MoreSolds.com Beta 2.0 Release Notes
User Guide to New Features

New Scheduling Feature:

NEW Calendar: We have added a fully integrated calendar with complete scheduling tools, tasks/to-dos and automated email reminders. The new calendar features month, week and day views. You can also see a complete list of all upcoming birthdays for your contacts.
Calendar Entries:

1. Click on **Calendar** tab.
2. To schedule a task, click in the middle in a date box.
3. Complete the **Task** details to create a task.
4. If this is a recurring task – click the **Recurrence** tab and select options.
5. Click **Save**.

ALL TASKS – click on the **ALL TASKS** tab to view all the tasks for all contacts.

BIRTHDAYS – click on the **BIRTHDAYS** tab to see all birthdays for all contacts.

New Listings Feature:

NEW Listings Section: Now you can click and view all of your listings in a single area and track commissions payable.
To view **Listings** Section:

1. Click **Listings** tab
2. Select your preferred options from the various pull down menus.
3. Click **Go**.

New Contacts Features:

NEW Customizable fields in Contacts: Now you can customize your Contact Types, Contact Status and Contact Groups. You can add/delete/edit these fields at any time. (Used by Account Owner Only)

- **See My Settings Section below**

NEW **Additional Fields**: Subscribers now have the ability to add 10 additional customizable fields in a contact record. These fields allow you to further personalize your MoreSolds experience. (Used by Account Owner Only)

- **See My Settings Section below**

NEW **Bulk Editing**: Edit, Delete or Modify multiple contacts with a few simple clicks. To access this section, click **Bulk Edit** in the **Other** section of the left navigation pane.

1. To find the contacts you want to bulk edit, fill in the criteria to perform the search. Note: to save this search for future use, click **Save Search**.
2. Click the **Search** button.
3. Select the contacts you want to bulk edit.
4. Click the **Continue** button to perform a bulk edit. NOTE: to delete the selected contacts, click **Bulk Delete**.
5. Select your preferred **Bulk Edit** options.
6. Select **Save**

Update

NEW **Mass Email via Outlook:** You can now send a mass email to your contacts with a few simple clicks. To access this feature, click **Bulk Edit** in the **Other** section of the left navigation pane. **Note:** At this time you can not mass email any Email Templates (or Email Campaigns) via the Email Campaigns module. This feature will be added at a later date.

1. To find the contacts you want to mass email, fill in the criteria to perform the search. Note: to save this search for future use, click **Save Search**.
2. Click the **Search** button.
3. Select the contacts you want to mass email.
4. Click the **Mass Email via Outlook** link at the bottom of the screen.
5. This will open an email window in MS Outlook.
6. Fill in the Subject and Text you want to send to your contacts.
7. Click the **Send** button.

NEW **Smart Search Feature**: Now searching for contacts is easier than ever.

1. Click **CONTACTS** tab.
2. Begin typing contact's last name
3. Select desired contact from list of names.
4. Select **go** button.

NEW **Larger Contact Window**: The **CONTACTS** window is now completely customizable and almost twice as large.
You can decide what columns to show and the default sort order. (Used by Account Owner Only)

- **See My Settings Section below**

NEW **Quick Lookup**: Now you can lookup a contact based on contact type, group or status. Also, you can select to lookup the info in the contact record or the listing details section.

At the top of the left side navigation bar, you will find the **Quick Lookup** section. Here you can locate a contact by keyword search, contact type, contact status or contact group. In addition you have the option of searching in **Contacts** or **Listings**.

- **Keyword Search** – you can use this search to find a contact quickly by any one of a variety or parameters, such as last name, first name, or street name.
- **Contact Type, Contact Status, Contact Group** – you can further narrow your search by selecting any of these options.

NEW **Add Photo**: Easily upload a photo of your contacts. You can do this when you add or edit a contact.

NEW **Rating System**: Create your own rating system and rate your contacts between 1 to 5 stars. You can also search for contacts based on their rating. You can do this when you add or edit a contact.

New Printing Features:

NEW **Print Labels**: Point and click to print labels in a variety of Avery label formats. You can print labels for multiple contacts or for a single contact. Also, you can print the starting label from any position on the label sheet to prevent waste. To access this section, click **Print Labels** in the **Other** section of the left navigation pane.

1. To find the contacts you want to print labels for, fill in the criteria to perform the search. Note: to save this search for future use, click **Save Search**.
2. Click the **Search** button.
3. Select the contacts you want to print labels for.
4. Click the **Continue** button to perform create labels for contacts selected.
5. Follow the step-by-step instructions to format labels.
6. Click **Prepare Labels** – (a PDF of the prepared labels will open in separate window).
7. Click print.

NEW **Print Contact Sheet**: Click and print a customizable contact sheet with the info you specify including contact details, listing details, tasks, notes and a Google map.

1. Select contact you want to print.
2. Click **Print Contact Sheet** button.
3. Select from options available.
4. Click **Print** button.

NEW **Email Opt-Out feature**: Contacts can now click to Opt-Out of email mailings which will greatly reduce spam complaints. When a contact clicks the email Opt-Out link in an email they receive, this selection will automatically update in our MoreSolds contact record. Alternately, you can manually select the option for a contact. This feature is visible when you open a contact record.

REVISED **Listing Details**: Added ‘Lockbox Number’ and ‘Referring Agent’ fields

REVISED **Contact Record**: Added field for Website

New Subscriber Features:

NEW Definable User Permission Levels: Now you can define the level of your additional users on up to four different levels. Some levels allow users to see and edit all other user's contacts while the most basic level allows them to view only their own.

Note: In order to add a new User, user must first be added as a Contact with at least the following fields filled in: First Name, Last Name, and Email Address

- **Basic user** can <u>only</u> create, view and edit his/her own contacts and calendar entries.

- **Power user** can view all contacts and calendars for all users but can only edit his/her own calendar and contacts

- **Full Access** user can view and edit all contacts and calendar entries for all users.

- **Enhanced users**: Enhanced users have access to their own user administrative section and can add their own photo and signature to the Newsletter, Email Campaigns and Showings emails that are sent to their contacts.

NEW My Settings Section: In the new My Settings section you can edit and modify your contact types, groups, contact status, add custom fields and set default import options. To access this section, click **My Settings** in the **Other** section of the left navigation pane.

1. **My Contacts Preferences:**
    a. Check the Fields to Display (maximum of 5)
    b. Select the order of the fields to be displayed.
    c. Click **Save** button.
2. **Custom Fields:**
    a. To add a new **Custom Field**, select **Click here**.
    b. Type a new name for unique field.
    c. Select sort order from pull down menu.
    d. Click the save icon .
    e. You can edit the **Field Name** or change the sort order by clicking the edit icon or by clicking directly on the field name or sort number.
3. **Contact Options:**
    a. You can **Add** a **Contact Type, Contact Status, or Contact Group** by clicking **Add**.
    b. Type a name in the text box.
    c. Click the save icon.
    d. You can edit any of these by clicking the edit icon or by clicking directly on the name you wish to change.

4. **Importing Options:**
    a. Select the options you want.
    b. Click **Save**.

REVISED **Graphical Experience:** Throughout the program we have made various graphical upgrades to help make MoreSolds easier to use.