Inspector XSites

Everything you need to manage your business online
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# Inspector XSites User’s Guide

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Getting Started

We’re happy to bring you this new technology and confident you’ll find it an easy way to enhance your inspection business and have some fun doing it!

This online guide has been designed to guide you through your Inspector XSite and provide answers to your questions. Just click the "book" icons on the left side of the screen to access different chapters of this online guide.

Of course, we also offer a printable version of this guide if you’re the type that likes to kill trees. To access a printable version of this guide, just click here to download a PDF version that you can read on screen and print.

End User License Agreement

INSPECTOR XSITES
TERMS OF SERVICE AGREEMENT
IMPORTANT NOTICE TO USER - PLEASE READ CAREFULLY

THE FOLLOWING TERMS OF SERVICE AGREEMENT (THE "AGREEMENT") DETAILS THE TERMS AND CONDITIONS FOR THE WEBSITE HOSTING AND E-COMMERCE SERVICES (THE "SERVICES") PROVIDED AND ADMINISTERED BY A LA MODE, INC. (REFERRED TO HEREIN AS "ALM" OR "WE"). THIS AGREEMENT CONSTITUTES A BINDING AGREEMENT BETWEEN ALM AND THE INSPECTOR XSITES MEMBER ("MEMBER" OR "YOU"). YOU MAY NOT ACCESS INSPECTOR XSITES UNLESS YOU FIRST REVIEW AND ACCEPT THE TERMS AND CONDITIONS OF THIS AGREEMENT BY CLICKING ON THE "AGREE" BUTTON AT THE BOTTOM ON THIS PAGE. AFTER YOU REVIEW THE TERMS AND CONDITIONS BELOW, PLEASE ACKNOWLEDGE YOUR AGREEMENT BY CLICKING ON THE "AGREE" BUTTON OR THAT YOU DECLINE THIS AGREEMENT BY CLICKING ON THE "DISAGREE" BUTTON AT THE BOTTOM OF THIS PAGE.

TERMS AND CONDITIONS

1. Fees and Payment. You shall pay the fees and other charges for the Services as stated on Inspector XSites' home page (http://www.Inspectorxsites.com) or in this Agreement. All fees are due immediately and, except as expressly provided herein, are non-refundable. ALM reserves the right to change its fees at any time. You shall make all payments in U.S. currency. Your credit card will be billed in advance for any and all fees. ALM reserves the right to suspend or terminate your account if credit card charges are denied. Such suspension or termination shall not relieve you of the obligation to pay the fees due. You agree to pay ALM its reasonable expenses, including attorneys' and collection agency fees, incurred in enforcing its rights under this Agreement.

2. Term and Termination.

2.1 This Agreement shall become effective upon your acceptance of the terms and conditions contained herein and shall continue for a period of one (1) year unless sooner terminated as provided below.
2.2 ALM reserves the right to terminate this Agreement for any breach of the provisions hereof or the provisions of the Inspector XSites Acceptable Use Policy, as determined by ALM in its sole discretion. ALM shall have no obligation to refund any of Member's fees due to ALM's early termination of this Agreement.

2.3 If, in the first one hundred (100) days after your purchase of this XSite, you are not satisfied for any reason with the Services, you may cancel this Agreement and receive a full refund of all fees paid. Notice of such cancellation shall be made by contacting ALM at 1-800-252-6633 (1-800-alamode) and notifying the representative that you wish to receive a refund. The notice must be made prior to 5:00 p.m. Oklahoma time on the one hundredth (100th) day after your purchase of this XSite.

2.4 Upon the termination of this Agreement for any reason, ALM shall replace the home page of Member's website with a standard error message at no charge to Member.

3. Responsibility for Member Website Development, Operation and Maintenance. Member will be solely responsible for the development, operation and maintenance of Member's website and all content and materials appearing on-line including, without limitation:

(a) the accuracy and appropriateness of content and materials appearing on the website;

(b) ensuring that the content and materials appearing do not violate or infringe upon the rights of any third party;

(c) ensuring that the content and materials appearing are not libelous or otherwise illegal;

(d) the final calculation and application of shipping and sales tax and for accepting, processing, filling and shipping any customer orders;

(e) handling any customer inquiries or complaints arising from customer orders; and

(f) the security of any customer credit card numbers and related customer information that you obtain or access as a result of conducting electronic commerce via Member's website and to keep all such information confidential and to exercise the same degree of care and security standard in the industry.

4. Member Communication. ALM reserves the right to send Member service e-mails notifying Member of operational or other changes that may affect or change the Services offered by ALM. Please note that you cannot opt out of such service e-mails because these service e-mails provide information critical for the operation of Member's website.

MEMBER HEREBY GRANTS ALM EXPRESS WRITTEN PERMISSION TO SEND FAX AND OR EMAIL SOLICITATIONS OR ADVERTISEMENTS, THUS SATISFYING ANY EXPRESS WRITTEN PERMISSION REQUIREMENT.

5. Amendments/Modifications. ALM reserves the right to amend the Service offerings and add, delete, suspend or modify the terms and conditions of the Services at any time, and to determine whether and when, at its sole discretion, any such changes apply to existing or future Members.
6. Content.

6.1 ALM is not responsible for the content of any web page hosted by ALM. The opinions and views expressed in such web pages do not necessarily reflect those of ALM. The contents of the web pages hosted by ALM are not reviewed in any way before they appear on the web page. As the author of web pages hosted on Inspector XSites, you take full responsibility for their contents. Do not use the web space provided by ALM to provide material that is offensive to the web community including, but not limited, expressions of bigotry, racism, hatred or profanity or for promoting or providing instructional information about illegal activities or promoting physical harm or injury against any group or individual.

6.2 Inspector XSites shall only be used for lawful purposes. Transmission or solicitation of any material that violates any local, state, federal or international law, order or regulation is prohibited.

6.3 Your web pages cannot contain, or provide links to, materials that ALM, in its sole discretion, may consider illegal or offensive including, but not limited to:

(a) copyrighted material not belonging to you -- for example, music, images, software or video -- unless you have the prior consent of the copyright owner;

(b) trademarked materials not belonging to you without the prior consent of the trademark owner;

(c) pornography, nudity, sex or any other material that would commonly be considered "indecent" or "appealing to the prurient interest";

(d) gambling;

(e) foul language;

(f) pyramid or other illegal solicitation schemes; or

(g) insults to other persons or businesses including, but not limited to, material that is obscene, threatening, harassing, defamatory or libelous.

6.4 You shall not use your web pages to conduct any of the following activities:

(a) send bulk/spam e-mail;

(b) send mass/spam news postings;

(c) disclose the trade secrets of any other person or entity;

(d) use patented or trademarked materials without the prior consent of the patent or trademark owner;

(e) rent, sell or otherwise distribute web space to third parties; or

(f) conduct any other activity that ALM determines, in its sole discretion, to be fraudulent, illegal or an unreasonable drain on system resources.

6.5 The financial calculators are made available to you "AS IS" for your independent use and are not intended to provide investment advice. We can not and do not guarantee their applicability in regards to your individual circumstances. A LA MODE MAKES NO WARRANTIES OF ANY KIND, EITHER EXPRESS OR IMPLIED, REGARDING THE
7. Security. You agree that you will not attempt to compromise the security on the ALM servers by any means including, but not limited to:

(a) attempting to gain access to restricted information on the ALM servers;

(b) attempting to disable, cripple or modify ALM servers or any service running on an ALM server; or

(c) attempting to access information in other Inspector XSites accounts.

ALM reserves the right to prosecute any person or entity attempting to compromise the security of the ALM servers to the fullest extent allowed by applicable law.

8. Disclaimer of Warranties. Member understands that the Internet and other various networking communication mediums are not secure, unless explicitly specified as such, and may be subject to interception or loss. ALM makes no representations or warranties of any kind, either express, implied or statutory, concerning the data or information available through Inspectors XSites or the Internet. ALM'S SERVICES ARE PROVIDED ON AN "AS IS" BASIS. ALM MAKES NO REPRESENTATIONS OR WARRANTIES OF ANY KIND, EXPRESS OR IMPLIED, INCLUDING WITHOUT LIMITATION, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE, TITLE AND NON-INFRINGEMENT; THAT THE SERVICES WILL MEET MEMBER'S REQUIREMENTS OR WILL ALWAYS BE AVAILABLE, ACCESSIBLE, UNINTERRUPTED, TIMELY, SECURE OR OPERATE WITHOUT ERROR; ANY IMPLIED WARRANTY ARISING FROM A COURSE OF DEALING OR USAGE OF TRADE; REGARDING ANY THIRD PARTY SOFTWARE OR SERVICES; AND/OR ANY OBLIGATION, LIABILITY, RIGHT, CLAIM OR REMEDY IN TORT WHETHER OR NOT ARISING FROM THE NEGLIGENCE OF ALM. TO THE FULLEST EXTENT PERMISSIBLE UNDER APPLICABLE LAW, ALM DISCLAIMS ANY AND ALL SUCH REPRESENTATIONS AND WARRANTIES.

9. Limitation of Liabilities.

9.1 General. IN NO EVENT WILL ALM BE LIABLE TO MEMBER FOR ANY CONSEQUENTIAL, INCIDENTAL, EXEMPLARY, INDIRECT, SPECIAL OR PUNITIVE DAMAGES WHATSOEVER (INCLUDING DAMAGES FOR LOST PROFITS OR LOSS OF BUSINESS) ARISING OUT OF OR RELATED TO (I) THE SERVICES, (II) YOUR USE OF ANY DATA, INFORMATION OR THIRD PARTY SOFTWARE AVAILABLE THROUGH INSPECTOR XSITES, (III) THIS AGREEMENT OR (IV)MEMBER'S WEBSITE REGARDLESS OF THE NATURE OR BASIS OF THE CLAIM INCLUDING, BUT NOT LIMITED TO, TORT, CONTRACT OR STRICT LIABILITY CLAIMS. IN ADDITION, EXCEPT FOR THE SERVICE LEVEL WARRANTY SPECIFIED IN SECTION 13 HEREOF, ALM SHALL HAVE NO LIABILITY OF ANY KIND OR NATURE TO MEMBER ARISING OUT OF OR RELATED TO MEMBER'S USE OF OR INABILITY TO USE MEMBER'S WEBSITE. IN THE EVENT THAT ALM IS LIABLE TO MEMBER FOR ANY LOSS ARISING OUT OF OR RELATED TO THE SERVICES, THIS AGREEMENT OR MEMBER'S WEBSITE, ALM'S AGGREGATE LIABILITY TO MEMBER WILL IN NO EVENT EXCEED THE AMOUNT OF ANY
9.2 No Liability for Unauthorized Use or Access. Member is solely responsible for ensuring that each password for Member's website is utilized only by Member or, if applicable, by Member's authorized employees and agents. ALM shall have no liability for any loss, claim, damage or other liability that may arise from the unauthorized use of a password. If a password is lost or stolen or if you have reason to believe that your website is no longer secure for any reason, it is your responsibility to notify ALM of such loss or theft so that the password can be deactivated and a new password assigned. ALM will use commercially reasonable efforts to effect password deactivation requests promptly.

10. Member Acknowledgement. Member acknowledges and agrees that the disclaimers of warranties, limitations of liability and indemnification provisions set forth in this Agreement reflect a mutually agreed upon allocation of risk and form a fundamental part of the basis of the bargain hereunder, without which ALM would not have entered into this Agreement.

11. Domain Name. If Member wishes to register a custom domain name ("Domain Name") for the Member's website, ALM will cooperate with Member in registering the Domain Name with the appropriate entity. As between Member and ALM, Member shall own all right, title and interest in and to the Domain Name. Member shall be solely responsible for tracking and ensuring that all required renewals for Member Domain Names are made in a timely manner. ALM will cooperate with Member to renew Domain Names. ALM makes no representation or warranty of any kind concerning the registration of a Domain Name for Member, or concerning the automatic renewal of Domain Names on behalf of Member and under no circumstances shall ALM be liable to Member or any other person or entity in the event that any Domain Name is either not registered or renewed in a timely manner.

As part of the Services provided under this Agreement, ALM will provide reasonable domain name server ("DNS") assistance. If Member arranges for a third party to provide DNS and/or e-mail service, Member shall hold ALM harmless from and against any errors made as a result of the third party's management of Member's DNS and/or e-mail service. If a third party provides DNS and/or e-mail service for Member, and Member requests additional services from ALM concerning Member's DNS and/or e-mail service, such additional services will be provided at ALM's then current hourly rate.

12. Acceptable Use Policy. You shall comply at all times with the terms of the Inspector XSites Acceptable Use Policy, a copy of which may be found at http://www.alamode.com/xsites/aup. ALM may change the Acceptable Use Policy at any time without notice, at ALM's sole discretion. ALM may terminate this Agreement if you violate the terms of the Acceptable Use Policy. The determination of whether the terms of the Acceptable Use Policy have been violated will be made solely by ALM.
13. Service Level. If, due to the fault of ALM, Member's website is not accessible to users for eighty-five percent (85%) or more of the hours in any particular month following the month in which this Agreement becomes effective, then Member shall be entitled to a pro rata refund of the fees paid for such hosting in such month (in proportion to the percentage of the total hours of the month in which the website is not accessible). ALM will not be responsible for refunding any other fees paid by Member.

14. Intellectual Property. Member acknowledges and agrees that Inspector XSites is a valuable commercial product of ALM, the development of which has involved expenditure by ALM of substantial time and money. Member acknowledges and agrees that Member has no ownership rights in Inspector XSites. Member further acknowledges and agrees that the name and mark "Inspector XSites" and all associated names, marks and logos (collectively, the "Marks") are the trademarks and/or service marks of ALM or its affiliates, and that any trade dress, trademark, service mark or designs related to Inspector XSites and/or the Marks are the intellectual property of ALM and are protected by United States copyright laws, trademark laws, trade secret laws, international treaties and applicable laws of the states and jurisdictions where they are used. This Agreement does not grant to Member any ownership right in the Marks or in any other intellectual property of ALM. ALM grants a non-exclusive, revocable, non-transferable license to Member to use solely during the term of this Agreement the graphics, text, musical compositions, tools and modules provided by ALM through Inspector XSites; provided, however, that such graphics, text, musical compositions, tools, and modules may be used by Member only on ALM's server. Such license shall terminate upon the termination of this Agreement. Member shall not, under any circumstances, resell, distribute or allow any other entity or person to use any of ALM's products, modules, tools, scripts, graphics, text, database/programming code or object or source codes without ALM's prior written consent. As between Member and ALM, the parties agree that ALM shall own and retain all intellectual property rights, copyrights, patents and all rights, title and interest in and to all of the products, modules, tools, scripts, graphics, text, database/programming code and object or source codes provided or supplied by ALM that are displayed on Member's website or used in the development or the maintenance of Member's website.

Access to Inspector XSites does not grant to Member the right to reproduce, copy or distribute (except as permitted by ALM on web pages hosted by ALM) by any means, method or process whatsoever, now known or hereafter developed, any of the musical compositions made available by ALM through Inspector XSites including, without limitation, transferring or downloading them to a computer hard drive, or otherwise copying them onto any other storage medium. In addition, access to Inspector XSites does not grant to Member the right to perform publicly, by any means, method or process whatsoever, now known or hereafter developed, any of the musical compositions made
available by ALM through Inspectors XSites including, without limitation, any transmission, retransmission, or further transmission of them. All musical compositions made available by ALM through Inspectors XSites are protected by copyrights that are owned by the individual composers thereof or other parties and all such musical compositions have been licensed by Shockwave-Sound.com for use only on web pages hosted by ALM.

15. Links to Other Websites. As a convenience to Member, ALM provides links to websites owned and operated by third parties not affiliated with ALM. Member's use of the services and products offered via any such linked website shall be at Member's own risk and ALM assumes no responsibility for the products and services offered via any such linked website, regardless of whether ALM receives a referral fee for Member's use of the linked website. Member acknowledges and agrees that ALM shall not be held responsible for the legality, accuracy or inappropriate nature of any content, advertising, products, services or information located on or through any of the linked websites, nor for any losses or damages caused or alleged to have been caused by the use of or reliance on any content from any such linked website.


16.1 Governing Law. This Agreement shall be governed, construed and enforced in accordance with the laws of the State of Oklahoma, without giving effect to its conflict of laws principles.

16.2 Force Majeure. ALM shall not be liable for nonperformance, delay, errors, data loss or other loss caused by any event reasonably beyond ALM’s control including, but not limited to, acts of God, war, terrorism, hostilities, revolution, civil disorder, national emergency, strikes, lockouts, unavailability of supplies, epidemics, fire, flood, earthquake, force of nature, explosion, embargo or any law, proclamation, regulation, ordinance or other act or order of any court, government or governmental agency.

16.3 Legal Expenses. The prevailing party in any arbitration proceeding or other legal action brought by one party against the other and arising out of this Agreement shall be entitled, in addition to any other rights and remedies it may have, to reimbursement for its expenses, including court costs and reasonable attorneys' fees.

16.4 Severability; Waiver. If any provision of this Agreement is held to be invalid or unenforceable for any reason, the remaining provisions will continue in full force without being impaired or invalidated in any way. The parties agree to replace any invalid provision with a valid provision that most closely approximates the intent and economic effect of the invalid provision. The waiver by either party of a breach of any provision of this Agreement will not operate or be interpreted as a waiver of any other or subsequent breach.

16.5 Assignment. Member may not assign this Agreement or any of its rights or obligations hereunder without the prior written consent of ALM. ALM’s rights and obligations hereunder will bind and inure to the benefit of its successors and assigns.
16.6 Independent Contractors. The parties to this Agreement are independent contractors, and no agency, partnership, joint venture or employee-employer relationship is intended or created by this Agreement. Neither party shall have the power to obligate or bind the other party.

16.7 Indemnification; you agree to indemnify and hold ALM harmless from any and all claims and demands, including, but not limited to reasonable attorneys' fees, made by any third party due to or arising out of any information, including, but not limited to, information provided by ALM. The information, software, products, and services may include inaccuracies or typographical errors. Changes are periodically added to the information herein. ALM, its affiliates and/or its respective suppliers may make improvements and/or changes in this site at any time. In no event shall ALM be liable for any direct, indirect, punitive, incidental, special, consequential damages or any damages whatsoever including, without limitation, damages for loss of use, data or profits, arising out of or in any way connected with the use or performance of ALM services and software.

16.8 Entire Agreement. This Agreement sets forth the entire understanding and agreement of the parties and supersedes any and all oral or written agreements or understandings between the parties as to the subject matter of this Agreement. ALM reserves the right in its sole discretion to change or modify this Agreement in whole or in part at any time or from time to time.

Because many of the back-end services in XSites and XSellerate are powered by Microsoft products, we’re required to add a new section to our End User License Agreement. Aside from this update, nothing else in the EULA has changed.

The following section has been added:

Microsoft Notice to USER

Microsoft disclaims to the extent permitted by applicable law, all warranties by Microsoft and any liability by Microsoft, its affiliates or suppliers for any damages, whether direct, indirect, or consequential, arising from the use of the Microsoft software services.

ALM will provide product support for the software services covered under this Agreement, unless otherwise indicated.

In an effort to improve the flow of email from you to your intended recipients, ALM may, from time to time, provide you with feedback from third parties. In the event that your email is deemed SPAM, and you fail to remove the recipient from your lists, ALM may, in its sole discretion, suspend or disconnect your service. In cases where feedback is provided by Microsoft, you shall treat the feedback and all information contained in such feedback as confidential information that is owned by Microsoft, and shall not share such feedback with any third parties.

BY CLICKING ON THE "AGREE" BUTTON BELOW, YOU ACKNOWLEDGE THAT YOU HAVE READ THIS AGREEMENT, THAT YOU UNDERSTAND IT AND THAT YOU AGREE TO BE BOUND BY ITS TERMS AND CONDITIONS. YOU FURTHER ACKNOWLEDGE THAT THIS AGREEMENT CONSTITUTES THE ENTIRE AGREEMENT BETWEEN YOU AND ALM AND SUPERSEDES ANY PROPOSAL OR PRIOR AGREEMENT, ORAL OR WRITTEN, AND ANY OTHER COMMUNICATIONS
BETWEEN US RELATING TO THE SUBJECT MATTER OF THIS AGREEMENT. YOU ALSO AGREE THAT ALL THE TERMS AND CONDITIONS OF THIS AGREEMENT APPLY TO YOUR USE OF INSPECTORS XSITES SHOULD YOU CHOOSE TO PROCEED WITH THE USE OF INSPECTOR XSITES. finally, if member is an entity of any kind, you acknowledge that you are an officer or other authorized personnel for member who has the authority to authorize the payment for the services contemplated under this agreement.

System Requirements

To use the administration area of your site, your PC will need to meet some basic system requirements.

- Operating System: Windows 98 or newer
- Display: 800x600 (Minimum), 1024x768 or higher (Recommended)
- Microsoft Internet Explorer 6 or higher
- Adobe Flash 9 or higher

You may need to turn off ZoneAlarm or other desktop Internet security features if you encounter unexpected errors while managing your site. Alternative web browsers, such as Mozilla, Opera, Netscape and Firefox, are not supported when managing your site. Please limit yourself to the use of a Windows-based PC running Internet Explorer 5.5 or higher when accessing the administrative portions of your site.

Logging In

Upon purchasing, you’re sent an e-mail that tells you how to log into your site for the first time. You’re given the website address as well as the user name and password that were created at the time you placed your order.

After you’ve setup your site initially and registered a domain, you access this administrative area of your site by simply browsing to your domain’s URL followed by /admin

Forgotten Passwords

If you've forgotten your site's username or password, you can reset your credentials through the login area of your site. To reset your login credentials...

1. In your browser, type your site’s URL, followed by “/admin”. For example:
   
   http://www.baytownrealestate.biz/admin

2. In the login screen that appears, click the Forgot Password? link.

3. In the box that appears, you're prompted for your login e-mail address. Enter it and click Continue.

   - If you've set up a security question for your account - Answer the security question you set up in your account and click Continue. Your site automatically generates a new password for your account. Write down the new password and return to your site to log in again. Remember to visit your site's User Management area and update your
account with a more memorable password once you've successfully logged in.

- **If you haven't set up a security question for your account** - To protect your account and the information stored in your site, we must verify that you are the account holder before issuing you new login credentials. You're prompted for either the last 4 digits of the credit card you've used recently on your account or for the invoice number of a recent purchase with a la mode. Enter either into the boxes provided and click **Continue**. You're prompted for a new login password and a security question for you to answer as verification of your identity in the future. Fill out your desired login credentials and click **Continue** to update your account with your new username and password.

Once your password has been updated, return to the admin login area for your site and log in with your new credentials.

**Password Lockouts**

The username and password combination you use to access your site is the key to a wealth of personal and client information. If a criminal or other malicious user were to steal your password, they would gain full access to your online products - and possibly the private data of your customers. To minimize this threat, there are a number of security features surrounding your account and password.

One such feature is the **Password Lockout** system, which prevents any access to your site for 10 minutes in the event that 5 unsuccessful attempts are made to log in. In addition to locking the account, an e-mail message is sent, notifying you of the potential attack.

This feature protects your account from someone trying to guess your password based on personal information they know about you. It also thwarts the use of a computer-based dictionary attack tool. Such tools are designed to rapidly and continuously try single words - as well as combinations of words - that can be found in English or other language dictionaries. By locking the account after 5 tries, the system effectively limits the number of guesses per hour that can be attempted, thus increasing the time required to guess a password to hundreds or thousands of years.

If you receive an e-mail notification indicating that your account has been locked out, contact our Support department immediately at (800) 211-4514. If you were having a problem accessing your account, one of our tech support engineers can walk you through the process of resetting your password. If this was an unauthorized attempt to access your site, we’ll attempt to identify the source of the attack, so you can take appropriate measures.
Other Login Problems

With the number of different forms of malware rampant on the Internet these days, it's common to have at least one if not many different variations of security software installed on your computer. While these are intended to protect your computer, they can also interrupt your work on Internet-based applications if they are not configured to ignore the work you do within those applications. While we in no way recommend uninstalling your security software's and exposing your computer to the Internet, we do recommend that you configure your security software to ignore trusted Internet programs like your a la mode site. If you are experiencing difficulties logging into your site, it's possible that one or more of the following are interfering with your login attempts:

- **One or multiple pop-up blockers** - Pop up blockers are programs that are intended to stop or suppress pop-up advertisements. In order to do this effectively, they must assume that every pop-up you haven't marked as safe is really a pop-up advertisement. While it is true that the most common type of pop-up on the Internet is an advertisement, there are several valid uses of the pop-up inside of various websites like your a la mode site. Depending on your system, a pop-up blocker may be built into your web browser, accompany a 3rd party toolbar like the Google toolbar, come packaged with other 3rd party security software, or a combination of these. We recommend that you add your a la mode site to the list of trusted sites in your pop-up blocker.

- **One or multiple firewall programs** - Windows XP and later versions now come complete with a built-in firewall program, but it's common to have another firewall program installed on your computer. It's also possible and common for large networked companies to have a network firewall installed. While it is good practice to have at least one of these, it can become frustrating if you have several of these working in tandem. Again, we recommend configuring your security software if you're experiencing difficulties logging in.

- **Other forms of system maintenance or anti-malware software** - There are a variety of other programs that you can install on your computer to run routine maintenance on your computer or protect yourself from various other types of malware. Whether a routine maintenance program is deleting a file your site needs to access, like a cookie, or whether another anti-malware program is falsely identifying your site as malware, you may need to find and configure these other programs to ensure that they do not interfere with your site.

For more detailed information on the login problems caused by improperly configured security software, along with steps to address the problem, see our Tech Doc on the matter.

My Office

Your XSite is more than just a web page or billboard. With more and more inspection businesses becoming “virtual” offices, you need something to keep remote employees tied together. That’s what your XSite does – manage orders, e-mail, communicate in forums and more.
In “My Office”, we’ve arranged shortcuts to all the crucial parts of your XSite. As you hover your mouse over shortcuts, you’ll see a description of them appear on the left. This manual gives details on using each module in your XSite so you can get the most from each part.

**My Theme**

The My Theme step of the XSites Wizard controls the general "look" of your site, including the header image, layout, colors and more.

- Themes are broken up into categories and sub-categories. Scroll through the list on the left to select a primary category. The first 10 themes in that category are displayed in the bottom window. Click a sub-category heading to narrow the selections. Click any of the thumbnail images to get a larger view of that theme.
- Animated themes are denoted with the movie reel. These typically have a moving graphic in the header and rollover animation when your mouse goes over the links for your main content.
- All the colors and graphics in your theme are customizable. (That's the next step in the wizard.)

Once you’ve decided on a theme:
1. Click the image for the desired Theme.
2. Click the Choose this theme button to lock in your choice.
3. Click the Save button to lock in your selection, or click the Next button to save it and move to step 2 of the wizard.

**XSites Wizard**

The XSites Wizard is where you actually create your company’s website. We’ve designed our interface so that you don’t need to know complex HTML programming to create a top notch website that not only looks good, but also "does something" like process orders and

Don’t let the easy interface fool you though. There’s serious technology behind your XSite – that’s what makes it possible to change your entire look with just a couple of clicks or enable online ordering by just checking a box. To get started with our easy 10 step wizard, click the link either in the My Office area or at the top of the screen for XSites Wizard.

As you move through the wizard, your changes are made “live” when you click Save or when you simply go to another step.
Theme Preferences

While themes provide a means of specifying an overall look and feel for your site, they’re really just the beginning. In the Theme Prefs of the XSites Wizard, you can completely alter your selected theme to add your own photos, logos, and colors.

Adding Your Company Name

Including a text header is a lot easier than creating a custom header image or formatting your logo and still gives you several options for highlighting your company name.

To add your company name to the header of your XSite...

1. In the ThemePrefs step of the XSites Wizard, ensure that the Include my company name check box is checked.

2. Type your company name in the large text box. This information is pre-loaded with the company name you provided when you signed up for your Agent XSite, but you can change it here.

   **Hint:** To insert a line break in your company name, press Shift+Enter.

3. Above the text box, you’ll find several options for modifying the text. These should be familiar to anybody who’s used a word processor.

4. Turn on Bold, Italics or Underline by clicking the appropriate button.

5. Select the font color by clicking the colored box and choosing a shade from the palette. Note that on dark backgrounds you may want to use white or some other light-colored text. If necessary, the background of the text box will change so you can still see the text.

6. Choose the font style and size you desire from the appropriate drop-down menu.

   **Note:** Your font choices are limited to those standard to Microsoft Windows; that way, your company name appears as intended on nearly all computers.
7. On the sample screen above, you'll see how your text looks on your XSite's header. Simply use your mouse to position your company name exactly where you want it.

8. Enter your **Secondary header text**. This is the slogan that appears in your site header and one of the first things people see on your site.

9. Above the text box, there are several options for modifying the text. As necessary, turn on Bold, Italics or Underline by clicking the corresponding button.

10. Select the font color by clicking the colored box and choosing a shade from the palette. Keep in mind that on dark backgrounds you may want to use white or some other light-colored text. If necessary, the background of the text box changes so you can still see the text.

11. Choose the font style and size you desire from the appropriate drop-down menu.

   If you're using a custom logo file with your company name in it, you can turn off the text by simply un-checking the **Include my company name** box. See the section on **Animating the Site Header** to learn how to animate your site header.

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**Adding a Photo**

If you have a picture of you or your team, it's a nice personal touch to have it on your site. It's also a good way to reinforce your image in the market. Some agents add additional "flair" to their sites by using an action photo or even a picture of a company pet or mascot. The point is that you can use whatever image best suits your purpose.

To include a photo on your XSite...

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**1.** In the Theme Prefs step of the XSites Wizard, click the **Include my photo** check box.

**2.** Now, click the **Upload your photo** link.

**3.** Browse to the photo on your PC. You can use any standard graphic format, such as .gif, .png, .bmp, or .jpg. Select the file and choose **Open**.

**4.** Finally, click **Upload**.

Your photo should now be included on your site. To remove your photo at any time, simply uncheck the **Include my photo** check box. If you desire, you can also remove the photo from the wizard by clicking the **Remove your photo** link.

**Hint:** When you upload a photo, your XSite scales the image to fit in the space allotted, based on the theme you've chosen. At times, this may cause your image to appear blurry or jagged. Instead, we recommend that you create a copy of your photo that is as close to the "optimum" image size as possible. You'll find the best size for your photo - 120 x 160 pixels, for example - listed at the bottom of the My Photo section of the Theme Prefs page.

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**Adding a Company Logo**

Many organizations already have a customized company logo, or perhaps your brokerage or franchisor supplies you with one. You can include this logo on your XSite if you have access to the logo in one of the common, web graphic formats, such as .gif, .png, .bmp or .jpg. If these formats are unfamiliar to you, or your logo is in a different format,
you may need to consult a web-savvy graphics designer to get your logo ready for use.

**Note:** Your logo will look the best when its background matches that of your header image or site background. You'll also want to make sure it fits our recommended size of 240x80 pixels so it "fits" on your site.

To include your logo on your XSite...

1. In the **Theme Prefs** step of the **XSites Wizard**, click the **Include my logo** check box.
2. Next, click the **Upload your logo** link.
3. Browse to the graphic file on your PC that contains your logo, select it and click **Open**.
4. Finally, click **Upload**.
5. You'll now see your logo in your site preview to the left. Use your mouse to drag it to the desired area of your site header.

To remove your logo at any time, simply un-check the **Include my logo** check box. If you desire, you can also remove the logo image from the wizard by clicking the **Remove your logo** link.

### Changing the Background

To change the background image or color behind your site...

1. In the **Theme Prefs** step of the **XSites Wizard**, click the **Change Your Background** link.
2. From the options provided, choose to use one of the **Provided Background** images, **Solid Colors**, or to **Upload Your Own** background image.

3. Select one of the provided backgrounds, a color, or click **Select an Image** and browse out to the background you want to use on your site.
4. When finished, click **Save and Close** to update your **Theme Prefs**.

### Customizing the Header Image

The header image is the graphic in your XSite header. This default image can be changed to one of several included with your XSite, or to a custom image you've created yourself that is more in line with your company style or that reinforces your company's marketing image.
Note: Some Themes do not allow you to change this item. If the Header Image section of the page is not displayed, then this feature is not available for the Theme you have chosen.

Hint: This is the single, largest image on your XSite. It is most likely to get noticed by your visitors, and so you should pay particular attention to what the image portrays. Also, each XSite Theme has a slightly different image size. Below the Header Image links is a note providing the best image size for the theme you've chosen. Make note of this size before you create your graphic.

To change the header image on your XSite...

1. In the Theme Prefs step of the XSites Wizard, click the Change your image link.

2. The Upload Your Header Image window opens, and includes two tabs: The first lets you choose a new header from the collection provided with your XSite. The other lets you upload one from your local PC.

3. To use a Provided Header graphic, first single-click on the file names in the list to see a preview. Once you find the one you want, click Upload. Notice some of these are from other themes. So, if you don't like the layout of one theme, you can still use its graphic.

4. To use a graphic you've created, click the Upload a Header tab.

5. Browse to the saved image on your PC and click Open, then Upload.

Note: Creating a header requires more than basic PC skills and is something you may have fun creating with a photo editor or by paying a graphic artist - just like you paid someone to do your logo. Also, make sure the size of your image is under 50K so visitors won't have to wait too long for your website to load.

Animating the Header

Changes to your site header don't stop with step 2. Under the Extra Tools menu pane located on the left side of the wizard screen, we've provided additional features to give your otherwise "static" company name more pizzazz as your site loads.

Note: Header animations only work with text company names. If you're using a logo file to display your company name, you won't be able to use this feature to animate it.

To animate your header...

1. In the XSite Wizard, click the Header Animation link found in the Extra Tools menu.

2. The company name text box is displayed in the Header Animation box. If you haven't already edited your company name by changing the font color, style or size, you can do it here using the controls located above the text box.

3. The Header Animation feature affects the entire company name, so you don't have to highlight any one part of it.
4. Now, under the **Animation Settings** section, select the various options for the type of animation, target, direction, effect, and timing.

5. As you choose an animation tool, additional options appear below. For example, if you choose the **Fly** animation, a box appears allowing you to select which area of the screen you want the text to "Fly in" from.

6. For a **Target**, you can choose either the **Entire Word**, which animates your company name as one block, or **Each Letter**, which animates each letter separately.

7. Naturally, you'll want to experiment with all the options to find the effect that's right for you. To see how the options you've chosen will look, click the **Preview Animation** button to see it in action.

8. Once you've decided on the animation, just click **Save**.

If you want to turn off the **Header Animation**, just return to this part of the wizard and select **None** for the animation type.

**Color Options**

In the **Theme Prefs** step of the XSites Wizard, you'll find several color schemes that match the default background. You can choose one of these schemes from the drop-down list under **Color Options**. If you want a color scheme that is all your own, you can change the various border, navigation and text colors as well.

- When setting custom colors, you can see which part you are actually changing by hovering your mouse pointer over the description, such as **Top Border Background** or **Background Graphic**. The corresponding area of your preview to the left will flash as you move across the link.

- To change the color, click the colored box to the left of the description and then choose the desired color from the palette. If you're a graphic guru, or your company requires a particular shade of a certain color, you can also type in the "HEX" number of the color at the top of the color palette.

**Button Font Options**

If necessary you can completely change the style, color, and size of the fonts that appear on the buttons in your XSite. To do so...

1. In the **Theme Prefs** step of the XSites Wizard, use the formatting buttons in the **Button Font Options** section to specifying your font, color, size, and formatting for your **Top Navigation** buttons. As the name implies "top" navigation buttons are those buttons that appear across the top of your XSite.

2. Use the formatting buttons in the **Button Font Options** section to specify your font, color, size, and formatting for your **Secondary Navigation** buttons. "Secondary" navigation buttons are those buttons that appear down the left or right side of your XSite.
Site Sounds

Just as retail stores have background music, you can have some on your site to help set you apart from the crowd. To add music or button sounds to your XSite...

1. In the Site Sounds step of the XSites Wizard, select background music that you want to play when someone is viewing one of your site's pages. To sample a song, select it and then click Play.

2. Now, choose sounds for your buttons. This sound plays anytime a site visitor's mouse moves over them.

Hint: If you enable sounds on your XSite, an On/Off "toggle link" is automatically placed at the top of your pages so site visitors can turn the music off. The button sounds, however, will continue to be in effect.

Company Information

In the Company Information step of the XSites Wizard, you should provide as many methods as possible to contact you, and make sure everything is up to date. The information you enter here gets merged into other areas of your site.

- Whenever you change something in this screen, you immediately have the ability to run a Search and Replace to update every page of your site with your new information.
- Use the Site Footer tools to add these contact methods to the bottom of every page on your XSite.
- The My Content list has a Contact Us page that automatically includes this information.

Online Ordering

Having a website as an online billboard to attract and educate clients is a given in today’s business environment. Your website becomes even more valuable when it provides a true service with proven time savings for you and your clients. That’s why the online ordering is one of the most popular Inspector XSite features.

- Status and notes for any order can be viewed 24/7. This eliminates phone tag. Just think. Every phone message someone must either leave or return saves a minute or two. Those extra minutes add up to better turnaround time and better service.
When orders are processed through an Inspector XSite, the final report PDF can be downloaded at any point in the future. Ever need to resend a report because the original e-mail was lost or never got to the recipient? We know it happens all the time. Viruses and unwanted spam have made e-mail almost unusable, so bypass it altogether by posting information on your business website.

Enabling Online Ordering

It only takes a couple of minutes to get online ordering enabled on your XSite. Step 6 is where you begin. Just mark the option for Enable Online Ordering, tracking and Inspection Report delivery.

- Now, specify your XSites Network account ID if you have one and know it. XSite online ordering is powered by the XSite Network, our powerful backend system which has been responsible for delivering millions of real estate reports every month for several years running.

- If you don’t have an XSites Network account, just click the Option to Sign up for a free account. Type your name and whatever you want for a username and password – notice you type the password twice - and we’ll create one on the fly, based on the information entered in step 5.

Be sure to see our section on Creating Client Accounts so you can make online ordering even easier for your clients. After all, some people don’t like “new” processes and often need a little kick start.

Sending Yourself Practice Orders

Naturally, you’ll be curious about the entire online ordering process and will want to send practice orders through the system. You don’t have to create a phony lender account for this. We’ve already got a system in place to simulate a practice order.

1. Browse to your site as a client would, and click Order an Inspection.

2. Fill out information as a client would do.

3. When prompted for login information, use your XSites username preceded by “client_“. For example, if your XSites username was “johndoe@yourdomain.com”, you would use a username of “client_johndoe@yourdomain.com” along with the same password you use for the “johndoe@yourdomain.com” account.

Now when you access a page designed for your clients, your XSite will know automatically to use that built-in client account. This makes it easier and faster to practice with XSite ordering before rolling it out to all your clients.

My Content

Your XSite allows you to include as much information on your website as you desire. We’ve included a number of pre-written documents to get you started. Also, there are mortgage calculators and professionally developed videos to keep your visitors interested. But beyond that, you can create as many Custom pages as you feel are appropriate to your site. Just use the tools provided in the My Content.
step of the XSites Wizard to fill your site with industry relevant content for your prospects to read.

This step of the wizard is divided into 5 sections:

- **Provided** - over 100 professionally-written pages of content to educate visitors on the ins and outs of buying and selling homes.
- **Calculators** - 17 different mortgage calculators to help your clients understand the financial options available to them.
- **Videos** - informative and engaging videos provide your site with a sophisticated edge.
- **Custom** - create as many custom pages as you like to provide localized information, link pages or whatever you need.
- **Local Content** - over 40 professionally-written pages of content specific to more than 20 major cities across the nation.

**Note:** See the Content Editor section for more information on editing the content of any of these pages.

From here you can:

- Include a page on your site by checking the box beside it
- Edit a page by clicking its title or click the pencil icon to its right
- Password protect a page by clicking the lock icon beside it and type in a password for your visitors to enter before viewing it
- Delete a page by clicking the red delete circle to its right

### Multilingual Content

The provided content pages have been hand-translated into Spanish and French. You can enable these by marking the box next to the language.

- When you have multilingual content, you also have a drop-down in the HTML editor where you can switch between the English, French and Spanish version of the page. You may have a totally different "message" for visitors speaking Spanish.
- Likewise, your visitors have a link in the secondary navigation area where they can change the language of your site when your XSite's multi-lingual features are enabled.

Custom pages you've created naturally aren't translated. However, you can create Spanish and English versions of these pages yourself if you wish.

### Service Area Map

If you service different geographical areas, specify them here.

1. While in the XSite Wizard, click Service Area in the Extra Tools pane on the left.
2. A map of the entire US appears allowing you to select counties and regions in multiple states if necessary. Click the first state that has areas you cover.
3. If you can define your coverage areas by entire counties, click Select Whole County. Or, if you're
going to need to specify partial counties either in the current state or an additional state, click **Draw My Service Area**.

**Note:** Your XSite is only able to show either whole counties or what you’ve drawn - you can't combine the methods.

4. Click your counties or draw in your area. To draw an area by hand, just click and drag your mouse to draw a shape. You don't have to do them all at once in case the areas aren’t connected. If you make a mistake, click **Clear Service Areas** to get a fresh start.

5. To pan the map, hover over one of the arrows. Or, click the arrow to move to that state and continue selecting regions you cover.

6. Enter other text you want to appear on the page with your coverage areas. This could point out conditions for certain areas or something similar.

7. From here, you can also mark whether you want the page to be included in your site and define the button name and the URL that links directly to the page on your site.

8. When you're through marking your areas and setting options, click **Save** to lock in changes and click **My Content** in the **Content** pane on the left to return to step 6.

**Multilingual Content**

In the **My Content** step of the **XSites Wizard** you can easily enable multiple languages of the content on your site. The provided content pages - including the online FlexApp 1003 loan application - have been hand-translated into Spanish. You can enable these by marking the box next to the language.

- When you have multilingual content, you also have a drop-down in the HTML editor where you can switch between the English and Spanish version of the page. You may have a totally different "message" for visitors speaking Spanish.
- Likewise, your visitors have a link in the secondary navigation area where they can change the language of your site when your XSite's multi-lingual features are enabled.

Custom pages you've created naturally aren't translated. However, you can create Spanish and English versions of these pages yourself if you wish.

**Organize Content**

The **Organize Content** step of the **XSites Wizard** is where you decide how links to the content on your site are organized. Simply drag and drop the links into the order in which you want them to appear on your site. Just click a page and - while holding down the mouse button - drag it up or down. Then let go and it will go into place.

- The **Primary Navigation** items should be your most important links - the ones you want people to see first.
- Your **Secondary Navigation** should have some organization regarding the content of the links. For example, group the links pertaining to Home Buyers, Sellers or other topics.
• Use the button separator item to add space between buttons and segment items so they aren't all run together
• You can create groups within your Secondary Navigation by clicking the arrows to indent particular button names.

Creating Fly-out Menus

It's easy to create fly out menus within your secondary navigation bar that appear when users move their mouse over a particular item. This is a great way to enhance your site by providing a lot of relevant information for your clients without cluttering your site with too many buttons. To create fly out menus...

1. Click and drag one button item on top of another button item in the Secondary Navigation area.
2. When the Secondary Navigation button that you want to turn into a fly out menu turns dark blue, drop the button item and it automatically creates a fly out menu.
3. To view the items in your fly out menu, simply click the + symbol and the menu items within it are displayed below that button item.

Site Footer

Today most websites contain key information inside the footer of every page on the site. Whether it's your contact information, logos and affiliations, or links to the main sections of your site, you should customize your site footer to provide convenient access to the relevant information on your site. To customize your site footer...

1. From the XSite Wizard, click Site Footer in the Content menu on the left.
2. Check the boxes beside each piece of contact information (taken from the Company Information step) you wish to include in your footer.
3. If you want to provide links to the important pages of your site in the footer, check the Include Navigation as Text Links box in the Site Navigation section. Then, click Customize, check the box beside each page of your site that you wish to include in your footer, and then click Save. For best results, limit the boxes you check to just the MOST important pages of your site.
4. To create your own custom footer, check the Include a Custom Footer box in the Build Your Own Site Footer section. Then, click Customize, use the Content Editor to design your custom footer, and click Update to save it.
5. To include a convenient link to your site administrator login page at the footer of your site, check the Include a Link in My Footer Called "Admin Login" box in the Other Prefs section.
6. To include a foreclosure search tool at the bottom of every page of your site so your prospects can search for foreclosures on foreclosure.com and contact you with questions, check the Include the "Foreclosure Listings" Footer box in the Other Prefs section.
7. When finished, click Save to save your changes or click Next to save your changes and move to the next step in the Wizard.
Domain Management

Your a la mode site comes with your own new domain name or website address. In the manage domains step of the XSites Wizard, you can choose your new address so people to use to access your site. As you mull over this critical decision, keep these pointers in mind:

- It needs to be easy to remember. If it's hard to remember, it's unlikely that a visitor will come back to your site again.
- It should be easy to spell. When it's easy to spell, you can advertise it over your voicemail in addition to your business cards, marketing materials, and any online marketing you do.
- Likewise, avoid punctuation such as dashes and underlines if at all possible.
- Pick something that is pertinent to your business, brand, or location.
- Keep it short. The longer your domain name is, the harder it is to spell/remember and the more frustrating it is to type it into an address bar to get back to your site.
- Make sure it does not create unintended phrases. Since most domains are written in lower-case and without punctuation (like spaces), it's easy to inadvertently create unintended phrases out of your full domain.
- When entering a web address, most people use the default " .COM" by habit. While there are other extensions available (.NET, .ORG, .BIZ for example) be careful picking a domain name for one of these if your competitor has the .COM version of that address.

When the registration is complete, your new domain name will function as the "primary" domain for your website unless you decide to switch to another website address for use with your a la mode site. From here, you have several options:

- Register another new domain name
- Attach a domain you already own to your site
- Switch the primary domain to another one you've attached to your site

Registering New Domains

At some point, you may decide to purchase additional domains for your XSite. Since we do not limit the number of domains you can attach to your XSite, you're welcome to purchase as many domains as you like and mix those in with domains you've already purchased from other registrars. To register a new domain name through your XSite...

Registering Your First Domain

1. When you're ready to register your first domain, visit the Manage Domains step of the XSites Wizard. To jump straight to the Manage Domains step of the Wizard, click the XSite button at the top of the screen and then click Manage Domains in the Content pane on the left.

2. In the screen that appears, type the domain name(s) you wish to register and click Check Availability.
3. If the name you picked is not available, your XSite will prompt you. Just click **OK** and try another domain.

4. Once you find a domain name that is available, your XSite will prompt you about registering it. Just click **OK** to register your new domain and then click **Continue** to return to the domain management screen.

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### Registering Additional Domains

1. From the **My Office** screen, click the **XSites Wizard** button.

2. Click **Manage Domains** in the **Content** pane on the left.

3. Click **Manage and Purchase Domains** in the screen that appears and then click **Add More Domains**.

4. In order to purchase domains through your XSite, you first need to purchase domain credits. To do so, click **Purchase Domain Credits**, click **Checkout**, fill out your credit card information and click **Charge Card**. Once your domain credit purchase completes, close the window to return to your XSite's domain registration tools.

5. Type the domain names you wish to register into the provided boxes and then click **Check Availability** beside each to verify that the domains are available for purchase.

6. Once your XSite has verified the availability of each domain, check the **Available** box beside each.

7. When finished, click **Register Selected Domains** to register the domains and attach them to your XSite. Once the registration is complete, your domain name may take 24 to 48 hours to become publicly available through the Internet as is typical with all new domain names. Once that period has passed, your domain will direct customers to your XSite without any additional effort on your part.
Attaching Other Domain Names

If you already own one or more website addresses that you want to use with your XSite, you can easily attach them to your XSite using the domain manager in your site for free.

To attach a domain that you already own to your XSite...

1. From the My Office screen, click the XSites Wizard button.
2. Click Manage Domains in the Content pane on the left.
3. Click Manage and Purchase Domains in the screen that appears.
4. At the bottom of the screen that appears, click Add Existing Domain.
5. Type your existing domain name into the box provided and then click Submit Domain for Hosting.
6. Once the transfer initiation is complete, your XSite will provide you with the most specific instructions available for your registrar and the current settings for your domain.

   - To complete the process and attach your domain - Follow the provided instructions to change the settings on your domain to our servers.

   - To send the instructions to your technical contact - Type the e-mail address of your technical contact into the E-mail Address box provided. Then, click Send Instructions by E-mail.

   - To view instructions for a different registrar - Just choose the appropriate registrar from the Transfer Instructions For drop-down.

Once you make the necessary changes to your domain, your XSite will take care of the rest. Keep in mind that any setting changes you make to your domain may take between 24 and 48 hours to complete as those changes have to make their way across the entire Internet. This "down time" cannot be avoided either through XSites OR through any other website provider so be sure to account for a website and e-mail outage for any websites or e-mail attached to that web address.

Checking Status on Submitted Domains

Once you've submitted a domain for attachment to your XSite and made the appropriate changes to your domain, it can still take up to 48 hours for the changes to take effect. To keep you up to date about the status of your domain, your XSite provides a simple domain status area. To access it...

1. From the My Office screen, click the XSites Wizard button.
2. Click Manage Domains in the Content pane on the left.
3. Click Manage and Purchase Domains in the screen that appears.
4. At the bottom of the screen that appears, click Add Existing Domain.
5. Scroll down to the Your XSite Domain Pool section and click the Click Here link inside the XSite notification.
6. In the screen that appears, your XSite lists all pending domain attachments and their current status. From here, you can:
   - **View the instructions for your registrar again** - Just click the **Status** link beside your domain.
   - **Cancel the attachment process for a domain** - Click the **Cancel** link beside that domain.
   - **Attach another existing domain to your site** - Click **Add Existing Domain** and follow the steps above.

**Switching Primary Domains**

If you've attached several domain names to your XSite, you may decide to switch the "primary" domain to another domain you've attached. For instance, if you had attached both "realestateservices.net" and "realestateservices.com," you might decide that you want to make "realestateservices.com" the primary domain for your site. By doing this, you also migrate all of your CertMail e-mail boxes to the new primary domain name that you pick. To switch the primary domain on your XSite (and the e-mail addresses associated with it)...

1. From the **My Office** screen, click the **XSites Wizard** button.
2. Click **Manage Domains** in the **Content** pane on the left.
3. Click **Manage and Purchase Domains** in the screen that appears.
4. Scroll to the bottom of the screen and click the **Change** link beside the **Your Primary Domain Is** label.
5. Select the domain you wish to use as your primary from the list provided and then click **Continue**.

**Note:** Remember that if you're using CertMail this will change your e-mail addresses and XSite login address as well.

**Adding E-mail Space & Accounts**

By default, your XSite comes with between 1 and 10 user/e-mail accounts and 100 MB of storage space depending on the package you purchased. If you need to buy additional user/e-mail accounts or additional storage space, you can do so through your XSite's **domain manager**. To buy e-mail accounts or storage space...

1. From the **My Office** screen, click the **XSites Wizard** button.
2. Click **Manage Domains** in the **Content** pane on the left.
3. Click **Manage and Purchase Domains** in the screen that appears.
4. In the **Your Domain Accounts** section, click **Upgrade Your Account**.
5. In the screen that appears, check the box beside each website address to which you need to add e-mail storage space or additional e-mail addresses. Then, click **Continue**.
6. Click **Checkout**, enter your payment information, and then click **Charge Card** to complete the upgrade.
Attaching Domains to Pages

If you need to attach one of your domain names directly to a specific page of your site, you can do so through your site's domain manager. To attach a domain name to a page of your site...

1. From the My Office screen, click the XSites Wizard button.
2. Click Manage Domains in the Content pane on the left.
3. Click the Manage and Purchase Domains link.
4. In the window that appears, scroll down to the Your XSite Domain Pool section and find the domain you wish to attach to a page of your site. If the domain isn't listed, first attach the domain to your XSite. Then, click the Select Page link beside the domain you wish to associate with a page.
5. Mark the Point this Domain to a Page option. Then use the Active and Inactive options beside the Content to find the page you wish to associate with the domain in the list on the right.
6. When you find the appropriate page to associate with your domain, click to select it in the list on the right and click Continue.

Parking Domains

If you have multiple domains attached to your site and you need to park any one of those domains so that your site is inaccessible through it, you can do so through your site's domain manager. To park a domain in your XSite...

1. From the My Office screen, click the XSites Wizard button.
2. Click Manage Domains in the Content pane on the left.
3. Click the Manage and Purchase Domains link.
4. In the window that appears, scroll down to the Your XSite Domain Pool section and find the domain you wish to attach to a page of your site. If the domain isn't listed, first attach the domain to your XSite. Then, click the Select Page link beside the domain you wish to associate with a page.
5. Mark the Park this Domain option and click Continue.

To unpark the domain at a later time, just attach the domain to a page of your site.

Site Summary

The Site Summary step of the XSites Wizard, provides a simple overview of key information about your site. For convenience, it includes a Launch My XSite button that you can use to view the current design of your site and some basic information about how you can view and log into your XSite.
Note: You do not need to click the Launch My XSite button to officially launch your website. The changes you apply to your site take effect immediately as you make them. This button simply provides a convenient way to view the sum total of your design changes through the XSites Wizard.

Extra Tools

This collection of tools can help you manage your domain names, animate your site headers, search and replace text throughout your site and manage the documents, graphics and other files you have uploaded.

My Intro

Intros are often used on web sites to introduce visitors to your business, or to highlight a new service offering. Your XSite lets you create a dazzling intro based on Adobe's Flash software without having to learn any programming languages. In the Extra Tools menu of your XSites Wizard (located on the left side of the screen) click My Intro. You have three options for your site's intro:

- **Disable your site intro** - This means visitors to your site will go straight to your home page.
- **Use basic intro options** - We've got several intros already built. Just take a minute or two to pick one, customize the colors and enter text. It's fast and easy.
- **Use advanced intro options** - The Presentation Builder lets you put together a whole slide show that plays when someone visits your home page. You get to pick the images, timing, text, and animation.

Basic Intros

To implement a Basic Intro...

1. In the My Intro tool, click Use basic intro options.
2. Click a template in the list on the left. To see a preview of the template, click Preview.
3. Select the music you'd like to have accompany your intro from the list on the right. To hear a sample, click Play.

4. Enter the 5 messages you want to "fly" in during your intro.

5. Choose a background color by clicking the color button and choosing one from the palette.

6. To see how your intro looks, click Preview My Intro.

Presentation Builder

The XSites Presentation Builder is used to create Advanced Intros for your site. It lets you build a slide show full of your own images, text, timings and animation - all without prior knowledge of Flash programming or anything beyond basic computer skills.

1. First, gather together the images you wish to use and have some idea of the text you want with each image. If possible, save all of the images in one directory on your computer's hard drive.

2. Then, in the XSites Wizard, click My Intro in the Extra Tools menu. Mark the Use advanced intro options option. You'll see a grid with any previously created intros. (If this is your first time for your site, the grid will be empty.)

3. Click Add New Intro to open the XSite Presentation Builder. This is a simple 5-step wizard that leads you through the creation process. To move through the wizard, just complete each screen and click Next. At
any time, you can click Back to return to the previous step.

4. The first step is to name the presentation. This is only for your internal use, so you can call it whatever you like.

5. Next, choose a background color. We give you choices that match your site, but you can pick anything you want by clicking the color swatch on the right for Pick a new color.

6. Choose your background music. To hear a sample first, click Play.

7. Now, add a slide for the first of your images. Click Upload Image, then, click Browse to find and select the image on your system and click Upload. Repeat this process to upload all of the images you'd like to use in your presentation. Once the images are loaded, continue with the following steps for each image.

8. First, decide how long you want the image displayed by changing the number of seconds next to Display Time. Be sure to add time in for any animation for the image and text.

9. Now, enter the Caption to go with the image. After typing the caption, you can drag it to another location on that slide. Just click on the caption text in the slide preview and move it.

10. To customize your caption further, click Advanced Options.
    o You can select a new font for the caption and how you want its presentation animated - i.e. fade in, fly in, etc.
    o You can customize the animation, deciding if it affects individual words or letters and what happens to each word or letter.
    o Click Preview once you've selected your options. While getting familiar with the intro builder, you'll certainly want to try the all the options to see what you like the most.
    o Click OK to save the options for that particular slide's caption.

11. In the slide preview at the bottom of the window, you'll see a button with Fade on it. A fade-in is the default animation for your slide, but you can click the button and choose a different transition for the slide.

12. While choosing the transition for the slide, you also choose an additional effect to be used on the image as it comes into view.
    o To sample the different effects and transitions, just choose one and click Preview.
    o If you want to use the same transition and effect for all slides, just mark the box at the top of the Slide Transition dialog for Use for all slides.
    o Click OK when you've chosen your slide transition.

13. Click Next when you're through adding slides. You can now choose to preview the presentation, go back to a particular piece of the presentation or click Save & Close to go back to the XSites Wizard.

When you are through building your presentation for an Advanced Intro, be sure to select it from the list. Then click Save to make it live, or just click Next to save the changes and move on to the next step in the wizard.
File Library

This is where you can see and manage files, such as digital photos or online documents that have been saved to your site. You can also add other files from here - making it easy to add hyperlinks to them when you are editing pages on your site. To add a file to your File Library.

1. From the XSite Wizard, click File Library in the Extra Tools pane.
2. Click Add New File. Then, click Browse.
3. Locate the file on your PC - this may be a PDF, JPG, MP3 or anything you wish to have accessible on your XSite - highlight it, and click Open.
4. Repeat this process for any additional files you wish to upload and then click Upload Files to add them to your file library.

Once the upload process is complete you can preview any file you've uploaded by clicking the filename and then clicking Preview Selected File.

Search & Replace

XSites contain a great feature that can run a search and replace on multiple pages at one time. This is useful for replacing generic phrasing in our provided content with something more personal.

1. Click Search & Replace under the Extra Tools section of the XSites Wizard.
2. Enter the phrase you want to replace.
3. Now, type what you want it replaced with.
4. Select the pages on which you want your new text. You can use Select All to mark everything. There's no "undo" on the Search and Replace so you'll want to be sure about your new text.
5. Click the Search & Replace button.

Like all XSite functions, your changes are "live" instantly.

XSites Desktop

As you continue to use your XSite's many tools to manage your business, logging into your XSite can become a daily process. And to help simplify that process, XSites Desktop brings access to many of your XSite's most powerful features to your desktop so you can manage your e-mail, shuffle through your contacts, or plan your marketing efforts while XSites Desktop monitors your XSite in the background.
Installing XSites Desktop

Before you can leverage the tools in XSites Desktop, there are a few things you must complete.

1. **Create a User Account** - XSites Desktop relies on your XSite user account for much of its operation so if you don't already have an XSite user account, have your XSite administrator create one for you. For exact details on this process, see the User Management section of this user's guide.


Once you successfully installed XSites Desktop on your computer, it automatically launches and prompts you to enter your XSite **Username** and **Password** to log into XSites Desktop for the first time.

1. Type your **Username** and **Password** into the boxes provided and click **Login**. After you supply your Username and Password, you never have to log into XSites Desktop again. When you start Windows it automatically starts itself in your Windows task tray.

2. To maximize XSites Desktop so that you can work with its built-in XSites tools, just double-click the a la mode icon in the lower right corner of your screen.

Configuring Your Account

XSites Desktop provides quick access to the details of your XSite user account so you can update your account information without even opening your XSite. Instead, you just open your XSites Desktop account configuration and make the changes there.

Switching User Accounts

If you need to log into XSites Desktop under a different user account than your default, you can easily switch profiles. To do so...

1. In XSites Desktop, click **Menu, Account Configuration**.

2. Click **Login as Other User**, enter your alternate username and password, and then click **OK** to switch accounts.
Updating Your Username and Password

While you can always log into your XSite to update your XSite username and password, you can also conveniently update it right from XSites Desktop.

1. In XSites Desktop, click Menu, Account Configuration.
2. Click Change Password.
3. Enter your Old Password in the field provided and then type in your new Username and Password.
4. Click OK to update your XSite with your new login information and update XSites Desktop at the same time.

Note: When you update your Username and Password in XSites Desktop, it updates your XSite with the new login information at the same time. After applying a login information change in XSites Desktop, remember to use the new Username and Password any time you log into your XSite directly in the future.

Changing Your Contact Information

To change your user account’s contact information through XSites Desktop...

1. In XSites Desktop, click Menu, Account Configuration.
2. Use the contact fields at the bottom of the screen to update your name, address, phone number, e-mail address, and any other contact information as necessary.
3. When finished, click OK to update your XSite user account with the new information.

Switching Between XSites

If you have multiple XSites you can easily switch between them using the drop-down menu at the bottom of XSites Desktop. To switch between your XSites...
1. Click the drop-down arrow at the bottom of the screen.

2. Choose the XSite to which you want to switch from the menu that appears.

XSites Desktop immediately logs you into your alternate XSite.

**Configuring RSS Feeds**

Using XSite Desktop's built-in RSS reader, you can easily keep in touch with all of the latest news in the industry. Simply put, RSS is a live news feed from a website of your choice and an RSS reader allows you to collect several news feeds into one continuous stream of news that you can monitor with ease. As each news site posts updates, your XSites Desktop RSS reader, fetches the new articles and flips through them so you can decide which ones you want to read. Before you can start watching inbound RSS feeds, you first need to find the RSS feeds you want to watch. While the notation for RSS varies from one website to the next, most sites denote their RSS feeds with an orange icon labeled "RSS" or "XML" that you can click to view the site’s RSS. Once you find an RSS feed, you can easily add it to XSites Desktop. To do so...

1. In XSites Desktop, click **Menu, Configure News**.
2. In the screen that appears, click **Add**.
3. Type or paste the RSS feed's address into the field provided and then click **OK** to add it to your subscription list.
4. Repeat this process for as many news feeds as you wish to add. If necessary, click an existing RSS feed and click **Edit** to update the address of the feed or click **Remove** to remove it from your subscription list.
5. Finally, use the drop-down menus to indicate how often you want XSites Desktop to check for new articles and how fast you want it to rotate through the day's articles.
6. When finished, click **OK** to save your changes.

XSites Desktop immediately starts monitoring each of your RSS subscriptions for new articles. As those new articles appear, XSites Desktop downloads them and rotates through them at the bottom of the XSites Desktop screen.

**Using XSites Desktop**

One of the most useful features of XSites Desktop is its one-click access tools that allow you to log into your XSite and jump to any major section of your site at the click of a button. Each of the one-click access buttons appears across the top of XSites Desktop and correlates directly to the icons available in your XSites administration area.

**Chat & Collaboration**

XSites Desktop's Collaborator plugin provides simple tools to help you share files with other real estate professionals and chat with people on your website in real time. Using XSites Desktop's Collaborator plugin you can:

- Chat with team members in your XSite
- Chat with other XSite owners throughout the nation
- Proactively chat with people on your website
- Request contact information from site visitors or direct them to key information in your site
- Share files with your colleagues
- And more...

To access XSites Desktop's Collaborator plugin, just open XSites Desktop.

**Enabling Chat**

By default, XSites Desktop Collaborator always allows you to communicate with other members of your XSite and other XSite owners, but you may also decide that you want to chat with people who visit your website in real time. By enabling the online chat portion of XSites Desktop Collaborator, you will always know when someone is visiting your website and can contact them directly through your chat tools or simply provide a way for them to initiate chat on their own. If you want to interact with your site visitors in this way, you first need to enable and configure the chat tools on your XSite. To do so...

1. From the **XSites Wizard**, click **Online Chat** in the **Extra Tools** pane on the left.
2. Check the **Enable Online Chat on My XSite** box.
3. From the **Style** options, select a chat picture to include on your website as an invitation to your visitors to chat.
4. Using the **Chat Available** and **Chat Not Available** text boxes, enter the messages you want to include on your chat picture to indicate whether someone is available for chat.
5. As necessary, apply bolding, italics, underlining, color, or font changes to your **Chat Available** and **Chat Not Available** labels by using the **Customize Text** tools.
6. From the **Color Options** section, select a pre-defined color arrangement from the drop-down menu provided or use the color selectors below to create your own custom color variation.
7. As necessary, upload your own personal photo for the chat prompt. Just check the Use Custom Image box in the Image section. Then, click Upload Custom Image to browse to and upload your photo. If necessary, you can remove it later by clicking Remove Custom Image.

8. Finally, select one of your custom forms from the drop-down box at the bottom of the screen. When you're not online and available to chat through your website, XSites will automatically redirect your site visitors to the form you select to request their information.

9. When finished, click Save to apply your changes and enable chat on your site.

Using Chat

XSites Desktop Collaborator works much like the other instant messenger clients available on the Internet, but with the added benefit that it's specifically targeted to help you interact with visitors on your website and with other associates in your team or throughout the industry. As other XSite users, friends in real estate, or site visitors become available online, XSites Desktop displays them in your contacts list. Those contacts are broken across three different sections as follows:

- **My Website Visitors** - This displays a list of guests that are currently on your site along with an indication of their geographical location. Multiple "guests" in this list mean multiple different visitors on your site. If the list is empty, there are no active visitors on your site.

- **My XSite Users** - Any other user accounts in your XSite are automatically added to this contact list. The colored balloon icon beside each contact's name indicates that contact's online status.

- **My Colleagues** - You can add any XSite user into your My Colleagues list. The colored balloon icon beside each contact's name indicates that contact's online status.

Conversations

To chat with any online contact in your chat list...

1. From XSites Desktop Collaborator, double-click the contact.

2. In the message window that appears, type a message you wish to send to the contact and click Send.

3. The contact receives an instant message with your message and can reply to it as necessary.

4. In addition to a continuing conversation, there are several other things you can do with your chat contacts:
   - Share files with other XSite owners
   - Request contact information from website visitors
   - Redirect a website visitor to another page in your website

5. When you're finished chatting/collaborating with the contact, just close the window to end the conversation.

Managing Chat Contacts

With XSites Desktop Collaborator you can maintain a "favorites" list of contacts with whom you want to chat. Any other users in your own XSite are added to XSites Desktop
Collaborator automatically, but you're free to add any other XSite owner into your chat favorites list or remove them from the list at any time.

**Note:** If you have multiple XSites, each XSite account has a separate set of chat contacts so you can keep your favorites list for each aspect of your business separate.

### Adding Contacts

To add another XSite user into your XSites Desktop favorites list...

1. From XSites Desktop Collaborator, click the **Add Colleague** button to the upper right of the contacts list.

2. In the screen that appears, enter the XSite user's website address and click **Lookup**.

3. A list of all users for that site appear in the box below. Select the contact you want to add into your contact list and click **Add Colleague**.

### Deleting Contacts

To remove a contact from your XSites Desktop Collaborator favorites list...

1. From XSites Desktop Collaborator, click **Menu**, **Collaborator**, **Delete Colleague** from the main menu.

2. In the confirmation screen that appears, click **Yes** to confirm that you want to delete the contact.

### Handling Contact Invitations

Just as you can invite others into your contact list, other XSites Desktop Collaborator users can invite you to their favorites list. If you click **Accept**, they're able to determine when you're available for chat and you can add them to your own contact list to do the same. If you click **Decline**, they will not be able to see when you are online or chat with you.

### Sharing Files

If you regularly have to collaborate with other associates, it's likely that you have to swap files periodically to make sure the whole group is in tune. Typically, that means sending files back and forth through e-mail, but that quickly clutters your Inbox and can mean that you'll have several
copies of the same file in your Inbox at varying stages in its lifetime. By moving that concept into XSites Desktop Collaborator, you can avoid those hassles by instantly sharing files with any online contact.

**Sending Files**

To share a file with a contact...

1. From XSites Desktop Collaborator, click to select the contact with whom you wish to share files.
2. Then, click the **Share Files** button to the upper right of the contacts list.
3. In the screen that appears, drag the files you want to share directly into the shared files box or click **Add File** and browse out to a file on your computer.
4. If the contact is online, the files you share are instantly sent to your contact. If the contact is offline, the file is saved until he/she next signs in and then the file is sent upon login.
5. Once you’ve shared files, they remain in-sync. If you edit the file, your contact receives the updates. If your contact edits the file, you receive the updates. You always have the latest copy of the file in your sharing folder.

**Receiving Files**

When someone shares a file with you, you’re immediately notified by a small notification that briefly appears in the lower right corner of your screen. From that point, you can open it, edit it, or delete it as necessary and XSites Desktop will automatically pass your changes through to your associate. To access files that have been shared...

1. From XSites Desktop Collaborator, click to select the contact who sent you the file.
2. Then, click the **Share Files** button to the upper right of the contacts list.
3. A list of shared files appears. Find and manage your file as necessary. You can edit, delete, or view it in the same ways you would inside a folder in Windows. When finished, click the **X** in the upper right corner of the screen to close the window.

**Deleting Files**

If you no longer need a file in your folder share, you can delete it to clear up space in your share. To do so...

1. From XSites Desktop Collaborator, click to select the contact with whom you wish to share files.
2. Then, click the **Share Files** button to the upper right of the contacts list.
3. Click to select the file you wish to delete.
4. Then, hit the **Delete** key on your keyboard and click **Yes** in confirmation that appears.
Changing Online Status

XSites Desktop Collaborator gives you the flexibility to remain online but "hide" from other XSites Desktop Collaborator users or website visitors when you need to keep "heads down." Of course, XSites Desktop automates status changes wherever appropriate, but you're free to change status as needed. To change your online status...

1. From XSites Desktop Collaborator, click the Status menu to the upper left of your contacts list.

2. From the drop-down that appears, select an appropriate online status. Status items include:
   - **Available** - If you want to appear online for other XSites Desktop users, but do not want to accept online chat requests from website visitors, select this status.
   - **Available to Web Visitors** - If you want to appear online both to XSites Desktop users and to website visitors, select this status.
   - **Busy** - If you want to appear online, but are currently working on other things, mark this option.
   - **Away** - Choose this status to indicate that you are online, but are going to leave your computer. As a convenience, XSites Desktop automatically selects this status for you when you're idle on your computer for more than 5 minutes. When you start working with your computer again, it restores your previous status.
   - **Appear Offline** - Choose this status to hide from all website visitors and other XSites Desktop users.

Chat requests will still come through to you, but other XSites Desktop users will be able to see your status and should be less likely to attempt to contact you.

Adding a Motto to Your Status

XSites Desktop lets you personalize your listing on the XSites Desktop chat network by adding a motto. If you want a short motto to appear to the right of your name in another XSite Desktop user's chat window...

1. From XSites Desktop Collaborator, click the Status menu to the upper left of your contacts list.
2. From the drop-down that appears, select **Change my status message**.

3. In the box provided, type a **Personal Status Message** and click **Save** to apply it to your chat listing.

   **Note:** This motto only appears to other XSites Desktop users. Web visitors will not see your motto.

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**Chatting with Visitors**

With XSites Desktop Collaborator you can easily talk with any visitor that drops by your website. Whenever a visitor appears on your site, a new **Guest** listing appears in XSites Desktop’s **My Web Visitors** list and the geographical location of the visitor is displayed to the right of that listing. Depending on your business model, you can either proactively contact the visitor to offer your help or simply sit back and wait for the visitor to contact you.

**Contacting Web Visitors**

If you want to proactively contact a web visitor...

1. From **XSites Desktop Collaborator**, double-click the **Guest** listing in the **My Website Visitors** section.

2. An offer of live assistance will appear on the visitor’s screen and prompt them to accept or decline the assistance. Wait for acknowledgement from the visitor. If the visitor accepts, a chat session begins. If the visitor declines, you receive notice and the chat session closes.

   **Note:** Depending on your visitors' browser settings, the chat window may open in a separate tab instead of a new window. This is a feature of many modern web browsers and beyond the control of a la mode.

3. Once a chat session has begun, you can message each other as much as necessary. In addition to basic messaging, though, you can also:
   - **Request the visitor’s contact information** - Since there's no way to determine visitor identities solely based off of their choice to visit your site, XSites Desktop Collaborator provides you with a basic tool to request this information from the visitor for future follow-up.
   - **Redirect the visitor to another page of your site** - As you chat with visitors on your site, questions may arise that are best answered by another page that is already on your site. For these situations, you can redirect visitors to the appropriate page on your site.

4. To end the chat session, simply close your chat window. If the visitor terminates the chat session, you’re notified and the Guest listing disappears from the **My Website Visitors** section.

**Web Visitors Contacting You**

If you’ve enabled the chat tools on your XSite, web visitors can contact you directly through your website. Here's how web visitors contact you.
1. A visitor clicks the chat icon on your XSite and types a message. When ready, the visitor hits **Enter** on the keyboard to submit the message to you.

2. If you are the only member of your XSite that is currently available for web visitor chat, the message pops up in XSites Desktop for you to address. If there are several team members from your XSite that are all accepting web visitor chat requests, the message from the visitor is sent in a "round-robin" fashion to the next available team member.

   **Note:** Depending on your visitors' browser settings, the chat window may open in a separate tab instead of a new window. This is a feature of many modern web browsers and beyond the control of a la mode.

3. Once a chat session has begun, you can message each other as much as necessary. In addition to basic messaging, though, you can also:
   
   - **Request the visitor's contact information** - Since there's no way to determine visitor identities solely based off of their choice to visit your site, XSites Desktop Collaborator provides you with a basic tool to request this information from the visitor for future follow-up.
   
   - **Redirect the visitor to another page of your site** - As you chat with visitors on your site, questions may arise that are best answered by another page that is already on your site. For these situations, you can redirect visitors to the appropriate page on your site.

4. If the visitor terminates the chat session, you're notified and the Guest listing disappears from the **Visitors** section. To end the chat session yourself, simply close your chat window.

### Requesting Contact Info

Currently, there's no automatic way to determine the identity of someone viewing your website. But given how valuable that information can be when "courting" a potential customer XSites Desktop Collaborator provides a simple tool you can use to request that information. To request contact information from a visitor on your site...

1. **From XSites Desktop Collaborator** start a chat session with the web visitor.

2. **Once an active chat session has begun, click Ask for Contact** at the top of the chat window.
3. A contact form appears on the visitor’s chat window with a **Save My Contact Info** button to submit the information. Wait for the visitor to automatically submit the contact information or type a short message directing him/her to fill out the form and click the **Save My Contact Info** button.

4. Once the visitor clicks **Save My Contact Info**, the info is submitted to you through the chat window. In addition, the contact information is also stored in your XSite's **contact manager** automatically.

**Redirecting Visitors**

Sometimes the easiest way to explain a topic to a website visitor is to simply direct the visitor to the pre-written answer on your site. To redirect a visitor to another page on your XSite...

1. From **XSites Desktop Collaborator**, start a chat session with the web visitor.

2. Once an active chat session has begun, click **Remote Control** at the top of the chat window.

3. From the pop-up that appears, select a **Content Page** from the provided menu. Only content pages you selected in the **My Content** step of the Wizard are available for redirect.

4. Finally, click **Redirect** to send the guest to the selected page of your site.

**Note:** If your site visitor closes your website at any time during the chat process, chat will still continue, but you will lose the ability to redirect them to another page of your site in this way. As an alternative, you can still send them the link to the page of your site by typing it into the chat window.

**Creating Web Pages**

In addition to the wealth of provided content pages that come with your XSite, you can also create your own custom pages and even edit the provided content so that it's tailored to your business. To create or edit a page of your XSite...

1. From the **My Office** screen, click the **XSites Wizard** button.

2. Click **My Content** in the **Content** pane on the left.

3. You can either create a new page on your site or edit one of the existing pages.
   - **To create a new page** - Click the **Custom** tab and then click the **Add New Page** button near the bottom.
   - **To edit an existing page** - Click the page's title to open it for editing.

4. In the editor, enter or update the information in each of the four sections. Sections include:
   - **Page Information** - Name your page and give it a web address.
   - **Page Content** - Edit the wording and content of your page. You can either create the page from scratch or copy and paste it from an existing source.
Other Page Options - Add Dynamic content, a Lead Generation form, a Client Data Capture form, or an RSS/ATOM news feed to the page to engage your visitors.

Search Engine Tools - Optimize your page for search engines.

5. Click Save when your page is complete.

6. In the list of pages in My Content, check the box next to your page to turn it on and then click Save.

Naming the Page

Each page of your website must have its own unique name and web address. These two items help your visitors get to the page either by clicking a labeled button (Button Name) or by directly accessing the page via a link (Web Address). For best results, keep both the Button Name and Web Address short, simple, and as similar as possible. Remember, though, that web addresses cannot contain punctuation or spaces. To name (or rename) a page of your site...

1. Open the page you wish to edit in the page editor.

2. In the top section, type a Button Name and Web Address into the provided fields.

   - Button Name - Enter the text you’d like to have appear on the button in your site’s navigation menus.

   - Web Address - Type the rest of the web address (or DOT COM) that you want to use for the page. The link you create can be used to directly access this page on your site in case you’d like to use the link in your other marketing efforts.

3. If desired, write any custom content you want in your page.

4. If desired, add any dynamic content tools, contact forms, or RSS/ATOM feeds to your page.

5. Tweak your search engine settings for the page.

6. When finished, click Save and Close to save the page. Then, be sure to check the page and click Save in the My Content step to active the page on your website.

Other Languages

Just as you can edit the content of each page in your site in any of the languages your site supports, you can also define custom web addresses and button names for your page in each of those languages. Once you’ve defined your Button Name and Web Address in English (and saved the page), you can change those items in other languages by editing the page, selecting the language you wish to edit from the options below the Button Name field, creating the Button Name and Web Address in that language, and saving the page.

Adding Custom Content

Custom content is a vital part of a successful real estate website. In addition to its benefit to your search engine marketing efforts, custom content tends to have a more significant impact on your site visitors as well since it is more pertinent to your business and, ideally, also more
pertinent to their real estate problems. To add custom content to your site...

1. Open the page you wish to edit in the page editor.

2. Be sure to name the page if you have not already done so.

3. Scroll down to the Page Content section of the editor and select the appropriate language from the drop-down menu to the upper left.

4. Then, use the tools in the Content Editor to create your custom page content. Here are some keys to successful page content.

   o **Avoid talking about yourself or your company** - Instead of using words like "me," "my," "I," "we," "our," and "us," talk to your customers. Use the words "you" and "your" frequently. The one page of your site where you can AND should talk about yourself and your company is in your staff directory or an About Us page.

   o **Talk about your target customers' problems and your solutions** - Try to relate what you say back to its significance to your target customer. This forces you to think of and provide good reasons for someone to contact you once they get to your site. By doing this, you also prove that you understand your customers' needs and concerns.

   o **Reword any provided content** - While the stock content provided with XSites is good, it lacks certain specifics about your business that only you can add. Whenever you use a page of our stock content on your site, first comb through it and reword it to include specifics about your business and your language style. Not only will this dramatically improve your search engine exposure, but it also tends to improve your lead generation efforts.

   o **For "entry" pages on your site, be sure to work in some keywords** - If the page you're editing is one you intend to use as a marketing tool (to be found in search engines), read through the page and look for places where you can substitute words or sentences with keywords or phrases that someone might use to find you online. This improves your search engine rank and as long as you use these keywords and phrases naturally in the page (avoiding long lists of words), you can expect a better return for your time invested.

   o **Focus your page** - Each page should have a clear purpose whether it is to lead your visitors deeper into your site, educate them, or prompt them to contact you. If you can't identify the purpose of the page on your site, it's probably best that you don't offer it. In the pages that you do offer, remember to keep each page "laser-focused." Diverging into too many different topics in one page makes it more difficult for your visitors to identify the purpose of the page or what you want them to do.

   o **Include a call to action** - Once you know the purpose of a page on your site, you can include a "call-to-action." In other words, once you know what purpose the page fills, you know what you can ask your visitor to do. For instance, in a page written to first time home buyers, you might offer a way for them to sign up for tips or a report on buying your first home. Just be sure that the call-to-action is very specific. Rather than something like "contact me,"
5. If desired, add any dynamic content tools, contact forms, or RSS/ATOM feeds to your page.

6. Tweak your search engine settings for the page.

7. When finished, click **Save and Close** to save the page. Then, be sure to check the page and click **Save** in the My Content step to activate the page on your website.

### Search Engine Optimization

Search Engine Optimization, or SEO, is the process of altering your web pages to comply with the factors that major search engines consider when they rank your website. While your XSite comes complete with an entire set of Search Engine Tools to help you influence your SEO rank positively, some of the most useful tools are those provided inside each individual page of your site. To optimize a page of your site for search engines...

1. With the page you wish to edit **open in the page editor**.

2. Be sure to **name the page** if you have not already done so.

3. Rewrite the body of the page so that it relates to your business. As you rewrite the page, keep these items in mind.
   - If at all possible, include phrases you expect your customers to use as "keywords" when they search for your services.
   - Avoid using our stock content without significant changes that tie it more closely to your business.
   - Avoid writing as if you're trying to influence search engine rankings. In particular, long lists of words that are beyond what you might call "practical" for a human to read in your page are a form of **keyword stuffing** and can have **drastically** negative effects on your search engine rank.

4. If desired, add any dynamic content tools, contact forms, or RSS/ATOM feeds to your page.

5. In the **Search Engine Tools** section at the bottom of the page, update each of the following items:
   - **Page Title** - The page title appears at the very top of your visitors' web browser (not as part of your website) to explain the content of the page. Since it is also what virtually all search engine use as the title for your search listing, make sure it's short, to-the-point, and relevant to the content of the page on your site (**NOT** your whole business or website. **JUST** to the single page you're editing). Since most real estate services are also local, including one or two of the most well known cities or counties you service is also a good idea.
   - **Page Keywords** - Your page keywords influence the phrases that someone can search for inside of a search engine to find you. Today, they hold FAR less significance than in the earlier years of the Internet and you should not spend too much time or effort altering them. Just put a few search phrases that you expect someone might use to find the page you're editing (**NOT** your whole business or website. **JUST** this page of your site). Try not to exceed 3 or 4 lines of keywords in the editor as most search engines will actually penalize you for
putting too many keywords into your site (Keyword Stuffing).

- Page Description - The page description is another significant contributing factor to your page rank. For many search engines, it's also what your visitors will see listed below your page title in a list of search results. The most important thing to make clear in your page description is what you do and where you do it as it pertains to JUST this page of your site (NOT your whole business or website).

6. Check the boxes to the right side of the Search Engine Tools section to tell search engines about the existence of the page. Options include:

  - Submit your page to search engines - Actively submit the page to search engines. DO NOT do this more than once. Most modern search engines penalize you for repeatedly "submitting" your site pages in this manner.

  - Add this to your Google/Yahoo Site Map - Google and Yahoo both use "sitemaps" the modern form of "submitting" a page to search engines. Think of this as a "don't call us, we'll call you" approach to submitting your site to search engines. It IS something you should do for all important pages of your site once you've activated your Google Sitemap and Yahoo Sitemap.

  - Add this page to XSites Site Map - The XSites sitemap is a generic form of a Google/Yahoo sitemap that all search engines can read. It IS something you should check for all important pages of your site.

  - Create a link to this page in your XSite Footer - Add a convenient link to this page to the footer of your website. While this IS something you should do for the MOST important pages of your site, it is NOT something you should do for more than around 10 pages. It does have an impact on your search engine ranking, but too many pages (more than 10) in the footer can also make it more complicated for a human to use your site.

7. When finished, click Save and Close to save the page.

Then, be sure to check the page and click Save in the My Content step to active the page on your website.

Additional Search Engine Resources

Search Engine Optimization is much more of an art form than a science. If you want to learn more about how to optimize your website for search engines, the following resources.

- Our search engine resources site
- The Driving Traffic recorded webinar

Embedding Dynamic Content

Once of the best ways to encourage your visitors to contact you is to offer them relevant information and engaging content. To help you with this, XSites include a set of built-in "Dynamic Content" items you can add to the right side of any page in your site. And if desired, you can even create your own custom "Dynamic Content" in that same right hand sidebar. To add Dynamic Content to any page in your site...
1. Open the page on which you would like to add Dynamic Content.
2. Scroll down to the Other Content Options section and check the Include Dynamic Content box.
3. Click the Customize button that appears to the right of the Include Dynamic Content box.
4. A new window appears and shows you a list of the available dynamic tools. To include any dynamic tool, just check the box beside each tool that you want. You can also click the tab for each item to adjust each tool's settings. For a brief overview of all of the available tools, see the Dynamic Content Options section below.
5. Once you've selected all the tools you need, scroll down and click Customize Positioning to reorder their order of appearance in the page from top to bottom. In the window that appears, click and drag any element to place it in the list. Then, click Save.
6. Click Save Changes to add these Dynamic Content options to your page.

Dynamic Content Options

- **Foreclosure Listings** - Our partnership with foreclosure.com allows you to offer your visitors access to preforeclosure, foreclosure, bankruptcy, For Sale By Owner (FSBO) and tax lien listings right on your site. All you have to do to provide search tools on your site that integrate directly with foreclosure.com is enable them on your site and you can start generating leads from those prospects interested in foreclosures. Check this box to enable the foreclosure.com integration on this page and check Include Clickable Map if you'd like to add a map of the US that your visitors can click to search for foreclosures in addition to the standard search options.

- **News Feed** - Add the latest real estate news headlines to your XSite. Choose one of the pre-provided news feeds or use your own custom feed. RSS, or news, feeds are live streams of news from an online news site or magazine. Most online news and magazine sites provide them free of charge. If you prefer to use a custom RSS (news) feed, choose the Enter Custom RSS Feed URL option, type a Feed Description and Feed URL, and be sure to leave a Copyright Notice at the bottom to clarify that the content is from another provider.

- **Mortgage Calculator** - Allow visitors to calculate a monthly payment amount, based on loan amount, interest rate and term of the loan.

- **Mobile Notification** - Visitors can send a text message straight to your cellular phone or mobile device by simply filling out the form supplied by this tool. Of
course, you must have Text Messaging with your cellular service provider or e-mail on your mobile device to utilize this tool.

1. For this tool to work, select the user account to which you want to route any contact information from the drop-down list.
2. Check the box to create an automatic response. This is sent to the visitor's e-mail account immediately.
3. Click one of the icons to select the visual look you'd like to use.

- **Lead Capture Forms** - Use this tool to place a button leading to any of your Lead Generation Forms in the Dynamic Content. When visitors click this button, the form opens in a new window.
  1. Check the box for the forms you'd like to use. After you select a box, an image of the button appears. Click this to preview your form.
  2. For each selected item, activate and edit the Auto Response item, if desired.

- **National Rates** - Displays the current 30-year fixed, 15-year fixed and 1-year adjustable interest rates from Freddie Mac, updated daily.

- **Custom Content** - This option can be used to create any additional Dynamic Content items you wish. You can use this to add simple text messages. Or, if you have a greater knowledge of web development languages, you can create your own custom buttons, graphics and other tools.
  1. The content window is a mini-version of our complete Content Editor. Click the Show Editing Toolbar button to pop up the useful toolbars.
  2. At the bottom of the window, click the \( \text{icon to switch to the native HTML mode.} \)

- **Important Links** - This option allows you to include links to specific pages on your XSite, or to other sites, in the Dynamic Content.
  1. Click the **Related Links** text and replace it with a different header, if desired.
  2. To the right of the **New Link**, use the **Click Here** link to create a new item. Give it a **Link Name** and then select whether you'd like it to point to a page on your XSite (A site page), or an external web site (a custom URL). For internal links, just select the page from the drop down list. For external links, type the complete URL for that site (i.e. www.baytownproperties.biz).
  3. External links open in a new window, while internal links open in the existing window.
  4. Use the buttons at the bottom to switch between a **Tree View** for your links, and a **Simple Bulleted list**.

**Embedding Contact Forms**

Effective websites always provide an easy way for a visitor to make contact. Whether it's a simple contact form, "Got a Question?" form, or some kind of enticing offer, you can accomplish this easily by embedding contact forms into the pages of your site. To add a contact form to your site...

1. In the **My Content** step of the XSite Wizard, find and click the page you wish to edit.
2. When the Content Editor appears, scroll down the page to the Other Content Options section below the main editor.

3. Check the Client Data Capture Form box.

4. Click Customize to the right of the Client Data Capture Form check box.

5. Select any of the forms that you created from the first drop-down list.

6. If you want your form to attach an auto-responder to your form, check the Automatically respond box and click Customize below it to customize your response.

7. Type a message and/or signature line into the box provided or choose a previously written auto-responder template from the drop-down menu. If you write a new auto-responder that you want to use amongst several forms on your site, click Save response as a template to add it to your auto-responder template list.

8. Then, indicate whether you want to use a custom signature line that you've type into the message box or whether you want your XSite to attach one when the message is sent. If you want your XSite to attach a signature automatically on your behalf, indicate which contact information you'd like to include by checking the boxes beside each type of contact information you want.

9. Click Save and Activate to save and enable your auto-responder.
10. Once you've returned to the lead capture form options, pick the Contact Group in which you'd like to place the contact information from respondents.

11. When finished, click Save to add your form to the page.

Embedding RSS/ATOM Feeds

Simply put, RSS (and ATOM, the competing format) is a means by which news sites and other content publishers can offer live feeds to their latest articles and posts. Subscribers can then configure their website or an "RSS reader" to point to these files using a simple website address (i.e. http://rss.news.yahoo.com/rss/topstories) and any new articles will show up in their RSS reader as they are published. XSites include a designated RSS Feeds feature that makes it a snap to include any RSS Feed on any XSite page.

**Hint**: All you need to link your site with an RSS Feed is the URL for the RSS file. If the specific URL is not listed, look for an XML, RSS, or ATOM button on the publisher’s website. In many cases, you can spot this icon on their sites by looking for an orange icon that's often accompanied with a symbol that resembles a broadcast. Right-click this image and choose Copy Shortcut. You can then paste that URL into the RSS Feed box on your XSite.

Once you've added an RSS feed to a page of your site, your visitors will see the latest news articles from that feed on that page automatically as they return to your site over and over again. For more detailed information about RSS and its value in driving traffic to your XSite, see Tech Doc 7008.

Adding the Feed

To embed an RSS/ATOM feed in a page of your website...

1. In the My Content step of the XSite Wizard, find and click the page you wish to edit.

2. Scroll down the page to the Other Page Options section below the main editor.

3. Check the RSS Feeds box.

4. Click Customize to the right of the RSS Feeds box.

5. Type a name for the RSS feeds section of your page into the box provided. Then, click Add Feed.

6. Type or paste the URL to the RSS feed into the provided box and then click Save to add the feed into your page.

7. Repeat steps 5 and 6 until you have added all of the RSS feeds you want into your page.

8. Click Save to add your feeds into the page and then click Save Changes in the Content Editor to update the page.

Your RSS feeds are immediately available on your page.

Removing a Feed

To remove an existing RSS/ATOM feed from a page of your site...

1. In the My Content step of the XSites Wizard, click the page containing the RSS feed you wish to remove.
2. Scroll down to the Other Page Options section of the Content Editor and click the Customize button beside the RSS Feeds check box.

3. Click the Delete link beside each feed you want to remove from your page.

4. When finished, click Save in the RSS Feeds editor and then click Save Changes in the Content Editor to update your page.

Linking to Other Websites

While you can always link to another website from the content of any page in your site, sometimes it’s necessary to have an entire button in your site’s navigation menus that just links to another website. To create a button that links to another website in your site's navigation...

1. From the My Content step of the XSites Wizard, click the Custom tab.

2. Click the Link to External Page button to the bottom right of the tabs.

3. Name the page/button.

4. Type the URL (web address) for the website with which you want to link.

**Hint:** You can copy the URL from the Address bar of your web browser with the page open by highlighting the entire entry after the http:// portion of the URL, and then selecting Edit on the menu bar and choosing Copy. Once you have copied the URL, right-click in the URL field of the Content Editor window and select Paste from the menu that appears.

5.

6. Choose from the available options described below to determine how this website will open the external website. You have several options to choose from when linking to external web pages from your XSite. These include the following:

   o **Open in Current Window** replaces your entire XSite "shell" with the contents of the new page.
   
   o **Open in a New Window** launches a new browser window and puts your XSite in the background.
   
   o **Open in a Frame** keeps your header and colors, but loads the content below it.
   
   o **Open in an iFrame** keeps your XSite header and navigation panes and loads the content in a small, scrollable window.

7. Tweak your search engine settings for the page.

8. Click Save and Close when finished to save the page. Then, be sure to check the page and click Save in the My Content step to active the button on your website.

Creating a Staff Directory

To build a staff directory you can publish on your site...

1. Create user accounts for each staff member in your site’s User Manager. Remember to check the Show this User Info on My Staff Profiles Content Page and Display This User’s Address Information with Their Profile boxes as you fill out the user account.

2. Visit the My Content step of the XSites Wizard and click the Staff Profiles page in the Provided tab to edit it.
3. In the window that appears, type a name for your staff directory. By default, it's named "Staff Profiles," but you can title it however you wish.

4. Scroll down to the list of the users you chose to include in your staff directory and use the up and down arrows to control the order of the staff profiles in your directory. To hide any of the profiles from the directory, just uncheck the box beside it.

5. In the main content area of the page editor, type a company profile that will appear by default when someone accesses your staff directory.

6. When you're done arranging your staff directory, click Save to apply your changes and be sure to check the box for your staff directory page so that it appears on your website.

Password Protecting Pages

If you ever need to provide a page on your XSite to one specific client or need to keep a page of your site closed off to the general public, you can easily password protect the page to ensure that only people you authorize can access that page. To do so...

1. In the My Content step of the XSites Wizard, find the page you want to password protect.

2. Click the lock icon to the right of the page.

   o Gray locks indicate that the page is not yet password protected and is available for password protection.

   o Yellow locks indicate that the page is currently password protected, but you can still change the password applied to it.

3. Then, type the desired password into the box provided and click Submit.

Now, the desired page is locked by a password. Whenever someone attempts to view the page, they're prompted for the password. If they do not have the password, they're provided with a way to request it from you. When you receive their request by e-mail, you can simply reply to them with the password if you want to give them access.

Editing & Removing Passwords

If you ever need to change or remove a password from any page of your site, you can do so just as easily.

1. In the My Content step of the XSites Wizard, find the page you want to password protect.

2. Click the yellow lock icon to the right of the page.

3. In the box that appears, do one of the following:
   
   o To change the password, type the new password into the provided box and click Submit to apply it.

   o To remove the password, click Remove Password.

The Content Editor

To edit the content pages of your site, your site footer, or many other tools, the same Content Editor is used. The Content Editor is basically a word processor, where you can enter, lay out and format any content you'd like to appear on your website. As with any word processor, you'll find tools to cut, copy, paste, change fonts, insert pictures, lay out tables, create hyperlinks, and many other features.

To open a web page in the Content Editor...
1. Log into your XSite and click **XSites Wizard** in the **My Office** area.

2. When the XSite Wizard loads, click the **My Content** button in the Content pane on the left.

3. In the list of pages that appears, find the page you wish to edit. Remember that there are several tabs that list different types of pages.

4. Click the name of the page or the pencil icon to open that page in the Content Editor.

**Content Editor Orientation**

Here are some items to keep in mind as you’re editing your content:

- At any time, you can revert to the pre-written content supplied with your XSite by clicking the **Revert** button.
- To start from a clean slate, click the **Blank Page** button.
- Above the text editor are rows of buttons, each with its own function. These are very similar to the buttons found in most popular word processors. To learn what a certain button does, just hover your mouse over it, or click here for a description of each tool.

- While HTML is designed to be a tool-independent language, the reality is that many web content tools (including Microsoft Word) use codes and formatting that can cause undesired results when pasted into your HTML ads or pages. Fortunately, your site comes equipped with functions specifically designed to help you paste in content from other applications with minimal formatting conflicts. Look for the special buttons in the tool bars to use these features.

- The top toolbar at the bottom of the screen allows you to change the current view of the page to full screen, view or edit the raw HTML, change the zoom level of the page, spell check it, review the word count etc.

- The bottom two toolbars at the bottom of the screen present you with an overview of the selected HTML element’s properties and a HTML element tree. If you’re not altogether familiar with HTML editing, you may at least find that you do not have to right-click to change the properties of an image or other item as often since they appear at the bottom of the screen. If you’re an HTML guru, you may be familiar with both of these tools as they are excellent ways to quickly edit HTML in WYSIWYG (what-you-see-is-what-you-get) mode.

- If you’re editing one of your XSite’s content pages, and have enabled the multilingual features of your XSites,
the drop-down menu in the upper left allows you to select which language you're going to edit.

- Likewise, for XSite content pages, you can choose a "template" for the page by selecting one from the Pre-written content drop-down menu. Several of our provided pages have a choice of pre-defined layouts and text to choose from.

**Editor Views**

The editor toolbar normally located at the bottom of the page includes five buttons that allow you to change the current view of the page.

- **Design mode** - This is the default view, allowing you to modify your content and use any of the editor's tools.

- **HTML mode** - This switches the display to show you the raw, HTML code that makes up your page content and design. If you're familiar with HTML programming, this can give you an additional level of control over the appearance of your page and how it functions.

  - **Preview mode** - If you want to see how your page will appear on the internet, click this button. In this mode you cannot edit any of the text or other elements.

  - **Full Screen mode** - While in Design Mode, if you feel a bit constrained and would like to have a more space on-screen to edit your page, click this button (located to the right)

  - **Show/Hide Border** - Shows or hides borders around tables in the content area.

  - **Zoom Level** - While in Design Mode, you can adjust your display to show more of the page at once, or have it zoom in to show more detail. Click the drop down menu and select the desired zoom level.

  - **Module Manager** - Activates /Deactivates modules from a drop-down list of available modules. Turning off some of the modules will give you a bit more screen space in which to edit your content.

  - **Toggle Docking** - Docks all floating toolbars to their respective docking areas.

**Button Help**

All of the toolbars in the editor can be positioned at either the top, bottom, right or left side of the screen, or it can be "floated" on top of your text. Just click on the end any
toolbar (looks like 4 dots) and drag it to the desired position.

GENERAL BUTTONS

- Spell button - Launches the spellchecker.
- Print button - Prints the contents of the editor or the whole web page.
- Find and Replace - Find (and replaces) text in the editor's content area.
- Cut button - Cuts the selected content and copies it to the clipboard.
- Copy button - Copies the selected content to the clipboard.
- Paste button - Pastes the copied content from the clipboard into the editor.
- Paste from Word button - Pastes content copied from Word and removes the web-unfriendly tags.
- Paste Plain Text button - Pastes plain text (no formatting) into the editor.
- Paste as HTML button - Pastes HTML code in the content area and keeps all the HTML tags.

- Undo button - Undoes the last action.
- Redo button - Redoes/Repeats the last action, which has been undone.

FORMAT BUTTONS

- Bold button - Applies bold formatting to selected text.
- Italic button - Applies italic formatting to selected text.
- Underline button - Applies underline formatting to selected text.
- Strikethrough button - Applies strikethrough formatting to selected text.
- Align Left button - Aligns the selected paragraph to the left.
- Center button - Aligns the selected paragraph to the center.
- Align Right button - Aligns the selected paragraph to the right.
- Justify button - Justifies the
selected paragraph.

Outdent button - Indents paragraphs to the left.

Indent button - Indents paragraphs to the right.

Numbered List button - Creates a numbered list from the selection.

Bulleted List button - Creates a bulleted list from the selection.

Superscript button - Makes a text superscript.

Subscript button - Makes a text subscript.

Insert New Paragraph button - Inserts new paragraph.

Text Color (foreground) button - Changes the foreground color of the selected text.

Text Color (background) button - Changes the background color of the selected text.

Font Select button - Sets the font typeface.

Font Size button - Sets the font size.

CSS Class

Custom Styles dropdown - Applies custom, predefined styles to the selected text.

Custom Links dropdown - Inserts a link to any content page from your XSite.

Paragraph Style Drop-down button - Applies standard text styles to selected text.

Format Stripper button - Removes custom or all formatting from selected text.

OTHER BUTTONS

Convert the text of the current selection to upper case, preserving the non-text elements such as images and tables.

Convert the text of the current selection to lower case, preserving the non-text elements such as images and tables.

Insert Table button - Inserts a table.

Insert horizontal line button - Inserts a horizontal line at the cursor position.
Insert Special Character dropdown - Inserts a special character (€®, ©, ±, etc.)

Insert Date button - Inserts current date.

Insert Time button - Inserts current time.

INSERT CONTENT

Image Manager button - Inserts an image from a predefined image folder(s).

Flash Manager button - Inserts a Flash animation and lets you set its properties.

Windows Media Manager button - Inserts a Windows media object (AVI, MPEG, WAV, etc.) and lets you set its properties.

Document Manager - Inserts a link to a document on the server (PDF, DOC, etc.)

Hyperlink Manager button - Makes the selected text or image a hyperlink.

Remove Hyperlink button - Removes the hyperlink from the selected text or image.

Help - Launches Help content.

VIEW BUTTONS

Design button - Switches the editor into Design Mode.

HTML button - Switches the editor into HTML Mode.

Preview button - Switches the editor into Preview Mode.

Toggle Screen Mode - Switches the editor into Full Screen Mode.

Show/Hide Border - Shows or hides borders around tables in the content area.

Zoom - Changes the level of text magnification.

Toggle Docking - Docks all floating toolbars to their respective docking areas.

Repeat Last Command - A short-cut to repeat the last action performed.

OTHER KEYBOARD SHORTCUTS

Selects all text, images and tables in the editor.

Ctrl+A
- Finds a string of text or numbers in the page. Ctrl+F
- Closes the active window. Ctrl+W
- Closes the active application. Ctrl+F4

**Note:** While this feature uses Cascading Style Sheets (CSS), you are currently limited to the styles included with the editor.

**Formatting Text**

In the Content Editor, text can be edited as you would in a word processor. Just begin typing, and use the formatting buttons found in the toolbars to enhance your text. For help with any of the buttons, just hover your mouse over it and a description appears. Or consult the Button Help page of this guide.

- To modify text you’ve already typed, first select it and then click any of the buttons to apply the format to that text.
- To insert "special characters (such as © or ¾), click the button that looks like the copyright symbol. Then, select the desired symbol from the list.
- The font list pull down menu is limited to certain standard "web" fonts that the vast majority of internet users have installed by default on their systems. This keeps you from using a font that would not display properly on a computer that doesn’t have a particular font installed.
- The editor also comes equipped with a few custom paragraph and text styles that you can apply to your content. Just select the desired text and choose a format from the drop-down list.

**Find & Replace**

The Content Editor has its own, built-in Find and Replace feature that lets you change any content within a specific page. This should not be confused with the site-wide Search and Replace feature found in the XSites Wizard.

- In the Content Editor, click the Find and Replace icon in the toolbar.
- To Find certain text on your page, click the Find tab and then type the desired text in the File text box. Choose your Search Options and then click OK.

![Find And Replace](image)

- To Replace certain text on your page with different text, click the Replace tab. Type the original text in the
**Inspector XSites User’s Guide**

**Find** text box and then the new text in the Replace with box. Set your **Search Options** and then click:

- **Find Next** to locate the next instance of the original text. Once found, click **Replace** to replace it.
- **Replace** to find and replace the first instance of the text.
- **Replace All** to search the entire document and replace all instances of the text with the new item.
- **OK** to accept your changes.
- **Cancel** to terminate the process and undo your changes.

**Hint**: The Find and Replace feature is particularly powerful when used in the **HTML view** of your content. While the toolbar is not visible in this mode, you can press **Ctrl + F** to bring up the tool.

### Creating Hyperlinks

Hyperlinks are a great way to give readers a place to find additional information. Using your site's Hyperlink Manager, you can add a link into an image or text that's already in your page or just insert a new link (text and all) into your page.

There are several types of hyperlinks that you can add to your page's content, including:

- Links to other pages in your site
- Links to other web pages
- Links to files in your File Library
- Links to anchors you've placed in a page
- Links to an e-mail address

**Note**: This section shows you how to create links within your content. If, instead, you want to create a button in your XSite's menus that links to an external web page or other content, see the **Creating Links to Other Websites** section of this guide.

### Linking to Other XSite Pages

If you need to add or create a hyperlink in your web page to another page in your website, you can do so via the **Custom Links** drop-down menu in the Content Editor.

1. In the **Content Editor**, select the text (or image) you want the user to click.
2. Click the **Custom Links** drop-down menu in the main toolbar.
3. Click **My Selected Content** to expand the list of active pages on your site

-OR-

Click **Non Selected Content** to expand the list of content pages available on your site, but that are currently inactive.

4. Browse the list of available pages to find the page to which you want to link. When you find that page, click it to insert the hyperlink into your page, text, or image.
Note: If you do not select text or an image in your page, the XSite Custom Links menu simply inserts the name of the page you want to link to as the hyperlink text in your page.

**Linking to Other Web Pages**

Linking to other pages outside of your website is simple with your site's Hyperlink Manager.

Note: This process creates a link within your content. If, instead, you want to create a button in your XSite's menus that links to an external web page, see the Creating Links to Other Websites section of this guide.

1. In the **Content Editor**, place your cursor where you'd like to insert the link. Alternately, if you want to turn some existing text or an image into a hyperlink, select the text (or image) you want the user to click.

2. Click the **Hyperlink Manager** icon (the one that looks like a globe with two enclosed chain links).

3. In the screen that appears, type or paste the URL (web address) of the page to which you wish to link into the **URL** field.

4. If you did not select text or an image in your page to turn into a link in the previous steps, type some text to use as the clickable link into the **Link Text** box. If you type nothing into the Link Text box, the **Hyperlink Manager** simply inserts the URL (web address) into your page as a link.

5. Choose a type of link to insert. In most cases, the default option of **http://** will suffice. All other options available are more advanced and require some knowledge of website technology.

6. Choose a **Target** from the drop-down menu provided. Options are:
   - **New Window** - Opens the web page in a new window
   - **Same Window** - Opens the web page in the main window
   - **Frame** - Opens the web page in a frame - keeping just your site header intact.
   - **IFrame** - Opens the web page in a frame - keeping just your site header and side navigation intact.

   Hint: If you're linking to another website, it's usually best to avoid opening the link in the Same Window. By doing so, your website disappears and is replaced with the site to which you've linked. This frequently means that you lost your customer to that site.

7. Finally, type a brief description of the link into the **Tooltip** field. This description then pops up whenever someone hovers the cursor over the link and provides search engines with one other piece of information they can use to rank your site.

8. Click **OK** to add your link to the page.
Linking to Documents

Your File Library can contain any kind of document you desire, including images, word processor documents, spreadsheets, PDF documents and more. You can then provide links to these documents in any of your site's content pages so your clients can easily download them. To add a link to a document in your file library, you must first upload it from either the File Library function, or from the Content Editor's File Manager. To insert a link to a document...

1. In the Content Editor, place your cursor where you'd like to insert the link to the document. Alternately, if you want to turn some existing text or an image into a link to a document, select the text (or image) you want the user to click.

2. Click the Document Manager icon (the one that looks like a globe with two enclosed chain links).

3. In the screen that appears, select the desired document from your File Library, or click on the Upload Document tab to upload a new one.

4. Type a brief description of the document into the Tooltip field. This description then pops up whenever someone hovers the cursor over the link and provides search engines with one other piece of information they can use to rank your site.

5. Finally, choose a Target from the drop-down menu provided. Options are:
   - New Window - Opens the web page in a new window
   - Same Window - Opens the web page in the main window
   - Frame - Opens the web page in a frame - keeping just your site header intact.
   - IFrame - Opens the web page in a frame - keeping just your site header and side navigation intact.

6. When finished, click Insert to place the link to your document into your web page.

Linking to Page Anchors

Page anchors are electronic bookmarks within a page. If you have a web page divided into sections, you can provide a menu at the top of the page containing links to each section. Now, your site visitors won't have to scroll down the entire page to get to the sections drawing their interest.

Adding links to page anchors in your web page is a two step process:

- First, insert the page anchors or bookmarks on your page.
- Next, create links to these anchors from another location in your page (like the top).
Inserting Page Anchors

1. Place your cursor where you want the page anchor to reside on your page and then click the **Hyperlink Manager** icon (the one that looks like a globe with two enclosed chain links).

2. In the screen that appears, click the **Anchor** tab and type a name for the anchor you're inserting. If, for instance, you placed this anchor at the top of the page, you might name it "Top." Just make sure to give it a meaningful name.

3. Finally, click **OK** to insert the anchor into your page.

While nothing may appear to happen in your page, an anchor is created and added to the list of available anchors so that you can link to it.

Linking to Page Anchor

1. In the **Content Editor**, place your cursor where you'd like to insert the link. Alternately, if you want to turn some existing text or an image into a hyperlink, select the text (or image) you want the user to click.

2. Click the **Hyperlink Manager** icon (the one that looks like a globe with two enclosed chain links).

3. Find the anchor you created in the **Existing Anchor** drop-down menu and click to select it.

4. Finally, type some **Link Text** into the available field if it is not already filled out and type a description of this link into the **Tooltip** field to give your viewers a better understanding of what will happen when they click the link.

   **Note:** If you leave the **Link Text** field blank, the anchor name is inserted into the page as the Link Text.

5. Click **OK** to insert your anchor link.

Linking to E-mail Addresses

Inserting a link to an e-mail address makes it quick and easy for your site visitors to communicate with you. When viewers click the link, their default e-mail program appears, opens a new e-mail message and inserts the e-mail address you specify into the To line. To add a link to an e-mail address into your web page...

1. In the **Content Editor**, place your cursor where you'd like to insert the link. Alternately, if you want to turn some existing text or an image into a hyperlink, select the text (or image) you want the user to click.

   **Hint:** While rare, it is possible that some people won't have their system configured properly to take advantage of these links. Therefore, we recommend using your actual e-mail address as the link text. That way, even if viewers don't have their system configured,
they can still see your address and e-mail you manually.

2. Click the **Hyperlink Manager** icon (the one that looks like a globe with two enclosed chain links).

3. In the screen that appears, click the **E-mail** tab.

![Hyperlink Manager](image)

4. Type the destination e-mail address in the **Address** field and, if necessary, some **Link Text** (if that field is not already filled out). In the **Subject** field, enter a default subject for the message. Of course, users can change this text when they create the message.

5. Finally, click **OK** to insert your link into your web page.

### Using Images

A graphic element on a page adds balance and makes it eye catching. Your site comes stock with a library of images and "jelly buttons" that you can use, but you can also add your own images via the File Library. To add your own image to your content...

1. In the **Content Editor**, click the image icon  in your toolbar.

2. You're presented with a list of files (if any) that you've uploaded to your site. Click the file you want to insert into your page.

3. If you need to upload an image to your site, click the **Upload Image** tab to do so.

4. A preview of the image appears in the box on the right. Verify that the image is indeed the one you want to insert. If you need to adjust the image preview so that it's smaller or larger, you can use the zoom buttons above the image preview. If you're unsure which button is which, just hover your cursor over each button for a description of how it zooms. Options are:
   - Best Fit
   - Actual Size
   - Zoom In
   - Zoom Out

5. Type a short description of the image into the **Image Alt Text** field. This description appears whenever viewers hover their cursor over the image and can improve your search engine ranking (when combined with other techniques in your site) as search engines can read this text.

6. Finally, click **Insert** to place the image into your page.

Once an image is in your web page, of course, you may also want to do some of the following things:

- Click the **Hyperlink Manager** icon to add a link into the image.
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- Click an image and then press **DEL** on your keyboard to delete it.
- Click one of the image handles and drag it across the screen to **resize the image** as it appears in your page.
- Create a thumbnail (miniature version of the image) for the image by clicking the **Image Manager** icon and using the **Thumbnail** button.

**Resizing Images**

To resize an image you've added to your web page...

1. In the **Content Editor**, click the image you want to resize and note the "handles" that appear on its sides and corners.

2. Click one of the handles in the area where you want to begin resizing and drag the image handle in the direction you want to enlarge or shrink the image. For example, to make the image wider, "grab" the handle on the right side or left side of the image and "pull" it so that it "stretches" or resizes into a wider image.

   **Hint:** While clicking and dragging is the easiest method of resizing an image, there is the possibility that you’ll skew or scrunch your image while you’re dragging. To ensure that the image is scaled properly in both dimensions, use the Image Properties tool instead.

   **Note:** This process lets you shrink images so they appear smaller on screen. However, it does not decrease the actual file size. To decrease an image's file size, you need an image editing program and may need the assistance of a professional image designer.

**Image Thumbnails**

Thumbnails are miniature versions of an image you've made available on your site. In most cases, they're used in image galleries as a means of making the page load more quickly as smaller image files do not take as long to load. The idea of the image gallery is that your viewers click the images in which they are interested to see the larger versions. If you decide to build an image gallery in your site, need to create an image thumbnail for another reason, or just need to resize an image (file size and all), you can use your site's built-in thumbnail creation tool to do the job. To create an image thumbnail or resize an image...
1. In the **Content Editor**, click the **Image Manager** icon in your toolbar.

2. You're presented with a list of files that you've uploaded to your site. Click the file you want to resize or turn into a thumbnail.

3. In the toolbar above the image preview, click the **Create Thumbnail** button to the far right.

4. The preview is replaced by the **Create Thumbnail** screen asking for details about your new image. A suggested file name appears in the **New Image Name** field. If you're satisfied with this name, continue filling out the details of your thumbnail (or resized) image. If not, type in a new file name for your scaled image. Keep in mind that if you're resizing an existing image, you can either create a new file sized to fit your specifications or you can overwrite the existing file in your File Library by changing the file name to the same name as the original file.

5. Decide whether you want to scale your image by percent of its current size or by its pixel width and height. Once you've decided, choose the appropriate option from the **Dimension Unit** drop-down menu.

6. If you want to ensure that you do not stretch or skew the image so that it appears distorted, check the **Constrain Proportions** box.

7. If you want to ensure that any existing file with the file name you specified earlier are overwritten by the new file, check the **Overwrite if File with Such Name Exists** box.

8. Finally, type the width and/or height to which you wish to scale the image. As you do this, keep in mind whether you're scaling by percentage or by pixel width/height.

9. When finished, click **Create** to create the image.

   The scaled image or thumbnail is automatically added to your File Library. At this point, since the Image Manager remains open, you can continue to insert the new scaled image into your page or continue creating thumbnails as you see fit.

### Image Properties

There are several options available to change how your images are treated on a page. For instance, you can force the text to flow around your images or add a border to them. To change an image's display properties:

1. In the **Content Editor**, click on the image to select it. A panel appears at the bottom of the editing window, allowing you to set certain features.

2. Click the **Set Image Properties** button for more options, or right-click the image and choose **Set Image Properties**.

3. Change any of the options to create the desired effect and click OK when you're finished.

Here's a brief description of your options:

- **Border Width** - To add a border to your image, type a number into the **Border Width** text box (or use the plus and minus buttons). The higher the number, the thicker the border. Enter a 0 to ensure that your image has no border.
• **Border Color** - If you have selected a Border Width of at least 1, you can also change the color of the border. Just select the desired color from the drop-down menu.

• **Image Alt Text** - Enter text here that you would like displayed whenever users hover their mouse pointer over the image. It can be a caption, a description, or (if the image is used as a hyperlink) instructions on what to do.

In addition, this text appears in those rare instances when a user's browser doesn't display images (on a mobile device, for example).

• **Long Description** - Enter text here that you would like displayed whenever a user views your pages using a "handicap enabled" browser. These browsers will "read" the text to the site visitor.

• **Image Align** - The Image Align feature allows you to control how the Image interacts with surrounding text on your web page. Select the **Left** or **Right** option to move the image to one side or the other and wrap the text around the image. Clicking the **Top**, **Center** or **Bottom** option places the image in line with your text, and positions any text to the left or right at the top, center or bottom of the image.

• **Image Src** - This option displays the URL pointing to the source file for the image. Since XSites host all your image files, you won't need to use this tool.

• **Spacing** - Horizontal and Vertical Spacing allow you to add empty space around your images so that any text does not display flush against the image. As you increase the number, the space gets larger. Clear the fields or enter a 0 to eliminate any space.

• **Size & Constrain** - Use the Width and Height text boxes to change the size of your image. Enter the desired dimensions in pixels. To ensure that your images don't get skewed or scrunched, use the **Constrain** tool. If the chain link is connected, when you change one dimension, the other changes proportionally. Click the chain link to switch between constrained and unconstrained dimensions. Of course, you can also resize an image by clicking and dragging it.

### Image Maps

Image Maps are handy tools that you can create to break down an image into multiple sections, linking each section to something else in your site. One illustration of an image map is a picture of the United States on a website. If you wanted to create an image map out of the full image of the US and link each state to a page about that state, you'd break the image down into sections (states in this case), and link each section (or state), to a page about that site.

Before you begin working on your image map, you need to collect several resources, including:

- An image to use as an image map
- A list of links you want to insert into your image map
- An idea or list of areas in the image into which you want to embed your links.

1. In the **Content Editor**, right-click the image into which you wish to embed links and select **Image Map Editor** from the menu that appears.

2. When the Image Map Editor appears, decide which type of image section will better suit your needs and mark the corresponding choice - **Rectangle** or **Circle**.
3. Now, click the image where you’d like to begin drawing and drag a rectangle or circle (depending on your choice) around the section you wish to break into a link.

4. Once you're satisfied with the size of the circle or rectangle, release your click and then click the blue area that appears to move it to exactly the location on your image where you want it. If you need to work with great precision, you can move the area by increasing or decreasing its distance from the Left and Top of the image using the corresponding fields on the right.

5. If you need to adjust the size of the area, click the red square attached to the area and drag it until the area is the size you desire. You can fine tune this sizing process by typing the exact Width and Height into the corresponding fields on the right.

6. Once you're satisfied with the size and placement of your image section, type the URL (or web address) with which you want it to link into the URL field provided.

7. Pick a Target from the menu provided to determine how you want the link to open. Options are:
   - New Window - Opens the web page in a new window
   - Same Window - Opens the web page in the main window
   - Frame - Opens the web page in a frame - keeping just your site header intact.
   - iFrame - Opens the web page in a frame - keeping just your site header and side navigation intact.

8. Type a short Comment in the available field to indicate what this link does.

9. When finished, click Update Area to apply your change to the area you’ve created.

10. Continue creating new areas by repeating steps 6 - 13 until you’ve completed your image map. If you need to remove an area from your image map, click it and then click Remove Area. If you need to remove all areas from your image map so you can start over, just click Remove All.

11. When finished with your image map, click OK to apply it to your web page.

Using Clip Art

Your XSite includes a stock set of provided clip art that you can use in your web page. If you want to add some flare to your site and you don’t already have the fancy buttons or clip art images you need, consider using some of the provided clip art. To insert clip art into your web page:
1. In the Content Editor, click the File Manager icon to view and place clip art into your page.

2. In the screen that appears, click each clip art item’s file name to view a live preview of it in the Image Preview box on the right.

3. When you find a piece of clip art that will suit your needs, click it and then click Insert to place it in your page.

Using Tables

Tables are a valuable element when laying out a web page. The can be used to:

- Build columns of numbers or data
- Control how text flows around an image
- Place text or images in specific places on a page

There are two ways to add a table while in the Content Editor:

**The Basic Mode** allows you to drag and select rows and columns. Just click the table icon in the tool palette and then drag your mouse to select the number of rows and columns you’d like to include in your table. You can now enter data into any of the cells in your table. To modify the design of the table, right click anywhere in the table and choose from the options displayed.

**The Table Wizard** gives you more control over the initial creation of your rows and columns. Click the table icon in the tool palette and then choose the Table Wizard item at the bottom of the menu.

- Use the - and + buttons next to the Columns and Rows labels to add or remove columns from your table.
- Use the column or row span + button to make a particular column or row span others. For example, you may wish to have the top row of a table "span" all the other rows to center a header in that cell.
- Click the Table Properties tab to specify the overall look of the table - size, background color, border size, cell spacing.
- The Cell Properties tab allows you to specify size, background color and alignment for each cell.
The Accessibility tab allows you to enter information about your table that will be read to viewers using a handicap-enabled browser.

When you are through with the Table Wizard, click Insert and your table will be drawn on your web page.

**Hint:** You can create a new table inside the cell of an existing table. This can be particularly useful in laying out complex information on a web page. Just place your cursor in any cell of a table, then use either method described above to insert that table.

**Hint:** Rather than creating a table from scratch in the editor, you can also copy and paste tables from Microsoft Excel or Word. Most of the formatting will be preserved, including borders, text, numbers and cell color. Formulas, however, will not be pasted.

## Table Properties

The Table Properties dialog allows you to adjust settings that affect the entire table, rather than just a few cells. Click anywhere in a table, then right-click and choose Set Table Properties from the pop up menu. If you need to adjust the number of rows or columns - or change the cell spanning - use the Table Design area which first appears. Or, click the Table Properties tab to make additional changes.

- **Table Dimensions** - Set the desired Height and Width for the table. You can enter the amount in Pixels or as a percentage of the total size of the page. To enter a percentage, just type the percent sign (%) after the amount (i.e. 25%).

- **Background color or image** - A table can have its own background color. Just select the desired shade from the drop down menu. The Background Image option is not supported on XSites.

- **Alignment** - From the drop down menu, select how you’d like the text in your table to line up. You can select any combination of the left, center or right. You can further modify this option on a cell-by-cell basis.

- **Cell Spacing** - This refers to the amount of space between the borders of the cells. Use the + and - buttons, or type a number in the text field to set this dimension in pixels.

- **Cell Padding** - This refers to the amount of space between the border of the cells and the text contained in it. Use the + and - buttons, or type a number in the text field to set this dimension in pixels.

- **Borders** - Use the Border tool to set the width and color of the border lines. First, select a color from the drop down menus. Then, use the + and - keys to set the border width, in pixels. Now, click any of the border buttons on the top, left or bottom side of the screen to choose which border line you wish to apply. Notice that all borders must be the same color.

- **ID and CSS Class** - These options are used for advance table editing and are not supported on XSites.

## Cell Properties

The Cell properties dialog box allows you to adjust how each individual cell - or group of cells - will appear. Click in the
cell you wish to modify, or click and drag to select multiple cells, then right click and choose the Set Cell Properties item from the pop up menu.

- **Content Alignment** - From the drop down menu, select how you’d like the text in your cell to line up. You can select any combination of the top, middle, bottom, left or right.

- **Background color or image** - Each cell can have its own background color. Just select the desired shade from the drop down menu. The Background Image option is not supported on XSites.

- **Dimensions** - Set the desired Height and Width for this cell. You can enter the amount in Pixels or as a percentage of the total size of the table. To enter a percentage, just type the percent sign (%) after the amount (i.e. 25%).

- **No Wrapping** - This turns text wrapping on or off. If this box is checked, text entered into a cell will cause the cell to grow, rather than wrapping to a new line.

- **ID & CSS Class** - These options are used for advance table editing and are not supported on XSites.

### Modifying Tables

Once tables are on a page, you can add information by clicking in any cell and typing. Or, you can further modify your tables using any of these tools:

- Click any gridline on a table to select it and then drag the handles to resize the entire table. You cannot drag individual cell lines.

  **Hint**: By default, a new table has its border width set to 0. You can see the table in the editor with each cell outlined with dotted, grey lines. You can turn these lines on or off by clicking the Show/Hide Border button at the bottom of the editor.

- Right-click any selected table and choose Set Table Properties to further modify it.

- To remove a table completely, select the table, right-click and choose Delete Table from the popup menu.

  **Note**: As you work with your table, note the grey area at the bottom of the editor. This displays several options for modifying your table without opening the Table Properties dialog box.
Click in any cell, then right click to display a pop-up menu which allows you to:

- Insert columns or rows
- Merge cells together (you must select two or more cells first)
- Split cells to add additional rows or columns
- Delete a row, column or cell
- Open the Table or Cell Properties dialog
- Turn cell borders on or off

**Using Multimedia Content**

Multi-media files like videos and music can add a rich dimension to your site. Visitors can view or listen to these items while browsing through your site, increasing the chances that they'll spend more time learning about your business.

The Content Editor allows you to upload these types of files and then create links to them within your pages.

1. In the Content Editor, click the **Insert Media** button in the toolbar.

2. In the **Media Manager** screen, select the media file you wish to insert into your page or click on the **Upload Media** tab to upload a new file.

The remaining options pertain to how the media file is displayed and functions on the page. At any time, click the **Switch to Preview Mode** check box to view or listen to your media file.

**Note**: These settings are applied to the media file in your File Library, not to the current web page. Thus, once set for a particular media file, these options will apply whenever that file is inserted into a page. Likewise, to modify the settings for a media file already inserted into one or more pages, simply open the Media Manager, select the file and make your changes.

- **Width/Height** - Specify how many pixels wide and high the media file should display. If these entries are different from the native size of the media file, then the image will be expanded or compressed when visitors view the page.

  **Hint**: If you're inserting an audio file into your page, there will be no video area to display, of course. You can have the audio play without showing anything on screen by setting both the Width and Height to zero.

  However, if you want users to have control over starting, stopping and rewinding the audio, you should still display at least the media control panel, but setting the Width to 200 and the Height to 40.

- **Align** - This setting controls where the media file is placed on the page and how text is wrapped around it. For example, choosing Right from the drop down menu places your media image on the far, right side.
of the page, and wraps any text on the page to its left.

- **Properties** - There are a number of properties that control how your media file is treated when it's loaded on a page. Depending upon the property chosen, additional fields are displayed below the Properties drop down menu. In addition, text describing each property and how it's used is displayed. Here are some Properties that might be particularly useful in placing media files on your site:
  - **AutoStart** - Set this to Yes and your media file will start playing as soon as the page is loaded.
  - **ClickToPlay** - If you’d prefer to have visitors click on the media file to start playing, set this property to Yes.
  - **ShowControls** - This property lets you specify whether the start, stop, pause, fast forward and rewind tools are displayed for your media file.
  - **Volume** - Use this to adjust the initial volume of media file.

3. When you're satisfied with your options, click **Insert** to embed the media file into your web page.

### Using HTML Code

Your site gives you the freedom to edit the HTML code of any page or ad directly so you can have complete control over your content if you need it. In addition, if you owned another website prior to purchasing your XSite and you want to carry some of the content from that site into your new XSite you can do so by copying and pasting the HTML from your previous site into the Content Editor. To do so...

1. In the **Content Editor**, click the button in the toolbar at the bottom to switch to HTML Mode.
2. In the page content from your old site, select the content or HTML you wish to copy.
3. Copy the "source code" of your existing web page to your clipboard. One easy way to do this once you've selected the content you wish to copy is to use **Ctrl + C** on your keyboard.
4. Go back to the XSite editor, click in the area for editing the HTML and press **Ctrl + V** to paste in the source from your old page.
5. Make any changes you need to make to your HTML code and click the button to see how it looks on your site.
6. From here, edit the page as you would any other. Be sure to click **Save** when you are through. If your previous page had images, you may need to copy those over separately and re-link them.

### Copying Data from Microsoft Word

Some web page editors, like Microsoft Word, add extraneous codes and tags to your web pages. While these normally don't cause a problem in displaying the pages on their own, they can cause some odd results when they're pasted into existing HTML content pages. To handle this, the editor has a few buttons that can help.

- **Paste from Word** - This option pastes any content copied from Word into the editor, but first strips out any extraneous codes or tags.
Paste Plain Text - Often the safest option, this tool pastes in just the text you've copied. Any codes or graphics are left out.

Paste HTML - This option pastes the actual HTML code into the editor. It is rarely used.

**Using Flash Content**

Using the Content Editor you can insert a Flash (SWF) file into your web page, allowing you to make anything from fancy forms, to videos, to special effects. After all, your XSite itself is designed using Flash technology.

**Note:** Creating Flash files is beyond the scope of this user's guide and our support staff. If you believe that custom Flash content will add value to your site, consult a web design professional for assistance designing and implementing this content.

1. In the Content Editor, click the **Insert Flash** button in the toolbar.

2. From the **Flash Manager** screen, select the Flash file you wish to insert into your page. If you need to upload a flash file, click the **Upload Flash** tab to do so.

3. Using the fields provided specify the **Width** and **Height** of the Flash player in your page. In addition, you can specify alignment, "video" quality, background color, and other behaviors of the Flash file.

4. To preview your Flash file before inserting it into your site, check the **Switch to Preview Mode** box.

5. When you're satisfied with the placement and characteristics of your Flash file, click **Insert** to place it in your page.

**Uploading Files**

Your site's Content Editor has an additional built in File Manager that provides some special functionality for you as you edit your content. While you can always upload and manage the files in your site's file library from the File Library tool in your site, there are several benefits to using the File Managers in the Content Editor like the ability to upload files on-the-fly so that you don't have to remember to upload them before you use them in your content. To upload a file or files to your site's File Library from the Content Editor:

1. In the Content Editor, click any of the file management buttons that pertaining to the type of file(s) you wish to manage.

   **Note:** While you can use any of these managers to upload all types of files, you can only view those files from their respective managers. For instance, if you're uploading image files, you could upload them from the Media Manager, but you would not be able to view them unless you opened the Image Manager.

2. In the screen that appears, click the **Upload** tab. The exact tab name varies depending on the type of file
manager you selected. For instance, in the Image Manager, the tab is labeled "Upload Image."

3. Click **Browse** to select a file to upload.

4. Browse to the file you wish to upload and click **Open**.

5. Repeat this process for any additional files you wish to upload.

6. Once you've selected all the files you want to upload, click **Upload Files**.

7. If the files you're uploading are images, your site evaluates the size of each image file before adding the images to your file library. If the images exceed the optimal size for your web page, a warning appears asking you about how you want to handle the large images. Mark your preferred option and click **Continue** to upload your files. Options include:

   - **Automatic Image Optimization** - If you want your site to automatically optimize your images for viewing on the web, mark the first option. If you don't want your site to prompt you about the file size of your images again, check the **Always use this selection** box to force your site to optimize every image you upload automatically.

   - **Uploading without Optimization** - If you want to continue uploading your photos despite their file sizes, mark the second option to continue without optimization. For best results, you should not use unoptimized images in your site as large image files can slow down the page loading process for your site visitors.

      **Hint**: If you want to manually optimize your images, there are a variety of image editing programs you can use to do so. For a full description of the process you must use to optimize your images for use on your website, see Tech Doc 7006.

The Content Editor immediately begins uploading your files to your site and a progress bar appears to show you the progress of the upload.

**Note**: Depending on the limitations of your Internet Service Provider (ISP), it is possible that this process may time out. Generally, this occurs whenever you choose to upload too much information at one time. To address this problem you need to adjust the total file size of your upload. If you attempted to upload multiple files, try uploading again with fewer files. If you attempted to upload one file and its size caused a timeout, try reducing the file's size. Otherwise, you may
Deletion of Files

Once you've uploaded files to your site, you can remove them from your File Library:

- Visit your XSite's File Library tool, select, and delete them individually. For more information about this process, see the File Library section of this user's guide.
- Use your Content Editor's deletion tools to remove the files.

To use the Content Editor's deletion tools to remove files from your File Library...

1. In the Content Editor, click the file management button that pertains to the type of file(s) you wish to delete.
2. In the screen that appears, click to select the file you wish to delete.

   Note: If you don't see the file you wish to delete, you may have chosen the wrong file manager. For instance, you won't see image files in the media manager as that manager handles music and movie files.

3. Click the trash can icon at the top of the files list to delete the file you've selected.

User Management

Previously, XSites supported only a single login. Since your XSite is now a place where your staff goes to access orders, e-mail, their schedule and more, we've incorporated the ability to have multiple accounts and logins – with an “administrator” account to control who has permissions to which part of the XSite.

Your administrator account will initially be the “default” login you were given at the time you ordered. When logging in with this account,

When logged in as the administrator: The first screen you see after clicking User Management is a list of all your users.

- To edit an account, click a link for any user in the Site Users pane on the left.
- To delete an account, open it for editing and then click the Delete this user link at the bottom of the profile.
- To add a new account, click Add User in the Site Users pane on the left.

When logged in as a non-administrator: User Management goes straight to that user’s account details, but hides permissions options.
Login Info

The login information is the username and password this person will use when they go to the admin area of your XSite. This is typically their CertMail account info. You can set up a PIN number in addition to your password to make it easier to log in from mobile devices.

E-mail Options

When setting up a new user, the administrator has two e-mail options:

- Use an outside e-mail address and save one of the CertMail accounts.
- Create a CertMail account for this user by entering their information here. The “friendly name” is what shows up in the “From” when they send messages and the forwarding field is where you can specify one or more (separate e-mail addresses with a semi-colon) other e-mail addresses to which their CertMail is forwarded.

See our chapter on CertMail for more e-mail account management details.

Public Profile Details

This is some of the information visitors to your website will see when you’ve enable the Staff Profiles page in step 7 of the XSites Wizard.

- Be sure to set your Time Zone!

- To upload a photo, click the Change link beside the Portrait option. Then, browse to and select the image on your PC and click Upload.

- To change the text for the user’s bio (or resume) click the Change link next to the Bio Text option. This pulls up our web editor where you can then type up the bio or paste text from a word processor or other web page.

User Privileges – Admin only

The administrator can lock down certain items on a user by user basis.

- Order Management – Some offices prefer the orders flow through only certain individuals, so you can disable this when needed. Likewise, you can decide which XSites Network profile receives the orders when sent through this site by clicking Edit.

XSites Statistics

This is where you see which pages on your site have been getting the most traffic and from where. After logging into your XSite admin area, click XSite Statistics from the My Office screen. We’ve arranged this screen and the information so that you don’t have to be an official webmaster to make heads or tails of the information.

- Most of the sections show you a page name and then stats going back a varying number of days. You can sort columns in these lists by clicking the column header (i.e. Clicking the “7” would sort on that column.)
Likewise, you can pick your own date range for a category by picking your own start and end date and then clicking Submit.

Here’s a brief description of each of the sections. The “Tell me more” link for each section also gives details.

- **Online ordering stats.** Displays pipeline, average fee and turn time.

- **Page Views.** This shows a list of your top pages and how many views they're getting. Your home page will usually be your top page, but isn’t it interesting to know what other content visitors are reading.

- **Entry pages.** An “entry page” is the first page somebody hit when they entered your site. If you publish articles or list URL’s other than your domain, this shows how effective they were. For most, the home page will probably be the top entry page, followed by order management.

- **First time and returning visitors.** Whenever someone visits your website, their IP address and other information is logged on our servers. (Did you know that YOUR information is also sent to all the websites you visit?) So, we know if they’ve been to your site before and give you statistics here.

- **Referring URLs.** Another piece of information sent to a web server when a computer browses to a site is the last website you were viewing before reaching the server. Some of this information may be meaningless to you, but if you see a lot of “hits” that have Google or Yahoo! in them or maybe a news site where you posted an article, you’ll know from where it is people are hearing about your site.

- **Common Search Phrases.** We analyze your referring URL’s and pick out which ones are from search engines and also the text that led someone to find you there.

If you’re serious about web “hits”, consider tracking the information we display here in a spreadsheet so you can get additional running totals and truly measure the success of your marketing efforts.

### Client Data Capture

For many inspectors, one of the primary reasons for maintaining a web site is to acquire data or feedback from clients. When it's done right, your XSite can play a major role in your business development strategies. Client data capture tools are a valuable asset in helping you execute that strategy.

For every page on your XSite, you can add a customized client data capture form that allows you to request whatever information you like from your site visitors. When site visitors complete these forms, the information goes straight to you, and the sender also receives an instantaneous response sent to their e-mail letting them know their message was received - no guesswork.

To use your XSite's client data capture tools click **Wizard** in **My Office** and then access the various client data capture tools inside the **Extra Tools** pane.

### Creating Forms

To create a new lead capture form...

1. From your site's lead capture tools, click **Form Manager** in the **Lead Tools** pane on the left.
2. In the Form Manager, click **Create a Form**.

3. In the screen that appears, type a name for the form into the top field - "Customer Survey," for example.

4. In the field below that, type any instructions or notes you’d like to provide your prospect.

   **Hint:** Explanations about why you need specific information to serve your client and guarantees that you will respect the prospect’s privacy have proven to boost lead capture form effectiveness.

5. Below the instructions field, you can ask as many questions as you like. There are two items you can add to your forms: groups and fields.
   - **Groups** - Use groups to mix like questions into sections on your form. To add a group, click one of the **Add a Group** links. Then, type a title for your group into the box provided.
   - **Fields** - Use fields to ask the questions. To add a field, click one of the **Add a Field** links. Then, type your question or field label into the box provided.

6. As necessary, toggle your fields between short, one-line responses and longer, multi-line responses by clicking the single line and multi-line icons to the right of each field.

7. To flag a field as "required" so that the prospect is forced to fill it out to submit a form, check the box beside the field.

8. Rearrange your groups and fields into the desired order by using the green up and down arrows beside each group and field.

9. If necessary, delete a group or field using the delete icon to its right.

10. When finished creating your form, click **Save**.

   To add a lead capture form to a page in your XSite, see the Embedding Forms section of this user’s guide.
Embedding Forms

To embed a lead capture form into the body of one of your web pages...

1. First, be sure that you've created the form you wish to embed into a page of your site.

2. Then, from your site's Lead Capture tools, click PowerView in the Extra Tools menu on the left.

3. From the PowerView, find the page into which you wish to embed your form. As necessary, use the options at the top to filter the pages listed in the PowerView so you can find the page you need more quickly. Options include:
   - Filtering by State - To filter the pages by whether you've activated them on your site by checking them in My Content, choose Show Active Pages option to limit the pages to just activated pages. Otherwise, choose Show All Pages.
   - Filtering by Page Type - To filter the list of pages by the page category (e.g. listings pages, provided pages, custom pages) in My Content, choose an option from the Show the Following XSite Pages drop-down list.
   - Filtering by Form - If you're using the same form on multiple pages on your site, you can filter list of pages by those that use a particular form. Just choose the form from the Show Pages that Use this Form menu.
   - Filtering by Contact Group - To filter the list of pages by the contact group into which you're enrolling new leads, choose the contact group from the Show Pages Where Leads Are Added to this Group menu.

4. When you find the page into which you wish to embed a lead capture form, click the Edit Settings link beside its title.

5. Choose the form you wish to embed from the Embedded Form menu.

6. Choose a Contact Group into which you want to enroll the leads that contact you through the form.

7. Then, click Save to save your changes.

Using Doorway Forms

While embedding contact forms into the pages of your site in various ways is an excellent tactic to generate leads, sometimes you may want to use a form as a "doorway" that blocks access to a page of your site unless your visitor fills it out. And still in other times, you might just want to periodically remind your prospects that they can contact you for assistance on your site. Both of these tactics form the basis of your site's doorway forms tools.

Blocking Doorway Forms

Blocking doorway forms allow you to prevent access to a specific page of your site OR to further access to your site...
by requiring the visitor to supply a password OR fill out a form before continuing through your site. To set up a blocking form that "prevents" access to a specific page of your site...

1. From your site's lead capture tools, click **PowerView** in the **Extra Tools** menu on the left.

2. Find the page you wish to block in the list provided. As necessary, use the options at the top to filter the pages listed in the PowerView so you can find the page you need more quickly. Options include:
   - **Filtering by State** - To filter the pages by whether you've activated them on your site by checking them in **My Content**, choose **Show Active Pages** option to limit the pages to just activated pages. Otherwise, choose **Show All Pages**.
   - **Filtering by Page Type** - To filter the list of pages by the page category (e.g. listings pages, provided pages, custom pages) in **My Content**, choose an option from the **Show the Following XSite Pages** drop-down list.
   - **Filtering by Form** - If you're using the same form on multiple pages on your site, you can filter list of pages by those that use a particular form. Just choose the form from the **Show Pages that Use this Form** menu.
   - **Filtering by Contact Group** - To filter the list of pages by the contact group into which you're enrolling new leads, choose the contact group from the **Show Pages Where Leads Are Added to this Group** menu.

3. When you find the page you wish to block with a lead capture form, you can either password protect the page to generate leads through password requests OR select a specific doorway form to block the page.
   - **Password Protecting Pages** - To password protect the page, click the lock icon by the **Password Protection** section for your page. In the box that appears, type a page password and then click **Submit** to save it.
   - **Blocking Pages with Specific Forms** - To select a specific form with which to block the page, click the **Edit Settings** link beside its title. Then, choose the form you want to use to block the page from the **Doorway Form** menu and select a **Contact Group** into which to enroll the contact from the **Contact Group** menu. By default, the form is optional for your visitors, but if you also want to use your blocking form to force the visitor to provide certain information, check the **Required** box on the right. Then, click **Save** to apply your changes.

**Note**: Doorway forms and, in particular, required doorway forms are effective lead generation tools when used properly. But if you use them excessively or require too much information, they're often more frustrating to your visitors than they are useful. For best results, use doorway forms sparingly, and only in places where you've justified the value of what you're offering in exchange for the visitors' contact information.
Reminder Doorway Forms

Reminder forms are forms that periodically pop up to prompt the visitor for information. Unlike traditional blocking forms, they aren’t attached to any specific page of your site. Instead you specify how often the forms should appear as the visitor browses your site to control when it appears. You can also use reminder forms as blocking forms by capping the number of pages a visitor can view on your site without providing contact information. To set up a reminder form on your site...

1. From your site's lead capture tools, click **Global Settings** in the **Extra Tools** menu on the left.

2. In the screen that appears, check the **Activate the Page Counter Trigger** box and specify the number of pages that you will allow visitors to view on your site before "reminding" them with a form.

3. From the drop-down menus on the right, select a form to use as your reminder form and a contact group into which to save the leads from the reminder form.

4. To use the reminder form as a blocking form that prevents your visitors from browsing through your site until they fill it out, check the **Require the visitor to complete the form** box.

5. If you're not using the reminder form as a blocking form, you can specify a maximum number of times to show the form to your visitor by checking the **Until the visitor fills out this form, show it a maximum of** box and specifying a maximum number of times to show the form.

6. To tell your site which pages to "count" as a gauge for how often to show your reminder form, check the boxes in the **Pages to Count** section. Options include:
   - **Include Content Pages in Count** - Content pages are all of the pages of your site with the exception of those pages that display a list of your listings. Check this box if you want to show your reminder form even while your visitors are casually browsing your site.
   - **Include Listing Pages in Page Count** - Listing pages are pages that display a full list of the listings you're providing through your site. Check this box if you want to display the reminder form as your visitors browse through the different types of listings you're providing on your site.

7. If you want to use a reminder form as your clients are browsing the full listing details for various listings on your site, check the **Activate the Listing Detail Trigger** box and repeat steps 4 and 5 for the Listing Detail Trigger.

8. When finished, click **Save** to apply your changes.

Foreclosure.com Integration

Our partnership with foreclosure.com allows you to offer your visitors access to preforeclosure, foreclosure, bankruptcy, For Sale By Owner (FSBO) and tax lien listings right on your site. All you have to do to provide search tools on your site that integrate directly with foreclosure.com is enable them on your site and you can start generating leads from those prospects interested in foreclosures. You can
enable foreclosure.com integration on your site in one or all of three ways:
1. As a dedicated "listings" page on your site
2. As a custom footer in your site
3. As dynamic content in a page of your site

Foreclosure.com as a Dedicated "Listings" Page
To enable a dedicated search page on your XSite that integrates with foreclosure.com...
1. Click Foreclosure.com in the Extra Tools pane on the left of the XSites Wizard.
2. In the foreclosure.com page, check the Foreclosure Listings Content Page box.

Foreclosure.com in Your Site Footer
To enable a foreclosure.com search form in the footer of your site...
1. Click Foreclosure.com in the Extra Tools pane on the left of the XSites Wizard.
2. In the foreclosure.com page, check the Foreclosure Listings Content Footer box.

Foreclosure.com as Dynamic Content in a Page
To enable a foreclosure.com search form in any page of your site as dynamic content...
1. Edit any page of your site.
2. Check the box to Include Dynamic Content and then click Customize in the Other Page Options section.
3. Check the Foreclosure Listings box.
4. If you'd like to include a clickable US map as a search tool in addition to the basic search options, check the Include Clickable Map box.
5. Click Save Changes and then click Save and Close to save the page.

Reviewing Lead Capture Stats
Strong lead capture forms are often developed over time and tested in different strategic places on a site for the "best" place to put them. As you work with your site, if you want to track the effectiveness of a particular form or the placement of a form, you can do so through your site's lead capture tools.

Tracking Form Placement Stats
To track the effectiveness of where you've placed a particular form...
1. From your site's lead capture tools, click PowerView in the Extra Tools pane on the left.
2. Check the **Show Lead Capture Stats by Page** box in the upper right corner.

3. Scroll down to a page containing the form you wish to track (regardless of whether the form is embedded or a doorway form). Below the page setup details, you will see an overview of the number of leads acquired through the form attached to your page.

### Tracking Form Effectiveness

To track the effectiveness of a particular form regardless of its placement...

1. From your site’s lead capture tools, click **Form Manager** in the **Extra Tools** pane on the left.

2. Review the stats beside each form in your site to determine how many pages include the form and how many leads have come through that form in the history of your site.

### Search Engine Tools

Instead of requiring you to log into the various search engines and submit your pages one by one every time you make a change, we’ve given you the Search Engine Tools area of your XSite.

In addition to giving you an easy interface where you just mark the pages you want to submit, we also give you sound advice regarding how search engines think. Did you know that submitting your pages too often can actually penalize your ranking? Did you know that search engines, such as Google, would rather find you because somebody else linked to you? Did you know that failure to update your site regularly causes search engines to “forget” about you? We have full time people devoted to understanding search engines. This is where you get to take advantage of their expertise!

### Order Management

Inspector XSites on-line order manager lets you perform essential tasks like posting order status and viewing your pipeline without the need for additional software on your computer.

To access your order through your XSite, just click the **Orders** link in your “My Office” toolbar after logging in.

- Your web-based order management system will first show you a list of all your open orders with their present, or most recent, status plus some high-level statistics about orders on your XSite.
- While viewing this list, you can sort it by clicking a column heading.
- You can view orders based on their status by clicking a status item from the left side of the screen.
- If you have more orders than will fit on one screen (as designated by the drop-down box next to “Show” at the top of the screen), just click one of the numbers above the column headings to get to another page.
- When orders are completed, the PDF icon in the list gives you direct access to the PDF version of the inspection.
To view the details on an order or take action on it, just click the order’s status in the first column of the order list.

The web interface for online ordering is managed through our XSites Network – which was known previously as the “Mercury Network”. Since the personalized, private label, Inspector XSite ordering interface has proven to be a lot more popular than the generic “Mercury” system, we’re migrating Mercury to be exclusive to XSites only and rebranding it as the “XSites Network”.

Working with Orders

As mentioned previously, when viewing the orders list, you can access details and make changes by clicking the link for the order’s status. Once you’re viewing details for an order, new options appear under the Order menu.

Most of these items are self-explanatory, but we’ll describe them here.

- **Edit** - Any orders placed on your XSite can be edited.
- **Send Message** - This will send the client e-mail as well as log the communication permanently with the order.
- **Delay** - This logs the status of the inspection as delayed.
- **Resume** - This takes a delayed order and re-activates it.
- **Cancel** - This takes an order out of your active list. You may want to use Cancel on test and sample orders so they don’t affect your statistics and reporting.
- **Complete** - When an inspection has been completed and the report is ready to deliver, use this option to send notification to your client, update the order status and upload the final report to your XSite.
- **Reassign** - Your online ordering system accommodates subaccounts. When you reassign an order, you can still maintain control over it. See the section, Subaccounts & Reassigning Orders for details.
- **Attach Document** - Here, you can upload documents or use our DirectFax feature that digitizes things you fax to your website. See the section, anything paper into an order for details.
- **Print** - Generate a hard copy of the order details.
- **Delete** - Get rid of old orders in your system. This should only be used for sample or test orders, or any other order that you don’t need to keep or want to include in your management reports.
- **Change Status** - Depending on what the current status of the order is, you’ll have different options on this screen. For example, if an inspection hasn’t been scheduled, we’ll default to that status item.

It’s important to note that all of the above actions result in communication being sent to your client. That’s the whole point of managing orders online – keeping your client informed proactively and saving everyone the time and hassle of repeated phone calls for status. A few minutes here and a few minutes there throughout the course of an assignment can add up!

XSites Network Profile

Your XSites Network profile is how your company is presented to users of our other real estate professional XSites as well our web-based inspector directory. It’s a
marketing tool for you and always a good thing when you get a new client from a free directory listing.

1. Login to your XSite’s admin area by going to www.whatever-your-domain-is.com/admin. Then, type your login and password.
2. Click the Orders link at the top of the admin area.
3. Click Profile and then Overview.

4. Click the hyperlinked (underlined) text to get to different sections of information.
   - Currently, due to irregularities in ZIP codes, coverage is by counties. However, you can specify in your profile exactly where you cover.
   - There is one fee per job type. However, you can add notes to specify additional charges based on location, size, etc. Use the fields.

### Subaccounts & Reassigning Orders

Orders placed on your XSite come into a central account. From there, you can farm them out to other inspectors that work for you. However, you still “own” the order and can track it and post status to it.

1. Create new profiles for your inspectors on the XSites Network at http://www.xsitesnetwork.com/. While in their profile, you may wish to clear the option for “Make available to all”. That way, they won’t be in the directory individually.
2. Then, go to your main profile from your XSite Orders link.
3. Click the Profile menu and choose Subaccounts.
4. Click Add and enter the login and password for the inspector. Repeat for as many inspectors as you need.

When you want to reassign the order, open it and click the Reassign button and select an inspector. You can also do this from the order in the Web interface. The inspector will receive notification of the order in e-mail.

### Creating Client Accounts

Once you can accept online orders, you’ll want all your clients using it. Save them a little time by creating an account for them. Here’s how:

1. Start in your XSite admin area. Click Orders.
2. This is where you can manage your orders and online identity.
3. To create an account for a client, click **Profile** and then **My Clients**.

4. Now, click **Signup Client**.

5. Select the account type and fill out a few details. Be sure the e-mail and fax numbers are accurate since that is how they’ll receive status notifications sent through your site.

6. Then, click **OK**. And that’s it.

At this point, your client is sent an e-mail notifying them of their online account, the login and password and how to use it.

We recommend holding a face-to-face meeting with your clients to show them your website and give a walk-through of the online ordering. That way, you can make sure they are comfortable in the process and answer any questions they may have about it. Bring fresh donuts, and you’ll further ensure their first experience with your website is a positive one!

**Get anything paper into an order**

Not everybody can work a scanner and make a PDF, so your XSite has a feature that lets you fax things to a toll-free number, along with a special cover page, and they show up in the online order. When documents are attached, each party is sent a special message notifying them of the action.

To attach hard-copy fax documents to an order, do the following.

1. Login to the **Orders** section of your XSite.

2. Locate the order to which you wish to attach a fax document, and click the link under the **Status** column in order to open the **Inspection Order Details** screen.

3. Click **Order** and select **Attach Document** from the pull-down menu.

4. On the Direct Fax Document Management screen, click the **Print Cover Page** button. A special bar-coded fax cover page will be generated which you will need to print to hard copy.

5. When the print dialog displays, select the printer to which you wish to send the fax cover page for print out, and then click Print.

6. Fax the bar-coded cover page along with the documents you wish to attach to your order to the fax number pre-printed on the cover page.

Again, your faxed documents will be converted to .TIFF format and attached to your order for both you and your client to access.
Attaching Documents to Orders

You can attach any electronically stored image or PDF file to an XSite order without having to fax it.

1. In step 4 above, instead click the **Upload** button.
2. Click **Browse** to find the file you wish to attach to the order, and then click **Open**.
3. Type a description of the file you wish to attach and then click **Upload**.

Coverage Information

To update your profile's list of products and services that you offer...

1. In the **XSites Network profile** section of your XSite, click **Profile, Coverage Information** in the menus on the left.
2. In the screen that appears, click **Add**.
3. A list of states and provinces in the US and Canada appears. Click the link corresponding to the state or province of your choice.
4. When the list of counties appears, simply check all of the counties that apply to your coverage area. Use the **Select All** and **Clear All** buttons at the bottom of the window to quickly select or deselect all the counties in the state of province of your choice.
5. When you've selected all the applicable counties in the state or province of your choice, click **Add** at the bottom of the screen to save your changes and continue adding counties in other states or click **Done** to return to your completed list of counties covered.

Mobile XSites

One of the most significant factors in your business success on the Internet is the speed with which you respond to requests on your website. And to that end, your XSite comes fully equipped with a host of tools you can use to manage your XSite from any Internet capable mobile phone or PDA. If desired, you can even accept text message from your website on your mobile phone so your customers can always contact you from your website, whether you're at your desk, or out on business. Your XSite's mobile tools include:

- New order notifications
- Access to send status from the field
- E-mail
- Your full XSites address book
- Convenient access to maps, driving directions, and weather
- Your full XSites calendar
- And instant text messages from your site to notify you of new leads

All you need to get started with your XSite's mobile tools is an active Internet connection. Since virtually every modern cell phone comes equipped with Internet capabilities, you may already have everything you need to get started with your mobile XSite whether you use the latest, Windows Mobile SmartPhone or Apple's iPhone. If you're uncertain about whether you're phone or PDA has Internet capabilities, contact your local provider.
To log into your XSite’s mobile tools...

1. Use the web browser on your mobile device to navigate to your XSite’s website address /mobile. (e.g. www.baytownrealestate.biz/mobile)

2. Then, either type in your regular XSite Username and Password or the mobile PIN number you created for your user account and click Sign In.

3. You’re immediately taken to your XSite's mobile My Office area. Just click any of the links provided to jump to your loan apps, CertMail, and more.

Configuring Mobile XSites

There are two simple configuration items provided with your mobile XSite to help you customize your mobile browsing experience: mobile PIN numbers and text notifications

Mobile PIN Numbers

Mobile PIN numbers help you log into your mobile XSite quickly by shortening your XSites password down into the form of a basic PIN number. To configure your mobile PIN number...

1. From User Management, click a user out of the Site Users list on the left or click Add User to create a new account or click the name of an existing account to edit the user's profile.

2. In the Login & E-mail Info section, type a Mobile PIN number into the field provided and then click Save at the bottom of your user profile.

Text Notifications

Text notifications can help you keep in touch with your customers through your XSite no matter where you are. By enabling them on your site, you'll immediately know when new loans have come in through your online loan app or when someone contacts you through your XSite's contact forms. To enable text notifications on your XSite...

1. From User Management, click a user out of the Site Users list on the left or click Add User to create a new account.

2. In the Login & E-mail Info section, type in your Mobile Phone Number and select your Mobile Provider from the list provided. If you can't find your mobile service provider in the list, send an e-mail to txtproviders@alamode.com and we'll do our best to integrate them into our mobile text message systems in the future.

3. Finally, check the box to Turn on TXT notifications to your mobile device at the bottom of the Login & E-mail Info section and click Save at the bottom of your user profile.

Mobile Orders

The convenience of the Internet has raised our expectations on response times. The public wants everything now, and your clients are no exception. Why make your clients wait until you're back in the office to accept orders? With your web-enabled Pocket PC or SmartPhone, you can acknowledge and manage any orders on your XSite from wherever you are.
1. From your XSite’s mobile tools, click **Orders** and you should see a list of status items followed by the number of orders that match that status.

2. Then, click **All Open Orders** or another category you wish to see.

3. When the order details appears, use the links in the order to set the orders status or schedule an inspection.
   - To set an order's status, click **Status**, select a status in the screen that appears, type any relevant notes on the change, and click **Save**.
   - To schedule an inspection, click **Schedule Inspection**, fill out the details of the appointment, and click **Save**.
   - To get a map and directions to the property, click **Map**, then click **Directions**, and click either **My Office** or **Other Address** to specify the starting point for your directions.

### Maps & Driving Directions

If you find yourself in need of a map or directions while you’re out on the road, your mobile XSite can provide you with a solution through Microsoft’s mapping system.

### Retrieving Maps

1. From your XSite’s mobile tools, click **Maps**.

2. Enter the address you want, and click **Find** to display the map on screen.

### Retrieving Directions

1. First, retrieve a map to the property using the steps above.

2. Then, click the **Directions** link below your map and..
   - Click **My Office** to get directions to the property you looked up starting from your office
   - Click **Other Address** to type out the address from which you want your directions to start.

Your XSite immediately returns directions to accompany your map. Just scroll through them for details on how to get to the property.
Hint: To get directions to a property related to an order, open the order through your mobile XSite and click Map and Directions from within the order.

Weather

Since many real estate professionals frequently find themselves on-the-go, it's often useful to have the day's forecast at your fingertips. XSites mobile provides a window in the day's forecast through the Weather button in your mobile My Office. To access weather click Weather in your XSite's mobile tools. Your XSite forwards you over to AccuWeather's website, displaying the weather for your local area (based on your office address). Since AccuWeather's site is fully outside of XSite control, contact AccuWeather for additional assistance with their weather tools.

Google Search

Your Mobile XSite has a convenient link to Google's mobile page to help you access a wealth of information through Google's robust search tools. To access Google through your mobile XSite...

1. From your XSite's mobile tools, click Search.
2. Your XSite forwards you to Google's own search page where you can type out your search and click Search for a full list of sites that can provide information.

Note: Since this page is completely under Google's control, it may change from time to time as they add new features. For an exhaustive list of instructions, visit Google's mobile help pages at http://services.google.com/surveys/mobile_search

Calendar & Contacts

Using the Calendar and Contact manager in your Mobile XSite, you can easily look up an appointment or contact information from anywhere you have Internet access.

Mobile Contacts

1. From your XSite's mobile tools, click Contacts.
2. A list of all contacts in your XSite appears.
   a. To open an existing contact for editing, click the contact's name.
   b. To add a new contact to your site, click Add. Then, fill out the new contact's details and click Save.
   c. To search for a contact in your address book, click Search and type out the contact's first name, last name, and/or company. Then, click Search.

Mobile Calendar

1. From your XSite's mobile tools, click Calendar.
2. A list of all your pending appointments and to-do items appears. Click any existing item to view it or click New to create a new appointment.
3. Edit any details about your appointment including any key times, meeting locations, meeting notes, and whether you want your XSite to send you a text
message or e-mail reminder prior to the meeting. Then, click **Save** to update your appointment.

**E-mail**

While many mobile devices, including many of today's SmartPhones and the iPhone, provide custom applications for managing e-mail, your mobile XSite provides you with a web-based version of your XSite's CertMail as well. To manage e-mail through your mobile XSite...

1. From your XSite's **mobile tools**, click **E-mail**.
2. When your Inbox loads...
   - Click an existing mail message to read, reply to, or otherwise manage it.
   - Click **Compose** to create a new e-mail message.
   - Click **Folders** to jump to a different folder in your CertMail Inbox.

**CertMail**

CertMail is a la mode's high-end e-mail service - designed to accompany our XSites. Just as XSites are more than mere web hosting CertMail goes way beyond simple e-mail messaging. Some added features include:

- Server-side virus protection and spam filtering
- SureReceipts feature that sends a guaranteed receipt no matter what e-mail client the recipient has.
- E-mail forwarding for each e-mail address
- A web interface, so you can access your e-mail from any Internet PC without installing software (as long as you have your password)
- Support for POP3, SMTP and IMAP protocols for use in Outlook or other e-mail clients.
- A web-based calendar and address book that are compatible with Outlook and many other real estate specific applications.

**Accessing Your CertMail**

There are two ways to access your CertMail account:

1. The primary (and easiest) way to access your CertMail account is by clicking the **CertMail** button in My Office.
2. Alternately, you can go to [http://www.certmail.com/](http://www.certmail.com/) and login manually by entering your entire CertMail e-mail address (including the "@" sign and domain) along with your **Password** and clicking **Login**.

**Configuring CertMail**

When you log into CertMail, you can control the way CertMail on the web behaves. To set your CertMail options...

1. From CertMail, click the **Options** icon in top toolbar.
2. Choose the number of messages to display on-screen using the drop-down menu at the top of the screen.
3. Indicate whether you want to view the message "preview" pane to view e-mail messages without opening them.
4. Select your time zone and daylight savings adjustment from the drop-down menus.

5. As desired, add your e-mail signature block, mail forwarding settings, anti-spam preferences, or set up an Out of Office notice.

**Enabling SPAM Filters**

To configure your CertMail SPAM blocker...

1. From CertMail, click Options in the top toolbar.
2. Scroll down to the Manage Your SPAM Settings section.
3. Select Yes from the Enable SPAM Filtering drop-down menu.
4. Select your SPAM filtering preference from the When Blocked Senders Send E-mail drop-down menu. Options are:
   - If you want to reject e-mail from any sender you’ve blocked, but also send a notice of the rejection, select the Reject E-mail option.
   - If you want to simply want to delete e-mail sent from senders you’ve blocked, select the Permanently Delete option.
   - If you’d prefer to have SPAM sent to a specific SPAM folder where you can sift through the messages later to ensure that no messages were incorrectly marked as SPAM, mark Move E-mail to SPAM Folder option.
5. When finished, click Save (at the top of the screen) to apply your changes.

**Note**: When you enable spam filtering for CertMail, CertMail automatically deletes any messages that are flagged as spam within 5 days after they are received.

**Whitelisting & Blacklisting**

CertMail’s SPAM filtering tools provide you with a way to block all e-mail from a particular domain or e-mail address. Of course, if you need to ensure that e-mail from your associates always makes it through, you also have access to a "whitelist" you can edit. To add someone to your safe or blocked sender list...

1. From CertMail, click Options in the top toolbar.
2. Scroll down to the Manage Your SPAM Settings section.
3. Type the specific e-mail or domain name you want to block in the Blocked Sender box. If you enter an e-mail address (badguy@spamsender.com), any mail received from that specific address will be blocked. If
you add a domain name (spamsender.com) then e-mail from anybody using that domain name is blocked. Then, click **Add** to put it into the list and repeat these steps for any other e-mails you need to block.

4. Type the specific e-mail or domain name you want to permit in the **Safe Sender** box. If you enter an e-mail address (goodguy@myfriends.com), any mail received from that specific address will be permitted. If you add a domain name (myfriends.com) then e-mail from anybody using that domain name is permitted. Then, click **Add** to put it into the list and repeat these steps for any other e-mails you need to permit.

5. When finished, click **Save** (at the top of the screen) to apply your changes.

### Forwarding E-mail

Each of your CertMail accounts can have a list of other e-mail addresses to which it can forward a copy of its messages. This is handy in cases where your e-mail client is already setup to read mail from one service and you don't wish reconfigure it. To setup e-mail forwarding through CertMail...

1. From **CertMail**, click the **Options** icon in the toolbar.
2. Scroll down to the **Mail Forwarding Options** section of the page.
3. In the **Forward to** box, type an e-mail address to which you want to forward your CertMail messages and click **Add**.
4. Repeat step 3 for other e-mail addresses you want to receive your forwarded messages.

5. Mark whether or not you want a copy of the forwarded messages saved on the CertMail server. If you don't plan on accessing your CertMail account directly from the web client or tying CertMail into your e-mail program, be sure want to mark this option.

6. Then, click **Save** (at the top of the screen) when you are through.

**Note:** When you enable e-mail forwarding inside CertMail, CertMail automatically deletes any messages within 7 days after they are forwarded.

### Removing Forwarding Addresses

If you no longer wish to have messages automatically forwarded to any or all of the accounts you previously entered, you can easily remove e-mail forwarding. To remove e-mail forwarding...

1. In **CertMail**, click the **Options** icon in the toolbar.
2. Scroll down to the **E-mail Forwarding Options** section of the page.
3. Click the address you wish to remove, then click **Remove**.
4. Repeat this for other addresses that may be listed.
5. Click **Save** (at the top of the screen) when you are through.
**E-mail Signatures**

Instead of having to type your name and other information at the bottom of each message, you can setup a default "footer".

1. From CertMail, click the Options icon in top toolbar.
2. In the Configure Your E-mail Signature section, set the Append Signature to New Messages option to Yes.
3. Then, in the Signature field, type your desired e-mail signature. Commonly, this is your name, title, etc.
4. Click Save (at the top of the screen) when finished to apply your changes.

**Out of Office Notices**

If you're planning a vacation or road trip that will take you away from your business for some period of time, you can set CertMail up to automatically respond to any e-mail you receive with an out of office notice. To do so...

1. From CertMail, click the Options icon in the toolbar.
2. Scroll down to the Out of Office Configuration section.
3. Type the body of the message you want to use as your out-of-office notification into the Text to include box.
4. Type or select Start and End dates and then set the Enable Out of Office Auto Response setting to Yes.
5. Click Save (at the top of the screen) when finished to apply your changes.

**Creating Accounts**

Initially, your CertMail service has one account created based on the contact information in your administrator account. Depending upon the level and type of XSite you purchased, you may have several more accounts available. Since CertMail accounts are directly tied to user accounts, you need only create a new user account to create a new CertMail account as well. For specific details about creating user accounts, see the User Management section of this user's guide.

**CertMail Online**

CertMail's interactive online service allows you create and manage your e-mail messages with the same functions you've come to expect in your desktop e-mail program. In addition, CertMail online comes with direct integration into your XSellerate automated marketing system and an advanced spam blocker that can prevent spam from ever making it into your mailbox. You can access CertMail Online in a few different ways:

- Set up your CertMail account inside of Outlook or another e-mail program.
- Click the CertMail button in the top toolbar of your XSite admin.
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- Go to http://www.certmail.com/ and log in manually with your CertMail e-mail address and Password. Then, click Login.

Composing Messages

To send an e-mail from CertMail on the web...
1. In CertMail, click Compose.
2. Enter the recipient in the "To" field. You can separate multiple recipients with a semi-colon.
3. Enter any e-mail addresses you want to "carbon copy" (CC) or "blind carbon copy" (BCC).
4. Type a subject line for your e-mail.
5. If you need to attach a file, click Add File. Then, click Browse and find the file you wish to attach to the message and click OK.

   Note: To ensure the speed, reliability and security of CertMail, we do limit your message to 25 MB in total size. Typically if you need to transfer a file of more significant size, you would need to find an alternate method then e-mail anyways as your recipients may not be able to receive a file of such magnitude.

6. Type your message using the word processor style interface provided. If you don’t have time to finish the message, click Save to Drafts to place it in your CertMail Drafts folder.
7. If necessary, use the Importance drop-down menu to indicate the significance of the message.
8. Click Send when finished to deliver your e-mail.

Sending Individual Ads

If you have the XSellerate Marketing system, you have the ability to send a standalone ad from your Ad Library through WebMail. To send a standalone ad...
1. From CertMail, click Compose in the toolbar.
2. Add a subject line and recipients as usual.
3. Click the User XSellerate Content link above the main Body text box.
4. When the Ad Library appears, find the ad you wish to send.

   Note: For more information about how to find and filter ads, see the Ad Library section of your XSellerate user guide.
5. Click to select it and click Add to mail message to insert the ad into the body of your e-mail.
6. Add any additional text or information as necessary and click **Send** when finished to deliver your ad.

**Managing Folders & Messages**

The CertMail WebMail client offers much of the functionality you'd find in a standard desktop e-mail client. You can have as many folders as you like with nested subfolders. Categorizing messages into folders makes them easier to find and helps.

**Creating Folders**

1. In **CertMail**, click the "parent" of the folder. For example, if you wanted the folder to be a subfolder of your **Inbox**, click **Inbox**. If you want it on the same level as your **Inbox**, click the item for "Mailbox" followed by your account name.
2. Click **New**.
3. Type the name for the folder.
4. Then, click **Save**.

**Message View Tips**

- You can sort your list by clicking a column heading.
- When selecting messages to move or copy to another folder, you can select a block of messages by clicking the first one in the block and then using **Shift + Click** to get the last one in the block. All messages in between those will be selected.

- Select multiple non-sequential messages with **Ctrl + Click**. This means highlighted messages remain selected when you click others.
- The **Refresh** button above your message list checks for new messages sent since you first logged into your mailbox.
- Instead of reading messages in the preview pane, you can double click them and reveal functions such as printing and a quick way to add the sender to your address book.

**Flagging SPAM**

CertMail's SPAM filtering tools offer a dual layer of protection to help safeguard your mailbox from the increasing volleys of SPAM on the Internet. In order to use these measures, you must first enable our server-side SPAM filtering system on your account. Once you've done that, there are two ways to combat spam:

- Flagging individual messages as spam
- Whitelisting and blacklisting e-mail addresses

**Flagging Individual Messages**

Spammers regularly adapt their techniques to maximize the amount of junk e-mail they can get into your mailbox. Because of this, it's difficult to block all of the spam that comes to your inbox through traditional whitelisting and blacklisting. But in the last few years, anti-spam techniques have also evolved, allowing us to provide you with the most effective anti-spam technology to date. As you use CertMail, you have the ability to flag any message as spam. And
every time you mark a message as spam, it's flagged in our global spam database so that similar spam messages do not make it to any CertMail inbox again. As more and more CertMail users begin flagging spam, less and less spam actually makes it through to all CertMail accounts. To flag a message as a spam message...

1. From the CertMail Online, click to select the message you wish to flag as spam.
2. Click the Spam link above the message grid to flag the message as spam and send it to your Spam box.

Whitelisting & Blacklisting E-mail Addresses

1. From the CertMail Online, right-click a message from the safe/blocked sender.
2. From the menu that appears, click Add to Blocked Senders List or Add to Safe Senders List.

Using SureReceipts

SureReceipts allows you to get a true delivery receipt for messages you send through WebMail. Unlike receipts built into programs like Microsoft Outlook, SureReceipts doesn't depend on the recipient using Outlook or confirming that they want to send your receipt. As an added bonus, the delivery mechanism built into SureReceipts overcomes common file-size limitations with attachments, so you can send any size files you want. To send a message via SureReceipts...

1. From CertMail Online, click Compose.
2. Fill out the recipient's e-mail, the subject line and everything else as you normally would.
3. Add attachments if needed as well.
4. Now, click the option for Deliver using SureReceipts.
5. Then, click Send.

For you, it's like sending a regular e-mail message. However, your recipient sees something a little different when your message arrives. They won't see your text or attachments. Instead, they get a notification that a message is waiting for them and a hyperlink to click. Once they click the link, they are taken to a message pickup area on our CertMail server. And you are sent a "receipt" back in e-mail. Then, the page they see has your message on it in addition to individual links for each of the attachments. When the recipient clicks each of the attachments you receive additional delivery receipts indicating that they have received each of your attachments.

E-mail Clients

Our CertMail servers are just as powerful, if not more powerful than what your ISP would provide - especially considering we pre-scan your e-mail for viruses. In addition, CertMail supports both POP3 and IMAP...
configurations in your e-mail client. Here are some advantages to using IMAP over POP3 for connecting to CertMail.

- With POP3, your messages are downloaded and typically erased from our server. That means that two computers shouldn't access the same account, and if something should happen to a PC downloading the messages, they would all be gone. Of course, if you configure your POP3 setup via our specifications, you need not worry about this as we recommend that you leave a copy of each e-mail message on our servers as a backup.

- The more modern IMAP saves the messages on our server - you can access them from multiple PC's or use our web interface. You can even add and manage folders for your messages on the server. This is often important for real estate professionals who are often on the go and using multiple computers.

Depending on your e-mail client, there are different settings for configuring it for CertMail via IMAP and POP3. To facilitate this process, we have developed an account configuration wizard that will automatically setup your Outlook account for you, but you can also set up your account manually if you wish.

**Automatic E-mail Client Setup**

To set up your CertMail account in Outlook automatically.

1. In CertMail, click **Options**.
2. Scroll down to the bottom of the screen and click the **Mail Client Configuration Wizard** link.

**Note:** If you're using a dial-up Internet connection, you will need the name of that connection before you continue. To determine the name of your dial-up Internet connection, click **Start, Control Panel** (or **Start, Settings, Control Panel** if you don't find it in the main menu.). Then, find and click **Network Connections** to view a list of connections on your computer. Just find your dial-up connection in the list and write down the name of that connection.

3. When the Mail Client Configuration Wizard appears, mark the option that corresponds with how you connect to the Internet. Options are:
   - **Local Area Network (LAN)** - Use this option if you have a high speed Internet connection like a cable or DSL modem.
   - **Use Phone Line** - Use this option if you dial up to the Internet.
   - **Use Internet Explorer's Dialer** - Some dial-up Internet providers require you to connect to their services via Internet Explorer rather than the typical Windows dial up connection. While this is less common, if you know this is the case with your provider, you should mark this option.
   - **Use Phone Line if LAN Unavailable** - This option is best suited for those who have a laptop as their primary computer and are frequently on-the-go. Specifically, if you usually have a high speed Internet connection (like at the office) and you dial up to the Internet whenever you're away from that connection (like at home) you'd want to mark this option.
4. Next, choose the version of Outlook you want to configure for CertMail. If you are unsure which version of Outlook you are using, you can always open Outlook and click Help, About to find the version information. If you do not have a full version of Outlook, choose Outlook Express as it is the free version that comes with every copy of Windows.

5. Finally, mark the option for either an IMAP setup or POP3 setup. An IMAP setup is ideal for those who always use a high speed connection to the Internet. It was designed for high speed connections and has a broader set of features and functionality than POP3. A POP3 setup was designed for dial up Internet connections, but due to its age, it often proves to be the more stable of the two technologies. If you're using a laptop and are frequently on-the-go or if you have a dial-up or satellite Internet connection, this is your best option. If you have a high speed connection and have experienced problems using IMAP, POP3 may alleviate some of those problems.

6. Click Create to create your e-mail account setup file.

7. Click OK in the message that appears.

8. If you chose Outlook Express, you will be prompted about whether you want to Run or Save the file. Click Run and then click Yes to verify that you want to add the information to the registry. If you chose any other version of Outlook you will be prompted about whether you want to Open or Save the file. Click Open and then click OK to continue.

9. If you chose Outlook Express, additional messages may also appear, just click OK to continue.

10. When the final message has been confirmed, your Outlook setup is complete. Just close the small window with setup information and open your copy of Outlook to access your CertMail.

**Manual E-mail Client Setup**

If you'd prefer to set up Outlook by hand, we have a document that will assist you in making the right setup choices for your needs and help walk you through the setup for your version of Outlook. Just visit the link below and select your preferred setup method and your version of Outlook.

http://help.alamode.com/docs/certmail/

**Usage Reports**

The Mailbox Details pane shows you, at a glance, how much space you're using. To use it:

1. In CertMail Online, look for the Mailbox Details pane on the left side of your mailbox.

2. Each section in this pane should outline how much space you're currently using or currently have remaining in...
your CertMail account. For a full report of your account details and ways to purchase additional CertMail accounts or storage space, click More Info.

1. In the More Info report, review the details of your account. In addition to the basic overview of your account, you can do a variety of other things. Options are:
   o Purchase additional CertMail storage space by clicking the icon to order more.
   o Purchase additional CertMail accounts by clicking the icon to order additional CertMail accounts.

Contacts

Your complete address book can be stored online with Contacts in your XSite and CertMail. Like the rest of your XSite, it only takes a browser to access it. You should find the contacts easy and intuitive to use and also enjoy features like being able to store company information so it doesn't have to be retyped for each contact in one office as well as being able to group contacts into categories you setup yourself.

If you're accessing contacts through your XSite, just click Contacts in the toolbar at the top. Otherwise you can also access them through CertMail's WebMail interface.

After logging into your XSite, just click Contacts in the toolbar at the top to get to your address book.

Each account you create gets its own list of contacts so if you need to keep them separate, you're equipped to do so.

Creating Contacts

Having an address book naturally keeps you from having to retype e-mail addresses. Plus, the contacts you add integrate with our other products and features that rely on an address book. To add a contact...

1. In the contact manager, click Add and then click Add Contact in the menu.

2. Expand each section of the contact details by clicking the arrow to the right of each header. Available sections are:
   o Contact Information - Basic information about the individual.
   o Type of Contact - The contact's function or role.
   o Phone Numbers - Various types of contact numbers.
   o Street Addresses
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- **Online Addresses** - Various contact e-mail addresses.
- **Licenses and Certification** - Any relevant license/certification information you need to store in the contact.
- **Groups** - Custom contact groups. See the Creating Contact Groups section of this user’s guide for more details.
- **Notes** - Room for any important information you want to store about your contact.

3. Then, enter any necessary information into the fields provided. Depending on which contact information you edit, you may have other options presented to you.

- In the **Contact Information** section, you can create and edit new company contacts by clicking **New** or **Edit** beside the **Company** drop-down menu.

- In the **Street Addresses** section, you can set the address you enter to double as the mailing address by checking the box for that option.

- In the **Online Addresses** section, make sure to designate which e-mail account you plan to use to correspond with the contact by default. Just mark **Primary** option beside the desired default contact address.

- In the **Groups** section, click **Add** to create a new group or click **Manage Groups** to call up the group manager.

- In the **Notes** section, click **Add** or **Edit** to outline important notes about the contact. In order to use this feature, you must first save the contact.

- In the **License and Certification** section, click **Add** or **Edit** to enter additional license/certification information about your new contact. In order to use this feature, you must first save the contact.

4. When you’re finished editing your contact, click **Save** to apply your changes.

**Importing Contacts**

Importing your contacts from your existing contact manager or e-mail program saves you time from typing these into contacts manually. Most people should probably only need to run the import one time when they initially get started with their contacts database. In order to use the contact import tool, you must first export your contacts from your local contact management system into a .CSV file. The exact process for your contact management application may vary from our documentation on these processes so you should consult your software's user's guide for exact instructions. For convenience, though, we've outlined the correct processes for the following programs.

- **Outlook**
- **Outlook Express**
- **Top Producer 7i**
- **ACT 6**

Once you've generated the CSV export file from your contact management software, you can import it directly into your contact manager. To do so...
1. In the contact manager, click **Tools, Contact Import**.

2. In the screen that appears, indicate the source of your contacts. Options are:
   - Outlook
   - Top Producer 7i
   - Excel Comma Separated File (.CSV)

   **Note**: If your contact program is not listed, you'll need to create a .CSV file containing your contacts using your contact management program and then make some adjustments to that file in order to import it. For details on this process, see the Importing CSV Files section of this user's guide.

3. Click **Browse** and browse out to the location of your contacts .CSV file. When you find it, click **Open** to open it.

4. Finally, click **Import** to import your contacts. When the process is complete, you receive a list of all contacts which were successfully imported. Just click **Close** to close the window.

If you want to import additional contacts, repeat the steps above. Once you've imported the contacts, you may want to go back and edit each contact, update their information and assign them to additional groups.

**Importing CSV Files**

The Contact Import tool can import contacts from any application that can export information to a "Comma Separated Value" (CSV) file. This includes most e-mail applications, contact managers and a host of other programs. The exact process may vary dramatically from one program to the next, but the general process is as follows.

1. Export your contacts from your preferred contact management software program into a Comma Separated Value (.CSV) format.

2. Edit that .CSV file and change the column headings for the data you wish to import to one of those contained in the following list. Most programs name their column headings in a similar fashion so just choose the best option from the provided list below to match to each column heading. As you edit your .CSV file, keep the following items in mind.
   - You do not have to use ALL of the following column headings. In fact, your .CSV file may not have all of the information described by the headings below.
   - There may be columns in your .CSV file that don't match any of the following headings. Your contact manager's import tool won't be able to import data in those columns so leave those headings as they are.
The order in which the headings appear in the .CSV file doesn't matter. If the column headings in your .CSV file appear in a different order than that listed below, leave them in the order in which they appear.

The column headings and contact information types that your contact import tool can currently accept are:

- FirstName
- LastName
- MiddleName
- JobTitle
- Company
- Suffix
- Title
- HomeAddress1
- HomeAddress2
- HomeCity
- HomeState
- HomeZip
- HomeCountry
- BusinessAddress1
- BusinessAddress2
- BusinessCity
- BusinessState
- Fax
- BusinessZip
- BusinessCountry
- HomeEmail
- HomeEmailDisplayName
- BusinessEmail
- BusinessEmailDisplayName
- MobileDeviceEmail
- MobileDeviceEmailDisplayName
- HomePhone
- BusinessPhone
- CellPhone
- Notes

Exporting Contacts

As you might suspect, exporting contacts works just the reverse of importing them.

1. In the contact manager, click Tools, Contact Export from the menus.

2. From the list provided indicate which program you intend to use to import this contact data once you've created an export file from your contact manager. Options are:
   - Outlook Express
   - Outlook 2000
   - Outlook XP (2002)
   - Outlook 2003
   - Outlook 2007
   - Top Producer 7i
   - Excel Comma Separated File (.CSV)

3. Click Export to create the export file.

4. Your site creates a file in the format you requested and offers it to you to Open or Save. Save the file to a folder on your computer. For ease of access, you might consider saving the file to your desktop.

Once you have a copy of the exported file on your computer, you can readily import it into any other local
contact manager. For exact details on that process, refer to the manual included with that software package.

**Deleting Contacts**

To delete contacts from your database...

1. In the contact manager, check the box beside each contact you wish to delete
2. Click **Delete** in the toolbar, to delete your contacts.

**Permanently Deleting Contacts**

When you delete a contact using this method, it's actually placed into a "holding area." This allows you to retrieve deleted contacts in case you make a mistake. To permanently remove a contact from your database...

1. In the contact manager, click the View menu and then select **Deleted Contacts**.
2. Select the contacts you want to purge from your database and click **Delete**.

**Restoring Deleted Contacts**

To restore any contacts you've mistakenly deleted...

1. In the contact manager, click the View menu and select **Deleted Contacts**.
2. Select any contact from the list.
   - Hold down the Ctrl key on your keyboard and click each of the contacts you want to restore
   - Or, hold down the Shift key and click the top and bottom contact in a sequential range to select the entire group of contacts in between.
3. Click **Undelete** to restore your contacts.

**Organizing Contacts**

At times you may find it necessary to update an entire batch of contacts at once. For just such occasions, we've added a tool in your contact manager that allows you to modify a group of contacts you specify. To apply changes to a batch of contacts...

1. In the contact manager, select the contacts you wish to edit by checking the box beside each.
2. Click **Edit** in the toolbar.
3. Then, in the **Edit Contacts** window, apply the changes you want to make across the selected contacts. Options are:
   - **Assign Contact(s) to a Company** - Changes the company listed for each of the selected contacts to the one you choose.
   - **Update Contact(s) As** - Allows you to flag the contacts as either public or private.
   - **Assign Contacts to Groups** - Allows you to add the selected contacts into a series of custom groups. To create additional custom groups, click **Manage Groups**.
   - **Assign Your Contacts to Contact Types** - Allows you to add the selected contacts into the series of pre-defined contact types that came with your site.
4. Click **Save** when finished to apply your changes.
Creating Contact Groups

When you enter or edit a contact, you're able to assign that contact to groups. This allows you to direct your future marketing campaigns to a whole group of contacts that meet certain criteria. A contact can be a member of several groups, allowing you to fine-tune your marketing efforts for maximum impact. To build and manage your groups...

1. In the contact manager, click **Tools**.

2. Then, click **Group Management**. From here you can...
   
   o Click **New** and type a name for your group to create a new group.
   
   o Change a group name by clicking it, typing a new name into the **Edit Group Name** box, and clicking **Save**.
   
   o Delete a group by clicking it and then clicking **Delete**.

3. Click **Close** when finished to return to the contact manager.

   **Note**: Unlike contacts, groups cannot be made public, if you wish to filter your contacts by group using the **Groups** drop-down menu in the Contacts view, you first need to switch to the My Contacts view as outlined in the Finding Contacts section of this user guide.

Merging Contacts

As you continue to add and manage contacts through your site, you may occasionally find that you've entered the same contact more than once. To keep a clean list of contact information, your contact manager comes equipped with a contact consolidation tool that you can use to merge the contact data from all of your duplicate contacts into individual contacts. To use it...

1. In the contact manager, click **View, Duplicate Contacts**.

2. Click to select a contact that you wish consolidate with its duplicates.

3. Click **Consolidate** in the toolbar.

4. A list of all the possible duplicates of that contact appears. Check the box beside each contact you wish to consolidate into the contact you selected.

5. Click **Save** to apply the consolidation.

   Each of the contacts you've marked is consolidated into the main contact which you left blank. Repeat this process until you've consolidated all of your duplicate contacts.

Sharing Contacts

Your contact manager gives you the ability to share any of your private contacts with other users in your account. If you need to share contact information from your private contacts list with another user...

1. In the contact manager, click **View, My Contacts** in the toolbar.
2. Check the contact(s) that you want to share with another user.

3. Click **Tools, Move/Copy Contact(s)** in the toolbar.

4. When the **Move/Copy Contacts** screen appears, verify that all of the contacts you wish to share are shown in the list.

5. If you want to give complete control over these contacts to the new owner, mark the **Move Contact(s)** option. If you just want to share your current contact information with the other user, mark **Copy Contact(s)**.

6. Finally, select the user you with whom you intend to share/give these contacts from the **To New Owner** drop-down list.

7. Click **Save** to apply your changes.

### Finding Contacts

As you add contacts to your contact manager, it quickly becomes important to have a variety of ways you can use to find the right contact at the right time. The contact manager provides several ways you can use to find the contacts you need.

#### Searching for Contacts

To search through your contacts...

1. In the **contact manager**, type a search term in the **Search For** box.

2. Select an item to search through from the drop-down menu beside the **Search For** box. For instance, if you typed the last name into the **Search For** box, you would select **Last Name** from the drop-down menu.

3. Click **Find** to search your contacts for the typed phrase.

#### Filtering Contacts

To filter your contacts to those that meet certain criteria...

1. In the **contact manager**, decide how you want to filter your contacts. Options are:
2. To apply a Type or Group filter, just select the Group or Type you want to work with from the appropriate Filters list to the upper right of your contact manager. To apply a name filter, just click the letter of the contact's last name (or company name if you’re working in company view) in the top toolbar.

3. When you're finished working with the current filtered set of contacts, return to your full contact list by clicking View All Contacts in the Contacts toolbar at the top of the screen.

Applying Contact Views

The last way you can find contacts is by applying contact views. While contact views are similar to contact filters in that they limit the list of contacts to those that fit certain criteria, they also provide additional functionality that is unavailable in other contact views. To apply a contact view...

1. In the contact manager, decide which contact view you want to apply. Options are:
   - The My Contacts view shows all of your contacts in alphabetical order, including their Last name, First name, Company, E-mail address and phone number. You can use the Options button to select which phone number is displayed in this view.
   - The My Companies view shows all of your contacts grouped by the name of their company. Companies that have entries will have a plus sign (+) next them. Click the plus sign (+) to expand the company and see contacts associated with it.
   - All Public Contacts shows all contacts that are marked as Public contacts whether they are contacts in your account or other accounts on your website.
   - All Public Companies shows all companies marked as Public companies whether they are your companies or companies in other accounts on your website.
   - The New Contacts view only shows those contacts that have been recently added to your database, whether you entered them manually, or their data was captured from your site. How long a contact appears as "new" is controlled in the Options.
   - Deleted Contacts and Deleted Companies show you just that - contacts and companies that have been flagged to delete.
   - Unsubscribed Contacts shows you a list of contacts that have indicated they want to unsubscribe from your mailing lists.
   - If you are the administrator of your site, you can see a fourth view option. The Lead Management view shows all of the new contacts that are included in any of your users' databases. This allows you to manage new contacts as your employees enter them to ensure that they're being followed up on properly.
   - Duplicate Contacts shows you a list of all contacts for which there are probable finds duplicates. You can use this tool to ensure that you don't have unnecessary data in your contacts list.
2. Once you've selected an appropriate view, click the View menu and select your desired contact view.

3. Any additional functions that apply to the current view appear in the Tools menu. Use those functions or apply changes as necessary.

4. When finished selecting contacts, return to the "All Contacts" view by clicking View All Contacts in the Contacts toolbar at the top of the screen.

Printing Contact Labels

Your contact manager is equipped with a variety of tools to help you find, manage, and use the contacts you store. The print labels tool built into your contact manager can help you quickly and easily create mailing labels for a basic print mailing. To print contact labels...

1. In the contact manager, find the contact or contacts for which you wish to print labels. To speed up the process you use to find your contacts, consider using your contact manager's filtering and searching features.

2. Check the box beside each contact for which you wish to print labels.

3. When finished selecting contacts, click Tools, Print Labels.

4. In the Print Labels window, you can:
   - Choose the type of Avery® labels on which you want to print using the drop-down menu.
   - Require that the contact contains a full mailing address to print a label for it so that you don't print labels you can't use for mailings.
   - Print a custom label instead of labels from contacts
   - Force the label printer to print a full sheet of your custom labels
   - Choose the starting label on your label sheet by clicking the corresponding cell in the preview page above the Preview Labels button.

5. When you're ready to print your labels, just click the Print icon in the Label Preview pane to send them to the printer.
Contact Options

Your contact manager comes with a built-in option control that can help you tailor your contact management experience to your needs. To use it...

1. In the contact manager, click **Tools, Options** from the menus.

2. In the list of options provided, mark your preferences. Options are:
   - **Mark contacts entered within the last # days as "new"** - Use this option to define your view of what constitutes a new contact based on the length of time in days that it has been in your contact manager.
   - **Show # records at a time** - Use this setting to control how many contacts appear on screen at one time as you work in your contact manager. The default is 25 contacts per page.
   - **Display the contact's --- phone number in the grid** - The contact manager readily stores several different contact phone numbers to help you keep track of the often numerous ways you can get in touch with your contact. This setting allows you to set a "preferred" phone number in the contact overview screen so that you do not have to open each contact to see the phone numbers you need.
   - **Contact details expanded by default** - When you edit a contact, the editing area is divided up into several sections. By default, only the basic contact information is visible, requiring you to click and expand sections that contain other information. If you want to simplify the process of editing contacts, you can eliminate the section-expansion step by checking the box beside each section you want to be open by default.

3. When finished, click **Save** to apply your changes.

Scheduling

The schedule and calendar in your XSite provide an online appointment manager that you can easily access anywhere there's an Internet connection. Instead of having to use a separate program to track these items, you can do it all through your online scheduling tools and tie in with appointment related features in our XSites and desktop applications. To access your schedule click **Schedule** in My Office.

Creating Appointments

You can easily add appointments and activities such as inspections, showings, client meetings, and due dates through your site. To schedule a new appointment...

1. From your schedule, click **New Appointment** in the top toolbar.

2. Type a name for your appointment in the **Subject** field.

3. Enter your **Start** and **End** times using the fields provided and indicate whether this is an **All Day Event** using the box to the right.

4. Indicate whether you wish to receive an **E-mail** or **Cell Phone** reminder and indicate how much lead time you want prior to the event using the Reminder **Time** drop-down box.
Note: Cell Phone reminders require that you've supplied your cell phone number and provider in your user profile. See the User Management section of this user guide for more information.

5. Choose an activity type from the Show Time As drop-down menu.

6. If necessary, type any notes that apply to your new appointment in the available Description box.

7. If you need to send e-mail reminders to other parties as well as to yourself, click the Advanced Options link at the bottom of the screen and check the Notify others by e-mail box.

8. Type the e-mail address(es) of the individuals you wish to send reminders to using the box provided.

9. Alternately, if you have the contacts in your database, just click their names in the list at the bottom and click the right arrow to add their contact to the appointment.

10. Click Save when finished to save your new appointment.

Managing Your Schedule

From the full view of your schedule, you can find appointments and schedule new appointments easily.

- To switch to a daily, weekly, work weekly, or monthly view, click the tabs above the calendar.
- You can switch to the next month (or week or week or day) using the horizontal arrows at the top of the calendars to the left.
- Create a new appointment by clicking New Appointment in the top toolbar.
Importing/Exporting Your Schedule

If you've been keeping a schedule in a different application, you can transfer appointments and tasks to and from your online schedule. Here’s how to import appointments:

1. In the contact manager, and then click Tools, Schedule Import / Export.
2. Select the Import method and either Activity or Task for your type.
3. In most programs, "Activities" are like appointments with a definite start/stop time and often a way to mark you as busy. "Tasks" are more like a To-Do list with a due date and schedule. XSites scheduling presently handles activities and tasks in the same manner.
4. Click the drop-down menu and choose the program from which you are importing. Depending on the program you choose, different instructions will appear in the "Help" part of the screen to assist you with specifics.
5. Click Get Data and the possible entries are first displayed on the right. Mark the ones you wish to copy into your online schedule (or use Select All) and then click Import.

Note: If you're using Microsoft Outlook 2003, you may be warned that a program is trying to access your e-mail addresses. This is, of course, what the import function is doing. To continue, click the Allow access for check box, then select 10 minutes from the drop-down menu and click Yes.

Exporting activities from your online schedule works in reverse of importing.

1. After clicking Import/Export, mark the Export option.
2. Change the type to Activity.
3. You should be presented with the Activities in your schedule. Mark the ones you wish to copy to your 3rd party scheduling program.
4. Then, click Export. All the items you marked are then copied directly into your other scheduler.

If you use a 3rd party contacts program not directly supported our online scheduling tools, try using the Excel option as your Destination format. It is likely that your program includes features to read from this common format.