

Checklist to Schedule an Email Broadcast

This checklist is a comprehensive guide for preparing an email broadcast via the RCM platform. It outlines the necessary steps and quality checks across various tabs.



Overview Tab:

Complete property/financial sections and ensure a property photo has been uploaded in the top right of the Details sub tab, as this will appear when added to the RCM Marketplace.

Under the Contacts sub tab, make sure that correct users are set to display and receive CA Notifications (found in “Edit Notifications”).

RCM Marketplace changes can be made on the Listings sub tab.

Executive Summary Tab (Optional):

Setup Landing Page (preferred) and/or upload a brochure.

Confidentiality Agreement Tab:

Upload your Confidentiality Agreement/NDA.

If online execution settings are set to “Mark them as Approved,” ensure there is a Virtual Deal Room (VDR) Invite email set to be sent in the “Send them the ____ email” window. *Optional: place signers in a pending status.*

Email Tab (Create marketing email and VDR invite email):

Open the email template you will be sending (click on New Campaign at the top right and select template). Ensure the left side bar fields and subject line are filled out before you can save your work:

- “From Alias” is who recipients see as the sender of the email.
- “Reply To” email is your email address(es).
- Subject line is clear, concise, and spelled correctly.

Send yourself a test email. In the email editor, click on Preview at the top right and select View in Email to be sent a test email.

- Ensure all fonts are consistent.
- Click through all links to ensure they go to the correct destination (for example, the Landing Page, Brochure, Confidentiality Agreement or Virtual Deal Room).
 - Please note – For email broadcasts that include Approved Users, use the VDR Link Type. It’s a “smart link” which will guide unapproved users to the agreement and approved users to the Virtual Deal Room.
- Click on contact email addresses at the bottom to ensure they are going to the correct individual.

Questions? Contact Us at clientservices@lightboxre.com



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Virtual Deal Room Tab:

Make sure to upload due diligence documents for investors to access.

Broadcast Tab:

Have you imported your list of contacts?

Have the RCM Principals been uploaded? (If purchased.)

Who are we sending to? Broadcast Progress definitions:

Not Broadcasted: Anyone who has not been sent an email yet.

Non-Responder: Anyone who has not opened an email or clicked any link in an email.

Viewed Email: Anyone who has opened an email.

Viewed Executive Summary: Anyone who has viewed the Landing Page or Brochure.

Viewed Agreement: Anyone who has looked at the confidentiality agreement online, but they have not yet executed it.

Pending Approval to VDR: Anyone who has signed the online confidentiality agreement, and is in the "Pending Approval" status due to the online CA being set up to the Pending Approval setting.

Approved: Anyone who has been approved, whether automatically by the system, or by a contact manually.

Submitted Offer: Anyone who has completed the online offer requirements and has clicked the button on that page to submit an offer.

Email Link Types definitions (when editing links):

Landing Page Link: Link to the Modern Landing Page created under the Executive Summary tab (property website).

Brochure Link: Link to a teaser brochure that has been uploaded under the Executive Summary tab (i.e. PDF).

Agreement Link: Meant for all unapproved users and will prompt the Confidentiality Agreement.

Virtual Deal Room Link (Smart Link): Link type utilized in the Virtual Deal Room invite email as well as the link type that should be used when sending marketing email to Approved users and/or a combination of Approved and all other users in the deal.

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