Where Real Estate & Technology Converge

QUICK REFERENCE GUIDE

AccelerAgent™ Websites

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Table of Contents

Table of Contents **2**
Toolkit Overview **7**
Toolkit Login **9**
To login into the Toolkit from your website: 9
To login into the Toolkit from www.propertyminder.com 9
Personal Profile **10**
What can I do with Personal Profile? 10
How can I change My Password? 10
Can I customize my contact or company information? 10
How can I add my Social Media Links? 11
How can I update or add to my Area of Operations? 11
Website Editor **12**
What can I do with the Website Editor? 12
How can I add or change my photo? 12
How can I change the design, style or the color scheme of my website? 12
What is HomeScape theme? 12
How can I create and edit the "About Me" page? 13
How can I add custom pages to my website? 13
What can I do with the Custom Files Manager? 14
How can I add a link to a file saved on my local computer? 14
How can I add a custom link on my website? 15
How can I customize the Auto Lead Capture window? 17
My Lead Auto Capture box is not appearing anymore, what happened? 17
How can I modify the welcome message that is sent out to all captured visitors? 18
What are website Meta Tags? 18
How can I change my website Meta Tags? 18
How do I modify my slogan? 18
I have made changes to my website, but do not see them. Why? 19
My Account **20**
What can I do with My Account section? 20
How can I add or change my credit card? 20
Can I create emails associated with my site? 20
Can I forward my emails from the website to another mailbox? 20
Preferences **21**
How can I edit my system preferences? 21
Required Fields on Lead Capture Forms 21
Listing Page Preferences 21
Ignored Searches Preferences 22
Comparable Properties Preferences 22
What is SmartZip score and how does it help me capture more leads? 22
Registration after X Amount of Property Views 23
Map Based Find a Home Preferences 23

Website Statistics **24**
How do I know how many people visited my site and what they looked for? 24
Why should I make the website statistics page the default page on my browser? 25
How can I make the website statistics page the default page on my browser? 25
Hits Tracking **26**
What metrics do I need to track to be successful in the Internet era? 26
How can I find the report on my website traffic? 26
How can I view reports about Search Engine and other Referrers? 27
Resources **28**
What documents can I find in the Resource Center? 28
Product Training Videos **29**
What are the topics covered under the Training Videos? 29
Client Relationship Management **30**
What can I do with the Client Relationship Management? 30
What are the CRM quick-links on the toolkit? 30
How can I find visitor information captured by my website? 31
How can I add new contacts to the Contact Manager? 31
How do I delete a single Contact? 31
How can I create new groups? 32
How can I build my network group? 32
How can I send a message to an entire group? 32
How do I remove a contact from a group without deleting the contact record? 35
How can I email MLS listing(s) to specific contacts? 37
How does the Follow-up Campaign tool help me with relationship marketing? 38
What makes up a campaign and how can I create a new campaign? 38
How can I edit/activate a campaign for all my contacts? 40
How can I change the scheduled delivery date for the campaign? 40
How can I choose a different e-Card (design template) for the campaign? 40
What is the Message Library and where can I view it? 42
How can I edit an existing message in the Message Library? 42
How can I export contacts to Outlook or other CRM? 43
Where can I find the details of my website visitor's requests? 43
What is the purpose of the unsubscribe group? 43
How does "unsubscribe" work? 43
How can I handle an unsubscribe request emailed to me? 43
How do I disable the New Listings Found and Price Change Notices? 44
How can I send message with attachment from CRM? 45
What does "Bounced Email List" mean? 45
MLS Searches **46**
What can I do with MLS Searches? 46

How can I set up a new search? 46
How can I auto activate searches requested on my website? 47
How can I verify the email address of a client who has requested a search on my website? 47
How can I update the settings for the auto activate search? 47
How can I exclude listing types from public MLS searches on website? ... 48
How can I see my clients' favorite listings? 48
How can I automatically monitor and clean up my ignored searches? 48
How can I "turn off" the auto clean up of ignored searches? 49
How can I prevent searches from being categorized as ignored searches? 49
How can I track my client's search activity? 49
How can I analyze my clients search activity? 51
What is Mobile Alert? 51
How can I customize the message that the system emails to my customers? 52
How should I use search scheduling? 52
How can I edit the search? 52
How can I find new leads and MLS search requests? 53
How can I receive daily client activity reports? 53
What does "deactivate search" mean? 53
What can I do with the Buyer Match tool? 54
What is the Property Minder Agent Alliance? 54
How do I setup Buyer Match or Reverse Search? 55
Will my clients contact information be provided to other agents? 57
How can I find potential buyers for a new listing? 57
What are custom IDX searches? 58
How do I create custom IDX searches? 59
Can I edit the results of custom IDX searches? 59
Where and how do I use custom IDX searches? 59
My custom IDX link is not working. 61
How can I change Email Notification settings for MLS Searches? 61
Listings by Email 62
What is Listings by Email? 62
How can I send a listing or multiple listings by email? 62
What is the difference between "agent view" and "client view"? 62
Open Homes 63
How can I show Open Homes? 63
How can I activate Open Homes on my website? 63
Virtual Tours 65
What can I do with Virtual Tours? 65
What do I need before I can create a Virtual Tour? 65
How can I start a new Virtual Tour? 65
How can I design slides in a new Virtual Tour? 66
How can I edit a Virtual Tour draft? 67
How can I publish the Virtual Tour? 67
How can I add the Virtual Tour to my website? 67

What is the difference between a Draft and a Published Tour? 68
What is the difference between a full preview and a restricted preview? . 68
What is the charge to publish a tour? 68
Where can I advertise the published tour? 68
Comparable Market Analysis.....69
What is the purpose of CMA (Comparable Market Analysis) tool? 69
How can I create Home Evaluation Report for my client? 69
Inventory Manager 70
What can I do with Inventory Manager? 70
How can I add a Listing/Property manually to the website? 70
How can I load the Listing from MLS? 71
How do I block other PropertyMinder users from listing my properties? .. 71
How can I update a Listing extracted from the MLS? 71
How can I remove a listing from the Inventory Manager? 72
How can I prepare a Listing/Property photo for the web? 72
How can I create a photo album (add multiple pictures)? 73
How can I change the order of my Featured Listings? 73
How do I post my listings to Craiglist? 73
How can I create different lists of properties? 74
What is a disclosure package? 76
How can I add disclosure documents to the listing? 76
How can I grant document access to my client without checking my email notification? 77
How can I deny access to these documents without checking my email notification? 77
How can I see who downloaded my disclosure documents? 77
Transaction Progress Report.....78
What is Transaction Progress Report? 78
How can I create a Transaction Progress Report for my clients? 78
How can I update a Transaction Progress Report? 78
How can I archive a Transaction Progress Report? 79
Where can my clients view the transaction progress report that I created for them? 79
Home Care Center 80
What can I do with Home Care Center? 80
How can I respond to my client's request? 80
How can I get requests for Home Care Advice from my website visitors? 81
Office Solution.....81
How can I edit my company information on the website? 81
What can I do with the Agent Roster? 81
How can I add new agents? 81
How can I edit, view and delete existing agent profiles on my office website? 81
How can I add a new office and create its profile on my office website? .. 82
Website SiteMap 82
Website Lead Capture Forms 83

Product Packages.....86

Toolkit Overview

When you log in to the Admin Toolkit, you will see the website customization & management tools and the nine major services represented with icons and links.

WEBSITE CUSTOMIZATION AND MANAGEMENT TOOLS

These tools are located on the left panel of your Toolkit.

Personal Profile - personal contact info, password, company info, logo, area of operations

Website Editor - your picture, slogan, website design, resume, custom pages and links, agouti lead capture tool, meta tags editor.

My Account – update your billing information, add / transfer a domain, create and forward emails

Preferences - required/optional fields on lead capture forms, listing page preferences (maps, mortgage calculator), Ignored Searches preferences.

Website Statistics - overview of activities on your website for a selected time period.

Hits Tracking - traffic (history of page views), Search Engine/Referrals (different ways visitors found your site)

Resources - forms, reports, white papers and support documents.

NINE TOOLS IN YOUR TOOLKIT

These tools are located in the center frame of your Toolkit.

Client Relationship Manager (CRM)

Manages your contacts and captured visitors. Includes address book, email marketing, auto follow-up campaigns, message library, e-cards, and import/export contacts feature.

MLS Searches (MLS Access Tools)

Setup new searches and automatically activate online MLS searches, email and wireless alerts, listing price watch, client tracking and activity analyzer and buyer match for new listings.

Listings by Email

Send single and multiple listing flyers by email to a selected client or to a group of contacts.

Open Homes

Show your open houses for the coming weekend.

Virtual Tours

Create virtual tours and slide show presentations using digital photos. Build listing presentation drafts, update them, and then publish the. Post the virtual tour on the MLS, add the link on your website or email it to your clients.

Comparable Market Analysis

Create a Comparable Market Analysis Report. Send a report that gives instant home value. You can send the report via email to your prospective client or print it for a listing appointment.

Inventory Manager

Show Featured Listings, Exclusive or "Pocket" Inventory, Rentals, Homes sold, etc. You can edit listings, add pictures, include virtual tours, and hide/show the listing hit counter. Your featured and office listings are automatically loaded from the MLS.

Transaction Progress Report

Provide up-to-the-minute information on the status of transactions. Automatic timely reports to maintain client contact post transaction.

Home Care Services

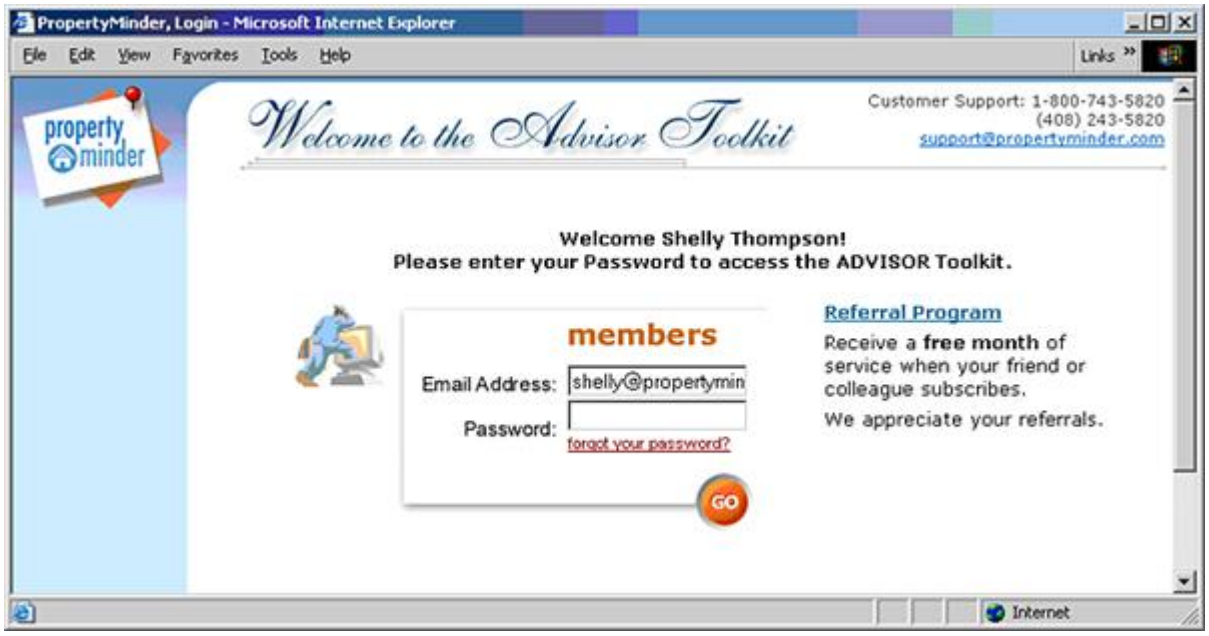
Display custom lists of Home Care Contractors/Professionals. Agents custom referral list for Inspections, Repair & Installation, Landscaping & Gardening, Cleaning, Appliance Repair, or Pool & Spa Maintenance. This list is automatically emailed to any client requesting a contractor referral from your website.

Toolkit Login

You can log in to the Toolkit from your website or sign-in at www.propertyminder.com

To login into the Toolkit from your website:

1. Open the browser (e.g. Internet Explorer) and type your domain name (http://www.yourdomainname.com) in the top Address Bar.
2. On the top panel of your website, click "Admin Toolkit".
3. On the screen that appears, type your login name and password



4. Your login name is your email address.
5. Your password is case sensitive. Make sure that the "Caps Lock" button on your keyboard is not pressed.
6. If you do not remember your password, click the "forgot your password?" link and your password will be emailed to you.

To login into the Toolkit from *www.propertyminder.com*

1. Open the browser (e.g. Internet Explorer) and type www.propertyminder.com in the Address Bar.
2. On the top right corner, click on the "**Clients Login**" link.
3. Type your login name and password.
4. Your login name is your email address.
5. Your password is case sensitive. Make sure that the "Caps Lock" button on your keyboard is not pressed.

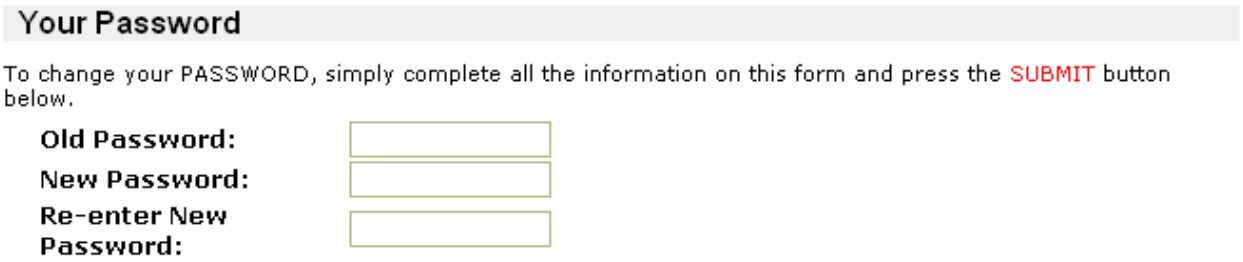
Personal Profile

What can I do with Personal Profile?

1. Change personal information.
2. Change your **Admin Toolkit** password.
3. Change your contact information.
4. Change your company information.
5. Change your company logo using the Real Estate Logo Library. Click change company logo link to do this.
6. Change/add your areas of operation to list switch utilities and community information on your website.

How can I change My Password?

1. Log in to your **Admin Toolkit**.
2. Click the **Personal Profile** button on the left panel of the toolkit screen.
3. Enter your Old Password.
4. Enter a New Password.
5. Re-enter the New Password.
6. Click the **SUBMIT** button at the bottom of the page.
7. If you do not want to keep the changes you made, click Cancel.



Can I customize my contact or company information?

- You can add customized contact information on your website (E-fax, Home Office, etc).
- You can display your title along with your name and contact information.
- You can add or modify the company logo from the logo library in the company section.

How can I add my Social Media Links?

This section allows you to add on your website links to social networks such as Facebook, Twitter, YouTube, LinkedIn, Flicker, and more. These links will appear on your home page as clickable icons. The feature is available only on the frameless website designs.

To easily add the button:

1. Log in to your Admin Toolkit.

2. Click the Personal Profile button on the left panel of the toolkit screen.

3. Go to the **"Your Social Media Links"** area and type in or paste the URL of that profile. Press **Submit** at the bottom, and the icon will appear on your website.

How can I update or add to my Area of Operations?

This section allows you to add utility information (e.g. electricity, gas, water, phone, etc.) on the "Switch Utilities" tab on your website. It also provides community information for the chosen areas (e.g., cities, transportation, newspapers, hospitals, parks, etc.) on the "Community Info" tab.

- Select the counties of operations from the list.
- Specify an order for the counties so that the ones most important to your clients are displayed at the top.

Website Editor

What can I do with the Website Editor?

The website editor page allows you to:

- Upload your own photo.
- Add/edit your slogan.
- Choose/change your website homepage design.
- Choose your banner and images from our gallery or upload your own..
- Add/edit your resume/profile ("About Me").
- Add links from your site to other websites.
- Change the order of links on your website.
- Add/edit your personal custom pages.
- Add/edit your personal lead capture pages.
- Enable, disable or customize the "Auto Lead Capture" window.
- Modify the website Meta Tags.
- Create your own list of utilities.

How can I add or change my photo?

1. Log in to the **Admin Toolkit**.
2. Click **Website Editor** on the left panel of the Toolkit screen.
3. Under the **Your Picture** section, browse for the photo in your computer and upload it. The page will give you the correct image size.

How can I change the design, style or the color scheme of my website?

You can change your website design yourself at any time.

1. Log in to the **Admin Toolkit**.
2. Click **Website Editor** on the left panel of the Toolkit screen.
3. In the **Website Design** section, click the standard designs portfolio or animated designs portfolio link to view the available color schemes. Click any color square to view the designs within that color.
4. Make note of the reference number for the design you like.
5. In the **Standard Designs** or **Animated Designs** drop down box, find and select the reference number and name of the design you like.
6. Click the **SUBMIT** button at the bottom of the page to save changes.

What is HomeScape theme?

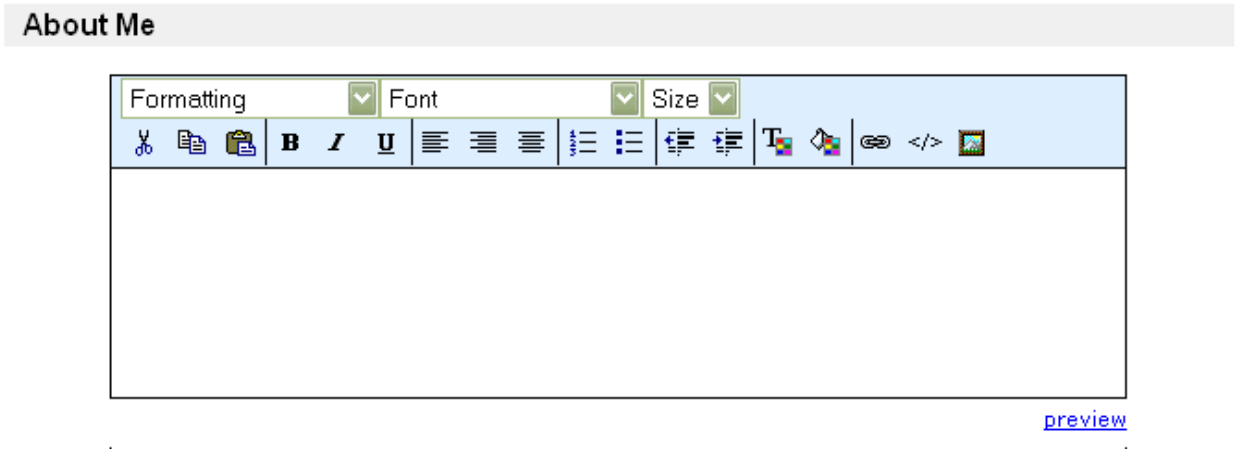
HomeScape theme is a new layout for your website. This new theme features a quick MLS search on the homepage, a top navigation menu, quick links, editable rotating photos and featured listings thumbnails on the homepage.

If you would like to take advantage of the free HomeScape theme, you need to move your website to a frameless design at first. Send an email to support@propertyminder.com to make the switch.

How can I create and edit the "About Me" page?

1. Login to the **Admin Toolkit**.
2. Click on the Website Editor link on the left side of the screen.
3. Click on the About Me icon.

The About Me feature is a professional editing tool. It allows you to add text, insert images, add links, change font colors, text sizes, background colors, links, and much more. It is fun and easy.

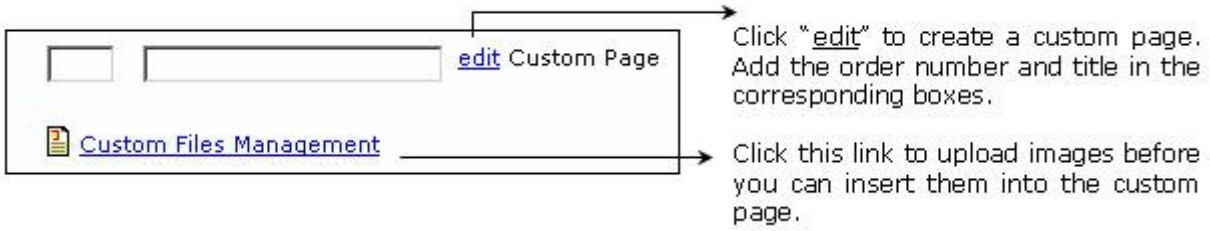


To make formatting changes to the "About Me" text in the Website Editor:

1. Select/highlight the text.
2. Click the appropriate icon (bold, italics, font size, background, color, cut and paste) from the top bar of the editor for the desired operation. When you move the pointer over the icon in the toolbar, the action associated with that icon will appear.
3. Click the **Save** button at the bottom of the page to save changes.

How can I add custom pages to my website?

You can create and add up to five Custom Pages to your website. A Custom Page is a static page that can be used as an alternative to referring customers to other websites.



To add a new custom page:

1. Specify the order/sequence of the custom page link by entering an appropriate number.

   NOTE: The order number is in increments of 10.

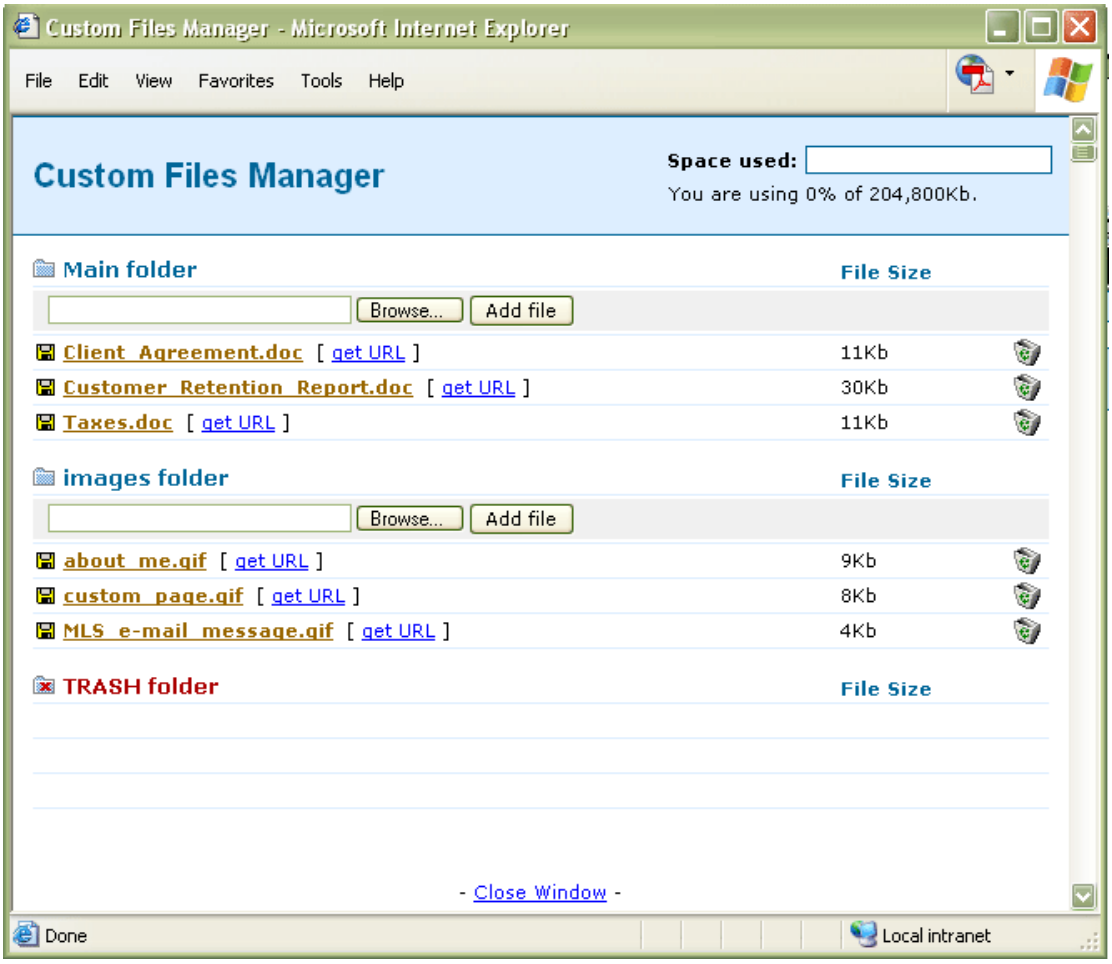
2. Type in the blank area to label the link associated with the custom page.
3. Click the edit link and create a page in the new window that appears.
4. After you create the custom page, you can Preview and Save it.
5. Click the Submit button at the bottom of the Website Editor page to save changes.

What can I do with the Custom Files Manager?

The Customs Files Manager allows you to upload, store and organize files and images before you insert them into a custom page.

To add a file to the Custom Files Management

1. Click **Website editor** on the left panel of the **Admin Toolkit** page.
2. Click on the **Buttons** icon.
3. Click the **Custom Files Management** link.
4. On the Custom Files Manager window, go to the main folder section if you are uploading a document or go to the image folder section if you are uploading a photo. Click the Browse button and choose the location of the file from your local computer.
5. After selecting the file, click **Add File** to add the file to the "Custom Files Manager".
6. To delete a file, click the trashcan icon next to the file.
7. The file is now saved on the "Custom Files Manager". You can now insert the image file into the Custom Pages, About Me, or in any messages that you would like to send out to your clients within the PropertyMinder CRM.



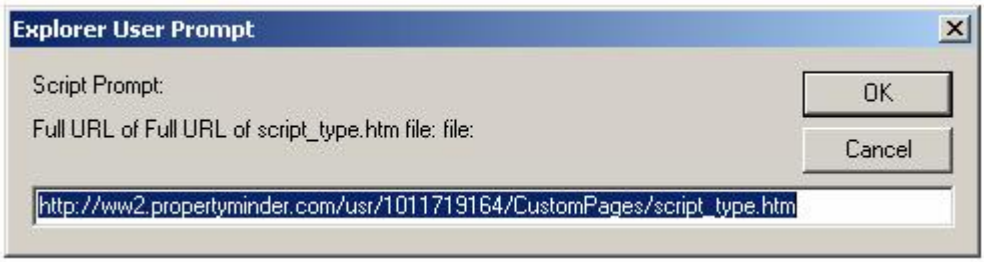
How can I add a link to a file saved on my local computer?

You can upload a non-image file to the custom file manager in the main folder and then add a link/button to the file on your website. To do this:

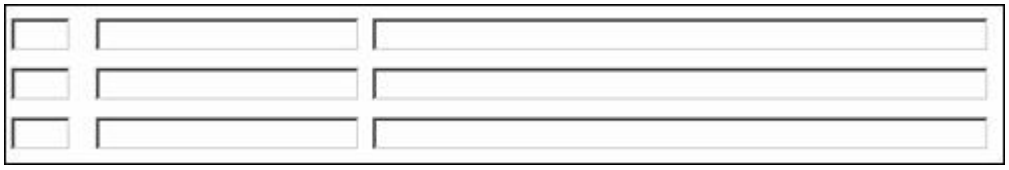
1. Click Website Editor on the left panel of the Toolkit.

2. Scroll down and click the Custom Files Management link.
3. In the window that appears, in the Main folder section, click the Browse button and choose the location of the file from your local computer.
4. After selecting the file, click Add File to add the file to the Custom Files Manager.
5. To delete a file, click the trashcan next to the file.
6. The file is now saved in "Custom Files Management". You can now click the get URL link next to the file name.

7. This will bring up a small window with a link to the saved file.



8. Copy the link from the window, scroll up to the "Your Links" section and paste the link into one of the blank fields.



9. Enter an order number and a name for the link.
10. Go to your website homepage and test the link by clicking the name of the button/link.

How can I add a custom link on my website?

You can add as many links to your website as you like. These links will be shown on your website in the order you specify (ascending order).

To add a new link:

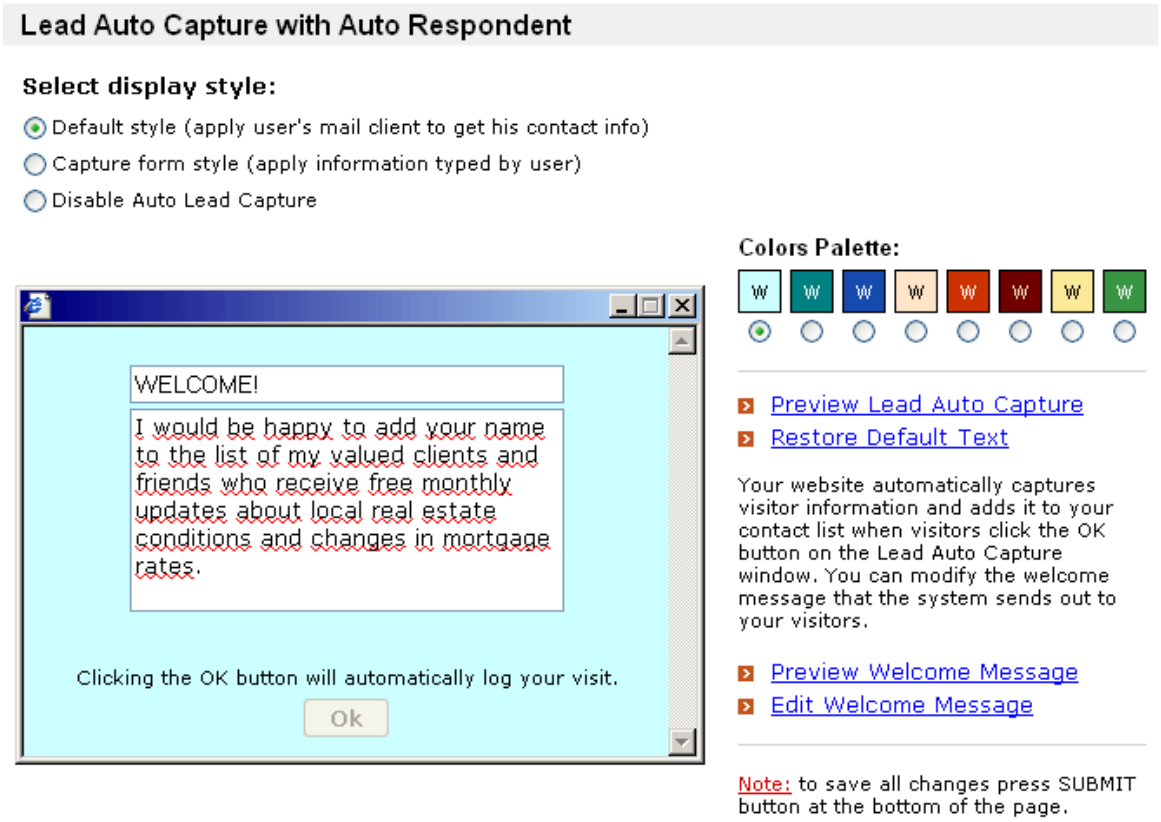
1. Specify the order by entering an appropriate number.
2. Label the button associated with the custom link.

3. Provide the URL/link (http://www.webaddress.com) of the page to be associated with the button.
4. Click the SUBMIT button at the bottom of the page to save changes.

How can I customize the Auto Lead Capture window?

The lead auto capture window has been designed as a layered screen that slides down onto your homepage when a new comes to your home page. Since the window is not a pop-up but a layer, it does not negatively impact your website with regard to search engines and PPC services like Google Adwords.

1. Click the Website Editor button on the left panel of the Toolkit screen.
2. Scroll down to the section "Lead Auto Capture with Auto Respondents" .



3. To change the background color of the window, choose a "Palette" color on the right.
4. To edit the text message, click in the white message area.
5. To see a preview of the customized Auto Lead Capture window, click Preview Lead Auto Capture on the right side.
6. Depending on weather you are using PPC advertising or not, you can choose the display options of this auto lead capture for different browsers. Here are the available options:

   • Default style (apply user's mail client to get his contact info)
   • Capture form style (apply information typed by user)
   • Disable Auto Lead Capture

7. To save and update changes, click Submit at the bottom of the page.

My Lead Auto Capture box is not appearing anymore, what happened?

The Auto Lead capture tool uses cookies. When a client goes to the site the first time and clicks on the Auto Lead capture box, the site will place a cookie on their computer to note that they have logged in before. To re-enable the drop down box, the user will need to delete the cookies from the Internet Explorer cache.

How can I modify the welcome message that is sent out to all captured visitors?

1. Click the Edit Welcome Message link.

2. Update the message and add hyperlinks, images or change the formatting of the message.
3. After modifying the Welcome Message, you can Preview and Save the message.

What are website Meta Tags?

A Meta Tag describes some aspects of the contents of a web page. The information that you provide in a Meta Tag is used by search engines to index a page so that someone searching on the Internet for content contained in your website will be able to find it. The Meta Tag is placed near the top of the HTML in a Web page as part of the heading.

- All your most important key phrases should be in the TITLE tag. Look at your key phrases, make a list of all the important words, and create a title tag that uses them. Also, keep in mind that browsers only display the first few words of a title tag. The first sentence of your title tag should be easy to read and understand.
- The Keywords Meta Tag lists the words or phrases that best describe the contents of the web page.
- The Description Meta Tag includes a brief (one or two sentences) description of the page.

NOTE: The title, keyword and description tag are used by search engines to index your website page and assign a position based on their relevancy to the search query (keyword).

How can I change my website Meta Tags?

Agents, who are comfortable manipulating keywords, site titles, and Meta Tags, can make these changes through the Meta Tag editor. Typically, the document which contains the most keywords searched and relevant to the website content is classified by the search engine as the most popular and will be selected as the "best match".

To change your website Meta Tags:

1. Click **Website Editor** on the left panel of the **Admin Toolkit**.
2. Scroll down to the section on **Meta Tags for your website**.
3. Add or update the words in the Title, Description and Keyword fields.

How do I modify my slogan?

1. Click **Website Editor** on the left panel of the **Admin Toolkit** screen.
2. Scroll down to **Your Slogan** section.
3. Type in your text.
4. Click **Save**.

I have made changes to my website, but do not see them. Why?

While you surfing the web your internet browser remembers content of pages you visit. Images, sounds, texts are stored in Temporary Internet Files folder on your computer. Storing these files makes browsing the Internet faster because it takes your computer less time to display Web page when it can call up some of the page's elements or even the entire page from your local Temporary Internet Files folder. That is why it can be a reason of why you do not see changes you made to your website recently.

Clearing your cache is easy, and something you should make a regular habit. Below are instructions for clearing the cache of the most common types of web browsers. After you've completed the steps to clear your cache, please close all open browser windows, and reopen your browser.

Internet Explorer 7 and 6

1. From the 'Tools' menu, choose 'Internet Options'. (The 'Internet Options' dialog box should appear).
2. If the 'General' tab is not already in front, click it.
3. Click the 'Delete Files' button. (The 'Delete Files' dialog box should appear).
4. Check the box labeled 'Delete all offline content'.
5. Click 'OK', then click 'OK' again.

Internet Explorer 5

1. From the 'Tools' menu, choose 'Internet Options'. (The 'Internet Options' dialog box should appear).
2. If the 'General' tab is not already in front, click it.
3. Click the 'Delete Files' button. (The 'Delete Files' dialog box should appear).
4. Check the box labeled 'Delete all offline content'.
5. Click 'OK', then click 'OK' again.

Internet Explorer 4

1. From the 'View' menu, choose 'Internet Options'. (The 'Internet Options' dialog box should appear).
2. If the 'General' tab is not already in front, click it.
3. Check the box labeled 'Delete all offline content'.
4. Click the 'Delete Files' button. (The 'Delete Files' dialog box should appear).
5. Click 'OK', then click 'OK' again.

Netscape 8

1. From the 'Tools' menu, choose 'Options'. (A dialog box should appear).
2. Click on 'Privacy'.
3. Click the plus sign next to 'Cache' to open the menu.
4. Click 'Clear' to delete the temporary Internet files.

Mozilla Firefox

1. From the 'Tools' menus, choose 'Options'. (The Options window will appear).
2. Click the 'Privacy' tab. (The Privacy tab has a padlock icon).
3. In the Privacy window, click the 'Cache' tab.
4. Click 'Clear Cache Now'. (The button will become grey temporarily. Once it is clickable again, the browser cache will be clear).
5. Click 'OK' to return to your browser window.

My Account

What can I do with My Account section?

My Account section allows you to:

- Add/change you billing information
- Add/change domain names
- Add, change or forward email boxes

How can I add or change my credit card?

1. Login to you **Admin Toolkit.**
2. Click **My Account** button on the left navigation panel.
3. Go to Billing Information section.
4. Fill in required fields and click **Submit** button.

If you have any questions concerning your billing information please forward them to accounting@propertyminder.com.

Can I create emails associated with my site?

Yes, you may. You can have 2 mailboxes at one time for free and $5/month for additional emails. The size of each mailbox is 50 MB.

To make an email with your domain name, go to **My Account** section within the **Admin Toolkit** left navigation.

1. Refer to **Your Domains** field and click **Add email support** link.
2. In **Email Information section** click **Add New Mail Box** and fill in your mailbox name and password fields.

Can I forward my emails from the website to another mailbox?

To forward your email messages from the website to another mailbox:

1. Go to My account section of your **Admin Toolkit**.
2. In section **Forward Email From** click **Add New Forward**.
3. Fill in the required fields and click **OK**.

WARNING: All emails will be **MOVED** to the new email address and **NOT COPIED**.

Preferences

How can I edit my system preferences?

Use the **Preferences** link on the left side of your Toolkit to adjust required fields on lead capture forms, listing pages and ignored searches.

Required Fields on Lead Capture Forms

Check your preference to indicate the additional information you would like the website visitor to provide on request forms like home search, CMA and report library. You can choose to make the **Phone Number** and/or **First Name** a required field on lead capturing forms like MLS search, CMA and reports.

1. Phone number is required
2. First name is required

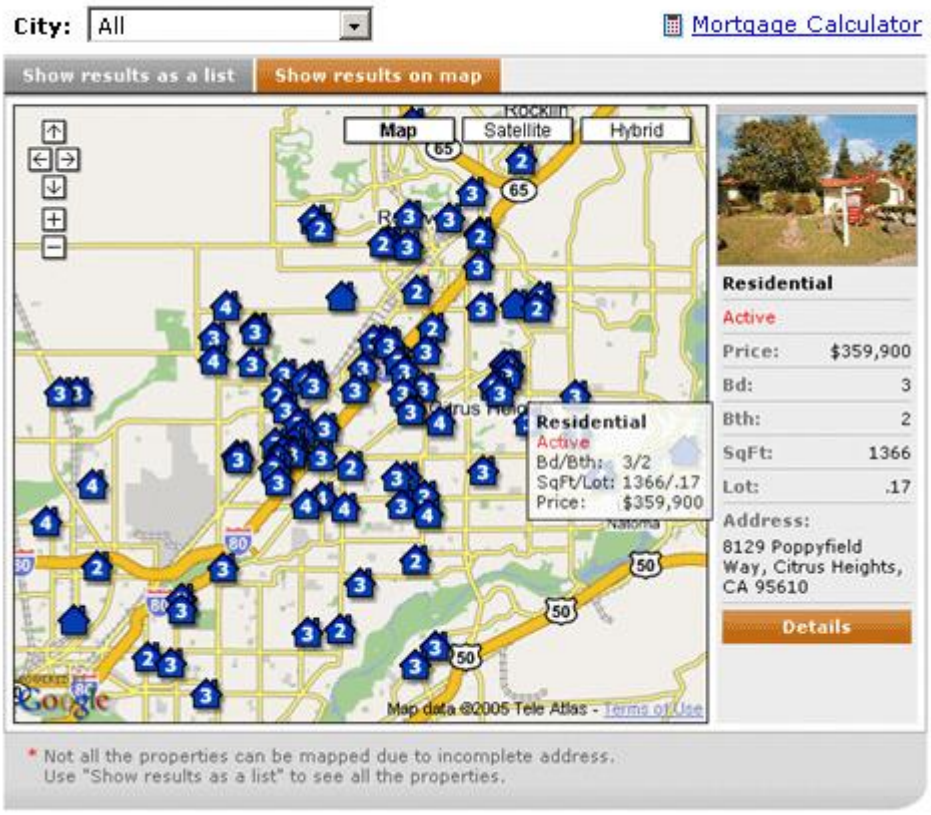
NOTE: Requiring the phone number may discourage visitors from completing the request form and providing their email. This may reduce the number of lead captures on your website. On the other hand, if the visitor offers you this information, you have a better chance at following up with them.

Listing Page Preferences

Control the selection of associated tools on all pages that show listing information.

- **Choose between maps supplied by MapQuest, or personalized and branded Google™ maps.**

  1. Google™ maps, branded with your picture and contact information. Includes aerial, topographical and environmental map options.



Provide your clients the convenience of a bird's-eye view of the listings on a map. A mouse-over on the house icons displays quick summary for each listing plotted on the map. Just click the house icon on the map to view a summary of the property details. Clients can change the view for featured and office listings by choosing "show results as a list" or "show results on map". From the Toolkit (Preferences tool), you can set the default view for the listings to list or map.

2. MapQuest maps

- **Include the Mortgage Calculator tool on pages with listing information.**

  The Mortgage Calculator allows your clients to automatically estimate monthly payments for the listed property, by changing the down payment, interest and loan amount to determine the most optimal payment option.

Ignored Searches Preferences

Enable or disable the auto deletion of ignored searches.

- Auto clean up Ignored searches

Comparable Properties Preferences

Check your preferences to enable/disable comparable properties searches and specify the default search options.

If you check "Allow comparable properties search", your website visitors will be able to access the list of comparable properties from any listing's details page. Comparable properties are the listings that have similar price, footage and lot size, number of bathrooms and bedrooms to the subject property. They are listed in descending order of geographical proximity.

Some options to customize the comparable properties feature:

- You can indicate the number of times a user can view comparables for free before asking them to register.
- Set the default search area for comparable searches. This includes searching by the same MLS, the same city and so on.
- Specify if properties with Sold or Pending status should be included in the comparable search results.
- You can specify the variation in price, footage and lot size from the subject property.
- Enter the maximum number of listings in the search result list.
- You can set the restrictions on property age (in years) and listings' age (in days).

What is SmartZip score and how does it help me capture more leads?

SmartZip has an index of over 70 million + homes in their database where each home has been rated based on ownership or investment score.

When a visitor views a listing with the SmartZip score on the property details window, he has two choices:

- Request that the Realtor® provides the SmartZip analytic report for this property
- Buy the report online direct from SmartZip

The report adds another lead capture opportunity on your AccelerAgent™ website, since both choices will require the visitor to enter his information before getting the report. Here is a sample of a SmartZip Report (sample)

To allow your website visitors to see SmartZip scores on listings details pages:

1. Login to your **Admin Toolkit**.
2. Click on the **Preferences** on the left navigation bar.

3. Within the **Listing Page Preferences** section, check "**Show SmartZip Score on the listing details pages.**"
4. You can type the minimum SmartZip score to show. Properties below this score will not have SmartZip rating on listings details.

On agent websites that have SmartZip subscription, there will only be the choice to fill out a name & email address. The Realtor® will be able to send the report to that visitor. For agent's without a SmartZip subscription, the visitor can either request the report from the agent or be redirected to SmartZip to buy the report.

Please contact our support department support@propertyminder.com or call (800)743-5820 to order SmartZip subscription.

SmartZip Price (unlimited reports):

- $39.95 SmartZip Pro Monthly Subscription
- $295.00 SmartZip Pro Annual Subscription (save over 38%!)

Registration after X Amount of Property Views

The main gist of this feature is that for visitors who are viewing either MLS search results or custom IDX pages, they are forced to register after let's say 3 property detail views. After registering, the visitor will then be a captured visitor you can then track every property listing that the visitors has clicked on.

Within the Listing Page Preferences section, find the option that says "**Specify here how many listing details pages guest user can view without registering.**" You can select Unlimited listings, 0, 1, 3, and so on. Don't forget to click on the **Submit** button on the bottom of the page.

Map Based Find a Home Preferences

This is the suite of settings to customize the Map Based Find a Home user interface.

Available options include:

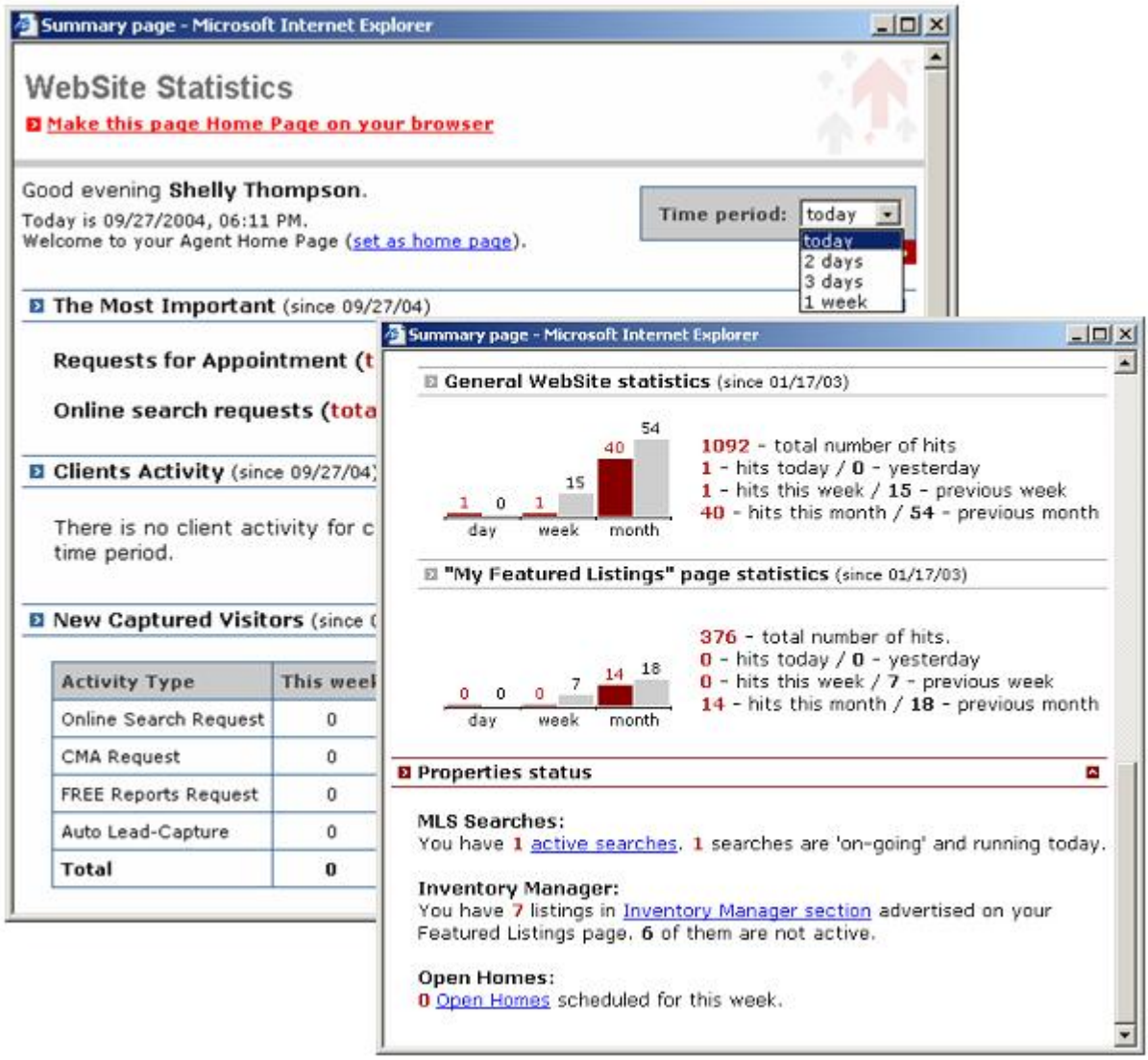
- **Default MLS** (this is useful if you have multi-MLS support).
- **Default content of the map**. You can choose any combination of Featured Listings, Office Listings, Hot Lists and Custom IDX search results.
- **Details Window**. Integrate the Property Details View as an extra tab/window or layer (basically to keep the visitor on the same browser window).
- **Lead capturing options**. For visitors who are viewing map search results, they are forced to register after let's say 3 search results views. After registering, the visitor will be a captured visitor. You can disable guest searches or select Unlimited guest searches, 1, 3, and so on.
- **Default map position**. Just drag and drop the map to a preferred position.

Website Statistics

How do I know how many people visited my site and what they looked for?

Click the **Website Statistics** button located on the left panel of your Toolkit.

A new window will open on your screen.



To choose the time period for which you want to view the activity on your website: go to the **Time Period** drop down box on the top right side of the screen, choose the time period and click **Go**.

Why should I make the website statistics page the default page on my browser?

The website statistics page summarizes the activity on your website. You can choose the time period for which you want to view the activity on your website.

This page gives you a summary of your **Admin Toolkit** operations. It lists important information like:

1. Showing Appointment Requests
2. New Online Search Requests
3. Clients who have viewed the searches/listings from their personal organizer.
4. Number of New Contacts in your CRM (Client Relationship Management)
5. New Captured Visitors statistics. The table below shows a summary of all the major lead capture categories.

The Website Statistics Page Shows:

1. The number of hits for the general website and the featured listing page.
2. The total number of Active Searches and a link to the page that lists the active searches.
3. The total number of Featured Listings (pocket or exclusive) and a link to the Inventory Manager tool.
4. The total number of Open Homes scheduled for the week and a link to the Open Homes tool where you can schedule or update the open houses on your website.

How can I make the website statistics page the default page on my browser?

1. Click the **Website Statistics** button.
2. In the new window that opens, click the link **Make this page the home page on my browser**.

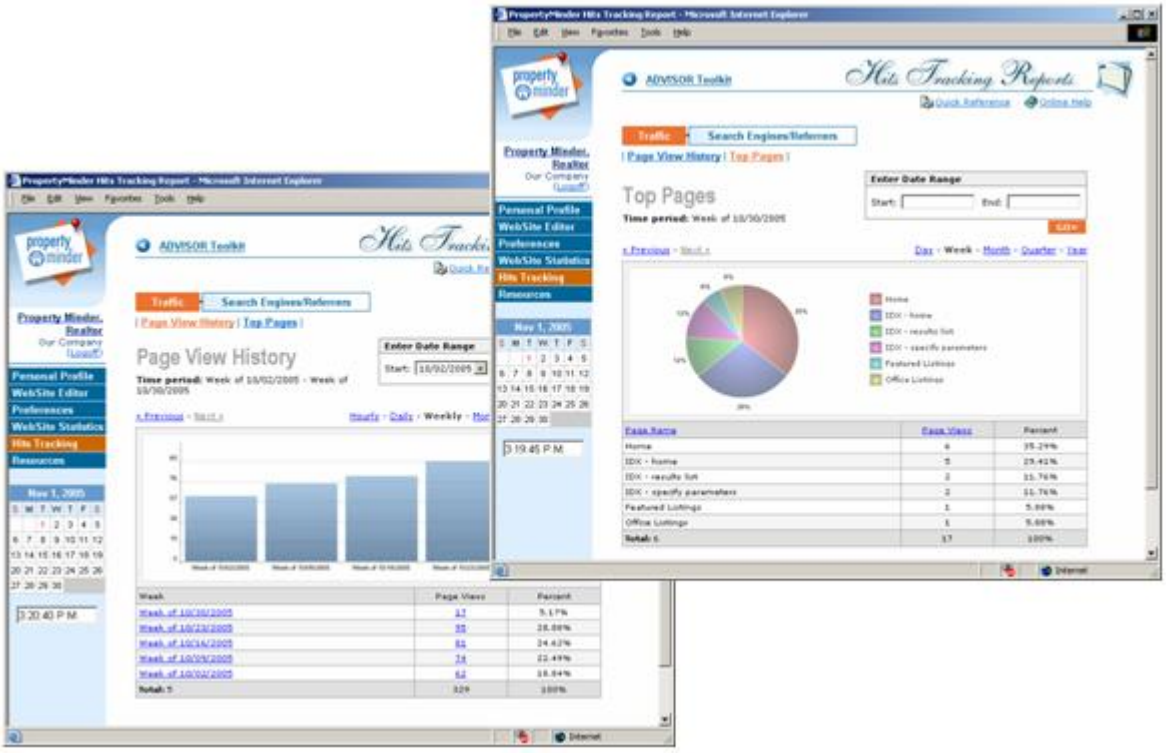
Hits Tracking

What metrics do I need to track to be successful in the Internet era?

1. Where is the traffic to your website coming from?
2. Which are the most popular pages on your site?
3. What is the most effective type of advertising for your website?
4. What are the popular keywords and search terms that lead visitors to your website?

How can I find the report on my website traffic?

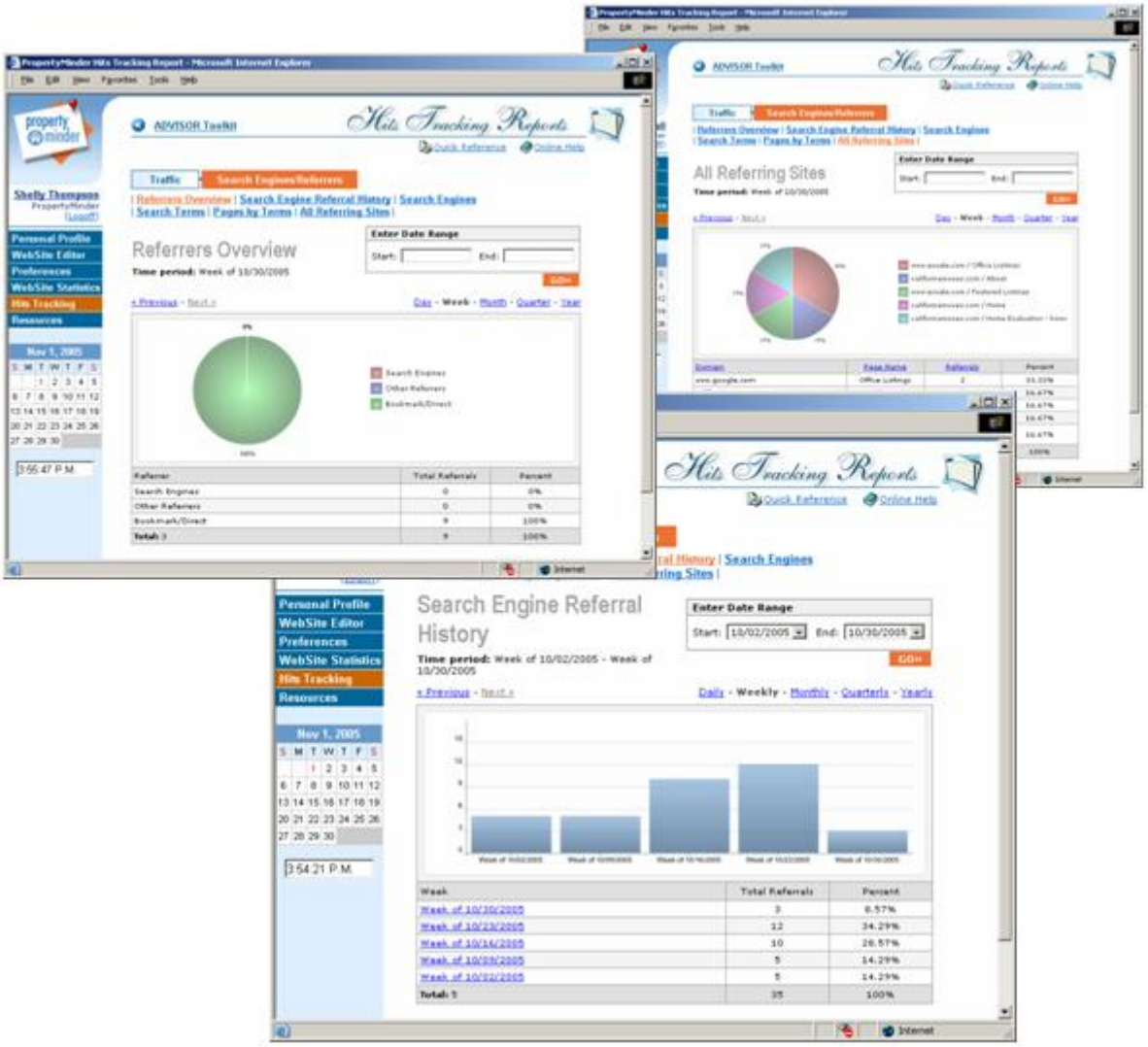
1. Click the **Hits Tracking** button on the left panel of your Toolkit screen.
2. Click on the **Traffic** button.
3. You will be able to see the Page View History graph report for a specific period of time.
4. Click on the **Top Pages** button to find the history of the top page views on your website for a specific period of time.



How can I view reports about Search Engine and other Referrers?

Get an overview of sites referring visitors to you, details on top referring search engines, search terms that led visitors to your site, popular pages that attracted visitors and specific referring sites.

1. Click the **Hits Tracking** button on the left panel of your Toolkit screen.
2. Click on the button for **Search Engines/Referrers**.
3. Find an overview of referring sites, Search Engine Referral History, Search Engines, Search Terms, Pages by Terms, and All Referring Sites reports.



Resources

What documents can I find in the Resource Center?

You can find PDF formatted forms, reports, help manuals, white papers, tutorials and guides in the Resource Center. Click **Resources** on the left panel of your Toolkit and then click on a link to download a selected document.

iMARKETING Tutorials

- Marketing Seminar

Search Engines Advertising

- Pay-Per-Click (PPC) Program Details
- A Guide to PPC Advertising
- PPC Subscription Agreement
- Understanding SEO (Search Engine Optimization)

Lead Forms

- Open Homes Lead Form

For Sellers Reports:

- Staging Your Home
- What is that smell?
- Hiring a Real Estate Agent
- Home Inspection
- Foreclosure Risk
- I want to sell my own home.

For Buyers Reports:

- Buyer Home Inspection
- Preparing to Buy
- Condo or Single Family Home
- New home or a resale?
- Moving Tips
- You need a Realtor
- Renting vs Buying

Free Reports:

- Tips for the homebuyers GETTING STARTED
- Tips for the homebuyers GENERAL FINANCING QUESTIONS
- Tips for the homebuyers CLOSING
- Seller Tips PRE-MARKETING CHECKLIST
- Making Your Move Less Stressful
- Real Estate Terms Dictionary

Account Billing Form:

- Billing Form - update your credit card information online.

Product Training Videos

What are the topics covered under the Training Videos?

The following is a list of all the videos within your Online Help pages.

- **Toolkit Overview (5:41 min)** - Summary of all major tools available in your PropertyMinder Toolkit.
- **Contact Management (2:55 min)** - Get organized, fully automate your follow-up and earn more referrals. Add and edit new contacts, groups and categories. Import your contacts, manage each client's profile, check client activity and keep track of all email messages that were sent to your clients.
- **Updating My Account Information (1:52 min) -** Change your password, your contact information and your logo.
- **New Website Editor (2:56 min)** - Select different theme colors, layouts, banners and customize your web-site view.
- **How to Create a Custom Page (2:02 min)** - Create your own website pages by typing your own text, adding hyperlinks, inserting photos and more.
- **How to Create Lead Capture Forms (3:36 min)** - Add your own special Lead capture forms to your website using new web-site editor.
- **How to Use Auto Lead Capture (2:32 min) -** Add your own special promotions to your website and capture more leads.
- **Importing Contacts (2:53 min) -** Quickly import your contacts into your PropertyMinder CRM.
- **Inventory Manager (3:24 min) -** Add featured listings, pocket inventory and rentals to your website listing showcase.
- **MLS Searches (3:15 min) -** Use MLS tools to work with multiple buyers and automate follow-up with your clients and prospects.
- **How to Create Custom IDX Links (3:38 min) -** Create your custom IDX search and add a link to your website.
- **Open Houses And Winning Listings (13:44 min) -** Display your current open house schedule to prospective buyers and present this to your sellers as a tool to win listing appointments.
- **Transaction Progress Report (3:28 min) -** Record all the updates for your client,s listing in one place and send them important appointments for escrow.
- **Follow Up Campaigns (3:32 min) -** Provides a variety of messages that can be sent to different groups or individuals for birthdays, anniversaries and more. Traces of all communication with contacts including messages sent and timestamps are available on each contact's page within the Toolkit.
- **Virtual Tour (2:53 min) -** Create seamless Virtual Tours for your prospect,s property to help you win a listing appointment.
- **Uploading Disclosures and Supporting Documents (2:48 min) -** Upload supporting documents and disclosures for your listing through Inventory Manager. Authorize who may and may not view your files.
- **AccelerAd (2:37 min) -** Learn how to easily post your listings to Craiglist.
- **Comparable Market Analysis -** Helps you create a Comparable Market Analysis Report. Send a report that gives instant home value to your prospective client.

Client Relationship Management

What can I do with the Client Relationship Management?

The CRM tool manages contacts that have been automatically captured on your website, manually added or imported from Microsoft Outlook or another contact database.

The Client Relationship Management tool allows you to:

1. Create a new contact manually.
2. Edit/update contact information and choose a custom salutation for each contact.
3. Import contacts into your CRM, or export them out to Outlook or another contact database.
4. Create and manage contact groups.
5. Create and assign automated Follow-up Campaigns for all clients, group of clients or individual contacts.
6. Send personalized messages, holiday greetings, market updates, self-promotion and prospecting messages to your client or all contacts.
7. Work with the Message Library to choose pre-written messages or to add your own messages that you can use while creating an event. Examples include: self-promotional, greeting, introductory, seller, buyer, thank you, birthday, home anniversary and other messages.
8. Enter the MLS number of single or multiple listings and email the listing(s) to all contacts in the contact group.
9. Add top selling agents to your CRM Networking contact group and send them your new listings and email updates on existing listings.
10. Manage and view source details of online leads captured on your website.

What are the CRM quick-links on the toolkit?

The CRM quick-links on the **Admin Toolkit** allow you to:

- Find a particular contact using the Find Contact link.
- Add a new contact to your contact list using the New Contact link.
- View your Contact List by clicking the Contact List link.

How can I find visitor information captured by my website?

Your website automatically captures your website visitor's information via the various lead capture forms you have on the site. The captured visitor's information is automatically stored in your SOI group. You can review your captured leads within the first page of you CRM as seen below.

How can I add new contacts to the Contact Manager?

You can add new contacts manually, or import them from your Microsoft Outlook email account.

To add a contact manually:

1. Go to the Client Relationship Management.
2. Click the **New Contact** button at the top of the page.
3. You can specify which group to put this contact under.
4. Enter the primary and secondary contact information. You can also put confidential notes about the client and then click **SAVE** at the bottom of the page.

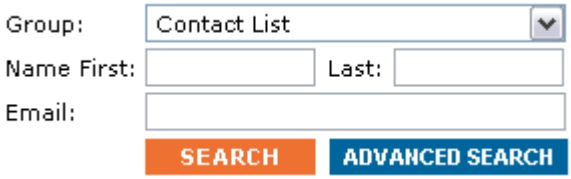
To import contacts from Outlook, or other CRM:

1. Go to the Client Relationship Management.
2. Click the **Import Contacts** button at the top of the page.
3. Follow the instructions listed on the page. (You may want to print this page. If you need further help on importing contacts, please call (800) 743-5820)

How do I delete a single Contact?

1. To delete a contact from your CRM, you must login to your Admin Toolkit.
2. Go to Client Relationship Management.
3. Select Contact List to see a list of all your contacts.

4. Search for your contact by name or email address.



5. When you find the contact record, you will see a trash can icon on the right hand side. Select the trash can icon to delete the contact and all associated searches. There is currently no mass delete option; you will need to delete contacts one at a time.

How can I create new groups?

You can create and customize your own contact groups.

To add a group:

1. Go to Client Relationship Management tool.
2. Click the **Groups** button.
3. Click the **Create New Group** button.
4. Name the Group and define its position in the CRM.
5. You can add members from the other groups to the new group you have just created.
6. Click **SAVE** at the end of the page to save changes.

How can I build my network group?

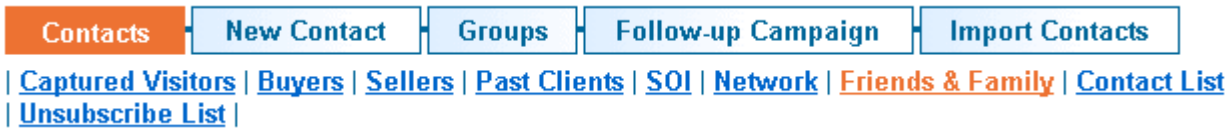
You can now automatically add the names of other agents in your office into the network group.

1. Go to the Client Relationship Management tool.
2. Click the **Import Contacts** button.
3. Click the link Load My Office Agents.

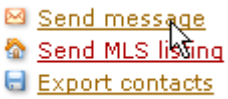
4. Click the **Upload** button to add all your office agents in the list to your Network group.

How can I send a message to an entire group?

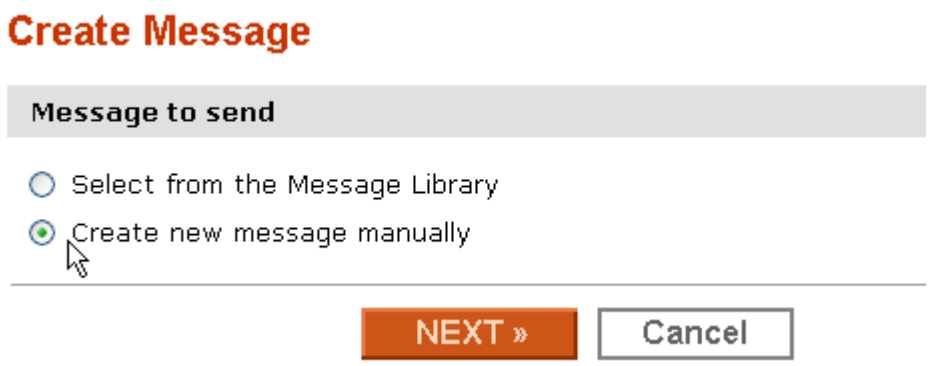
1. Login to your **Admin Toolkit** and select **Client Relationship Management**.
2. Select the underlined Group that you would like to send a message to.



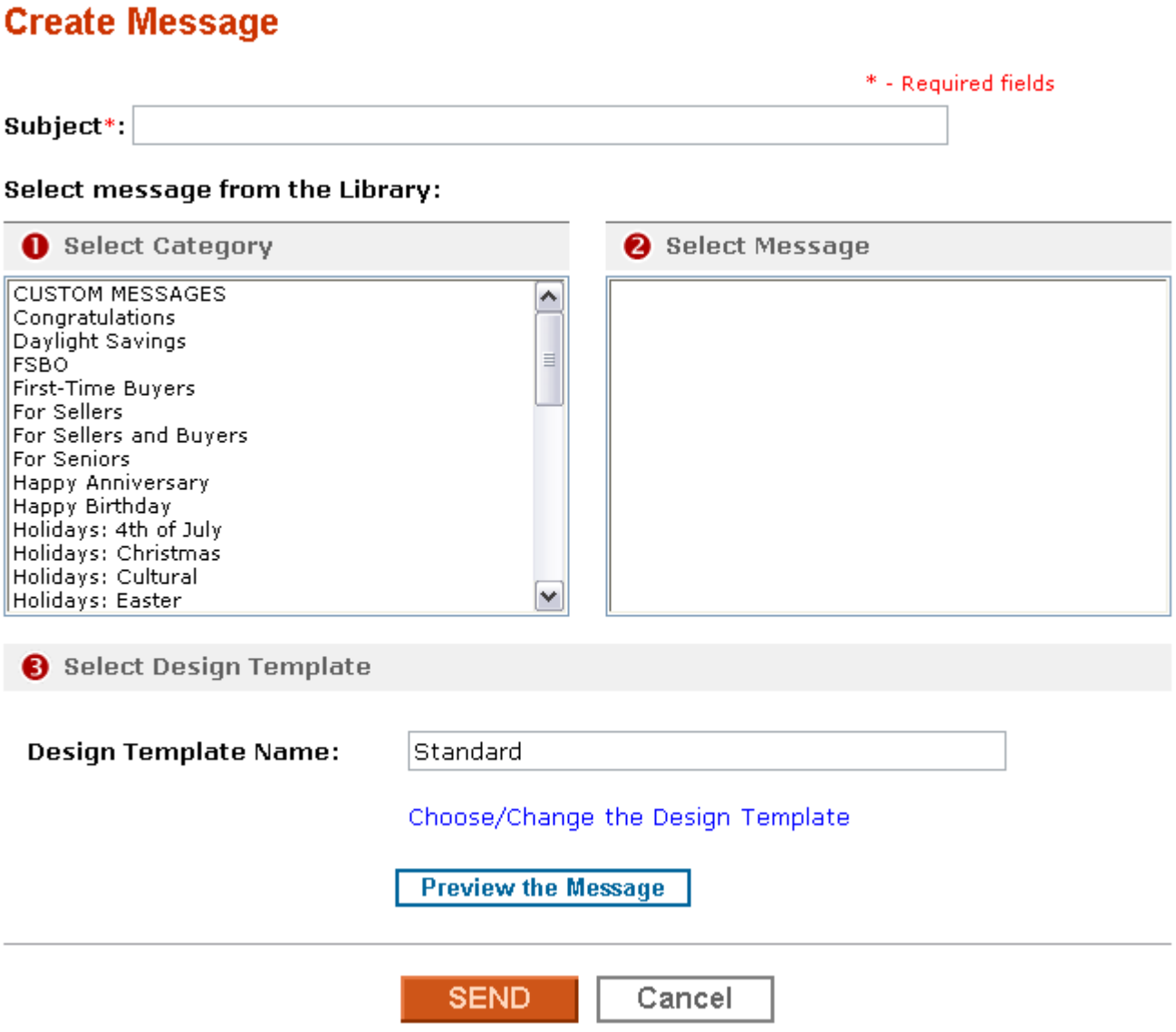
3. You will be given the option to **Send Message**. That will allow you to send a message to the entire group.



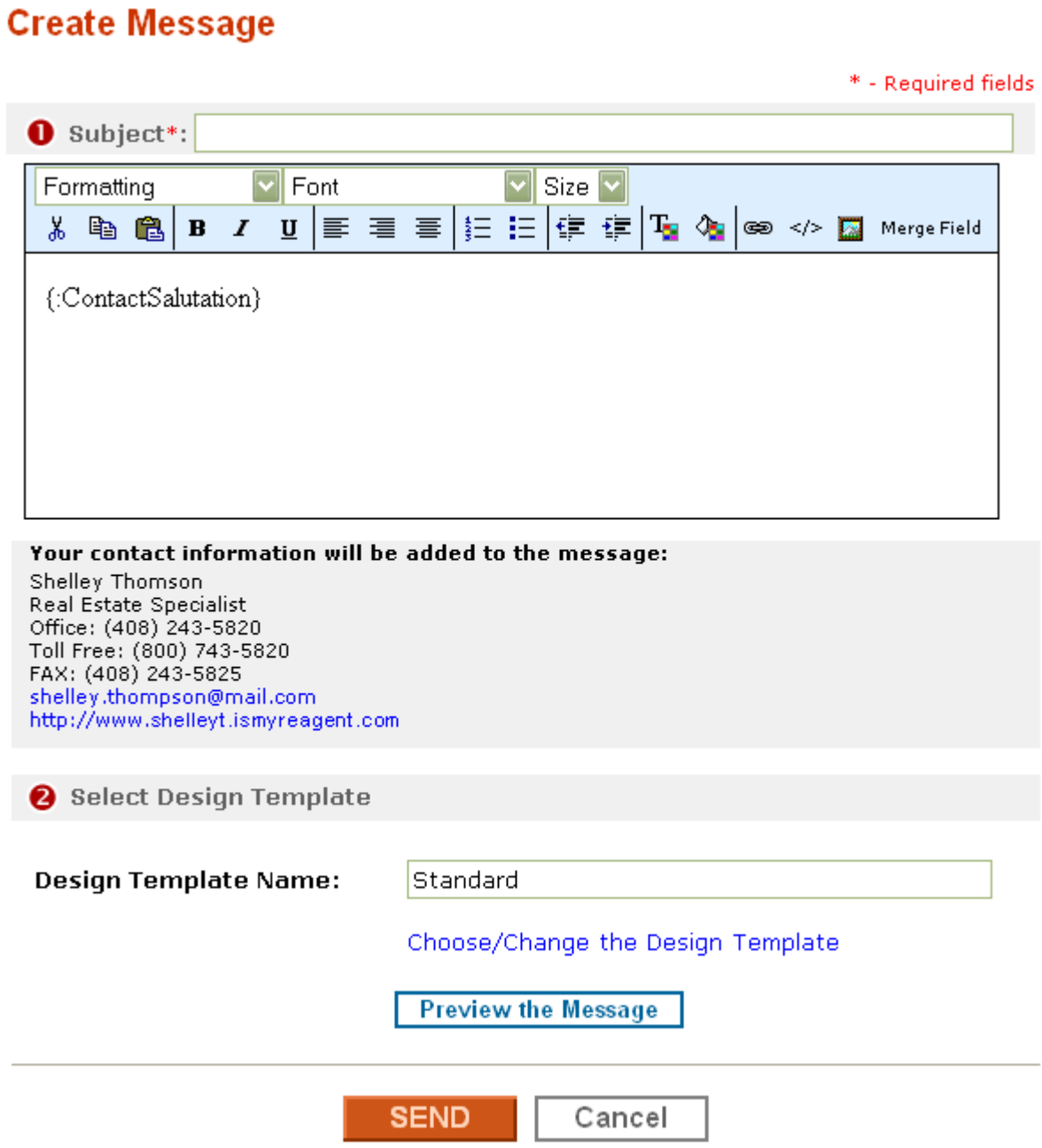
4. You will then have the option to select an existing Message from the **Message Library** or you can select **Create new message manually**.



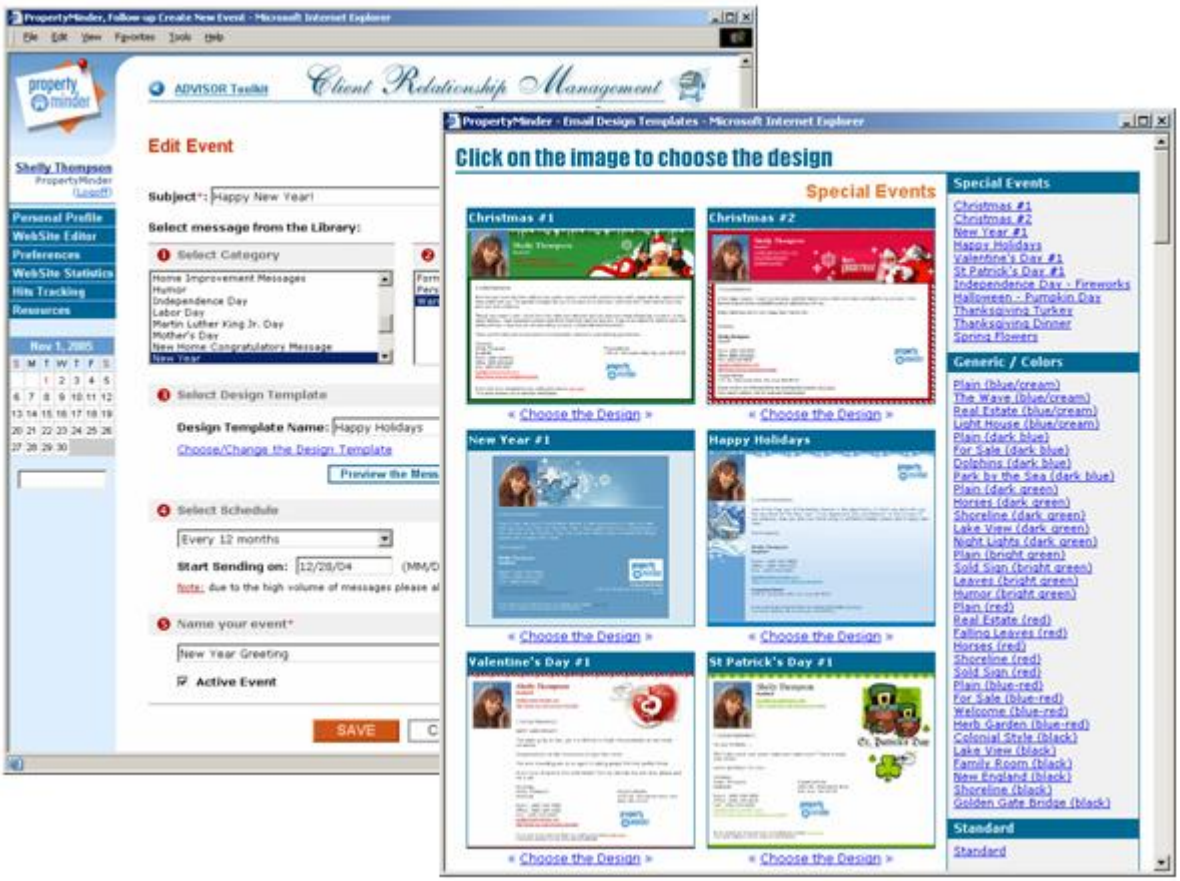
5. If you choose a preexisting message from the Message Library, you will be taken to the Library. You will then be able to select which message is most appropriate.



6. If you manually create your message, you will have a blank template.



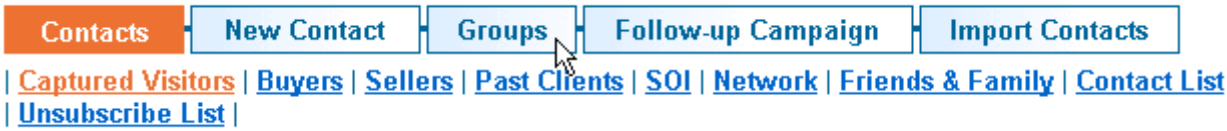
7. You can select Choose/Change the Design Template to add a nice template for your message.



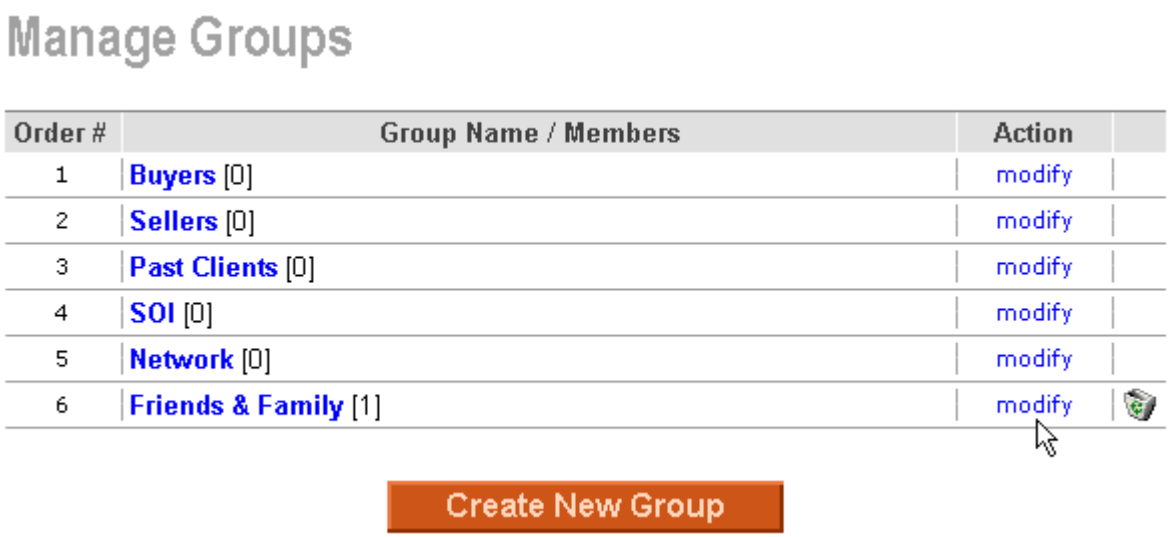
Please be sure to Preview your message before you send it to your Group

How do I remove a contact from a group without deleting the contact record?

1. Login to your **Admin Toolkit** and select Client Relationship Management.
2. Select Groups.



3. You will be taken to the **Manage Groups** section. You can create, delete or modify existing or new groups. Select **Modify** to add or remove contacts from the Group. Contacts can be members of multiple groups.

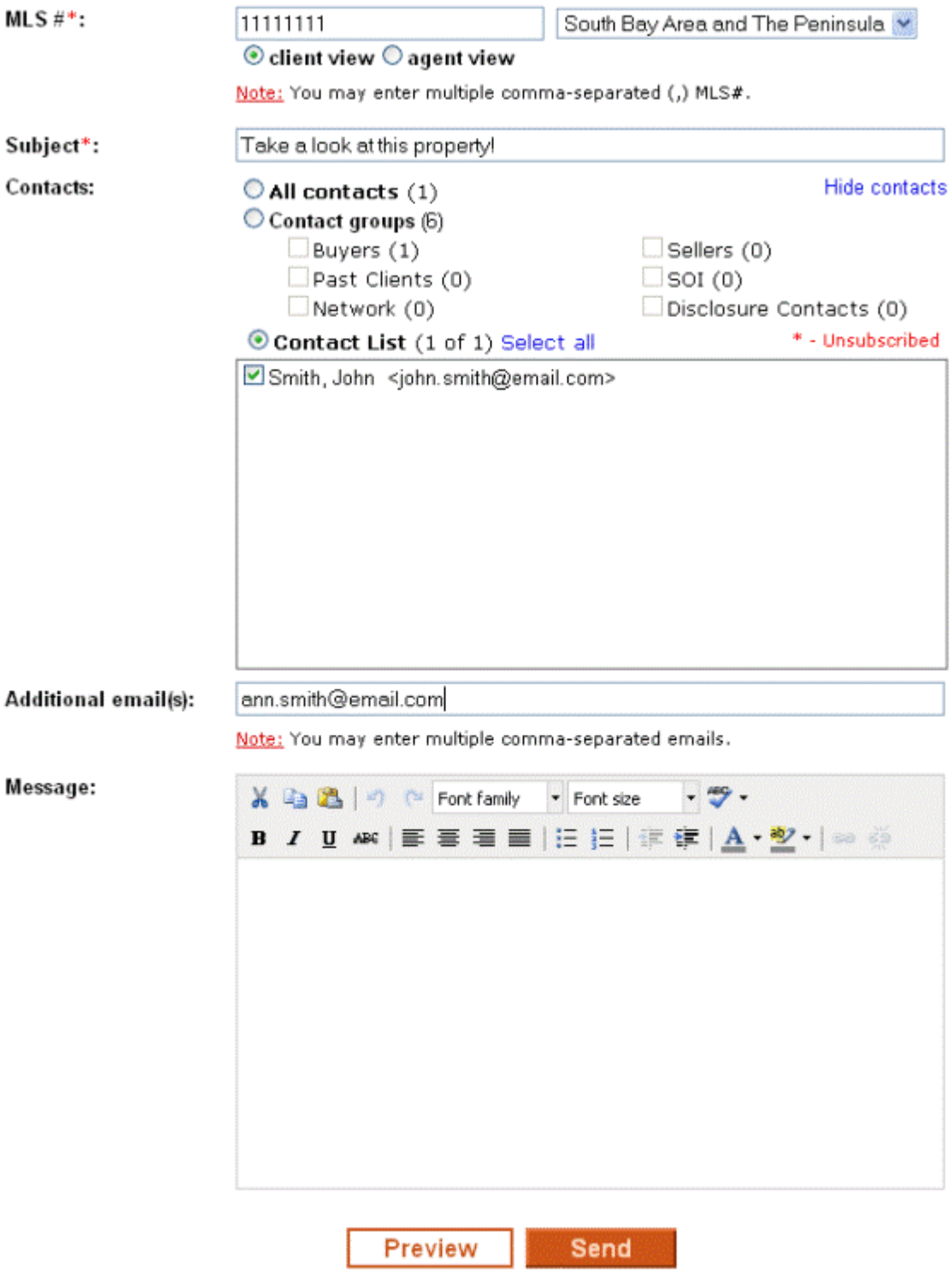


4. When you select **Modify**, you will be taken to the **Edit Group** page. You can now add or remove contacts from the group.
5. Click **Save**.

How can I email MLS listing(s) to specific contacts?

You can email a personalized message to your contact group with selected MLS listing(s) in the body of the email message.

1. Go to your **Admin Toolkit**.
2. Click the **Listings by Email** button.



3. Enter desired MLS listing number(s). You may enter multiple comma-separated (,) MLS numbers.
4. Enter a Subject for the message.
5. Select the email address(es) of your recipient(s).
6. Type out a personal message, add links and format the message.
7. Select < client view > if you are sending this listing to buyers, sellers, SOI (Sphere of influence). Select < agent view> if you are networking with other agents.
8. Click **Preview** to preview the message or **Send** to send the message.

How does the Follow-up Campaign tool help me with relationship marketing?

The Follow-Up Campaign tool on the Client Relationship Management comes with fully automated, pre-scheduled campaigns with events such as holiday greetings, market updates, self-promotion and prospecting messages.

To find the Follow-up Campaign tool:

1. Login to your Toolkit.
2. Go to the Client Relationship Management.
3. Click the **Follow-up Campaign** button.

What makes up a campaign and how can I create a new campaign?

A campaign includes a pre-written message, e-card design and a scheduled delivery date.

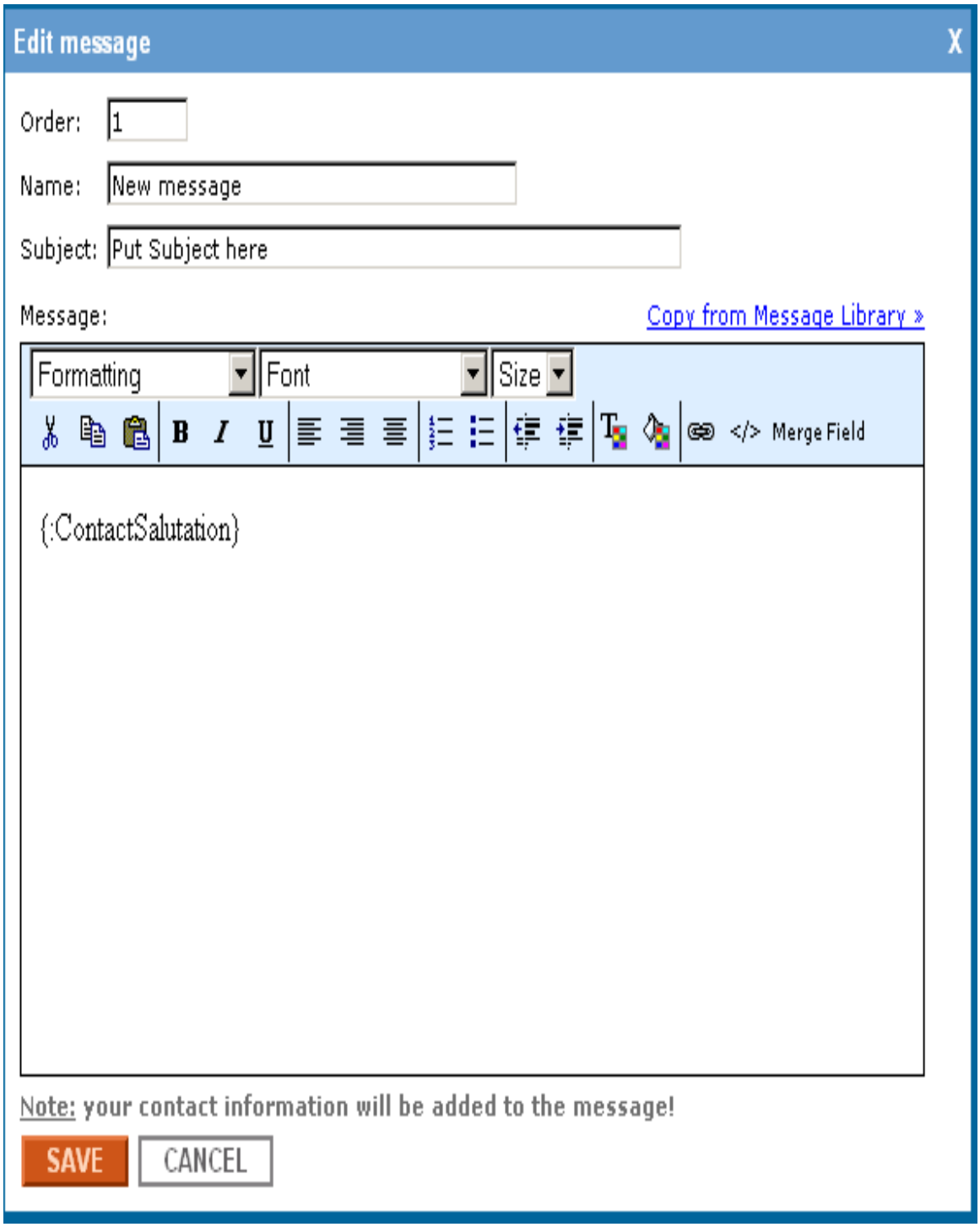
1. Login to your Admin Toolkit.
2. Go to Client Relationship Management.
3. Click the **Follow-up Campaign** button.
4. Click the **New Campaign** button.
5. Select your Campaign. **Annual** is sent once a year. **Drip campaigns** are messages sent in specified intervals (ex. monthly, weekly)

Annual Campaigns

- Choose the recipients. You may send the message to an **individual contact, group of contacts or to all of your contacts.**
- You may use our pre-written messages in the Message Library or you may create your own manually.
- Enter your campaign details and click **Save**.

Drip Campaigns

- Click on **New Campaign** to rename it. Hit the Enter key on your keyboard to save the new campaign name.
- The zero (0) specifies the activation date of your campaign. You must click **on 1.New Message** then **Edit** to modify it.
- Name your message, put a subject and type your text.
- You have the option to use one our pre-written messages by clicking **Copy from Message Library.**
- Click **Save.**



- To create the next message, click on Add New Message, and you will be taken to the same Edit message window.
- When done with all your drip messages, click on **Save**.
- Select your recipient(s).
- Pick your start date, design template and click **Activate**.

How can I edit/activate a campaign for all my contacts?

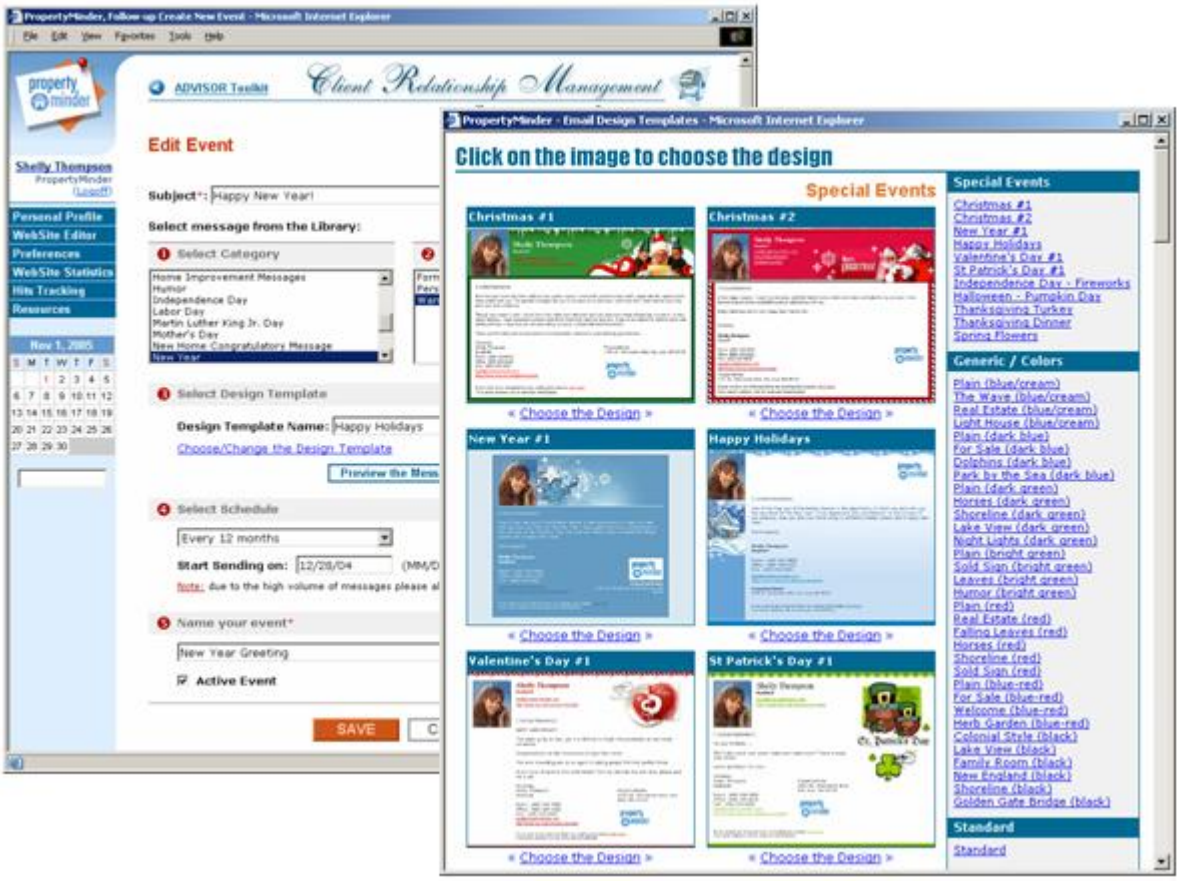
1. Login to your **Admin Toolkit**.
2. Go to Client Relationship Management.
3. Click the **Follow-up Campaign** button.
4. You will now see a list of all your current campaigns. You can click on **STOP** next to the campaign name or **RESUME.** Next to any campaign name, you can see the list of recipients. Review it and make sure that all clients you wish to receive this campaign are there.
5. If you'd like to delete a campaign, just click on the garbage can icon on the right
6. To edit a campaign, click on the specific campaign that you'd like to change.
7. To change the message(s) within the campaign, just click on the message title and **Edit**.
8. To change the campaign name, just click on the its name and rename it. Hit enter on your keyboard to accept the change.
9. To change the date interval, just click on the number and change it.
10. Edit recipients settings. Select **"Include all new users"** if you would like all your new captured visitors and manually created contacts to receive this message. Select **"Include new users from groups"** and then check off desired groups to send this campaign to all new clients from the corresponding groups. If you do not want new contacts to hit this campaign's list of recipients, just select **"Include new users from groups"** and do not check off any group. If you would like to apply these sending rules to all existing clients in your contact list, then check off the option **"Apply these settings for all existing contacts"**.
11. Click **Save** when you're done

How can I change the scheduled delivery date for the campaign?

1. Login to your **Admin Toolkit**.
2. Go to **Client Relationship Management**.
3. Click the **Follow-up Campaign** button on top.
4. Select the campaign that you wish to change.
5. Option #4 will allow you to put the new date.

How can I choose a different e-Card (design template) for the campaign?

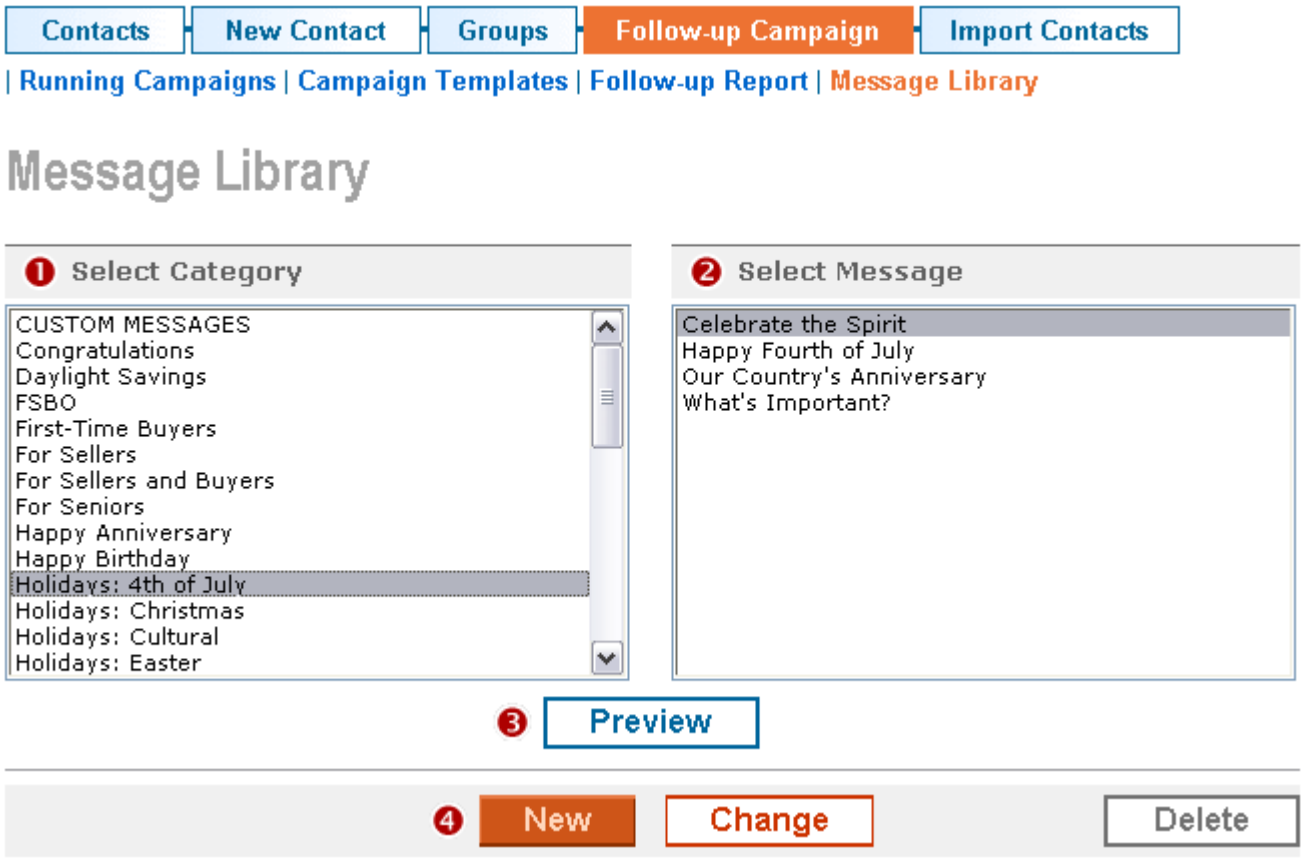
1. Login to your **Admin Toolkit**.
2. Go to **Client Relationship Management**.
3. Click the **Follow-up Campaign** button.
4. Select the campaign that you wish to change.
5. Option #3 will allow you to change the design.


PropertyMinder, Follow-up Create New Event - Microsoft Internet Explorer
ADVISOR Toolkit
Client Relationship Management
Edit Event
Shelly Thompson
PropertyMinder
Personal Profile
WebSite Editor
Preferences
WebSite Statistics
Hits Tracking
Resources
Subject*: Happy New Year!
Select message from the Library:
Select Category
Home Improvement Messages
Mother
Independence Day
Labor Day
Martin Luther King Jr. Day
Mother's Day
New Home Congratulatory Message
New Year
Select Design Template
Design Template Name: Happy Holidays
Choose/Change the Design Template
Preview the Mess
Select Schedule
Every 12 months
Start Sending on: 12/28/04 (MM/D
Note: due to the high volume of messages please al
Name your event*
New Year Greeting
Active Event
SAVE
PropertyMinder - Email Design Templates - Microsoft Internet Explorer
Click on the image to choose the design
Special Events
Christmas #1
Christmas #2
« Choose the Design »
New Year #1
Happy Holidays
Valentine's Day #1
St Patrick's Day #1
Special Events
Christmas #1
Christmas #2
New Year #1
Happy Holidays
Valentine's Day #1
St Patrick's Day #1
Independence Day - Fireworks
Halloween - Pumpkin Day
Thanksgiving Turkey
Thanksgiving Dinner
Spring Flowers
Generic / Colors
Plain (blue/cream)
The Wave (blue/cream)
Real Estate (blue/cream)
Light House (blue/cream)
Plain (dark blue)
For Sale (dark blue)
Dolphins (dark blue)
Park by the Sea (dark blue)
Plain (dark green)
Horses (dark green)
Shoreline (dark green)
Lake View (dark green)
Night Lights (dark green)
Plain (bright green)
Sold Sign (bright green)
Leaves (bright green)
Humor (bright green)
Plain (red)
Real Estate (red)
Falling Leaves (red)
Horses (red)
Shoreline (red)
Sold Sign (red)
Plain (blue-red)
For Sale (blue-red)
Welcome (blue-red)
Herb Garden (blue-red)
Colonial Style (black)
Lake View (black)
Family Room (black)
New England (black)
Shoreline (black)
Golden Gate Bridge (black)
Standard
Standard

What is the Message Library and where can I view it?

The message library contains a library of pre-written messages that you can use while creating a campaign. Examples include: self-promotional, greeting, introductory, seller, buyer, thank you, birthday, home anniversary and other messages.

PropertyMinder will continue to add more templates to this Message Library in the future. If you have any suggestions, please email support@propertyminder.com.



To view the message library:

1. Go to Client Relationship Management.
2. Click **Follow-up Campaign**.
3. Then click the Message Library link under the Follow-up Campaign button.

To add your own message to the message library:

1. Select **New** button to compose a new message.
2. Click **Save** to save it in the **Custom Message** category in the Message Library.

How can I edit an existing message in the Message Library?

1. To edit an existing letter in the Message Library, select an existing message from among the different categories, and click **Change** to modify the message.
2. On the Edit Message page, click **Save As** and provide a name for the message that you would like to save in the Message Library (Custom Messages category).

How can I export contacts to Outlook or other CRM?

Most industry standard email, PDA or CRM software is capable of reading and loading data exported and stored in comma separated formatted files. You can export contacts from every contact group of you **Admin Toolkit** CRM. To do this:

1. Go to **Client Relationship Management**.
2. Click the **Contacts** button.
3. Click on the contact group you would like to export (example: Buyers).
4. Click the link **Export contacts**.
5. Follow instructions.

Where can I find the details of my website visitor's requests?

The alert, with information describing the nature of the visitor's request is emailed to you immediately after your visitor completes and submits the request. The request is also recorded in the note section of the contact record.

To view the request:

1. Go to **Client Relationship Management**.
2. Click the **Contacts** button.
3. Click the **Captured Visitors** link.
4. Click on the name of the contact.
5. Within the individual contact page, you will see the details of the visit.

What is the purpose of the unsubscribe group?

According to current anti-Spam laws, all e-mail messages sent to a group must provide a method by which the recipient may "opt-out".

All messages including auto follow-up, listing flyers and e-mails sent through the PropertyMinder CRM tool will automatically handle **unsubscribe** requests.

How does "unsubscribe" work?

Email messages addressed to contacts in your PropertyMinder CRM, as well as automatically generated quarterly or monthly follow-up messages now offer the recipients an option to unsubscribe.

When the recipient of your email chooses to unsubscribe and clicks the unsubscribe link in the email, the PropertyMinder technology automatically copies the contact record to a special **Unsubscribe List** group (Look for this group in the Client Relationship Management tool in your Toolkit). PropertyMinder ensures that no messages will be sent to these people in the future.

How can I handle an unsubscribe request emailed to me?

If you receive an email request from a client to unsubscribe them from future messages, you can add the clients email address to the unsubscribe group.

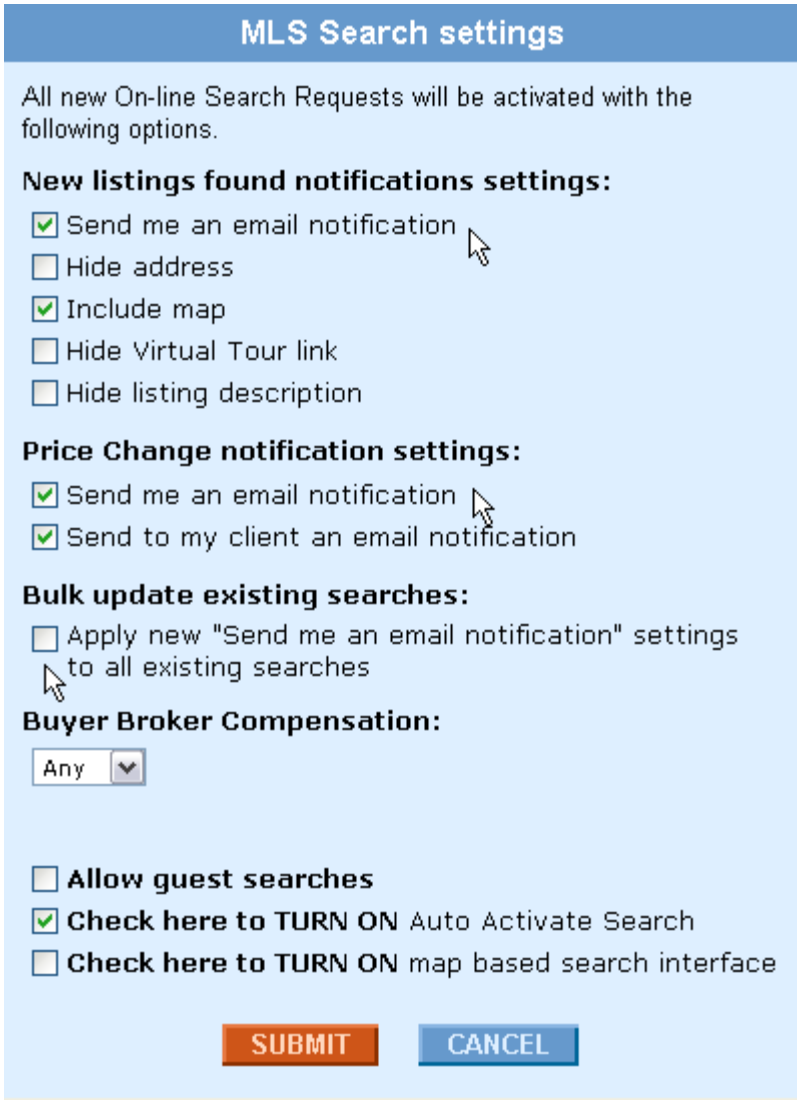
To do that:

1. Go to the **Client Relationship Management**.
2. Click the **Contacts** button.
3. Click the **Unsubscribe List** link.
4. In the blank space type in the email of the client requesting to be unsubscribed and click **Add**.

How do I disable the New Listings Found and Price Change Notices?

1. Login to your **Admin Toolkit** and select **MLS Searches**
2. Select **MLS Search Settings**.

3. You will need to uncheck **Send me an email notification** for **New Listings** and for the **Price Change**.
4. Check the box for Bulk **Update Existing Searches** and then click the **Submit** button. It will take care of updating the settings on all your existing searches



How can I send message with attachment from CRM?

1. Log in to your **Admin Toolkit** and go to **Website Editor**.
2. **For framed websites:** Scroll down past **Your Links** section. Below **Custom Page 5**, you will find the link for **Custom Files Management**. Click on it.
3. **For frameless websites:** Click the **Buttons** icon and then click on the **Custom Files Management** link.
4. Under the main folder, click **Browse**, select the file you wish to email (not larger then 2 Mb) and click **Add File**
5. Right next to the name of the file, you will see a **Get URL** option. Click on it. You will see the box with the link looks like *http://isvr.net/usr/1035283752/CustomPages/...*
6. Copy the link and click **OK**. Close Custom Files Management.
7. Go to **Client Relationship Management**, click on the group you wish to send the message to, click **Send Message**, and choose **Create Message manually**.
8. Type in the words that you want to be clickable, highlight them, click on the **Chain Link** symbol, paste the link inside and click **Insert**. Preview and test the link before sending.

As you send this message, the recipients will click on the words that you hyperlinked and the document will open. You can send images, PDF, Word, Excel and other types of files.

Note: You will need to keep the document in your **Custom Files Management** for as long as you think that your clients will still be clicking on it. There is no time limit of keeping the files in there.

What does "Bounced Email List" mean?

Sometimes your email message (*including automatically generated follow-up messages)* cannot be delivered to one or more of its recipients. It typically happens because of an invalid email address. Your message may be classified as SPAM and filtered out by mailing systems. If the list of recipients contains bad email addresses, our email delivery system automatically excludes such emails from your follow-up distribution lists.

To view/edit your Bounced Email List:

1. Login to your **Admin Toolkit**.
2. Click **Client Relationship Manager** and then **Bounce Email List** link at the top.
3. If you would like to restore the contact to receive your messages, simply click **Restore** right next to the contact.

MLS Searches

What can I do with MLS Searches?

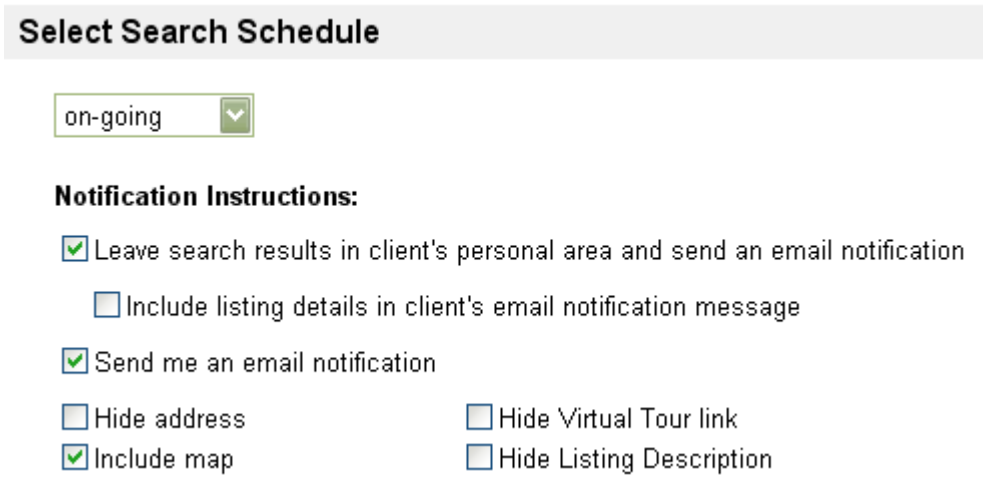
With MLS searches, you can:

1. Allow your clients to create online search requests on your website.
2. Create a search for your client using different filters, criteria and frequency.
3. Receive email notifications and wireless (mobile) alerts.
4. Edit the "New listing found" notification letter for your clients.
5. Include CMA in your search (subject for MLS system support).
6. Notify your clients about listing price changes.
7. Track/analyze your clients search activity.
8. Manage the amount of information to be shown to your client about listings found (hide/show address, map, description, virtual tour, etc.)
9. Manage unlimited number of current active MLS searches.
10. Deactivate (archive) the search.
11. View/re-assign/delete Ignored Searches and assign the auto clean-up of ignored searches.

How can I set up a new search?

To set-up a new search:

1. Go to MLS Searches.
2. Click **New Search**.
3. Select "Class" and property "Status".
4. For active searches indicate if you would like to get comparables (subject to the MLS system support).
5. Select the area for your search (up to 20 areas are permitted).
6. Test the search by clicking **Search MLS** at the bottom of the page.
7. You can delete unwanted listings from the "Properties found" list by checking the delete box.
8. If you are satisfied, click **Save Search**.
9. Select a client from the existing Contact list, or click **Create new client** to add a new entry to your CRM.
10. Continue to the next page and name your search.
11. Select how frequently you want to run this search. We recommend that you choose a high frequency when setting-up searches for "A" buyers and low frequency for less committed buyers.
12. Choose if you want the system to send you an email notification and place a copy of the results into your client's personal area.
13. Hide/show address, hide/show map, hide/show Virtual Tour link, hide/show listing description.



14. Customize the notification message.
15. Click **Activate Search**.

How can I auto activate searches requested on my website?

To activate the auto activate searches feature:

1. Go to MLS Searches.
2. On the On-line Search Requests screen, click the MLS Search Settings link.
3. Set-up Auto Activate Search settings, check TURN ON Auto Activate Search and click **SUBMIT** .

NOTE: Online Search Requests submitted before turning the AUTO ACTIVATE SEARCH feature ON should be reviewed and activated manually.

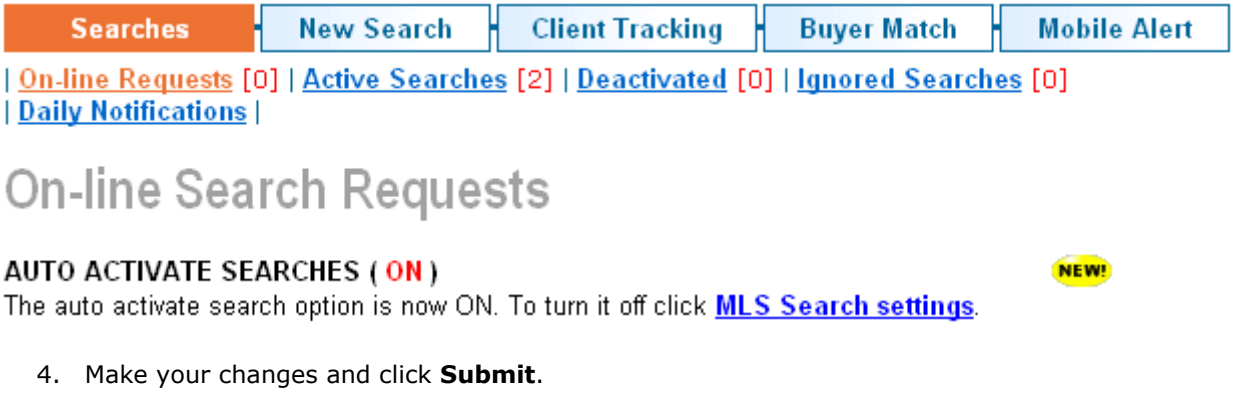
How can I verify the email address of a client who has requested a search on my website?

With the AUTO ACTIVATE SEARCH feature is ON, your system will automatically verify and register your prospects using a 3-way confirmation code algorithm.

Your client has to enter the code received in the email provided to them in the search request. If they have entered an incorrect email address they would not have received the code and thus will not be able to view the search results. Thus the system is programmed to verify the client's email address.

How can I update the settings for the auto activate search?

1. Login to you **Admin Toolkit**.
2. Go to **MLS Searches** page.
3. Click the link **MLS Searches Settings**



4. Make your changes and click **Submit**.

How can I exclude listing types from public MLS searches on website?

You may choose to hide certain property types from being searched on your website. For example, you may hide residential properties for rent if you only want the public to search for residential sales on your site. You can block your website users from creating MLS searches for certain property classes.

To do this:

1. Login to your **Admin Toolkit**.
2. Go to **MLS Searches** page.
3. Click on the link **MLS Searches Settings**.
4. Scroll down to MLS settings area. All listing classes are checked by default. Uncheck the property type(s) that you wish to exclude and click **Submit**.

NOTE: Even if you block some of the listing types for public searches, they will still be available for you within the Admin Toolkit.

How can I see my clients' favorite listings?

When your client views his saved search results, he may save some of the listings as his favorites.

To see your clients' favorites:

5. Login to your **Admin Toolkit** and go to **MLS Searches**.
6. Click the **Favorite Listings** link.

How can I automatically monitor and clean up my ignored searches?

- **Ignored Searches Detected**

To enable you to focus your efforts on clients who are actively viewing searches and avoid clogging your system with ignored or abandoned searches, the system automatically detects searches that are consistently displaying no activity. If there has been no activity on a search for over 6 weeks, it is suspected to be an ignored search.

NOTE: The PropertyMinder system monitors searches that are scheduled to notify your clients about new listings on an "ongoing" and "daily" basis and which have generated a significant number of "new property found" notifications.

- **Notifying your client and you about ignored searches**

The system proactively sends 2 email messages to clients with ignored searches, encouraging them to make use of the search results. At the same time, you as an agent will also receive a message notifying you about the ignored searches and their pending deletion.

Despite the two messages to your clients, if there is no activity on the searches for over 6 weeks and 7 days, the ignored searches are moved to the "Ignored Searches" folder where they are kept for 30 after which they are removed, unless you reactivate them before that.

Timeline	Message Notification	Ability to activate searches
After 3 weeks of inactivity	Client & Agent receive notification messages	Client can view searches and prevent them from being removed
After 3 more weeks of inactivity	Client receives a notification message	Client can view searches and prevent them from being removed
After 7 more days of inactivity	Message moved to Ignored Searches. Agent receives a message that the searches are moved to ignored searches	Agent can restore searches from Ignored to Active Searches
After 30 days in Ignored Searches	Searches are automatically deleted	Searches are permanently deleted and cannot be revived

How can I "turn off" the auto clean up of ignored searches?

1. On the left panel of the **Admin Toolkit**, click **Preferences**.
2. Scroll down to **Ignored Search Preferences** and check or uncheck the auto clean up of Ignored Searches.
3. To get more information on how this works, click the link next to **Understanding Ignored Searches**.

How can I prevent searches from being categorized as ignored searches?

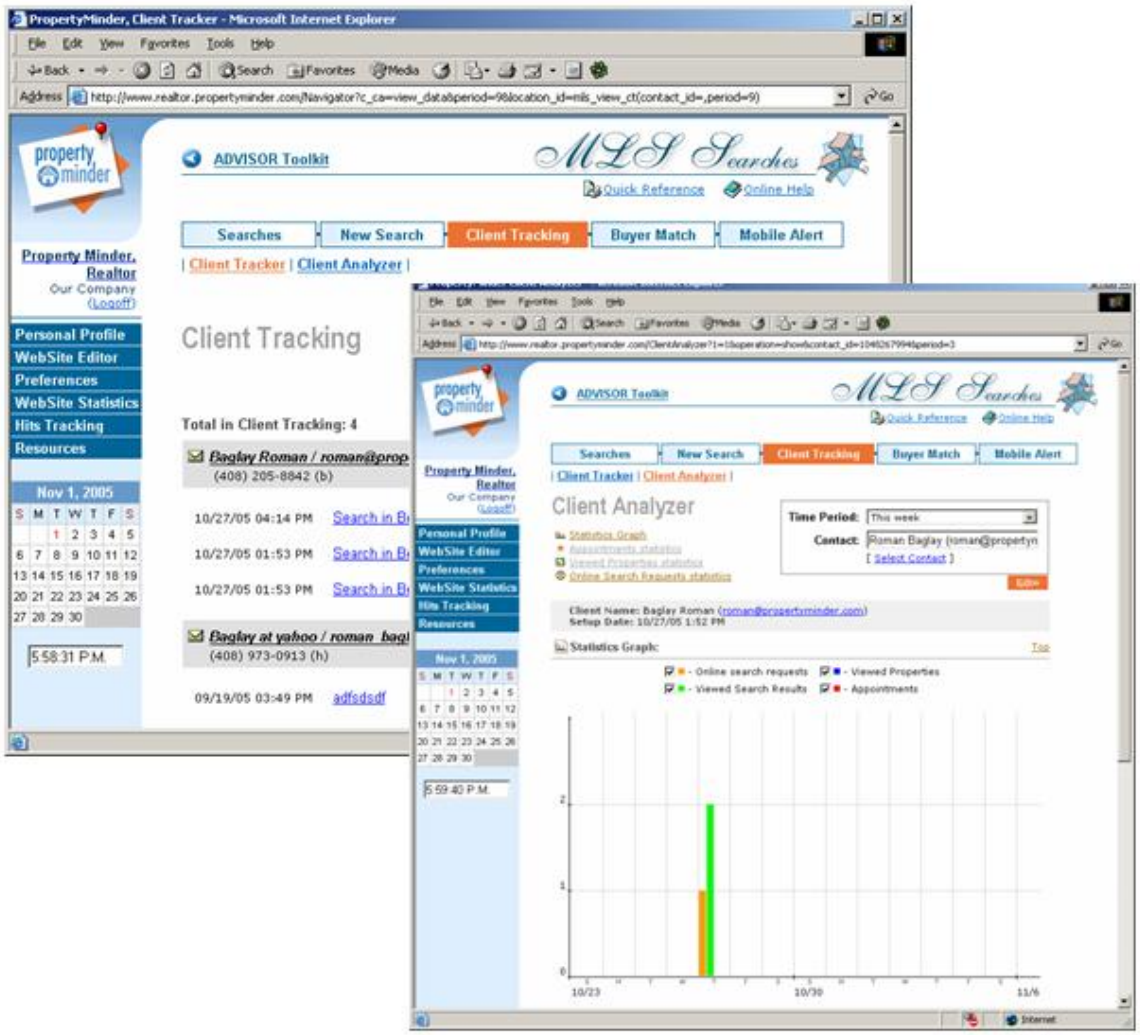
Edit the MLS search notification criteria to change the new listing updates to go out "weekly" or "monthly" instead of "ongoing". Searches that are scheduled with weekly or monthly notifications will not be included in ignored searches.

How can I track my client's search activity?

PropertyMinder's comprehensive client tracking tools monitor your client's activities, send alerts and offer detailed reports on demand for a particular listing. The Client Tracking tool is used to find the most recent increases in your client activities and spot the most active clients. Agents can use the Client Analyzer to further scrutinize the client's data to determine their motivational level.

This tool helps agents track client search activity, know who visits your website and determine which listings your buyers look at and when.

1. Go to MLS Searches.
2. Click the **Client Tracking** button.
3. You can choose the "Time Period" for which you want to view the activity
4. To analyze the activity of the client over a period of time, click the **Graph Client** button to the right side of the client's email address.


PropertyMinder, Client Tracker - Microsoft Internet Explorer
ADVISOR Toolkit
MLS Searches
Quick Reference
Online Help
Searches
New Search
Client Tracking
Buyer Match
Mobile Alert
Client Tracker | Client Analyzer
Property Minder, Realtor
Our Company
(Logoff)
Personal Profile
WebSite Editor
Preferences
WebSite Statistics
Hits Tracking
Resources
Client Tracking
Total in Client Tracking: 4
Baglay Roman / roman@prop
(408) 205-8842 (b)
10/27/05 04:14 PM
10/27/05 01:53 PM
10/27/05 01:53 PM
Baglay at yahoo / roman bagl
(408) 973-0913 (h)
09/19/05 03:49 PM
adfsdsdf
Nov 1, 2005
5:58:31 P.M.
Client Analyzer
Time Period:
This week
Contact:
Roman Baglay (roman@propertyn
[Select Contact]
Client Name: Baglay Roman (roman@propertyminder.com)
Setup Date: 10/27/05 1:52 PM
Statistics Graph:
- Online search requests
- Viewed Properties
- Viewed Search Results
- Appointments
10/23
10/30
11/6
5:59:40 P.M.

How can I analyze my clients search activity?

The Client Analyzer further extends PropertyMinder's powerful Client Tracking capability.

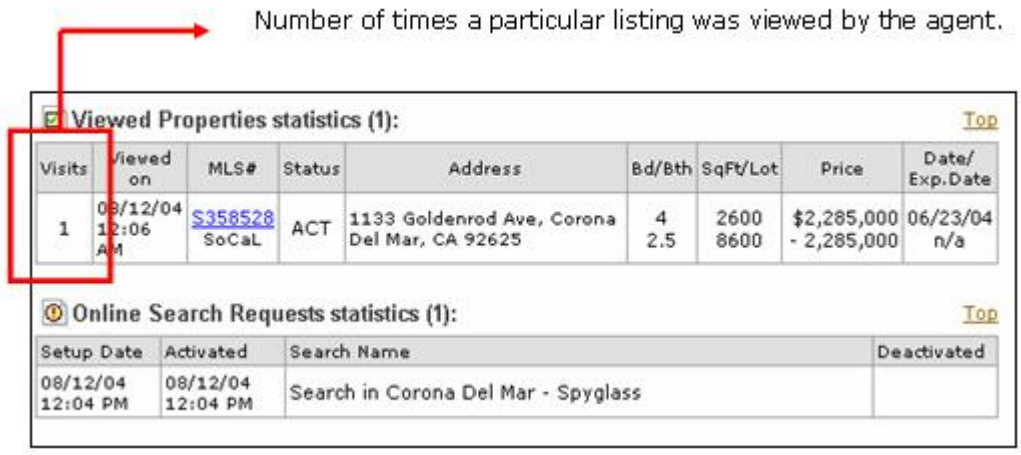
Using some proprietary algorithms, the Client Analyzer can interpret and display selected client activities over a specified period of time in an easy to read graphical format. You can measure each client's motivational level and analyze viewed listings and showing appointment request reports.

For instance the following graph represents a client's activity over an 8-week period.

Once the upward trend is detected, a closer look is recommended. Finally, a more detailed view can reveal your clients interest in specific properties and indicate their motivational level.

To analyze the activity of the client over a period of time:

1. Go to MLS Searches.
2. Click the **Client Tracking** button.
3. Click the Client Analyzer link.
4. Select a contact.
5. Click **GO**.
6. Review the client analyzer report information.
7. Scroll down to view the summary tables for "Appointment Statistics", "Properties Viewed" and "Online Search Requests".



What is Mobile Alert?

With PropertyMinder Mobile Alert, you can get notified on your cell phone or mobile device when a new lead makes a request on your website.

Mobile Alert allows you to get instant updates about appointment requests from your clients, new online search requests, price change notifications or new listings found.

To configure your phone service with your PropertyMinder website:

1. Provide your mobile device email address in the box corresponding to the type of alert you choose to receive.
2. Contact your wireless service provider, if you do not know the email address at which you can receive messages on your mobile device.
3. After you type your email in the fields based on the type of notifications you want to be alerted about, mark the **"Mobile Format"** check box if you want to receive the message in a concise text format (the text format is recommended).

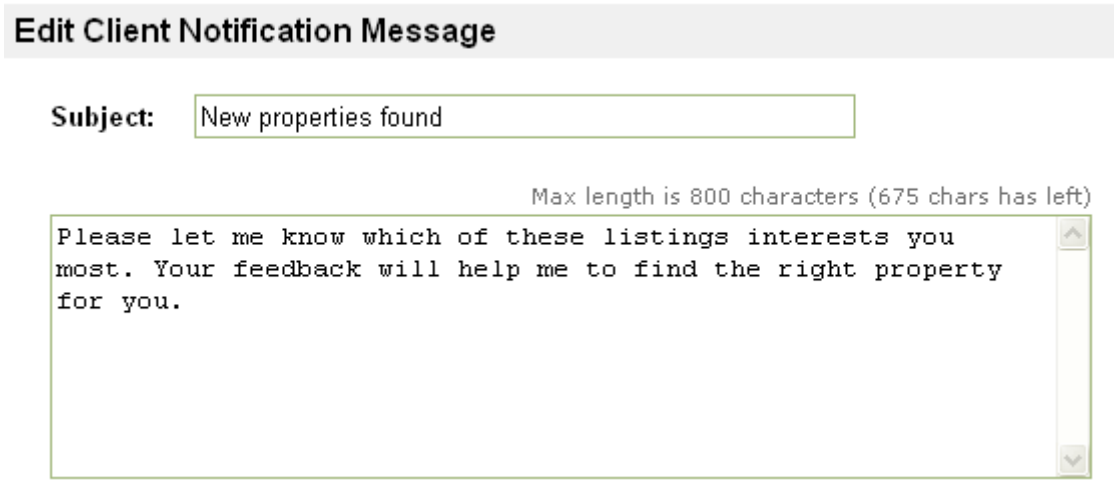
4. All notifications will be sent to these additional emails in short "Mobile format". It will not affect the notifications sent to your primary email account.

Click **Submit** to save changes.

How can I customize the message that the system emails to my customers?

You can customize the email message sent to your clients while setting up a new search, or you can edit an already active search.

1. Go to MLS Searches.
2. Select **Active Searches**.
3. Select the search and click **Edit Search Criteria**.
4. Scroll down until you see "E-Mail Message Text For your Client"
5. Review the default message found in the entry field areas.
6. Change text in the top and bottom entry fields if desired.



7. Check the **Memorize for future use** box if you want this message to become the default message.
8. Click **Save Search**.

NOTE: We recommend that you include text in your message inviting people to revisit your site for other services like community information, buyer and seller reports, home contractor services, home evaluation etc.

How should I use search scheduling?

You should select ongoing search notifications when working with active buyers and sellers. You may want to send past sales information to sellers to educate them about the value of their home.

Use monthly or weekly schedules as your follow-up strategy when setting up a search with existing and past clients. This tool can also be used to work with prospects that are not actively looking for homes.

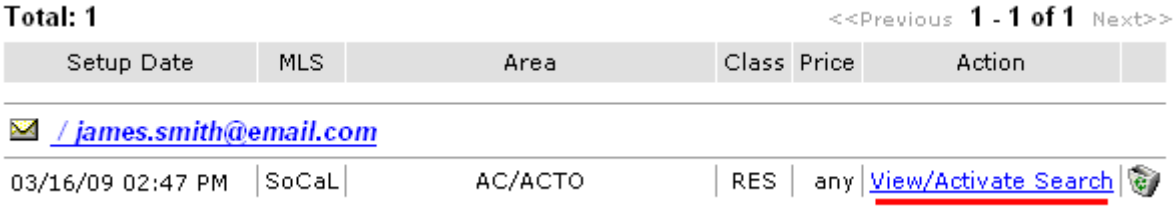
How can I edit the search?

1. Go to MLS Searches.
2. Select **Active Searches**.
3. Select the search and click **Edit Search Criteria**

4. Edit the search.
5. Test the search by clicking **Search MLS** to view the search results.
6. You can delete unwanted listings from the "Properties found" list by checking the **delete** box.
7. If you are satisfied, click **Save Search**.

How can I find new leads and MLS search requests?

1. Go to MLS Searches
2. Select **Online Search Request**.
3. Select one of the searches.
4. Click the **View/Activate Search** link to review, test and activate the search.



5. To test your search, click **Search MLS**.
6. To activate the search, click **Save Search**.

How can I receive daily client activity reports?

You can schedule a daily client activity report from your toolkit for the current day, current week and the last two weeks. Use these reports to analyze the trends and frequency in buyer activity and properties viewed. Spot buyers who are ready to be contacted.

If you do not wish to receive this report:

1. Go to MLS Searches on your toolkit
2. Click the MLS Searches button and then click Daily Notifications
3. Uncheck "Yes, I would like to receive Daily Client's Activity email" and submit the change.

What does "deactivate search" mean?

When the search is deactivated, the search criteria and search results are saved in the system. The system does not run automated searches until the search is reactivated.

To deactivate the search:

1. Login to your **Admin Toolkit** and select **MLS Searches**.
2. Select **Active Searches** to see a list of all current searches.

3. Find the Search record that you would like to deactivate. Under the action section, you will see the option to **Deactivate Search**. You will have the option to **Reactivate** the search at a later date if necessary.
4. To completely delete the search, select the Trash Can icon and you will completely delete the search.

What can I do with the Buyer Match tool?

PropertyMinder's BUYER MATCH technology allows you to instantly find potential buyers within the PropertyMinder Agent Alliance, and announce your listing.

You can use the BUYER MATCH tool to contact agents who have buyers searching for homes similar to your listing, or to estimate how many buyers are searching for homes in a given location and price range.

You can find potential buyer prospects for your listing within:

- PropertyMinder Agent Alliance members <buyer search>
- Your buyers with active searches

You can also use the buyer match tool to:

- Expand your agent network through the PropertyMinder Agent Alliance.
- Instantly show a potential seller how many buyers you can advertise their listing to.
- Persuade the seller to make improvements to the property by showing them the effect of adding a new feature on the price and marketability of the listing.
- Determine the appropriate market price of the listing for a quick sale.
- Give your buyers a larger choice of listings.

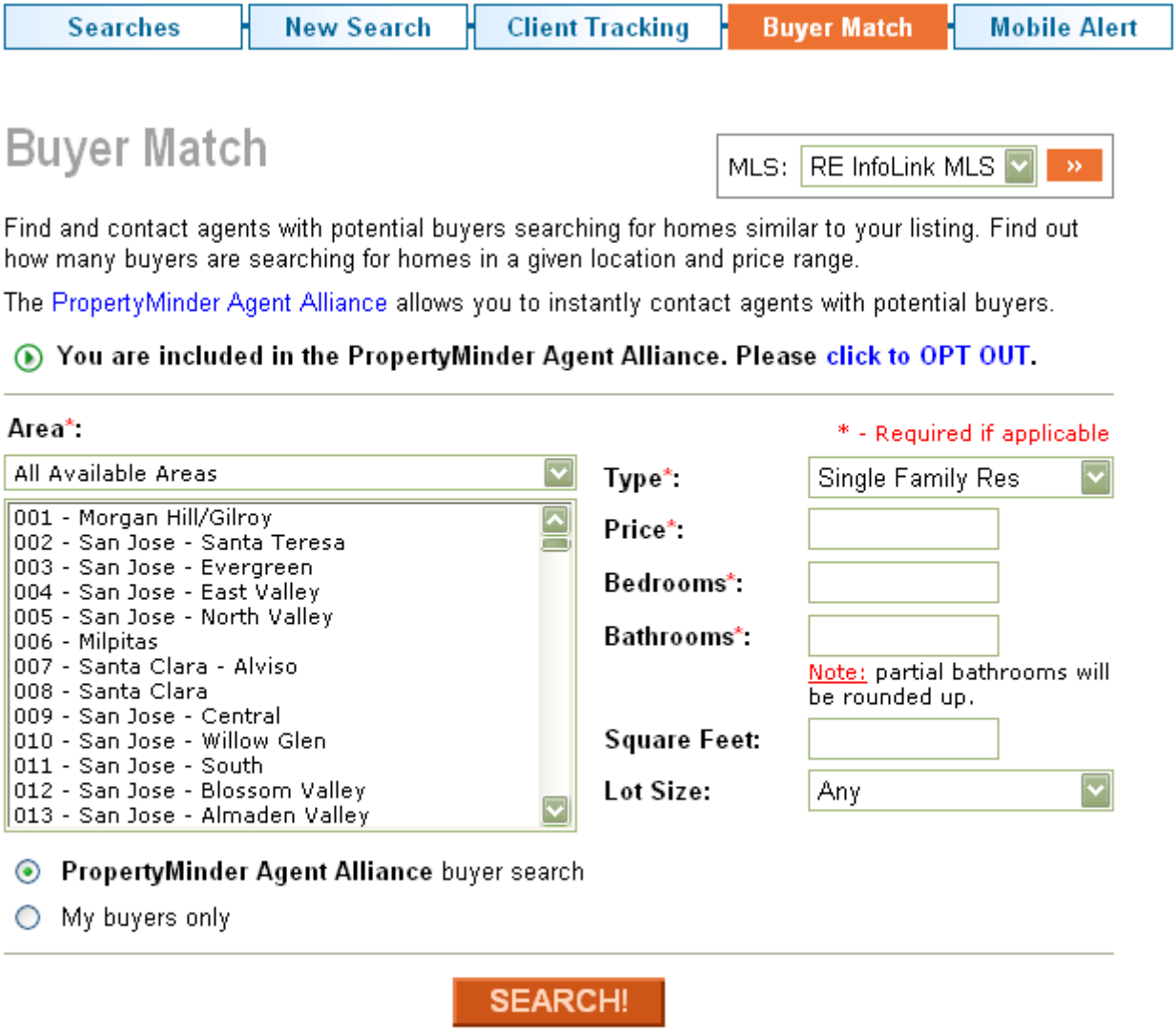
What is the Property Minder Agent Alliance?

As a PropertyMinder Agent Alliance member, you can extend your search for potential buyers beyond your office or geographic location, to all PropertyMinder Agent Alliance members. Instantly find potential buyers within the PropertyMinder Agent Alliance and announce your listing. Notify your buyers of hot new listings, sometimes even before they are listed.

How do I setup Buyer Match or Reverse Search?

The Buyer Match will allow you to send information about your to other agents in your area (who are also using PropertyMinder) to see if they have clients on their sites who are running searches that might match your listing(s). To setup a Buyer Match message:

1. Login to your **Admin Toolkit** and select **MLS Searches**.
2. Select the **Buyer Match** option.
3. The Buyer Match feature can only be used for one property at a time. It cannot be used to send multiple properties at one time.



4. Enter the **Area** of the property, **Price**, **Bedrooms** and **Bathrooms** and click **Search**.
5. You will see a list of all the Buyers found and a list of members of the PropertyMinder Alliance Agents. If you do not want to send your Buyer Match email to certain Realtors, you can uncheck their name and they will not receive the notification.

Buyer Match

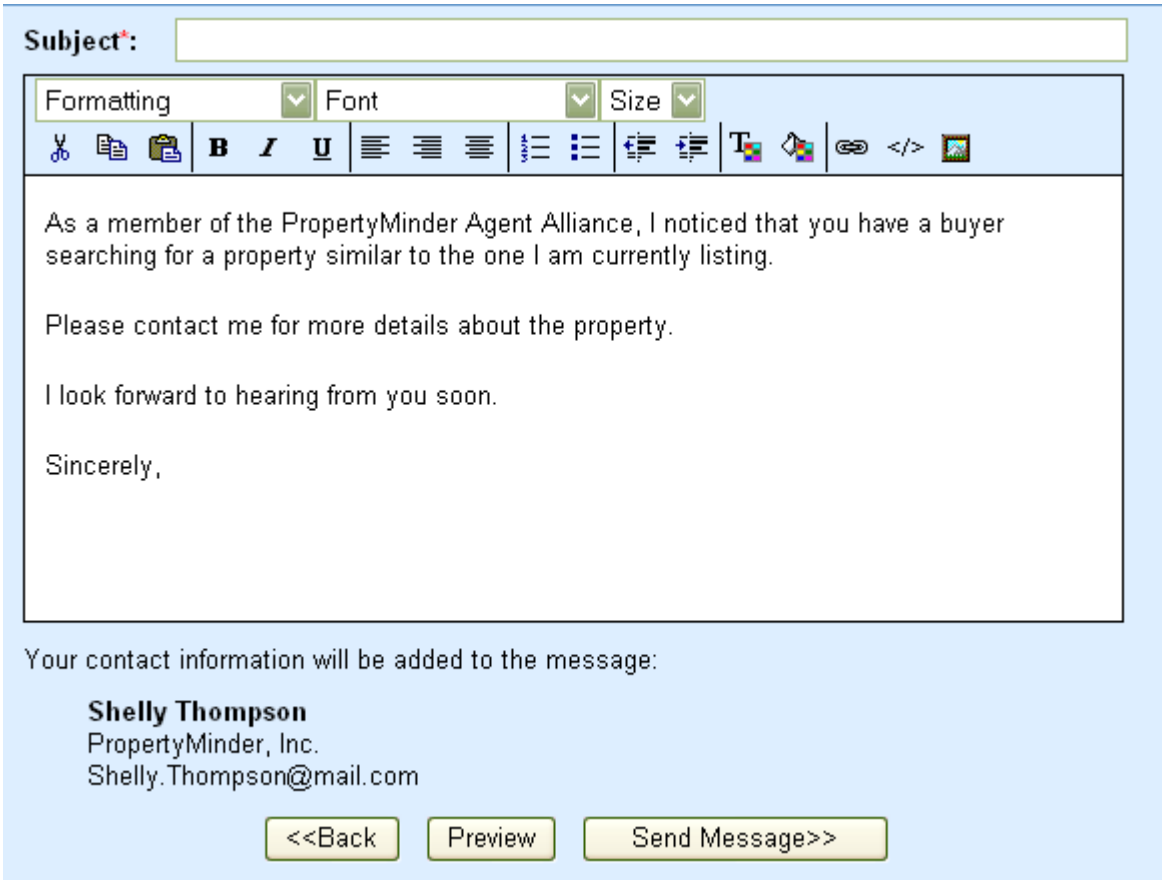
Go Back

Buyers found: **106**
PropertyMinder Alliance Agents with matching buyers: **39**

Select agents and instantly send a message.

	Agent	# of clients
☑	**Bonnie Rivkin**, Coldwell Banker Residential Brokerage	2
☑	**Kevin Curtin**, Coldwell Banker Residential Brokerage	2
☑	**Ellis Duncan**, Coldwell Banker Residential Brokerage	1
☑	**Team Victory**, Taylor Properties	1
☑	**Holly Woodworth Realtor®**, RE/MAX Allegiance	5
☑	**Gitte Cahoon Long**, Keller Williams Realty	10
☑	**Matt Ridgeway & Co, Realtors**, (800)621-7477 Anytime	1
☑	**Greg Doherty**, Coldwell Banker Residential Brokerage	5
☑	**Lemlem Embaie**, RE/MAX Allegiance	1

6. Enter a **Subject** for your Buyer Match email and update the body of the message to include any relevant information about the property.



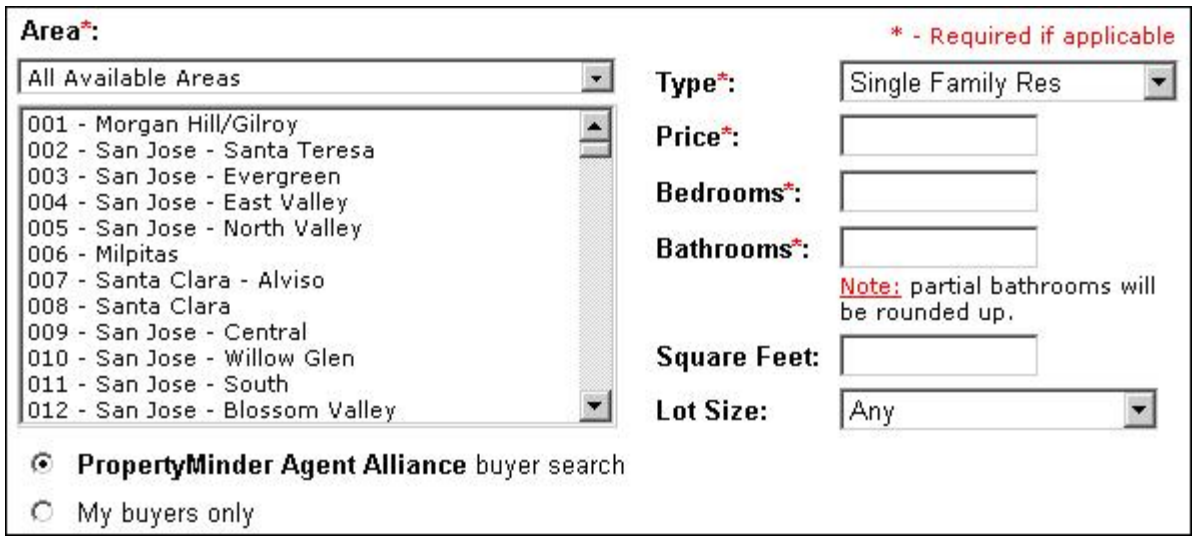
7. **Preview your message** before you send it to make sure that everything is correct.
8. When done, select **Send Message** to send your listing information to the other agents.

Will my clients contact information be provided to other agents?

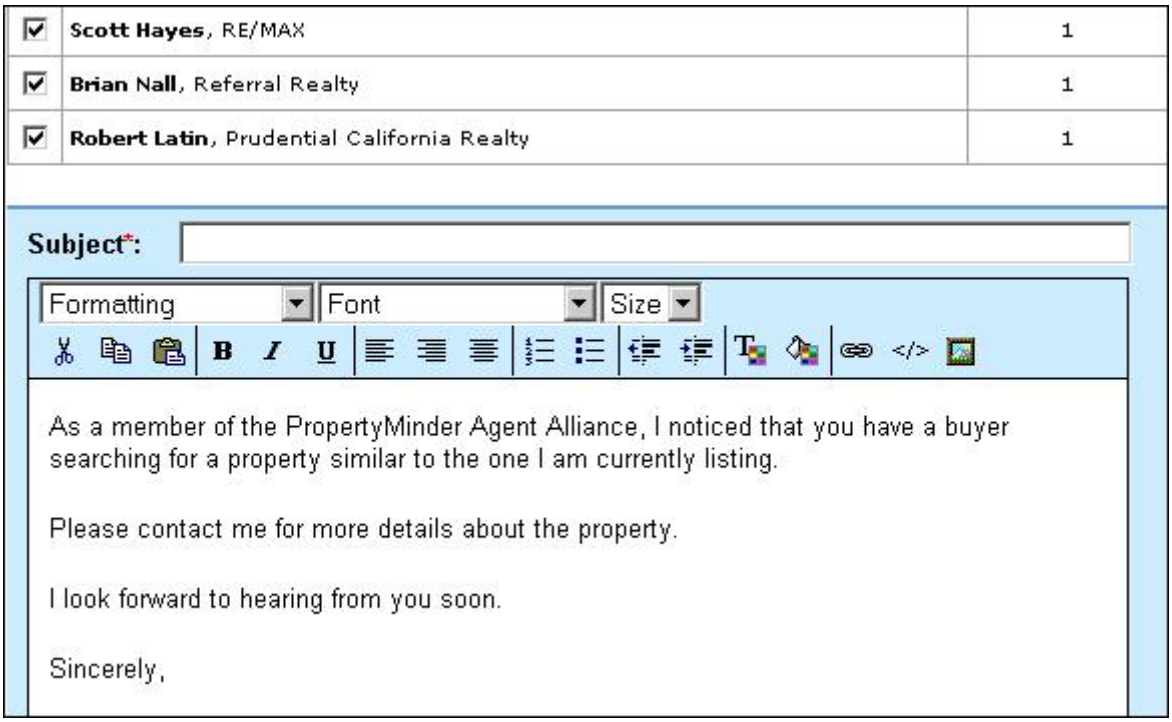
The name or contact information of your buyers is **NEVER** disclosed to other agents. If you opt out of the PropertyMinder Agent Alliance, you will only be able to search buyers from within your active searches.

How can I find potential buyers for a new listing?

1. Go to MLS Searches.
2. Click the **Buyer Match** button at the top of the page.



3. Enter the listing criteria to find buyers searching with similar criteria.
4. Select "Property Minder Agent Alliance" to search for agents who may have buyers searching for homes with similar criteria.
5. Select "My buyers only" to search buyers from within your active searches.
6. From the list, check the agents whom you want to contact and announce the listing to.



7. Use the email message template to word your listing announcement.
8. Click **Send Message** to email the message to all the selected agents.

What are custom IDX searches?

Some Realtors like to add a button or link to their websites that contains listings of a particular property type. Good examples include foreclosures or bank owned properties. Agents are able to automatically show a pre-populated page on their website that contains this information. Such pages may be created with the help of a custom IDX search.

How do I create custom IDX searches?

You can create customized IDX searches for specific types of properties. These searches are usually posted on your website as buttons or links.

1. Go to **MLS Searches**.
2. Click **New Search**.
3. Select the property type.
4. Fill out the form according to your criteria.
5. Click **Search MLS**.
6. Click on **Create Custom IDX** link on top.
7. Click **Create** on the verification page.
8. Once the link is created, you will not be able to modify the search criteria for your Custom IDX. Click **PREVIEW** to review your Custom IDX search. Click **CANCEL** to modify your search criteria.

If you click on PREVIEW, the search results will open in a new window. Be sure to disable your pop-up blocker.

9. You will then receive an email with the link to post on your website.
10. To add the link, you would need to go to **Website Editor**, then **Buttons**.
11. Click **Add new link** button and insert custom IDX link into the popped up window
12. Click Ok.
13. After the link appears in your list of buttons, click **Enable** to activate the page on your website.

Can I edit the results of custom IDX searches?

No, you cannot. When you create a custom IDX search, you only set up parameters for a queue to MLS database. When you populate this IDX link on your PropertyMinder website, the page is generated every time a user clicks on this page based on parameters you have entered.

Where and how do I use custom IDX searches?

You can post custom IDX link on your PropertyMinder website, use it as a hyperlink on any custom page or advertisement. Please note that PropertyMinder provides you with two custom IDX links which are used for different purposes. The first link (the short version) will ONLY work on your PropertyMinder website. The second link (the long version) may be used on any other pages or websites.

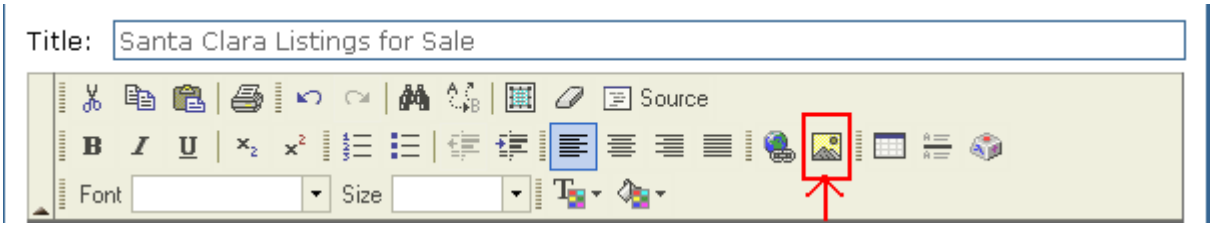
To put your custom IDX link on your PropertyMinder website:

1. After receiving the notification email with the custom idx links, login to your **Admin Toolkit**.
2. Click **Website Editor** and then **Buttons**.
3. Click **Add New Link**.
4. Copy IDX link from email (shorter link) and insert in the appropriate field of the popped up window.
5. Name the page and click Save.

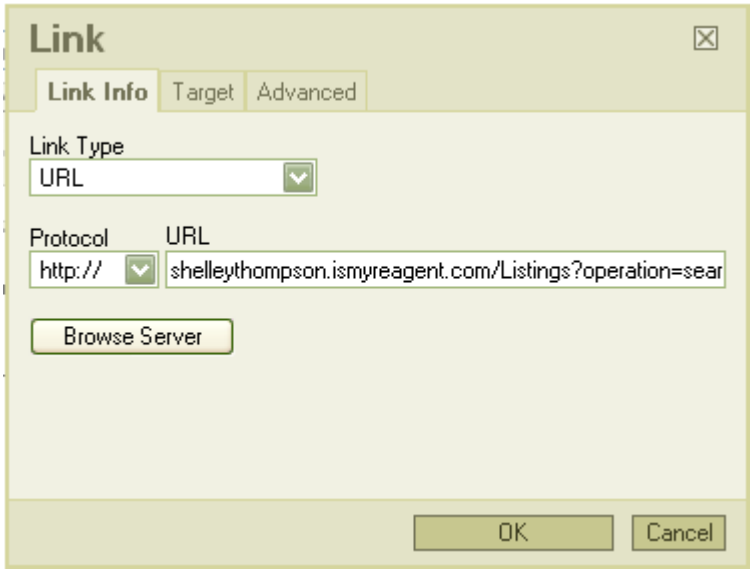
To put your custom IDX link on custom page:

1. After receiving the notification email with the custom idx links, login to your **Admin Toolkit**.
2. Click **Website Editor** and then **Buttons**

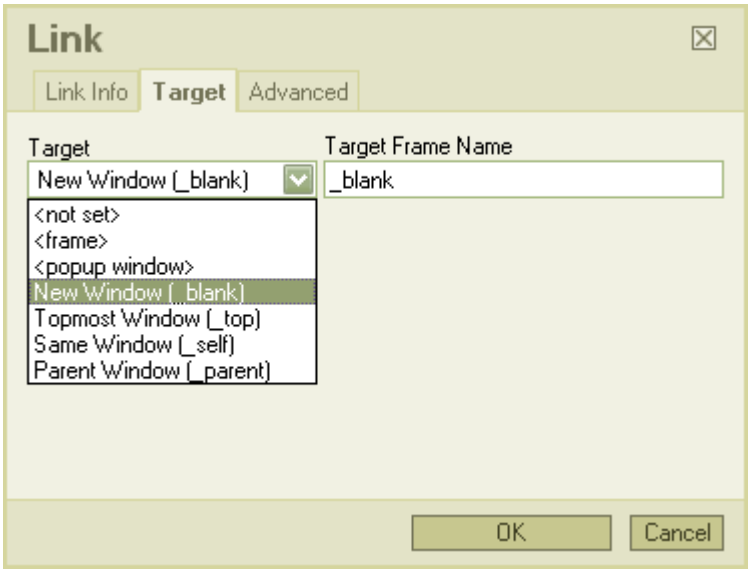
3. Click **Create custom page**.
4. Type in the title and text of your page.
5. Highlight the text that you want to hyperlink and click the Insert/Edit link icon.



6. Copy the IDX link from the email (longer link) and insert it in the pop up window.



7. Click on Target tab and chose how you would like the link to open (in the same window or new).



8. Click **Ok** and save your page. Do not forget to **enable** your custom page.

My custom IDX link is not working.

PropertyMinder provides you with two custom IDX links which are used for different purposes. The first link (the short version) will ONLY work on your PropertyMinder website. It will not work if you click on it. The second link (the long version) may be used on any other pages or websites. If you need assistance, please call Customer Support at 800-743-5820.

How can I change Email Notification settings for MLS Searches?

To change existing and setup new default settings for email notifications:

1. Go to **MLS Searches** on the **Admin Toolkit**.
2. On the first page, (On-Line Search Requests) click on **MLS Search Settings** link.
3. Uncheck Send Me an Email Notification option under New Listings Found Notifications Settings and also uncheck Send Me an Email Notification option under Price Change Notification Settings
4. **Important:** Make sure to also check Bulk Update Existing Searches before clicking Submit. Doing so will update all your existing searches with new settings.

After that all your new searches will be activated with notification settings OFF. Changing these settings does not affect your client's searches in any way.

Listings by Email

What is Listings by Email?

With the Listings by email tool, you can:

1. Send one particular listing by email to anybody from your Contact List, to all your contacts, to a selected group or to a new email address.
2. Send multiple listings by email to anybody from your Contact List, to all your contacts, to a selected group or to a new email address.
3. Send the complete information about the listing(s), including the listing agent(s) information, if you are sending the listing(s) to your agent network.
4. Add a customized message and format it with the available HTML editor. You can add links to the message that accompanies the listing.

How can I send a listing or multiple listings by email?

To send a listing or multiple listings by email:

1. Login to your **Admin Toolkit** and click **Listings by Email**.
2. Enter the MLS number or multiple comma-separated (,) MLS#.
3. Choose **agent view** or **client view** (select "agent view" if you are networking with other agents).
4. Enter the **Subject** of the message.
5. Choose **All contacts** if you would like to send the listing to the entire contact list. If you would like to send the listing to a specific group(s), choose **Contact groups** and then check the desired group(s). Choose **Contact List** and check the desired contact(s) in order from the list. Enter a new email address, or chose from the Contacts box. If you would like to send the listing to a new email address (or to add new email/s to the selected list of recipients), type new email(s) into the **Additional email(s)** field.
6. Add the message, format it and add links in through HTML editor.
7. Click the **Preview** button to review the message or the **Send** button to send the message.

What is the difference between "agent view" and "client view"?

When you choose "agent view", the complete information about the listing (including listing agent information) is displayed. "Client view" removes the listing agent's contact information and any agent-specific remarks.

Open Homes

How can I show Open Homes?

1. Go to **Open Homes** in your Admin Toolkit.
2. Enter the MLS number or multiple MLS numbers, then choose the day from the calendar and click **Add**.

3. Update the description and click **Save**.
4. To review the Open Homes, go to your website and click **Open Homes**.

How can I activate Open Homes on my website?

If you do not see the **Open Homes** button on the left panel on your website, please follow the steps below:

1. Go to the Website Editor on the left hand panel of your Toolkit.

2. Open the **Buttons** page.
3. Click Enable next to Open Houses page.

Remember to remove the open home from your website after the date of the event to prevent it from being repeated the next week.

Virtual Tours

What can I do with Virtual Tours?

PropertyMinder Virtual Tour Studio allows you to create your own virtual tours and slide shows for listings. Even inexpensive digital cameras are capable of creating quality images and moving panoramic presentations.

What do I need before I can create a Virtual Tour?

1. Get the best shots with your camera.
2. Prepare the images and load the pictures on your computer.

You can create 3 types of images for the virtual tour using your Digital camera software:

1. Still photos.
2. Single photo panorama.
3. Panorama 360° web panorama.

Requirements for panorama photos: Any Digital Camera with photo stitching software.

How can I start a new Virtual Tour?

To create a new virtual tour for your listing:

1. Login to your Toolkit and click Virtual Tours.
2. In your Virtual Tours Studio click on **Create New Tour** button.
3. You can preload the property information by MLS# or add it manually.
4. Make the necessary changes in the preloaded information.
5. Choose a color scheme for your Tour.
6. Click **Preview** and then **Save** the listing tour.

How can I design slides in a new Virtual Tour?

To design the slides:

1. Name the slide.

NOTE: The slide name will be the navigation link/button, which your clients will use. Make it short and understandable.

2. Upload the photo.
3. Select the appropriate radio button to mark the photo as: Still photo, Panorama, or 360° panorama.
4. Add transition effects to the slide and label the photo.
5. Write a concise description for this photo.
6. Click **Preview** and then **Save** the listing tour.
7. Create as many slides as you need.
8. Finally click Finish.

The Virtual Tour is now saved as a draft. All aspects of the draft like pictures, transition, labels, listing information etc can be modified as many times as you want, until your clients are satisfied with the presentation.

The draft can be viewed from your Agent Toolkit. A draft is completely editable. To make a Virtual Tour available on the Internet you need to publish it.

How can I edit a Virtual Tour draft?

All aspects of the tour draft are editable. Once a Virtual Tour is published the images cannot be modified and new slides cannot be added. Changes can be made to the general property information and the slide name, description, order, effect and label.

To edit a Virtual Tour:

1. Select the name of the draft or published tour that you want to edit.
2. Click the edit button at the bottom of the page.
3. On the screen that appears, you can edit the following information in the virtual tour depending on whether it is a draft or published tour:
    - General listing information, address and property specifications - can be edited for a draft and published tour.
    - Slide picture - can be edited only for a draft.
    - Slide name - can be edited for a draft and published tour.
    - Slide order - can be edited for a draft and published tour.
    - Slide transition - can be edited for a draft and published tour.
    - Virtual Tour stile (color schema) - Can be edited for a draft and published tour.
4. Click **Save** to save the changes.
5. Click **Finish** and then click the **Virtual Tour studio** button to return to the drafts page and preview the changes or in case of a published tour, to the **Tour Properties** page.

How can I publish the Virtual Tour?

1. Select the tour that you want to publish from the **Drafts** list.
2. Click the **Publish** button.
3. Read the terms and conditions before publishing the tour.
4. Preview the Full and Restricted versions of the virtual tour.
5. Click the **Agree to PUBLISH** button.

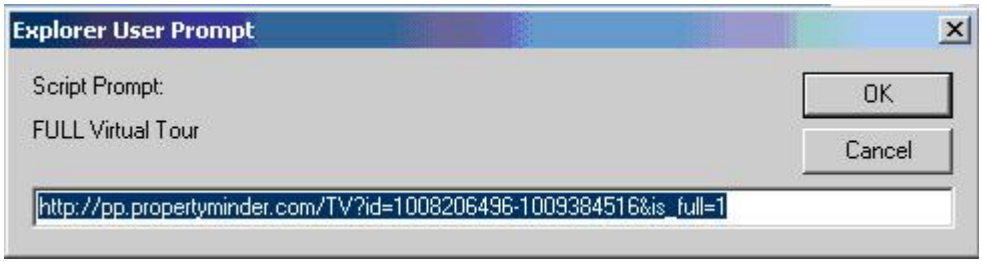
In the "Published Tours" screen, click **Tour Details**. The Published Tour displays two links:

Full Virtual Tour (includes your photo and contact information)

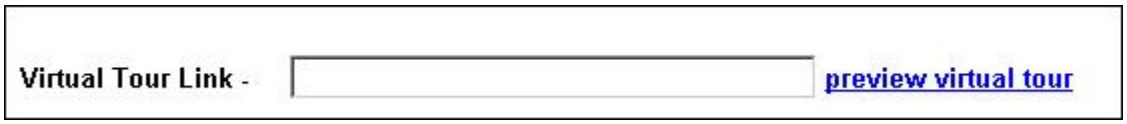
Restricted Virtual Tour (includes only property information)

How can I add the Virtual Tour to my website?

1. Click on the GET URL link. You will see a new window.



2. Highlight the link from dialog window, copy it and then add it to the particular listing by going to your Inventory Manager tool and clicking on update listing. You will see a special field for Virtual Tour Link on the listing details page, where you can paste the link to the published Virtual Tour.



3. You can also add the Virtual Tour link as a new button or link on your website using the Website Editor.

What is the difference between a Draft and a Published Tour?

The table below lists the differences between the purpose and functionality of Drafts and Published tours.

Drafts	Published Tours
A tour draft can be viewed only after logging in to the Agent Toolkit.	A published tour can be viewed by clicking on any of the two links listed in the *tour details* button.
All aspects of a draft can be modified, updated and edited.	Only certain aspects of a published tour can be modified or changed. Property Information can be modified, but new slides or pictures cannot be added once a virtual tour is published.
There is no charge to create a tour draft.	There is a charge of $19.95 to publish each tour. Agents with the Platinum package can publish the first 3 tours for free.

What is the difference between a full preview and a restricted preview?

A full preview brands your virtual tour by including your picture, name, website and contact information. A restricted preview of the virtual tour does not include your contact information and picture.

Most agents will hide Virtual Tours on the listings they send to their clients to block the listing agents information. By adding the restricted view link of the Virtual Tour on the MLS, you can prevent the virtual tour from being blocked, as it does not have your name, photo and contact information.

TOUR DRAFTS - To view the full preview/restricted preview of the draft, select the draft by clicking it and then click the **Full Preview/Restricted Preview** button at the bottom of the drafts section.

PUBLISHED TOUR - To get a full preview/restricted preview link of the published tour, select the published tour by clicking it and then click **Tour Details**. In the tour details page, click the **Get URL** link for the **Full Virtual Tour/Restricted Virtual Tour** and copy the link.

What is the charge to publish a tour?

You can create, customize, embellish and then publish a virtual tour for only $19.95. If you have the PropertyMinder PLATINUM package you can publish the first 3 tours for FREE. Any additional tours that are published will cost $19.95/tour and will be billed to your account.

Where can I advertise the published tour?

To Advertise the Virtual Tour:

- Post it on the MLS.
- Send it to any online advertising site.
- Add it to your website.
- Email it to your prospects or colleagues.

Comparable Market Analysis

What is the purpose of CMA (Comparable Market Analysis) tool?

This feature is meant for sellers/listing agents. It allows you to complete a Home Evaluation Request in the Admin Toolkit and send the report via email to your prospective client or print it for a listing appointment. The report will contain comparable active/pending/sold properties usually in a close proximity & similar criteria as the home seller's house.

How can I create Home Evaluation Report for my client?

To create Home Evaluation Report:

1. Login to your **Admin Toolkit**.
2. Click on the **Comparable Market Analysis** icon.
3. Click "**Create new CMA**"
4. **Step 1**. Name your report in the "**Title**" field and assign it to a contact from your contact list. Enter the subject property information. Press the "**Import from MLS**" button and type the MLS number to load listing details from MLS or click the "**Input new address**" button to type property details manually. Then press "**Create**" button and go to the next step.
5. **Step2**. Enter search criteria for your comparable properties search and press the "**Find Comparables**" button. Check off the properties from search results, which you would like to include in your report and go to the next step.
6. **Step 3**. View the selected properties. Click on the "**Detailed view**" link below the map to see more details and photos. If you would like to exclude some property from your report, choose Simple view and click on its address. Then click "**remove from chosen**" on the top-left corner of property details window.
7. **Step 4**. Edit the text of the pre-written marketing plan. You might want to replace it with your own marketing plan or just add some personal hints. Use check-boxes to choose the sheets to include in your report. Click on the "**Next: Generate Report**" button when you finish.
8. **Step 5**. Generate and send the report. Set the recommended price or price range first using "**Set Price"** and "**Set Price Range**" buttons. Check off the option "**Make available for client on my site**" and your client will be able to access this report from his client corner. Click on the "**Generate PDF Report**" button to preview your report in PDF format, print or save it. Return to the previous step and make some editing if needed. Click on the "**Preview / Send to Client**" button to preview your report in HTML format and send the PDF-version to the selected contact.
9. You can return to any step at any time by clicking on its name on the upper navigation bar.

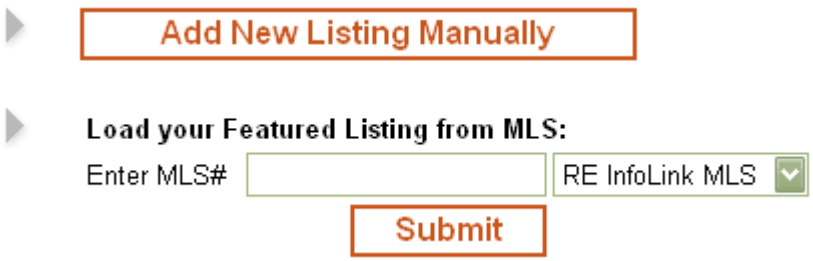
Inventory Manager

What can I do with Inventory Manager?

The PropertyMinder system uploads your featured and office listings automatically.

10. Add listings and properties that you may not have put on the MLS (pocket listings, exclusives, rentals etc) to the "Featured Listings" page on your website. You may even want to add homes you have sold in the past.
11. Load your featured listing from the MLS.
12. Update (edit) listing information.
13. Create the photo album - add more photos to your featured listing. Sort the listing photos.
14. Add a virtual tour, if applicable.
15. Add any custom link to your featured listing. This feature is used to provide title reports, disclosures, etc online.
16. Hide/show address and map of the property.
17. Hide/show the hit counter tracking the number of people who viewed your featured listing.

How can I add a Listing/Property manually to the website?



1. Go to **Inventory Manager**.
2. Click on the **Add New Listing Manually** button.
3. Add a Photo to a Listing/Property.
4. Click on the **Browse** button to locate the image on your computer.
5. Locate the file/directory.
6. Double click on the file you want to use. If you can't see your file above, try changing the Files of type: to All Files (*.*).
7. Click on the **Upload Photo** button.
8. Add more photos.
9. Add "Virtual Tour Link" to a Listing/Property. Name the link and paste the web address (URL).
10. You can add the custom link that will show Disclosers, specific area reports or anything you want. Name the link and put web address (URL).
11. Add General Information (the required fields are marked in red).
12. Type an attention grabbing description for the property in the "Description" field.
13. Add "Property Features". You may check as many features as you want.
14. Click on the **Submit** button to add the new Listing/Property to your personal website.

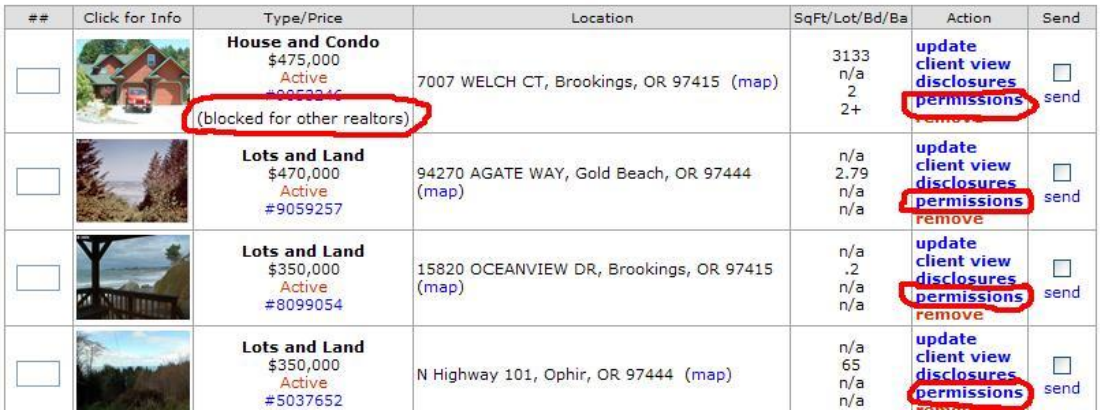
How can I load the Listing from MLS?

1. Go to the **Inventory Manager**.
2. Type in the MLS number in the Load your Featured Listing from MLS" input box.
3. Click **Submit**.

How do I block other PropertyMinder users from listing my properties?

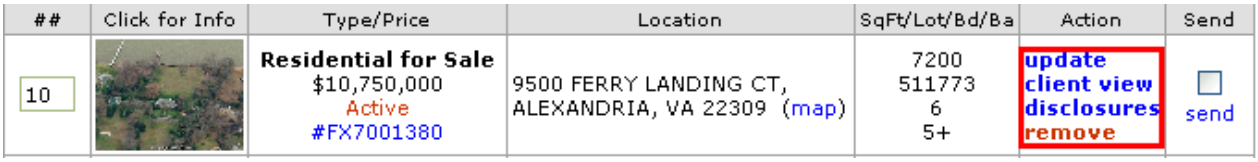
You can block listings from appearing on other PropertyMinder subscribers' websites.

1. Go to the Inventory Manager.
2. Next to the listing, click Permissions.
3. On the Edit Listing Permissions page, select your option. If you select to block the listing from other PropertyMinder users, they cannot add it onto their websites. Furthermore, if this listing is already added onto their site, it will get deleted.



##	Click for Info	Type/Price	Location	SqFt/Lot/Bd/Ba	Action	Send
		House and Condo $475,000 Active (blocked for other realtors)	7007 WELCH CT, Brookings, OR 97415 (map)	3133 n/a 2 2+	update client view disclosures permissions	send
		Lots and Land $470,000 Active #9059257	94270 AGATE WAY, Gold Beach, OR 97444 (map)	n/a 2.79 n/a n/a	update client view disclosures permissions remove	send
		Lots and Land $350,000 Active #8099054	15820 OCEANVIEW DR, Brookings, OR 97415 (map)	n/a .2 n/a n/a	update client view disclosures permissions remove	send
		Lots and Land $350,000 Active #5037652	N Highway 101, Ophir, OR 97444 (map)	n/a 65 n/a n/a	update client view disclosures permissions	send

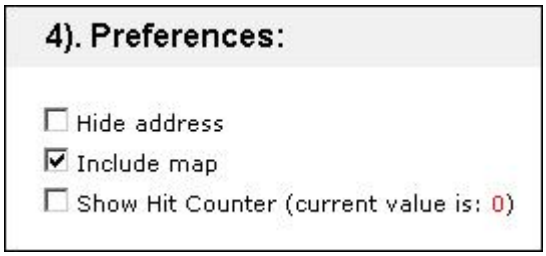
How can I update a Listing extracted from the MLS?



##	Click for Info	Type/Price	Location	SqFt/Lot/Bd/Ba	Action	Send
10		**Residential for Sale** $10,750,000 Active #FX7001380	9500 FERRY LANDING CT, ALEXANDRIA, VA 22309 (map)	7200 511773 6 5+	update client view disclosures remove	send

To Update listing information click on the Update link on right side of the Listing table. You can make the following changes to listings that have been extracted from the MLS either automatically, or that have been loaded from the MLS:

1. Change/update the main picture.
2. Add additional photos: create a photo album by clicking the photo album: link.
3. Add/update the virtual tour link.
4. Add a custom link for the listing.
5. Modify the description of the listing using the HTML editor, which allows you to add links and format the description.
6. Select hide address, include map, or show the hit counter.



7. Click **Submit** to save changes.

How can I remove a listing from the Inventory Manager?

To Remove a Property from the Listing table click on the Remove link on right side of the Listing table.

WARNING! All "Removed" listings are permanently removed.

How can I prepare a Listing/Property photo for the web?

1. We recommend that you start by creating a file/directory on your computer called "My Listings".
2. Save ALL your images in this file/directory so that they will be easily accessible when you are ready to upload them to your website.
3. Before you can add photos to the website, please prepare and save them in the proper format:
4. **Dimension:**
    - 320 pixels (4.444") - WIDTH
    - 240 pixels (3.333") - HEIGHT
5. **Resolution:** 72 dpi (dots per inch)
6. **File Type:** JPEG (jpg)

You can change the size of the picture yourself using the Paint (Microsoft Windows Paint) application. If you have a relatively new version of windows you should have it on your computer. Windows 2000, ME and XP have it.

To change the size of the picture yourself:

1. On the bottom left corner of your screen, go to **Start > Programs > Accessories > Paint.**
2. The paint application will open on your screen.
3. In Paint, click on **File** and select **Open**.
4. In the **Open** dialog box change the value for **"Files of Type"** to JPEG (or the type of file that you have, it might be Bitmap, GIF, JPG). If you do not have this option for "Files of Type" then your windows is too old.
5. Navigate to the place on file system where the file is saved and open it. You should see your picture occupying a large portion of the screen.
6. Click on Image (menu item) and select **Stretch/Skew...**
7. On the opened dialog box change Stretch values to be less than 100%. We suggest that you start with 50% and then change it if needed.

NOTE: Till you save the file, nothing will be changed, so you can experiment with it. Try to get your picture to the size when it is about the size you would like to see on your website.

8. Use **"Save As:"** (Under File menu) instead of **Save**. Using **"Save As:"** will keep your original picture unchanged but will create a new file of a smaller size.

NOTE: Make sure that the "Save as type" box shows the file type as JPEG. Select a name for it and save it.

How can I create a photo album (add multiple pictures)?

1. Click the update link corresponding to the desired property.
2. Click the **photo album...** link on the property editor.
3. On the Photo Album screen, click the browse button to find and select the file with the picture image.
4. Label the image (description of the image).
5. Click the "Upload picture and description" button.
6. Repeat these steps as many times as required.

How can I change the order of my Featured Listings?

1. Go to the **Inventory Manager**.
2. Use the first blank field (##) to order the listings in increments of 10.
3. Click the save listings order (##) link above or below listings table.

How do I post my listings to Craiglist?

With PropertyMinder's AccelerAd, you can easily post your listings on Craigslist. This will help your listing and website gain more visibility online. If you are new to Craigslist, we recommend creating your own free account at https://accounts.craigslist.org. All of your Craigslist posts will be saved under this account, so that you can keep track of them in one place. Please visit http://www.craigslist.org/about/terms.of.use and see Craigslist's Terms of Use for information about posting advertisements on Craigslist.

To post your listing to Craigslist:

1. Login to your **Admin Toolkit** and go to **Inventory Manager**.
2. Next to the listing, click **Post to Craiglist**.

##	Click for Info	Type/Price	Location	SqFt/Lot /Bd/Ba	Action	Send
10		**Single Family Res** $725,000 Active #81006039	908 WILLOWSHIRE WY, San Jose, CA 95125 (map)	1994 2,613.sf 4 2.5	**update** **client view** **disclosures** **remove**	☐ send
20		**Single Family Res** $699,950 Active #81006043	1163 CURTISS AV, San Jose, CA 95125 (map)	1449 3,920.sf 3 2	**update** **client view** **disclosures** **remove**	☐ send
30		**Single Family Res** $299,900 Pending w/release #81000653	692 N 15TH ST, San Jose, CA 95112 (map)	1052 4,140.sf 2 2	**update** **client view** **disclosures** **permissions** **remove** **post to craigslist**	☐ send
40		**Multiple Res Units** $775,000 Active #80953847	2543 SKYLARK DR, San Jose, CA 95125 (map)	2413 9,044.sf n/a n/a	**update** **client view** **disclosures** **permissions** **remove** **post to craigslist**	☐ send

3. Enter your Craigslist email login.
4. Choose the Area/City. Always double check the City/Area that the post is being entered under. For some larger metropolitan areas such as SF Bay Area CA and Los Angeles CA, Craigslist has split up these areas into smaller markets. Make sure that you choose the correct one.
5. After selecting the correct city/area, pressing **Submit** will direct you to the Craigslist post area. You will see the Craigslist advertisement as potential buyers would see it. All the information regarding the property will be pulled automatically. Review the ad and if ready, press **Continue** and follow the prompts to finish the posting. If you want to make changes to your ad (for example, create an attractive title), use the **Edit** button.
6. To see how many visitors/hits were received from your AccelerAds, visit the **Hits Tracking** area in the Admin Toolkit. Our tracking tool will let you know how many visitors came to your website and which website they found you through. After clicking on **Hits Tracking**, click on the **Search Engines/Referrers** tab, then **All Referring Sites**.

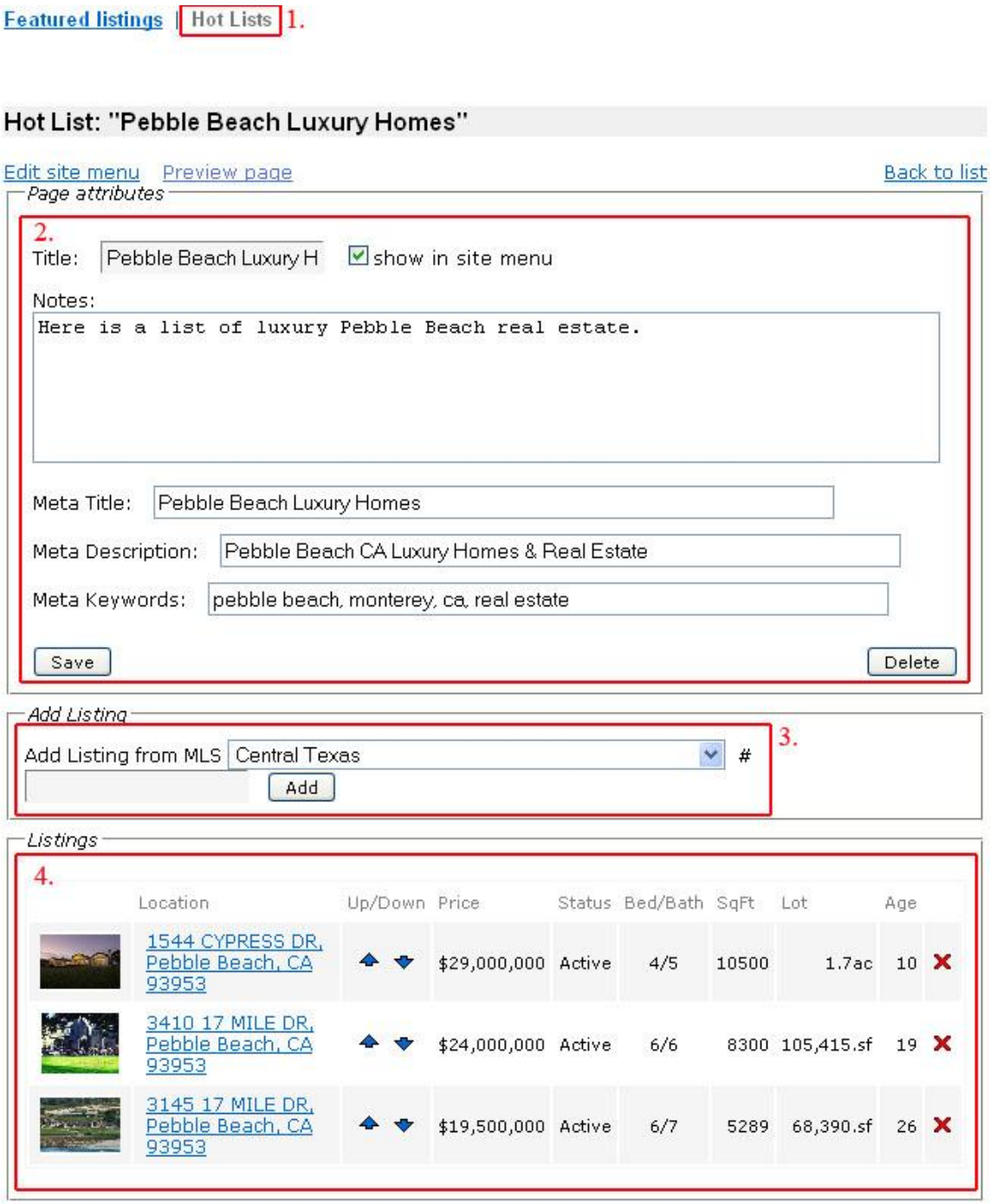
How can I create different lists of properties?

You can create different lists of properties and put them on specific pages of your website. Just pick the MLS property ID #'s or import the properties from your Featured Listings, name the page, and you will quickly have pages dedicated to different niches.

Hint: make pages for luxury homes, REOs, short sales, rentals.

To create your list of properties:

5. Login to your **Admin Toolkit** and go to the **Inventory Manager**.
6. Click on **Hot Lists** near the top.
7. Click on **New Group**.
8. See image below for editable fields.



- Add **Title** to the Hot List - This will be the same text that shows up on the actual page of listings.
- **Notes** field - Add a sentence or two regarding the list. Maybe it's a list for REOs, luxury homes, listings in a certain neighborhood, etc.

Meta Title: Title for the page which will show up on the browser/search engine results page.
Meta Description: A sentence about the page that is viewable on the search engine results page.
Meta Keywords: words that a person would type into the search engine fields.

- Add Listing: Enter the MLS property id # and press **Add**, for some agents, pick the MLS for that property. You can also add any of your Featured Listings to the page. Click the "**Start Import**" button under **"Add Featured Listings"** and check off the properties you would like to add.
- Sort the order of the listing or delete it from the list.

After adding the listings, you can preview the page. Make sure to select "**Show in Site Menu**" to have it activated on the website. "**Edit Site Menu**" will take you to the menu for editing the order of the page on the navigation bar.

What is a disclosure package?

These are documents such as existing contracts, government forms, various inspection reports, lists of exceptions (e.g. lack of permit, violations, etc.), liens and more that pertains to the property for sale. They are mostly in pdf formats when hosted online as they are considered as protected documents. The listing agent has the authority to permit access to an individual.

How can I add disclosure documents to the listing?

1. Login to your **Admin Toolkit**.
2. Click **Inventory Manager**.
3. Find the listing and click on the disclosures link under the Action column.

4. On the next page, click Browse and upload your document. You may also write notes or description for the document. If you wish to sort the documents, just put a number in the beginning of the file name (e.g. 1xyzpropertyfloorplan, 2xyzpropertyinspection).

5. After clicking the Upload button, you will see a system notice. By default, all your documents are protected. You may also make them public by checking the appropriate checkbox as shown below.

6. When some one tries to download a disclosure document and you chose to protect your documents as shown in the example above, your site visitor is forced to leave an email. You will receive a notification email with this visitor's information. If you decide to grant the access, click on the Permit link. You will be directed to login to your Toolkit and you'll see a permission

page where you can see the visitor's information. Same directions apply if you deny the document access.

How can I grant document access to my client without checking my email notification?

1. Login to your **Admin Toolkit**. Click **Inventory Manager**.
2. Look for your listing. Click on **Disclosures** link under the Action column.
3. Click on **Permitted** link.
4. In the drop down menu, chose the client and click Permit. You may also notify your client by clicking the checkbox Notify client.

How can I deny access to these documents without checking my email notification?

1. Login to your **Admin Toolkit**. Click **Inventory Manager**.
2. Look for your listing. Click on **Disclosures** link under the Action column.
3. Click on **Denied** link.
4. In the drop down menu, chose the client and click Deny. You may also notify your client by clicking the checkbox Notify client.

How can I see who downloaded my disclosure documents?

1. Login to your **Admin Toolkit**. Click **Inventory Manager**.
2. Look for your listing. Click on **Disclosures** link under the Action column.
3. Click on **Download Logs** link to see who downloaded your documents.

Transaction Progress Report

What is Transaction Progress Report?

Your "Transaction Progress Report" tool allows you to provide information to your clients about important events, appointments and deadlines regarding the transaction. This information is provided in two ways: first, in the client private area of your website with an access-code-protected login that can be accessed 24 hours a day and seven days a week. And second, an e-mail reminder that is sent out every time you update the report, or want to send a note to your clients showing the work you are doing for them.

The information you include in your reports is permanently logged and is available for you and your clients 24/7 even after closing. If you are a Microsoft Outlook user, your calendar will be automatically updated and send you alerts/reminders 24 hours before the deadline or event is due.

How can I create a Transaction Progress Report for my clients?

1. Go to Transaction Progress Report on your toolkit.
2. There are 2 ways of creating a new Transaction Progress Report:
   - You can setup a contact first and then create a new Transaction Progress Report.
   - You can assign a new Transaction Progress Report to an existing contact.
3. Fill in the Listing/Purchasing Property Address (the required fields are marked in red).
4. Enter the Escrow Information (Escrow Closing date, Escrow Number, Escrow Officer name and phone).
5. As the section on "Escrow Information" may not be applicable to your area, we have included a section on "Closing Information" to accurately reflect transaction details like contract acceptance date, scheduled closing date, and the name and phone number for the buyer's, seller's and lender's attorney.
6. Remind your client about important dates and transaction deadlines.
7. Inform your client about scheduled Inspections (Property, Termite, and Roof).
8. Provide additional information to be sent to your client in the **text box** (You can enter notes to your client. These notes will be kept in the progress report, so you may find it useful to date them and use them as a "log" of events.)
9. Click **Send** to email the Report to your client. Your client will receive an email with the information you've entered along with the link to your ("Client Login" section) and the Login Information.
10. Before you send the Report you can click **Preview** to see how the Report will be shown on the client area on your site.

ATTENTION. Make sure to return Back to Report Generator and click Send to submit the Report to your client.

11. When you click **Send,** you will get a "Thank you" screen with the client's login information.

How can I update a Transaction Progress Report?

1. Go to Transaction Progress Report.
2. To update the Transaction Progress Report you can select the address from the list (press radio button) and then click **Continue**.
3. Update the Transaction Progress Report.

4. Click **Send** to submit the Report to your client.
5. Before you send the Report, click **Preview** to see how the Report will be shown on your website.

ATTENTION. Make sure to return Back to Report Generator and click Send to email the Report to your client.

How can I archive a Transaction Progress Report?

1. Go to the Transaction Progress Report.
2. Click the archive link on the right side of the address.
3. You can view the archived Transaction Progress Report from the client's profile.

Where can my clients view the transaction progress report that I created for them?

1. When you send the Transaction Progress Report to your clients, they receive it by email. This email includes the Report, the link to the client's login area on your site.
2. The Login protects the privacy of your client's transaction information.

Home Care Center

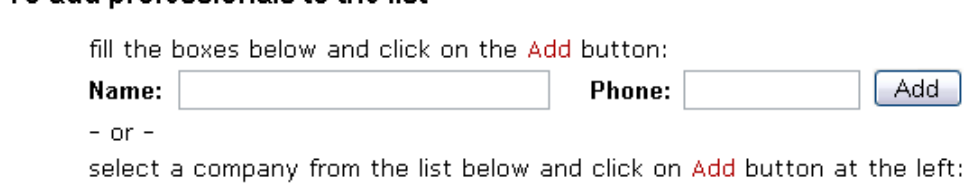
What can I do with Home Care Center?

The Home Care Services tool allows you to manage your custom vendor list and respond to requests from clients and prospects for Home Care Professionals.

Once your custom lists are set-up, the service will automatically respond to your visitor's requests, save you time, satisfy your clients and prospects and even generate new leads. Clients or prospects will make requests for advice from your website, then you can offer them either your own list of professionals, or PropertyMinder pre-qualified professionals. If the request comes from a prospect, you will now have that prospect's contact information, and a reason to follow up with him or her ("Thank you for using my service etc").

How can I respond to my client's request?

1. Click **Home Care Center**.
2. Select the category of services you want to refer.
3. Select the sub-category if needed.
4. To add your favorite professional to your Custom Referral List, fill in the company name and phone number and click **Add**.
5. After you have created your Custom Referral List, click **Send to your client**.



6. Fill in your client's name and email address. Click **Continue**.
7. Review the text of the email message that will be sent to your client along with the professionals you have selected.
8. You may send the email as is, or modify the standard template and insert your own text. The standard template is available each time you send a referral.
9. Click **Send** if you are satisfied and want to send the message to your client.
10. Your clients will receive emails with links to take them to the contractor or vendor profiles.

How can I get requests for Home Care Advice from my website visitors?

You have an online **Home Care Center** lead form on your website.

You will receive email with the client name, email address and problem description.

The contact information is automatically added to your CRM as a Captured Visitor.

Office Solution

How can I edit my company information on the website?

1. Click the **Administration** button on the left screen of your Toolkit.
2. Enter the relevant company information in the Administration page.

What can I do with the Agent Roster?

In the agent roster, you can:

1. Manage the agent contact information and profile displayed on your website.
2. Add new agent profiles to your office website.
3. Add additional office locations and associated agents to your website.

How can I add new agents?

1. Click the Agent Roster.
2. On the Agent Roster page, click the **Add Agent** button.
3. Enter the relevant information about the agent including:
    - Agent Name
    - Title
    - Contact Information
    - Email
    - MLS Information (Agent ID/DRE number)
    - Photo
    - Web page address
    - Slogan, Biography and additional statements
4. Click **Save** to save changes.

How can I edit, view and delete existing agent profiles on my office website?

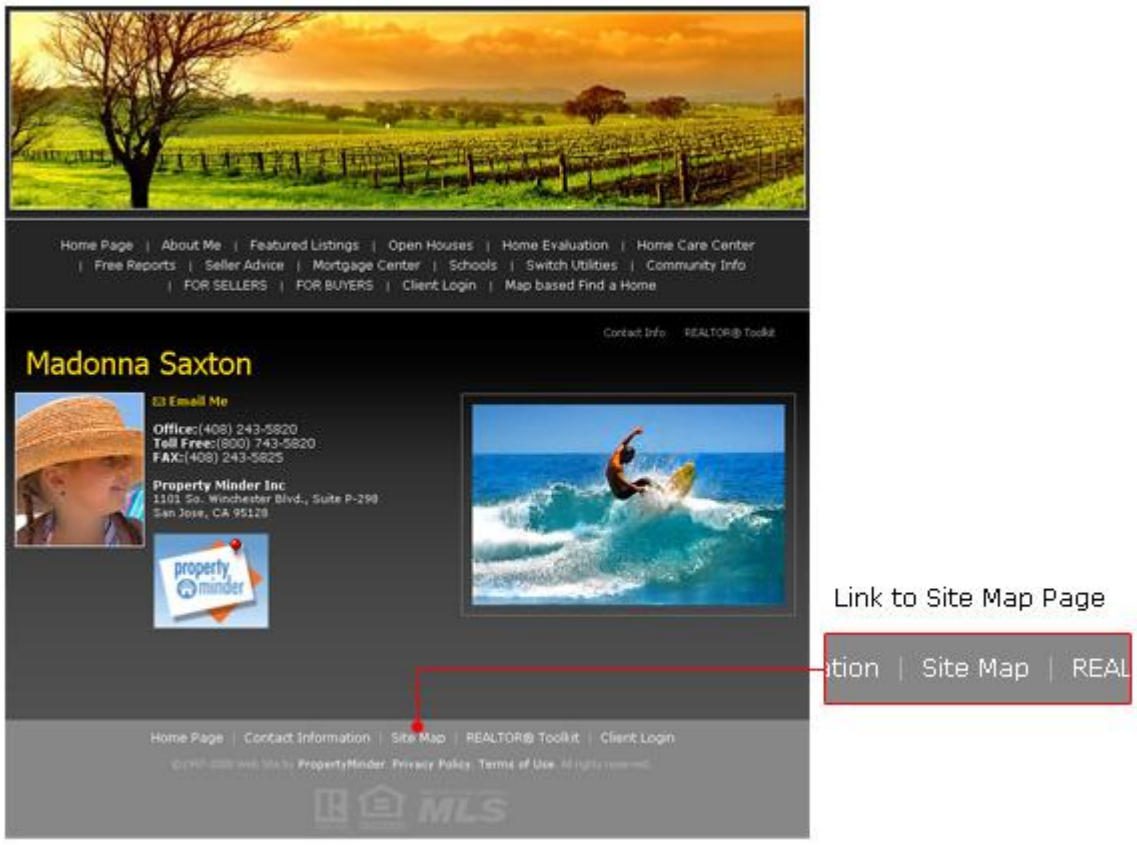
1. Click the Agent Roster.
2. On the Agent Roster page, use the action links (view, edit or delete) corresponding to the particular agents name.

How can I add a new office and create its profile on my office website?

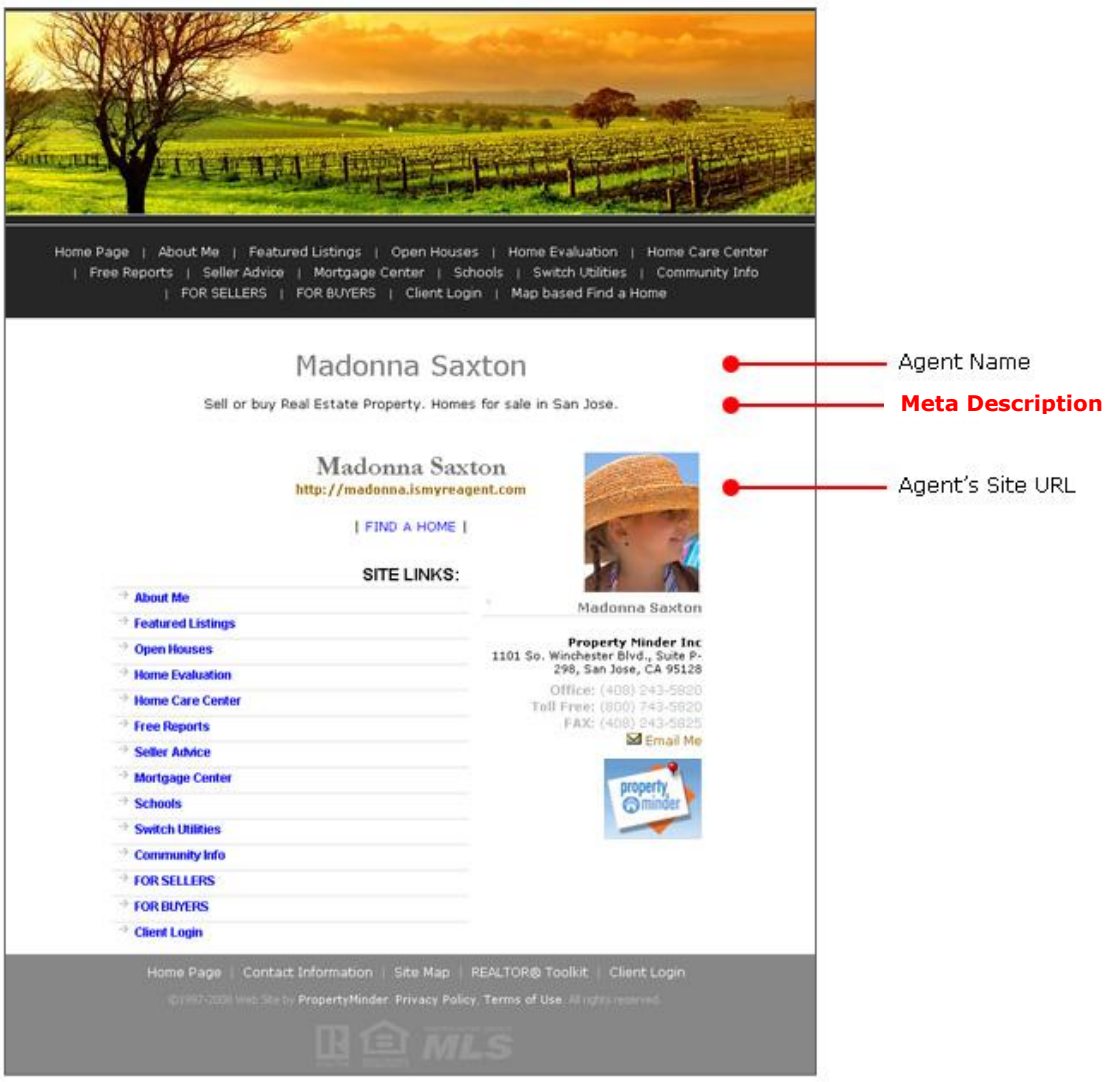
1. Click on the "Agent Roster".
2. On the **Agent Roster** page, click the Add Office button.
3. Enter the relevant information about the agent including:
    - Office Name
    - Contact Information
    - Office Address
    - Areas served by the office
    - MLS Information (Office Broker Code)
4. Click the **Save** button to save changes.

Website SiteMap

The sitemap page is submitted to major search engines. The site map page helps the search engine index your page in the correct category. Sitemap is an important consideration for someone who is interested in search engine optimization to increase the natural ranking of the site in search engines.



The site map page displays the Slogan, agent/office name, web-site URL, list of web-site pages (links), agent contact information and agent profile. This information effectively helps the search engine categorize your website into the appropriate category by location and services.



Website Lead Capture Forms

Your website is designed to intelligently capture leads. Search forms and report request provide visitors valuable information in exchange for their email address. Multiple lead capture forms on your website are intended to entice visitors and capture visitor information. All captured visitors are automatically added to your **Contact List** in the Client Relationship Management (CRM). You can view the captured visitors within the "CRM" tool (Client Relationship Management) or on the "Website Statistics" tool.

Some of these forms are listed below:

Lead Auto Capture (with auto respondent)
MLS Search Request Form (with email authentication)
IDX (Instant MLS Search Request form)
Comparative Market Evaluation Form (CMA)
Report Library for Sellers
Report Library for Buyers
Free Reports Request Form
Home Care Center Request Form
Virtual Tour

In addition to the standard forms, you can create custom pages on your website with the goal capturing visitor information in exchange for relevant content and reports.

- **Lead Auto Capture**

The lead auto capture window appears when a new visitor comes to your website. It prompts website visitors to click **OK**, in order to receive monthly market updates or other promotions. Captured visitors are automatically added to you CRM and receive a welcome message introducing the different features on your website. You can customize the text on the lead capture window to display free offers or promotions. Then you can customize the welcome message to offer promotions, free reports or e-coupons.

- **MLS Search Request Form**

Visitors to your website can search properties using the "Find a Home" button on the left panel. The search request form captures the email address of the client. The email address is verified by the system before the client can view the search results. The search form also enables you to determine which location and price range the new visitor is searching in.

- **IDX - Instant MLS Search Request Form**

Visitors to your website can instantly search properties using the IDX (Internet Data Exchange) program. PropertyMinder extends the IDX feature to help agents capture leads and offer buyers a way to save searches and receive periodic updates on new listings. When the search results are displayed, the visitors can choose to save the search results or receive free home updates by email. The visitor's email address is then authenticated by the system. The search form also enables you to determine which location and price range the new visitor is searching in.

- **Comparative Market Analysis Form**

The "Home Evaluation" button on the left panel of the website allows visitors to request a CMA (comparative market analysis). The home evaluation request form captures the visitor's email and it also asks the visitor to choose, if they are working with a real estate agent and also the reason for requesting a market analysis.

- **Report Library for Sellers and Buyers**

PropertyMinder Office, Platinum and Silver package websites contain a "FOR SELLERS" and a "FOR BUYERS" button. These buttons link to a page with different content rich reports for buyers and sellers. After viewing a brief introduction about the report, clients can request the report by submitting their email address. This is an effective way to capture new leads on your website by providing relevant checklists and reports for buyers and sellers.

- **Free Reports Request Form**

The "Free Reports" Request page allows visitors to request basic reports like homebuyer tips, marketing checklist for sellers etc. The reports are automatically emailed to the visitor and the email address submitted by the visitor is added to your contact list.

- **Home Care Center Request Form**

The "Home Care Center" form allows visitors to request a list of home contractors in a specific category. The visitor submits their email and automatically receives a referral list of contractors that you have added to the specific category in the Home Care Center tool on your **Admin Toolkit**.

- **Virtual Tour**

All virtual tours created with PropertyMinder, include the "FIND OUT MORE" lead capture form. Any contact information entered to request more information on the Virtual Tours is captured and automatically added to your contact list (CRM).

- **Your Own Custom Lead Form**

You may create your own forms to capture your website visitor's information. Some examples include: registering for an event that you are holding, compiling an email database for your monthly eNewsletter, CMA, sending a free report on current market trends and more.

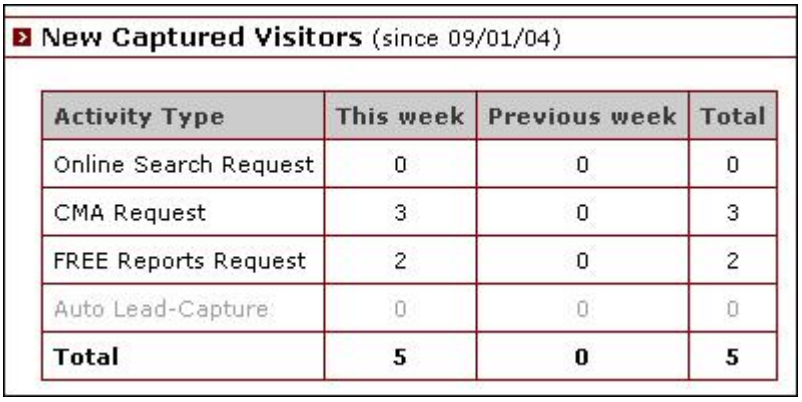
Any contact information entered is captured and automatically added to your contact list (CRM).

Checking Captured Visitors Information

You may find the details of your newly captured visitor by logging into your Toolkit and clicking on Client Relationship Management. The very first page is your Captured Visitors page. Click on the person's name to find very detailed history information: which website gave you the traffic, what was requested on your website along with the contact information

Captured Visitors Statistics

You can view the **Website Statistics** page to determine what brought the **Captured Visitors** to your website. Click the "Website Statistics" button on the left panel of your **Admin Toolkit**.



New Captured Visitors (since 09/01/04)

Activity Type	This week	Previous week	Total
Online Search Request	0	0	0
CMA Request	3	0	3
FREE Reports Request	2	0	2
Auto Lead-Capture	0	0	0
Total	**5**	**0**	**5**

Locating and Monitoring Captured Visitors

All captured visitors are automatically added to your **Contact List** in the Client Relationship Management (CRM). You can view the details of each captured visitor by clicking on the name of that captured visitor.

Product Packages

We have real estate website packages to meet your specific needs and fit your budget. **Get started now!**

ACCELERAGENT™ ULTRA WEBSITE

$399 set-up

$129 monthly or $1,290 annually

This is the complete package for individual agents who are looking to gain an advantage on the market by using the most comprehensive technology available. Ultra package provides all the features of the AccelerAgent Premium package plus the Comparable Market Analysis (CMA) tool. With CMA tool you can search MLS for comparable property listings and create information-packed reports in PDF format for you clients in one click.

Call **1-800-743-5820** to speak with your area sales representative or email info@propertyminder.com.

ACCELERAGENT™ PREMIUM WEBSITE

$299 set-up

$99 monthly or $985 annually

Some of the distinctive features include: fully automated Client Relationship Manager with auto follow-up campaigns, Auto Lead Capture, Automated MLS Searches with sophisticated Client and Listing Tracking features, Report Library with Lead Capture forms, Hits Tracking, Virtual Tour Studio, Transaction Management, Home Care Center with Lead Capture form, Client Personal Organizers and more.

Call **1-800-743-5820** to speak with your area sales representative or email info@propertyminder.com.

ACCELERAGENT™ STANDARD + WEBSITE

$199 set-up
$69 monthly or $699 annually

The AccelerAgent™ Standard + package provides automated MLS searches with sophisticated Client and Listing Tracking features, Client Relationshiop Management, Hits Tracking, Transaction Management, Client Personal Organizers and more.

Call **1-800-743-5820** to speak with your area sales representative or email info@propertyminder.com.

ACCELERAGENT™ STANDARD WEBSITE

$199 set-up

$59 monthly or $599 annually

The AccelerAgent™ Standard package does not provide automated MLS searches, however it is equipped with the fully automated Client Relationship Manager with Auto Follow-up Campaigns, Auto Lead Capture, Report Library with Lead Capture forms, Hits Tracking, Virtual Tour Studio, Transaction Management, Home Care Center with Lead Capture form, Client Personal Organizers and more.

Call **1-800-743-5820** to speak with your area sales representative or email info@propertyminder.com.