Colliers
SalesTracker
Powered by RCM LightBox

RCM LIGHTBOX

inSIGHT Manual

A Guideline for Navigating the inSIGHT platform

2021 Edition

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inSIGHT Dashboard

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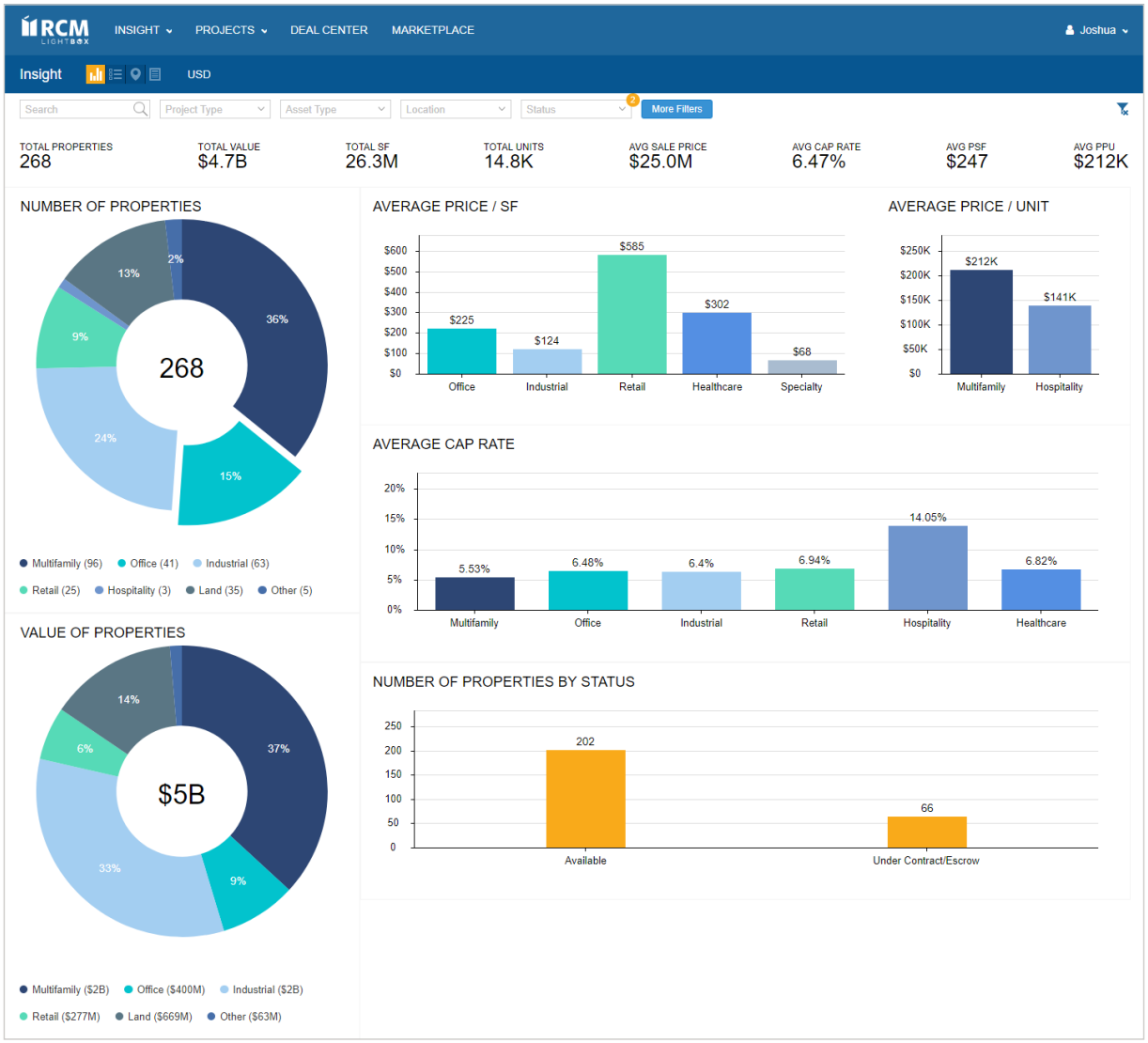
inSIGHT Dashboard

Upon Logging into SalesTracker on the RCM LightBox platform, you will land on the inSIGHT Dashboard.
This view provides digitized firm-level data and allows you to filter, compare, visualize, and analyze all on one screen



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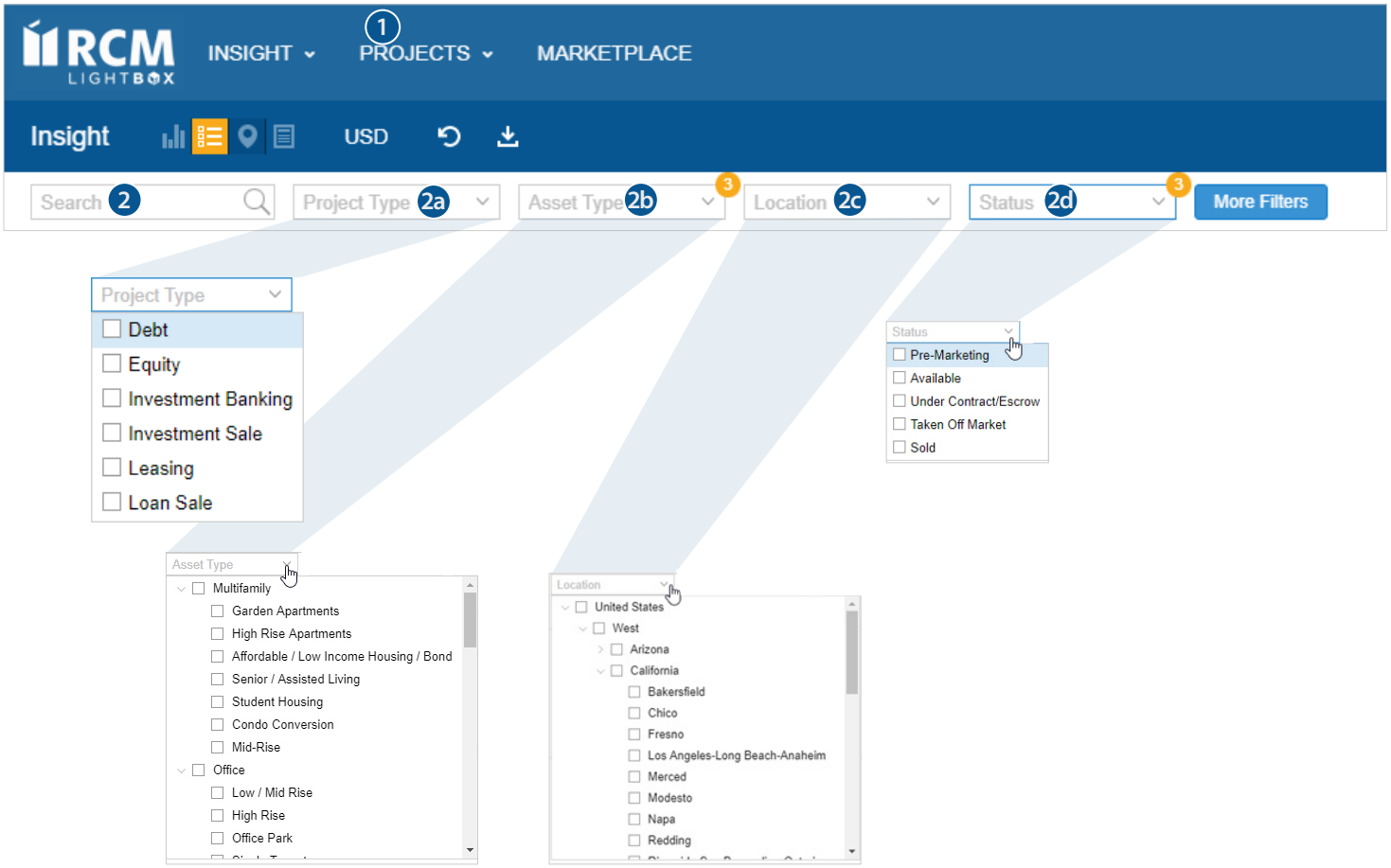
Filters

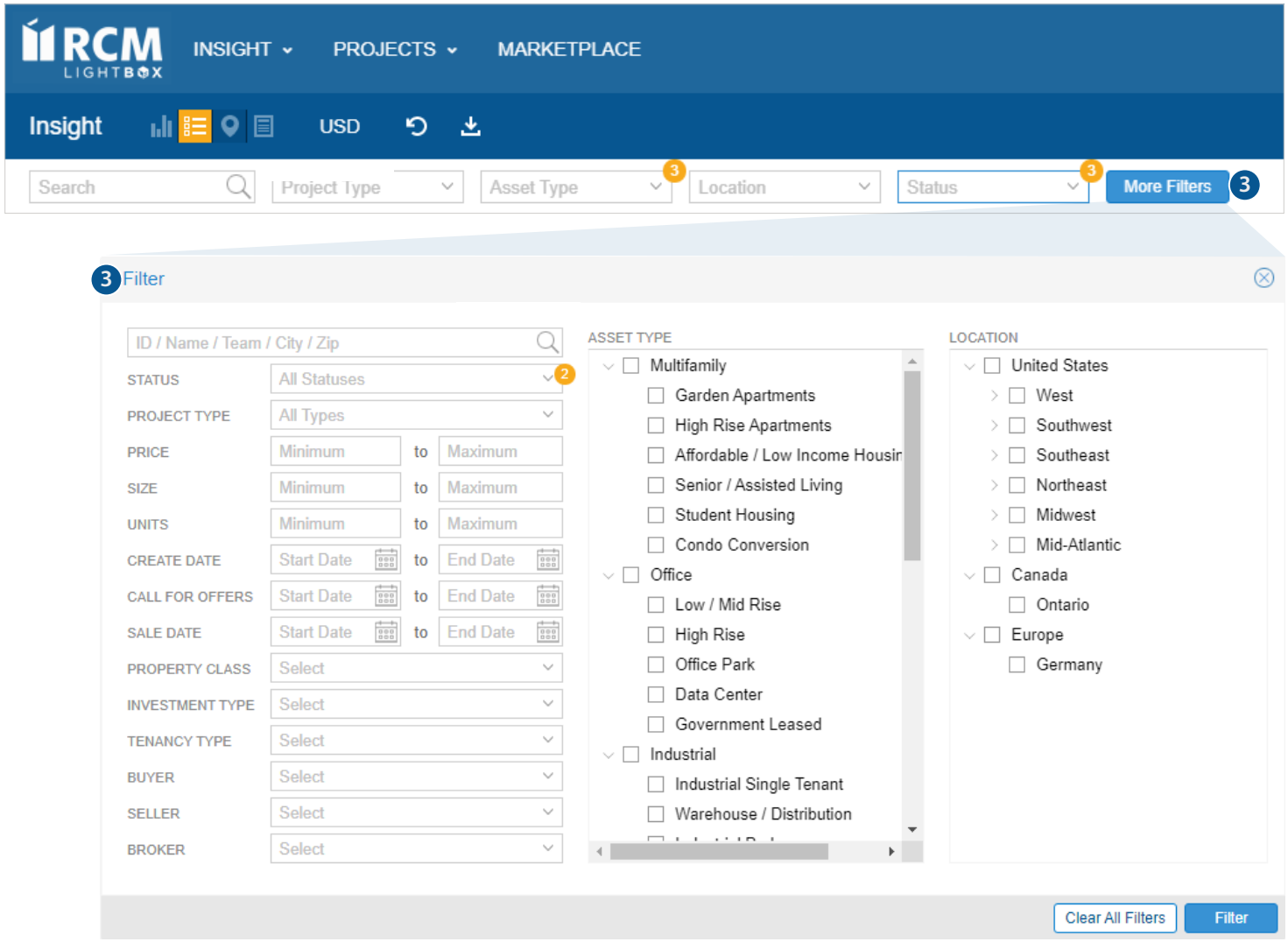
Filters



Key

1. Locating a project managed by your team:
2. Search for a project within inSIGHT based on name, ID or location
   - 2a Filter based on a specific project type
   - 2b Filter for a specific asset or sub-type
   - 2c Filter by region, state or MSA
   - 2d Filter by status:
     - > Pre-Marketing or Taken Off Market (only available for projects you manage)
     - > Available, Under Contract, or Sold (available for all projects)

Filters



Key

3 More filters - drill down to view specific information

a. Filter by date

b. Filter by buyer

c. Filter by Tenancy Type

inSIGHT List View

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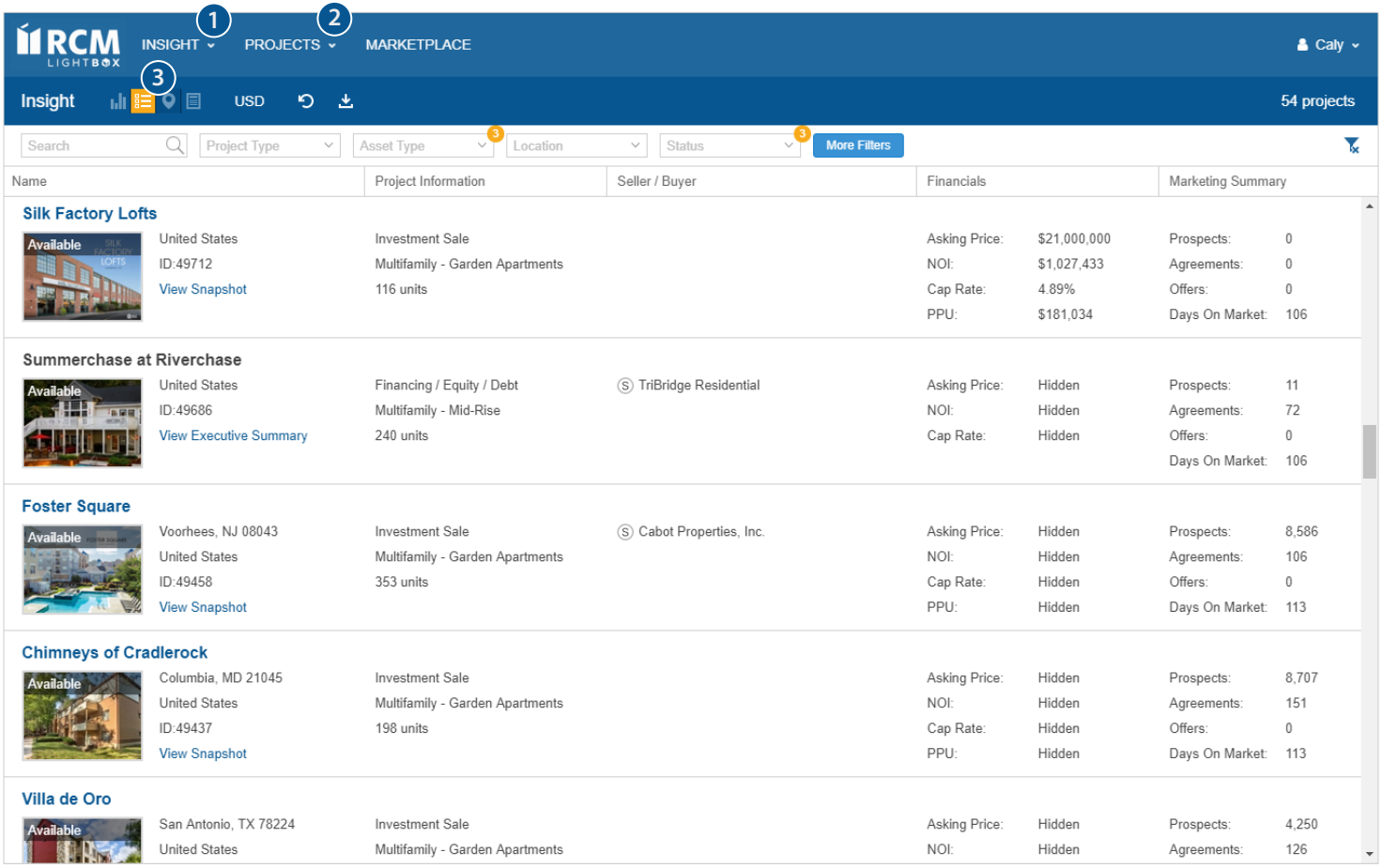
inSIGHT List View

inSIGHT list view allows you to view all properties throughout **Colliers**. Your default view allows you to see anything that you manage that is in a Pre-Marketing status, all Available and Under Contract projects.



Key

1. inSIGHT drop down allows access to:
   a. All projects
   b. Active projects that are in the market
   c. Sold projects
   d. Company Scorecard shows investor engagement over time for all assets bought, sold, and offered along with other relevant company activity
2. Projects drop down allows access to 'My Projects', 'Create Project' and displays your 10 most recent projects
3. View properties in a list view (default) or select the map view where you can also see property information by clicking the map pin

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inSIGHT List View

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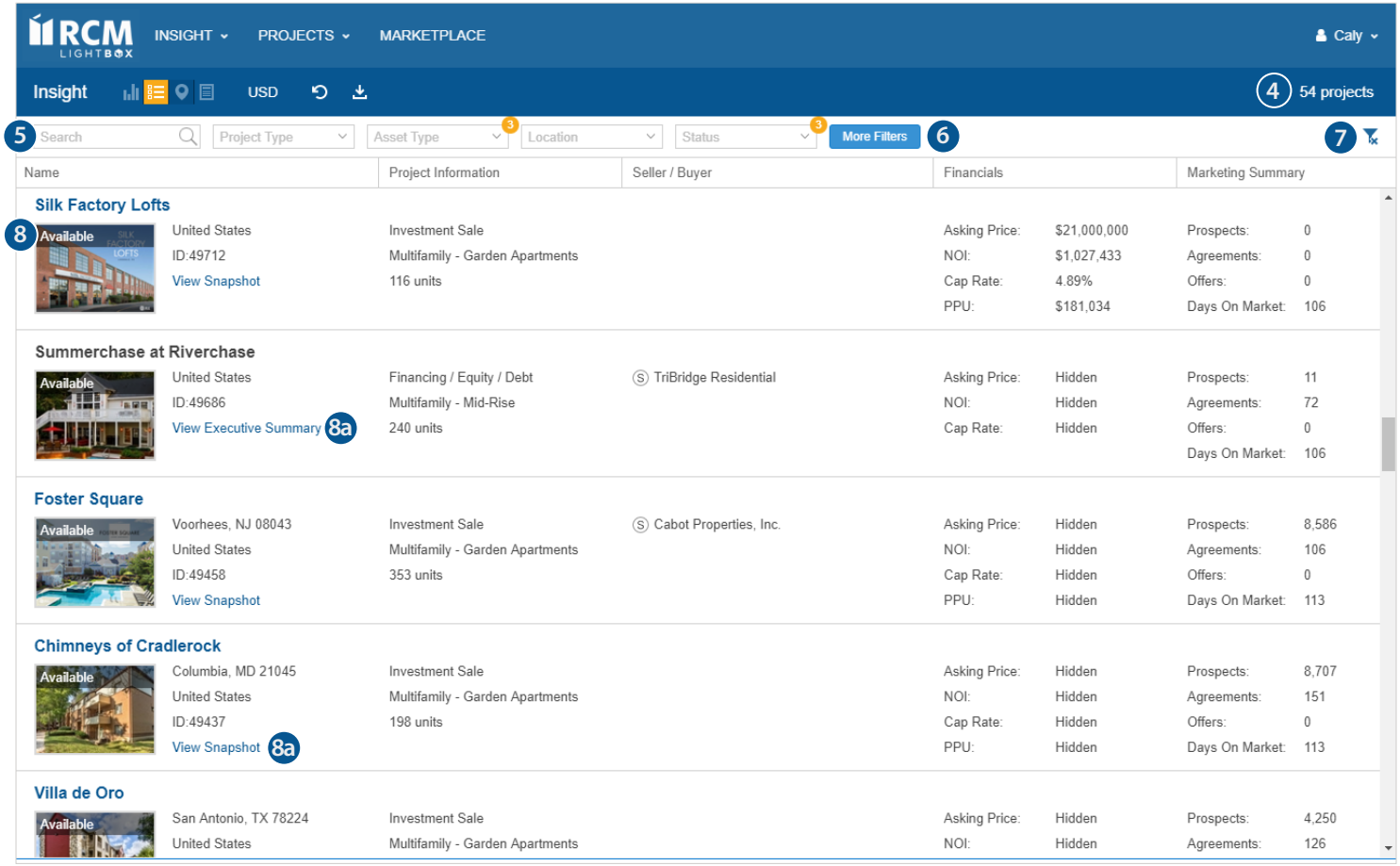


Key

4. The number of projects displayed will be based on your filter selections

5. Search allows you to find a particular project by typing in the project name, ID, location, or use the filters to search for specific properties based on project type, asset type, location or the status

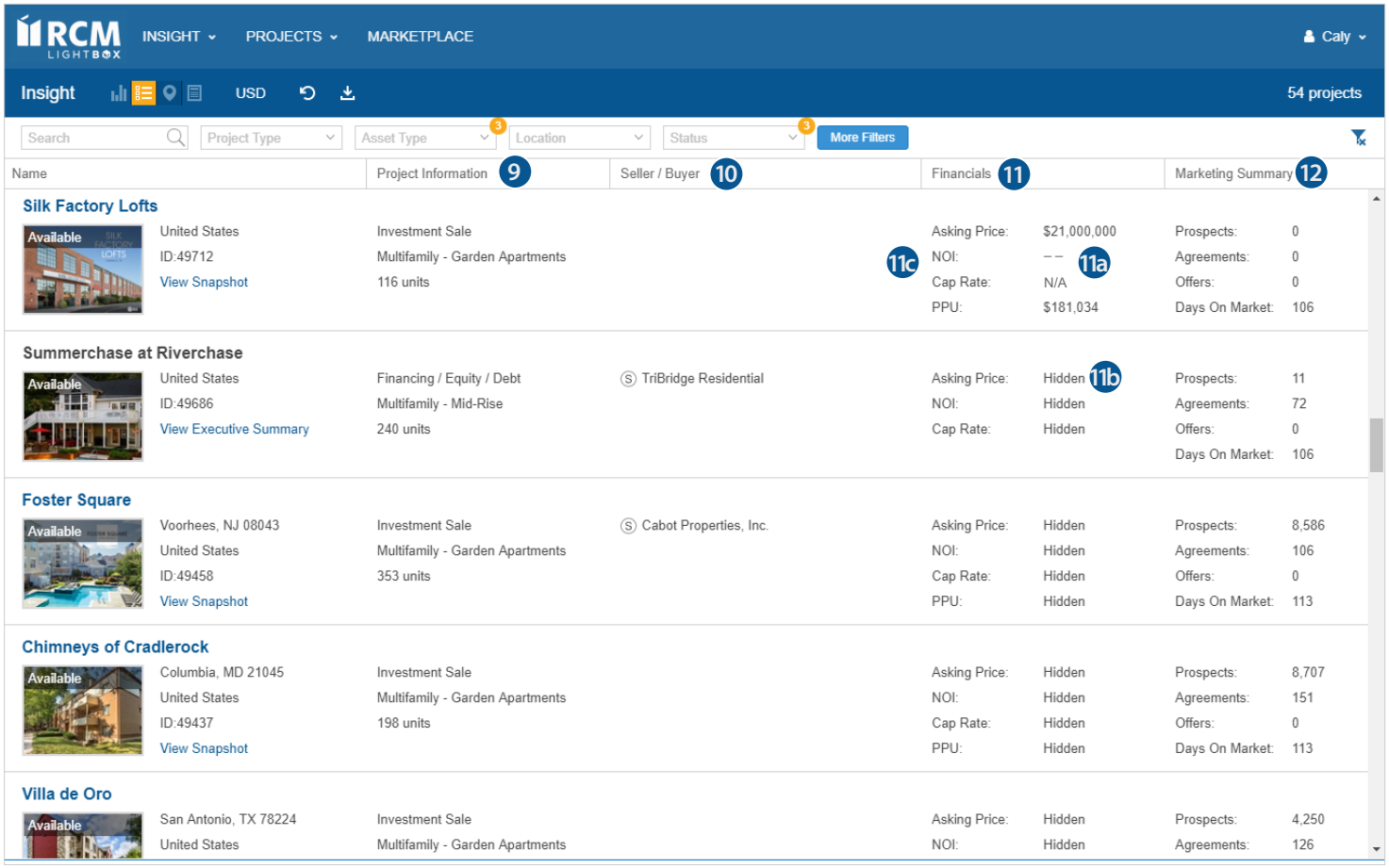
6. More Filters allows you to expand your search criteria (see page 7 for more information)

7. Clear all filters option allows you go back and display all properties

8. Users are able to see the projects that have the status of:
   - 8a. Available – access to the executive summary for all projects; Snapshot for projects you manage
   - b. Under Contract - access to the executive summary for all projects
   - c. Sold - access to the executive summary for all projects
   - d. Pre-Marketing – only accessible if you manage the property
     - Access to property Snapshot
   - e. Taken off Market – only accessible if you manage the property

inSIGHT List View

(continued)



Key

9 View available project information that is added by the listing team

a. Project type
b. Asset Type
c. Size

10 View the Seller and/or Buyer of the property

11 Financials - if set to display by listing broker, otherwise field will be shown as "Hidden"

11a If the NOI is not added on the individual project, the NOI is displayed as "- -" and the Cap Rate will not be calculated (instead you will see N/A)

11b Listing broker can decide whether or not to display financial information. If they do not choose to display, it will appear hidden on projects that you do not manage

11c All financial information is available to you if you manage the project

12 Marketing Summary

a. Number of prospects included in the initial marketing effort
b. Number of executed agreements
c. Number of offers made
d. Number of days on the market

Company Scorecard (AKA Balance of Trade)

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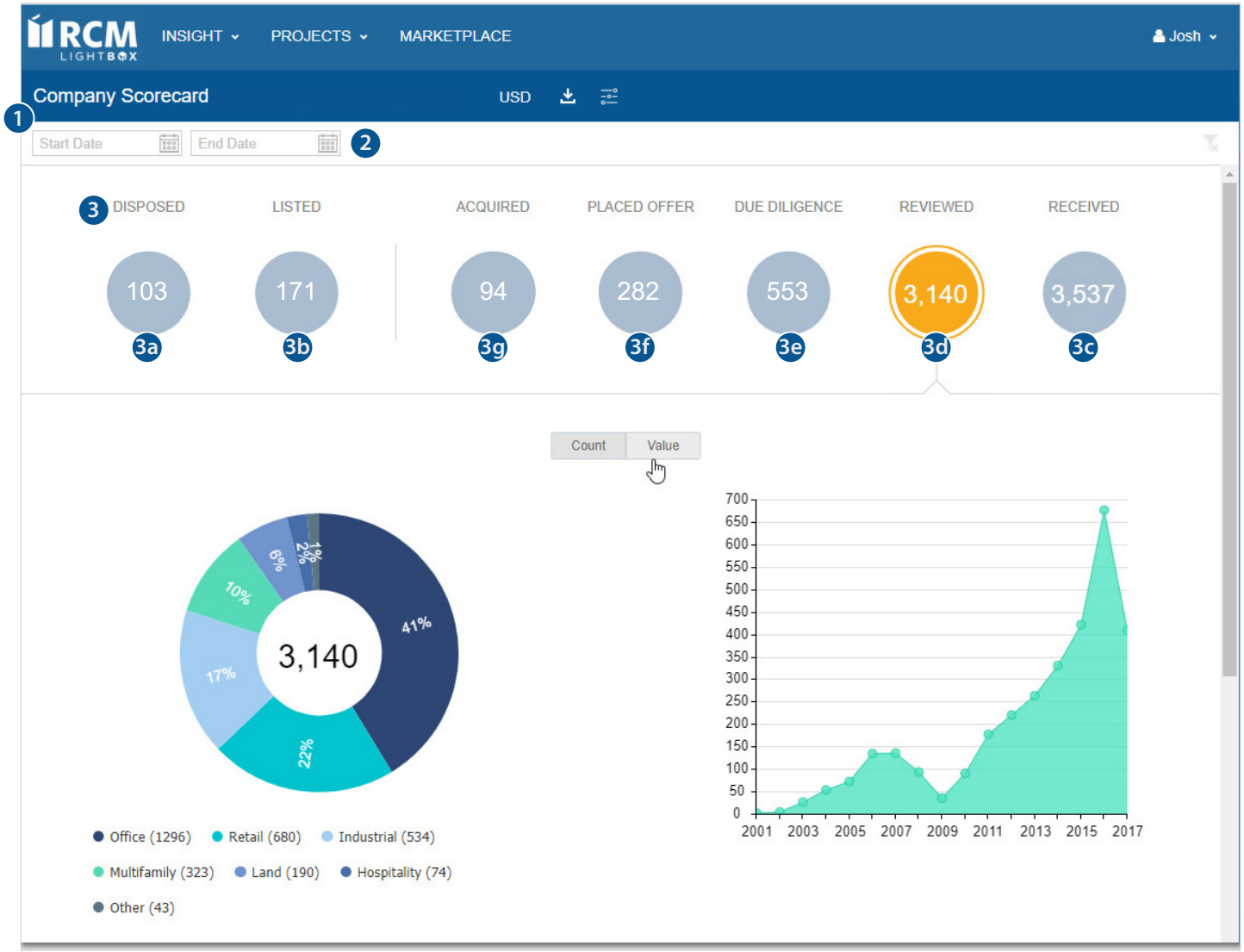
Company Scorecard

To access the Company Scorecard, click on the inSIGHT drop down and select the Company Scorecard. Type a company name into the search field and hit enter. The number of users included under this company is also displayed. Click the company you want to view.



Key

1. Name of company you are reviewing, currency converter, ability to export a full list of assets included in your selection, and ability to filter by company activity
2. Set a specific date range with a start and end date
3. Company activity:
   - 3a Disposed - Projects where company was seller and status is sold
   - 3b Listed - Projects where company was seller, regardless of status
   - 3c Received - Projects where company was sent email
   - 3d Reviewed - Projects where company viewed email or executive summary
   - 3e Due Diligence - Projects where company downloaded documents
   - 3f Placed Offer - Projects where company submitted an offer
   - 3g Acquired - Projects where company was buyer

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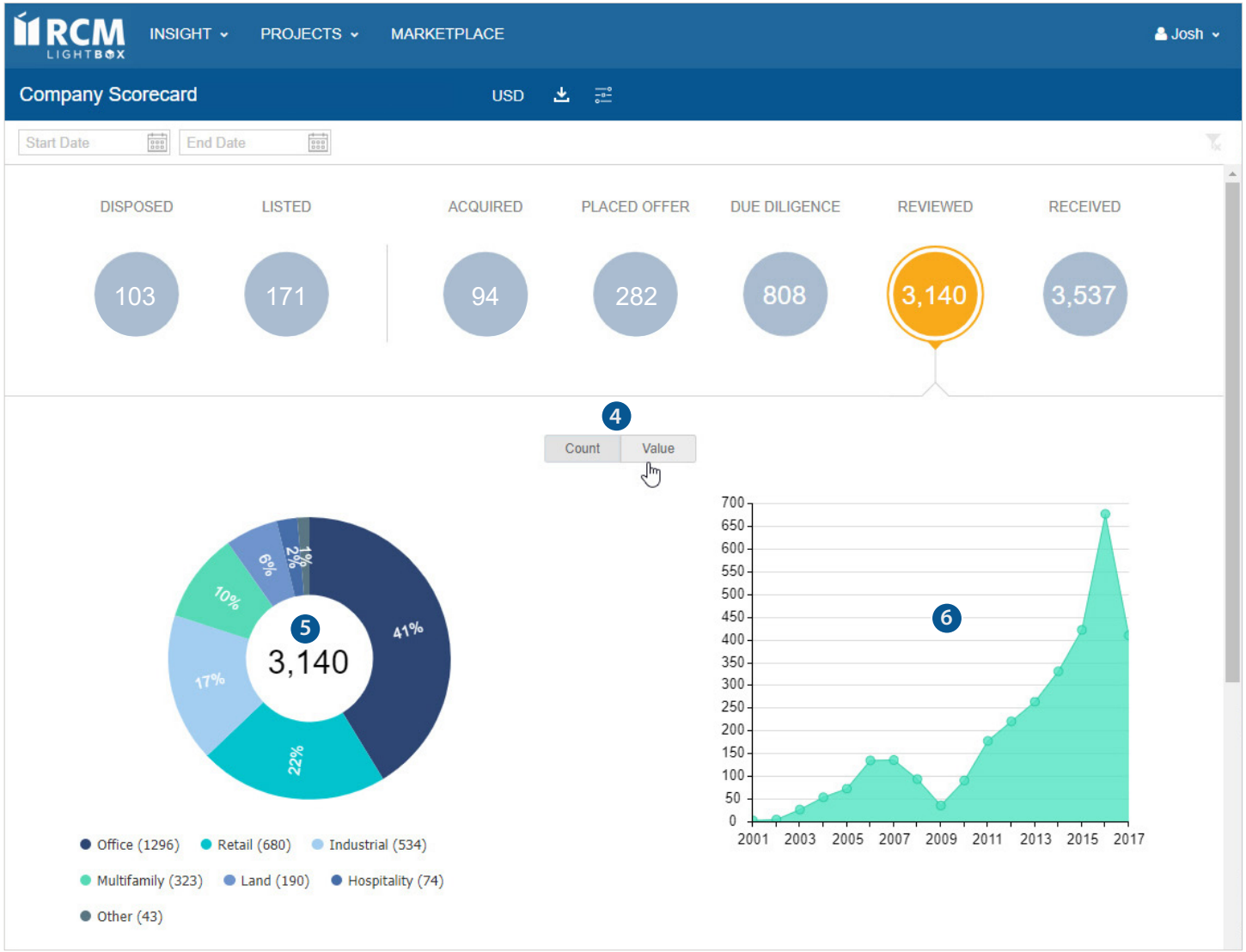
Company Scorecard

(continued)

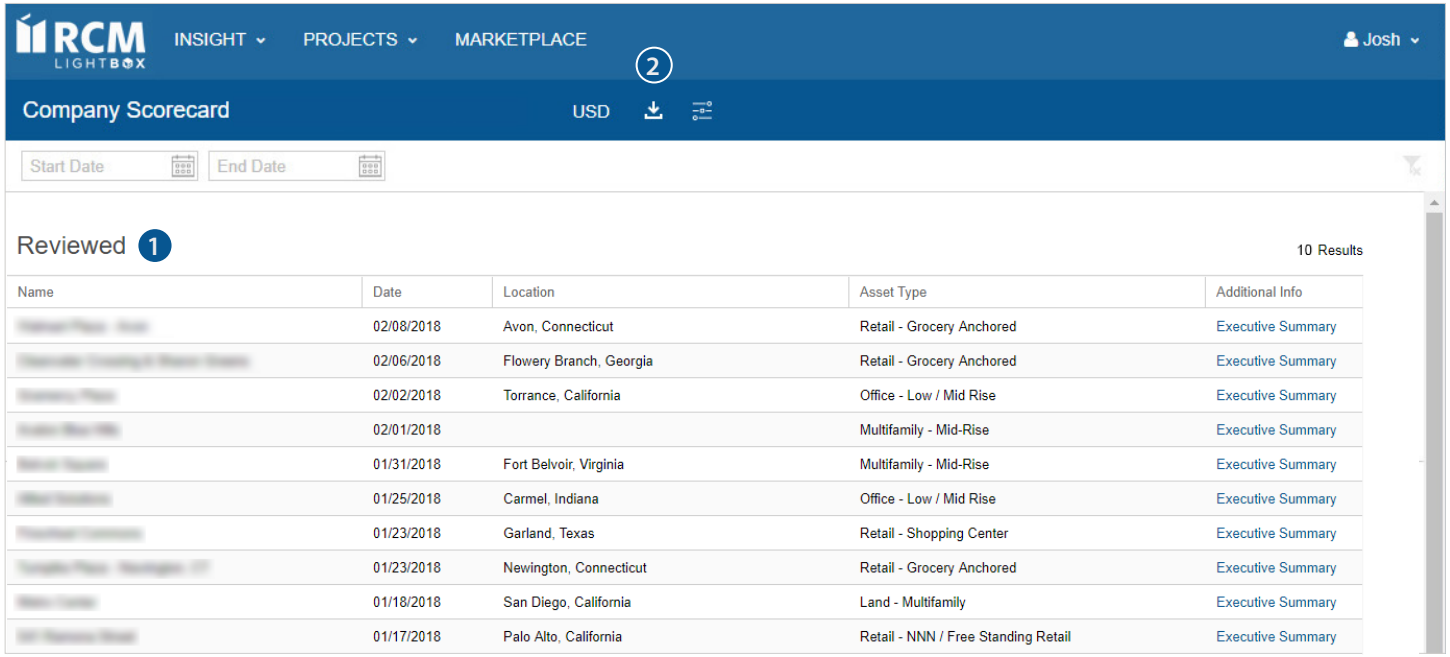


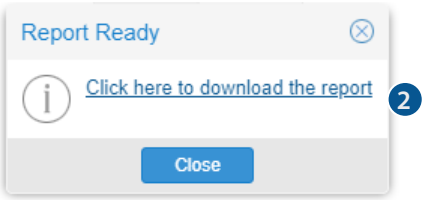
Key

4. Choose to view as a count or value
5. Chart displaying percentage of asset types in specified date range
6. Graph displaying number of assets for the selected action in specified date range

Company Scorecard

(continued)





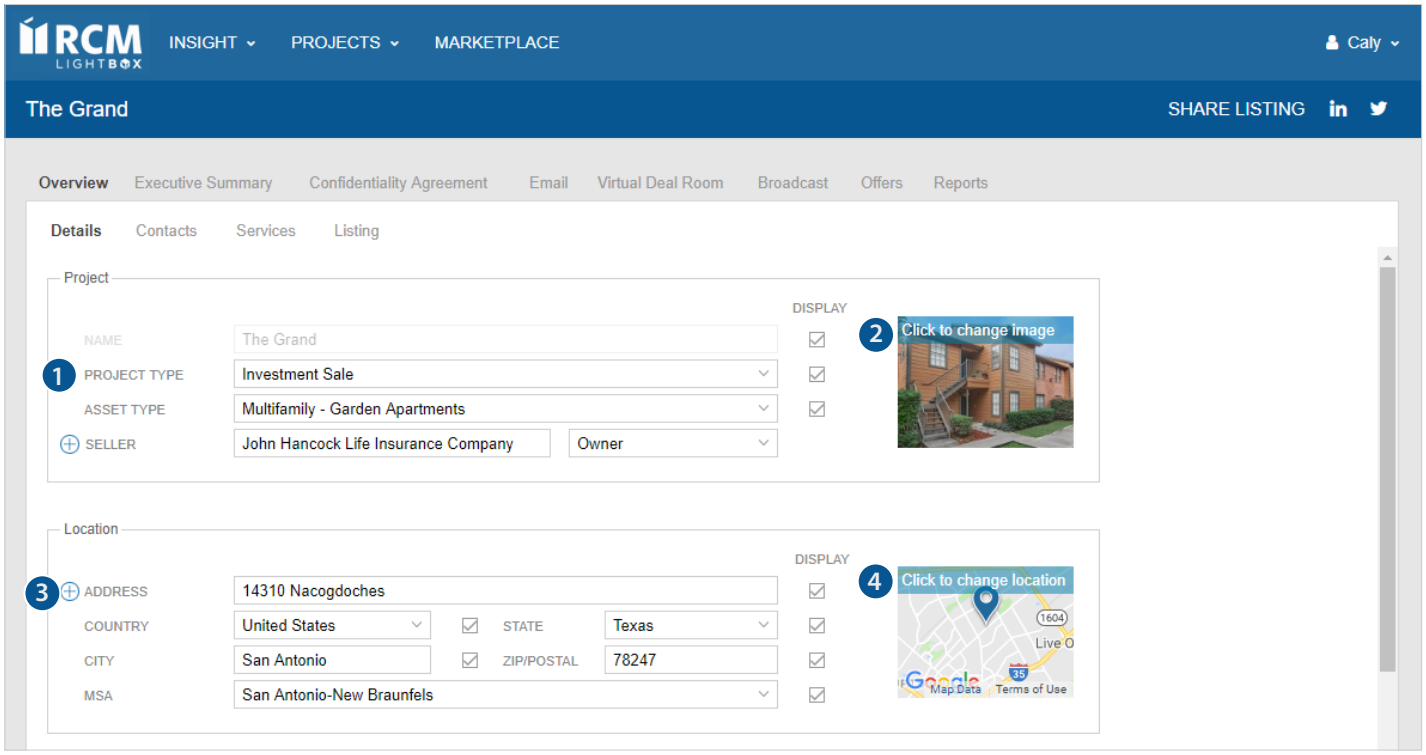
Key

1. View the assets matching the selected action and date range
2. Download data into a spreadsheet

Listing Engine Requirements

Listing Engine Requirements

Verify that these fields are completed prior to adding your property to **sales.colliers.com** and the RCM LightBox Marketplace.

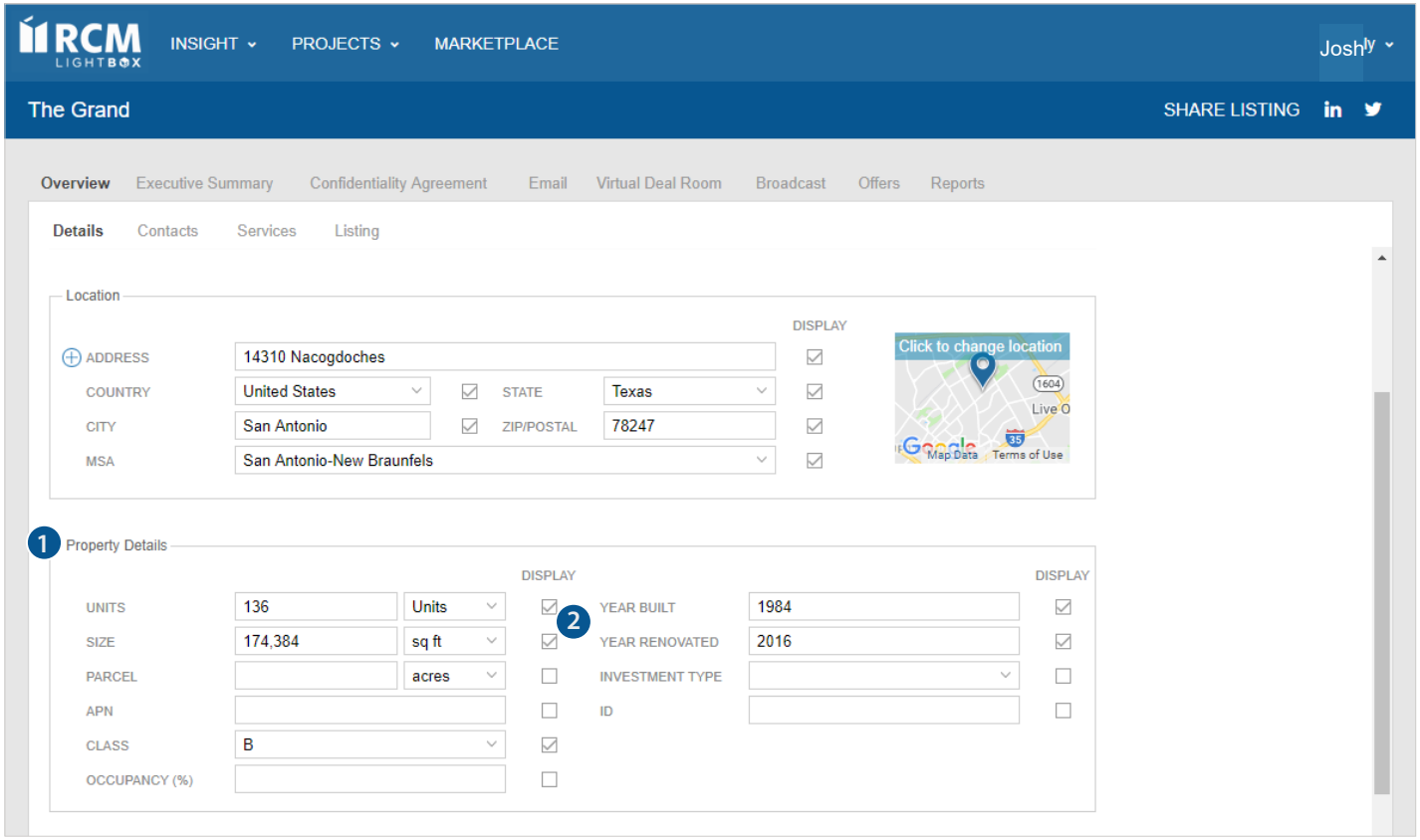


Key

1. Verify the Asset Type is correct
2. Add a primary image to display on the engine
3. Add the address(es), click on the + sign to add multiple addresses
4. Click on the map thumbnail to verify the location is pinned correctly. If not, move the pin to the correct location and click save.

Listing Engine Requirements

(continued)

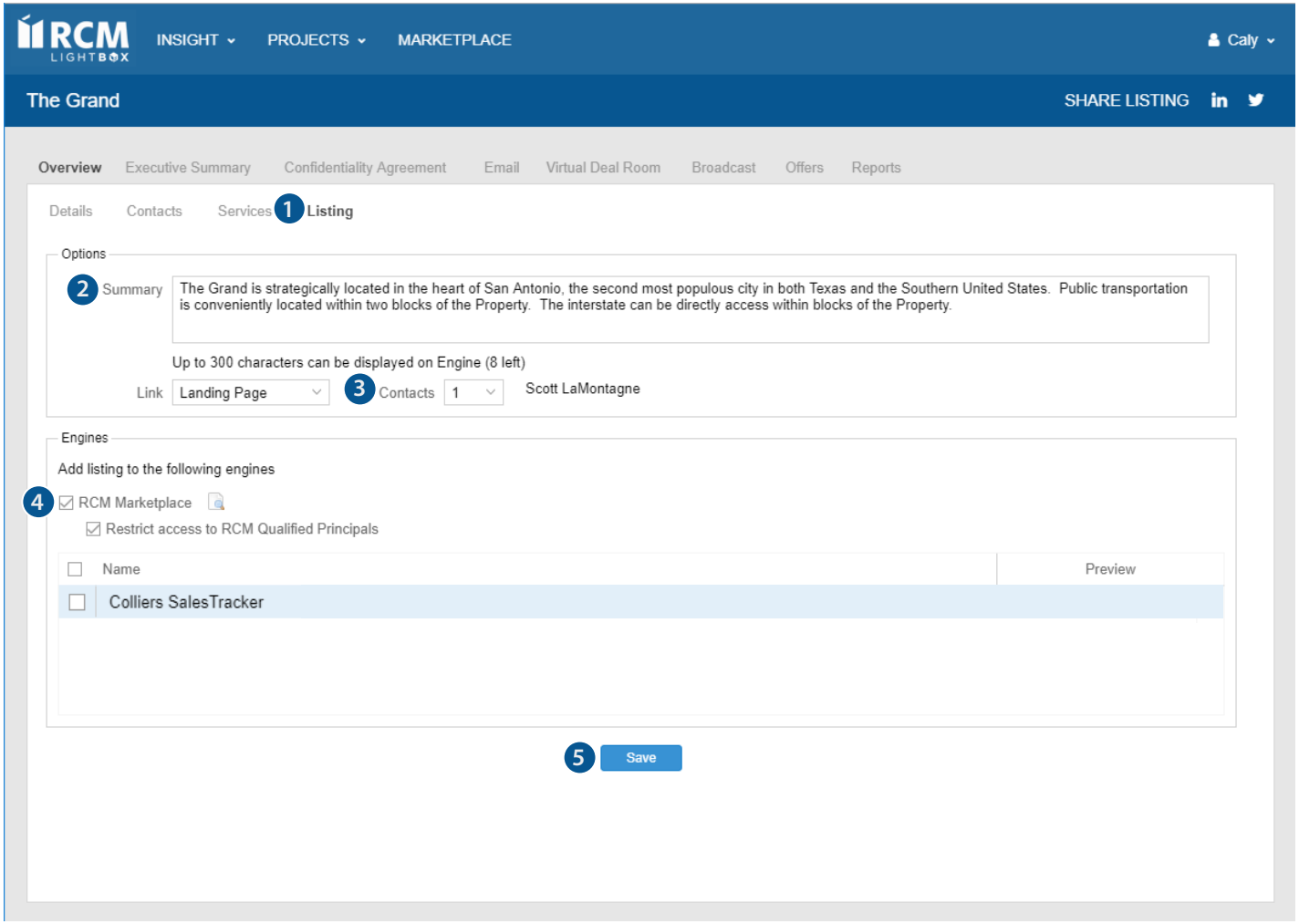


Key

1. Add the appropriate property details
2. Check/uncheck the display box to choose to have this information displayed or hidden

Listing Engine Requirements

Use these steps to add a property to **sales.colliers.com** and the RCM LightBox Marketplace.

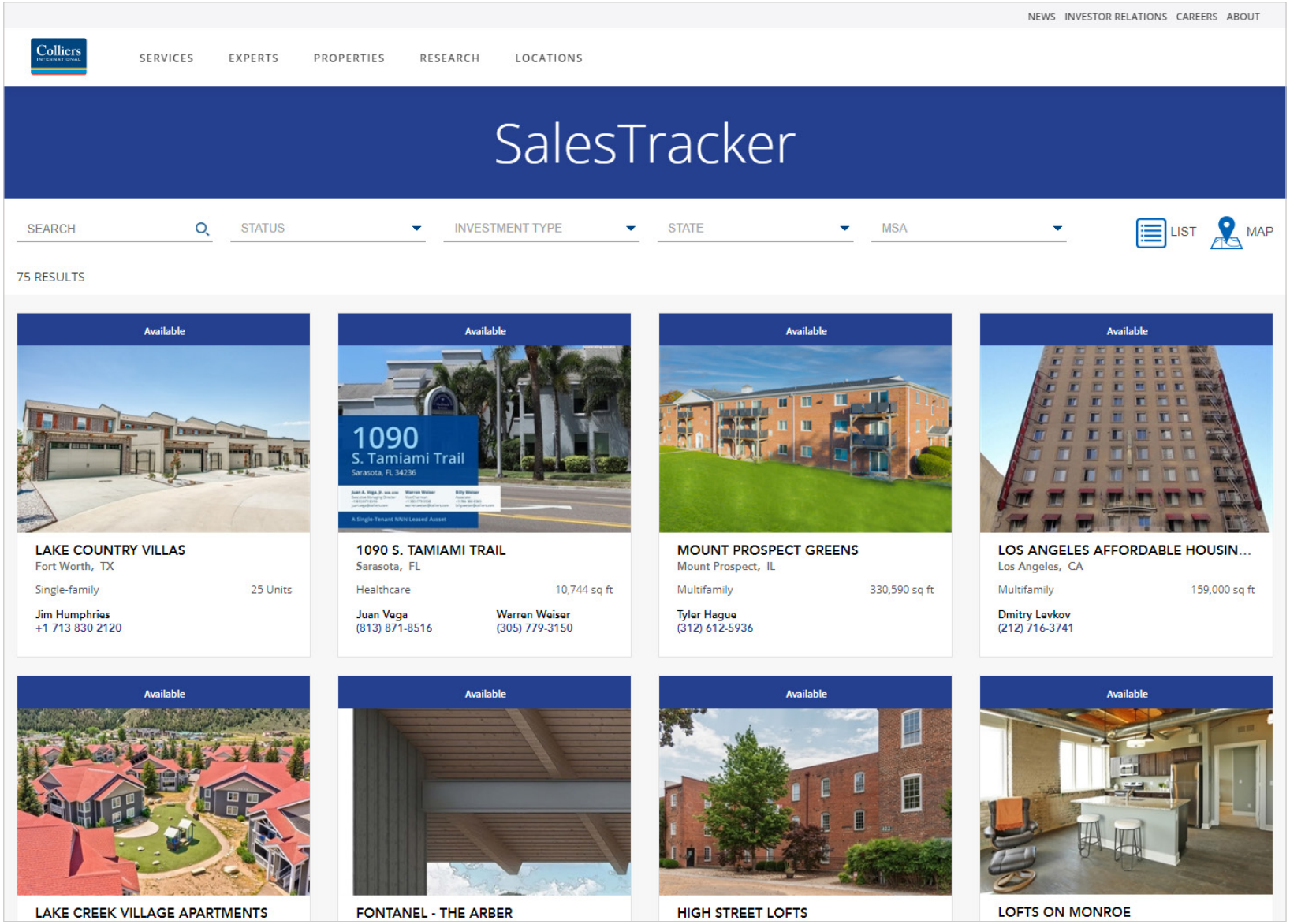


Key

1. Navigate to the Overview/Listing tab
2. Add a property summary
3. Select the number of contacts you'd like to display (engine will support up to 2)
   > To change the display order, go to the Overview/Contacts tab
4. Select the desired engine(s) for property to display
   > Click Preview prior to saving to view

   Note: Only projects with an Available status will display on the JLL engine
5. Save

Colliers Listing Engine



FAQ's

FAQ's

Q: **Do others see my deal before it's launched?**
A: No, as long as the status of your deal (on the overview/details page) is set to Pre-Marketing, your deal will not be seen by others. Once your deal is launched, the system will automatically update the status to Available and then others can see it via inSIGHT.

Q: **How do I keep my financial information private?**
A: You can choose to hide the financial information of your project by unchecking the display box to the right of the information on the Overview/Details page.

Q: **Is there a way to see everything that has sold?**
A: Yes, on the inSIGHT drop down you can select to view all assets marked as sold. You can click on the More Filters option to set a specific date range.

Q: **Can I search for specific projects?**
A: Yes, on inSIGHT you can use the search field to search for a specific listing by the typing in the project ID, Name, Team, City or Zip. Or you can use the filters to narrow the list down by asset type, location, etc.

Q: **Can I drill down to see a specific asset type and/or location?**
A: Yes, you can use the inSIGHT filters to select a specific asset type and/or sub-type as well as select a specific location, state or MSA.

Q: **Can I access projects that I am not a contact on?**
A: You can see all available assets in the list or map view with limited information and if the deal is on the market, you will be able to see the Executive Summary website. For additional information, you will need to request more information from the listing broker.

FAQ's

Q: How do I access projects I manage?

A: You can click on the Projects drop down at the top of the page and select My Projects. Or, from the inSIGHT list or map view the project name will be hyperlinked for those projects that you are an administrative contact on.

Q: How can I see everything Colliers has listed for a specific seller (i.e., Hines) this year?

A: The Company Scorecard (AKA Balance of Trade) is where you can locate specific information on a buyer/sellers company activity.

To access:

a. Click on the inSIGHT drop down at the top of the page
b. Select Company Scorecard
c. Type in the specific company name you want lookup
d. From the list of result(s), click on the company name you want to view
e. Click on the listed option at the top of the page to view all the assets that this company has been marked as the seller

Q: Why do some listings say View Executive Summary and others say Snapshot?

A: You will see the option to view the Executive Summary for all available/on-market Colliers listings. If you manage the listing, you will have see the option to view the Snapshot, which is a quick overview of that listing that includes financial information and reporting.

Q: How can I see everything that Colliers has listed/available in my market?

A: You can use the search bar across the top to set your filters, or click on more filters and select your search options. For example to see all multifamily listings in California that are on the market your search criteria would be:

a. Status – Available
b. Asset Type –Multifamily
    a. You can also drill down into a specific asset type, Garden Apartments
c. Location – Expand the regions and select California
    a. You can also drill down into specific MSA(s)

FAQ's

Q: Can I view deals listed by other brokers that have been taken off the market?

A: You will be able to see and access your listings that have been set to Taken off Market but not listings managed by other brokers.

Q: Why do I sometimes see "- -", "N/A" or "Hidden" in the financial column on the list view?

A: Under the financial information:

a. "- -" for the sale price or NOI means that this information has not been entered into the platform by the listing team
b. "N/A" for the Cap Rate, this is because this information is also set to display but the required fields to calculate the Cap Rate have not been entered in by the listing team.
c. "Hidden" for any values means that this information is not set to display by the listing team

Q: Is there a way to export a list of my search results?

A: Yes, from the list view if you want to export an excel file of your search results you can click on the export icon on the inSIGHT toolbar.

Q: How can I view how many multifamily deals a specific company (i.e., Camden Property Trust) has bought from Colliers?

A: The Company Scorecard (AKA Balance of Trade) is where you can locate specific information on a buyer/sellers company activity.

To access:

a. Click on the inSIGHT drop down at the top of the page
b. Select Company Scorecard
c. Type in the specific company name you want lookup
d. From the list of result(s), click on the company name you want to view
e. Click on the Acquired option at the top of the page to view all of the assets that this company has been marked as the buyer

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Questions?

Contact:

Tanya Ball
Director of Client Services
clientservices@lightboxre.com

Eric Bromley
SVP | New York Capital Markets
eric.bromley@colliers.com