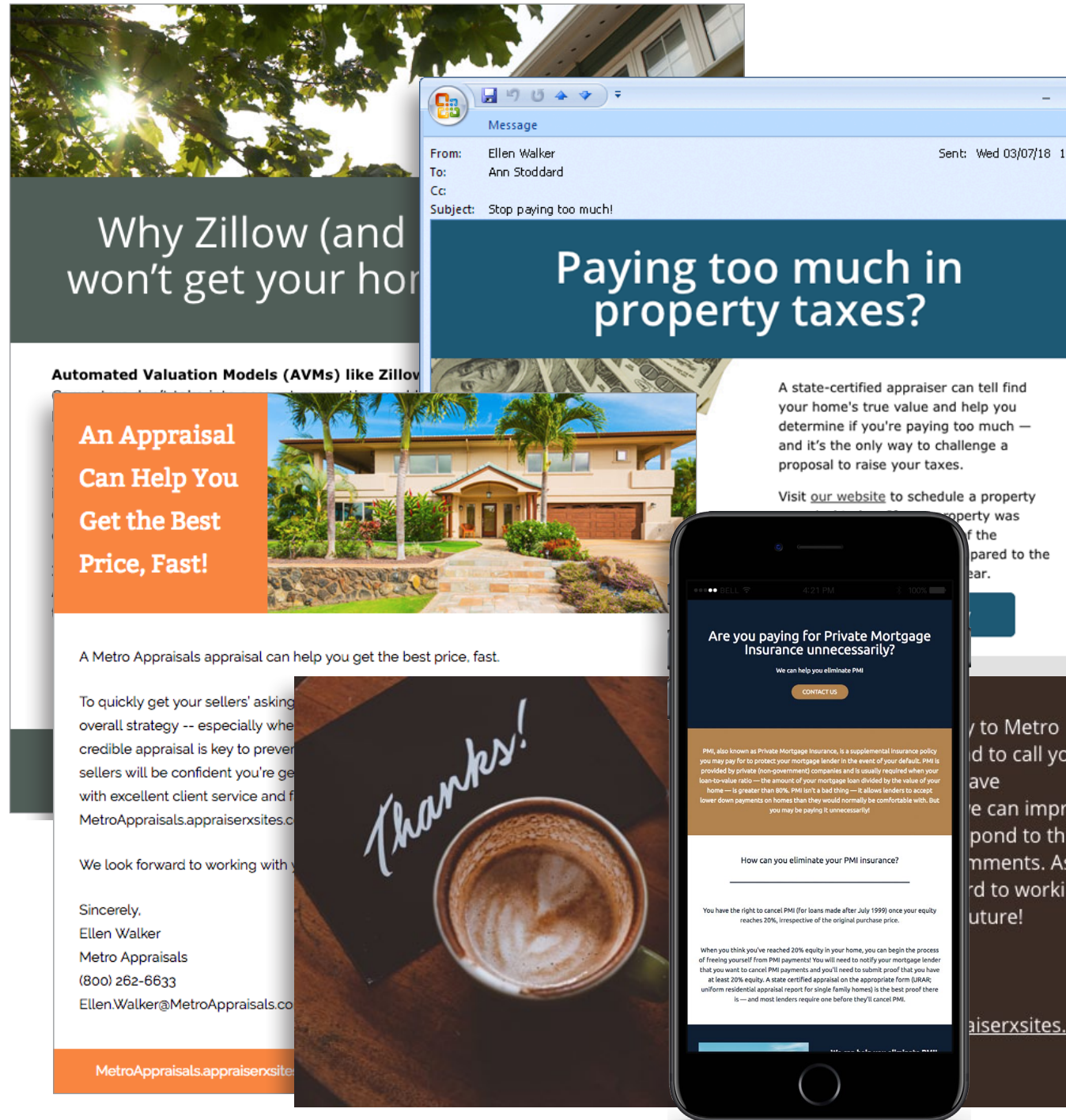


# XSellerate

## QuickStart Guide

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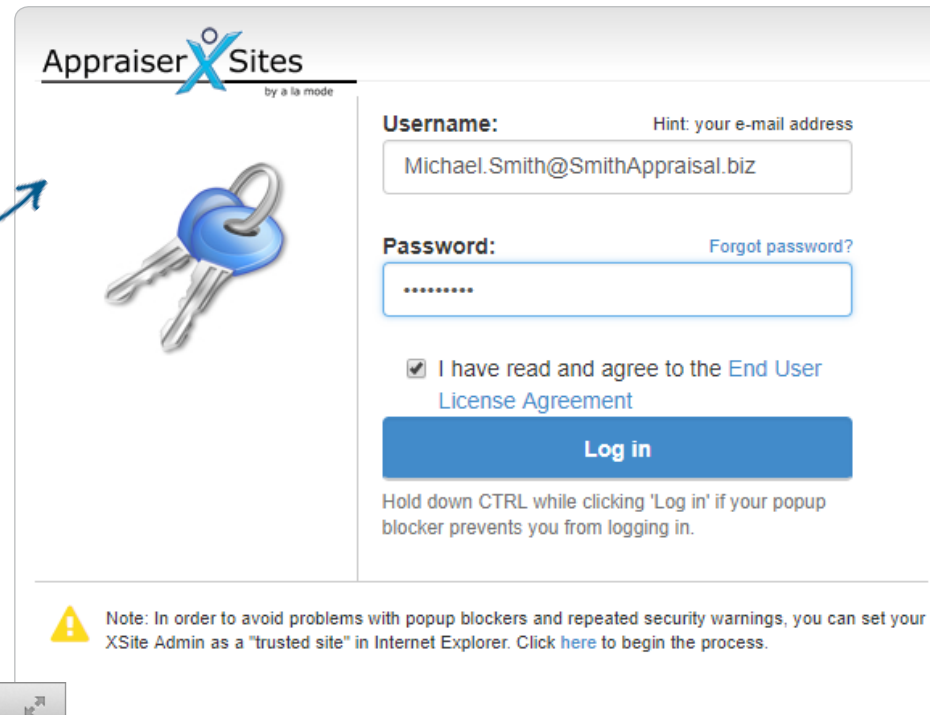
# Logging in

Use the "Forgot password?" link if you forget your password and need to reset it.

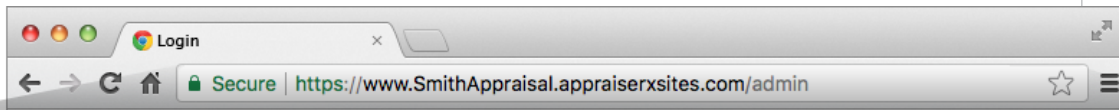
## FIRST-TIME SETUP

We send you an email with a temporary login link when you first purchase XSellerate.

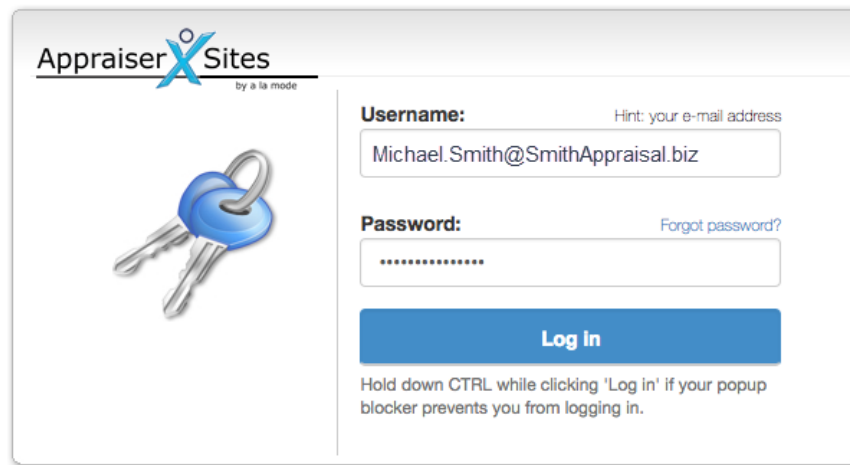
Enter your a la mode **Username** and **Password** as shown in that email, check the box to indicate you agree to the End User License Agreement, and click **Log In**.



The screenshot shows the 'AppraiserX Sites' login page. The header includes the logo and 'by a la mode'. On the left is an illustration of two keys. The login form on the right has a 'Username' field with the hint 'your e-mail address' and the value 'Michael.Smith@SmithAppraisal.biz'. Below it is a 'Password' field with a 'Forgot password?' link. A checkbox is checked with the text 'I have read and agree to the End User License Agreement'. A blue 'Log in' button is at the bottom. A note at the bottom states: 'Note: In order to avoid problems with popup blockers and repeated security warnings, you can set your XSite Admin as a "trusted site" in Internet Explorer. Click here to begin the process.'



Secure | https://www.SmithAppraisal.appraiserxsites.com/admin



The screenshot shows the 'AppraiserX Sites' login page. The header includes the logo and 'by a la mode'. On the left is an illustration of two keys. The login form on the right has a 'Username' field with the hint 'your e-mail address' and the value 'Michael.Smith@SmithAppraisal.biz'. Below it is a 'Password' field with a 'Forgot password?' link. A blue 'Log in' button is at the bottom. A note at the bottom states: 'Hold down CTRL while clicking "Log in" if your popup blocker prevents you from logging in.'

## REGULAR LOGIN

Your initial XSite URL will be **companyname.appraiserxsites.com**.

To log in after you've done the first-time setup, open a web browser and type your XSite's URL, followed by **/admin**.

(For example, if your URL is *SmithAppraisal.appraiserxsites.com*, you'd type *SmithAppraisal.appraiserxsites.com/admin*.)

# User management

[Click here](#) to view the page in our User's Guide which lists everything you can do in User Management.

Before you create your first campaign, take a moment to set up your user profile.

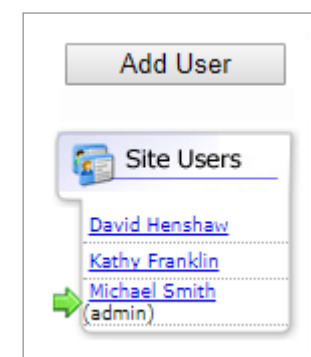
Log in as shown on [p.2](#), hover your cursor over the **My Office** button on the top toolbar, and click **User Management**.



Here you can edit your contact email address and other personal preferences. You can also create additional users, such as a trainee or assistant, with their own login credentials and settings.

In the navigation menu on the left, click **Add User** to create a new user account. Or, select an existing user from the **Site Users** pane. Here you can:

- Change the login email address and/or password
- Edit the name, address, and contact information
- Enable an out-of-office message
- Toggle user privileges
- And more!

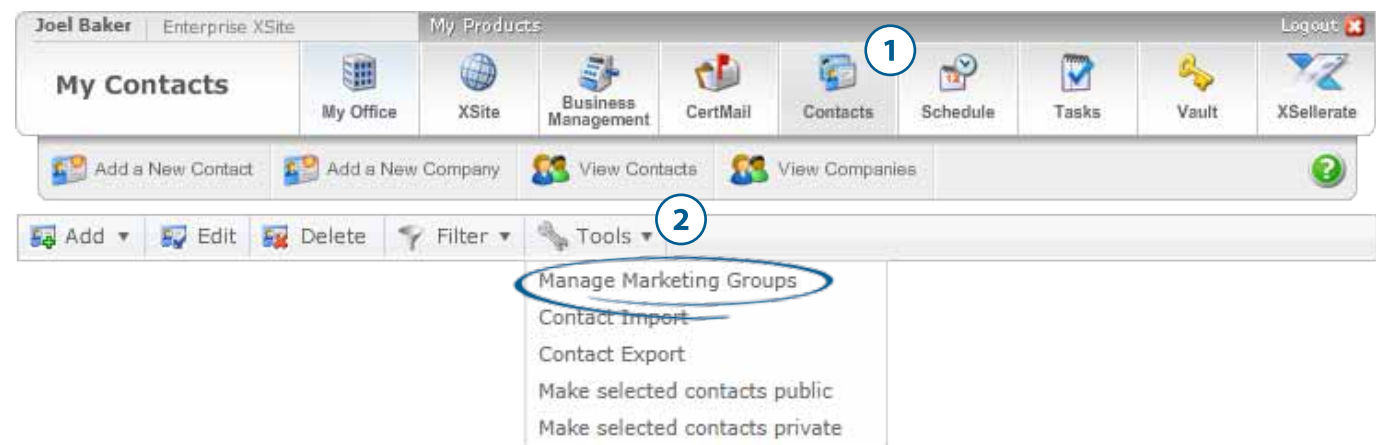


# Marketing groups

*Even if you don't import your contacts right away, it's okay to go ahead and create these categories. In fact, we encourage it! Adding contacts to your Marketing Groups later will update your campaigns automatically.*

With your user profile configured, it's time to set up categories for your contacts. We call these Marketing Groups. Here's how:

1. Click **Contacts** on the top toolbar.
2. Click **Tools**. Then, select **Manage Marketing Groups**.



Groups help you create a plan for your campaigns: what type of work you want to do, and what type of client you want to have.

The more you can narrow down the scope of your groups, the better your campaigns work. For instance, you may start out with just one group for attorneys — but consider making several different ones as subsets of that profession. You might have one just for divorce attorneys and send them targeted divorce or home equity campaigns.

# Contacts

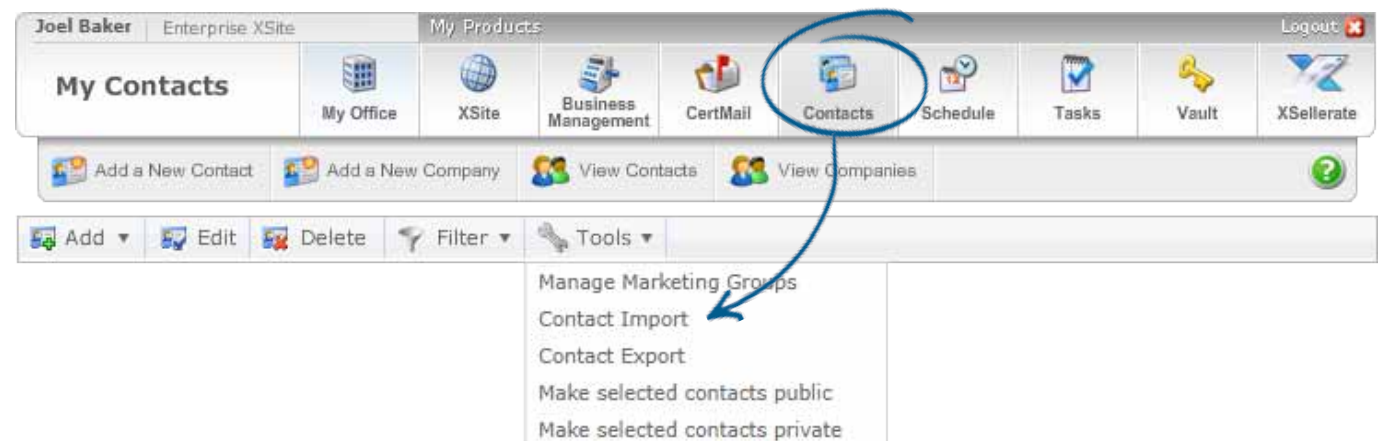
To add contacts individually, simply click the **Contacts** button on the top toolbar. Then, select **Add a New Contact** or **Add a New Company**.



You can also add contacts in batches by importing them from your email client. Whether you use a desktop email client like Outlook or something web-based like Gmail, most professionals already have a large number of contacts just sitting around!

First, export your contacts from your email client as a .CSV file (Comma-separated Values), which is essentially a spreadsheet. Your .CSV file needs to contain certain case-sensitive headings in order to work. [Click here](#) for detailed export instructions.

Once you have a .CSV file with the correct formatting, from the **Contacts** view, click **Tools**, and select **Contact Import**.





# Creating campaigns

Look through our complete list of available ads by clicking the **Ad Library** button on your XSellerate toolbar.



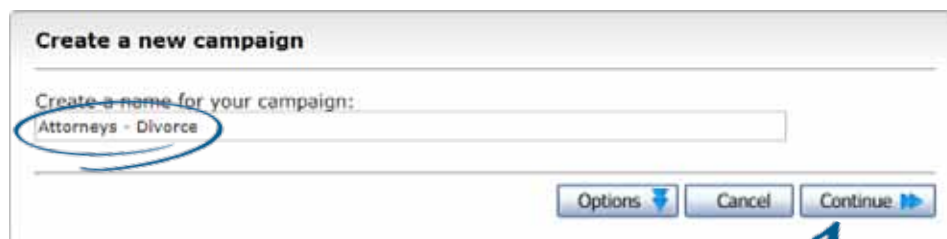
To edit a campaign, simply select it from your Campaigns list on the **XSellerate Home** screen, and click **Edit**.

To create a campaign:

1. Click the **XSellerate** button on your top toolbar to access your **XSellerate Home** screen.
2. Click **Create new Campaign**.
3. Type a name for your campaign.



Optional: If you'd like to use one of our ready made campaigns, click the **Options** button below your campaign name, and select a campaign from the dropdown. ([Click here](#) to learn more about the Options menu.)



4. When you're finished, click **Continue**.

Now, complete the 3 steps of the campaign wizard:

1. **Select Recipients:** Select individual recipients or Marketing Groups.
2. **Content & Delivery:** Choose your ads, and schedule delivery by date or interval.
3. **Review & Send:** If everything looks good, click **Activate Now**, and then click **Finish!**

# Additional resources

Getting started with XSellerate has never been easier. Check out the links below to access our complete library of learning tools!

 User's Guides: [XSellerate](#)

 Support Docs: [XSellerate](#)

 Blogs: [XSellerate](#)

 Video library: [XSellerate](#)

**QUESTIONS? GIVE US A CALL!**

800-211-4514 | 24x7x365