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Powered by RCM LightBox

Quick Start Guide

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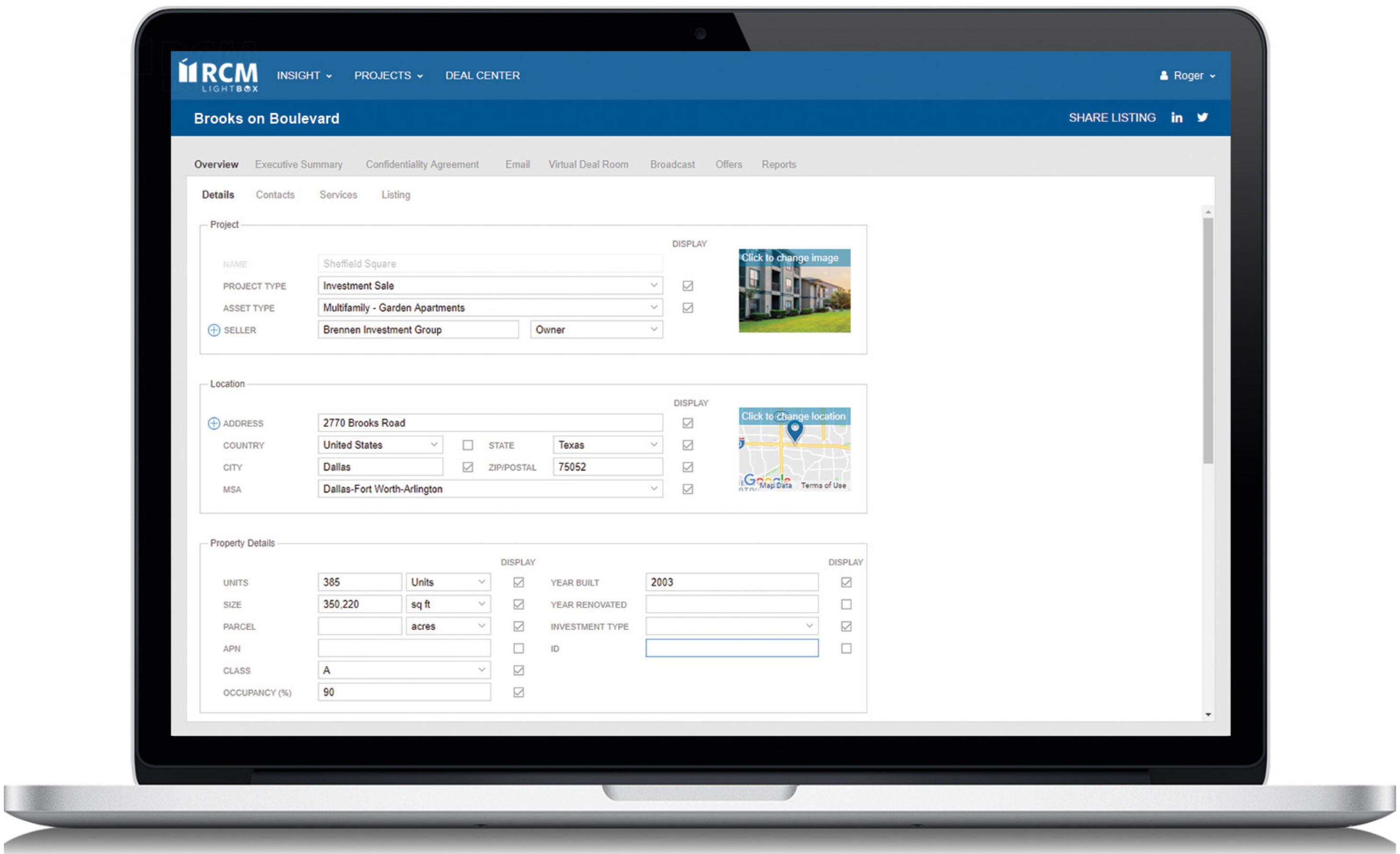
Quick Start Guide for Colliers Users

2021 Edition



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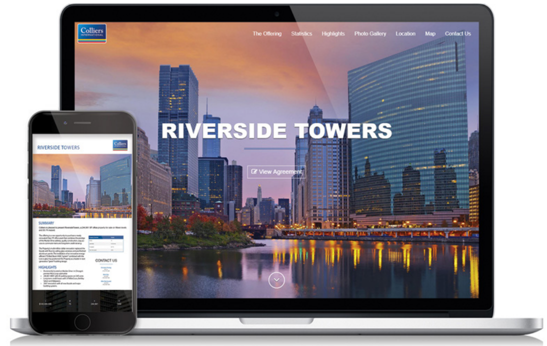

10 Steps to Launching a Project

1. **Add new listing** to RCM LightBox Platform to include in Colliers SalesTracker
   a) **Upgrade to full marketing package**

2. Input property information on the **Overview/Details** tab in RCM LightBox.

3. Add team contacts and project administrators to the **Overview/Contacts** tab.

4. Create your **Executive Summary Landing Page.**

5. Upload your **Confidentiality Agreements** (Principal and Broker).

6. Set up your **Emails** (initial broadcast, VDR invite, etc.).

7. Upload your offering memorandum and other due diligence documents to the **Virtual Deal Room.**

8. Set up the **Offers** tab.

9. Populate your investor list.
   a) Import your Buyer List on the **Broadcast** tab.
   b) Query the RCM LightBox Database (if Premium Package purchased)
      - Go to the Broadcast Tab
      - Click on the Admin button
      - Select Add RCM Principals

10. Send a test **Broadcast** to yourself and team. Once approved, request the broadcast through the platform.

Congratulations on launching your project with SalesTracker powered by RCM LightBox! Be sure to confirm project information at **sales.colliers.com**.

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Getting Started – Create New Project

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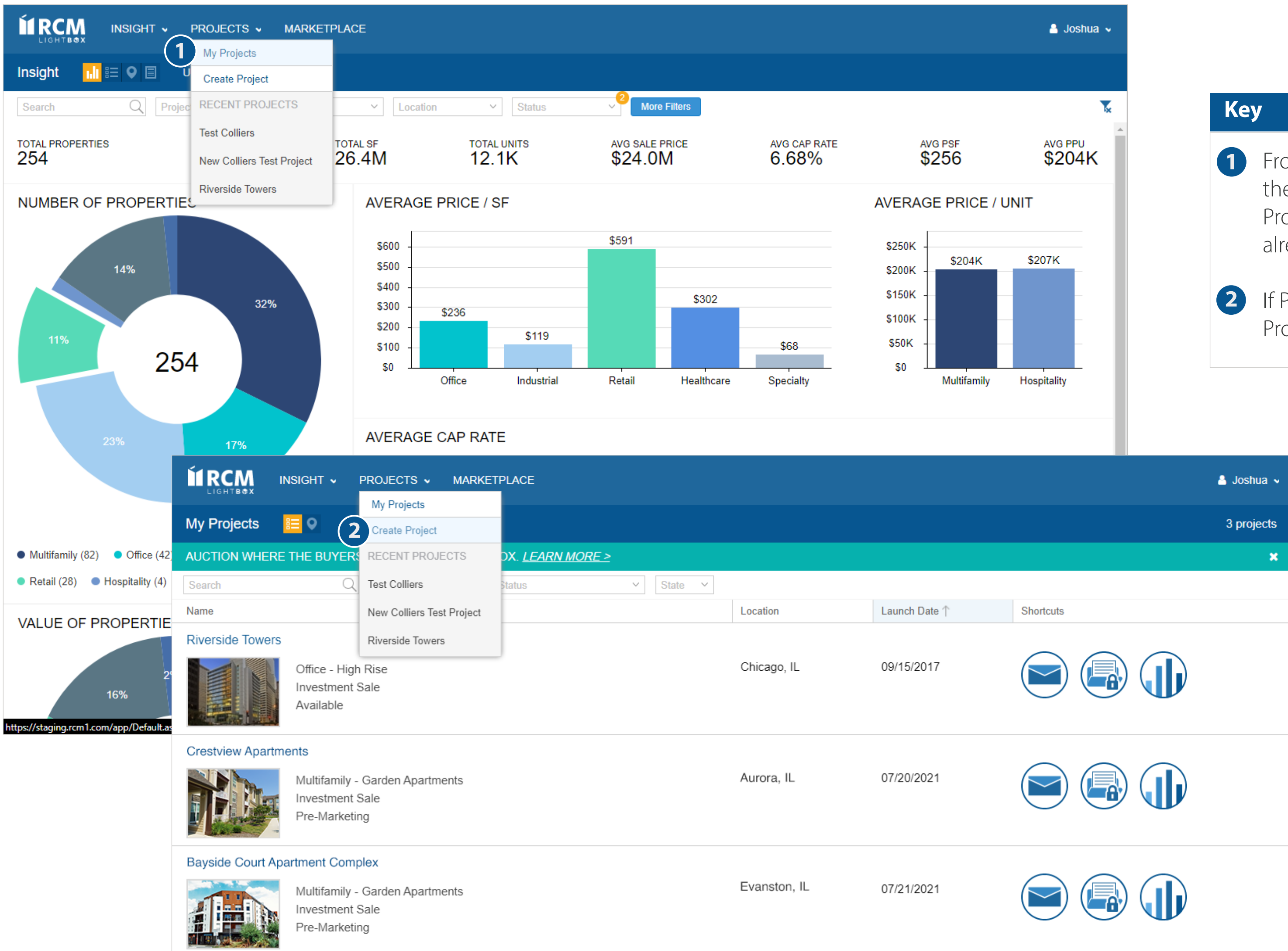
Adding new listings to Colliers SalesTracker

Once logged into Colliers SalesTracker on the RCM LightBox platform, adding your new listing is easy.



Key

1. From the Dashboard view, navigate to the "Projects" dropdown and select "My Projects" to verify the listing has not already been created

2. If Project does not exist, select "Create Project" to create a new listing

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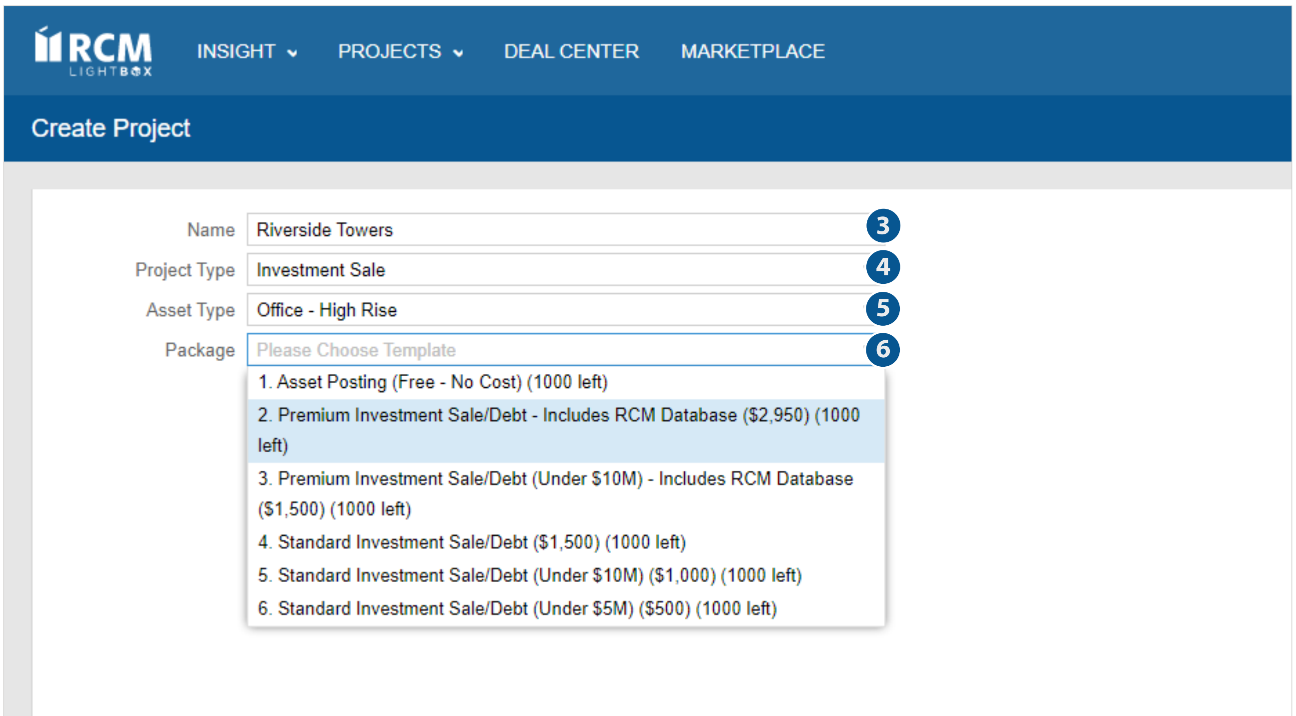
Adding new listings to Colliers SalesTracker (cont'd)



Key

3 Enter in the name of the new listing

4 Select the appropriate Project Type

5 Select the appropriate Asset Type

6 Select the appropriate Package
(see next page for package details)

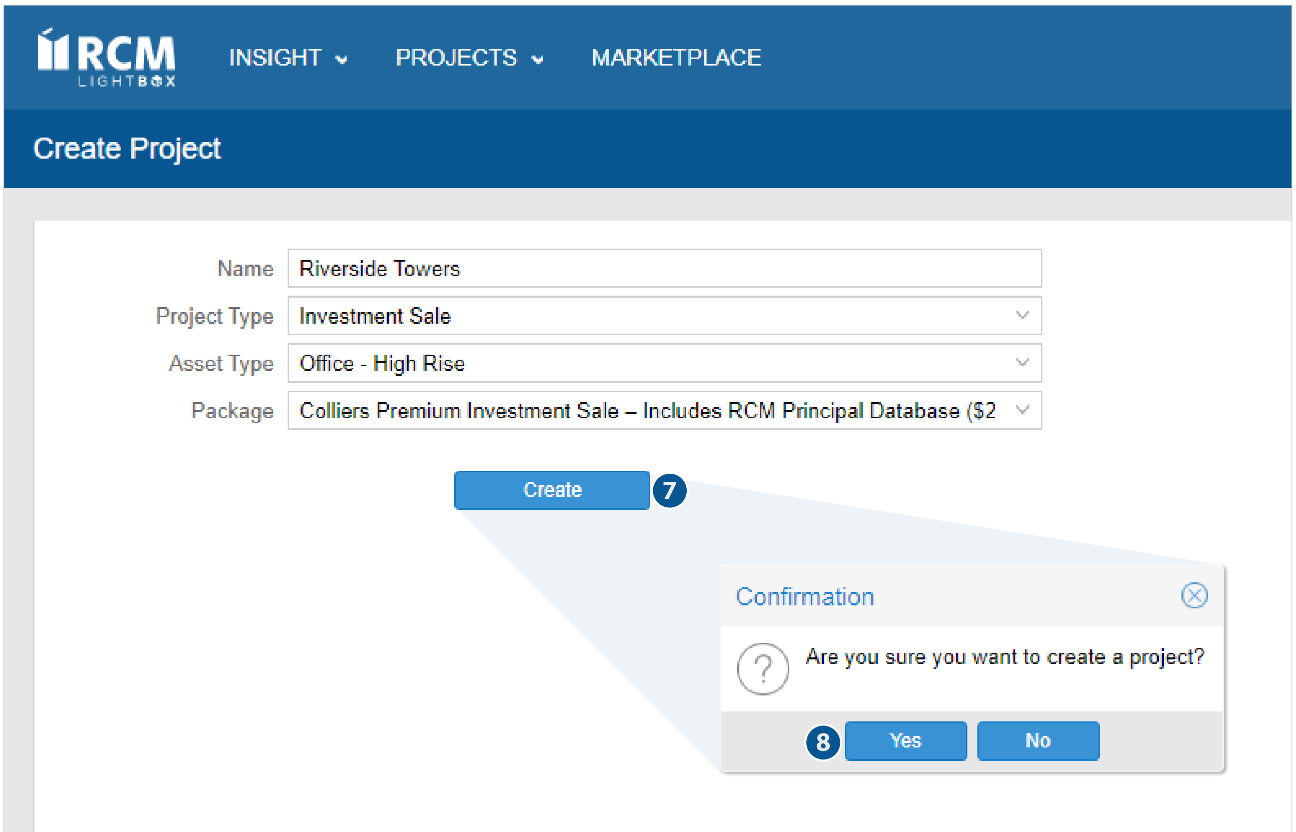
- Asset Posting (Free-No Cost)
- Premium Investment Sale/Debt – Includes RCM Database ($2,950)
- Premium Investment Sale/Debt (Under $10M) – Includes RCM Database ($1,500)
- Standard Investment Sale/Debt ($1,500)
- Standard Investment Sale/Debt (Under $10M) ($1,000)
- Standard Investment Sale/Debt (Under $5M) ($500)

Package Details	Basic Asset Posting	Listings Over $10M: Premium Investment Sale or Debt & Equity	Listings Over $10M: Standard Investment Sale or Debt & Equity	Listings Under $10M: Premium Investment Sale	Listings Under $10M: Standard Investment Sale	Listings Under $5M: Standard Investment Sale
Package Pricing	$0	$2,950	$1,500	$1,500	$1,000	$500
Asset Posting Features	✓	✓	✓	✓	✓	✓
Upgraded Package Features		✓	✓	✓	✓	✓
Includes RCM Vetted Market Participants			✓		✓	✓
Includes RCM Principal or Lender Database RCM database of investors / lenders whose criteria align with the asset. *Based on single RCM Transaction Type/Region. Supplemental Types and Regions are available for additional cost.		✓		✓		

All Asset Postings Feature:
- Ability to add, update and remove assets as well as update summary listing information
- Display primary image and asset summary information
- Assets can be searched, filtered, and mapped
- Contact information displayed for up to three team members
- Sync via API to Colliers.com & OurListings

All Upgraded Packages Feature:
- Create asset posting to integrate with SalesTracker
- Client-branded Executive Summary Landing Page
- Ability to import up to 8,000 client-provided users
- Two email broadcasts to all users, one additional broadcast to Responders and unlimited emails to Approved users
  **Responders: Any user that has viewed a broadcast*
  **Approved Users: Any user that has access to the Virtual Deal Room®*
- Online execution of client-provided Confidentiality Agreements
- Client-branded Virtual Deal Room with 100 MB of data storage
- Online Offer Management
- Real-time tracking and reporting on all end-user activity
- 180-day term of service
- Dedicated Colliers Account team to provide training and ongoing support

Adding new listings to Colliers SalesTracker (cont'd)



Key

7 Click "Create" to create your new listing

8 Click "Yes" to confirm

Overview Tab

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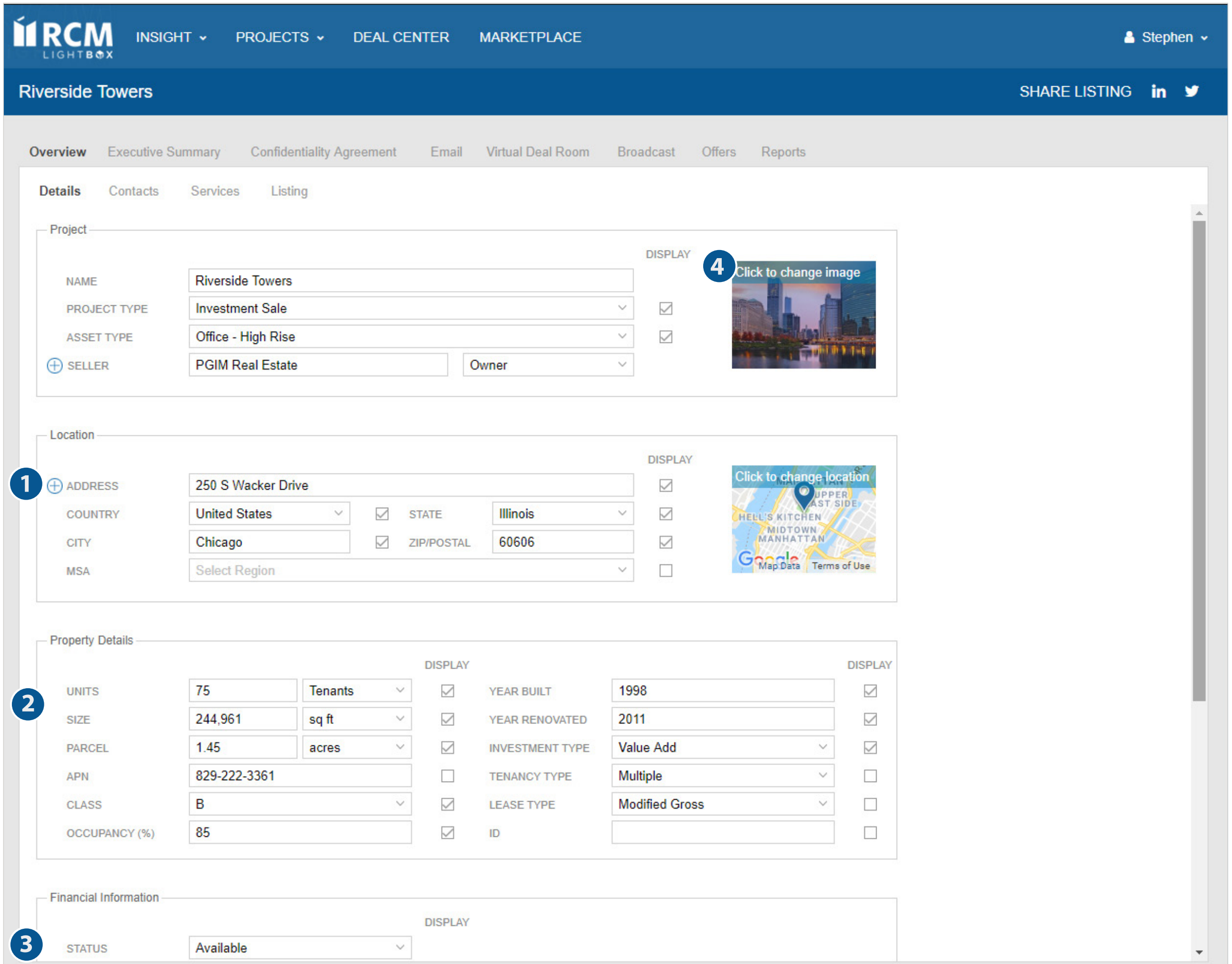
Overview/Details

The Overview/Details tab is where you input your Project information such as the name, asset type, location, description, and asking price.
Fields that are checked to Display will be shown on your Executive Summary Landing Page, as well as publicly on the RCM LightBox Marketplace, and SalesTracker.

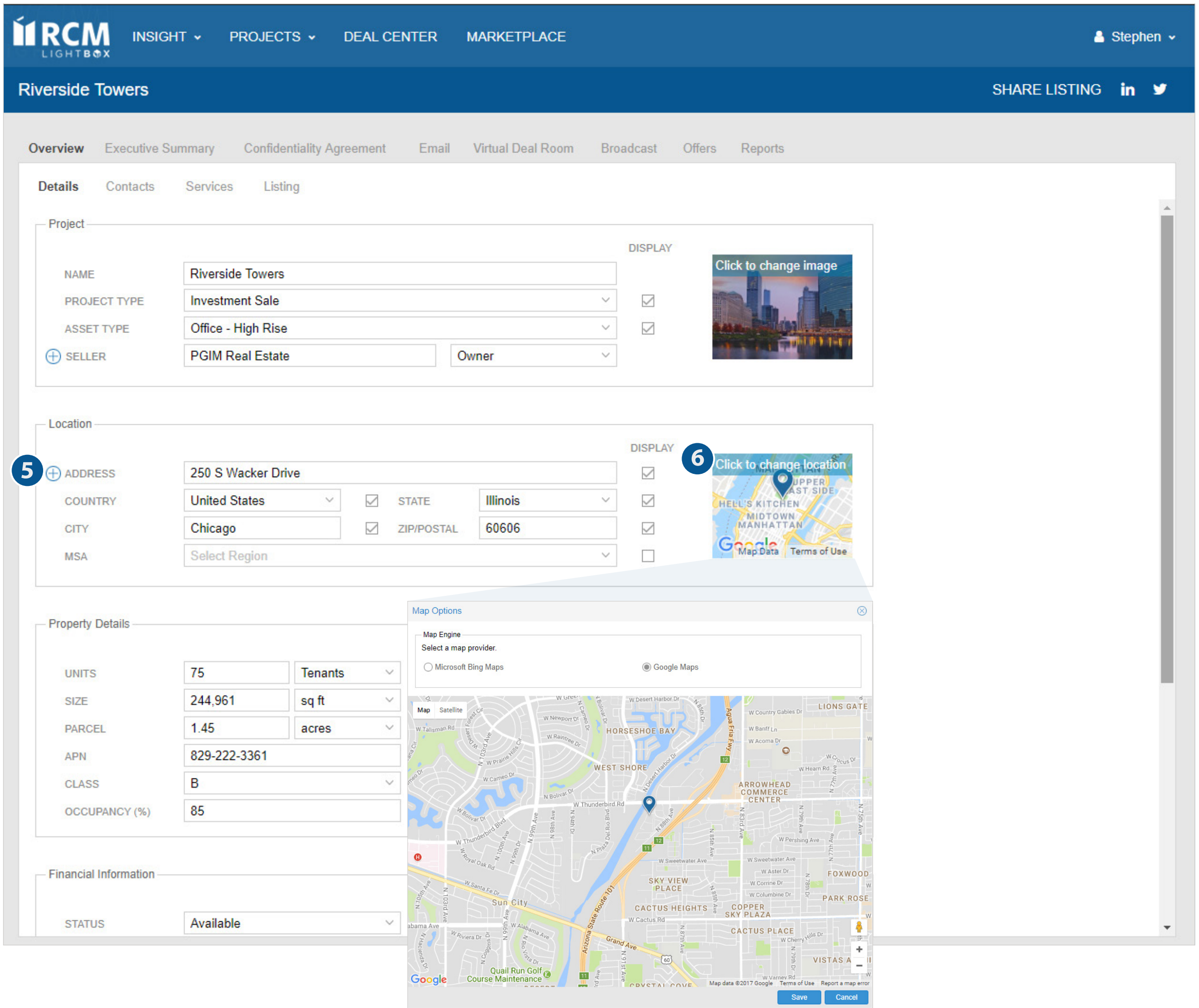


Key

1. Click the plus sign to map multiple addresses.
2. Property Detail Fields are based on Asset Type.
3. Projects will automatically move from Pre-Marketing to Available after initial broadcast.
4. Upload Primary Image to be displayed on SalesTracker and the RCM LightBox Marketplace.

Quick Tip: If you change your status to Taken Off Market or Sold, all access links will be deactivated and your listing will automatically be removed from SalesTracker and the RCM LightBox Marketplace.

Overview/Details (cont'd)



Key

5 The listing pin displayed on the Project, SalesTracker, the RCM LightBox Marketplace and your Executive Summary, is automatically set based on the address entered.

6 Click the map to verify or edit the pin location, set the zoom level, and choose either Bing or Google maps.

NOTE: Any change you make to the project address will affect the mapping. Incomplete addresses (missing zip code, misspelled street name) will not map correctly and will need to be set manually.

Quick Tip: To edit the map view/pin of additional addresses, click on the plus sign, choose the address and select Edit to adjust the map.

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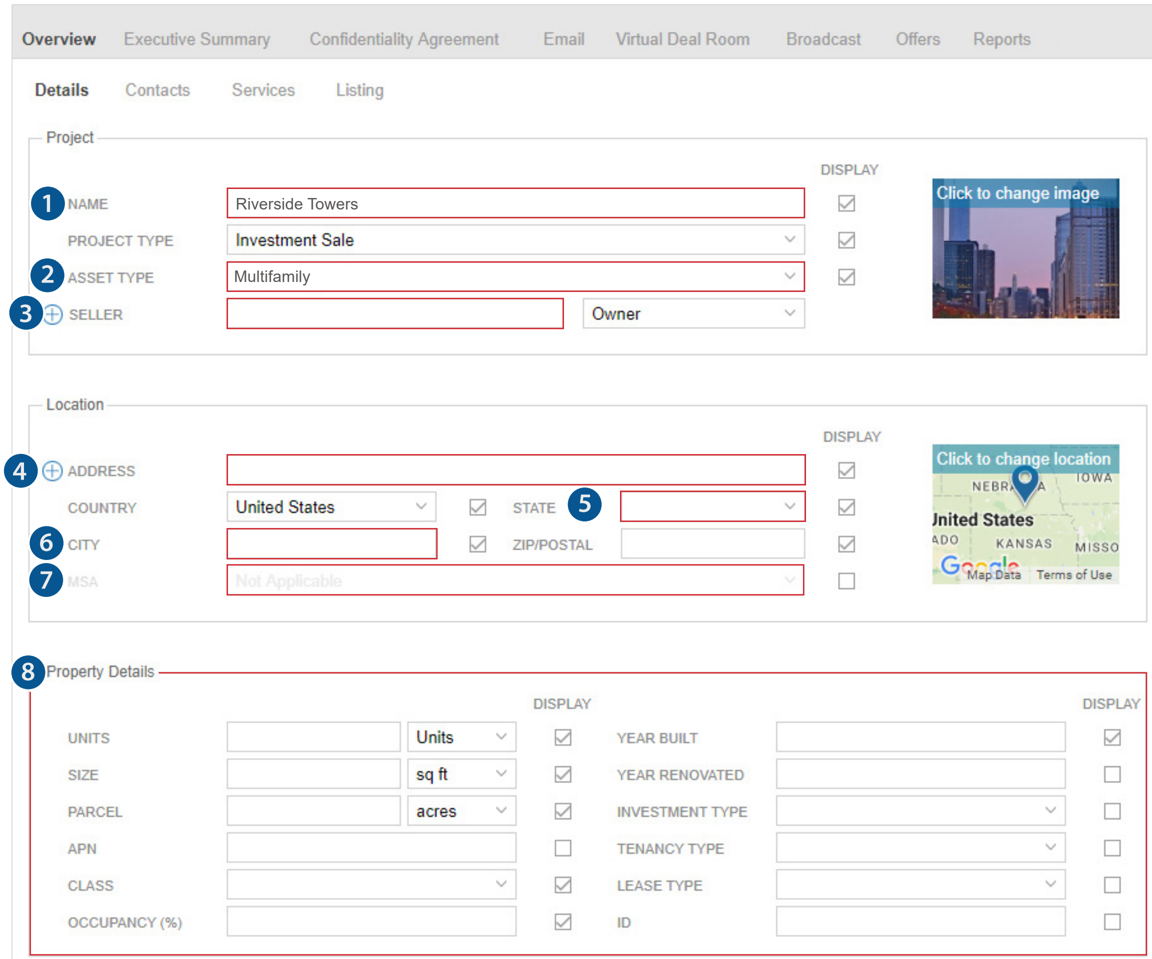
Required Fields

The fields below are required by the system and must be populated to save information on this tab and move forward on the platform. The data collected will allow us to maximize the value of RCM LightBox's Business Intelligence tool, inSIGHT.



Key

Required Fields

1. Property Name
2. Verify the Asset Type is correct
3. Seller
   - Use true client (i.e. JP Morgan, TH Realty) not property-specific LLC
   - Be sure to select pre-populated company name from drop-down list in Seller field, when available
4. Address(s)
5. State
6. City
7. MSA
8. Property Details

   (Property Details required field will depend on the selected asset type. *Units, Size, Parcel)

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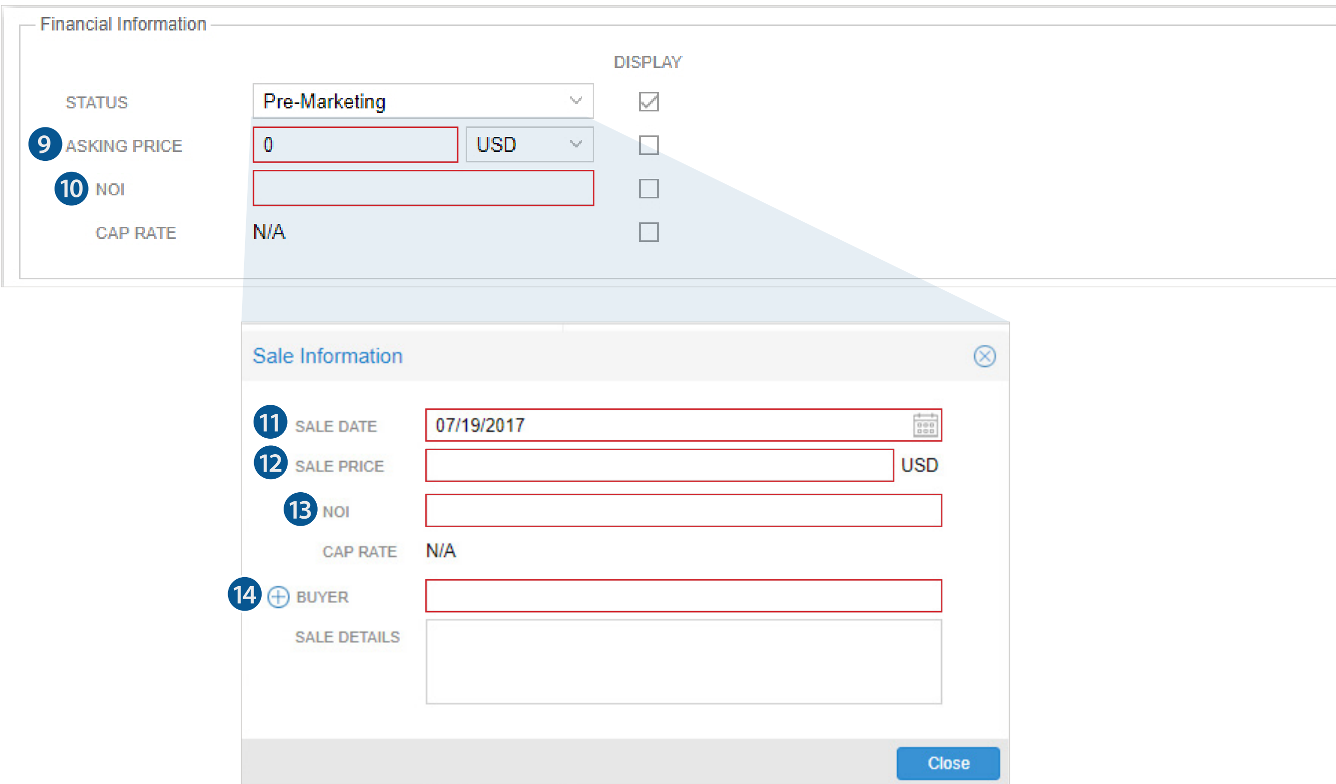
Required Fields

The fields below are required by the system and must be populated to save information on this tab and move forward on the platform. The data collected will allow us to maximize the value of RCM LightBox's Business Intelligence tool, inSIGHT.



Key

Premarketing/Marketing (cont'd)

9. Asking Price
10. NOI (Estimated)
    - As default, use Year-1 NOI

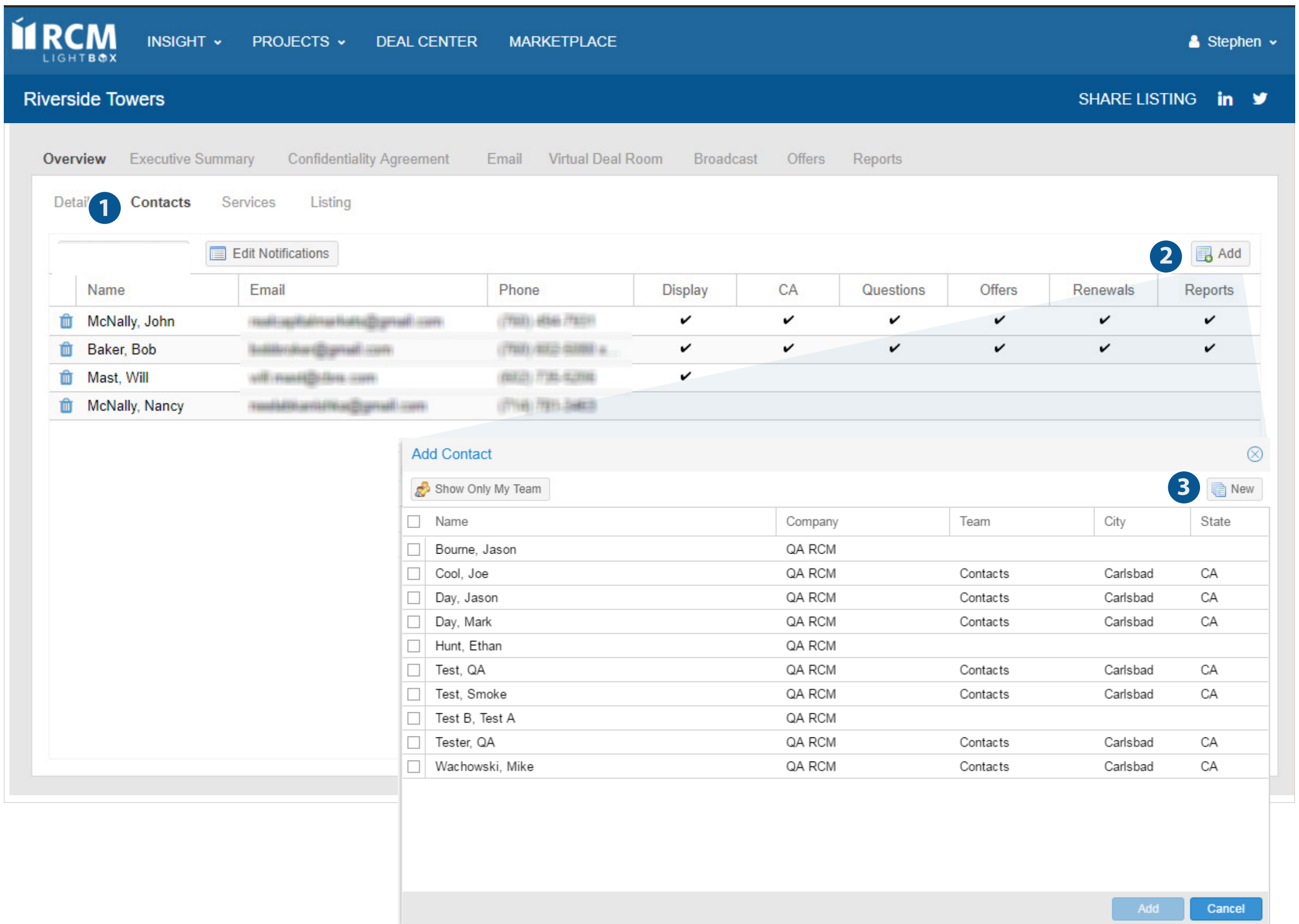
Sold Status

Change the Status to Sold and enter in the below required fields.

11. Sale Date
12. Sale Price
13. NOI (Actual)
    - Cap rate automatically calculated when price and NOI are entered
14. Buyer
    - Use true client name (i.e. JP Morgan, TH Realty) not property-specific LLC
    - Be sure to select pre-populated company name from drop-down list in Seller field, when available

Overview/Contacts

Everyone listed on the Overview/Contacts tab has administrative access to your Project. Here you will add or remove administrative contacts and designate individuals to receive notifications such as Executed Agreements, Questions, Offers, Project Expirations and Reports.



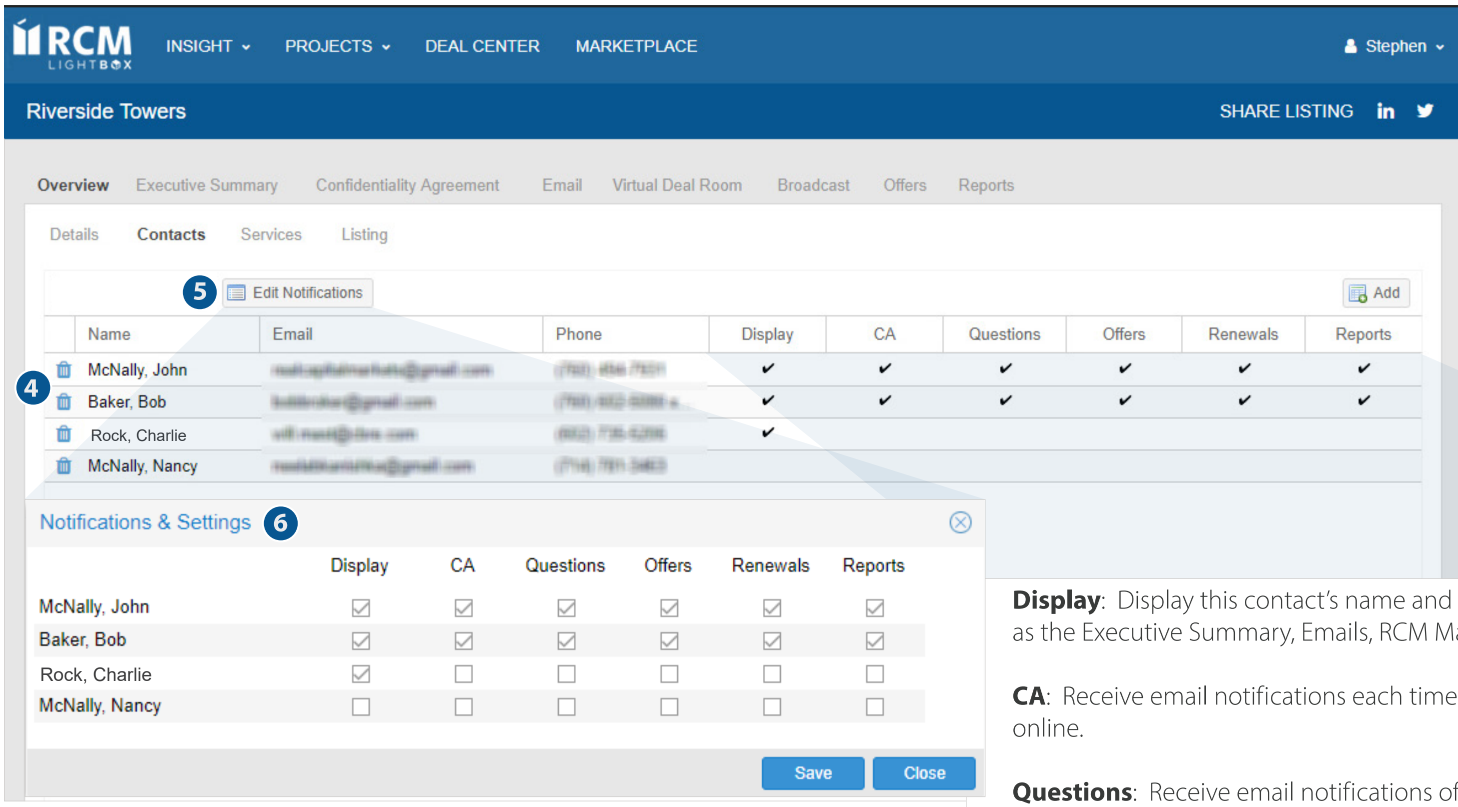
Key

1. Click Contacts to view contacts who can administer your Project.
2. Click the Add button to add administrative contacts.
3. Click New to create new contacts.

NOTE: You can limit contacts to specific tabs in your Project. For example, you can provide your Seller access only to the Virtual Deal Room to upload documents. They will be unable to access the other tabs. Please contact your account manager to set these permissions.

Quick Tip: You can give administrative access to the Seller so they can log in and view reports or upload files to the Virtual Deal Room.

Overview/Contacts (cont'd)



Key

4. Re-order names by dragging them to the desired location (i.e. if you would like Bob Baker to appear as the first contact on the listing, move his name to the top).

5. Click to set and edit Notifications.

6. Select the Notifications each contact should receive. At least one contact is required to receive Renewals and Questions.

Display: Display this contact's name and information on investor-facing pages such as the Executive Summary, Emails, RCM Marketplace, Offer and Auction pages.

CA: Receive email notifications each time a User executes a Confidentially Agreement online.

Questions: Receive email notifications of questions submitted via the platform and when a user declines the offering.

Offers: Receive email notifications of offers submitted online.

Renewals: Receive email notifications when your Project is approaching expiration.

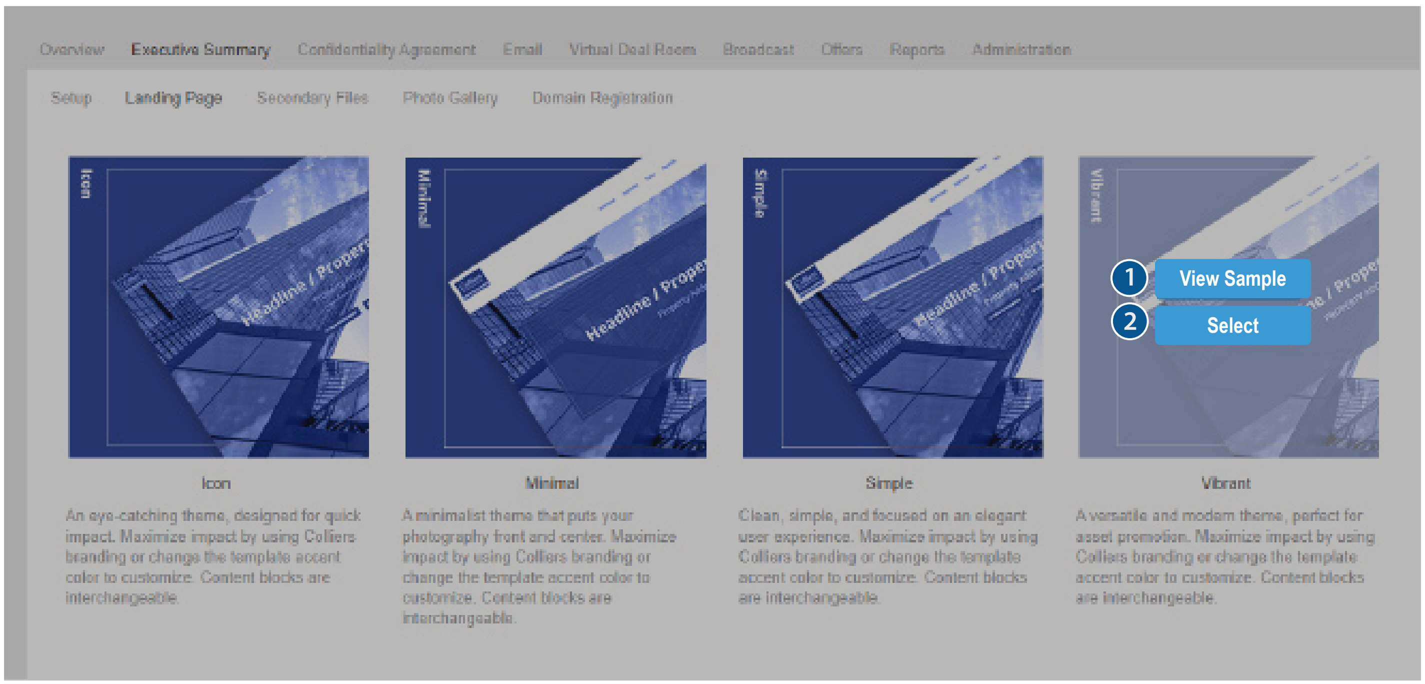
Reports: Receive Project Activity Reports 3 and 10 days after the Initial Broadcast.

Quick Tip: You can mouse over each checkbox for a definition of each notification.

Executive Summary Tab

Selecting Your Landing Page Template

Once you have created a project, you'll be able to customize a Landing Page that highlights your listing using one of the approved Colliers branded templates. Preview and select the Landing Page template you would like to use under the Executive Summary Tab.



Key

1. To preview a template, click View Sample. Note the preview includes placeholder content.
2. To select your template, click Select.

Quick Tip: Your template library may contain corporate branded templates.

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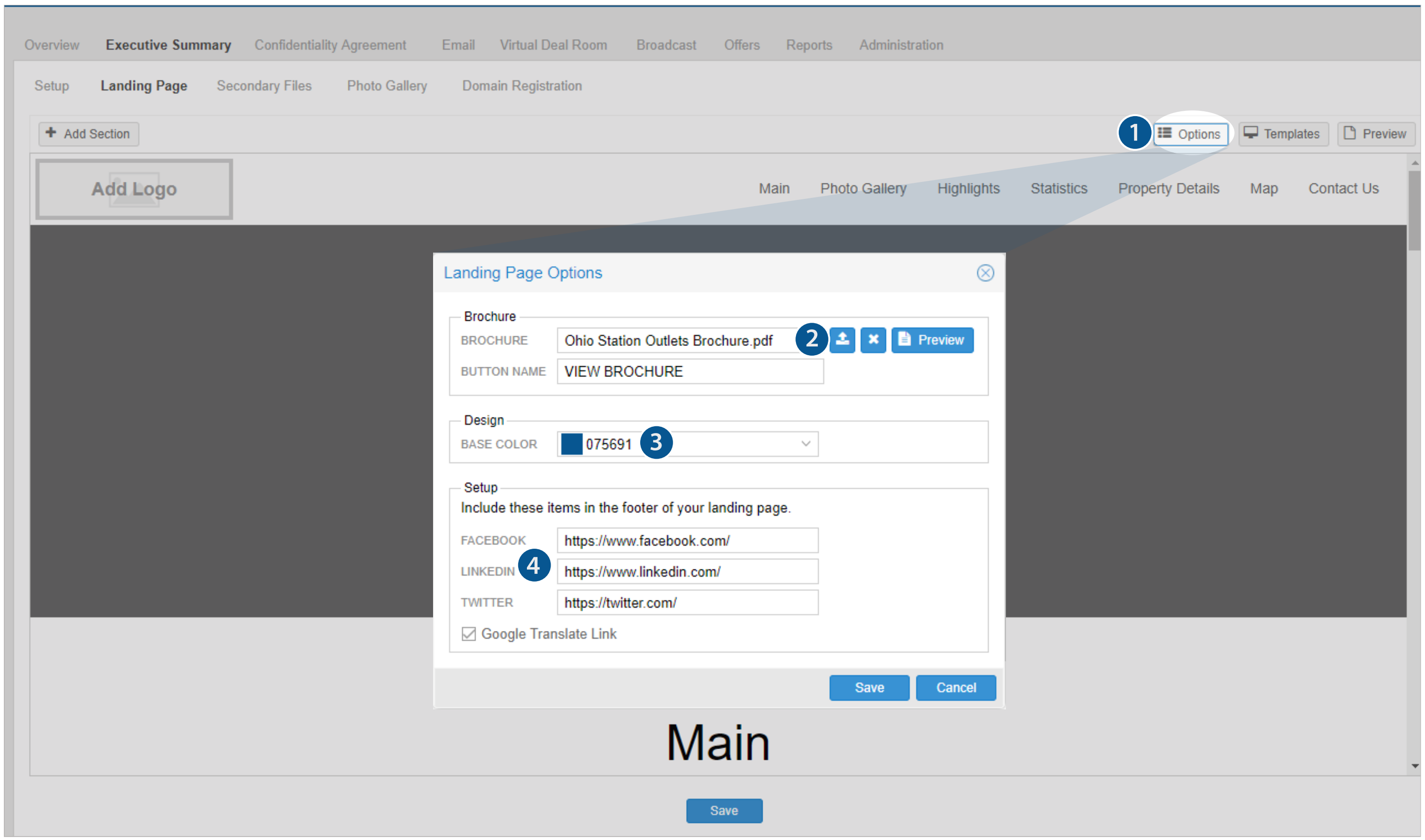
Customizing Your Landing Page

Once you have selected the desired template, customizing your Landing Page is quick and simple.



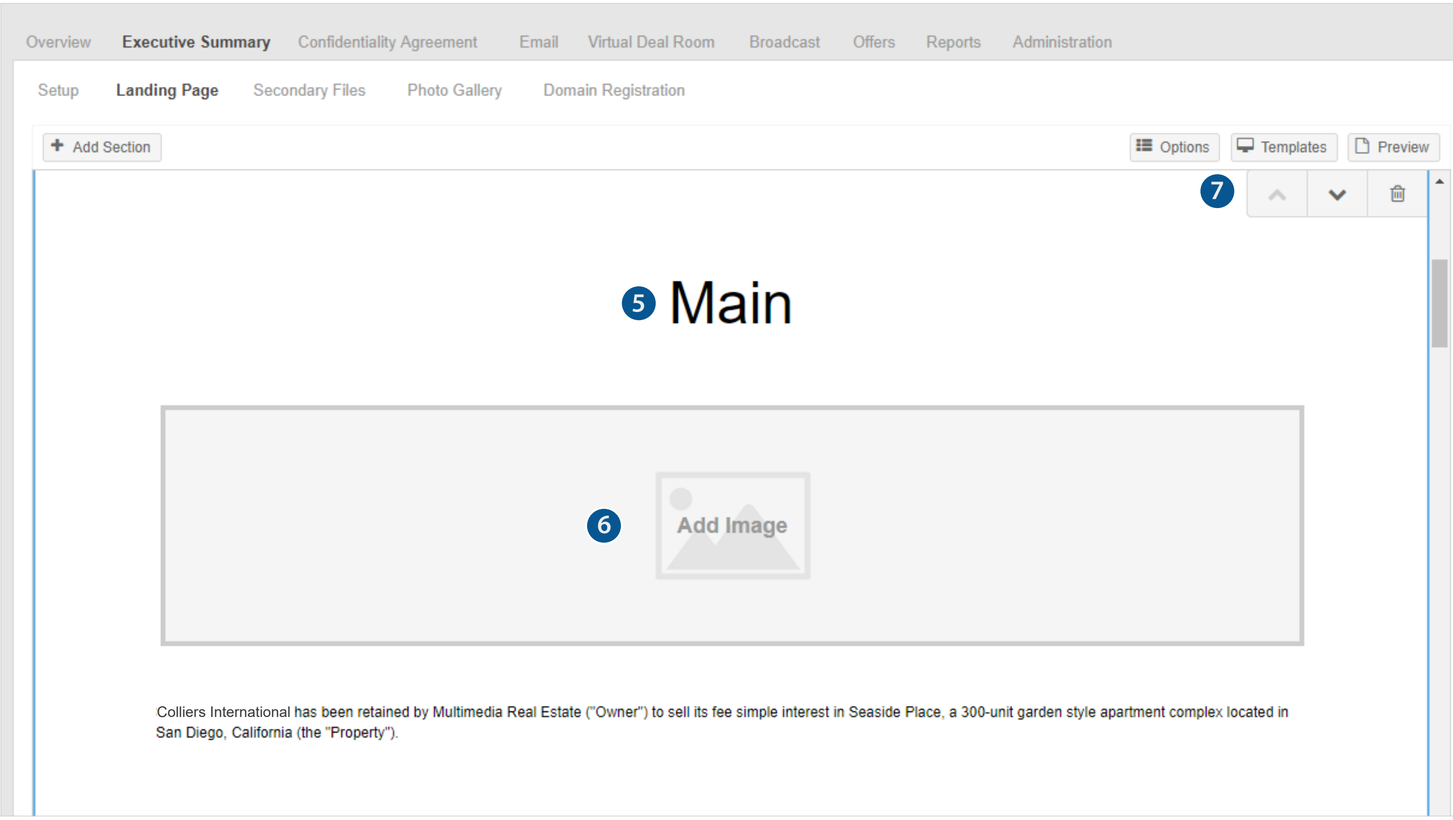
Key

1. Select the Options button, located on the top right, to start customizing.
2. Select the Upload icon to include a brochure, and upload your PDF here.
3. Enter your base (accent) color of the site as a hex value, or use the drop down for a color selection tool if the template allows you to edit.
4. Enter links to your social media pages, which will display in the footer of the site. To remove the social media icon, delete the URL and Save. Empty field will hide the social media icon.

   NOTE: Accent color and social media icons may have been preselected according to Colliers corporate brand standards. In this case, you will not be able to make changes.

Customizing Your Landing Page (cont'd)

Continue your customizations by uploading images and text.



Key

5 Add text and update section header names by clicking in each section within the editor.

6 To upload section images, hover over any of the image placeholders within the editor and an add image icon will appear - select Add/Insert Image.

Recommended Image Sizes:
- Logo: 200px X 60px
- Background - Main: 2048px X 1365px
- Background - Statistics: 2048px X 2048px
- Footer: 2048px X 1365px

The map image, property address, statistics (asking price, units, size, year built), and contacts will automatically populate from your project overview page, if checked to display.

7 Move or remove sections by hovering over a section. Arrows and a trash can will appear in the upper right corner of each section.

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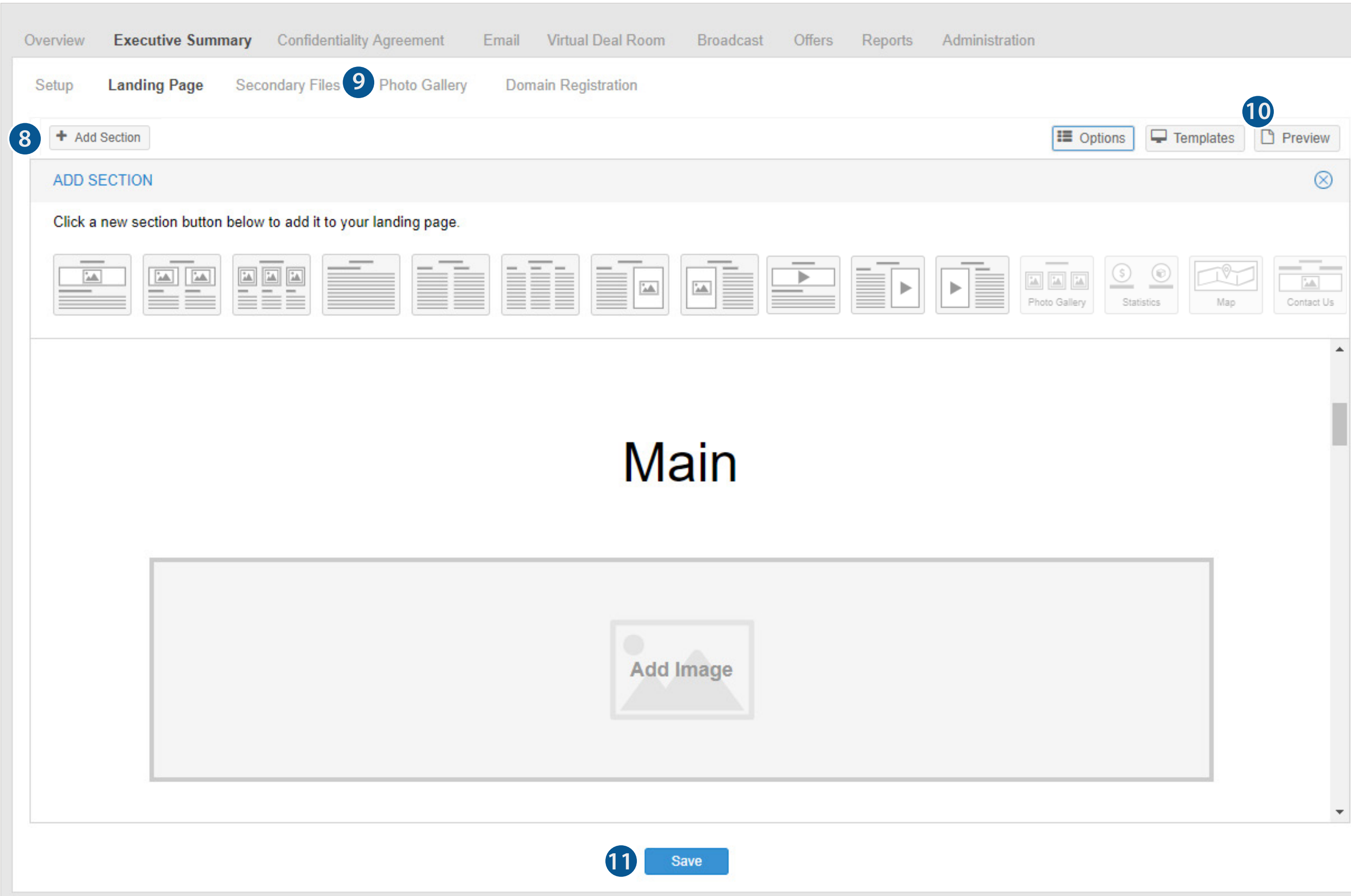
Customizing Your Landing Page (cont'd)

Continue your customizations by uploading images and text.



Key

8 Add a new section and select the layout at the top of the editor by clicking the Add Section button.

9 Add photos to the Photo Gallery section by inserting them within the Photo Gallery tab (not the Landing Page tab).

10 Preview the Landing Page at any time using the Preview button located at the top right (next to options).

11 Don't forget to click Save at the bottom of the page when you make changes to your landing page.

Confidentiality Agreement Tab

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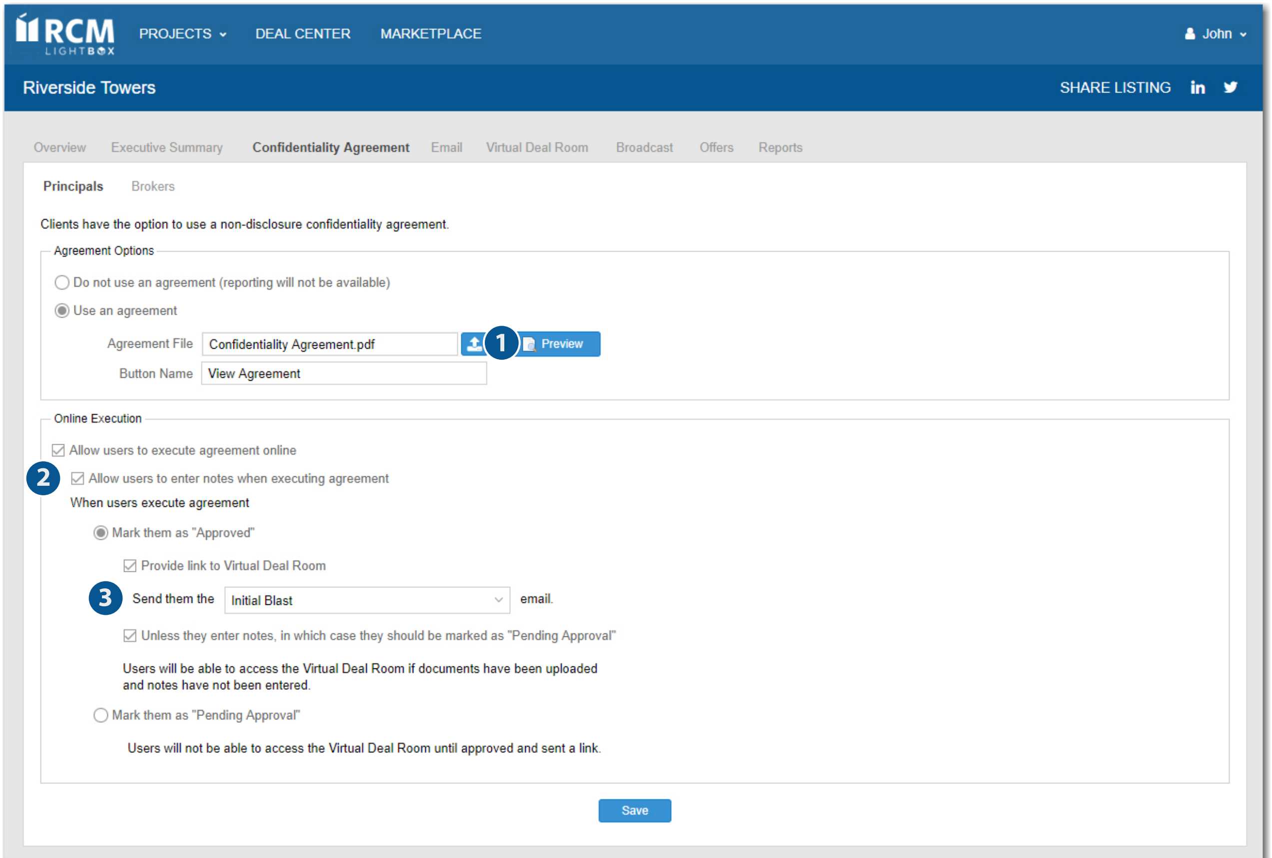
Confidentiality Agreement (Principals)



Key

1. Upload your Confidentiality Agreement in PDF Format using the upload icon. Click on preview to review.
2. Allow investors to enter notes on the Agreement when executing.
3. If investors are allowed immediate access to the Virtual Deal Room upon executing your agreement, send them a VDR Invite email that provides them access to the VDR for use at a later time.

- You have the option to use a separate Confidentiality Agreement (CA) for principals and brokers on each Project. If you choose not to use a Confidentiality Agreement, Agreement reporting will not be available.
- Using the Online Execution setting is recommended. Investors simply verify their contact information and agree to the terms of the uploaded document - no need to print, sign, and fax back to you. All investor actions are recorded, and a printable version of the executed agreement is available to you via Reports.
- Choose whether to grant immediate access to the Virtual Deal Room upon execution of the CA or manually approve investors at a later time. You also have the option to grant immediate access unless they have entered notes to the Agreement.

Quick Tip: The platform is smart and will display the correct Principal/Broker agreement based on the User's industry role.

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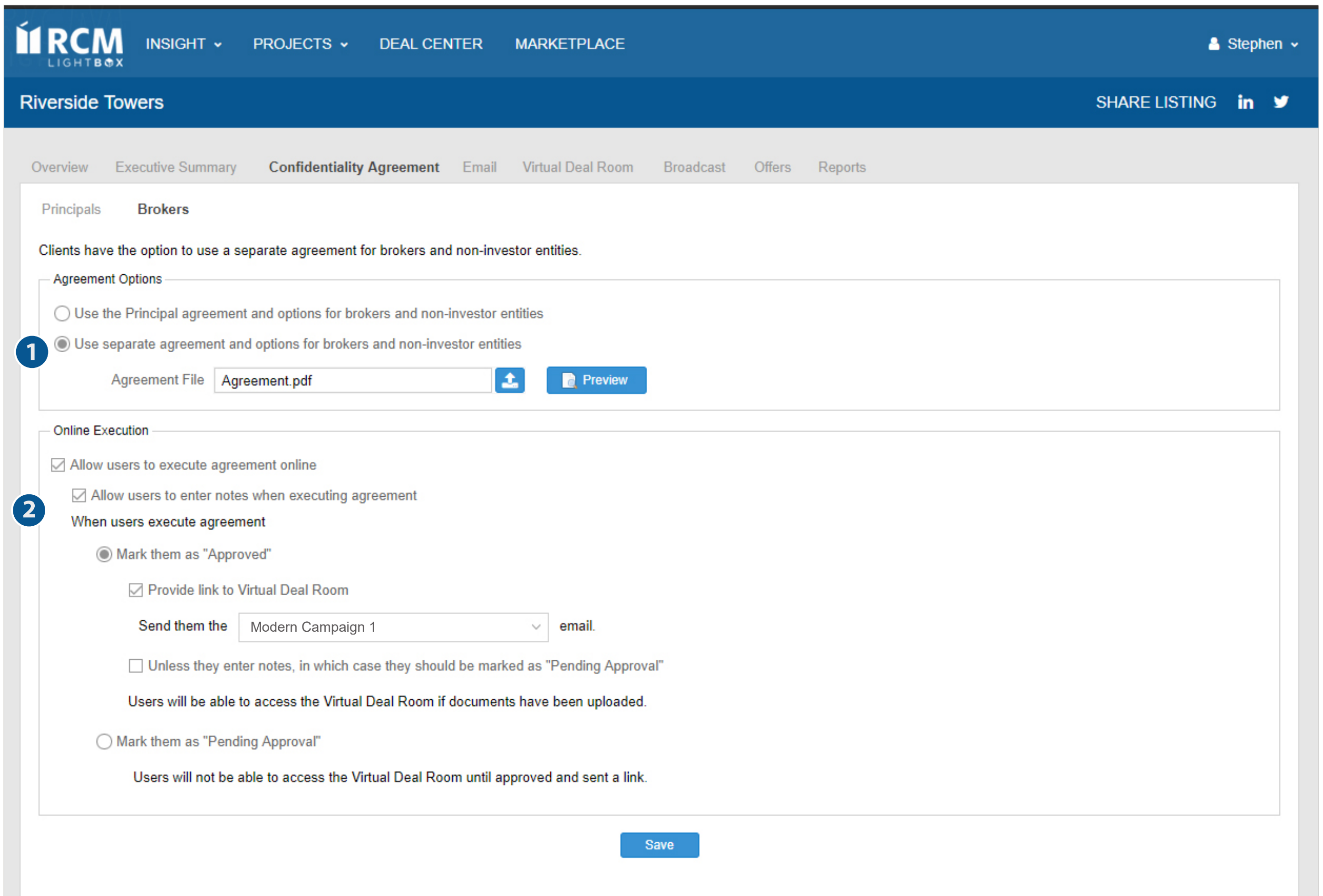
Confidentiality Agreement (Brokers)

The system will display the appropriate Confidentiality Agreement based on the User's Industry Role (ex: Principal or Broker).



Key

1. Option to use a separate agreement for Brokers with different permissions.
2. If your Broker Confidentiality Agreement requires brokers to input their client information, consider disallowing online execution. Instead, require Brokers to print, fill in required fields and send back.

Quick Tip: You can upload and enable a broker agreement at anytime during the marketing process.

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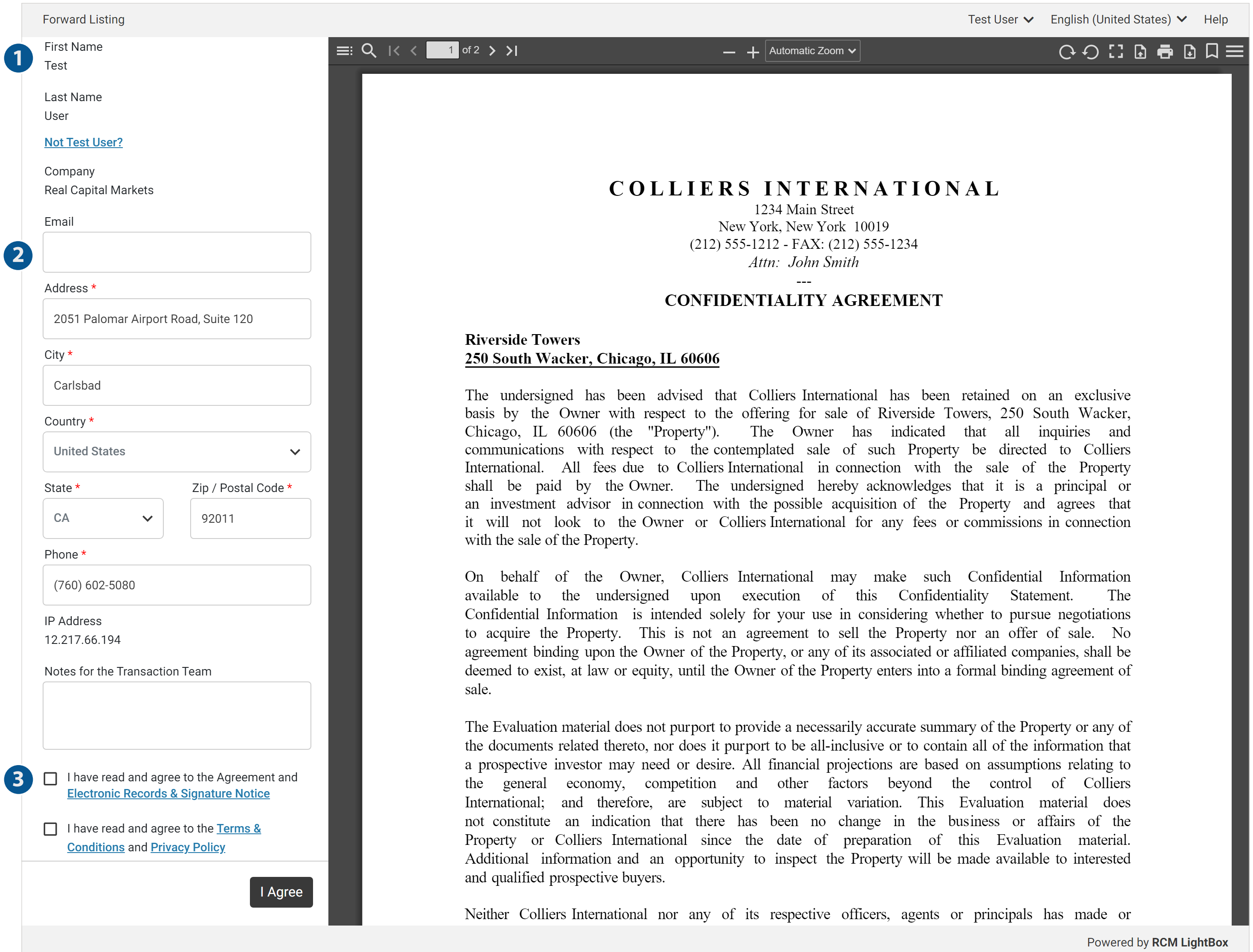
Confidentiality Agreement (Investor View)

The mobile friendly Confidentiality Agreement will appear to investors with their name and contact information pre-populated to the left. Investors can add/edit their contact information, add notes (if allowed), and agree to the Agreement online.



COLLIERS INTERNATIONAL
1234 Main Street
New York, New York 10019
(212) 555-1212 - FAX: (212) 555-1234
Attn: John Smith

CONFIDENTIALITY AGREEMENT

Riverside Towers
250 South Wacker, Chicago, IL 60606

The undersigned has been advised that Colliers International has been retained on an exclusive basis by the Owner with respect to the offering for sale of Riverside Towers, 250 South Wacker, Chicago, IL 60606 (the "Property"). The Owner has indicated that all inquiries and communications with respect to the contemplated sale of such Property be directed to Colliers International. All fees due to Colliers International in connection with the sale of the Property shall be paid by the Owner. The undersigned hereby acknowledges that it is a principal or an investment advisor in connection with the possible acquisition of the Property and agrees that it will not look to the Owner or Colliers International for any fees or commissions in connection with the sale of the Property.

On behalf of the Owner, Colliers International may make such Confidential Information available to the undersigned upon execution of this Confidentiality Statement. The Confidential Information is intended solely for your use in considering whether to pursue negotiations to acquire the Property. This is not an agreement to sell the Property nor an offer of sale. No agreement binding upon the Owner of the Property, or any of its associated or affiliated companies, shall be deemed to exist, at law or equity, until the Owner of the Property enters into a formal binding agreement of sale.

The Evaluation material does not purport to provide a necessarily accurate summary of the Property or any of the documents related thereto, nor does it purport to be all-inclusive or to contain all of the information that a prospective investor may need or desire. All financial projections are based on assumptions relating to the general economy, competition and other factors beyond the control of Colliers International; and therefore, are subject to material variation. This Evaluation material does not constitute an indication that there has been no change in the business or affairs of the Property or Colliers International since the date of preparation of this Evaluation material. Additional information and an opportunity to inspect the Property will be made available to interested and qualified prospective buyers.

Neither Colliers International nor any of its respective officers, agents or principals has made or

Key

1. Investor's name and contact information are pre-populated with the information on file in the RCM LightBox database or in your uploaded list.
2. Investors are able to add their email address. **NOTE:** This is not a required field for investors to execute the Agreement.
3. Investors must agree to the Electronic Records & Signature, Terms & Conditions and Privacy Policy prior to executing the agreement.

Quick Tip: If your uploaded list contains incomplete information, investors will be required to complete before executing.

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Email Tab

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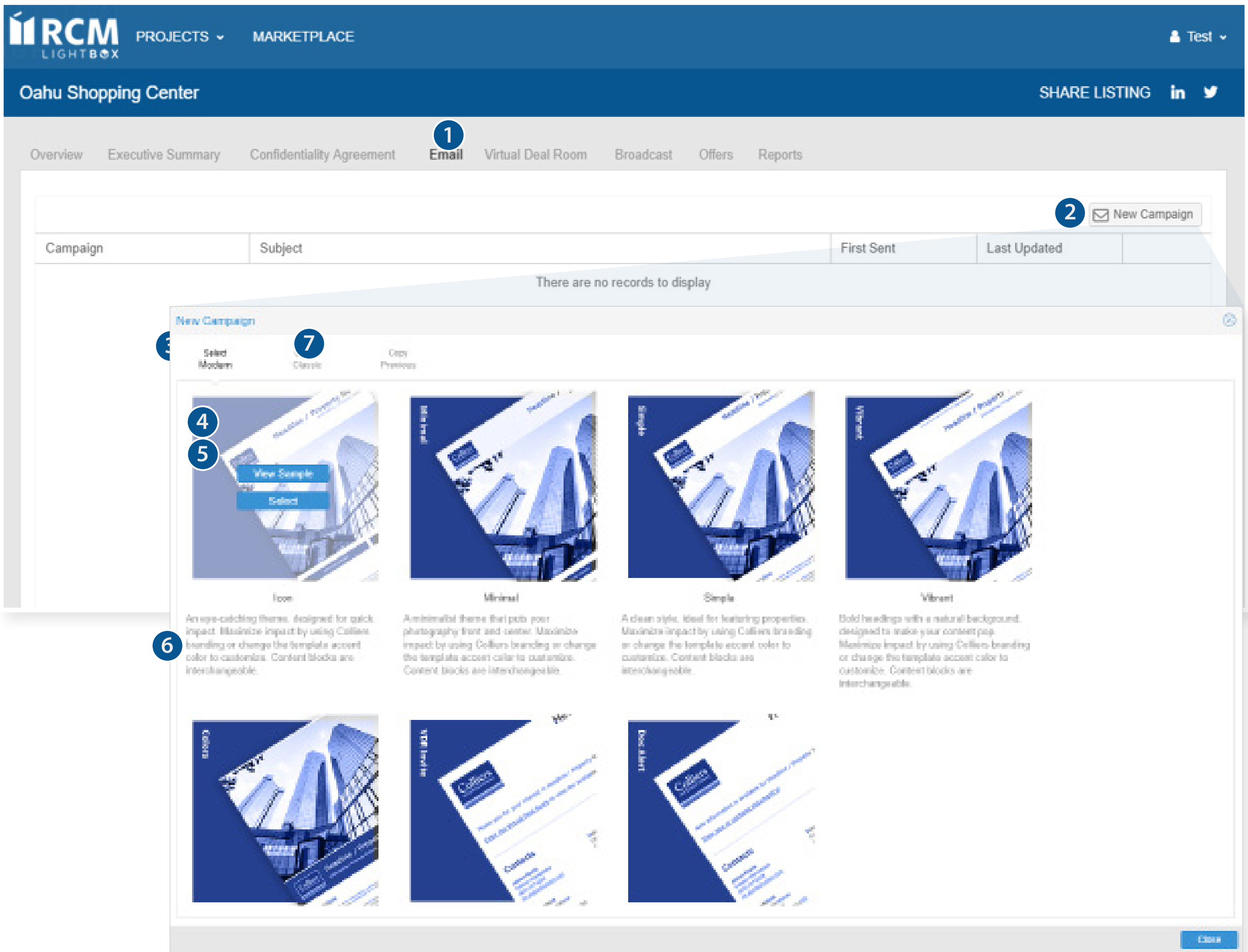
Creating Your Mobile Friendly Email Campaign

Once you have created a project, you'll be able to personalize email campaigns using the Colliers templates provided.



Key

1. Navigate to the Email Tab.
   - No emails will be displayed until the first campaign is created.
2. Click on New Campaign.
3. Available email templates will be displayed.
4. Click View Sample to preview with placeholder information.
5. Select the desired template.
6. Read brief decription of the template attributes to choose the best template to showcase your listing
7. You also have the option to copy a previous email from another project.
   - Click Copy Previous
   - Enter the project name, click search and select the email(s) you wish to copy.

Quick Tip: Your template library contains Colliers corporate branded templates.

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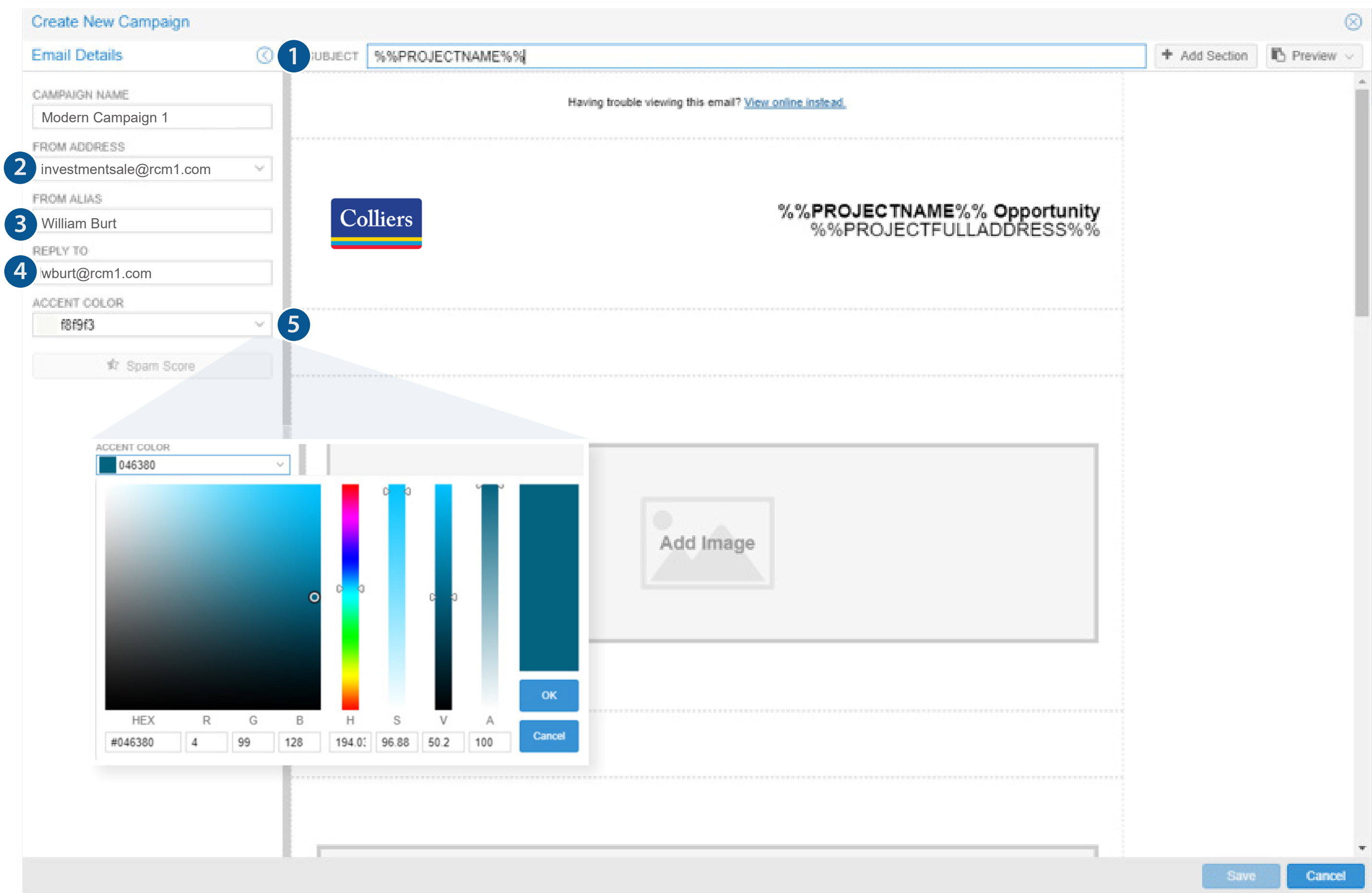
Setting Up Your Email

Once you have selected your template, setup is quick and simple.



Key

1. Add a brief and compelling Subject Line.
2. Select a From Address in the drop down.
3. Enter a From Alias - the name that will appear as the sender.
4. Enter a Reply To email address. This email address(es) will receive replies. Separate multiple email addresses with ";" and a space.
5. Choose an Accent Color by using the drop down color picker, or enter the Hex color code in the box below "HEX" if the template allows.

   NOTE: Accent color may have been preselected according to Colliers corporate brand standards. In this case, you will not be able to make changes.

Quick Tip: Avoid using spam words and excess punctuation (ex: Free,!!!) in your subject line for a greater open rate.

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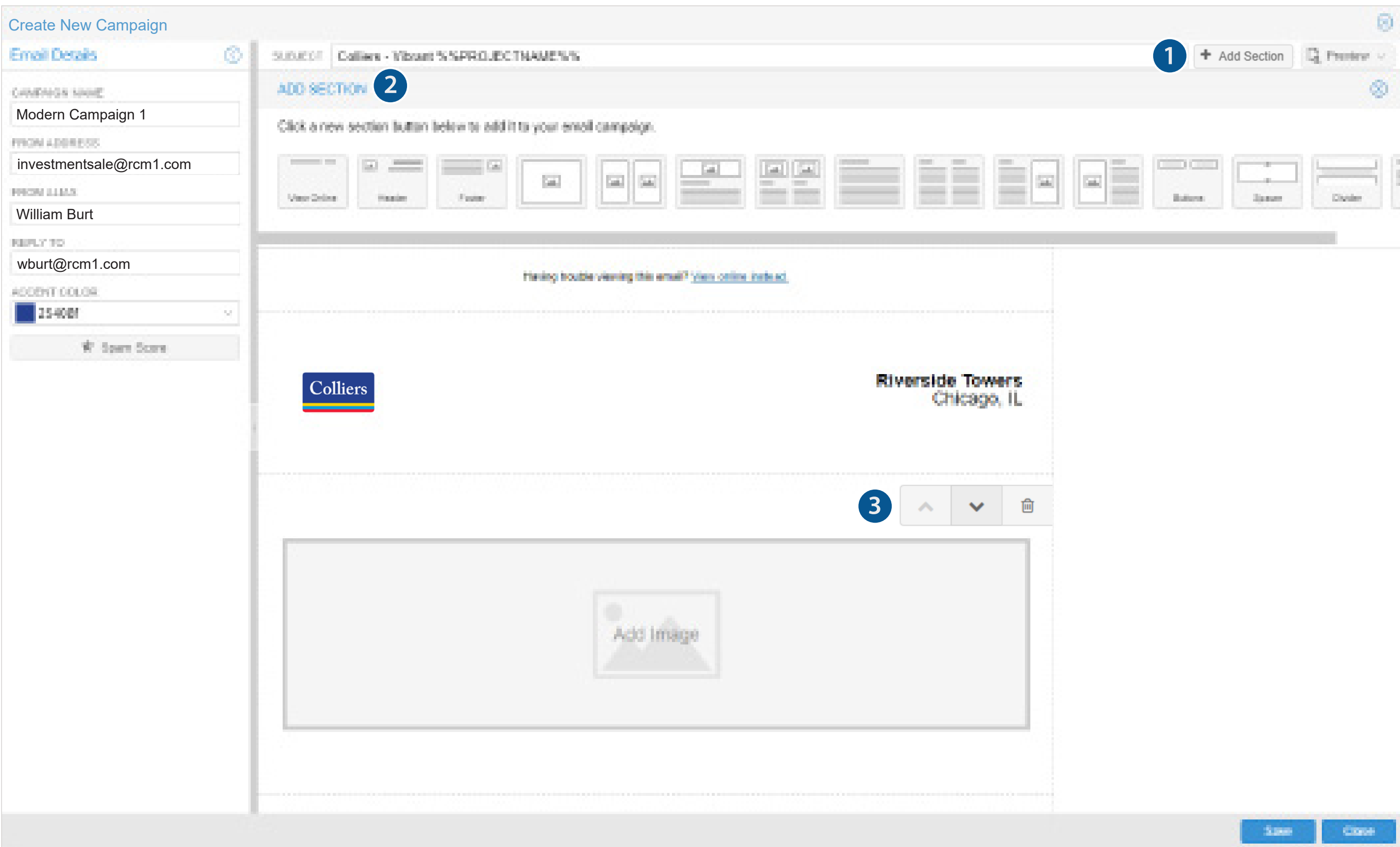
Laying Out Your Email

Add, move or remove sections to customize your email campaign layout.



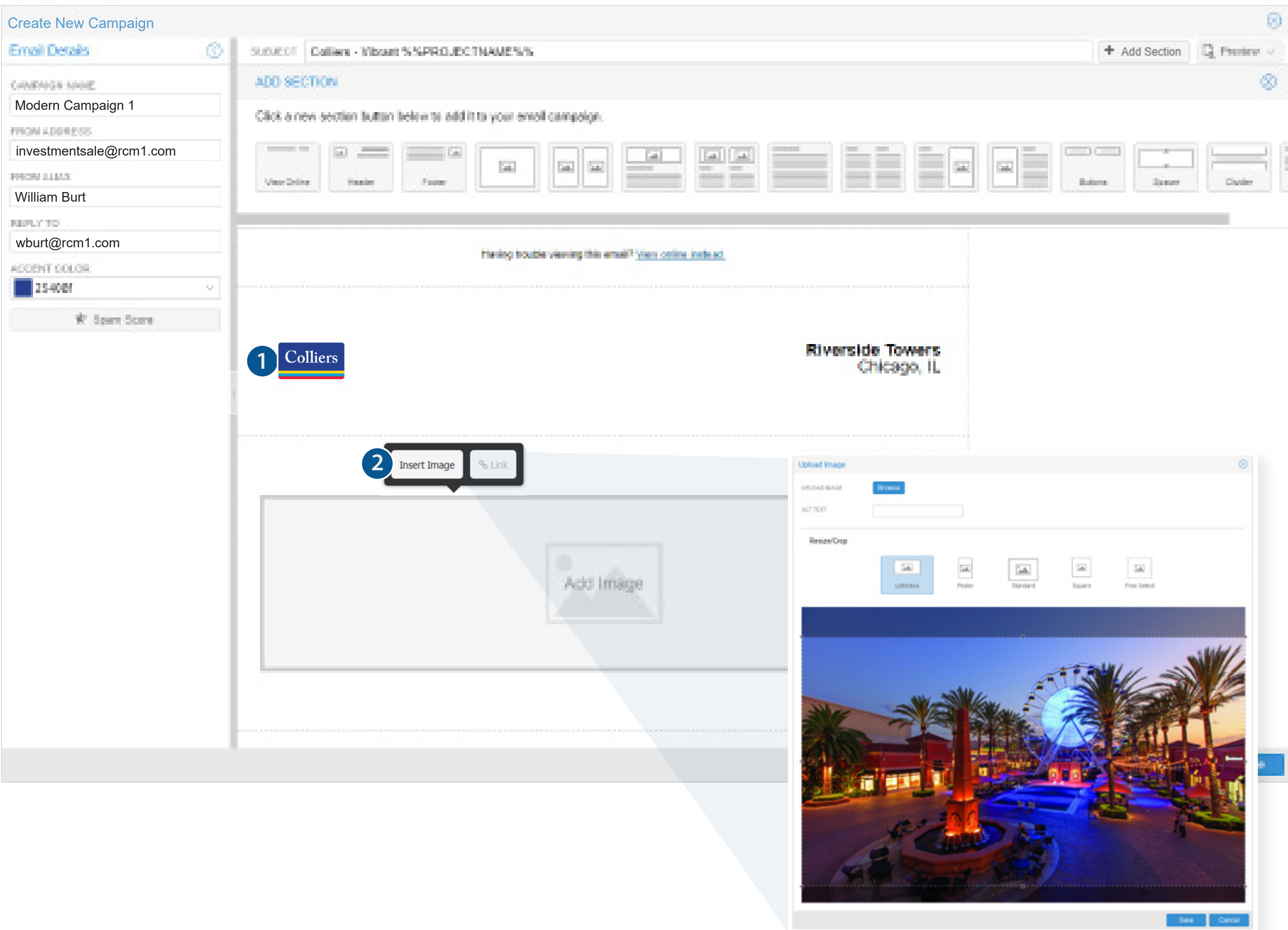
Key

1. Click Add Section to view available sections to add to your email.
2. Choose a section you'd like to add.
3. To move or remove sections, hover over the top of each section. Arrows and a trash can will appear.

Quick Tip: Your templates have preselected section layouts. These can easily be added, moved or deleted.

Logo and Images

Easily add or replace images within each section of the editor.



Key

1. Your logo has been preselected for your corporate templates. You will not be able to edit your logo.

2. Click any image placeholder within the email editor to add or replace images. Select a new image that is 1000px wide. Once image has been uploaded, use the embedded cropping tool to crop.

Quick Tip: Link any logo or image within your email by clicking on the link button, which appears when hovering over an image.

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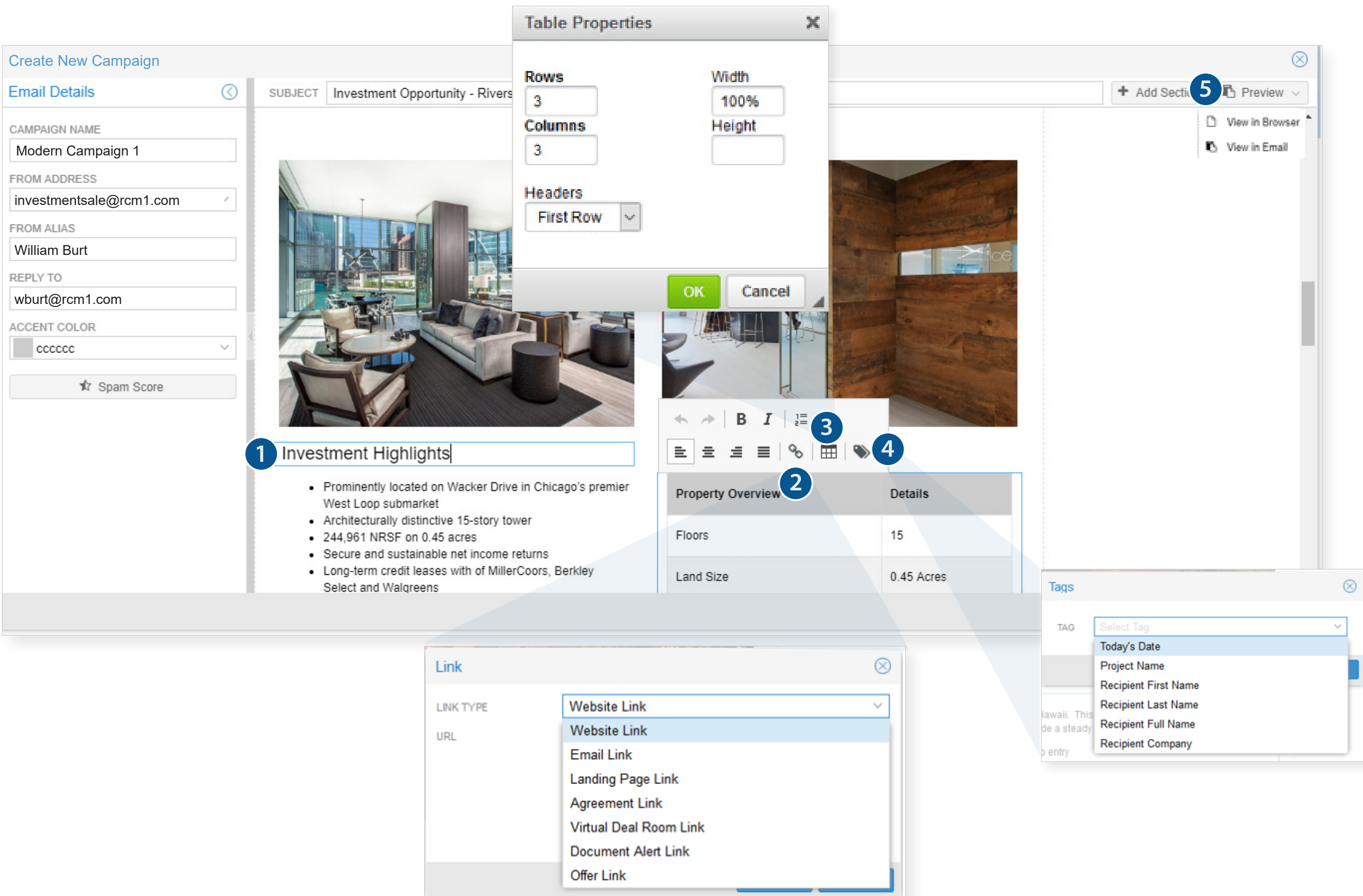
Customizing the Text of Your Email

Edit the text sections and personalize using the text editor, which allows you to bold, italicize, bullet, justify, add tables or link text.



Key

1. Add text and section headers by clicking in each section and typing directly in the editor.
2. Click on the link icon to hyperlink text.
3. Create tables that automatically adjust for the content entered and screen size.
4. Click on the tag icon to automatically pull in information such as the date, your project's name, recipient's name or recipient's company.
5. Preview the email in browser or send yourself a test. Test emails will be sent to the user who is logged into the platform.

   NOTE: Test emails are intended for those on your deal team, as they include test links and DO NOT provide any tracking, reporting, or security. Use Generic Links/Emails to send outside of team.

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Email Marketing Best Practices

Email is an extremely powerful and effective marketing technique when used correctly.
These best practices will allow you to create better emails that maximize deliverability and response rates.

> Use Short, Compelling Subject Lines

Subject lines determine whether an email is deleted, read or saved for later. Your subject line is competing with many other emails, tweets, and posts—limit it to 20 to 50 characters when possible.

> Keep It Brief

Good email marketing is succinct and offers valuable content.

> Do Not Use CAPITAL LETTERS or Excessive Punctuation Unnecessarily

Not only can this be viewed as unprofessional and difficult to read, but SPAM filters may send your message to the Junk Folder.

> Check For Misspellings

It is unprofessional and spammers often misspell words to get past filters.

> Limit or Avoid Common Spam Words

Free	Cash	Bonus	Amazing
%Off	Buy	Direct	Discounted
Mortgage	Debt	Hospital	Medical Product

> Schedule Your Email to Be Sent When Recipients Are Available

Send your emails during regular business hours—avoid sending on weekends or late in the evening.

Ensure your email looks great and professional with a mobile friendly email — All in just 15 minutes!

Virtual Deal Room Tab

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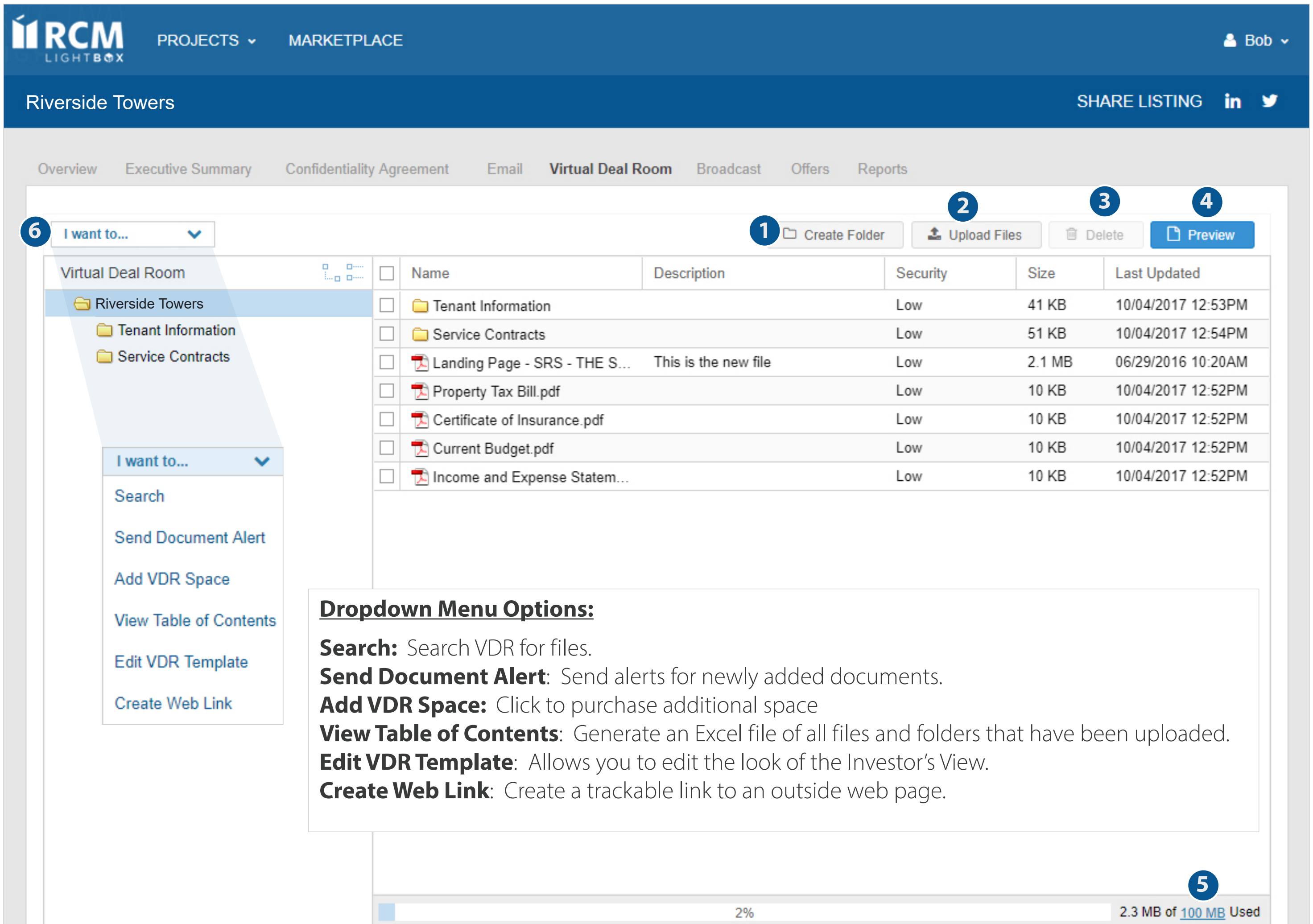
Virtual Deal Room (Administrative View)

The Virtual Deal Room (VDR) is a place where investors will view due diligence for the Project after executing the Confidentiality Agreement.

Create folders within the VDR and upload individual files or upload entire directories at once. Right-click files/folders to edit; double-click to rename. Reorder/move files using drag-and-drop. Most file types are supported. Set security levels on folders or files.



Dropdown Menu Options:

Search: Search VDR for files.
Send Document Alert: Send alerts for newly added documents.
Add VDR Space: Click to purchase additional space
View Table of Contents: Generate an Excel file of all files and folders that have been uploaded.
Edit VDR Template: Allows you to edit the look of the Investor's View.
Create Web Link: Create a trackable link to an outside web page.

Key

1. Click here to create folders.
2. Click here to upload single or multiple files, or drag and drop.
3. Click to remove selected files/folders.
4. Click to display the Investor's view.
5. Click to purchase additional space.
6. Click the dropdown menu to easily access commonly used features.

Quick Tip: You can use drag and drop to move files/folders to other folders or change the display order in the current folders.

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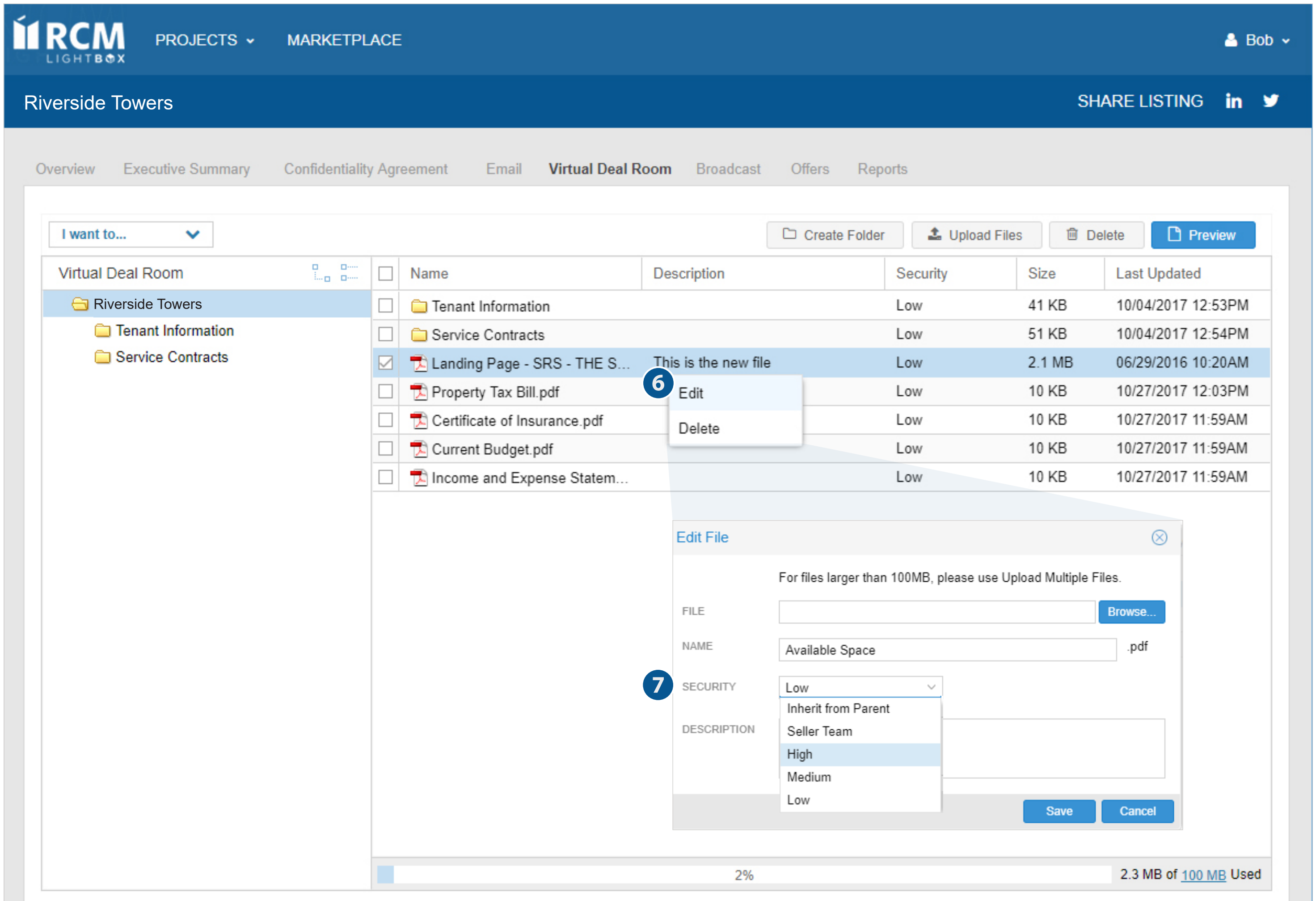
Virtual Deal Room (Administrative View cont'd)



Key

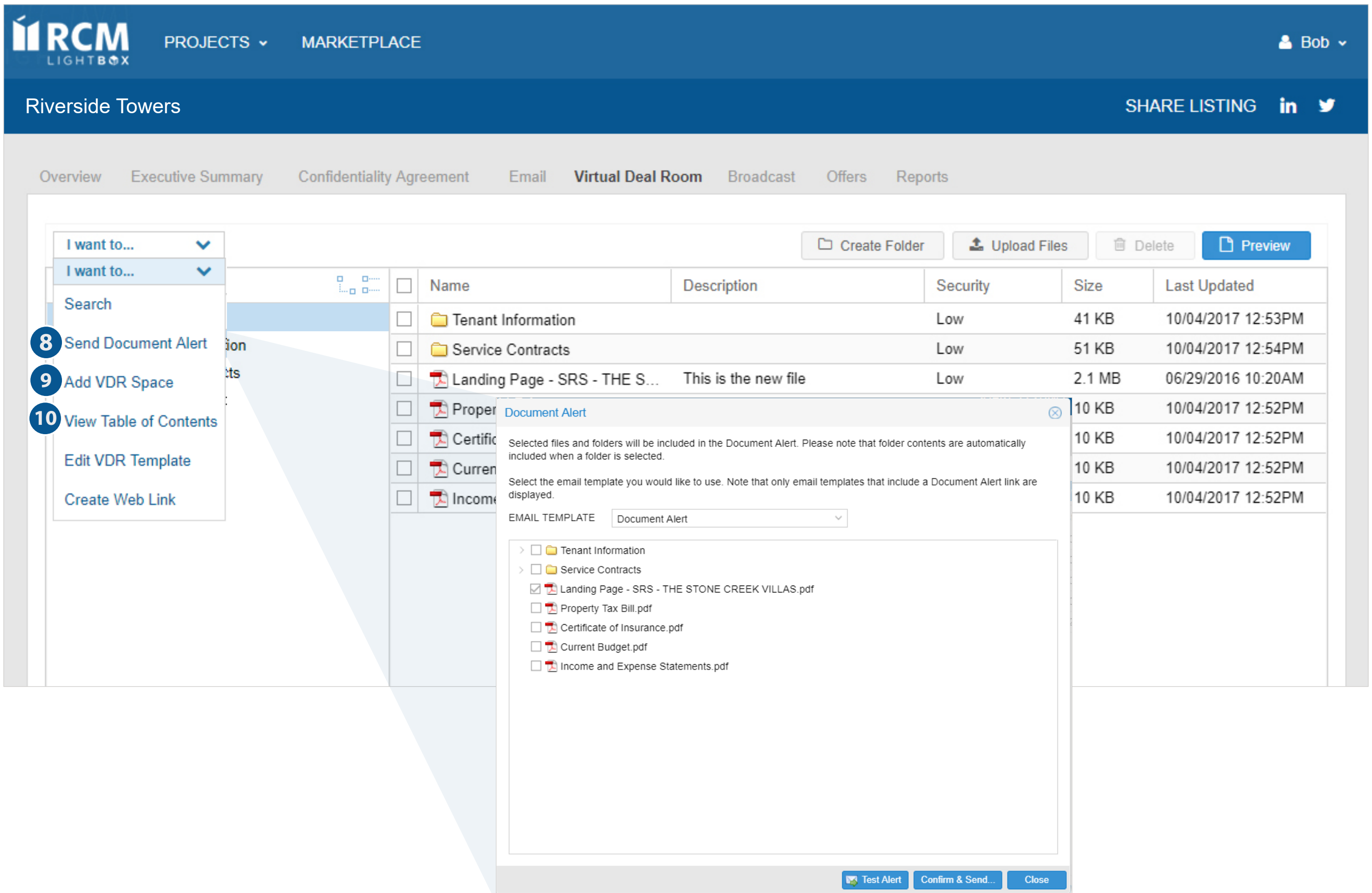
7. Right click on any file or folder to edit name, description, and security levels. For example, Low security files will be available to Investors whose security level is set to Low.

8. Change the file name or add a description.

NOTE:
OM and Argus are typically set to Low security and are available to Investors immediately upon executing your Confidentiality Agreement.

Quick Tip: You will want to limit your uploads to approximately 300-400 MB at a time, depending on your internet connection.

Virtual Deal Room (Administrative View cont'd)



Key

8 Notify Investors of newly added documents or folders using Document Alert. Select the Email Template, choose the file(s) or folder(s) you wish to alert them of, and click Confirm & Send. Only those Users with security permissions to those files/folders will receive the Alert Email.

9 Additional VDR space can be purchased with a credit card by clicking on the Add VDR Space link.

10 Download an excel file of all files/folders that includes security level and last updated date.

Quick Tip: After deleting files, you will need to remove files from Deleted Files to adjust your free space.

Offers Tab

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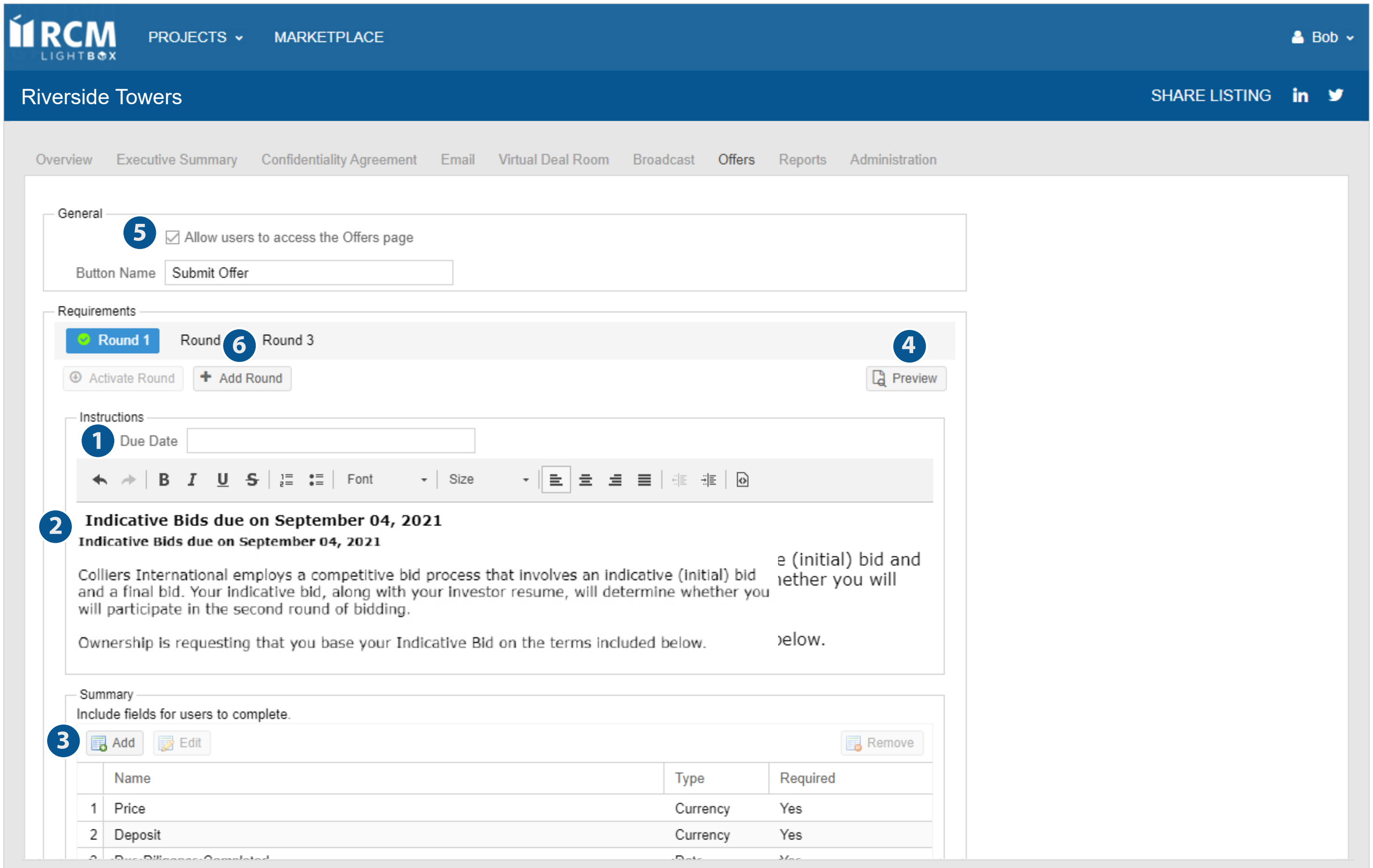
Offers (Administrative View)

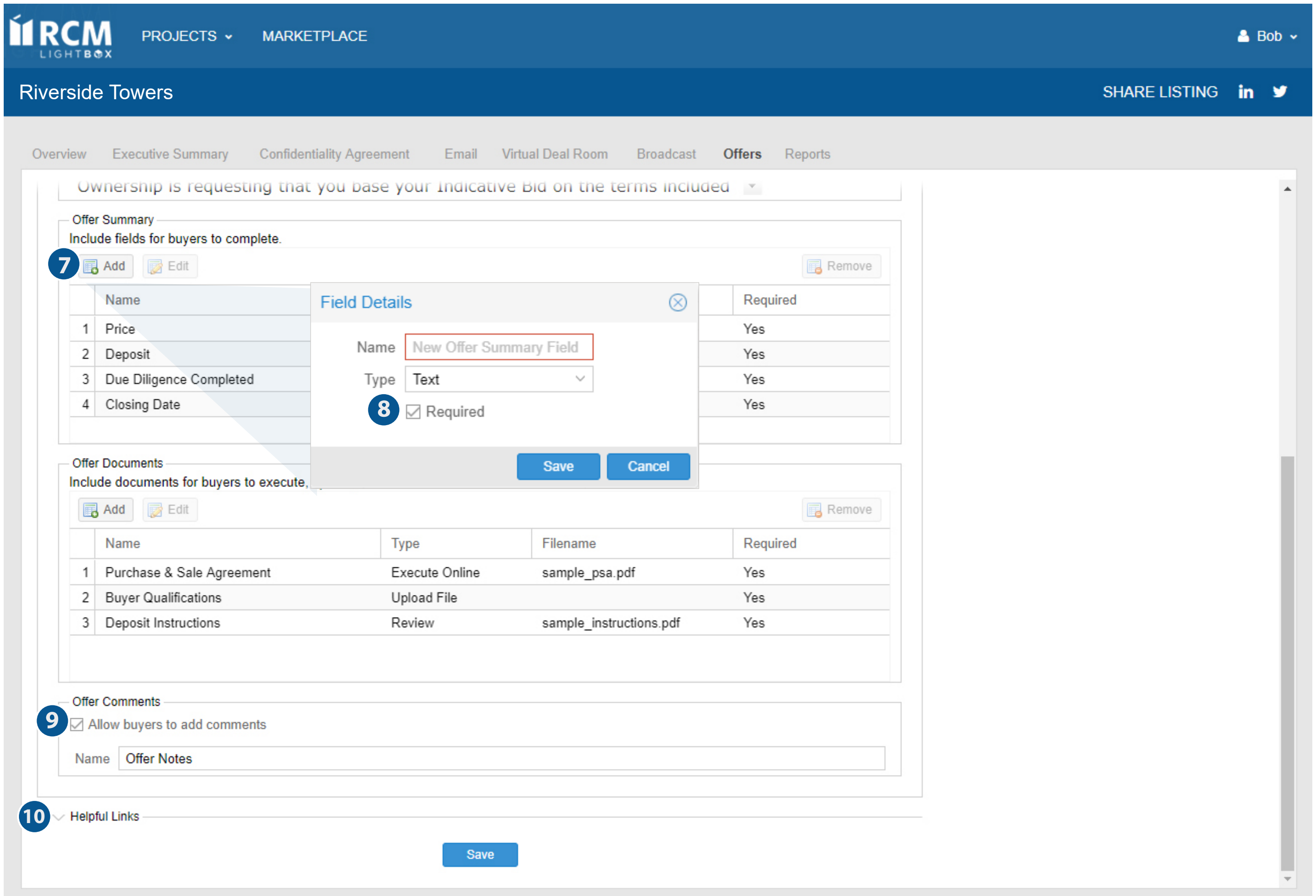
The Offers tab allows you to solicit and manage bids electronically by providing access to review bidding instructions, upload an offer/LOI, and submit an offer summary. Submitted offer information automatically creates a bid matrix available in Reports Tab.



Key

1. Enter the date your offers are due.
2. Add our offer instructions, which can be copied directly from your standard Call For Offers email.
3. Add, edit, or remove fields for buyers to complete or review and set required fields.
4. Click Preview to view the offer page as Investors will view it.
5. Check box to activate the Offers Page. Once Activated an Offers button will appear on the VDR, and can add a link to an email or landing page.
6. Create multiple rounds of online offers with separate offer requirements. Separate reporting for each round will be included in the Reporting/Offers tab.

Offers (Administrative View cont'd)

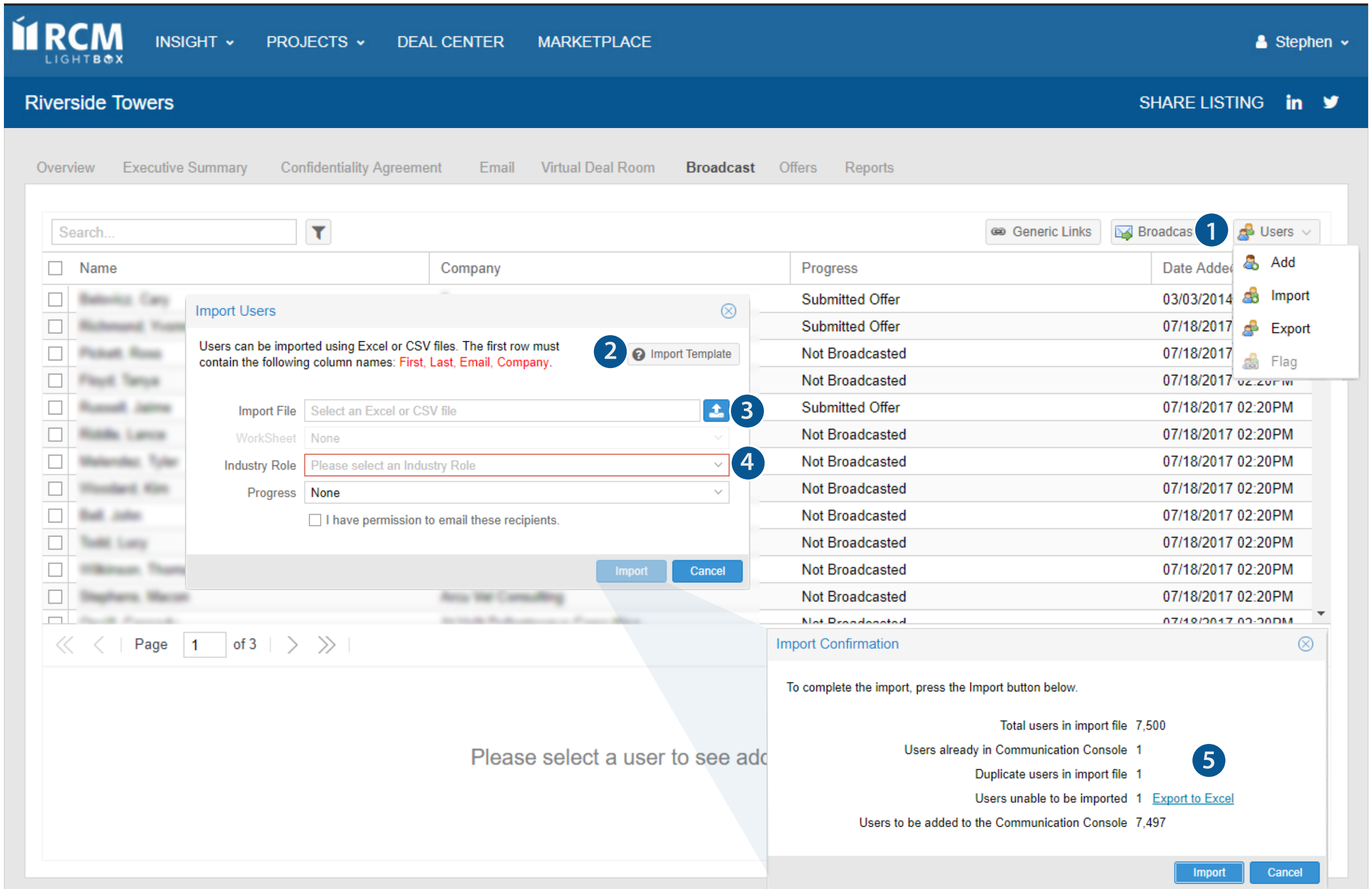


Key

7. Click Add to add new documents for users to execute, upload or review.
8. Determine which files, if any, are required to submit an offer.
9. Allow investors the option to include comments with their offer submission.
10. Include helpful links to websites or additional PDF documents that require no action.

Broadcast Tab

Broadcast (Adding/Importing Users)



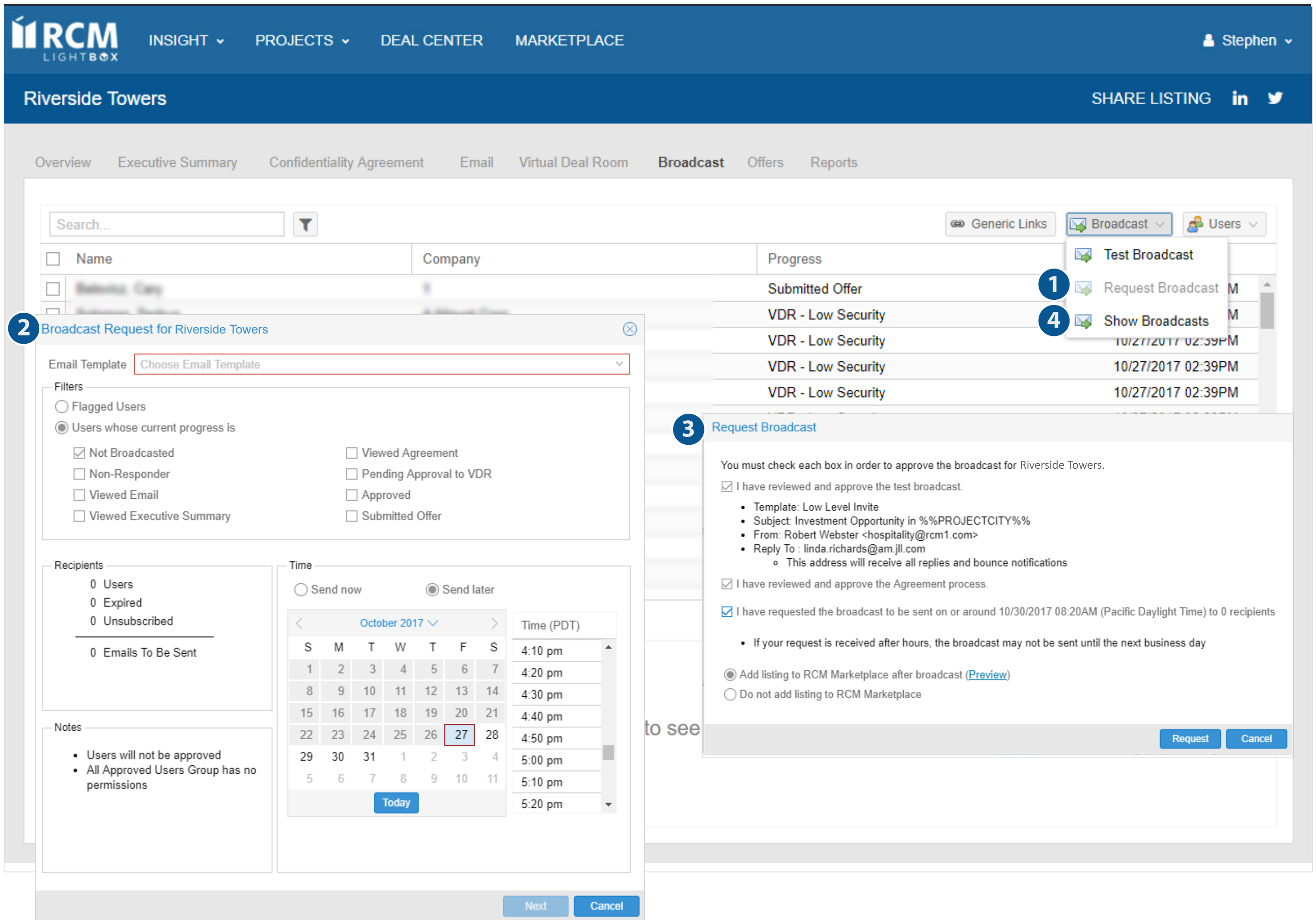
Key

1. To import multiple users, click Import on the User's drop-down.
2. Click the Import Template button for a template Excel file that includes additional columns that can be imported.
3. Click the upload icon and select your Excel or .csv file. The file must include the four required column headings, named exactly as shown.
4. Select the appropriate worksheet on your Excel file, the industry role of the users (Principal,Broker,etc.) and make sure progress is set to None. Choosing a progress level other than None (ex: VDR Docs - Medium) will import Users with that progress.
5. Review the Import Confirmation box to see the number of users in your file, the number who may already exist in the Broadcast tab, the number of duplicates in your file, the number of users unable to be imported and the number of users that will be added.

Quick Tip: Upload up to 8,000 unique buyer email addresses.

Back to TOC

Broadcast (Request Initial Broadcast)



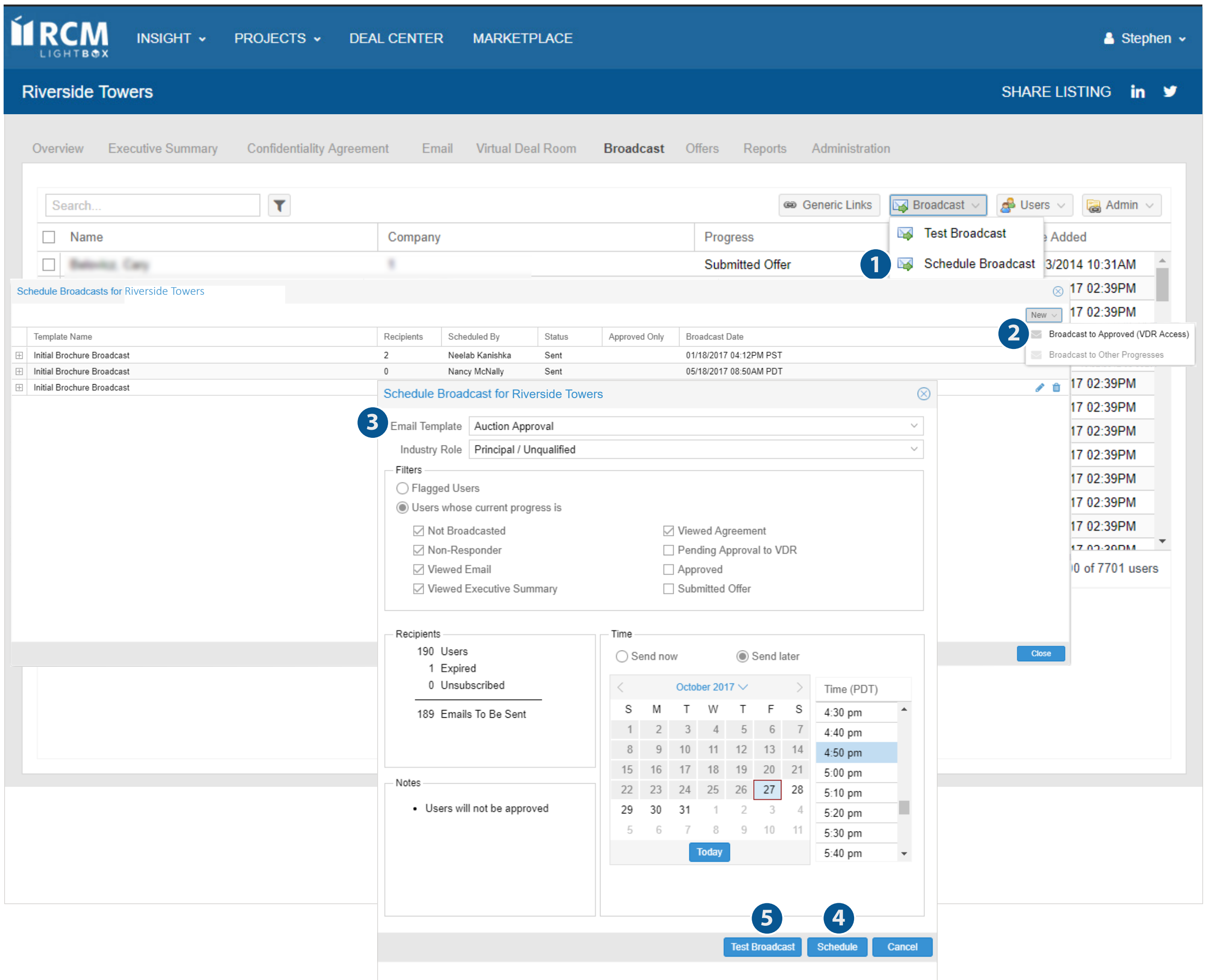
Key

1. Under Broadcast select Request Broadcast.
2. Select the email template, time and date you would like to schedule the initial broadcast.
3. Review the broadcast information and if accurate, click Request.

   NOTE: Once you select Request, the approval will be sent to your RCM account manager. Your account manager will schedule the broadcast based on the date/time requested.
4. Review sent & scheduled broadcast as well as delete a broadcast that has been scheduled for a future date/time.

Quick Tip: Interested in learning more about scheduling your own broadcasts? Contact clientservices@lightboxre.com or your Account Manager.

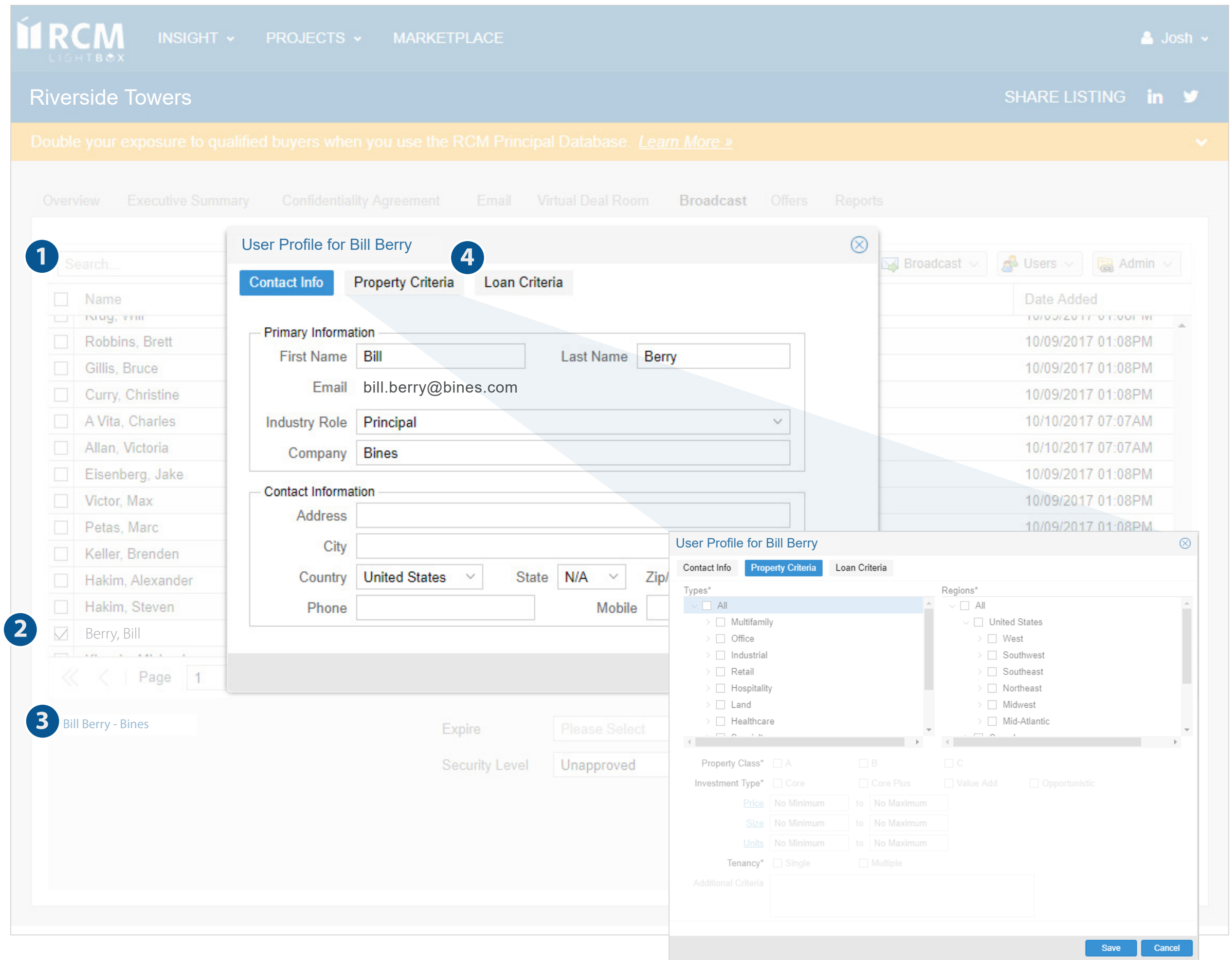
Broadcast (Schedule to Approved Users)



Key

1. Under Broadcast select Schedule Broadcast.
2. Click "New" and select Broadcast to Approved (VDR Access).
3. Select the Email template, time and date you would like to schedule the blast.
4. Click "Schedule".
5. You can still test the emails from this window by using the "Test Broadcast" option, but are not required to approve the broadcast.

Viewing & Editing a User Profile



Key

1. Search for the user. (You can search by a user's name, company, or full email address).
2. Check the box to select a user to update their information.
3. Click on the name/company hyperlink to access their User profile and edit.
4. Click property or loan criteria to view the Buyer's selected criteria.

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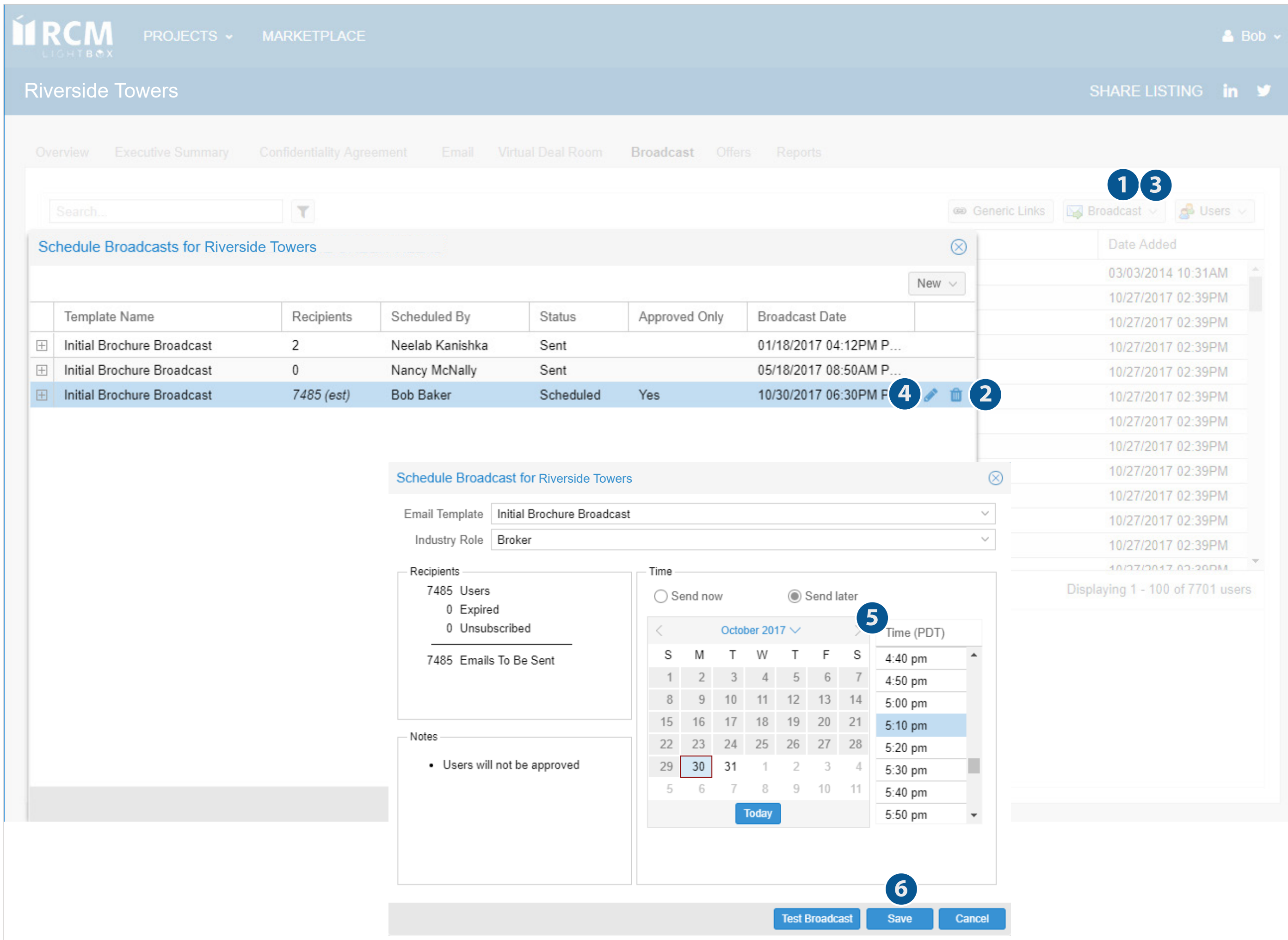
Broadcast (Cancel or Edit a Scheduled Broadcast)

For those who have been given permission to schedule broadcasts, you also have the ability to edit or cancel the scheduled broadcast.



Key

Cancel Broadcast

1. Under Broadcast select Schedule Broadcast.
2. Select the broadcast you wish to cancel and click trash can icon to remove.

   NOTE: You can only cancel broadcasts that have a status of Scheduled.

Edit Broadcast

3. Under Broadcast select Schedule Broadcast.
4. Click pencil icon to select the broadcast you wish to edit. Make your changes.
5. Re-select the date and time.
6. Click Save.

Questions?

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