The SmartSite 2.0 website offers a vast amount of marketing tools to enhance your business and includes CMA, SEO, and CRM. This document will guide you through each section of the SmartSite 2.0 Admin Panel.

**AGENT LOG IN**

This log in is for the back end of your SmartSite 2.0 where you can edit and customize your personal agent web site.

You can access your SmartSite 2.0 Admin Portal by logging into your RSA panel, clicking on the Marketing button and then on My SmartSite 2.0.
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MySmartSite 2.0 Public Site

You can view your public facing website from the SmartSite 2.0 Admin Portal > My Website Tab. Click on the Preview Website button at the top right.

The URL generated for your SmartSite (and that will show in the User’s web browser address bar) is lengthy. You may wish to purchase a domain name (i.e. www.JohnDoeAgentRE.com) from a web hosting company, such as GoDaddy, and forward that domain name to your SmartSite. *Work with your web hosting vendor if you do not know how to forward the domain name.*

a) If you choose to “mask” the original domain *(done through your web hosting vendor)* your new domain name will show in the address bar when the User if viewing your site.

b) This will also make it easy for your Clients to go to your site – without having to go to the brokerage website, searching for you in Agents, and then clicking on you’re My Website link.

*SmartSite URL – EXAMPLE – Every SmartSite has a unique URL*
STATIC PAGES

The following pages cannot be edited by an agent. They are written by the brokerage.
- Buyers
  - The Offer
  - Inspection
  - Choosing the Right Home
- Careers
- Resources
- Sellers
  - Why use a realtor to sell
  - Choosing An Agent

EDITABLE PAGES

The following pages have content that is editable by an agent.
- About Me
  - Blog
  - References
- My Listings
  - Neighborhoods
- Resource Pages
  - Buyer/Seller Tips
  - All agent-added pages
The **My Website Tab** allows you to edit your personal information, upload a photo for your site, enter in recent sales, set market trends, and much more!

### MY INFO

### CONTACT INFO

Enter/update your personal information as well as your profile picture. To edit the information, click on the “Edit” link in the upper right-hand corner. To upload your photo, click the “Browse” button, search for your photo, and click Open. Once you have completed the section, Click the “SAVE” button at the bottom of the page.

Changes made here will reflect on your brokerage’s website Agents page also.

*Note: If you have an accent or other special character in your name, you can add this to the panel by cutting & pasting the character from a Word document.*
WEBSITE

If you want to use your own website instead of the one provided to you from HomeSmart, enter your website URL in the Website field and this will redirect traffic to your private site.

SOCIAL MEDIA

Social media icons appear in the header and footer of your website. Icons in the footer are permanently linked to the HomeSmart International social media pages.

Icons in the header will link to social media pages that you enter here. If you do not enter any information here, the icons in the header will also default to International links.

MY BLOG

If you enter a blog address here, a link will appear next to your name on your brokerage’s website Agents tab. If you want your outside blog to appear on your website instead of making new posts on the admin panel, you can subscribe to your blog through the My Website > Pages > Blog > Subscribe tab.

NEIGHBORHOOD

This section shows Neighborhoods that have been created by your brokerage. If you check the checkbox next to any Neighborhood, that Neighborhood will then show as an option when doing Property Searches.
RECENT SALES

The system can automatically pull your recent sales from your MLS and add them to your SmartSite 2.0. Using the Auto button, sales will be pulled for the last year. To add sales manually, choose the Manual button and click Add Recent Sales in the upper right-hand corner to enter in the specific sale information.

HEADER IMAGE

This tab is where you select one or more photos that will rotate through your Home Page. Headers are supplied to the Admin panel from you brokerage. Check the photos you wish to show up and click the APPLY button. You may choose as many headers as you wish. The headers will rotate through your website Home Page.
THEME

You may also select a color scheme for your site. This selection only changes the color of your SmartSite, not the headers. When you select the theme you wish, you will receive a pop-up box that asks if you are sure you would like to change the theme. Click OK.

MARKET TRENDS

Market Trends is information pulled from your MLS regarding the markets that you select. Information that will be available here includes statistics on sold properties, properties for sale in that area, and nearby towns. You may select up to four cities from your local MLS for this function. The system will automatically pull MLS information for the selected area(s). Links to detailed information for these cities will show at the bottom of your Home Page.
If a SmartSite viewer clicks on the View button to the right of any of your shown markets, a dynamic report on that market will populate in a new internet browser tab.
This section is for those agents that wish to use Google Analytics (a separate service provided through www.Google.com/analytics). Google Analytics generates detailed tracking information regarding traffic on your website (i.e. how many people visit per day, which pages they visit, and how they were directed to your site). There is a free basic service as well as a Platinum Version for a fee. All analytics/website traffic information is viewed through Google’s website.

Once you have created a Google Analytics account, they will provide the code to post here.
NOTE: The Buyers and Sellers pages are static and cannot be edited from your Admin Panel. They are controlled by input from your brokerage.

All page editing is done through a Rich Text Editor. This functions much the same as a standard word processing program. In addition, HTML coding can be manipulated for additional formatting. Refer to the RTE section at the end of the manual for more info.

ABOUT ME

Information entered here will show on your Home Page and on your About page. It will also be added (optionally) to any CMA reports that you generate through the Smart CMA tab. To edit, click the Edit Button in the upper right-hand Corner. You can add text, photos, embed videos, and format your page.
The About Me page can be viewed on your SmartSite by selecting the About tab. This page will display the same information as the Welcome section of your Home Page.
BLOG

Your blog will show on your **Home Page** as well as on a sub menu to the **About** tab on your website.

From this section of the admin panel, you can manage/edit/add your blog post(s), name your blog, subscribe to outside blogs, and select which blog(s) you wish to appear on your site.

**NOTE:** *If you do not wish to make blog posts, the blog on your website will automatically default to show your brokerage’s blog content.*
Click Add Post to create your post. Be sure to change the Publish status to “Publish” or the post will not show in your Blog.

All editing is done through a Rich Text Editor. This functions much the same as a standard word processing program. In addition, HTML coding can be manipulated for additional formatting. Refer to the RTE section at the end of the manual for more info.
SUBSCRIBE

If you subscribe to a blog from another source and would like to link it to your website (i.e. the NY Times Real Estate blog), you can enter the RSS Feed URL on the Subscribe screen. You will have the opportunity to select whether this blog shows on your site through the Settings tab.

NOTE: The blog you wish to link to must have an active RSS feed or you will not be able to route it to your website.

SETTINGS

Choose a title for your blog, and then choose which blog you wish to show on your website. Blog titles (links) will show on your Home Page, and full blog entries and subscriptions will show under your About tab.
REFERENCES

References is a sub menu to the About tab on your website. This section could serve as testimonials from clients or from your preferred vendors. To add a reference, simply add the Name, company, and description with a photo and Click SAVE.

Once you have entered two or more references, a Re-Order button will appear at the top of the screen. In the re-order screen you can drag and drop your references into the order you wish them to appear on your site.
View of References on SmartSite

References

John Smith
Working with Smart Agent has been such a pleasure. My wife and I have moved 4 times, each having different agents and John was the most professional and responsive Realtor I have worked with so far. He would return my calls and emails within 30 minutes and made sure we were well taken care of.

Mary Lamb
Smart Agent was our Realtor when we were selling our house. We did not want an open house as scheduled while we were living there as it made me a little nervous. He was very understanding and everytime there was a showing, we would be notified at least a day before to make sure we were ready! I would recommend anyone who is looking for an agent to use Smart!
MY LISTINGS

Your listings will automatically pull from MLS. You can also manually add Pocket Listings and Shared Listings. *Pocket Listings* are listings that you do not wish to put into your MLS. Example: Multi-million dollar home that you are only showing by appointment and do not wish to have drop-by showings. *NOTE:* This may not be legal in your area; please refer to your brokerage if you can have listings that are not shown on MLS.

**Mark as Featured** = Property will show in Featured Properties on your **Home Page**.  
**Mark as Featured on brokersite** = Request that the property be shown on the Featured Properties section of the brokerage website.  
**Open Houses** = Create an Open House schedule for your property.
View of My Listings on SmartSite

View of My Listings on SmartSite

My Listings

Sometimes, to maximize marketing exposure, a property is listed in more than one MLS. That can cause any duplicate listings you see below.

Total: 87

View of My Listings on SmartSite

View of My Listings on SmartSite

Viewer can click on the image or the address to pull up a detail screen for the property

41 W Maricopa Avenue, Phoenix, AZ 85013

$840,900 | 6 Beds | 5.5 Bath | MLS #6087008

Living Status: Active

INCREDIBLE POTENTIAL WITH THIS 8 BEDROOMS & 5 BATH NORTH CENTRAL URBAN ESTATE. MASTER SUITE ON GROUND FLOOR HAS HIS AND HER WALK IN CLOSETS AND BATH AREAS. LARGE KITCHEN AREA IS Ripe FOR A REMODEL AND HAS LOTS OF SPACE. UPSTAIRS HAS 3 BEDROOMS PLUS LOFT. QUITE THE ENTERTAINING BACK YARD-VERY PRIVATE. GATED POOL. HUGE GRASSED LOT AND BUILT IN BBQ. HOME SITS ON A 18,000 SQUARE FOOT LOT.
Click on the Open Houses button to schedule an Open House. Click on Add Open House and enter the required information.
NEIGHBORHOODS

Neighborhoods is a submenu to My Listings on the website and allows you to draw neighborhoods (i.e. area of the city, subdivision, housing development, golf community) in which you specialize. Current MLS listings will show for the drawn map area.

To add a neighborhood, click Add in the upper right-hand corner where you can input the neighborhood information. You must draw a custom neighborhood on the Map.
View of Neighborhoods on SmartSite

South Mountain Village
South Mountain Village in the foothills of the Nation's largest city park. Beautiful views!

Biltmore
The exciting Biltmore neighborhood in the heart of the action. Close to downtown Phoenix and Old Town Scottsdale. Shopping, dining, entertainment all within easy reach.

Property Search

City or Neighborhood or Zip Code: Phoenix, AZ
Bed: Any
Bath: Any
Price: $150 to $350
Property Type: Residential, Rentals
Sort By: Price High To Low

15 Properties Found

Gallery View
Map View
List View

Your search query returned results from multiple MLS data sources. Due to MLS restrictions we are only able to display listings from one MLS source at a time.
To view the other returned search results, click refine search and change the MLS data source.

Nearby Towns
- Scottsdale
- Tempe
- Paradise Valley
- Peoria
- Laveen
- Glendale
- Mesa
- Chandler
- Avondale
**RESOURCE PAGES**

**Resource Pages** are additional page links that you can add to your web site. For example, if you want to market your Mortgage Company (or other preferred vendor), you can add and customize a page to do just that. To add a page, click **Add** in the upper right-hand corner. Pages added here will appear as links under the **Resources** tab.

*All page editing is done through a Rich Text Editor. This functions much the same as a standard word processing program. In addition, HTML coding can be manipulated for additional formatting. Refer to the RTE section at the end of the manual for more info.*
View of Resources Tab on SmartSite

Mortgage Calculator
Buyer/Seller Tips
Resource Pages

Resource Pages

Resource Pages

Enjoy tours and sightseeing activities in Phoenix, Arizona. Phoenix is a premier vacation and travel destination where visitors can experience fan group tours, the Sonoran Desert, outdoor sports such as hiking, mountain biking, rock climbing, and back-packing, horseback riding, award-winning golf courses, wonderful shopping, great eats, and much more. Book tour tickets online and save or call us toll free for assistance with reservations, group tour bookings, and private charter services.

Link to company website.
TOOLS

Tools currently include a Mortgage Calculator and Buyer/Seller Tips. If you would like to have these Tools on your SmartSite, checked the boxes next to each Tool and they will appear under your Resources tab on the website.

MORTGAGE CALCULATOR

Mortgage Calculator is an automatic tool – you cannot edit the fields/information on your Admin Panel.

View of Mortgage Calculator on SmartSite
BUYER/SELLER TIPS

The **Buyer/Seller Tips** are written by you and must be manually inserted. Type your tips in the text box on the main **Tools** page and Click **SAVE**.

**View of Buyer/Seller Tips on SmartSite**

A home is more than just a collection of rooms and walls. A home is where you live, raise families, entertain and relax. Since so much of your life is spent in your home, choosing the right one for you is an enormous decision.

It is important to consider your priorities and the list of features you are looking for in a home. Your HomeSmart Agent will help you define your search parameters and target the ideal properties for you to consider.

Some things you should consider in creating your list are: price, location and your future needs. Everyone is different, and some of us may trade four bedrooms for a big kitchen! A larger backyard may make up for a longer commute to the office. The number of bathrooms may be more important to a growing family, or a single story home might be necessary for someone who has difficulty climbing stairs.

With over six million new and existing homes sold each year in the United States, the options can be staggering! Your HomeSmart Agent will help you narrow down the choices and find the property that best suits your needs.

It may be the very first home you look at, or the very last one, but in either case, we will help you find the place you can call "home"!
SEO Tags

**SEO** stands for **Search Engine Optimization**. The concept to SEO is placing tags of key words on your pages that increase the visibility of your site on search engines like Google, Bing, Yahoo, etc. The higher the site appears on a search engine, the more visitors you will receive. For proper SEO, separate and distinct tags should be used for each page. Guidelines for number of characters are shown for each field on the **SEO Tab**.

### HOME PAGE

#### TITLE

The title section would be how you want your site to appear on the search engine. Keep it simple.

*Example:* Your Franchise HomeSmart DBA – John Smith – Real Estate  
*Note:* The maximum number of characters recommended for Title tags is 60.

#### DESCRIPTION

This is the description that will show up on search engines. Here you will want to include short phrases or sentences with key words the match your content.

*Example:* “Find homes in central Phoenix, MLS Property Search available”  
*Example:* “Specializing in second homes in the Phoenix area”  
*Note:* The maximum number of characters recommended for Description tags is 150.

#### KEYWORDS

Keywords are short tags associated with the Home Page of your website.

*Example:* “Real Estate, Realtor, HomeSmart, Find Homes, Phoenix, Mesa, Sell Home…”  
*Note:* The maximum number of recommended phrases is 20.
These tags will yield search increases on your property listings.

Adding these tags to the Title, Description, or Keywords fields will automatically pull that information into search engines and increase probability that your listings will be prominent on web searches.

```html
<CITY> <STATE> <PTYPE> <PADDRESS> <PMLS>
```

There are special <tags> shown on this page. Adding these tags will make the other tags you enter on this page generic for all listings. Do not modify the <tags> when you added them to your Title, Description, or Keywords fields. (i.e. Do not put your city name between the <>, leave it as “city”)

---

**Note:**
1. The minimum number of characters we recommend for Title Tag is 60.
2. For Dynamic City Based Title type <location> or <city> with keywords (e.g. <city> Real Estate & Search Properties In <city>).
Under the **Other Pages** tab you will find a drop down list for all additional pages on your website. Select the page you wish to add SEO tags to, and the Title, Description, and Keywords fields can be modified for each individual page.
Media Center

The **Media Center** tab allows you to add videos, PDF documents, and photos. All content (including documents and images) will be shown on your **Videos** tab.

**NOTE:** The **Videos** tab only shows if content is uploaded to your Media Center in the admin panel. If no content is uploaded, this tab will disappear from your website.

**UPLOAD CONTENT TO MEDIA CENTER**

**CATEGORIES (LISTINGS, HOMESMART, BUYER TIPS, SELLER TIPS, RESOURCES)**

These categories will show as a menu on the left side of your **Videos** tab. Categories will only become visible on your website when content is uploaded to them in your admin panel. First select the Category that you wish to use (from the list on the left), then click the **Upload File** button.

![Screenshot of Media Center with upload button highlighted]
1. Select whether the content is Media (video), a Document, or an Image.
   a. If the content is Media, you can upload a video file from your computer, or enter a link directly from YouTube.
2. Select whether the content is Public or Private. (It must be marked as Public to show on your website.)
3. Enter Title, Description, SEO Tags, and an Expiration Date (if desired).
4. Upload a Cover Photo. This will show on your website as the thumbnail image for this content.
5. If applicable, upload a Reference Document to accompany your content. This will show as a link below your content icon on your Media Center web page.
Use the Set as Default radio button to make the selected content the first default view when a viewer selects the Videos tab.

In addition to the content that you upload, you will see content that you may download from your brokerage’s site. Check the Display this video on my site checkbox to have the content show on your Videos tab.
This button will launch your website Videos tab.

*View of Videos Tab on SmartSite*
**Smart CMA**

*CMA* stands for *Comparative Market Analysis* which compares the value of a home to others in the area with similar characteristics – allowing the agent to determine a good listing price for the home, or assists a client in determining what a good offer would be to place on a home in a given area.

**CREATE**

To create a CMA report, click on the *Create Tab*.

---

![CMA Report Table](image)

Choose whether you are doing a report for a Buyer or Seller and name your client.
SUBJECT PROPERTY

Enter the the MLS ID of the property and click on the Retrieve Details button. Or enter the non-MLS information of the property and click on the Validate Address button.

When you import from MLS, property photos are automatically added to your report. If you enter non-MLS information, you will have the opportunity to add your own photo for the Subject Property.
SELECT YOUR COMPARABLES

When setting up your Comparables search variables, you must fill in all fields with asterisks in order to proceed. **NOTE:** You must select properties with a SOLD status. Additional statuses (i.e. Active) are optional.

Click on Agent View or Consumer View (two optional ways of looking at your search results) to pull up a list of comparables to choose for your report. Adjust your search criteria to modify the comparables retrieved.
COMPARABLES SELECTION - AGENT VIEW OPTION

Click on the checkboxes of the properties you wish to include in your comparables or click on Add All at the bottom of the screen to check all boxes.

Click on Report at the bottom of the screen to view a **Comparables** pop-up screen with your chosen properties.

Use the **Modify Search** button to return to the search criteria screen.
COMPARABLES SELECTION - CONSUMER VIEW OPTION

Click on Add to Favorites beneath each property to add it to your Comparables for your report.

Click on Report at the bottom of the screen to view a Comparables pop-up screen with your chosen properties.

Use the Modify Search button to return to the search criteria screen.
REPORT POP-UP

Click on the checkboxes to select the FOUR properties you wish to includes as Comparables in your report.

Send

Select the Send button and enter your client’s email address to send them an email showing the Comparables without a full report.

View of the Comparables via Email
Click on Compare to bring up a view of the Comparable in an internet browser.
Short Reports

If you wish to create a short report at this point, you can choose a report option from the drop down menu on this screen. Otherwise, select Save & Next to continue customizing the full report.

Select the Report type and click GO to generate one of three short reports. You can also choose to export to Excel.

View of the Summary Report
View of Cover Sheet

View of Comparables Market Average
If you feel that the subject property pricing needs to be adjusted due to condition of the home in comparison to your comparables, you can show adjustments in this tab. Click the Plus (+) Sign at the right end of the property detail line to add an adjustment.

Enter in a name/reason and an amount for the adjustment. Click on the Plus (+) Sign in this detail box to accept it.
Here you can view the average pricing for the comparable properties. The system automatically suggests high and low pricing for the subject property, or you can override this Suggested Price Range.
Enter all of the anticipated closing costs for the transaction.
CLIENT REFERENCES

Enter any client or industry references that you wish to show on the report.

These references do not automatically pull from your My Website > My Info tab. References entered here are distinct from your website references. However, once references are entered into a CMA, they will populate onto your next CMA so that you do not need to recreate them each time.
CUSTOMIZE

Choose the specific automated pages – generated from the information you have entered into the preceding tabs – that you wish to show in the report.

PROFILE PAGE, LETTER, AND FREE PAGE

The Profile Page, Letter and Free Page are all fully editable here. Click on the thumbnail to show the editing screen for each of these pages.

The Profile page pulls in the information you have entered into the My Website > Pages > About Me tab. Changing the information here will not affect your About Me setup.
The Manage Footer button allows you to choose which pre-defined variables you would like to show on the pages you have selected above. If you uncheck all fields, no footer will appear.
MARKETING

Choose marketing pages to add to your report. The initial pages that you will see are added to your system by your brokerage. You may also choose to upload your own additional marketing pieces from your computer.
Here you can arrange the order in which your pages will print. This is a simple drag-n-drop function. Click on the page you wish to move and drag it to a new position in the list. Be sure to click on Save Order to save your changes.

Select the Download Now button to save a PDF of the report to your computer.
DLP stands for Dynamic Listing Presentation. For our purposes, a DLP is a unique website made exclusively for your report. On this tab you can customize the email that will go out to your client telling them about their website link.

Enter your client’s email address in the Email ID field and click Send to send them the email.
Example of email sent to client

Dear TEST Buyer,

The link below gets you to a web site for your property. On that web site you can stay up to date on what is going on in your area.

The main tab is “real time”, in that it is updated each time you go to the web site. You can click on any of the icons to get more details, and on many of them you can even get a street view.

In the home value tab you can select the properties you think are similar to yours and the system will give you a computerized value. Keep in mind that the computerized model cannot take everything (like condition and location) into account. That is where I come in. The Equity tab allows you to estimate the equity you have in your current home.

If you have any questions, you can reach me on the Q&A tab. Just enter your question and I will get back to you as soon as I can.

The last tab is for any messages or updates I might send you personally, and along the right you can get more information, contact me, and/or do additional property searches.

I think you will like this unique and valuable tool, all of other clients have so far! Thanks again for the opportunity to earn your business!

Regards,
Bobby Lieb

Click on the link below to access your personalized site.
http://hrsz001.marketing.homesmartagent.com/djp/2402_E_ESPLANADE_Lane/Phoenix/85016/940
View of HomeSmart DLP Site

To view traffic on your DLPs, click on the View Track button on the CMA Reports Tab.
CRM

CRM stands for Customer Relationship Management. Our CRM function organizes your contacts based off of sales, interaction, etc. You can upload and create contacts, see the client interaction, view leads, and create groups and more. You can also import and export your contacts to and from your computer.

INQUIRIES

The Inquiries tab is a newsfeed of all trackable activity on your website. Trackable activity includes: a viewer registering on your website; a registered user requesting a property showing; a registered user creating a saved search; etc. Click on View under each lead to pull up a detail screen.
INQUIRIES SEARCH FILTER

Choose which filters you wish to use to refine your search.

Inquiry Status

Inquiry Type = Last action taken by the Inquiry
Custom Tags = Filters you create (i.e. First Time Buyer) in the Custom Tags tab.

Inquiry Rank = Ranks are edited through the Contacts tab Edit function.
Inquiry Creation Date = Date that the Inquiry was added to your admin panel.

Inquiry Business Source = Inquiry Business Source is edited through the Contacts tab Edit function.
Inquiry Birth Date or Anniversary

Inquiries are automatically entered into your Contacts tab; you can also manually add Contacts, or upload multiple Contacts through a .CSV file.

Click on the Magnifying Glass next to each Contact to open up additional functions.
EDIT CONTACTS

To make edits to your Contact, or add informational notes, click on the Edit button.

EDIT CONTACT > DETAILS

Here you can update details about your Contact.
EDIT CONTACT > TAGS

You can add **Tags** to your Contacts for quick searches in the CRM Search function. Choose from **Tags** you create in the **Custom Tags** screen (located on the main CRM screen).

EDIT CONTACT > NOTES

Type in your comments and click the **Save** button.
Notes will show the CRM > Contacts > View screen.

EDIT CONTACT > EMAIL ALERTS

Email Alerts listed here are added whenever a registered user saves a Listing Alert on their profile. When they save a Listing Alert, it will also trigger the system to send an automated email that you design in your Email Templates tab.
EDIT CONTACT > MARKETING MATERIALS

Information here will indicate which marketing pieces have been sent to this Contact. All marketing pieces are generated/sent from your Marketing tab.

<table>
<thead>
<tr>
<th>Type</th>
<th>Material Name</th>
<th>Created On</th>
<th>Scheduled On</th>
<th>Last Sent On</th>
<th>Belongs To</th>
</tr>
</thead>
</table>
EXPORT CONTACTS

Click on the Magnifying Glass under each Contact to pull up an actions bar.

The Add to List button will select the Contact and add it to the selection box at the bottom of your screen. From there you can export the Contact(s) to a Farm, Group, Excel file, or as ‘Hot Inquiries’.

Farms are used in your Marketing Drip Campaigns. Groups work as an internal filing system within your CRM.
**EXPORT TO FARM**

Once all desired Contacts have been added to the list, select the Export to Farm button. You can also create a Farm by doing a search from the left hand panel and then selecting Export All to Farm. Farms may include a maximum of 250 Contacts.

**EXPORT TO GROUP**

Once all desired Contacts have been added to the list, select the Export to Group button. You can also create a Group by doing a search from the left hand panel and then selecting Export All to Group. Groups may include a maximum of 250 names.

**EXPORT TO EXCELS**

Once all desired Contacts have been added to the list, select the Export to Excel button.
**SAVE TO HOT INQUIRY**

**Hot Inquiries** are those Contacts that you wish to keep on top of. Once all desired Contacts have been added to the list, select the Save to Hot Inquiry button. Hot Inquiries can then be searched for from the Search Panel.

**CONTACTS SEARCH PANEL**

Choose which filters you wish to use to refine your search.

**Inquiry Status**
**Inquiry Type** = Trackable actions that can be made by the viewer

**Inquiry Rank** = Ranks are edited through the **Contacts Edit** function.
Inquiry Creation Date = Date that the Contact was added to your admin panel.

Inquiry Activity Date = Date of the most recent trackable activity on your website.
Inquiry Name / Email

Inquiry Business Source = Lead Business Source is edited through the Contacts Edit function.
Inquiry Birth Date or Anniversary

Hot Inquiries – Hot Inquiries are created through the Add to List > Save Hot Inquiry function.
**Inquiry Contact City** = City in the Contact’s contact information

**Listing Alert City** = City in which Contact has created Listing Alerts

**Listing Alert Price** = Price range in which Contact has created Listing Alerts.

---

**ADD CONTACT**

First Name, Last Name, and Email are required fields to manually create a Contact. Check the Create User Account button at the lower right if you wish to make a User ID and Password for your Contact to use on your site (to save searches, etc.)
IMPORT CONTACTS

You can upload a list of Contacts in CSV file format (created through Excel) that you have on your computer.

a. Browse your computer for the CSV file. NOTE: You must have a “Consumer Email” column in your CSV file. Additional columns are at your discretion. You should add a column label at the head of each column to make mapping the fields easier.

b. Click on Upload File.

c. After you have uploaded the file, the import fields at the bottom of the screen will activate. From the dropdown menus, select the columns from your CSV file that correspond with the fields that you want to import.
Groups are created through the Export to Group function on the Contacts tab. Group details can be seen here by clicking on the Group name from the Groups menu on the left side of the screen.

The Edit button will allow you to change the Group name. The Add to Group button will allow you to add the contact to a different Group. The contact will also remain in the original Group until you delete them. The Export to Farm button will make this Group available to use under your Marketing tab.
The Marketing tab allows you to create Drip Campaigns that go out to your clients. To do this you will assign Farms, make your marketing content, and set up the Drip Campaign details.

FARMS

Farms are unique groups of prospects. You create targeted lists, which you can send out via your Drip Campaigns.

Farms can be created by choosing contacts in your CRM > Contacts tab, and utilizing the Export to Farm button. You can also create or upload a Farm directly into this Marketing > Farms tab. However, contacts created/uploaded into this tab are stored here in the Farms tab only, and are not added to your CRM > Contacts database.

Note: Farms may include a maximum of 250 Contacts.
PREVIEW FARM

Previewing your Farm will show you all Contacts that are within that Farm, with the ability to add, delete, and edit the Contacts.

- Preview your Contact
- Delete the Contact from this Farm
- Edit your Contact
- Convert Farm Contact to CRM Inquiry

EDIT CONTACT

Note: Editing a Contact here does not change the Contact information in the CRM > Contacts tab.
From the User dropdown, select the agents with whom to share your Farm. The dropdown is automatically populated with the agents from your brokerage.
In the **Edit Farm** tab, you can upload additional Contacts to your Farm. You can add Contacts manually, or by selecting a CSV file from your computer.

See the Upload a Farm section for additional information.
UPLOAD A FARM

To upload a new Farm, select the Upload Farm button from the main Farms screen.

UPLOAD FARM

a. Name your Farm.
b. Select the Upload File button.
c. Search your computer for your Farm CSV file. NOTE: The CSV file may not have more than 250 contacts. You must have “Name” and “Email” columns in your CSV file. Additional columns are at your discretion. You should add a column label at the head of each column to make mapping the fields easier.
d. After uploading your file, the Map Your Farm Data fields will activate.

To return to the main Farms screen, select the List Farms button at the top right.
MANUALLY CREATE FARM

a. Select the Add Manual Contact button.
b. Input the contact information.
c. Click Save.
NEWSLETTERS

You can create your own Newsletters!

All editing is done through a Rich Text Editor. This function is similar to a standard word processing program. In addition, HTML coding can be manipulated for additional formatting. Refer to the Editing in a Rich Text Editor (RTE) section at the end of the manual for more info.

= Preview your Newsletter
= Print your Newsletter
= Email your Newsletter
= Copy your Newsletter
= Edit your Newsletter
= Delete your Newsletter

EMAIL YOUR NEWSLETTER

The Email button will allow you to send your Newsletter out via email to a single client. If you want to send to a group of people, you can set this up through the Drip Campaigns tab.
CREATE NEWSLETTER

a) Click on the Create button on the main Newsletters screen to start the process.
b) On the Create Your Template screen, click Next.
c) Give your Newsletter a title.
d) Create/edit your Newsletter with the editing buttons. You can cut & paste information from a Word document. Be sure to check your document carefully, as some of the formatting may change. Images will not cut & paste, but can be manually inserted through the Insert/Edit Image button.

This image was manually inserted. Cut & paste from Word did not work for the image.

This information pasted successfully from Word, retaining most of the formatting. Font size changed and indents were lost.

This is a test document. This is a test document. This is a test document.

Name: ___________________________
Number: _______________________

Choice #1: Homesmart
Choice #2: Homesmart
MLS INFORMATION IMPORT

To automatically import information from MLS into your Newsletter, enter the MLS number into the MLS # field and click on GO. Use the Field codes as markers in your Newsletter for MLS information. Click on Preview to see the imported information.

HTML CODING

If you wish, you are able to see/work with the HTML code by clicking on the Edit HTML Source button.
E Cards are virtual postcards that can be sent to clients.

All editing is done through a Rich Text Editor. This function is similar to a standard word processing program. In addition, HTML coding can be manipulated for additional formatting. Refer to the Editing in a Rich Text Editor (RTE) section at the end of the manual for more info.

- = Preview your E Card
- = Print your E Card
- = Email your E Card
- = Copy your E Card
- = Edit your E Card
- = Delete your E Card

The Email button will allow you to send your E Card out via email to a single client. If you want to send to a group of people, you can set this up through the Drip Campaigns tab.
CREATE E CARD

a) Click on the Create button on the main E Cards screen to start the process.
b) On the Create Your Template screen, click Next.
c) Give your E Card a Title.

Create/edit your E Card with the editing buttons. You can cut & paste information from a Word document. Be sure to check your document carefully, as some of the formatting may change. Images will not cut & paste, but can be manually inserted through the Insert/Edit Image button.
MLS INFORMATION IMPORT

To automatically import information from MLS into your E-Card, enter the MLS number into the **MLS #** field. Create your flyer, utilizing the **Agent Broker** and **Property** variable codes as markers in your E-Card for MLS information. Go back to the top of the screen and click on **GO** to finalize your input and pull the information directly in from MLS.

**Initial Editing View and View After “GO”**
HTML CODING

If you wish, you are able to see/work with the HTML code by clicking on the Edit HTML Source button.

FLYERS

You can create Flyers to send to clients through Drip Campaigns.

All editing is done through a Rich Text Editor. This function is similar to a standard word processing program. In addition, HTML coding can be manipulated for additional formatting. Refer to the Editing in a Rich Text Editor (RTE) section at the end of the manual for more info.

= Preview your Flyer  
= Print your Flyer  
= Email your Flyer  
= Copy your Flyer  
= Edit your Flyer  
= Delete your Flyer
The **Email** button will allow you to send your Flyer out via email to a single client. If you want to send to a group of people, you can set this up through the **Drip Campaigns** tab.

**CREATE FLYER**

a) Click on the **Create** button on the main **Flyers** screen to start the process.

b) On the Create Your Template screen, click Next.

c) Give your Flyer a Title.

Create/edit your Flyer with the editing buttons. You can cut & paste information from a Word document. Be sure to check your document carefully, as some of the formatting may change. Images will not cut & paste, but can be manually inserted through the Insert/Edit Image button.
MLS INFORMATION IMPORT

To automatically import information from MLS into your Flyer, enter the MLS number into the MLS # field. Create your flyer, utilizing the Agent Broker and Property variable codes as markers in your Flyer for MLS information. Go back to the top of the screen and click on GO to finalize your input and pull the information directly in from MLS.

**Initial Editing View and View After “GO”**
HTML CODING

Your Flyer is being created in HTML format. If you wish, you are able to see/work with the HTML code by clicking on the Edit HTML Source button.

DRIP CAMPAIGNS

Drip Campaigns are scheduled emails that can be structured to meet the needs of your marketing campaign. For example, you can set up the drip campaign to send an email out 24 hours later, then another two days later, then another two weeks later, etc.
CREATE DRIP CAMPAIGN

You can have a trigger that automatically sends out an email containing your Newsletter, E Card, or Flyer to your targeted audience.

a) Click the Create button on the main Drip Campaigns screen to start the process.
b) You must have a Farm created in order to send out a Drip Campaign. Choose the one that you wish to use for this campaign. Farm must contain no more than 250 contacts, however multiple Farms can be chosen by holding down the Ctrl key.
c) Choose your marketing Category (Newsletter, E Card, or Flyer).
d) Choose your Template from those you have already created.
e) Choose the Frequency with which you want your content to be sent out (one time, daily, weekly, monthly, or quarterly).
f) Schedule the Start Date.
g) If you chose a Frequency greater than One Time, enter the Expire Date for this campaign.
   a. Click on the Plus icon to the right of the fields to add additional templates to this campaign. (No more than 10 total.)
h) If you check Send to Queue the current date & time will be entered in the Schedule Date field. Note: Your email will be sent out immediately upon clicking Save.
PLANS

Plans are very similar to Drip Campaigns, however they have a few extra features. First of all, your brokerage can share with you any plans that they create. This will add to your options when setting up marketing to your Contacts.

- Copy your Plan
- Assign Farm/Group
- View Assigned Farms
- View Plan
- Edit your Plan
- Delete your Plan

To use a Plan that your brokerage has already created, click on the Copy button and enter a new name. Then use the Edit button on your newly created Plan to customize it to your use.
ASSIGN FARM TO PLAN

a) Select a Start Date for this plan.
b) Select the Farms and/or Groups to which the plan will be sent.
c) Click Save.
d) To change/delete a plan that has been assigned, go to the View Assigned Farms button on the main Plans screen.

VIEW ASSIGNED FARMS

From this screen you can see the template name, type, the farm/group it has been assigned to, and when it is scheduled to go out.

= Stop assigned Plan
Click on the Magnifying Glass icon to the right of any line to see a list of contacts in the assigned farm/group. You can search the list, but edits to the list must be done from the Farms or Groups sections under the CRM tab.

<table>
<thead>
<tr>
<th>Name:</th>
<th>Email:</th>
<th>Last Sent Date</th>
<th>Last Activity Date</th>
<th>Unsubscribe Date</th>
</tr>
</thead>
<tbody>
<tr>
<td><a href="mailto:JUANTACRENSHAW@BELLSOUTH.NET">JUANTACRENSHAW@BELLSOUTH.NET</a></td>
<td><a href="mailto:JUANTACRENSHAW@BELLSOUTH.NET">JUANTACRENSHAW@BELLSOUTH.NET</a></td>
<td>-</td>
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<tr>
<td><a href="mailto:info@cairealestate.com">info@cairealestate.com</a></td>
<td><a href="mailto:info@cairealestate.com">info@cairealestate.com</a></td>
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</tr>
<tr>
<td><a href="mailto:BRENDAPHARR@PRUCOOPER.COM">BRENDAPHARR@PRUCOOPER.COM</a></td>
<td><a href="mailto:BRENDAPHARR@PRUCOOPER.COM">BRENDAPHARR@PRUCOOPER.COM</a></td>
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<tr>
<td><a href="mailto:jacob@gulfbelt.com">jacob@gulfbelt.com</a></td>
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<td><a href="mailto:samcollins11@live.com">samcollins11@live.com</a></td>
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<td><a href="mailto:SUZANNEGINTER@YAHOO.COM">SUZANNEGINTER@YAHOO.COM</a></td>
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<tr>
<td><a href="mailto:marciawasham@robertsbrothers.com">marciawasham@robertsbrothers.com</a></td>
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<td>-</td>
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</tr>
</tbody>
</table>

**VIEW PLAN**

You can view the email that has been created by your brokerage for this Plan. Click on the View Plan icon on the Plans main screen. Click on the Name of the Template to open/view it in a new internet browser window.
You can edit the plan that your Brokerage has provided, by clicking on the Edit Plan icon on the main Plans page. You can edit the Plan Name, Category, Template, # of Days the Plan will run, and Subject line, and setup Followups.

**EDIT PLAN**

![Plan editing interface](image)

**OPTED OUT**

Here you can view a list of leads who have opted out (unsubscribed from) receiving information from you.

**OPTED OUT**

![Opted Out leads interface](image)
The **Email Templates Tab** is where you manage your automated emails that go out when potential clients request information or create an account on your web site. This section has special *html coding* that auto-populates the lead information so the email is personalized to the individual client requesting information.

Use the **Email Type** dropdown menu to choose which type of action/inquiry by the SmartSite client that will trigger this Email Template to be sent out. Customize/make a template for each separate dropdown option.

**NOTE:** If you remove the predetermined *{bracketed}* fields your emails will not be personalized. These fields automatically pull in information from the User’s registration and personalize the email to that User.

If you do accidentally delete a bracketed field (or wish to add additional fields), the **Check out the Predefined Variables and Example** button at the bottom of the screen will show you a list of fields that you can add/reinsert into your email template.
Editing in a Rich Text Editor (RTE)

Editing in Rich Text Editor is similar to using a standard word processing software (i.e. Microsoft Word).

NEW DOCUMENT

The **New Document** button will clear all of your work.

![Image of New Document button]

BOLD / ITALICIZE / UNDERLINE / STRIKETHROUGH

These buttons will format your text as **bold**, *italicized*, *underlined*, or *strikethrough*.

![Image of formatting buttons]
JUSTIFICATION

These buttons will justify your text

This text is Left Justified

This text is Center Justified

This text is Right Justified

Full Justified will fill each line of text with extra spaces as needed to make each line reach the left & right margins.

STYLE

Styles are preformatted options that can be applied to selected text.

Red header
FORMAT

Formats are preformatted Header options that can be applied to selected text. Headers can be useful when making hyperlinks within the document (see Anchors).

FONTS

The Fonts Family list gives you many font options to choose from. In addition the Font Size list gives you seven common size options.
TEXT CUT & PASTE MODE

This button toggles Plain Text Mode on & off. You will want the button to be in Regular Text Mode (button selected/depressed) when cutting & pasting from another source. This will keep more formatting from the original text. In Plain Text Mode all formatting will be removed in the cut & paste process.

Cut & Paste: Select the desired text in the original document. Press Ctrl-C on your keyboard. Now in the RTE, select the location where you want the text. Press Ctrl-V.
CUT & PASTE FROM MICROSOFT WORD

This button opens a cut & paste window. Please note that not all of your Word document formatting will be saved in the cut & paste process.

*Cut & Paste:* Select the desired text in the original document. Press Ctrl-C on your keyboard. Now in the RTE, select the location where you want the text. Press Ctrl-V.
FIND & REPLACE

These buttons open a standard Find/Replace dialog box. The Find function is for when you’re looking for a specific words/characters within the window. The Replace function is for when you are looking to replace words/characters with other words/characters instead of manually having to go through and change all of them. The binoculars button defaults to the Find function and the A->B button defaults to the Replace function.

BULLETED/NUMBERED LISTS

These buttons format your text into bulleted or numbered lists. Clicking on the down arrow to the right of each button will open up additional options for formatting your lists.
INDENTATION

These buttons adjust indentation for paragraphs. The quote button is used to define a block quotation within the text.

UNDO & REDO

These buttons will undo or redo recent actions that you performed, in reverse order.
HYPERLINKS TO EXTERNAL WEB PAGES

Highlight the text that you wish to make into a hyperlink (i.e. “Follow this link for more information”). Then click on the chain link button on the left. This will open a new window for your URL information.

GENERAL

Link URL: Copy & paste the URL of your destination web page here. Note: You must include “http://” in front of your URL.

Anchors: The anchors field will only show if you have created anchors within your document (see below).

Target: Choose where you wish the link to open, either in the same browser tab, or opening up a new tab.

Title: The title will show when you hover over the hyperlink text.
HYPER LINKS TO WITHIN THE SAME DOCUMENT

Examples of when you might create a hyperlink within the same document:

- To create a “Back to Top” button so your viewer does not need to scroll up
- To create a clickable index at the top of your document

  a. Designate the anchors (spots to move to) within your document.
  b. Place your cursor in the appropriate spot in your document
  c. Click on the anchor button. This will open an anchor editing window.
  d. Name the anchor location. Note: anchor names may not contain spaces.

  e. Highlight the text that you wish to make into a hyperlink (i.e. “Property A”).
  f. Click on the chain link button on the left. This will open a new window for your URL information.
  g. Then follow the instructions above for Hyperlinks to External Web Pages, choosing an anchor name rather than inserting a link URL. Note: The link above demonstrates linking to another spot within a document.
**HTML CODE**

### CLEAN UP MESSY CODE

This button will attempt to clean up HTML coding that is “messy” or clogging up the back end of the system. Use this if the preview is not turning out the way you expect based on what you show in the RTE. *Note: Make sure to save your work first!*

![Clean Up Messy Code](image)

### HTML SOURCE CODE

This button will open a new window that shows the HTML coding for your document. If you know how to work with HTML code, you may wish to make edits to your document through this window.

In addition, should you have HTML coding from another document, you can paste it in this window. The document you are working on will mirror your original, with all text formatting. Images will need to be re-mapped.

![HTML Source Code](image)
DATE & TIME STAMPS

These buttons will place the current date or time into your document.
HORIZONTAL LINE

This button will insert a horizontal line that stretches the full width of your document.

REMOVE FORMATTING

This button will remove formatting from a selected section of text. You must highlight the text you want to un-format and then click the eraser button.
SHOW/HIDE GUIDELINES

This button will toggles hidden information and guidelines on/off. You will want to have this on (selected) in order to work with Tables.

SUBSCRIPT & SUPERSCRIPT

These buttons will turn your highlighted text into subscript (lowered \( \frac{1}{2} \) line) or superscript (raised \( \frac{1}{2} \) line). This is commonly used for trademarks (i.e. HomeSmart\(^{\text{TM}}\)), or footnotes (i.e. “It has legal meaning\(^{[16]}\)”), among others.
SPECIAL CHARACTERS

These buttons will open window with special character or emoticon options.

HORIZONTAL LINE (FORMATTABLE)

This button will insert a horizontal line that can be formatted to fit your use.
LINE DIRECTION

These buttons affect how your wording runs on a line. Switch to right-to-left if writing in certain languages, including Hebrew or Arabic.

TABLE EDITING

With these buttons you can insert and manipulate a table inside your document. This is a great way to incorporate columns into your formatting.
DELETE TABLE

ROW PROPERTIES
INSERT AND DELETE ROWS

INSERT AND DELETE COLUMNS

SPLIT AND MERGE TABLE CELLS
TEXT AND HIGHLIGHTING BACKGROUND COLOR

Clicking on the button will repeat the last color choice made. Using the dropdown arrows next to each button will show additional options.

CHANGE CSS STYLE

Clicking on the button will open a new window with formatting styles (including font color, line spacing, background color, borders, etc.) which will be applied to the current paragraph where your curser is placed.
This tab functions very much like the formatting options noted above.

**Note:** Some of the formatting applies to the whole paragraph and some to the sentence your cursor is on.

**BACKGROUND**

**Background Color:** Highlighting around text

**Background Image:** Where you can place the URL of an image to be your background

**Repeat:** Set whether or not you want your background image to repeat
**BLOCK**

**Word & Letter Spacing:** Positive numbers will create more space; negative numbers will reduce space.

**Text Align:** Highlight the text that you wish to justify prior to setting this value.

**BOX**

These fields will turn your selected text into a maneuverable “box” that can be individually formatted, sized, and moved in your document. *Note: This feature can be tricky to work with.*
These fields will create a border around your selected paragraph. Marking “Same for All” will give all four sides of your paragraph the same border formatting.

LIST

Turn your selected text into a bulleted list.
BROKER VARIABLES

This drop down menu has predefined agent and brokerage information that you can add to your document. This information is automatically pulled from your system so that you do not need to retype it.

Information available includes: name, address, phone numbers, email, photo…
INSERT/EDIT EMBEDDED MEDIA

Insert a video into your document! You can insert a video that will show and play within your document. You also have the ability to size your video to work within your document formatting. Note: The video will show as a blank box in the RTE window. You will need to Preview your document to see how the video will appear in your finished document.

GENERAL

Type: Choose the type of video that you are attaching. Note: YouTube videos are “Iframe”.

File/URL: Cut & paste the full URL (including http://) into this field. Videos must be hosted on the web, they cannot be pulled from your computer.

Dimensions: You can adjust the dimensions of the video in your document. Keep the Constrain Proportions checkbox checked or your video will become distorted.

ADVANCED

Align: Choose the alignment for your video within the document (left, right, top, bottom).
INSERT/EDIT EMBEDDED MEDIA

Note: Copy and paste from an outside source (i.e. Word) will not work for images within RTE. You must use this button to insert and edit your images.

GENERAL

Browser Image: After selecting your image, if it does not appear within the Preview Window, it will not work within the system and will not be placed in the document. Check your file name to be sure it is a .JPG, .GIF, or .PNG file.
**APPEARANCE**

Alignment: Choose how you want text to wrap around your image.

Dimensions: You can adjust the dimensions of the image in your document. Keep the Constrain Proportions checkbox checked or your image will become distorted.

Vertical & Horizontal Space: These fields will add a buffer (create extra space) around your image. Select a number (1, 2, 3….) to indicate how thick of a buffer you wish to have around your image.

Border: Select a number (1, 2, 3…) to indicate how thick of a border (black) you wish to have. Any buffer entered above will be outside of your border.

**ADVANCED**

Alternate Image:
You can choose a second image that will appear when a viewer “mouses over” (hovers the cursor over) the image.
IMAGE GALLERY

Shows images that you have previously uploaded (into this or other documents). Remove images from your gallery by clicking on the “X” over the thumbnail.

TOGGLE FULL SCREEN MODE