



# INTRODUCTION TO BROKERBAY® COURSE HANDBOOK

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INTRODUCTION ( 5-10 min )

MODULE 1

Introduction to BrokerBay® ( 1 hour )

MODULE 2

Introduction to BrokerBay® Mobile App ( 25 min )

ADDITIONAL INFORMATION

BrokerBay® - [Knowledge Articles](#)

BrokerBay® - [How to Book A Showing](#)

BrokerBay® - [Help & Support](#)

[Training Videos](#)

NOTES



FOCUSED ON OUR

**VISION**

To be the resource of choice for REALTOR® members and their communities.

PURSUING OUR

**MISSION**

To enhance REALTOR® member professionalism by providing education, tools and advocacy to support them in serving the community.

UPHOLDING OUR

**VALUES**

- Member-Centric
- Thought-Leader
- Community-Minded
- Professionalism
- Integrity

# INTRODUCTION TO BROKERBAY®

## Purpose

Members and Brokerage Staff to be introduced to BrokerBay® and learn basic hands-on information on how to use the platform.

## Duration

1.5 hours

## Course Goals

- Provide hands-on information session to support Members' and Brokerage Staff's onboarding and use of BrokerBay®
- Demonstrate set up of BrokerBay® on Members' devices (Laptop, Desktop, Tablet and Phone)

# MODULE 1 (1 HOUR)

## Introduction to BrokerBay®

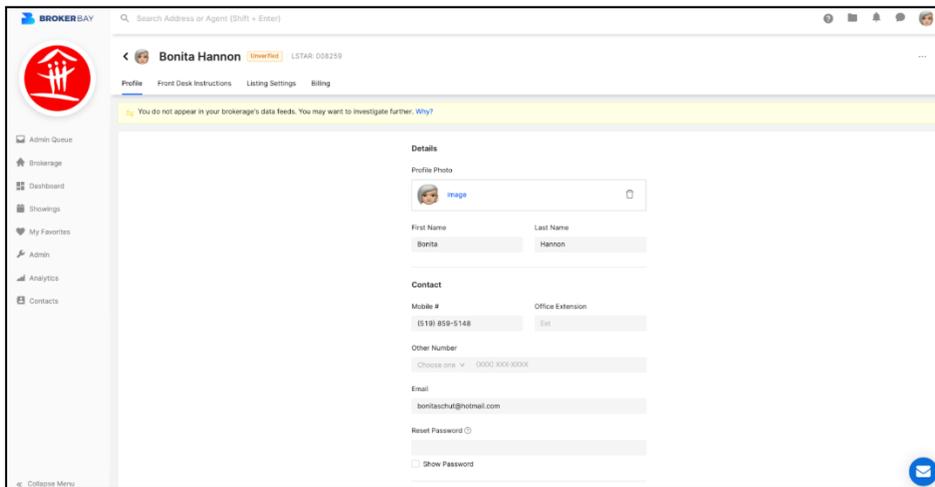
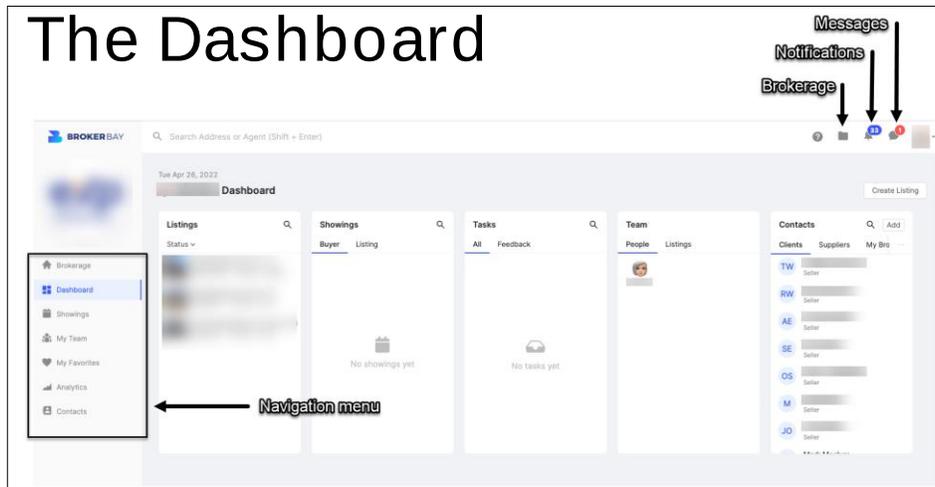
1. How to set-up a Profile
2. How to complete the Showing Configuration
3. How to Message Agents (regarding offers)
4. How to use Offer Registration (and how to set up)
5. How to send a Message (text)
6. How to manually add a Showing (why its important to do it)

NOTES



# HOW TO SET-UP PROFILE

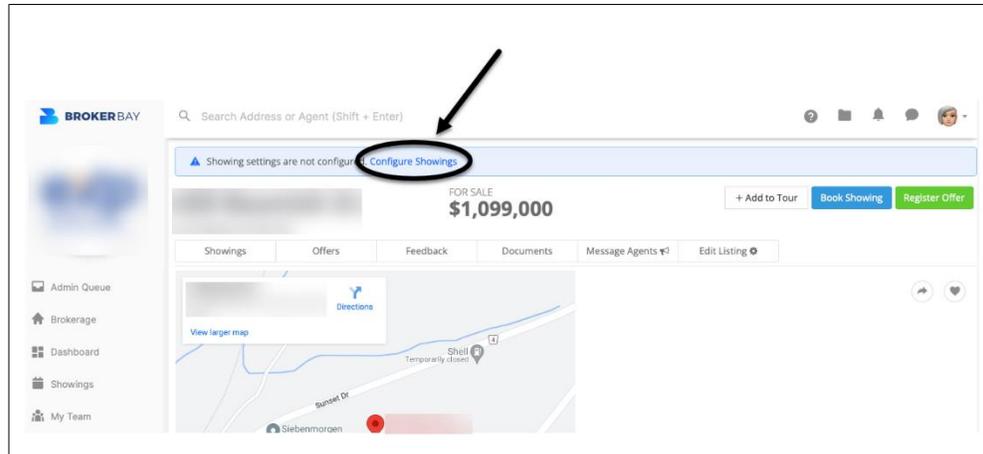
NOTES



# HOW TO COMPLETE THE SHOWING CONFIGURATION

## The Dashboard of a Listing

1. Configure your showings (formerly Listing Worksheet)



NOTES

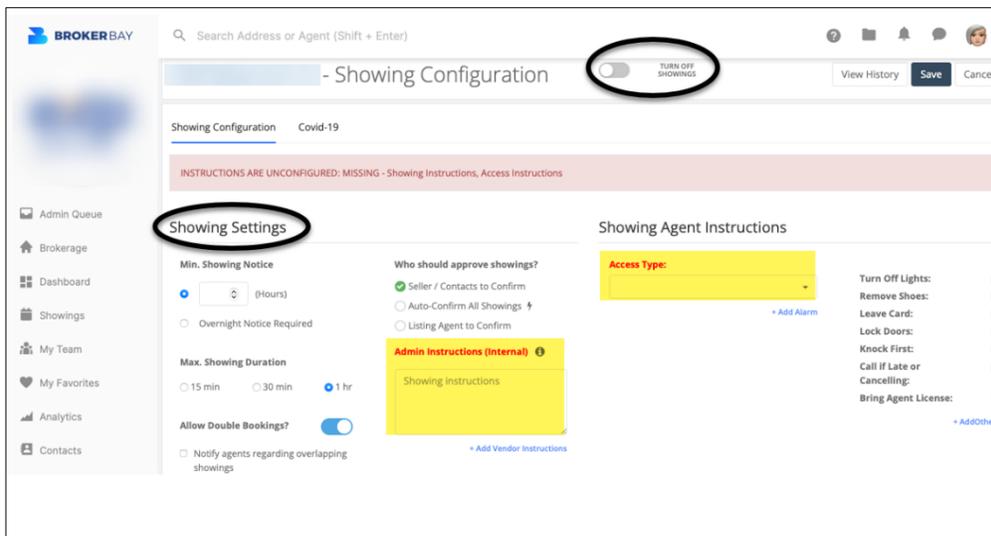


# HOW TO COMPLETE THE SHOWING CONFIGURATION

## Showing Configurations & Showing Settings

1. Turn off showings if needed
2. Example: offer received but no deposit cheque
3. Mandatory fields are highlighted in yellow

NOTES

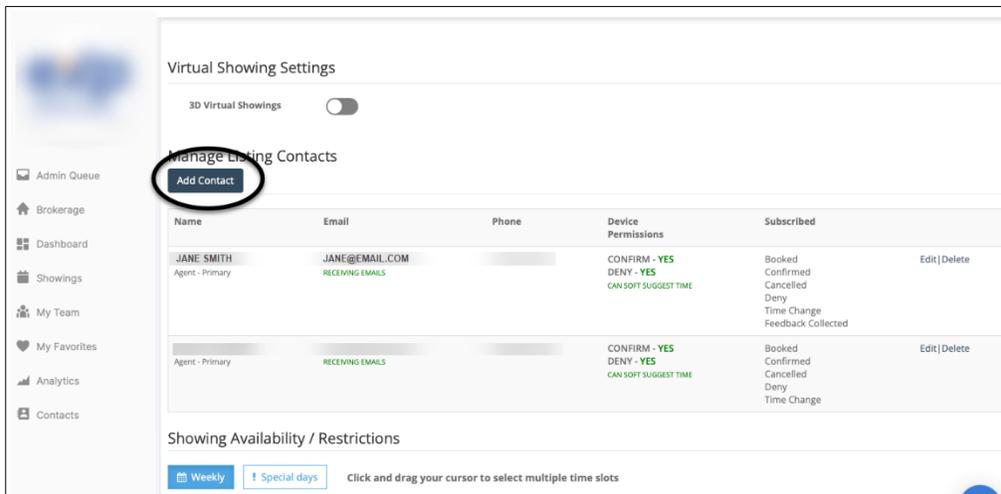


# HOW TO COMPLETE THE SHOWING CONFIGURATION

## NOTES

### Adding Seller to confirm their own showings

1. Add contacts to confirm their own showings and set up Agent preferences for showing requests.



# HOW TO COMPLETE THE SHOWING CONFIGURATION

## NOTES

Adding Seller to confirm their own showings

1. Simply click and drag to select all the time slots that apply.
2. You also have the option to select just one entire day for restrictions.

Showing Availability / Restrictions

Week Special days Click and drag your cursor to select multiple time slots

Custom Selector

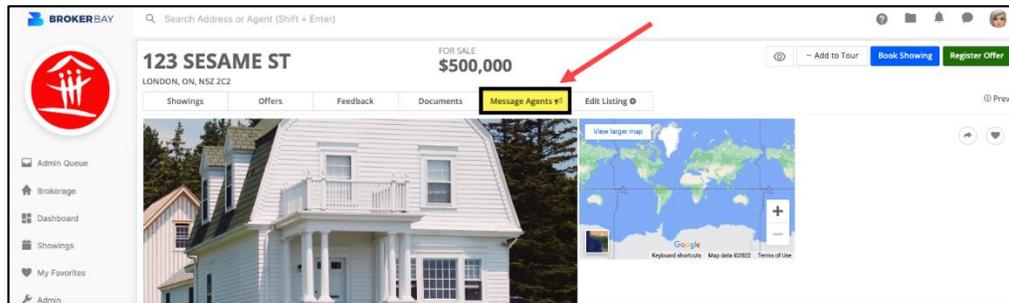
- Available / Restricted
- Auto-Confirm

	MON	TUE	WED	THU	FRI	SAT	SUN
7:00 am	Available						
7:30 am	Available						
8:00 am	Available						
8:30 am	Available						
9:00 am	Available						
9:30 am	Available						
10:00 am	Available						
10:30 am	Available						
11:00 am	Available						
11:30 am	Available						

# HOW TO MESSAGE AGENTS

## Messaging Agents

1. Click on the Listing
2. Click on the Tab – Message Agent



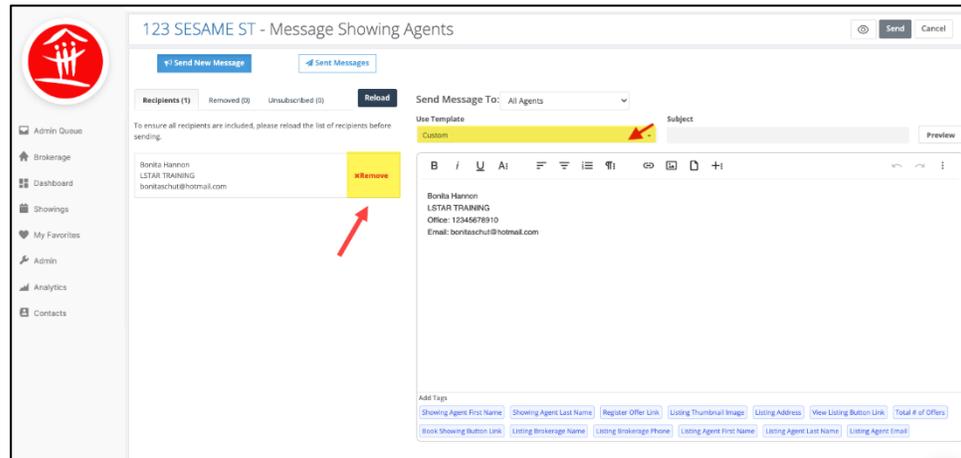
NOTES



# HOW TO MESSAGE AGENTS

## Messaging Agents

3. The Message Showing Agents window will open.



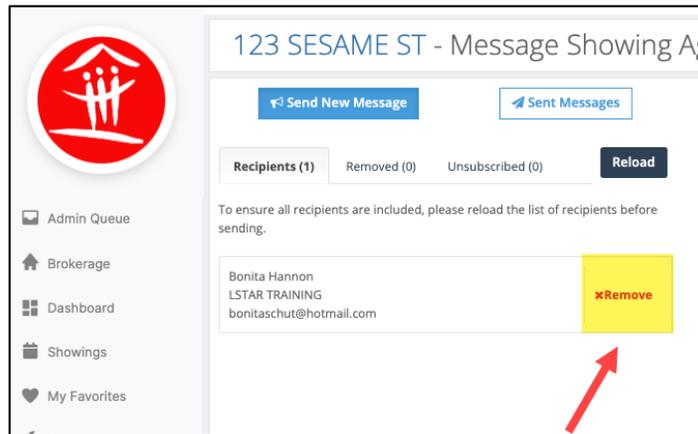
NOTES



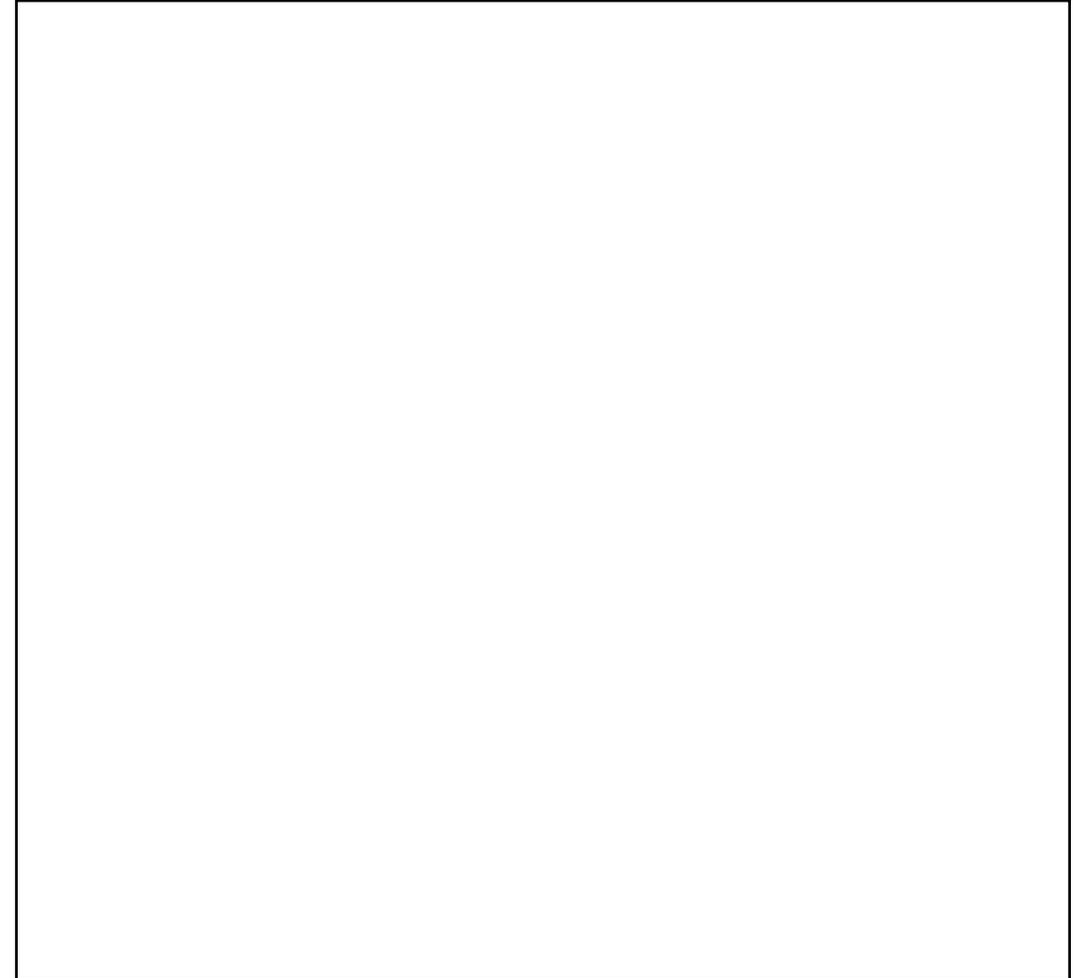
# HOW TO MESSAGE AGENTS

## Messaging Agents

4. Remove any Agents that you do not want receiving this message.
5. You cannot add Agent's emails, which makes it even more important that you manually add showing for those that cannot/will not in the system.



## NOTES



# HOW TO MESSAGE AGENTS

## Messaging Agents

6. Choose which template you want to use.
7. You can create custom templates under your profile.

Agents Send Cancel

Send Message To: All Agents

Use Template: Custom Preview

Subject

Bonita Hannon  
LSTAR TRAINING  
Office: 12345678910  
Email: bonitaschut@hotmail.com

Add Tags

Showing Agent First Name Showing Agent Last Name Register Offer Link Listing Thumbnail Image Listing Address View Listing Button Link Total # of Offers

Book Showing Button Link Listing Brokerage Name Listing Brokerage Phone Listing Agent First Name Listing Agent Last Name Listing Agent Email

NOTES

# HOW TO USE OFFER REGISTRATION AND SET IT UP

## Offer Registration Settings

1. Click on offer settings prior to receiving offers.



NOTES



# HOW TO USE OFFER REGISTRATION AND SET IT UP

## NOTES

## Offer Registration Settings

2. You can also view the offer notification template when in this section. Cooperating Brokers receiving the messages can opt-out of these notifications themselves. No more scrambling to delete emails of Agents wanting to no longer receive notifications.

## Set your Offer Configuration

The screenshot displays the 'Offer Settings' page in the BROKERBAY system. The page title is '- Offer' and it includes a search bar at the top. The 'Allow Offer Registrations' toggle is turned on. The 'Offer Instructions' section includes a dropdown for 'Offers Accepted' set to 'Anytime', a 'Requested Min Irrevocable (Hours)' field set to '12', and a text area for 'Other Instructions for Showing Agents' containing 'PLEASE ALLOW 12 HOURS IRREVOCABLE ON ALL OFFERS'. The 'Offer Submission Methods' section has checkboxes for 'In Person', 'Email' (checked), and 'Other', with corresponding location fields for 'WAYNE@' and 'Special Ir'. The 'Online Registration Settings' section has a toggle for 'Allow showing agents to register their own offers' (checked) and a toggle for 'Make Offer Doc attachment mandatory when registering online' (unchecked).

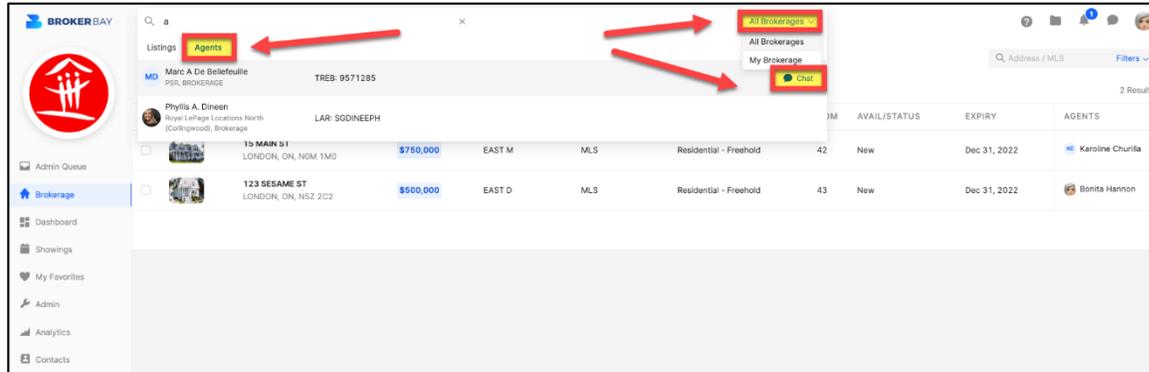


# HOW TO SEND A MESSAGE (TEXT)

## NOTES

### Messaging Agents (Text)

1. Sending a message to an Agent(s) outside of your brokerage, use the search bar to find their name.

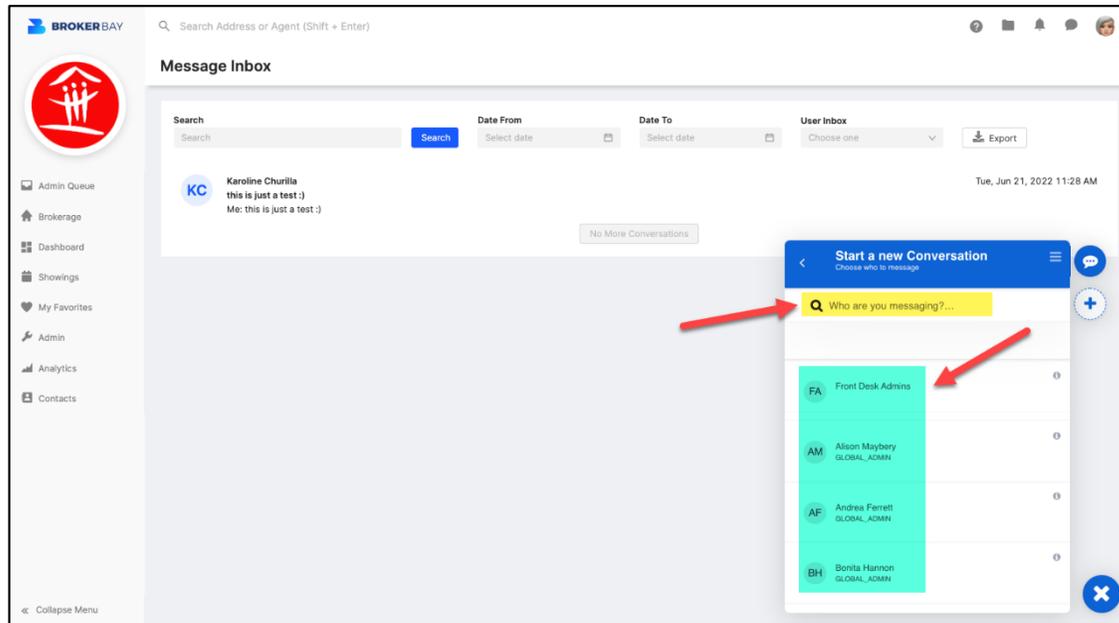


# HOW TO SEND A MESSAGE (TEXT)

NOTES

## Messaging Agents (Text)

2. You can message multiple users within your brokerage.
3. Click from your list to select or add through search.



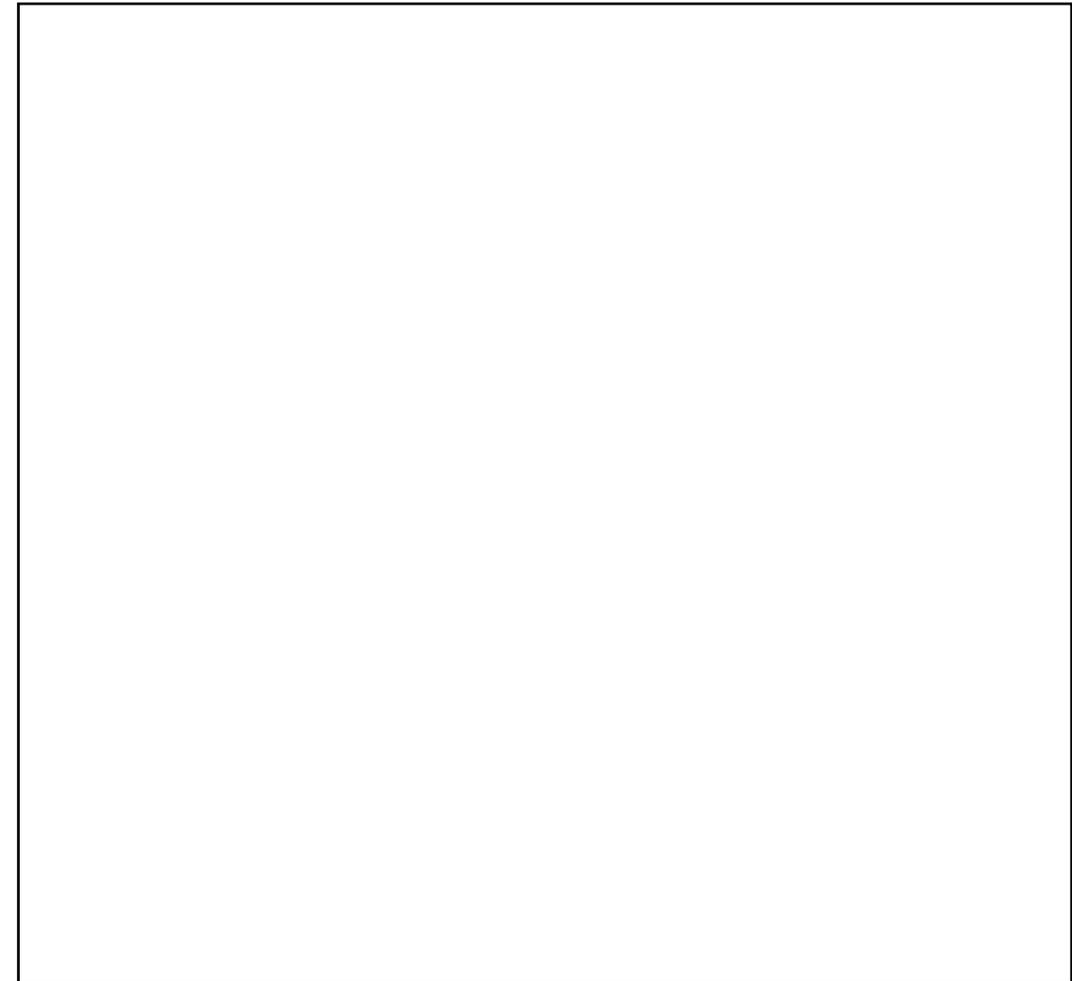
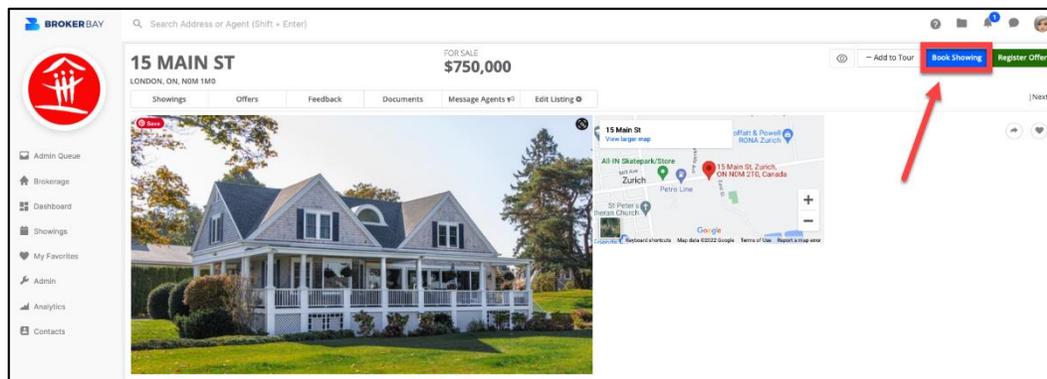
# HOW TO MANUALLY ADD A SHOWING

NOTES

Manually Add a Showing

Choose the listing you want to show

Select – Book Showing



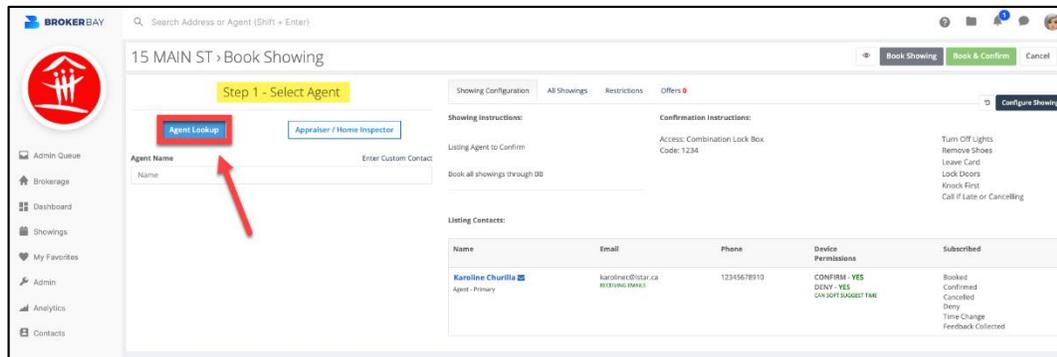
# HOW TO MANUALLY ADD A SHOWING

NOTES

## Step #1

Search for the Agent's name

All Agents in Ontario will be on the list



# HOW TO MANUALLY ADD A SHOWING

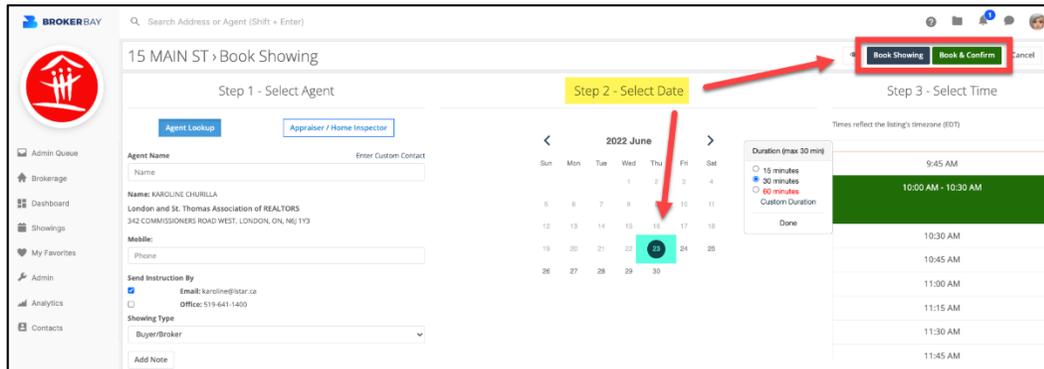
## NOTES

### Step #2

Select a date

Then either Book Showing to send to your Sellers to confirm; or

Book & Confirm if you have already confirmed with the Sellers

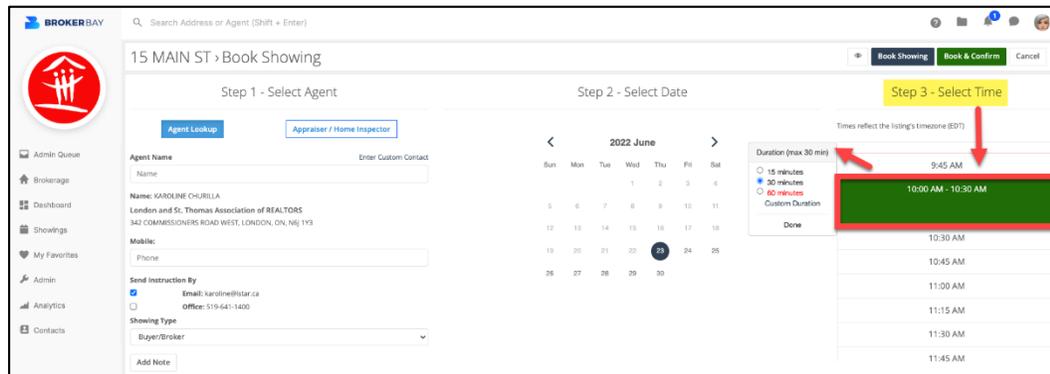


# HOW TO MANUALLY ADD A SHOWING

NOTES

## Step #3

Select Time and add details



# MODULE 2 (25 MIN)

NOTES

## Introduction to BrokerBay® Mobile App

### Learning Outcomes:

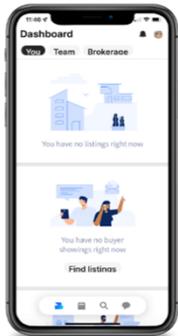
1. How to message an Agent (text-type) for a listing
2. How to add Showing Configurations and Offer Settings
3. How to Register an Offer or Book a Showing
4. How to Message Agents to send out a notification about offers
5. On the dashboard, learn to use the tools at the bottom to send a text-type message to an agent (not tied to a listing), search for a listing, and check your showings

# BROKERBAY® MOBILE APP

## NOTES

### Overview

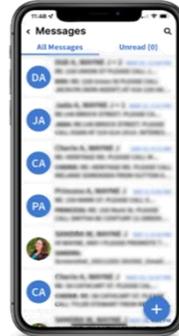
Dashboard



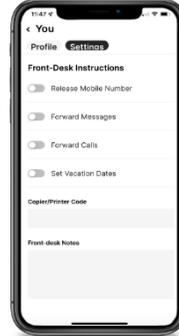
Agent Profile



Agent Message Centre



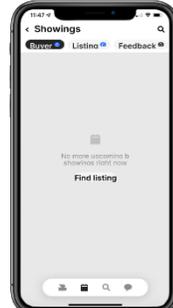
Settings and Front Desk instructions



Search for listings or register an offer



See your scheduled showings or those booked on your listings



Board or Brokerage notifications



# HOW TO BOOK A SHOWING IN MATRIX™

NOTES

Select the Showing Icon on Matrix™

# Beds Tot	# Baths Tot	AG	BG	DOM			
(3+1)	(2+0)	1,026		3			
(3+0)	(1+1)	945	900	3			
(3+0)	(1+1)	2,030	700	3			
(3+0)	(2+1)	1,877	360	4			
(3+0)	(1+0)	1,104		4			

Accept the COVID Form – No Showing without accepting. No need to use a Brokerage Form separately.



**COVID-19 SAFETY PRECAUTIONS:**

By pressing "I AGREE" you confirm, to the best of your knowledge, that no one attending this showing:

1. Is displaying cold-like symptoms including fever, dry cough, shortness of breath, or difficulty breathing in the last 7 days.
2. Has come into contact with anyone with a confirmed or presumptive COVID-19 test in the last 7 days.

**You further agree that:**

3. You and your clients understand the health risks that may be associated with visiting a property in person and further acknowledge that Exp Realty and/or its representatives cannot guarantee or accept any responsibility or liability from possible exposure to the virus.
4. You and your clients will NOT use the washroom facilities during your viewing.
5. You will wear a mask and sanitize/wash your hands prior to entering the home and touching the lockbox.



# HOW TO BOOK A SHOWING IN MATRIX™

NOTES

## Step #1 – Your Profile

Choose how you want to be notified

123 Sesame St. > Book Showing

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**Step 1** Your Profile

Name: Jane Smith  
abc Realty Brokerage

Mobile:  
Phone

Send Instruction By  
 Email: jane@email.com  
 Office: 800-555-5555

Showing Type  
Buyer/Broker

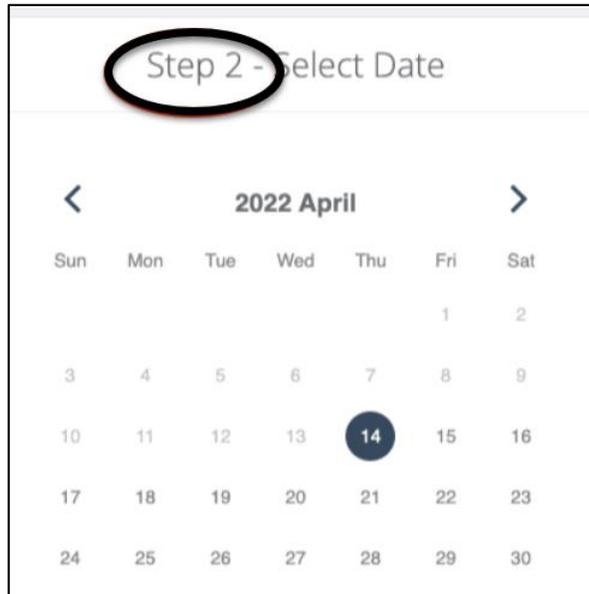
Add Note

Empty box for notes.

# HOW TO BOOK A SHOWING IN MATRIX™

## Step #2 – Select Date

Choose a date



NOTES

A large, empty rectangular box intended for taking notes during the booking process.

# HOW TO BOOK A SHOWING IN MATRIX™

NOTES

## Step #3 – Select a Time

Choose a time and then Book Showing

Book Showing

Notify me regarding registered offers

Step 3 Select Time

Times reflect the listing's timezone (EDT)

12:15 PM
12:30 PM
12:45 PM
1:00 PM
1:15 PM
1:30 PM
1:45 PM
2:00 PM
2:15 PM

# ADDITIONAL INFORMATION

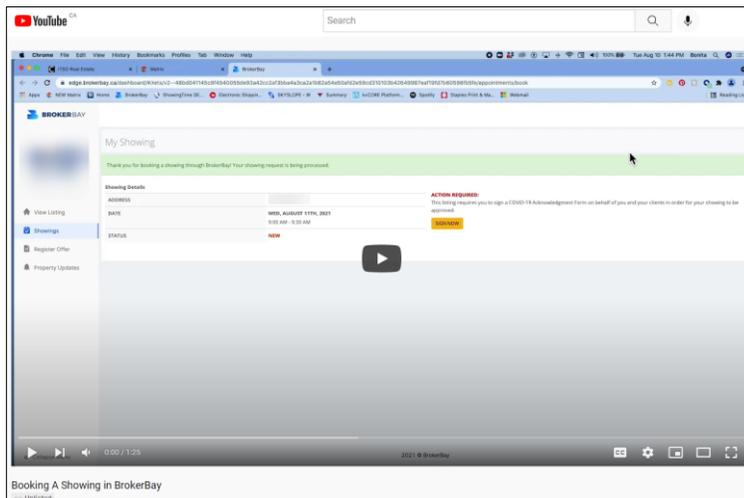
## BrokerBay® - Video

### How to Book a Showing (As A Buyer Agent)

View how to schedule a showing with BrokerBay® select link below  
[Booking a Showing in BrokerBay® - YouTube](#)



Selecting the **above link** will bring you to the YouTube video site:



## NOTES

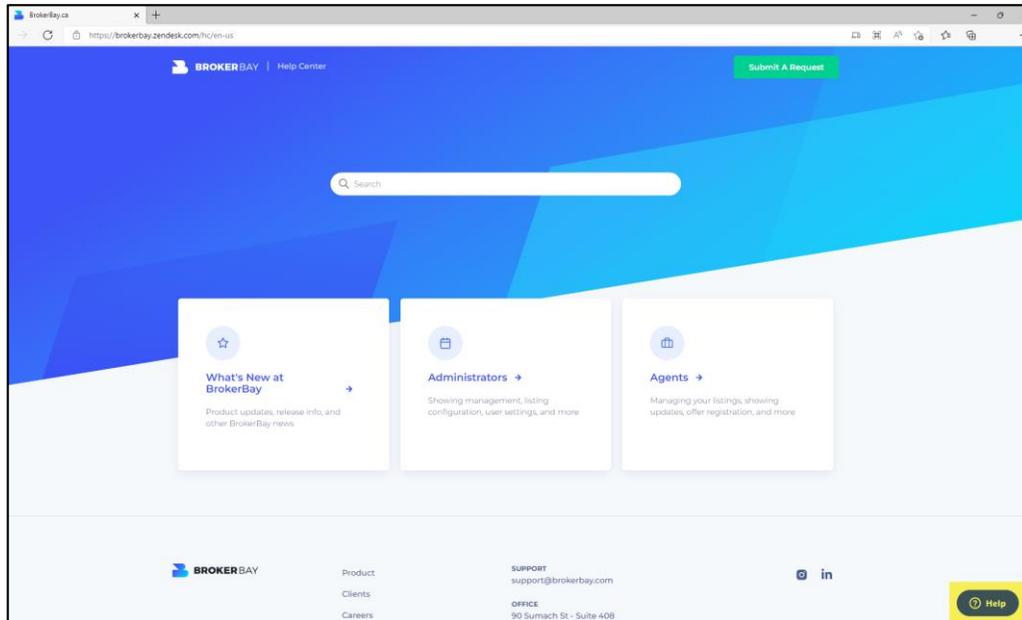


# ADDITIONAL INFORMATION

## BrokerBay® - Help & Support

Go to: <https://brokerbay.zendesk.com/hc/en-us>

Locate the  button located at the bottom right of the screen



## NOTES



# ADDITIONAL INFORMATION

## TRAINING – Video Links

### LSTAR

[How to Setting up your Profile/Account in BrokerBay®](#)

[Showing Configuration in BrokerBay®](#)

[Setting up a Showing in BrokerBay®](#)

[Offer Registration in BrokerBay®\(how to use and to set up\)](#)

[Navigating Through the BrokerBay® Mobile App](#)

[Adding a Team in BrokerBay®](#)

# ADDITIONAL INFORMATION

## TRAINING – Video Links

BrokerBay®

[Admin training](#) – video link

[Agent training](#) – video link

BrokerBay® - [Mobile App Guide](#)

BrokerBay® - [How to Set Up Teams](#)

How to complete the Showing Configuration

[How do I configure offer instructions for my listing? – BrokerBay.ca \(zendesk.com\)](#)

How to message Agents (regarding offers)

[How Do I Message All Agents Who Have Shown The Property? – BrokerBay.ca \(zendesk.com\)](#)

How to send a Message (text)

[How Do I Send A Message? – BrokerBay.ca \(zendesk.com\)](#)

How to manually add a showing (why its important to do it)

[How To Add Showing Instructions – BrokerBay.ca \(zendesk.com\)](#)