Technology Concepts, Inc.

MyPlaceConnection™ Client Management

Quick Reference Guide

***MyPlaceConnection*™ Client Management for Agents**

A product of
Technology Concepts, Inc.

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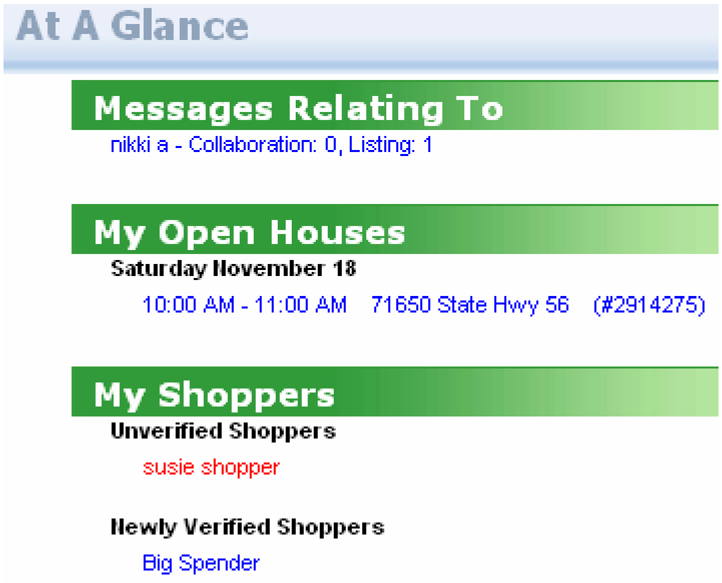
This document offers instruction specifically for *MyPlaceConnection* Client Management.

At A Glance is found on the home page of the *MyPlaceConnection* web site. At A Glance is an agent overview of items relating specifically to actions that can be taken for clients, reminders of open houses and showing who has registered or verified on the site.



Messages Relating To – shows there are unread or new messages from your clients. The customer name will appear and also display if the message is a general collaboration message or a message tied to a specific listing. The client name is hot linked and can be clicked on from the At A Glance screen to be taken directly to the messages for that person.

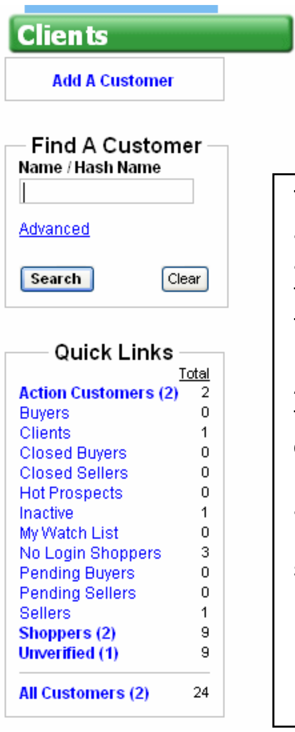
My Open Houses – displays upcoming open houses that are scheduled for the person signing in. Clicking on the hotlink for the Open House will go to the open house summary page.

My Shoppers – displays any new registered shoppers or client activity for persons who have designated at registration they are working specifically with you as an agent. Unverified Shoppers are those who have registered or been added by the agent but have not signed in to verify the registration. Newly Verified Shoppers are those that have registered and signed in to the site. Click the hotlink for a shopper name to be taken directly to their information in the client manager.

Client Manager

The client manager provides tools and the capability of managing clients in one location. The functions in this feature rich area will be discussed in more detail throughout the guide. The client manager is a tool for agents to find contact information, provide collaboration tools, allow agents to see what their clients are doing with listings, their favorite and rejected listings and more. Agents can also keep saved searches for individual clients and view or use client saved search information. There is also a private notes section where notes from conversations, showings, or meetings can be kept.

The Client Manager can be accessed by signing in to the *MyPlaceConnection* site with an authorized ID and password. Click on My Tools | Client Manager.



The client manager screen defaults to clients that have had recent activity or require action or attention. Client information can be accessed by clicking on the name of a client which is a hotlink that goes to the individual client's information. See working with individual clients for additional information on this.

An agent can add Add A Customer and the customer will then be tied to that agent for listing inquiries and the agent will have access to the customers favorites, saved searches and more or if a customer registers on the site and then attaches themselves to an agent the agent will have access to the customer information. The agent will then receive all inquiries, have access to the customer favorites, saved searches and more.

ADD A CUSTOMER

Two types of customers can be added, those with an email account (create login) that will actively log-in to the site and those who may not have internet access or email (no login) and will not be using the site. To add a customer click the Add A Customer hot link found under the Clients module on the left side of the screen.

Login Customer – Click Add A Customer and select create login. Required fields which must be filled in are First Name, Last Name, Email, User Name and Password. Optional information can be filled in such as address and additional contact information. Customers can be assigned different roles for where they are at in a listing transaction.

Is Buyer – Click this box if the customer is a buyer and a listing that is of interest to the customer can be tied to the customer. The system automatically moves them to the buyer category of the client manager and when the listing goes to pending the customer automatically moves to a pending buyer and then when the listing is closed the pending buyer is automatically moved to a closed buyer in the client manager.

Is Seller – Click this box if the customer is selling their home and select the seller's listing to tie the customer to the listing. This allows a seller to see web stats for their listing. The system automatically moves them to a pending seller category when their home is pending and a closed seller when their home is sold.

Is Client – This role is only available to login customers. The client role allows the customer to see additional information about a listing such as what would be given to a customer on a printed fact sheet.

The registration email section is next. This contains the text of the email that will be sent to a customer after they have been added as a customer. Enter the subject desired. The additional text allows the agent to personalize the email or add more information as desired. The system message information follows with a copy option for the agent to receive the email as well as the customer. Click Update when complete and an email will be sent to the customer inviting them to sign in to the site.

No Login Customer – Click Add A Customer and select create login. Required fields which must be filled in are First Name, Last Name. Email is an optional field as well as any additional contact information such as address or telephone numbers. A no login customer can be assigned two roles, a buyer or seller role.

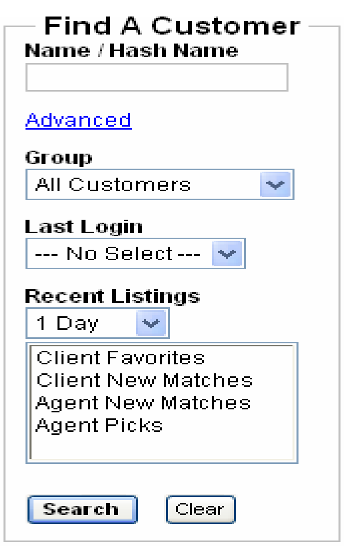
A no login customer can be changed to a login customer at any time by editing the customer profile. In the client manager find the desired customer (see Client Navigation) and from the detail customer view (click the hotlink of the customer name from the summary view) click the edit profile button and follow instructions for a login customer.

Is Buyer – Click this box if the customer is a buyer and a listing that is of interest to the customer can be tied to the customer. The system automatically moves them to the buyer category of the client manager and when the listing goes to pending the customer automatically moves to a pending buyer and then when the listing is closed the pending buyer is automatically moved to a closed buyer in the client manager.

Is Seller – Click this box if the customer is selling their home and select the seller's listing to tie the customer to the listing. The system automatically moves them to a pending seller category when their home is pending and a closed seller when their home is sold.

Client Navigation

The client manager screen defaults to clients that have had recent activity or require action or attention. Client information can be accessed by clicking on the name of a client which is a hotlink that goes to the individual client's information. Client navigation is available on the left side of the screen.



Find a customer – To quickly find a customer type all or part of a customer name or copy and paste the hash (encrypted) name from an email from another agent. Click the Search button and the results will display on the right side of the screen.

Advanced customer search – Click the link to Advanced for additional search function.

Group – This is the category that a client is in. Select a customer group and click the Search button, results will display on the right.

Last Login – Search for customers by their last login date. Click the drop down, select desired time frame and click the search button.

Recent Listings – Search by time period when a client added listing favorites, received new matches to search criteria or were sent agent new matches or agent picks. Select the timeframe from the drop down box and select a recent listing option. Click the search button and any results will display on the right.

Any combination of the above criteria may be entered when searching for customers.

Quick Links

	Total
Action Customers (2)	2
Buyers	1
Clients	1
Closed Buyers	0
Closed Sellers	0
Hot Prospects	0
Inactive	0
My Watch List	0
No Login Shoppers	4
Pending Buyers	0
Pending Sellers	0
Sellers	1
Shoppers (2)	9
Unverified (1)	6
All Customers (2)	22

Quick Links – Is a display of customer categories with a total number of customers found in each category. Click on the hotlink for a category to display all customers in that category on the right side of the screen. Customer categories requiring action or attention are **bolded** and there is a number displayed in parenthesis ( ) which shows the number of clients requiring action within that category.

Customer Summary Information

Search for a customer by name, advanced search or a quick link as previously described. A summary of customer information will display on the right side of the screen.

Client Manager

Name	Hash	Email	Primary Phone	Actions Required	Last Login	Portal Name
a, nikki	NI92735			1 Message	10/4/2006 9:19:18 AM	0 - localhost/dotnetnuke
shopper, susie	SU95517		111-1111	Newly Unverified		0 - localhost/dotnetnuke

Name is hotlinked meaning if you click on the customer name you will be taken to more details for that specific client.

The **Hash** or encrypted name for the client is used for anonymity from other agents. If another agent references your client for a listing they may have in a favorites list another agent only sees a hash (encrypted) name so any emails from another agent will only contain the Hash name.

The **Email** is a hotlink click on the email icon to open a window and send an email to a customer.

Primary Phone is displayed.

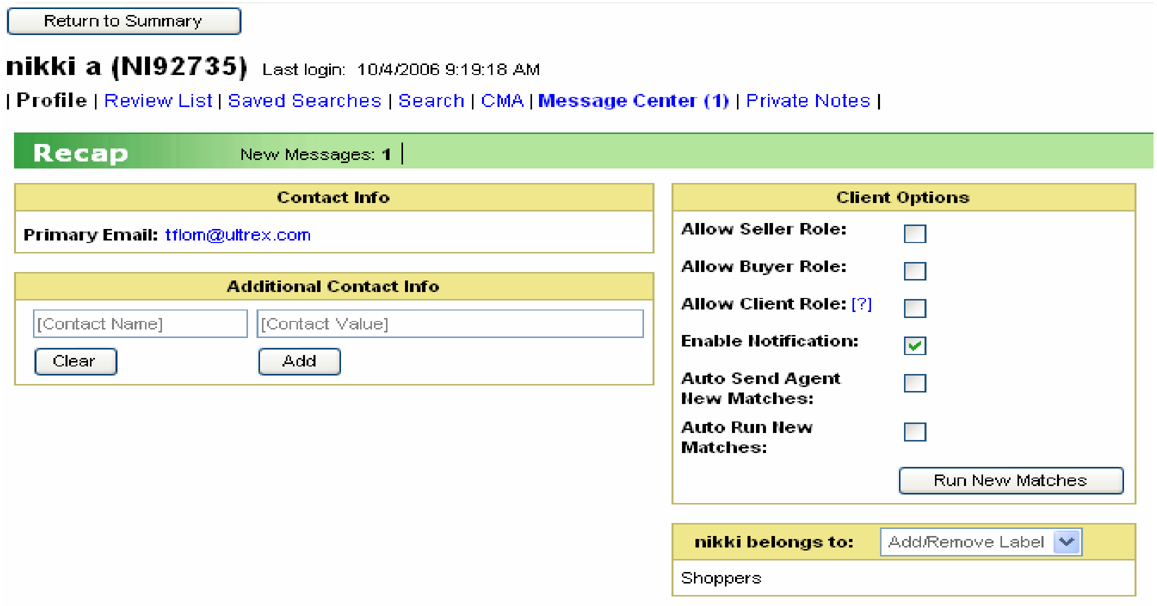
Actions Required will display any recent action or activity for that customer.

Last Login shows the last date and time a customer logged in.

The **Portal Name** displays information on where the customer registered from. The Portal Name will typically show the public web address or an individual agent or office address depending how the customer was registered or added to the site.

Working with Individual Customer Information –

Search for a customer by name, advanced search or a quick link. Click on the hotlink of a customer name to open the customer profile and have access to additional tools.



The **customer name** appears at the top of the screen along with their hash name and last login.

The **tool bar** contains functions available for working with a client. These tools will be discussed in more detail later in this section.

The **Recap** shows any activity requiring attention such as new messages or agent new matches.

Contact Info contains information such as email, address or telephone numbers.

Additional Contact Info is where more customer contact information such as work numbers or additional email addresses can be stored. Enter any desired text in the Contact Name and the Contact Value field and click the Add button. After additional contact information has been added click the pencil to edit the information or the red x to delete a contact information line.

Client Options allow a customer to be given more access to the system for listing details or to tie a customer to a listing where an offer has been made or there is customer interest.

> **Allow Seller Role** – Click the selection box to tie a seller to a listing. Select the appropriate listing from the drop down list and click the Update button. The seller can now see the web stats for their listing and will automatically move through customer categories such as a pending seller if an offer is made on their property.
>
> **Allow Buyer Role** – Click the selection box to tie a buyer to a listing. The system will automatically move the client into the buyer category and pending buyer or closed buyer as they move through a transaction.
>
> **Allow Client Role** – Click the selection box to provide a customer with additional listing information such as that found on a fact sheet minus the agent only items such as commissions, bonuses, etc.

Enable Notification – checking this box will enable the system to automatically send email updates to the customer for new matches to their saved searches and changes to their favorites list.

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

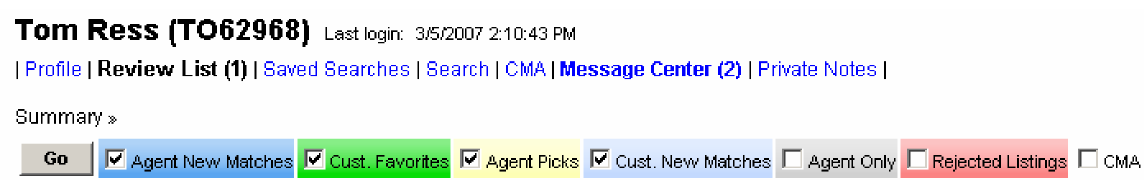
Auto Run New Matches – If selected the system will automatically run a daily search for agent and customer new matches to any saved searches.

Run New Matches – Click the Run New Matches button to check for any new matches to the agent or client saved search since a new match search was last run.

Customer Belongs To – Customers can be added to or removed from the customer category list by clicking the drop down and selecting a category to add to or remove from such as inactive, watch list, or hot customer categories.

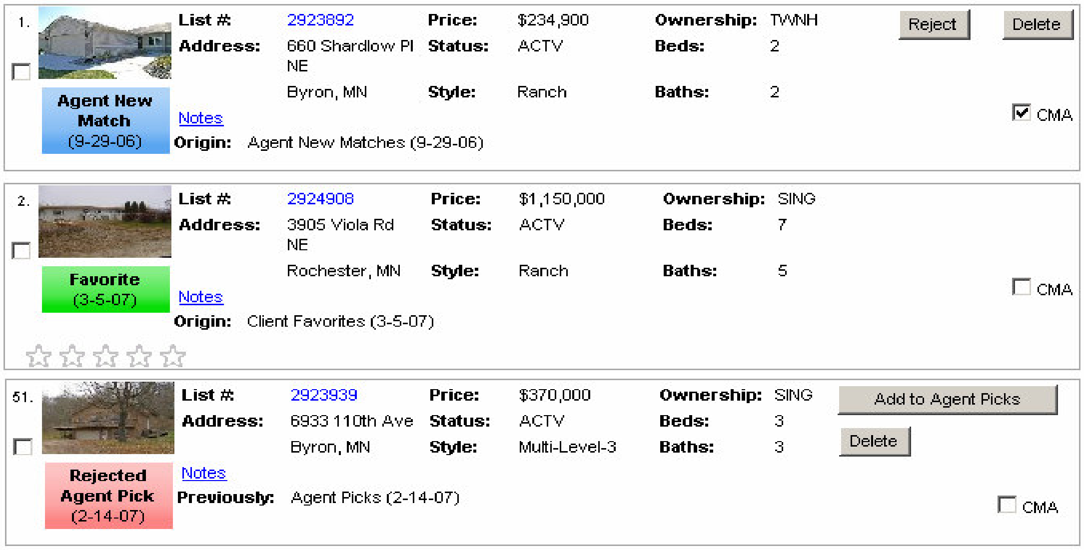
Delete – Deleting a client is NOT recommended. Deleting a client permanently removes them from your client list and deletes any connection to them. Inactivating is recommended as the client information is always accessible for future contact or follow-up.

Review List is an overview of listing activity for a specific customer. Click the Review List hotlink to select desired list(s) to review for a customer.



Listing Selections – Seven types of lists are available for review.

- Agent New Matches are listings the agent needs to review for a customer. These listings come from the agents saved search for the customer.
- Customer Favorites are listings the customer has put into their favorites folder. The agent can only review the list or leave a note on these listings.
- Agent Picks are listings the agent has selected for the customer or that came from the agents search with the option of auto send agent new matches in the customer profile turned on.
- Customer New Matches are listings that come from the customers saved search.
- Agent only listings are listings that the agent wants to put into the customers review list but not let the customer see the listing as picked for them by the agent. This option is used in CMA selections most commonly.
- Rejected listings are listings that the customer or agent has removed from a list or reject.
- CMA listings are listings that are currently used or have been used in a CMA for this customer.



Results from each review item selected display along with a summary of the listing information. Grouping the listing came from such as client favorites, rejects and the date the listing was added to that grouping. Star ratings done by customers of any listings will display and notes can be added by the agent or customer for any listing by clicking on the hotlink to Notes. New notes for a customer will appear in the customer's At A Glance home page when they log in as well as in their message center.

Actions – There is a selection box on the left side of the screen by the listing photo. Listings that an action will be taken on can be checked for selection. Actions for listings are available by clicking the Actions… drop down from the action menu. Select a listing(s) and the desired action to be taken. Some actions can also be taken from within the summary of a listing.

Select listings for your customer that only the agent can see

Select listings for your customer which go into the customer new matches list as an agent pick.

Select listings for other lists or actions to work with at a later time by adding them to the agent selections list.

Select a listing(s) to be deleted from the review list.

Select a listing(s) to be emailed.

Select a listing(s) to be printed to a .pdf report.

Select a listing(s) to be placed in the rejected listings group.

Another action on the review list is to select listings to use in a CMA. On the right side of the screen click the CMA box for listings to use with a CMA. A system message will appear to let you know the selected listing is being saved for use in a CMA.

Saved Searches – To see a summary of any agent and customer saved searches for a specific customer click on the Saved Search hotlink.

My saved searches for nikki

[Nikki A Ranch]
Current Status: Active
Garage Type: Attached
House Style: Ranch
Listing Price: 125000 **TO** 145000

nikki's saved searches

[Residential]
Current Status: Active
Listing Price: 125000 **TO** __

My Saved Searches – Contains a summary of the saved search information an agent has for a customer. Clicking on the hotlink for the saved search will take you to the search screen with the search criteria filled in allowing you to edit and save the search information or work with the search results on a customer's behalf. An agent can have more than one saved search for a customer.

Customer Saved Searches – Contains a summary of the saved search information a customer has saved for themselves. An agent can click on the hotlink for a customer saved search to work with the search criteria filled in on the search screen. An agent can view a customer's saved search and use the criteria to work on a customer's behalf however an agent can not edit or delete a customer's search information.

Customer Activity Overview – Located on the Saved Search hotlink is an overview of the customer's listing activity. The summary is intended to show what the customers likes and dislikes are according to the criteria they are working with.

House

Style	Beds	Stalls	Favorites	Rejected Favorites	Rejected NM / AP
2 Story	3	4	0	1	0
2 Story	5	2	0	1	0
2 Story	5	3	0	0	1
2 Story	6	4	0	1	0
Ranch	5	3	1	0	0

Price

Price	Favorites	Rejected Favorites	Rejected NM / AP
$379,900 - $903,267	1	1	1
$1,426,634 - $1,950,000	0	2	0

Location

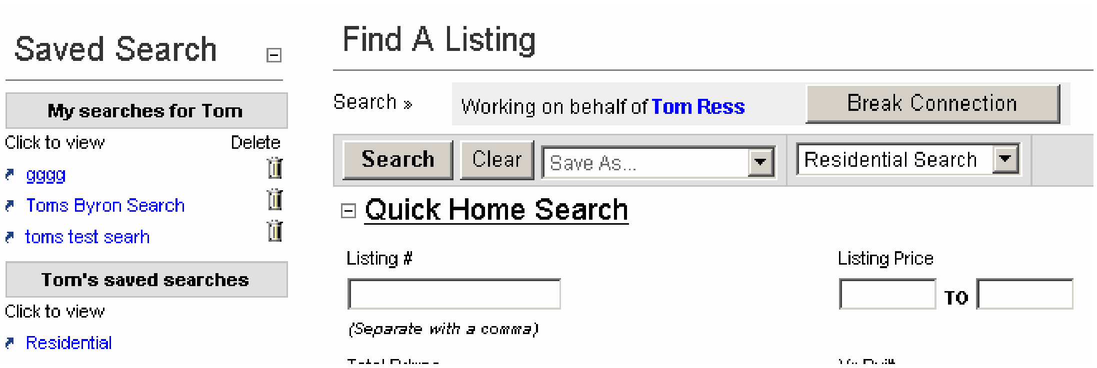
City	High School	Elem School	Favorites	Rejected Favorites	Rejected NM / AP
Kasson	Kasson-Mantorville	Kasson-Mantorville	1	1	0
Pepin	Pepin	Pepin	0	1	0
Rochester	Mayo	Bamber Valley	0	0	1
Rochester	Mayo	Folwell	0	1	0

House information is displayed to show a summary of the listings a customer has been working with. A summary of the style, bedrooms, and garage stalls display along with how many of that criteria are found in the customer's favorites, rejected from the customer's favorites and rejected from the new matches and agent picks.

Price information is displayed to show the price range a customer is looking at along with the number of listings in the favorites and rejected from favorites or new matches or agent picks.

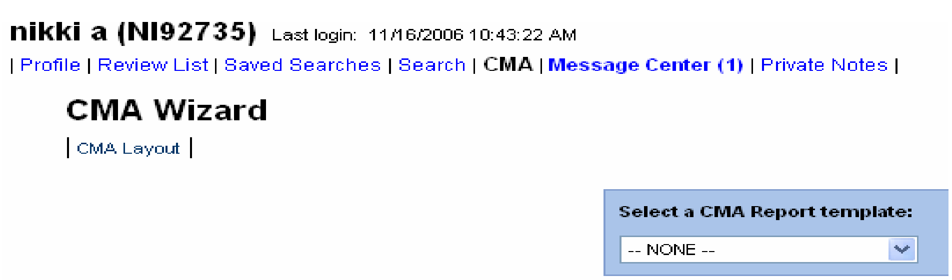
Location information is displayed to show a summary of the areas and schools a customer is working with along with their favorites for that location or rejected favorites or rejected new matches or agent picks.

Search – Click the Search hotlink from within a customer profile to search for listings and work on behalf of a specific customer.



Working on behalf of a customer – Click on the <u>search</u> hotlink from the client manager customer detail page and you are given the ability to work with listing information on behalf of a customer. To stop working with a customer at any time click the Break Connection button located under the Find A Listing bar. Search criteria can be filled in and saved by the agent. An agent can save multiple searches. Enter criteria for a search, click on the save as dropdown box and select add new. A box will appear to name your search, name your search and click on OK. <u>Hotlinks</u> to saved search criteria are available on the left side of the screen. Click any of the search hotlinks to fill in the search criteria and see a summary of the search information. Click the Search button to display the results of a search. From the summary view actions can be taken on the listing information such as printing, emailing, or saving listings to an agent pick list.

CMA – Listings for a CMA are selected from the customer's <u>review list</u>. The CMA is done using templates and a CMA wizard to guide you through creating a new CMA or working with an existing CMA. An existing CMA can be referenced at any time by clicking on the CMA hotlink on a customer's detail page.



Select a CMA Report template from the drop down. System templates will be available as well as any templates that an agent has created and saved for their own use. To begin:

1. Click the drop down and select a report template
2. Click Edit to change the CMA fields as desired
3. Select fields desired from the available list
4. Click save new
5. Name the Custom Template as desired
6. Click Save and Exit
7. Choose template desired
8. Click Next
9. Choose to use an existing listing for the CMA subject property or enter your own subject property
10. Click Existing
11. Enter a Listing number
12. Click Next
13. Enter Adjustments for a comparable

14. The CMA is automatically saved and can be printed from the adjustments page using the print hotlink on the upper right side of the adjustments screen

Message Center –

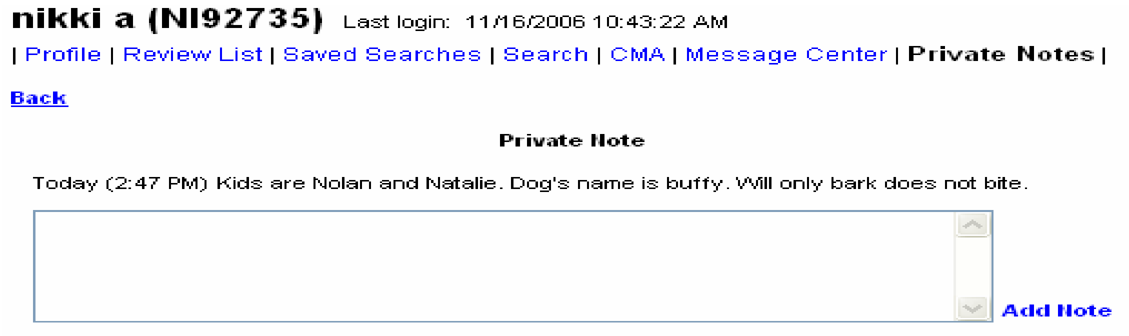
Click the hotlink in General Notes to send a message to a customer. New or unread messages will display in bold. Click on any message to view the entire message conversation or to add more dialog to a message. New messages will display for both the agent and customer on the At A Glance home page.

If the message is related to a listing the summary information will display for that listing along with any messages specific to that customer and listing.

To add a message type the message information into the text box provided and click the Add Note hotlink. Click Back to return to the Message Center summary page.

Private Notes

This is an area within the client manager where you can keep detailed, dated notes of meetings with customers or customer information such as family member names or other important customer information. Private notes are available only to the agent.



To add a private note type details in the text box provided and click the Add Note link. The information added will be displayed along with the date and time the note was entered.