
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



The Greenhouse
Tools and systems to
grow your business

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.



Welcome to Better Homes and Gardens® Real Estate

Username

Password

Remember me

[Log In](#) [Click Here to Reset Password](#)

Passwords are case-sensitive

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.



New User Welcome Page

Welcome to the BHGRE Greenhouse! Please set your timezone below

My Time Zone (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

The screenshot displays the BHGRE Greenhouse dashboard interface. At the top, the logo for 'Better Homes and Gardens REAL ESTATE' is visible on the left, and navigation links for 'Go to Sales View', 'Mark As Favorite', 'Client Services', 'Welcome DANIEL M. RAND', 'Profiles', and 'Sign Out' are on the right. A search bar is also present. Below the header is a main navigation menu with items like 'Home', 'Broker Tools', 'My Business', 'Marketing', 'Shopping', 'Education and Training', 'Office Documents', and 'News'. The main content area is divided into several sections: 'My Business Dashboard' with a 'My LeadRouter' widget containing a 'Click Here' button; 'Billboard' with a 'Welcome to the Greenhouse' message and a greenhouse illustration; 'Latest Videos' featuring a video titled 'Sherry Chris kicking off the Be Better Campaign!'; and 'Upcoming Events' listing several dates and times. Two red arrows point to the 'Click Here' buttons in the 'My LeadRouter' and 'Listings' sections, which both include the text: 'Activate your BHGRE Contact Manager, Digital Marketing Center and Free Agent Website!'.

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. 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 screenshot shows the '3 Account Setup' screen. At the top, it says 'Congratulations, You're almost done!' and 'We need one final piece of information so we can enable your account.' Below this is a green arrow pointing to the 'Complete Account Setup' section. The section contains a 'Zip/Postal Code' field with the value '10956-3314' and a blue question mark icon. Below that is a red instruction: 'You now get to select the email address for your new account.' The email field contains 'danielrand' and '@mltestb.com'. A note below the email field says: 'Note: The email for your select cannot contain periods or underscores.' A yellow tooltip with a circular arrow icon says 'Setting up your new account, please do not refresh...'. At the bottom is a blue 'Finish Setup' button. Three red circles with labels '3a', '3b', and '3c' are on the left, with red lines pointing to the Zip/Postal Code field, the email field, and the 'Finish Setup' button respectively.

The *Congratulations* screen appears.

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

The screenshot shows the 'Congratulations! You are now ready to get started using your Better Homes and Gardens® Real Estate Contact Manager and Digital Marketing Center!' screen. The top banner features the 'Better Homes and Gardens REAL ESTATE' logo on the left and 'Powered by market leader' on the right. The main content area has the heading 'Congratulations! You are now ready to get started using your Better Homes and Gardens® Real Estate Contact Manager and Digital Marketing Center!'. Below the heading is the text 'Next Steps:' followed by two numbered steps: '1. Make the most of your new Greenhouse tools!' with a link to training and product support, and '2. Take me to the main page of my BHGRE Contact Manager.' with a note that from the main page, users can access their Contact Manager and Digital Marketing Center. At the bottom is a blue button labeled 'Take me to my Contact Manager main page' with a red arrow pointing to it from the right.

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

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**.

Admin

- My Account
- Settings
- 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
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**.

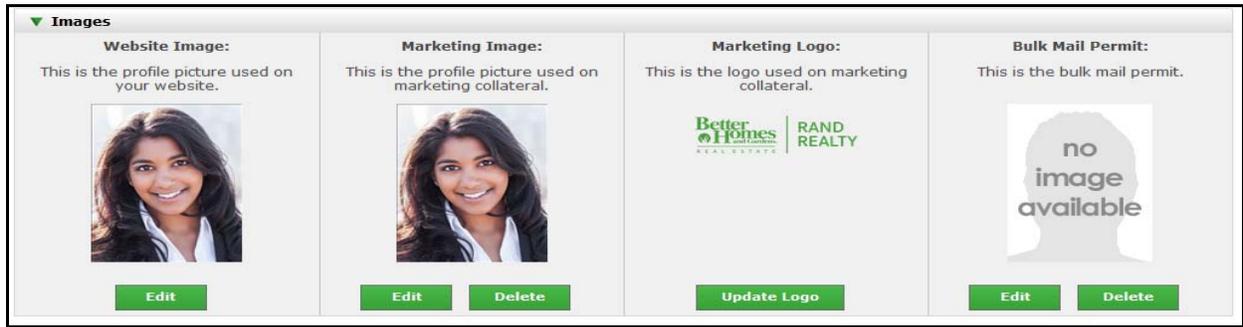
Add Social Media

URL Type: Facebook

URL: www.facebook.com/AmyChorew

Save

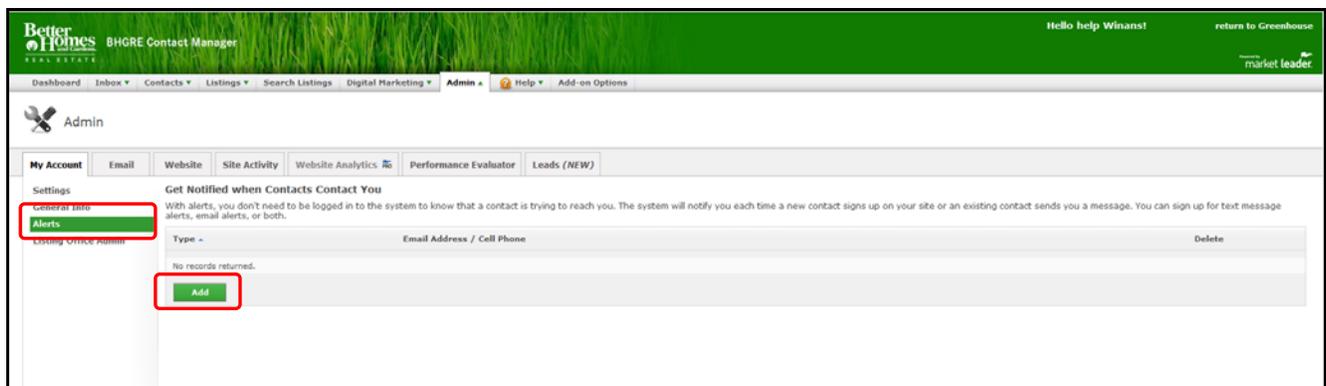
Upload your photo in the *Images* section; add your photo to **Website Image**, and **Marketing Image**. Additionally there are links to add your *Marketing Logo* and *Bulk Mail Permit*. By clicking on **Update Logo**, your company logo will appear.



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

Add Alert

Text Message Alerts

Cell phone number: Cell phone carrier:

Enter your 10-digit cell phone number with no spaces or dashes (ex: 9585550123)

AND/OR

Email Alerts

Email address:

Use any email address that you check regularly.

Add

and click **Add**.

My Account | Email | Website | Site Activity | Website Analytics | Performance Evaluator | Leads (NEW)

Settings

General Info

Alerts

Listing Office Admin

Get Notified when Contacts Contact You

With alerts, you don't need to be logged in to the system to know that a contact is trying to reach you. The system will notify you each time a new contact signs up on your site or an existing contact sends you a message. You can sign up for text message alerts, email alerts, or both.

Type	Email Address / Cell Phone	Delete
Email	amy@anymore.com	

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**.

Better Homes and Gardens Real Estate
BHGRE Contact Manager

Hello help Winans! return to Greenhouse

market leader

Dashboard | Inboxes | Contacts | Listings | Search Listings | Digital Marketing | **Admin** | Help | Add-on Options

Admin

My Account | **Email** | Website | Site Activity | Website Analytics | Performance Evaluator | Leads (NEW)

Email Signature

Edit Your Signature that is Added to Every Email

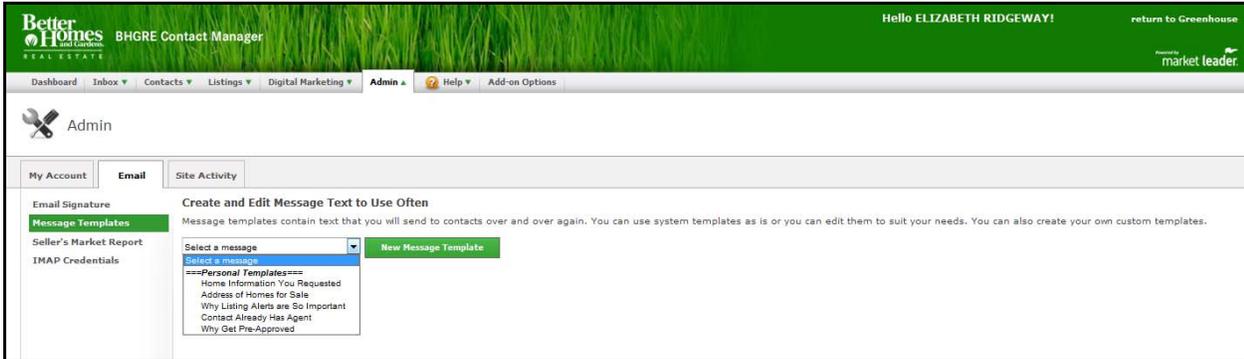
When you send an email message to a contact, the system adds this information on each email they receive from you.

help Winans
Better Homes and Gardens Real Estate
David Winans & Associates
Office phone: 972.774.9888
Email: demowinans@betteragents.com

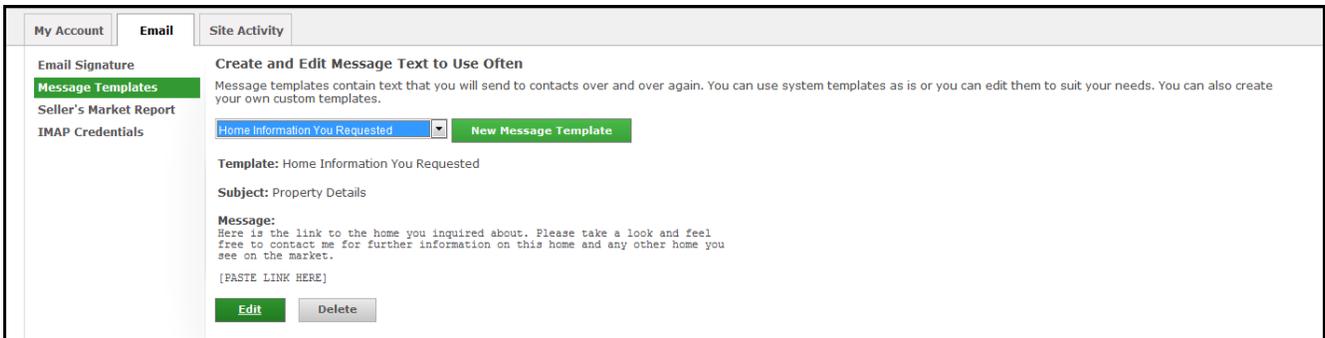
Save

4.5 Message Templates

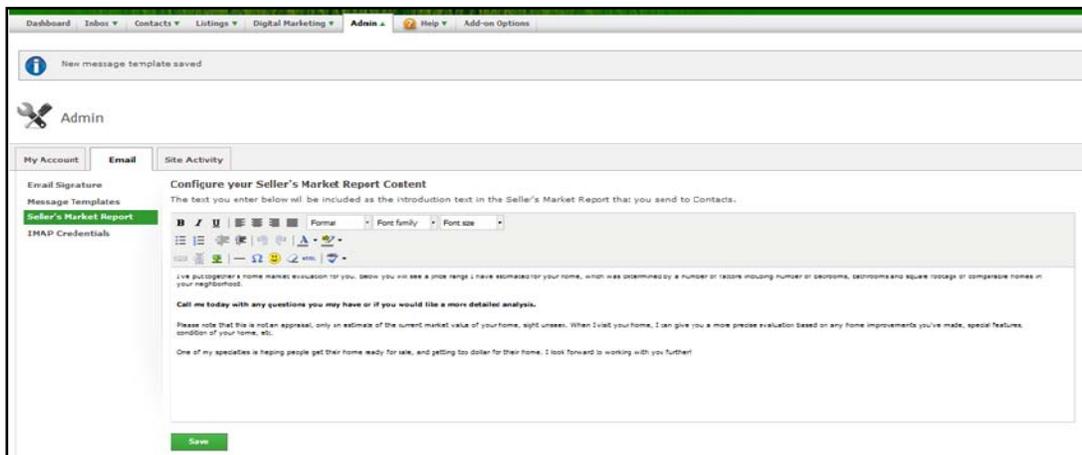
Message templates are commonly sent emails that you can create to automatically populate an email. Review and edit existing templates - create your own! Add template emails to send out on a regular basis.



The graphic below is an example of a template.

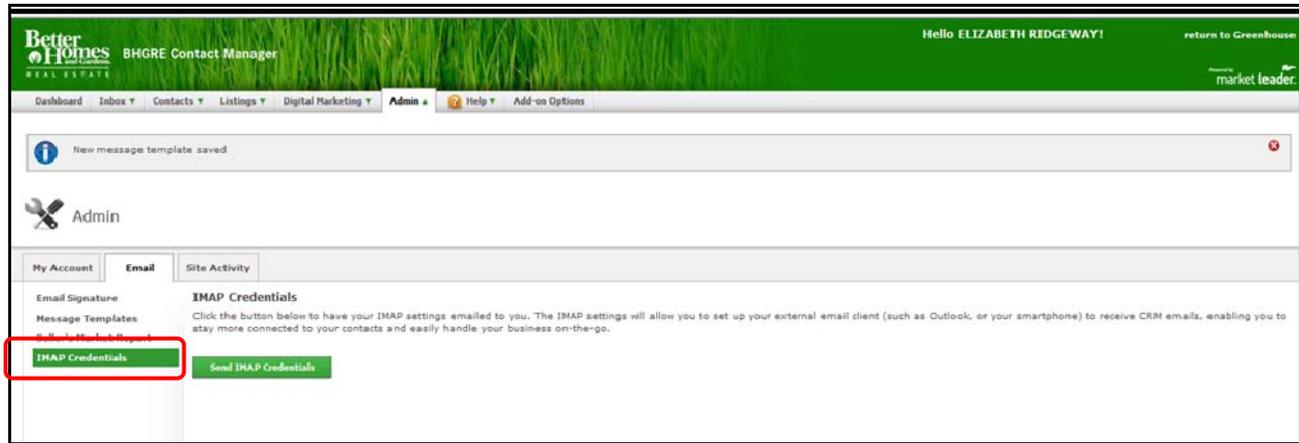


Review all the templates to make sure the content works for your business and edit them appropriately with the text editor provided.

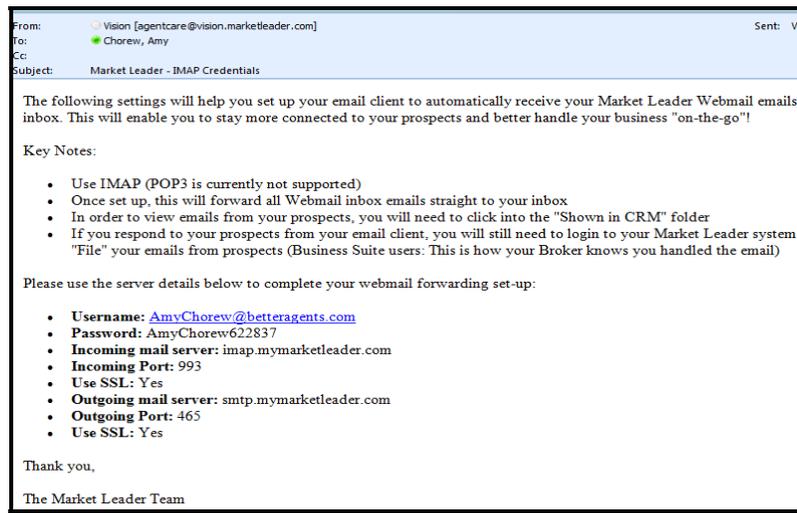


4.6 Add an Email account on your smart phone

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



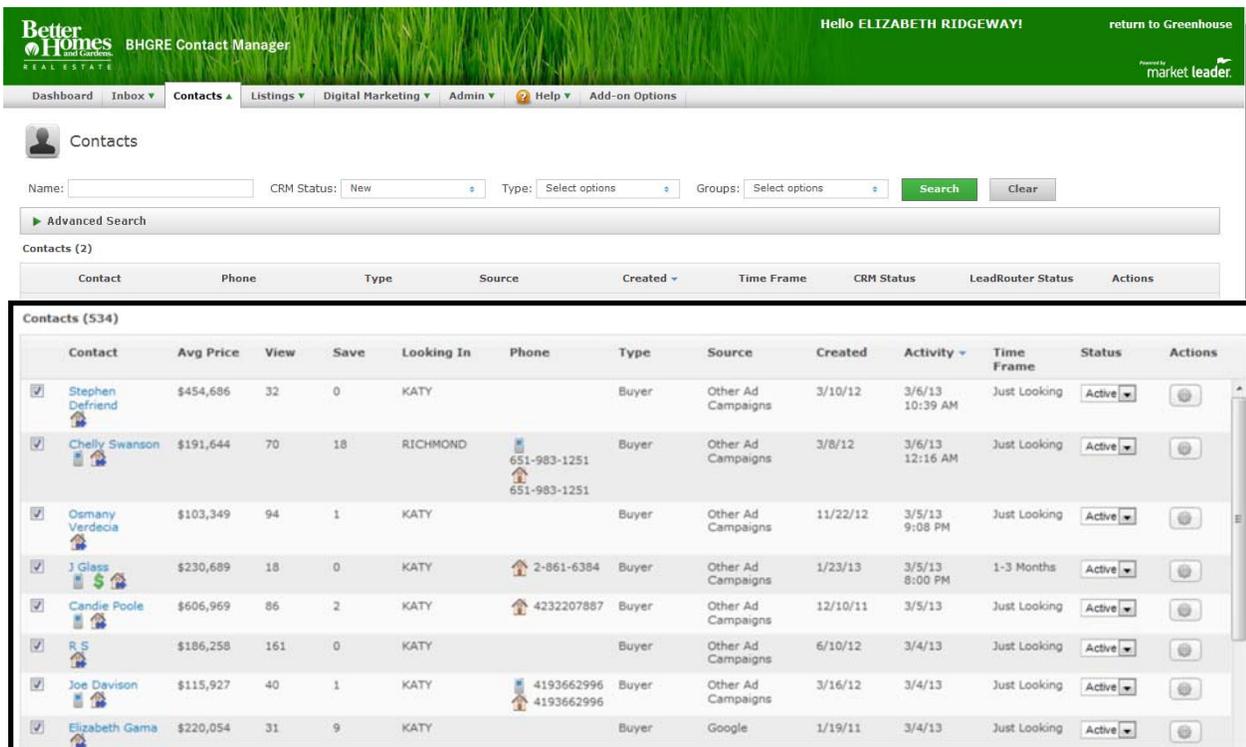
Instructions similar to the graphic below will be emailed to you. After setup your BetterAgents email will be available on your smartphone as pictured here. For further instruction, contact client services.



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.



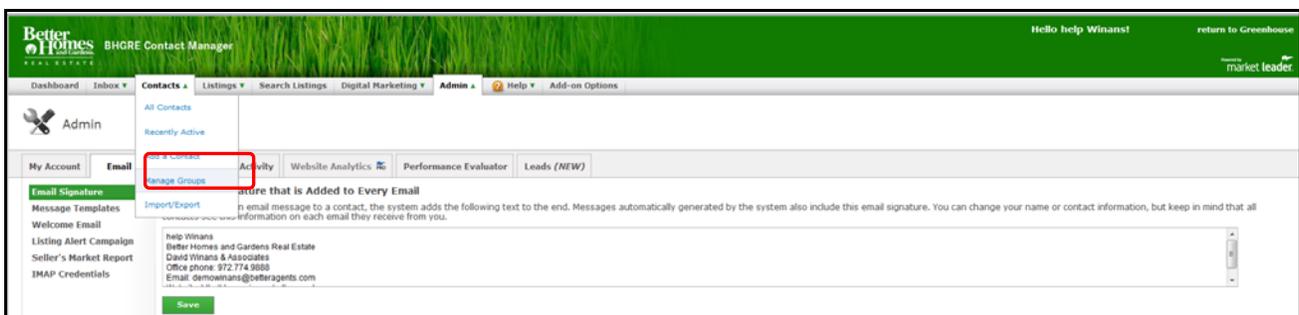
The screenshot shows the BHGRE Contact Manager interface. At the top, there is a navigation bar with the logo and user information: "Hello ELIZABETH RIDGEWAY!". Below the navigation bar, there is a search section with fields for Name, CRM Status (set to New), Type, and Groups, along with Search and Clear buttons. The main content area displays a list of contacts with columns for Contact, Avg Price, View, Save, Looking In, Phone, Type, Source, Created, Activity, Time Frame, Status, and Actions. The list is titled "Contacts (534)".

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 651-983-1251	Buyer	Other Ad Campaigns	3/8/12	3/6/13 12:16 AM	Just Looking	Active	
Ornany 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 4193662996	Buyer	Other Ad Campaigns	3/16/12	3/4/13	Just Looking	Active	
Elizabeth Gama	\$220,054	31	9	KATY		Buyer	Google	1/19/11	3/4/13	Just Looking	Active	

4.8 Organize Your Contacts into Groups.

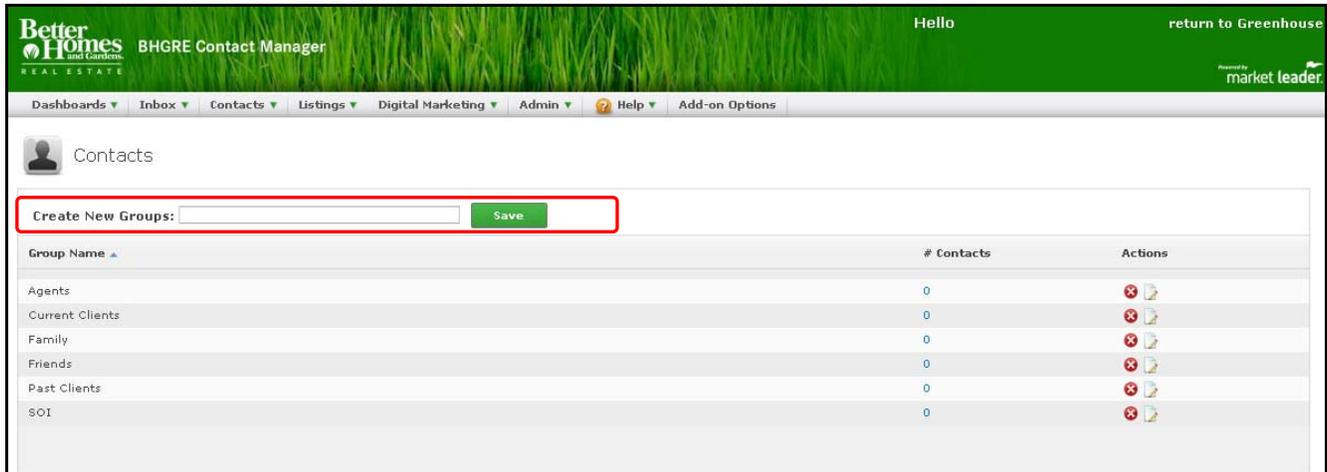
Within the *Contact Manager*, you have the ability to organize your contacts into *Groups*. This feature enables you to easily send *digital marketing pieces* and *campaigns* to your contacts. Create as many *Groups* as you need in order to organize your contacts. To set up your Groups:

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



The screenshot shows the BHGRE Contact Manager interface with the 'Contacts' tab selected. The 'Manage Groups' option is highlighted with a red box. The interface includes a navigation bar, a search section, and a main content area with various tabs and options.

2. Add a group name and click Save



4.9 Import Your Contacts

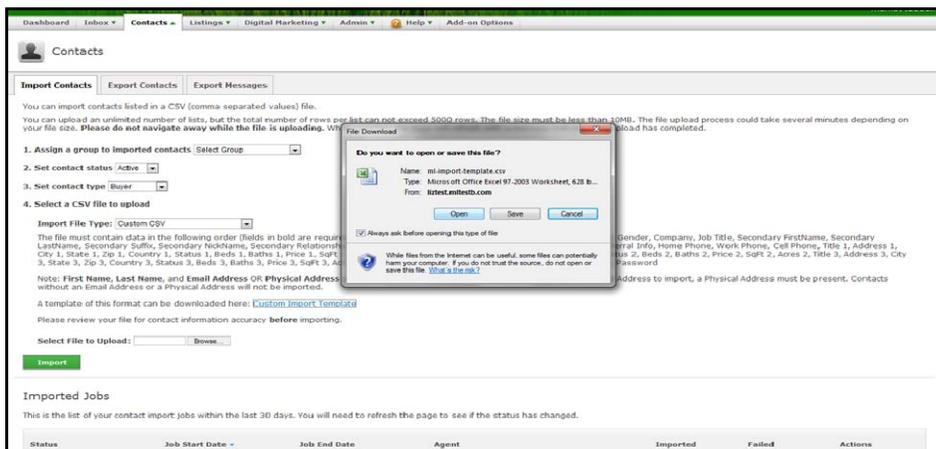
Contacts will come into your CRM from your *LeadRouter* account and your BHGRE website, but you can also import contacts that you now have. You can import 5,000 names per file and multiple files per day. **Note:** For more detailed instructions on importing contacts, make sure to visit the *Greenhouse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

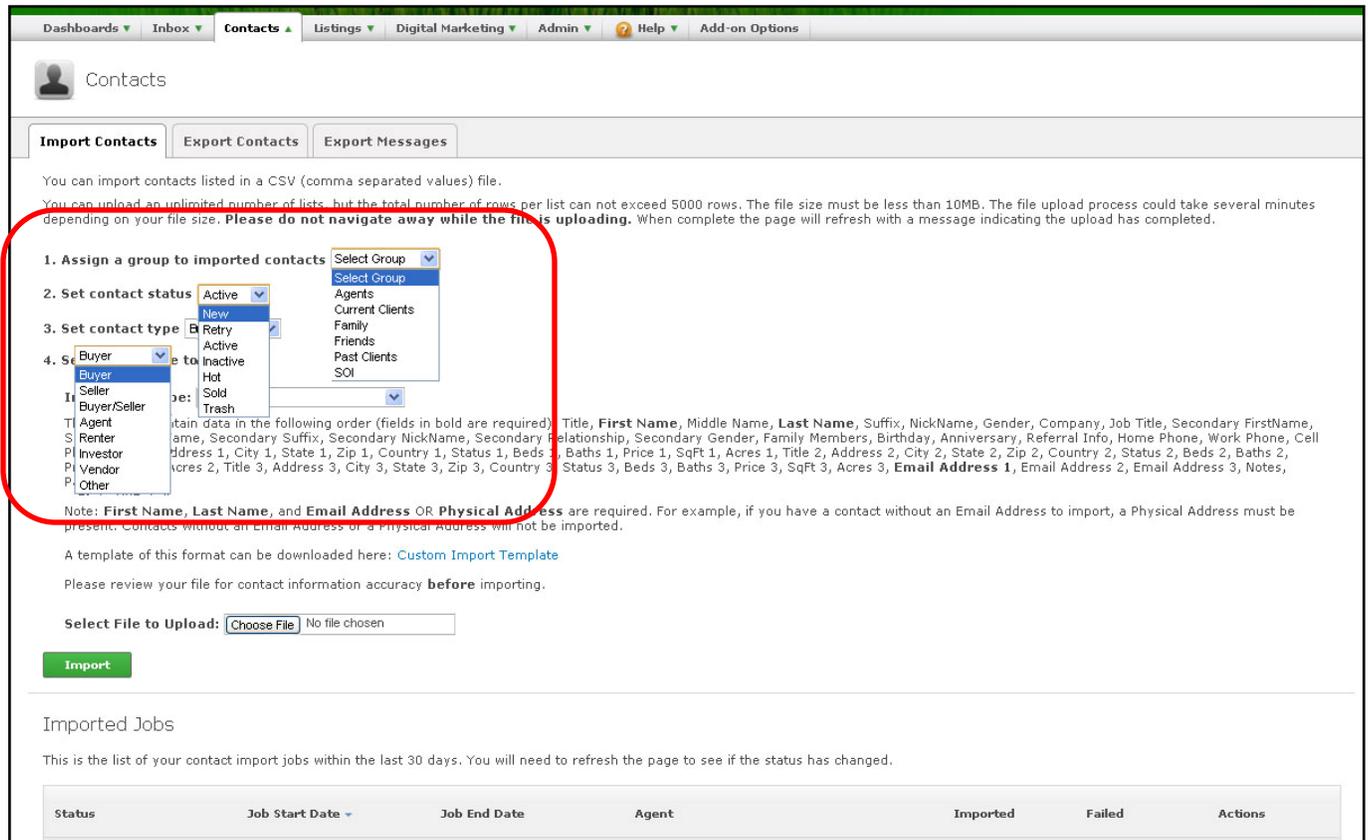
If you are going to import an excel spreadsheet you must use the template provided.

1. Click on the link and download the file.

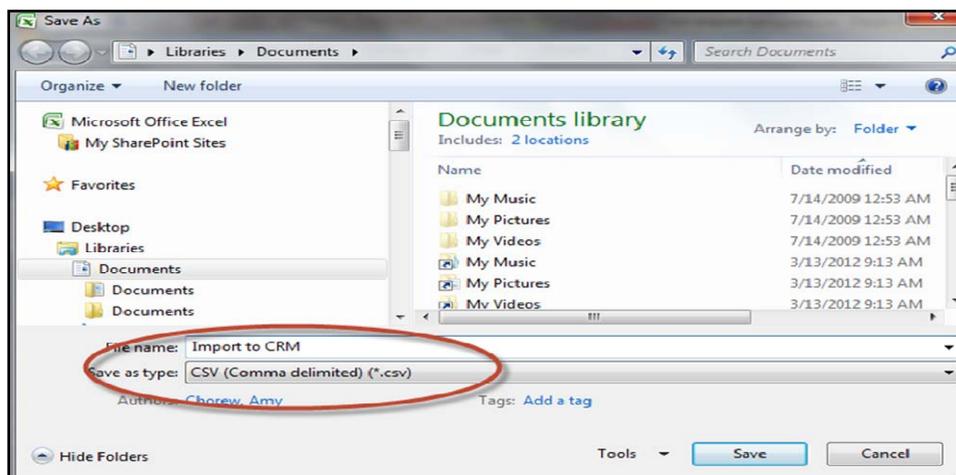


When creating your spreadsheet for uploading, you are only required to input **First Name**, **Last Name**, and **Email Address 1** or **Street address**.

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



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.



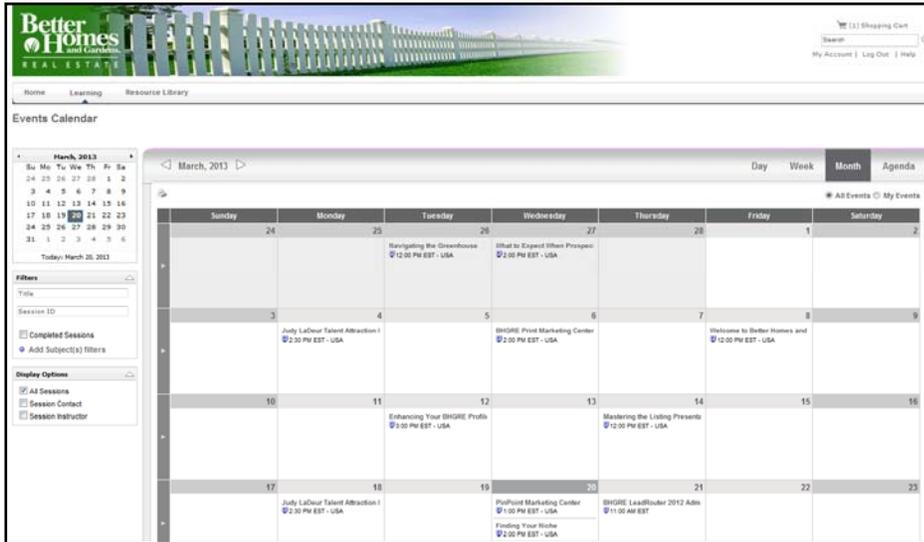
Below is the Learning Management System *Home* page. .



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



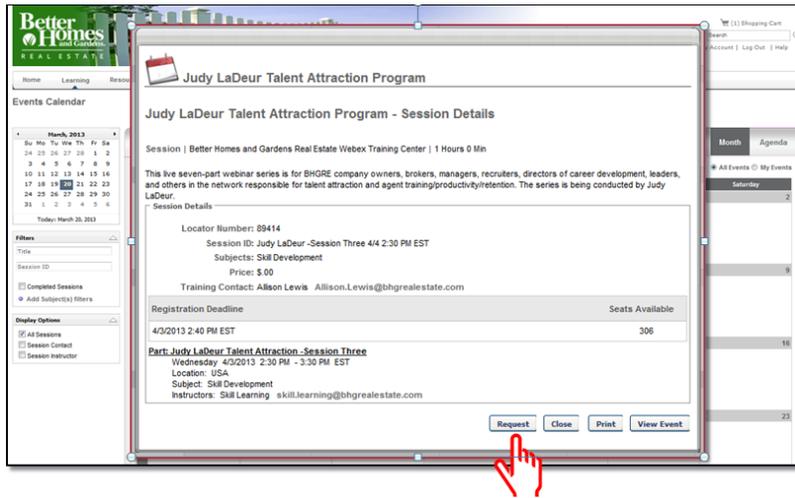
Register for a class on the LMS Training Calendar. To register for a class:

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

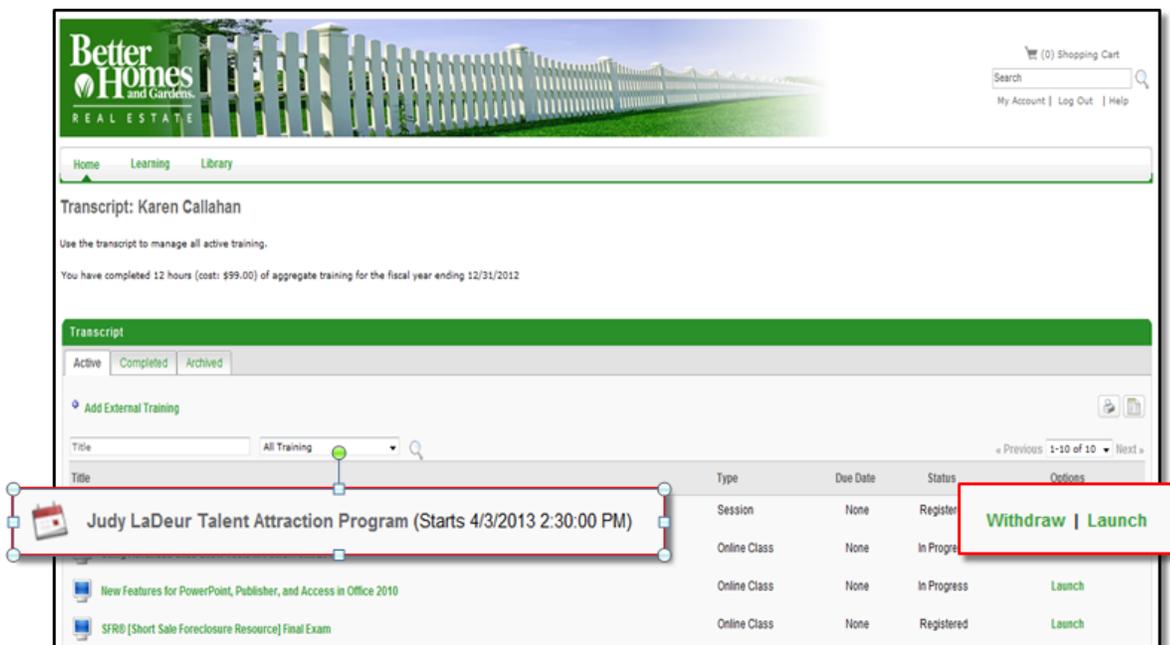
3. If you would like to register for the class, **click the title**. This will open details page.



- 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.**



Home Learning Resource Library

Welcome, Karen, to your personalized BHGRE training center.

My Transcript
Click [HERE](#) to view your transcript.

Training Calendar
Click [HERE](#) to view the events calendar.

Suggested Training
No suggested training

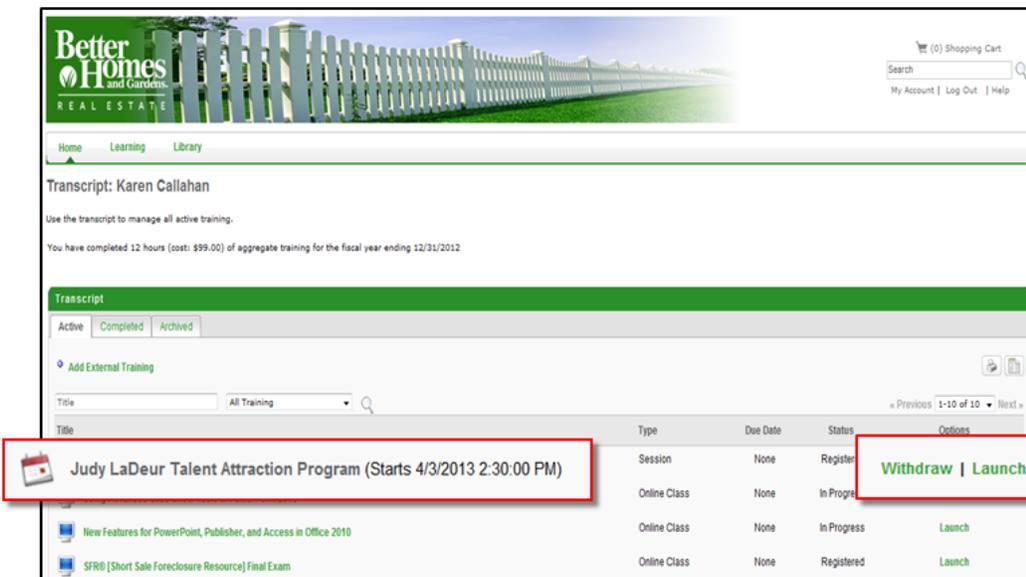
BHGRE Products and Tool Learning
Find training on all of the products and tools that are in the BHGRE Greenhouse. Click the [SEARCH](#) to register for this training.

DO IT YOURSELF
DIY -Do It Yourself -Self Paced Training
The DIY -Do It Yourself section is where you find the self paced and recorded training. Browse through the available training and click [LAUNCH](#) to view the DIY training classes.

Search Search

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.



Shopping Cart (0)

Search

My Account | Log Out | Help

Home Learning Library

Transcript: Karen Callahan

Use the transcript to manage all active training.

You have completed 12 hours (cost: \$99.00) of aggregate training for the fiscal year ending 12/31/2012

Transcript

Active Completed Archived

Add External Training

Title All Training

Title	Type	Due Date	Status	Options
 Judy LaDeur Talent Attraction Program (Starts 4/3/2013 2:30:00 PM)	Session	None	Registered	Withdraw Launch
 New Features for PowerPoint, Publisher, and Access in Office 2010	Online Class	None	In Progress	Launch
 SFRB (Short Sale Foreclosure Resource) Final Exam	Online Class	None	Registered	Launch