

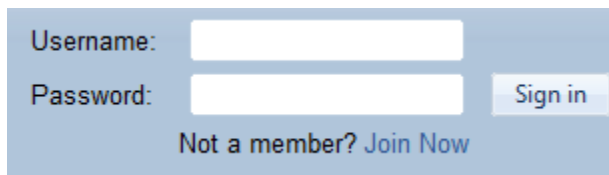
New Member Orientation

Congratulations on subscribing to **InTouch**, the automatic contact system for top of mind awareness. These tools will provide a wealth of information to help your contacts be better homeowners while creating customers for life. This unique point of difference will have immense benefits for your customers, clients and your business.

Together with your **InTouch** membership, you have access to all the financial apps and marketing materials. This information will help your buyers and sellers make better decisions and contribute to your unique branding. Some of the articles that will be sent from **InTouch** will reference these materials.

Website Address: <http://member.patzaby.com> or www.BetterHomeowners.com. This is the same address whether you're using a computer, PC or Mac, iPad or Smartphone.

Login – If you subscribed online, your password is your email address and you set your own password. If you subscribed at a live seminar, you received an email from us giving you a username which is usually your email address and a six character, alpha-numeric password. You can change your password once you're logged in.

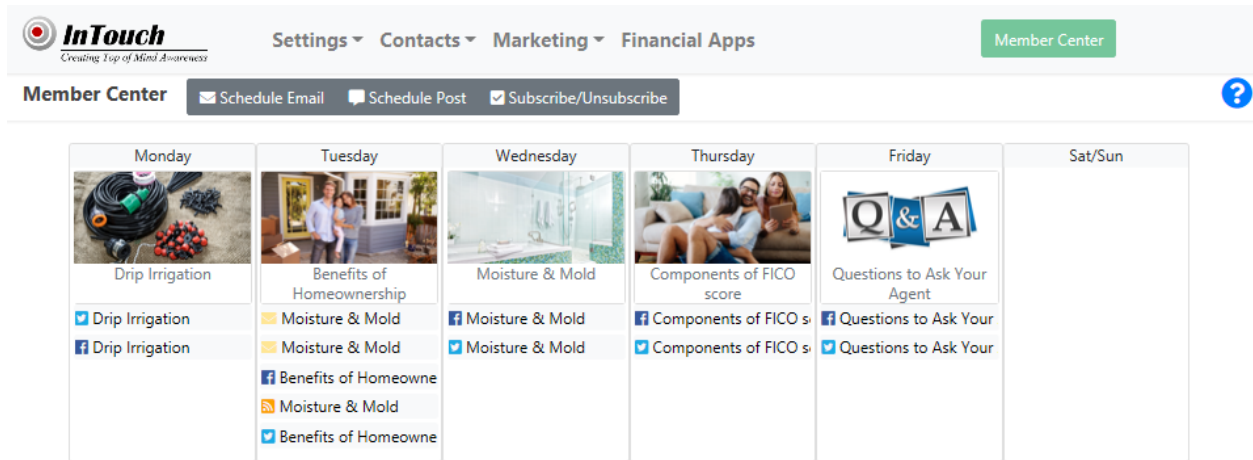


A screenshot of a login form with a light blue background. It features two input fields: 'Username:' and 'Password:'. To the right of the password field is a 'Sign in' button. Below the input fields is a link that says 'Not a member? Join Now'.

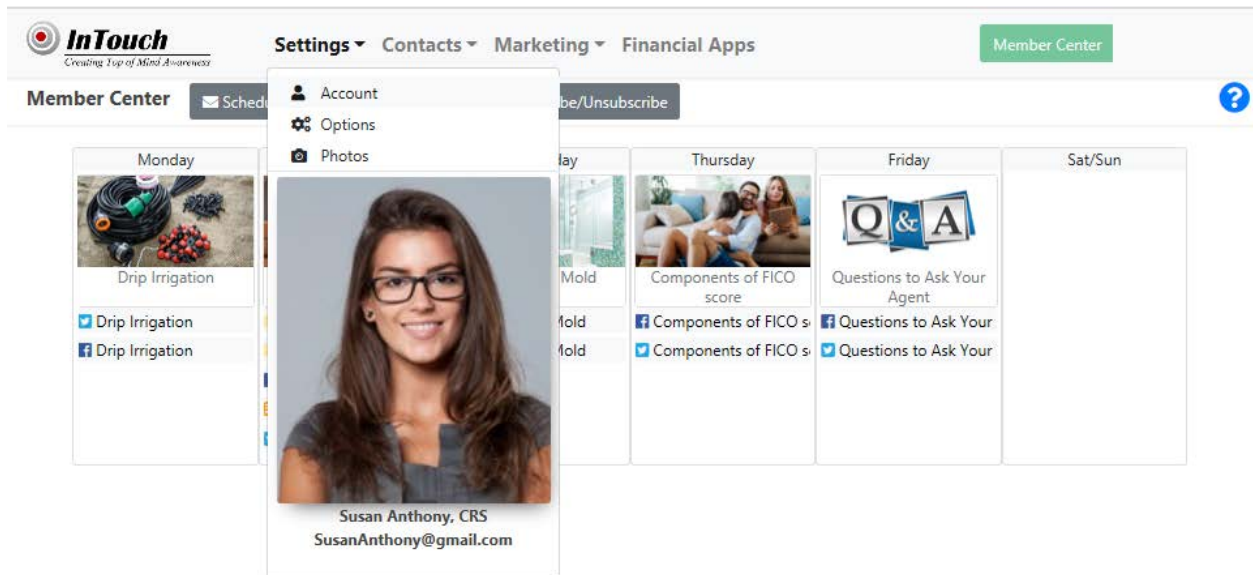
If you're having trouble logging in and decide to click the Reset My Password button, it really does reset your password and the old one will no longer work. You'll receive an email with the new username and six character, alpha-numeric password.

Customer Support is available at 972-743-9887 or Support@PatZaby.com Monday through Friday, 8:30 AM to 5:00 PM Central Time Zone. The support can help you with technical or training questions.

Member Center – once you log in, this is the screen that you’ll see. This will show you the items to be sent or posted for the week. Click on them individually to make changes or delete the mailing.




Toolbar – when using the toolbar to navigate to other areas on the site, select the menu items and a dropdown menu will appear. Mouse to your selection and click.

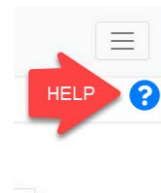


Checklist – Use this checklist to get started in an orderly and quick manner.

Follow the steps below to get it completely set up in about 30 minutes. After you login:

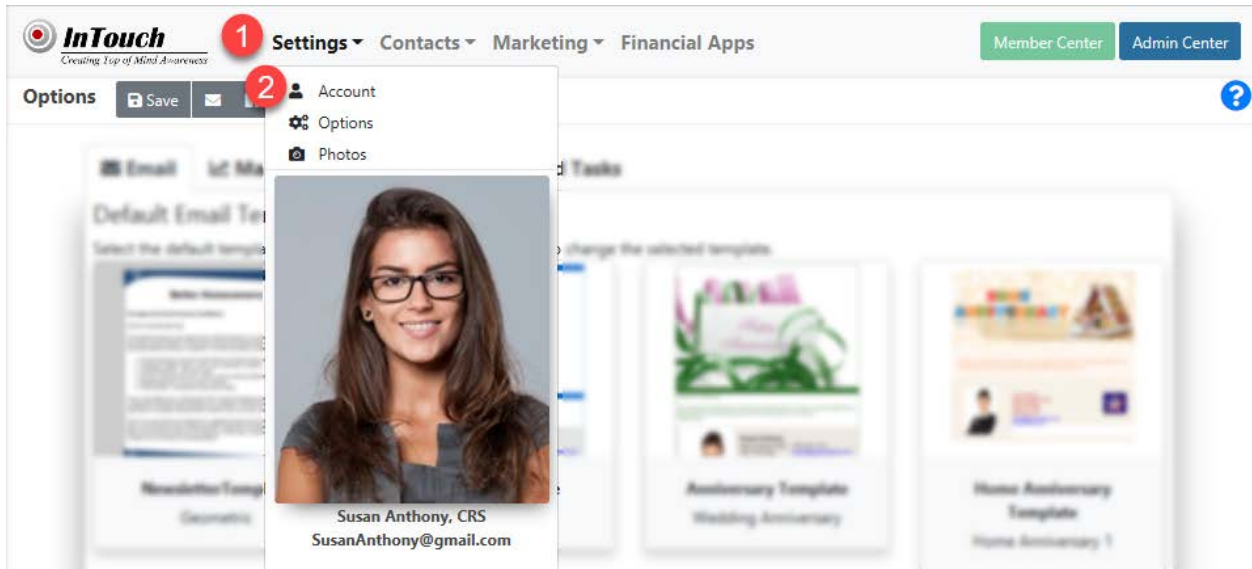
- Watch the new orientation video
- Use the Startup wizard found when you login for the first time. Use this URL <https://member.patzaby.com/app/startup.aspx> to access.
- Settings > Account –
 - Add your contact information
 - Change your password
- Setting > Photo – add your agent photo  and company logo
- Settings > Options > Email tab
 - Select newsletter template to be used
 - Select birthday email template
 - Select anniversary email template
 - Select option to automatically send birthday and anniversary cards
 - Select option to send special occasion messages
 - Signature Links – replace the corresponding URL from your personal website to each of the services you offer online
 - Home Search
 - Listing Alert
 - Home Values
 - Service Providers
- Settings > Options > Automated Tasks
 - Check automatically email article
 - Authorize Facebook posting to your business page
 - Authorize Twitter posting
 - Set blog for posting by email
- Import contacts to **InTouch**

Step-by-step directions are available in this orientation together with videos in the Help section of the **InTouch** website. You can also call 972-743-9887 for live support or email support@PatZaby.com during normal business hours, Central time zone, during the week.



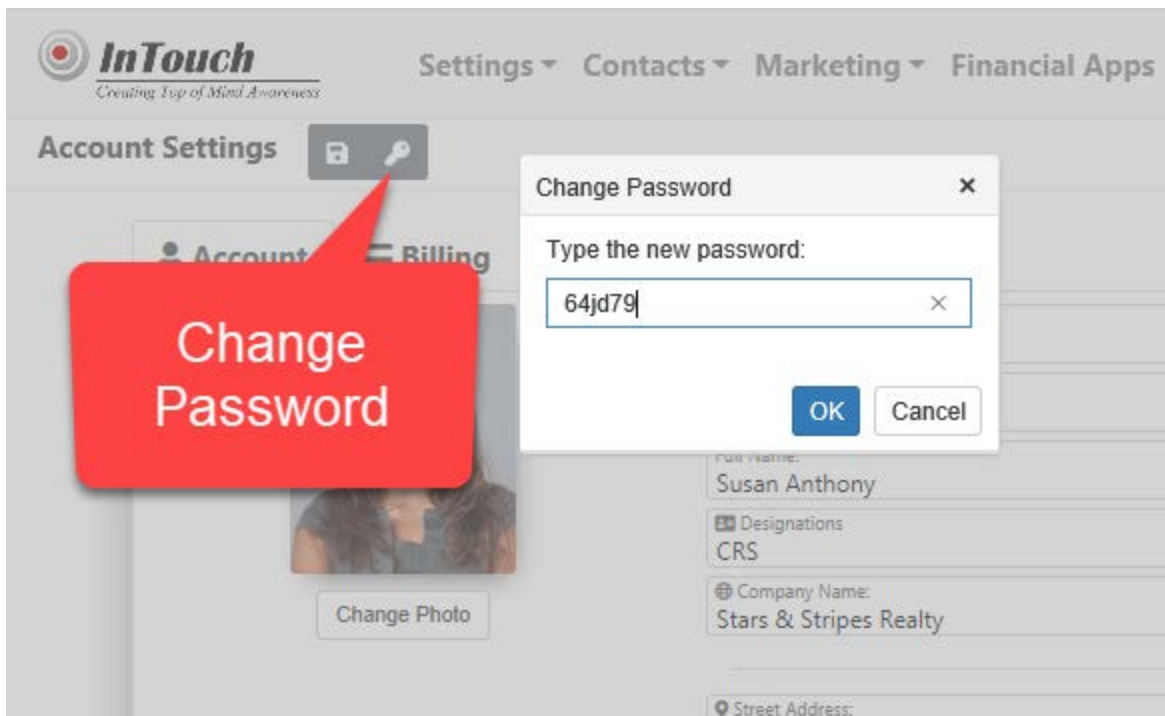
Settings > Account

After you've logged in, select Settings > Account to enter all your personal contact information.

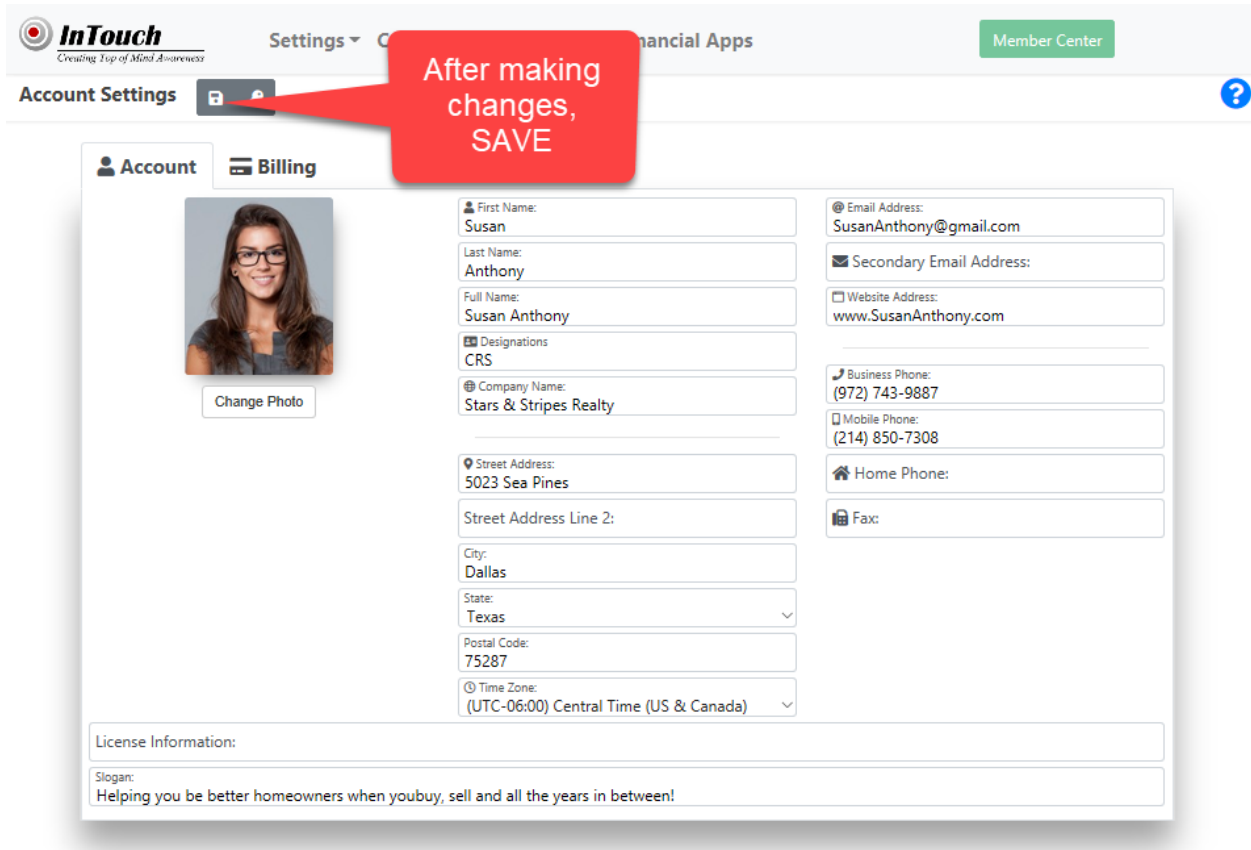


Settings > Password

To change your password, enter the old password exactly (upper and lower case are important). You then, enter the new password and are asked to repeat it to confirm that it is correct. When finished, click OK.




After making changes to this area, click Save



InTouch Creating Top of Mind Awareness Settings > Financial Apps Member Center

Account Settings Account Billing



Change Photo

First Name: Susan

Last Name: Anthony

Full Name: Susan Anthony

Designations: CRS

Company Name: Stars & Stripes Realty

Street Address: 5023 Sea Pines

Street Address Line 2:

City: Dallas

State: Texas

Postal Code: 75287

Time Zone: (UTC-06:00) Central Time (US & Canada)

Email Address: SusanAnthony@gmail.com

Secondary Email Address:

Website Address: www.SusanAnthony.com

Business Phone: (972) 743-9887

Mobile Phone: (214) 850-7308

Home Phone:

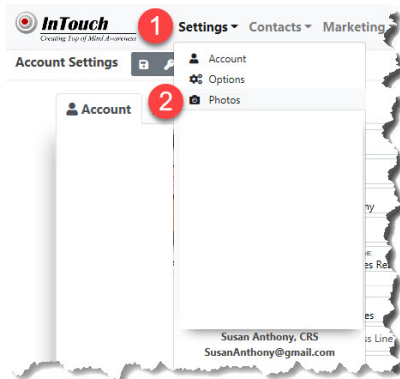
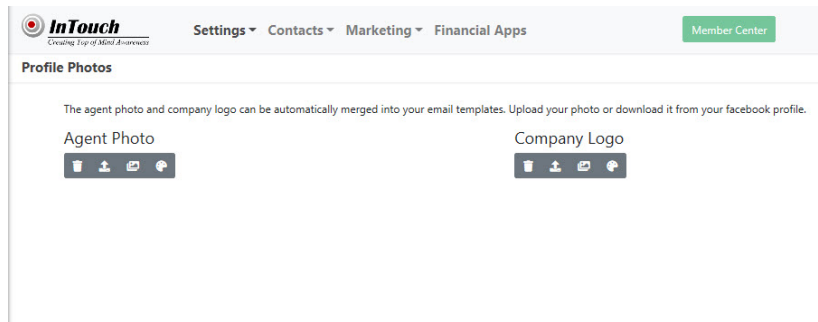
Fax:

License Information:

Slogan: Helping you be better homeowners when you buy, sell and all the years in between!

Settings > Photos

Upload personal photo and company logo. Select the picture from your computer and click Save. Use a low resolution, small file size picture.

InTouch Creating Top of Mind Awareness Settings > Contacts > Marketing > Financial Apps Member Center

Profile Photos

The agent photo and company logo can be automatically merged into your email templates. Upload your photo or download it from your facebook profile.

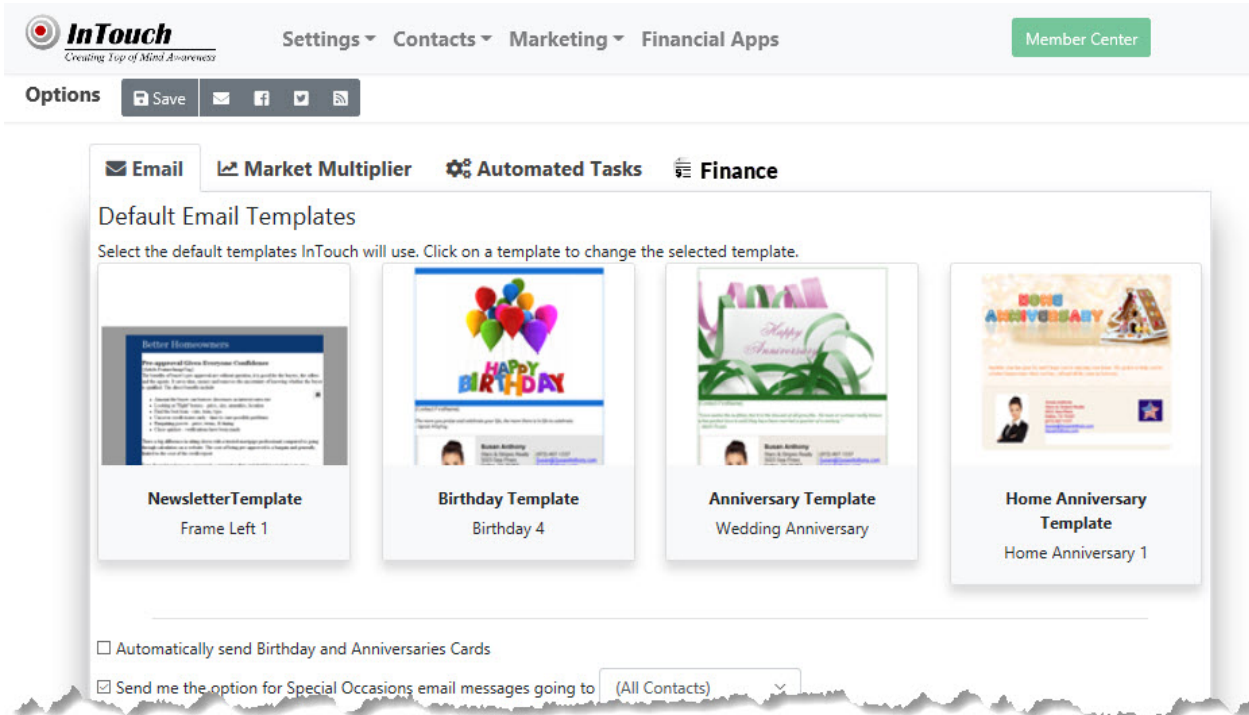
Agent Photo

🗑️ 📁 📧 🔄

Company Logo

🗑️ 📁 📧 🔄

Settings > Options







InTouch Settings > Contacts > Marketing > Financial Apps Member Center

Options Save [Email] [Facebook] [Twitter] [LinkedIn]

Email Market Multiplier Automated Tasks Finance

Default Email Templates

Select the default templates InTouch will use. Click on a template to change the selected template.

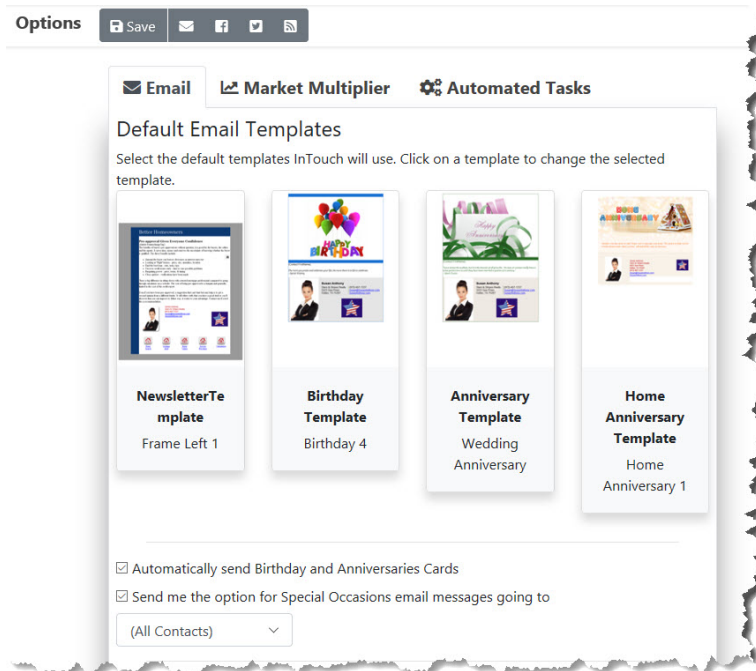
Template Name	Preview
NewsletterTemplate Frame Left 1	
Birthday Template Birthday 4	
Anniversary Template Wedding Anniversary	
Home Anniversary Template Home Anniversary 1	

Automatically send Birthday and Anniversaries Cards

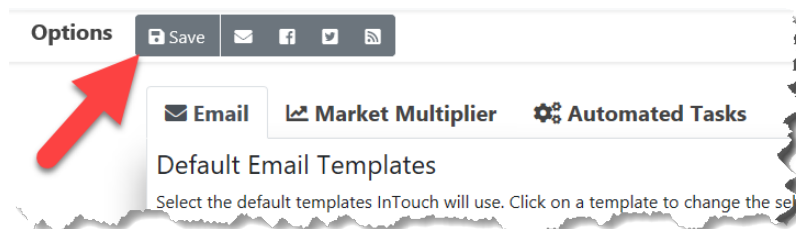
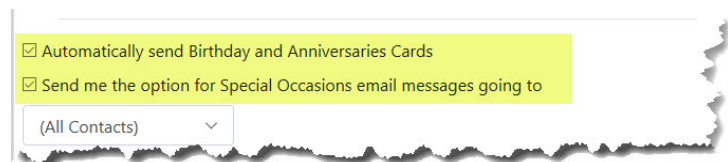
Send me the option for Special Occasions email messages going to (All Contacts)

Settings > Options > Email Templates tab

1. Click on each template type to select the style to be used for your newsletter, birthday and anniversary cards. If you want to modify the newsletter template, go to Marketing, Design Gallery and open Newsletters. The name of the newsletter and colors are easily changed there.



2. Individually, select the default templates you want to be used for your newsletter, birthday, anniversary and home anniversary
3. **When finished, Click the Save button**



Email > Signature Links

When each article is emailed to your contacts, there are buttons offering additional services which by default are linked to email messages. You can redirect them to your personal website if you offer the services there.

- Open your personal website; click on the home search button; when the page appears, select the URL and copy (CTRL+C)
- Return to **InTouch** profile; paste (CTRL+V) copied URL into Home search field to replace existing address
- Repeat the process for as many services as you offer on your website
- When finished, click Save button.



Options








 Email
  Market Multiplier
  Automated Tasks

Default Email Templates

Select the default templates InTouch will use. Click on a template to change the selected.

Signature Links

Type the address for the services, if you do not have an internet address your email address will be used.

-  Home Search:
 SusanAnthony@gmail.com?Subject=Send me a report on homes for sale
-  Listings Alert:
 SusanAnthony@gmail.com?Subject=I want to receive info on new listings by email
-  Home Values:
 SusanAnthony@gmail.com?Subject=Contact me about home values in our area
-  Service Providers:
 SusanAnthony@gmail.com?Subject=I need a recommendation of a service provider
-  Financial Applications:
 member.patzaby.com/calculators.aspx?a=e4G77cD2X0uiufdTY5faEA

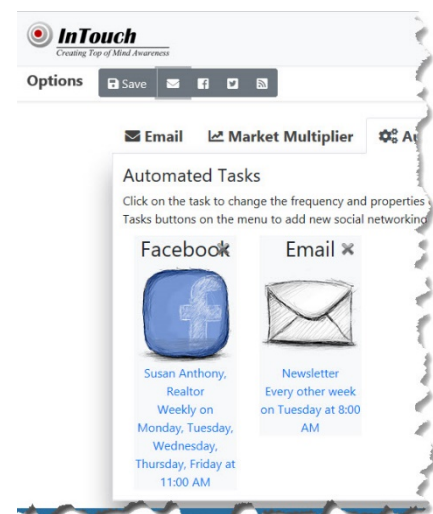
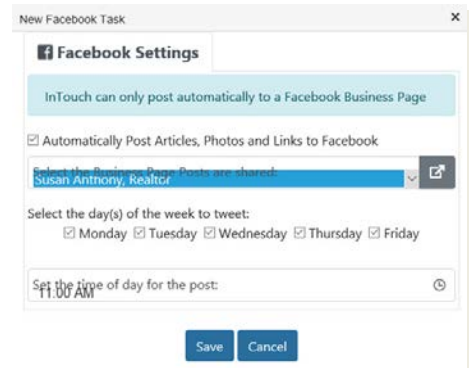
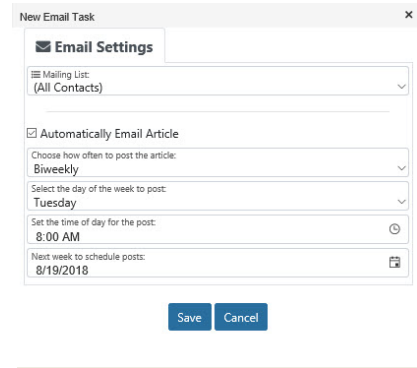
Settings > Options > Automated Tasks tab



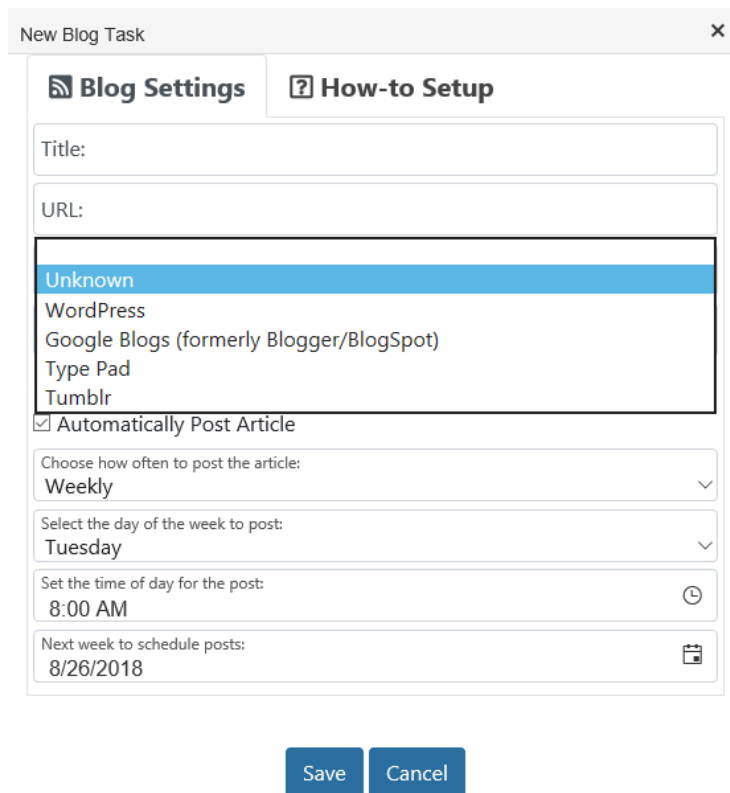
- a. Select Email Task button; when the dialog opens:
 - i. Check automatically email article
 - ii. Select the mailing frequency – weekly, bi-weekly, tri-weekly or monthly
 - iii. Select the day of the week to send the mailing – Monday through Friday
 - iv. Select the time of the day for the email
 - v. Adjust date for first delivery if necessary
 - vi. **Select Save to close Email Task**

- b. Select Facebook Task button; when dialog opens:
 - i. Click the Allow **InTouch** to access your Facebook button. A separate dialog may open that has an authorization code; copy and past that into the **InTouch** Facebook Task dialog.
 - ii. When dialog opens, check automatically post articles, photos and links
 - iii. Select the Business Page to post (you can post to each of your business pages)
 - iv. A post is available to be posted Monday through Friday. Uncheck days you don't want posted.
 - v. Select the time of the day you want it posted to Facebook
 - vi. **Select Save to close Facebook Task**

- c. Select Twitter Task button; when dialog opens:
 - i. Click the Allow **InTouch** to access your Twitter button
 - ii. When new browser window opens, select Authorize app
 - iii. A post is available to be posted Monday through Friday. Uncheck days you don't want posted.
 - iv. Adjust the date of the first post if necessary
 - v. **Select Save to close Twitter Task**



- d. Select Blog button; when dialog opens:
 - i. Enter the title of your blog
 - ii. Open your blog in an Internet browser and copy the URL and paste in the **InTouch** dialog.
 - iii. Select the blog Host from the dropdown list
 - iv. Enter the Email address to post the blog. Select How-to Setup tab in this dialog to get instructions for your specific blog Host.
 - v. Select Automatically Post Article
 - vi. Select the frequency to post; weekly is recommended
 - vii. Select the day of the week to post; Monday through Friday
 - viii. Select the time of the day for the post using the clock icon
 - ix. Select the date for the first post using the calendar icon
 - x. **Select Save to close Blog Task**



New Blog Task

Blog Settings **How-to Setup**

Title:

URL:

Unknown
WordPress
Google Blogs (formerly Blogger/BlogSpot)
Type Pad
Tumblr

Automatically Post Article

Choose how often to post the article:
Weekly


Select the day of the week to post:
Tuesday

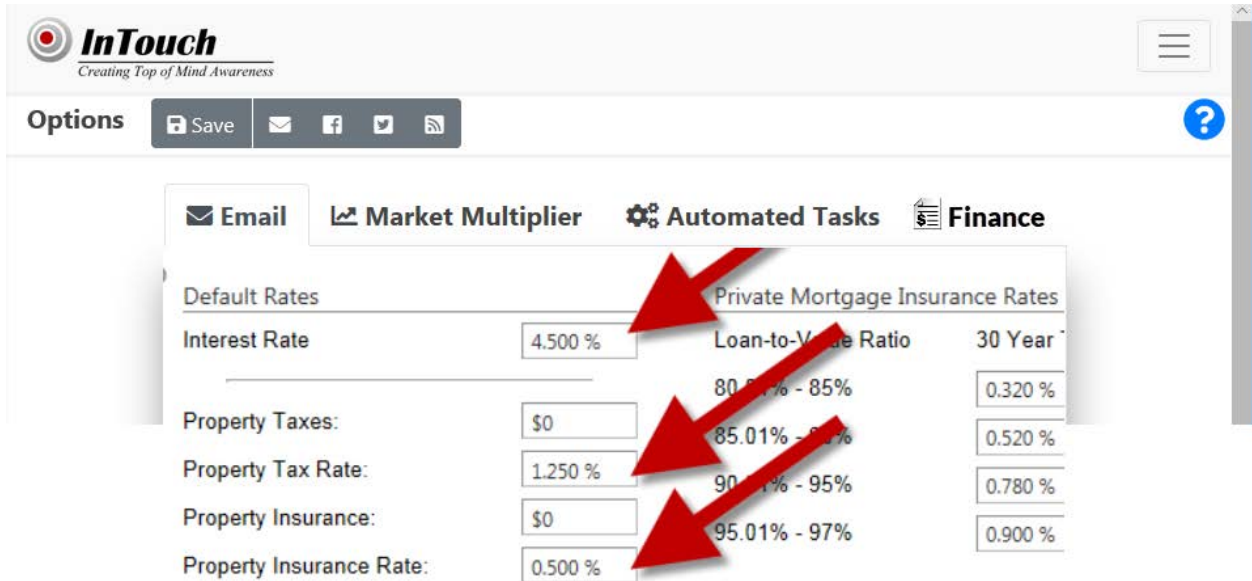
Set the time of day for the post:
8:00 AM

Next week to schedule posts:
8/26/2018







Save Cancel

Settings > Options > Finance tab

- Replace the current interest rate – this is needed to be done regularly so that when consumers use the apps, the current rate will automatically appear
- Enter an approximate property tax rate that would represent the taxes for the homes you typically sell (property taxes as a percentage of sales price)
- Enter an approximate property insurance rate that would represent the insurance for the homes you typically sell (insurance as a percentage of sales price)
- When finished, Click the Save button** 



InTouch
Creating Top of Mind Awareness

Options      

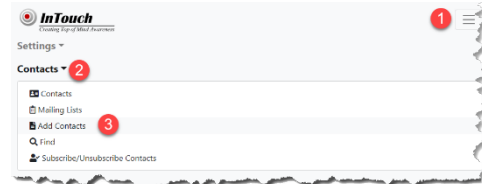
Email **Market Multiplier** **Automated Tasks** **Finance**

Default Rates		Private Mortgage Insurance Rates	
Interest Rate	<input type="text" value="4.500 %"/>	Loan-to-Value Ratio	30 Year
Property Taxes:	<input type="text" value="\$0"/>	80.01% - 85%	<input type="text" value="0.320 %"/>
Property Tax Rate:	<input type="text" value="1.250 %"/>	85.01% - 90%	<input type="text" value="0.520 %"/>
Property Insurance:	<input type="text" value="\$0"/>	90.01% - 95%	<input type="text" value="0.780 %"/>
Property Insurance Rate:	<input type="text" value="0.500 %"/>	95.01% - 97%	<input type="text" value="0.900 %"/>

Settings > Contacts > Add Contacts

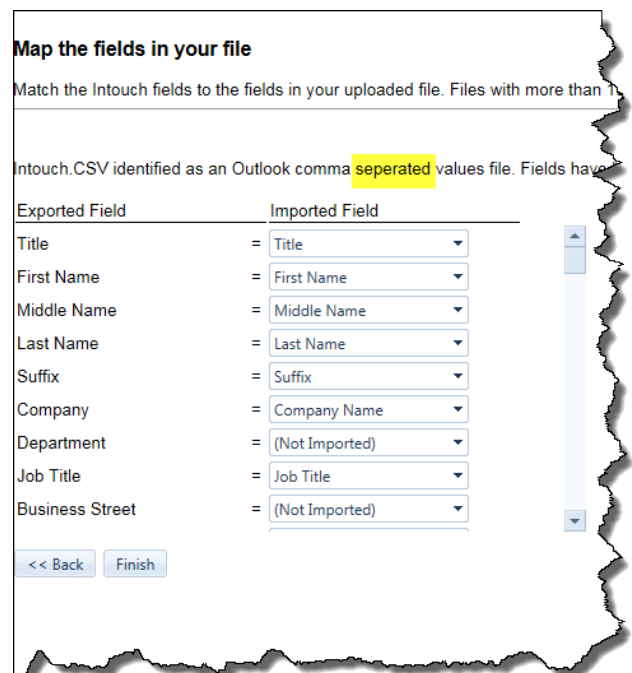
Contacts may be added individually by typing, by cut and pasting email addresses or by importing the names from a comma separated value file.

1. Select the **InTouch** menu **1** and from the drop-down menu, Contacts **2** and Add Contacts **3**
2. A wizard will appear that will take you through the steps
 - a. Select the mailing lists you want and/or if not going to use mailing lists, click **Next**
 - b. Select from the way you want to add the contacts. Importing the records from a CSV file will be the fastest way. Check the box that you agree that you have a relationship with the contacts and will not be spamming strangers. Click **Next**
 - c. Upload your files by clicking on the **Select** button. When the dialog opens, navigate to the location of the file and double-click the file. The dialog will close and the address of where the file is located will appear in the field next to the Select button. Click the **Next**
 - d. Map the fields – The left side of the screen will show you the fields in each record in the file that you exported. You will select from the drop-down list next to each of those field where you want that to be imported into the **InTouch** contact record.



In some instances, you will not find the same name and will have to decide on the best “fit”. You can scroll down on the list if you have imported more fields than you can see in the wizard.

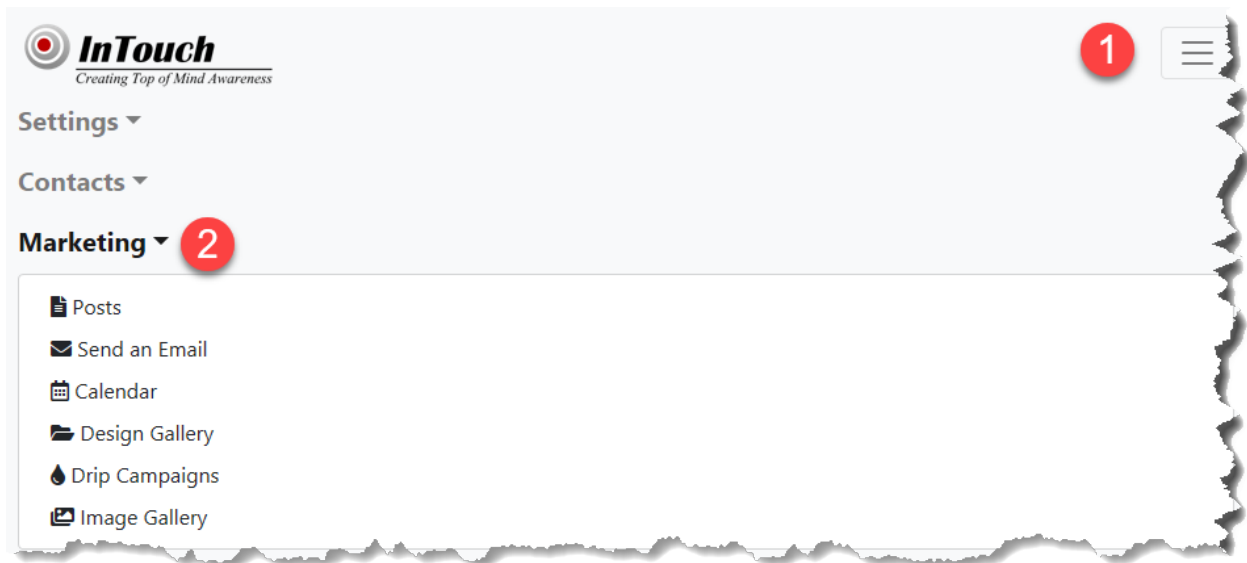
Once, you mapped all the fields, click **Finish**



If you want to add additional names, you can import them or type them into new contact records directly. You can even export a complete list from your database program again and import it into **InTouch**. It will recognize the new names and not duplicate the others.

InTouch will manage the subscription in case one of your contacts chooses to no longer subscribe.

Marketing >



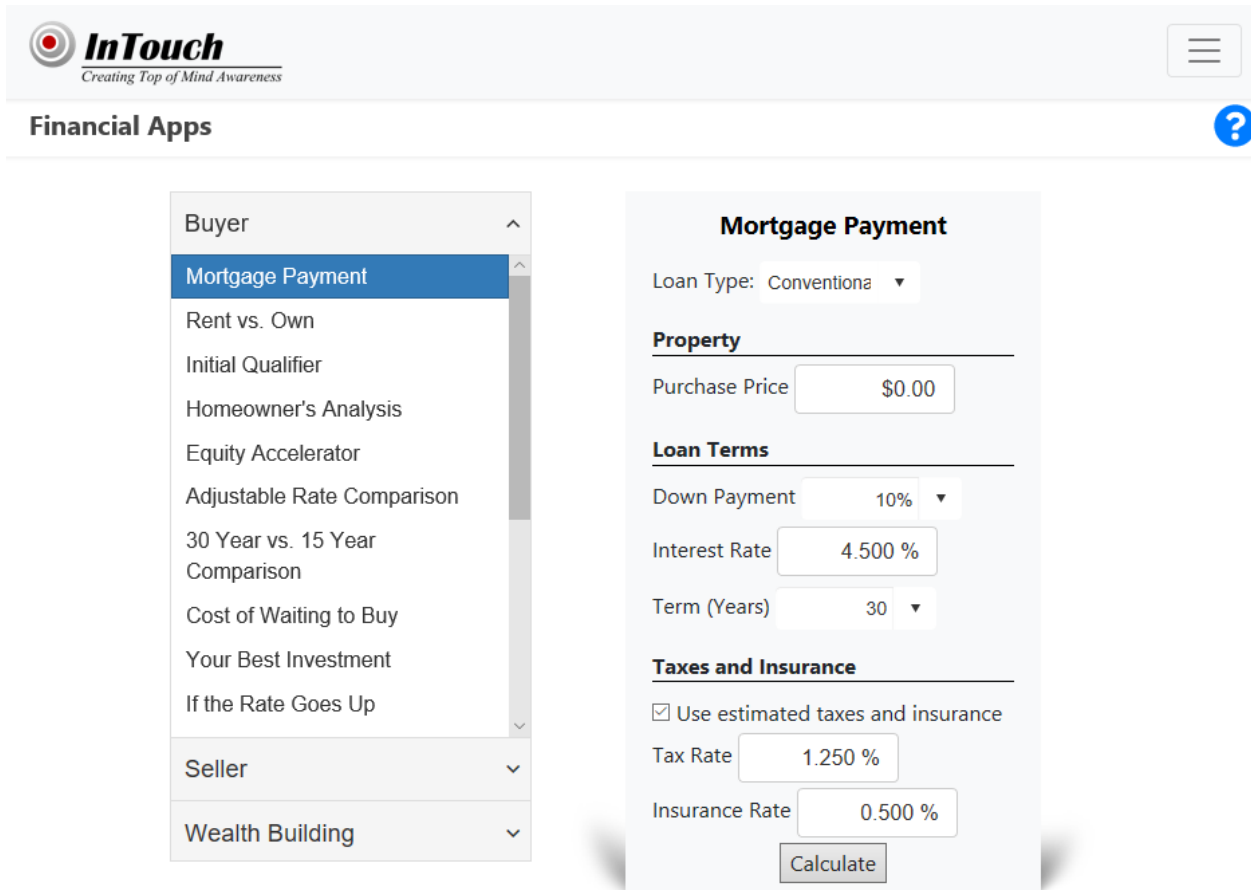
There are a variety of different marketing pieces that you are encouraged to explore and become more familiar. They are not part of the initial setup.

- Posts – a chronological list of the previous posts will appear with the most recent at the top of the list. You can search by topic to find available posts. You can also create your own unique post by clicking the Create a New Post button.
- Send an Email – allows you to send a mass email to your mailing list from the current templates or to create your own.
- Calendar – This will show you the posts that have been sent and by selecting one, you will be able to see a report showing how many messages were sent, opened, bounced, unsubscribed and links followed.
- Design Gallery – This gallery contains the templates for newsletters, birthdays, anniversaries, holidays and special occasions. There are also templates for the drip campaigns, listing promotions and customer appreciation events.
- Drip Campaigns – These are action plans designed to achieve marketing pursuits on a specific individual basis. They can be used “as is” or can be modified. New campaigns can be created.
- Image Gallery – The images used in the agent fields like picture and company logo are stored here. Other images used in social media posts and newsletter articles.

Financial Apps



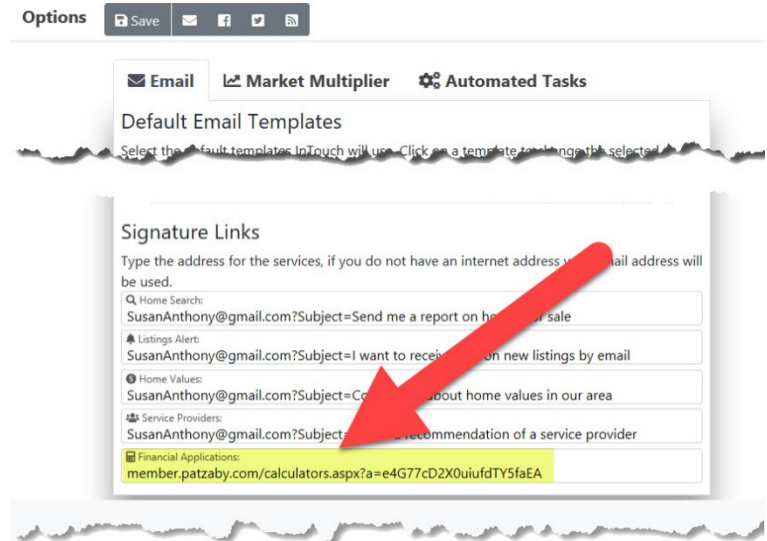
The menu to the financial apps is shown here. Select the menu, Financial Apps and move the mouse to the app you want to select. It will launch that app to the right of the list available. There are calculators for buyers, sellers and wealth building.



Embed & Link

The HTML code is available that can be used to make all these calculators available on your website. The advantages can be to provide valuable content for consumers and increase search engine visibility. The screen below can be found at Settings > Options > Email > Signature Links.

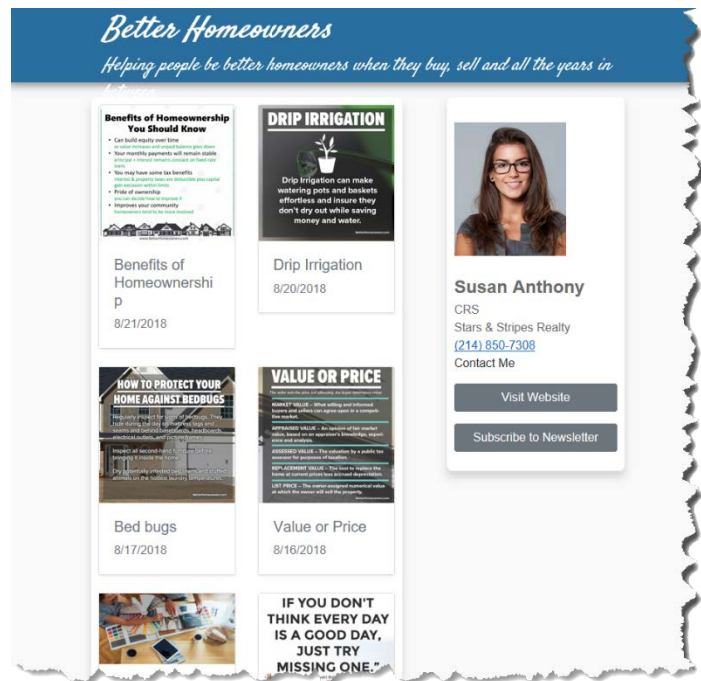
Another alternative would be to take the link from the Profile, Options, and Financing Calculators. Paste it to a menu item created on your website. This will launch a page of selected financial apps that consumers can work with.



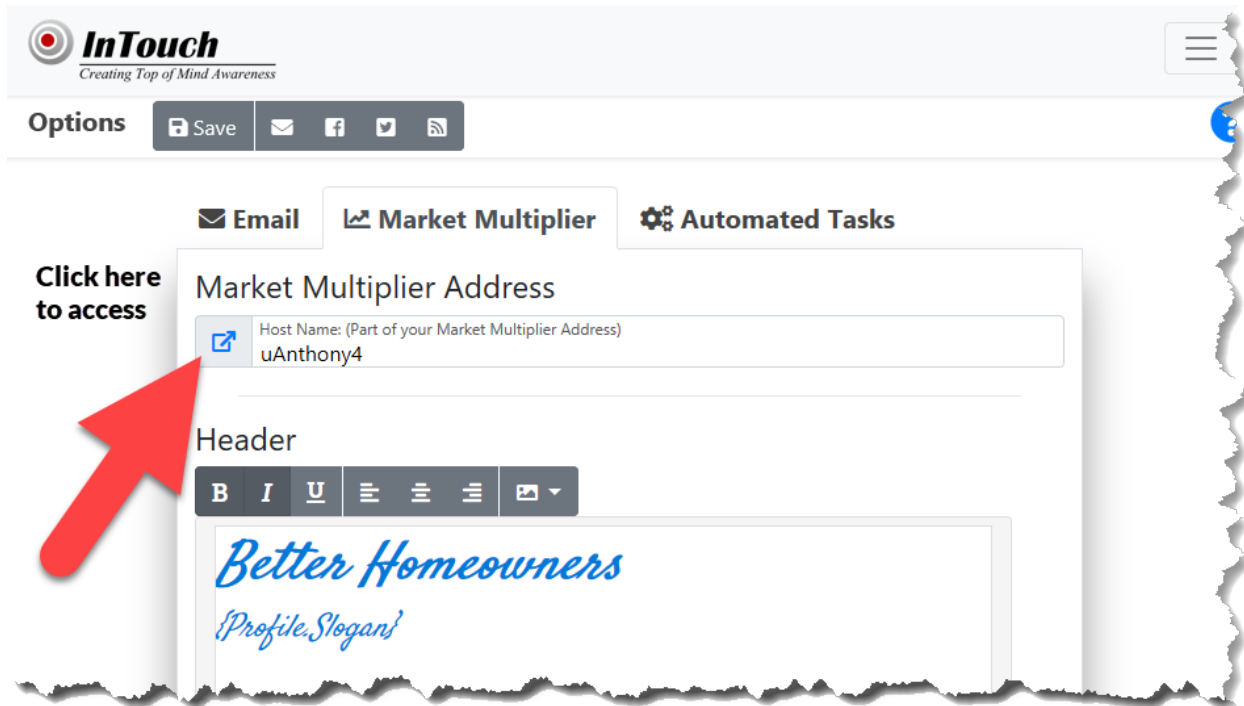
Market Multiplier

The Market Multiplier is a powerful marketing tool that aggregates the posts and articles produced for you by **InTouch**. It is located on a stand-alone webpage that is branded with your contact info, picture, link to your website and a way for new contacts to register for your newsletter.

There will be professionally generated reports branded with your contact info available to be downloaded from this page and every individual Market Multiplier post.



To view your Market Multiplier, select the Menu > Settings > Options > Market Multiplier tab. When it opens in your Internet browser, click in the URL and copy the address that is generated. That can be used to link it to a page on your website.



The name and slogan can be changed in this same screen in the text area called Header. **After making changes, select the Save button.**



Congratulations! You have **InTouch** set and ready to go.

- Each week, on Monday, you'll receive an email with that week's article. Please read it because your customers may ask you something about it. If you want to change anything in the article, you can do it from a link in that email. When your article goes out, it will have the changes you have made.
- If birthdays, holidays or reminders are scheduled to be sent that week, you'll also get an email from us letting you know. You can delete any mailing that you don't want to go out by following the instructions in that email.
- You can apply contacts to drip campaigns which were not addressed in this orientation but there are videos to help you use them.
- You can add more names to **InTouch** whenever you like. If you decide to just import a new CSV file from your database, **InTouch** will handle the duplicates and make it very easy for you.

We are continuing to add new features to make **InTouch** even better than it is now. If you need help, please contact our support department. If you want to make suggestions, send them directly to Pat@PatZaby.com.

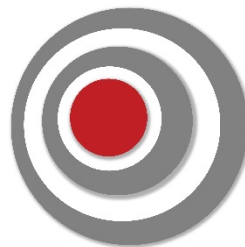
Thank you.

***InTouch* Support and Training**

972-743-9887 | Support@PatZaby.com

8:30 am – 5:00 pm Central Time Zone

Monday through Friday



InTouch