



ViewMyListing.com User Training Guide

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ViewMyListing.com and Pro Gold XP

ViewMyListing.com is an advanced web based application, developed by Taro Systems, Inc., that seamlessly integrates with Pro Gold XP, a complete front and back office real estate management software system. Pro Gold XP is installed in your real estate office and provides critical data to your ViewMyListing.com account. Data includes but not limited to: Company assigned prospects, your listing data, individual office invoices with payment history, scheduled showings on your listings, accumulated activity on your listings, 1099 info and transactional data.



Property and transaction information is entered into Pro Gold XP by the office staff and it is sent to ViewMyListing.com by means of a synchronization (Sync) process. The Sync sends information such as listing details, production data, property activity, and prospect assignments from Pro Gold XP to ViewMyListing.com and also updates Pro Gold XP with any new information from ViewMyListing.com

This Sync process can take place at different times throughout the day. Generally, an office will automatically synchronize Pro Gold XP with ViewMyListing.com first thing in the morning when they first open Pro Gold XP. A Sync can also occur when new information is entered into Pro Gold XP, so that it can be immediately viewed in ViewMyListing.com. In this way, the company can enter information into their system and make it readily available to the agent.

When ViewMyListing.com is implemented into an office, a ViewMyListing.com Administrator is assigned. This Administrator is a company employee that has been trained in ViewMyListing.com by Taro Systems, Inc. They are given special training and tools to enable them to handle questions from associates on ViewMyListing.com.

By allowing the company software and the agent interface to communicate, the flow of communication between the company, associate and the seller is dramatically enhanced. Certain information, such as advertising events, property inquiries, and showing appointments are now able to be passed along to the seller directly from the company software and the associate has the ability to add their own items for the seller to view as well.

ViewMyListing.com teamed with Pro Gold XP is one of the best communication tools available for real estate offices, agents, and sellers. It has a suite of agent tools that can be used to manage contacts, listings, showings, and personal appointments.



Welcome to ViewMyListing.com

ViewMyListing.com can alleviate the seller's greatest complaint, communication. Sellers want timely up to date information on the sale of their home. In the past, this flow of meaningful information between the company, associate, and seller has relied upon manual compilation of seller progress reports that have often lacked substance and value. Often, this process has been instigated by the seller wishing to know what is being done to sell their property. This lack of proactive communication in a timely manner can result in customer dissatisfaction.

Communication is the key to dramatically improving the following key issues:

1) Reduce Expired Listings

Consistent communication to sellers will allow for earlier price reductions. Without **ViewMyListing.com** the only one to get the price reduction is the next company they list with.

2) Shorten the Listing Time on the Market

Anyone in real estate knows that a house that is priced right will sell regardless of market conditions. **With** the advanced seller communication feature of **ViewMyListing.com**, all documented activity will make sellers more receptive to earlier price reductions.

3) Communication Will Set You Apart From Your Competition

Increase your property listing inventory with the competitive advantage of outstanding seller communication provided by **ViewMyListing.com**, an online service only available to those companies that have the **Pro Gold XP** system.

ViewMyListing.com Features include:

- Online Seller Progress Reporting
- Appointment Tracking System
- Comprehensive CRM Capabilities
- Text Messaging Capabilities
- Auto Contact Email Reminders
- Agent/Company Calendar
- Auto Showing Surveys/Feedback
- Auto Email Appointment Reminders
- Auto Listing Expiring Alert Emails
- Online Agent Contact Management
- Online Listing Activity Management
- Auto Email Marketing Campaign
- Auto Seller Email Activity Reminders
- Auto Listing Price Evaluation Emails
- Lead Tickler / Reminder Functions
- 24 hours, 7 days a Week Online Access
- Integrates to Your Company's Website
- Integrates to Back Office Agent Invoicing System

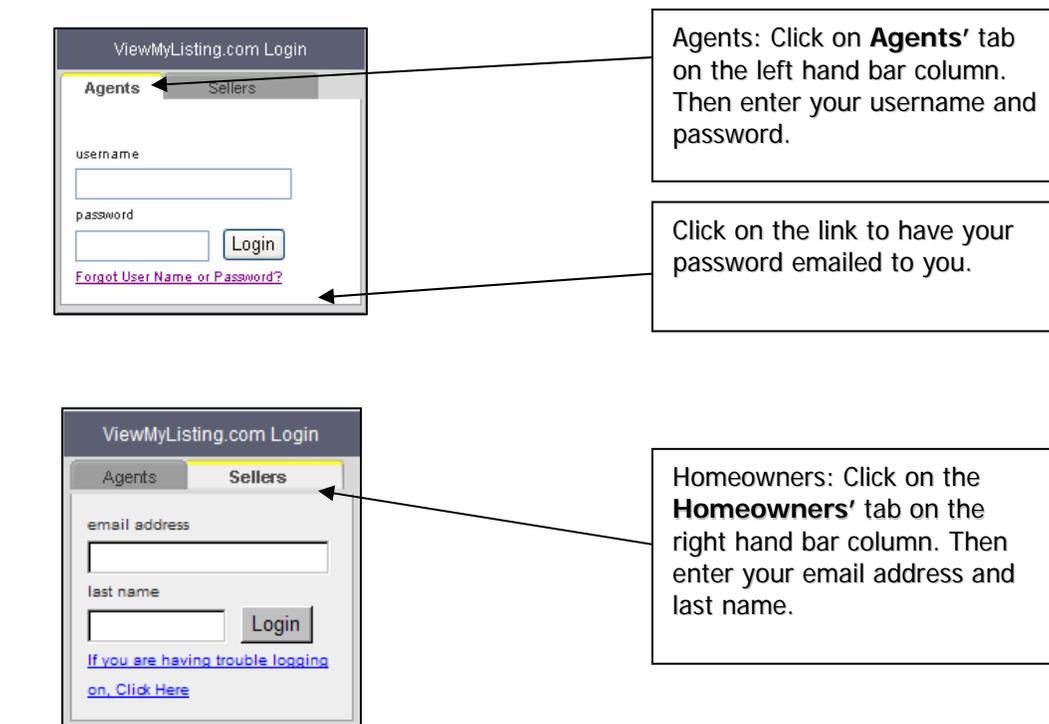
Login to ViewMyListing.com

There are three methods for accessing your ViewMyListing.com account.

1. Go to the URL www.viewmylisting.com and locate the login screen (see ref. 1a).
2. Click the ViewMyListing.com logo (see ref 1b) on your brokerage web site and locate the login screen (see ref. 1a).
3. By auto login from an automated email

Titles of Example Emails

- i. Initial Welcome Email
- ii. New Contact Email
- iii. Significant Activity Email
- iv. Showing Feedback Survey Received
- v. Company Events
- vi. Reminders
- vii. New Listing Notification



Ref 1a: ViewMyListing.com Login



Ref 1b: ViewMyListing.com Logo

* Adobe Reader (PDF format) is used throughout ViewMylisting.com. [Click here](http://www.adobe.com/products/acrobat/readstep2.html), or visit <http://www.adobe.com/products/acrobat/readstep2.html>, to download free Adobe Reader software.

Properties Tab

The **Properties tab** allows agents to view the details of their transactions, search company listings, schedule showings and maintain the seller progress reports.

- **Profile tab** provides the transaction details in read-only format.
- **Activity tab** displays the events that have taken place on the property.
- **Showings tab** is a list of all showings that have been scheduled.

Transaction information in the **Property Profile** box is read-only and any changes need to be made within the brokerage office's Pro Gold XP software system.

Use the **Search Criteria** drop down menu to search by any of the following:

The screenshot shows a 'Search Criteria' dropdown menu with the following options: Listed, My Listings by MLS No., and Enter MLS Number. A 'GO' button is next to the input field. Callouts provide details for each option:

- Listed:** Listed, Active Properties, Expired, Expiring in 30 days, Pending, Closed, Closed this month, Closed last month, Closed this year, Closed last year.
- My Listings by MLS No.:** My Listings by MLS number, My Listings by Address, My Listings by Seller, Company Listings by Address, Company Listings by Seller, Company Listings by MLS.

❖ Clicking on an address will display the summary of the property.

The screenshot shows the software interface with the following callouts:

- Print a copy of the property's activity list:** Points to the 'Print Progress Report' icon.
- Print a list of your production details on closed transactions as well as to current listings and pendings:** Points to the 'Print Transaction Report' icon.
- Profile Tab displays a transaction snapshot:** Points to the 'Profile' tab in the 'Summary of Activity' section.
- View the property details on the selected property:** Points to the 'Property Profile for: Wayne Baxter - 2343 Main St' section.

The 'Property Profile' section contains the following data:

MLS No.	4530786	List Date	5/1/2006	First Name	Wayne
Address	2343 Main St	Exp Date	11/1/2006	Last Name	Baxter
City	Anytown	Status	Listed	Email	baxter@internet.com
State	NY	Sq. Foot	2850	Notes	Please check with Judy prior to showing Just talked to stan about the back yard. Beware of dog!
Zip	54644	Beds	3		
Township		Baths	2.50		
County		Garage	None		
Price	150,000.00	Lot Size	2266		
		Rooms	8		

Properties Tab – Activity and Seller Progress Reporting

The **Activity tab** displays each event that has been recorded on the property for online listing management. This information is the same list of activities that make up the seller progress report and also the list that a seller would see when they login to their account.

By clicking on an event the details will display in the **Activity Detail** box at the bottom of the screen.

Click to display the Activity list.

Change the order of the activities by using the yellow hyphens.

View and edit the activity detail. Sellers will be able to view the Date, Event, Event Desc., and Notes fields.

Summary of Activity for: Wayne Baxter - 2343 Main St

Profile	Activity	Showings		
Date	Time	Event	Event Desc	Appt Date
12/16/2006	8:00 Am	Sent	Feedback Request	
12/13/2006	8:00 Am	Sent	Feedback Request	
12/12/2006	1:21 Pm	Event	Open House	
12/12/2006	10:20 Am	Other	Open House	
12/12/2006	10:19 Am	Event	Open House	
12/12/2006	8:00 Am	Sent	Feedback Request	
12/10/2006	8:00 Am	Sent	Feedback Request	
12/6/2006	12:05 Pm	Sent	Email	
12/5/2006	11:05 Pm	Appointment	None	
12/5/2006	8:00 Am	Sent	Feedback Request	
12/2/2006	8:00 Am	Sent	Feedback Request	
12/1/2006	11:00 Pm	Appointment	Preview	
10/29/2006	8:00 Am	Sent	Feedback Request	

Activity Detail for: Wayne Baxter - 2343 Main St

Save Cancel New Delete

Date: 12/16/2006 Time: 8:00 AM
 Event: Sent Event Desc: Feedback Request
 Appt Date: Appt Time: To Time:
 Appt Type: (Empty) Appt Status: UnConfirmed

❖ **Adding or Deleting Events** to the sellers' progress report can only be done when the **Activity Tab** is clicked. Use the icons in the **Activity Detail** to add, modify or delete events.

Showing Detail for: Wayne Baxter - 2343 Main St

Save Cancel New Delete

Click to create a new event that will be added to the seller progress report.

❖ **Activities can include events added by the agent, company, co-op agent feedback or consumers. Example activities include:**

- Advertisements
- Open houses
- Showings
- Showing feedback and attempts
- Appointments
- Mailings
- Web visits

Properties Tab - Showings

The **Showings tab** displays a list of all showings that are scheduled on the selected property. Showings may be entered by your office through their Pro Gold system, or here in ViewMyListing.com. Utilizing this showings appointment system prevents appointment conflicts and the automatic feedback systems provide critical information on the result of the showing appointment.

When a showing is selected, the details will appear below in the **Showing Detail** box.

Summary of Showings for: Brenda Hill - 611 Banard Ct.

Profile	Activity	Showings	Agent
Date	Time	Status	Agent
12/9/2006	12:00 Pm		My Agent (222) 222-2222
12/1/2006	12:00 Pm		Sally Renolds (324) 532-3353 Centu

Showing Detail for: Brenda Hill - 611 Banard Ct.

Appt. Date: 12/9/2006
 Appt. Type: Showing
 Showing Co.: My Co.
 Agent Email: kgrear@taronetwco.
 Notes: ghdfghdfghdf

Appt. Time: 12:00 PM
 Appt. Status: (Empty)
 Showing Agent: My Agent
 Primary Phone: (222) 222-2222
 Co. Phone: (222) 222-2222
 Cell Phone: (444) 444-4444

Use the icons to create a New Showing, Edit or Cancel a showing

Yellow hyphens represent alternative sorting options of the showing list.

Click to display a list of all showings on the property

New Showing

Enter the date, time, appt status and showing agent's information and click on save.

Showing Detail for: Wayne Baxter - 2343 Main St

Appt. Date: [Calendar: December 2006, 12/9/2006 selected]
 Appt. Type: Showing
 Showing Co.:
 Agent Email:
 Notes:

Appt. Time: [Clock: 10:00 selected]
 Appt. Status:
 Showing Agent:
 Primary Phone:
 Co. Phone:
 Cell Phone:

- ❖ It is very important to record the showing agent's email address. ViewMyListing.com will send up to three requests to the showing agent for feedback. Any feedback will automatically forward to the Seller Progress Report and be available in real time when the survey is completed.

Contacts Tab

The **Contacts tab** displays contact profiles, call activity and marketing events. It enables contact relationship management with the tickler/reminder functions, appointment tracker, inbound and outbound call record, and ability for letter and email marketing.

- **Activity tab** provides a record of the entire call history, appointments and marketing events that have taken place with this particular contact.
- **Reminders tab** includes a list of all scheduled and upcoming reminders.
- **Marketing tab** presents a record of marketing events that have or are scheduled to take place.

Use the **Search Criteria** drop down menu to search for a specific contact or organize contacts by priority, date of contact and call back status.

The screenshot shows the 'Search Criteria' window. At the top, there is a dropdown menu set to 'Contacts' and an 'All' button. Below this is a section titled 'My Contacts by Name' with an 'Enter Name' field and a 'GO' button. A table lists contacts with columns for 'Last Name', 'First Name', and a letter range. The contacts listed are: Anderson Keith (E-G), Andrews Susan (H-J), Astaire Fred (K-L), Baxter Wayne (M-N), Brown Virginia (O-P), Burr Vicki (Q-R), Butler Suzanne (S-T), Cavillx Jillx (U-W), Gabel Clark (X-Z), Johnson Unspecified, and Jones Carrie. A 'Page 1 of 2' indicator is at the bottom.

Use the dropdown to search for specific contacts by name, phone or email address.

Select different categories of contacts based on:

- Contacts
- New Contacts
- New Contacts (Today)
- Contacts to call
- Inactive contacts
- High priority contacts
- Medium priority contacts
- Low priority contacts

- ❖ Clicking on a contact will display a snapshot of details in the **Summary Box** and the contact's profile in the area below.

The screenshot shows two overlapping windows. The top window is 'Summary of Marketing for: Fred Astaire - 12'. It has tabs for 'Profile', 'Activity', 'Reminders', and 'Marketing'. The 'Profile' tab is active, showing: Activity Events: 25, Reminders Events: 5 (Next Reminder: 1/12/2007 Call Wayne), Marketing Letters: 6 (Next Letter: 1/17/2007 Potential Buyer), and 'Last 5 Property Inquiries' with the address 1070 Pheasant Ridge Road.

The bottom window is 'Contact Detail for: Wayne Baxter - 50129 Hill Road'. It has 'Save', 'Cancel', and 'New' buttons. The form fields are: First Name: Wayne, Last Name: Baxter, Address: 50129 Hill Road. On the right, there are dropdowns for Status (Active), Type (Buyer), Qualify (Yes), Price Low (\$0.00), Price High (\$0.00), Bedrooms (3), and City (Ada).

View contact information and profile details.

The tab presents a summary of the communication events for the selected contact.

Contacts Tab - Add a New Contact

New Contacts can be added from your brokerage from their Pro Gold XP software system or you may create a personal contact by selected the **New** button highlighted below. A Contact Import Wizard is also available to add multiple contacts at one time.

YML Online Seller Progress Reporting
www.viewmylisting.com

HELP Properties Contacts Invoices Calendar Settings Marketing Log Off

Note: Please enter the following criteria to continue From Date: To Date:

Search Criteria

Contacts [v] All

My Contacts by Name [v] A-B

Enter Name [] GO C-D

Last Name	First Name
Anderson	Keith
Andrews	Susan
Astaire	Fred
Baxter	Wayne
Brown	Virginia
Burr	Vicki
Butler	Suzanne
Cavillx	Jillx
Cleveland	Steve
Gabel	Clark
Johnson	Fred

Page 1 of 2

Summary Box

Contact Detail

Save Cancel **New** Delete

Print Contact Detail

Print Contact Summary

Contact Import Wizard

Add a **New Contact** into the Contact Manager.

Import many contacts into ViewMyListing.com at one time.

Enter in the new contact with as much information as possible; especially the email address if marketing is to be used. If the contact is a potential buyer, details on the contacts property interests can also be included.

Contact Detail

Save Cancel

First Name []

Last Name []

Address []

Address []

City/State/Zip [] [] []

Email []

Phone [] Home [v]

Alt Phone [] Home [v]

Originated []

Next Contact []

Last Contact []

Status [Active v] Type [Buyer v]

Qualify [Unknown v] Quality Amt. []

Price Low [\$0.00 v] Price High [\$0.00 v]

Bedrooms []

Baths []

Sq Foot []

Garage []

Priority [High v]

Notes []

Area []

County []

Time Frame [1 Month v]

Enter a follow-up date for the "Contacts to Call" tickler search.

New contact information and profile details.

Contacts tab – Import Wizard

The **Contact Import Wizard** allows multiple contacts to be brought into ViewMyListing.com from an outside file. For the contacts to be imported, they must be saved in a CSV (Comma Separated Value), Tab or Bar format, typically done through the export function of the outside program.

Select the correct format for the import file.

Browse to locate the saved file of contacts to import.

After selecting a file, the wizard will allow you determine what fields will be brought in. Match the fields brought in by the import to the fields in ViewMYListing.com by selecting the appropriate import field from the drop down for each ViewMyListing.com field.

The dropdown allows imported information to be placed in the correct location.

Selecting a field will show below what information the imported column contains.

Contacts tab – Import Wizard

The import information includes details for call history with the contact. An Activity Date, Source of Call, and Call Notes can all be imported with the contact information if they are a part of the import file.

Activity Date	(Choose) ▾
Source of Call	(Choose) ▾
Call Notes	(Choose) ▾

The checkboxes at the bottom of the screen prevent duplicates by removing contacts with the same phone number or email address. They also allow marketing plans to be automatically enabled to send email marketing letters to contacts.

<input checked="" type="checkbox"/> Don't import contacts where a contact already exists with the same phone number.
<input checked="" type="checkbox"/> Don't import contacts where a contact already exists with the same email.
<input type="checkbox"/> Enable emails to contacts
Enabled Campaigns
Action Plan Buyers

When the fields are mapped, the Contact Import Wizard shows a list of the contacts that were imported. Individual contacts can be edited or deleted before the import is finalized. When Finish is selected, the contacts will be imported into ViewMyListing.com and can be edited

Total Records Proposed: 3 Verify data to be imported, then click Finish to add the Contacts to your VML Account.								
Finish								
		Last Name	First Name	Address 1	Address 2	City	State	Zip
Edit	Delete	Martin	James	3658 111th Avenue		Grand Rapids	MI	49546
Edit	Delete	Page	Angela	6157 28th Street SE		Grand Rapids	MI	49546
Edit	Delete	Smith	Debbie	639 Falls Road		Grand Rapids	MI	49605
Finish								

When the import is complete, ViewMyListing.com will import the contacts and open the **Contacts Tab**. The contacts are saved and can be accessed and edited through the **Contacts Tab**.

Contacts Tab – Activity

The contact **Activity tab** holds a register of the communication with a contact. New calls and appointments can be recorded at the bottom of the screen by selecting the new option. In addition, an existing activity can be edited by selecting the activity and updating the record at the bottom half of the screen.

Click the tab to display the Activity log

Yellow hyphens represent different options for sorting the activity log.

Click on New to display events for the activity history of the prospect

Summary of Activity for: Keith Anderson - 6157 28Th St. Se

Date	Time	Event	Event Desc	Appt Date
12/2/2006	2:20 Am	Vml Marketing	Test	
11/28/2006	1:25 Pm	Installed	Homes Magazine	11/15/2006
11/24/2006	2:20 Am	Vml Marketing	Just Sold	
11/21/2006	2:20 Am	Vml Marketing	Test E-Mail Relocation	
11/19/2006	2:20 Am	Vml Marketing	Test E-Mail Relocation	
11/11/2006	2:20 Am	Vml Marketing	Potential Buyer- Print	
11/10/2006	2:20 Am	Vml Marketing	Just Sold- Email	
10/27/2006	11:27 Am	Outbound Call	Agent Activity	
10/27/2006	11:27 Am	Outbound Call	Agent Activity	

Activity Detail for: Keith Anderson - 6157 28Th St. Se

Save Cancel **New** Delete

Date: 12/2/2006 Time: 2:20 AM
 Event: VML Marketing Event Desc: test
 Appt Date: Appt Time: To Time:
 Appt Type: (Empty) Appt Status: UnConfirmed
 Notes:

Update the details of an existing activity for accurate contact management.

Activity Detail for: Keith Anderson - 6157 28Th St. Se

Save Cancel **New** Delete

Date: 10/27/2006 Time: 11:27 AM
 Event: Outbound Call Event Desc: Agent Activity
 Appt Date: Appt Time: To Time:
 Appt Type: (Select) Appt Status: (Select)
 Notes: Placed call to Keith for appointment reminder

Contacts Tab – Reminders

The contact **Reminders tab** displays a log of reminders that have been scheduled for the contact and allows new reminders to be added.

The screenshot shows the VML software interface. At the top, there is a navigation menu with options: HELP, Properties, Contacts, Invoices, Calendar, Settings, Marketing, and Log Off. The main content area is titled "Burr, Vicki" and shows details for the contact, including the assigned agent (Larry Smith) and various status fields. Below this, there is a "Summary of Reminders for: Vicki Burr" section with a table of reminders. A callout points to the "Reminders" tab in the table header, stating "Click to display the Reminders tab".

Profile	Activity	Reminders	Marketing
Date	Time	Event	Alarm
12/16/2006	1:00 Pm	Call Brian	1:00 Pm
12/14/2006	1:00 Pm	Call	1:10 Pm

Below the summary table, there is a "Reminder Detail for: Vicki Burr" section with a form to create a new reminder. A callout points to the "New" button, stating "Click on New to create a new reminder".

Reminder Detail for: Vicki Burr -

Buttons: Save, Cancel, New, Delete

Fields:

- Date: 12/16/2006
- Time: 1:00 PM
- Event: call brian
- Alarm Time: 1:00 PM
- Alarm: On
- Alarm Email: plee@taronetwork.com

Reminders are part of contact relationship management. When a reminder is added, the information is automatically posted to the calendar and additional notifications can be scheduled. The alarm allows an email, text message, or both to be sent.

The screenshot shows the "Reminder Detail for: Keith Anderson - 6157 28Th St. Se" form. It includes buttons for Save, Cancel, New, and Delete. The form fields are:

- Date: 1/5/2007
- Time: 2:00 PM
- Event: Follow up Call
- Alarm Time: 1:30 PM
- Alarm: On
- Alarm Email: plee@taronetwork.com
- Notes: Try to set an appt.

A callout points to the "Alarm Time" field, stating "The Alarm can be set prior to the appointment time for advance notification."

Contacts Tab - Marketing

The contact **Marketing tab** portrays a log of marketing activity per contact that has already been sent out or is scheduled to be sent. Marketing history will be automatically populated from automated email marketing campaigns or entered manually.

Click to display the Marketing tab

Use the icons to schedule a marketing letter/e-mail, delete or modify send dates for scheduled letters or emails.

View a letter that has been scheduled or already sent.

Marketing Detail for: Keith Anderson - 6157 28Th St. Se

Letter	Scheduled Date	Date Sent	
Potential Listing	12/21/2006		Preview
Test E-Mail Relocation	11/20/2006	11/21/2006	Preview
Test E-Mail Relocation	11/18/2006	11/19/2006	Preview

Marketing letters and campaigns (marketing plan) can be assigned to contacts from the contacts marketing tab. The new icon will allow either a letter or campaign to be selected, along with the date for the event to begin. Letters and Campaigns are set up and managed through the main Marketing tab.

Marketing Detail for: Keith Anderson - 6157 28Th St. Se

Save
 Cancel

Scheduled Date:

Letter:

OR

Campaign:

Select one of the two options.

* For a contact to be eligible for email letters and campaigns, an email address is required.

Additional Features

- ❖ **Hyperlink:** The hyperlink opens a new email from your default email provider that is already addressed to the contact.

www.ViewMyListing.com

HELP Properties Contacts Invoices Calendar Settings Marketing Log Off

Print Contact Detail

Anderson, Keith
 6157 28Th St. Se. Suit 7
 Grand Rapids, MI 49546
 Email: kgrear@tarontwork.com

Assigned Agent: [Larry Smith](#)
 Type: Buyer/Seller
 Status: Active
 Price Low: \$100,000.00

Qualified: No
 Price High: \$150,000.00
 Next Contact:

- ❖ **Reports:** The reports are located in the Properties and Contacts tabs and provide information to help view and manage transactions and contacts. The three reports are:

- Transactions Report (Properties tab)
- Contacts Assigned Report (Contacts Tab)
- Contact Detail Report (Contact Tab)

www.ViewMyListing.com

HELP Properties Contacts Invoices Calendar Settings Marketing Log Off

Print Contact Detail

Andrews, Susan
 233 Maple
 Alto, MI 45343
 Email: stumey@taronetwork.com

Assigned Agent: [Larry Smith](#)
 Type: Buyer
 Status: Active
 Price Low: \$250,000.00

Qualified: Yes
 Price High: \$300,000.00
 Next Contact:

Print Contact Summary

Contacts

My Contacts by Name
 Enter Name GO

Activity Events: 9
 Reminders Events: 4

Transaction Report: Displays production for the past 24 months and current listings/pendings.

Customers First
relocation and referral, inc.

Transaction Report 1/1/2000 through 1/1/3000
 User Name: Lee, Paul

www.viewmylisting.com

Closed											
MLS #	Address	Seller Name	Buyer Name	Sale Price	Sale Date	Close Date	Side	Adj GC	GC	Net	1099
106	9225 Bergy	Rones	Wobbit	\$225,000	12/16/2006	12/16/2006	listing	\$5,062	\$2,000	\$1,000	\$500
102	343 Maple Court	Tones	Frobbit	\$100,000	12/2/2006	12/13/2006	Listing	\$6,000	\$4,000	\$2,000	\$250
102	343 Maple Court	Tones	Frobbit	\$100,000	12/2/2006	12/13/2006	selling	\$3,000	\$2,000	\$1,000	\$250

Pending											
MLS #	Address	Seller Name	Buyer Name	Sale Price	Sale Date	Proj Close Date	Side	Adj GC	GC	Net	1099
	4343 Hill Road			\$112,000	12/11/2006	1/20/2006	Selling	\$3,360		\$1,680	
	885 taro street	milletics				12/30/2006	Listing				

Listed									
MLS #	Address	Seller Name	Seller Email Address	Listing Price	Listing Date	Exp Date	Bedrooms	Bath	
	4654 Ben Franklin Drive	Baines		\$225,000	5/8/2006	6/10/2006	0	0.00	
	3424 Washington Ave.	Jones		\$175,000	5/5/2006	12/5/2006	0	0.00	
	34232 Heathcliff	Lee		\$175,000	9/11/2006		0	0.00	
	23442 Health Road	Henderson		\$100,000	12/5/2006		0	0.00	
	448 taro street			\$100,000			3	2.00	
	23424 Benny Road	Weber		\$100,000	5/2/2006	10/2/2006	0	0.00	

Contact Detail: Provides the information, activity, reminders and marketing for a selected contact.



Contact Detail
Contact: Carrie Jones



Name: Carrie Jones	Status: Active	Type: Buyer
Address: 11312 Hill Road Ada, MI 34434	Qualify: 2	Qual Amt: \$0
	Price \$50,000	Price High: \$100,000
	Low:	
Phone: (345) 345-3453	Bedrooms: 0	City:
Alt Phone: (343) 534-5345	Baths:	Area:
Originated: 11/30/2006	Sq	County:
	Foot:	
Last Contact:	Garage:	Timeframe: 2 Month(s)
Next Contact: 12/1/2006	Priority: 2	CSC Type: Personal

Activity						
Activity Date	Activity Time	Event	Description	Appt Date	Appt Time	Appt Type
12/16/2006	1:15 PM	Appointment	This is a test	12/18/2006	3:00 PM	In-House
12/1/2006	12:00 PM	Event	follow up phone call			

Reminders				
Date	Time	Event	Notes	Email
12/1/2006	12:00 PM	call before going home		
12/1/2006	12:30 PM	call bob		
12/15/2006	9:30 AM	Business Meeting	Business meeting for managers	
12/15/2006	9:45 AM	Managers Sales Meeting	managers sales meeting	

Marketing		
Send Date	Date Sent	Letter Name
12/22/2006		Thank you for Listing- Email
12/23/2006		Thank you Purchased- Print

Contacts Summary Report: Presents a list of contacts for a particular time frame.



Contacts Summary 1/1/2007 through 1/11/2007
Agent: Larry Smith
User Name: gues1



Last	First	Type	Originated	Data Source	Priority	SOC	Next Contact	Phone	Alt Phone	Email	Marketing
Aardvark	Jane	Buyer	1/5/2007	VML - CSC	High	unknown		(616)940-0007		kgrear@taronetwork.com	Yes
Albert, MD	John	Buyer	1/4/2007	VML - CSC	High	unknown				jAlbert@hotmail.com	Yes
Cool	Jack	Buyer	1/2/2007	VAI - Personal	Low	PG		(303)555-2334			Yes
Cool	Wendy	Buyer	1/2/2007	VAI - Personal	Low	Unspecified					Yes
Cool	Benny	Buyer	1/2/2007	VAI - Personal	Low	PG		(616)555-1212	(616)555-8888	woods@charter.com	Yes
Enstine	Albert	Buyer	1/5/2007	VML - Personal	High	unknown		(616)940-0007			Yes
Foo	Benny	Buyer	1/2/2007	VAI - Personal	Low	PG		(616)555-1212	(616)555-8888	woods@charter.com	Yes
Foo	Jack	Buyer	1/2/2007	VAI - Personal	Low	PG		(303)555-2334			Yes
Foo	Wendy	Buyer	1/2/2007	VAI - Personal	Low	Unspecified					Yes
Richard	Mollie	Buyer	1/10/2007	VML - CSC	High	unknown					Yes
Turney	Stacia	Buyer	1/10/2007	VML - CSC	High	unknown				sturney@taronetwork.com	Yes

Information deemed reliable, but not guaranteed.

Invoices Tab

The **Invoices tab** exhibits up to 24 months of stored invoice records. Information displayed on this page is read-only and changes can only be made with the brokerage office in the Pro Gold XP software.

To search for an invoice choose from the drop down menu; All Invoices, Open Invoices or Paid Invoices.

ALL Invoices [v] **Enter Invoice Number** **GO** **Show All**

Selecting a particular invoice presents a list of charges and payments that can simply be viewed on the screen or printed out for record keeping.

Account Balance: \$581.15

Larry Smith
2343 Maple Drive
Anytown, NY 54644
(555) 567-8900

Remit Payment to:
ATTN: Fred Sabberhaggen
Customers First Relocation and Referral, Inc.
6161 Tenth Ave N.E., Suite D101
George, IA 11111

My Invoices

ALL Invoices [v] **Enter Invoice Number** **GO** **Show All**

Invoice Number	Type	Amount	Payments	Balance -	Date ▲	Date Due -	Payment Terms
0505041000	Invoice	\$265.25	(\$20.05)	\$245.20	5/5/2004	10/10/2005	Unspecified
0505041001	Invoice	\$335.95	\$0.00	\$335.95	5/5/2004	Unspecified	Unspecified

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Invoice Detail

Date	Desc	Amount
5/5/2004	01/02/2004 - Placed Ad - Open House - 4543 Maple	\$80.00
5/5/2004	Business Cards	\$52.50
5/5/2004	Color Photos	\$12.00
5/5/2004	Mls Dues	\$75.00
5/5/2004	Yard Sign	\$45.75
5/5/2004	Payment Applied	(\$20.05)

Page 1 of 1

Use the printer icon to print the invoice statement

Change the order of the activities by using the yellow hyphens.

Charges and payments for the selected invoice.

Calendar Tab

The **Calendar tab** is part of the Appointment Tracking System within ViewMyListing.com and allows you to keep informed of daily activities and events.

- **Schedule Tab** displays a list of events, showings, and or reminders scheduled for the day selected.
- **My Events Tab** is a list of events scheduled.

Selecting a day will display personal events, company events, reminders, and showings taking place on that day, whether they have been set by the office in Pro Gold XP or from ViewMyListing.com. The days that have events scheduled are in bold print followed by an asterisk (*) and an automatic reminder will be sent via email and/or text message by 5am EST on the morning of those days.

The screenshot shows the ViewMyListing.com interface. At the top left is the VML logo with the text "Online Seller Progress Reporting" and the website URL "www.ViewMyListing.com". A navigation bar contains links for HELP, Properties, Contacts, Invoices, Calendar, Settings, Marketing, and Log Off. Below this is a user profile for Larry Smith, including his address and phone number. A "Print Schedule" icon is on the left. The main area is divided into a "Search" section with a calendar for December 2006, and a "Summary of Personal Events" section. The "Summary of Personal Events" section has tabs for "Schedule", "My Events", and "Co. Events". The "My Events" tab is active, showing a table with columns for Date, Time, Event, Alarm, Set, and Email. A callout points to the hyphens in the column headers, stating "Yellow hyphens represent options for sorting the event list." Below the table is a "Personal Event Detail" section with buttons for Save, Cancel, New, and Delete. A callout points to the "New" button, stating "Create a New Personal Event". The "Personal Event Detail" section contains fields for Date, Time, Event, Notes, Alarm Time, Alarm, and Alarm Email.

Print a hard copy of the schedule for the selected day.

Yellow hyphens represent options for sorting the event list.

Create a New Personal Event

Personal Event Detail displays expanded information for calendar events and displays icons to add a **New Event**, cancel or make modifications to an existing event.

Settings Tab

The **Settings tab** displays an agent's personal information and default settings, in addition to the set up of a personal website.

The My Settings tab allows changes to information such as password, progress letter frequency and contact settings. Most of this information will already be populated from the Pro Gold software.

Click to display "My Settings"

Choose PDF to open reports with Adobe Reader or HTML to open in another browser window.

"Progress Letter frequency" is a global setting for all listings. This will determine how often your sellers are notified of significant activity

The **Web Settings tab** customizes settings on your personal website through ViewMyListing.com.

Preview your unique website URL.

Alter the color template of the webpage.

Upload pictures and select up to 4 designation logos.

Enter a biography or description to display on your website.

Enter web address to direct a visitor to the website when "Search Our Listings" or "Search Local Listings" is clicked.

Marketing Tab

The **Marketing tab** includes all of the functions for the creation and sending of marketing letters and campaigns in order to effectively remain in contact with potential clients.

Letters can either be sent via email or downloaded into Word with mailing labels for printing and mailing. Either individual contacts or groups of contacts can be selected to receive a letter.

Campaigns are preset collections of marketing letters that can be assigned to individual contacts through the Contacts tab, or set to auto assign themselves to new contacts.

The screenshot displays the 'Send Letters' interface within the VMC Online Seller Progress Reporting system. The navigation menu at the top includes 'HELP', 'Properties', 'Contacts', 'Invoices', 'Calendar', 'Settings', 'Marketing', and 'Log Off'. The 'Send Letters' section is active, showing a search and filter area with dropdowns for 'Select Letter', 'Contact Date', 'Contact Type', 'Select From', 'Status', and 'Source'. A 'Delivery' dropdown is set to 'Email', and a 'Refresh' button is present. Below this is a 'List of Available Contacts' containing names like Aardvark, Jane; Albert, MD, John; Anderson, Keith; Andrews, Susan; Astaire, Fred; Baxter, Wayne; Cavilix, Jillix; Cool, Benny; Foo, Benny; and Turney, Stacia. A 'Total Contacts: 10' indicator and a 'Send Letter(s)' button are also visible. To the right, a 'Contact(s) you have selected' area contains buttons for 'Select', 'Select All', 'Remove', and 'Remove All'. A callout points to the 'Send a Marketing Letter' button on the left, and another callout points to the selection buttons on the right, stating 'Certain contacts or the whole list can be selected.'

How to send a letter:

1. Determine which letter will be sent.
2. Delivery method determines whether the letter will be sent via email or downloaded into Word to be printed. When email is selected, only contacts with an email address will appear.
3. Utilize the criteria to search for contacts by date, type, status, and/or source.
4. Select particular contacts or use the "Select All" to pick the entire list. Only the contacts appearing in the right-hand column will receive the marketing letter.
5. Click "Send Letter(s)" to complete the email or download.

Marketing Tab – Creating Letters

Letters can be added or modified through the **Marketing Tab**. Letters are a “merge style” where fields inserted into the body of the letter will be replaced with specific information when the letter is used.

The screenshot shows the VML Online Seller Progress Reporting interface. The top navigation bar includes HELP, Properties, Contacts, Invoices, Calendar, Settings, Marketing, and Log Off. The main content area is titled "My Web Settings" and contains a "Send Letters" tab. Below the tab are buttons for Save, Cancel, New, and Delete. A table lists letters with columns for Letter, Type, Format, and Recipient. A callout bubble points to the "+ New" button with the text "Create a new letter". Another callout bubble points to the first row of the table with the text "Select a letter to modify or preview."

Letter	Type	Format	Recipient
B1001	Company	Html	Contact
B1002	Company	Html	Contact
B1003	Company	Html	Contact
B1004	Company	Html	Contact
B1005	Company	Html	Contact
B1006	Company	Html	Contact
B1007	Company	Html	Contact
B1008	Company	Html	Contact
B1009	Company	Html	Contact
B1010	Company	Html	Contact
B1011	Company	Html	Contact
B1012	Company	Html	Contact

Page 1 of 2

Create a new letter

1. Enter a **Letter Name**
2. Choose **Text** (all text no pictures) or **HTML** (with pictures and graphics)
Note: HTML letters need to be created in HTML code
3. Choose **Letter Type**:
Personal is only viewable by the agent.
Company is available to all agents (VML admin only).
4. Choose the **Recipient** who will receive the letter; either **Contact only**, **Agent only** or **Both**.

The screenshot shows the form for creating a new letter. It includes fields for Letter Name, Letter Format (Text), Letter Type (Personal), and Recipient (Contact). Below these is a large text area for Letter Text. To the right is a list of agent fields for selection. Callouts explain that the Letter Text field is for typing the body of the email or letter, and that fields from the list can be added to the letter by double-clicking.

Letter Name:

Letter Format: Text

Letter Type: Personal

Recipient: Contact

Letter Text:

- Agent Name
- Agent First Name
- Agent Last Name
- Agent Address One
- Agent Address Two
- Agent City
- Agent State
- Agent Zip
- Agent Phone
- Agent Pager
- Agent Mobile
- Agent Email
- Agent Picture

Marketing Tab – Creating Campaigns

Once marketing letters are set up, they can be organized into plans that will send the letters out at preset intervals. This allows an agent to have marketing letters automatically sent to contacts based on the contact type. Campaigns can either automatically assign to a new contact or be applied from the Contacts tab.

The screenshot shows the 'Send Letters' interface with three callouts:

- Callout 1:** "Select a campaign to view the plan details." points to the 'Campaigns' tab and the table below it.
- Callout 2:** "Choose the letters to be added to the plan by using the drop down menu. Enter the number of days after the contact was added to ViewMyListing.com to direct when the letter will be sent." points to the dropdown menu and input field in the 'Campaign Letters' section.
- Callout 3:** "Name a new campaign and determine the type, auto assign and contact type settings." points to the form fields for creating a new campaign.

The interface includes a navigation menu (HELP, Properties, Contacts, Invoices, Calendar, Settings, Marketing, Log Off) and a header with logos for Vmt and ABC Realty.

Campaign Name	Type	Auto Assign	ContactType	Edit	Delete
Action Plan Buyers	Company	Enabled	Buyer	Edit	Delete
Action Plan Sellers	Company	Enabled	Seller	Edit	Delete
<input type="text"/>	Personal	Enabled	Buyer	Insert	Cancel

Campaign Letters for Action Plan Buyers	# Days Past Origin	Edit	Delete
B1001	1	Edit	Delete
B1002	30	Edit	Delete
B1003	60	Edit	Delete
B1004	90	Edit	Delete
B1005	120	Edit	Delete
B1006	150	Edit	Delete
B1007	180	Edit	Delete
B1008	210	Edit	Delete
<input type="text" value="(Select)"/>	<input type="text"/>	Insert	Cancel

Create a new campaign

1. Enter a campaign name in the box provided and set the following options:
 - **Type:** determines if this plan will be personal or available to the entire company
 - **Auto Assign:** enables the plan to automatically assign itself to new contacts.
 - **Contact Type:** sets the type of contact the plan will automatically assign itself to (if enabled).
2. Click **Insert** to create the new plan.
3. Select which letters will be a part of the campaign and when they will be sent.
 - **# Of Days Past Origin:** the number of days after the contact was entered.
4. Click **Insert** to save the letter in the campaign.

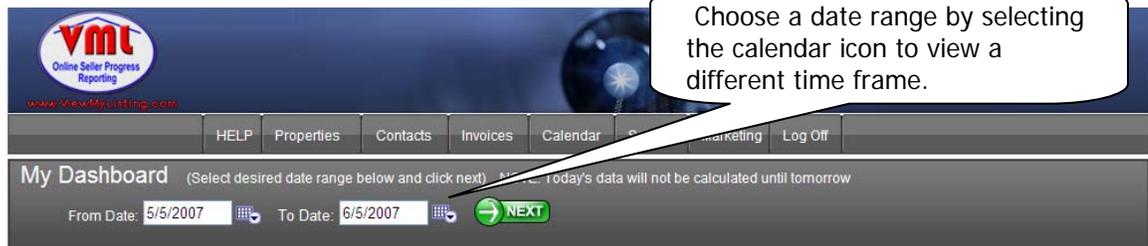
This close-up shows the 'Letter' dropdown menu with '(Select)' selected and the '# Days Past Origin' input field. 'Insert' and 'Cancel' buttons are visible to the right.

Dashboard Tab

The dashboard tab is an administrative privilege designed for managers and office administrators to view comprehensive data captured by the ViewMyListing.com service. This data can be used to monitor agent and seller activity. A warning icon will be displayed in areas that are deficient. Data is available for the previous 365 days.



Click to display the Dashboard.



Choose a date range by selecting the calendar icon to view a different time frame.

My Dashboard (Select desired date range below and click next) NOTE: Today's data will not be calculated until tomorrow

From Date: 5/5/2007 To Date: 6/5/2007 **NEXT**

My Dashboard

📅 = Data effected by above date range
 ⚠️ = Warning: Value does not meet recommended levels

Listings		Total
Total VML active listings		9
Percent with seller email addresses ⚠️		66.6%
Total VML Seller logons for period 📅		0
VML Activity Reminders sent to Sellers 📅		0
Time from listing to pending (Last 365 Day average)		109
Time from pending to close (Last 365 Day average)		42
Listing price (Last 365 Day average)		\$268,555

Showings		Total
Total Showings Scheduled 📅		0
Total showing surveys emailed 📅		0
Total showing surveys completed 📅		0
Percent of returned surveys 📅		0%

CONTACTS	Total	# with Email	% with Email
CSC Contacts (All Sources) 📅	19	9	47.3%
Personal Agent Contacts 📅	0	0	0%

Agent		Total
Total VML active agents		84
Percent with email addresses		98.8%
Total VML Agent logons for period 📅		178
VML text messages delivered to Agent 📅		0
VML emails delivered to Agent 📅		171

Calendar		Total
Total events 📅		124

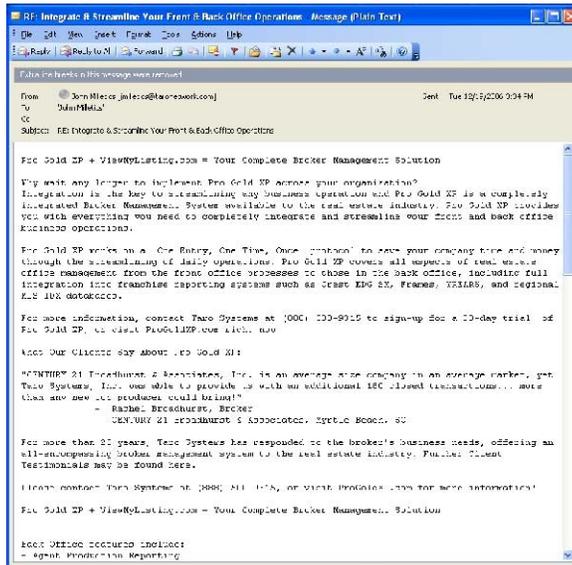
Warning icon on a line indicates the current data is below the recommended value.

Calendar icon indicates the value is thru the date range specified above.

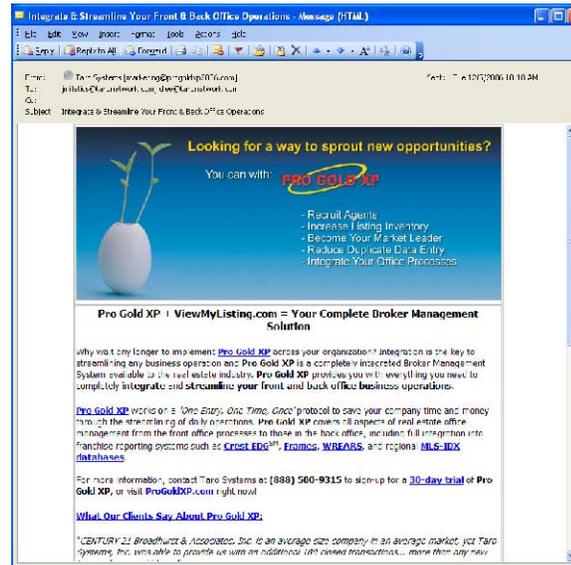
HTML Emails vs. TEXT Emails Reference

Until recently text-based emails were the most common way to send and communicate through email. With the advancement and ease of HTML email you are now able to create emails with pictures, hyperlinks and communicate with more visual graphics. Recently HTML email has become the most popular way to send an email.

Example of a Text email



Example of a HTML email



There are advantages and disadvantages to using both types.

Pros of using HTML Email

- Marketing can be more effective in HTML
- Ability to include pictures, hyperlinks and graphics
- Communicate more effectively by using a visual appeal

Cons of using HTML Email

- Slower to load than a text email
- Higher risk of being filtered or embedded viruses risk
- Takes up more space than text
- Older email clients may not support the HTML email

How to create a HTML Document

- Open the program you wish to create your HTML document (such as MS FrontPage or Dreamweaver) For a free download of a HTML editor try <http://www.evrsoft.com/1stpage2.shtml>
- Create a new page and save it before you get started
- Use a simple layout with a few pictures, this way the email will load faster
- Choose and store your pictures on a web server
- If you use hyperlinks use the full path (use absolute URLs)
- Save the HTML email and pictures to your web server
- Now you are ready to send a HTML email or marketing letter

ViewMyListing.com Automatic Emails

ViewMyListing.com is primarily an online agent – seller – company communication tool and maintains numerous automated processes to keep the seller informed of activity on their property; the agent informed on scheduled appointments and critical property based information; and the company informed on property progress as well.

Automatic Seller Emails:

- Welcome Email
- New "Important Activity" Reports

Automatic Agent Emails:

- New User Email
- New Contact Email
- Co-Op Agent Showing Survey
- Daily Schedule Overview
- Timely Appointment Reminders / Alarms
- Price Evaluation Action Reports
- Pending Listing Expiration Action Reports
- Showing Feedback Survey Reports
- Inventory Pickup (Lock Box / Yard Sign) Reminder Reports
- **Important Text Notifications to Cell Phones & Pagers**

Automatic Company Emails:

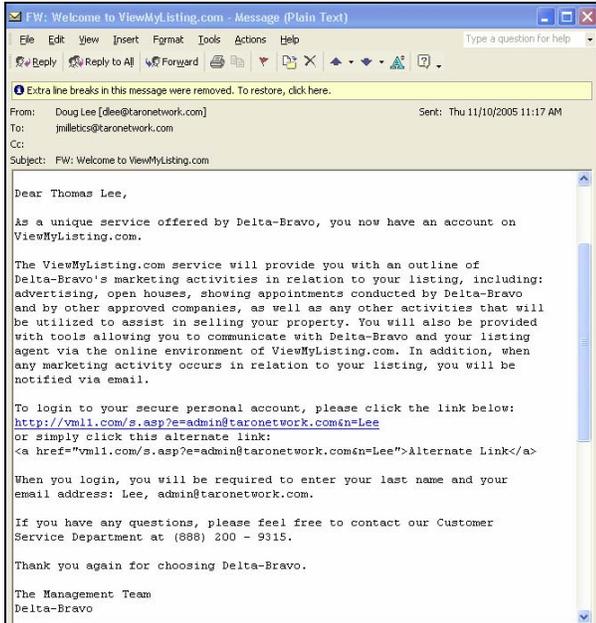
- Daily Summary Report
- Pending Price Evaluations
- Pending Expirations
- Inventory Control

ViewMyListing.com is designed to keep Sellers informed on the sale of their property, while at the same time providing tools and processes needed to manage day to day tasks.

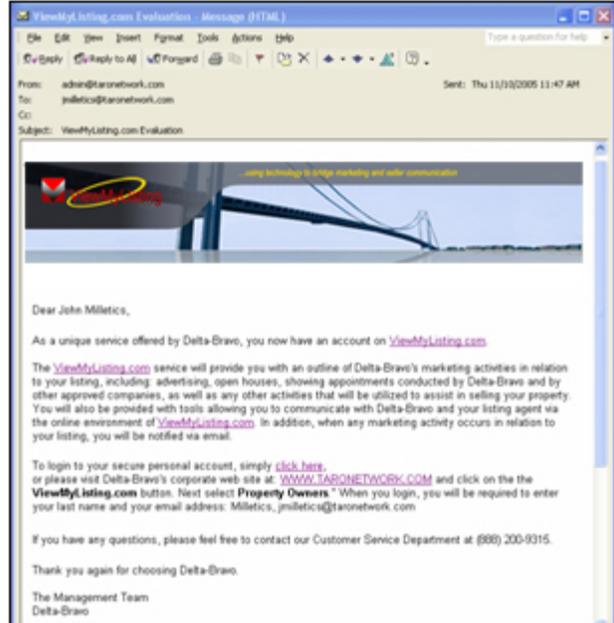
Sample Seller Emails

Welcome Email

Text Based Email

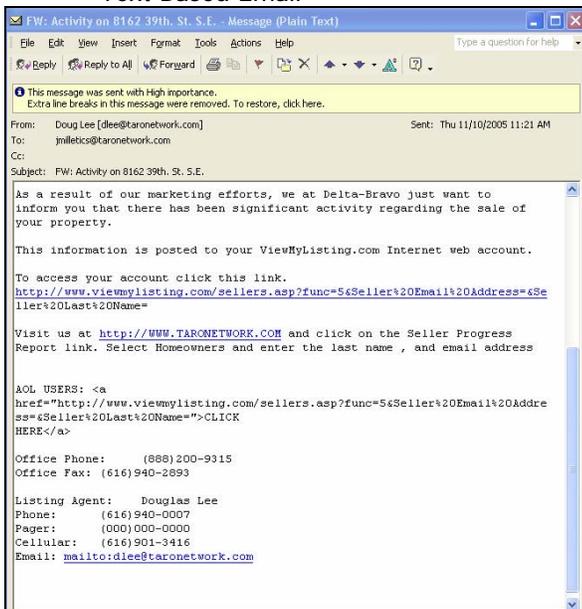


HTML Email



New "Important Activity" Report Email

Text Based Email



HTML Email

