

LISTINGBOOK'S Agent Quick Start Workbook



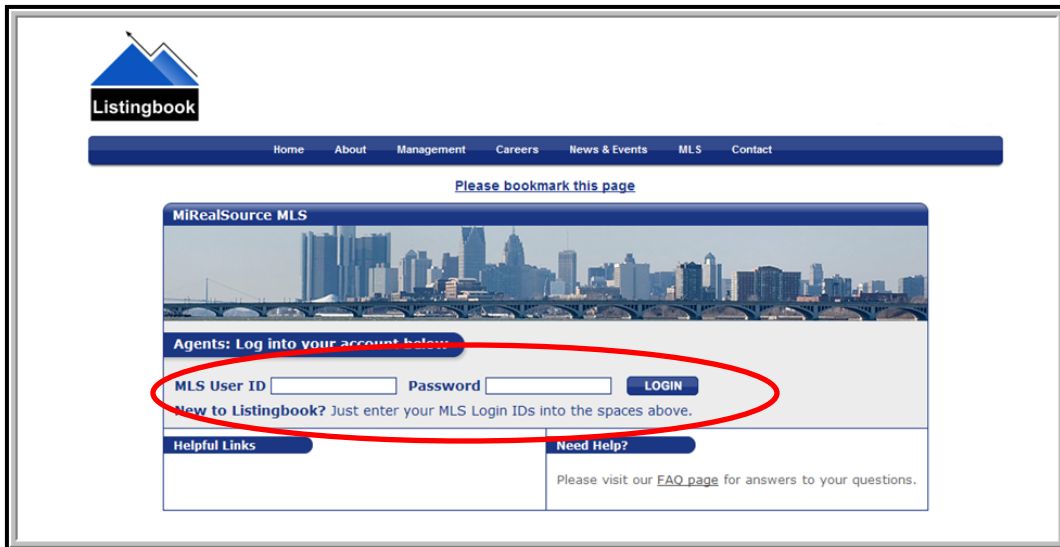


Get Started Now!
Create your FREE agent account by going to
www.listingbook.com

1. Select your MLS from the “Agent Login” drop-down



2. Enter your login information and click “Login”



3. Follow the instructions for setting up your account



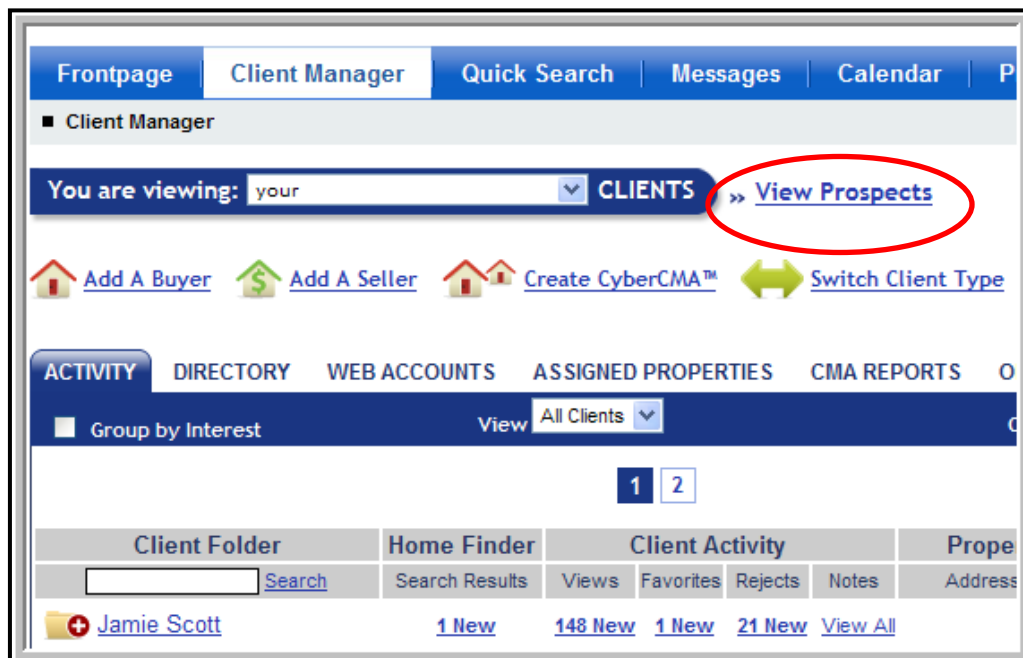
Adding Prospects

Before adding your prospects, be sure to go to **PROFILE** (from your menu) and enter your "Personal Information"

1. Click "Client Manager" from the menu bar

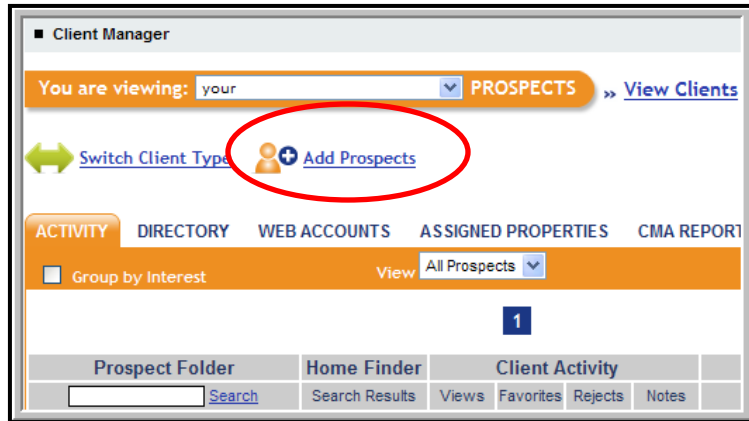


2. Click "View Prospects"





3. Click "Add Prospects"



Add to your Prospect Manager

Click "Import Contacts" to load prospects directly into Listingbook from another application (e.g. Outlook), or manually enter them below. [IMPORT CONTACTS](#)

First Name	Last Name	Email Address	Home Phone (Optional)	<input checked="" type="checkbox"/> Add
Jane	Garner	jane@aol.com	336 - 722 - 3456	<input checked="" type="checkbox"/>
Gerald	Smith	gsmith@yahoo.com	- - -	<input checked="" type="checkbox"/>
Otis	Campbell	campbello1972@rr.com	336 - 555 - 5511	<input checked="" type="checkbox"/>
Louie	Oakley	loakley@yahoo.com	336 - 555 - 8876	<input checked="" type="checkbox"/>
Melissa	Myers	melissa@verizon.net	- - -	<input checked="" type="checkbox"/>
Tony	Simpson	tsimp007@aol.com	336 - 555 - 1234	<input checked="" type="checkbox"/>

[+ ADD ADDITIONAL FIELD](#) [INVITE](#)

4. Type your prospects' information in the form; click "Invite"

5. Call your prospect and make sure they activate their account; tell them to:

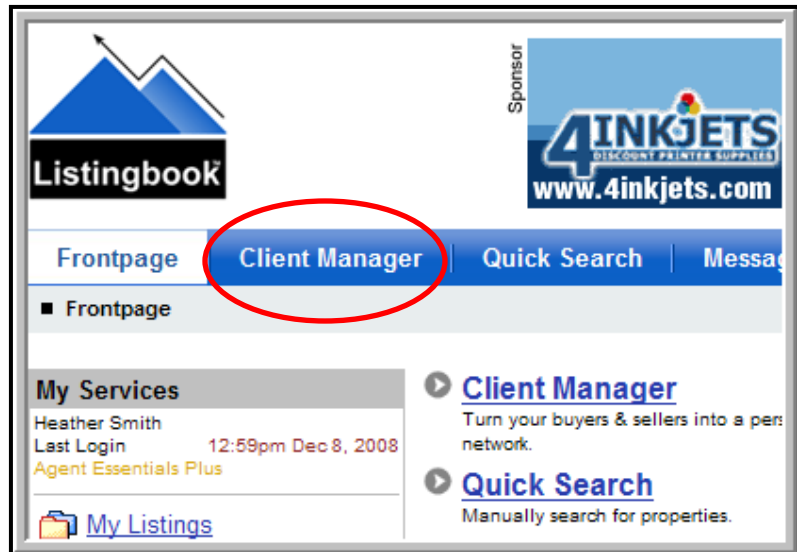
- Look for an activation email from Listingbook Messenger
- Add mailservice@listingbook.com to their email address book
- Know why they should use Listingbook
 1. It allows effortless communication with their agent about listings
 2. It gives easy, accurate and robust real estate searches
 3. It gives the prospect a private account, when and where they want it



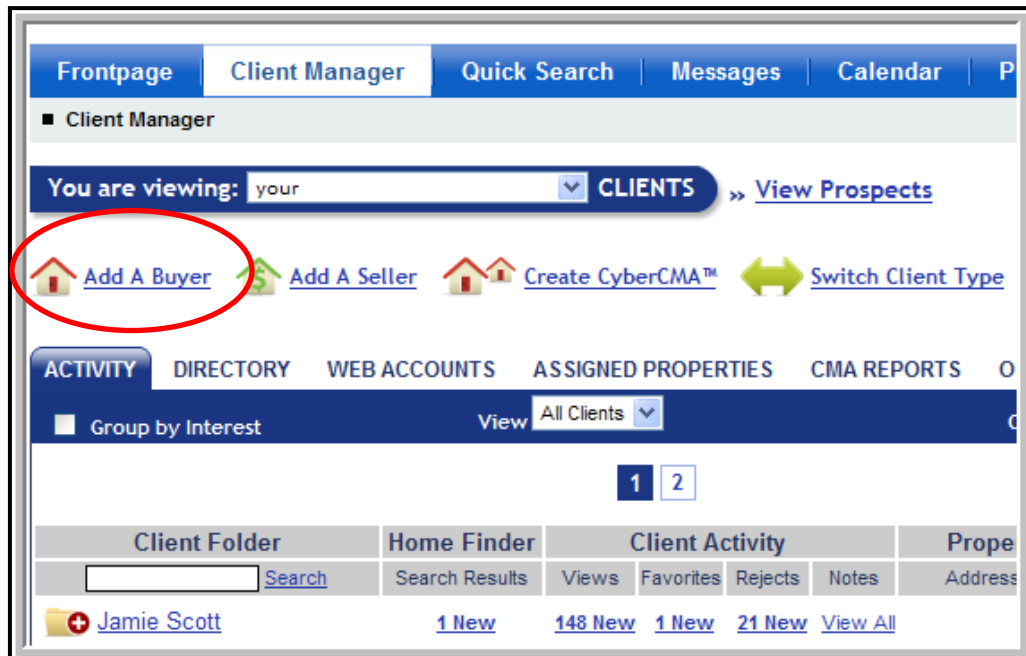
Adding a Buyer

Before adding your clients, be sure to go to **PROFILE** (from your menu) and enter your "Personal Information"

1. Click "Client Manager" from the menu bar




2. Click "Add a Buyer"





3. Enter the client name(s) that will appear on the folder and click "Save"

Add Folder **Home Finder** **Create Account** **Additional Services**

 You will need to create a folder for this client. You may want to check your [directory](#) to ensure that you are not creating a duplicate.

A folder stores all information related to a client's home search, listed properties and CMAs. The folder is for your reference only and will not be seen by the client. Fill out the form and click Save to continue. Required items are bold.

Client Folder

Primary Client Name

The Primary client and Additional client names are used to identify this folder.

First Name

Last Name

Additional Client Name

First Name

Last Name

Folder Information

Interest level and folder notes are for your information only and are not shared with the client.

Interest Level

Information



4. Create a Home Finder by selecting or entering the:
 - Property Type
 - Price Range
 - Areas (highlight and click "Add" to include in your *Search Area*)
 - Property Features (these are optional)

A Home Finder tracks new activity matching your buyer's criteria. Enter the buyer's search criteria and click **Save** to continue. You may [skip this step](#). Save

Residential | Lots & Land | Rental

Home Finder Criteria

Include residential properties in Home Finder results

Property Type	Required	Price Range	Required
<input checked="" type="checkbox"/> Single Family		Minimum	Maximum
<input type="checkbox"/> Condominium		\$ 900,000	\$ 975,000
<input type="checkbox"/> Mobile Home			
<input type="checkbox"/> Stock Cooperative			
<input type="checkbox"/> Own Your Own			
<input type="checkbox"/> High-Rise			
<input type="checkbox"/> Loft / Loft Live and Work			
<input type="checkbox"/> Timeshare			
<input type="checkbox"/> Apartment			
<input type="checkbox"/> Combo - Res & Com			

Areas Required

Build the search area by choosing **ANY COMBINATION** (max 25) of Standard Areas, Builder Tracts and/or Map Search selections

Standard Areas | Builder Tracts | Map Search

Select County(s):
Orange County
Los Angeles County
Riverside County
San Bernardino County

Select Area Type(s):
Cities
School Districts
ZIP Codes
MLS Areas

Select Area(s):
Aliso Viejo
Anaheim
Anaheim Hills
Brea
Buena Park
Corona Del Mar
Costa Mesa
Coto De Caza

To add to your criteria, scroll through the choices in the window to the left and click the "Add" button. Hold down the Ctrl key for multiple choices.
Areas from the counties where you normally work are displayed first.

Add Remove

Search Areas (24 slots available)
Standard Area: Irvine

Property Features Optional

Must Have features need to be used carefully! A **Must Have** choice eliminates any property that does not match. **Like to Have** criteria choices **do not** eliminate properties. Listingbook uses **Like to Have** features to find perfect matches.

Feature	Like to Have	Must Have
Bedrooms	3 or more	3 or more
Baths	2 or more	1 and 1/2 or more

5. Click "Save"

A Home Finder tracks new activity matching your buyer's criteria. Enter the buyer's search criteria and click **Save** to continue. You may [skip this step](#). Save



6. Click "Continue" if you are happy with your search statistics; if not, click "Edit Home Finder" to change the criteria

↓

Add Folder Home Finder Create Account Additional Services

Home Finder created

Search Criteria

Buyer

Property Type Residential
Single Family

Price Range Residential
\$900,000 - \$975,000

Search Area
Standard Area: Irvine

Like To Have Features
Residential
Bedrooms: 4 or more
Baths: 2 or more

Must Have Features
Residential
Bedrooms: 3 or more
Baths: 1 and 1/2 or more

Don't Want Features
Residential
None Selected

Search Statistics (Residential)

Type + Area	426
Type + Area + Price Range	24
Type + Area + Price Range + Must Have Features	23

Properties in Home Finder Results

Perfect Matches	20
Close Matches	3

Home Finder created



7. Create the client's Listingbook Account by entering the client's Email Address, Relationship Options, and reviewing the Account Services and Buyer Services; click "Save"

↓

Add Folder Home Finder Create Account Additional Services

Provide client with unsurpassed 24/7 service. Giving an account streamlines communications, saves you time, and keeps you in control of the relationship. Fill out the form and click **Save** to continue. **Required items are bold.** You may [skip this step](#).

Save

Listingbook Account

Client Name and Summary

First Name: **Last Name:**
Email:

Relationship Options

Relationship:
Active Client is someone you know well or with whom you have a relationship. Active clients may have access to *tax values, area sales, DOM, and price history*.
Potential Client is someone you don't know very well. Listingbook will automatically encourage them to contact you to "upgrade" their account.

Status:
Expires:

Account Services

Quick Search
 Morning Reports ⓘ For more information about one of our services, roll over that service with your mouse.
 Property Notes
 Special Offers

Listing Display (Affects all Web accounts in this folder)

Days On Market

Display address, directions, and map location for listings viewed by this client.

Yes, all listings
 Yes, for commissions of at least
 No, all listings

Buyer Services

Home Finder Results ⓘ For more information about one of our services, roll over that service with your mouse
 Open Houses
 Edit Home Finder
 Notify of Criteria Change



8. You have successfully added your client to Listingbook. Click “Open Client Folder” to view their client folder

Additional Services

Client: Anthony Sands

Remember to call your new client and make sure they add "mailservice@listingbook.com" to their contacts and/or address book to avoid any local SPAM filters. You can check their login status in your Client Manager.

- ▶ [New Buyer Letter](#)
Send an introduction Letter to your new Buyer Client
- ▶ [View Buyer's Home Finder Results](#)
Communicate with your client using Agent Picks and Property Notes
- ▶ [Open Client's Folder](#)
View information in the client's folder
- ▶ [Assign a Property](#)
Assign a property owned by this client
- ▶ [Create an Additional Listingbook Account](#)
Give a spouse, partner or family member an account

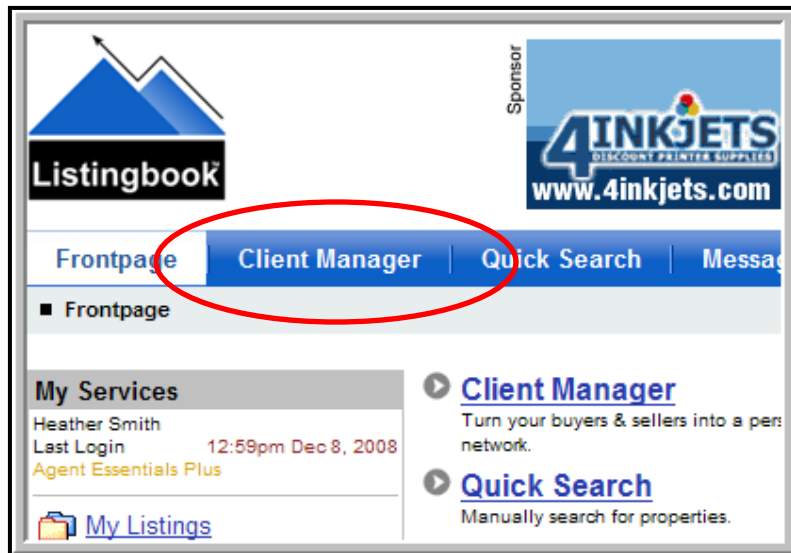
9. Call your client and make sure they activate their account; tell them to:
- Look for an activation email from Listingbook Messenger
 - Add mailservice@listingbook.com to their email address book
 - Know why they should use Listingbook
 1. It allows effortless communication with their agent about listings
 2. It gives easy, accurate and robust real estate searches
 3. It gives the client a private account when and where they want it



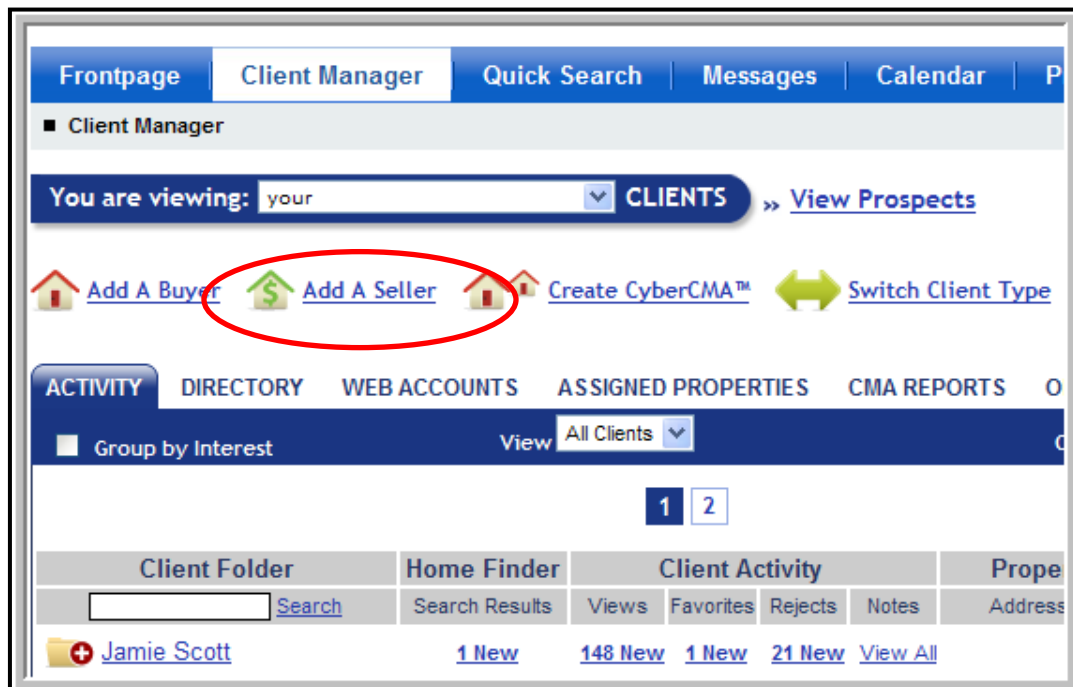
Adding a Seller

Before adding your clients, be sure to go to PROFILE (from your menu) and enter your "Personal Information"

1. Click "Client Manager" from the menu bar




2. Click "Add a Seller"





3. Enter the client name(s) that will appear on the folder and click "Save"

[Add Folder](#) [Home Finder](#) [Create Account](#) [Additional Services](#)

 You will need to create a folder for this client. You may want to check your [directory](#) to ensure that you are not creating a duplicate.

A folder stores all information related to a client's home search, listed properties and CMAs. The folder is for your reference only and will not be seen by the client. Fill out the form and click Save to continue. Required items are bold.

Client Folder

Primary Client Name

The Primary client and Additional client names are used to identify this folder.

First Name

Last Name

Additional Client Name

First Name

Last Name

Folder Information

Interest level and folder notes are for your information only and are not shared with the client.

Interest Level

Information



- Place a checkmark beside the listing you want to assign to your seller and click "Continue"

To assign a listing to this client, choose any of your listings under **Assign My Listings**, or you may enter any other address by clicking the **Enter Any Other Address** link. You may [skip this step](#).

Assign Property

Assign My Listings

Check the box of the listing(s) you wish to assign and then click **Continue**

<input type="checkbox"/> <input type="button" value="Map It"/> 26492 Las Palmas #7 Price: \$370,000 Bedrooms: 2 Baths: 2 Full	<input type="checkbox"/> <input type="button" value="Map It"/> 13 Dry Creek Ln Price: \$439,000 Bedrooms: 2 Baths: 2 Full	<input type="checkbox"/> <input type="button" value="Map It"/> 22892 Via Pimiento Price: \$320,000 Bedrooms: 3 Baths: 2 Full	<input checked="" type="checkbox"/> <input type="button" value="Map It"/> 30902 Clubhouse Dr #7 J Price: \$370,000 Bedrooms: 2 Baths: 3 Full	<input type="checkbox"/> <input type="button" value="Map It"/> 1506 N Baker St Price: \$439,000 Bedrooms: 4 Baths: 3 Full
<input type="checkbox"/> <input type="button" value="Map It"/> 14891 Clementine Ct	<input type="checkbox"/> <input type="button" value="Map It"/> 34294 Camino Capitran	<input type="checkbox"/> <input type="button" value="Map It"/> 1527 W 2nd St	<input type="checkbox"/> <input type="button" value="Map It"/> 301 Franklin St	<input type="checkbox"/> <input type="button" value="Map It"/> 31272 Palms Dr

- Define the Competition for the seller's property and click "Save"

Review the price range and competition area for your assigned properties. Click **Save** when you are done. You may [skip this step](#).

Define Competition

30902 Clubhouse Dr 7 J	Competition Area
 Laguna Niguel, CA 92677 Property Type: Condominium Price: \$370,000	
Price Range	
Map Instructions	

Resizing the colored box to include the area you want to include in the competitive analysis. Making this area slightly larger than it appears will improve your results.



6. Create the client's Listingbook Account by entering the client's Email Address, Relationship Options, and reviewing the Account Services and Seller Property Services; click "Save"

Edit the data below as needed. **Required items are in bold.** When you're done, click **Save**.

Listingbook Account

Client Name and Summary

First Name: Last Name:
Email:

Relationship Options

Relationship: **Active Client** is someone you know well or with whom you have a relationship. Active clients may have access to *tax values, area sales, DOM, and price history*. **Potential Client** is someone you don't know very well. Listingbook will automatically encourage them to contact you to "upgrade" their account.

Status:
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Quick Search
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Listing Display (Affects all Web accounts in this folder)

Days On Market

Display address, directions, and map location for listings viewed by this client.

Yes, all listings
 Yes, for commissions of at least
 No, all listings

Buyer Services

Home Finder Results
 Open Houses
 Edit Home Finder
 Notify of Criteria Change

Seller Property Services

Competition
 Monthly Summary



7. You have successfully added your seller to Listingbook. Click “Open Client Folder” to view their client folder

The screenshot shows a navigation bar with four items: 'Add Folder', 'Assign Property', 'Create Account', and 'Additional Services'. Below this is a panel titled 'Additional Services' for 'Client: Anthony Sands'. The panel contains a message: 'Remember to call your new client and make sure they add "mailservice@listingbook.com" to their contacts and/or address book to avoid any local SPAM filters. You can check their login status in your Client Manager.' Below the message are several links with descriptions:

- ▶ [New Seller Letter](#)
Send an introduction Letter to your new Seller Client
- ▶ [View Client's Competition Results](#)
View properties competing for this property's potential buyers
- ▶ [Open Client's Folder](#)
View information in the client's folder
- ▶ [Give Client a Home Finder](#)
If this client is looking for a home, enter search criteria
- ▶ [Create an Additional Listingbook Account](#)
Give a spouse, partner or family member an account

8. Call your client and make sure they activate their account; tell them to:
- Look for an activation email from Listingbook Messenger
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 - Know why they should use Listingbook
 1. It allows effortless communication with their agent about listings
 2. It gives easy, accurate and robust real estate searches
 3. It gives the client a private, customized account when and where they want it



Help

Listingbook offers many levels of Help: Video Tutorials, Printable Help, Recorded Webinars, and Customer Support. Also visit Listingbook's blog at www.listingbookblog.com for news and info

1. To locate Help within Listingbook, click "Help" from the Menu Bar



What's In Our Help Center?

1. **Video Tutorials** - Short videos that show you step-by-step HOW a particular feature works in Listingbook.
2. **Printable Help** - PDF Documents that you can save or print that provide step-by-step instructions.
3. **Recorded Webinars** - Pre-recorded webinars that show you the HOW and WHY of Listingbook. Register for upcoming live webinars by clicking the "Training Calendar" link.
4. **Listingbook Customer Support** - Click on the link located at the bottom of the Help Center to contact us at helpdesk@listingbook.com or 1-866-353-3456, option 1.