



SalesTracker
Powered by RCM LightBox



inSIGHT Manual

A Guideline for Navigating the inSIGHT platform

2021 Edition



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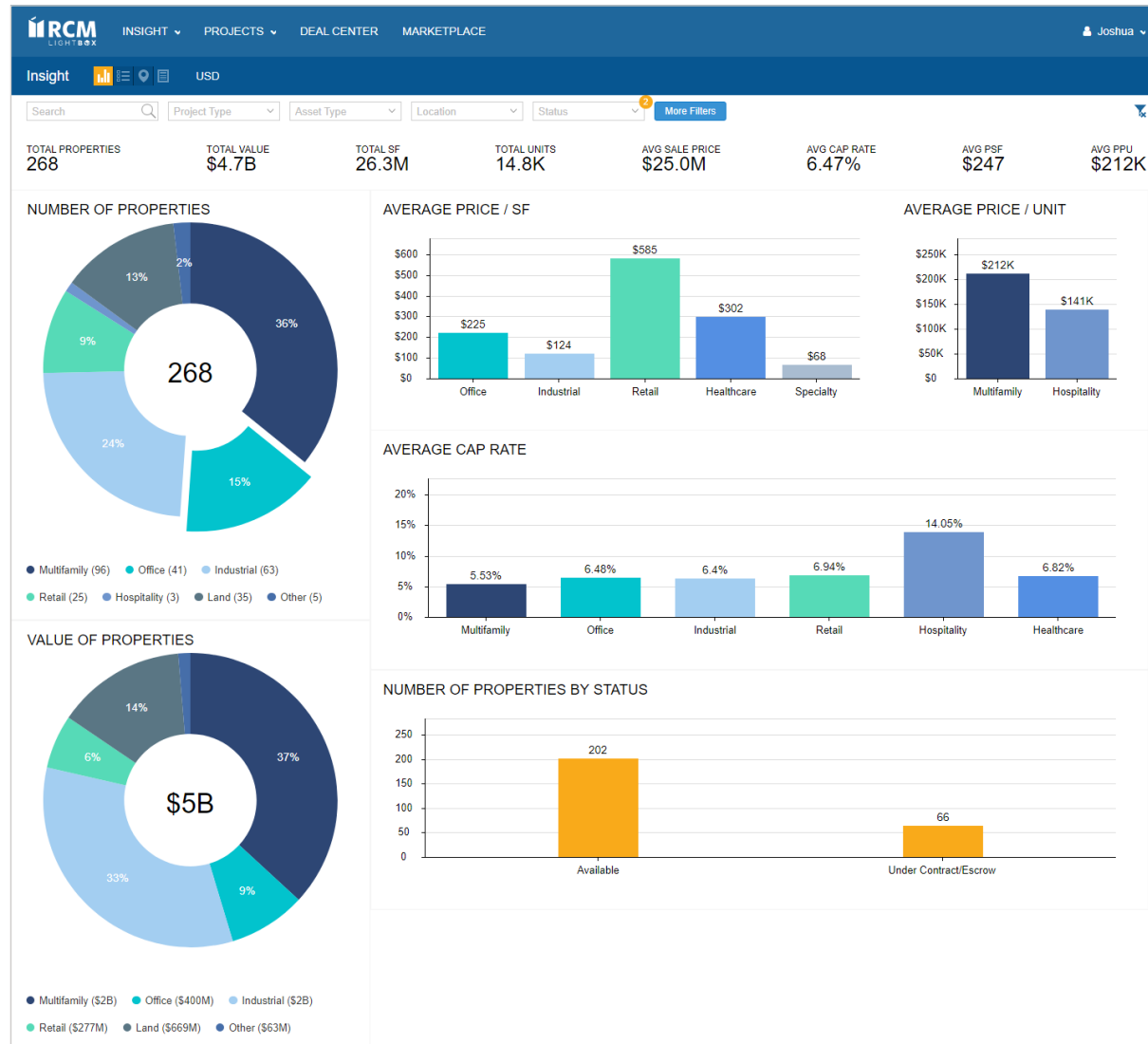
SalesTracker
Powered by RCM LightBox



inSIGHT Dashboard

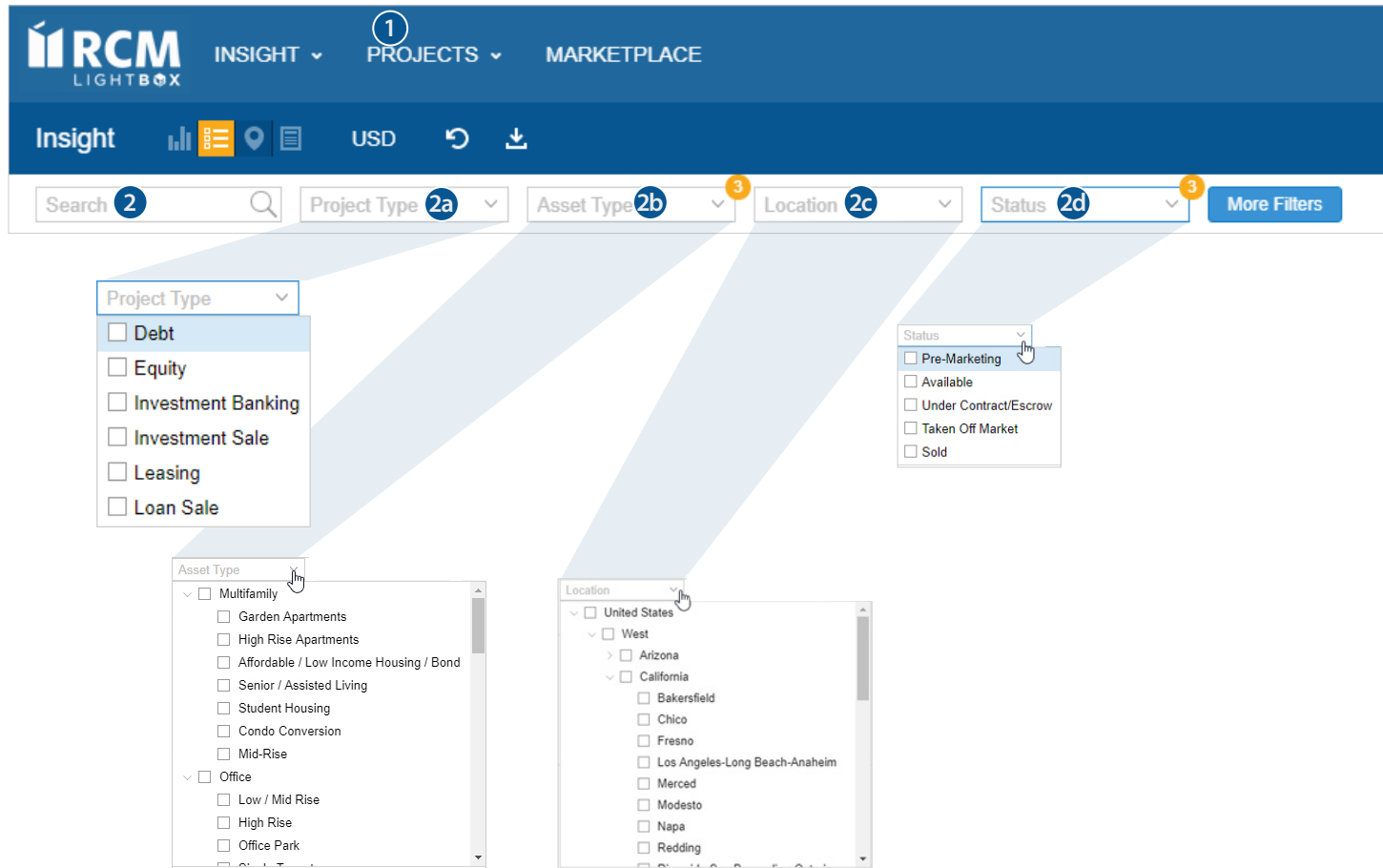
inSIGHT Dashboard

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



Filters

Filters




The screenshot shows the RCM LightBox SalesTracker interface. The top navigation bar includes 'INSIGHT', 'PROJECTS', and 'MARKETPLACE' tabs. Below the navigation bar is a search bar and several filter dropdowns: 'Project Type', 'Asset Type', 'Location', and 'Status'. Each dropdown is expanded to show its options. 'Project Type' includes Debt, Equity, Investment Banking, Investment Sale, Leasing, and Loan Sale. 'Asset Type' includes Multifamily (with sub-options like Garden Apartments, High Rise Apartments, Affordable / Low Income Housing / Bond, Senior / Assisted Living, Student Housing, Condo Conversion, Mid-Rise) and Office (with sub-options like Low / Mid Rise, High Rise, Office Park, etc.). 'Location' includes United States (with sub-options like West, Arizona, California, Bakersfield, Chico, Fresno, Los Angeles-Long Beach-Anaheim, Merced, Modesto, Napa, Redding, etc.). 'Status' includes Pre-Marketing, Available, Under Contract/Escrow, Taken Off Market, and Sold. A 'More Filters' button is also present.

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


INSIGHT ▾ PROJECTS ▾ MARKETPLACE

Insight
USD

Search
Project Type ▾ Asset Type ▾ Location ▾ Status ▾ More Filters

Key

- 3 More filters - drill down to view specific information
 - a. Filter by date
 - b. Filter by buyer
 - c. Filter by Tenancy Type

3 Filter

ID / Name / Team / City / Zip

STATUS
All Statuses

PROJECT TYPE
All Types

PRICE
Minimum to Maximum

SIZE
Minimum to Maximum

UNITS
Minimum to Maximum

CREATE DATE
Start Date to End Date

CALL FOR OFFERS
Start Date to End Date

SALE DATE
Start Date to End Date

PROPERTY CLASS
Select

INVESTMENT TYPE
Select

TENANCY TYPE
Select

BUYER
Select

SELLER
Select

BROKER
Select

ASSET TYPE

☐ Multifamily

☐ Garden Apartments
☐ High Rise Apartments
☐ Affordable / Low Income Housing
☐ Senior / Assisted Living
☐ Student Housing
☐ Condo Conversion

☐ Office

☐ Low / Mid Rise
☐ High Rise
☐ Office Park
☐ Data Center
☐ Government Leased

☐ Industrial

☐ Industrial Single Tenant
☐ Warehouse / Distribution

LOCATION

☐ United States

☐ West
☐ Southwest
☐ Southeast
☐ Northeast
☐ Midwest
☐ Mid-Atlantic

☐ Canada

☐ Ontario

☐ Europe

☐ Germany

Clear All Filters Filter

inSIGHT List View

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.

RCMLIGHTBOX

INSIGHT

PROJECTS

MARKETPLACE

Caly

Insight

USD

54 projects

Search






Project Type

Asset Type

Location

Status

More Filters

Name	Project Information	Seller / Buyer	Financials	Marketing Summary
Silk Factory Lofts				
<div>Available</div> <div></div>	<div>United States</div> <div>ID:49712</div> <div>View Snapshot</div>	<div>Investment Sale</div> <div>Multifamily - Garden Apartments</div> <div>116 units</div>	<div>Asking Price: \$21,000,000</div> <div>NOI: \$1,027,433</div> <div>Cap Rate: 4.89%</div> <div>PPU: \$181,034</div>	<div>Prospects: 0</div> <div>Agreements: 0</div> <div>Offers: 0</div> <div>Days On Market: 106</div>
Summerchase at Riverchase				
<div>Available</div> <div></div>	<div>United States</div> <div>ID:49686</div> <div>View Executive Summary</div>	<div>Financing / Equity / Debt</div> <div>Multifamily - Mid-Rise</div> <div>240 units</div>	<div>Asking Price: Hidden</div> <div>NOI: Hidden</div> <div>Cap Rate: Hidden</div>	<div>Prospects: 11</div> <div>Agreements: 72</div> <div>Offers: 0</div> <div>Days On Market: 106</div>
Foster Square				
<div>Available</div> <div></div>	<div>Voorhees, NJ 08043</div> <div>United States</div> <div>ID:49458</div> <div>View Snapshot</div>	<div>Investment Sale</div> <div>Multifamily - Garden Apartments</div> <div>353 units</div>	<div>Asking Price: Hidden</div> <div>NOI: Hidden</div> <div>Cap Rate: Hidden</div> <div>PPU: Hidden</div>	<div>Prospects: 8,586</div> <div>Agreements: 106</div> <div>Offers: 0</div> <div>Days On Market: 113</div>
Chimneys of Cradlerock				
<div>Available</div> <div></div>	<div>Columbia, MD 21045</div> <div>United States</div> <div>ID:49437</div> <div>View Snapshot</div>	<div>Investment Sale</div> <div>Multifamily - Garden Apartments</div> <div>198 units</div>	<div>Asking Price: Hidden</div> <div>NOI: Hidden</div> <div>Cap Rate: Hidden</div> <div>PPU: Hidden</div>	<div>Prospects: 8,707</div> <div>Agreements: 151</div> <div>Offers: 0</div> <div>Days On Market: 113</div>
Villa de Oro				
<div>Available</div> <div></div>	<div>San Antonio, TX 78224</div> <div>United States</div>	<div>Investment Sale</div> <div>Multifamily - Garden Apartments</div>	<div>Asking Price: Hidden</div> <div>NOI: Hidden</div>	<div>Prospects: 4,250</div> <div>Agreements: 126</div>

Key

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

inSIGHT List View

(continued)

<div> INSIGHT ▾ PROJECTS ▾ MARKETPLACE </div> <div> Insight <div> <div>USD</div> <div>↺</div> <div>↻</div> </div> <div>4 54 projects</div> </div>									
<div> <div>5 Search</div> <div>Project Type ▾</div> <div>Asset Type ▾</div> <div>Location ▾</div> <div>Status ▾</div> <div>More Filters 6</div> <div>7</div> </div>									
Name		Project Information		Seller / Buyer		Financials		Marketing Summary	
Silk Factory Lofts									
<div>8 Available</div>	United States	Investment Sale				Asking Price:	\$21,000,000	Prospects:	0
	ID:49712	Multifamily - Garden Apartments				NOI:	\$1,027,433	Agreements:	0
	View Snapshot	116 units				Cap Rate:	4.89%	Offers:	0
						PPU:	\$181,034	Days On Market:	106
Summerchase at Riverchase									
<div>Available</div>	United States	Financing / Equity / Debt		S TriBridge Residential		Asking Price:	Hidden	Prospects:	11
	ID:49686	Multifamily - Mid-Rise				NOI:	Hidden	Agreements:	72
	View Executive Summary 8a	240 units				Cap Rate:	Hidden	Offers:	0
								Days On Market:	106
Foster Square									
<div>Available</div>	Voorhees, NJ 08043	Investment Sale		S Cabot Properties, Inc.		Asking Price:	Hidden	Prospects:	8,586
	United States	Multifamily - Garden Apartments				NOI:	Hidden	Agreements:	106
	ID:49458	353 units				Cap Rate:	Hidden	Offers:	0
	View Snapshot					PPU:	Hidden	Days On Market:	113
Chimneys of Cradlerock									
<div>Available</div>	Columbia, MD 21045	Investment Sale				Asking Price:	Hidden	Prospects:	8,707
	United States	Multifamily - Garden Apartments				NOI:	Hidden	Agreements:	151
	ID:49437	198 units				Cap Rate:	Hidden	Offers:	0
	View Snapshot 8a					PPU:	Hidden	Days On Market:	113
Villa de Oro									
<div>Available</div>	San Antonio, TX 78224	Investment Sale				Asking Price:	Hidden	Prospects:	4,250
	United States	Multifamily - Garden Apartments				NOI:	Hidden	Agreements:	126

Key

- The number of projects displayed will be based on your filter selections
- 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
- More Filters allows you to expand your search criteria (see page 7 for more information)
- Clear all filters option allows you go back and display all properties
- Users are able to see the projects that have the status of:
 - Available – access to the executive summary for all projects; Snapshot for projects you manage
 - Under Contract - access to the executive summary for all projects
 - Sold - access to the executive summary for all projects
 - Pre-Marketing – only accessible if you manage the property
 - Access to property Snapshot
 - Taken off Market – only accessible if you manage the property

inSIGHT List View

(continued)

RCM LIGHTBOX INSIGHT PROJECTS MARKETPLACE Caly					
Insight USD 54 projects					
Search Project Type Asset Type Location Status More Filters					
Name	Project Information 9	Seller / Buyer 10	Financials 11	Marketing Summary 12	
Silk Factory Lofts	Available United States ID:49712 View Snapshot	Investment Sale Multifamily - Garden Apartments 116 units	Asking Price: \$21,000,000 NOI: -- 11a Cap Rate: N/A PPU: \$181,034	Prospects: 0 Agreements: 0 Offers: 0 Days On Market: 106	
Summerchase at Riverchase	Available United States ID:49686 View Executive Summary	Financing / Equity / Debt Multifamily - Mid-Rise 240 units (S) TriBridge Residential	Asking Price: Hidden 11b NOI: Hidden Cap Rate: Hidden	Prospects: 11 Agreements: 72 Offers: 0 Days On Market: 106	
Foster Square	Available Voorhees, NJ 08043 United States ID:49458 View Snapshot	Investment Sale Multifamily - Garden Apartments 353 units (S) Cabot Properties, Inc.	Asking Price: Hidden NOI: Hidden Cap Rate: Hidden PPU: Hidden	Prospects: 8,586 Agreements: 106 Offers: 0 Days On Market: 113	
Chimneys of Cradlerock	Available Columbia, MD 21045 United States ID:49437 View Snapshot	Investment Sale Multifamily - Garden Apartments 198 units	Asking Price: Hidden NOI: Hidden Cap Rate: Hidden PPU: Hidden	Prospects: 8,707 Agreements: 151 Offers: 0 Days On Market: 113	
Villa de Oro	Available San Antonio, TX 78224 United States	Investment Sale Multifamily - Garden Apartments	Asking Price: Hidden NOI: Hidden	Prospects: 4,250 Agreements: 126	

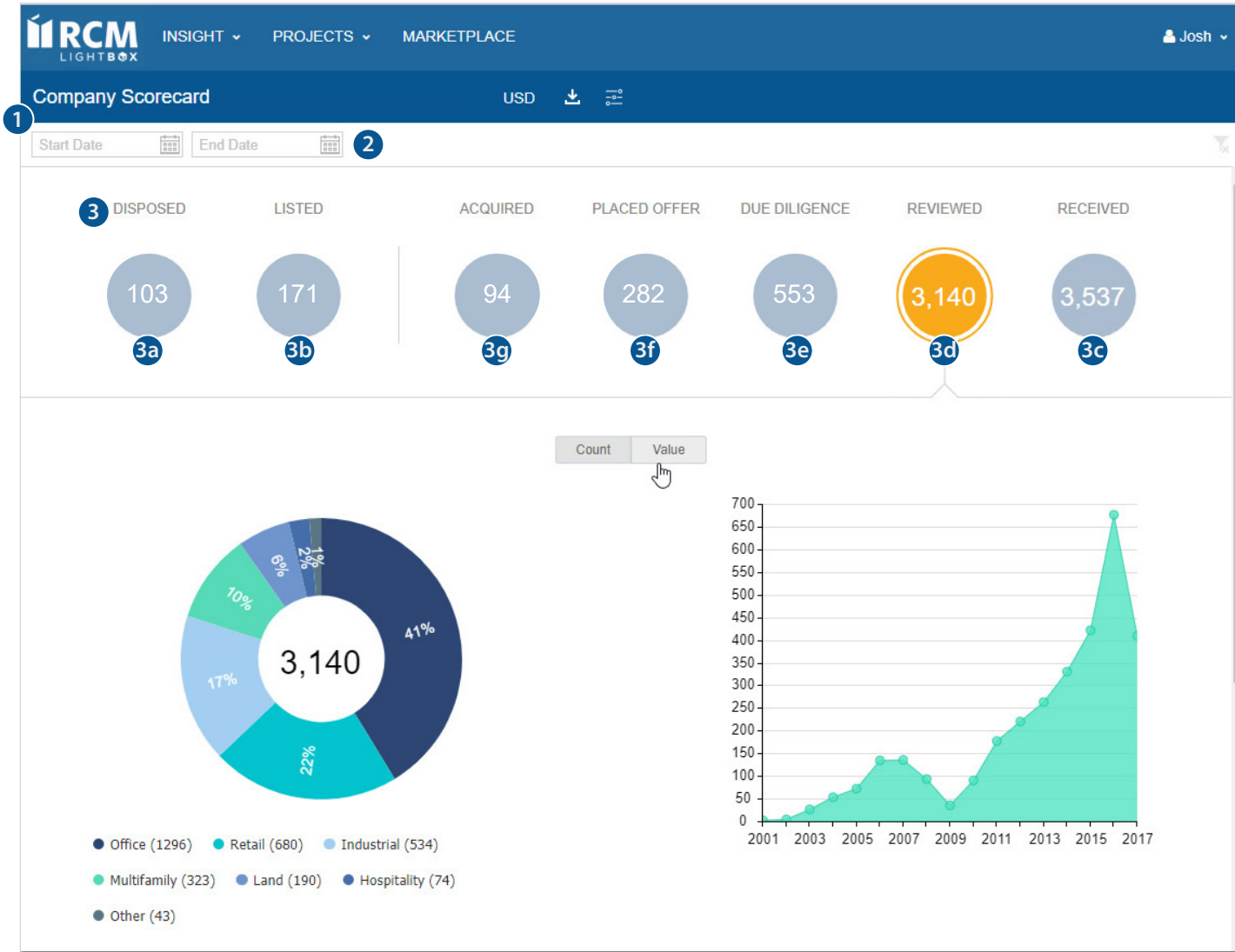
Key

- 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)

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.

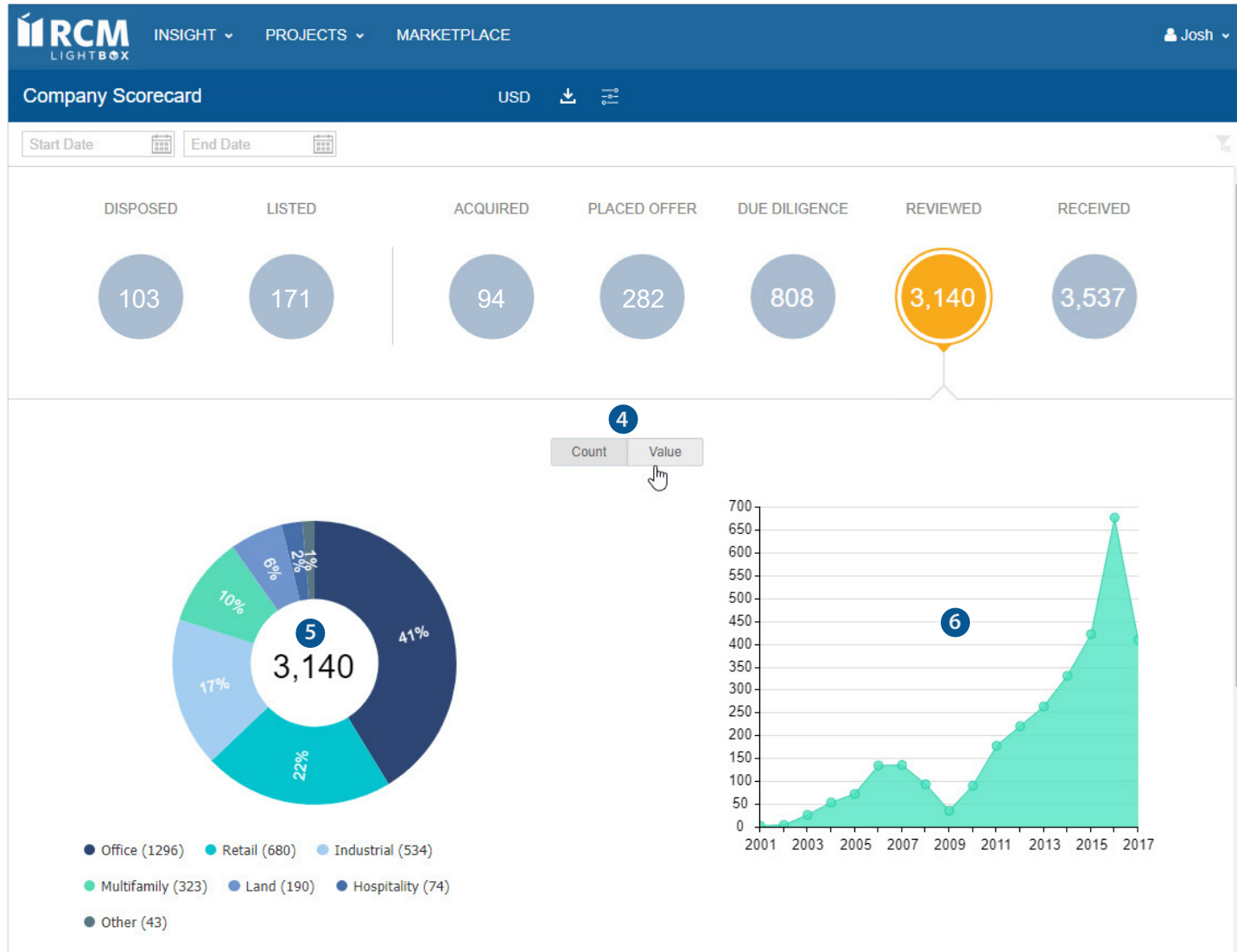


Key

- 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

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)

RCM
LIGHTBOX

INSIGHT ▾ PROJECTS ▾ MARKETPLACE

2

Josh ▾

Company ScorecardUSD

Start DateEnd Date

Reviewed 110 Results

Name	Date	Location	Asset Type	Additional Info
Shawmut Plaza - Avon	02/08/2018	Avon, Connecticut	Retail - Grocery Anchored	Executive Summary
Shawmut Plaza - Flowery Branch	02/06/2018	Flowery Branch, Georgia	Retail - Grocery Anchored	Executive Summary
Shawmut Plaza - Torrance	02/02/2018	Torrance, California	Office - Low / Mid Rise	Executive Summary
Shawmut Plaza - Mid-Rise	02/01/2018		Multifamily - Mid-Rise	Executive Summary
Shawmut Plaza - Fort Belvoir	01/31/2018	Fort Belvoir, Virginia	Multifamily - Mid-Rise	Executive Summary
Shawmut Plaza - Carmel	01/25/2018	Carmel, Indiana	Office - Low / Mid Rise	Executive Summary
Shawmut Plaza - Garland	01/23/2018	Garland, Texas	Retail - Shopping Center	Executive Summary
Shawmut Plaza - Newington	01/23/2018	Newington, Connecticut	Retail - Grocery Anchored	Executive Summary
Shawmut Plaza - San Diego	01/18/2018	San Diego, California	Land - Multifamily	Executive Summary
Shawmut Plaza - Palo Alto	01/17/2018	Palo Alto, California	Retail - NNN / Free Standing Retail	Executive Summary

Key

1

View the assets matching the selected action and date range

2

Download data into a spreadsheet

Report Ready

i

[Click here to download the report](#)

2

Close



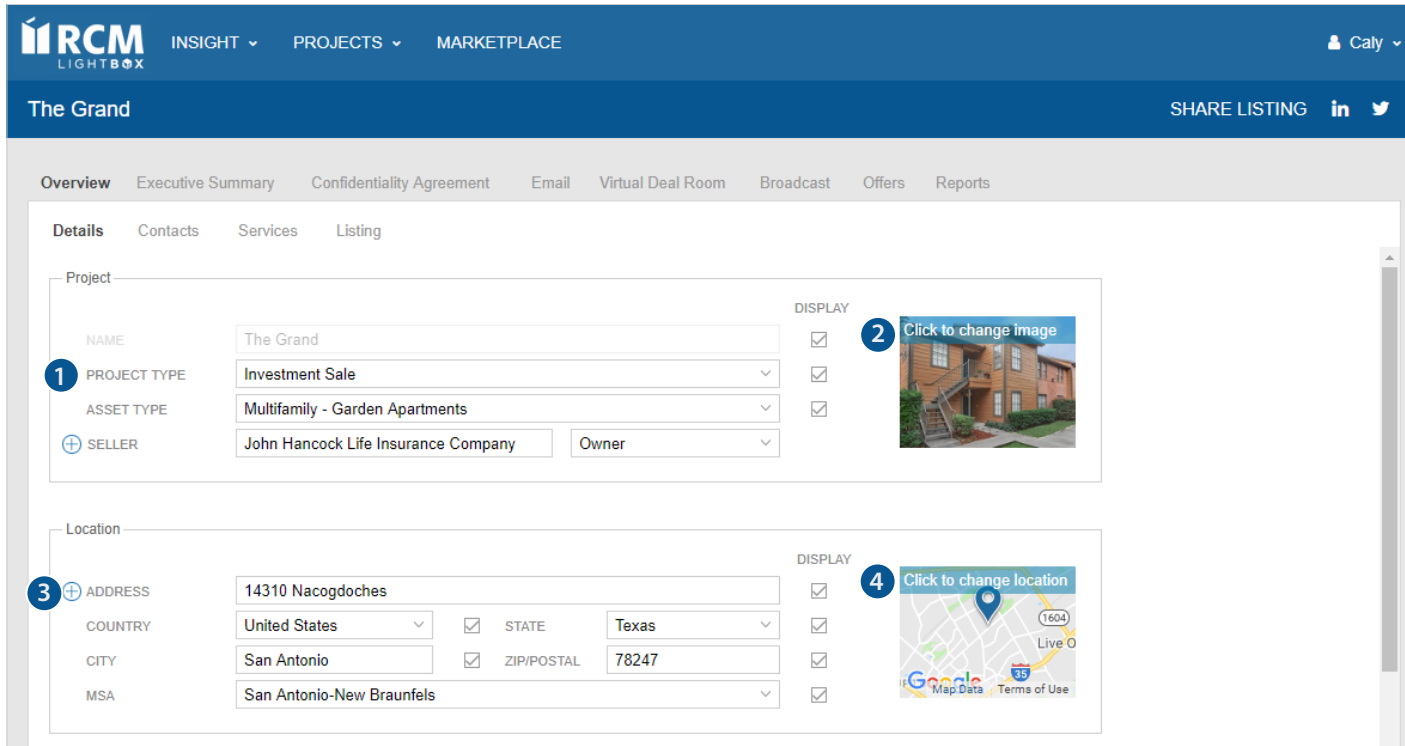
SalesTracker
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Listing Engine Requirements

Listing Engine Requirements

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



The screenshot shows the 'The Grand' listing page in the RCM LightBox interface. The page has a top navigation bar with 'INSIGHT', 'PROJECTS', and 'MARKETPLACE' tabs. Below this is a sub-navigation bar with 'Overview', 'Executive Summary', 'Confidentiality Agreement', 'Email', 'Virtual Deal Room', 'Broadcast', 'Offers', and 'Reports'. The 'Details' tab is selected, showing fields for 'Project' and 'Location'. The 'Project' section includes fields for NAME, PROJECT TYPE, ASSET TYPE, and SELLER. The 'Location' section includes fields for ADDRESS, COUNTRY, STATE, CITY, ZIP/POSTAL, and MSA. A 'DISPLAY' column with checkboxes is on the right of each section. Callout 1 points to the PROJECT TYPE field. Callout 2 points to the image thumbnail. Callout 3 points to the ADDRESS field. Callout 4 points to the map thumbnail.

Project		DISPLAY
NAME	The Grand	<input checked="" type="checkbox"/>
PROJECT TYPE	Investment Sale	<input checked="" type="checkbox"/>
ASSET TYPE	Multifamily - Garden Apartments	<input checked="" type="checkbox"/>
SELLER	John Hancock Life Insurance Company	<input checked="" type="checkbox"/>


Location		DISPLAY
ADDRESS	14310 Nacogdoches	<input checked="" type="checkbox"/>
COUNTRY	United States	<input checked="" type="checkbox"/>
STATE	Texas	<input checked="" type="checkbox"/>
CITY	San Antonio	<input checked="" type="checkbox"/>
ZIP/POSTAL	78247	<input checked="" type="checkbox"/>
MSA	San Antonio-New Braunfels	<input checked="" type="checkbox"/>

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)


INSIGHT ▾
PROJECTS ▾
MARKETPLACE

Joshly ▾

The Grand

SHARE LISTING in

Overview
Executive Summary
Confidentiality Agreement
Email
Virtual Deal Room
Broadcast
Offers
Reports

Details
Contacts
Services
Listing

Location

+

ADDRESS

14310 Nacogdoches

DISPLAY

☒

COUNTRY

United States ▾

☒

STATE

Texas ▾

☒

CITY

San Antonio

☒

ZIP/POSTAL

78247

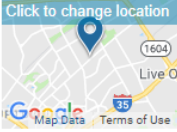
☒

MSA

San Antonio-New Braunfels ▾

☒

Click to change location



1 Property Details

UNITS

136

Units ▾

☒

SIZE

174,384

sq ft ▾

☒

PARCEL

acres ▾

☐

APN

☐

CLASS

B ▾

☒

OCCUPANCY (%)

☐

2

YEAR BUILT

1984

☒

YEAR RENOVATED

2016

☒

INVESTMENT TYPE

▾

☐

ID

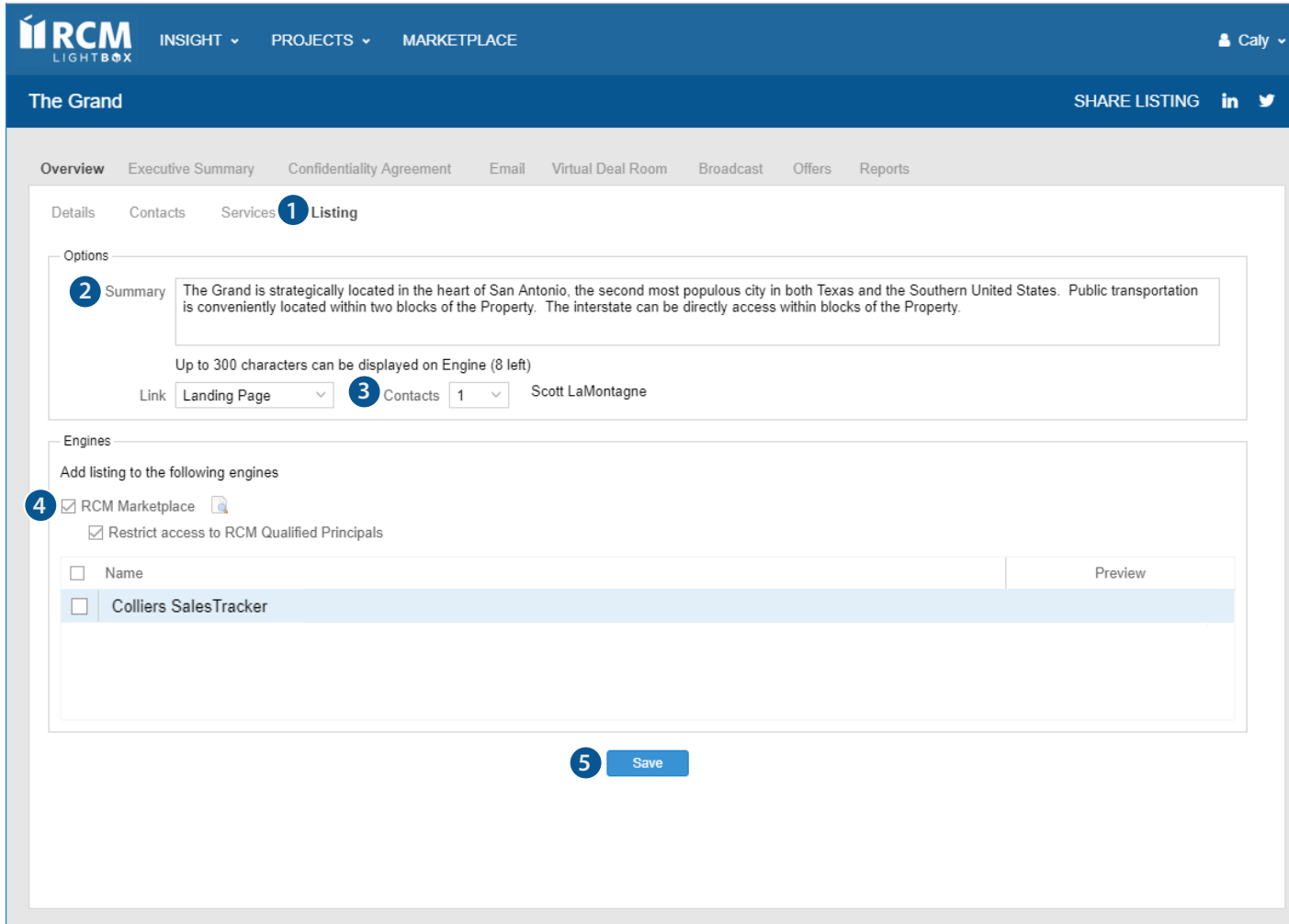
☐

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.



The screenshot shows the RCM LightBox interface for adding a property listing. The top navigation bar includes 'INSIGHT', 'PROJECTS', and 'MARKETPLACE'. The main header shows 'The Grand' and 'SHARE LISTING' with social media icons. The 'Overview' tab is selected, and the 'Listing' sub-tab is active. The interface is divided into sections: 'Options' and 'Engines'. In the 'Options' section, there is a 'Summary' field (Step 2) containing text about the property's location in San Antonio. Below the summary is a character count and a 'Link' dropdown set to 'Landing Page'. The 'Contacts' section (Step 3) shows '1' contact, 'Scott LaMontagne'. In the 'Engines' section (Step 4), there are checkboxes for 'RCM Marketplace' and 'Restrict access to RCM Qualified Principals'. Below this is a table with columns 'Name' and 'Preview', containing one entry 'Colliers SalesTracker'. At the bottom, there is a 'Save' button (Step 5).

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

NEWS INVESTOR RELATIONS CAREERS ABOUT

Colliers INTERNATIONAL

SERVICES EXPERTS PROPERTIES RESEARCH LOCATIONS

SalesTracker

SEARCH

STATUS

INVESTMENT TYPE

STATE


MSA

LIST

MAP


75 RESULTS

Available




LAKE COUNTRY VILLAS
Fort Worth, TX
Single-family 25 Units
Jim Humphries
+1 713 830 2120

Available




1090 S. TAMIAMI TRAIL
Sarasota, FL 34236
A Single-Tenant 100% Leased Asset
Healthcare 10,744 sq ft
Juan Vega (813) 871-8516 Warren Weiser (305) 779-3150

Available




MOUNT PROSPECT GREENS
Mount Prospect, IL
Multifamily 330,590 sq ft
Tyler Hague (312) 612-5936

Available



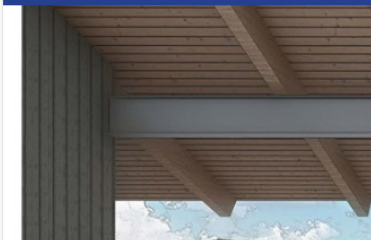
LOS ANGELES AFFORDABLE HOUSIN...
Los Angeles, CA
Multifamily 159,000 sq ft
Dmitry Levkov (212) 716-3741

Available




LAKE CREEK VILLAGE APARTMENTS

Available




FONTANEL - THE ARBER

Available



HIGH STREET LOFTS

Available



LOFTS ON MONROE

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



Questions?

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