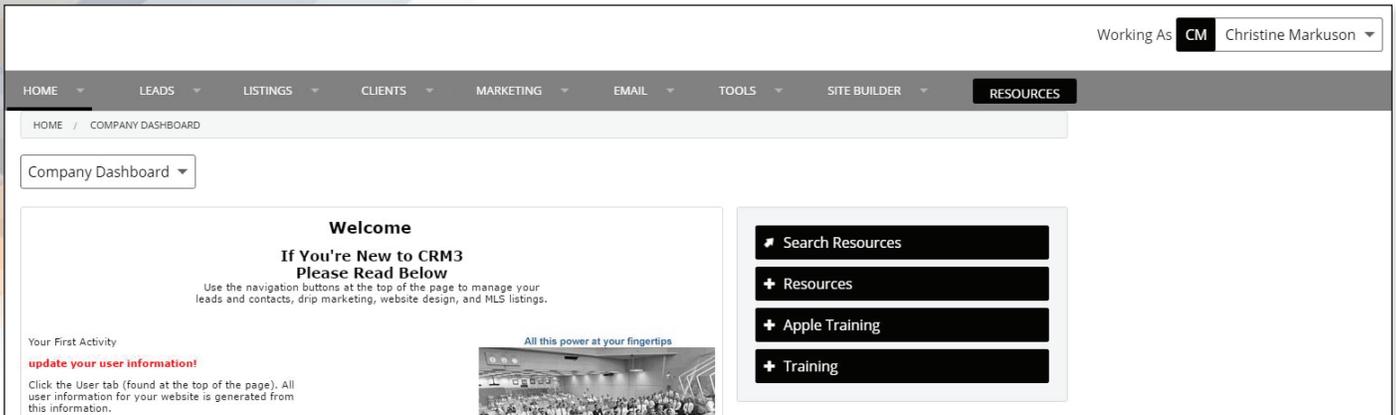


TECH BRIEF

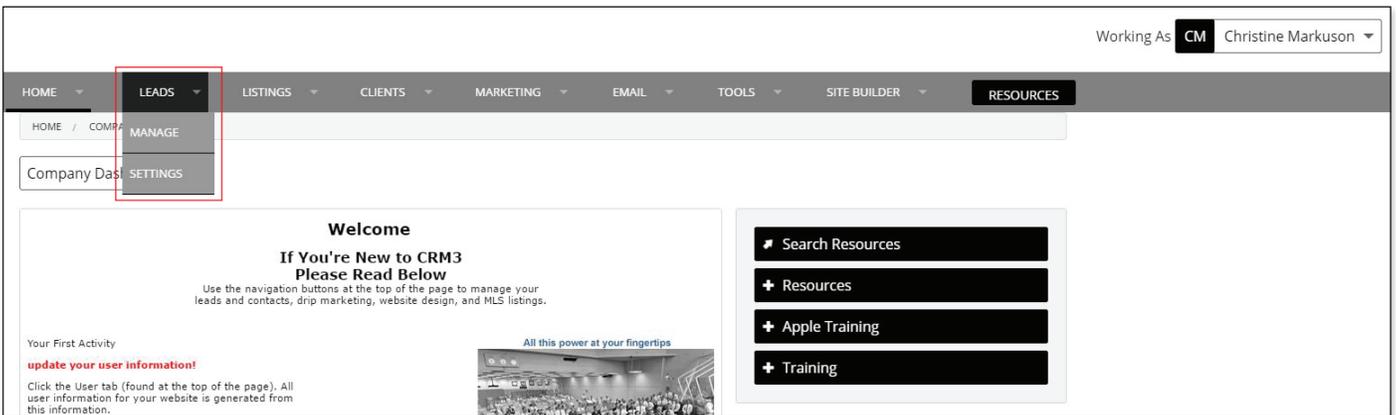
CRM3 NAVIGATION CHANGES

We have made changes to the navigation in our CRM platform to improve usability and increase productivity. We have added and rearranged the location of some menu items. You will notice that some labeling has changed or shortened in preparation for making all of these pages responsive.



Leads

Leads is a new menu item and includes Manage, which used to be under Clients > Main, and Settings which used to be under User > Controls

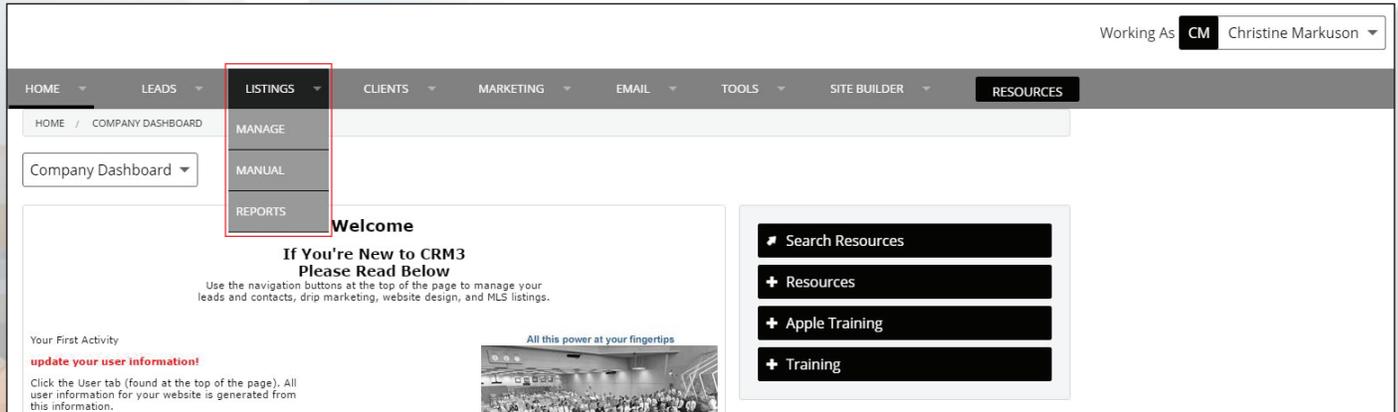


Listings

Listings is the same just the folders have abbreviated labels of Manage (Listing Manager), Manual (Demo & Manual Listings) and Reports (Listing Reports). We also moved Buyers Tour under Marketing.

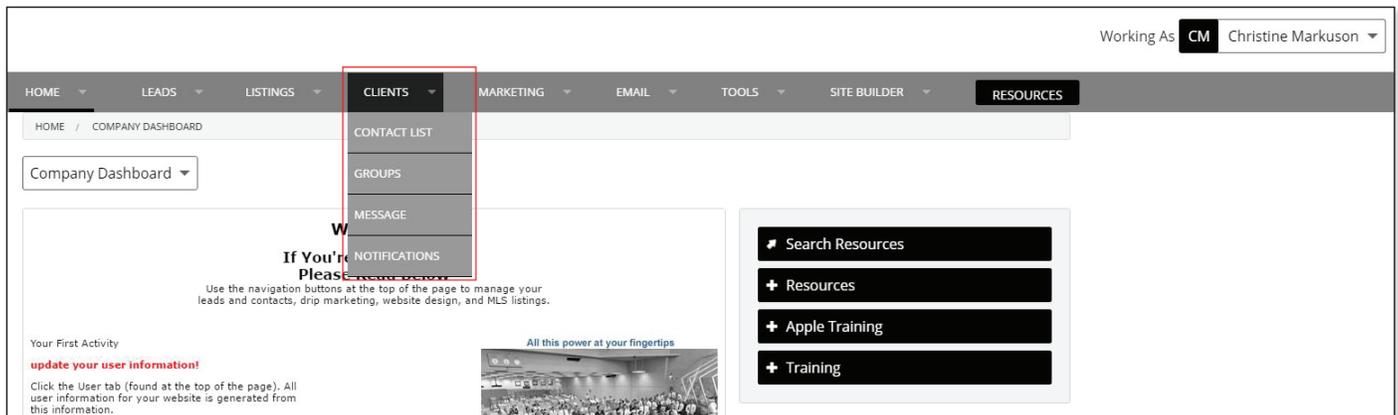
We have a few label changes under Listings, Manage

- Listing Data is now Details | Seller Reports is now Reports | Property Placer is now Location



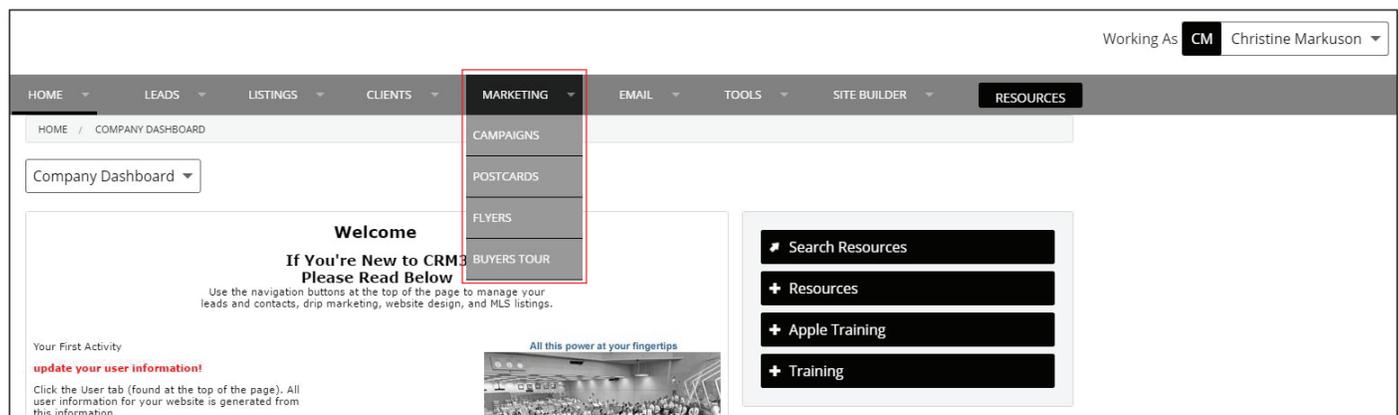
Clients

Here you will see Message (Messages) and Notifications which was moved from under the User Profile Client Email Notification Settings. We have moved Campaigns, Postcards, and Flyers under Marketing. We moved Email/Letters under Email and we moved Calendar and Tasks under Tools.



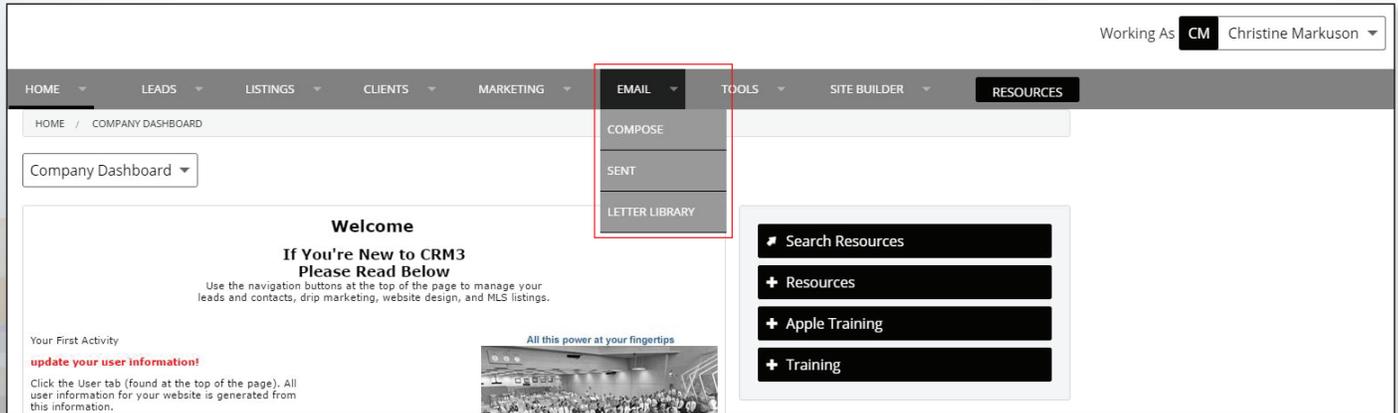
Marketing

Marketing is new and includes Campaigns (My Campaigns, Administrative Campaign Manager), Postcards, Flyers, and Buyers Tour.



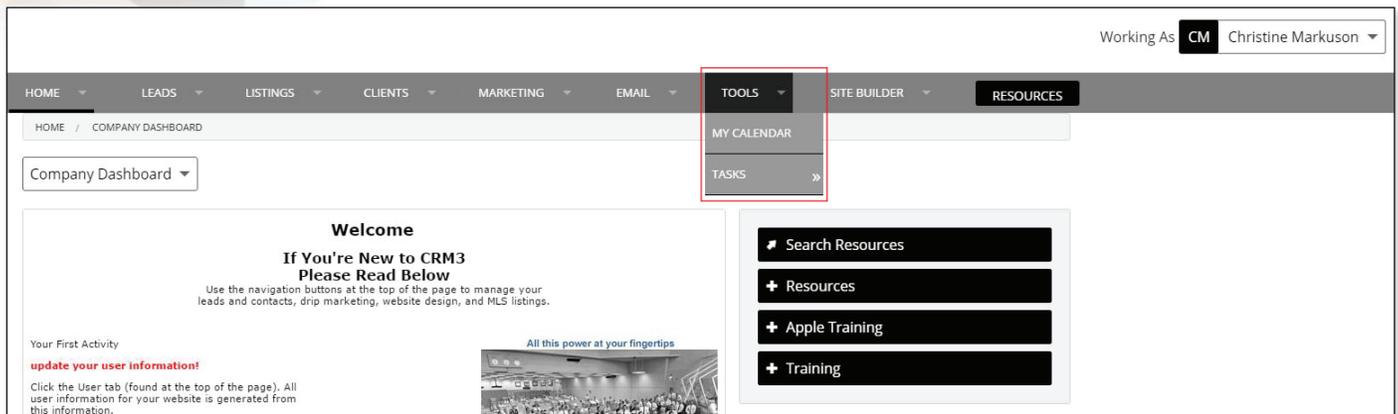
Email

This is new and includes what used to be under Email/Letters. Compose (Compose Email), Sent (Sent Email History), Letter Library which includes Create Letters and Admin Letter Library.



Tools

Tools is a new menu item that includes Calendar and Tasks (Scheduled, Create, Completed).

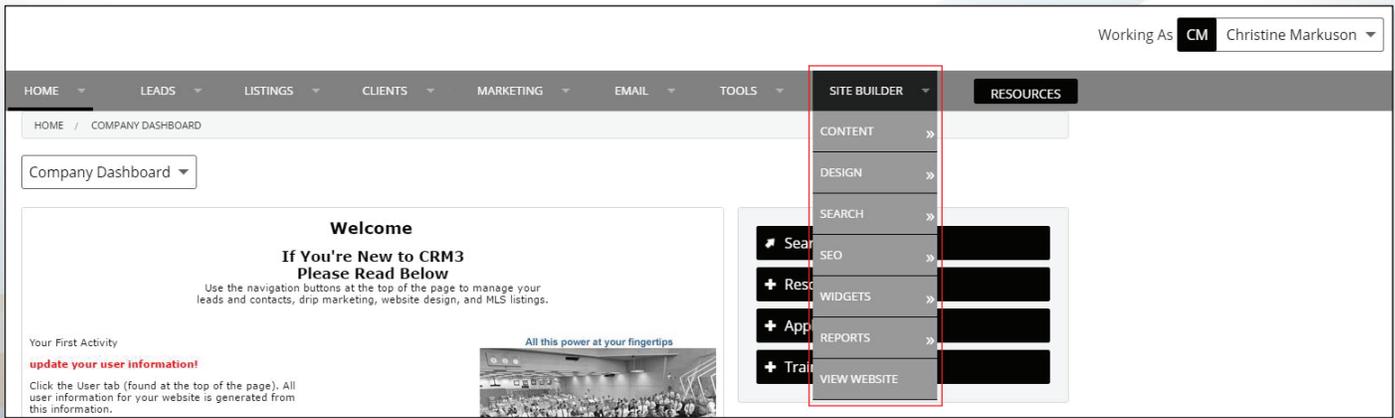


Site Builder

Site Builder is the same but the labels have been shortened or renamed.

- Under Content, Pages (Content Pages), Featured (Featured Properties), and Blog (My Blog).
- Under Design, Graphics (Image Library), Templates (Pre-packaged Designs), Layout (Homepage Layout), and Elements (Site Customization). Domain which used to be found under User is now located here.
- Under Search (Searches), you will find Manage (Manage Searches), Add (Add Searches), Map (My Search Map), and Client (My Client Saved Searches).
- Under SEO (SEO Manager), you will find Pages (SEO Pages), Search (SEO Search Page), Community (SEO Community Pages), Tracking (Tracking Codes), and Verification which is the same.
- Under Widgets, you will see Lead Form (Client/Leads), Search (Search Options), and Framed (Framed Search).
- Under Reports, you will see the Domain Entry Report which used to be under User, Domain.

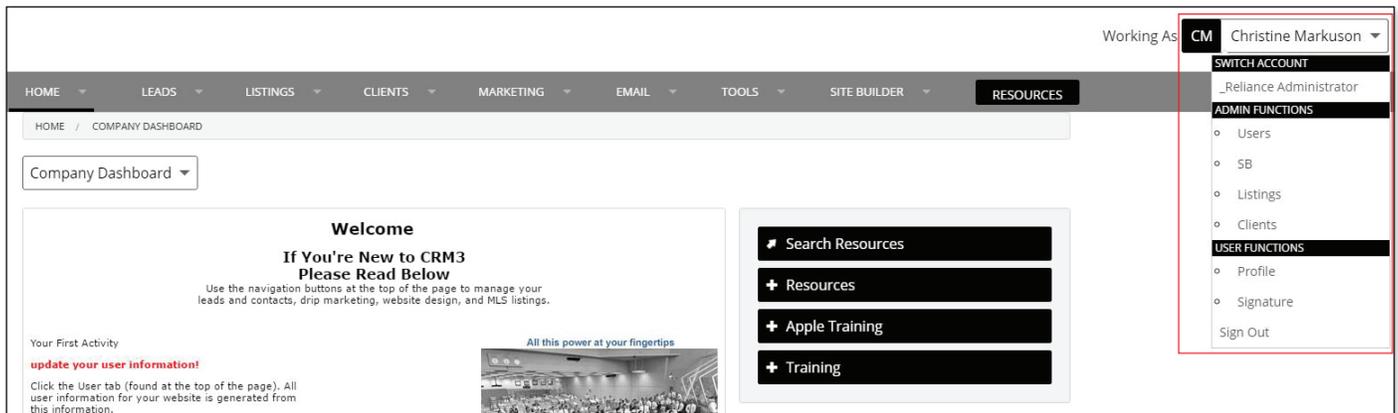
Site Builder - continued



Profile/Working As

You will now access your Profile and Signature (Email) by clicking the down arrow next to your name.

- Profile
 - Change your password at the Account Access Settings
 - Verify entries in the Account Information, Email, Phone Display, [Instant Acceptance](#), Photo, Social Media, MLS ID, and Specialties sections
 - Click 'Submit Changes' below each section as needed
- Email Signature



Notes

Please keep in mind that some navigation menu items are based on site options and yours may vary from what is mentioned here.

Example: If your company previously provided a direct link to a mail service, you can now find the link under Email as 'Web Mail'.

If you have questions specific to your configuration, contact your Reliance Network Account Manager.