Agent Edition

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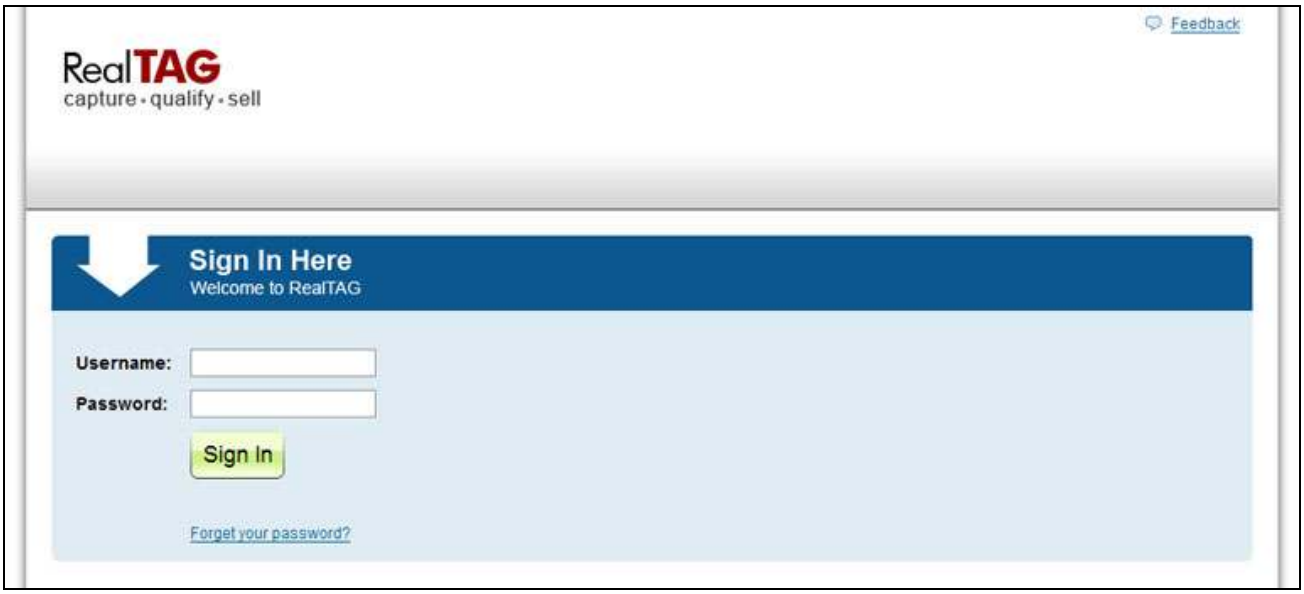
About RealTAG

RealTAG was developed to allow real estate professionals qualify prospects in real time. Based on property information, and covering 93 million households in the United States, RealTAG allows a "behind the scenes" view of a potential customer's financial position based only on their name and address. With RealTAG, you'll know in seconds:

- Are they the homeowner
- What is their propensity to buy
- What is their estimated income
- What is the current value of their home
- Do they have equity
- Are they in foreclosure, or is there a Notice of Default
- What are the neighborhood comparables
- What does their home look like via Satellite photo?

How To Access RealTAG

You can access RealTAG from anywhere you have an internet connection via a safe and secure website. Using your web browser, enter the RealTAG website address: http://www.RealTAG.com



If you have signed in during the last 24 hours, the system will remember you. Otherwise, enter the Username and Password you have been provided, and click the Sign In button.

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How To Retrieve Your Username and Password

When your login fails and you can't remember your username or password, RealTAG will help you retrieve it!

1. On the Log In page, click the "Forget your password?" link.
2. The next screen will ask you to enter your Username, and then click the Next button
3. The next screen will ask you to enter the answer to your Security Question, and then click the Submit button.
4. When you correctly answer the Security Question, your password will be shown to you.
5. Click the Back to Login Screen button to log in.

If you do not remember your Username

1. On the Log In page, click the "Forget your password?" link.
2. On the next screen, click the "I don't know my username" link.
3. Enter your Email address for this Login, and then click the Resend My Login Info button.
4. Click the Back to login screen button.
5. Look in your email Inbox for a message with your Username and Password information.

If you do not remember your Security Question

1. Click the "I don't know my Security Question's Answer" link.
2. Enter your Email address for this Login, and then click the Resend My Login Info button.
3. Click the Back to login screen button

Look in your email Inbox for a message with your Username and Password information

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Logging In For The First Time

When you log in for the first time, you will activate a wizard that guides you through a few easy steps. First you must accept the Usage Agreement. After accepting the Usage Agreement you must select a new username and password. Next, a new browser window will open with the Quick Start guide which will help you through some optional setup options. On the main screen you will be brought to the Prospect History page, (which will be blank because you will not have any prospects entered yet).

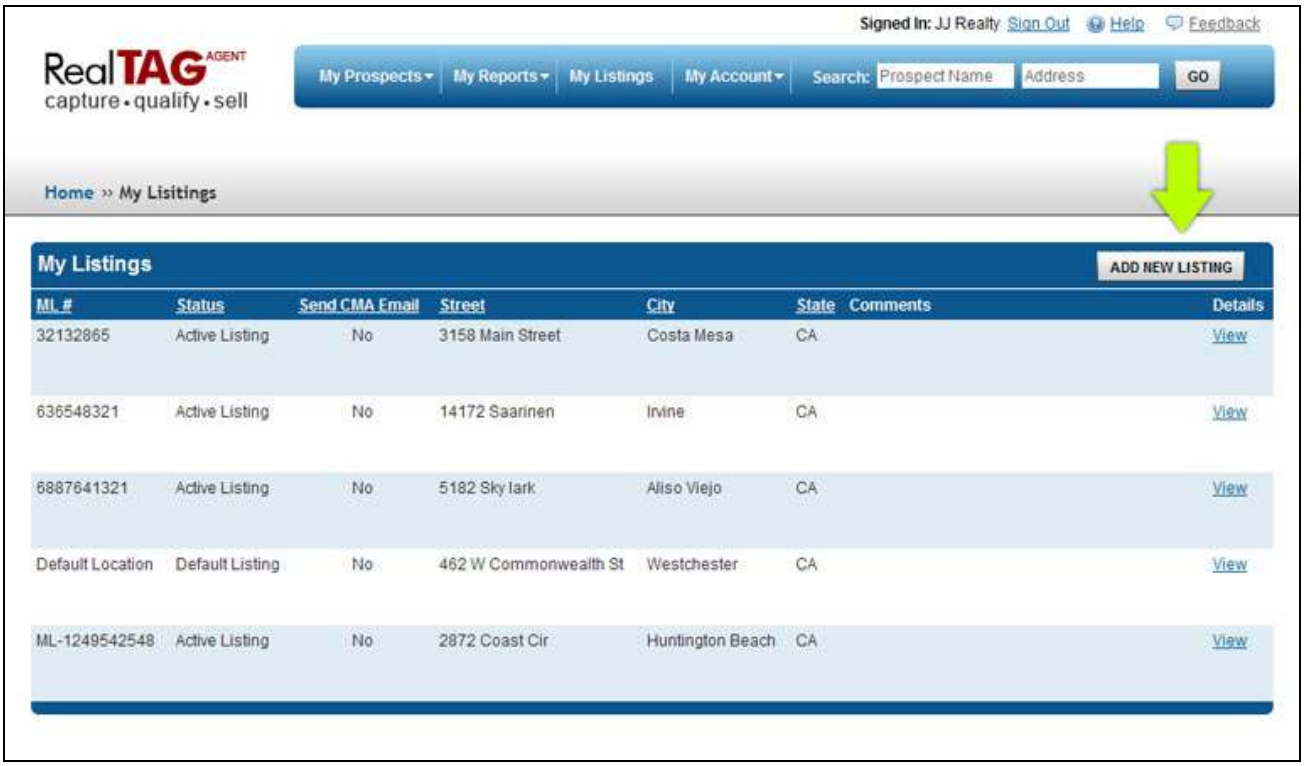
How To Add Listings

RealTAG associates prospects, (potential clients), with the place that you met them. For example:

- If you met Mr. John Smith (a prospect) at an open house that was held at your listing, (the Brown's residence), then RealTAG would list Mr. John Smith as a prospect under the Brown's Residence location.

As part of your initial setup process, RealTAG creates one listing for you, (Default Listing).

Setting up a new listing is easy:



1. From the blue menu bar across the top, click **My Listings.**

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2. Click on the **Add New Listing.**
3. Complete the **New Listing** form. Only the ML#, Property Name and Status are required to create a new listing. You can come back at any time to add or edit listing information.
4. Select **Yes or No**, if you want a CMA, (Competitive Market Analysis) email to be sent to a prospect after they are entered into the system. (Note: You must enter the consumer's email address in order to use this feature of RealTAG).
5. The rest of the fields are optional, however the all of the property details entered will be used to create a CMA email sent to your prospect.
6. Click on **SAVE NEW LISTING.**

All listings are displayed until the status is changed to closed, (i.e. expired or sold). Closed listings can be retrieved from the reports section.

Please remember, entering a listing into RealTAG is entirely optional. A consumer would only see the listing information that you input if you have both enabled the "Send CMA Email" option, and gotten the prospect's email address, (for delivery).

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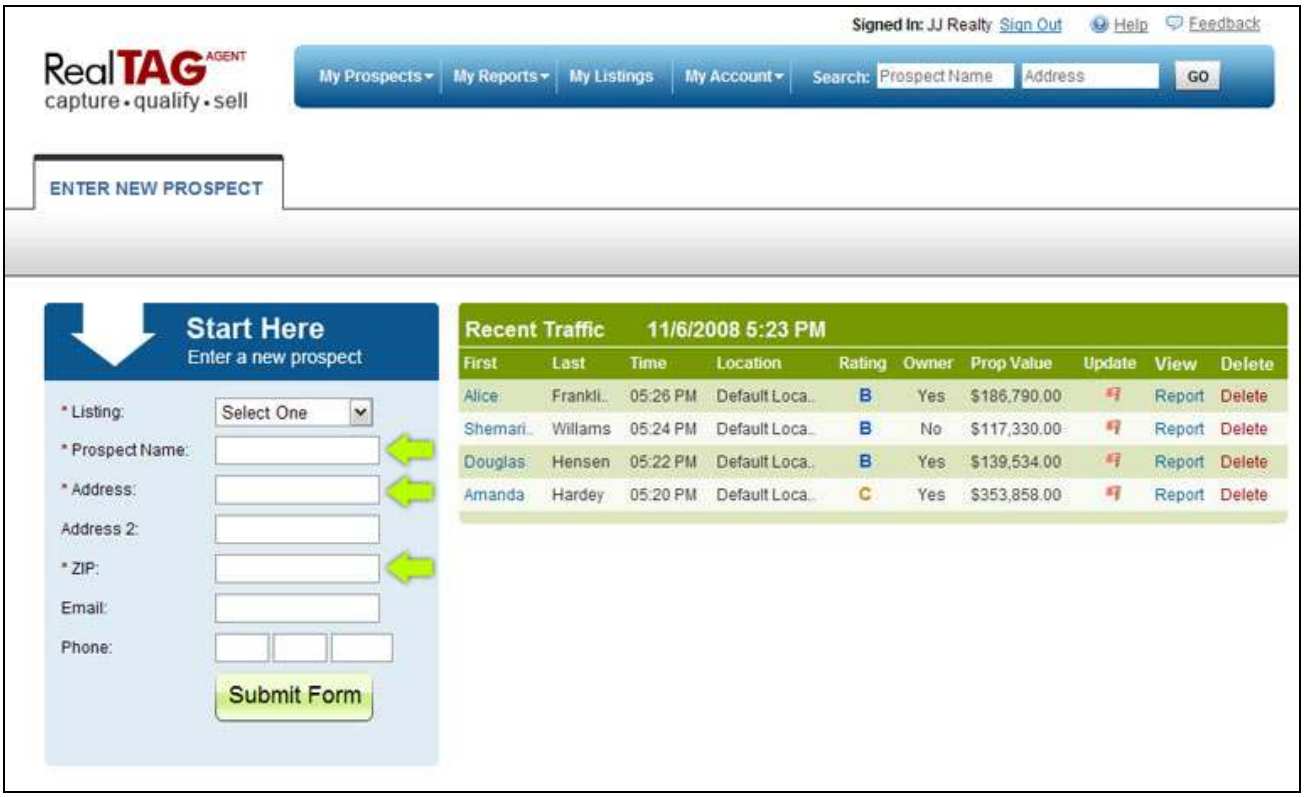
Entering New Prospects into RealTAG

Understanding who you are working with, (their assets and potential liabilities) is the key to successful sales situation. Start with RealTAG by entering your first prospect into the system.



1. Enter the Prospects First and Last name, Address, and Zip Code. We automatically lookup city for you.
2. Although, Email and Phone are not required, this information is helpful for contacting the prospect at a later time. Additionally, **prospects with email addresses can be sent the follow-up CMA email with listing information and your contact information.**
3. Click the Submit Form button.

Made An Error? Deleting Prospects

If you have made a typo in the address or name of the prospect, simply re-run the prospects' RealTAG report. You can delete the outdated prospect by clicking on the red "Delete" link to the right of each RealTAG record.

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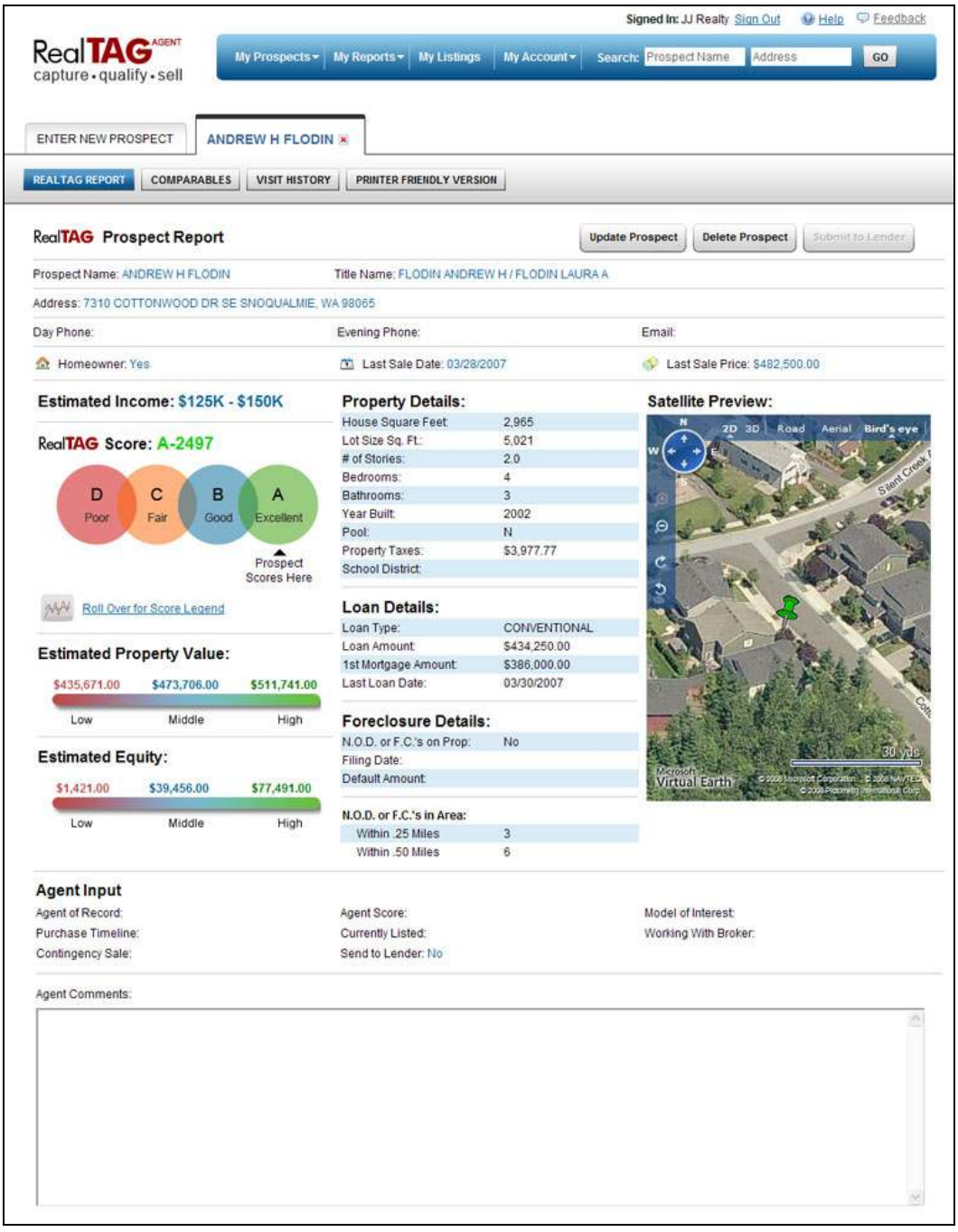
Understanding the RealTAG Report

The RealTAG prospect report is the heart of our system. Each RealTAG report that you run will give you valuable insight into the purchasing capabilities of the person that you are working with.



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RealTAG allows a “behind the scenes” view of a potential customer’s financial position based only on their name and address. Questions that you are able to answer instantly with RealTAG include:

- Is the prospect a homeowner at the address given?
- What is their likelihood to buy, & ability to sell their current house within a short time?
- What is their estimated income range?
- What is the current value of their home?
- Do they have equity, and if they do, how much do they have?
- Are they in foreclosure, or is there a Notice of Default on their current property?
- What are the neighborhood comparables?
- What does their home look like via Satellite photo?

RealTAG is designed to ***supplement*** and enhance your own sales instincts about the prospect standing in front of you. All of the information that we present is from public record data, and therefore there is no concern from a consumer privacy standpoint.

RealTAG reports give you a sneak peek into the background of the prospect, but as with any sales situation, the final authority on your prospect is you. No matter what the RealTAG report comes back with regarding your prospect, make sure that you ask questions! RealTAG can only report back information that is listed in public record databases about your prospect.

For example, if your prospect just won the lottery, RealTAG would not necessarily report the increase in income that the prospect just came into. You asking the RIGHT questions would!

RealTAG works on nearly 94 million households across the county.

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How to read the RealTAG Report

RealTAG reports are designed to be read quickly to help you make rapid decisions about your prospects. The RealTAG report is split into a number of sections:

- **Owner Information Section**
  - Who is on title?
  - Does the address exist?
  - Is there a match between the person that you entered, vs. who is on title?
  - What was the last sale date?
  - What was the last sale amount?

- **Income / Equity Section**
  - What is the prospect's estimated Income?
  - What is the prospect's likelihood to purchase AND sell their current home in the next 90 to 180 days?
  - What is the prospect's estimated property valuation range?
  - What is the estimated equity that the prospect has?

- **Property Details Section**
  - What is the square footage of the house
  - What is the number of stories?
  - How many bedrooms and bathrooms are there?
  - What year was the home built?
  - Is there a pool?
  - What are the annual property taxes?
  - What school district is the property in?

- **Loan Details Section**
  - What type of loan does the homeowner have?
  - What was the original loan amount on the home?
  - What is the 1st mortgage loan amount?

- **Foreclosure / Notice of Default Section**
  - Is there a foreclosure / notice of default on the property?
  - If there is, what was the filing date?
  - If there is, what is the default amount?
  - How many foreclosures / N.O.D's are within .25 and .50 a mile?

- **Property / Neighborhood Satellite Preview**
  - What does the property / neighborhood look like?

RealTAG was designed to give the agent an inside look at the "potential" of any given prospect. However, while a RealTAG report delivers a very large amount of information to your desktop regarding your prospect quickly, the ultimate authority in the sales situation is you!

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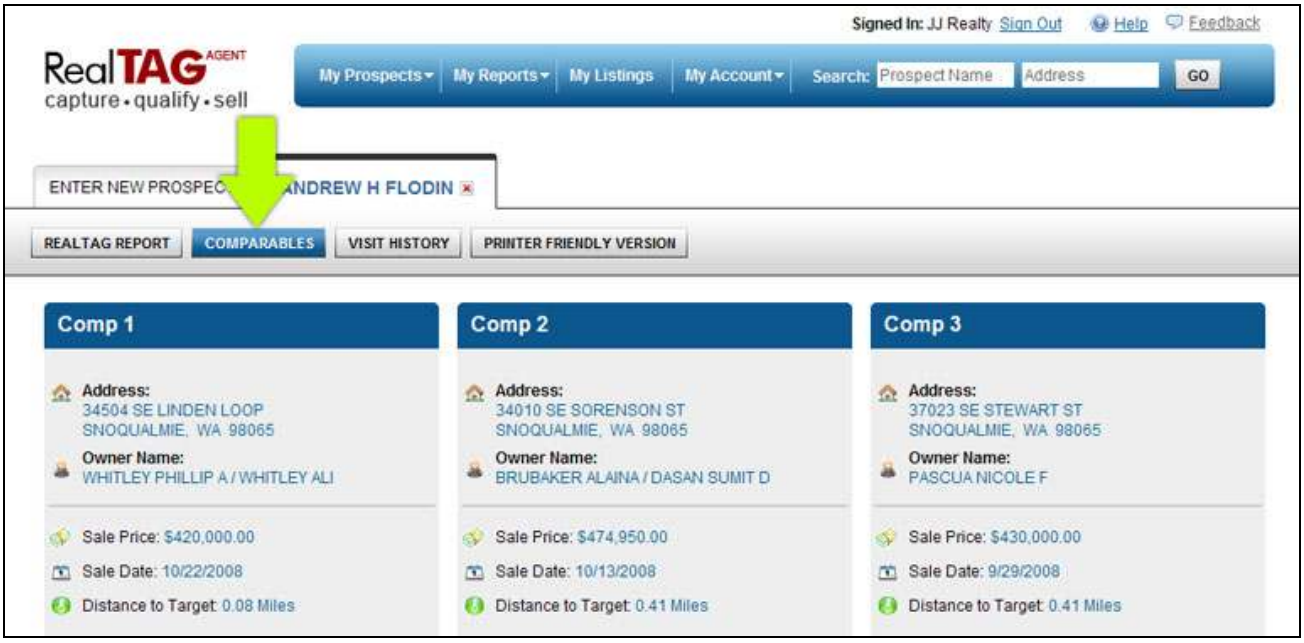
Recent Comparable Sales

RealTAG automatically pulls three recent sales to give you an idea of activity within the prospect's neighborhood. RealTAG pull recent sales by both time AND distance, thereby giving you the most up to date, accurate information available.

The comparables menu can be reached from the RealTAG report page:



Additional comparable details

RealTAG also pulls financial information about the comp's to give you an "apples to apples" comparison of the target property. In addition to sales by time and distance from the target, RealTAG comps include:

- Sale amount
- Estimated equity at the close
- 1st mortgage amount
- Property tax information.

Tracking a Prospects Visit History

If a potential prospect comes to one of your listings multiple times, RealTAG will capture that information automatically each time that you run a RealTAG report. To view any prospects visit history, simply run a RealTAG report on the prospect, and then click on the "Visit History" button.

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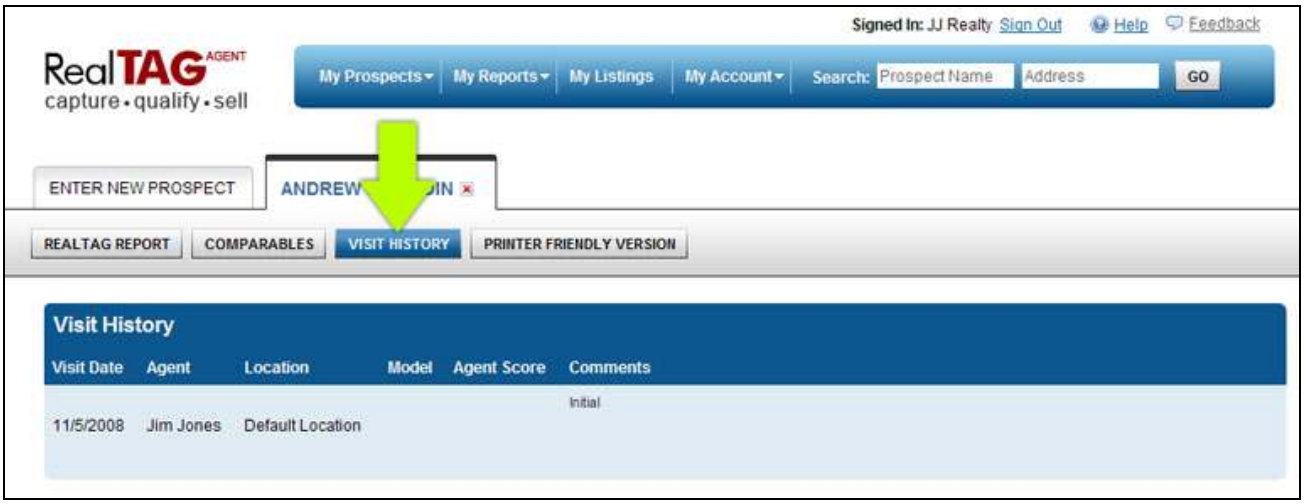

Once you are on the “Visit History” page, you are able to view all of the visits that the prospect made (provided that a RealTAG report was generated), along with the time and date stamp of the visit.

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Setting up the Lender Referral System

You can have RealTAG automatically email a file with the prospect contact information to the lender of your choice.

1. On the Menu Bar, select the My Account - > Change Profile Info.
2. Click on the EDIT INFORMATION Button.
3. Go to: Send Prospect Information To Lender by Default
4. Click the “Yes” radio button
5. Input or update the lender information and click the Update Information button.

With the Lender Referral system activated, any RealTAG report that you generate will be automatically converted to CSV (Comma Separated Value), and emailed to the lender email that you specified automatically.

Lender referrals are sent once per day.

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The Menu Bar

- **My Prospects**
  - Enter a New Prospect
  - View All Prospects
- **My Reports**
  - Traffic Report
  - Prospect Multi-Visit Report
- **My Listings**
- **My Account**
  - Change Login Info
  - Change Profile Info
  - Account Info
  - Customer Emails
- **Searching for Prospects**

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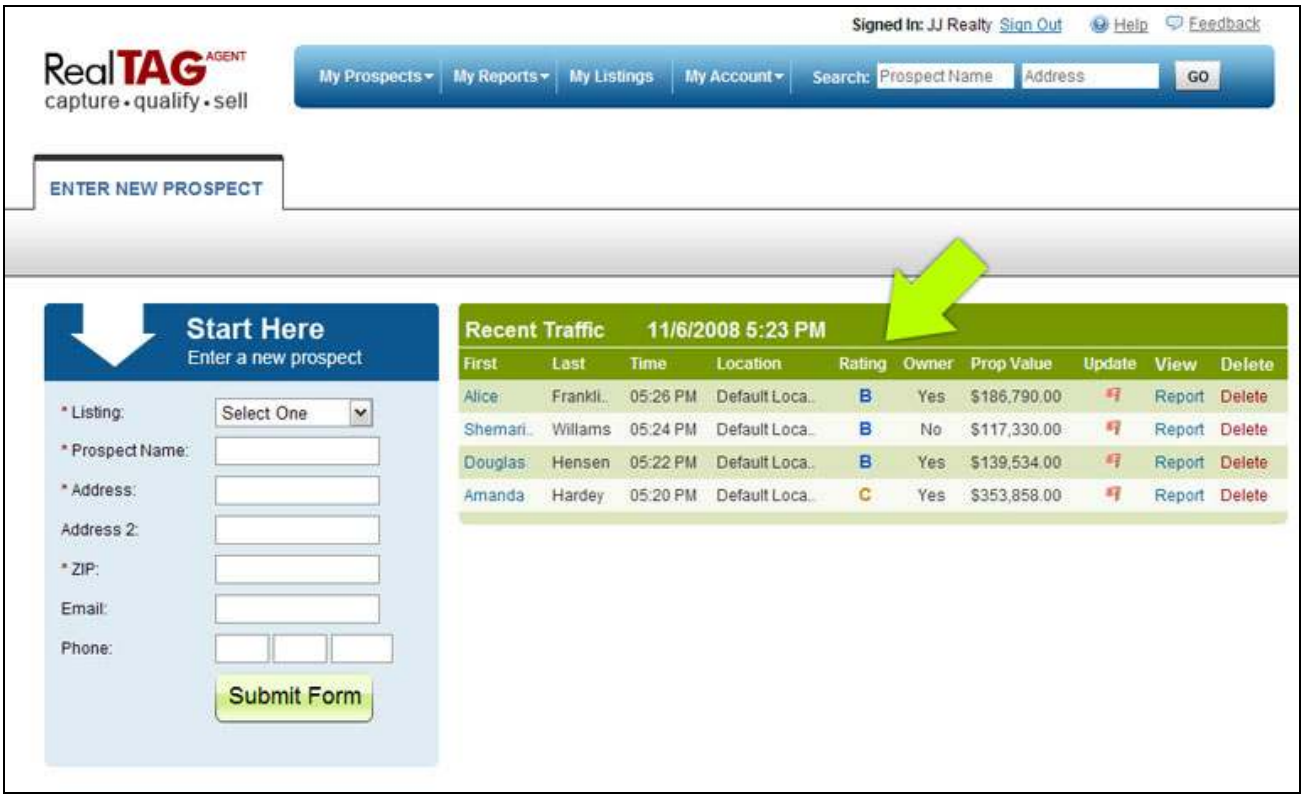
Working With Prospects

Finding Specific Prospects

There are three methods you can use to find a specific prospect:

Method #1

If you know the prospect has been entered in the last 24 hours, they will be listed on the Recent Traffic section of the Enter New Prospect page.



1. Click the Enter New Prospect tab.
2. You may sort the prospects by clicking on a heading at the top of the list. For example, to sort by Last Name, click the Last Name heading.
3. Find the prospect on the list.
4. Click the Report link under the View heading to see the report for the prospect.

Method #2

If you don't know when the prospect visited and you know their name or address, you can use the Search fields at the top right of the screen.

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1. Enter the Name and/or Address of the prospect.
2. Click the Search button.
3. A list will display with the prospects that are found. Prospects that are found will depend on spelling, but not letter case.
4. Click the View link to see the report for the prospect

Method #3

If you still cannot find your prospect, use the advanced search on the My Prospect page.

1. From the menu bar at the top, select the My Prospects List.
2. Next to Quick Search, click the Advanced Search link.
3. Once on the Advanced Search page, you may search by multiple selections.

Deleting a prospect

1. Find the Prospect using one of the search methods from above.
2. Open the Report for the Prospect.
3. Click the Delete button in the right hand corner of the RealTAG report.
4. Confirm that you want to delete the prospect

How to find groups of prospects

You may want to find a group of prospects that all meet a certain criteria. For example: prospects with a certain RealTAG Score, etc. The advanced search is a great tool for finding groups of prospects. Additionally, after you find your list of prospects, you may export the list to CSV for another use, (mailing list / import to contact manager).

This is how to use the advanced search.

1. From the menu bar at the top, select the My Prospects List.
2. Next to Quick Search, click the Advanced Search Link.
3. Enter the combination of criteria that you are looking for.
4. Click the Go button.

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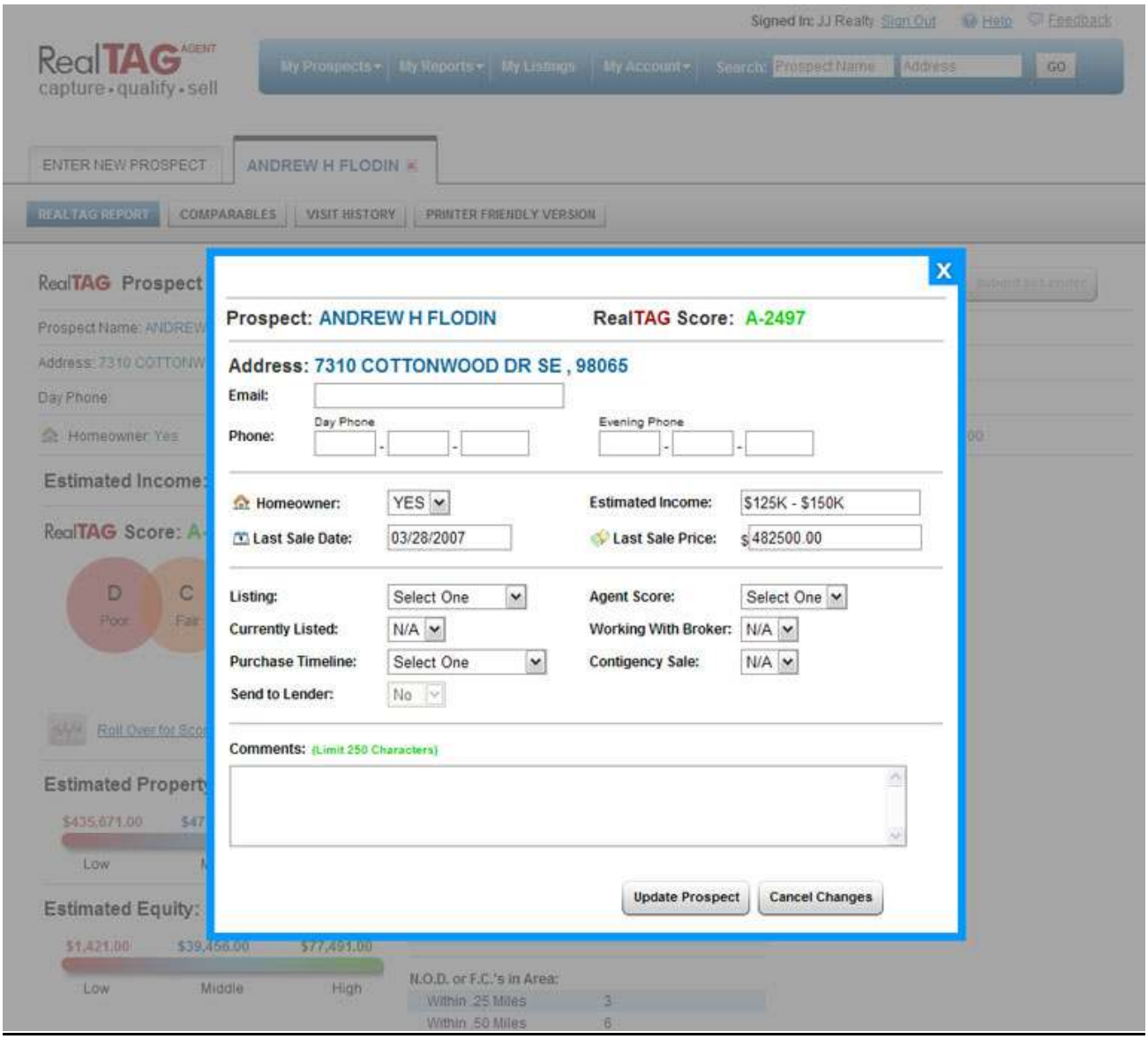
Modifying a Prospects RealTAG Report

RealTAG was designed to give you a large amount of background information regarding your prospect quickly. Additionally, RealTAG allows you to quickly and easily modify the RealTAG record of each of your prospects.



Within the Modify Prospects page, you can change:

- Phone and email entry
- Overriding our Income or RealTAG scores
- Purchase time table
- Contingency sale information

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- If the prospect is currently working with an agent
- Your perception of the prospect

Quickly identifying prospects that have not been updated

You can quickly identify prospects in the Recent Traffic List or the Prospects List who need to be updated. These prospects will have a red flag icon in the update column.

Click on the red flag icon to be directed to the update screen.

Updating prospects in RealTAG

Click in any of the modifiable fields, and change the value. When you are done, click on the “Update Prospect” button. To abandon any changes made, simply click on the “Cancel Changes” button.

Exporting your prospects

Why would you want to export your prospects to CSV? CSV is a Comma Separated list of data that is easily imported by many other systems and commonly viewed using Microsoft Excel. You can use a CSV file to load prospects into your CRM or Lead Management software. You can use the file to populate address labels to send follow up direct mail.

Here is how to export your Prospects to a CSV file:

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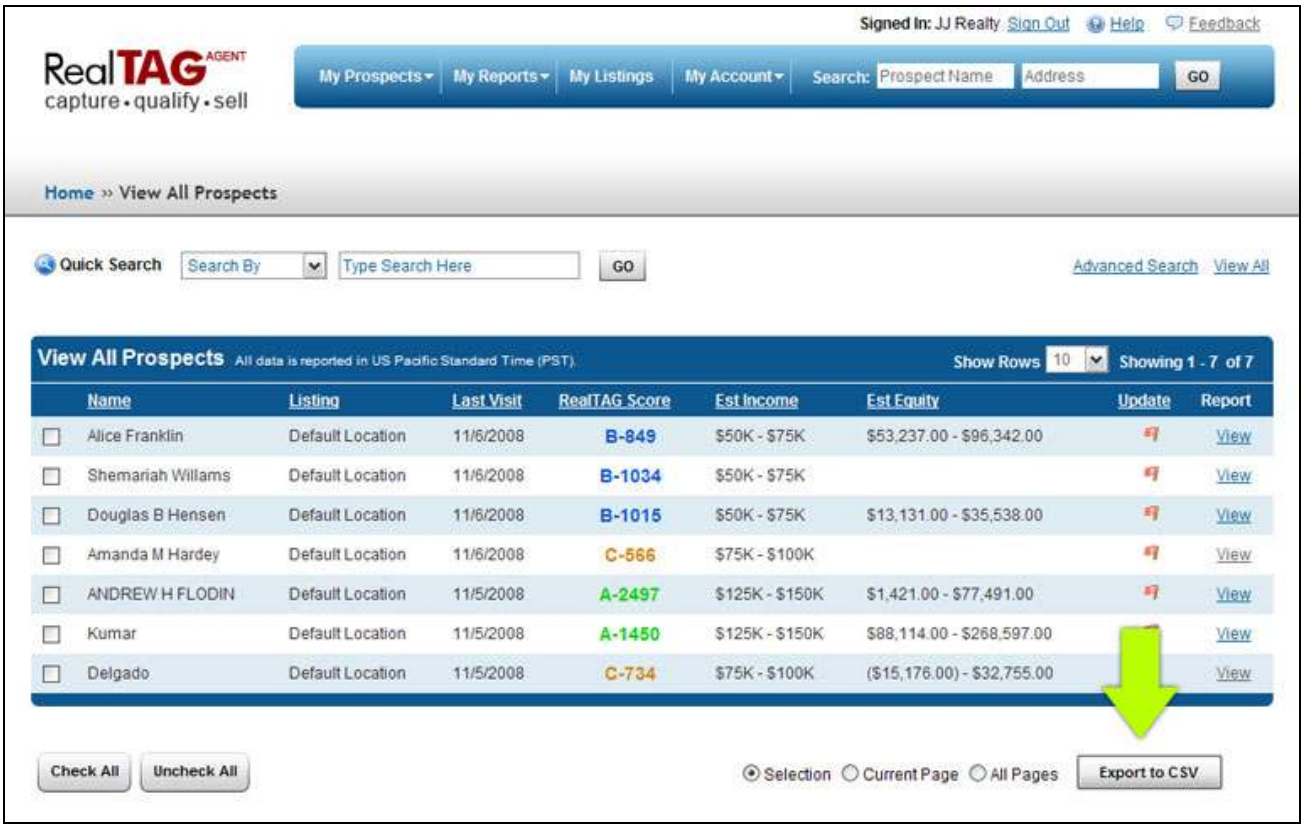

1. On the Menu Bar, select the My Prospects > View All Prospects.
2. Select the Prospects you want to export. You can click the “Check All” button, or individually select Prospects. You can also export the current page of prospects or all pages of prospects in the system by selecting the correct option at the bottom of the screen.
3. Click the **Export to CSV** button.
4. A File Download box will ask you if you want to open or save the file. Click the SAVE button.
5. Browse to the location on your computer where you would like to save the file.
6. Click the Save button.
7. When the Download Complete box pops up, click the close button.

The My Reports menu

RealTAG has built in reports available for your use. To access the reports, simply click on the My Reports in the main menu bar. You will find two built in reports:

- Traffic Report
- Multi Visit report

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To access any of the reports, simply click on the name of the report. Once you have accessed the report writer, you may use any of the custom variables to create a custom report. On the following screen, you will be able to set up your own queries to customize the report output.

The My Listings Menu

RealTAG associates prospects, (potential clients), with the place that you met them. For example:

- If you met Mr. John Smith (a prospect) at an open house that was held at your listing, (the Brown's residence), then RealTAG would list Mr. John Smith as a prospect under the Brown's Residence location.

As part of your initial setup process, RealTAG creates one listing for you, (Default Listing).

Setting up a new listing is easy:

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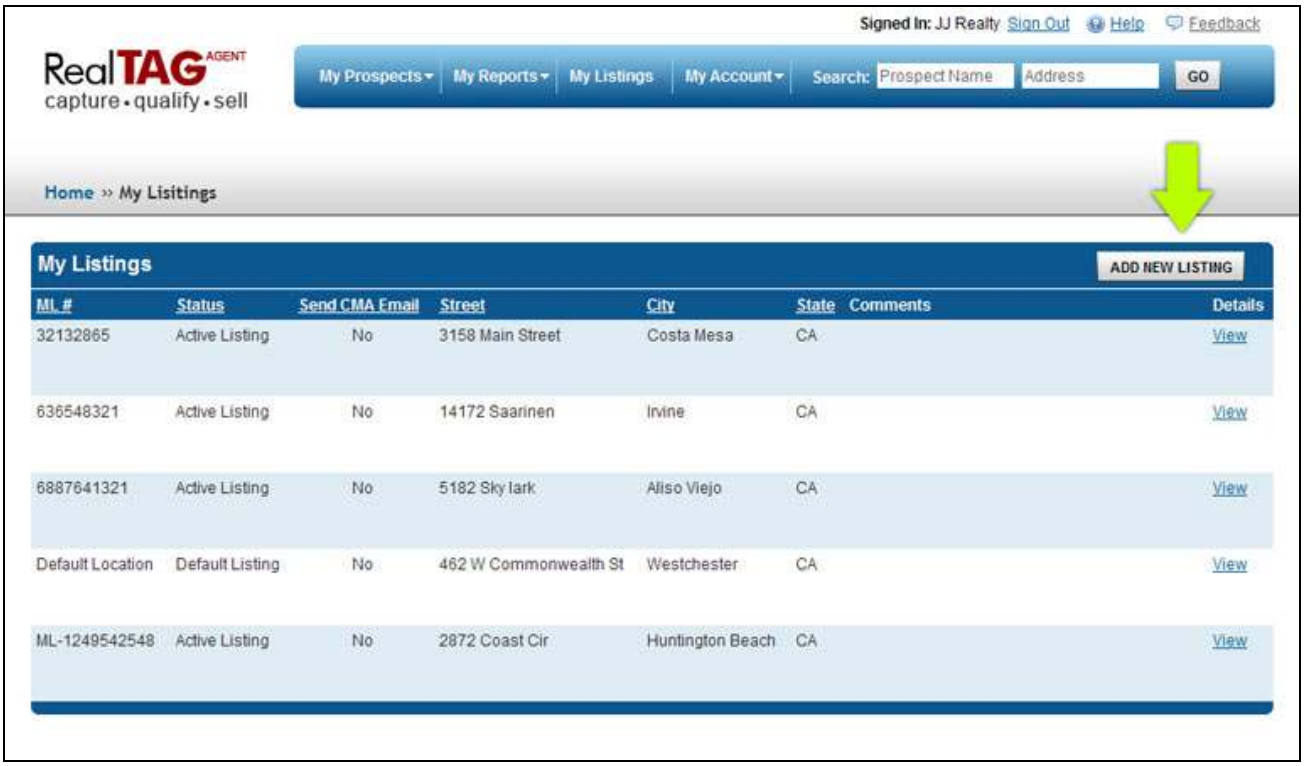

7. From the blue menu bar across the top, click **My Listings.**
8. Click on the **Add New Listing.**
9. Complete the **New Listing** form. Only the ML#, Property Name and Status are required to create a new listing. You can come back at any time to add or edit listing information.
10. Select **Yes or No**, if you want a CMA, (Competitive Market Analysis) email to be sent to a prospect after they are entered into the system. (Note: You must enter the consumer's email address in order to use this feature of RealTAG).
11. The rest of the fields are optional, however the all of the property details entered will be used to create a CMA email sent to your prospect.
12. Click on **SAVE NEW LISTING.**

All listings are displayed until the status is changed to closed, (i.e. expired or sold). Closed listings can be retrieved from the reports section.

The My Account Menu

The My Account menu allows you to perform changes and updates to your account.

My login info
On the My Login Info page, you will find the current user name, password, etc. for your account. If you would like to change any of the user options, simply click on the "Edit My Account" button at the bottom left corner of the page.

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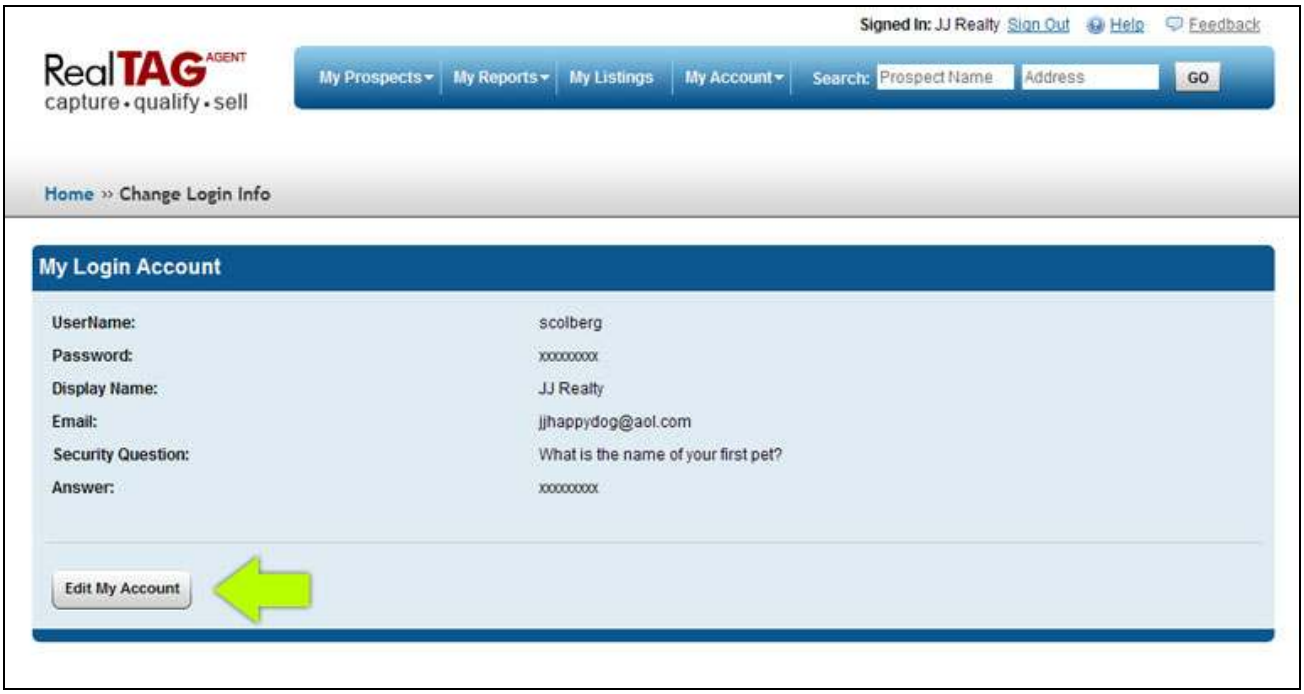

Once you have changed the options on the Edit My Account page, ensure that you click on the “Update Account Info” button to save your changes.

Change profile info
The My Profile page is an important page within RealTAG. The My Profile is split into three sections:

- Your profile information (displayed to prospects)
- CMA / Lender Account settings
- Lender Referral Info

Your Profile Section

By clicking on the Edit Information button, you can add or update your profile by typing in the text boxes on the page. Some of your profile information was populated using information that you supplied during the account set-up.

You should review your profile before using RealTAG to send CMA emails to prospects.

Uploading Your Picture and Logo for use in the CMA Email

Upload Agent Picture - Click on the Upload Agent Picture button. A Windows file upload box will appear on the screen. Navigate to the picture and click upload. The agent picture should be 100 by 100 pixels or smaller. Use any of the following file formats: .jpg, .png, or .gif. File size should be smaller than 20K.

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Upload Logo - Click on the Upload Logo button. A Windows file upload box will appear on the screen. Navigate to the picture and click on upload. The agent picture should be 150 by 100 pixels or smaller. Use any of the following file formats: .jpg, .png, or .gif. File size should be smaller than 20K.

CMA / Lender Account Settings Section

Send CMA Email By Default

Select **Yes** when you are ready to have RealTAG send the Prospect a CMA (Competitive Market Analysis) email by default. **You can preview the email by choosing Preview Email from the My Reports tab on the blue menu bar.**

Send Prospect Information to Lender By Default

Select "**Yes**" if you would like to have RealTAG forward prospect reports to your lending partner automatically. You must complete the information in the Lender Referral Info section of this page.

Lender referral Info

If you have a lender that you work with, and would like to automatically receive all of your RealTAG reports, (as leads), fill in all of their contact information.

When you are done, click on the "Save New User" button at the bottom of the window.

To abandon any changes made, click on the "Cancel Changes" button.

Account Info

On the Account Info page you are able to view:

- Your current RealTAG package
- Your current account status (number of RealTAG reports run, etc).
- Your transaction history

You can also update your billing (credit card) information or cancel the RealTAG service.

Change Billing Info

If you need to review, or change your billing information, click on the "Change Billing Info" button in the upper right hand corner of your screen.

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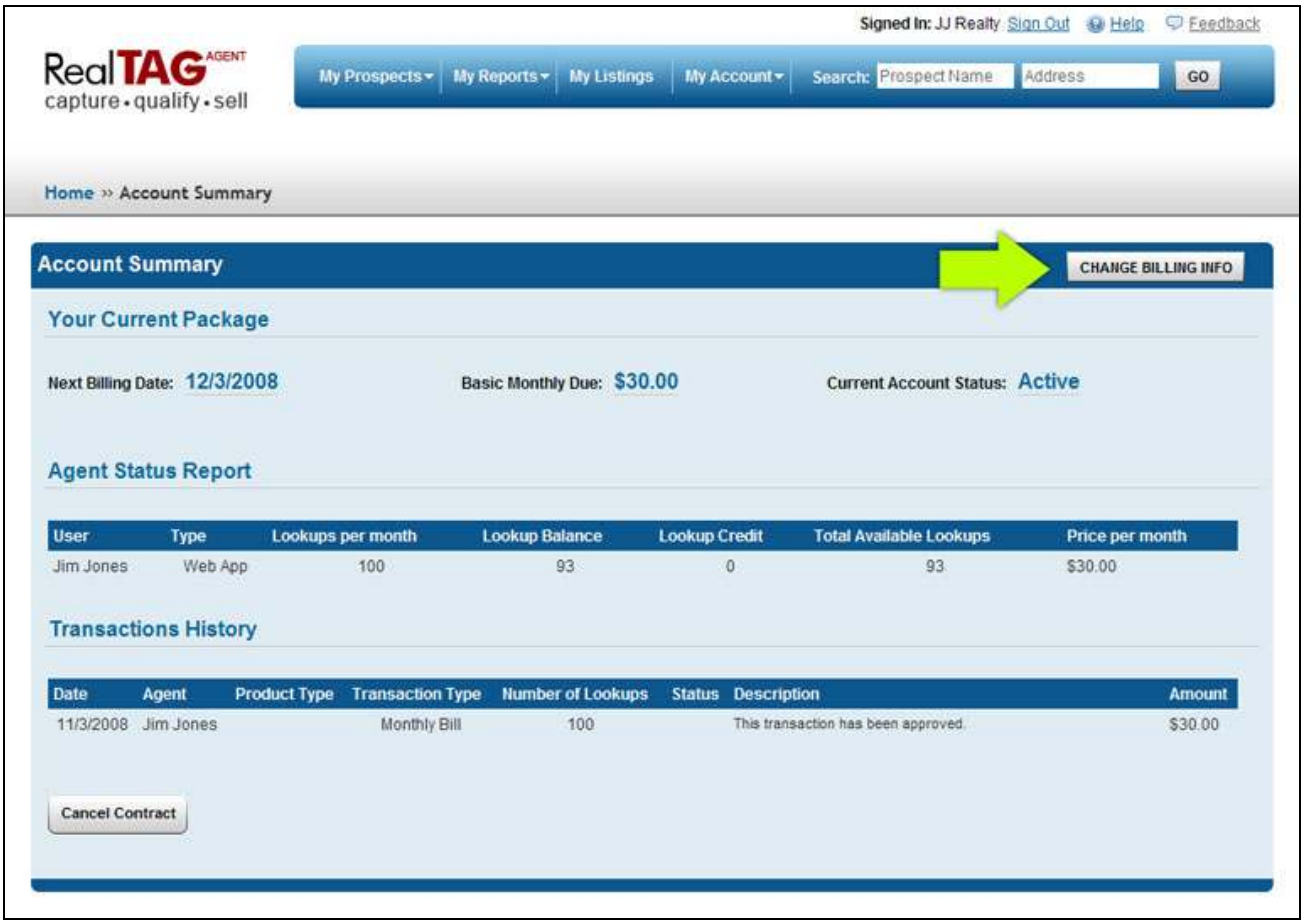

To update any information, click on the “Edit My Billing Info” button. Make the necessary changes and Click on the “Update Billing Info” button.

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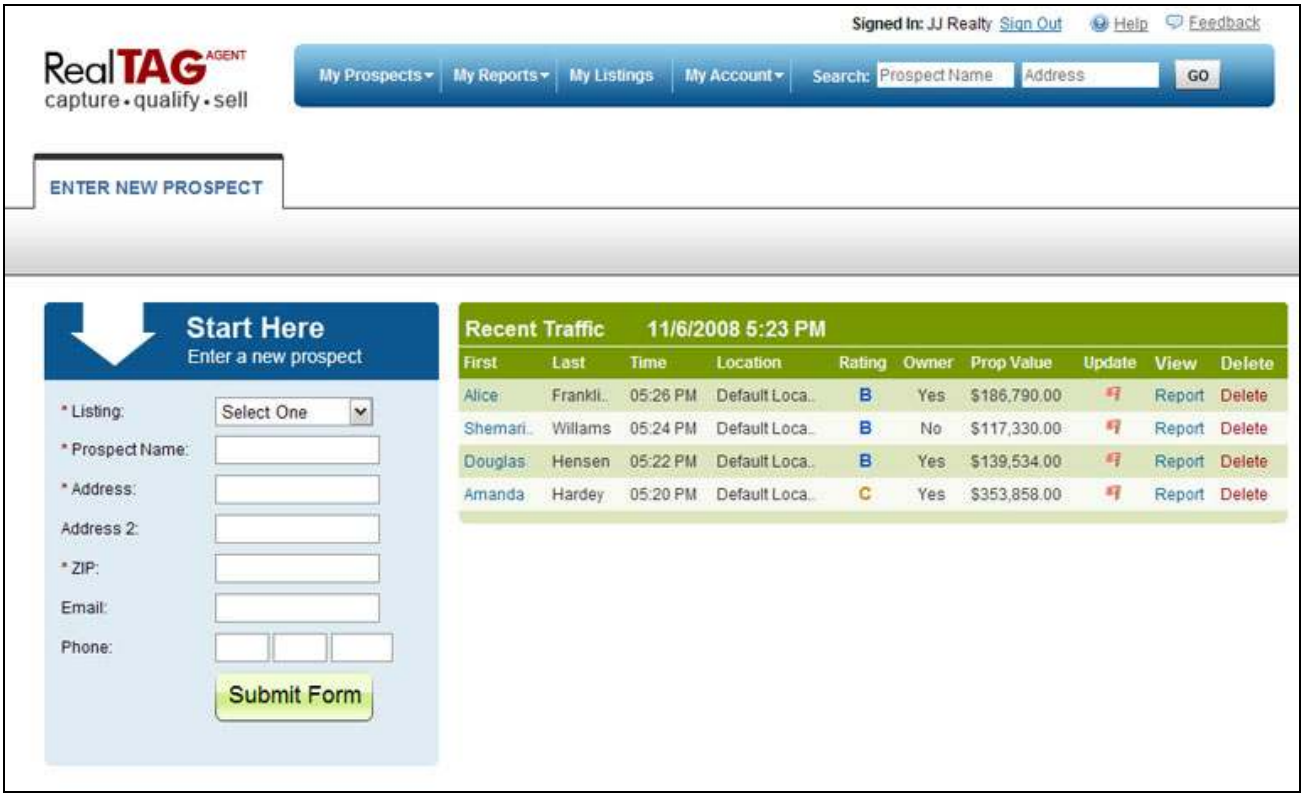
Appendix

RealTAG Screen by Screen

Enter New Prospect screen

The Enter New Prospect screen is the heart of the “Front Office” of the RealTAG system. Here you are able to run RealTAG reports on your traffic, as well as quickly access recent traffic.



Field Definitions:

Listing: This is a required field. This drop down list contains all the active listings. When you select a listing for the first time after signing in, the system will remember the listing you selected. The location named Default Location has no listing associated with it and allows you to lookup up prospects without associating them with a specific property. If you have enabled emailing prospects from RealTAG, selecting the default location will cause the system to send a generic CMA email to the prospect.

Prospect Name: This is a required field. Enter the first and last name of the prospect.

Address: This is a required field. Enter the street number and name part of the address for this prospect.

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Address 2: This field is not required. Enter any more specific information for the address, for example, the apartment number. This is valuable information if you are going to market using direct mail.

Zip: This is a required field. Enter the zip code of the prospect's address.

Email: This field is not required. When possible, enter the email address for the prospect. If an email address is entered, the system can automatically send the prospect a property report as a marketing tool.

Phone: This field is not required. When possible, enter the primary phone number for the prospect. This information can be used to follow up with the prospect. If you have more than one phone number, the second phone number can be entered on the Update Prospect screen.

Submit Form button: Click this button to enter the prospect information into the system and view the report.

Recent Traffic List
Click on any list heading to sort by that heading. Recent Traffic is listed for the last 24 hours.

Update: If the Update column shows a red flag, this indicates that the prospect has not been updated at all. If the column shows an Update link, the prospect has been updated at some time. Click on the red flag or Update link to go to the Update page and enter more information about the prospect.

View: The View column shows a Report link. Click on this link to view the Prospect Report for this prospect.

Delete: The Delete column shows a Delete link. Click on Delete to remove the prospect from the system. You will be given a warning before the prospect is deleted.

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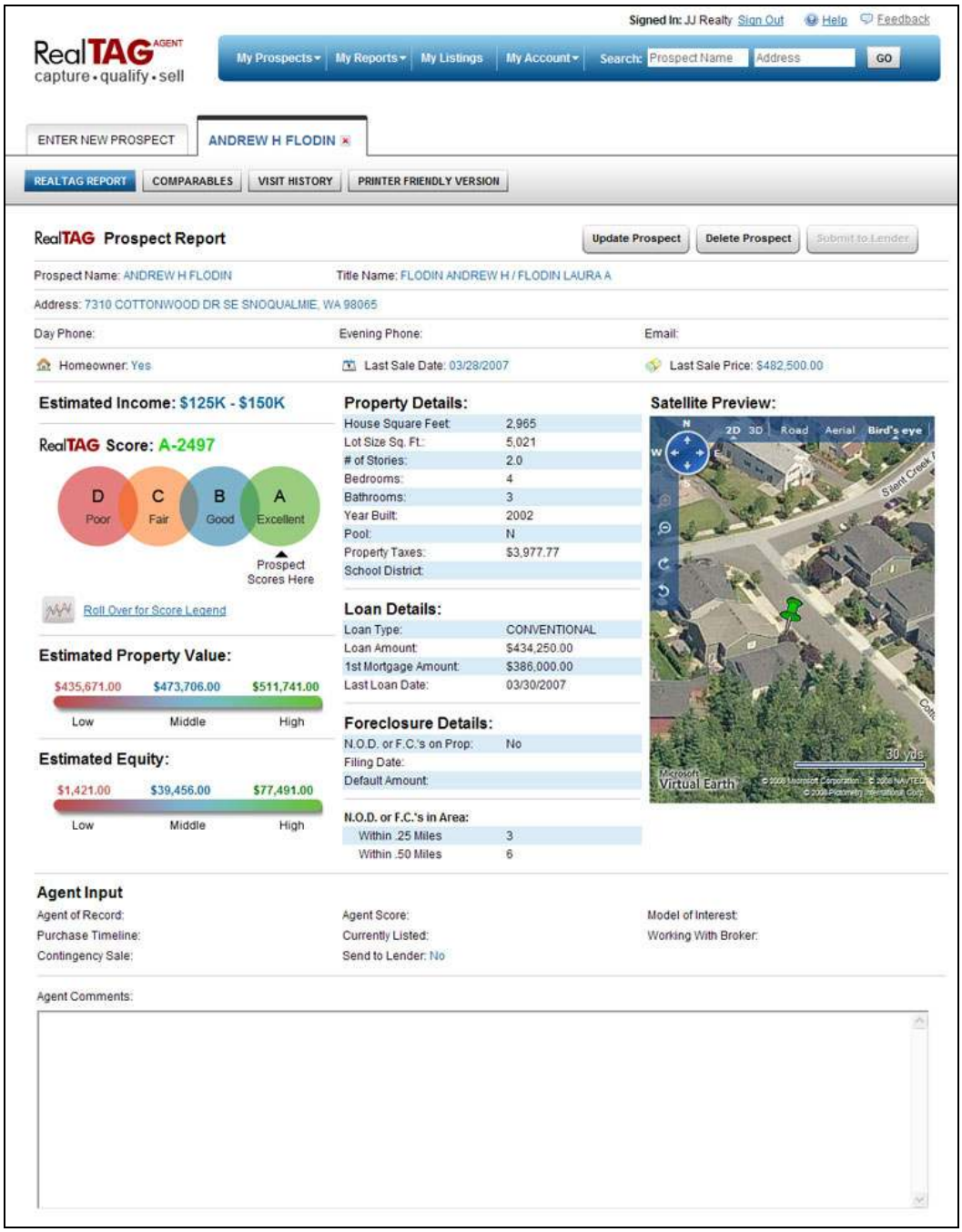
The RealTAG Report Screen

The RealTAG report screen is the central report within the system. The RealTAG report is designed to give you a quick understanding of the abilities (and liabilities) that a potential prospect may have.



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Field Definitions:

Prospect Name: Displays the prospect's name as entered by the agent.

Title Name: Displays the owner of the property according to title records.

Address: Displays the full address found as a result of the system lookup.

Day Phone: Displays the phone number as entered on the Update screen.

Evening Phone: Displays the phone number entered from the Enter New Prospect screen and/or from the Update screen.

Homeowner: Indicates if the property is owner occupied as reported from the system lookup.

Last Sale Date: Displays the date the property was last purchased according to the system lookup.

Last Sale Price: Displays the amount the property sold for on the Last Sale Date according to the system lookup.

Estimated Income: The estimated income is a proprietary statistical model that generates a probable income range for the individual at the address listed. The Income score does not use any credit data, nor input from the consumer to generate its income range estimate. Additionally, all data that is used to create the score is public, and therefore there are no consumer privacy concerns.

As with all of our calculations and scores, our estimated income calculations **should be used as a guide, within the sales process**, with the final judgment as to its accuracy being you. Please confirm all information presented within a RealTAG report with the prospect.

RealTAG Score: The RealTAG score is a proprietary statistical model that generates a letter grade to represent a prospect's likelihood to purchase as well as be able to sell their existing property within a 90 to 180 day window.

Something to think about: Like a FICO© score generates a score that grades the likelihood of an individual to pay back a debt, our RealTAG model uses many factors to determine the likelihood that an individual will purchase within a short amount of time. Just like a FICO© score, our RealTAG cannot predict outlying events, (lottery winners, inheritance, etc.), however if you use the score as a guide and addition to your own sales instinct, you do have an advantage.

One of the most commonly asked questions that we receive on the RealTAG score is to do with the prospect's financial situation. Simply put, cash on hand does not equal a higher

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likelihood of a person to purchase a new home in the next 90 to 180 days. In fact you can argue that in a tough market, someone that has a large amount of equity or cash on hand is less likely to move in the short run due to potential hit that they would take on their current home.

As with all of our calculations and scores, our RealTAG score **should be used as a guide, within the sales process**, with the final judgment as to its accuracy being you. Please confirm all information presented within a RealTAG report with the prospect.

Estimated Property Value: The estimated property value range of the subject property on the day that the RealTAG report was run. Our estimated property value range is calculated using First American CoreLogic's best in class AVM's (Automated Valuation Models).

As with all of our calculations and scores, our estimated property value calculations **should be used as a guide, within the sales process**, with the final judgment as to its accuracy being you. Please confirm all information presented within a RealTAG report with the prospect.

Estimated Equity: Our estimated equity range is calculated based on existing loan information, as well as current estimated property value. As with all of our calculations and scores, our estimated equity calculations **should be used as a guide, within the sales process**, with the final judgment as to its accuracy being you. Please confirm all information presented within a RealTAG report with the prospect.

House Square Feet: Displays the square feet of the house according to public record as the result of a system lookup.

Lot Size Sq. Ft.: Displays the square feet of the lot according to public record as the result of a system lookup.

# of Stories: Displays the number of levels of the house according to public record as the result of a system lookup.

Bedrooms: Displays the number of bedrooms of the property according to public record as the result of a system lookup.

Bathrooms: Displays the number of bathrooms of the property according to public record as the result of a system lookup.

Year Built: Displays the year the house was built according to public record as the result of a system lookup.

Pool: Displays information if the property has a pool according to public record as the result of a system lookup.

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Property Taxes: Displays the annual property tax amount on the property according to public record as the result of a system lookup.

School District: Displays the school district the property is located in according to public record as the result of a system lookup.

Loan Type: Displays the type of loan for the first mortgage on the property according to public record as the result of a system lookup. Values will be Conventional (CNV), Private Party (PP), FHA, or VA.

Loan Amount: Displays the total loan amount across all liens. When this amount is higher than the 1st Mortgage Amount, it indicates there is secondary financing on the property.

1st Mortgage Amount: Displays the amount of the first mortgage lien on the property.

N.O.D. or F.C.'s on Prop: Displays Yes or No, indicating if there are any Notice of Default or Foreclosure liens on the property.

Filing Date: Displays the date of the filing of the Notice of Default or Foreclosure on the property, if there is one.

Default Amount: Displays the amount of the default as filed.

N.O.D. or F.C.'s within .25 Miles: Displays the number of Notice of Default and Foreclosures within .25 miles of the property.

N.O.D. or F.C.'s within .50 Miles: Displays the number of Notice of Default and Foreclosures within .50 miles of the property.

Satellite Preview: A map of the property is displayed. You can zoom in and out and switch the view between Aerial, Bird's Eye, and Road.

Agent Input:
Agent Input is entered on the Update screen. Each time a prospect visits, a new Update record can be entered to indicate multiple visits to a property and the comments associated with the visit. Please see information on the Update screen for field definitions.

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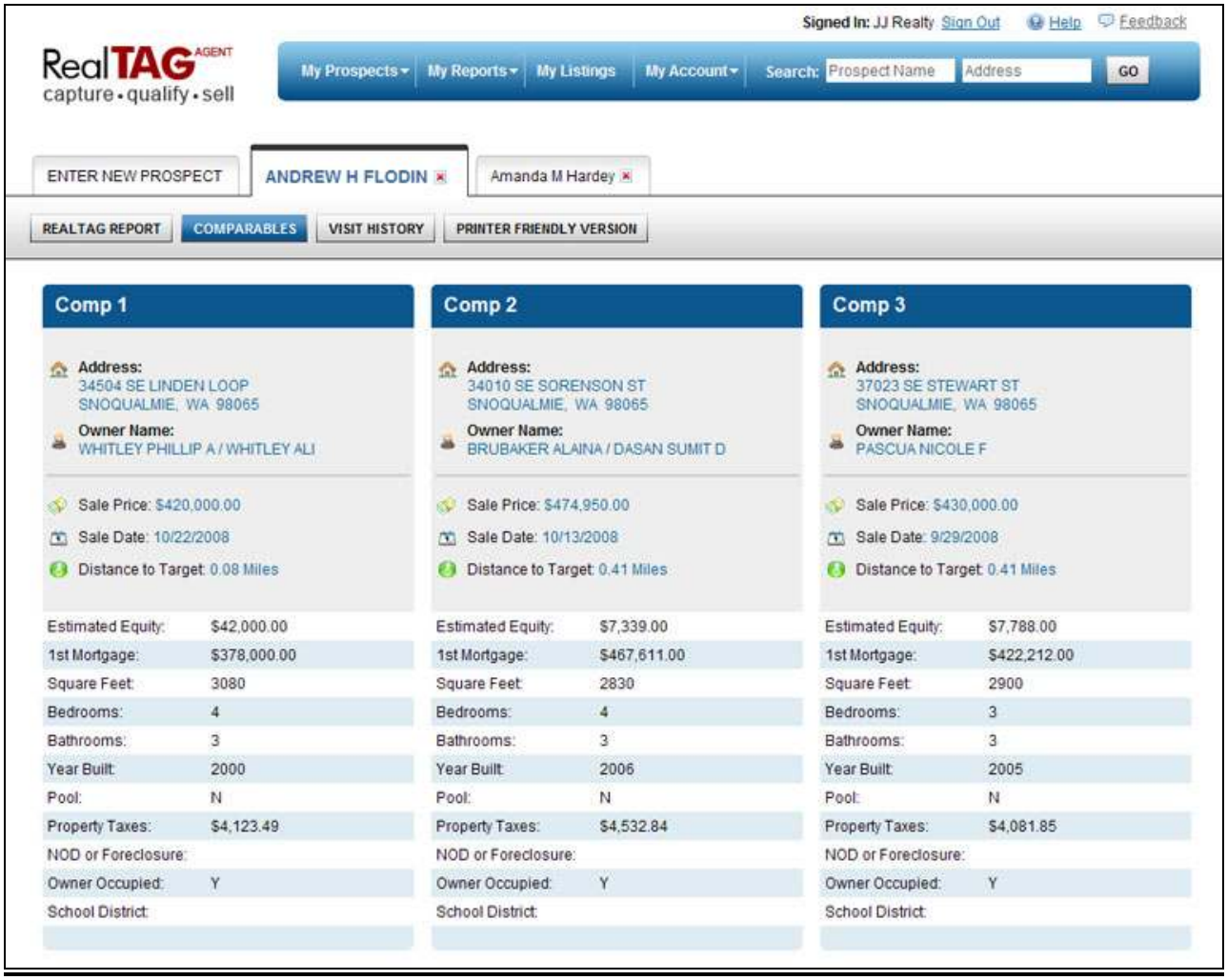
Recent Comparable Sales Screen

RealTAG automatically pulls three recent sales to give you an idea of activity within the prospects neighborhood.



Field Definitions

Address: Displays the full address found as a result of the system lookup.

Owner Name: Displays the owner of the property according to title records.

Sale Price: Displays the last sale price according to title records.

Sale Date: Displays the last sale date according to title records.

Distance to target: Displays distance to the RealTAG subject property.

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Estimated Equity: Displays the estimated equity at the time of closing.

1st Mortgage Amount: Displays the amount of the first mortgage lien on the property.

Square Feet: Displays the square feet of the house according to public record as the result of a system lookup.

Bedrooms: Displays the number of bedrooms of the property according to public record as the result of a system lookup.

Bathrooms: Displays the number of bathrooms of the property according to public record as the result of a system lookup.

Year Built: Displays the year the house was built according to public record as the result of a system lookup.

Pool: Displays information if the property has a pool according to public record as the result of a system lookup.

Property Taxes: Displays the annual property tax amount on the property according to public record as the result of a system lookup.

N.O.D. or F.C.'s on Prop: Displays Yes or No, indicating if there are any Notice of Default or Foreclosure liens on the property.

Owner Occupied: Indicates if the property is owner occupied as reported from the system lookup.

School District: Displays the school district the property is located in according to public record as the result of a system lookup.

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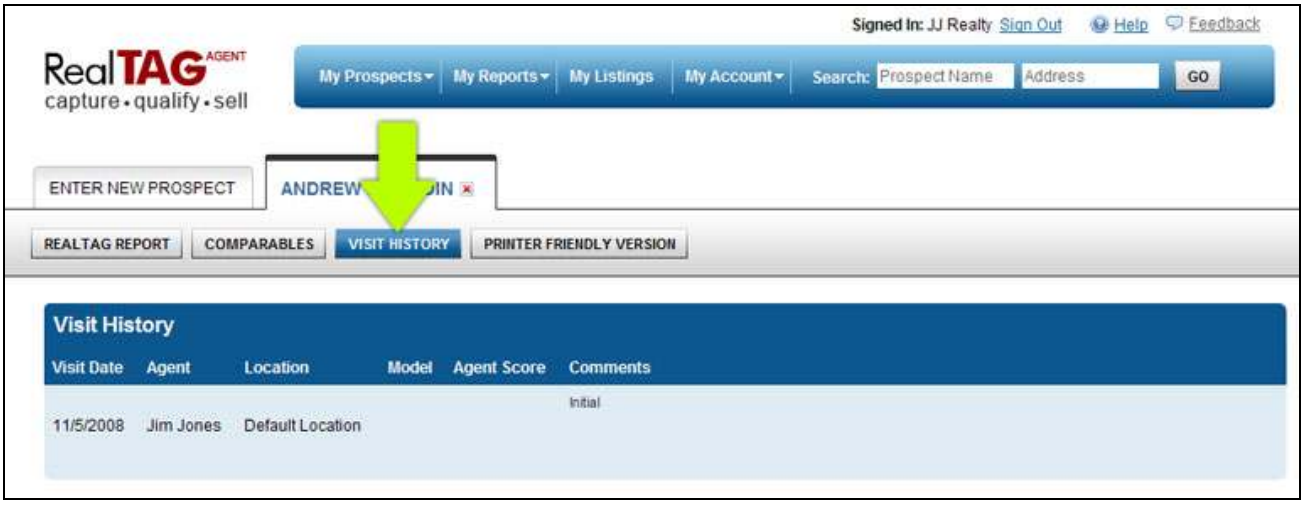
Visit History Screen

To view any prospects visit history, simply run a RealTAG report on the prospect, and then click on the “Visit History” button. Once you are on the “Visit History” page, you are able to view all of the visits that the prospect made (provided that a RealTAG report was generated), along with the time and date stamp of the visit.



Field Definitions:

Visit Date: The date / time that the RealTAG report was run on the prospect.

Listing: RealTAG associates prospects, (potential clients), with the place that you met them. In this instance Location indicates the place that the RealTAG report was run was the “Buena Vista” listing / location.

Agent Score: This field is the opinion of the agent who interacted with the prospect. There are 6 ratings, A-F, that you can select from. In order to support your opinion, please enter comments about this visit.

Comments: Enter any comments you have about the prospect. The comments must be limited to 250 characters. If you have more comments, update the prospect a second time.

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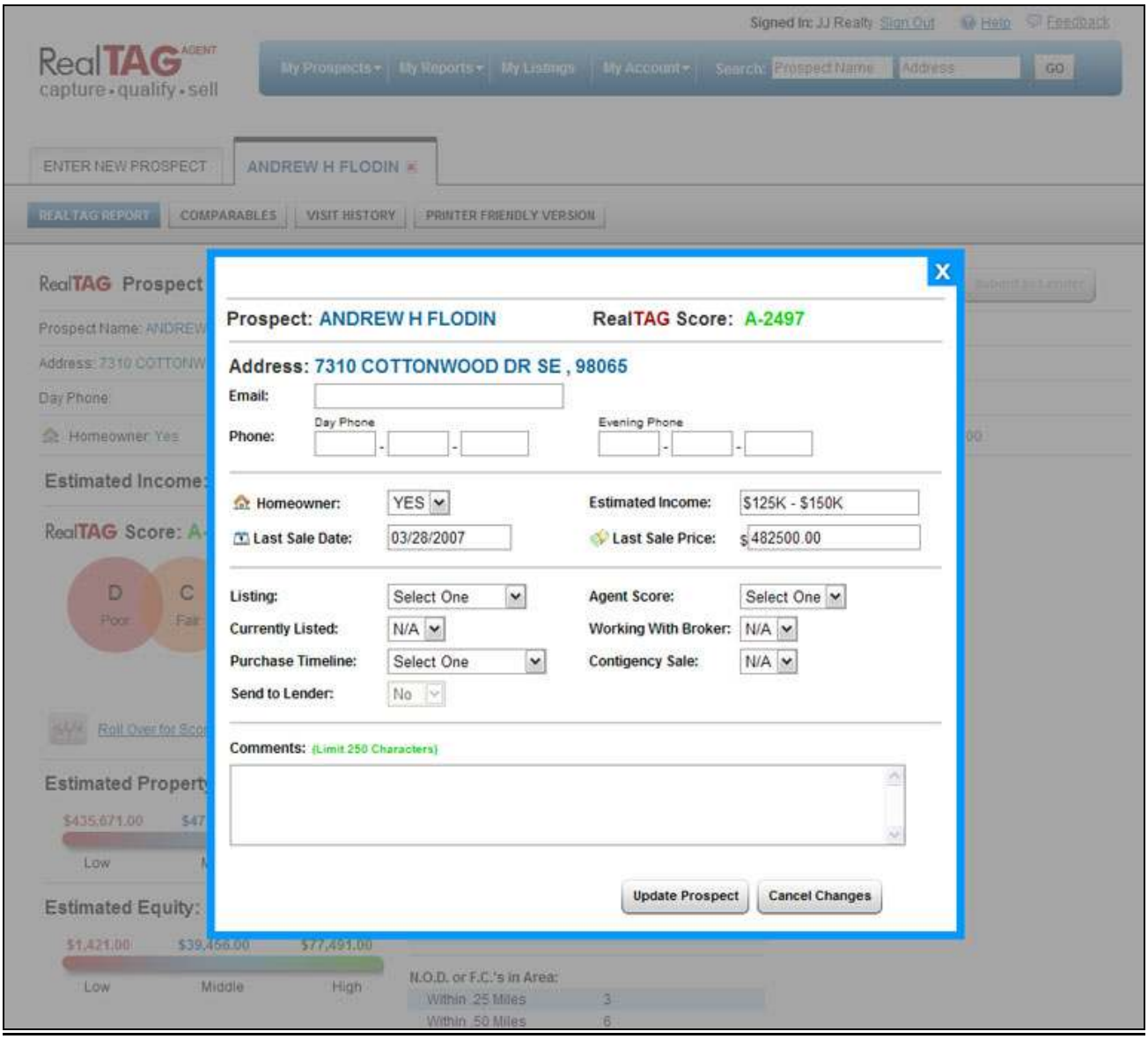
Update Prospect Screen

RealTAG allows you to quickly and easily modify the RealTAG record of each of your prospects, as well as over ride many of the data points that the system delivers.



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Field Definitions

Prospect: Displays the prospect's full name as entered by the agent. This field is not editable.

RealTAG Score: Displays the prospect's score as calculated by the system. This field is not editable.

Address: Displays the prospect's address as entered by the agent.

Email: Enter the prospect's email address. This will allow marketing emails to be sent to the prospect. The email address must include the "@" symbol and end with a domain such as ".com."

Day Phone: Enter the prospect's day time phone number. The first box should contain the area code. Each part of the phone number can contain only numbers.

Evening Phone: Enter the prospect's day time phone number. The first box should contain the area code. Each part of the phone number can contain only numbers.

Homeowner: This field indicates whether or not the prospect owns the property. It is useful in sorting prospects by those who already own the property and those who may be renters. The Homeowner field is automatically populated if the property information is found in our database. If you would like to update it, please select "Yes" if the prospect owns the property, select "No" if the homeowner does not own the property, and select "N/A" if you do not know or this information does not apply.

Estimated Income: This field shows the amount of income the prospect is estimated to earn based on information about their property as calculated by the system. You may update this field if you have more current information and you will lose the estimate from the system. Amounts generated by the system will show as a range.

Last Sale Date: This field shows the date the property was last purchased. It is automatically populated if the property information is found in our database. To update this field, enter a date in this format: mm/dd/yyyy.

Last Sale Price: This field shows the price of the property when it was last purchased. It is automatically populated if the property information is found in our database. To update this field, enter a dollar amount without commas and include a decimal point.

Agent Score: This field is the opinion of the agent who interacted with the prospect. There are 6 ratings, A-F, that you can select from. In order to support your opinion, please enter comments about this visit.

Currently Listed: This field shows whether or not the prospect has already listed their property in preparation for buying and moving into another one. This field must be updated

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from information the agent discovers when talking with the prospect because it is not populated by the system. Select “N/A” if the prospect does not own the property or if they are not going to sell the property before moving.

Working with Broker: This field shows whether or not the prospect is currently working with a broker to sell their current house. It shows the motivation of the prospect who is actively trying to sell their current property. This field must be updated from information the agent discovers when talking with the prospect because it is not populated by the system. Select “N/A” if the prospect does not own the property or if they are not going to sell the property before moving.

Purchase Timeline: This field indicates how soon a prospect is looking to move. This field must be updated from information the agent discovers when talking with the prospect because it is not populated by the system.

Contingency Sale: This field indicates whether or not the prospect must first sell their current property before buying and moving into a new property. This field must be updated from information the agent discovers when talking with the prospect because it is not populated by the system.

Send To Lender: If you would like to send information about this prospect to your lender as a referral, select Yes.

Comments: Enter any comments you have about the prospect. The comments must be limited to 250 characters.

Update Prospect button: Click the Update Prospect button when you have entered in all the information and you want to save. You can view a history of comments on the Visit History page or at the bottom of the Prospect Report.

Cancel Changes button: If you don’t want to save your updates to the Prospect, click the Cancel Changes button.

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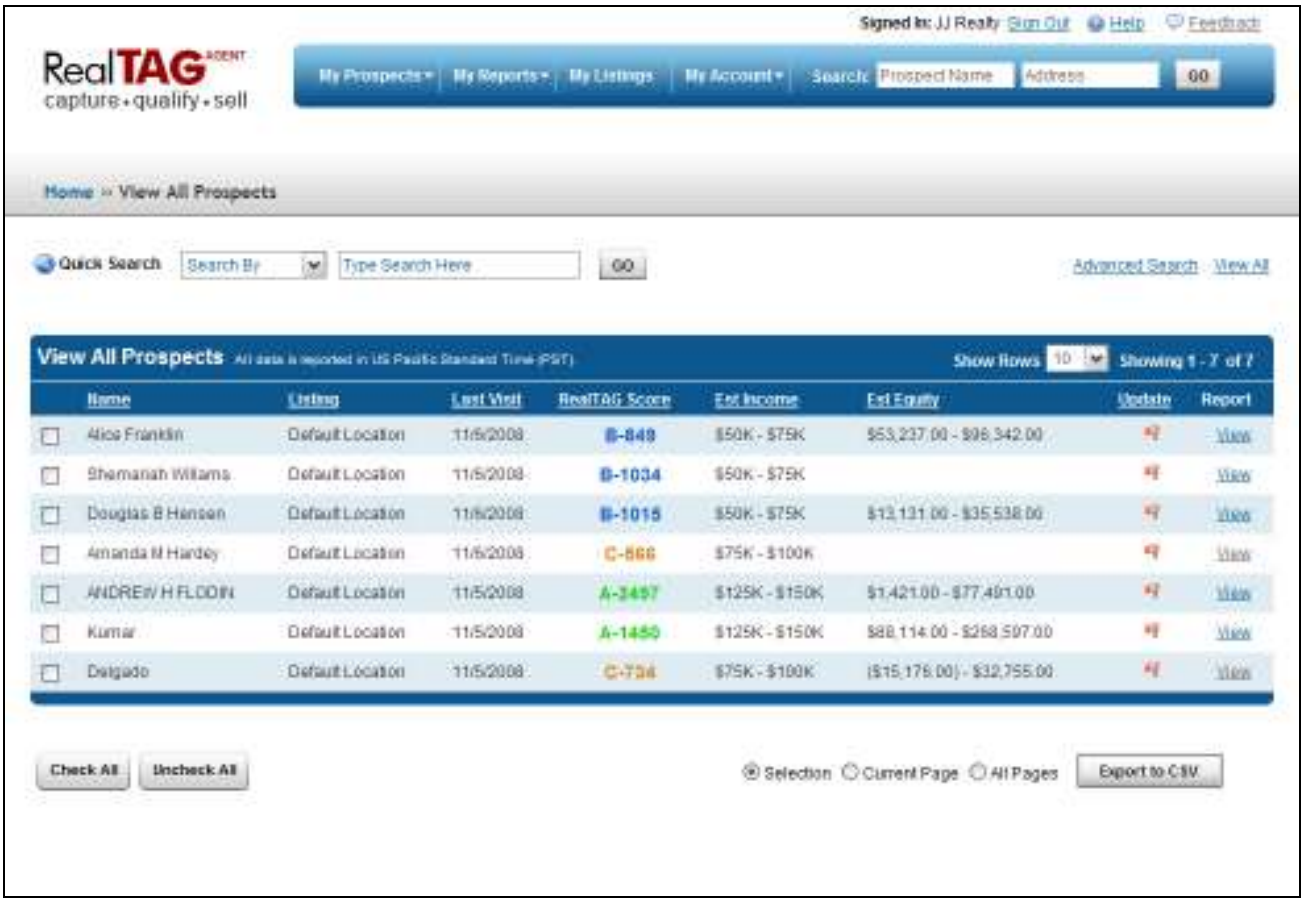
The My Prospects Menu

Enter New Prospect Screen
See Page 5

Prospect List Screen
The Prospect List Screen lists recent traffic input into the RealTAG system. Traffic can be sorted by clicking on the various field headings at the top of the list. By default, the system displays traffic by last entered, first.



Exporting Your Prospects
Why would you want to export your prospects to CSV? CSV is a Comma Separated List of data that is easily imported by many other systems and commonly viewed using Microsoft Excel. You can use a CSV file to load prospects into your CRM or Lead Management software. You can use the file to populate address labels to send follow up direct mail.

You may select the prospects that you would like to export and then click on the “Export to CSV” button to save the resulting file to your local computer.

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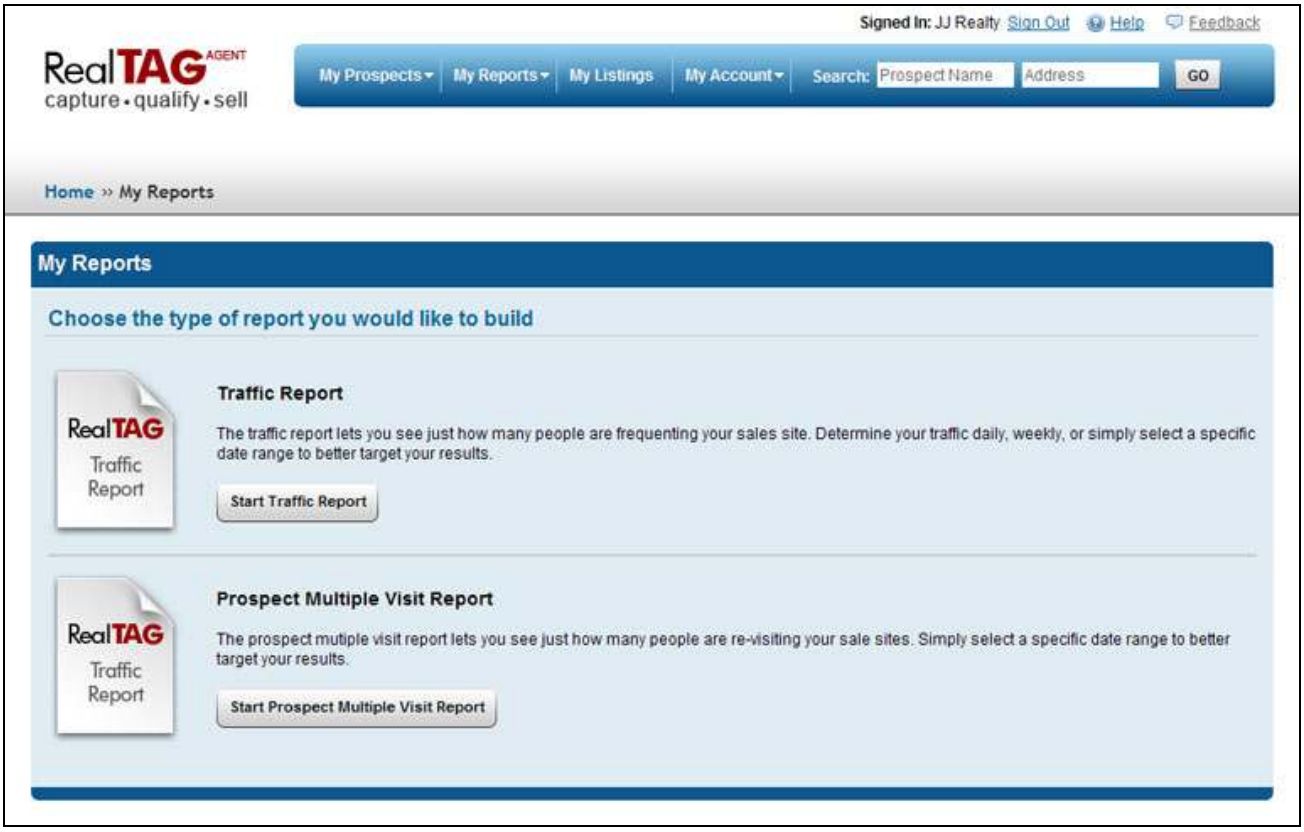
The My Reports Menu

Main Reports Screen

The Main Reports Screen contains built in templates for reporting on your RealTAG traffic. Currently there are two pre-defined reports included in RealTAG:

- The Traffic Report
- Prospect Multi Visit Report



Additionally, RealTAG allows you to sort and view your RealTAG traffic via the search features (see Page 14), as well as allowing export into your CRM via CSV (see page 17).

Traffic Report Screen

The Agent and Traffic Report Screens allow you the ability to choose multiple variables to select only the potential prospects that you wish.

Below is a screen capture of the Traffic Report Screen.

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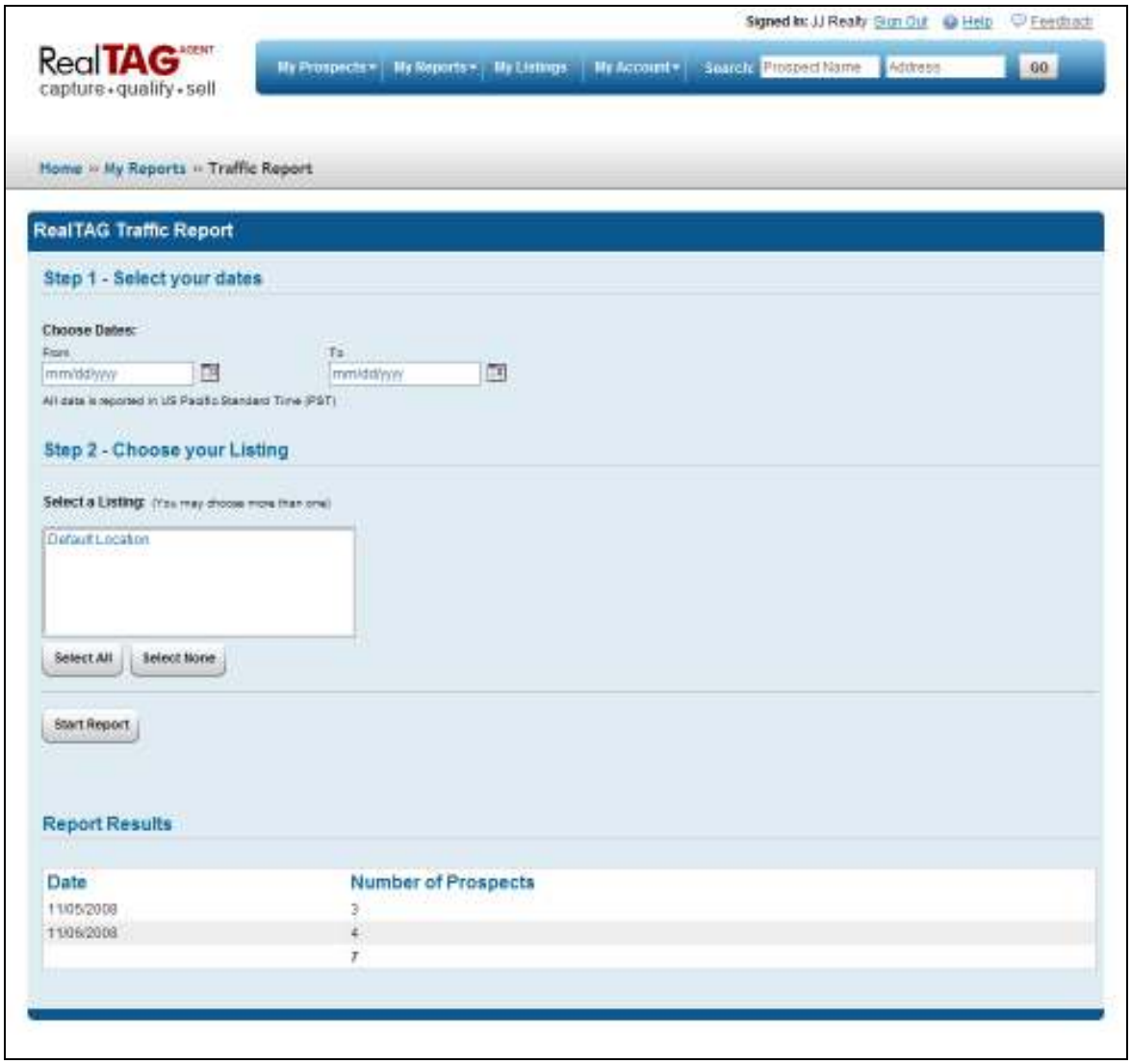

1. To run a report. Select the date range that you wish to search within
2. Select the listing location
3. Click the “Start Report” button

Multiple Visit Report Screen

The Multiple Visit Report Screen allows you the ability to choose multiple variables to select only the potential prospects that you wish.

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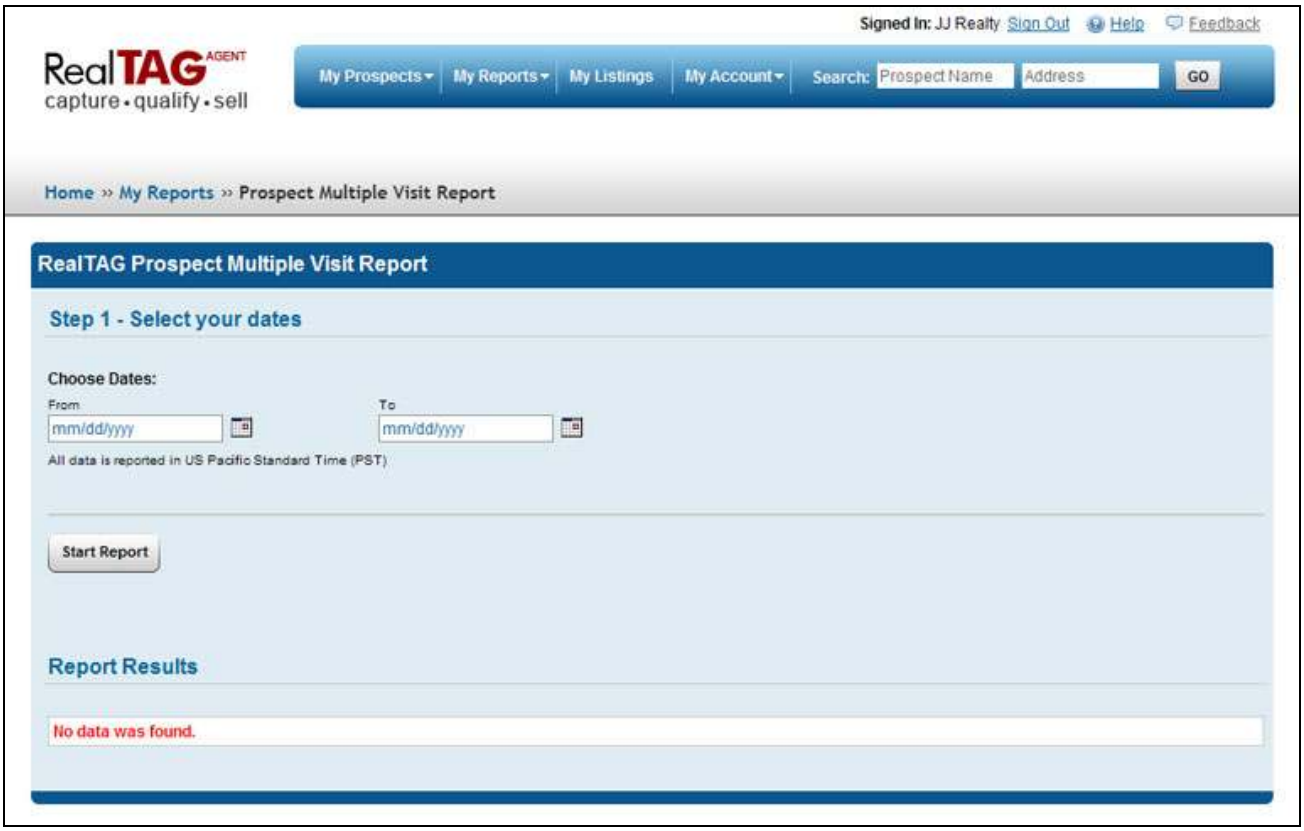

1. To run a report. Select the date range that you wish to search within
2. Click the “Start Report” button

The My Listings Menu

RealTAG associates prospects, (potential clients), with the place that you met them. As part of your initial setup process, RealTAG creates one listing for you, (Default Listing).

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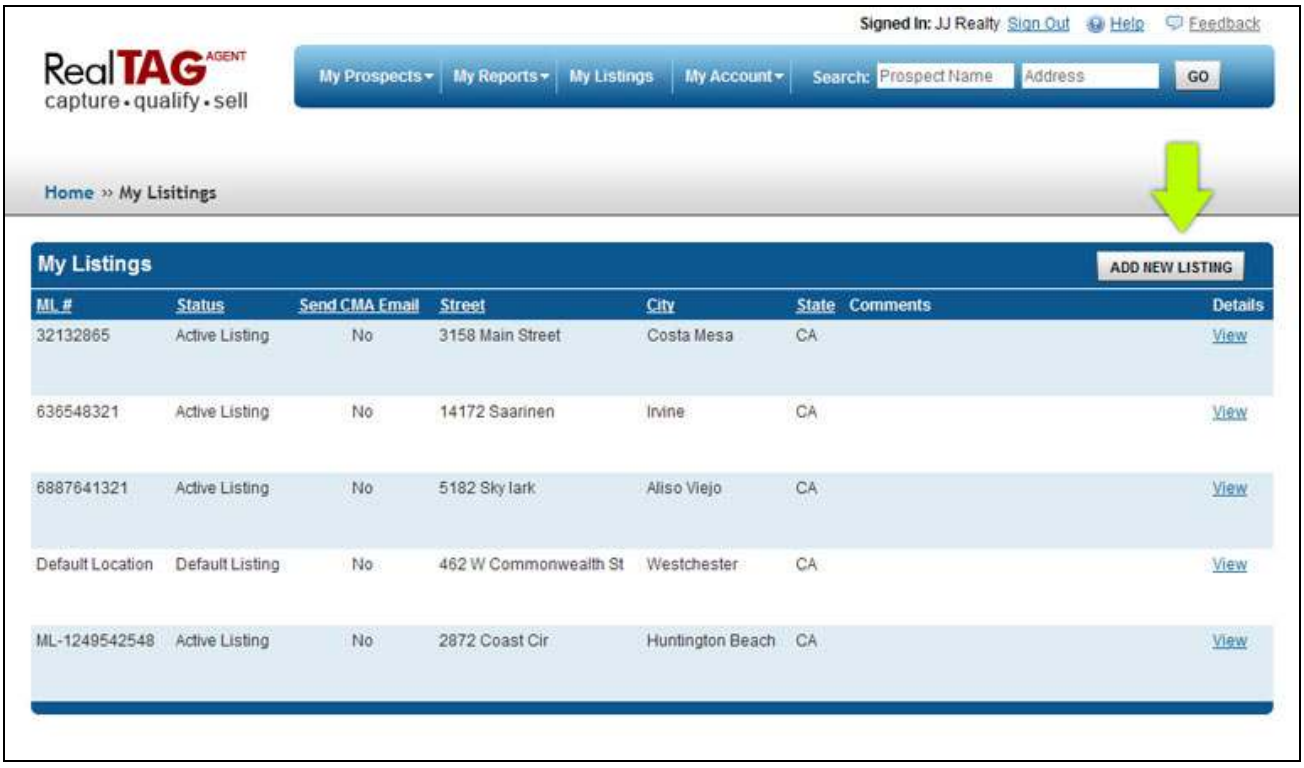

Field Definitions:

ML#: The MLS number of your listing (agent input).

Status: What is the listing's current status (agent input).

Send CMA (Competitive Market Analysis) Email: Toggles whether you would like a RealTAG generated CMA email to be sent to your prospect automatically (if you have input the prospect's delivery email address).

Street: The listings street addresses (agent input).

City: The Listings City (agent input).

State: The Listings State (agent input).

Comments: Any comments that you would like to be visible to the public regarding the listing, (agent input).

My Listings Page

Setting up a new listing in RealTAG is easy and straightforward. From the My Listings page, click on the "Add new listing" button in the upper right hand corner of the page.

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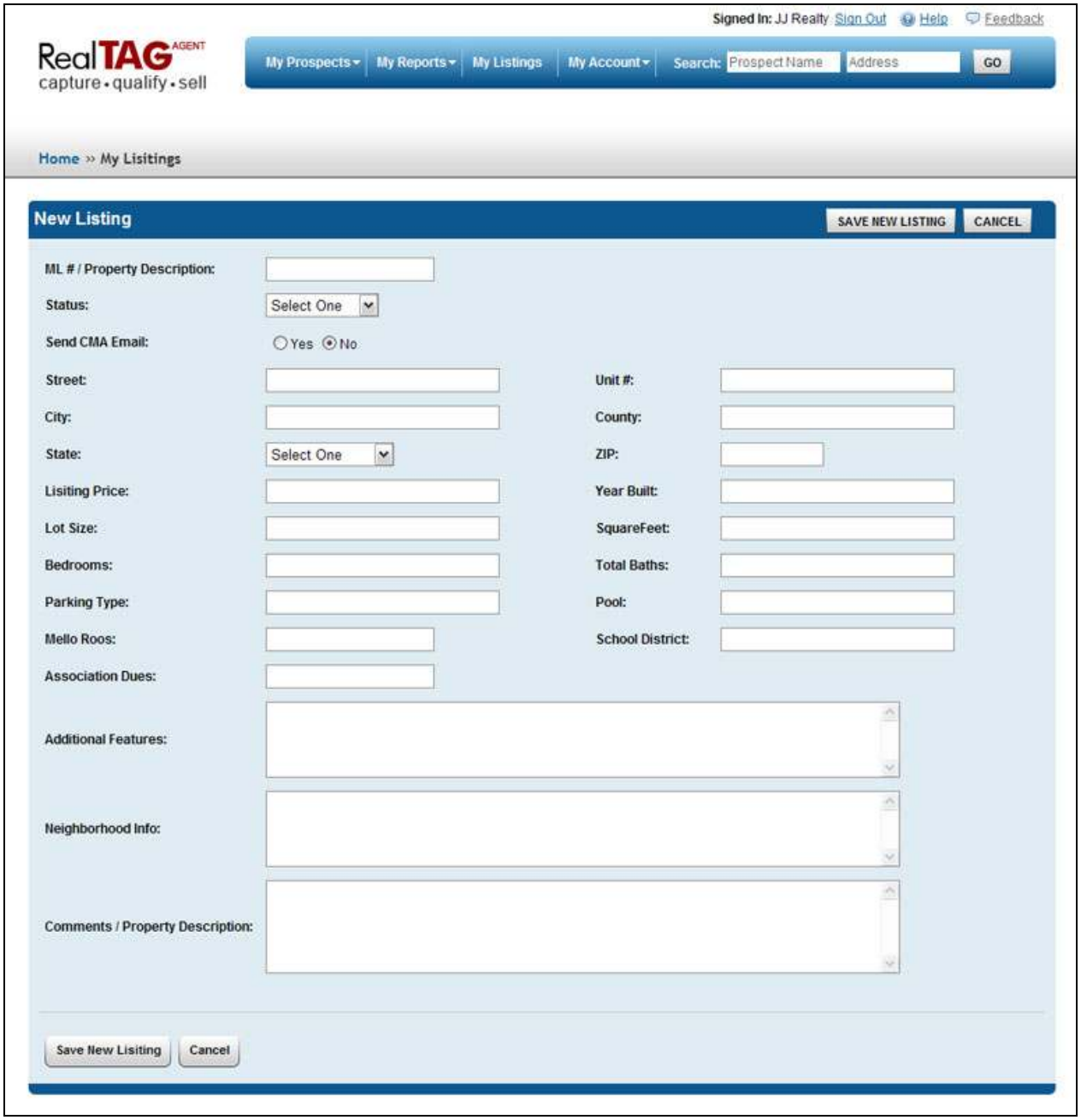
Please remember, entering a listing into RealTAG is entirely optional. A consumer would only see the listing information that you input if you have both enabled the “Send CMA Email” option, and gotten the prospect’s email address, (for delivery).



To add a new listing, simply fill out the fields as indicated, and click on the “Save New Listing” button.

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If you wish to abandon any changes that you have made, simply click on the “Cancel” button.

Field Definitions:

Most of the fields that are available in the new listing page are simple, self explanatory fields describing the property that you are listing. However, there are a few RealTAG specific fields that you should know about.

ML#: The MLS number of your listing (agent input).

Status: What is the listing’s current status (agent input).

Send CMA (Competitive Market Analysis) Email: Toggles whether you would like a RealTAG generated CMA email to be sent to your prospect automatically (if you have input the prospect’s delivery email address).

Additional features: Any additional features about the property that you would like to be visible to the public, (agent input).

Neighborhood Info: Any additional features about the neighborhood that you would like to be visible to the public, (agent input).

Comments: Any comments that you would like to be visible to the public regarding the listing, (agent input).

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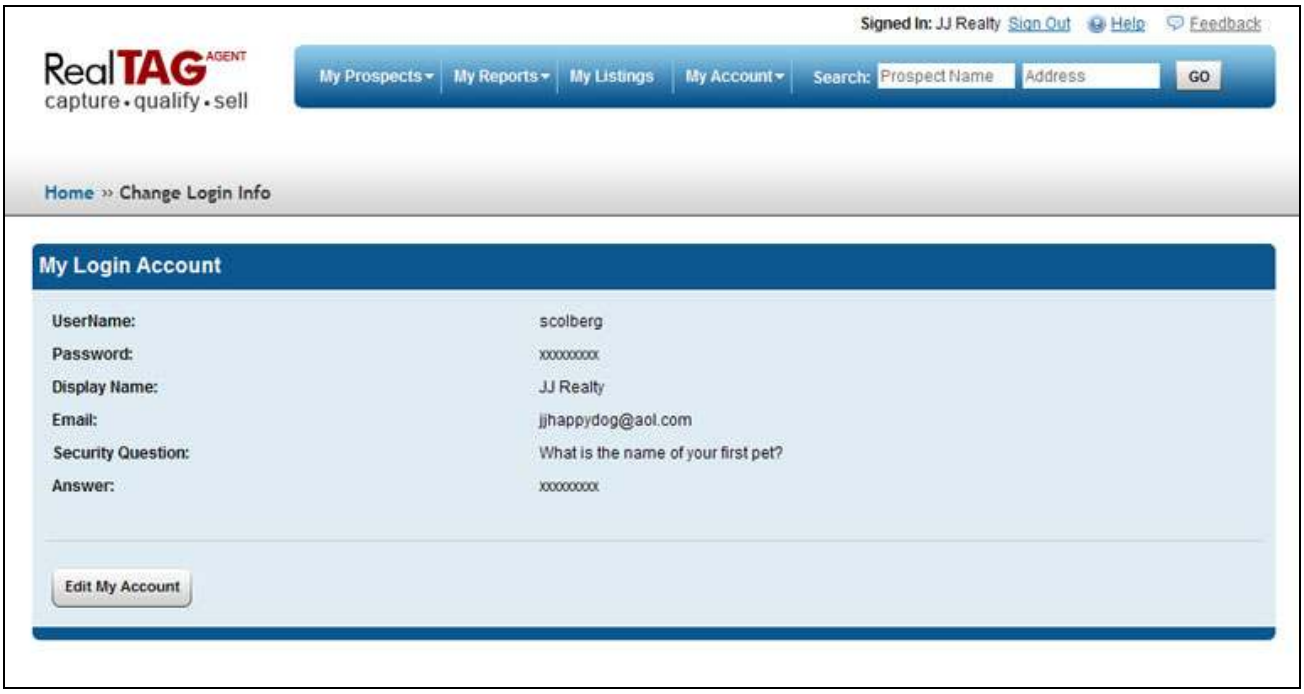
The My Account Menu

Change Login Info Screen

On the Change Login info page, you will find the current user name, password, etc. for your account. If you would like to change any of the user options, simply click on the “Edit My Account” button at the bottom left corner of the page.



Field Definitions

UserName: Displays the current username for your account.

Password: Displays the password in “X” format. Your password is changeable by clicking on the “Edit My Account” button.

Display Name: Displays the name that is displayed on your account, and on printable reports.

Email: Displays the name email address that you singed up with.

Security Question: Displays the security question that you picked to reset your password / username.

Answer: Displays the answer to your security question in X” format. Your security question is changeable by clicking on the “Edit My Account” button.

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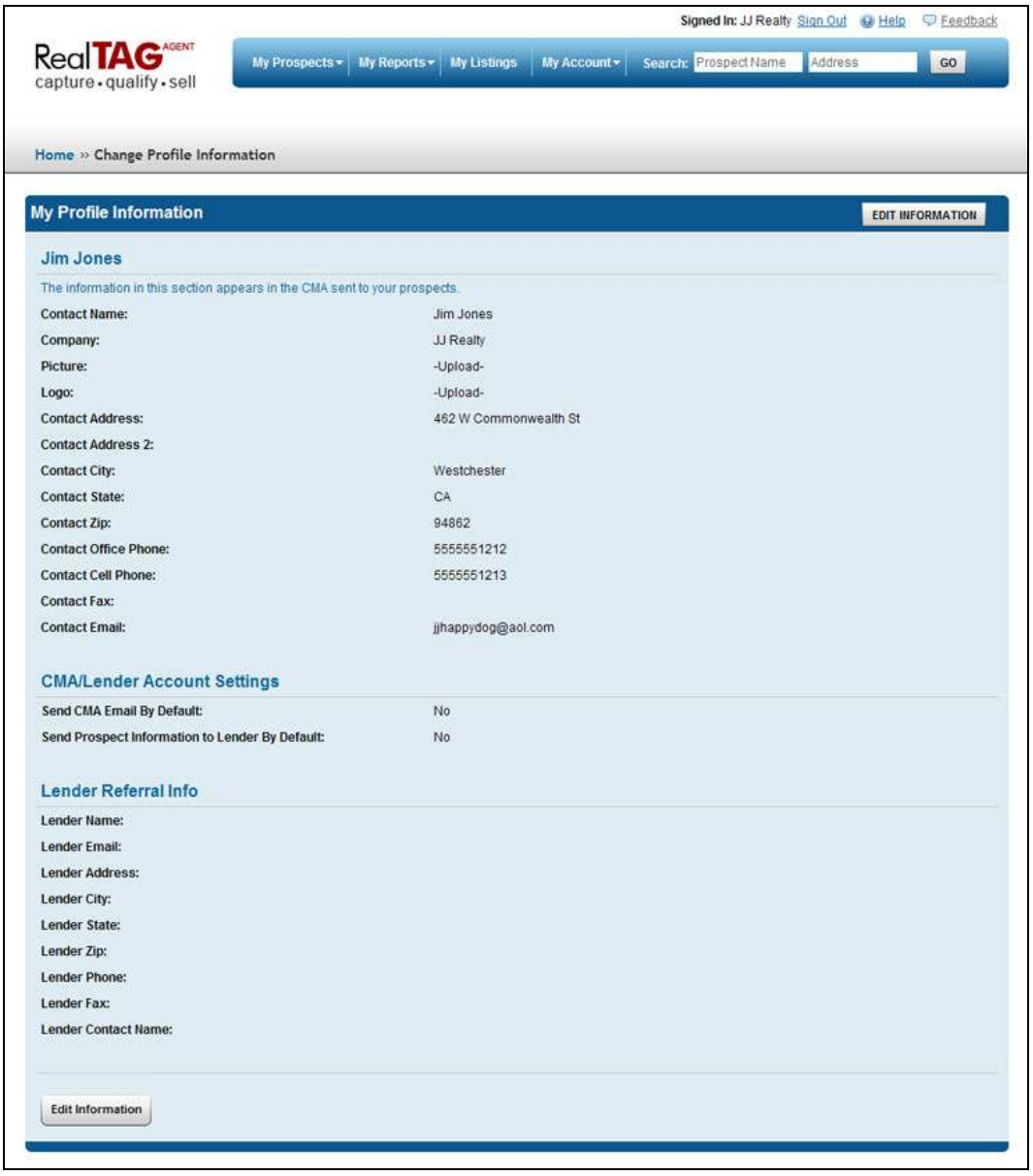
Change profile info

The My Profile page is an important page within RealTAG. The My Profile is split into three sections:

- Your profile information (displayed to prospects)
- CMA / Lender Account settings
- Lender Referral Info



Your Profile Section

By clicking on the Edit Information button, you can add or update your profile by typing in the text boxes on the page. Some of your profile information was populated using information that you supplied during the account set-up.

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You should review your profile before using RealTAG to send CMA emails to prospects.

Uploading Your Picture and Logo for use in the CMA Email

Upload Agent Picture - Click on the Upload Agent Picture button. A Windows file upload box will appear on the screen. Navigate to the picture and click upload. The agent picture should be 100 by 100 pixels or smaller. Use any of the following file formats: .jpg, .png, or .gif. File size should be smaller than 20K.

Upload Logo - Click on the Upload Logo button. A Windows file upload box will appear on the screen. Navigate to the picture and click on upload. The agent picture should be 150 by 100 pixels or smaller. Use any of the following file formats: .jpg, .png, or .gif. File size should be smaller than 20K.

CMA / Lender Account Settings Section

Send CMA Email By Default

Select **Yes** when you are ready to have RealTAG send the Prospect a CMA (Competitive Market Analysis) email by default. **You can preview the email by choosing Preview Email from the My Reports tab on the blue menu bar.**

Send Prospect Information to Lender By Default

Select "**Yes**" if you would like to have RealTAG forward prospect reports to your lending partner automatically. You must complete the information in the Lender Referral Info section of this page.

Lender referral Info

If you have a lender that you work with, and would like to automatically receive all of your RealTAG reports, (as leads), fill in all of their contact information.

When you are done, click on the "Save New User" button at the bottom of the window.

To abandon any changes made, click on the "Cancel Changes" button.

Account Info

On the Account Info page you are able to view:

- Your current RealTAG package
- Your current account status (number of RealTAG reports run, etc).
- Your transaction history

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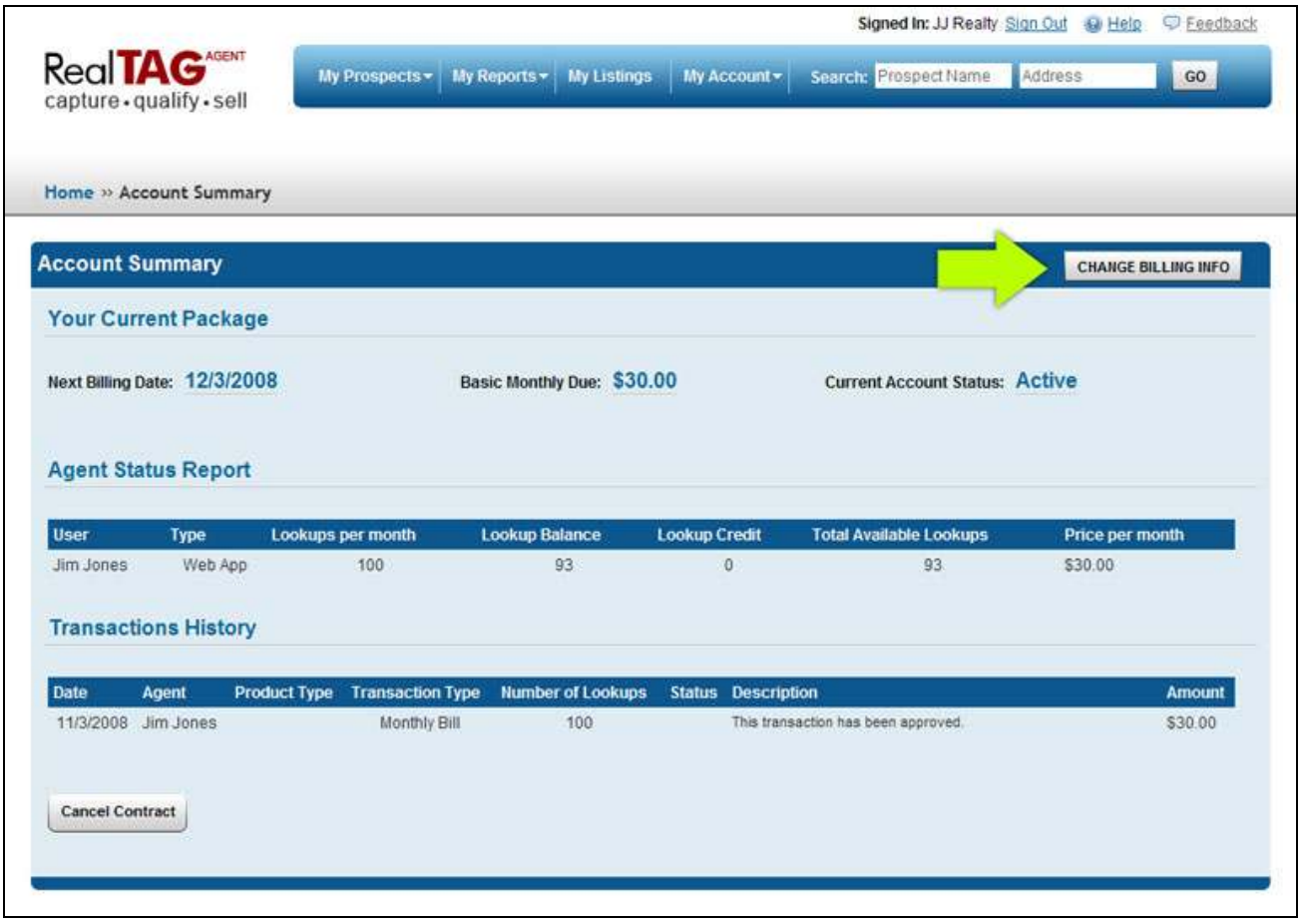
You can also update your billing (credit card) information or cancel the RealTAG service.



Change Billing Info

If you need to review, or change your billing information, click on the “Change Billing Info” button in the upper right hand corner of your screen.

To update any information, click on the “Edit My Billing Info” button. Make the necessary changes and Click on the “Update Billing Info” button.

My Profile Information

On the Agent Info page, you will find your user profile. This information is used to populate any emails generated by the system. Also if you choose to use the “refer to lender” system the information for the lender is entered here as well. If you would like to change any of the information, click on the “Edit My Account” button at the bottom left corner of the page.

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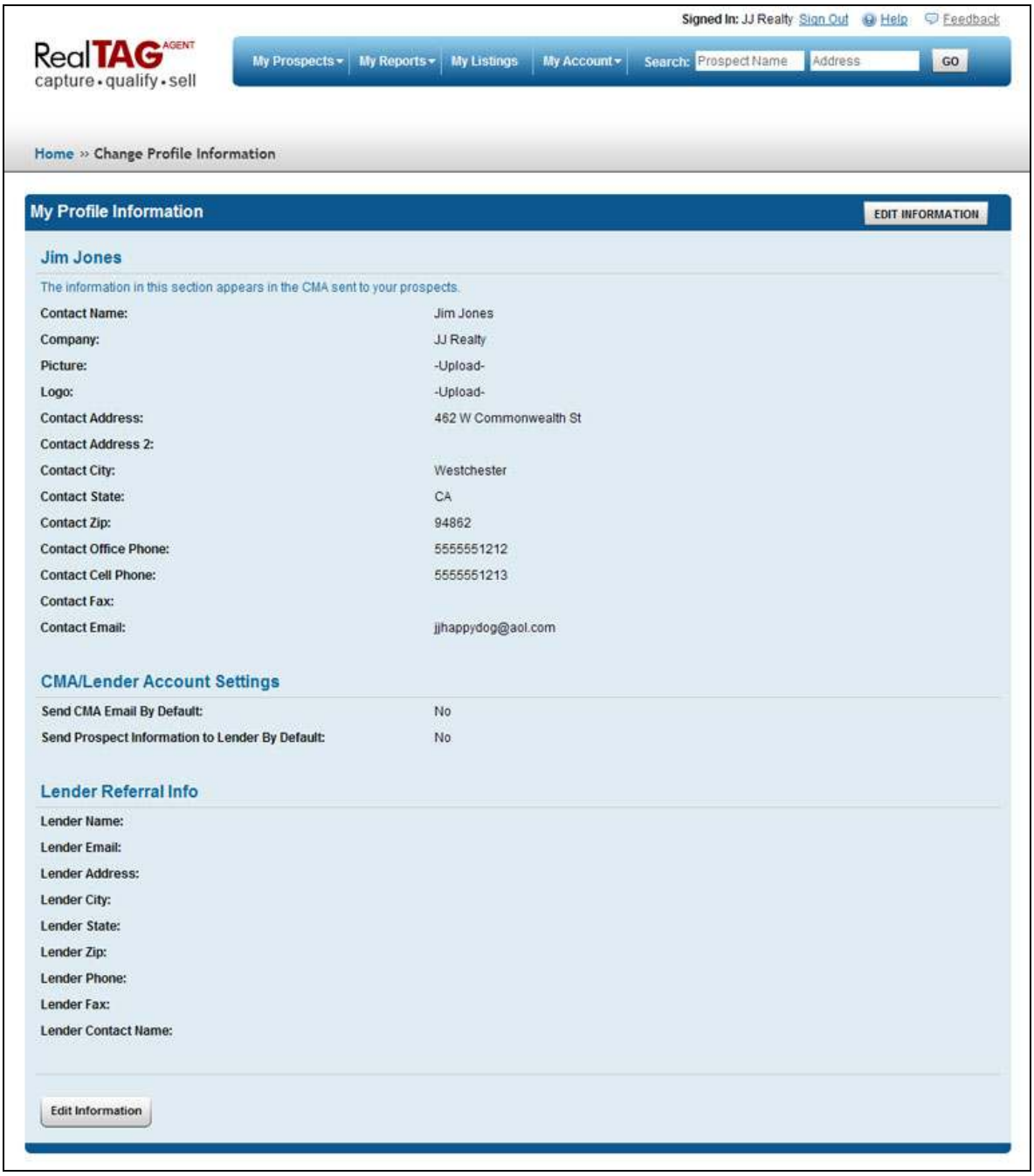

Fill out the requested fields completely, and then click on the “Save User Info” button to finish entering your new user.

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Billing Info Page

On the Billing Info page, you will find your billing summary and billing information.

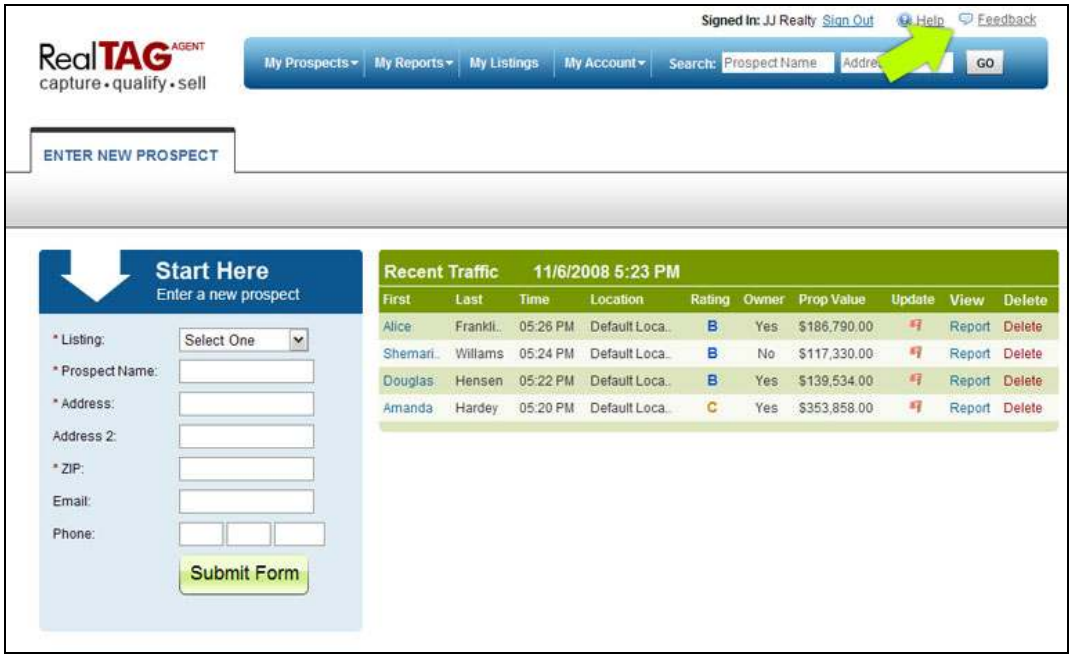
Next Billing Date: Your account will be billed anniversary date to anniversary date.
Monthly Fee: The recurring charge or ongoing access to the system

Lookups per month: You are allocated a fixed number of lookups per period. Lookups in excess of the monthly allotment are automatically charged.

Lookup Balance: The remaining lookups available in the current period. Lookups do not carry over into the next period.

How to Get More Help

Your feedback is very important to us. If you find features that you would like, or features that you dislike with the RealTAG system, please tell us about it! Simply click on the feedback button at the top right corner of each page, and fill out the resulting form.



Our feedback system is easy to use, and puts your comments right in the hands of the people that can make a difference, (our programming staff).

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