Tempo 5 Client Gateway

www.sandicor.com

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WHAT IS CLIENT GATEWAY?

The Tempo Client Gateway is an easy to create, personalized web site for your clients! Branded with your contact information and utilizing current property data from Tempo, it is the perfect solution for providing your clients with personalized searches and property viewing options.

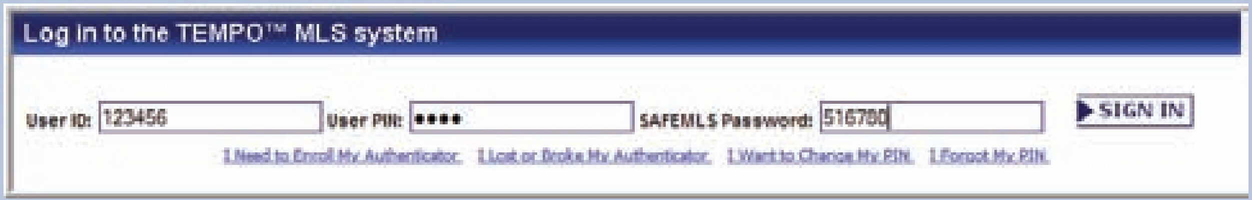
Other unique features include an opportunity for your clients to save their favorites accompanied by personal comments. Best of all, Client Gateway is provided at no additional charge to our members.

GETTING STARTED IN CLIENT GATEWAY

When utilizing Client Gateway, each of your clients will receive relevant search results branded with your personal contact information. Therefore, when you begin utilizing Client Gateway there are required fields of data that must be completed in order to provide clients with this information. Once you have entered and saved this information, it can be used as an automatic default for any client search created.

HOW TO LOG ON (you must have your SAFEMLS token)

1. Access Sandicor's website: www.sandicor.com
2. Click the **Tempo** link at the left.
3. Enter **User ID** (agent public ID).
4. Enter **PIN** number (4 digit number created by agent during registration of token)
5. Enter **SAFEMLS Password** (obtained by pressing round button on token and entering numbers or the letters/numbers displayed. Click **Sign In**.

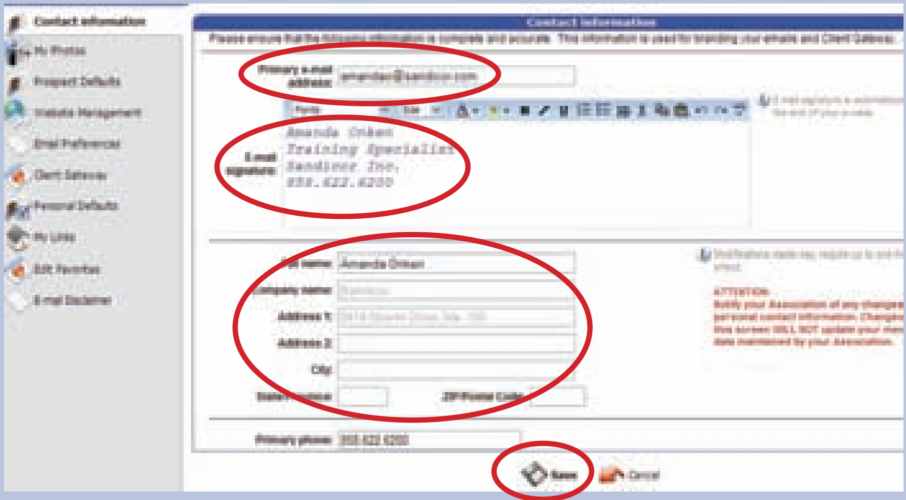


ADD PERSONAL CONTACT INFORMATION

1. Go to the Tempo Home Page.

2. From the top navigation bar, hover over **My Tools** located on the right side of the screen, then click on **Preferences**.

3. On the **Contact Information** screen key in your information for the indicated fields, then click the **Save** button at the bottom of the screen.
   Note: If you want to change any fields that are grayed out, you must contact your local Association to get them changed.

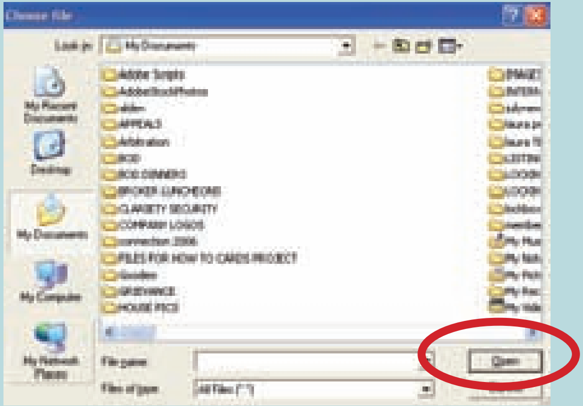


ADD PERSONAL PHOTO

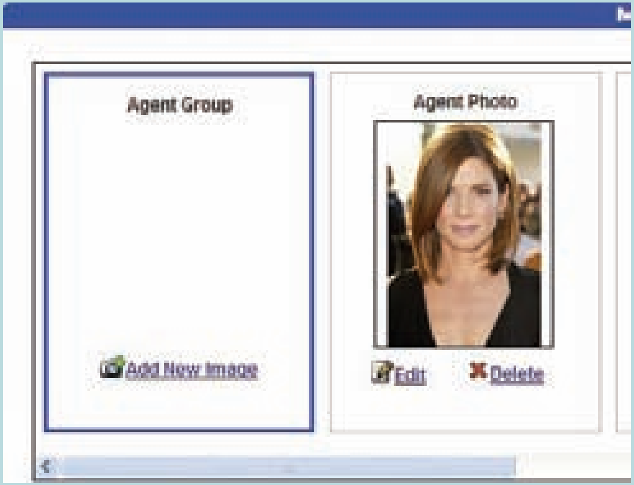
Note: Before you start to add your photo, make sure it is available on your computer, CD or flash drive.

1. From the top navigation bar, hover over **My Tools**, then click on **Preferences**.
2. In the **My Preferences & Settings** section at the left, click on **My Photos**.
   Note: If you are an individual agent, be sure to add the photo in the second slot under Agent Photo—the first slot is for agent group (team) photos.
3. Click on **Add New Image**.
4. Click **Browse** to find the desired photo on your computer, CD or flash drive.

5. A **Choose File** screen will appear. Click on the photo you want to use and then click the **Open** button on the lower right.

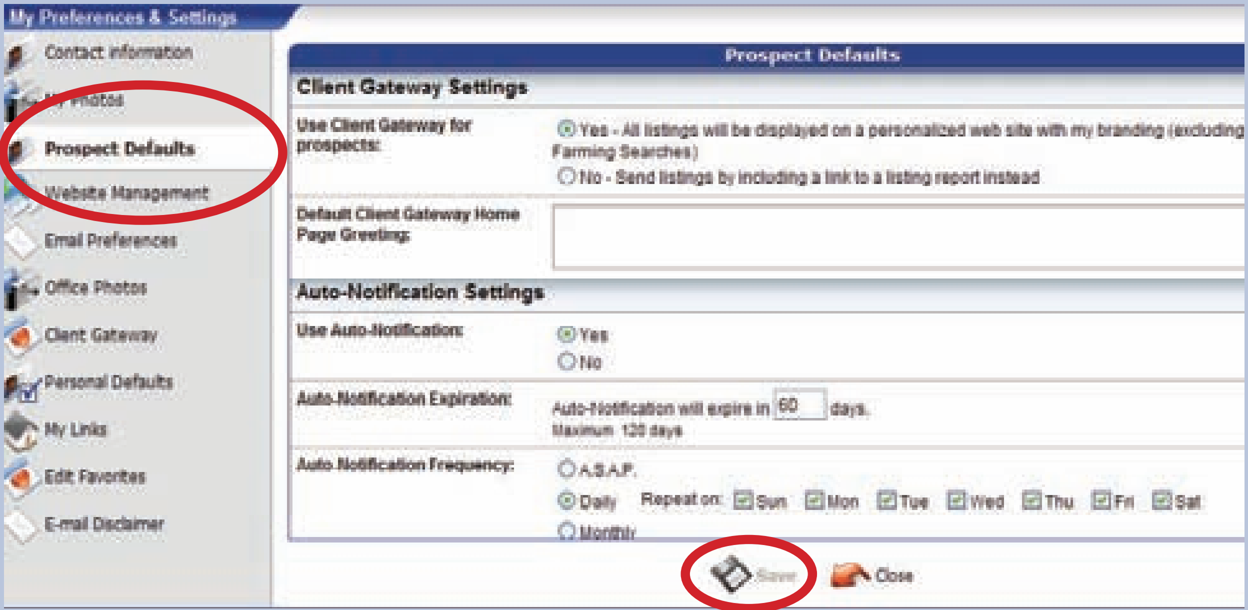


6. The **Choose File** screen will appear with the photo you have selected. Click on the **Save** button located on the lower right.
7. The **Edit Image Screen** will appear again. Click on the **Save** button at the lower right.
8. The photo you saved will appear. You are given room to add six personal photos including those of yourself, your partner or an assistant.



CREATE DEFAULT SETTINGS FOR PROSPECTS

1. In the **My Preferences & Settings** section at the left, click on **Prospect Defaults**.
2. Review and complete all criteria options. Be sure to scroll down the page to view the entire list of default options. The default settings include the prospect's email address, the subject line and standard greeting for email notification, the use of auto-notification, the frequency of auto-notification, and the expiration date for auto-notifications.



3. Click the **Save** button at the bottom of the screen.

COMPLETE CLIENT GATEWAY BRANDING CONTENT

1. In the **My Preferences & Settings** section at the left, click on Client Gateway.
2. Check mark the items you wish to display along the left-hand side of each Client Gateway created for your prospects.
   *Note: If there are any items which you are unable to check mark, it's because they are not yet loaded. Go to the specific area in **My Preferences & Settings** and get them loaded, then come back to check mark the item.*

3. Be sure to scroll to the bottom of the page to check mark the **Show Listing Addresses** box. If you don't check mark it, property addresses will not be visible on the Client Gateway and the properties will not be able to be mapped.
4. Click the **Save** button at the bottom of the page.

CREATING A PROSPECT RECORD

A prospect record is a customized search you have created for a contact. The results of those customized searches are sent to the contact as a branded website with links to the properties matching the search criteria.

1. From the top navigation bar, hover on **Search**, then click on the Property Type you wish to search.
2. Select search options for at least one of the required fields (highlighted in red text), then enter criteria for other desired fields. Click the **Save Search** button at the bottom right of the screen.
3. On the **Search Settings** screen, key in a **Search Name** and a **Search Description**.
4. For **Search Type** click on the drop-down arrow and choose **Prospect Search - Attached to a new Contact**. Click the **Save** button at the bottom of the page.
5. The **Prospect Wizard** will appear. At a minimum you must key in the Prospect's **First Name**, **Last Name** and **Email Address**, then click the **Next Step** button at the bottom right side of the screen.
6. Enable Client Gateway by choosing the Yes circle located at the top of the screen.
7. Enter a **Client Gateway Homepage Greeting**, then click the **Next Step** button at the bottom right of the screen.
8. Complete the **Auto-Notification Settings** and then click the **Next Step** button.
9. On the **Select Listings to Send Now** screen, by clicking on the **Review these listings now** link you have the option to review the properties to be sent in the initial email and to Recommend or Reject any of them prior to sending.
10. Click the **Next Step** button to add any comments to the email and then click **Finish**. The email will go to the Prospect, and beginning the next day the auto-notification will begin.

For Additional Help:

Sandicor Training At Your Office (groups of 6+)
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