KELLERWILLIAMS.
REALTY

A Listing Management System Designed for Real Estate Agents

Reference Manual

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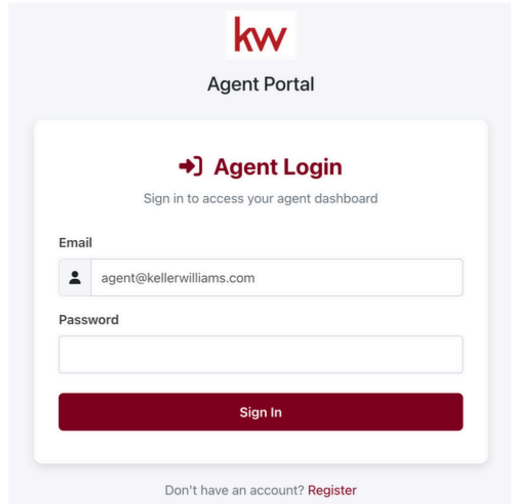
Overview

The goal of this document is to provide a step-by-step instructions for how to utilize the different functions that are provided by the agent portal for Keller Williams Realty.
The agent portal provides different functionalities from organizing listings to scheduling appointments with clients. It was designed to be user friendly and easy to understand and implement.

This document is designed in a walk-through style where it guides users from the registration of a new agent all the way to signing out of the system.
Some of the major views described in this document include the Appointments page, the Listing page, and the Clients page.

New Agent Registration Page

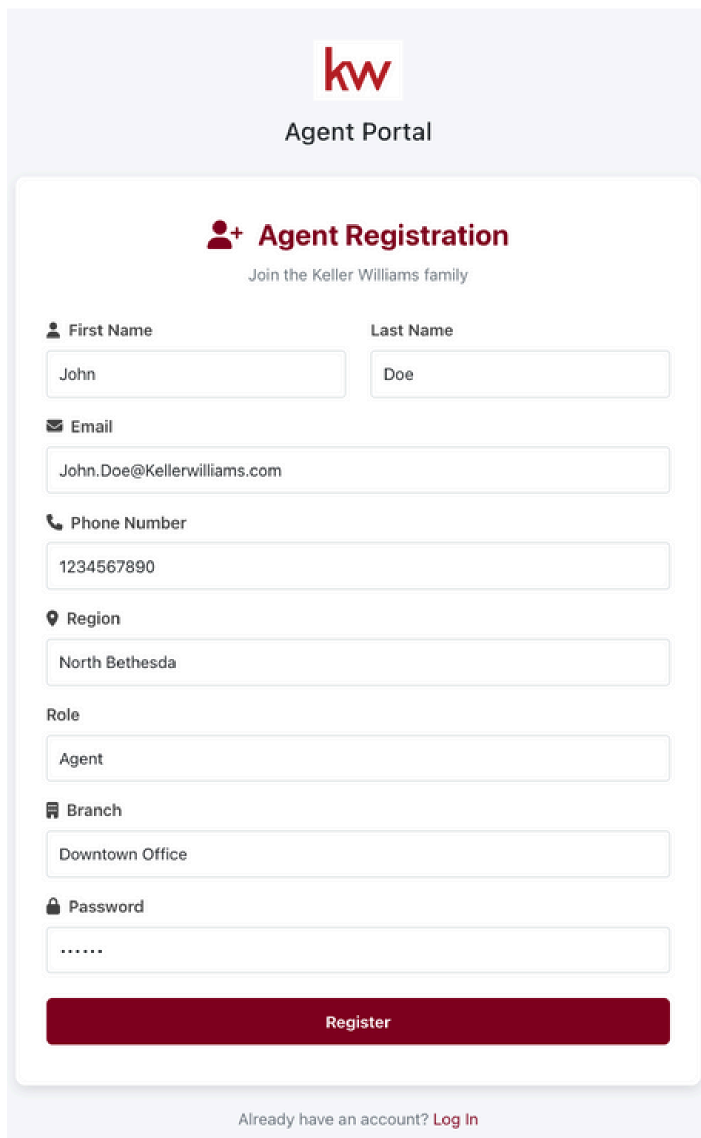
Once an agent opens the link to the agent sign in page, they'll first see the login page. From there a returning agent can choose to sign in by inputting their Email and Password.



If a new agent wishes to register, they simply select the register link at the bottom and it will take them to the registration page.

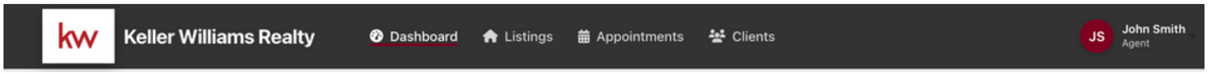
The new agent then enters the following:

- First Name
- Last Name
- Email Address
- Phone No.
- Region they're currently located at
- Their role in the firm
- Branch they're assigned to
- Desired Password.

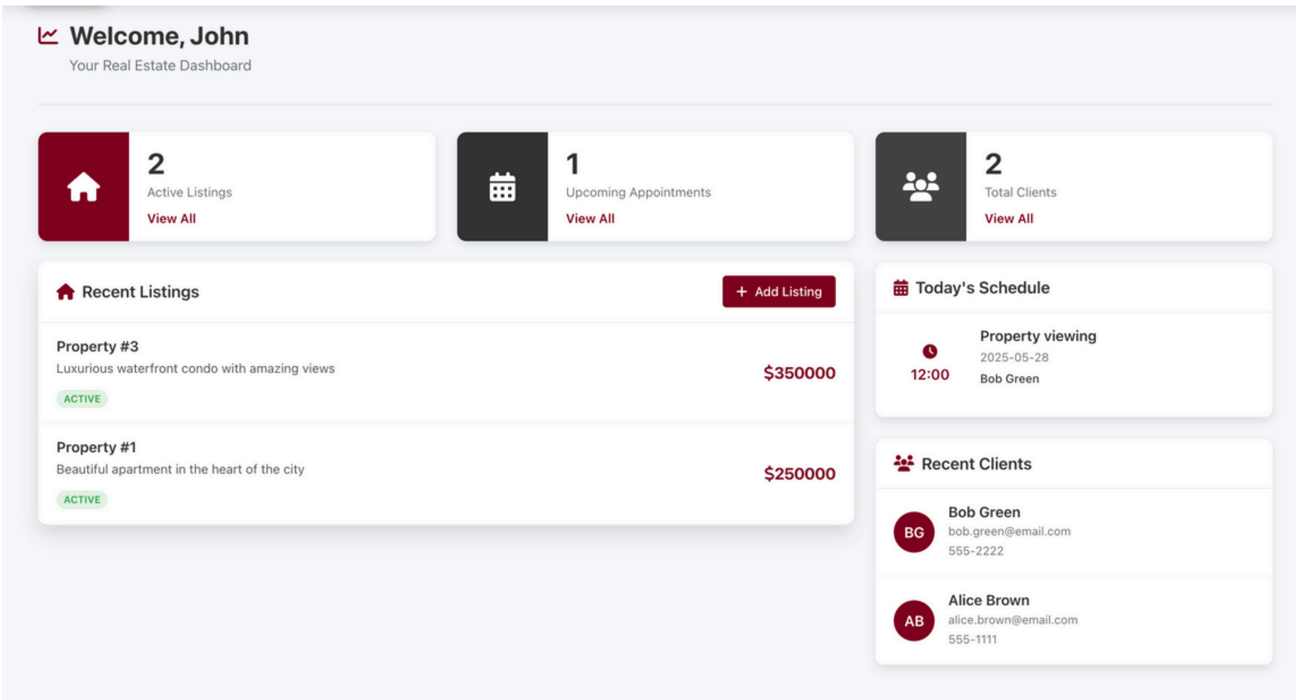


Once they enter all the required information, they can click "Register' and they should automatically be directed to view their dashboard.

DashboardView



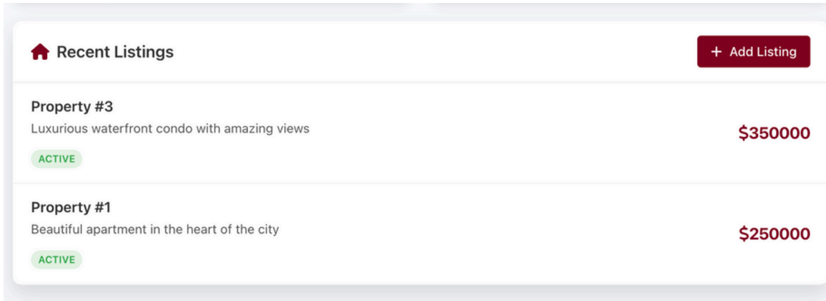
Appointments: This tab will direct the agent to view all scheduled appointments
Clients: This tab will direct the agent to view all clients that have been added to the system
Listings: This tab directs the agent to view all listing added to the system
The keller William Realty logo: serves as a shortcut to return to the homepage



Statistics

The Home Icon: Serves as a snapshot of the number of listing that are in the system and also serves as a shortcut to the Listings page.
The Calendar Icon: Serves as a snapshot of the number of appointments scheduled in the system and also serves as a shortcut to the Appointments page.
The Group of people Icon: Serves as a snapshot for the number of clients added into the system and also serves as a shortcut to the clients page.

Recent Listings



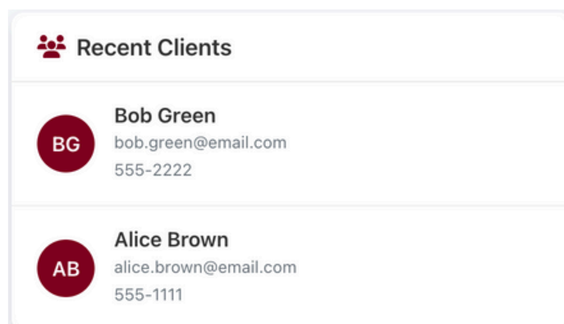
The “Recent Listings” tab serves as a quicklook into the listing portal. Some of the key functions in there include:

Property: This displays the Property ID which is a primary key of the property table.
Description: This part displays the description of the property
Status: The “Active” tab shows the status of the property
Price: Displays the price of the property

this tab will allow the user to Add a new listing directly from the dashboard.

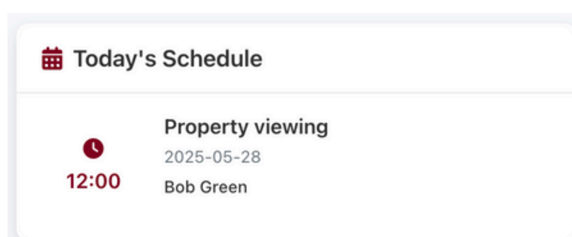
Recent Clients

The “Recent Listings” tab serves as a quicklook into clients that have been recently added to the system.
Name: Displays the client’s name
Email: Displays the client’s email address
Phone No: Displays the client’s phone number
Icon: Displays the first and last name initials of the client



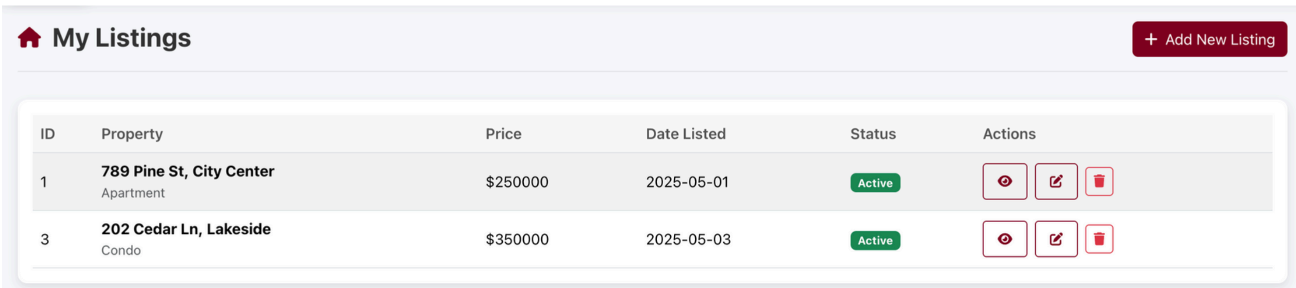
Upcoming Appointments

Today’s schedule tab shows any upcoming appointment the agent has.
Purpose of Appointment: Displays the agent’s reason for scheduling an appointment
Date: Displays the appointment date
Time: Displays the appointment time
Client name: Displays the first and last name of the client whom the appointment is made for



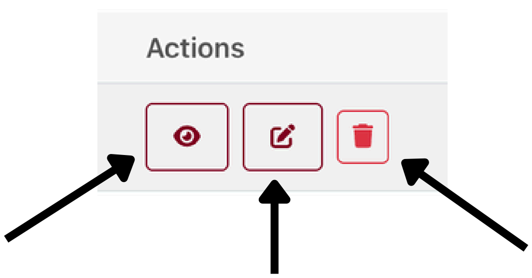
Listing Page

The “Listings” page directs the agent to view all the listings saved in the system. From here the agent can also add a new listing.



ID	Property	Price	Date Listed	Status	Actions
1	789 Pine St, City Center Apartment	$250000	2025-05-01	Active	
3	202 Cedar Ln, Lakeside Condo	$350000	2025-05-03	Active	

ID: The ID column displays the auto generated property ID for each listing.
Property: This column displays the address of the property along with the type of property.
Price: This column displays the current market price of the property.
Date Listed: This column displays the date when the agent added this listing into the system.
Status: This column displays the current status of the listing and changes color depending on the status (Active, pending, sold)
Actions: This column allows the agent to make changes to the listing.



Allows the agent to view the listing details

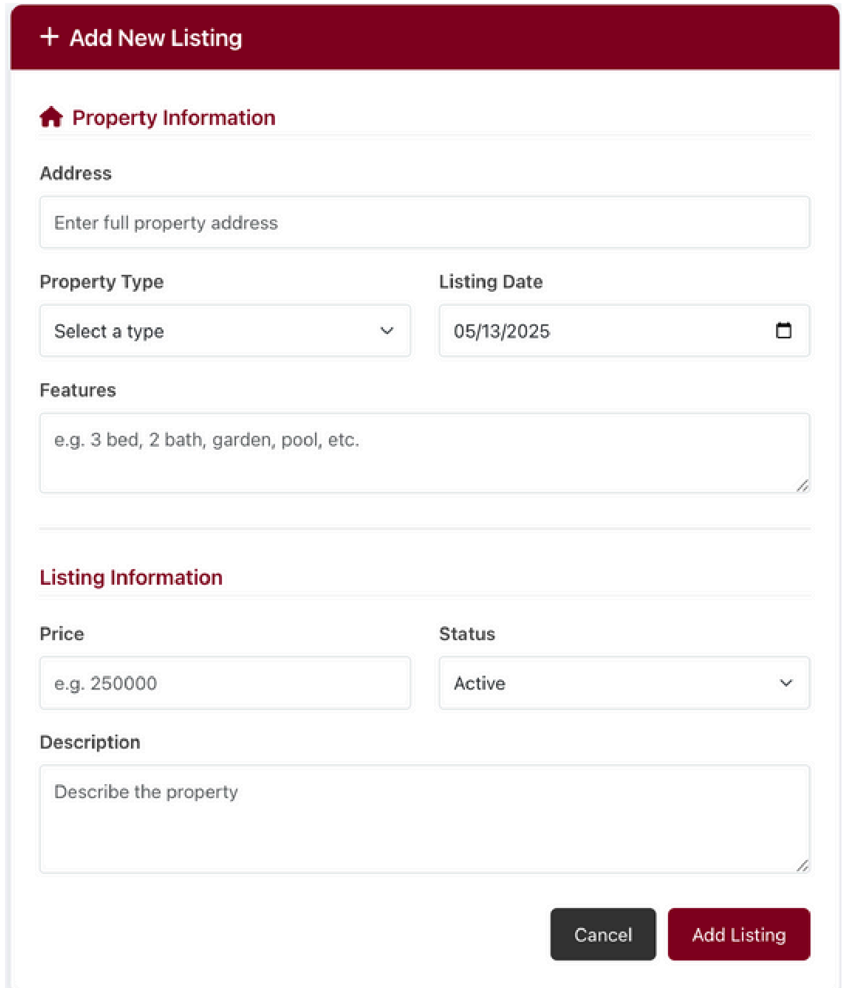
Allows the agent to edit the listing

Allows the agent to delete a listing.

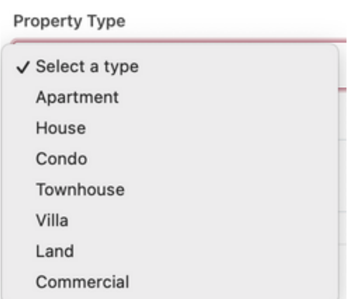
This Tab allows the agent to add a brand new listing into the system.

The next page further explains the add listing page in detail.

Address Tab: This feature allows the agent to enter the address of the new property being listed.



Property Type: This feature allows the agent to choose the type of property being listed. For example, the agent can classify the listing as an Apartment, Villa, or any other supported property type.

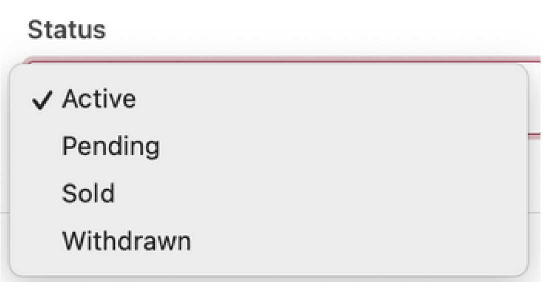


Listing Date: This feature allows the agent to set what date the new property was listed.

Features: This feature allows the agent to list any special features that would be included with the new listing.
eg: 3 bed, 2 bath condo....

Price: This feature allows the agent to place a price on the new listing.

Status: This feature allows the agent to give the new listing a status. The status could be active, sold, pending or withdrawn

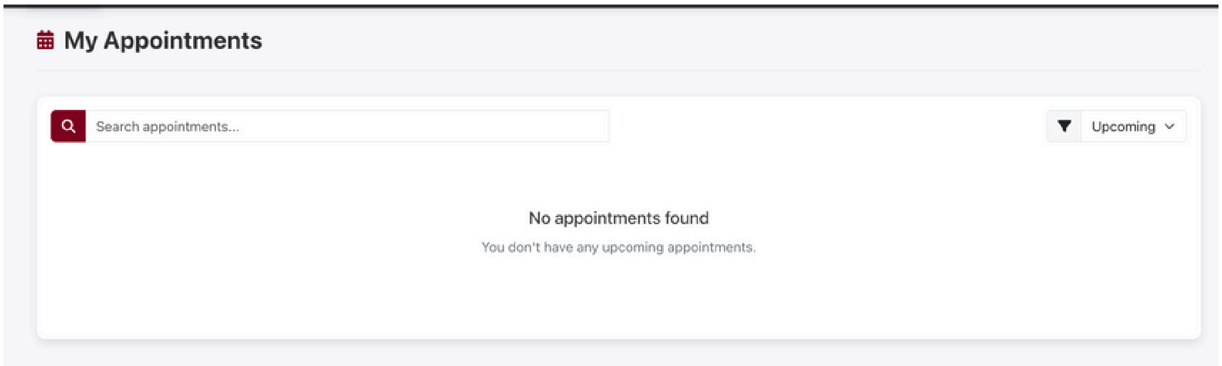


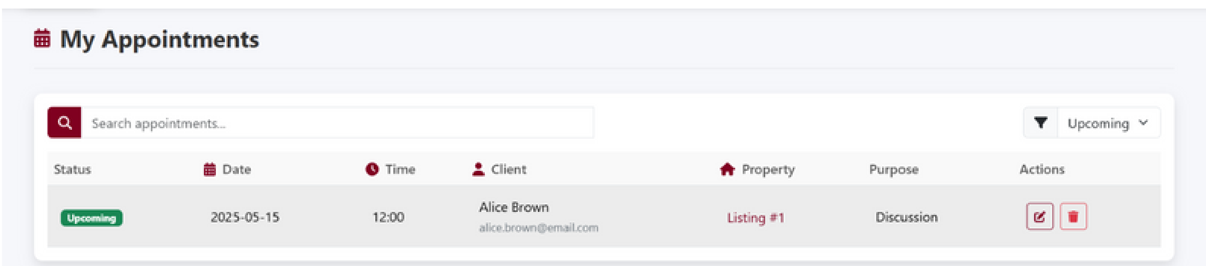
Description : This feature allows the agent to give a description to the listing.

Appointments Page

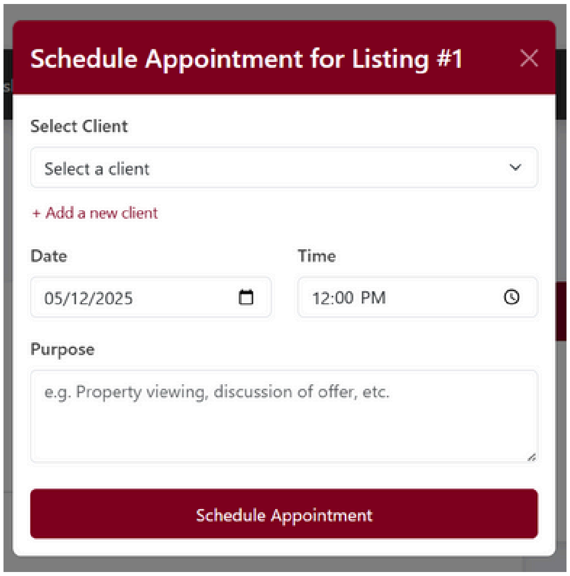
The “Appointments” page directs the agent to view all the appointments that have been scheduled with a client.

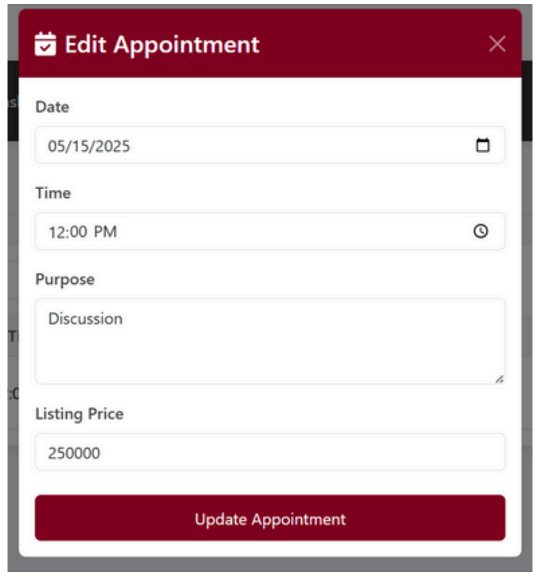
If no appointments are scheduled, the system will display the following message.





Status: The column displays the status of the appointment, i.e, if it has already occurred or it’s upcoming.
Date: This column displays date of the appointment.
Time: This column displays the time of the appointment.
Client: This column displays the client whom the appointment is scheduled for.
Property: This column displays Listing ID the client is interested in.
Purpose: This column displays the reason for scheduling an appointment with the client.
Search appointments: Allows the agent to search scheduled appointments by inputing the client name.
Actions: Allows the user to make changes to the appointments (edit or delete).

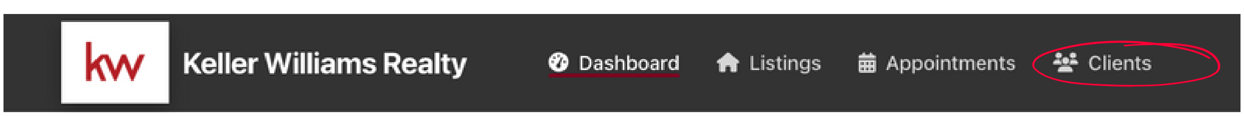




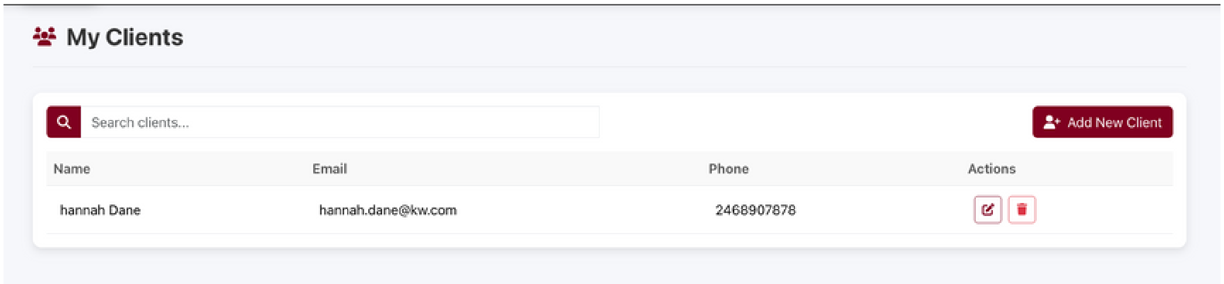
Select a client: This tab allows the agent to select an existing client in the system whom the appointment is for.
Add a new client: This link allows the agent to add a new client into the system first then schedule an appointment for them.
Date: This tab displays the date of the appointment.
Time: This tab displays the time of the appointment.
Purpose: This box allows the agent to add the purpose for the appointment to be scheduled.

If an agent wishes to edit an appointment, they can simply select the  button and make changes to the date, time, and purpose of appointment.

Clients Page



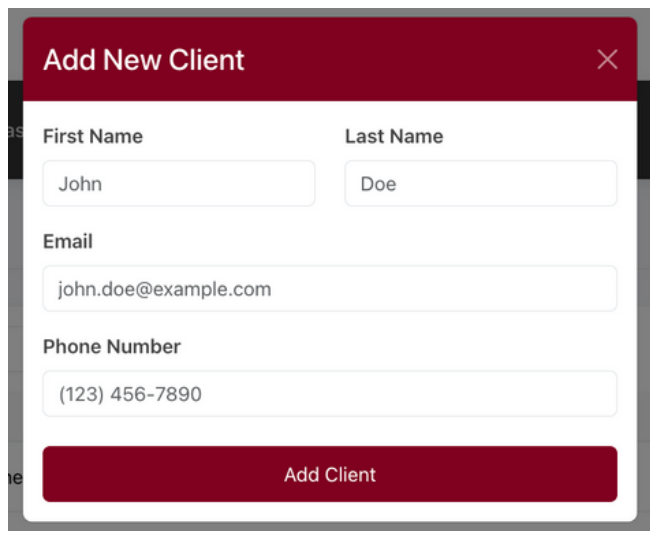
This page allows the agent to view their client information.



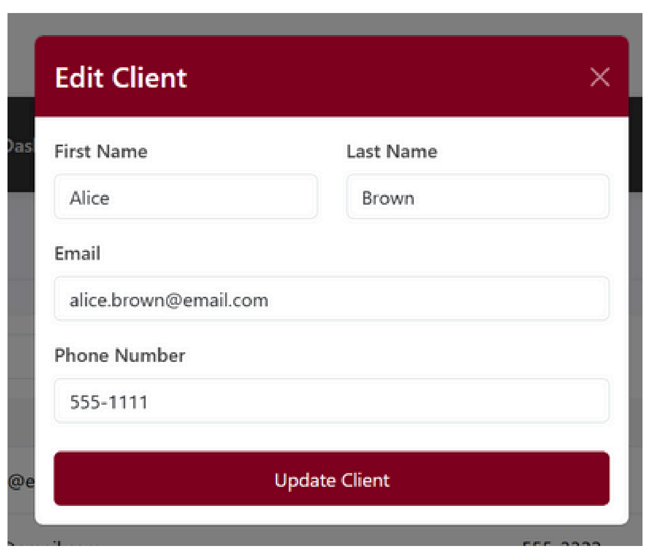
Name: The column displays the first and last name of the client.
Email: This column displays email address of the client
Phone: This column displays phone number of the client.
Actions: Allows the user to make changes to the client information (edit or delete).

This tab allows the agent to add a new client into the system.

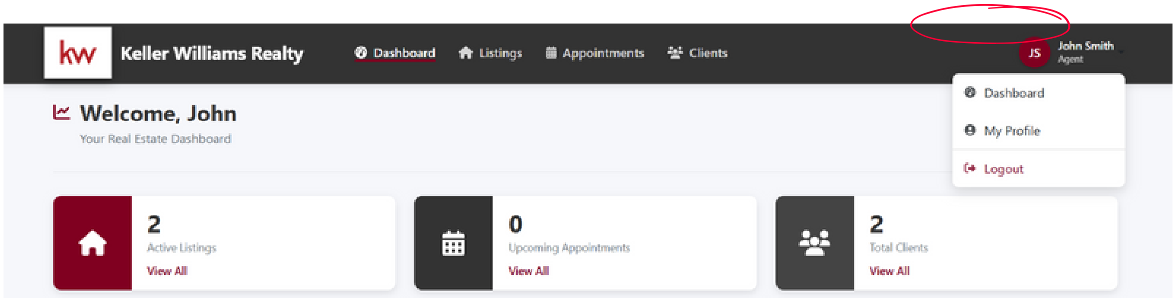
Once the Agent clicks on the "Add New Client" tab, they can easily add a new client by inputing the client's First Name, Last name, Email address, and Phone Number.



An agent can also edit a client's information by clicking the  button and making changes to the desired inputs.



Logout Page



To logout from the page, the agent can simply click on his/ her name on the top right corner and it'll give them an option to view the dashboard, view their profile or logout. From there, they can click on the "Logout" button and should be able to Sign out of the portal.