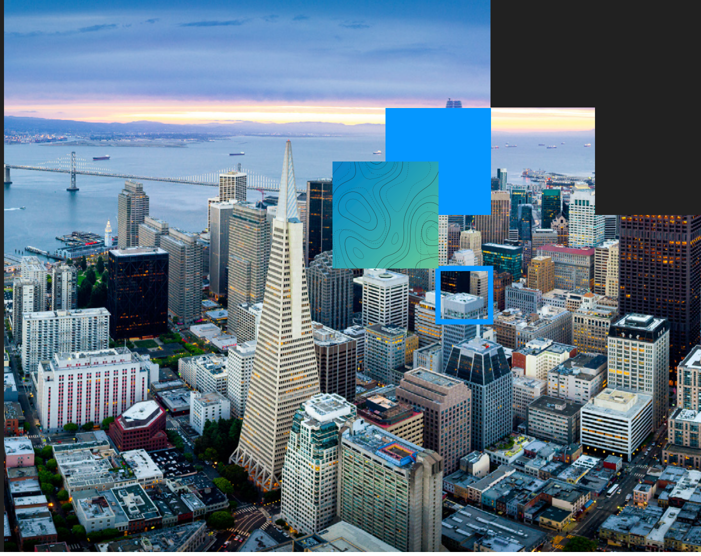
RCM

RCM Deal Setup Guide

This guide is a step-by-step reference for setting up a deal in LightBox RCM, covering everything from entering property details to broadcasting marketing emails to your buyer list.



1. Enter Property and Deal Info on the ***Overview > Details*** tab

- Upload your **Primary Image** for Marketplace display.
- Click the **Map** to verify the pin location, adjust zoom, and choose Bing or Google Maps. Incomplete addresses won't map—double-check all fields.
- Under **Property Details**, enter key statistics and check the **Display** box to highlight them.

Tip: Projects move from *Pre-Marketing* to *Available* automatically after the initial broadcast.

2. Add Your Deal Team in the ***Overview > Contacts*** tab

- Drag and drop to reorder team members.
- Click on **+ Add** to input additional team members.
- Use **Edit Notifications** to manage who gets alerts or appears publicly.
- Contact your Account Manager to update contact info like job title, license number, or phone format.

3. Build Your Marketing Landing Page on the ***Executive Summary*** tab

- Select the **Landing Page** option and click Save to gain access to the templates
- Click **Options** (top right) to customize colors, upload a brochure, or link to social media.
- Add/reorder sections by clicking and dragging.
- Always **Save** and use **Preview** to review changes.

Tip: Easily switch layouts using the **Template** dropdown.

4. Set Up Email Campaigns in the ***Email*** tab

- Click **New Campaign** and create:
  - An **Initial Broadcast**
  - A **VDR Invite**
- Craft a short, compelling subject line.
- Set a **From Alias** and use "; " to separate multiple **Reply-To** emails.
- Copy content from past projects using **Copy Previous**.

Tip: Always preview your email. Check spelling, links, and formatting.

Questions? Contact Us at clientservices@lightboxre.com

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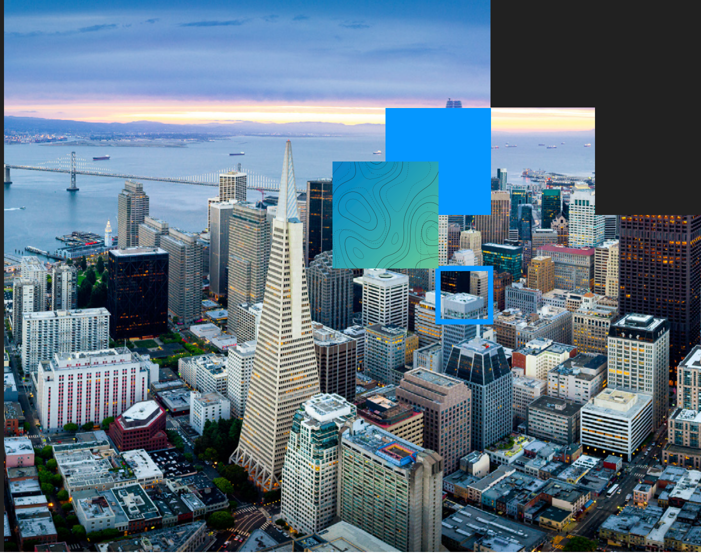

5. Upload CA/NDA's to the Confidentiality Agreement tab (Principal / Broker menus)

- Upload CA(s) for Principals and/or Brokers. The system shows the correct one based on user role.
  - **Online Execution** is default—no printing required.
- Choose an approval workflow:
  - **Auto-Approve**: Mark as "Approved" and link to your VDR invite email.
  - **Manual**: Mark as "Pending Approval".

6. Add Documents to the Virtual Deal Room tab

- Drag and drop files or folders.
- Right-click to rename documents.
- Use the **I want to...** menu to:
  - Search, send alerts, edit VDR page display, adjust storage, or create traceable links.

Tip: Click on the Preview button to view as the potential investor

- Set access level to:
  - **Low** = all approved users
  - **Medium/High** = restricted access (2 or 3 tiers)

7. Enable and Configure the Offers Page

- **Location:** *Offers tab*
- Check **Allow user to access the Offers** page to activate.
- Paste in your Call For Offers instructions.
- Add/edit fields or required offer documents.

Tip: Always **Preview** before granting access to buyers.

8. Build and Send Your Buyer List in the Broadcast tab

- Go to **Users > Import**, include each user's role, and set progress to **None**. Choosing a progress level other than None (ex: VDR Docs - Medium) will import Users with that progress.
- If the RCM Principal list is part of your package, click on **Admin > Add RCM Principals** (make sure Asset Type, MSA, & Asking Price are correct on the Overview-Details tab)
- Send a **Test Broadcast** to review for errors and broken links.

Tip: Double-check everything before clicking **Broadcast > Schedule Broadcast**.

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