

An Introduction To



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

January 14, 2025

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.

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Client Update Center				•	
		44 CLIENTS NE	EED UPDATING		
nt Name Abdul Mushari	Updated	Status	Agent Stacy Ahmad	Lindate O	v these three easy step ep all your clients ed!
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🖆 Abdul Mu	shari				
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O Client is NOT Mo	iving Forward			5	longer be listed in the
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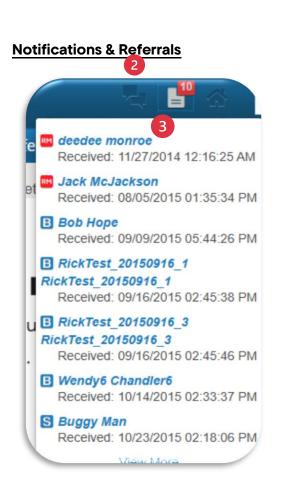
You'll find The Client Update Center under the "My Dashboard" tab.

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 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:



When receiving a new referral, a number will appear next to the new CPRA icon within the notification



Click on the icon to see a list of the referrals you have waiting for you.

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.







Accepting and assigning a new client referral:

A confirmation message will appear that outlines our legal disclaimer and referral fee for this transaction.

1

- 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-todate 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.

Dashboard My	Clients My Profile	Refer To Rocket Help Me	Morgage Buyer = Rocket Pro TPO : = Power Pack	list in	an view a full client the "My Clients" tab:
2 (Rocket Mortgage Appr	Want a fas Refer for t	et Mortgage® is the next st, seamless and trusted process for you and yo he best possible mortgage experience.		1	Search for a specific client by typing the first few letters of their first or last name in the search bar and all
New Referrals - 2 Total			•	2	On the "My Clients"
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Timothy Smi	12/30/2024	Please confirm you are moving forward with them.			be listed in order of
House Hunting/Selling - 3 To	otal				their transportion
Client Name	Updated	Status	Agent		their transaction
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📾 Idrees Mu 🔜 3	12/15/2024	The client is active and highly motivated	Update		
B ShaQuita Wat	12/20/2024	Not moving forward	Update	3	You can access the
Offer Made - 0 Total					olionto' dotoil no no bu
Client Name Closing Pending - 0 Total	Updated	Status	Agent		clients' detail page by clicket on their name.
Client Name	Updated	Status	Agent		
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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.

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

Deshboard	My Clients	My Profile	Refer To Rocket	Help Me		
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Client Details

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(855) 87	9-28 I@rockethome	as.com				Date: 11/22/2024 Status: No. client has n Additional Details: Wil	Added By: Julie Goli ot responded yet. I continue to reach out to cl
						Date: 11/19/2024 Status: No. client has r Additional Details: Wil	Added By: Julie Goli of responded yet. I continue to reach out to C
S Links : Rackat He	ames SM				Questions or Feer Call: (800) 920-3768 Email: help@trocketh		

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.
- Their Rocket Team including the banker and loan processor and Licensed Home Coordinator.
- 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.

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.

Your profile page includes:

Edit Profile

ClientCentral	Autor	hing in SS seconds 🔹 🛔 M. Ds Pasquale – 🐲 Sig Second	1 Your personal information.
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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.

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.

Your coverage area can be

My Profile

Help M	e				viewed and edited within the "my Profile" tab:
Personal	Actions			1	Click "Edit Coverage to make changes.
Lead Flow Edit Perso	Lead Flow Statu	is: On			Review your current coverage area to make sure it is up to date.
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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.

Your Agency page includes: My Profile/Agency Service Area Tab 1 Your agency information. 1 ent Central My Agency Your agency actions and the ability to 2 edit your information or add an **Re/Max Test Agency** Eligible (6) Not Active (2) agency. Add Agent Add/Edit Service Area Relo Wailea, HI 96753 (734) 805-5465 Has A Client (6) Stacy Ahmad Director: Stacy Ahmad Main Contact: Mike Di Pasq License 3 Add agents and add/edit the service cense mber: 165225522 ration Date: 06/12/2013 area. 4 Agent Firefox 😐 Active 0 Closing Pending 0 On Hold 0 Closed 0 Refe to RM 0 A list of your agents based on their bibi sammor 😐 status. Active 0 Closing Pending 0 On Hold 0 Closed 0 Refer Davey Tapp Active 11 Closing Pending 0 On Hold 0 Closed 13 Referred to RM 0 Fridge Appliances 😐 Active 0 Closing Pending 0 On Hold 0 Closed 0 Ref



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

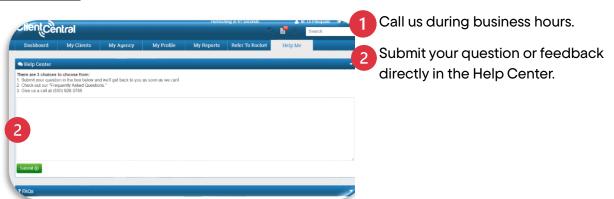
These items will only show up if you are designated as a Broker, Relocation Director, or the Main Contact for your agency.

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 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:





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.