



**Training Guide
for
Promatch **Complete****

Johnson County Board of REALTORS®

Support personnel are available from 8:00am to 6:00 pm EST Monday through Friday.

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Table of Contents

Quick Help Guide

Let's Begin!	Page 1	Custom Reports	Page 34
Tablet and Phone Shortcuts	Page 2	Message Board	Page 35
Password Management	Page 3	Use Your Tablet	Page 36
Preference Management	Page 4	pmc mobile Promatch Select Homes	Page 37
Board Comments	Page 5	Promatch Connected Websites	Page 38
Smartspace	Page 6	HELP!	Page 39
Add, Edit or Copy Listings	Page 11		
Adding/Editing Listing Information	Page 12		
Advanced Spell Check	Page 13		
Adding/Maintaining Photos	Page 14		
Adding Documents	Page 16		
Edit Your Agent Information	Page 17		
Office Information	Page 18		
Contacts	Page 18		
Create Searches	Page 19		
Browse Pods	Page 21		
Reports	Page 23		
Photo Viewer	Page 24		
Multi-tasking	Page 24		
Listing Report	Page 25		
Auto Prospecting	Page 26		
Reports View	Page 30		
CMA	Page 32		

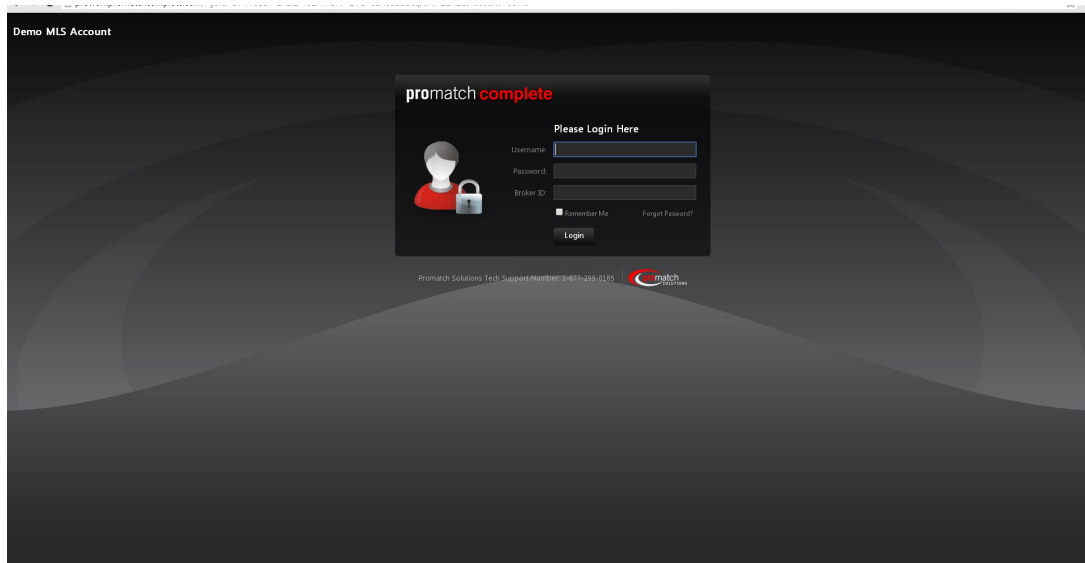
Let's Begin!

Quick Help Guide

inar.promatchcomplete.com

Type this address into your pc or tablet web browser . **(NO www at the beginning!)**

- Key in your User Name and Password
- *User Name and Password are Case sensitive and must be typed exactly as they were given to you.*
- Broker ID is ONLY required if you are a member of multiple offices.
- Click on “Login” button.



Recommended: Create a Desktop Shortcut

BEFORE CLICKING THE “LOG IN” BUTTON



- Right Click in open space on the Log-in screen.
- About halfway down the dialogue box, click on “Create Shortcut”
- When asked if you want to place a Shortcut on your desktop click “Yes.”
- The shortcut icon will be placed on your desktop
- You may change the name of the shortcut to any name you would like.

NOTES:



Tablet and Phone Shortcuts

Quick Help Guide

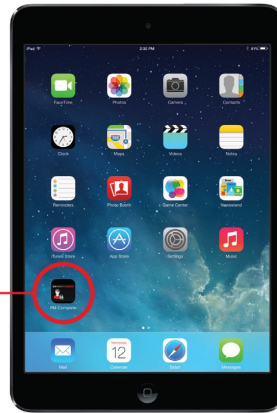


1. Use the built in browser "Safari" to navigate to your boards **promatch complete** web address.
(Ex. <http://ABCD.promatchcomplete.com> with ABCD replaced by your boards four letter designation.)
2. Tap the "Action" or "Share" button that appears like a box with an arrow at top. 
3. Tap the "Add to Home Screen" button. 



1. Use the built in browser "IE" to navigate to your boards **promatch complete** web address.
(Ex. <http://ABCD.promatchcomplete.com> with ABCD replaced by your boards four letter designation.)
2. Tap the "Star" button 
3. Tap the "Pin" button 

What is a web clip?



A website icon that is stored on your devices "home screen."



1. Use the built in browser to navigate to your boards **promatch complete** web address.
(Ex. <http://ABCD.promatchcomplete.com> with ABCD replaced by your boards four letter designation.)
2. Tap the "Menu" button.

Menu Button Examples



3. Select "Bookmarks"
4. Select the thumbnail that says "Add"
5. Change name to "pm complete"
6. Tap and hold the newly created bookmark, when the menu pops up, select "Add shortcut to Home"

NOTES:

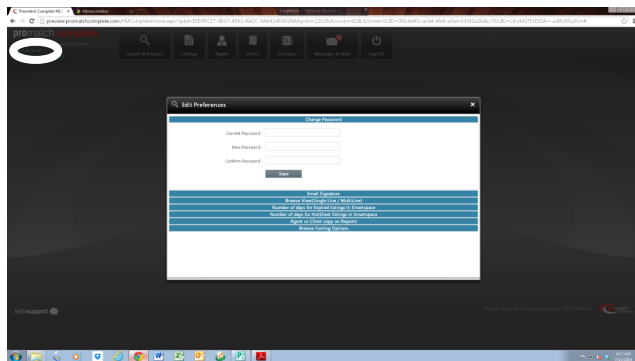
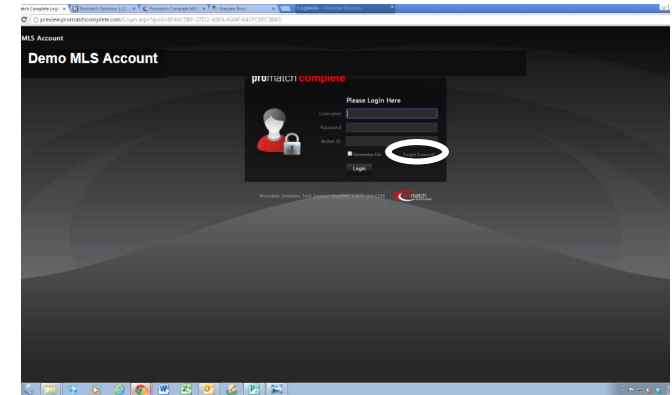
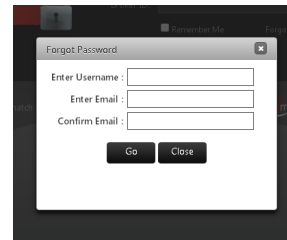
Password Management

Quick Help Guide

Forgot Password?

Recovering your password in **Promatch Complete** is easy and straight forward. You will need both your User Name and the email address you use with **Promatch Complete**.

1. Click the Forgot Password link (found beneath the log in information)
2. Fill in your User Name and email address
 - CAUTION: Your email address must match the email address you have in the **Promatch Complete** database.
3. An email with your password will be sent to the valid email address you have entered.



Change Your Password

AFTER logging into **Promatch Complete**, you can change your password any time you would like:

- Click on Edit Preference under the Welcome message.
- Key in your old password and your new desired password
- Confirm the new password
- An email with your new password will be sent to the email address in your Agent Profile.

NOTES: _____


Preference Management

Quick Help Guide

Setting Preferences

In **Promatch Complete** you control the default settings for many of your screens. Located in the upper left hand corner, directly under the **Promatch Complete** logo, you will find Edit Preferences. Click on Edit Preferences and you will have the following choices:



- **Change Password** - Create a new password 
- **Email Signature** - Click on “ON”, then create and signature to be used on your emails. This signature will be used for all emails sent from the **Promatch Complete** system.
- **Browse View (Single Line/Multiline)** - Click on “ON”, then select Single Line or Multiline. This Preference controls how Browse View in your Search screen will first appear. (You can always change the view within the Search screens by clicking on the single line or double line in the upper right hand corner of the Browse View screen.) Don't forget to Save!
- **Number of days for Expired listings in Smartspace** - Click on “ON” and key in the number of days prior to the expiration date you would like to view your listings. Don't forget to Save!
- **Number of days for HotSheet listings in Smartspace** - Click on “ON” and key in the number of days you would like to show on your real time HotSheet. Don't forget to Save!
- **Agent or Client copy on Reports** - Click on “ON”, then select Agent Copy, Client Copy or Photo Report to determine the default view for your Listing Reports. Don't forget to Save!
- **Browse Sorting Options** - Click on “ON”, then select MLS Number or List Price, then Ascending or Descending to determine how your Browse View displays Listings found in Search. Don't forget to Save!

Change Password
Email Signature
Browse View(Single Line / MultiLine)
Number of days for Expired listings in Smartspace
Number of days for HotSheet listings in Smartspace
Agent or Client copy on Reports
Browse Sorting Options

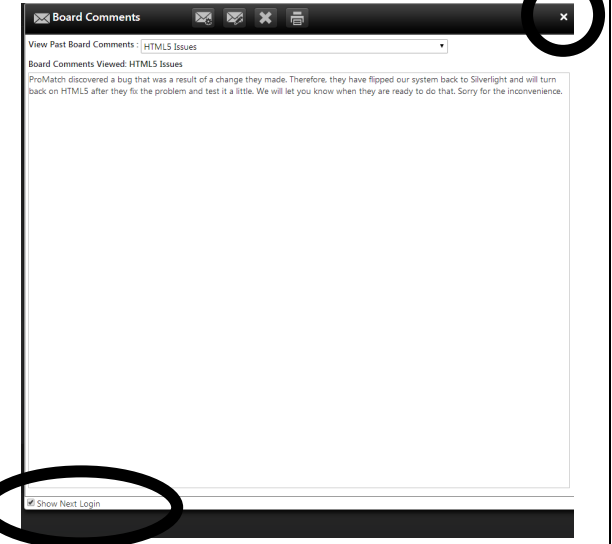
NOTES: _____

Board Comments

Quick Help Guide

Board Comments provides your MLS staff an easy way to communicate with all of the members of your Board. Board comments will automatically appear following login and must be read and closed in order for you to use the system. To close Board comments after reviewing its contents: Click on the white “X”

If you have read the messages and do not want to see the Board Comments again until there is new information, uncheck “Show Next Login” and the Board Comments will not automatically appear again until there is a change to it.



TIP: Recall Board Comments at any time to review the messages by clicking on the “Messages and Help” tab and select “Board Comments”.

NOTES: _____

Smartspace

Smartspace provides access to a vast amount of system and personal data. Each section is opened or closed by clicking on the arrow on the right-hand side.

HotSheet

When you first access **Promatch Complete**, the real time HotSheet will be open. This HotSheet reflects all activity as it occurs beginning at 12 midnight of the prior day. All statuses will be orange and remain orange until you “click” on them to review. Clicking on a cell will instantly access the Listings the HotSheet references. Once opened the status will turn to white. New activity in a status will turn the appropriate cell orange again until the status is reviewed.

Click here to see Listings.

The screenshot shows the SmartSpace interface. On the right is a sidebar menu with the following items: Listing By MLS (expanded), Listings By Address, Expiring Listings, and HotSheet Listings. The main content area displays a table with two sections: Commercial and LotsAndLand. The Commercial section has the following rows: Expired (2), Extended (3), New (2), Pending (1), Price Change (4), Tmp Off Mkt (1), and Withdrawn (1). The LotsAndLand section has the following rows: Backups Wanted (1), Expired (2), Extended (1), New (3), Pending (7), Price Change (2), and Sold (1).

Listings By MLS

For quick access to any MLS number open the Listings by MLS section by clicking on the down arrow. Enter the MLS numbers you desire to see clicking “**Add**” or hitting your “Enter” key after each one. When all your numbers are entered click “**Browse**” and see the full Listing data for each number you’ve entered. If you have several MLS numbers to enter, entering the numbers in succession separated by a comma then clicking “**Add**” or hitting your “Enter” key will also work.

The screenshot shows the Listing By MLS form. It has a title bar with a down arrow and the text 'Listing By MLS'. Below the title bar is a text input field labeled 'Enter an MLS #'. To the right of the input field are four buttons: Add, Delete, Clear, and Browse.

NOTES:

Smartspace continued

Listings By Address

The screenshot shows a web interface for searching listings by address. At the top, there's a dropdown arrow and the text 'Listings By Address'. Below that is a text input field labeled 'Enter Part of address or Street#' containing the word 'cherry'. There are three dropdown menus: 'Select PropType(s)' with 'ResidentialProperty' selected, 'Select Status(s)' with 'Active' selected, and a summary bar showing '12 Matches'. At the bottom are two buttons: 'Search' and 'Browse'.

For quick access to any Listings based on an address search open the Listings by Address section by clicking on the down arrow. Select the Property Type and Status. Enter any portion of the address you desire then click “**Search**” to see the number of matches. For example: to find 126 Old Vine Road, key in “Vine” or “Vin”. This will provide the highest number of matches. You may modify the address to change the number of matches. Finally click “**Browse**” to see the Listing data for all matches. Skim the Listings to find the exact address you were seeking.

Tip: Key in only a **PORTION** of the address to optimize search selection.

Expiring Listings

Opening this section will show all of YOUR Listings set to Expire in the next 7 days. Expiring Listings is driven by your User Name and password, therefore you will only see those Listings assigned to you unless you have higher level access authority.

Online Forms

In this section you may access all of your Board’s Input Forms and other pertinent paperwork. Never use outdated forms again! The Board will keep these up-to-date for you to print as you need them.

NOTES:

Smartspace continued

Links

Connect to the world outside of **Promatch Complete**. Links provides quick access to tools designed to help you do your job.

1004 MC

The 1004 MC links provide information and a spreadsheet to perform calculations for the Federal 1004 MC Appraisal form required by many banks. With this easy to use form, appraisers have the ability to quickly analyze the Board's database and complete the 1004 MC form.

- Spreadsheet—This is an Excel spreadsheet prepared by Don Machholtz of Don's Appraisals. You will populate this spreadsheet with data found during your search process. Data is exported to the spreadsheet via the 1004 MC export.
- Instruction Sheet—The Instruction Sheet provides detailed instructions on how to gather data within **Promatch Complete**, how to export that data to the Spreadsheet and how to use the Spreadsheet to complete the 1004 MC form.
- Don's Appraisals—This is a link which will take you to Don Machholtz's website. There you learn more about Don, the Spreadsheet and connect directly with Don Machholtz the creator of this Spreadsheet.

NOTES:

Smartspace continued

Links (continued)

Marketing Toolbox

The Marketing Toolbox provides marketing services to help you sell Listings faster. New services will be added on a regular basis.

- Promatch Select Homes—create a Listing unique website to market your Listing on the Internet. Design the website before you buy the service—a great Listing presentation tool. Websites cost as little as \$45.00 for up to one year of publication. If you need your website longer than a year, the extension cost is only \$25.00. Discount packages for multiple sites are available.
- Realtor Websites—Need a website for yourself or your office? Promatch can help! Choose from simple to complex website design options all priced below our competitors. Design and hosting will be supplied by Promatch. One solution, no headaches.

Help Links

- Training Guide—A digital copy of this Training Guide is available. This Training Guide can be referenced or printed out from this link.
- Support Chat—Have a question about how to perform a task in **Promatch Complete**? Support Chat gives you online chat capability with the technical support people at Promatch Solutions. If they are Offline, leave a message and someone will get back with you. This link provides the same capability as the Tech **Support** button at the top of the screen.

NOTES: _____

Smartspace continued

Links (continued)

Help Links (continued)

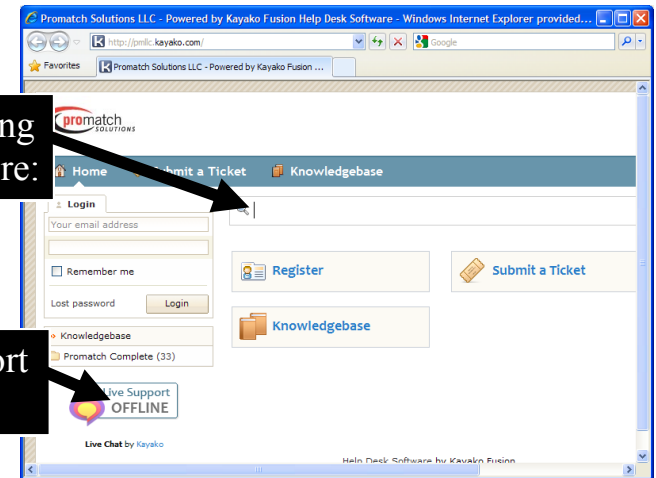
- Knowledgebase—Need a quick answer? Key your question into the **Promatch Complete** Knowledgebase and get an immediate response. If the Knowledgebase doesn't have an answer, click the Live Support button to chat with a technical support rep or leave a message if Live Support is unavailable.

Other Links

- Get Adobe Reader—Quick access to the latest version of the Adobe Reader. Adobe Reader is required for all **Promatch Complete** reports.
- Realtor.com—Quick access to this popular Real Estate Listing website.
- IDX—Access to the Board IDX site. This website may be framed by any Board member website to make Board listings available to the public free of charge.
- E-Loan—E-Loan is an independent website providing mortgage calculators, current mortgage rates and a host of financial tools for home buying and refinancing.

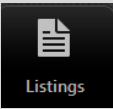
Begin keying question here:

Live Support (Chat)



NOTES: _____

Add, Edit or Copy Listings

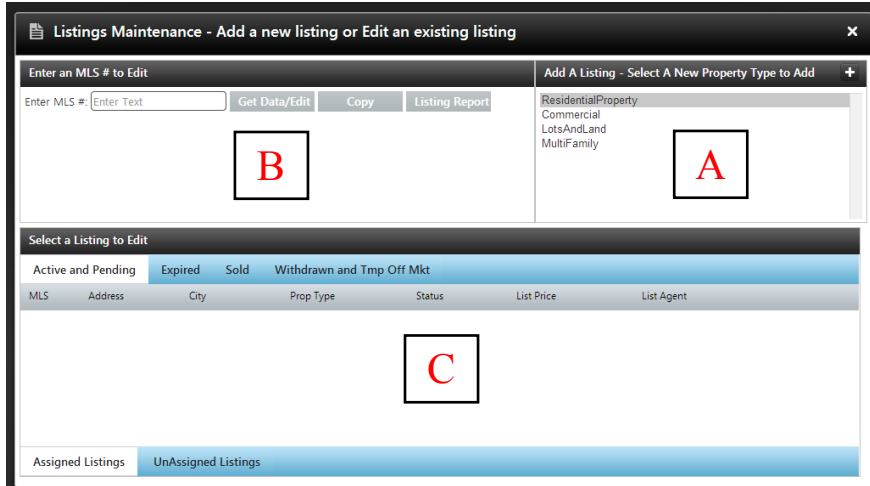


To Add, Edit or Copy a Listing, click on the **LISTINGS** menu item at the upper right corner of your screen.

To **Add** a new listing, click on the Property Type in section **A**, then click the “Add New Listing” button. The “Cancel” button will close the Listing screen.

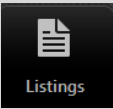
To **Edit** or **Copy** an existing listing, there are three options:

1. If you know the **MLS Number** you want to edit, use section **B** of the screen to enter that number. Then click the “Get data/Edit”, “Copy”, or “Listing Report” button.
2. To edit listings that have an MLS number Assigned to them OR Listings which have not yet been assigned an MLS Number refer to section C then:
 1. To edit listings which have an MLS number **Assigned**, select the Property Status tab at the top of section **C**, click on the listing then click the appropriate icon on the right.
 2. Click the **Unassigned Listings** tab at the bottom of Section **C** for listings with no MLS number assigned.

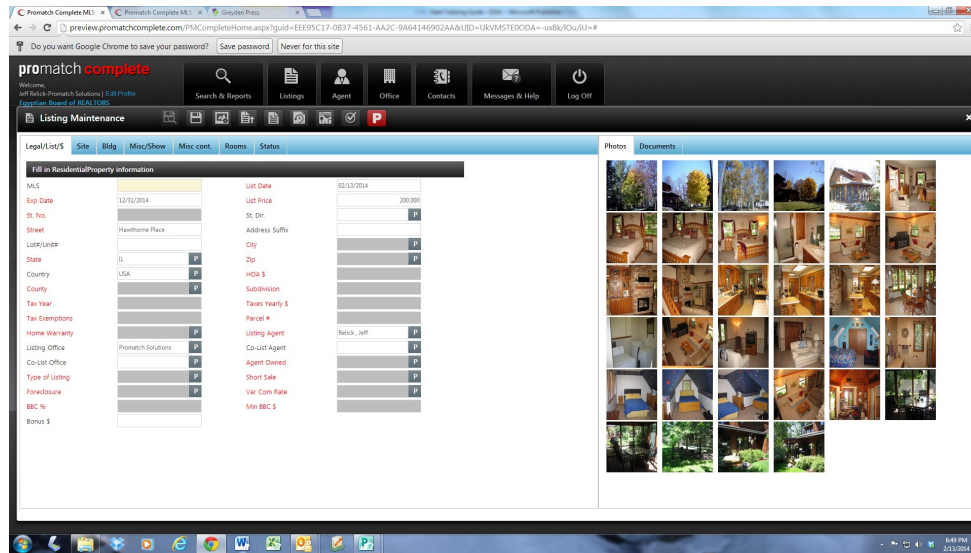


NOTES: _____

Adding/Editing Listing Information



The Listing Data Screen allows you to enter and edit all of the data pertinent to your listing. The data entered on this screen will be used to generate all system flyers, reports and Internet data feeds, so it is important that it is accurate and complete.



Hints for making data entry easier:

- Information is grouped under tabs with descriptive headings. Click on each tab to find the fields associated with that tab.
- Fields that are shaded ORANGE are required to be filled in to save a partial listing.
- All fields that have a RED label and are shaded GREY are **required** to be filled in before you can get a MLS number.
- Fields that have a “P” at the end of them are Single-Pick fields. Click the “P” P and a list of available choices will appear. You may only choose ONE item from the list of a Single-Pick field.

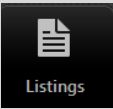
CAUTION!!
All date fields must be entered as:
m/d/yyyy

- Fields that have a “M” at the end of them are Multi-Pick fields. Click the “M” M and a list of available choices will appear. We recommend you click your choices in order of importance. To unselect a field, simply click it a second time.
- To fine tune your property location click on the Edit Map Location button. Google Maps will open. Move the pin to the correct location. Click Save and then Click Save Listing. To view the new location click on the Mapping Button.

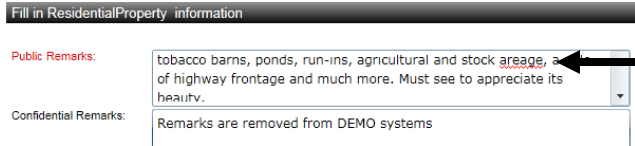
You must click “Save Assign MLS” to have a MLS number assigned. This button will only be available if all required fields have been filled in. If the button remains greyed out, review each tab looking for GREY shaded fields or use the validate listings button and it will tell you all the remaining required fields that need to be completed in order to be able to have a MLS number assigned.



Advanced Spell Check

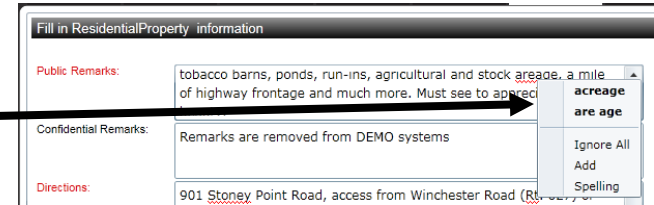


Promatch **Complete** is equipped with automated Advanced Spell Check in all text fields of the Listing Data Screens. Advanced Spell Check will automatically flag any combination of 2 or more letters (without spaces) that it cannot reconcile in the master dictionary. Advanced Spell Check is automatically activated for all Listings. It will check text fields for Listings as they are entered and will check text fields for existing Listings as they are opened in the Listing Data Screens for editing.

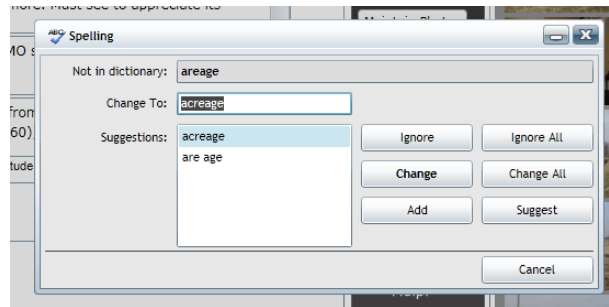


Automated Spell Check will flag misspelled words with a familiar red underline.

RIGHT clicking on the misspelled word presents respellings of the word or the choice to **Ignore All** uses of the word within that text box, **Add** that word to your personal dictionary, or check the **Spelling** of all misspelled words in the text box one at a time.

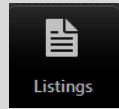


- **Add** a word places that word in the Promatch Dictionary on your computer. It will not be added to the dictionary accessed by all users, nor will it be added to the dictionary on any other computer you may use.
- **Spell** brings up a full spelling menu which will automatically move to the next misspelled word as the treatment of each misspelling is resolved.



NOTES:

Adding Photos



The Listing Data Screen allows you to enter and edit all of the data pertinent to your listing. The data entered on this screen will be used to generate all system flyers, reports and Internet data feeds, so it is important that it is accurate and complete.

Adding Photos:

1. Click the box to the right that says Click or Drop Photos here to Upload on the Listing Screen.
2. File upload will open
3. Find the folder in your computer with your photos and open the folder.
4. Click the first photo you wish to add—Hold the shift key down and click the last photo you wish to add.
5. Click “Open” button and photos will move to the Drop Photos Upload box or
6. Drag the photo from the folder in your computer to the Drop Photos here to Upload Box.

Tip: Promatch Complete will accept any size photo, however, **optimum photo size is 800 X 600.** This will provide a quality photo and optimize upload speed.


The photo in the upper left hand corner will be your lead or primary listing photo. This photo will appear on all listing sheets and websites!

NOTES: _____

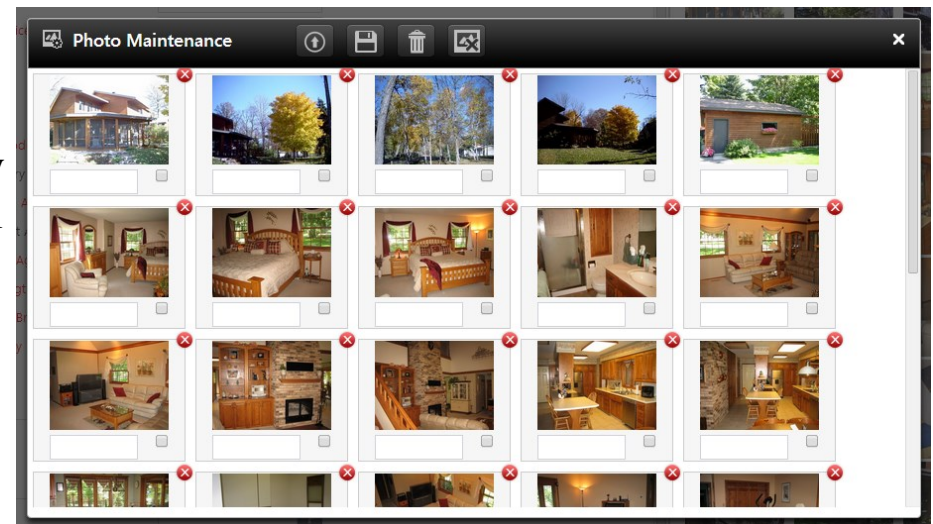
Maintaining Photos



The photo in the upper left hand corner will be your lead or primary listing photo. This photo will appear on all listing sheets and websites!

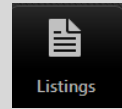
1. After photos are loaded, click “Maintain Photos” icon. 
2. **To Move a Photo:** Click on photo to be moved, drag it to its new location and release the mouse button.
3. **To Delete a photo:** There are two ways to delete photos; a) click on the “x” in the upper right hand corner of each photo or ✓ the box in the lower right hand corner of the photo(s) then click the trash can at the screen top.
4. **Remember to Save all photo changes before closing the screen!**
5. A space is provided at the bottom of each photo to label the photos if desired. These will not currently display, however, label displays will be available in the photo viewers in the near future.

Tip: Promatch complete will accept any size photo, however, optimum photo size is 800 X 600. This will provide a quality photo and optimize upload speed.




NOTES: _____

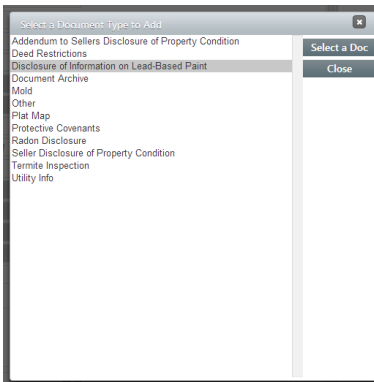
Adding Documents



The Listing Data Screen allows you to enter and edit all of the data pertinent to your listing. The data entered on this screen will be used to generate all system flyers, reports and Internet data feeds, so it is important that it is accurate and complete.

Adding Documents:

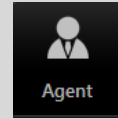
1. Scan your document(s) using your scanner.
2. Create a PDF file out of the scanned file. **One file for each document type. (Note: Remember where you have saved the files!)** If you do not have software that allows you to create PDF files, you can load your web browser and go to www.cutepdf.com and follow the instructions on the web page to download cutepdf pdf writer. This free software will allow you to generate PDF files that can be attached to your listings.
3. Click the “Documents” icon on the Listing Data Screen. 



4. Click on the document you would like to add, then click the “Select a Doc” button
5. Find the folder in your computer with your documents and open the folder.
6. Click the document you wish to add.
7. Click “Open” button then click “Upload” and the document will upload.
8. Documents will appear in the “Documents” tab next to the “Photos” tab and can be Previewed and Deleted there.

NOTES: _____

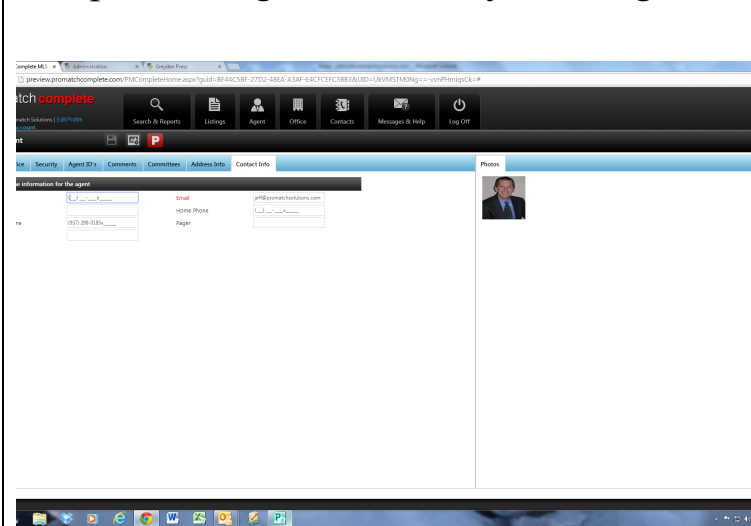
Edit Your Agent Information



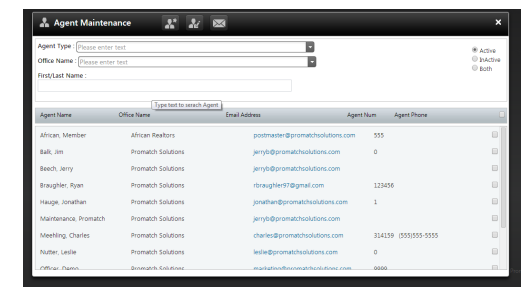
Promatch Complete comes pre-populated with your agent information. You have the ability to easily update contact information, address information and agent profile information as well as add a photo(s). This information will be used on all flyers and reports that are generated by **Promatch Complete**.

Here are the steps to review or change your Agent information:

1. Open the Agent Screen by clicking on the **AGENT** button at the top of your screen.



2. There are several ways to find agent names, by Agent Type, Office Name, Last Name (partial name may be used) or a combination of the three. Only one field needs to be filled out in order to get a list of agents.



Complete the appropriate field and **Promatch Complete** will present a list of agent names meeting that criteria.

3. To change YOUR information, highlight your name by clicking on it.

4. Select the “Edit Agent” icon at the top of the screen.

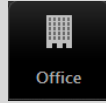
5. Your agent information will be displayed under the appropriate tab. Click each tab to see the information.

6. You can change any information under the “Contact Info” tab.

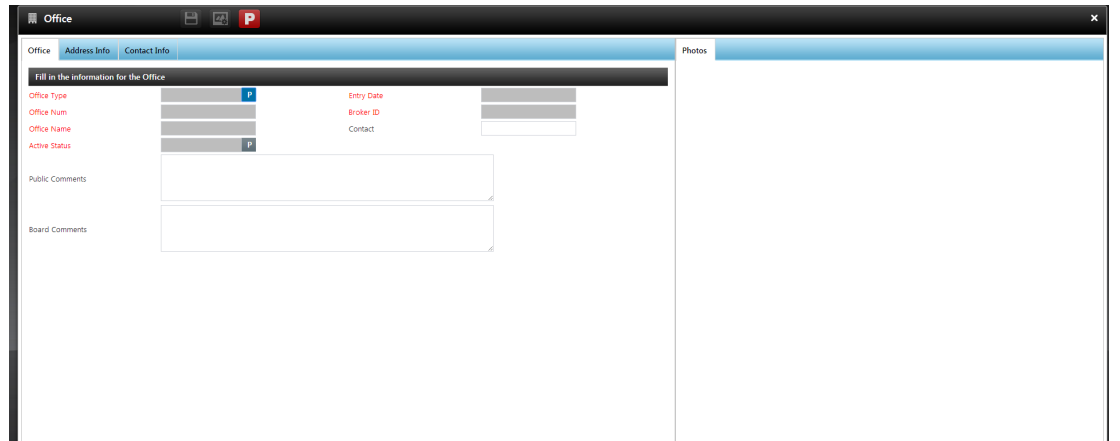
7. BE SURE TO CLICK THE “SAVE” BUTTON TO SAVE YOUR CHANGES!!

NOTES:

Office Information

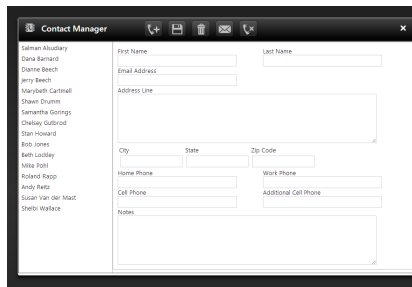
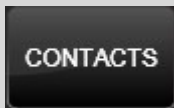


In **Promatch Complete** each Agent is assigned to an office. The office information resides on the Office Screen accessible by clicking on the **OFFICE** menu item. The office information can be updated only by the Designated Realtor or Broker. The office information linked to each agent will be used on all flyers and reports that are generated by **Promatch Complete**.



To edit Office Information, please see the Edit Your Agent Information page and follow those steps.

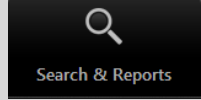
Contacts



By clicking on the **CONTACTS** menu item, you gain access to the **Promatch Complete** contact manager. The contact manager allows you to enter and manage pertinent information about your contacts. Simply click on the fields you desire to fill in and key in the information. **REMEMBER TO SAVE YOUR ENTRIES FOR EACH CONTACT!** Email addresses entered for a contact will be accessible in the portions of **Promatch Complete** which permit email of Listing information.

NOTES: _____

Create Searches



Searching and reporting data in **Promatch Complete** is one of the most powerful aspects of this system. Simple and straightforward, by clicking on the **SEARCH** menu item, numerous opportunities to explore the data in your system and generate reports exists.

The Property Matches counter at the center of the screen continually tracks the properties that meet the criteria you select.

To create a search, use the following steps:

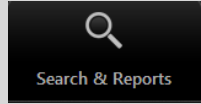
1. After opening the search screen, select the Property Type(s) and the Property Status(es) you wish to search.

There are two ways to select search criteria the Available Field list. (**RED** label fields denote that the field is a required field when entering a new listing and therefore ALL listings will have that field filled in.)

- 1) Select a search criteria from Available Field list by clicking it. Fields are in alphabetical order.
- 2) Utilize blank field beneath “Available Fields” title to begin spelling field name. Field scrolls to the top.
2. Based on the criteria selected, one of three criteria screens will display: a) numeric criteria; select an operand (=, <=, >=, Range) and enter numbers, b) pick or multi-pick criteria; click on the selections desired, and c) wild card criteria; enter keywords to search free form fields. Click the “Add Criteria” button.
3. Criteria is displayed in Selected Criteria field and Property Matches adjust with each saved criterion.

NOTES:

Create Searches Continued . . .

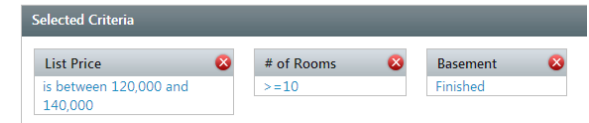


Modify Searches

There are two ways to modify Selected Search Criteria:

- To delete the criteria, click on the **RED circled “X”** in the corner of the criteria’s field.
- To modify or change the criteria, click on the criteria description and the Criteria Description Panel will open permitting you to modify or add to your criteria.

Property Matches: 6

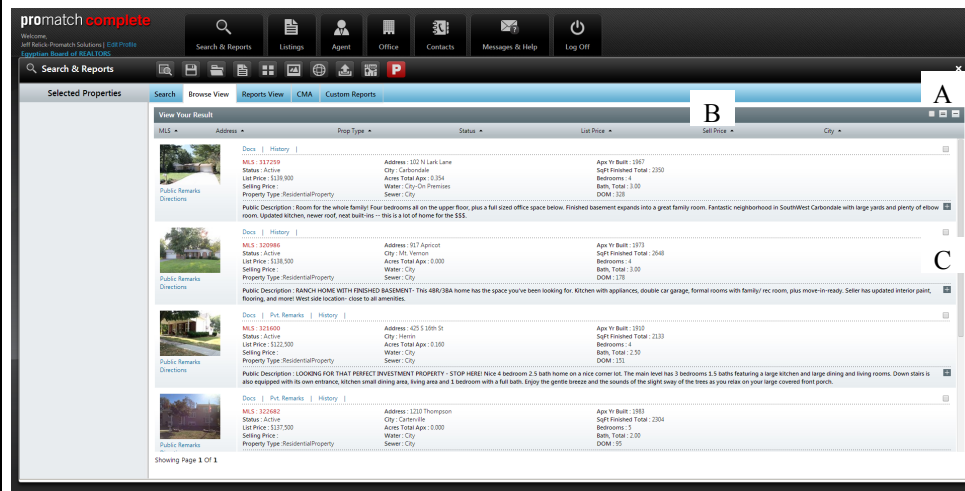


Browse View

At any point during your search you may click on the “Browse View” tab. The Browse View will display the Property Matches that have been found for your current search. If you need more or fewer properties, click on the “SEARCH” tab and add or modify search criteria, then return to the Browse View.

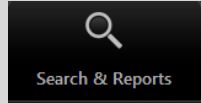
Hints for using Browse View:

- Click on the single or multiple lines in area **A** to change from a listing overview to a single line report or back to the overview.
- Click on any headings in area **B** to sort listings by that heading.
- To select a Listing for further analysis or reports, click on the “Select” box in area **C** of the Listing Description.
- To select all Listings, click the blank box in area **A**.



NOTES:

Browse Pods



Browse Pods are very powerful information tools used extensively in **Promatch Complete**. Browse Pods provide quick single click access to all of the information attached to a specific Listing.

Documents, Virtual Tours, Etc.

Listing History

If available, Private Remarks and Virtual Tours will also appear in this space.

Photo Viewer

Public Remarks

Directions

Listing Report

Public Remarks

Select Listing for Reports

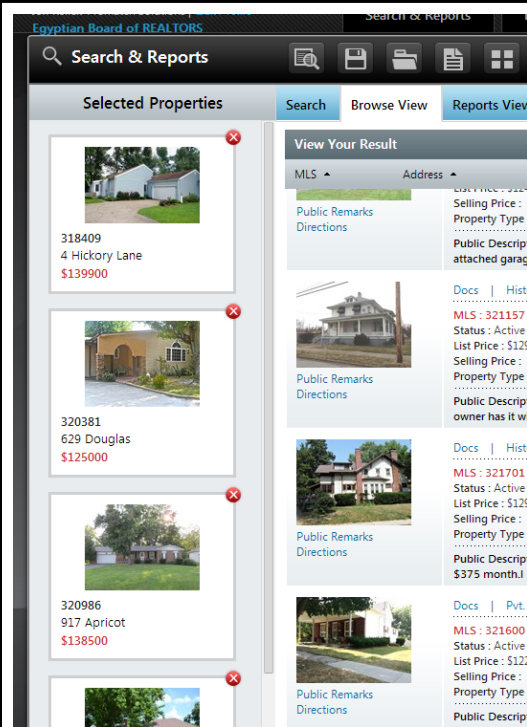
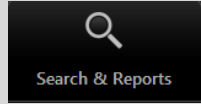
Listing Detail Report - Lists all elements entered for the Listing

Listing Detail +

The screenshot shows a real estate listing interface with two property cards. The top card is for a property at Walnut Drive, Pikeville, KY, with 3 bedrooms and 2.5 bathrooms. The bottom card is for a property at KY RT 580, Drastochure. Callout boxes point to various features: 'Documents, Virtual Tours, Etc.' points to the 'Docs' link; 'Listing History' points to the 'History' link; 'If available, Private Remarks and Virtual Tours will also appear in this space.' points to the 'Public Remarks' section; 'Photo Viewer' points to the photo gallery; 'Public Remarks' points to the 'Public Remarks' button; 'Directions' points to the 'Directions' button; 'Listing Report' points to the 'Listing Report' button; 'Public Remarks' points to the 'Public Remarks' button; 'Select Listing for Reports' points to a plus icon in the top right; 'Listing Detail Report - Lists all elements entered for the Listing' points to a plus icon in the bottom right; and 'Listing Detail +' points to a plus icon in the bottom right.

NOTES: _____

Create Searches Continued . . .



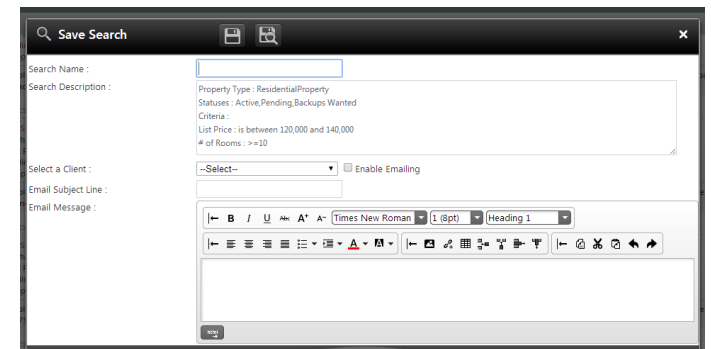
Selected Properties

As Listings are selected in the Browse View, a thumbnail picture of the property, its address and MLS number will be populated in the “Selected Properties” field on the left of the screen. These are the Listings that will be used for reports and CMAs. You may select as many properties as desired and scroll through them in this field.

To select properties from multiple searches with different criteria, perform Search 1. Go to the Browse View and select Listings in which you are interested. Then return to Search, modify your Search criteria or create a new search, Search 2. Go back to Browse View and select properties from this second search. The selected properties from Search 2 will be added to those selected from Search 1. (When using Custom Reports, Listings on the full Browse View Screen are used, not Listings in the Selected Properties pod.)

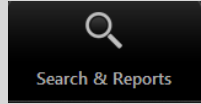
Save Searches

Any created Search criteria can be saved by clicking on the “Save Search” button. The Save Search screen will permit you to name the search, describe it, then choose between a Client Search and a Prospect Search. In the case of a Prospect Search you will be able to select the client email address and compose an email to accompany new listings found as well as turn on or off email capability.



NOTES: _____







Reports



Selected Properties Reports

To create Reports using the properties you've selected, click on the icon choices at the top of the screen.



- When **Listing Report**  is chosen you will be prompted with the PMComplete Report Options screen:
 - *Agent Copy*—Generates a Listing Report with data marked as Agent Viewable Only.
 - *Client Copy*—Generates a Listing Report without data marked as Agent Viewable Only.
 - *Agent and Client Copy*—Generates both copies.
- **4-Up Report**  generates a report with picture plus summary information for up to 4 listings per page.
- **Photo Report**  creates a report with 6 photos of each selected Listing, one Listing on each page.
- **Browse Report**  is a single line summary of the Selected properties showing MLS number, Property Type, Address, List Price, Sold Price (if any), Status, City, Listing Agent, Listing Office and Days on Market.
- **Export**  will allow you to move data to other software packages. The default selection will work with most Real Estate software packages.
- **Mapping**  will place the selected properties on a map where you can view a traditional street map, a satellite image map with or without street names and take a Neighborhood view of the area.

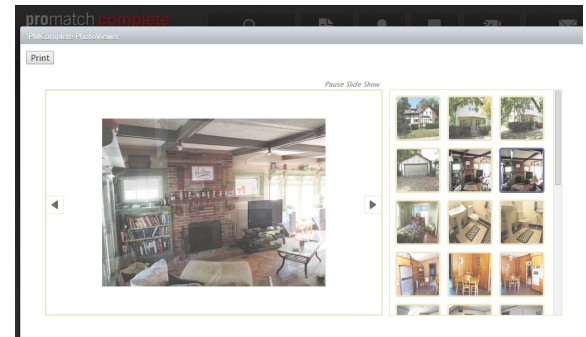


ALL REPORTS CAN BE EMAILED, PRINTED, OR SAVED TO YOUR COMPUTER.

NOTES: _____

Photo Viewer

The Photo Viewer is available from any screen that displays a photo. (Photo Viewer cannot be activated from a Report.) Simply click on any displayed photo and the photo viewer will open. The photo viewer shows all photos attached to that particular Listing. By moving your cursor over the photos along the bottom of the viewer, the large photo automatically changes to reflect the photo which your cursor is over.



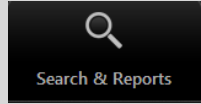
Multi-tasking

Promatch Complete permits multiple instances of the program to be open at once. Working on the Listing screens and need to perform a quick search? Simply open a new window in your browser, log into Promatch Complete and open the Search screen. Both windows can now be left open and worked on intermittently as convenient for you. Multi-tasking means work can be interrupted, new screens opened, then your original screen can be returned to at a later point for work completion. All without being forced to save.

To return a prior open screen simply click on the appropriate browser tab you wish to open. An unlimited number of sessions can be opened simultaneously from the same computer. However, **BE SURE TO SAVE YOUR PARKED SCREEN DATA BEFORE CLOSING YOUR BROWSER OR SHUTTING DOWN YOUR COMPUTER.**

NOTES: _____

Listing Report



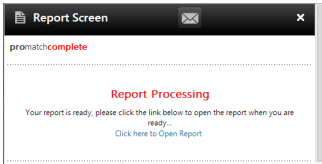
Click the “**Listing Report**” icon, select “Agent Copy”, “Client Copy”, or “Agent and Client Copy”. Then click the “**Preview Report**” button. A Report Processing screen will appear.

Report Options ✕

- Agent Copy
- Client Copy
- Client Copy with Photo
- Agent and Client Copy

Preview Report

This screen will permit you to email the report or view it. When emailed to clients, they will receive a link which when clicked on will present the Listing Report exactly as it appears in your system with the same functionality.



Prepared for you by:

~ Office ~
Promatch Solutions

~ Office Address ~

~ Agent ~
Jeff Relick

MLS: 103873 **ResidentialProperty** Status: Active

List Price: \$179,000 Bedrooms 4 / Baths Total: 3.00 County: Bee

Rooms: 10 Land Size Apx: 3 ac

10315 FM 673 Mineral TX 78125

Yr Built Aprx: 2004

School District: Pawnee

Property Condition: Good

Zoning:

Tax Year: 2013

Taxes-Total \$: \$400

Assn/Subdv:

Assoc Dues \$:

Deed Restrictions: No

Coop: Both

LA - Sq Ft Apx: 2,432

Sq Ft Source: BCAD

Price per Sq Ft \$: 73.60

Style: 1 Story, Mobil-Mod

Construction: Mobile Hm,

Foundation: Block & Beam

Siding: Cement Fiberboard

Roof: Composition

Acres-Apx: 3.00

Land Dimensions: tbd

[Photos](#)

[Docs](#)

[Maps](#)

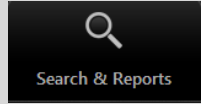
Report opens in new tab.

Agent Information from Agent records.

Click links to see Photos, Documents and Map.

NOTES: _____

Auto Prospecting



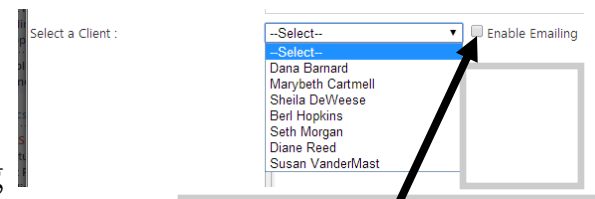
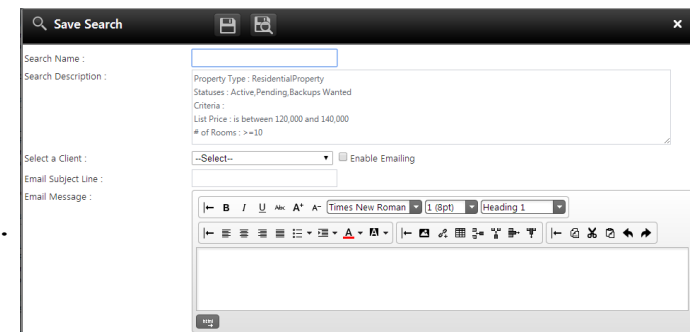
Auto Prospecting helps Agents find properties for their clients. **Promatch Complete** automatically performs searches to find new or edited property listings that match the search criteria the Agent has saved for each prospect, then automatically emails both the Agent and their prospect with the Listing information.

To establish an Auto Prospect:

First, create a contact record for the prospect if they have not already been entered in Contacts (page 18).

As described in the previous section, **Save Searches**, any search can be saved as a Prospect Search.

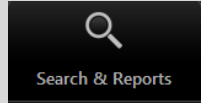
- First, use the Search Screen to identify properties that your client is looking for.
- Once all the search criteria have been added to the search screen, click on the “Save” icon. This will display the **Save Search** screen.
- When this screen is displayed, type in a name for the search. Make sure the name you use is meaningful so the search can be located later. We suggest that you use your clients name to name the search.
- A description of your search is provided. You may modify or add notes to it in the Search Description field.
- By clicking the drop down arrow on “Select a Client” all the contacts in your **Promatch Complete** Contact Manger will appear. Select the Client you want, “Enable Emailing” will automatically check.
- You should write an Email Subject and a message to your client in the space provided. This message will be used each time an auto prospecting email is sent out.
- Remember to save your auto prospecting search by clicking on the “Save Search” icon at the top of the screen.



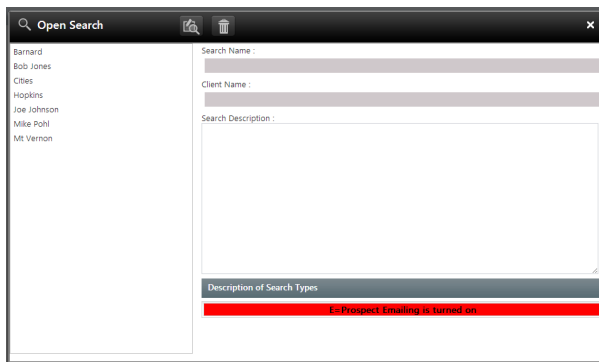
This box must be checked for emails to be sent!

NOTES: _____

Auto Prospecting—How it works



We have created a search and saved it as a Prospect search. Now **Promatch Complete** goes to work. **Promatch Complete** will vigilantly check your MLS system every 3 minutes 24 hours a day, 7 days a week for any new listings or changes to listings that meet the criteria of your Prospect Search. When it finds one, **Promatch Complete** will create an email and automatically send it to the email address in your Contact Manager for the client you selected in the Saved Search screen. The next step is to maintain all your prospect searches. This is done by clicking on the “**Open/Edit Search**” icon at the top of the Search screen. This screen allows you to use, edit or delete any Client Searches or Prospect Searches you’ve saved.



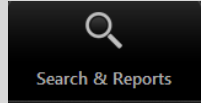
- To Use or Edit a search, click on the search name. Search information will populate in the spaces to the right.
- Now click on “Edit Search”. You will be returned to the Search Screen. All the data from your saved search will be visible .
- From here you may change any of the search criteria, add to your saved Selected Properties through the Browse Screen or review any reports on the existing and/or new Selected Properties.
- If you desire to **SAVE** your new information, click the “**Save Search**” button. This will add your changes or Selected Property additions to your Saved Search.
- To save these changes as an additional search, click “**Save**”, change search name

NOTE
Auto Emailing begins from the moment the auto prospect is saved **FORWARD**. Therefore, it is recommended that you conduct an initial search for your client and email those separately to be sure to capture existing Listings that may meet your clients criteria.

NOTES: _____

Auto Prospecting—Client Web Portal

- Agent View



Emails sent to your Client through auto prospecting will direct your client to a secure web portal link. The Client Web Portal accumulates all listings auto prospecting has sent to your client. The Agent View allows you to conveniently manage all your Auto Prospecting clients from one web portal.

All Client Listings ratings and recorded Likes and Dislikes may be reviewed. You will receive an email of changes made by Clients to your Auto Prospecting client sites.

Agent Info. →

Client Info. (Alphabetical)

- Client Name
- Last Viewed Date
- Portal Expiration Date (30 days after last viewed)
- Contact Button
- Expiration Button (permits extension of expiration to a future date)

Highlight Client's Screens Are Viewable →

Provide Feedback on Web Portal Capabilities →

Buttons Show Screens Client Views:

- View Listing Info.
- Record Likes & Dislikes for each Listing
- Review agent notes on each Listing
- See Listing Report
- View Listing Photos
- View Listing Map

The screenshot shows the following data in the Client Web Portals table:

Client Name	Last Viewed	Portal Expired
Dana Barnard	7/31/2011	1/31/2012
Stan Howard	8/6/2011	2/5/2012
Susan Van der Mast	8/11/2011	2/5/2012

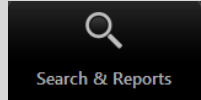
The main listing table shows the following data:

Property Type	City	Close Price	Living Area	Bedrooms	Baths
ResidentialProperty	Pikeville	\$0	0	3	1.75
ResidentialProperty	Prestonsburg	\$0	0	3	2.50
ResidentialProperty	Pikeville	\$0	0	5	3.00

NOTES:

Auto Prospecting—Client Web Portal

- Client View



Emails sent to your Client through auto prospecting will direct your client to a secure web portal link. The Client Web Portal accumulates all listings auto prospecting has sent to your client. Each Client's web portal is exclusive to them and username/password protected. By clicking on the link, the username/password for the client's site is embedded and the client will bypass the sign on screen.

Client may rate Listings with stars and record Likes and Dislikes for each Listing as well as review notes from you.

Agent Info.

- Agent Photo
- Agent Name
- Agent Office
- Agent email
- Agent Phone
- Office Logo

Banners Highlight New Information

- New Listing
- Changes
- New Agent Notes

The screenshot shows the Client Web Portal interface. At the top, there is a header with the agent's photo and name, Jeff Relick, Promatch Solutions, and the Promatch Solutions logo. To the right, it says "website prepared exclusively for Stan Howard" and "this portal is active until 7/26/11". Below the header, there are navigation tabs: Listing, My Notes, Agt Note, Details, Photos, Map, Emails, and Log Off. The main content area displays a list of properties with columns for Price, Rating, MLS#, Property Type, City, Price, Living Area, Bedrooms, Baths, and Map. Three properties are visible: 285 Dwale Hill, 305 Northmonte Point, and another in Pikeville. Each property listing includes a photo, price, rating, and a "New Agent Notes" banner.

Client Info.

- Client Name
- Portal Expiration Date (30 days after last opened)

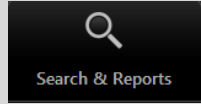
Contact Agent Buttons

Buttons Permit Client to:

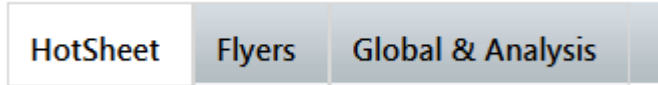
- View Listing Info.
- Record Likes & Dislikes for each Listing
- Review agent notes on each Listing
- See Listing Report
- View Listing Photos
- View Listing Map

NOTES:

Reports View



The Reports View provides access to several types of system reports. Which reports can be used is selected by clicking on the appropriate tab.



HotSheet

A HotSheet report is used to find new listings and listings with a price change or other changed attributes. The HotSheet tab is the default tab for the Reports View. The default report will display all Property Types and all Statuses. You may deselect Property Types or Statuses to narrow down your information. The easiest way to generate a HotSheet is to click the up or down arrow for Past # of Days, then click the “Preview” button. “0” will generate a HotSheet for today. Date ranges may also be entered.

Property Type	Status	HotSheet Criteria
ResidentialProperty	Active	Start Date: 02/16/2014
Commercial	Expired	End Date: 02/10/2014
LotsAndLand	Pending	Past # of Days: 0
MultiFamily	Sold	
RanchFarm	Withdrawn	
Rental		

The HotSheet tab is the default tab for the Reports View. The default report will display all Property Types and all Statuses. You may deselect Property Types or Statuses to narrow down your information. The easiest way to generate a HotSheet is to click the up or down arrow for Past # of Days, then click the “Preview” button. “0” will

Flyers

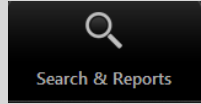
Promatch Complete allows you to create several different flyers for your listing. By selecting the Flyers tab, you can create a custom flyer using data in **Promatch Complete** in 3 easy steps.

The screenshot shows the 'Create Flyer' interface. It has a 'Type of Flyer' dropdown menu with options: Open House, New Listing, For Sale, Just Sold, Price Reduction, and Guest Register. Below this is the 'Pick A Listing' section with an 'Enter MLS #' field and an 'Or Pick from the list' button. Underneath are tabs for 'Active and Pending', 'Expired', 'Sold', and 'Withdrawn'. At the bottom, there are fields for 'MLS' and 'Address'. A 'Create Flyer' button is in the top right corner. Three numbered arrows point to the dropdown menu (1), the listing selection area (2), and the 'Create Flyer' button (3).

1. Choose the type of flyer you would like. **Note:** Listing status and type must match the Flyer being created, e.g. Only SOLD properties can have a SOLD flyer created.
2. Enter the MLS number for the Listing or the select the Listing from the Assigned or Unassigned tabs.
3. Click the “**Create Flyer**” button.

NOTES:

Reports View Continued

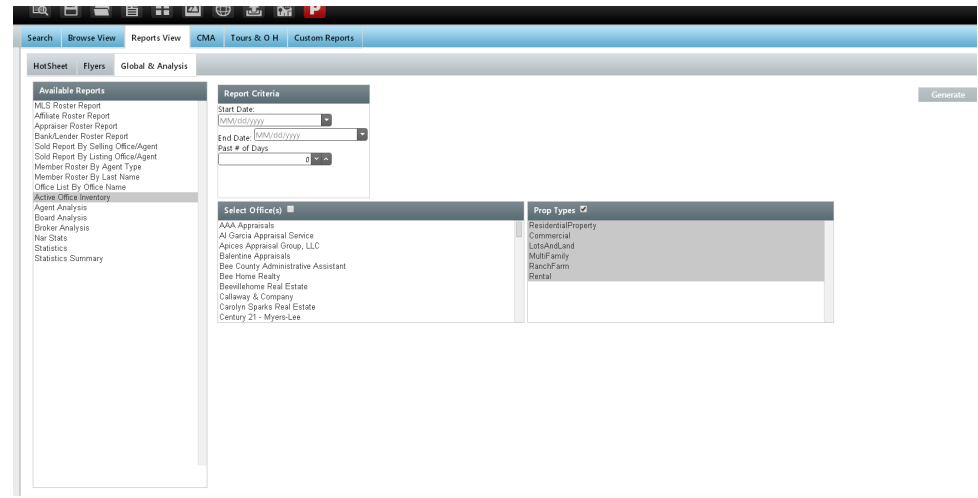


Global

Global Reports gives you access to a host of different broad based reports specific to your Board's or Association's data. The reports you will have access to is controlled by your user name and password and determined by your Board of Directors.

To generate a report:


1. Select the report you would like from the list of Available Reports.
2. Enter the Report Criteria by either increasing "Past # of Days" (0 = today) OR by entering the appropriate date range.
3. If available select the Offices and/or Property types to be included in the report. **Note:** To Select All click the empty box following the category name. The box will have a check mark "√" in it when Select All is turned on.
 - To Deselect All, click on the check mark "√" in the box.
 - Click on individual listed items to create a custom list.
4. Click the "Generate" button to create the report.

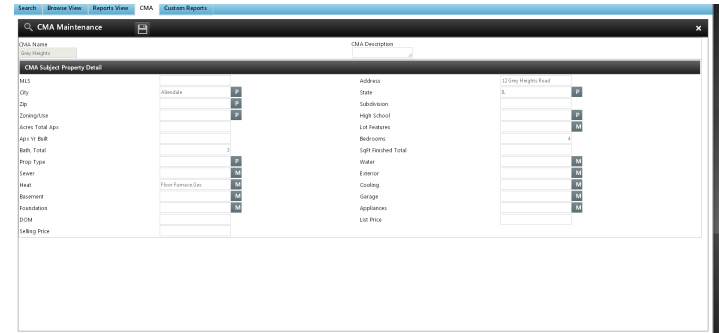
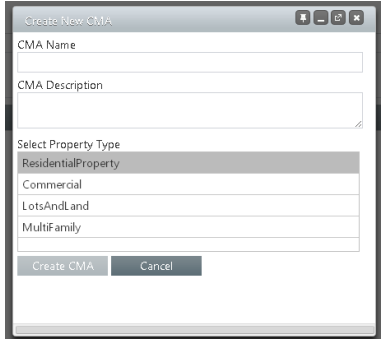


NOTE
Different reports have
different options.

NOTES: _____

CMA reports can be generated or maintained under the CMA tab. To create a new CMA report follow these steps:

- In the CMA tab click the “**New CMA**” icon.  The Create New CMA screen will appear.
 - Give the CMA a name, fill in a description and select the Property Type, then click the “**Create CMA**” button. This will return you to the Main CMA screen.
 - Highlight the CMA name you just created in the Saved CMAs box, then click the “**Edit CMA**” button. The screen to fill in the Subject Property attributes will appear.
 - Fill in the Subject Property attributes to the best of your knowledge, then click the “**Save**” icon. This will return you to the Main CMA screen.
 - To add a photo for the Subject Property, click the “**Add Photo**” icon. Adding and

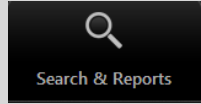


Maintaining photos works as described on the **Adding/Maintaining Photos** page of this guide. **REMEMBER:** The photo in the upper left is the photo which will be presented in the CMA.

You’ve now created the CMA foundation using your subject property.

NOTES: _____

CMA— Using the Report

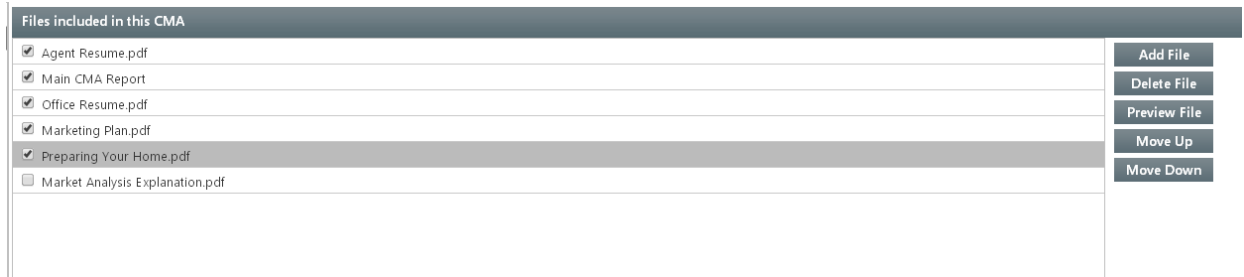


Generating a CMA Report

- To find comparable properties to the Subject Property you are working on you must first conduct a Search. Clicking on the Search tab follow the instructions on the **Creating a Search** portion of this guide.
- Once your comparable properties are selected and appear in the Selected Properties window on the left side of your screen, you are ready to generate your CMA.
- Click on the CMA tab and select the saved CMA you want to use from the Saved CMAs window.
- Clicking the “**Use this CMA**” icon will generate a CMA report including any ed files (see next section).

Presenting Your CMA Report

The bottom portion of the Main CMA screen allows you to uniquely present your CMA to your client. The Files Included in the CMA window lists all the presentation files

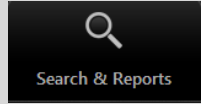


that you have added to **Promatch Complete**. (ALL LOADED FILES MUST BE IN PDF FORMAT.) Here you can control what information is used in each CMA presentation.

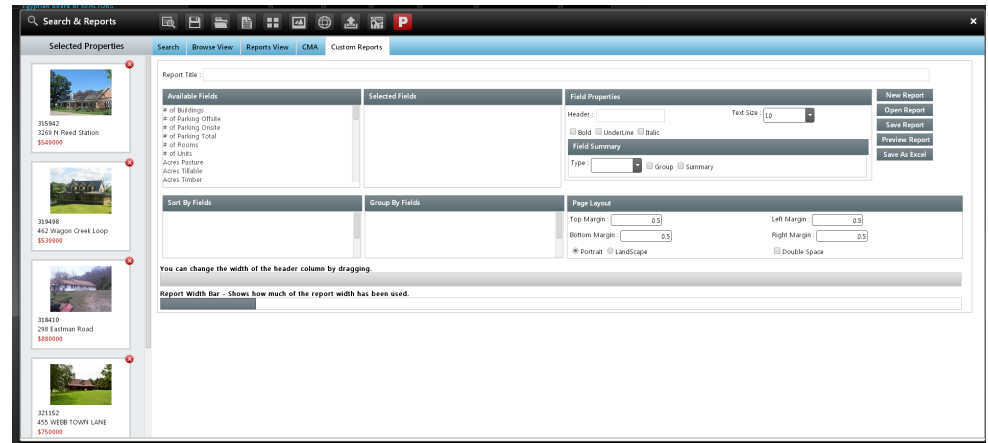
- To add a file click the “**Add File**” button. Files are added in the same manner described on the **Adding Documents** page of this guide. Once a file is added, it will be available for every CMA you create until it is deleted.
- marks represent the files that will be used in the current CMA. s can be turned off or on by clicking on the box in front of the file name.

NOTES: _____

Custom Reports



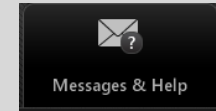
Promatch **Complete** offers a Custom Report generation tool which allows the user to design and save reports utilizing any data fields in the system. By clicking on the “**Custom Reports**” tab you have the ability to view your market data your way. Reports will be applied to the Listings selected during a Search and posted to the left-hand side of the screen.



- Report Title is entered at the top of the screen
- “Available Fields” may be moved to the “Selected Fields” column by clicking on the desired field, then while holding the Left click button down, dragging the field into the “Selected Fields” column and releasing the Left Click button (drag and drop).
- To remove a field from “Selected Fields”, click the desired field, then while holding the Left click button down, drag the field back to the “Available Fields” column and release the Left Click button.
- As fields are added to “Selected Fields” they will appear in the grey Column Header strip at the bottom of the screen.
- Width of the report field can be adjusted in the grey Column Header strip by dragging the column separator with your mouse.
- To modify the look of the Field Heading, highlight the Field name in the “Selected Fields” column, then make Text changes under “Field Properties” on the right hand side of your screen.
- Summary calculations can be performed by column by highlighting the Field name in the “Selected Fields” column, then math function and summary type under “Field Summary.”
- Page Layout is controlled in the Page Layout pod in the lower right hand corner of your screen..

NOTES:

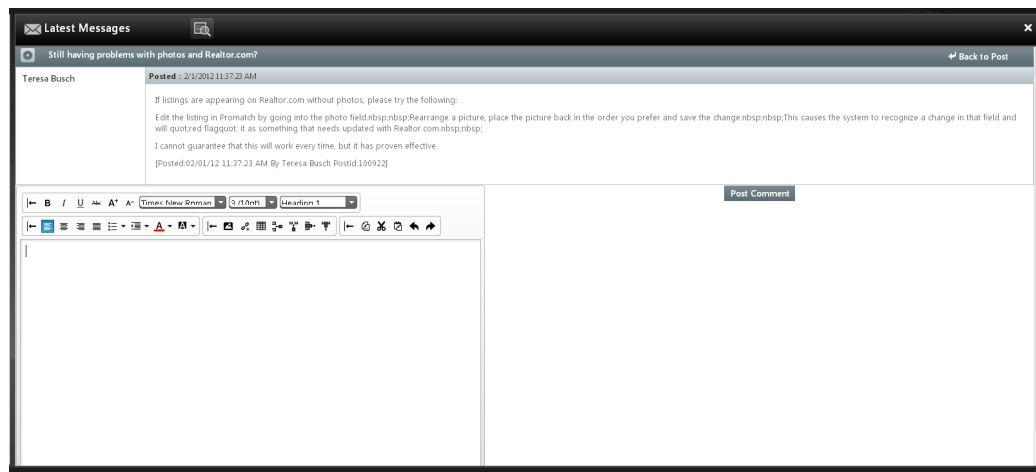
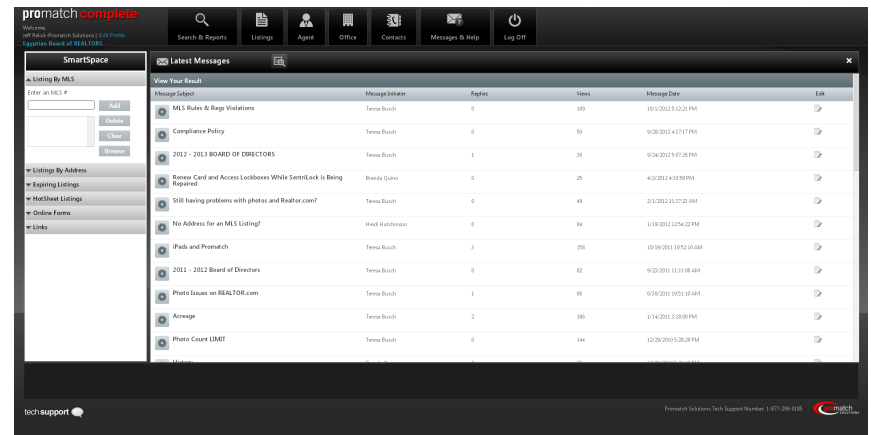
Message Board



The Promatch **Complete** Message Board is built for fast, easy intra-Board communication. Click on the **MESSAGES & HELP** icon, then select “Message Board.”

The Message Board is a one-to-everyone broadcast forum. When a message is opened there is the ability to comment on the message and create a continuing thread of input and commentary.

The Message Board is designed for members and Board Leadership to communicate with one another in a broadcast fashion. All messages posted here will be seen by all members. Members open the messages by clicking the message title and reply if desired keying in their comments and clicking “Post Comment.”



“Back to Post” in the upper right hand corner will return the user to the main Message Board screen.

A new message counter on the main Message Board icon will display the number of unread messages for each user.

Messages cannot be deleted except with the proper security level.

NOTES: _____

Use Promatch Complete on your Tablet

Marketing
Toolkit



MLS Listings are just as easy to access on your tablet as they are on your office computer! Just key in the same URL as you use for your computer and the Promatch Solutions system will recognize that you are using a tablet and direct you to the tablet screens. While the screens are slightly modified from the **Promatch Complete** screens you see on your PC, they work the same way.

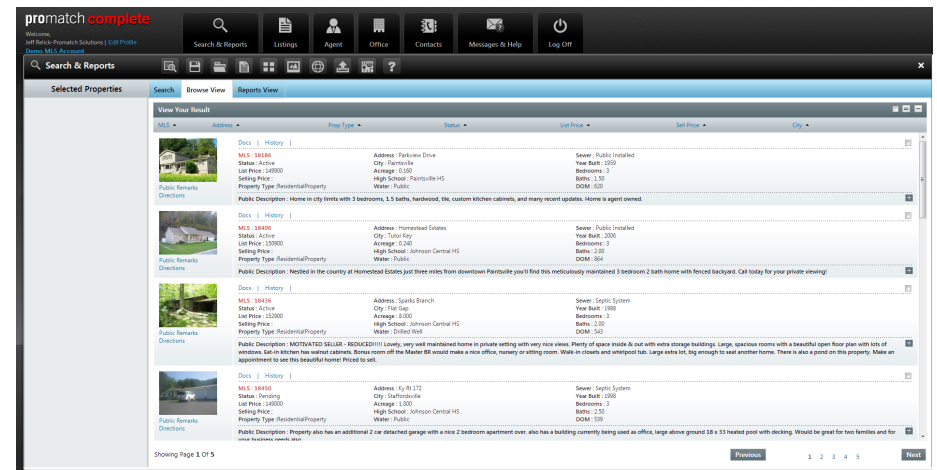
jnar.promatchcomplete.com

(no www!)

You will need your **Promatch Complete** user name and password.

It's easy to use:

- On your tablet, go to your Internet program and open the browser.
- Go to jnar.promatchcomplete.com
- Key in your user name and password.



NOTES: _____

MLS Listings in Real Time, Anytime! Your MLS Listings have gone Mobile! You can access your Board's **Promatch Complete** Listings from any mobile phone or pda that has access to the Internet.

jnar.pmcmobile.com

(no www!)

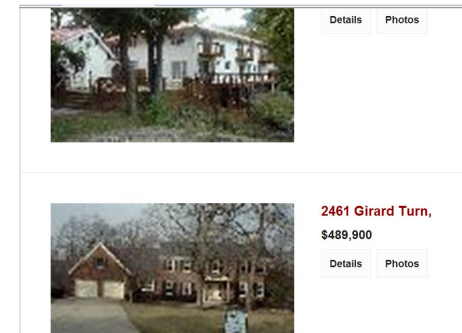
You will need your **Promatch Complete** user name and password.

ITS FREE — part of your **Promatch Complete** service!



It's easy to use.

- On your mobile phone or pda, go to your Internet program and open the browser.
- Go to **jnar.pmcmobile.com**
- Key in your user name and password.
- Select Property Type you want to search.
- Scroll to select your search criteria—including address or MLS number. Only put in the search criteria you need.
- Scroll to the bottom to click on “Search”
- Scroll down the Browse Screen to view the properties presented.
- Click the “Details” or “Photos” buttons to access thumbnail property information or the complete set of photos.



NOTES: _____

Promatch Connected Websites

Marketing
Toolkit

Whether you are on a budget or want a complex, high end Real Estate website, Promatch has a website solution for you!

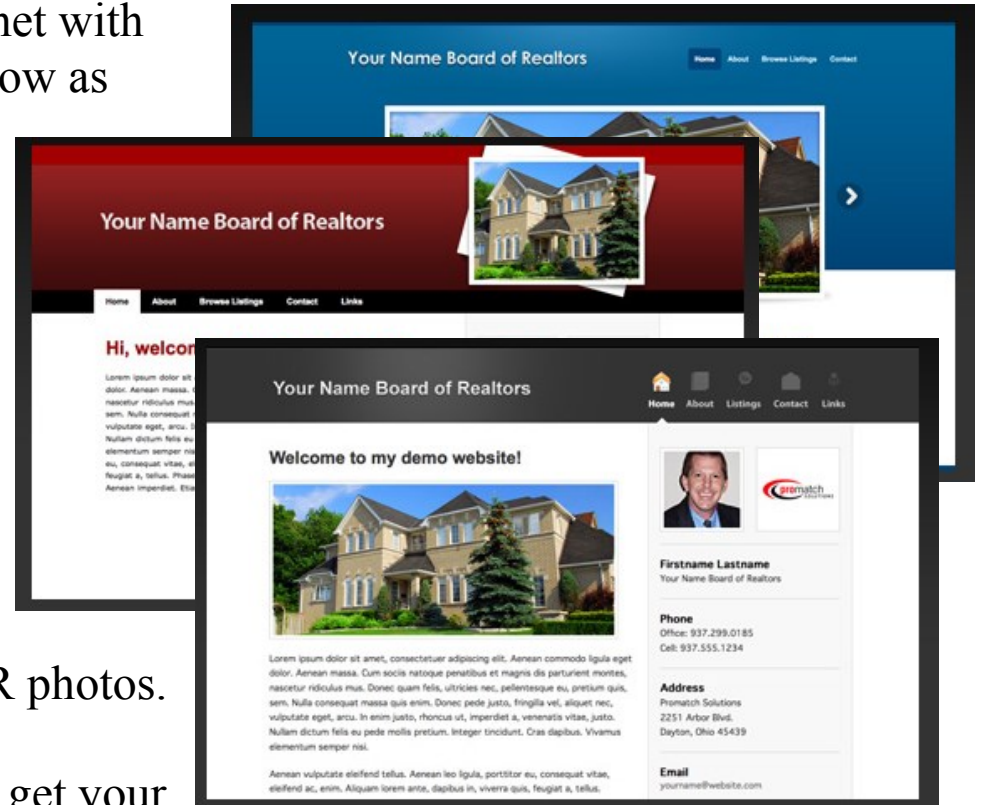
Now you can harness the power of the Internet with Promatch Connected Websites. Starting as low as **\$19.95 per month** for hosting and maintenance (plus a one-time \$30.00 set-up fee) template websites can be designed for Agents, or Brokers.

Or design your own look with a website built for as little as \$1500.00 plus \$30.00 per month hosting and maintenance fee.

All sites feature IDX access to Board listings, YOUR personal branding, AND YOUR photos.

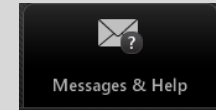
Stop worrying about your web presence and get your website built today!

Go to www.promatchsolutions.com or call 937-299-0185



NOTES: _____

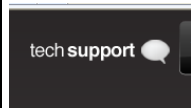
HELP!



Help is available in many forms both within **Promatch Complete** and from Promatch Solutions.

Technical Support

Promatch Solutions offers Technical Helpdesk Support from 8:00 AM to 6:00 PM Eastern Standard Time. The number is **937-299-0185** or toll free **877-299-0185**.



Chat

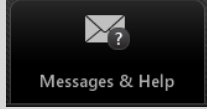
From **Promatch Complete** you may chat directly with technical support personnel at Promatch. If you have a question or need some guidance, click on the **techsupport** chat button at the top of the screen and be connected instantly with technical support personnel. If personnel are engaged and unavailable, or it is after hours, a message may be left through chat and you will be answered as soon as someone is available. Chat is also accessible under Links in **Smartspace**.

Knowledgebase

The Promatch Knowledgebase is a growing database of frequently asked questions. Chances are the question you have has been asked before and the answer is quickly available in the knowledgebase. The Promatch Knowledgebase can be accessed under Links in **Smartspace** or under the **MESSAGES & HELP** Button at the upper right hand side of your **Promatch Complete** screen. Once on the Knowledgebase screen, simply type your question in the "Please Type Your Search Query Here" box and then hit enter. The Knowledgebase will return the closest matches it can find to your question.

NOTES: _____

HELP!



Training Guide

A digital copy of this Training Guide is available in **Smartspace** under **Links** then **Training Guide**. This training guide may be referenced digitally from here or print just the pages you need.

After Hours Support

After hours Promatch Solutions remains on call around the clock to handle emergency system outages. If you experience a system outage after hours that persists for more than 30 minutes, dial 877-299-0185 then dial "5" and leave a message. Your message will be forwarded to the on-call technical representative.

NOTES:

Icon Usability Guide

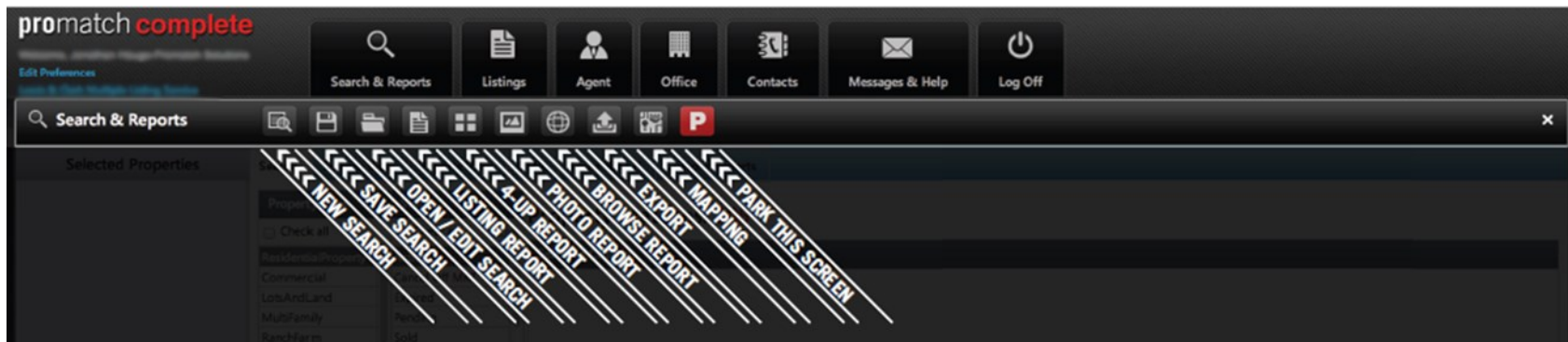
General Navigation



Listing Screen



Search and Reports Screen



NOTES:
