

Reporting Best Practices & Quick Tips

RCM provides a comprehensive suite of reports designed to support every stage of the marketing, due diligence, and sales process, offering valuable insights and data to drive informed decision-making.



Activity Report

All-inclusive report showing each time a user takes action such as Viewed Executive Summary, Viewed Agreement, Executed Agreement, Entered Virtual Deal Room, etc. Also indicates how a user accessed each page (ex: entered the VDR from an email link, viewed your Executive Summary from the project or RCM Marketplace)

- 1 Summary of all activity is displayed at the top of the report. This will adjust as the date range and/or email campaign is updated.
- 2 Search by company or user's first/last name.
- 3 Search by a specific email campaign.
- 4 To see users that have only viewed the email check the "Viewed Email" checkbox
- 5 Set date range to see activity in a specific period.
- 6 Export the report into a PDF or Excel file.

Overview										
Dashboard										
Activity										
Agreements										
Offers										
User Broadcast										
Bounces										
Marketing Report										
Source										
03/26/2025	10,677	4,158	126	159	90	93	65	64	0	
First Broadcast Date	Sent Email	Viewed Email	Viewed Summary	Viewed Agreement	Executed Agreement	Approved Users	Entered VDR	Downloaded Docs	Tours Scheduled	
Q Search	Email Campaigns	From 03/06/2025	To 04/06/2025	Show RCM Activity	Activity on user's behalf	Viewed Email	Chart	Export		
Name	Company	Email	Phone	Industry Role	Action	Source	Campaign	Date	Notes	
1027 Ventures LLC	1027 Ventures LLC	1027 Ventures LLC	1027 Ventures LLC	Principal	Viewed Executive Summary	Email	Teaser	04/01/2025, 12:33 PM	0	
1027 Ventures LLC	1027 Ventures LLC	1027 Ventures LLC	1027 Ventures LLC	Principal	Viewed Agreement	Email	Teaser	04/01/2025, 12:34 PM	0	
Acadia Realty Trust	Acadia Realty Trust	Acadia Realty Trust	Acadia Realty Trust	Principal	Viewed Executive Summary	Email	Teaser	03/27/2025, 07:12 AM	0	
Acadia Realty Trust	Acadia Realty Trust	Acadia Realty Trust	Acadia Realty Trust	Principal	Viewed Executive Summary	Email	Teaser	03/27/2025, 07:13 AM	0	
Adler Real Estate Partners	Adler Real Estate Partners	Adler Real Estate Partners	Adler Real Estate Partners	Principal	Viewed Executive Summary	Email	Teaser	03/26/2025, 01:50 PM	0	

Questions? Contact Us at clientservices@lightbox.com



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Agreement Report

Use this report to quickly identify and prioritize serious buyers by reviewing who has executed the agreement and accessed key deal documents—enabling your team to focus outreach on the most engaged prospects.

- 1 Search by company or user’s first/last name.
- 2 View files that have been downloaded. Click the number to see which files have been viewed/downloaded and when.
- 3 View/print Investor’s executed Confidentiality Agreement.
- 4 Choose your agreement options. EX: one entry per company.
- 5 Create Custom Columns for your report.
- 6 Export the report to PDF or Excel.

Name	Company	Phone	Email	Industry Role	Files	Agreement	Date	Security	Tour Date	Notes	Called	POC for Calls	Buyer Ranking
View Profile	Baker Equity Holdings, LLC	(714) 853-8815	baker@baker-equity.com	Broker	4	Executed (Update)	06/24/2019...	Low	Add a Tour	2	Yes	View Profile	3
View Profile	Beitel Group	(714) 853-8815	beitel@beitel.com	Principal	0	Executed (Update)	01/06/2025...	Pending	Add a Tour	0	Yes	View Profile	3
View Profile	BLOK Group, Inc.	(888) 313-2345	info@b-ok.com	Broker	0	Executed (Update)	01/16/2018...	Low	Add a Tour	0	No	View Profile	1
View Profile	BREIS	(714) 853-8815	breis@breis.com	Unqualified Prin...	3	Executed (Update)	05/04/2022...	Low	Add a Tour	2	Yes	View Profile	2
View Profile	Brookside Properties, Inc.	(714) 853-8815	brookside@brooksideproperties.com	Broker	0	Executed (Update)	07/11/2017...	Low	Add a Tour	0	No	View Profile	2
View Profile	Brookwood Group	(714) 853-8815	brookwood@brookwoodgroup.com	Principal	4	Executed (Update)	01/28/2018...	Low	Add a Tour	2	Click to enter	Click to enter	Click to enter
View Profile	CBRE	(408) 715-2321	www.cbre.com	Broker	6	Executed (Update)	02/12/2018...	Low	Add a Tour	1	Click to enter	Click to enter	Click to enter
View Profile	Century 21 Intown	(714) 853-8815	info@century21intown.com	Broker	24	Executed (Update)	03/05/2020...	Low	Add a Tour	1	Click to enter	Click to enter	Click to enter

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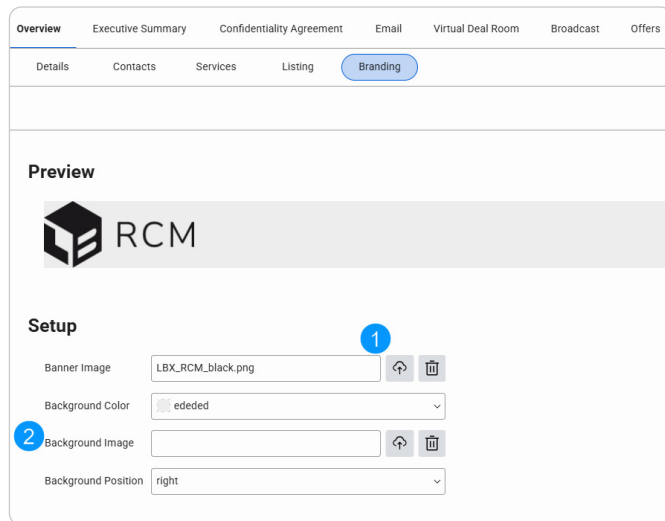
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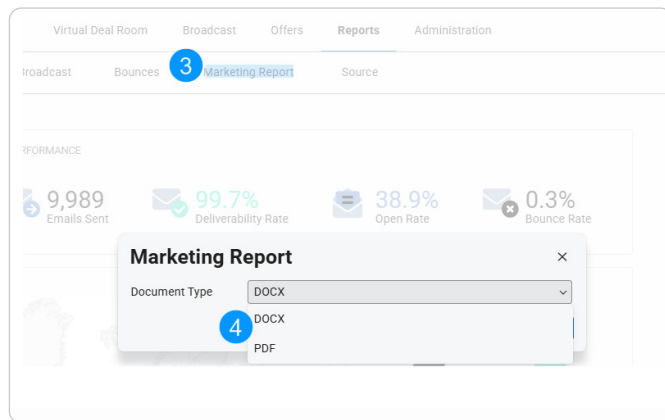
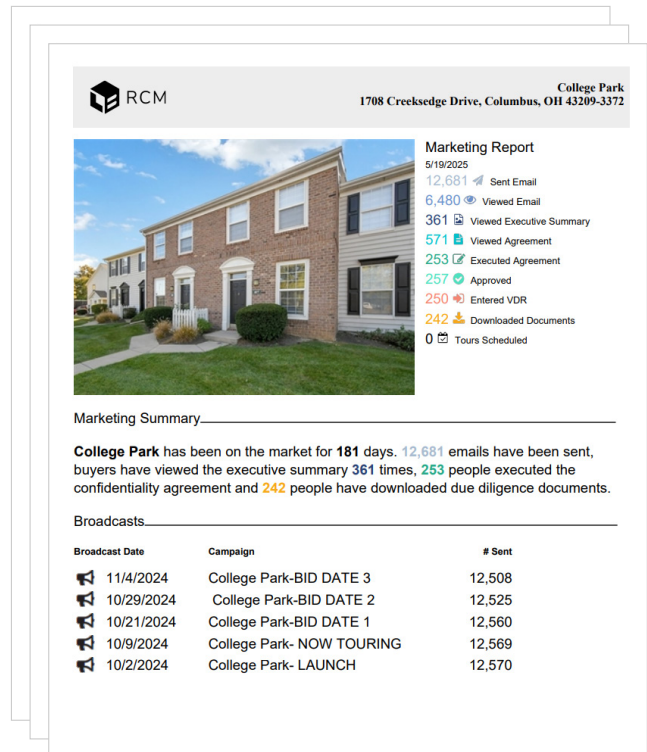


Creating a Branded Marketing Report

Effortlessly create a branded marketing activity report that impresses your client with clear insights into investor engagement and campaign performance



- 1 Under Overview -> Branding, upload your company logo.
- 2 Optionally update the report's background color, image, and position.
- 3 Go to Reports -> Marketing Report
- 4 Choose PDF or DOCX (to further edit document prior to sending to seller)

College Park
1708 Creeksedge Drive, Columbus, OH 43209-3372

Marketing Report
5/19/2025
12,681 Sent Email
6,480 Viewed Email
361 Viewed Executive Summary
571 Viewed Agreement
253 Executed Agreement
257 Approved
250 Entered VDR
242 Downloaded Documents
0 Tours Scheduled

Marketing Summary

College Park has been on the market for 181 days. 12,681 emails have been sent, buyers have viewed the executive summary 361 times, 253 people executed the confidentiality agreement and 242 people have downloaded due diligence documents.

Broadcasts

Broadcast Date	Campaign	# Sent
11/4/2024	College Park-BID DATE 3	12,508
10/29/2024	College Park-BID DATE 2	12,525
10/21/2024	College Park-BID DATE 1	12,560
10/9/2024	College Park- NOW TOURING	12,569
10/2/2024	College Park- LAUNCH	12,570

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