Technology Concepts, Inc.

MyPlace MLS for Agents

Quick Reference Guide

MyPlaceConnection™

for Agents

A product of
Technology Concepts, Inc.

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HOME **3**

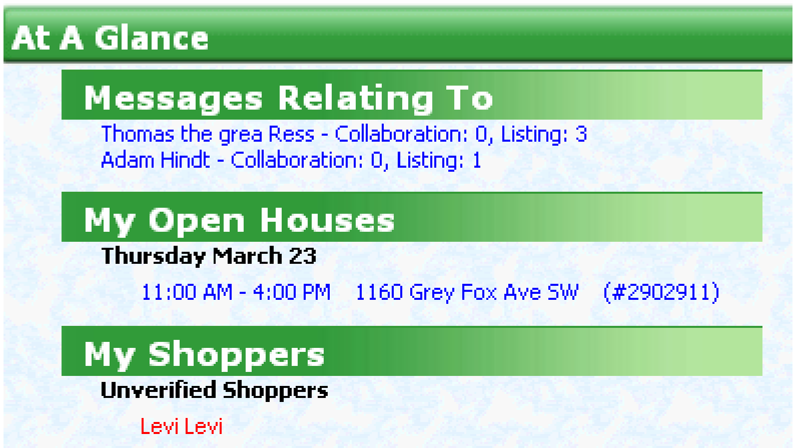
AT A GLANCE 3
SEARCH 3
Find a Property *3*
Perform Search *4*
Clear Search *4*
Save Search *4*
Work With/Connect To (Client) *4*
VIEWS 5
Summary View *5*
Detail View *5*
Add/Edit Web Links *5*
Printing Reports *5*
Generate Report *5*
Print Report *6*
Save Report *6*
Email Report *6*
OPEN HOUSE 6
Add Open House *6*
Delete Open House *6*
Edit Open House *6*
My Tools 6
CLIENT MANAGER 6
My Clients *7*
Review List *8*
Saved Search *8*
Search *8*
CMA *8*
Message Center *8*
Private Notes *9*
MY LISTINGS 9
Shoppers *9*
MY DETAIL BY SHOPPER 9
Selections Manager *9*
HotSheet *10*
Custom Hotsheet *10*
Add a Client *10*
Message Center *11*
Market Stats *11*
Market Performance *11*
Market Meter *11*
Information *11*

This document offers step-by-step instructions for the basic and most commonly used functions in MyPlace.

HOME

At A Glance

At A Glance is an agent specific overview of items relating to clients, open houses and shoppers that may require action or is something new since last log-in.



Messages Relating To – shows there are unread or new messages from your clients. Clicking on the name will take you directly to the message center for that specific client.

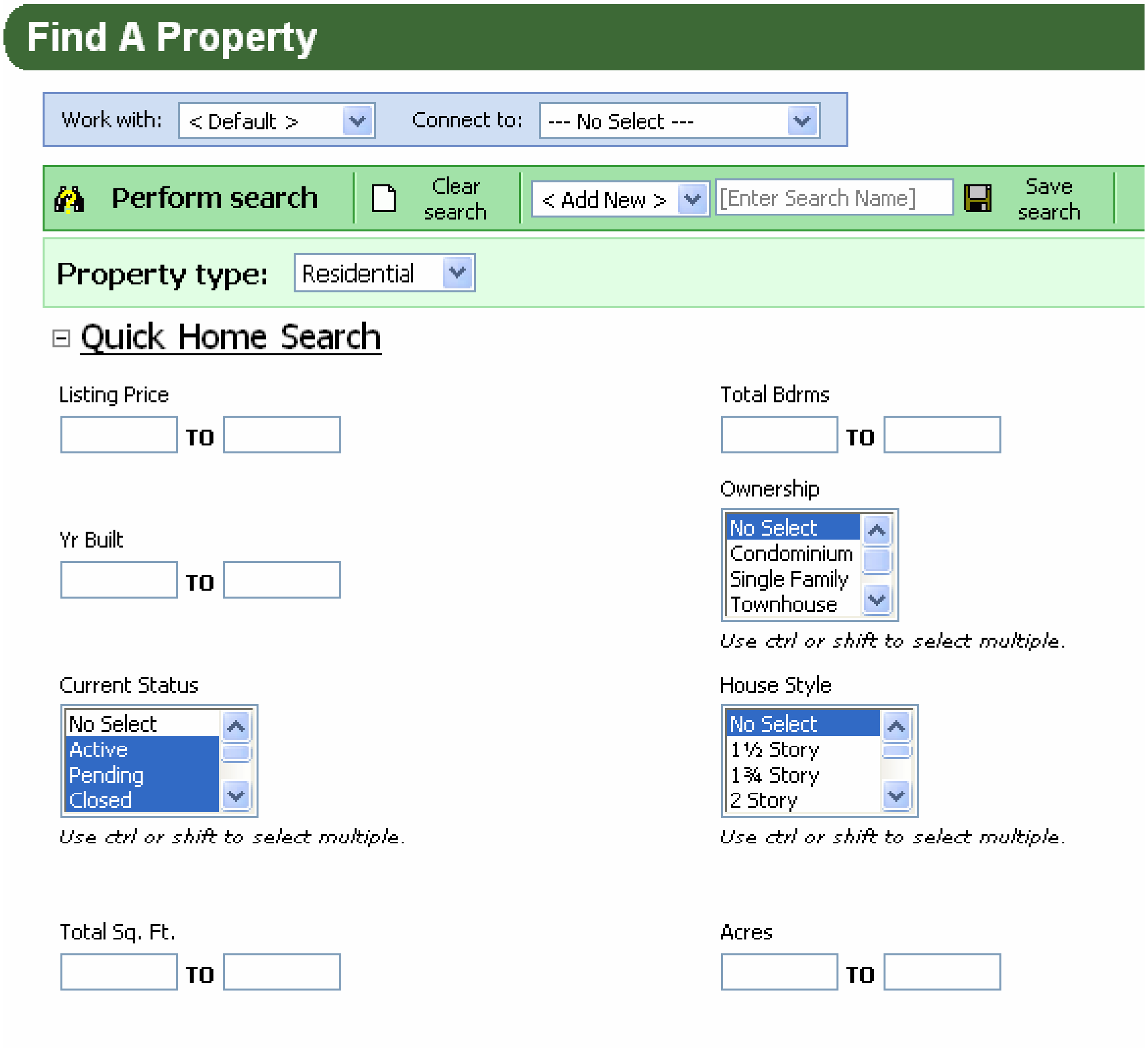
My Open Houses – displays your upcoming open houses that are scheduled. Clicking on the hotlink for the Open House will take you to your open house summary page.

My Shoppers – displays any new registered shoppers or client activity for persons who have designated at registration they are working with you as an agent.

SEARCH

Find a Property

Find a property gives agents the ability to run detailed searches for any property type. Each property type contains a quick search as well as property specific fields found in Address Search, Homes, Property, Listing, etc.



PERFORM SEARCH - Select the desired property type, enter desired search criteria and click the perform search button. Listings will display in summary view.

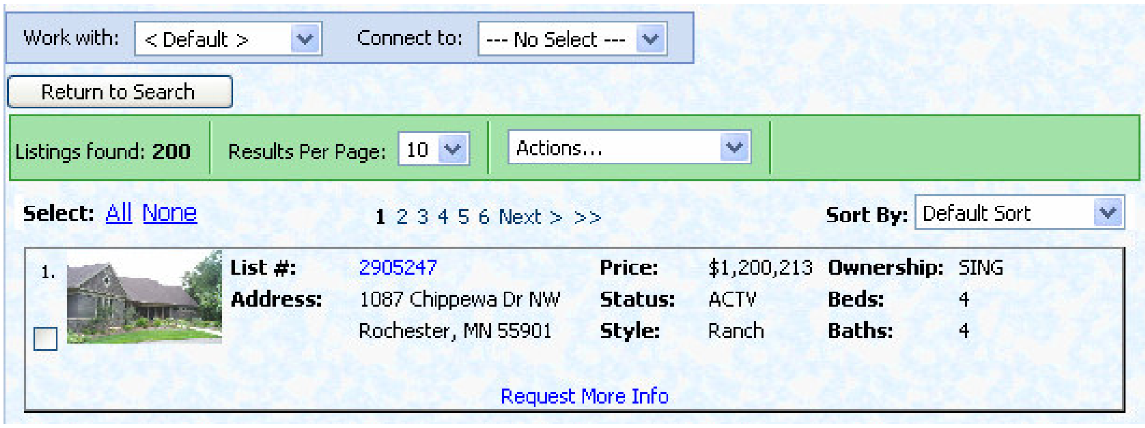
CLEAR SEARCH – Quickly remove search criteria to be able to start a new search.

SAVE SEARCH – Enter desired search criteria, enter a name for your search (*Enter Search Name*) and click the Save Search button. Saved searches are stored indefinitely and can be used any time you log in to the site, modified with more or less criteria or even deleted. Multiple saved searches are available to agents and brokers. (Registered and Attached Shoppers are only allowed one saved search per property type.)

WORK WITH / CONNECT TO – Provides the ability to “work on behalf” of someone in your client list. Click the drop down for “Work With” to select from client manager categories and click the “Connect To” drop down to select the specific name you want to work with. This feature allows you to enable a connection with a specific client and provides the ability to do searches and select listings for a specific client. Direct access to the client’s saved searches is available with this function. Click “Break Connection” to go back to the default search and settings.

VIEWS

Summary View



The summary view allows you to work with/connect to a specific client in your client list. Change the results per page as desired and sort using the “Sort By” drop down. There is a selection box to the left of each property where you can select one or multiple listings to work with through the “Actions” drop down. From the Actions you can print selected properties using the MyPlace Connection reports available (see print reports). Listings can also be added to a selections list (see Selections List).

Detail View

The detail view allows you to work with/connect to a specific client in your client list. The detail view contains all listing information available for that listing. The tool bar also allows you to Print a quick report which will be done with your web browser or click the “Print Report” button to print one of the MyPlace Connection reports available. Mapping, emailing a single listing and a direct link to email the listing agent is available on the tool bar as well.

Add/Edit Web Links - From the detail view of your own listing, Admin Functions are available such as open house (see open house) or the ability to “Add/Edit Web Links” such as virtual tours, or disclosure information.

Add a New Web Link – From the detail or full view of your own listing, click “Admin Functions” and select “Add/Edit Web Links”. Click the “Add New” link and enter the link to the document or tour location. Select the type of link and check the box to display in Ultrex if desired. Click update. The tour or document link is automatically added.

Edit or Delete a Link – Click the pencil to the left of the link to edit, make desired changes and click update. To delete a link, click the “red X” or click the pencil to edit a link and click “delete link”. Click “Yes” to confirm the delete and click “Exit” to return to the detail view of the listing.

Printing Reports

Listing reports are available in any summary view through the “Actions…” drop down or in a detail view from the “Print Report” button. Reports are generated through a report wizard and create a .pdf file allowing the report to be printed, saved, or emailed.

Generate a report - From any summary view of listings, select the desired listing(s). Click “Print Selected Listings” from the “Actions….” drop down. If you are working with a client, the “Prepared for” should auto fill in, you can edit the name, type in a name or leave this field blank. Click “next” and select the desired report from the drop down list. Click “create report” to generate the .pdf report

Print Report –. When the report is generated, click the print icon to print the report or click File | Print for printing.

Save Report – When the report is generated, click File | Save As and name the file to be saved as desired and select the desired location to store the file. Click “Save” button and report is saved to your local hard drive.

Email a Report – When the report is generated, click File | Send and select desired send option for emailing the report. You can also follow the save report steps above and open your email and send the saved file as an attachment.

OPEN HOUSE

Open house displays all scheduled open houses for the upcoming two weeks. Agents can add, edit, or delete their listing open houses in this section. Click the “Show My” button to display only your individual scheduled open houses or click the “Show Office” button to display all open houses scheduled for your office.

To Add and open house - click the drop down arrow and select the desired listing number, date, start and end time. Click the “Save/Add” button and the open house is scheduled.

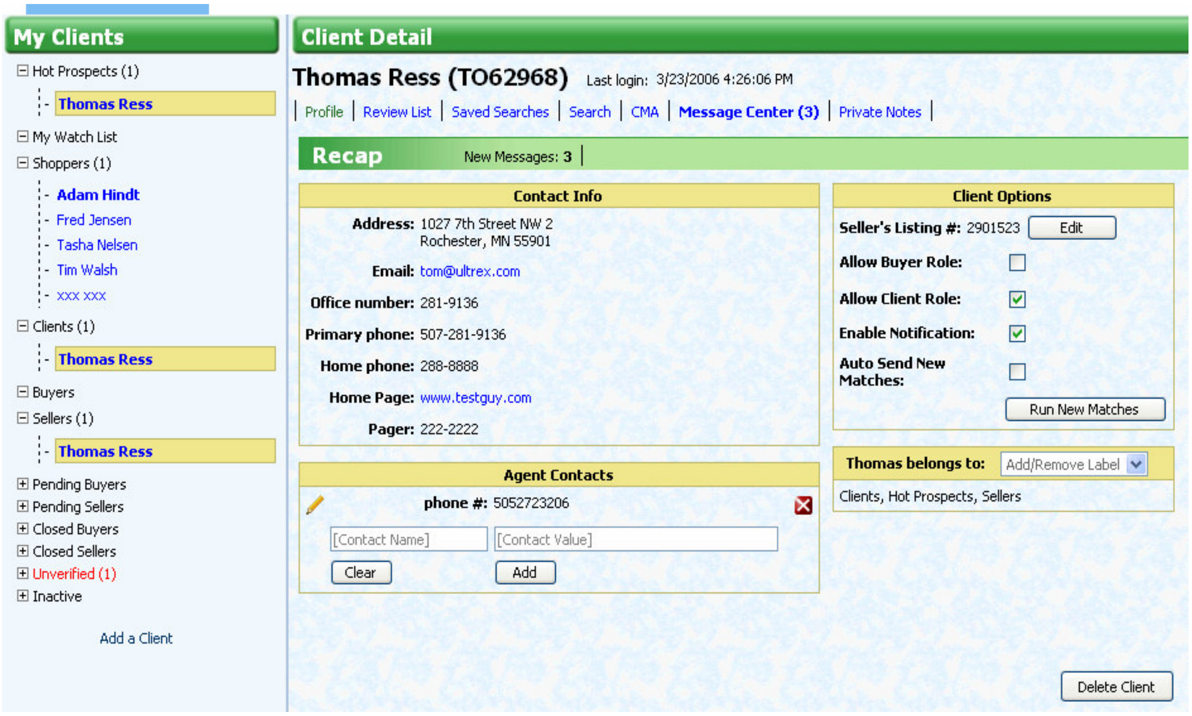
To Delete a scheduled open house – click the “Edit” button to the right of the open house. Click the “Delete” button and click “OK” to confirm the delete. The open house will be immediately removed.

To edit the date or time of an open house – click the “Edit” button to the right of the open house. Change the date or time as desired and click the “Update” button. Changes are immediately posted on the web site.

MY TOOLS

CLIENT MANAGER

The client manager tool provides tools and the capability of managing clients in one location. The individual functions in this feature rich area are described below.



My Clients – Located on the left of the Client Manager screen. Clients are categorized either through system automation such as a pending seller moving to a closed seller when the property they are tied to changes status. Click on a client name on the left to work with a specific client. A Summary of information regarding the client is displayed here such as the Contact information.

Agent Contacts – Allows the agent to enter any desired contact information not contained with the default Contact Info. The "pencil" is used to edit an existing entry and the "red x" is to delete an existing entry. To enter new information enter the type of information and the details desired, click the "Add" button.

Client Options – Clients can be given more roles and actions can be taken that allow the agent to do manual agent picks or have the system generate new matches to the agents saved search for a client.

Seller Role – Click selection box to tie a listing to a seller. Select appropriate listing from drop down, click "Update" button and the seller can now see the web stats for their listing. The system automatically moves the client into the Seller category.

Allow Buyer Role – Click selection box to tie a listing to a buyer. The system will automatically move the client to the Buyer category.

Allow Client Role – Click selection box to provide a client with additional listing information such as that found on a fact sheet minus the agent only items such as commissions, bonuses, etc.

Enable Notification – The system will automatically send updates to the client for new matches to their saved searches and favorites.

Auto Send New Matches – If selected, the system will automatically send the client new matches based off the agent saved search for a client.

Run New Matches – Click the “Run New Matches” button to check the data for any new matches to your agent saved search. The system will check data since last run. The system automatically runs new matches daily as well (usually overnight).

XXX Client Belongs To – Allows agent to manually add a client to a certain category such as “Inactive” or “Hot”.

Delete – Deleting a client is not recommended. Deleting a client permanently removes them from your client list and deletes any connection to them. Inactivating is recommended as the client information is accessible for future contact or follow-up.

REVIEW LIST – Contains all listings selected for the client you are working with to review, add notes or comments to, select for a CMA or print.

To review a specific list, click on the desired item for review such as Client Favorites. Any combination of selections can be displayed by selecting the items and clicking the “Go” button.

Actions that can be taken from a review list are printing reports or adding a selected listing(s) to Agent Picks. Agent Picks will display in your clients new match list designated as being a listing selected specifically by the agent.

Click on the CMA box on the right of the listing to use a desired listing(s) for a CMA.

To send a note or comment on a particular listing click on the “Notes” hotlink located in the summary information of the listing. The new note will appear in the clients At A Glance home page as well as in their message center.

SAVED SEARCH – A summary of the agent saved searches and client saved searches display here with the ability to hotlink or click on a search to take you directly to the search screen. Other information related to the likes and dislikes with regards to client listing activity can be found here.

SEARCH – Takes you to the find a listing search screen connected to the client you are working.

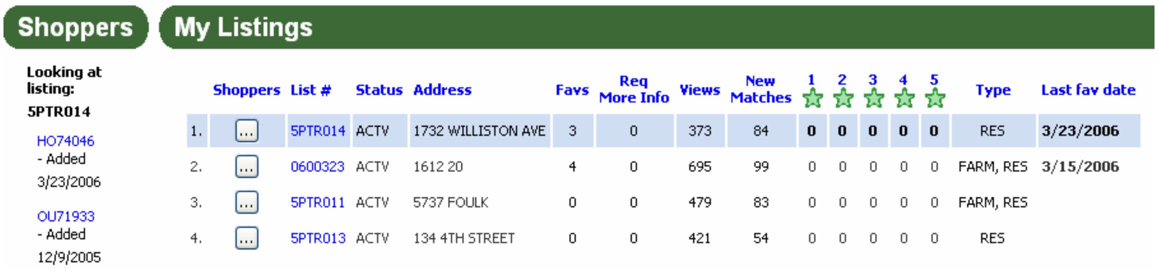
CMA – Listings for a CMA are selected on the clients review list. The CMA is done through a wizard, simply follow along with the steps filling information in as prompted. The CMA allows you to select fields you want to use for your CMA, this is also a step found in the CMA wizard.

MESSAGE CENTER – New or unread messages will be in **bold**. A summary of messages and discussions with your client can be found here. Click on a message to read it type a new message in the text box provided and click the add note to save the message which will be displayed as a new message for the client in their At A Glance home page.

PRIVATE NOTES – Agents can add information, notes or comments that will only be seen by the agent. This area could be used to keep a list of family members, particulars about a client's likes or dislikes in an area that is quickly and easily referenced by only the agent.

MY LISTINGS

My Tools | My Listings displays a detailed overview of activity for your listing. Click on the listing number to see the details of that listing at any time. Fields can be sorted by clicking the title of the field of the field.


Shoppers | My Listings

Looking at listing:
5PTR014

HO74046
- Added
3/23/2006

OU71933
- Added
12/9/2005

	Shoppers	List #	Status	Address	Favs	Req More Info	Views	New Matches	1	2	3	4	5	Type	Last fav date
1.	...	5PTR014	ACTV	1732 WILLISTON AVE	3	0	373	84	**0**	**0**	**0**	**0**	**0**	RES	**3/23/2006**
2.	...	0600323	ACTV	1612 20	4	0	695	99	0	0	0	0	0	FARM, RES	3/15/2006
3.	...	5PTR011	ACTV	5737 FOULK	0	0	479	83	0	0	0	0	0	FARM, RES	
4.	...	5PTR013	ACTV	134 4TH STREET	0	0	421	54	0	0	0	0	0	RES	

Information displayed is: number of shoppers that have the listing in their favorites list, number of shoppers that have requested more information on your listing, number of view or hits generated by this property, number of shoppers that have had the property match their saved search criteria, the star rating of the listing (rated by shoppers) and the date the listing was last added to a persons favorites list.

SHOPPERS – Click on the "Shoppers" button to the left of the listing number to display a list of shoppers that have this listing in their favorites list. A name will display if the shopper is attached to you as their agent, a shopper attached to another agent (dbw or doing business with) will display as such and an unattached shopper displays with an encrypted name; allowing you to contact clients, shoppers or their agents by clicking the hotlink attached to the name.

MY DETAIL BY SHOPPER

The "Detail by Shopper" displays shoppers that have your listings saved in their favorites list. Shoppers ar categorized as a registered shopper, a registered shopper working with an agent, or a client (shopper working with you as their agent). ID numbers identify shoppers unless they have selected to work with you as their agent. Once a shopper has attached to you as their agent, their user name will appear with the ID and they will also appear in your "Client Manager" list. If a shopper is doing business with another agent, this information will be displayed along with that agent name. If a shopper is doing business with another agent, email goes directly to the shopper's agent and not the shopper.

SELECTIONS MANAGER

The selections list (My Tools | Selection Manager) is a temporary holding or work area for selected listings or a list of listings. Find a property gives agents the ability to run detailed searches for any property type. Each property type contains a quick search as well as property specific fields found in Address Search, Homes, Property, Listing, etc. When a listing has been selected from an area such as the summary view, and action has been taken to "Add to Selection List", the selections manager can be accessed from **My Tools** | **Selection Manager.**

An individual listing, all or no (none) listings can be selected for "Actions…."

1. Print Selected – allows you to print one or more listings
2. Open A Saved List – If you have a previously named and saved list you can bring that up to work with that list as well as the list you are working with
3. Save as a New List – You can save a list you are working on by naming the list and clicking the “Save” button
4. Add to List – You can add an individual or multiple listings to an existing saved list.
5. Add to Client – A listing(s) can be added to a client. Select the name of the desired client and click the “Copy” button. This will add a listing(s) to a client’s Agent Pick’s
6. Remove Selected – Click the “Remove” button or Remove Selected action to remove a listing from your working list.
7. Back to Working List – Takes you back to the original list you were working with.

HOT SHEET

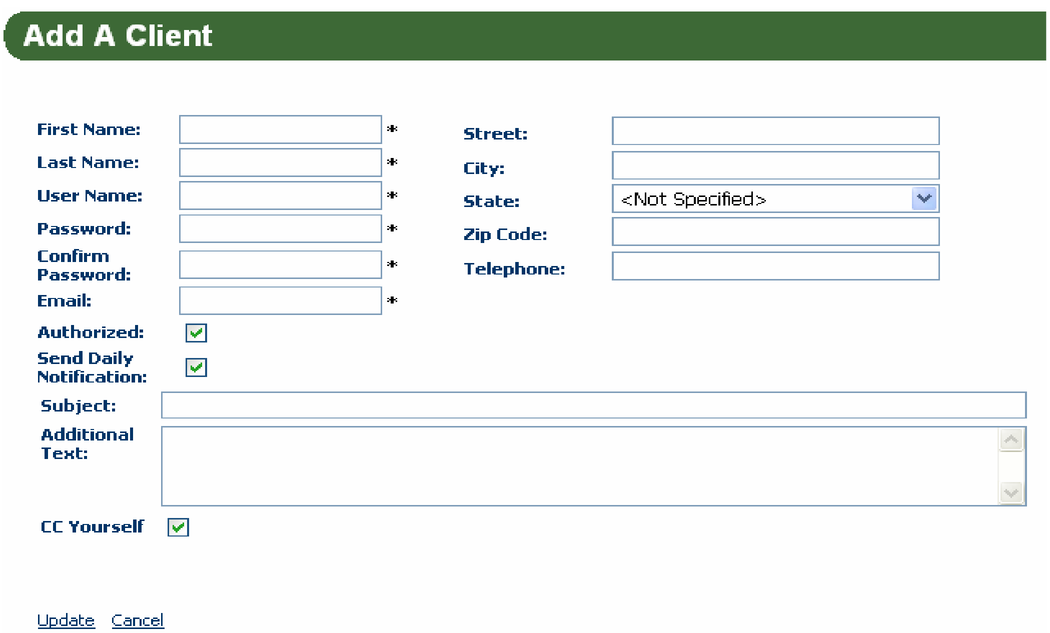
A hot sheet (MY Tools | Hotsheet) of status, price, or contingency changes is available by date or since the hotsheet was last run. Listings can be printed or added to a selections list to be worked with by clicking the “actions….” drop down menu.

CUSTOM HOT SHEET

A custom hotsheet can be created by clicking the “Customize” button. Fields that can be customized are Area, Property Type, Status, City, and Price. Make the desired selections or changes and click the “Update” link to save the custom changes.

ADD A CLIENT

A client can register themselves or an agent can add their own client (My Tools | Add A Client) who will then be attached directly to that agent.



Fill in the contact information as desired and when complete, click the “Update” link. Your client will receive a system generated e-mail fro you containing a link to eht web site inviting them to log in to MyPlace with the username and password provided in the email.

MESSAGE CENTER

New or unread messages will be in **bold**. A summary of messages and discussions with your client can be found here. Click on a message to read it type a new message in the text box provided and click the add note to save the message which will be displayed as a new message for the client in their At A Glance home page.

MARKET STATS

Statistical information related to the local market and shopper activity is available in this section. Data warehousing techniques and statistical methods are used to produce highly targeted historical trend information in user-specified market segments.

MARKET PERFORMANCE

Calculates and displays market trends through several options of chart formats Enter the definition of the desired market segment, press the display chart button, and almost instantly market trend information will display for the segment entered. Charts are based on initial list price, final list price, selling price, days on market, absorption rate, etc. Comparisons can also be done such as house styles in a particular market.

MARKET METER

The market-meter offers information for “real-time buyer preference indexing”. Type in the parameters for the prospect's home or desired property and the system produces a marketability index. This index analyzes the saved searches and favorites lists of system shoppers to generate a demand index. When combined with the current inventory of this type of property, a proprietary algorithm computes a marketability index. This index can be very useful in showing prospects the impact of a price on their home's marketability.
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INFORMATION

General public and Association/Board specific information is found here. Search for an agent or office, find an MLS form, look at a calendar of Association events and more.