NATIONAL ASSOCIATION of REALTORS®

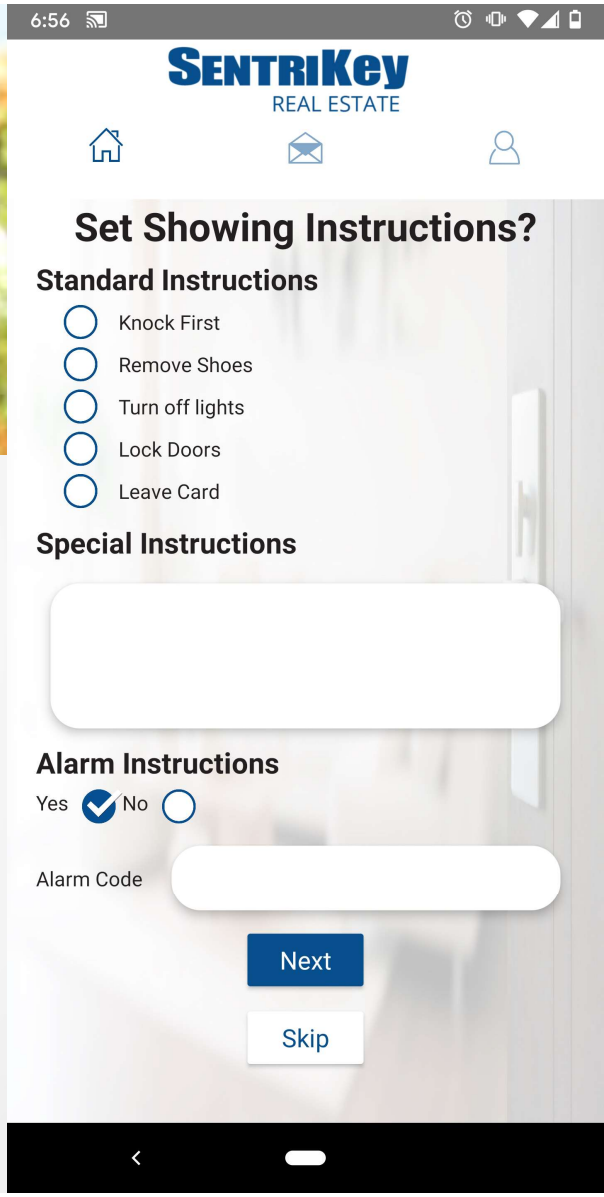
REALTOR Benefits® Program

Proud Partner

Property Access Settings

No more fumbling with papers or searching for alarm codes when showing a home. The SentriKey Real Estate app will display any stated showing instructions as soon as the app opens the lockbox key compartment.

- Centralize showing instructions and listing details into platform
- Minimize calls from showing agents regarding showing instructions
- Improve client satisfaction by reducing client frustrations

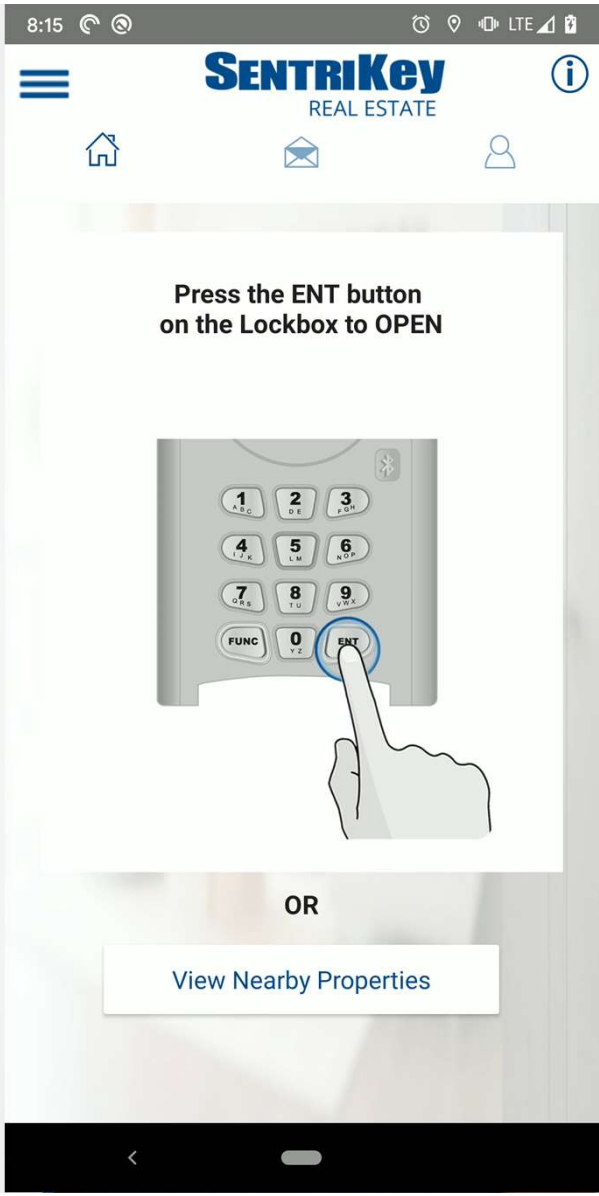


Property Access Settings Details

- This can only be done in the app
- You can set up the Property Access Settings two ways
  - Assigning a listing to a lockbox
  - By selecting the Property Access Settings and selecting the listing
- The property access settings follow the listing not the lockbox

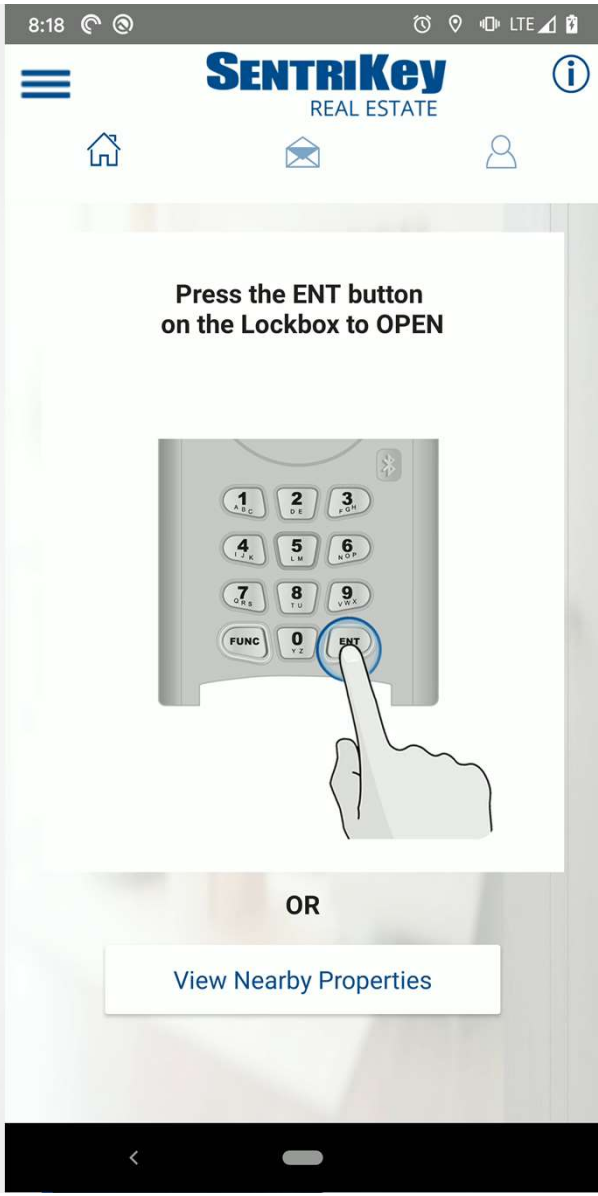
Property Access Settings Set Up
Assigning A Lockbox To The Listing

1. Tap the main menu
2. Tap 'My Lockboxes'
3. Tap Assign / Unassign Property
4. Select Lockbox
5. Select Listing
6. Tap 'Assign to Property'
7. Select Region
8. Confirm Listing Assignment
9. Tap the 'More Settings' button
10. The agent can set the showing instructions
11. When Finished, Tap 'Next'
12. Agent can set up homeowner notifications
13. When finished, tap 'Next'
14. Agent is prompted to turn on ABA
15. Success Confirmation is displayed



Property Access Settings Set Up
Direct Selection

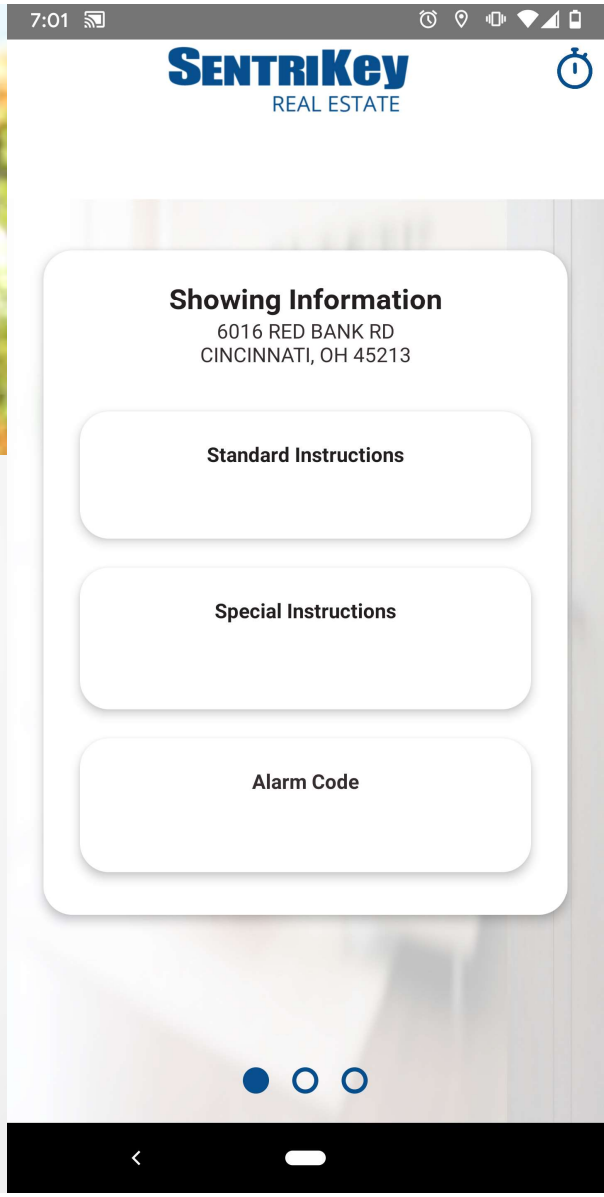
1. Tap the main menu
2. Tap 'My Lockboxes'
3. Tap 'Property Access Settings'
4. Select Listing (If it's not assigned, you'll be prompted to assign)
5. The agent can set the showing instructions
6. When finished, tap 'Next'
7. Agent can set up homeowner notifications
8. When finished, tap 'Next' or 'Skip'
9. Success Confirmation is displayed



Showing Agent Carousel

The Showing Agent Carousel sets showing agents up for success by centralizing showing information into one tool. After accessing the key compartment, SentriKey Real Estate will display showing instructions, property data such as bedrooms, baths, square footage and more appear.

- Empower showing agents to succeed by providing just-in-time information
- Decrease time spent by showing agents looking for showing instructions



Showing Agent Carousel Details

- Creates a new experience for showings
- Creates a three slide swipeable carousel
  - Showing Information
  - Listing Information
  - Listing Agent Information
- End Point: Manual End of Showing

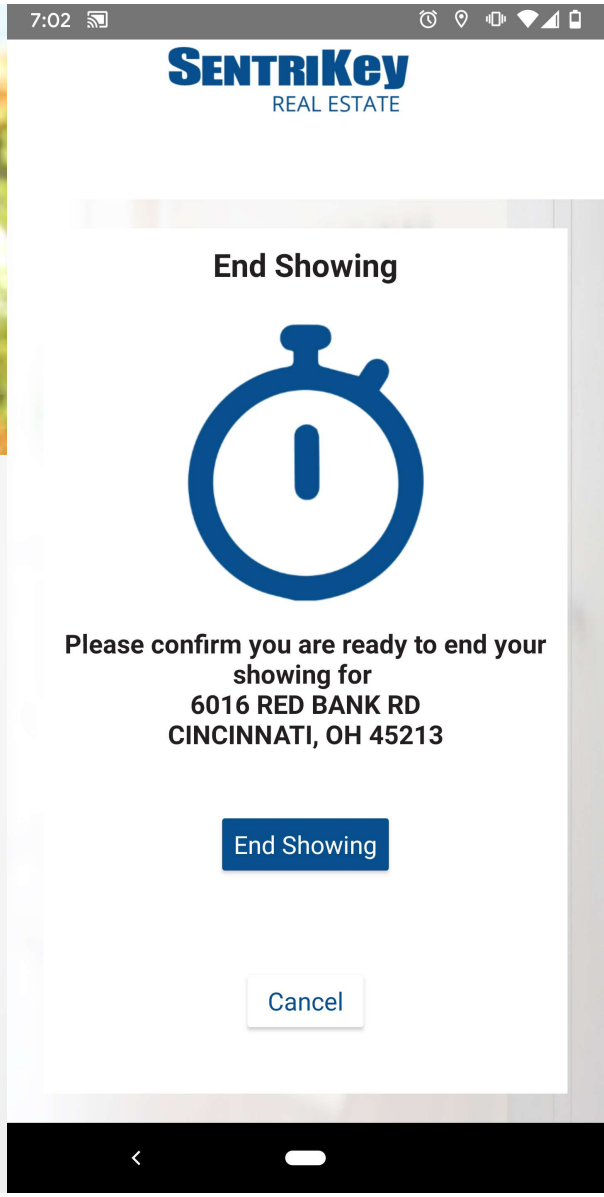
Showing Agent Carousel

1. After Accessing a Lockbox, swipe through carousel for:
    1. Showing Instructions
    2. Listing Details and access to listing detail integration
    3. Listing agent information
2. Once completed with showing, press the stopwatch at the top right

Manual End of Showing

With just one click, the showing agent can manually indicate that a showing has ended. This allows the homeowner to return to their residence in a timely manner.

- Better tracking for the end of showing
- More accurate end of showing notifications
- Reduced frustration from confusion around the 90-minute notification

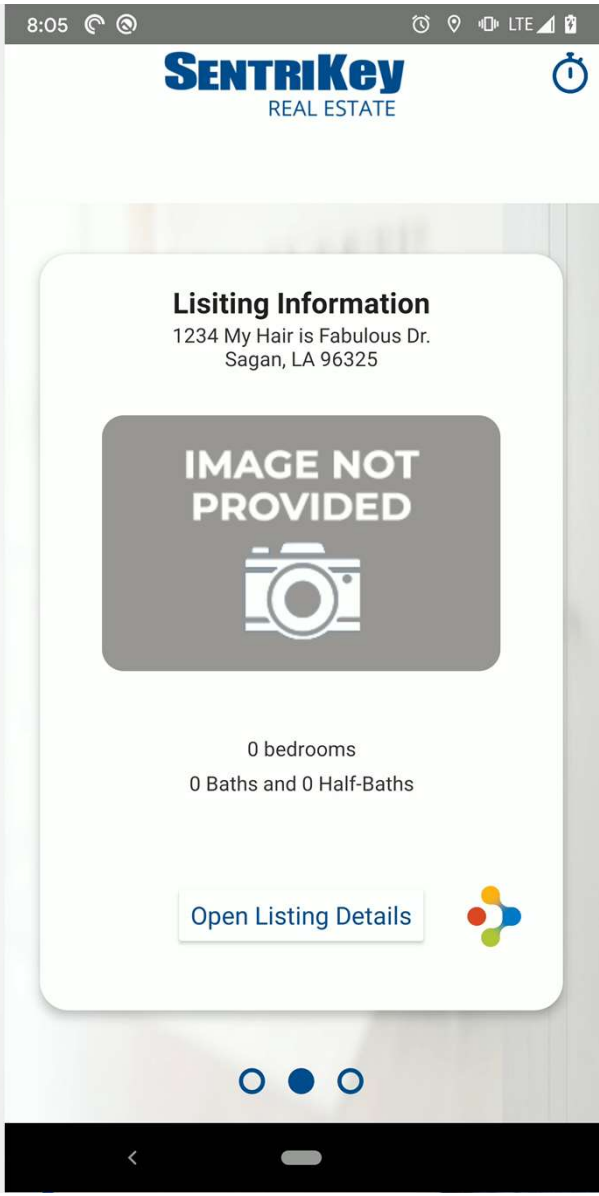


Manually End of Showing Details

- The stopwatch removes after 120 minutes
- Works with any lockbox
- Lockbox must be assigned to a listing
- Agent can minimize app and bring it back up
- Agent can go into any listing detail integration link and come back to app

Using Manual End of Showing

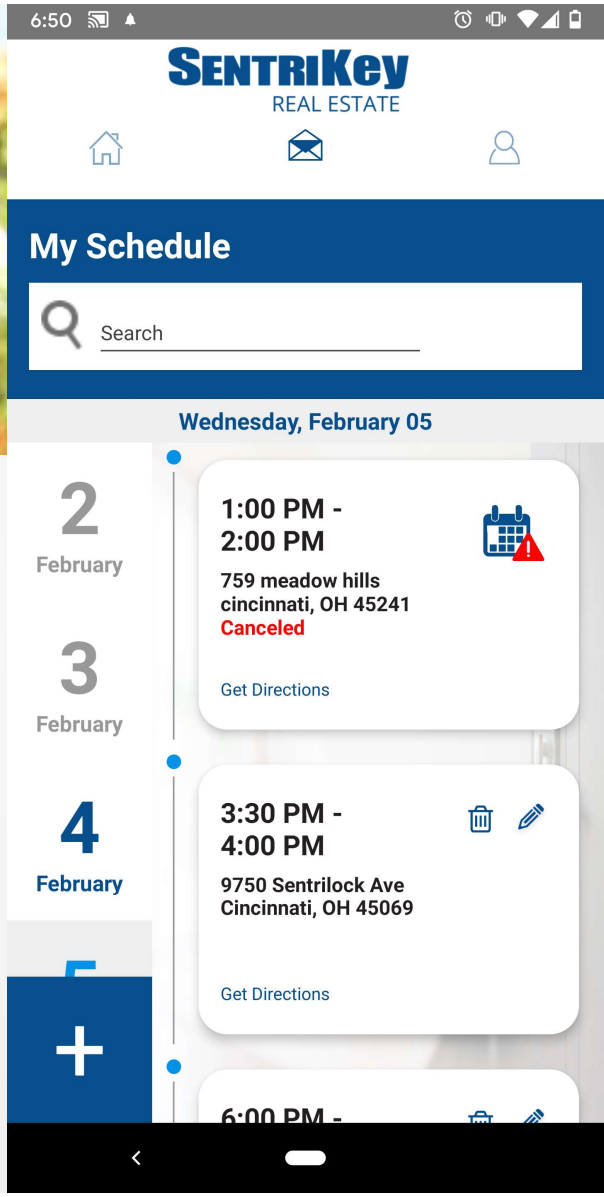
1. After Accessing a Lockbox
2. Swipe through carousel for:
    1. Showing Instructions
    2. Listing Details and access to listing detail integration
    3. Listing agent information
3. Once completed with showing, press the stopwatch at the top right
4. Confirmation will appear confirming end of showing
5. Agent will be asked if they need to return their key
6. They will get a success page letting them know that they've ended the showing
7. Returns user to home screen



My Schedule

There's a great way to keep track of showings you input in the app, and see your team's schedule, with the My Schedule function.

- Creates a free to use scheduling platform for agents without a tool
- Enhances visibility and trackability of your listings
- Sets the stage for ABA and future features/services



My Schedule Details

- Listing agents: Create, edit or cancel appointments
- Showing Agent: View and cancel appointments
- Canceled appointments stay on the calendar
- Cannot schedule appointments for team members in the app
- Can schedule multiple appointments on a listing for the same time/day
- Can schedule an appointment by:
  - My Lockboxes > Schedule Appointment
  - My Schedule > +
- They cannot save without entering all fields
  - They'll be prompted for the field/s they're missing

Adding New Appointment Steps
SKRE - My Lockboxes

1. Go to the main menu
2. Select My Lockboxes
3. Select Schedule Appointment
4. Select Listing
5. Select Showing Agent
6. Date and Time defaults to today and current time
7. Select Duration
8. Select Appointment Type
9. Select 'Schedule Appointment'
10. Agent will receive the success screen that their appointment has been created

Adding New Appointment
SKRE - My Schedule

1. Go to the main menu
2. Select 'My Schedule'
3. Select the Plus Sign and the steps will be the same
4. Select a listing
5. Select the Showing agent
6. Select a date and time
7. Select duration
8. Select an appointment type
9. Select Schedule Appointment
10. Agent will receive the success screen that their appointment has been created
11. There will be a message center notification sent to the listing agent and showing agent

Editing Appointment
SKRE

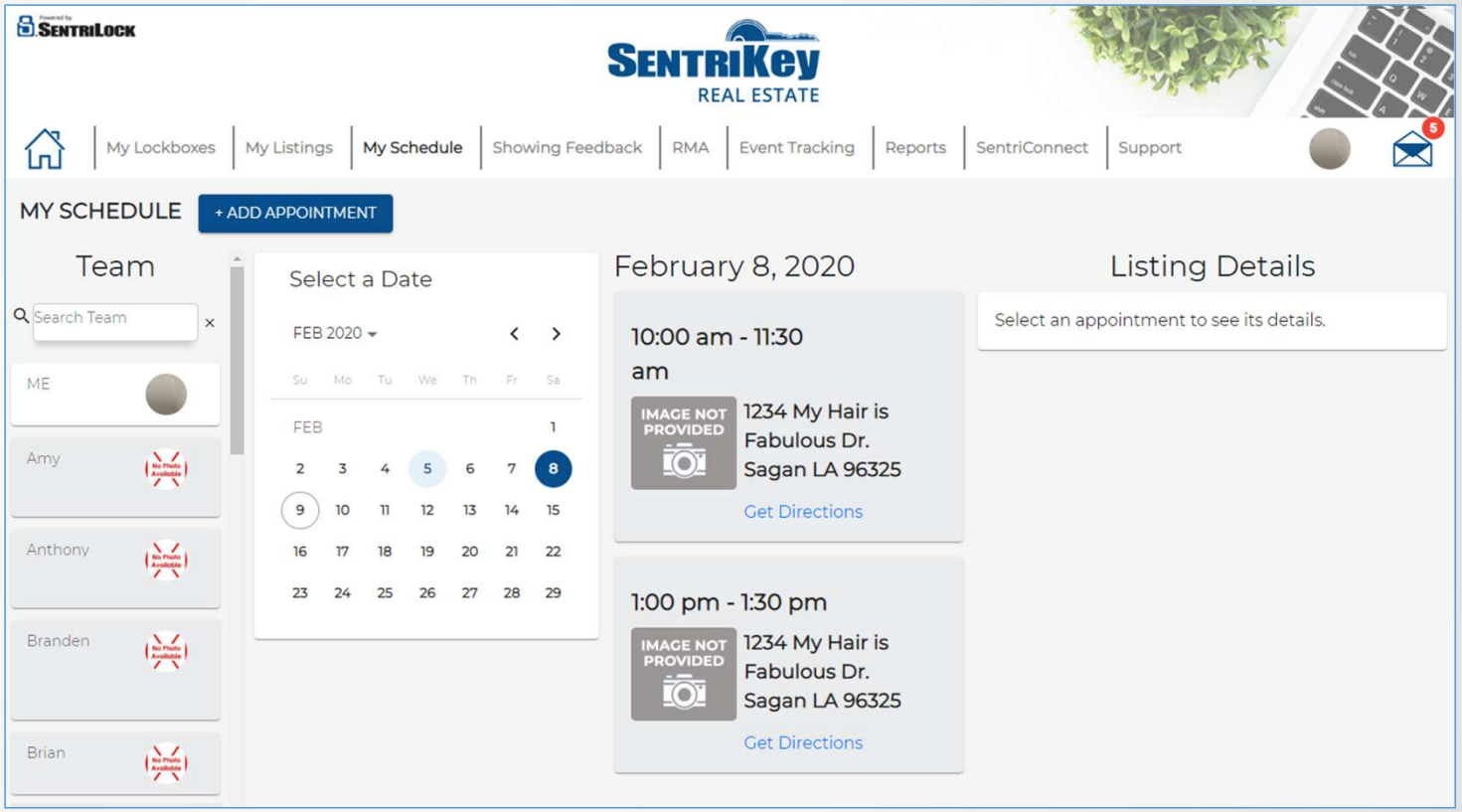
1. Go to the main menu
2. Select "My Schedule"
3. Select day of appointment
4. Select pencil
5. Tap on date/time box to change the date and/or time
6. Agent can change the duration
7. Agent can change the appointment type
8. Agent will get a success screen that the appointment has been modified
9. There will be a message center notification sent to the listing agent and showing agent

Cancelling Appointment
SKRE

1. Go to the main menu
2. Select 'My Schedule'
3. Select day of appointment
4. Select Trash Can
5. Agent will be prompted to confirm they want to cancel the appointment
6. Select 'Confirm'
7. Agent will get a success screen that the appointment has been canceled
8. Select Done
9. Calendar will update appointment and it'll show a canceled badge
10. There will be a message center notification sent to the listing agent and showing agent

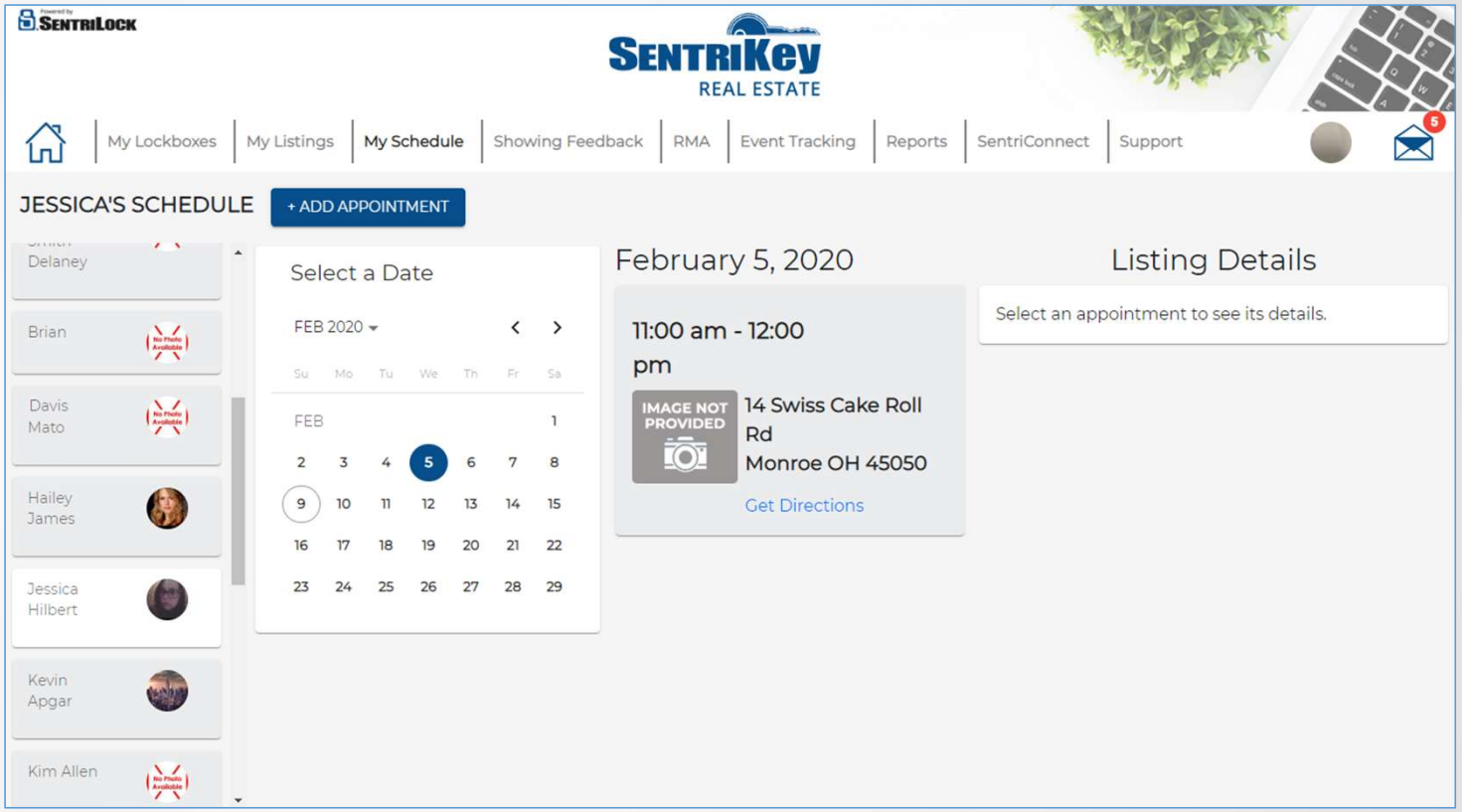
My Schedule
Agent

- Select a date on calendar to view appointments
- Add, edit or delete any of their appointments
- Select an appointment to view listing details
- Select profile icon to go to 'My Account'
- Select the envelope icon to view message center
- Select home icon to return to main page
- The agent can schedule multiple appointments for the same time at the same listing



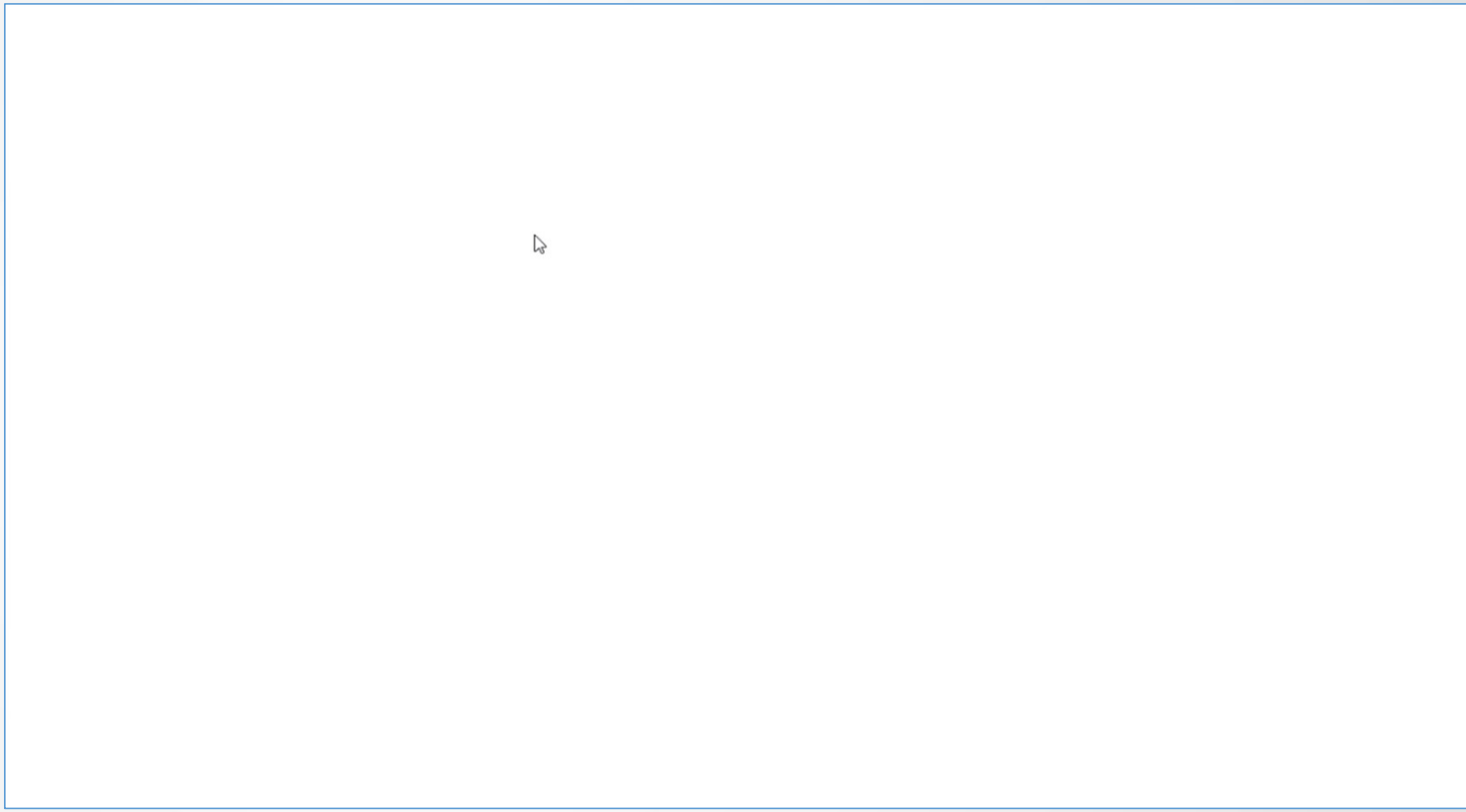
My Schedule Team

- View all team members
- Searchable team list
- Click on team member name to:
  - View appointments
  - Add, edit or cancel appointments
  - View the listing details for any appointment of the selected team member
- When adding an appointment for a team member
  - The agent is searching their team members listing
- The agent can schedule multiple appointments for the same time at the same listing



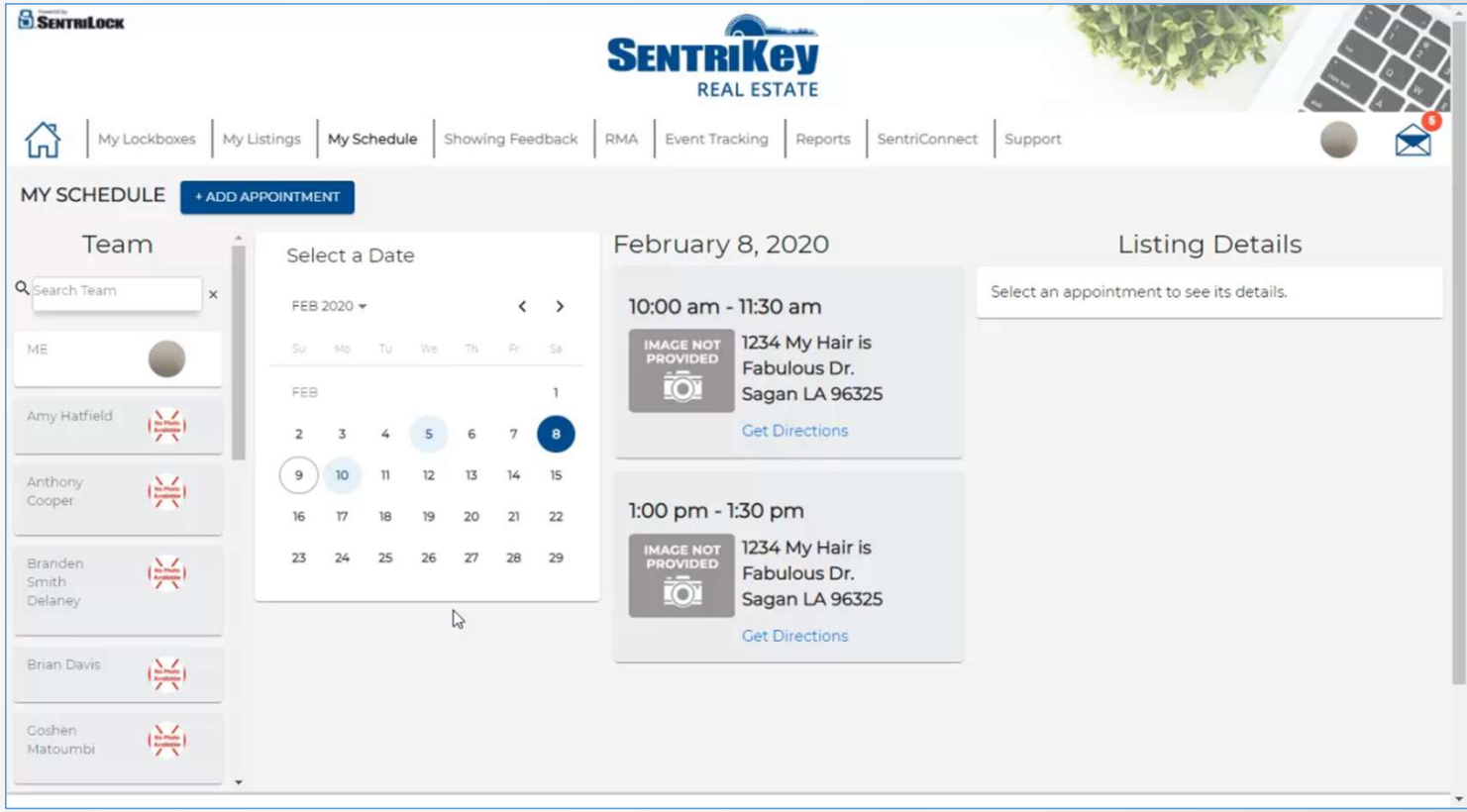
Adding An Appointment Website

1. Search for a listing address
2. Select a date on the calendar
3. Fill out showing information
    1. Showing Agent
    2. Duration
    3. Start time
4. Press 'Schedule Now' and will receive a success page
    - Both listing agent and showing agent receive a message center notification that an appointment was created



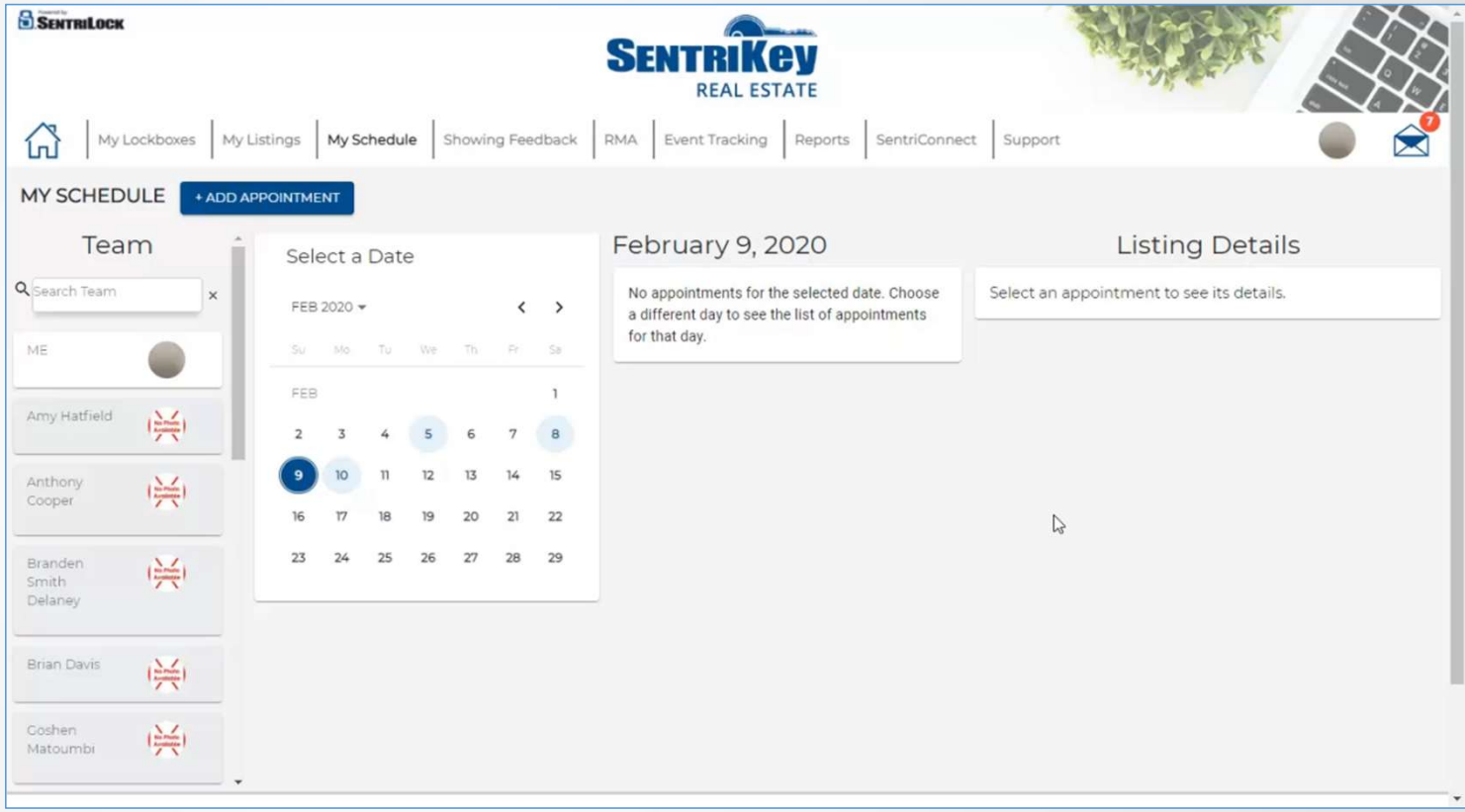
Editing An Appointment Website

1. Select a date on the calendar
2. Select the pencil
3. Edit details as needed
    1. Date
    2. Duration
    3. Appointment type
    4. Start Time
4. Agent will get the success screen for modifying the appointment
5. The listing agent and showing agent will get a message center notification that the appointment was modified



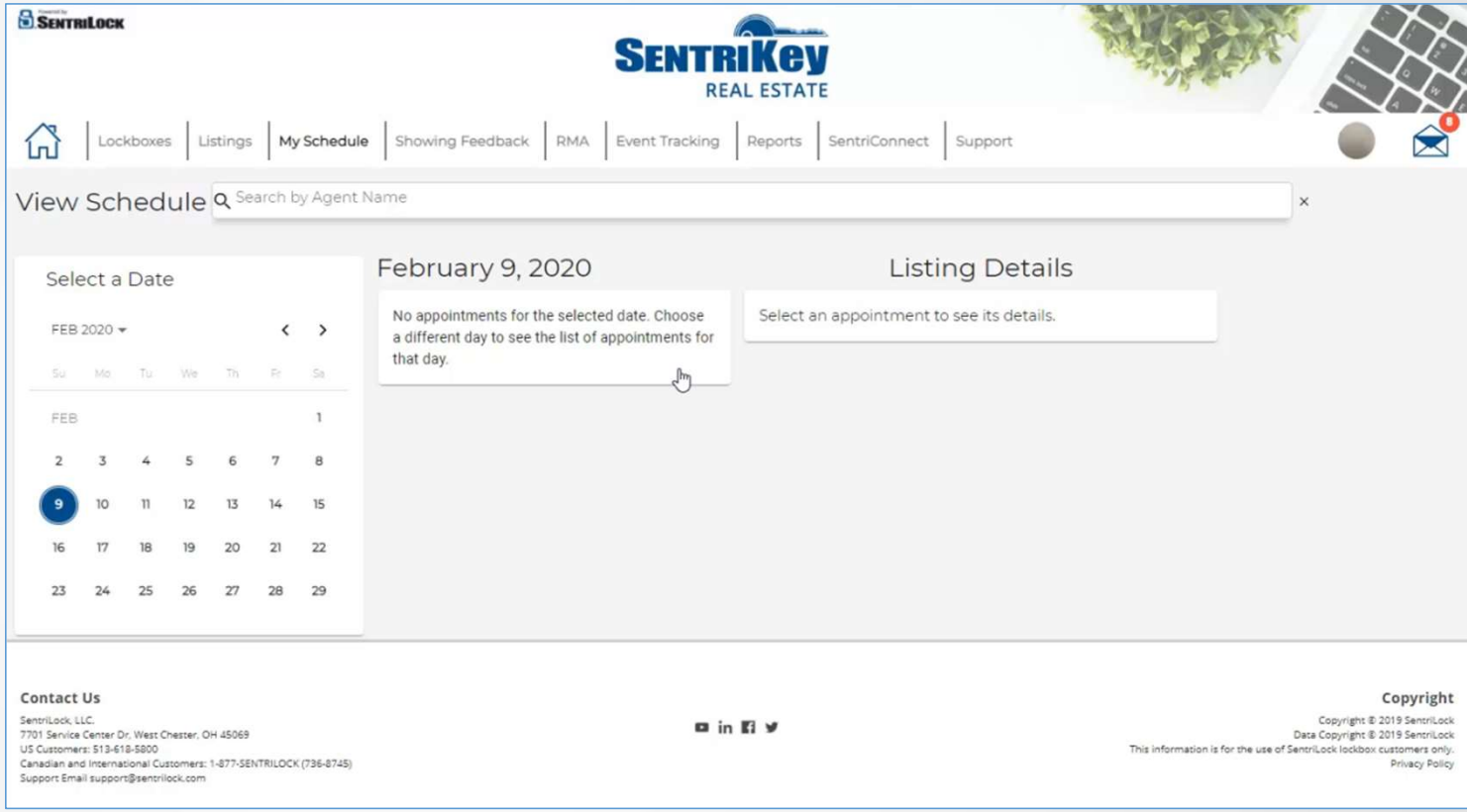
Canceling Appointment Website

1. Listing or Showing Agent would select the date of the appointment on the calendar
2. They would select click on the trash can
3. The agent will get a confirm page asking them if they're sure they want to take this action
4. Once the user presses on 'Confirm' the appointment will be cancelled
5. The calendar will update the appointment with a cancelled badge
6. The showing agent and listing agent will receive a message center notification that the appointment was cancelled



My Schedule Support Website

1. Search for agent
2. Click on day in calendar to view scheduled appointments
3. Click on appointment to view appointment details
   - No date limit
   - Read only
   - Alarm codes not viewable



Thanks so much.