
HIGHLIGHTS

The following are a few of the exciting new features in Rapattoni MLS version 10.21:

- The new **Client Portal feature enables you to provide your clients with an interactive view of their own prospect cart** in a personalized Web page.
- The new Default E-mail Report Format field in your Agent Preferences lets you **reduce the number of steps it takes to e-mail listings by specifying the report format that you use most often**. The report you specify will automatically be selected each time you e-mail listings.
- **E-mail messages have an updated look and now include a “Provided by” section** with your contact information.
- The View Sent E-mail feature has been enhanced! **You can now see a history of your Auto-Prospecting e-mail messages** for the last 30 days, and the new **"Report Viewed" column** lets you see if clients have viewed the listings they were sent.
- You can now **find e-mail that was sent for a specific listing** within the last 30 days using the new Filters area near the top of the View Sent E-mail page.
- *And more!*

AGENT PREFERENCES AND PROFILE

- **New Default E-mail Report Format** – You can now reduce the number of steps it takes to e-mail listings by setting the report you use most often as your default! The new Default E-mail Report Format preference enables you to choose the report format that will be initially selected each time you e-mail listings using the E-mail button in the MLS toolbar and when setting up Auto-Prospecting for a new prospect.

CONTACTS/PROSPECTS

Client Portal

- **Give Your Prospects an Exclusive Client Portal Web Page** – The new Client Portal enables you to provide your clients with an interactive view of their own prospect cart in a personalized Web page. Here are a few highlights of this exciting new feature:
 - Clients can see all of the listings in their Newly Matched, Saved and Rejected tabs, and can even save and reject listings themselves!
 - Clients can check for newly matched listings at their convenience.
 - You can leave comments about a specific property for a client, and your client can also leave comments for you.
 - A “New Comments” alert lets you both know when new/unread comments have been posted.
 - Your contact information is featured right at the top of the page.

Setting up a Client Portal couldn't be easier! Simply click the check box next to the new Client Portal field in the Contact Information form.

1. Go to your Home Page, click Contacts then Contacts/Prospects. Select a contact by clicking his name to open the Modify Contact Information window as shown below. Enable the Client Portal field.

The screenshot shows the 'Modify Contact Information' form. The 'Client Portal' checkbox is checked, and a red arrow points to it with the text 'Client Portal field'. The form includes fields for E-mail, Cc, Alternate E-mail, Web Page, Primary Phone, Secondary Phone, Other Phone 1, Other Phone 2, Initial Contact Date, Birth Date, Closing Date, and Notes. The 'Prospect Options' section includes Auto-Prospecting, Send E-mail to Agent, Send E-mail to Prospect, Send E-mail to Cc, E-mail Report Format, Client Portal, and Reverse Prospecting.

Once the Client Portal field is enabled, two new links display: 1) the "Preview" link lets you see the Web page you've just created for your client, and 2) the "E-mail Client Portal Invitation" link lets you send an e-mail message to your prospect announcing their Client Portal (including a hyperlink they can use to gain access).

The close-up screenshot shows the 'Prospect Options' section. The 'Client Portal' checkbox is checked, and the 'Preview' and 'E-mail Client Portal Invitation' links are visible. The 'Auto-Prospecting' checkbox is unchecked, and the 'Send E-mail to Agent', 'Send E-mail to Prospect', and 'Send E-mail to Cc' options are set to 'No'. The 'E-mail Report Format' is set to 'SWMRIC Client Report'.

If you use the Auto-Prospecting e-mail feature, your client will receive an e-mail notification with a link to their Client Portal (instead of a link to a report) each time new listings are added to their Prospect Cart.

Your client will receive the following email message:

SETUP OPTIONS

Property Information prepared exclusively for : Pam East

Listings that match your criteria are available for you to view in your Client Portal. You can review property details, save or reject listings, and make comments. Click below to visit your Client Portal.

[View Listings](#)

Provided by:

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Swm Association Of Realtors

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888-223-8634

test@rapattoni.com

<http://www.mlshelp.com>

If you want to stop receiving property information e-mail messages from me, please click this link to unsubscribe.

If you do not see a View Listings link, copy this text to the address line in your browser:

<http://search.rapmlsga.com/ClientPortal.aspx?VInLTstHnUvz4Nen1E8g6XR/16/UUwkgAeqQy8Q7uFvP6TOl4We1FcAVHsXd290/n24+dIUg5DHrCvV2qfZxlqNg1GLz53OntB+og9aPig/gvU6CeKvPVf/IFVZX1nox1A27WtTeVKUtxwCn8+0w7mR2WTQit1JTX7cidOTM4/3IDNfJUC8fX3k1XCiK0&hidMLS=SWMR&hidEntryPoint=MW>

Your client clicks the blue [View Listings](#) link in the above message to display his customized Client Portal web page shown on the next page.

Swm Association Of Realtors

No Picture Available
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Prepared Exclusively For: Pam East

New Comments


Newly Matched (3) Saved (2) Rejected (1)

Residential (3)

Check All Newly Matched Page 1 of 1 Move 0 Selected Listings to: Saved

Listing #	Status	Price	BD	BA (FH)	Lot Sz	Sq Ft	Yr	Type
2609727	Active (03/03/06)	\$115,000	2	1 (1 0)	792	8910 sf	1945	SF
<p>New Comment Notice</p> <p>Very sharp updated home located near Macatawa and the State Park. Very tastefully made. Fresh paint, new floor in bathroom - new hot water heater - new plumbing and new septic system. Newer furnace, 3 season room and roof. Landscaping has been added and a new driveway, patio & porch. Easy access to 400 ft of Lake Michigan beach!!</p>								
2622056	Active (05/08/06)	\$115,900	2	1 (1 0)	864	7000 sf	1950	SF
<p>Address: 3536 Lakeshore Dr Holland 49424</p> <p>Marketing Remarks: Easy access to Lake Michigan! This home has been professionally remodeled, must see made. Fresh paint, new floor in bathroom - new hot water heater - new plumbing and new septic system. Newer furnace, 3 season room and roof. Landscaping has been added and a new driveway, patio & porch. Easy access to 400 ft of Lake Michigan beach!!</p>								
2623942	Active (05/22/06)	\$94,900	2	1 (1 0)	832	14400 sf	1930	SF
<p>Address: 1595 Perry St Holland 49424</p> <p>Marketing Remarks: Great Park Township starter home. Neat, clean and close to Lake Michigan beaches, bike paths and parks. Newer laminate flooring, vinyl siding and one year old roof. Possession at close.</p>								

Properties shown may not be listed by the featured agent/office.
 All information contained herein should be deemed reliable but not guaranteed, all representations are approximate, and individual verification is recommended.

New Comments Indicated On Contacts/Prospects Page – A new column on the main Contacts/Prospects page notifies you if a prospect has left new comments about a listing in their Client Portal. When the  icon displays in this column for a particular prospect, you should go to their prospect cart to view the new comment(s).


MLS QA Swmichigan - Microsoft Internet Explorer

SEARCHES LISTINGS TAX CABT CONTACTS LINKS ADMIN HELP Log Off SWMEIC

Contacts/Prospects 5 contact(s) found in Prospects 0 checked

Active Matched (0)

Group: Prospects (5) Go

Name	Prospect Cart	Phone	Send	Tasks	CRM
East, Pam	1 2 1 1 	55			
East, Shoop	1				
Lucaszko (185799)	2 3 1				
Lucaszko (176063)	1 1 1 1				
Selby, John	1 1 1				



* Prospect Cart counters: Newly Matched Listings / Saved Listings / Rejected Listings

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Logged on as: SHERI D HIXSON Generated: 10/4/06 3:34 PM RapattoniMLS

Prospect Cart and Auto-Prospecting

- Comments Enhanced and Integrated with the Client Portal** – You can now save multiple comments about a listing in the Prospect Cart and even share them with your client! If you have enabled the new Client Portal feature for a prospect, then both you and your client can add comments regarding a listing to share with each other. If you do not want your client to see a comment, simply click the “Private” check box when creating the comment (this check box displays only when the Client Portal feature is enabled for the prospect).

To access comments, click the  icon for the appropriate listing in the Prospect Cart. If your client has left a new comment about a listing in their Client Portal, the icon changes to  for that listing, indicating you have an unread comment.

In addition, the date and time that each comment was entered are now saved automatically, and display before each comment.

- Auto-Prospecting E-mail Enhanced with Reports** – Auto-Prospecting now sends newly matched listings to your prospects in the report format of your choosing. Previously, Auto-Prospecting e-mail messages displayed limited static information about each newly matched listing. Now, when your client receives an Auto-Prospecting e-mail, they can click a “View Listings” hyperlink to see up-to-date listing information in the report format that you selected for them.



From the main Contacts/Prospects page, click your prospect’s name and scroll down to the Prospect Options area to locate the new E-mail Report Format field.

If you do not select a report for your prospect, the system will use the default report format that is initially selected each time you click the E-mail button in the MLS toolbar. (NOTE: A new Agent Preference has been added to allow you to choose a Default E-mail Report Format. See the Agent Preferences section for more information.)



- New Prospect Cart and Auto-Prospecting Listing Limit** – To safeguard system performance, a maximum of 1,000 listings are now allowed in each tab (Newly Matched, Saved and Rejected) of a prospect’s cart. The system will not allow you to add listings to a tab that has exceeded 1000 listings. Also, when a prospect’s Newly Matched tab exceeds 1,000 listings Auto-Prospecting for that contact will be automatically disabled. To help you manage Auto-Prospecting, a notification will display the next time you log on to the MLS if one of your prospects is approaching, or has reached, this limit. In addition, if the limit is reached and Auto-Prospecting becomes disabled, this information will be noted on the main Contacts/Prospects page and in the related Contact Information form. To reactivate Auto-Prospecting you must reduce the number of listings in the prospect’s Newly Matched tab, and then click the Auto-Prospecting check box in their Contact Information form.
- Unsubscribed Date and Time Added** – If your prospect chooses to unsubscribe from Auto-Prospecting by clicking the link at the bottom of an Auto-Prospecting e-mail message, you can now see the date and time that they did so in their Contact Information form. Previously, the system only displayed “Prospect has unsubscribed.”
- Managing Your Prospect’s Listings is Easier** – The process of moving listings to the Saved and Rejected tabs is now faster and easier! Simply select the listings you want to move using the check boxes to the left of each listing and use the new links that display near the top of the page to move the listings to the Saved or Rejected tabs.



NOTE: This simplified process replaces the Save and Reject check boxes that previously displayed for each listing, as well as the Save All and Reject All check boxes that previously displayed in the Selection Options area of the Options pane.

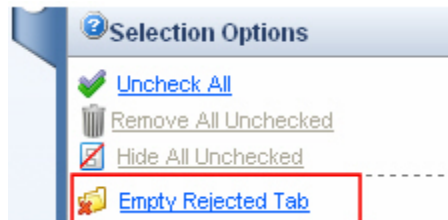
- **All Display Formats Now Available From the Prospect Cart** – The One Line Grid and Full Detail display formats are now available from the Prospect Cart.
- **Listings are Paginated in the Prospect Cart** – Large numbers of listings display faster, and are easier to work with because they display in manageable pages. This is now consistent with viewing search results and the Listing Cart.
- **Property Types Organized with Tabs in the Prospect Cart** – When viewing multiple property types, you can easily switch to view the listings for a particular property with a single click on the corresponding tab near the top of the Prospect Cart. This is now consistent with viewing search results and the Listing Cart.
- **New E-mail History and Tracking for the Prospect Cart** – You can now see many additional important details about e-mail sent to your prospect during the last 30 days. When viewing a prospect’s cart, simply click the new View E-mail History link in the Options pane to see e-mail history for that particular prospect. You can even determine if your prospect received e-mail using the “Report Viewed” column, which indicates whether the recipient clicked the “View Listings” link in a particular e-mail message. And you can easily switch between viewing “Manual” e-mail (sent using the E-mail button) and “Auto-Prospecting” e-mail, using the tabs near the top of the page. The Sent E-mail Information page for each prospect includes:
 - A Listing # filter that enables you to search for e-mail for a specific listing.
 - A Report icon  you can click to view the report that was sent to your prospect.
 - The “From,” “To,” “Cc” and “Bcc” e-mail addresses.
 - The subject and short note text (for manual e-mail only).
 - The date and time the e-mail was sent.
 - Whether the report was viewed by the recipient.
 - An E-mail icon  you can use to send the report again, if desired.

IMPORTANT: E-mail indicator icons that previously displayed next to individual listings in the Prospect Cart have been removed from the system. The enhanced e-mail history functionality described above replaces these icons.

- **Access Prospect Searches Right From the Prospect Cart** – The ability to access your prospect’s searches without leaving the Prospect Cart is back! Simply click the  icon near the top of the Prospect Cart to add, run, or revise a search, or to simply view the search criteria.
- **View Additional Prospect Information From the Prospect Cart** – The  icon now displays near the top of the Prospect Cart, enabling you to view additional information such as the contact’s address, phone numbers and Auto-Prospecting

settings without leaving the Prospect Cart. Previously, this icon was only available from the main Contacts/Prospects page.

- **Prospect Options Added to the Options Pane** – The Options pane now offers the following additional options from the Prospect Cart:
 - E-mail Client Portal Invitation – Send an e-mail message to your prospect announcing their Client Portal (including a hyperlink they can use to gain access).
 - View E-mail History – View details about e-mail that was sent to your prospect during the last 30 days.
 - Create New Task – Create a new task or appointment related to your prospect.
 - View Contacts – Go to the main Contacts/Prospect page (this link previously displayed in the secondary navigation bar).
- **Empty Tab Link Moved to the Options Pane** – You can now empty each of the three match tabs in the Prospect Cart (Newly Matched, Saved or Rejected) from the Selection Options area of the Options pane. The link that displays here changes based on the current active tab.



Contact Information

- **Contact Notes Capacity Increased** – The Notes field for each contact has been expanded to accept up to 1,500 characters. Previously, the limit was 1,000 characters.
- **New “Initial Contact Date” Field** – You can now track an Initial Contact Date for your contacts. This new field displays just above the Birth Date field in the Contact Information form.
- **4-Digit ZIP Code Extension Added to Contacts** – You can now track ZIP+4 for your contacts. The ZIP code extension prints on the Contact Report and Address Labels that can be generated from the main Contacts/Prospects page.


E-MAIL FEATURES

- **E-mail Messages Have a Polished New Look and Automatically Include Your Contact Information** – E-mail messages sent from within the MLS have an updated look and now include a “Provided by” section with your contact information. The “Provided by” information displays automatically based on your Agent Profile, and includes your name, company, address, contact phones and e-mail address.
- **New Read Tracking for E-mail Sent From Within the MLS** – You can now check to see if clients have viewed the listings that were e-mailed to them. Simply choose “View Sent E-mail” from the Admin drop-down menu, and locate the desired e-mail message. The new “Report Viewed” column near the right side

of the page displays “Yes” if the recipient (either primary or “Cc”) clicked the “View Listings” link in the e-mail message. This new feature is available for all e-mail sent from within the MLS during the last 30 days, including listings sent automatically through the Auto-Prospecting feature.

- **Auto-Prospecting E-mail Tracking Now Available** – The View Sent E-mail page now includes Auto-Prospecting E-mail sent during the last 30 days. Tabs near the top of the page let you easily switch between viewing “Manual” (e-mail sent using the E-mail button in the MLS toolbar) and “Auto-Prospecting” e-mail. Previously, this page displayed only manually sent e-mail.
- **Find E-mail for a Specific Listing** – You can now filter the View Sent E-mail page based on Listing #. Simply enter a listing number into the Filters area near the top of the page and click Search. The page will then display only e-mail in which that particular listing was included.

HOME PAGE

- **New “Client Portal Activity” Module** – The new Client Portal Activity module on the Home page makes it easy to see if any of your prospects have left new comments about listings in their Client Portal. When new comments are available, you can click the associated  icon in the module to read the comments right from the Home page. For more information on the exciting new Client Portal feature, see the Contacts/Prospects section.

LISTING DETAIL

- **Saving a Listing to a Prospect Cart from Listing Detail** – When saving a listing to a Prospect Cart from the Listing Detail page, the system now remains on the Listing Detail page instead of advancing you to the selected Prospect Cart. This functionality is consistent with saving a listing to a Prospect Cart throughout the system.

SYSTEM-WIDE CHANGES

- **Allowable Password Length Increased** – Your password can now be up to 12 characters in length.
- **“Delete Unchecked” is Now “Remove Unchecked”** – When viewing listings, the Options pane includes links that allow you to remove any unchecked listings. To help clarify this functionality, the “Delete Unchecked” links have been renamed “Remove Unchecked.”