



Quick Start Guide



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Introduction

Quick Start Guide ■ The Portal

Welcome to The Portal

Your Portal is a repository for information shared between you and your agent. It's a central location that organizes Auto Searches, Reports and Selected Listings in a way that helps you better manage each of them going forward.

Your Portal also allows you to create, and save, your own Custom Searches. It's a communication tool that, through email or listing notes, connects you with your agent whenever additional property information is required.

And, finally, because your Portal is dynamic, you're always viewing live, up-to-the-minute data. So, whether there's been a change in listing price or, perhaps, an updated public remark, you'll see it all in real-time.

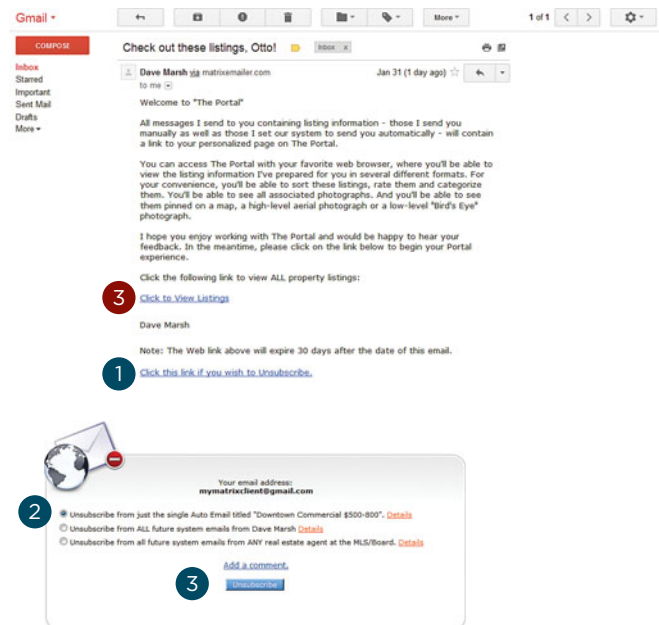
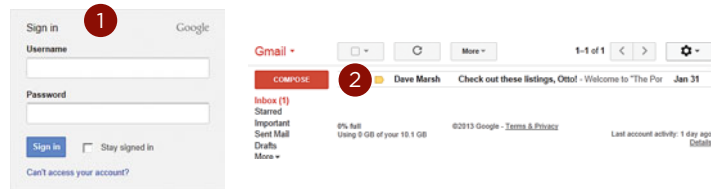
So, let's explore, in detail, each of the features that will come to make your Portal experience a productive one.

Enjoy.

Notification

Email Notification

- 1 **Sign in** to the application (i.e., Outlook, Gmail, Hotmail etc.) where you are currently receiving email from your agent.
- 2 **Open the message** that appears from your agent.
- 3 Click this link to **open your Portal**.



Unsubscribe

- 1 Click this link to **open your unsubscribe options**.
- 2 **Select an option.**
Option 1: If you are currently subscribed to one, or more, Auto Emails, select this option to unsubscribe from the one that you are currently being notified of.
Option 2: If you are currently subscribed to multiple Auto Emails from multiple agents, select this option to unsubscribe from all Auto Emails sent on behalf of the agent currently notifying you.
Option 3: If you are currently subscribed to multiple Auto Emails from multiple agents, select this option to unsubscribe from all Auto Emails sent by all agents.
Note: if available, any additional comments (optional) are logged for internal use and are not visible to your agent.



- 3 Click the **unsubscribe button**.

Note: an message confirming that you have unsubscribed will automatically be sent to your agent. You will need to contact your agent to re-subscribe.

Welcome Tab

Agent Information

- 1 Displays your agent's **contact information**.

Note: if a, "Portal Greeting" is available, use the, "show"  icon and the, "hide"  icon to toggle its visibility.

Slideshow


- 2 Automatically **rotates listings** that you have added to your, "Favorites" or, "Possibilities" folder.

Note: if you have not added any listings to your, "Favorites" folder, the slideshow will present listings from your, "Possibilities" folder. If no, "Possibilities" exist, the slideshow will not be visible.

Note: click the, "Back", "Pause" or, "Forward"    icons to control the slideshow.

Portal Greeting

- 3 If available, displays a **welcome message** added by your agent.

Note: click the  icon in the corner to close the, "Portal Greeting" (see, "Agent Information" in the, "Welcome Tab" section to toggle its visibility).

Direct Emails and Reports

- 4 Click any link to display **information sent directly**, to you, from your agent.

Note: displays 20 items before a, "Show more" link appears at the bottom.

Note: filter results by selecting an item from the, "Show" dropdown list in the, "Direct Emails and Reports" section header (shows, "All" by default).

Note: icons represent, "Direct Email and Report" types including: CMA's, Driving Directions, Selected Listings, Stats or Custom Reports.

Note: clicking a Driving Directions or Stats link will open a new tab.

Note: clicking a CMA or Report link will open an external .pdf file.

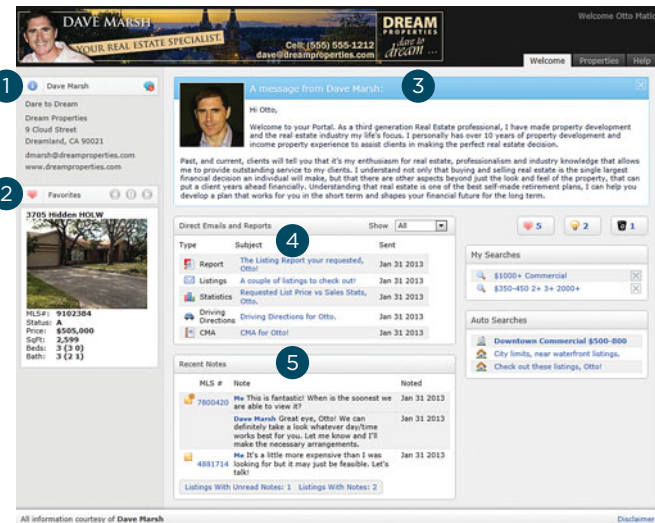
Recent Notes

- 5 Displays the most recent 3 **notes** to, and from, your agent for up to 10 listings.

Listings with Unread Notes: click this link to display only listings with unread notes.


Listings with Notes: click this link to display all listings with read, and/or unread notes.


Note: see, "Listing Notes" in the "Properties Tab" section for more information.




Listing Folders

- 6 Contain a **collection of listings** according to how you organized them.

Favorites: click the, “Favorites”  icon to view listings you've added as a favorite.

Possibilities: click the, “Possibilities”  icon to view listings you've added as a possibility.

Discarded: click the, “Discarded”  icon to view listings you've discarded.

Note: see, “Listing Folder (Add to)” in the, “Properties Tab” section for more information.

My Searches

- 7 Displays a list of the **custom saved searches** you have created in the Portal. Click the link to view your results.

Note: clicking on a custom saved search link, then updating and saving it with the same, or new, name will overwrite the original custom saved search.

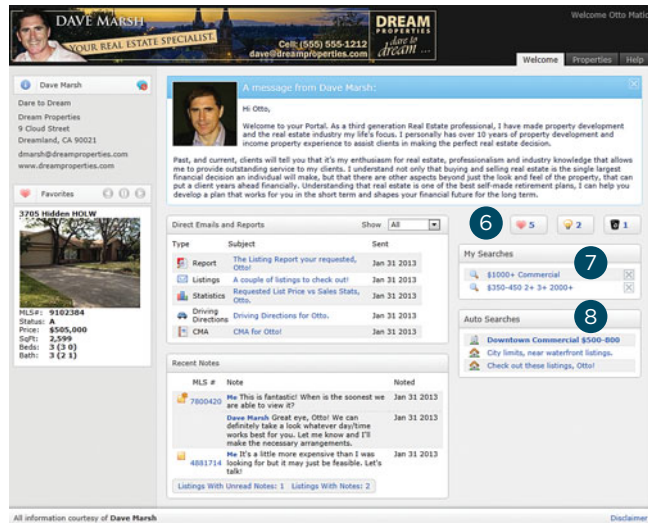
Note: click the, “delete”  icon to permanently delete a custom saved search.

Auto Searches

- 8 Initially set up by your agent, this list displays searches **automatically emailed** to you when new listings that meet your criteria appear on the system. Click the link to view your results.

Note: bold links represent Auto Searches with new listings that have not yet been viewed.

Note: icons represent various, “Auto Search” types.





Properties Tab

Search

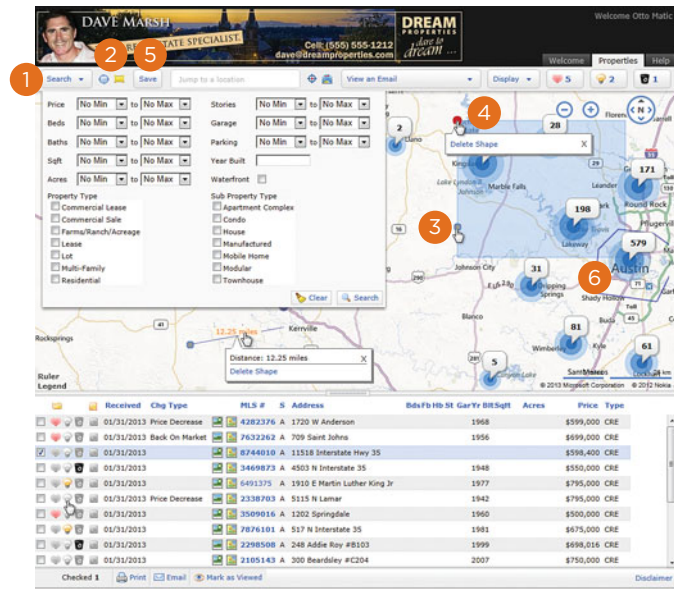
- 1 Click the, “Search” button to display available **search criteria options**.

Note: where applicable, use textbox ranges such as, “Year Built”: 1995-2013 (for years between 1995 and 2013), 1995+ (for years greater than, and including, 1995) or 2013- (for years less than, and including, 2013).

Map Shapes (Add)

- 2 Isolate your search to specific areas on the map by selecting either the radius  tool, the rectangle  tool or by using a combination of both.

Note: click a shape to enable it then click and drag your cursor over the map to isolate a specific area.



Map Shapes (Edit)

- 3 Hover your cursor over the edge of a shape then, when a dot appears, **click and drag the border** to its new position.

Map Shapes (Delete)

- 4 Hover your cursor over the red dot then, from the pop-up, click the, “Delete Shape” link.

Save

- 5 Click the, “Save” button to **save the custom search** you created.
- Note:** see, “My Searches” in the, “Welcome Tab” section for more information.

Clusters

- 6 Clusters are a collection of listings that are grouped together, by area, when there are too many listings to display on the map. **Click any cluster to zoom in** and display listings in that area.
- Note:** some clusters may contain additional clusters.

Jump to a location


- 7 Type a location such as a city or street name to quickly **jump to a specific map area**.

Note: select the correct location from the modal pop-up window if there are multiple results returned.

Recenter Map

- 8 Click the, “Recenter Map”  icon to set the map to its **default position**.

Map Layers

- 9 Click the, “Map Layers”  icon to **display various layer options** (such as, “Points of Interest” including banks, fire stations, police stations, libraries and post offices etc.).

Note: you may be prompted to **zoom in**   on the map to enable select options.

View Listings

- 10 Click this button to display a **collection of emails with listings** or view **listings with notes** sent between you and your agent.

Display

- 11 Click the, “Display” button to **change how the results are currently being displayed**.

Ruler (Add)

- 12 Click the, “Ruler” link then click two points on the map to **measure the approximate distance** between both.

Ruler (Edit)

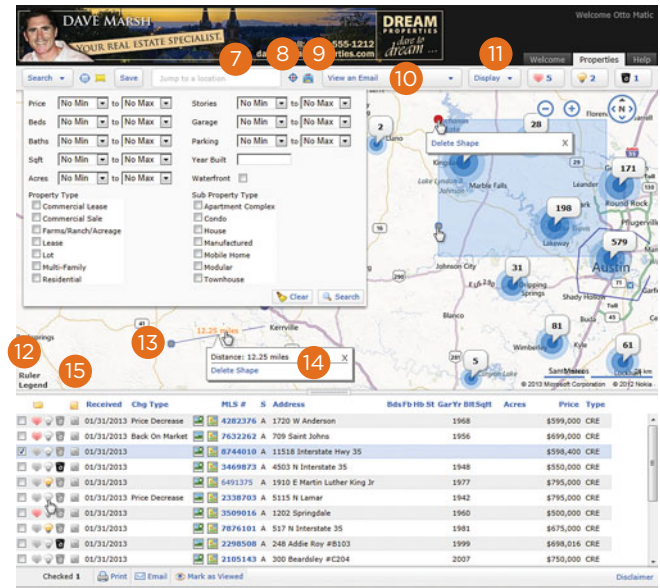
- 13 Hover either end of the ruler shape then click and drag the line to **update its distance**.

Ruler (Delete)

- 14 Hover the numerical distance displayed then, from the pop-up, click the, “Delete Shape” link.

Legend




- 15 Click the, “Legend” link to display **map marker color definitions**.









Listings

- Portal listings are ordered according to their relevance (see below). Click the, “Listing Number” to **open a full display**.
First: newly arrived listings that have not yet been viewed.
Next: existing listings that have not yet been viewed.
Last: viewed listings.
Note: listings that have not yet been viewed and are, by default, less than 72 hours old are highlighted and have **bold listing numbers**. Listings that are, by default greater than 72 hours old and have not yet been viewed are represented by just **bold listing numbers**.

Listing Folder (Add to)

- Categorize any listing by adding it to one of the following three folders:
Favorite: click to highlight the, “Favorite”  icon if this is a listing you would like to continue to watch and follow up on with your agent.
Possibility: click to highlight the, “Possibility”  icon if this is a listing you would like to continue to watch and possibly follow up on with your agent.
Discard: click to highlight the, “Discard”  icon if this is not a listing you are interested in.




Listing Folder (Remove from)

- Click the, “Favorite”, “Possibility” or, “Discard”    icon to **remove the listing** from its current folder.
Note: once the listing is removed, the selected icon will appear in an “OFF”    state.




Listing Folder (View)

- Click a listing folder button to **display its contents**.



- Favorites:** click the, “Favorites”  icon to view listings you’ve added as a favorite.
- Possibilities:** click the, “Possibilities”  icon to view listings you’ve added as a possibility.
- Discarded:** click the, “Discarded”  icon to view listings you’ve discarded.
- Note:** numerical value indicates the number of listings contained in folder.
- Note:** see “Listing Folder (Remove from)” in the, “Properties Tab” section for more information.

Listing Note (Add)

- Click the empty, “Note”  icon to open a listing and **create a note** for it.
Note: listings with notes are indicated by a highlighted note  icon.
Note: listings with unread notes are indicated by a note with an asterisk  icon.
Note: see, “Listing Notes Panel” in the, “Properties Tab” section for more information.

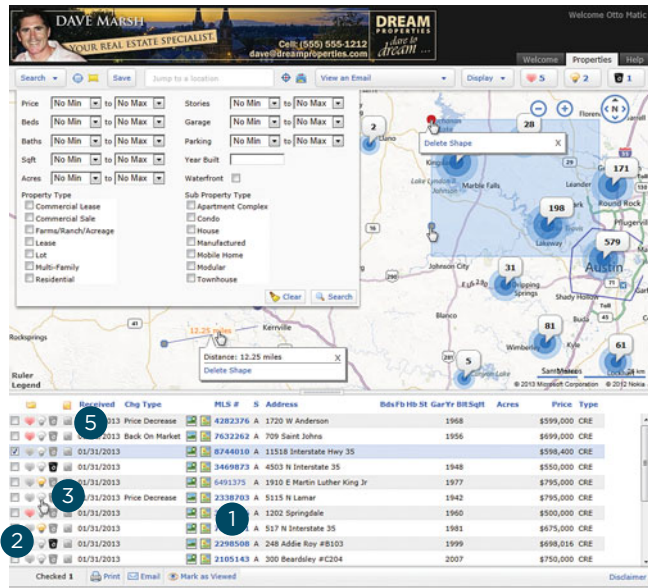



Photo Icon

- 6 Click the, “Photo”  icon to **open listing photos** in a pop-up modal window.

Note: see, “Listing Photos” in the, “Properties Tab” section for more information.

Map Icon

- 7 Click the, “Map”  icon to **view where this listing is located** on a map.

Note: see, “Listing Map” in the, “Properties Tab” section for more information.

Listing Actions

- 8 **Select one, or more, listings** to activate the following actions:

Print: click the, “Print” link to open your print options dialogue box as well as the selected listing(s) in a new browser window.


Email: click the, “Email” link to send the selected listing(s), with a mandatory message, to your agent.

Mark as Viewed: click the, “Mark as Viewed” link to un-bold the listing number.




Scroll Bar

- 9 Click, and drag, the scroll bar to **resize the map and property details** viewing areas.

Listings (Full Display)

- 1 Click the, “Note”  icon to open the, “**Listing Note Panel**”.

Note: see, “Note Listing Panel” in the, “Properties Tab” section for more information.

- 2 Click the, “Favorite”, “Possibility” or, “Discard”    icon to **add, or remove, the listing** from its current folder.

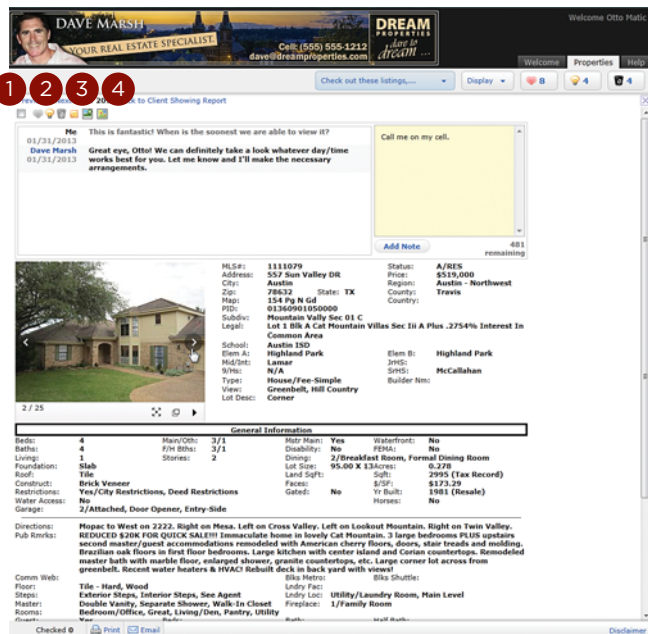
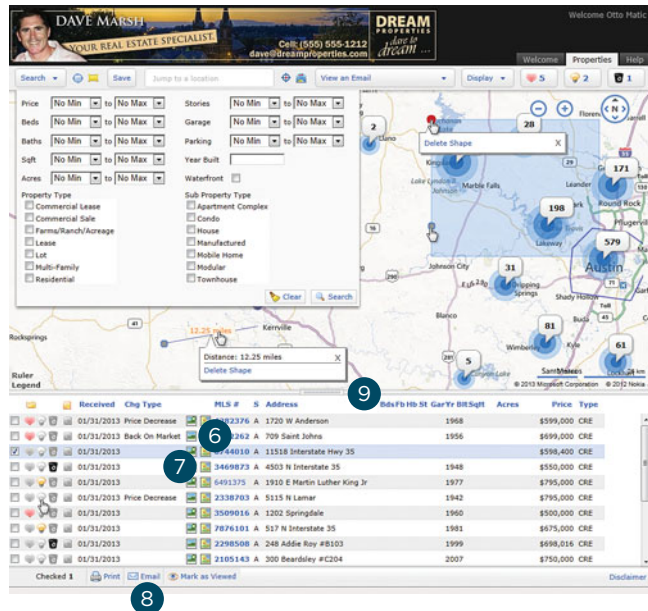
Note: see, “Listing Folder (Add to)” or, “Listing Folder (Remove From)” in the, “Properties Tab” section for more information.

- 3 Click the, “Photo”  icon to **open listing photos** in a pop-up modal window.

Note: see, “Listing Photos” in the, “Properties Tab” section for more information.

- 4 Click the, “Map”  icon to **view where this listing is located** on a map.






Note: see, “Listing Map” in the, “Properties Tab” section for more information.





Listing Note Panel

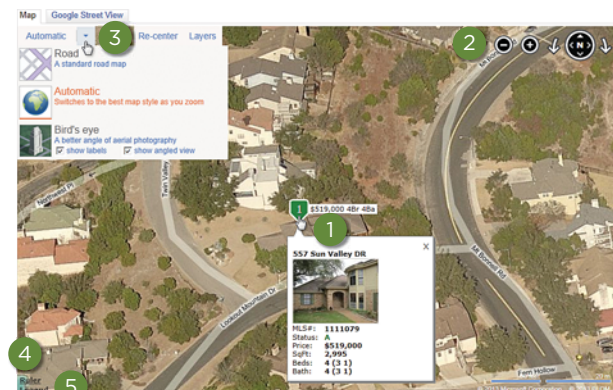
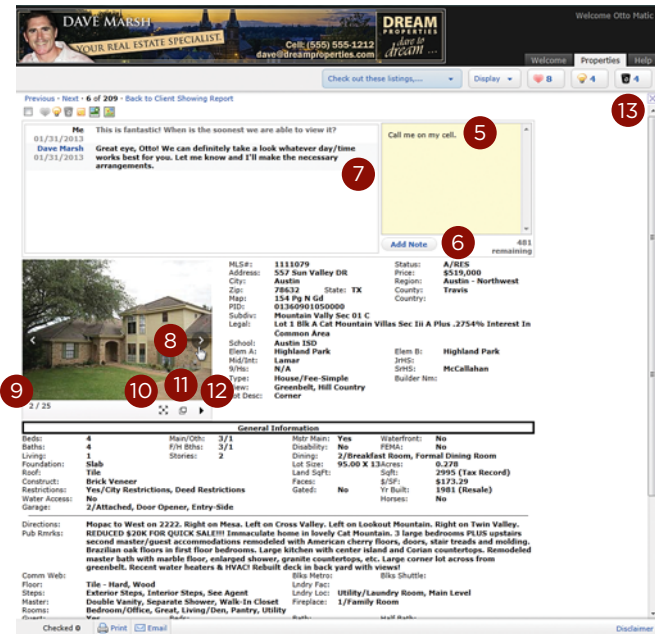
- 5 Enter the **message** that you would like to send to your agent.
Note: maximum 500 characters.
- 6 Click the, “Add Note” button.
- 7 Displays, sequentially, the **conversation notes** between you and your agent.

Listing Photos

- 8 Hover over the main listing photo and click either arrow   to cycle through the photos.
- 9 Displays the **number of photos** available.
- 10 Click the main listing photo, or the, “Expand”  icon to **open photos in a modal pop-up window**.
- 11 Click the, “New Window”  icon to **open photos in a new window**.
- 12 Click the, “Play/Pause”  icons to **control the photo slideshow**.
- 13 Close the display.

Listing Map

- 1 Click the map marker to **view a thumbnail pop-up** of your listing.
- 2 Click the, “Zoom”   controls to zoom in to or out of your listing or, if available, your mouse wheel to scroll.
- 3 Click the arrow to select a, “Road” or, “Bird’s eye” view.
Note: when the Bird’s eye view is displayed, you can rotate the view, by clicking the directional control beside the zoom controls.
- 4 Click the, “Ruler” link then click two points on the map to **measure the approximate distance** between both.
Note: hover either end of the ruler shape then click and drag the line to update its distance.
Note: hover the numerical distance displayed then, from the pop-up, click the, “Delete Shape” link.
- 5 Click the, “Legend” link to display **map marker color definitions**.
- 6 Click the, “Google Street View” tab (where available) to display a street level view of this listing. Navigate the area by clicking the image and moving your mouse.



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