Get Zapped!
Quick Reference Guides

Quick Reference Guide: Zap™ Agent Insights

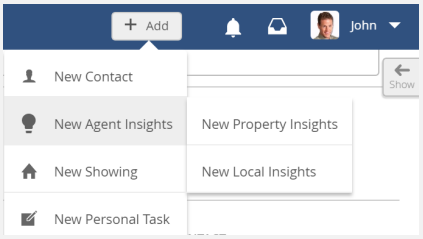
Add insights for properties you've toured and highlight your local knowledge.

ABOUT INSIGHTS

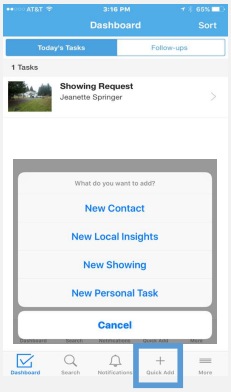
WHAT: There are two types of Agent Insights:
1) Property insights, which are insights into properties you've toured or shown, and,
2) Local insights, which are about your local area, including events, markets, appeal, etc. where you want to showcase your knowledge of the area.

WHY: Add them to create new content for both your Agent Website and your company's page and MLS listings, and, more importantly, to help potential clients understand your unique insights into properties and areas.

WHERE: To add insights, click the +Add button at the top right of your Zap dashboard.



ON-THE-GO: Add insights using the mobile Zap CRM, click +Quick Add, click either New Local Insights or New Showing.



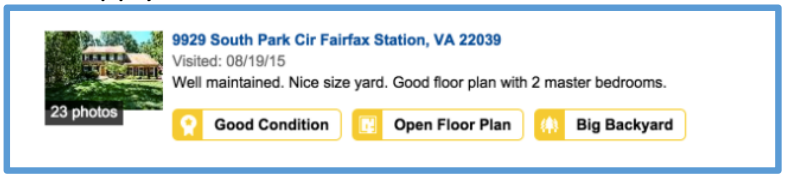
HOW: For Property Insights, be aware of how to write a great insight without violating the Truth in Advertising laws. Learn more about effective online marketing: National Association of Realtors

Q. When can I write Property Insights on properties so that they will display on my website?

A. You can write insights on properties with either Active or Active Contingent status, which Zap shows as Pending.

Q. What methods can I use to share my knowledge about the property?

A. You can select Quick Tags, write comments, or both. You can write comments that give more detailed insights about the property and the neighborhood, things that are not obvious from the pictures or the listing agent's description. You can also select up to three Quick Tags that apply.



Q. What should I do to ensure Zap finds the property I want to write about?

A. Make sure…

- *The property is located within the Service Markets you cover.*
- *The property is still Active or Active Contingent status in the MLS.*
- *You are typing the correct address or MLS number.*

Q. What are a few quick tips to help write meaningful Local Insights?

A. Some tips include:

- Be balanced! Describe cities and neighborhoods. Zap lets you describe both.
- Be specific! Share details about the climate, local events, access to shopping and other conveniences.
- Be unique! Use your own words, and let your personality shine through.

Remember, when you write Local & Property Insights, they show off your knowledge in multiple places! On your Website, the Company website, Property Description pages, and Search Results pages.

Quick Reference Guide: Zap ® Consumer Website & Mobile App

A great solution for your consumers.

ABOUT THE CONSUMER WEBSITE & APP

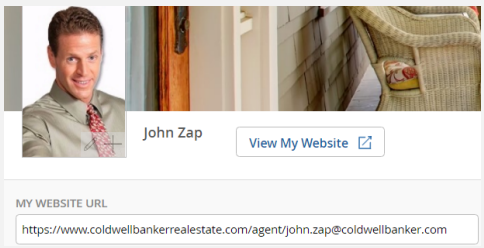
WHAT: Zap offers a desktop website, a mobile website and a mobile app consumers can use to search and save properties.

HOW DOES IT WORK?

Once an account has been set up, either when an agent adds the account or when a new Broker lead comes in, the consumer can save searches and properties that will show up on any device they use.

WHERE IS MY REFERRAL LINK FOR MY WEBSITE & APP?

After you log in to Zap, you can find your website or mobile app referral link in the My Website page, listed under your picture & name in the upper right-hand corner of http://new.myzap.com



WHY DOES MY CLIENT SEE ME AND ANOTHER AGENT WHEN THEY GO TO THE WEBSITE?

Contacts can be tied to more than one agent for two reasons. Either you are the secondary agent for that contact, meaning you added the contact AFTER another agent in your company accepted the lead, or the Contact has searched and requested information in Service Markets you do not cover. You can only show as the agent representing the properties from the MLS your broker has signed IDX agreements with.

Q. Where can consumers search for properties?

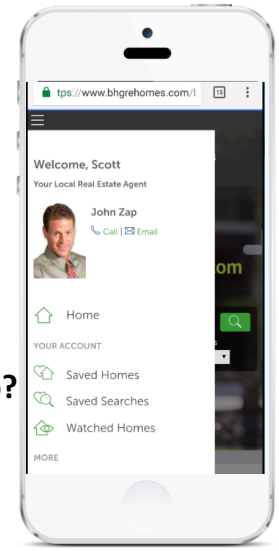
A. ConsumerS can search anywhere we have a brokerage that has signed an IDX agreement with an MLS. We cover all the major markets for all brands. Zap at its core is a collection of inter-connected sites that appear as one site to consumers.

Q. Can I set up searches and alerts anywhere? If I share my referral link with a client, do I show everywhere?

A. Zap at the core is a website where MLSs, the brokers and Zap have signed agreements to show properties from those MLSs. That means you will show only in those Service Markets where your brokerage has signed IDX agreements with the local MLSs. It also means the areas the MLS(s) cover will be the Service Markets for which you can set up listing alerts for your clients.

Q. What's the best way to share my mobile app?

A. The best way is to first add the contact, then on the Contact Profile page, click the MORE button and select Share My Mobile App Link. This ensures the contact is yours, and that you will show as their agent once they download the mobile app.



Q. How often is the Consumer Mobile App updated in the app store?

A. For both Android and iPhone, the app is updated frequently. Encourage your clients to check for updates.

Q. When I set up a listing alert, will my Contact be notified on the Mobile app?

A. Yes! If the consumer has allowed notifications, they will be notified when you set up alerts for them.

Q. Can I connect other ratings & reviews to my website?

A. You can either use the Resource links, or you could copy and paste into other reviews from other sites into the Testimonials section of My Website. Remember, you can only have one or the other – Reviews OR Testimonials. Using Agent Reviews provides more ways to connect to your Contacts, and is an easy way to add additional content to your Agent Website.

Quick Reference Guide: Zap® Follow-up Plans

Let Zap remind you of the next step!

ABOUT FOLLOW-UP PLANS

WHAT: Follow-up plans are reminders to stay in touch with clients based on your or your company's timeframe and methods. They are flexible, meant to match up with the relationship you have with your contacts and help you stay in touch with them.

TouchPoint Emails

Can be an automated or manual email using Email scripts

TouchPoint Notes

Allow you to skip steps by providing notes

TouchPoint Calls

Use pre-defined Call Scripts that you can change on the fly

Change Plans

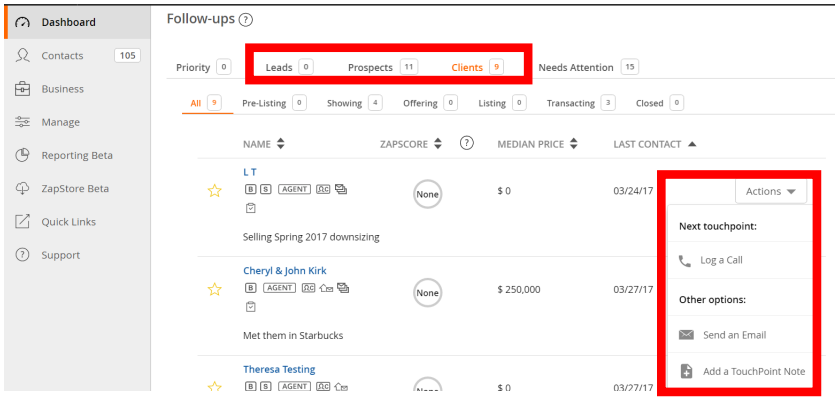
Match the relationship you have with your Contact

Q. Are all follow-up plans automated?

A. Plans use what's called TouchPoints. There are three types of TouchPoints, Manual Email, Phone Call or Automated Email. If each Touchpoint was an Automated Email, then it would be an entirely automated plan. However, most plans use manual TouchPoints (email or phone). This means Zap will remind you of when to follow up, but you would have the flexibility to change the script to meet the current need of the consumer.

Q. Where does the next TouchPoint step show?

A. They show in the Follow-ups section of the Dashboard, under Leads, Prospects or Clients. You'll find the next step listed under Actions.



Q: Can I change/customize a script?

A. Yes! That's what makes Follow-up plans so flexible. If you need to add something to the script or change the script, you can do that before you send it.

Q. Can we create our own scripts and plans?

A. Yes! Both agents and companies can create their own scripts, then assign those to their own defined plans. You do that through the Manage link on the left.

Q. I thought putting leads on a plan would keep me in the green. Now it's saying I need to update leads. Why?

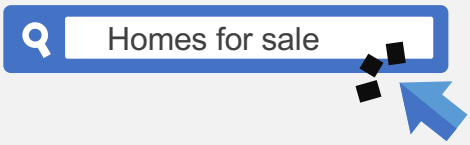
A. Putting a lead on a plan counts as an update, but you need to continue to move the plan along. If the dates between touchpoints match your reporting intervals, and you do the steps, it should keep you green.

Quick Reference Guide: Increase Your Zap™ Website SEO

Drive more consumers to your site.

ABOUT SEO

WHAT: SEO stands for Search Engine Optimization and it's both what the developers do in the programming of the Zap site, and what you can do to attract more consumers to your site via search engines like Google, Bing, Yahoo, etc.



HOW: The two most important things you can do to increase SEO is provide as much information using keywords and phrases on your website that your consumers use during their search, and then add as much unique content like Property and Local Insights and Agent Reviews to your Zap agent website. Remember everyday activities like Showings, Reviews and Insights appear on your website.

WHERE: You should post links to your Zap website on Facebook, LinkedIn, Twitter, Google+, your own blog, and any site on the Internet where lots of people visit. Remember to post not only links to your site, but also links to local insights, property insights and even properties!

If a link does not include your email address, add ?referredByAgent=yourzaplogin where your Zap login is your login to the end of any link.

Q. What are three things I can do to increase SEO?

A. First, make sure you've added your About Me statement. This statement is indexed by search engines and should have key phrases consumers use to find you. Next, make sure you add Property and Local Insights. This will create unique content search engines love. Finally, make sure you do each of the steps outlined in the Agent SEO Playbook found in the My Website page in Zap. These will ensure you have all the components that make for increased SEO.

Q. What does "without masking" mean?

A. This means your domain name / vanity URL will not 'hide' the actual Zap links. It's important when you forward your domain, you do it WITHOUT masking because this ensures Zap can track your clients and their activities while on your site.

Q. Can I add my Google Analytics code?

A. At this time, only the company website accepts GA codes. Agent websites do not have a Google Analytics tracking option.

Q. How can I share a listing on Facebook?

A. First use your website referral link, then search for the listing. Once you find the listing, click the Facebook icon. This will take you to post to your Facebook account and to your Timeline or other Facebook pages.

Quick Reference Guide: Zap® Listing Alerts

Driving consumers back to the Zap Website

ABOUT LISTING ALERTS

WHAT: New Listing Alerts are emails sent on your behalf to your customers to let them know about new listings that match their search criteria. The email prompts them to click back to your website to learn more about the property, where they have the opportunity to request a visit with you or ask you a question. They can also just respond to the email – easy access to you!

WHY: Set up listing alerts for clients once you have an understanding of the area and types of properties the contact is interested in.

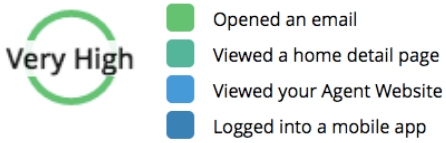
HOW: To turn on alerts, you would sign in as the contact, search for properties using the search criteria they have given you, click the Recommend Search button, then click Email this Recommendation.

HOW DO YOU KNOW WHICH ALERTS YOU'VE SETUP?

For alerts you've set up, you will see the agent banner at the top of the alerts. Those without a banner are alerts consumers have set up themselves.

Q. Why do I want to set up listing alerts on Zap instead of my MLS?

A. If you set up alerts on Zap, you can see if the client views homes, saves searches or creates searches themselves. With the ZapScore℠ you can also see if the client is viewing your website or using the mobile app, providing you greater insight into what your client's preferences are.



Also, Zap listing alerts are much easier for consumers to change, update or create than most MLS portal software. Zap also makes it easy to create broad searches for consumers so they get a good number of alerts instead of just a few.

Q. How frequently are alerts sent?

A. Twice a day, once in the morning, once in the afternoon, if there are new properties that have come on the market that meet the search criteria.

Q. How do auto-drip notifications help?

A. If your Contact doesn't save a search, your website can see what they're interested in, and set them up for a modified version of Listing Alerts (fewer emails), prompting them to come back to your website to save a search that matches their needs.

Q. I want to encourage rental leads to consider the option for buying. Can I set up alerts based on a monthly payment range instead of a price range?

A. Yes. Many renters may not realize there are properties available with monthly payments lower than some rental properties. To set up an alert based on monthly payment, click the MORE FILTERS button, then click **City** in the **Create Advanced Search** section. On the City form, in Home Information, you can click **Switch to Monthly Payment**, select the amount, then run the search, then Recommend it.

Quick Reference Guide: Zap® Mobile CRM

All your Contacts in the palm of your hand!

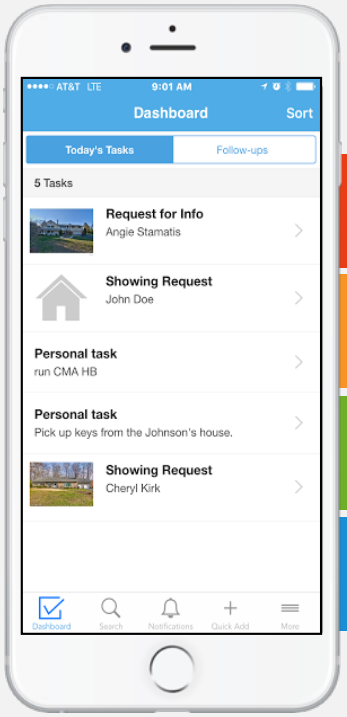
ABOUT MOBILE CRM

WHAT: The Mobile CRM is your 'on the go' Zap system. With it you can

- Add Contacts
- Update Broker Leads
- Add Property Insights
- Text your Contacts
- Add Local Insights
- Move Follow-up Plans Along
- Complete Showings
- Add Tasks
- Complete Listing Appointments
- Respond to Requests for Info
- Review Lead Notifications
- View Contact Profile Pages
- View Contact History
- Add Tasks
- Send Emails
- Use Phone Scripts
- Log a Call
- Add a TouchPoint Note
- Add a Profile Note
- Change the Relationship

And just about everything you can do on the desktop version, with the exception of updating account settings.

There is no cost for this app, and it's updated frequently with new features.



Q. How do I log into the Mobile CRM?

A. You use the same login as you use for the Desktop version and the same login you use to get into your brand portal.

Q. What phones does the app work with?

A. The app works with either Android or iPhone smart phones with a recent update to the phone's operating system.

Q. How often is the app updated? Will I get a notice?

A. It is updated typically at least once a month. You may not get a notification on your phone, but if you view the app store page for the app, it will indicate if there is an update. You should check the app store frequently for updates.

Q. When I add a contact or update information how long before it shows on the Desktop version?

A. Because the phone is using the 'cloud' to store your contacts, as long as your phone is connected to the Internet, the updates should be immediate. If you are not seeing updates, make sure your phone is not on Airplane mode or and is connected to the Internet.

Q. What can I not do on the Mobile CRM?

A. You cannot change any account settings or update your Agent Website. Those functions need to be performed on the Desktop version of Zap.

Fastest way to add Property Insights!

Texting counts as an update to leads

Move follow-up plans along

Add new contacts quickly

Quick Reference Guide: Zap® Seller Tools

Encourage more sellers to use Zap!

ABOUT SELLER TOOLS

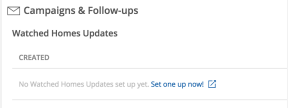
WHAT: The consumer website offers a link to Seller Tools with three features:

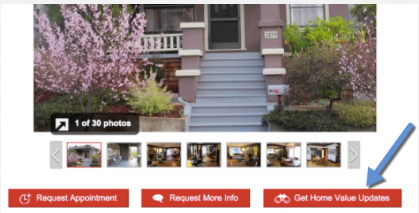
1. Home Value Estimates
2. Interactive Pricing Tool*
3. Contact Agent

WATCHED HOME UPDATES:

These are weekly emails sent to a potential seller that show the 10 most recently listed properties similar to their property. Potential sellers can use this email campaign to keep track of any off-market home and receive weekly updates on similar properties.

HOW: To set up Watched Homes Updates for sellers, from their Contact Profile, go to Campaigns & Follow-ups, click Set one up now. Enter their address in the Search bar, click Get Home Value Updates.





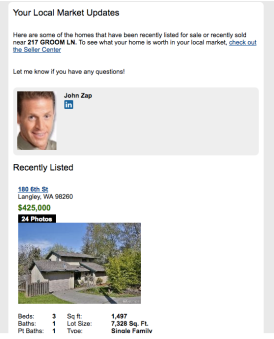
***NON-DISCLOSURE STATES**

If you work in these states, the Interactive Pricing Tool will not display comparable sales, but there still may be Home Value Estimates available on properties:

- Alaska
- Idaho
- Indiana
- Kansas
- Louisiana
- Maine
- Mississippi
- Missouri
- Montana
- New Mexico
- North Dakota
- Texas
- Utah
- Wyoming

Q. How do Watched Home Updates help potential sellers?

A. Watched Home Updates can give potential sellers more insight on what to expect when selling their own property. Potential sellers will receive details about features and pricing of homes similar to their own – information that can help them understand what's ahead in their listing process.



Q. How do Watched Homes Updates help agents?

A. This is a great feature to nudge a curious potential seller toward reaching out to work with you. The Contact will receive details about similar properties with the agent's contact information included. Every email has a link to request information from an agent or the option to simply reply to the email directly with their questions. Watched Home Updates can play a key role in turning a Contact into a Listing Client.

Q. How do I make sure the consumer sees me when sending a link to the Sellers Tools page?

A. Add this parameter to the end of the link (this will remove the Find an Agent link): ?referredByAgent=yourzaplogin

B. Once you've added, it will look something like this:

https://www.era.com/selling-a-house?referredByAgent=john.zap@brand.com

Q. Besides the Interactive Pricing Tool, is there another place to see recently sold comparables on the website?

A. Yes, locate the Recently Sold Homes Nearby section on the Property Details page.

Recently Sold Homes Nearby

Address	Price	Sq. Ft	Property Type	Beds	Baths
3704 N Elm St, Denton, TX	$66,055	768 sq. ft.	Single Family Residence	2	1
3704 Shadow Trl, Denton, TX	$155,000	1,891 sq. ft.	Single Family Residence	3	2
2213 Bolivar St, Denton, TX	$40,000	776 sq. ft.	Single Family Residence	2	1
608 Driftwood Trl, Denton, TX	$57,249	949 sq. ft.	Single Family Residence	0	1
2209 Southway, Denton, TX	$147,000	2,025 sq. ft.	Single Family Residence	4	3

Show More Sold Homes

Quick Reference Guide: Working Your Zap® Database

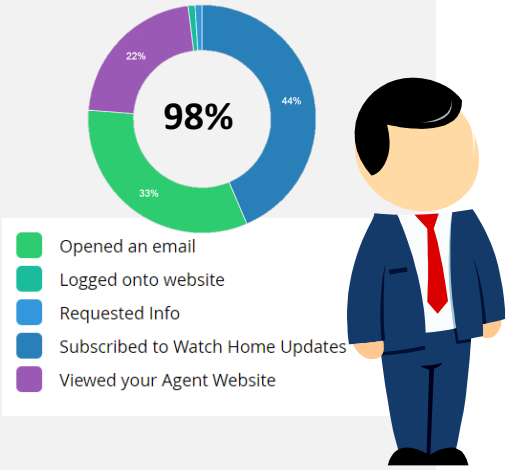
Make sure you're ready for lots of leads!

ABOUT CONTACTS

WHAT: Contacts are those leads you receive from your broker and those you add to Zap. The Contact Profile page keeps track of everything the client does, and all updates and communication you have with that contact.

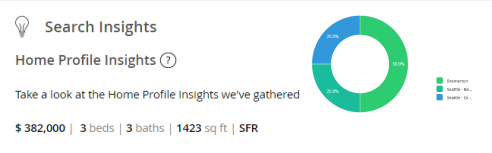
ZAP MAKES RESEARCHING EASY!
There are three features in the Contact Profile page that make researching a Contact quick and easy:

1. **The ZapScore℠**
   The ZapScore shows you what the contact is doing on Zap, including if they are using the mobile app. If you have more than 100 ACTIVE contacts, you will have a score, otherwise the score is a range.



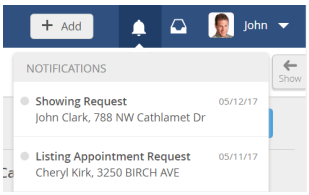
2. **Relationship**
   This field tells you instantly what kind of relationship you have, be it a Showing Client, Unresponsive Prospect, New Lead, etc. The Relationship field changes based on what the contact does, or how long they are on Zap.

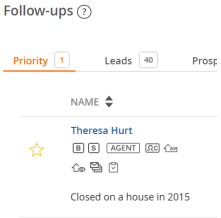
3. **Search Insights**
   These provide a collective insight into what type and price range the Contact has searched for.



Q. Where do I find new broker leads?

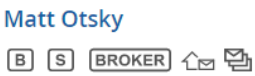
A. There are three places:
   1. Under the Bell icon (Zap Notifications)
   2. Under the Priority column in the Follow-ups section
   3. By using FILTERS, and filtering by Date Added





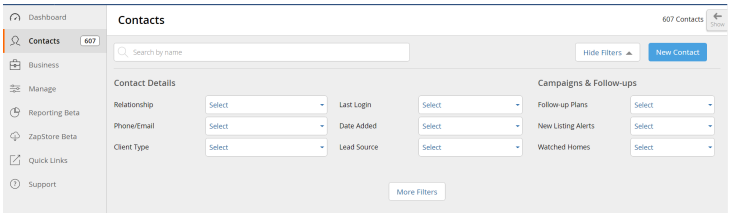
Q. How do I know if the lead is a broker or agent lead?

A. The 'badges' underneath each contact's name shows what kind of contact it is, if it's on a plan, signed up for listing alerts, etc. You can hover over those badges to get the information.



Q. How can I find a list of contacts who are not on follow-up plans or might have logged in recently to Zap?

A. You can use the Contacts FILTER option to find just about any type of contact. Click on the CONTACTS link, then click the FILTER button to see what filter options are available. You can even find contacts currently signed into Zap!



Q. What do you recommend I do with new leads?

A. If you have set the Lead and Notification setting to send an automatic Welcome Email, the next step is to send them a link to your Mobile App using the MORE button on the Contact's Profile page. From there, if they have not requested showings or information yet, consider putting them on a follow-up plan for New Leads. Then check the Contact the next day to see if they are searching for properties. If so, set them up on listing alerts for the types of properties in which they show an interest.