

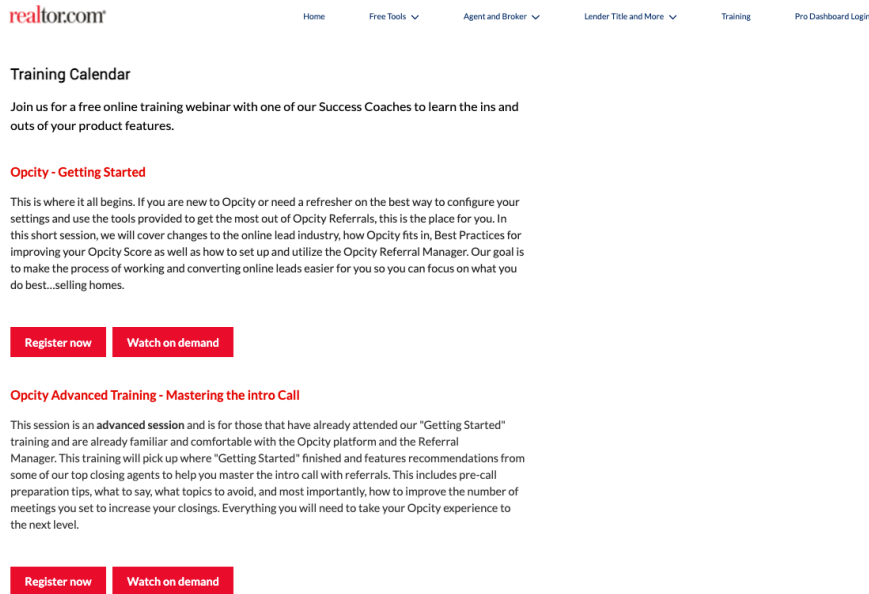
ReadyConnect Training, Tips, & Requirements

(previously Opcity through Realtor.com)

ReadyConnect Concierge (Opcity) is a service provided by Realtor.com and Realty ONE Group Music City to allow you to join a lead generating system where you will be provided the opportunity to claim buyer & seller leads based on performance, preference settings, and a matching algorithm (more on this below).

This is a voluntary referral program that collects a 35% referral fee per closing (\$150k+) or 30% (<\$150k), based on the purchase price – with Smart Home Rewards as an additional 3% owed when applicable. Lease commissions are a 35% referral fee.

First, if you'd like to participate in this program, you'll need to complete the training at <https://support.realtor.com/s/opcity-training> - both the 'Getting Started' & 'Advanced Training'.



Training Calendar

Join us for a free online training webinar with one of our Success Coaches to learn the ins and outs of your product features.

Opcity - Getting Started

This is where it all begins. If you are new to Opcity or need a refresher on the best way to configure your settings and use the tools provided to get the most out of Opcity Referrals, this is the place for you. In this short session, we will cover changes to the online lead industry, how Opcity fits in, Best Practices for improving your Opcity Score as well as how to set up and utilize the Opcity Referral Manager. Our goal is to make the process of working and converting online leads easier for you so you can focus on what you do best...selling homes.

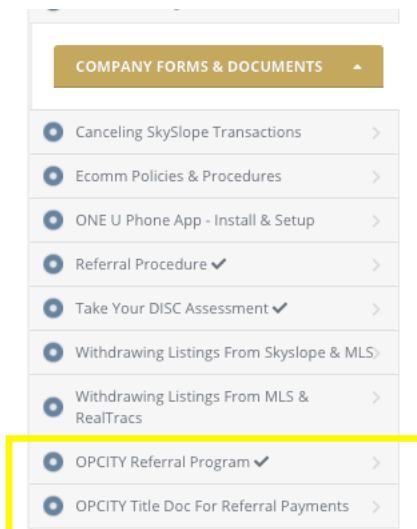
[Register now](#) [Watch on demand](#)

Opcity Advanced Training - Mastering the Intro Call

This session is an **advanced session** and is for those that have already attended our "Getting Started" training and are already familiar and comfortable with the Opcity platform and the Referral Manager. This training will pick up where "Getting Started" finished and features recommendations from some of our top closing agents to help you master the intro call with referrals. This includes pre-call preparation tips, what to say, what topics to avoid, and most importantly, how to improve the number of meetings you set to increase your closings. Everything you will need to take your Opcity experience to the next level.

[Register now](#) [Watch on demand](#)

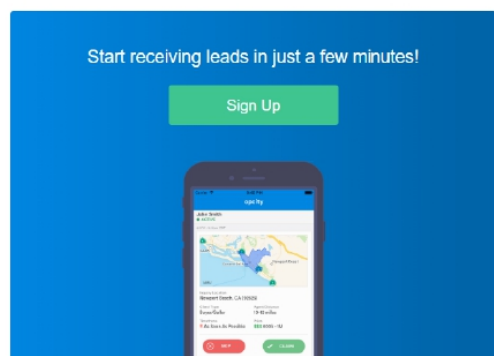
In addition, you'll need to access ROGMC.com and review both Opcity documents available under 'Company Forms and Documents'. Once this has all been completed, email Chrissy@RealtyONEMusicCity.com, let her know, and request an invitation to join.



Once added to our company roster, you will receive an invitation from the Opcity system and need to set up your profile:

Hi Mary,

Monte Mohr has enrolled Realty ONE Group Music City with Opcity, a proven referral program where you can get pre-screened real estate leads delivered straight to your mobile phone at no upfront cost. Opcity leads close at a rate 3-5x higher than the industry average.



First Name

Mary

Last Name

Perreault

Email

Maryp@realtyonemusiccity.com

Retype Email

Maryp@realtyonemusiccity.com

Make sure you can check this email. You will need to verify this email address.

License #

284060

☒ I certify that I'm a licensed Real Estate Agent in good standing sponsored by: Realty ONE Group Music City

SIGN UP

How long have you been an agent?

Less than 6 months

6 mos - 1 year

1 - 2 years

Over 2 years

How much transaction volume have you closed in the last 12 months?

Less than \$1M

\$1M - \$1.4M

\$1.5M - \$1.9M

\$2M or more

How many transactions have you closed in the last 12 months?

0 - 1

2 - 4

5 - 6

7 or more

How many times do you attempt to make contact with a client before giving up?

Just once

2-3 times

4 or more times

SUBMIT

1

Verify your mobile number

2

Set your lead preferences

3

Agree to the Opcity Terms

You're eligible to join the Opcity Referral Program!

There are just a few more steps you need to take before we activate your Opcity account.



Mary Perreault
Realty ONE Group Music City

START

1

Verify your mobile number

2

Set your lead preferences

3

Agree to the Opcity Terms

Verify your mobile number

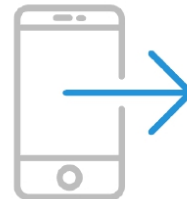
We need to verify your mobile device to complete your sign up.

Please enter the phone number of the mobile device you will be using to receive Opcity live transfer notifications.

Mobile Phone #

615-476-0832

SEND VERIFICATION CODE



© Opcity, Inc. 2019

1

Verify your mobile number

2

Set your lead preferences

Enter mobile verification code

We just sent you a text message with a code. Enter it below to verify your phone number.

Didn't receive a text message? [Try again.](#)

Enter Your Verification Code

|

VERIFY

If you are a Sprint customer and did not receive a code, please send the following text message to 9999

Allow 51679

After you complete this step, [try again](#)

If you are a T-Mobile customer and did not receive a code, you may need to contact your carrier in order to receive messages from our shortcode: 51679

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What areas do you service?

Enter the postal code that best matches the center of your service area.

Your Home Base Zipcode



● Brokerage Coverage Area

● Your Coverage Area

How many miles are you willing to travel to meet a client? We recommend 25 miles for most agents.

What types of clients do you serve?

Are you interested in working with investors?

Yes	No
-----	----

Are you also interested in working with clients looking to lease?

Yes	No
-----	----

Are you fluent in Spanish and able to assist Spanish-speaking clients?

Yes	No
-----	----

We occasionally have clients who request to work with an agent of a specific gender. What is your gender?

Male	Female	Prefer not to say
------	--------	-------------------

Opcity Requirements Quiz

- ☒ I agree that if I accept a referral via text message or app notification, I will be available to accept an introductory call from Opcity:

In an hour

Later today

Now

- ☒ I agree to keep Opcity updated on the status of all referred clients by:

Email updates to Opcity

Updating the Opcity Referral Manager

Calling Opcity

- ☒ I agree to update the status of each referred client at least:

Once a week

Once a month

Anytime the status changes

By participating in the Opcity referral program, I agree to this Agent Referral Agreement and Opcity's Terms and Conditions found here <https://signup.opcity.com/agent/terms> which may be updated from time to time. I understand that I am obligated to pay any referral amounts owed to Opcity for any transactions executed with a Referral for twenty-four (24) months (the "Referral Coverage Period") notwithstanding a termination in my relationship with my current Broker. I understand that Opcity retains the right to pursue me individually for Referral amounts owed and to notify any new broker that I enter into a contractual relationship with of my obligations (including providing a copy of this Agent Referral Agreement). I also understand that my current Broker can pursue me for any payments made to Opcity as a result of a transaction I closed with a Referral.

Mary Perreault

Agent Name

Mary Perreault

Agent Signature

07/17/2019

Date

I agree to be legally bound by this document and the [Opcity's Terms and Conditions](#). Click on 'I Agree' to continue.

I AGREE

OPCITY



You're all set!

Check your inbox for an email from Opcity.

We're thrilled you joined us.

Once you have created your profile and you're ready to start receiving leads, there are some important items to keep in mind to ensure you are able to receive the most leads and see best results from utilizing this service:

- You are added as an 'Emerging' agent, and as you continue using the system and have successful closes, you'll become an 'Experienced' agent which will yield better leads.



The Matching Algorithm

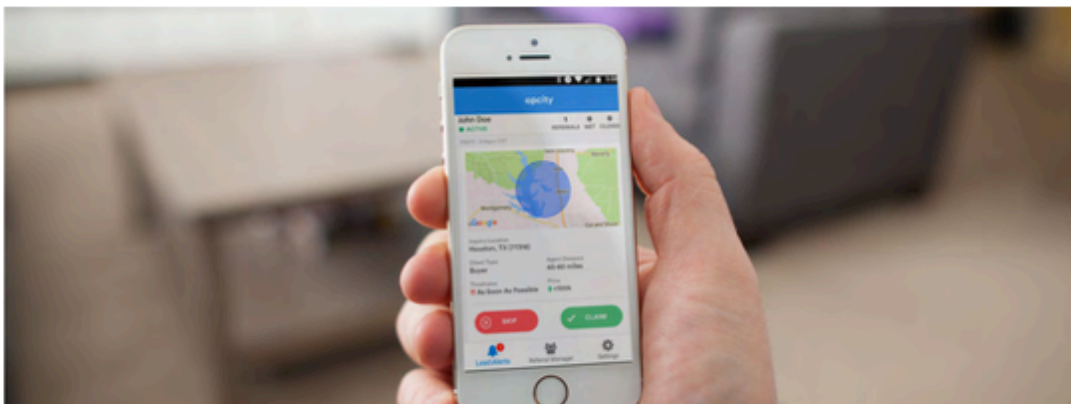
How does it work?

The Opcity matching algorithm is what differentiates Opcity and allows our leads to convert at 9-15x the industry average. We ensure that the right lead is matched with the right agent at the right time. We take everything we know about a client, and everything we know about our partner agents, and within second generate a ranked list of agents who are most likely to close that client

Key factors in our matching algorithm include:

- **Location:** The lead's proximity to the agent's preferred coverage area
- **Price Point:** Whether or not the lead's price point falls within the agent's selected price range
- **In-Town/Out-of-Town:** The agent's history of working with buyers looking to relocate/ long-distance sales
- **Referral Manager History:** The agent's history of keeping Referral Manager updated and moving leads through the pipeline

When we have a motivated home buyer or seller on the line, we review the information the client provided, and rank the possible agents available in the market in the order of who will be the best fit for that particular client. Sometimes this list can be a handful of agents long, and sometimes much longer depending on the market. Opcity agents are ranked on their ability to serve the client's, as well as their ability to close the deal. We then begin our dispatch process.



The Dispatch Process

How does it work?

Agents who are ranked in our list will be sent a lead alert via text or mobile push notification. Lead alerts include basic information on the client, such as location, price range and timeframe to buy. Agents can use this information to quickly determine if a lead is one they want to accept or decline.

This agent has approximately 10 seconds to click-to-claim the lead alert before the second agent receives a lead alert and is able to click-to-claim the lead. Lead Alerts will continue to be distributed one by one to all ranked agents until any agent clicks "Claim."

Higher-performing agents receive access to leads at higher price points and are provided with more time to accept leads.

Opcity tracks agent engagement with lead alerts. Agents should always click "Skip" or "Claim" any lead received. Ignoring lead alerts will negatively impact agent ranking with Opcity.

The first agent to "Claim" a lead alert will receive a phone call within minutes from our call center. On this call, we'll privately brief the agent on the details of the client, and will then connect the client and the agent over a live three-way phone call and make the introduction.

From here, we'll assist in arranging for a time for the agent and client to meet. Our data shows that agents who meet a client quickly after speaking are significantly more likely to close with that client. After this, we'll leave you to continue the call on your own.

A new lead alert might be clicked on within a few seconds, but a notice will say that the lead was already claimed. This is because the first agent in the queue is the only agent that has a lead exclusively to themselves. Even if you don't "win" a lead, clicking-to-claim a lead alert still helps to improve your rankings because the algorithm recognizes that you're interacting with the system.



How to Improve Agent Ranking

in the Dispatch Process:



Following these steps will result an increase in the quality and quantity of referrals received.

Remember, our success is dependent upon your success! Let's work together to ensure we are getting these referrals to the closing table. Visit support.opcity.com to explore FAQs or submit a help ticket.



Now that you know how to get set up & what factors affect your lead flow, let's review the Referral Manager. When you log in to Opcity you'll see a list of your Referrals. There are tabs at the top and your view will default to your Active referrals.

You should always see the status below your name as 'Up to Date' – if not please make updates as needed on referrals ASAP!

Referrals

96 REFERRALS 35 MET 12 CLOSES

UP TO DATE ACTIVE HOLDING RELEASED CLOSED STATS

Q Name, Status, Email, Phone

ACTIVE

Sara R
MET / HOUSE HUNTED
Buying
This referral was recently updated
Last Updated: 17 hours ago

Si
SPOKE
Buying
Last Updated: 3 days ago

L
SPOKE
Buying
Last Updated: 3 days ago

Ga
MET / HOUSE HUNTED
Buying

When you click into a Referral you will see their current status, and their Transaction details.

When you review the Transaction Details it will give you details of their purchase/listing and will also identify if they are participating in the **Smart Home Rewards** referral program which is an additional 3% commission referral fee.

Referrals

Meet virtually over video chat
During this time, meeting your client over video chat counts as a 'Met' status update. [Learn more](#)

Sara
(203)
sara@gmail.com
Buyer
Smart Home Rewards

CALL SMS EMAIL

CURRENT STATUS WE MET / HOUSE HUNTED

Is this referral also selling a property?
[+ Add Transaction](#)

Transaction Details

FINANCING Financing	BUDGET \$895,000	TYPE Buying
TIMEFRAME <90 days		
MOTIVATION First-time Home Buyer	PROPERTY TYPE Any Residential	
LOCATION In Town		

NOTE
Sara is looking to buy in the next 90 days. Their budget is \$895,000 and they're not pre-qualified. They have requested a tour of the property 07/11/2021 01:00 PM CDT. Sara is participating in the Smart Home Rewards referral program. All Client Rewards will be managed by realtor.com and as such are subject to an additional 3% commission fee. For additional details on the program visit <https://hub.realtor.com/product-insights/smart-home-rewards>.

INQUIRY DETAILS

Property tour requested
1013 Montrose Ave
Nashville TN 37204
[View listing](#)

MLS 2269572

At the bottom you have the option to Update Status, Hold, or Release this lead.

Update status
Last Updated: 6 days ago

Hold Release

Each lead requires a status update every 7 days at a minimum. It will highlight any leads that will need an update soon to ensure you don't get behind.

⚠ This referral will need an update soon
Last Updated: 6 days ago

If a lead needs an extended amount of time before moving forward, you can **place them on Hold** selecting 1, 2, or 3 months along with a note. Opcity encourages you to pursue a lead weekly for at least one month before placing them on a Hold.

If you are not able to continue working with a referral, we encourage you to **release the lead** so they can be reassigned. Ignoring a lead or leaving it in your referral manager without updates will negatively affect your algorithm. If client is non-responsive but later becomes active, we have been advised that they will be re-assigned back to you.

Release to Opcity

If you are not able to continue working with a referral, we encourage you to release that lead to Opcity so that we may assign it to another agent.

Reason for releasing *

Select...

Client not looking right now

Client will not respond

Client is not a good fit for me

Client not pre-qualified/needs help with financing

Client already has an Agent

Client needs an agent outside of my area

When you are unavailable to receive leads, you need to go into your Settings (the gear at the top right of your Referral Manager) and **'Snooze' your leads** or set a specific **'Do Not Disturb'** window. This will pause your lead flow so that your algorithm is not negatively affected when you're unavailable. You can also edit your preferences in this section.

The screenshot displays the Opcity Referral Manager interface. On the left, a 'STATS' section shows 37 REFERRALS, 20 MET, and 0 CLOSES. A yellow arrow points from the 'STATS' section to a gear icon (Settings) in the top right corner. The main content area is divided into two columns. The left column contains settings for LOCATION (Within 48 miles of: 37211), DISABLED ZIP CODES (Accept All), CLIENT TYPES (Disabled: Lease / Rent-to-Own), PRICE RANGES (Disabled: <60k, 60k - 100k, 100k - 150k), and PROPERTY TYPES (Disabled: Land, Mobile / Manufactured). Below these are 'Notifications' settings: 'SNOOZE LEAD ALERTS' (checked, Notifications Enabled) and 'DO NOT DISTURB' (checked, Receive lead alerts any time). The right column is titled 'Opcity Support' and includes links to 'AGENT HELP CENTER', 'TERMS & CONDITIONS', 'DOWNLOAD AGENT REFERRAL AGREEMENT', and 'DOWNLOAD OPCITY FORM W-9'. The 'DOWNLOAD AGENT REFERRAL AGREEMENT' and 'DOWNLOAD OPCITY FORM W-9' links are highlighted with a yellow box.

In preparation for closings, this Settings section is also where you can access the **Agent Referral Agreement** and **Opcity W9**.

During the course of your transaction, Opcity will send multiple email status updates – when you’ve met with your lead, when you go under contract, 5 days prior to close date reminder, and closing confirmation. **Pay attention to these!**

When a lead has closed, Opcity will send you an email that details their specific requirements for closing that looks like the below. In this email they will also provide the Opcity W9. The lead will also be assigned a Transaction ID which you can find in your Referral Manager.

Please note the requirements below when emailing your documents!

Closing documents must be emailed from your email, or have you CC’d, to docs@opcity.com referencing the Home Address & Transaction ID which will be found in your Referral manager.

Note that these items must be received within 14 days of closed transaction

Congratulations, Quentin!

We see that you closed a transaction with Joe anderson. Nice work! We're lucky to have you as an Opcity partner.

Transaction Details:


- MLS Number: 2138163
- Address: 3030 Oglethorpe Drive, Franklin, TN, USA
- Transaction Amount: \$491,000.00
- Agent Commission (as entered in Referral Manager): None

We must receive payment and closing documentation **within 14 days of your closed transaction**, or as soon as reasonably possible, to increase you chances of receiving more, higher-quality leads with Opcity.

Opcity requires documentation from a third party stating the amount of the closed transaction and the commission distributed - we refer to this as the closing documentation.

Please reply to this email to submit your closing statement. To expedite the closing process, please:

- **Submit documents as a PDF file**
- **Include the home address** in the subject line
- **Send from your email address.** If the closing documents are coming from a third party, such as your broker, title company or assistant, **you must be copied on the email.**

You can also submit closing documentation by emailing docs@opcity.com 

Thank you for choosing to partner with Opcity!

When you click into your lead's profile, you will see details of items required that have not yet been received (Closings Statements, Referral Fees) **the Transaction ID**, and specific instructions on what Opcity requires to finalize the closing and confirm receipt of payment. They even provide a convenient **'Share Payment Info'** button that lets you enter an email address so you can easily send your title company closing agent the details – more on this later.

The referral fee owed to Opcity varies depending on the type of transaction:

- 35% referral fee per closing (\$150k+)
- 30% referral fee per closing (<\$150k)
- Leads participating in Smart Home Rewards are an additional 3% referral fee
- Lease/rentals are a 35% referral fee
- If your client is paying the transaction fee, the OPcity referral will be xx% of your commission + xx% of the client paid transaction fee.

Your referral fee should be paid at closing through your Title company, NOT the office. To make this efficient, the below document is required to be provided to your Title company and must be uploaded to your Skyslope file for reference.

Ensure your title company references the Home Address, Transaction ID, and CC's you on the email to accountingsupport@opcify.com and docs@opcify.com for all communications.

Use the previously mentioned 'Share Payment Info' to ensure your closing agent receives all the details via email to make complete/timely payment.

The following items should be sent to your title company closing agent:

- **Completed 'Upcoming Referral Closing' document below including Transaction ID**
 - **Opcity W9** (retrieve from closing email or Referral Manager settings)
 - **Agent Agreement** (retrieve from Referral Manager settings)

Please note if title does not send a copy of your closing docs to Opcity, then you are responsible for ensuring this is completed

When completing this form, please note that the Transaction ID is NOT the MLS ID.

Transaction ID: _____



Upcoming Referral Closing

Agent _____ Client _____ Closing on _____.

Address _____ Sales Price \$ _____.

Agent Commission \$ _____ + Client paid transaction Fee \$ _____ = \$ _____ x's _____ % = _____.

*******The referral fee due to Opcity is \$ _____*******

**** TITLE: Please SEND THIS DOCUMENT to OPCITY with the referral check or include the client name & transaction ID with the wire****

- The AGENT WILL send a copy of the closing statement to docs@opcify.com when provided by title.
- AGENT: Remember to update your [Referral Manager](#) when the close is complete or if any transaction details have changed.

Listed below you will find payment instructions.

Please note, payment and a copy of closing documentation is due within 14 days of your closed transaction.

Mail checks to:

Opcity, Inc
Dept 2570
PO Box 122570
Dallas, TX 75312-2570

For Courier Deposits (FedEx, UPS, etc.):

Opcity, Inc
892570
1501 North Plano Rd, Ste 100
Richardson, TX 75081

Alternatively, you may send a bank transfer to:

Bank's Name:	SILICON VALLEY BANK
Bank's Address:	3003 Tasman Drive, Santa Clara, CA 95054, USA
Routing #:	121140399
Account #:	3302091337
Beneficiary Name:	OPCITY INC.
Beneficiary Address:	Dept 2570, PO BOX 122570, Dallas, TX 75312-2570, USA

In the very limited event that a title company will not pay a 3rd party referral, External Referral details should be provided in your Skyslope for the Operations Manager review and referral will be paid via check by the office. A screenshot of the payment details will be included in your Skyslope checklist for reference once completed.


In addition to the Opcity requirements, there are some additional Skyslope details the office requires as well for all Opcity closings:

- Transaction Tab - Source must show Other: Opcity

SOURCE *

Other	▼
OpCity	

- Referral Agreement, W9, and Opcity Title Doc should be uploaded to Checklist

15.	Referral Agreement, W9 and Opcity Title Doc	Completed	
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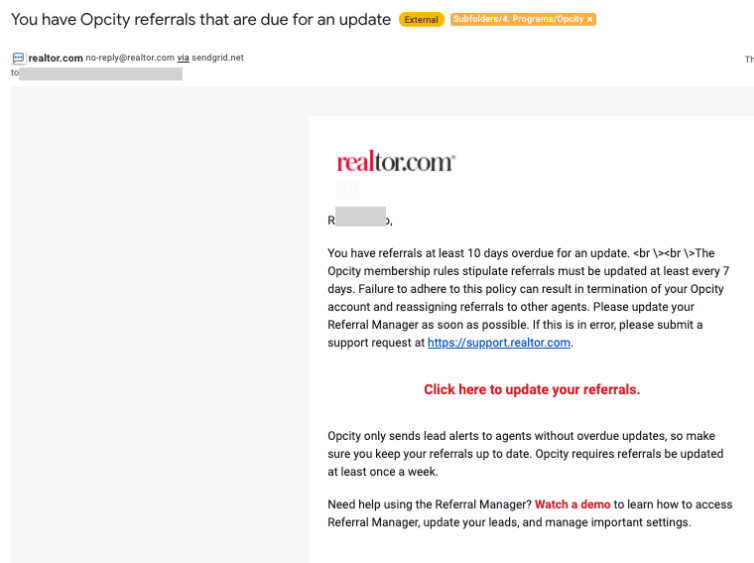
- Under the Commission tab, indicate the commission breakdown including Opcity Referral \$
- If the office is paying the referral fee at closing, the External Referral details should be updated in the Commission tab

Referral Details

REFERRAL TYPE	REFERRAL AGENT	REFERRAL BROKERAGE NAME
Select	<input type="text"/> Add	<input type="text"/>
REFERRAL AMOUNT	W9 FORM (PDF ONLY)	
<input type="text"/> \$ <input type="text"/> %	<input type="button" value="Choose File"/> <input type="button" value="Upload"/>	

Note the following important reminders!

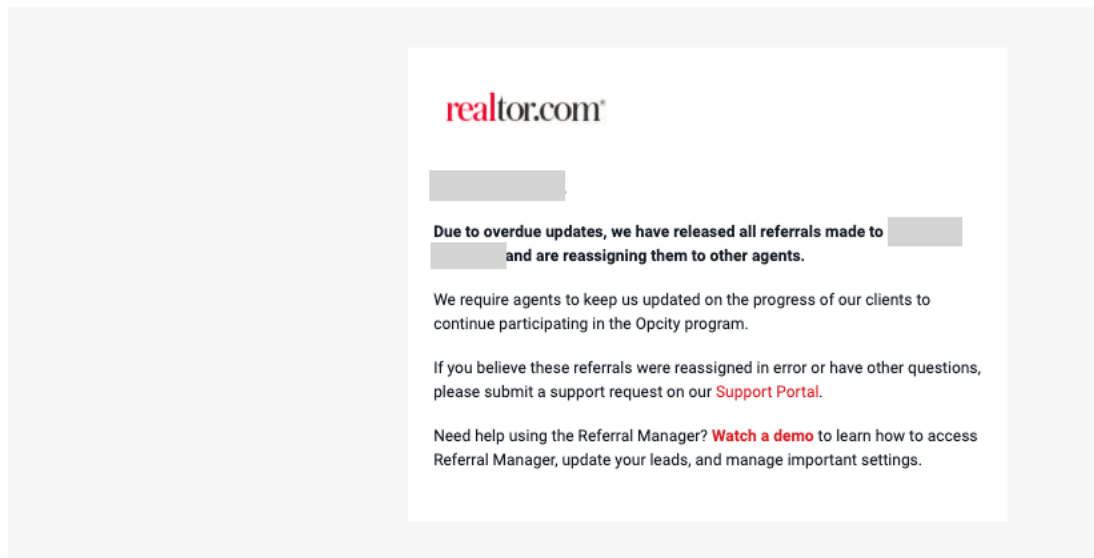
- The brokerage is notified of all Unpaid Closes within the Opcity system – either missing documentation, missing payment, incomplete payment, or needing additional closing data. This is audited on a monthly basis, and you will be notified of missing items. It is your responsibility to follow up with your closing agent and applicable Opcity departments to ensure they receive and assign necessary items to finalize your referral closing. The brokerage will NOT do this on your behalf. Unpaid closes that we do not receive communication and/or resolution on in a timely manner may lead to your removal from the system.
- You are notified via email when you have referrals due for an update.



- If you do not update your referral manager after the numerous *past due* update emails, your leads will be released and reassigned by Opcity. We have no way to undo this action, and once we receive this final email you will be disabled and removed from the Opcity portal.

Notice: Your referrals have been released. [REDACTED]

realtor.com no-reply@realtor.com via sendgrid.net
to: [REDACTED]



- If you fail to notify your title company closing agent that there is a referral due, you will be responsible for completing payment and sending required documents to Opcity. You will also be responsible for additional payment if any amount of referral fee is underpaid. The office will not complete these items for you.
- If you are utilizing a contract to close company or transaction coordinator, it is your responsibility to ensure they are trained and familiar with these additional Opcity requirements.
- Please note and save the below contacts that have been provided to us by Broker Support.

Team	Phone	Email
Accounting	833.201.4040	accountingsupport@opcity.com
Agent Success	844.804.1849	
Partner Support	833.200.0101	support.realtor.com
Realtor.com Support	800.878.4166	support.realtor.com