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REALTYONEGROUP

Where to begin?! Work through these five steps to get the most out of your Moving Concierge & Agent Dashboard

Your first assignment: tour the platform. Find account settings and your vendor list. Have you had any client engagements?

1



2

Edit your profile. Account > Profile > Edit. Do you have a new headshot? Add any social media links? Additional emails?

Click on Add Vendor in top right corner! Add one at a time or use the .csv file to add multiple. Include the logo and URL to stand out from the rest!

3



4

Add a client from the top right corner or send the Homeowner dashboard to your sphere! Download the template, or better yet, we can do it for you!

Share your unique URL everywhere! Add to your signature, Boost on social media, create a QR code for a postcard!

5

