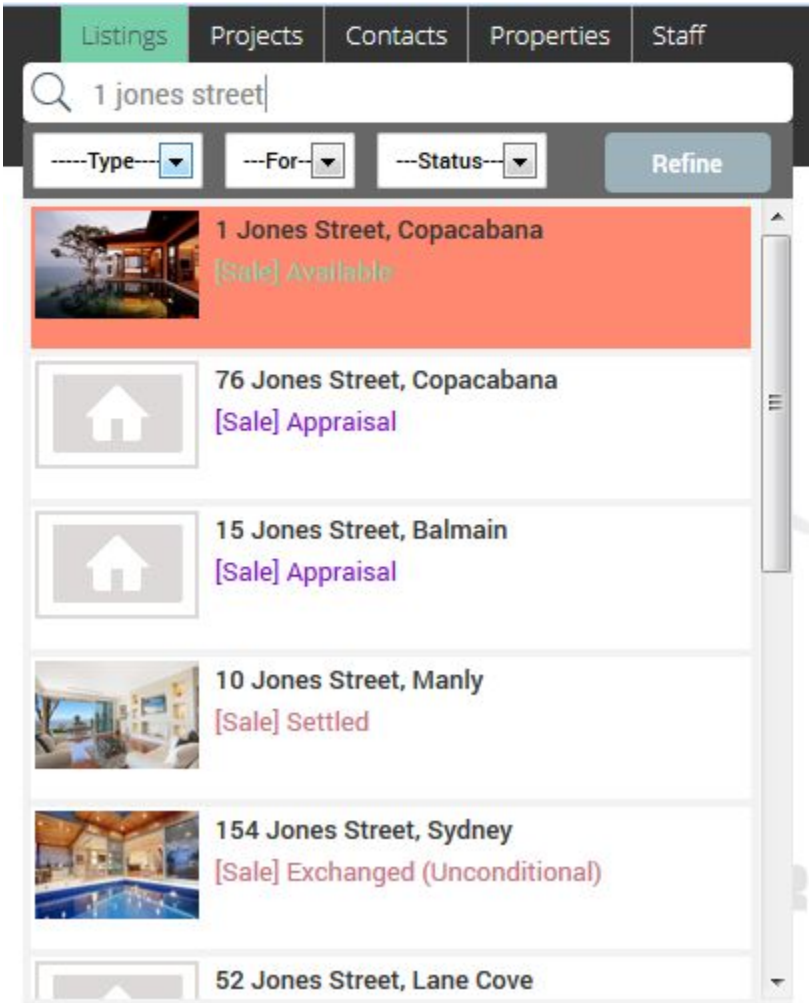
7. **Agentbox Help Centre**. The Agentbox Help Centre consolidates a range of useful training resources and courses, submit support tickets and change requests, in an easy to access friendly interface.

The McGrath Sales Process

Tour of Agentbox:

<u>The Universal Search Bar</u>

Quickly search and access your listings, projects, contacts, properties (prospect records) and staff using a minimum 3 character search.



McGrath

The McGrath Sales Process

The Main Menu

You can access the various sections of the database via the Main Menu, each menu item will open up a corresponding Left-Panel.

From left to right:

Dashboard

The Dashboard displays a users current pipeline, Targets, Reminders and Agentbox Announcements.

My Office

For Operations Team use only.

Properties

In Properties you can add/edit your listings, appraisals, prospects and create projects. Add OFI time, log enquiries and feedback from OFI's create inspection/vendor reports, create brochures, letters and e-newsletters, conduct advanced searches and print reports etc.

Contacts

In Contacts you can add/edit your contacts, run advanced searches to send bulk communications e.g weekly e-newsletters, mail merges or create reports, send emails e-newsletters and SMS direct to a contact, log property feedback from an inspection by appointment, update/edit their property requirements, create tasks and add notes, view their related properties and properties they have inspected etc.

The McGrath Sales Process

The Main Menu

Tasks

In Tasks you can view your current, upcoming, overdue and completed tasks. You can print a report, bulk complete, create a task, or apply an activity schedule. You can also add or edit an activity schedule template and much more.

Leads Capture

N/A

Website

N/A

Reports

In Reports you can generate stock-list and open home reports, pipeline reports, lease and sales reports, property, contact, performance reports etc.

Performance

In Performance Master users can view the office performance and individual agent performance in a snapshot. Regular users can view their own performance figures.

Prospector

The Agentbox and integrated RP Data prospecting tool allows you to set up core areas, add properties to your database with a single click, prospect to properties in your core area via your database and/or RP Data.

Note: This feature is only accessible if your accounthas been set up with the Agentbox Prospector module.

Sales Trust

N/A

McGrath

The McGrath Sales Process

Dashboard Overview

The **Agentbox Dashboard** displays a users current pipeline, Targets, Reminders and Agentbox Announcements.

1. Click on **Dashboard** from the main menu

2. From this panel users can view the following:

Current pipeline - a visual display of the total number of appraisals, presentations, listed (pending) available listings, conditional and unconditional sales which you can refine the pipeline by For Sale or For Rental. **Click here for further information**

Targets - a visual display of your targets and progress. Filter by day, month, financial year and calendar year. **Click here for further information**

Reminders - a visual display of your tasks, reminders and appointments. **Click here for further information**

Notifications - Consolidated overview and quick access to a range of upcoming and overdue events e.g. contract conditions due & upcoming settlements **Click here for further information**

Announcements - Keep up to date on all of Agentbox's latest feature releases and enhancements. **Click here for further information**

The McGrath Sales Process

Add a task

1. Click add a task from your **Quick Add**, **Schedule**, **Property**, **Contact** or the **Task View** screen

2. Complete the task details:

Task Due: - the date the task is due
Headline: * - compulsory field
Description: - if applicable
Responsible Staff: *- compulsory field
Assign Contact: - to link the task to a contact
Assign Property: - to link the task to a Prospect, Appraisal or Listing
Assign Action: - to link an action e.g. create a letter
Selected Actions: lists the assigned action, if send a letter; E-Newsletter etc. you can select the template
Task Completed?: - Check this box to complete a task

3. Hit **Save**, the task will appear in your task view on it's due date

or

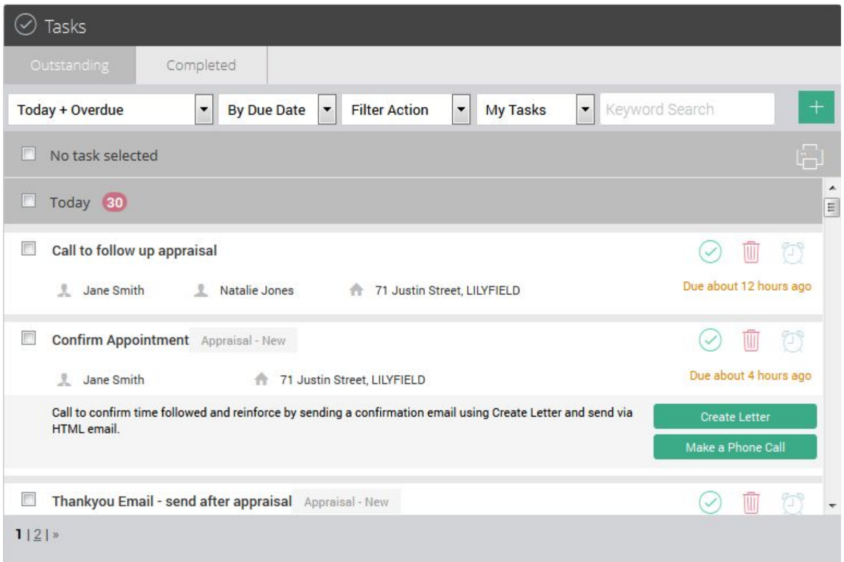
4. Hit **Save & Add file**, to upload and attach a document to your task.

The McGrath Sales Process

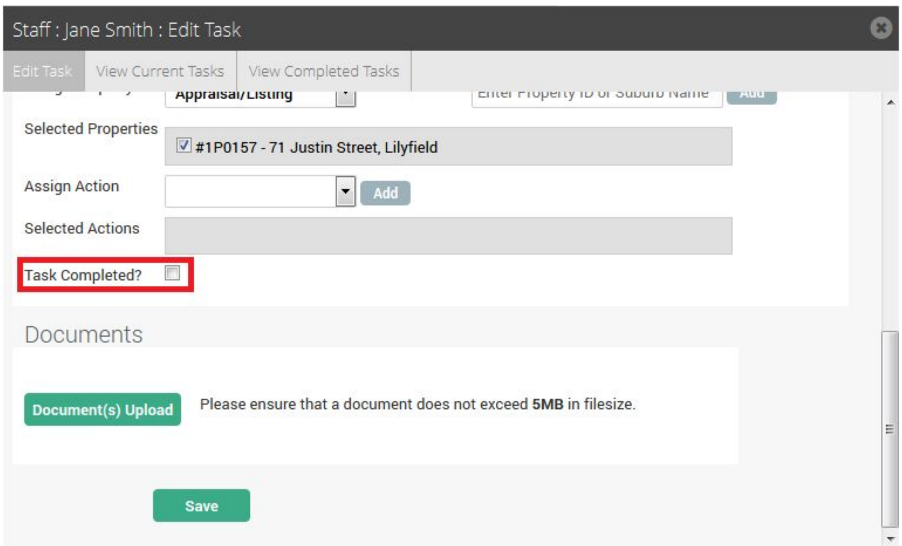
Complete a task

1. You can mark a task complete in the Task View or by Editing a task

2. In the Task View, The action icon allow you to quickly Complete individual tasks



3. The next example is by Editing a task. Tick the **Task Completed** check box and click **Save**



4. You can view your completed tasks in the related property, contact or from your completed tab in the task view.

The McGrath Sales Process

Creating an Activity Schedule

Activity schedules allow you to create a list of common tasks such as follow-up calls, emails, letters, SMS, e-newsletters etc that need to be completed after a trigger. These can be assigned to both properties and/or contacts.

E.g. when a property is changed from 'Appraisal' to 'Listing' you can apply an activity schedule with all the tasks that need to be completed. The schedule can have tasks assigned to multiple people for example in a 'New Listing' schedule you may have certain tasks assigned to an administrator such as organise photographer, notify tenants and other tasks assigned to the listing agent of the property such as organise inspection times with owner.

Or perhaps you have met a new prospective vendor that you have set up as a contact and would like to have a series of follow-up reminders activated. E.g, a 4 x weekly follow up calls. This can be set up as an Activity Schedule template which then gets applied to any prospect that meets this criteria.

You can even create generic schedules with tasks you would like to complete in a specified time frame that do not necessarily apply to a specific contact or property. For example a Spring Prospecting Campaign. This schedule will have a list of tasks you would like to be reminded of in your task list during this campaign e.g. 1, 2 and 3 months after start date send Spring Newsletter, call Hot Prospects at week 1, 6 and 12 etc.

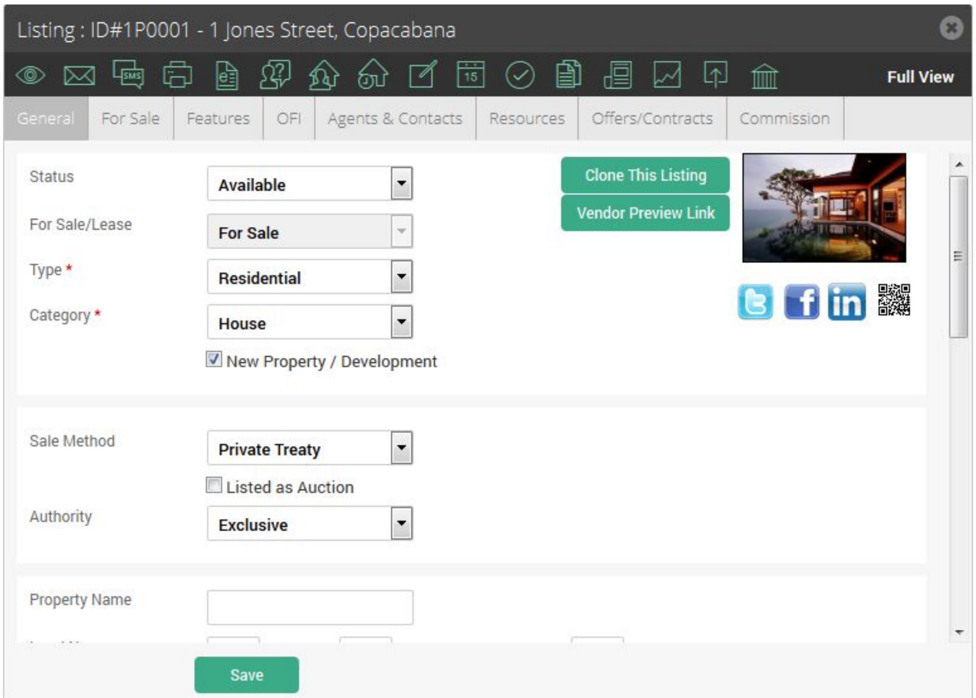
When a schedule is applied you can specify a start or due date. All tasks in the template will generate based on this date e.g. 1 week after, 1 month before etc. You can link SMS, Email, Letter and E-Newsletter templates to specific tasks to be generated straight from your to do list saving you time and increasing your productivity.

McGrath

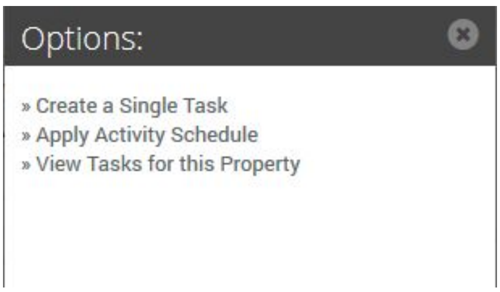
The McGrath Sales Process

Creating an Activity Schedule

1. Search for your Property and open the Property Card



2. Click the Tasks icon 



3. Select the relevant option

If you select view tasks for this property the property task view will appear, here you can add a task, delete a task, view current property tasks or view completed property tasks.

McGrath

The McGrath Sales Process

Life Cycle of a Vendor/Owner

Prospect Property

- Contact Assigned as Owner or Absentee Owner

Convert Prospect Property **to Appraisal**

- On the property card the Owner or Absentee Owner is automatically assigned as the Prospective Vendor (Sale Listing).
- On the contact record they will remain as an Owner or Absentee Owner but also be assigned the new contact class Prospective Vendor automatically.

Convert Appraisal to **Listing**

- On the property card the Prospective Vendor (Sale Listing) is automatically assigned as the Vendor.
- On the contact record they will remain as a Prospective Vendor or Prospective Landlord but also be assigned the new contact class Vendor or Landlord automatically.

Mark Sale Listing as **Settled**

- On the listing card the Vendor remains as the Vendor for that sale.
- On the contact record they will remain as a Vendor and also be assigned the new contact class Past Owner automatically.
- On the Prospect record they will automatically be updated as the Past Owner

The McGrath Sales Process

Life Cycle of a Buyer

On Market Listing

- Any contact created via a logged inspection attendee, enquiry or offer will be assigned with the contact class Prospective Buyer (or whatever has been customised in System Config by a master user for that office).

Mark Listing **Under Contract/Unconditional**

- On the listing card the Buyer assigned in the Offers and Contracts tab will be assigned to the listing as the Buyer
- On the contact record they will remain as their previous category e.g. Prospective Buyer but also be assigned the new contact class Buyer automatically.

Mark Listing **Settled**

- On the listing card the Buyer remains as the Buyer for that sale.
- On the contact record they will remain as a Buyer and also be assigned the new contact class Owner automatically.
- On the Prospect record they will automatically be updated as the new Owner

The McGrath Sales Process

Frequently Asked Questions

Q: What is my Agentbox username?

A: Your username will always be the email address located in your staff card, under the Staff Details tab.

Q: What do I do if I forget my password?

A: If you have forgotten your password click Forgot Password on the login page. Enter your email address and click Submit. A temporary password will be emailed to your email address. *Note, to activate the new password you must go through the login link in the email.

Alternatively, a Master User can reset your password through the Access tab of your staff card.

Q: How do I change my password?

A: Click your name in the top right-hand corner of the header and select Change Password from the drop-down menu. Enter your new password and click Save.

Q: Why can't I see all my targets on the dashboard?

A: These can be configured by someone in your Operations Team. See next page.

Q: Why can't I access the Prospector function?

A: This can be setup and configured by someone in your Operations Team They will need your RP Data username and password, as well as confirmation of the suburbs you will be covering (with Sales Manager approval).

McGrath

The McGrath Sales Process

Setting up Targets for Yourself and Team

via Agentbox

The **Targets Dashboard** provides you with quick access to a visual representation of your core KPIs to measure performance against targets in real time.

To set up your targets, please email an Admin/Master user your monthly targets for the below components so that we are able to start to tracking your activity:

2022	New Contacts	Call Attempts	Call Connections	No. of Appraisals	No. of Presentations	No. of Listings	No. of Sales
Jul 2021:							
Aug 2021:							
Sep 2021:							
FY Q1 Total:							

See points below which break down how the system tracks your activity:

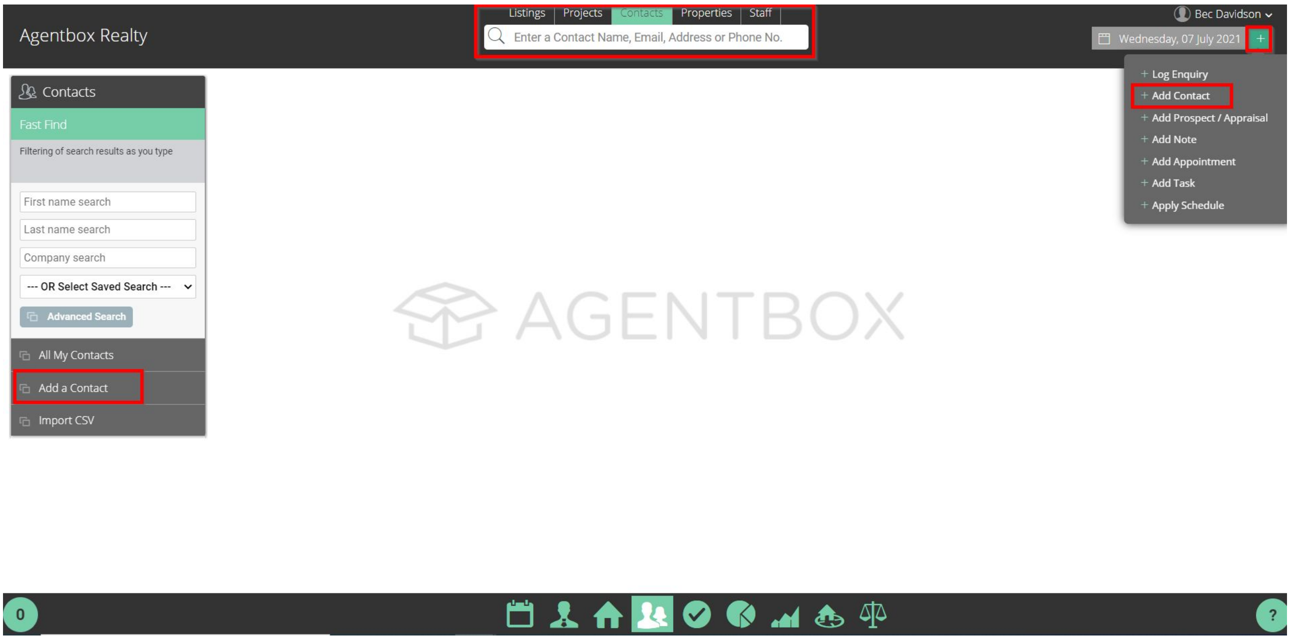
- **New Contacts** | The number of contacts created within the specified period where the selected user has 'Full Access'.
- **Call Attempts** | The number of Outbound Phone Calls logged (by note date) within the specified period where the Outcome is: **'Connected', 'Left Voicemail'** or **'No Answer'.**
- **Call Connections** | The number of Outbound Phone Calls logged (by note date) within the specified period where the Outcome is **'Connected'.**
- **Appraisals** | The number of Appraisals with an 'Appraisal Date' within the specified period where the selected user is the **'Appraisal Agent'.**
- **Presentations** | The number of Listing Presentations with a 'Presentation Date' within the specified period where the selected user is the **'Appraisal Agent'.**
- **Listings** | The number of Listings with a 'Listing Date' within the specified period where the selected user is the **'Listing Agent'.**
- **Sales Written** | The total split number of Unconditional Listings with a Contract Date/Unconditional Date within the specified period.

McGrath

The McGrath Sales Process

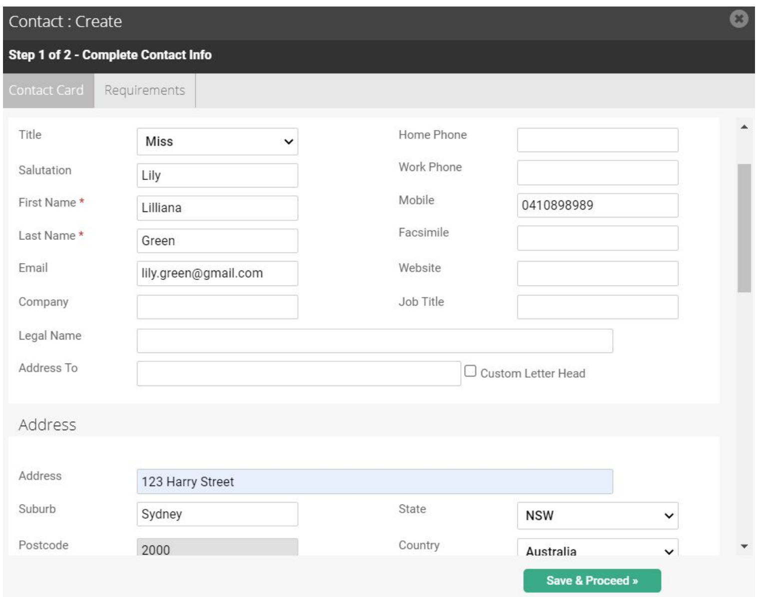
Add A Contact

1. A contact can be added to the system via -
Universal Search Bar, Quick Add in the top right-hand corner or via the **Contacts** tab.



2. **Contact: Create** box will appear when an 'add a contact' method is selected.

Fill out applicable details on this screen.

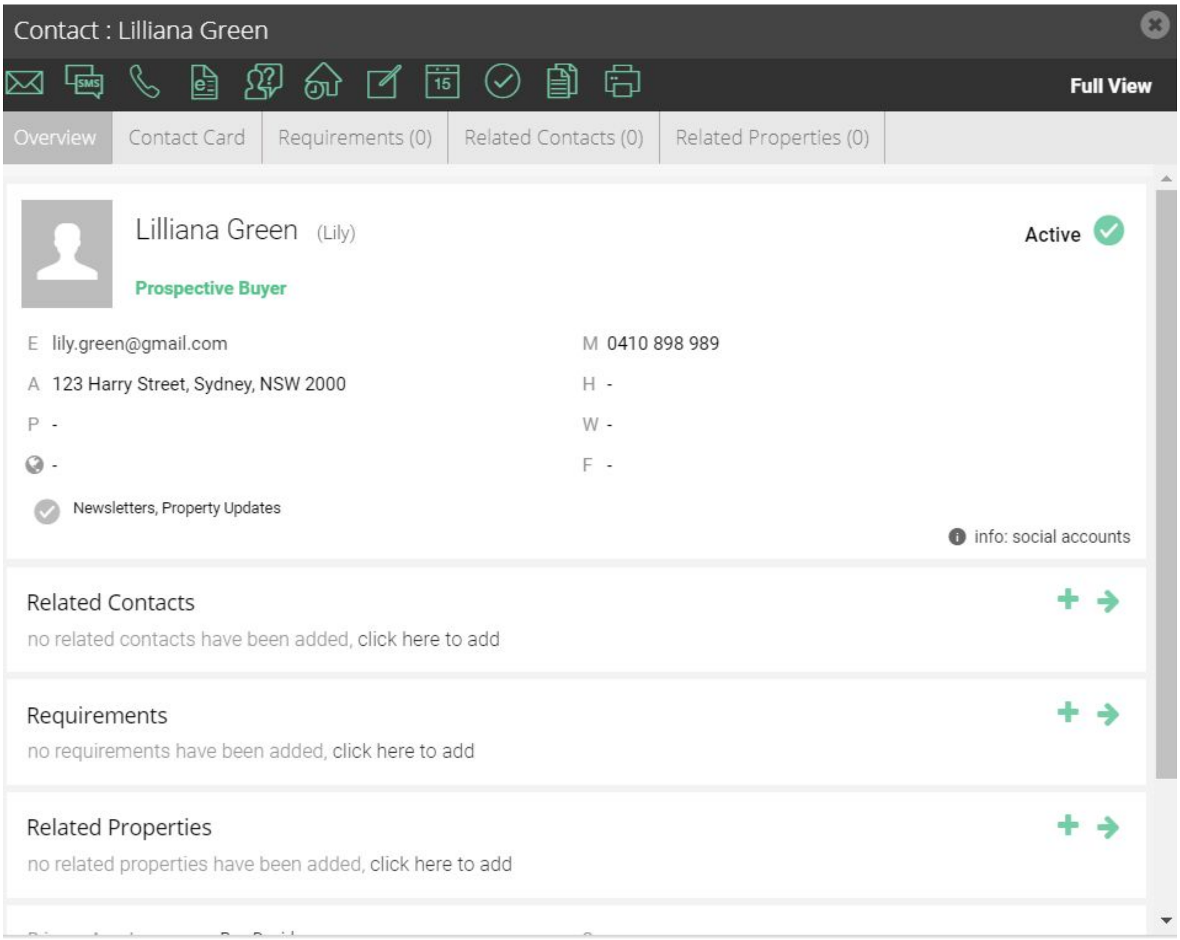


The McGrath Sales Process

Add A Contact

3. Click **Save and Proceed**

Contact card will now be created and will appear on the screen with contact details.



Notes:

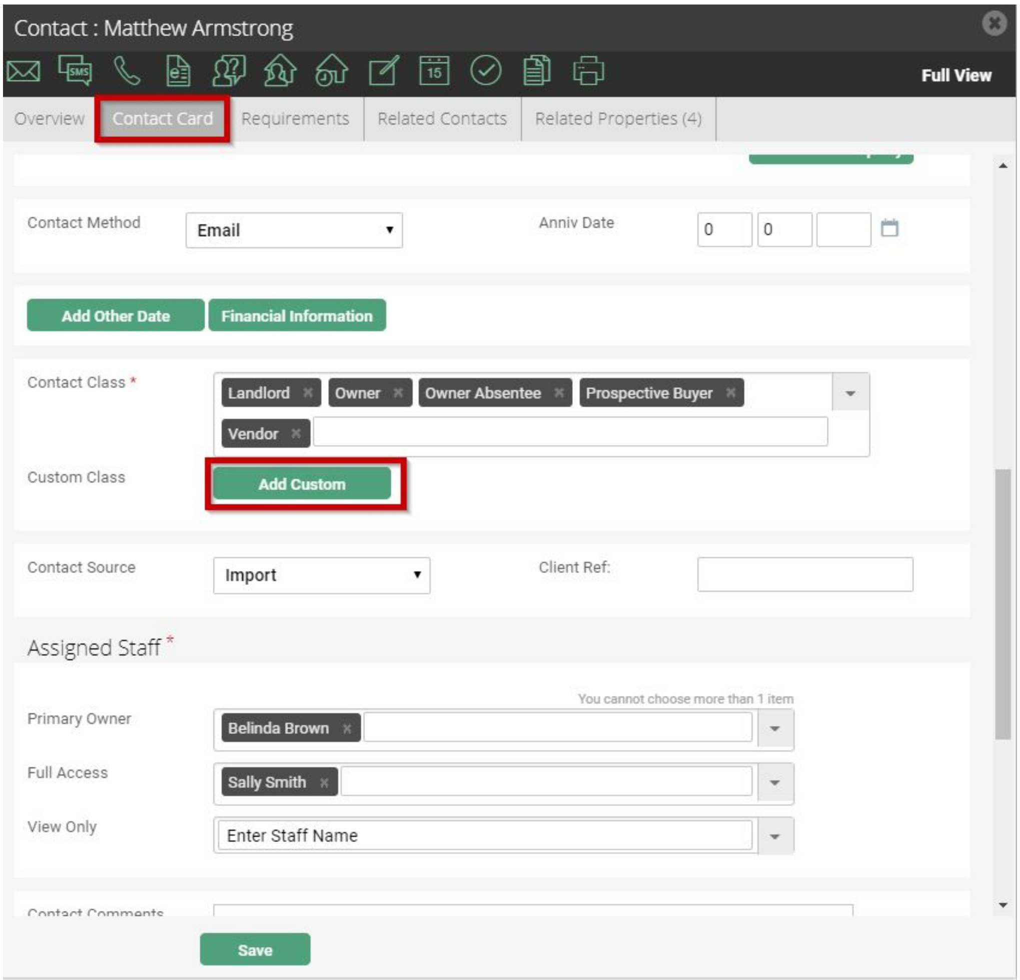
- Mandatory fields will have a red asterisk*.
- Agentbox requires either an email address or mobile to eliminate the possibility of duplicates. A contact can still be created with only a phone number or physical address.
- Assigned Agents need to be entered in the 'Full Access' section ONLY.
- Subscribing to Newsletters is important for buyers to be able to receive automatic Property Alerts.

The McGrath Sales Process

<u>Add your own Custom Contact Classes</u>

1. **Search for your Contact** and open their Contact Card

2. Click the **Contact Card** tab

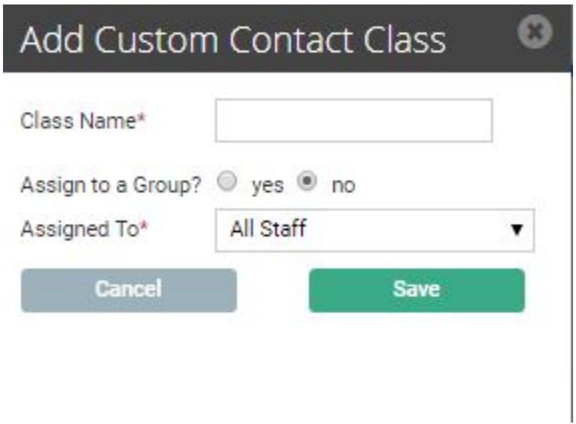


3. Click **Add Custom**

The McGrath Sales Process

Add your own Custom Contact Classes

4. Complete **Class Name** and **Assign to a Group** if applicable



5. Click **Save** to finish.

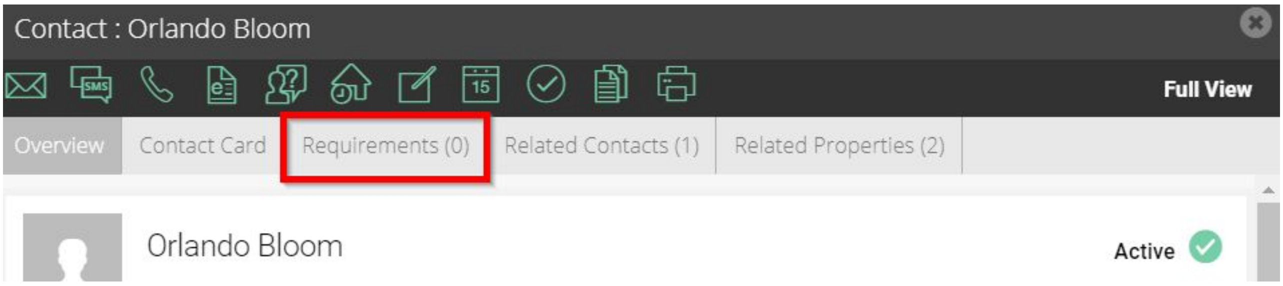
The McGrath Sales Process

Add Buyer Requirements

Adding Buyer/Tenant Requirements will allow you to match the Prospective Buyer or Tenant to suitable listings or subscribe and allows them to receive automatic Property Alerts.

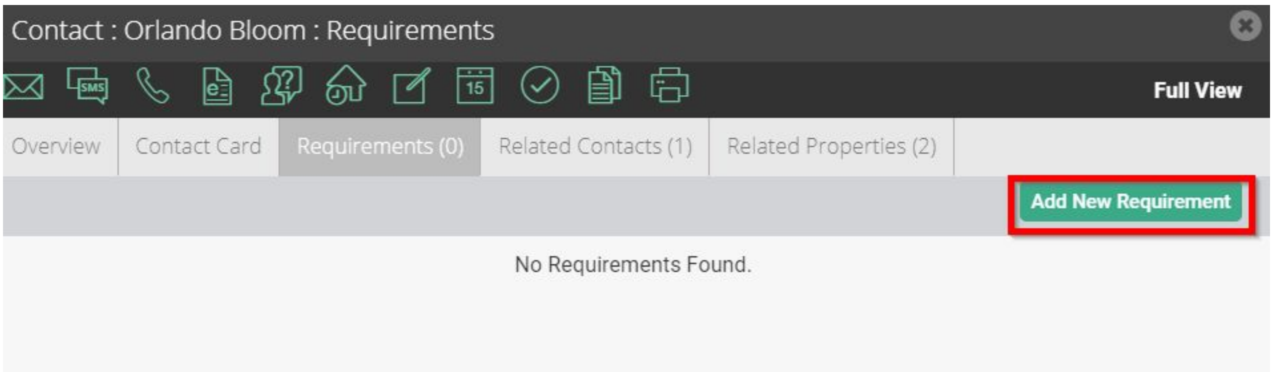
Click here to view how to add Contact Requirements In the Mobile App.

1. Search for your Contact to open their Contact Card then, click on the **Requirements** tab.



The **Requirements** tab will show you any property preferences linked to the contact. These requirements will be added automatically when a contact attends an inspection or makes an enquiry and can also be added manually.

2. To Add, click **Add New Requirement**



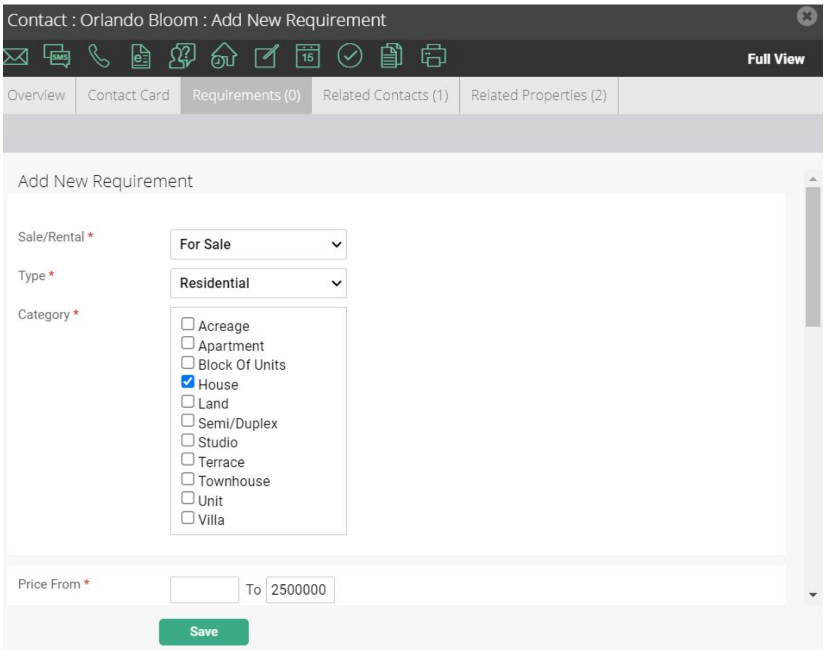
McGrath

The McGrath Sales Process

Add Buyer Requirements

3. You will be able to add in the below categories -

Note - all categories with a red asterisk* are mandatory



Scroll down and complete the following information as a minimum (the more specific the criteria, the LESS property alerts the buyer will receive. The broader the criteria, MORE alerts will be sent through)

Price range

Bedrooms

Selected Suburbs

Option to Include surrounding suburbs

(You have the option to either select specific suburbs as above OR you are able to select a region.)

Features can also be added eg. Air conditioning/ Built-in wardrobes etc.

Notes - Any additional notes you would like to add

McGrath

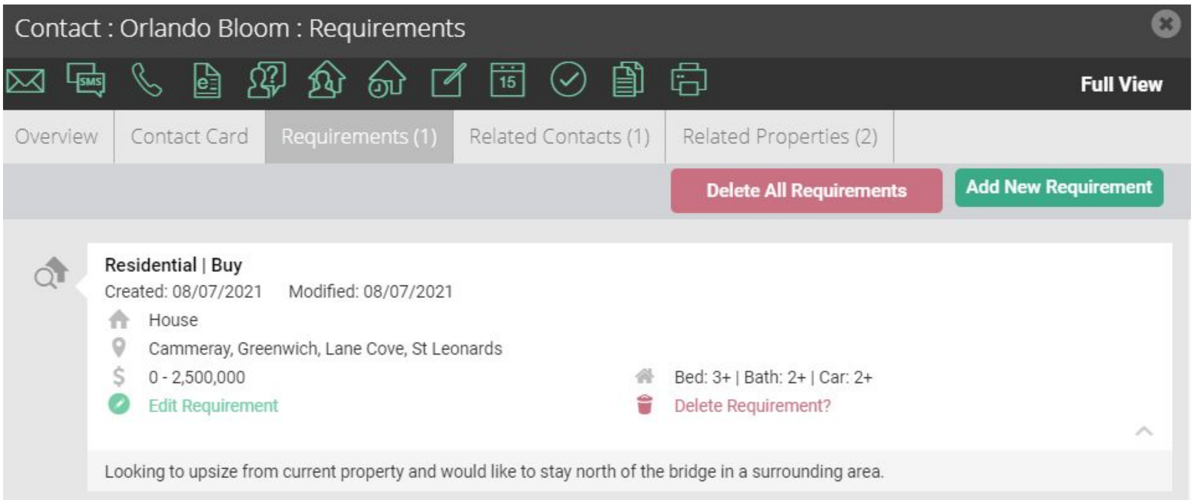
The McGrath Sales Process

Add Buyer Requirements

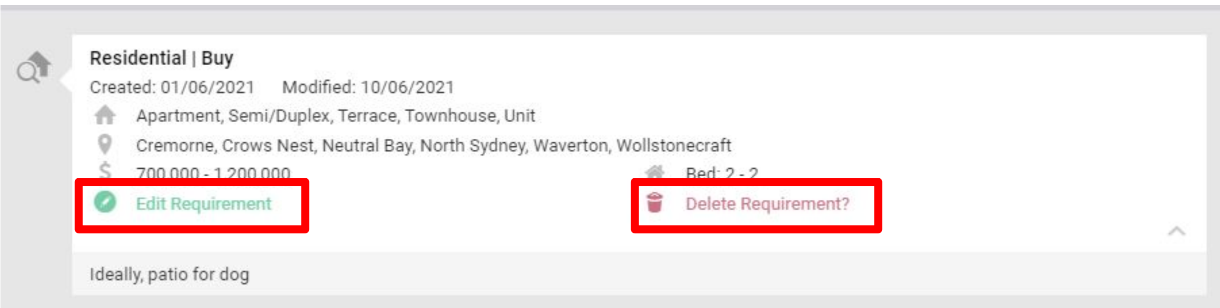
4. Click **Save**

Requirements will now appear under the **Requirements** tab of the contact card.

Note: A user can manually add up to 5 requirements per contact, however, more than 5 sets can still be applied via automatic requirements (based on your Inspection, Enquiry & Leads (if appliable) configurations).



5. To **Edit** requirements, click on **Edit Requirement**. Make changes as required, then Click **Save.** Requirements will now be updated.



7. To **Delete** all requirements related to the contact, click **Delete All Requirements** and a warning box will appear. To confirm, click **Yes**.

Add A Related Contact

If both contacts share communication/contact info e.g. you can reach either of them from a single email, mobile, phone or address then add them both in the same contact card using the primary contacts first and last name then using the salutation field to enter both contacts names.

For Example:
Salutation: Jeff & Carol
Legal Name: Mr Jeff Richard Jones & Mrs Carol Lisa Jones
Address To: Mr & Mrs Jones
First Name: Jeff
Last Name: Smith

In the case of two contacts in the one contact record who do not share a surname:
Salutation: Jeff Smith & Carol White
Legal Name: Mr Jeff Richard Smith & Mrs Carol Lisa White
Address To: Mr Jeff Smith & Mrs Carol White
First Name: Jeff
Last Name: Smith

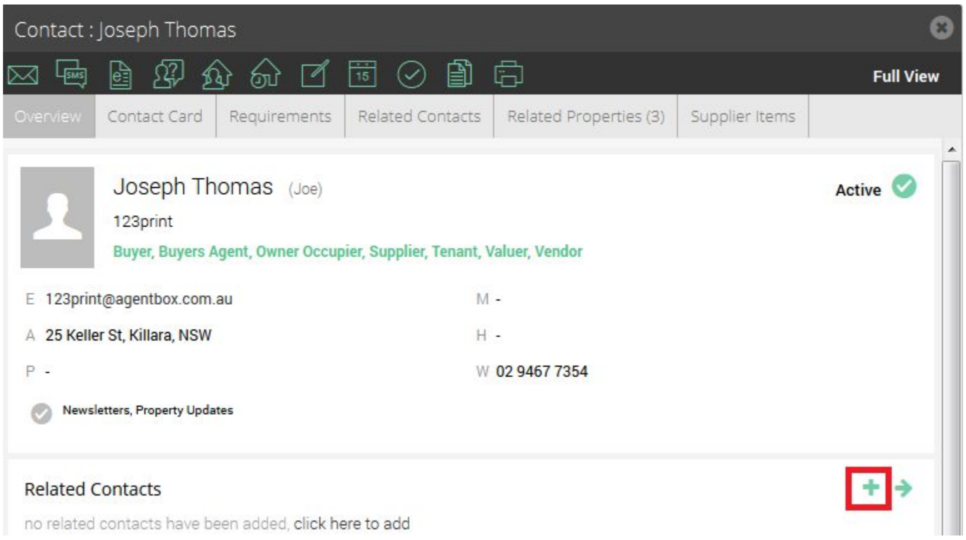
If both contacts have their own unique contact info e.g. 2 mobile numbers you will also need to create a related contact using the following steps. This is to help keep a clean database where your contacts are contactable separately e.g. in the case of a couple that has separated since your dealings with them.

The McGrath Sales Process

<u>Add A Related Contact</u>

1. **Search for your Contact** open their Contact Card

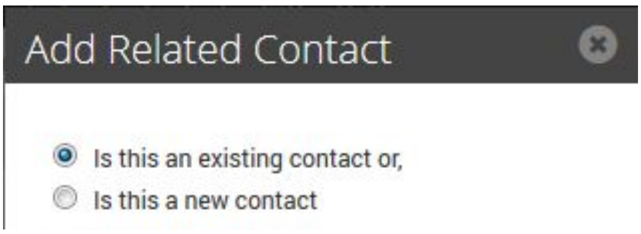
2. Click the **Quick Add** icon on the Overview tab or open the related contacts tab and select Add Related Contact



3. Select

Is this an existing contact or

Is this a new contact

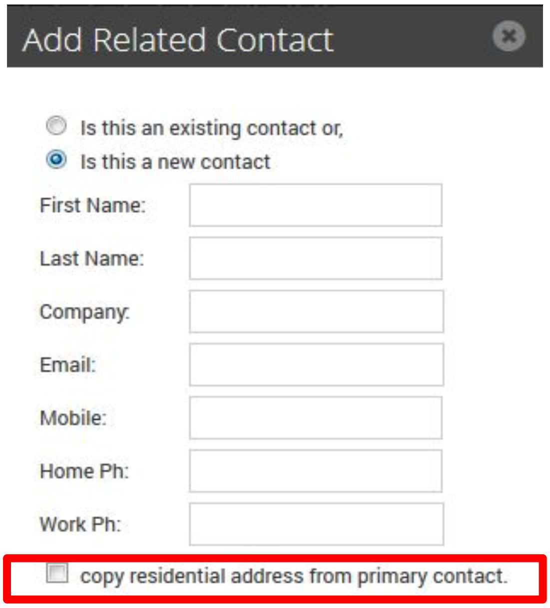


4. If an existing contact then enter contacts name in Select Related Contact:* as seen above and select the corresponding contact from the results drop down or if it is a new contact, enter the relevant information.

McGrath

Add A Related Contact

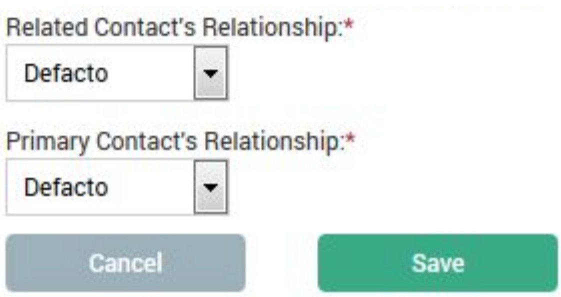
If the related contact shares the same residential address as the primary contact, tick the **Copy residential address from primary contact** check box.



5. Select the contacts relationship to each other. Select other to enter a custom relationship

Related Contact's Relationship: (THIS IS THE NEW CONTACT WE ARE ADDING)

Primary Contact's Relationship:* (THIS IS THE FIRST CONTACT ENTERED)



6. Click **Save**

You can now view the **Related Contact** on the contact Overview or Related Contacts Tab. Click their **Name** to open their contact summary.

The McGrath Sales Process

Appraisals

Agents have different ways of doing their appraisals. Not every agent is the same. As you get to know your agent, you understand what they prefer.

Ensure you clearly understand what your agent prefers for the preparation of their appraisal documents.

General things agents ask for in their appraisals:

1. <u>Agency Agreement</u>

   95% of the time when an agent goes to an appraisal, they will ask you to print off a blank agency agreement, or they will give you certain details to fill out in the agency (e.g. Name/Address/Auction date/Commission etc.)

   * See *Creating an Agency Agreement*

2. <u>Marketing Calendar</u>

   Each agent has their own style of how they like their marketing calendars. All you have to do is take the new information your agent has provided and fix the marketing calendar as per new dates and tasks etc. This can also be included in the Pitch Presentation explained further below.

   See in TemplatesFolder, different style calendars that you can use.

The McGrath Sales Process

Appraisals

3. Marketing Quote

When creating a marketing quote, gather as much information as possible from the agent. * See *Creating a Quote in CT*.

Vital Information that you will need to be able to complete a quote is:

- Price guide of property (this is for your domain upper/middle/lower)
  - $0 - $900,000 - LOWER BAND
  - $900,000 - $2,500,000 - MIDDLE BAND
  - Over $2,500,000 - UPPER BAND
- How many bedrooms in the property (this is for your floorplan)

4. Pitch Proposal

Pitch proposals are super convenient and helpful.

There are two types of Pitch Proposals.

1. Pre-List
2. Full Proposal

- ➢ Log into your Pitch account.
- ➢ Click the Green Create button in the top left corner.
- ➢ Select your primary agent.
- ➢ Search and select your property. -> Select property type
- ➢ Select whether you want a Pre-List or Full Proposal.
- ➢ Enter Your property/vendor details.
- ➢ Follow steps on the left from top to bottom and fill out the relevant information.

The McGrath Sales Process

Appraisals

5. <u>Comparable Sales/Relevant Sales</u>

   Your agent may ask you to create a template of comparable sales that they have chosen from.

   They may also ask you to create a CMA via Corelogic. (RP Data)

   - ➢ To do so, login to your CoreLogic account.
   - ➢ Look up the property.
   - ➢ Under "Property Tasks" click on "Signature CMA Report"
   - ➢ Refine your search.
   - ➢ Select your comparable sales, then click next and select your comparable listings.
   - ➢ It will then give you an overview of what your CMA will look like. Have a look and edit it as you feel. Make sure details are correct. If you scroll down you have the choice to add Local schools, Recent Market Trends, Long Term Market Trends.

Agents may ask you to draft up an appraisal letter to give to the potential vendor. Please see "Appraisal Letter" in your Templates folder for an example.

Agents may also ask you to create listing letters to vendors/vendors solicitors. Please find examples of these in your templates folder. These can also be sent via Agentbox.

McGrath

The McGrath Sales Process

Add A Related Property (Appraisal)

A related property is a property that the contact has a relationship with but may or may not reside in. For example if Joseph Thomas lives at 25 Keller Street, Killara then you would put this as his residential address on the Contact Card. If he also owns this property or perhaps owns an investment property at another address then this will be created as a related property.

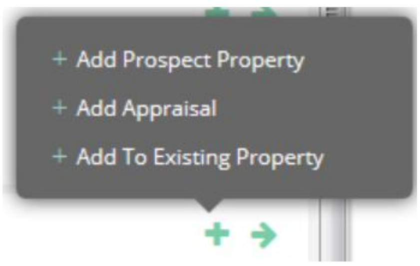
You do not have to be appraising or listing the property to create the address as a related property. You simply create the address as a prospect record.
You can also create it directly as an appraisal which will also automatically create the prospect record or you can choose to attach them to a property that already exists in the database.

You can **Delete/Remove a Related Property** via the property record. Click here to learn more. *Note: Related Properties ARE NOT listings that the contact has shown interest in as a buyer or tenant. To view those listings please refer to **Buyer/Tenant Activity.**

1. Search for your Contact open their Contact Card

2. Click the **Quick Add** icon on the Overview tab or open the Related Properties Tab and select **Add Property**

3. Select if you would like to **Add a Prospect Property**, **Add an Appraisal** or **link the contact to an Existing Property in your database**

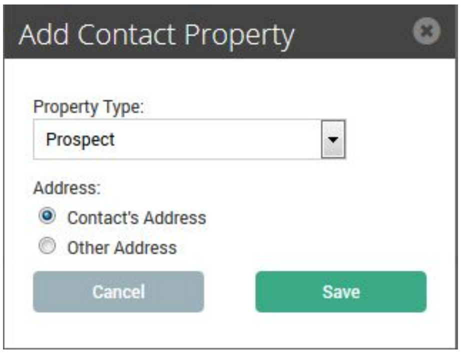


The McGrath Sales Process

Add A Related Property (Appraisal)

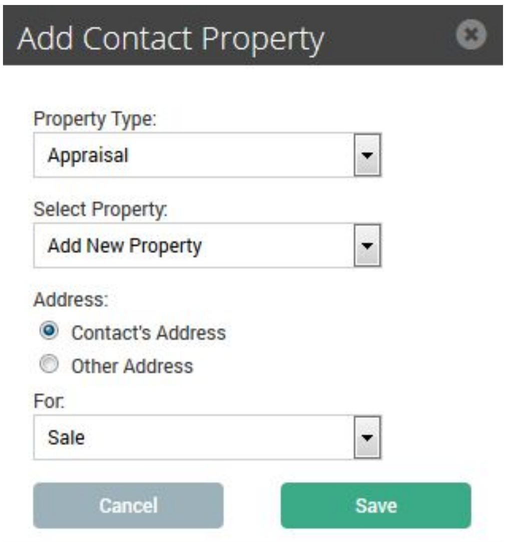
Add Prospect Property

- Select if you would like to create a Prospect Property using the contacts residential address or by entering a new address
- Click Save



Add Appraisal Property

- Select if you would like to create a new appraisal or create from existing Prospect record
- If New, select if you would like to create the appraisal using the contacts residential address or by entering a new address
- Select if the Appraisal is For Sale or For Lease
- Click Save



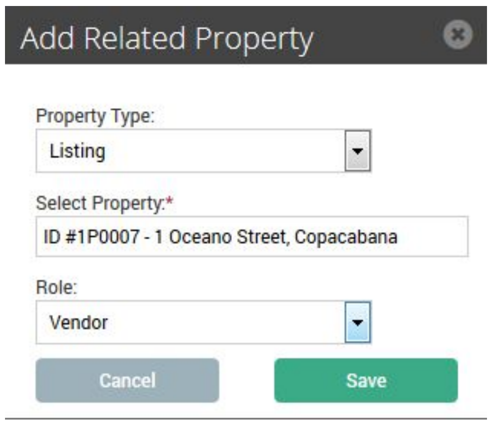
McGrath

The McGrath Sales Process

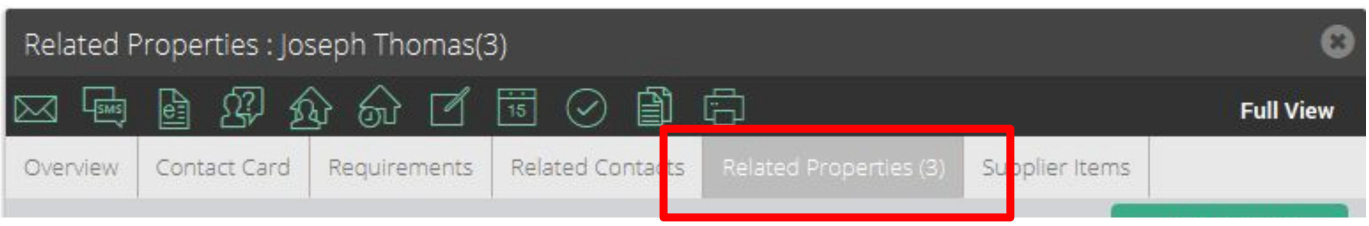
<u>Add A Related Property (Appraisal)</u>

Add to Existing Property

- Select type of existing property
- Enter the property address in the Select Property:* search box then select the property you would like to relate from the results drop-down
- Select how the contact is related to that property in the Role drop-down e.g. Vendor
- Click **Save**



4. The property will now appear in the Related Properties tab of the Contact Card and the Contact will appear on the Agents & Contacts tab of the Property Card



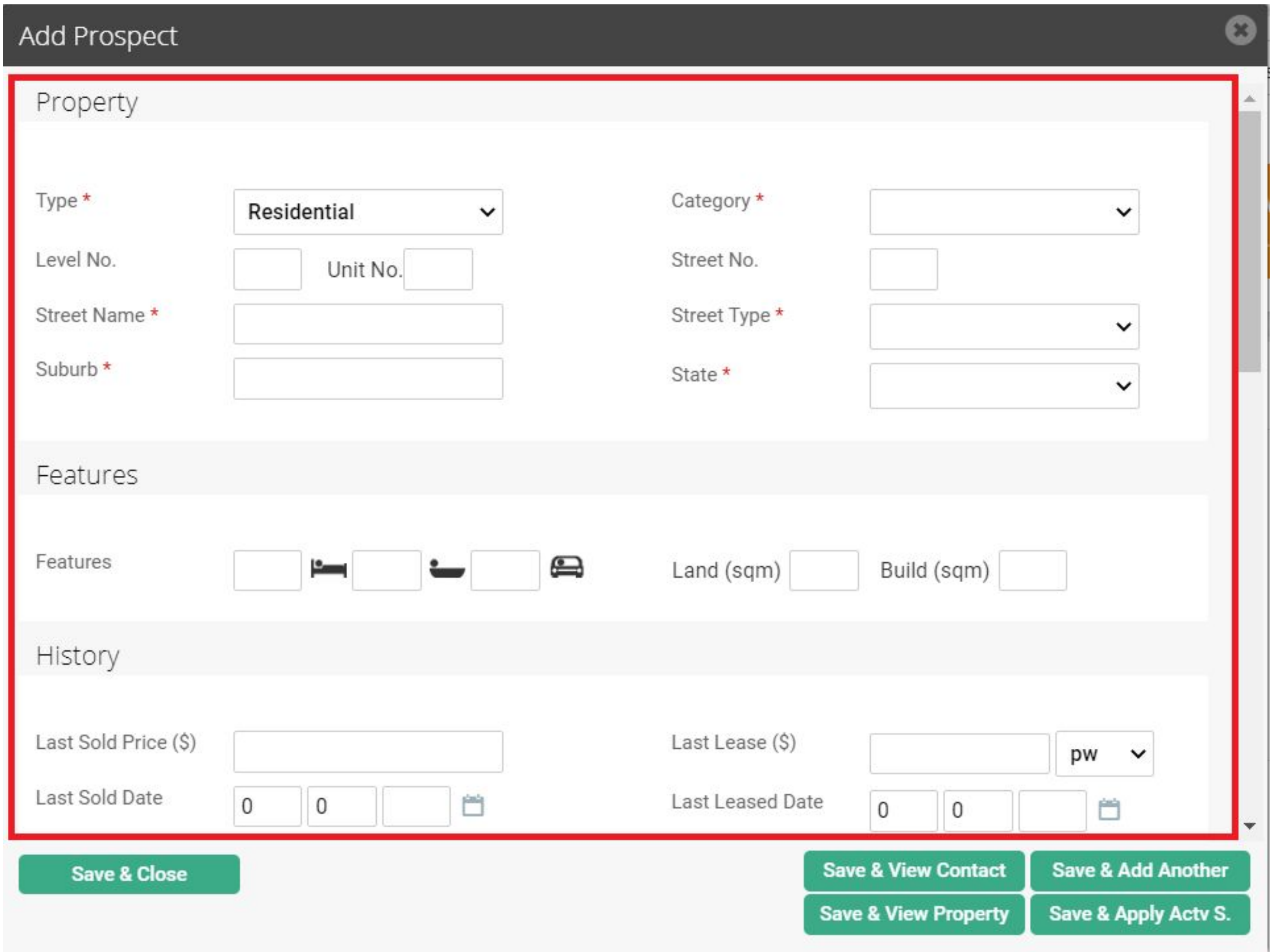
The McGrath Sales Process

<u>Adding Prospect/Appraisal details</u>

5. **Property, Features, and History Details.**

Enter the **Property Address, Features,** and **History**.

Note: red asterisks * indicate a mandatory field to complete.



The McGrath Sales Process

<u>Adding Prospect/Appraisal details</u>

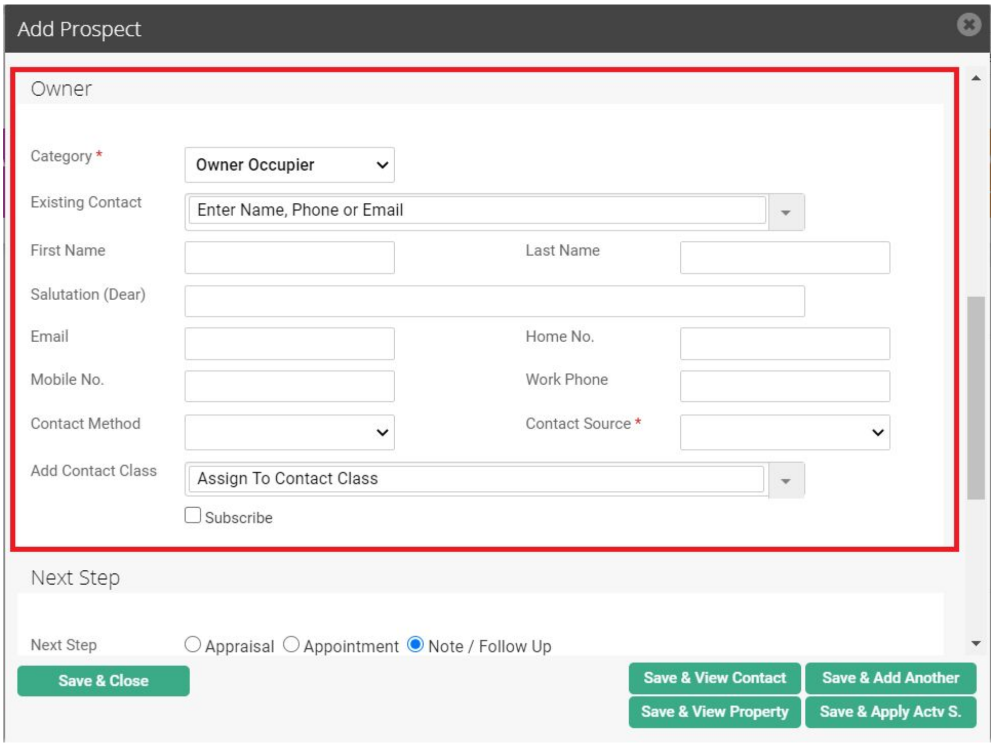
6. **Owner details.**

If you added the appraisal as a Related Property, the owner details will automatically feed through. Note: red asterisks * indicate a mandatory field to complete.

Assignment contact class categories for owners:

- **Owner Occupier**: If the owner is occupying the address.
- **Owner Absentee**: If the owner is currently not living within the property, for example, if the property is being leased.
- **Owner**: If you are unsure, you can simply assign as owner.

Note: You should only ever assign these contact classes on a Prospect Property record.



McGrath

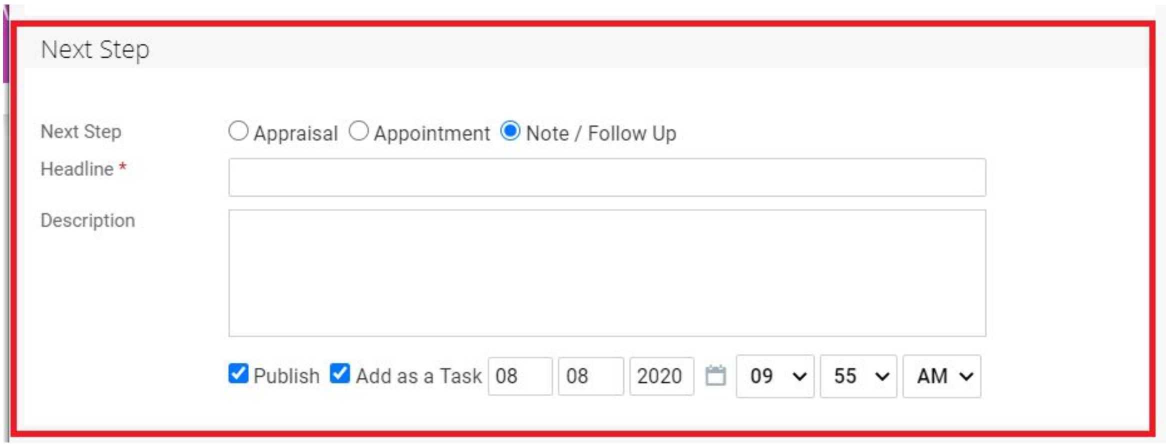
The McGrath Sales Process

<u>Adding Prospect/Appraisal details</u>

7. **Next Step details.**

Complete the next step if applicable, this is where you can create the Prospect as an **Appraisal,** book an **Appointment,** or log a **Note/Follow Up.**

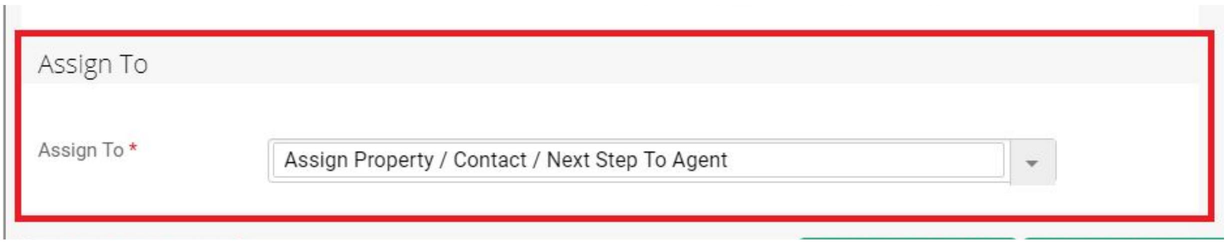
Note: red asterisks * indicate a mandatory field to complete.



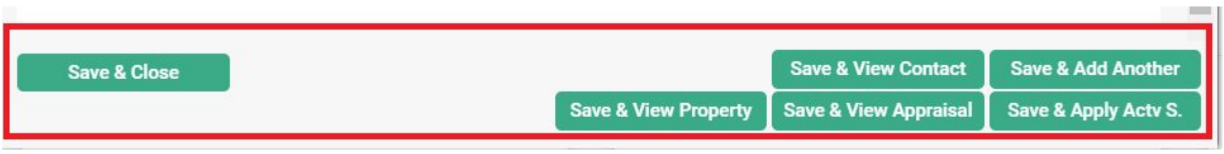
8. **Assign to details**.

You will also need to assign this to a staff member.

Note: red asterisks * indicate a mandatory field to complete.



9. Select your preferred **Save** option.



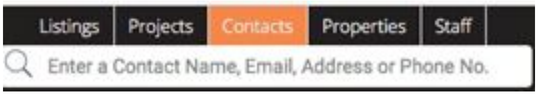
McGrath

The McGrath Sales Process

Merging a Duplicate Contact

via Agentbox

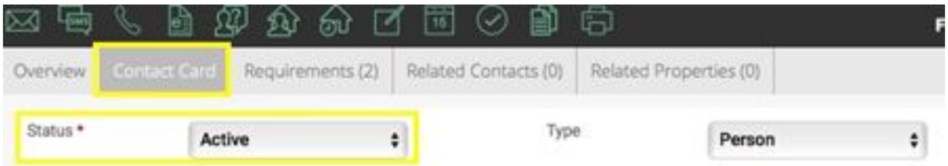
1. Go into the contacts tab in Agentbox.



2. Search up the contact you wish to merge and click on their contact card.

3. Select the ‘Contact Card’ tab.

4. Select the status Drop-down menu and change from ‘Active’ to ‘Merge with Duplicate’. If you do not have this option, you may need to request higher access permissions from an Admin/Master user.



5. Search and select the duplicate contact’s name you wish to duplicate

6. Tick the box on the bottom “I Agree”. Click ‘Proceed’.

Note: The details in the initial contact card that you open up will override the fields in the second duplicate contact. So ensure you are aware of this and save any additional information in the duplicate/second card that you do not want to lose. Once you click ‘Proceed’, this cannot be undone.

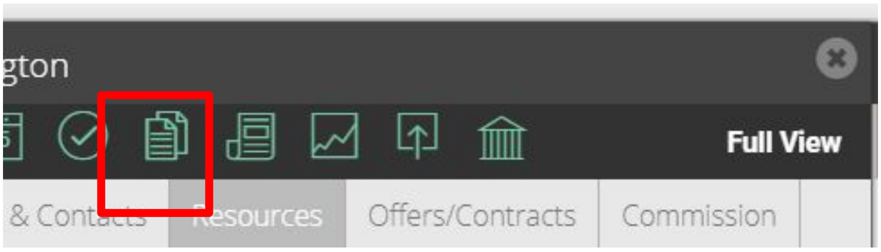
The McGrath Sales Process

Creating an Agency Agreement

Via Agentbox

Please note to create an agency agreement you need to save the listing as an appraisal in Agentbox

1. Go into the listing card in Agentbox
2. Click onto the letters tab (fifth from the right)



3. On the "select a category drop down menu, select "Agency Agreements"
4. On the "Select a template" drop down menu, select

"Agency Agreements | NSW Exclusive Agency Agreement 2021"

5. Click Save and Proceed
6. This will prompt you to a screen where you can now edit the agency agreement as required.
7. Once the agency is filled as you like, click save and proceed
8. Click Print PDF
9. Save as a PDF and print or email as required.

The McGrath Sales Process

Creating an Agency Agreement

Via Sign

Please note to create an agency agreement you need to save the listing as an appraisal in Agentbox

1. You will need to Log into Realtair.

2. Make sure you have switched to Sign.

3. Click on Create.

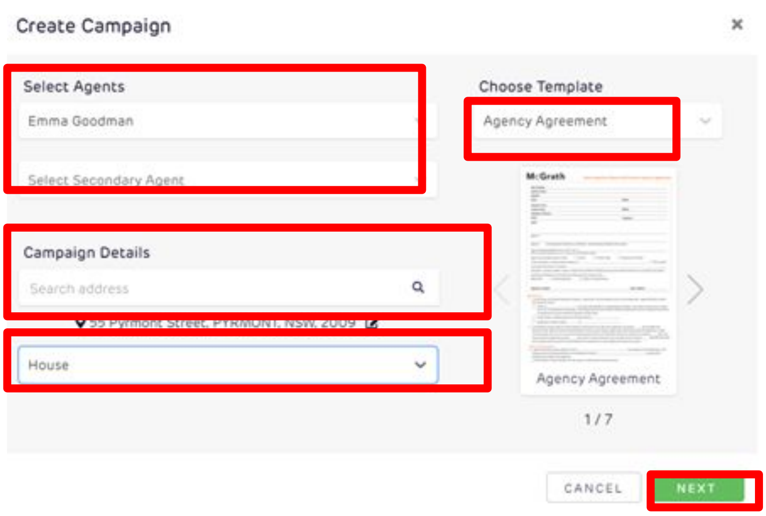
4. Create Campaign

- Choose your agent & secondary agent if applicable

- Choose your template, in this instance select pre-list

- Search your property address

- Select a property type, then click next.



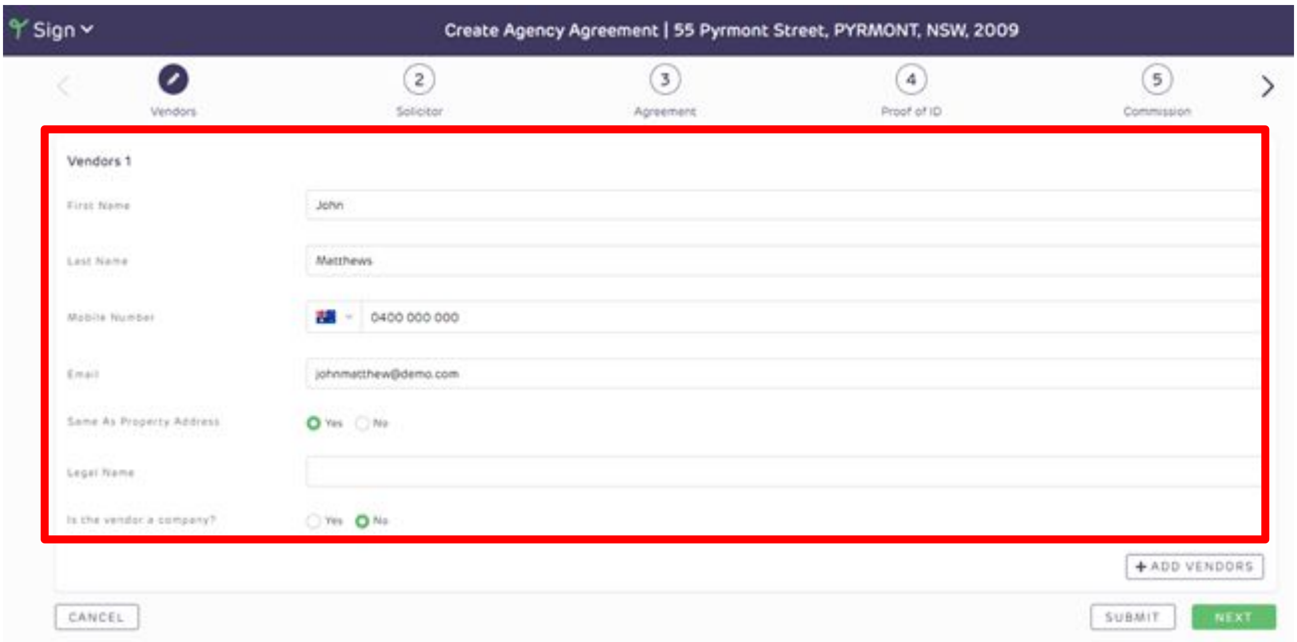
The McGrath Sales Process

Creating an Agency Agreement

Via Sign

5. On the next page, you will need to fill in the **Vendors Details.**

- First name
- Last name
- Mobile Number
- Email Address
- Select if Same as Property Address. If no – fill in residing address.
- Legal name – if applicable
- Select if Vendor is a Company.
  If Yes – You will need Company name & Company ABN / ACN
- Select +ADD VENDOR if applicable and complete same steps
- Once completed press NEXT.

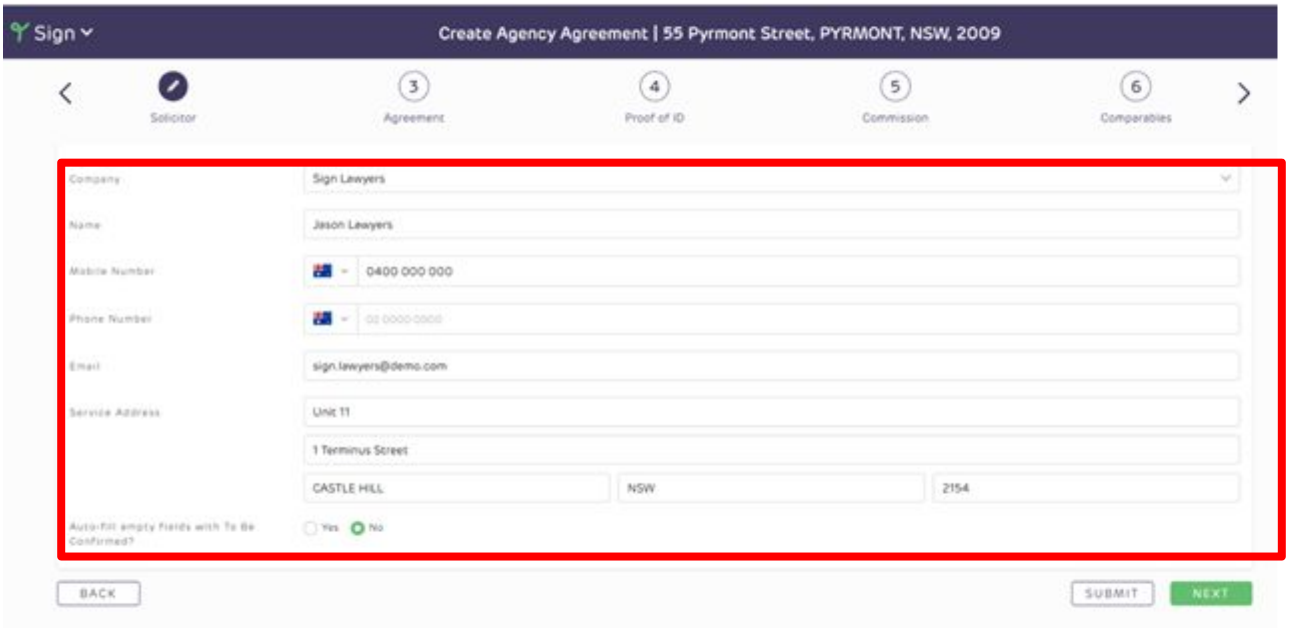


The McGrath Sales Process

Creating an Agency Agreement

Via Sign

6. Complete **Vendor Solicitors** details.
   - Company Name
   - Name
   - Mobile number / Phone Number
   - Service Address
   - Press **Next** to continue.



If you are unaware of solicitor details, you will need to press **Yes** next to **Auto- fill empty fields with To be Confirmed?**

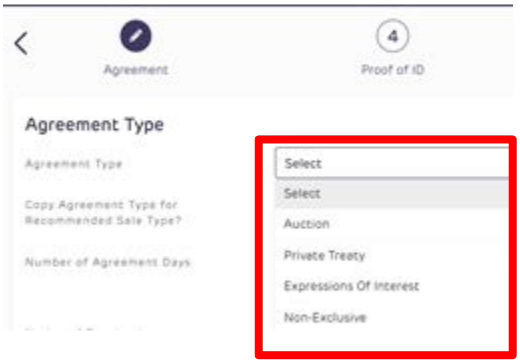
McGrath

The McGrath Sales Process

Creating an Agency Agreement

Via Sign

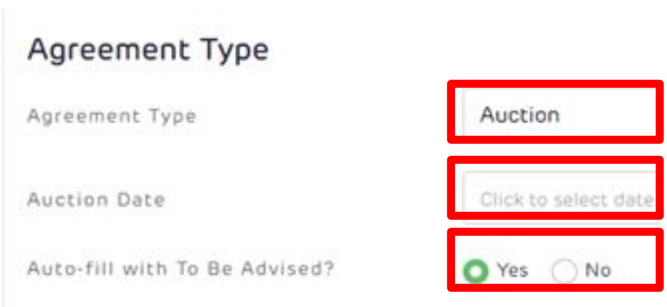
7. Select **Agreement Type** by clicking on Select. A drop-down box will appear.



Auction

- Select Agreement Type as Auction
- Select Auction Date
- If auction date has no be confirmed,

  click **Yes** for **Auto-fill with To Be Advised?**



McGrath

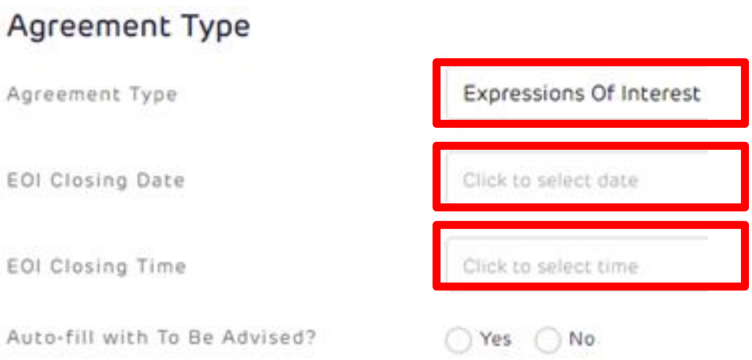
The McGrath Sales Process

Creating an Agency Agreement

Via Sign

Expression of Interest

- Select agreement type as Expression of Interest.
- Fill in EOI closing date and closing time.
- If date and time has not been confirmed – click Yes for Autofill with 'To Be Advised'.



Private Treaty or Non-Exclusive

- Click applicable one and continue to next step.

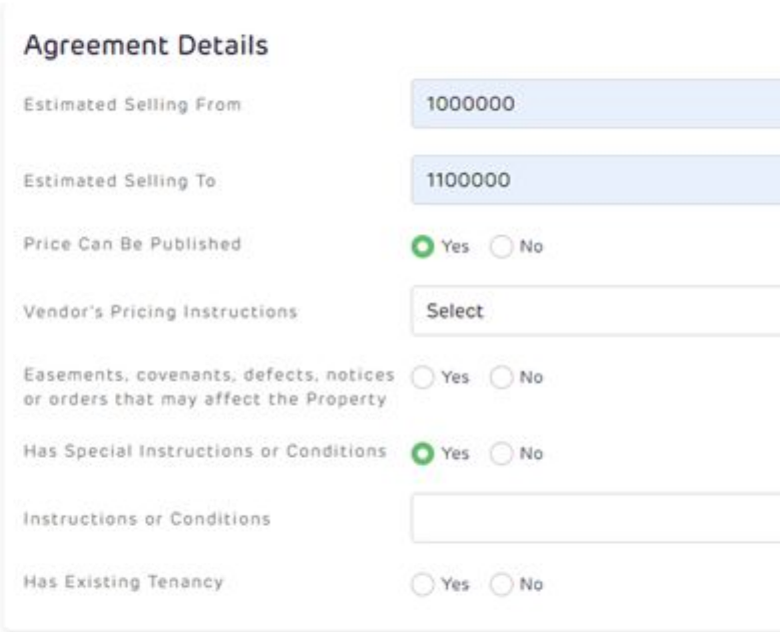
7. **Agreement Details**

- Estimated selling from / to.
- Can the price be published?
- Vendor's pricing instructions.
- Easements, covenants, defects, notices, or orders that may affect the Property?
- Instructions or Conditions – If Yes, text box will appear.
- Has existing tenancy?

McGrath

Creating an Agency Agreement

Via Sign


Agreement Details

Estimated Selling From: 1000000

Estimated Selling To: 1100000

Price Can Be Published: Yes / No

Vendor's Pricing Instructions: Select

Easements, covenants, defects, notices or orders that may affect the Property: Yes / No

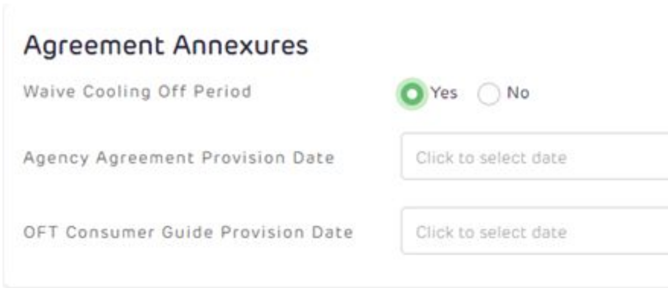
Has Special Instructions or Conditions: Yes / No

Instructions or Conditions

Has Existing Tenancy: Yes / No

8. **Agreement Annexures**

- Waive Cooling Off Period? If yes, select Provision Dates.


Agreement Annexures

Waive Cooling Off Period: Yes / No

Agency Agreement Provision Date: Click to select date

OFT Consumer Guide Provision Date: Click to select date

9. **Proof of ID**

- You will need to prefill your vendor/s proof of identification.

    - If you want your client to upload their own ID, click NO so that we can get them to remotely verify themselves before you request their signatures at the end.

Note: for the proof of identification boxes to show ensure you have ticked 'NO' to questions presented at the top of the screen.

McGrath

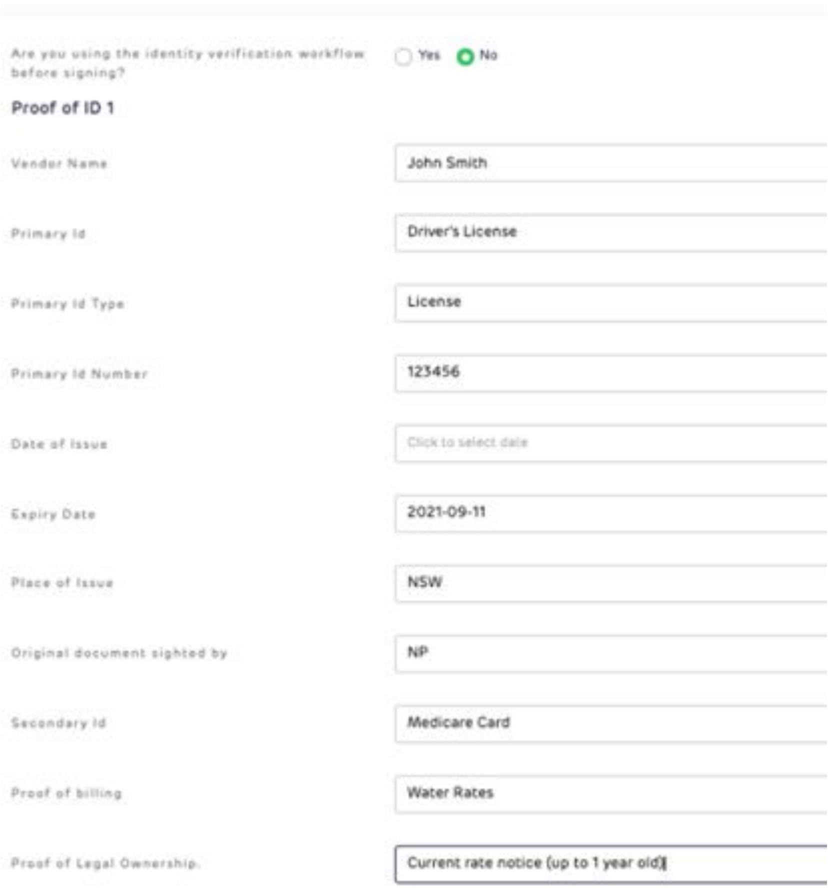
The McGrath Sales Process

Creating an Agency Agreement

Via Sign

Enter in all vendor/s details in the provided boxes:

- **Vendor name.**
- **Primary ID**: License or Passport.
- **ID Type**: type License or Passport.
- **Document number**: enter license number or passport number.
- **Date of issue:** This is applicable for passports, if you selected license you can leave this blank.
- **Date of expiry**: Add in expiration date of license or passport.
- **Place of issue.**
- **Original cited by**: Enter your name.
- **Secondary ID**: you can select either Medicare or credit card.
- **Proof of billing**: you can select either gas/electricity bill, water rates, electoral enrollment card, bank statement.
- **Proof of legal ownership**: council rates or land valuation.



Are you using the identity verification workflow before signing? Yes / No

Proof of ID 1

Vendor Name	John Smith
Primary Id	Driver's License
Primary Id Type	License
Primary Id Number	123456
Date of Issue	Click to select date
Expiry Date	2021-09-11
Place of Issue	NSW
Original document sighted by	NP
Secondary Id	Medicare Card
Proof of billing	Water Rates
Proof of Legal Ownership	Current rate notice (up to 1 year old)

McGrath

The McGrath Sales Process

Creating an Agency Agreement

Via Sign

If you have multiple vendors, simply click on the 'Add proof of ID' in your bottom right corner above the submit button and follow the same steps for all vendors.

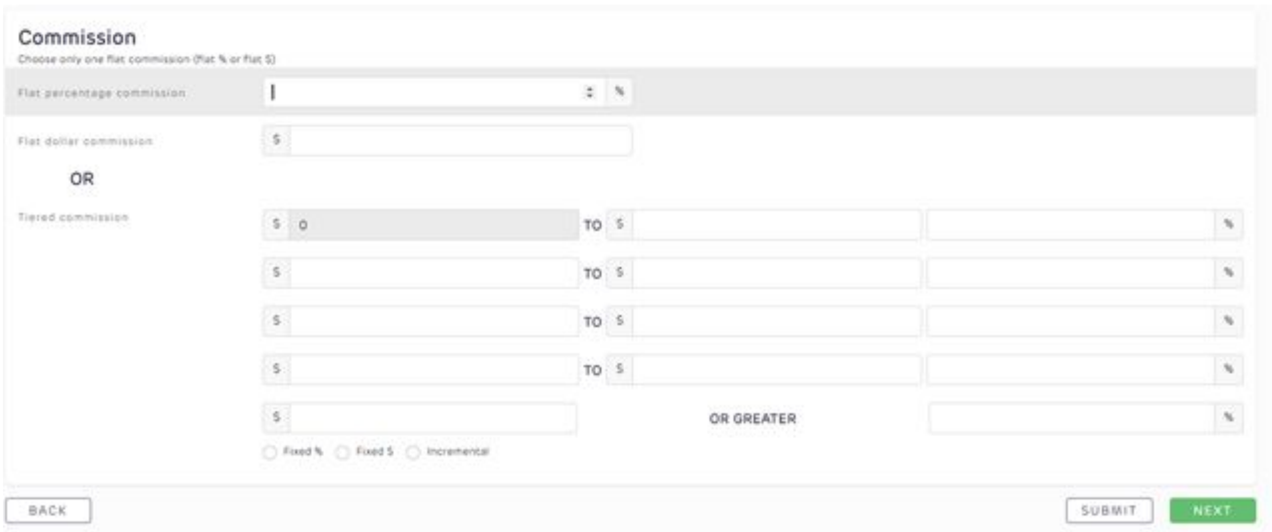
If you need to create an agreement and don't have these details from the vendor, simply add in their name to proceed onto the next step. You can then gather these details and come back to Sign and enter them in OR print the agreement and fill them in with the vendor in person.

If you leave this section blank and do not enter your vendor's name, you will see the below error when you finish your agreement. We require at least the vendor's name before being able to Sign electronically

Once you have resolved any issues, you'll be able to proceed with Signing. Just not verify in person workflow if you would like to upload a copy of the vendor's ID.

10. **Commission**

We've got three options, so we've got a Flat percentage, a Flat dollar, and then our Tiered commission



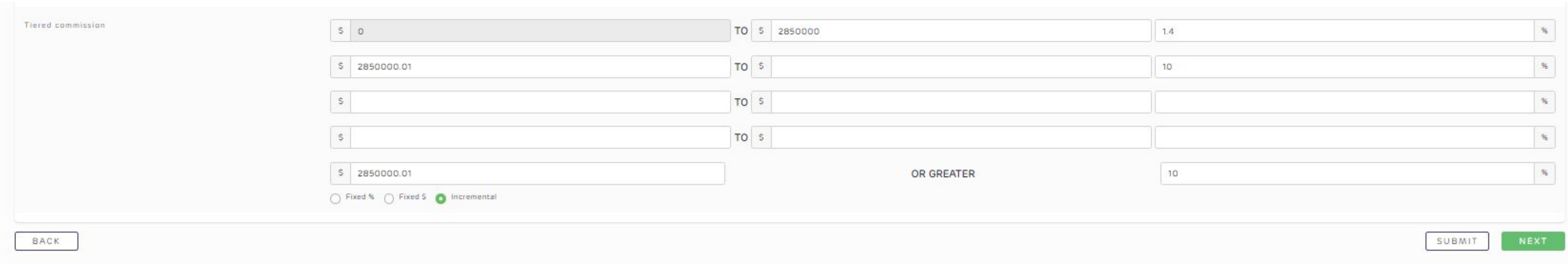
McGrath

Creating an Agency Agreement

Via Sign

Entering a Tiered Commission Structure (Incremental)

Below is how you can set up an incremental tiered commission structure in Sign:



This is what will spit out:

1. If the sale price on the contract ["Sale Price"] is between 0.00 and $ 2,850,000.00 the commission will be 1.40 % of the Sale Price.

2. If the Sale Price is greater than $ 2,850,000.01 the commission will be $ 39,900.00 plus 10.00 % of the price that the Sale Price exceeds $ 2,850,000.01 .

McGrath

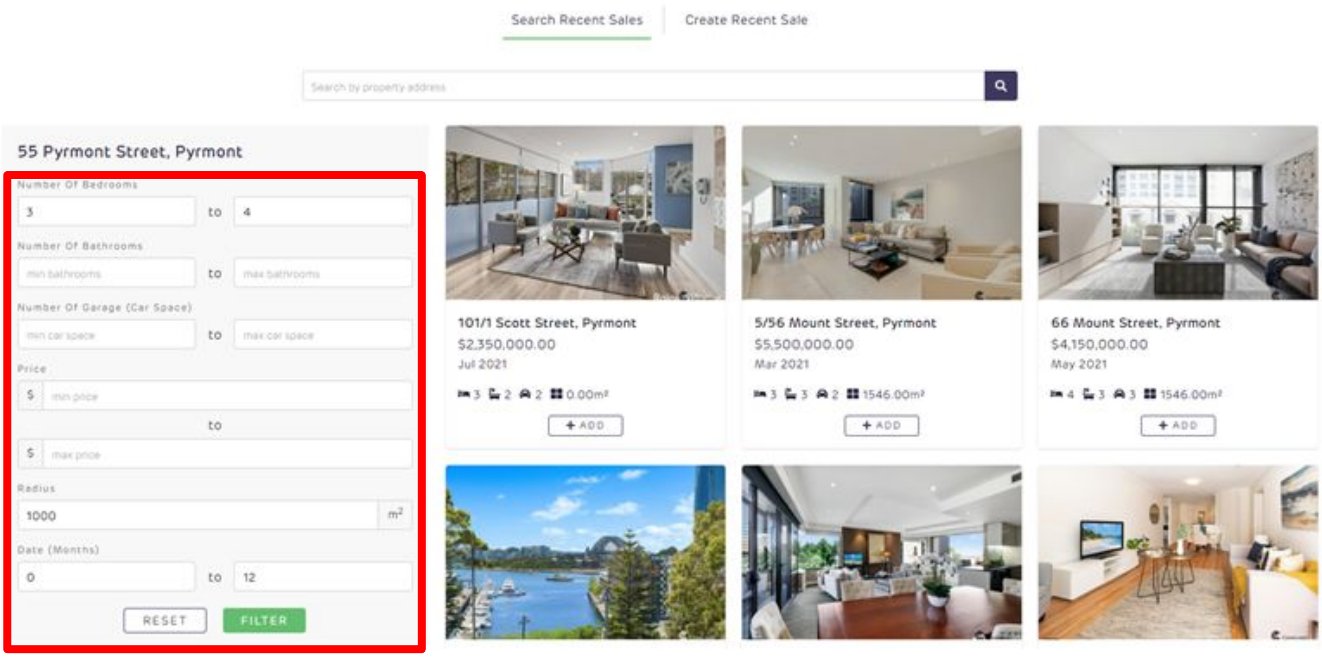
The McGrath Sales Process

Creating an Agency Agreement

Via Sign

11. **Comparable**

So here, just like Pitch, we have our filter bar, we've got Search by property and Create Recent Sale.



If it's not in the market property, you can create this recently sold property by entering all the details - address, bed, batch and car, price, sale date, and any other details.

McGrath

The McGrath Sales Process

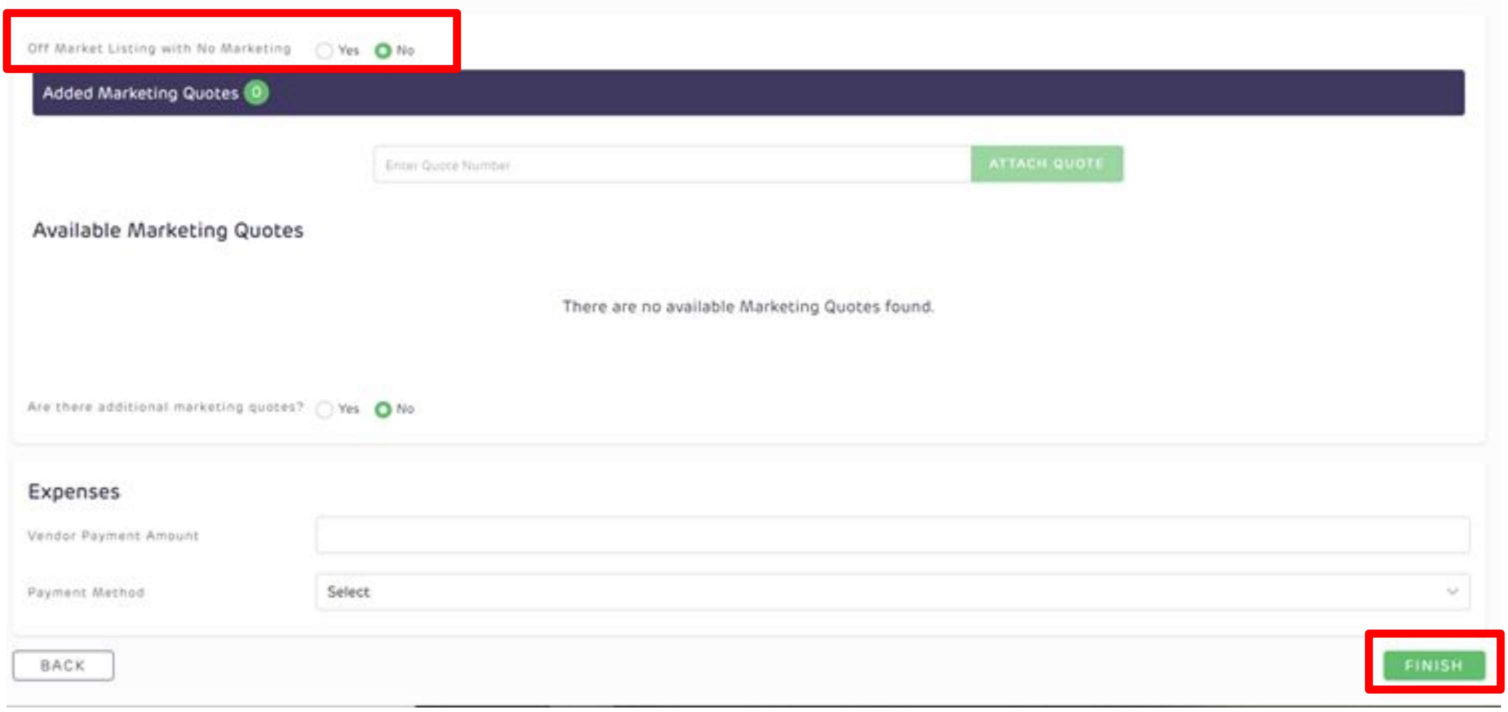
Creating an Agency Agreement

Via Sign

12. **Marketing**

- Is it an off-market listing with no marketing? Yes or No.
- Here we can enter your quote number and press Attach Quote.
- Is there additional marketing quote? If yes, you can upload document.
- Enter payment vendor amount.
- Select payment method.

13. Once completed, press **FINISH**.



The McGrath Sales Process

Creating an Agency Agreement

Via Sign

12. **Marketing**

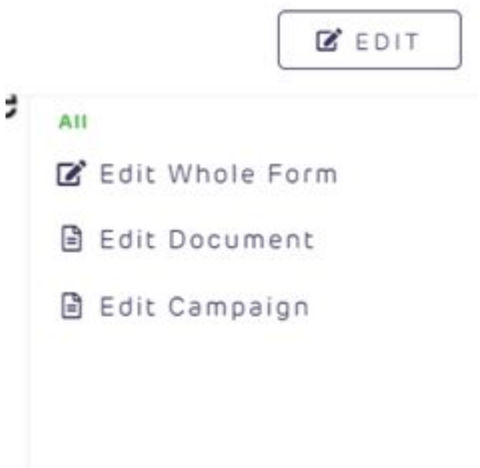
- Is it an off-market listing with no marketing? Yes or No.
- Here we can enter your quote number and press Attach Quote.
- Is there additional marketing quote? If yes, you can upload document.
- Enter payment vendor amount.
- Select payment method.
- Once completed, press **FINISH**.

13. **Completed Online Form**

Once you have finished, the Agency Agreement PDF will generate with all the information we have dropped in. A copy of the following will appear.

- Agency Agreement.
- Waiver of cooling off (if applicable)
- Marketing Quote.
- Consumer Guide.

On the top right-hand corner, you are able to edit Whole Form, Document or Campaign.



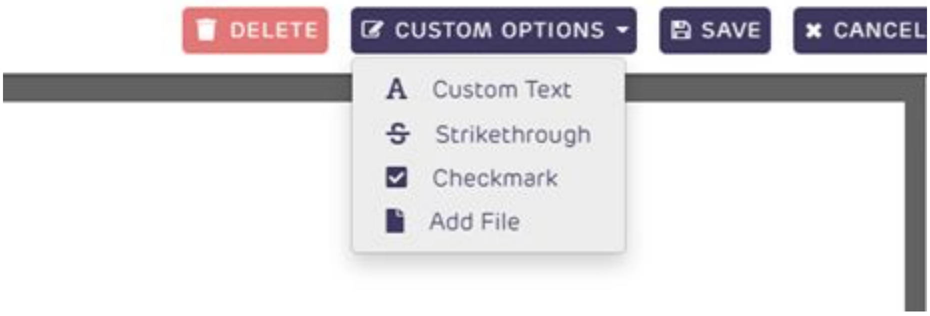
Creating an Agency Agreement

Via Sign

Edit Whole Form - This will take you back to editing the information on the Agency Agreement

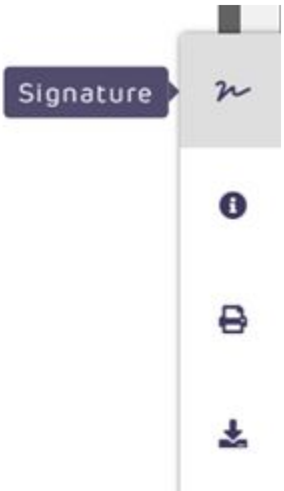
Edit Campaign - This has anything to do with the property address and property agents. Say, you need to amend property address 55A for example, you can do that through Edit Campaign.

Edit Document – If you click Custom Options you will be able to add Custom Text, Strikethrough, Checkmark, Add File



14. **Send for Signing**

Once your Agreement is all ready to send off to your vendors for signature request, simply click on the Signature icon on your bar on your right-hand corner.

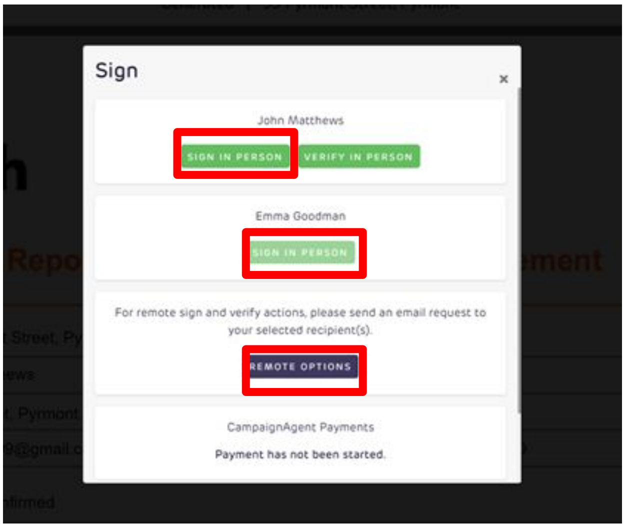


The McGrath Sales Process

Creating an Agency Agreement

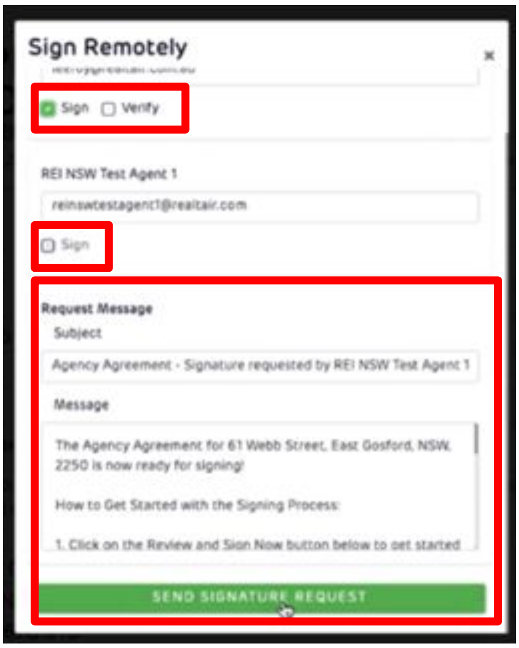
Via Sign

And then we have our two options. We can either **Sign in Person**, this is if you're with the vendor signing on an iPad or a laptop.



Or our **Remote Options** if we need to send the signature request off to our vendor via Email, simply click on that Signature Request button.

Below we have our standard Request Message. Just note all the subject and message is editable, however in the message we do have a signing instruction for the vendor.



McGrath

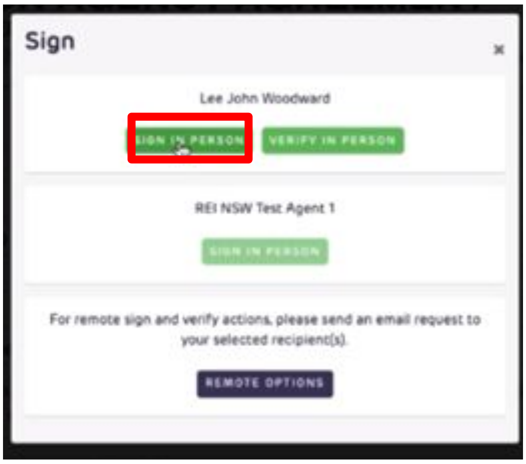
The McGrath Sales Process

Creating an Agency Agreement

Via Sign

<u>Sign in Person</u>

1. In this example, here is the **Sign In Person** workflow. This is the same workflow the vendor will follow in the Sign Remotely section.



2. Before signing, every receiver must consent to sign electronically by clicking the "Agree" button.

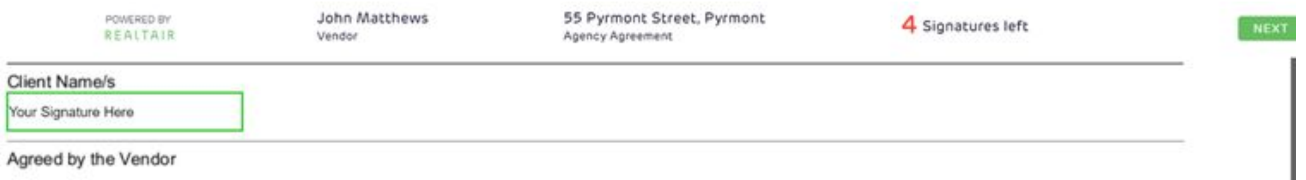
3. Then what we want to do is draw their attention to the top right corner where we have our signature left and to click that Start button.

The McGrath Sales Process

Creating an Agency Agreement

Via Sign

4. Once they click that Start button, it will take them to re-click where they need to sign first.



5. Simply click on the Sign textbox and then we have our two options. We can either Draw Signature or Type In (this will default the vendor's name)

McGrath

The McGrath Sales Process

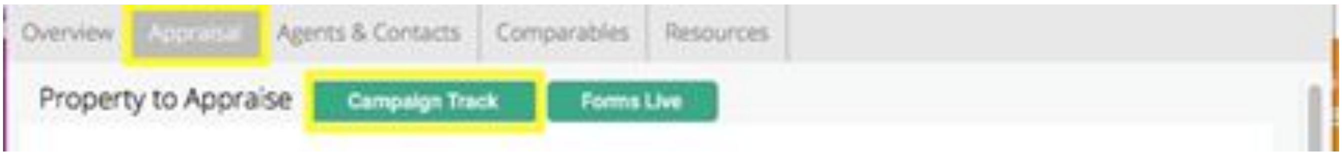
Accessing Campaign Track

Via Agentbox

Please note to create an marketing quote you need to save the listing as an appraisal in Agentbox

1. Go into the property you wish to access via Agentbox.

2. If the property is still an appraisal, under the appraisal tab, there will be a green button labelled "Campaign Track"



3. If the property is listed (approval pending) or Available, you will find the green CT button under the general tab.

4. Click into it assuring the Account is under the correct office and tick override on both boxes.

5. Click Export

McGrath

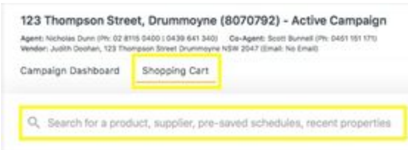
The McGrath Sales Process

Creating a Marketing Quote

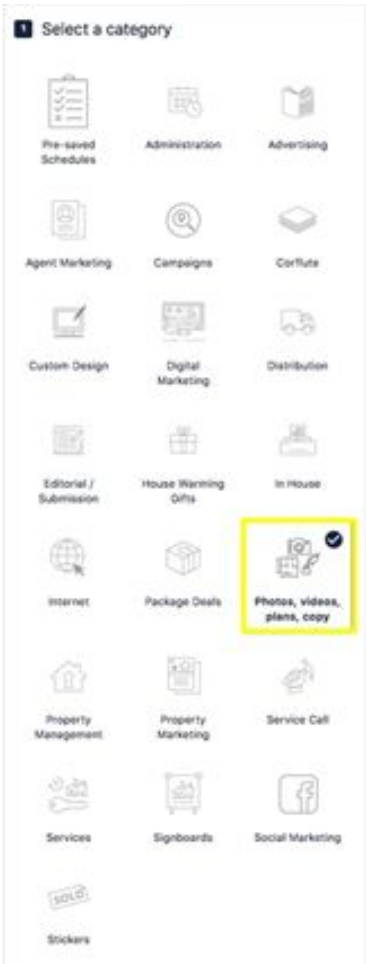
Via Campaign Track

Please note to create an marketing quote you need to save the listing as an appraisal in Agentbox

1. Once in CT, click onto the Shopping Cart Tab.



2. From here you can add what your agent would like in their campaign to the quote. You can either search in the top search bar for a specific item, or you can go through the categories on the left and add to your quote.

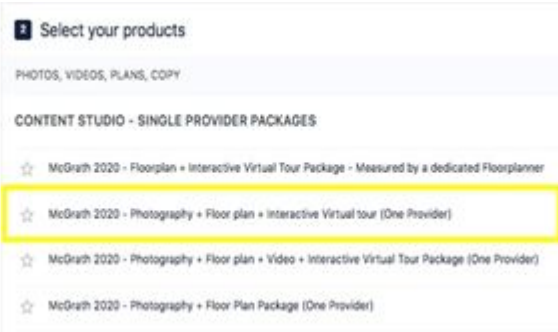


The McGrath Sales Process

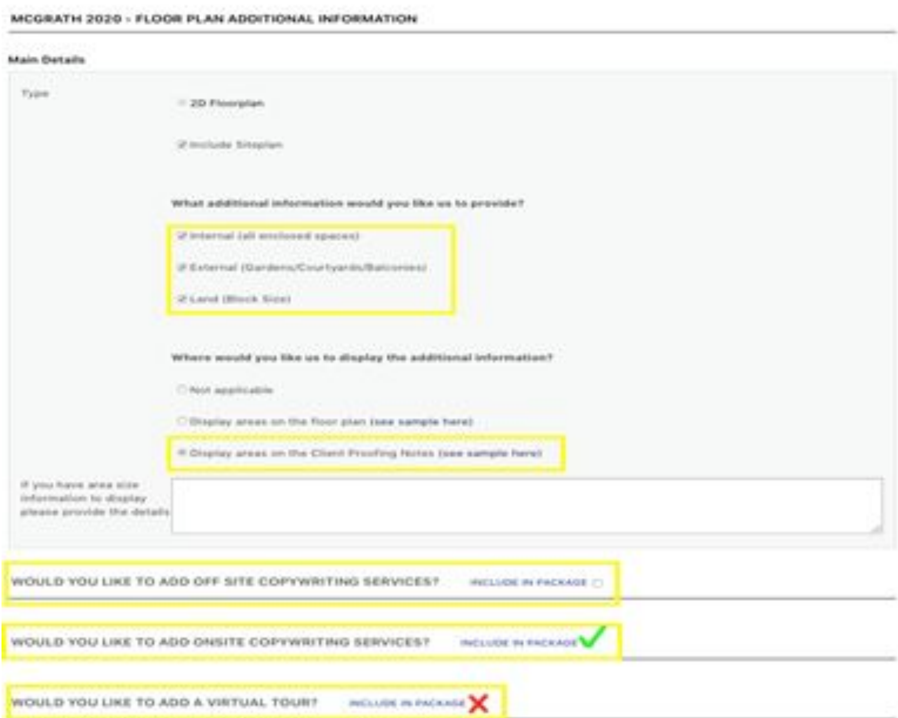
Creating a Marketing Quote

Via Campaign Track

3. To add Photos/Copy/Floorplan, we have a package deal that works out cheaper than putting them in on their own. Click into "Photos, Videos, Photo, Copy". And Click into the second option (highlighted below)



4. Select how many Photos your agent wants and how many bedrooms in the property. Scroll down and select the options pictured below, ensuring either On site or Off Site Copy is ticked, and untick the virtual tour option.



McGrath

The McGrath Sales Process

Creating a Marketing Quote

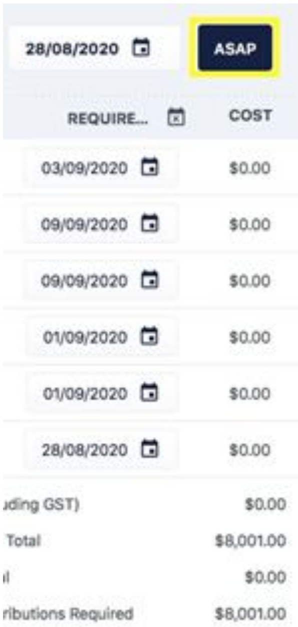
Via Campaign Track

5. Keep in mind, when you are adding the Domain internet package, there are three bands to choose from.

1. Lower band: $0 - $900,000
2. Middle Band: $900,000 - $2,500,000
3. Upper Band: $2,500,000 +

6. Continue to add whatever your agent would like in their quote. Once you have completed adding everything into your cart, scroll down and on the right-hand side of your screen click Print Quote.

7. A screen will appear and will prompt you to select the dates you wish, just click the ASAP button on the top.



8. Print Quote.

McGrath

The McGrath Sales Process

Creating your Pitch Presentation

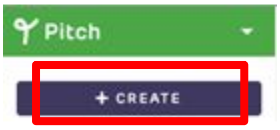
Via Realtair

Please note to create an marketing quote you need to save the listing as an appraisal in Agentbox

<u>Create a Pre-List Presentation</u>

1. Login into Realtair to get started on your price update.

2. On the left-hand side, click on the create button

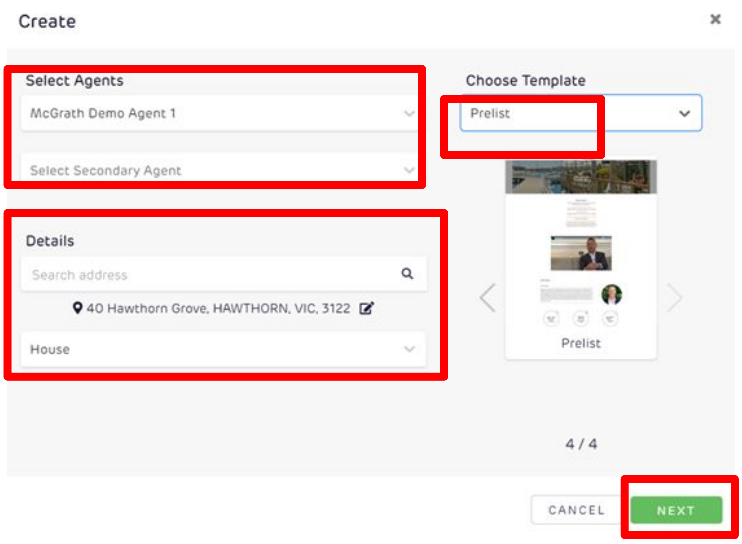


3. Choose your agent & secondary agent if applicable

4. Choose your template, in this instance select pre-list

5. Search your property address

6. Select a property type, then click next.



McGrath

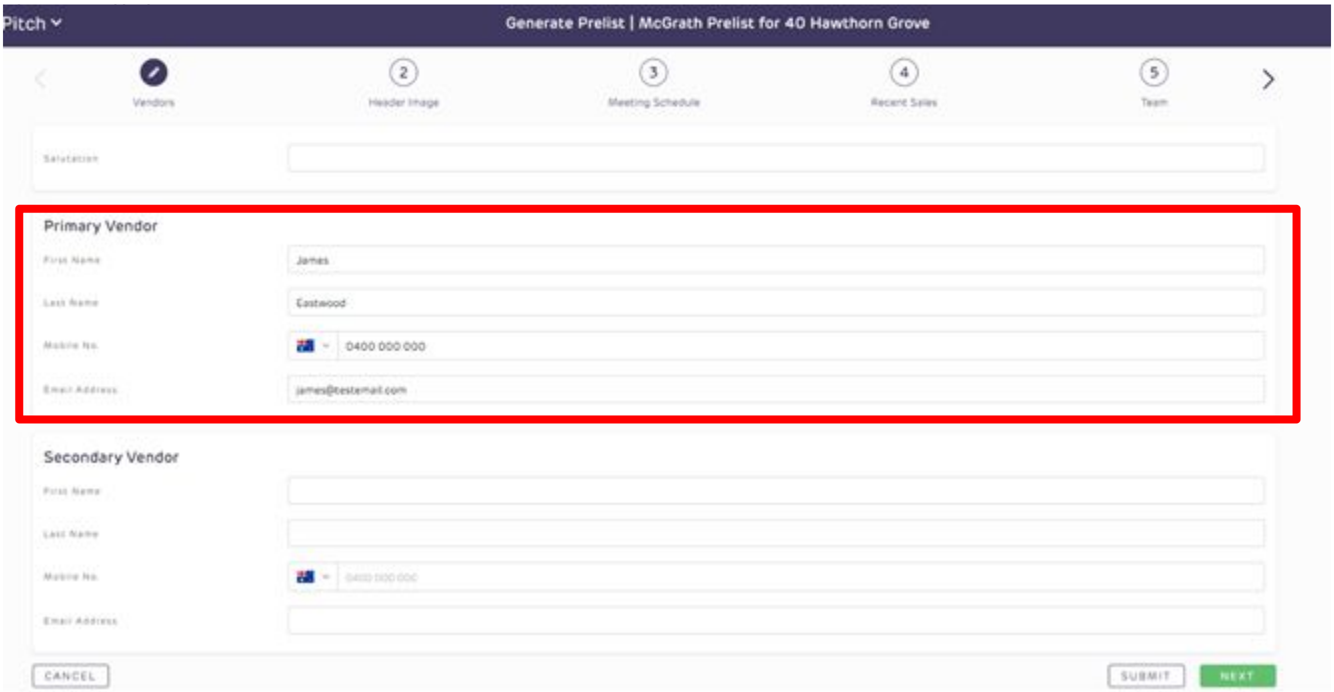
The McGrath Sales Process

Creating your Pitch Presentation

Create a Pre-List Presentation

Via Realtair

7. On the next page fill in all the vendors information if it's not already in there, we need both a mobile & email for at least 1 vendor or else you won't be able to save the pitch. Icne



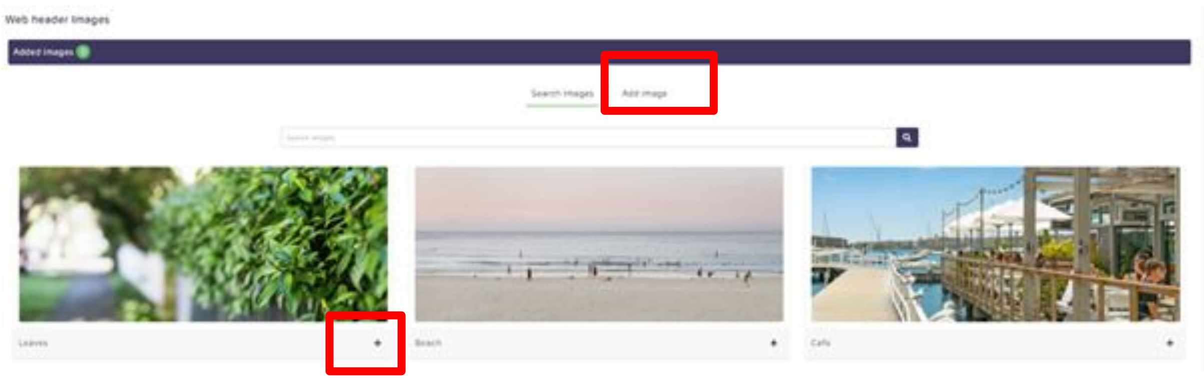
The McGrath Sales Process

Creating your Pitch Presentation

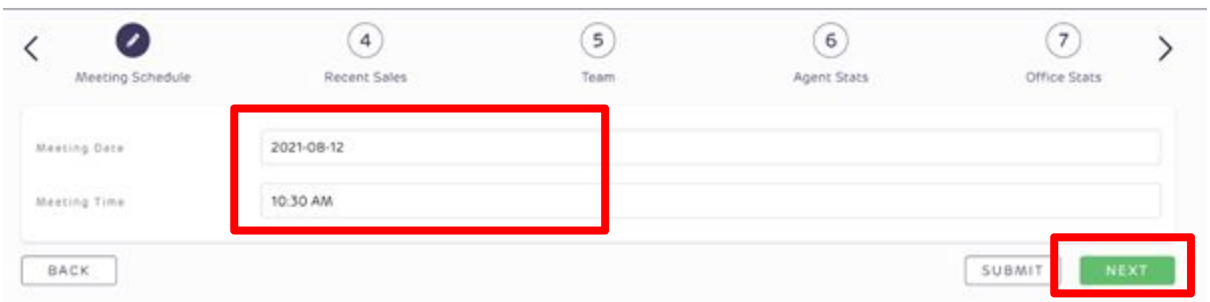
Create a Pre-List Presentation

Via Realtair

8 .The next step will be to select the image you want to use for your price update, select the image you want by clicking on the + button located at the bottom of the image. You can also upload your own image by selecting add image. Once done, scroll down and click next.



9. The next step is to set up a meeting date & select a time, once done click next.



The McGrath Sales Process

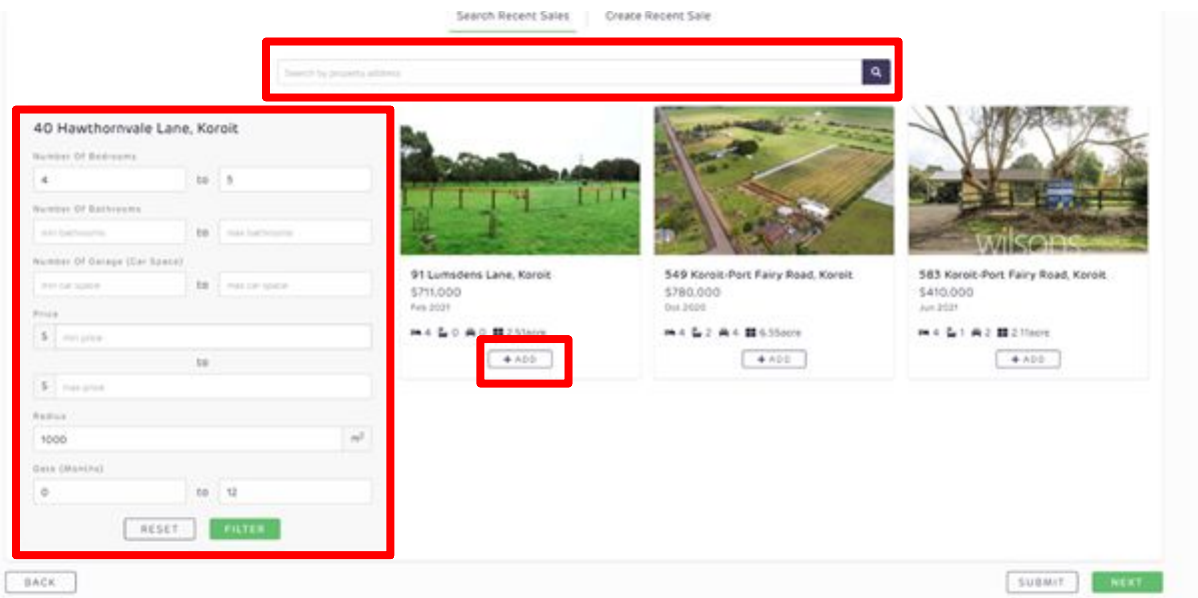
Creating your Pitch Presentation

<u>Create a Pre-List Presentation</u>

Via Realtair

10. You will then be directed to the next page where you choose your comparable/ recent sales. You can search your address in the top bar, or you can filter your search on the left.

- If you cannot find the sale, you also have the option of creating a recent sale (*see how to create a recent/comparable sale)
-
- Click add once you find the property you want to add, you can also remove the property by pressing 'remove'



McGrath

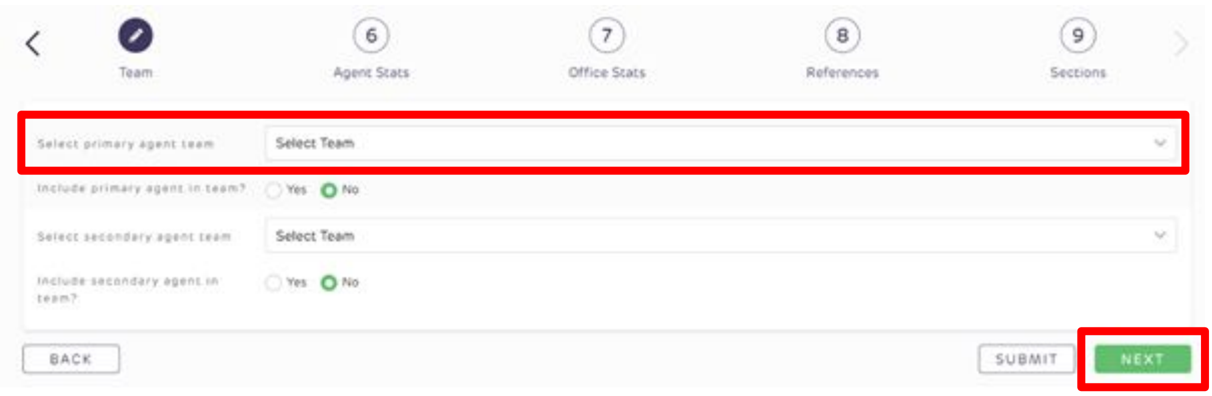
The McGrath Sales Process

Creating your Pitch Presentation

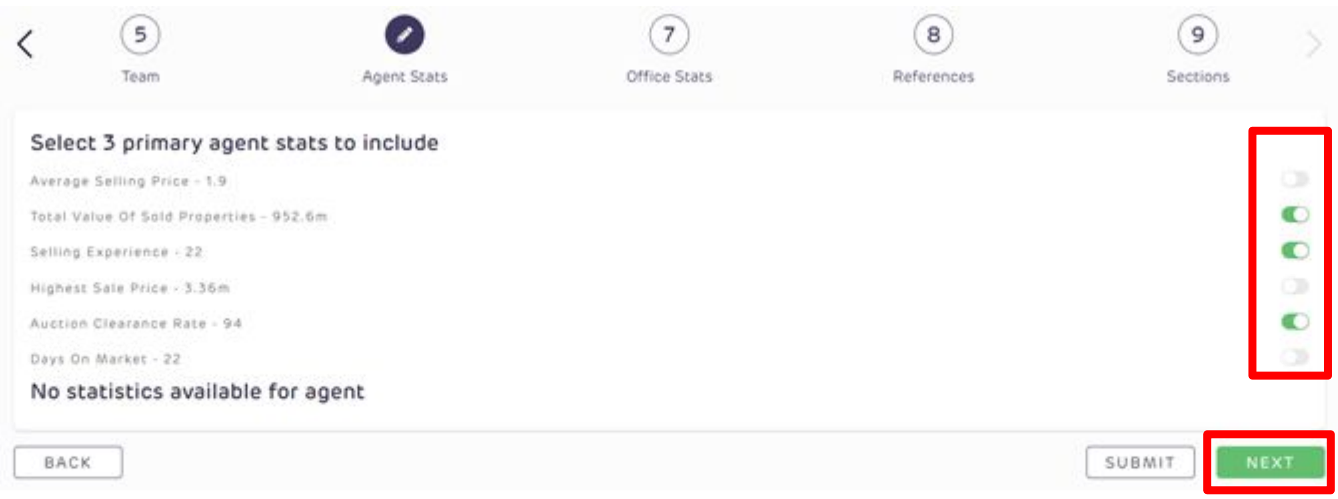
Create a Pre-List Presentation

Via Realtair

11. You will then be asked to select the team or the agent, if none then just press next



12. Next would be to select your agent stats (if they have been set up), you can select any 3 of the 6 available..



McGrath

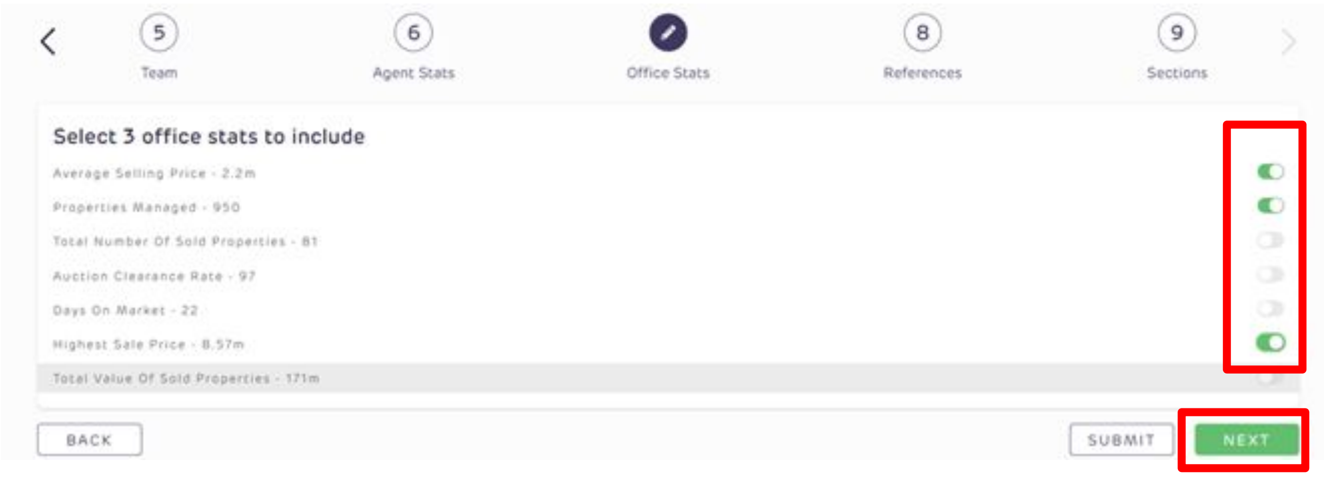
The McGrath Sales Process

Creating your Pitch Presentation

Create a Pre-List Presentation

Via Realtair

12. You will then be asked to select the team or the agent, if none then just press next



13. After the office stats section you'll be able to add in references, if you don't wish to add any, just skip this part and click next.

14. Lastly, you can select various sections to includes, usually all of these remain ticked, however you are able to remove what you don't want. Once done click on Finished.

15. Once you've finished your pre-list it will take you to the final product, this allows you to have a look through the pre-list to check that it's all ready to go. This is also the section where you can change/fix up anything you want using the below links:

- **EDIT ICON** (top right): This button allows you to make changes to your proposal. To edit your campaign, select edit whole form and you can change what you need to.
- **EYE ICON**: Press this to view a preview of your presentation
- **LINK ICON:** Press this to get the link for your presentation to send to vendor/s
- **SMS ICON**: Press to send proposal via Text
- **DOWNLOAD ICON**: Press to download as a PDF

The McGrath Sales Process

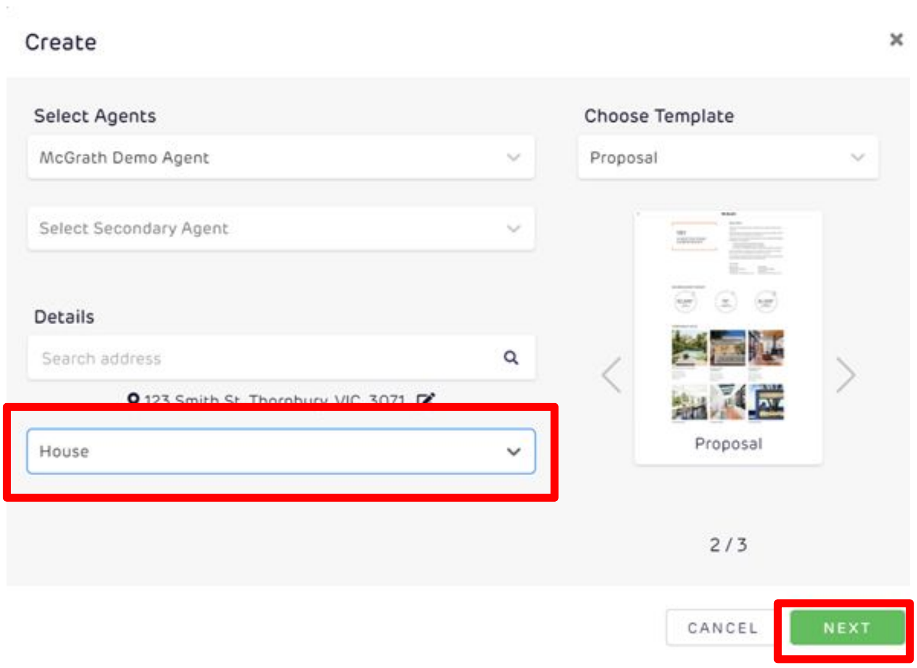
Creating your Pitch Presentation

<u>Create a Full Proposal</u>

Via Realtair

1. Create your property in Agent Box
2. Login into Realtair to get started on your price update.
3. On the left-hand side, click on the create button

4. Choose your agent & secondary agent if applicable
5. Choose your template, in this ... e-list
6. Search your property address
7. Select the property type, then click next.



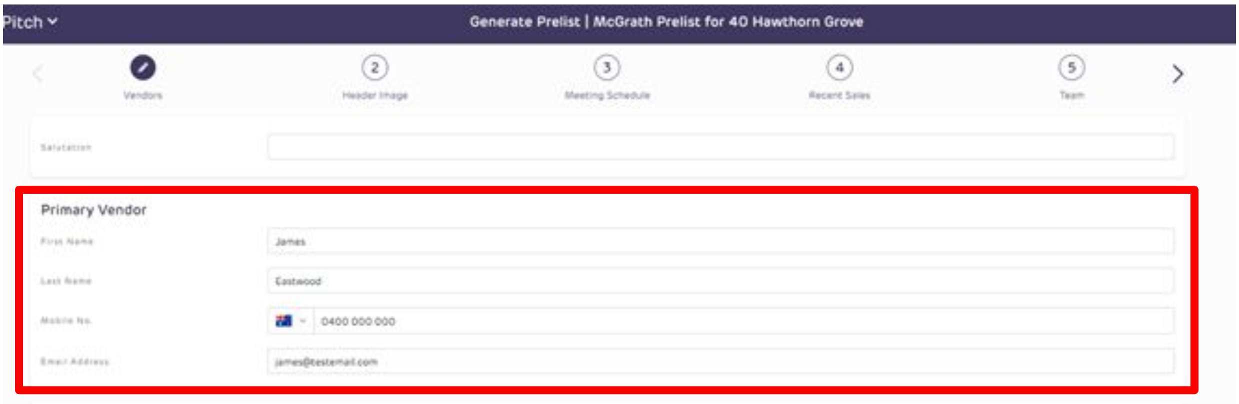
The McGrath Sales Process

Creating your Pitch Presentation

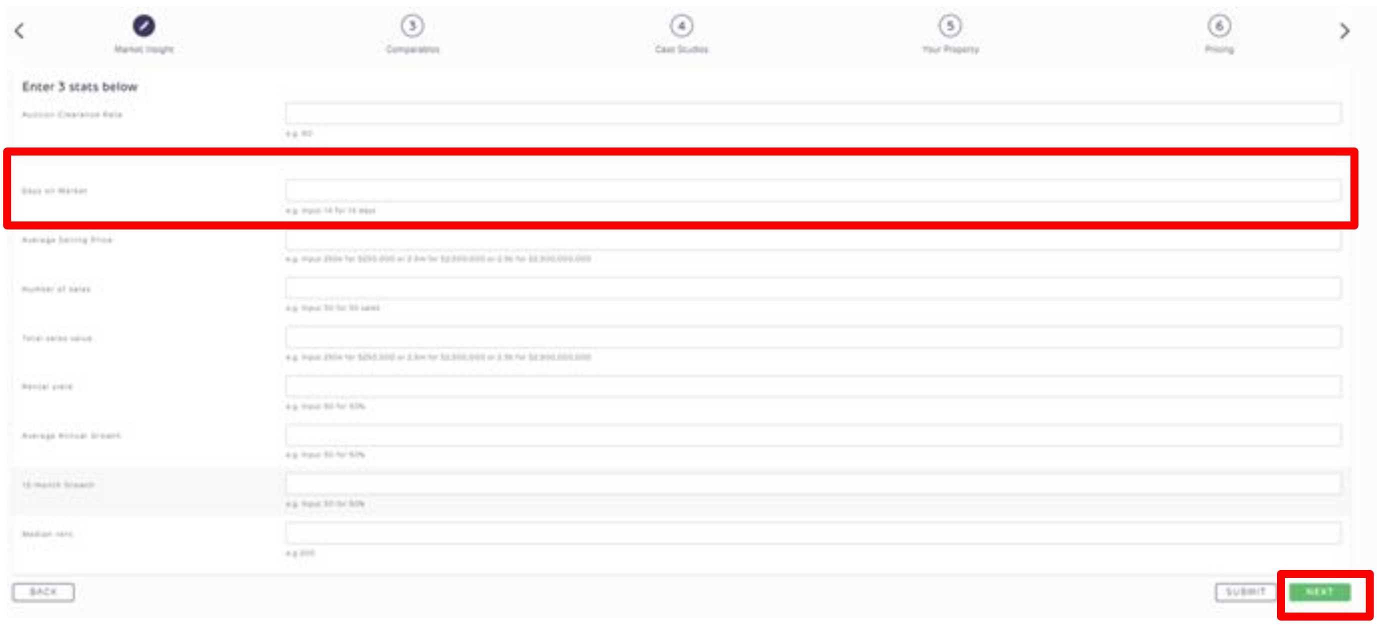
Create a Full Proposal

Via Realtair

8. On the next page fill in all the vendors information if it's not already in there, we need both a mobile & email for at least 1 vendor or else you won't be able to save the pitch. Once done, click next.



9. After you add in the vendor, you'll then be asked to add in market insights, if you have any this is where you can add it in, if none then just click next.



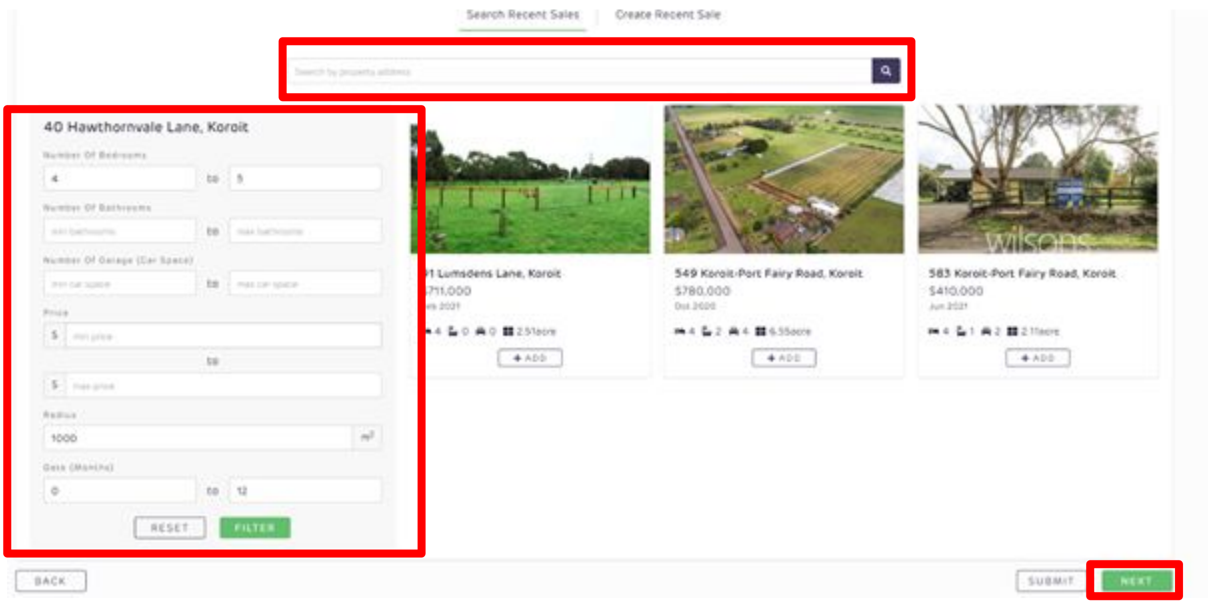
The McGrath Sales Process

Creating your Pitch Presentation

<u>Create a Full Proposal</u>

Via Realtair

10. You will then be directed to the next page where you choose your comparable/ recent sales. You can search your address in the top bar, or you can filter your search on the left.
11. If you cannot find the sale, you also have the option of creating a recent sale (*see how to create a recent/comparable sale)
12. Click add once you find the property you want to add, you can also remove the property by pressing 'remove'



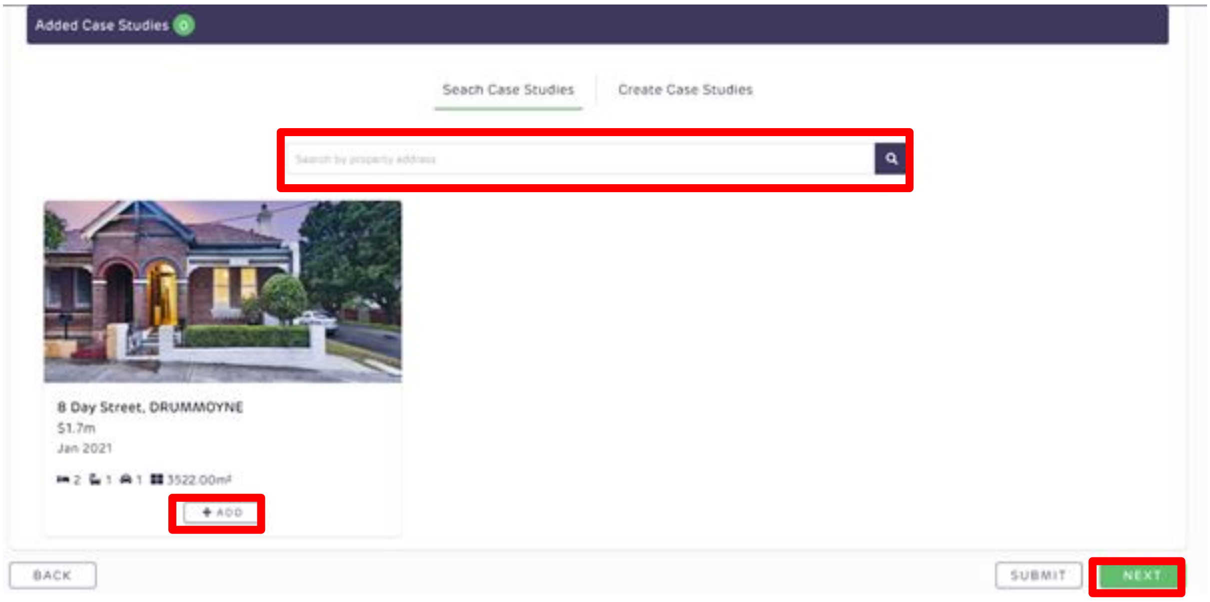
13. Next, you can add in case studies, you can create the case study and add in as much or as little information as you want.
14. You can either search a case study you have previously created, or you can create a new one.

The McGrath Sales Process

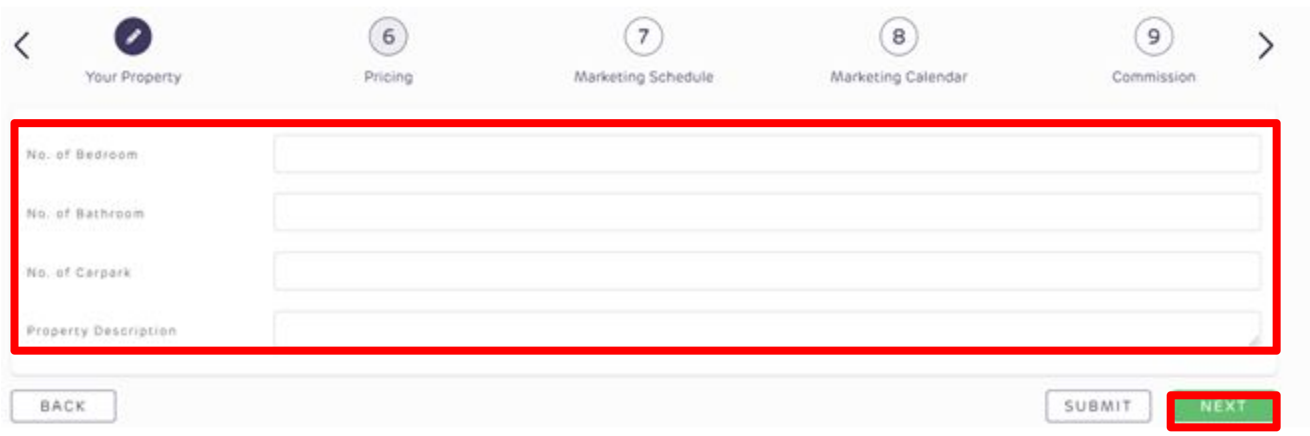
Creating your Pitch Presentation

Create a Full Proposal

Via Realtair



13. After you've added or created your case study you can add in details about the property you are appraising.



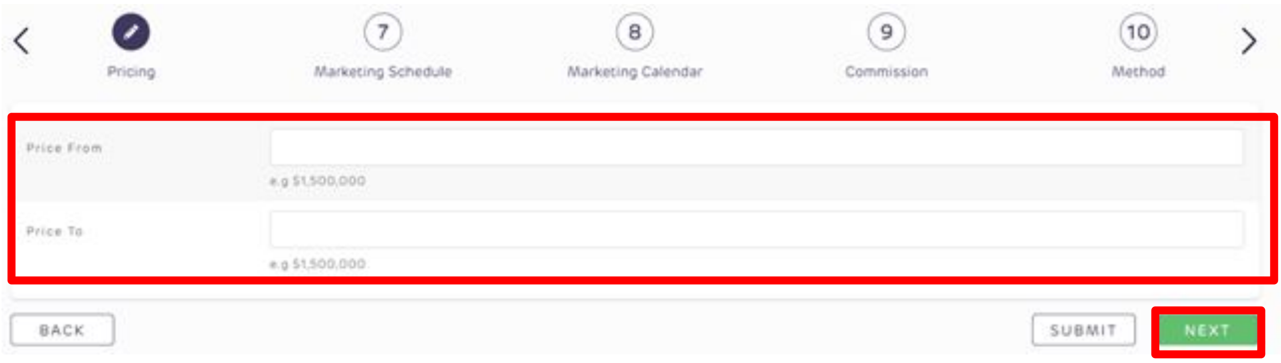
McGrath

Creating your Pitch Presentation

Create a Full Proposal

Via Realtair

14. Next you can add in your pricing details

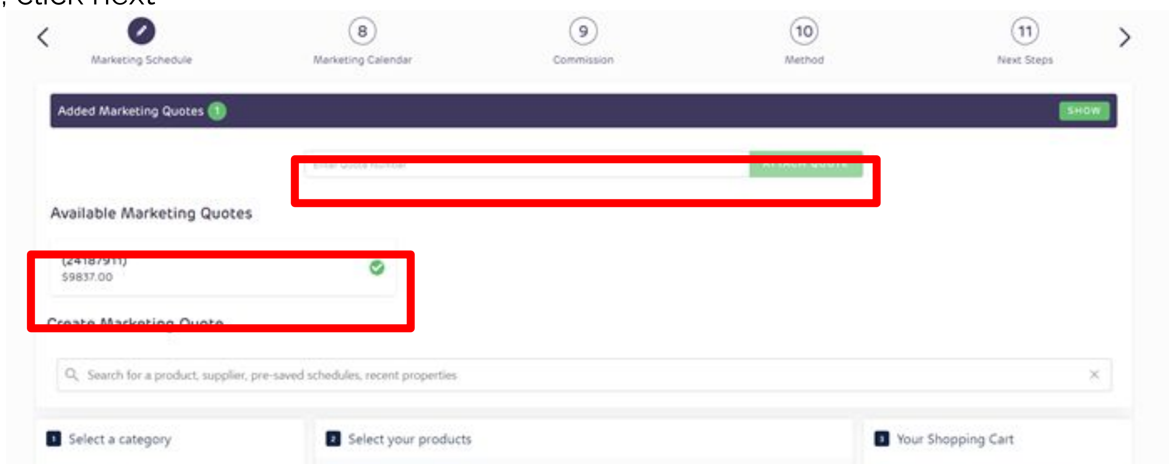


Adding your Marketing Quote/Calendar to your Proposal/Pitch Presentation

Via Realtair

Note: It is easiest to create the quote in CT before adding it into your Pitch Presentation. Also, to create a marketing quote you first need to save the listing in Agentbox.

15. Once the quote has been done in CT you can copy the quote number and paste it into the highlighted section and add in your quote (don't create your quote in pitch). Once done, click next

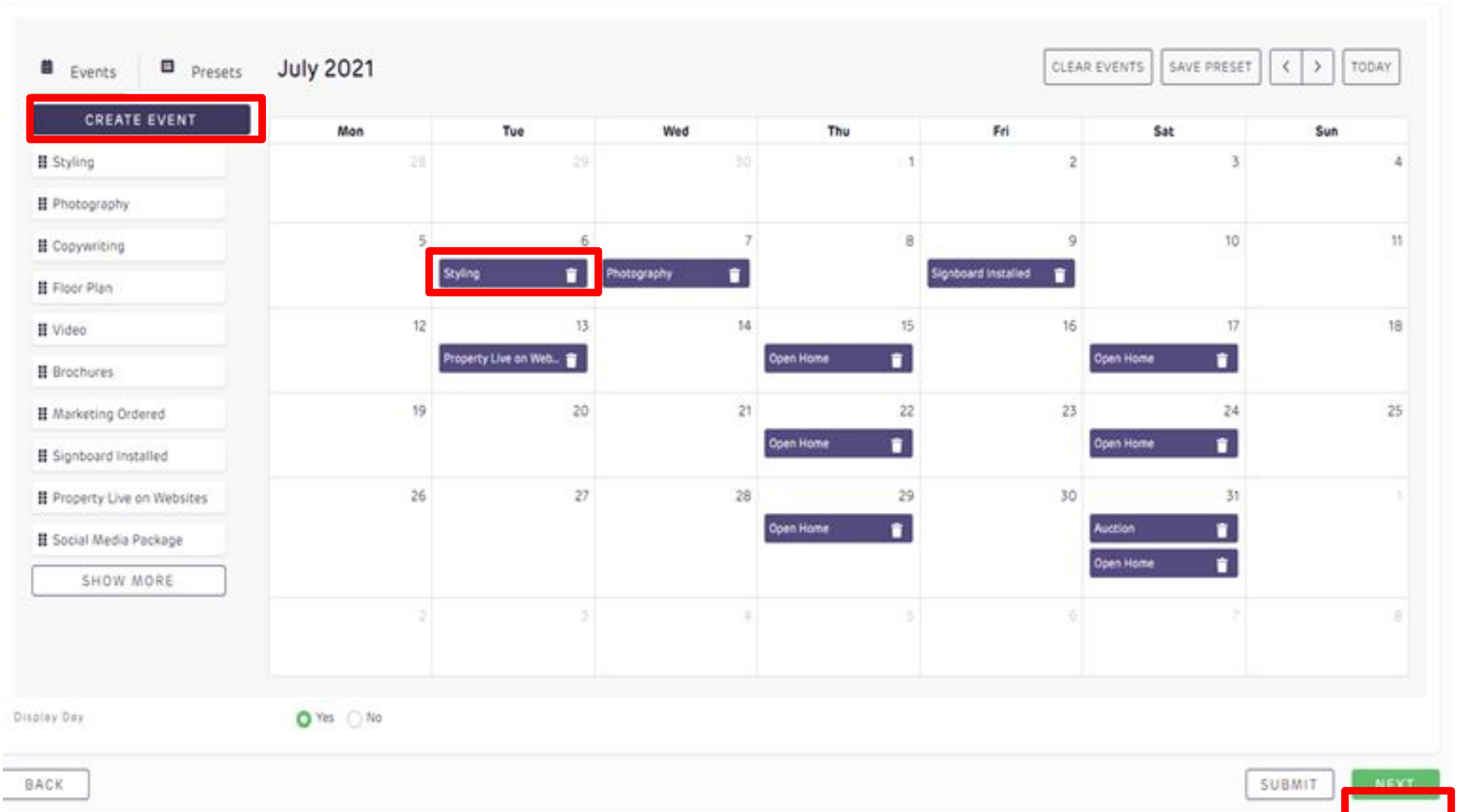


The McGrath Sales Process

Adding your Marketing Quote/Calendar to your Proposal/Pitch Presentation

Via Realtair

16. After the quote, you can create a marketing calendar, you can drag options from the left-hand side and add them to the dates you want.



Completing your Full Proposal

17. Once you've clicked next you can add in your commission scale, click next again.

18. Select your method of sale and click next.

19. Next you can add in any recommended 'Next Steps' for your vendor if applicable.

20. Next, you can add any references which would be past clients who may be phoned for a review, reference or testimonial..

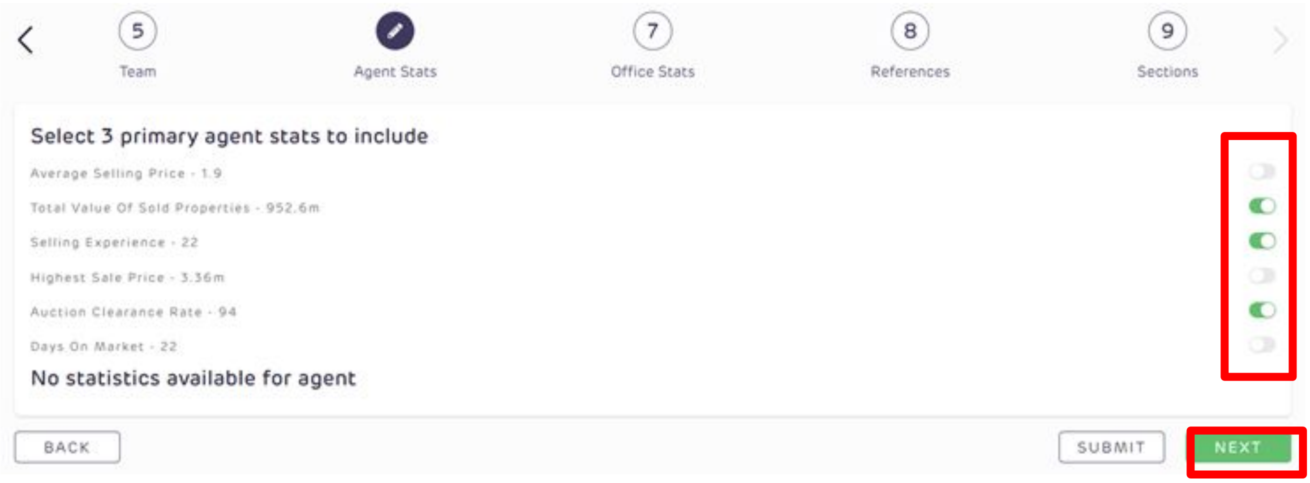
21. Next you can toggle on or off the various statistics you want to include in your presentation..

The McGrath Sales Process

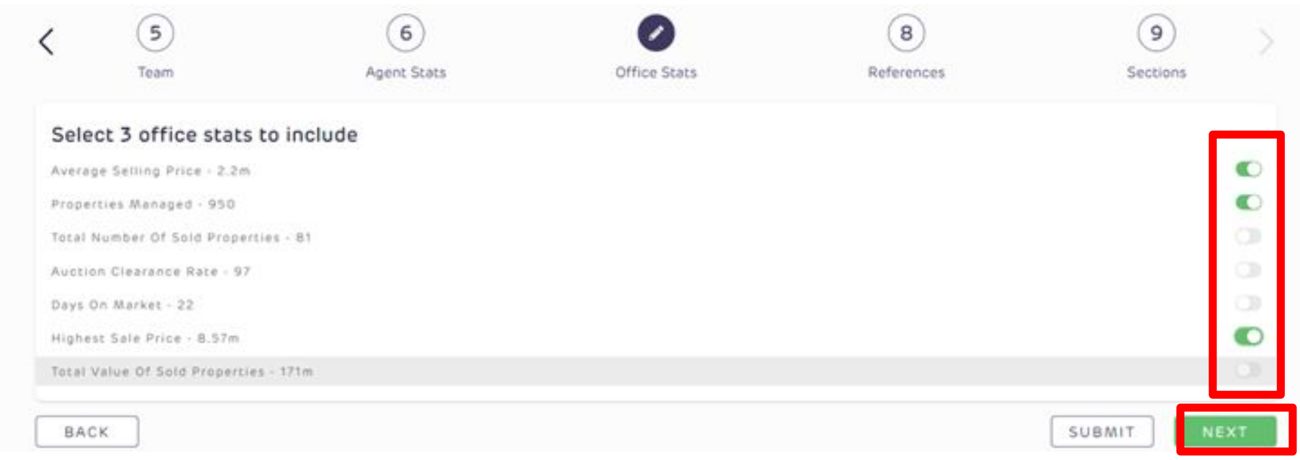
Completing your Full Proposal

Via Realtair

22. Next would be to select your agent stats (if they have been set up), you can select any 3 of the 6 available.



23. Once you click next you can select the office stats (if they have been set up), again you can choose any 3 stats to display. Click next.



24. Finally, you will be asked to select the team or the agent, if none, then just click 'Finish'.

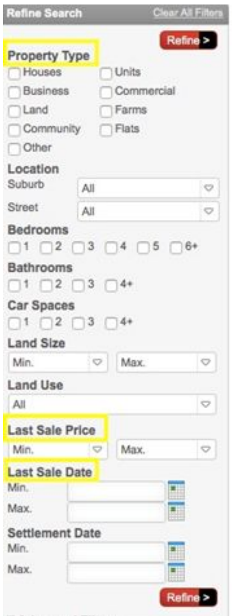
McGrath

The McGrath Sales Process

Finding Comparable Sales

Via RP Data

1. Log in to your RP Data account.
2. In the Search bar search up the suburb of the property you are researching
3. On the left-hand side of your screen, there will be a grey “Refine Search” section. (pictured below)



4. Select the property type (apartment, house etc.)
5. Under the “Last Sale Price” section, put in the range that is in the agency agreement for the property you are dealing with
6. Under “Last Sale Date”, use the last 6 months as the date range
7. Click Refine
8. Once new page is loaded select the comparables you wish to use by ticking the box. (Minimum 3)
9. Then, scroll down to the bottom and click “Property List report”
10. This will then prompt you to generate a PDF and then save that onto your desktop and then into agentbox in Resources - Documents section

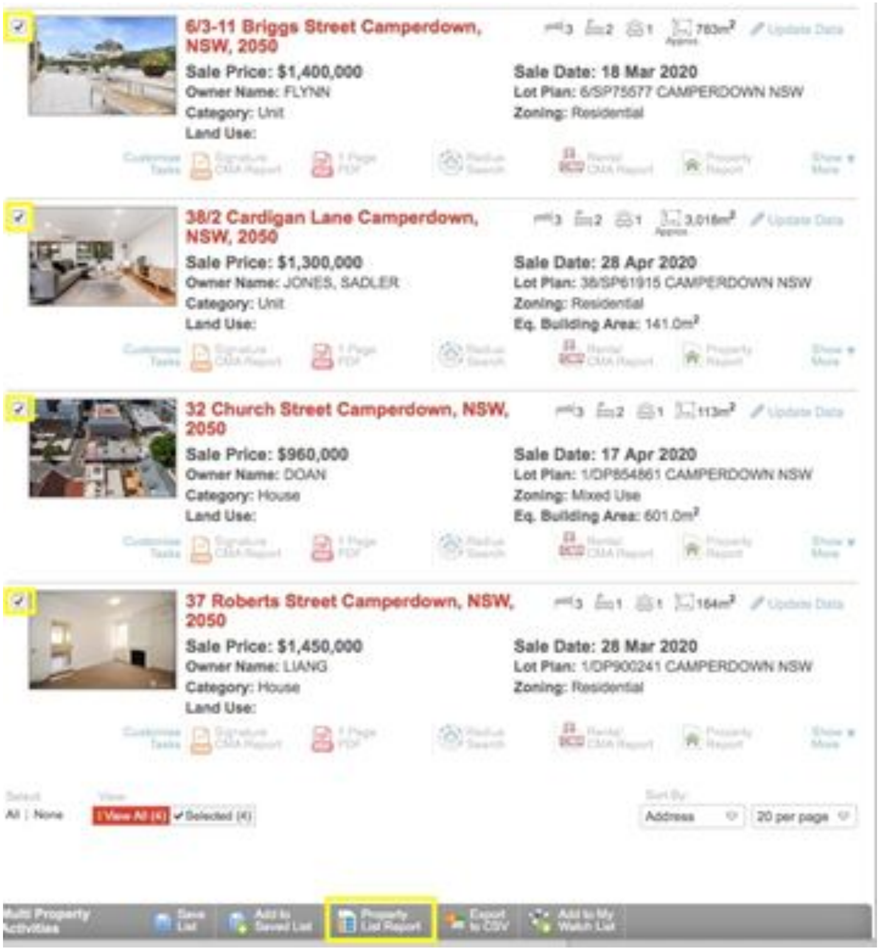
McGrath

The McGrath Sales Process

Finding Comparable Sales

Via RP Data

11. Once new page is loaded select the comparables you wish to use by ticking the box. (Minimum 3)
12. Then, scroll down to the bottom and click "Property List report"
13. This will then prompt you to generate a PDF and then save that onto your desktop and then into agentbox in Resources - Documents section



McGrath

The McGrath Sales Process

Activating your Marketing Elements

Via CampaignTrack

Checking on Marketing Monies

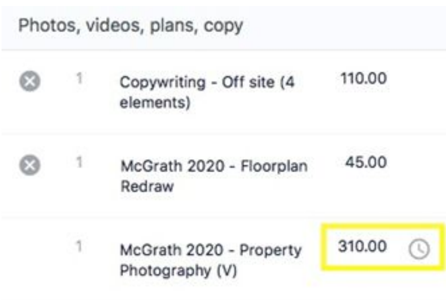
In order to activate your marketing quote, you will need proof of payment before any elements can be ordered.

You can do this by emailing your CC to confirm all is fine to move forward with the listing.

Checking SWAT Availabilities

To book in your Photos, Copy, Floorplan, videos, etc. You will need to reference the contractor's availabilities.

1. Go into the Shopping Cart section of the quote in CT.
2. Scroll down the right-hand side into the quote to the "Photos, videos, plans, copy" section.
3. Next to the Photography section click on the little clock on the right-hand side.



McGrath

The McGrath Sales Process

Converting a Prospect or Appraisal to a Listing

Once a vendor has agreed to list with us, we will need to convert our prospect or appraisal to a listing in Agentbox so that we can prepare it for marketing.

We cannot convert the property to a listing unless there is a signed agency agreement by the vendor. In the Resources section, insert the Signed Agency under Documents -> Agency Agreement Upload.

*Note: if you have attached the 'Prospective Vendor' to the prospect property, when converted to a listing the contact will automatically be assigned as the 'Vendor'. This will also automatically update the contact with the new contact class, however, will not remove the previous status.

1. Click **Listings** from the Universal Search Bar at the top of the screen

2. Enter **Listing ID, Street Number, Name** or **Suburb Name**

3. A list of Appraisals will appear in a drop-down.. Click the **Appraisal Property** to open the property card

McGrath

The McGrath Sales Process

Converting a Prospect or Appraisal to a Listing

5. Select the new status from the drop-down menu

- **Listing Presentation** - This status has the same functionality and look of an appraisal however is an additional search category for properties that you have gone out and presented to (presentation date must be entered for reporting).
- **Convert to Listing** - This will convert the appraisal to an Offline Listing with the Status - Offline - Not ready for Public Display. You will then need to add all the relevant information to change the property to Available/On Market **(Listing Date/Agency Agreement date must be entered for reporting)** - this info can be found on the signed Agency Agreement.
- **Cancelled/Missed** - This marks the property as Offline with the reason - cancelled/missed appraisal (with the option to differentiate between cancelled [Vendor not selling, etc] and missed [lost to another agency, etc]. You can use an advanced contact search to find these properties and will be reflected in appraisal reports.
- **Archived** - This marks the property as Archived and you can enter a reason. This will remove the appraisal from all reporting and can only be found via an advanced property search.

6. Click **Save**, and the property card will reload in it's new status.

The McGrath Sales Process

Preparing your listing for the web

As a rule of thumb, try to fill in as much information as possible and work your way across all of the tabs at the top of the listing card.

1. Complete the '**General**' tab:

Status: - Will default as offline - not ready for public display. You will need to upload all resources before changing the status to available

For Sale/Rental: - Always select For Sale

Type: * - Always select. Residential.

Category: * - Select category based on your type e.g. House/Apartment/etc.

New Property Development:- Domain portal only - For new developments only

Hidden Listing: - **ALWAYS TICK THIS**. When ticked, the listing is hidden from the McGrath website and automated property alerts,. This allows you to change the status to Available so you can communicate the listing via e-newsletter however will hide the listing from your website/media until unticked.

Investment: - This is for internal reference only on sale properties

Sale Method: - If a sale property, you will need to specify the sales method e.g. Auction. Once selected you will be able to enter additional information for this method e.g. dates, times, location etc. **You will then need to book in the Auction separately via email. There is a template saved in Agentbox to do so (next slide).**

Property Name: - Enter the name of the property if applicable

Municipality: - N/A

Level No.: Unit No.: Street No.: - All address fields are to be entered separately. You can change the display of the address or hide from public display later.

Fill rest of fields as necessary.

Key to Property?: (If ticked enter Key No). - Internal reference only

Access Details.: - Internal reference only

2. Save & Proceed. This will take you to the next tab.

McGrath

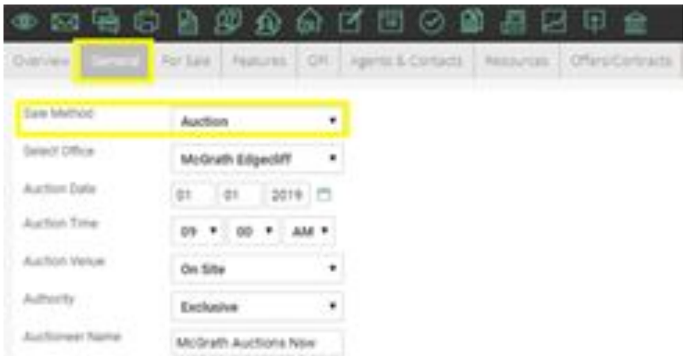
The McGrath Sales Process

Preparing your listing for the web

<u>Booking Your Auction via Agentbox</u>

Before we complete the next **'For Sale'** tab, you will need to book the auction with our Auctions Team. It is very simple to do this via Agentbox.

1. Go into the listing in Agentbox.
2. In the General Tab, Click the Drop-down box for Sale Method. Click Auction.
3. Double check the correct office is showing. Enter the auction time and date.
4. Leave **Auction Venue** and **Authority** as displayed. **note, during COVID, Auction Online should be selected



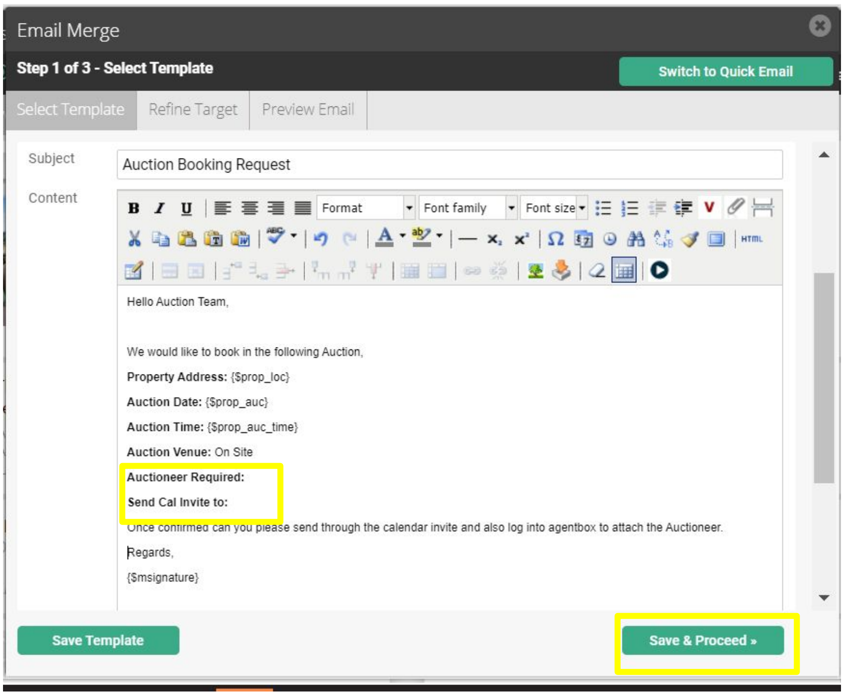
5. Under "Auctioneer Name" always insert "McGrath Auctions" – regardless if the agent asks for a specific auctioneer, as our Auctions team will book them for you.
6. Click Save
7. On the top menu bar, select the Email icon (second to the left) and click "Email Merge/Template" to send an email to the Auctions team to confirm your auction

The McGrath Sales Process

Preparing your listing for the web

<u>Booking Your Auction via Agentbox</u>

8. On the “Select a Template” Drop-down menu, scroll down and select “Listing | Auction Booking Request”
9. On the “Recipient Contact Role” Drop-down menu, select Auctioneer.
10. In the body of the email leave all information as is. Next to “Auctioneer Required” insert the agents preferred auctioneer’s name. Next to “Send Cal Invite” insert the names of both the agent and the auctioneer preferred. See example below.
11. Click Save and Proceed
12. Check all details are correct
13. Click Send Email.
14. The Auctions team will confirm by sending a calendar invite to the agent and a confirmation email.
15. Once confirmation has been sent, the Auctions team will update the listing in AgentBox with the Auctioneer name.



McGrath

The McGrath Sales Process

Notes about Auctions

Cancelling an Auction: If the auction has been booked and you have received your outlook invitation and/or it is approved in Mars/AgentBox, you have 48hrs from the time of booking to cancel the auction without incurring an **Auctioneer Booking Fee (ABF)**. If it is cancelled after 48 hours an ABF will be charged.

Rescheduling an auction: Once the auction has been booked and you have received your outlook invite and/or it is approved in Mars/AgentBox, you have 5 working days to reschedule the auction with the same auctioneer, without incurring an additional ABF. If it is outside the 5 business days, then an additional ABF will be payable. If the allocated auctioneer is not available on your revised date/time, then an additional ABF will be payable to engage another auctioneer's services. If the property auction time/date is moved forward with the same auctioneer to ensure the property is sold under auction conditions; then no additional ABF will be payable.

Sold Prior/Passed In/Withdrawn: Full ABF is payable.

No Fee Payable: If the property is sold prior/withdrawn or transferred to EPT 8 weeks or more from the booked auction day; then no ABF will be payable.

Extreme Circumstances: In the event of extreme, unique or unusual circumstances being presented as a genuine reason for an auction date/time to be changed or cancelled it will be assessed on a case by case basis.

Multiple Bookings: When the same vendor submits three or more properties in the same building/development/street to auction on the same date and time, the vendor will only be charged two ABFs for every 3 properties booked in for auction.

McGrath

The McGrath Sales Process

Preparing your listing for the web

For Sale Tab

1. Enter Sale details, the form fields will change depending on the property type.

Search Price - Numeric value only that is hidden to the public, used to determine the search range on your website and the various portals

Search Price Range - Ability to add / edit a Search Price Range for residential listings when exporting to portals (currently only domain.com.au supports price ranges). The most important thing to know is it is the Search Price that is used on all portals, so keep that into consideration as it will have the 10% buffer (up and down) to where the property appears in searching list results.

Display Price - This is the advertised price and can include all characters and symbols. Maximum 50 characters permitted if exporting to realestate.com.au. If confidential, please enter 'Contact Agent' (approved standard for McGrath).

Quote Price - This is for Internal visibility only and will show on the Standard Internal Stocklist

Rates and Outgoings - All rates information will be advertised if entered. See next page on how to obtain rates.

GST (inc/exc/NA): - N/A

Stock (inc/exc): - N/A

Financial Details : N/A

Investment Details: these fields are for internal notes/use only

Fill in rest of details as required.

The McGrath Sales Process

Preparing your listing for the web

Obtaining Water/Council/Strata Rates

It is usually best practice to complete these fields so that they feed through to our marketing materials for prospective buyers.

To Obtain Water Rates:

1. Go onto sydneywater.com.au
2. Under the Accounts & Billing Tab on the top of the screen click on -> Understanding your bill -> Fixed charges calculator.
3. In the search bar type in the property address. It will provide you with the total fixed charges per quarter.
4. If this isn't working or is glitching call Sydney Water on 13 20 92 and enquire over the phone.

To Obtain Council Rates:

1. Call the council of that property and enquire over the phone by asking for the estimate council rates. They may ask for you to provide them with the vendors full name.

To Obtain Strata Rates:

1. To obtain strata rates, you will need to call the strata company of the property and let them know we are the selling agents for the property. Provide them with either the address, or the Lot & Strata Number and Vendors name and ask for the quarterly strata rates.

Alternatively, you can ask the owner to provide a copy of their most recent bills as this will give accurate insight on the quarterly rates.

The McGrath Sales Process

Preparing your listing for the web

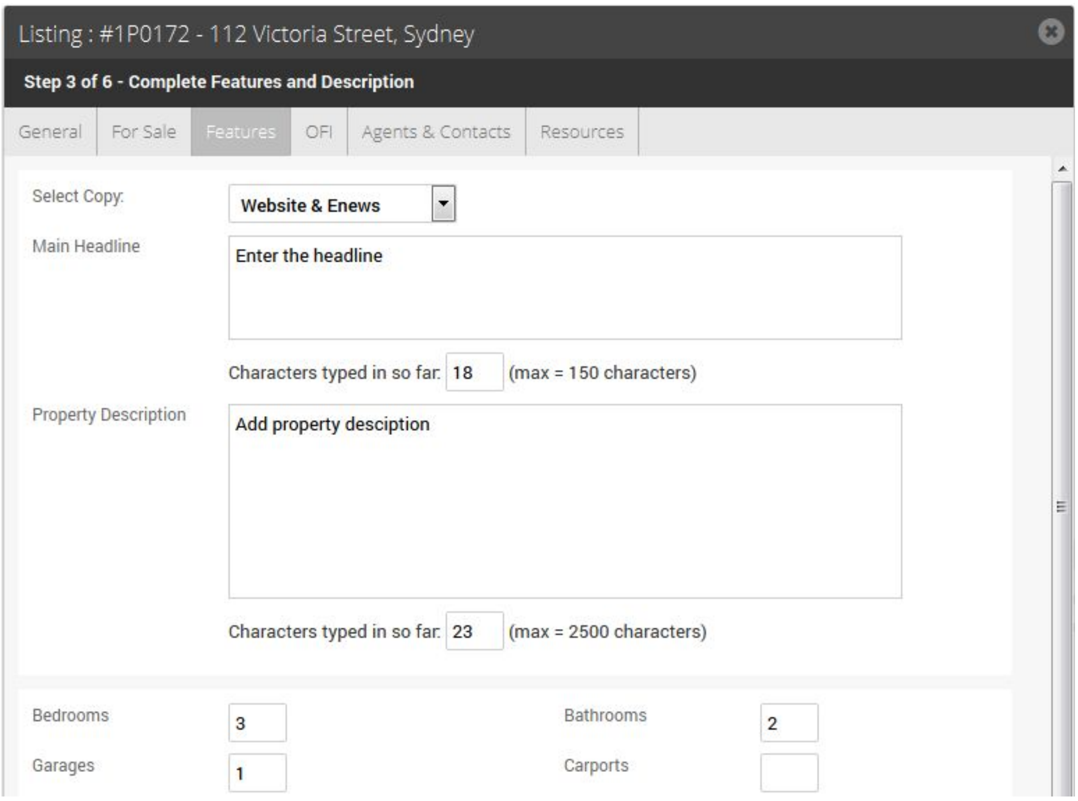
<u>Features Tab</u>

1. Enter the **property features** and description.

Note: Ticking the retirement feature will send the listing to the retirement living page.

Property Details:

- All information will be advertised, so important to ensure all details are accurate.
- The copywriting sections will automatically be filled out once your copywriting has been approved in CampaignTrack.
- Important fields to complete are bed, bath, car, land/internal size, checking other features as relevant.



5. Click **Save and Proceed**.

McGrath

The McGrath Sales Process

Preparing your listing for the web

OFI tab

1. During COVID select 'By Appointment' as the Open Type
2. Outside of COVID, select 'As advertised or By Appointment for the Open Type
3. Outside of COVID, to add in **inspections times**
    - Select the Date and time and click Add Open Time.
4. Click **Save and Proceed.**
5. To prepare your open home packs refer to the checklist in upcoming pages.

Agents & Contacts tab

1. To assign any **related contacts or agents**:
    - Select **role** from drop-down
    - **Type Agent name** and **select** from results
    - Click **Add**, to insert as selected agent
    - **To hide an agent** from the website, Un-tick the check box next to their name in the Appear on Site box and hit save

*Note: for reporting and commissions it is important that all related agents are assigned to the property. The first Selected Agent box should contain an Appraisal Agent, Listing Agent, Selling Agent and any referral agents by the end of the sales process.

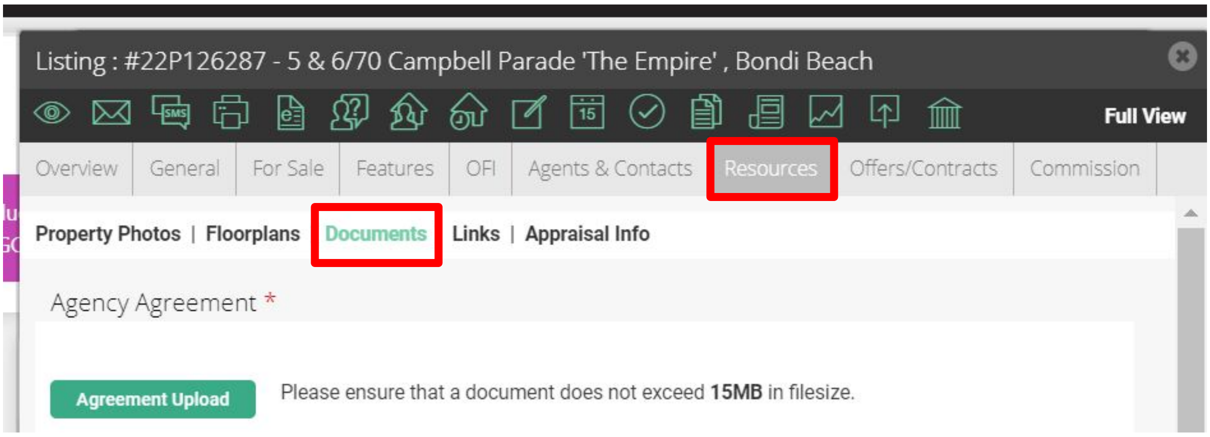
*Note: to link contacts to properties and to populate the Sales Advice and letters it is important that all related contacts are assigned to the property. The Selected Contacts box should contain at least the Vendor, Vendor Solicitor, Buyer and Buyer Solicitor by the end of the sales process.

7. Click **Save & Proceed.**

The McGrath Sales Process

Resources Tab

1. To upload any **Resources,** click on the relevant sub-tab and click the appropriate upload button.
2. Ensure you label the resource appropriately and clearly.
3. As a compliance minimum, you will need to upload your Signed Agency Agreement, Your minimum of 3 comparable sales and your Draft Contract of Sale. **See 'Ordering a Contract of Sale' in next pages.**



4. Click **Finish**

You can now...

- Start using all property action icons and all items from the left property panel (By clicking 'Full View;).
- Vendor Preview Link - You can view a preview link for the Vendor for sign off by clicking the EYE icon.
- Advertise on your website - You can now instruct your Campaign Coordinator (CC) to send the property live to portals (REA, Domain & McGrath websites).

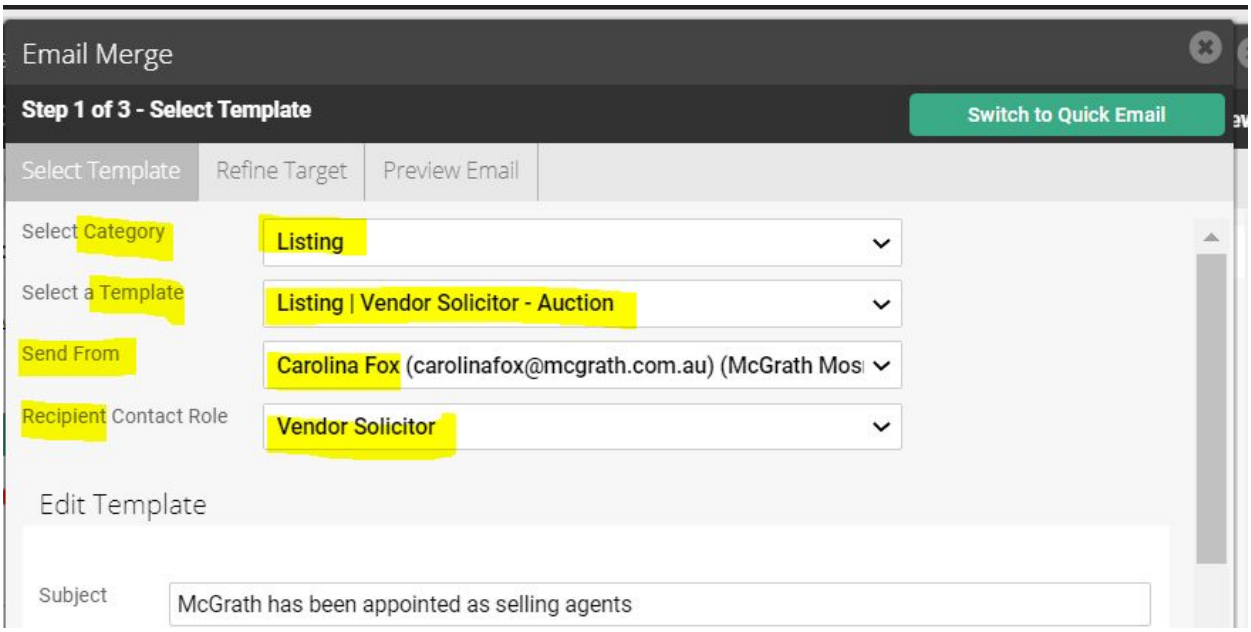
McGrath

The McGrath Sales Process

Ordering a Contract of Sale

To order the contract of sale, you can do this directly via post or email by emailing the solicitor with a formal request. We do however recommend doing it via Agentbox so a record is kept in the Communications History.

1. Open the property listing card and click on the EMAIL (envelope) green icon.
2. Select 'Email Merge/Template'
3. **Category**: Listing
4. **Template**: Listing | Vendor Solicitor - Auction (or other Sale Method as relevant)
5. **Send From**: Select agent name
6. **Recipient**: Vendor Solicitor
7. Check letter content before sending.
8. **To include a copy of the Agency Agreement**: click paper clip icon and ensuring the Signed Agency Agreement has been uploaded to the **Documents** tab under the **Resources** section, and select the relevant document to include.



9. **Save and proceed** > **Save and proceed** > **Send**.

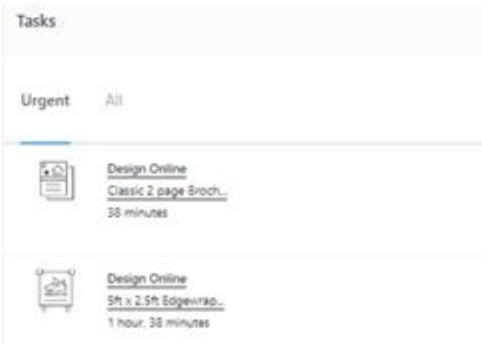
The McGrath Sales Process

Marketing preparation

Designing Marketing Artworks

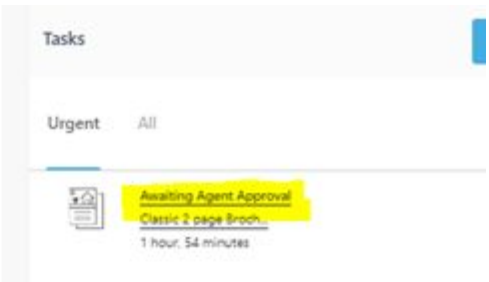
Note: orders must be confirmed/activated in CampaignTrack before we can access to design the artwork. There is no way we can design/mock-up if the order is still in the quote stage.

Once activated, materials that need designing will show under the campaign's tasks in CT

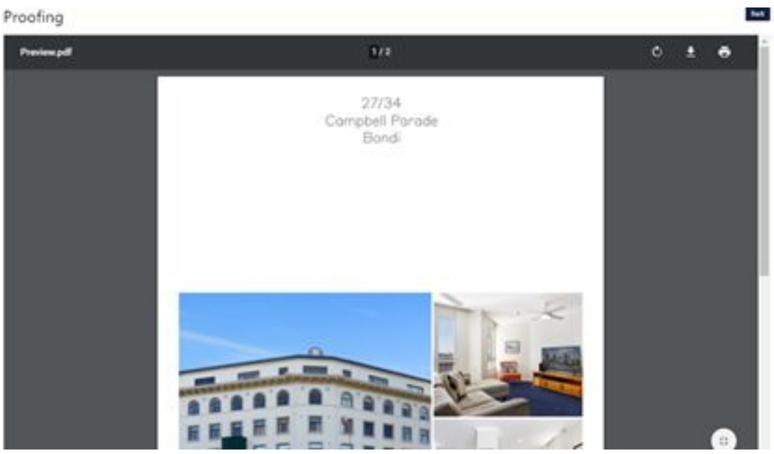


Brochures

1. Click on Brochures under Task in CT



2. Click **Edit Artwork** on the right side of the page



McGrath

The McGrath Sales Process

Designing Marketing Artworks

4. You will be redirected to the design page in CT. You will be prompted to select a template you want to use. Just select whichever it is and fill out the necessary details. Once done, don't forget to hit **'Save and Continue'**

5. You'll then be redirected again to the next pages, just do the same by filling out necessary details and hitting **Save and Continue** once you're done with that page.

6. If all has been finalised, hit **Approve for Print** so it goes to Admin Approval.

Brochure auction and OFI format:

Auction: Day Date Month Time

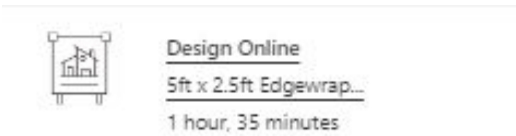
E.g. Saturday 19 September 3pm

OFI time: use (.) period and have space between (-) dash and second time

E.g. Monday 3pm – 3.30pm

Signboard

1. Click on **Signboard** under Tasks in CT



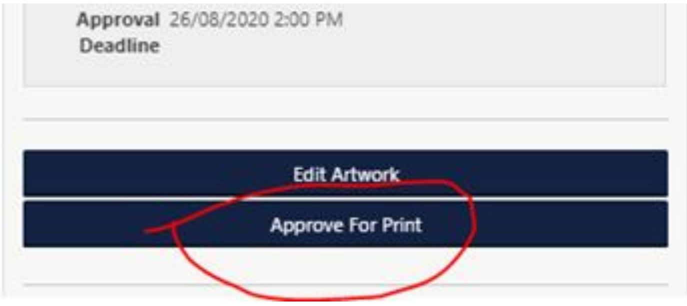
The McGrath Sales Process

Designing Marketing Artworks

2. Click **Edit Artwork**, once you're in the design page, you'll be prompted to select a Template. Just click whichever you want to use.

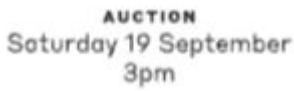
3. Fill out necessary details on the design page and click **Save and Continue** or **Save and Approve** once done.

4. If all have been finalized, hit **Approve for Print** so it goes to Admin Approval.



Signboard Auction and OFI format:

Auction: time below the day and date

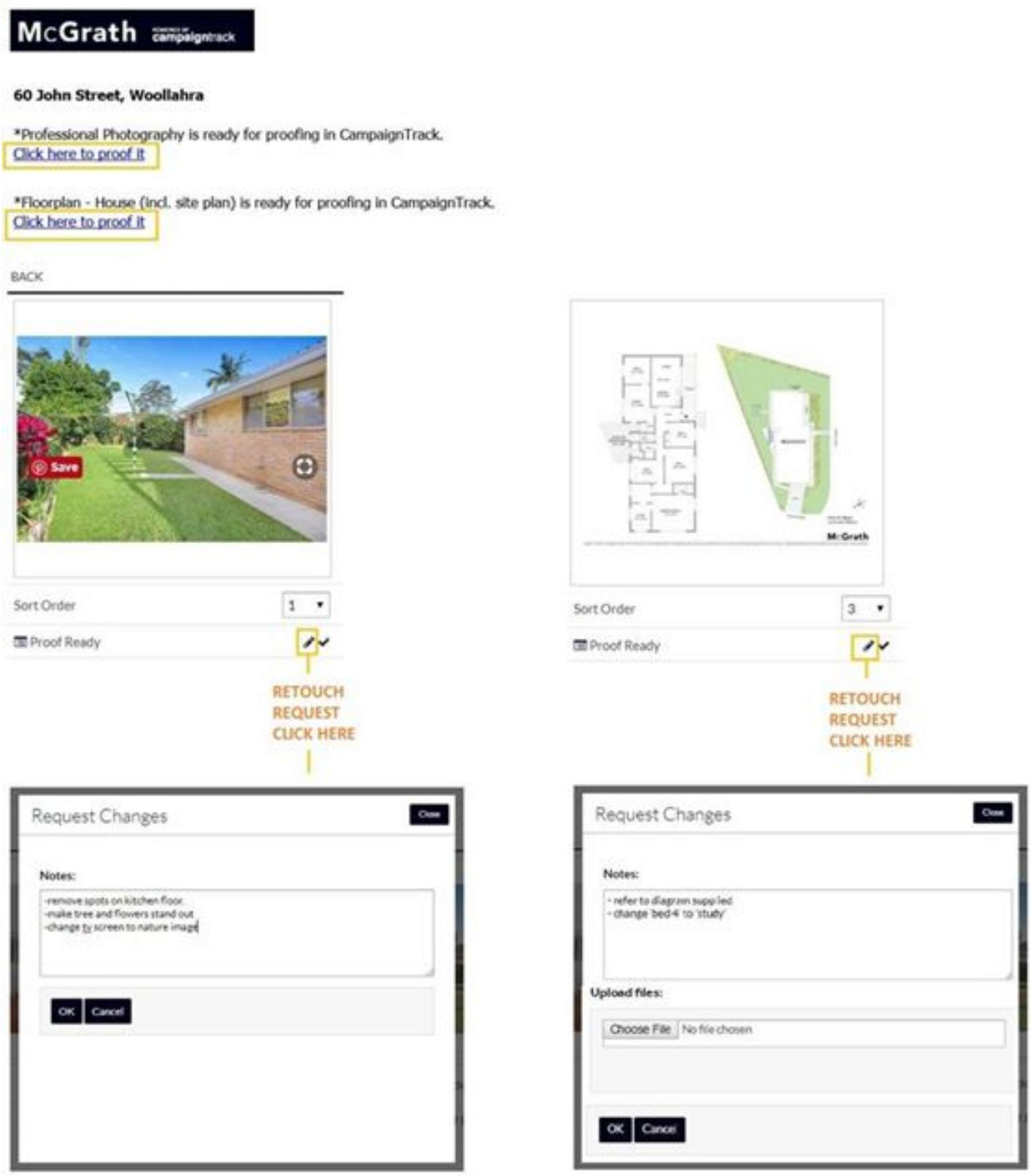


OFI: Use (.) period and have space between (-) dash and second time

The McGrath Sales Process

Retouching Proofs

In CampaignTrack, you can submit retouch requests direct to retouching team. Please note all retouch requests have up to a 4-hour turnaround from submission time.



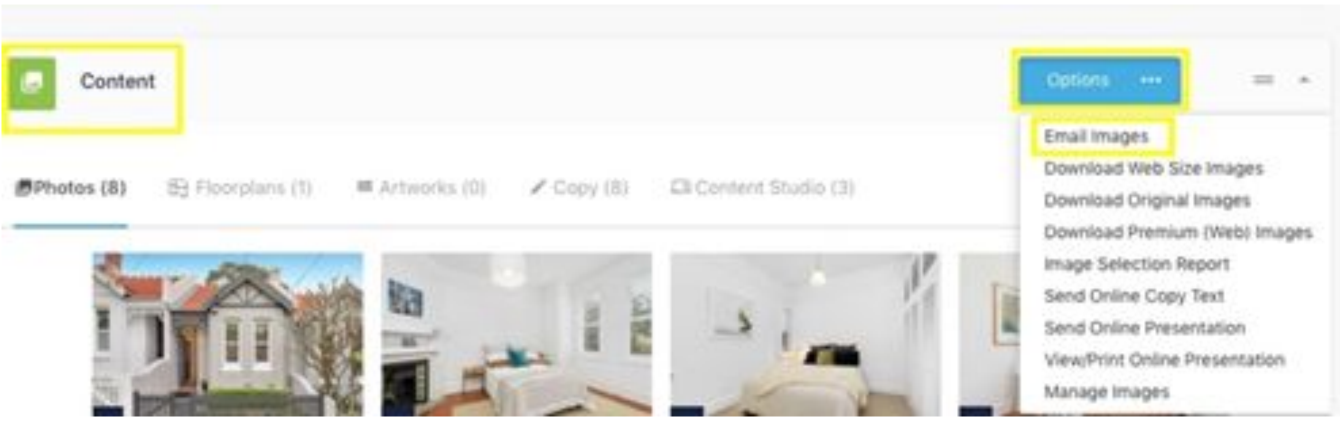
McGrath

The McGrath Sales Process

<u>Emailing Property Photos</u>

via Campaign Track

1. Go into the Property in CT
2. Scroll down to the Content Section.
3. Click on Options on the right.
4. Click Email Images
5. Type in the email you wish to send the photos to.
6. Type in a message if you wish.
7. Select all images/the photos you would like.
8. Select whether you want to send Original (High Res) or Web Size.
9. Click Send



McGrath

The McGrath Sales Process

Getting your listing approved

via Agentbox

1. Go into the listing.
2. Check agency/contract and cross reference with the listing to make sure it is compliant.
3. Make sure the following is included in the contract:

    Section 10.7 aka Planning Certificate, to make sure the name/address on the 10.7 is identical to what is on the front page of the contract and the agency) Make sure this is dated within 6 months.

    Title Search Make sure this is up to date. (Make sure the name/address on the title search is identical to what is on the front page of the contract and the agency)

    Sewer diagram is in the contract.

4. Ensure the agency has price range filled, commission is filled (and match what is in agentbox), names are filled, then dated and signed at the bottom.

5. In the **Resources Tab,** double check Vendor I.D, rates, comparable sales are all saved in the Documents section.

6. Always tick **Hidden Listing** and **Save**.

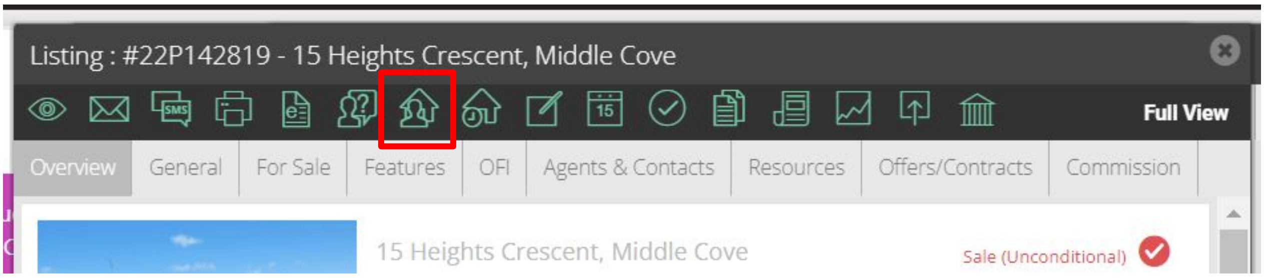
7. **Email your Front Office Manager** to approve the listing for you ASAP so that the property can be pushed to portals (e.g. Domain, realestate.com.au, McGrath website).

The McGrath Sales Process

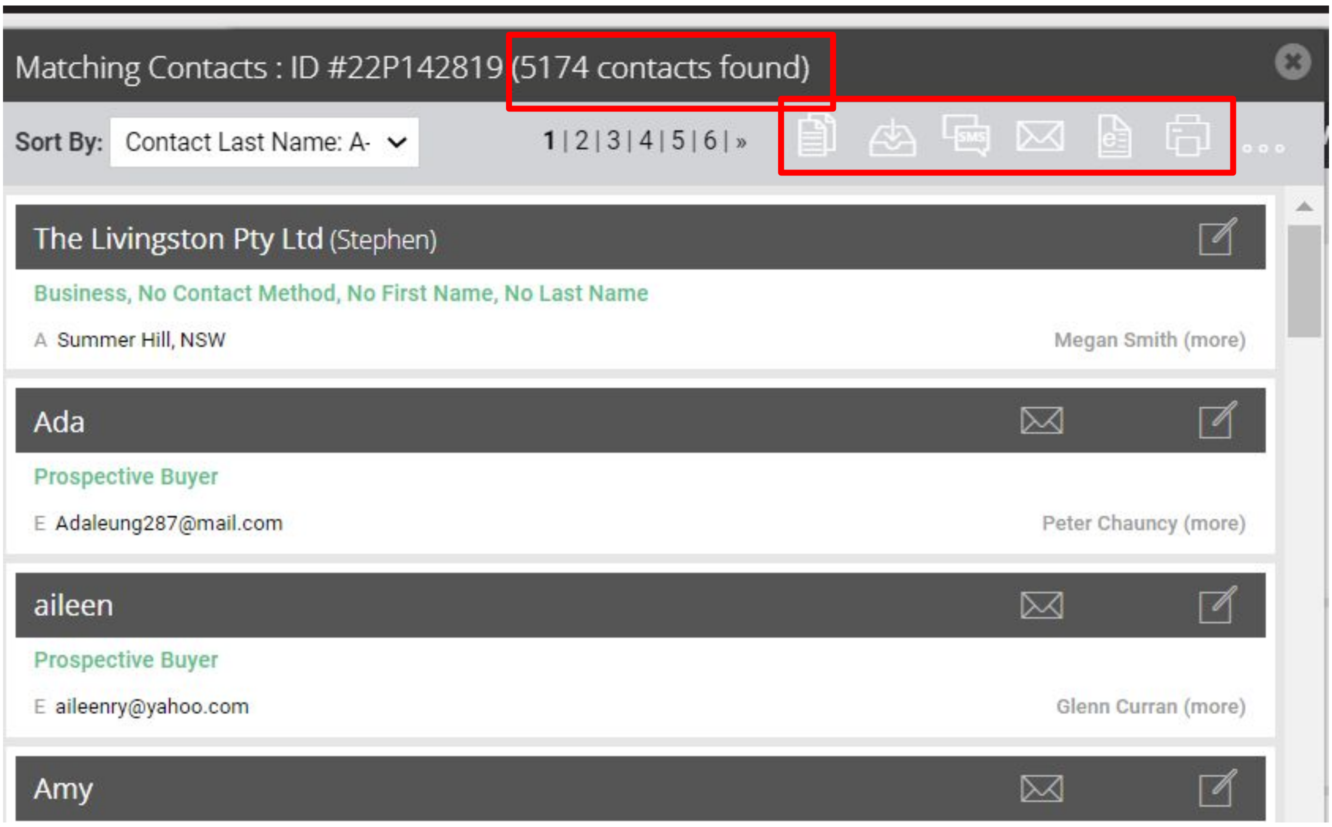
Doing a Buyer Match

via Agentbox

1. On the listing card, click the Buyer Match icon (7th from the left)



2. A list of matching buyers will appear, which you can then make bulk communication with.



McGrath

The McGrath Sales Process

Altering your listing

Cancelling an Auction

1. First thing to do is email Auctions if the agent hasn't already, and request to cancel the auction.
2. Wait for Auctions team's response that the Auction has been cancelled.
3. Once confirmed by Auctions, then go into the General Tab.
4. Click on the Sale Method Drop-down box and Click Private Treaty.
5. Untick the "Listed as Auction" box.
6. Save.

Changing a Price Guide

via Agentbox

1. When changing a price in Agentbox, always make sure it is compliant with the Agency Agreement.
2. Never change the guide to show less than what the signed agency agreement says. (Unless you have written approval by the vendor) - Always put written approval from the vendor into the Resources -> Documents section in Agentbox.
3. See **Price Variation letter** in your Compliance Templates folder.

   E.g Agency Agreement says $1,300,000 - $1,400,000 and your agent asked you to display guide of $1,100,000 this will not be compliant UNLESS there is written approval from the vendor advising the lower price is acceptable. Only in this instance are you allowed to change the guide.
4. Complete the variation letter and send a copy to the Vendor. Update the Agency agreement and re-upload into the system.
5. Update the display price in Agentbox if relevant.

The McGrath Sales Process

Altering your listing

<u>Withdrawing a Listing</u>

1. If an agent asks you to withdraw a live listing in Agentbox, you must first email the CC to ask if all marketing monies have been paid for.
2. If money has been paid for, the CC will send an email to the agent similar to the below screenshot.

Hi Team,

We have received all payments on this one.
Can I just get confirmation that the below is understood before we mark this as withdrawn from external sites:

<u>Please note relisting withdrawn/off-market policy's for the followng sites:</u>

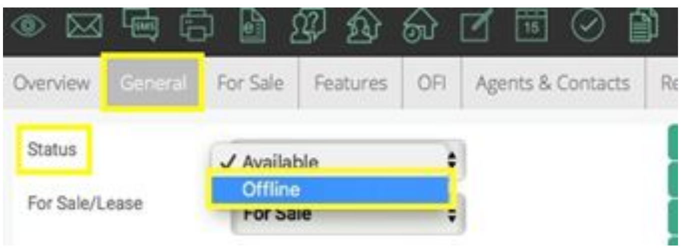
REA

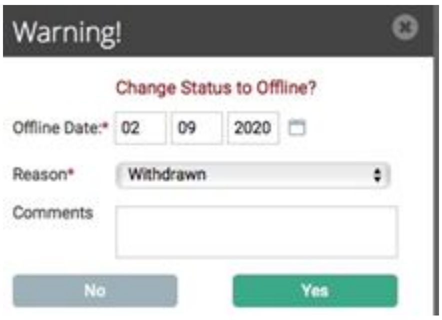
- If the property is archived and relisted under the same REA Profile/MARS ID, before 60 days there will be no charge. However if the 45 Days Premier Property expires and you still need it back to a premium spot, the 50% refresh fee will apply.
- If the listing has been withdrawn for more than 60 days, the full rate will apply. *Prices are subject to change due to annual price increases
- If the listing has remained active and for sale for more than 60 Days the 50% renewal fee applies

DOMAIN

- If the property is archived and relisted under the same Domain Profile/MARS ID, then the 50% refresh rate will trigger but only if the reactivating of the property takes place within a 60 days of the listing being pulled off the market
- After 60 days of the listing being pulled, this will then be considered a new listing and full listing fee will apply *Prices are subject to change due to annual price increases

3. Once the agent emails back and confirms that this is understood, you then remove it from Agentbox. To do so:
4. Click into the general tab in the listing. On the status drop down menu select "Offline"
5. This will then prompt you to choose a reason, which you should select "Withdrawn" then Yes.





McGrath

Altering your listing

Withdrawing a Listing

6. If the marketing has not been paid for, the CC should flag this with the agent and generally loop in the sales manager and/or Marisa. It depends case by case on what happens. Usually the CC will ask us to stand by until we get instructions from the agent.

The McGrath Sales Process

Preparing for your Open Home

Marketing Materials

1. You should be live on the web
2. You should also have your brochures arriving before your first open home
3. You should have approved your signboard for install prior to your first open

OFI Pack

Every agent has their own OFI pack that they like to use. The below list is just a guide with compulsory items in **BOLD**.

- **COVID plan, documentation and signage**
- OFI Bag
- Tag for the bag with the property address
- Pen
- Property Keys and alarm codes
- **Collection notice**
- Office of Fair-trading (Bidder's Guide)
- Stamp duty document
- Open Home Booklet to take names
- Large handful of brochures (to be checked for every open home)
- Comparable Sales – laminated, to be displayed
- **2x Draft contracts (bound with cover page)**
- Property Questionnaire – laminated, one for each staff member to ensure consistecy in info given
- Property Information sheet – laminated, to be displayed
- Before you Bid information – laminated
- Pest and building (only if the property has a report)
- Business card holders/business cards
- Open Home Flag
- A Frame / pointer board (if needed) – blue tac / sticky tape
- Open Home signs (if needed) e.g. garage access, pool area, toilet, remove shoes, ring buzzer, lift
- Lollies or Mints
- **Hand sanitizer**/Wet Wipes (if needed)

The McGrath Sales Process

Preparing Vendor Reports

via Agentbox

1. To create a vendor report you will need REA and Domain reports from the agent (showing internet statistics) *Please note every agent likes their reports different but this is a general guide.

2. Go into the listing

3. On the left-hand side there is a grey bar, click on the "Inspections and Attendees" Section. (Pictured below) At the bottom, click "Activity Report".

4. You will now see the vendor report.

5. Scroll down and click on the subheading "Activity Report" to edit your vendor report

Title: Change to "Weekly Sales Report"

Intro Title: Remove

Statistics Title: Leave as is

Open Homes: The Open home number is automatically calculated. Although the attendee number needs to be changed.

Enquires: Add up what is on your Domain & REA reports.

Days On Market: automatically synced so leave as is

Advertised price: Leave as is.

Internet Statistics: Find out what portals this listing is on and list these.

E.g McGrath web/Domain/REA

McGrath

The McGrath Sales Process

Preparing Vendor Reports

via Agentbox

6. Next to the name of each portal, include how many hits there are. Domain and REA you will find off the reports. To find McGrath hits, email McGrath Help.

7. Leave the rest of the details as is except change the concluding title to "Moving forward". Scroll down to "Details Display"

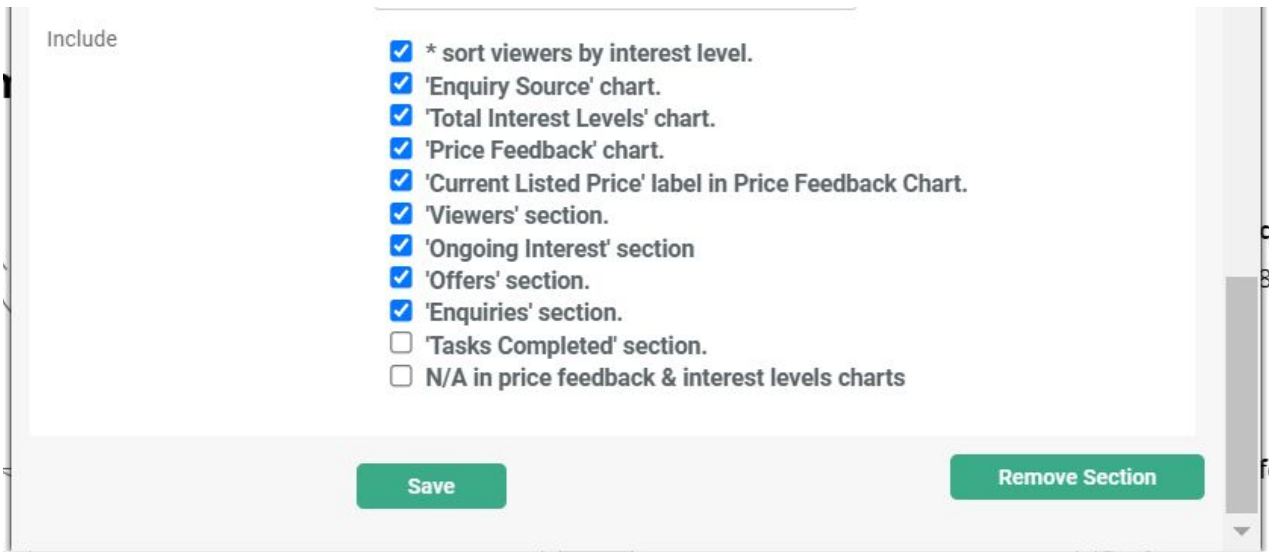
8. Change the period to whatever week your agent wishes.

9. Presented by: make sure agent details are correct.

10. Leave everything else as is and save. Once you save and proceed this will generate a PDF, you can either save this or send it straight to your agent, or send it to the vendor through your agents email via Agentbox.

11. Note, you can untick any of the checkboxes at the end of the editor pop-up box such as any graphs that you want to hide, or your 'Enquiries' section (which is usually really long, so best to remove).

12. Once you have saved, you can print a PDF of the report or email it to the vendor directly from Agentbox.



The McGrath Sales Process

Sending out e-Newsletters

via Agentbox

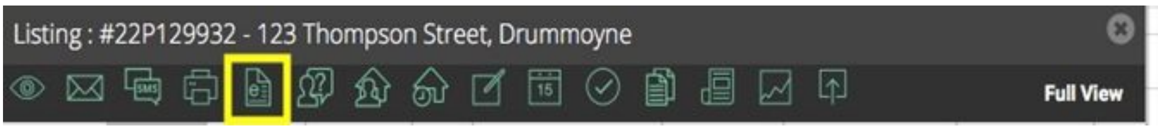
There are many reasons we could be sending out e-newsletters to clients. Please note Agentbox automatically sends out buyer alerts for all new listings that match the buyers criteria in Agentbox, so you should never have to send a Just Listed newsletter.

Some of the e-newsletters include:

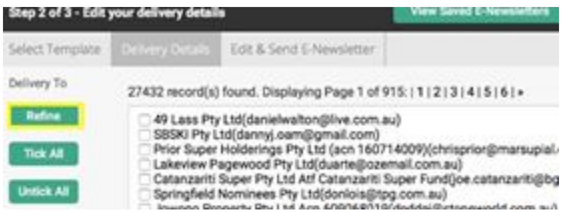
- Price reduction
- OFI Invite
- Auction Invite
- Just Sold

To send out e-newsletters:

1. Go into the listing on Agentbox
2. On the top black bar, click the e-newsletter option (5th from the left)



3. Select whichever template you/your agent require.
4. Click the green Refine button to refine your search for the recipients..



5. Refine your search by adding in the Contact Class e.g buyer, prospective buyer etc.
6. Select the category of the property e.g Apartment, House etc.
7. Select the Suburbs your agent wishes to reach.

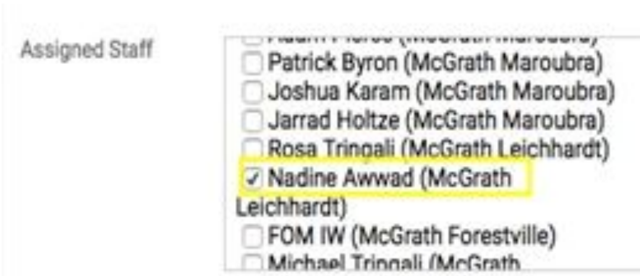
McGrath

The McGrath Sales Process

Sending out e-Newsletters

via Agentbox

8. Refine your search by Price range/Bedroom range. Search.
9. Click the green "Tick All" button on your top left.
10. Choose which email you are sending this from and the subject line and Click Save and Proceed.
11. You can send for testing and if agent is happy send it through by clicking Send Now



The McGrath Sales Process

Exchanging a Property

via Agentbox

Before you exchange a property in Agentbox, you need to ensure:

- Both contracts are signed and dated
- Both contracts are the same and in identical order
- 66w is included (if unconditional)
- The deposit has been paid (via DEFT Auction Pay/Cheque/EFT receipt
- Auction documents (if applicable)
  - Bidder cards
  - Bidder record
  - Bidder form
  - Reserve letter

When exchanging properties in agentbox, to ensure it is fully compliant, you need to make sure the following documents have been uploaded into the Resources tab in Agentbox.

- Agency Agreement
- Contract of Sale
- Listing letter to vendor/solicitor if applicable
- Comparable sales
- Price change forms if any
- Auction docs if any
- Exchange Letters (inc sales summaries)
- 66w (if unconditional)
- Signed Front pages of the contracts
- Deposit Receipt

McGrath

The McGrath Sales Process

Exchanging a Property

via Agentbox

Adding an Offer into Agentbox (Offer and Acceptance)

1. Go into the property card in Agentbox
2. Click into Offers/Contracts then begin to type in the Offer price, Buyer and Buyer Solicitors details.
3. Click Add.
4. If Accepted, Click Offer Accepted on the bottom left.
5. If the Agent wants the property to show online as Under Contract click on the Green "Under Contract" button.
6. Double Check details (date and price) are correct.

Completing an Offer and Acceptance Sales Advice (not always required)

1. Refer to the Offer and Acceptance documents in the training folder.
2. Fill in the relevant spaces in the documents, as per clients details in the contract.
3. Once the documents are completely, email them to your agent to send off to their clients.

The McGrath Sales Process

Exchanging a Property

<u>Receiving a deposit</u>

There are 3 Methods a Purchaser can use to pay their deposits:

1. **Auction Pay (Recommended method)**

   This is an Electronic payment system hosted by Macquarie Bank where we can log the property sale information, the purchaser's details and bank account information for the deposit transfer to take place:

   URL: https://auctionpay.deft.com.au

   The system will send an automated email notifying you once the deposit has been made.

   Note: the bank account details provided must belong to the client. If they need to use funds from another sale, the client would need to request an early release from the other agency so they can make an EFT transfer to us.

2. **Electronic Transfer**

   Payment into McGrath's Trust Account using our BSB & Account Number
   If possible, we should try to obtain a transfer receipt from the Purchaser
   We must then forward this to the Settlements Team, informing them of the incoming deposit so that the funds can be allocated correctly. Your FOM can confirm your Settlements Team and Bank Account Details if unsure.

3. **Cheque – Purchaser provides the Agent with a cheque.**

   If you receive a cheque, scan a copy to yourself to upload to Agentbox in the Resources section..
   Give the cheque to your FOM along with the details of the property.
   Your FOM will either deposit the cheque at your local NAB branch or courier to the Pyrmont Head Office.

   Note: We do not accept cash deposits.

Exchanging a Property

Receiving a deposit

See below pros and cons of the various payment methods

	EFT (Bank Transfer)	Cheque	Auct. Pay (DEFT)
Business days for funds to clear	1	3	3
Transfer amount limitations	Yes (Clients may need to contact their bank to allow transfers over 10k)	No	No
Proof of transfer	Client provides screenshot of transfer receipt	N/A	Auction Pay sends automatic receipt of payment
Risks	Client can enter the wrong account details	Cheques can be lost	Client may have insufficient funds in their account

The McGrath Sales Process

Exchanging a Property

via Agentbox

Exchanging Physical Contracts

1. Ensure both printed copies are identical. Any clauses that may have been added or removed should be initialled and reflected on both copies.

2. The purchaser details, sale price, deposit amount and balance should be filled out on both front pages.

3. Once copy should be signed by the vendor/s.

4. Once copy should be signed by the purchaser/s.

5. Once both contracts have been signed, both contracts should then be dated.

6. We then need to create the covering letters.

7. Depending on whether it is conditional or unconditional, the relevant letters can be found in your templates folder or as a saved template in Agentbox.

8. Exchange correspondence should be provided as below:

   - **Vendor** should receive an email confirming exchange (Agentbox template)
   - **Purchaser** should receive an email confirming exchange (Agentbox template)
   - **Vendor solicitor** should receive purchaser signed complete contract with printed covering letter (Agentbox template, or can be found in templates folder)
   - **Vendor solicitor** should receive purchaser signed complete contract with printed covering letter (Agentbox template, or can be found in templates folder)

McGrath

The McGrath Sales Process

Exchanging a Property

via Agentbox

Marking a property as Sold

1. For **an Unconditional Sale with a signed 66w,** make sure you have copies of the signed front pages of the contracts, 66w, deposit cheque/EFT Receipt. Upload all of these into the documents section in Agentbox.
2. For **an Conditional Sale with 5 day cooling-off period,** make sure you have copies of the signed front pages of the contracts, deposit cheque/EFT Receipt. Upload all of these into the documents section in Agentbox.
3. Go into the property card on Agentbox.
4. Click into the accepted offer. **NOTE, YOU MUST ALWAYS SUBMIT AND ACCEPT THE OFFER BEFORE MARKING AS SOLD.**
5. Double check to make sure all details are correct.
6. Click the green **Unconditional** or **Under Contract** button at the bottom. Make sure unconditional date is the same date as the Contract Date
7. Enter Expected Settlement date (check date for completion on the contract)
8. Enter Contract Price
9. Double check Deposit amount and Commission amount are correct.
10. For the Commission tab, check with the agent if there is a comm split, if not give the agent 100%.
11. If Auction, enter Auction Result. Ask agent if unaware of result.
12. Ensure you ask agent if price is to be displayed or not.
13. Sold date is always unconditional date.
14. Click Yes.

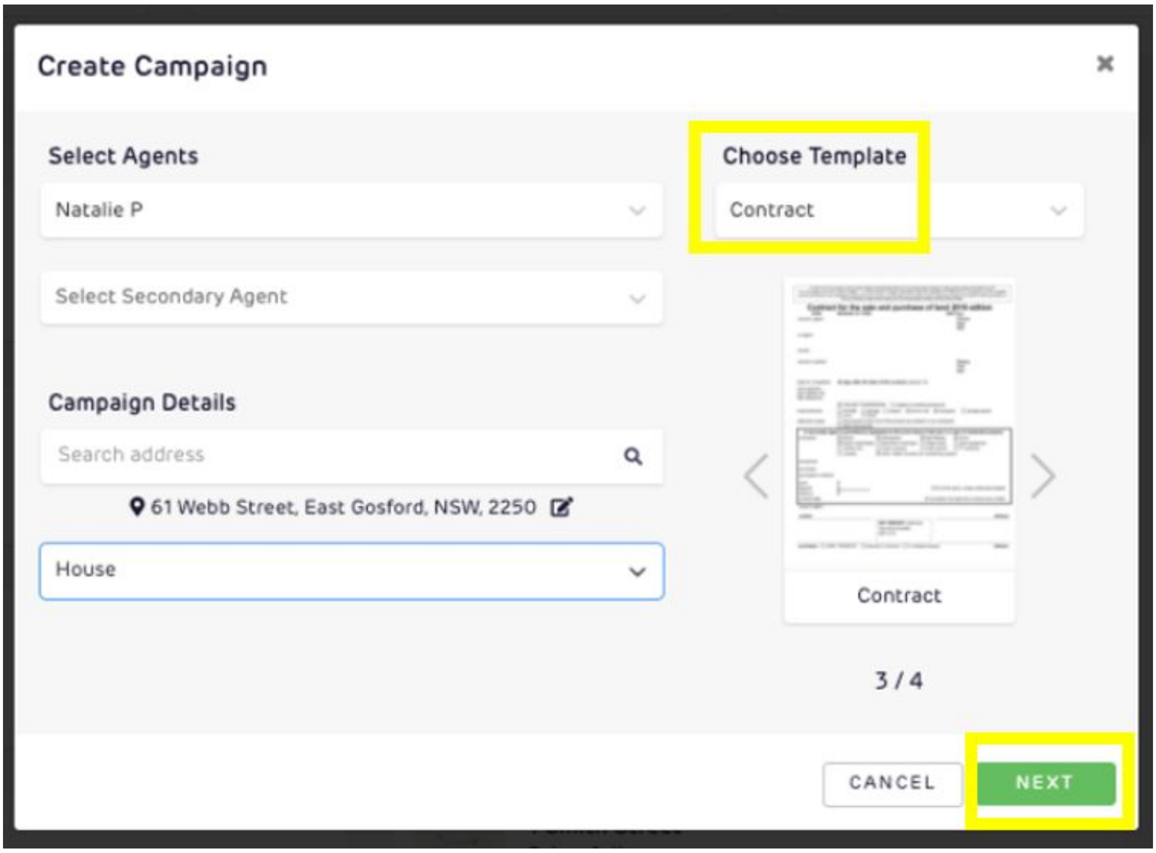
McGrath

The McGrath Sales Process

Exchanging a Property

via Realtair - Sign

1. Create:
   - Click on the create button in Sign
   - Select contract in the template dropdown
   - Type in your property address
   - Select property type
   - Click next



McGrath

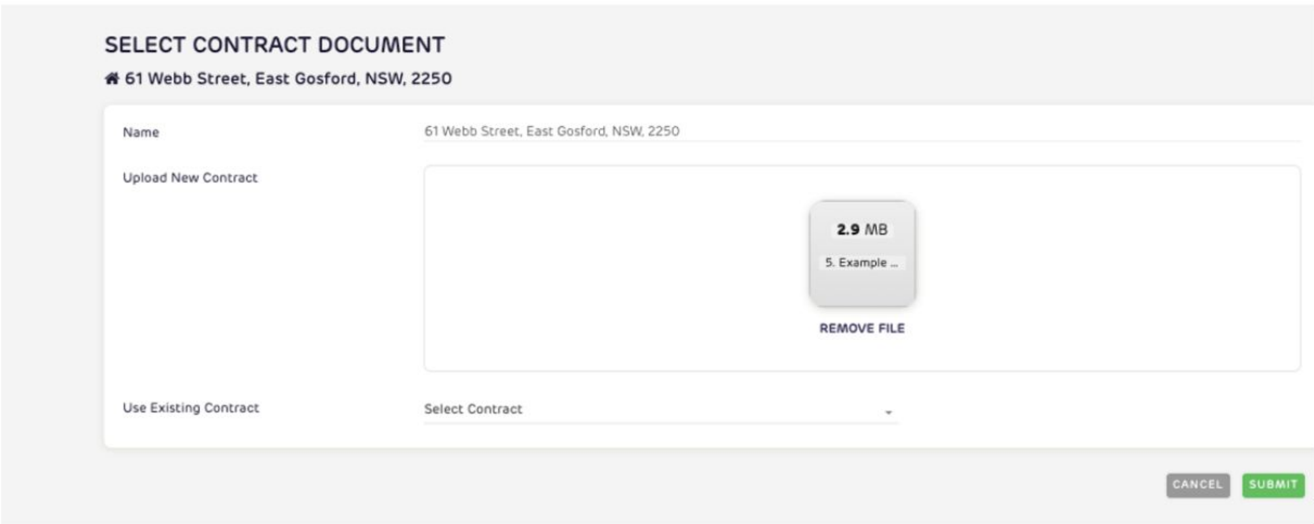
The McGrath Sales Process

Exchanging a Property

via Realtair - Sign

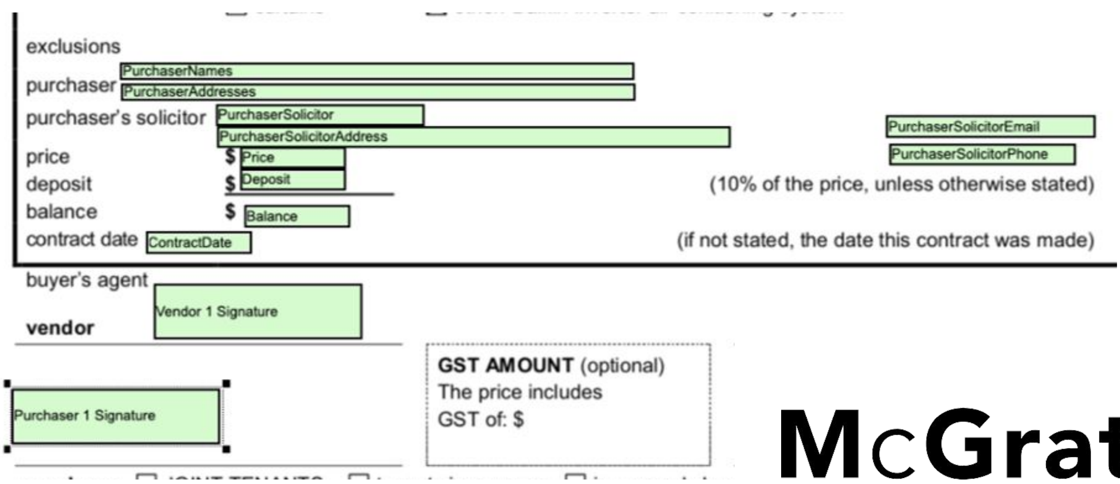
2. Upload contract:

- Give the contract a name e.g. property address
- Upload contract from file
- Click next



3. Text boxes:

- Fix up any text boxes that may be out of line
- Click save



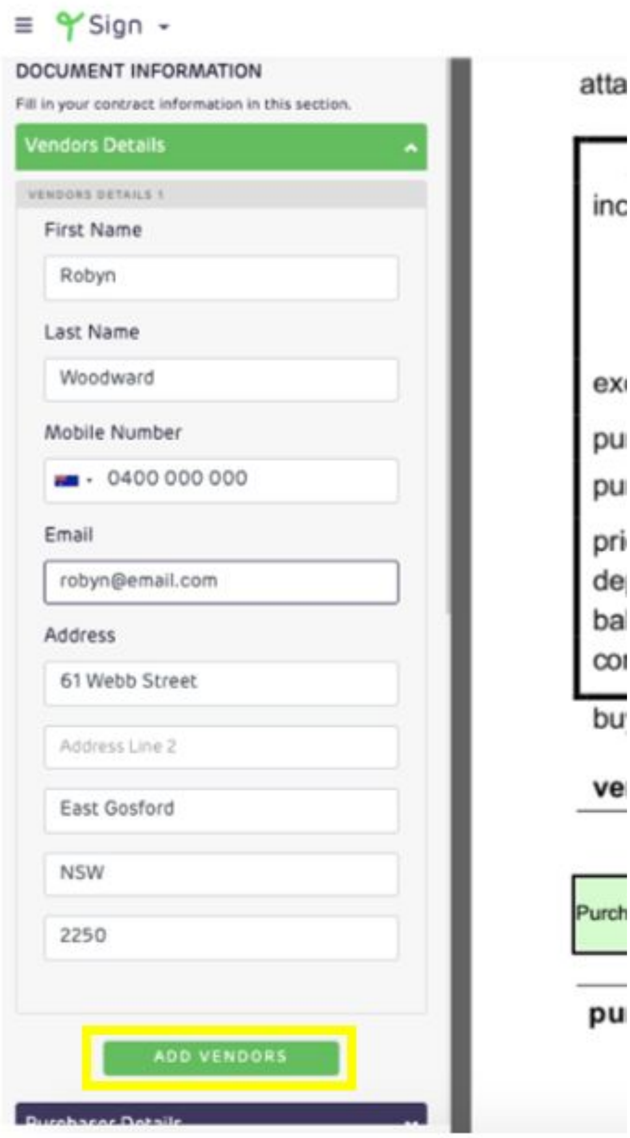
The McGrath Sales Process

Exchanging a Property

via Realtair - Sign

4. Vendor details:

- Add in your vendor details
- Note, if you have completed your agency agreement in Sign your vendor details will pre-populate
- Should you have multiple vendors simply click add vendor to add in their details



McGrath

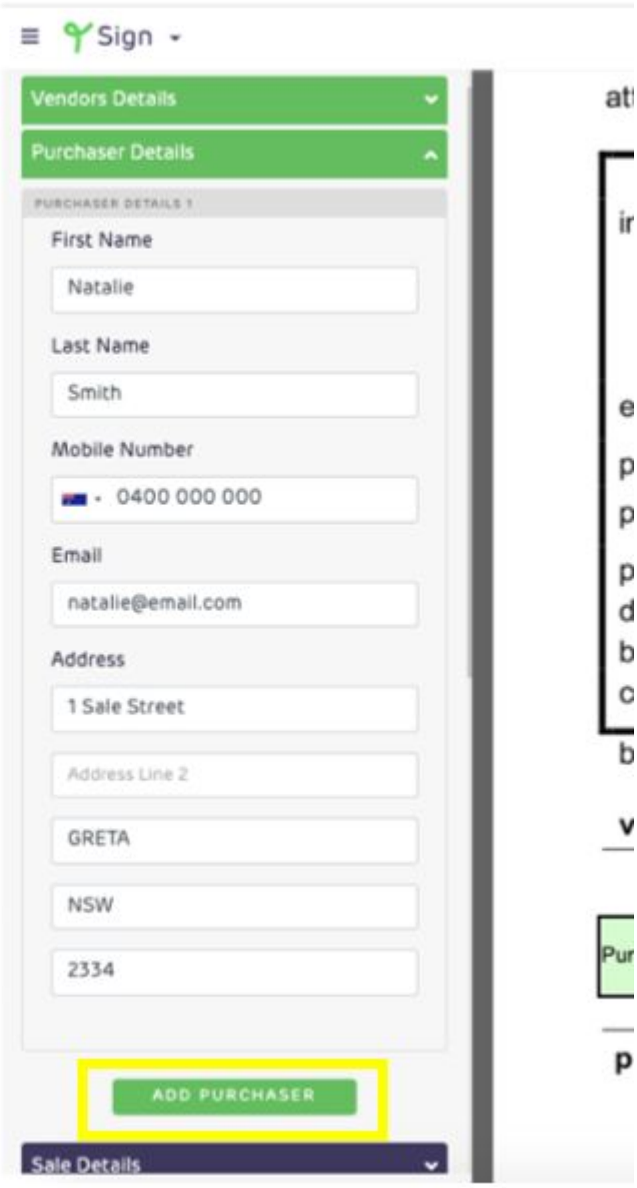
The McGrath Sales Process

Exchanging a Property

via Realtair - Sign

5. Purchaser details:

- Add in purchaser details
- Should you have multiple purchasers simply click add purchaser to add in their details
- As you add in purchaser details this will fill in the document fields on the front page of the contract



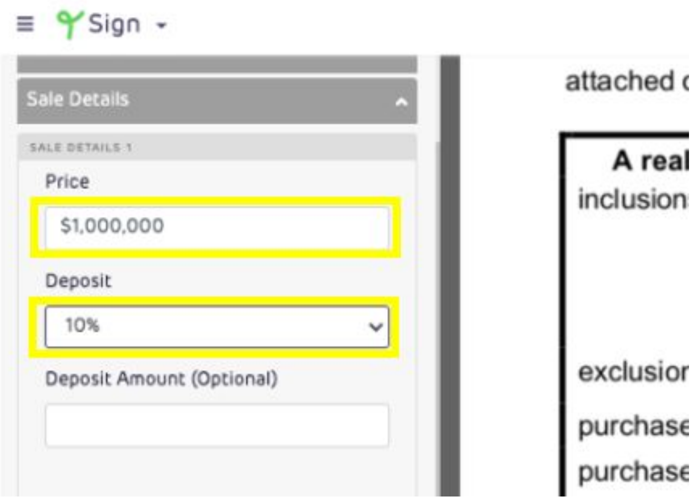
The McGrath Sales Process

Exchanging a Property

via Realtair - Sign

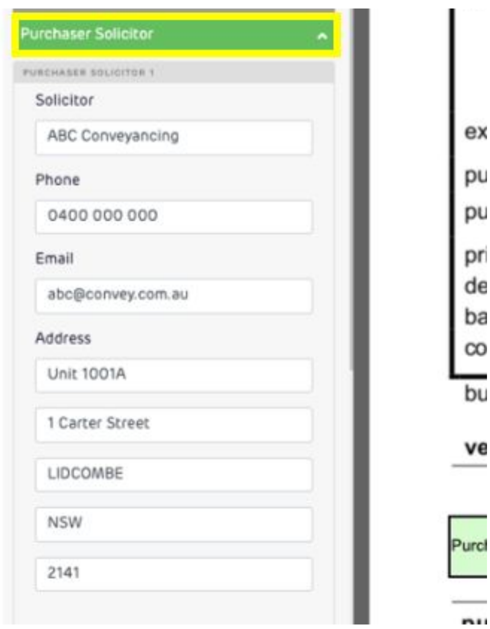
6. Sale details:

- Add in the sale price
- Select the deposit amount
- Once deposit amount is selected, the balance will automatically calculate



7. Purchaser solicitor details:

- Add in purchaser solicitor details
- This information will fill in on the front page of the contract



Exchanging a Property

via Realtair - Sign

8. Buyers agent:

- Should the purchaser have a buyer's agent, you can input those details
- To add in buyer's agent details, open up buyer's agent in document fields and click + button to drop in the text box on the contract.

9. Vendor & purchaser witnesses:

- Signing electronically, it is not necessary to have witnesses however if you would like to add yourself in as a witness simply add in your details are add in the text boxes through opening up the witness section in document fields, clicking the + button and dropping them in on the contract
- Should a solicitor ever push back on a digitally exchanged contract, we have a waiver that explains our rights to exchange digitally. This waiver should be in your templates folder.

The McGrath Sales Process

Exchanging a Property

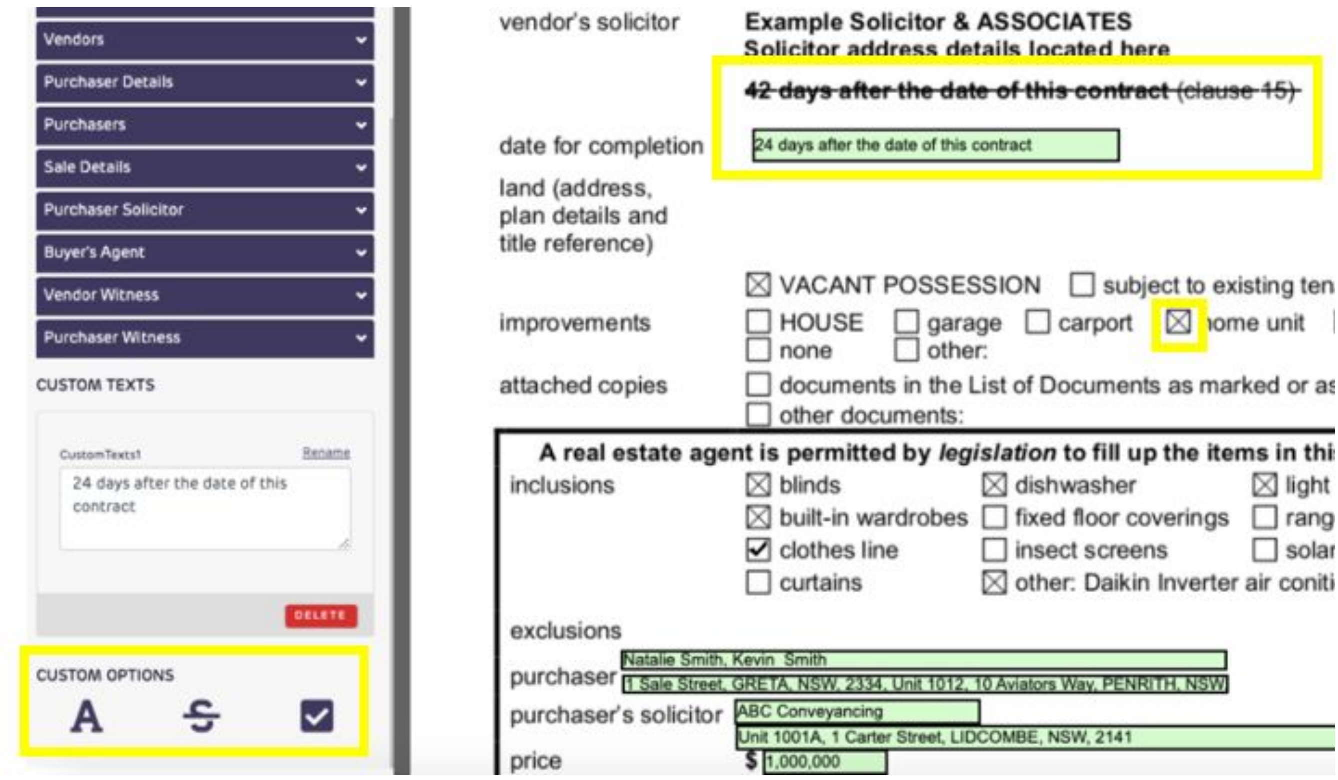
via Realtair - Sign

10. Custom options:

- There are 3 custom options - text box, strikethrough, and tick box

Example: changing settlement date:

- Click on the **strike-through** and hover your mouse over the settlement date on the contract and rule that out
- Select **A** to add in a blank text box, click on the contract where you would like this to go, scroll down on your left-hand side to fill in the text in that text box
- To tick any inclusions, simply click on the **tick box** and insert the tick in on additional inclusions



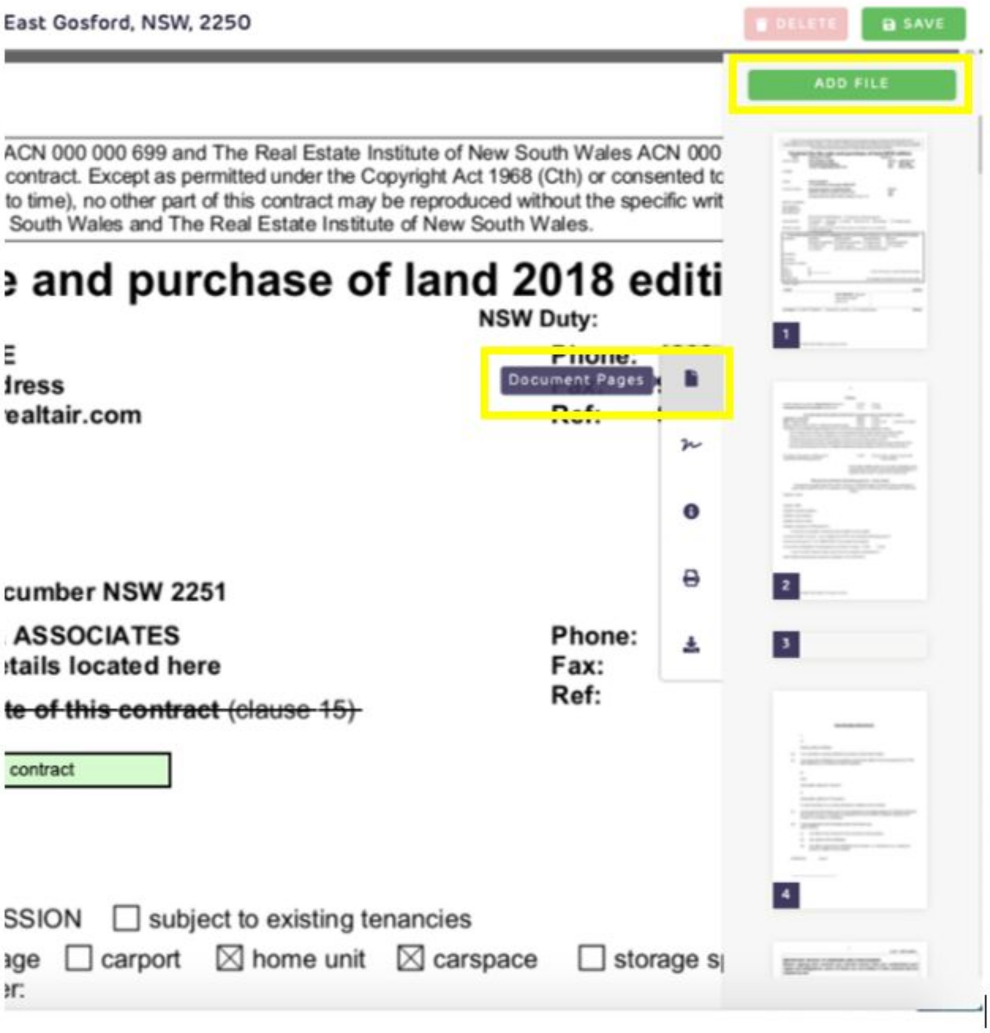
The McGrath Sales Process

Exchanging a Property

via Realtair - Sign

11. Additional documents:

- On your right-hand side icon bar if you hover your mouse over the first icon you are able to upload by clicking add file for any additional documents e.g 66W certificate or additional conditions



The McGrath Sales Process

Exchanging a Property

via Realtair - Sign

12. Signature options:

- Hover your mouse over the signature icon and this will bring up your signing options. In person or remotely

13. Status icon:

- This icon will show you status and provide insight on pending or signed parties

McGrath

The McGrath Sales Process

Exchanging a Property

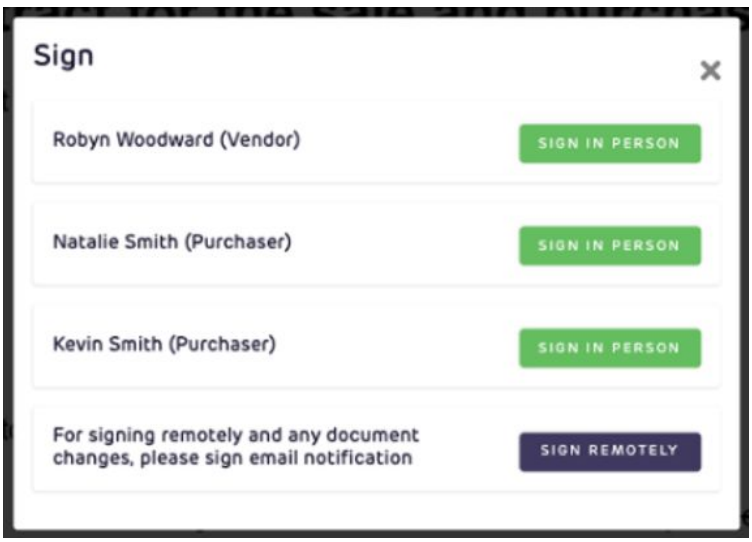
via Realtair - Sign

14. Download & print:

- The last two options in the icon bar are download and print

15. Signing:

- When you are ready to send the contract for signing or sign in person click on the signature icon
- Either send remotely or sign in person
- If Sign picks up you are missing any fields e.g missing purchaser 2 signature box you will see a warning pop up to remind you to add in that missing field

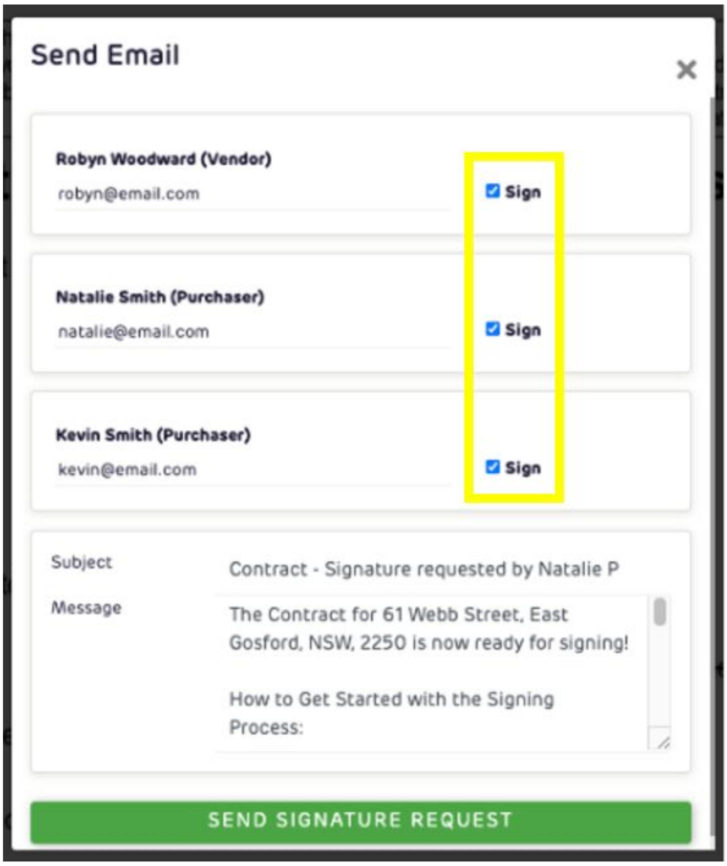


The McGrath Sales Process

Exchanging a Property

via Realtair - Sign

- To send remotely click on remote options, tick who you would like to sign and send signature request. Note: you can send to purchasers first then vendor if need be. You are not limited to sending to all parties at once.



- Once all parties have signed, all signatures will come back to one contract.

  Note: the contract is not yet exchanged at this point

McGrath

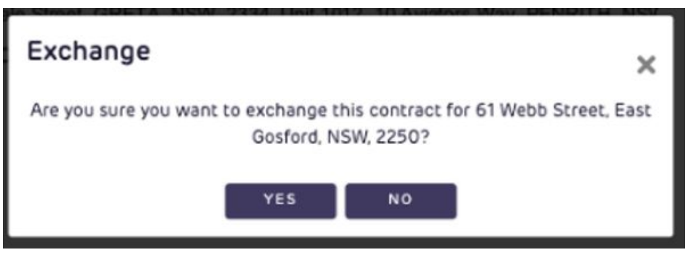
The McGrath Sales Process

Exchanging a Property

via Realtair - Sign

16. Exchanging:

- Once all parties have signed, the save button in the top right-hand corner will change to exchange
- When you are ready to execute the contract click on the exchange button
- You will see a warning message asking are you sure you want to exchange



- Click yes
- Once clicking yes, this will date the contract. Note: The date that will drop on the contract is the day you click exchange
- The contract is now dated and exchanged

The McGrath Sales Process

Exchanging a Property

via Realtair - Sign

17. Downloading exchanged contract

- Once you are ready to process the exchange you can click on the download button in the icon bar on your side hand side

McGrath

Exchanging with a Conjunction Agent

via Agentbox

You will probably experience a sale when there is a conjunctional agent involved. This could include any of the below scenarios:

- The listing was sold with an agent from another agency
- The listing was sold from an external referring agent
- The listing was sold with a Buyers Agent
- The listing was sold from a lead that was produced by a Lead Generation Company
- The listing was referred from McGrath Property Management

In any of these cases, we need to ensure we add this party as a 'Conjunctional Agent' in the 'Agents & Contacts' tab on the Listing card. Note: they will need to first be saved as a contact in the system if they aren't already an existing contact. (If PM referral, 'McGrath Property Management' is saved as a contact already).

You should also have a copy of the signed 'Conjunction Agreement' between the listing agents and upload this to the 'Other Documents' section in the 'Resources' tab.

Once added, you will be able to then process the exchange and determine the relevant splits.

If the property was already exchanged before adding the Conjunctional Agent, you will just need to go to the 'Commissions' tab and ensure the conjunctional agent is appearing under the 'Conjunction Fees' section. We will then need to chase their invoice before settlement. (Refer to Settlement checklist in following pages).

If McGrath is the Conjunctional Agent on an External Listing (with another agency)

The agent will need to sign a conjunction agreement that the main agent is meant to provide. So, if the other agency is advertising on their website as the main agent, they will need to prepare a conjunction agreement for the McGrath agent to sign.

We will then need to create a 'ghost listing' in Agentbox and upload the agreement to the 'Resources' tab.

When the property sells, we will need to exchange the property as normal and upload the signed front pages noting the agreed commission as per the Conjunction Agreement.

An email to your Settlements team will then prompt them to create an Agent invoice that we can send to the lead agent to pay us.

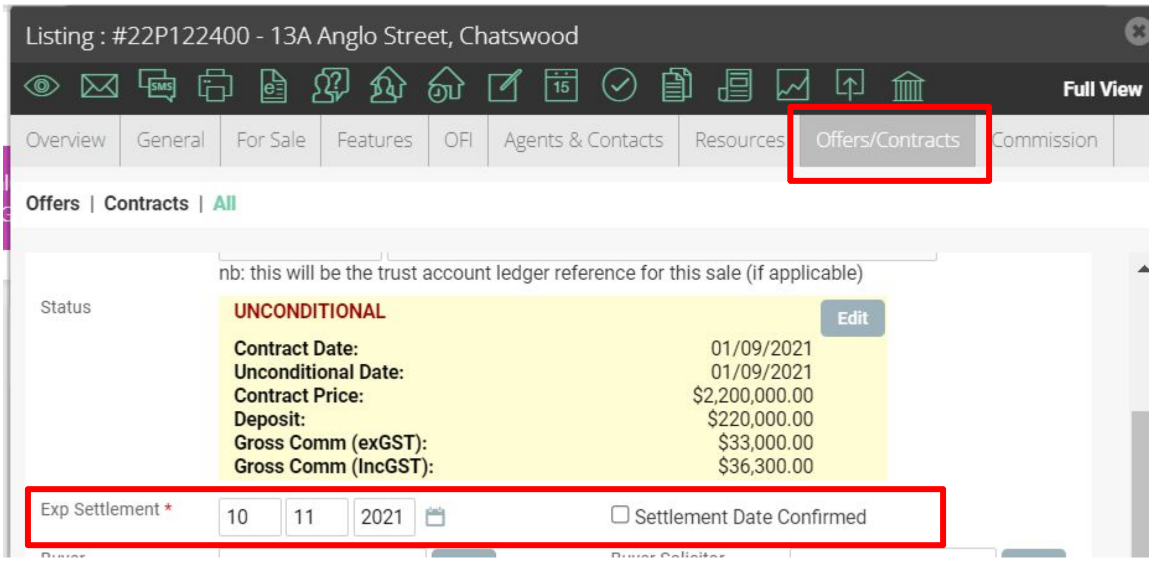
Preparing for Settlement

via Agentbox

When a property exchanges, we should diarise the settlement date as well as a week before settlement so that we can prompt ourselves to prepare for settlement.

To change the settlement date:

1. Go into the listing and click into the "Offers/Contracts" tab.
2. Beneath the yellow box you will see "Expected Settlement".
3. Here you can easily change the date.



The McGrath Sales Process

Preparing for Settlement

via Agentbox

1-2 weeks prior to settlement

Please use the below checklist as a guide to prepare for all settlements:

- ✓ Organise removal of sign board – email campaign coordinator
- ✓ Contact purchaser to arrange pre-settlement inspection
- ✓ Attend pre-settlement inspection
- ✓ Contact solicitors to confirm settlement time (add to diary when confirmed)
- ✓ Prepare Settlement Gifts for both vendor and purchaser
- ✓ Organize collection of keys, remotes, instructions manuals for settlement
- ✓ Prepare keys with McGrath key ring and gift box
- ✓ Contact vendor to confirm settlement details and procedures
  - This involves explaining deposit will be released once settlement is confirmed by solicitors. Advise of 2pm cutoff in case funds need to be released next business day.
- ✓ Contact purchaser to confirm settlement details and procedures
  - This involves explaining keys cannot be released until settlement is confirmed by solicitors. This avoids mishaps such as booking removalists too early
- ✓ Update forwarding address and details for vendors and update both databases

System Compliance to check in Agentbox

- ✓ Have vendor details and solicitor details been entered?
- ✓ Have purchaser details and solicitor details been entered?
- ✓ Is the correct agency commission entered and match the agency agreement?
- ✓ If there are multiple agents, have their splits been entered correctly? Both internal and external
- ✓ Is there a referral/external co-agent? If yes, have they been entered?
- ✓ Are there any outstanding marketing funds? Liaise with Campaign Coordinator (CC)
- ✓ Ensure all unused marketing components have been cancelled by emailing CC.

Documentation Compliance (Have the following been uploaded to Agent Box?)

- ✓ If agent is "Internal Conjunction (aka. Contractor Agent)", has their invoice been uploaded?
- ✓ If there is external agent, has their invoice been uploaded?
- ✓ Have vendor bank details been provided?
  - Send "Settlement Information Request"
  - Or receive email from vendor (verbally verified with vendor)
- ✓ Upload all information to Agentbox (labelled clearly)

Preparing for Settlement

via Agentbox

<u>1-2 weeks prior to settlement</u>

If deposit is over $250k, the deposit will be invested, additional information required:

- ✓ Has purchaser bank details been provided?
    - Send "Settlement Information Request"
    - Or receive email from purchaser (verbally verified by purchaser)
- ✓ Has either vendor or purchaser Tax File number been provided (Only 1 TFN is required from either party to be able to open an interest bearing account).
- ✓ Upload all information to Agentbox (labelled clearly)

If early release of deposit is required:

- ✓ Have you forwarded Vendor request of the release including the amount to Settlements Team?
- ✓ Have you provided payment method to Settlements Team?
    - Either bank details for EFT
    - Payee name if cheque is requested
- ✓ Have you forwarded purchaser authority to Settlements Team?
    - Either the page of the special condition on contract
    - Or an email from the purchaser solicitor to authorise the release

If we are releasing our commission, additional information required:

- ✓ Have you forwarded information to protect our commission to Settlements Team?
    - Either an email from vendor Solicitor undertaking fees to be paid at settlement
    - Or completed and signed irrevocable authority form from vendor

Note: Any documents that are uploaded to the Documents section in Agentbox should be labeled very clearly so that the Settlements team can easily access the required information without having to click into every single document!

The McGrath Sales Process

Preparing for Settlement

via Agentbox

<u>**Settlement Day Checklist**</u>

Before Settlement

- ✓ Ensure that "Settlement Information Request Forms" have been completed by vendors and purchasers and uploaded to Resources tab in Agenbox
- ✓ Chase order on the agent vendor solicitor/purchaser's solicitor and upload to Agentbox

Once Order on Agent is Received

- ✓ Do both sides solicitor details on system match the Order on the Agent?
- ✓ Upload the Order on the Agent to Agent Box
- ✓ **Send order on the agent to settlements Team** (otherwise Settlements will not know the property has settled) and confirm that all details are in Agentbox
- ✓ Agent to call the purchaser and vendor to confirm settlement and congratulate them
- ✓ Confirm property has been settled in Agentbox (click **SETTLE** in Offers/Contracts tab)
- ✓ Arrange handover of keys and gifts
- ✓ Dismantle, scan and upload any additional files in Agentbox