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Compass

Version 2.1

Tips and Tricks

Nationwide Multifamily Data

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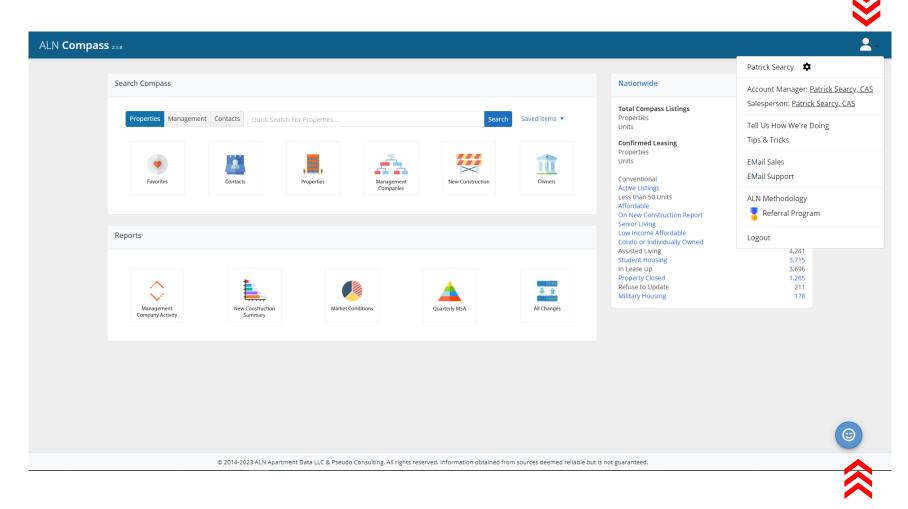
Call 1-800-643-6416 and dial ext. 3 for sales or

Email Success@alndata.com

Compass Home Page Tips

Property and unit counts change daily

Find your Account Manager, Salesperson, Tips & Tricks, Referral Program, and more

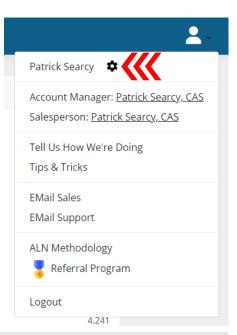


On most pages, you'll see Mr. Tipster, our helpful tool for showing tips for the page you're currently on

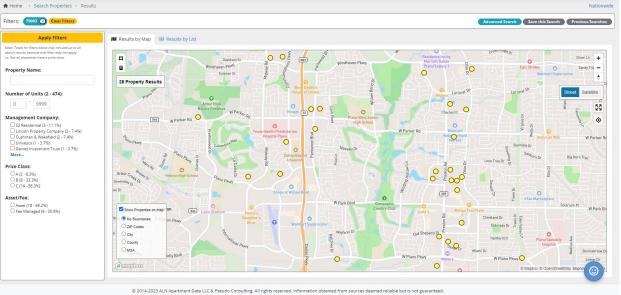
Compass Home Page Tips

Property and unit counts change daily

- Click the profile icon and then the setting gear
- Here you can set your results preference for Properties and Management Companies

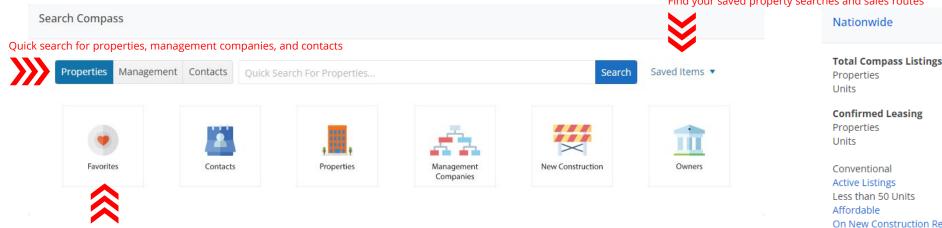


	Management Companies	New Construct	ion	Owners	
	User Preferenc	es		×	
	Preferred Prope	erty Results:	Мар	•	
	Preferred Mana	gement Results:	List	•	
		Done	2		
et Conditions		Quarterly MSA		All Changes	



Compass Home Page Tips

Property and unit counts change daily



Find all your favorited properties and management companies

Find your saved property searches and sales routes

Total Compass Listings	
Properties	183.88
Units	24,143,50
Confirmed Leasing	
Properties	144,71
Units	18,075,79
Conventional	112,79
Active Listings	78,30
Less than 50 Units	46,74
Affordable	33,87
On New Construction Report	27,90
Senior Living	21,54
Low Income Affordable	14,96
Condo or Individually Owned	7,09
Assisted Living	4,23
Student Housing	3,71
In Lease Up	3,43
Property Closed	1,26
Refuse to Update	21
Military Housing	17

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Click on any hyperlinked category to open a prepopulated property search for those categories

Compass Home Page

Property and unit counts change daily

• Total Compass Listings

- This is the total number of properties and units in our entire database, including properties that are currently being researched
- This is not meant to be a sum of the property segments listed on above on the home page

Confirmed Leasing

- This is the total number of properties and units in our entire database that we can confirm are multifamily properties
- This is not meant to be a sum of the property segments listed on above on the home page

Nationwide

Total Compass Listings Properties Units	183,889 24,143,504
Confirmed Leasing Properties Units	144,714 18,075,792
Conventional	112,799
Active Listings	78,308
Less than 50 Units	46,742
Affordable	33,878
On New Construction Report	27,905
Senior Living	21,547
Low Income Affordable	14,966
Condo or Individually Owned	7,097
Assisted Living	4,237
Student Housing	3,711
In Lease Up	3,430
Property Closed	1,263
Refuse to Update	210
Military Housing	177

Property Segment Definitions

Active Listings	Multifamily properties with 50 or more units that are not HUD subsidized and are not an assisted living property. Property types include Conventional, Mixed Residential, Senior Affordable and Independent Living, Affordable Housing, and Student Housing. Only these properties are contacted for updates on ALN's 25-business day cycle.
Condos or Individually Owned	Properties that ALN knows to be fully individually owned condos, and do not lease. ALN does list condo units available for lease if operated as a group by a fee management firm, but units fitting that description are not included in this property type. A notation in a property's unit mix would denote condo units for lease.
On New Construction Report	New construction projects for all multifamily product types. Project statuses range from pre-construction to properties that are in lease-up, but not yet stabilized. Properties that have started pre-leasing will be updated every month until stabilized.
In Lease Up	Leasing, but not yet stabilized
Less than 50 Units	Properties with less than 50 units. Properties that pay commissions to apartment locators are updated on ALN's normal update schedule, those that do not pay locator commissions are updated less frequently.
Property Closed	Demolished, bankrupt, etc. Include temporary lease-downs and closings, but identified to be torn down
Refuse to Update	Verbally asked us not to call; however, we will try other methods to update
Conventional	Properties that are not student, senior or income restricted
Senior Living	Senior Independent Living– Age-restricted properties. Generally, these properties require residents to be above 55 years old, or 62+ years old
Assisted Living	Properties that are age-restricted and provide generalized or specialized medical care or monitoring of residents
Student Housing	Properties that rent by the bed, rather than by unit. These properties are open to the public per current Fair Housing laws, but mostly target students for their residents
Affordable	These are properties with an income cap for prospective residents to be eligible to lease
Low Income Affordable	Property is subsidized and the tenant pays a portion of their income as rent
Military Housing	Housing for military related personnel only. Generally located on military bases and privately developed

Compass Home Page

These are the main search areas

favorites

Favorites	Contacts	Properties	Management Companies	New Construction	Owners
Find all the Properties and Management Companies you've added to your	Search by name, company name, and job categories	Find one or multiple properties with filters or by geography	Search management companies by name, portfolio size, etc.	View, sort and filter through new construction projects across the country	Review aggregated information on ownership entities

Optimized To Be Where You Are

Take your Compass everywhere you go

*Make sure that you have Location Settings set to "On" for your device's internet browser (settings vary from device to device) so that ALN's mapping features work with your device.

iPad or iPhone

Launch Safari app. *Please note that this does not work from the "Chrome" app.

Log into your Compass account from https://my.alndata.com/

Tap the icon featuring a right-pointing arrow coming out of a box along the top of the Safari window to open a drop-down menu.

Tap Add to Home Screen. The "Add to Home" dialog box will appear, with the icon that will be used for this website on the left side of the dialog box.

Enter the name for the shortcut using the on-screen keyboard and tap Add. Safari will close automatically, and you will be taken to where the icon is located on your iPad's desktop.

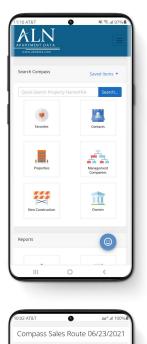
Android

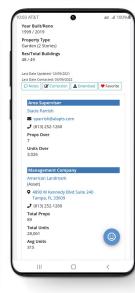
Launch the Chrome app. *Please note that this does not work from the device's native web browser app.

Log into your Compass account from https://my.alndata.com/

Tap the menu icon (3 dots in upper right-hand corner) and tap Add to Home Screen.

You'll be able to enter a name for the shortcut and then Chrome will add it to your home screen.





otal Compass Listin

Confirmed L

200 Construction

20,812,349

05

Compass Home Page

These are the main report areas



New Construction Summary





A log of management gains and losses of properties over the past 60 days, management offices with no more properties associated with them, and new management companies (or offices) with properties associated with them Choosing a market from the Summary list will open a two-page PDF summary of that market's pipeline, updated on the first of each month Choosing a market from the Market Conditions list will open an enhanced version of the Market Review PDF report available on our website

Choosing an MSA from the list will open a PDF report updated at the beginning of each quarter, detailing multifamily and economic data for the previous quarter



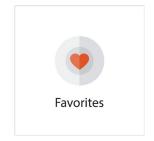
View changes to all Managers, Area Supervisors, Management Companies, and Property Names from the past day, 7, 14, or 30 days

Searching Tips Finding contacts, properties, management companies, and more



www.alndata.com

Call 1-800-643-6416 and dial extension 3 for sales or email Success@alndata.com



Find all the Properties and Management Companies you've added to your favorites

Favorite Properties

- You can add Properties and Management Companies to Favorites by selecting the heart icon in either the search results or on the individual record
- Choosing Favorites from the home page will show you a tabled list of all your favorite properties and/or management companies
- You can sort and filter all your favorites
- If you have not added anything to your favorites, this icon does not show on your home page

		Property †	Address Y	Year Built T	Occupancy #	# Units Management Co
٠	1201	<u>1201 Park</u>	1201 E Park Blvd Plano, TX 75074-5335	1997	93	368 <u>Cortland</u>
•		23Hundred @ Ridgeview	2300 Kathryn Ln Plano, TX 75025-5214	1999	94.4	480 <u>American Landmark</u>
•		Acqua at Legacy Village	5760 Daniel Rd Plano, TX 75024-4224	2007	N/A	64 <u>UDR</u>



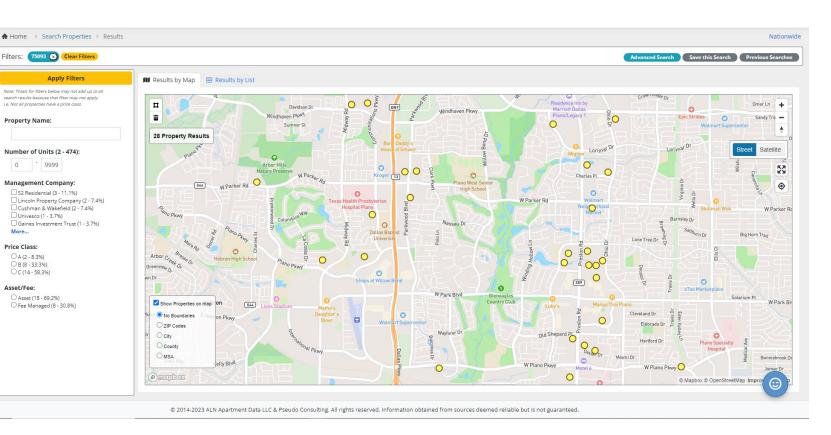
Search by name, company name, and job categories

- Try searching with less. For example, for the company name search for Lincoln instead of Lincoln Property Company
- Search for a person by last name if their first name can be spelled multiple ways
- Mix and Match! Search a company name and a job category to shorten your search
- Choose just a job category to see all contacts in that Market who work in that capacity
- There are some email addresses notated with a red exclamation point (!). These addresses may work fine on a one-byone basis but bounce when used in a bulk email. There may be any number of additional reasons that those email addresses bounced
- If you click on an individual contact, then you'll see their contact page. On this page you'll see two icons to the right of their general contact info. Clicking the download icon will download their V-Card, which you can then save to your email provider contact list.
- We don't rely on our clients to update our data, but sometimes you know something before we do! On every contact record you'll find an edit icon. Clicking on this icon opens a dialogue box so you can submit a change for our review. Changes are only made when the information is verified, so we ask that you allow up to 48 business hours for us to research the information



Property Results (Results by Map)

- The left side of the screen will show all available filters you can add to the map (and results).
- When you've added a filter, click the yellow "Apply Filters" button at the top of the left column.
- You can remove filters across the top left of the screen
- To the bottom left of the map is a white box that will allow you to choose to see boundaries on the map, such as ZIP Codes, City, and more
- The top left of the map will display the number of properties from your initial search and subsequent filters
- Dots on the map will "cluster" together at certain heights to allow for a cleaner map view. Clicking on a cluster will zoom into that cluster of properties
- The top right of the screen is where you'll have the option to go back to the Advanced Search, Save this Search, and recall Previous Searches





Property Results (Results by List)

- Add any property from your results to your Favorites by clicking the outlined heart
- Clicking on Gather Management will take you to a new table showing the unique Management Companies that own/manage the properties in your results.
- Export your results into Excel or KML file (must have export permissions)
- Click any column header to sort by that category, or drag one to group the results (will not export into groups)
- Yellow highlighted properties are not tracked (less than 50 units, mobile homes, etc.)
- Peach highlighted properties are currently being researched or refuse to update

ig a c	olumn head	der and drop it here to group by that column										
	1 >	► 50 ▼ items per page										1 - 28 of 28 items
	ALN Id	Property 1	City	State	ZIP	Market	Built	# Units	Management Company	Class	Asset/Fee	Occupancy
2	239556	AMLI West Plano	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	2015	264	AMLI Residential	Α	Asset	95.8
2	137585	Bentley Place at Willow Bend	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	1996	368	Gaines Investment Trust	С	Asset	97.8
2	137590	Carrington Park	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	1996	364	Cushman & Wakefield	С	Asset	90.6
>	137288	Colonnade at Willow Bend	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	1994	338	Lincoln Property Company	В	Fee Managed	95.8
>	137881	Cortland Arbor Hills	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	2000	330	Cortland	В	Asset	95
>	135879	Cottages at Tulane	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	1991	268	Palladium Management	С	Asset	100
>	135653	Dayton	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	1986	389	S2 Residential	С	Asset	N/A
2	137642	Ellington	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	1996	266	S2 Residential	С	Asset	81.1
>	275814	Evoke	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	2017	459	CAF Management	Α	Fee Managed	94
>	135640	Hathaway at Willow Bend	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	1985	229	S2 Residential	С	Asset	89
>	137974	Heritage at Lakeside	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	2001	181	Two Coast Living	С	Asset	100
>	137764	<u>La Ventura</u>	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	1998	324	Lincoln Property Company	С	Fee Managed	97.2
>	136318	Lakeshore at Preston	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	1993	302	Waterton	В	Fee Managed	93.3
>	137794	Livingston	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	1999	180	Grand Peaks Property Management	В	Asset	96.5
>	135870	MAA Highwood	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	1984	196	MAA	С	Asset	N/A
>	375390	Mariposa Apartment Homes at Plano Parkway	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	2026	200				0.01
>	216540	Marquis at Preston Park	Plano	ТΧ	75093	TX - Dallas/Ft. Worth	1994	2	<u>Independent</u>			N/A
,	135884	Old Shepard Place	Plano	тх	75093	TX - Dallas/Ft. Worth	1989	244	Cushman & Wakefield	В	Fee Managed	88.1



Advanced Search

- Try Searching with less. For example, search for Gramercy instead of Gramercy Oaks
- Narrow down your search by defining the Year Built or Number of Units range to the right of the search page
- If you opt to save a search, you can recall (and delete) that search the next time you come to the property search page or by choosing Saved Search on the home page
- You can create a note on any Property record

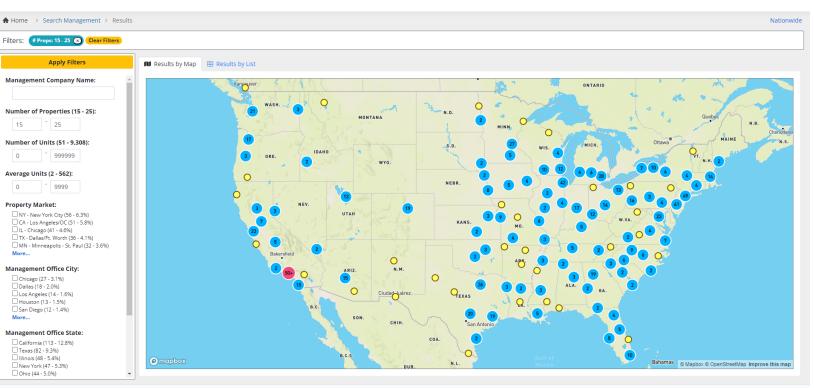
9,999 9,999 2024 2024	(or Renovated)
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- The blue info icon found next to ALN Price Class and Property Types will take you to the "methodology" page on our website for more information on the property segment definitions
- You can expand the Property Type and the Amenities area. In Amenities you can check off one or multiple for your search. However, if you choose more than one amenity, it will only search for properties that have **all** the checked amenities.
- Choosing "All Properties" in the expanded Property Type area includes those property types in your results, "Only" limits to those types, or you can completely exclude property types in your search
- Towards the bottom of the search page is the option to include research listings in your results, this may include duplicates and some listings that are not apartment communities. These listings are excluded by default
- Be aware of the time stamp of last update noted on reports. 1/1/1970 represents a property found and newly entered into our database by research



Management Results (Results by Map)

- The left side of the screen will show all available filters you can add to the map (and results).
- When you've added a filter, click the yellow "Apply Filters" button at the top of the left column.
- You can remove filters across the top left of the screen
- Dots on the map will "cluster" together at certain heights to allow for a cleaner map view. Clicking on a cluster will zoom into that cluster of properties



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Management Results (Results by List)

- Management Companies can be searched based on several different criteria. This includes company name, company address, city, state, and zip, number of properties and units, and the average number of units
- You can further filter and sort on the results page
- Choosing Gather Properties will take you to a new table listing all properties belonging to the Management Companies in your table
- Choosing Gather Contacts will take you to a new table listing all properties belonging to the Management Companies in your table

Props: 15-25 🗙 Clear Filters											
Apply Filters	🚺 Resu	lts by Map	🖽 Results by List								
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mber of Properties (15 - 25):	к	1 2	Select Categories/Markets		_				-	×	1 - 50 of 886 items
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- 9999		143103	Area Supervisor/Regiona	al Manager	AK - Ou	tlying				251	
erty Market:		110850	Broker		AL - Bin	mingham				247	
NY - New York City (56 - 6.3%)		113711	Compliance		AL - Hu	ntsville				220	
CA - Los Angeles/OC (51 - 5.8%) IL - Chicago (41 - 4.6%)		146145	Construction/Developm	ant	AL - Mo					218	
TX - Dallas/Ft. Worth (36 - 4.1%) MN - Minneapolis - St. Paul (32 - 3.6%)	\diamond	146950	Construction/Developin	•	AL - MO	Dire				209	
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agement Office City:	0	138648		Cuti						188	
Chicago (27 - 3.1%) Dallas (18 - 2.0%)	0	109803		45 Labor Data	D-III	14	00005	25	4,515	180	
Los Angeles (14 - 1.6%)	e e e e e e e e e e e e e e e e e e e		American Property Management Multifamily Management, Inc.	15 Lake Bellevue Drive 2866 Dauphin Street	Bellevue	WA AL	98005 36606	25 25	4,500	180	
Houston (13 - 1.5%) San Diego (12 - 1.4%)	Ø		Arcan Capital, LLC	3715 Northside Parkway Building 100		GA	30327	25	4,411	176	
re	× ×		Denizen Management	20 W Carmel Drive	Carmel	IN	46032	25	3,993	159	
gement Office State:	Ö		REM Capital Management	835 129th St NE	Bradenton	FL	34212	25	3,960	158	
California (113 - 12.8%) Texas (82 - 9.3%)	Ö		Reliant Property Management	5140 Business Center Dr	Fairfield	CA	94534	25	3,911	156	
lexas (82 - 9.3%) Ilinois (48 - 5.4%) Vew York (47 - 5.3%)	Ø		NXT Property Management	1018 W Atherton Dr	Salt Lake City	UT	84123	25	3,846	153	



Search management companies by name, portfolio size, etc.

- When you choose a Management Company to view, a Property name or Contact is a link to their property page or contact page respectively
- Clicking the corrections button opens a dialogue box so you can submit a change for our review. Changes are made when the information is verified, so we ask that you allow up to 48 business hours for us to research the information

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es	Contacts	Organization Chart Offi	ice and Properti	es Map Pr	operties	Lost or Gai	ined										
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icc. i		will cystall com		ffective Rent:				Class C: 721 - 27.3%			No Progra		2 - 0.1%				
								Class D: 183 - 6.9%			OneSite:		726 - 27				
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- Clicking on the company name in any level of the organization chart will "filter" the information provided on the Property and Office Map, Contacts, and Properties sections to show only relevant data to the area/level that you clicked on
- The Management Company page is now tabbed to make it easier to navigate. The sections are Properties, Contacts, Organization Chart, Office and Properties Map, and Properties Lost or Gained. A tab will not be visible if there is no relevant information to view. For example, if the management company has not had any gains or losses in its portfolio in the previous 90 days, the Properties Lost or Gained tab will not be visible.

General Tips From exporting to alerting us about changes in data, these tips are sure to help



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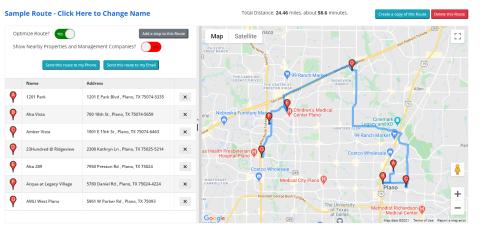
Call 1-800-643-6416 and dial extension 3 for sales or email Success@alndata.com

Sales Routing

- From any properties search results, you can choose multiple properties to add them to a sales route.
- To select properties from the table that are not adjacent to each other, hold your Ctrl key on your keyboard and left click on each property you want
- Once you've selected the properties you want, click the Sales Routing button from the top of the table



- By default, the route is optimized for the fastest route. You can rearrange the route by changing the Optimize Route to "No" and dragging the stops up or down
- You can have the map show nearby Management Company offices, which can then be added to the route
- You can add any property, management company, or any address you want by clicking the Add a Stop to This Route button
- The total distance and time is listed above the map, as is the option to create a copy of the route and delete the route
- You can send the route to your cell phone or have it emailed when you're done
- Saved Sales Routes can easily be accessed from the home page, at the top right of the Search area





General Tips & Tricks

- See any information you believe needs to be updated? Throughout Compass there is a Corrections icon that, when clicked, will open a pop-up form to fill out any changes you see need to be made. Any information you may provide will be researched and changes will be updated as necessary
- Excel exports can provide additional information than what is in the results. For example, any property search results will have general information shown, but when exported into Excel will have a more detailed look at each property in the export
- Across the top of Compass are several helpful links, including your Account Manager and Salesperson's email address, a link to Tech Support, and a button for you to send us your suggestions for the program. There's also a link to register for our referral program!
- You can export property results into a KML file, a file format used to display geographic data in an Earth browser such as Google Earth
- Saved Searches and Sales Routes can be found on the home screen, along with the Quick Property Search field

Exporting to Excel & Email Marketing

Exporting to Excel

- Perform your search based on your criteria in Contacts, Properties, Management Companies, or Owners
- You must choose which records from your results you wish to export. To choose all of them at once click the empty checkbox located above your first result in the table header area
- Click the Export to Excel button at the top of your results
- Import your Excel list into any email marketing service in a CSV format
- There are some email addresses that work fine on a one-byone basis but bounced when they were used in a bulk email by ALN. They are notated with a red exclamation point (!), but there may be any number of additional reasons that those email addresses bounced

Email Marketing – What You Should Know

- Always comply with Spam Laws, including (but not limited to) providing an Unsubscribe link for the recipients of your email marketing. For additional information please visit <u>https://www.ftc.gov/business-</u> guidance/resources/can-spam-act-compliance-guide-business
- When you send bulk emails you may get bounces from your email list.
 Some company's ISP (Internet Service Providers) block messages that it considers to be spam based on many different criteria, including detecting a bulk email message, "spam words," and "spam phrases"
- ALN *highly* recommends you utilize any Bulk Email provider (SendGrid, SalesForce, Mail Chimp, etc.) or CRM (SalesForce, Dynamics 365, HubSpot, etc.) capable of sending large quantities of emails
- Learn the FTC's compliance guide to the CAN-SPAM Act for businesses to ensure you're not in violation of any laws as they pertain to your email marketing.
- More information can be found on the FTC website here: <u>https://www.ftc.gov/legal-library/browse/rules/can-spam-rule</u>
- The link to the text of the rule can be found here: <u>https://www.ecfr.gov/current/title-16/chapter-l/subchapter-C/part-316</u>

Do you have a tip or a trick you use that you didn't find in this document?

Tell us about it!

Call 1-800-643-6416 and dial ext. 3 for sales or Email <u>Success@alndata.com</u>



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