

Referral Management System (“RMS”)

A quick overview how to register and review your buyers/sellers in RMS

RMS Overview

RMS is a unified system that allows our partners to easily register a buyer/seller and then let the HomeAdvantage team refer them to a network real estate agent. Agents update the system so real-time information is available in RMS.

To get started, sign-in using your credentials at:

<https://yourprefix@myhomeadvantage.com>

Questions – email:

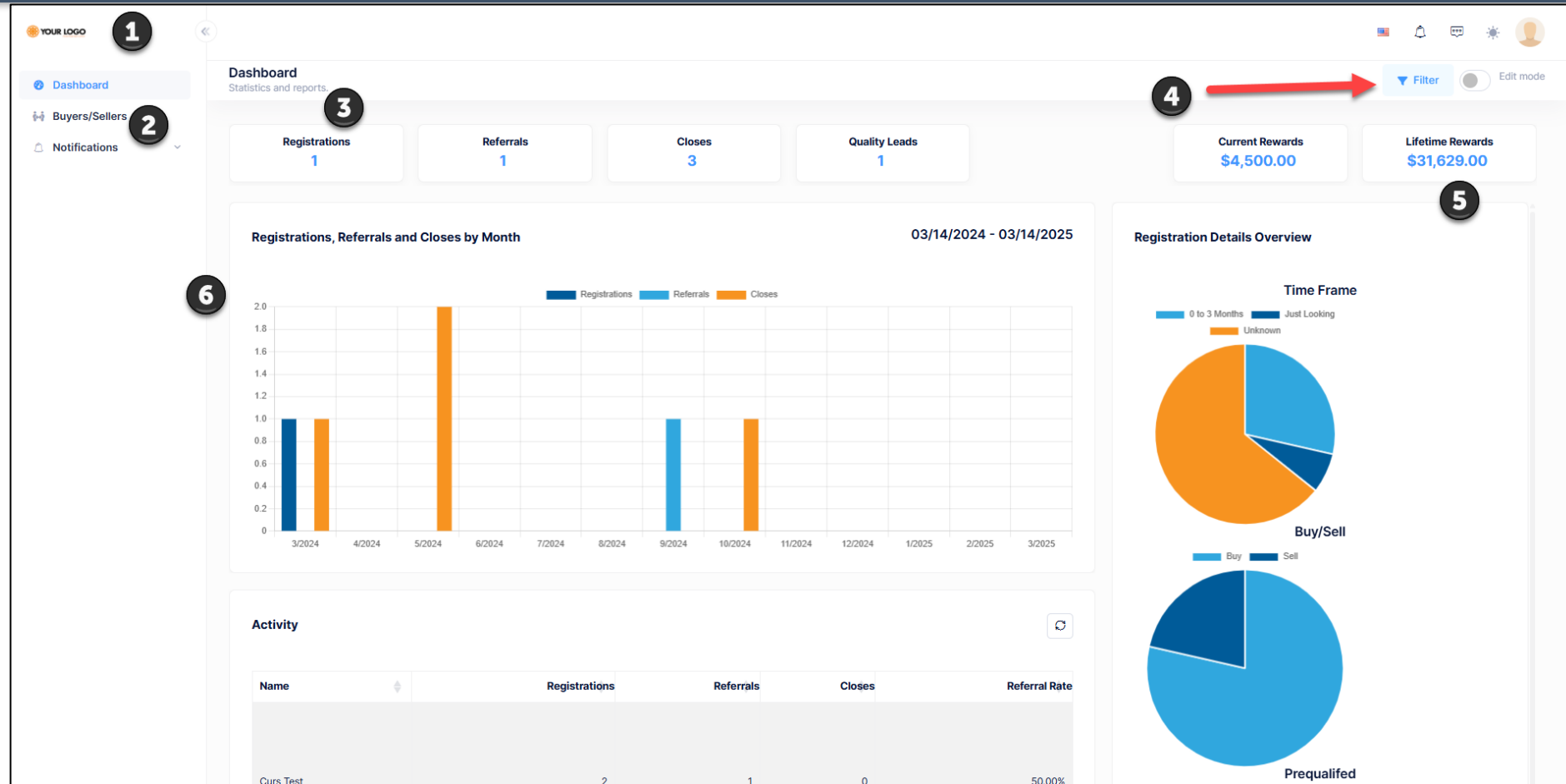
TechSupport@HomeAdvantage.com

Dashboard

Your RMS Dashboard provides a quick summary of stats related to registrations and referrals.

1. Your logo will be displayed
2. Quick navigation links (by default, you'll land on the Dashboard).
3. Summary statistics - filter to choose the time frame.
4. Rewards paid (or savings) related to your buyers/sellers based on the filter selection.*
5. Lifetime rewards!*







*Note: Depending on your program, rewards may not be accurate.



Buyer/Seller Screen

1. Use this button to begin the registration process. (see slide 6)
2. Go to the resource center to learn more about HomeAdvantage and our solutions.
3. Buyer (purple house); Currently referred to an agent and house hunting.
4. Seller (green yard sign); Currently under contract
5. Buyer (purple house); not yet assigned to an agent
6. Quick email button – this email address can be used to send an email or attachment directly to the specific opportunity – including any attachments.

The screenshot shows a web browser window with the URL <https://plcu.myhomeadvantage.com/Dashboard/Members>. The page title is "Buyers/Sellers" and the subtitle is "View Buyers/Sellers Activity." The page features a navigation menu on the left with "Dashboard", "Buyers/Sellers", and "Notifications". The main content area includes a search bar, a "Show advanced filters" dropdown, and a table of buyers/sellers. The table has columns for Name, Last Activity, Assigned agent, Phase, Registered by, Referred by, and Concierge. There are three entries in the table, each with a quick email button. The page also includes a "+ Register Buyer/Seller" button and a "Resource Center" button. The footer text is "HomeAdvantage Credit Union Standard | v5.3.0.7 [20250225]".

Name	Last Activity	Assigned agent	Phase	Registered by	Referred by	Concierge
 Global226 Test226	2 months ago	Captain Crunch	Referred House Hunting	02/26/2024 Barry Testplumb	02/27/2024 Barry Plumb	Member Services 
 Global226 Test226	2 months ago	Captain Crunch	Under Contract Closing in Process	02/26/2024 Barry Testplumb	02/27/2024 Barry Plumb	Member Services 
 Barry TestPlumb	2 years ago	Unassigned	Registered No Contact	09/07/2023 Barry Testplumb		Member Services 

Click on the Name to launch the Detail Screen

Detail Screen

1. Name and date opportunity created (also shows phase and milestone).
2. Note that this person is buying and selling (click on tab to view the other opportunity).
3. Note created when the opportunity is registered.
4. Milestone (see list of possible milestones)
5. Details (including assigned agent (see details in #7 below)).
6. Manual and automated system tasks are logged. Tasks assigned to the agent include notifications via SMS/email and phone for mobile app users)
7. Contact details
8. Notes – you can view notes from agents/Mission Control and create notes
9. Documents – you can view docs (e.g., RMS Closing Worksheet) or upload (e.g., pre qual letter).

The screenshot displays a web application interface for a real estate opportunity. The main heading is "Global226 Test226-02/26/2024". Below this, there are tabs for "Buy" and "Sell". A progress bar shows milestones: "Accepted", "Reached", and "House Hunting". A note mentions a "20% of Agent commission" and a "Cash Reward at closing". There are buttons for "Temp Snooze" and "Upload Documents".

The "Concierge details" section includes a table with columns for "Agent", "Subject/Type", "Due date", "RelatesTo", and "Assigned to".

The "Details" section (callout 5) shows property information:

Property Address	1234 e street, chandler AZ 85225
Price range	350,000 - 450,000
Time frame	Unknown
Areas of interest	85085, Phoenix, AZ
Mortgage status	Prequalified
Prequalified amount	\$400,000
Prequalified date	04/02/2024

The "Contacts" section (callout 7) shows contact information for the agent and lender.

Agent	Lender
Captain Crunch (303) 834-7117 (303) 834-7117	Lender TESTName Prime Lending Credit Union (555) 555-5555
REMAX North	test@remax.com

The "Notes" section (callout 8) shows a note with a "Created" date of 03/11/2024.

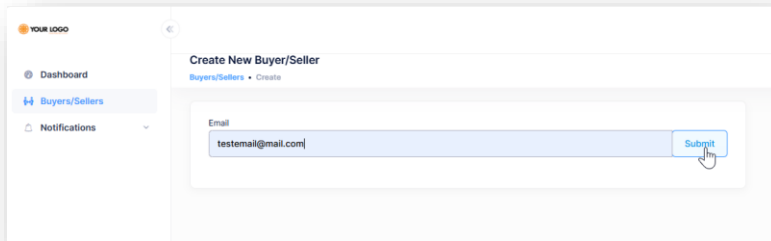
The "Documents" section (callout 9) shows a list of documents with columns for "Actions", "Name/Date", and "Attachment type name".

Actions	Name/Date	Attachment type name
View	Global226Test226_CaptainCrunch_worksheet_30082024_043916.pdf Created: 08/30/2024 9:39 AM	HomeAdvantage Closing Worksheet HomeAdvantage Closing Worksheet
View	Global226Test226_CaptainCrunch_worksheet_30082024_043916.pdf Created: 08/19/2024 2:00 PM	Buyer Representation Agreement Buyer Representation Agreement

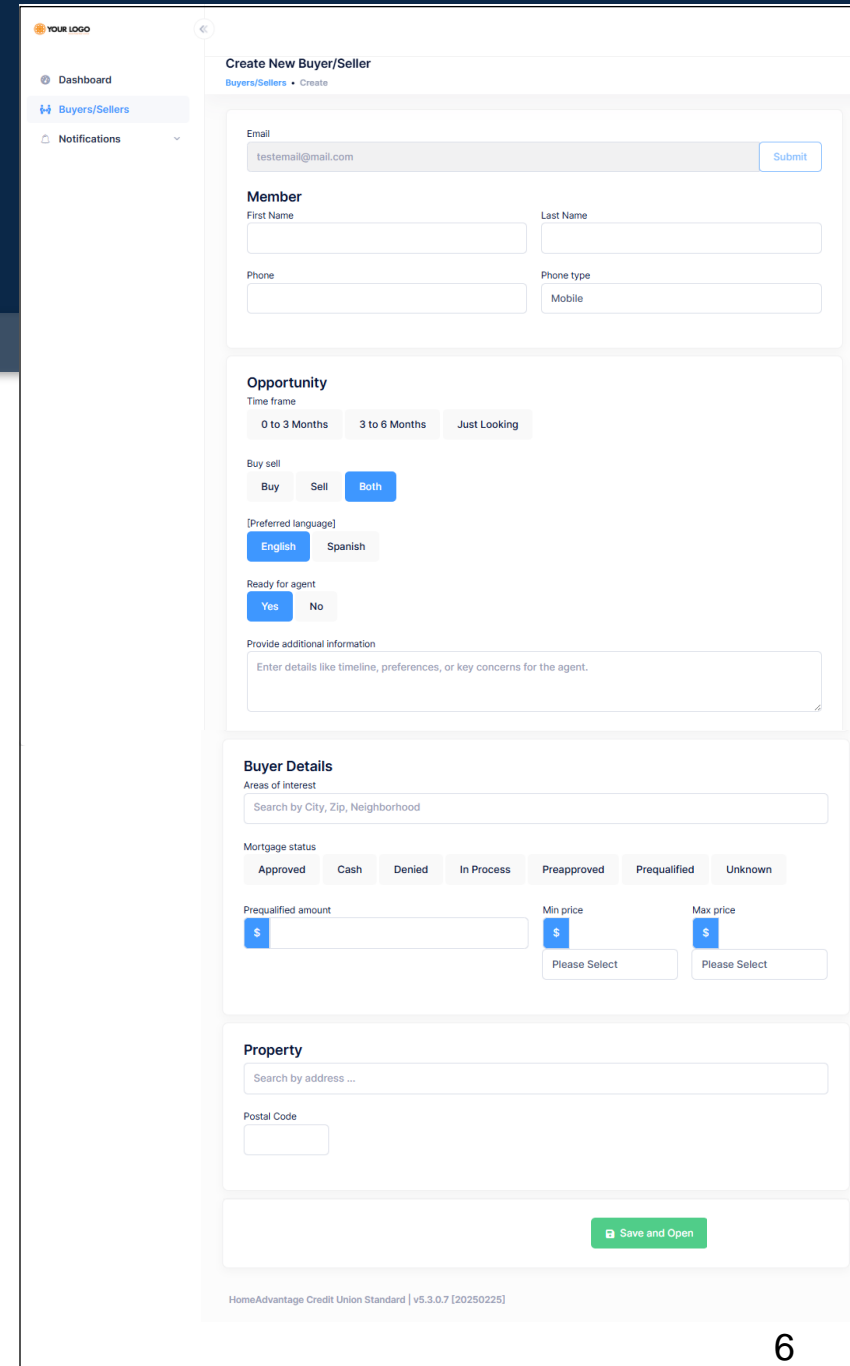
Register a Buyer/Seller

Two step process:

1. Enter an email address to validate it.
2. Then enter details.
 - A. Email address
 - B. Contact information
 - C. Timeframe and other details
 - D. IMPORTANT: include details and additional information that will help the agent with their first call.
 - E. Provide property search or sale information (if they're selling).



A screenshot of the 'Create New Buyer/Seller' form. The 'Email' field contains 'testemail@mail.com' and a 'Submit' button is visible to the right. The form is part of a dashboard with navigation links for 'Dashboard', 'Buyers/Sellers', and 'Notifications'.



A screenshot of the 'Create New Buyer/Seller' form, showing the details step. The form is divided into several sections:

- Member:** Fields for First Name, Last Name, Phone, and Phone type (Mobile).
- Opportunity:** Time frame (0 to 3 Months, 3 to 6 Months, Just Looking), Buy sell (Buy, Sell, Both), Preferred language (English, Spanish), Ready for agent (Yes, No), and a text area for 'Provide additional information'.
- Buyer Details:** Areas of interest (Search by City, Zip, Neighborhood), Mortgage status (Approved, Cash, Denied, In Process, Preapproved, Prequalified, Unknown), Prequalified amount, Min price, and Max price.
- Property:** Search by address and Postal Code.

A 'Save and Open' button is located at the bottom right of the form. The footer text reads 'HomeAdvantage Credit Union Standard | v5.3.0.7 [20250225]'.