USER SET-UP GUIDE

GREENHOUSE

Better Homes and Gardens
REAL ESTATE

Table of Contents

1 Welcome to Greenhouse

This guide is intended for new Greenhouse users. It has step by step instructions for:

- Initial log in and password setup.
- Getting acquainted with your Home Page.
- Activating your Contact Manager, Digital Marketing Center, and Agent Website.
- Setting up alerts.
- Setting up your Email.
- How to sign up for classes in the Learning Management System.
- Adding and importing your contacts into the Contact Manager.

For more information, call BHGRE Client Services at 866 616-4244.

2 Log In Instructions

The Greenhouse web address is http://www.mybhggreenhouse.com.

2.1 Instructions

When logging in for the first time your username is **firstname.lastname**. For example susan.smith

The preset password is **Welcome123!**

After logging in you will be given the option to change the Welcome123! password.

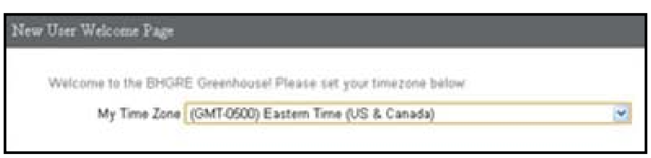
- All passwords must contain a minimum of **eight characters** and contain **at least one upper** and **one lower case letter, one number, one symbol.**

- When entering your personal password remember that passwords are case sensitive.

Click on the **Remember me** checkbox and the next time you log into Greenhouse your new password will fill in automatically after you type in your username.

2.2 Time Zone Setup

After logging in you will be asked to select your time zone from a list of time zones.



3 Home Page

The Home page is divided into sections. The graphic below shows your home page as a new user.

1. At the top of the page are two sets of Tabs and a Search box:
    a. At the very top are links to *Mark (Unmark) As Favorite, Live Chat (Online), Client Services, Profiles, Sign Out*.
    b. *Home, My Business, Marketing, Shopping, Education and Training, Office Documents,* and *News*
2. A *Search* box.
3. On the left are three categories:
    a. The **My Business Dashboard** with *My LeadRouter*, *Listings,* and *My Favorites*
4. In the center are the *Latest Video*, and *Latest News* (*Press Releases* and *Newsletters*).
5. On the right are *Upcoming Events* and *Training* with links to live and recorded classes.

3.1 An Overview of the Tabs

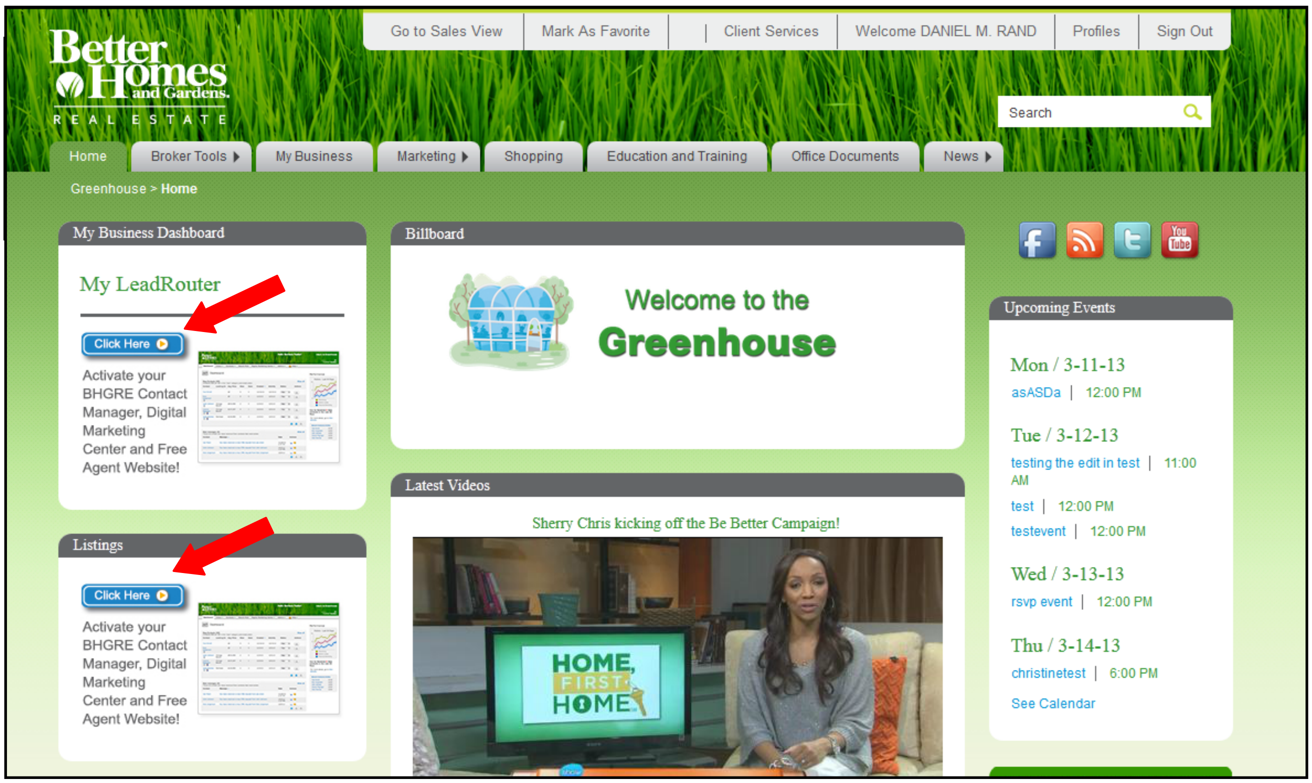
- *My Business*: Find useful tools specific to your business - from your listings and contacts, to listing distribution reports, to referral tools and brand award and recognition levels.
- *Marketing*: Create eye-catching, high-impact, personalized marketing materials … flyers, e-greetings, brochures, home shows, web commercials and more.
- *Shopping*: One-stop-shopping for finding both business and personal purchases. The BHGRE Approved Supplier Program has tools to help you be more successful in real estate.
- *Education and Training*: This Learning Management System holds your transcript, the training calendar, and featured training. There are links to live and self-paced classes.
- *News*: Quick Links to Marketing, Shopping, Press Releases, Events, and Newsletters.

4 Contact Manager

BHGRE has added a new dimension to the Greenhouse, the BHGRE Contact Manager. Manage all your contacts by adding reminders, setting up digital marketing campaigns to stay in touch, plus easy access to your listings to create marketing pieces and single listing websites. Also available are easy to use agent websites.

4.1 Activate Your BHGRE Contact Manager

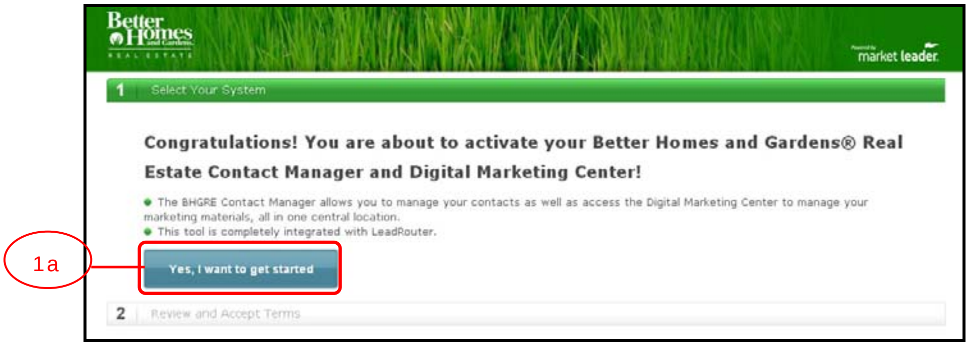
The first time you log in you will be prompted to active your BHGRE Contact Manager, Digital Marketing Center and Agent Website. The link to this process is on the *Home* page in *My Business Dashboard* or *Listings.* Click either. **Click Here** button to begin the process



This brings you into the *BHGRE Contact Manager* system; here you'll begin setting up your Contact Manager and Digital Marketing Center. Follow these steps:

1. Select Your System

   (1a) Click **Yes, I want to get started**

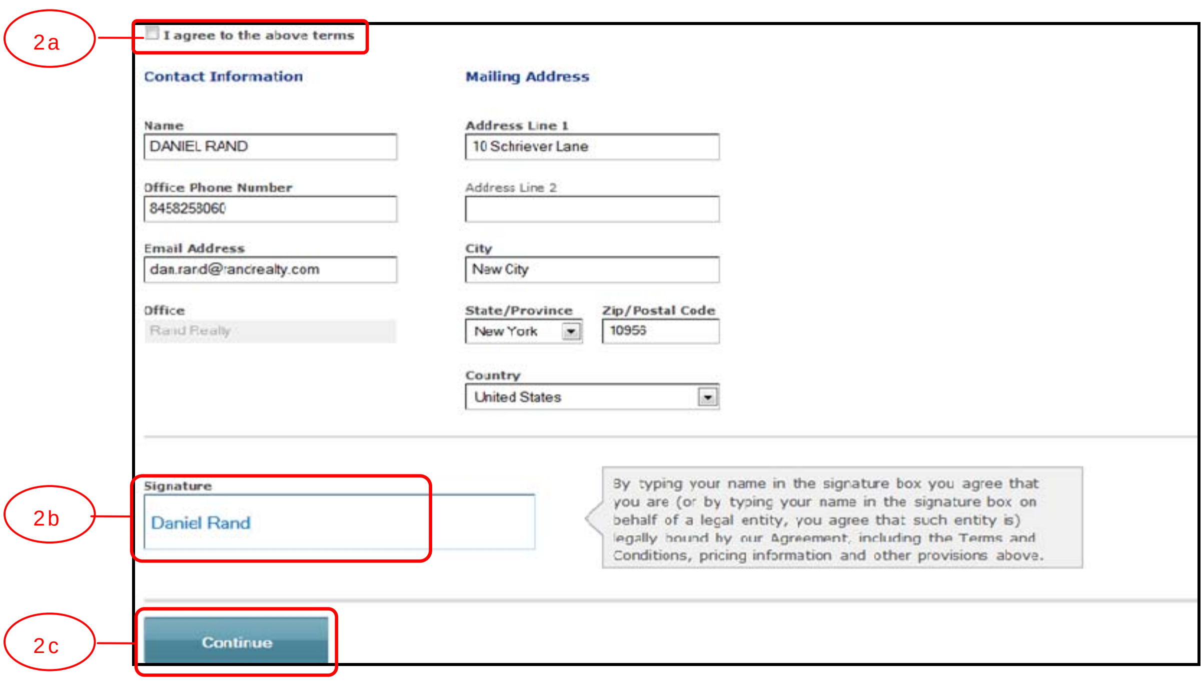


2. Review and Accept Terms:

   (2a) After reading the terms of use, check **I agree to the above terms.**

   (2b) Type your name into the **Signature** box to agree to the Terms and Conditions. It should be **first name** SPACE **last name**. Do not put a dot between your names.

   (2c) Click **Continue**.



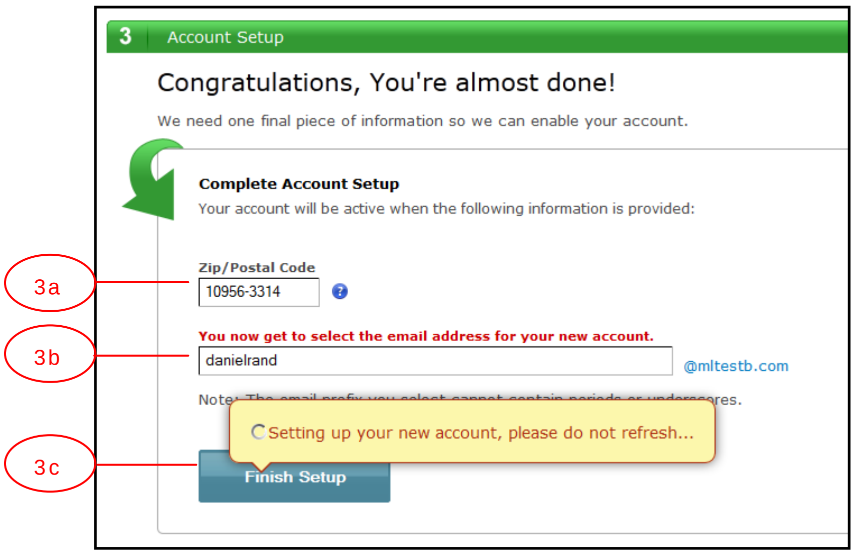
If you receive a message asking you to change the format of your office address select the **Preferred** option.

3. <u>Account Setup</u>

(3a) Fill in your **Zip/Postal Code**.

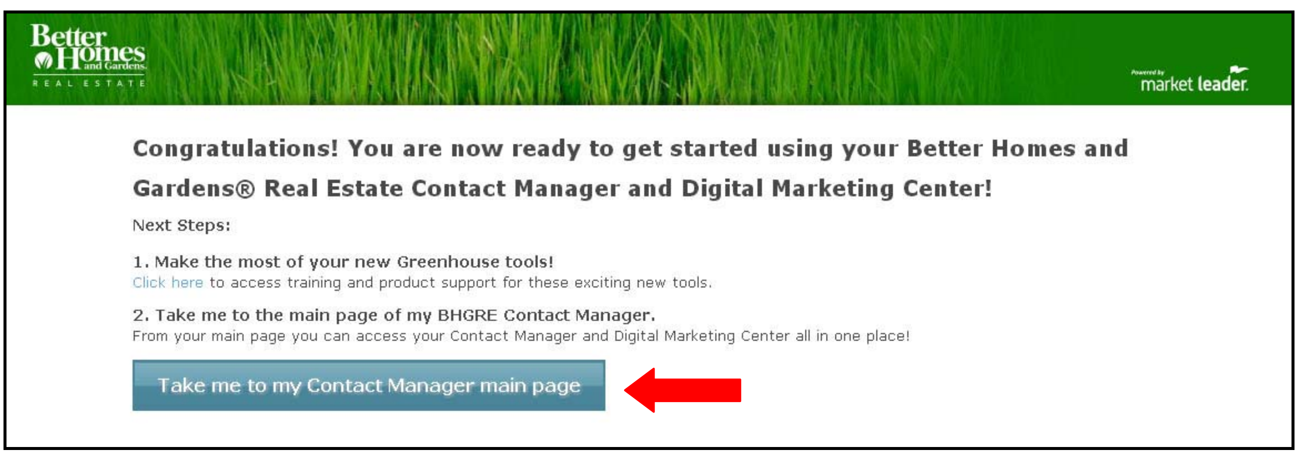
(3b) **Select an email address** for your new Better Homes and Gardens Contact Manager account. You'll still have your broker's email, but this (@betteragents) email is used exclusively for communications in the Contact Manager. The suggested email format is **firstnamelastname**. Example: SueSmith@betteragents.com

(3c) Click **Finish Setup.**

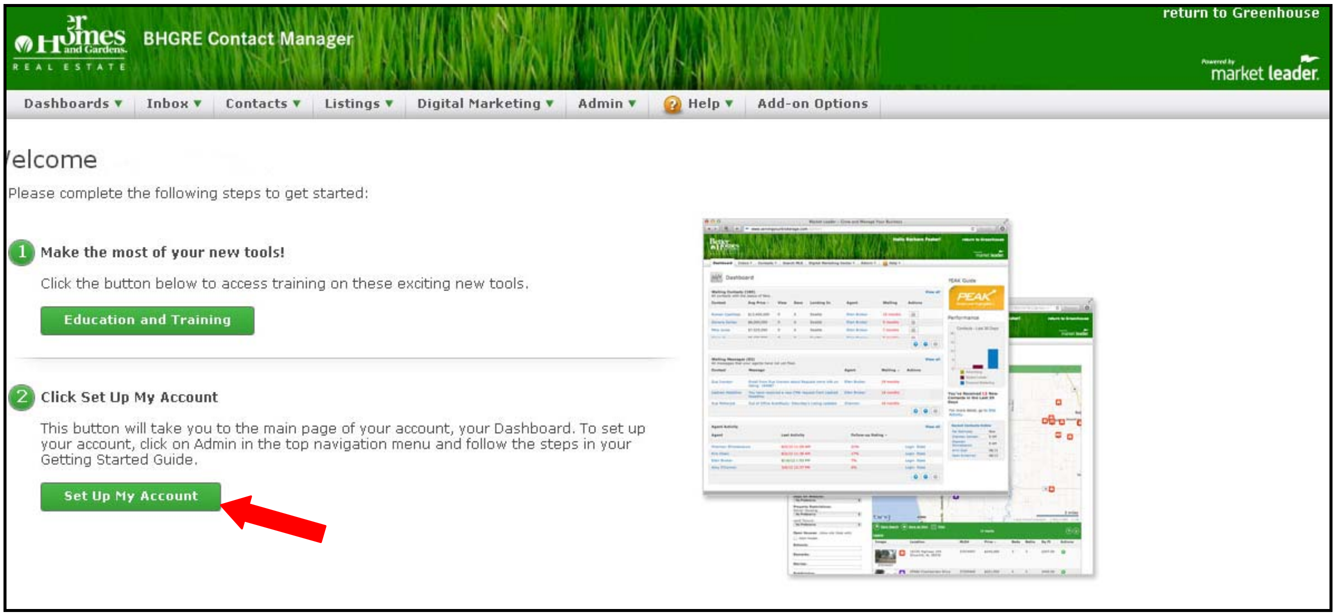


The *Congratulations* screen appears.

1. Click **Take me to my Contact Manager main page**.



2. Next, click **Set Up My Account**

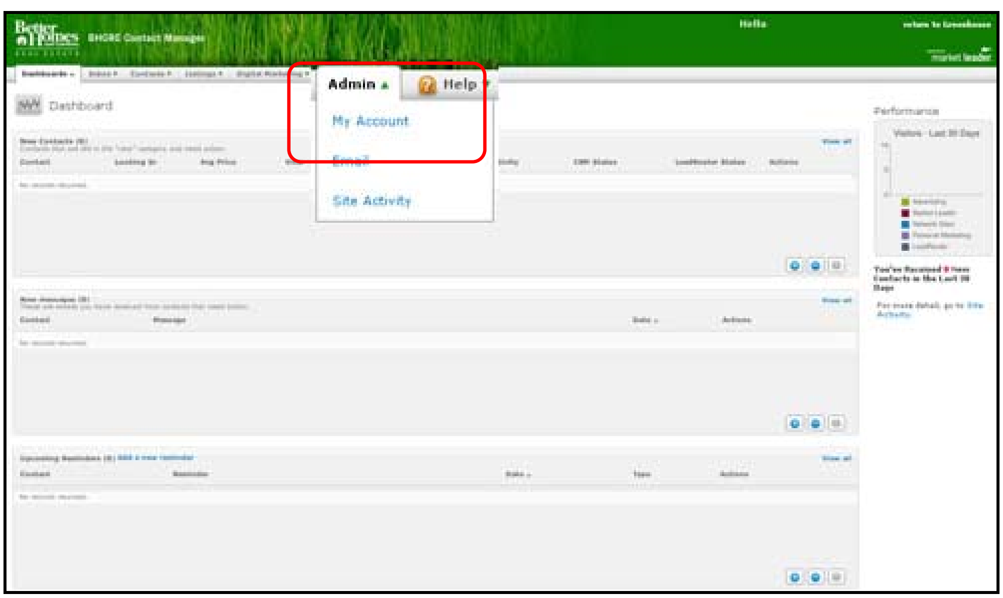


4.2 Add Your Personal Account Information

This brings you to your *Contact Manager Dashboard* where you'll manage all activity within the *Contact Manager*, including the *Digital Marketing Center* and *Campaigns*.

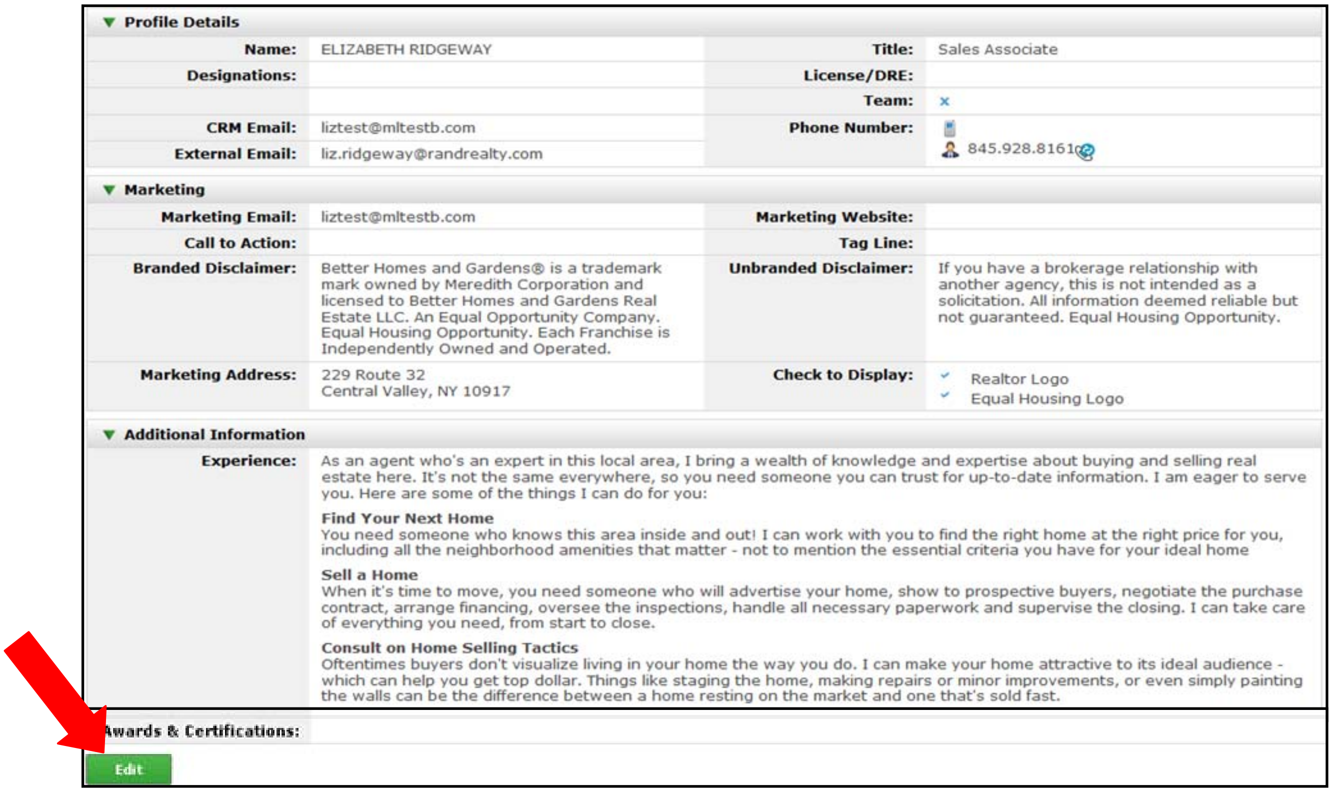
To finish set-up follow these steps:

1. Click on **Admin** from the tabs across the top of the screen.
2. Select **My Account**.

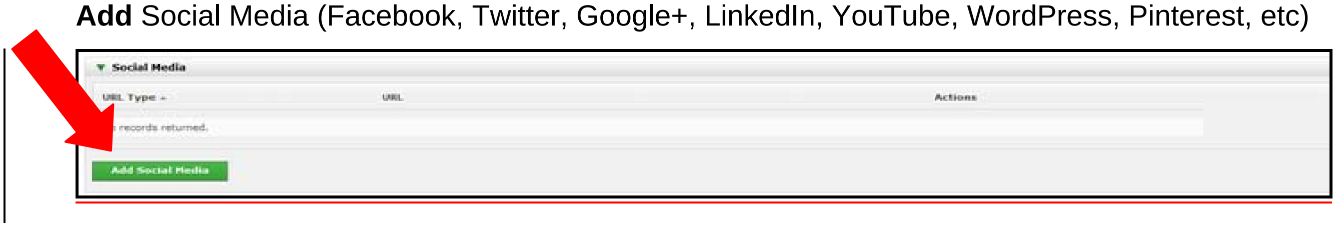


Here in the *Settings* page of *My Account* you are able to edit your personal account information.

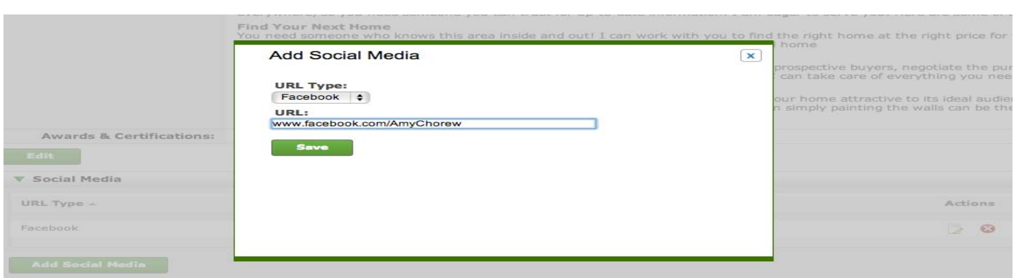
3. Click **Edit** in the middle of the page to edit the *Profile Details, Marketing, Additional Information*, and *Awards/Certifications*. Pay special attention to the Experience Section. Make it personal as it populates your About Page on your website.
4. Click **Save** when you're done**.**



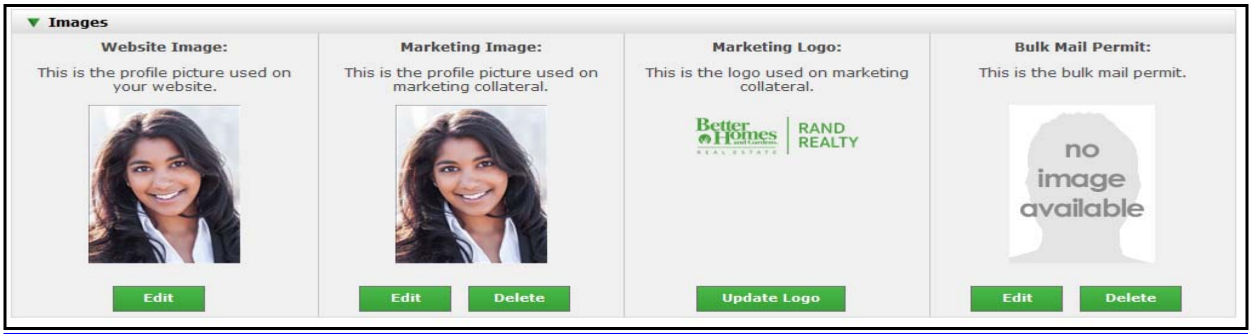
Add Social Media (Facebook, Twitter, Google+, LinkedIn, YouTube, WordPress, Pinterest, etc)



Click Add Social Media, bring your site from the dropdown and put in your personal URL for that site. Click **Save**.



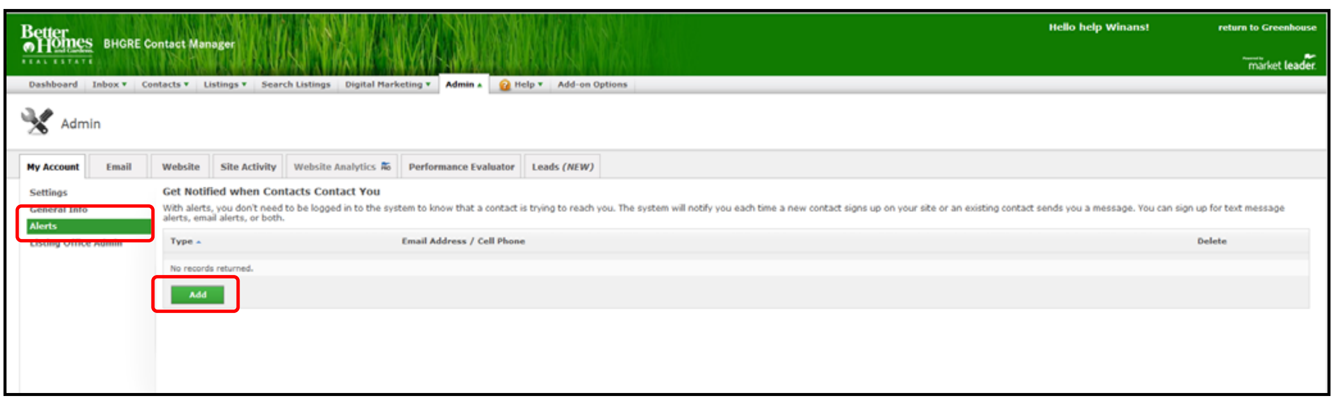
Upload your photo in the *Images* section; add your photo to ***Website Image***, and ***Marketing Image****.* Additionally there are links to add your *Marketing Logo* and *Bulk Mail Permit.* By clicking on **Update Logo**, your company logo will appear.



4.3 Set Up Alerts

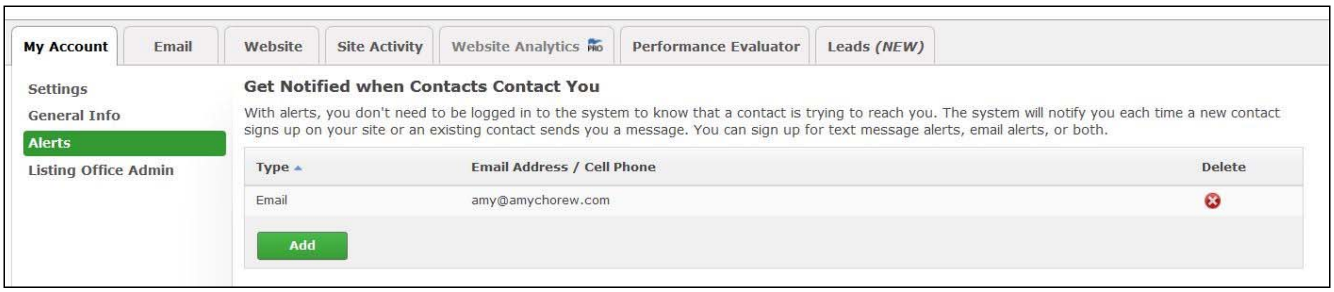
When contacts send you messages in the *Contact Manager* you have the option to be notified that you have a new message by email or by text. The text message informs you of the message. The email informs you of the message and provides a link to log in to the *Contact Manager* so you can respond quickly. To set up your alerts, follow these steps:

1. Select the **Admin** tab and the **My Account** category.
2. Click **Alerts** from the menu on the left-hand side.
3. Click **Add**.



1. Enter your **cell phone number, choose your carrier** AND/OR **enter your email address**

and click **Add.**



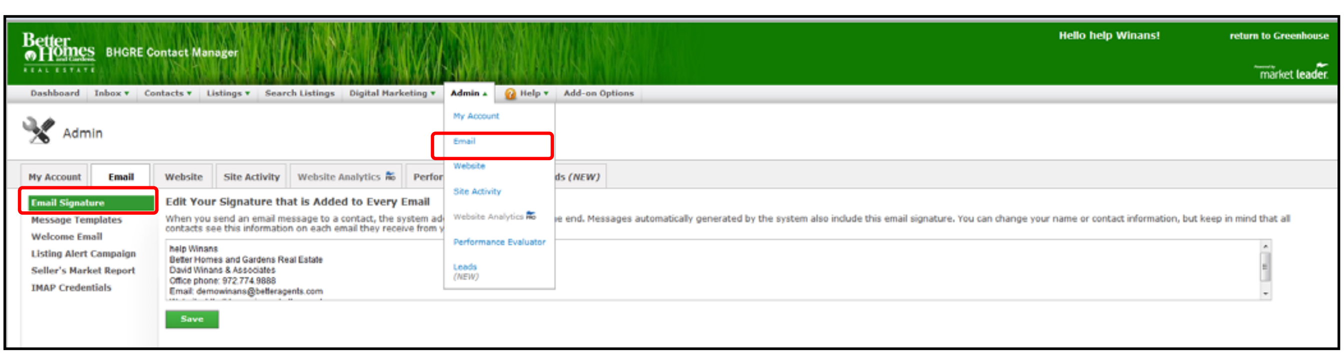
4.4 Edit Your Email

To set up your Email account, follow these steps:

1. Click on the **Admin** tab and then select **Email**.

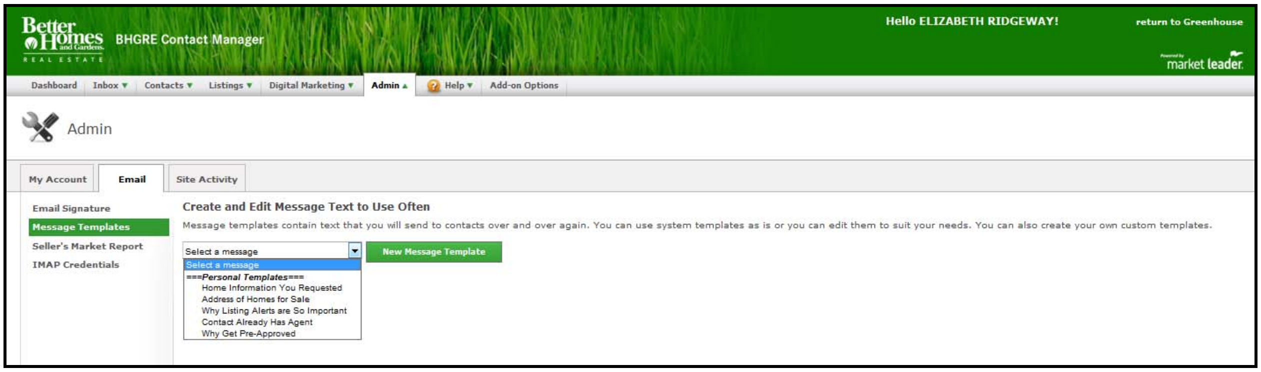
Email Signature - Your email signature has been created for you with your information. This signature will appear when you send emails out from the system. Please check it and make sure it is accurate.

2. To edit or personalize your signature, select **Email Signature** from the left hand side.
3. Edit the information in the textbox.
4. When you are finished, click **Save**.

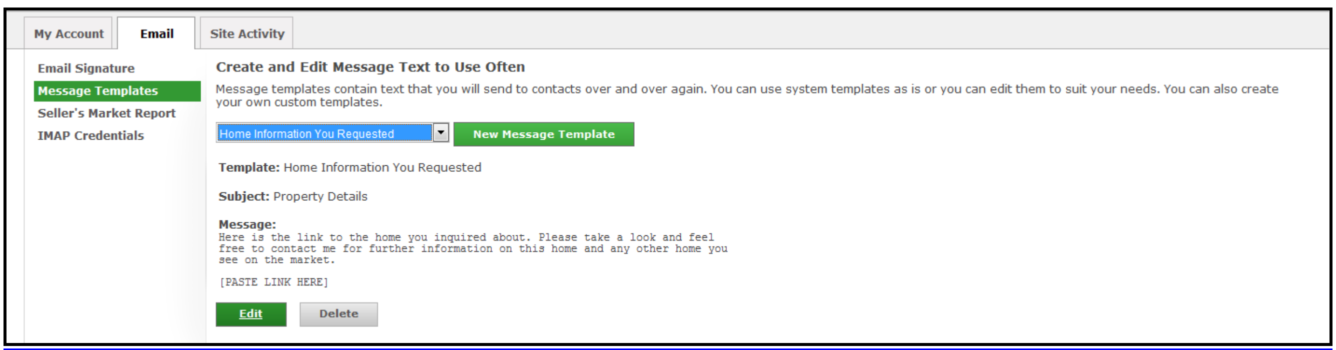


4.5 Message Templates

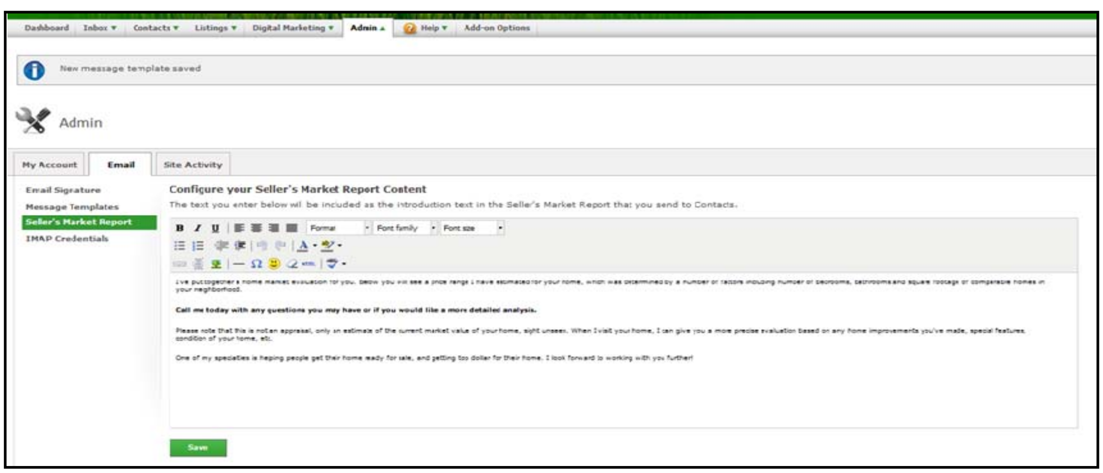
Message templates are commonly sent emails that you can create to automatically populate an email. Review and edit existing templates - create your own! Add template emails to send out on a regular basis.



The graphic below is an example of a template.

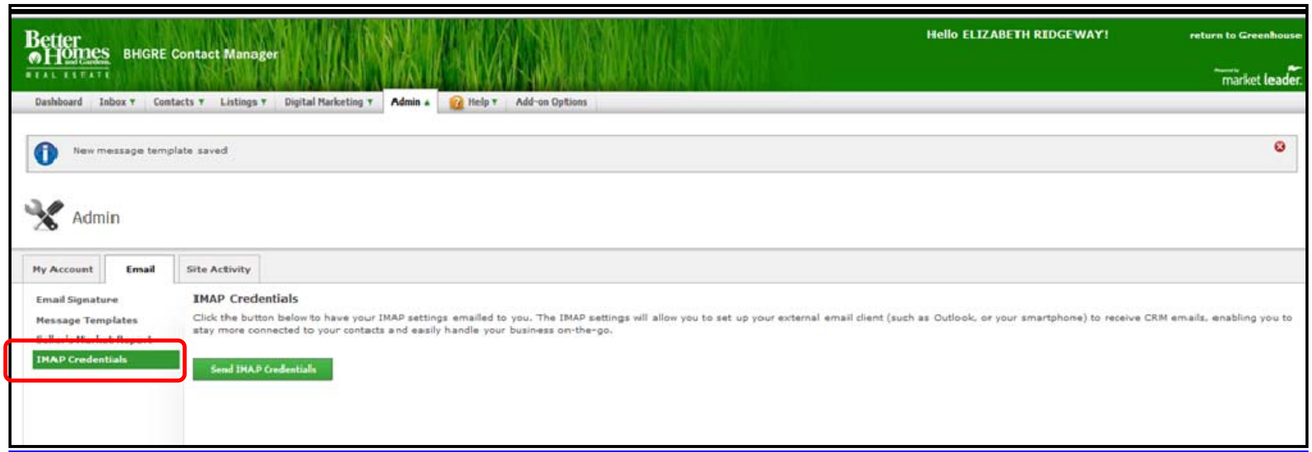


Review all the templates to make sure the content works for your business and edit them appropriately with the text editor provided.

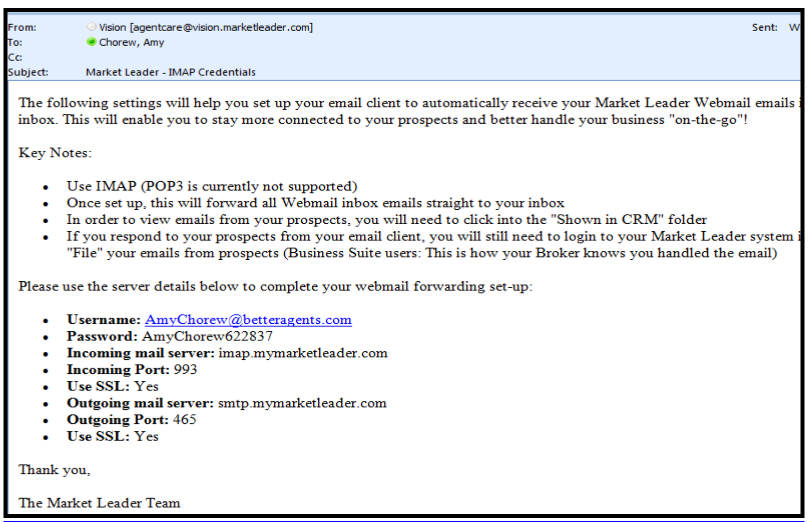


4.6 Add an Email account on your smart phone

To add an email account on your smart phone, click the **Admin** tab, select the **Email** category, the select **IMAP Credentials** on the left side**.**



Instructions similar to the graphic below will be emailed to you. After setup your BetterAgents email will be available on your smartphone as pictured here. For further instruction, contact client services.



From: Vision [agentcare@vision.marketleader.com] Sent: W
To: Chorew, Amy
Cc:
Subject: Market Leader - IMAP Credentials

The following settings will help you set up your email client to automatically receive your Market Leader Webmail emails i inbox. This will enable you to stay more connected to your prospects and better handle your business "on-the-go"!

Key Notes:

- Use IMAP (POP3 is currently not supported)
- Once set up, this will forward all Webmail inbox emails straight to your inbox
- In order to view emails from your prospects, you will need to click into the "Shown in CRM" folder
- If you respond to your prospects from your email client, you will still need to login to your Market Leader system i "File" your emails from prospects (Business Suite users: This is how your Broker knows you handled the email)

Please use the server details below to complete your webmail forwarding set-up:

- **Username:** AmyChorew@betteragents.com
- **Password:** AmyChorew622837
- **Incoming mail server:** imap.mymarketleader.com
- **Incoming Port:** 993
- **Use SSL:** Yes
- **Outgoing mail server:** smtp.mymarketleader.com
- **Outgoing Port:** 465
- **Use SSL:** Yes

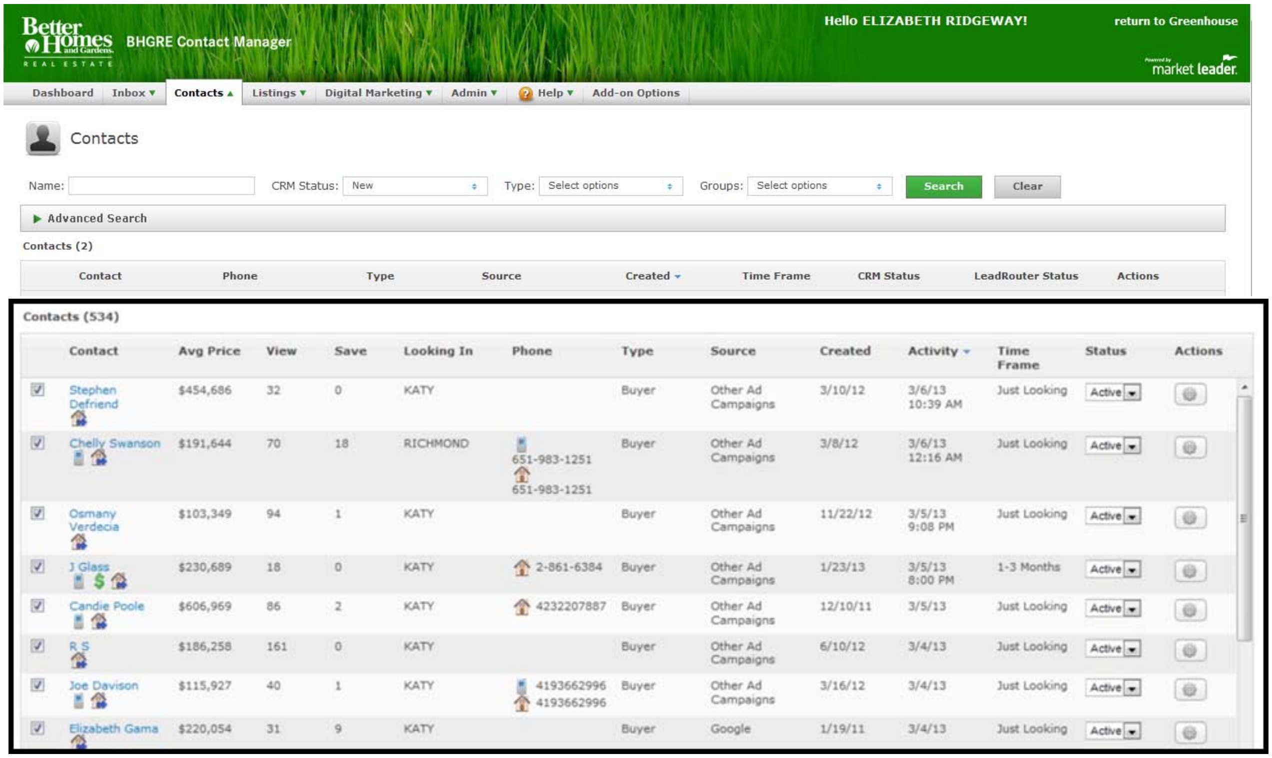
Thank you,

The Market Leader Team

4.7 Contacts

To see all your contacts please click on **Contacts**, **All contacts.**

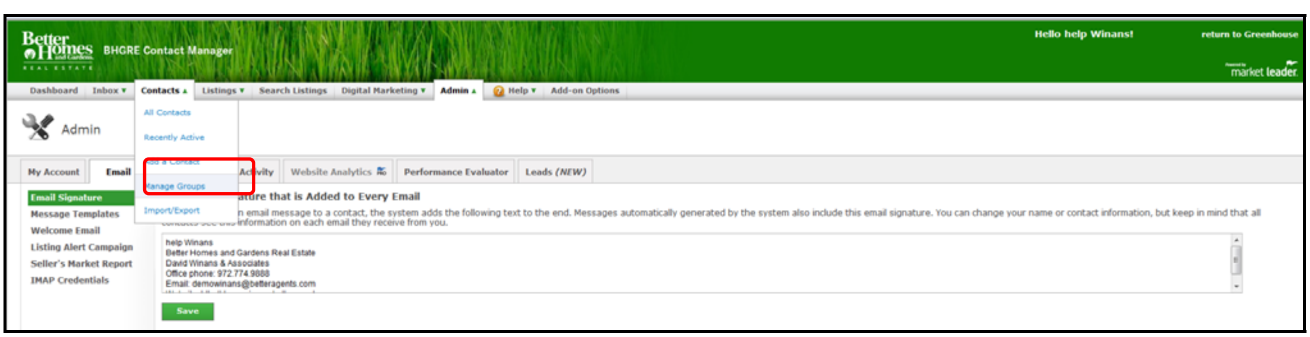
There are different ways to search for a contact; they are impacted by the way you enter the contact so consider using the CRM status types which are preset. The Groups are sub-types that you can create yourself.



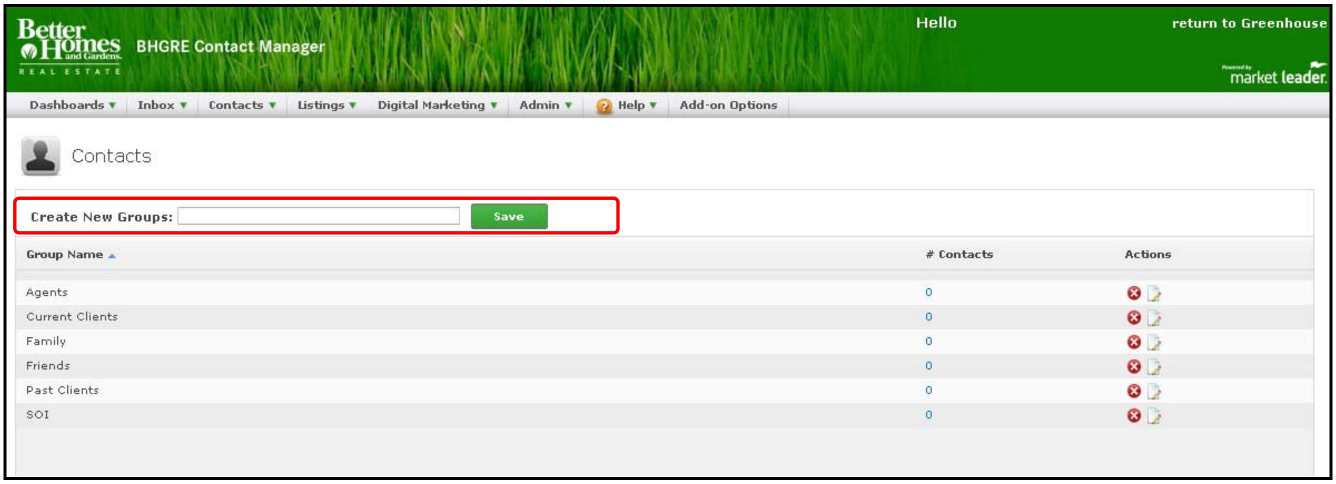
4.8 Organize Your Contacts into Groups.

Within the *Contact Manager*, you have the ability to organize your contacts into *Groups*. This feature enables you to easily send *digital marketing pieces* and *campaigns* to your contacts. Create as many *Groups* as you need in order to organize your contacts. To set up your Groups:

1. Select **Manage Groups** from the **Contacts** tab.



2. **Add a group name** and click **Save**



4.9 Import Your Contacts

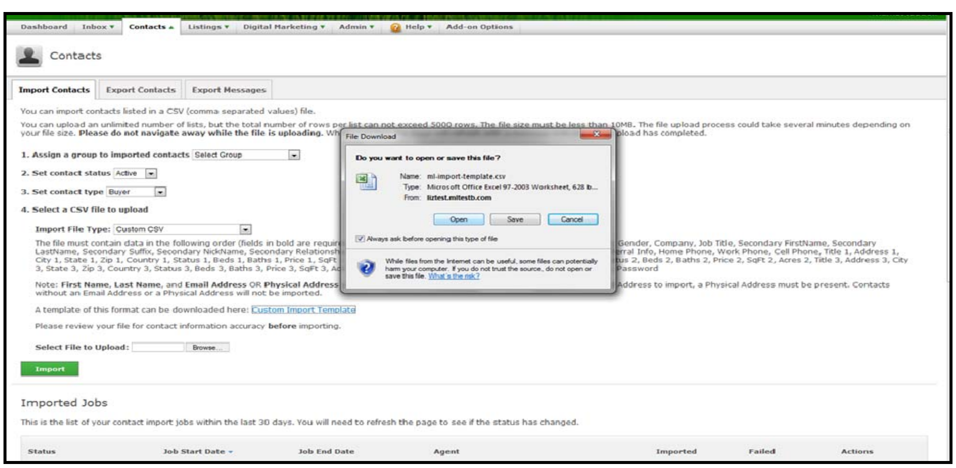
Contacts will come into your CRM from your *LeadRouter* account and your BHGRE website, but you can also import contacts that you now have. You can import 5,000 names per file and multiple files per day. **Note**: For more detailed instructions on importing contacts, make sure to visit the *Greenhouse Tip Sheets* section located on the *Home* page of the Greenhouse.

1. Select **Import/Export** from the **Contacts** tab

The *Contact Manager* requires the use of a specific template for importing your contacts. Before you can upload any contacts, you MUST download the template.

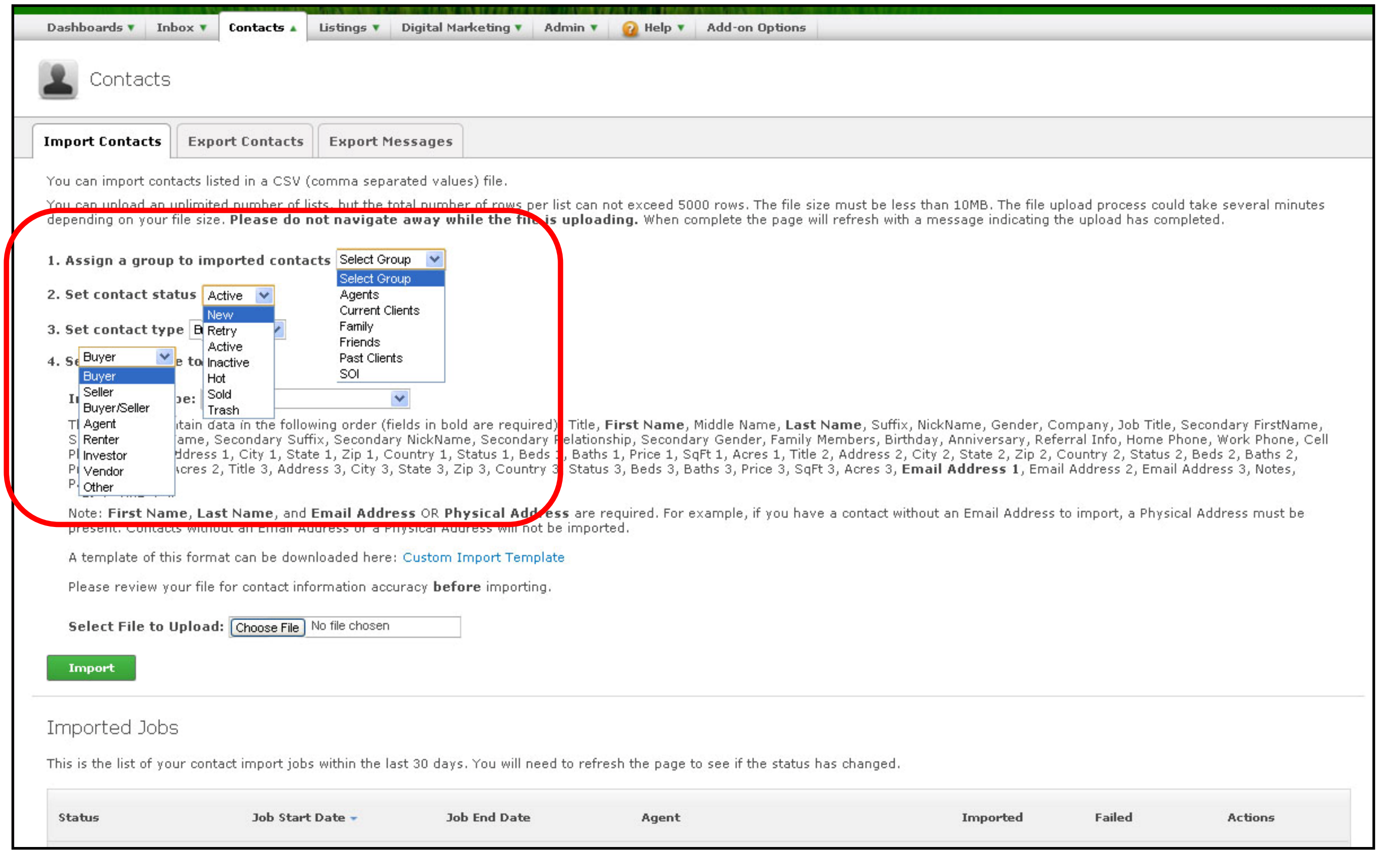
If you are going to import an excel spreadsheet you must use the template provided.

1. Click on the link and download the file.

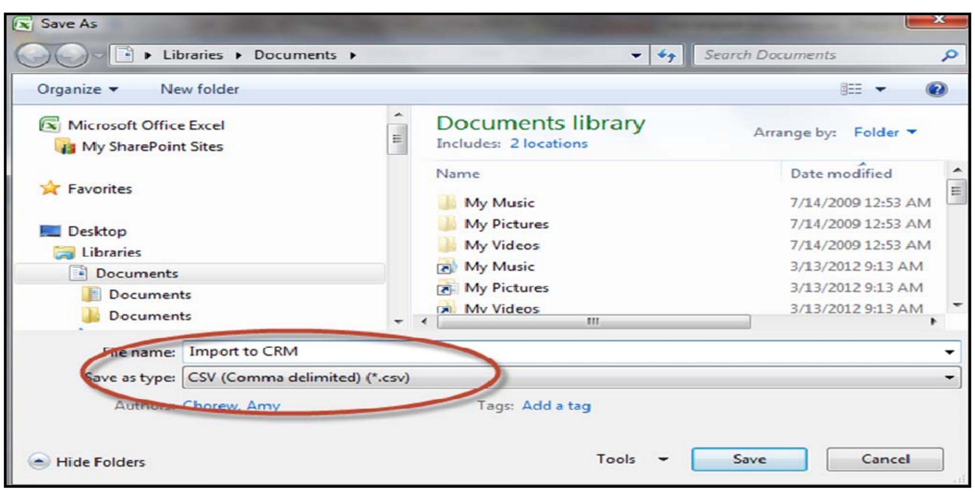


When creating your spreadsheet for uploading, you are only required to input **<u>First Name</u>**, **<u>Last Name</u>**, and **<u>Email Address 1</u>** or **<u>Street address</u>**.

1. **DO NOT add, move** or **delete any of columns** or your information will not upload properly. Make sure you have **at least five rows completed**. You can **copy and paste your own content into the template.**
2. Save the spreadsheet in a **CSV format**.
3. Return to the **Import Contacts** tab of the **Contact Manager**.
4. To import the excel file, select the group, make it active, and choose the type of contact

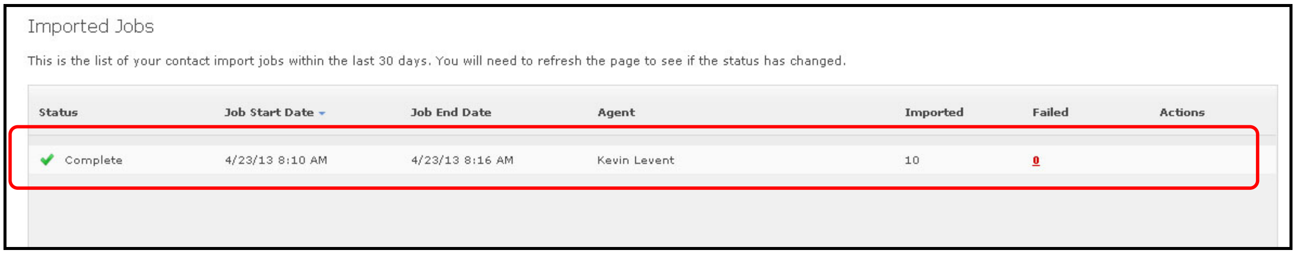


5. Click browse and find the excel spreadsheet that you had downloaded and populated. Save as a Comma Delimited file in the save as type.



6. Click **Import.**

7. The importing process takes about 5 minutes. Once the contacts are imported, the job appears in the **Imported Jobs** section.

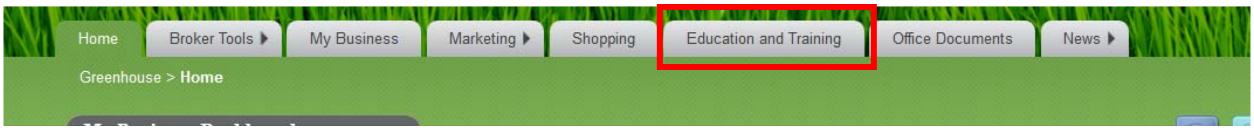


8. Continue uploading contacts for each Group you created.

If you want to import contacts from Top Producer 8i or Outlook 2007, please visit the *Home* page and download a *Tip Sheet* or call Client Services.

5 Education and Training

The Education and Training page is where you will find all of the training classes, recorded training , training materials and videos. This page houses a lot of what is on the Skills page of the existing Greenhouse.

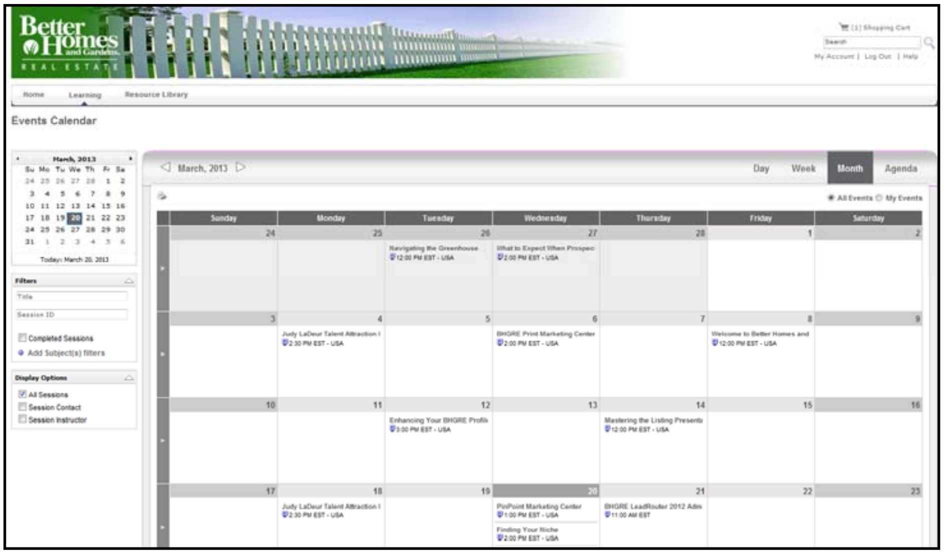


Below is the Learning Management System *Home* page. .

5.1 LMS Training Class Calendar

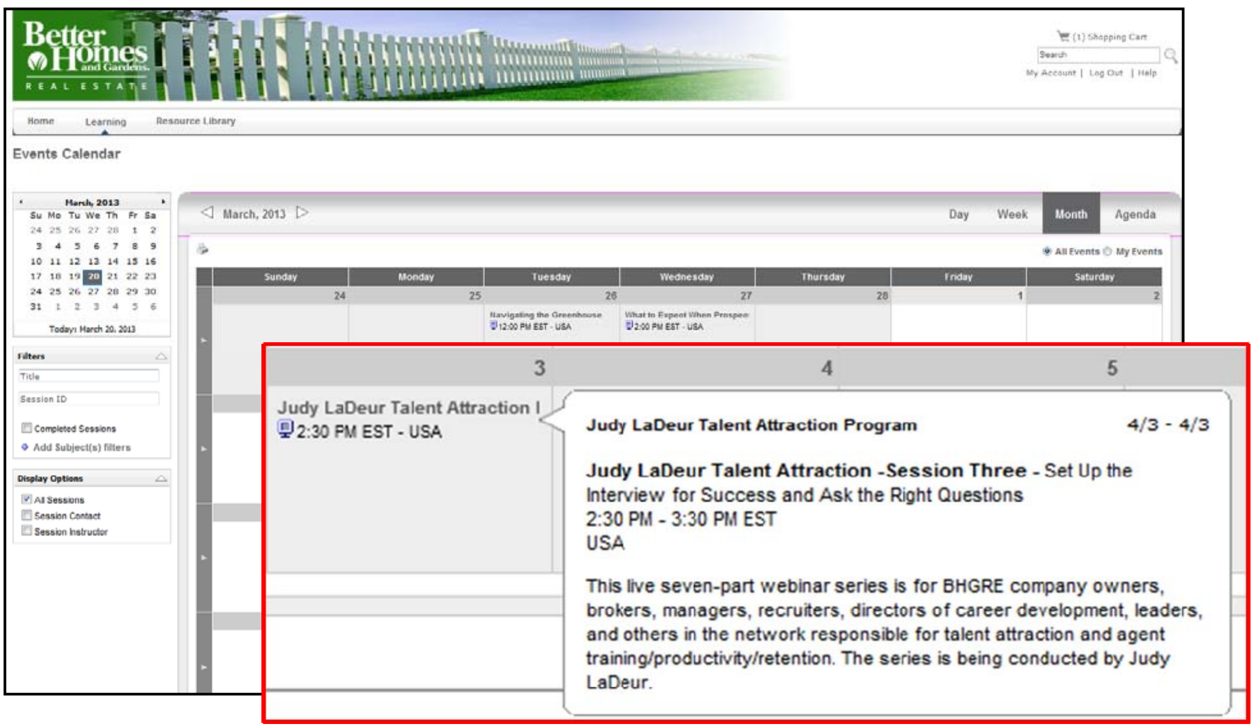
Here you will find and register for all of the BHGRE training classes. You will find this calendar on the Education and Training page of the New Greenhouse. You are able to click the name of the class to register and add the classes to your transcript.

5.2 How to Register for a Class

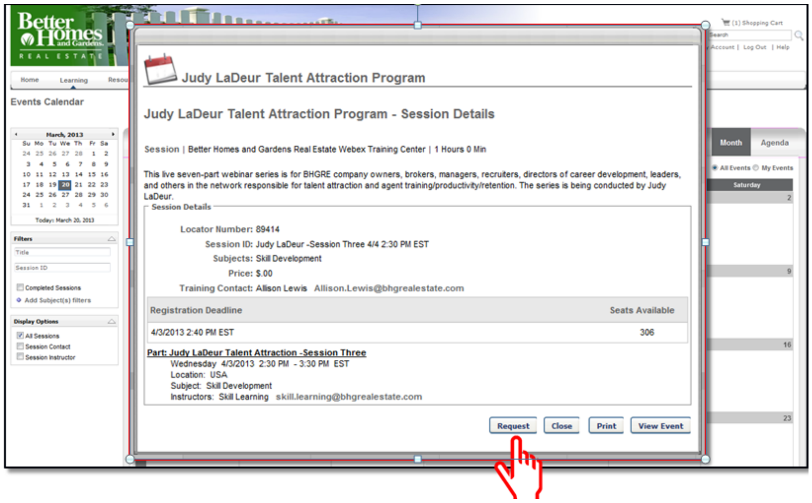


Register for a class on the LMS Training Calendar. To rregister for a class:

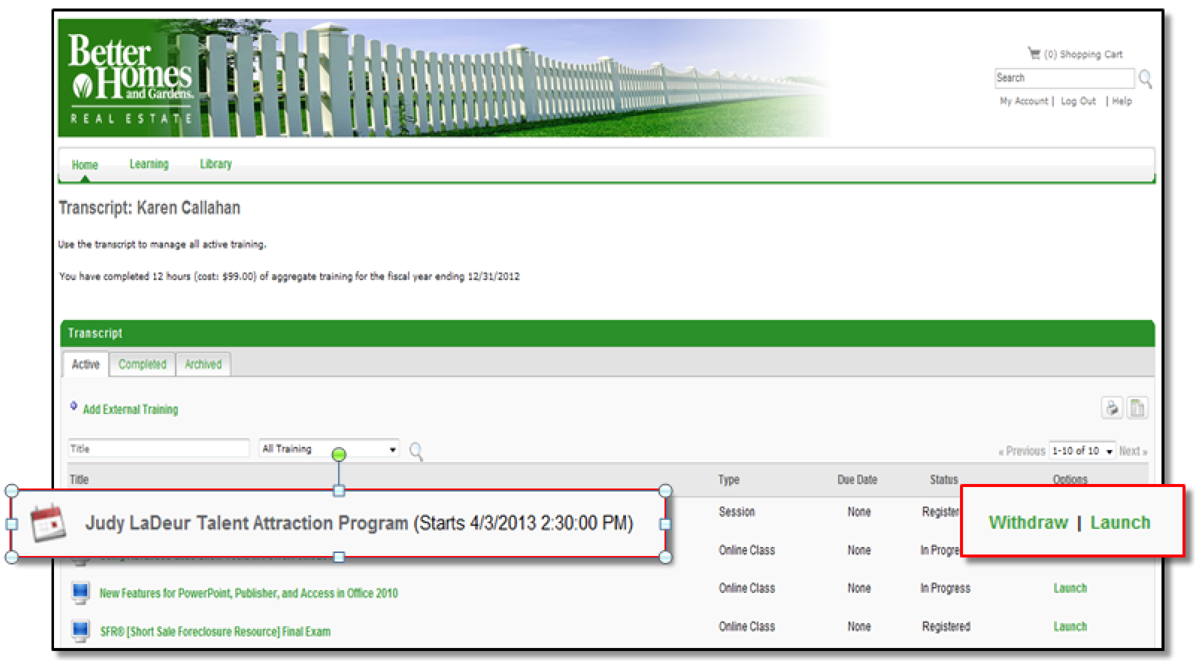
1. **Locate the class** you would like to attend
2. **Hover over the class** to view the additional details about the class.
3. If you would like to register for the class, **click the title**. This will open details page.



4. From the **details page** you can **REQUEST** (same as REGISTER) the class. It is now added to your transcript.



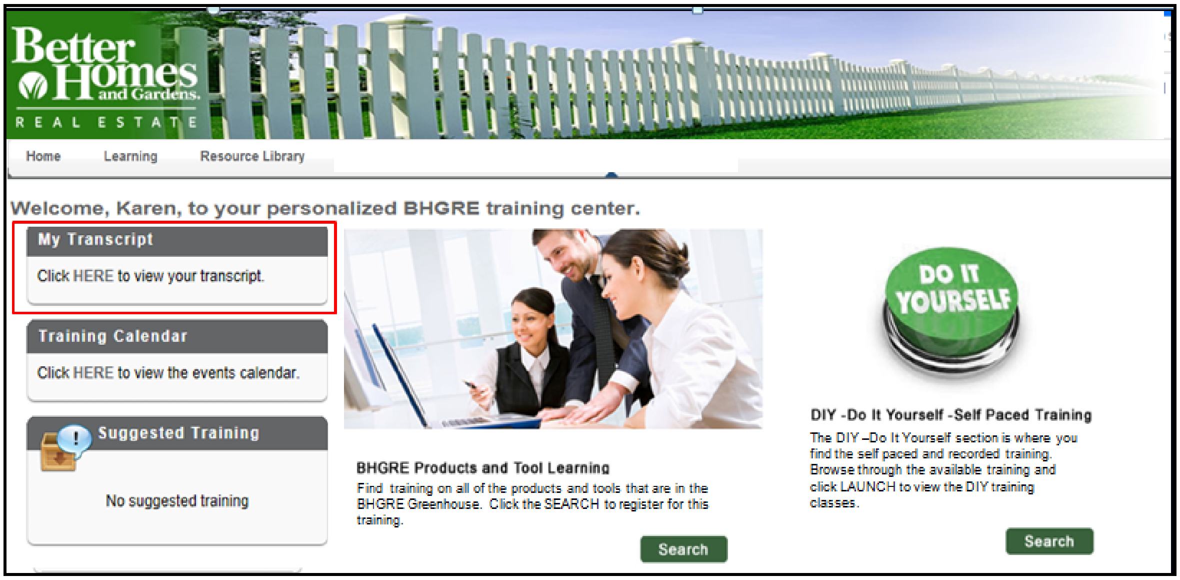
Once you are registered, your transcript page will open and you will see the class that you are ready to attend. You have two options for this class. You can click **withdraw** if you are unable to attend, or you can click **Launch** to attend the class.



You will get an email to let you know you have been successfully registered for the class. There may be a delay from the time you register to when you receive the email.

5.3 How to Attend a Class

Starting on the Education and Training page, **click the My Transcript link**.



At the time of the class, go to back into your transcript page. You will see the class that you are ready to attend. You have two options for this class. You can click **withdraw** if you are unable to attend, or you can click **Launch** to attend the class.

NOTE: you can't launch the class more than 1 hour before the scheduled time of the class. Example: if the class is at 12:00, you can't get in any earlier than 11:00.