



rDesk & rDesk "SearchPoint" IDX Quick Start Guide

Version 1.c

consolidated MLS
Serving Greater Fairfield County Since 1988

Personal Profile | Customer Care | Sign Off

Welcome CHRIS

Wednesday, February 20, 2008

Add Widgets | Customize Your Dashboard

Snapshot

0 Calls 0 Appts 0 To-Do's 0 Email 0 Flyer

Calendar

February 2008

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	1
2	3	4	5	6	7	8

Schedule

Today 2/20/2008

No Schedule

Today's Motivation

Nothing ever goes away. -- Barry Commoner (1917 -)

Weather

Norwalk, Currently
22° F, Afternoon clouds. Chilly.

Forecasted Low: 21° Hi: 33°

48-hour forecast | 7-day forecast

Real Estates News

- Borrowers deterred as rates post largest increase in months
- 30-year fixed rate at 5.92%; 10-year Treasury yield at 3.9%
- State Realtor group opposes legislation
- InmanTV: Fillmore Real Estate CEO discusses buyer outreach
- Franchise company will offer daily updates on for-sale data



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Screen examples used throughout this guide are for illustration purposes only and may not represent the appearance of your screens exactly.

*****Please Note: rDesk and rDesk “SearchPoint” IDX are provided as a no cost service by the GFC CMLS for all Participants and Subscribers.*****

Before you can take advantage of rDesk “SearchPoint” IDX, you must complete the IDX rDesk Order Form, located at the end of this guide.

If you are not the Broker or Manager of your office, you must have one of their signatures on the Order Form before your rDesk “SearchPoint” IDX functionality can be activated.

GFC CMLS Office: (203) 840-6674 (local to Norwalk); (800) 474-0101 (CT long distance)

Hours of Operation: Mon-Fri 8:30am-6:00pm; Sat 9:00am-2:00pm

Email: support@ct-mls.com

Online chat: Click the chat button on the GFC CMLS website when it's green (yellow means all technicians are busy).



**Technical
Support**

Fidelity Help Desk (800) 347-6367

M-F 7:00am-9:00pm

Sat 10:00am-4:00pm

Sun 12:00pm-4:00pm

You can also look for documentation and check the **GFC CMLS Knowledge Base** by going to the GFC CMLS website (<http://www.ct-mls.com>) and clicking on Support.

Welcome to rDesk & rDesk “SearchPoint” IDX

rDesk is the successful agent’s new *business control panel*. It is a web-based application that integrates vital productivity and business tools into a single, personalized real estate agent portal. rDesk generates leads, helps Realtors manage their businesses and unifies the information agents and brokers need to better serve clients and close more deals, complimenting the tools and technologies presently used by many real estate professionals

rDesk “SearchPoint” IDX is a listing search program that can be integrated into an agent’s personal website to provide the public with property data updated daily from the GFC CMLS system. Listing displays include pictures, street maps and *(if provided by the listing agent)* virtual tours, as well as school and neighborhood information. Consumers can elect to create personal profiles in which they can save searches and properties of interest, and request automatic e-mail listing updates of new properties that match their criteria. They can also easily contact you for additional information or to see the property.

Both rDesk and rDesk “SearchPoint” IDX are provided to GFC CMLS Participants and Subscribers as a no cost service enhancement!!!

RDESK & RDESK “SEARCHPOINT” IDX Q & A

Q: What is the difference between rDesk and rDesk “SearchPoint” IDX?

A: **rDesk** is a web-based application that integrates vital productivity and business tools into a single, personalized real estate agent portal. **rDesk “SearchPoint” IDX** is a listing search program that can be integrated into an agent’s personal website to provide the public with property data updated daily from GFC-CMLS.

Q: What does it cost for me to use the rDesk services?

A: Both rDesk and rDesk “SearchPoint” IDX are **FREE** services provided to all GFC-CMLS subscribers.

Q: Are there any requirements I need to meet in order to use rDesk?

A: There are no requirements to use the **rDesk** application. In order to take advantage of **rDesk “SearchPoint” IDX**, you need to have a personal website, and complete and sign the rDesk Order Form and fax it back to GFC-CMLS. If you are not the broker of your office, this form also needs to be signed by the broker or manager of your office.

Q: I have already sent in my completed rDesk Order Form. How do I access rDesk and rDesk “SearchPoint” IDX?

A: Open your web browser (Internet Explorer is recommended) and go to ***cmls.rdesk.com***. Use the same user name and password that you have been using for RE/Xplorer and/or Paragon. The page that opens is called the rDesk Dashboard, which is the main menu of rDesk. To access the “SearchPoint” IDX functionality, go to Marketing> IDX.

Q: How do I set up my personal information so it will appear on rDesk IDX search screens?

A: After logging into rDesk, click the **Personal Profile** link (towards the upper right of the screen) to add/modify your personal information. You can then choose which of this information will display on your banners by going to **Marketing> IDX** and clicking the Banners tab.

Q: Once I have gone through and configured my rDesk “SearchPoint” IDX, how do I get it to appear on my personal website?

A: Clicking the Links tab will allow you to open up an email to your website administrator and email the links to the different IDX searches. He/she will then need to make buttons or links on your website and have them point to the URLs that you emailed.

Q: Is rDesk “SearchPoint” IDX only available to agents, or can brokers use it as well?

A: Both agents and brokers can use rDesk “SearchPoint” IDX. However, if you are a Broker working with an IDX consultant to create a customized MLS search on your office’s website using a raw data feed from GFC-CMLS, rDesk “SearchPoint” IDX might not be what you are looking for. Contact the GFC-CMLS office to discuss this further.

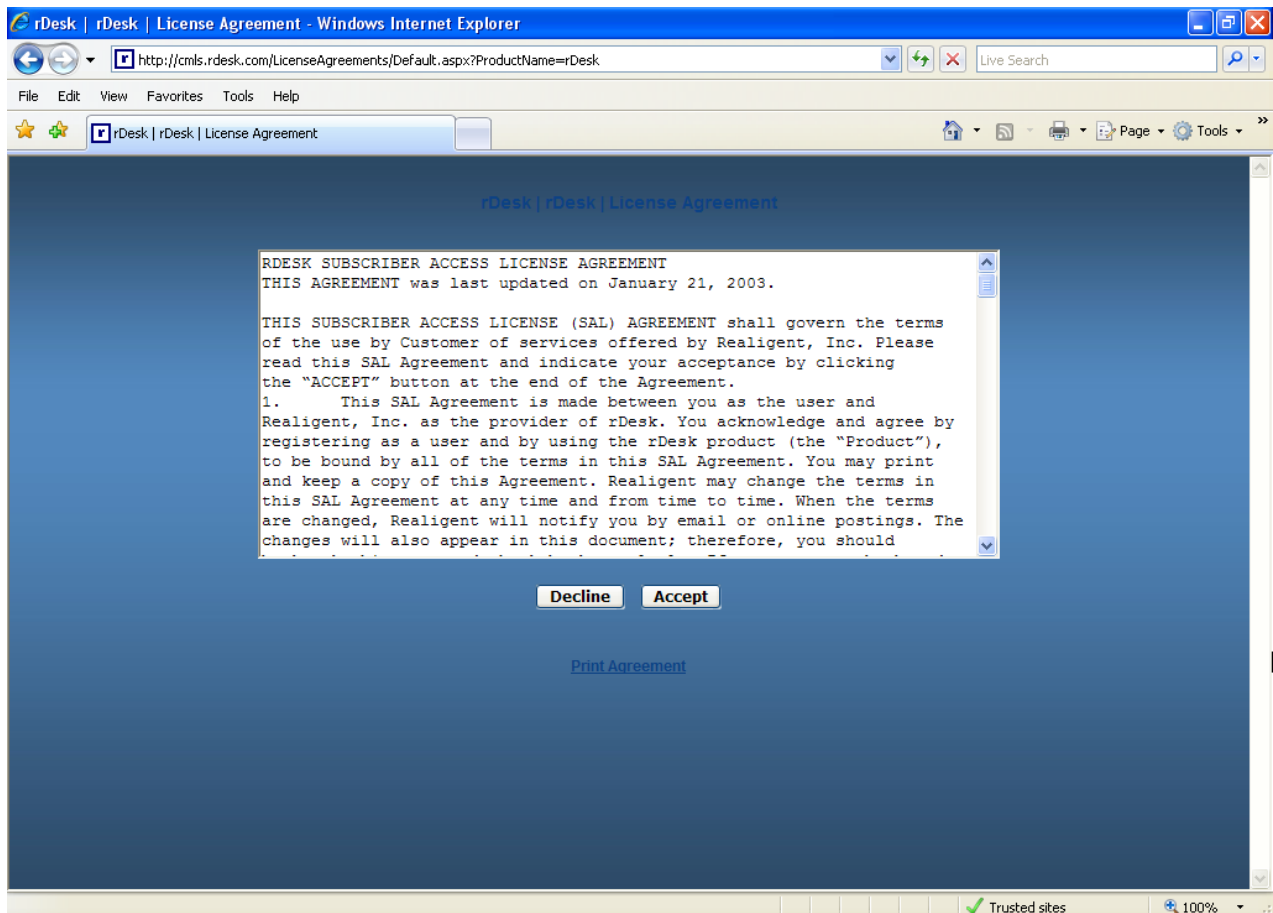
LOGGING IN

To log into rDesk, open up the Internet Explorer browser and enter ***cms.rdesk.com*** in the web address bar. To create a desktop shortcut to this screen, simply go up to the top left corner of the screen and click **File> Send> Shortcut to Desktop**. This will create an rDesk icon on your desktop.

Use the same ID and password that you have been using all along for other GFC CMLS programs (PC Access, RE/Xplorer, and Paragon).

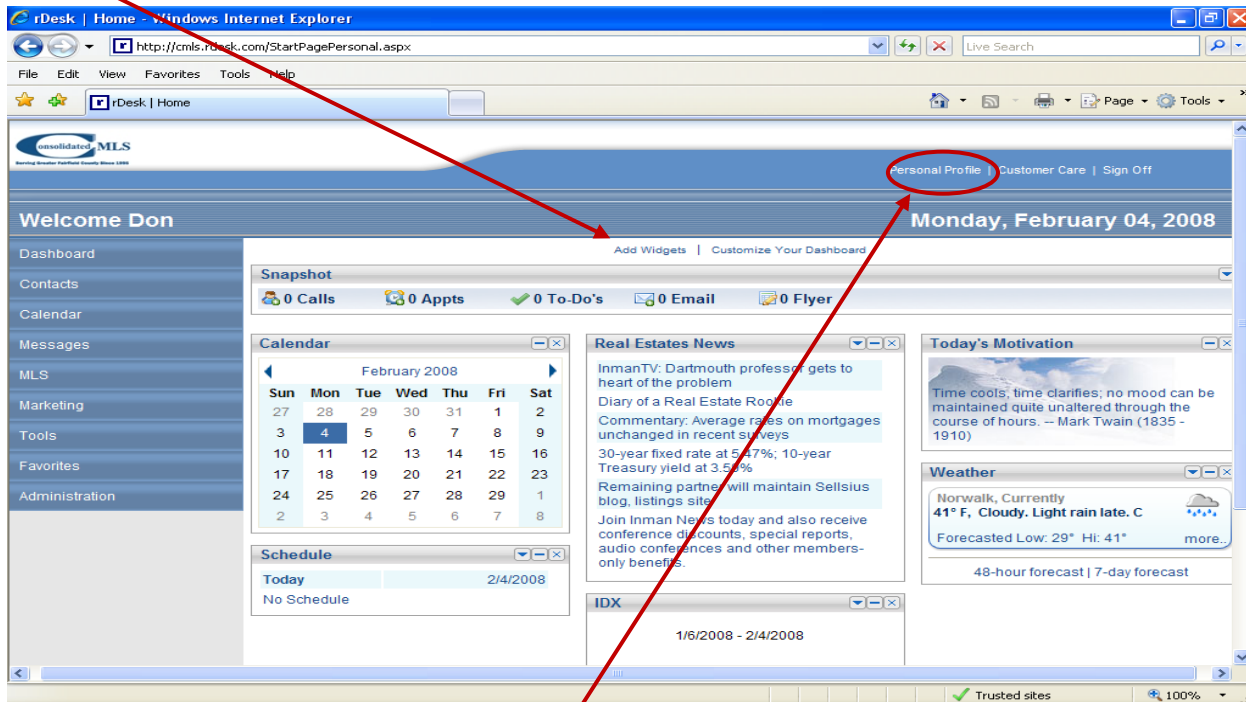


The first time you try to log into rDesk, a license agreement will appear on the screen, which you will need to accept before you'll be able to continue using the program.



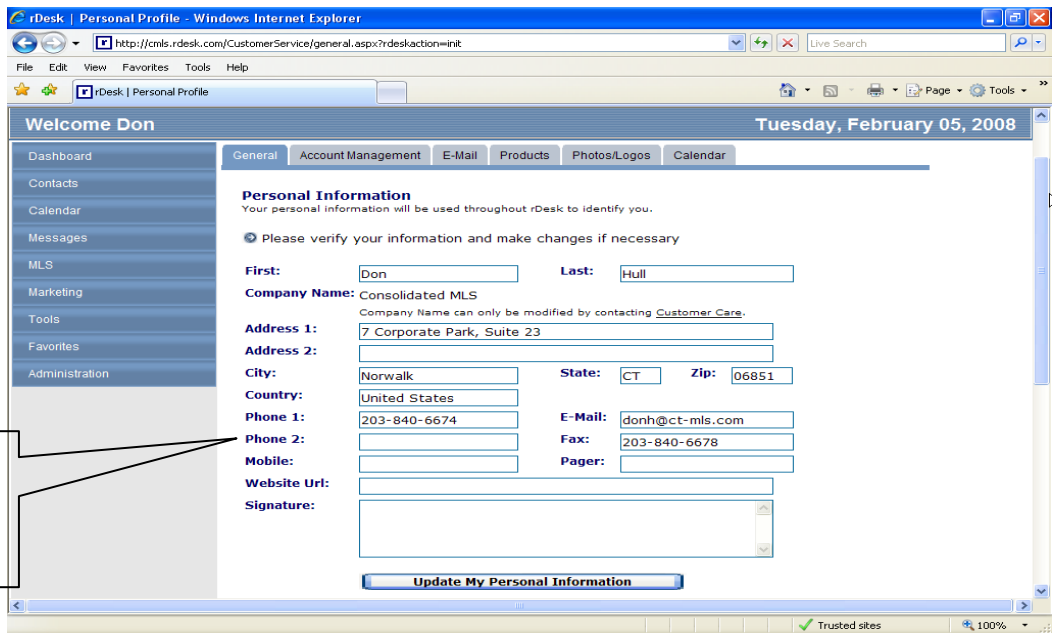
DASHBOARD

After you have accepted the license agreement, the rDesk Dashboard will appear. Essentially, the Dashboard functions as the homepage for the rDesk program. In the center of the page is a customizable section where you can choose from a predetermined list of “*Widgets*”, including a calendar, your local weather, links to Real Estate News articles, and your rDesk IDX usage charts. You can use the **Add Widgets** link to customize your Dashboard.



One of the first things you should do after logging in is set up your Personal Profile. Your personal profile information appears on IDX Reports, Flyers and other assorted documents and communications you create throughout rDesk. Click the **Personal Profile** link (towards the top right corner of the screen) to modify your personal information, add you agent photo/logo, etc. You can go into your profile as often as you need in order to update your information. Below is a screenshot of the Personal Information screen:

When loading your personal photo or logo, the recommended size is 150x200 pixels. For best results, your photo should be in a 3x4 ratio (ex: 1.5”w x 2”h).



Phone 1= Office Phone
 Phone 2= Direct Phone
 Mobile= Mobile Phone

NAVIGATION MENU

The Navigation Menu on the left side of the Dashboard functions as your main menu. The majority of the rDesk functionality is accessed from this area. This menu will appear on all screens within rDesk, making it very easy to move from one module to another. Below is a brief description of each item within the menu. Some of the menu items will be covered in more detail in subsequent sections.

Dashboard - functions as a Home button- regardless of where you are in rDesk, clicking the Dashboard button will bring you back to the Dashboard screen.

Contacts - opens the Contact Management portion of rDesk. Allows you to add or maintain Contacts, as well as import/export your contacts from/to your mail client (such as Outlook).

Calendar - allows you to schedule and maintain events and activities.

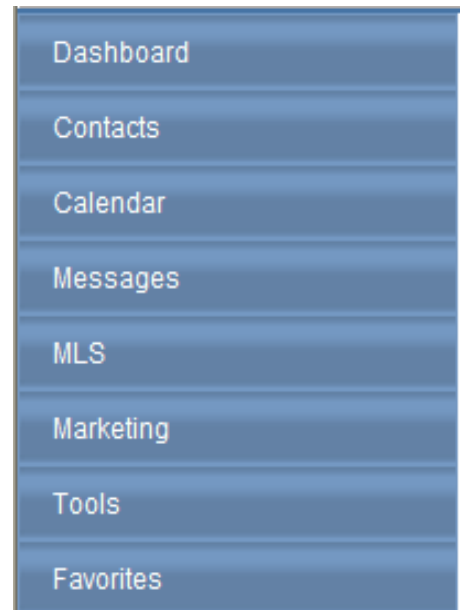
Messages - links directly to an internet email account (AOL, Yahoo, Gmail, etc.) for quick access to your email.

MLS - (*This item is currently not functional*).

Marketing - print listing Flyers, configure the settings on your personal IDX website, review and organize Action Plans, and create Neighborhood and School Reports.

Tools - access your Web Documents, create maps and driving directions, calculate mortgage payments, access a glossary of Real Estate terms, and more.

Favorites - set up links to your favorite websites.



MARKETING

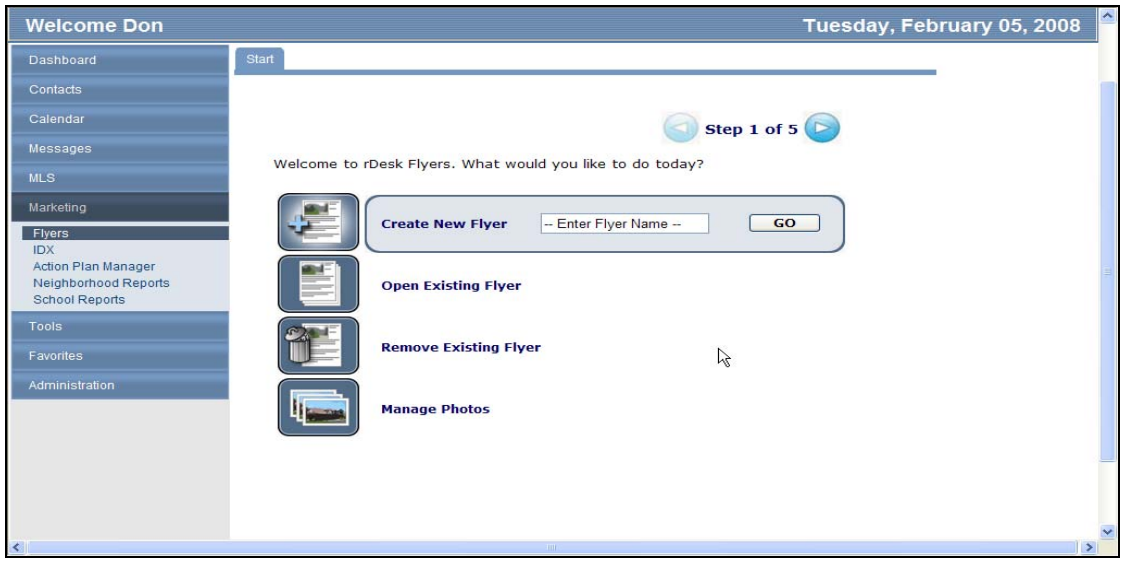
Within the **Marketing** menu, you will find the following functionality:

Flyers

The **Flyers** module allows you to create customized flyers for your listings or for any listing on the GFC CMLS. A wizard systematically walks you through the 5 step process. Use the arrows in the top right to

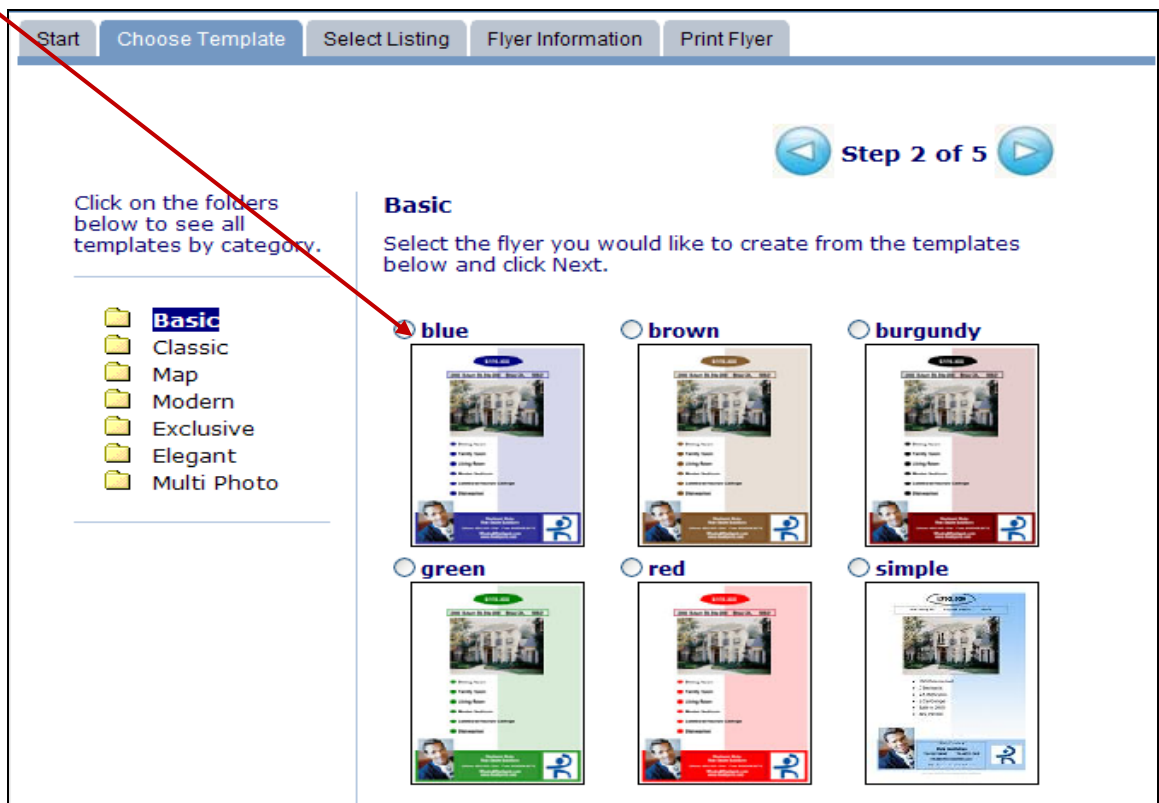


move between steps. **Step 1**, which allows you to create a new flyer or open an existing one, is displayed below:





After you have chosen to either create a new flyer or work with one you have already created, click the next arrow to move to step 2.

Step 2 allows you to select the style and layout of your flyer, based on a list of flyer templates. Each themed folder on the left includes its own selection of templates. When you find a template you like, put a dot in front of it, then move on to the next step.



In **Step 3**, you can choose the listing for which you'd like to create the Flyer. You can either pick one of your own listings (**Select MLS Listing**), or, if you want to create a flyer for one of your buyers, you can pick from any listing on the system (**Enter MLS Listing #**).

Start Choose Template **Select Listing** Flyer Information Print Flyer

 **Step 3 of 5** 

Please enter the MLS Listing # of the listing to be used for this flyer and then press the Next button.

Select MLS Listing Enter MLS Listing # Create Blank Flyer

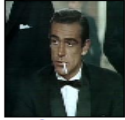


You also have the option to Create a Blank Flyer, which allows you to manually enter the property information.

Step 4 allows you to modify the flyer information, including your photo and office logo, the property's photo, your personal agent information, and the property information that will appear on the flyer.

Start Choose Template Select Listing **Flyer Information** Print Flyer

Step 4 of 5

Flyer Photos:

Agent Photo  change	Office Logo  change	Listing Photo  change
--	--	---

Header:

Header [add from list](#)

Agent Data:

First Name	<input type="text" value="Don"/>
Last Name	<input type="text" value="Hull"/>
Phone1	<input type="text" value="203-840-6674"/>
Phone2	<input type="text" value="203-840-6678"/>
Web Site	<input type="text"/>

Listing Data:

List Price	<input type="text" value="\$95,000,000"/>
Remarks	<input type="text" value="EXQUISITE MARBLE/HARDWOOD FLOORS 11 FIREPLACES. INDOOR/OUTDO POOLS. TENNIS COURT. EXTENSIVE DEPENDENCIES INCLUDE BANY GUEST/STAFF RESIDENCES. BILLIARD ROOM W/ BILLIARD TABLE. GRANITE"/>

Features:

Features1	<input type="text" value="20043 Square Feet"/>	add from:	listing features	other features
Features2	<input type="text" value="8 Bedrooms"/>	add from:	listing features	other features
Features3	<input type="text" value="10(full) 4(half) Bathrooms"/>	add from:	listing features	other features
Features4	<input type="text" value="6 Car Garage"/>	add from:	listing features	other features
Features5	<input type="text" value="Built In 1900"/>	add from:	listing features	other features
Features6	<input type="text" value="Barn"/>	add from:	listing features	other features

Once you are finished editing the flyer, click Generate Flyer to print it, or Email Flyer to send it via email.

If you choose to email the flyer, an email window will open within rDesk; complete the form and rDesk will automatically attach the flyer to the message when it is sent.

Step 5 is displayed below (this is the same screen you get if you click the Generate Flyer button). The Flyer will display in Adobe Acrobat Reader. If you get an error when trying to go to Step 5, it usually means

that you have an older version of Adobe Reader. You can download the latest version from the GFC CMLS website (http://www.ct-mls.com/MembersOnly/Support/Internet_Software/default.aspx).


Start Choose Template Select Listing Flyer Information Print Flyer

Step 5 of 5

1 / 1 46.1% Find

Your Dream Home


\$95,000,000



EXQUISITE MARBLE/HARDWOOD FLOORS 11
FIREPLACES. INDOOR/OUTDO POOLS, TENNIS COURT,
EXTENSIVE DEPENDENCIES INCLUDE BARN, 4
GUEST/STAFF RESIDENCES. BILLIARD ROOM W/
ELEVATOR STOP, SECRET PASSAGEWAY, PANELING
FROM 1700'S

- 20043 Square Feet
- 8 Bedrooms
- 10(full) 4(half) Bathrooms
- 6 Car Garage
- Built In 1900
- Barn

Don Hull
203-840-6674
203-840-6678

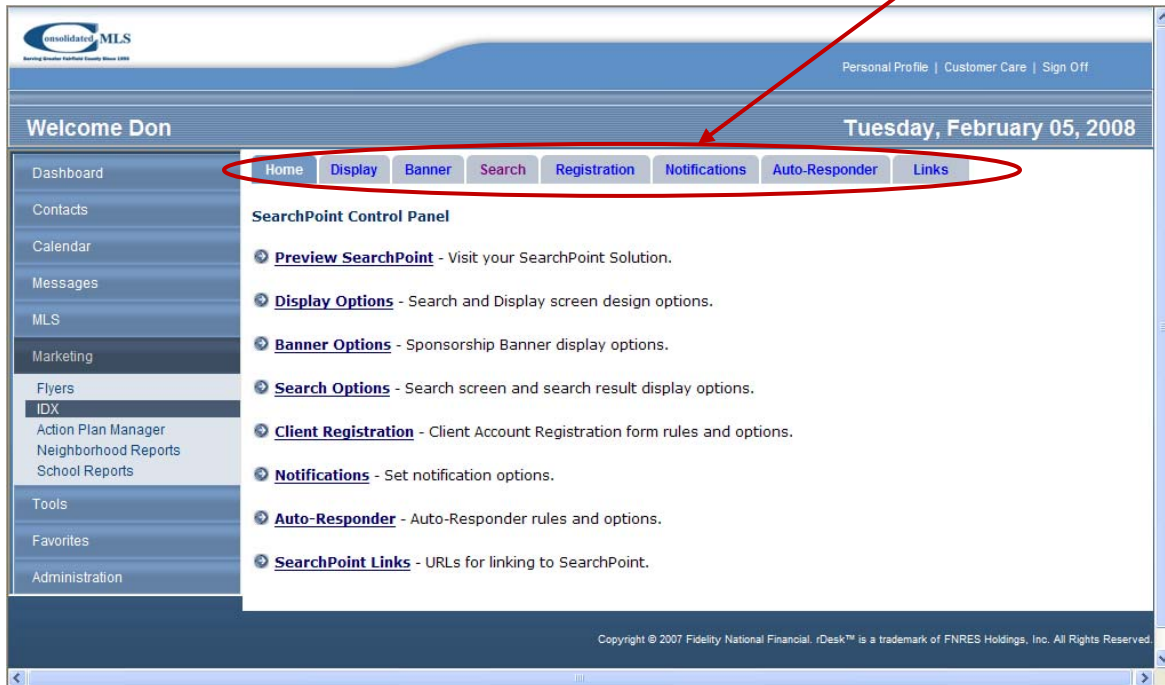


Information is believed to be accurate but not guaranteed

Problems viewing reports? Please install/reinstall the [Acrobat Reader](#).

rDesk "SearchPoint" IDX

Navigating to the IDX section of the Marketing menu opens up the SearchPoint Control Panel, which allows you to integrate MLS search capabilities into your existing personal website. This series of tabs allows you to configure how visitors to your website will interact with the IDX search functionality, including the types of searches they can perform and their ability to register with you for more comprehensive services.



- **Preview SearchPoint** - allows you to see a preview of how your rDesk IDX pages will appear to visitors to your website. Use this after you have made configuration changes to see how they look.
- **Display Options** - allows you to select a color theme for your search and display screens. You can also define the tools that visitors will have available to them when they perform searches and view properties.

Home Display Banner Search Registration Notifications Auto-Responder Links

➤ **Preview SearchPoint**

Display Options

➤ Select a color theme for the search and display screens.
Standard Themes

➤ Select which tools to enable.

<input checked="" type="checkbox"/> Map This Home	<input checked="" type="checkbox"/> Virtual Tours
<input checked="" type="checkbox"/> Print A Flyer	<input checked="" type="checkbox"/> Mortgage Information Section
<input checked="" type="checkbox"/> School Data	<input checked="" type="checkbox"/> Neighborhood Information Section
<input checked="" type="checkbox"/> Email Listing	<input checked="" type="checkbox"/> Neighborhood Info
<input checked="" type="checkbox"/> Client Toolbar ("My Portfolio", "My Searches", etc.)	
<input checked="" type="checkbox"/> Enable Listing Photo Slideshow with <input type="text" value="5"/> Second Interval	
<input checked="" type="checkbox"/> Request More Info: Send to <input type="text" value="Me"/>	

- **Banner Options**- configure the information and photos/logos that will appear on the banners on your search screen and property displays.

The data that populates these fields comes from what you enter on the **Personal Profile** screen (page 5 of this manual). If you want the information to appear on your banners, make sure to put a check in front of it and click the **Save Changes** button.

- **Search Options**- allows you to configure some of the options that visitors will see on the search screens and property displays.

- **Client Registration** - When a consumer visits your website and performs an MLS search, you can decide at what point, if any, they will be required to register with you and provide you with their personal information. This Client Registration tab allows you to configure the settings for registering visitors to your site.

Home Display Banner Search **Registration** Notifications Auto-Responder Links

[Preview SearchPoint](#)

Client Registration

☑ Create an intro and Closing Message to appear on the Client Account Registration form.

Registration Title

Intro Message

Closing Message

☑ You can require visitors to establish a SearchPoint Account before using certain sections of SearchPoint. Select at which point your visitors will be required to establish a SearchPoint Client Account.

- Before the search screen.
- After the search screen, before the summary search results screen.
- After the summary search results screen, before the detail listing screen.
- Only when the "My Searches" or "My Portfolio" options are used.
- Disable the SearchPoint Client Account feature.

☑ How would you like your returning visitors to register?

- Automatically register returning visitors
- Force returning visitors to always register

☑ What information would you like to capture?

Capture Information?
Required?

- Name and Email Address (note that this must be selected)
- Phone Number
- Address
- Password Hint Question
- Do you need to sell your current property yes/no question
- Are you working with another real estate professional yes/no question

- **Notifications**- you can have rDesk send you an email notification based on your visitors' activities.

Home Display Banner Search Registration **Notifications** Auto-Responder Links

[Preview SearchPoint](#)

Notifications

☑ Indicate if you would like to be notified by email when the following events occur in SearchPoint:

- Notify me whenever a new visitor registers on my site.
- Notify me whenever one of my SearchPoint clients receives an Email Search.

- **Auto-Responder**- configure automatic email messages for following up with your rDesk “SearchPoint” IDX customers. For the purposes of this guide, the Auto-Responder tab has been broken up into two separate screenshots.

- You can set up an automatic email for either or both of the following circumstances:
 - you get a new registration.
 - a visitor clicks the “**Request More Info**” link on a listing.
- Enter your message in the Message Text field (thank you for registering, thank you for requesting more information, etc.).
- The Status field is where you choose to make the auto response active. You must select the status for each auto response you are using. Making one Active does not automatically make the other active.
- Be sure to click **Save Changes** to save your preferences.

- Alert Type allows you to respond automatically to new searches that customers have saved or to notify customers of updates to existing searches.
- You have the option of creating your own text or using the default text provided. The Introduction Text will fill in accordingly.

- **SearchPoint Links** - rDesk "SearchPoint" IDX makes it very simple for your website administrator to merge the SearchPoint functionality with your website. Simply click the **Create Email** button at the bottom of the screen and it will open up an email form- enter your website administrator's email address and rDesk will send them the links that will integrate the searches with your website.

Home Display Banner Search Registration Notifications Auto-Response Links

Preview SearchPoint

SearchPoint Links

Enter your website domain if you will be linking to Searchpoint from an external website.

Web Site Domain (1):

Web Site Domain (2):

Web Site Domain (3):

Web Site Domain (4):

Web Site Domain (5):

Save

Map Search: Use the following URL to link to your Listing Map Search. Note: Depending on your Registration settings, this link may initially display the visitor registration form.

http://www.searchpoint.net/search.asp?org_id=CTCMLSGR&agent_public_id=fnres_a&mapsearch=1

Standard Search: Use the following URL to link to your Listing Standard Search. Note: Depending on your Registration settings, this link may initially display the visitor registration form.

http://www.searchpoint.net/search.asp? org_id=CTCMLSGR& agent_public_id=fnres_a& sponsor_office_id=fnres_o

My Listings: Use the following URL to link directly to your personal MLS listings. Note: Depending on your Registration settings, this link may initially display the visitor registration form.

http://www.searchpoint.net/list.asp? em=1& org_id=CTCMLSGR&agent_public_id=fnres_a& sponsor_office_id=fnres_o

Office Listings: Use the following URL to link directly to your office listings. Note: Depending on your Registration settings, this link may initially display the visitor registration form.

http://www.searchpoint.net/list.asp? em=1& org_id=CTCMLSGR&agent_office_id=fnres_o& agent_public_id=fnres_a

Generate custom links. To create new links, simply click on the "Add Search Link" button below, define your search, and then save your search. You will see the list of your previously saved searches and their links in the area provided below:

Search Name	Description
No Searches Found	

Add Search Link

To send an email with these links to your web site administrator, click 'Create Email' below:

Create Email

Once your website administrator gets the email, he/she can then create links or buttons on your personal website which will link to and display the appropriate rDesk IDX pages. For example, they can create buttons that read "Mapping Search", "Standard Search", "My Listings", and "My Office's Listings" and then have them correspond to the 4 links that you sent. Visitors to your site can then click on the buttons and the corresponding rDesk search screens will open.

NOTES
