Agent XSites

Everything You Need to Manage Your Business Online

Getting Started

Getting Started

Your XSite is more than just a web page or billboard. With more and more of your business being conducted at your client's home, or on the road, you need something that's available at all times from anywhere. That's what your XSite does – manage listings, e-mail, communicate in forums and more.

We're happy to bring you this new technology and confident you'll find it an easy way to enhance your real estate business — and maybe just have some fun doing it!

System Requirements

To use the Wizard to setup and maintain your new XSite properly, your PC will need to meet some basic system requirements.

- Operating System: Windows 98 or newer
- Display: 800x600 (Minimum), 1024x768 or higher (Recommended)
- Microsoft Internet Explorer 5.5 or higher
- Macromedia Flash 8 or higher

You may need to turn off ZoneAlarm or other desktop Internet security features if you encounter unexpected errors while managing your XSite.

Alternative web browsers, such as Mozilla, Opera, Netscape and Firefox, are not supported when managing your XSite. Please limit yourself to the use of a Windows-based PC running Internet Explorer 5.5 or higher when accessing the administrative portions of your XSite.

Logging In

Immediately following your XSite purchase, you're sent an e-mail that tells you how to log into your site for the first time. You'll receive the link to your XSite setup start page as well as the username and password that were created at the time you placed your order.

Note: You can change your password at any time using the User Management functions of your XSite.

The central management point for your XSite is the **My Office** screen. From here you can access the functions to build your site, manage users, control your search engine efforts and more.

To access the **My Office** page:

1. In your browser, type your XSite's URL, followed by "/admin". For example:

Hint: You can also add a link directly to your login page at the bottom of your XSite pages by including it in your Site Footer.

2. Enter your site **Username** and **Password** and click **Login**.

My Office

The **My Office** screen is your portal to all of the administrative functions of your XSite. From here you can:

- Manage user accounts,
- Edit the look and feel of your XSite,
- Add or modify content,
- Manage your contacts,
- Schedule appointments,
- And so much more...

All of these operations are accessed from the pull down menus at the top of the screen. As you hover your mouse over each option, a drop-down menu appears, presenting additional options.

But the **My Office** page is even more than that. It's also a business management screen. At a glance, you get valuable information about your business. For example, how many message are waiting in your e-mail inbox. Or click the **Today's Schedule** tab and see what you have on tap for the day.

My Office

Search My Office

One of the handy tools found in **My Office** is the ability to quickly find a contact or appointment.

To find a contact:

1. Click the **Search Contacts** option in the **Search My Office** panel.

2. In the pop-out menu, type the information you'd like to search for in the **Look for:** field.

3. From the **Search:** drop-down menu, select which Contact field you'd like to look in: first name, last name, company, etc.

4. Click **Search** and your results appear in a new window.

To find an appointment:

1. Click the **Search My Schedule** option in the **Search My Office** panel.

2. In the pop-out menu, select a date range to search, using the calendar tools.

3. Now, type a keyword or other item into the **Look for:** text box and click **Search**. Any appointments in your calendar within that date range and containing the text you entered are displayed in a new window.

4. Clicking the **Completed** check box displays past appointments, as well as those in the future.

XSites Network Links

The XSites Network is an online resource with a wealth of information available. Use it to find a fellow real estate professional - agents, appraisers, inspectors, mortgage brokers, title companies - anywhere in the nation. Plus, as a member of the XSites Network, your colleagues can find you as well.

Or, use these tools to find a property from the listings inventories of fellow Agent XSite users throughout the country. Click the **Search for a Property** link to initiate a new search.

Whenever an agent adds a property located in your area to their XSite's listings, it is immediately displayed in the **New Properties** section of this window, so you can keep up with the latest listings in your area right from the **My Office** screen.

This panel also allows you to use the XSites Network to set up and manage the listing partnerships through the XSite's **Listings XChange**.

Find a Real Estate Professional

Real estate is an industry that thrives on the relationships built between the various market participants. Agents work with mortgage brokers to give their customers the best rates. Brokers contract appraisers to protect their investments. Inspectors assure the parties that the property is sound.

Since a la mode provides software in each of these markets, we've been able to build a nationwide network of real estate professionals which you can search to find someone outside your usual contact group.

1. From the **My Office** screen, click the **Find a Real Estate Professional** link in the **XSites Network** pane.

2. In the pop up menu, enter as much information as you have into the text boxes. Obviously, the more data you can enter, the more refined your search will be.

3. Click the check box or boxes on the right to indicate what kind of company you'd like to find. You can select as many as are applicable.

4. Click **Search** and your results are displayed in a new window. Jot down the contact information, or click the URL to visit the company web site. Click **OK** to close the window.

Search for a Property

Agents around the country are adding listings to their XSites every day. This is creating a nationwide listings database which you can use to locate properties - and agents - for buyers moving outside your area. When you

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locate a desirable property, you simply click the e-mail link and get right in touch with the listing agent.

1. From the **My Office** screen, click the **Search for Property** option.

2. Complete as many fields as applicable, and then click **Search**.

3. A new window opens showing the listings on the XSite Network that match your criteria. Click the **View Details** link to find more info about any property, and contact the listing agent directly.

Listings XChange

One of the most powerful features in your XSite is the ability to share listings with other agents. Whether you're building a network with other agents in your own office, or a group of colleagues around your area, you can instantly have access to each other's listings by setting up a sharing relationship.

This feature is particularly useful to brokers or agent teams that want to aggregate their listings on each site yet maintain control over their individual listings and leads.

 Note: At this time, in order to share listings, all agents must have an Agent XSite.

To create your own listings network, from the **My Office** toolbar, click the **Listings XChange option in the Listings drop down menu.** This opens the tool that helps you identify and sign up other agents to be part of your group.

The process involves three simple steps:

Step 1: Locate and invite another agent to share their listings with you.

Step 2: The other agent is notified via e-mail of your request and can then enter their XSite to either accept or decline your invitation.

Step 3: Once they've accepted, their listings are automatically included along with yours for use on any of your XSite's listings pages. For help with setting up custom listings pages, see the Creating New Listings Pages section of this manual.

Agent Community

The **Agent Community** tools are designed to help you keep in touch with your fellow real estate professionals and the industry as a whole.

- **Newsletter** - Check out the latest edition of the a la mode newsletter. In it you'll find up-to-minute information on our software, as well as breaking news stories that affect your business.

- **Inman News** - The day's top real estate news from the leading news source dedicated to this industry.

- **Refer a Friend** - If you're happy with your XSite, why not tell a friend. The more colleagues you have using XSites, the larger your base of Listings can be. Plus, you can earn a cool $100 toward your next renewal.

- **Product Release History** - We're constantly adding new features, themes and content to XSites. This link let's you keep an eye on what's new.

XSites Wizard

The **XSites Wizard** is where you actually create your company's website. We've designed our interface so that you don't need to know complex HTML programming to create a top notch website that not only looks good, but also "does something" like generate leads and improve your customer service.

Don't let the easy interface fool you though. There's serious technology behind your XSite – that's what makes it possible to change your entire look with just a couple of clicks or enable online ordering by just checking a box. To get started with our easy wizard, click the **XSite** button at the top of the screen.

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Note: As you move through the XSite Wizard, your changes are made "live" whenever you click **Save** or when you simply go to another step. This requires a little forethought before going and changing things, but it certainly spares you the hassle of making sure you uploaded all the images for a page.

To see the effects of your changes at any time, simply click the **My XSite** button from the XSite drop-down menu and a new window opens to show you your XSite.

My Theme

The first step in launching your XSite is selecting a **Theme**. This controls the general "look" of your site, including the header image, layout, colors and more.

- Themes are broken up into categories and sub-categories. Scroll through the list on the left to select a primary category. The first 10 themes in that category are displayed in the bottom window. Click a sub-category heading to narrow the selections. Click any of the thumbnail images to get a larger view of that theme.

- Animated themes are denoted with the movie reel. These typically have a moving graphic in the header and rollover animation when your mouse goes over the links for your main content.

- All the colors and graphics in your theme are customizable. (That's the next step in the wizard.)

Once you've decided on a theme:

1. Click the image for the desired **Theme**.

2. Click the **Choose this theme** button to lock in your choice.

3. Click the **Save** button to lock in your selection, or click the **Next** button to save it and move to step 2 of the wizard.

Theme Preferences

As we mentioned before, our themes are just a starting point. In step 2 of the XSites Wizard - **Theme Prefs** on the menus - you can completely change the look of your website.

Adding a Company Logo

Many organizations already have a customized company logo, or perhaps your brokerage or franchisor supplies you with one. You can include this logo on your XSite if you have access to the logo in one of the common, web graphic formats, such as .gif, .png, .bmp or .jpg. If these formats are unfamiliar to you, or your logo is in a different format, you may need to consult a web-savvy graphics designer to get your logo ready for use.

Note: Your logo will look the best when its background matches that of your header image or site background. You'll also want to make sure it fits our recommended size of 240x80 pixels so it "fits" on your site.

To include your logo on your XSite:

1. Click the **Include my logo** check box

2. Next, click the **Upload your logo** link.

3. Browse to the graphic file on your PC that contains your logo, select it and click **Open**.

4. Finally, click **Upload**.

5. You'll now see your logo in your site preview to the left. Use your mouse to drag it to the desired area of your site header.

To remove your logo at any time, simply un-check the **Include my logo** check box. If you desire, you can also remove the logo image from the wizard by clicking the **Remove your logo** link.

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Adding a Photo

If you have a picture of you or your team, it's a nice personal touch to have it on your site. It's also a good way to reinforce your image in the market. Some agents add additional "flair" to their sites by using an action photo or even a picture of a company pet or mascot. The point is, you can use whatever image best suits your purpose.

To include a photo on your XSite:

1. Click the **Include my photo** check box.

2. Now, click the **Upload your photo** link

3. Browse to the photo on your PC. You can use any standard graphic format, such as .gif, .png, .bmp, or .jpg. Select the file and choose **Open**.

4. Finally, click **Upload**.

Your photo should now be included on your site. To remove your photo at any time, simply uncheck the **Include my photo** check box. If you desire, you can also remove the photo from the wizard by clicking the **Remove your photo** link.

💡**Hint:** When you upload a photo, your XSite scales the image to fit in the space allotted, based on the theme you've chosen. At times, this may cause your image to appear blurry or jagged. Instead, we recommend that you create a copy of your photo that is as close to the "optimum" image size as possible. You'll find the best size for your photo - 120 x 160 pixels, for example - listed at the bottom of the My Photo section of the Theme Prefs page.

Customizing the Background Image

The background image is the graphic in your XSite header. This default image can be changed to one of several included with your XSite, or to a custom image you've created yourself that is more in line with your company style or that reinforces your company's marketing image.

🌐 **Note**: Some Themes do not allow you to change this item. If the Background Image section of the page is not displayed, then this feature is not available for the Theme you have chosen.

💡**Hint:** This is the single, largest image on your XSite. It is most likely to get noticed by your visitors, and so you should pay particular attention to what the image portrays. Also, each XSite Theme has a slightly different image size. Below the **Background Image** links is a note providing the best image size for the theme you've chosen. Make note of this size before you create your graphic.

To change the background image on your XSite:

1. Click the **Change your image** link.

2. The **Upload Your Header Image** window opens, and includes two tabs: The first lets you choose a new header from the collection provided with your XSite. The other lets you upload one from your local PC.

3. To use a **Provided Header** graphic, first single-click on the file names in the list to see a preview. Once you find the one you want, click **Upload**. Notice some of these are from other themes. So, if you don't like the layout of one theme, you can still use its graphic.

4. To use a graphic you've created, click the **Upload a Header** tab.

5. Browse to the saved image on your PC and click **Open**, then **Upload**.

🌐 **Note**: Creating a background requires more than basic PC skills and is something you may have fun creating with a photo editor or by paying a graphic artist – just like you paid someone to do your logo. Also, make sure


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the size of your image is under 50K so visitors won't have to wait too long for your website to load.

Color Options

In each **Theme**, you'll find several color schemes that match the default background. You can choose one of these schemes from the drop-down list under **Color Options**.

If you want a color scheme that is all your own, you can change the various border, navigation and text colors as well.
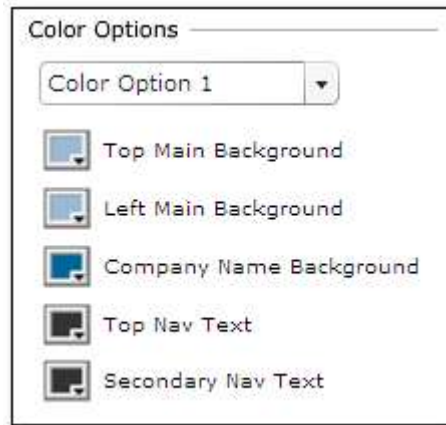
- When setting custom colors, you can see which part you are actually changing by hovering your mouse pointer over the description, such as **Top Border Background** or **Background Graphic**. The corresponding area of your preview to the left will flash as you move across the link.

- To change the color, click the colored box to the left of the description and then choose the desired color from the palette. If you're a graphic guru, or your company requires a particular shade of a certain color, you can also type in the "HEX" number of the color at the top of the color palette.

Putting Your Company Name in the Header

Including a text header is a lot easier than creating a custom header image or formatting your logo and still gives you several options for highlighting your company name.

1. Before you start modifying text, ensure that the **Include my company name** check box is selected.

2. Type your company name in the large text box. This information is pre-loaded with the company name you provided when you signed up for your Agent XSite, but you can change it here.

💡**Hint:** To insert a line break in your company name, press **Shift**+**Enter**.

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3. Above the text box, you'll find several options for modifying the text. These should be familiar to anybody who's used a word processor.

4. Turn on Bold, Italics or Underline by clicking the appropriate button.

5. Select the font color by clicking the colored box and choosing a shade from the palette. Note that on dark backgrounds you may want to use white or some other light-colored text. If necessary, the background of the text box will change so you can still see the text.

6. Choose the font style and size you desire from the appropriate drop-down menu.

🌐 **Note**: Your font choices are limited to those standard to Microsoft Windows; that way, your company name appears as intended on nearly all computers.

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7. On the sample screen above, you'll see how your text looks on your XSite's header. Simply use your mouse to position your company name exactly where you want it.

8. Next, enter your **Secondary header text**. This is your slogan that appears in your site header and one of the first things people see on your site. So, put the main thing you want people to know about you in this line.

If you're using a custom logo file with your company name in it, you can turn off the text by simply un-checking the **Include my company name** check box.

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Animating the Site Header

Changes to your site header don't stop with step 2. Under the **Extra Tools** menu pane located on the left side of the wizard screen, we've provided additional features to give your otherwise "static" company name more pizzazz as your site loads.

 Note: Header animations only work with text company names. If you're using a logo file to display your company name, you won't be able to use this feature to animate it.

To animate your header:

1. While in the XSite wizard, click the **Header Animation** link found in the **Extra Tools** menu.

2. The company name text box is displayed in the **Header Animation** box. If you haven't already edited your company name by changing the font color, style or size, you can do it here using the controls located above the text box.

3. The **Header Animation** feature affects the entire company name, so you don't have to highlight any one part of it.

4. Now, under the **Animation Settings** section, select the various options for the type of animation, target, direction, effect, and timing.

5. As you choose an animation tool, additional options appear below. For example, if you choose the **Fly** animation, a box appears allowing you to select which area of the screen you want the text to "Fly in" from.

6. For a **Target**, you can choose either the **Entire Word**, which animates your company name as one block, or **Each Letter**, which animates each letter separately.

7. Naturally, you'll want to experiment with all the options to find the effect that's right for you. To see how the options you've chosen will look, click the **Preview Animation** button to see it in action.

8. Once you've decided on the animation, just click **Save**.

If you want to turn off the **Header Animation**, just return to this part of the wizard and select **None** for the animation type.

My "Flash" Intro

A "flash" intro (one that uses the Macromedia Flash tool) is often found on high-end web sites. They are expensive to create, but we've provided customization so your XSite can have one as standard fare. You have three options:

- **Disable your site intro** - This means visitors to your site will go straight to your home page.

- **Use basic intro options** - We've got several intros already built. Just take a minute or two to pick one, customize the colors and enter text. It's fast and easy.

- **Use advanced intro options** - XSites give you the ability to put together a whole slide show that plays when someone visits your home page. You'll decide the images, timing, text, and animation.

Basic Site Intros

To implement a **Basic Intro:**

1. Click **Use basic intro options**.

2. Click a template in the list on the left. To see a preview of the template, click **Preview**.

3. Select the music you'd like to have accompany your intro from the list on the right. To hear a sample, click **Play**.

4. Enter the 5 messages you want to "fly" in during your intro.

5. Choose a background color by clicking the color button and choosing one from the palette.

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6. To see how your intro looks, click **Preview My Intro.**

Advanced Site Intros

The **Advanced Intros** in XSites let you build a slide show full of your own images, text, timings and animation – all without prior knowledge of Flash programming or anything beyond basic computer skills.

Here's how you do it:

1. First, gather together the images you wish to use and have some idea of the text you want with each image. If possible, save all of the images in one directory on your computer's hard drive.

2. Now, click **My Intro** in the **Design** menu of the XSite Wizard, then click **Use advanced intro options**. You'll see a grid with any previously created intros. (If this is your first time for your site, the grid will be empty.)
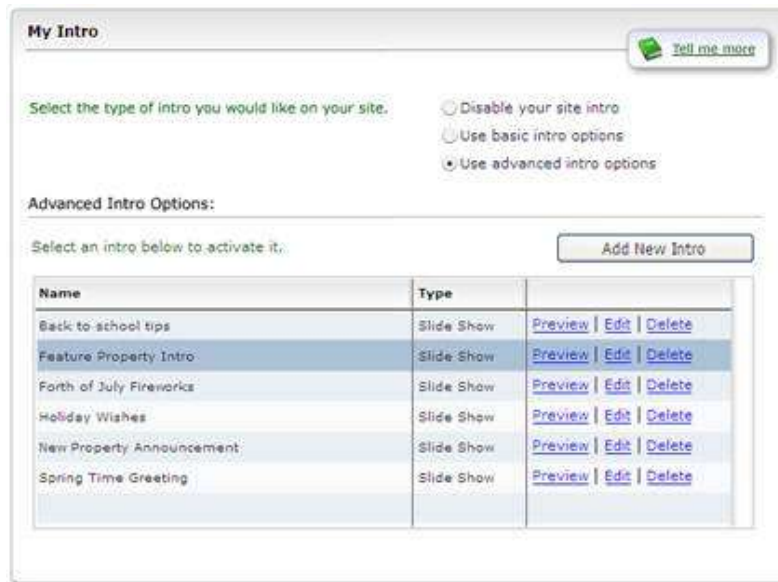
3. Click **Add New Intro to open** the **XSite Presentation Builder**. This is a simple 5-step wizard that leads you through the creation process. To move through the wizard, just complete each screen and click **Next.** At any time, you can click **Back** to return to the previous step.

4. The first step is to came the intro. This is only for your internal use, so you can call it whatever you like.

5. Next, choose a background color. We give you choices that match your site, but you can pick anything you want by clicking the color swatch on the right for **Pick a new color**.

6. Choose your background music. To hear a sample first, click **Play**.

7. Now, add a slide for the first of your images. Click **Upload Image, t**hen, click **Browse** to find and select the image on your system and click **Upload**. Repeat this process to upload all of the images you'd like to use in your Intro. Once the images are loaded, continue with the following steps for each image.

8. First, decide how long you want the image displayed by changing the number of seconds next to **Display Time**. Be sure to add time in for any animation for the image and text.

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9. Now, enter the **Caption** to go with the image. After typing the caption, you can drag it to another location on that slide. Just click on the caption text in the slide preview and move it.

10. To customize your caption further, click **Advanced Options**.

   o You can select a new font for the caption and how you want its presentation animated – i.e. fade in, fly in, etc.

   o You can customize the animation, deciding if it affects individual words or letters and what happens to each word or letter.

   o Click **Preview** once you've selected your options. While getting familiar with the intro builder, you'll certainly want to try the all the options to see what you like the most.

   o Click **OK** to save the options for that particular slide's caption.

13. In the slide preview at the bottom of the window, you'll see a button with **Fade** on it. A fade-in is the default animation for your slide, but you can click the button and choose a different transition for the slide.

14. While choosing the transition for the slide, you also choose an additional effect to be used on the image as it comes into view.

   o To sample the different effects and transitions, just choose one and click **Preview**.

   o If you want to use the same transition and effect for all slides, just mark the box at the top of the Slide Transition dialog for **Use for all slides.**

   o Click **OK** when you've chosen your slide transition.

15. Click **Next** when you are through adding slides. You can now choose to preview the presentation, go back to a particular piece of the presentation or click **Save & Close** to go back to the wizard.

When you are through building your intro, be sure to select it from the list. Then click **Save** to make it live, or just click **Next** to save the changes and move on to the next step in the wizard.

Site Sounds

Just as retail stores, why not have some have background music on your site to help set you apart from he crowd.

1. First, select background music that you want to play when someone is viewing one of your site's pages. To sample a song, select it and then click **Play**.

2. Now, choose sounds for your buttons. This sound plays anytime a site visitor's mouse moves over them.

💡**Hint:** If you enable sounds on your XSite, an On/Off "toggle link" is automatically placed at the top of your pages so site visitors can turn the music off. The Button Sounds, however, will continue to be in effect.

Company Information

In this step, you should provide as many methods as possible to contact you, and make sure everything is up to date. The information you enter here gets merged into other areas of your site.

• Whenever you change something in this screen, you immediately have the ability to run a **Search and Replace** to update every page of your site with your new information.

• Use the **Site Footer** tools to add these contact methods to the bottom of every page on your XSite.

• The **My Content** list has a **Contact Us** page that automatically includes this information.

My Content

Your XSite allows you to include as much information on your website as you desire. We've included a number of pre-written documents to get you started. Also, there are mortgage calculators and professionally developed videos to keep your visitors interested. But beyond that, you can create as many **Custom Pages** or **Listing Pages** as you feel are appropriate to your site.

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This step of the wizard is divided into 5 sections:

- **Provided Pages** – over 50 professionally-written pages of content to educate visitors on the ins and outs of buying and selling homes.

- **Mortgage Calculators** – 17 different calculators to help your clients understand the financial options available to them.

- **Video Pages** – informative and engaging videos provide your site with a sophisticated edge.

- **Your Custom Pages** – create as many custom pages as you like, to provide localized information, link pages or whatever you need.

- **Listing Pages** – the heart and soul of your real estate web site, you can create listings pages for any group of properties in your portfolio.

Note: See the **Content Editor** section for more information on editing the content of any of these pages.

Organize Content

This is where you decide how links to the content on your site are organized. Simply drag and drop the links into the order in which you want them to appear on your site. Just click a page and - while holding down the mouse button - drag it up or down. Then let go and it will go into place.

- The **Primary Navigation** items should be your most important links – the ones you want people to see first.

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- Your **Secondary Navigation** should have some organization regarding the content of the links. For example, group the links pertaining to Home Buyers, Sellers or other topics.

- Use the button separator item to add space between buttons and segment items so they aren't all run together

- You can create groups within your **Secondary Navigation** by clicking the arrows to indent particular button names.

Creating Fly-out Menus

It's easy to create fly out menus within your secondary navigation bar that appear when users move their mouse over a particular item. This is a great way to enhance your site by providing a lot of relevant information for your clients without cluttering your site with too many buttons.

To create fly out menus:

1. Click and drag one button item on top of another button item in the **Secondary Navigation** area.

2. When the **Secondary Navigation** button that you want to turn into a fly out menu turns dark blue, drop the button item and it automatically creates a fly out menu.

3. To view the items in your fly out menu, simply click the **+** symbol and the menu items within it are displayed below that button item.

Site Footer

Your site footer appears at the bottom of every page on your site.

- **Contact Information** - Click the check box for which contact methods you want shown. The content for these items is configured in the **Company Info** screen.

- **Site Navigation** - Add links to particular pages on your site, making them easier to find. After enabling the option, click **Customize** and mark the pages you want to appear at the bottom of every page. For best results, just mark the important ones.

- **Build your Own Site Footer** - If you want a completely custom footer that you control, mark the **Include a custom footer on my site** option. Then, click **Customize** and create the web page that you want to append to the bottom of your site. For more information about using the editor that appears, see the **Content Editor** section of this user's guide.

- **Other Prefs** - Mark the final option to add a link to the login page of your site to your footer. You and your staff may find this easier than typing the web address followed by "/admin" – especially if you use your own site as your home page.

When finished, click **Save** to make your changes live or click **Next** to continue through the Wizard.

Site Summary

When you first order your XSite, we don't "publish" it until you've visited this page and clicked **Launch My XSite**. After you've published your site, this page isn't really necessary except to provide information for your admin links.

Extra Tools

This collection of tools can help you manage your domain names, animate your site headers, search and replace text throughout your site and manage the documents, graphics and other files you have uploaded.

Animating the Site Header

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Note: Header animations only work with text company names. If you're using a logo file to display your company name, you won't be able to use this feature to animate it.

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10. Now, under the **Animation Settings** section, select the various options for the type of animation, target, direction, effect, and timing.

11. As you choose an animation tool, additional options appear below. For example, if you choose the **Fly** animation, a box appears allowing you to select which area of the screen you want the text to "Fly in" from.

12. For a **Target**, you can choose either the **Entire Word**, which animates your company name as one block, or **Each Letter**, which animates each letter separately.

13. Naturally, you'll want to experiment with all the options to find the effect that's right for you. To see how the options you've chosen will look, click the **Preview Animation** button to see it in action.

14. Once you've decided on the animation, just click **Save**.

If you want to turn off the **Header Animation**, just return to this part of the wizard and select **None** for the animation type.

File Library

This tool allows you to upload and manage the files - such as digital photos or online documents - which you intend to use on your site.

Creating Web Pages

To Add a File to Your File Library:

1. Open the **XSites Wizard** and click **File Library in the Extra Tools menu.**

2. Click **Add New File**. Then, click **Browse**.

3. Locate the file on your hard drive - this may be a PDF, a JPG, MP3 or any file type you wish to have accessible on your XSite – highlight it and click **Open**.

4. You'll see its name in our XSite file upload screen. Click **Upload**.

5. Stand by as the file is uploaded and you'll see it in your files list.

You can preview any file you've previously uploaded by clicking the filename and then clicking **Preview Selected File**.

To Delete a File from Your File Library:

1. Open the **XSites Wizard** and click **File Library in the Extra Tools menu.**

2. Select a file in the list, or use the Ctrl key to select multiple files, then click the **Delete Selected File(s)** button.

3. Click **Yes** to confirm you deletion.

Note: Deleting files from your library is permanent. There is no undo or trash can feature to retrieve deleted files.

Search & Replace

XSites contain a great feature that can run a search and replace on multiple pages at one time. This is useful for replacing generic phrasing in our provided content with something more personal.

1. Click **Search & Replace** under the **Extra Tools** section of the wizard.

2. Enter the phrase you want to replace.

3. Now, type what you want it replaced with.

4. Select the pages on which you want your new text. You can use **Select All** to mark everything. There's no "undo" on the **Search and Replace** so you'll want to be sure about your new text.

5. Click the **Search & Replace** button.

Like all XSite functions, your changes are "live" instantly.

Creating Web Pages

While your XSite comes with a wealth of professionally written content, chances are you're going to want to create additional pages of content that are particular to your business or location. You can create as many custom pages on your XSite as you desire, and put anything on them.

1. From the **My Office** screen, click the **XSite** button to open the **XSite Wizard**.

2. Next, click the **My Content** option in the **Content** menu on the left.

3. Click the **Your Custom Pages** tab, then click the **Add New Page** button near the bottom.

4. Now, create your pages using any of the tools provided in the Content Editor. You can either type information from scratch, or copy and paste it from an existing source. Click **Save** when your page is complete.

5. Your new page should now be shown in the list of custom pages. Click the check box next to the new page to turn it on, then click **Save.**

Note: If you've enabled the alternate language options, you can create custom pages in any of those languages. Look for the drop down menu in the upper left corner of the Page Content Editor.

The Editing Window

The Editing window is broken into four sections:

- Page Information
- Page Content
- Other Page Options
- Search Engine Tools

Creating Web Pages

Page Information

The first section of the page editing screen allows you to enter:

- **Button Name** - Enter the text you'd like to have appear on the button in your navigation menus.

- **Web Address** - Provide an address for your page. This is added to the end of your domain name to create the complete URL (i.e. www.baytownproperties.biz/home).

💡**Hint:** Make sure you use a short, easy to type web address name, if you intend to use this page in your print advertising.

In addition to these two fields, the page information area provides some critical data on the number of visitors this page has had in the last 30, 60 and 90 days, plus the number of leads which have been generated by any lead capture forms you've embedded on it.

Other Content Options

When creating a new web page from the My Content section of your XSite, you also have several options for adding additional items to those pages. Below the Page Content Editor area is a series of **Other Content Options**:

- **Dynamic Content -** Click this option to add content such as a news feeds, current interest rates, lead generation forms and more as a sidebar to any page. To select specific content, click the **Customize** button. Select the items you want to appear and click submit.

- **Lead Capture** – This option lets you place a feedback form on your page. Clicking the **Customize** button allows you to select a form from your Form Manger. See the Lead Capture Tools section of this manual for more information.

- **Listings** – You can add a filtered listings grid to any page by selecting this option. Click the **Customize** button to select which of the properties in your listings database should be included.

- **RSS Feeds** – RSS (Really Simple Syndication) is a technology that allows you to include dynamically updated news feeds from other websites into your site. Clicking **Customize** allows you to add RSS feeds into your page from one or many websites of your choice. For a full description of RSS and its value on your XSite, see Tech Doc 7008.

- To the right of these options are a series of drop-down boxes that let's you organize where on the page each of the items you've chosen will appear. For example, if you want your listings to appear at the top of the page instead of the page text, click the Customize button, then select **Listings** from the first drop-down menu.

Creating Web Pages

Including Dynamic Content

Sometimes the best way to attract potential clients is to add a little flavor to your XSite. One of the best ways to do this quickly and easily is using the Dynamic Content tools pre-built into the Page Content Editor. To add Dynamic Content to any page in your XSite:

1. Edit a page into which you like to add Dynamic Content.

2. In the Page Content Editor window, scroll down to the **Other Content Options** section and check the **Include Dynamic Content** check box.

3. Next click the **Customize** button that appears to the right of the **Include Dynamic Content** check box.

4. A new window appears and shows you a list of the available dynamic tools. To include any dynamic tool, simply check the box corresponding to each tool that you want. See below for a brief description of the available tools.

5. When you've picked all the tools you'd like, scroll down to the **Organize your Dynamic Content** section of the window and reorder their order of appearance from top to bottom by choosing the tools you would like to appear from the drop-down menus.

6. Be sure to click **Submit** when you're done.

a) Dynamic Content options

- **Today's Top Real Estate News** – You can add as many headline links as you want to your pages. Your XSite visitors can click these links to read the complete articles provided by **Inman News** from right within your site.

- **Today's Rates** – Displays the current 30-year fixed, 15-year fixed and 1-year adjustable interest rate, updated daily.

- **Mortgage Calculator** – Allows visitors to calculate a monthly payment amount, based on loan amount, interest rate and term of the loan.

- **Mobile Notification** - Allows visitors to send a text message to your cellular phone or mobile device by simply filling out a form supplied by this tool. Note that you must have Text Messaging with your cellular service provider or e-mail on your mobile device to utilize this tool.

- **Lead Generation Forms** - This provides a smaller version of the Lead Generation Forms option normally available in the **Other Content Options** section of the **Page Content Editor**. Note that you can only choose between 4 pre-built forms.

- **Dynamic Listings** - This tool displays any listings currently marked as Featured Listings within your **Listings Manager**. You can choose between the default listings presentation and an alternate version called "Mini-Browser Style." Sample pictures in the **Dynamic Content Editor** show you the differences between the two styles. To enable **Mini-Browser Style** simply check the **Mini-Browser Style** box and the **Dynamic Content Editor** then displays the alternate presentation style for you.

Including a Lead Capture Form

Sometimes the best use for a page in your XSite is to collect information from your prospects. Whether you want to tease your prospects with information they want by prompting them to fill out a form or you just want to make yourself available for contact, adding a lead generation form is the best way to get the information you need to do business.

1. While editing text on a page, click **Lead Capture in the Other Page Options section, then click the Customize** button which appears.

2. Now, you can select any of the forms from your Form Manager by selecting it from the first drop down list. For more information on creating forms, see the Lead Capture Tools section of this manual.

3. From the second drop down list, pick the Group in which you'd like the contact information from respondents placed.

4. Click **Save** to add this form to your page.

Creating Web Pages

Including Listings

Any of your XSite pages can have a listings grid displayed on it with just a few clicks. To add listings to a page from the **My Content page in the XSite Wizard:**

1. Select the tab containing the page you want to modify (**Provided Pages**, or **Custom Pages**), then click the name of the page to which you want to add a listing grid.

2. When the **Page Content Editor** window opens, scroll down to the **Other Page Options** section. Click **Listings**, then click **Customize**.

3. Select from the options presented to filter out just those properties you want displayed on this page.

4. Click the **Save** button to lock in your options.

Repeat these steps for any other pages on which you'd like property listings to appear.

Page Search Engine Tools

Below the Page Content are several tools to help you optimize your page for optimum search engine placement.

- The **Page Title** box allows you to edit the text that appears in the title bar of the browser when you visit your site. This page title is critical since this is the text that is used by default when someone bookmarks your site.

- The **Page Keywords** and **Page Descriptions** information is used by search engines that index your site. Make sure the keywords you place in this field are relevant to the content of the page. Stuffing irrelevant words in the Keywords field won't help with search engines, and may lead to negative rankings.

To the right are a series of check boxes the tell your site how to treat this page when search engines "crawl" your site:

- **Submit your page to search engines** - This page is submitted to all the major search engines when you use the XSite's Page Submissions tool.

- **Add this to your Google Site Map** - If you're using the Google Sitemaps feature, this selection adds this page to those that Google is instructed to index.

- **Add this to your Yahoo Site Map** - The same as the Google tool, only for the Yahoo system.

- **Add this page to XSites Site Map** - Adds this page to the Site Map content page.

- **Create a link to this page in your XSite Footer** - Adds a link to this page to the Site Footer which appears at the bottom of all your pages.

To learn more about the significance of your Keywords, Page Title, and Description click the link below.

- [Keywords, Page Title, and Description](#).

- [Search Engine Optimization (SEO)](#)

- Your XSite's Search Engine Tools

Creating Buttons to External Web Sites

Some times the best way to provide the information your clients need is to simply refer them to information in another website. Let's face it, since time is money it's best not to reinvent the wheel if you can just link to the information that's been provided. To provide a button on your XSite that links to another site:

1. Click the **Link to External Page** button in the **Custom Pages** tab.

2. Type the **URL** (web address) for the website with which you want to link.

💡 **Hint**: You can copy the URL from the **Address** bar of your web browser with the page open by highlighting the entire entry after the http:// portion of the URL, and then selecting **Edit** on the menu bar and choosing **Copy**. Once you have copied the URL, right-click in the URL field of the **Page Content Editor** window and select **Paste** from the menu that appears.

3. Choose from the available options described below to determine how this website will open the external website. You have several options to

The Content Editor

choose from when linking to external web pages from your XSite. These include the following:

- o **Open in Current Window** replaces your entire XSite "shell" with the contents of the new page.

- o **Open in a New Window** launches a new browser window and puts your XSite in the background.

- o **Open in a Frame** keeps your header and colors, but loads the content below it.

- o **Open in an iFrame** keeps your XSite header and navigation panes and loads the content in a small, scrollable window.

Be sure to click **Save** when you are through.

The Content Editor

To edit the content pages of your site, or your site footer, XSellerate ads or many other tools, these same **Content Editor** is used.

To open a web page in the Content Editor

1. Log into your XSite and click **XSite** in the main toolbar.

2. When the XSite Wizard loads, click the **My Content** button in the Content pane on the left.

3. In the list of pages that appears, find the page you wish to edit. Remember that there are several tabs that list different types of pages.

4. Click the name of the page or the pencil icon to open that page in the Content Editor.

The Content Editor is basically a word processor, where you can enter, lay out and format any content you'd like to appear on your website. As with any word processor, you'll find tools to cut, copy, paste, change fonts, insert pictures, lay out tables, create hyperlinks and many other features.

Here are some items to keep in mind as you're editing your content:

- At any time, you can revert to the previously saved version of your content by clicking the **Revert** button.

- To start from a clean slate, click the **Blank Page** button.

- Above the text editor are rows of buttons, each with its own function. These are very similar to the buttons found in most popular word processors. To learn what a certain button does, just hover your mouse over it, or click here for a description of each tool.

- While HTML is designed to be a tool-independent language, the reality is that many web content tools (including Microsoft Word) use codes and formatting that can cause undesired results when pasted into your XSite pages. Fortunately, XSites come equipped with functions specifically designed to help you paste in content from other applications with minimal formatting conflicts. Look for the special buttons in the tool bars to use these features.

- The toolbar also comes equipped with a series of paragraph and text (CSS) styles that you can apply to your text as a means of quickly formatting it with the same text formatting your XSite uses. Just choose the format you want out of the drop-down lists to automatically apply it.
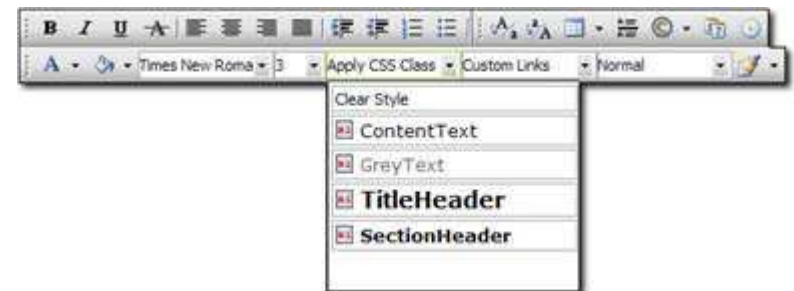

- The top toolbar at the bottom of the screen allows you to change the current view of the page to full screen, view or edit the raw HTML, change the zoom level of the page, spell check it, review the word count etc.

The Content Editor

- The bottom two toolbars at the bottom of the screen present you with an overview of the selected HTML element's properties and a HTML element tree. If you're not altogether familiar with HTML editing, you may at least find that you do not have to right-click to change the properties of an image or other item as often since they appear at the bottom of the screen. If you're an HTML guru, you may be familiar with both of these tools as they are excellent ways to quickly edit HTML in WYSIWYG (what-you-see-is-what-you-get) mode.
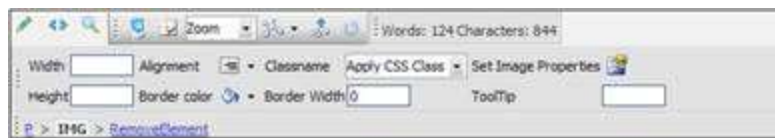
- If you're editing one of your XSite's content pages, and have enabled the multilingual features of your XSites, the drop-down menu in the upper left allows you to select which language you're going to edit.


- Likewise, for XSite content pages, you can choose a "template" for the page by selecting one from the Pre-written content drop-down menu. Several of our provided pages have a choice of pre-defined layouts and text to choose from.

Formatting Text

In the **Content Editor,** text can be edited as you would in a word processor. Just begin typing, and use the formatting buttons found in the toolbars to enhance your text. For help with any of the buttons, just hover your mouse over it and a description appears. Or consult the Button Help page of this guide.

- To modify text you've already typed, first select it, then click any of the buttons to apply the format to that text.

- To insert "special characters (such as © or ¾), click the button that looks like the copyright symbol. Then select the desired symbol from the list.

- The font list pull down menu is limited to certain standard "web" fonts that the vast majority of internet users have installed by default on their systems. This keeps you from using a font that would not display properly on a computer that doesn't have a particular font installed.
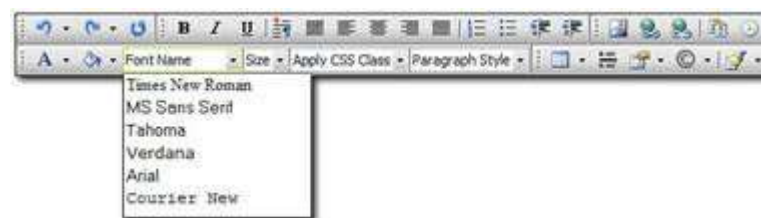
- The editor also comes equipped with a few custom paragraph and text styles that you can apply to your content. Just select the desired text and choose a format from the drop-down list.

Note: While this feature uses Cascading Style Sheets (CSS), you are currently limited to the styles included with the editor.

The Content Editor

Find & Replace

The Content Editor has it's own, built-in Find and Replace feature that let's you change any content within a specific page. This should not be confused with the site-wide Search and Replace feature found in the XSites Wizard.

- In the **Content Editor**, click the **Find and Replace** icon in the toolbar.

- To **Find** certain text on your page, click the **Find** tab, then type the desired text in the File text box. Choose your **Search Options**, then click **OK**.

- To **Replace** certain text on your page with different text, click the **Replace** tab. Type the original text in the Find text box, then the new text in the Replace with box. Set your **Search Options**, then click:

    o **Find Next** to locate the next instance of the original text. Once found, click **Replace** to replace it.

    o **Replace** to find and replace the first instance of the text.

    o **Replace All** to search the entire document and replace all instances of the text with the new item.

    o **OK** to accept your changes.

    o **Cancel** to terminate the process and undo your changes.

Hint: The Find and Replace feature is particularly powerful when used in the HTML view of your content. While the toolbar is not visible in this mode, you can press Ctrl+F to bring up the tool.

Adding & Modifying Images

A graphic element on a page adds balance and makes it eye catching. Your XSite comes stock with a library of images and "jelly buttons" that you can use, but you can also add your own images via the File Library. To add your own image to your XSite page…

1. In the **Content Editor**, click the image icon in your toolbar.

2. You're presented with a list of files (if any) that you've uploaded to your site. Click the file you want to insert into your page.

3. If you need to upload an image or images to your site, click the **Upload Files** tab to do so.

4. A preview of the image appears in the box on the right. Verify that the image is indeed the one you want to insert. If you need to adjust the image preview so that it's smaller or larger, you can use the zoom buttons above the image preview. If you're unsure which button is which, just hover your cursor over each button for a description of how it zooms. Options are:

    o Best Fit

    o Actual Size

    o Zoom In

    o Zoom Out

5. Type a short description of the image into the **Image Alt Text** field. This description appears whenever viewers hover their cursor over the image and can improve your search engine ranking (when combined with other techniques in your site) as search engines can read this text.

6. Finally, click **Insert** to place the image into your page.

Once an image is in your web page, of course, you may also want to do some of the following things:

- Click the **Hyperlink Manager** icon to add a link into the image.

- Click an image and then press **DEL** on your keyboard to delete it.

- Click one of the image handles and drag it across the screen to resize the image as it appears in your page.

- Create a thumbnail (miniature version of the image) for the image by clicking the **Image Manager** icon and using the **Thumbnail** button.

The Content Editor

Resizing Images

To resize an image you've added to your web page:

1. In the **Content Editor**, click the image you want to resize and note the "handles" that appear on its sides and corners.

2. Click one of the handles in the area where you want to begin resizing and drag the image handle in the direction you want to enlarge or shrink the image. For example, to make the image wider, "grab" the handle on the right side or left side of the image and "pull" it so that it "stretches" or resizes into a wider image.

💡**Hint:** While clicking and dragging is the easiest method of resizing an image, there is the possibility that you'll skew or scrunch your image while you're dragging. To ensure that the image is scaled properly in both dimensions, use the Image Properties tool instead.

💧 **Note**: This process lets you shrink images so they appear smaller on screen. However, it does not decrease the actual file size. To decrease an image's file size, you need an image editing program and may need the assistance of a professional image designer.

Image Properties

There are several options available to change how your images are treated on a page. For instance, you can force the text to flow around your images or add a border to them. To change an image's display properties:

1. In the **Content Editor**, click on the image to select it. A panel appears at the bottom of the editing window, allowing you to set certain features.

2. Click the **Set Image Properties** button for more options, or right-click the image and choose **Set Image Properties**.

3. Change any of the options to create the desired effect and click OK when you're finished.

Here's a brief description of your options:

- **Border Width** - To add a border to your image, type a number into the **Border Width** text box (or use the plus and minus buttons). The higher the number, the thicker the border. Enter a 0 to ensure that your image has no border.

- **Border Color** - If you have selected a Border Width of at least 1, you can also change the color of the border. Just select the desired color from the drop-down menu.

- **Image Alt Text**– Enter text here that you would like displayed whenever a users hovers their mouse pointer over the image. It can be a caption, a description, or (if the image is used as a hyperlink) instructions on what to do.

  In addition, this text appears in those rare instances when a user's browser doesn't display images (on a mobile device, for example).

- **Long Description** – Enter text here that you would like displayed whenever a user views your pages using a "handicap enabled" browser. These browsers will "read" the text to the site visitor.

- **Image Align** – The Image Align feature allows you to control how the Image interacts with surrounding text on your web page.

  Select the **Left** or **Right** option to move the image to one side or the

The Content Editor

other and wrap the text around the image.

Clicking the **Top**, **Center** or **Bottom** option places the image in line with your text, and positions any text to the left or right at the top, center or bottom of the image.

- **Image Src** - This option displays the URL pointing to the source file for the image. Since XSites host all your image files, you won't need to use this tool.

- **Spacing** – Horizontal and Vertical Spacing allow you to add empty space around your images so that any text does not display flush against the image. As you increase the number, the space gets larger. Clear the fields or enter a 0 to eliminate any space.

- **Size & Constrain** - Use the Width and Height text boxes to change the size of your image. Enter the desired dimensions in pixels.

To ensure that your images don't get skewed or scrunched, use the **Constrain** tool. If the chain link is connected, when you change one dimension, the other changes proportionally. Click the chain link to switch between constrained and unconstrained dimensions.

Of course, you can also resize an image by clicking and dragging it.

Image Thumbnails

Thumbnails are miniature versions of an image you've made available on your website. In most cases, they're used in image galleries as a means of making the page load more quickly as smaller image files do not take as long to load. The idea of the image gallery is that your viewers click the images in which they are interested to see the larger versions. If you decide to build an image gallery in your XSite, need to create an image thumbnail for another reason, or just need to resize an image (file size and all), you can use your XSite's built-in thumbnail creation tool to do the job. To create an image thumbnail or resize an image:

1. In the **Content Editor**, click the **Image Manager** icon in your toolbar.

2. You're presented with a list of files that you've uploaded to your site. Click the file you want to resize or turn into a thumbnail.

3. In the toolbar above the image preview, click the **Create Thumbnail** button to the far right.

4. The preview is replaced by the **Create Thumbnail** screen asking for details about your new image. A suggested file name appears in the **New Image Name** field. If you're satisfied with this name, continue filling out the details of your thumbnail (or resized) image. If not, type in a new file name for your scaled image. Keep in mind that if you're resizing an existing image, you can either create a new file sized to fit your specifications or you can overwrite the existing file in your File Library by changing the file name to the same name as the original file.
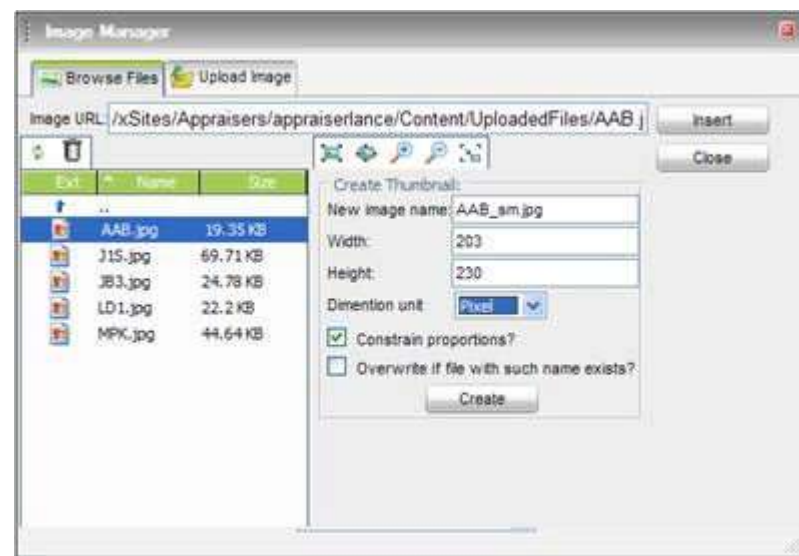
5. Decide whether you want to scale your image by percent of its current size or by its pixel width and height. Once you've decided, choose the appropriate option from the **Dimension Unit** drop-down menu.

The Content Editor

6. If you want to ensure that you do not stretch or skew the image so that it appears distorted, check the **Constrain Proportions** box.

7. If you want to ensure that any existing file with the file name you specified earlier are overwritten by the new file, check the **Overwrite if File with Such Name Exists** box.

8. Finally, type the width and/or height to which you wish to scale the image. As you do this, keep in mind whether you're scaling by percentage or by pixel width/height.

9. When finished, click **Create** to create the image.

The scaled image or thumbnail is automatically added to your File Library. At this point, since the Image Manager remains open, you can continue to insert the new scaled image into your page or continue creating thumbnails as you see fit.

Image Maps

Image Maps are handy tools that you can create to break down an image into multiple sections, linking each section to something else in your site. One illustration of an image map is a picture of the United States on a website. If you wanted to create an image map out of the full image of the US and link each state to a page about that state, you'd break the image down into sections (states in this case), and link each section (or state), to a page about that site. Before you begin working on your image map, you need to collect several resources, including:

- An image to use as an image map

- A list of links you want to insert into your image map

- An idea or list of areas in the image into which you want to embed your links.

1. In the **Content Editor,** right-click the image into which you wish to embed links and select **Image Map Editor** from the menu that appears.

2. When the Image Map Editor appears, decide which type of image section will better suit your needs and mark the corresponding choice – **Rectangle** or **Circle.**

3. Now, click the image where you'd like to begin drawing and drag a rectangle or circle (depending on your choice) around the section you wish to break into a link.

4. Once you're satisfied with the size of the circle or rectangle, release your click and then click the blue area that appears to move it to exactly the location on your image where you want it. If you need to work with great precision, you can move the area by increasing or decreasing the its distance from the **Left** and **Top** of the image using the corresponding fields on the right.

5. If you need to adjust the size of the area, click the red square attached to the area and drag it until the area is the size you desire. You can fine tune this sizing process by typing the exact **Width** and **Height** into the corresponding fields on the right.

6. Once you're satisfied with the size and placement of your image section, type the URL (or web address) with which you want it to link into the **URL** field provided.

7. Pick a **Target** from the menu provided to determine how you want the link to open. Options are:

The Content Editor

o **New Window** - Opens the web page in a new window

o **Same Window** - Opens the web page in the main window

o **Frame -** Opens the web page in a frame - keeping just your site header intact.

o **IFrame** - Opens the web page in a frame - keeping just your site header and side navigation intact.

8. Type a short **Comment** in the available field to indicate what this link does.

9. When finished, click **Update Area** to apply your change to the area you've created.

10. Continue creating new areas by repeating steps 6 – 13 until you've completed your image map. If you need to remove an area from your image map, click it and then click **Remove Area**. If you need to remove all areas from your image map so you can start over, just click **Remove All**.

11. When finished with your image map, click **OK** to apply it to your web page.

Using Clip Art

Your XSite includes a stock set of provided clip art that you can use in your web page. If you want to add some flare to your site and you don't already have the fancy buttons or clip art images you need, consider using some of the provided clip art. To insert clip art into your web page:

1. In the **Content Editor**, click the **File Manager** icon to view and place clip art into your page.
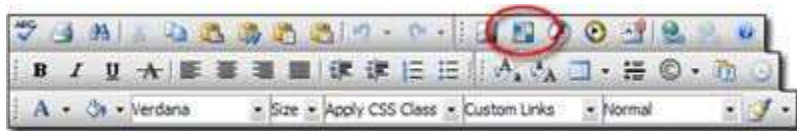
2. In the screen that appears, click each clip art item's file name to view a live preview of it in the **Image Preview** box on the right.

3. When you find a piece of clip art that will suit your needs, click it and then click **Insert** to place it in your page.

Uploading Files

Your XSite has a built-in **File Manager** that provides access to your files as you edit a page. This tool can be used to upload:

- Images for use in Content Pages
- Images for use in Listings
- Documents which visitors can download
- Multimedia files

Note: While you can access the File Manager tool to upload all types of files, you can only view those files from their respective managers. For instance, if you're uploading image files, you could upload them from the Media Manager, but you would not be able to view them unless you opened the Image Manager.

While you can always upload and manage the files in your XSite's File Library, there are several benefits to using this tool.

- You can upload files on-the-fly, so that you don't have to remember to upload them before you use them in your web page.
- You can upload multiple files at once.

The File Manager is available from two places:

- From the Content Editor

   1. Log into your XSite and click **XSite** in the main toolbar.

   2. When the **XSite Wizard** loads, click the **My Content** button in the Content pane on the left.

   3. In the list of pages that appears, find the page you wish to edit. Remember that there are several tabs that list different types of pages.

   4. Click the name of the page you'd like to edit.
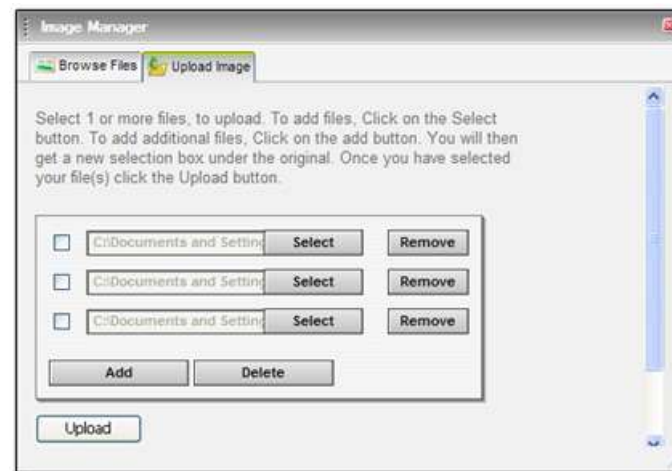
The Content Editor

5. Click the file management button that corresponds to the type of file(s) you wish to upload.

- From a Listings page

  1. Log into your XSite and click **Listings** in the main toolbar.

  2. When the **My Listings** page appears, locate the desired listing and click the **Edit Details** link. (Or, click **Create a New Listing**.)

  3. Click the **Photo Manager** button from the **Manage Your Listing** screen.

  4. **Click Add** to bring up the **File Manager**.

When the File Manger appears, follow these steps to upload files:

1. Click the **Upload** tab. The exact tab name varies depending on the type of file manager you selected. For instance, in the Image Manager, the tab name is "Upload Image."

2. In the screen that appears, use the available fields and buttons to select the file or files you wish to upload. Options are:

   o To select a file to upload, click the **Select** button and browse to the file you wish to upload.

   o To upload an additional file, click **Add**. Then, click **Select** and browse out to that next file. Repeat this process until you've selected all of the files you wish to upload.

   o If you need to remove one of the slots for a file to upload, click **Remove** beside the slot you wish to remove.

   o To delete a file from the upload process, check the box beside it and click **Delete**.

3. When you've selected all the files you wish to upload, click **Upload**.

Your files are immediately uploaded to your site and a progress bar appears to show you the progress of the upload.

Note: Depending on the limitations of your Internet Service Provider (ISP), it is possible that this process may time out. Generally, this occurs whenever you choose to upload too much information at one time. To address this problem you need to adjust the total file size of your upload. If you attempted to upload multiple files, try uploading again with fewer files. If you attempted to upload one file and its size caused a timeout, try reducing the file's size. Otherwise, you may need to try uploading the file from a computer with a faster connection or with an alternate ISP.

The Content Editor

Adding Tables

Tables are a valuable element when laying out a web page. The can be used to:

- Build columns of numbers or data

- Control how text flows around an image

- Place text or images in specific places on a page

There are two ways to add a table while in the Content Editor:

The Basic Mode allows you to drag and select rows and columns. Just click the table icon in the tool palette, then drag your mouse to select the number of rows and columns you'd like to include in your table. You can now enter data into any of the cells in your table. To modify the design of the table, right click anywhere in the table and choose from the options displayed.

The Table Wizard gives you more control over the initial creation of your rows and columns. Click the table icon in the tool palette, then choose the **Table Wizard** item at the bottom of the menu.

- Use the **-** and **+** buttons next to the **Columns** and **Rows** labels to add or remove columns from your table.

- Use the column or row span **+** button to make a particular column or row span others. For example, you may wish to have the top row of a table "span" all the other rows to center a header in that cell.

- Click the **Table Properties** tab to specify the overall look of the table – size, background color, border size, cell spacing.

- The **Cell Properties** tab allows you to specify size, background color and alignment for each cell.

- The **Accessibility** tab allows you to enter information about your table that will be read to viewers using a handicap-enabled browser.

When you are through with the **Table Wizard**, click **Insert** and your table will be drawn on your web page.

Hint: You can create a new table inside the cell of an existing table. This can be particularly useful in laying out complex information on a web page. Just place your cursor in any cell of a table, then use either method described above to insert that table.

Hint: Rather than creating a table from scratch in the editor, you can also copy and paste tables from Microsoft Excel or Word. Most of the formatting will be preserved, including borders, text, numbers and cell color. Formulas, however, will not be pasted.

Modifying Tables

Once tables are on a page, you can add information by clicking in any cell and typing. Or, you can further modify your tables using any of these tools:

- Click on any gridline on a table to select it, then drag the handles to resize the entire table. You cannot drag individual cell lines.

Hint: By default, a new table has its border width set to 0. You can see the table in the editor with each cell outlined with dotted, grey lines. You can turn these lines on or off by clicking the Show/Hide Border button at the bottom of the editor.

- Right-click any selected table and choose **Set Table Properties** to further modify it.

- To remove a table completely, select the table, right-click and choose **Delete Table** from the popup menu.

Note: As you work with your table, note the grey area at the bottom of the editor. This displays several options for modifying your table without opening the Table Properties dialog box.

The Content Editor

- Click in any cell, then right click to display a pop-up menu which allows you to:

  o Insert columns or rows

  o Merge cells together (you must select two or more cells first)

  o Split cells to add additional rows or columns

  o Delete a row, column or cell

  o Open the Table or Cell Properties dialog

 o Turn cell borders on or off
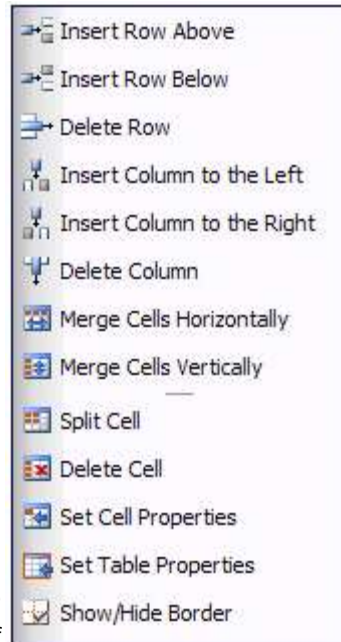
Cell Properties

The Cell properties dialog box allows you to adjust how each individual cell - or group of cells - will appear. Click in the cell you wish to modify, or click and drag to select multiple cells, then right click and choose the **Set Cell Properties** item from the pop up menu.

- **Content Alignment** - From the drop down menu, select how you'd like the text in your cell to line up. You can select any combination of the top, middle, bottom, left or right.

- **Background color or image** - Each cell can have its own background color. Just select the desired shade from the drop down menu. The Background Image option is not supported on XSites.

- **Dimensions** - Set the desired Height and Width for this cell. You can enter the amount in Pixels or as a percentage of the total size of the table. To enter a percentage, just type the percent sign (%) after the amount (i.e. 25%).

- **No Wrapping** - This turns text wrapping on or off. If this box is checked, text entered into a cell will cause the cell to grow, rather than wrapping to a new line.

- **ID & CSS Class** - These options are used for advance table editing and are not supported on XSites.

Table Properties

The Table Properties dialog allows you to adjust settings that affect the entire table, rather than just a few cells. Click anywhere in a table, then right-click and choose **Set Table Properties** from the pop up menu. If you need to adjust the number of rows or columns - or change the cell spanning - use the Table Design area which first appears. Or, click the Table Properties tab to make additional changes.
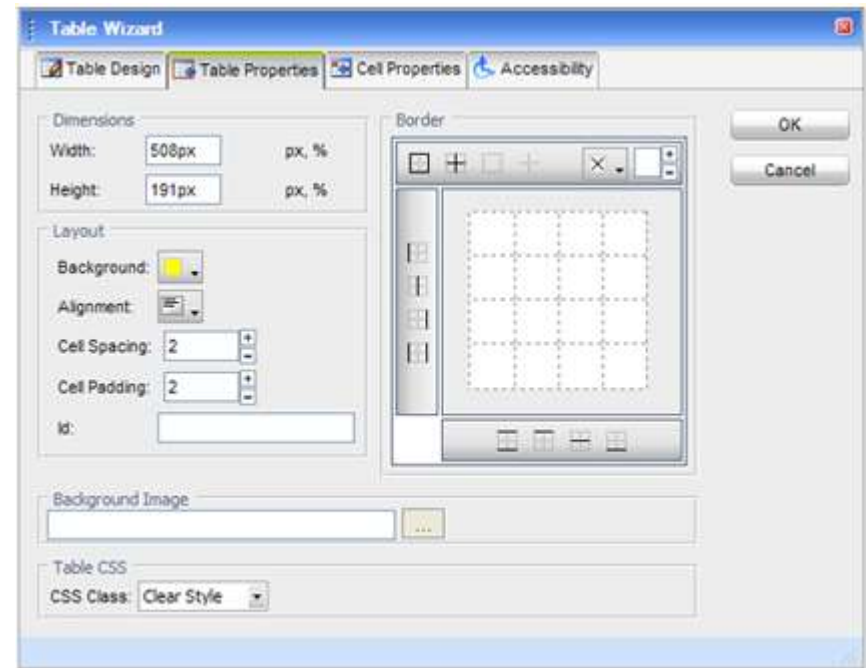
- **Table Dimensions** - Set the desired Height and Width for the table. You can enter the amount in Pixels or as a percentage of the total size of the page. To enter a percentage, just type the percent sign (%) after the amount (i.e. 25%).

The Content Editor

- **Background color or image** - A table can have its own background color. Just select the desired shade from the drop down menu. The **Background Image** option is not supported on XSites.

- **Alignment** - From the drop down menu, select how you'd like the text in your table to line up. You can select any combination of the left, center or right. You can further modify this option on a cell-by-cell basis.

- **Cell Spacing** - This refers to the amount of space between the borders of the cells. Use the + and - buttons, or type a number in the text field to set this dimension in pixels.

- **Cell Padding** - This refers to the amount of space between the border of the cells and the text contained in it. Use the + and - buttons, or type a number in the text field to set this dimension in pixels.

- **Borders** - Use the Border tool to set the width and color of the border lines. First, select a color from the drop down menus. Then, use the + and - keys to set the border width, in pixels. Now, click any of the border buttons on the top, left or bottom side of the screen to choose which border line you wish to apply. Notice that all borders must be the same color.

- **ID and CSS Class** - These options are used for advance table editing and are not supported on XSites.

Adding Hyperlinks

Hyperlinks are a great way to give readers a place to find additional information. Using your XSite's Hyperlink Manager, you can add a link into an image or text that's already in your page or just insert a new link (text and all) into your page.

There are several types of hyperlinks that you can add to your page's content, including…

- Links to other pages in your site
- Links to other web pages
- Links to files in your File Library
- Links to anchors you've placed in a page

- Links to an e-mail address

Note: This section shows you how to create links within your content. If, instead, you want to create a button in your XSite's menus that links to an external web page or other content, see the Buttons to External Web Pages section of this guide.

Adding Links to Pages in your Site

If you need to add or create a hyperlink in your web page to another page in your website, you can do so via the **Custom Links** drop-down menu in the Content Editor.

1. In the Content Editor, select the text (or image) you want the user to click.

2. Click the **Custom Links** drop-down menu in the main toolbar.
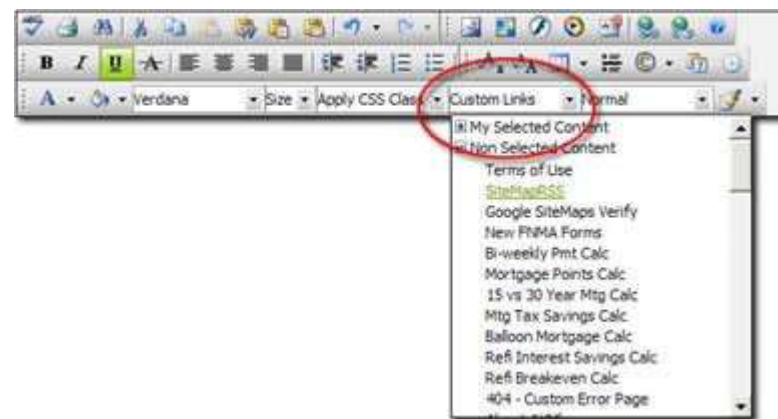
3. Click **My Selected Content** to expand the list of active pages on your site

-or-

Click **Non Selected Content** to expand the list of content pages available on your site, but that are currently inactive.

The Content Editor

4. Browse the list of available pages to find the page to which you want to link. When you find that page, click it to insert the hyperlink into your page, text, or image.

   Note: If you do not select text or an image in your page, the XSite Custom Links menu simply inserts the name of the page you want to link to as the hyperlink text in your page.

Adding Links to Other Web Pages

Linking to other pages outside of your website is simple with your XSite's Hyperlink Manager.

Note: This process creates a link within your content. If, instead, you want to create a button in your XSite's menus that links to an external web page, see the **Buttons to External Web Pages** section of this guide.

1. In the Content Editor, place your cursor where you'd like to insert the link. Alternately, if you want to turn some existing text or an image into a hyperlink, select the text (or image) you want the user to click.

2. Click the **Hyperlink Manager** icon (the one that looks like a globe with two enclosed chain links.

3. In the screen that appears, type or paste the URL (web address) of the page to which you wish to link into the **URL** field.

4. If you did not select text or an image in your page to turn into a link in the previous steps, type some text to use as the clickable link into the **Link Text** box. If you type nothing into the Link Text box, the **Hyperlink Manager** simply inserts the URL (web address) into your page as a link.

5. Choose a type of link to insert. In most cases, the default option of **http://** will suffice. All other options available are more advanced and require some knowledge of website technology.

6. Choose a **Target** from the drop-down menu provided. Options are:
   o **New Window** - Opens the web page in a new window
   o **Same Window** - Opens the web page in the main window
   o **Frame -** Opens the web page in a frame - keeping just your site header intact.
   o **IFrame** - Opens the web page in a frame - keeping just your site header and side navigation intact.

   Hint: If you're linking to another website, it's usually best to avoid opening the link in the Same Window. By doing so, your website disappears and is replaced with the site to which you've linked. This frequently means that you lost your customer to that site.

7. Finally, type a brief description of the link into the **Tooltip** field. This description then pops up whenever someone hovers the cursor over the link and provides search engines with one other piece of information they can use to rank your site.

8. Click **OK** to add your link to the page.

Adding Links to Documents

Your **File Library** can contain any kind of document you desire, including images, word processor documents, spreadsheets, PDF documents and more. You can then provide links to these documents in any of your site's content pages or XSellerate Ads so your clients can easily download them.

To add a link to a document in your file library, you must first upload it from either the File Library function, or from the Content Editor's File Manager.

To insert a link to a document:

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1. In the Content Editor, place your cursor where you'd like to insert the link to the document. Alternately, if you want to turn some existing text or an image into a link to a document, select the text (or image) you want the user to click.

2. Click the **Document Manager** icon (the one that looks like a globe with two enclosed chain links.

3. In the screen that appears, select the desired document from your File Library, or click on the **Upload Document** tab to upload a new one.
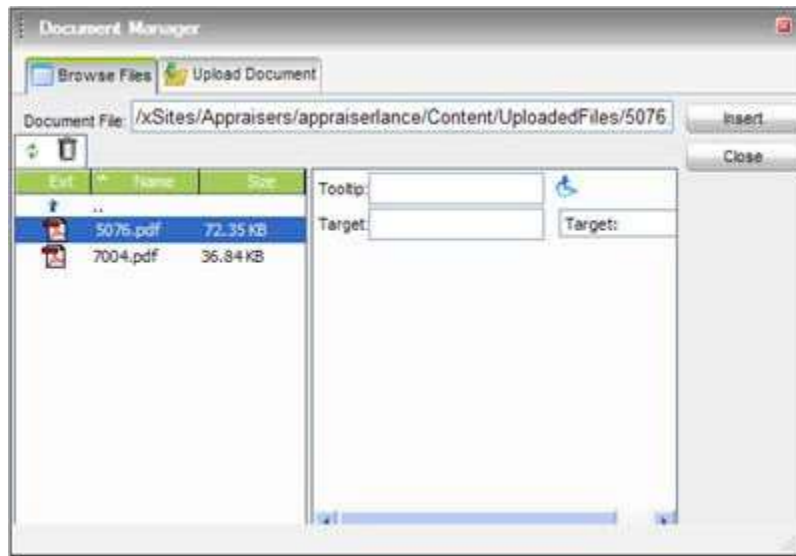
4. Type a brief description of the document into the **Tooltip** field. This description then pops up whenever someone hovers the cursor over the link and provides search engines with one other piece of information they can use to rank your site.

5. Finally, choose a **Target** from the drop-down menu provided. Options are:
   - o **New Window** - Opens the web page in a new window
   - o **Same Window** - Opens the web page in the main window
   - o **Frame -** Opens the web page in a frame - keeping just your site header intact.
   - o **IFrame** - Opens the web page in a frame - keeping just your site header and side navigation intact.

6. When finished, click **Insert** to place the link to your document into your web page.

Adding Links to Page Anchors

Page anchors are electronic bookmarks within a page. If you have a web page divided into sections, you can provide a menu at the top of the page containing links to each section. Now, your site visitors won't have to scroll down the entire page to get to the sections drawing their interest.

Adding links to page anchors in your web page is a two step process:

- First, insert the page anchors or bookmarks on your page.
- Next, create links to these anchors from another location in your page (like the top).

Inserting Page Anchors

1. Place your cursor where you want the page anchor to reside on your page and then click the **Hyperlink Manager** icon (the one that looks like a globe with two enclosed chain links.

2. In the screen that appears, click the **Anchor** tab and type a name for the anchor you're inserting. If, for instance, you placed this anchor at the

The Content Editor

top of the page, you might name it "Top." Just make sure to give it a meaningful name.

3. Finally, click **OK** to insert the anchor into your page.

While nothing may appear to happen in your page, an anchor is created and added to the list of available anchors so that you can link to it.

Linking to Page Anchor

1. In the **Content Editor**, place your cursor where you'd like to insert the link. Alternately, if you want to turn some existing text or an image into a hyperlink, select the text (or image) you want the user to click.

2. Click the **Hyperlink Manager** icon (the one that looks like a globe with two enclosed chain links.

3. Find the anchor you created in the **Existing Anchor** drop-down menu and click to select it.

4. Finally, type some **Link Text** into the available field if it is not already filled out and type a description of this link into the **Tooltip** field to give your viewers a better understanding of what will happen when they click the link

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Note: If you leave the **Link Text** field blank, the anchor name is inserted into the page as the Link Text.

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5. Click **OK** to insert your anchor link.

Adding Links to E-mail Addresses

Inserting a link to an e-mail address makes it quick and easy for your site visitors to communicate with you. When viewers click the link, their default e-mail program appears, opens a new e-mail message and inserts the e-mail address you specify into the To line.

To add a link to an e-mail address into your web page:

1. In the Content Editor, place your cursor where you'd like to insert the link. Alternately, if you want to turn some existing text or an image into a hyperlink, select the text (or image) you want the user to click.

Hint: While rare, it is possible that some people won't have they're system configured properly to take advantage of these links. Therefore, we recommend using your actual e-mail address as the link text. That way, even if viewers don't have their system configured, they can still see your address and e-mail you manually.

---

2. Click the **Hyperlink Manager** icon (the one that looks like a globe with two enclosed chain links.

3. In the screen that appears, click the **E-mail** tab.

4. Type the destination e-mail address in the **Address** field and, if necessary, some **Link Text** (if that field is not already filled out). In the **Subject** field, enter a default subject for the message. Of course, users can change this text when they create the message.

5. Finally, click **OK** to insert your link into your web page.

Using HTML from an Existing Web Page

If you had a site previous to your XSite, you may want to copy over some of your site pages. Here's how:

The Content Editor

1. Go to your existing web page and select the desired elements and copy them to your clipboard.

2. Open any new or existing content page in the **Content Editor**.

3. Place your cursor where you want the content from your old page to start – if the page is blank, that will be the top - and click the paste button in the tool bar, or just press **Ctrl+V**.

💡**Hint**: If you have a monitor large enough to display both web pages at once (the old site with the content you want to use in one window, the **Page Content Editor** window in another) you can simply drag and drop elements from the old page to the new. No cut, copy and paste necessary.

If things don't appear quite right, you may need to edit the content to fit its new environment. Click the **HTML Mode** button if you really need to fine tune the appearance.

Be sure to click **Save** when you are through.

Copying Data from Microsoft Word

Some web page editors, like Microsoft Word, add extraneous codes and tags to your web pages. While these normally don't cause a problem in displaying the pages on their own, they can cause some odd results when they're pasted into an existing XSite web page. To handle this, the editor has a few buttons that can help.

|	
	Paste from Word- This option pastes any content copied from Word into the editor, but first strips out any extraneous codes or tags.
	Paste Plain Text - Often the safest option, this tool pastes in just the text you've copied. Any codes or graphics are left out.
	Paste HTML - This option pastes the actual HTML code into the editor. It is rarely used.

Using Multimedia Content

Multi-media files like videos and music can add a rich dimension to your XSite. Visitor can view or listen to these items while browsing through your site, increasing the chances that they'll spend more time learning about your business.

The Content Editor allows you to upload these types of files, then create links to them within your pages.

1. In the Content Editor, click the **Insert Media** button in the toolbar.

2. In the **Media Manager** screen, select the media file you wish to insert into your page or click on the **Upload Media** tab to upload a new file.
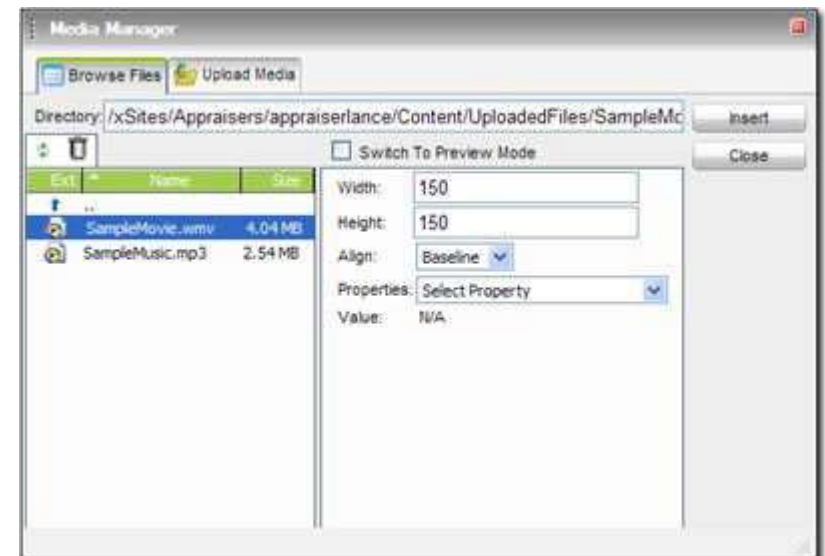
The Content Editor

The remaining options pertain to how the media file is displayed and functions on the page. At any time, click the **Switch to Preview Mode** check box to view or listen to your media file.

- **Width/Height** - Specify how many pixels wide and high the media file should display. If these entries are different from the native size of the media file, then the image will be expanded or compressed when visitors view the page.

  Hint: If you're inserting an audio file into your page, there will be no video area to display, of course. You can have the audio play without showing anything on screen by setting both the Width and Height to zero.

  However, if you want users to have control over starting, stopping and rewinding the audio, you should still display at least the media control panel, but setting the Width to 200 and the Height to 40.

- **Align** - This setting controls where the media file is placed on the page and how text is wrapped around it. For example, choosing Right from the drop down menu places your media image on the far, right side of the page, and wraps any text on the page to its left.

- **Properties** - There are a number of properties that control how your media file is treated when it's loaded on a page. Depending upon the property chosen, additional fields are displayed below the **Properties** drop down menu. In addition, text describing each property and how it's used is displayed. Here are some Properties that might be particularly useful in placing media files on your XSite:

  - **AutoStart** - Set this to Yes and your media file will start playing as soon as the page is loaded.

  - **ClickToPlay** - If you'd prefer to have visitors click on the media file to start playing, set this property to Yes.

  - **ShowControls** - This property lets you specify whether the start, stop, pause, fast forward and rewind tools are displayed for your media file.

  - **Volume** - Use this to adjust the initial volume of media file.

3. When you're satisfied with your options, click **Insert** to embed the media file into your web page.

Using Flash Content

Using your XSite's Content Editor you can insert a Flash (SWF) file into your web page, allowing you to make anything from fancy forms, to videos, to special effects. After all, your XSite itself is designed using Flash technology.

Note: Creating Flash files is beyond the scope of this user's guide and our support staff. If you believe that custom Flash content will add value to your site, consult a web design professional for assistance designing and implementing this content.

1. In the Content Editor, click the **Insert Flash** button in the toolbar.

2. From the **Flash Manager** screen, select the Flash file you wish to insert into your page. If you have not yet uploaded the Flash file, see the Uploading Files section of this user's guide.

3. Using the fields provided specify the **Width** and **Height** of the Flash player in your page. In addition, you can specify alignment, "video" quality, background color, and other behaviors of the Flash file.

The Content Editor

4. To preview your Flash file before inserting it into your site, check the **Switch to Preview Mode** box.

5. When you're satisfied with the placement and characteristics of your Flash file, click **Insert** to place it in your page.

Uploading Files

Your XSite has a built-in **File Manager** that provides access to your files as you edit a page. This tool can be used to upload:

- Images for use in Content Pages

- Images for use in Listings

- Documents which visitors can download

- Multimedia files

Note: While you can access the File Manager tool to upload all types of files, you can only view those files from their respective managers. For instance, if you're uploading image files, you could upload them from the Media Manager, but you would not be able to view them unless you opened the Image Manager.

While you can always upload and manage the files in your XSite's File Library, there are several benefits to using this tool.

- You can upload files on-the-fly, so that you don't have to remember to upload them before you use them in your web page.

- You can upload multiple files at once.

The File Manager is available from two places:

- From the Content Editor

    1. Log into your XSite and click **XSite** in the main toolbar.

    2. When the **XSite Wizard** loads, click the **My Content** button in the Content pane on the left.

    3. In the list of pages that appears, find the page you wish to edit. Remember that there are several tabs that list different types of pages.

4. Click the name of the page you'd like to edit.

5. Click the file management button that corresponds to the type of file(s) you wish to upload.

- From a Listings page

    5. Log into your XSite and click **Listings** in the main toolbar.

    6. When the **My Listings** page appears, locate the desired listing and click the **Edit Details** link. (Or, click **Create a New Listing**.)

    7. Click the **Photo Manager** button from the **Manage Your Listing** screen.

    8. **Click Add** to bring up the **File Manager**.

When the File Manger appears, follow these steps to upload files:

3. Click the **Upload** tab. The exact tab name varies depending on the type of file manager you selected. For instance, in the Image Manager, the tab name is "Upload Image."

4. In the screen that appears, use the available fields and buttons to select the file or files you wish to upload. Options are:

    o To select a file to upload, click the **Select** button and browse to the file you wish to upload.

    o To upload an additional file, click **Add**. Then, click **Select** and browse out to that next file. Repeat this process until you've selected all of the files you wish to upload.

    o If you need to remove one of the slots for a file to upload, click **Remove** beside the slot you wish to remove.

    o To delete a file from the upload process, check the box beside it and click **Delete**.

Listings

4. When you've selected all the files you wish to upload, click **Upload**.

Your files are immediately uploaded to your site and a progress bar appears to show you the progress of the upload.

Note: Depending on the limitations of your Internet Service Provider (ISP), it is possible that this process may time out. Generally, this occurs whenever you choose to upload too much information at one time. To address this problem you need to adjust the total file size of your upload. If you attempted to upload multiple files, try uploading again with fewer files. If you attempted to upload one file and its size caused a timeout, try reducing the file's size. Otherwise, you may need to try uploading the file from a computer with a faster connection or with an alternate ISP.

Listings

Face it, the primary reason most people are going to visit – and stay – on your XSite is to view your property listings. In addition to those visitors looking for a new home, your home sellers will want to view their property. Luckily, the listings features of XSites are designed to present your listed properties in the most professional and dazzling style.

To access the Listings Management features of your XSite, log into your XSite admin, then click the **Listings** button located at the top of the screen.

Working with Listings

From the main toolbar, click the **Listings** icon, then click **View My Listings** under the **My Listings** menu to view all of the listings in your XSite. The grid displays your listed properties on several pages, depending upon how many you have loaded. If more listings are in your database than can be shown on one screen, you can browse page by page by clicking the arrows at the bottom of the page.

- A pair of drop down lists at the top of the page allow you to sort your listings. For example, to have listings sorted by the city they are in, select City from the first menu, then select whether you'd like your listings sorted in Ascending (1-9, a-z) or Descending (z-a, 9-1) order.

- To the right of the Sorting menus are three buttons that allow you to change how your listings are displayed. Click the corresponding button to view the listings in a grid, as thumbnails or in a text list.

- To edit any existing listing, simply click the **Edit Details** link displayed with that listing.

- To add a new listing, click the **Create a New Listing** button at the top of the page.

Note: If you use Top Producer 7i and you want to save time by importing/exporting your listings directly into your Agent XSite you can do so referring to the Importing listings from Top Producer 7i® section of this manual.

Creating Listings

If you're not going to import your listings from another source, you'll just have to do it the old fashioned way. Of course, if you've already entered the information into any other source, such as the MLS, you can always open both windows and use Copy & Paste to eliminate retyping the data.

Note: If you're using Top Producer 7i and you want to save time by importing/exporting your listings directly into your Agent XSite you can do so referring to the Importing listings from Top Producer 7i® section of this manual.

Listings

To create a new listing:

1. Click the **Listings** icon in the toolbar, then click **View My Listings** in the **My Listings** menu.

2. Click the **Create a New Listing** button.

3. Decide if this listing should be a "Featured Listing" by clicking that check box.

4. When you're ready to upload photos of your listing, click the **Photo Manager** button. (Refer to the Photo Manager section of this manual for more info.)

5. Now, go through each tab and type the information requested. You can enter as much or as little information as you desire. At a minimum, you must enter the Address, City, State and Zip in the **Property Info** tab.

There are a few fields with special functions.

- On the **MLS Info** tab, the **List Status** item allows you to set the status of the property. When you create your listings pages, you can use this field to filter the properties to be shown. If a particular status you wish to use is not listed, select **Add New Status** from the menu. Type the new status type – "Under Contract," for instance – and click **OK**.

- In the **Property Info** tab, you can select the **Property Type** from the drop-down menu. If a property type you specialize in is not listed, select **Add New Property** from the menu, then type the name of your specialty – "Waterfront," for instance – and click **OK**.

- The Listing Agent drop down menu allows you to assign this listing to a specific agent in your office. Once assigned, their specific contact information is displayed along with the listing, rather than the general company information. To add an Agent account to your system, or edit their information, click the **add** link to open the User Management tool.

- Also on the Property Info tab is the section that let's you publish an arial map of the property using the Google Earth tool. You also have the option of publishing a map, but hiding the address, or entering the URL of your own map page.

- If you have a 3D Tour service, you can specify a web URL to associate with this listing to show the tour or upload an .EGG file (if you have one) and have the tour hosted right on your XSite.

Listing URL

At the bottom of the screen, enter a **Listing URL** name in the field provided. This allows you to use a simple URL on all marketing materials for that property. For example, you might enter their address (without spaces) in this field.

Now, to direct visitors to this specific listing, give them the URL:

http://www.baytownproperties.biz/1564Elm

Publish this Listing

In addition to posting your listing on your XSite, you can share it with several services. Click the check box for each of the following services with which you'd like to share this listing.

- XSites Network

- Listings XChange

Listings

- Listings Publisher partners

Note: If you're using the XSellerate marketing tool, an additional feature is displayed, allowing you to market your listing directly. See the Marketing your Listings section of this manual for more details.

Importing Listings from Top Producer 7i®

To import your listings from your Top Producer 7i database into your Agent XSite:

1. Open your web browser and point it to https://www.topproduceronline.com/default.htm

2. Enter your Top Producer **Username** and **Password** into the appropriate fields and click **Login**.

3. Click **Setup** on the menu bar and select **Listing upload setup**.

4. On the **Setup websites for listing** screen, click **Add a Website**.

5. On the **Add website** screen enter your website name into the **Website name** field.

6. In the **HTTP-POST URL** field, enter the web address to which your data should be posted.

   o For example, if you have a domain the entry would be appear like this (substituting your domain name for mydomain.com, of course.):

http://www.mydomain.com/listings/tppost.aspx

   o If you do not have a domain name, your entry should appear like this (again, substituting the appropriate site name):

http://sitename.admin.agentxistes.com/listings/tppost.aspx

7. In the **Username** field, enter the username you setup for your Agent XSite.

8. In the **Password** field, enter the password you created for your Agent XSite.

9. Under the **Upload method** heading, select **Upload listing using HTTP-POST**.

10. Click **OK** to save your settings.

11. Once you have completed the setup, you can upload your listings to your XSite directly from Top Producer by clicking **Listings** on the menu bar and choosing **Current Listings** out of the drop-down menu that appears.
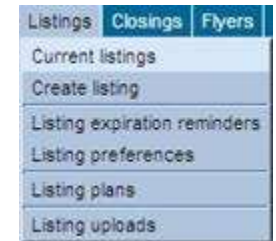
12. Click an individual listing that you would like to upload to your XSite and then click the **View or edit listing** link in the menu pane on the left.

13. When the listing information appears, click the **Upload listing to web sites** link in the menu pane on the left to upload the listing to your XSite.

14. Finally, when the warning appears indicating that this process will upload the listing data to all websites you've configured in Top Producer, click **OK** to proceed with the upload to your XSite.

After a few moments, the listing information is loaded into your XSite. To further manage the listing's data from within your XSite see the Working with Listings section of this manual.

Note: As this process is performed entirely through Top Producer, should you experience any difficulties uploading listings to your XSite with this method, please contact Top Producer.

Photo Manager & Virtual Tours

Visual images are often the most powerful feature of your listing. Since XSites don't limit the number of photos you can use on each listing, make sure you use as many as needed to convey the strengths of the property.

Note: The photo manager assumes that photos, usually in JPEG format, are already stored on your system or on some other device you can access through Windows Explorer. Some cameras attach to your system using a docking station or USB cable and then appear as another storage device -

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like a hard drive or CD-ROM. Others have removable memory cards which you can insert into a reader attached to your computer. These, too, appear as a storage device in Windows.

To get started:

1. Open any existing listing for editing - or create a new one - then click the **Photo Manager** button from the **Manage Your Listing** screen.

2. At the bottom of the window, click **Add** to begin uploading the photos you wish to assign to this listing.

3. In the screen that appears, use the available fields and buttons to select the file or files you wish to upload. Options are:

   o To select a file to upload, click the **Select** button and browse to the file you wish to upload.

   o To upload an additional file, click **Add**. Then, click **Select** and browse out to that next file. Repeat this process until you've selected all of the files you wish to upload.

   o If you need to remove one of the slots for a file to upload, click **Remove** beside the slot you wish to remove.

   o To delete a file from the upload process, check the box beside it and click **Delete**.

4. When you've selected all the files you wish to upload, click **Upload**.

Your files begin uploading to your site and a progress bar appears to show you the progress of the upload. When complete, all of your photos appear in the Photo Manager.

Once you have several photos inserted for this listing:

- Select one to be the showcase photo to be displayed with the listing on your listings pages.

- Use the **Move Up** and **Move Down** buttons to determine the order in which the photos appear in the slide show.

- Use **Preview Slideshow** to see what the slideshow will look like.

- Click **Delete** to remove a photo.

Note: If you experience difficulty uploading your pictures, you may want to ensure that your images aren't too large. In addition to causing you frustration while you're trying to update your listings, an overly large file size will likely slow the speed of your website for your site visitors. Generally, file sizes of 300 KB or more can negatively affect your site's performance.

Once you are through creating your visual masterpiece, click **Close** to return to the listing details.

Audio Tours & Podcasting

Your XSite's Listings pages are designed to entice your site visitors to spend more time browsing through your properties. But today's home buyer doesn't always have the time to spend in front of the computer. Now, with the advent of Podcasting, your clients can take audio - and even video - descriptions of your listings with them on their Apple iPod or other compatible MP3 player.

What is Podcasting?

Podcasting technology is rapidly taking the Internet by storm. Put simply, Podcasting allows web site owners to package and publish audio (and video) content. Site visitors can then either download the content to their portable device, or even subscribe to the feed, getting updates on a regular basis. (Click here for a more complete history of Podcasting.)

For XSite owners, this means that you can create audio and video files describing in glowing detail the features of your listings. Instead of flat text, the listings come alive with your enthusiasm and energy. You can create a Podcast entry for any, or all, of your listings. Site visitors can use the free iTunes tool from Apple to subscribe to your Podcasts. Now, whenever you add a Podcast-enriched listing, they'll receive new audio files automatically.

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Creating Media Files

To create a Podcast listing, you must first create an audio or video file which can be attached. At this point, the audio must be in the MP3 format created by most audio tools. Video files can be in either MP4 or M4V format. Click here for a list of some tools that will help you create your own files. In addition, you'll need a simple microphone attached to your PC. Once you have these items, just follow these simple steps:

1. Write a script. Don't try to "wing it" while you're recording. Spend a few minutes and build a story that truly describes your listing in the terms you'd like home buyers to hear. Now, read through your script several times to get familiar with it. You don't want to sound like you're reading when you create the file.

   Also, remember to keep it short. Your customers are looking at a large number of properties and their time is valuable. As a rule of thumb, let the price of the home be your guide. On a mid-range or starter home, a 30 second piece is probably ideal. If your listing is a luxury property, you can be a bit more verbose. In any case, try to keep the length under 2 minutes.

2. Now, launch your audio or video creation software and open a new file. If you don't have a software application that can create the appropriate file, you can use a combination of tools - such as the Microsoft Windows Sound Recorder and Apple's iTunes - to create one. Whatever you use, make sure you have a nice quiet place to work and keep a glass of water handy.

3. When you're all ready, launch into the description of the property. Remember to infuse your voice with the same enthusiasm, energy and charm you would if you were talking to a person face-to-face.

4. Finally, save your media file on your computer.

Using Sound Recorder & iTunes

While Microsoft Windows does ship with a Sound Recorder utility, it will not save files in the MP3 format. You can use this tool to record your audio, but you'll have to then convert the file into an MP3. Apple's iTunes program can help you do this.

Here are the steps for using this combination to create your MP3 files.

1. The first step is to record your audio using Sound Recorder. Click the **Start** menu and run the Sound Recorder applet. It's normally found in the Entertainment program group.

2. Record your audio tour using some of the hints given above. When you're done, click **File**, **Properties**, then click **Convert Now**. From the **Name** drop-down menu, choose CD Quality and click **OK** twice.

3. Now, click **File,** then **Save.** Give you audio file a name and store it on your hard drive.

Next, you need to import your audio clip into Apple's iTunes application, and then convert it to MP3 format.

1. Launch your iTunes application, then choose **Edit, Preferences** from the menus. Click the **Advanced** tab and, from the **Import Using** drop-down menu, choose. **MP3 Encoder**. Click **OK**.

2. Now, import your audio file by either dragging and dropping it into your iTunes library, or clicking **File, Add file to library** and then selecting the file from your hard drive.

3. Right-click the audio file in the iTunes Library list and choose **Convert Selection to MP3**. Right-click it again and choose **Copy**.

4. Finally, paste the file in an easy to find directory on your hard drive.

Advanced Audio Editing

While the combination of the Windows Sound Recorder and iTunes will allow you to create the MP3 files necessary for Podcasting on your XSite, you can create higher-quality, professional sounding audio using a number of dedicated audio editing tools. These applications allow you to clean your audio files up a bit before you publish them. For example, you can clip out any bad pauses. Or, if you like, you can even add a musical back-track. (Just make sure you have publishing rights to the music.)

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Audio tools

Here are some tools you might consider if you don't already have an software to create audio files.

Tool	Website
Audacity	http://audacity.sourceforge.net/
Audio Edit Magic	http://www.mp3editmagic.com/
AVS Audio Editor	http://www.avsmedia.com/AudioEditor
Any Sound Recorder	http://www.any-sound-recorder.com/
WavePad	http://www.nch.com.au/wavepad/

Recommended audio settings

When creating your audio files, you'll have the choice of setting your recording options to various quality settings. Of course, as with most things, the more quality you put into the audio file, the larger the download file will be. While it is true that virtually every individual using Podcasting has a high-speed connection to the Internet, it's also polite to minimize file sizes whenever possible to minimize download times. The following recommendations should provide CD-quality audio files.

Setting	Recommendation
Channels	Stereo
Sample Rate	44,100 Hz
Resolution	16-bit
Bit Rate	128 kbps

Add Podcasting to a Listing

To add Podcasting audio to any of your listings:

1. From the XSite's **My Office** screen, click the **Listings** icon.

2. Click the **Edit Details** link for the listing you'd like to modify. Or, click **New** to add a new listing.

3. When your listing detail screen appears, click the **Podcast this listing** link.

4. Now complete the Podcast listing items. The Title and Description fields are displayed whenever a client receives this Podcast through iTunes. Make sure you include keywords that users might search for when looking for real estate Podcasts, such as "Property" "Real Estate" and your local area. Some of these are included automatically.

5. Now, click the **Browse** button for either the Audio or Video option. Navigate to the MP3, MP4 or M4V media file you created and saved on your computer. Select it and click **Open**.

6. Click **Save** to add the Podcast audio to your listing.

Listening to a Podcast

Once you've added an audio file to your listings, visitors to your sites will have two options to listen to the content.

1. They can simply listen to the audio tour online, or

2. They can subscribe to your Podcasts and receive any new audio property descriptions you add to your site automatically.

Both of these options are available when a customer opens any listing to which you've added an audio feature.

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Listening to the Audio

If your customer would like to listen to your audio tour directly from your XSite, they simply click the **Audio Tour** link in the Property Tools menu. A simple menu appears and your audio plays automatically.

Subscribing to a Podcast

If your customer clicks on the **Subscribe to Podcast** link, they're presented with a simple contact form, asking for their name, phone and email address. Naturally, these items are automatically inserted in your Contacts   database.

After completing this form, the customer is presented with a dialog box explaining the steps they need to take to subscribe to your Podcasts

through Apple's iTunes application. They're also given the option of downloading the audio file directly to any media device they may have attached to their system.

Listings Publisher

Exposure is the name of the game. The more places your listings are seen, the higher the probability that you'll be able to sell that property for the best price. Of course you list your properties on the MLS. And by entering them on your XSite, you can make them part of the XSites Network properties database, and share them with your Listings XChange Partners.

But your XSite offers another option as well. For each property on your site, you can specify whether you'd like to have the listings published on third-party real estate listing services, such as Oodle.com or Trulia.com. Others outlets will be added on a regular basis.

To publish your listings:

1. From the XSite menu, click the **Listings** icon.

2. Scroll through your listings to display one you'd like to publish, and click the **Edit Details** button.

3. Scroll down to the **Publish this Listing** section and click the check box for each of the services you wish to use.

 Note: There are new publishing partners being added to the Listings Publisher toolset all the time. However, not all partners have coverage in every part of the nation. Make sure you check with the publisher (Oodle.com for example) to ensure they cover your area before you publish your listings.

Creating Listing Pages

You can create pages to display your listings from one of two places:

- Use the **XSites Wizard** and open the My Content page. Then click the **Listing Pages** tab.

- OR -

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- Click the **My Listing Pages** option on the **My Listings** page.

From either place the process for creating listings pages is the same. To create a new listing page, click the **Add Listings Page** button.

1. First, give your listings page a name by entering it in the **Button Name** text box. Remember, this is the text that shows up in your site's menus. Make sure you enter a similar name in the **Web Page Address**, so you can give people a simple URL to view this page directly.

2. Next, complete the selection options to indicate which listings should appear on this page, and how they're displayed:

Filters include:

- **Featured Listings** - These options are used for advance table editing and are not supported on XSites.

- **By Price** – Select any price range.

- **By List Date** – enter a beginning and ending date.

- **By City** – select from the drop-down list, which shows all of the cities represented in your listings database.

- **By Status** – For Sale, Sale Pending, Sold, or For Rent.

- **By Property Type** – Select from the list of several property types, including those you may have created yourself.

- **By My Agents** – Select any of the agents in your office. The specific agent is assigned to the listing when you enter that listing in the database.

- **Include listings shared through Listings XChange** – Select this option to display any properties supplied by your Listings XChange partners that might meet your criteria.

- **Listing Sort Options** - Select a option from the drop down menus to indicate how you'd like the listings on this page sorted by default. Of course, site visitors can always re-sort them as they see fit.

- **Display Preferences** - Use the Listing Preferences options to control how the listings should appear on this page.

3. Complete the Search Engine Tools section of the page options, if desired.

4. When you're done, click **Save Changes** to complete your page creation. Repeat these steps for as many different listings pages as you desire.

Note: To add your new listing page to your site, make sure you click the check box for that page in the Listings Pages panel, then click Save Pages.

Listing Preferences

The listings preferences control how your pages display properties. Some settings are global, while others can be set on a page-by-page basis.

- On the **My Listings** page, click on the **Preferences** link.

Global Settings

- Click the **Show Estimated Monthly Payment** check box to have your XSite automatically calculate and display an estimated payment for all of your listed properties. This figure is based on the asking price you enter for each listing, as well as an assumed down payment percentage.

- In the **Assumed down payment amount** text box, enter the desired amount from 0 to 99%.

- The **Enable "My Notes"** option allows site visitors to create an account on your system, and then enter notes for any of the properties you have listed.

- If you would like your **Featured** properties to be shown with a special icon in any of the graphic lists in which it appears, then click the check box for **Highlight Featured Listings**. With this selected, whenever

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visitors view one of your listings pages in either the **Grid** or **Image** formats, each of the properties you've marked as "featured" will have an additional graphic highlighting it.

- Like the My Notes tool, **Enable Favorites** allows site visitors to create an account, and then create lists of their favorite properties.

- The final global option allows you to enable or disable the property search feature. If you would prefer to not allow visitors to search your online listings, turn this option off.

Page Settings

Next, you can modify how the properties are shown on each of your listings pages.

1. From the drop-down menu, select the page for which you'd like to change the settings. All of the pages on your XSite which contain listings - either as a stand along page, or as an option on another page, such as your home page - appear in this list.

2. If you'd like to change the settings of all of your listings pages at once, first make the changes using the options below, then scroll down and click the **Apply these settings to all my listings pages** link.

3. Visitors to your site have the option of viewing your listings pages in one of three formats: **Grid, Image** or **List**. Click the tab for the View type you'd like to modify.

3. From the drop-down menu, select the **Default view for this page**. The user will still have the option to change views.

4. Select the number of listings you'd like displayed on each page. Remember that the more listings you have displayed, the slower the page will come up when a user clicks on it.

5. Next, chose a listings template from the drop-down menu. This controls how the listings are laid out on the screen.

6. Finally, choose an animation setting. This controls how the listings pages are "built" when a user clicks on them. Animation settings add a lot of pizzazz to your listings!

7. Click **Save Settings** to save your work.

Including Listings

Any of your XSite pages can have a listings grid displayed on it with just a few clicks. To add listings to a page f**rom the My Content page in the XSite Wizard:**

2. Select the tab containing the page you want to modify (**Provided Pages**, or **Custom Pages**), then click the name of the page to which you want to add a listing grid.

5. When the **Page Content Editor** window opens, scroll down to the **Other Page Options** section. Click **Listings**, then click **Customize**.

6. Select from the options presented to filter out just those properties you want displayed on this page.

7. Click the **Save** button to lock in your options.

Repeat these steps for any other pages on which you'd like property listings to appear.

Adding IDX to Your Site

IDX (Internet Data Exchange) or Broker Reciprocity is an agreement between brokers that allows agents to display listings that are not their own on a website. It's not the whole MLS – just listings from those brokers that opt in to participate. Even though these are other people's listings for which your commission is smaller, having IDX on your site means you're a one stop shop. Plus, unlike other online real estate listings, like Realtor.com or Yahoo Real Estate, IDX listings do not have contact information for the listing agents – they contact you for details.

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The IDX protocol defines a means by which a software provider can tie into an IDX solution using a web URL. These tools are often provided by your local MLS, but there could also be other IDX providers in your area with whom you can subscribe. Signing up for IDX is something you must do through your MLS or IDX Provider, outside of XSites.

Before enabling this feature, you need to check with your IDX provider for the URL to use as well as other requirements

To add IDX to your site:

1. From the XSite Admin tools, click the **IDX** option in the **Listings** drop down menu.

2. If you've already created an IDX link and wish to add another, click the **Add an IDX Page** button.

> 🌐 **Note:** You can include more than one IDX link on your XSite. This is particularly helpful for those agents who operate in an area that is served by more than one MLS.

3. From the first drop-down menu, select your state, or the state in which your MLS board is based.

4. Once you've selected a state in the first box, the second drop-down menu is populated with the names of the real estate boards and MLS providers in that state, scroll through the list to select the board that is providing you with IDX data.

5. Once a board or MLS is selected, a third drop-down menu displays the specific IDX tools you may wish to use. Select a vendor from this list, and follow the instructions presented by that tool vendor.

6. If you're provider is not listed, simply enter your IDX URL (provided by your IDX vendor) and other information in the appropriate fields.

7. Next, scroll down and enter a **Button Name,** such as "All area listings" or something that indicates to a consumer these are not all yours, but is a bigger list.

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8. Enter a **Page Title** that matches your button name.

9. Now, select a frame type from the **Window Options** drop down menu:

   o **Open a new window** – opens a new browser window to display your IDX information. Your XSite remains open, but is pushed to the background.

   o **Open in current window** – this option replaces your XSite with the IDX information. Since there's no way for the site visitor to return to your XSite without using the **Back** button, this link is not recommended.

   o **Open in an iFrame** – this is the recommended format for an IDX link. It retains the site navigation panels from your XSite, but places the IDX information in a scrollable window within that frame. This gives site visitors the feeling that they're still doing business with you.

   o **Open in a frame** – similar to an iFrame, the simple frame retains the top navigation bar, but eliminates your secondary navigation tools. Use this option if your IDX information doesn't fit well in an iFrame screen.

10. When everything works properly, click the **Save** button to activate the IDX tool on your XSite.

Listings XChange

One of the most powerful features in your XSite is the ability to share listings with other agents. Whether you're building a network with other agents in your own office, or a group of colleagues around your area, you can instantly have access to each other's listings by setting up a sharing relationship.

This feature is particularly useful to brokers or agent teams that want to aggregate their listings on each site yet maintain control over their individual listings and leads.

 Note: At this time, in order to share listings, all agents must have an Agent XSite.

To create your own listings network, from the **My Office** toolbar, click the **Listings XChange option in the Listings drop down menu.** This opens the tool that helps you identify and sign up other agents to be part of your group.

The process involves three simple steps:

Step 1: Locate and invite another agent to share their listings with you.

Step 2: The other agent is notified via e-mail of your request and can then enter their XSite to either accept or decline your invitation.

Step 3: Once they've accepted, their listings are automatically included along with yours for use on any of your XSite's listings pages. For help with setting up custom listings pages, see the Creating New Listings Pages section of this manual.

Inviting Other Agents to Share

To begin the process, from the **Listings XChange** screen,

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1. Click the **Create a Partnership** button to open the **Search XSites Network** window.

2. To find a specific agent in your area, enter any data you know about them in the Name, Domain, E-mail, City or State field, then click **Search**. You can be as specific or general as you wish.

3. Your XSite looks for any other Agent XSite users that match your criteria and displays them in a list. Scroll through this list to find the agent you wish to invite and click the check box next to their name. You can click on their web site address to view their current site, if needed. Also, the right-most columns display the number of listings this agent has on their site, and the number that they're willing to share via Listings XChange.

4. Continue through the list to identify as many agents as desired, then click the **Next** button.

5. A dialog box appears warning you that you're about to send an e-mail notification to each of the agents you selected. To edit the specific message that is going to be sent, click the link in this dialog box.

6. Our familiar Page Content Editor opens with a default message inserted. You can edit this message using any of the rich HTML-based commands found in the menu bar. Make sure you put your best foot forward, as you may need to "sell" the benefit of sharing leads with another agent.

7. Click **Save** to keep your changes, then click **Send** in the **Invitation E-mail** dialog box.

You can repeat the above steps to invite as many agents as you like to join your group.

If you're not sure which agents in your area are using XSites, you can also scan through a complete list by clicking the **Browse** button. A new window opens and displays a map of the United States and Canada. Click on your country, then the state or province in which you wish to look. When your county is displayed, click it to display the list of all XSite owners in that county. Now, follow steps 3-7 above to invite the desired agents to join your group.

Pending Partnerships

Once you've sent your invitations, the request is listed on the **Listings XChange** window under **Pending Partnerships**. If you have received any invitations from other agents, those appear in this area as well.

Accepting and Declining Invitations – To accept an invitation from another agent, simply click the **Accept** link next to their name. Or, click **Decline** to refuse the invitation. As with the search pages, you can see how many listings this agent has and is willing to share in the right-most columns. Or, click on their domain name to browse their site and see for yourself.

Resending Invitations – If you've not gotten a response from an invitation you've sent before (either positive or negative), you can resend that invitation by clicking the **Resend Invitation** link next to the desired name.

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Deleting Invitations – If an agent you've invited has not responded to your request, you can delete them from your list at any time. Just click the check box next to their name in the **Pending Partnerships** list, then click the **Delete Invitation** button.

Current Partnerships

At the bottom of the **Listings XChange** window, under **Your Partnerships** is the list of all the agents with whom you have a relationship. You can quickly enable or disable the listings from another agent's site by clicking the check box next to their name.

If you wish to end your partnership with a particular agent, click the **Stop Sharing** link for that agent. This deletes your partnership and notifies the other agent via e-mail.

XChange Preferences

Of course not everybody will wish to participate in the Listings XChange system. Using the **Preferences** screen, you can control how you appear in the network. To do so, from the **Listings** screen, choose **Preferences** from the **XChange** menu.

Hide From Searches – If you would like to participate in a Listings XChange partnership with only a specific group of people, you can remove your site from any partnership search. Now, if someone searches for your name, domain name, city or state, or browses the directory of your area, your XSite will not be displayed in the results. People can, however, invite you to establish a partnership by searching for your specific e-mail address.

Click the check box next to the first option to enable this setting.

Disable Listings XChange Invitations – If you would prefer to not accept any invitations at all, click the check box for this option.

Note: Even though you will not get any invitations, you can still invite other agents to share with you.

Block specific sites – It may be that you're happy to entertain invitations from most agents, but there are some that you would prefer not to interact with. In that case, you can add them to your list of blocked sites. Once added, nobody from that domain can invite you to partner with them. Click the **Add a site** button to create your list of blocked domains. Use the **Search** or **Browse** functions to find the appropriate agents, and click the check box next to their name. Click **Next** to add the names to your list.

Lead Capture Tools

Lead Capture Tools

For most agents, one of the primary reasons for maintaining a web site is to generate leads from prospective home buyers and sellers. Done right, your XSite can play a major role in your business development strategies. **Lead Capture Tools** are a valuable asset in helping you execute that strategy.

For every page on your XSite, you can add a customized lead generation form that allows you to request whatever information you like. When site visitors complete these forms, the information goes straight to you, and the sender also gets an instantaneous response sent to their e-mail letting them know their message was sent – no guesswork. As an added bonus, if you're using the XSellerate automated marketing tool, you can link your lead generation form to a marketing campaign.

To use your XSite's **Lead Capture Tools**, simply click the **Lead Capture** option from the **XSite** drop-down menu.

Lead Capture Powerview

From this section in your XSite's **Lead Capture Tools** you can quickly see which pages on your site have lead generation forms included on them.

Page Filter – At the top of the screen, you can specify which pages from your site you'd like to look at.

- Click **Show active pages** if you only want to see the pages that are currently enabled on your site. Or, click **Show all pages** to see every report included with your XSite.

- From the drop-down menus on the right, you can further limit the display to only those pages of a particular type (Provided pages, Listings pages, Custom pages, etc.), or pages that only include a particular form (based on a list of all the custom forms you've created) or forms that are linked to particular groups (defined in your Contacts database).

- To provide additional data, click the check box to **Show lead capture stats**. With this option enabled, the number of leads generated by each page is displayed.

Results – Once you've set the filters, the pages that match your criteria is displayed below. Scroll down through the list to see how each page is configured.

- Each page shows which, if any, embedded form or doorway form is associated with it. In addition, the group with which the form is associated is displayed.

- Click the **Edit Settings** link for any page to select a new **Embedded form** or **Doorway form** for that page.

- Click the **Password Protection** link to lock or unlock any page.

- If you have the **Show lead capture stats** option turned on, the number of responses from the form is listed for the last 30, 60 and 90 days is displayed as well.

- When you're done modifying the forms on any given page in your XSite, be sure to click the **Save** link to update the page with your changes.

Form Manager

In addition to forms pre-provided with your XSite, you get to setup your own library of lead generation forms to help you get the information you need. After all, you may want to ask different questions, depending on what page a visitor is looking at when they decide they need to contact you.

Lead Capture Tools

The **Lead Capture Form Manager** shows all the forms that are included with your XSite, and those that you've created. From here, you are able to see at a glance:

- Which forms you have available,
- On how many pages you've included a particular form,
- What kind of results you've gotten from your forms over the past 30, 60, or 90 days.

From here, you can click the **Edit** link for any existing form, or create a new form by clicking the **Create a form** button.

Note: Even if a form does not appear on any page of your XSite, you can still use it as a doorway form by using the global settings feature in **Lead Capture Tools**. See the Doorway Forms section of this manual for more information.

Creating Lead Capture Forms

To create a new lead generation form:

1. Open the **Form Manager** in your XSite's **Lead Capture Tools** and click the **Create a Form** button.

2. Enter a name for the form - something like "Request a CMA"

3. Below that, you can give instructions or a welcome or something to that effect. You can leave this blank if you wish.

4. Next, you decide which things you want to ask them. Our default "group" information asks them for their name, e-mail and phone number. To add another field, click **Add a field**, and then give it a label so they'll know what to put in it.

5. Next to the label is a gray box that shows where their answer will go, and next to that is a paragraph button that will toggle the field between a single line ⬜ and multi-line ☰.

You also have "groups" of information. Basically, you can break up what you'll be asking your prospects into sections. You might want to name the default group "Basic Contact Information," for example. But, say, for example, you're asking someone about their family - maybe you could click **Add a group** to first make a new category, then add fields under that group pertaining to their family.

- After you've added fields and groups, you can rearrange them.
- The up ⬆ and down ⬇ arrow next to the fields and groups help you arrange them on the form from top to bottom.
- The rightmost icon 🗙 is used to delete a group or field.

Lead Capture Tools

Lastly, you can enable an automatic response for your lead generation forms. This essentially lets the sender know that their message went through. Just click the box for **Enable Auto Responder** to enable it. You'll also want to personalize the automatic response your prospect gets, so be sure to click **Edit your automated response** and make changes to the standard response form.

6. When you're through creating your custom form, click **Save**.

💡 **Hint**: You can also create new lead generation forms while you're editing a page in your XSite. To create a new form while you're editing a page just check the **Include Lead Generation Form** check box and then click the **Customize** button to bring up the Lead Generation Form tools.

To add a lead generation form to a page in your XSite, see the Lead Capture Tools section of the manual.

💧 **Note**: You can also learn how to create lead generation forms by watching a short video. To view the video, simply go to http://www.alamode.com/TECH/Manuals/Video/CreatingForms/ and click the link to begin viewing it.

Doorway Forms

Doorway forms are simply lead capture forms that your visitors see before they can get to their requested page. These are different from embedded forms that just appear ON a particular page. With a doorway form, your visitors can either fill out the form to continue, or can simply click **Cancel** to continue (unless you've specified that form is required).

💧 **Note**: This can be a powerful way to capture leads, but it can also be frustrating to a visitor if used excessively. For best results, use doorway forms sparingly, and only in places where the destination content is of particular interest and value to your visitors.

💡 **Hint**: Referring often to the XSites Statistics tools in **My Office** can help you know how to customize the way you create and place your lead capture forms on your website.

The following are two categories of doorway form settings that are available to you:

- **Global doorway settings** - These allow you to establish "triggers", which automatically activate the doorway form of your choice through the natural course of a visitor browsing your site. For example, if you changed your settings to permit 3 page views before a doorway form appears, then a site visitor can only view 3 pages in your site before a doorway form will prompt them for information. This would then continue to prompt them to fill out the form every 3 pages they view until they either fill out the form or exceed the maximum number of times you specified the form should appear

- **Page specific settings** - These allow you to specify individual pages that should be preceded by a doorway form.

Global Settings

Global settings allow you to establish "triggers", which automatically activate doorway forms you choose through the natural course of a visitor browsing your site.

💡 **Hint**: You can track the effectiveness or your doorway forms by using the **Leads from this form** drop-down menu to indicate the number of leads you've acquired using your doorway forms over the past 30, 60, or 90 days.

There are two types of triggers that you can enable:

Page View

Page View triggers automatically prompts a prospect to fill out a lead capture form after viewing a specified number of pages in your XSite. Using the **Page View Settings** section, you can determine how many pages you want to permit a prospect to browse before the lead generation form

Lead Capture Tools

appears, whether you want to require them to fill out the form before browsing the rest of your site, and what types of pages in your XSite you want to include in the page view count. You can even determine how many times the form will reappear before allowing the visitor to continue browsing your site without occasional prompts to fill out a form.

To enable the **Page View triggers**:

1. Check the **Activate the page counter trigger** check box.

2. Determine how many pages you want to allow prospects to visit before prompting them to fill out a lead generation form and type the desired number in the available text box.

3. Choose a lead generation form to display after visitors trip the lead trigger from the drop-down menu on the right.

4. Next, choose a contact group that you would like their contact information to insert their contact information into from the drop-down menu on the right.

5. Determine if you want to require your visitors to fill out the form before allowing them to continue browsing through your site or choose the number of times the form will reappear before allowing your visitors to continue browsing the site uninterrupted and check the corresponding boxes to activate your desire setup.

6. Finally, in the **Pages to count** section, choose whether you want to include content pages, listings pages, or both in the page count that will trip the **Page View trigger** and indicate you choice by checking the corresponding boxes.

7. Be sure to click **Save** to apply your changes.

Listing Detail

Listing Detail triggers automatically prompt a visitor to fill out a lead capture form after requesting to view additional details on any listing within your site. As with **Page View triggers**, using the **Listings Detail Trigger** section you can determine whether you want to require the visitor to fill out

the form before continuing to the listing detail page and how many listings detail requests cause the form to appear before your visitors are free to continue browsing the site without occasional appearances by lead capture forms.

To enable **Listing Detail triggers**:

1. Check the **Activate the listing detail trigger** check box.

2. Choose a lead generation form to display after visitors trip the lead trigger from the drop-down menu on the right.

3. Next, choose a contact group that you would like their contact information to insert their contact information into from the drop-down menu on the right.

4. Finally, determine if you want to require your visitors to fill out the form before allowing them to continue browsing through your site or choose the number of times the form will reappear before allowing your visitors to continue browsing the site uninterrupted and check the corresponding boxes to activate your desire setup.

5. Be sure to click **Save** to apply your changes.

Page Settings

Page Settings allow you to specify individual pages that should be preceded by a doorway form. From here you can review or change your current doorway form setup for each page of your XSite to get the best results from your lead capture tools.

Lead Capture Tools

To change your doorway form setup for any page:

1. Choose between the **Show Active Pages** and the **Show All Pages** filters and indicate which set of pages you would like to view by marking the respective radio button.

Note: You can further filter what pages are shown by limiting the results to pages contained in specific sections of the **My Content** step in the **XSites Wizard** by choosing a section from the **Show the following XSite Pages:** drop-down menu.

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2. Choose a form, if any, from the **Doorway Form** drop-down menu to use as a doorway form for each page you'd like to contain a doorway form.

3. Next, designate whether you would like to require your visitors to fill out the form you've selected by checking the box in the ******* column next to the appropriate page of your XSite.

4. Finally, choose a contact group that you would like their contact information to insert their contact information into from the drop-down menu on the right.

Special Content Pages

Successfully configuring your website to convert traffic into leads is crucial, and is one of the most important aspects of setting up your website. To help you do this, we provide you with a number of Lead Capture utilities, including content pages which are built specifically for this purpose. These content pages are listed and explained below. You'll be able to activate each of these pages on your XSite by visiting the **My Content** step of your XSites Wizard.

Home Price Index

The **Home Price Index** uses information from Freddie Mac to estimate the value of a home based on its original purchase price. What's more, the homeowner can opt-in to receive quarterly updates, which your XSite (through XSellerate) sends to them automatically. This is one way to not

only capture a lead, but to use your XSite / XSellerate solution to stay in front of your clients continually.

To activate this page, simply check the box at the bottom of the window.

Industry Reports

Enabling the **Request Industry Info** page on your XSite provides visitors the ability to get access to the industry information they would like to see. By simply selecting the content pages you would like to make available from your content inventory, a visitor can now check the reports of interest and fill out their basic information. At that time, your XSite delivers the reports to them and the lead flows seamlessly into your **Contact Manager** for an easy follow up with XSellerate.

To activate this page:

1. Simply check the box at the bottom of the window.

2. Then, click the **Click here** to customize the content of the page and choose which reports you'd like to make available to your clients.

3. When you're done, be sure to save the page.

User Management

User Management

Before you begin creating or modifying your XSite, take a few minutes to set up the users who will be accessing your site. Even if you're the only agent in your firm, you'll need to ensure that you've got your own user account configured properly. If you work with several agents, or have staff assistants, this is the place to set those users up as well. Setting up a **User Account** in your XSite can also create an e-mail account in CertMail.

To create a new user for your XSite:

1. From the **My Office** window, click the **User Management** icon. The **User Management** window appears listing all of the user accounts you've established in the **Site Users** menu on the left side of the screen. If this is the first time you've accessed this function, you'll only see your primary admin account (the one you received when you bought your XSite).

2. Click the **Add User** button to create a new user. Or, click the name of an existing user in the **Site Users** menu to modify that account.

XSite Login & E-mail

The first step in creating a user is to specify their access information. Every user must have a **Username** which is different from any other user of any of our XSites. Instead of having you play a guessing game to figure out which names have been taken, XSite **Usernames** instead use your complete e-mail address instead. These are usually easy to remember and are always unique.

When setting up a user, you have two choices: either use your own, existing e-mail account from Yahoo, MSN or your own internal system, or use one of your CertMail accounts. Since CertMail accounts share your domain name (baytownproperties.biz), using these helps reinforce your website brand name.

1. Select the radio button for the type of e-mail address you'd like to use for this account, either External or XSite's CertMail

2. Type the e-mail address in the **E-mail Address** text box. If you're using an external address, make sure you include the complete domain name portion of the address (e.g. @baytownproperties.biz). If you're using a CertMail account, just type the name you'd like to use. Notice that your domain name is listed after the text box. If a CertMail account with this name does not already exist in your CertMail, the account will be created.

3. Enter a password in the **Password** text box.

4. If you'd like specific messages to be sent to your mobile device (phone, PDA, etc.) enter that address in the **Mobile E-mail** box. Now you can designate that certain messages from site visitors are forwarded immediately to that address.

User Management

5. In the **Mobile PIN** field, type a numeric code that you'd like to use when accessing your XSite from a mobile device. This is optional, but most users find it much easier to enter a number on a mobile phone or PDA than a text string.

6. If you're creating a CertMail user, enter the full name of the user in the **E-mail Friendly Name** field. This is the name that appears in the address field of messages sent from your CertMail account.

7. In the **Forwarding** text box, enter any e-mail addresses to which you would like e-mails forwarded. This is useful if you want to use a CertMail address as your public e-mail address, but use another mail server as your primary business tool.

8. Select the **Time Zone** for this user from the drop-down menu.

9. Finally, click the **Catch-All** account check box to designate this e-mail address as the one to receive any mail that is sent to your domain, but is not addressed to a valid user. This can be useful if you want to use a particular e-mail address temporarily.

Once your CertMail account has been created, a link is added to this section allowing you to log into your CertMail account.

User Information

In this section, complete as many fields as desired for the personal information related to your new user. Only the **First Name** and **Last Name** fields are required. The additional data can be used to create an entry on the **Staff Profiles** page in your XSite.

1. If you'd like to include this user in your **Staff Profiles** page, click the check box at the top of the form.

2. Complete the name, address and phone number fields, as desired.

3. Click the **Change** link to upload a picture of this user. When the **File Library** window opens, click the **Add New File** button, then click **Browse** and select an image file from your hard drive. Click **Open**, then **Upload** to add this image to your **File Library**. Select the file, and click

OK to place the image. To remove an image, simply click the **Reset** button.

4. To create a detailed, custom-formatted information or bio page about this user, click the **Change** link next to **Bio Text**. The **Content Editor** screen opens. From here you can type data, using the rich word processing commands found in the buttons, or copy and paste your text from any word processor. Click **OK** when done.

User Privileges

Not every user of your XSite should have access to all the features. For example, you might have a marketing assistant whom you want to have access to your XSellerate tools, but not be able to edit the site design in the Wizard.

1. Under **User Privileges**, click the check box next to the privileges you'd like this user to have on your XSite.

2. To complete your user setup, click the **Save** button in the lower right corner.

Deleting Users

To remove a user from your XSite:

1. Before deleting a user, make sure you access the CertMail account for the user and retrieve or forward any important e-mail messages. Once a user is deleted, all e-mail in that user's CertMail account is deleted permanently.

2. From the **My Office** window, click the **User Management** icon.

3. In the **Site Users** menu, click the link for the user you wish to delete.

4. Scroll to the bottom of the screen and click the **Delete this user** link.

5. A warning appears about losing the CertMail account. If you're sure you don't need any e-mails, click **OK**. The account is deleted and your available user limit is reset.

XSites Statistics

XSites Statistics

This is where you see which pages on your site have been getting the most traffic and from where. After logging into your XSite admin area, click **XSite Statistics** from the **My Office** screen. We've arranged this screen and the information so that you don't have to be an official webmaster to make heads or tails of the information.

- Most of the sections show you a page name and then stats going back a varying number of days. You can sort columns in these lists by clicking the column header (i.e. Clicking the "7" would sort on that column.)

- Likewise, you can pick your own date range for a category by picking your own start and end date and then clicking **Submit**.

Here's a brief description of each of the sections. The **Tell me more** link for each section also gives details.

- **Page Views -** This shows a list of your top pages and how many views they're getting. Your home page is usually your top page, but isn't it interesting to know what other content visitors are reading.

- **Entry pages -** An **Entry Page** is the first page somebody hit when they entered your site. If you publish articles or list URL's other than your domain, this shows how effective they were. For most, the home page will probably be the top entry page, followed by order management.

- **First time and returning visitors -** Whenever someone visits your website, their IP address and other information is logged on our servers. (Did you know that YOUR information is also sent to all the websites you visit?) So, we know if they've been to your site before and give you statistics here.

- **Referring URLs -** Another piece of information sent to a web server when a computer browses to a site is the last website you were viewing before reaching the server. Some of this information may be meaningless to you, but if you see a lot of "hits" that have Google or Yahoo! in them or maybe a news site where you posted an article, you'll know from where it is people are hearing about your site.

- **Common Search Phrases -** We analyze your referring URL's and pick out which ones are from search engines and also the text that led someone to find you there.

- **Listings -** This shows which of your listings is getting the most traffic.

If you're serious about web "hits", consider tracking the information we display here in a spreadsheet so you can get additional running totals and truly measure the success of your marketing efforts.

Search Engine Tools

Instead of requiring you to log into the various search engines and submit your pages one by one every time you make a change, we've given you the **Search Engine Tools** area of your XSite.

In addition to giving you an easy interface where you just mark the pages you want to submit, we also give you sound advice regarding how search engines think. Did you know that submitting your pages too often can actually penalize your ranking? Did you know that search engines, such as Google, would rather find you because somebody else linked to you? Did you know that failure to update your site regularly causes search engines to "forget" about you? We have full time people devoted to understanding search engines. This is where you get to take advantage of their expertise!

Google Sitemaps

Google Sitemaps provide an easy way for you to submit all your URLs to the Google index and get detailed reports about the visibility of your pages on Google. With Google Sitemaps you can automatically keep Google informed of all your web pages, and when you make changes to these pages, they automatically help improve your coverage in the Google crawl.

To enable Google Sitemaps:

1. Hover your cursor over **XSite** in the toolbar at the top and click **Search Engine Tools** in the toolbar that appears.

2. Write down the Sitemap URL listed in the box half way down the page.

3. Go to the http://www.google.com/webmasters/sitemps

Mobile Tools

4. Log in using your Google Account Username and Password or create a new free account to use with your XSite.

5. Click the **Add** tab.

6. Ensure the **General Web Sitemap** option is selected and click **Next**.

7. When prompted to **Enter your Sitemap URL below** enter the Sitemap URL you wrote down in step 2.

8. Click **Add Web Sitemap**.

9. You should now see your website listed on the **Site Overview** page. Click the **Verify** link next to it.

10. You will be given a verification file name similar to: GOOGLEd24324134a2a.html.

11. Copy and paste the verification file name into the **Verification File** field in the Google Sitemaps step of your XSite.

12. Click **Save** when finished.

Your Google Sitemaps are now enabled. As you continue to edit the pages on your site, Google automatically updates their information with the latest content.

Page Submissions

The page submission tools that come with your XSite can be a great way to ensure that major search engines are aware of the latest changes you've made to any page on your XSite. To submit a page to search engines:

1. Hover your cursor over **XSite** in the toolbar at the top and click **Search Engine Tools** in the toolbar that appears.

2. Click **Page Submission** in the SEM Tools pane on the left.

3. When the list of pages you've included on your site appears, mark any pages you wish to submit to search engines and click **Submit**.

Note: Submitting your site pages to search engines too frequently can actually cause search engines to disregard your efforts and dock your placement in search results. For best results, limit yourself to submitting new pages to search engines once a month.
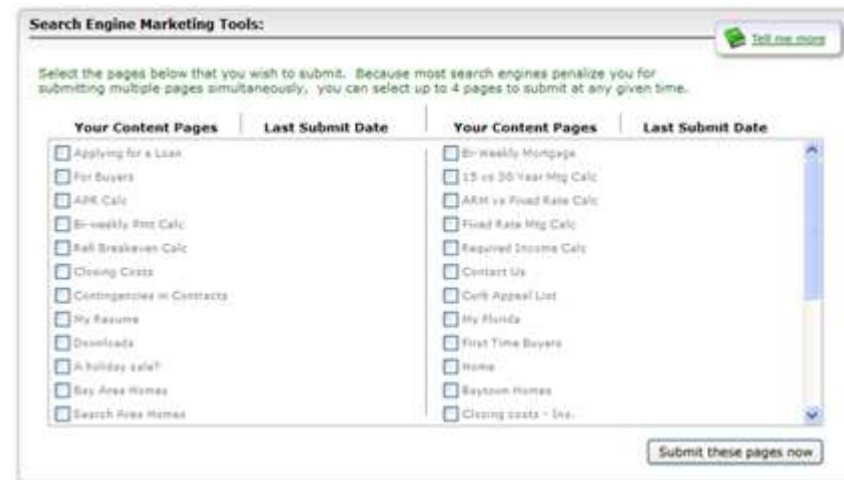
Mobile Tools

Agent XSites unleash the power of your mobile Internet connection and make you a true "mobile professional" - always in touch, even when on the go.

- View and update your listings

- Send and receive e-mail from your CertMail account

- Update your contacts or add new ones

- Have convenient access to maps, driving directions weather and other information essential to a mobile pro.

Your clients won't have to wait for you to get back to the office before getting the status information they constantly crave. And you reinforce your image as a responsive vendor that's truly "on the ball".

To use the Mobile XSite features: All of the features on your Mobile XSite are web based, so your mobile device will need an active Internet connection. Then, use the web browser on your mobile device to navigate

Mobile Tools

to your XSite's URL (i.e. www.baytownproperties.com) followed by **/mobile**.

Then, use your regular XSite **Username** and **Password** or the **PIN** number specified in your account information.

Note on navigation in your Mobile XSite: Instead using the browser's **Back** button, use the back and "main menu" links inside on the Mobile XSite screens. This is because the data and options on the screens may depend on what you were viewing previously and the XSite can't tell the next screen what to do if you're using the browser **Back** button and viewing whatever was in the your system's cache.

Internet Access in the Field

Before using your Mobile XSite, your Pocket PC needs to be equipped for Internet access.

- Wireless networks such Cingular, Sprint and Verizon typically offer Internet access and charge by the amount of data you send or receive (not by the minute). Call your mobile provider and see what they offer.

- Many Pocket PC's come equipped with a WiFi card so that you can connect to the Internet through the same type of "hot spots" used by laptops. This may be convenient if your area has a number of these.

- Another common way to connect a Pocket PC to the Internet is to have it access the Internet using the Internet access on your mobile phone. How does the Pocket PC "talk" to your phone? Typically through Bluetooth. A lot of the newer cell phones and Pocket PC's have Bluetooth built-in so this option may only require you to pay for Internet access on your mobile phone – no extra hardware.

Mobile Listings

Having your listings data up to date is critical to serving your seller's interests. Mobile XSites can help by giving you instant access to existing listings, as well as the ability to add new listings on the fly.

1. To work with your listings, tap the **Listings** icon in your Mobile XSites home page.

2. You're presented with a summary of the listings in your database, grouped by property type. Tap one of the groups to view those properties, or tap the **Add Listing** link.

3. If you're adding a new listing, enter the property address and sales price info, then tap **Add**. Otherwise, tap the address of the listing you need to update.

4. Now, tap the **Edit** link next to the type information you need to enter or change: **MLS Info**, **Property Info** or **Other Info**. At the top of the page are links to view a photo or map of the property.

5. Edit the information as needed and tap **Save**.

That's it. The information is updated on your web site for all visitors to see.

Maps & Driving Directions

You just say how you can pull up a map to any of your existing listings. But what if you need a map or driving directions to some other property? No problem. The Mobile tools on your XSite have you covered.

1. Tap the **Maps** icon on the Mobile XSite home page.

2. Enter the address, city, state and zip for the property you'd like to find and tap the **Find** button.

That's it! From here you can download driving directions as described next.

Driving Directions

Once the map has been downloaded, we can also retrieve driving directions. Just tap **Directions**.

1.   Now, choose your starting point:

- If you're at the office, tap **My Office**, and you'll get directions starting from the address found in your profile in your address book.

- Or, if you're not at your office, tap **Other Address,** enter your starting point and tap **Get Directions**.

2.   Finally, just scroll through the directions to see which roads to take.

Mobile Tools

Weather

Need the forecast before you schedule an appointment or showing? Your Mobile XSite has you covered. From your Mobile XSite home page, just tap **Weather**.

Once again, using the address already on file, you can receive an up to the minute weather forecast without having to turn on the TV or browse a website from your desktop PC.

Google Search

Why wait till you get back to the office to find out about something on the web? Your Mobile XSite has a convenient link to Google's mobile page. Just tap in your topic and then tap **Google Search**.

Your search results are formatted for your small Pocket PC screen. If you see a topic description that matches your search, just click it.   Or you can view additional results by tapping the link at the bottom of the list.

Calendar & Contacts

The calendar and contacts on your Mobile XSite are simplified interfaces to the full versions of your Agent XSite – giving you just what you need when you're in the field and need quick information.

- To access your contacts, tap the **Contacts** icon after loading your Mobile XSite. We'll list eight contacts at a time in alphabetical order by last name. Get to the next set of contacts by clicking the ">" below the list. From your Mobile XSite, you can add a new contact – just the basic information, then fill in the rest later – or search for a contact using the links at the bottom of the screen. When viewing a contact from a mobile device such as a phone, you can tap their number and have it dialed right from the contacts screen!

- To access your schedule for the current week, simply tap **Calendar** from the main Mobile XSite screen. From here, you can also add a new appointment or task.

Remember, when you're through accessing your contacts, click the **Main Menu** link at the top of the screen!

E-mail

Once again, why wait until you're back at the office to receive or send e-mail? Your Mobile XSite offers a simple and quick interface for your CertMail account.

It starts with the login for you Mobile XSite which is simply your CertMail address and password. Once you're logged in, tap e-mail.

Managing Domains

- You'll first see your inbox and most recent messages. To read a message, just tap the subject line. Once you're in a message, it's just like regular e-mail, you can reply, forward. etc. To get back to your message list, tap **Close**.

- To get to folders other than your Inbox, tap **Folders**. You'll see a list of subfolders under your **Inbox**. To access one of the folders and the messages in it, just tap it. To get back to your **Inbox**, just tap **Go up**.

- You can get to other folders, not just those under your **Inbox**, by tapping **Go up a level...** Here, you'll see your **Sent Items**, **Deleted Items**, **Drafts**, Etc. Once again, just tap the folder you need.

Managing Domains

Your XSite comes with your own new domain name or ".COM" (or .NET or .ORG or several others) address. When you first launch the site, you're given the opportunity to choose the primary domain name that people will use to access your web pages. As you mull over this critical decision, keep these pointers in mind:

- Try to pick a name that is easy to remember. The more complex the name, the harder it will be for people to type it in from memory. If possible, just choose the name of your business.

- Make it something you can easily say aloud and so that you do not have to spell it out for your clients. After all, you want it to be easy to remember with no room for error when your voice mail message refers people to your website.

- Likewise, avoid punctuation such as dashes and underlines if at all possible.

- Pick something that is pertinent to your business or location (or both). Even better, use a name that contains a "keyword" for your industry.

- When entering a web address, most people use the default ".COM" by habit. While there are other extensions available (.NET, .ORG, .BIZ for example) be careful picking a domain name for one of these if your competitor has the .COM version of that address.

It is important to note that even though you're registering your domain name through a la mode and using it in conjunction with your XSite, you still own the rights to this name. For convenience, a la mode will be listed as the technical contact with the domain name registration company. But you are the administrative contact and have full control over the use of your domain name.

Choosing Your First Domain

The first time you access your XSite, you're presented with a dialog box to help you register the primary domain for your XSite. Of course, the first step is to ensure that the name you want to use is available.

- Type the name you'd like to use in the text box. If necessary, use the drop-down menu to select an extension other than .COM.

- Click **Check Availability** and our servers will scour the internet to see if your preferred name has been taken.

Managing Domains

- If the name you picked is not available, your XSite will suggest some variations on that name that are. You can choose one by simply clicking the name or, click the **Try Another** button to return to the previous screen and enter another name.

- Once you find a domain name that is available, click the **Register This Domain** button.

💧 **Note**: Once you've registered the domain name, it normally takes 24 to 48 hours for it to become "live." The Internet is a big place and it takes a while for all of the domain name servers to get this new information.

If you're not ready to register a domain name at this time, or you'd like to use an existing domain name with your XSite, just click the corresponding link at the bottom of the registration screen. Don't worry. You can always come back and do it later at any time. To do so, from the **My Office** screen, click the **XSites Wizard** button, then choose **Manage Domains** from the **Extra Tools** menu pane on the left side of the admin window.

Using an Existing Domain Name

These days, it's just as likely that you've already registered a domain name that you'd like to keep. You can easily associate your existing domain with your XSite by simply contacting your domain registrar and changing your domain's name servers to point to a la mode's. Here's how:

- **If you're just beginning to set up your XSite**: Click the link at the bottom of the screen to begin the transfer process.

- **If you've already set up your XSite**: Click the **XSite** button, then choose **Manage Domains** from the **Extra Tools** menu pane on the left. Finally, click the **Transfer** button.

- In the **Domain Transfer** window, type your existing domain name into the text box.

- Now contact your domain name registrar (the company you bought your domain name through or the company that manages it for you). Chances are, they've got a web page where you can update your DNS information. Otherwise, you may have to call them and provide the information over the phone. Click here to view our Tech Doc with specific instructions.

💧 **Note**: If you purchased your existing domain name from one of the domain registration services listed below, or if your domain is managed by an internal IT department, you'll need to follow some different steps. Click here for our Tech Doc with specific instructions.

- o eNom.com

- o domainguru.com

- o ecommerce.com

- o registerfly.com

Managing Domains

Unfortunately, transferring a domain name is a process that depends largely upon your existing domain name registrar – a company over which we have no control. We recognize that this can be frustrating and we've done all we can to help streamline the process. Remember that at any time you can contact our Help Line at 1-800-211-4514 for additional assistance.

Managing Multiple Domains

To manage the domain names associated with your XSite, from the **My Office** screen, click the **XSites Wizard** link, then choose **Manage Domains** from the **Extra Tools** menu on the left. The domain names currently associated with your XSite will appear on the screen. Just click the **Manage My Domains** link to add or change your domains.

Some companies find it advantageous to have multiple domains all pointing to the same site. This can be particularly useful if you want to "lock up" several domain names with different versions of your name. For example, you might want to register the plural form of your name (myproperty.com and myproperties.com or myappraisal.com and myappraisals.com). Or, perhaps you do business in multiple cities in a particular area.

You can host as many domains as you want on your XSite at no additional charge. Of course, you'll need to purchase those domains from a la mode or use the transfer functions to have your existing domains moved to your XSite.

Additional domains are added as "secondary" domains. Whichever domain you have chosen as your "primary" domain (usually the first domain name you registered) will be automatically renewed with your XSite, unless it was registered previous to your XSite purchase, in which case you will continue to renew it through your existing domain name registrar.

For any secondary domains purchased through your XSite, you will be notified by e-mail one year from the date of purchase with the option to renew that domain. We'll also send you an e-mail notification 20 days and then 5 days prior to the expiration date. To renew the domain, simply click the "Renew Now" link. If you choose not to renew the specific domain name, simply do nothing.

Registering Additional Domain Names

- To register a second domain name, click the **Register** button.

- Type the name you'd like to use in the text box. If necessary, use the drop-down menu to select an extension other than .COM.

- Click **Check Availability** and our servers will scour the internet to see if your preferred name has been taken.

- If the name you picked is not available, your XSite will suggest some variations on that name that are. You can choose one by simply clicking the name or, click the **Try Another** button to return to the previous screen and enter another name.

- Once you find a domain name that is available, click the **Register This Domain** button.

Switching Primary Domains

If you have more than one domain name associated with your XSite, you'll see them listed in the **Manage Your Domains** screen. Your Primary domain is the one which is associated with your CertMail e-mail system. Note that only one domain name can be associated with CertMail at a time.

If you would like to switch to one of your secondary domain names, simply click the **No** link next to the domain name you want to use.

Note: If you switch to a new primary domain name, ALL of the e-mail associated with the old account will be deleted immediately. This includes all e-mail boxes you may have created for this account. If you need to keep this data, contact our support department for assistance.

CertMail

CertMail

CertMail is a la mode's high-end e-mail service - designed to accompany our XSites. Just as XSites are more than mere web hosting CertMail goes way beyond simple e-mail messaging. Some added features include:

- Server-side virus protection and spam filtering

- SureReceipts feature that sends a guaranteed receipt no matter what e-mail client the recipient has.

- E-mail forwarding for each e-mail address

- A web interface, so you can access your e-mail from any Internet PC without installing software (as long as you have your password)

- Support for POP3, SMTP and IMAP protocols for use in Outlook or other e-mail clients.

- A web-based calendar and address book that are compatible with Outlook and many other real estate specific applications.

Logging in to CertMail

The primary (and easiest) way to access your CertMail account is from the **My Office** page of your XSite's administration page. From here, simply click the CertMail icon ![icon] in the menu bar. See the Logging In section of your XSite user manual for instructions on accessing **My Office**.

Alternately, you can go to http://www.certmail.com/ and login manually by entering your entire CertMail e-mail address (including the "@" sign and domain) along with your **Password** and clicking **Login.**

Creating & Managing Accounts

Initially, your CertMail service has one account created based on the contact information in your administrator account. Depending upon the level and type of XSite you purchased, you may have several more accounts available. New CertMail accounts are created at the same time you create new User accounts on your XSite.

To learn how to create User accounts, consult the User Management section of your XSite user manual.

Forwarding E-mail

Each of your CertMail accounts can have a list of other e-mail addresses to which it can forward a copy of its messages. This is handy in cases where your e-mail client is already setup to read mail from one service and you don't wish reconfigure it. To setup e-mail forwarding:

1. Log into your CertMail account and click the **Options** icon ![icon] in the toolbar.

2. Scroll down to the **E-mail Forwarding Options** section of the page.

3. Now, in the **Forward to** text box, enter an e-mail address to which you want your CertMail messages forwarded and click **Add.**

4. Repeat step 3 for other e-mail addresses you want to receive your forwarded messages.

5. Mark whether or not you want a copy of the forwarded messages saved on the CertMail server. If you don't plan on accessing your CertMail account directly from the web client or tying CertMail into your e-mail program, be sure want to mark this option.

6. Then, click **Save** when you are through.

      -- OR --

1. Log into your XSite admin and click **User Management**. Choose or add an account to setup e-mail forwarding.

2. Now, in the **E-Mail Forwarding** text box, type each address you would like to forward e-mail to, separating each e-mail address by a ";" and a space.

3. Then, click **Save** when you are through.

Removing Forwarding Addresses

If you no longer wish to have messages automatically forwarded to any or all of the accounts you previously entered, do the following:

1. Log into your CertMail account and click the **Options** icon ![icon] in the toolbar. Scroll down to the **E-mail Forwarding Options** section of the page.

CertMail

2. Click the address you wish to remove, then click **Remove**. Repeat this for other addresses that may be listed.

3. Click **Save** when you are through.

-- OR --

1. Log into your XSite admin and click **User Management**. Choose or add an account to setup e-mail forwarding.

2. Now, in the **E-Mail Forwarding** text box, remove any or all of the e-mail addresses you have listed.

3. Then, click **Save** when you are through.

Catch-all Accounts

The "catch all" account is where messages that don't have a proper recipient go. For example, using the catch-all feature, you would still receive e-mail sent to misspelled e-mail addresses or sent to deleted accounts. By default the "admin" account is also the catch-all account, but, you can reset it to any another account. To do so:

1. Log into your XSite admin using your administrator account.

2. From the **My Office** screen, click the **User Management** icon ![icon].

3. Under the **Site Users** pane, click the link for the user whose account you would like to use as your "catch-all."

4. Scroll down and click the check box labeled **Make this my 'Catch-All' account**. If another account has already been designated as the catch-all, you are warned that changing your catch-all account removes the catch-all features from your previous catch-all account.

5. Click **OK**.

6. Finally, scroll down and click **Save**.

 Note: While using the catch-all feature is a great way to ensure that you do not lose e-mail sent to you with an incorrect e-mail address, the e-mail account using the catch-all feature can often acquire more spam e-mail

messages since a spammer could still send you spam using a non-existent e-mail address.

User Options

When individual users are logged into CertMail, they can access settings pertaining to their account by clicking the **Options** icon ![icon] in menu bar.
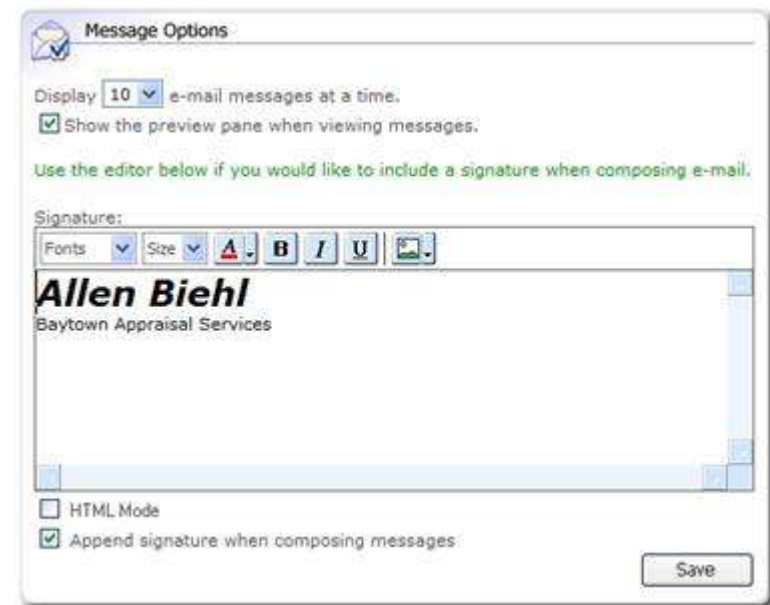
CertMail

To set your CertMail options:

- Choose the number of messages to display on-screen using the drop-down menu at the top of the screen.

- Below that, click the option to turn on or off the "preview" pane. This displays the contents of an e-mail message without having to open it.

- If you would like to include a default "signature block" whenever you compose a new message, type that information into the **Signature** text box. Notice that you can format your text font, size and color, as well as adding an image from your XSite's File Library. You can also tweak the signature by clicking the **HTML Mode** check box and editing the underlying code. Finally, make sure you check the **Append signature...** check box to enable this feature.

- Individual users can also configure their own e-mail forwarding addresses. See the Automatically forwarding E-Mail with CertMail section of this user guide for more details.
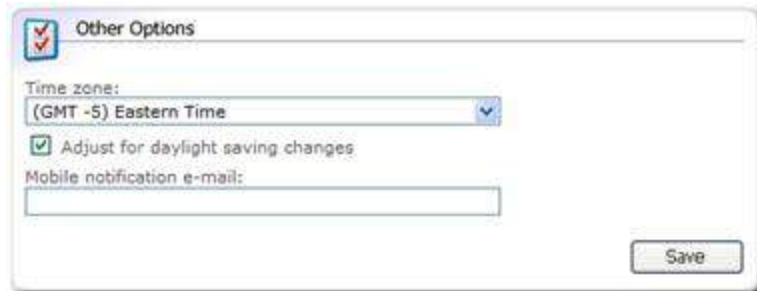
- If you plan on using the schedule functions in your XSite, you'll want to be sure to set your local **Time Zone** — and daylight savings settings — so that reminders occur at the right time.

- The **Mobile notification e-mail** address is used for automatically sending reminders and scheduling alerts to your mobile device. If you don't know how to e-mail your cell phone, contact your mobile provider for the domain to use along with your phone. (For example, if you had a phone from AT&T wireless, your phone's e-mail address would be your ten digit wireless number @mobile.att.net.)

Usage Reports

While accessing your e-mail, you can also gather some information about the state of your account. Click the **Reports** icon in the toolbar to display the details of your account.

On this screen, you can see at a glance when the account was created, how much space it's using, the number of viruses the system has blocked, as well as the total number of messages in your **Inbox** and their average size. If you're running low on space, click the icon to order more. Also from this screen, click the icon to order additional CertMail accounts.

Viewing Your Usage Overview from WebMail

In addition to the full blow **Reports** tool inside your CertMail web client, we've also included a smaller overview tool inside the CertMail web client to help you determine, at a glance, how much space you're using. To take advantage of this tool, just login to your CertMail on the web and look for the **Mailbox Details** pane on the left side of your mailbox.

Each section in this pane should outline how much space you're currently using or currently have remaining in your CertMail account. If you'd like to switch to the more robust reports tool from here, just click **More Info** at the top.

Spam Filtering & Setup

CertMail comes with a server-side Spam filter that detects the most common forms of unwanted e-mail and handles it for you without cluttering up your **Inbox**. You can decide how that mail is treated, and also configure

CertMail

your own lists of "Safe" and "Blocked" senders, giving you the ultimate say on what messages get through.

The administrator account for your XSite has the power to change how junk mail is handled and decide if individual CertMail accounts can add addresses into the "Safe" and "Blocked" lists.

- Log in to your XSite with your **Username** and **Password**, or use the administrator **E-mail account** and **Password** when logging in from certmail.com.

- From the **My Office** screen, click the **CertMail** icon in the menu bar, then click **Admin** 🔒.

- To enable Spam filtering, simply check the box at the top of the screen.
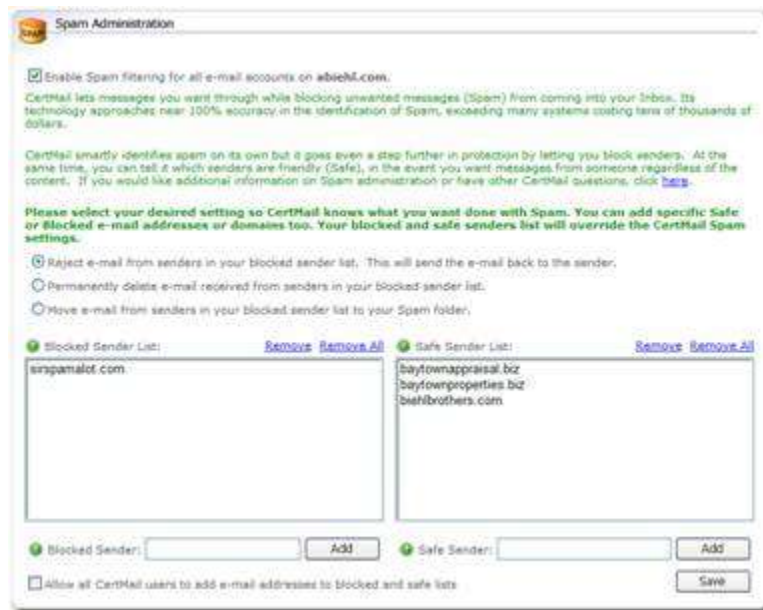
When enabled, you have three choices on how messages identified as Spam are handled.

- If you would like the messages rejected, but want to notify the sender that you've blocked it, click the first option.

> 💧 **Note**: Many spammers use automated replies to identify "valid" e-mail addresses. Selecting this option may actually increase the amount of Spam that gets sent to you.

- If, on the other hand, you simply want spam to go away, click the second option to automatically reject it.

- Finally, select the third option if you'd prefer to have spam sent to a specific **Spam** folder, where you can sift through the messages later to ensure that no messages were incorrectly marked as spam. This is the default setting.

The administrator also has the ability to add specific e-mail addresses, or entire domains to the **Safe** or **Blocked** lists. If you're getting messages from someone or from a particular company, that you'd rather not receive, you can add them to the **Blocked Sender List** in the spam filter. Even if our servers haven't identified this person or company as a spammer, you won't get messages from them. On the other hand, there may be some customers from which you always want to receive e-mail. To ensure that mail from certain customers is never rejected, add them to the **Safe Sender List**. To add someone to your **Blocked Sender List**:

- In the **Spam Administration** screen, scroll down until the **Blocked Sender List** text box is visible.

- Type the specific e-mail or domain name you want to block in the text box. If you enter an e-mail address (badguy@spamsender.com), any mail received from that specific address will be blocked. If you add a domain name (spamsender.com) then e-mail from anybody using that domain name is blocked.

- After typing the name, click **Add** to put it into the list. Repeat these steps for as many names as you like.

Adding names to your **Safe Sender List** is just as simple.

By default, only the administrator can add addresses to the safe and blocked categories. However, if you'd like any of your users to designate

CertMail

safe and blocked senders, you can mark the **Allow all CertMail users to add e-mail address…** option located below the list boxes.

Using the Spam Filter while Reading Mail

Depending on access rights granted by the CertMail "admin" account, individuals can add people to a "blocked" or "safe" list by right-clicking the message as they are viewing it in the CertMail Web client.

Note: If you don't see these options when right-clicking a message, check with your CertMail administrator.

CertMail Web Client

CertMail can be accessed via your browser or by using a familiar e-mail client such as Microsoft Outlook. The benefit to using the web client is that there's no "set up." You can begin using it right away. Plus, it imports contacts from Outlook, so you don't have to worry about losing your address book.

Composing & Sending Messages

Here's how you send standard e-mail using the CertMail Web Client.

1. After logging into WebMail, click **Compose**.

2. Enter the recipient in the "To" field. You can separate multiple recipients with a semi-colon.

3. Optionally, enter recipients you wish to "carbon copy" or "blind carbon copy" respectively in the "Cc" and "Bcc" fields. (A "Bcc" means the other recipients won't know that person was sent the message.)

4. Enter your subject line for the message.

5. If you need to attach a file, click **Add File**. Then, click **Browse** and find the file you wish to attach to the message and click **OK**.

Note: To ensure the speed, reliability and security of CertMail, we do limit your message to 10 MB in total size. Typically if you need to transfer a file of more significant size, you would need to find an

alternate method then e-mail anyways as your recipients may not be able to receive a file of such magnitude.
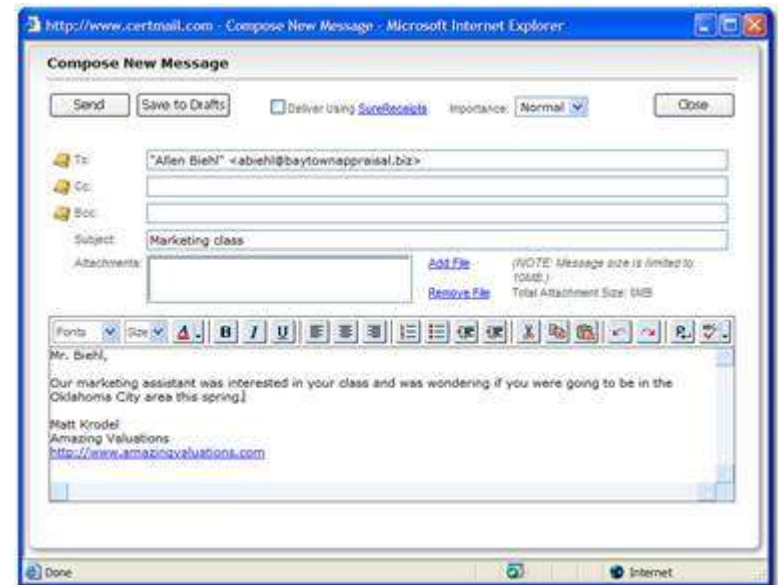
6. Now, type your message. This is a word processor style interface that generates an HTML e-mail message – the standard for e-mail today. If you don't have time to finish the message, you can click **Save to Drafts** to place it in your CertMail **Drafts** folder.

7. The **Importance** drop-down is also standard for e-mail. Something with high importance displays with a red exclamation point. Low priority messages are displayed with a blue arrow pointing down.

8. Click **Send** when you want to send the message and a copy is automatically saved in your **Sent Items** folder.

Managing Folders & Messages

The CertMail WebMail client offers much of the functionality you'd find in a standard

CertMail

desktop e-mail client. You can have as many folders as you like with nested subfolders. Categorizing messages into folders makes them easier to find and helps. Here's how you add a folder.

1. First click the "parent" of the folder. For example, if you wanted the folder to be a subfolder of your **Inbox**, click **Inbox**. If you want it on the same level as your **Inbox**, click the item for "Mailbox" followed by your account name.

2. Click **New**.

3. Type the name for the folder.

4. Then, click **Save**.

Here are some other tips when viewing messages:

- You can sort your list by clicking a column heading.

- When selecting messages to move or copy to another folder, you can select a block of messages by clicking the first one in the block and then using **Shift+Click** to get the last one in the block. All messages in between those will be selected.

- Select multiple non-sequential messages with **Ctrl+Click**. This means highlighted messages remain selected when you click others.

- The **Refresh** button above your message list checks for new messages sent since you first logged into your mailbox.

- Instead of reading messages in the preview pane, you can double click them and reveal functions such as printing and a quick way to add the sender to your address book.

Setting up a Message Footer

Instead of having to type your name and other information at the bottom of each message, you can setup a default "footer".

1. While in the WebMail client, click **Options**.

2. In the field for signature, enter your e-mail footer. Commonly, this is your name, title, etc. If you are familiar with HTML, you can enter code directly into this field by marking that option.

Note: You can go back to design mode by unchecking the box.

3. Check **Append signature when composing messages** to attach your footer.

4. Then, click **Save** to lock in your changes.

To get back to WebMail, just click the shortcut at the top of the window.

Sending a Message Using SureReceipts

SureReceipts is a feature in your CertMail that allows you to get a true receipt on messages you send. Unlike receipts built into programs like Microsoft Outlook, SureReceipts doesn't depend on the recipient using Outlook or confirming that they want to send your receipt. As an added bonus, the delivery mechanism built into SureReceipts overcomes common file-size limitations with attachments, so you can send any size files you want. Here's how you use it:

1. SureReceipts requires the CertMail web client, so log into the web client.

2. Now, click **Compose**. Fill out the recipient's e-mail, the subject line and everything else as you normally would.

3. Add attachments if needed as well.

4. Now, click the option for **Deliver using SureReceipts**.

5. Then, click **Send**.

For you, it's like sending a regular e-mail message. However, your recipient sees something a little different when your message arrives.

They won't see your text or attachments. Instead, they get a notification that a message is waiting for them and a hyperlink to click. Once they click the link, they are taken to a message pickup area on our CertMail server. And you are sent a "receipt" back in e-mail. Then, the page they see has your message on it in addition to individual links for each of the attachments. When the recipient clicks each of the attachments you receive additional delivery receipts indicating that they have received each of your attachments.

Contacts

Outlook® & Other E-mail Programs

Our CertMail servers are just as powerful, if not more powerful than what your ISP would provide – especially considering we pre-scan your e-mail for viruses. In addition, CertMail supports both POP3 and IMAP configurations in your e-mail client. Here are some advantages to using IMAP over POP3 for connecting to CertMail.

POP3

With POP3, your messages are downloaded and typically erased from our server. That means that two computers shouldn't access the same account, and if something should happen to a PC downloading the messages, they would all be gone.

 Note: In Outlook you can configure a POP3 setup that prevents your e-mail from being deleted from the server. If you choose to do so, click the link corresponding to your version of Outlook below.

- Click here to set up Outlook Express via POP3

- Click here to set up Outlook 2003 via POP3

IMAP

 The more modern IMAP saves the messages on our server – you can access them from multiple PC's or use our web interface. You can even add and manage folders for your messages on the server. This is often important for real estate professionals who are often on the go and using multiple computers.

Depending on your e-mail client, there are different settings for configuring it for CertMail via IMAP.

- Click here to set up Outlook Express

- Click here to set up Outlook 2003

- Click here to set up Outlook (2002 version or later)

- Click here to set up older versions of Outlook

Contacts

Your complete address book can be stored online with Contacts in your XSite and CertMail. Like the rest of your XSite, it only takes a browser to access it. You should find the contacts easy and intuitive to use and also enjoy features like being able to store company information so it doesn't have to be retyped for each contact in one office as well as being able to group contacts into categories you setup yourself.

- If you're accessing contacts through your XSite, just click **Contacts** in **My Office**.

Otherwise you can also access them through CertMail WebMail.

- After logging into CertMail, just click **Contacts** to get to your address book.

Each XSite and CertMail account you create gets its own list of contacts so if you need to keep them separate, you're equipped to do so.

Contacts

Viewing Contacts

There are several ways to view the contacts in your database. These are accessed from the **View** menu in the toolbar.
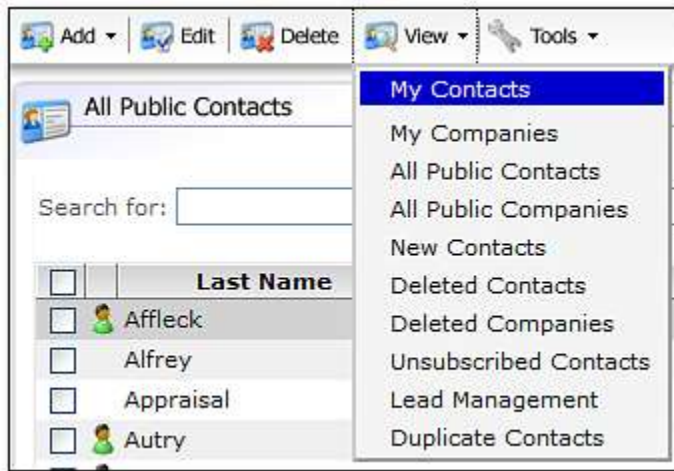
- The **My Contacts** view shows all of your contacts in alphabetical order, including their **Last name**, **First name**, **Company**, **E-mail address** and **phone number**. You can use the **Options** button to select which phone number is displayed in this view.

- The **My Companies** view shows all of your contacts grouped by the name of their company. Companies that have entries will have a plus sign (+) next them. Click the plus sign (**+**) to expand the company and see contacts associated with it.

- **All Public Contacts** shows all contacts that are marked as **Public** contacts whether they are contacts in your account or other accounts on your website.

- **All Public Companies** shows all companies marked as **Public** companies whether they are your companies or companies in other accounts on your website.

- The **New Contacts** view only shows those contacts that have been recently added to your database, whether you entered them manually, or

their data was captured from your XSite. How long a contact appears as "new" is controlled in the Options.

- **Deleted Contacts** and **Deleted Companies** show you just that – contacts and companies that have been flagged to delete.

- **Unsubscribed Contacts** shows you a list of contacts that have indicated they want to unsubscribe from your mailing lists.

- If you are the administrator of the XSite, you can see a fourth view option. The **Lead Management** view shows all of the new contacts that are included in any of your XSite users' databases. This allows you to manage new contacts as your employees enter them to ensure that they're being followed up on properly.

- **Duplicate Contacts** shows you a list of all contacts for which there are probable finds duplicates. You can use this tool to ensure that you don't have unnecessary data in your contacts list.

 Note: As you change Views, the tools that are available in the **Tools** menu change to accommodate your selection. If you are unable to find tools mentioned in this manual in your list, you may need to switch views.

Searching for Contacts

When you go into your Contacts database, you're first presented with a list of the all contacts in your database. We've given you several options for locating a particular entry when in this view.

- Search contacts by entering a search phrase and picking the field you wish to search. Then, click **Find**.

- Filter the list quickly by last name by clicking a letter in the toolbar.

- Click **All** to reset your list to show all contacts.

Contacts

- You can also filter by group using the **Groups** drop-down at the top right or filter by contact type using the **Types** drop-down. See the Group management section of this manual for more information about contact groups.

- Clicking any of the column headings sorts your contact list by that column. So, if you want to view your contacts sorted by first name instead of last, just click the **First Name** heading.

- Double-clicking a contact in your list brings up their complete record, and you can edit the contact information there. When you're done viewing/editing the contact, just click **Save** or **Cancel** to go back to your list.

- Move from one page of contacts to the next using the back and next links at the bottom of the screen.

- The [icon] icon indicates that the contact has been associated with an XSite user account in your XSite's User Management.

- The [icon] icon indicates that the contact is new.

Then, you can change your contact options by clicking **here** in the toolbar at the bottom of the screen. To get back to your WebMail after viewing contacts, just click the **WebMail** icon in the toolbar.

Adding and Editing Contacts

Having an address book naturally keeps you from having to retype e-mail addresses. Plus, the contacts you add integrate with our other products and features that rely on an address book. A little later, we discuss importing them from applications such as Outlook.

In the Contact Manager, click **Add** and then click **Add Contact** in the menu.

If you want to edit an existing contact, simply select it from the contacts list, then click **Edit**. Alternately, you can double-click any contact to open it.

The left section of the **Contact Editing** screen shows the different sections of information for each contact. At a later time, you may wish to mark the items you always want expanded when viewing contact details. By default, all the items are marked and expanded. You can expand and collapse individual sections by clicking the arrow on the right of the section header.

For now, let's look at the sections on the right starting with contact information.   Don't forget to scroll down to see all the items.

- **Contact Information** – The first section of your contact data includes all the basic name, title and company information. The **Company** field in the **Contact Information** section allows you to select the name of the company for which your contact works. This saves you from having to retype the same information when several contacts work for the same firm. When you select a company name from the list, the contact's business address information is pulled into the record automatically. If no company name is selected, then the business address fields under street addresses is not displayed.

- If you need to add a company name on the fly, just click **New** next to the company field, enter the company data, then, click **Save**. Then fill out each of the following sections.

- **Type of Contact** – Since your XSites Contacts module is designed for real estate, we've set up predefined categories for each contact. These help you when searching for specific contacts later. Click the box next to all of the categories which apply to this contact.

Contacts

- **Phone Numbers** – Enter all that apply.

- **Street Addresses** – If you chose a company name under the **Contact Information**, the business address information for that company is displayed here. You can also enter a personal or home address for this contact.

- **Online Addresses** – Each contact can have up to 3 online (e-mail) addresses. The one you mark as primary is used as the default when composing e-mail.

- **Licenses and Certification** – If your contact is a member of a professional organization, or holds a particular certification, you can enter that information here. Click **Add**, enter the relevant information and click **Save**.

- **Loan Program** – If you're a Mortgage XSite user, you can note the Loan Program and details in your contact information in this section. See the Adding loan programs to contacts section of your XSite manual.

- **Groups** - In addition to categories, you can also place contacts into "groups" you define yourself. To add a new group, just click **Add**, type a name and click **Save**. See the Group management section of this manual for more information on managing groups.

> **Note**: Groups don't have to be by "occupation." You can use groups to denote new contacts, trainees, hot prospects, or whatever. This forms the core of your future marketing efforts, so take some time to build groups that make sense for how you do business.

Manage your existing groups by clicking **Manage**. Once you have your groups created, click the check box next to all of the groups that apply to this contact.

- **Notes** – Once you've created and saved a contact, you're able to create a notes document for that person. Notes can be any data you wish to remember that doesn't fit readily into any of the standard fields. Birthdays, favorite donut flavors, spouse's names, you name it.

- In addition, you can use the **Notes** field to create a "tickler" that reminds you to do something for this contact. Click **Add** to begin adding your information. At the bottom of the screen, click the **Create a new...** check box, then select an item type from the drop-down.

- Enter a subject, start time and ending time for this task. Then, select how far in advance of the event you want to be notified and click **Save**. When your event nears, you receive a notification.

Once you've entered or edited all of your contact's information, be sure to click **Save** at the bottom of the screen. Or choose **Save** from the menu at the top.

Managing Multiple Contacts

At times you may find it necessary to update an entire batch of contacts at once. For just such occasions, we've added a tool in Contacts to allow you to modify a group of contacts you specify. To take advantage of this tool:

1. Select the contacts you wish to edit by checking the boxes beside each.

2. Click **Edit** in the toolbar.

3. When the **Edit Contacts** window appears you can:

   o Assign or reassign the contacts to a company if these contacts are your contacts. To do so, just choose the company you want from the **Assign Contacts to Company** drop-down.

   o Toggle whether the contacts are **Public** or **Private** by checking the **Update contacts as** box and then marking the option you want.

   o Assign contacts to groups if they are your contacts. To do so, mark the group or groups you want to add the contacts to using the available boxes. To create or manage your groups, just click **Manage Groups**.

   o Assign contacts to a certain type by checking the appropriate type boxes in the **Assign your Contacts** section.

Contacts

When you're finished making the changes to your contacts, click **Save** to update them.

🌐 **Note**: Different options may appear in the screen depending on the contacts you select. If all the contacts you select are your contacts, you should see the screen that appears here. If you select any public contacts that belong to another user in your XSite, you may see a different screen when you attempt to modify them.

Moving/Copying Contacts

For those occasions where you need to move or copy contacts to another XSite users account, we have added a move/copy contacts tool in your Contacts database. To use it:

1. Check the contact(s) that you want to move or copy to another user's XSite account.

2. Next, click **Tools, Move/Copy Contact(s)** in the toolbar.

3. When the **Move/Copy Contacts** dialog appears, verify that you want to move/copy all of the contacts listed, choose whether you want to **Move** or **Copy** the contacts by marking the appropriate option and then choose the account you want to move/copy them to using the drop-down menu.

4. When you're finished, click **Save** to move/copy your contacts.

Applying Listings

Users of the Agent XSites have an additional feature which can be used to identify property listings that may apply to particular contacts. For instance, if the contact is a home seller, you might assign the property they are selling to them.

To take advantage of these features, you must first access the **Contacts** section of your XSite.

Clicking **Listings** brings up the **Contact Listings** window. To assign listings to your contact:

1. Click the **Unassigned** tab to show all of the property listings associated with any Agent XSite you own. If you're a broker with several XSites, this list shows properties from all of your sites.

2. Use the **Search** field to enter information about the property you need to find, such as the address or MLS number. In addition, you can use the **City** and **State** drop-down lists to narrow your search. Click **Find Now** to filter the list.

3. Click **Clear** to reset the search criteria and show all of your properties.

4. Scroll through the list and click the property you want to assign. From the drop-down list located in the **Contact Type** column, select the item that best describes how this contact relates to this property. For example, if they're selling the property, select **Seller** from the list. Click **Assign** to apply this property to your contact.

Repeat these steps to assign as many properties to this contact as desired. When you're done, click **Close**.


Contacts

Tools

Contacts come equipped with a variety of different tools to help you manage your contacts. From creating groups or labels to importing and exporting contacts from other contact management programs, all of these features are available in the **Tools** menu of your Contacts database. One thing to keep in mind as you use these tools as that your tools list varies based on the contacts you're viewing. When you change your contact view, new tools may become available. For more information about switching contact views see the Viewing your contacts section of this manual.

Importing Contacts

Importing your contacts from your existing contact manager or e-mail program saves you time from typing these into Contacts manually. Most people should probably only need to run the import one time when they initially get started with their Contacts database.

1. While in Contacts, click **Tools.** Then select **Import / Export**.
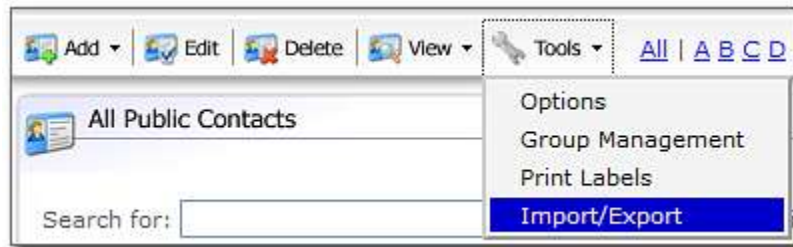
2. The first time you run the **Import/Export** feature, you're presented with the option to install the **Import/Export** control from a la mode. Since this function accesses information on your local system, you must install this control before you continue.

 Note: From time to time, we add features to the **Import/Export** function. When we do, you may be prompted to reinstall it. Simply click **Install** to proceed. Should you experience any difficulties installing the

Import/Export control, you can manually install it using a link in the **Help** section below the **Import/Export** pane.

3. Once the control installs, the **Import/Export** window should appear. The **Method** and **Type** should already be set to **Import** and **Contact**. Click the drop-down menu and choose the program from which you are importing. Depending on the program you choose, different instructions appear in the "Help" part of the screen to assist you with specifics.

 Note: If you're using Microsoft Outlook 2003, you may be warned that a program is trying to access your e-mail addresses. This is, of course, what the import function is doing. To continue, click the **Allow access for** check box, then select 10 minutes from the drop-down menu and click **Yes**.

4. The application accesses your existing contact data and displays the possible entries on the right side of the screen. As it imports the contact data, it checks the imported contacts against the current set of contacts in your database. If it suspects that one of the contacts you are trying to import is a duplicate it flags it with the icon indicates that the contact may be a duplicate. The icon indicates a new contact.

5. XSites allow you to assign any of your contacts to groups. This makes it easier to follow up with all of the contacts that meet certain criteria. When you import contacts, you're given the opportunity to assign them to groups as well. At the top of the screen, click the **Add all contacts to** check box. Now, mark the option to add a **New Group** and type a name for this group into the text box. Alternately, you can click **Existing Group** and then pick a group from the drop-down list.

6. Scroll through the list and mark the entries you wish to copy into your Contacts database. Click **Select All** at the top of the screen to quickly check all of the contacts.

7. Finally, click **Import** to bring the selected names into your Contacts list and, if you chose one, assign them to a specific group.

Contacts

Your contacts are then imported. If you want to import additional contacts, repeat steps 3-7 above. Once you've imported the contacts, you may want to go back and edit each contact, update their information and assign them to additional groups.

Exporting Contacts

As you might suspect, exporting contacts works just the reverse of importing them.

1. After clicking **Import/Export**, mark the **Export** option.

2. Since you're working with Contacts, leave the **Type** as **Contacts** and choose the destination for your contacts from the drop-down list and click **Get Data**.

3. You're then presented with the contacts in your address book on the right side of the screen. Scroll through the list and mark the ones you wish to copy to your 3rd party contact program.

4. Click **Export**. All the items you marked are then copied directly into your other contact manager.

If you use a 3rd party contacts program that is not directly supported by your our contacts module, try using the **Excel** option as your **Destination** format. It is likely that your program includes features to read from this common format.

Group Management

When you enter or edit a contact, you're able to assign that contact to groups. This allows you to direct your future marketing campaigns to a whole group of contacts that meet certain criteria. A contact can be a member of several groups, allowing you to fine-tune your marketing efforts for maximum impact.

 Note: If you'd like to use your XSites contacts and groups to electronically market yourself or your site and you do not already have a program you are satisfied with to help you do so, talk with you're a la mode sales representative about the XSellerate marketing system.

In your **Contact Management** screen, click **Tools**. Then click **Group Management**. Use this feature to add as many groups as you feel necessary. Click **Delete** to remove groups that are no longer applicable.

 Note: Unlike contacts, groups cannot be made public, if you wish to filter your contacts by group using the **Groups** drop-down menu in the **Contacts** view, you first need to switch to the **My Contacts** view as outlined in the Viewing your contacts section of this user manual.

Printing Labels

New to **Contacts** is the ability to print address labels from your online contacts so that you can use them in your mail marketing efforts. If you need to print a series of labels:

1. Open your contacts in and then filter your contact list by last name, Type, or Group to find the contacts for which you want to create labels. Remember, you only need to use the available drop-down menus in the **Contacts** view to take advantage of our filtering features.

 Note: If you want to filter by group, you need to first switch to the **My Contacts** view as outlined in the Viewing your contacts section of

Contacts

this user guide. Since groups, unlike contacts, cannot be made public, if you do not do so, the **Groups** drop-down menu is unavailable.

2. Once you've filtered your contacts to just those for which you wish to print labels, click **Tools, Print Labels**.
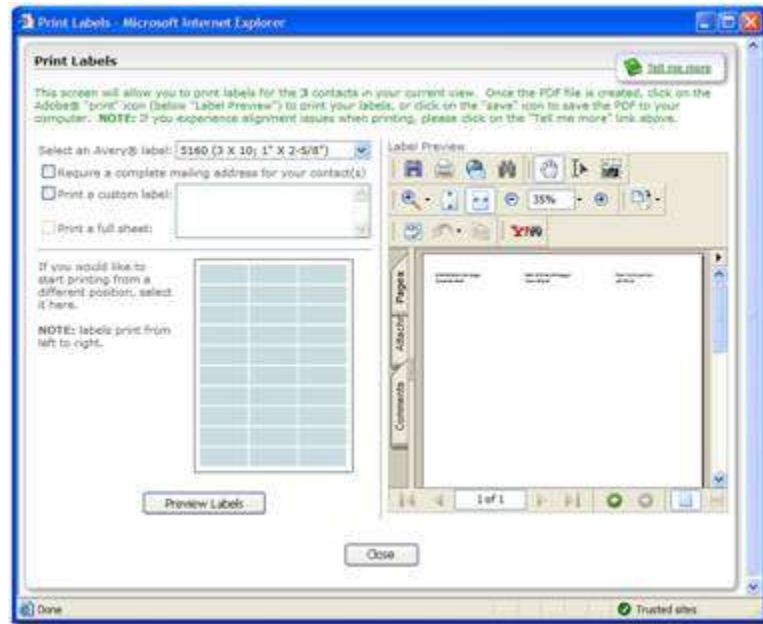
3. In the Print Labels window, you can:
    o   Choose the type of Avery® labels on which you wan to print using the drop-down menu.
    o   Require that the contact contains a full mailing address to print a label for it so that you don't print labels you can't use for mailings.
    o   Print a custom label instead of labels from contacts
    o   Force the label printer to print a full sheet of your custom labels

    o   Choose the starting label on your label sheet by clicking the corresponding cell in the preview page above the **Preview Labels** button.

4. When you're ready to print your labels, just click the **Print** icon in the **Label Preview** pane to send them to the printer.
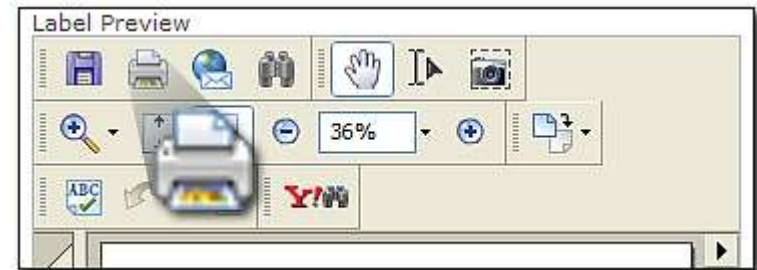
Options

Another selection under the **Tools** menu is **Options**. This feature lets you control several items in the Contacts list display.

*   The first item lets you control how many days a contact is indicated as "New" in your database. Simply select a timeframe from the drop-down menu.

*   The second option lets you control how many contacts are displayed in one screen when you view the database. From the drop-down menu, you can select up to 200 contacts per screen. However, be aware that the more you display, the longer it takes for the application to create the screen.

*   You can choose which phone number appears in the **Phone** column of the Contacts list in the third section. Since only one phone number can be shown at a time, select the number that you're most likely to use for all of your contacts.

*   Finally, you can determine which sections of contact information should appear expanded by default when you view full contact details by checking each of the boxes for the sections you want to expand.

Schedule & Calendar

Remember, when you're finished making your changes, click **Save** to implement them.

Schedule & Calendar

The schedule and calendar in your XSite and CertMail are a part of our online appointment features. Instead of having to use a separate program to track these items, it's all done through your online scheduling tools and ties in with appointment related features in our XSites and desktop applications.

If you're accessing your schedule through your XSite, just click **Scheduling** in **My Office**. Or you can also access your schedule through CertMail as follows.

To access your calendar, click **Schedule** in the top toolbar.

Adding a New Calendar Item

Calendar items can be added automatically as you schedule inspections and appointments in our other applications, but you can also add them manually. First, click the day in your calendar on which the appointment or task is to occur, then click **New** at the top left of the screen.

- The **Completed** option is usually marked when you edit a calendar item, but when adding new calendar items, you could add an event from the past just for tracking purposes.

- **Scheduling** allows you to categorize your calendar items based on being a task, activity, call, meeting or a pending to do item. Currently, all categories have the same functionality, but a future release may enable different capabilities depending on the category.

- Select your start and end times for the event. These are used to trigger reminders. The Web URL is sent with the reminders.

- In addition to specifying how and who's notified and how, an administrator can delegate a task to another user, so it goes on their calendar as if they put it there themselves. When the administrator delegates a task, it is not placed on the administrator calendar.
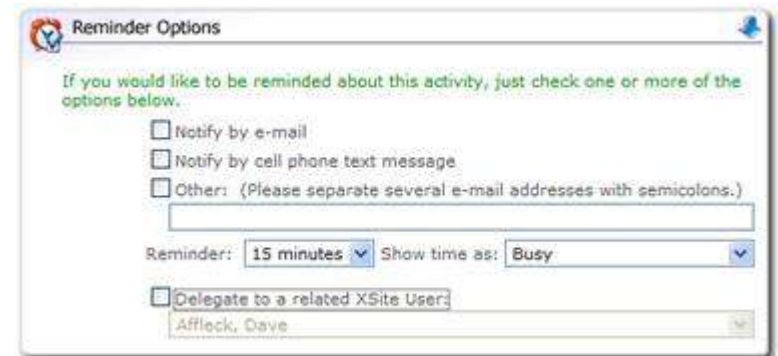
- The **Add Others** area lets you include others when reminders are sent via e-mail. However, they don't "own" the task

Be sure to click **Save** at the top left once you've entered the task's details.

Viewing & Searching Your Schedule

When you initially log into your schedule, you're presented with the month view of your calendar.

- To switch to a daily or weekly view, click the links above the calendar.

- You can switch to the next month (or week or week or day) using the horizontal arrows at the top of the calendar.

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- If you switch to another time frame for your view, the calendar in the left navigation always has links/arrows to move a month at a time.

- On the left side of the screen, you should also see quick links to upcoming reminders and activities as well as a search for activities. By default, these may be collapsed. Just click the arrow in the section header to expand panels.

Importing or Exporting Activities & Tasks

If you've been keeping a schedule in a different application, you can transfer appointments and tasks to and from your online schedule. Here's how to import appointments:

1. While in your schedule, click **Import / Export**.

2. Select the **Import** method and either **Activity** or **Task** for your type.

   In most programs, "Activities" are like appointments with a definite start/stop time and often a way to mark you as busy. "Tasks" are more like a To-Do list with a due date and schedule. XSites scheduling presently handles activities and tasks in the same manner.

3. Click the drop-down menu and choose the program from which you are importing. Depending on the program you choose, different instructions will appear in the "Help" part of the screen to assist you with specifics.

4. Click **Get Data** and the possible entries are first displayed on the right. Mark the ones you wish to copy into your online schedule (or use **Select All**) and then click **Import**.

 Note: If you're using Microsoft Outlook 2003, you may be warned that a program is trying to access your e-mail addresses. This is, of course, what the import function is doing. To continue, click the **Allow access for** check box, then select 10 minutes from the drop-down menu and click **Yes**.

Exporting activities from your online schedule works in reverse of importing.

1. After clicking **Import/Export**, mark the **Export** option.

2. Change the type to **Activity**.

3. You should be presented with the **Activities** in your schedule. Mark the ones you wish to copy to your 3rd party scheduling program.

4. Then, click **Export**. All the items you marked are then copied directly into your other scheduler.

If you use a 3rd party contacts program not directly supported our online scheduling tools, try using the **Excel** option as your **Destination** format. It is likely that your program includes features to read from this common format.

XSellerate

This online guide has been designed to guide you through XSellerate and provide answers to your most common questions. Just click the "book" icons on the left side of the screen to access different chapters of this online guide.

Getting Started with XSellerate

Regular, targeted marketing is essential in building relationships with new prospects and strengthening ties with existing clients. But, how do you find time in your busy schedule to keep in touch? Most of us have enough to do already!

The solution is XSellerate, a tool that automates client communications. You just pick the recipients, decide which messages they should receive, set the timing and off they go!

To access XSellerate from your XSite:

1. Log into your XSite's Admin functions

2. Click the **XSellerate** shortcut at the top of the screen

To access XSellerate for stand-alone users:

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1. Launch the **XSellerate** link you were provided when you signed up.

2. Type your username and password and click **Login**.

When you open XSellerate, the primary main page is segmented into three panes:

My Campaigns

This pane shows all of the campaigns you've created, and their current status. Click on any campaign in the list and you can see, at a glance, you can tell which recipients are getting that campaign, which ads are included in it and whether there were any errors.

Settings

This section of the home page gives you access to set the various options for how XSellerate works. You can also access the help resources available.

Activity/Results

The main portion of the XSellerate home page is devoted to providing you information about what and how your campaigns are doing.

- The **Activity** pane shows which campaign ads are scheduled to ship this week, month or near future.

- The **Results** pane provides information on how XSellerate is performing.

XSellerate Basics

XSellerate utilizes your contacts database in conjunction with individual marketing pieces – called "ads" in XSellerate – to build a series of regular communications, or "Campaigns." Campaigns can be:

- **One Time contacts** – Although not really a "campaign" since it only happens once, you can use XSellerate to send a particular message based on a one time event, such as signing up a new client.

- **Drip, or multi-contact campaigns** – Used to ensure that a series of supporting messages are delivered to your contacts on a regular basis, increasing awareness of your message.

XSellerate campaigns are currently based on messages sent through e-mail as part of an ongoing business relationship. This is very effective as long as you avoid "spamming" techniques. Done right, e-mail marketing is often welcomed by customers. In the future, you will also be able to include printed, hard copy ads in your campaigns.

Here's a simple primer on building your marketing plan to utilize XSellerate.

- Step 1: Planning your Campaigns

- Step 2: Organizing your Campaigns

- Step 3: Creating your Campaigns

- Step 4: Care and Maintenance

Step 1: Planning Your Campaigns

Before you get started using XSellerate, you should spend some time planning your marketing efforts. Effective marketing is not a haphazard affair. It takes careful planning, efficient execution and regular follow-up. The more effort you put into the planning stages, the higher the payoff in new and repeat business.

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Note: If you're new to the whole concept of marketing, or you need a refresher course for the things you learned in your freshman marketing class, take a look at the **Marketing Tips** section of XSellerate (found in the XSellerate drop-down menu). This tool includes several articles and guides designed to give you a hand.

To begin planning your campaigns, first decide what kinds of contacts you want to receive the campaign. The more you can organize your contacts into common groups, the easier it is to work with them. You can send campaigns to individuals, but making them part of a group assists you in selecting multiple contacts at one time.

You can have as many groups as you like, and add contacts to more than one group. For example, a contact might be part of your "New Customers" group, but also be part of "Hot Prospects" and "Old Colleagues."

Also, if you set up groups, you can add new members to the group so they receive the same campaigns that other members of the group received in the past.

Hint: Since XSites can add new contacts to groups on the fly, you can set up a campaign that sends a series of messages to any new contact who signs in from a certain page on your web site.

Next, figure out what message you want to convey to each group, and how often you want to send them. These messages are the ads that get sent. A message can be a one time contact, such as a "Welcome to the Team" e-mail, or it can be a series of contacts that goes out over a period of time, called a "drip campaign." The great thing about campaigns is that you can run them multiple times to different groups of people. In other words, once you create a campaign and send it, you don't have to create it from scratch to do it again.

Once you've outlined these items, you're ready to start working with XSellerate.

- Step 2: Organizing your Campaigns

- Step 3: Creating your Campaigns

- Step 4: Care and Maintenance

- Step 1: Planning your Campaigns

Step 2: Organizing Your Contacts

An integral part of your XSellerate toolkit is the Contacts database. Use this tool to assign your contacts to one or several groups, which can then be targeted by campaigns. This makes it much easier to add and delete individuals from your efforts.

- The Contacts database is accessed by clicking the Contacts icon in the menu bar.

If you need additional assistance with the Contacts database, consult the Contacts portion of this manual.

- Step 3: Creating your Campaigns

- Step 4: Care and Maintenance

- Step 1: Planning your Campaigns

- Step 2: Organizing your Campaigns

Step 3: Creating Your Campaigns

Once your contacts are organized and your messages are planned, you're ready to start creating your campaigns. Before you create the actual campaign, you must first create the ads that you want to use. Of course, XSellerate includes a collection of ads that can be edited and modified for use in your campaigns. See the Ad Library section of this manual for more on these ads. Chances are, however, that you'll want to create your own ads as well.

Once the ads are created, it's time to start building the actual campaigns. Creating a campaign is a simple three step process:

1. Select the recipients or groups

2. Enter the ads that make up the campaign, and designate when they should be sent

3. Activate the campaign.

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- Step 4: Care and Maintenance

- Step 1: Planning your Campaigns

- Step 2: Organizing your Campaigns

- Step 3: Creating your Campaigns

Step 4: Care & Maintenance

Once you've created your campaigns, the work is not over. You need to ensure that your campaigns are kept up to date. You may need to reuse an old campaign, update the ads that are included, change the groups that receive the campaign or even add new campaigns as your marketing strategy changes. XSellerate makes it easy to keep up with your marketing efforts to ensure you're getting the most bang for your buck.

Ad Library

At the heart of XSellerate are the individual pieces you send out - called ads. Even though these may not be solicitations for business or announcing a promotion, they're called ads because most people can identify with marketing pieces being referred to as ads. Think of these like e-mail templates you keep in a library and then call upon them when needed.

XSellerate comes pre-loaded with hundreds of ads ready for you to send out. You can edit these to meet your needs, or create your own ads from scratch. The Ad Library gives you quick access to all of these ads

To view the ads, click the **Ad Library** link in the XSellerate drop-down menu. All of the ads are listed in the scrolling window in alphabetical order, with a small thumbnail image.
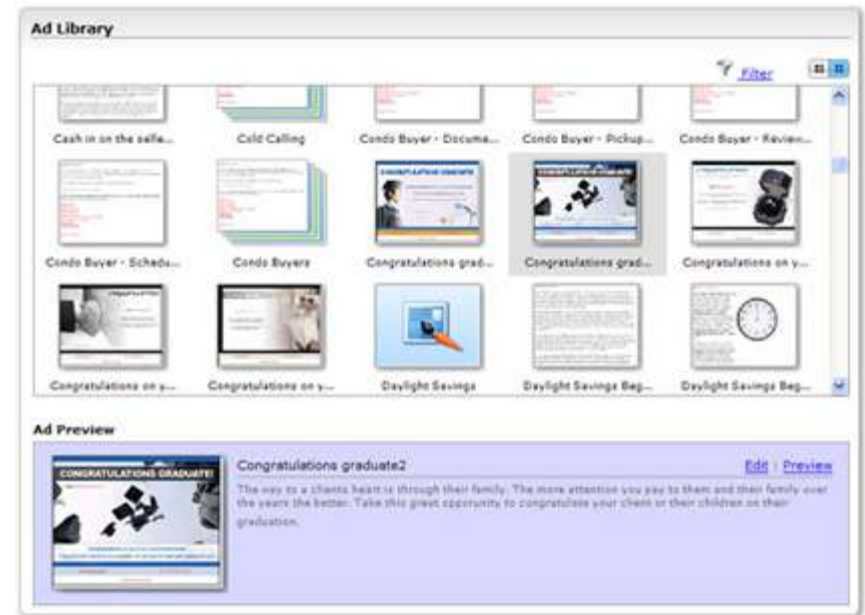
- As you click on each ad, a more detailed description is displayed in the **Ad Preview** pane at the bottom of the screen.

- Click the **Filter** link to open the Show Content dialog box. From here you can select one or more filters to limit the items displayed in the Ad Library. For example, you may only want to view those ads appropriate for past clients.

- Toggle between the thumbnail view of the ads and a "description view" by clicking the button found in the upper-right corner of the Ad Library.

- Icons with a "stacked paper" look denote a pre-built, multi-ad campaign. Click the icon and all of the ads contained in that campaign are displayed in the **Ad Preview** pane.

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- Ads you create yourself are shown in the lists with a generic blue icon.

- To get a better look at an ad, click the Preview link found in the **Ad Preview** pane. A separate window opens and shows you how the ad should look in your customer's e-mail. Content which should come from either your XSite or from the customer's contact information is presented in brackets. For example, where you see {#MyCompany#} in the preview, the customer sees the name of your company when they get the message.

Creating & Editing Ads

To create a new ad, you can either edit an existing ad or start a new one from scratch. Whenever you edit one of the pre-built ads that came with XSellerate, a new copy of that ad is created with your changes. The old ad is retained in your library for future use.

- To create a new ad from scratch, click the **New Ad** link.

- To create a new ad based on an existing ad, select it in the library and click the **Edit** link in the **Ad Preview** pane.

Note: Editing and creating an e-mail ad using the built-in Content Editor is a lot like using a word processor. The Content Editor section of this manual contains in-depth information about using this powerful tool.

Here are some tips when using the Ad Editor:

- When you first open an ad in the editor, you're warned about text enclosed in brackets {}. These are special codes that are replaced with text when the ad is sent.

- Use the **Ad Description** field at top of the editor to name your document. Be as descriptive as possible as this will make it easier to select the appropriate ads when you're creating your E-mail Campaigns.

- To learn the function of a particular button, hover your mouse momentarily over it or click the blue help icon in the top toolbar for a full list of descriptions for each button.

- The **Merge Fields** drop-down menu is split into three sections that allow you to add personalized information to your ads. Just find the information you want to add to your ad and click it in the list. The three types of fields available are:

  o **Contact Fields** are those that pull information from your Contacts database when you send the ad. This allows you to customize your communications using your contact's name and other personal information.

  o The **My Fields** list includes information about yourself and your company that is stored in your XSite.

  o **Date Fields** allow you to insert codes that are replaced by the current date whenever the ad is sent out.

Once you've added information from this menu, you'll see the field name denoted in red surrounded by brackets such as {#FirstName#}.

Note: Working with these fields can be tricky. If you select a field that may not have information in it for every contact - the PrimaryAddress2 Contact Field, for instance - you may get odd results on some of your campaigns.

When you're through writing your ad, scroll down and click **Save**.

Notes on E-mail Clients

XSellerate's E-mail Ads are created using standard HTML message formats. However, due to the large number of e-mail clients and the way they each handle HTML messages, some recipients may not see the ad the same way as it is displayed in the preview window. The overwhelming majority of people use an e-mail client that can view these HTML messages as designed, but even these people may configure their e-mail clients to view

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messages in plain text. This may cause your messages to these people to display oddly.

Keep in mind that HTML ads, while more effective than text ads, may also tend to trigger spam filters that your campaign recipients may be using to filter their e-mail.

Print Library

The XSellerate Print Library consists of a series of individual ads designed to be personalized, printed and distributed to a group of contacts using traditional postal services or handed out as flyers. These ads are stored in Adobe's PDF format, so you must use Adobe Acrobat Reader version 5.0 or higher. To edit the content of the ads and save them, you must use Adobe Acrobat 6.0 Standard or Professional edition.

To use a **Print Library** ad:

- Open the Print Library by either clicking **Print Library** in the **Settings** pane of the XSellerate window, or choose **Print Library** from the XSellerate drop-down menu in the main toolbar.

- Toggle between the thumbnail view of the ads and a "description view" by clicking the button found in the upper-right corner of the Ad Library.

- Click the **Find** link to open the search tool. Type any text and click Search to help find a specific ad.

- Click on any ad in the list to select it, or double-click to open the ad in Adobe Acrobat.

- In Adobe Acrobat, enable the Select Text tool from the toolbar. Go through the ad and edit the text to fit your needs. Many of the ads include blocks of text designed to be replaced with your personal contact information. These items appear in brackets ([ ]). Make sure you find these items and replace them with your information.

Note: You must type your personal information into the ad directly. Unlike e-mail ads, print ads do not merge in your personal or client information.

- Once your changes have been made, save a copy of the document to your hard drive. You can now print the document on your local printer or send it out to a professional printer to generate a top-quality document.

Note: Any changes you make are only saved in the PDF file you save on your hard drive. The next time you choose this ad from XSellerate, it will appear with its default information.

- Close Acrobat and return to XSellerate to create and print additional ads.

Hint: Even though you can't send your print ads through XSellerate, you can still use the power of your Contacts database to target specific clients. If you're going to do the mailing yourself, simply load the XSellerate Contacts module by clicking the Contacts link in the toolbar, and use the Labels feature to print your own mailing labels. Or, if you're using a fulfillment house, you can export your contacts to a standard file format and send that to your service provider along with the PDF file.

E-mail Signatures

E-mail signatures are standard blocks of text that are included in all of your ads. While you can add other information to your signature as well, e-mail signatures generally contain your contact information so that you put that information into the hands of the recipient. Using this feature allows you to make changes to your signature block in the future - say if you change employers - without having to go back and edit every ad that may include it. To edit the e-mail signature included in all of your XSellerate ads…

To edit your Signature or Disclaimer text:

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1. Click the **Settings** option in the **Settings** pane on the left side of the **XSellerate** window.

2. Scroll down and click either the **Edit MySignature** or **Edit MyDisclaimer** link.

3. The editing tool that appears is the same as the one used to Create Ads. Make the desired changes to the file and click **Save**.
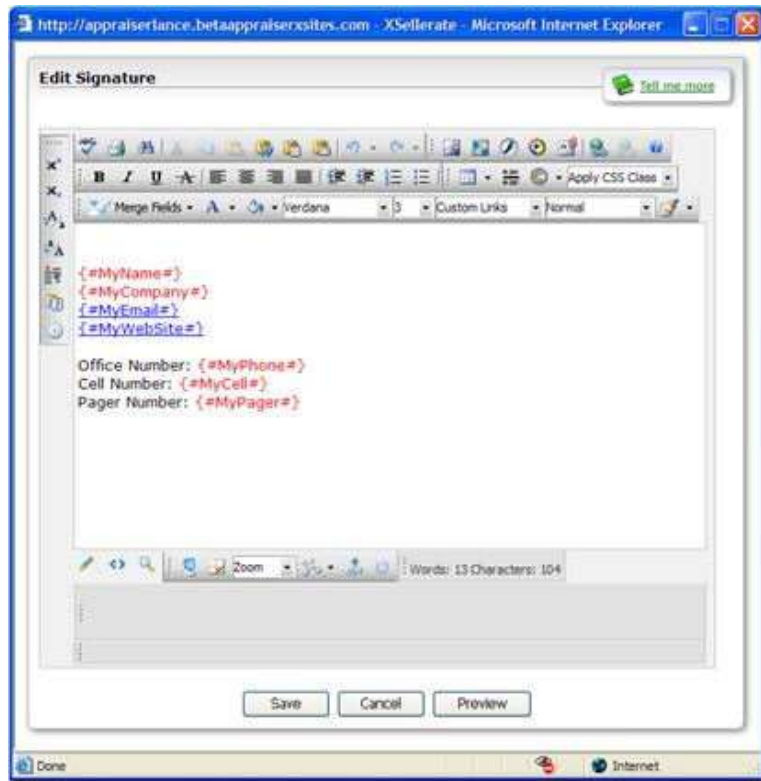
Marketing Tips

XSellerate includes several educational marketing aids designed to help you learn and remember marketing concepts. These materials are specific to your industry and designed to enhance your client communications and

professionalism. They're a great place to get started with your marketing efforts.

- To access them, click the **Marketing Tips** link in the XSellerate drop-down menu.

We are continually adding to the information in the **Marketing Tips** section, so be sure to check back often for new updates.

Marketing Your Listings

Getting exposure for the properties on your XSite is the best way to convert a listing into a sold property. Your XSite helps by formatting your listing in a graphic format with plenty of photos, an image tour, and even online videos. XSellerate goes a step further by allowing you to include any of your listings in automated campaigns. Now you can expose your listings through automated electronic communications to everyone in your contacts database.

To send a listing as a campaign:

1. Log into your XSite's **My Office** page, and click the **Listings** icon in the toolbar.

2. Sort through your listings to find the one you want to use, then click the **Market listing with XSellerate** link for that property.

3. Select the contacts you wish to receive this ad from either the list of **Contacts**, **Groups** or **Contact Types** in your Contacts database.

4. Click **Preview** to take a look at the ad before you send it.

5. Click **Send** to e-mail your listing to the selected contacts.

Building Campaigns

When you launch XSellerate, the **My Campaigns** pane displays all of the campaigns you have currently defined. If this is your first time in XSellerate, your list will be blank.

From here, you can create a new campaign in one of three ways:

- **Use the three-step campaign wizard**

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- **Use Quick Setup**

- **Copy or clone an existing campaign**

Three Steps to Creating a Campaign

To create a new Campaign using the wizard click the **New Campaign** link. Enter the description for this Campaign in the text box and click **Continue**. Make sure you use something descriptive of the purpose of the campaign, and possibly the recipients as well. This makes it easier to manage the campaigns or reuse them in the future.

Now just follow the steps in the wizard:

- **Step 1: Select Recipients**

- **Step 2: Content & Delivery**

- **Step 3: Review & Send**

Step 1: Select Recipients

The first step in the process is to select the contacts that are to receive this campaign.

On the left side is the list of available contacts, broken up by Contact, Groups or Type of Contact. You can display each collection by clicking the header.

 Note: Only those contacts with an e-mail address entered appear in the list.

To include an individual contact or group in your campaign:

- Select a contact or group in the left window, then click the green arrow button.

- Continue adding individuals or groups using this same process.

- If you need to remove a contact from the list, select it in the window on the right and click the red arrow button.

- Notice that as you click on an contact or group, the **Preview** pane at the bottom of the screen gives you some detailed information, and also tells you in which campaigns this person or people are already included.

If you want to add a contact that is not yet in your contacts database, click the **New Contact** button. Type relevant information and click **Save**. This new contact is added to the current campaign, and also added to your contacts database.

Click **Next** when you're ready to move on.

- **Step 2: Content & Delivery**

- **Step 3: Review & Send**

- **Step 1: Select Recipients**

Step 2: Content & Delivery

Now you're ready to start inserting the ads that make up this campaign. At this point, you should already have your ads created, modified and stored in the Ad Library.

To insert an ad into your new campaign:

- Select the desired item from the **Ad Library** list on the left and click the green arrow.

- As you click on each ad, a more detailed description is displayed in the **Ad Preview** pane at the bottom of the screen.

- Click the **Filter** link to open the Show Content dialog box. From here you can select one or more filters to limit the items displayed in the Ad Library. For example, you may only want to view those ads appropriate for past clients.

- Toggle between the thumbnail view of the ads and a "description view" by clicking the button found in the upper-right corner of the list.

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- Icons with a "stacked paper" look denote a pre-built, multi-ad campaign. Click the icon and all of the ads contained in that campaign are displayed in the **Ad Preview** pane.

- Ads you create yourself are shown in the lists with a generic blue icon.

- To get a better look at an ad, click the Preview link found in the **Ad Preview** pane. A separate window opens and shows you how the ad should look in your customer's e-mail. Content which should come from either your XSite or from the customer's contact information is presented in brackets. For example, where you see {#MyCompany#} in the preview, the customer sees the name of your company when they get the message.

Once all of your ads are inserted into the campaign, you need to schedule when you'd like each ad to be sent.

- Click the **Schedule Delivery** link.

At the top of the Schedule Delivery dialog, first choose whether this campaign's ads will be delivered on a specific date, or spaced out on a regular interval.

- Click **By Interval** to set your campaign to deliver ads according to a particular spacing. For each ad, enter a specific interval in the **Wait Days** text box. When you activate the campaign, each ad is sent that many days from the current date. If you'd like the ads to be spaced out evenly, just enter an amount in the **Send ads every # Days** text box and leave the individual **Wait Days** boxes empty.

Note: If a new contact is added to any group associated with this campaign, or if you manually add a new contact to the group, the interval is calculated from the day they are added to the group or campaign.

- Click **By Date** to have your ads delivered on a specific date, regardless of when the campaign is activated or a contact is added. This is particularly useful when sending time-sensitive items, like holiday greetings. For each ad, enter the day you'd like the ad delivered, or use the calendar tool to select it.

The last task is to edit the subject line that accompanies each e-mail when the campaign is sent. You can edit this by clicking in the **Subject** text field for any ad and typing whatever you prefer.

When you've configured all of the ads for your campaign, click **Save**, then click **Next** to continue.

- **Step 3: Review & Send**
- **Step 1: Select Recipients**
- **Step 2: Content & Delivery**

Step 3: Review & Send

The final step in the process is to review your campaign and activate it. The final screen displays the relevant information about your campaign, including which contacts are included in the mailing, which ads and when they are to be delivered.

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- If you're done working on the campaign for now, but are not ready to activate it, just click the **Finish** button.

- If you're happy with your campaign and are ready to start sending the ads, click **Activate Now**, then click **Finish**.

Campaign Quick Setup

Once you become familiar with the campaign setup process, you may choose to bypass the wizard in favor of the Quick Setup process.

- From XSellerate home page, click the **Quick Setup** link.

- Type a name for your campaign.

- Click one or more of the check boxes in the **Identify the target audience** box to filter the ads available for the new campaign. Or you can select one of the pre-built, multi-ad campaigns from the drop-down menu.

- Click the check box for one or more groups that you'd like have receive your campaign.

- Chose whether your ads should be delivered on specific dates, or on a regular interval.

- Click **Continue**.

At this point, you're left in the Campaign Editor, ready to complete your campaign.

Editing & Reusing Campaigns

Once you've created a campaign, you can fine tune it at any time by editing any of the settings you selected earlier. Or, you can create a new campaign by simply copying or "cloning" an existing campaign.

From the XSellerate home page, select any of your campaigns in the **My Campaigns** pane. From the fly-out window:

- Click **Edit** to open the current campaign in the **Campaign Editor**

- Click **Activate** or **Deactivate** link to enable your campaign, or stop it.

- Use the **Add recipient** or **Add element** link to quickly jump to that section of the **Campaign Editor.**

- **Rename this campaign** allows you to modify the name of your effort.

- Click **Clone this campaign** to make an exact copy of the current campaign and open it in the **Campaign Editor**. Follow the wizard to modify the old campaign and create a new one.