
USER SET-UP GUIDE

GREENHOUSE



Table of Contents

1	WELCOME TO GREENHOUSE	2
2	FIRST TIME LOG IN	3
3	YOUR HOME PAGE	4
3.1	KEY FEATURES	5
4	CONTACT MANAGER.....	6-8
4.1	ACTIVTE YOUR CONTACT MANAGER	9-10
4.2	ADD PERSONAL INFORMATION	10
4.3	SET UP ALERTS.....	11
4.4	EDIT EMAIL	12
4.5	MESSAGE TEMPLATES	13
4.6	SMART PHONES	14
4.7	CONTACTS	15
4.8	ADDING CONTACTS.....	16
4.9	IMPORT CONTACTS.....	16-18
5	EDUCATION AND TRAINING	19-22

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

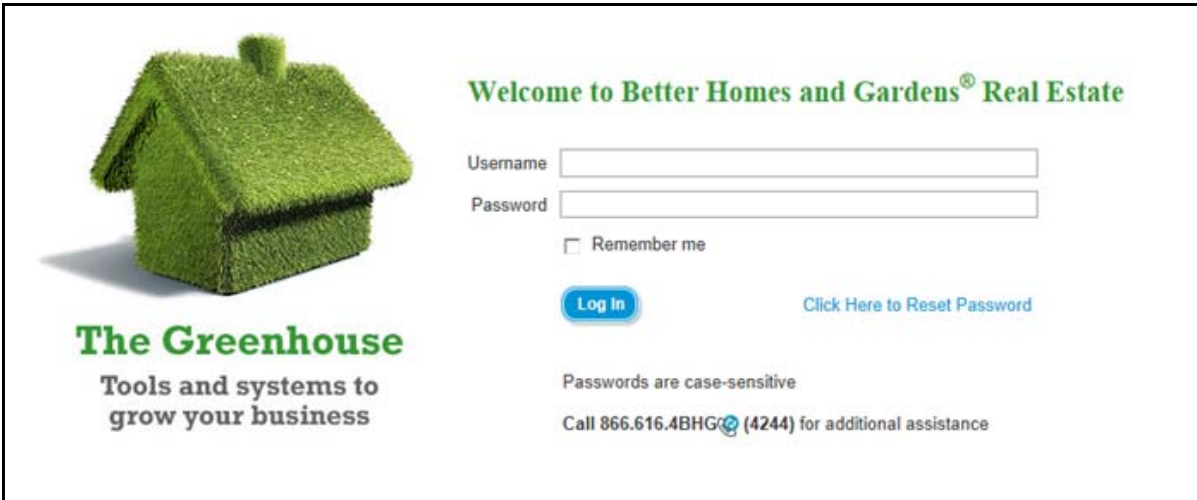
When logging in for the first time your username is **firstname.lastname**. For example susan.smith

The preset password is **Welcome123!**

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

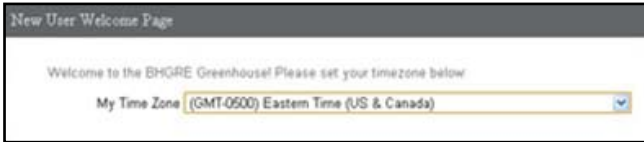
- All passwords must contain a minimum of **eight characters** and contain **at least one upper** and **one lower case letter, one number, one symbol**.
- When entering your personal password remember that passwords are case sensitive.

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.

A screenshot of the login page for 'The Greenhouse' by Better Homes and Gardens Real Estate. On the left is a logo featuring a green grassy house with the text 'The Greenhouse' and 'Tools and systems to grow your business'. On the right, the heading 'Welcome to Better Homes and Gardens® Real Estate' is displayed. Below this are input fields for 'Username' and 'Password', a 'Remember me' checkbox, a blue 'Log In' button, and a link 'Click Here to Reset Password'. At the bottom, it states 'Passwords are case-sensitive' and provides a phone number 'Call 866.616.4BHG (4244) for additional assistance'.

2.2 Time Zone Setup

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

A screenshot of the 'New User Welcome Page' showing a time zone selection dropdown menu. The text 'Welcome to the BHGRE Greenhouse! Please set your timezone below' is at the top. The dropdown menu is labeled 'My Time Zone' and currently shows '(GMT-0500) Eastern Time (US & Canada)'.

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

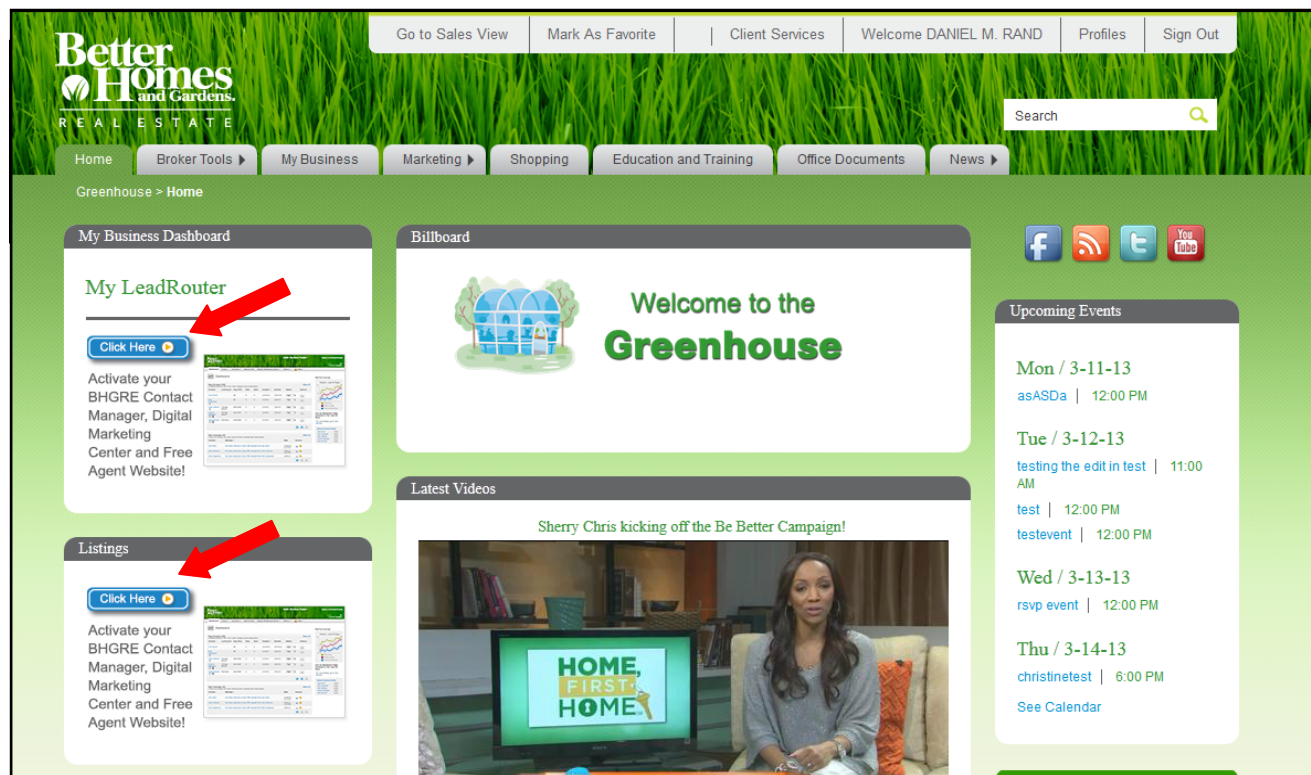
- *My Business*: Find useful tools specific to your business - from your listings and contacts, to listing distribution reports, to referral tools and brand award and recognition levels.
- *Marketing*: Create eye-catching, high-impact, personalized marketing materials ... flyers, e-greetings, brochures, 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 activate 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**

1a

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**.

2a

2b

2c

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

3. Account Setup

(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**

return to Greenhouse

Powered by market leader.

Dashboards ▾ Inbox ▾ Contacts ▾ Listings ▾ Digital Marketing ▾ Admin ▾ Help ▾ Add-on Options

Welcome

Please complete the following steps to get started:

- 1 Make the most of your new tools!**
Click the button below to access training on these exciting new tools.
[Education and Training](#)
- 2 Click Set Up My Account**
This button will take you to the main page of your account, your Dashboard. To set up your account, click on Admin in the top navigation menu and follow the steps in your Getting Started Guide.
[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**.

return to Greenhouse

Powered by market leader.

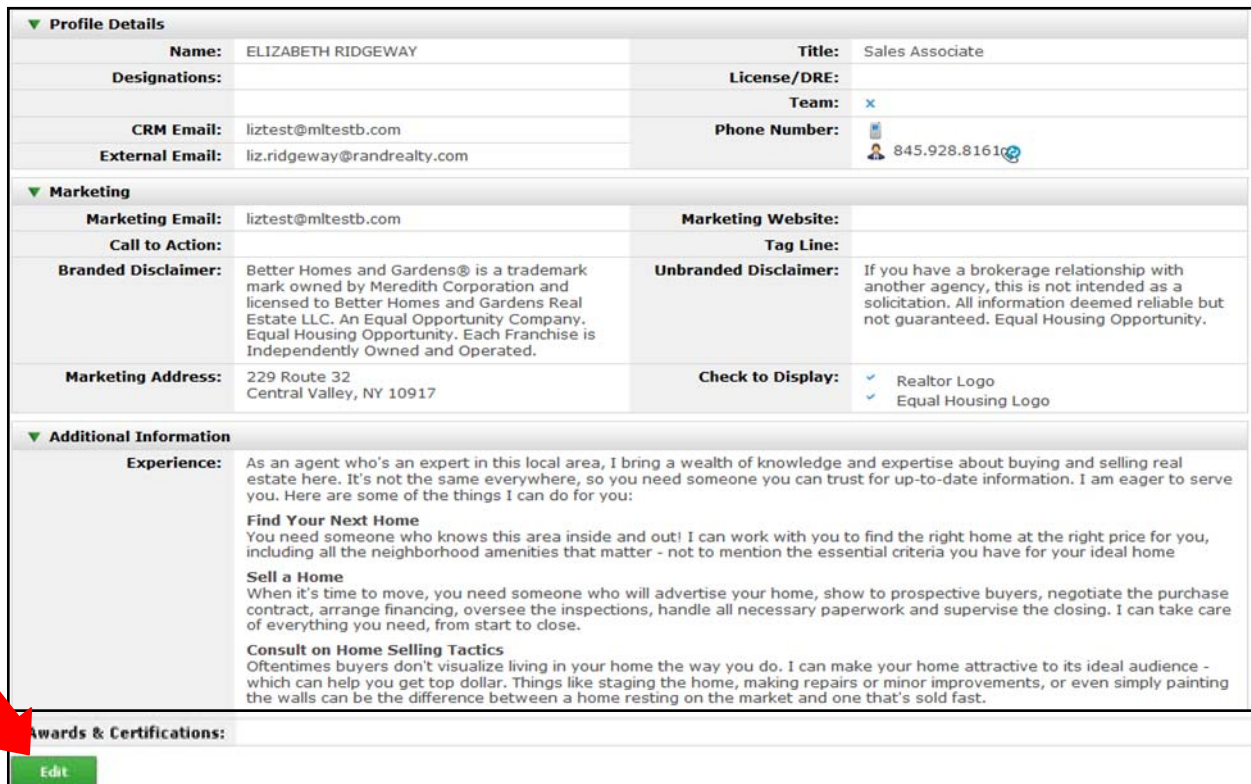
Dashboards ▾ Inbox ▾ Contacts ▾ Listings ▾ Digital Marketing ▾ Admin ▾ Help ▾ Add-on Options

Admin ▾ Help ▾

- My Account
- Email
- Site Activity

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.



▼ Profile Details

Name:	ELIZABETH RIDGEWAY	Title:	Sales Associate
Designations:		License/DRE:	
CRM Email:	liztest@mltestb.com	Team:	x
External Email:	liz.ridgeWAY@randrealty.com	Phone Number:	845.928.8161

▼ Marketing

Marketing Email:	liztest@mltestb.com	Marketing Website:	
Call to Action:		Tag Line:	
Branded Disclaimer:	Better Homes and Gardens® is a trademark mark owned by Meredith Corporation and licensed to Better Homes and Gardens Real Estate LLC. An Equal Opportunity Company. Equal Housing Opportunity. Each Franchise is Independently Owned and Operated.	Unbranded Disclaimer:	If you have a brokerage relationship with another agency, this is not intended as a solicitation. All information deemed reliable but not guaranteed. Equal Housing Opportunity.
Marketing Address:	229 Route 32 Central Valley, NY 10917	Check to Display:	<input checked="" type="checkbox"/> Realtor Logo <input checked="" type="checkbox"/> Equal Housing Logo

▼ Additional Information

Experience: As an agent who's an expert in this local area, I bring a wealth of knowledge and expertise about buying and selling real estate here. It's not the same everywhere, so you need someone you can trust for up-to-date information. I am eager to serve you. Here are some of the things I can do for you:

Find Your Next Home
You need someone who knows this area inside and out! I can work with you to find the right home at the right price for you, including all the neighborhood amenities that matter - not to mention the essential criteria you have for your ideal home

Sell a Home
When it's time to move, you need someone who will advertise your home, show to prospective buyers, negotiate the purchase contract, arrange financing, oversee the inspections, handle all necessary paperwork and supervise the closing. I can take care of everything you need, from start to close.

Consult on Home Selling Tactics
Oftentimes buyers don't visualize living in your home the way you do. I can make your home attractive to its ideal audience - which can help you get top dollar. Things like staging the home, making repairs or minor improvements, or even simply painting the walls can be the difference between a home resting on the market and one that's sold fast.

Awards & Certifications:

Edit

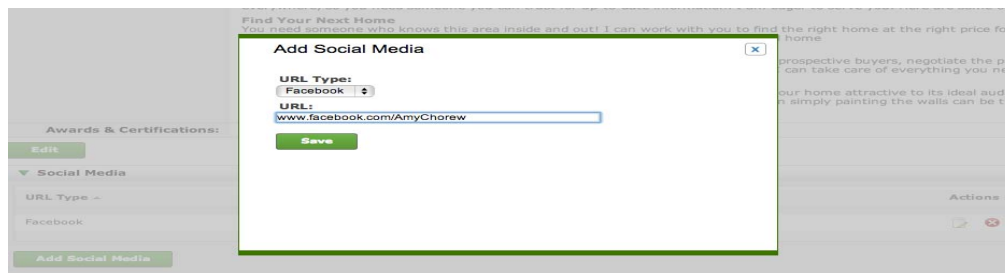
Add Social Media (Facebook, Twitter, Google+, LinkedIn, YouTube, WordPress, Pinterest, etc)



▼ Social Media

URL Type	URL	Actions
0 records returned.		
Add Social Media		

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



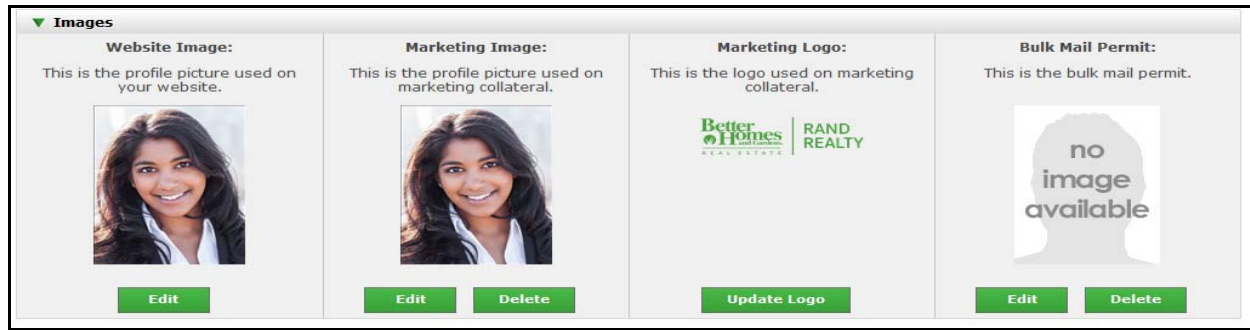
Add Social Media

URL Type: **Facebook**

URL:

Save

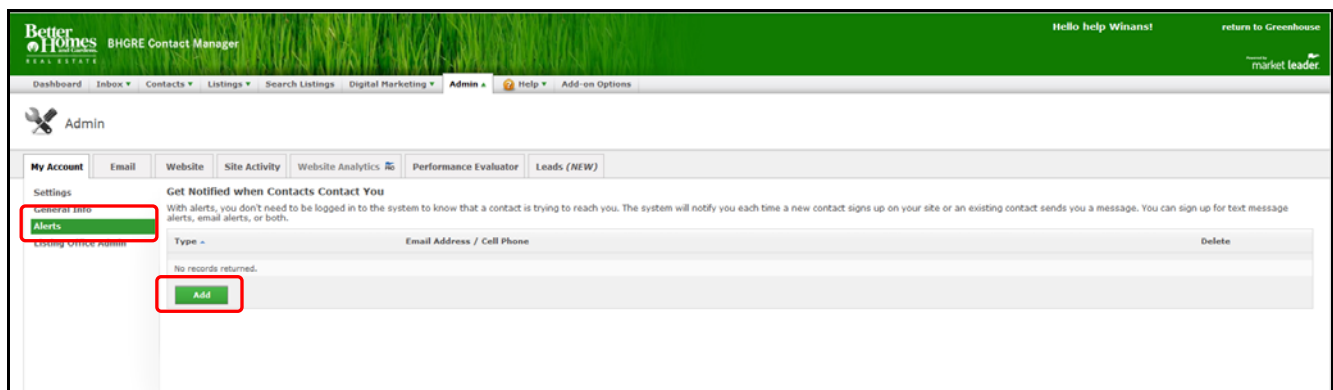
Upload your photo in the *Images* section; add your photo to **Website Image**, and **Marketing Image**. Additionally there are links to add your *Marketing Logo* and *Bulk Mail Permit*. By clicking on **Update Logo**, your company logo will appear.



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**.

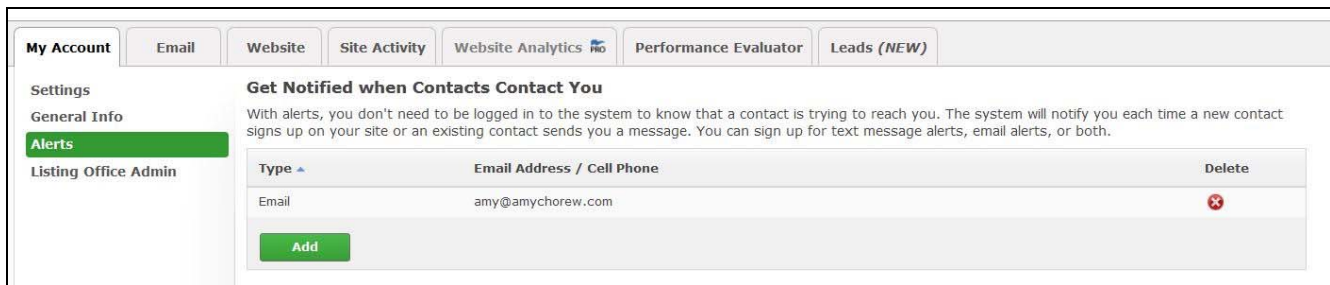


1. Enter your **cell phone number**, choose your carrier AND/OR enter your email address



The 'Add Alert' form is divided into two sections: 'Text Message Alerts' and 'Email Alerts'. In the 'Text Message Alerts' section, there is a 'Cell phone number:' text box and a 'Cell phone carrier:' dropdown menu. Below these is a note: 'Enter your 10-digit cell phone number with no spaces or dashes (ex: 9585550123)'. In the 'Email Alerts' section, there is an 'Email address:' text box and a note: 'Use any email address that you check regularly.' A green 'Add' button is located at the bottom right of the form. Red arrows point to the 'Cell phone number' field, the 'Cell phone carrier' dropdown, the 'Email address' field, and the 'Add' button.

and click **Add**.



This screenshot shows the 'Get Notified when Contacts Contact You' section. It includes a table with columns for 'Type', 'Email Address / Cell Phone', and 'Delete'. The table contains one entry: 'Email' with the address 'amy@amychorew.com'. Below the table is a green 'Add' button. The left sidebar shows 'My Account' with sub-tabs for 'Email', 'Website', 'Site Activity', 'Website Analytics', 'Performance Evaluator', and 'Leads (NEW)'.

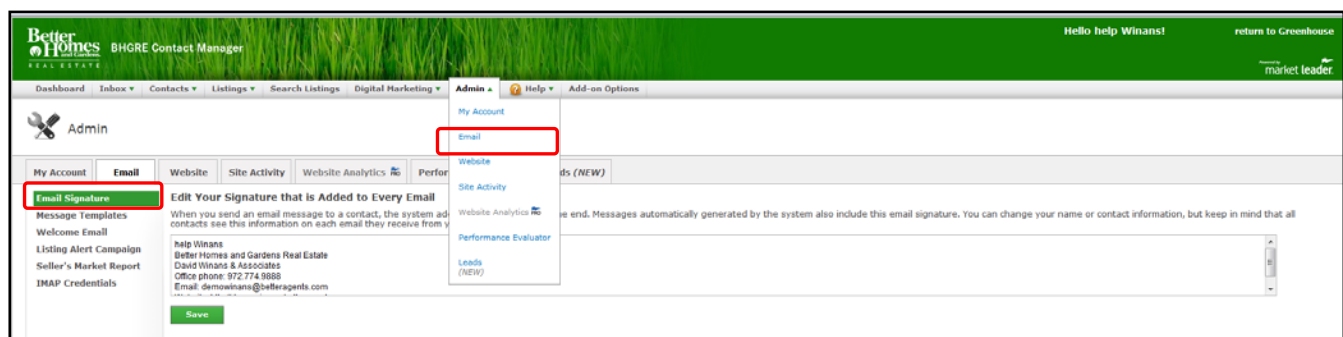
4.4 Edit Your Email

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.

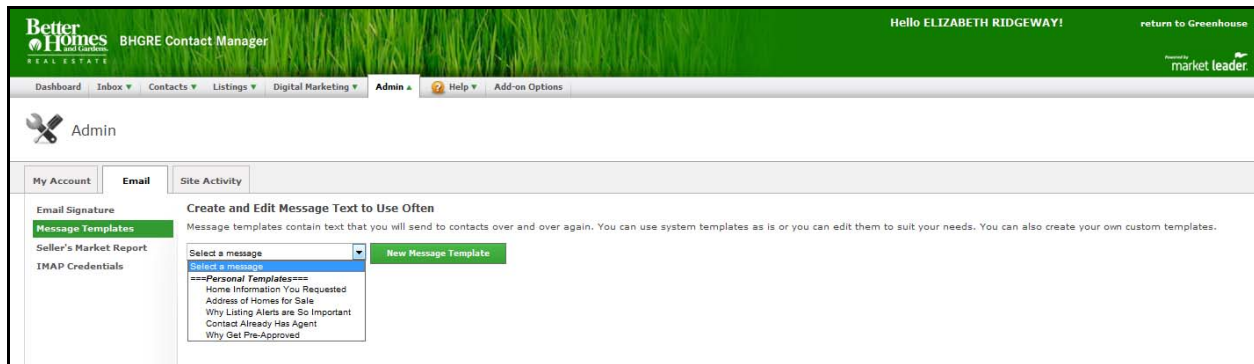
2. To edit or personalize your signature, select **Email Signature** from the left hand side.
3. Edit the information in the textbox.
4. When you are finished, click **Save**.



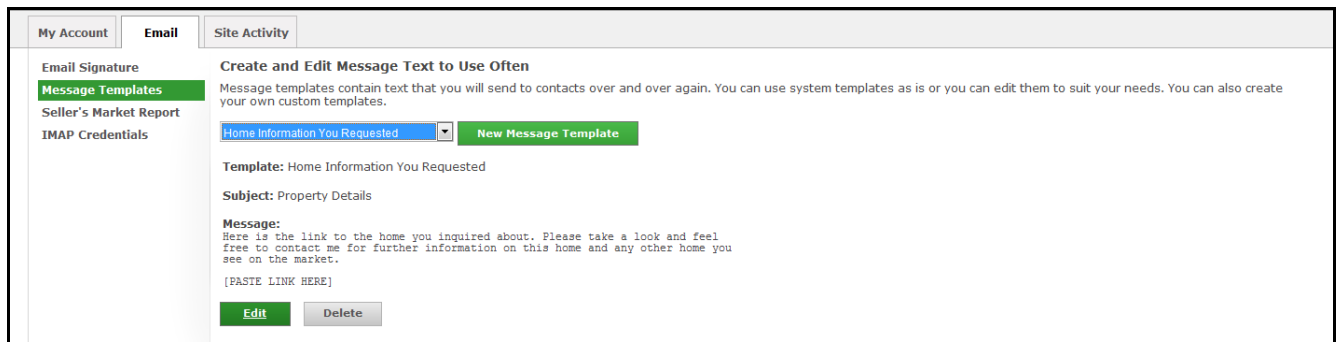
This screenshot shows the 'Edit Your Signature' page. The left sidebar has 'Email Signature' highlighted. The main content area shows a text box for the signature and a 'Save' button. The top navigation bar includes 'Dashboard', 'Inbox', 'Contacts', 'Listings', 'Search Listings', 'Digital Marketing', 'Admin', 'Help', and 'Add-on Options'. The 'Admin' dropdown menu is open, showing 'My Account', 'Email', 'Website', 'Site Activity', 'Website Analytics', 'Performance Evaluator', and 'Leads (NEW)'. The 'Email' option is highlighted. The top right corner says 'Hello help Winans!' and 'return to Greenhouse'.

4.5 Message Templates

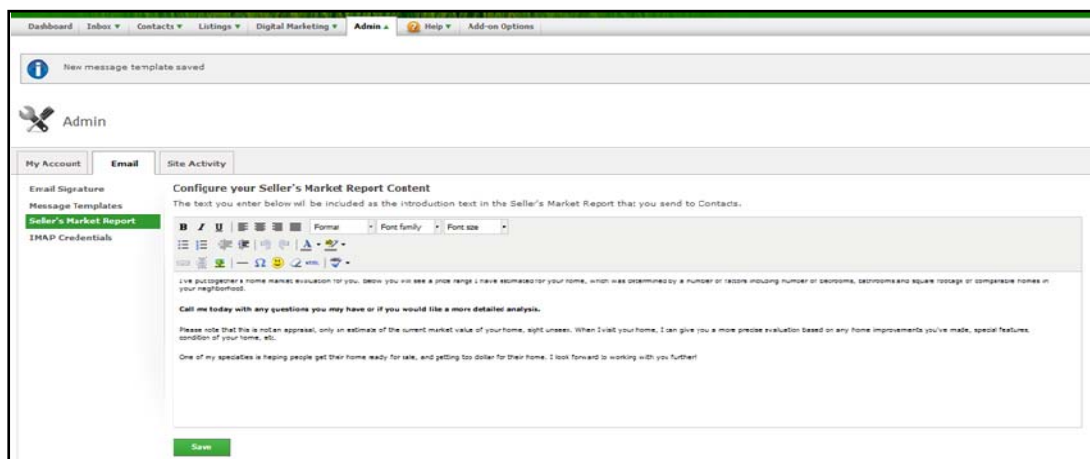
Message templates are commonly sent emails that you can create to automatically populate an email. Review and edit existing templates - create your own! Add template emails to send out on a regular basis.



The graphic below is an example of a template.

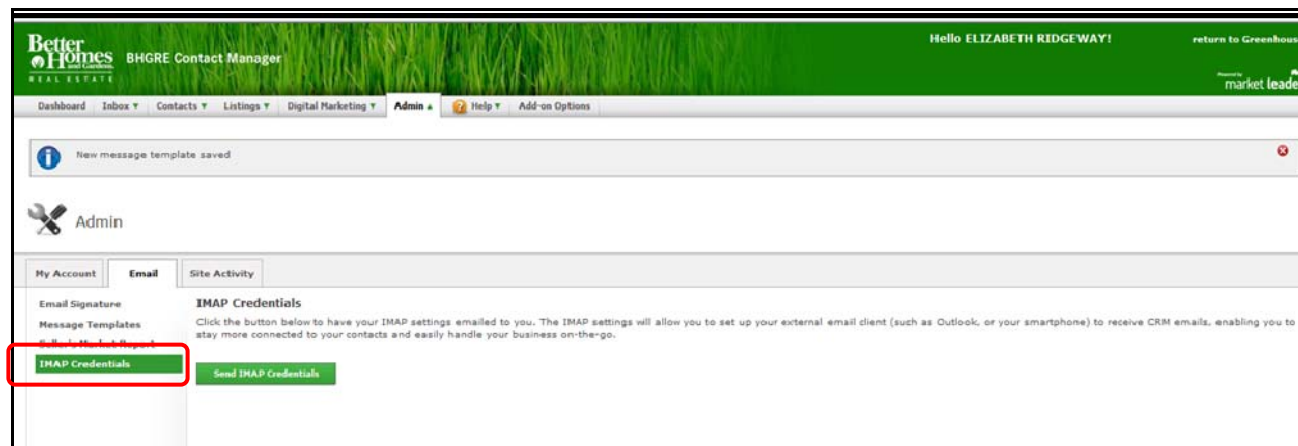


Review all the templates to make sure the content works for your business and edit them appropriately with the text editor provided.

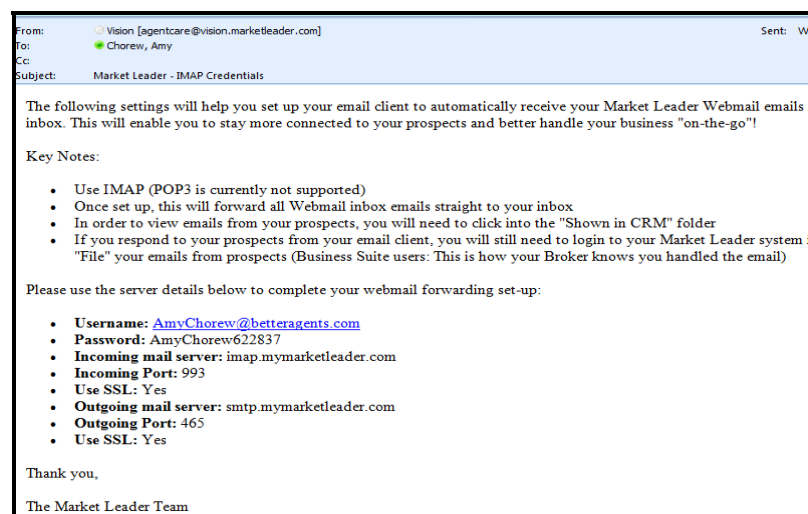


4.6 Add an Email account on your smart phone

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.



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.

The screenshot displays the 'Contacts' section of the BHGRE Contact Manager. At the top, there's a green header with the logo and user information: 'Hello ELIZABETH RIDGEWAY!' and 'return to Greenhouse'. Below the header is a navigation bar with tabs: Dashboard, Inbox, Contacts (selected), Listings, Digital Marketing, Admin, Help, and Add-on Options. The main content area shows a search bar with fields for Name, CRM Status (New), Type (Select options), and Groups (Select options), along with Search and Clear buttons. Below the search bar is an 'Advanced Search' link. The contact list is titled 'Contacts (2)' and has columns: Contact, Phone, Type, Source, Created, Time Frame, CRM Status, LeadRouter Status, and Actions. A table of contacts is shown below, with columns: Contact, Avg Price, View, Save, Looking In, Phone, Type, Source, Created, Activity, Time Frame, Status, and Actions. The table lists several contacts, including Stephen Defriend, Chelly Swanson, Osmany Verdecia, J Glass, Candie Poole, R S, Joe Davison, and Elizabeth Gama.

Contact	Avg Price	View	Save	Looking In	Phone	Type	Source	Created	Activity	Time Frame	Status	Actions
Stephen Defriend	\$454,686	32	0	KATY		Buyer	Other Ad Campaigns	3/10/12	3/6/13 10:39 AM	Just Looking	Active	
Chelly Swanson	\$191,644	70	18	RICHMOND	651-983-1251	Buyer	Other Ad Campaigns	3/8/12	3/6/13 12:16 AM	Just Looking	Active	
Osmany Verdecia	\$103,349	94	1	KATY		Buyer	Other Ad Campaigns	11/22/12	3/5/13 9:08 PM	Just Looking	Active	
J Glass	\$230,689	18	0	KATY	2-861-6384	Buyer	Other Ad Campaigns	1/23/13	3/5/13 8:00 PM	1-3 Months	Active	
Candie Poole	\$606,969	86	2	KATY	4232207887	Buyer	Other Ad Campaigns	12/10/11	3/5/13	Just Looking	Active	
R S	\$186,258	161	0	KATY		Buyer	Other Ad Campaigns	6/10/12	3/4/13	Just Looking	Active	
Joe Davison	\$115,927	40	1	KATY	4193662996	Buyer	Other Ad Campaigns	3/16/12	3/4/13	Just Looking	Active	
Elizabeth Gama	\$220,054	31	9	KATY	4193662996	Buyer	Google	1/19/11	3/4/13	Just Looking	Active	

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.

The screenshot shows the 'Contacts' tab selected in the BHGRE Contact Manager. The left sidebar has a 'Manage Groups' link highlighted with a red box. The main content area shows a list of contacts and a 'Manage Groups' button. Below the button, there's a text area for adding a signature to every email, with a 'Save' button at the bottom.

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

BHGRE Contact Manager

[Hello](#)
[return to Greenhouse](#)

[Dashboards](#)
[Inbox](#)
[Contacts](#)
[Listings](#)
[Digital Marketing](#)
[Admin](#)
[Help](#)
[Add-on Options](#)

[market leader](#)

Contacts

Create New Groups:

Save

Group Name	# Contacts	Actions
Agents	0	
Current Clients	0	
Family	0	
Friends	0	
Past Clients	0	
SOI	0	

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.

Dashboard
Inbox
Contacts
Listings
Digital Marketing
Admin
Help
Add-on Options

Contacts

Import Contacts
Export Contacts
Export Messages

You can import contacts listed in a CSV (comma-separated values) file.

You can upload an unlimited number of lists, but the total number of rows per list can not exceed 5000 rows. The file size must be less than 10MB. The file upload process could take several minutes depending on your file size. **Please do not navigate away while the file is uploading.** When the upload has completed.

Assign a group to imported contacts
Select Group

Set contact status
Active

Set contact type
Buyer

Set a CSV file to upload
Custom CSV

The file must contain data in the following order (fields in bold are required):
First Name, Last Name, and Email Address OR Physical Address without an email address or a Physical Address will not be imported.

Note: First Name, Last Name, and Email Address OR Physical Address without an email address or a Physical Address will not be imported.

A template of this format can be downloaded here: [Custom Import Template](#)

Please review your file for contact information accuracy **before** importing.

Select File to Upload:

Do you want to open or save this file?

Name: mlimporttemplate.csv
Type: Microsoft Office Excel 97-2003 Worksheet, 628 B...
From: [mlimport.com](#)

☒ Always ask before opening this type of file

While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save the file. [Click to learn more.](#)

Status
Job Start Date
Job End Date
Agent
Imported
Failed
Actions

This is the list of your contact import jobs within the last 30 days. You will need to refresh the page to see if the status has changed.

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

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

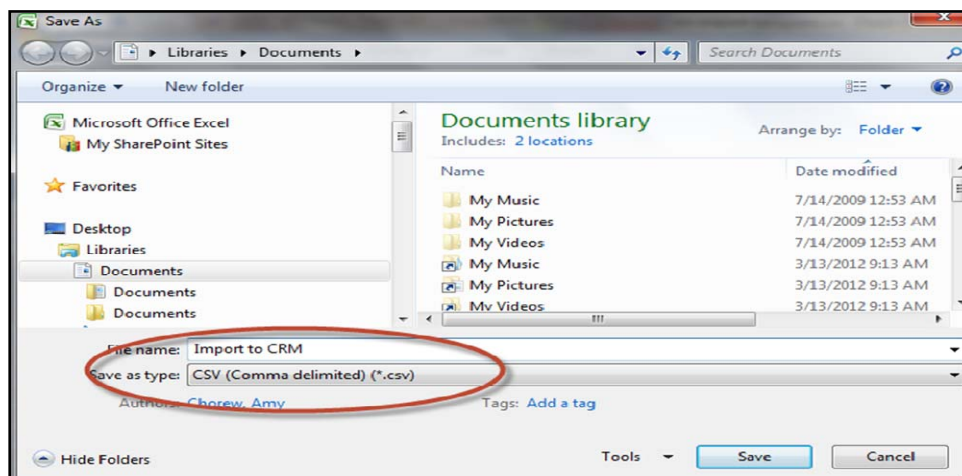
The screenshot shows the 'Import Contacts' interface. A red circle highlights the following configuration options:

- 1. Assign a group to imported contacts:** A dropdown menu showing 'Select Group' with options: Agents, Current Clients, Family, Friends, Past Clients, and SOI.
- 2. Set contact status:** A dropdown menu showing 'Active' with options: New, Active, Inactive, Hot, Sold, and Trash.
- 3. Set contact type:** A dropdown menu showing 'Buyer' with options: Buyer, Seller, Buyer/Seller, Agent, Renter, Investor, Vendor, and Other.
- 4. Select File to Upload:** A button labeled 'Choose File' and a text field showing 'No file chosen'.

Below the configuration options, there is a note: "Note: **First Name**, **Last Name**, and **Email Address** OR **Physical Address** are required. For example, if you have a contact without an Email Address to import, a Physical Address must be present. Contacts without an Email Address or a Physical Address will not be imported."

At the bottom, there is a table titled 'Imported Jobs' with columns: Status, Job Start Date, Job End Date, Agent, Imported, Failed, and Actions.

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.

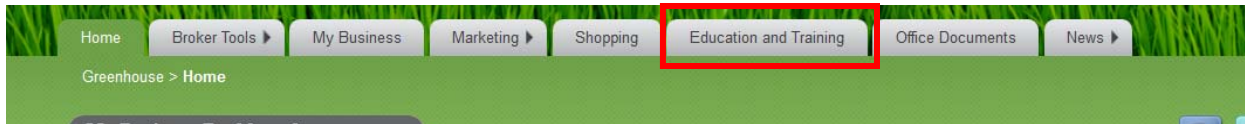
Imported Jobs						
This is the list of your contact import jobs within the last 30 days. You will need to refresh the page to see if the status has changed.						
Status	Job Start Date ▾	Job End Date	Agent	Imported	Failed	Actions
✓ Complete	4/23/13 8:10 AM	4/23/13 8:16 AM	Kevin Levent	10	0	

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.



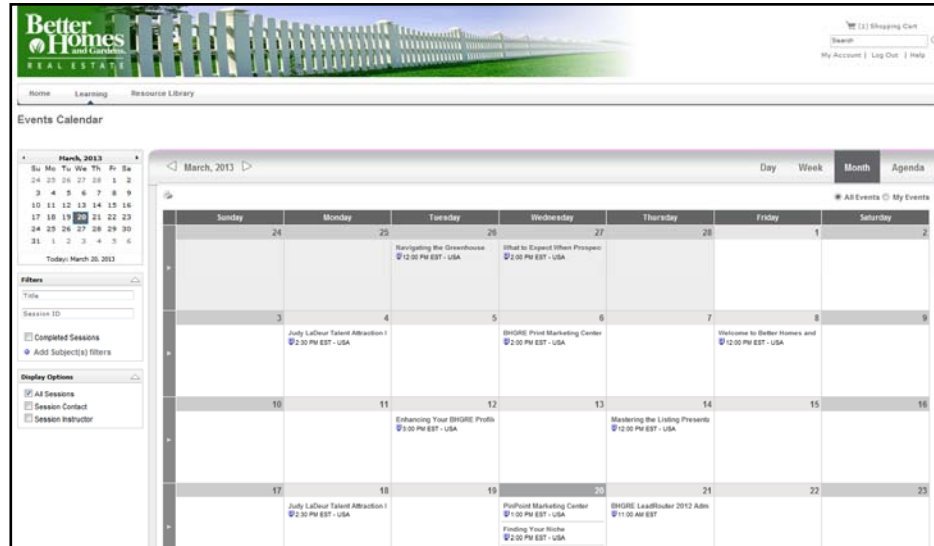
Below is the Learning Management System *Home* page. .



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



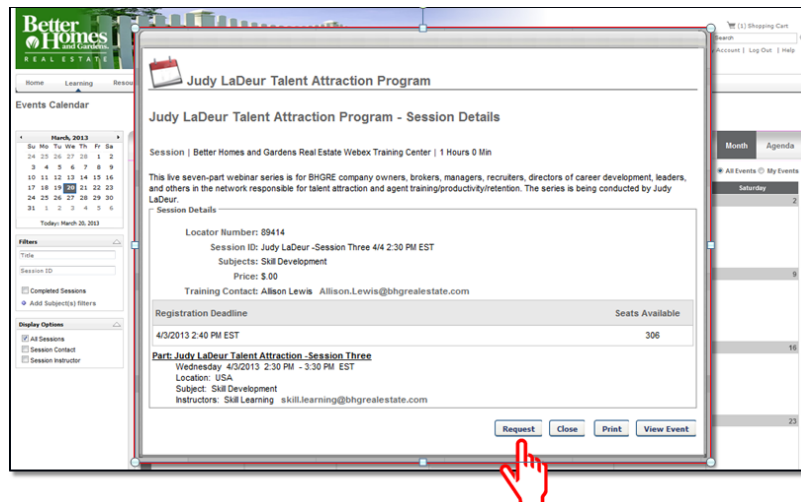
Register for a class on the LMS Training Calendar. To register for a class:

1. **Locate the class** you would like to attend
2. **Hover over the class** to view the additional details about the class.

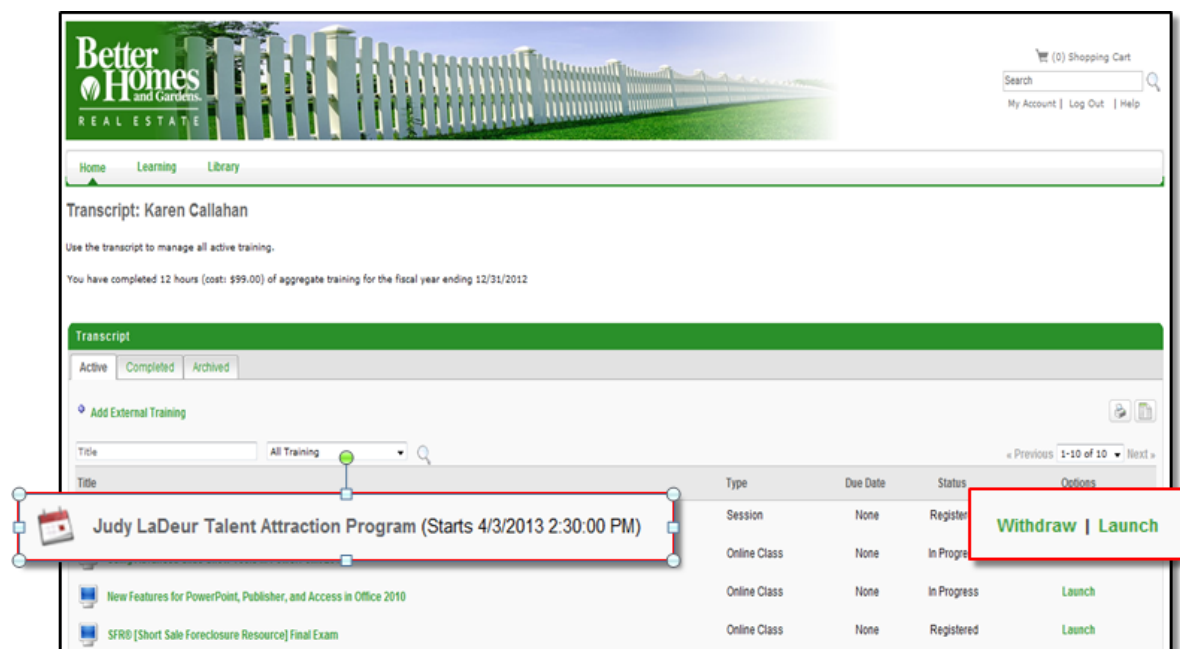
3. If you would like to register for the class, **click the title**. This will open details page.



- 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.

