Client Account Tracking Index
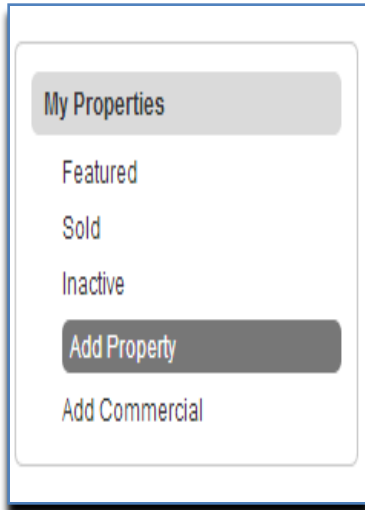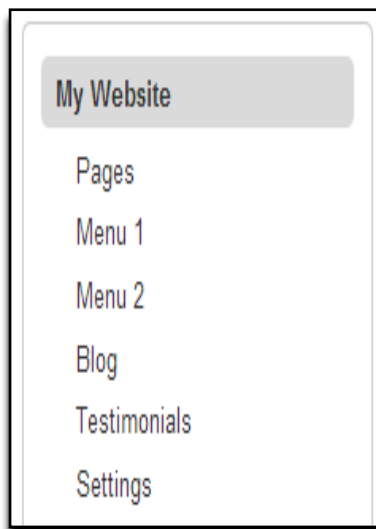
My Properties Menu

1. My Featured Listings (Featured)
   a. Ribbons
   b. Add Reciprocities
2. My Sold Listings (Sold)
   a. Change Sold Property Ribbon
3. Inactive
4. Add Property
5. Add Commercial

My Details Menu

6. My Details Menu

My Website Menu

7. Pages
   a. Add new page
   b. Edit existing page
8. Menu
   a. Edit labels
   b. Link to blog article or offsite in menu
   c. Add a page to a menu
9. Blog
   a. Add or edit new post
10. Testimonials

My Properties Menu - **Featured Listings**
(General Information)

1. Layout will look like *My Featured Listings* example screenshot on the right.
2. As the client, you can update the following areas:
   - o Off-market Properties Tab (green indicated box).
   - o Currently uploaded Featured listings
   - o Reciprocity Listings
   - o Upload Reciprocity Listings

Note: My featured Listings Page shows current listing(s) that are uploaded directly from MLS.

Client Account Tracking – Navigating My Properties Menu Continued

My Properties Menu –Featured Listings – **Ribbons**

(General Information)

3. **Ribbons** are customizable side banners that appear on the featured property listing pictures.

Example 1: Ribbon with Featured Listing

Example 1: Ribbon with Featured Listing (Left Blank)

4. **Ribbon Properties** is the drop down menu where the client can edit the Ribbon or mode feature. (Shown in example 2)

5. The client can choose to customize the Featured Listings with the following **Ribbons** or mode options to use:
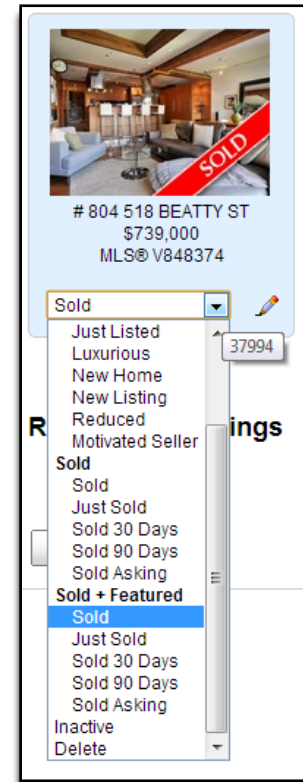   - o Ribbon

        For Sale;
        - ▪ No Ribbon (Will not show side banner)
        - ▪ Assignment
        - ▪ Coming Soon
        - ▪ Contemporary
        - ▪ Just Listed
        - ▪ Luxurious
        - ▪ New Home
        - ▪ New Listing
        - ▪ Reduced
        - ▪ Motivated Seller

        Sold;

        (Will **not** show up in **Featured Listings**)
        - ▪ Sold
        - ▪ Just Sold
        - ▪ Sold 30 Days
        - ▪ Sold 90 Days
        - ▪ Sold Asking

Example 2: Ribbon Properties

| Internal Document
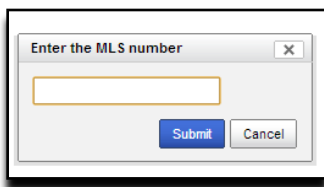
Sold and Featured;

(Will now show up in **Featured Listings)**

- Sold
- Just Sold
- Sold 30 Days
- Sold 90 Days
- Sold Asking

o Deactivate
- Hides listing from Online View

o Delete
- Deletes permanently from Featured Properties

My Properties Menu – My Featured Listings – **Add Reciprocity**
(Procedure)

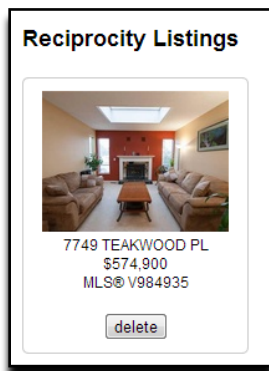1. Click on **Add Reciprocity** Tab.
   MLS Number screen populates.

   Enter the MLS number   ✕

   Submit   Cancel

   Example 5: MLS Screen

   Note: Reciprocity Listings are used to show other Real Estate Agent listings. Great idea for **new** Real Estate Agents starting out without any listings.

2. Add reciprocity asks for MLS Number (i.e: V9788232)
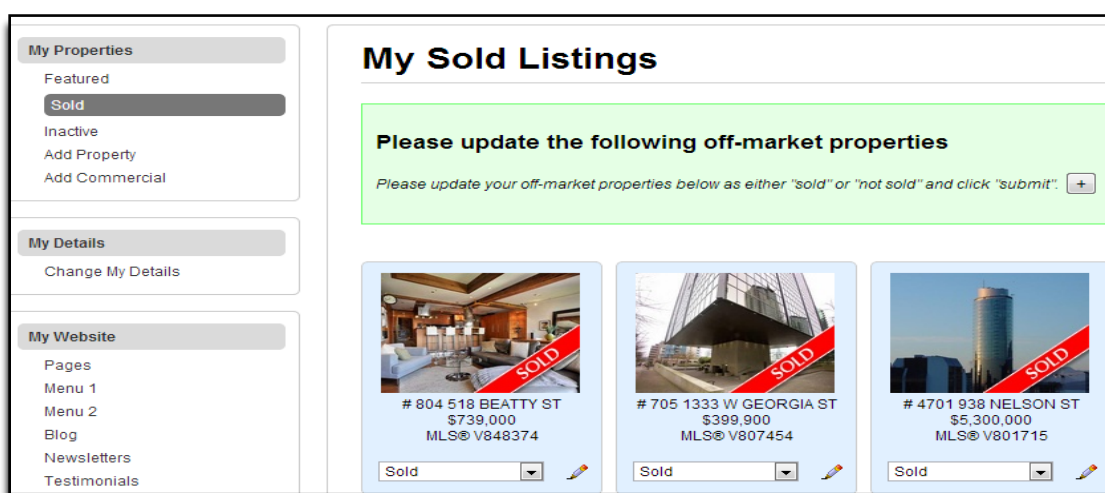   **Reciprocity Listing** will populate. Show

   Reciprocity Listings

   7749 TEAKWOOD PL
   $574,900
   MLS® V984935

   delete

Client Account Tracking – Navigating My Properties Menu Continued

My Properties Menu – **My Sold Listings**
(Procedure)
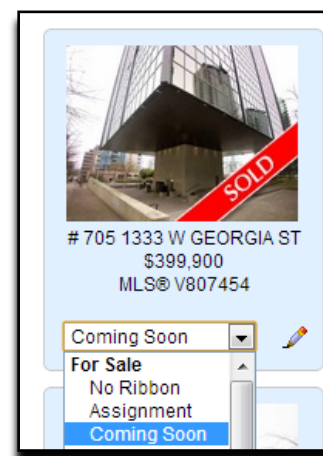
1. In My Properties Menu, click **Sold** option.

2. All Sold MLS searches will display on left hand page.
   (As shown below.)

My Properties Menu – My Sold Listings – **Change Sold Property Ribbon**
(General Information)

Important! If property ribbon is changed in the Ribbon drop down menu and the option is selected in Subsection **For Sale**, The Sold listing will disappear from My Sold Properties and placed in property listing as "**My featured Listings**." If Property is placed into Sold and Featured from My Properties

My Properties Menu – **Inactive**
(General Information)

1. In **My Properties** menu, click **Inactive** Option.
   Shows Inactive properties placed as inactive.

My Properties Menu – **Property**
(General Information)

1. In **My Properties** menu, click **Property** Option.

2. Can override MLS listings and add in properties that you have sold with other realtor group or real estate agent.

My Properties Menu – **Commercial**
(General Information)

1. In **My Properties** menu, click **Commercial** Option.

Note: MLS will **not** add Commercial Properties. Real Estate Agents will need to add in their own commercial properties. Please note that we also current do not provide commercial floor plans.
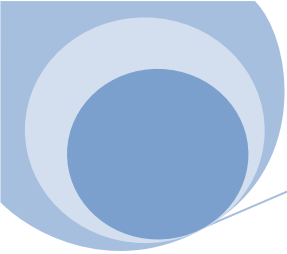
Client Account Tracking – Navigating My Details Menu

My Details Menu – **Change My Details**

(General Information)

1. In **My Details** Tab, click **Change My Details**.

2. Change My Details information will appear to the right.

My Details

ID	2
First Name	
Last Name	
Agency	
Address	
City	
Province	
Postal Code	
Phone	
Direct	
Cellular	
Fax	
Email	
Website	
Basic File Upload	○ Yes ◉ No

Note: Client will be able to update the following information that appears on their website.
(Information left blank)

Client Account Tracking – Navigating My Website Menu

My Website Menu – **Page**

1. In **My Website** Tab, **click** on **Pages**.

   Pages (Page) will populate in the main window.

Pages

Add New Page

Title	Excerpt	Type	Date
About Us	*As a REALTOR, I am dedicated to selling your house or finding you the dream home you are searching f*	About Us	26th Mar 2013
Blog		Blog	26th Mar 2013
Buyers and Sellers	*Buyers When you buy a home the steps to a successful purchase are very important, after all this is*	Buyers and Sellers	26th Mar 2013
Contact		Contact	26th Mar 2013
Featured Properties		Featured Properties	26th Mar 2013
Home Evaluation		Home Evaluation	26th Mar 2013
Links	*Real Estate: Realtylink.orgrealtor.caBC Assessment AuthorityCanadian Real Estate AssociationMultiple*	Links	26th Mar 2013
Listing Search		Listing Search	26th Mar 2013
Market News		Market News	26th Mar 2013
Mortgage Calculator		Mortgage Calculator	26th Mar 2013
Mortgage Rates		Mortgage Rates	26th Mar 2013
Property Map Search		Property Map Search	26th Mar 2013
Sold		Sold	26th Mar 2013
Testimonials		Testimonials	26th Mar 2013
Welcome	*Whether you are a buyer, a seller, an investor, or just browsing the market, here you will find all*	Welcome	28th Mar 2013
New Development	*New Development page Content coming soon!*		26th Mar 2013
2 Days Advantage	*Receive New Listings 2 days before MLS.ca [simpleform subject="sign up to get 2 days advantage" mess*		26th Mar 2013
Open House This Week	*Open House content Content coming soon!*		26th Mar 2013

Here you can create a new page or edit an existing one.

My Website Menu – **Add New Page**

1. In **Pages**, **click** on **Add New Page**.

   This window will populate. Edit your content.

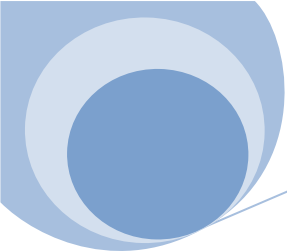## Add New Page

Your Page's Title (On the actual page)

Heading

Content

B I U

Paragraph | Font Family | Font Size | A

Here you upload pictures from your desktop

Write your content here

Once information has been filled out and uploaded. Scroll to the bottom and update this portion.

1. Fill in the information below and **click** on **Save**.
   Your page will now appear online.
   Click on the page again in pages.

2. To Preview the new page, click on preview Page at the top right.

3. This page is now live. Once you are satisfied with the new page, organize this page in My Menu's section.

1. In **Pages**, **click** on **any of the pages shown in blue**.
   Your identified page to edit will now populate.

Pages

Add New Page

Title	Excerpt	Type	Date
About Us	*As a REALTOR, I am dedicated to selling your house or finding you the dream home you are searching f*	About Us	26th Mar 2013
Blog		Blog	26th Mar 2013
Buyers and Sellers	*Buyers When you buy a home the steps to a successful purchase are very important, after all this is*	Buyers and Sellers	26th Mar 2013
Contact		Contact	26th Mar 2013
Featured Properties		Featured Properties	26th Mar 2013
Home Evaluation		Home Evaluation	26th Mar 2013
Links	*Real Estate: Realtylink.orgrealtor.caBC Assessment AuthorityCanadian Real Estate AssociationMultiple*	Links	26th Mar 2013
Listing Search		Listing Search	26th Mar 2013
Market News		Market News	26th Mar 2013
Mortgage Calculator		Mortgage Calculator	26th Mar 2013
Mortgage Rates		Mortgage Rates	26th Mar 2013
Property Map Search		Property Map Search	26th Mar 2013
Sold		Sold	26th Mar 2013
Testimonials		Testimonials	26th Mar 2013
Welcome	*Whether you are a buyer, a seller, an investor, or just browsing the market, here you will find all*	Welcome	28th Mar 2013
New Development	*New Development page Content coming soon!*		26th Mar 2013
2 Days Advantage	*Receive New Listings 2 days before MLS.ca [simpleform subject="sign up to get 2 days advantage" mess*		26th Mar 2013
Open House This Week	*Open House content Content coming soon!*		26th Mar 2013

1. In **My Website** Tab, **click** on **Menu**.

Menu will populate in the main window.

1. In **Menu's**, **click** on **Add New Menu** button.
   This page will populate (as shown below)

General:

For Editing Labels:

For creating a link to a page or to a blog article/category you've created on your site:

For adding in new pages you've just created!
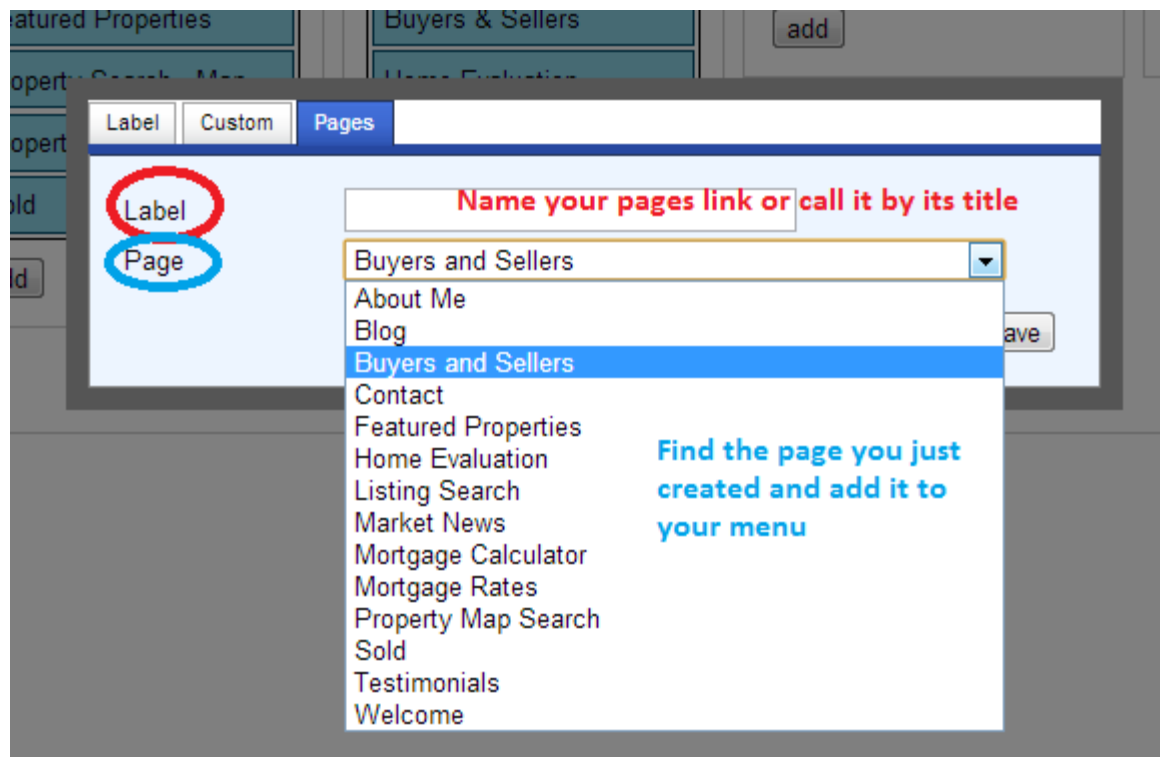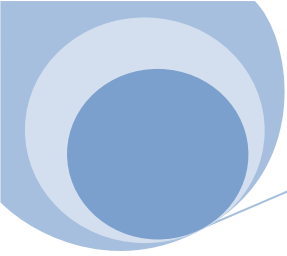
1. In **My Website** Tab, **click** on **Blog**.

   Blog Page will populate in the main window.

My Blog

Add New Post   Click Here to add new post

Date	Title
15-03-2013	New Listing 1344 128a Street, Surrey, BC
04-03-2013	New Listing # 105 9333 ALBERTA RD, Richmond, BC

Click on any of these to edit current post

Client Account Tracking – Navigating My Website Menu

My Website Menu – **Add New Post (Blog)**

1. In **Blog**, **click** on **Add New Post** button.
    This page will populate (as shown below)

2. Once indentified items are filled in click on publish **(yes)** and **click** on **Save** button.
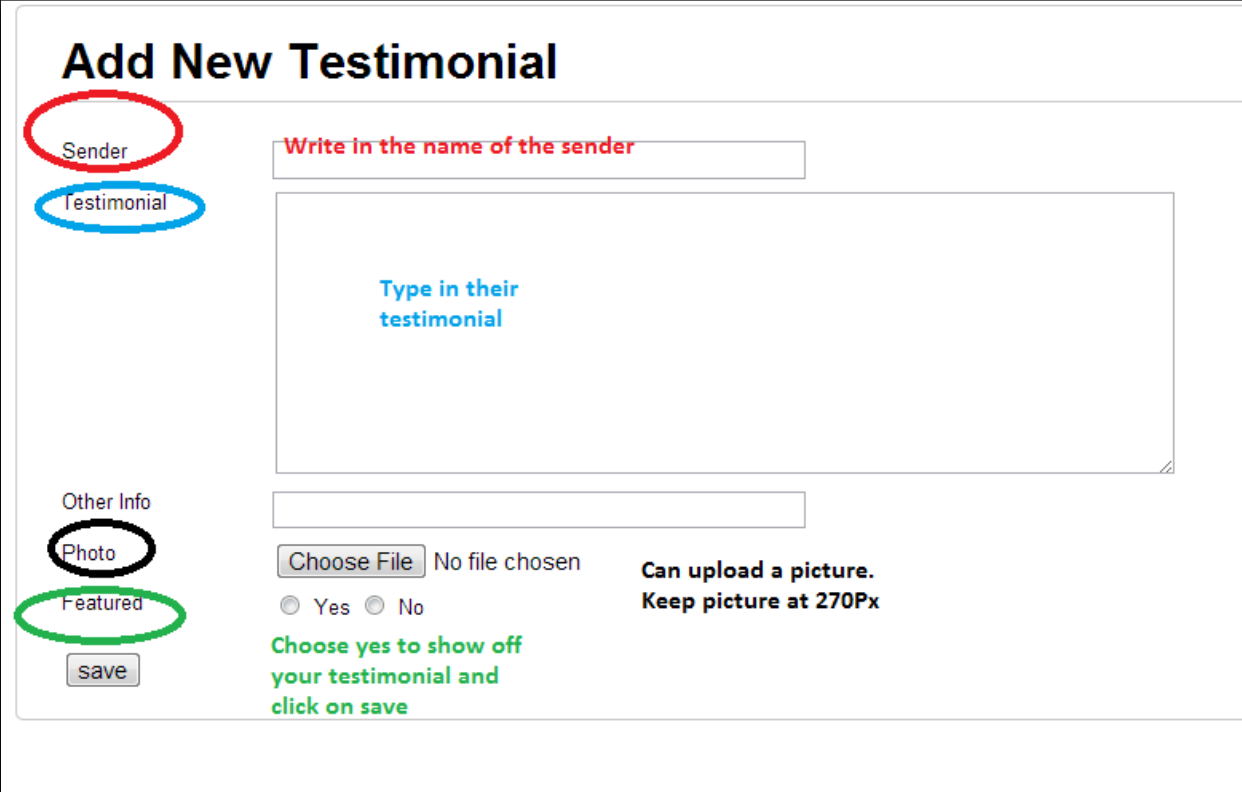
My Website Menu – **Testimonials**

1. In **Testimonial**, **click** on **Add New Testimonial** button.
   This page will populate (as shown below)

Add New Testimonial

Sender — Write in the name of the sender

Testimonial — Type in their testimonial

Other Info

Photo — Choose File No file chosen — **Can upload a picture. Keep picture at 270Px**

Featured — ○ Yes ○ No — **Choose yes to show off your testimonial and click on save**

save

2. Once indentified items are filled in **click** on publish **(yes)** and **click** on **Save** button.

| Internal Document