WEB ASSISTANT

User Manual

Rev 2.2a

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Table of Contents

Introduction

Welcome to Web Assistant. Web Assistant is the software that allows Leadmine CRM and Birdview web clients to manage their sites. Depending on role, Web Assistant users will have access to modules where they can:

- assign, work, and track contacts and leads
- manage listings
- edit site content
- maintain agent and office rosters
- configure drip e-mail campaigns
- configure select areas of the website

Available roles in the system are:

- Website administrator
- Agent
- Agent site owner
- Integration User (for those integrating a third party website or lead source with Leadmine and ProspectPro)

Terminology

CRM: Contact (or Consumer or Customer) Resource Management. Leadmine is an example of a basic CRM system.

Contact: This refers to clients of a real estate brokerage or agent. Sometimes this term is used interchangeably with terms like lead, customer, or consumer. This document will use the word "contact".

Viewport: The viewport is the visible area of a web page. This term is often used interchangeably with "screen size".

Import (Leads): This is a blanket term that describes how contacts are added to the Leadmine system. There are two ways users can do this using the application, which are described later in this document. One of Leadmine's strengths is its ability to take leads in from virtually any outside source. Contact your account manager for details.

A Word About "Responsive"

Web Assistant is a responsive product. What this means is that the layout will change and certain features of the application will be shown or hidden depending on the size of the device you're using.

Look for the Hamburger: If you're not sure where you are and you don't see a menu, look for the "hamburger". Clicking here will display a menu. This is a common navigational cue in responsive websites.
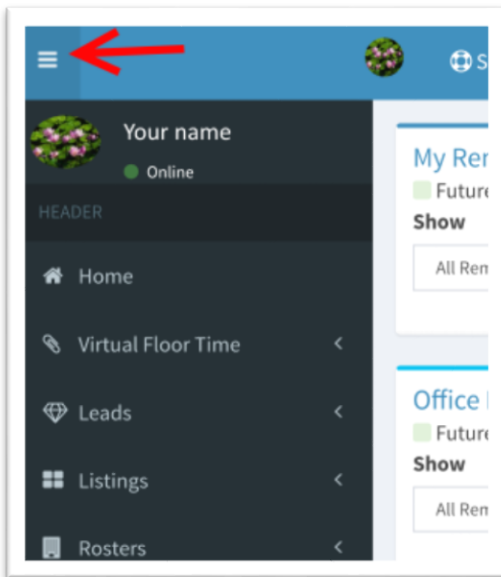
Look for the Plus Sign: If you're using a small device such as an iPhone, you're not likely to see all the columns you would see on a full-size desktop PC or Mac.
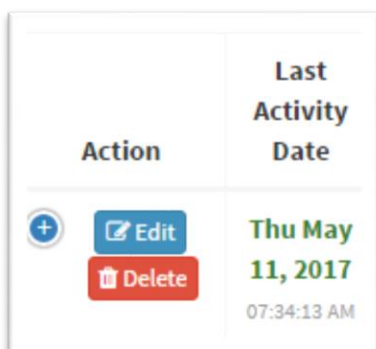
Clicking on the plus sign will expand the current record to show you the columns that were hidden due to the size of the viewport.

What's This?

In some places, the software will show you a circled question mark. ❓ The purpose is to provide a quick hint as to how something works. Simply hover over or click the icon, and the hint will appear.

I Think Something Is Missing In Here. What Now?

This manual may reference sections or features that do not apply to your user role (there are four of them) or the product(s) you use. With that in mind, please do not hesitate to contact your account manager if something is unclear or if you have suggestions about making this document more complete.
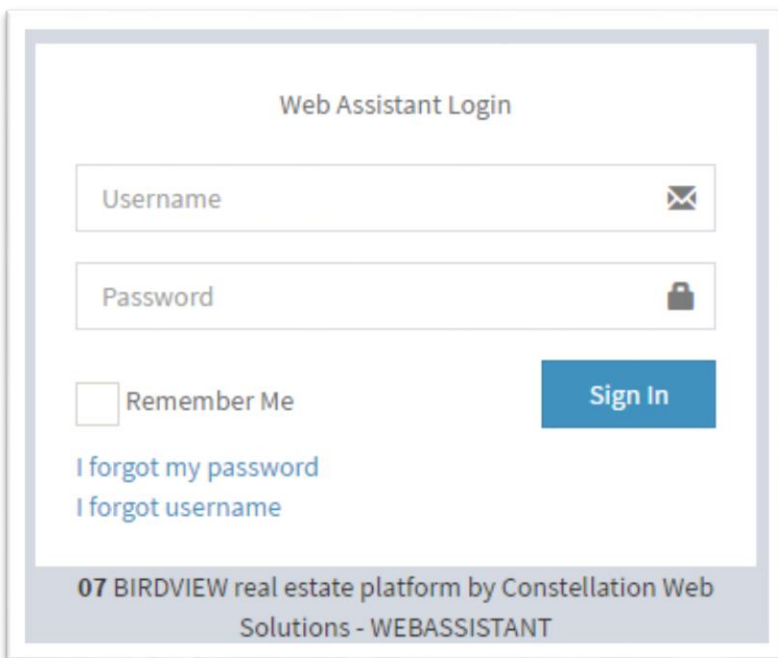
Getting Started

Sign In

At the bottom left of every Birdview website the following link can be found:

<u>Web Assistant – Restricted Access Only.</u>

Click here to access Web Assistant. The login page is shown below.

Enter your user name and password here and click **Sign In**.

Forgot Username

Click **I forgot username.** You'll be prompted for the email address you normally use, and if it is linked to an authorized user name, the user name will be e-mailed to you.

Forgot Password

Click **I forgot my password**. Type in your user name when prompted, and click **Submit.** A link will be sent to the email address you provided separately. Use this link to access Web Assistant. **Note:** The link expires after 60 minutes. For security reasons, a note will go to customer support after three failed attempts to change a password.

Sign Out

Click on your name or role (top right). Click **Sign Out.**

The Home Page

Home is the top link found in the slide-out menu or left-hand navigation pane. This page may contain any or all the following items, depending on your role:

Office Reminders & My Reminders

The reminders sections on the home page of Web Assistant are designed to help users easily and quickly keep track of recent and upcoming tasks. You can filter the list by selecting past, present, and future items as shown below.
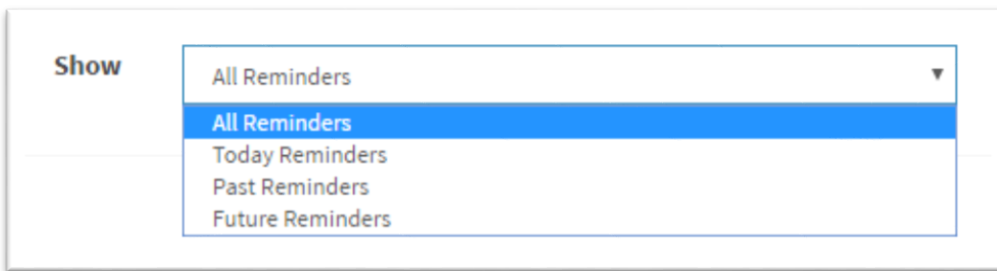
Items are color-coded (green is future, yellow is today, light red is in the past)

Reminders for leads assigned to the signed-in user are found in **My Reminders.**

Reminders set to contacts that have not been assigned to a particular agent are displayed in **Office Reminders** and accessible to users designated as administrators. For additional information on actions that can be taken on reminders, please see the **Leadmine** section.

Dashboard

Dashboard is a display-only section. It displays a quick-glance view of important operating information that may include, but is not limited to:

- **Email limit**: a count against the limit to the number of outgoing messages (generally 3,000) that Leadmine Mail™ is permitted to generate each month
- **Number of agents**
- **Agents that have received leads**
- **Office Statistics:** office location(s) and active leads for each

Support

Support

This feature gives you quick access to our account managers and support staff. Click **Support** and fill out the form shown. Information may auto-fill based on profile information we already have for you. If you wish to change anything, do so and then **Submit Request.**
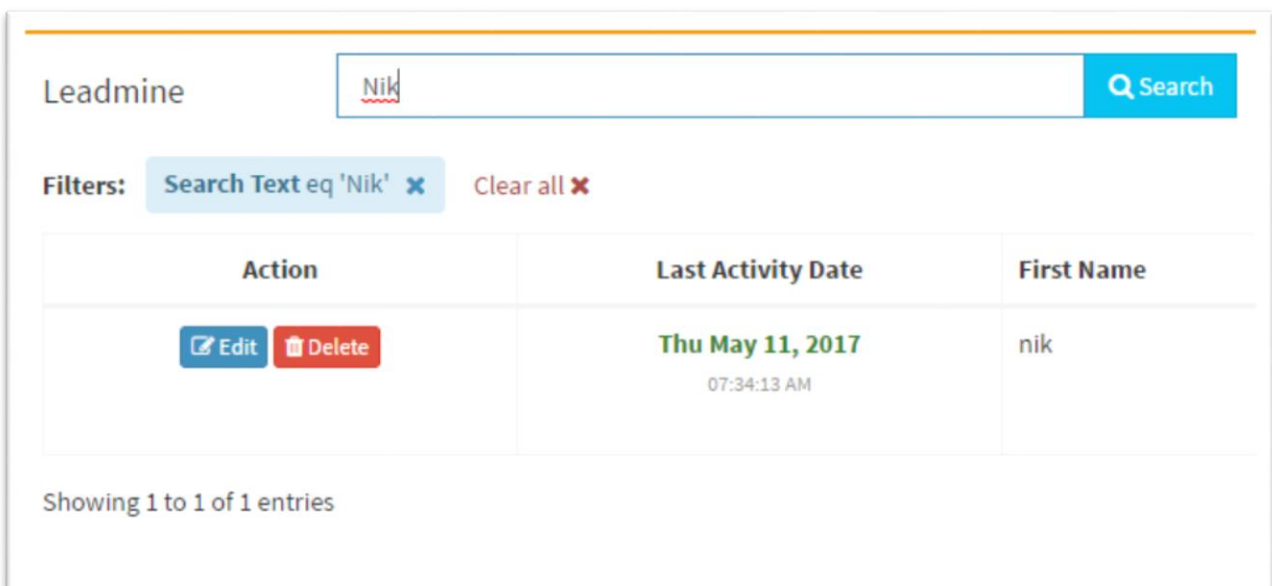
Leadmine

Leads

Leadmine CRM is a simple, easy to use real estate Client Resource Management system that allows users to effectively stay in touch with prospectives no matter where they are in the sales process. Leads can be ranked and sources tracked, allowing brokers and agents to focus on the clients and marketing channels that ultimately lead to closings.

Search

The fastest way to find a specific person in the Leadmine database is to type a few characters and click **Search**. Leadmine will locate names, phone numbers, and email addresses matching the characters typed.

To reset a search or remove a search criterion, simply click the "x" next to its label. Click **Clear All** to remove all criteria.

Advanced Search: to find a list of leads meeting more specific criteria, click **Advanced** (to the right of the search box). A list of possible search criteria is displayed.

Plans: Filter records by client intent. These values are: buying, selling, relocating, and renting.

Activities: Filter by last activity carried out by a client or by the system as it relates to that client. Examples: client requested information, client was sent listing alert, etc.

Lead Source: Filter by dynamic, custom values used in your office to identify the means by which a contact became a lead. Typical values could be "Google search", "Referral", "Open House Visit", "Website", etc., but can be anything that makes sense to you. The searchable values in this selector are the values entered into each contact profile.

Tags: Much like Lead Source, this filter is a set of dynamic, custom values that are meaningful to the user, office, and/or brokerage. Tags are assigned to contacts, and those values are then made available here as filters, allowing you to quickly locate a contact or set of contact records.

Company Name: Filter records by the name of the company at which the contact works.

**Agent:** Filter records by the agent assigned to a lead (when applicable).

Reminder: Filter records by the type and status of an existing reminder that has been previously set.

Start Date/End Date: Filter records having a last activity date in the window between specified dates, inclusive.

Reset clears the selected criteria.

Search executes the search with selected criteria.

Once results are returned, these filters can be selectively removed or cleared all at once, as described above. You can change the number of client records that appear on this page using the selector at top right (options are 10, 25, 50, or 100 records per page).
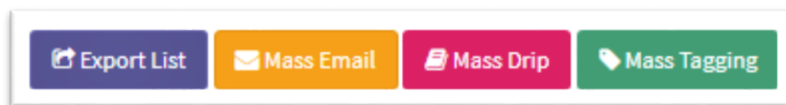
Exporting Leads
Allows user to export lead records as shown in the current view displayed. If no filter is in use, the entire lead database is exported. To export, click **Export List.** Choose the email address that the exported file should be sent to, and click **Send.** The exported list will be in comma-separated (CSV) format.

Mass Email
Similar to exporting leads, this feature allows the user to send an e-mail to the clients displayed in the current view. An unfiltered view means the message will be sent to all

clients active in the database (which is to say, use this feature with caution). Click **Mass Email**, add the subject line, and compose the message using the HTML-enabled content editor. Click **Send.** You will be asked to confirm that you wish to send a message to the selected number of contacts.

Mass Drip

This feature allows the user to quickly assign multiple contacts to selected drip marketing campaigns. Click **Mass Drip**. Choose the campaign(s) to which you wish to assign the displayed contact list, and click **Assign Campaign.** You will be asked to confirm that you want to assign the contact(s) in the displayed list to the number of campaigns checked.

Mass Tagging

This feature allows the user to apply one or more custom tags to the set of contacts displayed on screen. Tags allow users to group leads by some value that is meaningful to the user, office members, brokerage, etc. Click **Mass Tagging**. Type any word and press enter. Assign a lead as many tags as you like, and click **Save.** You will be asked to confirm that you wish to assign the tags created to the number of contacts displayed. You can then easily locate these contacts later using the advanced search.

Lead "Thumbnail" View

The **Action** column allows the user to act on client profiles. **Edit** will display the detailed profile of a client, where changes to the profile can be made. **Delete:** Removes a client record from the database. **Note**: this action cannot be undone without intervention from support staff.

The column may take on a couple of different appearances, depending on the device being used. This possibility is covered above in **A Word About Responsive.**

Last Activity Date is the date and time of an action taken as it relates to this client. This could be a client-initiated action (submitting a lead, for example) or by a Web Assistant user (such as editing the client profile).

Email is the client's email address. The value in this column is a link, and clicking it will open a pane that allows the user to send this contact a quick message.

Phone is the client phone number. The value in this column is a link that, when clicked, will open a pane allowing the user to send a text message to the phone number shown.

Reminder shows the next task or event affecting this client. If there are no such future events, the most recent event is displayed here instead.

Lead Detail View

This is the pane that contains vital contact information and client history.

Topmost section: the email address can be clicked to activate a pane for a quick message, reminder graphics are displayed (on the applicable date each year), a lead may be reassigned, and a contact can be opted out of receiving marketing mail.
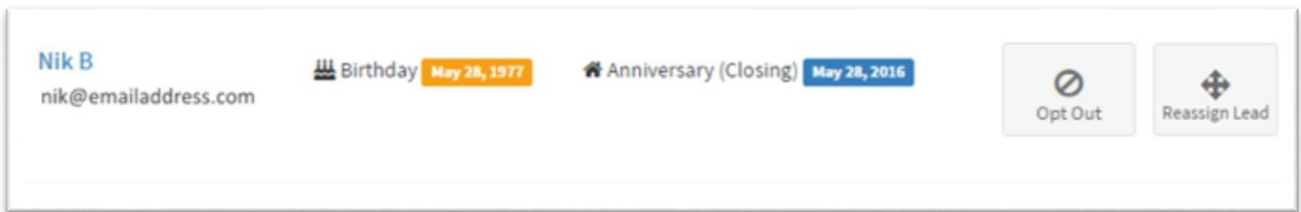
Important! On some leads, you may see this in the top section:

This is an indication that this individual does not wish to receive marketing email. Please honor this preference.
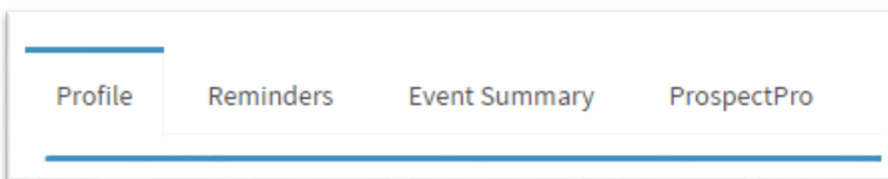
Lead Profile

In the **Profile** tab are two sections. The first is **Personal Information**, which contains all contact information including milestone dates (birthdate, anniversary of last closing), spouse information, etc. Also found here are the contact's intentions, general notes, and so on.

Profile notes:

- **Lead Source** is not filled automatically but one or more values can be typed and saved here, and then later used to easily filter the Leadmine summary page using the Advanced Search.

- **Tags** are similar in behavior to Lead Source. They allow the user to apply one or more "free form" values to the contact for easy lookup later using the Advanced Search. The value(s) typed here should be meaningful to the user and his/her associates.
- If listing alerts are in use for this client, the client password can be set here.
- Most fields are optional.

Listing Alerts

If the site is configured for it, the second section is **Listing Alerts.** In this section, the user can configure one or more property searches that will automate the delivery of e-mails showing the client properties that best fit their interests. Administrators and agents have the option to create these on behalf of the contact; also shown in this section are alerts the contact has set up.

Alerts can be created, changed, or removed here. Also, note the **Send** button. Clicking this button allows the user to instantly send a listing alert, with a personal message and relevant listings, to the client. This is particularly useful when time is of the essence.

Reminders

In the **Reminders** tab, users can set and manage tasks as they relate to the real estate transaction process here, and be reminded of these "to-do" items later.

Add: Select the type of task (general task, phone call, meeting, closing). Add the date and time (both are required), and any comments (optional). Click **Save**.

Manage: in the right-hand pane, tasks can be searched, edited, marked completed, or deleted entirely. Also, note the "sort widget":
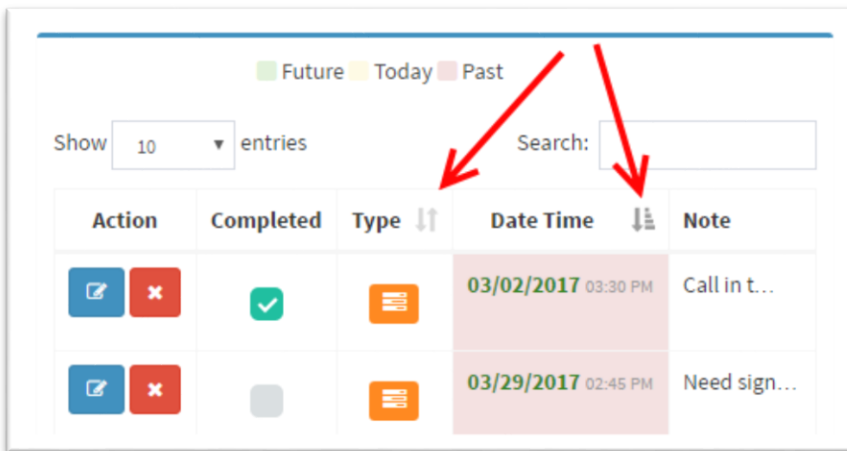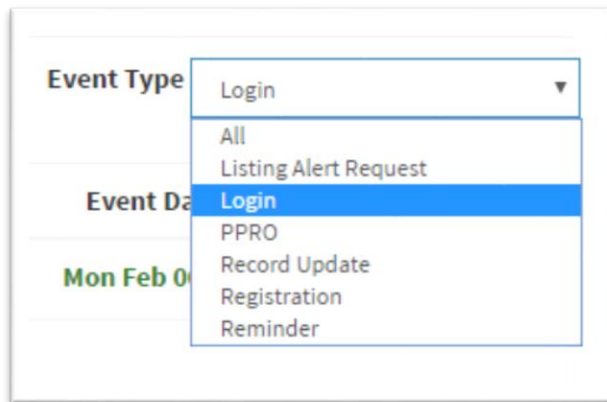

The presence of this widget means that the column is sortable when the widget is clicked.
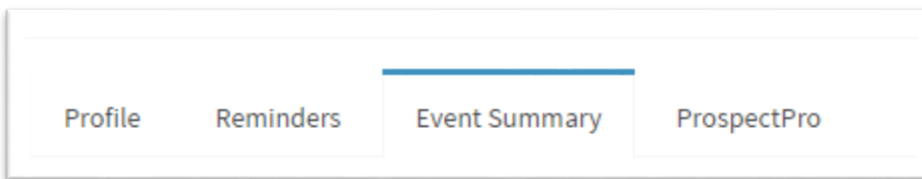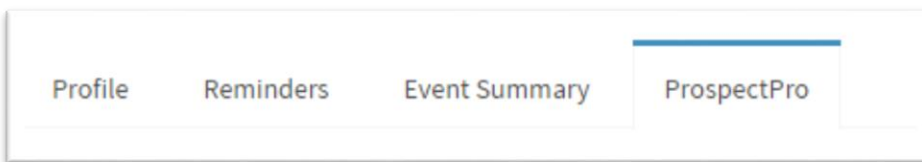

Event Summary

This section displays the history of all activities executed by the client or the user assigned to the client since the first contact. The list can be lengthy for long-term clients, so the list can be filtered by type of activity, as shown below.

The **Activity** and **Event DateTime** columns are sortable. Click **View** to see more detail about an event.

Email Campaigns
Leadmine Mail is a drip marketing and campaign system formerly known as Prospect Pro. The purpose of the system is to generate useful emails to a targeted client base, automatically maintaining contact with them over periods of time that might be as short as a week or as long as several years. Leadmine Mail allows you to create multiple campaigns, each with messaging specific to a given client base.

Preferences
Global email settings are maintained here.

- The signature that will appear on generated messages. An image of your actual signature can be uploaded if you like.
- Company or agent logo (to appear in header of generated email)

Campaigns

A base set of campaigns were created and added to Leadmine Mail by default when the system was activated for you. These are:

- Buyers – Long Term
- Buyers – Short Term
- General – Housing Market
- General – Stay in Touch
- Relocation – Buyer
- Relocation – Seller
- Sellers – Long Term
- Sellers – Short Term

New Campaign

To create a new campaign, click **Add New Campaign** button at top right. Provide a title and description and **Save** your changes.
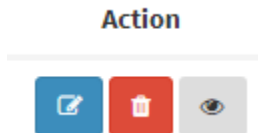
Edit Campaign

Clicking **Edit** next to a campaign will display a page in which you can change the title and description of the campaign, and maintain the set of messages that make up the campaign. With regard to messages, you can take these actions.

- Create a new message (**Add Campaign Message** at top). **Send Day** is an important numeric value. 0 (zero) will cause that message to be sent to assigned contacts the same day they are assigned, and as such are usually some kind of introduction or welcome message. Day 1 (one) messages will go out tomorrow, and so on. Click **Save** to save your new message.

Other message actions:

- **Edit** a message
- **Delete** a message
- **Preview** a message. A pane showing you what the message will look like is generated, with the headings, content, and signature you have specified.

Assign Campaign
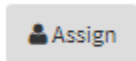
This is where contacts in your Leadmine system are associated to a campaign. Refer to the graphic below for instructions on how to add and remove contacts from a campaign.

Campaign Contacts : General - Housing Market   ×

1

In Campaign   Not In Campaign

2 | wie | **Q Search** | | **+Add** | Show | 10 ▾ | entries

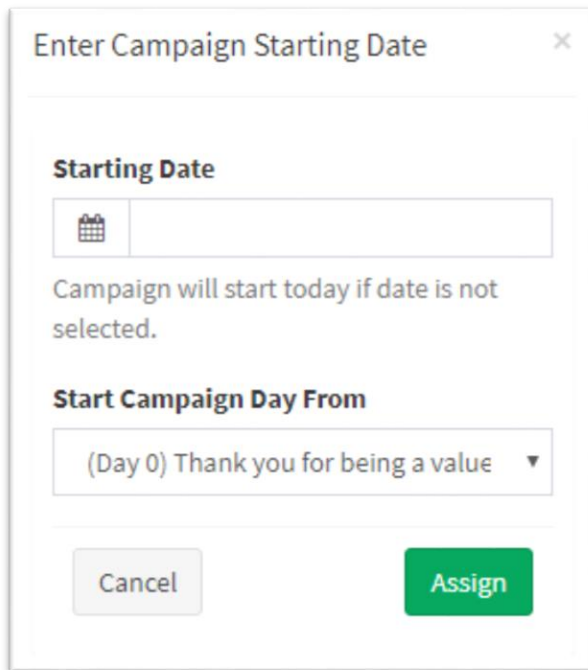|	First Name	Last Name	Email	Phone
☐		NA		
☐		NA		
3 ☐	Joe			
☐				
4				

Showing 1 to 6 of 6 entries

Previous | 1 | Next

Items:

1 The "In Campaign" tab will show you contacts already in the campaign. The "Not in Campaign" tab will show you all contacts available for the campaign

2 Names and email addresses can be searched

3 Check the box next to the contact(s) you want to add to the campaign and click the **Add** button above. The pane shown below will appear.

Here, you have the option to start the newly-assigned contact out with campaign messages other than the first one, which is the default. Click **Assign.**

4 Highlighted contacts with no check box next to the name cannot be added to a campaign. This usually means the contact has opted out of receiving marketing emails.

Share Campaign

Drip mail campaigns sharing is a feature that is initiated by the broker/administrator. It makes campaigns visible to agents for their use and eliminates the need for agents to do basic campaigns on their own. Agents DO, of course, have the ability to create and customize campaigns as they see fit.

To share, click **Share**. In the pane that appears, a slider control can be switched between "share" and "not shared".
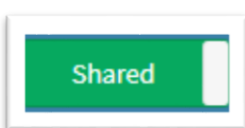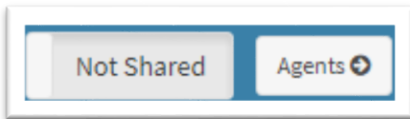
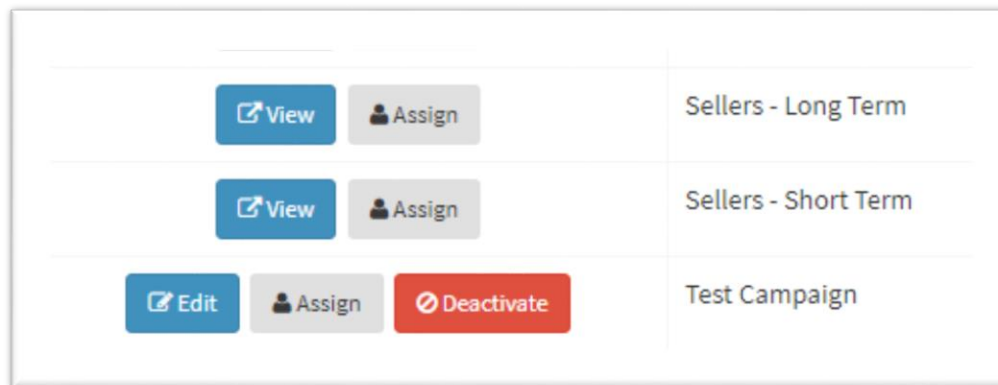When a campaign is not shared with all agents in the office, it can be shared individually by clicking **Agents->** and choosing the appropriate agents in the pane that appears. Click **Share** (at bottom of pane) to save changes.

This is typical of what the agent sees:

In the screen capture above, "Test Campaign" was created and is owned by the agent, meaning all messaging is controlled by the agent. The other campaigns shown were shared by the broker/administrator. Contacts can be assigned as needed by the agent, but these campaigns cannot be changed or removed by the agent.

Note: if a contact is associated by the broker to a campaign, and that contact is later assigned to the same campaign by the agent working with this contact, the email messages sent will display _agent_ branding.

Deactivate Campaign
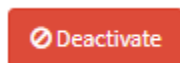
Click to shut down a campaign. This action can be undone (see Deactivated Campaigns) below.

Deactivated Campaigns

Campaigns no longer in use are stored here. They can easily be reactivated by clicking **Activate.**

Add/Import

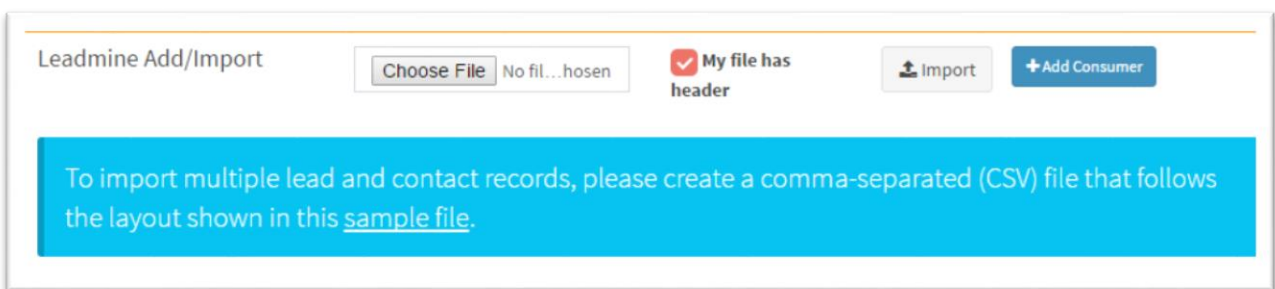Regular users can add leads to the system one by one, or import them from a simple comma-separated (CSV) text file. To add a single client or lead:

1. Click **Add Contact**
2. Enter the details in the pane that is displayed
3. Click **OK**
4. Click **Save Contacts** to confirm

To add multiple contacts, you will select a text file from your files. Its layout should match the sample file provided (see link in the blue section of the figure above).

1. Click **Choose File**
2. If your file has column titles in the first row, check the "my file has header" box. Click **Import.**
3. Verify the imported data
4. Click **Save Contacts**
5. Contacts imported in bulk will be automatically tagged with the imported file name so they be easily located later. However, if you wish to alter or remove the automatic tag, or add your own, you can use the prompt that appears to do so. Once all is in order, click **Save.** You'll be prompted to confirm.

Listings

Featured Properties
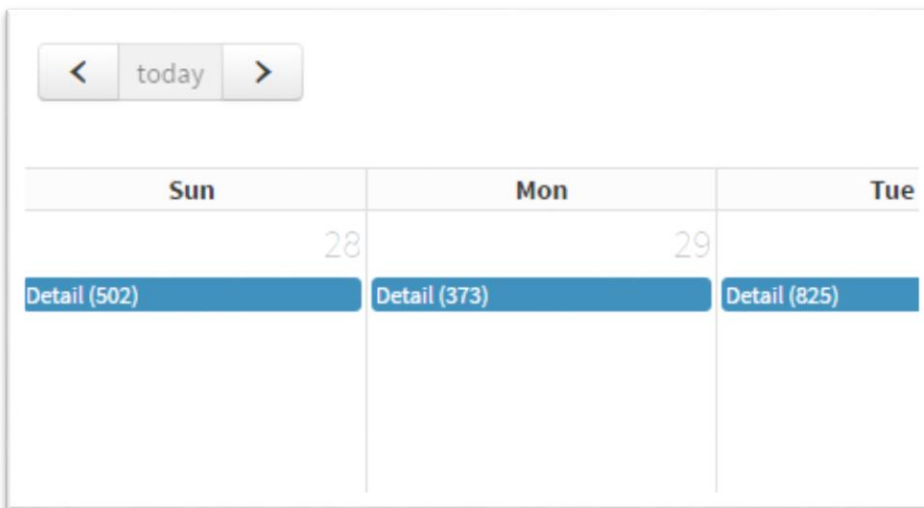
This module allows users (on sites where this feature is activated) to manage the priority list for listings to be displayed as "featured" on the home page of the website. This option is supported by many, but not all, Birdview websites templates.

Notes:

- Any or all property types can be selected, but at least one is required for the feature to work
- Enter price ranges as numbers only (no commas needed)

Homeviews

This section is designed to give users a quick view into which homes for sale are drawing traffic. Each number in the calendar view below is a link showing property hits by day.

Clicking a link will display the property viewing detail for that day. Properties can be searched by listing number, and columns can be sorted.

Listing Manager

Generally, the use of a Booster License for an MLS feed is all the system needs to support a fully functional property search. However, there are situations where the ability to edit an office's or agent's listings is required. This module makes that possible.

To find a specific listing in the property database, type a few characters and click **Search**. Listing Manager will locate MLS numbers, addresses, cities, or ZIP codes matching the characters typed.

To reset a search or remove search criteria, simply click "x" or **Clear All**.

Advanced Search: to locate listings meeting more specific criteria, click **Advanced** (to the right of the search box). A list of possible search criteria is displayed.

By Agent: Filter records by agent or office. The list of available values in the selector immediately below depends on what is selected here.

Agent/Office: Filter records by the office (for sites with more than one) or by the selling agent.

Other Filters: Price Range, Property Type, City/Town, ZIP code, State. **Open House**, when checked, limits the filtered list to only those properties with an upcoming open house.

Reset clears the selected criteria.

Search executes the search with selected criteria.

Once results are returned, these filters can be selectively removed or cleared all at once, as described above. The user can change the number of client records that appear on this page using the selector at top right (options are 10, 25, 50, or 100 records per page).
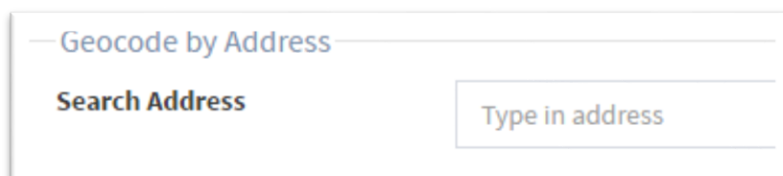
Add A Listing

At upper right of the listings overview, click **Add New.**

A form is displayed allowing the user to input a new property for sale.

- Select listing agent (if the current user is an agent, there is only one option here)
- Add MLS Listing Number. This field is only needed if the intent is to override the information for a listing of the same number currently in the MLS. If the property in question is not in the MLS, leave this blank. A number will be automatically generated.
- Add basic property information (type, price, status, beds, baths)
- Add additional property information as applicable (subdivision, development name, school district, HOA fees, acreage, square footage, year built, garage). Highlight features that apply: basement, fireplace, waterfront, golf course
- Geocode: enter the listing address. The first few characters will result in automatic suggestions. As soon as the correct address appears, select it and a latitude/longitude (for map searches) will be displayed, along with the best matching address based on what was typed.

The precision of the plot is not guaranteed and multiple matches are possible. Please verify the point plotted and adjust if necessary.

- Remarks are self-explanatory. If the listing is in the MLS, users have the option to supplement MLS remarks with their own, or override MLS-sourced remarks entirely.
- Add photos.

Add Listing Photo

Photo

Choose File NCM5904...07.jpg

Caption

Great kitchen

Remarks

Kitchen remodeled in 2016!

💾 Save

1. Click **Choose File** to select a file to upload from your computer.
2. Enter a caption (optional)
3. Enter remarks (optional)
4. **Save.** Note: this action does not save the listing itself. This step will occur shortly, and the photos added here will be saved along with all other property information.

- Add Open House(s).
    1. Click **Add New.**
    2. Enter required data (date, start time, end time)
    3. Enter optional information (development name, directions, remarks)
    4. **Save.** Note: this action does not save the listing itself. This step will occur shortly, and any open houses added here will be saved along with all other property information.

- Add a YouTube video link. If you wish to display a link to a YouTube video for this property, you can copy-paste it here.
- Add a Virtual Tour link. If you wish to display a link to a third party video tour for this property, you can copy-paste it here.
- **Save.** At lower right, look for the Save button.

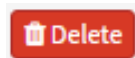Click here to commit all data entered to the database.

Edit A Listing

From the Listing Manager default page, you may update an existing listing. All data entry works the same as if user was adding a listing (above).

Delete A Listing

From the Listing Manager default page, you may remove a listing from the database. Use with caution as removal of the listing also removes any history associated with it.

Rosters

Agent Manager

In most cases, agent information will be automatically updated as part of the IDX feed from an MLS. However, there are cases where such information is not supplied by an MLS, and in some situations it is useful to override such information.

The default agent list view is a quick-glance look at the roster of agents in the office or company. To search for an individual, type a few characters into the **Search** at top right. The application will automatically filter the list to agent records whose names match the characters.

Several columns are sortable, and you can choose to show 10, 25, 50, or 100 records per page using the selector at top left.

Add An Agent

At upper right of the listings overview, click **Add New Agent.**


Complete the form displayed. Below are additional explanations for certain fields:

- Agent ID: The agent's MLS ID.
- MLS: This is pre-set. If the agent is not a member of the default MLS shown, please contact Support.
- Mobile Phone Number: this value is optional but essential for text notifications
- Designations: optional, and more than one designation can be selected.
- Web Address: begins with http:// or https://. Agent's website, if applicable.
- Additional Offices: generally agents work out of one office, but additional offices can be selected here.
- Agent Options
    - Display on Roster: this is usually checked. Uncheck to hide the agent profile from the agent roster of your website (if using a Birdview website)
    - Prevent Overwrite: check this box to prevent automatic updates to agent profile information from the applicable MLS. Useful if the agent or administrator has updated profile data here previously.
    - Include in Lead Distr. List: check this box if this agent should be available for leads distribution in Leadmine.

- Receive text notifications for leads: self-explanatory, but verify that a mobile phone number has been provided above.
- Receive Daily Digest: check this box to receive an email early each morning summarizing follow-up tasks, reminders, and milestones for the upcoming day. Uncheck to opt out.
- Crest ID: enter a value if you have an ID for the Crest system.
- Photo: recommended photo size is 120 pixels by 148 pixels. Click **Choose File** to select a file to upload from your computer. To remove a photo, click **Delete.** The change is not committed to the database until the user clicks **Save.**

Edit An Agent
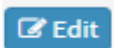
From the agent listing default page, you may update an existing listing. All data entry works the same as if user was adding an agent (above). One new field is available for content that is not available when an agent is added:

Click **About Me** to open an HTML text editor that allows the user to create a written narrative outlining an agent's experience, specialties, and other biographical information.

Delete An Agent
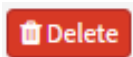
From the agent listing default page, you may remove an agent from the database.

Office Manager

The default office list view is a quick-glance look at the company office records. To locate a record for a single office, type a few characters into the **Search** at top right. The application will automatically filter the list to records with a street or city matching the characters.

Several columns are sortable, and you can choose to show 10, 25, 50, or 100 records per page using the selector at top left.

Click the **Company Agent Blast** button to send an email message to all company agents. In the pane that opens:

- User can type in the title or name of the sender, the subject, the reply-to, and the message itself
- User can override the recipients of the message in the **Bcc** box, or use the pre-filled list

Note: the email "from" is automatically set to an authenticated domain (a domain that is recognized by major email service providers like Gmail and Yahoo). Web Assistant does this to drastically improve deliverability and reduce spam.

Click **Submit** to send the message.

Edit An Office
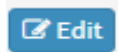
Make changes as needed on the form shown. Below are additional explanations for certain fields:

- Display on Roster: this is usually checked. Uncheck to hide the office profile from your website (if using a Birdview website)
- Prevent Overwrite: check this box to prevent automatic updates to office profile information from the applicable MLS. Useful if the agent or administrator has updated profile data here previously.
- ZIP Code: either a five-digit number or a ZIP+4 number is acceptable.
- Geocode: enter the office address. The first few characters will result in automatic suggestions. As soon as the correct address appears, select it and a latitude/longitude (for map searches) will be displayed, along with the best matching address based on what was typed.
- Photo: recommended photo size is 120 pixels by 148 pixels. Click **Choose File** to select a file to upload from your computer. To remove a photo, click **Delete.** The change is not committed to the database until the user clicks **Save.**
- **About Me:** click here to open an HTML text editor that allows the user to create a written narrative outlining the profiles and qualifications of the agents and administrators in the office.

Email Blast

Email Blast

Click the Email Blast button to send an email message to all agents in the selected office. In the pane that opens:

- User can type in the title or name of the sender, the subject, the reply-to, and the message itself
- User can override the recipients of the message in the **Bcc** box, or use the pre-filled list

Note: the email "from" is automatically set to an authenticated domain (a domain that is recognized by major email service providers like Gmail and Yahoo). Web Assistant does this to drastically improve deliverability and reduce spam.

Click **Submit** to send the message.

Agent Licenses

This section is accessible to broker/owners or lead managers. It allows users in those roles purchase Birdview agent websites or Birdview agent pages and Leadmine CRM access.
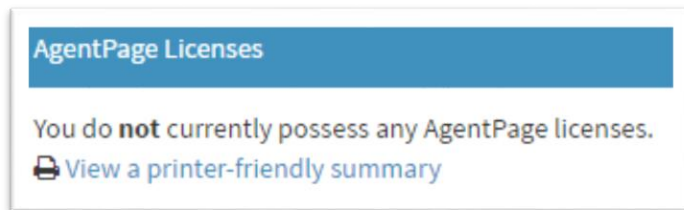
Agent Website Purchase

1. Click **Modify Agentsite License Configuration**
2. Check the box to the agent for whom you want to purchase a license
3. You may be prompted with this message. If so, click **OK**
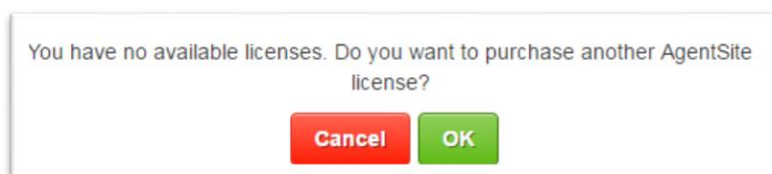
4. Click **Next** to complete the order

Agent Page/Leadmine CRM Purchase

1. If shown, click Modify Agentpage License Configuration. If not shown, stop here and contact your account manager as some additional product configuration is needed.
2. Check the box to the agent for whom you want to purchase a license
3. You may be prompted with this message. If so, click **OK**
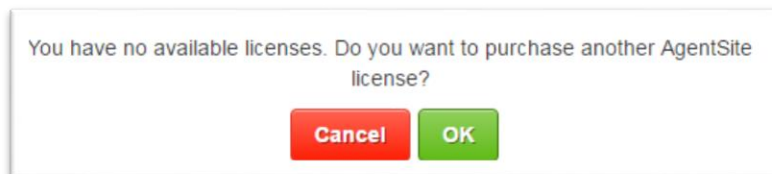
4. Click **Next** to complete the order

Website

This section's primary purpose is to manage content and the look and feel of your website.

Account Manager

This section contains key account- and site-level settings. Below are additional explanations for certain fields:

- **Account Name**: corresponds to office/team name for office/team website clients, and agent name for agent website clients
- **Address/City/State/Zip Code**: Address of corporate or primary office
- **Email**: default business email address
- **URL** – website domain name. Should be prefixed with http:// (https://, if available)

- **Google Analytics Codes**: Birdview websites support one or two Google Analytics codes. Acquiring at least one is strongly recommended. Contact your account manager if you need assistance.

Affiliate Manager

This section allows the user to configure the display of business partners the broker, office, or agent may have.

- In the default view, you may edit, remove, or change the order in which your partners appear on the website using this set of controls
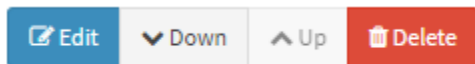
- To add an affiliate, look for the **Add New Affiliate** button. Clicking it will reveal a pane where information about the partner, including a banner photo and text description, may be entered.

  - The **Position** field refers to the order you wish to display the affiliate relative to others in your database, if any
  - Recommended banner photo size is 468 pixels x 60 pixels

Content Editor

Content Editor is a key module that allows users to add custom content to certain built-in pages on a Birdview website, and entirely new content pages as well.

Default SEO Tag Editor

SEO tags are important to search engines. Search engines look at page title and description to determine the relevance of your content page to search terms internet users might type in. Default SEO TAGS apply to every page of the website if no other values are given, and these default values can be customized by you.

For better results, we recommend adjusting these values at the *page* level, which will override the more generic defaults noted above. Content Editor also allows you to do this also.
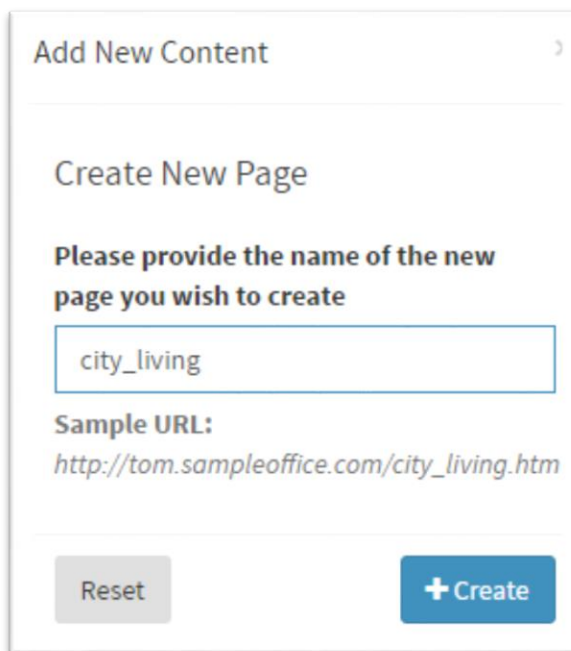
In general, you want to focus on geographic areas, real estate specialties and keywords and phrases contacts are likely to search for when seeking to buy or sell property.

Note: *Interior Page Title* on the default SEO tag page is blank by design. If an administrator provides no override value, the system will supply a page title.
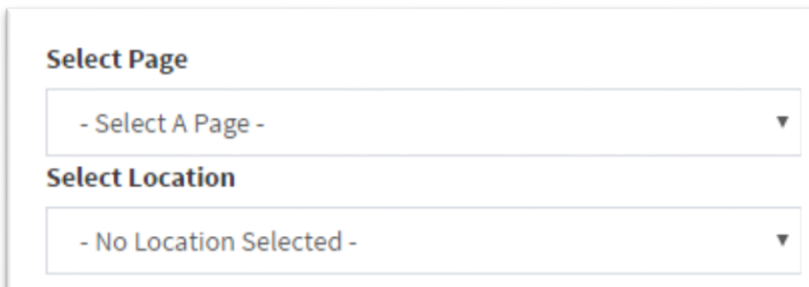
Add and Edit Content

To add a content page, look for **Add New Page** and click**.** As you type in the page name at the prompt, the URL will appear below. Click **Create** when finished, and you will have created an empty content page.

Click **Edit Your Content** to reveal a pane that allows you to maintain and create pages on your website.

To edit an existing page, choose it from **Select Page**. If the page has subsections, these will be selectable in **Select Location.** Pages that appear here include both custom content pages administrators may have created as well as base pages that always exist in the website.

SEO Information: Once you have selected a page (and optionally, a subsection) to work on, you may have the option to enter a custom page title and description (the existing or default values will show in these boxes). About 80 characters for titles and 100-200 characters for descriptions are recommended.

Page Title	Description SEO Tag	
ABC Realty - Career Opportunities	A rewarding career in real estate at ABC Realty awaits.	Reset
(up to 200 characters)	(up to 200 characters)	

Content: The content editor is below title and description. Basic text is easily entered, and for users comfortable with HTML, the editor supports many familiar features. Hover over the various buttons for a description of their purpose. Popular features include:

 Add/Remove a hyperlink

 Add an image/add a YouTube link

 Hand edit HTML source code

Click **Save** to commit the changes. Click **Restore Default** to restore built-in website pages that administrators may have customized to their "out-of-the-box" state.

**Page Deletion:** Look for **Delete** at lower right.

 Delete

This will only be available for your custom content. The site's built-in pages cannot be removed.

Design Architect

The purpose of this module is to give users control over design templates and images on the home page of the website.

Design

Click **Design Selector.** For sites using standard Birdview templates, a selector will be shown with various options. Using the selector box, choose a style. Using the **Color Editor**, choose a color scheme (example shown below).
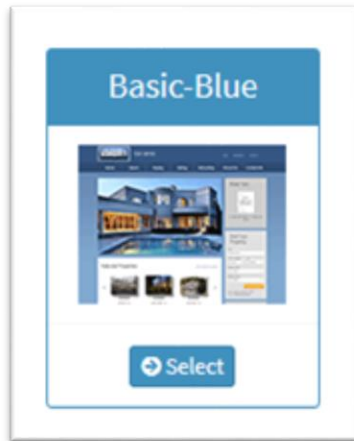
Click **Save** to commit changes. If you make a mistake or change your mind, simply revert to the previous settings.
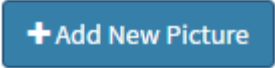
Home Page

Click **Home Page Editor,** then click the main image (example below).
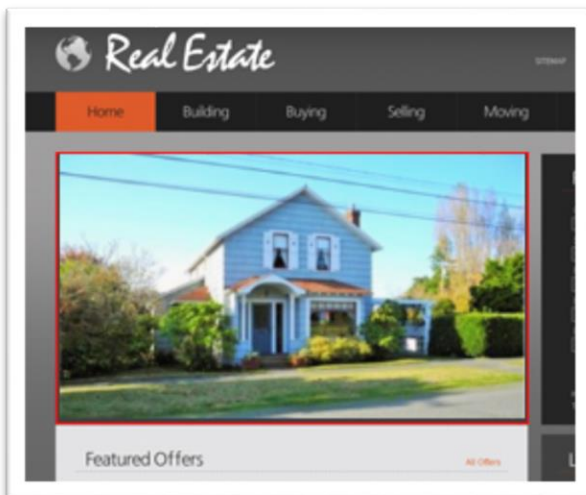
To select a previously uploaded image, click

To add a new image to the gallery shown, look for **+ Add New Picture** at top right. Click **Browse** to locate and select a file from your computer, then click **Open.** Click **Save** to commit the change.

Logo Editor

Click **Logo Editor.** The site's current logo (usually displayed top left on all pages) is shown. To change it, click **Choose File** to locate and select a file from your computer, then click **Open.** Click **Save** to commit the change. Verify appearance on the website. If necessary, repeat the process.

Navigation Editor

The purpose of this module is to allow for adjustments to the navigation menu that appears on most website pages. **Note:** there is only so much space to work with. Most sites use a horizontal menu, so a large number of menu items may result in items being hidden or wrapped to the next line.

Existing Navigation

Existing navigation items are displayed at left and can be dragged to the right under "Your Site Navigation" to be added to the menu. When done, click **Save My Changes** to commit the change to the database.

Create a New Link

- **Link name** is the name of the menu item
- **URL For Link** is the destination (if it is on the site, there is no need to type the full domain name.
- **Page Header** is the tag that appears when the mouse hovers over the menu item
- **Make this a popup:** this option will cause the menu item, when clicked, to open a new window. **Toolbars, Scrollbars, Width, and Height** only apply if the popup option is chosen.
- Click **Done.** The new item will appear at bottom right. You may then drag the item up to a new location in the menu.
- Click **Save My Changes** to commit the change to the database.

Edit a Link

- Click on the item at right, then click **Edit Selected Link.**
- Make needed changes

- Click **Done**
- Click **Save My Changes** to commit the change to the database

Remove a Link

- Click on the item at right, then click **Remove Selected Link.**
- Click **Save My Changes** to commit the change to the database

Change Menu Order

Click and hold the menu item and drag up or down to new location. Click **Save My Changes** to commit the change.

Service Center

Change Your Password

- Use a combination of letters, numbers, and special characters
- Don't use a password here that you are using elsewhere