USING THE CLIENT GATEWAY

What the Prospect Will See

The prospect will receive an e-mail with a link that connects to the Client Gateway.

The agent's branding information appears on the left as set in the Client Gateway Defaults.

The Client Gateway home page greeting appears above the listing references.

The Search Name appears below and links to the properties found in the search are displayed in a Detail List.

A full page report is available for each property in the Detail List. To access the full page report, click the property address.

To access all of the media, click the main photo.

The prospect may file the listing into one of three folders if desired. When the prospect clicks "I like this one," the property is filed in the "Favorites" folder and noted as "Favorite" in the Detail List. When the prospect clicks the "Possibility" link, the property is filed in the "Possibilities" folder and noted as "Possibility" in the Detail List. When the prospect clicks the "I don't like this one" link, the property is filed in the "Reject" folder. "Rejects" are deleted from the Detail List. The prospect may enter notes on each listing for the agent to read.

Other links are available to the prospect:
- -Edit the notes written
- -E-mail the listing to a friend
- -Map this property

What the Agent Will See

The agent may access the prospect's personalized Web page from TEMPO's *View Prospect* screen under *Prospect* on the black Navigation Bar.

Columns on the *View Prospect* screen provide the agent with important information.
- -Search Last Run (Date and Time)
- -Last Listing E-mail Sent (Date and Time)
- -Last Client Gateway Access (Date and Time)

If the prospect has accessed the Gateway and flagged listings as Favorites, Possibilities or Rejects, a "New Saved Listings" link will be displayed.

The agent clicks the link and is taken to the agent's view of the Gateway. The agent sees the same information as the prospect, but also sees:
- -A link to "See Agent Report."
- -Properties in each folder, Favorites, Possibilities or Rejects.
- -Notes from the prospect on each property.
- -Rejects are removed from the Detail List. Possibilities and Favorites are marked as such.

PROSPECT MAINTENANCE

From the *View Prospect* screen, the agent may click the prospect's name for maintenance options.

Contact Info

The agent may edit or add information about the prospect and/or extend the expiration date.

Searches/Updates

The agent may revise the custom search criteria, prospect settings or delete/add another search to this prospect.

Comments

The agent may add internal comments about the prospect which the prospect will never see.

Client Gateway

The agent may access the prospect's site from here, change the Home Page Greeting for this prospect or change/update the Tickler Message.

E-mail History

The agent may see the e-mails sent to the prospect by times and dates.

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CMLS
CAROLINA MULTIPLE LISTING SERVICES, INC.

.TeMPO™

QUICK REFERENCE GUIDE FOR CLIENT GATEWAY

CMLS Technical Support
704.940.3159
Fax: 704.940.3120
E-mail: support@carolinahome.com
Web site: http://www.carolinamls.com

Carolina Multiple Listing Services, Inc.
1201 Greenwood Cliff, Suite 200
Charlotte, NC 28204
Phone: 704.372.0911

SETTING PREFERENCES

1. From the black Navigation Bar, click *My Page*.
2. Choose *Preferences* from the list.

Saving Agent Photo

1. Click the *General Preferences* link.
2. Browse and find file location of photo. Select the photo and click "Open."
3. Click "Save."

Saving Broker Logo

Note: Only users with Head Broker and Office Broker permissions can set the broker logo.

1. Click *Broker Preferences*.
2. Browse and find file location of broker logo, select the file and click the "Open" button.
3. Click the "Save" button.

Saving E-mail Preferences

1. Click *E-mail Preferences*.
2. Type signature information into the box provided.
3. Click "Save."

SETTING CLIENT GATEWAY DEFAULTS

1. From the black Navigation Bar, point to *Prospects*, then click *Client Gateway Defaults* from the dropdown box.
2. Check the box next to each item you would like to appear on the left (branding) side of the Client Gateway and then click "Save."
   Note: Once Client Gateway Defaults have been set, they do not need to be changed unless you wish to change fields displayed on all future Client Gateway settings.

SETTING PROSPECT DEFAULTS

When setting the Prospect Defaults, keep in mind how you want to search, what kind of links you want to send and what messages you would like as defaults for most of your prospects.

1. From the black Navigation Bar, point to Prospects, then click Prospect Defaults from the dropdown box.
2. Select the "Yes" or "No" options to allow Reverse Prospecting.
3. Key in the "Default Client Gateway Greeting" that will appear across the top of the Gateway.
4. Key in the default "Initial Notification" subject and message that will be included with the first e-mail to the prospect notifying him or her that a new Client Gateway has been built. Click the "Yes" radio button to include your e-mail signature.
5. Determine how you want to search for most of your prospects. Click "Yes" if you want to use auto-notification. Clicking "No" will assume a manual search.
6. Key in the e-mail message you want to send with the new or changed listings that match your prospect's search criteria. Indicate whether to include your e-mail signature.
7. Indicate whether you want to e-mail a link to the Client Gateway or a link to Property Reports to most of your prospects.
8. If you will select and send specific properties for your prospect as Agent Recommendations, key in a subject and message for those e-mails too.
9. Tickler Messages may be typed, named and e-mailed to prospects monthly, every two weeks, weekly or never.
   Note: A Tickler Message might be a follow-up message to past prospects asking them to keep you in mind if they or any of their friends or neighbors needs your professional services in the future.
10. Prospects will expire, but are not deleted, after a selected number of days. You will receive an e-mail notification in advance of the expiration date if the box is checked.
11. Click "Save."

ADDING A PROSPECT

1. From the Navigation Bar, point to *Prospects*, then click *Add New Prospect* from the dropdown box.
2. Complete the prospect's contact information in the fields provided including the prospect's e-mail address.
3. From the dropdown box choose the number of days before the prospect will expire.
4. If this is a contact only without a search, click the "Save Contact Only" button.
5. If this is a prospect with a search, click the "Save and Continue Prospect Set-up" button.
6. If the search you wish to use already exists, click the "Select an Existing Saved Search" button. OR if you wish you can choose to build a search here by clicking the "Select a Property Type for a New Search" button.
7. Assuming a search has been built, choose the search from the list in the dropdown box and click "Continue."
8. In the description field, key a description of the search criteria and click "Continue."
9. Determine how the search will be run for this prospect: auto-notification or manual search.
10. Check whether you will most often want to send an e-mail link to the Client Gateway or to Property Reports.
11. On the "New Listings Notification Message" screen you can accept the default message or enter the subject and body for a unique e-mail to be sent out to this prospect when new or updated properties are found. Check the "Include Signature" box if desired.
12. If you want e-mails to be saved to the E-mail History file for this prospect check the "Yes" button next to "Save Prospect E-mail History."
13. You may create a Tickler Message, choose one already created or choose to send no Tickler Message to this prospect. Click the "Continue" button.
14. A count of listings that match the search is displayed unless you have chosen fewer days back and clicked "Refresh the Count." You may add or push the listings to the Gateway or choose to add none now. Click the "Continue" button.
15. Key a Client Gateway Home Page Greeting or accept the default shown.
16. You may accept the Gateway Notification Message that appears or change it. Click the "Send a copy to my e-mail" box if desired. Indicate whether to include your signature. You may "Save the Prospect without Sending an E-mail" or "Send E-mail Now."
17. An e-mail confirmation screen will appear that you may print for your file.