



REALM™

Getting Started Guide

Version June 2024

REALM™ is the ultimate multiple listing platform for real estate sales representatives. This mobile-first, state-of-the-art platform is your one-stop resource as you can manage your listings, conduct market research, gain property intelligence, and communicate with your clients and colleagues. This guide will walk you through how to maximize your account to save you time and streamline your business.



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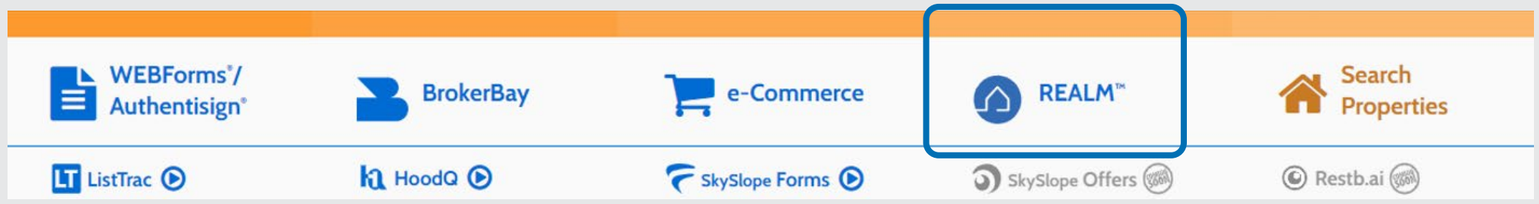
Market Insights & Analytics 41

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Accessing REALM™ on your Desktop

On your desktop, you can access REALM™ through your single sign-on provided by your Real Estate Board's MLS® platform or by using the direct website link as outlined below.

1 **Your Boards Home Page**



2 **App.realmmlp.ca**



Accessing REALM™ on your Mobile Device

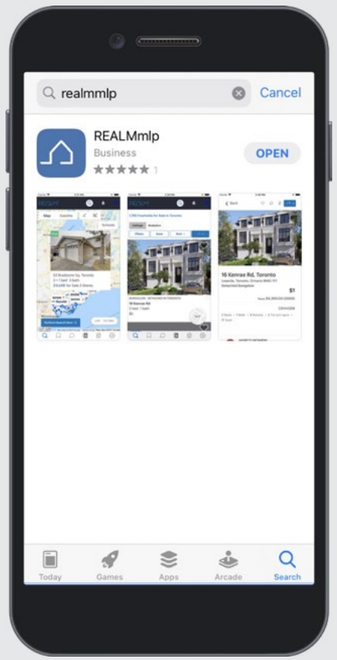
REALM has a mobile app and you can access all of the same features through this app as on your desktop. Here are the steps to download the REALMmlp app:

1 Go to the APP Store/ Google Play or scan the QR code

Download on the App Store

GET IT ON Google Play

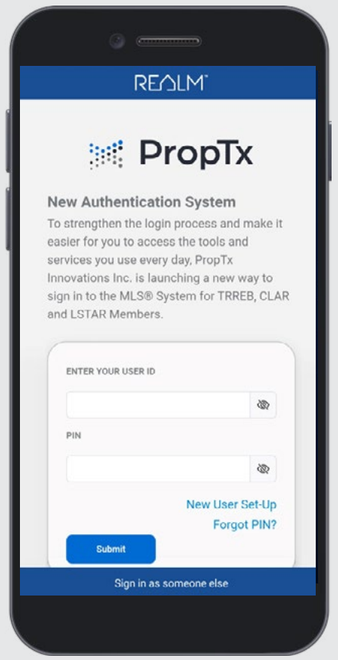
2 Search for REALMmlp and install on your mobile



3 Select Member



4 Login to REALMmlp using your Member ID

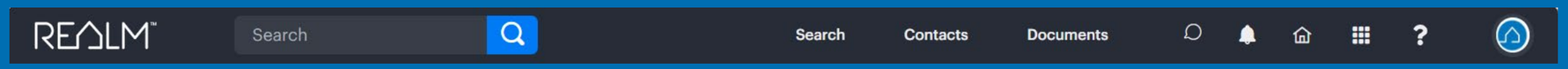


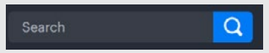
Tip: In REALM you can enable fingerprint login or face id on devices that support Biometrics.

To enable biometric authentication, simply turn on the toggle on the log in screen of the app. In order for this toggle to appear, you must ensure that your mobile device has Face/Fingerprint ID enabled for the Realm App.

Desktop Menu

REALM offers a robust set of actions you can leverage in your workflows to conduct market research, gain property intelligence and connect with your clients and colleagues. Here is a glossary for you to reference:





Universal Search: Search by address to find an active listing, unavailable listing, or land registry.

Search **Search:** Search by filters or the map to find listings or solds.

Contacts **Contacts:** Add a contact or manage your database. Access saved searches, lists and history.

Documents **Documents:** Upload a document to share.

Chat: Send an in-application message to another REALM™ user.

Notifications: Review recent activity.

Resources Menu: Select to access direct links to other resources.

Help: Visit the REALM Help Centre where you will find video tutorials, help articles, and FAQs.

Profile Avatar: Access help, settings, or logout.



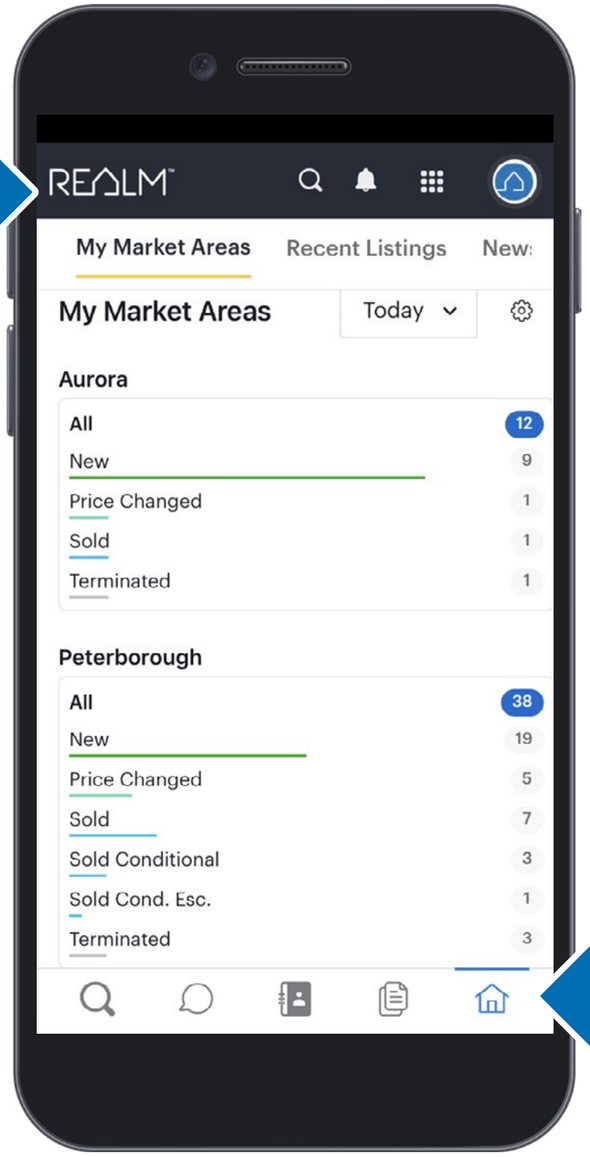
Tip: Select **Show me how** for guided tours.

Show me how

Mobile Menu

Across the top

- Universal Search
- Notifications
- Resources Menu
- Profile Avatar



Tip: Help is available in your profile avatar. Select **Help** to visit the REALM Help Centre where you will find video tutorials, help articles, and FAQs.

- Search
- Chat
- Contacts
- Documents
- Dashboard

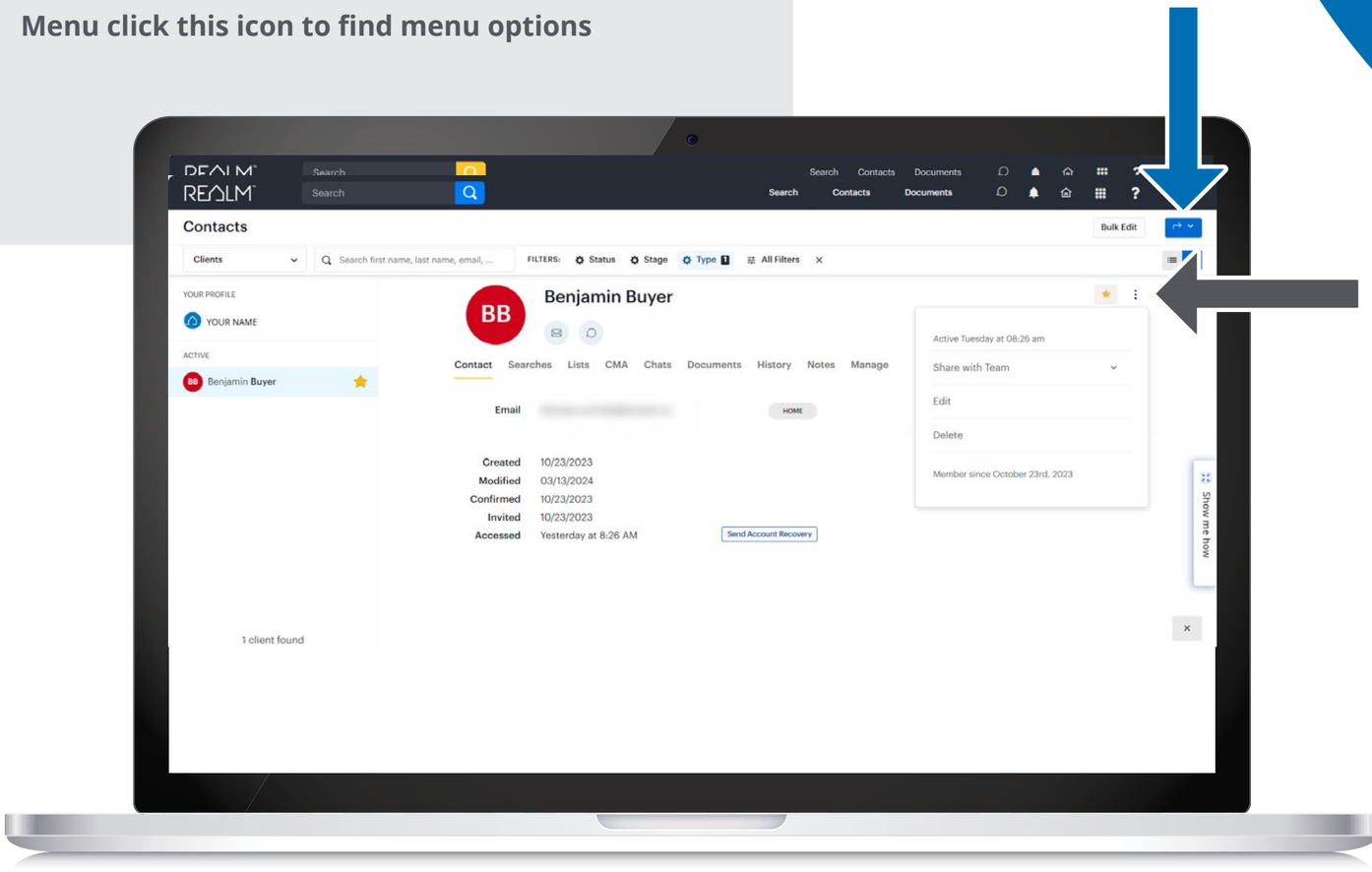
Across the bottom

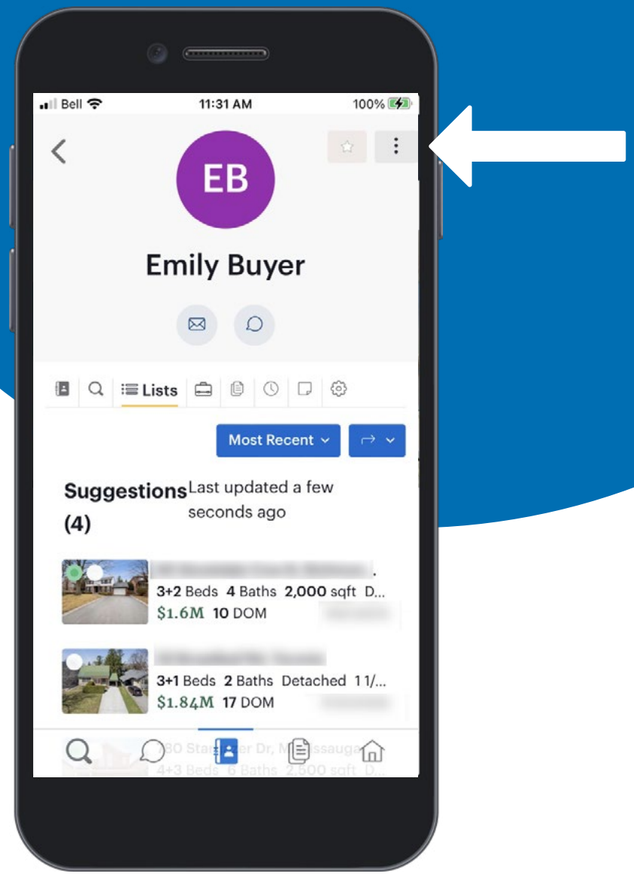
Navigation Tools

Using Desktop & Mobile

Action button – click this to find actions

Menu click this icon to find menu options





Resources Menu

Select to access direct links to other resources.

Enter the desired resource in search to find the link Search

New links to note:

Profile: Update your profile, email templates, account defaults, and notification settings.

REALM CMA: Create a Comparative Market Analysis.

Listing Inventory: View a list of your listings.

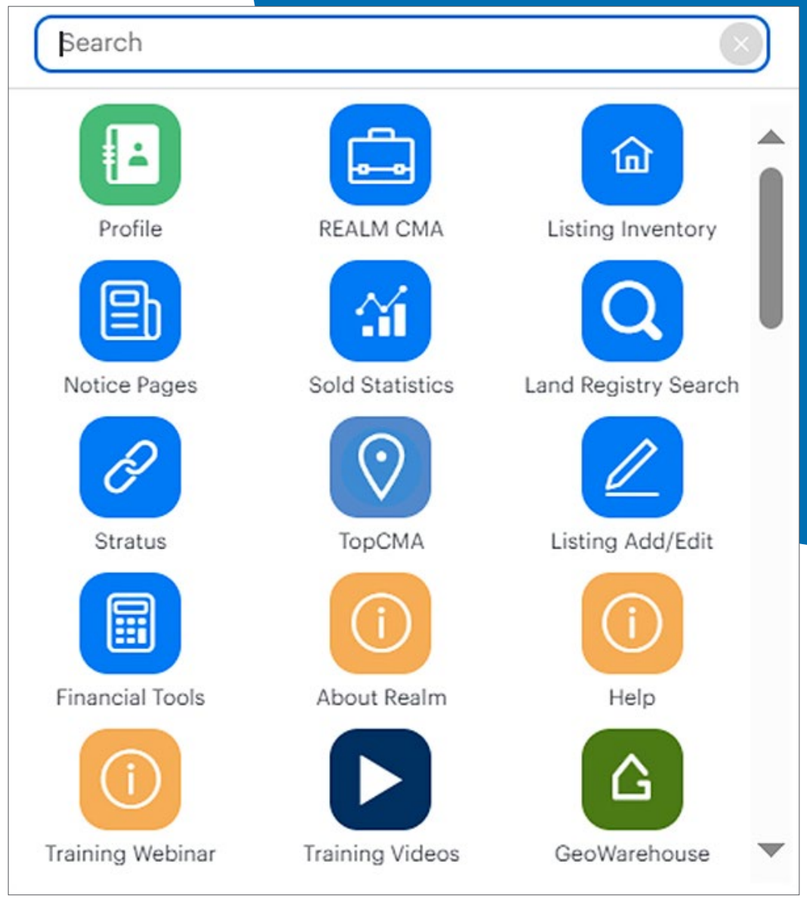
Notices Pages: Generate a report that identifies recent activity in a selected area by status.

Sold Statistics: Find sold statistics by municipality.

Land Registry Search: Search land registry by owner name, address or PIN.

Listing Add/Edit: Select to go to Add/Edit.

Training Videos: Access videos that will make you an expert.



Profile Settings on Desktop

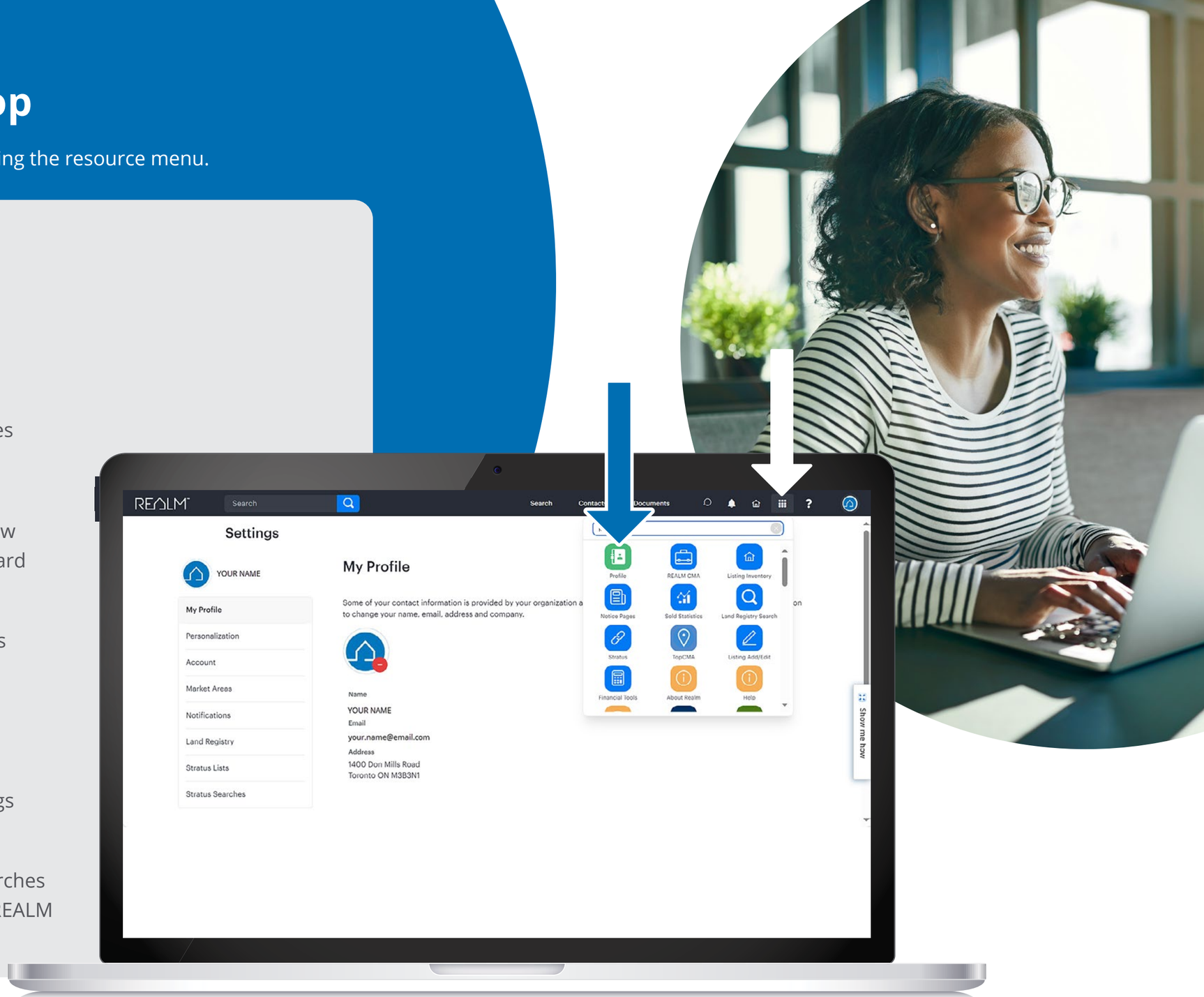
Easily customize your settings with your preferences using the resource menu.

Select  and then profile 

.

Setting options that you may update:

- **My Profile:** Add your photo
- **Personalization:** Edit your email templates
- **Account:** Set up your defaults in REALM
- **Market Areas:** Define market areas to view new and updated listings on your dashboard and notices pages
- **Notifications:** Choose notification options and frequency on an account level
- **Land Registry:** View your report counter and purchases
- **Stratus Lists:** Import your favourite listings and listing carts from Stratus into REALM
- **Stratus Searches:** Import your saved searches and prospect searches from Stratus into REALM



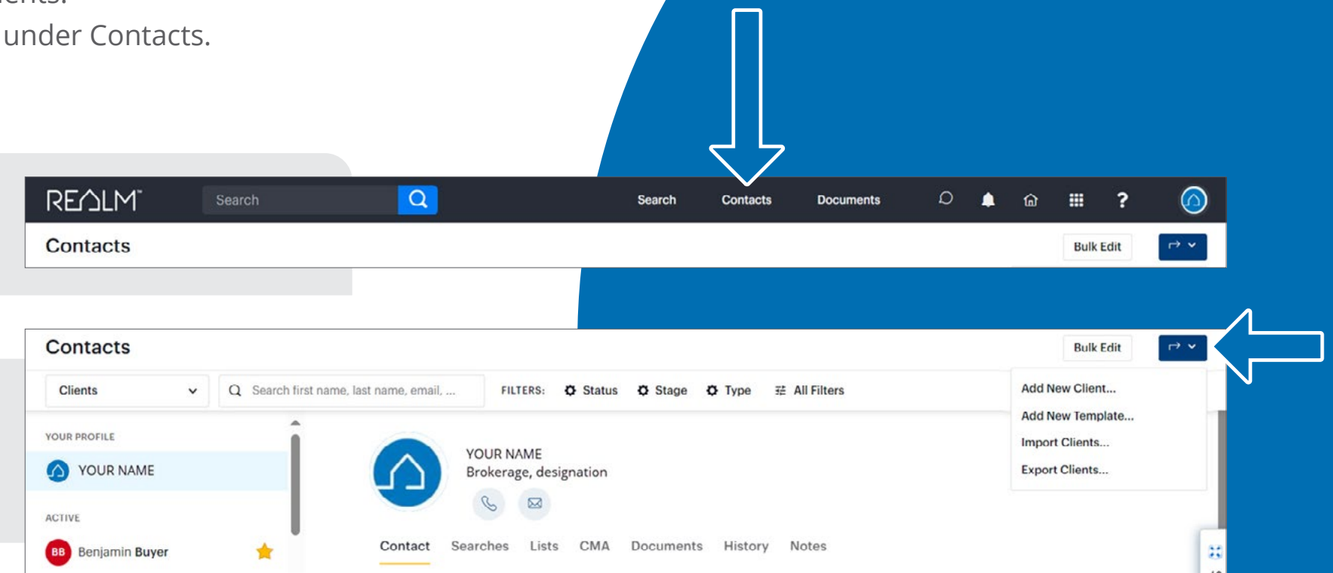
Contacts Desktop

REALM™ offers several communication features to help you work with your clients.
To leverage these functions efficiently, add your prospects/clients to REALM™ under Contacts.

Here are the steps to add a contact to your database:

1 Select **Contacts** from the menu.

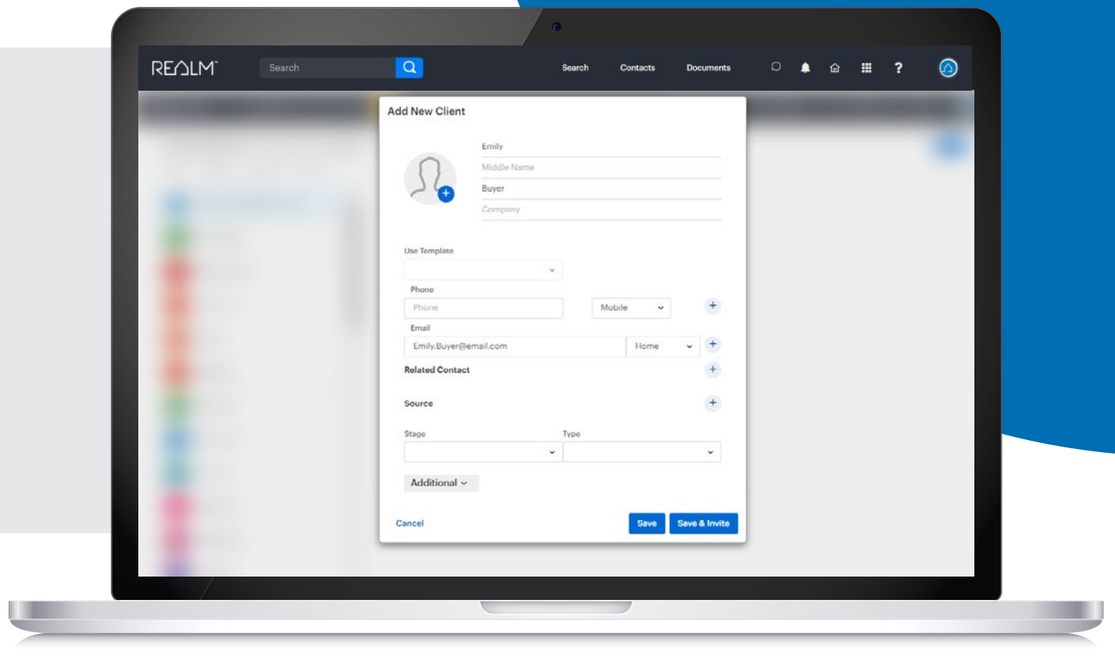
2 Select [↱] and then **Add New Client**.



3 Enter the first name, last name and email address.

4 Select **Save** to add to your database.

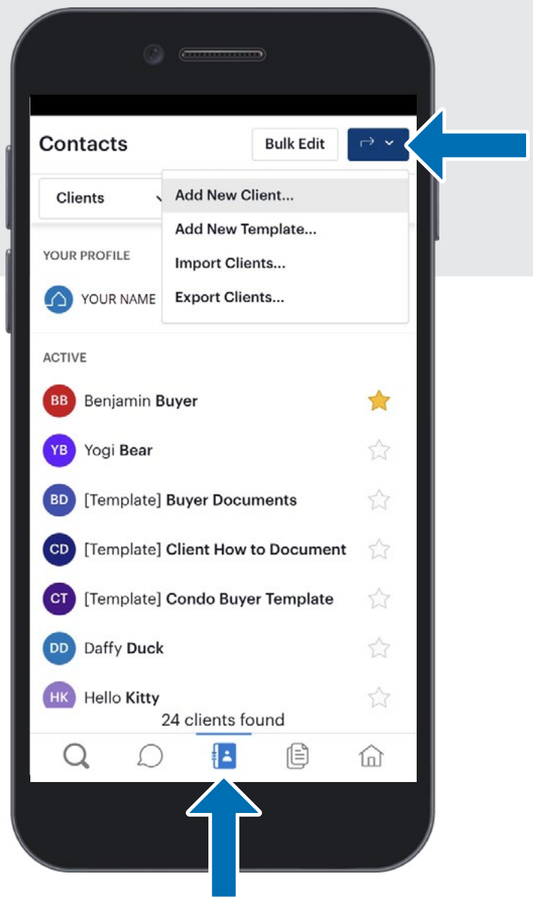
5 Select **Save & Invite** to invite the contact to use REALM™



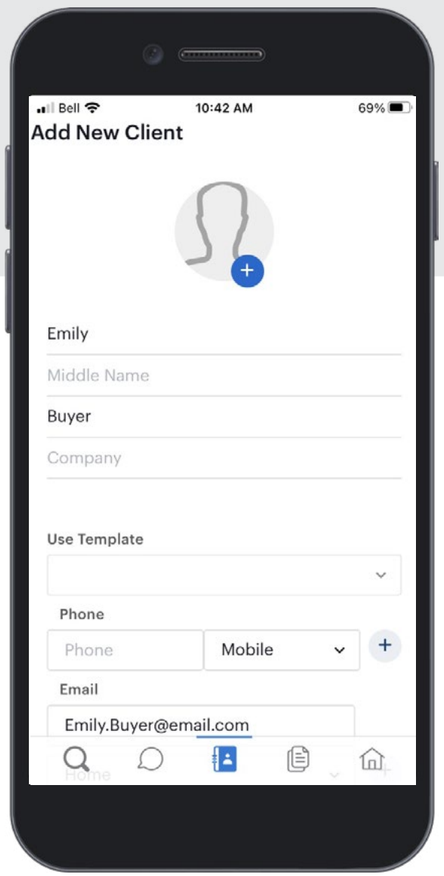
Contacts Mobile

Steps to add a prospect/client to your database

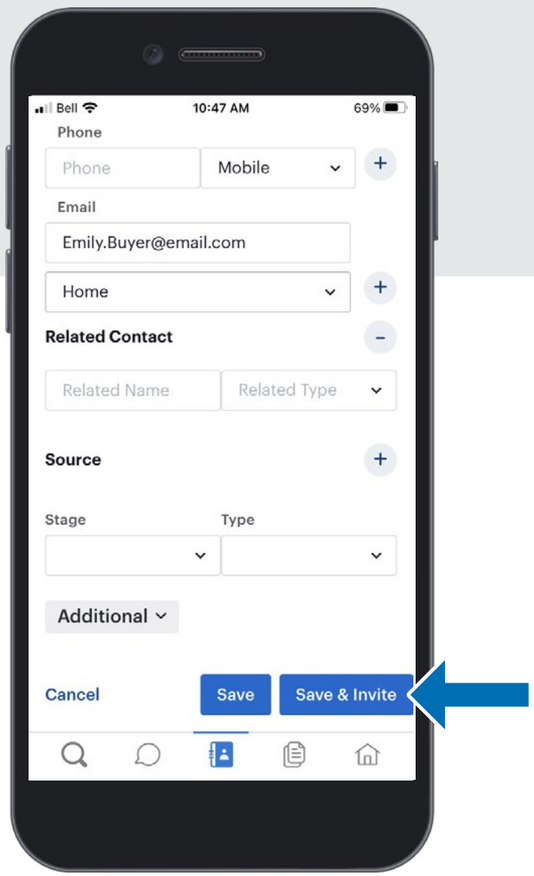
1. Select  from the menu at the bottom
2. Select  and then **Add New Client**



3. Enter the first name, last name and email address



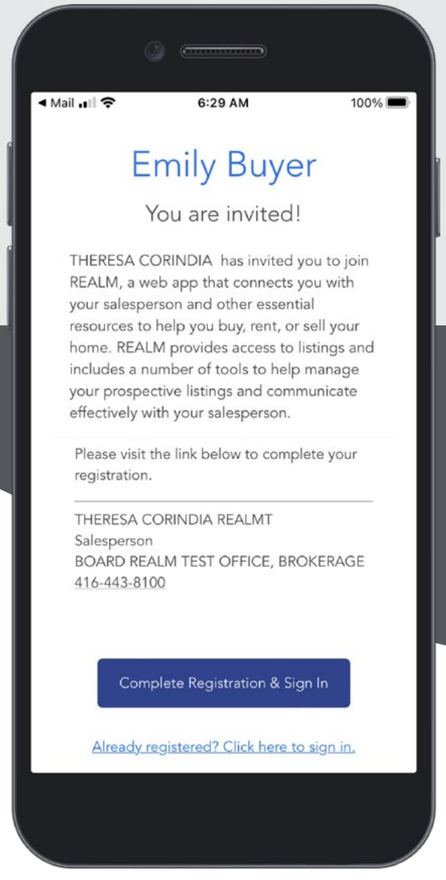
4. Select **Save** to add to your database
5. Select **Save & Invite** to invite the contact to use REALM™



What your client will receive when you invite them to REALM™

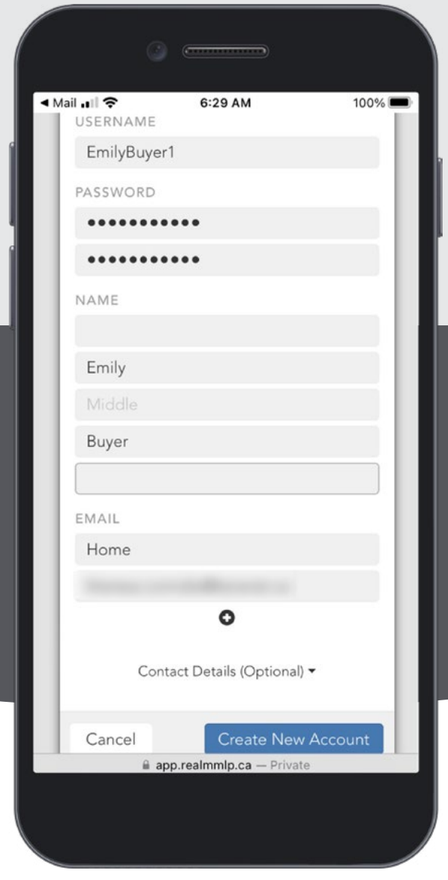
1

An email with instruction on how to complete registration and login



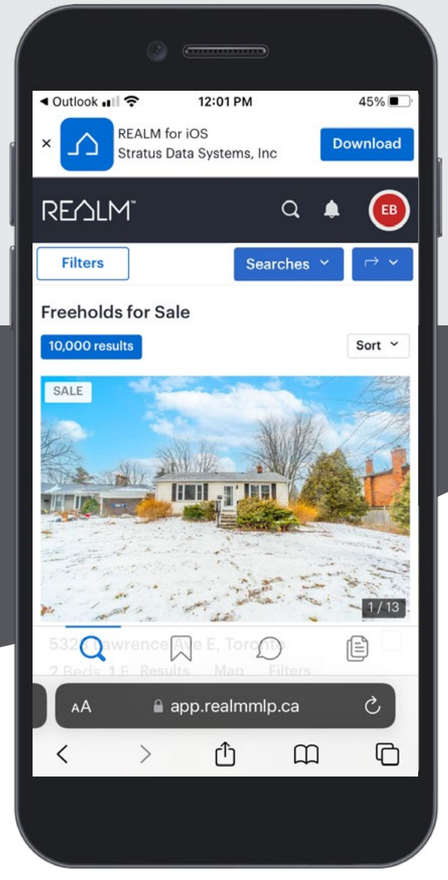
2

They are presented a form to choose a user id and password



3

They will be logged into REALM on their browser and presented an option to download the REALMmlp App

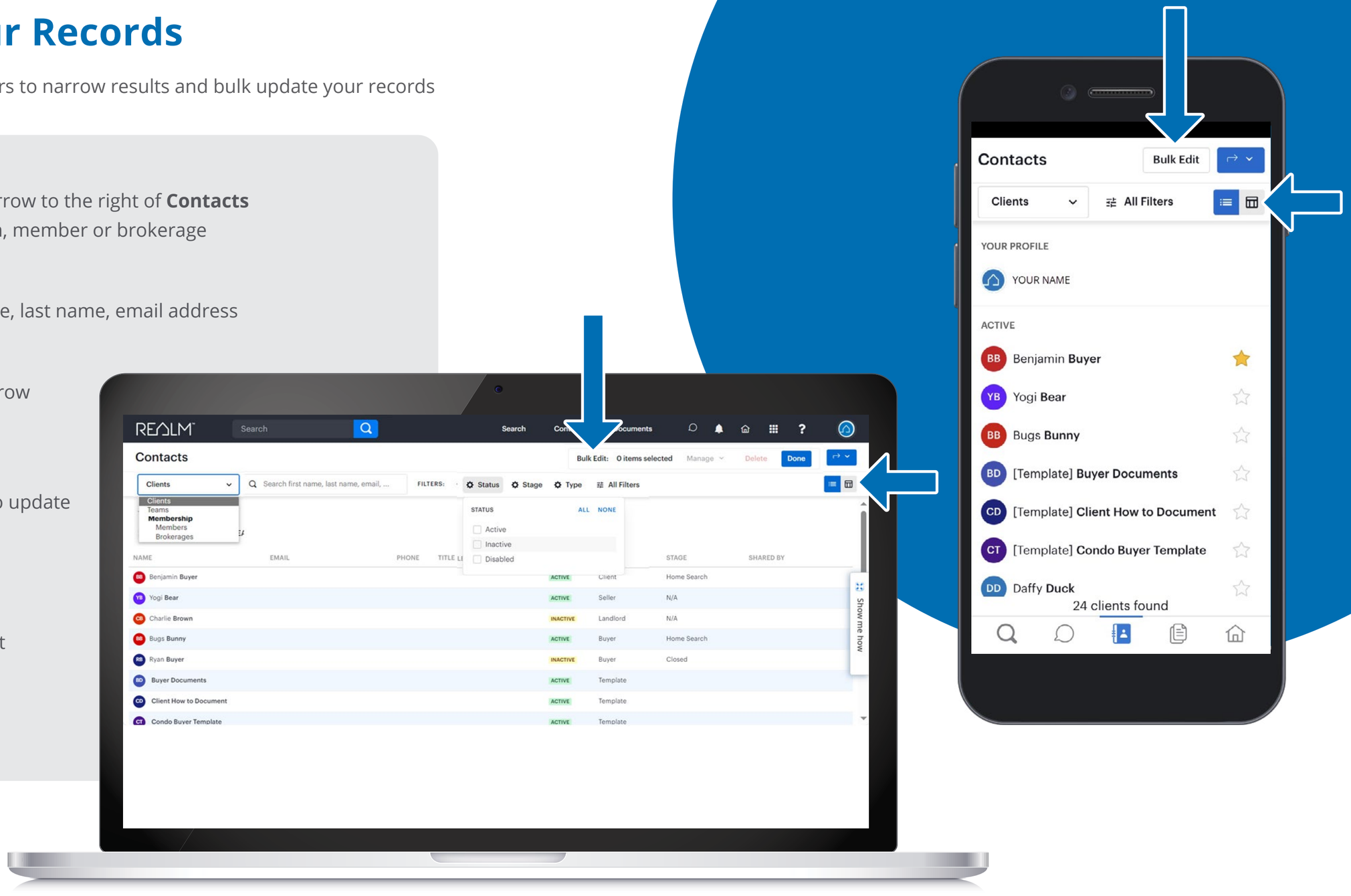


NOTE: You can customize the default invitation.

Managing Your Records

Easily find contacts, select filters to narrow results and bulk update your records

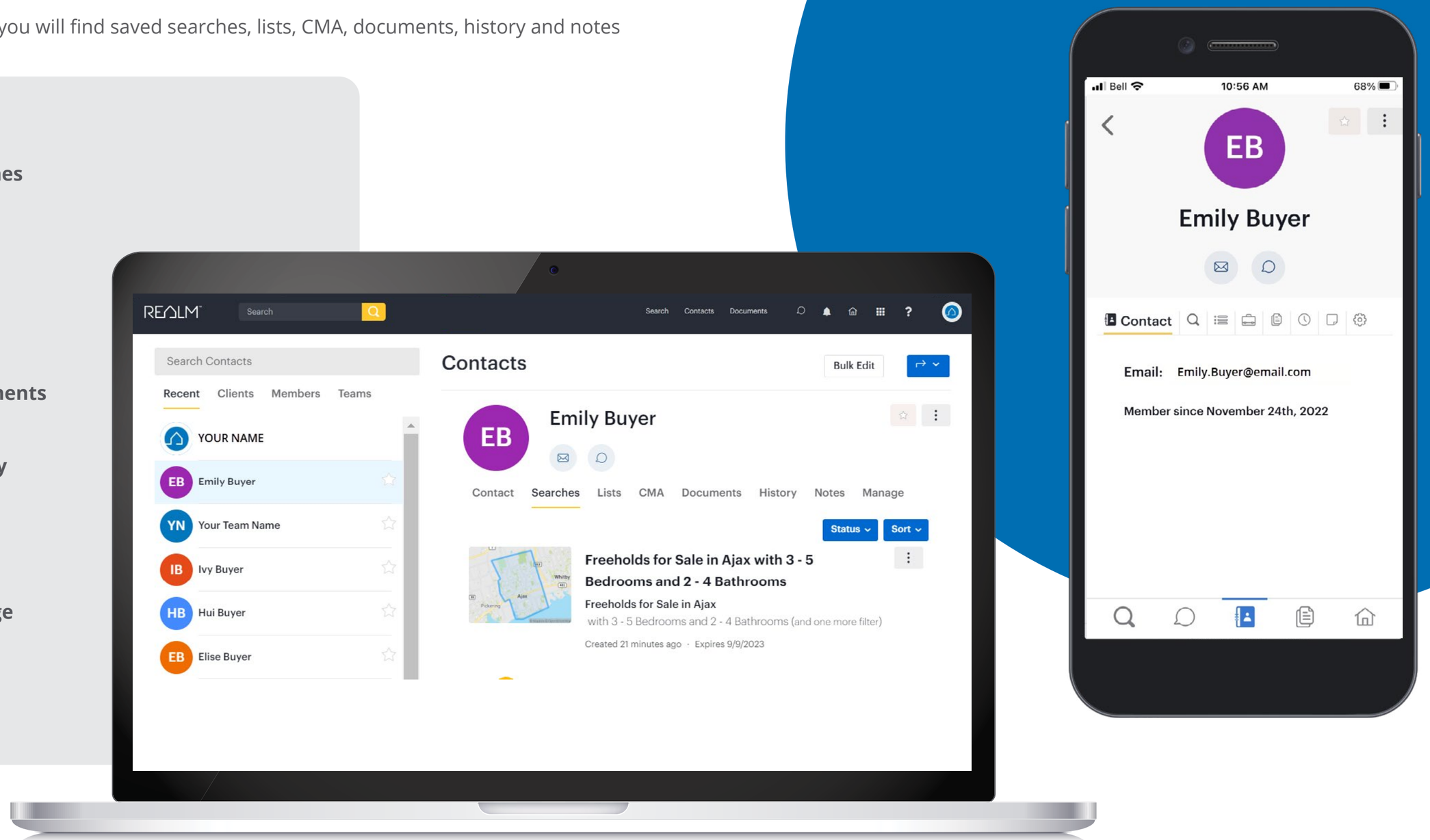
1. Choose the down arrow to the right of **Contacts** to search for a team, member or brokerage
2. Search for first name, last name, email address
3. Select a filter to narrow the records
4. Select **Bulk Edit** to update multiple records at the same time
5. View records in a list or card view



Managing Your Records

In a contact record you will find saved searches, lists, CMA, documents, history and notes

- Searches
- Lists
- CMA
- Documents
- History
- Notes
- Manage

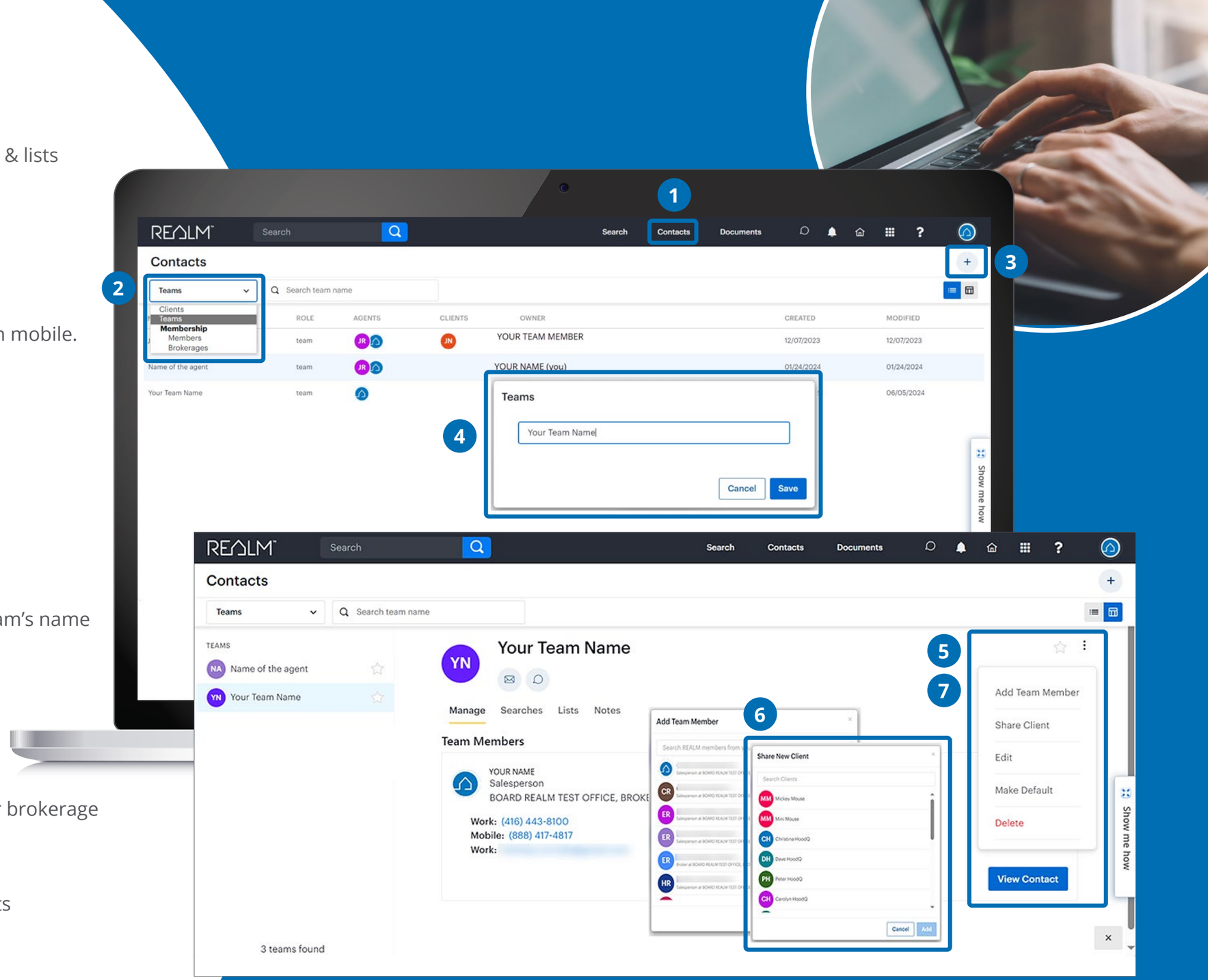


Teams

A Team is used to share clients, their saved searches & lists with colleagues in your brokerage

Using Desktop & Mobile

1. Select Contact from the menu. icon on mobile.
2. Select **Teams** from the menu on the left
3. Select + in the top right of the window
4. A Teams window will appear, enter your team's name
5. Select ⋮ and Add Team Member
6. Select one or multiple colleagues from your brokerage
7. Select ⋮ and add one or multiple contacts



Universal Search

The Universal Search Bar is visible at the top of the screen. It can be used to search by address, MLS® System number, or property identification number (PIN). To search multiple MLS® System numbers at a time, separate them with a space.

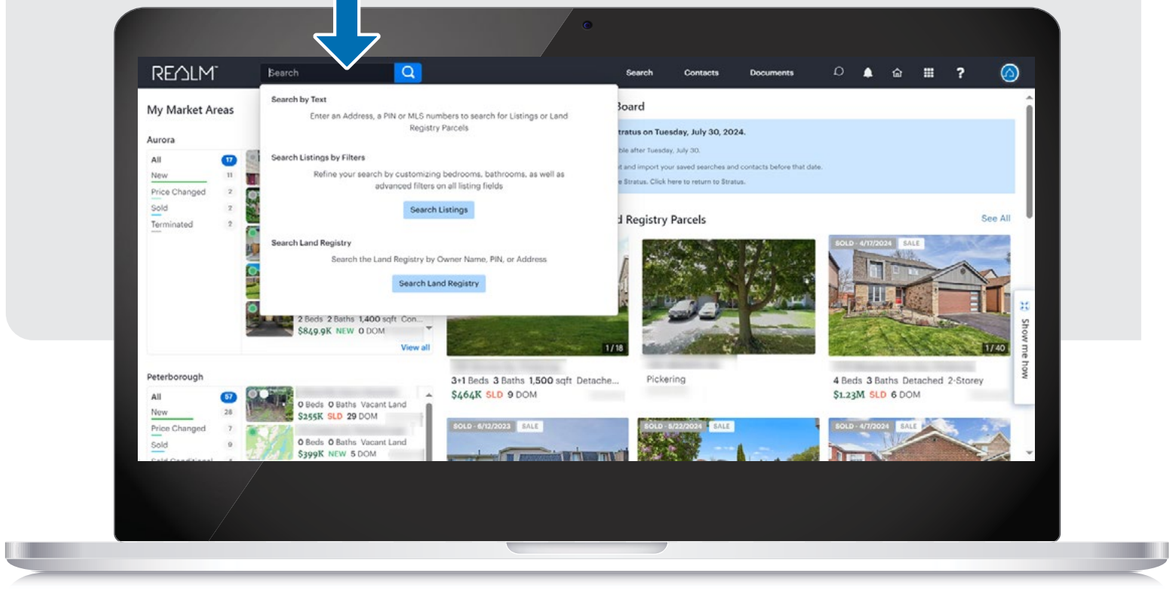
Desktop

Search by address to find:

- Active listings
- Unavailable listings
- Land registry

Search by MLS ID to find a listing



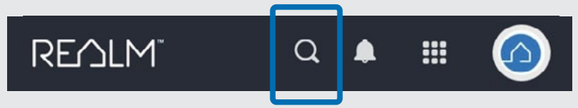


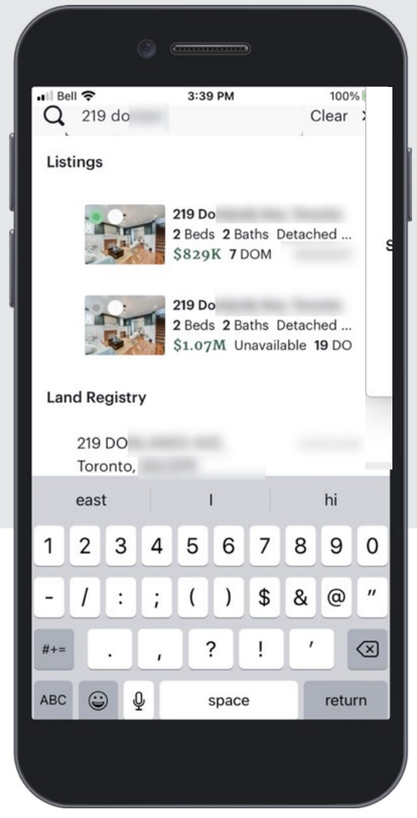
Mobile

Search by address to find:

- Active listings
- Unavailable listings
- Land registry

Search by MLS ID to find a listing

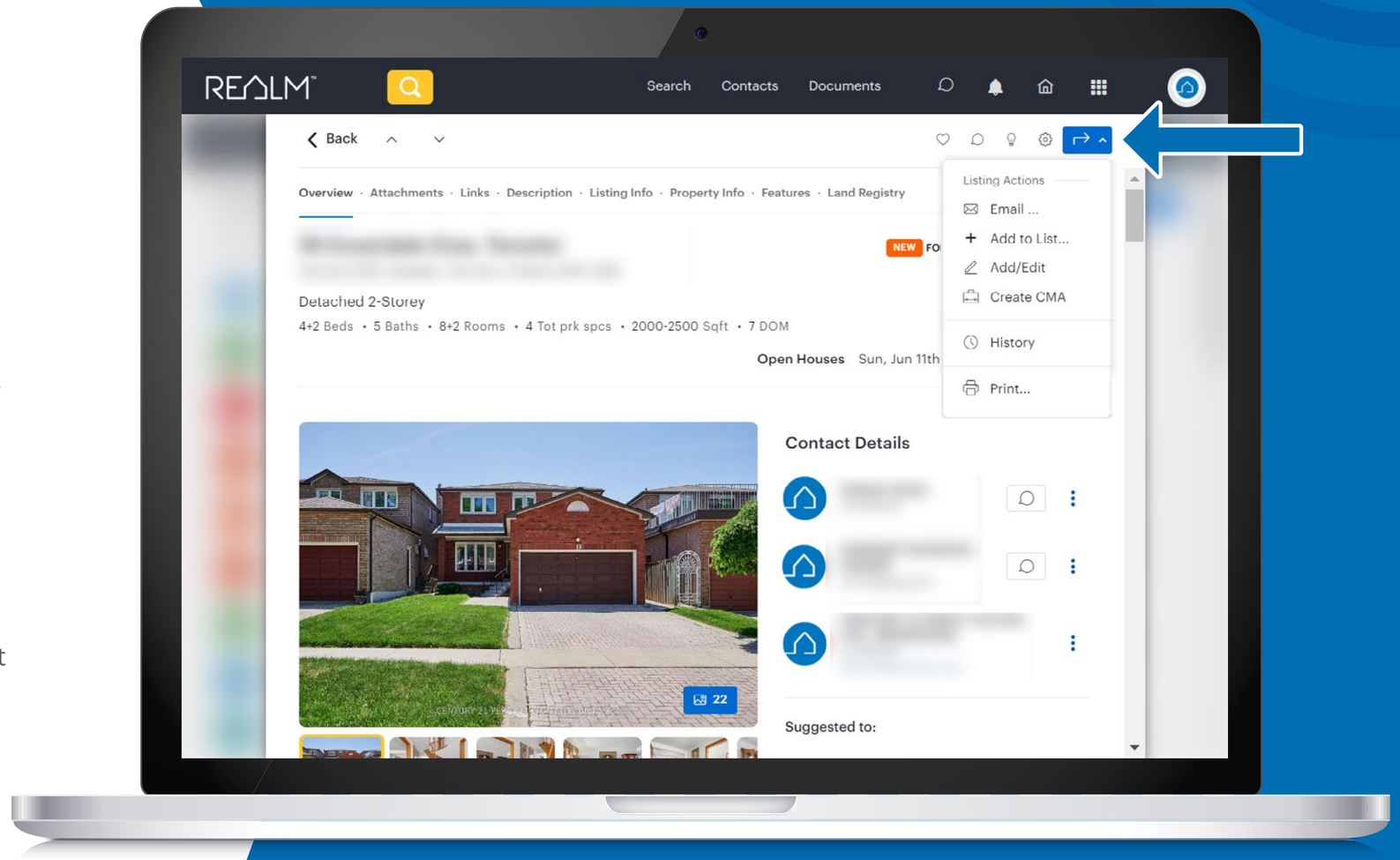




Listing Actions - Desktop

1 Select ↱ and choose from:

- **Email:** Send a client version of the listing
- **Add to List:** Keep track of properties
- **Add/Edit:** Update your listing
- **Create CMA:** Using the selected property
- **History:** View, export as PDF or print the history of the listing
- **Print:** Adjust settings and print a broker full or client full (select **broker full–sheet** for a printout on one page)
- **Like:** Select to save the property to your likes list
- **Chat:** Send an in-app message to a contact, team or salesperson who uses REALM
- **Suggest:** Suggest a property to a contact who uses REALM (instead of email
- **Detail view setting:** Change the listing format



Tip: A listing emailed to a contact in your database will be added to the contacts suggestions list.

Mobile Listing Action

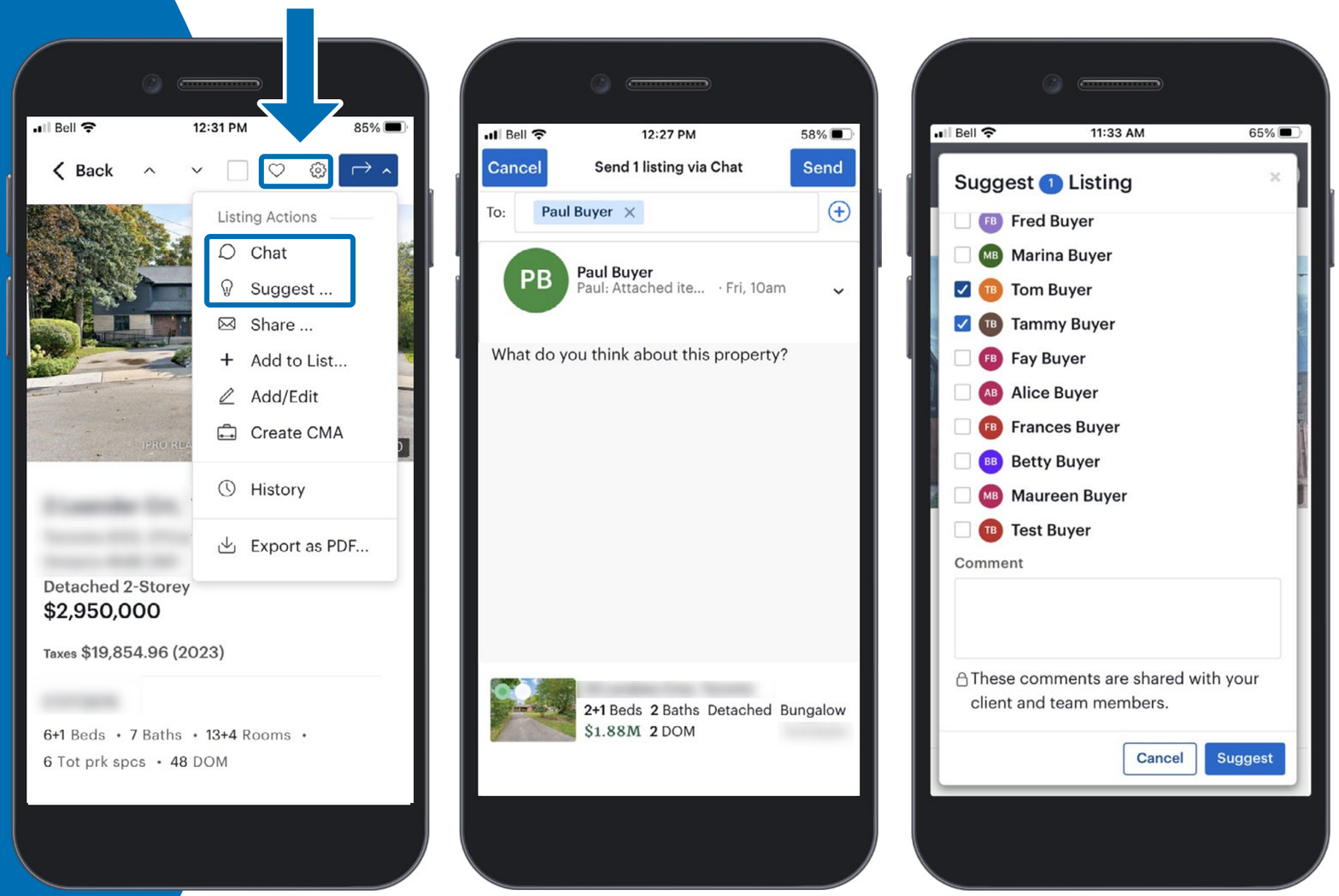
Using Desktop & Mobile

Like: Select to add to your likes in Saved

Detail view setting: Change the listing format

Chat: Send an in-app message to a contact, team or salesperson who uses REALM

Suggest: Suggest a property to a contact who uses REALM (instead of email)

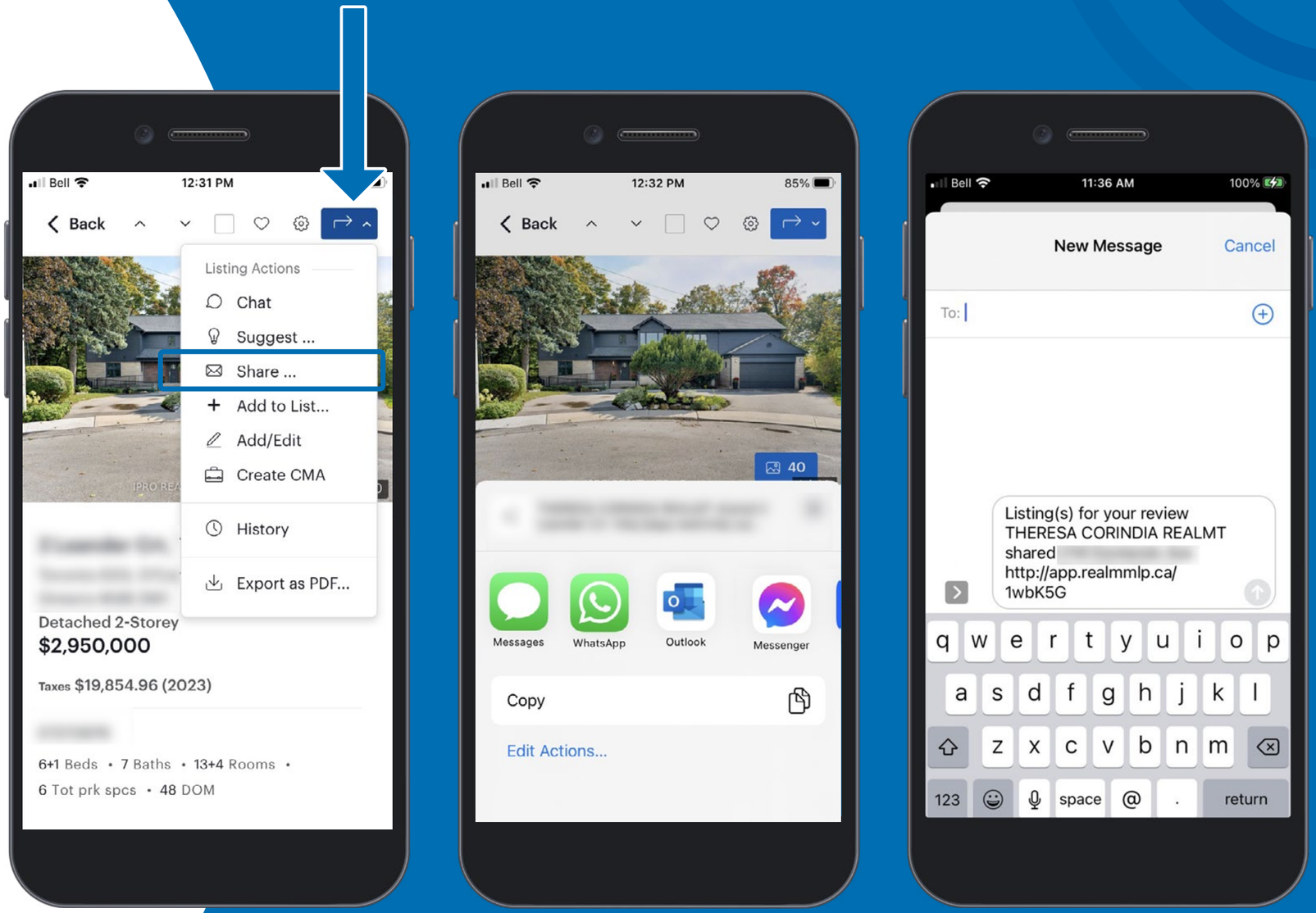


Listing Actions - Share

1. Select 

2. Select **Share** to find a list of apps on your mobile device such as:

   - **Text message**
   - **Email**
   - **WhatsApp**



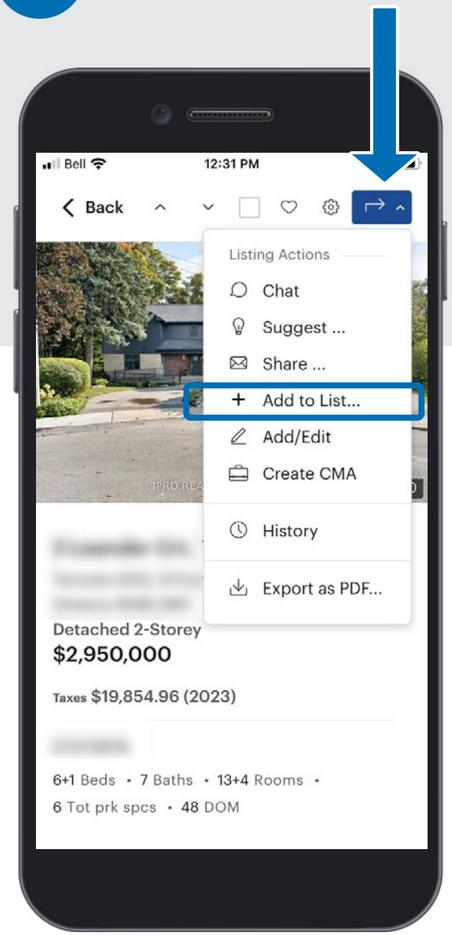
Tip: When you share a listing from the mobile app it will not be added to the contacts suggestions list. Add these listings to a list to help keep track of them.

Listing Actions - Add to List

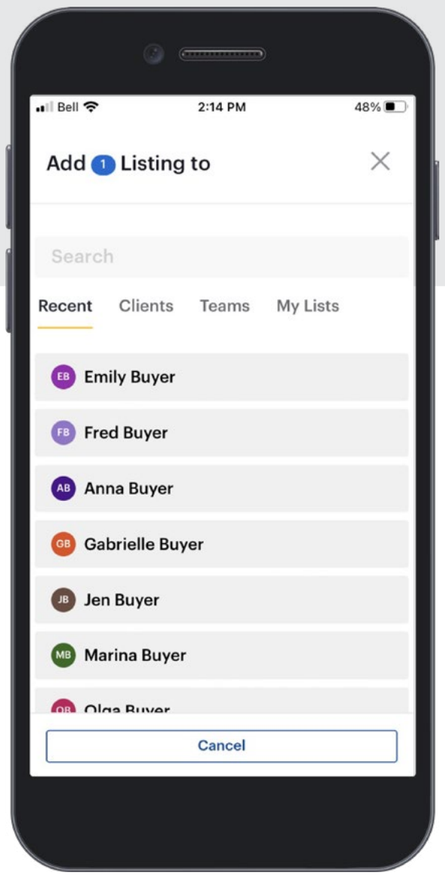
Tip: Saved lists can be found in your contact record.

1 Select 

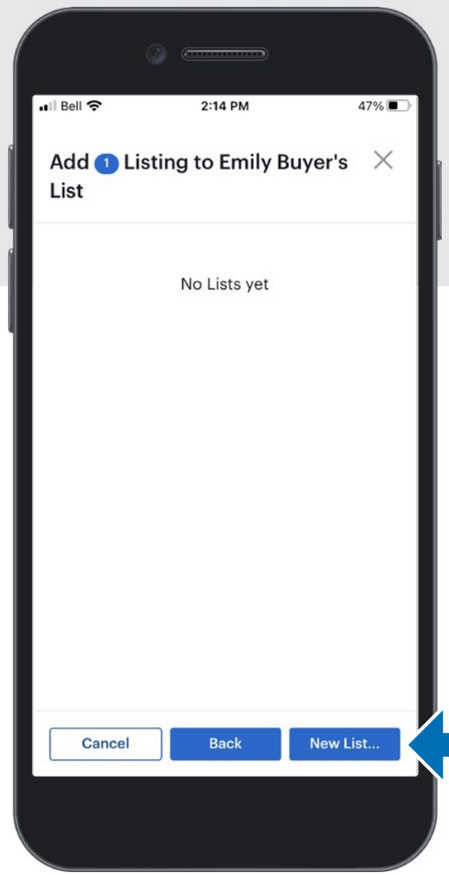
2 Select + Add to List...



3 Select your client

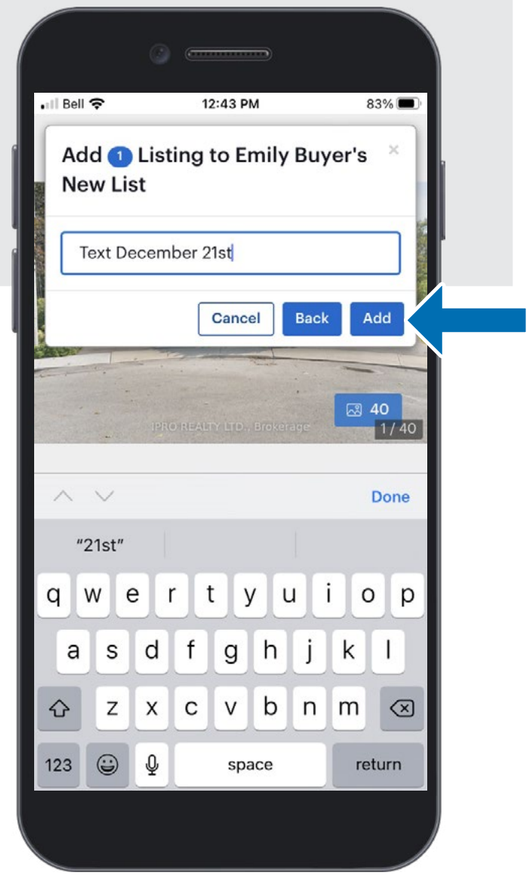


4 Click on **New List**



5 Enter a list name

6 Click on **Add**

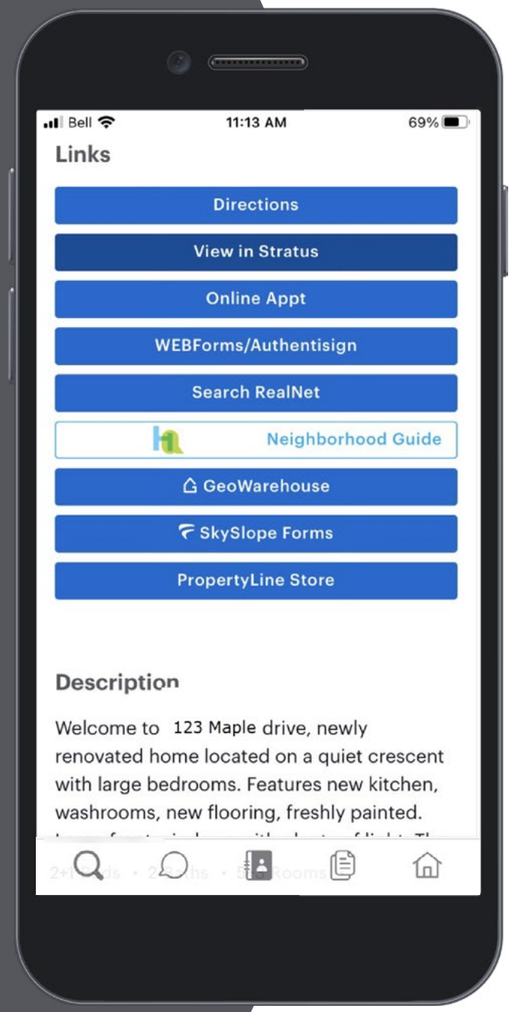


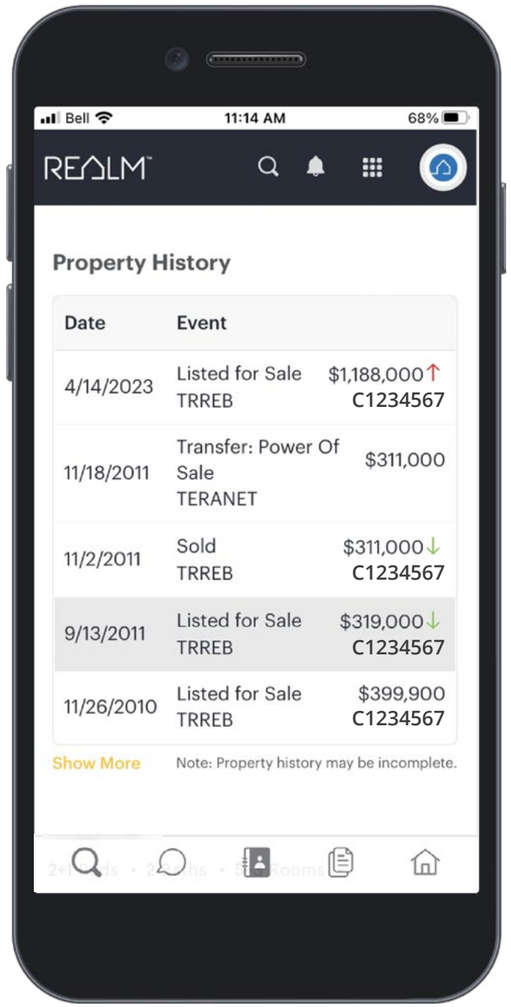
Review Listing Details

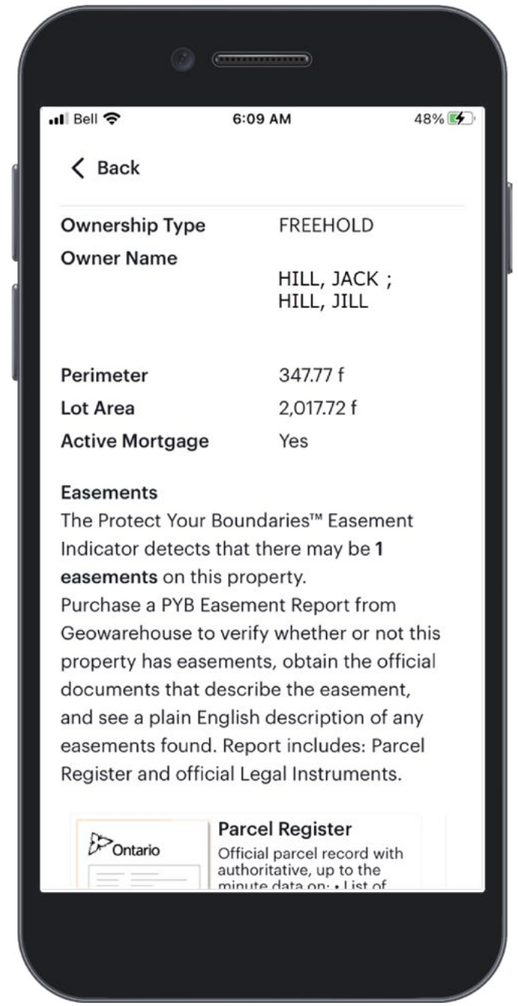
Using Desktop & Mobile

Scroll though the listing and find:

- Links
- Complete property history
- Land registry details







Search Desktop

REALM™ offers several map views with search capabilities. Select your preferred view using the Layout tool.

Choose from various layouts and search using filters and the map window

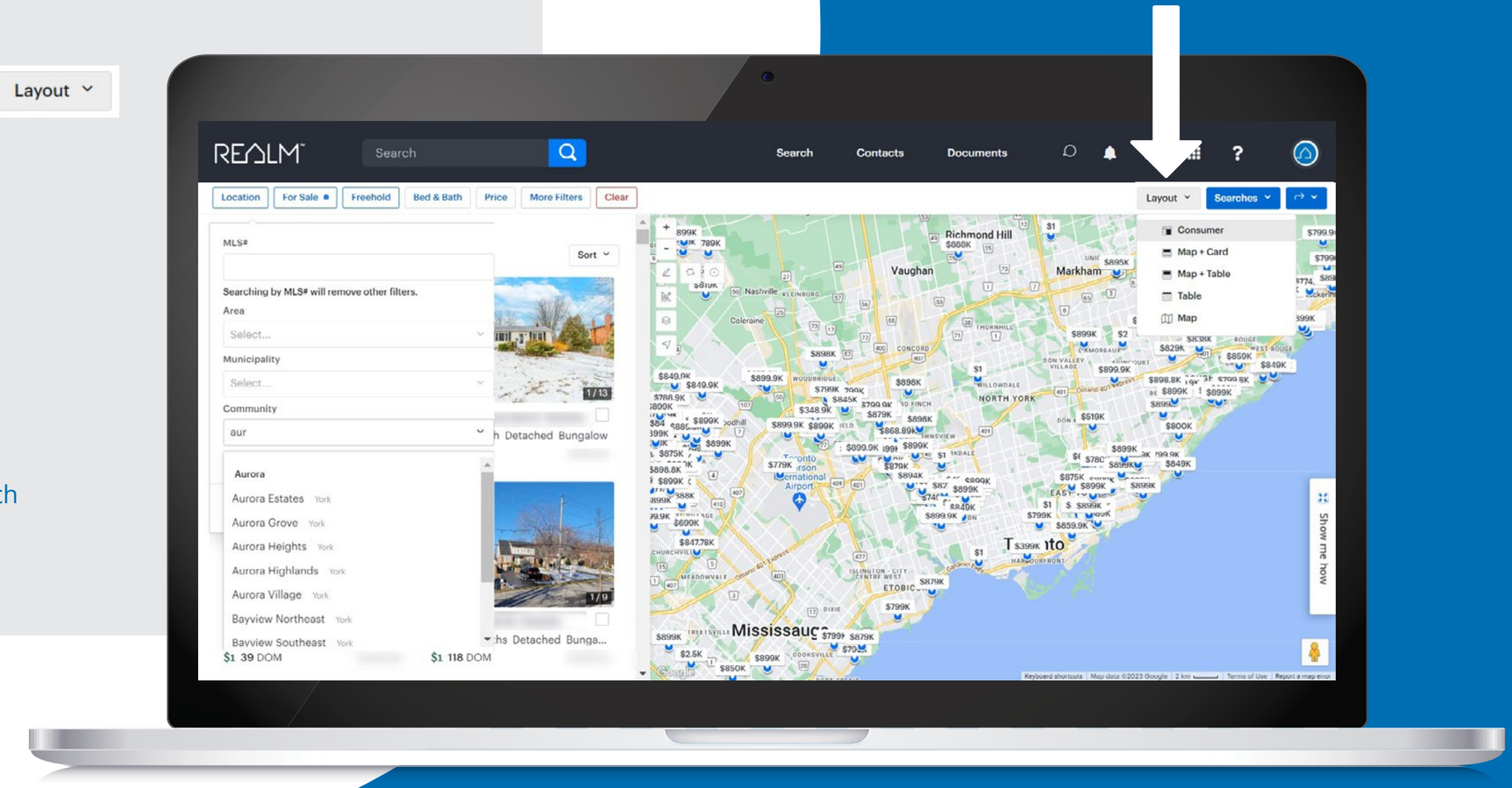
To select a layout:

1. Select the down arrow to the right of **Layout** ⌄
2. Select the desired layout

Search using Filters:

Leverage the filters to narrow your search.

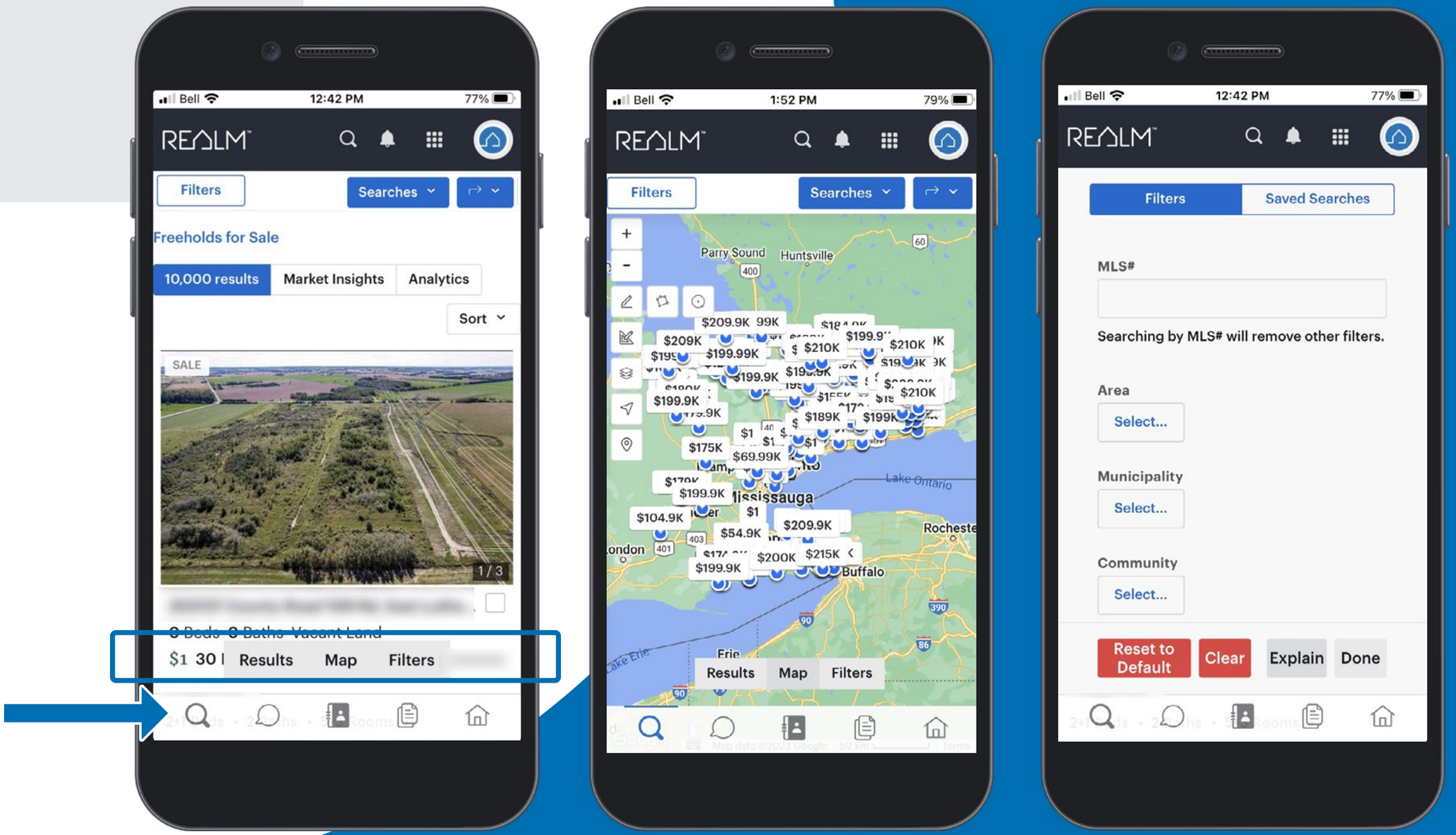
Tip: When choosing a location, you can search by community without first identifying the Area or Municipality.



Search Mobile

Select from the menu at the bottom of the app and select from:

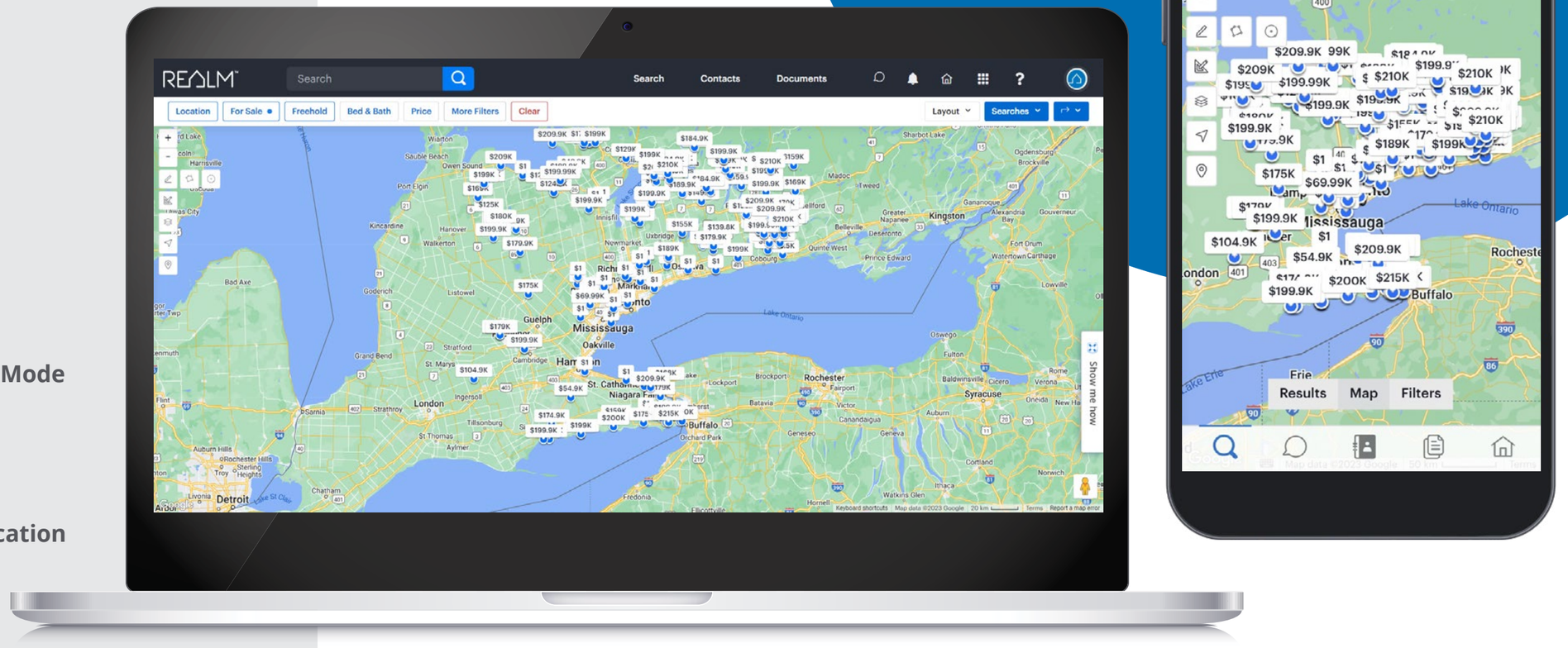
Results **Map** **Filters**



Search using Map Tools

Desktop & Mobile

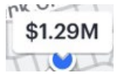
- Zoom in
- Zoom out
- Toggle draw mode
- Draw a polygon
- Draw a circle
- Toggle Measurement Mode
- Map layers icon
- Show your current location
- Jump to a location



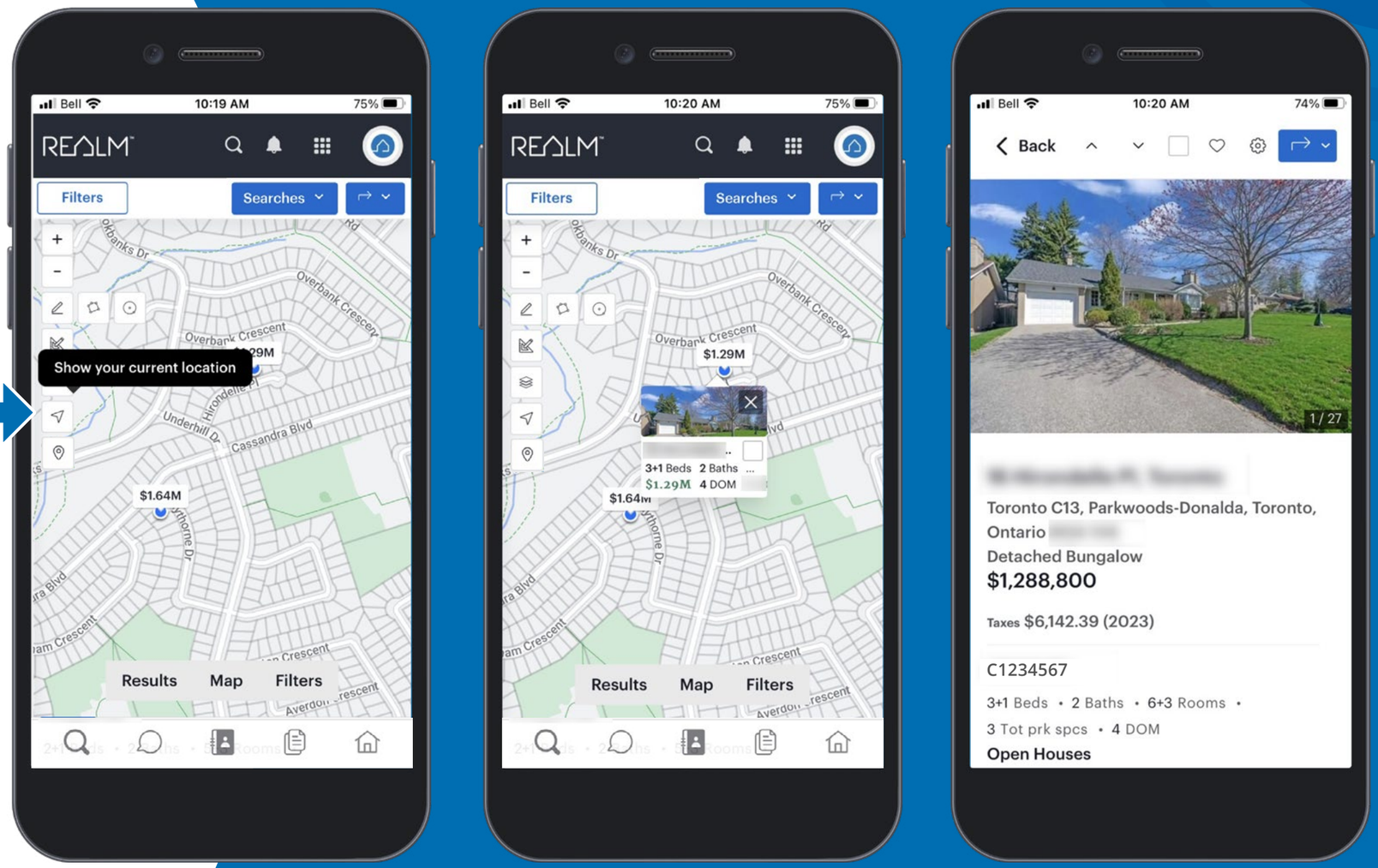
Tip: Search by an address, intersection or location (such as school, place of worship, transit station, etc.) and the city to go to the desired location on the map.

Find listings in the immediate area

Easily search listing using your current location to quickly see all the listings that are available near you.

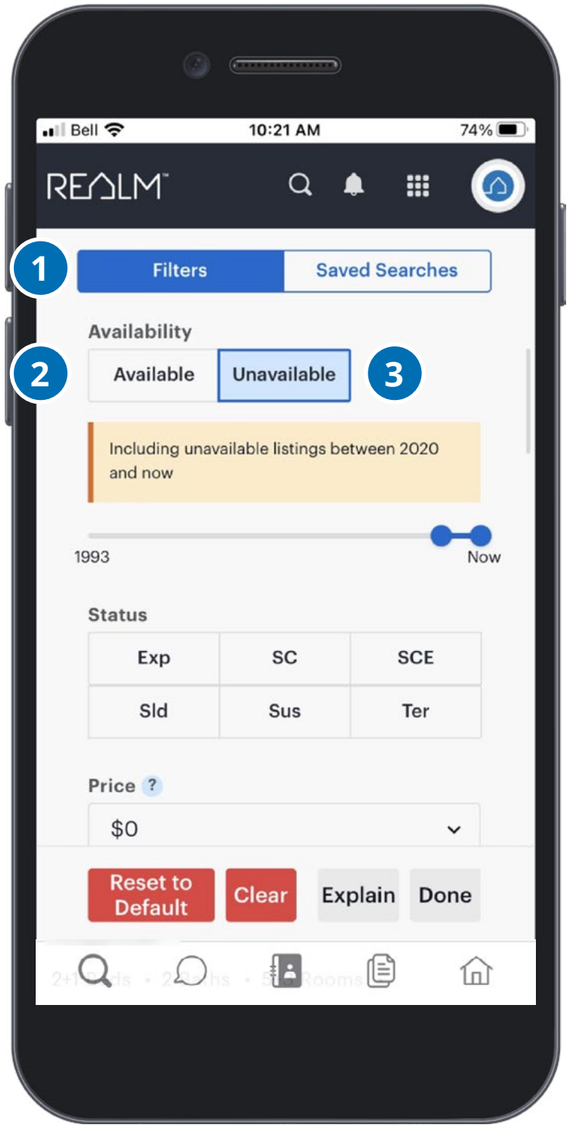
1. Select 
2. Adjust the map window.
3. Tap on the listing 

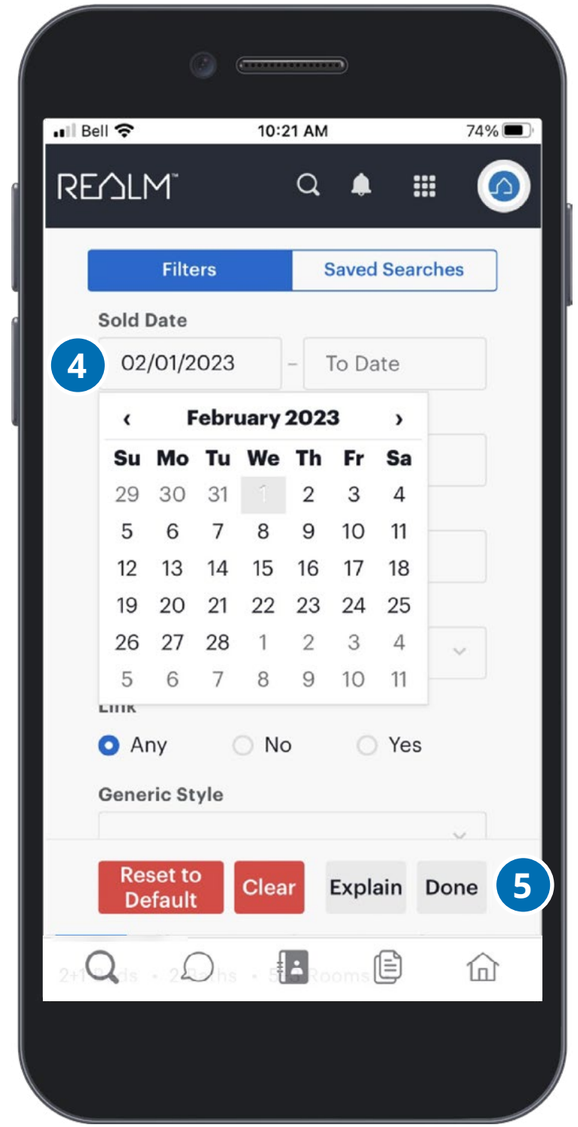
4. Tap on the information window to open the listing



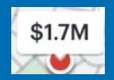
Easily find solds in the same area

1. Select **Filters**
2. Tap on **Available** to remove this selection
3. Tap on **Unavailable** to select it
4. Scroll to **Sold Dates** and enter a **From Date**
5. Select **Done**





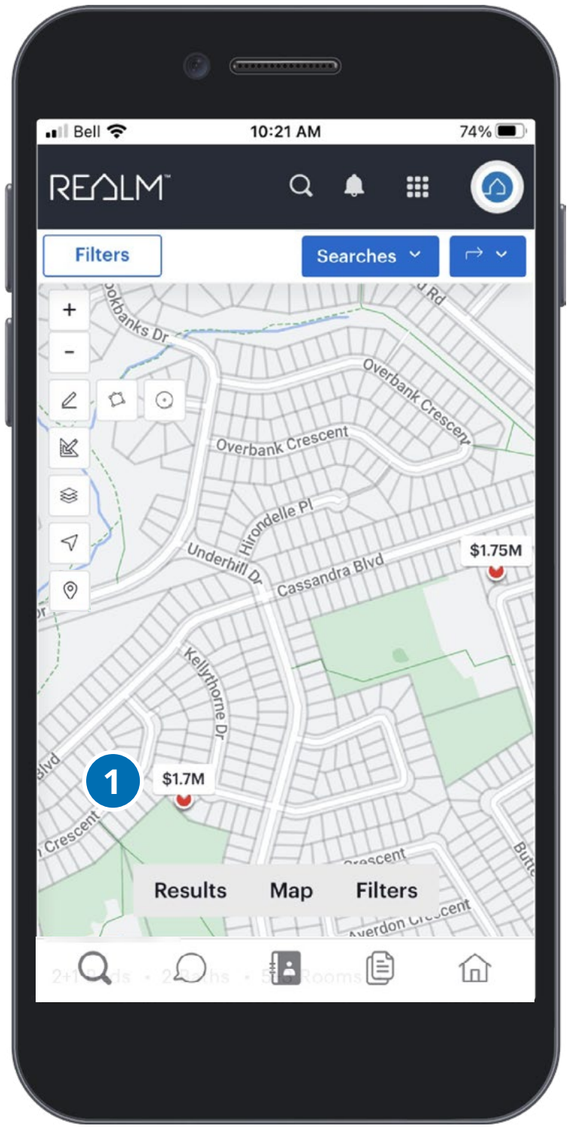
Easily find solds in the same area

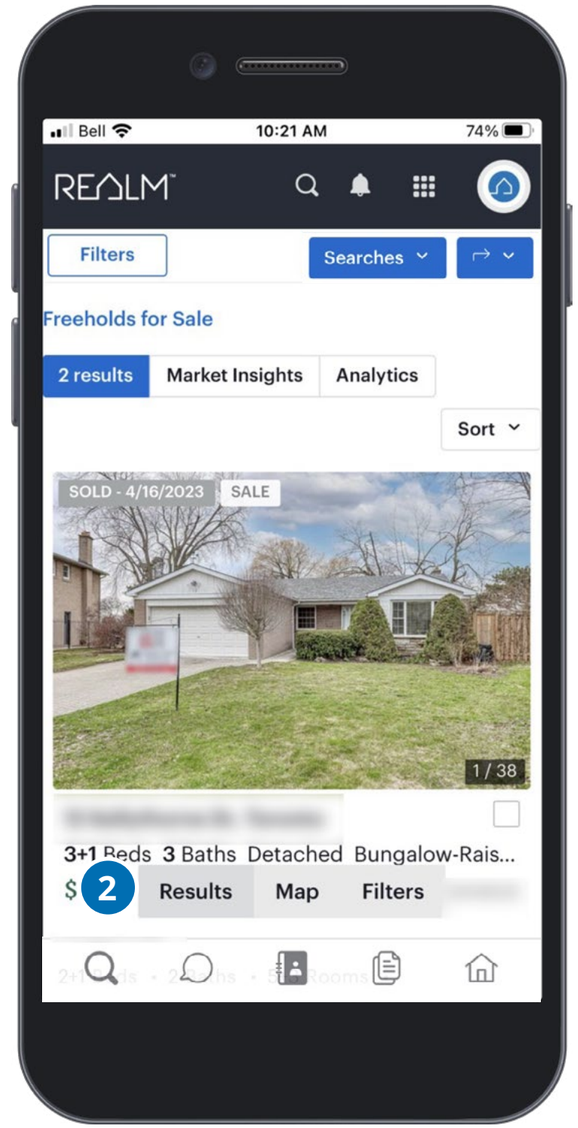
1. Select the sold record 

to open

2. OR Select **Results** to review the list of properties

Note: the **Sold** date will be shown in the top left corner of the image of the property.





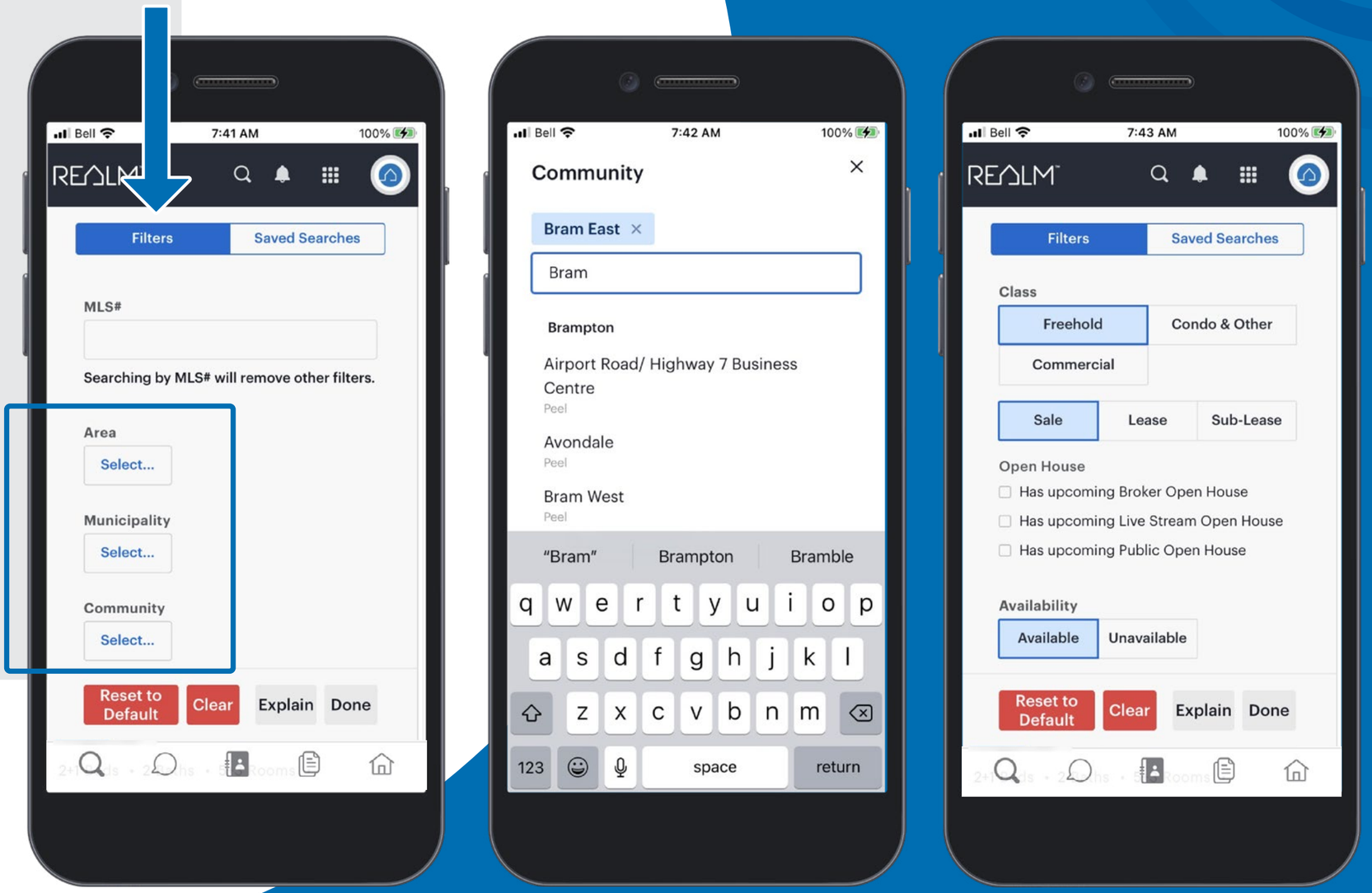
Search Using Filters

Enter criteria to find a property

1. Select **Filters**

2. Select an **Area, Municipality** or **Community**

3. Continue down the window and choose all desired filters

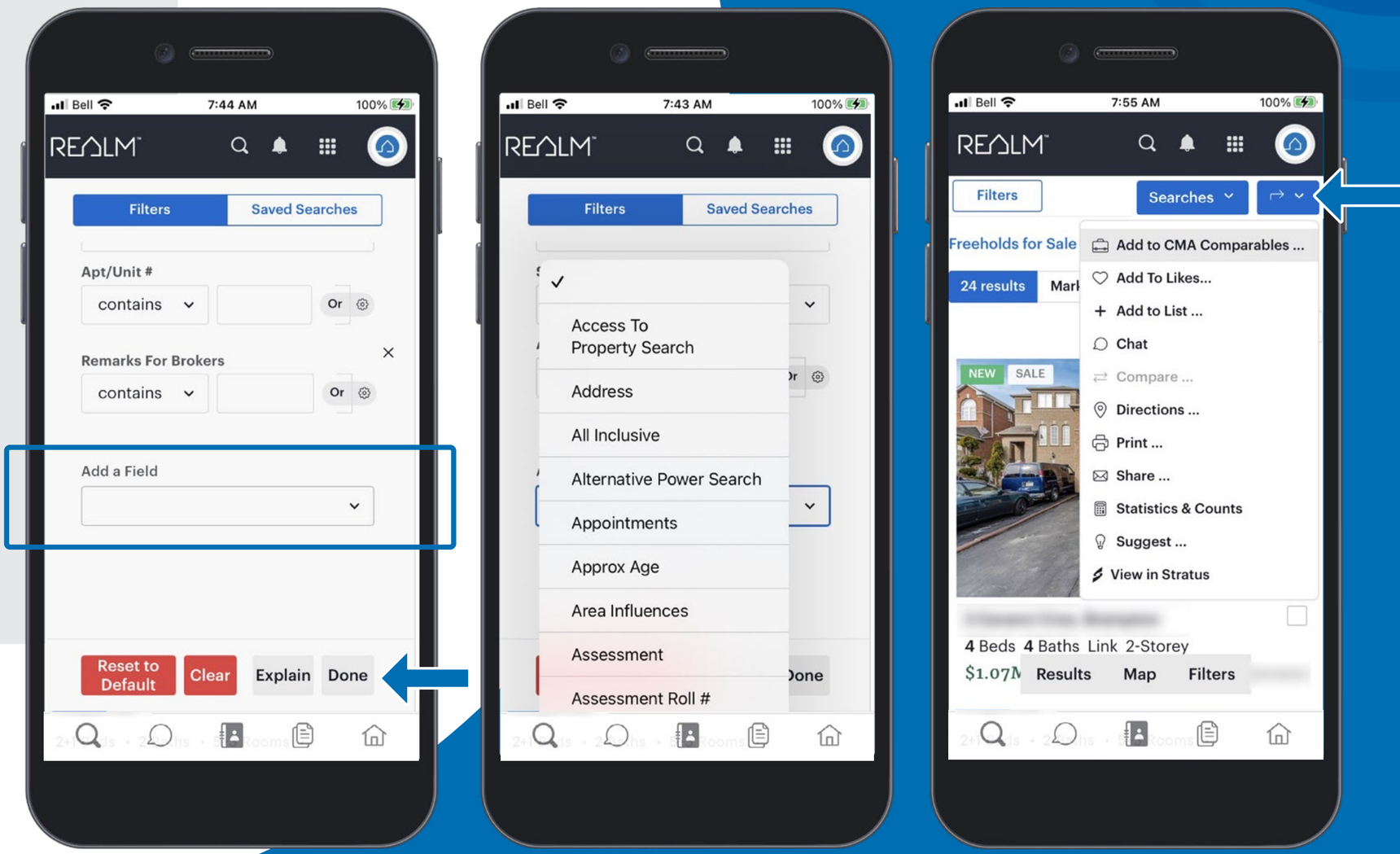


Search Using Filters

4. If you don't see a desired filter, select **Add a Field** to find and select it

5. Select **Done**

6. Review the results and select the to action all or place a check in the listing card to action one or multiple results

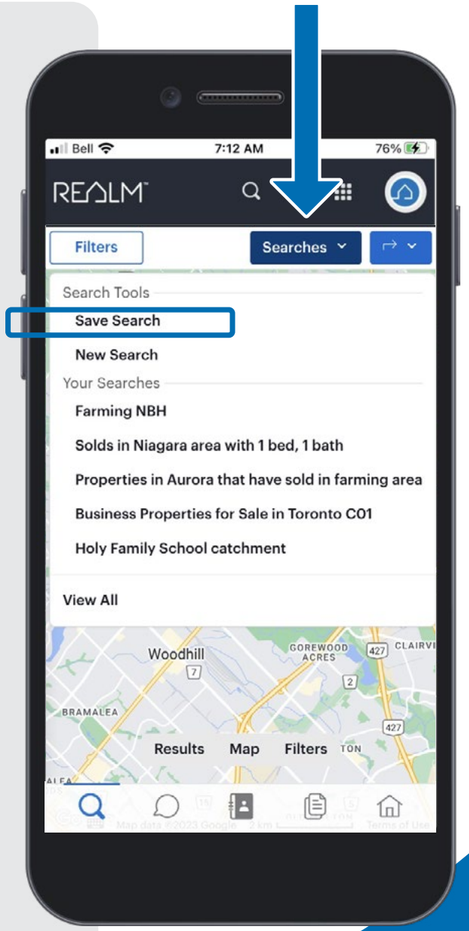


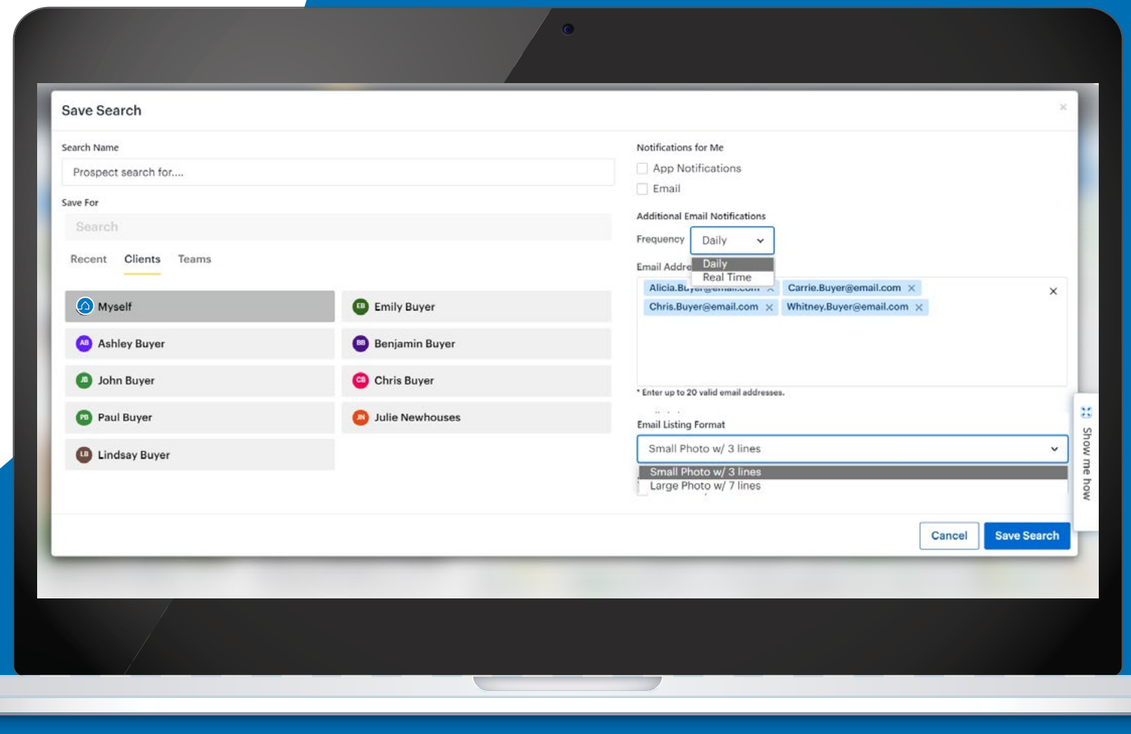
Save Search for Prospects

You can save a search to share new or updated listings via email with prospective clients who are not in your contacts.

Using Desktop & Mobile

1. Select **Searches**
2. Select **Save Search**
3. Enter a **Search Name** and choose **Save For Myself**
4. Under **Notifications for Me**, place a check beside the desired notification type and email frequency if applicable
5. Select a notification frequency for email addresses below
6. Enter up to 20 valid email addresses to sent an individual email to each recipient
7. Select the photo size and format
8. Select **Save Search**



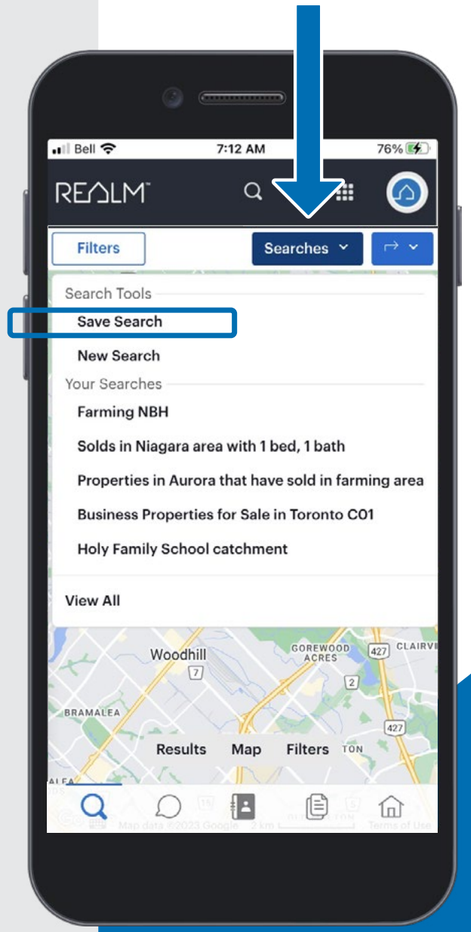


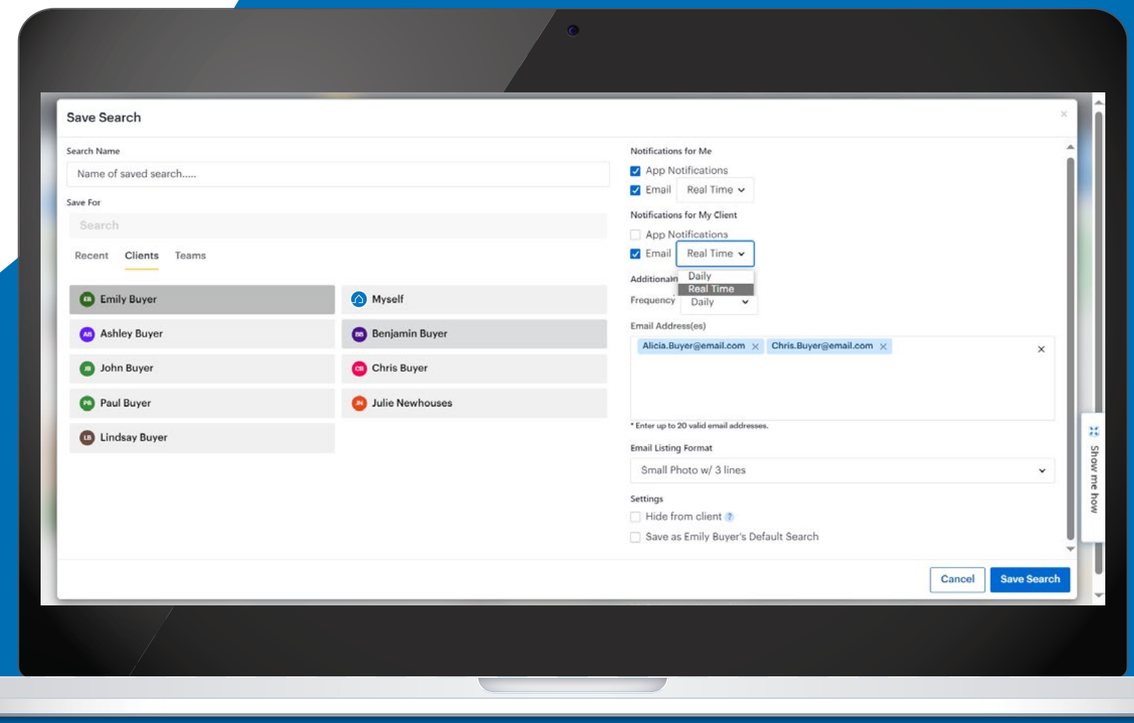
Save Search for Contacts

You can save a search for yourself, a client (contact), or a team to share new listings and updates via email or app notifications.

Using Desktop & Mobile

1. Select **Searches**
2. Select **Save Search**
3. Enter a **Search Name** and choose who to **Save For**
4. Under **Notifications for Me**, place a check beside the desired notification type and email frequency if applicable
5. Select a notification frequency for email addresses below
6. Enter email addresses for related individuals who are not a contact
7. Select the photo size and form
8. Place a check beside the desired settings.
9. Select **Save Search**





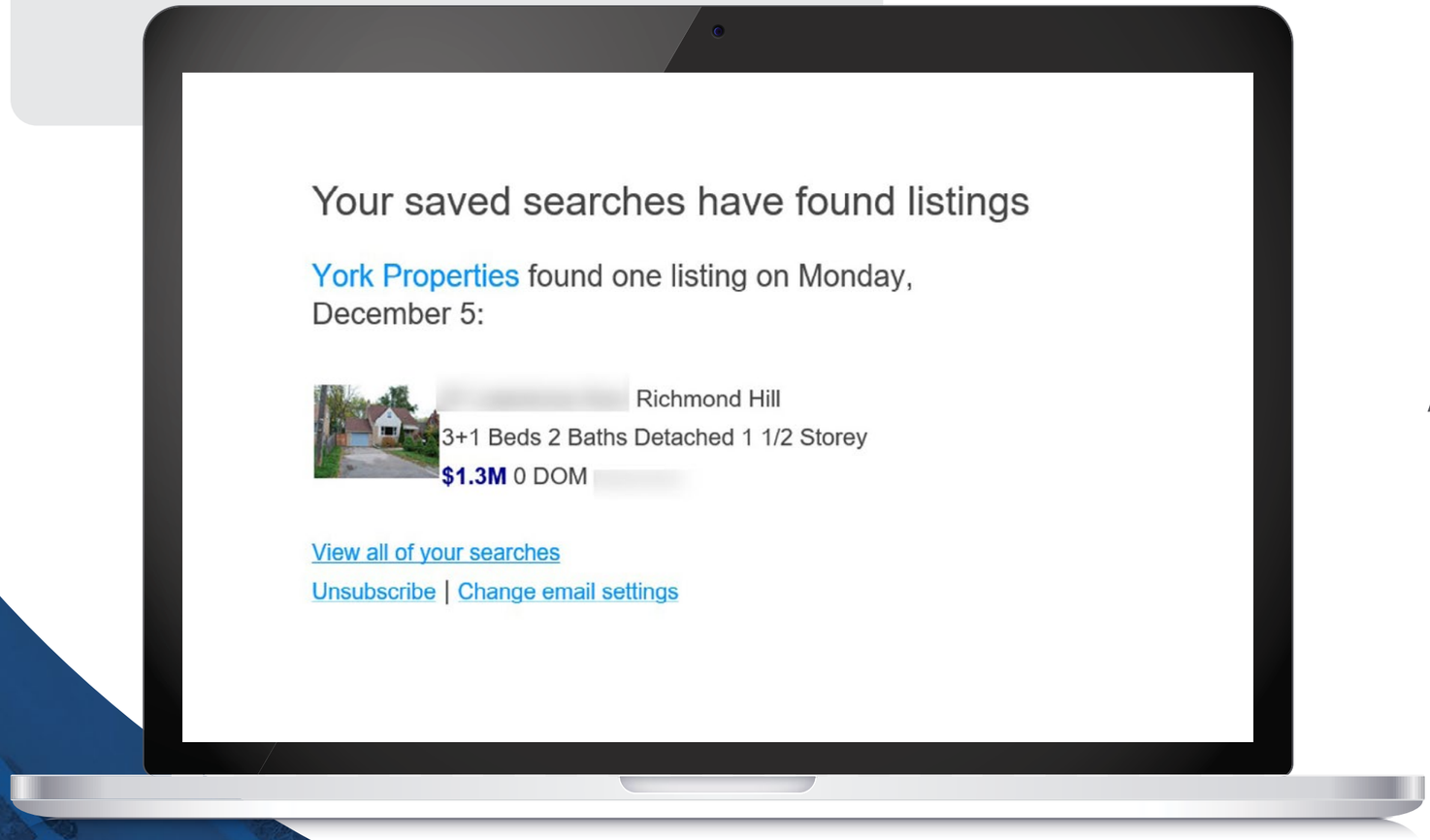
Tips:

- Listings can be viewed from the email and do not require a contact to login to REALM.
- App notifications are for REALM users who use the REALMmlp app on their mobile device and allow notifications from REALM.
- The setting 'Hide' may be used to prevent a contact who uses REALM from making changes to the saved search.

Notification

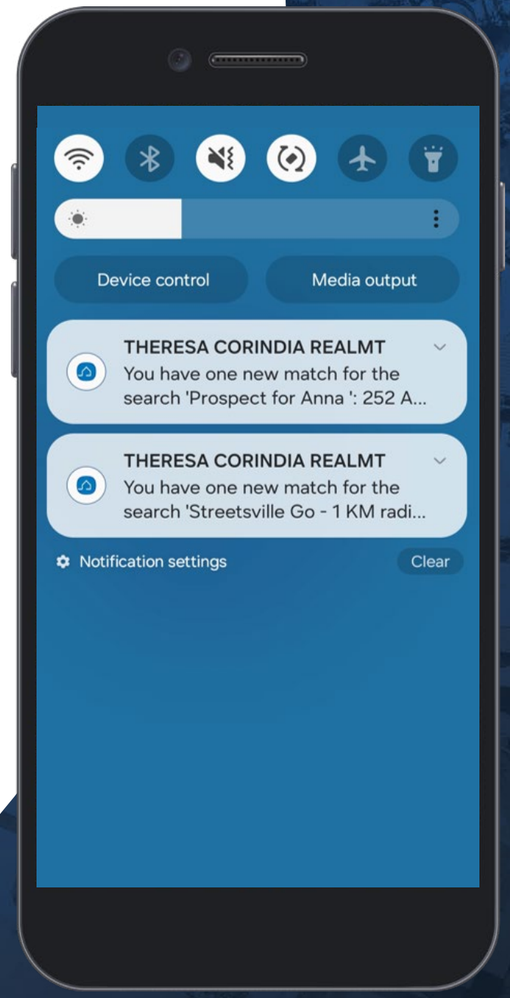
Be informed about important activities in real time!

Email to your desktop and/or mobile





App Notifications (Push) to mobile

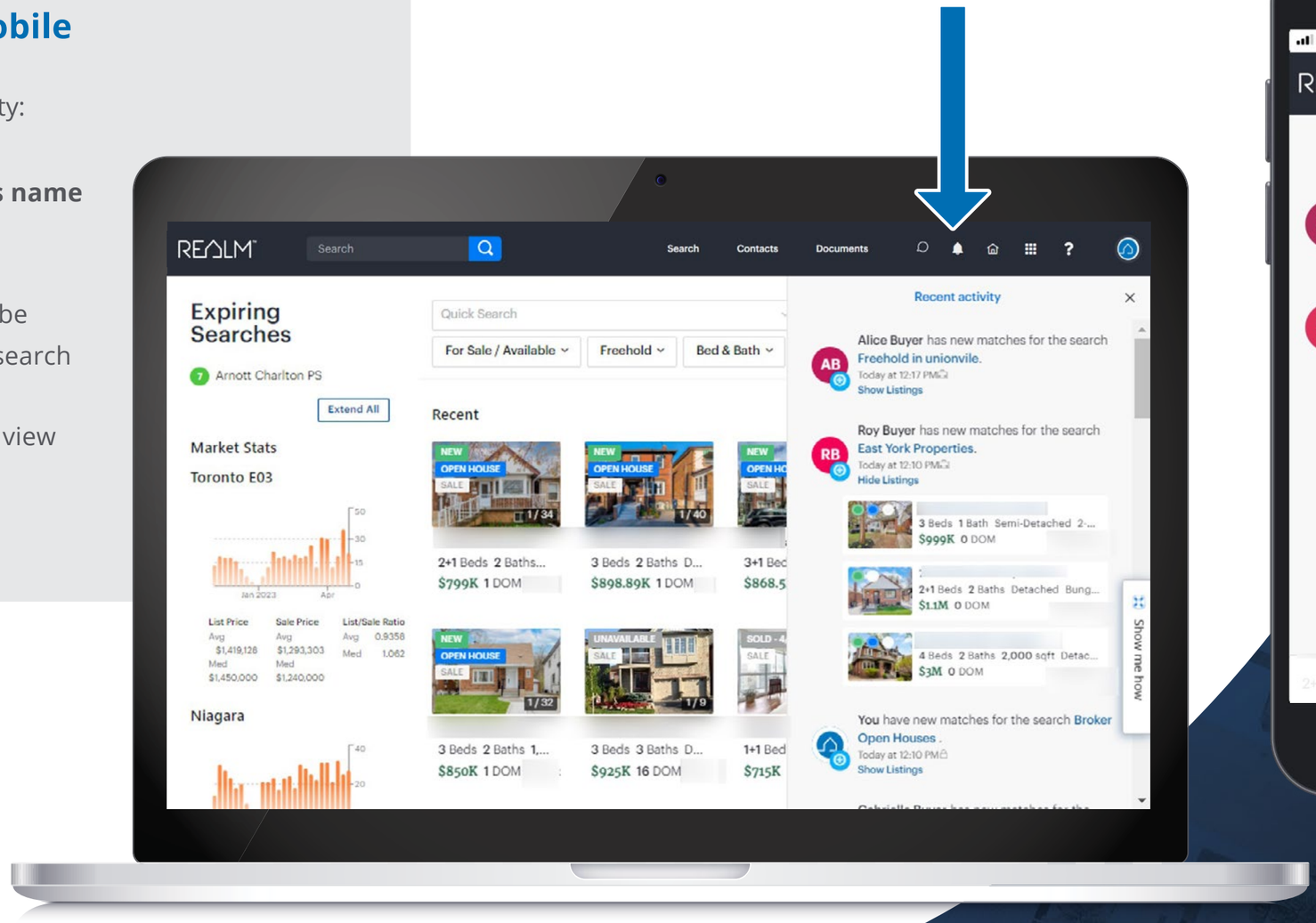


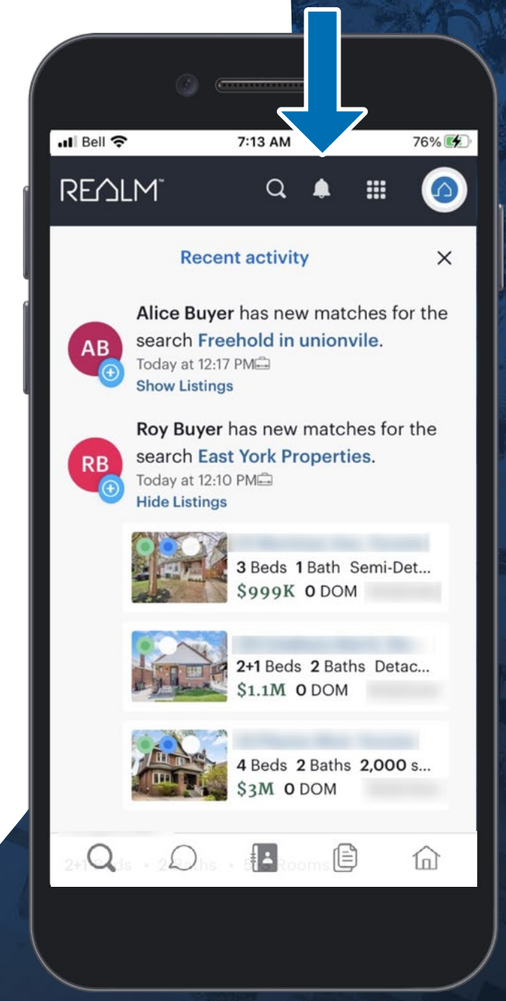
Notification

Using Desktop & Mobile

Select  for recent activity:

- Click on **your contacts name** to go to their record
- Click on the **search** to be directed to this saved search
- Click **Show Listings** to view new information





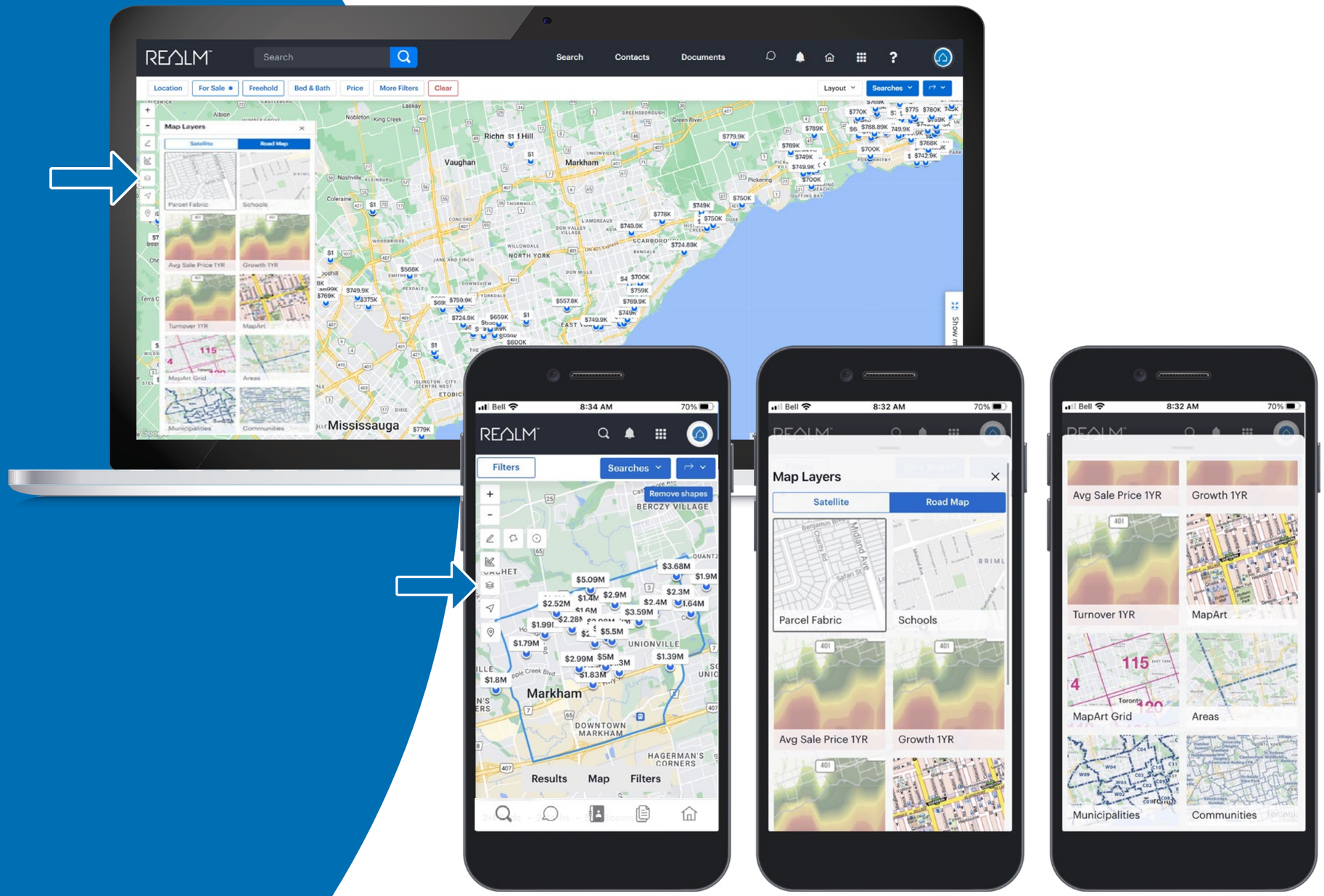
Map Layers provide insight

Quickly view market and listing data at a glance using the various map layers.

Using Desktop and Mobile

From search results in the map window:

1. Select 
2. Choose a layer
3. Review the insight



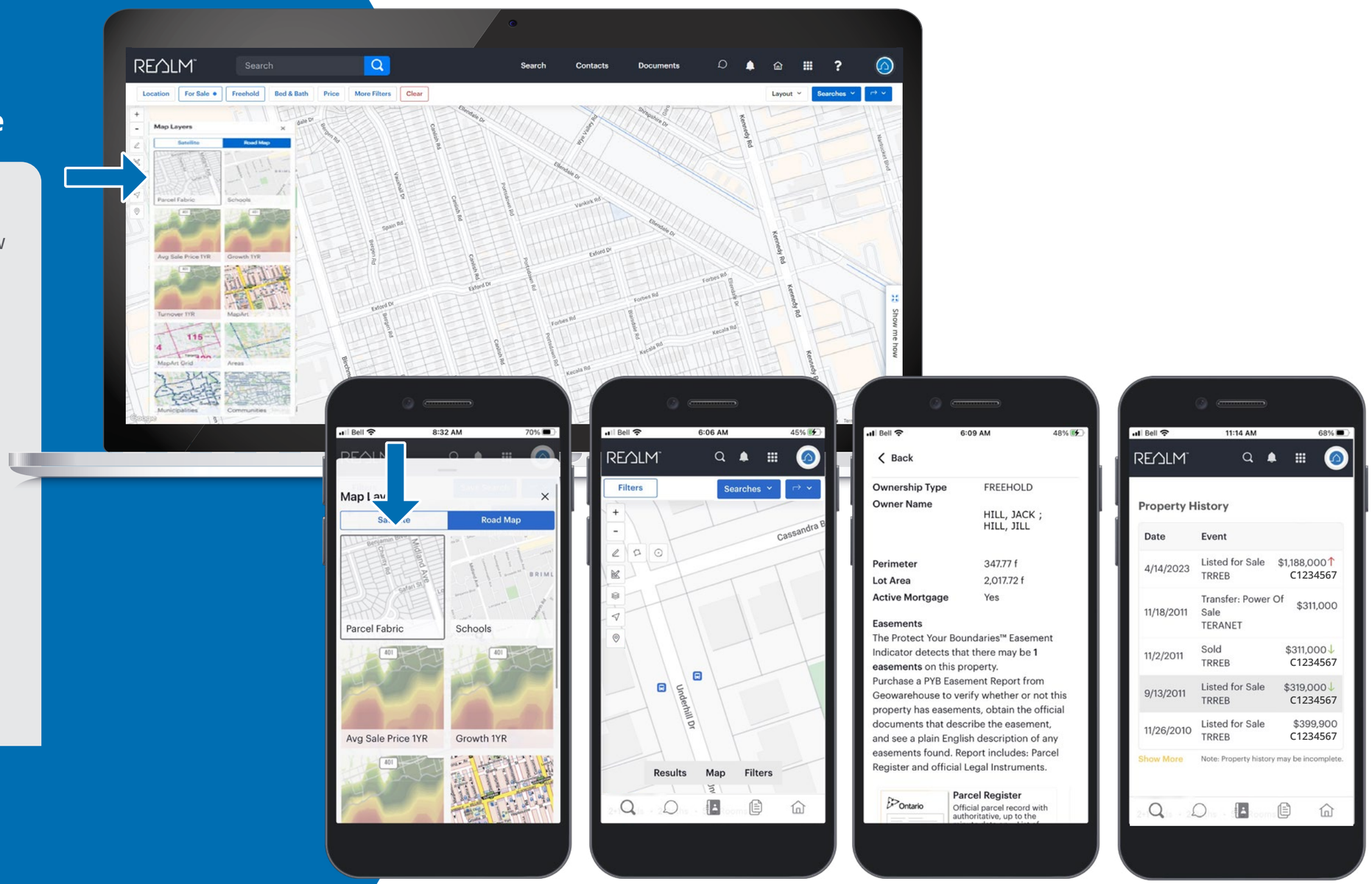
Find Land Registry details using the map

Using Desktop and Mobile

1. Select **Parcel Fabric** to view the ownership parcel

2. Zoom to the property of interest and click on it to view land registry and property history details

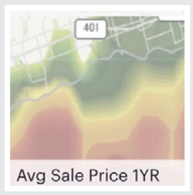




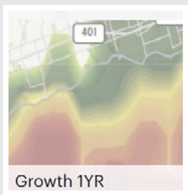
Gain insight from Heat Maps

Using Desktop

1. Select **Avg Sales Price**, **Growth** or **Turnover** to view statistics from residential sold data from land registry



Avg Sale Price 1YR

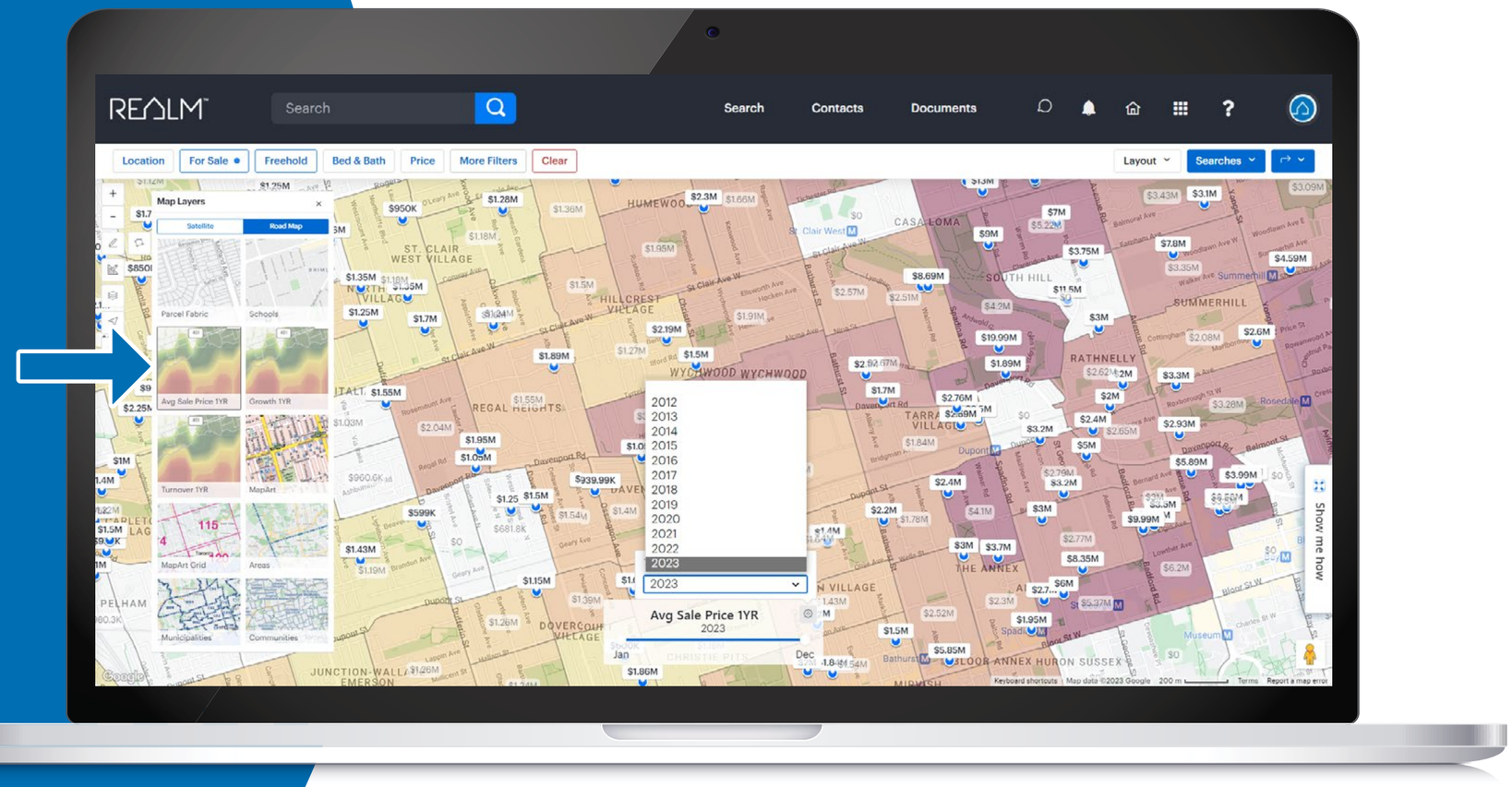


Growth 1YR



Turnover 1YR

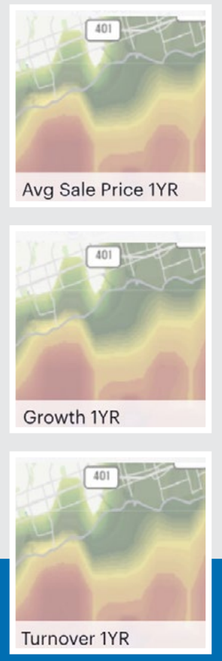
2. Select ⚙ to change the year to view historical data

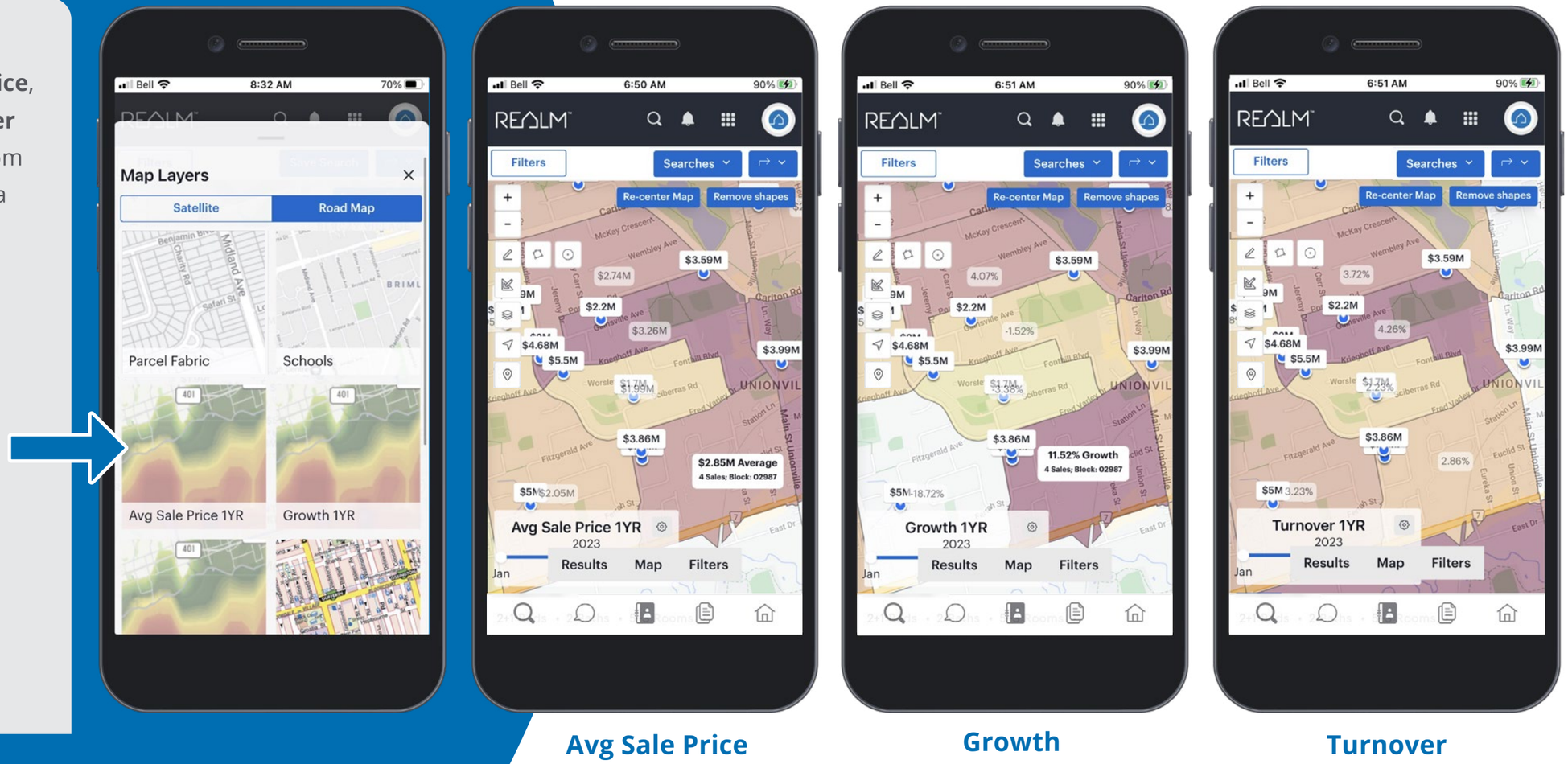


Gain insight from Heat Maps

Using Mobile

1 Select **Avg Sales Price**, **Growth** or **Turnover** to view statistics from residential sold data from land registry





Avg Sale Price | Growth | Turnover

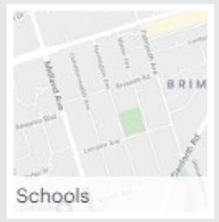
Mapping Areas

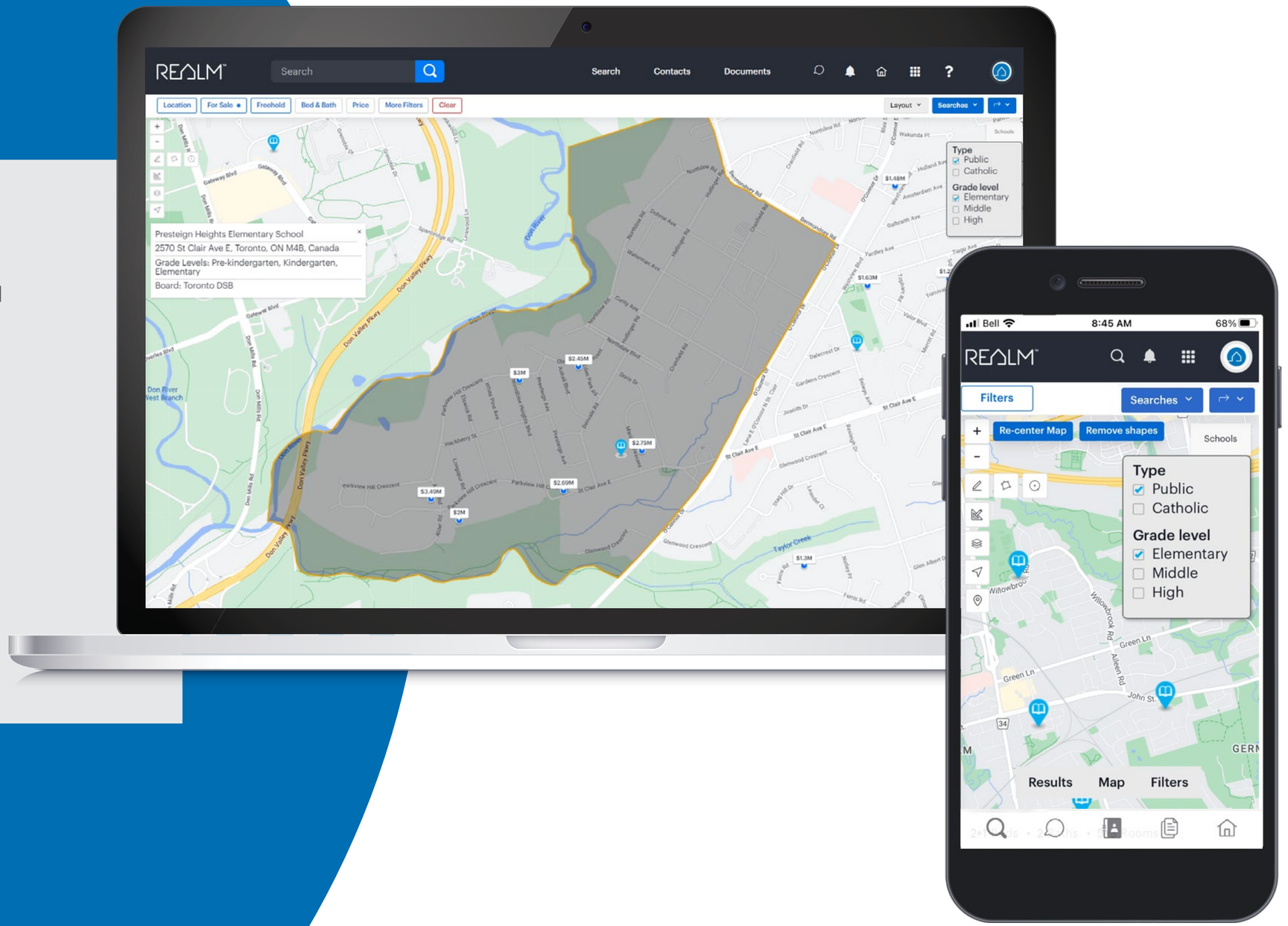
Using Desktop and Mobile

1. Select **Schools** to identify the location & catchment for public and catholic schools by grade level

Public Schools

Catholic Schools





Mapping Areas

Using Desktop and Mobile

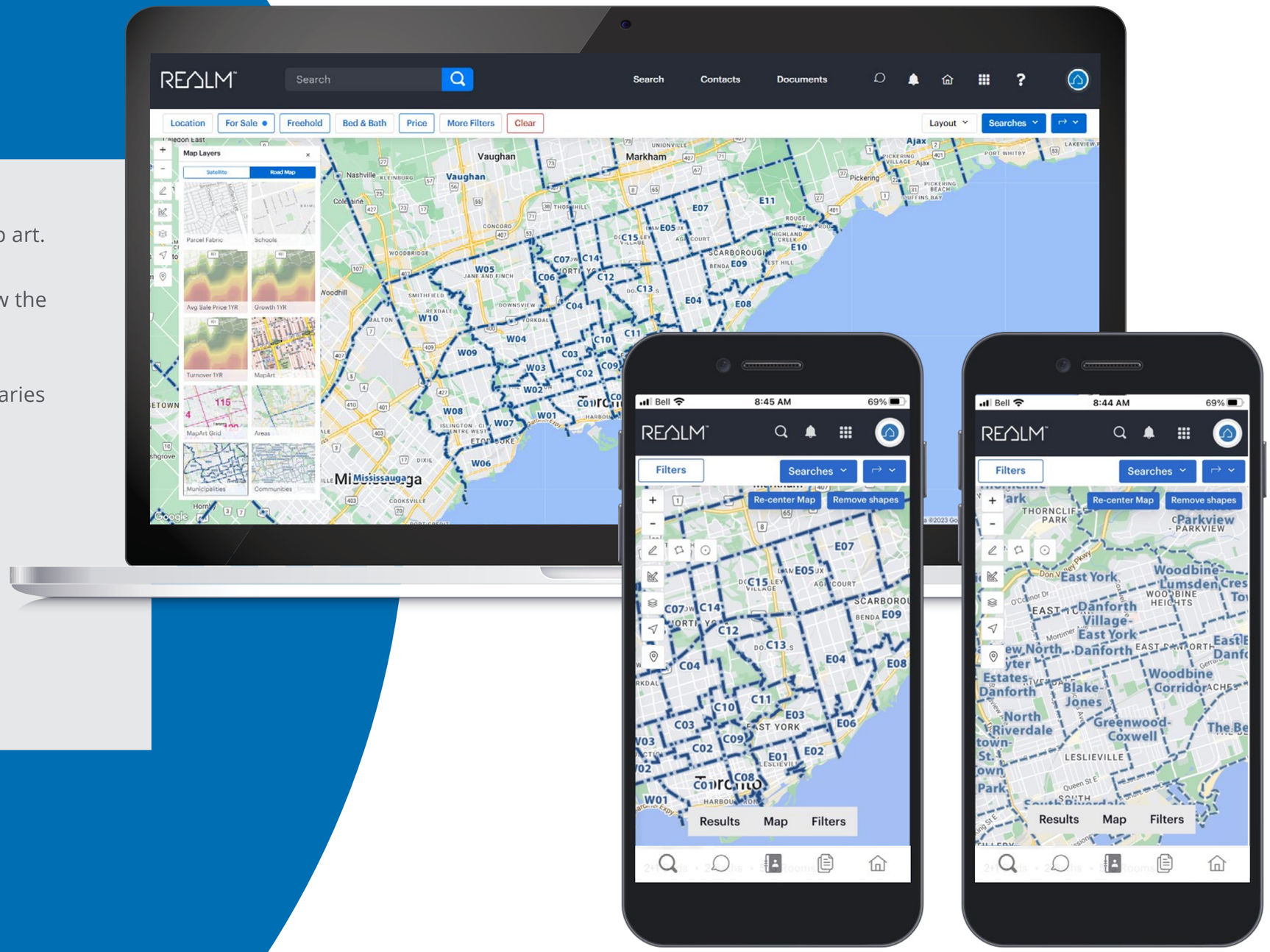
MapArt: A map similar to the style of map art.

MapArt Grid: select this map layer to view the gridlines for the GTA.

Areas: select this layer to view the boundaries for area location on the map window.

Municipalities: select this layer to view the boundaries for TRREB defined areas and municipalities on the map window.

Communities: select this layer to view the boundaries for communities on the map window.



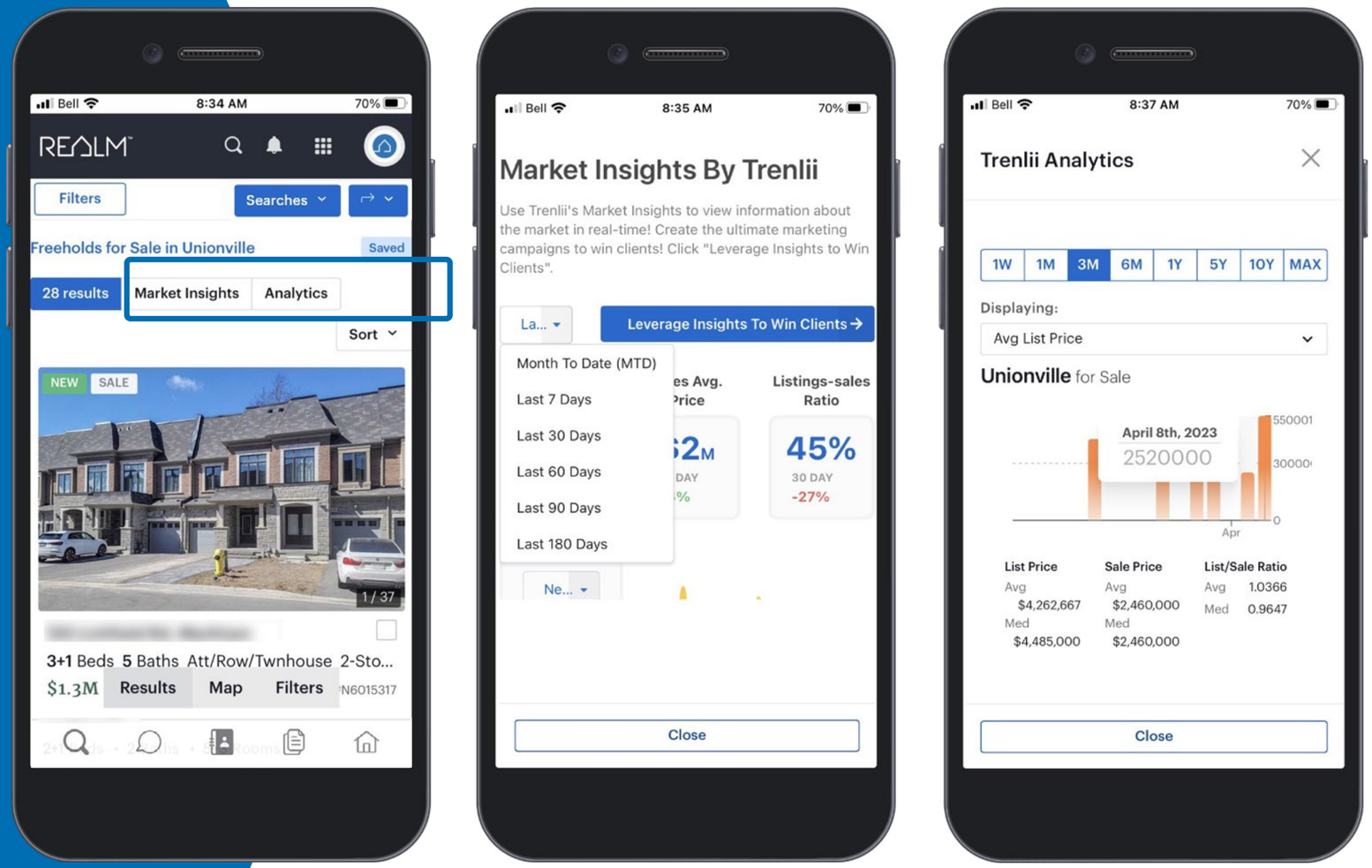
Market Insights & Analytics

Using Desktop & Mobile

From search results:

1. Select **Market Insights** to view Market insights by Trenlii

2. Select **Analytics** to view charts that show stats based on the timeframe and ratio selected



Need Help Getting Started or Support?

We've got you covered!

Desktop

- Select the **? icon** from navigation bar on the right-hand side and visit The REALM Help Centre where you will find a NEW AI powered REALM assistant to help you find video tutorials, help articles, and FAQs.
- Select **Show me how** from the right side of the window to access guided tours.

Mobile

- Select **Help** in your profile avatar and visit The REALM Help Centre.

For quick tips, follow us on Instagram **@realm.mlp** or Facebook at **REALMmlp**.

Contact Customer Service via email at **help@realmmlp.ca** or call **1-888-417-4817.**



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