



## CLICK ON THE "DOCUMENTS" TAB

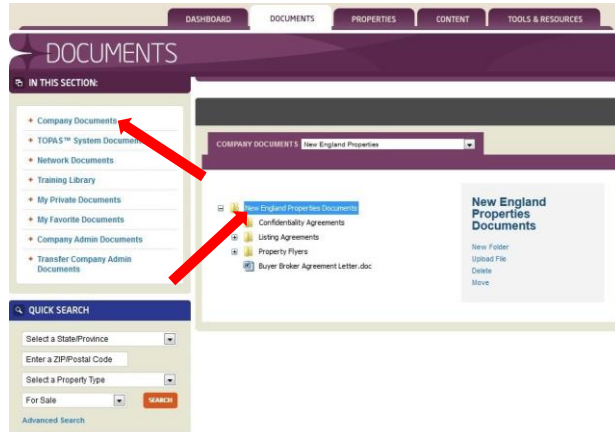
The screenshot shows the ORION COMMERCIAL SERVICES website dashboard. At the top, there is a navigation bar with tabs for 'DASHBOARD', 'DOCUMENTS', 'PROPERTIES', 'CONTENT', and 'TOOLS & RESOURCES'. A red arrow points to the 'DOCUMENTS' tab. Below the navigation bar, the dashboard is divided into several sections:

- QUICK SEARCH:** Includes fields for 'Select a State/Province', 'Enter a ZIP/Postal Code', 'Select a Property Type', and 'Pop Size'.
- CLOSING TRANSACTIONS:** A bar chart showing sales from Oct to Feb. A red arrow points to the 'DOCUMENTS' tab above this section.
- ACTIVE ASSIGNMENTS:** A bar chart showing active assignments from Aug to Jan.
- UPCOMING EXPIRATIONS:** A list of properties with their expiration dates, including Tampa Office Site, Seattle Space Needle, Tampa Office Site 02, Lake City Development Trust, Tampa Office, and 45 Summer Lakes Professional Centre.
- NEWS & ANNOUNCEMENTS:** A list of news items with dates and authors, such as 'How One Idea Made \$45,000 for a Commercial Broker'.
- REAL ESTATE NEWS:** A list of real estate news items, such as 'Svensk Builder Puts Its Hooks in U.S. Office Market'.
- MATCH LIST:** A list of properties with images and details, such as 'Lake City Development Trust'.
- FAVORITE DOCUMENTS:** A list of favorite documents, such as 'Lake Professional'.
- BIRTHDAYS & ANNIVERSARIES:** A section for birthdays and anniversaries.



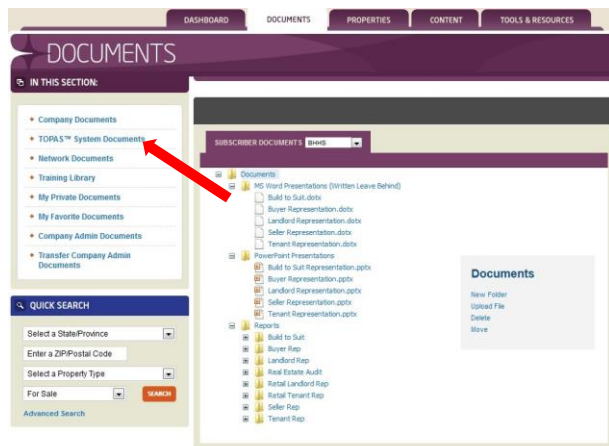
## THE "COMPANY DOCUMENTS" FOLDER

- Clicking on the **Documents Tab** will always open your Company Documents Folder.
  - The same thing will happen if you click on "Company Documents" in the Tools & Resources section.
- Your **Company Documents** folder is the place to go for ALL the Agreements, Forms, Systems and Templates your company wants you to use.
- Only Users from your company can see your **Company Documents** folder.
- You Company Admin., with direction from your leadership team, will create folders or subfolders and load any documents into your **Company Documents Folder**.



## "TOPAS™ SYSTEM" FOLDER

- The "**T.O.P.A.S.™ System**" folder is where you will find the **ORION Process & Accountability System** Presentations, Forms, Templates, Data sheets and Checklists you'll need.
- For more on this valuable tool, see the Training Library.
  - Everything in this folder is visible to and usable by all Users in Tier II subscribing companies.



## “NETWORK DOCUMENTS” FOLDER

- The “**Network Documents**” folder is where you’ll find special forms and documents that the Franchisor want to make available to your team from time to time.

The screenshot shows the ORION COMMERCIAL SERVICES, LLC DOCUMENTS interface. The top navigation bar includes DASHBOARD, DOCUMENTS, PROPERTIES, CONTENT, and TOOLS & RESOURCES. The main header is DOCUMENTS. Below it, there's a section titled "IN THIS SECTION:" with a list of folders: Company Documents, TOPAS™ System Documents, Network Documents (highlighted with a red arrow), Training Library, My Private Documents, My Favorite Documents, Company Admin Documents, and Transfer Company Admin Documents. Below this is a QUICK SEARCH section with dropdowns for State/Province, ZIP/Postal Code, Property Type, and For Sale, along with a SEARCH button and an Advanced Search link. The main content area shows the NETWORK DOCUMENTS folder, which contains a sub-folder named Documents and a file named 0311 Tax Briefing For 2014.pdf. A sidebar on the right has a Documents section with options: New Folder, Upload File, Delete, and Move.



## “TRAINING LIBRARY” FOLDER

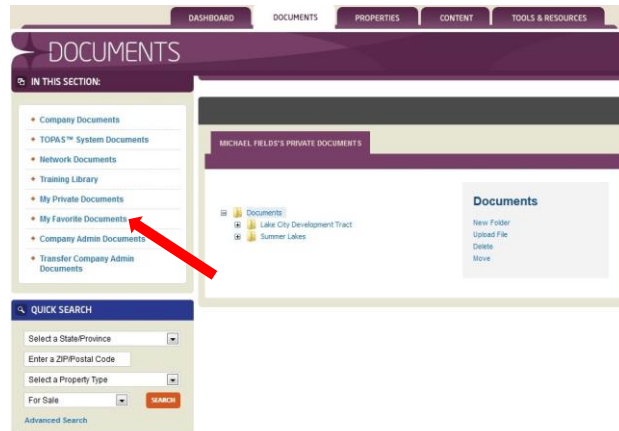
- The “**Training Library**” is where you can find all of the many and varied training programs including:
  - A list of all of the 3<sup>rd</sup> party CIE type sites that the system will feed your listings out to.
  - C.R.E.S.T.™ 26 module, mentored, self-study program for CRE.
  - Market Updates
  - CRE Fundamentals training including:
    - 30 Days New Assoc. training
    - Glossaries
    - Recorded Webinars
    - Leasing Course
  - Web Site Basics
  - Sales Training

The screenshot shows the ORION COMMERCIAL SERVICES, LLC DOCUMENTS interface with the TRAINING LIBRARY folder selected. The top navigation bar is the same as in the previous screenshot. The "IN THIS SECTION:" list now includes Training Library (highlighted with a red arrow). The main content area shows the TRAINING LIBRARY folder, which contains a sub-folder named Documents (highlighted with a red arrow) and a list of training materials: 3rd Party Listing Syndicator, 3rd Party Listing Syndicator, BHSICRE.com, CERIC, Commercial REALTOR.com, ePropertyData, PropertyLine, PropertySearch, Realp, RCFO, XorAgent, C.R.E.S.T. Program, C.R.E.S.T. Program, PPT Slide Notes, Recorded Web Modules, Workbook/MiniPrg, Market Updates, MARKET UPDATES, ORION CRE Institute, Int. 30 Days Program, CRE Fundamentals Webinars, Leasing Course, ORION Web Site Basics, Company Addresses, Sales Professionals, 01 - Logging In & Editing Your Profile.aspx, 02 - Dashboard Tour.aspx, 03 - Documents Tab.aspx, 04 - Properties Tab.aspx, 04 - Properties Tab.aspx, 04 - Training & New Listing.aspx, and Sales Skills. The sidebar on the right is the same as in the previous screenshot.



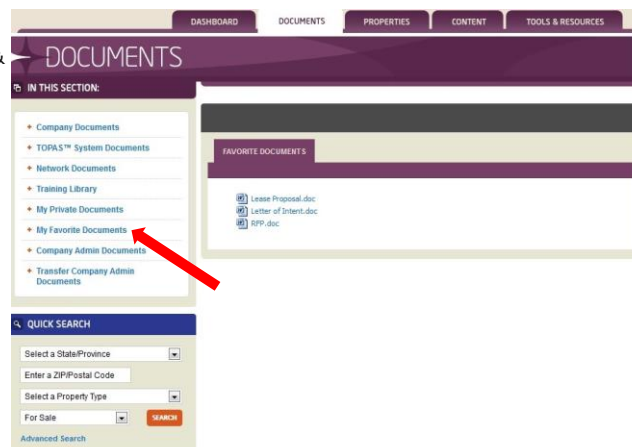
## "MY PRIVATE DOCUMENTS" FOLDER

- The **"My Private Documents"** folder is a place to store your working deal files that you may need access to while away from your office.
- No one can see or access these files (except System Administrators & the FBI).
- Once a deal has been completed or is dead, please remove these files/folders to another storage location so as not to overburden the system's storage capacity.



## "MY FAVORITE DOCUMENTS" FOLDER

- Together, your Company Docs folder & the rest of the system contains many thousands of Commercial Real Estate:
  - Systems
  - Processes
  - Forms
  - Templates
  - Training Materials
  - Recorded Webinars
  - Presentations, etc.
- Those you use frequently can be designated as your **"Favorites"** and will appear on your **Dashboard** as well as in your **"My Favorite Documents"** folder.



## Transfer Company Admin Docs

- You won't be able to see this folder either – so don't worry about it.
- This is where your leadership team will go to transfer these hidden documents to your Company Documents folder.
- More about this in the Company Admin training later.

The screenshot displays the 'TRANSFER COMPANY ADMIN DOCUMENTS' interface. On the left, a sidebar lists various document categories, with a red arrow pointing to 'Transfer Company Admin Documents'. Below this is a 'QUICK SEARCH' section with fields for State/Province, ZIP/Postal Code, Property Type, and For Sale, along with a 'SEARCH' button. The main content area is divided into 'Source' and 'Destination' sections. The 'Source' section shows a tree view of folders including Business Forms, Admin, Blue File, Business Brokerage, Confidentiality, Consulting Agt, Consulting Agreement Long.doc, Consulting Agreement02.doc, Consulting Agreement03.doc, Contracts & Leases, Disclosure, Escrow, Form Letters, Listing & Commission Agreements, Marketing Plan, Planning, Property Profiles, Proposals & LOI, REA, Referral, Under Contract, Lease Versus Own Analysis V 4.1 (2).xls, Tenant Application.xls, New Docs, and State Forms. The 'Destination' section has a dropdown menu set to 'Florida Properties Group'. At the bottom, there are three numbered instructions: 1. Check the source files that you want to copy. 2. Choose the destination folder to copy to. 3. Click 'COPY'.

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## Company Admin Docs Folder

- Nothing for you to worry about here. You won't even be able to see this folder.
- Your leadership team will have access to the **Company Admin Documents** folder.
  - Here they will find hundreds and hundreds of templates, systems, processes and forms that they can review, edit if necessary and easily move to a folder in your Company Docs folder making them available for your use.

The screenshot shows the 'DOCUMENTS' section of the ORION interface. The top navigation bar includes 'DASHBOARD', 'DOCUMENTS', 'PROPERTIES', 'CONTENT', and 'TOOLS & RESOURCES'. The main header is 'DOCUMENTS'. Below it, a sidebar lists document categories, with a red arrow pointing to 'Transfer Company Admin Documents'. The main content area is titled 'COMPANY ADMIN DOCUMENTS' and shows a tree view of folders including Documents, Business Forms, Admin, Blue File, Business Brokerage, Confidentiality, Consulting Agt, Contracts & Leases, Disclosure, Escrow, Form Letters, Listing & Commission Agreements, Marketing Plan, Planning, Property Profiles, Proposals & LOI, REA, Referral, Under Contract, Lease Versus Own Analysis V 4.1 (2).xls, Tenant Application.xls, New Docs, and State Forms. On the right, a 'Documents' sidebar offers options: 'New Folder', 'Upload File', 'Delete', and 'Move'.

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## Questions

- See your Company administrator
- Go to [www.orioncre.com/support](http://www.orioncre.com/support)