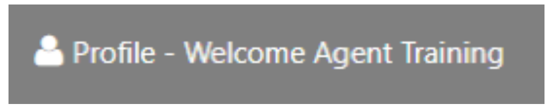
GiMMiWEB
BY NEXONE

AGENT TRAINING GUIDE

You have 2 ways of connecting to your GimmiWeb Account. You can either click on Centris.ca and enter your Centris credentials or on GimmiWeb directly with the credentials provided to you by your office (Office ID, username and password).

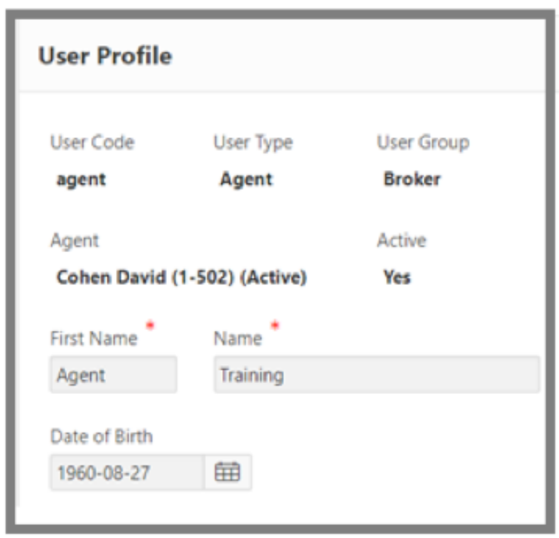
Connecting with your Centris credentials is only available for Quebec users.
If it's your first time connecting to GimmiWeb, you need to set up your profile information. Your profile can be found at the top right corner.



1. Profile

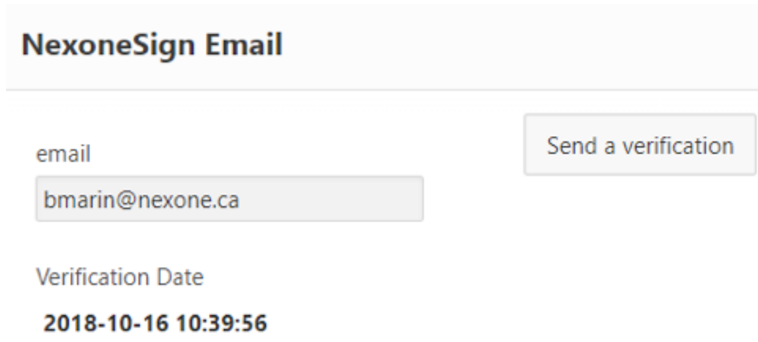
The ***User Profile*** is all your agent information. The following areas are only modifiable by your office: User Code, User Type, User Group, Agent, Active. If any of this information is incorrect, please contact your office.

The other information, if incorrect can be modified by you.

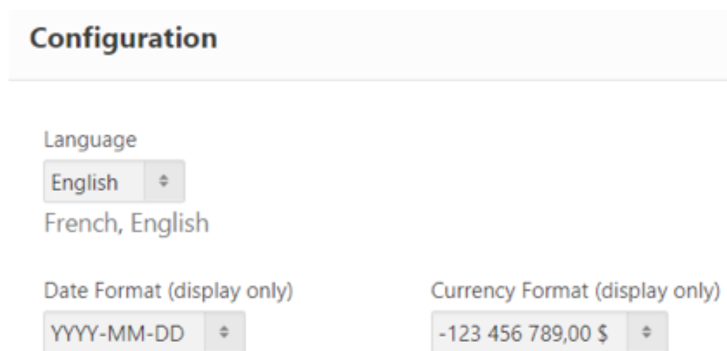


The ***NexOneSign Email*** needs to be verified in order to have access to the e-signature. Under email enter the email address you would be using for the e-signature and then click send verification.

After clicking send verification, you will receive an email asking you to click on the link to Verify the email. You then should receive a message saying you email has been verified and the verification date will automatically be entered in GimmiWeb.



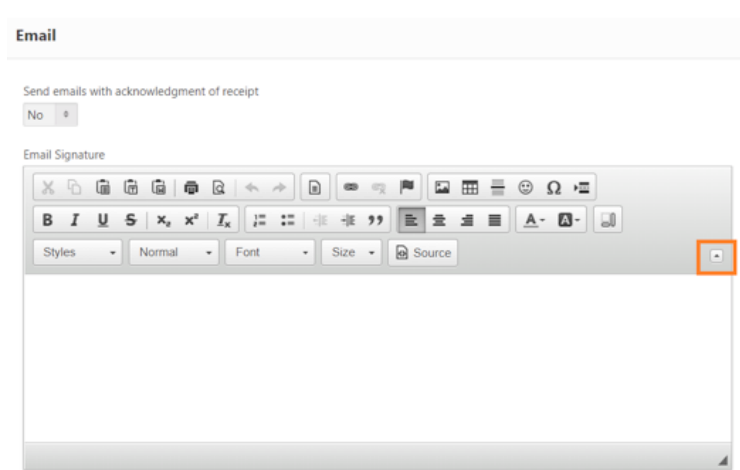
The ***Configuration*** is to set the language you would like GimmiWeb to be in. Select from the drop-down menu between English or French.



You can also select what date format and what currency format you are most familiar with and would like to be displayed when using GimmiWeb.

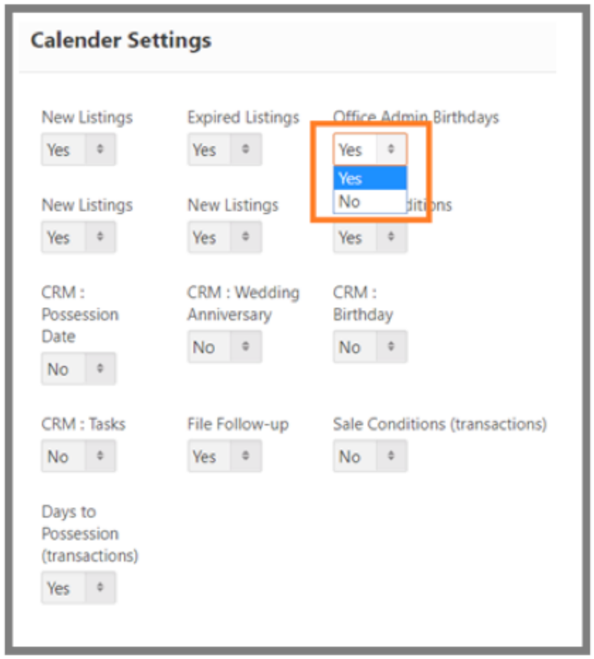
The ***Email*** option is to add your signature to emails you send out through the system. In order to see all the options for creating your own email signature, click on the arrow pointing downwards to allow the menu of options drop down.

If you would like to skip a line, make sure to select Shift + Enter. As only clicking Enter, will skip a paragraph and not only 1 line.



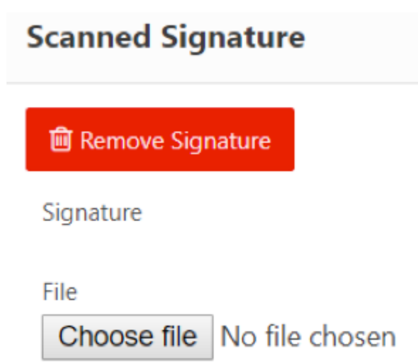
The ***Calendar Settings*** is to allow you to choose what shows up on your calendar and which ones send out notifications. If you would like to remove a reminder from your calendar, click on the drop-down menu, then select no.

Your GimmiWeb Calendar can be synched with any phone using google calendar.



The ***Scanned Signature*** is for adding your signature at the bottom of letters you send out to clients. You would need to scan your hand-written signature and then click on Choose File. Upload your scanned signature. The scanned signature will automatically be added the letters your send out.

To remove your scanned signature, click on the red remove signature button.



The ***board Account*** is only for Quebec users as of right now. This is where you can enter your credentials for Centris.ca. For other provinces connecting with your board information will be available soon.

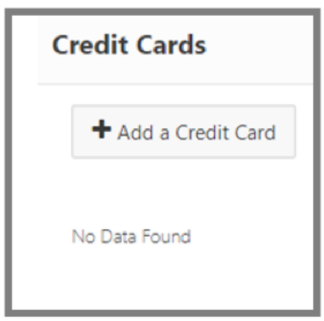
The ***Instanet forms*** is also only for Quebec users who use Instanet forms to fill out their documents. In order to be able to send files from Instanet forms directly to your GimmiWeb account (listing, transaction or NexoneSign) your first need to generate a Security Key and copy paste it to your Instanet Forms account.

In Instanet Forms you need to paste the Security key you copied from GimmiWeb, to do so follow the steps below.

- Go to setting's
- Click on
- Seles seller: NexOneSign
- Enter the Security key copied from GimmiWeb
- Click update

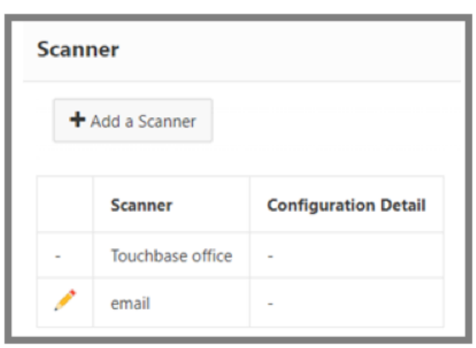
For Additional information on how to send your documents from Instanet Forms to GimmiWeb, please review our training documents named: Sending documents from Instanet forms.

The ***Credit Cards*** section is to add your credit card to your Gimmi account. This information stays personal to you and is only used to pay your monthly fees or brokerage invoices.



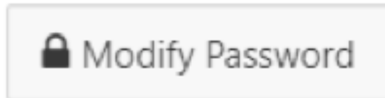
The ***Scanner Information*** need to be set up to be compliant with legislations, enter the names of the possible sources for your documents like scanners brand and model, email, virtual fax, etc.

The Suggested scanner configuration to be entered is: PDF, 300 DPI, Text mode, Black and White. Remember to also configure your scanner accordingly. Also add entries for Email and Virtual fax sources. For those, enter Email or Virtual fax with an ***Unknown*** configuration.



The ***Personal Address, phones and email*** section is for your address at the office or your home address, the phone numbers you would like to have (office, home, cell) and the emails (work, personal).

To modify your password in Gimmi click on Modify Password at the top left corner.



This should bring you to another page where you will need to enter your new password twice and then click save.

Once you are finished adding/editing the information in your profile, click save at the top left corner.

2. Dashboard

The ***Dashboard*** is all the most important shortcuts you will need and is the first page you see when you login to your account. The dash board is found at the top right corner in the orange menu.

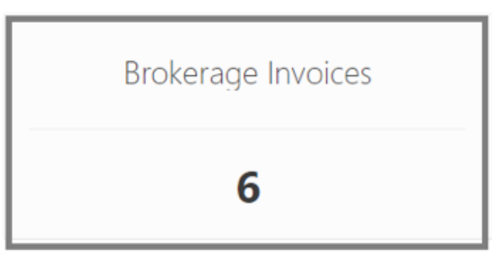
3. Financial Picture

The ***Financial Picture*** is a comparative of your last year income/commission with the current year income/commission.

4. Accounting

The ***Accounting*** is where all your brokerages invoices, account statements, tax reports, etc. are found.

To view your ***brokerage invoices***, click on: brokerage Invoices
This will open a new page where all your brokerage invoices will appear.
To view one of your invoices, select the PDF sign at the far left of the invoice.
The number underneath brokerage invoices, in the number of invoices under this category.

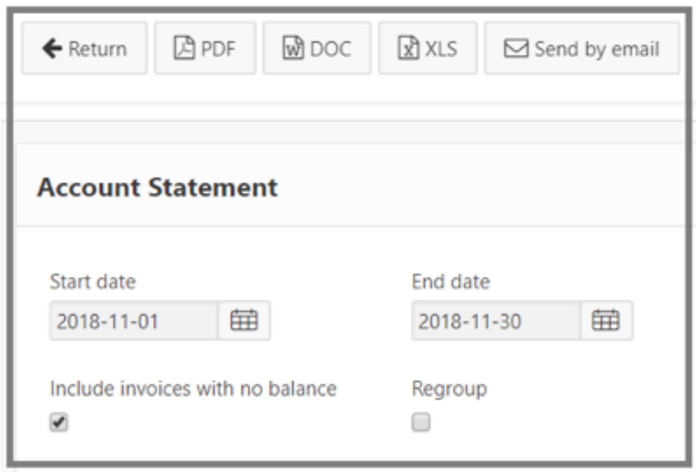


To view your ***Account Statement***, click on: Statement Account.
You will then need to select a start date and end date in order to get your account statement for that period.

Check off include invoices with no balance if you would like to include already paid invoices in your statement.

You can export your statement to a PDF, DOC or EXL by clicking on one of the options at the top.

You can also send your statement by email by clicking the option: send by email.



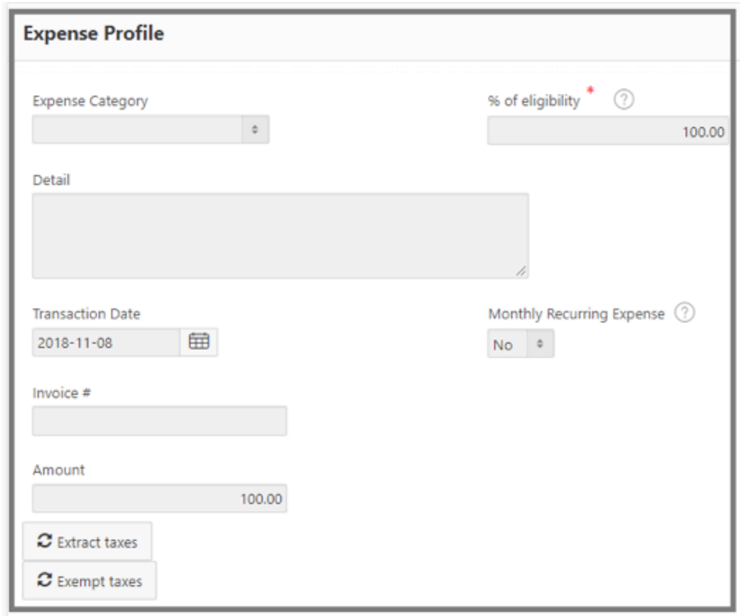
To ***Add an expense***, click on: Add an Expense. After clicking on add an expense it will bring you to the expense profile.

Enter in your Expense Category (ex: Parking, Permit & License Fees, Training Fees). Enter the % of Eligibility, the eligibility percentage is used to indicate the percentage of the expense that is for business purposes.

In the Detail section, enter the detail on the expense. If the Expense is a monthly re-curring expense, select Yes for Monthly recurring expense. Enter the amount of the Expense under Amount.

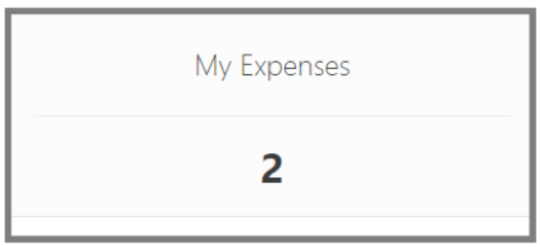
Extract taxes will remove the tax amount from the amount entered above. Only use this option is the amount ***INCLUDES*** the taxes and you would like the separate. Exempt Taxes will remove the calculation of taxes, but you total will include the tax amount. To add a picture/PDF file of your receipt/expense, click on: Choose file

Once you are done adding your expense click save and close at the top.



To view all your expenses, click on ***My Expenses***. This will open another page where you will see a list of your expenses, to edit or view an expense click on the pencil icon to the left of the expense.

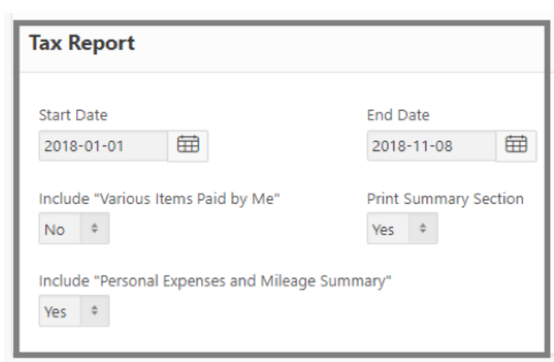
The number under My Expense is the amount of expenses you have in the section.



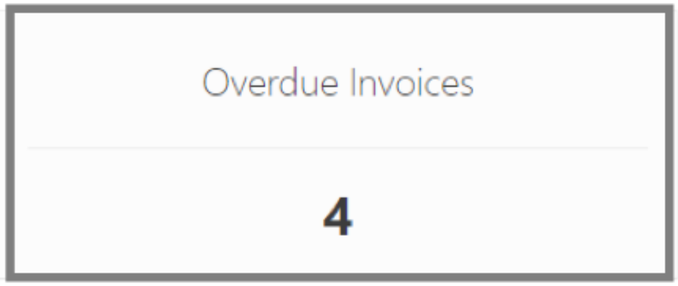
The ***Tax Report*** is where you would go to create your Year end Tax Reports. Enter the start and end date desired.

Include personal expenses and mileage summary is defaulted to yes, if you would like this to be exempt from your tax report, select in the drop-down Menu no.

After adding all the information, select at the top either PDF, DOC or XLS to open your tax report. You can also send your tac report by email by clicking on: send by email.

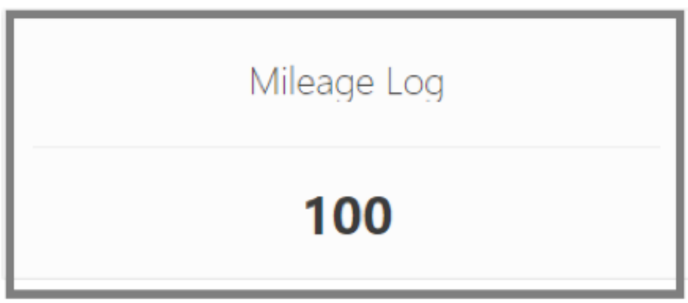


Your ***Overdue invoices*** will be found under overdue invoices. Once you click on your overdue invoices you will see a list of all the invoices that need to be paid as soon as possible.



The ***Mileage Log*** is where you can enter in the mileage's you do for work purposes. To add a new log, click on the add a new period at the top then Enter the year, Month and your mileage at the start of the period and click next. Under Detail, enter the day and the distance of your drive and the motive (reason). After you are done entering all the information, click save and close at the top.

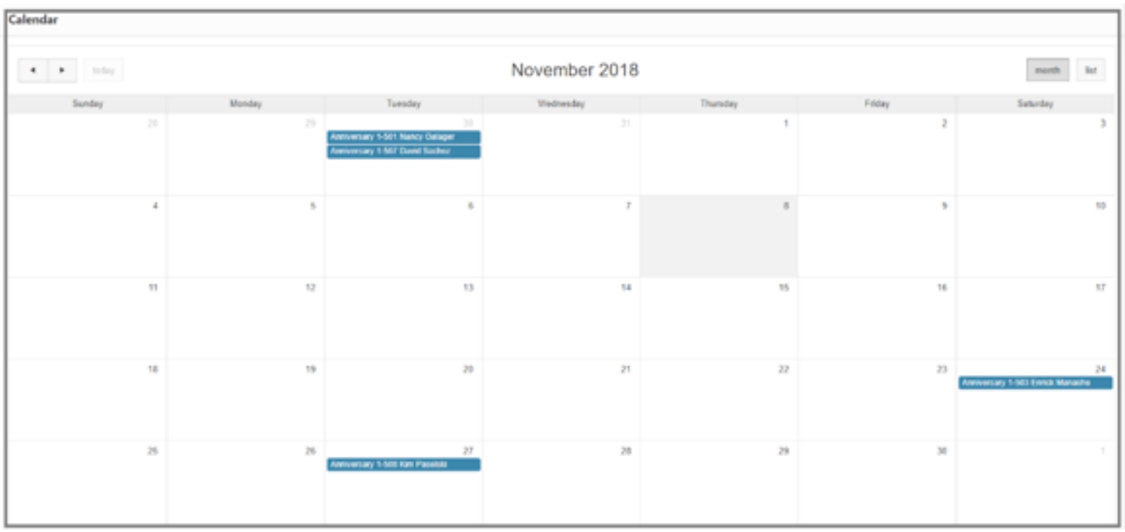
If you are in a hurry, you also have the option: Quick Add. This will allow you to only enter the date, your mileage and the motive.



5. Calendar

The Calendar option, found to the left in the orange menu is where you can see all your upcoming events, sales conditions, new listing/transactions etc. To configure what you would like to have appear in your calendar, go back to profile and click on Calendar, you will then be able to modify the events that appear in your calendar. The GimmiWeb Calendar can sync with any phone that has google calendar.

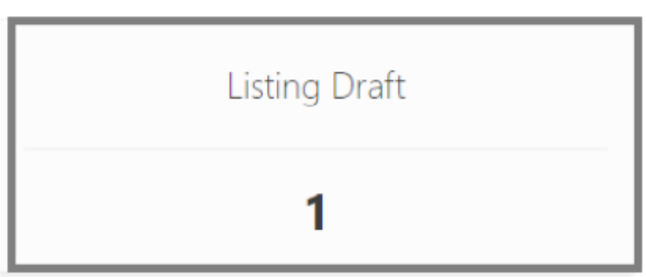
To add an event to your calendar, click on add event at the top.



6. Listings

The listings option is where you will find all your listings. We are connected to your board/Centris and will automatically receive your listings after being added to MLS. Each board has a different time to import their listings with the system. Most board import the listings twice a day (morning and evenings).

To create a new listing that we haven't yet received from MLS, click on the option: ***Listing Draft*** and then click on Add listing. This will allow you to add a new listing while waiting the import of the listings, when you enter a "draft" listing with the correct MLS number, when we receive the MLS import, instead of the system creating a new listing, they will update the "draft" listing with the updated information.



After clicking on add a new listing it should bring you to enter in all the listing information.

Under ***Listing Profile*** enter the MLS # and the listing agreement type. It is important to enter the MLS # as soon as you have it. If you do not have the MLS # when creating the listing, enter it as soon as you have the MLS #.

Under ***Property Address*** enter the address of the listing.

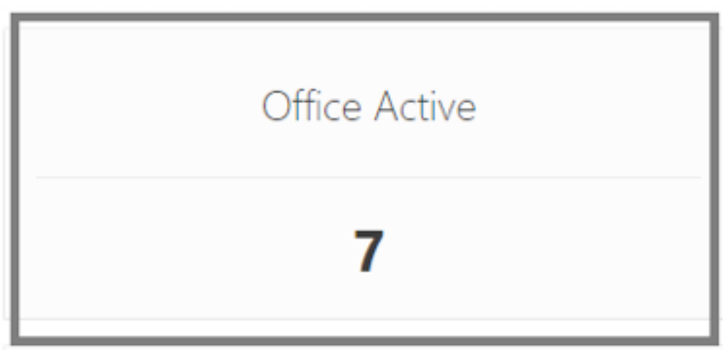
Under ***Clients***, enter the first name, last name and email of the listing clients.

There are no mandatory fields to be filled out in order to save a listing, however, for the import to know which listing is already entered and not create a new listing, it is important to add the MLS # so it matches the listing and update the correct file.

Once we receive the listing from MLS the listing will them be moved to your Active listings.

To view all your ***Active Listings***, click on: Active. A list of all your active listing will appear.

The ***Office Active*** option is for all the listings from your office, this is to favorize internal sales. By clicking on the option Office Active, it will bring you to the list of all active listing within your brokerage. You will not be able to edit these listings or view anything that you wouldn't see on MLS/Centris.



The Sold, Expired and Cancelled option will allow you to view all your sold, expired and cancelled listings. The number below the option, is the number of listings you have within this category.

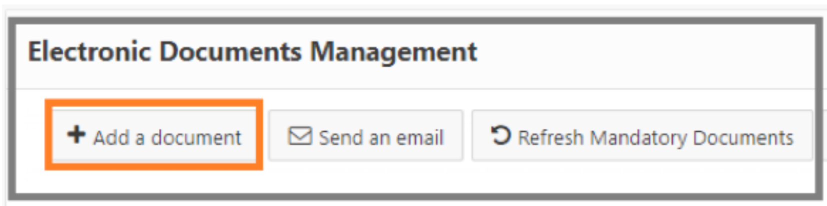
The Inter-Office Exclusives are all the exclusive listings within your office. Clicking on this option will allow you to view all the exclusive listings in your office. This is favorize internal sales.

The documents to Submit option is where you can see all the listings that are missing required documents.

To Submit/Add a document to a listing, click on the option the listing would be under (active, expired, Cancelled, documents to submit, etc.)

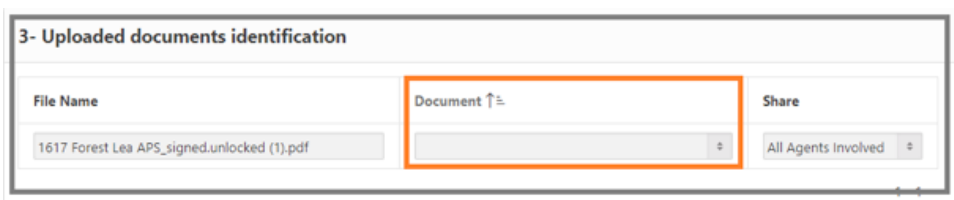
Scroll down to the section: ***Electronic documents management*** or select at the top menu electronic documents management. Under the Electronic Documents Management section, you should see a list of required documents. This required document list is selected by your office, if it needs to be modified, contact your office and they will be able to modify the list of required documents.

Then click on Add a document.



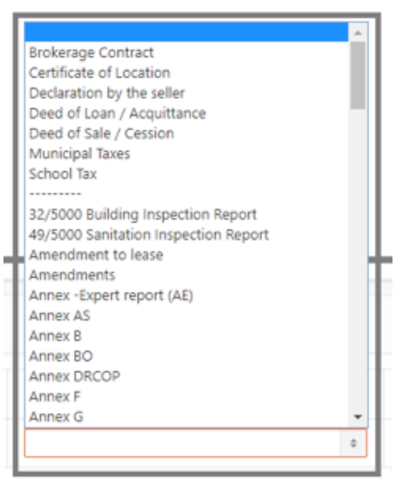
After clicking on add a document, it should bring you to another page. In the large square, drag and drop your files or click in the big square to select a document from your computer.

After the document is loaded, you need to select from the menu of required documents, the name of the document.



In the list of document names to choose from, everything ***above*** the dotted line are the required documents that are mandatory for this file. The document names ***below*** the dotted line are not required for the file, but can be selected if needed.

After you are done adding and selecting the document type, click on save and close at the top left corner.



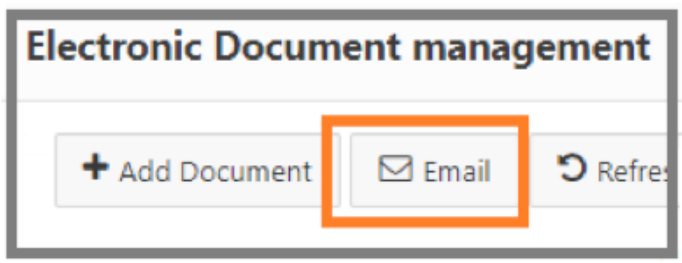
To know the status of the document you added (approved declined, missing) under the electronic document management section of your listing, you should see all the documents you have uploaded with a status. The status colors are:

Red: Missing document
Yellow: Awaiting approval
Green: Approved
Black: Declined

If a document is declined, you will receive a notification letting you know the document was declined and why.

Note: To download all your documents from a file, click on the option ***Create zip file*** under electronic document management.

To send documents by email within a listing, click on the email option within the EDM section of the listing. This will bring you to another page where you will be able to select your documents and recipients. Then click next.



Make sure to click on Send and close to send the email. If you click on Save and close or just save, the ***email will not be sent*** and will be set to pending.

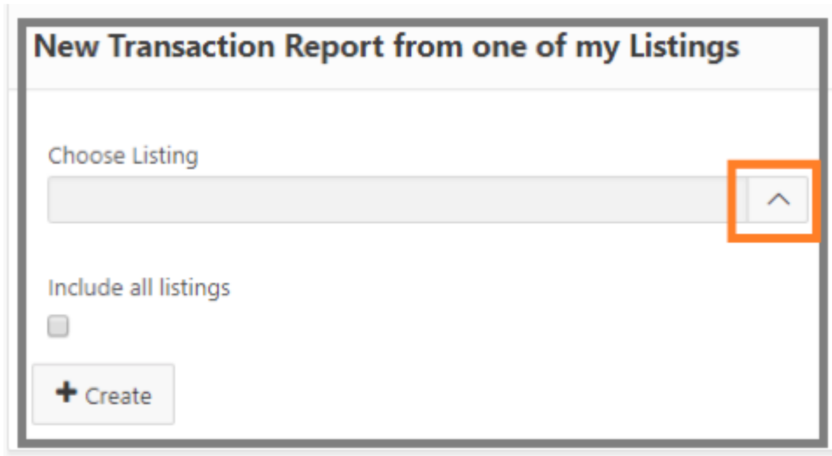
Note: To view if you have any pending emails, click on communications and then emails.

7. Transactions

The transaction option found in the left menu is for your transaction reports. Once you receive an offer on one of your listings or someone else's listing, you will need to create a transaction report.

To create a new transaction report, click on the: ***Create Transaction Report*** option. After clicking this option, it should bring you to a new page with 4 options, this first option is:

New transaction report from one of my listings. This is the option to select when you need to create a transaction report from one of your existing listings. To view all your listing and select the one you would like to create a transaction report from, select the arrow under choose a listing. This will open up a small window for you to select the listing. Once you have your listed selected click on Create.



The second option is: ***New Transaction Report from an MLS Number.*** Since we receive the listings of several boards/Centris you can select what listing you would like to create a transaction report from if the listings Is not yours. To select a listing, enter the MLS number and then click on Create.

The third option is: ***New blank Transaction Report***. If the listing is an exclusive listing or you do not have the MLS # yet, you would need to create a blank transaction report, selecting this option means you need to manually enter all the information and nothing is imported from the listing.

The Fourth option is: ***New Transaction Report from Prospect***. This will pull the information from prospect and create a transaction report from the information pulled. To create a transaction that is pulled from prospect, you need to enter the prospect sale number where indicated and then click on create.

After selecting one of the four options to create a transaction, this should bring you to another page. When the status is in progress, none of fields are required for saving.

If you have created your transaction from one of your listings or from a listing received from the board/Centris, most of the information will automatically be auto-populated within the transaction report.

If you have created a blank transaction, it Is important to at least add the address or MLS number of the file in order to be able to recognize and find this transaction after its been created.

The in-progress Status is only visible to you, if you would like your office to be able to view this transaction report you would need to set to status to: Accepted – Conditional, Accepted – Firm, Refused, Cancelled.

Transaction Statuses:

In Progress: This status is NOT visible by the office staff.

Accepted – Condition: this status is used when there is at least one condition that still needs to be fulfilled.

Accepted – firm: This status is used when all the conditions are met.

Refused: This status may be used if the agreement wasn't accepted.

Cancelled: This status used for when a deal was accepted but has fallen through.

Clicking on the Transaction button in the orange menu also allows you to view several other options. To view all your ***Active Transaction Reports***.

To view the transaction reports, you have documents to submit for, click on documents to submit. This will allow you to view a list of all the transaction reports that are missing documents.

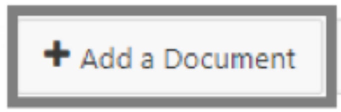
To view the transaction report with conditions to be fulfilled, click on the unfulfilled conditions option. This will allow you to vie a list of all the transaction reports that have conditions.

To submit/add documents to a transaction report, click on the option your transaction report would be under (Active transaction reports, canceled, documents to submit, etc.). Once you see the list of your transaction reports, either click on the pencil to the left of the transaction address or click on the paperclip to view the EDM section of the transaction report.

Scroll down to or select from the top menu: Electronic Document Management. If you have clicked the paperclip, this should have brought you to the EDM section automatically.

Under the Electronic Documents Management section, you should see a list of required documents. This required document list is selected by your office, if it needs to be modified, contact your office and they will be able to modify the list of required documents.

Then click on Add a document.



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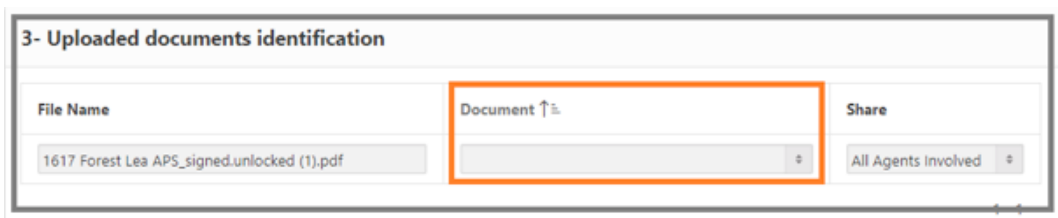

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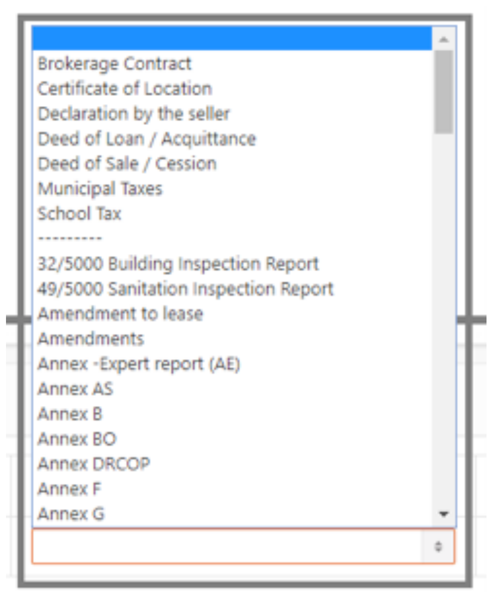

To know the status of the document you added (approved, declined, missing) under the electronic document management section of your transaction report, you should see all the documents you have uploaded with a status. The status colors are:

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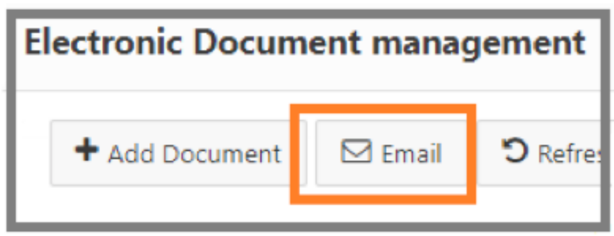
Black: Declined

If a document is declined, you will receive a notification letting you know the document was declined and why.

Note: To download all your documents from a file, click on the option ***Create zip*** file under electronic document management.

To send documents by email within a listing, click on the email option within the EDM section of the listing.



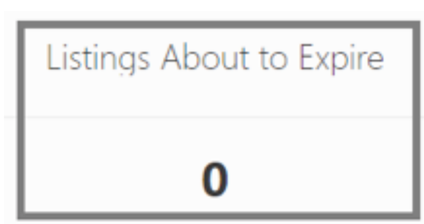
This will bring you to another page where you will be able to select your documents and recipients. Then click next.

Make sure to click on Send and close to send the email. If you click on Save and close or just save, ***the email will not be sent*** and will be set to pending.

Note: To view if you have any pending emails, click on communications and then emails

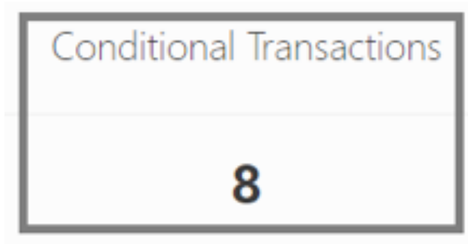
8. Alerts

The alerts section is where you can go verify the files you have received reminders for. You have a few options under the alerts section.

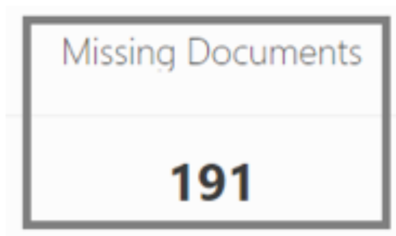


To view your listings that you received a reminder for that are about to expire, click on Listings about to expire.

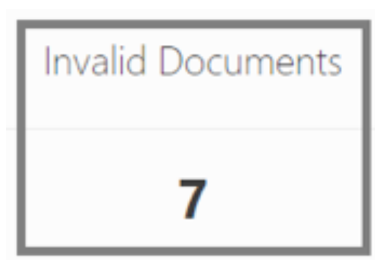
To view your transaction with conditions that you received a reminder for (condition met date is coming up) click on conditional Transaction.



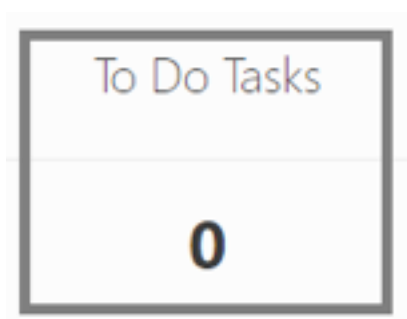
To view your files (listing/transaction reports) that you received reminder for missing documents, click on missing documents.



To view your files that you received notification for document being declined by your office, click on invalid document.



To create a reminder for yourself, click on To Do Tasks and then Add a task, this should bring you to another page where you will need to enter the information of the task you would like to be reminded for.



After selecting any one of these options, it will bring you to a list files that you would have received a notification for. If you would like to modify the file (Add documents, enter information, remove a condition, etc.) you would need to go to your listings or transaction reports as modifying a file is not available under the alerts section.

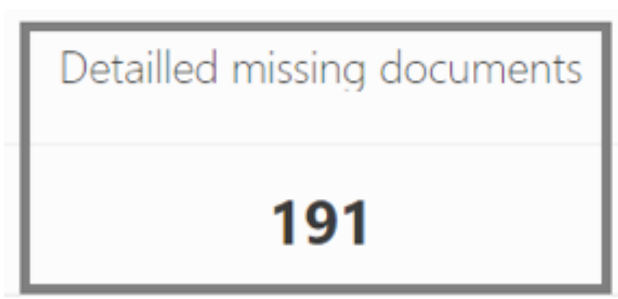
9. EDM

The Electronic Document Management (EDM) section is where you can manage all your documents. There are several options available under the EDM section.

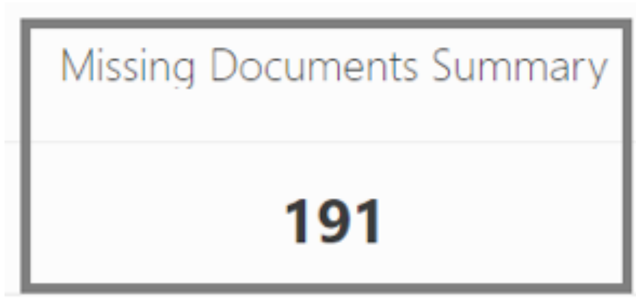
The option ***Documents*** allows you to see what documents where added to what files and their status (Valid, to verify, declined, etc.) and the file name and type. You are unable to view the documents under this option or enter the file, in order to open the documents, you need to note the address of the file then go to your listings or transaction reports.

Listing #	Transaction #	Transaction Report	Address	File Name	Document Type	Sharing	Creation Date	Status
1-201400179	-	-	121 Ch. Mackle, Piedmont	CCV.png	Brokerage Contract	Selling Agents	2017-03-29 15:58:57	Valid
1-201400162	-	-	959 Rue Caouette (GED), Lorraine	CP22222 - Copie.pdf	Counter-Offer	All Agents Involved	2018-03-14 10:44:43	To verify

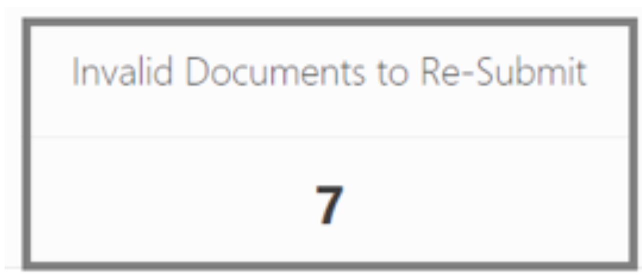
The option ***Detailed missing document***, will give you a list of your files that are missing required documents. In order to upload document to a file that is missing a required document, note the address of the file that is missing a document and go to your listings or transactions reports to upload the document or click on the option upload documents to a listing/Transaction under the EDM section.



The option ***Missing Document Summary*** is similar to the detailed missing documents, however in the missing document summary it will provide you with the number of missing documents and the number of invalid documents per file and will not provide you with the document type, the detailed missing documents provides you the type of document and for what file it is missing for or click on the option upload documents to a listing/Transaction under the EDM section.



The option ***Invalid Documents*** to Re-Submit is where you can see the list of files that have invalid documents. To re-upload a document to a file, note the file address and go to your listings or transaction reports or click on the option upload documents to a listing/Transaction under the EDM section.

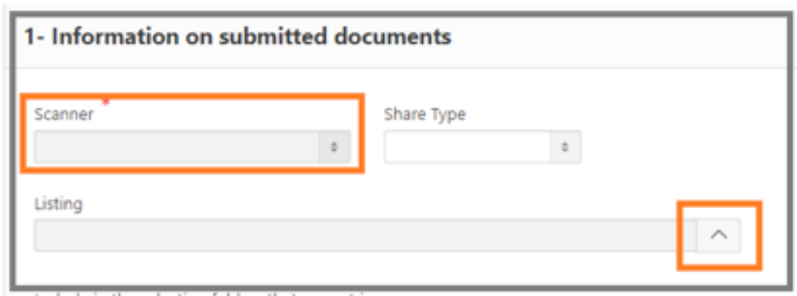


The options upload document to a listing/upload document to a transaction is to upload a document to a specific listings or transaction report by address of the file.

After selecting the option upload documents to a listing/transaction, select from the drop-down menu the scanner information (in same cases this will automatically be entered). Then select the share type. The share type is not mandatory.

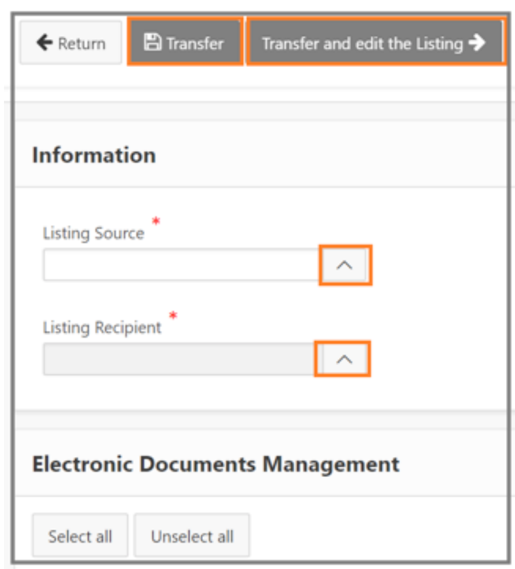
NOTE: The share type is to select who gets to see this document.
Select the listing/transaction address from the menu of your listing in which you would like to upload this document to. If you do no select the listing/transaction address and upload the document anyways, the document will go into the "bunker". Only admin have access to the bunker and you will need to ask your office to add the document to the correct file.

To upload the document, either drag and drop the document into the large square and click anywhere within the square and select the document from your computer.



Then select the document type and click save and close at the top.

The option copy listing documents is used for when you would like to copy documents from one listing to another. This is often used when your listing has expired and has been re-listed and all the documents stay the same. Once you have clicked on the option, select under listing source, the listing you would like documents to be transferred from and then select under listing recipient, the listing you would like the documents to be copied to. Select the documents you would like to transfer and then click on Transfer or transfer and edit the listing (this will allow you to edit the listing that the documents are being copied to).



My documents option is a section for your personal documents (i.e.: brokerage contract). This section can only be viewed by you. Admins do not have access to your documents under this option.

10. Statistics

The Statistics section is available for agents to compare their last 2 years with the current year using graphs.

To view the comparative of your listings over the last two years click on:
Comparative listings last 2 years.

To view the comparative of your transactions over the last two years click on:
Comparative transactions last 2 years.

The Rank listing, transaction and mortgage referrals, will give you the all 12 months with the amounts of listings, transactions and mortgage referrals. The month with the highest ranking will be first on the list.

11. Contacts

The contact section is where you will find all your clients/contact information. When we receive a new listing for the Board/Centris and the contact/clients do not ye exists, it will automatically be created in your contact list with all the necessary information.

The ***My contacts*** section is for you to view all the contacts you have in GimmiWeb. Clicking on the option will give you a list of all contacts either created by you or the board/Centris feed.

The Create CRM section is for you to create a new clients/contact within GimmiWeb.

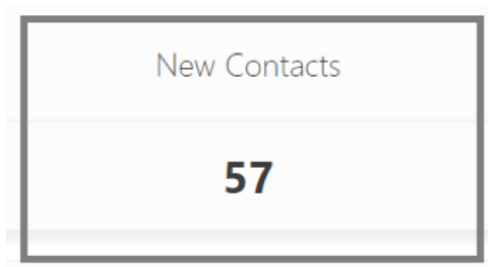
Enter in all the information possible for you clients under the profile

The Share option is if you would like to share this contact with one of your colleagues, you can select who is able to view this contact by selecting in the drop-down menu one of the options: Private, Public, Office Staff, Internal Agents.

If you would like to share the client with Specific Agents only, select their name and move them from the Left Colomn to the right Colomn.

The fields with a star (*) next to them are the only fields that are mandatory for saving. The rest of the information can be entered at a later date.

The ***New Contacts*** option is to view all your new clients/contacts that were created from the board/Centris. The system will only create new contacts if the clients are not already in the system at the time that the listing is created. This will also work if you add a new client within a transaction report, if the system doesn't see the client within the contacts it will create a new contact for you.



The ***Office Roster*** gives you all the contact information for the agents at your office. You have access to their name, email, phone number and certificate number.

The ***Board Offices*** gives you all the contact information for the offices we receive from the board/Centris.
To view all the information for the brokerage, click on the little pencil to the left.

The ***Board Agents*** gives you access to all the agent's information we receive from the board/Centris. You have access to their name, email, phone number and certificate number.

The ***Delete Contacts*** is for deleting any contacts/client's information from the system. Click the checkbox under include to select what clients/contacts you would like to delete.

12. My status

My status section is to let your office know if you are available or not. You will also be able to see if other agents from your office are available as well. There are 4 statuses to select from:

Office (You are in the office and available)
Out – Reachable (You are out of the office but available)
Out – Unreachable (You are out of the office and not available)
Reachable on mobile (You may or may not be in the office, you are available by cell)

You can also add additional information on your status under the: Additional Information on my Status area.

13. Communications

The communications section is to view all the emails you have sent or that are at the status pending. You can also send SMS messages through this area.

To view all emails, select the email option. By default, all the emails that are awaiting to be sent will appear.

You can send all pending emails by clicking on: Send emails in pending.
You can also delete all pending emails by clicking on: Delete emails in pending.

The SMS area is for sending out text messages to your clients via the GimmiWeb system. The clients however, cannot reply to the test message as it is a generic number.

Under this option you will also be able to view all your SMS that have been sent.

The phone assistant option is only available for users using GimmiWeb mobile version. Clicking this option will automatically call your assistant that we have on file.

14. Office

The Office section is available to be able to write to your admin or director, reserve a meeting room, etc.

To send an email to your admin click on: Send note to Admin. Automatically the main admin will be added as the recipient of the email. If this is not the admin you would like to send an email to, click on the address book and select another admin.

To send an email to your director/Manager click on: Send note to Director. Automatically the director will be added as the recipient of the email. If the office has several directors/managers and you like to send an email to a different director, click on the address book and select another admin.

To Reserve a meeting room/Conference room click on: Reserve meeting room, this will bring up a calendar that your office has access to and will be able to see all the dates that the meeting/conference room Is available.

The office roster is to view the agents within your office, you are able to see their full names, email address, phone number board ID and registration ID.

The lawyers/Notaries is the list of all the lawyer's and notaries we have within the system.

15. Bookmarks

The bookmarks section is a place where your office can bookmark all the most important websites you visit on a daily basis.

16. Help

The help section is where you can find the answers to commonly asked question, our training videos and even subscribe to our online training webinars!

If you would like to communicate with us for support, please don't hesitate to use the questions or comments option at the top right corner.