TeMPO™

User Guide

TEMPO 5.0

MarketLinx®
Real Estate Information Technology

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Contents

Getting Started

System Requirements and Performance

To run TEMPO 5, your computer must have (as a minimum):

- Windows 2000, Windows XP, or Windows Vista
- Microsoft Internet Explorer 6.0 with Service Pack 4 on Windows 2000
- Microsoft Internet Explorer 6.0 with Service Pack 2 on Windows XP
- Microsoft Internet Explorer 7.0 with Service Pack 2 on Windows XP
- Microsoft Internet Explorer 7.0 on Windows Vista
- A minimum screen resolution of 1024 x 768
- 56K modem internet connection (high-speed broadband, such as cable or DSL, preferred)

Microsoft Internet Explorer is the ONLY supported Web browser. AOL, MSN and other browsers will not work with TEMPO 5.

The time it takes TEMPO 5 to display search results is dependent upon a number of factors, including the number of listings matching the search criteria, the speed of the computer's Internet connection, and the capabilities of the computer's hardware.

By performing regular system maintenance, you may be able to improve the performance of TEMPO 5. Defragmenting your hard drive will free up disk space and may even improve the speed at which TEMPO 5 runs. Running the Disk Defragmenter checks for errors on your hard disk and will help ensure trouble-free computing, while running Disk Cleanup clears your disk of unnecessary files.

For more information on maintaining your computer, refer to Windows help.

To run Disk Defragmenter:

1. Click the **Start** button.
2. Click **All Programs** > **Accessories** > **System Tools** > **Disk Defragmenter**.

   The Disk Defragmenter dialog box opens.
3. Highlight a volume in the list (for example, your C:\ drive) then click:
   - **Analyze** — estimates the amount of disk usage and reports on whether you should defragment your disk. View a report or proceed with defragmentation.
   - **Defragment** — begins defragmentation, displaying progress on the progress bar. You can click **Pause** or **Stop** at any time.

To run Disk Cleanup:

1. Click the **Start** button.
2. Click **All Programs** > **Accessories** > **System Tools** > **Disk Cleanup**.

   The Select Drive dialog box opens.
3. Select the drive you want to clean up from the drop-down list, then click **OK**.

The Disk Cleanup for [drive] dialog box opens, displaying how much disk space you can free up.

4. Select one or more files to delete from the list box (optional).
5. Click **OK** to proceed.

Signing In and Out

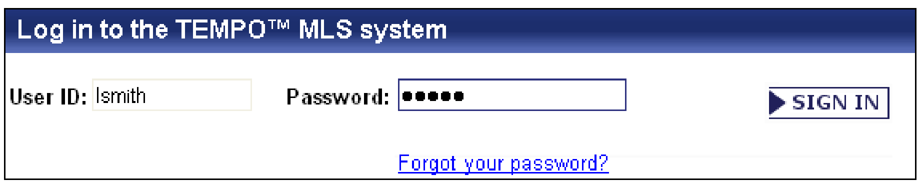
This User Guide assumes that you have a basic working knowledge of the MS-Windows environment, including a familiarity with Windows terminology, navigation, the use of a mouse and keyboard commands. In addition, you should have an understanding of how to use the Internet.

NOTE! *Before you begin using TEMPO 5, review the minimum system requirements. See* *"System Requirements and Performance" on page 2**. You will need the MLS User ID and Password provided to you by your MLS Board.*

To sign in to TEMPO 5:

1. Make sure you are connected to the Internet and launch Internet Explorer.
2. Go to the TEMPO 5 Web address you were given by your MLS.

   The TEMPO MLS system page opens. (Your login page may look slightly different than the one shown here.)



3. Enter your MLS **User ID** and **Password**, then click **Sign In** to begin.

NOTE! *If this is the first time you have logged into TEMPO 5, the Registration wizard appears. Read through the License Agreement and click **Next** to agree to the terms of use and privacy policy. In some instances you may have to scroll down to see the Agree option. Proceed to step #4.*

TIP ... You may want to bookmark the TEMPO 5 URL in your list of Favorites for easy access.

To do this from the Internet Explorer (IE) menu, click Favorites > Add to Favorites.

4. Enter a **Primary e-mail address**.

   Note: Any replies to messages you send from TEMPO 5 will be directed to this e-mail account, so make sure you enter it correctly.

5. Click **Next**.

   A confirmation dialog box opens with your Registration summary information.

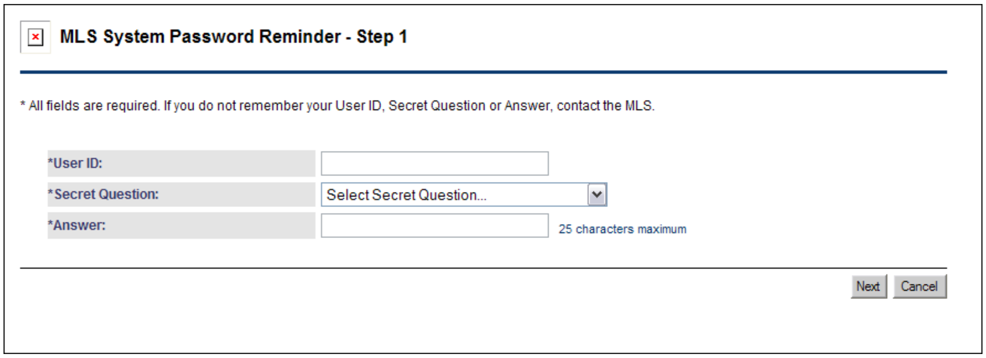
6. Click **Finish**.

   The TEMPO 5 Home page opens.

If you cannot remember your password:

1. On the Log in to the TEMPO MLS system page, click the **Forgot your password?** link.

   The MLS System Password Reminder wizard opens.



2. Enter your **User ID** in the field.
3. Click the **Secret Question** drop-down list and choose the question you need to answer.
4. Enter the **Answer**, and then click **Next**.
5. When your answer has been verified, click **Done** to e-mail your password to your primary e-mail address.

NOTE! *If you don't remember your secret question or answer, please contact your MLS Board.*

To sign out:

- In the top right corner of the main menu (also known as the header bar), click the **Log Off** [] button.

What's On the Home Page?

The Home page is the first page you see when you log in to TEMPO 5.

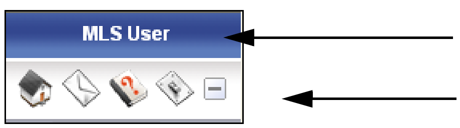
Note: You can change your personal defaults to select a different menu option to appear when you log in. See *"Changing Personal Defaults" on page 42*.

The Home page presents an overview of important information at a glance. It also provides a quick and convenient way to access the main features of the program.

NOTE! *To make the most of your available screen space, press the* ***F11*** *key. This will automatically maximize the TEMPO 5 window by hiding the Internet Explorer title bar, menu bar, and task bar. To restore Internet Explorer to its normal size and appearance, press* ***F11*** *again. Try setting your monitor to 1280x1024 pixels.*

Header Bar Controls

The header bar, located at the top right of the page, displays your Login ID and five header bar controls: **Home**, **Email, Help**, **Log Off** and **Minimize/Maximize** buttons.



To use the header bar controls:

- Click the button of the page you want:
  - **Home** — click this button to return to the Home page.
  - **E-mail** — click this button to compose an e-mail message. See *"E-Mail Messages" on page 129*.
  - **Help** — click this button to view the online Help system and TEMPO 5 version information.
  - **Log Off** — click this button to exit TEMPO 5.
  - **Min/Max** — click this button to expand or collapse the main menu bar and show or hide the icons. See *"A Look at the Main Interface" on page 18*.

Main Menu Bar

Use the main menu bar, located at the top of the page, to access the major functions from anywhere in TEMPO 5.

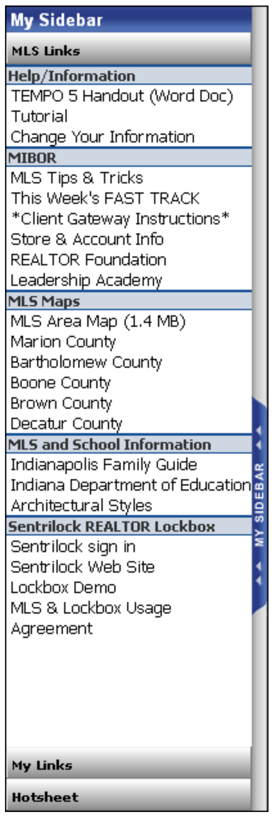
To use the menu bar:

1. Click a main menu command to go directly to the major program area:
   - **Search** — use the **Quick Search**, **MLS Number Search**, **History Search**, **Open House Search** menu commands; or create a more advanced search query using the **Search Manager**. Save your new search query for future reuse.
   - **Hotsheets** — create a hotsheet search for new or changed listings. A summary of the search results is displayed on your TEMPO 5 Home page.
   - **Reports** — create and manage Comparable Market Analysis (CMA) presentations to assist you in pricing a property. Use with the **Report Manager** to create or modify reports using the **Report Editor**. View business reports, such as statistics, RETS member logins, inventories, etc.
   - Prospects — access the **Prospect Manager**, **Contact Manager**, **New Prospect Wizard**, and **New Contact** menu items.
   - **Public Records** — find public tax records for any property matching selected criteria (this feature is not available in all areas).
   - **Financials** — access Buyer and Seller **Netsheets** and the **Payment Calculator** to estimate loan payments, etc.
   - **Member Info** — perform a Member or Office search and set up MLS news (Message of the Day).
   - **My Tools** — set up your user preferences, access the **Staff Tools** and **Change Password** commands and/or change or set up your secret question.
2. Using the mouse, point to a menu item to see a list of related submenu commands.
3. Click a submenu command to access a more specific function.

Point to the **Reports** menu to display a list of submenu commands.

My Sidebar

My Sidebar is a useful panel that can be accessed from anywhere in TEMPO 5 whenever you click it. It uses a vertical tab, located on the left side of the page, to display or hide the panel. It features several resources that allow you to open MLS and personal links. You can add your own personal links so you can quickly access your own favorite Web sites. You cannot, however, change the MLS Links as they are set up and maintained by the Board.



Click the **My Sidebar** tab to show or hide the panel as you prefer.

To display and hide the sidebar panel:

- Click the vertically positioned **My Sidebar** tab once to display the panel. Click the tab again to hide the panel.

To access My Sidebar contents:

1. Click one of the section headers, for example, **MLS Links**, to find a list of available resources.
2. Click the hyperlink of your choice to open it.

To add your own resource links to My Sidebar:

1. From the main menu, click **My Tools > Preferences > Personalize Home Page Resource Link**.

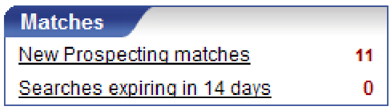
   See *"Personalizing Home Page Resource Links" on page 45* for details.

2. Once setup, click a hyperlink within a Personal category.

   Note: You may have to log out of the system, then log back in to see a newly added resource link.

Prospecting Matches

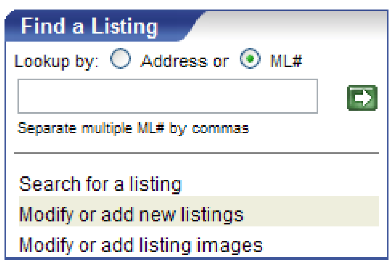
The **Matches** section displays the number of search results for new listings that match saved search criteria (New Prospecting matches).



They are displayed until you mark them "Read." Click the link to go directly to the Prospect Manager. See *"Saving a Prospect Search" on page 99*.

Find a Listing

Enter an Address or MLS number, then click the arrow button to quickly locate a listing.



Click one of the links (**Search for a listing**, **Modify or add new listings**, or **Modify or add listing images**) to access other common functions. See *"Quick Search for a Listing" on page 65*.

Inventory Watch

The **Inventory Watch** section has a number of listing-related links and the corresponding number of results for each, based on the previous search.

Note: The Inventory Watch also includes listings for which you are the co-listing agent.

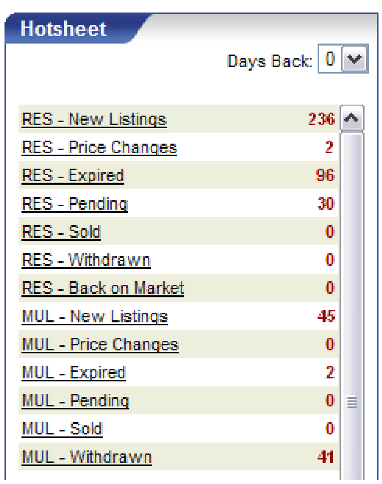
- Keep track of the number of Active Listings, Pending Sales, Office Listings etc., then click a link to go to the listing search results page.
- Click the **Refresh** link to see the most recent numbers for the specific search criteria.

See *"Saving a Prospect Search" on page 99*.

Hotsheet

This section displays changes to your **Hotsheet** listings since the previous day.

The Hotsheet list has been extended to include many more links than before.

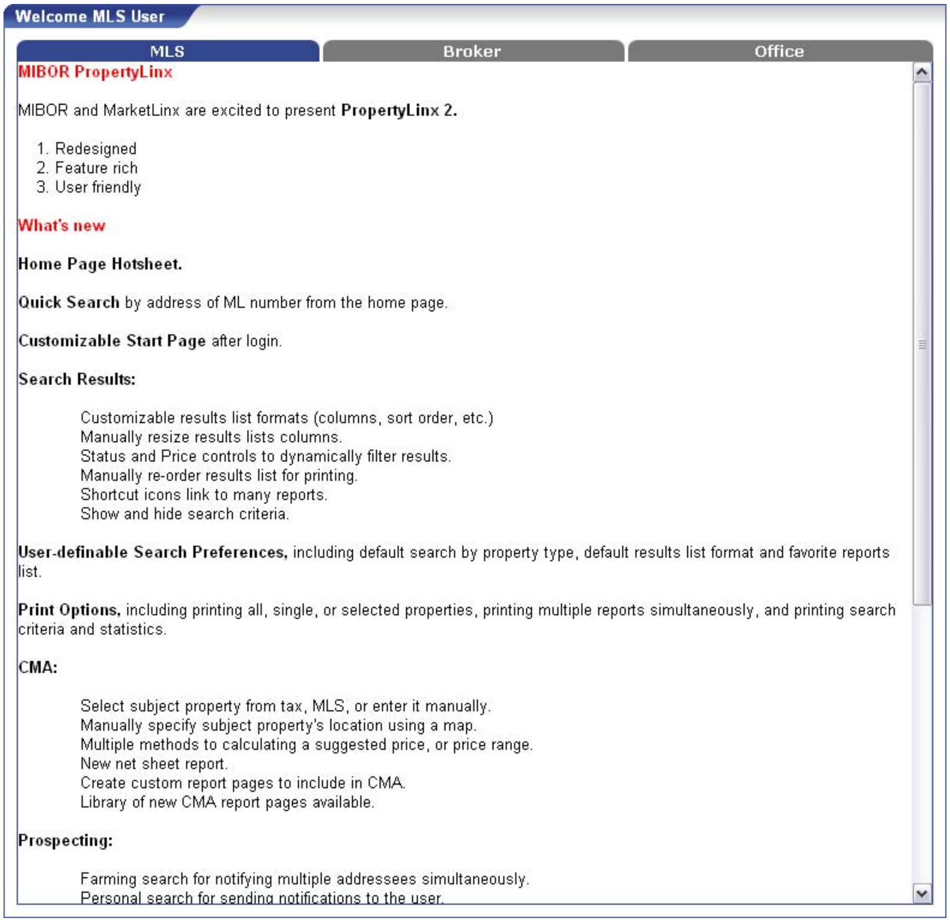


- Click a link to go to that hotsheet.
- Click **Change my criteria** to update your saved hotsheet criteria.
- Click **Refresh** to renew the numbers, based on the search criteria.

See *"Viewing Today's Hotsheet Summary" on page 138*.

Using the MLS, Broker and Office Tabs

The MLS section functions as an "electronic bulletin board" and is a useful area where you may read up-to-date news and information that may affect TEMPO 5. Click the **Broker** or **Office** tab to see news that is specific to your brokerage and/or office, such as current events and issues.



Identity Sharing

You can invite other members of your office, such as an assistant or a team member, to log in and work in TEMPO 5 on your behalf (up to a maximum of 20 users).

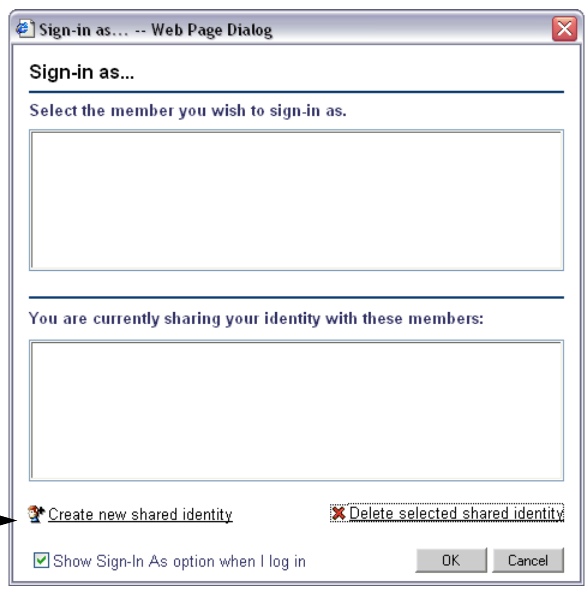
The invited user will "assume your identity" and therefore have the same user class privileges as you. For example, if you are an office manager with office level privileges (Joan Swanson in the screenshots below), the invited user (Ken Smith) will also share your office level privileges. If any modifications are made to listing records, TEMPO 5 will record the User ID of the person who actually made the changes (Ken Smith).

NOTE! *All users must have their own personal login and password.*

To invite another member to share your identity:

1. On the header bar, click the **[your name]** link.

The Sign-in as dialog box opens.



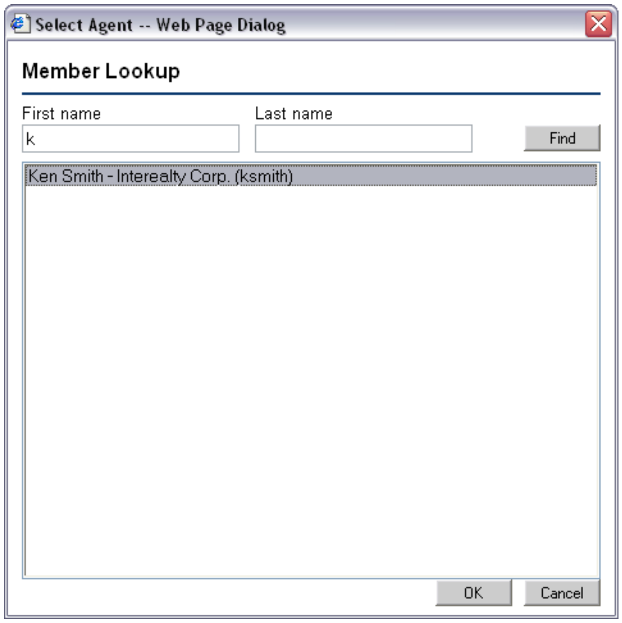
Click the link to find a member to share your identity with.

2. Click the **Create new shared identity** link in the bottom left corner of the dialog box.

   The Member Lookup dialog box opens.

3. Search for a member by entering the **First name** and/or **Last name**, in full or in part. Click **Find**.

A list of current members matching the criteria is displayed.



4. Highlight a member (one at a time) in the list, and then click **OK**.

   The name appears in the **You are currently sharing your identity with these members** list located at the bottom of the Sign in as dialog box.

The User ID appears in brackets after the member's name.

5. Once you have finished adding names of members you are sharing your identity with, select the **Show Sign-In As option when I log in** check box.
   This ensures the Sign in as dialog box is displayed immediately after login.
6. Click **OK**.

   This person (Ken Smith in the example) is now able to log in as you from his computer.

To remove the invitation to share your identity:

1. Open the Sign-in as dialog box.
2. Highlight the invitee's name in the **You are currently sharing your identity with these members** list.
3. Click the **Delete selected shared identity** link in the bottom right corner of the dialog box.

   A message box appears asking you to confirm the deletion of the selected shared identity.
4. Click **OK**.

The Basics

A Look at the Main Interface

Like many applications, TEMPO 5 is designed to have certain standardized features and page elements in common with other programs. For instance, you will find a main menu bar along the top of the page, as is the case with most applications. Your familiarity with a menu bar lets you begin using the program right away. See *"Main Menu Bar" on page 7*.

Some controls and terminology are more specific to TEMPO 5, such as My Sidebar, and words like "hotsheet" that are specific to the real estate industry. This section briefly describes the main controls and page elements in TEMPO 5 and how they work.

Collapsing/Expanding the Main Menu Bar

Use the main menu bar, located at the top of the page, to access the major functions from anywhere in TEMPO 5. When the buttons are displayed, the menu bar is also known as a toolbar.

To save space, or perhaps as a personal preference, you can collapse the toolbar and show only the text labels.

To collapse the toolbar:

1. Click the **Minimize** button [].

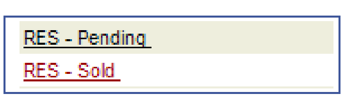
   The menu collapses, showing only the menu commands, not the buttons.

2. Click the **Maximize** button [].

   The menu expands, showing both menu commands and buttons.

Links

Hyperlinks (links) are text or graphics that you can click to go to another Web page or open a document or image. For example, in the Home page, there are links available in the **Hotsheet** section.



Text that is underlined usually indicates a hyperlink.

To view a hotsheet:

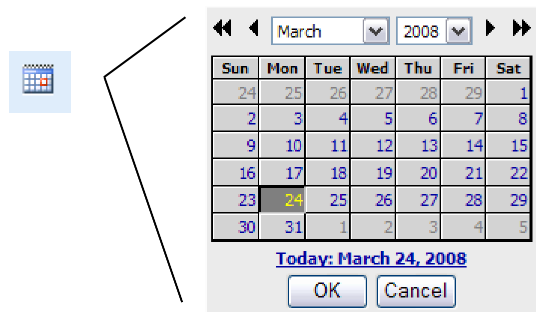
- Click the appropriate link.

Field Related Controls

There may be a list of selections available for entering values on forms, such as when you are specifying search criteria in the TEMPO 5 Search Form. The following field related controls make it faster and easier for you to enter values.

Calendar Pop-ups

Date fields accept only numeric entries that are in the format [**m/d/yyyy**] to be valid. Each date search field has a **Calendar** button next to the field that makes inserting a date much easier.



To insert a date:

1. Click the calendar icon to display the calendar.

   Note: By default the calendar displays Today's date.

2. Click the following:
   - **Previous Year** [ ], **Next Year** [ ], **Previous Month** [ ], **Next Month** [ ] buttons.
   - The **Month** drop-down arrow to select a month and the **Year** drop-down arrow to select a year.
3. Click the date directly to choose that date.
4. Click **OK**.

Pick Lists

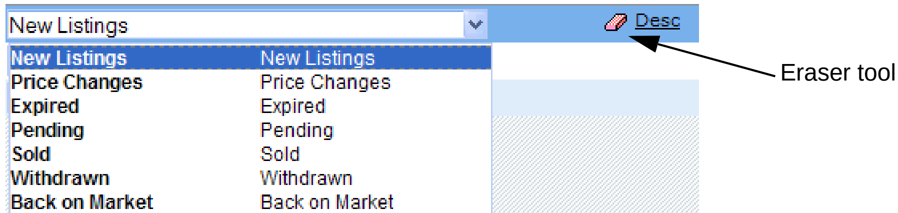
The Search Criteria page has a series of expandable drop-down lists, called pick lists or multi-select lists, that allow you to select one or more items and insert them into the search field.

NOTE! *If you know the first letter of an item, simply type it in the field. TEMPO 5 will automatically highlight the first matching list item. Press* ***Enter*** *to select the highlighted item.*

To use a pick list:

TIP ... Press F7 to automatically expand the pick list. Press F7 again to collapse it.

1. Click the down arrow [ ] to expand the list.



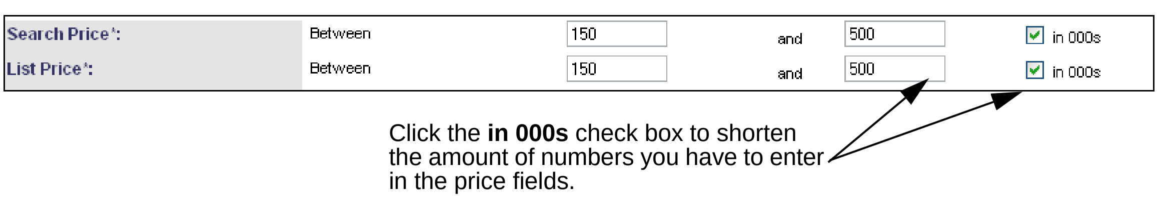
2. To select one or more items from the list:
   - click an item to add it to the field.
   - double-click anywhere in the expanded list to select all items.
   - type the first letter of the item's **Desc**, or the item's short **Code** to select the item.
3. To clear one or more items from the list:
   - click a highlighted item to de-select it; or hold down the CTRL key and click multiple selected items to clear them.
   - double-click anywhere in the expanded list to clear all selected items.
   - click the **Eraser** button at any time to clear all selected items from the list.
4. Press the ***TAB*** key to advance to the next field and close the list; or click the down arrow again to collapse the list.

Eraser Tool

This button [ ] makes it easy to clear all selections in a field, especially when you have selected a long list of values. Clicking to de-select all values one-by-one is time consuming. Use the **Eraser** button to clear the field and start over.

Prices in Thousands

To reduce the number of zeroes you have to type into each **Price** field when specifying search criteria, use the "multiples of 1,000" feature.



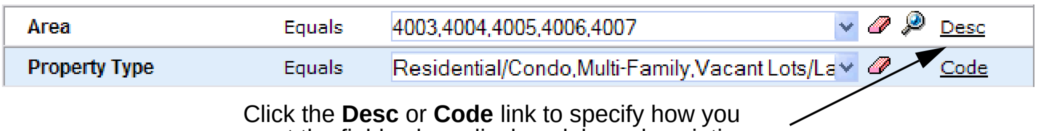
To abbreviate the Price field value:

- Select the **in 000s** check box after a price field.

  TEMPO 5 will automatically recognize the field value as a multiple of 1,000. For example, 150 will be 150,000.

Short Codes

You have the choice to display pick list values as a long description or as an abbreviation (short code) in a search criteria field. Short codes are good for saving space when there are multiple values.



Click the **Desc** or **Code** link to specify how you want the field values displayed: long description or abbreviated.

To use the short Code or Desc links:

- Click the **Code/Desc** link to switch between long descriptions or short abbreviations.

NOTE! *The Listing Maintenance pages have an* ***Option List Display*** *drop-down list that lets you specify how the information in pick list fields is displayed: default, long description or short code. See* *"Adding a New Listing" on page 114*.

Viewing, Sorting and Filtering

There are several ways to make viewing a long list of records easier and more relevant to what you need to do. You can sort, rearrange, and narrow the list.

Resizing the Column Width

Information displayed in a column may be truncated from view. You can easily stretch the column to see the information.

To resize the column width:

1. Using the mouse, point to the edge where the two column headers meet.

   The pointer becomes a double-sided arrow.

   Note: You may be prompted at this point by an Internet Explorer message box asking if you want to turn off the "Best Fit All Columns" option. Click ***OK****.*

2. Hold down the mouse button and drag the pointer to move the split line and resize the column width.

Footer Bar Controls

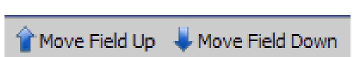
The footer bar, located at the bottom of the Search Criteria and Results tabbed pages, contains controls that let you change the view of a list of records. For example, you can move fields up or down, narrow the listings view, etc.

To use the footer bar controls:

1. Highlight a field on the Search Criteria page, or select a row on the Search Results page.
2. Click the button of the action you want to perform.

Reordering Search Fields

You can change the order of a selected field on a Search Criteria page.



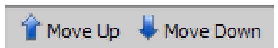
To reorder a field on a Search Criteria page:

1. Highlight the row in which the field is located.
2. Click either the **Move Field Up** or **Move Field Down** button located in the footer bar.

3. Continue clicking the button until the selected field row is in the desired location.

Reordering Records

You can change the order of a selected record in a list of Search Results.



To reorder records in a list:

1. Select the record you want to move.
2. Click either the **Move Up** or **Move Down** button, located in the footer bar.
3. Continue clicking the button until the selected record is in the desired location.

Reordering Columns

You can change the order of columns on a grid by dragging-and-dropping a column header to a different location.

The column in motion turns translucent to indicate that it is being relocated.

To reorder columns on a grid:

1. Using the mouse, click on the column header you want to move (e.g. MLS#).
2. While holding the mouse button, drag the header across the row to a new location in the grid (atop another header), then release the mouse button.

   The entire column relocates to the new grid location.
3. From the Action menu, select **Save Grid**, then click the arrow button.

   A message box appears confirming that the grid changes have been saved successfully.
4. Click **OK**.

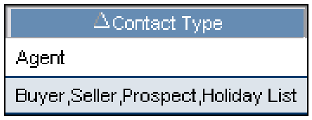
Sorting the List of Records

You can sort a list of records, such as on the Contact Search Results page, to display the list in alphabetical order. Contact lists can be sorted by first or last name.

To sort a list by a single column:

1. Click a column header, for example **Contact Type**.

A small arrow appears, pointing in the current sort direction; up for an ascending or down for a descending sort.



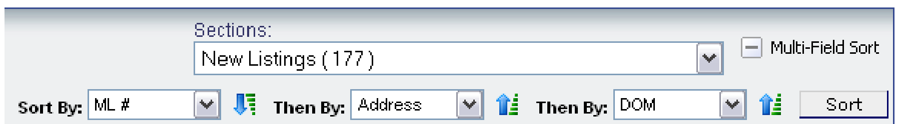
2. Click the same column header again to reverse the sort order.

Multi-Field Sorting

The multi-field sorting controls let you select up to three columns by which to sort the results, and you may specify either an ascending or descending sort direction for each.

To multi-sort a list by up to three columns:

1. Click the **Multi-Field Sort** button [ ] to expand the section.



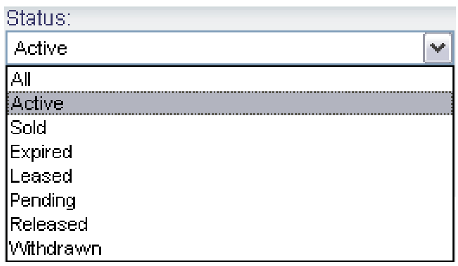
2. Define the first column sort by clicking the **Sort By** arrow and selecting a column header, for example **ML#**.

3. Click the **Sort Ascending/Descending** button [ ] next to the **Sort By** field to choose a sort direction, where:
   - a descending sort lists from Z to A and 9 to 0; and
   - an ascending sort lists from A to Z and 0 to 9.
4. Define the second column sort by clicking the **Then By** arrow and selecting a column header, for example **Address**.
5. Click the button next to the **Then By** field to choose either an ascending or descending sort direction.
6. Define the third column sort by clicking the second **Then By** arrow and selecting a column header, for example **DOM**.
7. Click the button next to the **Then By** field to choose either an ascending or descending sort direction.
8. Click the **Sort** button.
9. Click the **Multi-Field Sort** button [ ] to collapse the section.

Filtering the Search Results List

You can narrow your search by applying a simple filter or by applying several filters (together or independently). In this way you can reduce the number of search results.

Filters are applied by using a drop-down list and selecting one value. All records with that value are displayed, while the others are hidden from view.



To apply a simple filter to a list of records:

1. From a list of search results, click the first drop-down list (**Status**, as an example) and choose one of the status types: **Active**, **Sold**, **Expired**, etc.

   Only those records with the specified status will be displayed.

2. From the same list, click **All** to remove the filter and display the entire list.

To apply multiple filters to a list of records:

1. From a list of search results (in Contact Manager, for example), click the **Contact Type** drop-down list, and select **Buyer**.

   The list is reduced to display “Buyer” records.

2. Next, click the **Status** drop-down list and choose **New**.

   The list is further narrowed to display only those “Buyer” records that are “New.”

3. Finally, click the **Filter** drop-down list and select **Show selected**.

   The list is further narrowed to display only those “Buyer” records that are “New” and “Selected.”

To return to an unfiltered Contact list display:

- Click the **Contact Type**, **Status**, and **Filter** arrows and select **All**.

  The full list is once again displayed.

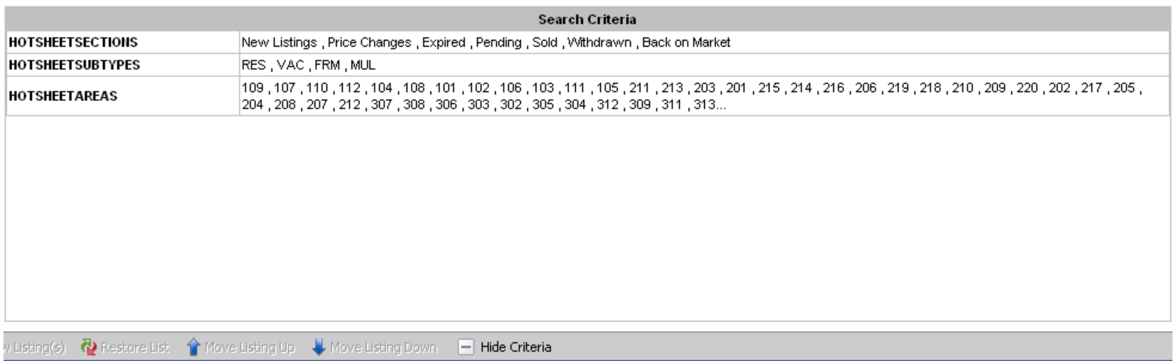
Showing/Hiding Criteria

The footer bar contains the **Show Criteria** button, which enables you to see an overview of the search criteria used to retrieve the current search results. Similarly, the **Hide Criteria** button lets you close the Search Criteria pane.

To display an overview of the current search criteria:

1. From the footer bar, click the **Show Criteria** button.

   A preview pane opens in the bottom half of the Search Results tabbed page.



Search Criteria	
HOTSHEETSECTIONS	New Listings , Price Changes , Expired , Pending , Sold , Withdrawn , Back on Market
HOTSHEETSUBTYPES	RES , VAC , FRM , MUL
HOTSHEETAREAS	109 , 107 , 110 , 112 , 104 , 108 , 101 , 102 , 106 , 103 , 111 , 105 , 211 , 213 , 203 , 201 , 215 , 214 , 216 , 206 , 219 , 218 , 210 , 209 , 220 , 202 , 217 , 205 , 204 , 208 , 207 , 212 , 307 , 308 , 306 , 303 , 302 , 305 , 304 , 312 , 309 , 311 , 313...

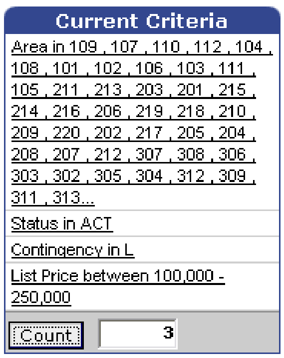
2. Click the **Hide Criteria** button in the footer bar to close the preview pane.

Task Related Controls

Once you have selected one or more records to work with, there are buttons, menu items, and tools available for you to take action or perform a task. For example, once you have searched for and selected several listings, you may want to print or e-mail the information.

Results Counter

As you enter multiple search criteria in the fields of a search form, the **Current Criteria** box, available on the left side of the page, keeps track and lists all criteria.



To use the Count feature:

1. Once you have specified search criteria for all required fields on the search form, and they are reflected in the **Current Criteria** box, click the **Count** button.

   The number of matching records is calculated and displayed in the field.

2. If the number is extremely large, adjust your search criteria to reduce the number of matching records before clicking the **Search** button to retrieve the records.

NOTE! *TEMPO 5 can display only 1,000 matching records. If the count, based on your current criteria, is over 1,000 and you click the **Search** button, a warning message appears prompting you adjust your search criteria to reduce the number of matching records.*

Selecting / De-selecting Records

Before you can perform certain actions on a record, you must select it. For example, you may want to send an e-mail to a contact after performing a search.

To select/de-select one or more records:

1. Select the check box of the record.

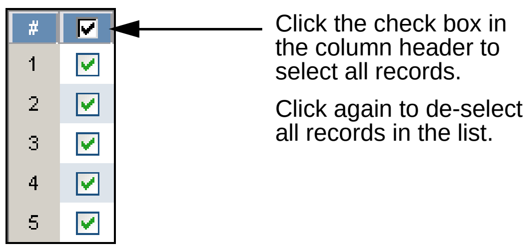
   A check mark appears indicating the record is selected.

2. Clear the check box.

   The check mark is removed, indicating the record is no longer selected.

To select/de-select the entire list of records:

1. Select the check box in the column header to choose all records.

   Now you can click a button, for example, **Print** to work with selected records.

2. Clear the check box in the column header to de-select all records.

Quick Access Menu

The Quick Access menu is available for each record in a Search Results list. It enables you to perform additional actions for a selected record.

NOTE! *The following list of Quick Access menu options may not include all possible features, depending on your area and third-party vendors, etc.*

To display the Quick Access menu:

1. Using the mouse, point to the **Information** button [ ] of a specific record in the list.

   The **Quick Access** menu appears.

2. Click the appropriate button.

Edit — revise a selected record's information.

E-mail — send an e-mail message with a link to recommended properties to interested contacts.

Print — print contact lists, reports and labels.

Delete — permanently delete a record and all associated information.

Report — generate listings reports, business reports and more.

Property History— view the selected listing's MLS property history.

Images — view media for the selected property.

Map — shows the selected property's location on a map.

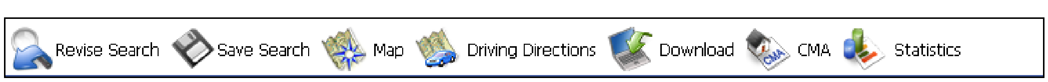
Notes — recommend (or reject) a listing and associate it with any accompanying notes to a contact record.

Financial Calculators — access a payment calculator to determine payments and manage your buyer and seller netsheets.

Charts — produce a colorful chart of MLS data.

Action Buttons

Action buttons are controls found below (and sometimes above) the main pages throughout TEMPO 5 enabling you to perform additional tasks to one or more selected records on a page.

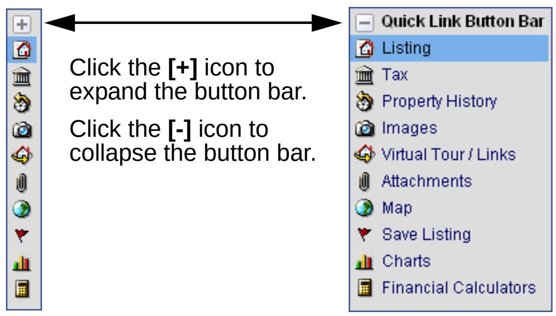


To execute an action:

1. Select one or more records in a list, such as the Search Results page.
2. Click a button to perform an action, such as **Map** to show a property's location on a map.

Quick Link Button Bar

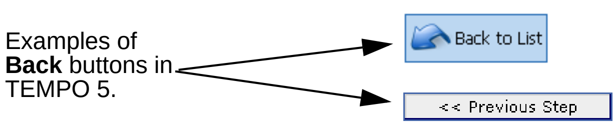
The **Quick Link** button bar is available on the left side of the Search Details page. By default, the **Listing** link will be selected.



It enables you to quickly access different aspects of the selected property record. For example, click the appropriate buttons to view **Property History**, **Images**, **Virtual Tours**, **Attachments** and more.

Going Back

When you want to return to a previous page, use TEMPO 5's built-in controls to navigate instead of the browser's **Back** button. Using the browser's button may cause TEMPO 5 to respond unpredictably.



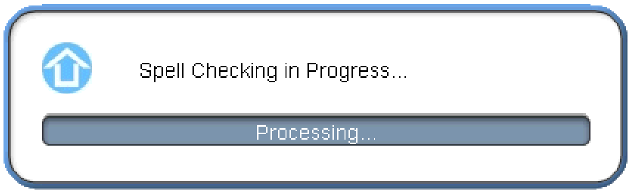
Spell Check

There are several places in TEMPO 5 to type free form text: e-mail messages, contact descriptions, or notes. Use the **Spell Check** tool to correct spelling errors. It functions like most spell checker tools found in other applications.

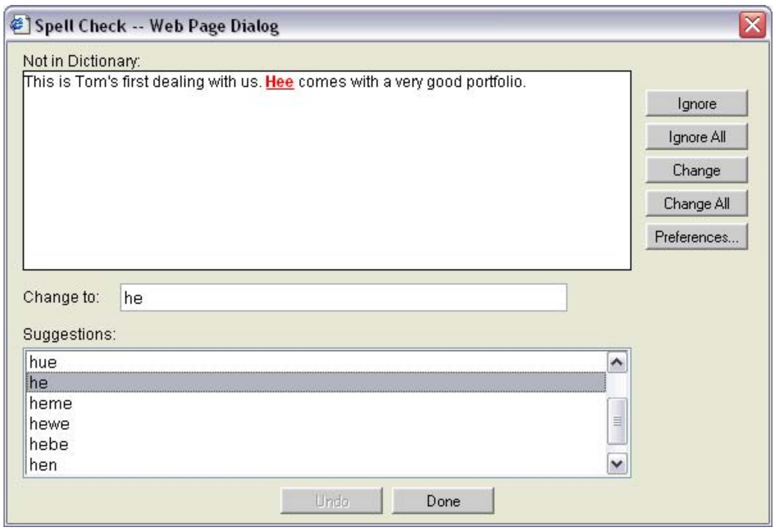
To use the Spell Check tool:

1. Click the **Spell Check** button located next to a text field.

The following Progress message appears.



2. If spelling errors are detected, the Spell Check dialog box displays the text in red font and offers possible suggestions.



3. Use the buttons to perform further tasks:
   - **Ignore** — click to leave this instance of the word "as is."
   - **Ignore All** — click to leave all instances of the same word "as is."
   - **Change** — highlight a suggested correction in the list box, then click this button to replace this instance of the word.
   - **Change All** — highlight a suggested correction in the list box, then click this button to replace all instances of the word.
   - **Preferences** — click to display the Spell Check Preferences dialog box. Specify the following spell checking options: **Ignore words in ALL CAPITALS** or **Ignore words with digits in them**. Currently English is the only language available.
   - **Undo** — click to revert back to the original spelling of one or more words you changed.
4. Click **Done** to close the dialog box.

Changing Your Settings

Personalizing Settings for the Way You Work

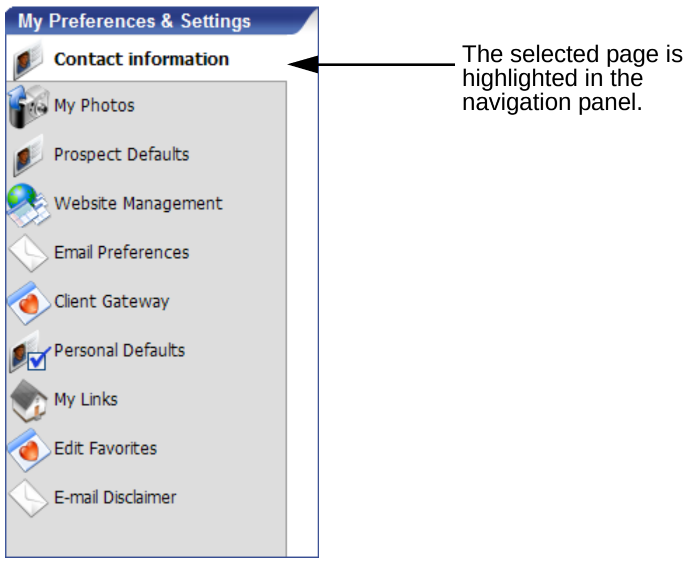
With TEMPO 5, you can customize a wide range of program settings, including your contact information, favorite reports, e-mail preferences, default search templates, Home page resource links and more.

To access Preferences and Settings:

1. From the main menu bar, click **My Tools** > **Preferences**.

   The My Preferences & Settings page opens.

2. Click the desired item in the left navigation panel.



   The corresponding page opens.

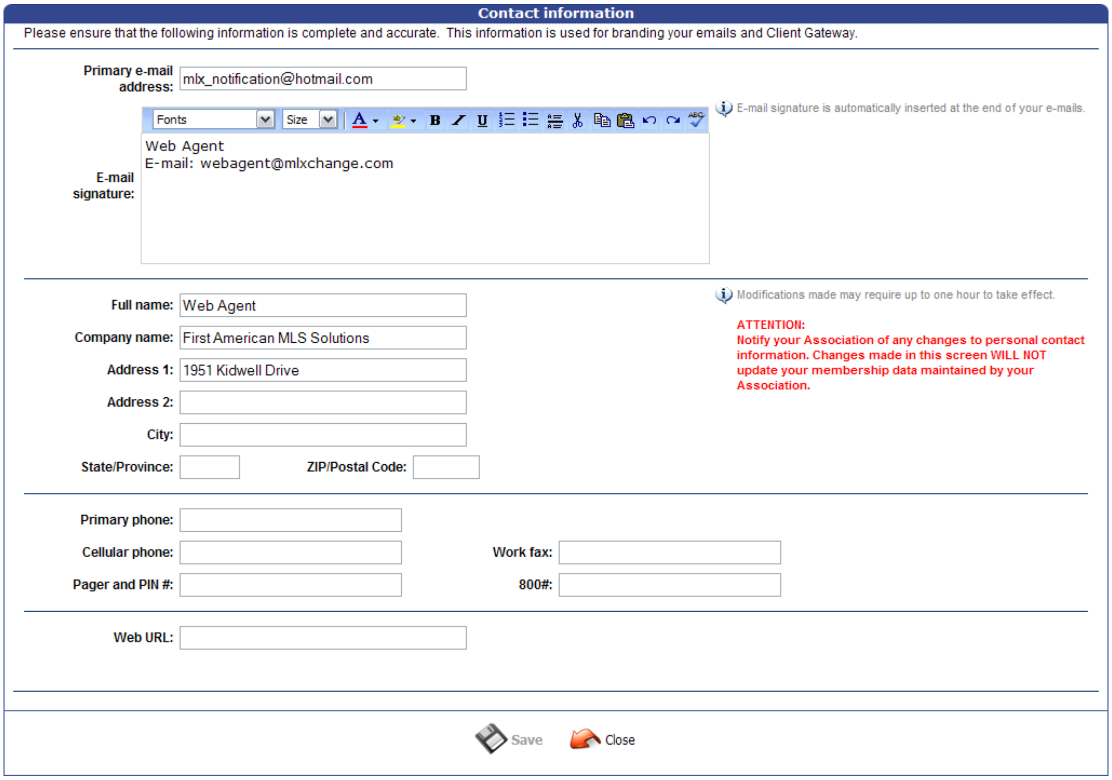
Updating Your Contact Information

Your personal contact information is stored within TEMPO 5 and is used throughout the program. For example, your information is automatically inserted into the header or footer of many listing reports, and your e-mail signature is automatically inserted at the end of your e-mail messages.

To access and change your contact information:

1. In the **My Preferences & Settings** navigation panel, click **Contact information** (it should be selected by default).

The Contact Information page opens.



2. Make the necessary changes or additions to your contact information using the fields provided.
3. Click **Save**.

   Note: Changes made to your contact information on this page will NOT update your membership data maintained by your MLS.

My Photos

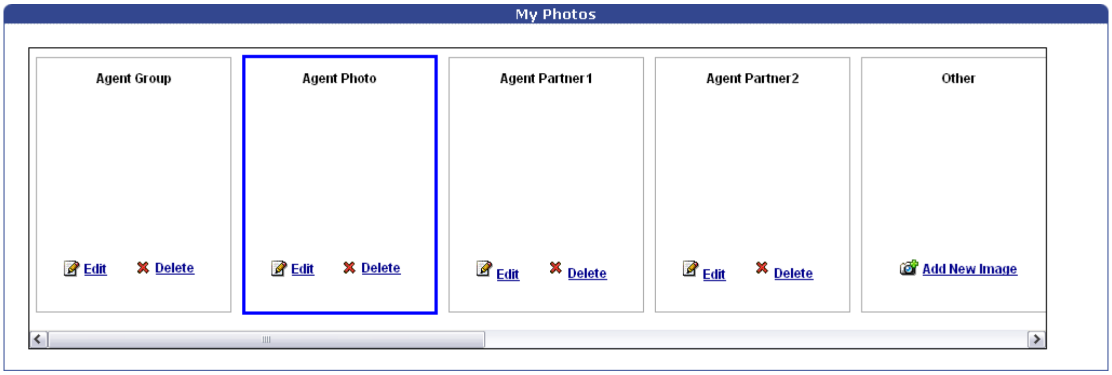
Use this area to select and load various Agent-related images into a library that you can use in custom reports and communications. From Agent Photo to CMA letterhead pictures, TEMPO 5 has a list of image frames to use.

NOTE! *Images should be in .JPG or .BMP format.*

To add an Agent type image:

1. In the **My Preferences & Settings** navigation panel, click **My Photos**.

The My Photos page opens to a series of frames.



2. Click an image frame that describes the type of image you want to add. For example, Agent Partner 1, Agent CMA Image, Agent CMA Letterhead, etc.

   Note: Use the scroll bar to display the rest of the frames.

   A blue outline appears around the selected frame.

3. Click the **Add New Image** link inside the frame.

   The Edit Image dialog box opens.

4. Type the name of the image file in the **File Name** text box; or click the **Browse** button to navigate and select the image file you want to add, and click **Open**.

   A preview of the image is displayed in the frame.

NOTE! *If you can't see the image, you may need to add the Web site's URL to the **Trusted sites** zone in Internet Explorer. Click the **Can't see the image?** link provided and follow the on-screen instructions.*

5. Change the image size by dragging the **Zoom** slider; or by clicking the **Zoom in** [ ] button to enlarge the image, or by clicking the **Zoom out** [ ] button to reduce the image.

6. Click **Save**.

To edit an Agent type image:

1. In the My Photos page, click the **Edit** link inside an image frame.

   The Edit Image dialog box opens.

2. Make the necessary modifications. Follow steps 4 and 5 of the adding an image procedure. See *"To add an Agent type image:" on page 35*.

3. Click **Save**.

To permanently delete an Agent type image:

1. In the My Photos page, click the **Delete** link inside the frame of the unwanted image.

   A message box appears, prompting you to confirm the deletion.

2. Click **OK**.

   The image is deleted from TEMPO 5, but NOT from your computer.

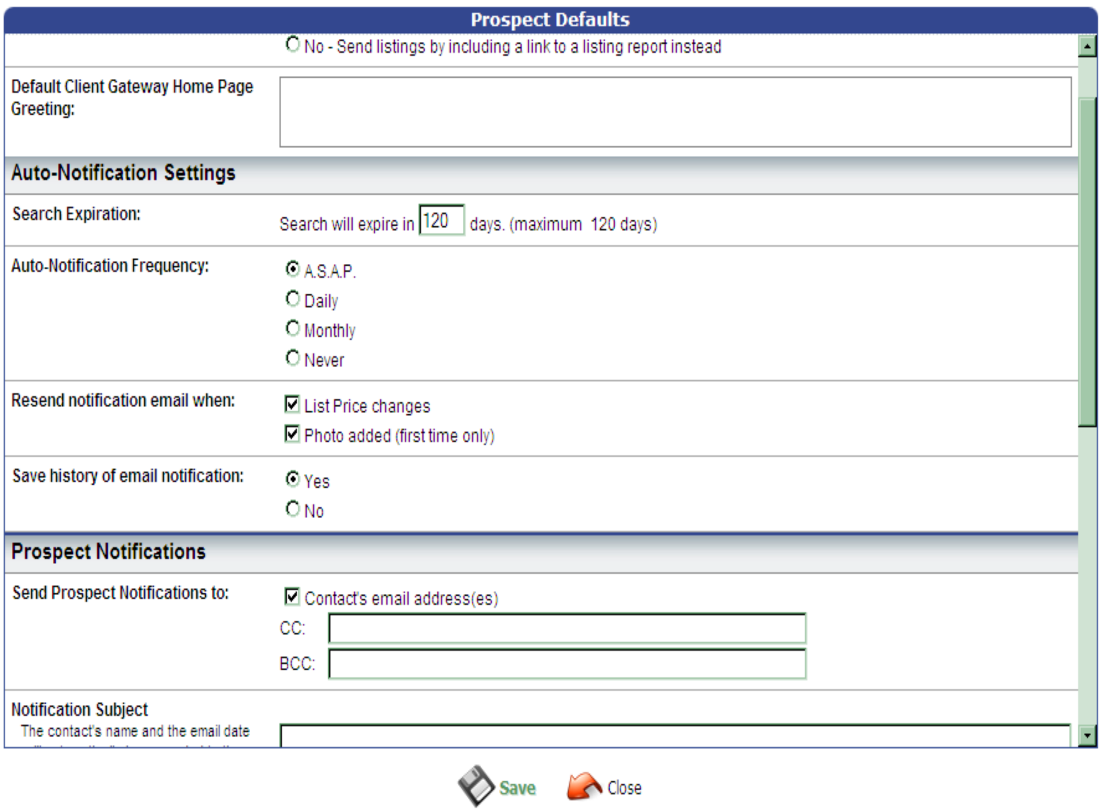
Prospect Defaults

Use this area to specify the default settings for the client gateway, auto-notifications, prospect and agent notifications. See *"Modifying Search & Notification Settings" on page 94*See: *"Modifying Search & Notification Settings"*.

To specify your prospecting defaults:

1. In the **My Preferences & Settings** navigation panel, click **Prospect Defaults**.

   The Prospect Defaults page opens.



2. In the **Client Gateway Settings** section:
   - determine if you want to use the client gateway for prospects by clicking either the **Yes** or **No** option button. If yes, all listings will be displayed in a personalized and branded web site. If no, a link to the listings report will be sent via e-mail.
   - type a personalized message in the **Default Client Gateway Home Page Greeting** text box.
3. In the **Auto-Notification Settings** section, specify the following:
   - **Use Auto-Notification** — select either the **Yes** or **No** option.
   - **Auto-Notification Expiration** — enter the number of days (up to a maximum of 180) in which e-mail auto-notification will expire. After this time, no more e-mail notifications will be sent.

- **Auto-Notification Frequency** — select how often you want the notification e-mails to be sent: **ASAP**, **Daily**, **Monthly,** or **Never**. Daily and monthly frequencies have **Repeat** sub-options. If you select **Never**, searches will still run, but no notifications will be sent.
- **Resend notification email when** — select one or both check boxes: **List price changes**, **Photo added**. An email notification will be resent upon the selected conditions being met.
- **Save history of email notification** — select either the **Yes** or **No** option.
- **Allow Reverse Prospecting** — select either the **Yes** or **No** option. See *"Reverse Prospecting" on page 109*.

Note: Allow Reverse Prospecting options are displayed only if the feature is enabled at the site level.

4. In the **Prospect Notifications** section specify the following:
   - **Send Prospect Notifications to** — select the **Contact's email address(es)** check box to enable this feature. Add additional e-mail addresses in the **CC** and/or **BCC** fields.
   - **Notification Subject** — type a subject line for the e-mail notification. The contact's name and date will be appended to the subject line automatically.
   - **Notification Text** — modify the e-mail text message, using the toolbar to apply text attributes, such as bolding or italics. Do not remove the [Listing URL] merge code, as it will provide the contact with the necessary link to the listings.
5. In the **Agent Notifications** section, specify if you want to send an Agent notification and to which e-mail address by clicking one or both of the check boxes:
   - My Primary E-mail Address
   - My Pager or Cell Phone E-mail Address
6. Click **Save**.

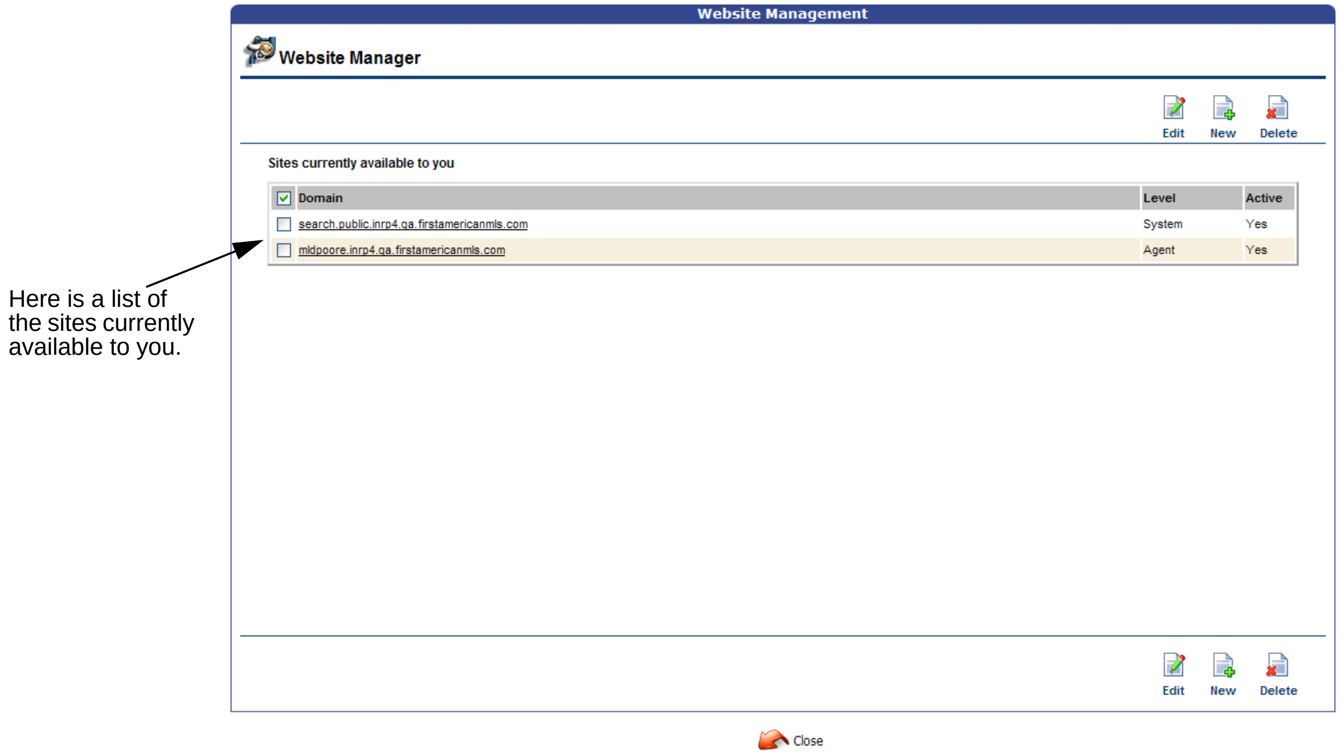
Website Management

Use this area to manage the web sites that are currently available. You can add, edit or delete available system, broker or agent web sites. For more information, see *"Creating a New Website" on page 238*See: *"Creating a New Website"*.

To view the websites currently available:

1. In the **My Preferences & Settings** navigation panel, click **Website Management**.

The Website Management page opens.



2. From this page, you can do the following:
   - click directly on a link in the **Domain** column, or select the check box then click the **Edit** icon. The Agent Website Configuration page opens, letting you manage the site. See *"Configuring an Agent or Broker Website" on page 241*.
   - select one or more links by clicking in the check box, then click the **Delete** icon.
   - click the **New** icon. See *"Creating a New Website" on page 238*See: *"Creating a New Website"*.
3. Click **Close**.

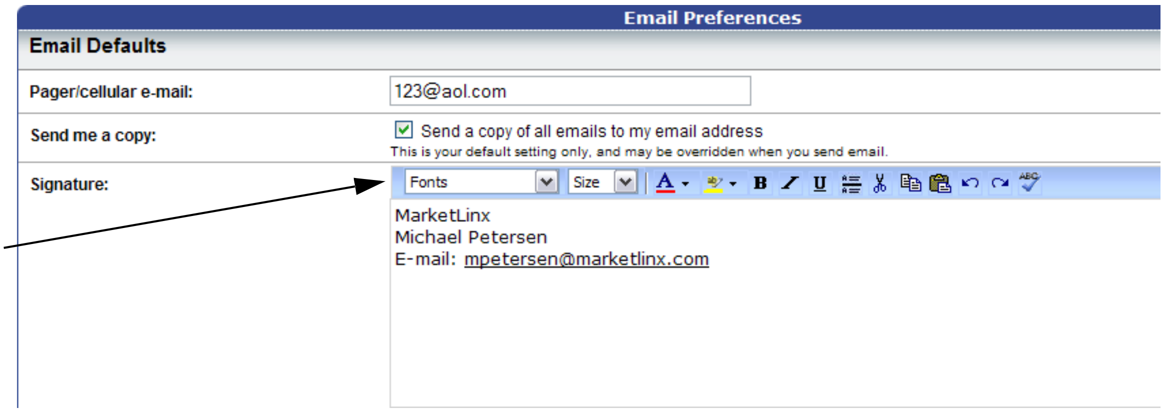
Setting E-mail Preferences

Use this page to enter your e-mail defaults, such as a pager or cellular phone e-mail address, e-mail signature and whether or not you want a copy of all e-mails sent to your e-mail address.

To specify your e-mail defaults:

1. In the **My Preferences & Settings** navigation panel, click **E-mail Preferences**.

The E-mail Preferences page opens.



Use the toolbar buttons to apply text attributes and more.

2. Complete the following:
   - **Pager/cellular e-mail** — enter your device's e-mail address.
   - **Send me a copy** — select the check box if you want to send a copy of all e-mails to your e-mail address.
   - **Signature** — enter a signature to be automatically appended to your outgoing e-mail messages.
   - use the toolbar icons to apply attributes to the text.
3. Click **Save**.

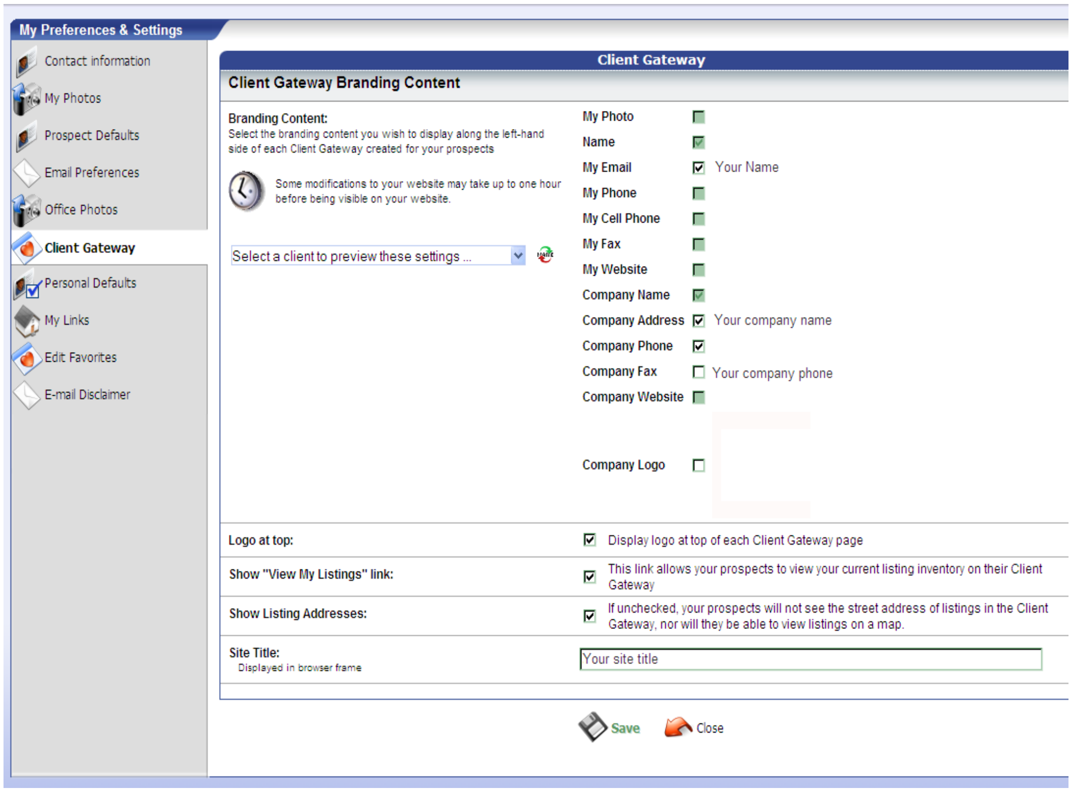
Client Gateway

Use the built-in features and controls in TEMPO 5 to easily set up and manage the appearance and content of your client gateways. A client gateway, used in conjunction with your own vanity domain, presents an opportunity to reach your target prospects. Using the client gateway, prospects can access properties that interest them, e-mail you, and check your Web site. See *"Setting Up Branding Preferences" on page 258*.

To specify branding content on your client gateway:

1. In the **My Preferences & Settings** navigation panel, click **Client Gateway**.

The Client Gateway page opens.



NOTE! *The clock icon indicates that any changes made to your Web site may take up to one hour before taking effect.*

2. Select the check boxes of the name and contact elements you want included, such as **My Photo**, **My Email**, **Company Logo**, etc.

   Note: If a field has not been completed on the Contact Information page, the information is not available for inclusion on the Client Gateway. For example, ***My Fax*** *is unavailable because no fax number has been specified on the Contact Information page.*

3. Select the **Logo at top** check box to display your logo at the top of each Client Gateway page.
4. Select the **Show “View My Listings” link** check box to enable your prospects to view your current listings inventory on the Client Gateway.
5. Select the **Show Listing Addresses** check box to display the street addresses of listings in the client gateway and to enable them to view listings on a map.
6. Enter a title for your Client Gateway site in the **Site Title** text box.
7. Click **Save**.

To preview the Client Gateway settings:

1. Click the drop-down list (just under the clock symbol) and select the name of a prospect. .You can toggle how the client list is sorted (by first or last name) by clicking the resort name button [].

   The Web site opens in a new browser window
2. Check to see how the links work and how the page will appear to a client.

Changing Personal Defaults

The Personal Defaults page lets you change a number of default settings. Choose a start-up page other than Home to display when you log in. Change the default search template, grid layout and view settings for each search type in a group (or database of information). Set up a default search type for the Listing Manager.

To access the personal default settings:

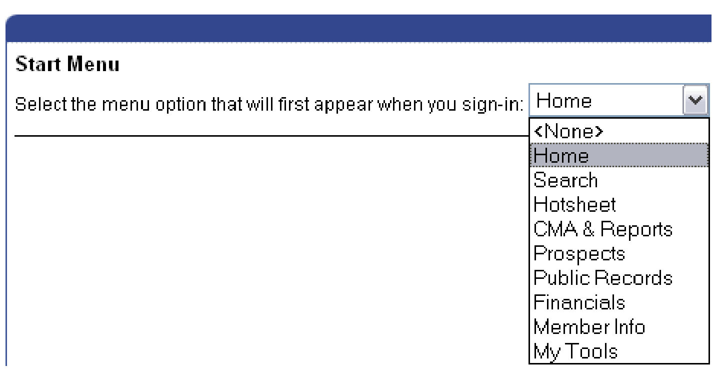
1. In the **My Preferences & Settings** navigation panel, click, **Personal Defaults**.

Choosing a Start-Up Page

While most people prefer to begin at the Home page, you have the option of going directly to one of several other pages when you log in to TEMPO 5. For example, you may prefer to go to the main Search Criteria page when you launch the program.

To change your start-up page:

1. In the **Start Menu** section of the Personal Defaults page, click the drop-down menu and select the option that you want to appear when you first log in to TEMPO 5.



2. Click **Save**.

   You will now automatically go to this selected page every time you log in.

Choosing an Image View

You can select the type of image you want to see by default: **Slideshow** or **Photo Gallery**. See *"Viewing Images and Virtual Tours" on page 79*.

To change the default image view:

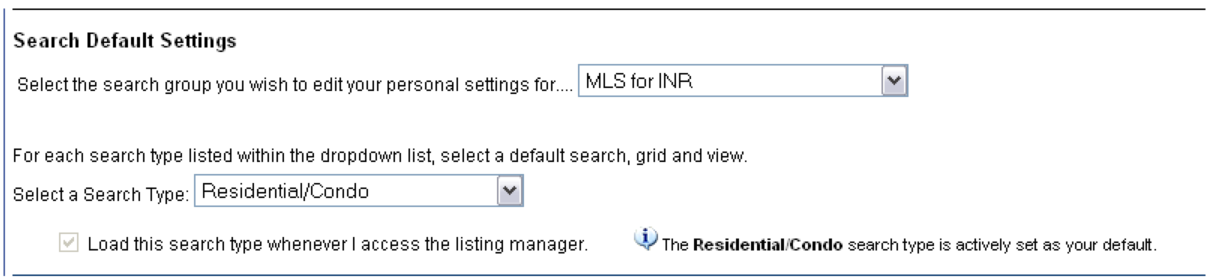
1. In the **Image View** section of the Personal Defaults page, click the drop-down list and choose an option.
2. Click **Save**.

Choosing a Listing Manager Search Type Default

You can designate one of the available search types to be the default whenever you open Listing Manager. For example, you may want the **Residential** grid to load when you open the Listing Manager.

To change the default search type for Listing Manager:

1. In the **Search Default Settings** section of the Personal Defaults page, select a search group from the drop-down list.



   For example, a search group can be the MLS database or the Tax database. Each search group contains multiple search types, which will be available in the second drop-down list.

2. Click the **Search Type** drop-down arrow and choose the search type you want as the default. For example, select **Residential/Condo**.
3. Select the **Load this search type whenever I access the listing manager** check box.

   The text tells you which search type is currently selected as your default.

4. Click **Save**.

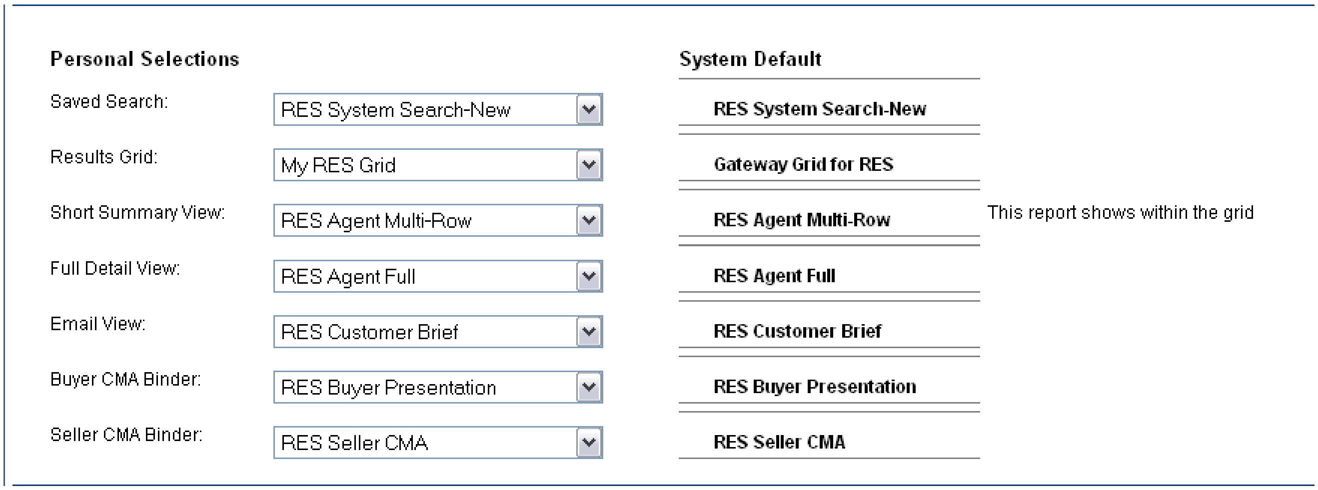
Personalizing the Search Grid Defaults

TEMPO 5 has a number of System grids and reports that are used to display information whenever you perform a specific type of search. However, you can design your own Personal search templates and use them as the default grid views for each of the various search types. See *"Searching" on page 63*.

Note: The names of the current System default reports applied to the various search types is displayed in the System Default list.

To select Personal search templates for a Search Type:

1. In the **Personal Selections** section of the Personal Defaults page, click the drop-down arrow for each of the search type(s) you want to change.



2. Choose the saved search grid or report layout you want loaded when you display a search results grid. It can be a standard System report or a Personal report you designed.
3. Click **Save** to apply the changes.
   - click **Reset** to restore all of the system defaults for all search types in the group.
4. Choose a different **Search Type** and specify your Personal Selections from each of the drop-down lists.
5. When you have finished choosing your personal selections, click **Save** to apply the changes.

Example:

For a **Residential** Search Type, a few of the System Defaults are:

Saved Search — RES Simple Search

Results Grid — RES Standard Grid

Short Summary View — 18 SFR Multiple-Row

To change the templates that are used in these search instances, click each of the drop-down arrows and choose another template. It may look like this:

Saved Search — RES Standard Search.

Results Grid — My Modified Standard Grid

Short Summary View — SFR Multi-Row with MAP

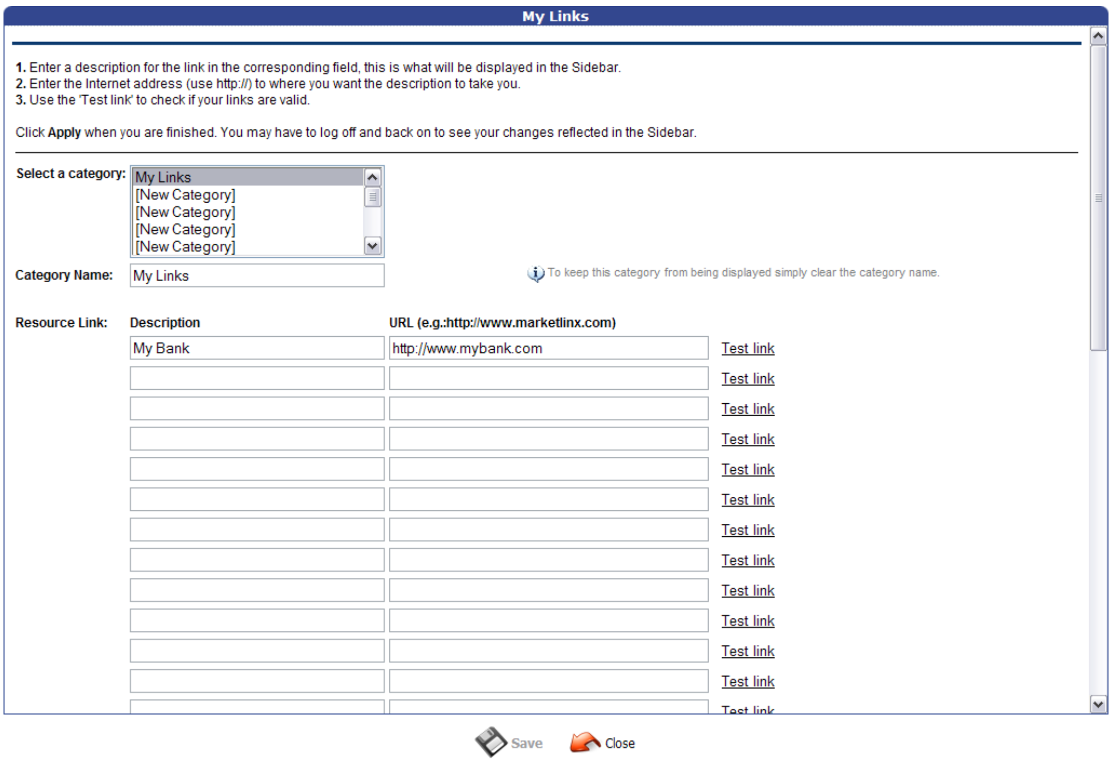
Personalizing Home Page Resource Links

TEMPO 5 lets you set up links on your Home page so you can quickly access your favorite Web sites. See *"My Sidebar" on page 8*.

To add a new resource link to the Home page:

1. In the **My Preferences & Settings** navigation bar, click **My Links**.

   The My Links page opens.



NOTE! *Initially, the category list will be empty.*

2. To add a new category name to the list, type in the **Category Name** field, then click **Save**.

   The new name appears in the list.

3. To add links to a specific category, highlight the category in the list.

NOTE! *Categories allow you to organize your links into groups on the Home page. For example, you might create one category for business-related links, and another for personal links.*

4. In the **Resource Link** section, enter the descriptive text you want to appear on the Home page in a blank **Description** field.

5. Complete the **URL** field (Web site address) using the example for proper format (including http:// or https://).

6. Click **Test Link** to the right of the new link.

   A new browser window opens, launching the Web site. If this does not happen, check to make sure that the URL is correct.

7. Click **Save** to apply your changes.
8. Return to the Home page and view your new resource links from **My Sidebar**.
   - click the category name to expand the section and show the individual links that it contains.

To modify an existing resource link on the Home page:

1. In the **Select a category** list on the My Links page, click the name you want to modify.

   It appears in the **Category Name** field.

2. Type over the existing name, replacing it with a new name, then click **Save**.

   The new name appears in the category list.

3. Follow steps 4 through 7 above.
4. Return to the Home page and view your new resource links from **My Sidebar**.
   - click the category name to expand the section and show the individual links that it contains.

To hide a resource link from the Home page:

1. From the **Select a category** list on the My Links page, click the name you want to remove.

   It appears in the **Category Name** field.

2. Delete the text in the **Category Name** field, leaving it blank.

   Note: You do not have to remove the corresponding Web addresses. You may want to restore the category to the Home page at a later date.

   A message box appears asking if you want to hide the category.

3. Click **OK**.

   The **Category Name** field shows **[Hidden]**.

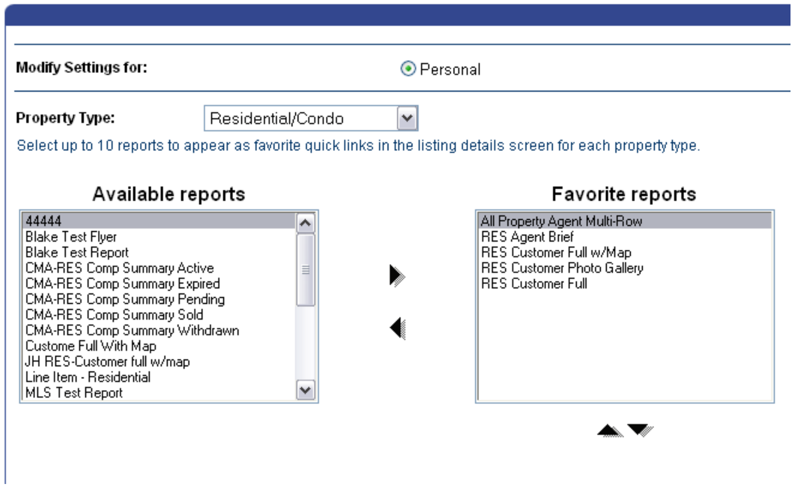
Choosing Your Favorite Reports

To make it easy to quickly view your favorite reports on the Listing Detail page, as quick links, TEMPO 5 lets you maintain a list of the reports you use most often. A different list of favorite reports can be set up for each property type. See *"Working with the Report Manager" on page 176*.

To set up a list of your favorite reports:

1. In the **My Preferences & Settings** navigation bar, click **Edit Favorites**.

The Favorite Reports page opens.



2. In the **Property Type** drop-down list, choose a property type for which you want to create a list of favorite reports.

   All available reports for the selected property type are displayed in the list.

3. Select up to six reports from the **Available reports** list.

   - to select multiple items in the list, hold down the CTRL key and click.

4. Click the right arrow [>] button to move your selected reports to the **Favorite reports** list.

   - to remove a favorite report, select the unwanted report from the **Favorite reports** list and click the left [<] arrow button.

5. Click the up and down arrow buttons to re-order the items in the list.

   Note: The order of the reports determines the order in which they will be displayed on the Listing Detail page.

6. Repeat steps 3 through 5 for each property type.

7. Click **Save**.

   Your favorite reports will be highlighted in yellow to distinguish them from other reports in the list.

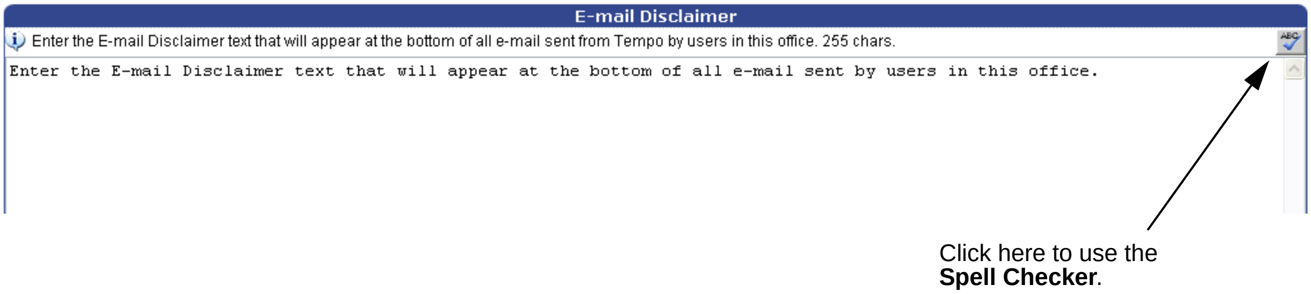
Entering an E-mail Disclaimer

Use this text box to enter a disclaimer message that will appear at the bottom of all e-mails sent from TEMPO 5 by users in your office.

To set up an E-mail disclaimer:

1. From the My Preferences & Settings page side bar, click **E-mail Disclaimer**.

The E-mail Disclaimer page opens.



2. Type up to 255 characters in the text box.
3. Click the **Spell Check** icon (located in the upper right corner of the page) to check the spelling. See *"Spell Check" on page 30*.
4. Click **Save**.

Contact Manager

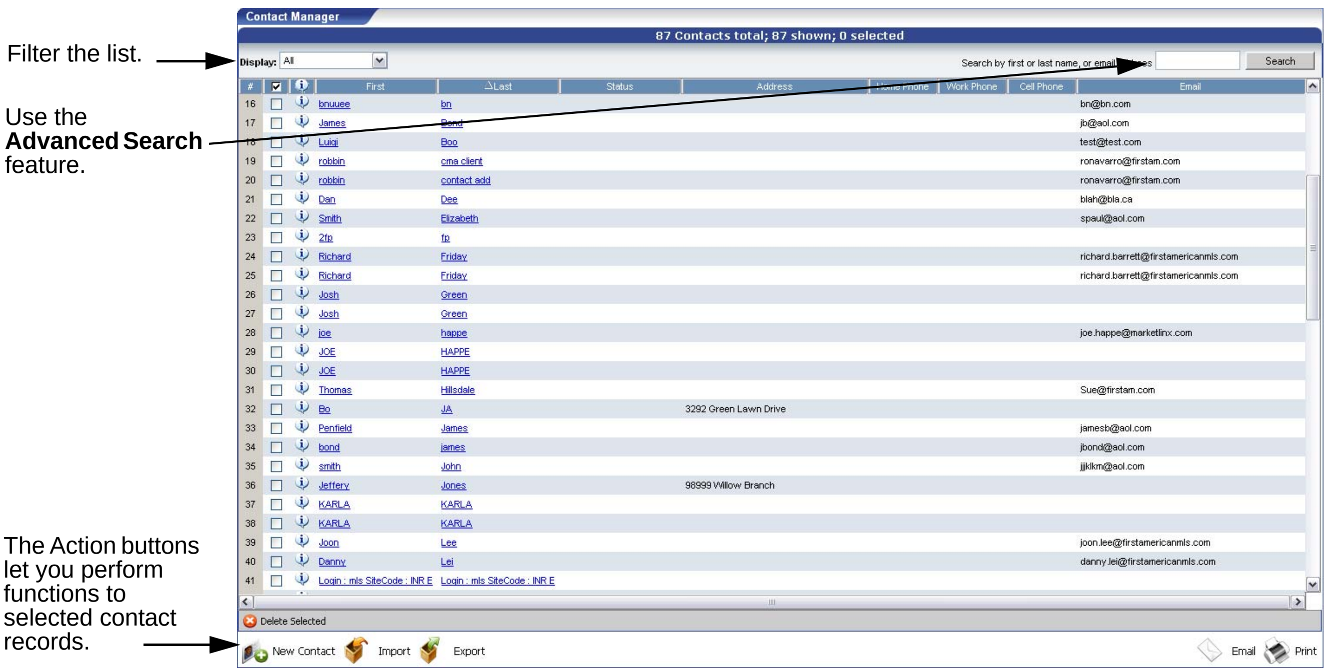
Working with the Contact Manager List

The Contact Manager is a powerful tool for working with contact records. When you open the Contact Manager, a list of all records currently in your database is displayed. Each column gives you an overview of contact details which you can sort, reorder, filter and print. Select one or more records in the list then use the action buttons to perform a task.

To display the Contact Manager:

- From the TEMPO 5 main menu, click **Prospects > Contact Manager**.

  The Contact Manager page opens.



To change the Contact Manager list view:

1. From the Contact Manager page, you can change the list view by:
   - clicking on a row to see an expanded preview of the contact's details.
   - clicking a column header to sort the list in ascending or descending order. See *"Viewing, Sorting and Filtering" on page 22*.
2. Click the **Display** drop-down list and select a specific type, for example all **Buyer** records. The list of records is narrowed by applying this simple filter. See *"Viewing, Sorting and Filtering" on page 22*.
3. Using the mouse, point to the Information icon of a record to display the Quick Access menu commands: **Edit**, **E-mail**, **Print** or **Delete**.
4. Select one or more records, then:
   - click an action button: **New Contact, Import**, **Export**, **E-mail**, **Print**.

- click the **Delete Selected** button in the footer bar.

5. Click the **Print** button to print the list of records (as seen on the page).

   *Note: To print the actual record details, select **Print** from the Contact Record page. See "Printing Contact Information" on page 266.*

6. Click **New Contact** to add a new contact record. See *"Adding a New Contact" on page 58*.

7. To search for a contact, type the first name, last name, or e-mail address in the field located in the top right corner. Click the **Search** button. See "*"Searching the Contact List" on page 51*".

8. To view a record in more detail, click the name, which is a hyperlink, to open the record. See *"Viewing Contact Record Details" on page 60*.

Searching the Contact List

The Contact Manager page provides a quick and convenient ways to search for contacts.

To perform a quick search by name, in whole or in part:

1. From the Contact Manager page, type in the **Search by** field:
   - the first name and/or last name of the contact you want to find; or
   - the first letter of the contact's name; or

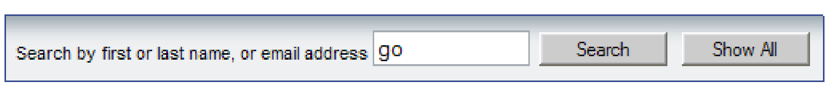
NOTE! *You can also search by entering the contact's email address or ID#.*

2. Click the **Search** button.

   The Contact list displays only those records that match the criteria; or those contacts whose first or last name begins with the letter of the alphabet you entered.

To display all contacts:

- Click the **Show All** button, which appears adjacent to the **Search** button once you've performed a search.



The Contact list displays all records.

NOTE! *To perform a more advanced search for Contacts, see "Creating More Advanced Search Queries" on page 68".*

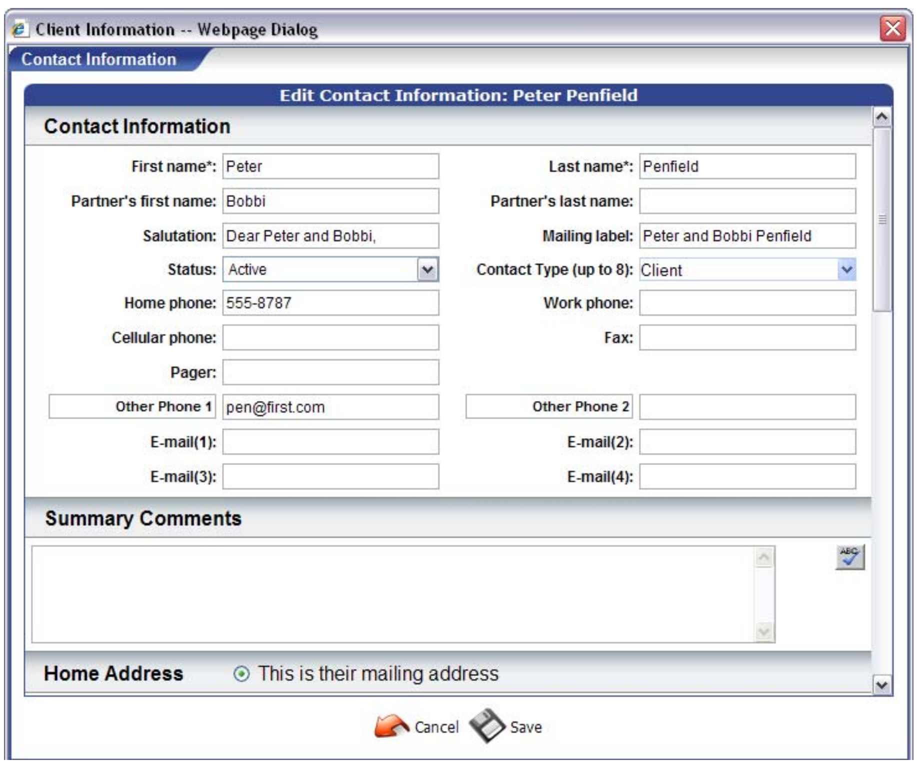
Editing Contact Information

You can edit only one record at a time from either the Contact Manager list page or from within the contact record itself.

To edit a contact record:

1. From the Contact Manager page, select a contact record you want to edit.
2. Using the mouse, point to the Information icon and select **Edit** from the Quick Access menu.

   The Edit Client Information [Client name] pop-up window opens.



3. Make the necessary changes using the same fields as described in another section. See *“Adding a New Contact” on page 58*.
4. Click **Save**.

   The contact record is updated.

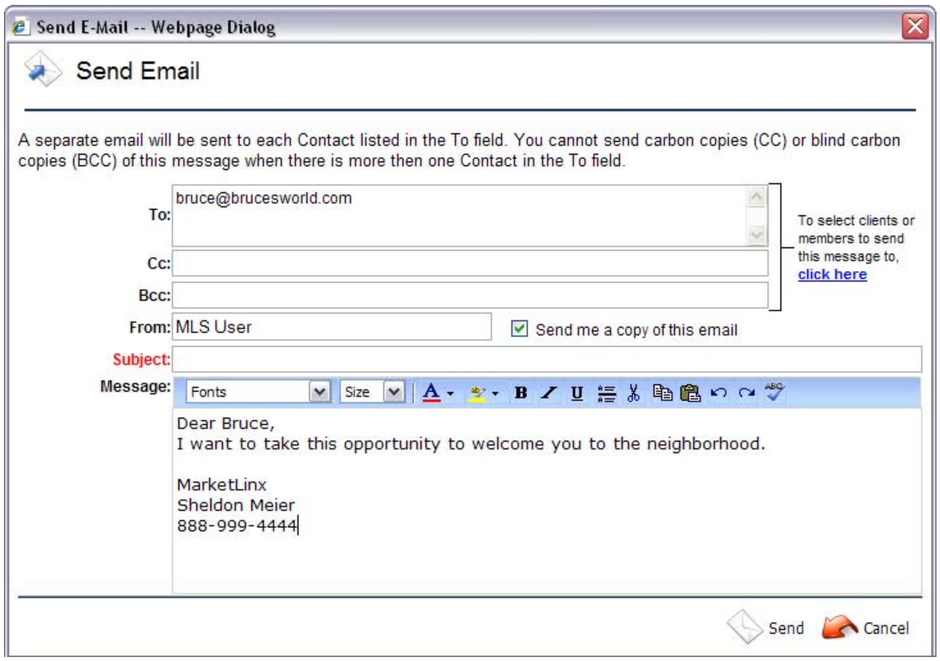
Sending E-mail to Contacts

You can send an e-mail message to any number of contacts and members.

To send an E-mail to a single contact:

1. From the Contact Manager page, select one contact from the list.
2. Using the mouse, point to the Information icon and select **E-mail** from the Quick Access menu.

   The Send E-Mail dialog opens.

3. Complete the **To**, **Cc**, and **Bcc** fields as necessary.

   *Note: The **To** field will already contain the email address of the selected recipient. The **From** field shows the sender's name.*

   - click the hyperlink on the right side to select additional recipients to receive this e-mail.

   *Note: If you have multiple recipients in the **To** field, you cannot use the **Cc** and **Bcc** fields.*

4. Select the **Send me a copy of this e-mail** check box to receive a copy of this e-mail.
5. Type a **Subject** line.
6. In the **Message** box, type a message, then click the **SpellCheck** icon to check for errors.
7. Use the E-mail rich text editor to add attributes to the text. See *"Sending E-mail" on page 130*.
8. Click **Send**.

To send an E-mail to multiple contacts:

1. From the Contact Manager page, select multiple contacts in the list.
2. Click the **E-mail** action button, located in the lower right corner of the page.

   The Send E-mail dialog opens showing the e-mail addresses of the selected contacts, separated by semi-colons.
3. Follow steps #3 - 8 above.

Printing Contact Information

The Print feature lets you print contact information in a variety of different formats, from contact lists to custom-designed reports and mailing labels.

To print a contact list:

1. From the Contact Manager page:
    - using the mouse, point to the Information icon and choose **Print** from the Quick Access menu; or
    - select one or more contact records from the list and click the **Print** Action button in the bottom right corner of the page.

    The Print dialog opens.
2. From the top section of the Print dialog, select one of the options: **Single Client**, **Selected Clients**, or **All Clients**.
3. Select the type of printout you want, for example **Clients Grid**, **Reports** or **Labels**.

    The corresponding print options, based on the selections in step #3, are displayed.
4. Choose the print options, and click **Preview**, **Save as PDF** or **Print**.

    Note: The Print feature is described in another section. See "Printing Contact Information" on page 266.

Deleting Contact Records

Select one or more unwanted contact records to delete from the database. Any CMAs associated with a contact, will also be deleted.

NOTE! *TEMPO 5 does not have a “Recycling Bin.” Deleted records are gone for good.*

To permanently delete a single contact record:

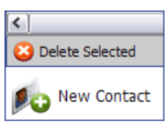
1. From the Contact Manager page, select one contact from the list.
2. Using the mouse, point to the Information icon and select **Delete** from the Quick Access menu.

   A message box prompts you to confirm the deletion. Take note of the information you are about to lose, such as saved searches and CMAs associated to the contact.
3. Click **OK**.

   The contact record and all related information is deleted.

To delete multiple contact records:

1. From the Contact Manager page, select multiple contacts in the list.
2. Click the **Delete Selected** button from the footer bar.

   A message box prompts you to confirm the deletions. Take note of the information you are about to lose.
3. Click **OK**.

   The contact records and all related information are deleted.

To delete an open Contact record:

1. From the Contact Manager page, click a contact’s name hyperlink to display the record details. See *“Viewing Contact Record Details” on page 60*.
2. From the **Contact Info** tab, click the **Delete Contact** Action button.

   A message box prompts you to confirm the deletion. Take note of the information you are about to lose, such as CMAs associated to the contact and saved searches.
3. Click **OK**.

   The contact record and all related information is deleted. You are returned to the Contact Manager list page.

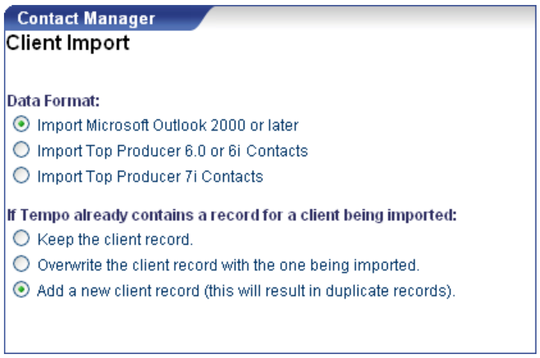
Importing and Exporting Contact Information

You can enter contact information manually, but you can also import contact information directly from other sources, such as Microsoft Outlook or Top Producer®.

To import contact information:

- From the Contact Manager page, click the **Import** Action button.

  The Client Import page opens.



Note: *This feature is described in another section. See* *"Importing Client Information" on page 328*.

To export client information:

- From the Contact Manager page, click the **Export** Action button.

  The Client Data Export page opens.

Note: *This feature is described in another section. See* *"Exporting Data from TEMPO 5" on page 330*.

Adding a New Contact

You can add a new contact record to the database from the Contact Manager or directly from the **Prospects** menu.

To add a new contact record:

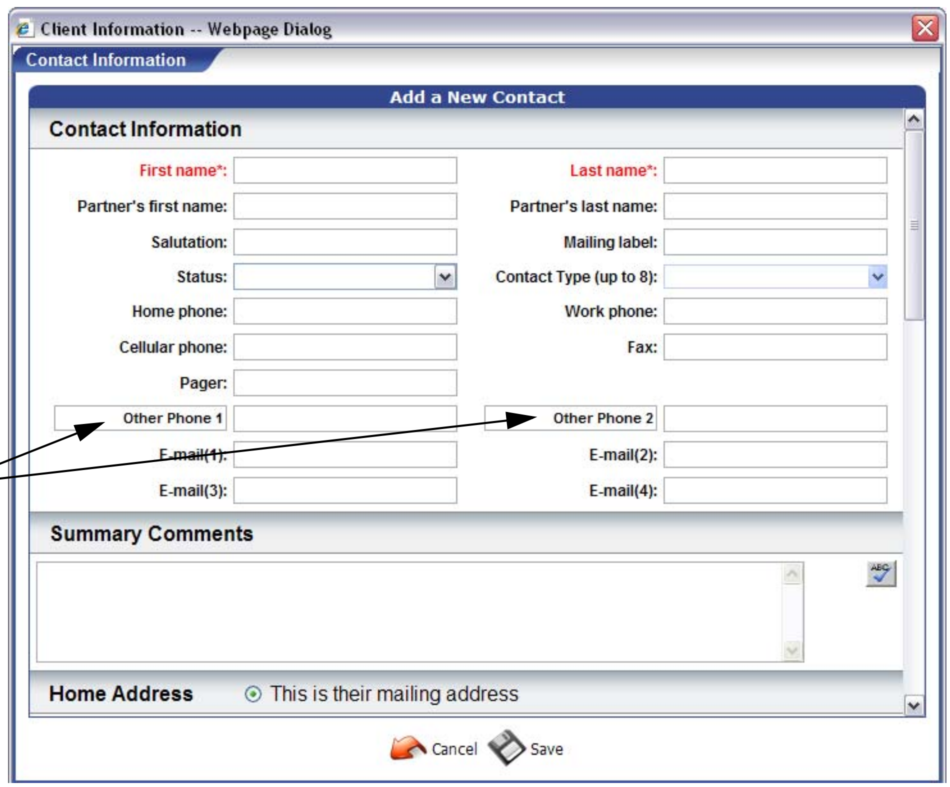
1. From the Contact Manager page, click the **New Contact** Action button; or from the main menu, click **Prospects > New Contact**.

   The Add a New Contact pop-up window opens.

   Note: You will need to scroll down to complete the entire record.

TIP ... Press TAB to move quickly to the next field.

You can label these 2 fields to whatever you want.



2. In the **Contact Information** section, enter all known information, including:
   - **First name/Last name** — these are required fields.

NOTE! *Required fields are marked with an asterisk (*) and must be completed. The field label appears in 'red' until completed, then it changes to 'black'.*

   - **Mailing label** — enter the first line of text for a mailing label, if different from the first and last name.
   - **Status** — click this drop-down list and select a category, such as **New** or **Active**. This field is used to categorize and sort your clients.
   - **Contact Type** — click this drop-down list to assign up to eight different contact types to a client record. This field is used to categorize and sort your contacts.

- Use the two fields with editable labels, **Other Phone 1** and **Other Phone 2**, to store custom information, such as additional phone numbers, Web addresses, etc.

NOTE! *You will need to scroll down, as there are many more fields available that are not shown in the screen shot.*

3. In the **Summary Comments** section, enter free-form text, then click the **SpellCheck** icon to find any potential spelling errors.
4. In the **Home/Work/Other Address** sections, enter all the address information for the contact. Click the **This is their mailing address** option button to indicate which of the multiple addresses should receive mail.
5. In the **Tracking Information** section, enter:
   - **Lead source/Source name** — click the drop-down list and select the source of the lead, then type the source's name in the text box.
   - **Contact ID** — assign an identification number by which you can track this client.
   - **Notes** — click **Add a Note** to prefix your comments with a date/time stamp. Enter free-form text, then click the **SpellCheck** icon to find any potential spelling errors.
6. In the **Contact's Preferences** section, enter:
   - property information including price range, number of bedrooms, number of bathrooms, square footage, what they are interested in and MLS number.
7. In the **Contact's Personal Information** section:
   - enter birthday information, children's names, anniversary dates.

   Note: The date fields all have a pop-up calendar window, from which you can quickly select a day, month, and year.
8. Click **Save**.

   The contact's name now appears in the Contact Manager list.

Viewing Contact Record Details

The contact record provides a consolidated view of a selected client's contact information, search and e-mail history, CMAs, property lists, private searches, netsheets and client gateway information.

To see a preview of a client's contact information only:

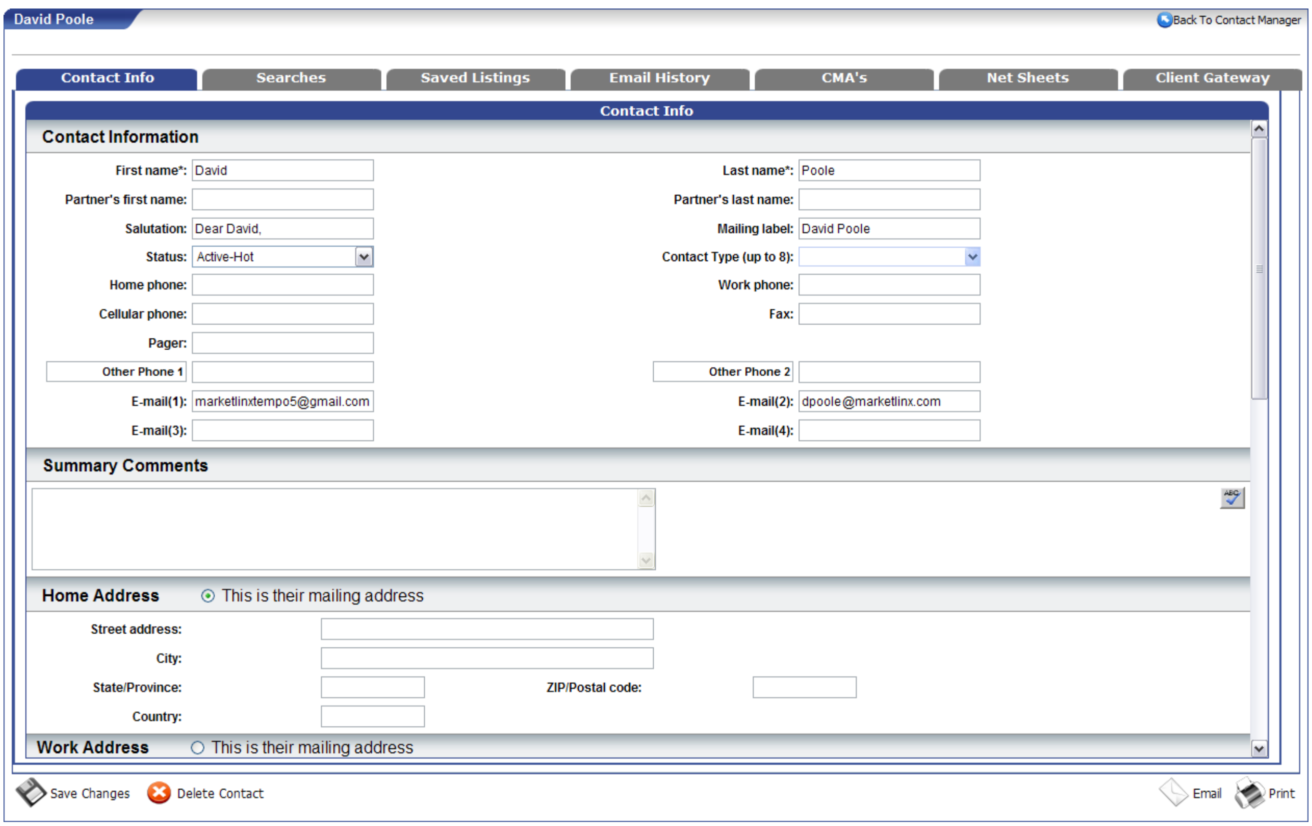
- From the Contact Manager page, click a record item in the list.

  The line item opens to display a brief summary of contact information, such as address, phone numbers, e-mail addresses, etc.

To view a client's detailed information:

1. From the Contact Manager page, click a client's name (hyperlink) in the list.

   The contact record (with the client's name displayed) page opens.



2. Click a tab for the type of information you want to access: **Contact Info**, **Searches**, **Saved Listings**, **E-mail History**, **CMAs**, **Netsheets**, or **Client Gateway**.

   *Note: The **Contact Info** tab is selected by default.*

3. Click the **Back to Contact Manager** button, located in the top right corner, to return to the Contact Manager list.

Contact Info

Click the **Contact Info** tab to see detailed client information, such as phone numbers, addresses, tracking information, preferences, etc. From the **Contact Info** tab, the following Action buttons are available:

- **Save Changes —** See *"Editing Contact Information" on page 52*.
- **Delete Contact** — Click this button to delete the contact record, along with all associated searches and CMAs. See *"Deleting Contact Records" on page 56*.
- **E-mail** — See *"Sending E-mail to Contacts" on page 53*.
- **Print** — See *"Printing Contact Information" on page 266*.

Searches

The **Searches** tab displays a list of all prospecting searches associated with the contact. See *"Working with the Prospect Manager" on page 87*.

You can see a summary of information for each saved search, such as search name and description, auto-notification expiry date, etc. From the **Searches** tab, the following buttons are available:

- **Check All** — Located on the footer bar, click this button to select all items in the list. The button changes to **Uncheck All**, which lets you clear all check boxes.
- **Delete Search** — Located on the footer bar, click this button after selecting one or more unwanted searches in the list.
- **Add New Search** — See *"Using the Search Criteria Page" on page 68*.
- **View Search Results** — See *"Working with the Search Results Page" on page 75*.
- **Edit Search Criteria** — See *"Using the Search Criteria Page" on page 68*.
- **Search And Notification Settings** — See *"Using the Search Criteria Page" on page 68*.

Saved Listings

The **Saved Listings** tab displays a list of property searches attached to this client and rated according to interest. Filter the list by clicking the **Show Group** drop-down list and choosing a designated category: **All**, **Favorite**, **Recommend, Possibility** or **Reject**.

From the **Comments** column, the following links are available:

- **add new** — if the listing does not have any comments associated with it, click here to add a new note. See *"Property Notes and Ratings" on page 91*.
- **view/edit** — if the listing has an existing comment associated with it, click here to view or modify the saved note. See *"Property Notes and Ratings" on page 91*.

The following buttons are available:

- **Check All** — Located on the footer bar, click this button to select all items in the list. The button changes to **Uncheck All**, which lets you clear all check boxes.

- **Delete Selected** — Located on the footer bar, click this button after selecting one or more unwanted items in the list.
- **View Details —** See *"Viewing Listing Details" on page 78*.

E-mail History

Click the **E-mail History** tab to see a list of all outgoing e-mails associated with the contact. Click the **Subject** link of an item to read the e-mail message details.
The following buttons are available:

- **Check All** — Located on the footer bar, click this button to select all emails in the list. The button changes to **Uncheck All**, which lets you clear all check boxes.
- **Delete Selected** — Located on the footer bar, click this button after selecting one or more unwanted items in the list. See *"Deleting E-mail" on page 133*.
- **Compose E-mail** — See *"Sending E-mail" on page 130*.

  Note: Auto-notification e-mails are automatically deleted after 60 days.

CMAs

The **CMAs** tab displays a list of the contact's saved CMAs. The summary information includes CMA name and property type, number of comparables, modification and purge dates. From the **CMAs** tab, the following buttons are available:

Searching

Simple Searches from the Home Page

The Search function can be as simple or advanced as you like. If you know a little bit of information about a listing property or a contact, you can quickly search for and find the record directly from the Home page.

To conduct a more detailed search, click the **Search for a listing** link, or use the **Search** menu. See *"Using the Search Criteria Page" on page 68*.

Finding a Listing

Use the **Find a Listing** section of the Home page to quickly search for a property listing by using the Address, in whole or in part, or the ML number.

To find a listing by Address:

1. Under **Find a Listing**, click the **Lookup by Address** option button.

   Three address fields are available.
2. In the **Street#** field, type the address number only. If you have a partial address, enter the digits you know.
3. In the **Street Name** field, type the name, in full or part.

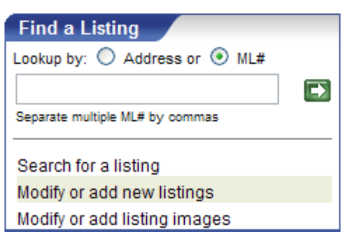
   Note: Do not type Street, Avenue, etc.
4. If there is an apartment or unit number to the address, type it in the **Unit#** field.
5. Select the **Show On Market listings only** check box to search the available properties only.
6. Click the **Go** button [].

   The Search Results page opens, displaying the matches, if any.

To find a listing by ML number:

1. Under **Find a Listing**, click the **ML#** option button.

Perform a quick search from this section of the Home page.



2. In the **Lookup by** field, type the <u>entire</u> ML number.

   Note: Partial ML numbers are not accepted.
3. If you are entering multiple ML numbers, separate them with commas.
4. Click the **Go** button [].

   The Search Results page opens, displaying a list of matches, if any.

Property Type Searches

There are several pre-defined property type searches available from the **Search** menu that let you query property information based on the specified system fields. You can add additional fields to the search form template to customize it, but then you must save it with a different name. See *“Saving a Prospect Search” on page 99*.

Quick Search for a Listing

If you need to perform a quick search for a listing using criteria other than the Address or ML number, click:

- the **Search for a listing** link on the Home page; or
- **Search**, then click the property type from the main menu.

The Search Criteria page opens letting you search for listings based on multiple search criteria. See *“Using the Search Criteria Page” on page 68*.

MLS Number Search

The MLS Number Search is similar to the **Find a Listing** by ML# search on the Home page, except that you can add more fields to the search form or select a system defined search template.

To search for an MLS Number:

1. From the **Search** menu, click **MLS Number Search**.

   The ML# search template opens.

Click the **Search** drop-down list and select from five available templates.

2. Type the entire ML # in the field.
   - to add more fields to the search criteria, click the **Add Fields** button in the Footer bar. See *“Adding More Search Criteria Fields” on page 70*. Or select the **ML# Search** template from the **Search** drop-down list.
3. Click the **Search** button.

   Note: To use a different search template, click the Search drop-down list and select from: All Property Search, Listing Maintenance Search, ML# Search, Multi-Address Search, Price Change Search or Price Variance Search.

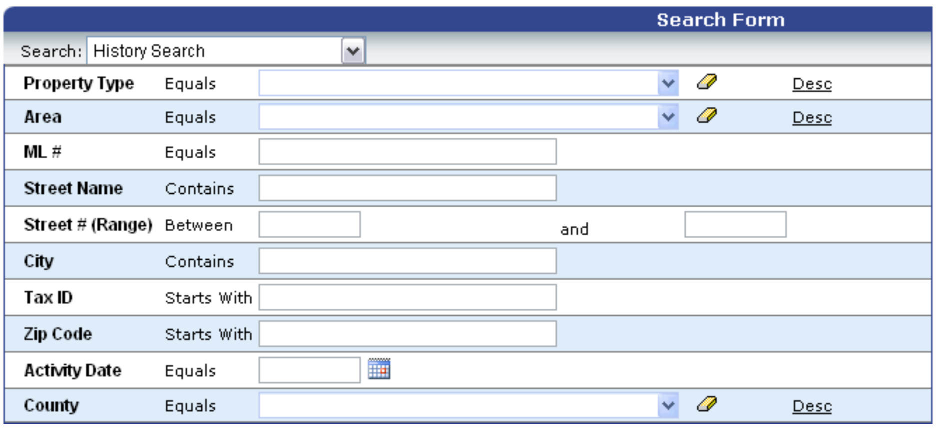
History Search

By performing a History Search, you can see the historic records of listing changes for one or more properties. Searches may include status or price changes, and whether or not the property was previously listed. TEMPO 5 saves the “before and after” values for each record, including the changed field, the date and time of modification, the date the change becomes effective and the User ID of the person who made the change.

To search for a property history:

1. From the **Search** menu, click **History Search**.

   The History Search template opens displaying pre-selected fields.



2. Complete the search fields as required. See *“Using the Search Criteria Page” on page 68*.
3. When you have entered all your search criteria, click the:
   - **Search Results** tab; or **Search** button [ ] in the Action bar to see a list of matching records. See *“Working with the Search Results Page” on page 75*.
   - **Save Search** button [ ] in the Action bar to save the settings. See *“Saving a Search” on page 73*.

Open House Search

The Open House search lets you locate active (or cancelled) open houses for a specified area and time-frame. If you select a property with multiple open houses, a single record of the listing will be displayed.

To search for open houses:

1. From the **Search** menu, click **Open House Search**.

   The Open House search template opens.
2. Complete the search form with your Open House search criteria (e.g., Area, Open House Date, etc.) See *“Using the Search Criteria Page” on page 68*.

Note: Now you can select open houses by using the search by map function. See "Using the Search Map Page" on page 74.

3. When you have entered all your search criteria, click the:
   - **Search Results** tab; or **Search** button [] in the Action bar to see a list of matching records. See *"Working with the Search Results Page" on page 75*.
   - **Download** button [] in the Action bar to export the search results. See *"Exporting Listings Data" on page 332*.
   - **Save Search** button [] in the Action bar to save the settings. See *"Saving a Search" on page 73*.

Creating More Advanced Search Queries

TIP ... Boolean operators include: AND, OR, NOT, etc.

The Search feature enables you to construct more complex search queries using Boolean field operators and multiple search criteria on a template, which you can save and re-use. Depending on the type of information you want to find, search for:

- contact records
- property types
- prospects
- listings and comparables
- tax information (where available)
- hotsheets
- offices and members

Using the Search Criteria Page

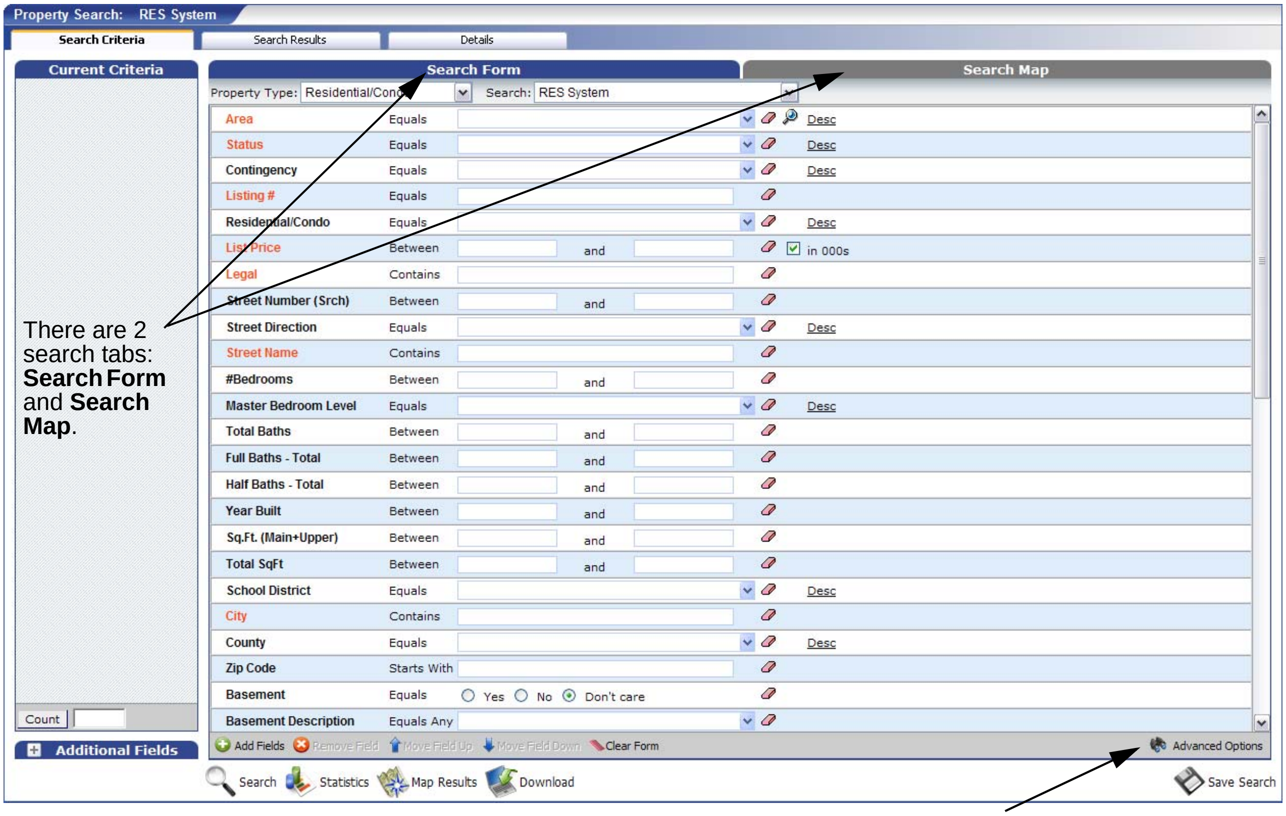
Whether you want to perform a Quick Search, or a more complex search, you will do so by specifying search criteria and field operators to build a query using the Search Criteria page. You can then save, edit and re-use copies of search templates.

Note: A template is comprised of the individual fields into which you enter search criteria.

To access the Search Criteria page:

- From the Home page, click the **Search for a listing** link.

The Search Criteria page opens.



Click here to show or hide the field operators: Between, Equals, Not Equal, Contains, etc., known as the advanced search options.

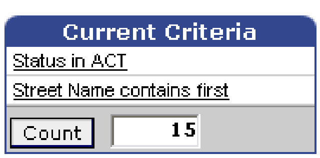
To create a more advanced listing search:

1. From the Search Form, you can select the search type:
   - click the **Property Type** drop-down list and choose a listing search (for example, **Residential/Condo**, **All Property Types** etc.).
   - select a **Search** template from the drop-down list. The templates can be found within several categories (for example, **System Searches**, **Office Searches**, or **My Searches**, etc.).

   The corresponding search form opens.

TIP ... When entering criteria, move quickly through the fields by using the TAB key.

2. Enter your criteria in the search template fields. For information on using pick lists, short codes and long descriptions, and other controls, see *"Field Related Controls" on page 19*.
3. Click the **Count** button in the **Current Criteria** section to display the number of listings that currently match, based on your criteria (which are also listed).



Note: If the number of matches is very large, you might want to further narrow the search before retrieving records.

4. To add more fields to the search template, click the **Add** button [⊞] to expand the **Additional fields** section, located in the sidebar; or click the **Add Fields** button in the Footer bar. See *"Adding More Search Criteria Fields" on page 70*.
5. To manage the fields on the Search Form, highlight a field in the list, then use the Footer bar buttons to add, remove, move up or down, and clear.

6. To add or change the search operators for one or more fields, click the **Advanced Options** button.
   - the field operator drop-down lists are displayed, letting you choose different operators. See *"Show/Hide Advanced Search Options" on page 71*.
7. If you plan on using this search again, click the **Save Search** button in the bottom right corner. See *"Saving a Search" on page 73*.
8. To graphically define the search area, click the **Search Map** tab. See *"Using the Search Map Page" on page 74*.
9. When you have entered all your search criteria, click the following:
   - **Search Results** tab; or **Search** button [Search] in the Action bar to see a list of matching records. See *"Working with the Search Results Page" on page 75*.
   - **Statistics** button to generate and print a statistics report.
   - **Map Results** button [Map Results] in the Action bar to see a list of matching records and a map. See *"Viewing a Map of Listing Search Results" on page 223*.
   - **Download** button [Download] in the Action bar to export the search results. See *"Exporting Listings Data" on page 332*.

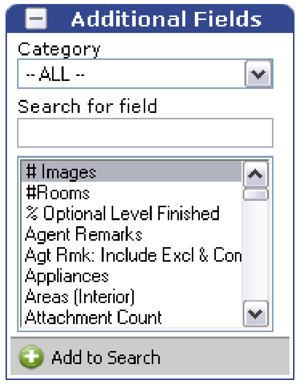
Adding More Search Criteria Fields

After you have selected a search type and template, you may decide that the query requires more fields than currently displayed. You can add additional search criteria fields to the template.

To add more search criteria fields:

1. From the Search Criteria page, click the **Add Fields** button in the Footer bar; or click the **Add** button [⊞] to expand the **Additional Fields** category in the sidebar.

The **Additional Fields** section expands.



2. Click the **Category** drop-down list and choose the category of new search criterion you want to add.

   The list displays all fields within the selected category.

3. To quickly find a field name, type full or partial information in the **Search for field** box.

4. Highlight the field you want to add to the search form, and then click the **Add to Search** button.

   The new field is appended to the bottom of the Search Form.

Show/Hide Advanced Search Options

More advanced users can use the default search operators to construct more complex search arguments using Boolean logic. Boolean logic consists of a series of true or false connectors (operators) linking conditions or statements.

There are three main Boolean operators: AND (which narrows a search), OR (which broadens a search), and NOT (which excludes from search).

There are plenty of resources available on Boolean logic. Try searching the Internet, which requires you to use some Boolean logic to enter your query!

To apply search operators to a field:

1. From the Search Criteria page, click **Show Advanced Options** in the Footer bar.

   A series of drop-down lists appear adjacent to the fields on the Search form, each with the applicable search operators for the search string you need to build.

NOTE! *Depending on the nature of the field, the list may contain operators such as Equals, Not Equals, Equals Any, Equals All, Between, Minimum, Maximum, Contains, Starts With, Not Starting with, and Advanced.*

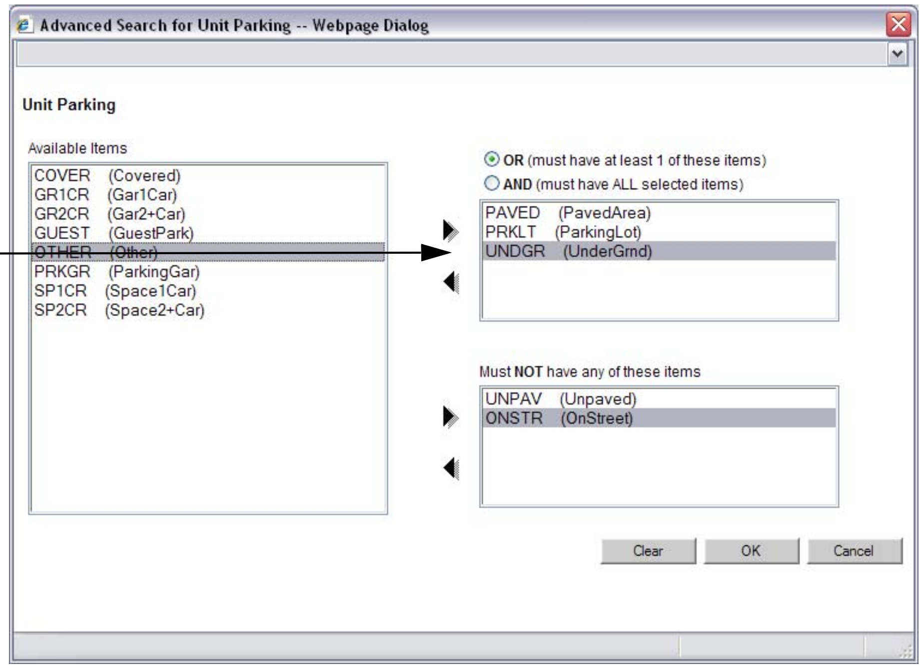
2. Select the operator that corresponds to the type of search you want to construct. For example, to create a search for properties with two or three bedrooms, select the **Between** operator for the **Beds** field, then enter **2** and **3** in the adjacent data entry fields.

3. To combine And/Or and Not arguments within a single field, select the **Advanced** operator from the drop-down list.

   Note: Advanced operator is not available for all fields. Examples of where you can find it include the Building Information, Laundry, Building Utilities or Unit Parking fields.

   The Advanced Search window opens.

Use the arrows to move selected items between lists.



4. Highlight items in the **Available Items** list, then click the Right arrow button [▶] to move them to the **And/Or/Must Not** lists.
   - for the **And/Or** list, select the option button above the list.
   - to remove all selections from the **And/Or/Must Not** lists, click **Clear**.
5. When you are satisfied with the Advanced Search operators, click **OK**.

   You are returned to the Search Criteria page.
6. Click the **Hide Advanced Options** button in the footer bar to return to normal view.

NOTE! *Changing a field's operator from Advanced to something else will delete the field's existing search criteria.*

Search Example:

Imagine you have an older client who is looking for a secure community, but isn't ready to move into an age-restricted retirement home. For this person, you could use the Advanced Search operator on the **Community Features** field to:

- add **Gated Community** and **Guard Gate** in the AND/OR list (using the OR operator); and
- add **Retirement Community** and **Age Restricted** in the NOT list.

The resulting search would query for properties in a gated area that are not just for elderly or retired people.

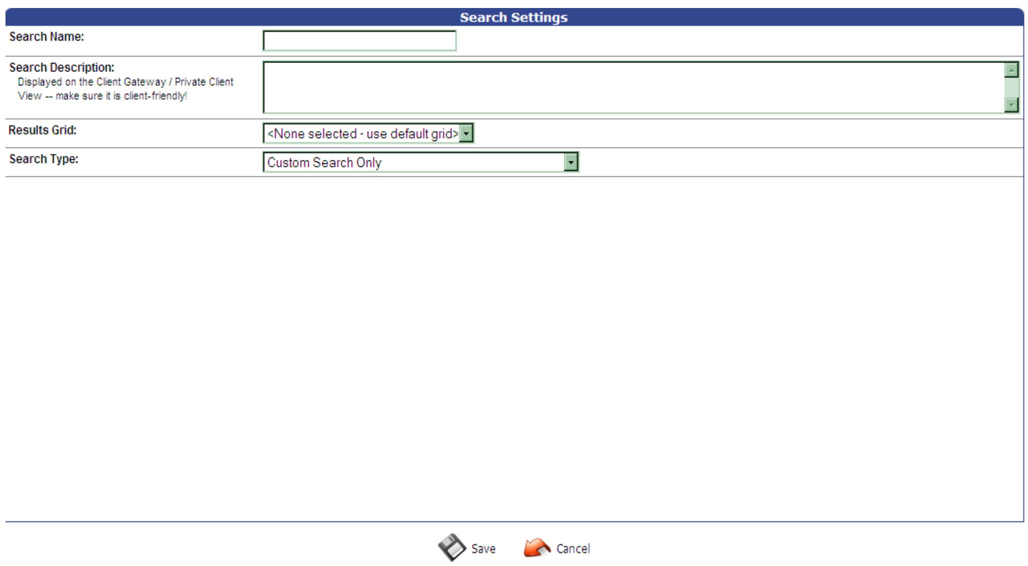
Saving a Search

Once you have added search criteria to define a property type search, you can save the search settings to the currently defined search; or save the settings as a new custom search.

To save search settings:

1. From the Search Criteria page, after you have entered your search criteria, click the **Save Search** button.

   The Search Settings page opens.



2. Type a **Search Name** in the text box.
3. Type a **Search Description** in the text box.

NOTE! *The Search Description is displayed publicly on the Client Gateway and Private Client View, so be sure the description is client-friendly.*

4. From the **Results Grid** menu, select the search results grid that you would like to use with this search.
5. Click the **Search Type** drop-down list and select one of the categories, for example, **Custom Search Only**.
6. Click the **Save** button.

   You are returned to the Search Criteria page of the saved search. The search also appears on the Search Manager page. See *"Working with the Search Manager" on page 83*.

Using the Search Map Page

As a matter of preference, you can graphically define the area you want to search by using a dynamic mapping system in conjunction with the Search Form.

NOTE! *If you try to specify an **Area** using both search criteria and the **Map Area** feature, no matching listings will be found unless the two areas overlap.*

To perform a map search:

1. From the Search Criteria page, click the **Property Type** drop-down list and choose the kind of records to search for (for example, Residential/Condo, etc.).
2. Select a **Search** template from the drop-down list. This can be a System or a Personal template.
3. Use the **Search Form** to enter essential search criteria, such as **Area**. See *"Using the Search Criteria Page" on page 68*.
4. Click the **Search Map** tab.
5. Define a search area on the map using the drawing tools. Mapping instructions are described in another section. See *"Mapping" on page 215*.

NOTE! *Notice the Current Criteria section on the side panel. It now displays the Longitude and Latitude values of the map location. If you want to go back to working with the criteria on the **Search Form**, be sure to clear any defining shape you drew on the **Search Map** tab.*

6. Click the **Show Listings** button on the footer bar to display the property "push pins" on the map.
7. Click the **Count** button in the **Current Criteria** section to display the number of listings that currently match, based on your criteria (which are also listed).

   If the number of matches is very large, you might want to further narrow the search before retrieving records.

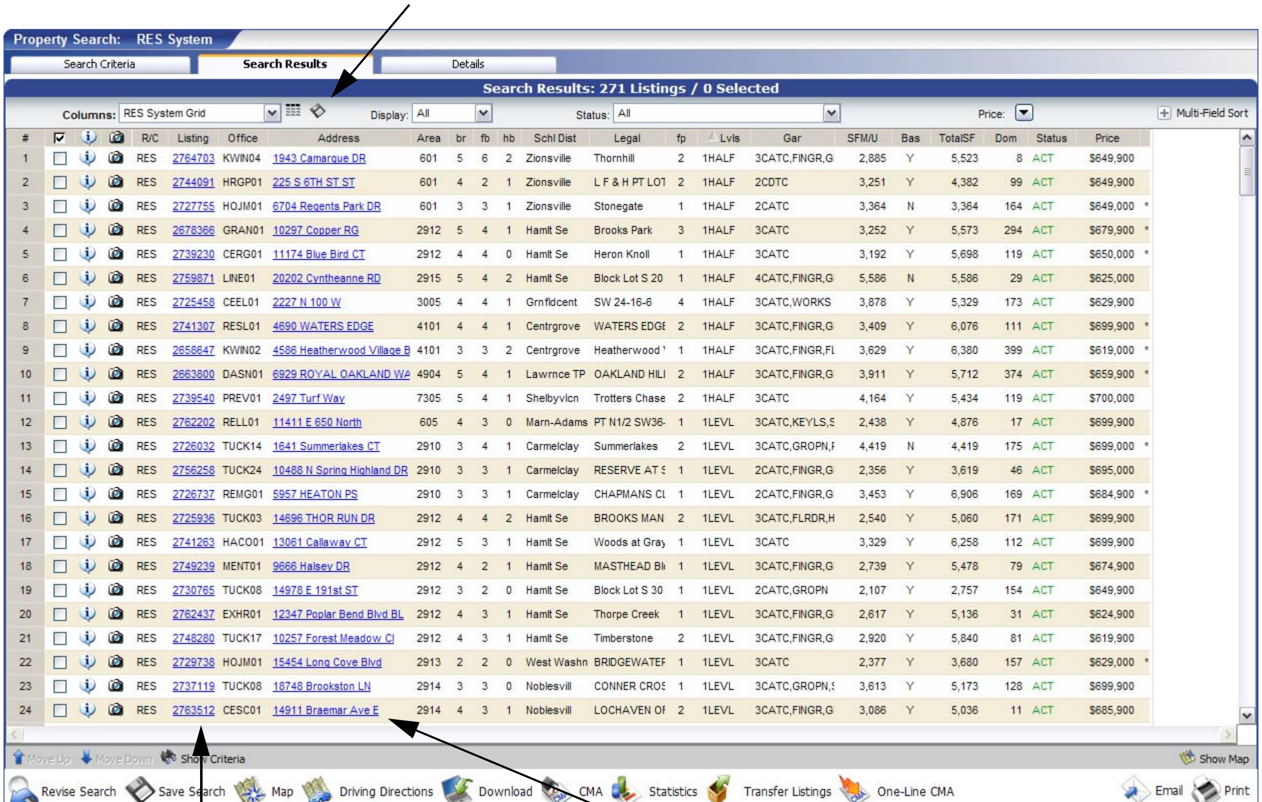
Working with the Search Results Page

The list of results on the Search Results page can be quickly and easily sorted, rearranged, and filtered to display the listing information in the manner that best suits your needs. You can also view the results with or without a map.

NOTE! *The **List Price** column displays price increase and decrease indicator icons. The **List Price** and **Status** columns both display color-coded values.*

Description	Text Color
Price increase	↑ **indigo**
Price reduction	↓ **violet**
Active status	**green**
Pending status	**orange**
Expired status	**purple**
Sold status	**red**
Off market status	**blue**

A new **Save Grid** icon lets you save any changes you made to the grid.

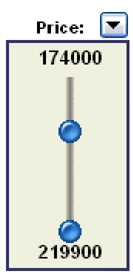


Click the **Listing** hyperlink to view the listing's details. Click the **Address** hyperlink to open a map of the listing's location.

To view the Search Results:

1. From the Search Results page, you can change the grid view by:
   - clicking a row to see an expanded preview of the listing details, including a thumbnail image of the property.

   - clicking the **Photo** button [ ] to launch the Image Viewer, with one or more snapshots of the property. See *"Managing Images" on page 293*.
   - clicking a column header to sort the entire list in ascending or descending order. See *"Viewing, Sorting and Filtering" on page 22*.
   - clicking the **Multi-Field Sort** button [+] to **Sort by** three levels of criteria as selected from the drop-down lists. See *"Viewing, Sorting and Filtering" on page 22*.
2. Click the **Columns** list and choose a layout grid; or click the **Column Manager** button [ ] to work directly with the Column Manager. See *"Managing Column Reports" on page 318*.
3. To display only those listings with a specified status, choose an item from the **Status** drop-down list, for example **Active**.
4. To filter by list price, click the **Price** arrow to display the slider control.



   - click and drag the markers to change the upper and lower limits of the price range.

   The Search Results list automatically updates to only show listings that have a list price within the selected range.
5. Using the mouse, point to the Information icon to display the **Quick Access** menu commands: **Report**, **Tax**, **Property History**, **Images**, **Map**, **Notes**, **Print**, **Email**, **Financial Calculators**, and **Charts**.

   Note: The Quick Access menu commands may vary for your particular area and MLS setup.

6. Select a record, then use the Footer bar buttons to narrow/restore the list, move the item up/down in the list, show/hide the search criteria used, or show/hide a map.
7. Select one or more records, then click a button from the Action bar to perform further tasks:
   - **Revise Search** — takes you back to the Search Criteria page to re-define your criteria.
   - **Save Search** — takes you to the Search Settings page to save the criteria to the current search template; or to name a new search. See *"Saving a Search" on page 73*.
   - **Map** — select one or more properties in the list, then click this button to display a Map View page. See *"Viewing a Map of Listing Search Results" on page 223*.
   - **Driving Directions** — click this button to plan your route to one or more selected properties. See *"Creating Driving Directions" on page 225*.
   - **Download** — click this button to export one or more listings for use with another program, such as Excel. See *"Exporting Listings Data" on page 332*.
   - **CMA** — click this button to create a new CMA presentation for a listing. See *"Creating a New CMA" on page 152*.
   - **Statistics** — click this button to generate a printable report. See *"Running Business & Statistical Reports" on page 193*.
   - **Transfer Listings** — click this button to transfer one or more selected listings to another listing or selling office.
   - **One-Line CMA** — click this button to generate a quick grid report based on the results that you can print or e-mail.
   - **E-mail** — click this button to send an e-mail to one or more properties. See *"Sending E-mail" on page 130*.
   - **Print** — click this button to print the search results grid view, or more detailed reports. See *"Printing Listing Search Results" on page 274*.
8. To view the records in more detail, select one or more, then click the **Details** tab to retrieve the data.

Viewing Listing Details

NOTE! *If you want to view just one listing record, you can roll the mouse pointer over the listing's Information icon on the Search Results page, and then click the **Report** button from the **Quick Access** menu. The listing appears in a pop-up window that you can keep open while you continue to work. From this window, you can view and **Print** a variety of detailed listing reports.*

To view the listing details for one or more selected properties:

1. From the Search Results page, select one or more records you want to view.

   Note: To view all properties, do not select any.

2. Click the **Details** tab to display the listing property details.

To view different property listings, select an item from the drop-down list or click the arrow buttons.

Select a report format from the **View** list. Favorite reports are shown at the top and are highlighted yellow.

A new **Select Stationery** icon lets you add a theme to e-mailed or printed reports.

3. Click the **Quick Link Button Bar** for more options:

NOTE! *The available quick links will differ according to your area and subscription to third-party providers.*

- **Listing** — includes in-depth property information, description, agent-to-agent remarks, financial and office information.
- **Images** — displays photos of the property.

- **Virtual Tour/Links —** displays virtual tours and third-party links for the property.
- **Tax** (if available in your area) — includes property tax information.
- **Map** — displays the property's location on a map.
- **Directions** — generates driving directions to the property.
- **History** — includes property history reports.
- **Attachments** — lets you view any attachment files associated with the property.
- **Calculators** — opens the Payment Calculator so you can use the financial functions.
- **Charts** — generates a Market Area Activity chart.
- **Report a Violation**— lets you send an e-mail to MarketLinx if you need to report a data error.

4. To view the listings using different report formats, click the **View** drop-down list on the **MLS Data** page, then select a report format.

   Your favorite reports are shown at the top of the list and are highlighted in yellow.

   Note: To set up your favorite reports, see "Choosing Your Favorite Reports" on page 46.

5. To apply a stationery to your report, click the **Select Stationery** icon to display a list of available templates. See *"Selecting a Stationery Style" on page 167*.
6. To move through the different listings/pages, click the left and right arrow buttons at the top of the page. Alternatively, you can go directly to a particular listing or report page by selecting the property address from the drop-list in the top left corner of the page.
7. Click the **E-mail** button to send an e-mail to selected recipients about the selected properties. Choose how they will view the report: Within the client gateway or Independent of the client gateway. See *"Enabling a Client Gateway" on page 101*.
8. Click the **Print** button to send the report to the printer. See *"Detailed Listing Reports" on page 275*.
9. To return to the Search Results page, click **Back to List**. You can also click the **Search Results**, or even **Search Criteria** tabs to return to those pages.

Viewing Images and Virtual Tours

The Image Viewer is a multi-faceted tool that enables you to view different image media, including an automated slideshow, a photo gallery view, virtual tours and attachment files. It can be accessed from any Search Results or Search Details page where there are attached images.

To use the Image Viewer from a search results page:

1. Using your mouse, point to the Information icon to display the Quick Access menu.
2. Click on one of the following icons:
   - **Images** — lets you access the **Slideshow** and **Photo Gallery** tabs.
   - **Links** (Virtual Tours) — lets you access the **Virtual Tour / Links** tab.
   - **Attachments** — lets you access the **Attachments** tab.

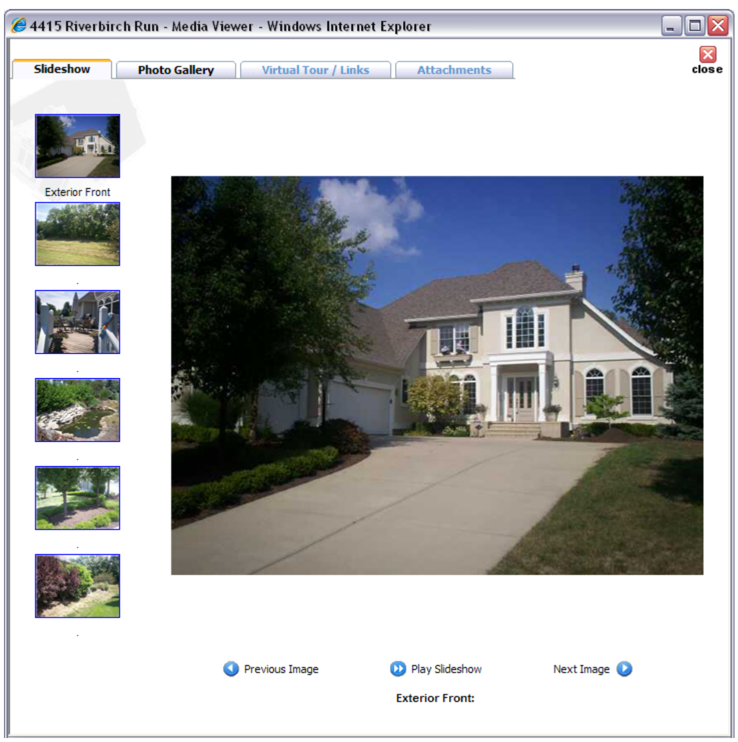
   The Media Viewer pop-up window opens.

NOTE! *The number of tabs available in the Image Viewer depends on what files have been appended to the record. For example, if there are no virtual tour links, the tab will not be available. To add attachments, select the* ***Edit*** *icon from the Quick Access menu.*

Viewing Slideshows

1. From the Image Viewer window, click the **Slideshow** tab.

   The page displays the pictures (slides) in the side pane, with the selected picture enlarged in the main frame.



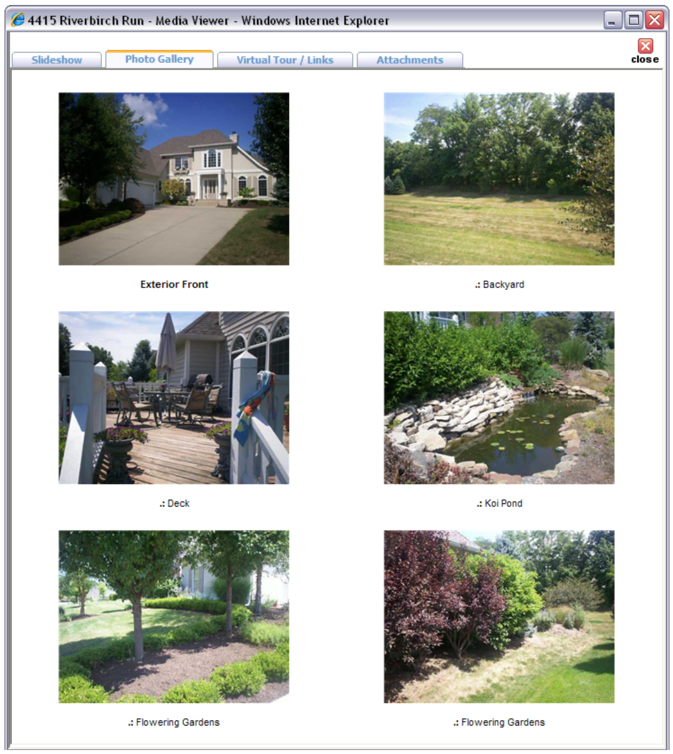
2. Use the following controls:
   - **Previous/Next Image** — click these buttons to scroll through each of the images, manually.
   - **Play Slideshow** — click this button to scroll through all of the images automatically (as a slideshow). The button changes to **Pause Slideshow**.

- **Pause Slideshow** — this button is only available once you have started playing the slideshow. Click the button to pause the slideshow.

Viewing the Photo Gallery

- From the Image Viewer, click the **Photo Gallery** tab.

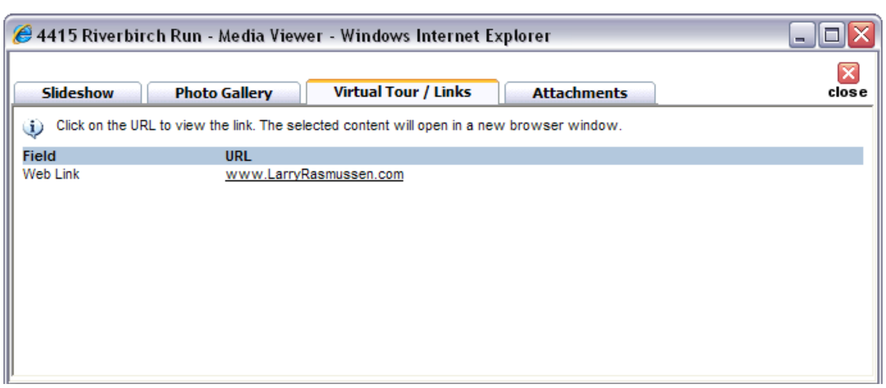
  The page displays the photos in two columns with a descriptive label beneath each image.



Viewing Virtual Tours

1. From the Image Viewer, click the **Virtual Tour / Links** tab.

   A list of available URLs appears on the page.

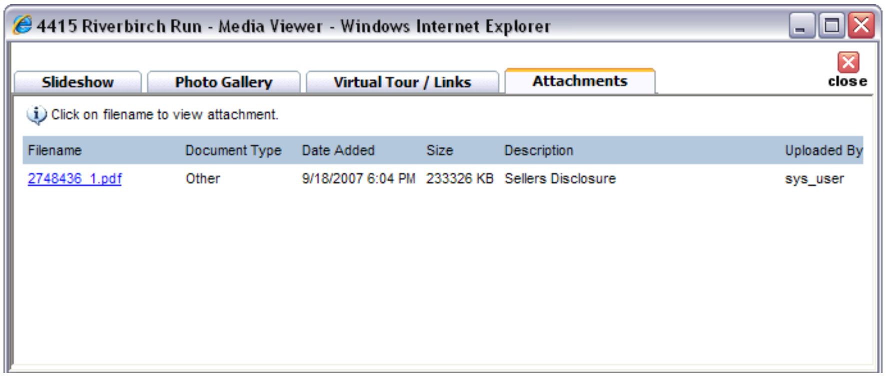


2. Click a link to launch a virtual tour (branded or non-branded) in a separate browser window.

Viewing File Attachments

1. From the Image Viewer, click the **Attachments** tab.

   A list of file attachments appears on the page.



2. Click a link to open a file attachment.

Working with the Search Manager

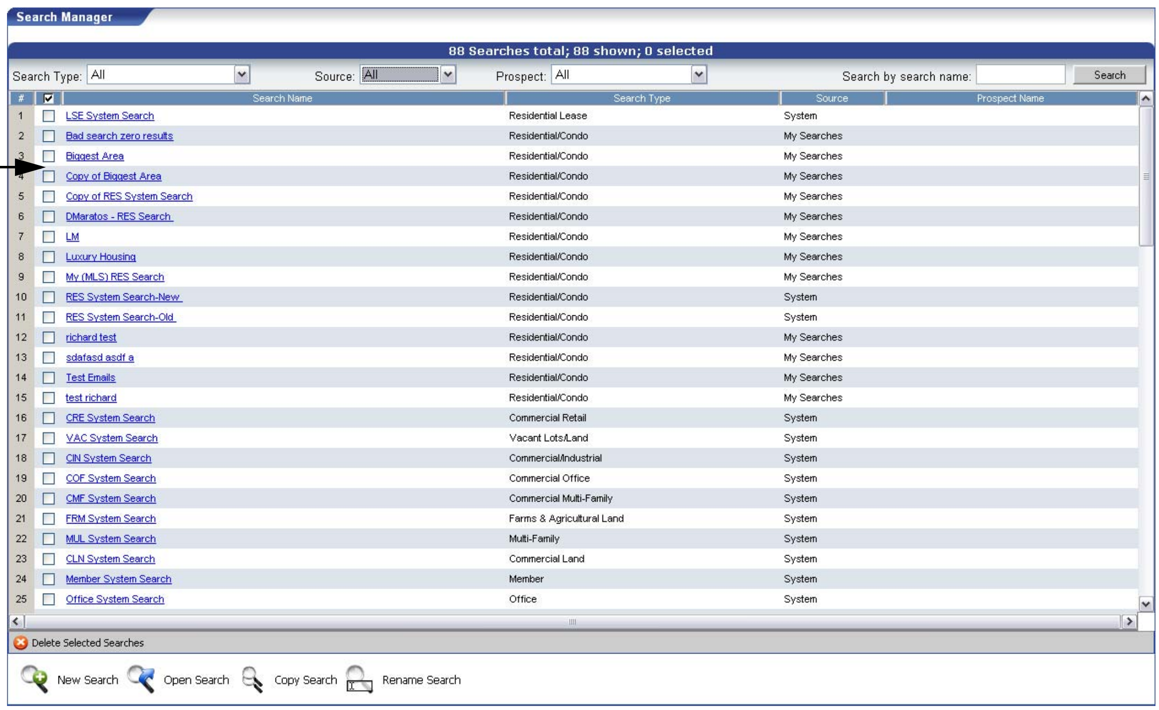
The Search Manager lets you easily manage the different kinds of searches you have set up (All Property Types, Member, Contact record, etc.) and filter them by their source (System, Office, Personal saved searches, etc.). You can also search for and re-use a favorite search.

To access and use the Search Manager:

1. From the main menu, click **Search**, and then click **Search Manager**.

   The Search Manager page opens.

Click the **Search Name** hyperlink to load the search criteria.



2. To sort the list of searches in ascending or descending order, click the column heading. See *"Viewing, Sorting and Filtering" on page 22*.
3. Click one of the drop-down lists to filter by:
   - **Search Type** — All, Member, All Property Types, History, Contact record etc.
   - **Source** — All, My Searches, Office, Firm, MLS or System.
   - **Prospect** — All, Prospect Searches or Non Prospect Searches.
4. To find a particular search, enter the name in full or in part, into the **Search by search name** field, then click **Search**.
   - click the **Show All** button to display all searches.
5. To load a specific search, click the search name (blue hyperlink) in the list.

   *Note: You can also select the search then click the **Open Search** button.*
6. To perform a new search, click the **New Search** button.

A blank Search Criteria page opens. See *"Using the Search Criteria Page" on page 68*.

7. Select one search record, then click a button from the Action bar to perform more tasks:
   - **Copy Search** — takes you to the Search Settings page, where you can create a copy of the selected search so that you can modify and reuse it. See *"Saving a Search" on page 73*.
   - **Rename Search** — takes you to the Search Settings page, where you can rename an existing search. See *"Saving a Search" on page 73*.
8. To delete one or more saved searches, select the unwanted items then click **Delete Selected Searches** in the footer bar.

Note: To print the actual property record details, select Print from the Search Results page. See *"Printing Listing Search Results" on page 274*.

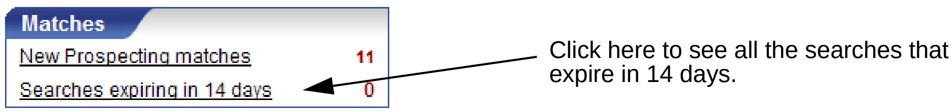
Prospecting

New Prospecting Matches

Once you have set up a prospecting search for a client using specific criteria, you can link this search to their client record for up-to-date monitoring. Additionally, you can set up the auto-notification feature to automatically check for new, or changed listings that match the prospect's search criteria. When listings match, the number of new listings is displayed on the Home page under **Matches**.

To see new prospecting matches:

1. From the **Prospecting** section of the Home page, any new matches such as a listing change or the addition of a property image, will show up in the counter.



NOTE! *To have the notifications go directly to the **Matches** section of the Home page, don't select the e-mail options when setting Auto notification. See* *"Modifying Search & Notification Settings" on page 94*.

2. Click directly on a link to open the Prospect Manager.

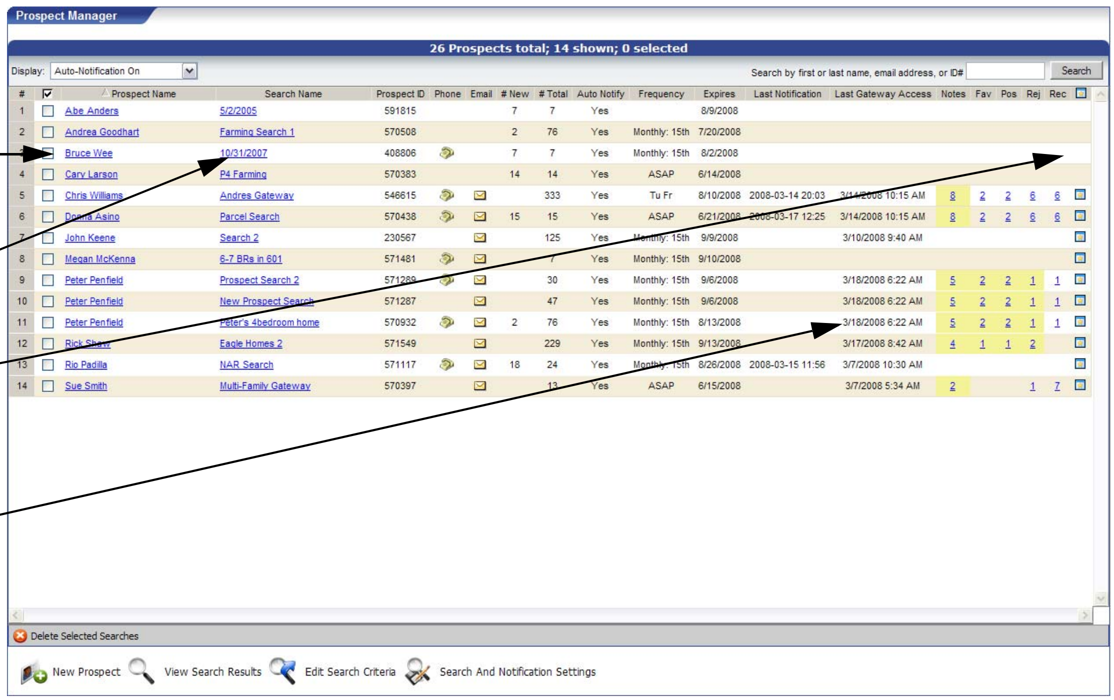
Working with the Prospect Manager

The Prospect Manager lets you easily view and manage the different kinds of searches you have set up (Prospecting and Non-Prospecting), and filter them by their source (System, Office, Personal saved searches, etc.). You can also modify the criteria and auto-notification settings for an existing search query.

To access and use the Prospect Manager:

1. From the main menu, click **Prospects**, and then click **Prospect Manager**; or click one of the links in the **Matches** section on the Home page.

   The Prospect Manager page opens.



Click the **Prospect Name** hyperlink to open the contact record.

Click the **Search Name** hyperlink to load the search criteria.

Click the icon to open the Browser and view the Personalized Real Estate Site for the client.

Check the **Last Gateway Access** column for the date and time of the most recent web site access.

2. Click the **Display** drop-down list and choose which searches you want to display: **All Searches**, **Auto-Notification On**, **Searches expiring in 14 days**, or **Auto-Notification Off**. See *"Viewing, Sorting and Filtering" on page 22*.
3. To find a particular search, enter (in full or in part) the first or last name, e-mail address or ID# in the field, in the top right corner, then click the **Search** button.
   - click the **Show All** button to display all searches.
4. To sort the list of searches in ascending or descending order, click the column heading. See *"Viewing, Sorting and Filtering" on page 22*.
5. Click any of the blue hyperlinks in the list (such as **Prospect Name** or **Search Name**) to retrieve the related data. For example, click the prospect's name to open the client record.
   - click the e-mail icon to send a message to the prospect. See *"Sending E-mail" on page 130*.

- hover the mouse over the phone icon to view the prospect's phone number.
- click the **Notes**, **Fav**, **Pos**, **Rej** or **Rec** column hyperlink (highlighted in yellow) to open the **Saved Listings** tab of the contact record. See *"Viewing Contact Record Details" on page 60*.
- click the [ ] icon in the last column to preview the personalized real estate site for the prospect. See *"Client Gateway" on page 257*.
- check the **Last Gateway Access** column to see the date and time the client gateway was accessed by the prospect.

6. To set up a new prospect type search, click the **New Prospect** button from the Action bar.

   The Prospect Wizard opens. See *"Creating a New Prospect Search" on page 98*.

7. Select a search record, then click a button from the Action bar to perform more tasks:

   - **View Search Results** — retrieves and displays new matches for the saved search. See *"Saving a Prospect Search" on page 99*.
   - **Edit Search Criteria** — opens the Search Criteria page, letting you modify the search criteria. See *"Editing Saved Search Criteria" on page 93*.
   - **Search And Notification Settings** — the Search Settings page opens, letting you save search settings and edit the auto-notification settings. See *"Modifying Search & Notification Settings" on page 94*.

8. To delete one or more saved searches, select the unwanted items then click **Delete Selected Searches** in the footer bar.

Viewing Search Results

Use the selected search criteria to perform the search again to find new results. The list of results can be quickly and easily sorted, rearranged, and filtered to display the saved search information in the manner that best suits your needs. You can use the Column Manager to view the results in a different layout format. See *"Column Manager" on page 317*.

The page and its options are very similar to the Search Results page arrived at through Search Manager. See *"Working with the Search Results Page" on page 75*.

To retrieve new search results from a saved search:

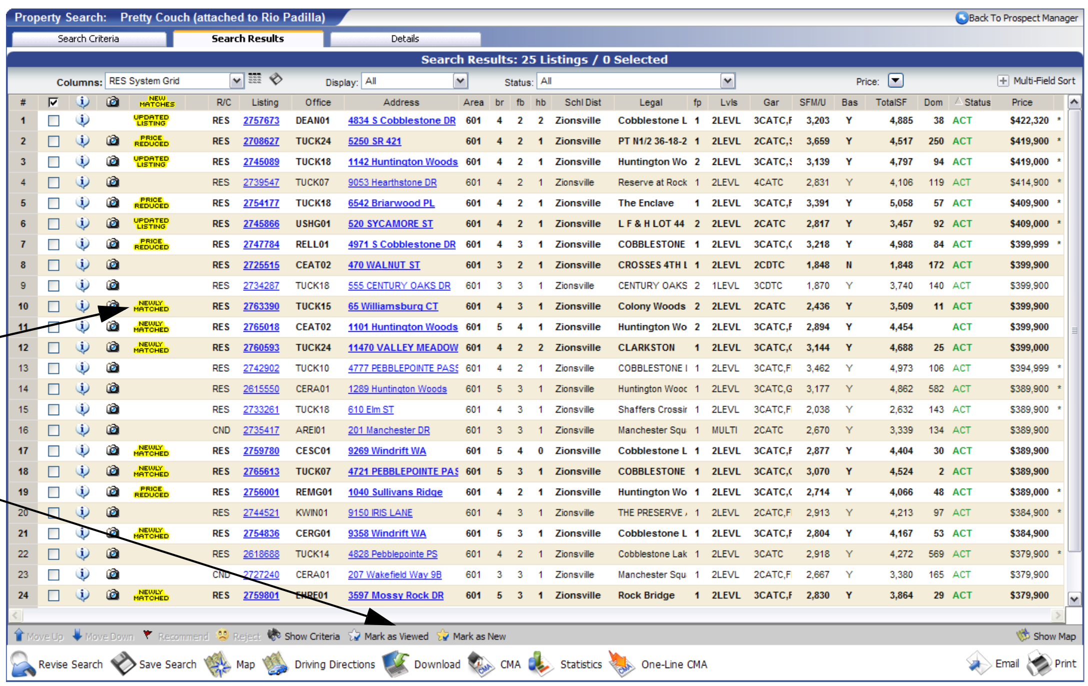
1. From the Prospect Manager page, select one or more check boxes of the searches you want to run.
2. Click the **View Search Results** button.

   The Property Search [Search Name] page opens with the **Search Results** tab selected.

   Note: Any new matches that have occurred since the search was last run, are highlighted with a yellow 'Newly Matched' icon.

The **Newly Matched** icon and bold type indicates new matches since that you have not yet marked as read.

To **Mark as Viewed**, select the item, then click the button in the footer bar.



3. If you selected multiple searches, use the **Previous** [ ] and **Next** [ ] buttons at the top of the page to scroll through each of the search results.
4. Click a blue hyperlink to view the details of the selected search.

5. Select a search result in the list, then click one of the buttons on the footer bar: **Move Up**, **Move Down**, **Recommend**, **Reject**, **Show Criteria**, **Mark as Viewed**, **Mark as New** or **Show Map**. See *"Viewing, Sorting and Filtering" on page 22*.

6. Using the mouse, point to the **Information** icon and select a **Quick Access** menu item:

   - **Report** — displays a property listing report that you can print or save as a PDF. See *"Printing Listing Search Results" on page 274*.
   - **Tax** — displays a public tax listing report that you can print or save as a PDF. See *"Viewing Tax Details" on page 202*.
   - **Property History** — displays the Property History Report that you can print or save as a PDF.
   - **Images** — opens the Image Viewer, letting you see property photos. See *"Image Report" on page 297*.
   - **Map** — displays the selected property on a map that you can print. See *"Viewing a Map of Listing Search Results" on page 223*.
   - **Notes** — displays the Note dialog box, letting you add or edit comments associated with the property. See *"Property Notes and Ratings" on page 91*.
   - **Edit** — lets you view or edit the listing's details. See *"Listing Maintenance" on page 112*.
   - **Print** — lets you choose the print options for listing reports. See *"Printing Listing Search Results" on page 274*.
   - **E-mail** — lets you choose the properties you want to e-mail. See *"Sending E-mail" on page 130*.
   - **Financial Calculators** — opens the Payment Calculator. See *"Using the Payment Calculator" on page 209*.
   - **Charts** — displays the market area activity as a line chart, that you can cut and paste into another program, or print.

7. Select one or more search results in the list, then click one of the action buttons:

   - **Revise Search** — returns you to the Search Criteria page to revise search criteria.
   - **Save Search** — displays the Search Settings page so you can save the criteria. See *"Modifying Search & Notification Settings" on page 94*.
   - **Map** — displays the search results on a map. See *"Viewing a Map of Listing Search Results" on page 223*.
   - **Driving Directions** — lets you plot a map of directions to the properties. See *"Creating Driving Directions" on page 225*.
   - **Download** — exports the listing data in a format that can be used by another application, such as Excel. See *"Exporting Listings Data" on page 332*.
   - **CMA** — select a listing to begin a new CMA presentation. See *"Creating a New CMA" on page 152*.

- **Statistics** — displays listings statistics in a format that you can print.
- **One-Line CMA** — lets you create a simple one line grid report based on one or more of the selected properties.
- **E-mail** — lets you e-mail a link to the selected properties; or add to the client gateway as an Agent recommendation. See *"Sending E-mail" on page 130*.
- **Print** — lets you print the selected listing reports. See *"Printing Listing Search Results" on page 274*.

8. Click the **Back to Prospect Manager** button in the Header bar.

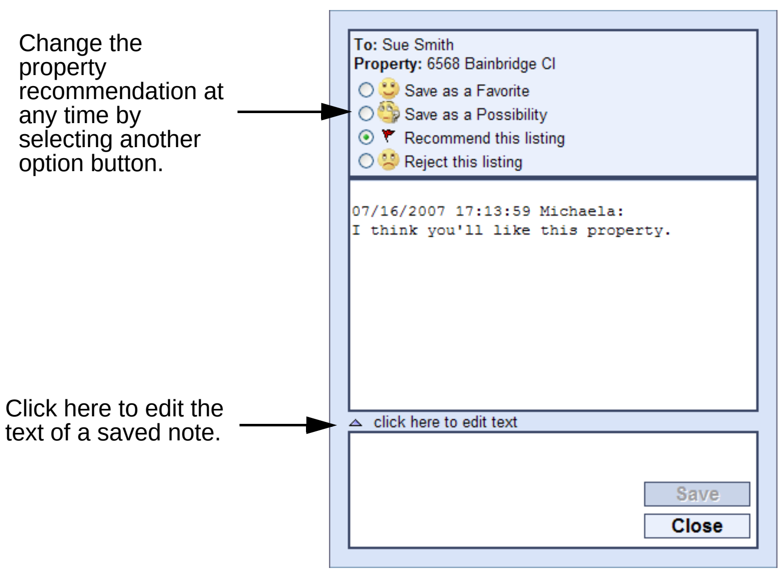
Property Notes and Ratings

When you enter property notes for a listing, keep in mind the comments are for your prospect to read when they view a recommended property using the Client Gateway. The note is time and date stamped. You can also select a rating option, e.g. **Recommend this listing**.

To add a note from the property Search Results page:

1. Using the mouse, point to the **Information** icon of a selected listing to display the **Quick Access** menu.
2. Click the **Notes** [ ] button.

   The Note web page dialog box opens.



3. Type your comments in the bottom text box, then click **Save**.

   The dialog closes and a flag icon appears in the grid to indicate there are notes associated with the listing.
4. Click the **Back to Prospect Manager** link in the header bar, where you can view the comments by clicking the hypertext number (which shows the number of notes associated with the listing) in the **Notes** column.

The **Saved Listings** tab of the contact record opens, displaying a list of the properties, their ratings and a **view/edit** link to the comments. See *"Working with the Prospect Manager" on page 87*.

To edit the text of a saved note:

1. From the Note dialog box, click the small up arrow and "edit text" label located between the two text fields.

   You can now modify the text of the saved comment.

2. Click **Save**.

To remove the 'Newly Matched' indicator:

1. Select one or more properties in the list.
2. From the footer bar, click the **Mark as Viewed** button.

   The bolding and the Newly Matched indicator are cleared.

To mark a property match as "New" again:

1. Select one or more properties in the list.
2. From the footer bar, click the **Mark as New** button.

   The Newly Matched indicator is displayed.

Editing Saved Search Criteria

You can change the search criteria of a selected saved search directly from the Prospect Manager.

To load the criteria of a selected saved search:

1. From the Prospect Manager, either:
   - click directly on the **Search Name** blue hyperlink; or
   - select a single search in the list and click the **Edit Search Criteria** button.

   The Property Search [Search Name] page opens with the **Search Criteria** tab selected.
2. Make any changes to the search criteria fields. See *"Using the Search Criteria Page" on page 68*.
3. Click the **Save Search** button.
4. Click the **Back To Prospect Manger** button in the Header bar.

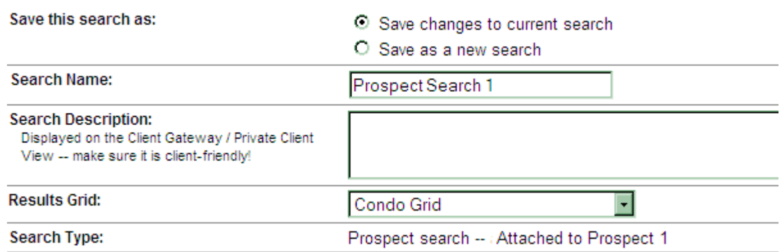
Modifying Search & Notification Settings

From the Prospect Manager page, select one prospecting search in the list to specify how the prospect is to be notified of new matching listings. You can save new, modify, or delete a prospecting search's notification settings.

To view or modify search settings:

1. From the Prospect Manager page, select a prospecting search in the list.
2. Click the **Search And Notification Settings** button.

   The Search Settings page opens for the selected search.
3. Select one of the **Save this search as** options:
   - **Save changes to current search** — click this default option to save any minor changes you may have made to the current settings.



   - **Save as a new search** — click this option to keep the original search intact, while saving the new search settings under a different name and **Search Type**.

   *Note: The **Save Search** function is usually performed from the Search Criteria and Search Results pages, but can be done from the Search Settings page.*
4. In the **Search Name** field:
   - accept the current name or type a new one for a saved search;
   - type a new name for a new search.
5. In the **Search Description** field:
   - accept the current description or type a new one for a saved search;
   - type a brief description for the new search's client gateway (optional).
6. From the **Results Grid** menu, select the search results grid that you would like to use with this search.
7. In the **Search Type** section:
   - the current search type setting is displayed for the existing saved search;
   - click the drop-down list and choose one of the available search types for a new search (this is only possible when you are saving as a new search).
8. Click **Save**.

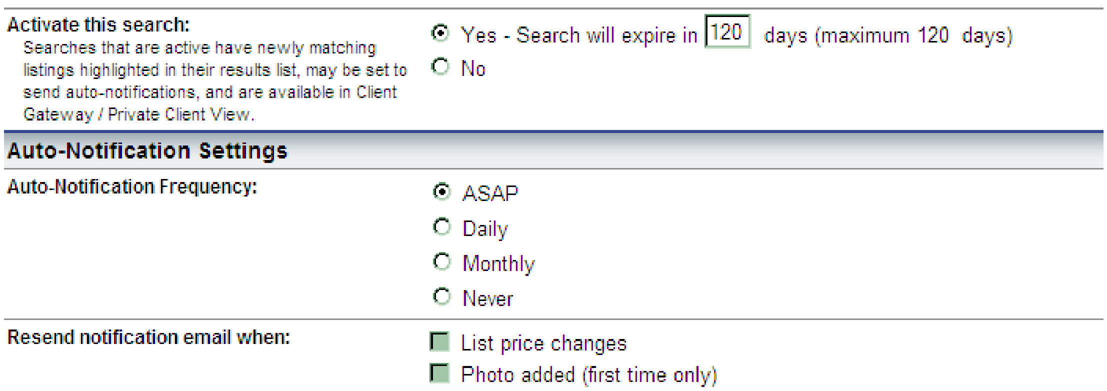
You are returned to the Prospect Manager.

Note: Click the ***Search And Notification Settings*** *button again to make further changes, or to specify the auto-notification settings for the selected search.*

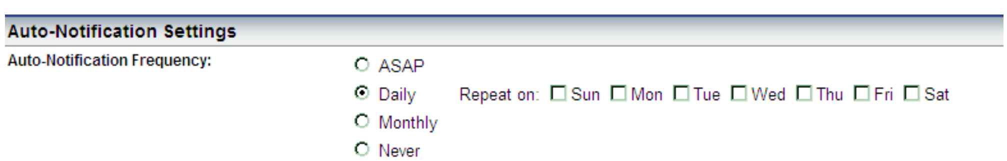
9. Proceed to the **Auto-Notifications Settings** section, where you can define the frequency, duration and trigger events for sending e-mail notifications.

To view or modify auto-notification settings:

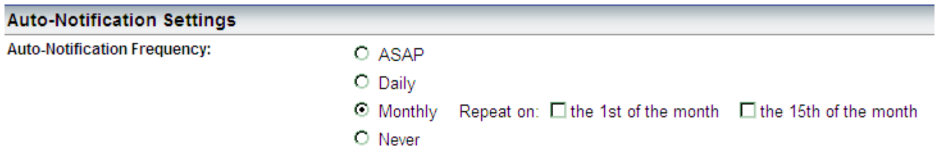
1. In the **Auto-Notification Settings** section of the Search Settings page, select the following options:
   - **Activate this Search**— click **Yes** to use auto-notification.



2. In the **Auto-Notification Expiration** section, enter the number of days (up to a maximum of 180) in which e-mail auto-notification will expire. After this time, no more e-mail notifications will be sent.
3. In the **Auto-Notification Frequency** section, select how often you want the notification e-mails to be sent:
   - **ASAP** — sends a separate e-mail notification as soon as a new or changed listing matches the saved search criteria.
   - **Daily** — sends a single, combined notification e-mail on the day(s) of the week you specify by checking one or more of the check boxes.



- **Monthly** — sends a single, combined notification e-mail on the 1st of the month and/or the 15th of the month, depending on the check boxes selected.

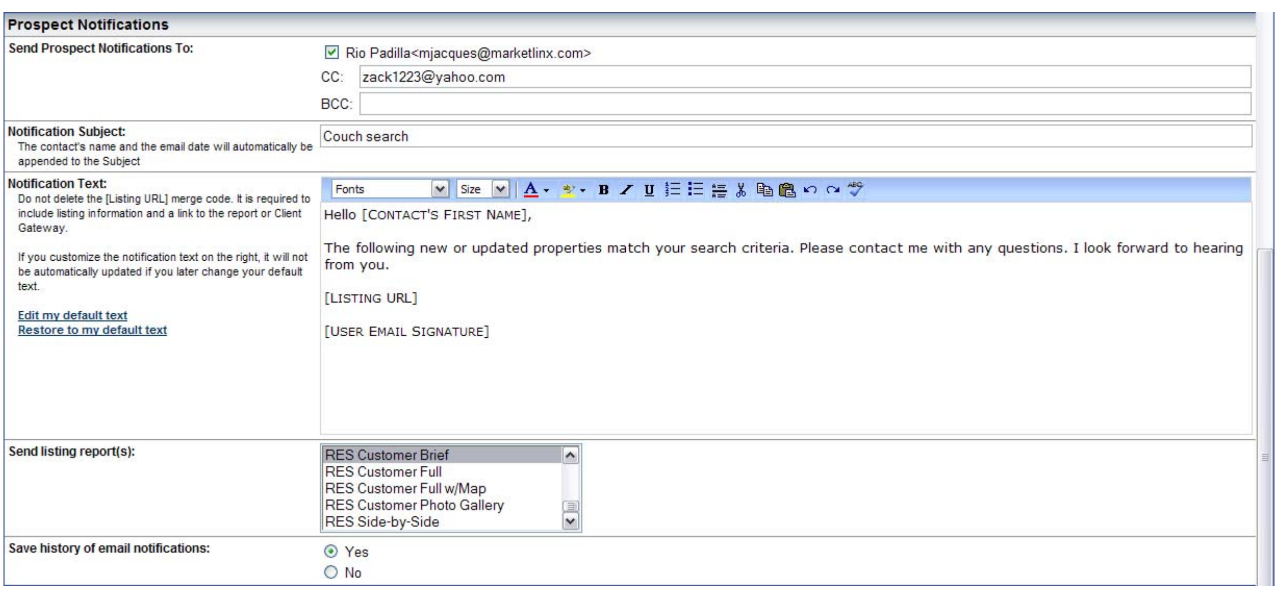


- **Never** — searches will run, but no notifications will be sent.

4. In the **Resend notification e-mail when** section, select one or both check box(es):
   - **List price changes** — the notification is sent again, should the list price change.
   - **Photo added** — the notification is sent again, but only once, should pictures be added.
5. In the **Allow Reverse Prospecting** section, select **Yes** or **No**. See *"Reverse Prospecting" on page 109*.
6. Proceed to the **Prospect Notifications** section, where you can set automatic e-mail notifications to the prospect associated with the selected saved search.

To view or edit prospect notification settings:

1. In the **Prospect Notifications** section of the Search Settings page, select the **Send Prospect Notification To** check box to send an e-mail to the prospect's primary e-mail address (displayed by default).



- use the **CC** or **BCC** fields to copy or blind copy other recipients on the e-mail notifications. Enter their e-mail addresses in the fields.

2. In the **Notification Subject** field, either accept the default 'Notification' subject line or type your own.

Note: The contact's name and e-mail date will be added to the subject line automatically.

3. In the **Notification Text** section, use the default text message 'as is' or apply text attributes by using the toolbar.

   Note: Do not delete the [Listing URL] merge code from the body of the message or else recipients will not be able to view the new property listing matches.

4. Click one of the links:
   - **Edit my default text** — displays the Notification Message pop-up dialog where you can change the text of the message that is sent with each e-mail.
   - **Restore to my default text** — click this link to revert back to the original notification message.

5. If the prospect does not have a client gateway set up, the **Send listing report(s)** drop-down list becomes available. Select a report from the list.

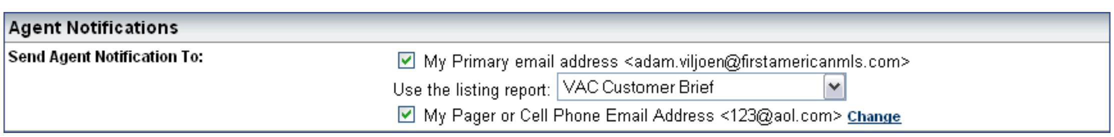
   Note: If the prospect has a client gateway set up, you cannot send a listing report. Instead, the client gateway will be used. See "Enabling a Client Gateway" on page 101.

6. In the **Save history of e-mail notifications** section, click the **Yes** option to save a copy of the e-mail notification in the prospect's E-mail History. See *"Viewing Contact Record Details" on page 60*.

7. Proceed to the **Agent Notifications** section, where you can select a report and send a copy of the notifications to the agent's primary e-mail or cell phone address.

To view or edit agent notification settings:

1. In the **Agent Notifications** section of the Search Settings page, select the select the **My Primary email address** check box if you want to receive a copy of the notification via e-mail.



2. Click the **Use the listing report** drop-down list box to select the name of a report.

3. Select the **My Pager or Cell Phone E-Mail Address** check box if you want to receive notification by way of your e-mail enabled pager or cell phone.
   - click the **Change** link to modify the displayed e-mail address.

4. Click **Save**.

   You are returned to the Prospect Manager page.

Creating a New Prospect Search

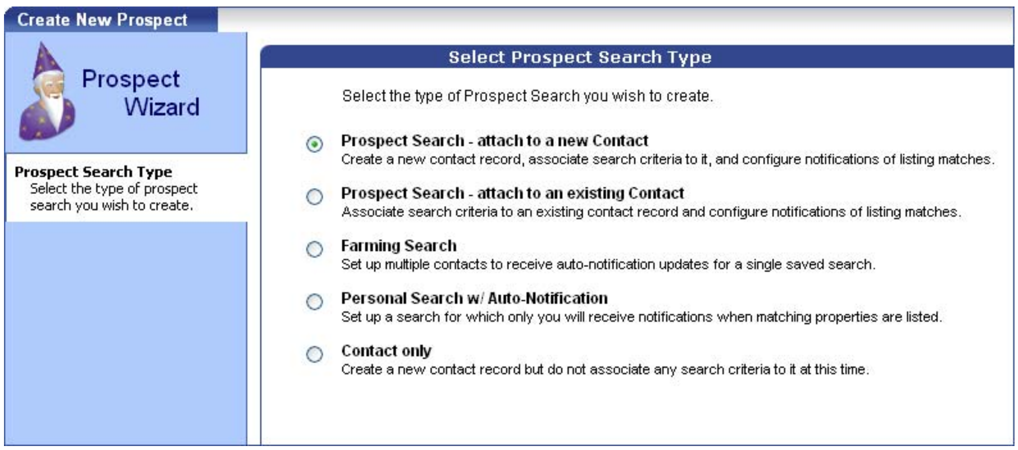
The Prospect Wizard guides you with easy step-by-step on-screen instructions on how to create one of five types of prospecting searches. Use the Select Prospect Search Type page to select one of the prospecting search type options.

TIP ... You can also open the Prospect Wizard from the Prospect Manager page by clicking the New Prospect button.

To access the New Prospect Search Wizard:

1. From the main menu, click **Prospects**, and then click **New Prospect Wizard**.

   The Select Prospect Search Type page opens.

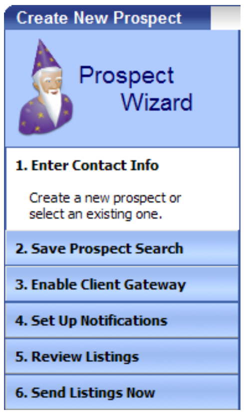


2. Select one of the option buttons:
   - **Prospect Search - attach to new Contact** — create a new contact record, associate search criteria to it, and set up auto notifications of listing matches. See *"Attaching to a New Contact" on page 99*.
   - **Prospect Search - attach to an existing Contact** — associate search criteria to an existing contact record and set up auto notifications of listing matches. See *"Attaching to an Existing Contact" on page 105*.
   - **Farming Search** — set up multiple contacts to receive auto notification updates for a single saved search. See *"Farming Search" on page 106*.
   - **Personal Search with Auto Notification** — set up a search for which only you will receive auto notifications when matching properties are listed. See *"Personal Search with Auto-Notification" on page 107*.
   - **Contact only** — create a new contact record, but do not associate any search criteria to it at this time. See *"Contact Only" on page 108*.

   Depending on the option you selected, the next logical page opens. You can see the number of steps involved with each search type by looking at the Prospect Wizard navigation bar.

Attaching to a New Contact

If you selected the Prospect Wizard's first option, you will be guided through the six steps of creating a new contact record, saving the prospect search and attaching it to a new contact, enabling the client gateway, setting up notifications, reviewing the matching listings and sending them to the prospect via email.



To attach a prospect search to a new contact:

1. From the Select Prospect Search Type page, select the **Prospect Search - attach to a new Contact** option.
2. Click **Next Step**.

   The Contact Info page opens.
3. Enter client information in the **Contact Information**, **Summary Comments**, **Home/Work/Other Address**, **Tracking Information**, **Contact's Preferences** and **Contact's Personal Information** sections. See *"Adding a New Contact" on page 58*.

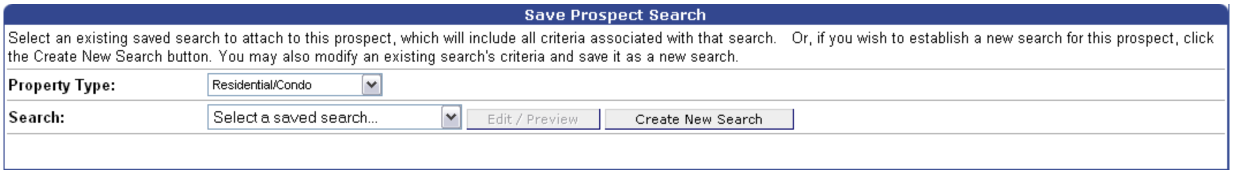
   Note: Be sure to complete all required fields (red text). It's a good idea to enter an e-mail address to take advantage of e-mail features.
4. Click **Next Step**.

Saving a Prospect Search

When you have defined a search query to your liking and are satisfied with the results, you'll want to re-use it by associating the search to a prospect, either existing or new. You can select an existing search and rename it, or define a new search.

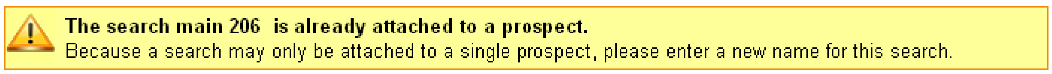
To attach an existing search to the prospect:

1. From the Save Prospect Search page, click the **Property Type** drop-down list and select a search type, for example, **Residential/Condo**.



2. Click the **Search** drop-down list and select an existing saved search.

NOTE! *If you select a saved search that has auto-notification enabled (listed under the* ***Prospect Searches: Auto-Notification On*** *or* ***Off*** *categories), you will be prompted to rename the search.*



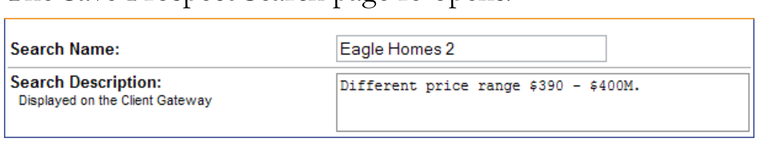
NOTE! *If there are no saved searches under the category you want, it means the list is empty and you'll have to create a new search.*

3. Click the **Edit/Preview** button if you want to modify the search criteria, prior to renaming the selected search. See *"Using the Search Criteria Page" on page 68*.
4. Type a new name in the **Search Name** text box.
5. Type a short description in the **Search Description** text box. that will be displayed on the client gateway.
6. Click **Next Step**.

To attach a new search to the prospect:

1. From the Save Prospect Search page, click the **Property Type** drop-down list and select a search type, for example, **Residential/Condo**.
2. Click the **Create New Search** button to build a new search query to associate with your new contact. See *"Searching" on page 63*.
   - enter search criteria, perform a preliminary **Count** on the Search Criteria page and click **Save**; or
   - click the **Search Results** tab to retrieve the matching listings, select the records you want and click **Save**.

   The Save Prospect Search page re-opens.



3. Enter a **Search Name** and **Search Description** for the new search.
4. Click **Next Step**.

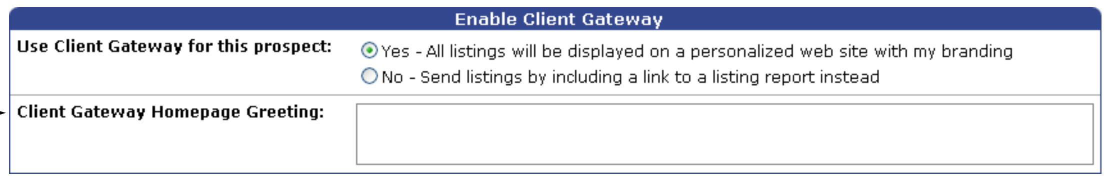
Enabling a Client Gateway

The client gateway lets you establish a personalized, branded web site where the prospect can view recommended listings, make notes, and more.

To set up a client gateway for the prospect:

1. From the Enable Client Gateway page, the **Yes** option is selected by default.

The greeting will appear on the web site's Home page.



NOTE! *If you have attached a new search, the system assumes automatically that a Client Gateway is being used.*

2. Type a **Client Gateway Home page Greeting** in the text box.
3. Click **Next Step**.

To send a Listing report via e-mail:

1. From the Enable Client Gateway page, click the **No** option.
2. Click **Next Step**.

   The Set Up Notifications page opens, with the **No** option selected by default.
3. Click **Finish**.

   You are returned to the Prospect Manager page.

Setting Up Notifications

The Set Up Notifications page lets you specify how to notify the prospect of new matching listings. You can also modify notifications directly from the Prospect Manager page. See *"Modifying Search & Notification Settings" on page 94*.

To set up Auto-Notification settings for the prospect:

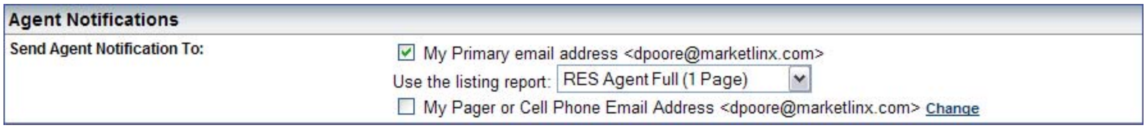
1. From the Set Up Notifications page, complete the sections:

NOTE! *The option buttons in the **Use Auto-Notification** section will not be available. Since you have enabled the Client Gateway, the **Yes** option is pre-selected.*

- **Auto-Notifications Settings** — follow the instructions as described in *"To view or modify auto-notification settings:" on page 95*.
- **Prospect Notifications** — follow the instructions as described in *"To view or edit prospect notification settings:" on page 96*.

NOTE! *Since the prospect has a client gateway set up, you cannot send a listing report. Instead, the client gateway will be used.*

- **Save history of e-mail notifications** — section, click the **Yes** option to save a copy of the e-mail notification in the prospect's E-mail History.
- **Agent Notifications** — follow the instructions as described in *"To view or edit agent notification settings:" on page 97*.



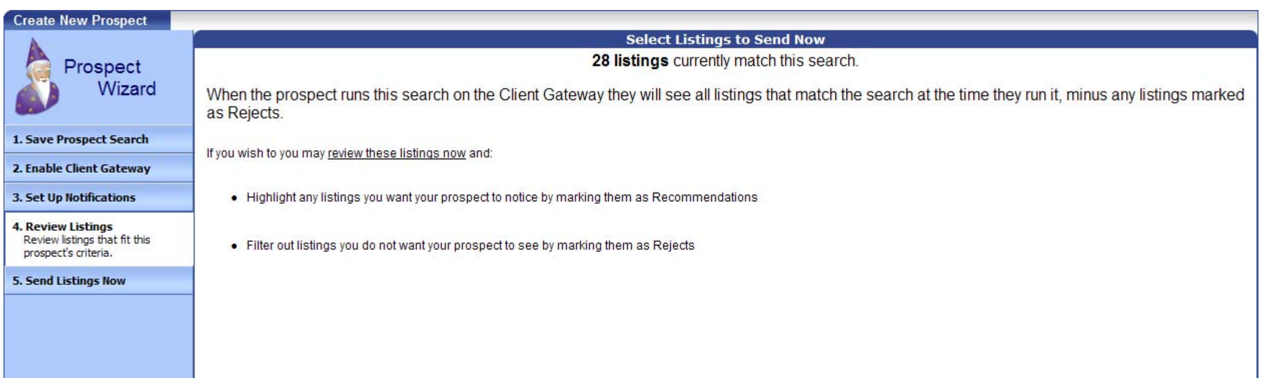
2. Click **Next Step**.

Reviewing Listings

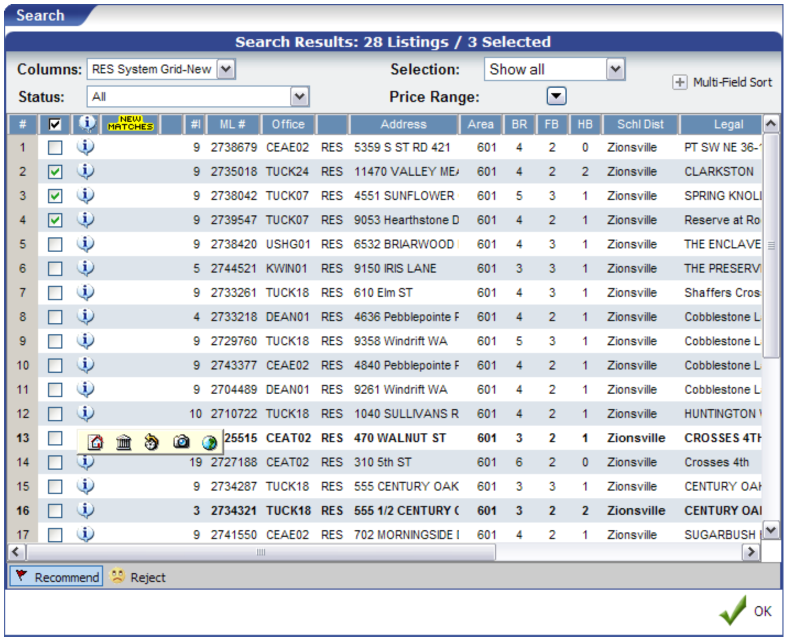
The Select Listings to Send Now page lets you review the listings that currently match the prospect's search criteria and select those you Recommend, while filtering out those you Reject. When the prospect runs this search on the web site, they will see your recommended properties. Or, you can choose to allow the auto-notifications to send only new or updated listings to the prospect at a later time. See *"Sending E-mail" on page 130*.

To send selected listings to the prospect:

1. From the Select Listings to Send Now page, click the **review these listings now** link.



The Search Results pop-up window opens with the newly match listings. See *"Working with the Search Results Page" on page 75*.



2. Select only those listings you want to send to the prospect, then click the **Recommend** button on the footer bar.

   The red flag [ ] icon appears in the row of recommended listings.

   *Note: Be sure to clear the check boxes for the Recommended listings prior to selecting listings you want to tag as **Reject**. Otherwise, all selected listings, including the Recommended ones, will be tagged as **Reject**.*

3. To filter out those listings you don't want your prospect to see, select them in the list, then click the **Reject** button.

   The frowning face [ ] icon appears in the row of rejected listings.

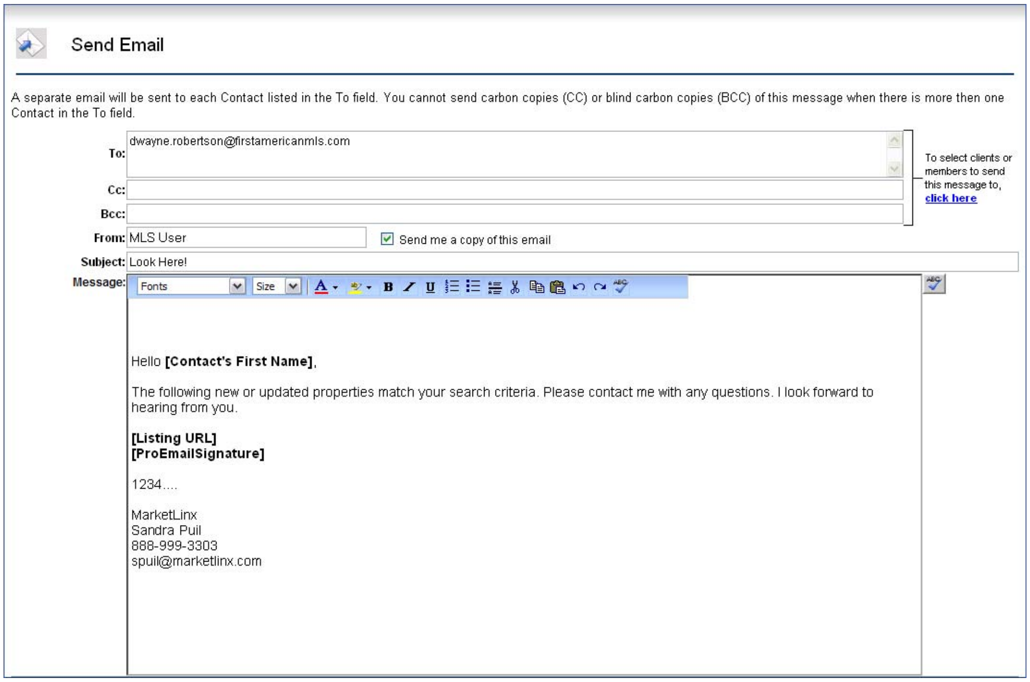
4. Click **OK**.

   You are returned to the Select Listings to Send Now page. The total number of listings recommended (and rejected) is reflected in the new total.

5. Click **Next Step**.

Sending Listings Now

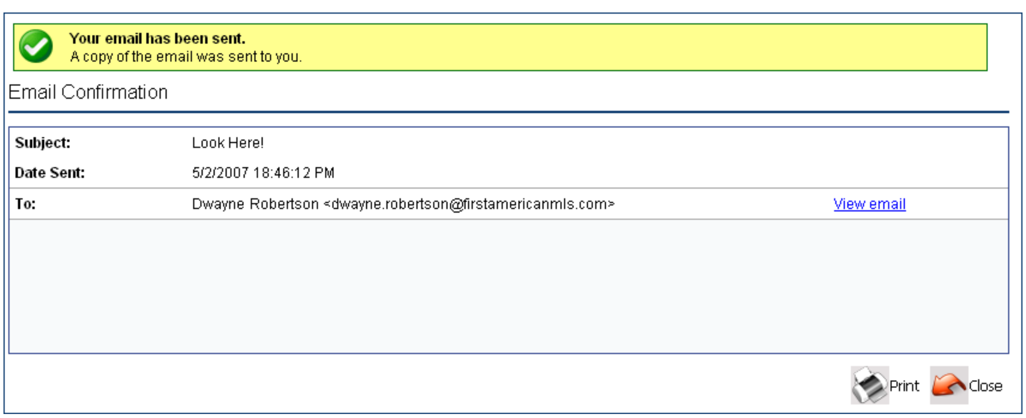
The Send E-mail page opens when the selected prospect has a valid e-mail address entered in the Contact record and you have chosen to send matching listings.



To send an e-mail to the prospect:

1. The Send E-mail page should have the relevant fields already completed. Make any changes as required. See *"Sending E-mail" on page 130*.
   - to add more recipients, click the link to the right of the To/CC/Bcc fields.
   - select/clear the **Send me a copy of this email** check box to enable/disable this option.
2. Click the **Finish** button.

   The e-mail is automatically sent and the Email Confirmation page opens.



3. Click the **View email** link to read the message.

4. Click the **Print** button to print a copy of the confirmation.
5. Click **Close**.

   You are returned to the Prospect Manager.

Attaching to an Existing Contact

If you selected the Prospect Wizard's second option, you will be guided through the five steps of saving the prospect search and attaching it to an existing contact, enabling the client gateway, setting up notifications, reviewing the matching listings and sending them to the prospect via email.

To attach a prospect search to an existing contact:

1. From the Select Prospect Search Type page, select the **Prospect Search - attach to an existing Contact** option. The **Select a Contact** drop-down list opens. You can toggle how the client list is sorted (by first or last name) by clicking the resort name button [].
2. Click an existing client name.
3. Click **Next Step**.

   The Save Prospect Search page opens.
4. The remaining steps are the same as for attaching a prospect search to a new contact. See:
   - *"Saving a Prospect Search" on page 99*.
   - *"Enabling a Client Gateway" on page 101*.
   - *"Setting Up Notifications" on page 101*.
   - *"Reviewing Listings" on page 102*.
   - *"Sending Listings Now" on page 104*.

Farming Search

If you selected the Prospect Wizard's third option, you will be guided through the four steps of saving the prospect search and attaching it to a multiple contacts, setting up notification updates, reviewing the matching listings and sending them to the prospects via email.

To create a new farming search:

1. From the Select Prospect Search Type page, select the **Farming Search** option.
2. Click **Next Step**.

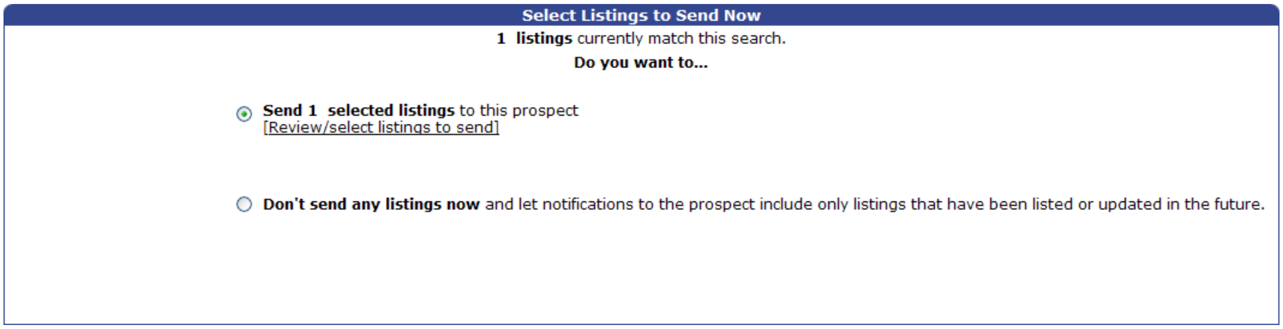
   The Save Prospect Search page opens.
3. Select an existing saved search and rename it; or create a new search. See *"Saving a Prospect Search" on page 99*.
4. Click **Next Step**.

   The Set Up Notifications page opens.
5. Set up new auto-notification settings, or edit the existing settings inherited from a saved search. See *"Setting Up Notifications" on page 101*.
   - **Notification Subject** — this field in the **Prospect Notifications** section cannot be left blank.
   - **Modify recipients list** — click this link and select multiple recipients to receive this e-mail.

NOTE! *There must be at least one recipient specified to whom notifications will be sent.*

6. Click **Next Step**.

The Select Listings to Send Now page opens.



7. Select the **Send [x] selected listings to this prospect** opion button.
   - click the **Review/select listings to send** link. View the search results, select the check boxes of the listings you want to send, then click the **Send Selected Listings to Prospect** button.

   *Note: If you select the **Don't send any listings now** option, auto-notifications sent to the prospect later will include only those properties that have been listed or updated. Click **Finish**.*
8. Click **Next Step**.

   The Send E-mail page opens.
9. Add more contacts to the e-mail recipients list, if you want, choose whether or not to send a copy of this e-mail to yourself, and append text to the e-mail message area. See *"Sending Listings Now" on page 104*.
10. Click **Finish**.

    The E-mail Confirmation page opens, letting you view or print the e-mail message.

Personal Search with Auto-Notification

If you selected the Prospect Wizard's fourth option, you will be guided through the two steps of setting up a prospect search for which only you will be sent auto-notifications when matching properties are listed.

To create a personal search with auto-notification to yourself:

1. From the Select Prospect Search Type page, select the **Personal Search w/ Auto Notification** option.

2. Click **Next Step**.

   The Save Prospect Search page opens.

3. Select an existing saved search and rename it; or create a new search. See *"Saving a Prospect Search" on page 99*.

4. Click **Next Step**.

   The Set Up Notifications page opens.

5. Choose whether or not to set up and use Agent-only Auto-Notification. If **Yes**, include:

   - **Notification Subject** — this field in the **Prospect Notifications** section cannot be left blank.
   - **My Primary E-mail Address** — select this check box to include, then click the drop-down list and choose a report format.
   - **My Pager or Cell Phone E-mail Address** — select this check box to include, then click the **Change** link if you need to modify this address.

   See *"Setting Up Notifications" on page 101*.

6. Click **Finish**.

Contact Only

If you selected this option, you will create a new contact record only, without associating any search criteria to it at this time. See *"Adding a New Contact" on page 58*.

Reverse Prospecting

Reverse prospecting lets you match all current active and pending market listings (for which you are the listing agent or co-list agent) to active prospects, who are set up to allow reverse prospecting. The **Allow Reverse Prospecting** option can be selected when you are setting the **Auto-Notification Settings** for a saved search.
See *"Setting Up Notifications" on page 101*.

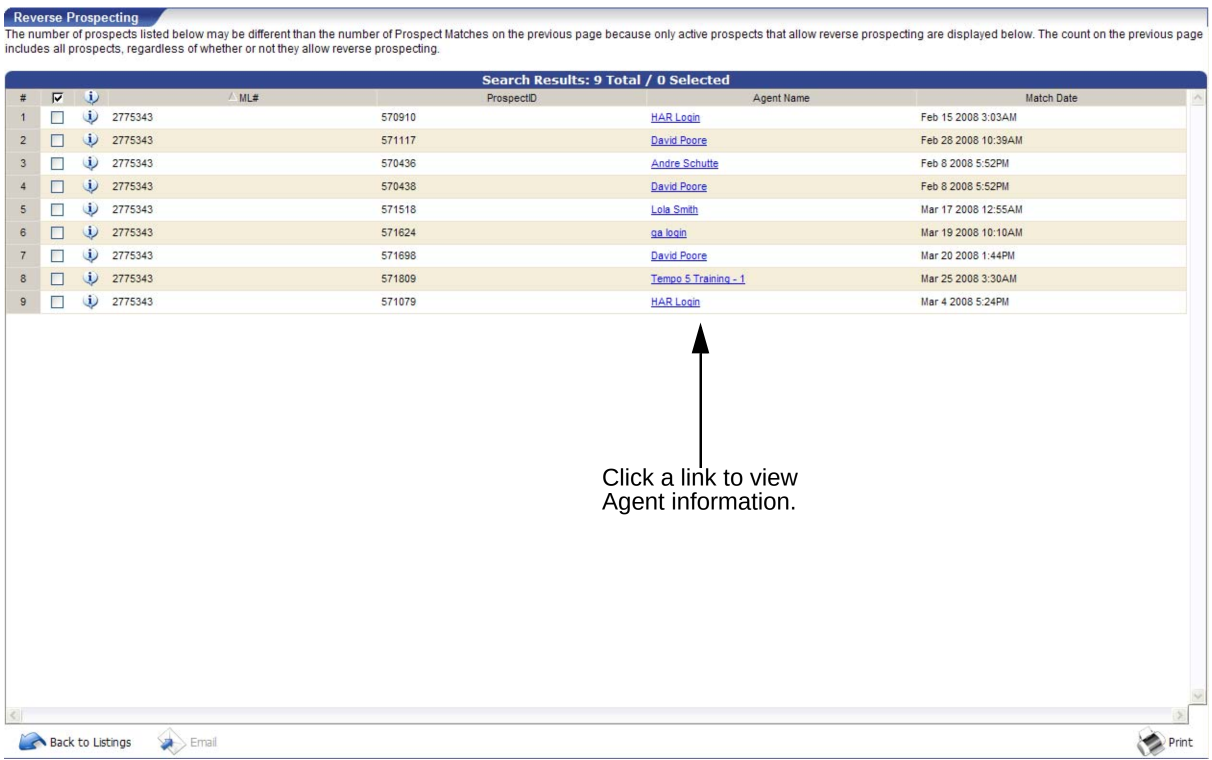
To search for active prospects for your current listings:

1. From the **Prospects** menu, click **Reverse Prospecting**.

   My Current Listings page opens displaying the number of listings.

2. Select the check box for a listing to reverse prospect.
3. Click the **View Matching Prospects** button.

   The Reverse Prospecting page opens, displaying a list of all prospect searches.



Note: The prospects listed on this page are active prospects who have the Allow Reverse Prospecting option enabled. *See "Modifying Search & Notification Settings" on page 94*.

4. Select a prospect in the list then click one of the action buttons:
   - **E-mail** — lets you send an e-mail to the agent associated to the selected record.
   - **Print** — lets you preview, save as PDF or print the search results grid list.
5. Click **Back to Listings** to return to the My Current Listings page.

Listing Manager

Listing Maintenance

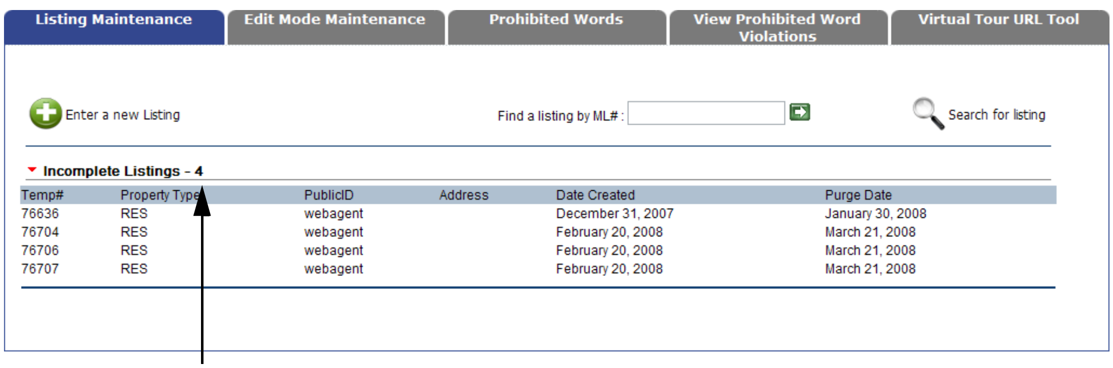
The Listing Maintenance functionality in TEMPO 5 lets you search for a listing, add a new listing, and modify or delete existing listings from the MLS database. Features include the ability to automatically complete the listing information from public tax records, to graphically pinpoint a listing's location on a map, and to save unfinished listings for later completion. Other tabs allow you to add and view prohibited words.

NOTE! *Some or all components of Listing Maintenance may not be available to you. The procedure for loading listing information and images varies from area to area.*

To access Listing Maintenance:

1. From the main menu, click **My Tools > Staff Tools**.

   The **Listing Manager** link in the navigational sidebar is selected by default. The Listing Maintenance page opens displaying a list of any Incomplete Listings you may have been working on. See *"Working with an Incomplete Listing" on page 114*.



A counter shows you the number of incomplete listings.

2. To search for an existing listing that has been submitted:
   - enter the listing's ML number in the **Find a listing by ML#** field, then click the arrow **[ ]** button.
   - click the **Search for listing** button, perform a search and select the record. See *"Using the Search Criteria Page" on page 68* and *"Editing an Existing Listing" on page 119*.
3. To add a new listing, click the **Enter a new Listing** button. See *"Adding a New Listing" on page 114*.

Expanding Listing Form Fields

You can expand picklist fields and free form text fields that allow more than 50 characters:

1. Press F7 or ALT+Down Arrow on your keyboard.

2. Click the field (or the screen next to the field) to expand it.

You can cancel the auto-expand feature by pressing F7 or ALT+Down Arrow again.

Working with an Incomplete Listing

When adding a new listing, you can temporarily stop working on it and not lose any of the information. The next time you open the Listing Maintenance page, you'll see a list of the Incomplete Listings.

To access an Incomplete Listing:

1. From the Listing Maintenance page, click a row.

   The Modify Incomplete Listing page opens.

   Note: The Modify Incomplete Listing page looks almost identical to the Add New Listing page.

2. Complete the rest of the fields. See *"Adding a New Listing" on page 114*.
3. Click one of the action buttons to perform more tasks:
   - **Map Property** — to manually locate the property address. See *"Using the Map Property Feature" on page 117*.
   - **Tax Autopop** — to automatically search for and insert tax information. See *"Using the Tax Auto-pop Feature" on page 118*.
   - **Delete** — deletes the record you are currently working on. A message box opens asking you to confirm the deletion. Click **OK**.
   - **Print** — generates a selected listing report to send to the printer. See *"Printing" on page 265*.
4. When the listing is complete (all required fields are complete), click **Submit**.

Adding a New Listing

You can add a new listing record to the MLS database. If you are working on an Incomplete Listing record, you can use these same instructions to complete the fields. Skip to step #5.

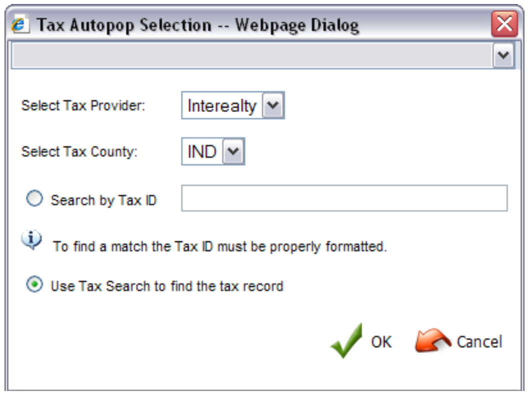
To enter a new listing record:

1. From the Listing Maintenance page, click the **Enter a new Listing** button.

   The Add Record dialog box opens.

2. Click the **Select Property Type** drop-down list and choose from the available property types, for example Residential/Condo, Duplex, Land, etc.
3. Click **OK**.

The Tax Autopop Selection pop-up window opens.

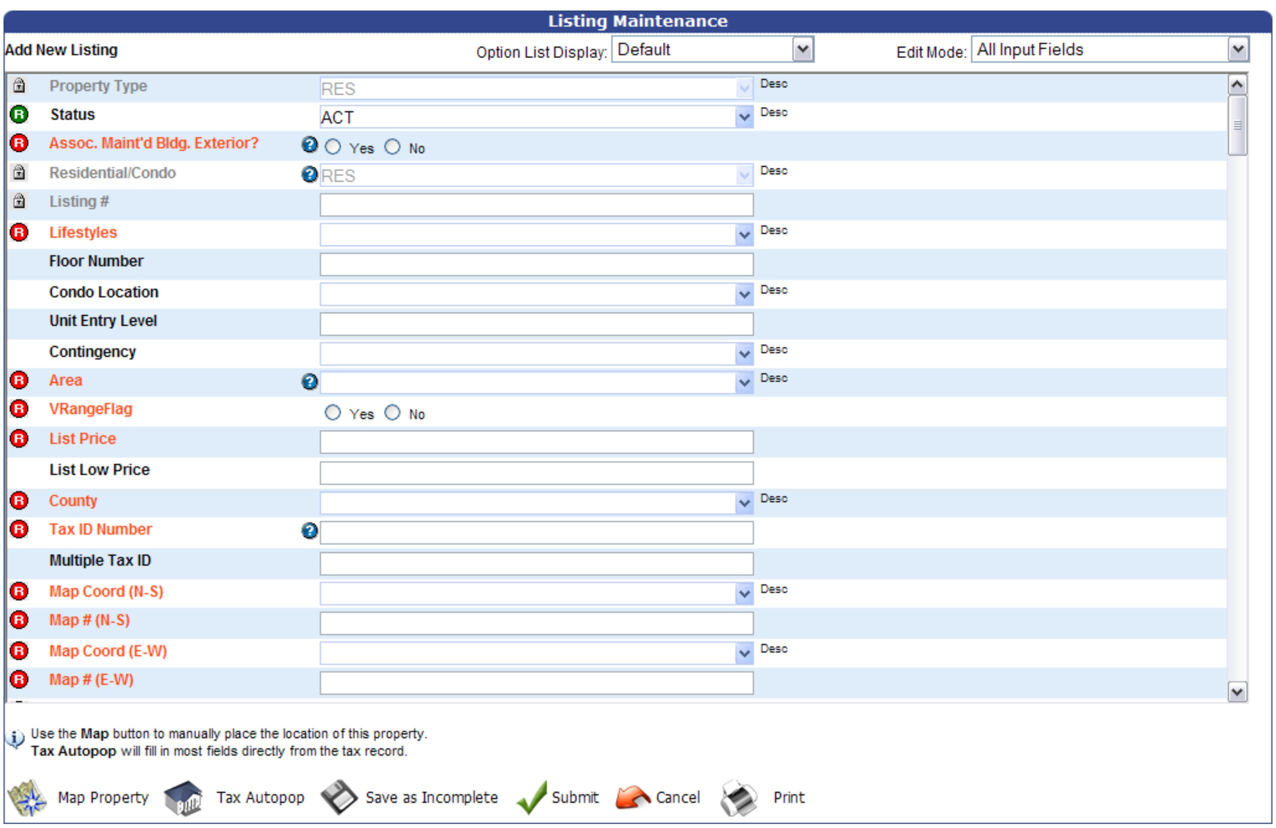


Note: The Tax Search feature may or may not be available in your area.

4. If you do not want to auto-populate the listing information form with tax information at this time, click **Cancel** to go immediately to the *Adding a New Listing* page.

NOTE! *You can use the **Tax Autopop** button at the bottom of the Add New Listing page. See* *"Using the Tax Auto-pop Feature" on page 118*.

The Add New Listing page opens.



5. To change the display of information in the pick list fields, click the **Option List Display** drop-down list and select one of the options:

- **Default** — displays the default setting for all pick list fields on the page.

- **All as Short Code** — changes all pick list fields on the page to display the information as a short code.
- **All as Long Description** — changes all pick list fields on the page to display the information as a long description.

6. To display only specific fields, click the **Edit Mode** drop-down list, located in the top right corner and select a filter: **All Input Fields**, **MLS Information**, etc. See *"Edit Mode Maintenance" on page 125*.

   Note: All of the red fields [ ] are required and must be completed in order to submit this form.

7. Enter as much information about the listing as you can.
   - press the ***TAB*** or ***ENTER*** key to move quickly from field to field.
8. Some free form text fields, such as **Remarks**, have a help icon [ ] that, when clicked, opens a dialog box with suggestions from the Board on what kinds of comments you should and should not enter in the field. For example, the field may be available for public usage and therefore, you should not enter any sensitive information such as security or alarm information.
9. To temporarily stop working on the listing (not posting it to the MLS), click the **Save as Incomplete** button. See *"Working with an Incomplete Listing" on page 114*.
   - a message dialog opens telling you the listing has been saved for later. Click **OK**. You are returned to the Listing Maintenance page.

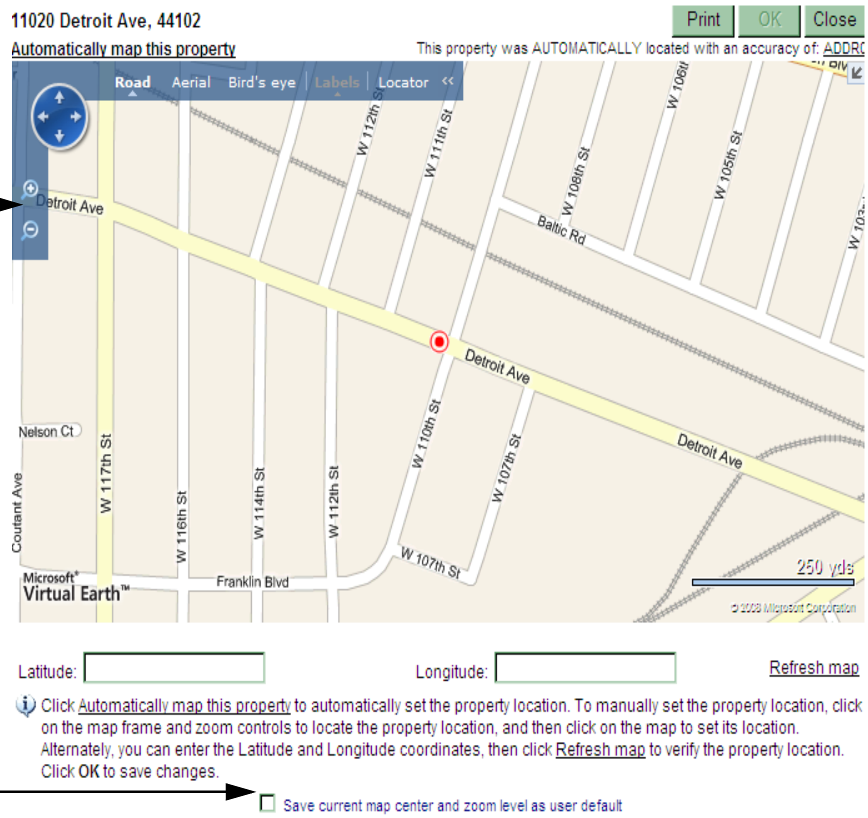
   Note: TEMPO 5 saves the listing as you move from field to field, so even if you lose your Internet connection, your listing will be saved as a temporary listing and you'll be able to complete it later.

10. Click one of the action buttons to perform more tasks:
    - **Map Property** — manually places the location of the property. See *"Using the Map Property Feature" on page 117*.
    - **Tax Autopop** — searches the public tax records and auto populates the fields with the listing's tax record information. See *"Using the Tax Auto-pop Feature" on page 118*.
    - **Save as Incomplete** — saves an unfinished record "as is" and lists it in the **Incomplete Listings** list on the main Listing Maintenance page. See *"Working with an Incomplete Listing" on page 114*.
    - **Print** — generates a selected listing report to print. See *"Printing" on page 265*.
11. When the listing is complete (all required fields are complete), click **Submit**.

Using the Map Property Feature

If TEMPO 5 notifies you that it is unable to accurately locate the property address of the new listing, the Map Property pop-up window is opened automatically so you can pinpoint the location manually. Also, you can click the **Map Property** button.

Click here to change the zoom level.



Click here to save current map center and zoom level as user default.

To use the Map Property feature:

1. From the Map Property pop-up window, click the **Automatically map this property** link.
2. If you need to manually locate the property and know the **Latitude** and **Longitude** coordinates, enter the information in the fields. Otherwise:
   - use the map view and zoom controls to locate the property, then click the map to place a property marker. The latitude and longitude values are automatically determined. See *"Mapping" on page 215*.
3. Select the **Save current map center and zoom level as user default** check box to save the map setting.
4. Click **Refresh map** to verify the property location.
5. Click **OK** to set the property location.

   You are notified when the listing has been successfully submitted to the MLS. It can now be searched for and seen by other MLS members.

6. Click **Print** to send the map to the printer. See *"Printing" on page 265*.
7. Click **OK**.

   The Listing Summary page opens.

Using the Tax Auto-pop Feature

If you did not use the tax autopop feature previously, but would like to now, click the **Tax Autopop** button from the *Adding a New Listing* page.

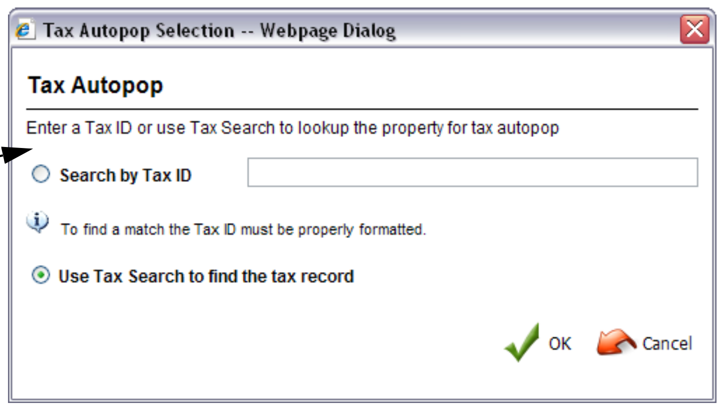
NOTE! *Depending on the provider you choose, the remaining fields that you need to complete in the dialog box may vary.*

To auto-populate the listing form with tax information:

1. Click the **Tax Autopop** button.

   The Tax Autopop Selection dialog box opens.

In this example there is only one tax provider and one county available. Therefore, the **Select Tax Provider** and **Select Tax County** drop-down lists are not visible.



2. Click the **Select Tax Provider** drop-down list and choose the provider. In the case of a single provider, this drop-down list is not visible.
3. Click the **Select Tax County** drop-down list and choose the county. In the case of a single county, this drop-down list is not visible.
4. Choose one of the following search options:
   - **Search by Tax ID** — enter the tax ID number required to locate the tax record (to retrieve a match, the ID must be properly formatted).
   - **Use Tax Search to find the tax record** — click **OK** to display the Tax Search Form. See *"Public Records" on page 199*.

   The Tax Search Results page opens.
5. Select the appropriate tax record, then click **OK**.

   The fields of the Add New Listing page are completed using the selected tax record information.

Editing an Existing Listing

NOTE! *If you are completing an Incomplete Listing record, see "Adding a New Listing" on page 114 or "Working with an Incomplete Listing" on page 114.*

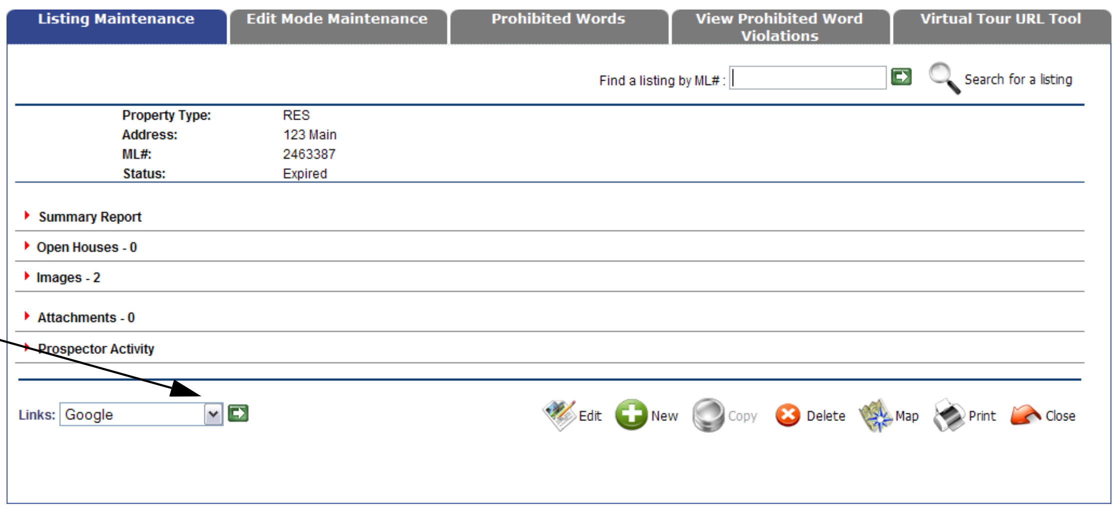
Once you have added a listing to the MLS database, you can search for that listing to edit, copy, delete, map or print the listing record. You can also add a new record from this page.

To search the MLS for an existing listing to edit:

1. From the Listing Maintenance page:
   - enter the listing's ML number in the **Find a listing by ML#** field, then click the arrow **[ ]** button.
   - click the **Search for listing** button, perform a search and select the record. Click the **Edit Selected Listing** button. See *"Using the Search Criteria Page" on page 68* and *"Editing an Existing Listing" on page 119*.

   The Listing record opens.

Click the drop-down list and select one of the available third-party service providers to use with the selected listing.



2. To view the listing's information, click each of the subsections: **Summary Report**, **Open Houses**, etc.
3. Click the **Links** drop-down list and choose a third-party provider to work with on the selected property listing. For example, select **Google**, then click the arrow button to open an advanced Google Search on the property.
4. Click the **Edit** button to modify the property listing's information at the field data level. Make changes to the listing accordingly. See *"Adding a New Listing" on page 114*.
5. Click **Close**.

Copying a Listing

You can take a copy of an existing property listing and create a new record.

To copy an existing listing:

1. From the Listing Maintenance summary page, click **Copy**.

   A message dialog opens prompting you to confirm that you want to create a new record by copying the selected record.

2. Click **OK** to confirm.

   The Copy Listing page opens showing the copied listing's property information.

3. Add the required listing information. See *"Adding a New Listing" on page 114*.
4. Click **Submit**.

   You are returned to the Listing Summary page.

Deleting a Listing

You can permanently delete an unwanted listing from the MLS database.

To delete a listing:

1. From the Listing Maintenance summary page, click **Delete**.

   A message box appears prompting you to confirm the deletion.

2. Click **OK**.

   A second message box opens, confirming the listing (by ML number) has been deleted successfully.

3. Click **OK**.

   You are returned to the Listing Maintenance page.

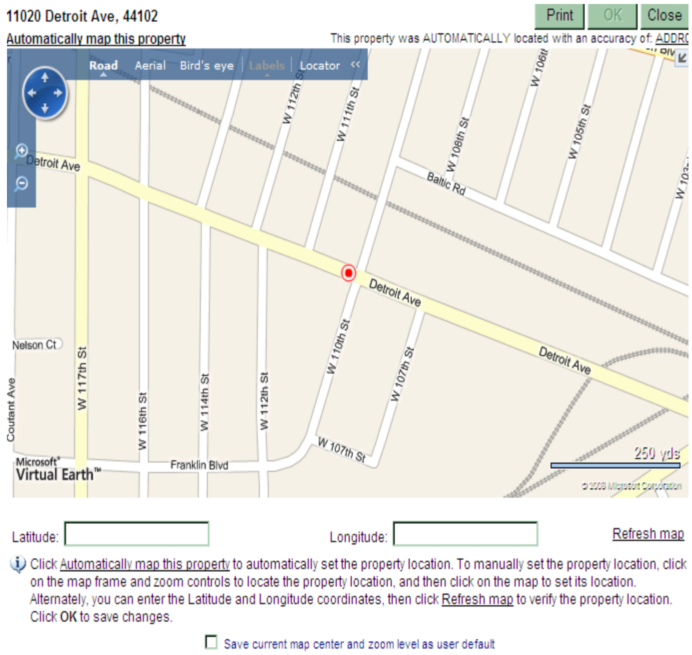
Mapping a Listing

You can view the listing property on a map and print it.

To view the currently displayed listing on a map:

1. From the Listing Maintenance summary page, click **Map**.

The Map Property pop-up window opens with the listing's location.



2. You can view the listing in different ways on the map. See *"Mapping" on page 215*.
3. Click the **Print** button to send the map to the printer.
4. If you use the mouse to click elsewhere on the map, thereby changing the location you want to view, click **OK** to accept the new position as the default.
5. Click **Close**.

Printing a Listing

You can preview and print one or more listing maintenance reports for the selected property.

To print a listing:

1. From the Listing Maintenance summary page, click **Print**.

   The Print Options dialog box opens.
2. Choose the following options:
   - **Single Maintenance Listing** — click the drop-down list to select a different listing than the one shown.
   - **All Maintenance Listings**
3. Click a print option:
   - **Print report**
   - **Print labels** (may not be available for all listing results)
4. Select a report format from the list.

- to select multiple reports, hold down the **CTRL** key and click.

5. Click **Preview**.

   You can see how the report will look before you print it.

6. Click **Save as PDF** to save the report in Portable Document Format. See *"Saving a Report as a PDF Document" on page 269*.

7. Click **Print**.

   A standard Windows Print dialog opens.

8. Choose any additional print options (e.g., number of copies, destination printer, etc.) then click **OK**. See *"Printing Listing Search Results" on page 274*.

Adding an Open House to a Listing

The Listing Maintenance module makes it easy to schedule upcoming open houses. Once added, other agents can search for and see the details of your open house(s).

To add an open house to a listing:

1. From the Listing Summary page, click **Open Houses** to expand the section.

2. Click the **Add an Open House** button.

   The Add New Open House page opens, with the related fields highlighted.

3. Enter the **Open House Type**, **Date**, **Time** and **Office Phone** information.

   Note: You can even indicate whether there will be refreshments served!

4. Click **Submit**.

   The Listing Summary page opens, showing the scheduled open house in the **Open Houses** section.

   *Note: If you schedule an open house which you later have to cancel, you can edit the open house record and change the **Status** to **Canceled**; or you can just delete it.*

Images

You can add, edit or change the order of images for property listings, as well as add descriptive text. See *"Managing Images" on page 293*.

To view the existing images for a selected listing:

1. From the Listing Summary page, click **Images** to expand the section.

2. Click on an image frame to highlight it.

3. Then do one of the following:

   - click the **Edit** link to change the image, its name or descriptive comment.
   - click the **Delete** link to permanently delete the image from the listing.

- click the **Reorder Image** arrows to change the selected image's position in the row.

4. Click **Save**.

Uploading Listing Attachments

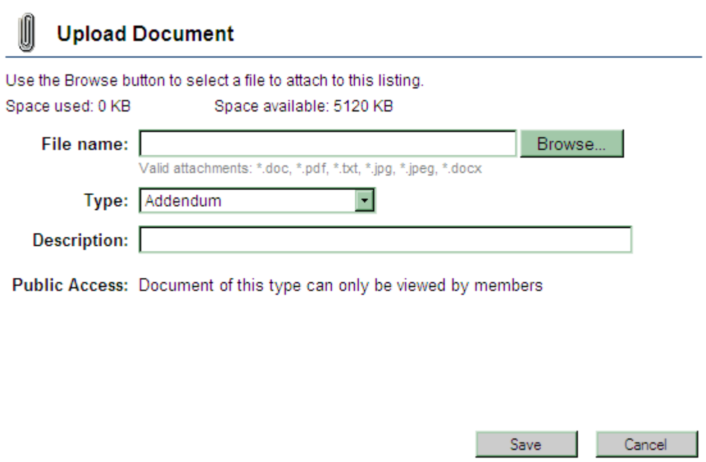
TEMPO 5 lets you upload files onto your computer and attach them to a specific listing. The size and types of files that can be uploaded are determined by MLS administrators.

NOTE! *Listing attachments can be seen by all MLS users from the Detailed Report view, so be careful not to upload any confidential documents.*

To upload a listing attachment:

1. From the Listing Summary page, click **Attachments** to expand the section.
2. Select **Add New Attachment** from the Action menu, then click the arrow button.

   The Upload Document dialog box opens.



3. Click the **Browse** button to select a file to attach to the listing.

   A Choose File dialog box opens.

4. Navigate to and select the file you want to upload, then click **Open**.
5. Select the attachment **Type** from the drop-down list box.

NOTE! *You can now attach valid movie file types (with extensions .mov, .wmv, .mpg, .mpeg, .avi, .mkv, .mlv, .mp2, .mp4, .mp2v, .mpa, .mpe).*

6. Enter a **Description** in the field.
7. Your MLS may allow certain types of attachments to be viewed by non-members. If this is the case, you can make the attachment visible to the public by setting the **Public Access** property. Otherwise, this property is not editable.
8. Click **Save**.

When the file is finished uploading, it will appear in the **Attachments** list on the Listing Summary page. You can edit or delete the attachment, if required.

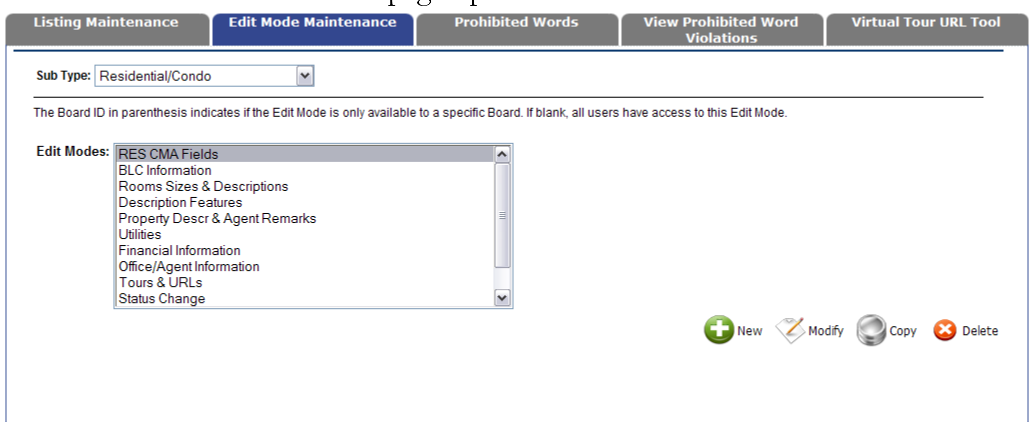
Edit Mode Maintenance

The Edit Mode Maintenance functionality in TEMPO 5 enables the user to manage the filters available from the **Edit Mode** drop-down list on the Add New Listing page. Each filter consists of specified fields and can be assigned exclusively to a particular Board, or be available to all users.

To access an existing Edit Mode filter:

1. In the **Listing Manager** section of the Tools page, click the **Edit Mode Maintenance** tab.

   The Edit Mode Maintenance page opens.



2. Click the **Sub Types** drop-down list and choose a category.

   The existing filters for the selected sub-type appear in the list box.

NOTE! *The filters are listed in the **Edit Mode** drop-down list on the Listing Maintenance page.*

3. Highlight a filter from the list, then click one of the action buttons:
   - **Modify** — lets you select a Board ID and manage the fields included in the filter.
   - **Copy** — lets you take a copy of an existing filter and rename it.
   - **Delete** — lets you remove a filter from the category list.

To add a new Edit Mode filter:

1. From the Edit Mode Maintenance page, click the **New** button.
2. In the **Edit Mode Name** text box, type a name.
3. Click the **Board ID** drop-down list and select a board's ID <u>only if</u> you want to assign exclusive use to that board; otherwise, leave the field blank.
4. From the **Available items** list, select one or more fields and click the right arrow to move them to the **Selected items** list.
   - use the up/down arrows to arrange the field order you want.
5. Click **OK**.

Prohibited Words

The Board can enter and maintain a list of prohibited words and phrases that comply with the Fair Housing Rules. The words or phrases can be flagged as a warning (which can be saved to the MLS); or as a stop-word (which cannot be saved to the MLS).

To enter a list of prohibited words:

1. In the **Listing Manager** section of the Tools page, click the **Prohibited Words** tab.

   The Prohibited Word page opens.
2. Enter the words or phrases in the following text boxes:
   - **Warning Words or Phrases** — these entries will receive a warning, and can be saved to the MLS database.
   - **Stop Words or Phrases** — these entries will be stopped, and cannot be saved to the MLS database.
3. You can click the **Paste from Clipboard** link to enter words in this fashion.
4. Click **Save**.
5. Select the **Enable the Prohibited Word check** check box to enable this feature.

To view all listings that contain the violations:

- In the **Listing Manager** section of the Tools page, click the **View Prohibited Word Violations** tab.

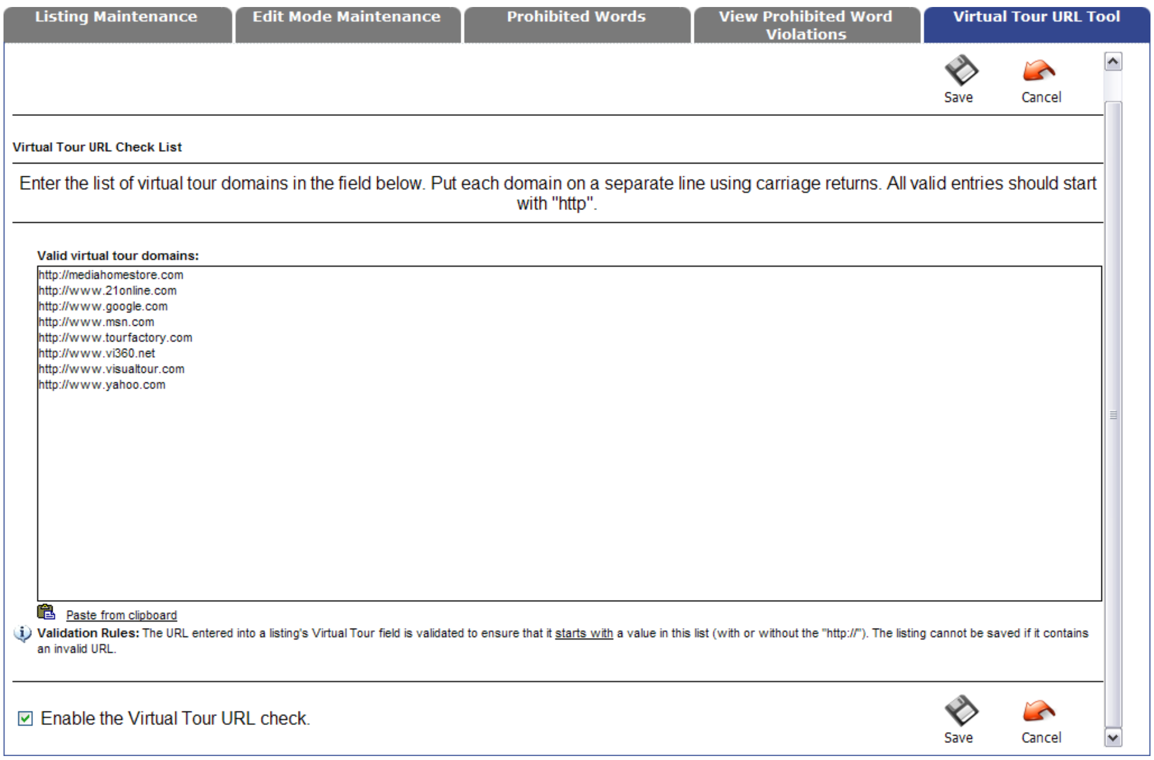
Virtual Tour URL Tool

This tools lets MLS staff maintain a list of approved Virtual Tour sites. Enter each URL on a separate line (followed by a hard return, that is, press ***ENTER***). Use the proper format http:// as all invalid domains cannot be saved.

To add an allowable Virtual Tour URL to the list:

1. From the Tools page sidebar, click **Listing Manager**, then click the **Virtual Tour URL Tool** tab.

   The Virtual Tour URL page opens.



2. On a new line at the bottom of the list, type the URL for a virtual tour tool, then press ***ENTER***; or if you have cut or copied URL information to the clipboard, click the **Paste from clipboard** link to paste the information.

   *Note: When pasting from the clipboard for the first time during the session, you will be prompted by a dialog box to give access to your clipboard. Click the **Allow Access** button to proceed. Access only needs to be granted once. You can continue pasting (**CTRL+V**).*

3. Select the **Enable the Virtual Tour URL check** option to ensure your URLs are entered correctly with the proper prefix (http://).

   Note: An invalid URL cannot be saved. You will be prompted to correct the URL.

4. Click **Save**.

E-Mail Messages

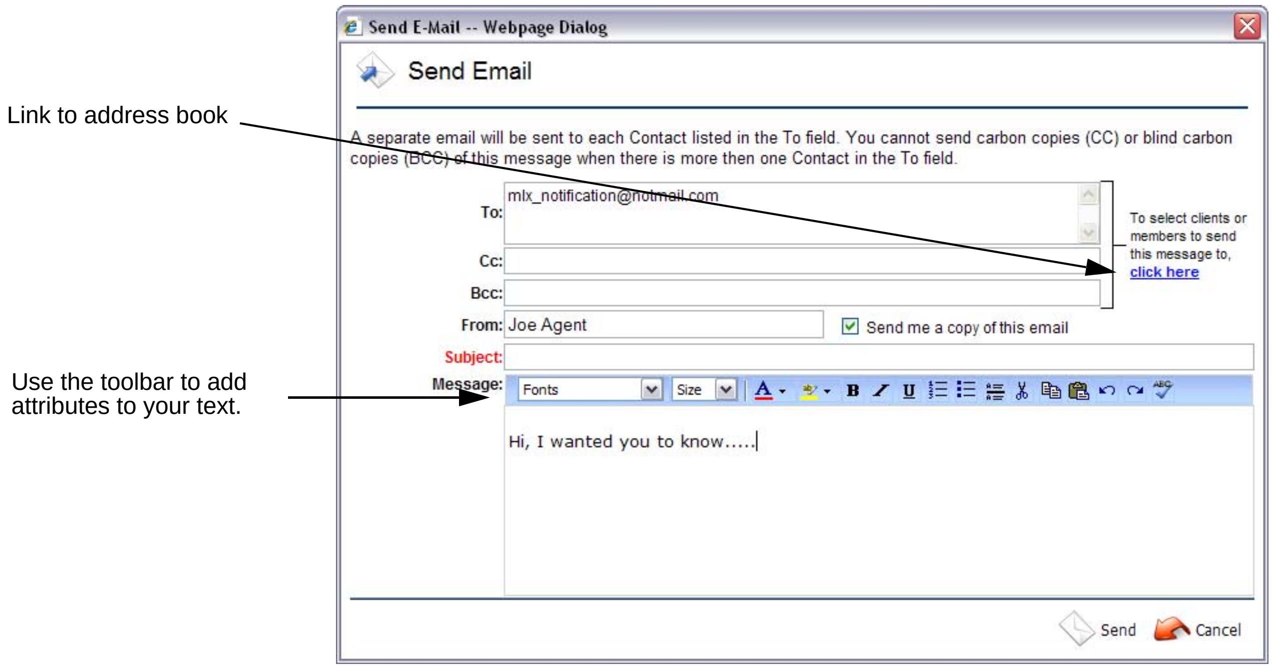
Sending E-mail

You can send an e-mail message to any number of contacts and members from a Search Results page, the Contact Manager or directly from a Contact/Member Record. In addition, you can e-mail a link to the client gateway, so the contact can access your personalized web site to view listings.

To send an e-mail:

1. From a page within TEMPO 5, click the **E-mail** action button.

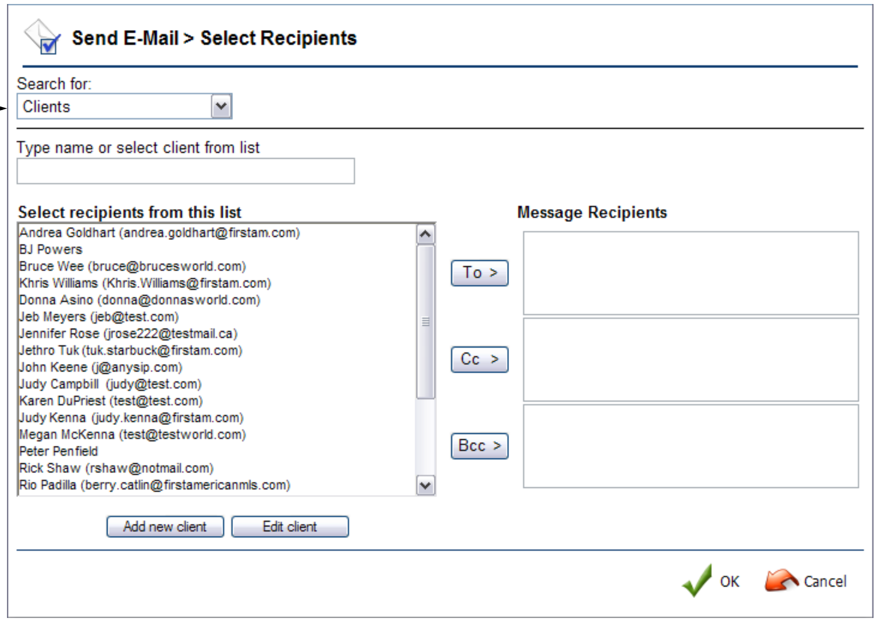
   The Send E-Mail page opens.



2. Enter an e-mail address in the **To, Cc**, or **Bcc** fields.
3. Click the **[click here]** link to the right of the address fields to select any additional recipients to whom you want to send the message. (Alternatively, you can simply type additional e-mail addresses in the appropriate field, separated by semi-colons.)

The Select Recipients page opens.

Click the drop-down list and specify **Clients** or **Members** as the types of recipients you want to search for.



4. Choose the kind of e-mail address records you want to **Search for: Clients** or **Members**.
5. If you are looking for client addresses, you can quickly locate a client by typing their name in the field.
   - if you are looking for an MLS member, you must enter at least two letters of their first and last name, or office code, then click **Find**.
6. Select a contact from the list, then click either **To**, **Cc**, or **Bcc** to add them to the appropriate address field under **Message Recipients**.
   - to select multiple contacts, hold down the ***CTRL*** or ***SHIFT*** key while you click.

NOTE! *Cc means "Carbon Copy" and Bcc means "Blind Carbon Copy." When sending a single e-mail, a Bcc recipient is not visible to the main message recipient. However, you cannot use these fields when there are multiple addresses in the* ***To*** *field.*

7. Click the **Add new client** button to enter a new client record to the database. See *"Adding a New Contact" on page 58*.
8. Click the **Edit client** button to modify an existing recipient's client record. See *"Editing Contact Information" on page 52*.
9. Click **OK** to accept the Message Recipients and return to the Send E-mail page.
10. Select the **Send me a copy of this e-mail** check box to enable this feature.
11. Type the message's **Subject**.

    Note: This is a required field, marked by an asterisk.
12. Type the body of the e-mail in the **Message** box.
13. Use the E-mail Editor to apply text attributes to the message:

- **Fonts** — click the drop-down list and select one of the available font styles, for example **Arial**, **Times New Roman**, etc.
- **Size** — click the drop-down list and select the font size (in points), for example, **8pt**, **10pt**, **12 pt**, etc.
- **Font Color** — click the down arrow to open the Color palette, letting you select a color to apply to selected text. Highlight the text you want to apply color to, then click the **Font Color** icon.
- **Back Color** — click the down arrow to open the Color palette, letting you select a color to apply to selected text as a background highlight. Highlight the text you want to highlight, then click the **Back Color** icon.
- **Bold, Italic, Underline** — highlight the text you want to format, then click the corresponding toolbar icon.
- **Numbered** — place the cursor where you want to begin a numbered list (1, 2, 3, etc), then click this icon.
- **Bullet** — place the cursor where you want to begin a bulleted list, then click this icon.
- **Insert Line** — place the cursor in the message, then click the icon to insert a line.
- **Cut, Copy, Paste** — highlight the text you want to cut or copy, then click the corresponding toolbar icon. Place the cursor in the message to insert text, then click the **Paste** toolbar icon.
- **Undo, Redo** — click one of the toolbar icons to undo an action or to redo an action. For example, if you cut a chunk of text from the message, then changed your mind, click the **Undo** toolbar icon to reverse the action.
- **Spell Check** — click the **Spell Check** icon to search for spelling errors in the message.

NOTE! *Disclaimer text may be added to the end of your e-mails. This text is maintained by your office manager and cannot be removed. See* *"Entering an E-mail Disclaimer" on page 47*.

14. Click **Send**.

    A message box notifies you when the e-mail has been successfully sent.

NOTE! *To view, forward, or delete messages that you have sent, open the Contact Record and click the **Email History** tab.*

Sending E-mail from the Contact Manager

From the Contact Manager page, you can send an e-mail to a selected contact in the list; or you can select multiple contacts and send a mass e-mail to all of them. See *"Sending E-mail to Contacts" on page 53*.

To send a single e-mail:

1. From the Contact Manager page, select an e-mail recipient from the list.
2. Using the mouse, point to the Information icon to display the Quick Access menu, and click **E-mail**.

   The Send E-Mail page opens.
3. Follow the instructions in the previous topic. See *"Sending E-mail" on page 130*.

To send multiple e-mails:

1. From the Contact Manager page, select multiple e-mail recipients from the list.
2. Click the **Email** Action button at the bottom of the page.

   The Send E-Mail page opens with the clients' e-mail addresses in the **To** field, separated by semi-colons.
3. Follow the instructions in the previous topic. See *"Sending E-mail" on page 130*.

Sending E-mail from an Open Contact Record

You can send an e-mail to a contact directly from their opened contact record. Click the **Email** button from the **Contact Info** tab, or click the **Compose Email** button from the **Email History** tab. In addition, you can view and forward previously sent e-mails from the **Email History** tab, send a CMA or Client Gateway link via e-mail from the corresponding tabs. See *"Sending E-mail to Contacts" on page 53*.

Deleting E-mail

When you delete an e-mail from TEMPO 5, you do so from the contact record.

To delete e-mail messages from the contact record:

1. Click the **Email History** tab.
2. Select one or more messages in the list.
3. Click the **Delete Selected** button from the footer bar.

   A message dialog appears, prompting you to confirm the deletion.
4. Click **OK** to continue.

E-mailing Listing Reports

When you send a listing report to a client via e-mail, you are actually sending a link to the live MLS listing information. This means that your clients will always be looking at the most current information available and can see any price or status changes immediately.

To e-mail one or more listing reports:

1. From the Search Results page, select one or more property listings
2. Click the **Email** action button.

   Note: You can also e-mail a listing report while viewing the listing details.

   The E-mail Options dialog opens.
3. Select the property listings you want to send:
   - **Single Record** — select a property from the drop-down list, which becomes available when this option is selected.
   - **Selected Records** — choose this option if you have already selected the listings from the Search Results page. The number appended to the option tells you how many have been selected.
   - **All Visible Records** — this option selects just those listings that are currently displayed on the Search Results page. You may have applied one or more filters to narrow the list, which could affect which listings are visible. The number appended to the option tells you how many listings are visible.
4. Select how the e-mail recipients will view the listing report when they receive it:
   - **Send link to selected property report(s)** — click this option button, then select one or more reports from the list. The link to the specified reports is sent in the email message.
   - **Send link to Client Gateway**
5. Click **OK**.

   The Send E-mail dialog opens.
6. Follow steps # 3 - 10 in *"Sending E-mail" on page 130*.

NOTE! *Do not delete the link in the message box. It is the link to the properties. You can move it, but do not delete it. Also note that disclaimer text may be added to the end of your e-mails. This text is maintained by your office manager and cannot be removed.*

7. Click **Send**.

   You are notified when the e-mail message has been successfully sent.

NOTE! *To view, forward, or delete messages that you have sent, open the Client Record and click **E-mail History**.*

E-Mailing CMAs

When you send a Buyer Presentation or Seller CMA to a client via e-mail, you are actually sending a link that your clients can open in a Browser. See *"E-Mailing CMAs" on page 135*.

To e-mail a CMA:

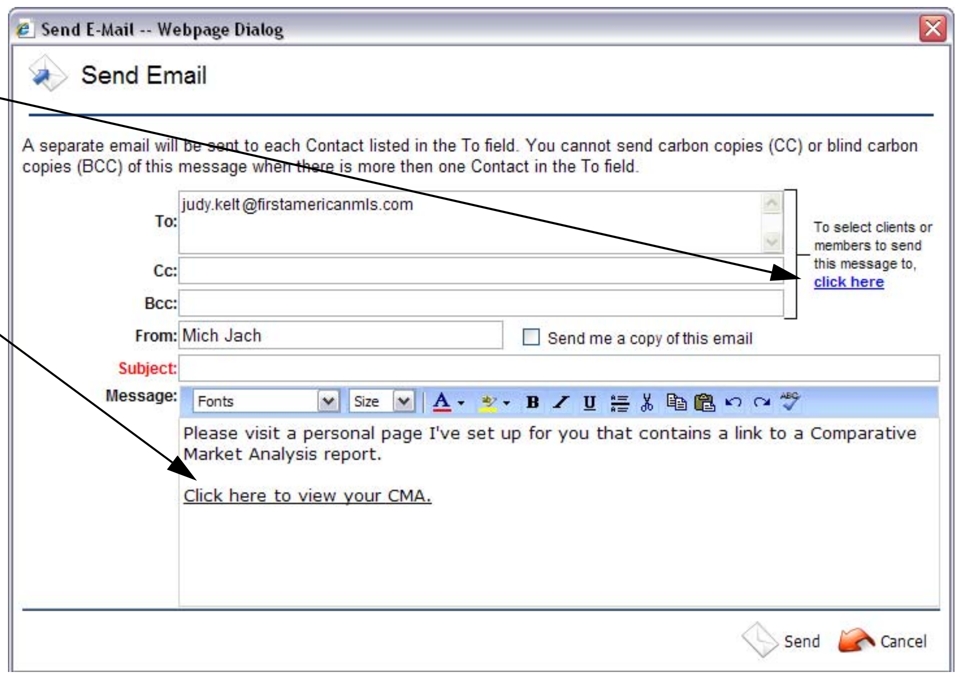
1. From the CMA Manager page, click an existing CMA to open it.

   The CMA Wizard opens.
2. From within the CMA Report Wizard, click step #8 — **View Report**, to go to the last page.
3. Click the **E-mail** button.

   The Send E-mail page opens.

Link to address book

Link to properties must appear in the message



The e-mail is automatically addressed to the client that the CMA presentation is linked to.

NOTE! *Cc means "Carbon Copy" and Bcc means "Blind Carbon Copy." Bcc recipients are not visible to other message recipients.*

4. Click the link to the right of the address fields to select e-mail addresses from your personal TEM PO 5 address book.
   - alternatively, you can simply type e-mail addresses in the appropriate field, separated by semi-colons.

   Your address book contains the e-mail addresses of any clients you have previously entered, plus e-mail addresses for other members of your MLS.

The Select Recipients dialog opens.

5. Choose the kind of e-mail address records you want to **Search for**: **Clients** or **Members**. See *"Sending E-mail" on page 130*.
6. Select the contacts in the list that you want to send the e-mail message to and click either **To**, **Cc**, or **Bcc** to add them to the appropriate address field.
   - select multiple contacts by holding down the ***CTRL*** or ***SHIFT*** key while you click.
7. Click **OK**.

   The selected contacts are added to the list of e-mail recipients. You are returned to the Send E-mail window.
8. Enter the **Subject** of the e-mail.
9. Make any changes to the **Message** that you want.

NOTE! *Do not delete the line in the message box that begins with "http." It is the link to the CMA. You can move it, but do not delete it.*

10. Click **Send**.

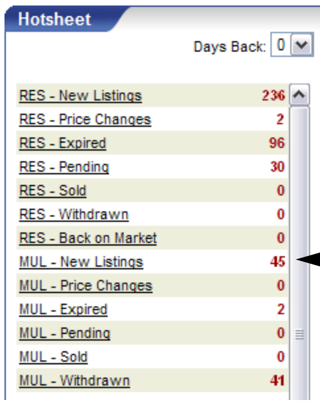
    You are notified when the e-mail message has been successfully sent.

NOTE! *To view, forward, or delete messages that you have sent, open the Contact Record and click the **Email History** tab. S*

Hotsheets

Viewing Today's Hotsheet Summary

Hotsheets alert you to changes in the market, such as when a new property is listed, or when a listing's price or status changes. You can see a quick summary of Today's Hotsheet activity from the Home page, up to two days back.



The number of matches for each Hotsheet is listed. This summary is based on your saved Hotsheet criteria.

Using the Hotsheet Links

Each link displayed in the **Hotsheet** section of the Home page represents the number of matches (search results), based on your saved Hotsheet search criteria.

To use the Hotsheet summary area of the Home page:

- Click the **Day's Back** drop-down list and select **1** or **2** to see the changes to Hotsheet activity since yesterday or the day before.

  Note: Zero (0) is today and is the default setting.

  The number of matches is displayed.
- Click a link to go directly to a list of search results. For example, if you click **MUL New Listings** (45), TEMPO 5 loads the entire list of expired listings matching the last search criteria, so you can look at the details. See *"Working with Hotsheet Results" on page 141*.
- Click the **Change my criteria** link to modify the search criteria upon which the search results are based.
- Click **Refresh** at any time to update the Hotsheet search, whether you have changed the search criteria or just want to get the latest numbers.

Using the Hotsheet Search Criteria Page

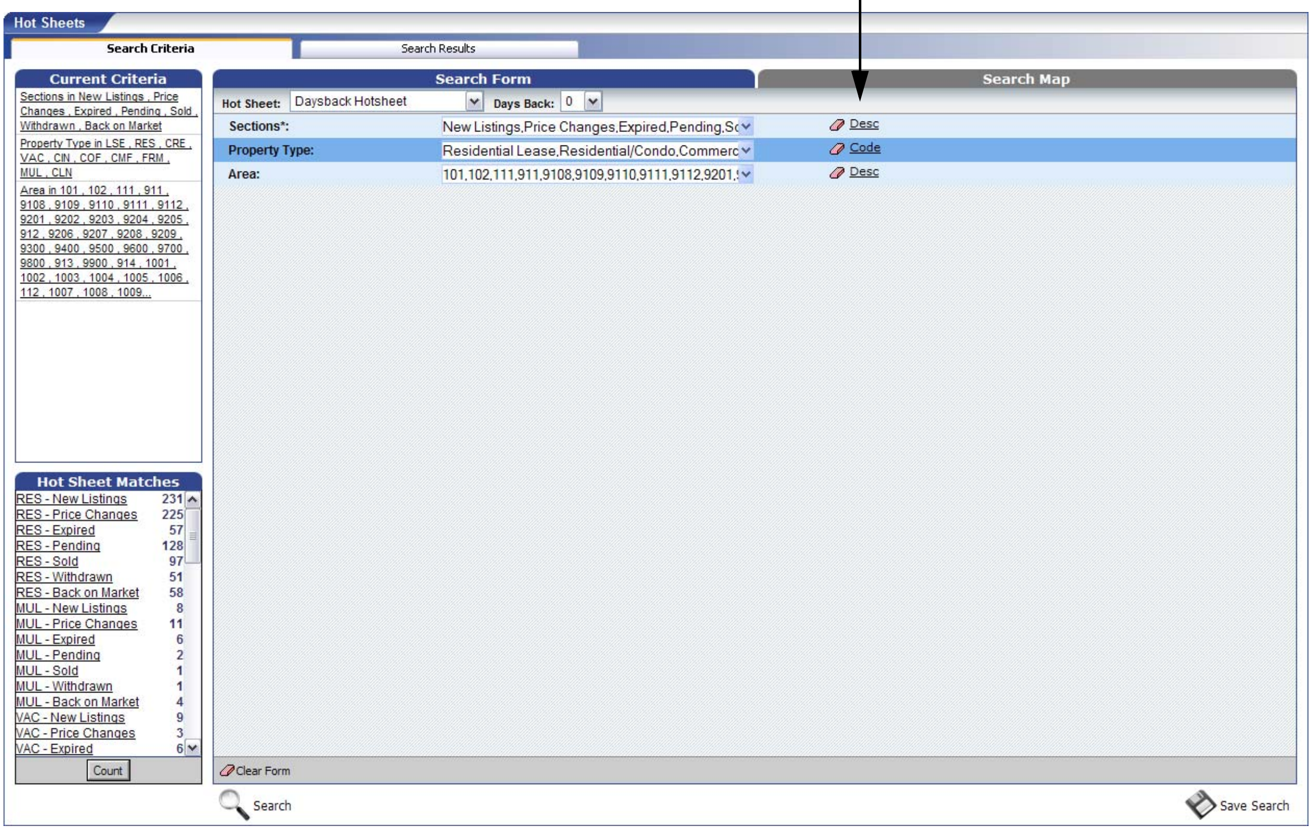
Using the Hotsheet search function is similar to performing a regular search, but with fewer features.

To access the Hotsheets Search Criteria page:

- Do one of the following:
  - from the main menu, click **Hotsheets**; or
  - from the Home page, click **Change my criteria** from the **Hotsheet** section.

  The Hotsheet Search Criteria page opens.

Click the short **Code** link to switch to the long **Desc** of the criteria.



Running a Hotsheet Search

There are two ways to create Hotsheet reports; by specifying new search criteria or by loading previously saved search criteria.

To run a Hotsheet report search using previously saved criteria:

1. From the Hotsheet Search Criteria page, click the **Hotsheet** drop-down list and choose a report type you want to work with:

- **Daysback Hotsheet** — tracks changes to the market from today up to 30 days back. Click the **Days Back** drop-down list and select from **0** to **30**.
- **Personal Hotsheet** — tracks changes to the market since the last time you ran this search. The date and time of the last time you ran this search is displayed.
- **Previous Personal Hotsheet** — this option only appears after you have done two personal hotsheet searches. It shows you the most recent previous personal hotsheet information.
- **Date Range** — tracks changes to the market in the last 30 days.
- **Custom Search** — tailor a more specific search, based on a specified **Property Type** (such as Residential, Business, Rental, etc.) and **Search template**.

The corresponding Hot Sheet Search Criteria page opens, displaying the previously saved search criteria. Also, look to the sidebar to view the **Current Criteria** section (a summary of currently specified search criteria) and the **Hot Sheet Matches** section.

2. Click the **Search** button or the **Results** tab to perform the search.

   The Search Results page displays a grid of matching listings.

3. Proceed to *"Working with Hotsheet Results" on page 141*.

To run a Hotsheet report search using new search criteria:

1. From the Hotsheet Search Criteria page, click the **Hotsheet** drop-down list and choose a report type you want to work with.

   The Hot Sheet Search Criteria page opens, displaying the previously saved search criteria.

2. Enter new or revised search criteria in the fields. For information on using pick lists, etc., see *"Field Related Controls" on page 19*.
3. Click the **Search Map** tab to perform a Hotsheet search using the mapping function. See *"Searching by Map Area" on page 221*.
4. Click the **Count** button.

   The **Hotsheet Matches** section, located on the left side, displays the number of matching listings for each section.

5. Click the **Save Search** button to save the search criteria for reuse (not available for the Custom Search).
6. Click the **Search** button or the **Results** tab.

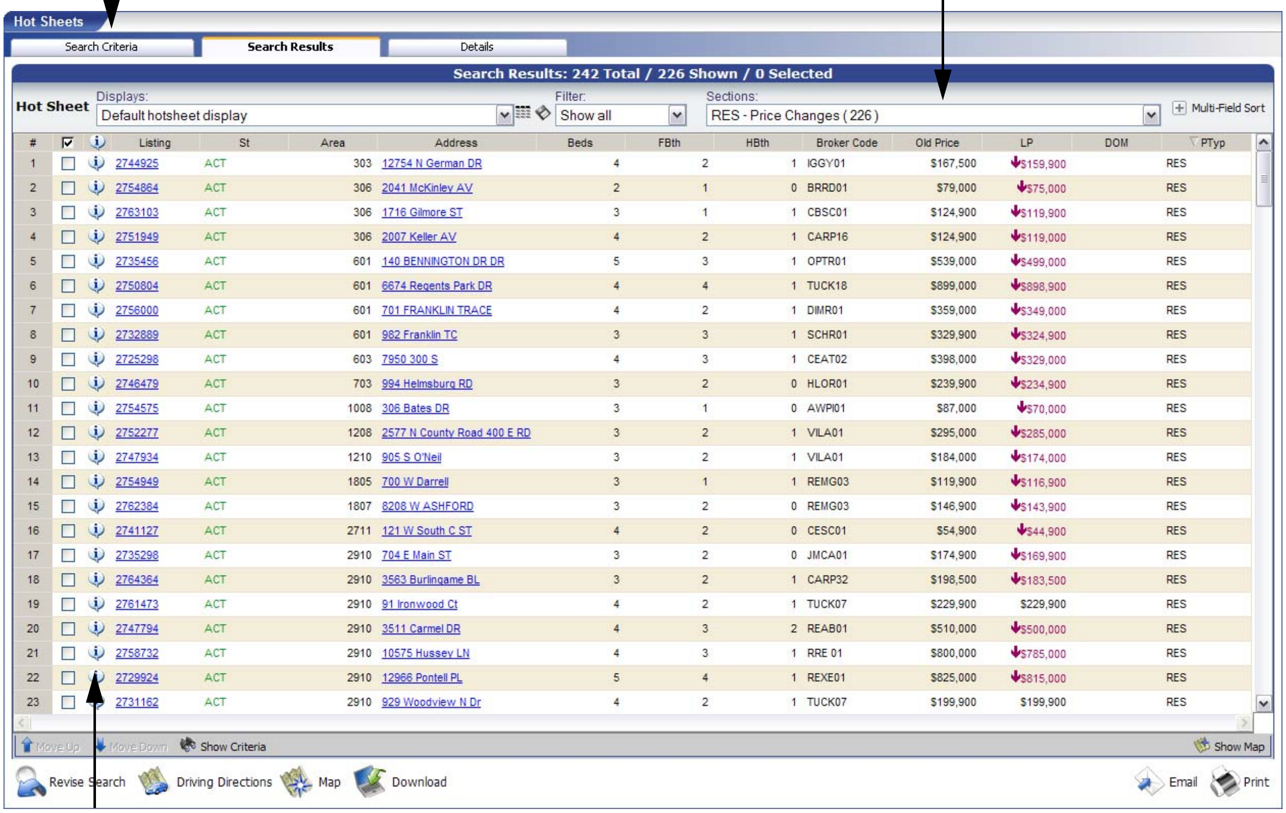
Working with Hotsheet Results

The Hotsheet Results page is similar to the Search Results page. You can perform many of the same actions, such as sending e-mail, generating a map view, and printing reports. You can also perform different actions, such as working with property history, accessing tax records, etc.

The list of results on the Hotsheets Results page can be quickly and easily sorted, rearranged, and filtered to display the information in the manner that best suits your needs. See *"Viewing, Sorting and Filtering" on page 22*.

Click here if you want to change the criteria and run a new Hotsheet search.

Click here to display all matches of a **Section** category.



#	Listing	St	Area	Address	Beds	FBth	HBth	Broker Code	Old Price	LP	DOM	PTyp
1	2744925	ACT	303	12754 N German DR	4	2	1	IGGY01	$167,500	$159,900		RES
2	2754864	ACT	306	2041 McKinley AV	2	1	0	BRRD01	$79,000	$75,000		RES
3	2763103	ACT	306	1716 Gilmore ST	3	1	1	CBSC01	$124,900	$119,900		RES
4	2751949	ACT	306	2007 Keller AV	4	2	1	CARP16	$124,900	$119,000		RES
5	2735456	ACT	601	140 BENNINGTON DR DR	5	3	1	OPTR01	$539,000	$499,000		RES
6	2750804	ACT	601	6674 Regents Park DR	4	4	1	TUCK18	$899,000	$898,900		RES
7	2756000	ACT	601	701 FRANKLIN TRACE	4	2	1	DIMR01	$359,000	$349,000		RES
8	2732889	ACT	601	982 Franklin TC	3	3	1	SCHR01	$329,900	$324,900		RES
9	2725298	ACT	603	7950 300 S	4	3	1	CEAT02	$398,000	$329,000		RES
10	2746479	ACT	703	994 Helmsburg RD	3	2	0	HLOR01	$239,900	$234,900		RES
11	2754575	ACT	1008	306 Bates DR	3	1	0	AWPI01	$87,000	$70,000		RES
12	2752277	ACT	1208	2577 N County Road 400 E RD	3	2	1	VILA01	$295,000	$285,000		RES
13	2747934	ACT	1210	905 S O'Neil	3	2	1	VILA01	$184,000	$174,000		RES
14	2754949	ACT	1805	700 W Darrell	3	1	1	REMG03	$119,900	$116,900		RES
15	2762384	ACT	1807	8208 W ASHFORD	3	2	0	REMG03	$146,900	$143,900		RES
16	2741127	ACT	2711	121 W South C ST	4	2	0	CESC01	$54,900	$44,900		RES
17	2735298	ACT	2910	704 E Main ST	3	2	0	JMCA01	$174,900	$169,900		RES
18	2764364	ACT	2910	3563 Burlingame BL	3	2	1	CARP32	$198,500	$183,500		RES
19	2761473	ACT	2910	91 Ironwood Ct	4	2	1	TUCK07	$229,900	$229,900		RES
20	2747794	ACT	2910	3511 Carmel DR	4	3	2	REAB01	$510,000	$500,000		RES
21	2758732	ACT	2910	10575 Hussey LN	4	3	1	RRE 01	$800,000	$785,000		RES
22	2729924	ACT	2910	12966 Pontell PL	5	4	1	REXE01	$825,000	$815,000		RES
23	2731162	ACT	2910	929 Woodview N Dr	4	2	1	TUCK07	$199,900	$199,900		RES

Using the mouse, point to the Information icon to display the Quick Access menu.

Click anywhere on a row to expand the item and see a preview of its information. Click the row again to hide the preview.

To change the Hotsheet Search Results view:

1. From the Search Results page, you can change the list view by:
   - clicking on a row to see an expanded preview of the listing details, including a thumbnail image of the property. Click the same row again to close.
   - clicking a column header to sort the list in ascending or descending order.
   - dragging and dropping a column header to a new location to rearrange the column order. See *"Reordering Columns" on page 23*.

- clicking the [+] **Multi-Field Sort** button to **Sort by** three levels of criteria as selected from the drop-down lists. See *"Viewing, Sorting and Filtering" on page 22*.

2. Click the **Displays** drop-down list and choose a layout in which to view different columns of information.
   - click the [▪] icon adjacent to the drop-down list to open the Column Manager, should you want to select a different display format. See *"Column Manager" on page 317*.
   - click the **Save Grid** [ ] icon to save any changes you made to the column grid.

TIP ... To clear an applied filter and see all records, choose Show all from the Selection list and All from the Status list.

3. To filter the list by record selection, select any number of records from the list. Click the **Filter** drop-down list and select an option:
   - **Show all** — all records are displayed.
   - **Show selected** — only the selected records are displayed.
   - **Show unselected** — only the records that are not selected are displayed.
4. Click the **Sections** drop-down list and choose one of the Hotsheet sections, for example, **Pending Listings**.

   *Note: The items appearing in the **Sections** list are determined by the criteria you specified in the **Sections** field of the hotsheet Search Criteria page. See "Using the Search Criteria Page" on page 68.*
5. Select a record, then click the **Move Up/Move Down** buttons on the footer bar to reorder the records. See *"Footer Bar Controls" on page 22*.
6. Click the **Show/Hide Criteria** button on the footer bar to view a summary of the search criteria without leaving the Search Results page. A preview pane opens.
7. Click the **Show Map** button on the footer bar to display a resizable, split screen view of the results grid with a map view. See *"Using the Search Map Page" on page 74*.
8. Click on a record's **Listing#** or **Address** hyperlink to view the property on a map.
   See *"Viewing a Map of Listing Search Results" on page 223*.
9. Select a record, then point to the Information icon to display the Quick Access menu commands: **Report**, **Tax**, **Property History**, **Images**, **Map**, **Edit**, **E-mail**, **Financial Calculators**, etc.

   Note: These options may vary depending on your area and availability.
10. Select one or more records, then click on an Action button to perform more tasks:
    - **Revise Search** — opens the Search Criteria page, where you can modify the search criteria. See *"Using the Search Criteria Page" on page 68*.
    - **Driving Directions** — to plan a route to multiple properties. See *"Creating Driving Directions" on page 225*.
    - **Map** — to see a map view of the selected properties. See *"Viewing a Map of Listing Search Results" on page 223*.

- **Download** — to export the selected hotsheet data. See *"Exporting Hotsheet Data" on page 334*.
- **E-mail** — lets you select properties and reports, including all hotsheet sections at once, to send via E-mail. See *"Sending E-mail" on page 130*.
- **Print** — lets you print a list of property search results (as seen on the page). See *"Printing Listing Search Results" on page 274*.

*Note: To print the actual listing details, select **Print** from the Search Results page. See "Printing" on page 265.*

11. Proceed to *"Viewing Hotsheet Details" on page 144*.

Viewing Hotsheet Details

NOTE! *If you want to view just one property record, point to the listing's Information icon on the Hotsheet Search Results page and click the **Report** icon from the Quick Access menu. The item appears in a pop-up window that you can keep open while you continue to work in TEMPO 5. From this window, you can view and **Print** a variety of detailed reports.*

To view the Hotsheet details for a selected listing:

1. From the Hotsheet Results page, select one or more listings you want to view.

   Note: To view all properties, do not select any.

2. Click the **Details** tab.

   The Hotsheet listing details page opens.

3. To view different types of data for the selected listing(s), click the Quick Link Button Bar icons: **Images**, **Virtual Tour/Links**, **Tax** (if available in your area), **Map**, **Directions**, **Report Data Error**, etc.

4. Click the **View** drop-down list, located in the top right corner, to see the listing information using a different report format.

   Note: Your favorite reports are shown at the top of the list and are highlighted in yellow. To set up your favorite reports, see *"Choosing Your Favorite Reports" on page 46*.

5. To scroll through the previous and next selected listing, click the left and right arrow buttons [] at the top of the page. Alternatively, you can go directly to a particular report page by selecting it from the drop-down list in the top left corner of the page.
6. Click an action button to perform further actions:
   - **Email** — use the Send E-mail pop-up dialog to select properties to send via e-mail. See *"Sending E-mail" on page 130*.
   - **Print** — use the Print dialog box to choose the report printing options. See *"Detailed Hotsheet Reports" on page 279*.
7. To return to the Search Results page, click **Back to List**.

CMA Manager

Working with the CMA Manager

TEMPO 5's Comparative Market Analysis (CMA) feature lets you create:

- attractive, graphical reports analyzing a seller's property.
- presentations for your buyers.

All reports and presentations can be quickly and easily e-mailed to your clients.

To display the CMA Manager reports list:

1. From the main menu, click **Reports > CMA Manager**.

   The CMA Manager page opens, displaying a list of all existing seller CMAs and buyer presentations.

2. From the CMA Manager page, you can change the list view by:
   - clicking the **Display** drop-down list to filter the list. See *"Viewing, Sorting and Filtering" on page 22*.
   - clicking on a row to open the CMA.
   - clicking a column header to sort the list in ascending or descending order. See *"Viewing, Sorting and Filtering" on page 22*.

- dragging and dropping a column header to a new location to rearrange the column order. See *"Reordering Columns" on page 23*.

3. Type the name, or first few letters of a name, in the **Search by contact** field, then click the **Search** button.

   The presentations matching the selected name, or first few letters, are displayed in the list.

   - click the **Restore** button to display the entire list.

4. To select CMAs for a single contact, you can also select the contact's name from the drop-down list at the top right of the CMA Manager. You can toggle how the client list is sorted (by first or last name) by clicking the resort name button [

   ].

5. Select one or more unwanted CMAs in the list, then click the **Delete Selected** button in the footer bar.

   - A message box appears, asking you to confirm deletion. Click **OK**. See *"Deleting a CMA" on page 151*.

6. Select a CMA in the list, then click an Action button to perform more tasks:

   - **Open CMA** — view or edit the selected CMA presentation. See *"Opening or Editing a CMA" on page 149*.

   *Note: Clicking on a row in the list is the same as using the **Open CMA** Action button. It allows you to view or edit an existing CMA report.*

   - **Copy CMA** — creates a copy of a CMA report you want to duplicate, while keeping the original intact. See *"Copying a CMA" on page 150*.

7. Click the **New CMA** button to create a new Buyer or Seller CMA. See *"Creating a New CMA" on page 152*.

8. Click the **CMA Presentation Library** button to open the CMA presentation library of default report pages. See *"CMA Presentation Library" on page 169*.

Opening or Editing a CMA

You can open and edit a selected CMA report at any time from the CMA Manager. Simply click a presentation in the list; or select a presentation, then click the **Open CMA** button.

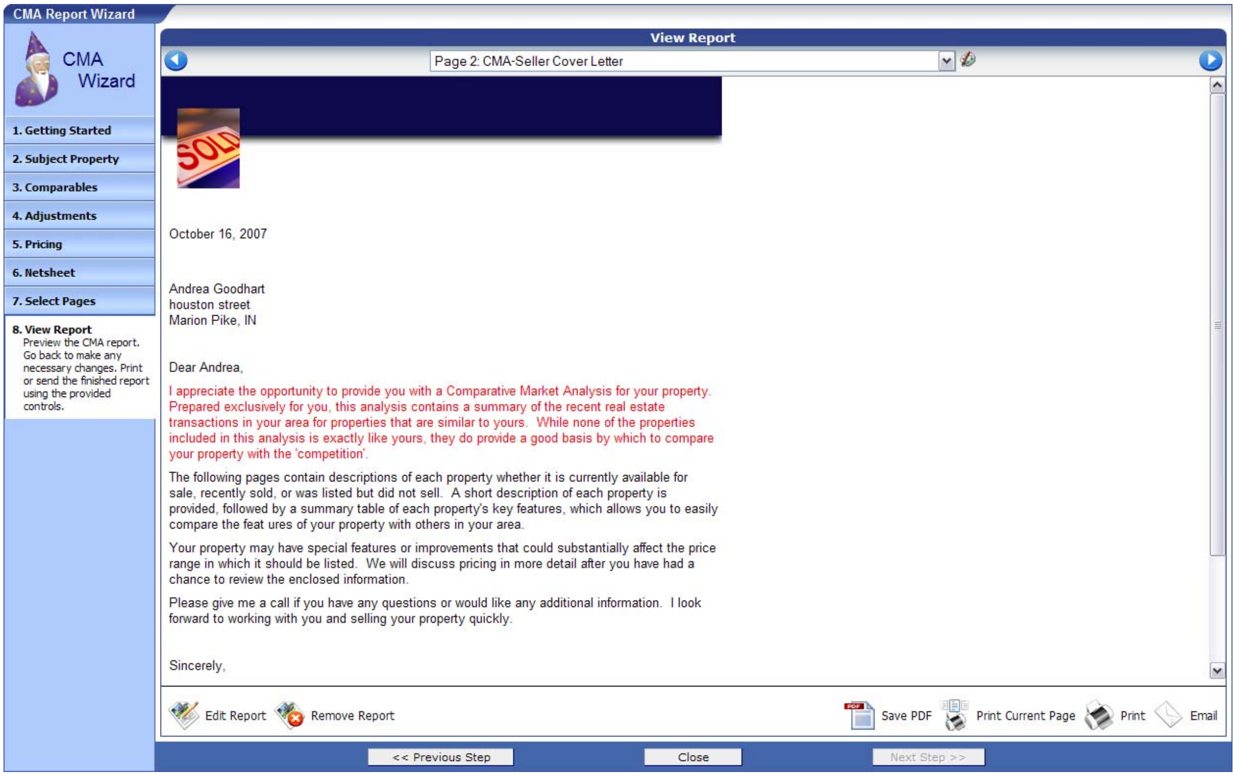
To view or edit a CMA presentation:

1. From the CMA Manager page, click a CMA presentation report in the list.

   Note: You can only edit one report at a time.

   The CMA Wizard page automatically opens after the last fully completed step of the presentation. For example, if you started a new CMA, getting as far as step #3 — Adding Comparable properties, the wizard opens at the next step that needs to be completed.

2. Click one of the CMA Wizard's numbered steps to edit a specific area of the existing CMA.



3. Make changes to the property information as required. Follow the instructions given in *"Creating a New CMA" on page 152*.
4. Depending on which page you are on, click **Save**.
5. Click **Close** to return to the CMA Manager.

Copying a CMA

To make a copy of a buyer or seller CMA while keeping the original intact, use the **Copy CMA** Action button on the CMA Manager page.

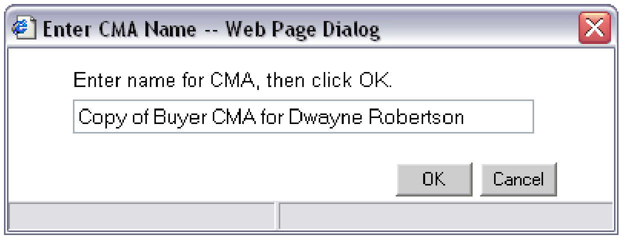
To copy an existing CMA:

1. From the CMA Manager page, select a presentation you want to copy.

   Note: You can only copy one CMA at a time.

2. Click the **Copy CMA** button.

The Enter CMA Name dialog opens. The default name is "Copy of [Seller CMA/Buyer Presentation] for [client name]".



3. Type a new name or accept the default.
4. Click **OK**.

   The new item appears in the list, ready to be edited.
   See *"Opening or Editing a CMA" on page 149*.

Deleting a CMA

To delete a CMA:

1. From the CMA Manager page, select one or more CMAs from the list.
2. Click **Delete CMA** from the footer bar.

   A message box opens, prompting you to confirm the deletion.

3. Click **OK**.

   The CMA is permanently deleted.

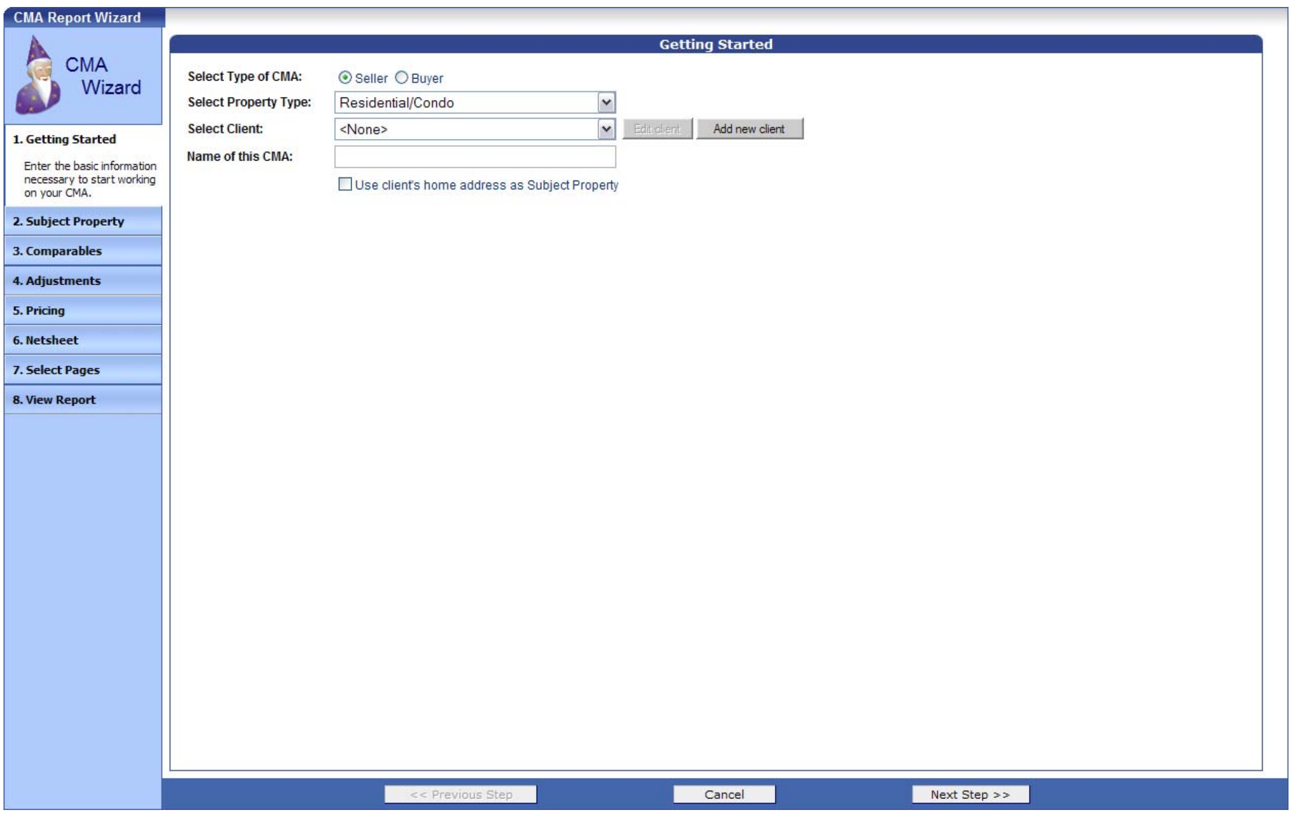
Creating a New CMA

When you click the **New CMA** button from the CMA Manager main page, the CMA Wizard appears to assist you with creating a new Buyer or Seller CMA. There are 8 easy-to-follow steps that take you from the basic presentation setup to adding comparables, adjustments, and pricing to finally creating a CMA report. You can also add a new client or use the library of system CMA templates.

To create a new CMA:

1. From the CMA Manager main page, click **New CMA**; or from the main menu, click **Reports** > **New CMA**.

   The CMA Report Wizard page opens at step **1. Getting Started**.



2. Select the type of CMA: **Buyer** or **Seller**.
3. Click the **Select Property Type** drop-down list and choose the kind of CMA presentation to create (for example, Residential/Condo).
4. Click the **Select Contact** drop-down list and select a contact name to associate with the CMA.
   - click the **Edit contact** button to make changes to the contact record. See *"Editing Contact Information" on page 52*.
   - click the **Add new contact** button to add a new contact record, then select the name from the list. See *"Adding a New Contact" on page 58*.

NOTE! *Be sure to select the correct CMA Type, Client, and Property Type NOW, as you cannot change these values later.*

5. In the **Name of this CMA** field, enter a descriptive title.

   The default is **[Buyer/Seller] CMA for [client name]**.

6. Click the **Use contact's home address as Subject Property** check box, if appropriate.

   This option automatically copies the property information from the existing contact record to the new CMA. Once you have created the new CMA, you will also have the option of adding Subject Property information directly from an MLS or Tax search (where available).

TIP ... You can also click step 2. Subject Property from the CMA Wizard side panel.

7. Click **Next Step**.

   The Subject Property page opens.

8. Proceed to "*Adding Subject Property Information*".

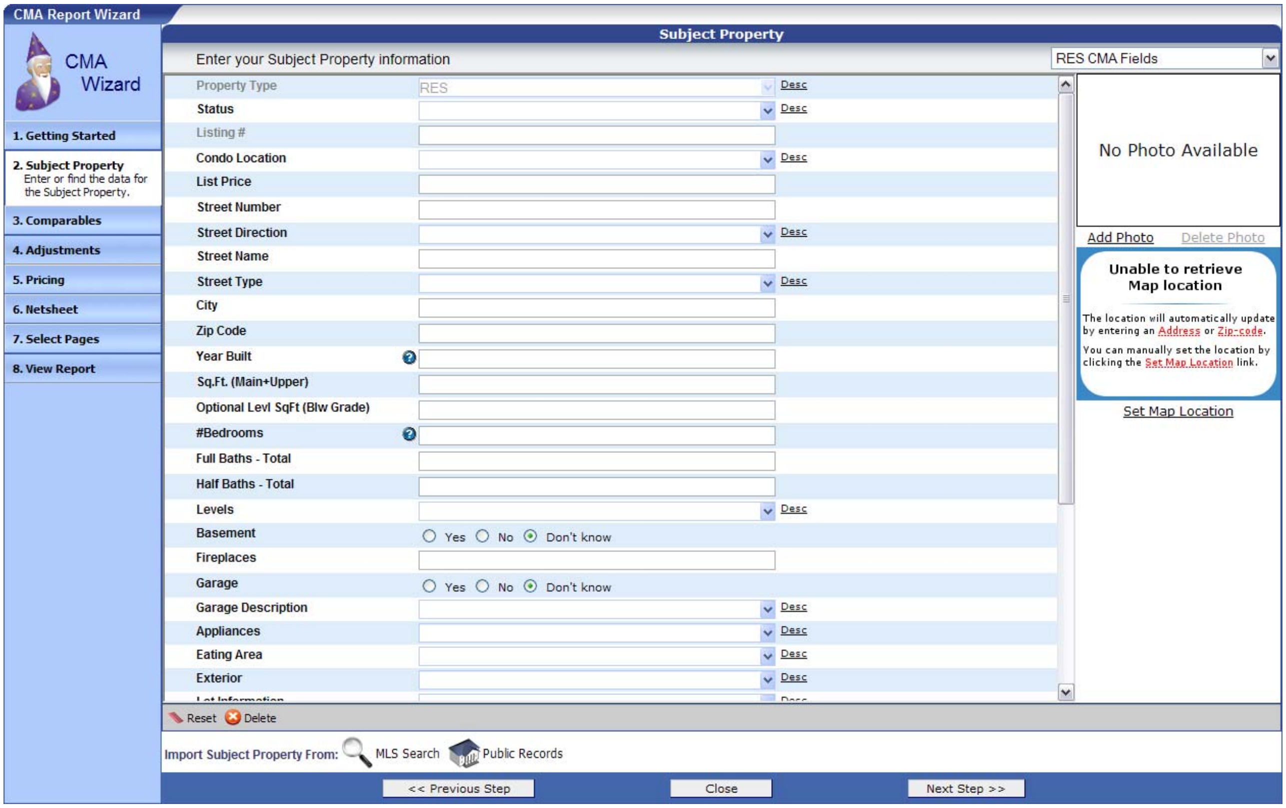
Adding Subject Property Information

If you selected **Use contact's home address as Subject Property** when creating the CMA, some of the fields may already contain information. Otherwise complete the fields on the Subject Property page manually, or import property information by performing an MLS Search or a Public Records tax search.

To add subject property information:

1. From the Subject Property page, enter or find the information for the available fields.

   Note: The information you enter here is used in various locations in the CMA, so it is important that you enter as much information as possible.



2. Click the drop-down list in the top right corner and select the category of fields to display on this page, for example, **RES CMA Fields**, or **All Fields**.
3. You may be able to search for and import information. If the subject property:
   - has a recent listing record in the MLS database, click the **MLS Search** button at the bottom of the page.
   - does not have a listing record in the MLS database, click the **Public Records** button to search the public tax records (if available in your area).

   The Search Criteria dialog opens, from which you can perform a search. See *"Property Type Searches" on page 65*.
4. Make any changes or additions to the imported property information as required.

NOTE! *Although it is possible to find Subject Property information through an MLS or tax record search, changes to the subject property information will NOT affect the listing or tax record itself. Adding subject property information through an MLS or tax search makes a copy of the information that can then be edited independently.*

5. To add a subject property photo, click the **Add Photo** link, located in the upper right panel.

   The CMA Subject Property Photo window opens. See *"Managing Images" on page 293*.
   - click **Delete Photo** to remove the subject property's image.

TIP ... You can also click step 3. Comparables from the CMA Wizard side panel.

6. If TEM PO 5 is unable to determine (or has incorrectly determined) the property's location on a map, based on the address and zip code information, click the **Set Map Location** link to manually set the map.

   The Set Map Location dialog opens. See *"Mapping" on page 215*.

7. Click **Next Step**.

   The Search Criteria dialog is automatically launched allowing you to look for specific comparable listings. Or, if there are comparables associated with the CMA, the Comparable Properties page opens.

8. Proceed to "*Working with Comparable Properties*".

Working with Comparable Properties

Use the Comparables feature to search for and list a number of comparable properties for the selected CMA. The list can be sorted, filtered, reordered, and resized similar to the standard Search Results list. See *"Viewing, Sorting and Filtering" on page 22*. You can search the MLS, perform a tax search, or add a new comparable manually.

To add comparable properties:

1. From the Search Criteria dialog that automatically opens from the previous step, perform a search of the database. See *"Property Type Searches" on page 65*.

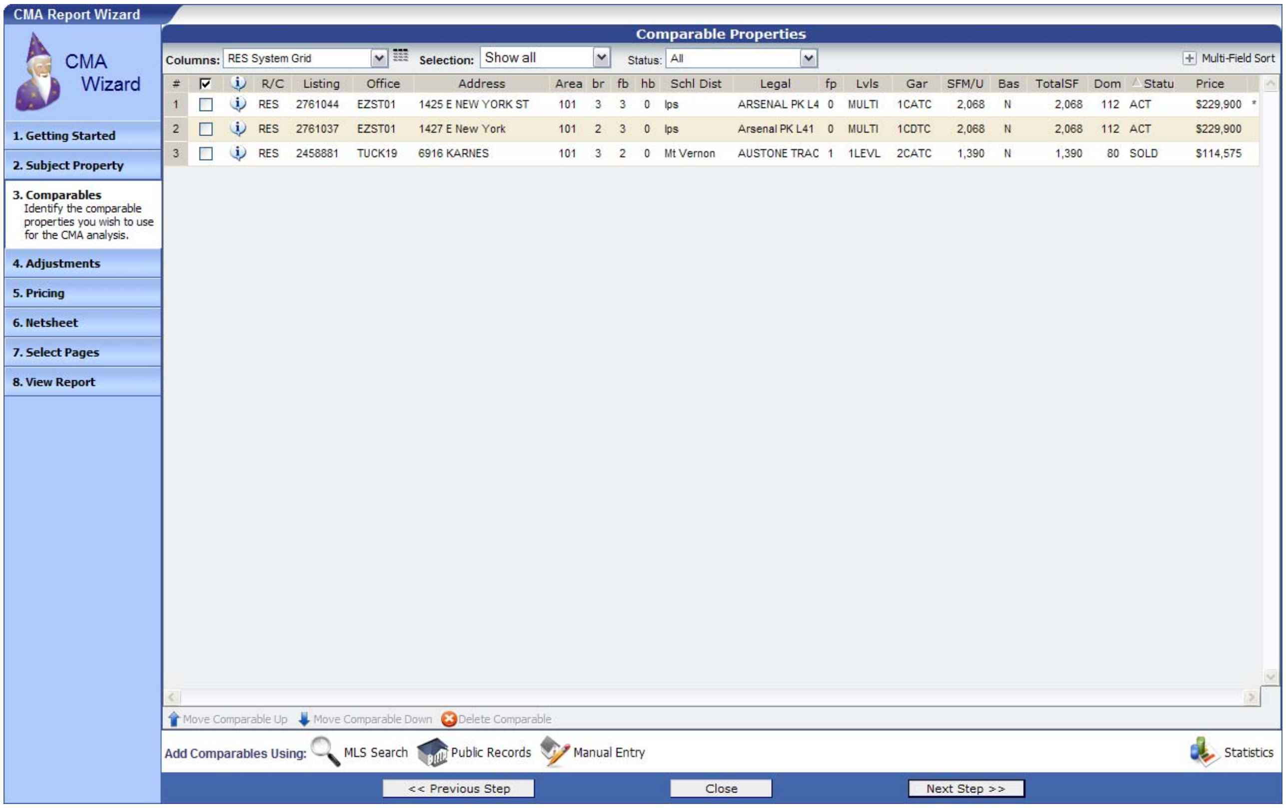
   - from the **Search Results** tab, select one or more listings, then click the **Add Selected Records as Comparables** button. A copy of the selected record's information appears. Skip to step #3.

   *Note: Click **Cancel** to exit the Search dialog box if you are going to add comparable properties by using the action buttons.*

2. If the comparable property:

   - has a recent listing record in the MLS database, click the **MLS Search** button at the bottom of the page to perform a search.
   - does not have an listing record in the MLS database, click the **Public Records** button to perform a tax search.
   - does not have a listing record in the MLS database and you want to add the listing information manually, click the **Manual Entry** button to create a new comparable listing.

The Comparable Properties page opens displaying the newly added listings.



3. From the **Columns** drop-down list, you can choose a different layout grid view. See *"Column Manager" on page 317*.

4. Sort the list in ascending or descending order by clicking a column header. See *"Viewing, Sorting and Filtering" on page 22*.

5. Select a listing, then click the **Move Comparable Up/Move Comparable Down** button on the footer bar to move it up or down in the list.

6. To filter the list by record selection, select any number of records from the list. Click the **Selection** drop-down list and select an option:
   - **Show all** — all records are displayed.
   - **Show selected** — only the selected records are displayed.
   - **Show unselected** — only the records that are not selected are displayed.

7. To filter by status, choose an item from the **Status** drop-down list. Only those items with the corresponding status are displayed. For example, Sold, Back on Market, etc.

8. Click the **Multi-Field Sort** button to perform a multiple sort. See *"Multi-Field Sorting" on page 24*.

9. Select a record, then click the Information icon to display the Quick Access menu commands: **Report**, **Tax**, **Property History**, **Images**, **Map**, **Edit**, or **Delete**.

10. Click the **Statistics** button to generate a Search Criteria report that you can print. See *"Running Business & Statistical Reports" on page 193*.

TIP ... You can also click step 4. Adjustments from the CMA Wizard side panel.

11. Click **Next Step**.

    The Comparable Adjustments page opens.

12. Proceed to *"Making Adjustments to Comparables"*.

To edit a comparable:

1. From the Comparable Properties page, select one or more comparables in the list.
2. Point to the Information icon to display the Quick Access menu, then select **Edit**.

   The Edit CMA Property window opens.

   *Note: If you are editing the comparable because its price or status has changed, select **Status Change** or **Price Change** from the drop-down list. Only the fields necessary to make these changes are displayed, making it quicker and easier for you to make these kinds of changes.*

3. Make changes to the property information as required.
4. Click **Save** to save the comparable property information; if you want to discard your edits and make new changes, click **Reset**.
5. To edit another comparable property, click the **Previous** [] and **Next** [] buttons at the top of the window, or select a property from the drop-down list to go directly to it.
6. Click **Close**.

   A message box opens prompting you to save your changes.

7. Click **OK**.
8. Proceed to *"Making Adjustments to Comparables"*.

To delete comparables:

1. From the Comparable Properties page, select one or more unwanted comparables in the list.
2. Select the **Delete Comparable** button on the footer bar.

   A message box opens, prompting you to confirm the deletion.

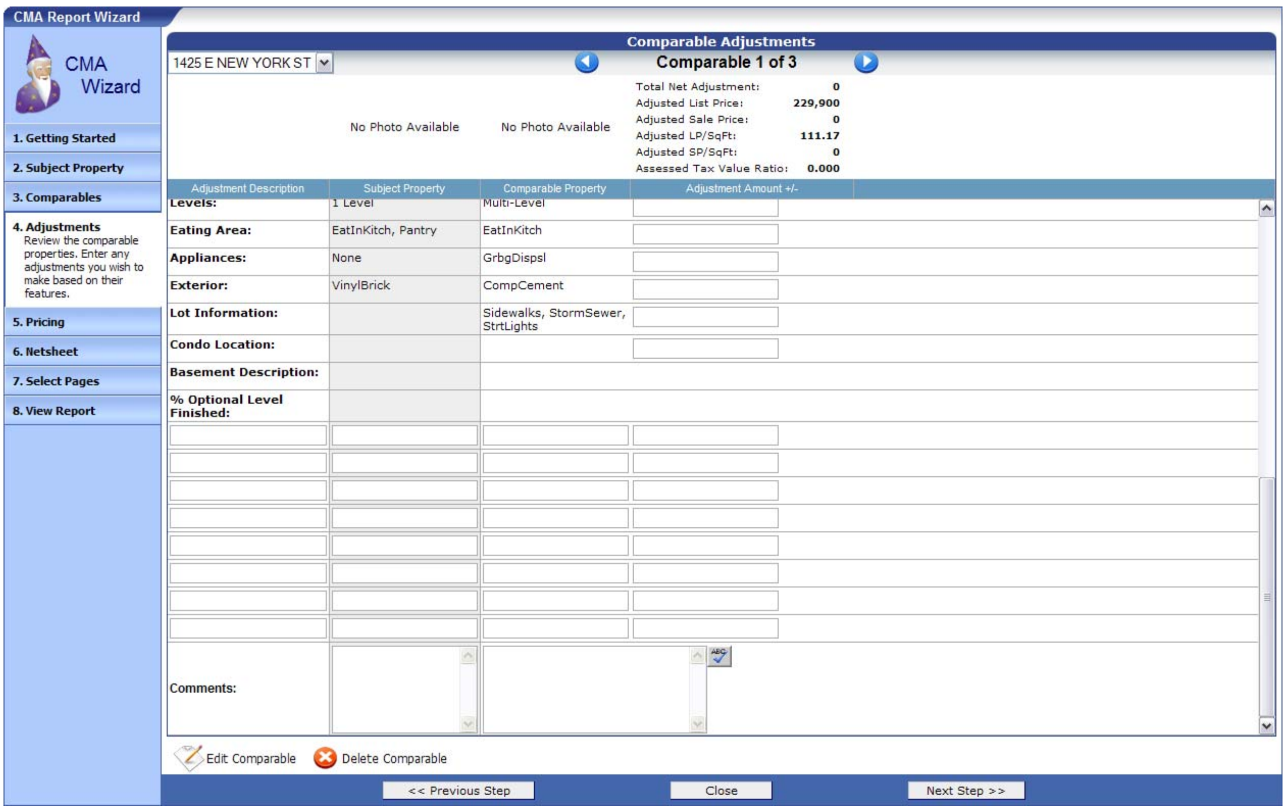
3. Click **OK**.
4. Click **Next Step**.
5. Proceed to *"Making Adjustments to Comparables"*.

Making Adjustments to Comparables

The Comparable Adjustments page displays a side-by-side comparison of Subject property and Comparable property. You can add value adjustments to comparable properties to factor in/out for features not available in the selected property.

To make adjustments to comparables:

1. From the Comparable Adjustments page, complete the **Adjustment Description**, **Subject Property**, **Comparable Property** and **Adjustment Amount** boxes as required.



*Note: If an amount is meant to reduce the **Adjustment Amount** of the comparable property, make sure you put a minus sign ("-") in front of the amount.*

2. Add any **Comments** for the comparable that you want to show up in the finished CMA report.
   - click the **Spell Check** icon to check the spelling.
3. To make price adjustments to other comparable properties, click the **Previous** [ ] and **Next** [ ] buttons at the top of the window, or select a property from the drop-down list to move directly to it.
4. To edit the **Subject Property** or the displayed **Comparable Property**, click the **Edit Comparable** button.

   The Edit CMA Property window opens. See *"To edit a comparable:" on page 157*.

TIP ... You can also click step 5. Pricing from the CMA Wizard side panel.

5. To delete the **Subject Property** or the displayed **Comparable Property**, click the **Delete Comparable** button. See *"To delete comparables:" on page 157*.
6. Click **Next Step**.

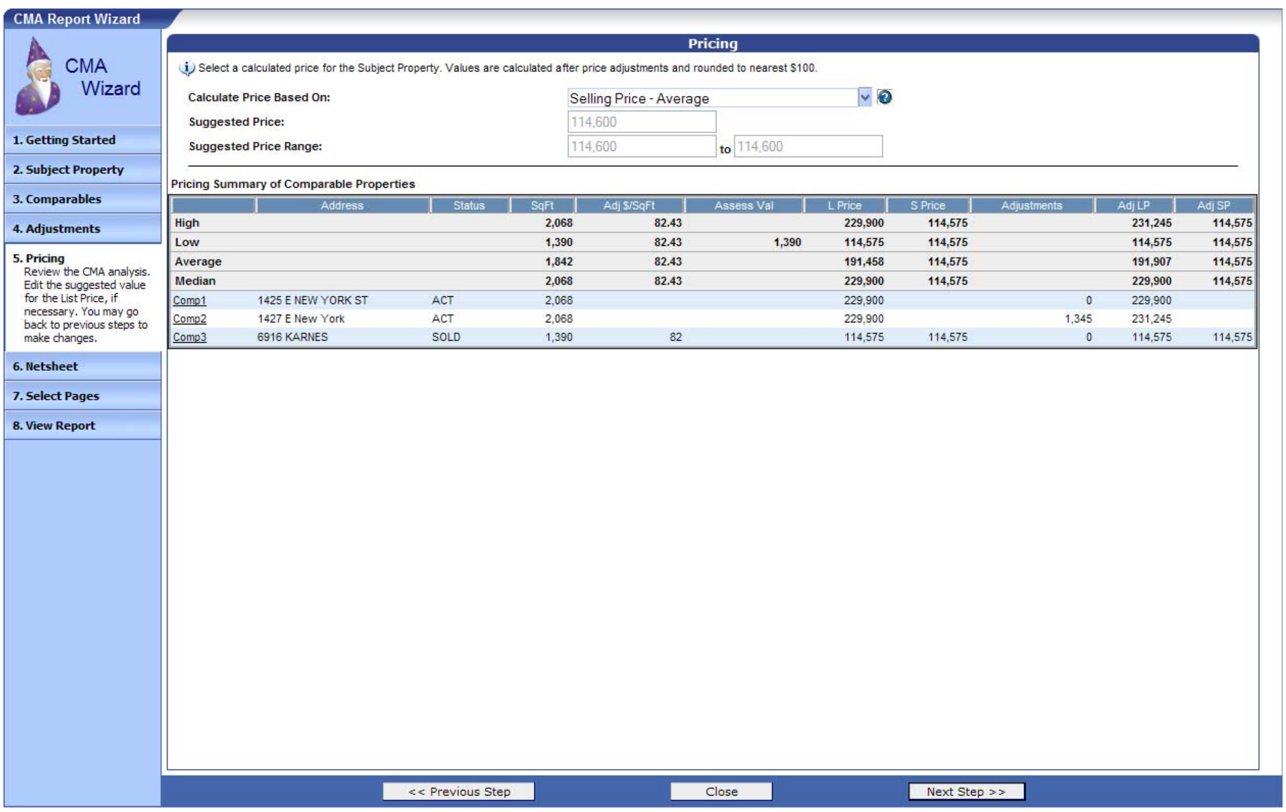
   The Suggested Price page opens.
7. Proceed to "*Determining the Suggested Price*".

Determining the Suggested Price

Enter a suggested list price or price range for the subject property, or use one of the calculation methods to determine a suggested list price based on the selling prices of comparable properties. Within each type of calculation method, choose if you want to use the High, Low, Median or Average value to perform the calculation.

To determine the suggested price of the subject property:

1. From the Pricing page, click the **Calculate Price Based On** drop-down list and select an option:



- **Manually Entered Price** — enter your own suggested price, then enter values in the **Suggested Price** or the **Suggested Price Range** fields.
- **Selling Price** — automatically calculates a suggested selling price, based on the high, low, average, or median adjusted selling price (after price adjustments) of sold comparable properties.

- **Listing Price** — automatically calculates a suggested selling price, based on the high, low, average, or median adjusted listing price (after price adjustments) of comparable properties, regardless of their list status.
- **Price Per Sq Ft** — automatically calculates a suggested selling price per square foot, based on the high, low, average, or median adjusted selling price per square foot of sold comparable properties, multiplied by the square footage of the subject property (ppsf x subject property sq ft.).
- **Assessed Tax Value Ratio** — automatically calculates a suggested selling price, based on the tax value ratio (assessed tax value divided by the adjusted selling price) of sold comparable properties. The assessed tax value of the subject property is divided by the high, low, average, or median tax value ratio of sold comparable properties.

Note: Suggested price values are calculated after price adjustments have been applied to the subject property, then rounded to the nearest $100.

TIP ... You can also click step 6. Netsheet from the CMA Wizard side panel.

2. Review the CMA analysis, based on the selected comparable properties.
   - to adjust the comparables, click on the link, e.g. **Comp1**, **Comp2**, etc.
3. Click **Next Step**.

   The Estimated Seller's Net Proceeds or Buyer's Closing Costs page opens.
4. Proceed to "*Estimating Net Proceeds & Closing Costs*".

Median vs. Average Definitions

A median value is the "mid-point" value in a range of numbers which have been put in order of magnitude (from lowest to highest). Approximately half of the data are smaller and half of the data are larger.

An average value, also known as the "mean" is the value of all data totalled up and divided by the number of values in the sample.

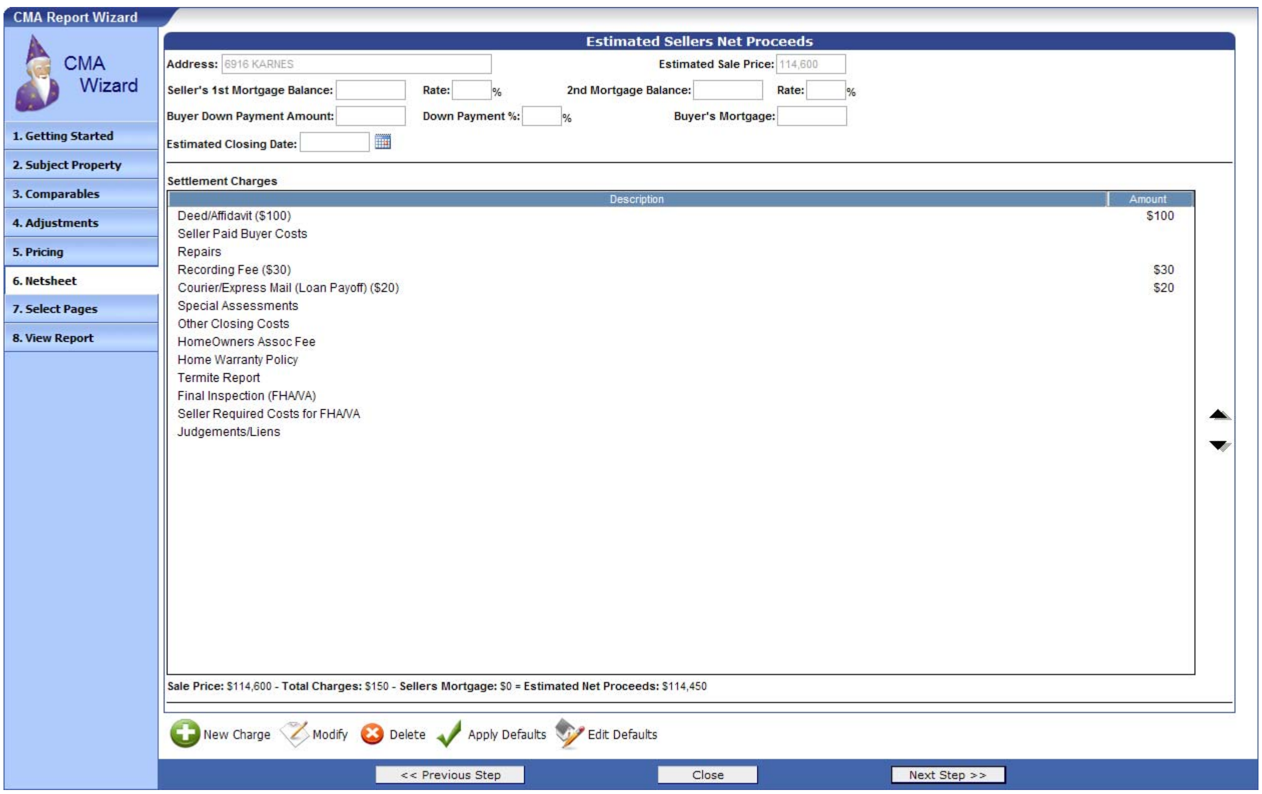
Estimating Net Proceeds & Closing Costs

Prepare an estimate of the Seller's net proceeds or the Buyer's closing costs to include with the CMA. A running total is displayed at the bottom of the page. You can view and modify existing netsheets later by clicking on the **Financials** menu. See *"Buyer and Seller Net Sheets" on page 206*.

To estimate net proceeds or closing costs:

1. From the Estimated Seller's Net Sheet or Estimated Buyer's Closing Costs page, enter the seller or buyer financial information in the fields at the top of the page.

   Note: The ***Estimated Sale Price*** *is the same as your* ***Suggested Sale Price****.*



   Note: If you are preparing a Buyer Presentation, this page looks slightly different than the Estimated Sellers Net Proceeds page.

   The list of **Settlement Charges** or **Closing Costs** should show all of the hypothetical transaction details, including all of the seller or buyer paid fees and closing costs.

2. To change the order of expenses in the list (which is also the order in which they will be printed), select the expense you want to move and click the up and down arrow buttons (located on the right side of the list).

3. To quickly add a standard list of pre-defined seller expenses or buyer costs, click **Apply Defaults**.

- to set up your list of default expenses, or make changes, click **Edit Defaults**. See *"Setting Up Default Netsheet Information" on page 162*.

4. Use the Action buttons at the bottom of the page to manage the individual expenses in the list:
   - click **New Charge** to add an expense or cost item; or to add a heading or separator line. See *"Adding and Editing a New Charge" on page 163*.
   - to modify an existing expense, select it then click **Modify**. See *"Adding and Editing a New Charge" on page 163*.
   - to delete an expense, highlight it in the list, then click **Delete**.

   Note: Use the up/down arrows to move blank lines out of the list.

TIP ... You can also click step 7. Select Pages from the CMA Wizard side panel.

5. Click **Next Step**.

   The Select Pages page opens.
6. Proceed to "*Selecting Pages for the CMA Presentation*".

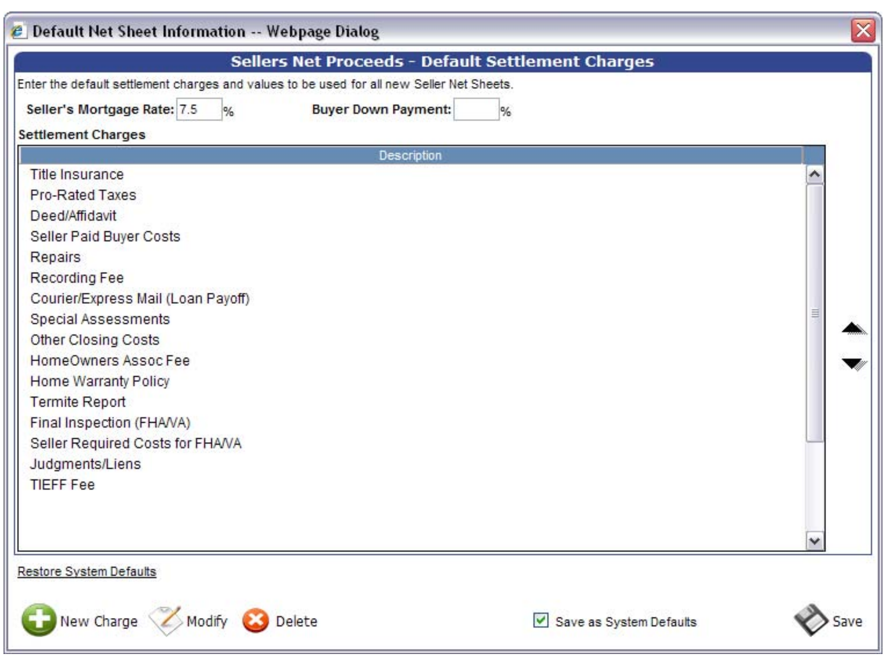
Setting Up Default Netsheet Information

You can pre-define a list of regularly used closing costs or settlement charges to be applied to all new netsheets. Click the **Apply Defaults** button to automatically add the list to the page. Click the **Edit Defaults** button to make changes to your system default charges.

To set up a list of default seller expenses or buyer costs:

1. At the bottom of the Netsheet, click the **Edit Defaults** button.

   The Default Netsheet Information page (whether for Seller or Buyer) opens.



2. To re-order an item in the list, highlight it, then click the up [▲] and down [▼] arrows at the far right until the item is correctly positioned.
3. Click the **New Charge** button to specify the details of a new expense item.
   - click the **Modify** button to edit the details of a selected expense item. See *"Adding and Editing a New Charge" on page 163*.
4. To remove an unwanted expense item, highlight it then click **Delete**.
5. Select the **Save as System Defaults** check box to make this pre-defined list of default expenses the default list.

NOTE! *This new default list supersedes any other list and will be the one applied if you restore the system defaults.*

6. Click the **Restore System Defaults** link to revert back to the original list.
7. Click **Save**.

   You are returned to the main Netsheet page.

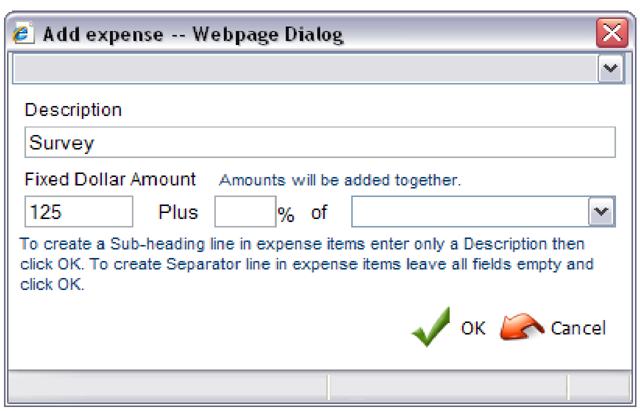
Adding and Editing a New Charge

You can use the Add expense dialog box to not only add a new item, but also to insert a descriptive sub-heading or a separator line. Similarly, use the Edit expense dialog box to modify the charge.

To add a new expense, manually:

1. Click the **New Charge** Action button to add an expense that is not yet listed.

   The Add expense dialog box opens.



2. Enter the following:
   - **Description** — a brief description of the expense.
   - **Fixed Dollar Amount** — type the actual expense amount, for example $125.
   - **Plus %** — type a percentage (%) amount of the value you select from the drop-down list. For example 10% of the **Purchase Price**.

Note: If you enter a value in <u>both</u> the Fixed Dollar Amount and % fields, the values will be added together.

3. Click **OK**.

   You are returned to the Netsheet page.

To add a blank line (separator):

1. Leave all fields empty in the Add expense dialog box.
2. Click **OK**.
3. Use the up/down arrows on the Netsheet page to position the separator in the list.

To add a sub-heading:

1. Type the sub-heading in the **Description** field of the Add expense dialog box.
2. Click **OK**.
3. Use the up/down arrows on the Netsheet page to position the heading in the list.

Selecting Pages for the CMA Presentation

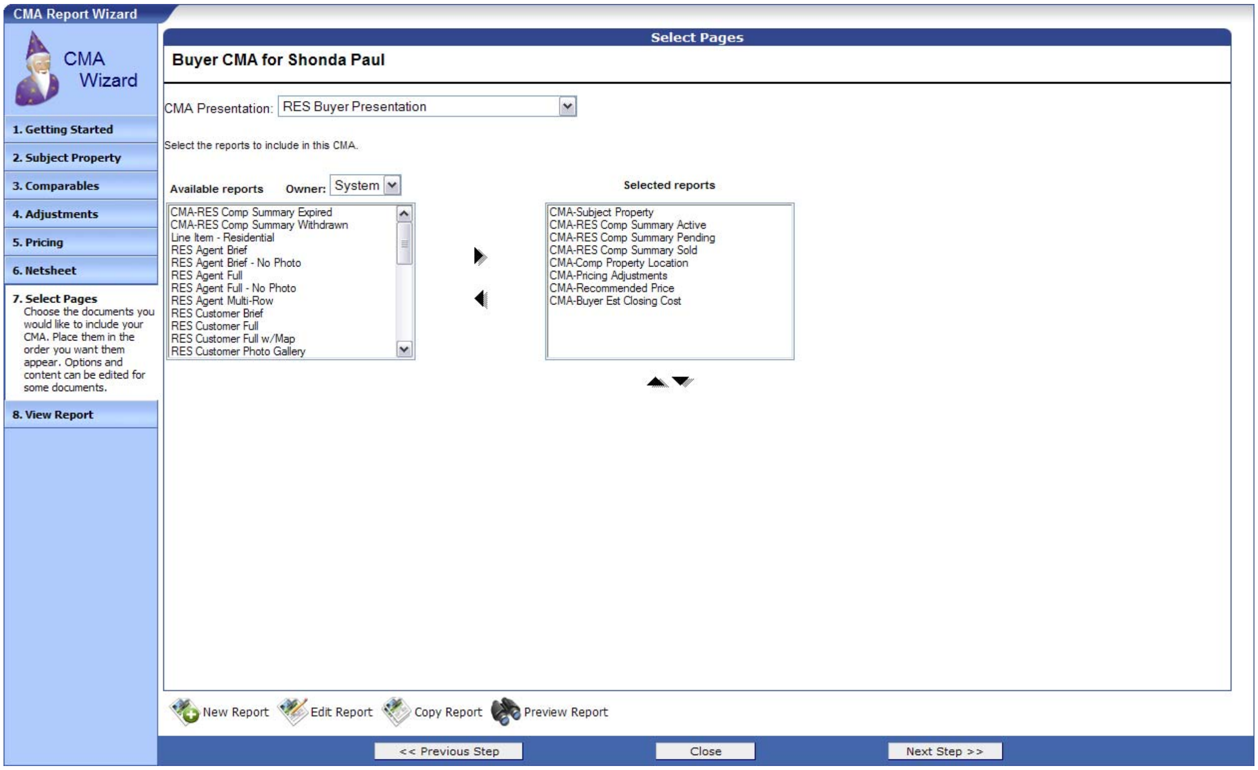
Select the report pages to include with this CMA. Some reports can be created, copied, edited, and previewed from this page.

To select the report pages to include:

1. From the Select Pages page, click the **CMA Presentation** drop-down list and select a category: Buyer, Seller, or Custom.
2. Click the **Owner** drop-down list to select from **System** reports or **Personal** reports.

   Note: If you are working with a Custom presentation, you can choose from All, System, Personal or Office reports.

The **Available reports** list displays the reports you can use in this presentation.



3. From the **Available reports** list, highlight one or more reports in the list.
4. Click the right arrow [ ] button to move your selections to the **Selected reports** list.
   - in the **Selected reports** list, highlight a report and click the up/down arrows to re-order the list.
5. Use the Action buttons:
   - **New Report** — click this button to design a new report that can be used in this presentation, other presentations, or by other users. See *"Creating a New Report" on page 178*.
   - **Edit Report** — click this button to modify an existing Personal report. System reports cannot be edited.

   Note: The changes will be applied to all CMAs where this report has been used.

   - **Copy Report** — when working on a Custom CMA, click this button to make a copy of an existing report so that you can edit it. Make the copy available to this CMA exclusively, other CMAs, or everywhere as a Personal report.
   - **Preview Report** — click this button to preview each report page as you highlight it in the list.

TIP … You can also click step 8. View Report from the CMA Wizard side panel.

6. Click **Next Step**.

   The View Report page opens.
7. Proceed to "*Viewing the New CMA Presentation*".

Viewing the New CMA Presentation

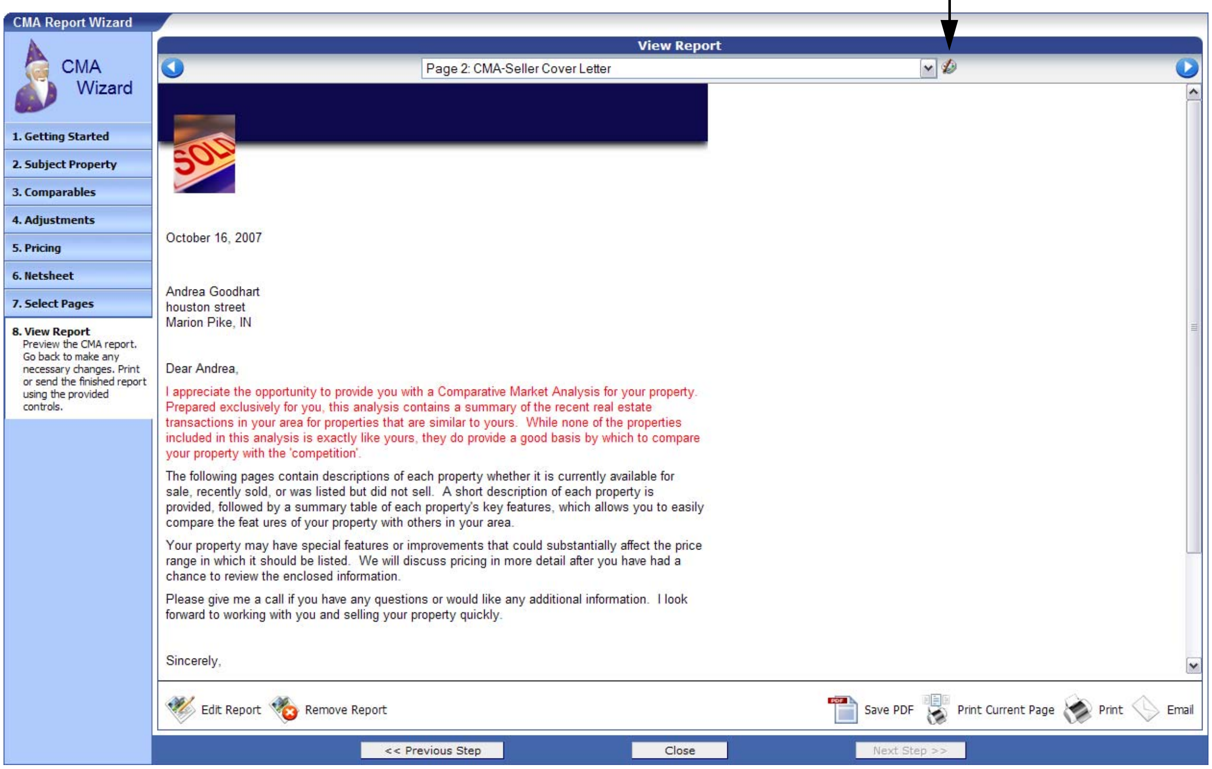
The final step in the CMA Wizard enables you to view and print each page in the CMA presentation so that you can make any last minute changes. Then, save individual pages or the entire final report to PDF format, attach it to an e-mail or print it.

To review the finished CMA report:

1. From the CMA Wizard page, click **8. View Report**.

   The View Report page opens.

Select Stationery icon.



2. To review each page of the report:
   - click the left [ ] and right [ ] arrow buttons to scroll through each page; or
   - click the drop-down list and choose the page you want to see.
3. To change one or more pages in the final report, display the page you want to modify, then click the **Edit Report** button.

   Note: You can modify an existing Personal report. System reports cannot be edited.

   The CMA Report dialog box opens.
   - Select one of the options, depending on how you want to apply the new report, then click **OK**:

- Make this report exclusively for this CMA Presentation
- Allow this report to be available for other CMA Presentations
- Add this report to my Personal Reports so it's available everywhere

The Report Editor opens. See *"Using the Report Editor" on page 184*.

4. To remove one or more pages from the final report, click the drop-down list to display the unwanted page, then click the **Remove Report** button.

   Note: Removing report pages does not change the CMA presentation template, only the appearance of this particular report.

Selecting a Stationery Style

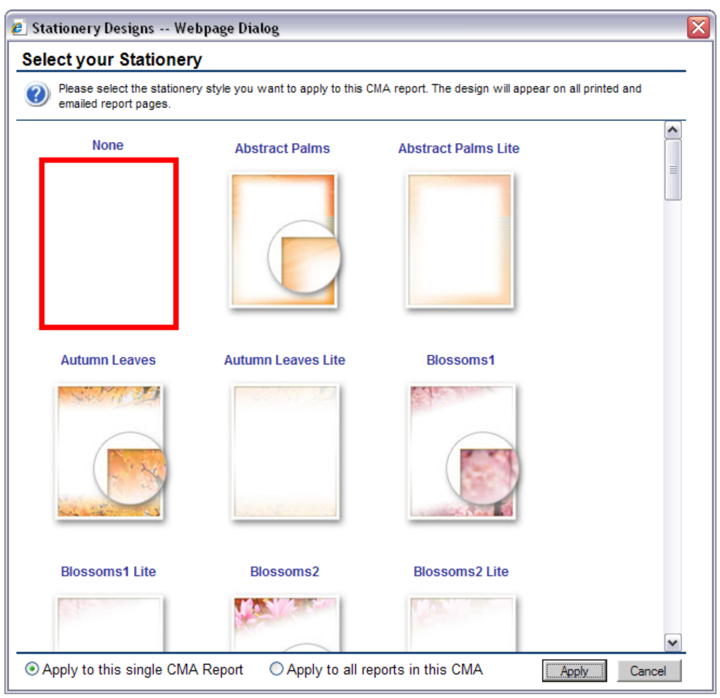
You can choose to give your CMA reports a more attractive look by applying a visual background image to one or all pages of a report and/or a CMA presentation. Once applied, the stationery appears on-screen, in print, e-mail and PDF formats.

To apply a stationery design:

1. From the View Report page of the CMA Wizard, click the **Select Stationery** icon [ ].

   The Select your Stationery dialog box opens.

All available stationery themes are included in a template library. You cannot upload custom images.



2. Click on a design to highlight it. (A red frame appears around the selection).
3. Click one of the option buttons, at the bottom of the dialog box:
   - **Apply to this single CMA Report** — the selected theme is applied only to the report page currently displayed.

- **Apply to all reports in this CMA** — the selected theme is applied to all pages of the report.

4. Click **Apply**.

Selecting a Final Output for the CMA

Once the CMA presentation is complete, there are a couple of ways to present the final report to your client. You can save the report as a PDF file, which can be easily distributed. The recipient requires Adobe® Reader (available for free from the Adobe web site) to open and read a PDF file.

If you choose to e-mail your client, you are actually sending a link in the body of the e-mail message which, when clicked, opens the CMA presentation in a Browser.

Finally, you can print the CMA presentation, in its entirety or one page at a time.

To save, send, or print the final CMA report:

1. From the final CMA presentation page, click one of the following buttons:
   - **Save PDF** — saves the report as a PDF file for easy readability and distribution. See *"Saving a Report as a PDF Document" on page 269*.
   - **Print Current Page** — lets you print a single selected page of the CMA.
   - **Print** — lets you print the entire CMA. See *"Printing" on page 265*.
   - **E-mail** — lets you send an e-mail to the recipient, with a link to the CMA presentation. See *"E-Mailing CMAs" on page 135*.
2. Click **Close**.

CMA Presentation Library

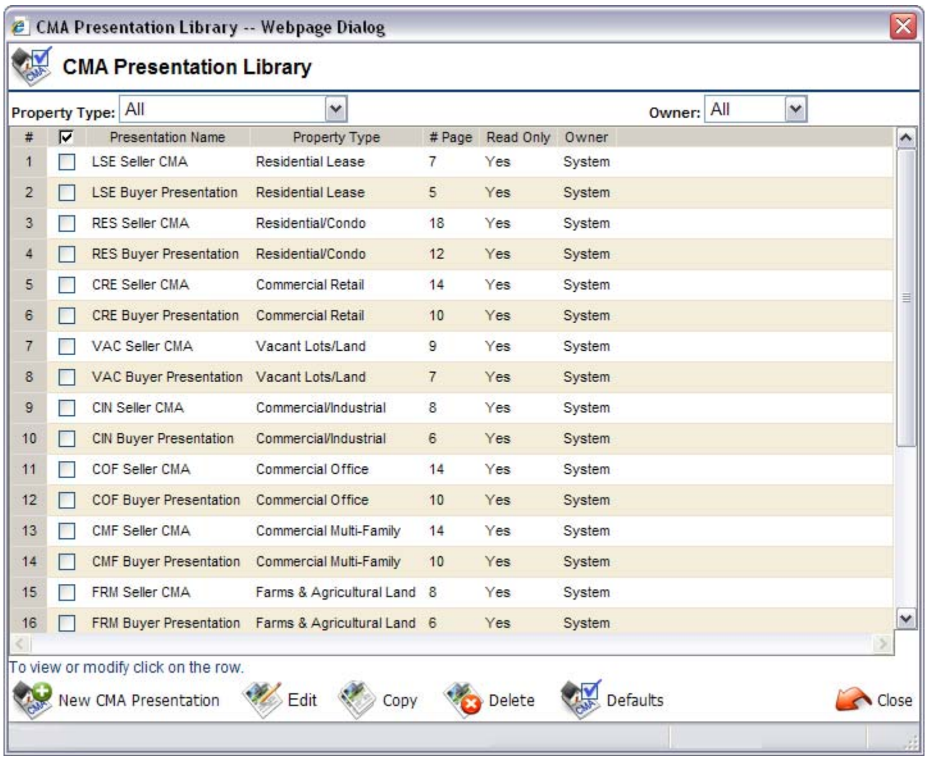
TEMPO 5 has an integrated library of pre-designed CMA presentations. Use them directly, or copy and modify the CMAs to suit your needs. Choose and apply the presentation pages that are to be used by default whenever you create a new CMA. Some presentations may have been created by your office administrators, while you can and will create some yourself.

NOTE! *You can only edit and delete CMA presentations you created yourself.*

To access the CMA Presentation Library:

1. From the CMA Manager page, click the **CMA Presentation Library** button.

   The CMA Presentation Library pop-up window opens with a list of available templates.



2. Click the **Property Type** drop-down list and choose a category for which you want to view related CMAs (for example, Residential).
   - select **All** to display all property type CMAs.
3. Click the **Owner** drop-down list and select from: **All**, **System**, **Office**, or **Personal**.
4. To sort the list of displayed presentations in alphanumerical order, click in the column header.
   - click the same column header again to reverse the sort order.
5. Use the Action buttons at the bottom of the page to perform more tasks:

- **New CMA Presentation** — lets you create a new CMA presentation binder by selectively adding report pages. See *"Creating a New CMA Presentation Binder" on page 170*.
- **Edit** — lets you edit a Personal CMA presentation you created by selectively adding or removing report pages. See *"Editing a CMA Presentation Binder" on page 172*.
- **Copy** — lets you copy a System CMA presentation to modify and re-use. See *"Copying a CMA Presentation Binder" on page 173*.
- **Delete** — lets you delete a CMA presentation. See *"Deleting a CMA Presentation Binder" on page 173*.
- **Defaults** — lets you specify CMA Presentation Default Settings to use for each type of property search. See *"Setting Up Default CMA Presentations" on page 174*.

6. Click **Close**.

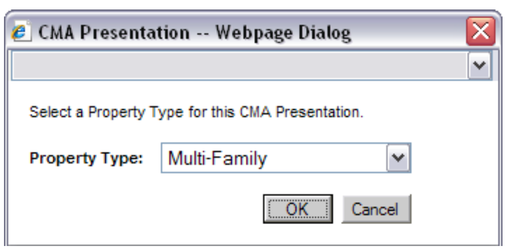
Creating a New CMA Presentation Binder

When creating a new CMA Presentation, you must assign it to a particular property type, then select the report pages you want to include.

To create a new CMA presentation binder:

1. From the CMA Presentation Library page, click the **New CMA Presentation** button.

   The CMA Presentation dialog opens.

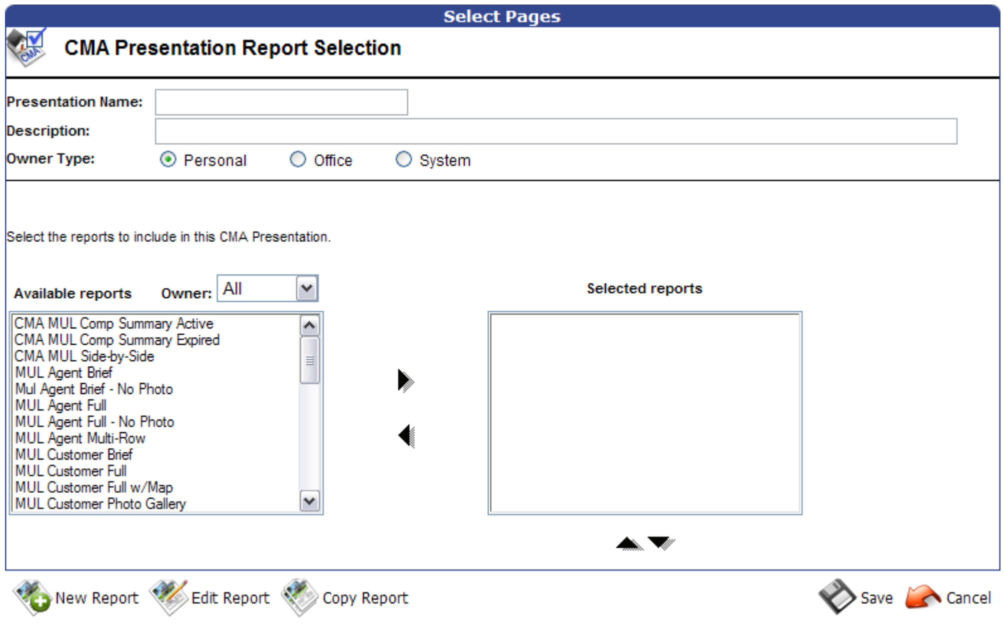


2. Select a **Property Type** from the drop-down list.

   Note: Depending on the property type you choose, different fields are available when adding and modifying presentation pages.

3. Click **OK**.

The CMA Presentation Report Selection page opens.



4. Enter the **Presentation Name** and a **Description** for the new CMA.
5. Select the **Owner Type** option, for example **Personal**.

   Note: You will only see the options for which you have access rights.
6. Click the **Owner** drop-down list and select from: All, System, Office, Personal, or Board.

   The reports corresponding to the Owner type appear in the **Available reports** list.
7. Select one or more reports, (called pages) to add to the CMA presentation binder from the **Available reports** list.
   - to select multiple reports, hold down the CTRL key and click.

   Note: You must include at least one report.
8. Click the right [ ] arrow button to move the pages to the **Selected reports** list.
   - to remove an unwanted report from the **Selected reports** list, highlight it and click the left [ ] arrow button.
9. To rearrange the order of the **Selected reports**, select one report at a time, and click the up/down arrow buttons.

   *Note: The order in the **Selected reports** list determines the order of appearance of the pages in the CMA presentation.*
10. Click the Action buttons to manage report pages:
    - **New Report** — to create a new CMA report from scratch. See *"Creating a New Report" on page 178*.

    *Note: To create a new report from an existing report, select one of the **Available reports** from the list and click **Copy Report**.*

- **Edit Report** — to modify an existing report, for which you have sufficient access rights. See *"Editing a Personal Report" on page 181*.
- **Copy Report** — to copy an existing report, modify and reuse it. See *"Copying an Existing Report" on page 180*.

11. Click **Save**.

    The new CMA appears in the CMA Presentation Library list.

Editing a CMA Presentation Binder

NOTE! You can only edit CMA presentations you created yourself. If you try to edit a report that you don't have access privileges to, TEMPO 5 automatically makes a copy of the report, which you can edit.

To edit a Personal CMA Presentation binder:

1. From the CMA Presentation Library page, select the presentation you want to edit from the list.

   Note: You can edit only one template at a time.
2. Click the **Edit** button; or click directly on the row.

   The CMA Presentation Report Selection window opens.
3. If you are editing a copy, or just want to change the name, type a new name in the **Presentation Name** field.
4. Modify the **Description** text.
5. Select an **Owner Type** option (if you have privileges to change this).
6. Add or remove reports from the presentation by using the left/right [< >] arrow buttons between the **Available reports** and **Selected reports** lists.
7. Click the Action buttons to manage report pages:
   - **New Report** — to create a new CMA report from scratch. See *"Creating a New Report" on page 178*.

   *Note: To create a new report from an existing report, select one of the **Available reports** from the list and click **Copy Report**.*
   - **Edit Report** — to modify an existing report, for which you have sufficient access rights. See *"Editing a Personal Report" on page 181*.
   - **Copy Report** — to copy an existing report, modify and reuse it. See *"Copying an Existing Report" on page 180*.
8. Click **Save**.

   The modified CMA appears in the CMA Presentation Library list.

Copying a CMA Presentation Binder

You can copy a presentation binder of reports that you like to use with a different contact.

To take a copy of an existing CMA presentation binder:

1. From the CMA Presentation Library page, select the presentation you want to copy in the list.

   Note: You can copy only one presentation at a time.

2. Click the **Copy** button.

   The CMA Presentation Report Selection dialog box opens.

3. Accept the default **Presentation Name** (“Copy of [presentation name]”) or enter a new name.

4. The remaining steps are the same as when creating a new CMA presentation. See *“Creating a New CMA Presentation Binder” on page 170*.

Deleting a CMA Presentation Binder

NOTE! *You can only delete CMA presentations you created yourself or for which you have access rights.*

To delete a CMA presentation binder:

1. From the CMA Presentation Library page, select a Personal CMA presentation to delete.

   Note: You can delete only one Personal template at a time.

2. Click the **Delete** button.

   A message box appears, prompting you to confirm the deletion.

3. Click **OK**.

   A message appears advising that your changes have been saved.

4. Click **OK**.

   The presentation no longer appears in the CMA Presentation Library list.

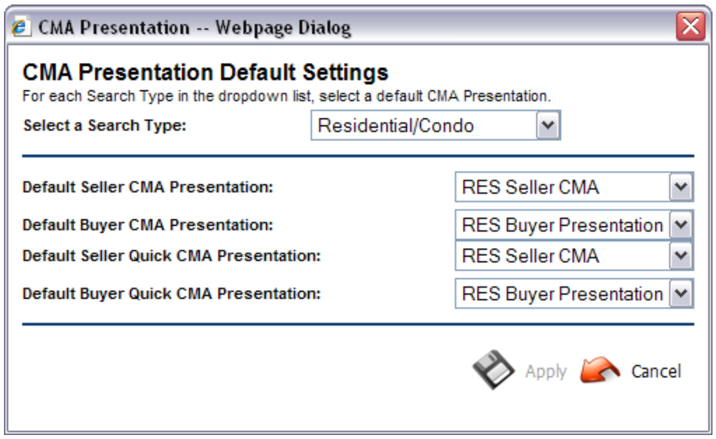
Setting Up Default CMA Presentations

You can set up a number of your favorite CMA presentation binders to be used as defaults whenever you create new CMA presentations. Choose two default CMAs per property type: one for Seller presentations and one for Buyer presentations.

To set up your default CMA Presentations:

1. From the CMA Presentation Library page, click the **Defaults** button.

   The CMA Presentation pop-up window opens.



2. Click the **Select a Search Type** drop-down list and choose a type of search, for example **Multi Family**.
3. Click each of the **Default [Seller/Buyer] CMA Presentation** drop-down lists and choose a CMA presentation binder.

   The selected CMA presentations will be used by default whenever you create a new Seller or Buyer CMA for the selected property type.
4. Click **Apply**.
5. Repeat steps 2 - 4 for each search type in the drop-down list.
6. Click **Close**.

   You are returned to the CMA Presentation Library page. See *"CMA Presentation Library" on page 169*.

Reports

Working with the Report Manager

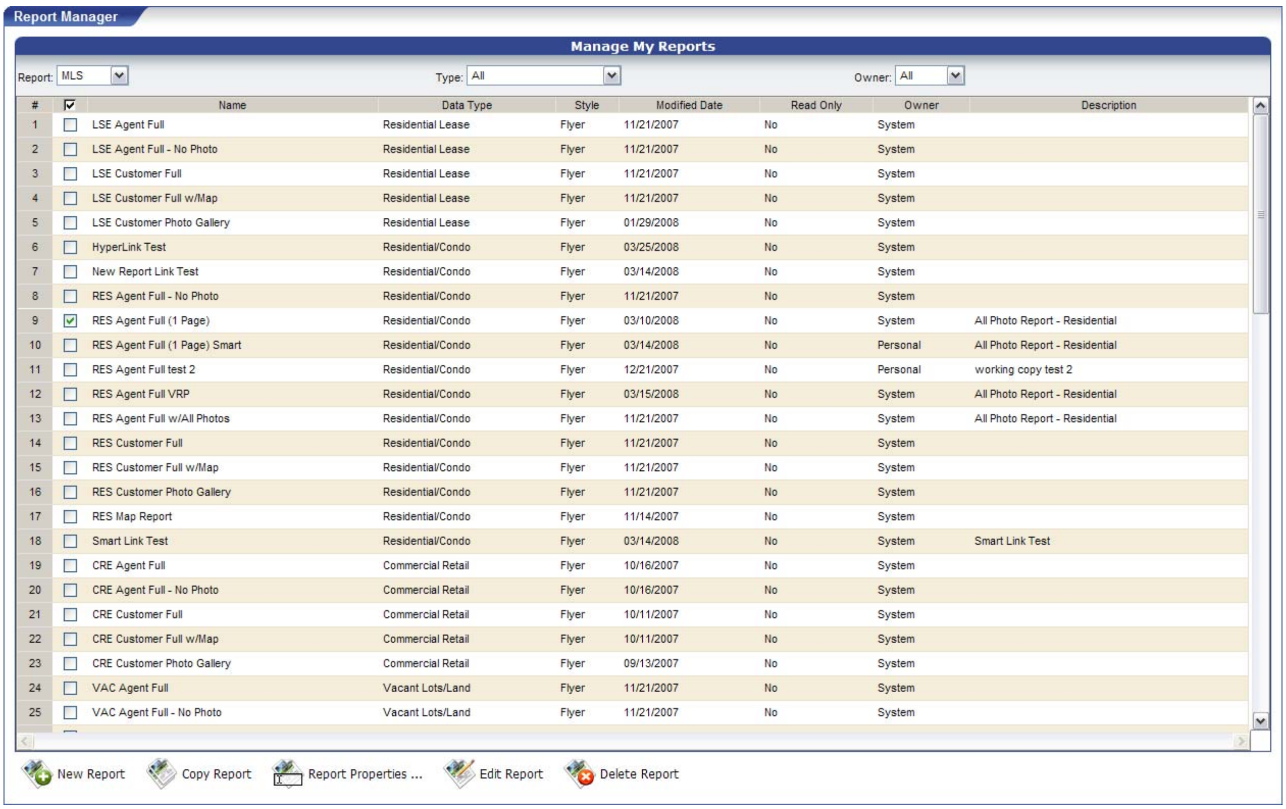
TEMPO 5 features a Report Manager and online Report Editor to give you complete control over creating and managing flyer-style listing reports. In addition, you have statistical reporting capabilities for analyzing market trends and determining agent and office performance.

The list of reports can be quickly and easily sorted, rearranged, and filtered with each column giving you an overview of reporting details.

To access the Report Manager:

- From the main menu, click **Reports > Report Manager**.

  The Report Manager main page opens.



To change the Report Manager list view:

TIP ... Filters can be applied together, or independently. See page 22.

1. From the Report Manager page, you can change the list view by clicking a column header to sort the list in ascending or descending order.
2. Narrow the list of records displayed by applying a simple filter. Click one of the following drop-down lists:
   - **Report** — choose a report category, for example, **MLS** or **Tax**.
   - **Type** — select what kind of reports you want to view, for example, **All**, **Residential**, **Open House**, etc.

3. To filter the list of reports by **Owner**, click the drop-down list and choose:
   - **All** — displays all reports in the system.
   - **System** — displays all read-only reports.
   - **Board** — displays all reports specific to your MLS Board.
   - **Firm** — displays all reports specific to your firm.
   - **Office** — displays all reports specific to your office.
   - **Personal** — displays all editable reports that you have created yourself.

NOTE! *To view the entire list of reports, select **All** from the **Report** and **Owner** drop-down lists.*

4. Select one or more reports, then use the action buttons to perform specific tasks:
   - **New Report** — create a new report. See *"Creating a New Report" on page 178*.
   - **Copy Report** — copy an existing report. See *"Copying an Existing Report" on page 180*.
   - **Report Properties** — change the name and type of an existing report. See *"Changing Report Properties" on page 182*.
   - **Edit Report** — modify an existing report. See *"Editing a Personal Report" on page 181*.
   - **Delete Report** — delete an existing report. See *"Deleting a Personal Report" on page 183*.

NOTE! *You can only edit, rename or delete Personal reports that you created yourself.*
The TEMPO 5 pre-designed System reports are NOT editable.
You must make a copy of a System report and rename it after making changes.

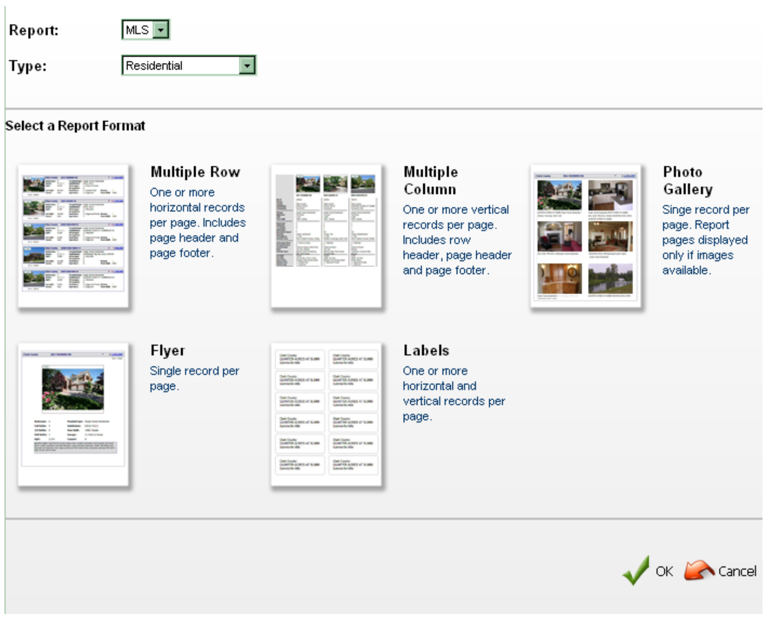
Creating a New Report

You can create a new report from scratch, or copy an existing report to use as a template for your new Personal report.

To create a new report:

1. From the Report Manager page, click the **New Report** button.

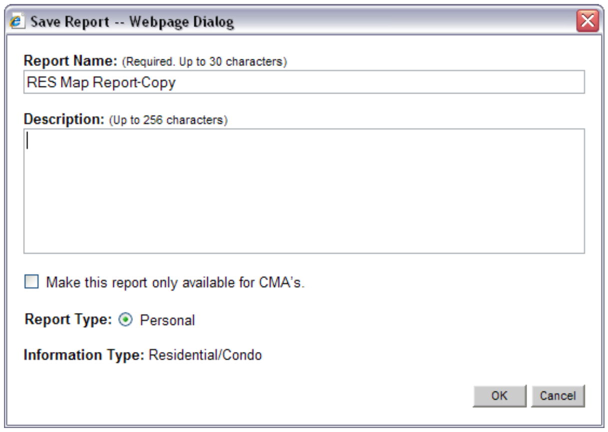
   The New Report dialog box opens in conjunction with Report Editor. See *"Using the Report Editor" on page 184*.



2. From the **Report** drop-down list select a category, for example **MLS**.
3. From the **Type** drop-down list, select the kind of report you want to create.
4. Select a report format from the **Select a Report Format** gallery.
5. Click **OK**.

   The Report Editor opens with the corresponding report type data fields.
6. Use the editor's functionality to design the report. See *"Using the Report Editor" on page 184*.
7. When you are finished, click the **Save** tool bar icon.

The Save Report dialog box opens.



8. Enter the **Report Name** and an optional **Description**.
9. Select the **Make this report only available for CMAs** check box to enable this function.
10. Select a **Report Type** option button, for example **Personal**.
11. Click **OK**.

    The *"Report has been saved"* message box appears.
12. Click **OK**.
13. Click **Close**.

    You are returned to the Report Manager page where the new report is displayed in the list.

Copying an Existing Report

You can copy any type of report in order to create a new report with similar features.

NOTE! *You can only copy one report at a time.*

To copy an existing report:

1. From the Report Manager page, select the report you want to copy.
2. Click **Copy Report**.

   The Report Editor opens.
3. Use the editor's functionality to re-design the selected report. See *"Using the Report Editor" on page 184*.
4. Click the **Select category** drop-down list in the upper left corner and choose the category to which the report will be saved.
5. Click the **Save As** tool bar icon.

   The Save Report dialog box opens.
6. Enter a new **Report Name** and an optional **Report Description**.

   Note: If you accept the original report name, your new report will be saved with the same title as the original report. The difference is your new copy is a Personal report that you can edit, whereas, the original is a System report that is read-only.
7. Select the **Make this report only available for CMAs** check box to enable this function.
8. Select a **Report Type** option button, for example, **Personal**.
9. Click **OK**.

   The *"Report has been saved"* message box appears.
10. Click **OK**.
11. Click **Close**.

    You are returned to the Report Manager page where the copied report is displayed in the list.

Editing a Personal Report

NOTE! *You can only edit a Personal report (one that you have created). TEMPO 5's pre-designed System reports are not editable. You must make a copy to edit. See* *"Copying an Existing Report" on page 180*.

To edit a Personal report:

1. From the Report Manager page select the report you want to edit:
   - click the report line item directly; or
   - click the check box of the target report, then click the **Edit Report** button.

   Note: You can only edit one report at a time. If you select multiple reports, the ***Edit Report*** *button will NOT be available.*

   The Report Editor opens. See *"Using the Report Editor" on page 184*.
2. Make changes to the report. See *"Creating a New Report" on page 178*.
3. When you have completed your modifications, click the **Save** tool bar icon.

   The Save Report dialog box opens.
4. Click **OK**.

   A message box appears confirming the report has been saved.
5. Click **OK**.
6. Click **Close**.

   You are returned to the Report Manager page.

Changing Report Properties

The **Rename Report** button has been changed to the **Report Properties** button, letting you change the report name and type.

NOTE! *You can only rename a Personal report (one that you have created). TEMPO 5's pre-designed System reports are not editable.*

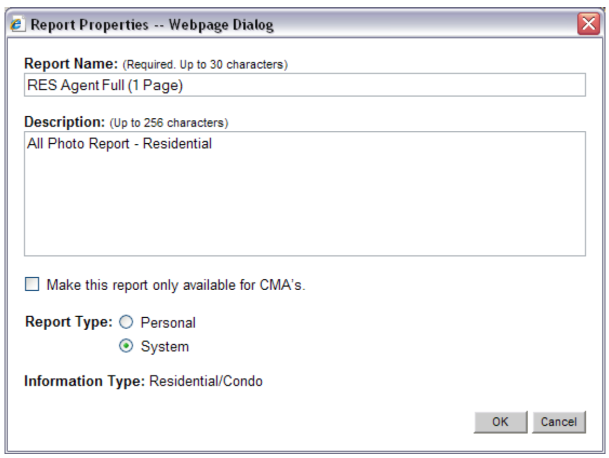
To rename a Personal report:

1. From the Report Manager page, select the report you want to rename.

   *Note: You can only rename one report at a time. If you select multiple reports, the **Report Properties** button will NOT be available.*

2. Click **Report Properties**.

   The Report Properties dialog box opens.

3. Change the **Report Name**.
4. Enter the **Description**.
5. Select the check box if you want this report to be available to CMAs.
6. Select a **Report Type** option button, for example **Personal**.
7. Click **OK**.

   A message box appears confirming the report was successfully renamed.

8. Click **OK**.

Deleting a Personal Report

NOTE! *You can only delete a Personal report (one that you have created). You can NOT delete any of TEMPO 5's pre-designed System reports.*

To delete a personal report:

1. From the Report Manager page, select one or more Personal reports that you want to remove permanently.
2. Click **Delete Report**.

   A message box appears, prompting you to confirm the deletion.
3. Click **OK**.

   A confirmation message appears.
4. Click **OK**.

   The reports no longer appear in the Report Manager list.

Setting a Favorite Reports List

To make it easy to quickly view your favorite reports on the Listing Detail page, TEMPO 5 lets you maintain a list of the reports you use most often. A different list of favorite reports can be set up for each property type. See *"Choosing Your Favorite Reports" on page 46*.

NOTE! *You can choose up to six (6) reports for each Property Type. These appear as Favorite Quick Links on the Listing Details page and are highlighted in yellow.*

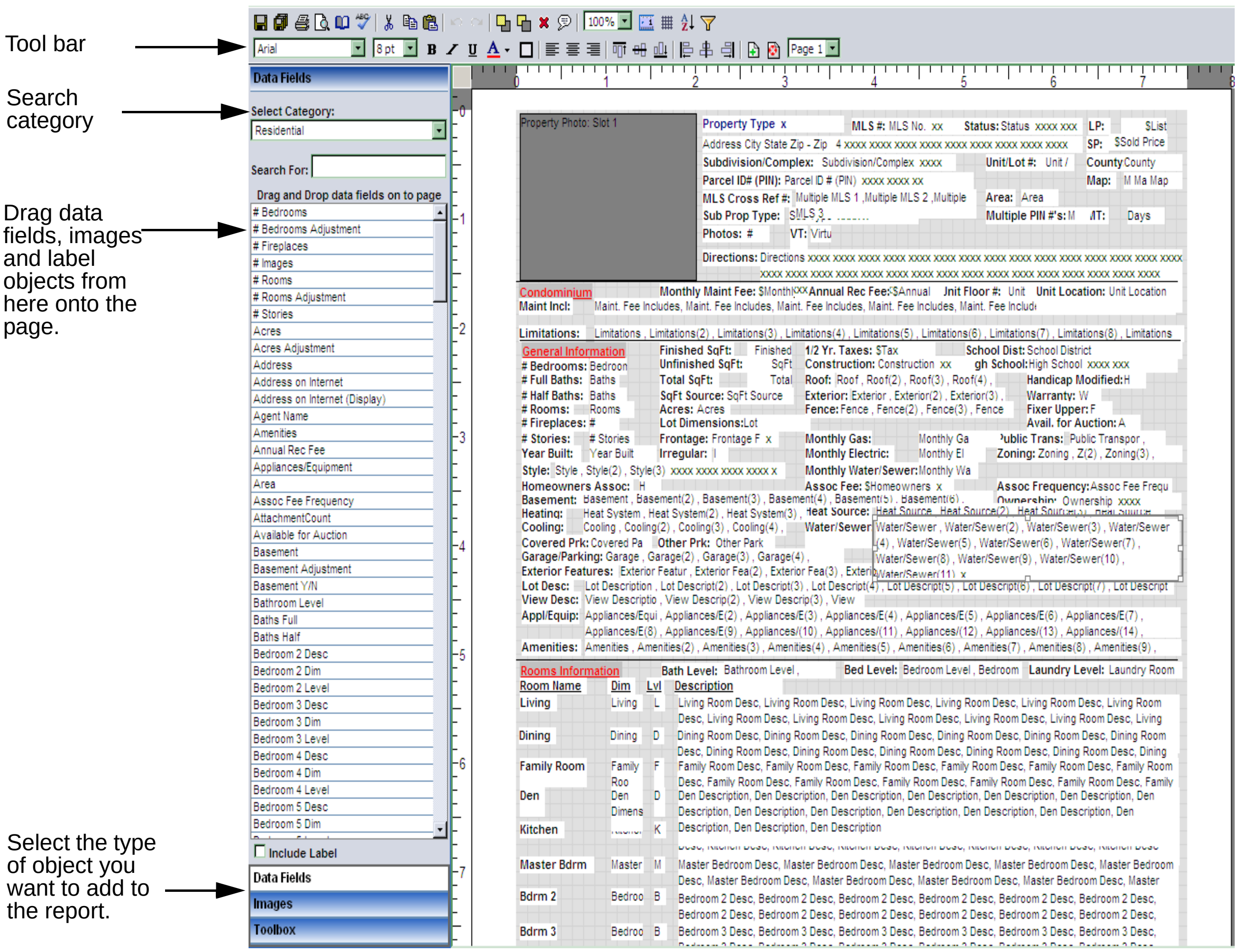
Using the Report Editor

The Report Editor enables you to design new reports or modify copies of System reports. You can apply word processing-like formatting, insert data fields, objects and more.

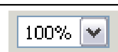
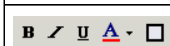
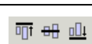
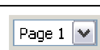
To access and use the Report Editor:

1. From the Report Manager page:
   - click **New** to create a new personal report; or
   - click **Edit** to modify a copy of a system report

   The online Report Editor opens.



NOTE! *Using the mouse, point to any tool bar icon to see a description of what it does.*

Icon	Description
	**Save** — Saves changes to an existing report. **Save As** — Lets you copy the report and save it under another name. **Print** — Sends the report to the printer.
	**Preview** — lets you search for a listing, then preview your report using the information.
	**Page Setup** — Select page size, orientation and set margins.
	**Spell Check** — Lets you check the spelling of labels on the report.
	**Cut, Copy and Paste** — Cut or copy selected text to the clipboard. Paste or insert the clipboard text at the cursor's insertion point.
	Undo, **Redo** — Lets you undo an action or redo an action (to 1 level).
	**Bring to Front**, **Send to Back** — Layer objects or groups of objects from front to back. **Delete Object** — Delete a selected object. **Object Property** — Lets you view the property settings for the selected object.
	**Zoom** — Change the page viewing size.
	**Show/Hide Rulers** — Turn rulers on or off.
	**Gridline Options** — Displays the Grid Properties dialog box, letting you adjust the **Grid Spacing**, and enable/disable the **Grid Options**: **Grid Visible** or **Snap to Grid**.
	**Font and Size** — Select the font name and size (in points).
	**Bold, Italic, Underline, Font Color, Outside Border** — Add attributes to selected text. Put a box around a selected object.
	**Align Left, Center, Align Right** — Aligns selected text.
	**Align Tops, Align Middles, Align Bottoms** — Aligns selected objects.
	**Align Lefts, Align Centers, Align Rights** — Aligns selected objects.
	**Add/Delete Page** — Append a new page to the report. Remove a selected page from the report.
	**View Page** — Select a page to view from multiple report pages.

Setting Up a Report Page

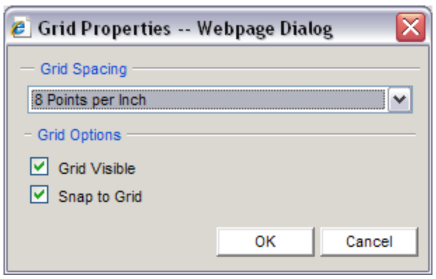
To produce a well-designed report, use the available guidance tools, like grids and rulers, to accurately line up page elements.

To set up your work space settings:

1. Select a zoom level from the **[xxx%]** drop-down list.

   The view size is adjusted accordingly.
2. Click the **Gridline Options** tool bar icon.

   The Grid Properties dialog box opens.



NOTE! *The grid lines are only a design aid; they are not part of the report and will not be displayed when viewing or printing the final report. The grid lines also indicate the usable page area as determined by the **Margins** setting under Page Setup. Objects cannot be placed or moved outside the grid area.*

3. Set the following grid properties, then click **OK**:
   - **Grid Spacing** — click the drop-down list and select a grid size, for example, 8 Points per inch.
   - **Grid Options** — select the **Grid Visible** check box to display or hide the grid. Click the **Snap to Grid** check box to make objects automatically line up with the grid line intersections when they are moved or resized on the report page.
4. Click the **Rulers** tool bar icon to display (or hide) rulers at the top and to the left of the page.

To set up the report parameters:

1. Click the **Page Setup** icon.

   The Page Setup dialog box opens.
2. Select:
   - **Page size** — Letter or Legal.
   - **Orientation** — Portrait or Landscape.
   - **Margins** — Top, Bottom, Left and Right.
3. Click **OK**.
4. Click the **Select category** drop-down list and choose a type of report.

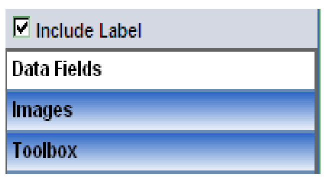
The corresponding data fields are displayed in a list on the left side.

To manage report pages:

1. Click the appropriate tool bar icon:
   - **Add Page** — a new blank page is appended to the end of the report.
   - **Delete Page** — deletes the page you are currently viewing and all of its contents.
2. To view a specific page number (other than the one you ar currently working on), select the page number from the drop-down list.

Working with Objects

Text labels, maps, charts, and image files that can be placed on the report page are all considered "objects" and are categorized into three groups: **Data Fields**, **Images**, and **Toolbox**.



Toolbox objects enable you to add the following features to your report:

- Text boxes
- Lines
- Frames
- The date on which the report is generated
- The time at which the report is generated
- Page number
- Page count
- Maps
- Charts
- Showing time
- Inline frames

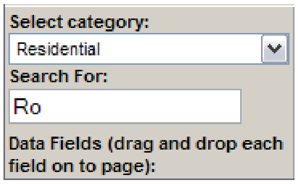
To add Data Fields:

1. Click **Data Fields** in the category list at the bottom left corner of the page.

   The available field names are displayed in the list.
2. Select the **Include Label** check box to ensure that when you drag data fields onto the form, the names (or labels) go also.

   *Note: It is recommended you select the **Include Label** check box.*

3. To help you search for a data field, enter the first few letters in the **Search For** field to narrow the list to where your label is located.



4. Click and drag one or more data field objects from the list onto the page.

   Note: This is where it's nice to have the grid lines and rulers displayed for easy line-up.

5. Use the tool bar buttons as needed.

To add Images:

1. Click **Images** in the category list at the bottom of the left column.
2. Click the **Select category** drop-down list at the top of the left column and choose an image type (for example **Agent Image**, **MLS Image**, etc.).

   *Note: Select the **image slot number**, if required.*

   The corresponding image merge codes appear in the list.

3. Click and drag one or more image merge code objects from the list onto the page.

   A box representing an image appears on the form.

   - Some image categories have the **Manage images** link to help add, edit or delete images from the database. The TEMPO 5 image submission window opens. See *"Managing Images" on page 293*.

4. Use the tool bar buttons as needed.

To add Toolbox objects:

1. Click **Toolbox** in the category list at the bottom of the left column.
2. Click and drag a toolbox object from the list onto the page.

   Note: Depending on the object you select, a dialog may open to request more information.

3. Use the tool bar buttons as needed.

To select one or more objects on a page:

NOTE! *An object must be selected before you can delete it or modify its properties.*

1. Click the object once.

   The object appears 'outlined' to indicate that it is selected.

   - to select a group of objects, hold down the ***CTRL*** key while clicking on additional objects.

2. Another way to select a group of objects is to click and drag on an empty area of the page to create a "selection rectangle."
   - extend the rectangle around the objects that you want to select. When you release the mouse button, the objects within the rectangle remain selected.

NOTE! *Selecting a group of objects is very useful when you want to apply the same changes to multiple objects at the same time. For example, you can select a group of text objects and then use the Font and Font Size controls to change these properties simultaneously on all of the selected objects.*

To delete an object:

1. Select the object you want to delete.
2. Click the **Delete** icon or press the ***DELETE*** key on your keyboard.

   A message box opens, prompting you to confirm the deletion.
3. Click **OK**.

To change the size of an object:

1. Select the object you want to modify.

   Each side and corner of the object's selection box displays a small white square (called a 'handle').
2. Click a handle and drag it in any direction to resize the object.

NOTE! *Any portion of an image or text that extends beyond the object's borders will be cut off when displayed or printed. Ensure that the object is large enough to accommodate its contents.*

To change the position of an object:

1. Place the cursor over an object until the mouse pointer becomes a four-way arrow.

   Note: For a Label Object, place the cursor over the edge of the object (but NOT over a handle) to make the mouse pointer become a four-way arrow.
2. Click and drag the object in any direction to reposition the entire object.
3. If two or more objects overlap, specify which object is on top and which is on the bottom using the **Bring to Front** and **Send to Back** icons.
   - select the object you want to bring forward or send back and click the appropriate icon.

   Note: This feature can be especially useful when overlapping images to create an artistic effect.

To align a group of objects:

1. Select the group of objects that you want to align as described above.
2. Click one of the **Align** icons.

The selected objects are aligned according to the selected aspect. For example, if you click the **Align Lefts** icon, all of the selected objects will be moved to the left so that their left edges line up with the edge of the left-most object.

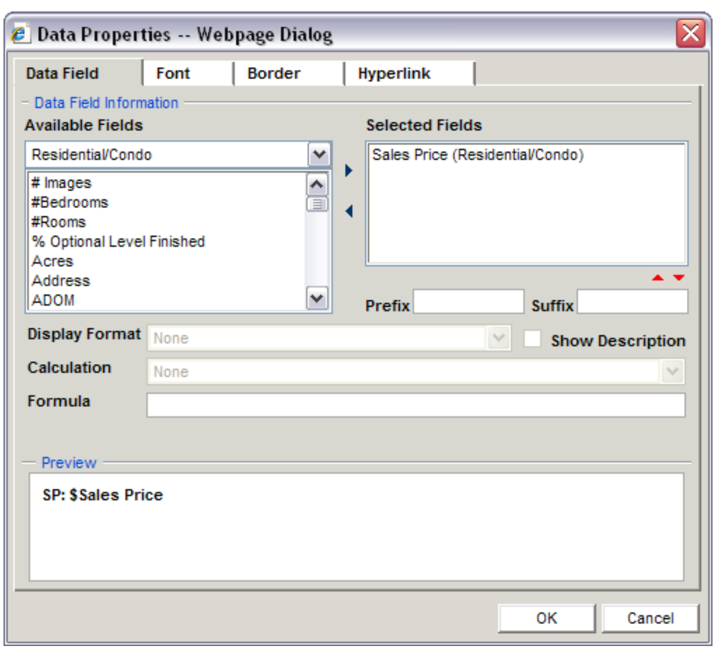
To change an object's text formatting:

1. Select the text object(s) that you want to modify.
   - If you are working with a single Label Object, you can use the cursor to highlight and format just a portion of the label's text.
2. Use the tool bar drop-down lists to select a font and point size for the text.
3. Click the **Outside Border** icon to create a black border around the text.
   - use the object handles to change the border size dimensions. Click the icon again to remove the border.
4. Click the **Font Color** icon to change the text to the currently selected color.
   - click the drop-down list to select a new color from the Color window, then click **OK**.
5. Click the **Bold**, **Italic** and **Underline** icons to apply these effects to the text.
   - click the icons again to remove the effect.
6. Click the **Align Left**, **Center** and **Align Right** icons to change the justification of the text within the boundaries of the text object.

To work with a selected object's properties:

1. Select an object, then click the **Object Property** toolbar icon; or double-click the object.

   The Data Properties dialog box opens.



2. Click one of the tabs:

- **Data Field** — this tab lets you work with the data field information, including two fields that let you append a **Prefix** or **Suffix** to the fields.
- **Font** — this tab lets you work with border style, width and color.
- **Hyperlink** — this tab lets you enter several types of links: **Navigation** or URL address, **E-mail Link**, **Data Field Links** (for URLs contained in a data field), **Smart Links** (such as DigiMap Tax) or **Report Links** (Listing reports, Media Viewer > Attachments, Show Map, etc.).

3. Click **OK**.

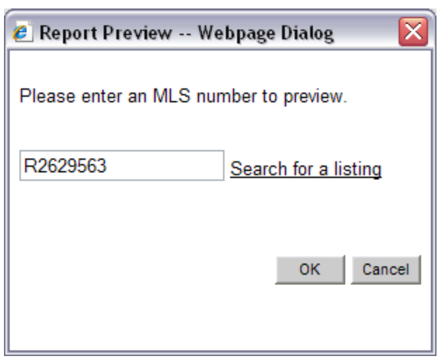
Previewing a Report

You can get a sense of what your report design will look like when viewed with real data. When you retrieve a listing record, it's data will replace the data fields on the report template.

To preview a report from Report Editor:

1. From the Report Editor page, click the **Preview** toolbar icon.

   The Report Preview dialog box opens.



2. Click the **Search for a listing** link to search for and retrieve a listing.

   The MLS number appears in the text box.
3. Click **OK**.

   The Report Preview page is displayed showing real data from the MLS.
4. Use the toolbar to scroll between multiple pages, zoom in or out, and print the report preview.

Printing a Draft of the Report

You can get a sense of what your report design will look like when printed, and make changes accordingly.

To print the report from Report Editor:

1. From the Report Editor page, click the **Print** tool bar icon.

A standard Windows Print dialog box opens.

2. Choose any additional report options (e.g., number of copies, destination printer, etc.), then click **OK** to print the report. See *"Printing" on page 265*.

NOTE! *Reports printed directly from the Report Editor will not show any property information, images, or other data. Merge codes and image placeholders will print exactly as shown on screen.*

To complete the report:

1. When you are satisfied with the report, click the **Save** icon.
2. Enter the **Report Name** and the optional **Report Description**.

   *Note: If this page is just for use with CMAs, select **Make this report only available for CMAs**.*
3. Click **OK**.
4. Click **Close** to return to the Report Manager page.

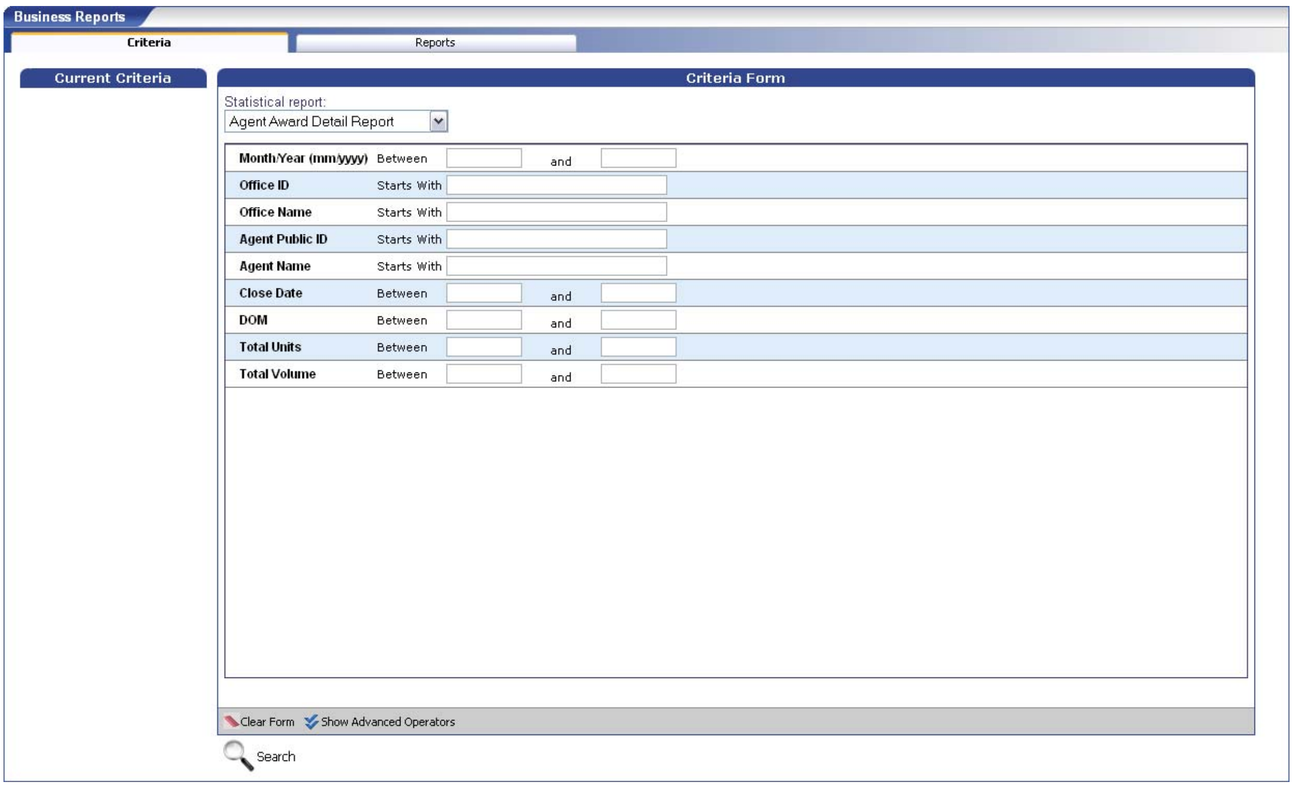
Running Business & Statistical Reports

Reports help you track clients and manage your business. Statistical reports include information such as office inventory, market share and penetration, and home sales.

To run a statistical report:

1. From the main menu, click **Reports > Business Reports**.

   The Business Reports Criteria page opens.



   While more limited in some ways, this page is similar to the listing Search Criteria page. See *"Using the Search Criteria Page" on page 68*.

2. Click the **Statistical report** drop-down list and choose the type of report to create.
3. To build a more advanced search or change the search operator(s), click the **Show Advanced Operators** button in the footer bar.

   The Boolean operator drop-down lists are displayed. See *"Creating More Advanced Search Queries" on page 68*.

4. Build your search query by entering the appropriate criteria in the fields. See *"Field Related Controls" on page 19*.

NOTE! *The available search criteria fields are different for each statistical report type.*

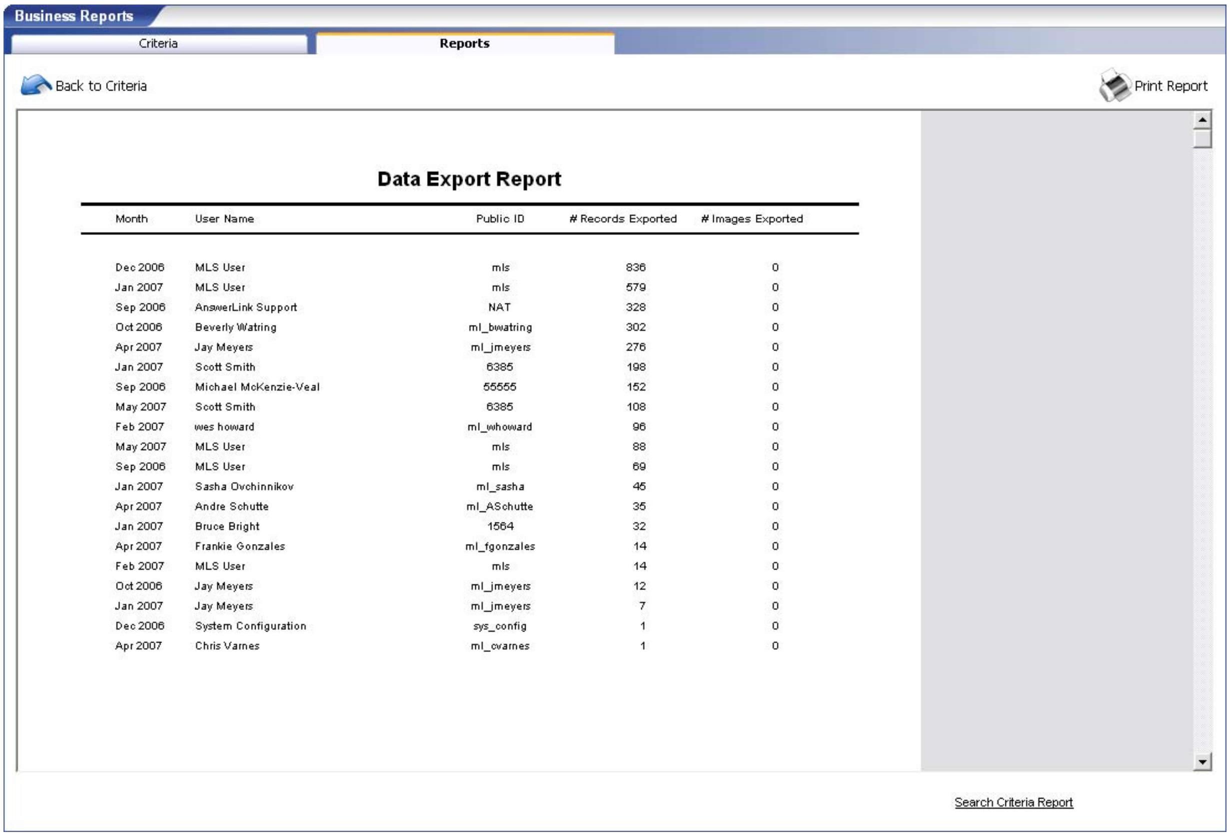
5. Click the **Search** button.

A dialog box is displayed, showing the number of records that match your search criteria.

NOTE! *The larger the number of matching records, the longer the statistical report will take to generate.*

6. Click **OK**.

   The Reports page opens.



Data Export Report

Month	User Name	Public ID	# Records Exported	# Images Exported
Dec 2006	MLS User	mls	836	0
Jan 2007	MLS User	mls	579	0
Sep 2006	AnswerLink Support	NAT	328	0
Oct 2006	Beverly Watring	ml_bwatring	302	0
Apr 2007	Jay Meyers	ml_jmeyers	276	0
Jan 2007	Scott Smith	6385	198	0
Sep 2006	Michael McKenzie-Veal	55555	152	0
May 2007	Scott Smith	6385	108	0
Feb 2007	wes howard	ml_whoward	96	0
May 2007	MLS User	mls	88	0
Sep 2006	MLS User	mls	69	0
Jan 2007	Sasha Ovchinnikov	ml_sasha	45	0
Apr 2007	Andre Schutte	ml_ASchutte	35	0
Jan 2007	Bruce Bright	1564	32	0
Apr 2007	Frankie Gonzales	ml_fgonzales	14	0
Feb 2007	MLS User	mls	14	0
Oct 2006	Jay Meyers	ml_jmeyers	12	0
Jan 2007	Jay Meyers	ml_jmeyers	7	0
Dec 2006	System Configuration	sys_config	1	0
Apr 2007	Chris Varnes	ml_cvarnes	1	0

7. To browse through multiple pages, click the arrow buttons at the bottom left of the scrollable portion of the window.
8. To view a printable report of the search criteria used to generate this statistical report, click the **Search Criteria Report** link. See *"Using the Search Criteria Page" on page 68*.
9. To return to the Search Criteria page, click the **Back to Criteria** link.
10. To print the statistical report, click **Print Report**.

    A standard Windows Print dialog opens. See *"Printing" on page 265*.

Types of Statistical Reports

The following reports are available in one form or another to most TEMPO 5 users. Variations in name, content, and format should be expected.

Agent Award Detail Report

To verify Agent Awards, this report calculates an agent's total number of properties and dollar volume on the List/Sell sides of transaction activities. Showing one agent per page, the report provides detailed listing information including the ML#, Address, number of agents involved, units, volume, sale price, close date, and DOM.

Agent Market Share Report

This report ranks all agents in the MLS by their monthly performance, based on the number of sold properties, as per the property types specified in the search criteria. The report displays each agent's rank, number of properties sold, the percentage of the report's total listings that the agent possesses, the sales volume, the average and median sale prices. The report also lists these stats for the List Side.

Data Export Report

This reports displays the number of records and images exported by each user for the specified period of time.

Dollar Value Report by Area

This report provides the total number of listed properties, with their total, average, and median list price values. The report is sorted by area, as per the criteria selected in the search.

Firm Activity By Month

Showing one firm per page, this report lists the number of active, new, sold, pending and expired property types, along with the ($) volume for each category for the month. A total of all columns appears at the bottom of the report.

Home Sales Report

This Real Estate Trend Indicator report displays the number of listings, by number of bedrooms, per price class (not user-configurable), along with the average price and volume for residential and condominium data as per the criteria specified in the search. The report also includes DOM and financing information.

Inventory Report By List Price

This report provides listing information in an inventory format sorted by list price. Summary information at the bottom of each report page displays a Price Comparison by showing the Average, Median, Minimum and Maximum listing prices, in addition to the total number of listings included in the report.

Inventory Report By Status

This report provides listing information in an inventory format sorted by property status. Summary information at the bottom of each report page displays a Price Comparison by showing the Average, Median, Minimum and Maximum listing prices, in addition to the total number of listings included in the report.

Inventory List by Expiration Date

The Inventory Report by Expiration Date provides listing information in an inventory format sorted by expiration date. Summary information at the bottom of each report page displays a Price Comparison by showing the Average, Median, Minimum and Maximum listing prices, in addition to the total number of listings included in the report.

Inventory List by Office

The Inventory Report By List Broker report provides listing information in an inventory format sorted by the listing office. Summary information at the bottom of each report page displays a Price Comparison by showing the Average, Median, Minimum and Maximum listing prices, in addition to the total number of listings included in the report.

Login Summary Report

This report is used to compare the number of user login counts for TEMPO 5 and RETS on a monthly basis. This report is not broken down by Association.

Market Activity Report by Area

The MAR report calculates the total number of Active, New, Sold, Expired, Off-Market and Pending property listings in each area on a monthly basis.
The report also shows the Average List Price and Average Sales Price for each area.

Market Activity by Sub-Sub-Area

This MAR report calculates the total number of Active, New, Sold, and Off-Market property listings in each sub-area per month. The report also shows the Average and Median list prices for each property status.

Member Application Usage Report

This report can be used to see who has logged in and when, by month. This report contains the Public ID, Member name, date, number of logins, total session time (in minutes) and average session time.

Member Login Report

This report can be used to identify heavy users by month by providing the total login count for each user for TEMPO and RETS. The report is broken down by

Association and product and contains the Public ID, Office Code, First and Last name of the user, E-mail address, and the dates of first and last logins.

MPA Report By Broker & Area

The Market Penetration Report calculates a percentage (of market) based on the number of Active or Sold listings per broker vs. the MLS listing database for each area. It also calculates a percentage based on the total listing price (broker) vs. total listing price (MLS).

Office Market Penetration Report — Active Listings

This report ranks office performance by calculating the number of active listings for each office vs. the MLS. It also calculates office volume listings vs. the MLS listings by area (i.e., the office and the MLS are compared on an area-by-area basis). Each office's results appear on a separate page.

Office Market Penetration Report — Sold Listings

This report ranks office performance by calculating the number of sold listings for each office vs. the MLS. It also calculates office volume, average sale price, and the percentage of the total sales that the office processed by area, for both the List and Sell sides. Each office's results appear on a separate page.

RETS Member Login Report

This report provides the number of total login counts for RETS and TEMPO 5 on a monthly basis, for members, from first login to last login. The report lists the Public ID number, Office Code, member name and e-mail address.

Public Records

Searching for Tax Information

NOTE! *The Tax Search feature or some of its components may not be available in all areas.*

The TEMPO 5 tax search function lets you find public record information for virtually any property. You can define specific criteria to retrieve information for a specific property, or you can perform a broad search to retrieve multiple properties.

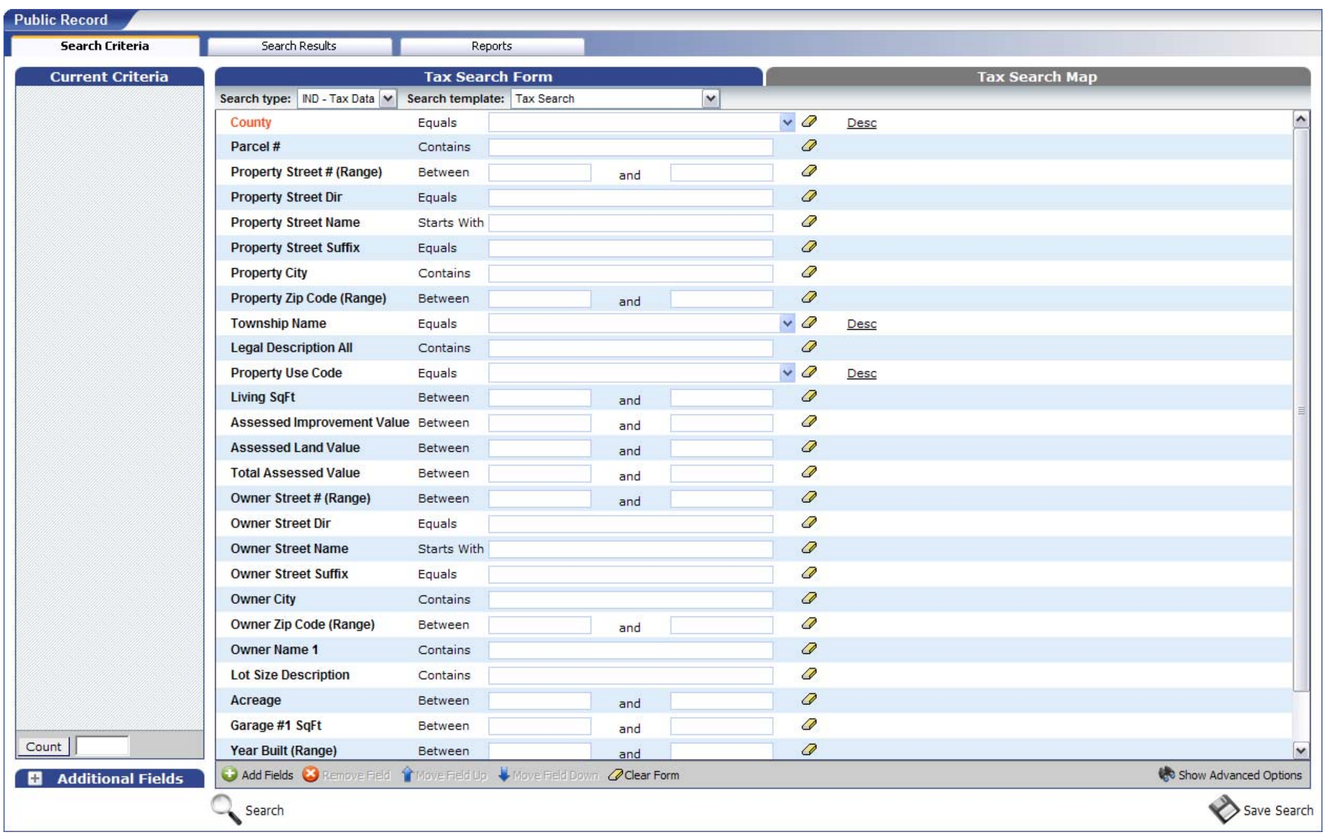
Obtain land registry information, tax and deed data, as well as property features and descriptions for your client. Tax information should be available regardless of whether or not a property is currently listed. See *"Listing Manager" on page 111*.

NOTE! *You may see a Tax Search form that operates like any other Search Criteria page in TEMPO 5. Enter the search criteria and perform a search. See* *"Searching" on page 63**. Or you may have a link to third-party software that has its own search functionality.*

To search for tax information using the tax search criteria page:

1. From the main menu, click **Public Records**.

   The Tax Search Criteria page opens.



2. Click the **Search type** drop-down list and select a search type consistent with the county or area in which you want tax information.

3. Click the **Search template** drop-down list and select a search template, such as **Tax Search**.
4. Complete the fields on the Search form. Required fields appear in red text.
   - use the footer bar controls to add, remove, move fields on the page. See *"Using the Search Criteria Page" on page 68*.
5. Click the **Count** button in the sidebar to see how many records match your criteria. If there are too many, revise the search criteria.
6. Click the **Tax Search Map** tab to perform a map search. See *"Searching by Map Area" on page 221*.
7. Click one of the action buttons to perform a task:
   - **Search** — displays the Search Results page with all matching records. Proceed to step #8.
   - **Save Search** — opens the Search Settings page so that you can save the search for re-use. See *"Saving a Search" on page 73*.
8. From the Search Results page, select one or more tax records, then:
   - click the **Columns** drop-down list to select another format for the data. See *"Managing Column Reports" on page 318*.
   - click the **Save Grid** icon to save any changes you may have made to the search grid.
   - click the **Filter** drop-down list to apply a simple filter to the list. See *"Viewing, Sorting and Filtering" on page 22*.
   - click the **Multi-Field Sort** button to apply a filter to the data. See *"Viewing, Sorting and Filtering" on page 22*.
   - use the footer bar controls to re-order a selected record in the list or to show the search criteria.
9. Click the action buttons to perform more tasks:
   - **Revise Search** — takes you back to the Search Criteria page so you can modify your search criteria.
   - **Map** — opens the Map View page so you can see the property locations. See *"Viewing a Map of Listing Search Results" on page 223*.
   - **Download** — lets you export selected tax records. See *"Exporting Data from TEMPO 5" on page 330*.
   - **Print** — lets you preview and print one or more tax reports. In addition, you have the option to save the document in a Portable Document Format (PDF). See *"Saving a Report as a PDF Document" on page 269*.
10. To choose the type of report you want to generate, click the **Details** tab.

Viewing Tax Details

From the Search Details page you can choose from several different tax report formats, then scroll through multiple tax reports for on-screen viewing. In addition, you can preview what the report will look like when printed, then send it to the printer or save it as a PDF file.

To view a tax report:

1. If you want to change the type of tax report from the Reports page, click the **View** drop-down list and choose one of the available report types, for example **Owner Mailing Label**.
2. To view reports for multiple properties, click the **Previous** [] and **Next** [] arrow buttons at the top of the page to scroll through the different tax records; or select an address from the drop-down list in the top left corner.
3. Use the links in the **Quick Link Button Bar** to perform more tasks:
   - **Tax** — displays the tax reports for the selected listings.
   - **Map View** — displays a map view for the selected listings.
   - **Driving Directions** — displays the Plan Route pop-up dialog box, letting you get directions to the selected listings.
   - **History** — displays a property history report (if any) for the selected listings.
   - **Listing** — displays listing details (if any).
4. Use the action buttons to perform more tasks:
   - **Back to List** — takes you back to the Search Results page.
   - **Other Tax** — if more details are available for the selected tax record, they can be accessed from here (may not be available in your area).
5. Click the **Print Report** button to select which reports (or pages of) to preview, print or save as PDF. See *"Printing" on page 265*.

Adding Tax Information to a Listing

When you add a new listing from the Listing Manager, you have the opportunity to add tax information by:

- using the Tax Autopop Selection pop-up window to search for a tax record based on a specified tax provider, county, and Tax ID number; or
- use the tax search function (as described herein) to search for a record.

Either way, you can complete most of the tax-related fields on the listing property. See *"Using the Tax Auto-pop Feature" on page 118*.

Financials

Buyer and Seller Net Sheets
Using the Payment Calculator
Loan Comparisons
Loan Qualification
Rent vs. Buy

Financial Functions

TEMPO 5 offers a variety of useful financial tools that make it easy to calculate loan payments, as well as estimate closing costs and net proceeds from a sale.

To access the financial functions:

1. From the main menu, click **Financials**.

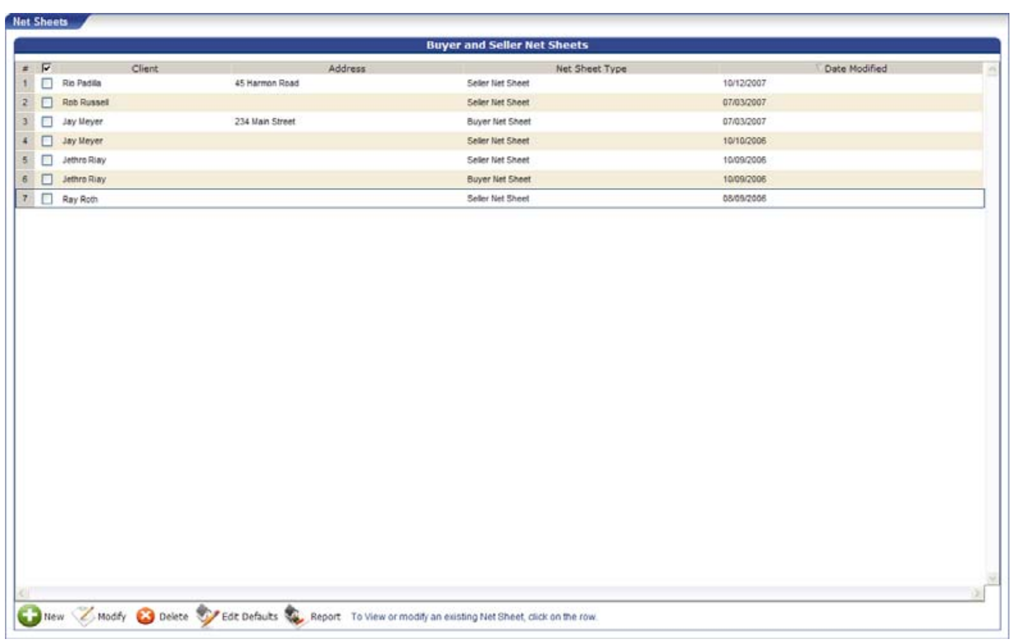
2. Click the menu item you want to work with.

Buyer and Seller Net Sheets

Prepare Net Sheet reports that itemize expenses and calculates the estimated closing costs for buyers; or payouts for sellers. From the Buyer and Seller Net Sheets page, you can view, add, edit or delete netsheets.

To view or modify an existing Buyer or Seller Net Sheet:

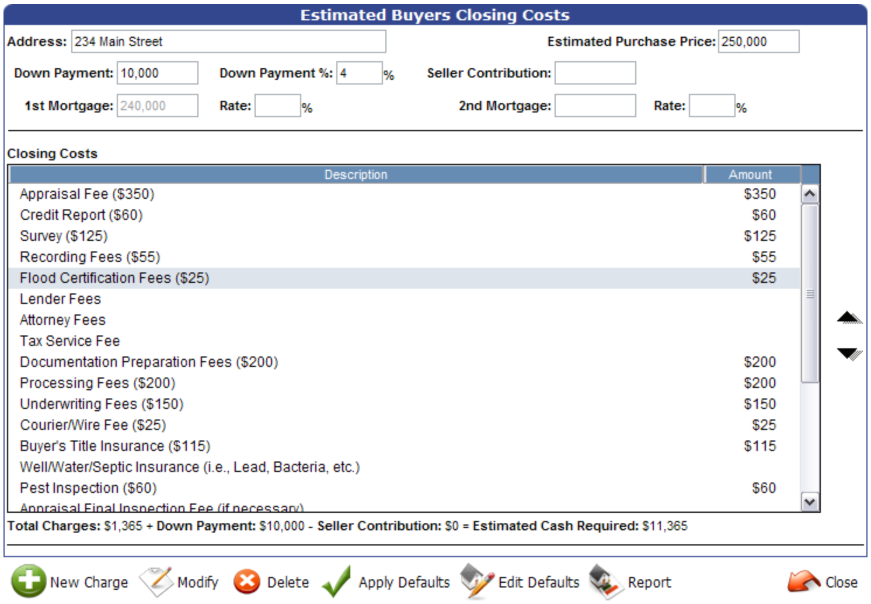
1. From the Buyer and Seller Net Sheets page, click a column to sort the list in ascending or descending order.



2. Select a net sheet from the list.

3. Click **Modify** (or simply click the row).

   The Net Sheet Information pop-up window opens.

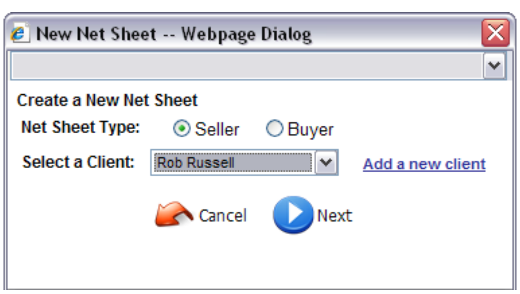


4. Click the action buttons to add or modify the list of charges and/or defaults associated with this net sheet. See *"Adding and Editing a New Charge" on page 163*.
5. Click **Close**.

To create a new Buyer or Seller Net Sheet:

1. From the Buyer and Seller Net Sheets page, click the **New** button in the bottom left of the page.

   The New Net Sheet dialog opens.



2. Choose the **Seller** or **Buyer** option.
3. Click the drop-down list and select a client.
   - Click the **Add a new client** link to enter new client information.
4. Click **Next**.
5. The appropriate Net Sheet Information page opens: Estimated Buyers Closing Costs or Estimated Sellers Net Proceeds. See *"Estimating Net Proceeds & Closing Costs" on page 161*.
6. Click **Close**.

To edit Net Sheet Default charges:

1. From the Buyer and Seller Net Sheets page, click the **Edit Defaults** button.

   The Net Sheet dialog opens.
2. Select the **Net Sheet Type**: **Seller** or **Buyer**.
3. Click **Next**.

   The Default Net Sheet Information page opens.
4. Make the necessary changes, whether to the Sellers Net Proceeds — Default Settlement Charges, or to the Buyers Net Sheet — Default Closing Costs.

   Note: Default costs are discussed in another section. See *"Setting Up Default Netsheet Information" on page 162*.
5. Click **Save**.

To delete a Buyer or Seller Net Sheet:

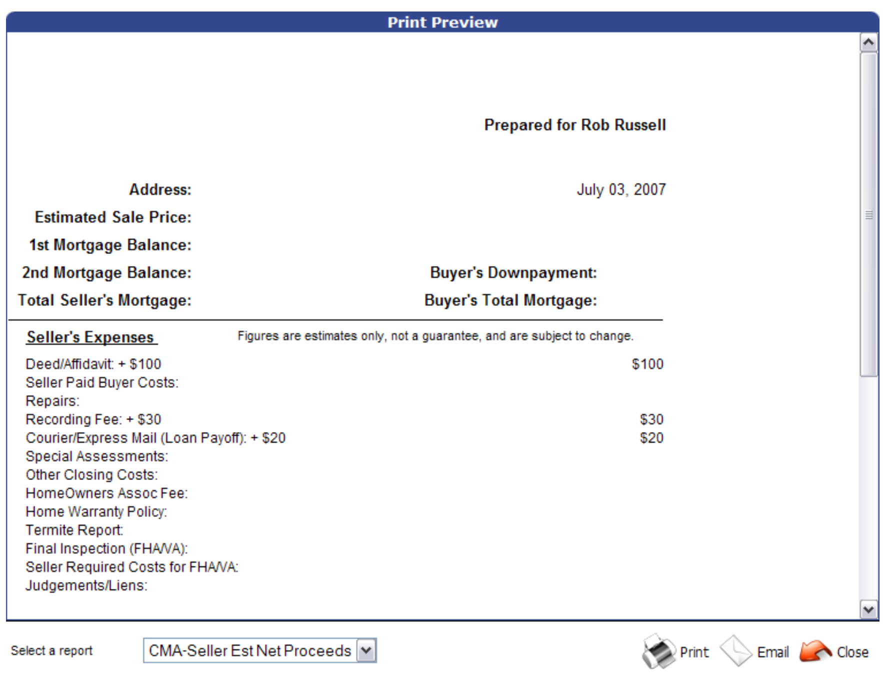
1. From the Buyer and Seller Net Sheets page, select one or more items in the list.
2. Click the **Delete** button.

   A message box appears, asking you to confirm the deletion.
3. Click **OK**.

To print the Buyer or Seller Net Sheet Report:

1. From the Buyer and Seller Net Sheets page, select an item in the list.
2. Click the **Report** button.

   The Print Preview page opens.



3. Click the **Select a report** drop-down list, in the bottom left of the page, and choose a report format.
4. Click:
   - **Print** — A standard Windows Print dialog opens. Choose your printing options, then click **Print**. See *"Printing" on page 265*.
   - **E-mail** — The Send E-mail pop-up window opens. See *"Sending E-mail" on page 130*.
5. Click **Close**.

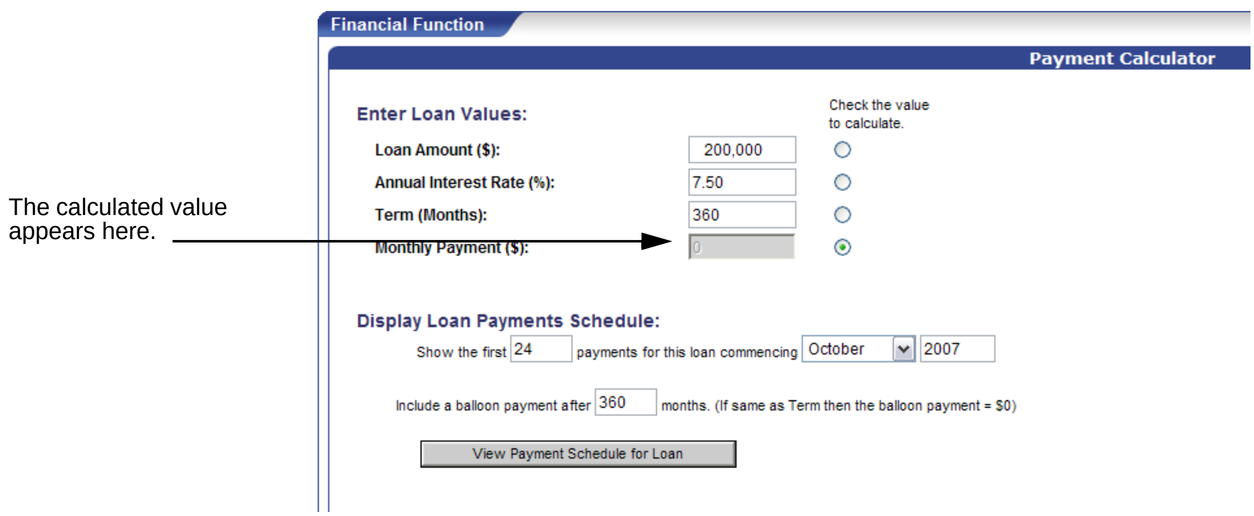
Using the Payment Calculator

The Payment Calculator lets you calculate estimated monthly loan payments as well as view and print a complete amortization schedule based on the number of payments and start date you specify.

To use the payment calculator:

1. From the main menu, click **Financials > Payment Calculator**.

   The Payment Calculator page opens.



2. In the **Enter Loan Values** section, select the **Check the value to calculate** option button next to the field you want to calculate. (For example, if you want to know the payment per month based on the loan amount, interest and term, click **Monthly Payment**).

   The field turns grey.
3. Enter the remaining values: **Loan Amount, Annual Interest Rate**, and **Term** fields.

   The monthly payment will be calculated based on these values.
4. Click the **Calculate Values** Action button, located at the bottom of the page.

   The calculated value is displayed.

5. In the **Display Loan Payments Schedule** section, enter the following information:
   - **Show the first [x] payments** — enter the number of payments
   - **commencing on [month] [year]** — enter the month and year of repayment
   - **include a balloon payment after [x] months** — enter the number of months, after which a balloon payment can be made. If the value is equal to the term, then the balloon payment is zero (0).
6. Click **View Payment Schedule for Loan** to view the related amortization table.

   The Loan Payments Schedule opens in a new Browser page.
7. Click the **Reset Values** Action button to clear the calculator so you can enter new values.
   - a message box opens prompting you to confirm. Click **OK**.

NOTE! *The **Print** Action button at the bottom of the Payment Calculator page will print the page itself, NOT the Loan Payments Schedule report.*

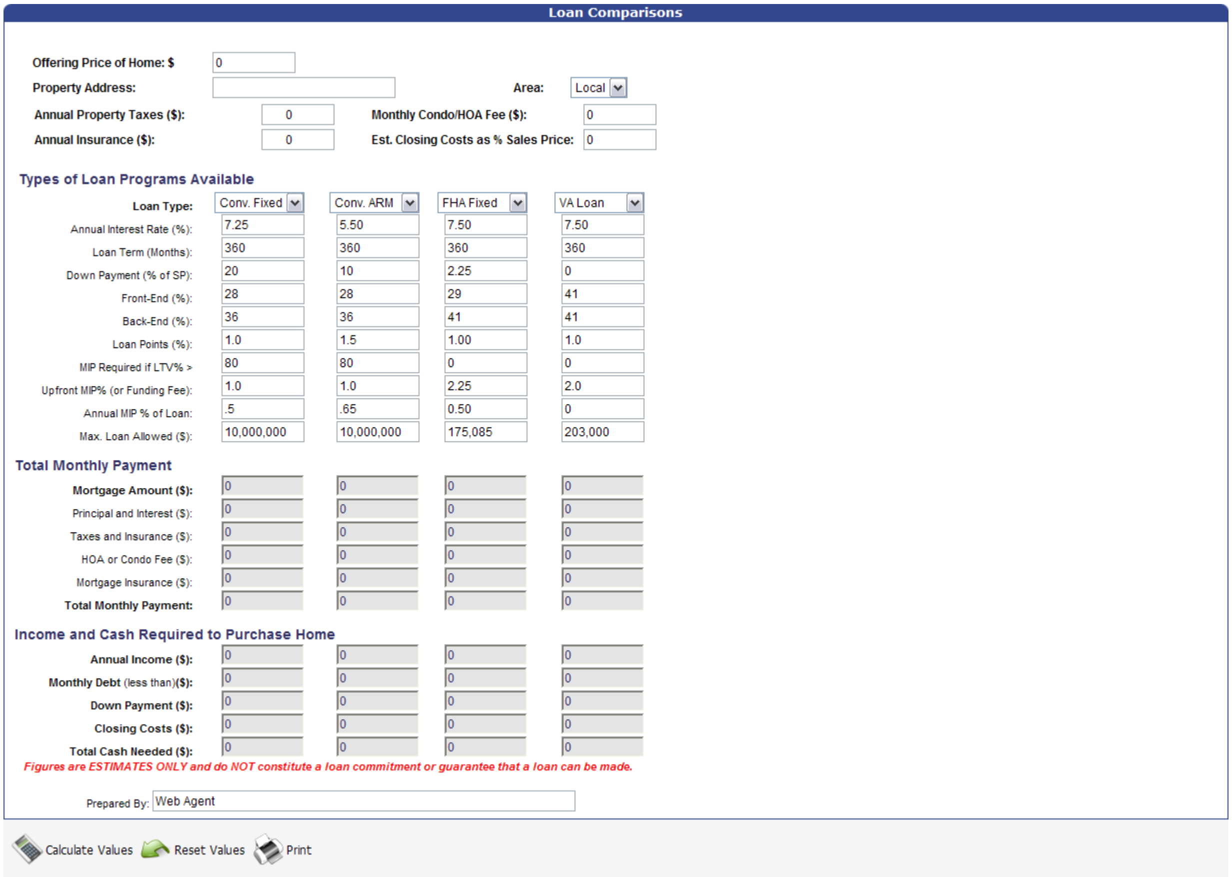
Loan Comparisons

The Loan Comparisons function lets you create and print a custom report showing the different loan options available to your client.

To compare loans and calculate the income required to qualify:

1. From the main menu, click **Financials** > **Loan Comparisons**.

The Loan Comparisons page opens.



2. In the top section of the page, enter:
   - **Offering Price of Home**, **Property Address** and **Area**, **Annual Property Taxes**, **Monthly Condo/HOA Fee**, **Annual Insurance**, and **Est. Closing Costs**.
3. Use the series of drop-down lists to set up four different **Types of Loan Programs Available**, then enter the loan information for each in the appropriate column.
4. Click the **Calculate Values** button.
5. Scroll down to the bottom of the report to see the estimated **Total Monthly Payment** and **Income and Cash Required to Purchase Home** values.

NOTE! *The calculated figures are estimates only and do not constitute a loan commitment or guarantee.*

6. Enter your name in the **Prepared By** field.
7. Click **Print**.

   A standard Windows Print dialog box opens.
8. Select any additional print options (e.g., number of copies, destination printer, etc.), then click **OK** to print the loan comparisons report. See *"Printing" on page 265*.

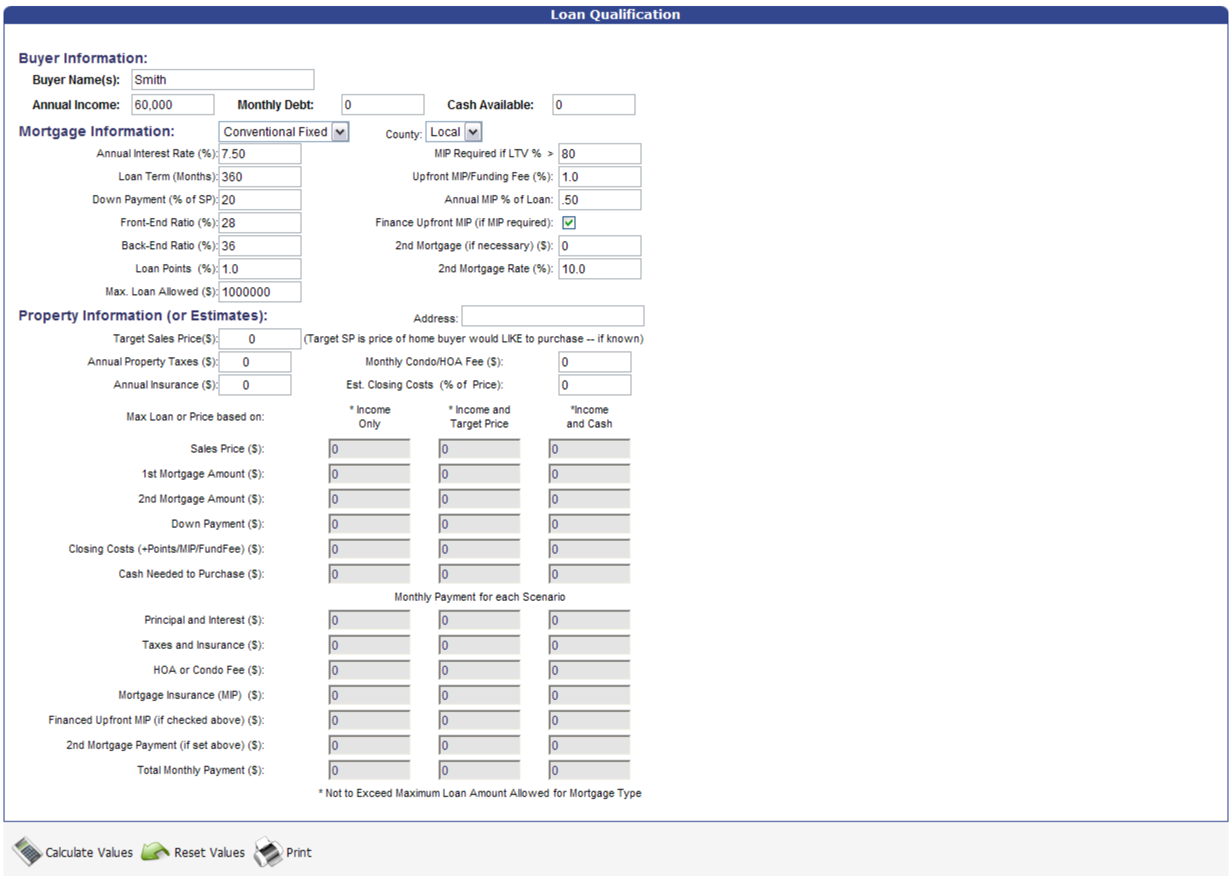
Loan Qualification

The TEMPO 5 Loan Qualification function lets you determine the maximum mortgage a buyer can qualify for, based on factors such as income, debt, down payment, and mortgage type.

To qualify a buyer for a loan:

1. From the main menu, click **Financials** > **Loan Qualification**.

   The Loan Qualification page opens.



2. In the **Buyer Information** section, enter the **Annual Income**, **Monthly Debt**, and **Cash Available**, as well as the **Buyer Name**.
3. In the **Mortgage Information** section, select a loan type from the drop-down list, then enter the **Annual Interest Rate**, **Loan Term**, **Down Payment %**, etc.
4. In the **Property Information (or Estimates)** section, enter the **Target Sales Price**, **Annual Property Taxes**, **Annual Insurance**, **Monthly Condo/HOA Fee**, **Est. Closing Costs**, etc.
5. Click the **Calculate Values** button.
6. Scroll down to the bottom of the report to see the qualification information.

NOTE! *The Income and Target Price column is blank unless you entered a Target Sales Price.*

7. Enter your name in the **Prepared By** field.
8. Click **Print**.

   A standard Windows Print dialog box opens.
9. Select any additional print options (e.g., number of copies, destination printer, etc.) and click **OK** to print the loan qualification report.

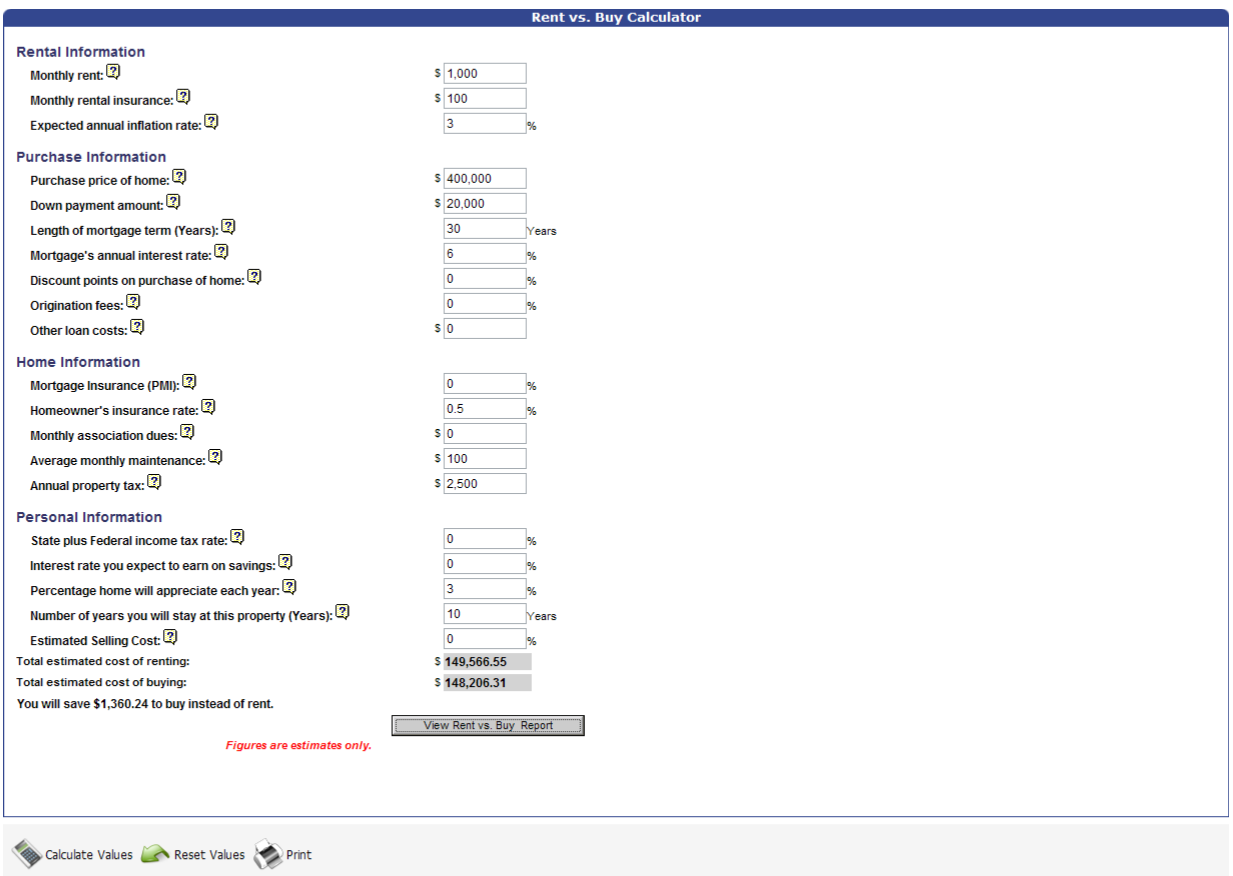
Rent vs. Buy

Use this financial calculator to compare the cost between renting and buying.

To calculate the difference between renting and buying:

1. From the main menu, click **Financials** > **Rent vs. Buy**.

   The Rent vs. Buy Calculator page opens.



2. In the **Rental Information** section, enter the values for **Monthly rent**, **Monthly rental insurance**, and **Expected annual inflation rate**.
3. In the **Purchase Information** section, enter the values for the purchase price of a home, down payment amount, etc.

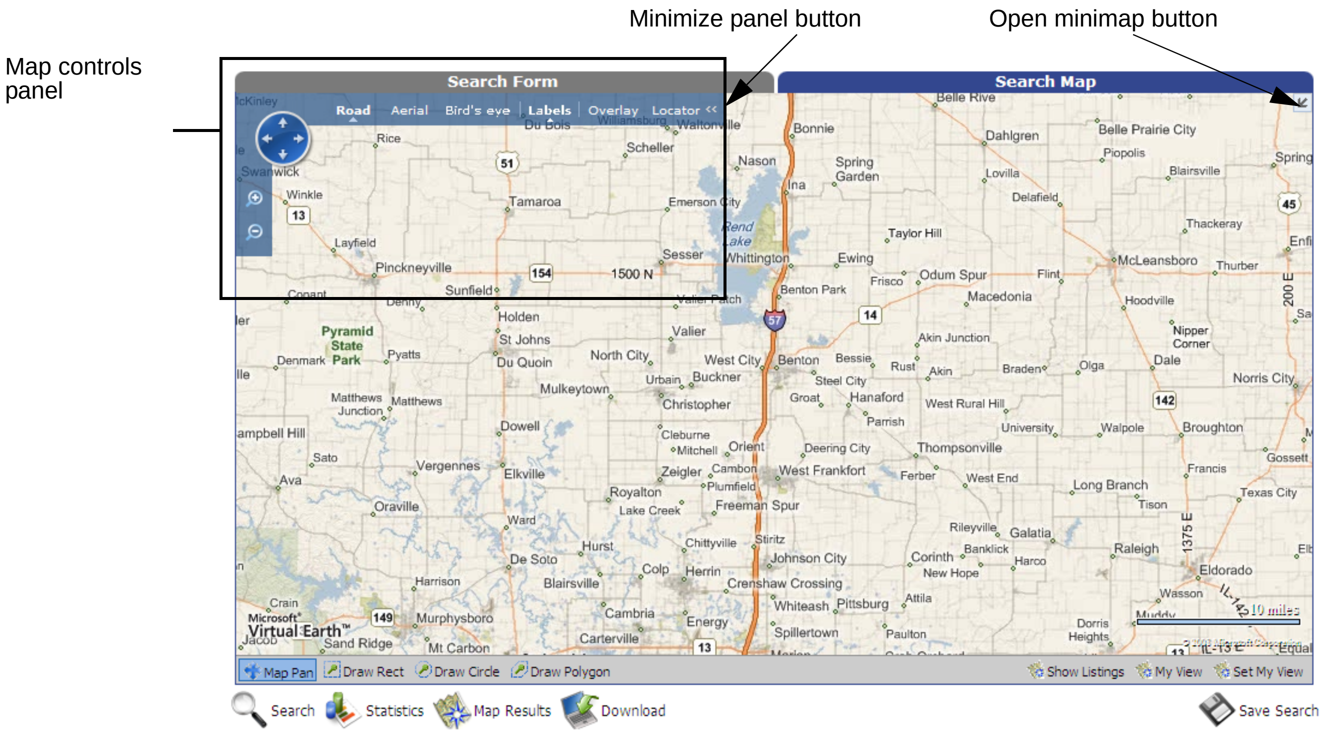
4. In the **Home Information** section, enter the mortgage insurance, homeowner's insurance rate, annual property tax, etc.
5. In the **Personal Information** section, enter the income tax rate, selling commission rate, etc.
6. Click the **Calculate Values** button.

   The **Total estimated cost of renting / buying** values are displayed, along with the savings (in $) to buy instead of rent.
7. Click the **Print** button to print the page (as is).
8. Scroll down to click the **View Rent vs. Buy Report** button.

   A formatted comparison report is displayed in a new Browser window.
9. Click the **Print report** link to print the formatted report.
10. Click **Close**.

Mapping

Using Map Controls and Views



The Map Controls Panel

The map controls panel is located in the top left corner of the mapping window. It contains the controls that enable you to adjust the map. If a control appears gray, it is unavailable and you cannot use it.

To minimize the map controls panel:

Click the minimize button [ ]. The panel will disappear, except for a restore button [ ]. Click this button to restore the map controls panel.

Views

Three map views are available:

- **Road**. A standard road map.
- **Aerial**. A satellite photo.
- **Bird's Eye**. Close-up satellite view using Microsoft's Virtual Earth™ technology. When working in Bird's Eye View, you can rotate the image (see *"Adjusting the Map (Pan, Zoom, and Rotate)" on page 217*). The draw search tools are not available in Bird's Eye view.

To change map views:

From the map controls panel, click **Road**, **Aerial**, or **Bird's Eye**.

Adjusting the Map (Pan, Zoom, and Rotate)

To pan the map:

Either

- From the map controls panel, click an arrow on the pan control []
- From the map footer bar, click **Map Pan** and then click and drag the mouse to move the map from side to side or up and down

To zoom in and out:

Click the zoom in [] and zoom out [] controls.

To rotate the image (Bird's Eye view only):

When you are working in Bird's Eye view, extra controls are available from the map control panel. These controls enable you to rotate the image. Either

- From the map controls panel, click a compass direction (**N**, **S**, **E**, **W**) on the bird's eye pan control [].
- From the map controls panel, click the rotate clockwise [] or rotate counterclockwise [] control (located below the zoom controls).

Map Labels

Map labels identify transportation features (streets, highways, toll highways, railways), political features (cities, capitals, state and provincial boundaries) and recreation and places of interest (golf courses, sporting venues, parks, shopping).

To turn map labels on or off:

From the map controls panel, click **Labels**.

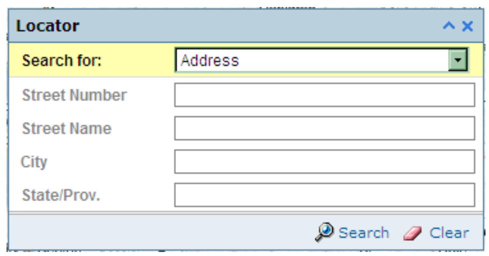
Note: You cannot turn off labels in Road view.

The Locator

The Locator enables you to find specific addresses, MLS numbers, zip/postal codes, businesses and points of interest on the map.

To use the locator:

1. Click **Locator** on the map control panel to open the Locator dialog.

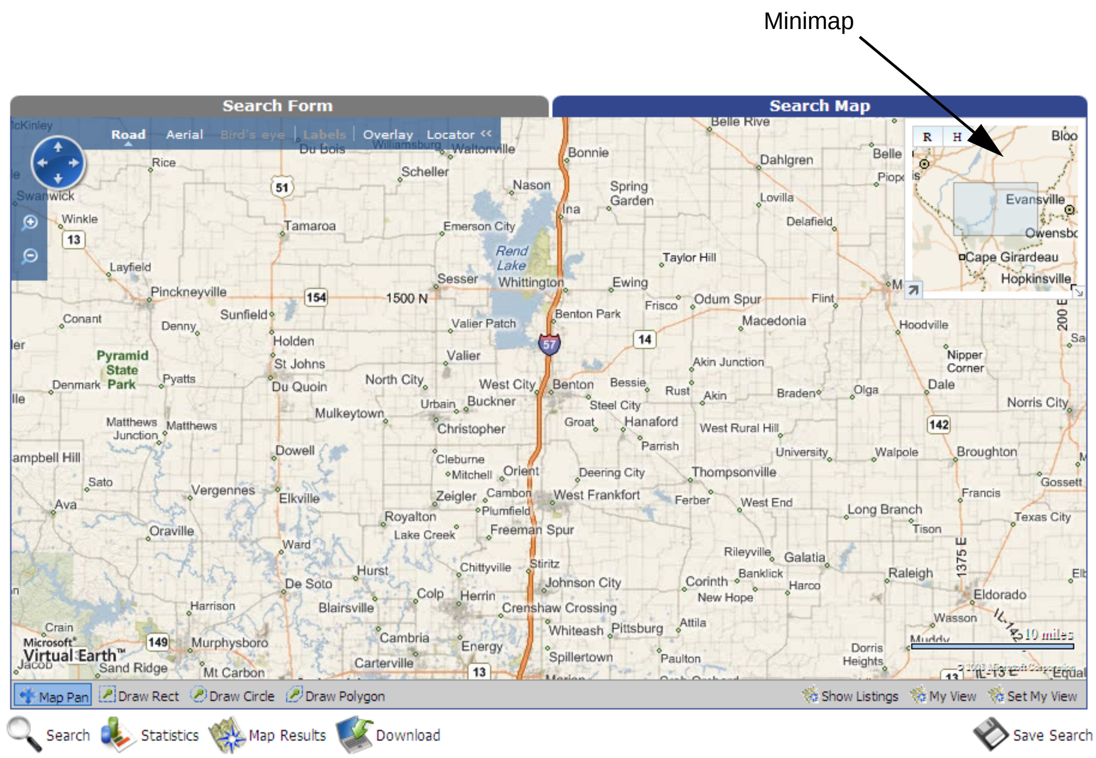


2. From the **Search for** menu, select the type of search you want to perform.
3. Enter search criteria.
4. Click **Search**.

   *Note: to zoom in to a specific county, type the county name (for example, "Pierce County") in the **City** or **State/Prov.** field.*

The Minimap

The Minimap is a small panel that displays a zoomed-out version of the current map view. The current map view is represented in the Minimap as a shaded rectangle.



To open the Minimap:

Click the Minimap button [ ] in the upper right corner of the map window.

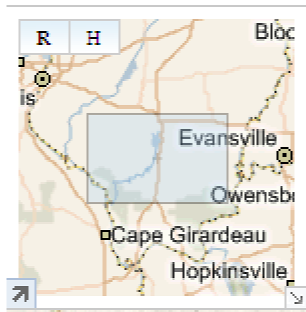
To close the minimap:

Click the close button [ ] in the lower left corner of the Minimap.

Minimap Views

Two Minimap views are available:

- **Road**. Traditional road map.
- **Hybrid**. Road map combined with satellite view.



Road view

Hybrid view

To change Minimap views:

Click the **R** button for road view; click the **H** button for hybrid view.

Navigating with the Minimap

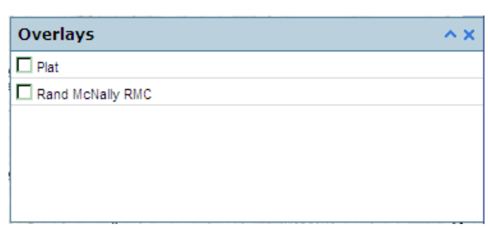
You can rapidly change the current map view by panning the Minimap: click and drag the mouse in the Minimap to pan up, down, right, or left. The map view in the main map window will move accordingly.

Overlays

If your MLS subscribes to third-party mapping data (such as Thomas Brothers Map Data), you may have an **Overlays** control in the map control panel.

To apply mapping overlays:

1. From the map control panel, click Overlays to open the Overlays dialog:



2. Select the check box next to the overlay(s) you want to apply. To remove an overlay, clear its check box.

Searching by Map Area

As an alternative to specifying your search area by entering area names or codes, TEMPO 5 allows you to graphically define the area you want to search by using a dynamic map.

NOTE! *If you try to specify an **Area** using both search criteria and the **Map Area** feature, no matching listings will be found unless the two areas overlap. If you are using search criteria, check the map page to ensure there are no defined areas you may have forgotten about.*

To search by map area:

1. From the Search Criteria page, enter information in the required fields on the Search Form, such as List Price, Market Code, etc.
2. Click the **Search Map** tab to open the search map.

Map Tools include: **Map Pan, Draw Rectangle**, **Circle**, or **Polygon**.

3. Use the map controls to adjust the size and view until you find the area you want to select (see *"Using Map Controls and Views" on page 216*):
4. To specify a search area, select one of the shape tools:

   Note: You can draw up to 3 shapes for a single search (does not apply to hotsheet searches).

   - **Draw Rect** — click and drag the mouse to draw a rectangle on an area of the map. When you release the mouse button, the boundary line turns blue in color.

- **Draw Circle** — click to establish a focal point, then drag the mouse until the radius measurement (distance in miles) is displayed. Click again to set the circle. The boundary line turns blue in color.
- **Draw Polygon** — click to establish the first point. Click for each point you want to add to the shape (up to a maximum of 10 points for regular searches or 20 points for hotsheet searches). Click the initial point to finish the polygon and set the final search area. The boundary line turns blue in color.

Note: If you exceed maximum number of points on the polygon, the shape you have just drawn disappears and the process begins again.

- **Clear Shape** — click the button; or click the [x] on the shape itself to clear the shape from the map.

5. Click the **Set my view** button in the footer bar to save the current map position and zoom as a default setting for future searches.
   - click **My View** to revert back to your default view.
6. Click one of the action buttons:
   - **Search** — performs a search of the specified map area. See *"Searching" on page 63*.
   - **Statistics** — enables you to generate a market analysis report for the properties within the search area. See *"Running Business & Statistical Reports" on page 193*.
   - **Map Results** — displays the Search Results page as a double-paned window showing a list of matching records on the left, and a corresponding map of the properties on the right. For multiple listings, each push pin is numbered to coincide with the corresponding address in the list. Click the push pin icon to display a detailed Listing Report. See *"Reports" on page 175*.
   - **Download** — exports the search results data for use in another program, such as Excel. See *"Exporting Listings Data" on page 332*.
   - **Save Search** — saves the search criteria for future searches. See *"Saving a Prospect Search" on page 99*.

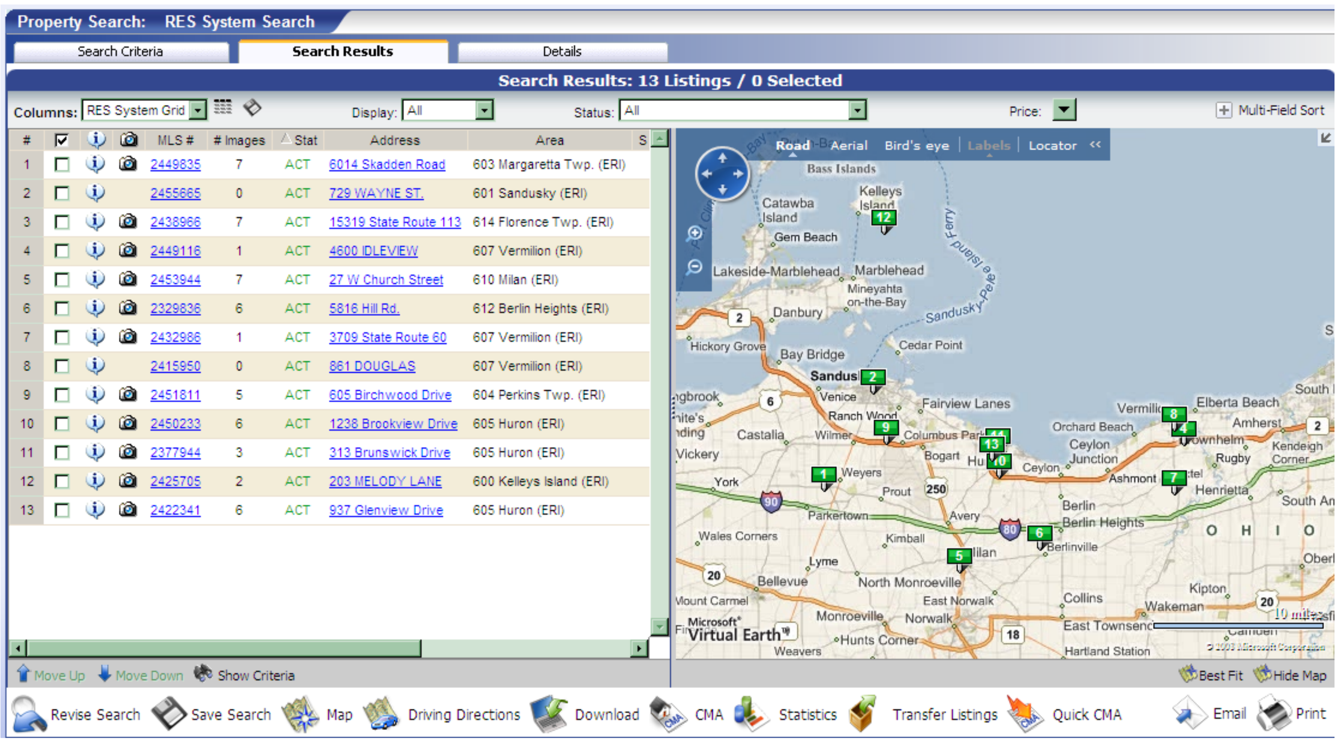
Viewing a Map of Listing Search Results

Listing locations are better imagined by seeing them represented on a map of the area. Use the built-in mapping feature to see different views.

To see a map of the search results:

1. From the Search Results page, click the **Show Map** button on the footer bar.

   A split screen view is displayed.

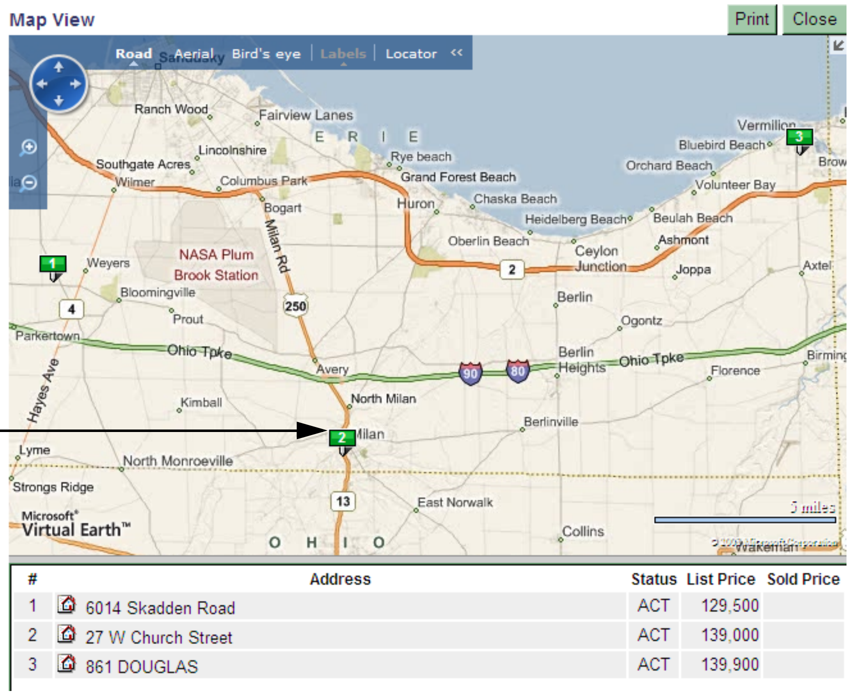


2. Work with the search results from either pane: grid or map.
3. Use the Action buttons to perform more tasks. See *"Working with the Search Results Page" on page 75*.

To see a map of a selected listing:

1. From the Search Results page:
   - point to the Information icon of a single listing to display the Quick Access menu, then select the **Map** icon; or
   - select one or more listings, then click the **Map** action button.

A map of the selected listings opens.



Using the mouse, point to a push pin to view property details.

Each listing is displayed on the map as a push-pin. Each listing's status is indicated by a letter on the head of the push-pin and a specific color. For example, active listings are green and show the letter "A". In addition, for multiple listings, each push pin is numbered to coincide with the corresponding address in the list.

2. Using the mouse, point to a map pin to see more information about the property.
3. Click either the push pin icon on the map; or the house icon in the list to generate a detailed listing report. See *"Reports" on page 175*.
4. Use the map tools to adjust the map view (see *"Using Map Controls and Views" on page 216*).
5. Click **Print**, located in the top right corner of the map, to send the map to the printer. See *"Printing" on page 265*.
6. Click **Close**.

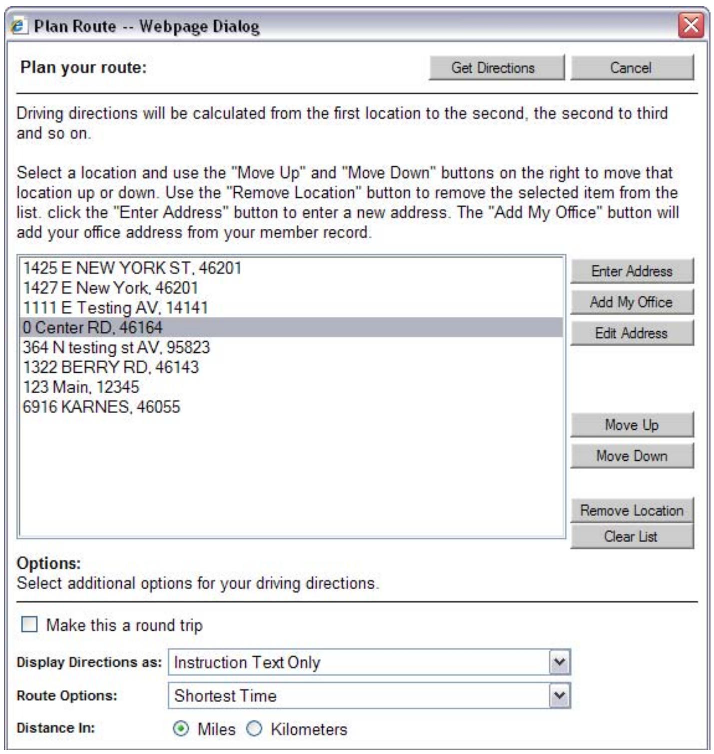
Creating Driving Directions

TEMPO 5 gives you the power to create step-by-step driving directions that will guide you and your clients on a buyer's tour.

To create a set of driving directions:

1. From the Search Results screen, select up to 10 listings that you want to include in the driving directions.
2. Select **Driving Direction** from the Action menu, then click the arrow button.

   The Plan Route dialog box opens.



3. If you want to define a starting point other than the first listing (for example, your office or your client's home), click the **Add My Office** button to enter the address to the list as the starting point.
4. Click the **Enter Address** button to manually add one or more addresses to the list.
5. To arrange multiple listings in the order you plan to see them, highlight a property in the **Locations** list, then click **Move Up** or **Move Down**.
   - click **Remove Location**, to omit a property from the directions.
6. Select the **Make this a round trip** check box, if applicable.
7. Click the **Display Directions as** drop-down list and select a format:

- **Instruction Text Only** — this option creates a report with a single large map and point-to-point instructions.
- **Text w/ Overview Map** — this option provides the same information as **Text Only**, plus individual maps for each segment of the trip.

NOTE! *The **Text w/ Overview Map** option takes longer to generate. If you are somewhat familiar with the area, the **Instruction Text Only** option should be sufficient.*

8. Select the logic you want the program to use when determining the best route from the **Route Options** drop-down list. Choose **Shortest Time**, **Shortest Distance**, etc.
9. Display distances in either **Miles** or **Kilometers**.
10. Click the **Get Directions** button at the top of the dialog box.

    The driving directions are displayed on a map, along with a time and distance estimate, **Reverse Direction**, **E-mail** and **Print** buttons.
11. Confirm that all the properties were located successfully.
    - a list of unmapped properties will appear beneath the main map if there were any problems. If you find any problems or want to make changes, click **Plan Route** to return to the previous screen.

Comparing Route Options

With the map of listings displayed, you can compare different mappings by choosing the fastest or shortest routes, or routes that avoid highways. To quickly generate turn-by-turn driving instructions going the opposite direction, start with the last listing, first.

Web Site Management

IDX Configuration

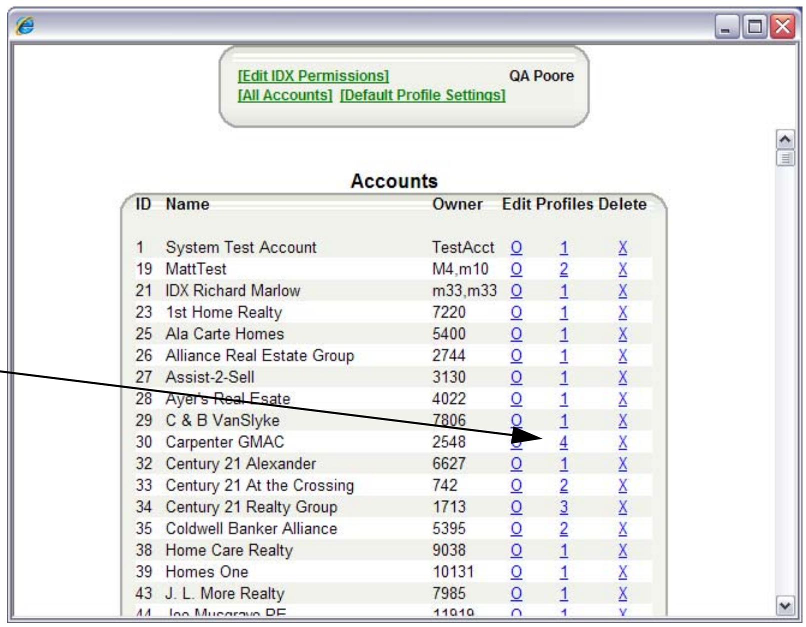
Internet Data Exchange (IDX), sometimes known as Broker Reciprocity, is a way for associations to provide a way for their brokers to acquire and display each other's listings on their public web sites.

To access and configure IDX Permissions:

1. From the main menu, click **My Tools** > **IDX Configuration**.

   A new browser window opens displaying a list of existing accounts and who the respective owners are.

Each account has helpful links that let you view/edit or delete profiles. The number of existing profiles is shown as a number.



2. From the Accounts page, select the following links to perform more tasks:
   - **Edit IDX Permissions** — lets you search the member roster for an MLS member, then view/edit Agent/Broker Information and IDX Permissions. See *"Editing IDX Permissions" on page 229*.
   - **Default Profile Setting** — lets you set up a default profile that can be applied to new accounts. Use it as a template, modifying specific information for each account. See *"Setting Up a Default Profile" on page 231*.
   - **Edit** — each account has a link in this column that lets you modify account information. See *"Working with Accounts" on page 232*.
   - **Profiles** — each account has a link in this column that lets you manage one or more profiles for the selected account, including settings and colors. See *"Working with Profiles" on page 233*.
   - **Delete** — each account has a link in this column that lets you remove an account and its profiles. See *"Working with Accounts" on page 232*.
   - **Add New Account** — lets you add a new account to the list and activate its permissions. See *"Working with Accounts" on page 232*.

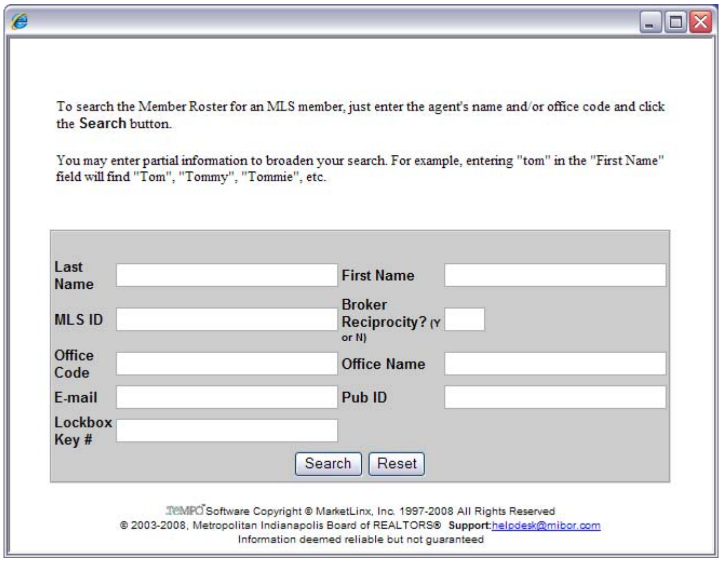
Editing IDX Permissions

Use this tool to search for and change a member's IDX permissions.

To change a member's IDX permissions:

1. From the Accounts page, click the **Edit IDX Permissions** link, located at the top of the page.

   The following page opens.

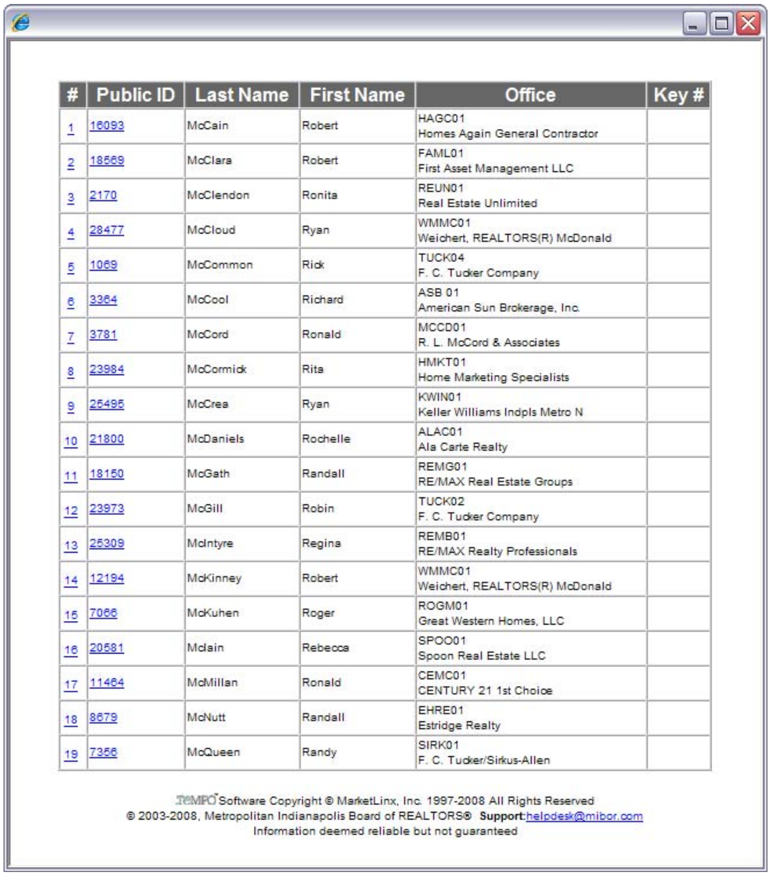


2. Search for an existing member for an MLS by entering:
   - the Agent's First and Last Name, or partial information, in the fields.

   Note: Use the other fields to search by if you know the Office Name, Office Code, Lockbox Key#, etc.

3. Click the **Search** button.

The search results are listed on the following page.



#	Public ID	Last Name	First Name	Office	Key #
1	16093	McCain	Robert	HAGC01 Homes Again General Contractor	
2	18569	McClara	Robert	FAML01 First Asset Management LLC	
3	2170	McClendon	Ronita	REUN01 Real Estate Unlimited	
4	28477	McCloud	Ryan	WMMC01 Weichert, REALTORS(R) McDonald	
5	1069	McCommon	Rick	TUCK04 F. C. Tucker Company	
6	3364	McCool	Richard	ASB 01 American Sun Brokerage, Inc.	
7	3781	McCord	Ronald	MCCD01 R. L. McCord & Associates	
8	23984	McCormick	Rita	HMKT01 Home Marketing Specialists	
9	25495	McCrea	Ryan	KWIN01 Keller Williams Indpls Metro N	
10	21800	McDaniels	Rochelle	ALAC01 Ala Carte Realty	
11	18150	McGath	Randall	REMG01 RE/MAX Real Estate Groups	
12	23973	McGill	Robin	TUCK02 F. C. Tucker Company	
13	25309	McIntyre	Regina	REMB01 RE/MAX Realty Professionals	
14	12194	McKinney	Robert	WMMC01 Weichert, REALTORS(R) McDonald	
15	7066	McKuhen	Roger	ROGM01 Great Western Homes, LLC	
16	20581	Mclain	Rebecca	SPOO01 Spoon Real Estate LLC	
17	11464	McMillan	Ronald	CEMC01 CENTURY 21 1st Choice	
18	8679	McNutt	Randall	EHRE01 Estridge Realty	
19	7356	McQueen	Randy	SIRK01 F. C. Tucker/Sirkus-Allen	

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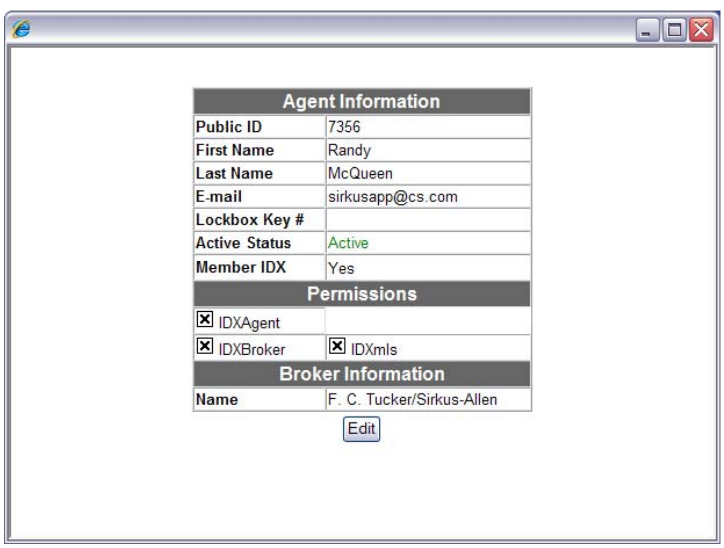
© 2003-2008, Metropolitan Indianapolis Board of REALTORS® Support:helpdesk@mibor.com
Information deemed reliable but not guaranteed

4. Click the **Public ID** link to view the member's existing permissions, along with their Agent/Broker information.



Agent Information	
Public ID	7356
First Name	Randy
Last Name	McQueen
E-mail	sirkusapp@cs.com
Lockbox Key #	
Active Status	Active
Member IDX	Yes
Permissions	
☒ IDXAgent	
☒ IDXBroker	☒ IDXmls
Broker Information	
Name	F. C. Tucker/Sirkus-Allen

Edit

5. Click the **Edit** button to modify these settings.
6. Click the **Update Information** button to save the changes.

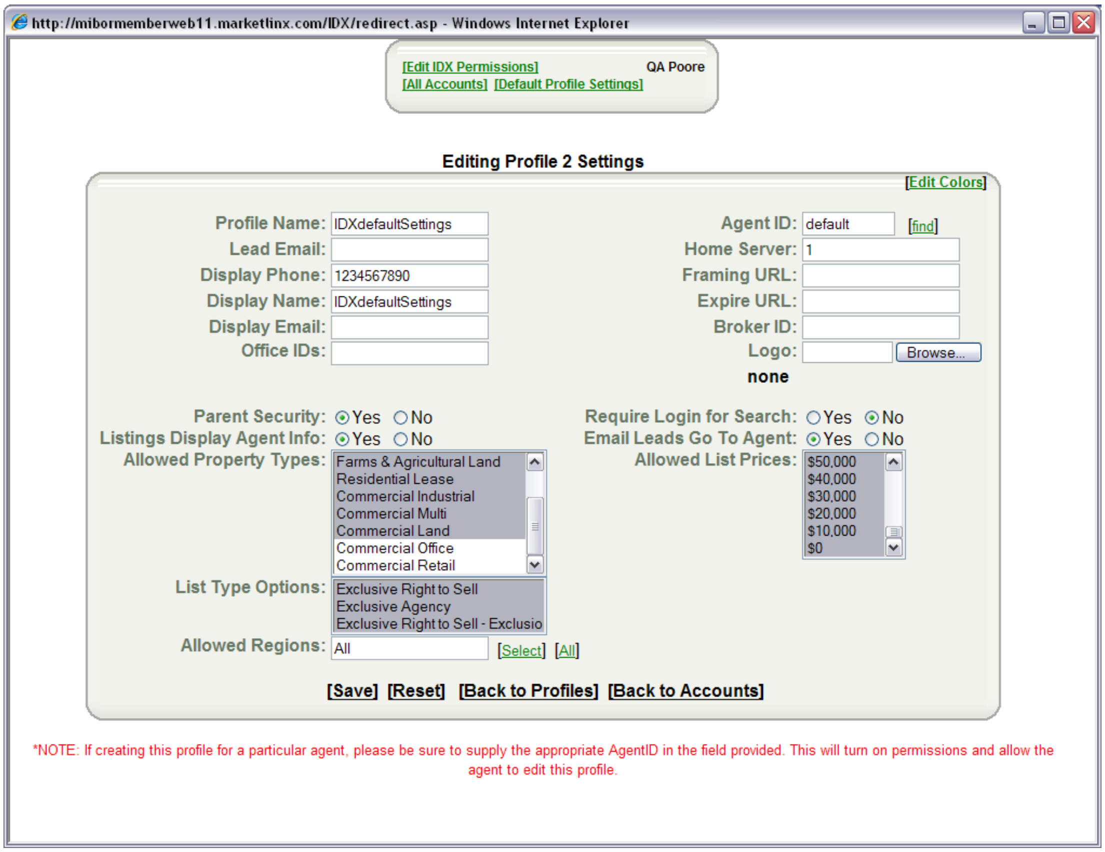
Setting Up a Default Profile

Use this tool to set up a default profile that you can apply to new accounts “as is” or use it as a template that you can easily customize for different accounts.

To set up a default profile:

1. From the Accounts page, click the **Default Profile Settings** link, located at the top of the page.

   The Editing Profile Settings page opens.



2. Set up a generic profile, typing ‘default’ in the **Agent ID** field, etc. See *“Working with Profiles” on page 233*.
3. Click the **Back to Accounts** link to return to the Accounts page.

Working with Accounts

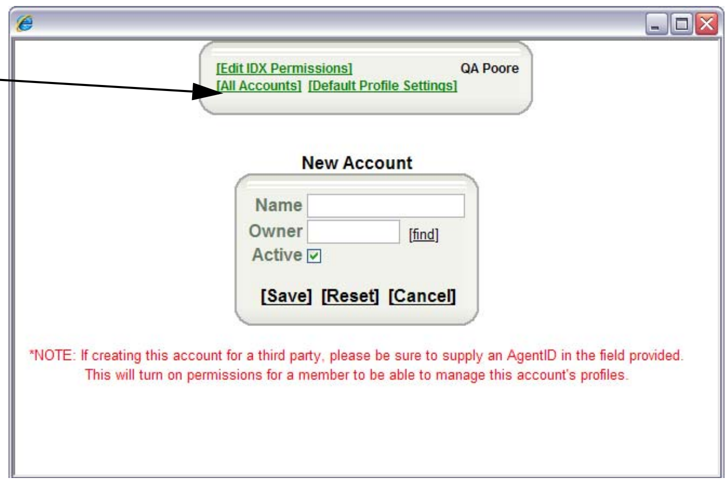
You can easily add new accounts, edit name and owner information, or delete unwanted accounts along with their profiles.

To add a new account:

1. Scroll down to the bottom of the Accounts page, and click **Add New Account**.

   The New Account page opens.

Click the **All Accounts** link to return to the previous page.

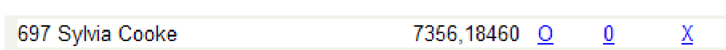


2. Complete the fields:
   - **Name** — type an account name, whether it's a person, association, etc.
   - **Owner** — enter one or more agent Login IDs in this field (separated by commas) to add the members to the account. Click the **find** link to search for an existing member.
3. Select the **Active** check box to enable the account.
4. Click **Save**.

   You are returned to the **Accounts** list where the new account appears at the bottom of the list and is assigned an ID number.

To edit account information:

1. From the Accounts page, locate the account you want to modify, then click the **Edit** link.



   The Editing Account [ID#] page opens.

2. Change the **Name** and **Owner** information; select or clear the **Active** check box.
3. Click **Save**.

   You are returned to the Accounts page.

To delete an account and all of its profiles:

1. From the Accounts page, locate the account you want to delete, then click the **Delete** link.

   A message box appears asking you to confirm the deletion of the account and all of its profiles.
2. Click **OK**.

Working with Profiles

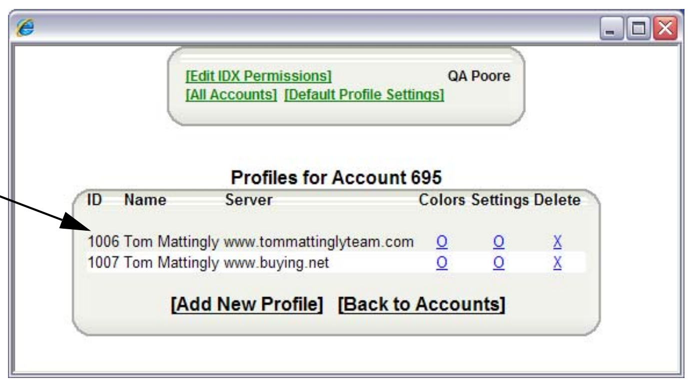
You can choose to apply a default profile to selected accounts, or you can customize one or more profiles for each account. Each account listed on the Accounts page has a link in the **Profiles** column that lets you know how many profiles exist for the account. Click the link to manage the profiles for a selected account.

To view the profiles of an existing account:

1. From the Accounts page, locate an account, then click the link in the **Profiles** column.

   The Profiles for Account [ID#] page opens.

You can see the **ID**, **Name**, and **Server** information for any existing profiles.



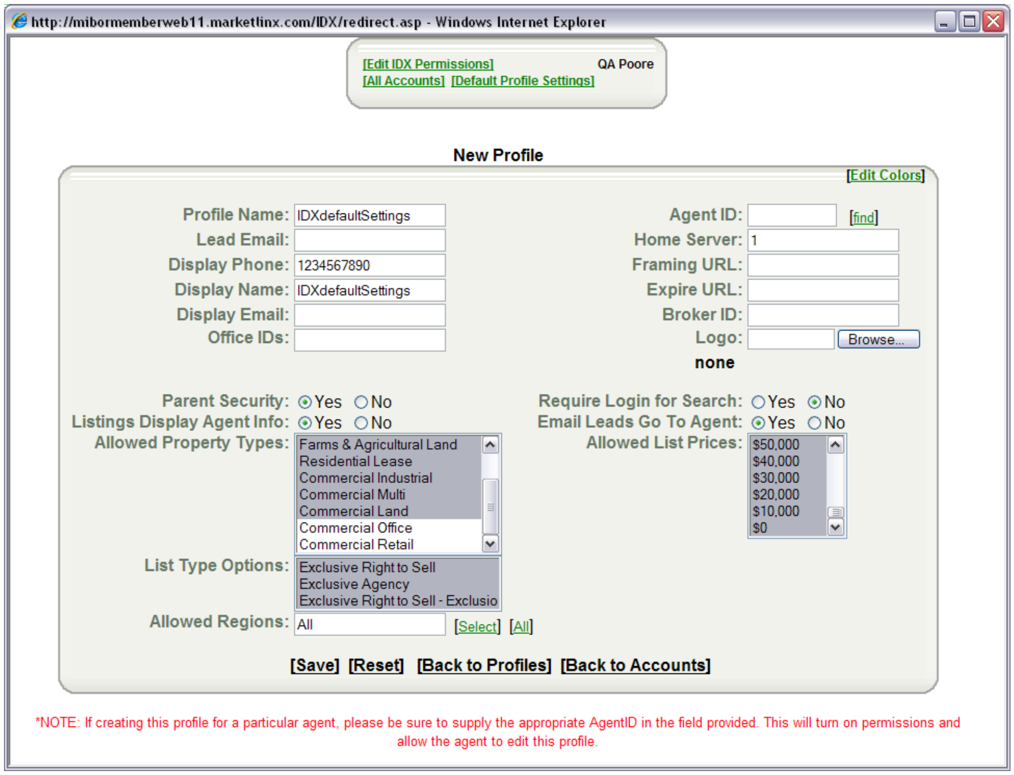
Note: If there are no existing profiles for the account, the text "No Profiles for this Account" is displayed.

2. Locate the profile you want to modify, then click one of the links.
3. Click the **Back to Accounts** link to return to the Accounts page.

To add a new profile:

1. From the Profiles for Account [ID#] page, click the **Add New Profile** link.

The New Profile page opens. The default settings will be loaded which you can change to suit this particular account. See *"Setting Up a Default Profile" on page 231*.



2. Accept and apply the default settings and permissions, or make changes to customize the profile including:
   - **Edit Colors** — choose a color to apply to each of the listed screen elements, from page background color to text and table cell color. See *"Editing Colors" on page 235*.
   - **Agent ID** — click the **find** link to search for a member.
   - **Logo** — click the **Browse** button to search for a saved logo on your computer.
   - **Allowed Property Types** — select one or more from the list.
   - **List Type Options** — select one or more from the list.
   - **Allowed Regions** — click the **Select** link to choose specific regions for the profile, or click the **All** link.
3. Click **Save**.
4. Click the **Edit Settings** link, at the top of the page, to return to the Editing Profile Settings page.

To edit a profile:

1. From the Profiles for Account [ID#] page, locate the profile you want to modify, then click the **Settings** link.

   The Editing Profile Settings page opens.

2. The fields are the same as on the New Profile page. See *"To add a new profile:" on page 233*.

To delete a profile:

1. From the Profiles for Account [ID#] page, locate the profile you want to delete in the list, then click the **Delete** link.

   A message box appears asking you to confirm the deletion of the profile.
2. Click **OK**.

Editing Colors

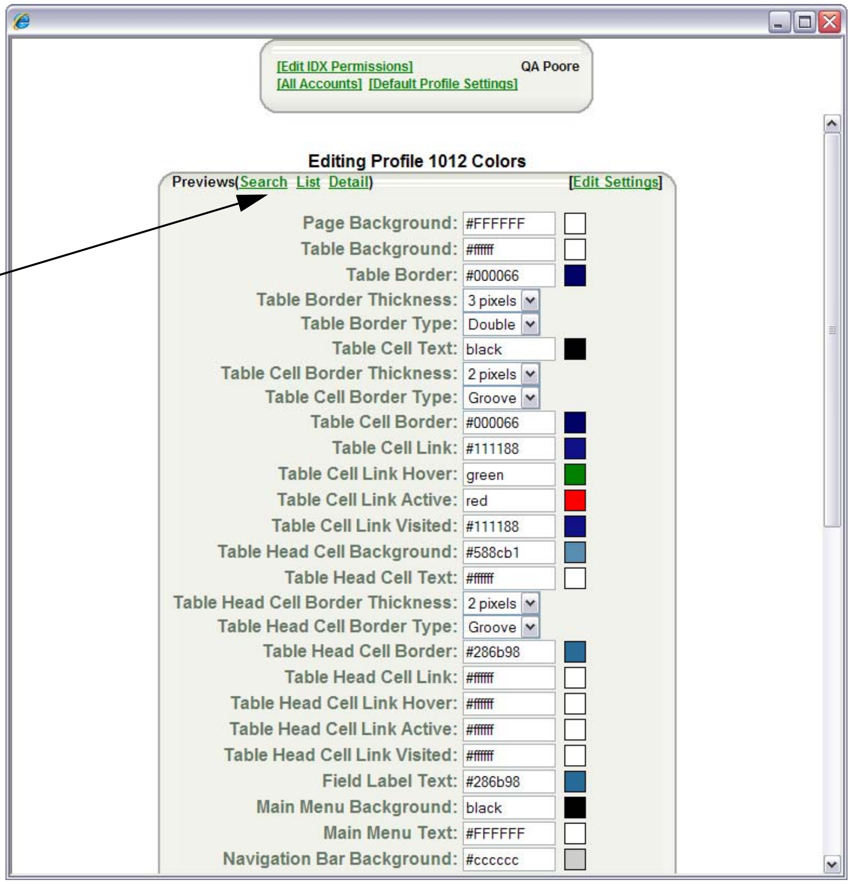
Use the Editing Profile Colors page to preview the appearance of the Search, List and Detail pages with different colors.

To edit a profile's colors:

1. Locate the profile you want to customize, then click the **Colors** link.

   The Editing Profile [#] Colors page opens.

Click here to view page previews.



2. Use the controls to do the following:
   - click on the color swatches to display a palette, from which you can choose a different color.

- click the drop-down lists to select an option, for example the **Table Cell Border Type** appearance can be **Solid**, **Double** or **Groove**.

3. To see what your color choices will look like, click one of the **Preview** links: Search, **List**, or **Detail**.

   The corresponding page appears in a new browser window.

4. Close the browser window to return to the Editing Profile Colors page.
5. Click **Save** to keep your changes.
6. Click the **Back to Accounts** link.

Using the Website Manager

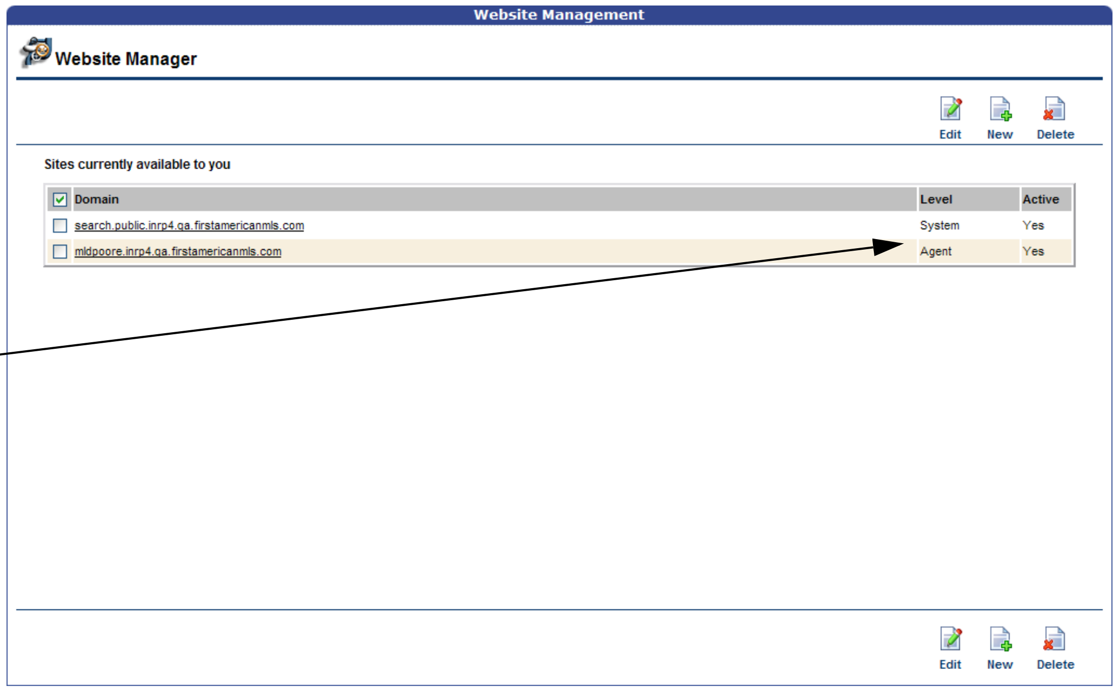
The Website Manager page lists the site currently available to you. Configure new or existing sites, or delete unwanted sites from the list.

To access the Website Manager:

1. From the main menu, click **My Tools** > **Preferences** > **Website Management**.

   The Website Manager page opens with a list of available sites.

Look in the **Level** column to see if the site is **System** level or **Agent** level.



2. From this page, do the following:
   - click the **Domain** link; or select the adjacent check box, then click **Edit** to display the [System/Agent] Website Configuration page for the selected site. Follow the instructions for configuring a new website. See *"Creating a New Website" on page 238*.
   - select the check box next to one or more unwanted websites in the list, then click **Delete**. When the message box appears prompting you to confirm the deletion, click **OK**.
   - click the **New** button to add a new website domain to the list. See *"Creating a New Website" on page 238*.
3. Click **Close**.

Creating a New Website

TEMPO 5 enables you to easily set up and manage the appearance and content of Agent and Broker websites using the built-in features and controls.

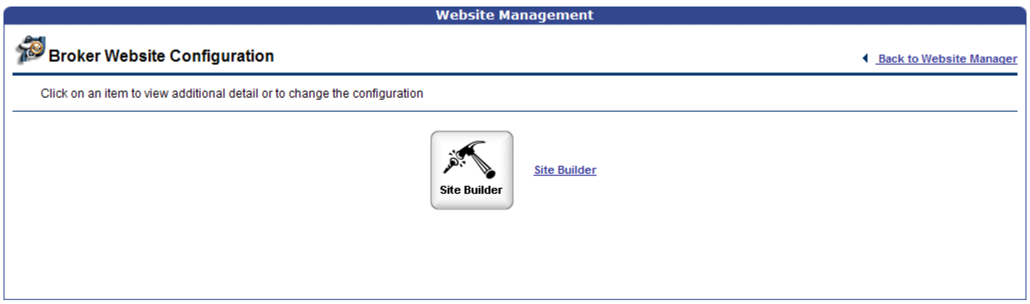
To add a new website:

1. From the Website Manager page, click the **New** button.

   The Create New Website dialog box opens.

2. From the **Select a new Website to create** drop-down list, choose a type, for example **Agent** or **Broker**, then click **OK**.

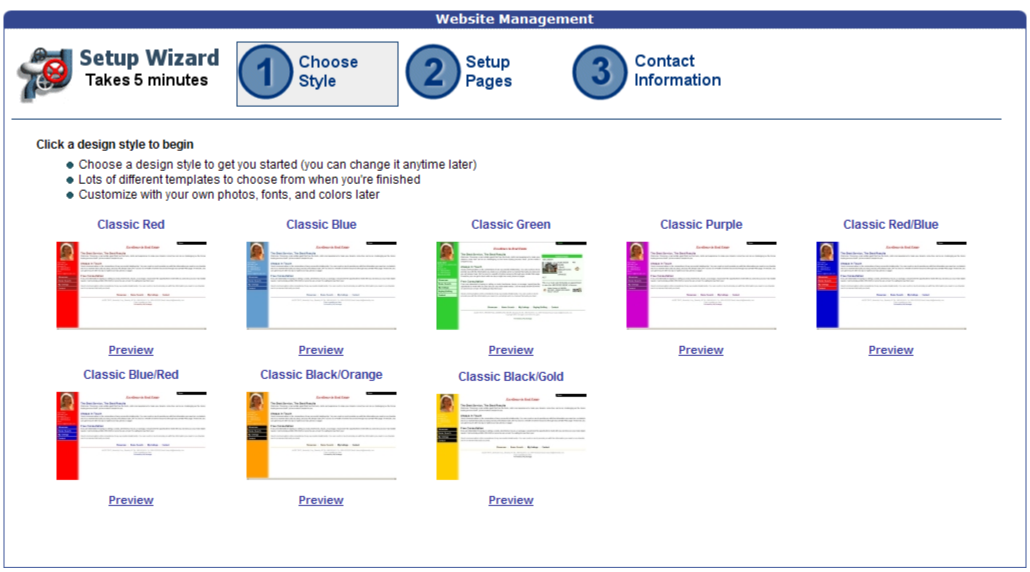
   The Website Configuration page opens.



3. Click the **Site Builder** button (or link).

   The first page of the Setup Wizard opens.

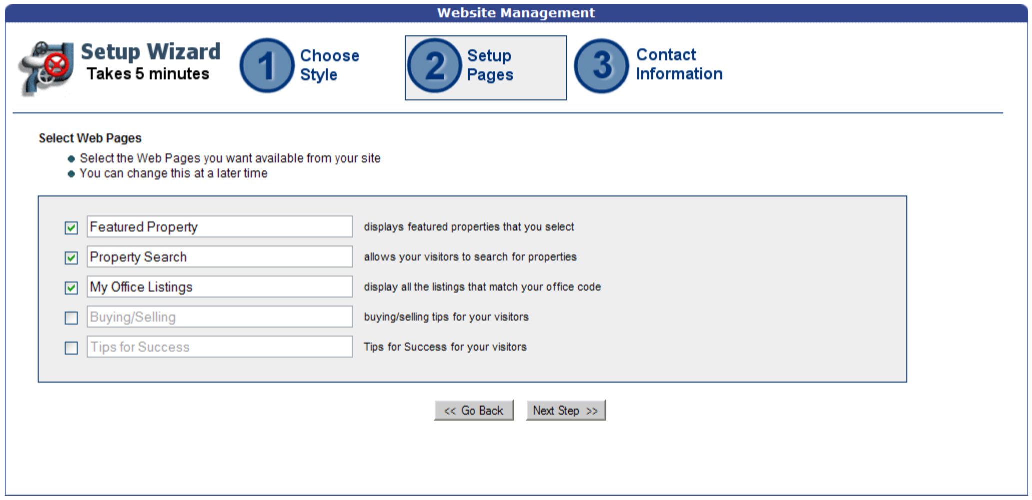
Click the **Preview** links to see a larger view of the templates.



4. Click on one of the available design templates.

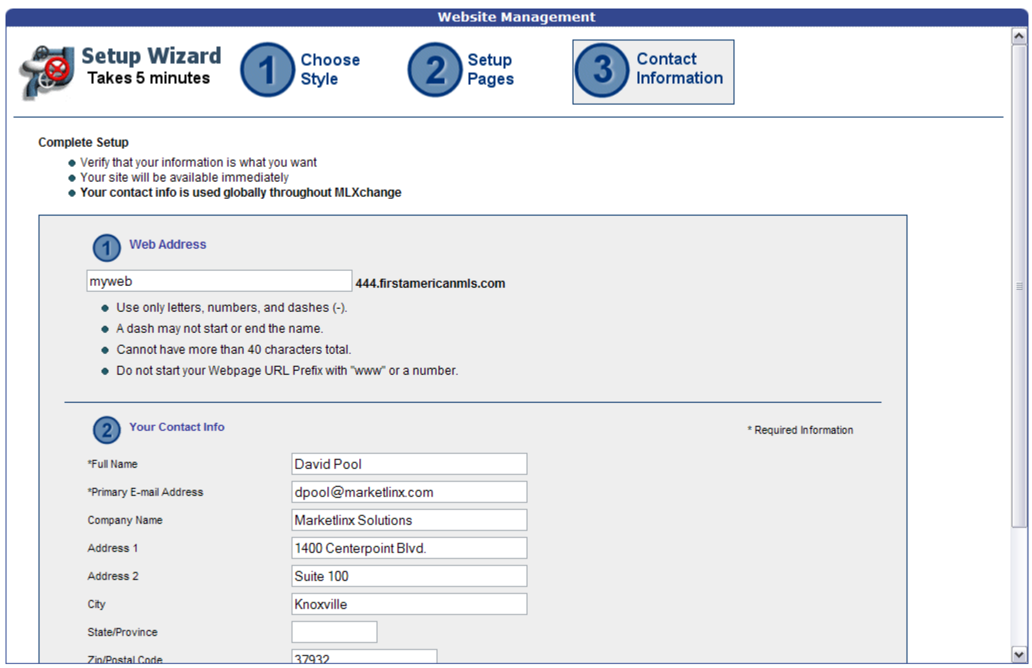
   Note: You can change the fonts, colors, photos later.

A frame highlights your selection, and when you click, the second page opens.



5. Select one or more of the check boxes indicating which web pages you want to add to the site, then click **Next Step**.

   The third page of the wizard opens.

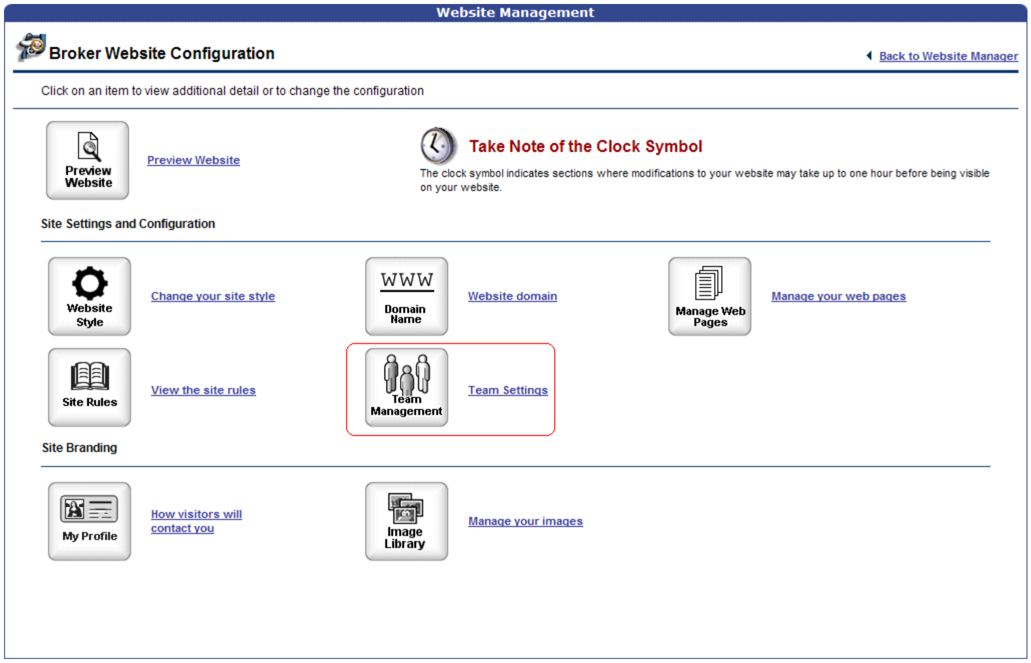


6. Enter as much contact information as you can.

   Note: Fields marked with an asterisk (*) are required.

7. Click the **Build Site** button.

The [Agent/Broker] Website Configuration page opens.



8. Click on a button to set up the area. See *"Configuring an Agent or Broker Website" on page 241*.

Configuring an Agent or Broker Website

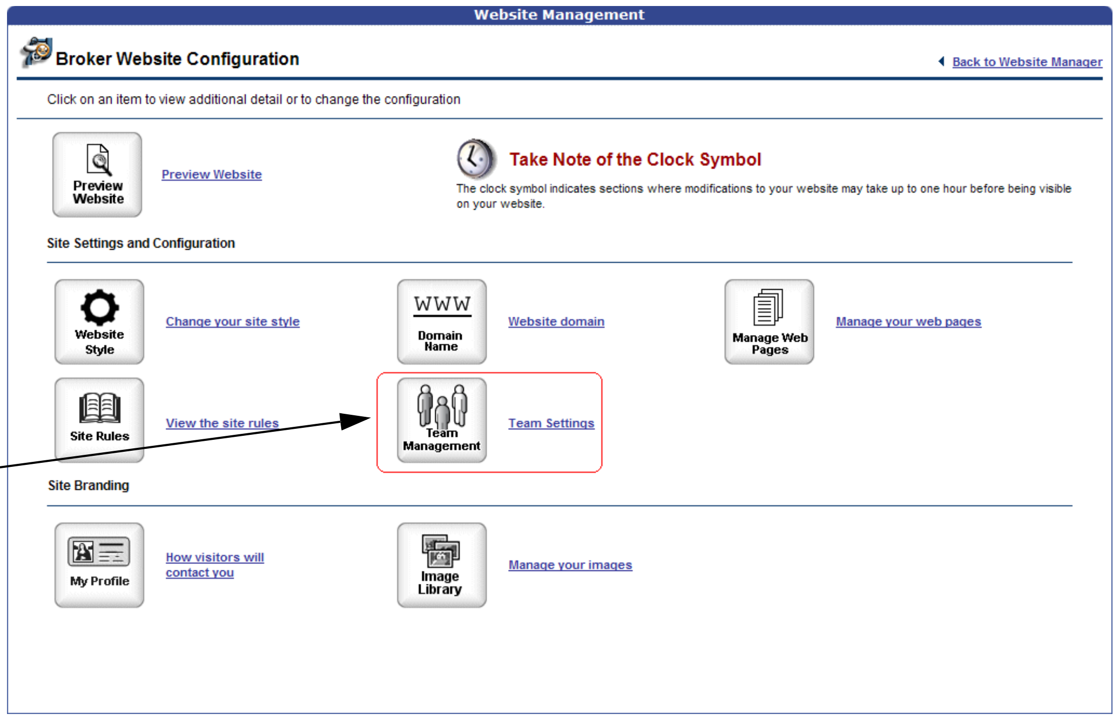
TEMPO 5 enables you to easily set up and manage the appearance and content of your Web site using the built-in features and controls.

NOTE! *The Agent Website Configuration page has an additional Team Settings section, not found on the System Website Configuration page.*

To configure a Website:

1. From the Website Configuration page, click on the icons to view additional detail or to change the site's configuration.

Team Settings is <u>only found</u> on the Agent website Configuration page.



NOTE! *The clock icon appears adjacent to some sections, indicating that any changes made there may take up to one hour before taking effect.*

2. From this page, click on the following icons to customize your TEMPO 5 Website:
   - **Preview Website** — See *"Previewing Your Website" on page 242*.
   - **Website Style** — See *"Changing Your Site Style" on page 242*.
   - **Site Rules** — See *"Viewing the Site Rules" on page 243*.
   - **Website Domain** — See *"Website Domain Setup" on page 244*.
   - **Team Management** — This option is only available on an Agent Website Configuration page. See *"Team Settings for Agents" on page 246*.
   - **Manage Web Pages** — See *"Managing Your Web Pages" on page 247*.
   - **My Profile** — See *"How Prospects Contact You" on page 254*.
   - **Image Library** — See *"Managing Website Images" on page 255*.

3. Click the **Back to Website Manager** link in the top right corner to return to the previous page.

Previewing Your Website

To view your Agent or Broker Website as your clients would see it, and to see how new changes affect its appearance, you can preview your Web site at any time. This is particularly useful when you are updating the site.

NOTE! *A **Preview** button is located in the top and bottom corners of every page.*

To preview your Agent Web Site:

- From the Website Configuration page, simply click the **Preview Website** button.

  The website opens in a new browser window.

Changing Your Site Style

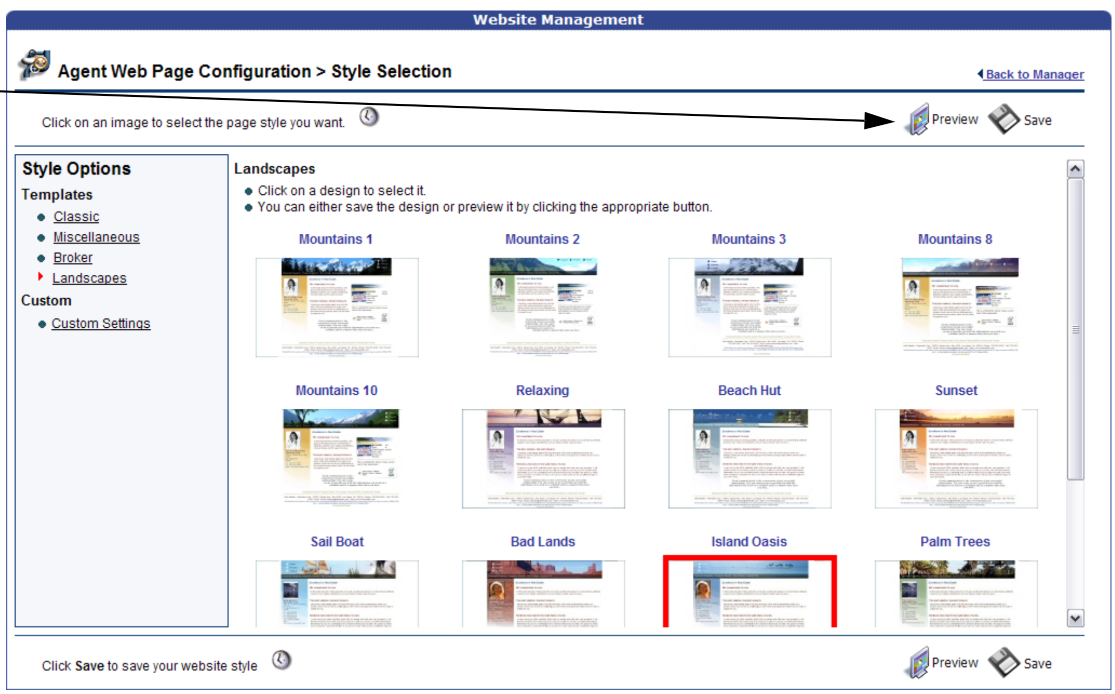
TEMPO 5 provides several attractive Web site templates to choose from. Keep your site looking fresh by changing the theme every once in awhile.

To change your site style:

1. From the Website Configuration page, click the **Website Style** button.

   The Style Selection page opens.

Click **Preview** to view a selected template before you save it.



2. To browse a style category, click the category name in the **Templates** list on the left side of the page.

The available templates appear on the right.

3. Click on a template to select it.

   A colored frame outlines a selected template.

4. Click the **Preview** button to view the template before you save it.
5. Click the **Custom Settings** link on the left side of the page to specify basic color selections for certain components, such as **Main Text Color**, **Heading Color**, etc.
6. If you're happy with the look of the selected template, click **Save**.

   Note: This section has the clock icon in the top right corner, meaning that it may take up to one hour for your site style to take effect.

   A message dialog box appears to confirm that your changes have been saved.

7. Click **OK**.

   You are returned to the Website Configuration page.

8. Click **Preview Website** to view your updated site.

Viewing the Site Rules

TEMPO 5 automatically follows your MLS Board's rules and regulations regarding the display of online listing information. For example, regarding property searching on your site, the **Property Search** button may or may not be available.

To view the site rules:

1. From the Website Configuration page, click **Site Rules** button.

   The Site Rules page opens.

2. Read the information in the **Rules set by your MLS** section at the top of the page.
3. In the **Settings that you can override** section near the bottom of the page, select one or more of the check boxes to enable the site rules that you are allowed to override. For example, **Show Property Address**, or **Show other agents' Virtual Tours**.
4. You can change the **Send External Leads to** e-mail address by clicking the **Change** button.
5. Choose an option for the **Send Internal Leads to** section.
6. Click the drop-down lists and select one or more items for each of the property types.
7. Click **Save**.

   A message dialog box appears to confirm that your new site rules settings have been saved.

8. Click **OK**.

9. Click **Close**.

   You are returned to the Website Configuration page.

Website Domain Setup

The URL for your Agent Web Site is comprised of a secondary domain that prefixes your Board's primary TEMPO 5 domain. For example, if the Web address (URL) for your Board's TEMPO 5 domain is "http://mls.tempo.com," then the address for your Agent Web Site will look like this: "http://StaceyJones.mls.tempo.com."

NOTE! *To help drive traffic to your site, it is a good idea to include your site's URL on all business communications, including yard signs, flyers, ads, business cards, and e-mails. It is important to make sure you choose a URL that you are happy with because if you change your URL after using it for a period of time, people will be unable to find your site and any links to your site will be broken.*

To activate your Website:

1. From the Website Configuration page, click the **Website domain** button.

   The Domain Setup page opens.

2. Read the **Rules** before you choose your Web page URL prefix. For example, you cannot exceed 40 characters in total.
3. In the **Web page URL Prefix** text box, enter the personal portion of the URL. For example type your name, or something distinctive and easy to remember: http://stacey.mls.tempo.com
4. Take note of the following lead management information:
   - **IDX SearchLink** — place this link on any web site to make that site capable of accessing your IDX search screen. See *"Using the IDX Search Link" on page 245*See: *"Using the IDX Search Link"*.
   - **"Contact Me" Web Inquiry Form link** — use this link on other web sites instead of an e-mail link, to funnel leads to the TEMPO 5 lead management tools. See *"Using the "Contact Me" Link" on page 246*See: *"Using the "Contact Me" Link"*.
5. Click **Advanced Options** to expand the section and access features that will make it easier for Internet search engines to find your site and/or to redirect traffic from an existing site to your TEMPO 5 Agent Web site.
6. Under **Search engine tools**, enter the following:
   - **Website Title** — enter your chosen title, which will appear on the title bar, up to 64 characters or less.
   - **Description** — enter a description of your website in 25 words or less.
   - **Keywords** — the words you enter here will be used as meta tags within the HTML code of your website.

7. If you currently have an existing website and you want to automatically redirect traffic from it to your TEMPO 5 Agent website, enter the URL in the field provided.

NOTE! *You must also ask your domain registrar to redirect visitors from your domain to your TEMPO 5 Agent website. (Your domain registrar is the company that sold you your domain name.) If you administrate your own domain, you can set up the redirection yourself using one of three methods. See* *"About Self-Administrated Web Domains" on page 245*.

8. Click **Add Site**.

   The URL appears under **Existing sites that are being redirected**.

   - Click **delete this site** to remove the redirected site's URL.

9. When you have finishing entering your domain information, click **Save**.

   You now have a Web site!

Using the IDX Search Link

NOTE! *If available, the IDX Search Link feature may require an additional monthly or annual fee. Contact your MLS to check for availability.*

If your Board has enabled this option for TEMPO 5 users, you or your Webmaster can easily add a listing search to any Web site (not just your TEMPO 5 Agent Web Site) that will automatically direct leads to your TEMPO 5 inbox.

If you know a little HTML, you can add the IDX search to a Web site by using the IDX SearchLink URL provided by TEMPO 5. For example:

```
<a href="http://search.yourname.mls.tempo.com">
Click here to Search the MLS!
</a>
```

Anyone who clicks the link will see the full IDX search interface, and if they ask for more information, the request will end up in TEMPO 5 as a new lead.

About Self-Administrated Web Domains

If you administrate your own Web domain, you can set up the redirection to the TEMPO 5 site yourself, using one of the following methods:

- The preferred method is to add a CNAME record to your zone file that points to your subdomain (e.g., "www.realtysuperstar.com") to the TEMPO 5 Web Site "mls.tempo.com." Do NOT point to your secondary domain (e.g., "alanthompson.mls.tempo.com"). This option can usually be found under advanced domain settings. Please contact your registrar if you cannot locate this option.

- If the above preferred method is not available to you, then you should be able to simply forward your own domain to your Agent Web Site at “alanthompson.mls.tempo.com” (for example). The disadvantage of this method is that “alanthompson.demo.tempo.com” will appear in the browser address bar, not your own domain name.
- Some domain registrars offer the option to “frame” your domain forwarding so your domain name (e.g., “www.realtysuperstar.com”) will appear in the browser address bar. In other respects, this option is essentially the same as option 2. This is not a desirable method, however, because it prevents site visitors from book marking specific pages within your site.

Using the “Contact Me” Link

The “Contact Me!” link is designed to replace your e-mail links on any other Web sites that you may have in order to capture new leads.

The difference between the “Contact Me!” link and an ordinary e-mail link is that every e-mail sent via the “Contact Me!” link will be funneled directly into your TEMPO 5 inbox and result in the automatic creation of a new client record.

Your personal “Contact Me!” link can be added to any Web page using very simple HTML like this:

```
<a href="http://lead.yourname.mls.tempo.com">
Click here to send me an E-mail!
</a>
```

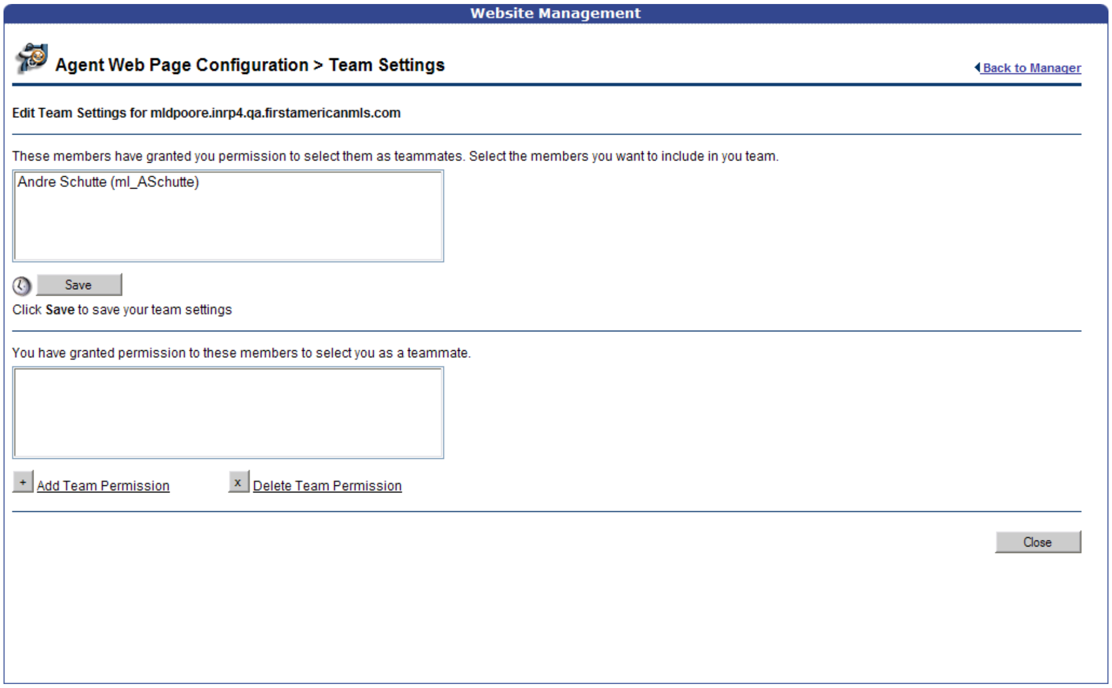
Team Settings for Agents

You can identify up to four members in the office to be your team members. All listings for which any of the team members are the listing agent, will be included on the My Listings page.

To select team members:

1. From the Website Configuration page, click the Team Management button.

The Team Settings page opens.



Your office members must first give their permission to be selected as teammates. Those who have granted you permission, are listed in the top list box.

2. To grant permission to other members in your office to add you as a teammate, click the **Add Team Permission** link.

   The Member Lookup dialog box opens.

3. Enter the Agent's First or Last Name (in total or in part) in the text boxes, then click the **Find** button.

4. Highlight the member from the search results in the list, then click **OK**.

   The name appears in the bottom list box.

5. To remove permission from an Agent to use you as a teammate, highlight the Agent name in the bottom list, then click the **Delete Team Permission** link.

6. Click **Close**.

Managing Your Web Pages

Your Agent Website consists of a number of pages that can be renamed, displayed, hidden, and individually customized to your liking. Each page has several sub-sections, that can also be edited and displayed.

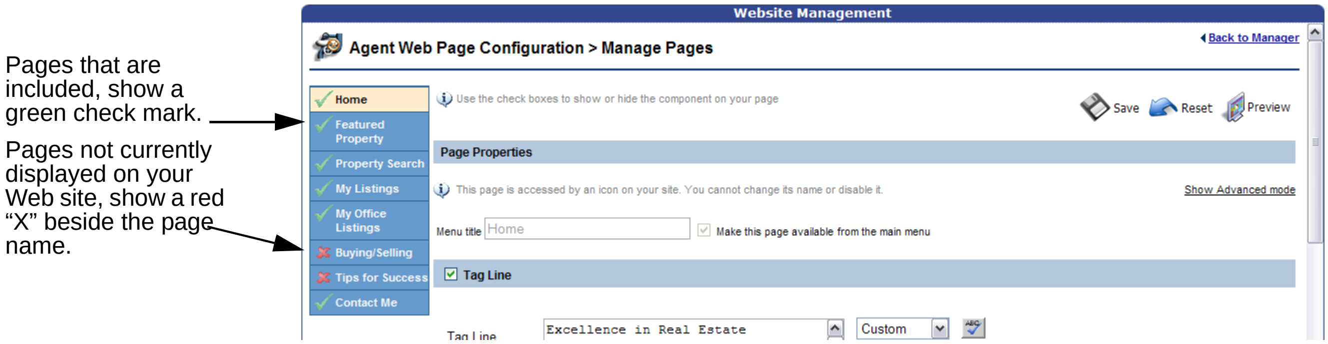
There are two mode for editing the Home page: Easy mode and Advanced mode. Until you choose otherwise, you are working in Easy mode. See *"Using Advanced Editing Mode" on page 250*.

To use the Agent web page manager:

1. From the Website Configuration page, click the **Manage Web Pages** button.

   The Manage Pages page opens. By default, the Home page is displayed.

2. Click on a page name in the navigation menu, located in the upper left corner, to display the web page you want to edit.



NOTE! *Since each page title is completely customizable, the page titles listed in the navigation menu can change accordingly. Only the Home page remains unchanged.*

3. When you make changes to the pages, click:
   - **Save** — to save the settings.
   - **Preview** — view the changes as they will look on the web site.

NOTE! *Every page has a **Page Properties** and **Tag Line** section. The remaining sections differ for each page and will be described separately.*

Customizing the Home Page

Editing the Home page is slightly different than editing the rest of the pages. Since it is accessed by an icon embedded on your Web site, certain elements cannot be changed. For instance, you can never rename the Home page or disable it. For that reason, the **Page Properties** section of the Home page is NOT available to you.

Showing a Feature Property

You can display one or more featured properties on your website, along with a personalized sales pitch, to entice interested buyers.

To show a featured property on the Home page:

1. Select the **Feature this property** check box in the section header.
2. Click one of these options:
   - **ML Number** — enter a single listing's ML number in the text box.
   - **Cycle through Featured Properties** — enter an ML number for multiple listings in the text box; one per row.

   Note: The MLS numbers must be actively on the market in order to be displayed on your Agent website. If an ML number is not valid, or the *property comes off the market, the property will no longer be displayed on your site.*

The featured listing will be displayed on your website. For multiple listings, a random shuffle of the featured properties list will occur each time the Home page loads.

3. To add your personal **Sales pitch** text beneath the featured property, type it in the text box.
   - click the **Spell Check** icon to check for possible errors.
4. Click **Save**.

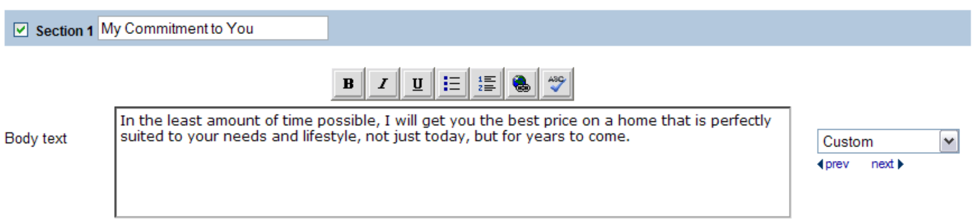
Customizable Sections on the Home Page

The bottom part of the Home page consists of a number of unnamed sections reserved for entering free-form text. You can enter your own text or choose from the lists of pre-written content, letting TEMPO 5 take care of the formatting for you.

To display a customized section on your Web site:

1. Select the **Section [#]** check box in the section header.

   This ensures the content will be displayed on the Home page.



2. Type a section sub-heading in the text box.
3. Enter your own **Body text**; or choose a pre-written paragraph from the drop-down list to the right.
   - click **< Prev** and **Next >** to browse through the list of pre-written content.
4. To apply formatting to the free-form text, such as bolding, italics, etc., use the cursor to highlight a section of text, then click the appropriate formatting tool bar button above the text box.
   - To undo the applied formatting, click the button again.
5. Click **Save**.

Adding a Call-out

A call-out is a short paragraph that appears in a slightly different style or format from the rest of the body text in order to draw the reader's attention to it. The call-out may be a favorite quote, your business philosophy, etc.

To add a custom Call-out to the Home page:

1. Select the **Call-out** check box in the section header.

This ensures the content will be displayed on the Home page.

2. Type a section sub-heading in the text box.
3. Enter your own **Body text**; or choose a pre-written paragraph from the drop-down list to the right.
   - click **< Prev** and **Next >** to browse through the list of pre-written content.
   - click the **Spell Check** icon to check for possible errors.
4. Click **Save**.

Using Advanced Editing Mode

When formatting sections of the Home page, you can use a more sophisticated formatting tool, called the Advanced Home Page Editor, to achieve a completely customized look. Similar to a true word processor, this feature lets you control the formatting. For even greater control, you can even edit the Home page's HTML code.

NOTE! *It is assumed you are familiar with the use of formatting styles using a word processor like Microsoft Word. Therefore, this section will not go into detail.*

To use the Advanced Home page editor:

1. In the right corner of the **Page Properties** section of the Home page, click the **Show Advanced mode** link.

   The Website Manager reloads to show the page in Advanced editing mode.
2. To create or edit the page, click the **Design** button at the bottom of the text frame (by default it should already be selected).
3. Use the **Editor Features** menu to insert new items, such as tables, images, URL links and lines; and to define formatting attributes for selected text. The toolbar above the text box frame performs the same function.

   For example, click the **Paragraph Style** icon to specify alignment, color and text display attributes from the **Paragraph Style Selection** dialog.
   - click the **Features** button to return to the **Editor Features** main menu.
4. Click the toolbar icons above and below the body text frame to apply formatting styles to selected text, cut, copy, paste, etc.
5. Click **HTML** at the bottom of the body text frame to edit the Home page's HTML code directly.
   - click **Preview** to view the results.
   - click **Design** to return to the original body text view.
6. Click **Save**.
7. Click **Use Easy mode** to return to the original view of Home page.
8. Click **Save**.

Customizing the Featured Property Page

NOTE! *Pages that are not currently included on your Web site, show a red "X" beside the page name in the navigation menu.*

Use the Featured Property page to feature current listings and recently sold properties on your Web page, with relevant tag lines.

Changing Page Properties

The **Page Properties** section lets you change a selected page's menu title and specify whether it can be accessed from the Home page or not.

NOTE! *You have NO access to the Page Properties section for the Home page. The menu title and its availability from the main menu are permanently defined.*

To change the page properties:

1. From the **Page Properties** section of the selected page:
   - type a new name in the **Menu title** text box.
   - select the **Make this page available from the main menu** check box to display this page on the main menu of the web site's Home page; or clear the check box to hide the page entirely.

   Note: If the selected page is NOT being displayed on the Home page, the navigation list displays a red " " next to the page's name. If the selected page IS available from the Home page, the navigation list displays a green " " next to the page's name.
2. Click **Save**.
3. Click **Preview** to review these changes.

Displaying Tag Lines

Customize each page by adding a "catch-phrase" at the top of the page, called the Tag Line, or hide it altogether. An example is "Excellence in Real Estate". You can choose what the tag line says and whether or not to display it.

To specify a tag line to display on a selected page:

1. Select the **Tag Line** check box in the section header.

   The other options are enabled.
2. Use the drop-down list to select the name of a pre-defined tag line, such as **Excellence**; or click the **< prev** or **next >** links to scroll through the available tag titles, when you have several.
3. Create your own **Tag Line** by typing in the text box.
   - Click the **Spell Check** icon to check for possible errors.
4. Click **Save**.

Title for On Market and Off Market Featured Properties

Add a section title to accompany the featured listings and recently sold properties on your Web site. For example, you may entitle the active listings “For Sale” and the properties with a Sold status, “Recently Sold”.

To add featured listings and sales currently available:

1. Select the **Title for [On-Market/Off-Market] Featured Properties** check box in the section header to display this section on the Featured Property page.
2. Type a section title in the text box.
3. In the **Title for On-Market** section, add the ML numbers of the active listings you want to feature in the list: (one number per row).
   - if there are no featured listings currently available, enter some explanatory text in the **No properties found** text box.
4. In the **Title for Off-Market** section, add the ML numbers of the sold properties you want to feature in the list: (one number per row).
   - if there are no featured sales currently available, enter some explanatory text in the **No properties found** text box.
5. Click **Save**.

Customizing the Property Search Page

NOTE! *Pages that are not currently included on your Web site, show a red “X” beside the page name in the navigation menu.*

You can display several types of search templates on the Property Search page of your Web site. Each search link lets a client search for a specific property type, revising the criteria if necessary, to find meaningful results. Also, they can be tagged to show on the Home page.

To customize the Property Search page:

1. From the **Page Properties** section change the name of the page, or hide this page from being displayed on your website.
2. In the **Tag Line** section, change the title at the top of the page, or hide this page. See *“Customizing the Featured Property Page” on page 251*.
3. In the **Property Search** section, select the check box in the header to display this section on the Property Search page.

NOTE! *The search types featured on this page are determined by your MLS Board.*

4. Click **Save**.

Customizing the Listings Pages

NOTE! *Pages that are not currently included on your Web site, show a red “X” beside the page name in the navigation menu.*

The My Listings page lets you display the on-market listings that belong to you; and the Office Listings page lets you display the properties that have been listed with your office.

To customize the Listings pages:

1. From the **Page Properties** section, change the name of the page or hide this page from being displayed on your website. See *"Configuring an Agent or Broker Website" on page 241*.
2. In the **Tag Line** section, change the title at the top of the page, or hide this page. See *"Customizing the Featured Property Page" on page 251*.
3. In the **My Listings** or **My Office Listings** section, select the check box in the header to display the section on the My Listings and My Office Listings pages.
4. Add the ML numbers of the sales you want to feature in the list (one number per row).
   - if there are no featured sales currently available, enter some explanatory text in the **No properties found** text box.
5. Click **Save**.

Customizing the Buying/Selling Page

The bottom part of the Buying/Selling page consists of a number of unnamed sections reserved for entering free-form text. You can enter your own text or choose from the lists of pre-written content, letting TEMPO 5 take care of the formatting for you.

Perhaps you might want to offer hints about buying or selling, or why a client should use a Realtor®, etc.

To customize the Buying/Selling page:

1. From the **Page Properties** section, change the name of the page or hide this page from being displayed on your website. See *"Configuring an Agent or Broker Website" on page 241*.
2. In the **Tag Line** section, change the title at the top of the page, or hide this page. See *"Customizing the Featured Property Page" on page 251*.
3. Select the **Section [#]** check box in the section header.

   This ensures the content will be displayed on the Buying/Selling page.
4. Type a section sub-heading in the text box and enter your own body text; or choose a pre-written paragraph from the drop-down list to the right of the text box.
   - click **< Prev** and **Next >** to browse through the list of pre-written content.
5. To apply formatting to the free-form text, such as bolding, italics, etc., use the cursor to highlight a section of text, then click the appropriate formatting toolbar button above the field.

- To undo the applied formatting, click the button again.

6. Click **Save**.

Setting Up the 'Contact Me' Form

The Contact Form is a page that facilitates your clients getting in touch with you. They complete the form with their contact information and property details. A click of the **Send E-mail** button sends the information directly to you. While you cannot edit the form, you can add a subtitle and introductory paragraph.

To set up the Contact form:

NOTE! *Pages that are not currently included on your Web site, show a red "X" beside the page name in the navigation menu.*

1. From the **Page Properties** section, change the name of the page or hide this page from being displayed on your website. See *"Configuring an Agent or Broker Website" on page 241*.
2. In the **Tag Line** section, change the title at the top of the page, or hide this page. See *"Customizing the Featured Property Page" on page 251*.
3. In the **Contact Form** section, select the check box in the header to display this section on the Contact Me page.
4. In the **Body text** box, add an introductory paragraph.
5. Click **Save**.

How Prospects Contact You

TEMPO 5 makes it easy to add your contact information, such as an e-mail signature, to your Website profile. Specify an alternate "Reply To" e-mail address and set up your e-mail enabled cell phone or pager to receive new prospect matches.

To change your contact information:

1. From the Website Configuration page, click the **My Profile** button.

   The My Profile page opens.
2. Make the necessary changes or additions to your contact information:
   - Primary e-mail address
   - Pager/Cell e-mail
   - Reply to e-mail address
   - E-mail signature
   - Name, Address and Company information
   - Primary, cell phone, 1-800, fax, numbers, web URL and Pager and PIN numbers

3. Make sure the information is complete and accurate.
4. Click **Save**.

   A message dialog confirms that the changes have been saved.

   Click **OK**.

Managing Website Images

Use the My Image Library page to add a personal image or company logo to your website.

NOTE! *Most styles of website look best using the Agent Photo and/or Office Photo.*

To add images to your website:

1. From the Website Configuration page, click the **Image Library** button.

   The My Image Library page opens.
2. Click the **Headshot** and **Company Logo** drop-down lists and choose appropriate images to use.
3. Click the **Manage Images** links to display the Manage Images page, where you can add, edit and delete a wider range of images.
4. Click **Preview** to view what the image will look like on the web page.
5. Click **Save**.

Client Gateway

Setting Up Branding Preferences

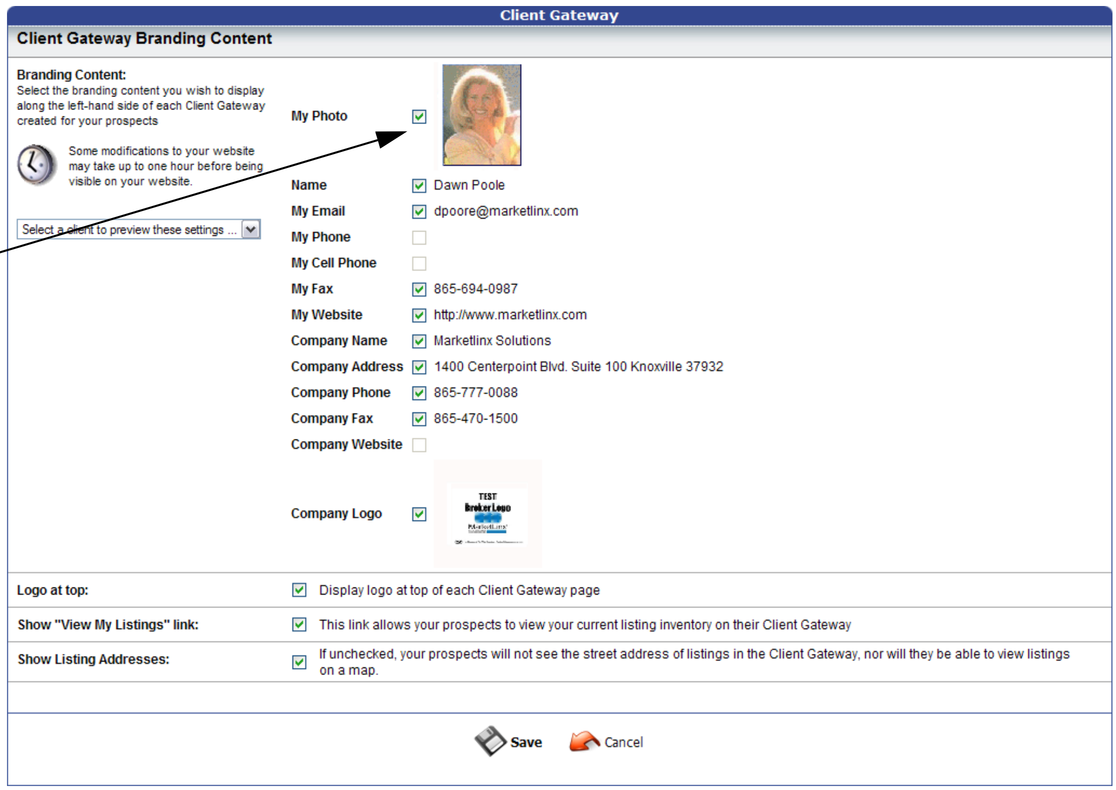
TEMPO 5 enables you to easily set up and manage the appearance and content of the Client Gateway for your prospects. From this page, you can specify your branding content, then preview it as your prospects would see it.

To set up Client Gateway branding preferences:

1. Click **My Tools > Preferences > Client Gateway**.

   The Client Gateway Branding Content page opens.

From the My Preferences & Settings page, click **My Photos** to add or change your photo selection.



2. Select the check boxes for the items you want included, such as a photo, logo or company information.
3. Click **Save**.

NOTE! *The clock icon indicates that any changes made may take up to one hour before taking effect.*

4. Click the drop-down list box and select a client to preview these settings.

   The Personalized Real Estate Site for [client name] opens automatically in a new browser window. See *"Viewing in Agent Access Mode" on page 259*.

5. Close the browser window when you are done.

Viewing in Agent Access Mode

You can preview the Client Gateway as your prospects would see it, but with a few differences in functionality:

- The **Reject** tab is only available in Agent Access Mode.
- Saving a property as a Favorite or Possibility is not available in Agent Access Mode.
- Deleting a property (which moves it to the **Rejects** folder) is not available in Agent Access Mode.
- Adding notes to saved listings is not available in Agent Access Mode.

While you cannot save or delete listings, or add notes, in Agent Access Mode, this functionality **is** available within Tempo from the Prospect Manager and the hover bar in all search results lists.

The branding content you specified is displayed.

To view the Client Gateway in Agent Mode:

1. From the main menu, click **Prospects**, and then click **Prospect Manager**.

   The Prospect Manager page opens. See *"Working with the Prospect Manager" on page 87*.

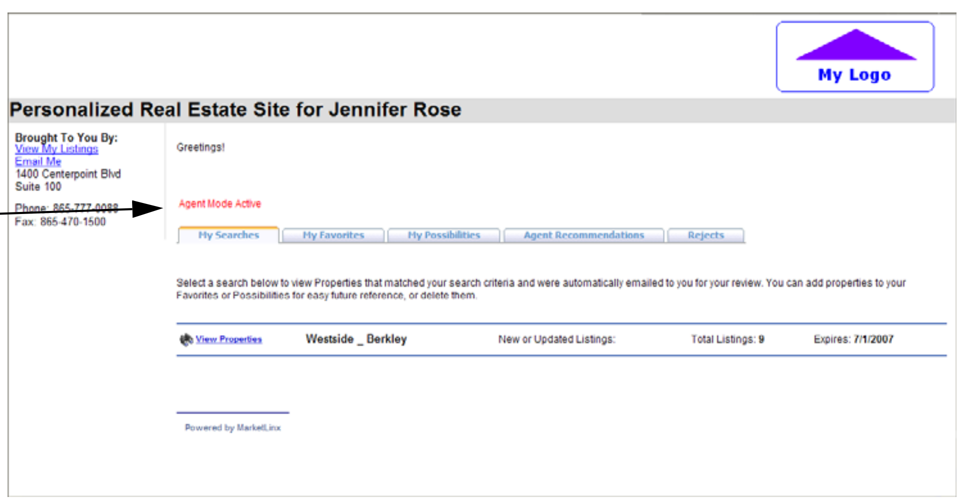
TIP … You can also click the Prospect Name hyperlink to open the contact record. Then, click the Client Gateway tab.

2. Click the [ ] icon that appears in the last column of a prospect on the Prospect Manager page.

   Note: The icon is displayed only for those prospects who have access to a personalized page on your web site.

   The Personalized Real Estate Site for [Prospect Name] page opens in a new Browser window.

Message indicates that the view is in "Agent Mode".



3. The following hyperlinks are available:
   - **View My Listings** — opens the Search Results page of your current inventory.

- **Email Me** — opens an Email pop-up window, addressed to you from the prospect.

4. Click each of the tabs to view property details within the category.

My Searches Tab

This page lists all defined searches that are associated with the prospect, provided auto-notification is turned ON and hasn't expired. See *"Setting Up Notifications" on page 101*. The prospect can view properties, saving those they like as **Favorites** or **Possibilities**.

To view search details:

1. Click the **View Properties** link of the search you want to see.

   A list of search results opens.

Click the **Sort by** drop-down list and select the **Ascending** or **Descending** option buttons to list the properties accordingly.

2. Review the property information, including notes. Click the photo to see an enlargement.
3. Click the **Sort by** drop-down arrow and choose a category to sort by: **Match Date**, **Address**, **List Price**, etc.
4. Select either the **Ascending** or **Descending** sort option button.
5. Click **Map Properties** to view a map of the property.
6. If there are multiple pages, click either the **Page** or **Next** links on the right side.
7. For each property, click the **View Details** link to request more information, view photos, print a flyer, map property, request more information etc.

My Favorites Tab

This page lists properties you save as your "favorites", along with any associated comments. New comments are indicated by a yellow **New** icon.

To view favorite properties:

- View the details of your favorite properties using the same sorting, mapping tools as found on the **My Searches** tab. See *"My Searches Tab" on page 260*.

My Possibilities Tab

This page lists properties you saved as "possibilities", along with any associated comments.

To view possible properties:

- View the details of the possible properties using the same sorting, mapping tools as found on the **My Searches** tab. See *"My Searches Tab" on page 260*.

Agent Recommendations Tab

This page lists agent recommended properties, along with any associated comments.

To view agent recommendations:

- View the details of Agent recommended properties using the same sorting, mapping tools as found on the **My Searches** tab. See *"My Searches Tab" on page 260*.

Rejects Tab

Note: This tab is only available to the Agent when viewing the Client Gateway in Agent Mode. Prospects do not see this tab.

This page displays the properties that have been rejected by either you or your prospect.

To view rejected properties:

- View the details of rejected properties using the same sorting, mapping tools as found on the **My Searches** tab. See *"My Searches Tab" on page 260*.

Additional Properties

This page displays listings that were manually e-mailed to your prospect.

To view additional properties:

- View the details of additional properties using the same sorting, mapping tools as found on the **My Searches** tab. See *"My Searches Tab" on page 260*.

Viewing in Prospect Mode

When you e-mail selected properties of interest to a prospect, you can add them to the Client Gateway as Agent Recommendations. This means that when your prospect clicks the personal property search web site link from your e-mail message, they can view property details, your comments and ratings. In addition, they can add properties to their Favorites or Possibilities categories, or delete them.

When your prospect receives listings through e-mail, the Gateway link in the message will take the prospect directly to those listings. Links in autonotification e-mails open the Gateway page for the custom search that returned the listings (with the new or changed properties at the top of the list); links in manually-sent e-mails link directly to the Additional Properties tab, where the listings you sent are displayed first.

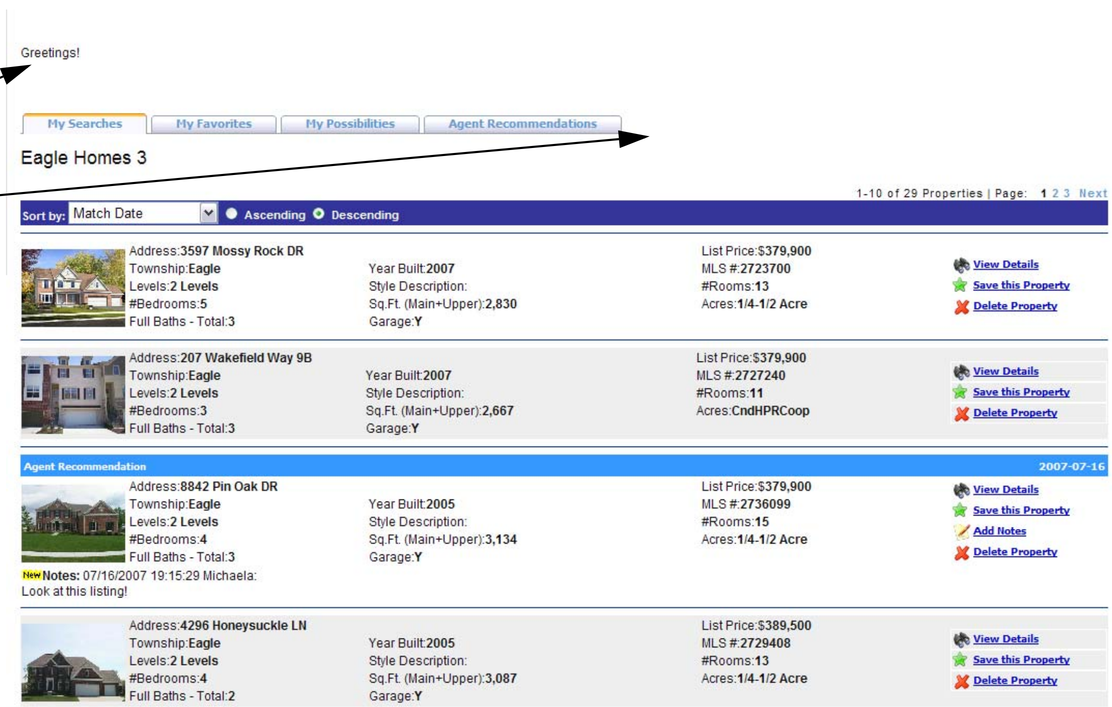
To view the Client Gateway in Prospect Mode:

1. Perform a property search, then click the **Email** button.
2. Select the **Send link to Client Gateway** option button.
3. From the e-mail message, click the **Click here to view your personal property search web site** link.

   A new browser window opens displaying the selected search results. The column header will say **New Emailed Property**.

Your personal greeting is displayed here.

Notice that the **Rejects** tab is not available in Prospect Mode.



4. On the My Searches tabbed page, click the **Sort by** drop-down arrow and choose a category to sort by: **Match Date**, **Address**, **List Price**, etc.
5. Select either the **Ascending** or **Descending** sort option button.

6. If there are multiple pages, click either the **Page** or **Next** links on the right side.
7. For each property, click the **View Details** link to see more information, view photos, print a flyer, etc.

Printing

Printing Contact Information

The Print feature lets you print contact information in a variety of different formats, from contact lists to custom-designed reports and mailing labels.

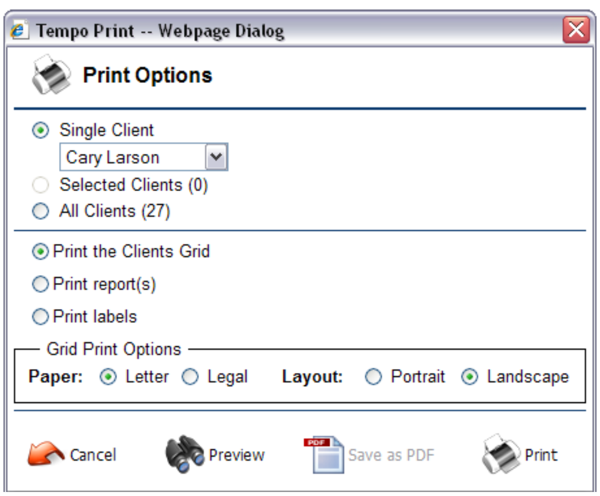
Client Lists

The Contact Manager page displays a list of client records. Depending on the **Display** filter chosen, you can list only specific types of contacts.

To print a client list:

1. From the Contact Manager page:
   - select a single client record from the list, point to the Information icon to display the Quick Access menu, then click the **Print** icon; or
   - select multiple client records in the list, then click the **Print** button in the bottom right corner of the page.

   The Print dialog box opens.



NOTE! *Regardless of which clients you selected in the Contact Manager list, you can still change your selection directly from the Print dialog.*

2. Choose one of the client option buttons:
   - **Single Client** — click the drop-down list and select an individual client by name. This selection can be different from the one you selected earlier.
   - **Selected Clients** (#) — click this option to print the client records you selected on the Contact Manager page.
   - **All Clients** (#) — select this option to print a list of all client records in the TEMPO 5 database. The total number is displayed in brackets.
3. Select the **Print the Clients Grid** option.

Note: If you are printing a report or labels, see *"Client Reports" on page 267* *and* *"From the security settings panel, click the Trusted Sites icon." on page 271**.*

The **Grid Print Options** appear in the bottom section of the dialog.

4. Select a **Paper** size option: **Letter** or **Legal**.
5. Select the **Layout** or orientation option: **Portrait** or **Landscape**.

NOTE! *If you choose* ***Landscape*** *orientation for your page* ***Layout****, you may also have to set your printer's paper orientation to Landscape. To do this, click* ***Properties*** *on the Print dialog box before starting the print job.*

6. Click **Preview** to see what the report will look like.

   Note: The ***Save as PDF*** *button is not available for this report.*

7. Click **Print**.

   A standard Windows Print dialog box opens.

8. Choose any additional options (e.g., number of copies, destination printer, etc.).
   - click **Properties** to specify your printer's **Layout** and **Paper/Quality** settings.
9. Click **OK**.

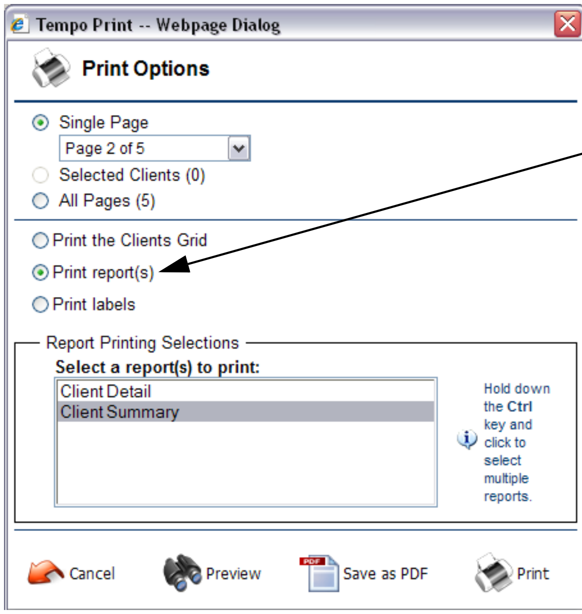
Client Reports

A client report is more than just the grid list of column information. It shows the details of each of the selected client records, depending on the report layout you have applied.

To print a detailed client report:

1. From the Contact Manager page:
   - select a single client record from the list, point to the Information icon to display the Quick Access menu, then click the **Print** icon; or
   - select multiple client records in the list, then click the **Print** button in the bottom right corner of the page.

The Print dialog box opens.



Make sure you select the client(s) from the grid before you select the **Print report** option. The top section of the Print dialog replaces client selection with report page selection.

2. Select the **Print report(s)** option, if it is not already selected.

   Note: If you are printing a client grid list or labels, see "Client Lists" on page 266 and "From the security settings panel, click the Trusted Sites icon." on page 271.

   The report page options appear in the top of the dialog, and the **Report Printing Selections** appear in the bottom of the dialog.

3. In the **Report Printing Selections** section, select one or more reports you want to print from the list.
   - to select multiple reports, hold down the **CTRL** key and click.

4. In the top section of the dialog, the report page options are displayed, depending on the types of reports you selected:
   - **Single Page** — click the drop-down list and select the page you want to print, e.g. **Page 1 of 2**.
   - **Selected Clients** (#) — click this option to print the selected reports for the clients currently selected on the Contact Manager page.
   - **All Pages** (#) — select this option to print all pages of the report. The total number is displayed in brackets.

5. Click **Preview** to see what the report will look like.

6. Click the **Save as PDF** button to save the report in Portable Document Format. See *"Saving a Report as a PDF Document" on page 269*.

7. Click **Print**.

   A standard Windows Print dialog box opens.

8. Choose any additional options (e.g., number of copies, destination printer, etc.).

- click **Properties** to specify your printer's **Layout** and **Paper/Quality** settings.

9. Click **OK**.

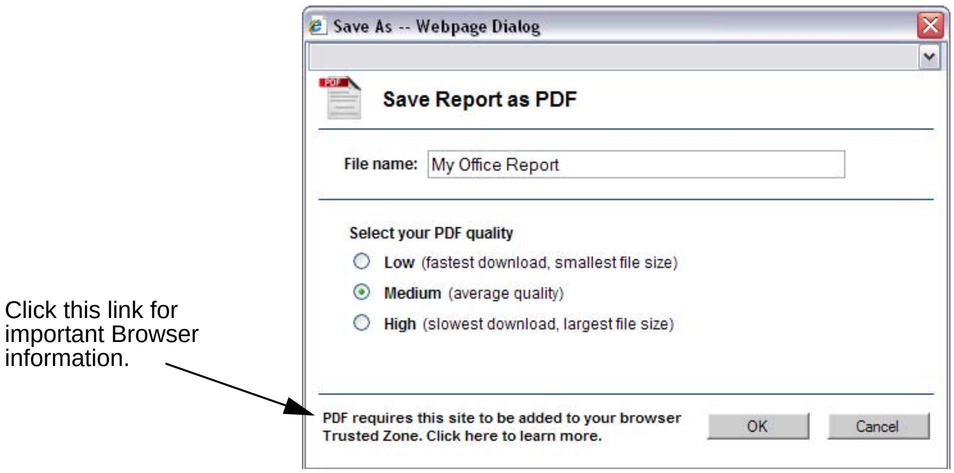
Saving a Report as a PDF Document

Instead of printing a hard copy of the report, you can save it as an electronic copy. Portable Document Format (PDF) is a very useful way to save and store documents.

Note: The Save as PDF option is not available for client list reports, or mailing labels.

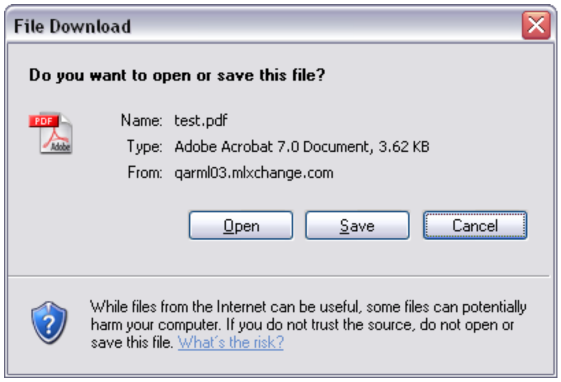
1. From the Print dialog box, click the **Save as PDF** button.

   The Save Report as PDF dialog opens.



2. Enter a **File name** in the field.
3. In the **Select your PDF quality** section, choose the option that best suits your needs:
   - **Low** — maximum file compression means a smaller file size for the fastest download time. Quality is low.
   - **Medium** — average file compression means a medium file size for an average download time. Quality is average.
   - **High** — minimum file compression means a larger file size for the slowest download time.
4. Click **OK**.

The File Download dialog opens, asking if you want to open or save the file.



5. Click **Open** to see the document in Adobe® Reader®.

   Note: If you don't have Adobe Reader, you can download it for free from the Adobe Web site.

6. Click **Save** to store the document on your computer.

   The Save As dialog opens.

7. Navigate to a location on your computer, then click **Save**.

Internet Explorer Settings for Saving Reports as PDF Documents

When you try to save a report as a PDF document, Internet Explorer may prompt you to allow the download. You may be able to eliminate these prompts by changing your browser settings.

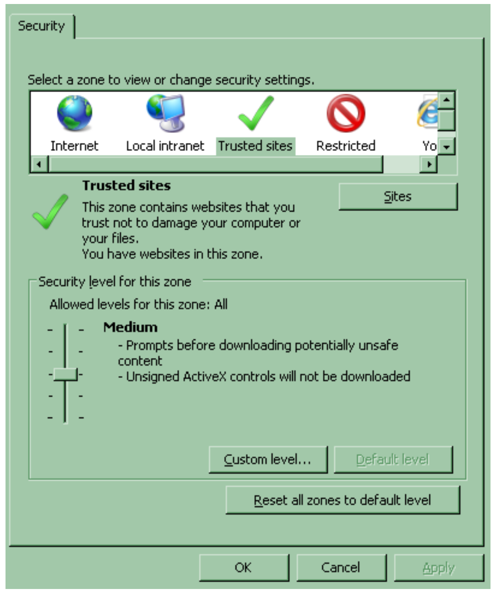
Note: Before you begin, your Tempo site must be included in your list of Internet Explorer trusted sites. See the Internet Explorer help files, or click the browser information link in the Save Report as PDF dialog, for instructions on how to add Tempo to your trusted sites list.

To change your browser settings:

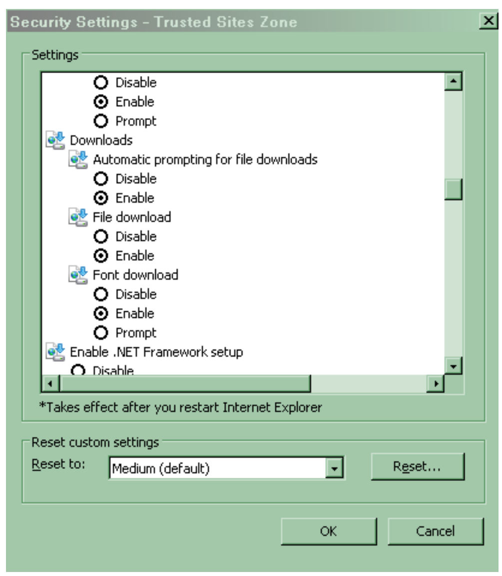
1. Double-click the **Trusted Sites** icon in the browser's status bar [

   ]. The Internet Explorer security settings panel will open:



2. From the security settings panel, click the **Trusted Sites** icon.
3. Click the **Custom Level** button to open the trusted sites security settings panel.



4. Scroll down to the **Downloads** section and enable the **Automate prompting for file downloads** setting.
5. Click **OK**.
6. When prompted to confirm the change, click **Yes**. The trusted sites security settings panel will close.
7. Click **OK** to close the Internet Explorer security settings panel.

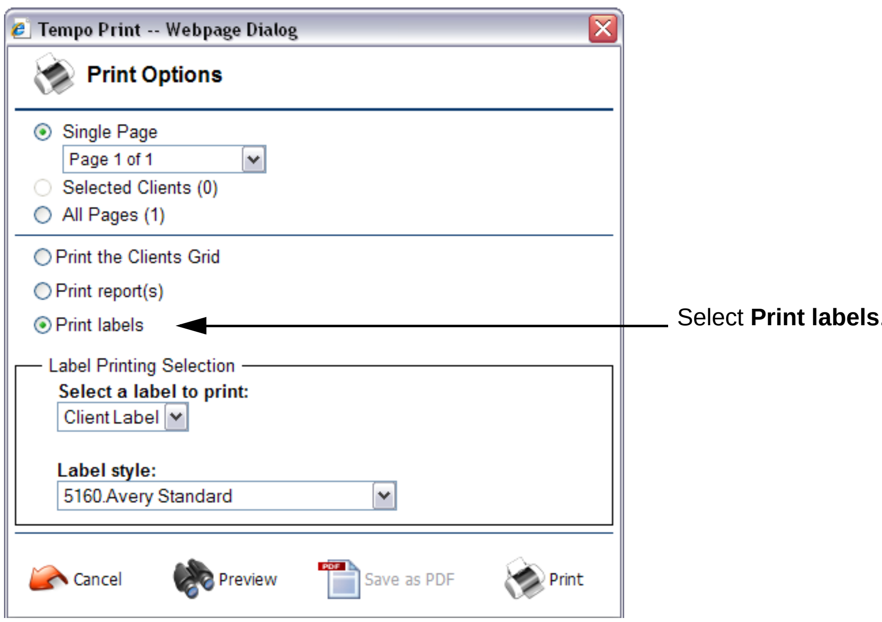
Client Labels

Client labels are mailing labels set up in a report format.

To print client mailing labels:

1. From the Contact Manager page:
   - select a single client record from the list, point to the Information icon to display the Quick Access menu, then click the **Print** icon; or
   - select multiple client records in the list, then click the **Print** button in the bottom right corner of the page.

   The Print dialog box opens.



2. Select the **Print labels** option, if it is not already selected.

   Note: If you are printing a client grid list or a report, see *"Client Lists" on page 266* and *"Client Reports" on page 267*.

   The label report page options appear in the top of the dialog, and the **Label Printing Selection** options appear in the bottom of the dialog.
3. In the **Label Printing Selection** section in the bottom of the dialog, click:
   - the **Select a label to print** drop-down list and choose the label report, such as **Client Label**.
   - the **Label style** drop-down list and choose the Avery number that matches the kind of labels you are using.
4. In the top of the dialog, choose one of the label page options:
   - **Single Page** — click the drop-down list and select a label page(s) to print, e.g. **Page 1 of 1**.

- **Selected Clients** (#) — click this option to print labels for the clients currently selected on the Contact Manager page.
- **All Pages** (#) — select this option to print all pages of the label report.

5. Click **Preview** to see what the report will look like.

   *Note: The **Save as PDF** button is not available for this report.*

6. Click **Print**.

   A standard Windows Print dialog box opens.

7. Choose any additional options (e.g., number of copies, destination printer, etc.).
   - click **Properties** to specify your printer's **Layout** and **Paper/Quality** settings.

8. Click **OK**.

Printing Listing Search Results

The Print feature lets you print property listing information in a variety of different formats, from property lists to custom-designed detailed reports.

Property Lists

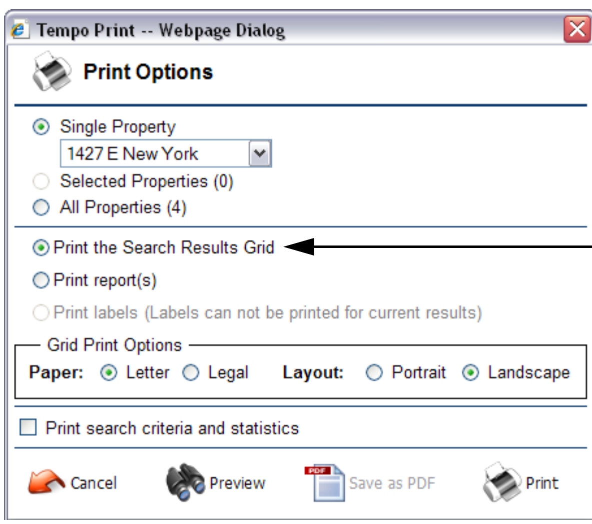
The Search Results page displays a list of property records that match a query. The property lists can be printed from the Search Results or Search Details pages.

To print a list of search results:

1. From the Search Results page:
   - select a single listing record from the list, point to the Information icon to display the Quick Access menu, then click the **Print** icon; or
   - select multiple listing records, then click the **Print** button in the bottom right corner of the page.

   Note: To print all of the records, do not select any of them.

   The Print dialog opens.



Select **Print the Search Results Grid** option.

NOTE! *Regardless of which properties you selected on the Search Results list, you can still change your selection directly from the Print dialog.*

2. Select the **Print the Search Results Grid** option if it is not already selected.

   Note: If you are printing a listing report, see *"Detailed Listing Reports" on page 275**. Label printing is not available for listing reports.*

3. In the top of the dialog, choose one of the options:
   - **Single Property** — click the drop-down list and select a property listing to print.

- **Selected Properties** (#) — click this option to print the listing records you selected on the Search Results page.
- **All Properties** (#) — select this option to print all listings.

4. In the **Grid Print Options** section, select:
   - a **Paper** size option: **Letter** or **Legal**.
   - the **Layout** or orientation option: **Portrait** or **Landscape**.

NOTE! *If you choose **Landscape** orientation for your page **Layout**, you may also have to set your printer's paper orientation to Landscape. To do this, click **Properties** on the Print dialog box before starting the print job.*

5. If you want the report to show the search criteria you used to find the listings, and their search statistics (e.g., average list price, average sale price, days on market, etc.), select the **Print search criteria and statistics** check box.
6. Click **Preview** to see what the report will look like.

   *Note: The **Save as PDF** button is not available for this report.*
7. Click **Print**.

   A standard Windows Print dialog box opens.
8. Choose any additional options (e.g., number of copies, destination printer, etc.).
   - click **Properties** to specify your printer's **Layout** and **Paper/Quality** settings.
9. Click **OK**.

Detailed Listing Reports

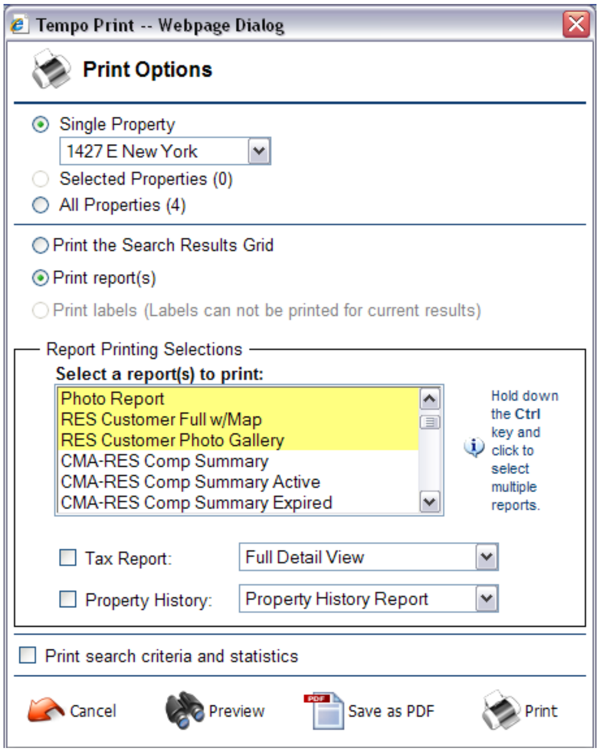
The detailed listing reports can be printed from the Search Results or Search Details pages. If you choose **Print** from the Search Details page, there may be additional print options, such as the ability to print a Tax report.

To print a detailed listing report:

1. From the Search Results page:
   - select a single property listing from the list, point to the Information icon to display the Quick Access menu, then click the **Print** icon; or
   - select multiple property listings in the list, then click the **Print** button in the bottom right corner of the page.

   Note: To print all of the records, do not select any of them.

The Print dialog box opens.



2. Select the **Print report(s)** option, if it is not already selected.

   Note: If you are printing a property list, see *"Property Lists" on page 274*.

   The report page options appear in the top of the dialog, and the **Report Printing Selections** appear in the bottom of the dialog.

3. In the **Report Printing Selections** section, select one or more reports you want to print from the list.
   - to select multiple reports, hold down the **CTRL** key and click.

   Note: The reports highlighted in yellow are your favorite reports. See *"Choosing Your Favorite Reports" on page 46*.

4. In the top section of the dialog, the report page options are displayed, depending on the types of reports you selected:
   - **Single Page** — click the drop-down list and select the page you want to print, e.g. **Page 1 of 6**.
   - **Selected Properties** (#) — click this option to print the property listings you selected on the Search Results page.
   - **All Pages** (#) — select this option to print all pages of the report. The total number is displayed in brackets.

5. To include a tax report (not available in all areas), select the **Tax Report** check box, then use the drop-down list to select the name of a report.

6. To include a history report, select the **Property History** check box, then use the drop-down list to select the name of a report.

7. If you want the report to show the search criteria you used to find the listings, and their search statistics (e.g., average list price, average sale price, days on market, etc.), select the **Print search criteria and statistics** check box.
8. Click **Preview** to see what the report will look like.
9. Click the **Save as PDF** button to save the report in Portable Document Format. See *"Saving a Report as a PDF Document" on page 269*.
10. Click **Print**.

    A standard Windows Print dialog box opens.
11. Choose any additional options (e.g., number of copies, destination printer, etc.).
    - click **Properties** to specify your printer's **Layout** and **Paper/Quality** settings.
12. Click **OK**.

Printing Hotsheet Reports

The Hotsheet Search Reports page displays a list of property records that match a specific Hotsheet query. Using various filters you can narrow the list of information. Using the **Displays** drop-down list you can apply a number of different column layouts and print the resulting report.

When you click the **Reports** tab to view the listing details, there are multiple tabs containing different types of data, for example, MLS Data, Tax Data, etc. Print a detailed report no matter which tab you are viewing. Reports include MLS Data, Property History and Tax information.

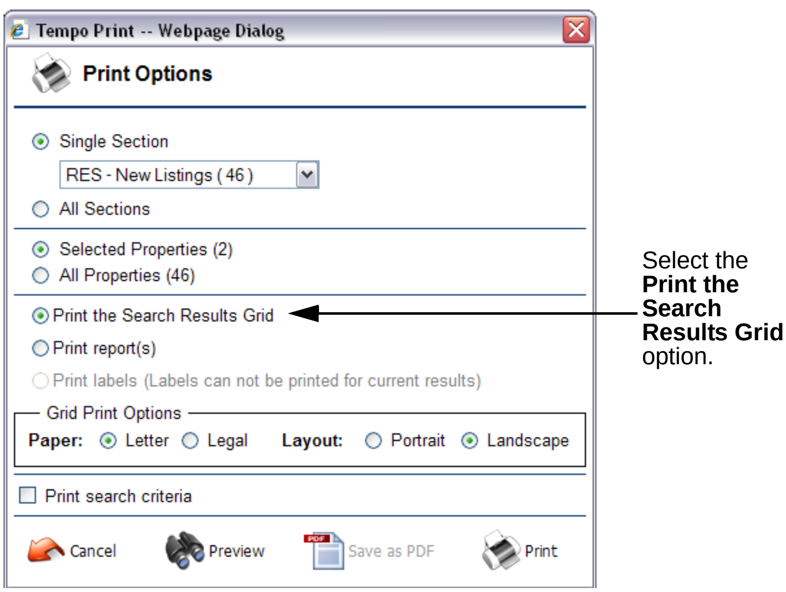
Hotsheet Lists

The Hotsheet Search Results page displays a list of records, also known as the results grid, that match the search criteria. The grid is a summary view, which you can print or e-mail, using the **Default hotsheet display** layout or other column reports. See *"Managing Column Reports" on page 318*.

To print a list of hotsheet search results:

1. From the Hotsheet Search Results page, select one or more listings in the list, then click the **Print** button in the top, right corner of the page.

   The Print dialog opens.



NOTE! *Regardless of which hotsheets you selected on the Results list, you can still change your selection directly from the Print dialog.*

2. Select the **Print the Search Results Grid** option if it is not already selected.

*Note: If you select the **Print report** option, the details from the **MLS Data** tab of the listing record is printed. see* *"Detailed Hotsheet Reports" on page 279**. Label printing is not available for hotsheet reports.*

3. In the top of the dialog, choose one of the options:
   - **Single Section** — click the drop-down list and select a type of property to print.
   - **All Sections** — click this option to print all hotsheet sections.
   - **Selected Properties** (#) — click this option to print only those listing records you selected on the Hotsheet Search Results page.
   - **All Properties** (#) — select this option to print all listings on the Hotsheet Search Results page.
4. In the **Grid Print Options** section, select:
   - a **Paper** size option: **Letter** or **Legal**.
   - the **Layout** or orientation option: **Portrait** or **Landscape**.

NOTE! *If you choose **Landscape** orientation for your page **Layout**, you may also have to set your printer's paper orientation to Landscape. To do this, click **Properties** on the Print dialog box before starting the print job.*

5. If you want the report to show the search criteria you used to find the listings, and their search statistics (e.g., average list price, average sale price, days on market, etc.), select the **Print search criteria** check box.
6. Click **Preview** to see what the report looks like.

   *Note: The **Save as PDF** button is not available for this report.*
7. Click **Print**.

   A standard Windows Print dialog box opens.
8. Choose any additional options (e.g., number of copies, destination printer, etc.).
   - click **Properties** to specify your printer's **Layout** and **Paper/Quality** settings.
9. Click **OK**.

Detailed Hotsheet Reports

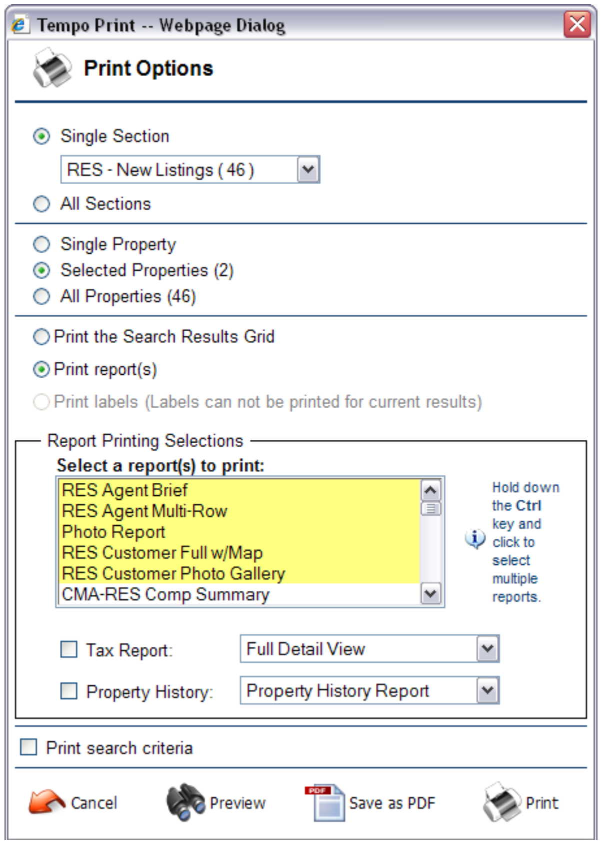
The Hotsheet Reports page displays the detailed property information for the listings that match the search criteria. If you choose **Print** from the Reports page, you can generate additional types of detailed reports, such as a Tax report, depending on which of the tabs you have selected.

To print one or more detailed Hotsheet reports:

1. From the Hotsheet Reports page, scroll through the properties and select one or more listings.
   - click the drop-down list, highlight a specific address, and select the check box.

2. Click the **View** drop-down list in the top right corner and select the type of report you want.
3. Click the **Print** button in the bottom right corner of the page.

   The Print dialog opens.



Remember, your favorite reports are marked in yellow and appear at the top of the list.

NOTE! *Regardless of which properties you selected on the Search Results list, you can still change your selection directly from the Print dialog.*

4. Select the **Print report(s)** option if it is not already selected.

   Note: If you selected the Print the Search Results Grid option, the grid list is printed. See *"Printing Hotsheet Reports" on page 278**. Label printing is not available for hotsheet reports.*

5. In the top of the dialog, choose one of the options:
   - **Single Property** — the field displays the address of the record you are currently viewing. Click the drop-down list to select a different address.
   - **Selected Properties** (#) — click this option to print the property listings you selected on the Hotsheet Search Results page.
   - **All Properties** (#) — select this option to print all pages of the selected reports. The total number is displayed in brackets.
6. In the **Report Printing Selections** section, select one or more reports to print from the drop-down list.
   - hold down the ***CTRL*** key and click to select multiple reports.

Note: When you select a report with multiple pages, the options in the top part of the dialog change to allow you to print specific pages.

7. Click one or both of the check boxes, if you want to print these additional reports:
   - **Tax Report** — click the drop-down list and choose a report.
   - **Property History** — click the drop-down list and choose a report.
8. If you want the report to show the search criteria you used to find the listings, and their search statistics (e.g., average list price, average sale price, days on market, etc.), select the **Print search criteria** check box.
9. Click **Preview** to see what the report looks like.
10. Click the **Save as PDF** button to save the report in Portable Document Format. See *"Saving a Report as a PDF Document" on page 269*.
11. Click **Print**.

    A standard Windows Print dialog box opens.
12. Choose any additional options (e.g., number of copies, destination printer, etc.).
    - click **Properties** to specify your printer's **Layout** and **Paper/Quality** settings.
13. Click **OK**.

Printing a CMA Presentation

Once the CMA presentation is complete, there are a couple of ways to present the final report to your client. You can save the presentation as a PDF file, which can be easily distributed. The recipient requires Adobe® Reader (available for free from the Adobe web site) to open and read a PDF file.

You can print a CMA presentation, in its entirety or one page at a time.

To print a selected CMA:

1. From within the CMA Report Wizard, click step #8 — **View Report**, to go to the View Report page.
2. To add, remove and/or change the order of the pages in the CMA presentation, click step #7 — **Select Pages** in the CMA Report Wizard side panel. See *"Selecting Pages for the CMA Presentation" on page 164*.

NOTE! *Adding, removing, and changing the order of the reports in this way does NOT change the presentation template, only this particular CMA presentation.*

3. Click one of the print buttons:
   - **Print Current Page** — lets you print a single selected page of the CMA.
   - **Print** — lets you print the entire CMA presentation.

   A standard Windows Print dialog opens.
4. Choose any additional report options (e.g., number of copies, destination printer, etc.), then click **Print**.
5. Click **Close**.

   You are returned to the CMA Manager.

My Tools

Overview

TEMPO 5 contains a variety of tools for performing maintenance in the following areas:

- **Preferences** — Use the My Preferences & Settings page to customize a wide range of program settings, including your contact information, photos, favorite reports, e-mail preferences, default prospecting templates, website management and Home page resource links to reflect your personal preferences. This functionality is described in another section. See *"Personalizing Settings for the Way You Work" on page 34*.
- **Staff Tools** — These tools include the Listing Manager, Hotsheet Manager, Membership/Office maintenance, Images, Message of the Day, Third Party Maintenance and System Tools. Listing Manager is discussed in another section. See *"Listing Manager" on page 111*.
- **Change Password** — Use the Change Password and Secret Question page to change your password for logging in to TEMPO 5. If you should forget your password, you can enter your secret question and answer as a way for the system to identify you. This functionality is described in another section. See *"Changing Your Password and Secret Question" on page 306*.
- **IDX Configuration** — Access a list of accounts and owner profiles.
- **IDX Member Permissions** — Search for and modify member permissions.

Staff Tools

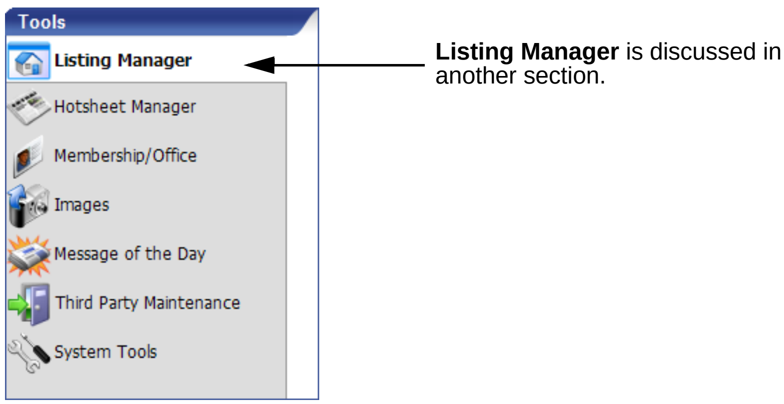
TEMPO 5 contains a variety of staff tools for performing membership and office maintenance, as well as links to Listing Manager, Hotsheet Manager, Images, Message of the Day, Third Party Maintenance and System Tools.

NOTE! *The Staff Tools area is reserved for those who have the necessary access privileges to set up and manage membership and office information, including images and Message of the Day content.*

To access Staff Tools:

1. From the main menu, click **My Tools** > **Staff Tools**.

   The Tools page opens.



2. Click the desired menu item in the sidebar.

   The corresponding page opens.

Hotsheet Manager

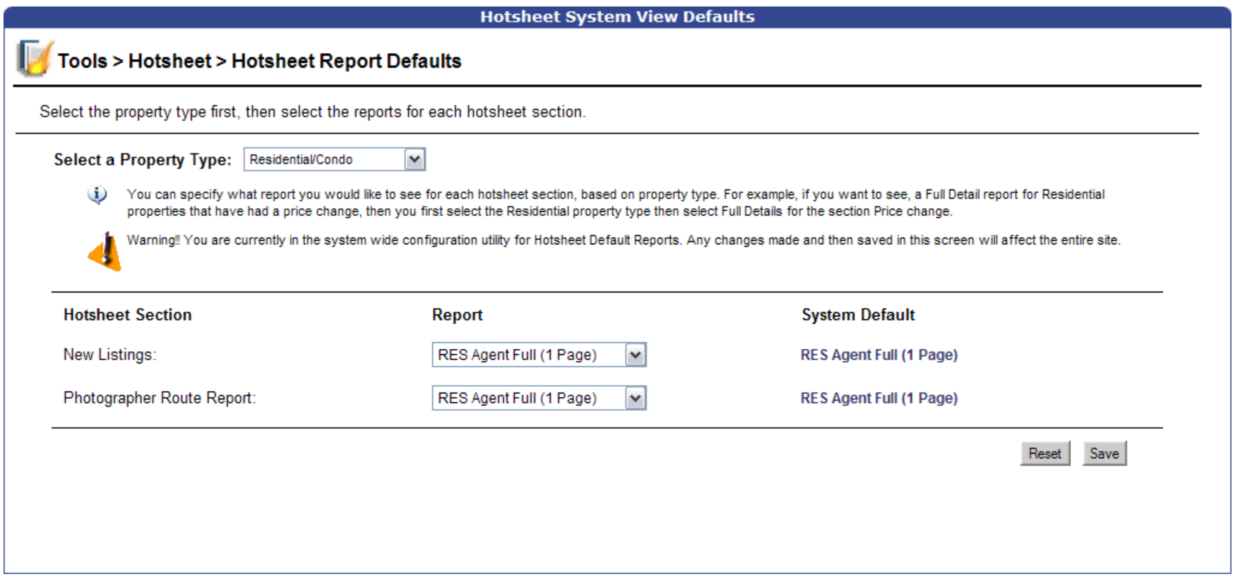
The Hotsheet Manager lets you specify what report to use for each Hotsheet section on the home page, based on the property type.

NOTE! *This is a system-wide area of the program. Any changes you save in this area will affect the entire site.*

To specify default hotsheet reports:

1. From the Tools page sidebar, click **Hotsheet Manager**.

   The Hotsheet System View Defaults page opens.



2. Click the **Select a Property Type** drop-down list and choose a category, for example, **Residential/Condo**.

   The bottom section of the page displays the corresponding hotsheet sections within the selected property type and the currently selected report. The **System Default** column reminds you of the name of the system default report.

3. For each **Hotsheet Section**, click the corresponding **Report** drop-down list and choose the name of the report you want to load automatically.
4. Click the **Save** button.
5. Repeat steps 3-4 for each property type.

Membership and Office Maintenance

Use the Membership/Office area to search for and find members or offices, manage existing user/office records, as well as to associate offices with firms. This is also where you can change a member's professional e-mail address and manage member images.

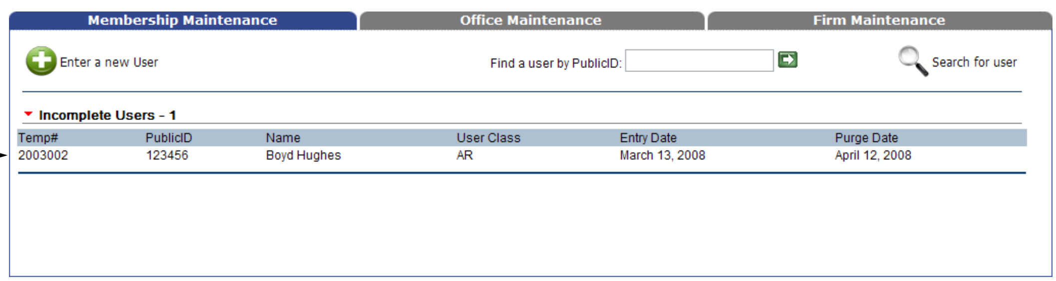
Membership Maintenance

The **Membership Maintenance** tab is where you can look for a member by searching by name, Office ID, etc. If you know the agent Public ID number, perform a quick search to retrieve the member's record. If there is no member record, add one and complete it now or later.

To search for a user:

1. From the Tools page sidebar, click **Membership/Office**.
2. Click the **Membership Maintenance** tab.

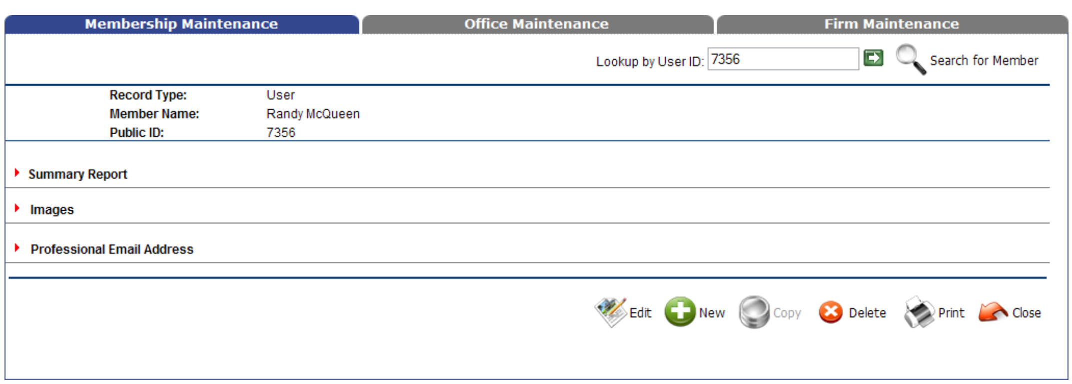
Any incomplete member records will be listed here.



3. Click the **Search for user** button.

   A Search page with Member System Search criteria fields opens.
4. Enter the search criteria, then click **Search** (or the **Search Results** tab). See *"Using the Search Criteria Page" on page 68*.
5. From the Search results, select a record, then click **Edit Selected User**.

   The user's record opens for viewing.



6. Click the links on the left side to expand each section and view the contents. For example, click **Summary Report** to view member information.
   - click the link again to collapse the section.
7. Click the action buttons to perform more tasks:
   - **Edit** — retrieves the user's record, letting you modify information.
   - **New** — creates a new user record to submit or save as incomplete. See *"Adding a New Member Record" on page 289*.
   - **Copy** — creates a new user record, by making a copy of this one.
   - **Delete** — deletes the record.
   - **Print** — lets you preview and print one or more member reports.
8. Click **Close**.

To search for a user by Public ID number:

1. From the Membership Maintenance page, enter the user's PublicID number in the field.
2. Click the arrow [] button.

   The user's record opens for viewing.
3. Follow step #6 - 8 above.

Member Images

You can only add and delete the images for one member record at a time.

To access the images for a selected member record:

1. From the Tools page, click **Images** to expand the section, then click **Member Images**.

   The User Inventory > User Summary page opens.
2. Search for a member:
   - click on the **Search for Member** link and perform a search. See *"Using the Search Criteria Page" on page 68*.
   - enter the member's ID number in the **Lookup by User ID** field, then click the arrow button.
3. From the Search Results page, select one member then click the **List Images with Selected Record** button.

   The images (if any) are loaded in the **Images** section of the Listing Summary page. The **Record Type**, **Member Name**, and **Public ID** for the selected member are displayed in the top left corner of the page.

   Note: You may find the Images are Locked, which means you do not have sufficient administration rights to edit them.
4. Click on a frame to highlight it.

A blue outline appears around the selected frame.

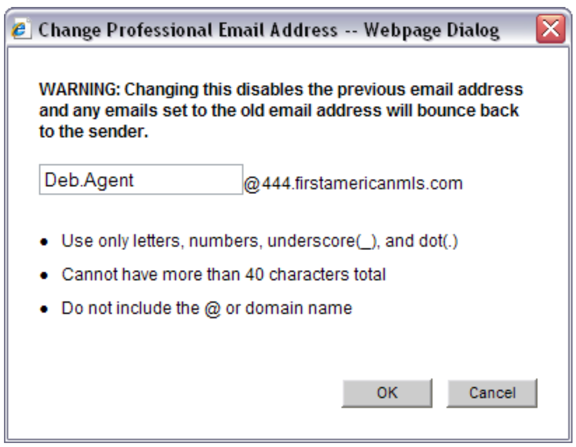
5. Do one of the following:
   - click the **Add New Image** link
   - click the **Edit** link.
   - click the **Delete** link.
   - click the **Reorder Image** arrow buttons to rearrange the position of the selected frame in the series.

To change the user's professional e-mail address:

1. Search for and retrieve the member record which you want to edit.
2. Click the **Professional Email Address** link to expand the section.

   The current e-mail address is displayed.
3. Click the **Change** link.

   The Change Professional Email Address dialog box opens.



4. Use the text box to type the new prefix to the e-mail address.
5. Click **OK**.

Adding a New Member Record

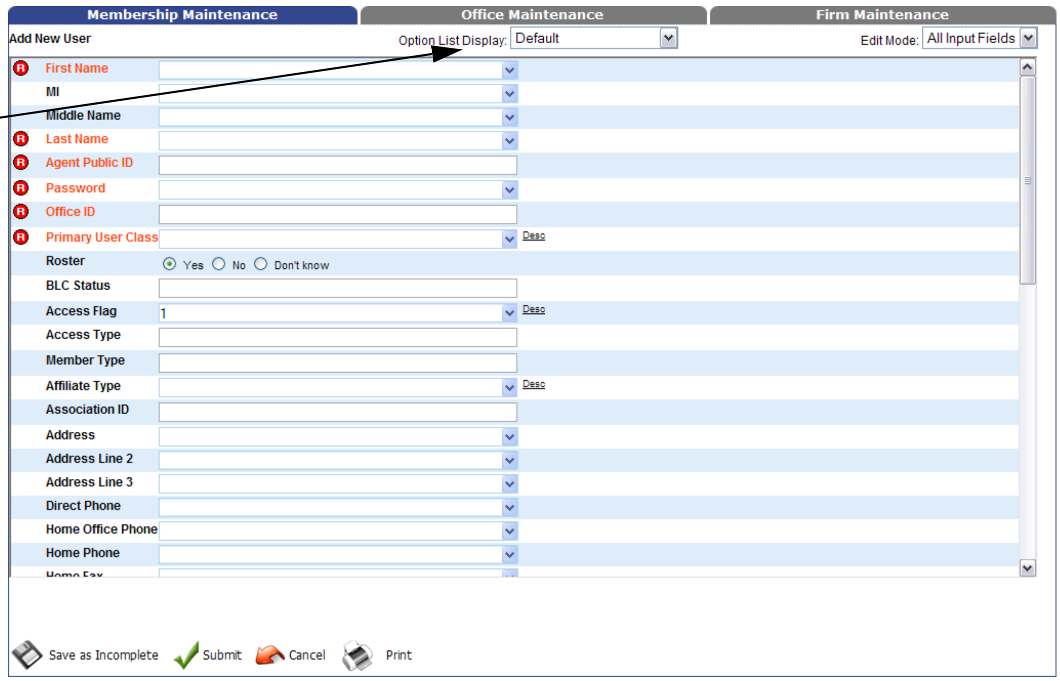
When you create a new user record, you can submit all the details, or enter only essential information, such as the name, and save it as "Incomplete". Incomplete records are listed on the Membership Maintenance page until they have been completed and submitted. See *"Completing an Incomplete Record" on page 290*.

To create a new user record:

1. From the Tools page sidebar, click **Membership/Office**.
2. Click the **Membership Maintenance** tab.
3. Click the **Enter a new User** button, located at the top of the page.

The Add New User page opens.

Click the **Option List Display** drop-down list to specify how the pick list fields display information: **Default**, **All as Short Code** or **All as Long Description**.



4. Enter the user's information in the fields.

   Note: All of the red fields [ ] are required and must be completed in order to submit this form.

5. Click one of the following action buttons:

   - **Save as Incomplete** — saves the unfinished record "as is" and lists it in the **Incomplete User** list on the main Membership Maintenance page.
   - **Submit** — saves the user record with a valid Public ID number to the database.
   - **Cancel** — cancels the current record. When the message box appears prompting you to confirm deletion, click **OK**.
   - **Print** — previews and prints a Member Information report based on the existing amount of information.

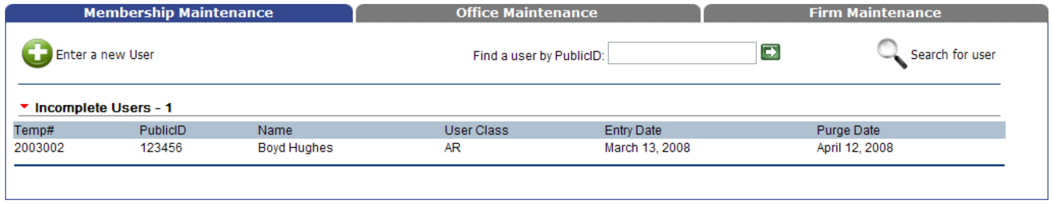
Completing an Incomplete Record

Incomplete records are unfinished user records that have not yet been submitted to the database and, therefore, has been assigned a Temp number. If not completed by the 30-day **Purge Date** shown in the last column, an incomplete record will be automatically deleted.

To complete an incomplete record:

1. From the Tools page sidebar, click **Membership/Office**.
2. Click the **Membership Maintenance** tab.

The **Incomplete Users** list is displayed.



3. Click an item in the list.

   The corresponding user record opens.

4. Complete the fields are required, then click **Submit**. See *“Adding a New Member Record” on page 289*.

   The item is no longer displayed in the **Incomplete Users** list.

Office Maintenance

The **Office Maintenance** tab is where you can perform a **Search for office**, or if you know the **Office Code**, perform a quick search to retrieve the office record. If there is no record, add a new office and complete it now or save it as incomplete for later.

To work with Office Maintenance:

1. From the Tools page sidebar, click **Membership/Office**.
2. Click the **Office Maintenance** tab.

NOTE! *The Office Maintenance area functions the same as the Member Maintenance area, from searching to saving incomplete records. Please follow the instructions in “Membership Maintenance” on page 287.*

Office Images

You can only add and delete the images for one office at a time.

To access the images for a selected office:

1. From the Tools page, click **Images**, then click the **Office Images** tab.

   The office record opens.

2. Search for an office:

   - click the **Search for office** button and perform a search. See *“Using the Search Criteria Page” on page 68*. From the Search Results page, select one property then click the **List Images with Selected Record** button.
   - enter the office number in the **Find an Office by Office Code** field, then click the arrow button.

   The images (if any) are loaded in the **Images** section of the record. The **Record type**, **Office Name** and **Office Code** are displayed in the top left corner of the page.

Note: You may find the Images are Locked, which means you do not have sufficient administration rights to edit them.

3. Click a frame to highlight it.

   A blue outline appears around the selected frame.

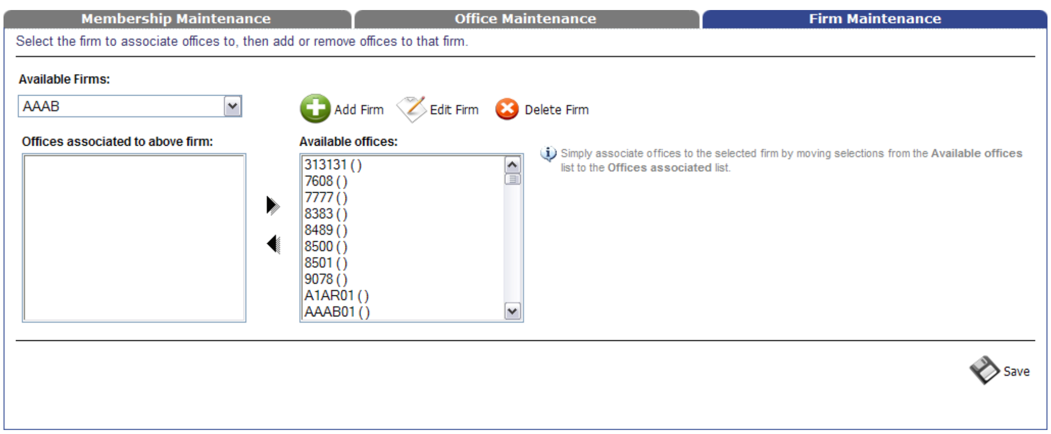
4. Do one of the following:
   - click the **Add New Image** link.
   - click the **Edit** link.
   - click the **Delete** link.
   - click the **Reorder Image** arrow buttons to rearrange the position of the selected frame in the series.

Firm Maintenance

The **Firm Maintenance** tab is where you can manage the offices associated with specific firms.

To work with Firm Maintenance:

1. From the Tools page sidebar, click **Membership/Office**.
2. Click the **Firm Maintenance** tab.



3. Click the **Available Firms** drop-down list and select a firm.
   - to add a firm, click the **Add Firm** button, enter the name and a description, then click **Save**.
4. Highlight an office in the **Available Offices** list, then click the left arrow [ ] button to move it to the **Offices associated to above firm** list.
5. Click **Save**.

Managing Images

The TEMPO 5 image managing feature lets you add images directly to listings or to your MLS. In addition, you can upload images in bulk and generate a summary or detailed Image Report.

Listing Images

You can only add or edit the images for one listing at a time.

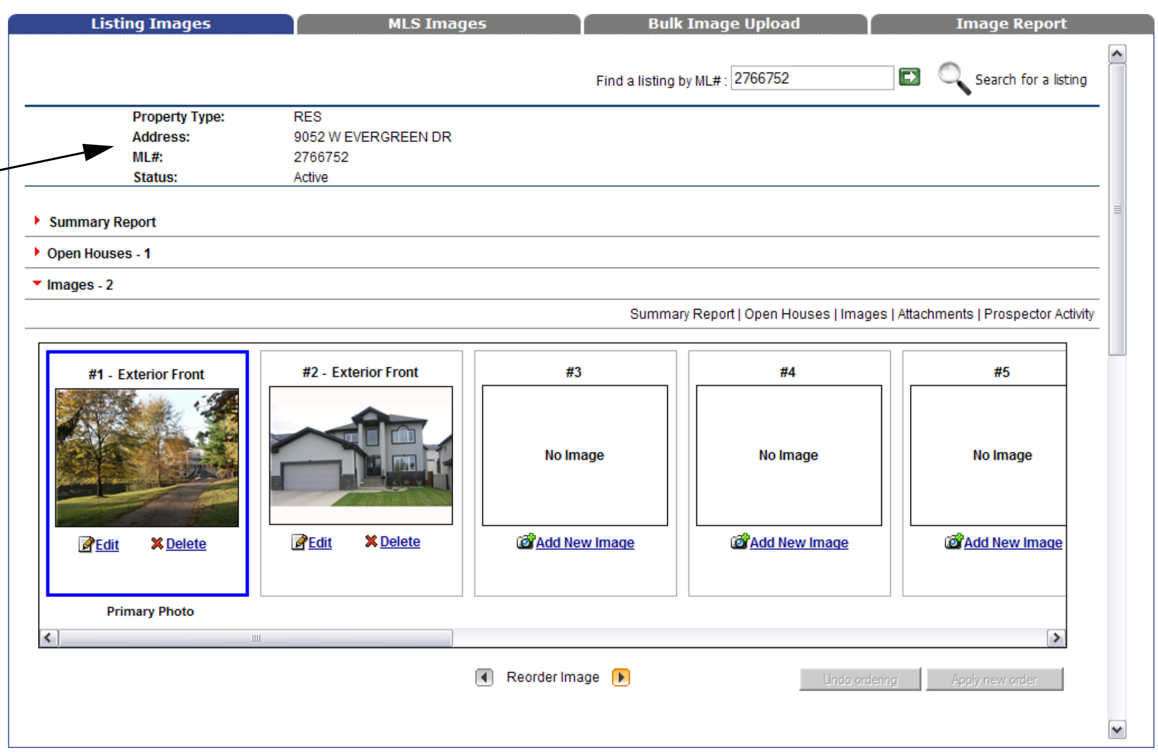
To access the images for a selected listing:

1. From the Tools page sidebar, click **Images**.

   The **Listing Images** tab opens (default selection).
2. Search for a listing:
   - click on the **Search for a listing** link and perform a search. See *"Searching" on page 63*; or
   - enter the MLS number in the **Find a listing by ML #** field, then click the arrow button.
3. From the Search Results page, select one property then click the **List Images with Selected Record** button.

   The property listing opens, displaying the listing's images (if any).

The **Property Type**, **Address**, **ML#** and **Status** of the listing are displayed here.



4. In the **Images** section, click on a frame to highlight the image.

A blue outline appears around the selected frame.

Note: You may find the Images are Locked, which means you do not have sufficient administration rights to edit them.

5. Do one of the following:
   - click the **Add New Image** link.
   - click the **Edit** link.
   - click the **Delete** link.
   - click the **Reorder Image** arrow buttons to rearrange the position of the selected frame in the series.
6. Use the Action buttons at the bottom of the page to perform more tasks on the selected listing. See *"Listing Maintenance" on page 112*.

MLS Images

This tab enables you to upload images to be used on your MLS Board, for example, logos, MLS staff, maps, letterhead, for sale sign images, etc.

To access the images for your MLS:

1. From the Tools page, click **Images**, then click the **MLS Images** tab.

   The MLS Images page opens.

   The images (if any) are loaded in the **Images** section of the record.

   Note: You may find the Images are Locked, which means you do not have sufficient administration rights to edit them.
2. Click a frame to highlight it.

   A blue outline appears around the selected frame.
3. Do one of the following:
   - click the **Add New Image** link.
   - click the **Edit** link.
   - click the **Delete** link.

Bulk Image Upload

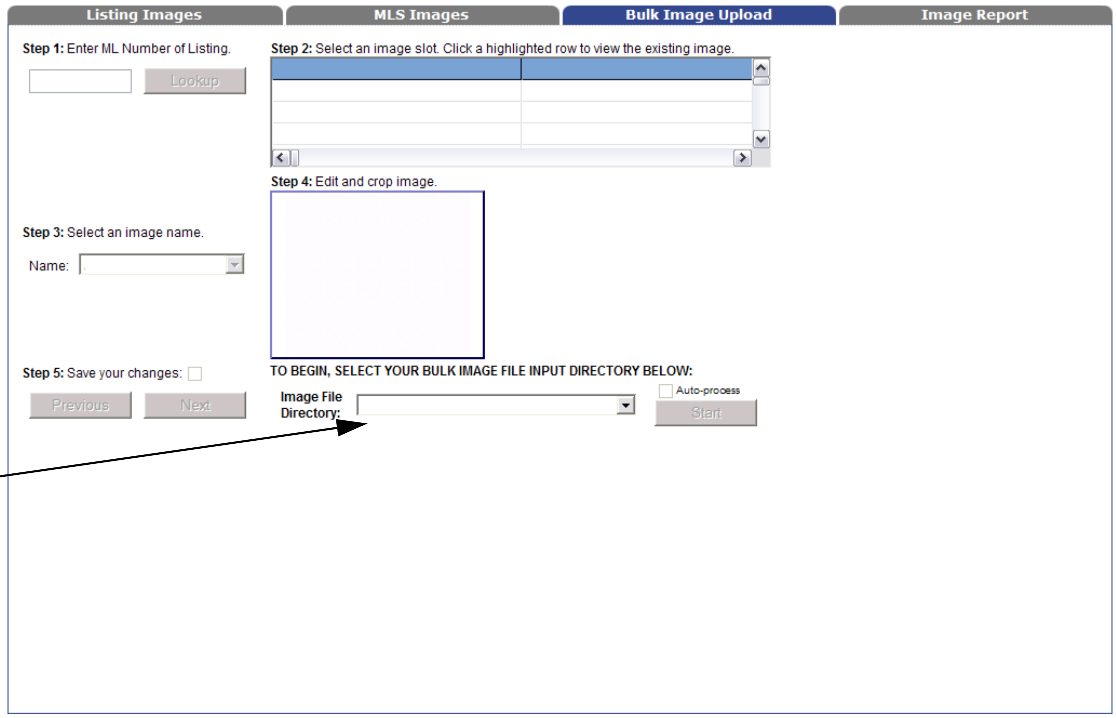
This tool lets you upload multiple images to multiple listings at one time. You should have a folder on your computer that contains all the image files you want to import to the server.

To access the Bulk Upload feature:

1. From the Tools page, click **Images** to expand the section, then click the **Bulk Image Upload** tab.

NOTE! *Active X controls must be installed for this option to work properly. You may see an ActiveX Install dialog box open with several options. Choose the option that matches your operating system and follow the on-screen instructions.*

The Bulk Image Upload page opens.



Click the drop-down list box to navigate to the images you want to upload.

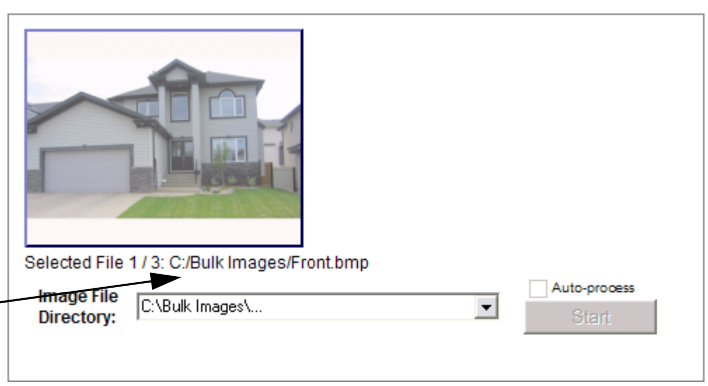
2. Click the **Image File Directory** drop-down list.

   The Select Input File Specification dialog box opens.

3. Navigate to where the images are saved on your computer, then select the ones you want to upload.
   - hold down the **CTRL** key to select multiple images.

4. Click **Open**.

   The **Image File Directory** field displays the file location, and a thumbnail view of the first image is displayed in the preview frame. The name of the image is displayed in the field adjacent to the **Lookup** button (Step 1 on the screen).



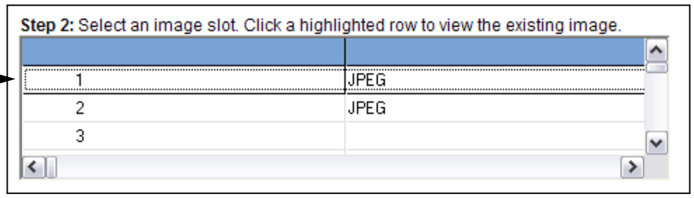
Look here to see the image file name and path.

5. Click the **Start** button to begin the import process.
   - select the **Auto process** check box to upload all images automatically.
6. In the **Enter ML Number of Listing** field (Step 1 on the screen), type the ML number of a property to which you want to add the images, then click **Lookup**.

   Note: You'll have to type over the name of the image, which is currently displayed here.

   Once the listing is found, the Address, Agent and Office information of the specified property is displayed.
7. The images for the specified property can now be reviewed using the slots.

This slot is highlighted. Click it again to open the property image.



   - click on an image slot (row) to highlight it.
   - click on the a highlighted row again to view the image.
8. Click the **Name** drop-down list to select an image name (Step 3), such as **Exterior Front**.
9. To edit or crop the image, right-click on the preview (Step 4).

   A shortcut menu is displayed with the following commands:
   - **Crop Image As Displayed** — if you've changed the image using the pan or zoom tools, choose this command to use the resulting image.
   - **Convert To Grayscale** — changes the image to grayscale.
   - **Enhance As Photograph** — sharpens the image detail and sets the color contrast to look more like a photograph.
   - **Make No Enhancements** — click this command to undo any of these image effects you may have applied. The image is returned to its original state.
   - **Enhance As Drawing** — changes the image to look like a drawing.
   - **Display Popup Image** — opens the full image in a separate window and displays it at 100%.
10. To change the size of the image, hold the right mouse button over the preview (Step 4) until the cursor changes to a four-headed arrow inside a square [], then:
    - move the mouse up to zoom in
    - move the mouse down to zoom out

TIP ... To undo any of the image effects, simply click on the Make No Enhancements command.

11. To pan the image from left to right or up and down, hold the right mouse button over the preview (Step 4) until the cursor changes to a four-headed arrow [], then:
    - move the mouse up and down or left and right to pan in that direction.
12. Click the **Save Your Changes** check box (Step 5), then click **Next**.

The image is uploaded into the property listing and the program advances to the next picture you uploaded.

13. Repeat steps #6-12 for each image you want to upload to the specified listing.
14. Once you've advanced through all the pictures, click the **Finish** button.

    A **Done** folder is created in the original folder where the images were stored on your computer. Inside are the images that were successfully uploaded.

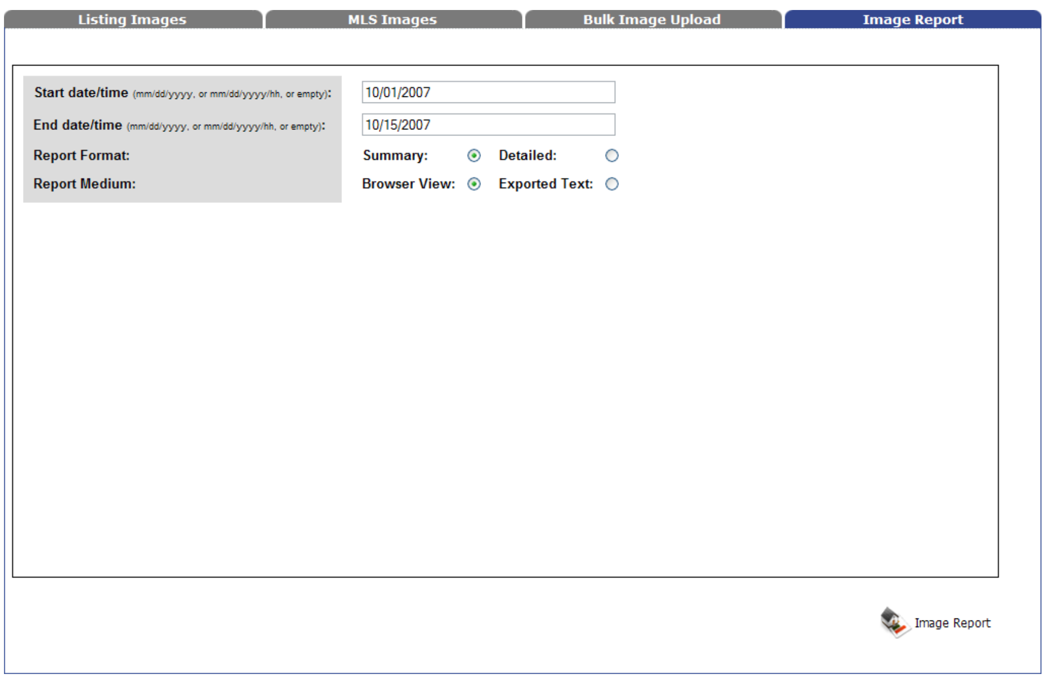
Image Report

You can generate either a detailed image report, or a summary report. View the report in your Browser or export the text.

To run an Image Report:

1. From the Tools page, click **Images**, then click the **Image Report** tab.

   The Image Report page opens.



2. Specify a date range for the report, using the suggested format; otherwise leave the fields blank:
   - **[Start/End] date/time** — enter the date and time (mm/dd/yyyy) or (mm/dd/yyyy/hh).
3. Select the **Report Format**:
   - **Summary** — gives an overview of image submittal by listing office code, login name, count and subtotal.
   - **Detailed** — lets you generate more detailed reports. A secondary **Subject** drop-down list becomes available. Select a specific image report from the list.

4. Select the **Report Medium**:
   - **Browser View** — displays the formatted report on the Image Report page of the application.
   - **Exported Text** — saves the report as a text (.txt) file that can be imported into another program, such as Excel.
5. Click the **Image Report** button.

Message of the Day

The Message of the Day enables you to read up on any new TEMPO 5 related news, as well as System, Broker, or Office news. Even thought the Message of the Day pops up after log-in, you may want to review the news later without having to log in again.

To view the Message of the Day:

1. From the Tools page, click **Message of the Day**, then click the **View the Message of the Day** tab.

   The Message of the Day page opens, displaying several tabs: **System**, **Broker** and **Office**.
2. Click the tab of the type of news you want to read.
3. Scroll down or use the header bar along the top right corner to navigate to other sections of the page.

   Note: Each header bar within the dialog box has links that represent a different news category. Click a link to read the text message contained in the selected news category.
4. Click **Print**.

   A standard Windows Print dialog box opens.
5. Select any additional print options (e.g., number of copies, destination printer, etc.) and click **OK** to print the report.
6. Click **Close**.

Editing Message of the Day

In order to edit the message of the day, you need to have sufficient administrative access. See your System Administrator for more information.

To edit the Message of the Day:

1. From the Tools page, click **Message of the Day**, then click the **Edit the Message of the Day** tab.

   The portion of the Message of the Day to which you have editing rights is displayed in edit mode.
2. Enter or edit the comments in the message box.
3. Click the **Spell Check** button to search for any typos or spelling errors.
4. Click **Preview** to see how the message will look when saved and posted.
5. Click **Save**.

   You are returned to the Tools page.

Editing Terms of Use

The Terms of Use pop-up window is displayed when a user first logs in to TEMPO 5. These terms must be accepted by selecting an option button before the user can use TEMPO 5.

To edit the Terms of Use:

1. From the Tools page, click **Message of the Day**, then click the **Edit the Terms of Use** tab.

   The Terms of Use message box is displayed.
2. Enter the message using basic HTML commands to format it.
3. Click **Preview** to see how the message will look when saved and posted.
4. Click **Save**.

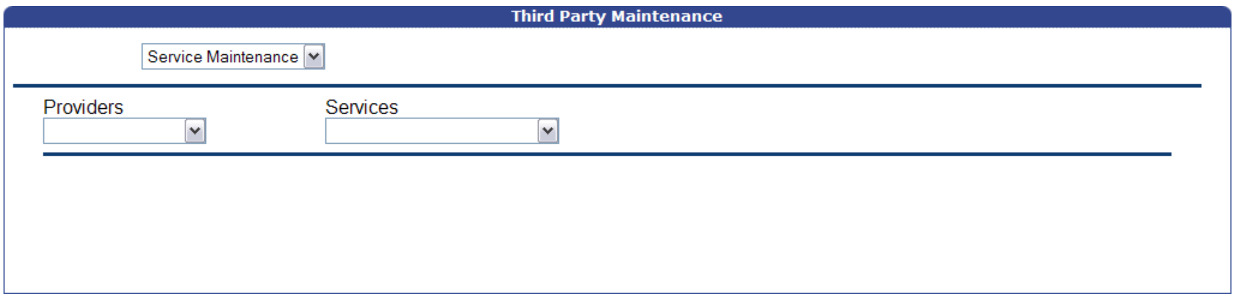
Third Party Maintenance

The Third Party Maintenance area lets you manage the third-party vendors and services that are currently available within TEMPO 5. You can add new providers (e.g. Google), specify an icon to be used to represent the service within TEMPO 5, set up logins and deny access.

To access third party maintenance:

1. From the Tools page sidebar, click the **Third Party Maintenance** link.

   The Third Party Maintenance page opens.



2. Click the drop-down list and select one of the following:
   - **Service Maintenance** — add and set up a third-party service provider, choosing from a list of available services. Assign a SmartLink icon and add the URL, if required.
   - **Access Exclusions** — maintain a list of Excluded User Classes to each of the available third-party providers. You can also delete a service provider from the list.
   - **Third Party Logins** — assign public and private IDs for each available service.
3. Click **OK**.

System Tools

The System Tools include MLS-related functions that let administrators manage the Home page links, generate database transaction reports, track field change history and add or edit field-specific Help instructions.

NOTE! *Not everyone will have access to this area.*

Search IIS Logs

Enter search criteria to retrieve the server list, based on Client IP address, date, start and end times.

Copyright Configuration

Add or update copyright text, then preview it for accuracy.

Fax Attachment Status Manager

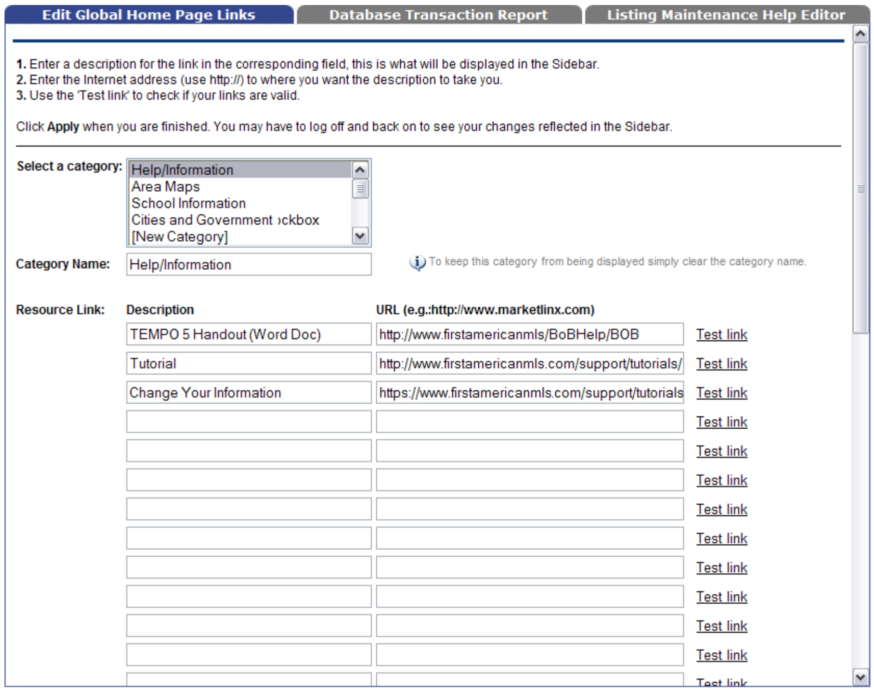
Enter the search criteria (Public and Transaction IDs) to retrieve the results as to the fax attachment status.

Edit Global Home Page Links

Use this system tool to add or edit the links found in My Sidebar. The changes take effect globally.

To add or edit the links in My Sidebar:

1. From the Tools page, click **System Tools**, then click the **Edit Global Home Page Links** tab.



2. In the **Select a category** list box, highlight:
   - an existing category to see a list of resource links currently available.
   - **[New Category]** to add a new resource link.
3. In the **Category Name** field, type a new name or edit the existing one.
4. In the **Resource Link** area, add or edit links, including a **Description** and the **URL**.
5. Click the **Test Link** link to verify that the URL is valid.
6. Scroll down and click the **Apply** button.

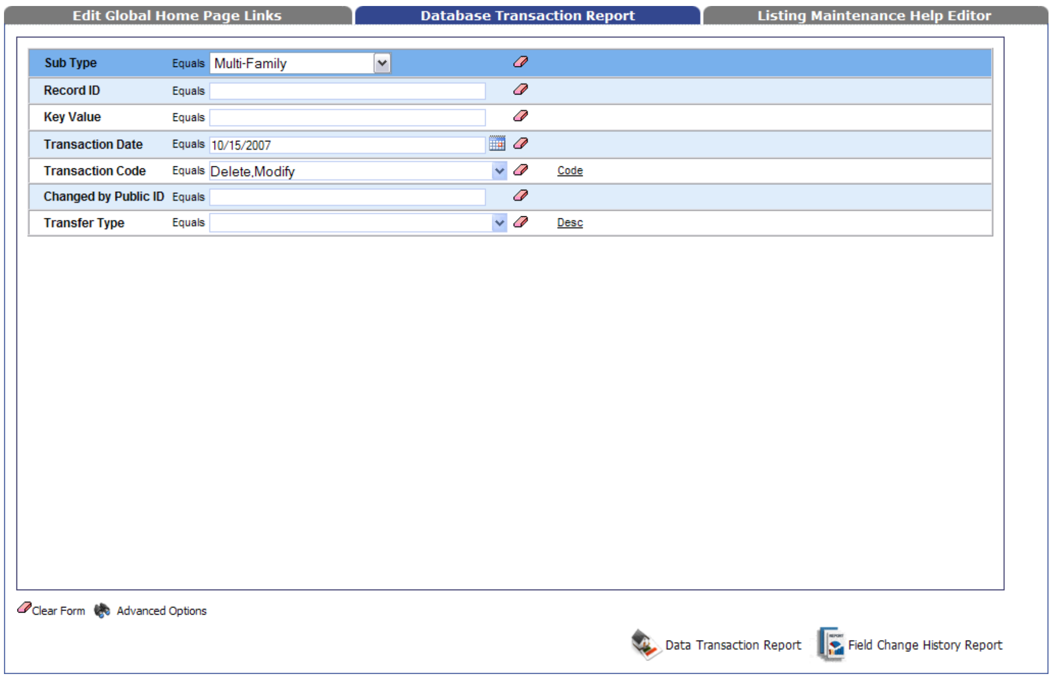
   The changes will be made globally.

Database Transaction Report

Us this system tool to search for database transactions, such as list and sell transfers, then generate either a Database Transaction report or a Field Change History Report.

To generate a Database Transaction report:

1. From the Tools page, click **System Tools**, then click the **Database Transaction Report** tab.



2. Enter the search criteria and perform a search. See *"Using the Search Criteria Page" on page 68*.
3. Click the **Data Transaction Report** button.

   A message box appears, displaying the number of matching records and asking if you want to execute the search.
4. Click **OK** to continue.

   The Database Transaction Report is displayed.
5. Click **Print**.

To generate a Field Change History report:

1. From the **Database Transaction Report** tab, enter the search criteria and perform a search. See *"Using the Search Criteria Page" on page 68*.
2. Click the **Field Change History Report** button.

   A message box appears, displaying the number of matching records and asking if you want to execute the search.
3. Click **OK** to continue.

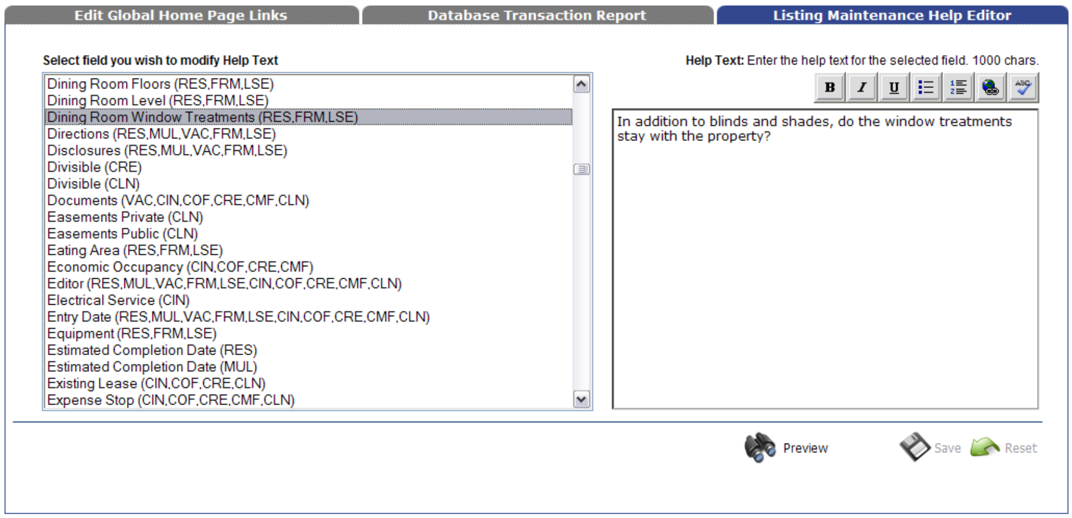
   The Field Change History Report is displayed.
4. Click **Print**.

Listing Maintenance Help Editor

Use this system tool to specify the field-specific help text that is available on Search Criteria forms. Text can provide guidance for completing the field correctly.

To add or modify Help text at the field level:

1. From the Tools page, click **System Tools**, then click the **Listing Maintenance Help Editor** tab.



2. Highlight a field in the list.

   Any existing instructions will appear in the **Help Text** box to the right.

3. Add or modify the text (up to 1,000 characters).

   - use the toolbar buttons to apply attributes to the text, such as bolding.

4. Click the **Preview** button to see what the help text will look like.
5. Click **Save**.

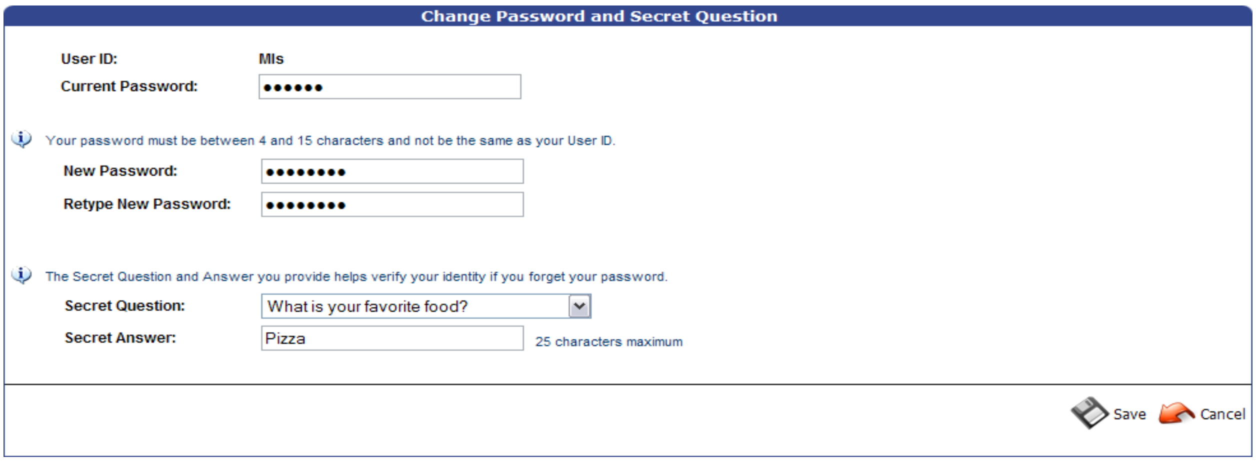
Changing Your Password and Secret Question

If enabled by your MLS administrator, TEMPO 5 provides a feature that lets you change your password and/or secret question any time you want.

To change your password or secret question:

1. Click **My Tools**, and then click **Change Password**.

   The Change Password and Secret Question page opens.



2. To make any changes to the settings on this page, you must type your **Current Password**.
3. Enter your **New Password** and then retype it for confirmation.

   Note: Passwords are case sensitive.
4. To change the secret question and answer that you can use to retrieve your password should you ever forget it, click the **Secret Question** drop-down list and select a question. See *"Signing In and Out" on page 4*.
5. Enter your **Secret Answer** (maximum of 25 characters).

NOTE! *Try to choose a secret answer that no one else will know or be able to guess easily. For example, if your last name is the same as your mother's maiden name, that would NOT be a good secret question to select.*

Click **Save**.

IDX Configuration and Member Permissions

The IDX Configuration and IDX Member Permissions dialogs are staff-only functions that allow users (who have sufficient access rights) to configure IDX profiles and edit IDX permissions for members.

To access the IDX Configuration page:

1. From the main menu, click **My Tools > IDX Configuration**.

   Note: You must have proper IDX configuration permissions detected for this dialog to be displayed.

To access IDX Member Permissions:

1. From the main menu, click **My Tools > IDX Member Permissions**.

   The Roster Search pop-up window opens.
2. Search for a member by using the available fields. For example, enter the agent's name or office code (in whole or in part), then click **Search**.

   A list of member information appears, including **Public ID #**, **Name**, **Office** and **Key #**.
3. Click on the blue hyperlink for a member.

   The Member Information pop-up window opens, letting you view the member's Agent, Broker and Permissions information.
4. Click the **Edit** button to make changes to this information.

Member Info

Member Search
Office Search
MLS News

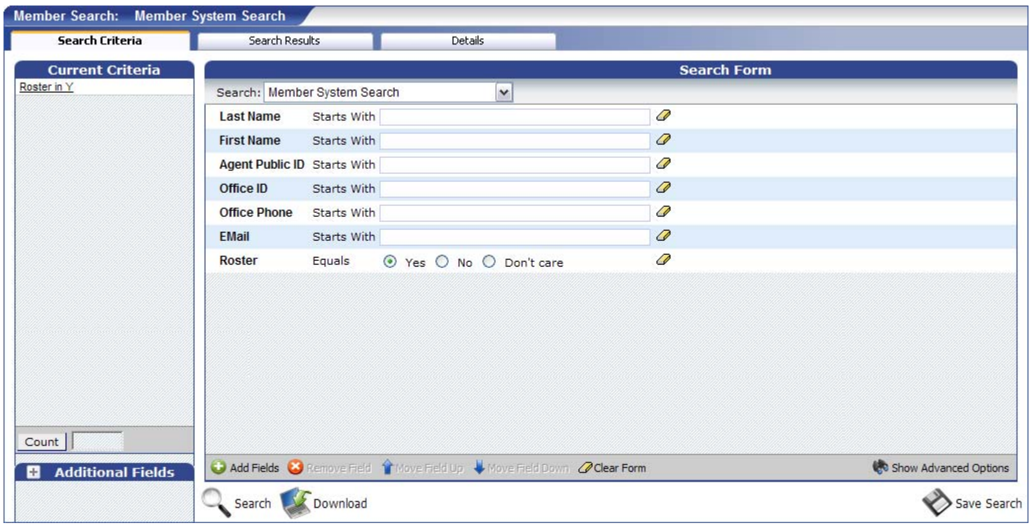
Member Search

Use the **Member Info** area to search for members using their name, Agent Public ID, Office ID or Email address. Once selected, the search results can be exported for use in another application, such as Excel; or printed as one of several types of report.

To search for one or more members:

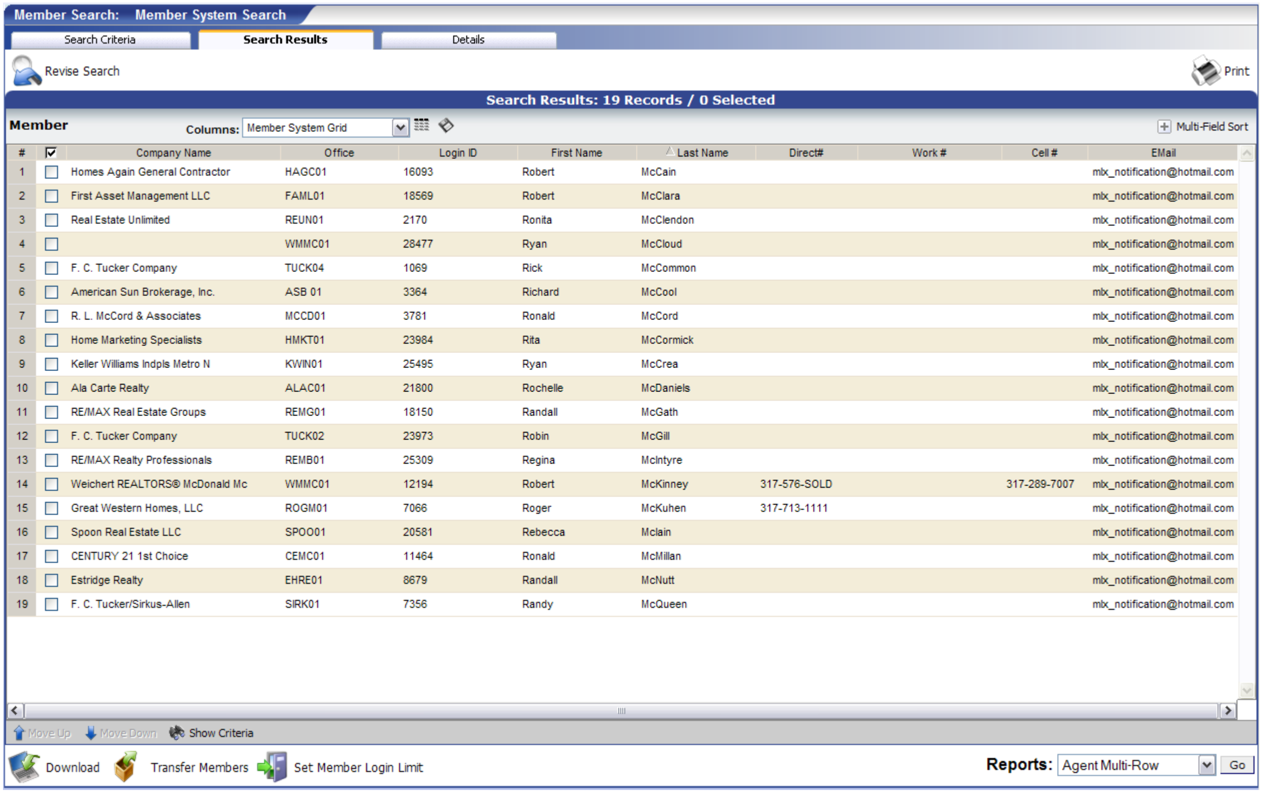
1. From the main menu, click **Member Info** > **Member Search**.

   The Member Search Criteria page opens.



2. Complete the fields on the Search form.
   - use the footer bar controls to add, remove, move fields on the page. See *"Using the Search Criteria Page" on page 68*.
3. Click the **Count** button in the sidebar to see how many records match your criteria.
4. Click one of the action buttons to perform a task:
   - **Download** — opens the Data Export page so you can download the information. See *"Exporting Data from TEMPO 5" on page 330*.
   - **Save Search** — opens the Search Settings page so that you can save the search for re-use. See *"Saving a Search" on page 73*.
5. Click the **Search** button or **Search Results** tab.

The Search Results page opens.



6. From the Search Results page, select one or more member records, then:
   - use the footer bar controls to re-order a selected record in the list or to show the search criteria.
   - click the **Multi-Field Sort** button to apply a filter to the data. See *"Viewing, Sorting and Filtering" on page 22*.
   - click the **Columns** drop-down list to select another format for the data. See *"Managing Column Reports" on page 318*.
   - click the **Save Grid** icon to save any changes you made to the column grid.
7. Click the action buttons to perform more tasks:
   - **Revise Search** — takes you back to the Search Criteria page so you can modify your search criteria.
   - **Print** — lets you preview and print one or more member reports. In addition, you have the option to save the document in a Portable Document Format (PDF). See *"Saving a Report as a PDF Document" on page 269*.
   - **Download** — opens the Data Export page so you can export the information.
     See *"Exporting Member or Office System Data" on page 334*.
   - **Transfer Members** — lets you transfer one or more member records to a different office.
   - **Set Member Login Limit** — lets you specify the number of logins allowed for a selected member, including unlimited logins.

8. To choose the type of report you want to generate now, click the **Reports** drop-down list, then click the **Go** button; or click the **Details** tab.
9. Proceed to the *"Viewing Member Details"* section.

Viewing Member Details

From the Search Details page you can choose from several different report formats, then scroll through multiple reports for on-screen viewing. In addition, you can preview what the report will look like when printed, then send it to the printer or save it as a PDF file.

To view a member report:

1. From the **Member Search Results** page, click the **Details** tab.
2. If you want to change the type of member report from the Details page, click the **Reports** drop-down list and choose one of the available report types, for example **Member Details**.
3. To view multiple reports, click the **Previous** [] and **Next** [] arrow buttons at the top of the page to scroll through the different member records.
4. Click the **Print Report** button to select which reports (or pages of) to preview, print or save as PDF. See *"Printing" on page 265*.

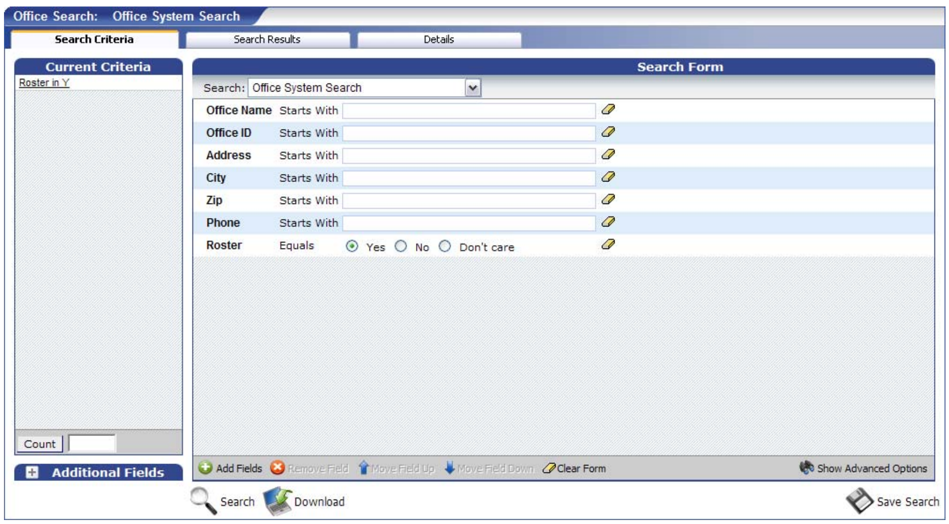
Office Search

Use the **Office Search** feature to search for offices using the Office Name, Office ID, etc. Once selected, the search results can be exported for use in another application, such as Excel; or printed as one of several types of report.

To search for one or more offices:

1. From the main menu, click **Member Info** > **Office Search**.

   The Office Search Criteria page opens.



2. Complete the fields on the Search form.
   - use the footer bar controls to add, remove, move fields on the page. See *"Using the Search Criteria Page" on page 68*.
3. Click the **Count** button in the sidebar to see how many records match your criteria. If there are too many, revise the search criteria.
4. Click one of the action buttons to perform a task:
   - **Search** — displays the Search Results page with all matching records. Proceed to step #5.
   - **Download** — opens the Data Export page so you can export the information. See *"Exporting Member or Office System Data" on page 334*.
   - **Save Search** — opens the Search Settings page so that you can save the search for re-use. See *"Saving a Search" on page 73*.
5. From the Search results page, select one or more office records, then:
   - use the footer bar controls to re-order a selected record in the list or to show the search criteria.
   - click the **Multi-Field Sort** button to apply a filter to the data. See *"Viewing, Sorting and Filtering" on page 22*.

- click the **Columns** drop-down list to select another format for the data. See *"Managing Column Reports" on page 318*.
- click the **Save Grid** icon to save any changes you made to the column grid.

6. Click the action buttons to perform more tasks:
   - **Revise Search** — takes you back to the Search Criteria page so you can modify your search criteria.
   - **Print** — lets you preview and print one or more office reports. In addition, you have the option to save the document in a Portable Document Format (PDF). See *"Saving a Report as a PDF Document" on page 269*.
   - **Download** — opens the Data Export page so you can export the information.
     See *"Exporting Member or Office System Data" on page 334*.
7. To choose the type of report you want to generate now, click the **Reports** drop-down list, then click the **Go** button; or click the **Details** tab.
8. Proceed to the *"Viewing Office Details"* section.

Viewing Office Details

From the Search Details page you can choose from several different report formats, then scroll through multiple reports for on-screen viewing. In addition, you can preview what the report will look like when printed, then send it to the printer or save it as a PDF file.

To view an office report:

1. From the Office Search Results page, click the **Details** tab.
2. If you want to change the type of office report from the Details page, click the **Reports** drop-down list and choose one of the available report types, for example **Office Roster**.
3. To view multiple reports, click the **Previous** [] and **Next** [] arrow buttons at the top of the page to scroll through the different office records.
4. Click the **Print Report** button to select which reports (or pages of) to preview, print or save as PDF. See *"Printing" on page 265*.

MLS News

Although you can read the MLS, Broker and Office news on the Home page, you may want to print it. Use the **MLS News** page under **Member Info** to print the information. See *"Using the MLS, Broker and Office Tabs" on page 12*.

To print MLS, Broker or Office news:

1. From the main menu, click **Member Info** > **MLS News**.

   The Message of the Day opens in a pop-up window.
2. Click the tab of the type of news you want to see: **System**, **Broker** or **Office**.
3. Click the **Print** button.

   A standard Windows Print dialog box opens. See *"Printing" on page 265*.
4. Choose all your print options, and click **OK**.
5. Click **Close** to exit the Message of the Day pop-up window.

Column Manager

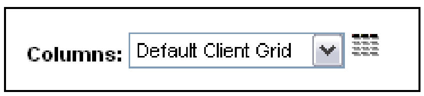
Managing Column Reports

The Column Manager is available from most Search Results pages. It allows you to apply a different Column report layout to your search results. There are two types of column reports:

- **System** — System reports are pre-defined and come loaded with the program. They cannot be modified directly; you must first make a copy, then modify and rename the copy.
- **Personal** — Personal reports are created by you and, therefore, can be edited and deleted by you.

To apply a different column report layout:

- From the Search Results page, click the **Columns** drop-down list and select the name of a report.

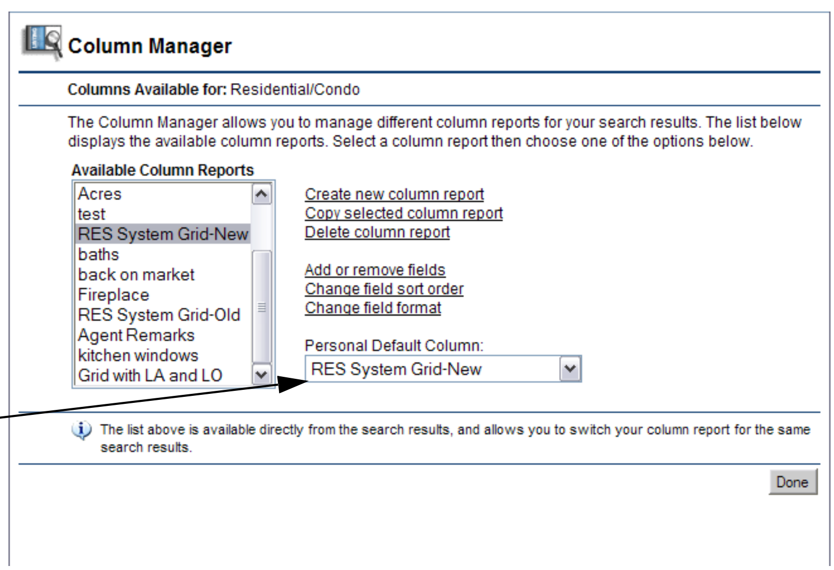


The Search Results are displayed in the new column layout.

To access the Column Manager:

- From a Search Results page, click the [▦] icon adjacent to the **Columns** drop-down list at the top of the page.

  The Column Manager pop-up window opens:



To select a default column report, click the drop-down list and choose a report to apply automatically to search results.

To set a personal default column report:

- From the Column Manager, click the **Personal Default Column** drop-down list and choose the name of a report you like.

  It will be applied automatically to your Search Results pages.

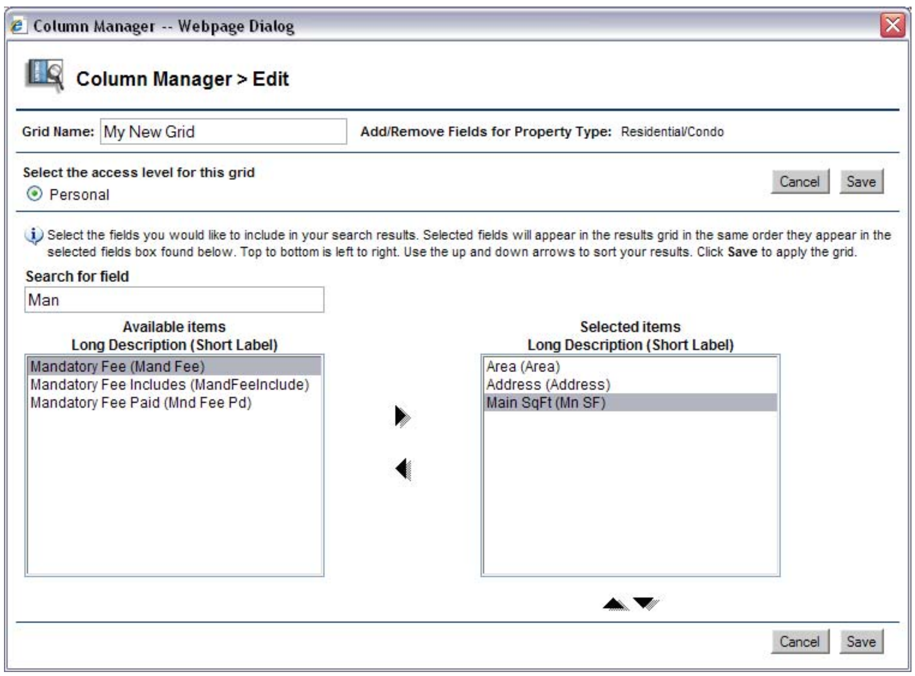
Creating a New Column Report

TEMPO 5 allows you to create custom column layouts (or "list views") for the Search Results list that will let you present your data any way you want.
The Column Manager feature is particularly useful for preparing custom export formats and column reports for search results. See *"Exporting Data from TEMPO 5" on page 330*.

To create a new column layout:

1. From the Column Manager pop-up window, click the **Create new column report** link.

   The Column Manager > Edit page opens.



2. Type a name for the new column report in the **Grid Name** field.
3. Select the access level option:
   - **Personal** — available only to you.
   - **Office** — available to all agents in your office, as read-only.
   - **System** — available to the entire MLS, as read-only.
4. Build the column layout by selecting the field(s) you want from the **Available items** list.
   - enter the first few letters of what you want to search for in the **Search for field** text box. The list shortens to display the matching items.
   - highlight a field in the list, then click the right [▶] arrow to add it to the **Selected items** list. Hold down the ***CTRL*** or ***SHIFT*** key to select multiple items.

- to remove a field, highlight it in the **Selected items** list, then click the left [◀] arrow to move it back to the **Available items** list.
- to change the order of the selected fields, highlight a field in the **Selected items** list, then click the up [▲] or down [▼] arrow to move it to a new position.

Note: The top field in the list will appear as the far left column in the grid; the bottom field in the list will appear as the far right column.

5. Click **Save**.

The new column report name appears in the **Available Column Reports** list on the Column Manager pop-up window. The remaining links become available.

Copying a Selected Column Report

NOTE! System reports are pre-defined and come pre-loaded with the application. You cannot modify these. Instead, you can take a copy; modify it then rename it.

To copy an existing Column report layout:

1. From the Column Manager pop-up window, highlight a report in the **Available Column Reports** list.
2. Click the **Copy selected column report** link.

   The Column Manager > Edit pop-up window opens.

*NOTE! The **Grid Name** field shows the name "Copy of [column report name]".*

3. Type a name (or accept 'Copy of') for the new column report in the **Grid Name** field.
4. Build the column layout by selecting the field(s) you want from the **Available items** list.
   - enter the first few letters of what you want to search for in the **Search for field** text box. The list shortens to display the matching items.
   - highlight a field in the list, then click the right [▶] arrow to add it to the **Selected items** list. Hold down the ***CTRL*** or ***SHIFT*** key to select multiple items.
   - to remove a field, highlight it in the **Selected items** list, then click the left [◀] arrow to move it back to the **Available items** list.
   - to change the order of the selected fields, highlight a field in the **Selected items** list, then click the up [▲] or down [▼] arrow to move it to a new position.
5. Click **Save**.

   The copied report appears in the **Available Column Reports** list on the Column Manager pop-up window. The remaining links become available.
6. To further customize the report, click the **Add or remove fields**, **Change field sort order** or **Change field format** links. See *"Editing an Existing Column Report" on page 322*.

Editing an Existing Column Report

The Column Manager lets you quickly modify your own (Personal) Column report layouts. You can add or remove fields, change the field sort order on Search Results pages or change a field format.

NOTE! *You can't modify a Column report created at the System level. Instead, you must make a copy of the report, then rename it. For example, copy the **Default Client Grid** report that came pre-loaded with TEMPO 5 and either accept the name '**Copy of Default Client Grid**' or name it something else.*

To add or remove fields from a selected Column report:

1. From the Column Manager pop-up window, highlight a Personal Column report in the **Available Column Reports** list.
2. Click the **Add or remove fields** link.

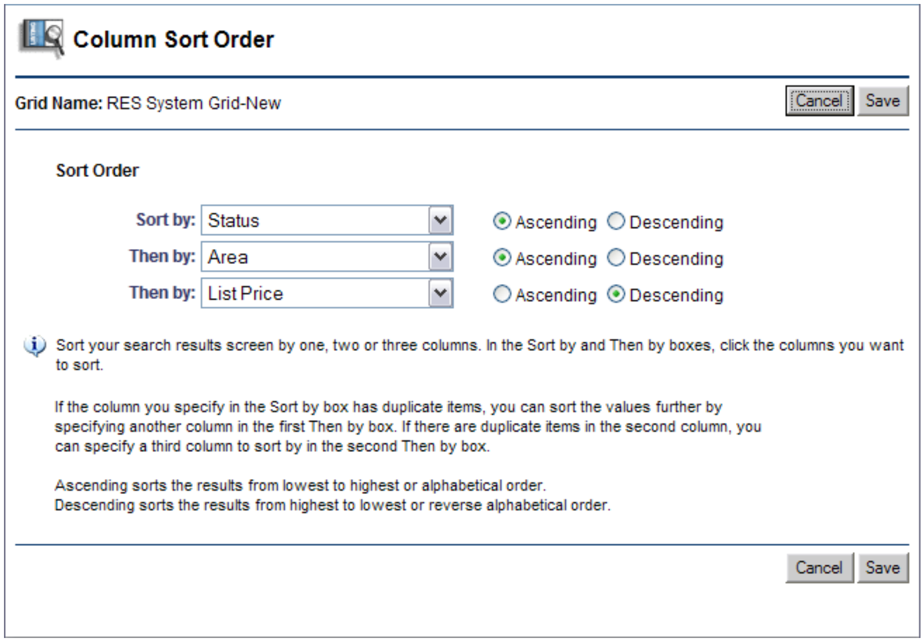
   The Column Manager > Edit pop-up window opens.
3. To add a field, highlight it in the **Available items** list, then click the right [▶] arrow to add it to the **Selected items** list.
   - use the **Search for field** to help you locate the field you want to add.
   - hold down the ***CTRL*** or ***SHIFT*** key to select multiple items.
4. To remove a field, highlight it in the **Selected items** list, then click the left [◀] arrow to move it back to the **Available items** list.
   - hold down the ***CTRL*** or ***SHIFT*** key to select multiple items.
5. To change the order of the selected fields, highlight a field in the **Selected items** list, then click the up [▲] or down [▼] arrow to move it to a new position.

   Note: The top field in the list will appear as the far left column in the grid; the bottom field in the list will appear as the far right column.
6. Click **Save**.

To change the field sort order in a selected Column report:

1. Highlight a Personal Column report in the **Available Column Reports** list.
2. Click the **Change field sort order** link.

The Column Sort Order pop-up window opens.



3. Click the **Sort by** drop-down list and select one of the column fields by which you want to sort.
4. Click either the **Ascending** or **Descending** option button to the right of the drop-down list.

   *Note: If the column (selected in the **Sort by** list) results in duplicate values, you can sort the values further by using the **Then by** lists.*
5. Click the first **Then by** drop-down list and specify another column name.
6. Click either the **Ascending** or **Descending** option button.
7. If needed, specify another column name in the second **Then by** drop-down list.
8. Click either the **Ascending** or **Descending** option button.
9. Click **Save**.

   A message box appears confirming your changes.
10. Click **Save**.

Sort Order Example:

Here is an example of what a list would look like if it were sorted first by **Status**, then by **Area**, and then by **List Price** (all ascending):

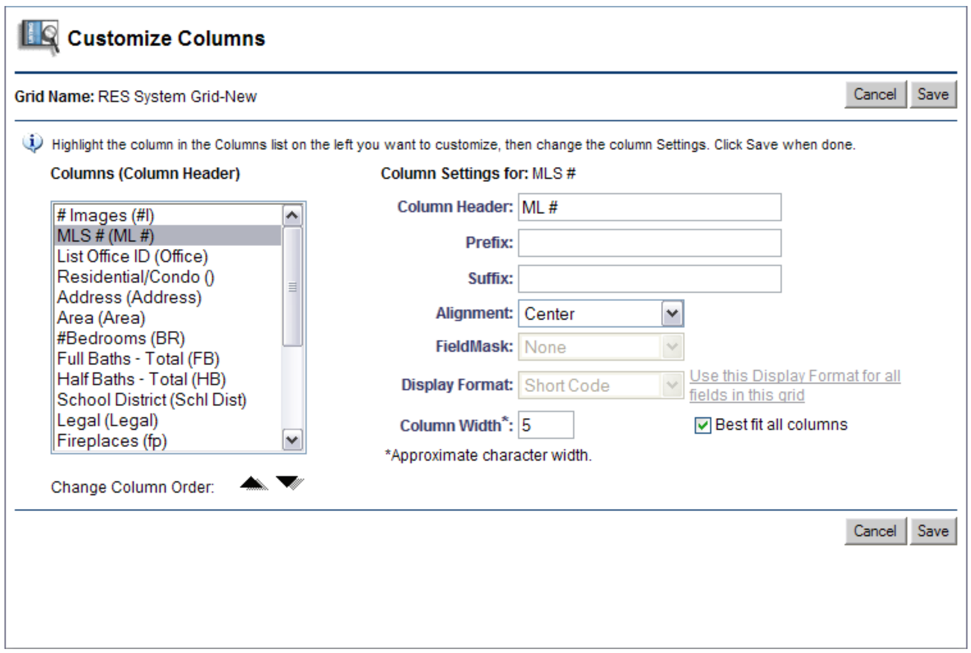
Status	Area	List Price
Active	100	$100,000
Active	100	$200,000
Active	200	$100,000
Active	200	$200,000
Closed	100	$100,000
Closed	100	$200,000

Closed	200	$100,000
Closed	200	$200,000

To change the field format:

1. From the Column Manager pop-up window, highlight a Personal Column report in the **Available Column Reports** list.
2. Click the **Change field format** link.

   The Customize Columns pop-up window opens.



3. Highlight the name of the column header you want to customize in the **Columns** list.
   - use the up [▲] or down [▼] arrow to change the column order in the list.
4. Change the selected column's settings:
   - **Column Header** — type the text of the column's header labels you want to appear.
   - **Prefix/Suffix** — type some pre-defined text you want to appear before or after the field value within a column. For example, you may want the **Square Footage** column to always display "Sq Ft" after the value.
   - **Alignment** — specify the column's field values to line up to the **Left**, **Right**, or **Center**.
   - **Field Mask** — click the drop-down list and choose a pre-defined formatting option to apply to the selected column. This setting is only available for numeric fields and lets you control how the value is presented. For example, you can determine how many decimal places to show, if you want to use comma separators, etc.

- **Display Format** — click the drop-down list and choose a display format for the selected column. This is applicable to the fields that have two ways of displaying data; such as **Short Code** or **Long Description**.
- **Use this Display Format for all fields in this grid** — select this link to apply the same format to all columns.

NOTE! *Unless you are preparing a column layout for printing customer reports, the Short Code is usually the best option because it lets you display more columns of information on-screen.*

5. Specify the **Column Width** expressed as a number of characters.
6. Select the **Best fit all columns** check box if you want the program to automatically optimize the column fit for the page. This means that all of the columns dynamically resize so that they accommodate, but are not wider than, the maximum width of their contents.

NOTE! *Clear the **Best fit all columns** check box to turn off this feature.*

7. Click **Save**.

   A message box appears confirming your changes.
8. Click **OK**.

Deleting a Column Report

You can delete Personal Column reports only. System reports or Office/Board reports for which you do not have administration rights, cannot be removed.

To delete an existing Personal column report:

1. From the Column Manager pop-up window, highlight a Personal Column report in the **Available Column Reports** list.
2. Click **Delete column report**.

   A message box appears prompting you to confirm the deletion.
3. Click **OK**.

Setting a Personal Default Column Report

You can specify the name of a Column report to be applied automatically (by default) to your Search Results lists.

To specify a default Column report layout:

- From the Column Manager pop-up window, click the **Personal Default Column** drop-down list and select the name of a report you want assigned as the default.

  Your Search results are displayed in the Column report layout specified.

Import/Export

Importing Client Information

TEMPO 5 has a built-in import feature that enables you to import client information from other sources, such as Microsoft Outlook or Top Producer®.

Client information is also added automatically whenever a prospect electronically inquires about a listing on your Agent Web Site. See *"Client Gateway" on page 40*.

To import client information into TEMPO 5:

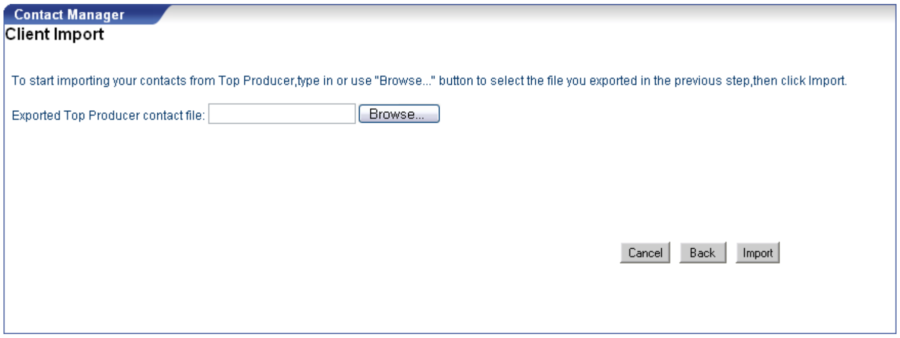
1. From the Contact Manager page, select the **Import** button.

   The Client Import page opens.

2. In the **Data Format** section, select the option button that describes the application (and version) from which you want to import client information:
   - **Import Microsoft Outlook 2000 or later**
   - **Import Top Producer 6.0 or 6i Contacts**
   - **Import Top Producer 7i Contacts**
3. Select what you want TEMPO 5 to do if the program already contains a record with the same name as one that is being imported:
   - **Keep the client record** — the new contact record will not be imported.
   - **Overwrite the client record with the one being imported** — existing client information in the TEMPO 5 database will be replaced with the imported client information.
   - **Add a new client record** (resulting in duplicate records) — both the existing and imported client records are preserved; however, this may result in duplicate client records.
4. Click **Next**.

   The Client Import page opens with on-screen instructions for the application you chose in step #2.
5. If you are importing from:
   - Microsoft Outlook, the records from the Contacts folder in Outlook's Personal Folders will be imported. Go to step 6.

- Top Producer, follow the on-screen instructions to export your Top Producer contacts to a text file (.txt or .csv). Once the export file has been created and saved, click **Next** to open the last page of the Client Import wizard.



  - Click **Browse** to navigate to where you saved the Top Producer export file, highlight it and click **Open**.

6. Click **Import**.

   A message dialog appears telling you the contacts have been imported successfully.

7. Click **OK**.

Exporting Data from TEMPO 5

TEMPO 5 lets you export information and images for use in other areas of the program, or in other applications, such as Microsoft® Excel®. You can export:

- contact records
- listing data
- hotsheet data
- member and office system data

A file compression option is available to reduce the file size for faster export time. If you choose this option, the export file will be a zipped (.zip) file.

Exporting Contact Records

Choose some or all of your contact records to export. To export some of your records, select them from the Contact Manager list before you click **Export**.

To export all client records, either select all by clicking on the check box column header, or leave them all unselected. The system assumes you mean to select them all and will have the correct option button chosen accordingly.

To export client data from Contact Manager:

1. From the main menu, click **Prospects > Contact Manager**.
2. From the Contact Manager page, select the records to export from the list.
3. Click the **Export** button.

   The Client Data Export page opens.

   *Note: In the **Select Records to Export** section, the correct option button will be selected.*

4. Click the **Data Export Format** drop-down list and choose an option:
   - **Comma delimited** — values in the text file will be separated by commas.

- **Tab delimited** — values will be separated by tabs.

5. In the **Export Options** section, select the **Compress file** check box if you are performing a large export (more than 100 records) and want to decrease the size of the file and the time it will take to download.
6. Click **Next**.

   The next page of the wizard opens.

7. Click the **Select Export Grid Format** drop-down list and choose one of the grid formats. These formats specify the fields to be exported, and the order in the which they are exported.
8. Select the **Include Column Headers?** check box to include the column headers (name of the column, such as Name) as the first row in the exported file. This helps you identify the data in each of the columns.
9. Click **Next**.

   A File Download dialog box opens.
10. Click **Save**.
11. Use the Save As dialog box to navigate to a convenient location on your computer to save the file.

    Note: The file is automatically named "clients_[current date]_[system number].txt", or .zip if you chose compression. You can change this name by typing a new one in the ***File Name*** *field of the Save As dialog box.*
12. Click **Save** again to complete the process.

    The Download complete dialog opens.
13. Click **Close**.
14. Click **Back** to return to the Contact Manager page.

Exporting Listings Data

Using TEMPO 5, you can quickly and easily export listing data in a format that can be opened by another application, such as Microsoft® Excel®.

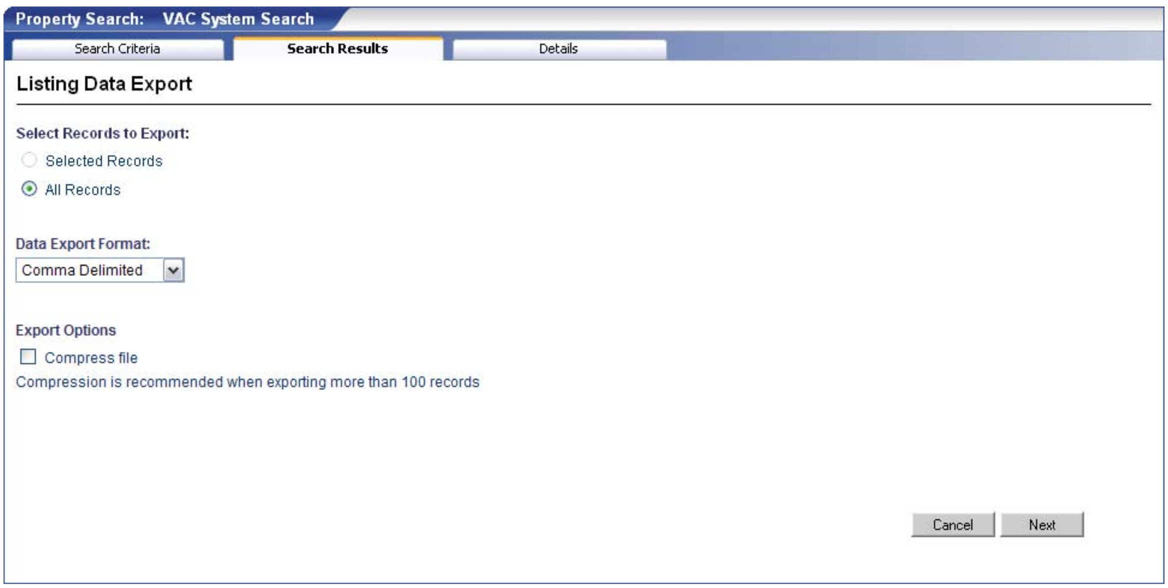
To export listings data:

1. From a Search Results page, select one or more listings to export from the list.

   Note: To export all records, do not select any of them.

2. Click the **Download** button (which is also available on the Search Criteria page).

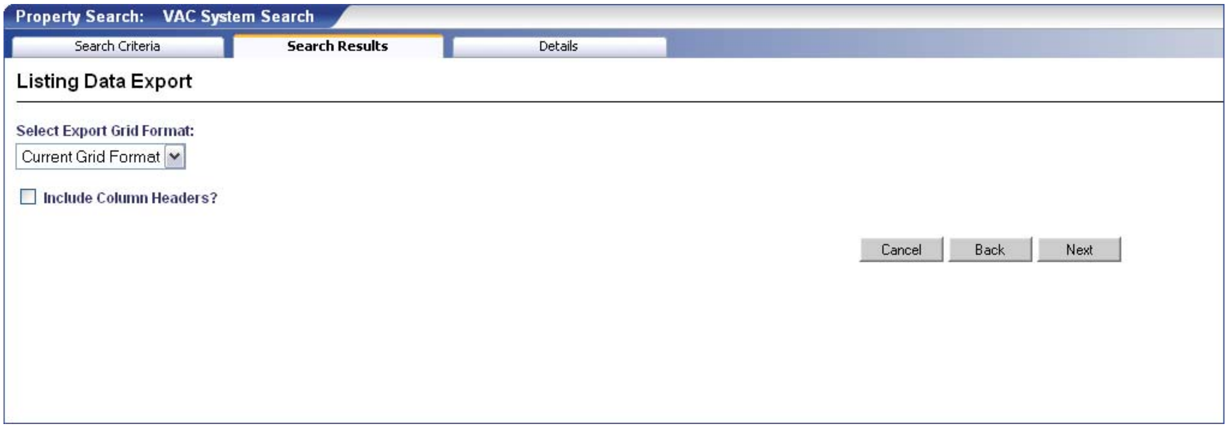
   The Listing Data Export page opens.



3. In the **Select Records to Export** section, the appropriate option will be selected, based on the previous page (step #1):
   - **Selected Records**
   - **All Records**
4. Click the **Data Export Format** drop-down list and choose one of the options:
   - **Comma Delimited** — values in the text file will be separated by commas.
   - **Tab Delimited** — values in the text file will be separated by the Tab character.
   - **Pocket Real Estate3** — text file will be exported directly to Pocket Real Estate for use on a specific personal handheld device (PDA).
5. In the **Export Options** section, select the **Compress file** check box if you are performing a large export (more than 100 records) and want to decrease the size of the file and the time it will take to download.
6. Click **Next**.

   Note: If you are exporting to Pocket Real Estate, the export process begins immediately. Otherwise, the wizard continues, as below.

The next page of the wizard opens.



7. Click the **Select Export Grid Format** drop-down list and choose one of the grid formats. These formats specify the fields to be exported, and the order in which they are exported.

NOTE! *Before exporting client data, you may want to use the Column Manager to create a special Grid format (i.e., column layout) that contains additional and/or different Client Record fields. This will allow you to create an export file in the precise format required. See* *"Column Manager" on page 317*.

8. Select the **Include Column Headers?** check box to include the column headers as the first row in the exported file.
9. Click **Next**.

   A File Download dialog box opens.
10. Click **Save**.
11. Use the Save As dialog box to navigate to a convenient location on your computer to save the file.

    Note: The file is automatically named "listings_[current date]_[system number].txt", or .zip if you chose compression. You can change this name by typing a new one in the ***File Name*** *field of the Save As dialog box.*
12. Click **Save** again to complete the process.

    The Download complete dialog opens.
13. Click **Close**.
14. Click **Back** to return to the Search Results page.

Exporting Hotsheet Data

Using TEMPO 5, you can quickly and easily export hotsheet data in a format that can be opened by another application, such as Microsoft® Excel®.

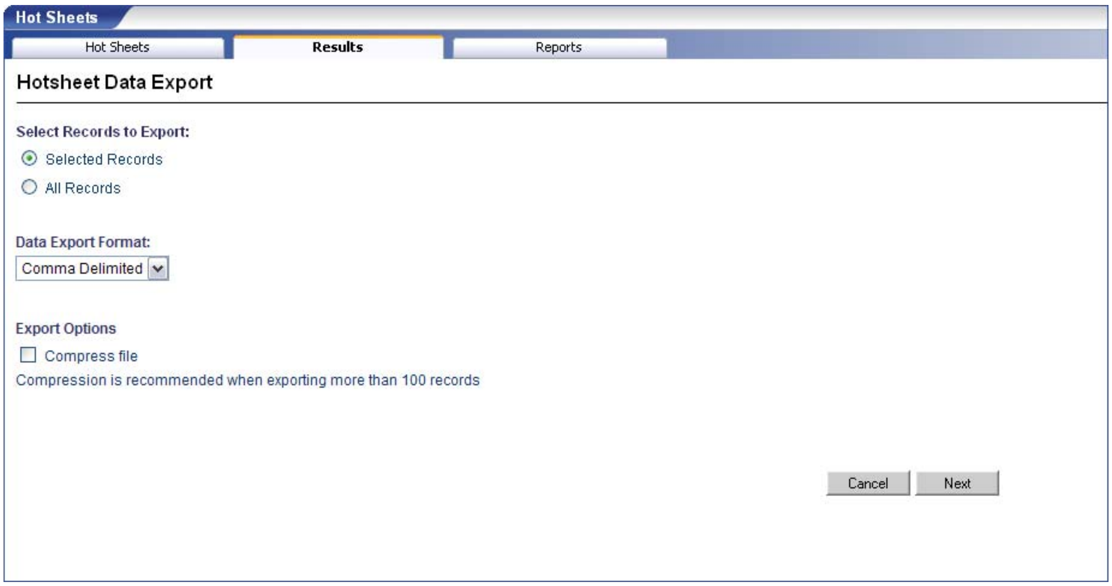
To export hotsheet data:

1. From the Hot Sheets Results page, select one or more hotsheets to export from the list.

   Note: To export all records, do not select any of them.

2. Click the **Download** button.

   The Hotsheet Data Export page opens.



3. The rest of the procedure is the same as exporting contact data. See *"Exporting Contact Records" on page 330*.

   *Note: The file is automatically named "hotsheet_[current date]_[system number].txt", or .zip if you chose compression. You can change this name by typing a new one in the **File Name** field of the Save As dialog box.*

Exporting Member or Office System Data

TEMPO 5 gives you the ability to export member system and office system data.

To export member or office system data:

1. From the main menu, click **Member Info**, then **Member Search** or **Office Search**.
2. The rest of the procedure is the same as exporting contact data. See *"Exporting Contact Records" on page 330*

Charting Market Data

Displaying Market Trends Graphically
Market Area Activity Charts
Price Comparisons to DOM Reports

Displaying Market Trends Graphically

TEMPO 5 can generate eye catching charts to highlight historical market trends and compare listing and sale price differences using MLS data. Give your reports some impact by inserting these comparative charts into your CMAs and flyer presentations. There are two types of charts available:

- **Market Area Activity** — create three levels of geographical chart for a single listing record.
- **List Price vs. Sale Price with DOM comparison** — create a chart comparing the list price, sale price and the number of days on market for multiple listing records (maximum 20).

To generate a chart for a single listing record:

1. From the listing Search Results page, select one record in the list.
2. Using the mouse, point to the Information icon to display the Quick Access menu, then click the **Charts** icon.

   The Charts dialog opens.

3. Click the **Chart** drop-down list and select:
   - **Market Area Activity by Area Number** — charts the activity based on the Area Number search criteria (e.g. 306).
4. To cut and paste this chart into another program, click the **Copy Chart to Clipboard** button.

- when you are ready to insert the chart, press CTRL + V to paste from the clipboard.

5. Click **Print** to send this chart to the printer.

   A standard Windows Print dialog opens.

6. Choose your print settings and click **Print**.
7. Click **Close** to exit the Chart dialog.

To generate a chart for multiple listing records:

1. From the Search Results page, select multiple records, then click the **Details** tab.
2. Select **Charts** from the sidebar.

   The Charts dialog box opens.

3. Click the **Chart** drop-down list and select:
   - **List Price vs. Sale Price with DOM Comparison** — charts the sales activity based on the list price, sale price and number of days on market for up to 20 properties.
4. To cut and paste this chart into another program, click the **Copy Chart to Clipboard** button.
   - when you are ready to insert the chart, press CTRL + V to paste from the clipboard.
5. Click **Print** to send this chart to the printer.

   A standard Windows Print dialog opens.

6. Choose your print settings and click **Print**. See *"Printing" on page 265*.
7. Click **Close** to exit the Chart dialog.

NOTE! *When creating charts from here, the Charts dialog gives you access to all of the reports; that is, Market Area Activity and List Price vs. Sales Price reports, regardless of whether you have selected one record or multiple records.*

Market Area Activity Charts

Market Area Activity charts are generated for a single listing and compares the number of Active, New and Sold listings (Y-axis) against the Average Sale Price in 000's (Z-axis) over a period of years (X-axis) for a specific geographical area. You can narrow the geographical area to three levels, each getting progressively more specific.

Price Comparisons to DOM Reports

List Price vs. Sale price with Days on Market Comparison charts are generated for multiple listings (X-axis) and compares both the List Price and subsequent Sale Price (Y-axis) against the number of Days on Market (Z-axis) and subsequent Sale Price. Based on MLS or CMA data, this chart can be inserted into your CMA presentations to justify the List Price of a property.

Adaptive Security

Data Security Overview

The Adaptive Security feature is a way for MLS Boards to secure their MLS data from misuse by having the ability to set rules for all members, and specify actions when those rules are broken.

NOTE! *These instructions are for the MLS users.*

This security feature is designed to pick up on software behavior patterns that represent possible misuse, for example, concurrent logins, multiple login attempts, high numbers of downloads, long session times, etc.

The security implementation includes:

- Duplicate Login Management
- Password Management
- IP Tracking
- Advanced Reporting

About Duplicate Logins

The Duplicate Login Management feature has two levels of management: Basic and Advanced. Basic Management has five standard rules that determine how TEMPO 5 will react every time a duplicate login violation is detected. See *"Basic Management" on page 341*.

If you want to set up more customized rules and actions for all or individual members, use Advanced Management. It enables you to do more than the Basic Management options such as applying special rules that you define yourself. See *"Advanced Management" on page 343*.

How Rules Work

Basically there are three parts to every rule you set up.

1. Overall time frame — The system tracks the number of duplicate login violations for an overall specified time frame that you define, (today minus #hours).
2. Threshold limit — Each rule has a specified quantity that you define. When the user exceeds the limit, an associated action is executed. Two rules can NOT have the same number.
3. Resulting action — Every rule has a specific action linked to it, so when applied, the rule executes a consequence, such as account suspension.

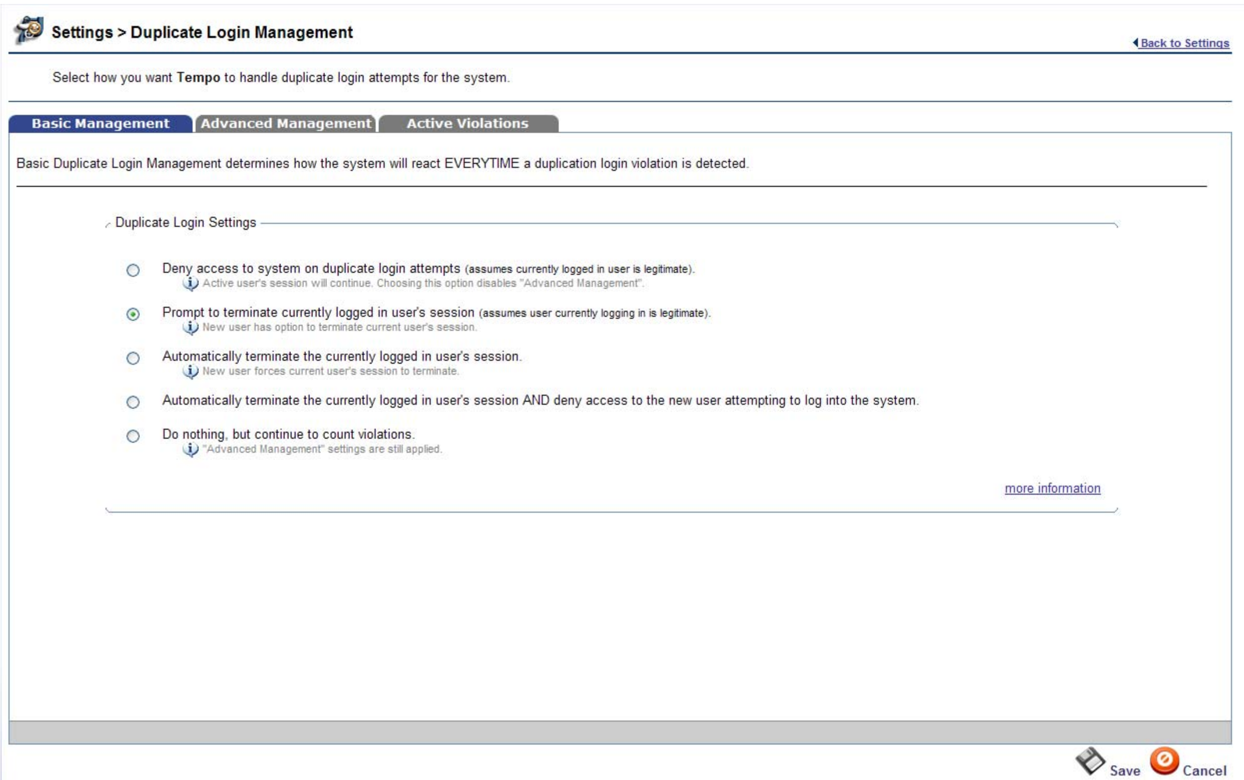
Basic Management

This area allows you to determine how the system will react every time a duplicate login violation occurs.

To access the basic login security features:

1. From the main menu, click **My Tools > System Tools > System Settings > Defaults**.
2. Click **Duplicate Login Management**.

   The Basic Management tab opens by default.



3. Select one of the **Duplicate Login Settings** rule options:

   Note: In all of the options, violations are recorded.

   - **Deny access to the system on duplicate login attempts** — denies login to a second user who enters the same User ID as the current user who is already logged in.

   Note: This option disables the Advanced Management options.

   - **Prompt to terminate currently logged in user's session** — asks a second user (using the same User ID to log in) if they want to terminate the current user's session.

- **Automatically terminate the currently logged in user's session** — informs the currently logged in user that a second user (with the same User ID) has logged in which automatically terminates their session.
- **Automatically terminate the currently logged in user's session AND deny access to the new user attempting to access the system** — informs all currently logged in users that their sessions are terminated; another user attempting to log in using the same User ID is denied login for the moment.
- **Do nothing, but continue to count violations** — duplicate login checking is not enabled, unless the advanced duplicate management is enabled. See *"Advanced Management" on page 343*.

*Note: Click the **more information** link to view additional information and examples for each of the options.*

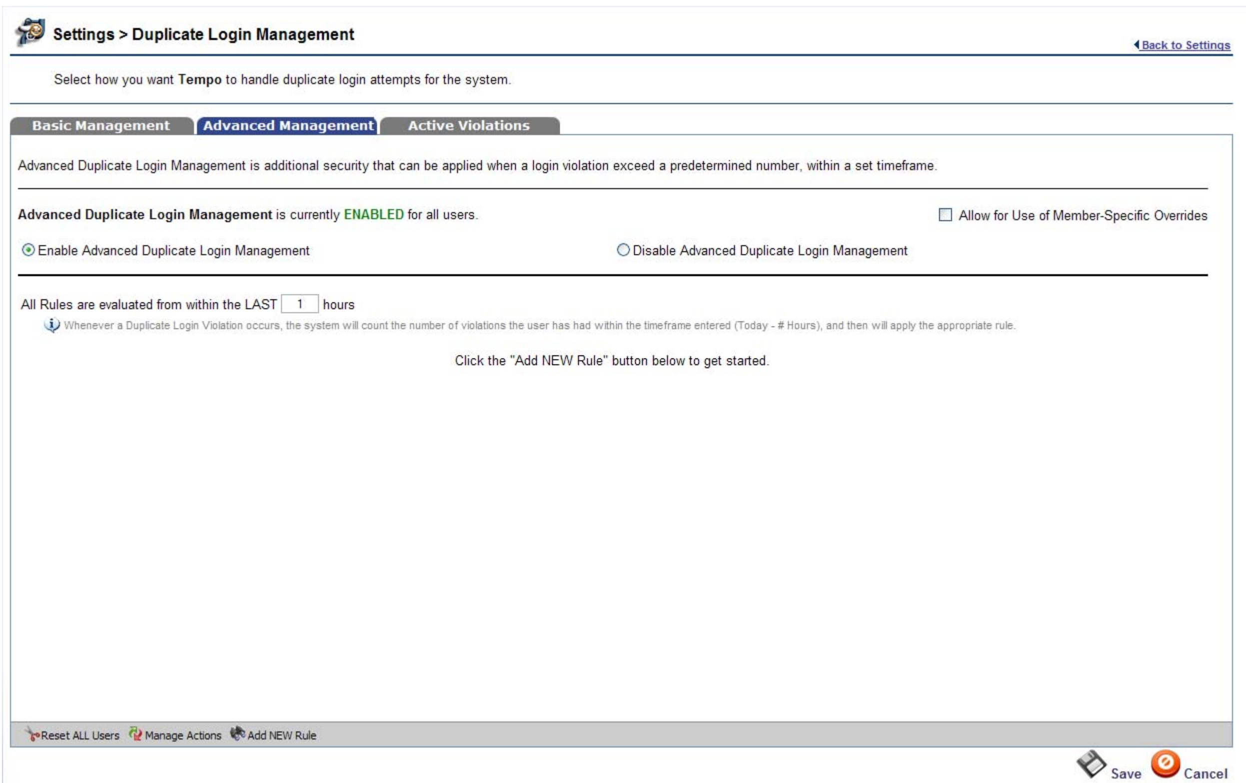
4. Click **Save**.
5. When the message box appears confirming your changes have been saved, click **OK**.

Advanced Management

This area allows you to enable or disable the security feature for all users; or create member-specific rules to be executed after a specific number of violations has occurred.

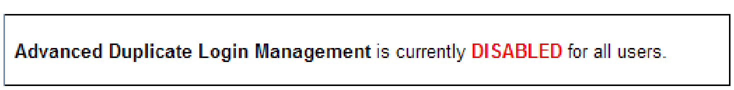
To access the advanced login security features:

1. From the Duplicate Login Management page, click the **Advanced Management** tab.



2. Select one of the following global options:
   - **Enable Advanced Duplicate Login Management** — enables this feature for all users.
   - **Disable Advanced Duplicate Login Management** — disables this feature for all users.

   The label text displays either ENABLED or DISABLED.



3. Select the **Allow for Use of Member-Specific Overrides** check box to enable specific rules for individual members. See *"Member Specific Options" on page 350*.

   Note: This option operates independently from the global options in step #2 and can only be set on a per board basis.

4. In the **All Rules are evaluated from within the LAST [x] hours** field, define ‘x’ as the number of hours that, when subtracted from today, defines the time frame the system requires to track the number of consecutive violations.
5. Click the footer bar controls to do the following:
   - **Reset ALL users** — resets the Violation Counter to zero for all users, without losing track of the actual number of duplicate logins.
   - **Manage Actions** — displays the Manage Actions dialog which enables you to create, edit or delete actions to be assigned to your rules. See *“Managing Existing Actions” on page 348*.
   - **Add NEW rule** — adds a new row to the page, enabling you to specify the time frame and assign an action to the rules. See *“Adding a New Rule” on page 344*.
6. Click **Save**.

NOTE! *Any rules that do not have actions associated with them will be automatically deleted when you click* ***Save****.*

Adding a New Rule

Each new rule you create must specify a number of consecutive login violations not to be exceeded; and a specific action to be executed when the number is exceeded.

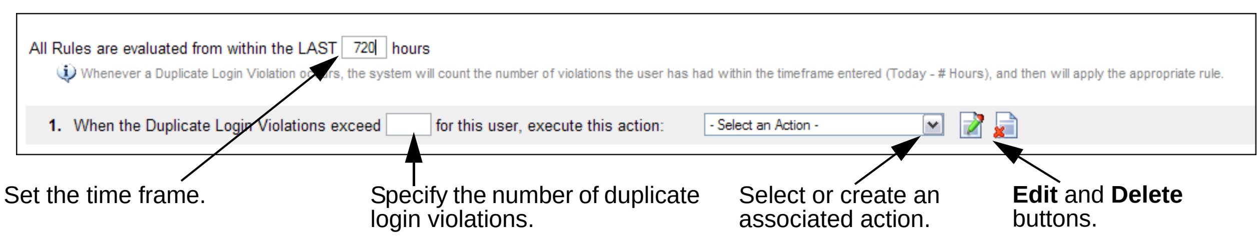
The rules will appear at the bottom of the Advanced Management page in ascending order (based on the number of violations).

Note: You will see the rules sorted properly upon your next login.

To create a new member-specific rule:

1. From the Advanced Management page, click **Add NEW Rule** from the footer bar.

   A new row appears in the bottom half of the page.



2. Ensure the time frame is set, for example 720 hours (one month).
   The system needs this time frame reference to track the number of violations.
3. Specify the number of consecutive duplicate login violations, for example 10.
   This is the number that, when exceeded, the rule and its associated action will be executed.
4. Click the drop-down box and select:

- **Select an Action** — displays a list of existing actions.
- **Create an Action** — lets you create a new action to add to the list. See *"Creating an Action" on page 345*.

5. To modify the new rule, click one of the following buttons:
   - **Edit** — displays the Duplicate Login Action [action name] dialog box which enables you to modify the selected action associated with the rule.
   - **Delete** — enables you to remove the rule. When the message box appears prompting you to confirm the deletion, click **OK**.
6. Click **Save**.

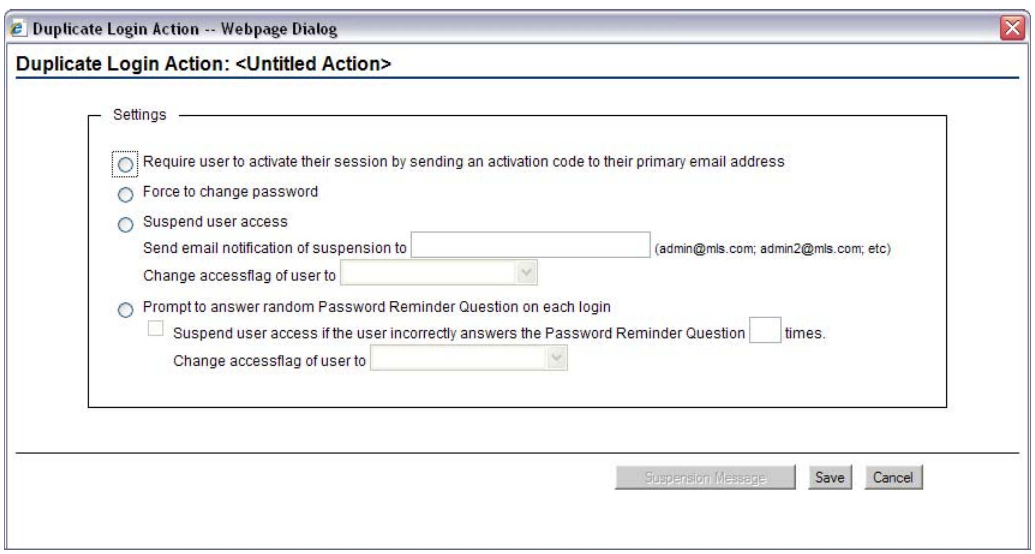
Creating an Action

You can create a new action to associate to the new rule. This action will be executed whenever the rule is broken.

To create a new action:

1. Assuming you have added a rule on the Advanced Management page, click the drop-down list at the end of the row and select **Create an Action**.

   The Duplicate Login Action dialog box opens.



2. Select one of the options available in the **Settings** section:
   - **Require the user to activate their session by sending an activation code to their primary e-mail address** — select this option to lock out the user until they enter an activation code. The User ID remains inoperable until the activation code has been entered. Other users do not experience any disruption.

- **Force to change password** — select this option to prompt the user logging in to change the password. Other users already logged in will be forced off the system once the password has been changed.
- **Suspend user access** — select this option to suspend an account. The user and other members who use the same User ID, will see a suspension message and their session will be terminated.
  Enter the e-mail address for the Board's administrator who wants to be notified that someone has been suspended, then click the **Change access flag of user to** drop-down list and choose an amount of time the suspension should last, for example **Suspend for 30 minutes**. The **Suspension Message** button becomes enabled, letting you create a custom message, otherwise the default suspension message is displayed. See *"Creating a Suspension Message"* below.
- **Prompt to answer random Password Reminder Question on each login** — select this option to display one of the personal verification questions randomly upon each login attempt. The question must be answered correctly for successful login.
  Further define this option by selecting the **Suspend user access** check box and specifying a maximum number of attempts the user has at answering the question. Then click the **Change access flag of user to** drop-down list and choose an amount of time the suspension should last, for example Suspend for 30 minutes. The **Suspension Message** button becomes enabled, letting you create a message. See *"Creating a Suspension Message"* below.

3. Click **Save**.

   The Save Action dialog box opens.

4. Type a descriptive name for this new action in the field.
5. Click **OK**.

   The action will now be available in the drop-down list, ready to be selected and associated with new rules.

Creating a Suspension Message

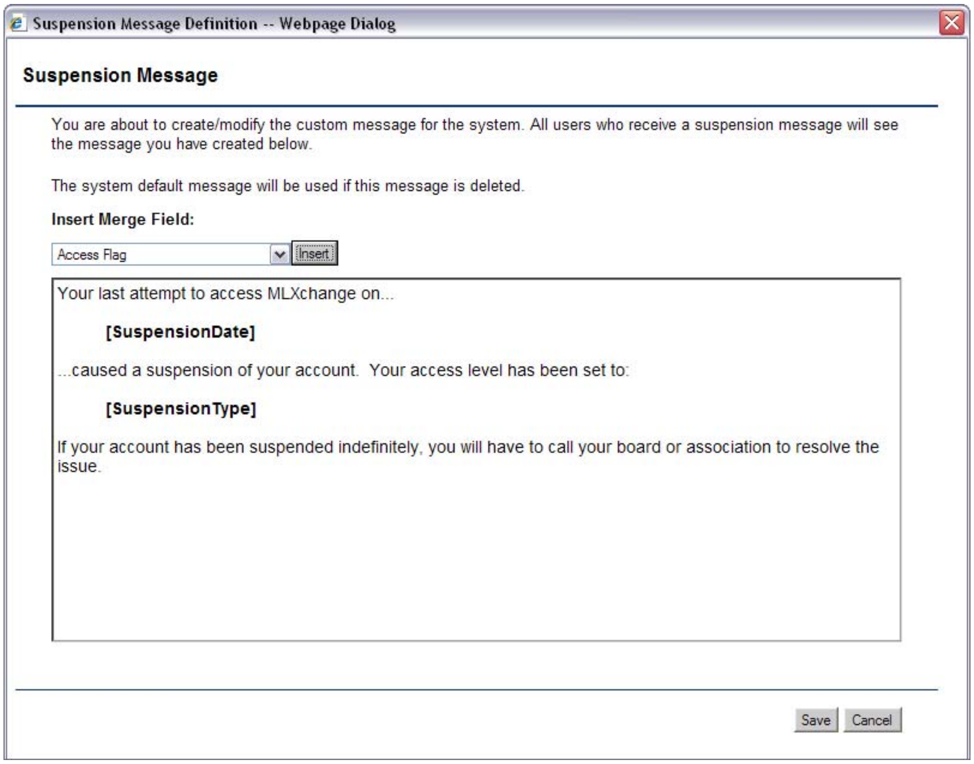
You can create a rich text message that will appear to all users who receive a suspension, and will persist until the suspension has ended or the board has re-defined the action. Each board can have its own suspension message, which is directly associated with a suspension type action that is executed upon a rule violation.

NOTE! *Should you delete this message, the system default message will be used.*

To create a customized suspension message:

1. Click the **Suspension Message** button, available when certain options are selected on the Duplicate Login Action [action name] dialog box.

The Suspension Message pop-up window opens.



2. Type the text of the message in the text box.

   Note: The default system message will NOT be overwritten.

3. Place your cursor in the body of the text, then click the **Insert Merge Field** drop-down list and select a merge field.

   When the message is displayed, the appropriate values will be inserted into the merge fields. For example, the **SuspensionDate** field automatically inserts the date and time the suspension was recorded into the message.

4. Click **Save**.

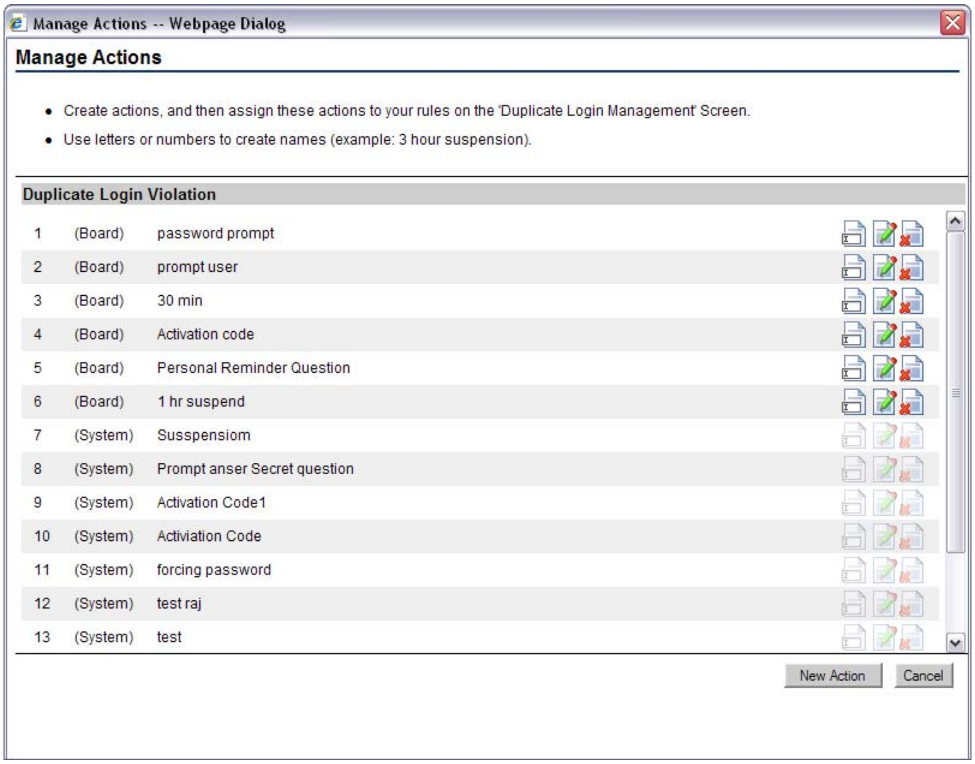
Managing Existing Actions

You can create, edit, rename or delete actions using the Manage Actions dialog box.

To access the Manage Actions feature:

1. From the Advanced Management page, click **Manage Actions** from the footer bar.

   The Manage Actions pop-up window opens.



2. To modify an existing action in the list, click a button at the end of the row:
   - **Rename** [ ] — displays the Rename Action dialog box, letting you type a new name for the action.
   - **Edit** [ ] — displays the Duplicate Login Action dialog box, letting you modify the settings.
   - **Delete** [ ] — lets you delete an action, if there are no rules associated with it.
3. Click the **New Action** button at the bottom of the page to create a new action.

Active Violations

The **Active Violations** tab shows a list of all members who currently have violations that prevent them from accessing the system. By looking at the violations reported, you can determine whether the rules are too strict or if you have more violators than previously suspected.

To generate a report of all current active violations:

1. From the Duplicate Login Management page, click the **Active Violations** tab.

   The page opens showing the current date and time the report was created.

2. Click the **Refresh List** button on the footer bar to display the most up-to-date view.

   Note: It is possible that upon refreshing the list, some of the violations will have been dealt with and, therefore, gone from the list. Other more current violators will have appeared.

3. Click the **Print** button on the footer bar to generate a report.

   A standard Windows Print dialog box opens.

4. Choose your printer options, then click **OK**.

Member Specific Options

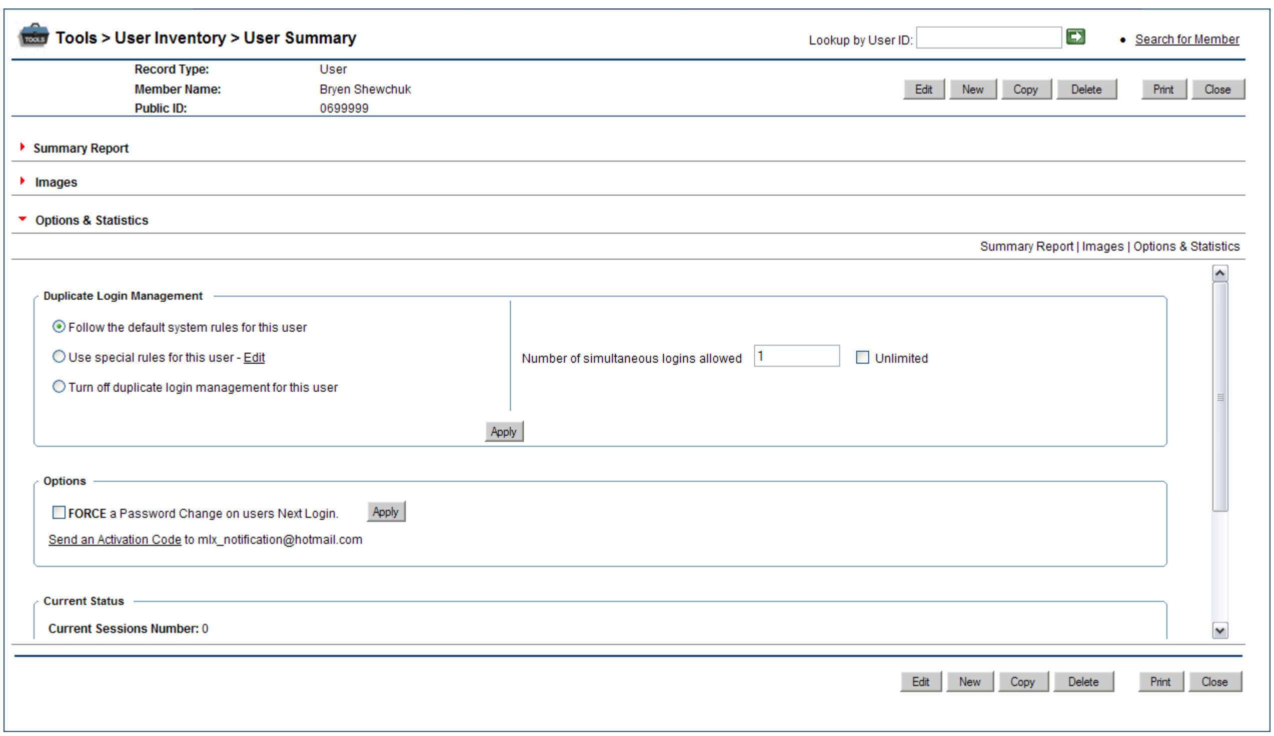
If you've selected the **Allow for Use of Member-Specific Overrides** check box on the Advanced Management page, you can manage duplicate logins for specific members directly from their record.

NOTE! *These options are only available to MLS level administrators.*

To manage duplicate logins for a specific member:

1. On the Advanced Management page, ensure the **Allow for Use of Member-Specific Overrides** check box is selected.
2. From the main menu, click **My Tools > Membership/Office > Membership Maintenance**.

   The Tools > User Inventory > User Maintenance page opens.
3. Click the **Search for user** link and perform a search.
4. From the Search Results dialog box, select a member from the list then click the **Edit Selected User** button.
5. From the member record, click **Options & Statistics** to expand the section.



6. In the **Duplicate Login Management** section, click one of the following options:
   - **Follow the default system rules for this user** — this is the default selection. When selected, the rule specified on the Duplicate Login Management page is followed.

- **Use special rules for this user** — lets you create a special set of rules that will apply only to this user when they log in. Click the **Edit** link to display the Member Specific Duplicate Login Rules pop-up window, which lets you add new rules and manage actions.

*Note: The Member-Specific Duplicate Login Rules pop-up window is used in the same way as the Advanced Management window is used to create new rules. Click the **Add a NEW Rule** button and follow the instructions in* *"Adding a New Rule" on page 344* *. Additionally, click the **Manage Actions** button to display the Manage Actions pop-up window. See* *"Managing Existing Actions" on page 348**.*

- **Turn off duplicate login management for this user** — when selected, login checking will not be performed on this member.

Note: Violations are still tracked and recorded.

7. In the **Number of simultaneous logins allowed** text box, enter a number representing the number of duplicate logins allowed before the associated action is taken.
   - select the **Unlimited** check box to allow any number of duplicate logins. No action will be taken.
8. Click **Apply**.
9. In the **Options** section, do one of the following:
   - select the **Force a Password Change on user's next login** check box to temporarily lock the member out of the system until they enter a new password on their next login. Click **Apply**.
   - click the **Send an Activation Code** link to automatically send (via the displayed e-mail address) the activation code required by the user to log in successfully.
10. The **Current Status** section is a view-only area where the administrator can see the **Current Sessions Number** for this member (the number of active sessions that are running).
11. In the **Statistics** section, click the drop-down lists and select a duration (today, current week, last month, etc.) for each recorded statistic you want to view:
    - total number of duplicate login violations
    - total number of failed password attempts

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