Rocket Homes

An Introduction To

ClientCentral

701 Griswold Street, Detroit, MI 48226 • Rocket.com

January 14, 2025

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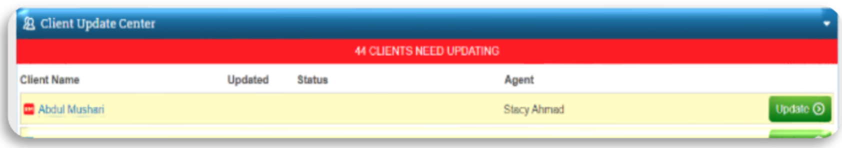
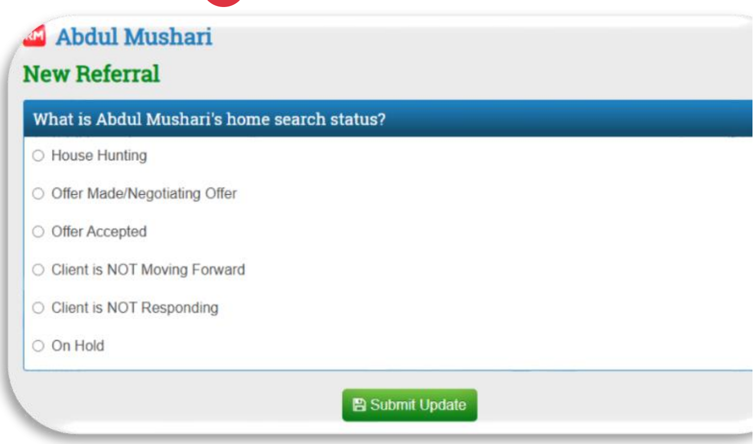
Client Update Center

Every client must be updated within 1 hour of assignment, major milestones, or a minimum of the 1st and 15th of every month. We know that the longer the client list, the more challenging it may be to remember which clients still require an update. This is where the Client Update Center comes in — any client that is past due will be listed in the Client Update Center every time you log in. The update center will appear on your dashboard upon login. *The update will be considered on-time if it is provided within 10 days prior to the 1st or the 15th.*

Update Center 1



Update Client 2

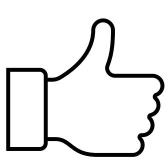


Update Center 3

Follow these three easy steps to keep all your clients updated!

1. Click the "Update" link to access their update form.
2. Provide the update and any additional information regarding the clients' status.
3. The updated client will no longer be listed in the Update Center on your dashboard.

Notice that client gets "checked off" after you update their information.



You'll find The Client Update Center under the "My Dashboard" tab.

But only if you have an update on a client that is currently past due.

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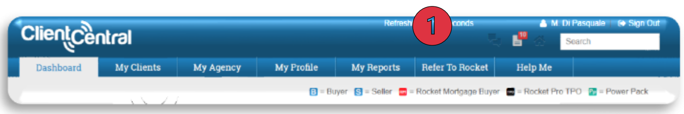
Notifications And Referrals

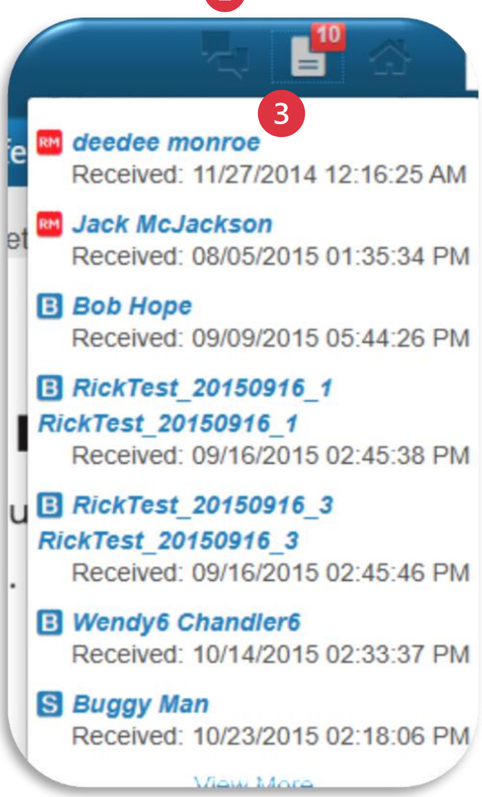
Receiving and accepting a new referral is easier than ever! At any time while you are in Client Central, you will be automatically notified when you receive a new referral. With just a few quick clicks, you are now able to accept AND assign a referral to any of your agents.

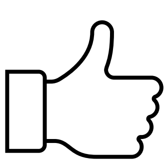


Accepting and assigning a new client referral:

1. When receiving a new referral, a number will appear next to the new CPRA icon within the notification bar.
2. Click on the icon to see a list of the referrals you have waiting for you.
3. Clicking on a client's name will take you to that client's detail page.

<u>Notifications & Referrals</u>





The Notification Bar can be found site wide.

Notifications are automatically updated every 15 seconds!

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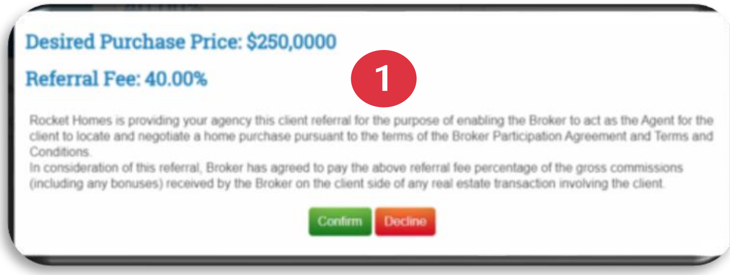
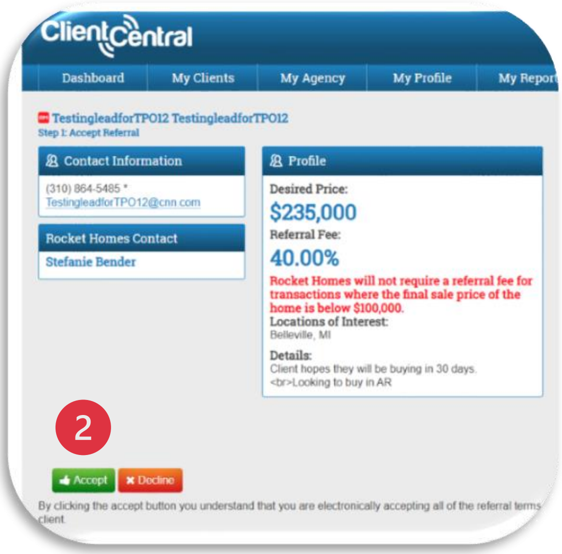
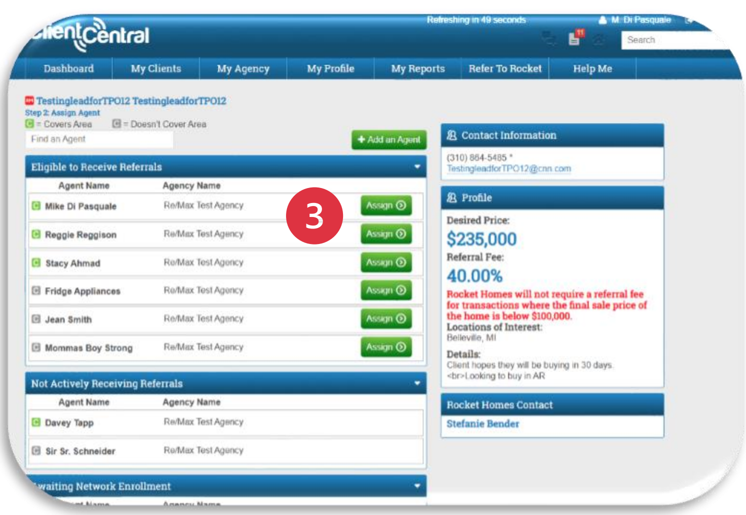
Notifications And Referrals cont.



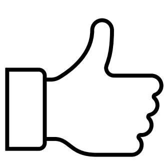




Accepting and assigning a new client referral:

1. A confirmation message will appear that outlines our legal disclaimer and referral fee for this transaction.
2. Click the “Accept Referral” button to assign this client to one of your agents.
3. Assign the client to the proper agent by clicking the “Assign” button.

If you don’t see the agent you want to assign this client to, they may be ineligible to receive referrals and can be found listed beneath the eligible agents. You may also add a new agent.

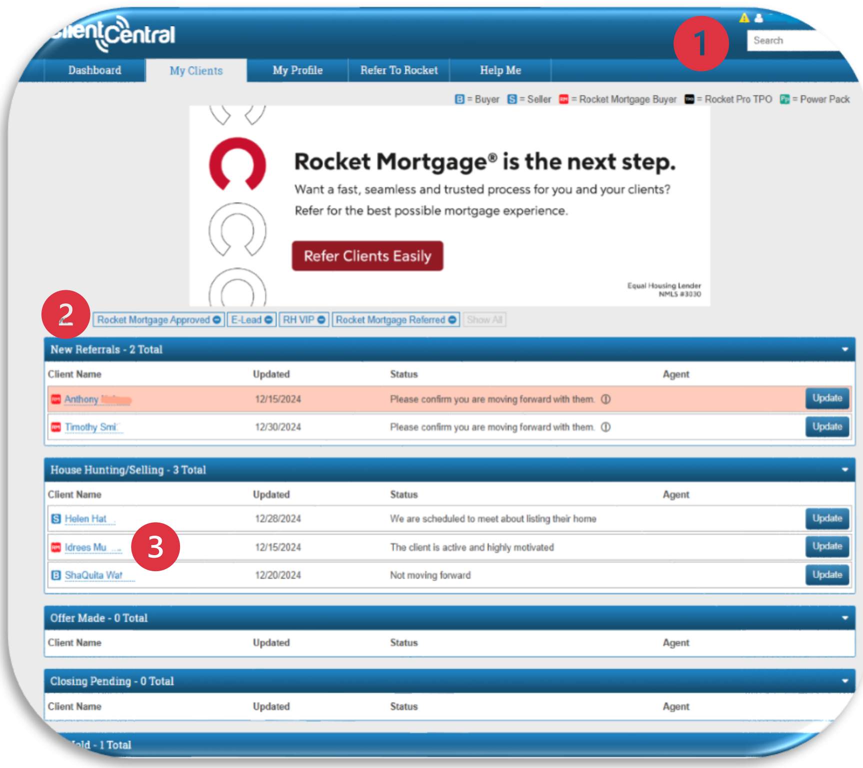


Referrals should not be declined unless the area needs to be removed from the agency’s coverage.

If declining due to agency’s coverage area, please make sure to update your coverage as well.

Client List

We now list each of your clients based upon where they are at in the house hunting or selling process. On top of having all your clients at your fingertips, we also provide their most up-to-date status update and access to the update form directly from the list – all the way from your new referrals to the clients you've indicated are on hold.



You can view a full client list in the "My Clients" tab:

1. Search for a specific client by typing the first few letters of their first or last name in the search bar and all
2. On the "My Clients" page, your clients will be listed in order of their transaction status.
3. You can access the clients' detail page by clicket on their name.

You'll find the Clients List under the "My Clients" tab.

If you manage clients for your entire agency, you will see all clients for your agency.

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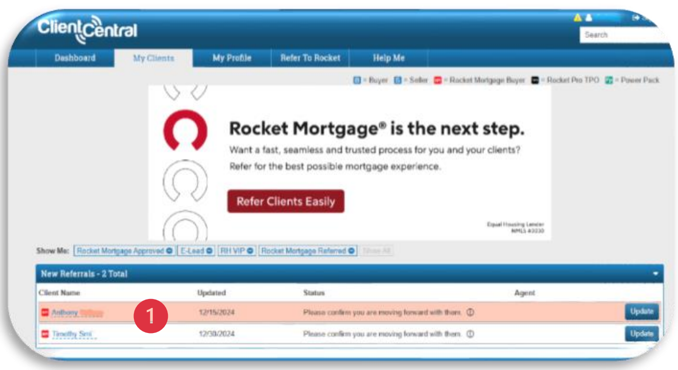
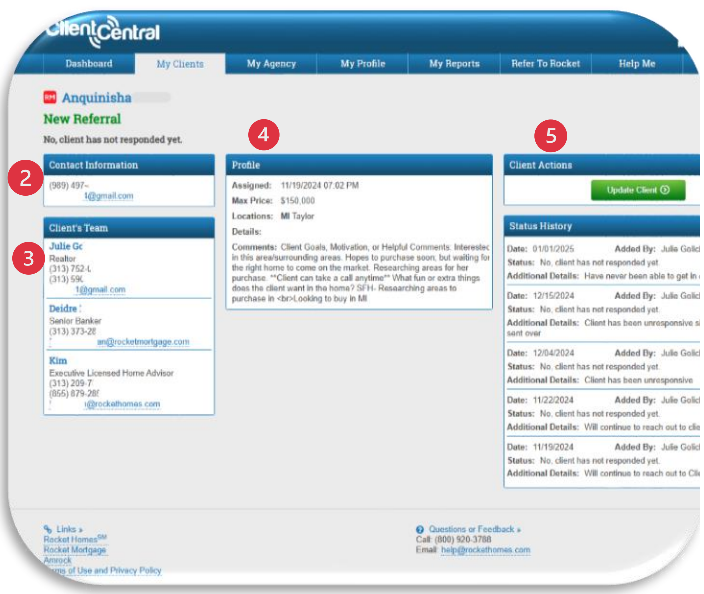
Client Details

All your current, active client's information can easily be located on the My Clients tab, by clicking on their name and pulling up the Client Profile.

Client List



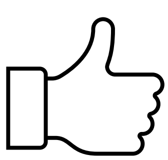
Client Details



To access a client's details, click a client's name in the Client List to find:

1. Select the Client's name from the My Clients tab.
2. Their contact information, including their full name, phone number and email address.
3. Their Rocket Team including the banker and loan processor and Licensed Home Coordinator.
4. Their transaction information, including price point, location, and any additional details we've gathered.

   A button to access the client's Welcome Letter.
5. Update and view the Client's history.



Here you will find the contact information for your client's team.

Your Listing Home Advisor can assist you with contacting your client. The Rocket Mortgage banker can assist with updating approval letters or any finance questions.

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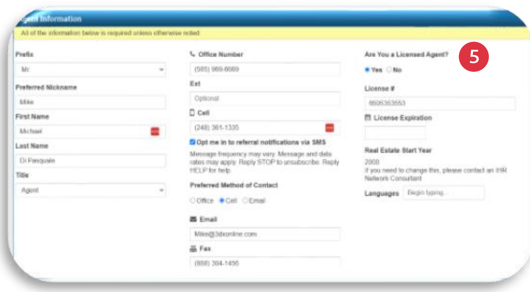
Your Profile

Every time you are matched to a client, we share some of your information with them. This means it's important that you keep your profile information up to date so that we provide every client with the correct information and able to match you up correctly.

Edit Profile

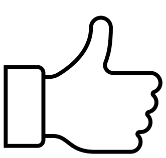


Your profile page includes:

1. Your personal information.
2. Your Agency information.
3. Ability to edit your information or coverage, change your password or edit your agency if you have the access.

Vital information to always keep up to date:

4. Coverage area edited from the Personal Actions section.
5. License information.
6. Designations and certifications.



Anyone with access to Client Central can make updates.

Agents – ensure that your contact information is always up to date and manage your lead flow for when you are not available (vacations, etc.).

Main Contacts, Brokers, Relocation Directors – you can adjust your agency's information, as well as that of individual agents.

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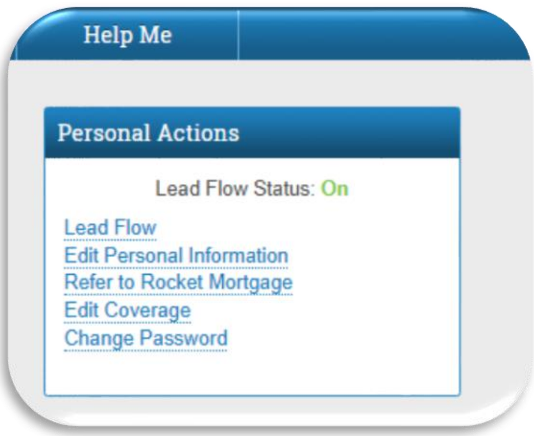
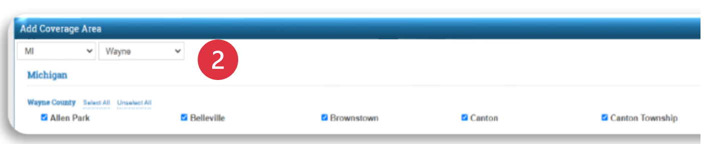
Coverage Area

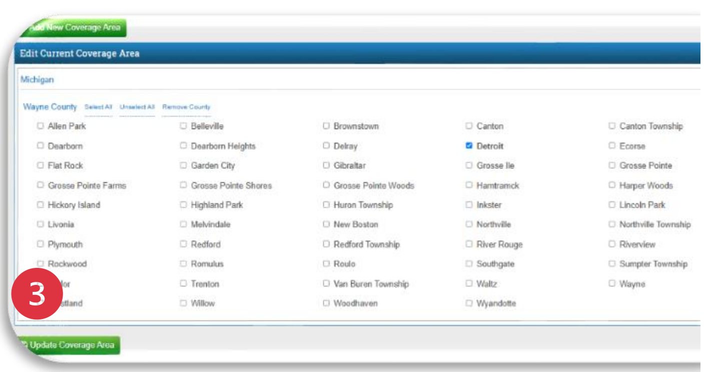
To provide you with referrals, we must know what cities you cover. Keeping your coverage area up to date means we can use this information to match you with clients that are looking to buy a home or sell their home in that area.

My Profile



Coverage Area





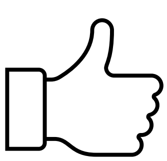
Your coverage area can be viewed and edited within the "my Profile" tab:

1. Click "Edit Coverage to make changes.

   Review your current coverage area to make sure it is up to date.

2. Add additional coverage at the top of the edit page. Select the drop-down for State and County.

3. Edit current coverage at the bottom of the edit page.



You'll find your coverage area listed under the "My Profile" tab.

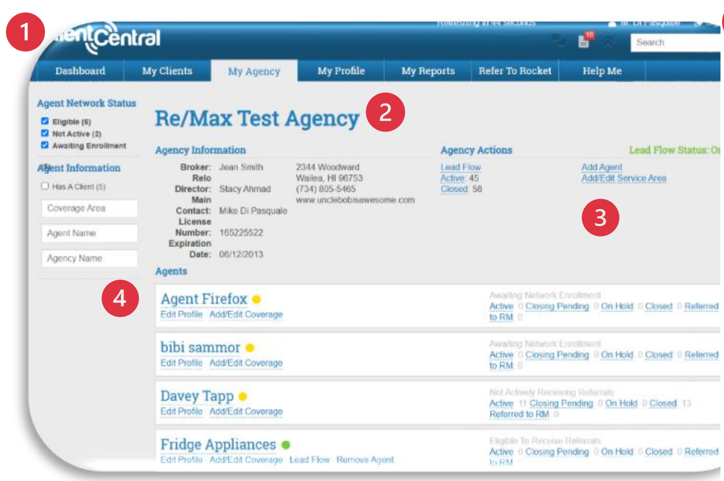
Agents: Update your coverage area any time there is a change (multi-state is an option if needed).

Main Contacts, Brokers, and Relocation Directors: You can adjust your agency's coverage, as well as that of individual agents.

Your Agency's Profile

We know that your agency's broker or even a designated agent for your agency needs to have access to more than just their own information. To help, we have included additional tabs on your broker's profile (or a designated agent's) profile page.

My Profile/Agency Service Area Tab



Your Agency page includes:

1. Your agency information.
2. Your agency actions and the ability to edit your information or add an agency.
3. Add agents and add/edit the service area.
4. A list of your agents based on their status.

To update the agency's information, click the "Edit Agency Information" under the "My Agency" tab.

These items will only show up if you are designated as a Broker, Relocation Director, or the Main Contact for your agency.

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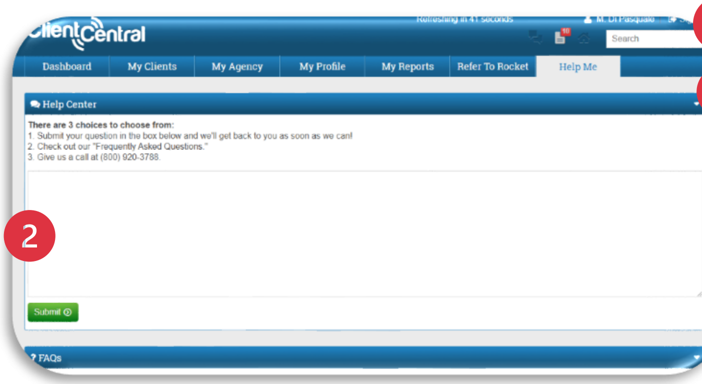
Help Center

We know there are going to be times that you have questions regarding Client Central or even suggestions on ways that can improve it. That is why we created the “Help Me” page – you have access to our FAQs and a straightforward way to submit feedback or questions.

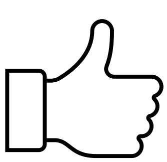
Help Center



Three ways to get help:

1 Call us during business hours.

2 Submit your question or feedback directly in the Help Center.



You will find all the help you need on the “Help Me” tab.

Remember, this is also a suitable place to provide us feedback on Client Central.