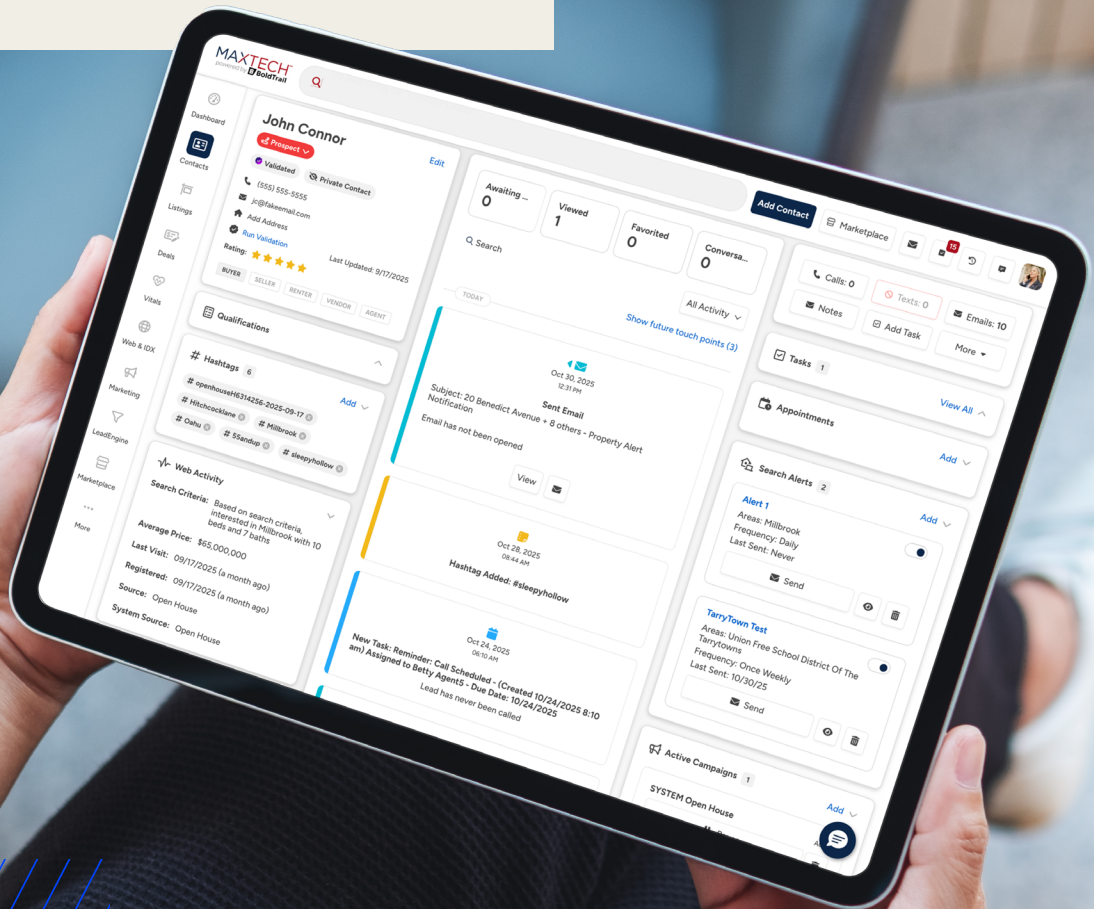




AGENT

TECH PLANNER



Master MAXTech® and develop daily best practices.

Welcome to the Agent Tech Planner

This digital planner is your go-to guide for exploring and using the full MAXTech suite – a collection of powerful technology solutions designed to support your business.

Whether you're new to these solutions or looking to level up your tech game, this resource breaks each one into manageable, actionable steps.

How to use this planner:

- Browse the table of contents on the next page and click the solution you want to explore.
- Read the overview to understand what the solution does and how it supports your business.
- Complete the quick-start tasks listed on that page to begin using the solution right away.
- Click “Return to Table of Contents” at any time to return to the beginning.

You don't need to finish this all at once. Tackle one page at a time and build sustainable habits with each technology as you go.

Ready to get started? Pick a solution on the next page, dive in and let the tech do the heavy lifting.

TABLE OF CONTENTS

Click the tiles below to jump ahead.

MAXCENTER®

MAXENGAGE™

MAXREFER™

MAXTECH®
powered by  BoldTrail

 folio
Powered by  BoldTrail

MaaS

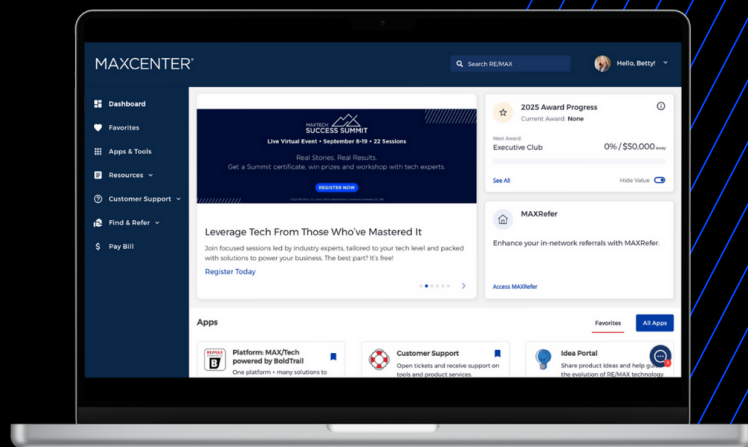
 **REMAX**
HUSTLE

Photofy

 **REMAX**
University

MAXCENTER®

MAXCenter® is your starting point for accessing the resources REMAX® has to offer! This is also home to your MAXProfile, where critical information related to your brand, MLS and service areas are configured.



1

SET UP YOUR MAXPROFILE

Your MAXProfile is your virtual persona within the MAXTech suite. Setting this up properly ensures your listings appear on remax.ca and that you are able to receive leads on those listings. It will also feed your information into many of the other solutions discussed in this planner.

Take the [Setting Up & Personalizing Your Agent MAXProfile course >>](#)

Click on your name in the upper right corner of MAXCenter to access your profile.

Upload a current and high-resolution headshot.

Add your contact information (specifically your email address and mobile number).

Complete your profile by adding your personal and professional details.

Confirm your MLS ID and Service Areas are correct.

2

DISCOVER CORE APPS

Visit the Apps & Tools section and locate the following solutions:



Learning & Education



Platform: MAXTech® powered by BoldTrail



Canadian Agent Broker Hub



Video & Social Content



MAXReferSM



MAXEngageSM



REMAX Marketplace



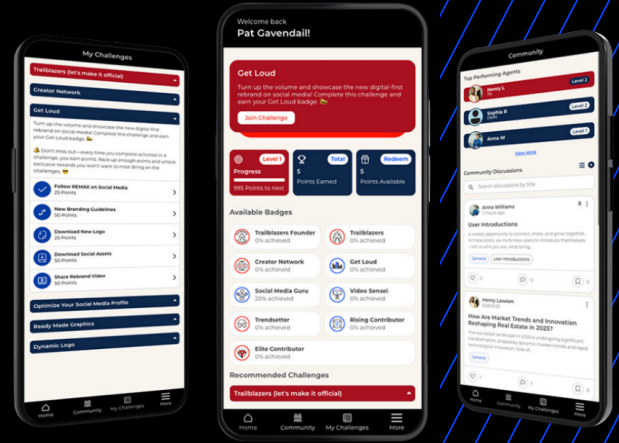
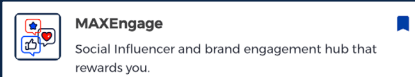
Children's Miracle Network Program



Customer Support

MAXENGAGESM

MAXEngage makes growing your business fun – and rewarding. Complete challenges, connect with other agents, and climb the global leaderboard while earning points to use towards real-life rewards along the way.



1

GET STARTED WITH MAXENGAGE

MAXEngage is the ultimate app to grow your business, boost your brand and stay plugged into the REMAX network through fun, rewarding challenges.

Download the app.

Log in with your remax.net credentials. All details in the app will pull from your MAXProfile, so you'll want to make sure it's up to date.

Accept the Terms & Conditions and follow along with the video tour of the app.

2

CONNECT WITH OTHER AGENTS IN THE COMMUNITY FORUMS

Explore the community forums within MAXEngage to connect with other REMAX agents, ask questions, post your wins and build new professional relationships.

Agree to the community guidelines in the navigation menu.

Explore the different topics available and comment, like or save a post.

Create your own user introduction post!

3

CHECK OUT CURRENT CHALLENGES

Start earning points to use towards real-life rewards by completing challenges.

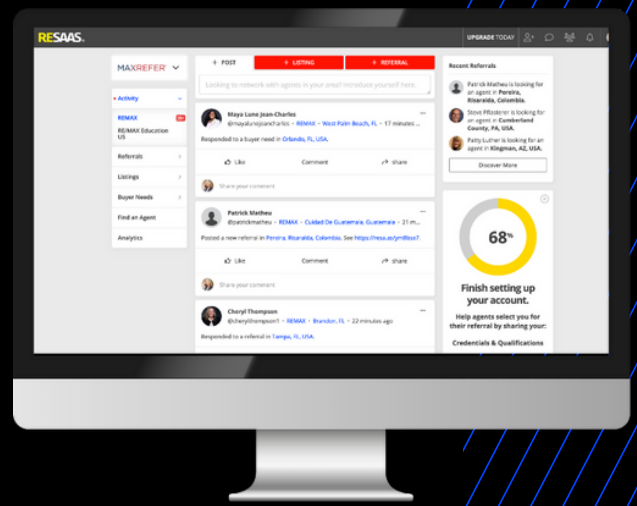
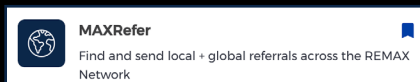
Pick a challenge to work on.

Start completing actions and uploading proof to earn points.

Climb the leaderboard and redeem your points for REMAX swag, 1-on-1 coaching and more.

MAXREFERSM

MAXRefer connects you with more than 145,000 REMAX associates worldwide to help you place and receive referrals with ease. Powered by AI and integrated into MAXTech[®] powered by BoldTrail, it makes finding the right agent, submitting opportunities, and tracking transactions seamless from start to finish.



1

UPDATE YOUR PROFILE

A complete and accurate profile helps other agents easily find you and trust you with their referral clients.

Review your profile to make sure all details have pulled correctly from your MAXProfile.

Add any specialties, languages spoken and service areas to help others find you if you haven't already added that information to your MAXProfile.

2

EXPLORE THE AGENT SEARCH

Learning how to search and filter within the platform saves time and helps you quickly connect your clients with the best-fit REMAX associates.

Use filters in MAXRefer to search for agents by location, specialty or language.

Practice searching for an agent in a market where clients may need support.

3

ENGAGE WITH REFERRALS

Actively engaging with referrals ensures you don't miss out on opportunities and helps you build strong business relationships.

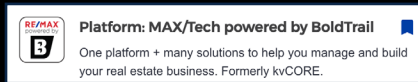
Browse open referrals in your area and submit your interest if you're a right fit.

Try entering a referral opportunity for a buyer or seller client to see how the process works, but remember to not submit it unless it is an official referral.

MAXTECH[®]

powered by **B BoldTrail**

A robust platform offering award-winning websites, lead management, Smart CRM, scheduled marketing, transactions integration, business intelligence and more.



1

GET THE INVITATION

Once your broker/owner invites you to onboard, you'll receive an email from Inside Real Estate at no-reply@boldtrail.com with details on how to access your new solutions.

2

COMPLETE THE AGENT LAUNCH CHECKLIST

Begin your onboarding journey by completing the steps in the in-platform Agent Launch Checklist.

Complete your profile by updating the information in your MAXProfile.

Download the MAXTech powered by BoldTrail Mobile App and Open House App within the platform.

Personalize your website.

Import your contacts.

Power up automation.

Generate new leads.

3

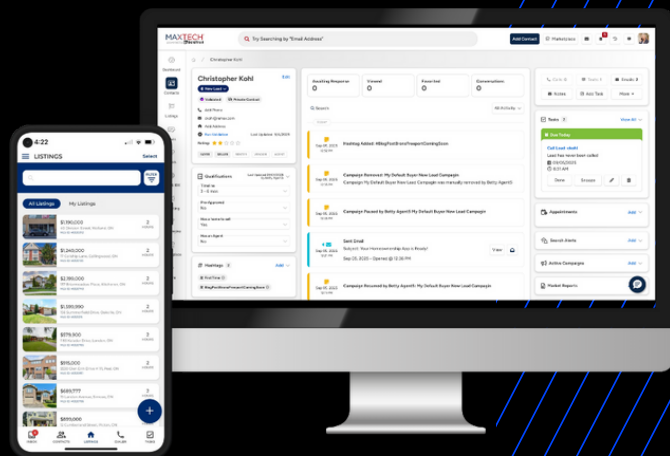
TAKE THE AGENT QUICK START COURSE

Get a jump start on MAXTech powered by BoldTrail with this Quick Start course.

Complete Inside Real Estate's [Agent Quick Start course >>](#) accessible via the in-platform Learning Portal to walk through key aspects of your new platform.

SMART CRM

Your MAXTech powered by BoldTrail Smart CRM is your database of contacts and where your lead conversion pipeline begins. Here, you'll find all of your clients' important information and can sort them by filters, add notes in their Contact Record, assign tasks and more!



1

ADD YOUR CONTACTS TO YOUR NEW DATABASE

The first step to taking advantage of your new Smart CRM is uploading your existing contacts to the platform. There are multiple ways to do this, depending on how you currently store your contacts including a manual bulk upload using a .csv file, connecting a Google or Outlook account to pull in your email contacts or taking advantage of Inside Real Estate's free Lead Import Service.

Read the [Importing & Exporting Your Contacts article >>](#) to learn how to import your contact list.

Successfully import your contacts using whatever method you choose.

2

ORGANIZE YOUR CONTACTS

Your Smart CRM allows you to organize your contacts in a way that works best for you and your unique business. Each of your contacts will have a contact record within your Smart CRM that includes a variety of organizational features to help you stay on track and connected.

Read the [Contact Record Overview article >>](#) to learn how to navigate Contact Records.

Make sure each contact's information is up to date. This is a great opportunity to reach out and check in!

Update each contact's lead type (Buyer, Seller, etc.) and status (Sphere, Prospect, Client, etc.).

Add relevant hashtags to better categorize your contacts by neighbourhood, hobbies, things you want to remember about them and more.

3

ADD ADDITIONAL INFORMATION

Take your contact records to the next level by adding additional information to the Profile Details section. Here, you can add details about their families, their birth dates, home anniversary dates and even their home search preferences if they are currently in the market.

Add your contacts' birth dates.

If they are a past client, add their home anniversary date.

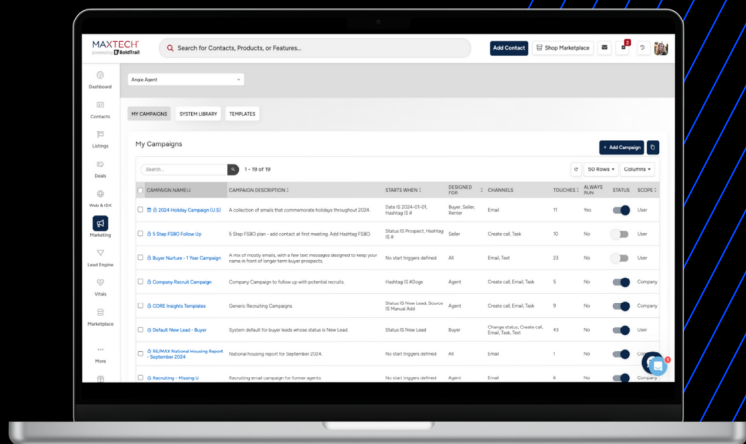
If they are a potential or current buyer, add any necessary home preferences and set up a Saved Search.

If they are a potential or current seller, set them up on a monthly Market Update report.

Add any familial details such as spouse/partner names and contact information.

SMART CAMPAIGNS

Smart Campaigns are designed to keep you in touch and top of mind with your clients. Use a default Smart Campaign provided by MAXTech powered by BoldTrail, edit one or even build your own! These Smart Campaigns will send messages to your contacts or remind you of important tasks.



1

LEARN MORE ABOUT SMART CAMPAIGNS

Before you can begin leveraging the power of Smart Campaigns, it is helpful to understand what they are and how they work.

Read the [Complete Guide to Smart Campaigns article >>](#) to learn more about using Smart Campaigns to streamline different aspects of your business.

2

REVIEW PRE-EXISTING SMART CAMPAIGNS

You have access to a wide range of pre-built Smart Campaigns that you can begin leveraging right away! Seven of these campaigns are turned on by default once you get started in the platform; however most of these only include task reminders to help hold you accountable. Regardless, it is highly recommended that you take a moment to review your default Smart Campaigns (specifically the New Buyer Lead and New Seller Lead campaigns) so you can understand how they work within your platform.

Review your default Smart Campaigns, including:

- Default Buyer
- Default Seller
- Default Contract Buyer
- Default Contract Seller
- Default Contract Renter
- Default Active Buyer
- Default Active Seller
- Default Active Renter

3

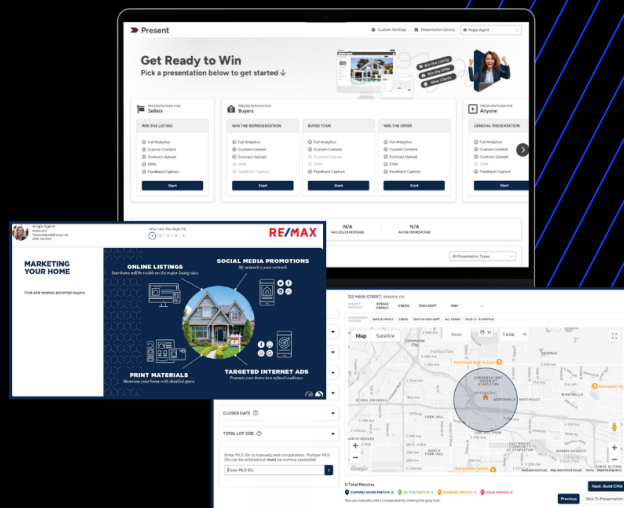
TURN ON ADDITIONAL CAMPAIGNS

There are even more pre-existing Smart Campaigns for you to use in the System Library tab of your Smart Campaigns manager. Use this opportunity to get to know these campaigns, add them to your own campaign library and brainstorm ideas for incorporating them into your business.

Review the campaigns in the System Library tab.

Choose two additional campaigns to add to your library and start leveraging.

Want to really impress your prospects and clients? Use Present as a convenient way to populate information from a Comparative Market Analysis (CMA) into slides a seller can browse through. Or build a listing tour for your buyers and wow your clients every time!



1

GET STARTED WITH PRESENT

Before you dive in and start creating CMAs and presentations with Present, there are a few small things you should do first:

Read the [Present General FAQs article >>](#) to learn more about what is available.

Customize and personalize your presentations in the Customization Settings section. Choose a default layout and update your About Me and Testimonials sections to streamline the presentation creation process in the future.

2

CREATE YOUR FIRST LISTING PRESENTATION + CMA

Present gives you the solutions you need to wow potential sellers and win the listing through engaging CMAs and fully customized, beautifully branded presentations with real-time activity tracking. Get to know the platform further by creating your first listing presentation.

Read the [Present: How to Create a Listing Presentation article >>](#)

Create your presentation using the address of one of your prospects, a past client or one of your current listings. These presentations can be useful for a variety of individuals in your sphere, not just potential sellers!

Work through the steps to customize the presentation for your chosen property.

Share your presentation! This could be to a friend, a staff member or a potential client. Use the activity tracking features to review which pages the viewer spent the most time on and brainstorm ways to leverage that information in the future.

3

CREATE YOUR FIRST BUYER TOUR

Gone are the days of printed MLS sheets! Buyer Tours are here to offer additional value to your buyers and level-up your showing days.

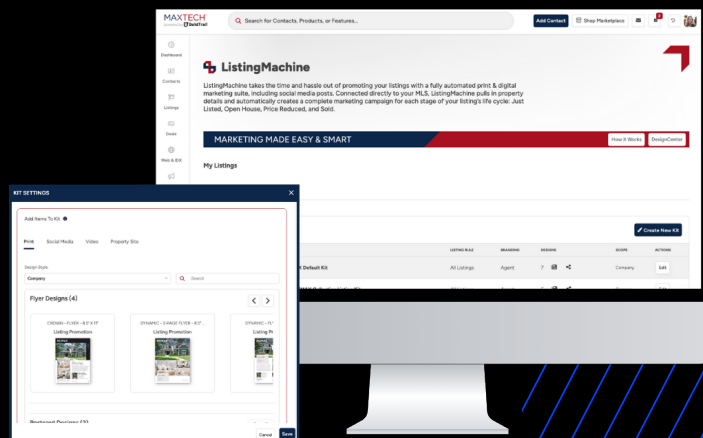
Create a Buyer Tour by adding the MLS IDs of the listings you intend to show.

Arrange the listings in the order you plan to show them.

Save your Buyer Tour and send it to your buyers at some point before your showing day, preferably the day before. Encourage them to look through it in advance and rate the properties on the provided scale.

On showing day, remove any properties they didn't want to see and print out a copy of your finished Buyer Tour so your buyers can take notes on each property as they look.

Consistently marketing your listings can feel like a chore. With ListingMachine, let MAXTech powered by BoldTrail do the work for you!



1

GET TO KNOW LISTINGMACHINE

ListingMachine can take the time and hassle out of promoting your listings with a fully automated listing marketing suite. However, before you dive in, make sure you understand how to use this solution to its full potential.

Read the [ListingMachine Overview article >>](#)

2

REVIEW YOUR PRE-EXISTING LISTING KIT

The moment you log into MAXTech powered by BoldTrail, you'll already have access to one, pre-created Listing kit. Use this opportunity to review that listing kit and see what kind of materials are already being created for your listings.

Review the REMAX Default Kit inside of ListingMachine.

3

CONNECT YOUR SOCIAL MEDIA ACCOUNTS

Once you have connected your social media accounts, ListingMachine will be able to automatically start posting listing information (such as new listing, price reduction, just sold, coming soon and open house announcements) on your behalf!

Connect your Facebook (Meta), LinkedIn, Twitter (X) and YouTube accounts to ListingMachine. Keep in mind that the platform cannot automatically post to Instagram for you, but will send the marketing materials directly to your phone so you can easily post them.

4

CREATE YOUR FIRST LISTING KIT

Now it's time to create your first listing kit. Take a moment to think about the type of kit that would work best for your business. Do you occasionally work with luxury properties? Are there types of marketing materials you would only want to create for those properties? Consider how you can leverage listing kits to work for your unique business needs.

Start building your first listing kit and choose which types of listings you want included and when you want marketing materials to be created.

Choose what types of materials you want created with this listing kit.

Start leveraging your listing kit. The platform will notify you every time materials are created as long as you have notifications turned on.

As ListingMachine's counterpart, find the perfect customizable template for any social media post, flyer or postcard. Choose from a REMAX-branded category to elevate your personal brand and promote your business.



1

GET TO KNOW DESIGNCENTER

DesignCenter is packed full of easy-to-customize digital and print marketing materials – all featuring you and your brand. But before you dive in, be sure you understand what this incredible solution has to offer!

Read the [DesignCenter Overview article >>](#)

2

CONNECT YOUR SOCIAL MEDIA ACCOUNTS

If you haven't already connected your social accounts to MAXTech powered by BoldTrail, now is the perfect time. Once completed, you'll be able to post your designs directly to social media right from DesignCenter.

Connect your social media accounts inside the Settings and Media Library section of DesignCenter.

3

START DESIGNING

Now it's time to get creative! Choose from DesignCenter's vast template library and start designing a marketing piece for one of your listings or to promote your business.

Choose which type of design you would like to create. DesignCenter has templates for flyers, postcards, door hangers, social media and more.

Select a design and begin customizing it.

Update any text you would like to change.

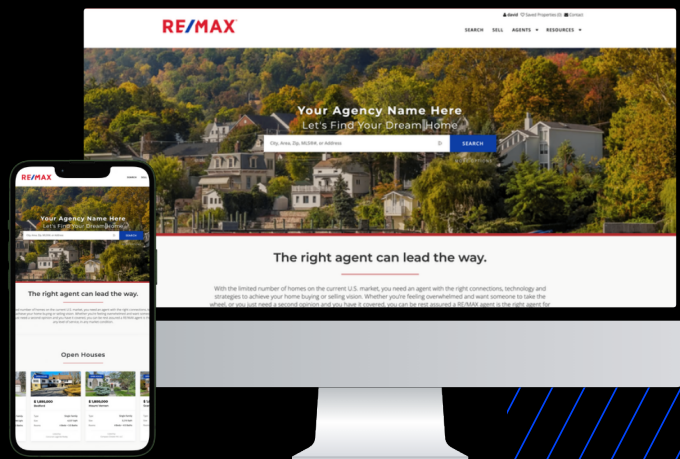
Swap out any photos you aren't happy with.

Make sure your contact information is correct.

Choose whether you would like to download and print your design yourself or want to use a commercial printing service. If you've chosen a social media graphic, you'll be able to download it or post it to your social media accounts directly from here.

WEB & IDX

Your MAXTech powered by BoldTrail website is out of the box, beautifully branded and ready to go on day one! Use your website to highlight your business and listings, add value to your audience and capture new leads. Keep your website as is or customize it to better fit your unique business.



1

LEARN MORE ABOUT YOUR WEBSITE

While your MAXTech powered by BoldTrail website is ready to go on day one, there are still a few things you can do to truly customize it to your brand and business. Take a moment to review your website's capabilities before you begin making it your own.

Read the [Editing Your Website article >>](#)

2

CHANGE YOUR WEBSITE APPEARANCE

When customizing your website, you'll be able to change several things to help build your brand directly into your website, including the text, header image, widget layout, navigation and more.

Add your own header image.

Update the home page widget layout to one that works best for your business goals.

Add your personal logo that will appear along side the official REMAX logo.

Update the listing carousels to showcase the types of listings you want to promote.

Include testimonials from past clients that showcase your value proposition.

3

UPDATE YOUR SERVICE AREA PAGES

Local area pages are one of the best ways to improve your search engine ranking and offer value to your audience. Luckily, your MAXTech powered by BoldTrail website can easily create these pages using the information provided by your MLS.

Add as many service areas to your website as you like, but keep in mind that an area name must be included in your MLS in order for a page to be created.

Customize each page by including a description of each area and by adding additional, relevant content such as a video of the area, ideas on things to do, your own photos and more.

4

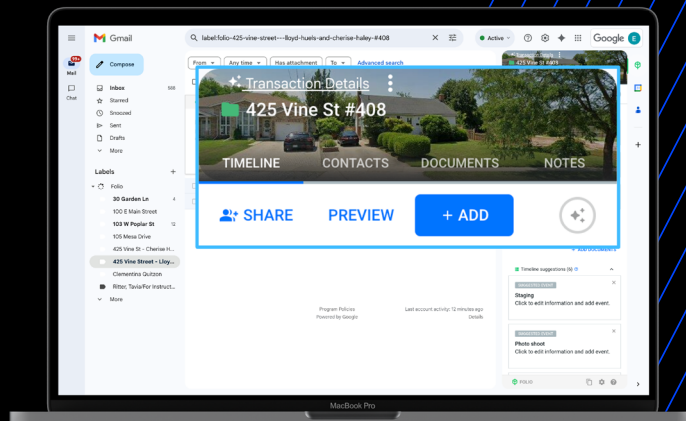
CREATE NEW PAGES

You can create multiple custom web pages that engage and inform your audience. These pages should provide value to local consumers and consistently drive traffic to your website.

Create two new pages for your website. Ideas for these pages could be buyer or seller guides, local event roundups, information on the local real estate market and more.



Keep important transaction emails and timelines organized with this AI-powered email productivity solution. Serving as your email smart assistant, Folio intelligently organizes your inbox, manages transaction conversations and shares consumer-facing transaction timelines to keep your clients informed.



1

GET THE INVITATION

Before you can get started with Folio, you'll need to be invited! You will receive an email from folio@amitree.com with instructions on setting up your account.

Receive an invitation by email from folio@amitree.com and follow the included instructions to integrate Folio with your Gmail or Outlook account.

2

WATCH A FOLIO WEBINAR

Get introduced to Folio and see first-hand how it can help you stay organized and reduce any stress during the transaction process by watching an on-demand webinar from Inside Real Estate.

Watch the on-demand [Folio webinar >>](#)

3

FULLY LEVERAGE FOLIO

If you are using a Gmail account, download the Folio Chrome extension to your browser so you can manage your transactions right from your inbox.

If you are using an Outlook account, manage your transactions on the desktop website: amitree.com/folio.

4

SET YOURSELF UP FOR SUCCESS

Make sure you are taking care of your future self by:

Creating timeline templates to save time.

Adding local resources and trusted vendors to those templates that clients can lean on.

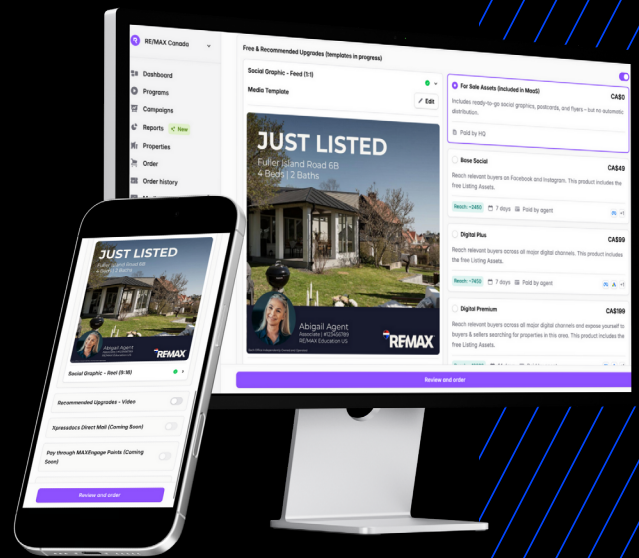
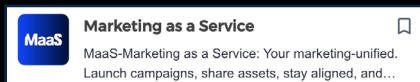
Adding local service providers and utilities that clients can reference.

Connecting cloud storage for seamless document sharing.

Verifying your profile information.

MaaS

Marketing as a Service (MaaS) is your one-stop-shop for your marketing needs, giving you more time back to focus more on winning listings and building a strong, lasting business. This evolving solution supplies you with marketing assets and campaigns powered by AI and comprehensive REMAX data to deliver the best results.



1

GETTING STARTED & ACCESSING MAAS

As a member of REMAX, you already have access to the Marketing as a Service platform, no need to sign up or take any additional actions to get started.

Access the platform via MAXCenter.

Keep an eye out for email notifications letting you know when marketing opportunities are available.

2

UTILIZING MAAS

Start folding MaaS into your regular marketing routine.

View user activity, campaign metrics and launch your own campaigns.

Customize your assets using the REMAX-branded templates to easily tailor your marketing materials to fit your unique style.

Download complimentary assets or launch paid ad campaigns across Meta (Facebook & Instagram), Google Display Network and Google Search for an additional cost.

3

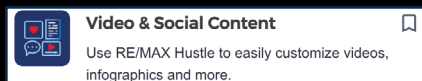
STAY UPDATED ON UPCOMING RESOURCES

MaaS is designed to evolve with new marketing solutions and resources being added regularly.

Read your REMAX Update emails for information on MaaS additions and your other tech solutions.

REMAX HUSTLE

REMAX Hustle helps you quickly and easily create videos to market your brand and listings, connect with members of your community and personalize national ad campaign commercials.



1 DISCOVER REMAX HUSTLE

Take the [Getting Started With REMAX Hustle course >>](#)

2 EXPLORE THE PRE-MADE VIDEO TEMPLATES

Review the library of pre-made video templates designed to promote yourself, your brand and even show support to your community.

Click into a template and begin adding customizations like your name and contact information.

Once you have finished customizing your video, download the video to your computer to post on social media, share on your website and more.

3 BUILD A VIDEO FROM SCRATCH

Don't see a video template that fits your specific business needs? The Hustle Video Editor allows you to create a video with your own photos and video clips. Add music, stickers and more to create a video that shows off your community, offers an inside look into a new listing or highlights your expertise.

Create a video with the Hustle Video Editor.

4 CREATE CUSTOM GRAPHICS

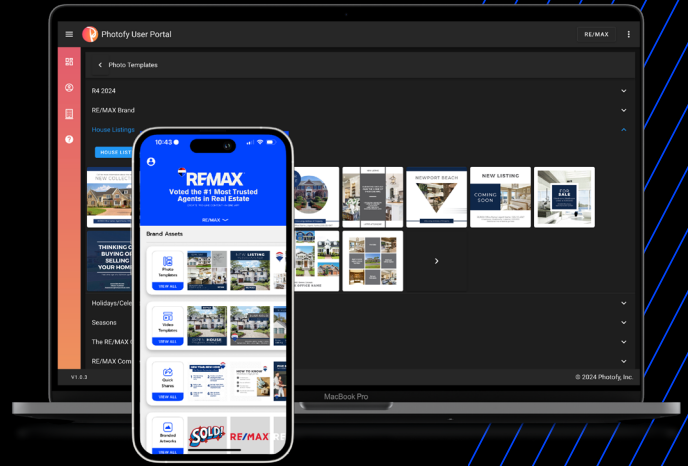
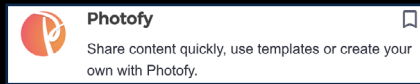
REMAX Hustle offers more than just videos. Use this handy solution to create custom graphics to share on social media or directly with your clients.

Create a Hustlegraphic that outlines your career wins from the past year.

Send a Digital Welcome Mat to welcome your new clients or to congratulate your buyers on a new home.



Maximize your social media strategy with Photofy. Access a collection of branded graphics and templates to help promote your brand, listings, holidays and more for \$8.25 USD a month or \$99 USD annually.



1

DISCOVER PHOTOFY

Before you dive into using Photofy, you'll need to create an account. Download the Photofy app and explore the Desktop Creator.

Watch the [Downloading the Photofy App + Creating Your Account video >>](#)

Sign up and install Photofy.

Watch the [Photofy Desktop for Agents video >>](#)

2

DEVELOP A ROUTINE

Take a photo every time you enter a home and write a constructive post about the experience. Use Photofy to show off your staging, great landscaping, favorite architectural feature or any other noteworthy aspect.

Fine-tune your social media strategy by taking time each week to review which of your posts performed best. You can use the Photofy Desktop Creator to view analytics of all your past posts.

Explore new hashtags to discover new communities and take time to highlight them on social media. Think of new ways to improve your imagery, templates or wording.

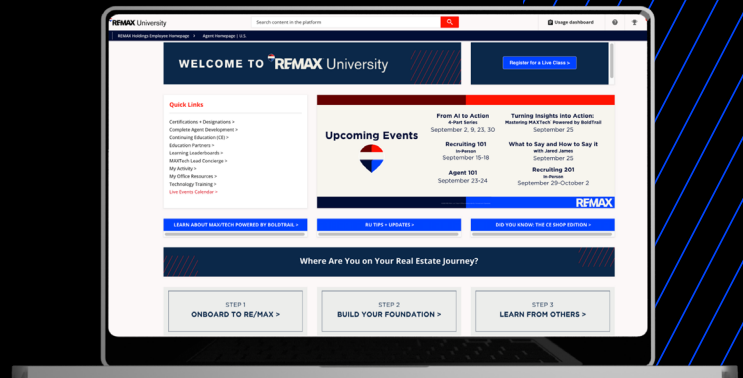
Use Photofy's vast template library to celebrate special holidays. Use the post scheduler in the Photofy Desktop Creator to schedule your posts in advance.

Engage your peers by seeing which agent in your office can get the most likes on a post. Have a contest and choose a fun prize for the winner. Who can collect the most smiles?



REMAX University® is your home for any continuing education in real estate, technology and business support. It houses certifications and designations as well as access to nationally recognized real estate and productivity coaches.

**Learning & Education**
Access videos, resources, designations and more in RE/MAX University.



DISCOVER REMAX UNIVERSITY

The real estate industry is always changing, and the best agents never stop learning. By investing in your growth, you stay ahead of market shifts, adapt to new technology and deliver more value to your clients. Take the next step in your growth journey and dive into REMAX University today.

Access REMAX University via MAXCenter.

Download the REMAX University app from your mobile device's app store.

Explore REMAX University via the guided tour [Getting Started in REMAX University as an Agent course >>](#)

Register for an upcoming [Learning & Development Session >>](#) such as Agent 101 or Technology Foundations!

CUSTOMER SUPPORT

Need help or have a question? Don't hesitate to reach out to Customer Support.



TEXT OR CALL

1.888.398.7171



EMAIL

customersupport@remax.net



LIVE CHAT

Visit the Customer Support tile within MAXCenter

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