New Associate Resources

The New Associate Resources has some similarities to the old version, but we have strived to make it easy to search for documents, find help and most of all, make it your own personal site. Welcome to the New Associate Resources.

To Log into Associate Resources:

- 1. Go to realtysouth.com homepage
- 2. Agent Login
- 3. You must use your EMAIL address and PASSWORD to log into Associate Resources now.

LOGIN		
E-Mail		
PASSWORD		
	LOGIN	

Overview

- 1. The Left Navigation:
- A. New Associate Resources: These are your Quick Tools



2. The Header:

Essentials	Money Savers	Human Resources	Family of Services	Need Help?	Mv Favorites	v
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- A. Essentials Page:
- 1. New Agent Necessities: This will help the new agents ease into the business and find "Necessities" when starting their real estate business.
- 2. Need to Know Basics : Helpful documents
- 3. Just Listed: A list of documents that most agents need when preparing to list a house.
- 4. Contract Documents: A list of documents needed when writing a contract.
- B. Money Savers Page: Discounts provided to employees and agents of RealtySouth
- C. Human Resources Page: Contains Employee Policies documents, forms, and Agent Documents.
- D. Family of Services Page: One stop shop to find everything you will need or need to know about our Family of Services.
- E. Need Help? Page: Never wonder who you should contact about what! Just click on this page to find the contact information for the appreciate person you need to contact who within the Family of Services.
- F. My Favorites: Old Associate Resources listed these as My Links....now it is My Favorites. A list of all your favorite links which you can now add to and personalize. Example: Add MSN.Com to the dropdown list



3. Search Feature:

Just like on RealtySouth homepage...enter a word in the search box to search:

Example: Smith

All Agents/Staff with the name Smith

Offices with the name Smith

Calendar/Company related items with Smith in the name

4. The Main Page: The Widgets

Customize your page to see only the widgets you want. Choose from the list of Widgets to have on your main page.

Home Screen

When you log into Associate Resources, you will see this screen.



From the Home screen you will navigate where you need to go or what you want to see.

1. Top Navigation:

Essentials | Money Savers | Human Resources | Family of Services | Need Help? | My Favorites 🔹

A. Essentials:

The Essentials page is to help you find Documents and Essentials that you use frequently.

- 1. New Agent Necessities
- 2. Need to Know Basics
- 3. Listing Documents
- 4. Contract Documents



B. Money Savers:

Discounts provided by different vendors for RealtySouth employees and agents.



C. Human Resources:

Easy access to our basic Human Resources questions and answers. Includes all policies or forms associated with Human Resources.



D. Family of Services:

Find Family of Services documents here. InsuranceSouth, Relocation, and TitleSouth/Title Closing Center.



E. Need Help?:

Need to know who to contact? Here is a central location to find phone, fax, email, or web address for all of our Family of Services and corporate staff.

- 1. RealtySouth HelpDesk
- 2. RealtySouth Accounting Dept
- 3. HomeServices Lending
- 4. InsuranceSouth
- 5. RealtySouth Marketing Dept
- 6. RealtySouth U
- 7. RealtySouth Relocation Dept
- 8. TitleSouth
- 9. TitleSouth Closing Center



F. My Favorites:

My Favorites has taken the place of My Links from the Old Associate Resources. All of your My Links are listed here. And now, you can add your own links to your favorite websites. Example MSN.Com

)?	My Favorites 🔻 📔 🖌
	ACT! 2011
Γ	Auburn University
Γ	Courthouse Retrieval
	DAS
Rea	Domain Registration
Ema	eRebs Server
Toll F	Google
Fax:	Listing Activity
	Listing Activity
	Manager's Library
	MSN
	Open House Scheduler
Rea	Open House Scheduler
Fax:	TRAMS
	Trendgraphix Agent Access
	Trendgraphix Broker Acces
	Trendgraphix Corporate Ac
	Update Offices
	Xpressdoc Login
	Add a Link

1. To add your favorite links, click Add a Link



2. Enter the title of the link and the URL. Click Add

itle:	MSN	URL: wv	ww.msn.com	
	Example: Google		Example: www.goo	gle.com
	[Add Cancel]	
		Current Favorites	3:	
	Automa Lini		Demonstra	
	Aubum Oni	versity	Remove	
	Googi	e	Remove	1
	Listing Ac	ctivity	Remove	L
	MSN		Remove	
	Open House S	Schodulor	Pomovo	

3. The link will then be added to your My Favorites list:



2. Quick Tools:



- A. Email:
 - 1. Click the Email key.



2. You are now on the Web Mail login screen.

Realty	South mily of Services
	Outlook Web App
Security (how explanation)
	This is a public or shared computer
0	This is a private computer
13	Use Outlook Web App Light
10	I want to change my password after logging on
Domain'µse	r name:
Password:	
	Log On
Conne Secure	cted to Microsoft Exchange d by Microsoft Forefront Threat Management Gateway Microsoft Corporation, All richts neuerved.

- B. Agent Admin:
 - 1. Click the rDesk key.



2. It is a seamless log in and will take you directly to your dashboard.

Realty Sou	Christee
Dashboard	Add Widgets
Contacts	Activity Snapshot: 07/29/2014 to 07/29/2014 Today All
Calendar	Complete Selected Delete Selected Add Activity
Email	Priority Date Type Category Subject No data available in table
Marketing	Tasks(0) Appts(0) Events(0) Past Due(0)
Tools	Lead Snapshot
Favorites	Eakins, James
Services	Calendar Source: Company Website/Conta

- C. Trio Admin:
 - 1. Click the Trio Admin key.



2. Trio Admin will automatically log you in.

Realty South		
My Profile	Welcome Niki Miller	
Company		
Content	Here's where you'll find even thing you need to:	
Layouts	Here's where you'll find everything you need to:	
Advertising	Customize your website design	
Customer / Client	 Add new pages Update the contact information on your website Create custom listing searches 	
Agent / Employee		
My Website	Select properties to feature	
Tools	Update and enhance your listings View reports on listing traffic	
Reports	······································	
Website Designs		
User Variables	and more! Detailed user guides and training are available to help you learn how to make most of all these tools.	

- D. Document Library:
 - 1. Click on the Documents key.



2. You are now at the Documents Library screen.

Document Library					
Add/Manage Personal Categories	Add/Manage Personal Categories				
Upload/Manage Personal Documents					
All Categories	SEARCH				
266 documents found.					
Document Name	Last Modified Date				
Wile (Video 1) Agent Admin Intro-Start Here	11/23/2011				
WMV (Video 10) E-Marketing	11/23/2011				
WMV (Video 11) Client Activity	11/23/2011				
Wileo 13) Multi-Listing Stats	11/23/2011				
(Video 14) Saved Searches & Jump Searches	11/23/2011				

3. Now to find the Document that you need....There are two ways to search for Documents.



4. Make it personal:

Document Library

+ Add/Manage Personal Categories
Upload/Manage Personal Documents

- 5. Click Add/Manage Personal Categories
- 6. Create Category



- B. New Category Name: Create a specific category name. For example: My Listing Documents
- C. Choose each Document from the Existing Category that you wish to move

into your personal category, click



document (s) from your new category, click 🖳

D. To Duplicate all the existing documents to your new category, click



This will add all the documents to your category.





- E. To go back to the Document Library, click
- F. Once you have your category name created and documents moved over

to go into your new category, click

G. Your new category will now appear under My Categories:

7. Edit Category

All Categories	- New C	Category Name My Category 1	
(Video 1) Agent Admin Intro - Start Here * (Video 10) E-Marketing * (Video 11) Client Activity * (Video 12) Reverse Prospecting * (Video 13) Muti-Listing Stats * (Video 14) Saved Searches & Jump Search * (Video 2) Featured Properties * (Video 3) Client Entry * (Video 5) MLS Search *		Personal Doc 3 Personal Doc 2 Personal Doc 1 Personal Doc 6	
3.) Edit buttons appear My Categories	NCEE (UPDATE)	1.) Click e	dit
Category Nam My Category	10		



B. The screen will display category name and documents.

2.) Category name & documents displayed



8. Once you have created your own categories, you will see this new screen when you log into Document Library.

Document Library



Add/Manage Personal Categories

Upload/Manage Personal Documents

Document Library Home

My Documents

Video	training
	Document Name
WMV	(Video 1) Agent Admin Intro-Start Here
WMV	(Video 13) Multi-Listing Stats
WMV	(Video 3) Client Entry
WMV	(Video 4) Listing Activity
WMV	(Video 7) Appointments & Tasks

9. To get back to the regular document library, simply click:



BUTTONS



The single arrow button moves any selected document(s) from an existing category to the new category document area.



The double arrow button moves all documents belonging to an existing category to the new category document area. This "duplication" of an existing category allows for a quicker category creation process.



The trash button removes any selected document(s) from your new category document area. You can select any number of documents to remove at one time.

CREATE

This button creates your document category and attaches all the documents you have chosen to it. You can create as many categories as you would like with the documents of your choice. No other users will see your personal categories.

BACK This button will take you back to the document library home screen.



This button will update your currently edited category. You can edit the name of your category and you can also add additional documents or remove documents from your category that you no longer want there.

CANCEL	This button will cancel the editing process of your category and will discard any changes that you have made to category name or your documents.
	Note: The Update and Cancel buttons show only when you click on the "edit" button from your personal categories listed at the bottom of your page.
edit	This button will allow you to edit a personal category that you have created. You can change the category's name and the documents that belong to this category. When clicked, the category is displayed above, showing all documents that belong to the category.
delete	This button will delete your personal category. If personal documents are attached to the category being deleted, the personal documents will still be available for future categories that you might create.

- E. Marketing:
 - 1. Click the Marketing key.



2. You are now in the Marketing Department. Marketing is divided into portals to help you search for specific needs. Simply click on the button you wish to view.



- A. Click
 - 1. You are now at the Contact Management screen.



Agent Management Database, How-To Export Lists

Exporting Lists

Mail List Template

Mail Merge/Labels, How To

-MS Office 2007

-MS Office 97-03

2. To go back to the Marketing main screen, click the back arrow at the top of page.



1. Latest and Greatest page displays any new marketing tool, promotion or special you need to know about.



2. To go back to the Marketing main screen, click the back arrow at the top of page.



1. All Listing Presentation documents are located here.



2012 Listing Presentation

AL.Com Iformation Sheet

CraigsList Information Sheet

Facebook Information Sheet

Front Door Informtion Sheet

HomeServices Insurance Homebuyer Flyer

HomeServices of America Companies

LinkedIn Information Sheet

Marketing Share Charts

MySpace Information Sheet

RealtySouth.com Information Sheet

Seller Advantages

Twitter Information Sheet

YouTube Information Sheet





- D. Click
 - 1. Get caught up on Marketing Moments and Observer!



Marketing Moment
January 2012
December 2011
November 2011
October 2011
September 2011
August 2011
July 2011
June 2011
<u>May 2011</u>
April 2011
March 2011
February 2011
January 2011
December 2010
November 2010
October 2010
September 2010
August 2010
July 2010
June 2010
<u>May 2010</u>
April 2010

Observer
September 2011
2011 Second Quarter
2011 First Quarter
January 2011
2010 Second Quarter
2010 first Quarter
2009 Fourth Quarter
2009 Third Quarter
2009 Second Quarter
2009 First Quarter



1. Easy to find helpful need-to-know tools.



Credit Card Charge Request

Free Stock Photography Slick

Lead Base Paint Order Form

Press Release Request

QR Code How-To





- F. Click
 - 1. One stop shop for promotional items!



MagnetsUSA

XpressDocs

VUE Maketing

-Online Store

-Yard Signs

VUE Marketing Credit Card Form





- G. Click
 - 1. One stop shop for Advertising documents and how-to-instructions!



10K Program

2012 Advertising Commitment to Seller

Circlepix

Classified Line Ad

Craigslist Ad Builder

Craigslist Video Training

Do Not Call

Find Our Property Here Slick

New Home Information Sheet

New Home Web Templates

Open House Guest List

VUE Marketing Credit Card Form

Yard Sign Order Form - Agent

Yard Sign Order Form - Office

2. To go back to the Marketing main screen, click the back arrow at the top of page.



- H. Click
 - 1. Get all the Social Media information here.



Facebook Information Sheet

LinkedIn Information Sheet

MySpace Information Sheet

Social Media Guidelines - RealtySouth

Twitter Information Sheet

YouTube Information Sheet

	Ø Marketing Contact Management - Windows
	CO V Reinford Attp://resourcesstg.realtysout
	🗴 🛄 Snagit 🧮 📷
	🚖 Favorites 🛛 🚔 🔁 Suggested Sites 🔻 🖉
I Click	XpressDocs & Printing

1. Find your Xpressdocs login link here, along with other Xpressdocs information and forms from Pete's Print.



Pete's Printing Business Card Form

Pete's Printing Order Form

XpressDocs How to Order

XpressDocs Just Sold Rewards Program



- F. Help and Training:
 - 1. Click on the Help and Training key.



2. Welcome to the Help and Training section:

Help & Training

Step 1		Step 2			
Agent Admin Associate Resources Computer/Laptop Info E-Mail	* E	Adding Images Agent Web Information Custom Domains Editing Text		S	EARCH
documents found.					
		No documents for search criteria	given.		

3. Any document or video associated with training or helpful tips is located here.

Step 1. Category

Step 2. Documents or videos

4. Select the category first and then find the sub category for a list of documents and videos.

Help & Training

Step 1		Step 2	
Agent Admin Associate Resources Computer/Laptop Info E-Mail	*	Contact Management Desktop Details of a Listing Do Not Call	SEARCH
2 documents found.			
On the design of the last			
Contact Client Entry			Last Opdated 12/15/2011
How to enter/import contacts into Agent Ad	lmin.		
Play Video			
View Doc			
Client Activity			Last Updated 12/13/2011
Client Activity is when a contact visits the w activity so that you can track your clients int	vebsi teres	e, looks at properties, or clicks on property detai	Is. This logs the
Play Video			

- 5. When the documents appear, select Play Video or View Doc.
 - A. When you select Play Video, a video will begin to play on your screen.

Contact Client Entry



How to enter/import contacts into Agent Admin.

Supporting Document: Client Contact Entry correct.pdf

B. When you select View Doc, the document will appear.

http://resourcess	tg.realtysouth.com/files/training/webaccess	_folder_creation.pdf 👻 🍫 🗙 🖸 💽 Bing	۵
shagit 🛃 🔄			
avorites 😤 🢽 Suggested	Sites - 🖉 Web Slice Gallery - 🚺 APT	🖉 AR 🔛 TRAMS 🙋 DAS 📑 FB 🔛 GA 🙋 Gmail 🛅 LinkedIn 🖉 M	Ausic
http://resourcesstg.realtysouth.	com/files/trainin	🚵 🔻 🖾 👻 🖶 🖷 Page 🕶 Safety 🕶 Tools	🔞 - 🚢
II	NI E - L I		
How to Cre	eate New Folders		
	Right Click on your		
	name and select		_
Ele Edit View Favorites	"Create New Folder"	eg.	~
😽 🛷 🖉 Clinton, Bill - Outli		😚 * 🔝 - 👘 * 🔂 page * 🕥 Tools *	53
Office Outlook 🗸	o Access	😰 🖬 Find Someone 🛛 🙀 Options 🛛 Clinton, Bli 👻 Log	Off
Concentral to Mission & France			
Connected to Microsoft Conner Mail	Inbox (2 Items, 2 Unroad)	doH 🛞	
Connected to Microsoft dan Mail 《	Inbox (2 Rome, 2 Unroad)	🔞 Hob	
Connected to Microsoft nam Mail 《 Conton, Sin Calendar Biol Contons	Inbox (2 literus, 2 Unread) Image: Search Labox	Concepty Content Concepty to All Concepty Territory and Concepty Territory Content Concepty Territory C	
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Connected to Manual Ann Mail (Cinton, on Calendar Calendar Contoctame Contoctame Contoctame	Inbox (2 literus, 2 Unread) Imbox (2 literus, 2 Unread) Imbox (2 literus, 2 Unread) Scorch Inbox Imbox (2 literus, 2 Unread) Arrange by: Date + Network on tool		
Connected to Harappy Ann Mail Cinton, dh Cinton, dh Cinton, dh Cinton dh Contots Contots Cintots Cintots Cintots Cintots (2) Cintots (2)	Index (2 licns, 2 Unread) Image: Second Index Second Index Anomage: Date + Tenday Image: Second Index Image: Second Index <td></td> <td></td>		
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Concepted to Mexanov Positi Control of the concept Control of the concept Control of the concept Control of the concept Concepted to the concepted to th	Index (2 Lones, 2 Uncod) Image: Construction of the second of the sec		*
Constaté la phones Mai Chi-tor, the Catendar S. Contocts Deleted theme Contocts Deleted t	Interview Image: Construction Image: Construction Image: Construction Search Index Image: Construction Arrange br: Date Nennest on traction Today Image: Construction Image: Construction 9:22 AM Test final i 9:22 AM		*
Concepted to phonometer Point Contents of the concept Contents of the concept Concepted of the concepted of the conce	Index (2 Lones, 2 Unread) Image: Second Index Second Index Arrange by: Date * Index (Verian) Image: Second Index Image: Second Index<		4
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- 6. You also have a search engine
 - A. Type in a word or words for the document(s) you wish to view.



SEARCH

Help & Training

Step 1	Step 2	
E-Mail	 Exchange Setup Instructions Outlook 2 . 	
Listings Mehile Davison	Exchange Setup Instructions Outlook 2	email SEARCH
Social Media	Web Access Polder Creation Web Access Outlook Review	
5 documents found.		
Email Login Instructions		Last Updated 12/13/2011
Stap by stap instruction for logging into an	nail	
Step by step instruction for fogging into er	nan.	
-		
View Doc		
IPhone Setup Instructions		Last Updated 12/13/2011
How to setup RealtySouth email account t	to IPhone.	
_		
View Doc		
Blackberry Setup Instructions		Last Updated 12/13/2011
How to setup RealtySouth email acocunt	on your blackberry.	
Por View Doc		
Droid Setup Instructions		Last Updated 12/13/2011
How to setup RealtySouth email on your A	Android phone.	
reg View Doc		
Google Analytics Widget		Last Updated
ooogie Analytics Wuget		12/15/2011

- B. All documents and videos associated with your search will appear.
- 3. Widgets:
 - A. Your home screen now consists of Widgets.



B. When you first log into Associate Resources, you will have default widgets.

—— Customize 🔽

Select ______ to select the widgets that you wish to show or

uncheck the widgets you do not want to show on your screen.



C. Once you have checked or unchecked your selection, click



E. You can also rearrange your widgets in the order you wish them to show.

SAVE

- 1. To rearrange the widgets: click the top gray banner of the widget
- 2. Drag to the spot you wish to relocate the widget.
- 3. Your page will automatically save your widgets in the order you have placed them.
- F. My Website Traffic widget is a great new tool for agents provided by Google Analytics to help track traffic to your website, RealtySouth.com site, and specific properties.



- A. This Widget gives website traffic for Page Views, Visitors, Visits, and Avg time spent on site.
- B. You can look at traffic on My Website, RealtySouth.com, or your specific property.





- C. You can choose 12 Months, 7 Days view, Monthly view, or 12 months view.
- D. If you click Print i, you can print the graph and statistics to take to a potential client to show how much traffic your site receives, or to show a current client web activity on their property.



E. If you would like to email your listing report to a client, select the listing from the dropdown, then select the Email icon A. Then enter the email address(es) in the textbox. If you want the email sent to multiple people, simply enter email addresses separated by a comma. Note: you will be copied on all emails to your client.

Enter seller's email address below. An email will be sent to your seller each Monday recapping the previous week's activity

Cancel	Save	

F. Your client will automatically receive reports every Monday recapping the previous week's activity along with 12 months graph:



Open House Scheduler

- 1. Log into Open House Scheduler through RealtySouth Associate Resources.
- 2. Click on the My Favorites link at the top of the page.

<u>My Favorites</u>	•	
ACT! 2011		
Auburn Unive	ersity	
Courthouse I	Retrieval	
Domain Reg	istration	
eRebs Serve	r	
Google		
Listing Activit	y	
Manager's Li	brary	
MSN		
Open House	Scheduler	

- 3. Choose Open House Scheduler from the dropdown list.
- 4. Choose a Market Area:

Birmingham	•
Birmingham	
Tuscaloosa	
Huntsville	
Auburn	
Mobile	
Montgomery	
Chilton	
Cullman	
Lake Martin	

CONTINUE

6. Choose a Listing from the dropdown box.



- 7. Click CONTINUE
- 8. Select the Date:

Open House Scheduler

								*No	te: Hosted By will d	efault to the primary li	sting agent if you do n	ot choose a name.
D	ate							Tim	e	Recurring	End Date	Hosted By
					2:00) PM	•	to	4:00 PM 🔻	None 👻		Ann Kirkwood
•	De	ecen	iber	, 201	1	•						
Su	Мо	Tu	We	Th	Fr	Sa	•	to	4:00 PM 👻	None -		Ann Kirkwood
27	28	29	30	1	2	3						
4	5	6	7	8	9	10	•	to	4:00 PM 🝷	None 👻		Ann Kirkwood
11	12	13	14	15	16	17						
18	19	20	21	22	23	24	-	to	4:00 PM -	None -		Ann Kirkwood
25	26	27	28	29	30	31						
1	2	3	4	5	6	7	•	to	4:00 PM -	None -		Ann Kirkwood
Т	oday:	: Dec	embe	er 13,	201	1						

9. Select the time:

Date	Time
	2:00 PM 💌 to 4:00 PM 💌
	2:00 PM 👻 to 4:00 PM 💌

10. If the open house should be recurring, please select from the dropdown: None, Daily, Weekly



11. Remember to set the End Date (only required on recurring schedules).