



How to Invite a Client

Your clients are automatically invited to HomeHub when you close a transaction. When your transaction gets moved into pending your client will receive their invite to HomeHub 48 hours later. However, there may be occasions when you will want to invite your client to the platform early. Maybe you would like them to see your list of trusted professionals as they are getting ready to move, or maybe they need a mortgage and you want to show them the brokerage lenders. You can invite your client to the platform when you are ready!

Step 1: From your agent dashboard, select Invite Client.

The screenshot shows the HomeHub agent dashboard for Jane Smith. The 'Invite Client' button is highlighted with a green circle. The dashboard includes three summary cards for invite statistics and a table of client activity.

Name	Concierge	Invited	Moving date	Status	Action
Details Tom Shively	Details Archie Bradshaw	03/17/2022	03/04/2022	In Progress	...
Details Niraj Patel	Details Archie Bradshaw	03/17/2022	12/01/2020	Signed up (Direct)	...
Details Tom Shively	Details Kenneth Strong	03/16/2022	02/01/2020	Signed up (Direct)	...
Details Kathie Allen	Details Andrew Pritchard	03/16/2022	03/01/2018	Signed up (Direct)	...
Details Shankar	Details Jeff Nevers	03/16/2022	04/15/2022	Signed up (Direct)	...
Details Regina	Details Matt Brownfield	03/16/2022	03/31/2022	Signed up (Direct)	...
Details Lskjfd Slskd	Details Jacoby Hughes	03/16/2022	03/23/2022	Signed up (Direct)	...
Details Austin Johnson	Details Matt Brownfield	03/14/2022	03/01/2022	Signed up (Direct)	...
Details Stephanie Test	Details Archie Bradshaw	03/14/2022	03/26/2022	Signed up (Direct)	...
Details Tom Shively	Details Jacoby Hughes	03/14/2022	02/01/2020	Signed up (Direct)	...

Step 2: Fill out your Client's information, including their email and phone number.
*Please note: If an Agent has that client they just have to hold close to their vest, be assured that they can privately add the client themselves (or their ASC can assist them with this). Each Agent has their own unique online instance and app that is exclusively private to them to ensure their client's privacy. Agents have the ability to customize the email content for each client if they prefer as well as add their email signature and more.

The screenshot shows the 'New Buyer' form in the 'YOUR BROKERAGE' system. The user is Jane Smith (614) 123-1123. The form is partially filled with client information:

- Personal Details:**
 - First Name: Tom
 - Last Name: Shively
 - Email: Tom+test@moveeasy.com
 - Telephone: 510-555-1234
- MOVING DETAILS:**
 - Moving From: Enter Source Address
 - Moving To: Enter Destination Address
 - Move Date: MM/DD/YYYY
- Message:**
 - Email Subject: Jane Smith invites you to your Free Personal Moving Concierge
 - Email Content: As part of our unparalleled service, you have access to your own Jane Realty concierge for life dashboard! You can complete all your moving and home management related tasks like updating your utilities, booking movers, setting up your internet and cable as well as finding local home pros. First up - Click the button below to complete your registration to access your dashboard. You will also receive an introduction call and email from your assigned concierge in the next 48-72 hours to answer any questions you may have.

Step 2: Select Send Email.

The screenshot shows the 'New Buyer' form in the 'YOUR BROKERAGE' system, with the 'Send Email' button highlighted with a green circle. The form is now fully filled with client information:

- Personal Details:**
 - First Name: Tom
 - Last Name: Shively
 - Email: Tom+test@moveeasy.com
 - Telephone: 510-555-1234
- MOVING DETAILS:**
 - Moving From: 1772 Woodcrest Dr, Concord, CA 94521
 - Moving To: 846 Bricker Blvd, Columbus, OH 43221
 - Move Date: 03-31-2022
- Message:**
 - Email Subject: Jane Smith invites you to your Free Personal Moving Concierge
 - Email Content: As part of our unparalleled service, you have access to your own Jane Realty concierge for life dashboard! You can complete all your moving and home management related tasks like updating your utilities, booking movers, setting up your internet and cable as well as finding local home pros. First up - Click the button below to complete your registration to access your dashboard. You will also receive an introduction call and email from your assigned concierge in the next 48-72 hours to answer any questions you may have.