

Partner Network Process Flow

Step 1) CSC will send Tour Request to your email. Sample below:

Hello Kay:

CORT has a rental tour in Minneapolis, MN, USA for 2/12/2020. Are you available to cover this tour?

The Assignee stated they are looking for:

Type of Housing: Type of Housing: Apartment, Condo/Townhome

Number of Bedrooms: 2 Number of Bathrooms: 1-2

Monthly Housing Budget: \$1000.00 - \$2000.00

Desired Commute Time: 40 minutes

Employer Name: Target Pets: Cats: 1 Dogs: 1

Market Challenges: Low Credit Score

Approved for:

Homefinding Tour - Full Day

Preferred Tour Date: 2/12/2020 Secondary Tour Tour Date: 2/13/2020

Move In Date: 4/29/2020

Please let me know if you are available for this assignment.

Thank you,



Luke Raisor
Area Manager, Destination Services
CORT, A Berkshire Hathaway Company

15000 Conference Center Drive, Suite 400

Chantilly, VA 20151

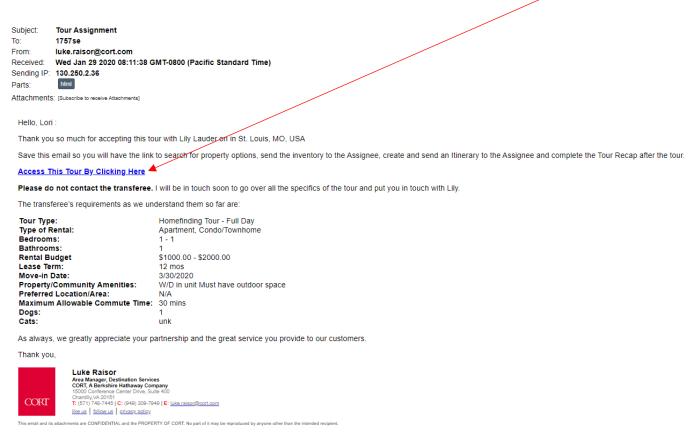
T: (571) 748-7445 | C: (949) 309-7949 | E: <u>luke.raisor@cort.com</u>

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To accept the tour, please respond to the email confirming your acceptance.

Step 2) Once you accept the tour, the CORT CSC will send you the Tour Assignment Link. Click on the link to access your active CORT files:

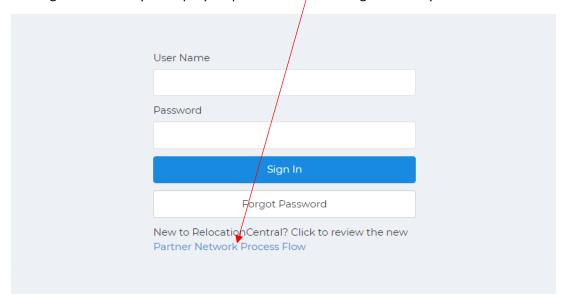


All tour payments are processed upon completion of all tour forms and approval of invoice. Please also be sure to source CORT on the renter's guest card at CORT referred properties

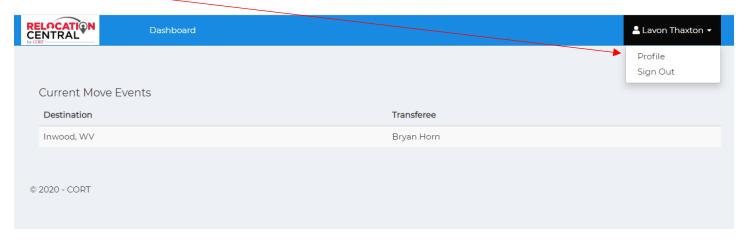
When you first log on you will be prompted to enter the following log in credentials:

- **Username:** your email address
- Password: cort
 - o You will be prompted to change your password the first time you log on.

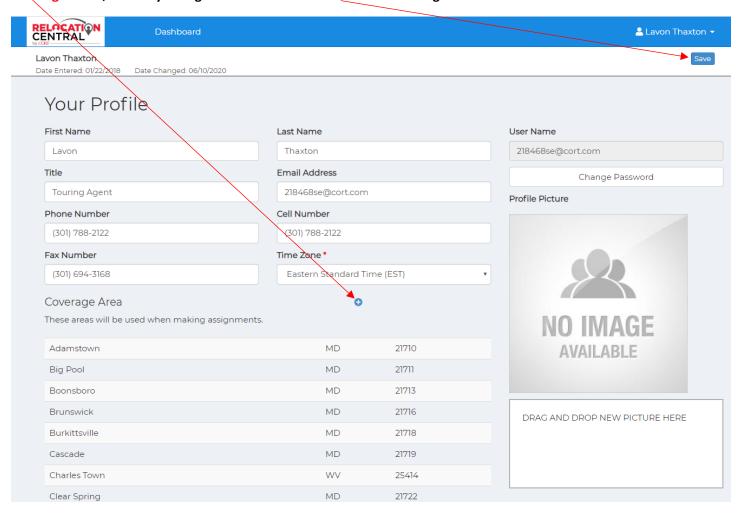
At any time, you may click on the **Partner Network Process Flow** on the log in screen to access this PDF that you are viewing which shows you step-by-step instructions on using our new system:



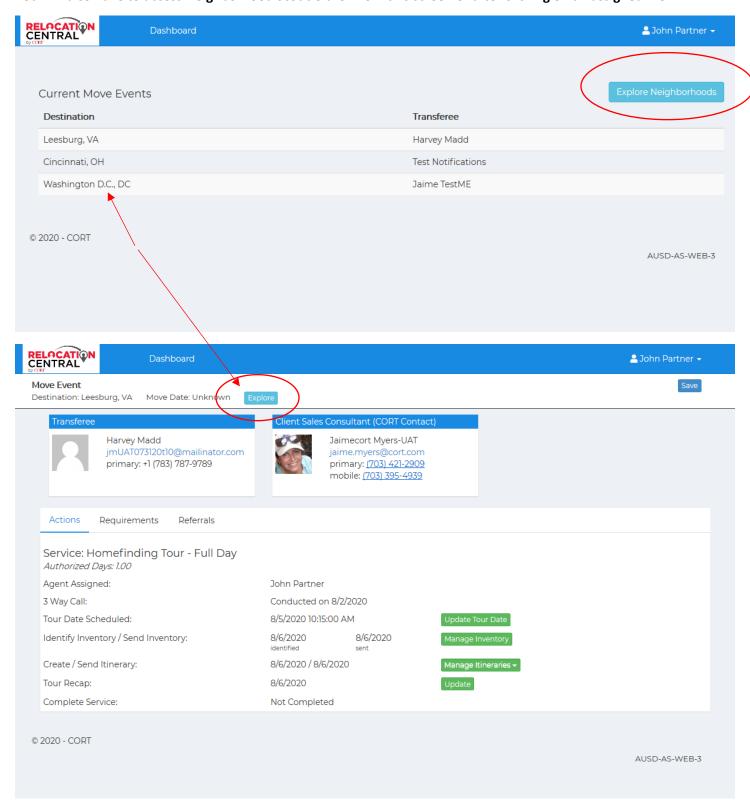
On this screen you can update your information at any time by clicking on your name at the top right and then clicking on "Profile".



Here you can update/change your password, update your main phone number and/or cell number, add or delete coverage areas, etc. Any changes will need to be saved before moving forward.



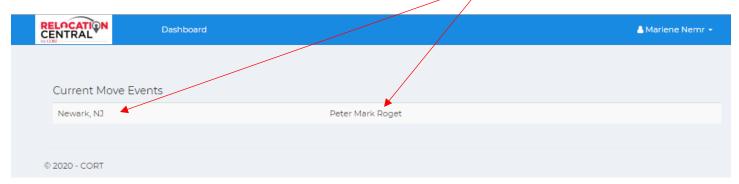
You will also have to access Neighborhood Scout either from this screen or after clicking on an assigned file:



You will want to use Neighborhood Scout for your own knowledge regarding your customer's destination location and to help guide you to the perfect locations for each specific customer. Please see details on navigating this robust website at the end of this document (Navigating Neighborhood Scout).

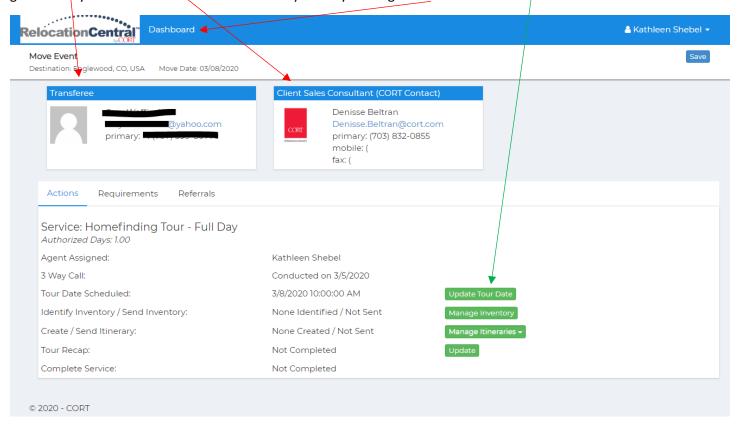
Step 3) Accessing your customer/transferee

Next you will be presented with all transferees currently assigned to you. Click anywhere under "**Current Move Events**" to access the file:



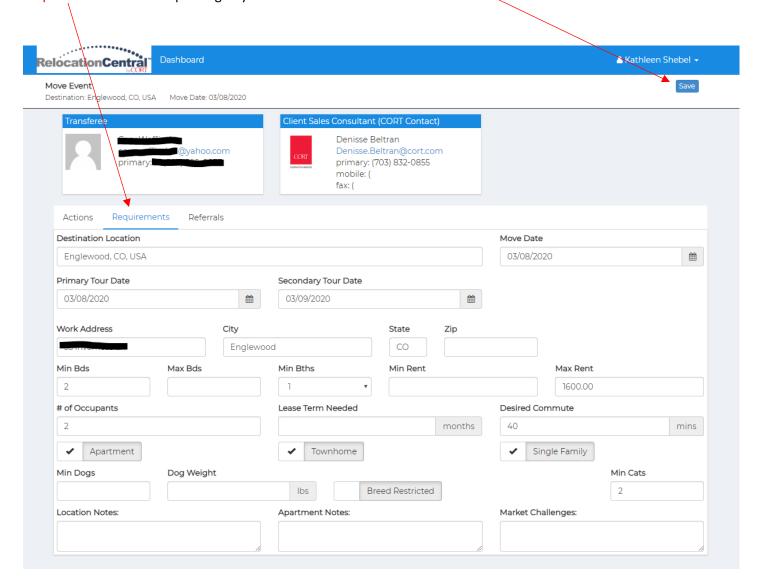
Step 4) Working on a transferee's file

This is what you will see after clicking on a transferee's name. This is where you will do all your file updates. The Transferee and CORT CSC contact info is listed here (Name, Email, Phone), and the green tabs allow you to update a tour date, manage/search inventory, send an itinerary, mark the tour as completed, and send a tour recap post tour. You can get back to your dashboard of transferees at any time by clicking on Dashboard.



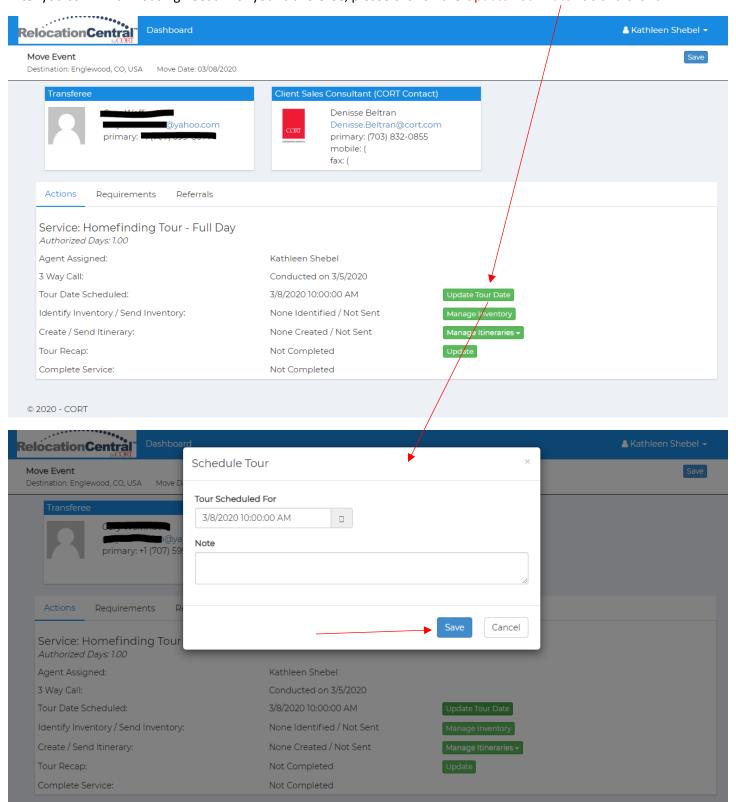
Step 5) Call transferee and confirm housing needs

If your CORT CSC has asked that you skip the 3-way call and they have requested that you reach out to the transferee directly go ahead and speak to your transferee and confirm all Housing Needs. You can adjust the Housing Needs in the Requirements tab when speaking to your transferee as well. Be sure to click SAVE when done.



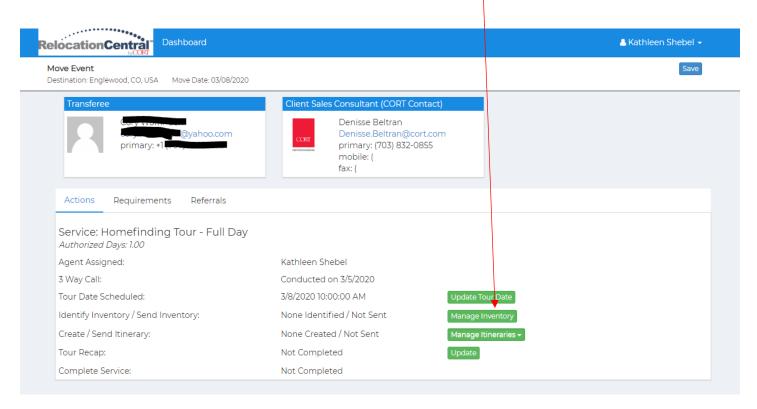
Step 6) Update Tour Date

After you confirm all housing needs with your transferee, please click on the Update Tour Date Tab and click SAVE.

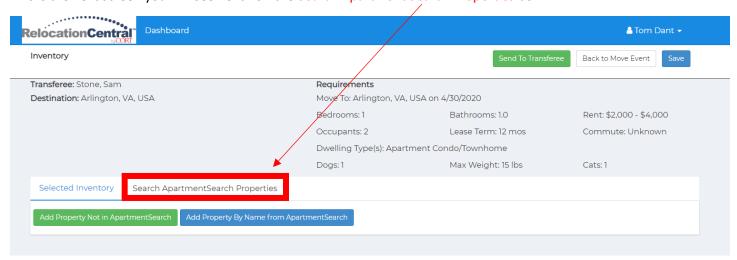


Step 7) Select inventory to send to your transferee

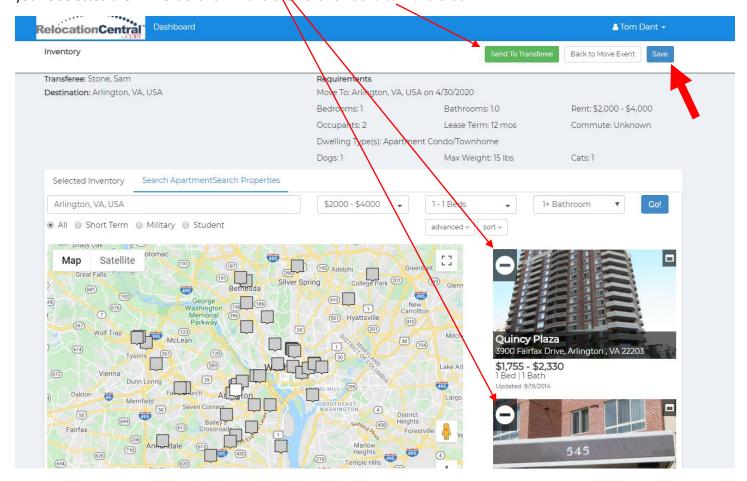
Next you will want select inventory for your EE by clicking on the Manage Inventory tab:



This is the next screen you will see. Click on the Search Apartment Search Properties box:

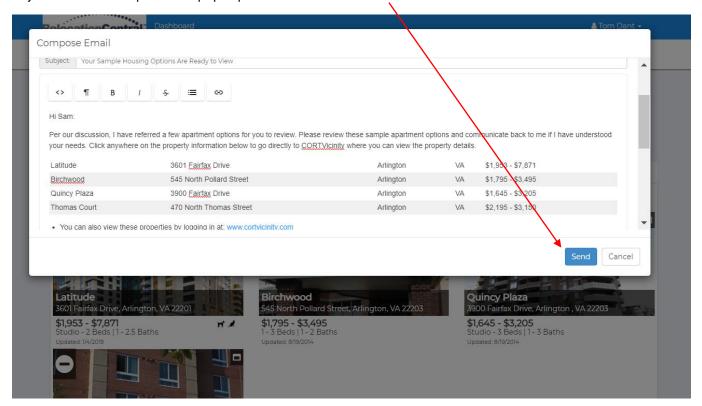


Now you will select the appropriate properties by clicking on the + sign which in turn, marks them as a – sign once you've selected them. Next click SAVE and then click on Send to Transferee:

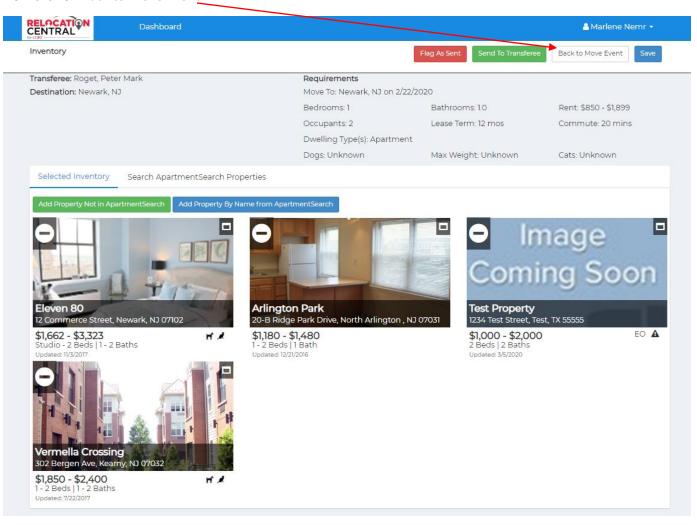


PLEASE NOTE THAT IF YOU ARE ATTEMTING TO EXPAND A PROPERTY VIEW TO SEE ALL PICTURE AND DETAILS BY CLICKING ON THE LITTLE BOX IN THE TOP RIGHT SIDE OF A THUMBNAIL, YOU WILL BE PROMTED TO SIGN IN TO ANOTHER SCREEN BUT DON'T WORRY, THIS IS NORMAL AND YOU ONLY HAVE TO DO IT ONE TIME FOR YOUR CURRENT CUSTOMER'S PROPERTY SEARCH. SIMPLY ENTER IN YOUR EMAIL FOR THE USERNAME AND cort FOR THE PASSWORD.

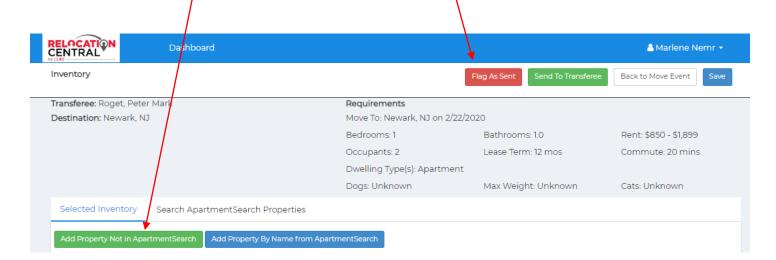
Adjust the email template that pops up as needed then click send:



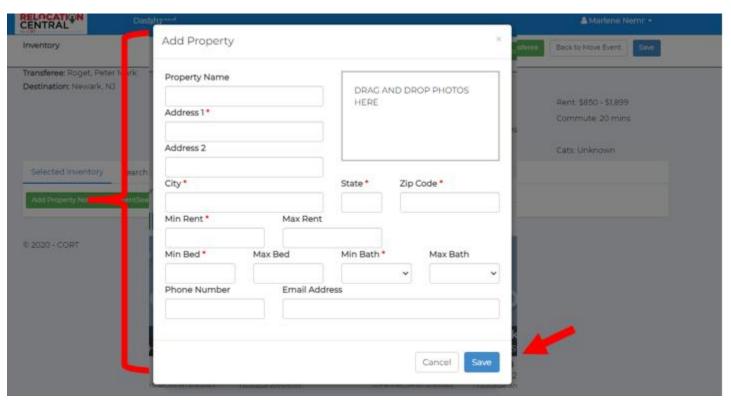
Now click on Back to Move Event:



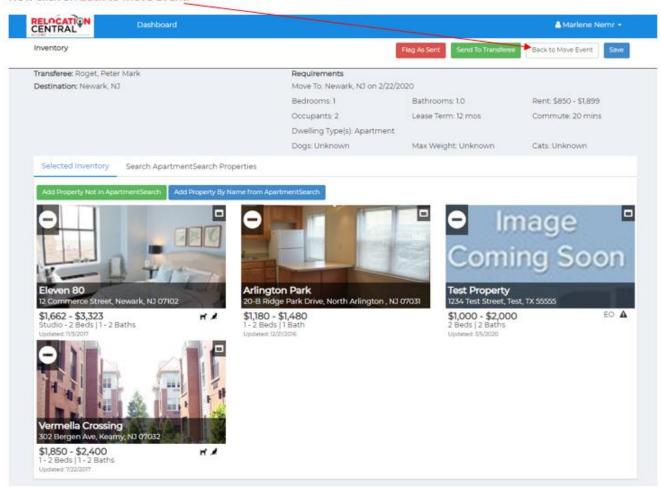
If you don't find what you are looking for on ApartmentSearch.com (especially for SFH/Private Listings), there is an option to Add a Property Not in ApartmentSearch or you can Flag as Sent if you are sending via email directly to your transferee (Please cc your CORT CSC when sending to your EE).



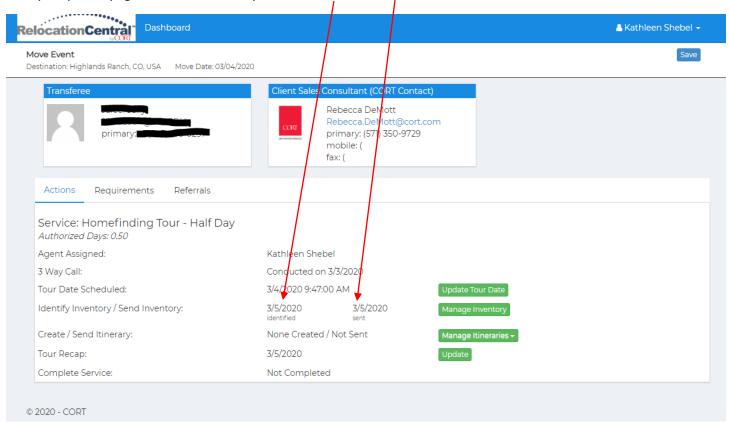
Once you click on Add a Property Not in ApartmentSearch you will see this pop up. Please fill out as much as you can on this screen and then click SAVE.



Now click on Back to Move Event:

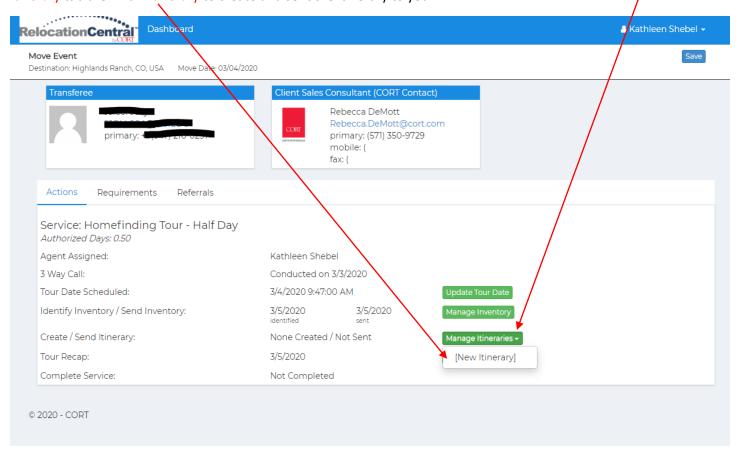


Now your profile page will show inventory has been identified & sent:

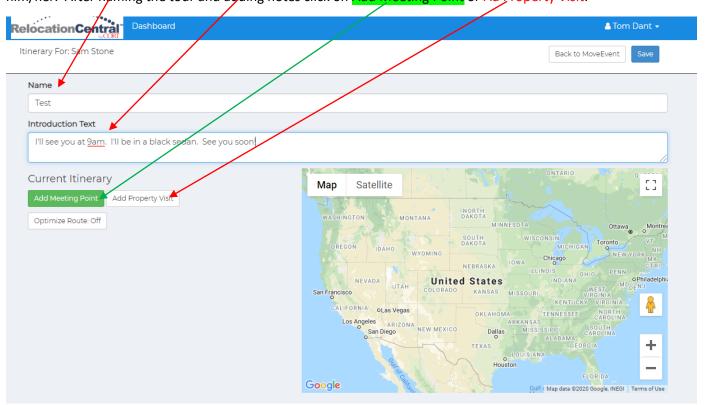


Step 8) Sending Itinerary

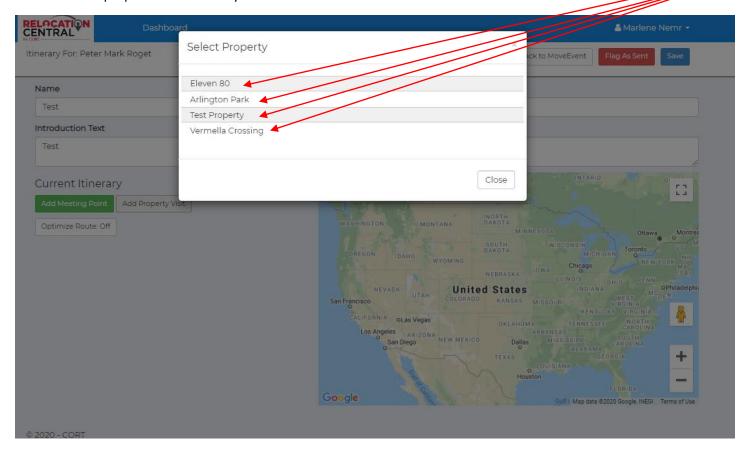
After the transferee has viewed and agreed to the properties you've referred, you'll want to click on the Manage Itinerary tab then New Itinerary to create and sent the itinerary to your EE:



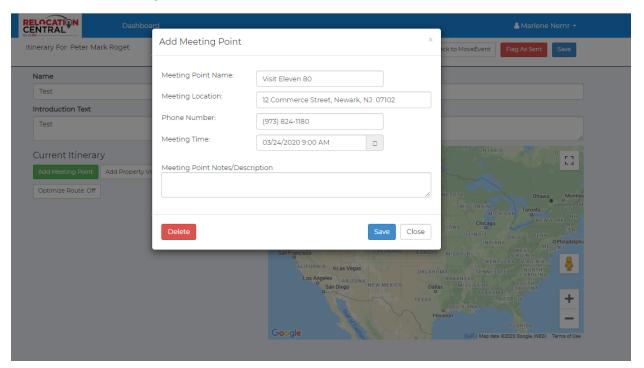
Here you can name the tour and add any notes you'd like the EE to see at the top of the itinerary you'll be sending him/her. After naming the tour and adding notes click on Add Meeting Point or Ad Property Visit.



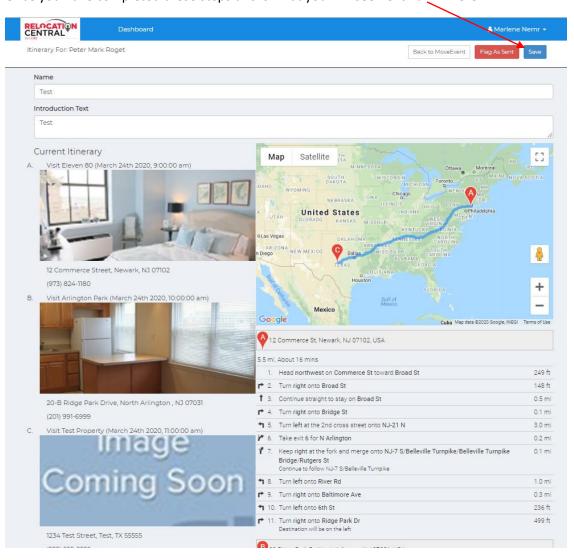
Adding a meeting point can include anything such as a hotel or work location. Next Click on Add Property Visit and click on each of the properties for tour day:



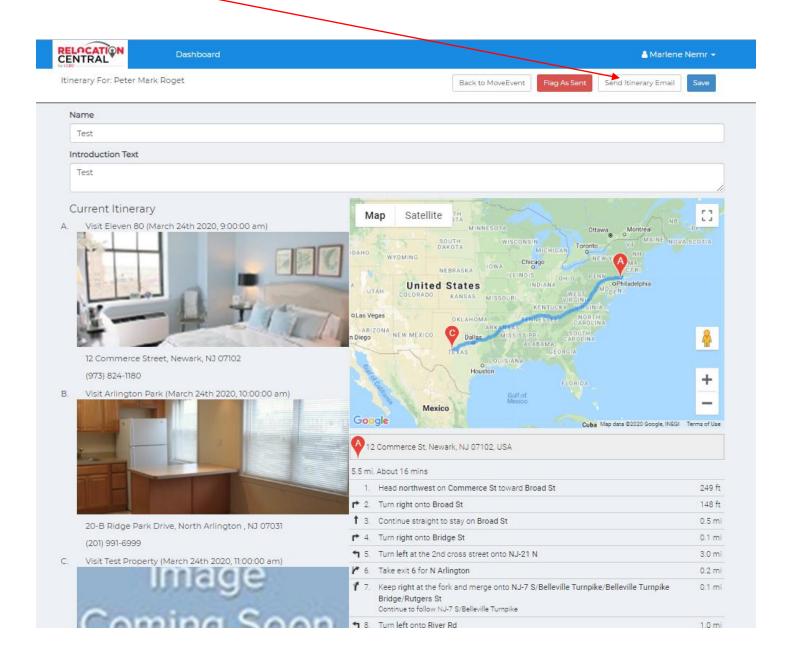
Be sure to add a meeting date and time and click save for each:



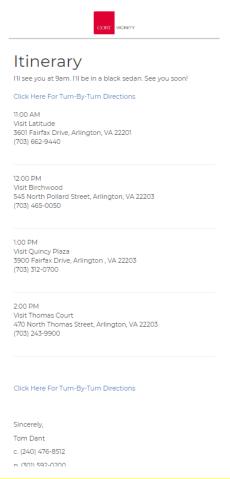
Once you have completed these steps this is what you will see. Click SAVE here:



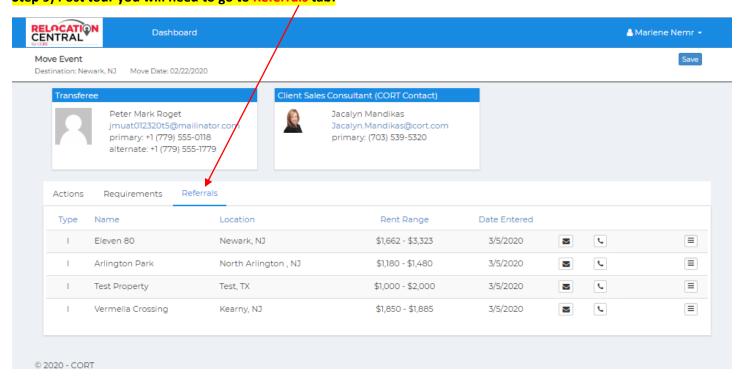
Now click on Send Itinerary Email:



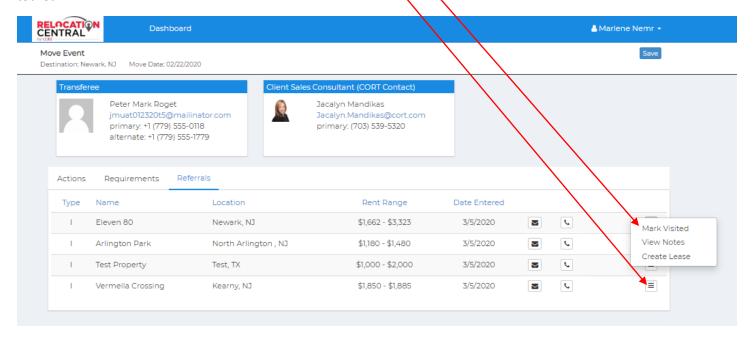
At this point the transferee will have your tour itinerary. Here's what they will see (a copy will be in Tracking Notes):



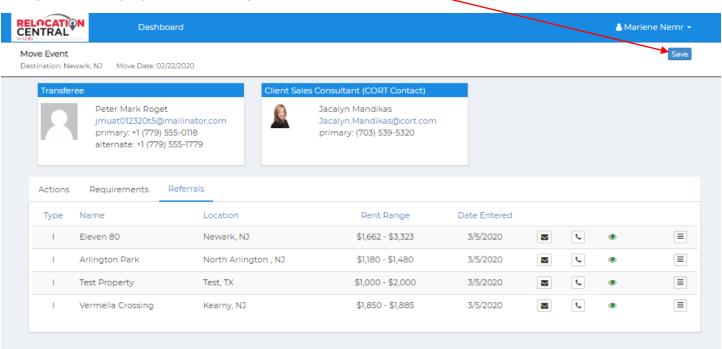
Step 9) Post tour you will need to go to Referrals tab:



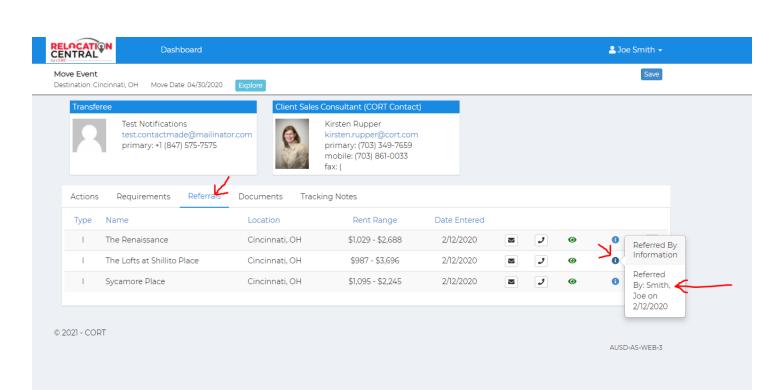
Click on the little box with the 3 horizontal bars to access Mark as Visited and click on it. Do this for all properties toured:

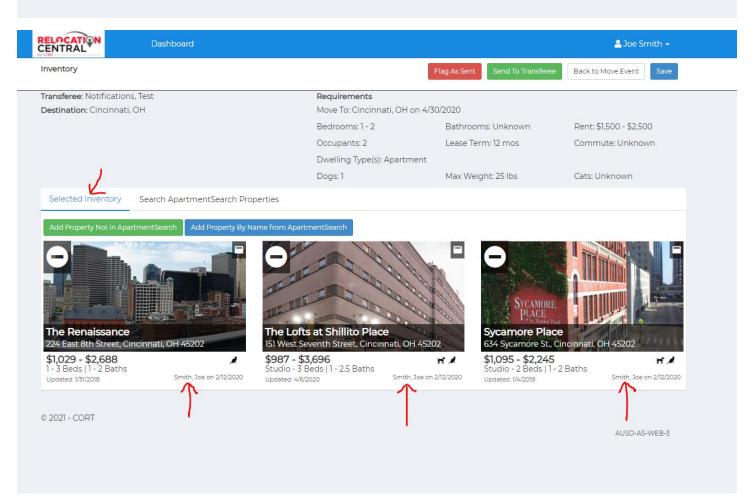


After you mark the properties as visited you will see this screen. Click SAVE



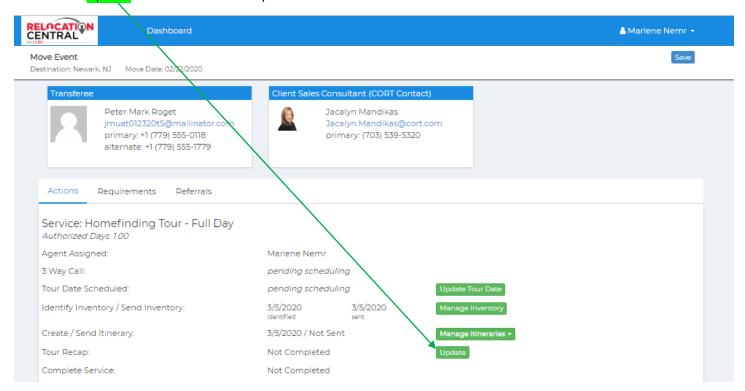
You can also now see who referred properties in this section...either you are your CORT CSC's name will appear here in these sections:



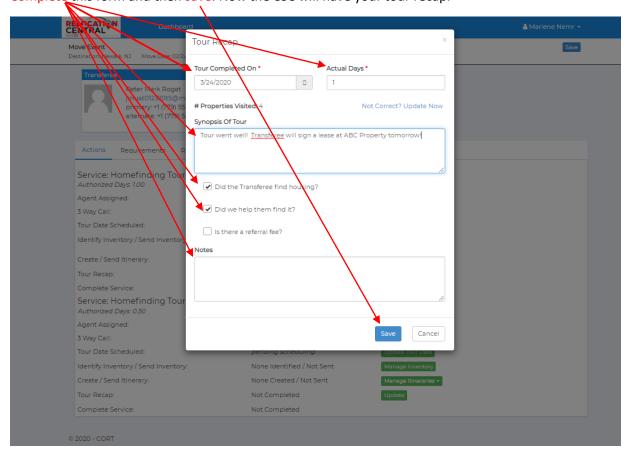


Step 10) Complete Tour Recap

Click on the **Update** tab next to Tour Recap:

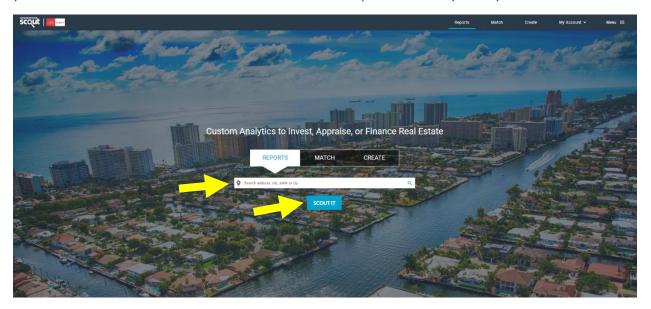


Complete this form and then save. Now the CSC will have your tour recap.

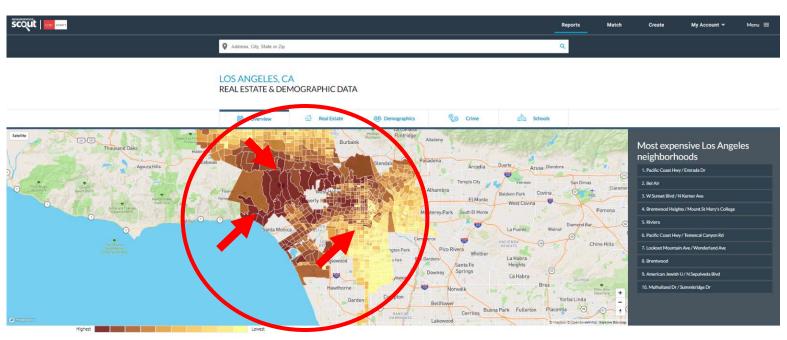


NAVIGATING NEIGHBORHOOD SCOUT

Once you click on "Explore Neighborhoods" from your dashboard or "Explore" from a customer's page, you will see the Neighborhood Scout Landing page. To start your search, simply type in a city, state, zip code or specific address such as your work address in the search bar and click "Scout It" or press enter on your keyboard:



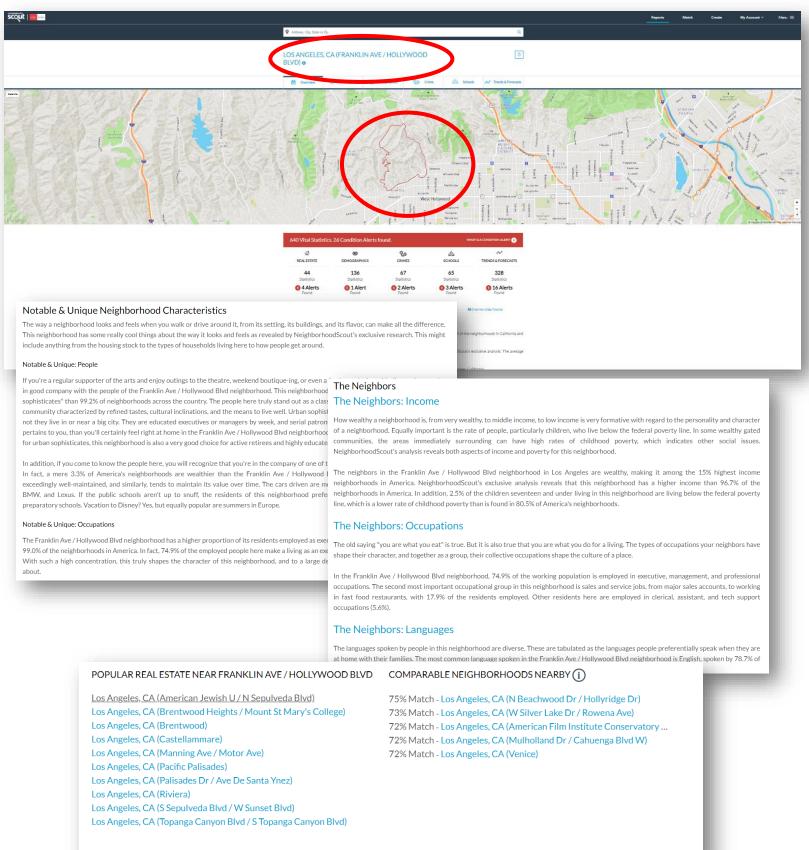
The next screen will show you an overview of the city, state, zip code or specific address. The default map view is interactive and shows the most expensive to least expensive neighborhoods in that area (dark orange is most expensive and light orange is least expensive). Click on any of the highlighted areas to get a micro-level/granular perspective of an area:



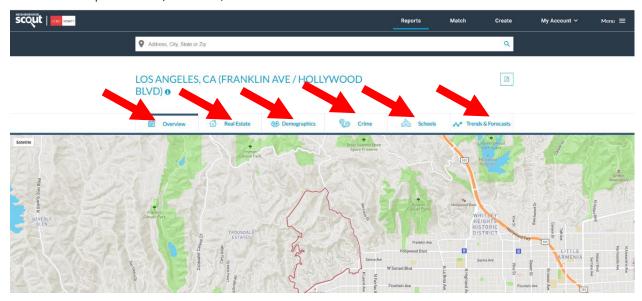
POPULATION: 3,999,759

LOS ANGELES PROFILE

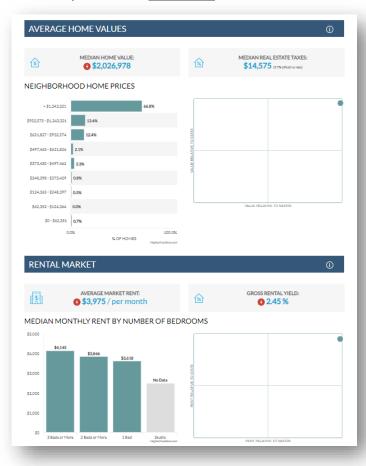
After you click a colored area on the interactive map you will be presented with a micro-level/granular view of a location. The data provided will be for this specific area and will often times provide comparison data to the rest of the city/metro area, state and country. You will also notice that this page shows some great data on the overview of the selected area such as real estate prices, income levels, occupations, demographics, notable unique characteristics and commute times:

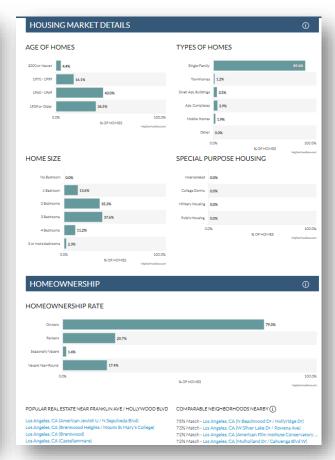


For more specific data/statistics, click on the section tabs:

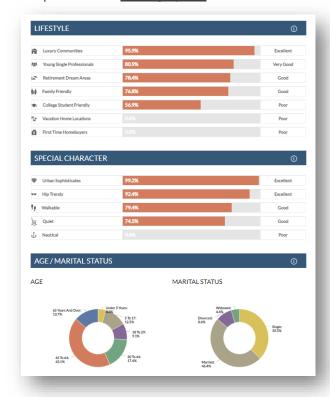


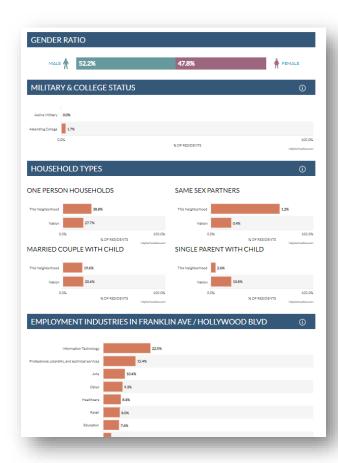
Sample from the Real Estate Tab:





Sample from the **Demographics** Tab:



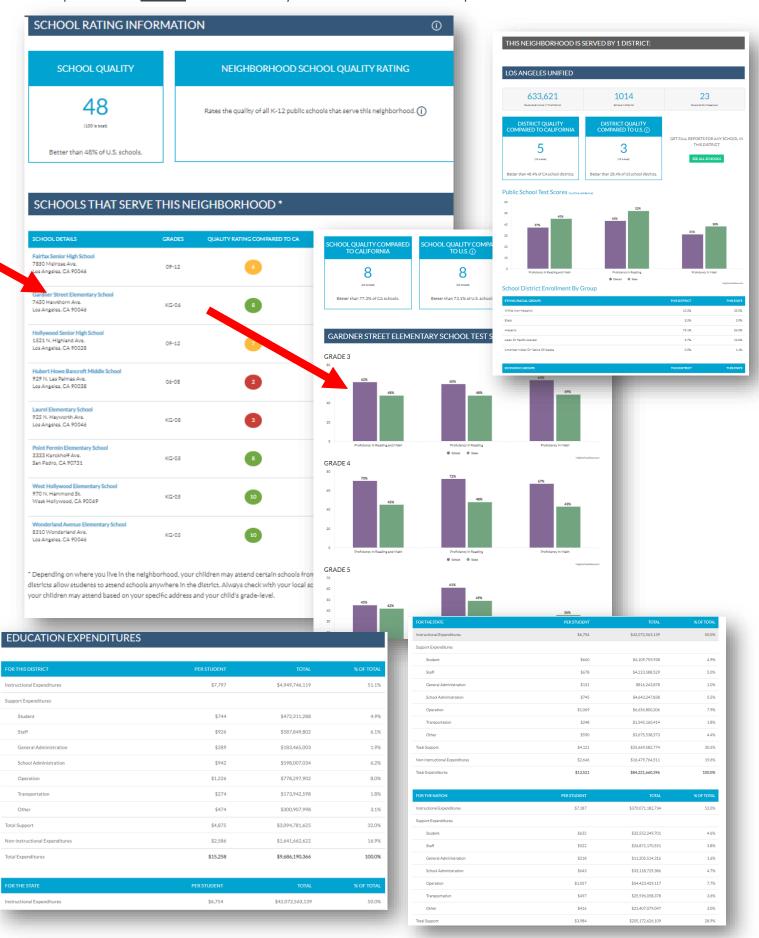


Sample from the Crime Rates Tab:

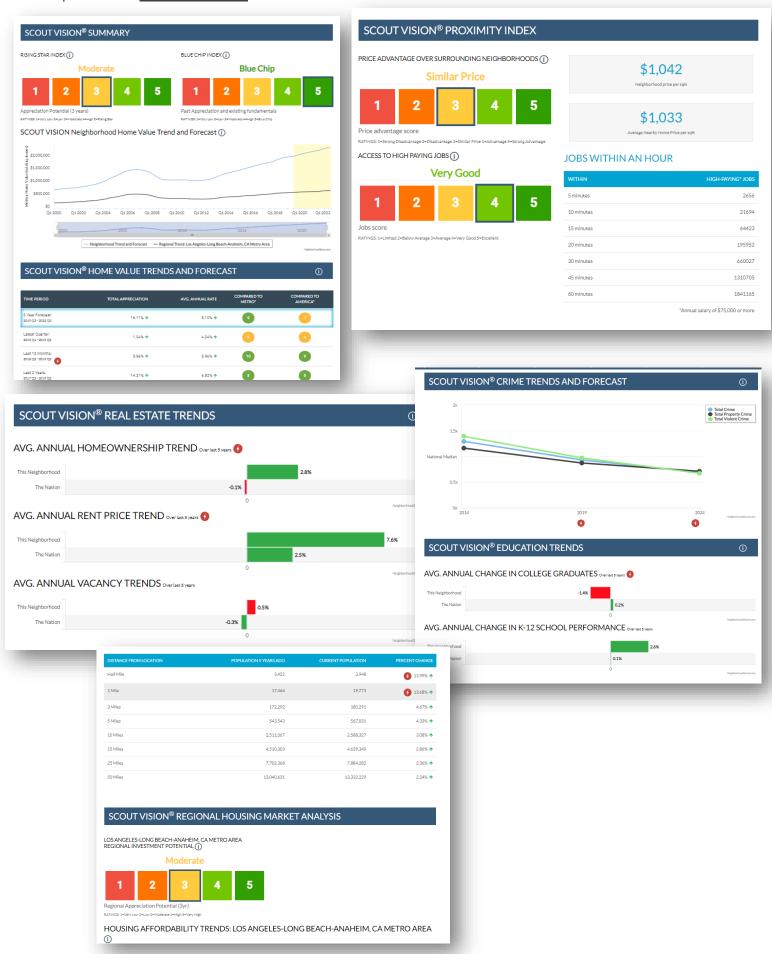




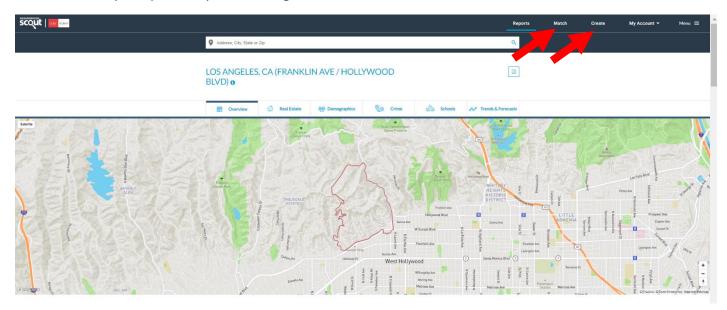
Sample from the Schools Tab. Click on any of the school names to see specific school data:



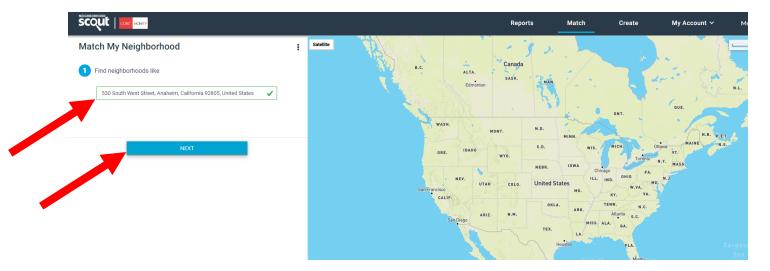
Sample from the <u>Trends & Forecast</u> Tab:



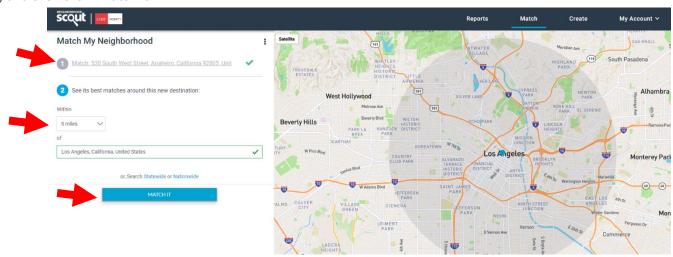
Use the <u>Match</u> or <u>Create</u> Tabs to match your destination location to your origination location or select specific traits and characteristics that you'd prefer in your new neighborhood:



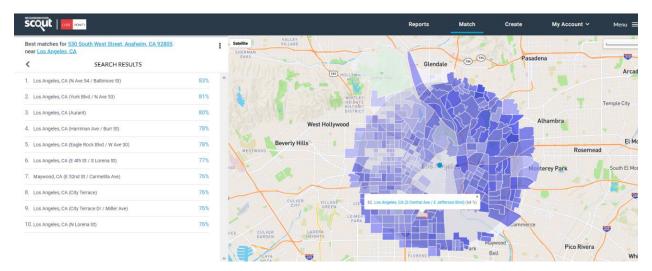
For the <u>Match</u> function, click on <u>Match</u> and then enter a city or address to find neighborhoods like them in your new area then click Next:



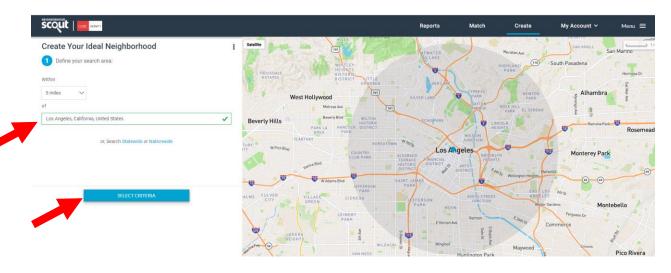
Next select the radius drop down and enter in a specific address or city to match (typically will be in/near your destination location) and then click "Match It."

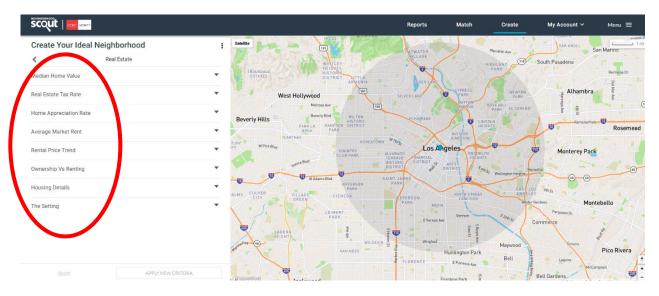


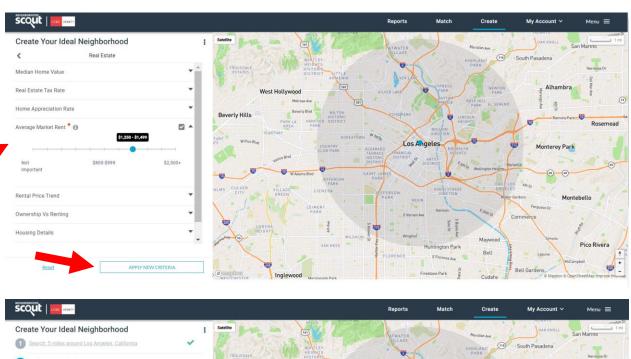
Now you will be presented with a list of "matches" based on the origination and destination information you've entered. At this point follow all the above steps to view this info on a micro/granular level. You'll be able to scroll through all the tabs we previously mentioned as well.

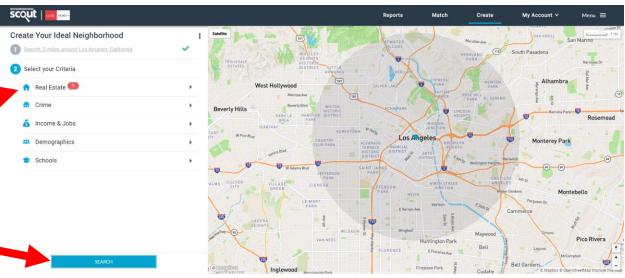


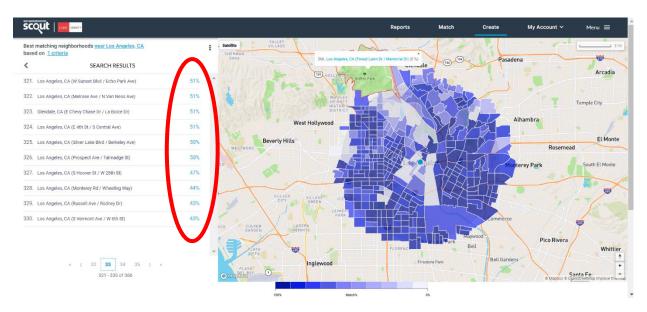
The <u>Create</u> Tab offers you the ability to search for areas using filters. See below. Once completed, follow the same steps as above to view area details:











Please copy your CSC on all emails to your transferee. Post tour, please notify your CORT CSC on which properties you visited on tour day as well as where your transferee rented either by completing the Tour Recap tab or via email.