

## Getting Started Guide (Version 1.4)

This is a printable guide to get you up and running using some of the most important features of your new iMaxWebSolutions web site. For comprehensive instructions on using additional features of your web site, be sure to use our online help section by logging in to your web site and clicking the “Help” button at the top of your screen. You may also email your questions to [help@imaxwebsolutions.com](mailto:help@imaxwebsolutions.com) or call 978-927-9102.

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# Property Search

## **Search for property**

*To run a property search using basic criteria:*

- 1 Login.
- 2 Click the “Property Search” button or link.
- 3 Select a property type.
- 4 Search by one MLS # or many MLS #'s or do the following:
- 5 Define your price range.
- 6 Select a property status.
- 7 Select your search towns.
- 8 You can also search by zip code if you prefer.
- 9 You may search for property on a particular street.
- 10 You can change the number of properties displayed on each search results page.
- 11 Run the search: Click the “Search” button at the bottom of the page.
- 12 On the search results page, click each column heading to change the sort criteria.
- 13 To view a property’s Listing Sheet, click the property’s photo.

*To run a property search using advanced criteria:*

- 1 Login.
- 2 Click the “Property Search” button or link.
- 3 Follow steps 3 and 5-9 for running a basic property search as outlined above.
- 4 Click the “More Search Options” link.
- 5 This area contains optional additional criteria you may use to hone your search.
- 6 Available advanced search criteria include age, lot size, living area, # of rooms, # of bedrooms, # of baths (full and half), status date, and specific styles of a property type.
- 7 Run the search: Click the “Search” button at the bottom of the page.
- 8 On the results page, click each column heading to change the sort criteria.
- 9 To view a property’s Listing Sheet, click the property’s photo.

## **Create a saved search and receive daily email updates**

*In order to receive email updates, you must have at least one saved search.* Let’s walk through the steps you need to take to set up a saved search and receive daily email updates.

1. Login.
2. Click “Property Search.”
3. Select basic or advanced criteria for the search.

4. Check the box next to “Save this search?”
5. Next to “Save as,” enter a name for your search.
6. Choose to receive daily emails: check the box next to “Daily Email Updates.”
7. If interested, also check the box for “Instant Email Alerts.” Any time a property matching your search comes on the market or has a status or price change, you will receive an instant email notification.
8. Click the “Save Search” button.

You also need to do the following:

1. Click “My Preferences.”
2. Click “Email Options” (located in the row of links directly below the heading “My Preferences.” (you may also scroll to the “Daily Email Options” section.)
3. Check “Send Daily Property Updates” if it is not checked already.
4. Check “Send Updates in many small parts instead of one big message.”
5. Click the “Save All Changes” button.

## **Modify Search Towns**

There are several separate, custom lists of search towns for different types of users. To modify search towns:

1. Login.
2. Click the “My Preferences” button at the top of the screen.
3. Click the “Edit Towns” link located directly below the “My Preferences” heading.
4. On the “Town Lists” page, you may edit four lists of search towns.
5. To edit the list of search towns for your own personal property searches, choose “My Search Towns.”
6. To edit the search town list for members of your site, choose “Member Search Towns.”
7. To edit the search town list for public visitors of your site, choose “IDX Public Search Towns.”

8. After selecting one of the town lists to edit, you will see several columns labeled “Step 1,” “Step 2,” “Step 3,” etc ... (to see this on the Public Search Town screen, you will need to scroll down) To add a town, you need to make your selections in a specific order, going from left to right. First, choose a state in the left hand column.
9. Once you choose a state, a list of counties will fill in the next column. By default, “All Counties” is selected. If you want to see the towns for only one county, select that county.
10. The towns will display in the column labeled “Step 3.” Select the town you wish to add to your search town list. You may select multiple towns by holding down the control key (Windows) or the command key (Mac). You have the option to select entire counties at the top of the towns column.
11. Once you have selected the town or towns you want to add to your list, click the “Add” button. The towns are added to the bottom of the column on the right, which shows the towns that are currently on your search town list.
12. Make sure you click the “Save Changes” button or you will lose your changes.
13. To remove towns from your list, choose the town(s) in the right hand column and click the “remove” button, then “Save Changes.”

## **CMAs**

### **Create a CMA**

1. Login to your web site.
2. Click the CMA button at the top of your screen.
3. On CMA screen, click "New CMA."
4. Choose the property type for your CMA. The property type should correspond to your subject property.
5. You are now on the "Step 1: Fill in the Blanks" screen. Enter a unique "CMA Name." Select the appropriate property type. Enter the subject property's address.
6. Fill in the MLS # if property is in the MLS. This will automatically pull in all the MLS information for the property.
7. If you have personalized your CMA settings, the "Prepared By" field will automatically fill in. To personalize your CMAs, click the "CMA" button, click

"Personalize," and fill out the required data.

8. Press the button that reads, "Continue to Step 2."

9. "Step 2: Edit Subject Property": fill in all the specific data fields regarding the subject property. If the MLS# was filled in during step 1, the property information has been automatically filled in. You can edit the information.

10. Select the "Continue to Step 3" button at either the top or bottom of the screen.

11. On the next screen, entitled "Follow These Instructions," choose "Click Here to Run a Property Search."

12. On the property search page, create a search that will find comparable properties to your subject property. Run the search.

13. On the search results page(s), mark each property you want to add to your CMA by checking the box to the left of the photo.

14. Near the top of the screen, you will see, "You have (#) selected properties." Below that is a drop down menu which says, "Actions for selected properties." Click into the drop down menu and choose "Add Properties to Existing CMA."

15. A list of the selected properties is displayed. At the top of the screen, click into the drop down menu and choose the CMA you want to add the properties to. Click the "Add" button.

16. On the CMA Editor screen, you will see a message telling you that the properties have been successfully added.

17. To add Market Reports to your CMA, click the CMA button and click "Market Reports" button. You can now select from various market reports. From this Reports page, you can also brand these reports by clicking the "Edit Header & Footer" button and filling out the form.

18. To add the CMA Presentation Charts entitled, "Principles Of Proper Pricing," click the CMA button and click "Download Principles Of Proper Pricing PDF."

### **How to package a winning CMA**

A winning CMA package should include the following items:

#### **1. A Neighborhood CMA:**

A. Create a CMA showing all Neighborhood Actives, Under Agreements and Solds for the past year.

B. Use the same property type as the subject property.

**2. The Subject Property CMA, include the following:**

A. Title Page, from the CMA report.

B. CMA Presentation Charts, The Principles Of Property Pricing: download these from the CMA home page.

C. Sales Trend report for all towns in County: from the Reports page.

D. Town Sales Summary report for the subject town: from the Reports page.

E. Town Actives Summary report for the subject town: from the Reports page.

F. Absorption Rates report for the subject town: from the Reports page.

G. Agent Sales Activity report for you own production (if your production results help you): from Reports page.

H. Assessor's information about subject property: from assessor's office.

I. CMA comparable properties: from CMA report.

J. CMA summary: from CMA report.

## **Creating and Editing Web Pages**

(NOTE: If you selected one of our HTML design choices, you will not be able to edit your existing web pages unless you know how to read and write HTML. Contact iMaxWebSolutions to make updates to these pages. You may create new pages which will have a similar header and sidebar to your other pages.)

1. Login to your website.
2. Click the “Website” button at the top of the screen.
3. To edit your homepage, click “Home Page.” To edit one of your other pages, click “Web Pages,” find the page you want to modify, and select “Edit.”
4. To create a new page, click “Create New Page.” On the subsequent screen, enter a name for your new page and click the “Create” button.
5. Once you are editing a page, you will see there are a number of drop down menus which say “Select New Section to Display” and have an “Add” button next to them. These drop down menus are the key to adding new content to your

webpages. The drop down menus are located in spots where you can place new content.

6. To add new content to your page, find the drop down menu that's located in a spot where you want to add new content. When you click into the drop down menu, you will see a list of choices – these are the different types of content you can add. Among them are text, various types of links, MLS photos, images from your website's image library, and line breaks (equivalent to pressing the return key on a keyboard).
7. As an example, to add text to your page, click into the drop down menu and select "Text" from the "Text Tools" category and click the "Add" button.
8. The "Custom Section Editor" screen displays. Enter "This is a Test Headline" in the "Paragraph Title" text box. Check the box for "Bold Header Text." Leave the color for the header text at "Default." Click the "Choose Font Type" drop down menu and select "Verdana." Click the "Choose Font Size" drop down menu and select "Size 3." Click the "Save Changes" button and scroll to the bottom of the screen to view the results.
9. Clicking the "Return" button takes you back to the "Custom Page Editor" page. You will see that the section you just created now displays. You would click into the "Select New Section to Display" drop down menu below the section you just created to add the next area of the page.

## **Adding an MLS photo linked to a listing sheet to your homepage**

(NOTE: If you selected one of the HTML design choices, you will not be able to use this feature on your homepage)

1. Login to your web site and click the "Web Site" button at the top of the screen.
2. On the "Web Site Manager" page, click the "Home Page" link.
3. Each section displayed on your web site is visible and can be edited by clicking the "Edit" button for that section. There are menus between each existing section that allow you to place a new section of content in that location. (menus consist of drop down style options followed by an "Add" button.)
4. Find the location on the home page where you would like to place the listing. (select the drop down menu at the desired location)
5. Select "MLS Photo" (under PHOTOS / IMAGES). Click the "Add" button.
6. Under "Listing Num," select the MLS from the drop down list and then enter the MLS number for the property.

7. Under "Image Type," select the appropriate radio button, for either regular "Photo" or "Thumbnail." (small photo)

8. Click the "Add" button.

9. To scale the image, click the drop down menu to the right of the "Photo" and select the desired percentage.

10. In the "Link this Image to" section, make sure "Property Listing Sheet" is selected.

11. If desired, enter some "alternate text" which is a description of the image. Alternate text displays if the image does not. Alternate text is useful for users with disabilities and important for search engines. Search engines will index this information. The alternate text should include the property type, address, city, state and zip.

12. In the drop down menu for "Choose Line Break Type," the default setting is "Image Break." (If you want to have extra space around your image, choose "2 Line Breaks.") Choose an alignment of "Center," "Left," or "Right". The default setting is center alignment.

13. Click the "Save Changes" button.

14. Scroll down the page to "Your Current Section Looks Like This" to preview your work.

15. When done, click the "Return" button.

## **Moving Your Clients Over to Your New Website**

If you have existing clients / members with your old web site or with your MLS account and would like to move them into your iMaxWebSolutions account, we offer to move the first 100 members for you free of charge.

To take advantage of this offer, this is what you will need to do.

1. Log in to your existing web site or MLS account and print out the profiles of each member you would like to set up in your iMax account. Make sure the profiles include the client's name, contact information (including email address), and property search criteria.
2. Send the print outs of the profiles to: RE/MAX Advantage Real Estate, Attn: Terry Sullivan, 100 Cummings Center – Suite 104F, Beverly, MA 01915

## **Register Additional Domains**

1. Login.
2. Click the “Website” button at the top of the screen.
3. Click “My Domains.” (located in the left column)
4. This page displays the domains currently associated with your iMaxWebSolutions account. Click the “Add / Transfer a Domain” button.
5. Enter the name of the domain you are interested in registering. (you do not need to enter “http://www”) Click the “Search” button.
6. Our system will then run a search to see if the domain name is available. If the domain name is taken, the WHOIS record for that domain is displayed.
7. Otherwise, the next screen, "Add a Domain: Step 2: Register Your New Domain," will inform you that the domain is available. Press the "Register" button.
8. On "Step 3: Confirm Registration," you will see three fields listed. In the "Domain" field, check to make sure the domain name you entered is the one you want to register. Make sure there are no typos as well. The other 2 fields "Site Name" and "Site Email Address" should contain the default information for your website account. If everything looks OK, press the "Confirm" button. Otherwise, click "Return" to make corrections.
9. You will receive an email notification when your domain registration has been successfully completed.

## Using Existing Domains with iMax

To use an existing domain you own with your iMax website, you can either transfer the domain to your iMax account or keep the domain with your current registrar and point the Domain Name Servers (DNS) for the domain to iMax. Here’s how to point the DNS:

1. When you registered your domain, there should have been an account set up for you to manage that domain (with the company you registered it with - this company is known as your “registrar”).

You need to be able to login to your account with your registrar, so you’ll need your login and password. Contact your registrar if you do not believe you have a login or are unsure what it is.

2. If you are not sure who your registrar is:

Go to [www.nsi.com/whois/index.jhtml](http://www.nsi.com/whois/index.jhtml). Fill in your domain name (i.e. callkenny.com) and click “Search”. If your domain name is registered with NSI (Network Solutions),

your full account information will be displayed. Otherwise, look for the "registrar" information field and your registrar should be listed.

3. Once you know your registrar and login information, do one of two things:

- A. Go to the registrar's website and login to your account. Then edit the domain name servers and change them so that they are NS1.IMAXSALES.NET and NS2.IMAXSALES.NET. Make sure you save the change.
- B. Have iMaxWebSolutions handle it for you. Email your account login and password as well as the name and web site of your registrar, along with your instructions to point the DNS servers to iMax to: [help@imaxwebsolutions.com](mailto:help@imaxwebsolutions.com). We will then login to your account and handle it for you.

4. Now that you have changed the DNS, add the domain to your iMax account:

- A. Login to your website and click the "Website" button located at the top of the screen.
- B. Click "My Domains."
- C. On the "Domain Manager" screen, select the "Add / Transfer a Domain" button.
- D. On the next screen, "Add a Domain Step 1: Find a Domain," enter the domain name for the address of the domain (ex. 123GreenStreet.com) and click the "Search" button.
- E. iMaxWebSolutions runs a search to see if the domain name is available. In this case, your domain belongs to you and should not be available. You will see a message that the domain is already registered. Click the "transfer" button.
- F. Choose the second option, "Keep my current domain registrar and add to my domains." Click the "confirm" button.
- G. Go back to the Domain Manager screen and look at the entry for the new domain you just added. If you see a link that says, "Enable," click on it.

## **Change your login, contact information, or billing info**

1. Login.
2. Click the "My Preferences" button at the top of your screen.
3. Your contact information is displayed near the top of the screen. Simply edit any field you wish to change and click the "Save Changes" button.

4. Some users may initially receive a temporary password. iMaxWebSolutions strongly recommends that users with temporary passwords create new passwords. Users should also consider changing their passwords every 3-6 months. Scroll down to the “Login information” section of “My Preferences.” It is the next section below “Contact Information.”
5. To change the password, enter the same new password in “Password” and “Confirm Password.” Click the “Save All Changes” button. The iMaxWebSolutions help system provides tips on choosing a good password: [http://www.imaxwebsolutions.com/help/manual/tips\\_passwords.php](http://www.imaxwebsolutions.com/help/manual/tips_passwords.php)
6. You may also change the email address used to login to your account. Enter the new email address in “Email Address” and “Confirm Email Address,” then click “Save All Changes.”
7. To verify or adjust your “Billing Information,” scroll down: it displays directly below “Login Information.” Please verify that your billing information is correct. Edit any fields you wish to change and click the “Save All Changes” button.