KELLER WILLIAMS REALTY

A Listing Management System Designed for Real Estate Agents

Tutorial Manual

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1. INTRODUCTION

1.1 Who Should Use this Application

Keeping organized data about housing properties is extremely important to ensure smooth, efficient and accurate transactions. Disorganized applications can lead to many errors, delays and miscommunication with clients –ultimately resulting in a loss of sales and client trust.
This simple application helps agents meet the expectations of the clients who are seeking to purchase a new property. On top of that, agents can access critical information at a moment's notice.
This application is intended for use by both real estate agents and real estate managers that manage and track property listings, client relations and agent information. Implementation of this system can help to drive sales and customer satisfaction—as well as agent productivity and performance.

1.1 Who Should Use this Manual

This guide is intended for new users of the Keller Williams Real Estate Management System, providing instructions for navigating the application successfully:

- Company Agents: Agents can learn how to log in to their accounts and manage their clients and listings of properties. They can also schedule appointments with clients who wish to view certain properties.

2. KEY FEATURES

2.1 Features for Agent Users

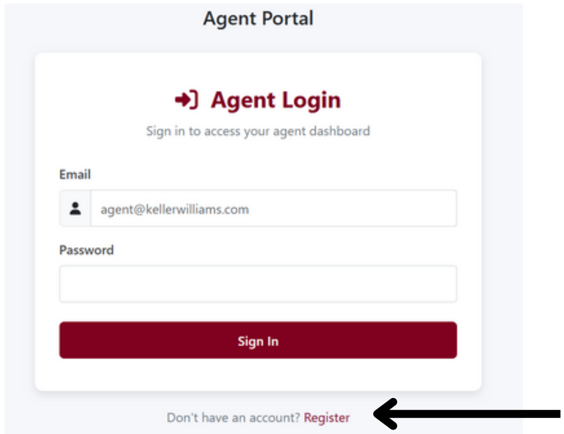
Agent Users can do the following functions within Keller Williams Real Estate Management System:

- Log in/ log out of the system
- Register as an agent to the system
- Add appointments with clients
- Update appointments with clients
- Add clients to the system
- Update clients within the system
- Add listings to the system
- Update listings within the system

3. AGENT USERS: A GUIDED TOUR

3.1 Agent Registration

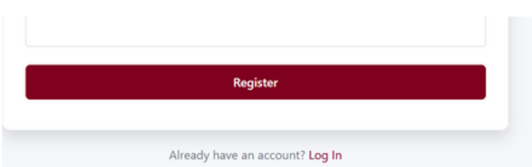
If a user is not already in the system or a new user is joining the team, then they must register an account before signing in. There is a Register tab below the sign in feature for these users.

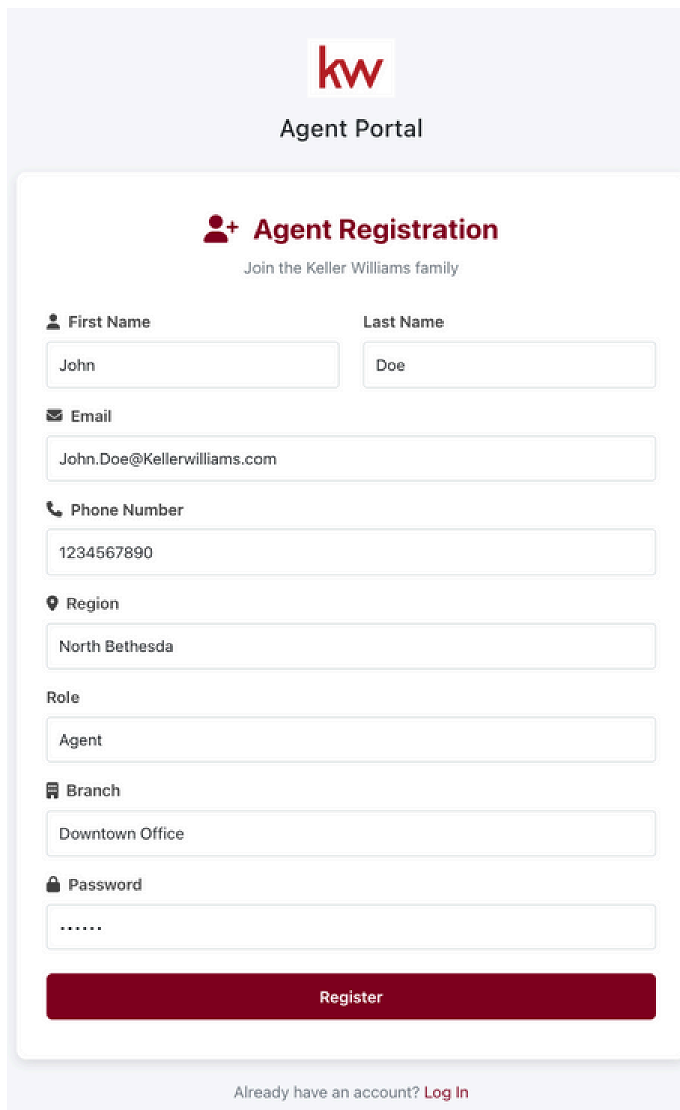


Once the user selects the Register tab, they will be taken to a new screen asking for information about the user. The Register tab asks the user for their first and last name, email, phone number, region, role within the company, branch and password.

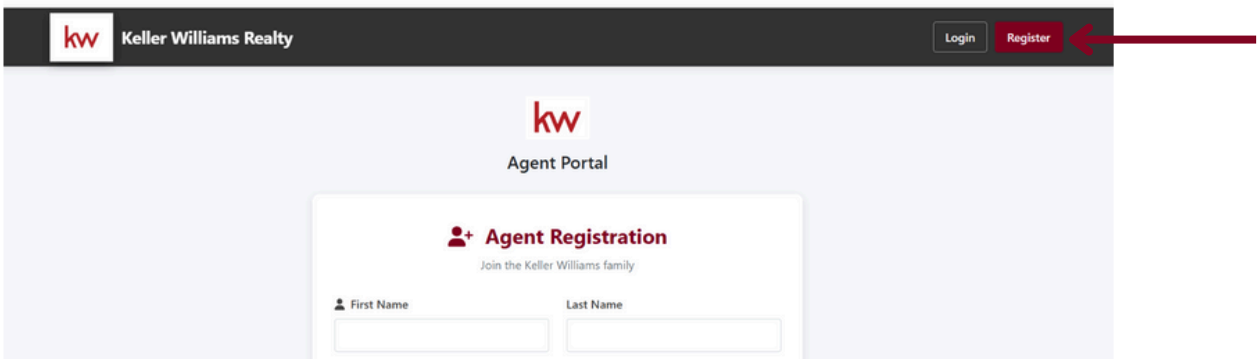
Fields are not allowed to be blank during the registration process. If they are left blank, then the system will prompt the user to fill out the required field that is missing.

If by chance, an existing user accidentally navigated to the register tab, but wishes to go back to the log in screen then they are able to do so. At the bottom of the register tab, there is a "Log in" field that the user can select to go back to the log in page.



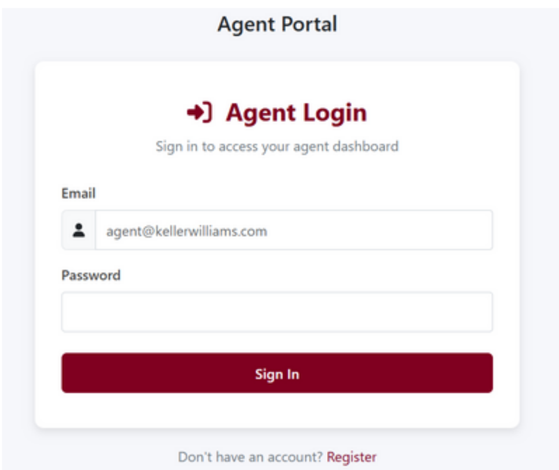


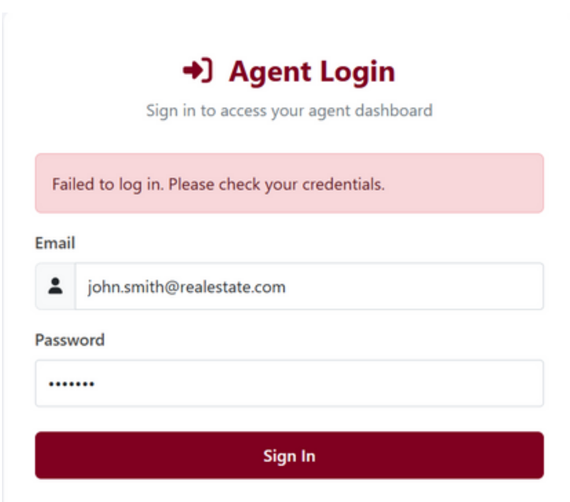
Additionally, if the user scrolls up to the top right of the register page, the user can choose to go to the log in and register page as well. There are multiple locations that allow the user to navigate the application before signing in.



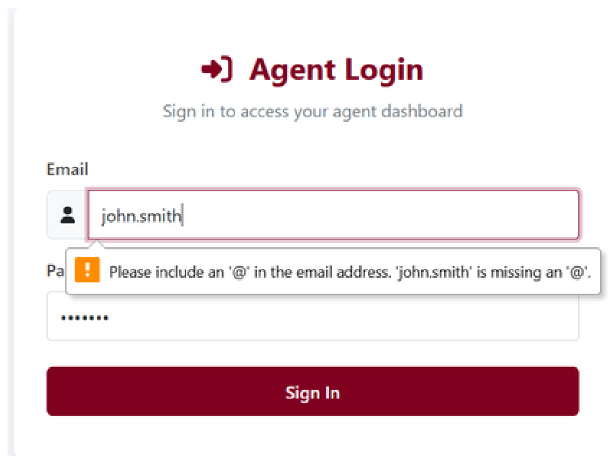
3.2 Sign in

Upon launching the application, users will see a login window with input fields for username and password.





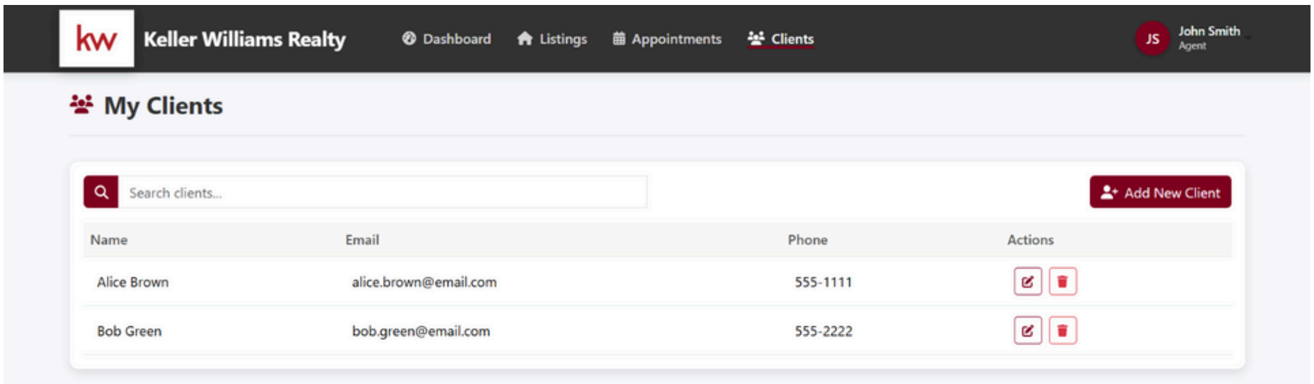
If an invalid email is entered, the system notifies the user that the email address must contain an "@" symbol. The user can try to sign in again.



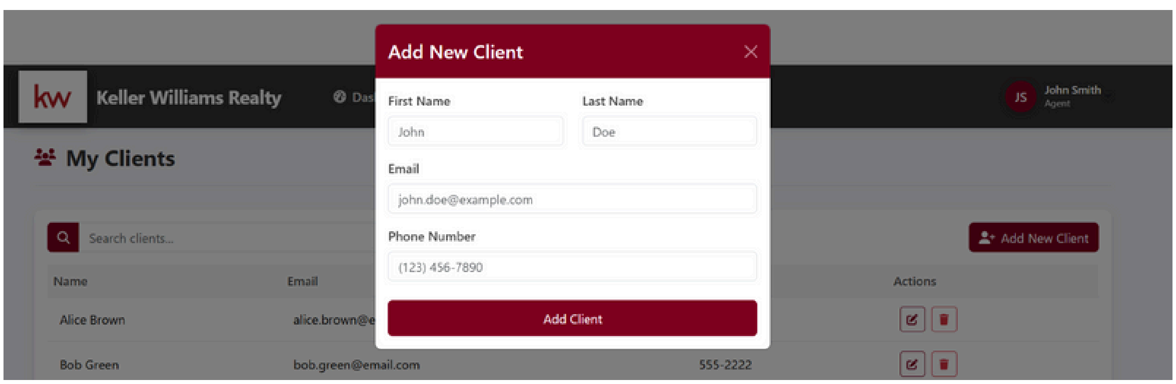
If the credentials are invalid, then the system prompts the user to log in and to check their credentials. This message is different than the previous error so that the user knows what went wrong without having to guess.

3.3 Managing Clients

The Clients tab allows users to view, create, update, and delete client records within the system. It serves as the primary hub for managing client information, enabling users to track existing clients, update their contact details, and associate them with agents. This section also supports the setup of future appointments by linking clients to properties and agents as needed.
To manage clients, users must first navigate to the Clients tab at the top of the dashboard. Upon selection, a list of all registered clients will be displayed. Each client's entry includes the client's first and last name, email address and phone number.

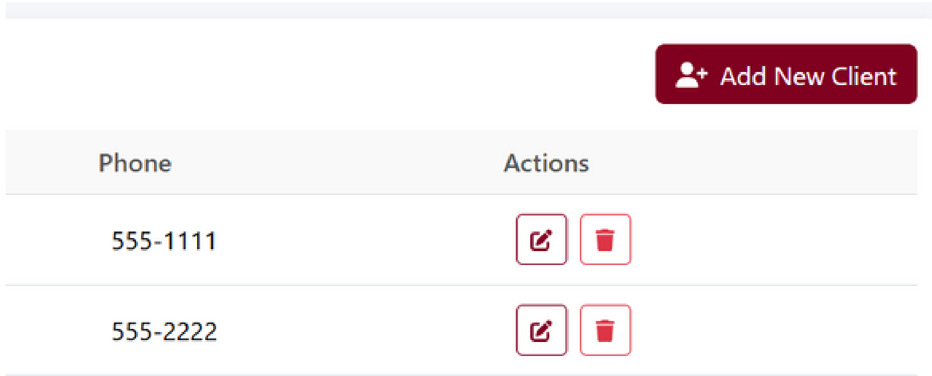


Users can create a new client by selecting the Add New Client tab in the top right of the screen. This allows entry of relevant details, including the client’s name, email address and their phone number.



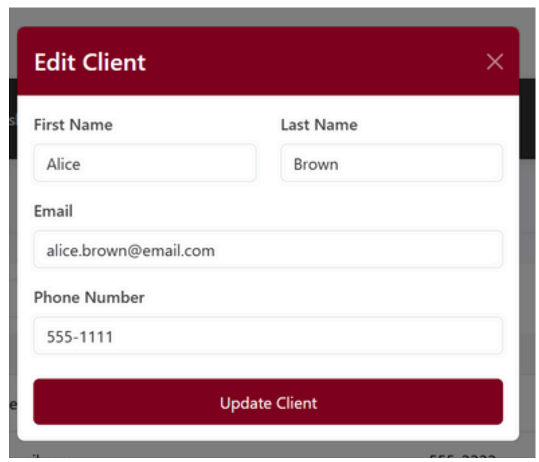
The user can also click the “x” in the top right of the add new client tab to exit without confirming changes to the new client. This allows flexibility and ease if users may have accidentally tried to add a new client or they have changed their mind before finishing.

Existing client records can be modified by navigating to the actions tab to the right of the client information and selecting the Edit button next to the desired client.



To delete a client, the user must first navigate to the actions tab to the right of the client's information. Once there, the user can select the delete button that looks like a trash bin to delete the client from the system. The application will ask for confirmation before completing the request to make sure this is intentional.

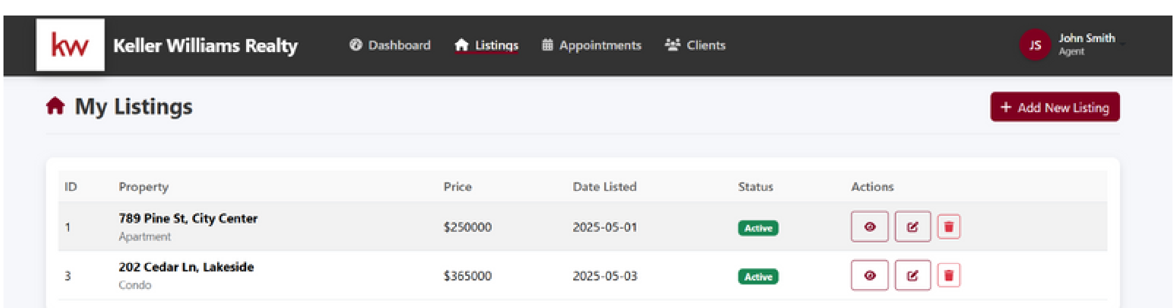
Once the edit client tab is selected, a window will appear with all of the client's information. The user may then update any necessary information about the client. Once again, the user is able to hit the exit button in the top right of this window to exit without saving any changes made. To confirm changes about the clients, simply select the update client button at the bottom of the tab once completed.



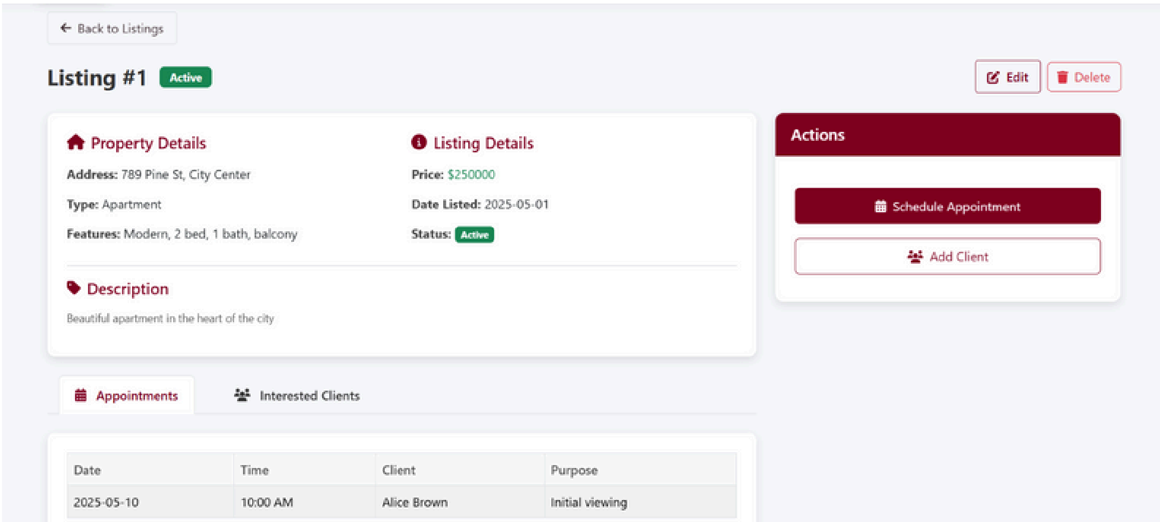
3.4 Managing Listing

The Listing tab allows users to view, create, update, and delete property records within the system. It serves as the primary hub for managing property listings, enabling users to track available properties, update listing details, and associate them with clients. This section also supports scheduling future appointments by linking clients to specific properties and agents as needed.

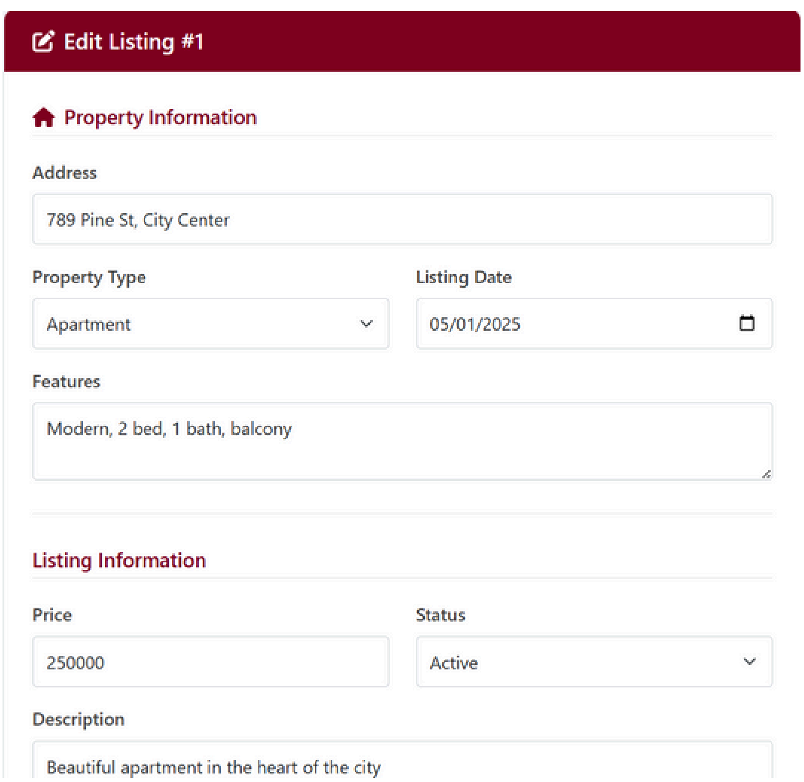
To manage Listings, users must first navigate to the Listings tab at the top of the dashboard. Upon selection, a list of all registered properties will be displayed. Each listing entry includes property id, location, price, date listed and status of the properties.



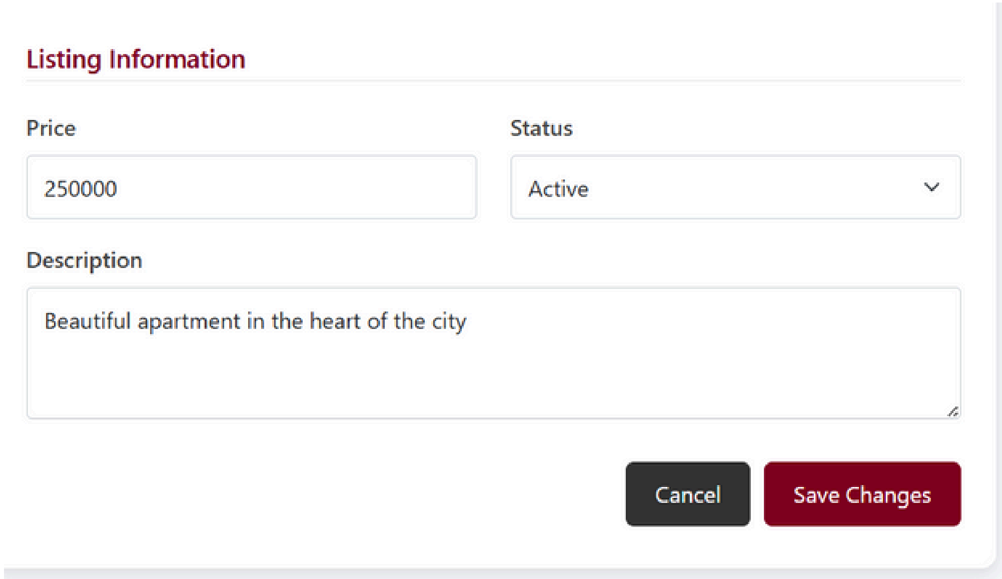
Users can view the property by clicking the eye button under the actions tab. Once selected, a more detailed view of the property will show up. In this tab, the user is able to see the property details, listing details, a description of the property, any future appointments with clients and any clients interested in the property.



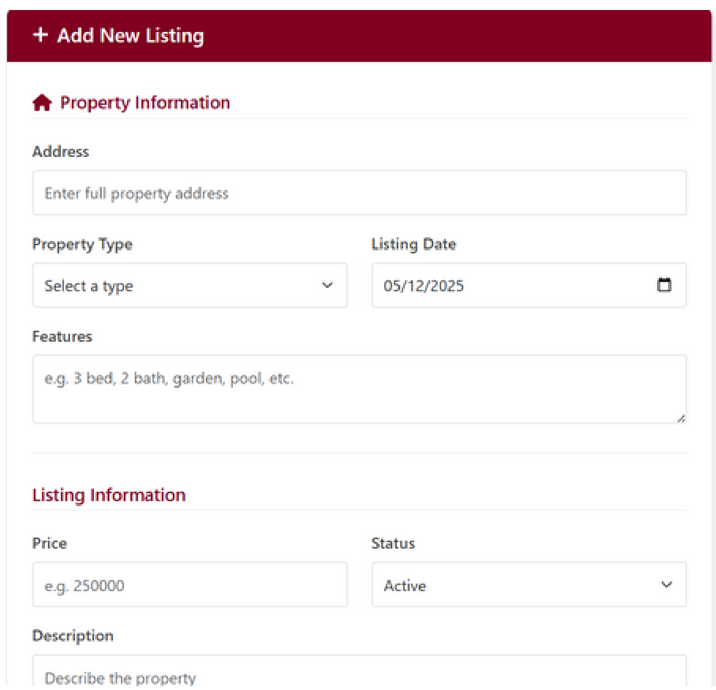
From this tab, users are also able to edit the current listing that they are viewing. To do so, click the edit tab in the top right corner of the screen. A new tab will open; allowing the user to make any necessary changes to the listing.

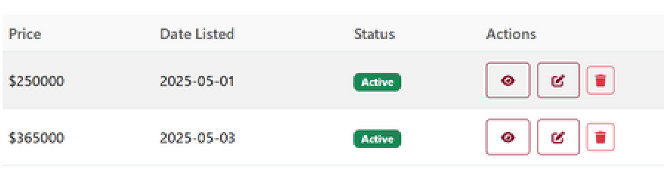


Once the user is finished editing the listing, there is a save changes button on the bottom right of the page that will finalize the changes made.



Users can create a new listing by navigating back to the original Listings tab from the dashboard. Next, select the Add New Listing tab in the top right of the screen. This allows the user to add property information and listing information to the new listing. At the bottom of this tab, the user can save or discard the listing.





Price	Date Listed	Status	Actions
$250000	2025-05-01	Active	
$365000	2025-05-03	Active	

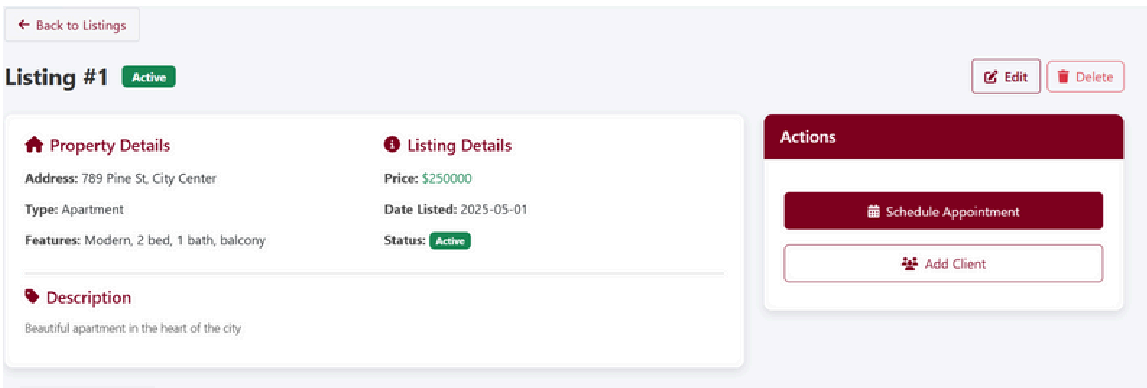
To delete a listing, the user must first navigate to the actions tab to the right of the listing page. Once there, the user can select the delete button that looks like a trashcan to delete the listing from the system. The application will ask for confirmation before completing the request to make sure this is intentional.

3.5 Manage Appointments

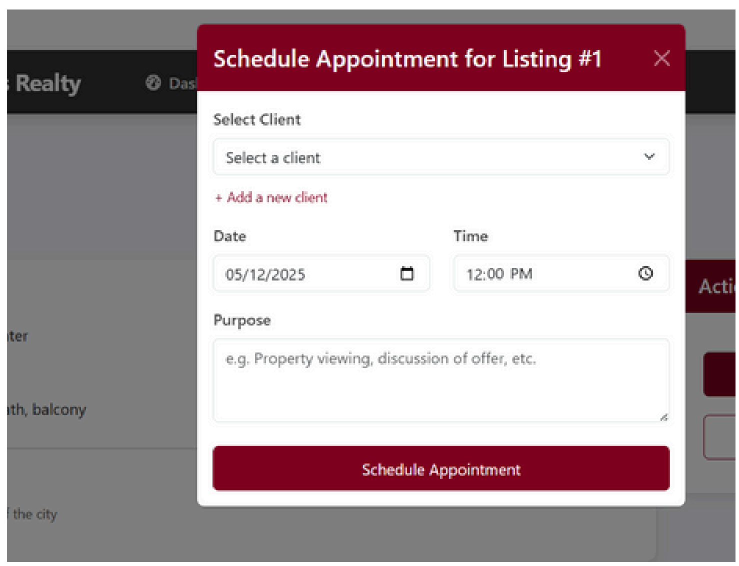
- navigate to listings

The Appointments tab allows users to view, create, update, and delete scheduled meetings between agents and clients regarding specific properties. This tab serves as the main hub for managing all appointment-related functions. Users can set up future property viewings and follow-ups with certain clients through this tab.

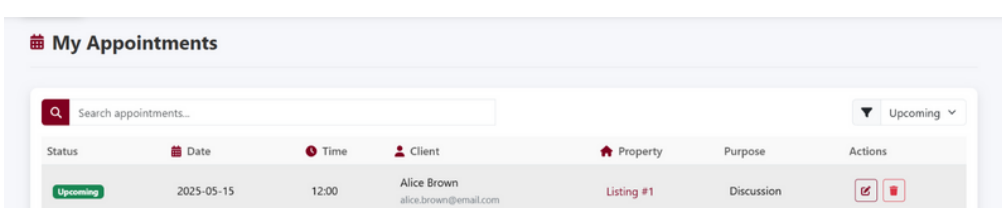
To manage appointments, users must first navigate to the Dashboard and select the Listings tab. Next, select which property the appointment will be made for. Upon selection, there will be a tab that says schedule appointment on the right-hand side of the screen.



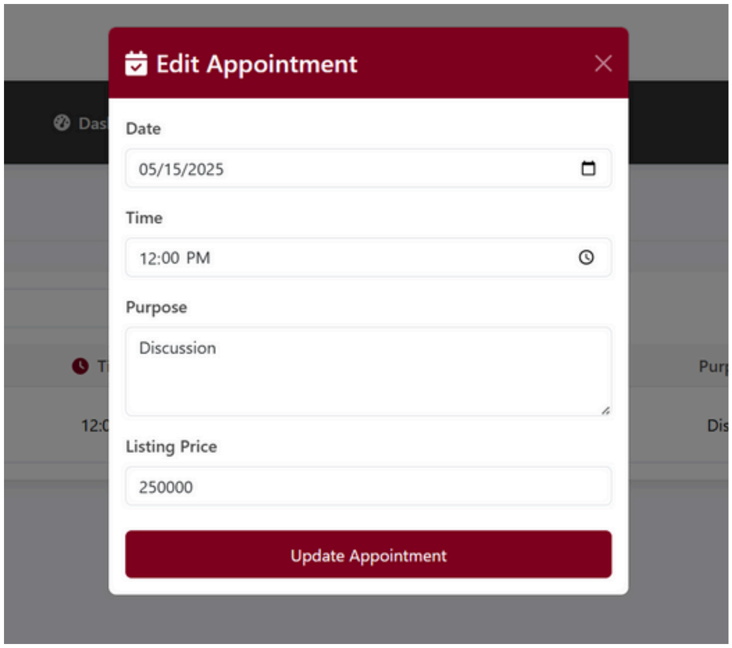
Once the schedule appointment tab is selected, a new tab will appear that allows the user to select a client to meet with. The user adds a time, date and reason for the appointment. Once the user adds the correct details, select schedule appointment at the bottom to confirm. The user can also click the exit button in the top right to cancel the current appointment being scheduled.



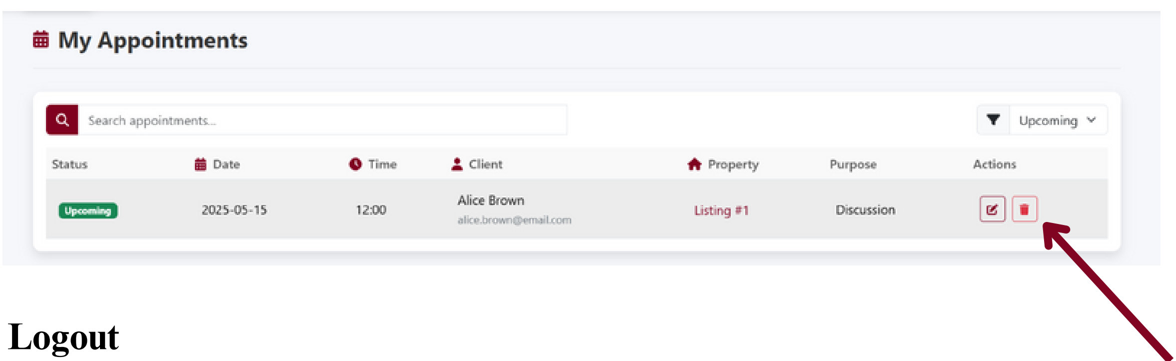
The user can now navigate to the dashboard and select the Appointment tab to view all upcoming and past appointments. Every appointment displays the status, date, time, client, property and purpose.



Existing appointments can be modified by clicking the Edit button to the right of the desired appointment. The edit window opens, and the user may then update any necessary information about the appointment.



Similarly, to delete an appointment, the user must select the delete button to the right of the desired appointment to remove it from the system. Confirmation is required to cancel the appointment in order to prevent mistakes.



3.5 Logout

In order to log out of the system, the user must return to the dashboard and select their name in the upper right-hand corner. Then select the "Logout" button from the drop-down menu. The user will then be logged out of the system and be asked to enter their information again to get back into the system.