

ROCKET Homes

An Introduction To

ClientCentral

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

January 1, 2022



Welcome To Client Central!

The Marketing and Technology teams here at Rocket Homes Real Estate LLC have joined forces over the past several months to bring you the next round of exciting changes in Client Central. Our goal is to improve your mobile experience, so that making updates to your clients is as quick and easy as possible.

Are you at a showing and your client just made an offer? You can use your tablet to quickly and easily provide us the update. Did the buyer's agent just call to accept a counter-offer on your client's home? No problem! Just update the client after you end the call right from your smart phone.

No matter what role you play — an agent, main contact, relocation director, or broker — you'll see improvements to the features you use most.

So pull out your smart phones and power up those tablets to see what we've done. We think you'll give this round of improvements a big thumbs up!

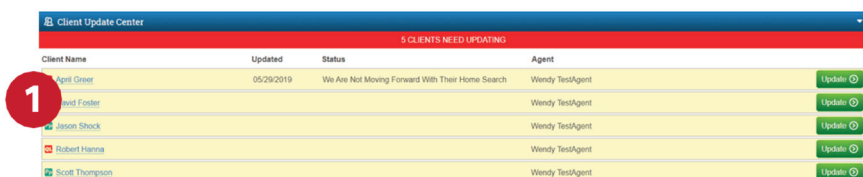
Sincerely,

Account Director Team At Rocket HomesSM

Client Update Center

Every client must be updated by 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.

Update Center

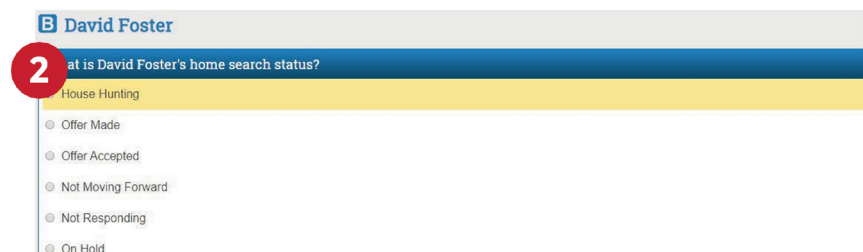


Client Name	Updated	Status	Agent	
April Greer	05/29/2019	We Are Not Moving Forward With Their Home Search	Wendy TestAgent	Update
David Foster			Wendy TestAgent	Update
Jason Shock			Wendy TestAgent	Update
Robert Hanna			Wendy TestAgent	Update
Scott Thompson			Wendy TestAgent	Update

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.

Update Client Status



B David Foster

2 What is David Foster's home search status?

House Hunting

Offer Made

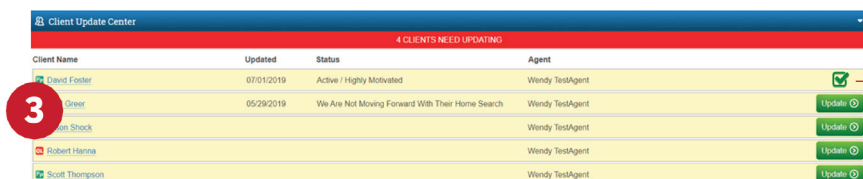
Offer Accepted


Not Moving Forward

Not Responding

On Hold

Update Center



Client Name	Updated	Status	Agent	
David Foster	07/01/2019	Active / Highly Motivated	Wendy TestAgent	
April Greer	05/29/2019	We Are Not Moving Forward With Their Home Search	Wendy TestAgent	Update
Jason Shock			Wendy TestAgent	Update
Robert Hanna			Wendy TestAgent	Update
Scott Thompson			Wendy TestAgent	Update

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.

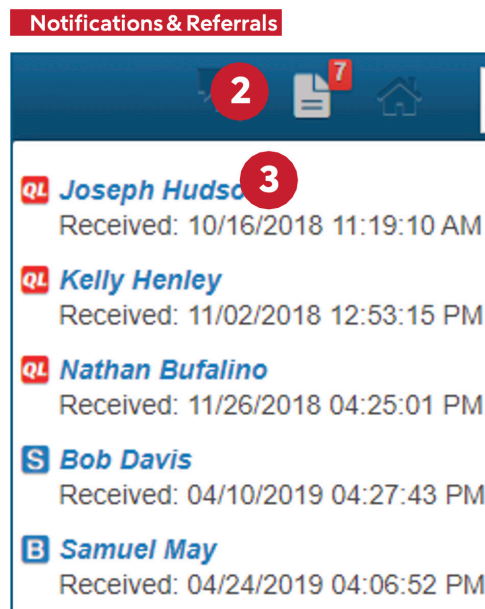
Notifications And Referrals

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 quick few 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.



The Notification Bar can be found site-wide.

Notifications are automatically updated every 15 seconds!

Notifications And Referrals cont.

Desired Purchase Price: \$150,000
Referral Fee: 35.00%

In-House Realty is providing your agency this client referral for the purpose of enabling the Broker to act as the Agent for the client to locate and negotiate a home purchase pursuant to the terms of the Broker Participation Agreement and Network Guidelines.

In consideration of this referral, Broker has agreed to pay the above referral fee percentage of the gross commissions (including any bonuses) received by the Broker on the client side of any real estate transaction involving the client.

1

Barry Brown
Step 1: Accept Referral

Contact Information

(256) 613-3812 *
bb92354@aol.com

Profile

Desired Price:
\$150,000

Locations of Interest:
Allentown, AZ Alpine, AZ Burnt Water, AZ Chambers, AZ Chinle, AZ

Details:
Client hopes to buy within 31-60 days. Would like a home within ~5-10 miles of Wellington, AL. preferred contact time: after 4 PM

Quicken Loans
Engineered to Amaze

Quicken Loans is the client's chosen lender. Any purposeful steering is prohibited. Also, Quicken Loans does not lend on manufactured homes or co-ops.

In-House Realty Contact

Robert Balding
Exec. Agent Coordinator
(313) 373-6641 *
(877) 388-3680
(248) 622-1627
RobertBalding@inhouse Realty.com

2

By clicking the accept button you understand that you are electronically accepting all of the referral terms and conditions related to working with this client.

Barry Brown
Step 2: Assign Agent

Assign to Agent

Eligible to Receive Referrals

Agent Name	Agency Name	
Nicole Styers	Prudential Amb and Shoe	3 <input type="button" value="Assign"/>
Rene Owen	Prudential Amb and Shoe	<input type="button" value="Assign"/>
Diane Burrows	Prudential Amb and Shoe	<input type="button" value="Assign"/>
Mary Lanahan	Prudential Amb and Shoe	<input type="button" value="Assign"/>
Cynthia English	Prudential Amb and Shoe	<input type="button" value="Assign"/>
Clint Smith	Prudential Amb and Shoe	<input type="button" value="Assign"/>
Sean Davis	Prudential Amb and Shoe	<input type="button" value="Assign"/>
Victoria Gaunt	Prudential Amb and Shoe	<input type="button" value="Assign"/>
Poppy Elwell	Prudential Amb and Shoe	<input type="button" value="Assign"/>
Tina Treusdell	Prudential Amb and Shoe	<input type="button" value="Assign"/>
Ray Leone	Prudential Amb and Shoe	<input type="button" value="Assign"/>

Contact Information

(256) 613-3812 *
bb92354@aol.com

Profile

Desired Price:
\$150,000

Locations of Interest:
Allentown, AZ Alpine, AZ Burnt Water, AZ Chambers, AZ Chinle, AZ

Details:
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In-House Realty Contact

Robert Balding
Exec. Agent Coordinator
(313) 373-6641 *
(877) 388-3680
(248) 622-1627
RobertBalding@inhouse Realty.com

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.

ROCKET Homes

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 of your clients at your fingertips, we also provide their most recent status update and access to the update form direct from the list — all the way from your new referrals to the clients you've indicated are on hold.

Profile

Desired Price:
\$250,000

Referral Fee:
35.00%

Locations of Interest:
Addison Township, MI Auburn Hills, MI Berkley, MI Beverly Hills, MI Bingham Farms, MI

Details:
Client is interested in Single Family Home.

Quicken Loans
Engineered to Amaze

Quicken Loans is the client's chosen lender. Any purposeful steering is prohibited. Also, Quicken Loans does not lend on manufactured homes or co-ops.

Rocket Homes is providing your agency this client referral for the purpose of enabling the Broker to act as the Agent for the client to locate and negotiate a home purchase pursuant to the terms of the Broker Participation Agreement and Terms and Conditions.

In consideration of this referral, Broker has agreed to pay the above referral fee percentage of the gross commissions (including any bonuses) received by the Broker on the client side of any real estate transaction involving the client.

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 matches will appear.
- 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 clicking on their name.

Joseph Hudson
Step 1: Accept Referral

Contact Information
(313) 884-3060 *
josephhudson313@test.com

Rocket Homes Contact
Kelly Grace
Executive Agent Coordinator
(313) 373-6612 *
(877) 362-1465
(248) 930-6311
KellyGrace@rockethomes.com

Profile
Desired Price:
\$250,000

Referral Fee:
35.00%

Locations of Interest:
Addison Township, MI Auburn Hills, MI Berkley, MI Beverly Hills, MI Bingham Farms, MI

Details:
Client is interested in Single Family Home.

Quicken Loans
Engineered to Amaze

Quicken Loans is the client's chosen lender. Any purposeful steering is prohibited. Also, Quicken Loans does not lend on manufactured homes or co-ops.

Rocket Homes is providing your agency this client referral for the purpose of enabling the Broker to act as the Agent for the client to locate and negotiate a home purchase pursuant to the terms of the Broker Participation Agreement and Terms and Conditions.

In consideration of this referral, Broker has agreed to pay the above referral fee percentage of the gross commissions (including any bonuses) received by the Broker on the client side of any real estate transaction involving the client.

By clicking the accept button you understand that you are electronically accepting all of the referral terms and conditions related to working with this client.

Joseph Hudson
Step 2: Assign Agent

Covers Area Doesn't Cover Area

Find an Agent

Eligible to Receive Referrals

Agent Name	Agency Name	Assign
Andrea Testagent	Rocket Homes Test Agency	<input type="button" value="Assign"/>
Robert Testagent	Rocket Homes Test Agency	<input type="button" value="Assign"/>
Wendy TestAgent	Rocket Homes Test Agency	<input type="button" value="Assign"/>

Contact Information
(313) 884-3060 *
josephhudson313@test.com

Profile
Desired Price:
\$250,000

Referral Fee:
35.00%

Locations of Interest:
Addison Township, MI Auburn Hills, MI Berkley, MI Beverly Hills, MI Bingham Farms, MI

Details:
Client is interested in Single Family Home.

Rocket Homes Contact
Kelly Grace
Executive Agent Coordinator
(313) 373-6612 *
(877) 362-1465
(248) 930-6311
KellyGrace@rockethomes.com

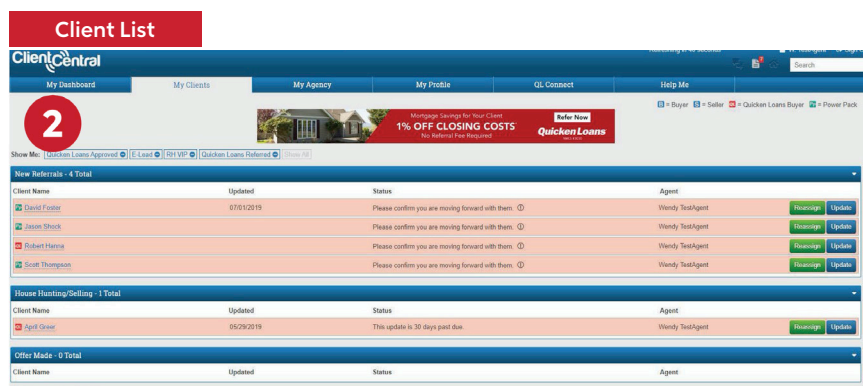


You'll find the Client List under the “My Clients” tab.

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

Client Details

All your client's information can easily be located by clicking on their name and pulling up the Client Profile.



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

1 Their contact information, including their full name, phone number and email address.

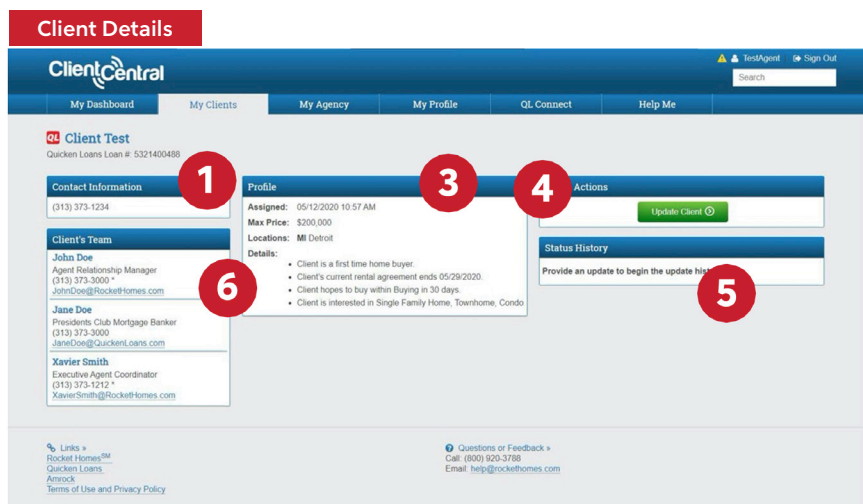
2 The only clients that will not be available are those that you've indicated you are no longer working with.

3 Their Rocket Mortgage® banker and loan processor's information.

4 Their transaction information, including price point, location and any additional details we've gathered.

5 A button to access the client's Welcome Letter.

6 Your Account Coordinator, banker and Relationship Manager's contact information



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

Your Agent Coordinator can assist you with getting in contact with your client. The Rocket Mortgage banker or Relationship Manager can assist with updating approval letters or any finance questions.

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 are able to match you up correctly.

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.

Important information to always keep up to date:

- 4 Coverage area.
- 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 (vacation, etc.).

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

Coverage Area

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

My Profile

1 Area(s)
Click edit if you need to add or remove any of your coverage areas.

Michigan 2 / 83 Counties

Oakland County 69 / 69 Cities

Wayne County 49 / 49 Cities

Edit Coverage Area

2 Michigan

3

County Select All Unselect All

<input checked="" type="checkbox"/> Allen Park	<input checked="" type="checkbox"/> Belleville	<input checked="" type="checkbox"/> Brownstown	<input checked="" type="checkbox"/> Canton	<input checked="" type="checkbox"/> Canton Township
<input checked="" type="checkbox"/> Dearborn	<input checked="" type="checkbox"/> Dearborn Heights	<input checked="" type="checkbox"/> Detroit	<input checked="" type="checkbox"/> Ecorse	<input checked="" type="checkbox"/> Ecorse
<input checked="" type="checkbox"/> Flat Rock	<input checked="" type="checkbox"/> Garden City	<input checked="" type="checkbox"/> Gibraltar	<input checked="" type="checkbox"/> Grosse Ile	<input checked="" type="checkbox"/> Grosse Pointe
<input checked="" type="checkbox"/> Grosse Pointe Farms	<input checked="" type="checkbox"/> Grosse Pointe Shores	<input checked="" type="checkbox"/> Grosse Pointe Woods	<input checked="" type="checkbox"/> Hamtramck	<input checked="" type="checkbox"/> Harper Woods
<input checked="" type="checkbox"/> Hickory Island	<input checked="" type="checkbox"/> Highland Park	<input checked="" type="checkbox"/> Huron Township	<input checked="" type="checkbox"/> Inster	<input checked="" type="checkbox"/> Lincoln Park
<input checked="" type="checkbox"/> Livonia	<input checked="" type="checkbox"/> Melvindale	<input checked="" type="checkbox"/> New Boston	<input checked="" type="checkbox"/> Northville	<input checked="" type="checkbox"/> Northville Township
<input checked="" type="checkbox"/> Plymouth	<input checked="" type="checkbox"/> Redford	<input checked="" type="checkbox"/> Redford Township	<input checked="" type="checkbox"/> River Rouge	<input checked="" type="checkbox"/> Riverview
<input checked="" type="checkbox"/> Rockwood	<input checked="" type="checkbox"/> Romulus	<input checked="" type="checkbox"/> Roush	<input checked="" type="checkbox"/> Southgate	<input checked="" type="checkbox"/> Sunstar Township
<input checked="" type="checkbox"/> Taylor	<input checked="" type="checkbox"/> Trenton	<input checked="" type="checkbox"/> Van Buren Township	<input checked="" type="checkbox"/> Walled Lake	<input checked="" type="checkbox"/> Wayne
<input checked="" type="checkbox"/> Westland	<input checked="" type="checkbox"/> Willow	<input checked="" type="checkbox"/> Woodhaven	<input checked="" type="checkbox"/> Wyandotte	

Michigan

Your coverage area can be viewed and edited within the “My Profile” tab:

- 1 Review your current coverage area to make sure it is up to date.
- 2 Click the “Edit” button to make changes.
- 3 Add additional coverage at the top of the edit page.
- 4 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

1 Agency Information

Broker:	Wendy TestAgent	2140 Cicotte
Relo Director:	Wendy TestAgent	Lincoln Park, MI 48146
Main Contact:	Wendy TestAgent	(313) 845-1321
License Number:	763675635	
Expiration Date:	12/31/2020	

2 Agency Actions

- Lead Flow
- Active: 13
- Closed: 1
- Edit Agency Information

3 Add Agent / Add/Edit Service Area

4 Agents

Agent Name	Eligible To Receive Referrals
Andrea Testagent	Active 0 Closed 0
Robert Testagent	Active 0 Closed 0
Wendy TestAgent	Active 7 Closed 1

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.

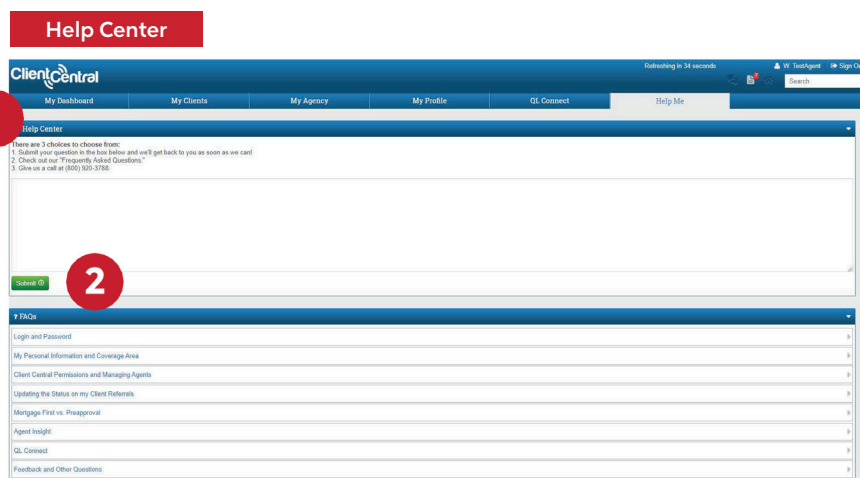


To update the agency's information, click the "Edit Agency Information" under the "My Agency" tab

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

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's why we created the "Help Me" page – you have access to our FAQs and an easy way to submit feedback or questions.



Four ways to get help:

- 1 Call us during business hours.
- 2 Submit your question or feedback directly in the Help Center.



You'll find all the help you need on the "Help Me" tab.

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