



VoicePad MobileIDX Information


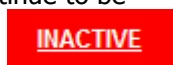
Login:

- A. The login page can always be found at <http://admin.voicepad.com>.
- B. Your username will be emailed to you, as well as available at training and from your office administrator. You may record your username here if you like _____.
- C. Your password is the last 4 digits of the phone number you have listed as your primary contact number in the MLS system. You will be prompted to change it once you log in.
- D. Your Account Type is "Agent." Click the "Login" button to enter.
You've been prompted to change your password to something more secure and more memorable for you: 4-6 digits, numbers only. You may record it here if you like:
_____.

Welcome Pages:

- A. Accept the VoicePad Terms of Use.
- B. Confirm your Contact Information: ensure that your email address and best contact number (usually a cell phone) are correct, and change if necessary. Select your wireless carrier from the list if you would like to activate text lead notification. Please note that if your phone number changes you will need to change it in your VoicePad profile.
- C. Record your Contact Name: ensure the phone number listed is correct and click the "Record Now" button. Eve will call you directly to record your contact information (personal name and company name) to be played at the end of each presentation. (If you are unable to record your contact name at this time don't worry; you will always have the option to record this at your leisure from within the profile section of your dashboard.)


Enhancing Property Presentations:



- A. To edit a presentation click the green "Active" button. 
 - a. Choose "Presentation Quick Edit" and select which of the 5 pages of presentation you wish to edit.
 - b. On the first page of the property presentation some information will not be available for editing. This information is brought in directly from the MLS system and can only be changed in the MLS system. Though it is not grayed out, the price can also be updated directly by the MLS or it can be updated by you so that callers will immediately hear new pricing information.
 - c. You are not limited to the Interior, Exterior, and Community Amenity options that have been pre-selected from information entered into the MLS system. Please feel free to edit these options as you please. We encourage you to keep in mind the issue of a caller attention span; in our experience it is best to limit your feature selections to 4-5 per page.
 - d. You can also provide callers with additional information about a property by clicking the "Add Additional Information" button and choosing to either record the additional information in your own voice, or by typing it in the text-entry box to be read by our computerized female voice.
- B. A property that is sold, expired, cancelled or withdrawn from the MLS will continue to be represented on your dashboard, but with the status now shown as "Inactive." 
When a property is "inactive," the presentation will still play over the phone for approx. 14 days before being deleted and the listing removed from your dashboard permanently.



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Reporting:

- A. Agent Report: For full information on every call that comes into the system the best place to look is the . This comprehensive report is available directly on your dashboard in an easy-to-read format or can be exported into Excel. Lead Manager provides:
- c. At-a-glance notification of: date and time of call, where a caller was transferred (to agent, mortgage partner, or voicemail), property address of inquiry, and caller ID information.
 - d. Detailed information about the caller, the information requested, the length of the call, and the frequency of calls; all available by clicking the "Details" button for each inquiry.
 - e. Ability to leave notes for self, team members or mortgage partner about the inquiry or caller, available by clicking the "ADD" link in the "Notes" section.
 - f. Ability to schedule a follow-up with built-in email notification, available by clicking the "TO SCHEDULE" link in the "Next Follow-Up" section.
 - g. Sort and filter reports for Excel for printing and extracting specific data, available by clicking the "Sort and Filter Options" or by clicking "Print/Export."
- B. Homeowner Reports: On the far right-hand side of your dashboard is the report section for each property presentation. There are 2 types, the Trend report and the Detail report.

- h.  Trend reports: These are excellent to share with homeowners as they show call data without sharing specific personal call-capture information. This report breaks calls into two kinds, those calls that transferred (represented by a gray bar) and those that didn't transfer (green bar). Transferred calls mean that the caller chose to connect either to the agent, the loan officer, or left a voicemail. While lacking caller information, this report provides a good overview of caller interest throughout the month and can provide an indication of when a change is needed in the presentation, whether that be in presentation length, property price, etc.
- i.  Detail Report: These provide a great deal of caller information arranged in an easy-to-read table. Pay close attention to the "call duration" column as that can be helpful in gauging the interest of the caller. Also check to see if the caller entered the additional 5th digit from a separate media sources, represented in the "Ad Track number" column. If you choose to share this report with homeowners you may consider removing the Caller ID information.

My Profile:

- A. Click the link that says "My Profile" (Agent address information optional.)
- B. Phone: view and change the phone number to which VoicePad will transfer all callers; set up a Spanish-speaking agent to receive Spanish-speaking callers; check to be sure text messaging is working and turn on/off; or set up after-hours call forwarding.
- C. Email: enter multiple email addresses for home or work; ensure that email inquiry notification is turned on; determine frequency of emailed inquiry report.
- D. Change Password: offers a pop-up box for you to change your password safely and securely on the same page.
- E. Re-record Name: Provides the opportunity to record name or change existing name recording at any time. This is a click-to-call application, so Eve will call the agent directly on the local phone number of their choice for name recording.
- F. How to Set Up Teams and Co-listings: New to VoicePad, the Team Manager option allows for the primary listing agent to enter her team so that calls, emails and texts can be directed to the correct team member, depending upon the listing. Simply click the "Edit" button next to the



**For assistance please contact VoicePad Customer Care:
(502) 515-7400 ext.1 or customer.care@voicepad.com**




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button next to the property you wish to assign to a new team member. If the team member has been entered previously select her name from the dropdown from the "New Contact" list. If the team member has not previously been entered in the Team Manager, fill out his information and assign him to the listings for which he is responsible.


How to Protect Buyers

- A. Click  to enter the Buyer Registration section from your VoicePad dashboard. Here you can register buyers to keep track of their activity and protect them from receiving calls from other realtors as they use your phone number to hear information about any house on the market.
- B. Benefits include:
 - a. Available local market listings are all searchable by street/house number
 - b. Allows your buyers to search "on their own" (saves on gas expense)
 - c. Eliminates other agents from getting leads on your buyer inquiries
 - d. Your buyers will automatically receive an e-mail on each searched property
 - e. The registering agent will automatically receive a summary email of the buyers' activity
- C. In the My Buyers section click  to create a new buyer's profile. Note that Name, primary phone number, and email address are required to create a new buyer profile.

How to Win Listing Presentations:

- A. Click  and choose the "Listing Tools" button.
- B. Choose "How to win a listing" for PDF instructions on how VoicePad can help you impress homeowners at listing presentations. Also includes a sample detail report.
- C. Choose "Listing collateral" to view a PDF hand-out you can leave with homeowners to help them further understand how VoicePad will help you sell their house. Or click "Email Listing Collateral" to email this PDF handout directly to homeowners from your VoicePad dashboard. You can even customize the message!

Print Advertising:

- A. Click  and select the "Track the Effectiveness of your Media Sources" button.
- B. When using VoicePad in any marketing remember that you can customize the code to track up to 11 separate media sources (including yard sign) all by simply altering the code used in the advertisement.
- C. Click the "Go to Media Tracking Administration Page" button to customize your media sources to your preferred marketing style. Every time you advertise in any media, market your code and the additional digit representing that specific media source. Keeping track of lead sources was never easier!



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Lead Suggestions:

- C. Be sure your text messaging options are set correctly and be sure you respond to all inquiries within 5 minutes. This ensures the caller remembers the property you're contacting them about and are still interested. The caller may still be in the neighborhood and will be impressed by your quick follow-up! An easy way to make a great impression!
- D. Using the email inquiries, call inquiry back the same day. Check the Lead Manager to determine interest level based on call duration and call frequency; note whether you reached the caller or not. Schedule and make follow-up calls then report feedback to the homeowner.

Callback Script Ideas:

- D. Use the Lead Manager to your advantage! Before calling back investigate:
 - a. how many times a caller has inquired about this or other properties
 - b. the caller's level of interest based on the duration of the call
 - c. if the caller chose to use the mortgage calculator at the end of the presentation
- E. Then try the following opening and questions, or invent your own!
 - a. *"Hi, my name is _____ with _____ and I'm following up on a call you made to one of my listings, _____."*
 - b. At this point you can mention information you gathered from the lead manager. For instance, if a caller has inquired several times on a listing you might say, *"I noticed you seem very interested in this property, when can we schedule a time for you to see it?"* or try the more general *"I wanted to touch base with you and find out if there's any more information I can provide for you."*
 - c. *"What questions can I answer for you about this property?"*
 - d. *"When are you available to schedule a showing?"*
 - e. *"Have you been pre-qualified yet for a mortgage?"*
- F. If caller does not seem interested in this property, find out why. Any feedback can be presented to the homeowner and you may still be able to get the sale by helping the caller find a house that better fits his/her needs.

Training

- You can access an interactive tutorial by visiting <http://www.voicepad.com/flashtraining/trainer.htm>
- Excalibur will periodically organize webinar and live training sessions. Notices of these events will be sent out via e-mail.

Agent Training Archives can be found at <http://info.voicepad.com/training-archive>

Live Webinars Are Available at:

- **VoicePad 101: Getting Started / Listings & Leads**

- <http://info.voicepad.com/voicepad-101/>

- **VoicePad 201: Serve and Protect your Clients / Register Your Customers for Private Access to MLS Inventory**

- <http://info.voicepad.com/voicepad-201/>

- **VoicePad 301: Marketing Ideas**

- <http://info.voicepad.com/voicepad-301/>