LONE WOLF

WOLFconnect

TECHNICAL MANUAL

LONE WOLF
REAL ESTATE TECHNOLOGIES

231 Shearson Cresent, Suite 310,
Cambridge, Ontario, Canada , N1T 1J5
T: 1.866.CRY.WOLF (279.9653)
F: 1.519.624.8950
www.lwolf.com
sales@lwolf.com

Dear Valued Customer,

Before WOLFconnect was born, agents entered their office through a door that required a physical key.

Almost a decade later the key is software and the physical office has been replaced by WOLFconnect.

The modern real-estate agent is constantly on the move and receives a lot of their information electronically; like leads, bulletins and listings. WOLFconnect is the perfect solution for organizing and tracking these items for the tech-savvy agent while keeping them connected to your office environment. Connected means they can submit deals, pick up forms, send messages, share information with other agents and perform all of the tasks that they would do as if they were physically in the office.

After being in this industry for more than 25 years, I had a vision of how easy things should be for the people running the show and WOLFconnect is the result of that.

Lone Wolf will continue creating the tools designed to keep you competitive but it's up to you to use them.

Wishing you all the best,

Des O'Kelly
President
Lone Wolf Real Estate Technologies

Access to information and features described within this document is dependent on user permission level within WOLFconnect.

See the Granting Access and User Roles section for more information on user permissions.

LONE WOLF
REAL ESTATE TECHNOLOGIES

231 Shearson Cresent, Suite 310,
Cambridge, Ontario, Canada , N1T 1J5
T: 1.866.CRY.WOLF (279.9653)
F: 1.519.624.8950
www.lwolf.com
sales@lwolf.com

Table of Contents

Table of Contents

Table of Contents

Lone Wolf Real Estate Technologies

T: 1.866.CRY.WOLF(279.9653) • F: 1.519.624.8950 • www.lwolf.com • support@lwolf.com

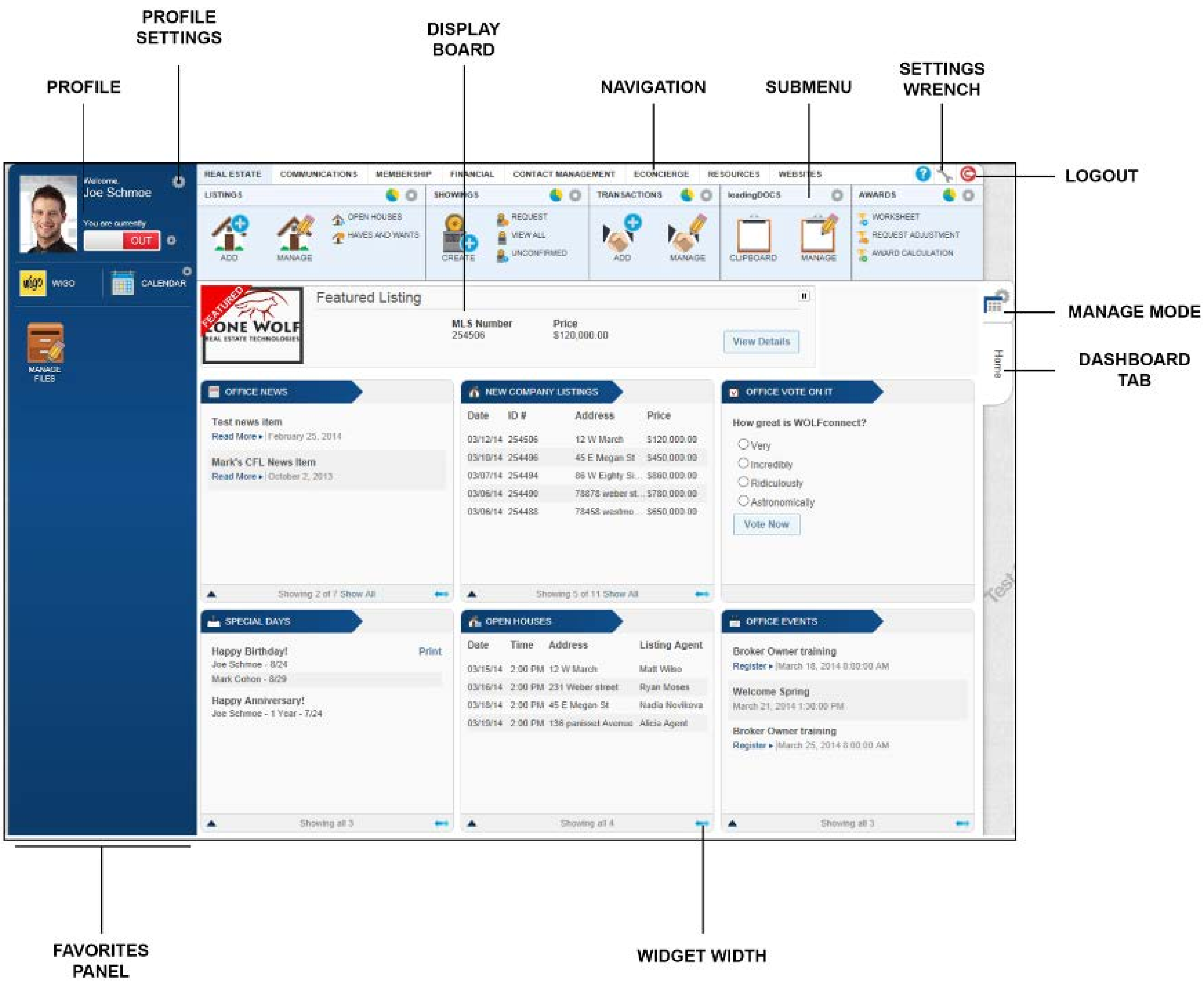
Table of Contents

Websites

REAL ESTATE | COMMUNICATIONS | MEMBERSHIP

OVERVIEW

Default Dashboard



Dashboard Overview

Navigation Menu and Submenus

The Navigation menu is used to navigate WOLFconnect.

Click on menu options to display the submenu options. Click again on the menu option to collapse and expand the Navigation menu.

Manage Mode

Manage Mode is used to manage Tabs, Widgets and Favorites. Click the Manage Mode button to enter Manage Mode.

Dashboard Tabs

Dashboard Tabs are used to navigate between Dashboards. Click a Dashboard Tab from wherever you are within WOLFconnect to instantly view the desired Dashboard.

Double-click a Tab to enter a name for the Tab.

Enter Manage Mode and click the + button below the Tabs to create a new Tab. Delete a Tab by clicking the **Delete** icon .

Profile

Your Profile is your representation within WOLFconnect.

A Profile picture, personal and professional details, team information, transaction information and more can be accessed by clicking the **Settings** icon to the right of your Profile photo.

Tip Profile functions are covered in more detail in the Adding and Managing Agents and Staff section.

Favorites Panel

Your most-used WOLFconnect functions can be stored in the Favorites Panel.

Simply drag and drop the icon from the Navigation menu to the Favorites Panel. Enter Manage Mode to remove an icon from the Favorites Panel by clicking the **Remove** icon .

Widgets

The Widget is a great feature that is available to every level of user in WOLFconnect for communicating and organizing information. Simply drag, drop and click your way to a customized Dashboard.

Tip Widgets are covered in more detail in the Widgets section.

Display Board

The Display Board automatically displays information such as Office News, Special Days, Events and Open Houses. Custom content for the Display Board can be created as well.

Click the Manage Display Board option in the Wrench settings menu to edit your Display Board content.

Tip The Display Board is covered in more detail in the Display Board section.

Calendar and WIGO

The Calendar allows the creation of personalized calendars and sharing of calendar information between users.

WIGO is a To Do List feature within WOLFconnect. Integration between WIGO and the Calendar ensure that no event or task goes by unnoticed.

Tip The Calendar and WIGO are covered in more detail in the Calendar and WIGO section.

In/Out Indicator

The In/Out Indicator is a constant companion within WOLFconnect. Using the In/Out function consistently will allow your colleagues to know your status at all times.

OVERVIEW

REAL ESTATE | COMMUNICATIONS | MEMBERSHIP

Logging In

WOLFconnect Login Screen

The WOLFconnect Login Page will greet you upon arrival at the WOLFconnect site.

1. Enter your user ID in the **User ID** text field. This is required for login as indicated by the red asterisk *.
2. Enter your password in the **Password** text field.
3. Select whether WOLFconnect should remember your username by using the **Remember Me** checkbox ☑.
4. Click the **Login** button.

Agentwolf.com

Agents can log in to their Office WOLFconnect site without having to memorize a lengthy website address.

1. Using your internet browser, navigate to **www.agentwolf.com**.
2. Click the **Login Now** button.
3. Enter your WOLFconnect **Username**.
4. Enter your WOLFconnect **Password**.
5. Click the **Login** button or press the **Enter** key on your keyboard.

This will bring you to your Office WOLFconnect login site.

Lost Password

If your password has been lost or forgotten use the Lost Your Password function to be issued a temporary password for logging in to WOLFconnect.

1. Click **Lost Your Password?**
2. Enter your username in the **Username** text field.

Tip If you do not know your Username contact your Administrator.

3. Enter your email address in the **Email Address** text field.
4. Click the **Reset Password** button. You will receive an email at the email address you entered asking you to visit a link within WOLFconnect.
5. Enter a new password in the **New Password** text field.
6. Enter the same password in the **Confirm Password** text field.
7. Click the **Submit** button.

Your new password will immediately give you access to WOLFconnect.

Reset Password

1. Click **Reset Your Password?**
2. Enter your username in the **Username** text field.
3. Enter your current password in the **Password** text field.
4. Enter a new password in the **New Password** text field.
5. Enter the same password in the **Confirm Password** text field.
6. Click the **Submit** button.

Your new password will immediately give you access to WOLFconnect.

Welcome Email

Upon Profile creation, Users are sent a Welcome Email containing their User ID and instructions on how to create their first WOLFconnect Password.

1. Open the email from lwolf.com.
2. Click the link contained in the email. This will bring you to the WOLFconnect Login Page.
3. Enter a new password in the **New Password** text field.
4. Enter the same password in the **Confirm Password** text field.
5. Click the **Save** button.

The following criteria must be met in order for a User to receive a Welcome Email:

- A Welcome Email has not been sent previously
- The User Profile is Active
- The User Profile has been Approved
- The User has an assigned Role
- The User has a Username

Tip Typically a Welcome Email is triggered upon saving a User Profile or when assigning a User Role.

Welcome Window

The Welcome Window appears on every login to WOLFconnect. It allows you to:

- Set your In/Out Status so you can consistently let your colleagues know when you are available
- View your contact information to confirm its accuracy
- Enter notes to remind yourself of important information or enter more detailed notes

WOLFconnect Welcome Window

Logging Out

To log out of WOLFconnect, simply click the Logout icon in the top right corner of the screen.

Compatibility Mode for Internet Explorer Users

If you are encountering challenges displaying certain windows within WOLFconnect and are using Internet Explorer, Compatibility Mode may be the solution.

1. Navigate to the WOLFconnect Login Page.
2. In Internet Explorer, press the **ALT** key on your keyboard.
3. In the Menu Bar, click **Tools**.
4. Click **Compatibility View Settings**.
5. The domain for the currently displayed site will appear in the Add This Website text field (eg. globalwolfweb.com). Click the **Add** button.
6. If the **Display All Websites in Compatibility View** checkbox ☑ is selected, deselect it.
7. Click the **Close** button.

OVERVIEW

REAL ESTATE | COMMUNICATIONS | MEMBERSHIP

LONE WOLF WOLFconnect

General Settings

General Settings must be configured for WOLFconnect to be used to its full potential.

Company Profile

1. In the Navigation menu, mouse-over the **Wrench Settings** icon. Click **Company Profile**.

General

The General tab contains basic company information such as address, contact and MLS Board information.

1. Click the **General** tab.

Company Details

2. Enter the company **Web Address** in the text field.
3. Enter the physical address of the Home Office.

Other Options

4. Select the Agent Title for private and public sites from the **Call Agent This** drop-down menus.
5. Enter the **Default Agent Sales Title** in the text field.
6. If desired, enter an **Override Office Name** in the text field.
7. Select whether the Agent Sales Title will appear after Agent names from the **Force Sales Title After Agent Name** drop-down menu.
8. Click the **Set Business Hours** button.
9. Select the Business Hours. **Green** = Open. **Red** = Closed.

Tip To block off entire days, click the name of the day at the top of the grid. To block off entire periods of time for the week, click the time on the left of the grid.

10. Click the **Save** button to save your changes or Cancel.

Security

11. If desired, enter the number of days before password expiry in the **Password Expiration Days** text field.
12. If desired, enter the number of hours before user session expiration in the **User Session Expiration (hrs)** text field.

Tip An entry of 0 will result in no expiration.

MLS Boards

The MLS Boards section displays MLS Boards synchronized with WOLFconnect.

License

13. If the MLS Board provides a Listing Feed from multiple states/provinces but only allows display of Listings from licensed states/provinces, select the states/provinces in which the Office is licensed.

Tip Hold the **CTRL** key to select multiple states/provinces.

Contact Information

14. Enter the Contact Information in the text fields.

Company Photo

15. Click the **Change Photo** button.
16. Click the **Browse** button, select an image and click **Open**.
17. Resize the image by clicking and dragging the image frame, using the Image Preview as a guide.
18. Click the **Save** button to save your changes or Cancel.

WOLFconnect Appearance

1. Click the **WOLFconnect Appearance** tab.

Tip Settings configured in the WOLFconnect Appearance tab will only apply to WOLFconnect windows run outside of WOLFtracks.

2. Select the **Background** and **Font** colors.
3. Select the **Theme** from the drop-down menu.
4. Click the **Save** button to save your changes or Cancel.

Modules

1. Click the **Modules** tab.
2. Activate/deactivate WOLFconnect modules using the **ON** and **OFF** radio buttons.
3. Click the **Save** button to save your changes or Cancel.

Integrations

1. Click the **Integrations** tab.
2. Activate/deactivate Integration Partners using the **ON** and **OFF** radio buttons.
3. Click the **Save** button to save your changes or Cancel.

Social Media

1. Click the **Social Media** tab.
2. Select if the Social Media Product is **Active** using the drop-down menu.
3. Enter the **URL** for the Social Media Account.
4. Click the **Save** button to save your changes or Cancel.

System User Access

Tip See the Granting Access and User Roles section for more detail.

Display Options

1. In the Navigation menu, mouse-over the **Wrench Settings** icon. Click **Display Options**.
2. Select **Color** or **Monochromatic** icons using the radio buttons.

Internal Display Board

This will open the Display Board which will showcase internal Listings, News, Events and more.

1. In the Navigation menu, mouse-over the **Wrench Settings** icon. Click **Internal Display Board**.

Manage Display Board

Tip See the Display Board section for more detail.

Reports

1. In the Navigation menu, mouse-over the **Wrench Settings** icon. Click **Reports**.

Admin Summary Report

This report displays a summary of administrative information.

Agent Count Logs Reports

This report displays the Agent count for the selected date range.

Company Roster Report

This displays a company roster sortable by Office, Birthday Month and searchable by Name.

Front Desk Activity Report

This report displays created Showings, Showing activity and Messages for the selected users.

User Activity Report

This report displays user activity for the selected users.

User Extension Report

This report displays extension information for the selected Offices.

User Integration Report

This report displays the integration information for each User Role for the selected Offices.

User Messaging Report

This report displays user notification settings.

OVERVIEW

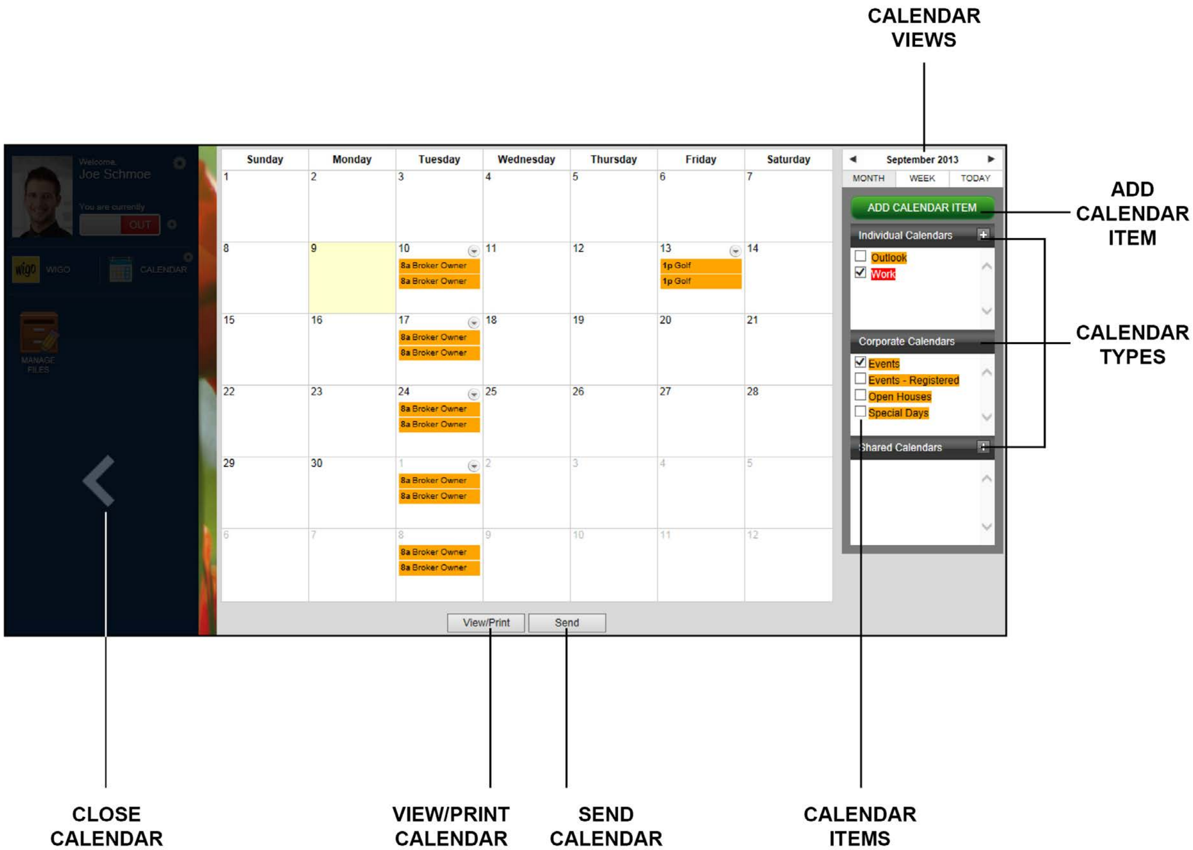
REAL ESTATE | COMMUNICATIONS | MEMBERSHIP

LONE WOLF WOLFconnect

The Calendar and WIGO function together within WOLFconnect to track events and TO DO List items.

Accessing the Calendar

1. Access the Calendar by clicking the **Calendar** button below the Profile.
2. The Calendar will slide across the screen displaying the current month. Click outside of the Calendar at any time or click the arrow on the left side of the screen to close the Calendar.



Calendar Window

Tip By default the Corporate Calendar will be displayed. Only users of Administration level permission or higher can add calendar items to the Corporate Calendar.

Individual and Corporate Calendars

Individual Calendars are calendar items only accessible by the user creating them. An Individual Calendar will need to be created before being able to add calendar items.

1. To create an individual calendar, click the ⊞ icon beside Individual Calendars.
2. Enter a name for the calendar in the **Name** text field.
3. Select a colour for the new calendar to differentiate its items from the Corporate Calendar and other individual calendars which may be created.
4. Select whether the calendar will be **Private** or **Shared**.
   a. If Shared is selected, select which users will be able to view the calendar.
5. Click the **Save** button to save your changes or Cancel.

Tip The process to add a Corporate Calendar is the same as Individual Calendars but is dependent on user permission level. Corporate Calendar items are viewable by all users.

Adding Calendar Items

1. Click the **Add Calendar Item** button.
2. Enter a name for the calendar item in the **Title** text field.
3. If desired, enter a description of the calendar item in the **Description** text field.
4. Select whether the calendar item is an **All Day** event using the checkbox ☑.
5. Select the date and time for the calendar item by typing into the **From** and **To** text fields or using the calendar control.
6. Select the **Individual Calendar** to which the calendar item will belong.
7. Select whether the calendar item will be **Private** or **Shared**.
8. Click the **Save** button to save your changes or Cancel.

Editing Calendar Items

Editing calendar items is dependent on user permission level and if you are the owner of the calendar item.

1. Click the calendar item you wish to edit.
2. Makes the desired changes using the same controls as Adding Calendar Items.
3. Click the **Save** button to save your changes, Cancel or delete the calendar item by clicking the Delete button.

Moving Calendar Items

1. To move a calendar item to a different day, click and drag the item from the existing date to the desired new date.
2. Click the **OK** button to confirm your changes or Cancel.

Tip To use the click and drag functionality, the calendar item must have been created by the user and set to Private.

or

3. Click the calendar item and change the date and time by typing into the **From** and **To** text fields or using the calendar control.
4. Click the **Save** button to save your changes or Cancel.

Calendar Display

Calendar Selection

To select Individual, Corporate and Shared Calendars and individual calendar item types to display in the Calendar window, select each by using the checkboxes ☑ beside each option.

If you have integrated Microsoft Outlook or Google Calendars they will display here as well. See the Calendar Integration section for more detail.

Calendar Item Details

To view details of a calendar item, mouse-over or click the item itself.

All days with a scheduled item display an icon. Click this icon to view all items scheduled for that day in a newsletter format.

View/Print Calendar

The WOLFconnect Calendar function can be viewed or printed in .PDF format.

1. Click the **View/Print** button. This will display the separate calendars by month sorted by Special Days, Events, WIGO tasks, etc.

Send Calendar

Calendars can also be sent to other WOLFconnect users, business contacts or client contacts.

1. Click the **Send** button.
2. Select whether to send to **Agent/Staff**, **Business Contacts** or **Client Contacts** using the radio button.
3. Select specific users to receive the calendar using the **Selection List**. Type into the text field or select a user and click the **Add** button to add them to the **Recipient List**.

Tip Hold the **CTRL** key to select multiple users.

4. Enter a subject for the message containing the calendar attachment by typing in the **Subject** text field.
5. Select the importance of the message by using the **Importance** drop-down menu.
6. Select whether to use HTML formatting for the message. This will reveal more formatting options.
7. If desired, type additional text to include with the calendar attachment in the provided text field.
8. Click the **Send** button.

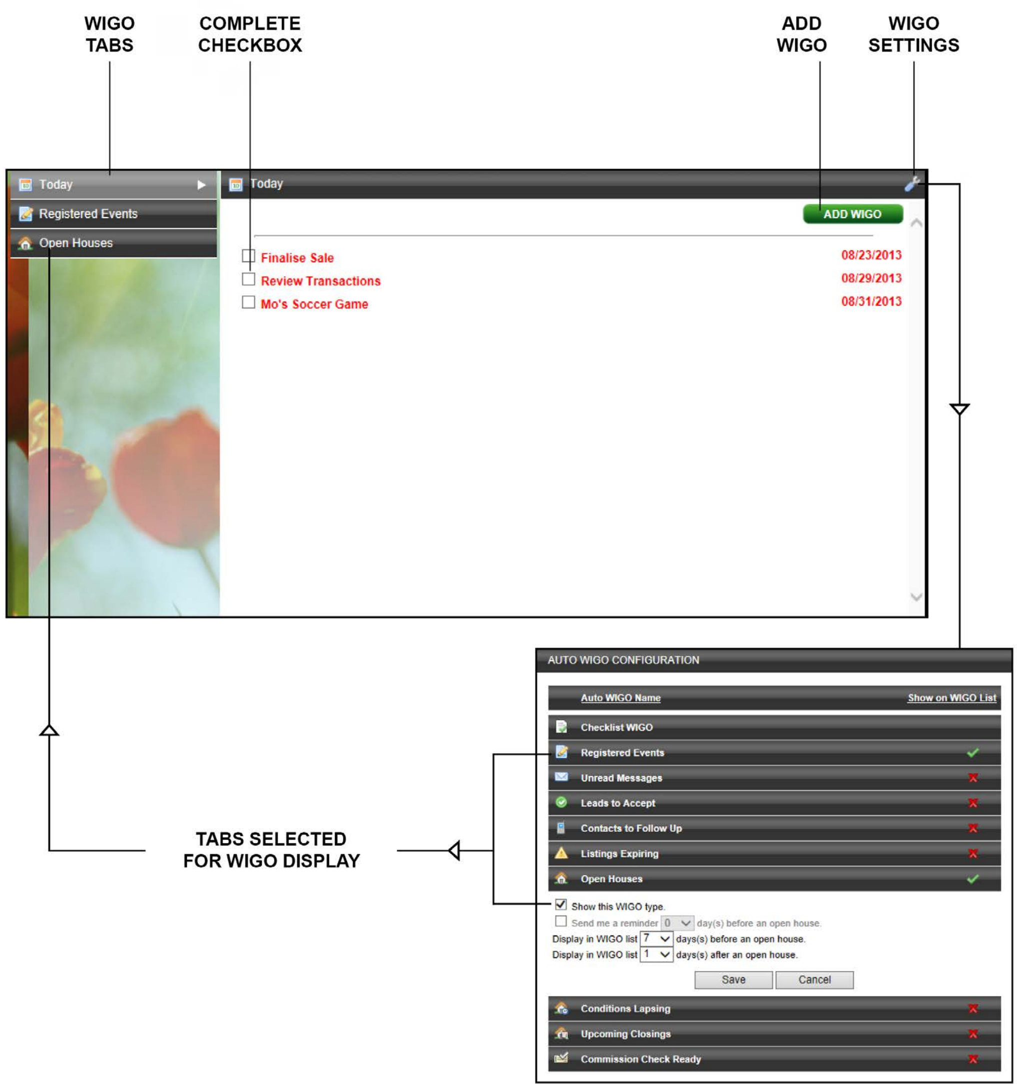
WIGO (What Is Going On?)

WIGO allows you to create and maintain a TO DO List which is integrated with the Calendar. WIGO is a user-specific function. Each user is responsible for set up and management of WIGO to use it to its full capability.

Accessing WIGO

1. Access WIGO by clicking the **WIGO** button below the Profile.
2. WIGO will slide across the screen. Click outside WIGO at any time or click the arrow on the left side of the screen to close WIGO.

Tip WIGO displays tasks in chronological order. This display order cannot be changed.



WIGO Window and Settings

Adding a WIGO

1. Click the **ADD WIGO** button.
2. Enter a title for the WIGO in the **Title** text field.
3. Enter a description for the WIGO in the **Description** text field.
4. Select a due date for the WIGO by typing in the **Due Date** text field or using the calendar control.
5. Select if the WIGO task is complete by checking/unchecking the **Complete** checkbox ☑.
6. Click the **Save** button to save your changes or Cancel.

WIGO Settings

1. Click the WIGO **Settings** icon to display WIGO Settings:

Checklist WIGO

1. Select whether WIGO should send reminders to you for approaching tasks and events by using the checkbox ☑.
2. Select the numbers of days in advance WIGO should remind you by using the drop-down menu.
3. Click the **Save** button to save your changes or Cancel.

Remaining Settings

Settings can be customized for the following items:

- Registered Events
- Unread Messages
- Leads to Accept
- Contacts to Follow Up
- Listings Expiring
- Open Houses
- Conditions Lapsing
- Upcoming Closings
- Commission Check Ready

1. Select if WIGO should display the specific item by using the **Show this WIGO** type checkbox ☑.
2. Select whether WIGO should send reminders to you for the specific item by using the checkbox.
3. Select the numbers of days in advance WIGO should remind you by using the drop-down menu.
4. Select the number of days in advance WIGO should display the item.
5. Select the numbers of days past the item WIGO should display the item.
6. Click the **Save** button to save your changes or Cancel.

Tip Some display settings are specific to each WIGO display item. For example, reminder settings are available for Registered Events but are unavailable for Leads to Accept.

Calendar Integration

The WOLFconnect Calendar has the capability to integrate with Microsoft Outlook and Google Calendars ensuring that all of your calendars contain up-to-date information.

Calendar Integration Set-Up

1. Above the Calendar button below your Profile, click the **Calendar Settings** icon .

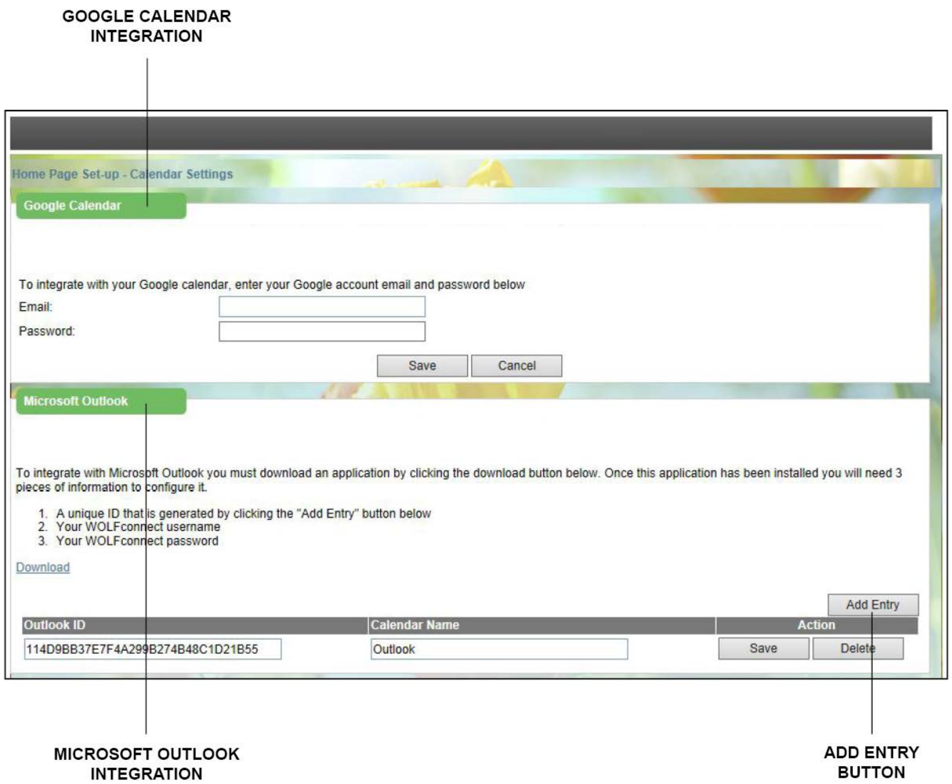
Microsoft Outlook

In order to integrate with Microsoft Outlook, you will need to download and install the Lone Wolf Calendar Sync Application.

1. To download the Lone Wolf Calendar Sync Application, click **Download**.
2. Follow the prompts for your particular browser and run the application.

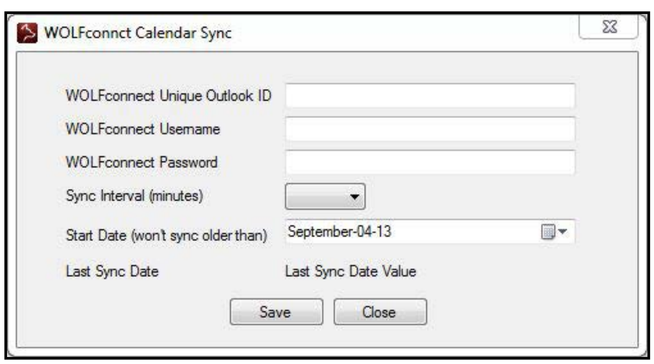
WOLFconnect Calendar Sync Installation

3. Click the **Next** button.
4. Select the folder to install to on your computer by clicking the **Browse** button.
5. Select whether to install for yourself or everyone using the computer by using the radio buttons.
6. Click the **Next** button.
7. Once installation is complete, click the **Close** button.



Calendar Integration

8. In the WOLFconnect Calendar Integration window, click the **Add Entry** button.
9. Copy the information in the **Outlook ID** text field.
10. Navigate to the installation folder selected in Step 4 and double-click the file named “LWCalSync”.



WOLFconnect Calendar Sync

11. Paste the information from the Outlook ID text field into the **WOLFconnect Unique Outlook ID** text field.
12. Enter your WOLFconnect **Username** and **Password**.
13. Select a **Sync Interval** from the drop-down menu.
14. Select a **Start Date** by using the calendar control.
15. Click the **Save** button to save your changes or Close.

Lone Wolf Calendar Sync

The Lone Wolf Calendar Sync application will now appear in your system tray and will open automatically upon Windows start-up.

Right-clicking the Lone Wolf Calendar Sync system tray icon will display the following options:

Sync Now – This will synchronize the Microsoft Outlook and WOLFconnect Calendars based on your preferences selected during installation
Configure – This allows you to change the preferences selected during installation
Exit – Closes the Lone Wolf Calendar Sync application

OVERVIEW

REAL ESTATE | COMMUNICATIONS | MEMBERSHIP

LONE WOLF WOLFconnect

Activating the WOLFconnect Widgets

The Widget is a great feature that is available to every level of user in WOLFconnect for communicating and organizing information. Simply drag, drop and click your way to a customized WOLFconnect experience.

1. Click the **Manage Mode** button. The currently displayed page will enter Manage Mode.
2. Click the **Add Widget** button at the bottom of the screen.
3. Add Widgets to the currently displayed page:
    a. Select the desired Widget and click the **Add Selected** button.

    or

    b. Click and drag the desired Widget to the **Drag New Widgets Here** frame.
4. When done, click the **Close** button. The currently displayed page will remain in Manage Mode.
5. Finalize your changes by clicking the **Manage Mode** button.

Deleting Widgets

1. Click the **Manage Mode** button. The currently displayed page will enter Manage Mode.
2. Click the **Delete** icon for the desired Widget.
3. A prompt will appear confirming deletion. Click the **Yes** button to confirm deletion or No.

Customizing the WOLFconnect Widgets

Each Widget can be named, re-sized and customized to display a specific number of entries.

1. To customize a Widget, click the **Manage Mode** button. The currently displayed page will enter Manage Mode.
2. Customize the size of the Widget (if available) by clicking the **Resize** icon and selecting Single-, Double- or Triple-size.
3. Click the **Settings** icon on the desired Widget.

News

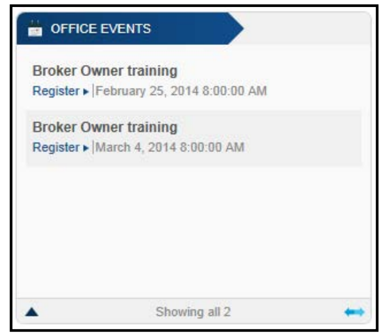
1. Re-name the Widget using the **Title** text field.
2. Customize the number of displayed **News** items by clicking up or down on the SpinEdit control or entering a number manually up to a maximum of 100.
3. Click the **Save** button to save your changes or Cancel.

Tip Manage the content of the News Widget by clicking **Communications** in the Navigation Menu. In the News submenu, click **Add** or **Manage**.

Events

1. Re-name the Widget using the **Title** text field.
2. Customize the number of displayed **Events** by clicking up or down on the SpinEdit control or entering a number manually up to a maximum of 100.
3. Click the **Save** button to save your changes or Cancel.

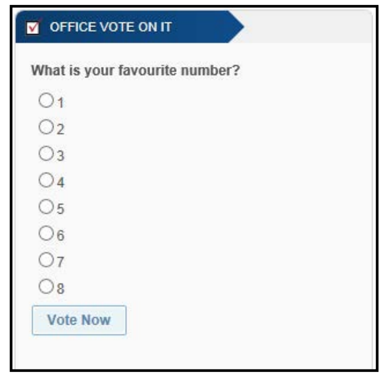
Tip Manage the content of the Events Widget by clicking **Communications** in the Navigation Menu. In the Events submenu, click **Add** or **Manage**.



Vote On It

1. Re-name the Widget using the **Title** text field.
2. Click the **Save** button to save your changes or Cancel.

Tip Manage the content of the Vote On It Widget by clicking **Communications** in the Navigation Menu. In the Vote On It submenu, click **Add** or **Manage**.



Links

1. Re-name the Widget using the **Title** text field.
2. Customize the number of displayed **Links** by clicking up or down on the SpinEdit control or entering a number manually up to a maximum of 100.
3. Select the **Type** of Links displayed from the drop-down menu. This dictates the user group from which the Links Widget will populate.
4. Select the **Category** of Links displayed from the drop-down menu. This dictates which Links category within the user group will display.
5. Click the **Save** button to save your changes or Cancel.

Tip Manage the content of the Links Widget by clicking **Communications** in the Navigation Menu. In the Links submenu, click the specific link group or the **Settings** button.

Special Days

1. Re-name the Widget using the **Title** text field.
2. Customize the number of displayed **Special Days** by clicking up or down on the SpinEdit control or entering a number manually up to a maximum of 50.
3. Select the **Months to Show** to choose from the drop-down menu how far in advance Special Days will display.
4. Click the **Save** button to save your changes or Cancel.

Tip Manage the content of the Special Days Widget by clicking the **Calendar** button below your Profile.

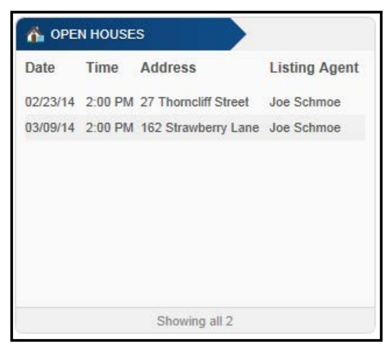
New Company Listings

1. Re-name the Widget using the **Title** text field.
2. Select the type of **Listings to Show** from the drop-down menu. This dictates which category of New Listings the Widget will display.
3. Select the **Listing Source** from the drop-down menu. This dictates if the New Listings Widget will display MLS Board or Exclusive listings.
4. Customize the number of displayed **Company Listings** by clicking up or down on the SpinEdit control or entering a number manually up to a maximum of 100.
5. Click the **Save** button to save your changes or Cancel.

Tip Manage the content of the New Company Listings Widget by clicking **Real Estate** in the Navigation Menu. In the Listings submenu, click **Add** or **Manage**.

Open Houses

1. Re-name the Widget using the **Title** text field.
2. Customize the number of displayed **Open Houses** by clicking up or down on the SpinEdit control or entering a number manually up to a maximum of 100.
3. Click the **Save** button to save your changes or Cancel.



Tip Manage the content of the Open Houses Widget by clicking **Real Estate** in the Navigation Menu. In the Listings submenu, click the **Open Houses** button.

Unconfirmed Showings

1. Re-name the Widget using the **Title** text field.
2. Customize the number of displayed **Unconfirmed Showings** by clicking up or down on the SpinEdit control or entering a number manually up to a maximum of 100.
3. Click the **Save** button to save your changes or Cancel.

Tip Manage the content of the Unconfirmed Showings Widget by clicking **Real Estate** in the Navigation Menu. In the Showings submenu, click the **Unconfirmed** button.

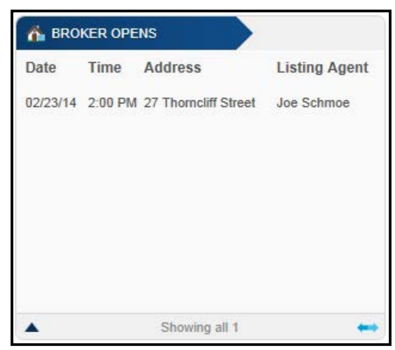
Deals Closing

1. Re-name the Widget using the **Title** text field.
2. Select the **Display Month** using the drop-down menu.
3. Customize the number of displayed **Deals Closing** by clicking up or down on the SpinEdit control or entering a number manually up to a maximum of 100.
4. Click the **Save** button to save your changes or Cancel.

Tip Manage the content of the Deals Closing Widget by clicking **Real Estate** in the Navigation Menu. In the Transactions submenu, click the **Manage** button.

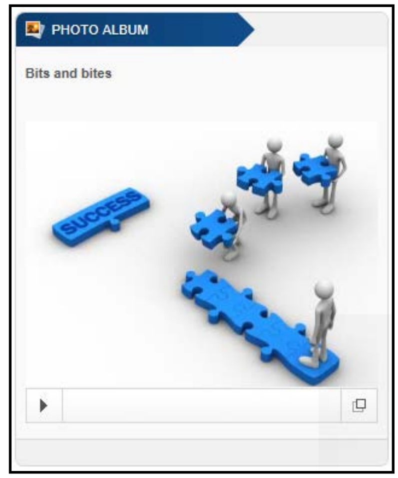
Broker Opens

1. Re-name the Widget using the **Title** text field.
2. Select which **Broker Opens** to display using the drop-down menu.
3. Customize the number of displayed **Open Houses** by clicking up or down on the SpinEdit control or entering a number manually up to a maximum of 100.
4. Click the **Save** button to save your changes or Cancel.



Tip Manage the content of the Broker Opens Widget by clicking Real Estate in the Navigation Menu. In the Listings submenu, click **Open Houses**.

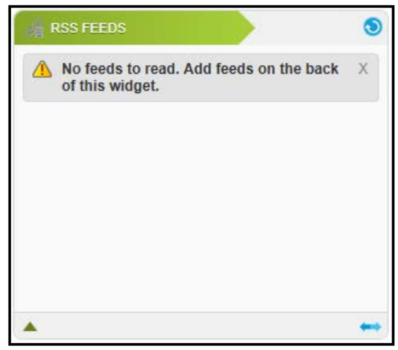
Photo Album



1. Re-name the Widget using the **Title** text field.
2. Customize the delay time between photos in seconds using the **Photo Delay** drop-down menu.
3. Click the **Save** button to save your changes or Cancel.

Tip Manage the content of the Photo Album Widget by clicking Communications in the Navigation menu. In the Photo Album submenu, click **Gallery**.

RSS Feed



1. Re-name the Widget using the **Title** text field.
2. If desired, name the individual RSS Feed using the **Feed Title** text field.
3. Enter the **Feed** or **Website URL** for the RSS Feed.
4. Activate an RSS Feed by clicking the **Activate** icon ✔. Deactivate an RSS Feed by clicking the **Deactivate** icon .
5. Click the **Add Feed** button to add additional RSS Feeds.
6. Click the **Save** button to save your changes or Cancel.

Tip Refresh the content of the RSS Feed Widget by clicking the **Refresh** icon .

OVERVIEW

REAL ESTATE | COMMUNICATIONS | MEMBERSHIP

Manage Display Board

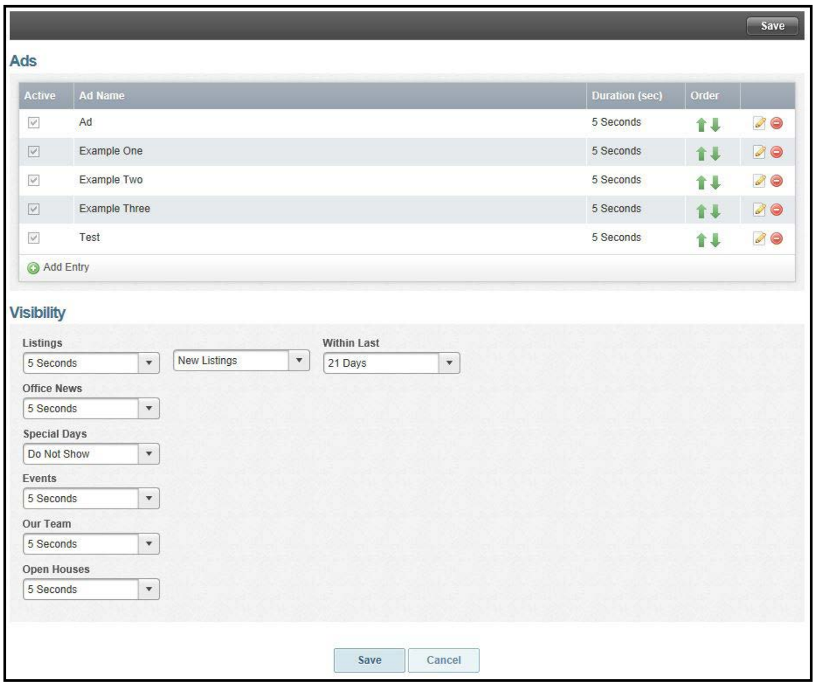
The Display Board automatically displays information such as Listings, Special Days, Events and Open Houses.

To customize Display Board content:

1. Mouse-over the **Wrench Settings** icon in the top right of the screen. Click **Manage Display Board**. This will display the System User Access page. All existing User Roles will be displayed here.
2. Click the **Edit** button.

Custom Display Board Content

Ad Creation



Display Board Window

Custom ad creation can be a great way to communicate information in circumstances which are not automatically displayed using the built-in functions of WOLFconnect.

To create new content for the Display Board:

1. Click the **Add Entry** button.
2. Enter a name for the custom content in the **Name** text field.
3. Select display duration from the **Duration** drop-down menu.
4. Select whether the content will be Active by checking the **Active** checkbox ☑
5. Select the format of the content by clicking **Banner** or **Custom HTML**.
   a. If selecting Banner, click **Upload Ad**, select the file you wish to use and click **Open**.

Tip To reduce the chance of low-quality Display Boards, the original image size should measure at least 1280x1020 pixels.

b. If selecting Custom HTML, you will have the option to enter custom HTML language into the **Custom HTML** Area. See the Appendix for examples of HTML language.

6. If applicable, enter a **URL** for the Display Board content to link to.

Tip “http://” must be entered before the URL for the link to work properly.

7. Set the order in which the content will display by using the **up** and **down** arrows.
8. Click the **Save** button to save your changes or Cancel.

Tip Custom content can be edited at any time by clicking the **Edit** icon .

Ad Deletion

1. Click the **Edit** button.
2. Delete the desired content by clicking the **Delete** icon .
3. When prompted, click **OK** to proceed with content deletion or Cancel.
4. Click the **Save** button to save your changes or Cancel.

Visibility

The Display Board can be configured to display information from other WOLFconnect modules including:

- Listings
- Office News
- Special Days
- Events
- Our Team
- Open Houses

1. Click the **Edit** button.
2. Select display duration from the first drop-down menu for each module.

Listings

The Listings Display Board setting has additional options.

3. Select which content will be displayed by selecting between New Listings and All Listings from the drop-down menu.
4. Select the date range which will display in the Listings Display Board up to 21 days.
5. Click the **Save** button to save your changes or Cancel.

REAL ESTATE

COMMUNICATIONS | MEMBERSHIP | FINANCIAL

LISTINGS
OPEN HOUSES
SHOWINGS
HAVES AND WANTS
loadingDOCS ADMINISTRATION
loadingDOCS DAY-TO-DAY
CONSUMER PORTAL
TRANSACTIONS

LONE WOLF WOLFconnect

Listings

The Listings module is a fundamental aspect of WOLFconnect. Listings and Open Houses are managed here with the capability to run reports.

Listings Window

MLS Board Listings

MLS Board Listings are imported into WOLFconnect daily. Once imported, WOLFconnect will display all MLS Board Listings, allowing you to view and manage the data.

Tip Timing of Listings synchronization is specific to each MLS Board.

Accessing Existing Listings

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click **Manage**.

Tip Access to view and edit Listings is dependent on user permission level. See the User Roles section for more detail.

Adding Pocket Listings

Pocket Listings are Listings that have not been registered with an MLS Board and are manually entered into WOLFconnect with the primary purpose of managing the list in advance of MLS Board synchronization.

Tip MLS Board Listings can take up to 24 hours to appear in WOLFconnect.

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click **Add**.
2. Populate the Listing Information, Address and other information thoroughly.

Tip Mandatory fields are indicated by a red asterisk *.

The Internal Listing # is not required and will integrate with brokerWOLF for brokerWOLF clients.

Directions and Remarks will be displayed on globalWOLF websites.

Future MLS Info

The Future MLS Info section ensures that the MLS Board Listing will overwrite the Pocket Listing once MLS Board synchronization is complete.

1. Select the MLS Board to which the Listing will be added in the future by using the **Future MLS Board** drop-down menu.
2. Enter the MLS # to be assigned to the Listing in the **Future MLS #** text field.
3. Click the **Save** button to save your changes or Cancel.

Map Information

Map Information will allow users to view the location of the Listing on globalWOLF websites.

1. Enter the address of the Listing in the **Lookup Address** text field.
2. Click the **Go** button.
3. If needed, right-click on the map to more accurately select the location.
4. Click the **Copy Coords** button.
5. Click the **Save** button to save your changes or Cancel.

People

Pocket Listings require the People tab to be populated as well.

Tip Agents adding Pocket Listings will automatically be designated as the Primary Agent.

1. Click the **People** tab.
2. Click the **Add/Change Agents** button.
3. Select the desired Agent from the Selection List and click the corresponding button to add a Primary, Secondary or Additional Agent to the Listing.
4. Click the **Save** button to save your changes or Cancel.

Editing Listings

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click **Manage**.
2. Click the desired Listing.
3. Edit details as desired using the tabs at the top to navigate the Listing information.
4. Click the **Save** button to save your changes or Cancel.

Listing Detail Tabs

List Tab

The List Tab contains basic information such as MLS #, Address, Price and Listing Agent.

Featured Column

Checkboxes in the Featured column allow globalWOLF clients to control where the Listing will be displayed: (O)ffice websites, (A)gent websites or both.

List Agent Column

The List Agent Column displays the Lead Agent assigned to each Listing.

Tip It is vitally important that a Listing Agent be assigned to each Listing. If an Agent is not assigned to a Listing it can affect lead distribution, Listing display on globalWOLF websites, showings and integration issues with brokerWOLF.

If the List Agent column displays “N/A”, the following issues could be the cause:

- The Listing Agent has missing or incorrect MLS ID information in their WOLFconnect profile (see Adding an Agent for more detail)
- The Listing itself is co-listed with another agency who has priority with the MLS Board (ensure that the Listing Agent’s MLS ID information is correct in their WOLFconnect profile)

Info Tab

The Info Tab contains more detailed information such as Price, Status, Address, MLS Info, Map Information, Directions and Comments.

Tip If the information for a Listing has been imported from an MLS Board this tab cannot be edited.

Future MLS Info

The Future MLS Info section ensures that the MLS Board Listing will overwrite the Listing once MLS Board synchronization is complete.

1. Select the MLS Board to which the Listing will be added in the future by using the **Future MLS Board** drop-down menu.
2. Enter the MLS # to be assigned to the Listing in the **Future MLS #** text field.
3. Click the **Save** button to save your change or Cancel.

or

1. Click the **Transfer To MLS#** button to merge the Pocket Listing with an MLS Board Listing already imported into WOLFconnect.
2. Enter the **MLS #** of the existing MLS Board Listing.
3. Click the **Save** button to save your changes or Cancel.

SEO (Search Engine Optimization) Manager

globalWOLF clients can edit the SEO Settings to maximize exposure to internet search engines like Google, Bing, Yahoo, etc.

Tip See the Search Engine Optimization section for more detail.

People Tab

The People Tab contains information for Agents, Sellers and Tenants associated with the specific Listing.

Adding Agents

1. Click the **Add/Change** button.
2. Select the desired Agent from the Selection List and click the corresponding button to add a Primary, Secondary or Additional Agent to the Listing.
3. Click the **Save** button to save your changes or Cancel.

Click the **Edit** icon to edit an Agent or the **Delete** icon to remove an Agent from a Listing.

Adding Sellers

For the initial entry, simply populate the Seller Information.

1. For additional entries, click the **Add Entry** button.

To delete a Seller click the **Delete** icon.

Adding Tenants

1. Click the **Add Entry** button.

To delete a Tenant click the **Delete** icon.

Details Tab

The Details Tab contains additional details that can be added to a Pocket Listing. Details here will appear on the Listing Details pages of Office and Agent websites.

Tip If the details for a Listing have been imported from an MLS Board this tab cannot be edited.

1. Enter desired information in the **Listing Information**, **Dimensions**, **School Information**, **Commercial Information**, **Rental** and **Features** sections.
2. Click the **Save** button to save your changes or Cancel.

Enhance Tab

Tip The Enhance Tab is available for editing to both MLS Board and Pocket Listings. See the Enhance Listings section for more detail.

The Enhance Tab is used for just that: enhancement. Here you can add photos, embed videos and add Virtual Tours to the Listing.

Tip Agents have access to Listing enhancement by default. Access to other users can be given using user permissions. See the User Roles section for more detail.

Feature Description

Customize the description of the Listing using the Feature Description text editor. Use HTML to format the text for maximum appeal.

Embed Video Code

Copy and paste embed code from a video provider like YouTube, Google Videos, etc. to add videos to the Listing.

Add/Update Photos

Add up to 100 photos to truly showcase your Listing.

Tip Using this feature will override any photos being uploaded from the MLS Board for the specific Listing.

Virtual Tours

Virtual tours can be embedded into the Listing as well. Use virtual tours you've created or if the MLS Board Listing features a virtual tour already, embed that tour using the Virtual Tour Link.

Showing Set-Up Tab

Tip The Showing Set-Up Tab will display information only if the Showings WOLFconnect module is enabled. See the Showings section for more detail.

Showing

This section allows activation/deactivation of Showings for the specific Listing. Entry of lockbox codes and showing instructions is available here.

1. Activate Showings for the Listing by selecting the **Allow Showings for this Listing** checkbox ☑.

Tip Deselecting this will prevent the Listing from being displayed in the Create Showing window. See the Showings section for more detail.

2. Enter **Lockbox** or **Key Codes** using the text fields.
3. Select the occupant using the **Occupied By** drop-down menu.

Tip Conditions will indicate any conditions entered in the brokerWOLF Transaction.

4. Enter **Showing Instructions** in the text field.
5. Enter **Instructions for the Showing Agent** in the text field.

Tip This information will be sent to the Showing Agent when they initially create a Showing.

6. Select the desired option for **Call Agent Before Showing** using the drop-down menu.
7. Select the desired option for **Call Occupant Before Showing** using the drop-down menu.
8. If desired, select the **Automatically Confirm New Showings** checkbox.
9. If desired, select the **Listing Agent to Confirm** checkbox and select the desired Listing Agents.

Tip Select this option if the Seller only wants to be contacted by the selected Listing Agents. If a specific Agent is not selected the Lead Agent will receive a notification when a Showing is created for the Listing.

10. Click the **Save** button to save your changes or Cancel.

Showing Availability Schedule

The Showing Availability Schedule ensures that any showings are scheduled according to the Listing Agent and seller/tenant's specifications.

1. Select **General Date & Time Exceptions**. **Green** = Available, **Red** = Not Available.

Tip To block off entire days, click the name of the day at the top of the grid. To block off entire periods of time for the week, click the time on the left of the grid.

2. Enter the amount of hours required for advance notice in the **Notification Required Before Showing** text field.
3. If desired, click the **Add Entry** button to block showing availability for specific dates and times.
   a. Click the **Save** icon to save your changes or Cancel.
4. Click the **Save** button to save your changes or Cancel.

Tip Edit Date & Time Exceptions by clicking the **Edit** icon . Delete them by clicking the **Delete** icon .

Seller/Tenant Showing Notifications

This feature enables showing notifications to be sent to Sellers/Tenants. An email address is required for notifications.

Tip Any seller/tenant information populated in the People tab will display here.

1. Enter the name of the Seller/Tenant in the **First Name** and **Last Name** text fields.
2. Enter an email address in the **Email Address** text field.
3. Select the types of notification (New, Confirmed, Cancelled, Feedback, Changed) to send using the checkboxes ☑.
4. Enter **Phone Information** for the Seller/Tenant.
5. For additional entries, click the **Add Entry** button.

Tip Edit Seller/Tenant Notifications by clicking the **Edit** icon . Delete them by clicking the **Delete** icon .

6. Click the **Save** button to save your changes or Cancel.

Showing Activity Tab

Tip The Showing Activity Tab will display information only if the Showings WOLFconnect module is enabled.

The Showing Activity Tab displays a record of showing activity for the specific Listing.

Clicking an individual entry will display details regarding each showing whether it is Active or Cancelled. See the Showings section for more detail.

View/Print

1. Select the report to display by selecting the **Agent View** or **Seller View** radio button.

   Agent View will display Showing Date/Time, Showing Agent Contact Information, Showing Status, Showing Type and Feedback.

   Seller View will display Showing Date/Time, Showing Status, Showing Type and Feedback.

2. Click the **View/Print** button to view the Showing Activity Tab as a PDF report which can be saved or printed.

Send Notification

This feature allows notifications to be sent to Agents who have previously shown the Listing.

1. Click the **Send Notification** button.
2. Click the **Price Reduction** or **Quick Message** button.

Tip By default the Recipient List will be populated by Agents that have previously shown the Listing.

3. Populate the message (see Messaging section for more detail).

Open Houses Tab

The Open Houses Tab displays all open houses specific to that Listing.

1. Click an open house entry to view details for that open house.

Tip View the Open Houses section for more detail.

Transferring Listing Details

In the event that a Listing expires and is re-listed with the same Agent, Listing Details can be copied to the new MLS #.

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click **Manage**.
2. Use the Filter Listings options to search for Inactive Listings.
3. Click the desired Listing.
4. Select Synch with MLS Data from the **Synch MLS Listing Data** drop-down menu.
5. Select Synch with MLS Photos from the **MLS Photo Synch** drop-down menu.
6. Click the **Transfer To MLS#** button.
7. Enter the **MLS #** of the re-listed Listing.
8. Click the **Transfer Now** button or Cancel.

Tip Be aware that this will overwrite all information stored in the Showing and Enhance tabs of the Listing. This function should only be used before booking Showings of the new Listing.

9. A prompt will appear confirming transfer. Click **OK** to confirm or Cancel.

Reports

Listing Reports can be used to ensure that there is never a shortage of information available to users.

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click the **Reports** icon.

Daily Activity Report

A report displaying New Listings, Price Changes, Sold Listings, Expired Listings and Showing Appointments for a specified date.

This report can display information for all Offices or specific Offices.

Expired Listing Report

A report displaying Expired Listings within a specified date range that can be filtered by Office or Agent.

Hot Sheet Report

A report displaying Listing Status Changes, Price Changes and New Listings for a specified date.

Listing Report

A report displaying Listings filtered by status for a specified date range.

Listing Administrator Report

A report displaying Listings that are not attached to an Agent in WOLFconnect and Agents with missing MLS IDs.

Tip See the Adding an Agent section for more detail.

Listing Information Report

A report displaying Listings that are missing key information such as Expiry Dates, Photos, Listing Remarks, Seller Information, Showing Instructions and Virtual Tours.

This report can display information by Office, Agent or Listing Status.

Sold Listing Report

A report displaying Listings with Sold status within a specified date range.

This report can display information by Office or Agent.

Target Market Analysis Report

A report displaying the percentage of Active and Pending Listings and Listings with Showings by price range within a specified date range.

Listings Settings

1. To access Listings Settings, click **Real Estate** in the Navigation menu. In the Listings submenu, mouse-over the **Settings** icon and click the desired setting.
2. Click the **Save** button to save your changes.

General Settings

Initially Show Listings – This setting controls if Listings will display by default when viewing the Manage Listings page. Setting this to No will require the user to use filters before Listings will be displayed.

Default Exclusive Listing Visibility – This setting controls if Pocket Listings will be visible on globalWOLF websites or only within WOLFconnect by default.

Show MLS Open Houses – This setting controls if WOLFconnect will display MLS Board-integrated open house information.

Track Open House Attendees – This setting controls if WOLFconnect will allow entry of the number of open house attendees to records for manually entered Open Houses.

Listing Search Filter Default – This setting controls the default filter option on the Manage Listings page.

Listing Admin

This setting allows users to be assigned as Listing Administrators.

Field Usage

This page allows selection of fields to use in the Listing Details Tab.

Red – This field will not appear in the Listing Details Tab.
Green – This field will appear in the Listing Details Tab.

Fields are sorted by Listing Information, Dimensions, School Information, Commercial, Rental and Features.

1. Click on each toggle to enable or disable that field.
2. Click the **Save** button to save your changes or Cancel.

Property Type List and Property Type Mapping

All Listings are organized by Property Type and Subtype. Property Types are used when performing Property Searches and when adding and managing Listings.

Tip Setting Property Types and Property Type Mapping is integral for proper use of WOLFconnect and globalWOLF and vitally important to companies listing with multiple MLS Boards.

The majority of MLS Boards use multiple descriptions to classify Listings. WOLFconnect has the capability to categorize MLS Board descriptions into Property Types relevant to your company using Property Type Mapping.

Notifications will be sent whenever your MLS Board adds a new Property Type to allow you to perform the required mapping. This notification will be sent to the designated Administrative Contact in the Company Profile. For assistance in mapping Property Types contact the Lone Wolf Support Team.

Adding Property Types

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, mouse-over the **Settings** icon and click **Property Type List**.
2. Click the **Add Type** button.
3. Enter a name for the property type in the **Property Type** text field.
4. Select if the property type will be the Default property type for imported MLS Board Listings by using the checkbox ☑.

Tip Selecting the Default checkbox will categorize all unrecognized property types imported from the MLS Board as that Property Type.

Not having a Default property type will result in new Property Types being created for all unrecognized property types imported from the MLS Board.

5. Select the **Property Class** using the drop-down menu.
6. Click the **Save** button to save your changes or Cancel.

Property Type Ordering

1. Click the **Order Types** or **Order Subtypes** button.
2. Order the types and subtypes by using the up and down arrows.
3. Click the **Close** button.

Tip The order selected here will be the order used in Property Type drop-down lists.

Adding Subtypes

1. Click the **Add Subtype** button.
2. Select the **Property Type** to which the subtype will belong using the drop-down menu.
3. Enter a name for the subtype in the **Property Subtype** text field.
4. Click the **Save** button to save your changes or Cancel.

Tip If an MLS Board does not use Subtypes WOLFconnect cannot automatically sort imported MLS Board Listings into Subtypes.

MLS Property Type Mapping

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, mouse-over the **Settings** icon and click **Property Type Mapping**.
2. Select the **MLS Board** to map using the drop-down menu.
3. For each MLS Board Property Type/Subtype, select the corresponding WOLFconnect **Property Type** and **Subtype** using the drop-down menus.
4. Click the **Save** button to save your changes or Cancel.
5. Repeat Steps 1-5 for each MLS Board.

Tip To delete a Property Type Map, click the **Delete** icon . Property Type Maps with associated Listings cannot be deleted.

brokerWOLF Property Type Mapping

Property Types must also be mapped in brokerWOLF to ensure accurate Listings synchronization with WOLFconnect.

Tip This section is only relevant to brokerWOLF clients.

1. In brokerWOLF, navigate to **I.3.3 – Property Types**.
2. Add the same Property Types as they exist in WOLFconnect.
3. Navigate to **E.1.1 – Company Profile**.
4. Click the **Interface** tab.
5. Select WOLFconnect from the **Integration Source** drop-down menu.
6. Click the **Configure** button.
7. Select **Property Types** from the drop-down menu in the top-left of the window.
8. Match brokerWOLF Property Types in the right-column with the WOLFconnect Property Types in the left-column using the drop-down menus.
9. Click the **Store** button to save your changes or Exit.

Enhance Listings

Both MLS and Pocket Listings can be enhanced with additional description, photos and virtual tours.

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click **Manage**.
2. Click the desired Listing.
3. Click the **Enhance** tab.

Feature Description

Tip Information entered here will override descriptions imported from the MLS Board.

1. Enter additional description in the **Feature Description** text field.
2. Format the description using the formatting options.
3. Select if the address will be displayed on globalWOLF websites using the **Show Address on Public Websites** checkbox ☑.

Tip Information entered here will assist in Search Engine Optimization.

Embed Video

1. Copy and paste embed text from a video hosting service into the text field.

Tip Limit video width to 480 pixels to ensure proper display.

2. Click the **Save** button to save your changes or Cancel.

Add/Update Photos

Add up to 100 photos to the Listing in WOLFconnect if you are limited in the amount of photos that can be uploaded to MLS Listings.

Tip Limit file size to less than 300 KB. Files larger than 300 KB will result in slower loading times for globalWOLF websites.

1. Click the **Add Photo** button.
2. Enter the **Position** in the text field (eg. 1, 2, 3, etc.). This will be the order in which the photos are displayed.
3. Click the **Browse** button. Select the photo and click the **Open** button.
4. Enter a **Title** for the photo in the text field.
5. Enter a **Description** for the photo in the text field.
6. Click the **Add Another Photo** button to add more photos or click the **Save All Photos** button.

Tip Change the order of photos using the **up** and **down** arrows. Edit photos by clicking the **Edit** icon . Delete photos by clicking the **Delete** icon .

Virtual Tours

Enter Virtual Tour information to attach a Virtual Tour to the Listing.

1. Enter a **Tour Label/Name** in the text field.
2. Enter the **Virtual Tour Link** in the text field.
3. Enter the **Virtual Tour Button URL** in the text field.

Tip This field can be left blank to display the default Virtual Tour Button.

4. Enter the **Virtual Tour Image URL** in the text field.

Tip The Virtual Tour Image will appear on the Virtual Tours System globalWOLF web page summarizing the virtual tours and will override the Position 1 display photo.

5. Enter the **Tour Description** in the text field.
6. Click the **Save** button to save your changes or Cancel.

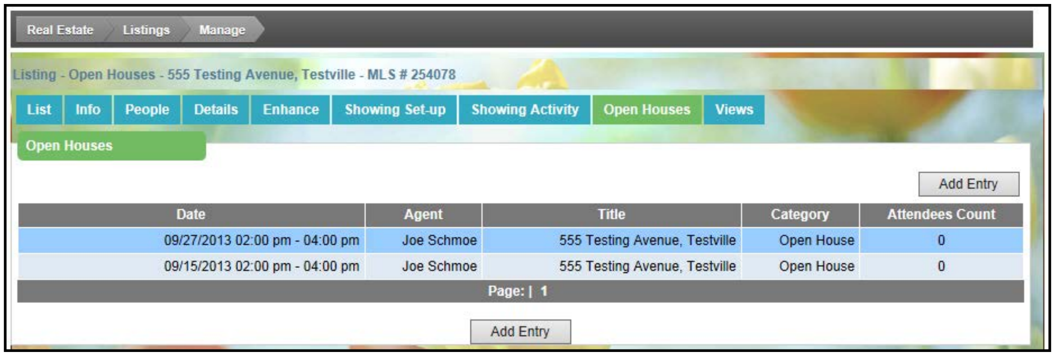
REAL ESTATE

COMMUNICATIONS | MEMBERSHIP | FINANCIAL

- LISTINGS
- **OPEN HOUSES**
- SHOWINGS
- HAVES AND WANTS
- loadingDOCS ADMINISTRATION
- loadingDOCS DAY-TO-DAY
- CONSUMER PORTAL
- TRANSACTIONS

Open Houses

Some MLS Boards include Open House information. The following is instruction on how to manually add Open Houses to Listings within WOLFconnect.



Open Houses Window

Add an Open House

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click **Manage**.
2. Click the desired **Listing**.
3. Click the **Open House** tab.
4. Click the **Add Entry** button.

Tip Open House Details default to the Public Open House category and is populated with information from the selected Listing.

5. Select an **Open House Category** using the drop-down menu.
6. Enter a title in the **Title** text field.
7. Enter a date for the Open House using the calendar control or typing in the text field.
8. Enter a time for the Open House using the drop-down menus.
9. Enter the expected number of attendees in the **Number of Attendees** text field.
10. Enter the host name in the **Host Open House** text field.
11. Select **Web Visibility** option(s) and click the **Add** button to display the Open House on the chosen website(s). Remove Web Visibility options by using the **Remove** button.

Tip Web Visibility is only available to clients who request the option.

12. Enter a description for the Listing or Open House in the **Description** text field.
13. Click the **Save** button to save your changes or Cancel.

Edit an Open House

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click **Open Houses**.
2. Click the desired **Open House**.
3. Edit the Open House as desired.
4. Click the **Save** button to save your changes or Cancel.

Delete an Open House

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click **Open Houses**.
2. Click the **Delete** icon for the desired Open House.

Tip Open Houses imported by the MLS Board cannot be deleted.

REAL ESTATE

COMMUNICATIONS | MEMBERSHIP | FINANCIAL

LONE WOLF WOLFconnect

Showings

With WOLFconnect Showings, Agents and Staff can create and edit showings and track all aspects of showing activity.

Tip Ability to create and edit Showings is dependent on user permission level. See the User Roles section for more detail.

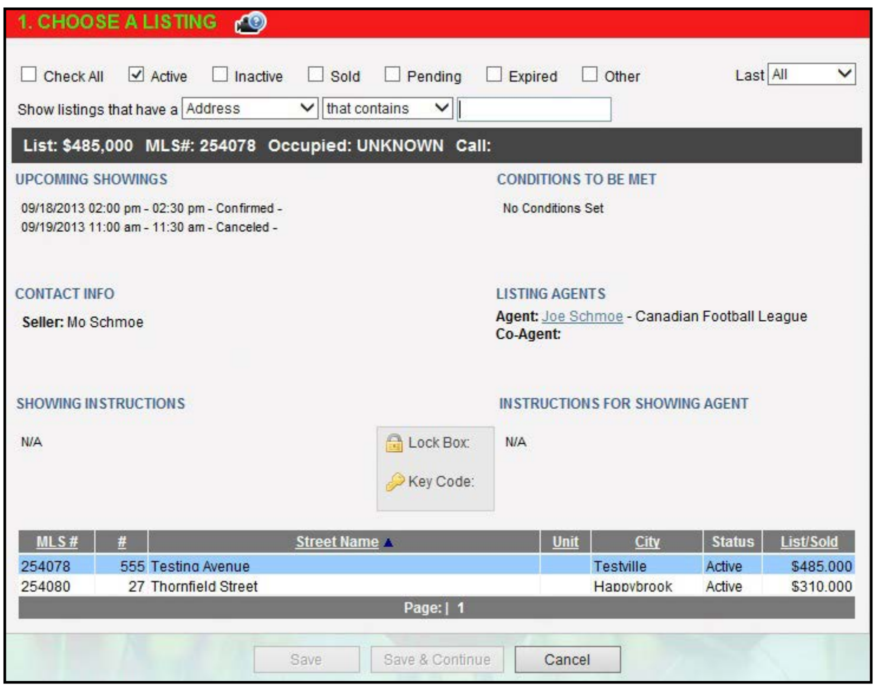
Create a Showing

Select a Listing

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, click **Create**.

(or)

1. Press the **F5** key on your keyboard.



Create A Showing Window

2. Sort Listings by Office, Realtor, Active, Inactive, Sold, Pending, Expired or by Address.
3. Mouse-over individual Listings to display more details on that particular Listing.
4. Click the desired Listing.

Select an Agent

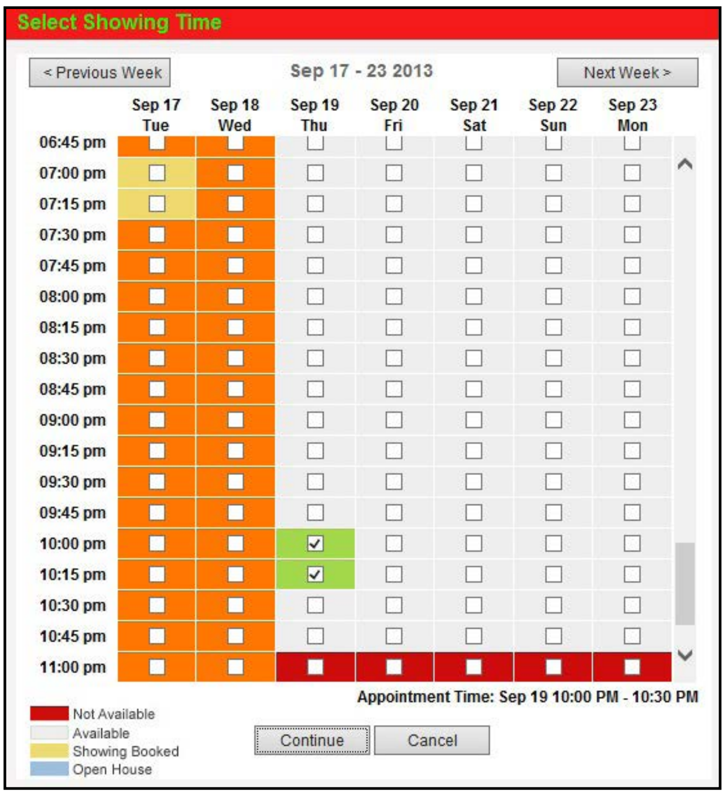
5. Sort Agents by Agent Name, Outside Agent Name, Outside Office Name, Outside Phone Number, Outside Agent MLS ID or Inside Agent Name.

(or)

5. Begin typing in the text field and WOLFconnect will display Agents matching your criteria.
6. Click the desired Agent.

Tip Change the selected Agent at any time by clicking the **Change Agent** button.

Enter Showing Details



Showing Scheduling Window

7. Select a **Showing Time**. Click the **Continue** button to save your changes or Cancel.

Tip Change the Showing Time at any time by clicking the **Set Showing Time** button or using the calendar control and drop-down menu.

8. Select the type of showing from the **Showing Type** drop-down menu.
9. Indicate if the showing is **Confirmed** or **Unconfirmed** with the seller by using the radio buttons.

Tip Selecting Unconfirmed will display the Showing in the Unconfirmed Showings queue. See the Unconfirmed Showings section for more detail.

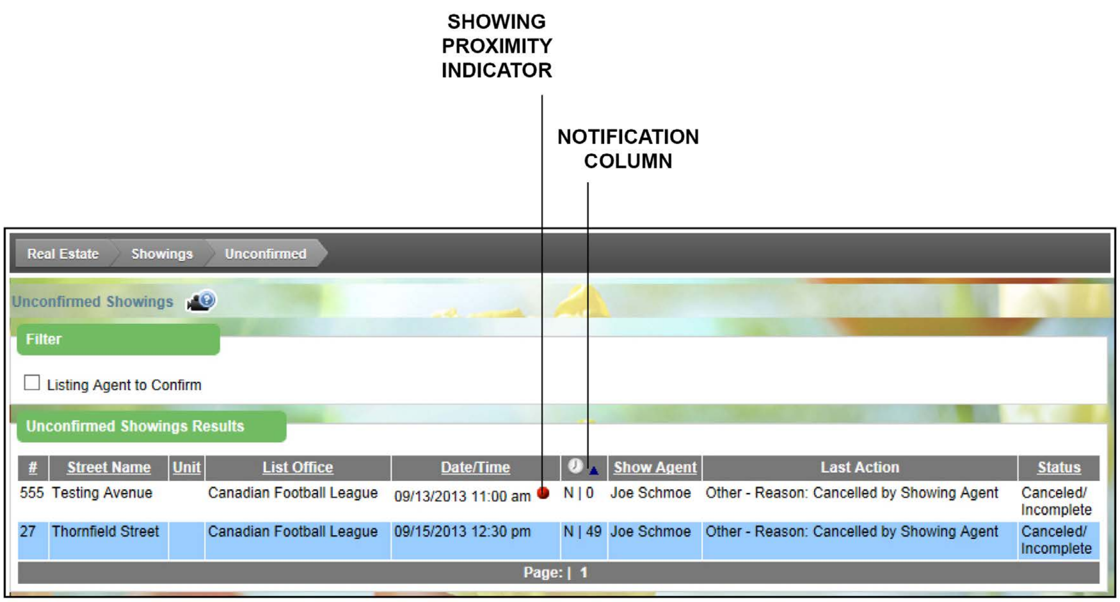
10. Select a call status from the **Call Status** drop-down menu and enter **Call Notes** in the text field.
11. Click the **Save** button to save your changes or Cancel. Click the **Save & Continue** button to save your changes and enter another Showing.

Request a Showing

Within WOLFconnect is the capability for Agents to request a Showing on their own listings or their team member's listings only. This allows an Agent to create a Showing and place it in the Unconfirmed Showings queue for further management by Staff and Front Desk personnel.

To request a showing, follow the steps described in Create a Showing.

Unconfirmed Showings



Unconfirmed Showings Window

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, click **Unconfirmed**.

Showings that have been created or requested and are unconfirmed will appear in the Unconfirmed Showings Widget on the Home Page.

Listing Agent to Confirm

Checking this checkbox ☑ will display Unconfirmed Showings which require the Listing Agent to confirm the Showing with the seller.

Showings which require a Listing Agent Confirmation are marked by an icon LA.

Tip See the Listing section for more detail regarding Listing Agent Confirmation.

Notification Column

The Notification Column displays the number of hours required for advance notification and the number of hours until advance notification is required.

Tip See the Listings section for more detail regarding Showing Notification.

If advance notification is not required the Notification Column will display “N” and the number of hours until the Showing. Mouse-over information in this column to view notification details.

Showing Proximity Indicator

The Showing Proximity Indicator will display when a Showing is scheduled for within two hours and remains unconfirmed or when the Showing time has passed.

Confirming an Unconfirmed Showing

1. In the Navigation menu, click **Real Estate**. In the Showing submenu, click **Unconfirmed**.
2. Click the desired Unconfirmed Showing.
3. Click the **Confirm** button.
4. If desired, populate **Showing Agent Instructions**, **Call Status** and **Call Notes**.
5. Click the **Apply** button to confirm the Showing or Cancel.

Rescheduling an Unconfirmed Showing

1. In the Navigation menu, click **Real Estate**. In the Showing submenu, click **Unconfirmed**.
2. Click the desired Unconfirmed Showing.
3. Click the **Reschedule** button.
4. Set a Showing Time by clicking the **Set Showing Time** button or using the calendar control and drop-down menu.
5. Indicate if the showing is **Confirmed** or **Unconfirmed** with the seller by using the radio buttons.
6. If desired, select a call status from the **Call Status** drop-down menu and enter **Call Notes** in the text field.
7. Click the **Apply** button to save your changes or Cancel.

Refuse an Unconfirmed Showing

1. In the Navigation menu, click **Real Estate**. In the Showing submenu, click **Unconfirmed**.
2. Click the desired Unconfirmed Showing.
3. Click the **Refuse** button.
4. Enter a reason for the refusal in the text field.

5. If desired, select a call status from the **Call Status** drop-down menu and enter **Call Notes** in the text field.
6. Indicate if the showing is **Confirmed** or **Unconfirmed** with the seller by using the radio buttons.
7. Click the **Apply** button to save your changes or Cancel.

Cancelling an Unconfirmed Showing

1. In the Navigation menu, click **Real Estate**. In the Showing submenu, click **Unconfirmed**.
2. Click the desired Unconfirmed Showing.
3. Click the **Cancel Showing** button.
4. Select a reason for the cancellation from **Cancelled by Seller**, **Cancelled by Showing Agent**, **Cancelled by Listing Agent** or **Out of Time**.
5. If desired, select a call status from the **Call Status** drop-down menu and enter **Call Notes** in the text field.
6. Select **Complete** or **Incomplete** using the radio buttons.

Tip Selecting Complete will remove the cancelled Showing completely from Unconfirmed Showings.

Selecting Incomplete will cancel the Showing but it will remain in Unconfirmed Showings for possible reactivation.

7. Click the **Apply** button to confirm the cancellation or Cancel.

Reactivating an Unconfirmed Showing

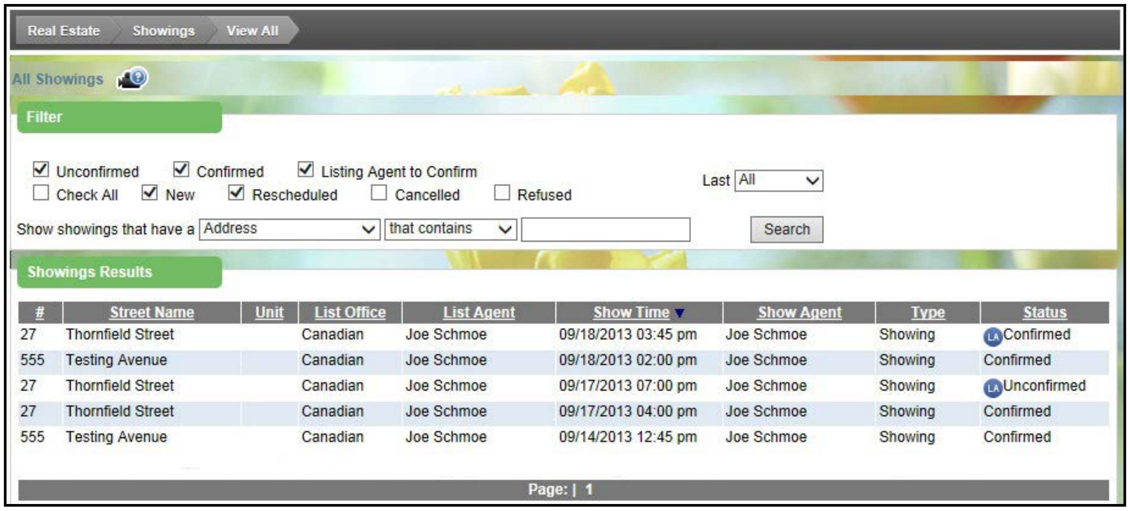
1. In the Navigation menu, click **Real Estate**. In the Showing submenu, click **Unconfirmed**.
2. Click the desired Unconfirmed Showing.
3. Click the **Reactivate** button.
4. If desired, select a call status from the **Call Status** drop-down menu and enter **Call Notes** in the text field.
5. Click the **Apply** button to reactivate the showing or Cancel.

Deleting an Unconfirmed Showing

Tip The ability to delete Unconfirmed Showings permanently is restricted to Administrator access users and above.

1. In the Navigation menu, click **Real Estate**. In the Showing submenu, click **Unconfirmed**.
2. Click the desired Unconfirmed Showing.
3. Click the **Delete** button.
4. A prompt will appear confirming deletion. Click the **OK** button to confirm or Cancel.

All Showings



All Showings Window

1. In the Navigation menu, click **Real Estate**. In the Showing submenu, click **View All**.

Filters

WOLFconnect can display All Showings using filters.

- Unconfirmed
- Confirmed
- Listing Agent to Confirm
- Check All
- New
- Rescheduled
- Cancelled
- Refused
- Date Range (Last)

Feedback

The Feedback Indicator will display for any Showings that have garnered feedback.

1. To add feedback to a specific Showing, click the desired **Showing**.
2. In Logs/Feedback, click **Add Feedback**.
3. Enter feedback regarding the Showing in the text field.
4. Click the **Update** button.
5. Click **Feedback Log** to view any additional feedback.

Tip Feedback can only be entered on Showings that have been confirmed and completed. See the Showing Feedback section for more detail.

Reports

Showing Reports can be used to ensure Agents are working with efficiency and accuracy when showing Listings.

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, click the **Reports** icon .

Showings by Date

A report displaying Showings by date range that includes the Showing Date/Time, MLS #, Address, Showing Agent, Showing Agent Phone Number, Showing Office, Showing Type and Price. Options include the ability to select by Agent and Showing Type.

Showings by Listing

A report displaying Showings scheduled for specific Listings. This report can be generated in Basic or Advanced View for both Agents and Sellers.

Basic View – Report can be generated by Office or Agent with the option to display each Listing on a separate page.

Advanced View – Reports can be generated by Date Range, Office, Agent, Listing Status, Showing Type or by specific Listing along with the ability to display each Listing on a separate page and include Showing Instructions, Showing Agent Instructions, Feedback, Lockbox and Keycode information.

Agent View Option – This option will include Showing Agent information.

Seller View Option – This option does not include Showing Agent information.

Showing by Status

A report displaying the total number of Confirmed, Agent to Confirm, Rescheduled, Cancelled, Refused or Unconfirmed Showings by Agent and the percentage of each Showing status. This report is generated by Office or Agent within a Date Range.

Showings per Price Range/Area

A report displaying the number of scheduled Showings by Price Range within a Date Range.

Top Ten Showings

A report displaying the top ten Listings in total Showings, top ten Showing companies and top ten Showing Agents within a Date Range.

Unconfirmed Showings

A report displaying all currently Unconfirmed Showings by Showing Type which includes MLS #, Address, Listing Office, Listing Agent, Showing Date/Time, Showing Agent, Showing Office, Showing Agent Phone Number and Price.

Showings Settings

1. To access Showings Settings, click **Real Estate** in the Navigation menu. In the Showings submenu, mouse-over the **Settings** icon and click the desired setting.
2. Click the **Save** button to save your changes.

General Settings

Force Call on Create Showing – This setting controls if the user must enter call notes when creating a Showing.

Allow Notes in Unconfirmed Showings – This setting controls if most recent call notes will display in the Unconfirmed Showings window.

Tip Displaying call notes may encourage more complete and succinct note-taking within Showings.

Listing Search Office Default – This setting controls the default office display in the Create a Showing window.

Listing Search Filter Default – This setting controls the default Listing search option in the Create a Showing window.

Agent Search Filter Default – This setting controls the default Showing Agent search option in the Create a Showing window.

Default Days Back for All Showings – This setting controls the number of days previous WOLFconnect will search to display Showings in the All Showings window.

Edit Showing Lock Time – This setting controls the length of time for which WOLFconnect will disable access to a Showing after it has been opened.

Initially Show All Listings – This setting controls if Listings will appear immediately in the Create a Showing window or only after the user selects a filter option.

Listing Agent to Confirm Default Status – This setting controls the default status in the Create a Showing window for Showings that have been set as Listing Agent to Confirm.

Send Only New Showings to LA to Confirm – This setting controls if only notifications of new Showings will be sent to a Listing Agent.

Show Listing Agent to Confirm Showings by Default – This setting controls the default Listing Agent to Confirm Showings setting.

Tip This setting is typically set to Yes for companies where Agents schedule and confirm their own Showings.

Communications

Send Showing Feedback Reminders – This setting controls if feedback requests and reminders will be sent by default.

Tip Agents can override this setting in the Showings tab of their Profile. See the Adding an Agent section for more detail.

Notify Outside Agent Showing Confirmed/Cancelled – This setting controls if WOLFconnect will send notifications to Outside Agents when a Showing has been confirmed or cancelled.

Send Notification – This setting controls when feedback requests will be sent once a Showing has been confirmed and completed.

Copy All Showing Emails – This setting controls if a copy of all email Showing notifications will be sent to the email address entered in this text field.

Send Showing Emails From – This setting controls from whom Showing emails will be sent (Office, Company, Listing Agent).

Showing Details

Display Showing Agent Type – This setting controls if the Showing Agent Types drop-down menu will display within the Showing window.

Default Showing Interval in Minutes – This setting controls the length of time reserved for Showings in the Set Showing Time window.

Popup Showing Time – This setting controls if the Set Showing Time window will appear automatically in the Create a Showing process or only when the button is clicked.

Showing Agent Details

Outside Agents Require Phone – This setting controls if WOLFconnect will require a phone number to be entered for Outside Agents in order to Create a Showing.

Outside Agents Require Email – This setting controls if WOLFconnect will require an email address to be entered for Outside Agents in order to Create a Showing.

MLS

Synch MLS Outside Agents – This setting controls synchronization of Outside Agent databases if provided by an MLS Board.

Synch MLS Seller Info to Company Listing – This setting controls synchronization of Seller Information if provided by an MLS Board.

Synch MLS Showing Instructions to Company Listing – This setting controls synchronization of Showing Instructions if provided by an MLS Board.

Showing Types

Showing Types settings allows creation and editing of Showing Types which will display in the Create a Showing window.

Tip Default Showing Type is indicated by an asterisk *.

Add a Showing Type

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Showing Types**.
2. Click the **Add Entry** button.
3. Enter a name for the showing type in the **Type Name** text field.
4. Enter a description for the showing type in the **Description** text field.
5. Select whether feedback can be received on the showing type using the drop-down menu.
6. Select if the new showing type will be the **Default** by using the checkbox ☑.
7. Click the **Save** button to save your changes or Cancel.

Edit a Showing Type

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Showing Types**.
2. Click the desired **Showing Type**.
3. Edit the Showing Type as desired.
4. Click the **Save** button to save your changes or Cancel.

Delete a Showing Type

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Showing Types**.
2. Click the **Delete** icon .

Tip The Default Showing Type is indicated by an asterisk * and cannot be deleted.

Showing Agent Types

Showing Agent Types settings allows creation and editing of Showing Agent Types which will display in the Create a Showing window.

Tip Showing Agent Type is an optional field for the Create a Showing window. See the Showings – General Settings section for more detail.

Add a Showing Agent Type

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Showing Agent Types**.
2. Click the **Add Entry** button.
3. Enter a name for the showing agent type in the **Type Name** text field.
4. Enter a description for the showing agent type in the **Description** text field.
5. Select if the new showing type will be the **Default** by using the checkbox ☑.

Tip The Default Agent Showing Type is indicated by an asterisk *.

6. Click the **Save** button to save your changes or Cancel.

Edit a Showing Agent Type

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Showing Agent Types**.
2. Click the desired **Showing Agent Type**.
3. Edit the Showing Agent Type as desired.
4. Click the **Save** button to save your changes or Cancel.

Delete a Showing Agent Type

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Showing Agent Types**.
2. Click the **Delete** icon .

Showing Call Status Types

Showing Call Status Types settings allows creation and editing of Showing Call Status Types which will display in the Create a Showing window.

Add a Showing Call Status Type

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Showing Call Status Types**.
2. Click the **Add Entry** button.
3. Enter a name for the showing type in the **Type Name** text field.
4. Click the **Save** button to save your changes or Cancel.

Edit a Showing Call Status Type

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Showing Call Status Types**.
2. Click the desired **Showing Call Status Type**.
3. Edit the Showing Call Status Type as desired.
4. Click the **Save** button to save your changes or Cancel.

Delete a Showing Call Status Type

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Showing Call Status Types**.
2. Click the **Delete** icon.

Outside Agents/Brokers

MLS Boards will sometimes provide a list of Agents/Brokerages that are considered part of the board itself along with contact information for those organizations. This data is stored within the Leads/Contacts module as Business Contacts but can also be viewed and accessed within Showings settings.

Adding an Outside Agent

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Outside Agents/Brokers**.
2. Click the **Add Entry** button.

Tip Adding an Outside Agent can also be accomplished within the Create a Showing window. See the Showings – Create a Showing section for more detail.

3. Enter information accordingly for the Outside Agent.

Tip At minimum, a Company Name and Email Address are required to be entered.

4. Click the **Save** button to save your changes or Cancel.

Edit an Outside Agent

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Outside Agents/Brokers**.
2. Click the desired **Outside Agent**.
3. Edit the Outside Agent as desired.
4. Click the **Save** button to save your changes or Cancel.

Delete an Outside Agent

Tip Outside Agents deleted here that originated from the MLS Board will re-appear at the next MLS Board synchronization. Outside Agents attached to Showings cannot be deleted.

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Outside Agents/Brokers**.
2. Click the **Delete** icon.

Merge Duplicate Outside Agents

Occasionally duplicate records will be created for the same Outside Agent. This can result in inaccurate Showings Reports.

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Outside Agents/Brokers**.
2. Select the Outside Agent records to be merged using the checkboxes ☑.
3. Click the **Merge Agents** button.
4. The next screen will display the selected records. Each record will indicate if the source was MLS or EX (entered into WOLFconnect) and the number of Showings associated with that record.

Tip If applicable, always select the MLS record to merge to using the radio button.

5. Click the **Merge** button.

Showing Email Setup

The Showing Email Setup allows customization of Showing notification emails sent to Agents and Sellers/Tenants.

Tip Showing notification emails will be sent to Showing Agents and Sellers/Tenants from the Primary Email Address of the Listing Agent unless an alternate email address is set in the Company or Office Profile.

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, mouse-over the **Settings** icon and click **Showing Email Setup**.
2. Click the desired email template to edit.

Company Logo

Each template contains a company logo.

1. Click the **Upload New Logo** button.
2. Select an existing logo that was previously uploaded by using the drop-down menu or click the **Browse** button.
3. Select the logo to be used and click the **Open** button. The logo will automatically be resized to fit the email template.

Template Header

Each template can be customized with a unique header.

1. Click the **Upload New Header** button.
2. Select an existing header that was previously uploaded by using the drop-down menu or click the **Browse** button.
3. Select the header to be used and click the **Open** button.

Select Heading Background and Text Colour

Heading background and text colour can be changed to match your company branding.

1. Click the **Heading Background Color** or **Select Heading Text Color** button.
2. Use the colour selection tools to customize the colour.
3. Click the **OK** button.

Content Toggles

Each content option is displayed with a toggle allowing you to enable or disable that content for the particular email.

Red – This content will not appear in the email
Green – This content will appear in the email

Additional Notes

1. Add additional text to an email by enabling additional notes using the **toggle** .
2. Enter any desired text into the text field provided and format.
3. Click the **Save** button to save your changes or Cancel.

Showing Feedback

The Showings feature in WOLFconnect sends a number of automated messages once a Showing has been booked. One of these notifications is the Showing Feedback Request that is sent to the Showing Agent.

Showing Feedback messages that are responded to will be sent to the Listing Agent and recorded within WOLFconnect.

There are 3 types of notifications that Agents can receive:

Feedback Received – Listing Agent

This notification details feedback provided to the Listing Agent by the Showing Agent.

Tip This information can be accessed through the Showing itself. See the Accessing Feedback section for more detail.

Feedback Reminder – Showing Agent

This notification is sent to Showing Agents for Showings booked for internal Listings. Timing of the notification is selected in General Settings.

Tip See the Showings – General Settings section for more detail.

Feedback Reminder – Listing Agent

This notification is a copy of the Feedback Reminder sent to the Showing Agent.

Tip See the Messaging section for more detail on Notification Selection and Notification Format.

Accessing Feedback

Once a Showing is completed any feedback for that Showing can be accessed through the Showing feature in WOLFconnect.

1. In the Navigation menu, click **Real Estate**. In the Showings submenu, click **View All**.
2. Click the desired Showing.

Tip Showings that have garnered feedback will be indicated by the Feedback icon .

3. Click the **Feedback Log** tab.

All feedback for this Showing can be viewed from this window.

Tip Feedback can be entered manually in this window as well by clicking the **Add Feedback** tab, entering the feedback and clicking the **Update** button.

REAL ESTATE

COMMUNICATIONS | MEMBERSHIP | FINANCIAL

LISTINGS
OPEN HOUSES
SHOWINGS
HAVES AND WANTS
loadingDOCS ADMINISTRATION
loadingDOCS DAY-TO-DAY
CONSUMER PORTAL
TRANSACTIONS

LONE WOLF WOLFconnect

Haves and Wants

Haves and Wants is a feature of WOLFconnect which notifies Agents of Listings that have not yet been registered with MLS and specific property requests of Buyers searching for a property.

Agents representing Sellers can post new Haves.

The Have/Want will appear in the Haves and Wants window and be visible to other Agents. When WOLFconnect finds a Listing that matches the criteria set in the Have/Want, the creator of the Have/Want will be notified.

Tip See the Messaging section for more detail on Notifications.

Entering a Have

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click **Haves and Wants**.
2. Click the **New Have** button.
3. Select the **Posting Length** from the drop-down menu.

Tip The Posting Length dictates when the Have posting will expire.

4. Select an MLS Board from the **MLS** drop-down menu.

Tip The selection made here will determine the content of the **MLS Area** drop-down menu.

5. If applicable, enter the **Listing Number** in the text field.
6. Select the **MLS Area** from the drop-down menu.
7. Enter the **Listing Address** information.
8. Enter the **Listing Details**.
9. If applicable, enter **Notes** for the Have in the text field.
10. Select a Listing Photo by clicking the **Browse** button. Select the photo and click **Open**.

Tip There is a maximum file size of 300 KB and only JPG images can be uploaded.

11. Confirm that you have permission from the Seller to present the property using the checkmark ☑.

By sending this message I am stating this seller has given me permission to present this property and I will obtain a written fee agreement prior to showing the property.

12. Click the **Save** button to save your changes or Cancel.

Entering a Want

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click **Haves and Wants**.
2. Click the **New Want** button.
3. Select the **Posting Length** from the drop-down menu.

Tip The Posting Length dictates when the Want posting will expire.

4. Select an **MLS Board** using the radio buttons.

Tip The selection made here will determine the content of the MLS Area selection.

5. Select the **MLS Area** using the checkboxes ☑.
6. Enter the **Client Contact Information**.

Tip Information entered here will create a Client Contact in the Agent's Contact List. See the Contacts and Leads section for more detail.

By default this information will only be visible to the Agent entering the Want.

7. Enter the **Listing Details**.
8. If applicable, enter **Notes** for the Want in the text field.
9. Confirm that you have permission to represent the Buyer using the checkmark ☑.

By sending this message I am stating this buyer has given me permission to present this want.

10. Click the **Save** button to save your changes or Cancel.

Haves and Wants Settings

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, mouse-over the **Settings** icon and click **Haves and Wants General Settings**.

Haves and Wants General Settings

Default MLS Board – This setting controls the default MLS Board selected when entering Haves and Wants.

Tip The areas will populate from Active Listings if you have a Broker-Only feed as opposed to an IDX feed.

Show Contact Info – This setting controls if Buyer contact information will be visible within the Want.

MLS Areas

MLS Areas Settings allows additional areas to be selected for Haves and Wants.

1. Click the desired MLS Board.
2. Click the **Add Entry** button.
3. Enter a name for the MLS Area in the text field.
4. Click the **Save** icon to save your changes or Cancel .

Tip Click the **Edit** icon to edit an MLS Area. Click the **Delete** icon to delete an MLS Area.

MLS Haves and Wants Notifications

This section allows Agents to select specific MLS Areas to receive notifications for.

Tip When no specific MLS Areas are selected the Agent will receive Have and Want notifications for all areas.

1. Click the desired MLS Board.
2. Select the desired individual MLS Areas using the checkboxes ☑.
3. Click the **Save** button to save your changes or Cancel.

Tip Administrators can select MLS Areas for all Agents.

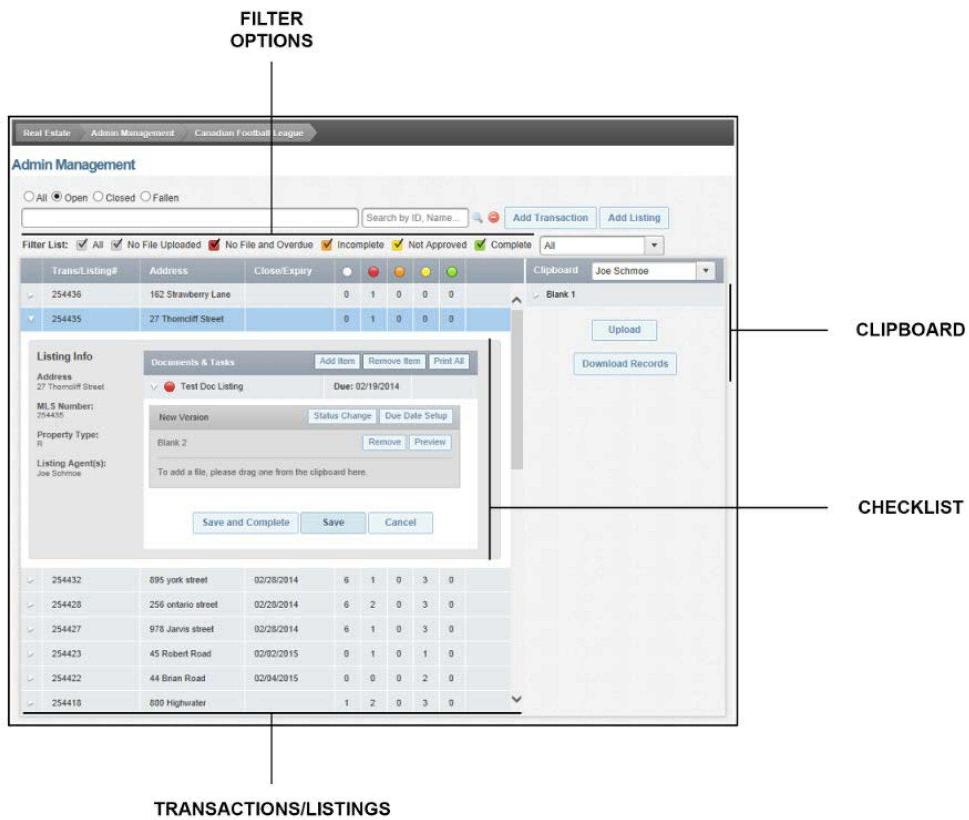
REAL ESTATE

COMMUNICATIONS | MEMBERSHIP | FINANCIAL

- LISTINGS
- OPEN HOUSES
- SHOWINGS
- HAVES AND WANTS
- **loadingDOCS ADMINISTRATION**
- loadingDOCS DAY-TO-DAY
- CONSUMER PORTAL
- TRANSACTIONS

loadingDOCS Administration

loadingDOCS requires administration and configuration of Document and Task Setup, Checklists and Key Contact settings to ensure no Transaction or Listing ever falls through the cracks.



loadingDOCS Management

Documents and Task Setup

Before loadingDOCS can be utilized Documents and Tasks must be configured.

Adding a Document Type

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, mouse-over the **Settings** icon and click **Documents and Task Setup**.
2. Click the desired Office.
3. Click the **Add Document** button.
4. Enter a name for the document in the **Title** text field.
5. Select the **Availability** for the document from the drop-down menu.

Tip Listing Only means the document can only be attached to Listings. Transaction Only means the document can only be attached to Transactions.

6. Select the **Due Date** using the text field and drop-down menu.
7. Select if the document will be visible on Consumer Portals and for which Contact Type using the **Consumer Portal Visibility** drop-down menu.

Tip See the Consumer Portal section for more detail.

8. Click the **Save** button to save your changes or Cancel.

Adding a Task Type

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, mouse-over the **Settings** icon and click **Documents and Task Setup**.
2. Click the desired Office.
3. Click the **Add Task** button.
4. Enter a name for the document in the **Title** text field.
5. Select the **Availability** for the document from the drop-down menu.

Tip Listing Only means the task can only be attached to Listings. Transaction Only means the task can only be attached to Transactions.

6. Select the **Due Date** using the text field and drop-down menu.
7. Click the **Save** button to save your changes or Cancel.

Editing a Document or Task Type

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, mouse-over the **Settings** icon and click **Documents and Task Setup**.
2. Click the desired Office.
3. Click the **Edit** icon for the desired Document or Task.
4. Click the **Edit** button.
5. Edit the Document or Task as desired.
6. Click the **Save** button to save your changes or Cancel.

Deleting a Document or Task Type

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, mouse-over the **Settings** icon and click **Documents and Task Setup**.
2. Click the desired Office.
3. Click the **Delete** icon for the desired Document or Task.
4. A prompt will appear confirming the deletion. Click the **OK** button or Cancel.

Deactivating a Document or Task Type

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, mouse-over the **Settings** icon and click **Documents and Task Setup**.
2. Click the desired Office.
3. Click the **Edit** icon for the desired Document or Task.
4. Click the **Edit** button.
5. Select the **Inactive** checkbox ☑.
6. Click the **Save** button to save your changes or Cancel.

Adding a Document Requirement

Tip This feature is only available to brokerWOLF clients.

1. Within brokerWOLF, click **I – Information Setup**.
2. Enter the **I.3.5** option – **Edit File Requirements**.
3. Click the **Add** button.
4. Enter a new document code in the **Code** text field.
5. Click the **OK** button.
6. Select if brokerWOLF will email the document to the Agent who created the Transaction using the checkbox ☑.
7. Select if the document is required to close the Transaction using the checkbox.
8. Enter a description for the document.
9. Select the **Due Type** from the drop-down menu.
10. Select the **# of Days** after or prior to the Due Type that the document is required.
11. Select the **Document Type** or **Contact Type** from the drop-down menu.

Tip Selecting a Document or Contact will preclude the other from being selected.

12. Select the **Trade Type** from the drop-down menu.
13. Select the **Inactive Date** using the calendar control.
14. Select the **Property Type**.
15. Select the **Classification**.
16. Click the **Store** button.

Checklists

Adding Checklist Items

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, click **Manage**.
2. Click the desired Office.
3. Click the arrow ▷ to expand the desired Transaction/Listing.
4. Click the **Add Item** button.
5. Click the desired Document or Task.

Removing Checklist Items

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, click **Manage**.
2. Click the desired Office.
3. Click the arrow ▷ to expand the desired Transaction/Listing.
4. Click the arrow to expand the Checklist Item.
5. Click the **Remove Item** button.
6. A prompt will appear confirming removal. Click the **Yes** button to confirm removal or No.

Document and Task Checklist Setup

Checklists are used to automatically add required Tasks and Documents to newly created Listings and Transactions.

Creating a Document or Task Checklist

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, mouse-over the **Settings** icon and click **Document and Task Checklist Setup**.
2. Click the desired **Office**.
3. Click the **Add Checklist** button .
4. Enter a name for the checklist in the **Name** text field.
5. Select the checklist type from the **Type** drop-down menu.
6. Indicate whether the checklist will be **Active** by using the checkbox ☑.
7. Select the **Availability** for the document from the drop-down menu.

Tip Listing Only means the checklist can only be used for Listings. Transaction Only means the checklist can only be used for Transactions.

8. Select Property Types and click the **Add** button to add that Property Type to the checklist. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
9. Select the documents and tasks to include in the checklist.

Tip The documents and tasks available to select depend on the selection made in the **Availability** drop-down menu.

10. Click the **Save** button to Save your changes or Cancel.

Editing a Document and Task Checklist

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, mouse-over the **Settings** icon and click **Document and Task Checklist Setup**.
2. Click the desired Office.
3. Click the **Edit** icon for the desired checklist.
4. Click the **Edit** button.
5. Edit the checklist as desired.
6. Click the **Save** button to save your changes or Cancel.

loadingDOCS User Group Setup

User Groups can be created to upload documents so all members of the User Group can access them.

Adding a User Group

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, mouse-over the **Settings** icon and click **loadingDOCS User Group Setup**.
2. Click the desired Office.
3. Click the **Add Entry** button.
4. Enter the name of the user group in the **Group Name** text field.
5. Indicate whether the checklist will be **Active** by using the checkbox ☑.
6. Select users and click the **Add** button to add that user to the User Group. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
7. Click the **Save** button to save your changes or Cancel.

Editing a User Group

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, mouse-over the **Settings** icon and click **loadingDOCS User Group Setup**.
2. Click the desired Office.
3. Click the **Edit** icon .
4. Edit the **User Group** as desired.
5. Click the **Save** button to save your changes or Cancel.

Deleting a User Group

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, mouse-over the **Settings** icon and click **loadingDOCS User Group Setup**.
2. Click the desired Office.
3. Click the **Delete** icon .
4. A prompt will appear confirming deletion. Click the **OK** button or Cancel.

Tip User Groups with users currently assigned to them cannot be deleted.

Downloading Records to FTP

Tip This is relevant to clients who host files on a local FTP server.

Contact the Lone Wolf Support Team to configure loadingDOCS and FTP server functionality.

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, click **Manage**.
2. Click the desired Office.
3. Click the **Download Records** button.

Clicking the **Download Records** button will download all documents attached to a Listing or Transaction within the last 7 days.

Tip Note that users attempting to re-download documents or download documents older than 7 days will be unable to do so.

Contact the Lone Wolf Support Team for assistance in re-downloading or downloading older documents.

loadingDOCS Key Contact

The selected Key Contact will be responsible for reviewing and approving documents attached to Transactions.

Designating a loadingDOCS Key Contact

Tip Access to Office Key Contacts is dependent on user permissions. See the User Roles section for more detail.

1. In the Navigation menu, click **Memberships**. In the Office submenu, click **Manage**.
2. Click the desired Office.
3. Click the **Key Contacts** tab.
4. Click the **Edit** icon for loadingDOCS.
5. Select whether to use the General Contact for loadingDOCS Administration using the **Use General** checkbox ☑.
    a. If Use General is deselected, enter contact information for the chosen Key Contact.
6. Click the **Save** button to save your changes or Cancel.

loadingDOCS Document Management

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, click **Manage**.
2. Click the desired Office.
3. Search for documents of a specific status using the **Filter** checkboxes ☑.
4. Click the arrow ▷ to expand the desired Transaction/Listing.
5. Click the arrow to expand the Checklist Item.
6. Click the **Preview** button to view a document.

Reject a Document

1. Click the **Status Change** button.

Tip Clicking the Status Change button displays the Document Status Change history as well as document review options.

2. If applicable, enter a **Note** explaining the reason for the Rejection.
3. Click the **Incomplete** button.

Tip An email will be sent to the Agent who owns the Transaction/Listing notifying them of the Status Change.

Approve a Document

1. Click the **Status Change** button.

Tip Clicking the Status Change button displays the Document Status Change history as well as document review options.

2. If applicable, enter a **Note** explaining the reason for the Approval.
3. Click the **Complete** button.

Managing Due Dates

All documents are given a Due Date based on settings configured in Document and Task Setup.

Custom Due Dates can be configured when default Due Dates are not applicable.

1. Click the **Due Date Setup** button.
2. Select if a **Default** or **Specific Date** will be used using the radio buttons.
    a. If Specific Date is selected, enter a date using the calendar control.
3. Select if a **Reminder** will be sent once the Due Date approaches using the drop-down menu.
4. Click the **Save** button to save your changes or Cancel.

brokerWOLF Integration

Tip brokerWOLF integration with loadingDOCS is available only to brokerWOLF clients.

Once a document is attached to a Transaction it can be viewed within brokerWOLF.

1. Within brokerWOLF, click **2 – Transaction Records**.
2. Enter the **2.1** option – **Transactions**.
3. Click the **Docs** button.

Tip The Docs button will highlight yellow Docs... when documents are connected to the Transaction in WOLFconnect.

4. Click the **Yes** button to download documents from loadingDOCS or click No.
5. A prompt will appear displaying loadingDOCS download status. Click the **OK** button.
6. The 2.1.D – Trade Documents window will open displaying documents attached to the Transaction.

Documents imported from loadingDOCS will be indicated by a "Yes" in the loadingDOCS column.

Tip Double-click a loadingDOCS document to preview it.

REAL ESTATE

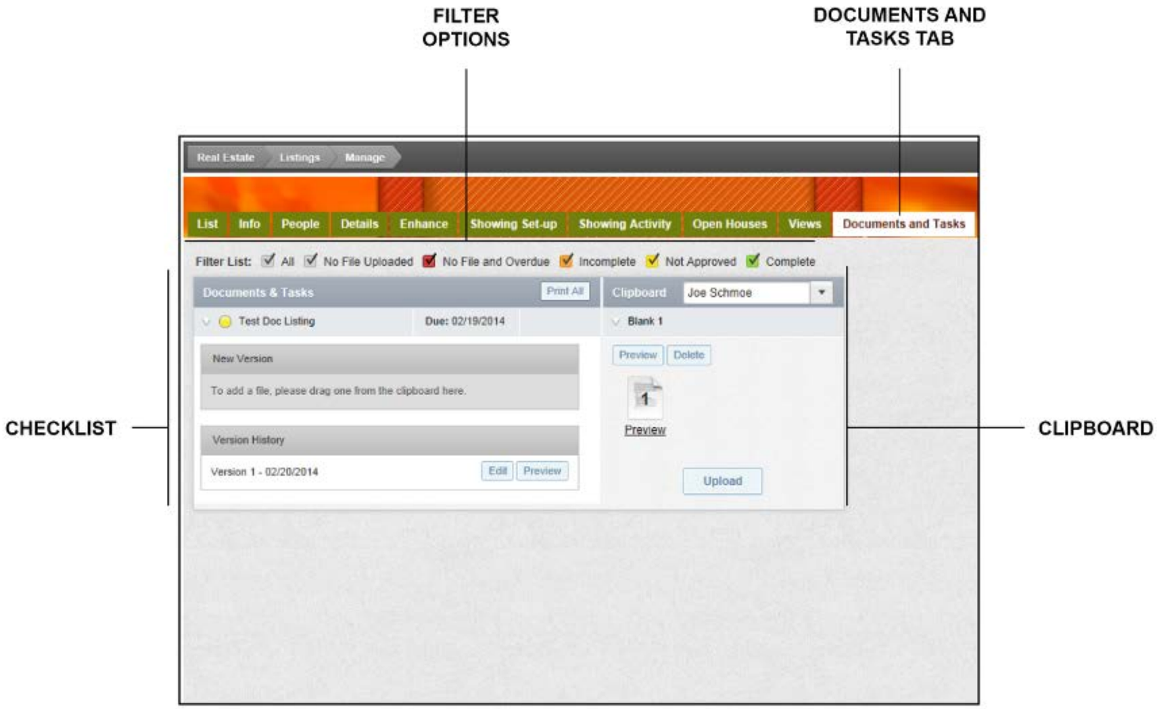
COMMUNICATIONS | MEMBERSHIP | FINANCIAL

LISTINGS
OPEN HOUSES
SHOWINGS
HAVES AND WANTS
loadingDOCS ADMINISTRATION
loadingDOCS DAY-TO-DAY
CONSUMER PORTAL
TRANSACTIONS

LONE WOLF WOLFconnect

loadingDOCS Day-to-Day

Day-to-day functions in loadingDOCS allow Users to keep track of tasks and attach documents related to Listings and Transactions.



loadingDOCS Window

Uploading a Document

Tip Only PDF documents can be uploaded to loadingDOCS. Documents uploaded from brokerWOLF cannot be deleted within WOLFconnect.

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, click **Clipboard**.
2. Click the desired Office.
3. Select a User or User Group from the drop-down menu.

Tip The uploaded document will be available when the user is attaching a Document or Task to a Transaction/Listing. See the Attaching Documents section for more detail.

4. Click the **Upload PDF** button, select a document and click **Open**.

Tip To upload multiple documents, press and hold the **CTRL** key on your keyboard and click each desired file before clicking **Open**. This ability is not available for users of Internet Explorer 9 and lower.

Previewing a Document

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, click **Clipboard**.
2. Click the desired Office.
3. Select a user from the drop-down menu.

Tip The uploaded document will only be available when the user is attaching a Document or Task to a Transaction/Listing. See the Attaching Documents section for more detail.

4. Click the desired document.
5. Preview individual pages by clicking **Preview** or preview the entire document by clicking the **Preview** button.

Deleting a Document

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, click **Clipboard**.
2. Click the desired Office.
3. Select a User or User Group from the drop-down menu.
4. Click the desired document.
5. Click the **Delete** button.
6. A prompt will appear confirming deletion. Click **OK** button to confirm deletion or Cancel.

Uploading a Document using Email

Documents can be uploaded to a Clipboard using a custom email address allowing Buyers, Sellers and Business Contacts to submit documents to a loadingDOCS Clipboard with ease.

All loadingDOCS users are given a loadingDOCS Email Address that can be distributed at their discretion.

The following criteria must be met for the email to be accepted:

- Email must have a PDF attached
- Email cannot contain more than two attachments
- PDF file size must be less than 10 MB
- Email must be addressed to two or fewer loadingDOCS.com email addresses

Tip This prevents spam from being sent to multiple users.

If the email does not meet these criteria the sender will receive an email explaining that the loadingDOCS email upload was unsuccessful.

Notifications

- If the email does not meet the above criteria the sender will receive an email explaining that the loadingDOCS email upload was unsuccessful
- Senders receive a notification if the loadingDOCS email upload was unsuccessful
- Agents will receive a notification when a new PDF is uploaded to their loadingDOCS Clipboard

loadingDOCS Email Address

Users require a loadingDOCS Email Address in order to upload documents to their Clipboard. loadingDOCS Email Addresses can be changed in Membership Profiles.

1. In the Navigation menu, click **Membership**. In the Agents/Staff submenu, click **Manage**.
2. Click the desired user.
3. Click the **Profile** tab.
4. Click the **Edit** button.
5. Enter a username in the **loadingDOCS Username Email** text field.
6. Click the **Save** button.

Tip Agents will receive a welcome email upon Profile creation or when their loadingDOCS Username Email is changed.

Attaching Documents

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click **Manage**.
2. Click the desired Office.
3. Click the arrow ▷ to expand the desired **Transaction/Listing**.
4. Click the desired Document or Task Type.
5. Click and drag a document from the Clipboard to the Checklist.

Tip Remove a document from a checklist at any time by clicking the **Remove** button.

6. Click the **Save** button to save your changes or Cancel.

Attaching Pages from a Document

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, click **Manage**.
2. Click the desired Office.
3. Click the arrow ▷ to expand the desired Transaction/Listing.
4. Click the desired Document or Task Type.
5. Click the arrow to expand the desired Document.
6. Press and hold the **CTRL** key on your keyboard and click the desired pages.
7. Click and drag the documents from the Clipboard to the Checklist.

Submission for Approval

1. In the Navigation menu, click **Real Estate**. In the Transactions submenu, click **Manage**.
2. Click the desired **Transaction/Listing**.
3. Click the arrow ▷ to expand the desired **Transaction/Listing**.
4. Click the arrow to expand the **Checklist Item**.
5. Click the **Status Change** button.
6. Click the **Submit for Review** button.

Notifications

For any Transaction or Task to which you attach documents, you will receive Notifications from the Office loadingDOCS Key Contact informing you of Status Changes.

Tip See the Granting Access and User Roles section for more detail on roles such as the loadingDOCS Key Contact.

Daily reminders are also sent for any documents flagged as overdue.

Tip See the Messaging section for more detail on how to configure Notifications.

REAL ESTATE

COMMUNICATIONS | MEMBERSHIP | FINANCIAL

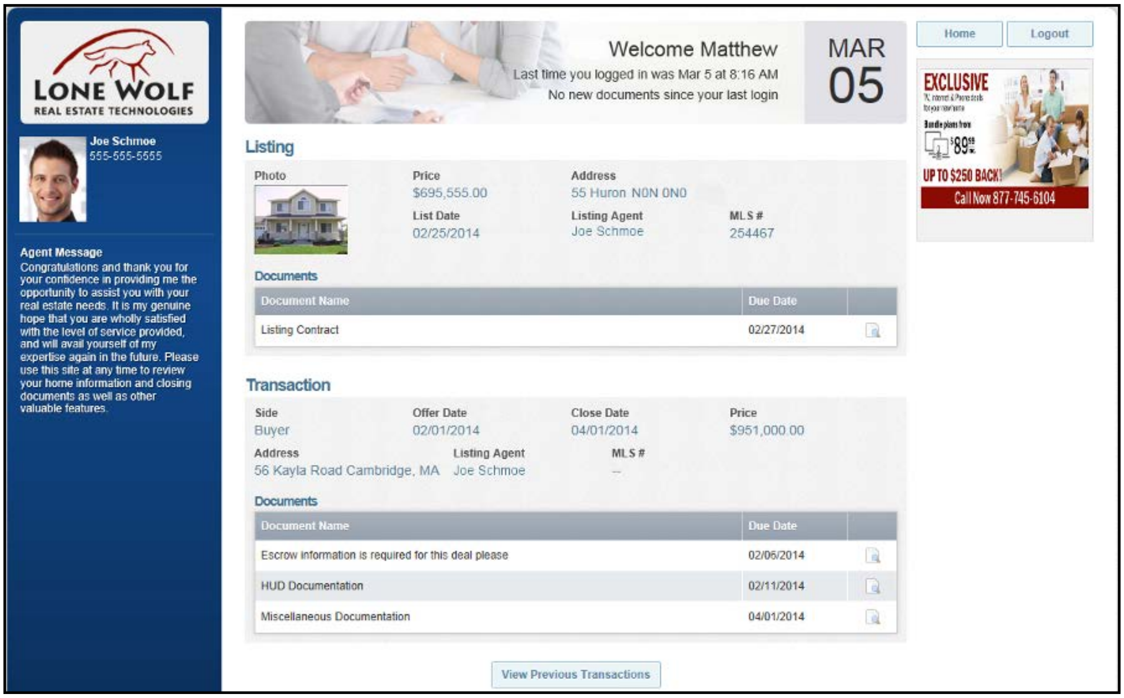
LISTINGS
OPEN HOUSES
SHOWINGS
HAVES AND WANTS
loadingDOCS ADMINISTRATION
loadingDOCS DAY-TO-DAY
CONSUMER PORTAL
TRANSACTIONS

LONE WOLF WOLFconnect

Consumer Portal

The Consumer Portal allows Buyers and Sellers to access important documents, Listings and Transactions on an Agent-branded WOLFconnect site and take advantage of great offers through movingWOLF.

Tip Visit www.lwolf.com/movingwolf for more detail on movingWOLF.



Consumer Portal

Activating the Consumer Portal

Tip Only Client Contacts can be given access to the Consumer Portal and are automatically given access when added to a Listing or Transaction as a Buyer or Seller. See the Contacts and Leads section for more detail.

1. In the Navigation menu, click **Contact Management**. In the Contacts and Leads submenu, click **Contacts**.
2. Select the desired Client Contact.
3. Click the **Contact Information** tab.
4. Under **loadingDOCS Consumer Portal**, select the **Enabled** checkbox ☑.
5. Upon saving, a Welcome Email will be sent to the email address entered in the **Username** text field.

Tip The Username is automatically generated using the primary email address for the Client Contact.

Welcome Email

The Consumer Portal is accessed through www.yourhomepulse.com.

Upon Consumer Portal activation the Client Contact is sent a Welcome Email containing instructions on how to create their Consumer Portal Password.

1. Open the email from lwolf.com.
2. Click the link contained in the email. This will bring you to the Consumer Portal Login Page - yourhomepulse.com.
3. Enter a new password in the **New Password** text field.
4. Enter the same password in the **Confirm Password** text field.
5. Click the **Save** button.

Resetting a Consumer Password

Tip Agents are responsible for resetting Consumer passwords upon request.

1. In the Navigation menu, click **Contact Management**. In the Contacts and Leads submenu, click **Contacts**.
2. Select the desired Client Contact.
3. Click the **Contact Information** tab.
4. Under **loadingDOCS Consumer Portal**, deselect the **Enabled** checkbox ☑.
5. Click the **Save** button.
6. Select the **Enabled** checkbox.
7. Click the **Save** button to save your changes or Cancel.

Tip This will re-send the Welcome Email to the Consumer allowing them to choose a new password.

Consumer Portal Agent Information

1. In the Navigation menu, click **Membership**. In the Agent/Staff submenu, click **Manage**.

Tip Agents configuring their own Consumer Portal Agent Information can click the **Settings** icon beside their Profile picture to access their Profile Information.

2. Click the desired Agent.
3. Click the **Public Profile** tab.
4. Click the **Consumer Portal** profile.
5. Each category can be enabled or disabled by clicking the **toggle** . Using the toggle will enable or disable that category for the Consumer Portal profile.
6. Deselect the **Portal Message** checkbox ☑ to enter a custom Agent Message that will be displayed below the Agent branding in the Consumer Portal.

Tip A category can be enabled in the WOLFconnect Profile but disabled in the Consumer Portal by deselecting the checkmark beside the category on the right side of the screen.

7. Publish the Consumer Portal information by selecting **Yes** in the **Publish** drop-down menu in the top-right of the screen.
8. Click the **Save** button to save your changes or Cancel.

Portal Documents

Tip Only Administrators are able to select which Documents appear in the Consumer Portal for either the Buyer or Seller. By default no Documents are available for viewing in the Consumer Portal.

1. In the Navigation menu, click **Real Estate**. In the loadingDOCS submenu, mouse-over the **Settings** icon and click **Document and Task Setup**.
2. Click the desired Office.
3. Click the desired Document.
4. Click the **Edit** button.
5. Select the visibility of the Document from the **Document Visibility** drop-down menu.

Tip Buyer displays the Document on Consumer Portals for Client Contacts set as Buyers. Seller displays the Document on Consumer Portals for Client Contacts set as Sellers.

To configure visibility settings for Portal Transactions, see the Portal Transactions section.

6. Select the **Show on Consumer Portal** checkbox ☑.
7. Click the **Save** button to save your changes or Cancel.

Portal Listings

Client Contacts will need to be added to the People tab within a Listing in order to display the Listing information on their Consumer Portal.

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click **Manage**.
2. Click the desired Office.
3. Click the desired Listing.
4. Click the **People** tab.
5. In the **Seller Info** section, click the **Add Client Contact** button.
6. In the **Contact Name** text field, select the Client Contact by typing in the text field and clicking the desired Client Contact Name.

Tip Note that a previously entered Client Contact must be selected. Consumer Portals cannot be created for a non-existent Client Contact.

7. Click the **Save** button to save your changes or Cancel.

Tip The same Client Contact can be used for multiple Listings and Transactions to ensure their one Consumer Portal Login contains all of their data.

Portal Transactions

Tip Selecting which Transaction Documents are visible through the Consumer Portal is done within brokerWOLF.

brokerWOLF Transaction Document Visibility

1. In brokerWOLF, navigate to **I.3.5 – Edit File Requirements**.
2. Select the desired document.
3. Click the **Edit** button.
4. Select the visibility of the Document from the loadingDOCS Visibility drop-down menu.

Tip Listing Agent displays the Document on Listing Agent Consumer Portals. Selling Agent displays the Document on Selling Agent Consumer Portals.

5. Click the **Store** button to save your changes or Cancel.

WOLFconnect Transaction Visibility

Client Contacts will need to be added as a Buyer or Seller within a Transaction in order to display the Transaction information on their Consumer Portal.

Tip If a Transaction is created from a Listing the Client Contact on the Listing is automatically transferred to the Transaction.

1. In the Navigation menu, click **Real Estate**. In the Transactions submenu, click **Add**.
2. Click the desired Office.
3. Enter Transaction Information.

Tip See the Transactions section for more detail.

4. Click the **Save** button to save your changes or Cancel.
5. Click the **Add Seller or Buyer** button.
6. Select the **Contact Type** from the drop-down menu.
7. In the **Search By** text field, select the Seller or Buyer by typing in the text field or clicking the **Look-Up** icon.
8. Click the **Save** button to save your changes or Cancel.

REAL ESTATE

COMMUNICATIONS | MEMBERSHIP | FINANCIAL

Transactions

Transactions can be entered by an Agent into WOLFconnect using the Electronic Deal Sheet (EDS). EDS works in conjunction with loadingDOCS to provide the best way in the industry to keep transactions and documents organized.

Tip brokerWOLF clients have the capability to import transactions into brokerWOLF for processing.

Adding a Transaction

1. In the Navigation menu, click **Real Estate**. In the Transactions submenu, click **Add**.
2. Click the desired Office.
3. If this is a Transaction for a Company Listing, enter the MLS # in the **MLS #** text field or click the **Look-Up** icon and the Address will automatically populate.

or

3. Manually populate the information for **Outside Listings**.

Tip Required fields are indicated by a red asterisk *.

4. Select a **Classification** using the drop-down menu.
5. Select a **Property Type** using the drop-down menu.

Tip See the Listings section for more detail on Property Types.

6. Enter a selling price in the **Sell Price** text field.
7. Select an **Offer Date** and **Close Date** using the calendar control.
8. Select if the offer is **Firm** or **Conditional** using the radio buttons.

Commission Information

9. Click **Add Commission**.
10. In the Transaction Commission window, select the **Agent** by typing in the text field or clicking the **Look-Up** icon .
11. Select the **Side** from the drop-down menu.
12. Enter the **Side Count** using the text field.

Tip If Office Double Ender is chosen as the Side the Side Count should equal 2. If not, a prompt will appear asking for confirmation.

13. Enter **Agent Gross Percentage** and/or **Agent Gross Commission** using the text fields.
14. Click the **Save** button to save your changes or Cancel.
15. Populate any relevant **Seller/Buyer**, **Business Contacts** and **Outside Broker** information.

Tip If another Agent attempts to create a transaction similar to yours, they will receive a warning advising them of the existing transaction.

Conditions

1. Click the **Add Condition** button.

Tip Required fields are indicated by a red asterisk *.

2. Select the Condition from the **Condition to be Met** drop-down menu.
3. Select the **Due Date** using the calendar control.

Tip Once a Condition is met the Transaction must be updated by clicking the **Edit** icon and selecting the **Condition Met Date** using the calendar control.

4. Click the **Save** button to save your changes or Cancel.

Sellers and Buyers

1. Click the **Add Seller or Buyer** button.
2. Select the **Contact Type** from the drop-down menu.
3. In the **Search By** text field, select the Seller or Buyer by typing in the text field or clicking the **Look-Up** icon.

Tip See the Contacts and Leads section for more detail.

or

3. Enter the Seller or Buyer information manually.

Tip Required fields are indicated by a red asterisk *.

4. Determine if the Seller or Buyer will receive movingWOLF emails using the **Send movingWOLF Emails** checkbox ☑.
5. Click the **Save** button to save your changes or Cancel.

Business Contacts

1. Click the **Add Business Contact** button.
2. Select the **Contact Type** from the drop-down menu.
3. Select the Side the Business Contact represents from the **Side** drop-down menu.
4. In the **Search By** text field, select the Business Contact by typing in the text field or clicking the **Look-Up** icon.

Tip See the Contacts and Leads section for more detail.

or

4. Enter the Business Contact information manually.

Tip Required fields are indicated by a red asterisk *.

5. Click the **Save** button to save your changes or Cancel.

Outside Brokers and Referrals

1. Click the **Add Outside Broker or Referral** button.
2. Select the **Contact Type** from the drop-down menu.
3. Select the Side the Outside Broker or Referral represents from the **Side** drop-down menu.
4. Enter the **Gross Commission** owed to the Outside Broker or Referral in the text field.
5. In the **Search By** text field, select the Outside Broker or Referral by typing in the text field or clicking the **Look-Up** icon.

Tip See the Contacts and Leads section for more detail.

or

5. Enter the Outside Broker or Referral information manually.

Tip Required fields are indicated by a red asterisk *.

6. Click the **Save** button to save your changes or Cancel.

Notes Tab

The Notes tab is used to enter notes about the specific Transaction.

1. To add a Note to the Transaction, click the **Add Note** button.
2. Select the type of Note from the **Type** drop-down menu.
3. Indicate if the note will be private by selecting the **Private** checkbox ☑.
4. Enter the note in the **Note** text field.
5. Click the **Save** button to save your changes or Cancel.

Deleting Pending Transactions

Tip Once a Transaction is entered into WOLFconnect it is considered Pending. Submission to brokerWOLF for approval is required to remove the Pending status before deleting a Transaction completely.

1. In the Navigation menu, click **Real Estate**. In the Transactions menu, click **Manage**.
2. Click the desired Office.
3. Click the desired Transaction.
4. Click the **Submit** button.
5. In brokerWOLF, navigate to **2.I.1 – WOLFtracks Import**.
6. Click the **Live Update** button.
7. Confirm update parameters and click the **Proceed** button.
8. Click the **Exit** button upon completion.

9. Select the Transaction and click the **Add** button.
10. Close 2.I.1 and navigate to **2.1 – Trades**.
11. Select the Transaction and click the **Edit** button.
12. Click the **Delete** button.
13. A prompt will appear confirming deletion. Click the **Yes** button to confirm or No.
14. Click the **Exit** button. This will delete the Transaction from WOLFconnect as well.

Managing Transactions

1. In the Navigation menu, click **Real Estate**. In the Transactions menu, click **Manage**.
2. Click the desired Office.
3. Click the desired Transaction.

Submitting Transactions to brokerWOLF

When an Office Administrator or Agent adds a Transaction to WOLFconnect they have the ability to submit those Transactions to brokerWOLF for approval.

Tip This feature is only available to brokerWOLF clients.

1. In the Navigation menu, click **Real Estate**. In the Transactions submenu, click **Manage**.
2. Click the desired **Office**.
3. Click the desired **Transaction**.
4. Click the **Submit** button.

Tip Until the Transaction is approved within brokerWOLF it can be edited within WOLFconnect. Once accepted any changes will need to be performed by the Listing Administrator.

Accepting a Submitted Transaction

1. In brokerWOLF, navigate to **2.1.1 – WOLFtracks Import**.
2. Click the **Live Update** button.
3. Choose to update from the Previous Update point using the drop-down menu or select a custom update point using the calendar control.
4. Click the **Proceed** button.
5. A window will appear detailing the updates. Click the **OK** button.
6. Click the **Exit** button.
7. A window will appear displaying Transactions ready for import to brokerWOLF. Click the desired Transaction.
8. Click the **Add** button.
9. Click the **Apply** button once Transaction information is verified as correct.
10. Click the **Store** button.

Tip The Transaction will be moved from the Import window to 2.1 – Transaction Records.

Deleting Transactions

1. In brokerWOLF, navigate to **2.1 – Transaction Records**.
2. Click the desired Transaction.
3. Click the **Delete** button.
4. A prompt will appear confirming deletion. Click the **Yes** button to confirm or No.

Tip If the Transaction has postings made against it you will need to Finalize the Transaction as Fallen Thru instead of deleting.

Uploading to WOLFconnect from brokerWOLF

Individual Upload

1. In brokerWOLF, navigate to **2.1 – Transaction Records**.
2. Click the **Add** button.
3. Populate the Transaction information.
4. Click the **Store** button.

The Transaction will automatically be available in WOLFconnect. See the Managing Transactions section for more detail.

Mass Upload

1. In brokerWOLF, navigate to **2.U.1 – WOLFtracks/WOLFconnect**.
2. Select the **Month** and **Year** from which to sync historical Transaction data to WOLFconnect.
3. Click the **Screen** button.
4. A report will appear. Verify the Transaction information and close the report.
5. A prompt will appear confirming upload. Click the **Yes** button to confirm or No.
6. A second prompt will appear confirming update of client data. Click the **Yes** button to confirm or No.

Tip A report may appear displaying sync issues. This is a list of Transactions that could not successfully upload to WOLFconnect and will need to be corrected. Uploading can be finished regardless of if this report is displayed but any Transactions in the report will not be uploaded.

Contact the Lone Wolf Support Team at support@lwolf.com for assistance in interpreting the report.

7. A window will appear confirming upload. Click the **OK** button.

COMMUNICATIONS

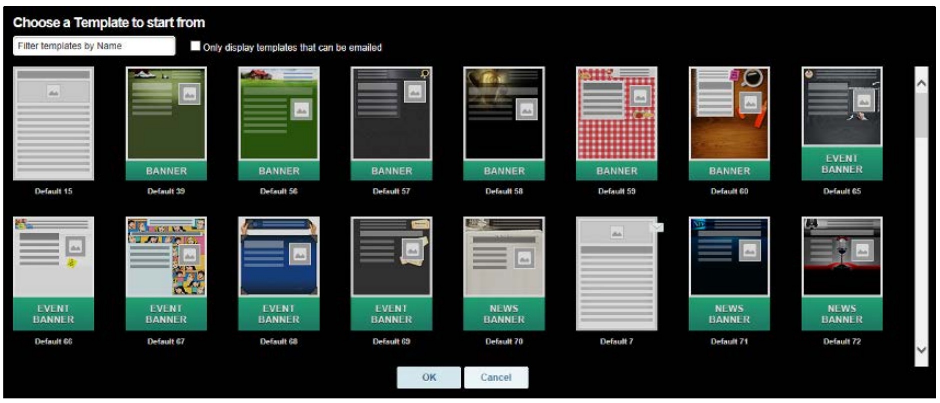
Content such as News, Links and Photos can be added to WOLFconnect to assist in keeping your team informed at all times.

News

Create a News Item

Office News content will display in the News Widget on the WOLFconnect Home Page. Good examples of News content are new employee welcome messages, office hour changes and awards acclaim.

1. In the Navigation menu, click **Communications**. In the News submenu, click **Add**.
2. Enter the news item name in the **Title** text field.
3. Select the submitter by typing in the **Submitted By** text field or clicking the **Look-Up** icon .
4. Enter the **Expiry Date** by typing in the text field or using the calendar control.
5. Click the **Create News Item** button or if you wish to use an existing news item as a template, click the **Copy Existing News Item** button.



Template Selection

6. Select a **Template** to use to display your news item. Click the **OK** button.
   a. You can filter template by **Name** by using the text field.
   b. You can display only templates that can be emailed by using the checkbox ☑.
   c. Templates that are displayed in the Display Board are indicated by a green Banner, Event Banner or News Banner indicator.

Tip Templates can be changed at any time. No changes will be lost if a template with the same number of images is chosen.

7. Enter a name for the content in the **Content Name** text field.
8. Select an image to use with your template by clicking the **Choose Image** button.
9. Click the **Browse** button, select an image and click **Open**.
10. Resize the image by clicking and dragging the image frame, using the Image Preview as a guide.
11. Click the **Save** button to save your changes or Cancel.
12. Enter a **Headline** and **Body** for your news item by clicking the **Edit** buttons.
13. Click the **Save** button to save your changes or Cancel.

14. Click the **Save Draft** button.

or

15. Click the **Publish** button.

Tip Saving a Draft or Publishing needs to be done before configuring Visibility. Default Visibility settings display the News item to all users.

Visibility

Editing visibility settings allows customization of who can view a News item.

1. Click **Communications** in the Navigation menu. In the News submenu, click **Manage**.
2. Click the **News** item you wish to edit.

Tip If the desired News item is not visible, use the All, Active and Inactive radio buttons and text field to search for the item.

3. Click the **Visibility** tab.
4. Click the **Edit** button.
5. Select the **Member Type** that will have access to the news item by using the radio buttons.
6. Select which specific users will have access to the news item. Check the **Member All** checkbox ☑ if all users will have access or select specific users by using the **Add** and **Remove** buttons.
7. Click the **Save** button to save your changes or Cancel.

Edit a News Item

1. In the Navigation menu, click **Communications**. In the News submenu, click **Manage**.
2. Click the desired **News** item.
3. Click the **Edit** button.
4. Edit the News item as desired.
5. Click the **Save** button to save your changes or Cancel.

Links

Add a User Link

1. In the Navigation menu, click **Communications**. In the Links submenu, click **User**.

Tip This process is to create User Links which can only be viewed by the User who created them. To create Office-wide Links, see the Add an Office Link section.

2. Click the **Add Link** button.
3. Enter a name for the link in the **Name** text field.
4. Enter the URL for the link in the **URL** text field.

Tip "http://" must be entered before the URL for the link to work properly.

5. Select the order in which the link will appear in the **Order** SpinEdit control.
6. Select whether the link is Active by using the checkbox ☑.
7. Click the **Next** button.

Create a Links Category

A Links category must be created before Office Links can be added to the WOLFconnect Home Page.

Tip By default there is one Links category named Office Links.

1. In the Navigation menu, click **Communications**. In the Links submenu, click the **Settings** icon.
2. Click the **Add Link Category** button.
3. Enter a name for the **Link Category** in the text field.
4. Click the **Save** icon to save your change or Cancel.

Add an Office Link

Now that a Links category has been created, individual Office Links can be added to that category.

Tip Multiple Office Links Widgets can be added to the Home Page to display different Link Categories. See the Widgets section for more detail.

1. In the Navigation menu, click **Communications**. In the Links submenu, click **User**.
2. Click the **Add Link** button.
3. Enter a name for the link in the **Name** text field.
4. Enter the URL for the link in the **URL** text field.
5. Select the category to which the link will be added from the **Category** drop-down menu.

Tip "http://" must be entered before the URL for the link to work properly.

6. Select the order in which the link will appear in the **Order** SpinEdit control.
7. Select whether the link is Active by using the checkbox.
8. Click the **Next** button.
9. Select the **Member Type** that will have access to the link by using the radio buttons.
10. Select which specific users will have access to the link. Check the **Member All** checkbox if all users will have access or select specific users by using the **Add** and **Remove** buttons.
11. Click the **Save** button to save your changes or Cancel.

Photo Album

Photo Album content will display in the Photo Album Widget on the WOLFconnect Home Page. Post pictures of company events and fun office activities here.

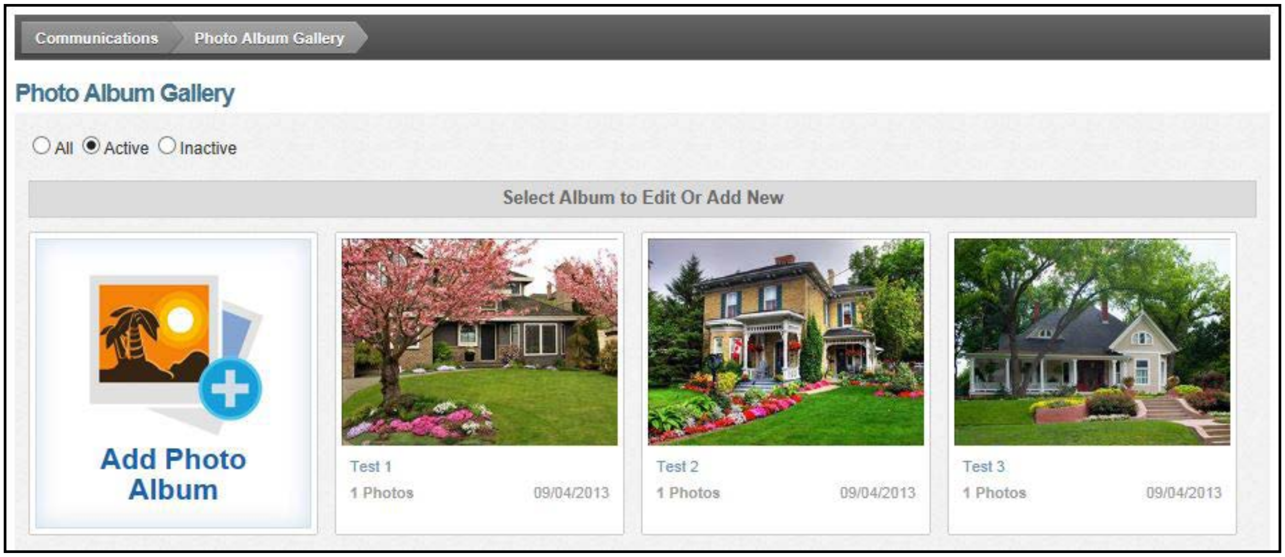


Photo Album Gallery

Create a Photo Album

1. In the Navigation menu, click **Communications**. In the Photo Album submenu, click **Gallery**.
2. Click **Add Photo Album**.
3. Enter the name of the album in the **Album Name** text field.
4. Enter an **Expiry Date** using the text field or by using the calendar control.
5. Add a photo to the album by clicking the **Add Photos** button, select an image and click **Open**. Repeat for multiple photos.
6. If desired, enter a caption for each photo in the **Caption** text field.
7. Click the **Save** button to save your changes or Cancel.

Tip Photos Albums cannot be deleted but can be set as Inactive by setting an Expiry Date.

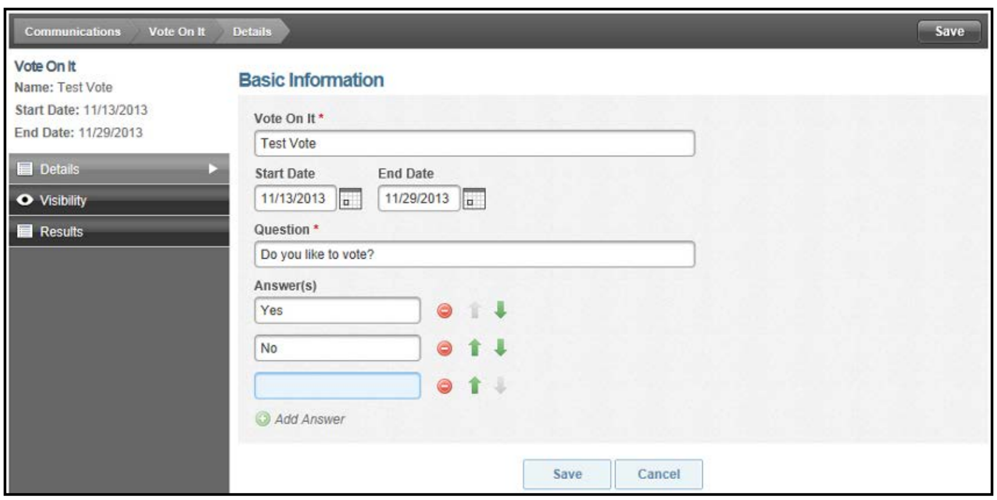
Visibility

Editing visibility settings allows customization of who can view the Photo Album.

1. In the Navigation menu, click **Communications**. In the Photo Album submenu, click **Gallery**.
2. Click the **Photo Album** you wish to edit.
3. Click the **Visibility** tab.
4. Click the **Edit** button.
5. Select which offices will be able to view the event. Check the **Office All** checkbox ☑ if all offices will have access or select specific offices by using the **Add** and **Remove** buttons.
6. Select the **Member Type** that will have access to the event by using the radio buttons.
7. Select which specific users will have access to the event. Check the **Member All** checkbox if all users will have access or select specific users by using the **Add** and **Remove** buttons.
8. Click the **Save** button to save your changes or Cancel.

Vote On It

Tip The ability to create and edit Vote On It polls is enabled for Administrators only by default. See the User Roles section for more detail.



Creating a Vote On It Poll

1. In the Navigation menu, click **Communications**. In the Vote On It submenu, click **Add**.
2. Enter a name for the **Vote On It** poll.
3. Select a **Start Date** and **End Date** for the poll using the calendar control.
4. Enter the **Question** for the poll in the text field.
5. Enter Answer options in the **Answer** text field. Add more Answer options by clicking **Add Answer**.

Tip Remove Answer options by clicking the **Delete** icon.

6. Change the order of the Answer options by using the **up** and **down** arrows.
7. Click the **Next** button.

8. Select which offices will be able to vote. Check the **Office All** checkbox ☑ if all offices will have access or select specific offices by using the **Add** and **Remove** buttons.
9. Select the **Member Type** that will have access to the event by using the radio buttons.
10. Select which specific users will have access to the event. Check the **Member All** checkbox if all users will have access or select specific users by using the **Add** and **Remove** buttons.
11. Click the **Save** button to save your changes or Cancel.

Editing a Vote On It Poll

1. In the Navigation menu, click **Communications**. In the Vote On It submenu, click **Manage**.
2. Click the **Edit** icon for the desired poll.

Tip If the desired poll is not listed, use the radio buttons to search for All, Active or Inactive polls.

3. Click the **Edit** button.
4. Edit the poll as desired.
5. Click the **Save** button to save your changes or Cancel.

Vote On It Results

1. To view poll results, click **Communications** in the Navigation menu. In the Vote On It submenu, click **Manage**.
2. Click the **Edit** icon for the desired poll.
3. Click the **Results** tab.

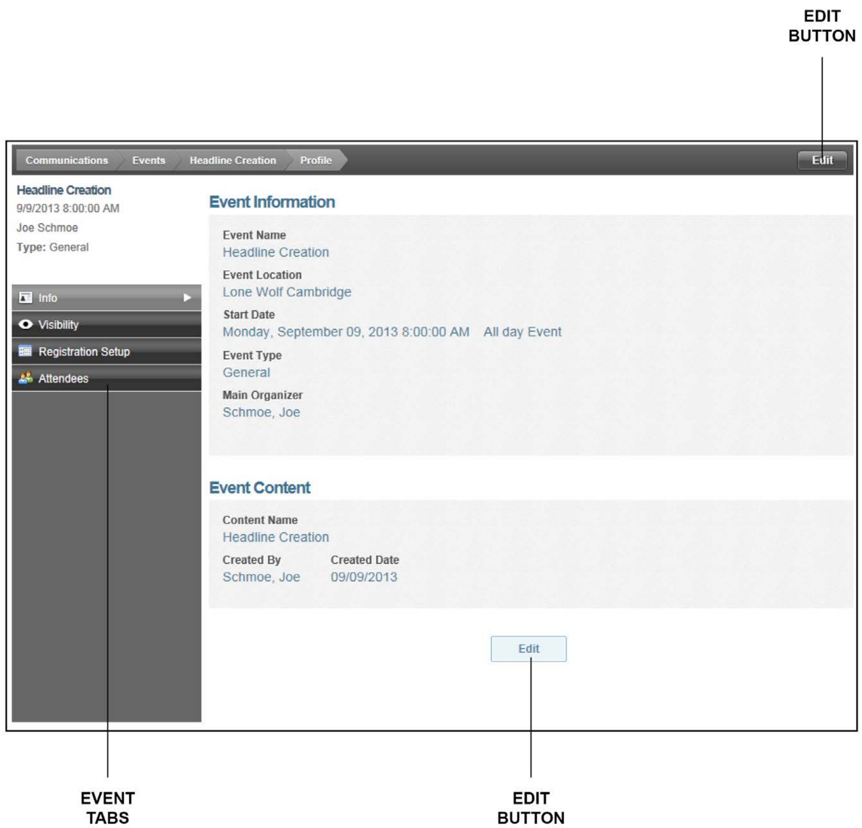
COMMUNICATIONS

MEMBERSHIP | FINANCIAL | CONT

- CONTENT
- **EVENTS**
- MESSAGING

Events

The Events function allows users from both ends of the user spectrum to create and manage events which can be displayed in the Calendar, WIGO and the Events Widget.

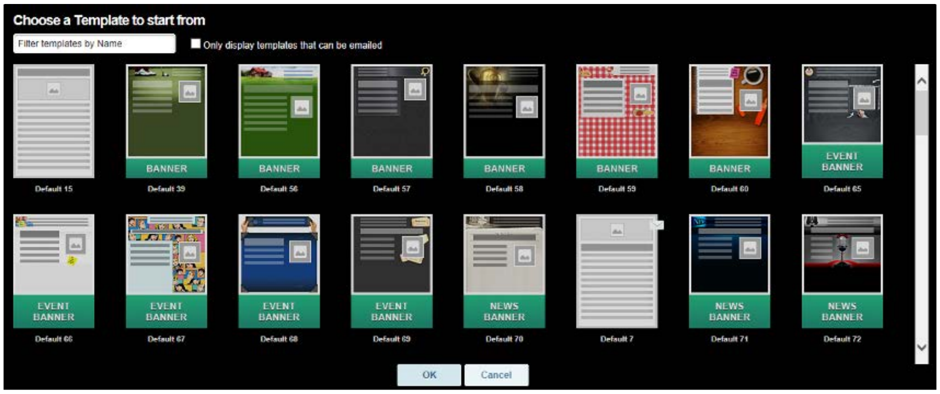


Event Information Window

Create an Event

1. In the Navigation menu, click **Communications**. In the Events submenu, click **Add**.
2. Enter the event name in the **Event Name** text field.
3. Enter the event location in the **Event Location** text field.
4. Enter the **Start Date** and **End Date** by typing in the text fields or using the calendar control.
5. Enter a start time and end time by using the drop-down menu or if time is not applicable, check the **All Day Event** checkbox ☑.
6. If the event is recurring, check the **Recurring Event** checkbox.
7. Select the event type from the **Event Type** drop-down menu.
8. Select the event organizer from the **Main Organizer** drop-down menu. If required, additional organizers can be added to the event by clicking the **Add Contact** button.
9. Click the **Create Event Details** button.

Lone Wolf Real Estate Technologies
T: 1.866.CRY.WOLF(279.9653) • F: 1.519.624.8950 • www.lwolf.com • support@lwolf.com



Template Selection

10. Select a **Template** to use to display your event. Click the **OK** button.
    a. You can filter template by **Name** by using the text field.
    b. You can display only templates that can be emailed by using the checkbox.

Tip If a template which can be emailed is selected, you will have the option to preview the email on the next screen.

11. Enter a name for the content in the **Content Name** text field.
12. Select an image to use with your template by clicking the **Choose Image** button.
13. Click the **Browse** button, select an image and click **Open**.
14. Resize the image by clicking and dragging the image frame, using the Image Preview as a guide.
15. Click the **Save** button to save your changes or Cancel.
16. Enter a **Headline** and **Body** for your event by clicking the **Edit** buttons.
17. Click the **Save** button to save your changes or Cancel.

Visibility

Editing visibility settings allows customization of who can view or register for an event.

1. In the Navigation menu, click **Communications**. In the Events submenu, click **Manage**.
2. Click the **Event** you wish to edit.
3. Click the **Visibility** tab.
4. Click the **Edit** button.
5. Enter the date on which the event will be visible to users by typing in the **Make Visible On** text fields or using the calendar control. Select the time the event will be visible by typing in the next field or using the drop-down menu.
6. Select which offices will be able to view the event. Check the **Office All** checkbox ☑ if all offices will have access or select specific offices by using the **Add** and **Remove** buttons.
7. Select the **Member Type** that will have access to the event by using the radio buttons.
8. Select which specific users will have access to the event. Check the **Member All** checkbox if all users will have access or select specific users by using the **Add** and **Remove** buttons.
9. Click the **Save** button to save your changes or Cancel.

Registration Setup

1. In the Navigation menu, click **Communications**. In the Events submenu, click **Manage**.
2. Click the **Event** you wish to edit.
3. Click the **Registration Setup** tab.
4. Click the **Edit** button.
5. Check the **Require Registration** checkbox ☑.
6. Enter registration details such as **Max # of Attendees**, **Registration Fee**, **Max # of Guests per Attendee**, etc. using the text fields.
7. Select whether to **Use Visibility settings for Invitees** or **Select Visibility** by using the drop-down menu.
8. Select whether to email the invitation to invitees by using the checkbox.

Invitation

1. Select whether to **Use Event Details** in the invitation by using the checkbox ☑.
2. Enter the date on which the invitation will be sent by typing in the **Send On** text field or using the calendar control.

Invitation Creation

If the Use Event Details option is unchecked, use the Invitation Creation function to create a custom invitation for the event.

1. Click the **Create Invitation** button.
2. Select a **Template** to use for the invitation. Click the **OK** button.
   a. You can filter template by **Name** by using the text field.
   b. You can display only templates that can be emailed by using the checkbox ☑.

Tip If a template which can be emailed is selected, you will have the option to preview the email on the next screen.

3. Enter a name for the content in the **Content Name** text field.
4. Select an image to use with your template by clicking the **Choose Image** button.
5. Click the **Browse** button, select an image and click **Open**.
6. Resize the image by clicking and dragging the image frame, using the Image Preview as a guide.
7. Click the **Save** button to save your changes or Cancel.
8. Enter a **Headline** and **Body** for your event by clicking the **Edit** buttons.
9. Click the **Save** button to save your changes or Cancel.

Tip The option to copy existing invitations is also available. To do this, click the **Copy Existing Invitation** button, select the content to copy and click the **OK** button.

Notification

Notifications can be sent to attendees and organizers upon registration. Use the checkboxes to set the notification options.

Reminders

Multiple reminders can be created for events to ensure that registered attendees are never caught off-guard.

1. Click the **Add Reminder** button.
2. Select the specific groups to be sent reminders from the **Send To** drop-down menu.
3. Click the **Reminder** button.
4. The default template will be the template used for the invitation. Enter a name for the content in the **Content Name** text field.
5. Enter a **Headline** and **Body** for your reminder by clicking the **Edit** buttons.
6. Click the **Save** button to save your changes or Cancel.

Tip The option to copy existing invitations is also available. To do this, click the **Copy Existing Invitation** button, select the content to copy and click the **OK** button.

7. Enter the date on which the reminder will be sent by typing in the **Send On** text field or using the calendar control.

Tip Multiple reminders for multiple dates can be created by clicking the **Add a Reminder** button.

8. Click the **Save** button to save your changes or Cancel.

Attendees

The Attendees tab is used when registration is required for the event.

1. Click **All**, **Registered** or **Unregistered** to view attendees depending on the settings selected in the Visibility and Registration Setup tabs.

   All – Displays all users within the offices selected in the Visibility tab.
   Registered – Displays only users who have registered for the event.
   Unregistered – Displays only users who have not registered for the event.

2. Click the **Edit** button.
3. Select the **Attended** checkbox ☑ for each Registered Invitee who attended the event.
4. Click the **Save** button to save your changes or Cancel.

Printing Attendee List

1. Click the **Print Attendees** button to print a list of registered attendees.

Force Registration

1. Click the **Edit** button. This will allow you to register and unregister users for an event.
2. To register a user, in the row containing each user click **Register**.
3. A window will appear containing the event details. Click the **Register** button.

Tip To unregister a user, in the row containing each user click **Unregister** and confirm by clicking the **OK** button.

Closing Out Events

Closing Out an event will close the event to further registration, remove the event from the events and if applicable, post event expenses to brokerWOLF.

Tip Your company must have access to brokerWOLF to take advantage of the Post Expenses function of WOLFconnect.

1. In the Navigation menu, click **Communications**. In the Events submenu, click **Manage**.
2. Click the **Event** you wish to edit.
3. Click the **Attendees** tab.
4. Confirm that all Invitees who attended this event are selected using the **Attended** checkbox ☑.

Tip Confirm Attendee records are accurate before proceeding to the next step.

5. Click the **Close Out Event** button.

Print Reports

1. Click the **Print Report** button. This will display a .PDF report of the attendees, their office, registration date, etc.

Post Expenses

The Post Expenses function allows automatic recording of event expenses in brokerWOLF.

1. Click the **Post Expenses** button.
2. A prompt will appear confirming posting. Click **OK** to confirm or Cancel.

Posted Event Expenses will appear in brokerWOLF in 8.4.2 – Post Group Expenses.

1. In brokerWOLF, navigate to **8.4.2 – Post Group Expenses**.
2. Click the **Import** button.
3. Click the **Connect** button.
4. Click the **Look-Up** icon 🔍.
5. Select the charge code. Click the **OK** button.
6. Select the **Expense Sheet** to post the expenses to from the drop-down menu.
7. Click the **OK** button.

COMMUNICATIONS

MEMBERSHIP | FINANCIAL | CONT

CONTENT
EVENTS
MESSAGING

LONE WOLF WOLFconnect

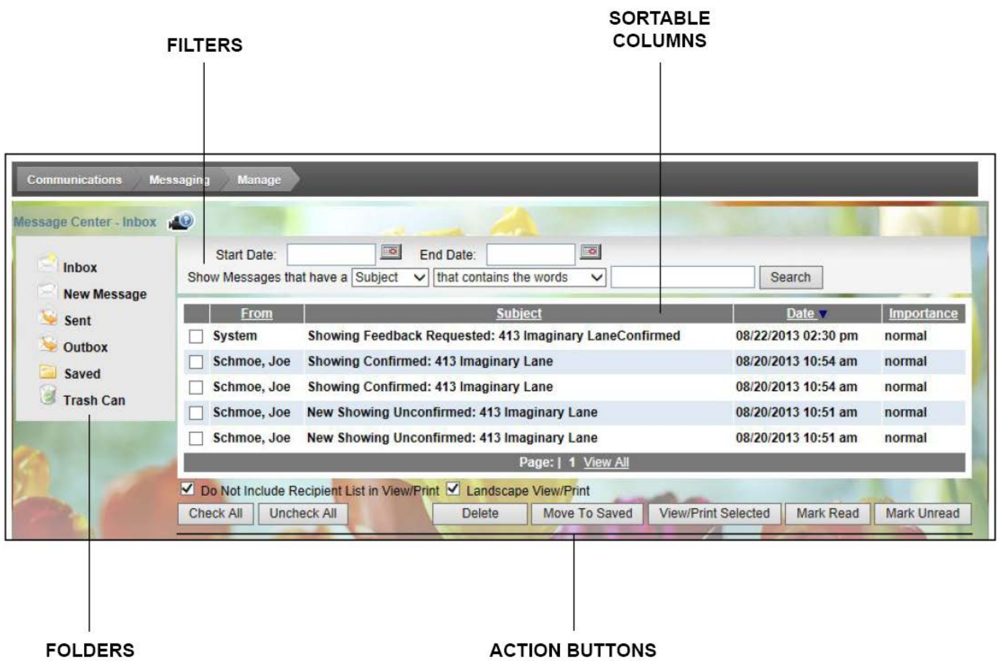
Messaging

Message Center

The Message Center contains all sent and received messages and Showing and Lead notifications.

Tip Depending on your permission level, you may also be able to access messages for other Agents/Staff.

1. To open the Message Center, click **Communications** in the Navigation menu. In the Messaging submenu, click **Manage**.



Message Center

Folders

- Inbox - The Inbox contains all received messages and is displayed by default upon entering the Message Center
- Sent - The Sent folder displays all messages sent from the user
- Outbox - The Outbox folder contains messages that have been saved to be sent later
- Saved - The Saved folder contains messages saved using the **Move to Saved** button
- Trash Can - The Trash Can contains messages marked for deletion that are deleted one year after being placed in the Trash Can

Message Details

Clicking each message will display additional details for that message including:

- Importance
- Sent Date and Time
- Read Date and Time
- Full Message
- Attachments

Tip Occasionally messages sent using Message Center will use the same To and From email addresses; in instances like these, the From email address will be changed to the Administrative Contact Email address entered in the Company Profile. If the From address matches the Administrative Contact Email address a generic email address will be assigned (eg. wolfconnect@lwolf.com).

Only the user sending the message will see this change. All recipients will see the email address of the user who sent the message.

See the Company Profile section for more detail.

Create a Message

To create a message in WOLFconnect to send to other users:

1. In the Navigation menu, click **Communications**. In the Messaging submenu, click **Create Message**.

or

1. Press the **F2** key on your keyboard.
2. Select whether to send to **Agent/Staff**, **Business Contacts** or **Client Contacts** using the radio button.
3. Select specific users to receive the message using the **Selection List**. Type into the text field or select a user and click the **Add** button to add them to the **Recipient List**.

Tip Distribution Lists can be selected here as well. WOLFconnect comes pre-loaded with Distribution Lists such as All Agents, All Staff, etc. See the Creating Distribution Lists section for more details.

4. Hold the **Ctrl** key to select multiple users or hold the **Shift** key and select the last user on the list to select the entire list.

Tip Pay particular attention to the Character Count. Most mobile devices have a maximum character count for text messages. This will apply to users receiving WOLFconnect messages through text messaging. See the Message Forwarding section for more detail.

5. Enter a subject for the message by typing in the **Subject** text field.

Tip If the Subject is left blank, WOLFconnect will display the first 50 characters of the message body in the Subject line.

6. Select the importance of the message by using the **Importance** drop-down menu.

Tip Click the **External Agent Info** button to send your message to an external agent.

7. Select whether to use HTML formatting for the message by selecting the **Use HTML** checkbox ☑. This will reveal more formatting options.
8. Type your message.
9. Click the **Send** button. The window will remain open to send multiple messages.

Message Options

Send Later – Sends the message at a specific date and time.

Spell Check – Checks the spelling of the message body.

Reset – Resets the content of the subject line and message body.

Broadcast – Copies the message to the recipient's email and ignores all other settings.

Copy Email – Copies the message to the recipient's email and all other addresses configured in their User Profile.

Copy Pager – Copies the message to the recipient's email and the first pager address entered in their User Profile.

Display on Login – Activate a popup to notify the recipient of a new message that will appear upon their next login to WOLFconnect.

Confidential – Mark the message as confidential.

Attachments

1. Select the **Attachments** checkbox ☑.
2. Click the **Browse** button. Select the file to be attached and click the **Open** button.

Adding Message Providers

Message providers must be added to take advantage of the Message Forwarding options provided by WOLFconnect. Added Message Providers will appear on the Messaging tab within Agent profiles and can be selected when configuring Message Forwarding for Agents.

Tip Note that SNPP providers are managed by Lone Wolf.

1. In the Navigation menu, click **Communications**. In the Messaging submenu, mouse-over the **Settings** icon and click **Mobile Service Provider**.
2. Click the **Add Entry** button.
3. Enter a name for the provider in the **Provider Name** text field. Be as descriptive as possible in the case of multiple entries for one provider.
4. Enter the address extension in the **Address Extension** text field. For example, for the email address user@lwolf.com, the Address Extension would be “lwolf.com”.
5. Enter the maximum number of characters permitted in the message subject in the **Subject Max Char** text field.
6. Select if additional subject characters will **Carry Into Body** of the message or **Cut Off**.

7. Enter the maximum number of characters permitted in the message body in the **Max Char** text field.
8. Select if additional body characters will **Split** into another the message or **Cut Off**.
9. Click the **Save** button to save your changes or Cancel.

Messaging Setup

Tip It is critical that Messaging options are configured. These settings are integral to out-of-office messaging, automatic showing notifications and intra-office communication.

1. In the Navigation menu, click **Membership**. In the Agent/Staff submenu, click **Manage**.
2. Search for the particular Agent you wish to edit and click the profile.
3. Click the **Messaging** tab.
4. To Add a messaging option, click the **Add** button.
5. Select the type of message between **Email**, **Text** and **Mobile** (SMS/SNPP/TAP).

Tip The first Message option will be set as primary and must be an email address. If WOLFconnect is integrated with brokerWOLF, the email address on file in brokerWOLF will automatically be designated as the primary address for Agents.

6. Enter the email address or phone number in the **Address** field.
   a. If you selected **Text** or **Mobile**, choose a **Provider** from the drop-down menu.
   b. If you selected **Email**, select the format of the message between **Full HTML**, **Simple HTML** and **Text**.
7. If desired, select the option to pause messaging for this address.
8. Click the **Save** button to save your changes or Cancel.

Tip The Agent's primary email address is indicated by the Profile icon.

Notification Selection

Once all messaging options are entered for an Agent, select which addresses will receive which notifications.

Individual notifications are listed on the left side of the page. Below each messaging address there are toggles to enable each notification for that messaging address.

Tip See the Notification Descriptions section for more detail.

Red – No notification will be sent to this messaging address
Green – Notification will be sent to this messaging address

1. Click on each **toggle** to enable or disable that notification or click **Toggle All** to enable or disable all notifications for that messaging address.
2. Click the **Save** button to save your changes or Cancel.

Notification Format

The format of notifications can be selected between Full HTML, Simple HTML and Text depending on the message type.

Full HTML includes all photos and hyperlinks, Simple HTML removes photos but includes hyperlinks and Text only provides the body of the message in plain text format.

1. Click the **Email** icon for the desired address.
2. Select the format between Full HTML, Simple HTML or Text using the radio buttons.
3. Click the **Save** button to save your changes or Cancel.

Tip It is recommended that addresses receiving Feedback Received notifications be configured to receive Full HTML messages to ensure proper delivery of Showing Agent feedback.

Message Forwarding

The Message Forwarding function allows Agents to forward notifications to another messaging address in their absence.

1. Enable Message Forwarding by checking the **Forward** checkbox.
2. Click the **Add** button below the Forward checkbox.
3. Select an address from a list of Agents and Staff or add another address. Click **Continue**.

   a. To select from Agents/Staff, click the **Forward To** text field and begin typing a name or click the arrow to select from drop-down list.
   b. Select the messaging option for that Agent/Staff from the drop-down menu.
   c. Select a date to begin forwarding by entering a date into the **From** text field or click the calendar control.
   d. If applicable, select a date to end forwarding by entering a date into the **To** text field or click the calendar control.
   e. If desired, select the option to mirror all currently selecting notifications for the entered address.
   f. Click the **Save** button to save your changes or Cancel.

   or

   a. To add your own address, select the type of message between **Email**, **Text** and **Mobile** (SMS/SNPP/TAP).
   b. Enter the email address or phone number in the **Address** field.
      i. If you selected **Text** or **Mobile**, choose a **Provider** from the drop-down menu.
      ii. If you selected **Email**, select the format of the message between **Full HTML**, **Simple HTML** and **Text**.
   c. If desired, select the option to mirror all currently selecting notifications for the entered address.

Pause Messaging

WOLFconnect has the ability to pause messaging for each messaging option.

1. Enter the **Messaging** tab for a specific Agent.
2. Select the specific messaging option by clicking the **Email** or **Mobile** icon.
3. Enable or disable message pause by checking the **Pause messaging for this address** checkbox.
4. Save your changes by clicking the **Save** button or Cancel.

Messaging Settings

1. To access Messaging Settings, click **Communications** in the Navigation menu. In the Messaging submenu, mouse-over the **Settings** icon and click **Messaging**.

Send Message Options

- Filter Options – This setting controls how the Selection List is filtered when typing in the Create Message window
- Filter Users – This setting controls the default view of the Selection List.
- Maximum Unfiltered Recipient/In Out List – This setting controls the maximum number of users that will display in the Selection List and in the In/Out Board by default until search information is entered.
- Show In/Out Board – This setting controls the default display of the In/Out Board when creating a message.

Tip See the In/Out Board section for more detail.

- Include List Name in Message Subject – This setting controls if the Distribution List name will appear in the message subject.
- Include Office/Company Name – This setting controls if the From field will display the Office/Company name.
- Include Picture in Message – This setting controls if the user's profile picture will display in the message.

Message Center Search Options

- Filter Options – This setting controls the default filter option when searching for messages based on subject or message body content.

WebMail

For more detail regarding WebMail settings, see the Email section.

Distribution Lists

Creating a Distribution List

1. In the Navigation menu, click **Communications**. In the Messaging submenu, mouse-over the **Settings** icon and click **Distribution List**.
2. Click the **Add Entry** button.
3. Select the **Authorized Sender** from the drop-down menu.
4. Enter a name for the Distribution List in the **List Name** text field.
5. Select specific users and offices to add to the Distribution List. Type into the text field or select a user or office and click the **Add** button to add them to the Distribution List.
6. Click the **Save** button to save your changes or Cancel.

Edit a Distribution List

1. In the Navigation menu, click **Communications**. In the Messaging submenu, mouse-over the **Settings** icon and click **Distribution List**.
2. Click the desired **Distribution List**.
3. Edit the Distribution List as desired.
4. Click the **Save** button to save your changes or Cancel.

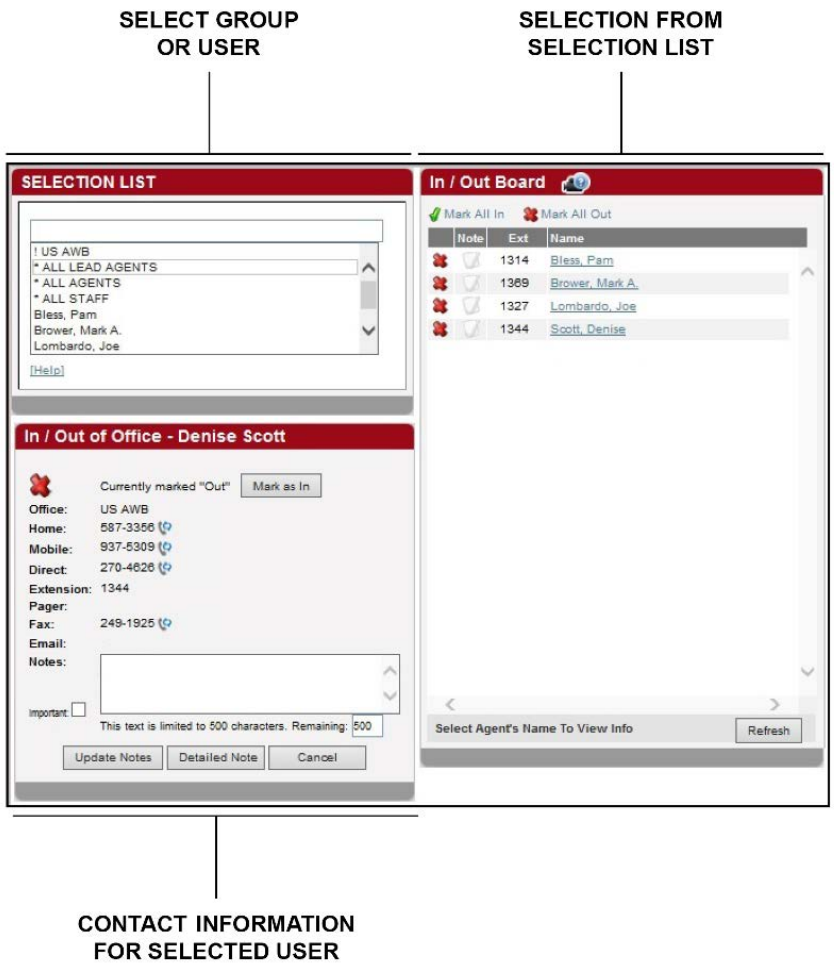
Delete a Distribution List

1. In the Navigation menu, click **Communications**. In the Messaging submenu, mouse-over the **Settings** icon and click **Distribution List**.
2. Click the desired **Distribution List**.
3. Click the **Delete** button.
4. A prompt will appear confirming deletion. Click the **OK** button to confirm or Cancel.

In/Out Board

Accessing the In/Out Board

1. In the Navigation menu, click **Communications**. In the Messaging submenu, click **In/Out Board**.



In/Out Board Window

2. Select a User or User Group from the **Selection List**.
3. Click a specific **User** in the In/Out Board frame.
4. View contact information for that User.

In/Out Board Settings

1. In the Navigation menu, click **Communications**. In the Messaging submenu, mouse-over the **Settings** icon and click **In/Out Board**.
2. Select if a prompt for In/Out Board status will appear on login using the drop-down menu.
3. Select if the In/Out Board will display Team Members using the drop-down menu.
4. Click the **Save** button to save your changes or Cancel.

Notification Descriptions

Tip See the Agent Messaging Setup section for more detail on Notifications.

Messaging

Normal – Sent to Agent when a message flagged as Normal is received

Important – Sent to Agent when a message flagged as Important is received

Tip See the Messaging section for more detail.

WIGO

WIGO Reminders – Sent to Agent when WIGO items are approaching

Tip See the Calendar and WIGO section for more detail.

Showings

New - Listing Agent – Sent to Listing Agent when a new Showing is created for a Listing belonging to that Agent

New - Showing Agent – Sent to designated Showing Agent when a new Showing is created

New - Listing Agent to Confirm – Sent to Listing Agent when a new Showing is created for a Listing belonging to that Agent and Showings require confirmation

Confirmed - Listing Agent – Sent to Listing Agent when a Showing on a Listing belonging to that Agent is confirmed

Confirmed - Showing Agent – Sent to designated Showing Agent when a Showing is confirmed

Cancelled - Listing Agent – Sent to Listing Agent when a Showing is cancelled for a Listing belonging to that Agent

Cancelled - Showing Agent – Sent to designated Showing Agent when a Showing is cancelled

Feedback Received - Listing Agent – Sent to Listing Agent when a Showing Agent sends feedback

Time Changed - Listing Agent – Sent to Listing Agent when a Showing on a Listing belonging to that Agent has a time change

Time Changed - Showing Agent – Sent to designated Showing Agent when a Showing has a time change

Feedback Reminder - Listing Agent – Sent to Listing Agent when a feedback reminder has been sent to the Showing Agent

Feedback Reminder - Showing Agent – Sent to designated Showing Agent as a feedback reminder

Status Change - Listing Agent – Sent to Listing Agent when a Showing on a Listing belonging to that Agent has a Showing Status change

Status Change - Showing Agent – Sent to designated Showing Agent when a Showing Status changes

Tip See the Showings section for more detail.

Leads/Contacts

Web Form Request – Sent to Agent when a Lead has used a web form on the Agent Website

Lead Assignment – Sent to Agent when a Lead is assigned to them

Copy of Lead/Contact Saved Search – Sent to Agent when a Lead is sent Listings based on a previous search

Property Search Created – Sent to Agent when a Lead receives an email containing Listings matching their search parameters

Tip See the Leads and Contacts section for more detail.

Event Messages

Event Reminders – Sent to Agent when Events are approaching

Tip See the Events section for more detail.

Haves and Wants

Haves and Wants – Sent to Agent when a Have or Want is created

Expiring Haves and Wants – Sent to Agent when a Have or Want Posting Length is expiring

Tip See the Haves and Wants section for more detail.

loadingDOCS

Document Overdue – Sent to Agent when a Document attached to a loadingDOCS Transaction or Task is overdue

Document Complete – Sent to Agent when a Document attached to a loadingDOCS Transaction or Task is flagged as complete

Document Incomplete – Sent to Agent when a Document attached to a loadingDOCS Transaction or Task is flagged as incomplete

Tip See the loadingDOCS section for more detail.

movingWOLF

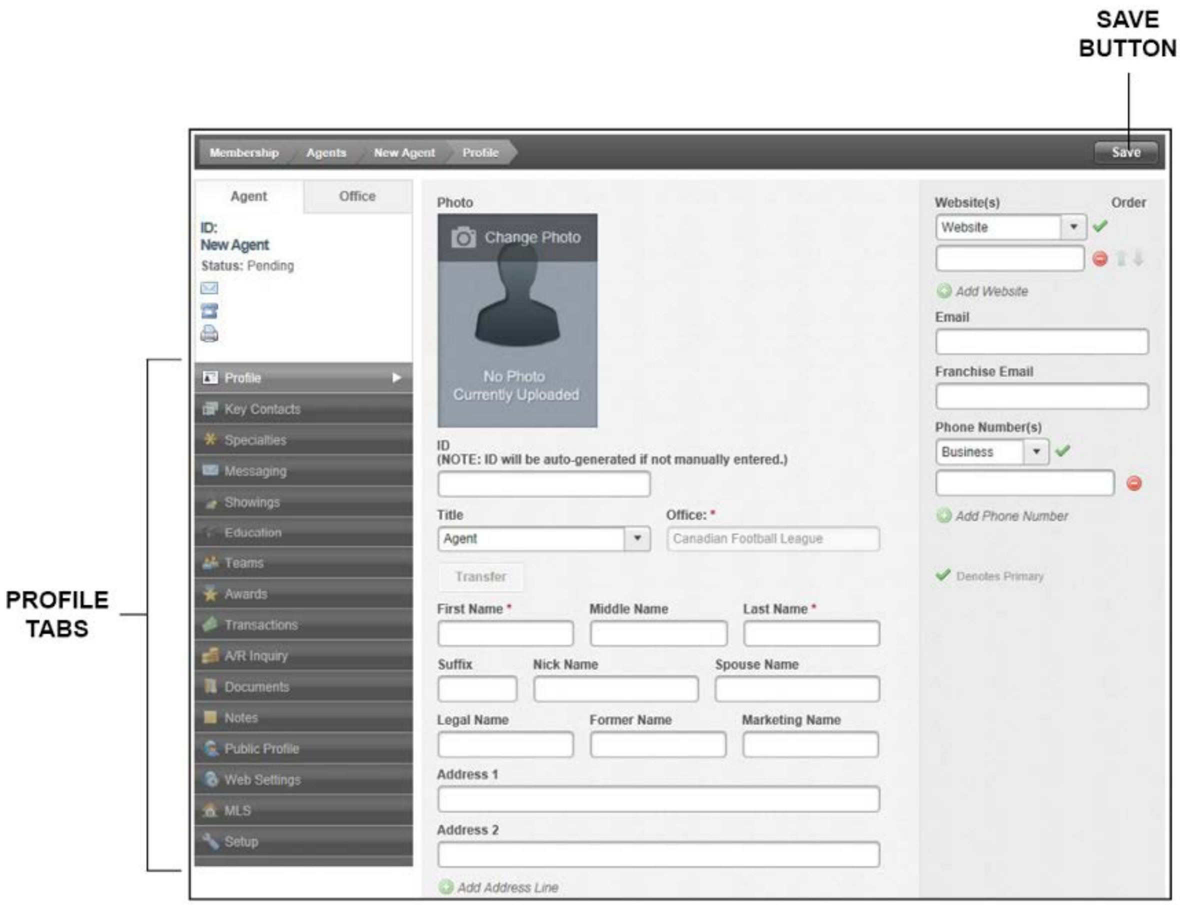
movingWOLF Reminders – Sent to Agent to notify of missing Buyer/Seller information after a brokerWOLF Trade sync

MEMBERSHIP

FINANCIAL | CONTACT MANAGEMENT |

LONE WOLF WOLFconnect

Adding and Managing Agents/Staff



Edit User Profile

Agent/Staff Profiles contain detailed information on each Agent/Staff Member including Contact Information, Personal Information, Education and Awards.

In order to use WOLFconnect to its full capability, it is recommended to keep Agent/Staff Profiles accurate and updated regularly.

Tip Give Agents/Staff permission to edit their Profile. This will reduce administrative work and give Agents/Staff an opportunity to become familiar with the WOLFconnect platform.

Adding a New Agent/Staff

1. In the Navigation menu, click **Membership**. In the Agent/Staff submenu, click **Add**.
2. Click the **Add Agent** or **Add Staff** button.
3. Select the **Office** to which the Agent/Staff will be added by typing in the text field or clicking the **Look-Up i**con .
4. Click the **Select** button.
5. Populate the Profile page with information about the Agent/Staff. Required fields are indicated by a red asterisk *.

Tip Be as detailed as possible when entering Profile information. You will be unable to navigate to other information tabs before finalizing initial Profile data entry.

First Name and Last Name are required fields. Franchise Start Date is a required field for Agents while Office Start Date is a required field for Staff.

Tip A username will automatically be generated if the Generate Username button is not clicked.

Login Information

6. To generate a username for the new Agent/Staff, click the **Generate Username** button.
7. Select a **User Role** for the new Agent from the drop-down menu.
8. Click the **Save** button to save your changes or Cancel.

Welcome Email

Upon saving, a Welcome Email will be sent to the email address entered in the Agent/Staff Profile.

Tip See the Getting Started section for more detail.

Profile Tabs

Profile tabs allow more detailed information about Agents and Staff to be entered into WOLFconnect.

Tip Staff Profiles only have access to the Teams, Note, Messaging and Specialties tabs.

Key Contacts Tab

The Key Contacts tab is used to record contact information for specific requests. Default requests are General Contact, Accounting, Administration, Listings and Transactions. Agents can designate contacts for each request or use the General Contact information for all requests.

1. Select the Agent, Office, Region or Franchise by typing in the text field or clicking the **Look-Up** icon .
2. To add a new Contact, click the **Add Key Contact** button.
3. Select a request from the **Contact For** drop-down menu.

Tip At any time you can select the **Use General** checkbox ☑ to automatically populate the general contact information for the User.

4. Select the Agent by typing in the **Name** text field or clicking the **Look-Up** icon. Clear the Name field by clicking the **Clear** icon .

Tip Select the Manual Entry checkbox ☑ to have access to all text fields.

5. If desired, enter a **Title** for the Agent in the Title text field.
6. Click the **Save** button to save your changes or Cancel.

Tip Edit a Key Contact by clicking the Edit icon .

Specialties Tab

The Specialties tab contains information on the Agent/Staff's particular skillset. Does the Agent/Staff Member specialize in commercial or residential real estate? What are the Agent's hobbies or what civil activities are they involved in?

1. To Edit the Specialties information, click the **Edit** button.
2. Select an Area Code from the list of **Available Service Area Codes** and click the **Add** button to add that Area Code to the Selected Service Area Codes. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
3. Select a Specialty from the **Area of Specialization** drop-down menu. Select specific Specialties based on the selected Area of Specialization.
4. Select Hobbies from the list of **Available Hobbies** and click the **Add** button to add that hobby to the Selected Hobbies. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
5. Select Civil Activities from the list of **Available Activities** and click the **Add** button to add that activity to the Selected Activities. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
6. Click the **Save** button to save your changes or Cancel.

Messaging Tab

The Messaging tab allows the Agent to set messaging options for the Agent/Staff.

Tip See the Messaging section for more detail.

Showings Tab

The Showings tab allows the Agent to send Showing Feedback Requests to clients.

1. Enable or disable **Showing Feedback Reminders** from the drop-down menu.
2. Select the maximum amount of **Daily Showing Feedback Reminders** from the drop-down menu.
3. Format the **Feedback Request** using the editor.
4. Click the **Save** button to save your changes or Cancel.

Education Tab

The Education tab displays information about the Agent's educational background.

1. Click the **Add Designation** button to add a professional designation to the Agent Profile.
   a. Select the **Name** from the drop-down menu.
   b. Select the **Start Date** and **Inactive Date** (if applicable) using the calendar control.
   c. Click the **Save** icon to save your changes or Cancel .

Tip For information on Training Courses, see the Training Courses section.

2. Click the **Add Education** button to add an education institution to the Agent Profile.
   a. Enter the **School** and **Certificate** using the text fields.
   b. Select the **Graduation Date** using the calendar control.
   c. Click the **Save** icon to save your changes or Cancel.
3. Select the **First Year Licensed** from the drop-down menu and click the **Save** icon.
   a. Click the **Add License button** to add a license to the Agent profile.
   b. Select the **License Type** from the drop-down menu.
   c. Enter the **Number** and **Year Issued** in the text fields.
   d. Select the **Expiry Date** using the calendar control.
   e. Select the **Country** from the drop-down menu. Select the **Province/State** from the drop-down menu.
   f. Click the **Save** icon to save your changes or Cancel.

Teams Tab

The Teams tab allows the addition of other users to the Agent/Staff Member's team.

1. Click the **Add Team Member** button .
2. Select the desired user to be added to the Team by typing in the text field or clicking the **Look-Up** icon .
3. Select the **Start Date** and **Inactive Date** (if applicable) using the calendar control.
4. Click the **Save** icon to save your changes or Cancel .

Once a Team member is added the Agent/Staff Member's status will change from Individual to Team Leader.

Awards Tab

The Awards tab is Read-Only for the Agent user role and is used to track information for year-to-date summaries, awards and milestones.

Transactions Tab

The Transactions tab lists all Transactions in which the Agent is involved.

1. Agents are able to search for All, Open, Closed or Fallen transactions.
2. Advanced search options using Transaction #, Street Name, Street Number, Unit, Price, Offer, Close, Firm or Stat are available as well.

Documents Tab

The Documents tab is used to store frequently used files and documents including logos, text files, etc.

1. To store a document on the Document page, click the **Add Document** button.

Tip Required fields are indicated by a red asterisk *.

2. Click the **Browse** button. Select the file to be stored and click the **Open** button.
3. Enter the name of the file in the **Display Name** text field.
4. Enter a description of the file in the **Description** text field.
5. Click the **Upload** button to store the file or Cancel.

Notes Tab

The Notes tab is used to enter notes on users for the purpose of organization within WOLFconnect.

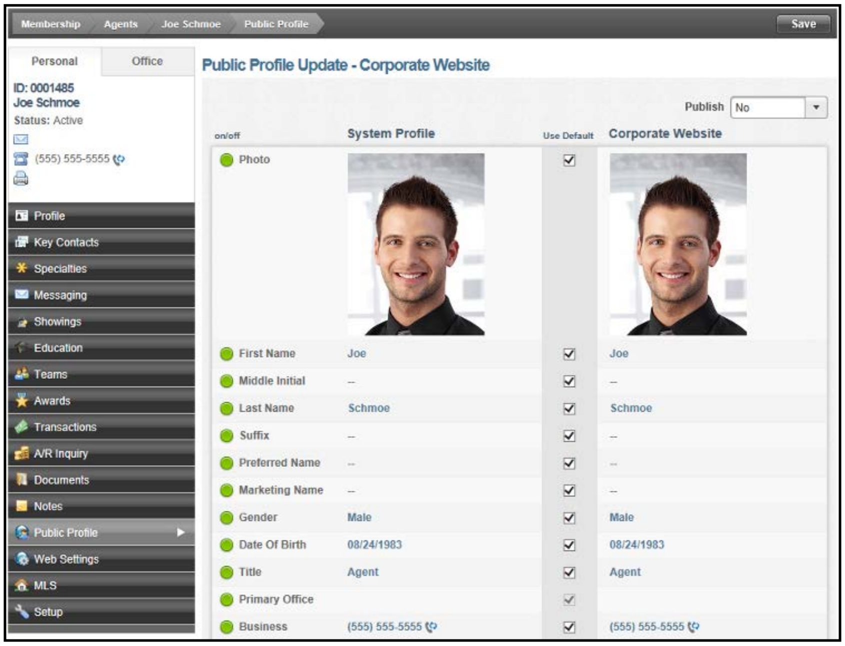
1. To add a Note to a user Profile, click the **Add Note** button.
2. Select the type of Note from the **Type** drop-down menu.
3. Indicate if the note will be private by selecting the **Private** checkbox ☑.

Tip Required fields are indicated by a red asterisk *.

4. Enter the note in the **Note** text field.
5. Click the **Save** button to save your changes or Cancel.

Public Profile Tab

The Public Profile tab allows an Agent to manage their online persona.



Public Profile

1. Click the desired Public Profile.
2. Each category can be enabled or disabled by clicking the **toggle** . Using the toggle will enable or disable that category for both the WOLFconnect Profile and the particular Public Profile.

Tip A category can be enabled in the WOLFconnect Profile but disabled in the Public Profile by deselecting the checkmark ☑ beside the category on the right side of the screen.

3. Publish a Public Profile by selecting Yes in the **Publish** drop-down menu in the top-right of the screen.

Tip Click the **Additional Websites** button to add additional website information to the selected Public Profile.

4. Click the **Save** button to save your changes or Cancel.

Web Settings Tab

The Web Settings tab allows the Agent to set which listings and modules appear on their Agent website if enabled through globalWOLF.

MLS Tab

The MLS tab allows the Agent to enter their MLS ID information to more accurately track listings and assist in transaction tracking.

Adding an Agent Photo

Agent photos can be added to appear within WOLFconnect or on external Office or Agent websites.

Photo Specifications

Photos should adhere to the following parameters to produce the sharpest image:

- Photo should be 140 pixels wide or no more than 216 pixels in height
- File must be .JPG or .GIF format
- Files names cannot contain symbols
- File size must be less than 250 KB

1. To add a photo to the Agent's Profile, click the **Edit** button in the Profile tab.
2. Click the **Change Photo** button.
3. Click the **Browse** button. Select the photo to be used and click the **Open** button.
4. Resize the photo by clicking and dragging the photo frame, using the Image Preview as a guide.
5. Click the **Save** button to save your changes or Cancel.
6. On the Agent Profile page, click the **Save** button to save your changes or Cancel.

Override an Agent Website Photo

To upload a different or new photo to display on an Agent Website or the Office Website Realtor List, follow the instructions below:

1. In the Navigation menu, click **Membership**. In the Agent/Staff submenu, click **Manage**.
2. Search for the particular Agent to edit and click the **Profile**.
3. Click the **Public Profile** tab.
4. Click **globalWOLF Website**.
5. Select the **Override Photo** checkbox ☑.
6. Click the **Change Photo** button.
7. Click the **Browse** button. Select the photo to be used and click the **Open** button.
8. Resize the photo by clicking and dragging the photo frame, using the Image Preview as a guide.
9. Click the **Save** button to save your changes or Cancel.
10. On the globalWOLF Profile page, click the **Save** button to save your changes or Cancel.

Setting Agent Leave of Absence

1. In the Navigation menu, click **Membership**. In the Agent/Staff submenu, click **Manage**.
2. Search for the particular Agent to edit and click the Profile.
3. Click the **Edit** button.
4. Click the **Leave of Absence** button.
5. Enter the **Leave Date** and **Return Date** (if applicable) by typing in the text fields or using the calendar control.
6. If desired, enter a **Reason** in the text field.
7. Click the **Save** button to save your changes or Cancel.

Deactivating an Agent/Staff Member

1. In the Navigation menu, click **Membership**. In the Agent/Staff submenu, click **Manage**.
2. Search for the particular Agent/Staff Member to edit and click the Profile.
3. Click the **Edit** button.
4. Click the **Termination** button.

Tip Required fields are indicated by a red asterisk *.

a. Select a **Termination Date** using the calendar control.
b. Enter a **Reason** in the text field.
c. Select the **Destination** of the terminated Agent by using the drop-down menu.
d. If desired, enter **Notes** regarding the termination in the text field.
e. Click the **Save** button to save your changes or Cancel.
f. A prompt will appear informing of required approval. Click the **OK** button.

or

4. Click the **Leave of Absence** button.

Tip Required fields are indicated by a red asterisk *.

a. Select a **Leave Date** using the calendar control.
b. Select a **Return Date** using the calendar control.
c. Enter a **Reason** in the text field.
d. Click the **Save** button to save your changes or Cancel.
e. A prompt will appear informing of required approval. Click the **OK** button.

Tip Simple deletion of an Agent/Staff Member is available as well by clicking the **Delete** button.

This is not recommended as the Termination function creates a record in WOLFconnect of the reason for termination and exact destination of the terminated Agent.

Resetting an Agent/Staff Password

Tip Only Administrators have permission to reset Agent/Staff passwords by default. See the Granting Access and User Roles section for more detail.

1. In the Navigation menu, click **Membership**. In the Agents/Staff submenu, click **Manage**.
2. Search for the particular Agent to edit and click the Profile.
3. Click the **Edit** button.
4. Click the **Reset Password** button.
5. A prompt will appear confirming password reset. Click the **Yes** button to confirm or No.
6. Click the **OK** button.

The Agent/Staff Member will receive an email asking them to enter a new password.

MEMBERSHIP

LONE WOLF WOLFconnect

MLS Integration

Listings are an integral piece of the WOLFconnect platform. Full use of the feature will allow Agents to keep appraised of new listings; improper use of Listings could result in:

- For an Agent's listings, they will appear as "N/A" in the Listing Agent field
- Agents will see no listings when logging in to WOLFconnect
- The Agent will be unable to access Showing information as they will have no assigned listings
- The Agent will receive no Showing notifications
- Agent listings will not appear on their Agent website

Alleviate these concerns by integrating an MLS ID into an Agent's WOLFconnect profile.

Adding an MLS ID

Tip Adding an MLS ID for Pocket Listings is unnecessary unless you desire Pocket Listings to appear on globalWOLF Agent websites.

1. Click **Membership** in the Navigation menu. In the Agent/Staff submenu, click **Manage**. This will bring you to the Agents/Staff page.
2. Click the **Add Agent** button.
3. Select the Agent by typing in the text field and selecting the Agent once they are displayed. This will display the Profile page.
4. Click the **MLS** tab.
5. Click the **Add Entry** button.
6. Select an **MLS Area** from the drop-down menu.
7. Enter the Agent's MLS ID in the **MLS ID** text field.

Tip Click **Look Up MLS ID** to look up the Agent's specific MLS ID according to the selected MLS Area.

8. Click the **Update** icon to save your changes or Cancel .

Tip Delete an MLS ID from an Agent's profile by clicking the **Delete** icon .

MEMBERSHIP

FINANCIAL | CONTACT MANAGEMENT |

- ADDING AND MANAGING AGENT AND STAFF
- MLS IDS
- **GRANTING ACCESS AND USER ROLES**
- TRAINING COURSES
- ADDING OFFICES
- OFFICE SETUP
- SINGLE SIGN-ON

LONE WOLF WOLFconnect

Granting Access and User Roles

User Roles are where administrators can give permissions to each level of user for WOLFconnect.

Various permissions can be given to each user group allowing a high level of control to be established.

System User Access

1. Mouse-over the **Wrench Settings** icon in the top-right of the screen. Click **System User Access**.

This will display the System User Access page. All existing User Roles will be displayed here.

Adding a User Role

1. On the System User Access page, click the **Add Entry** button.
2. Enter the **Role Name** and if needed, a description.
3. If the role is based on an existing User Role, select the existing User Role from the **Copy Permissions From** drop-down menu.
4. Click the **Save** button to save your changes or Cancel.

Assigning a User Role

Once a User Role is created, individual users must be assigned or unassigned to that role in order to grant access to WOLFconnect.

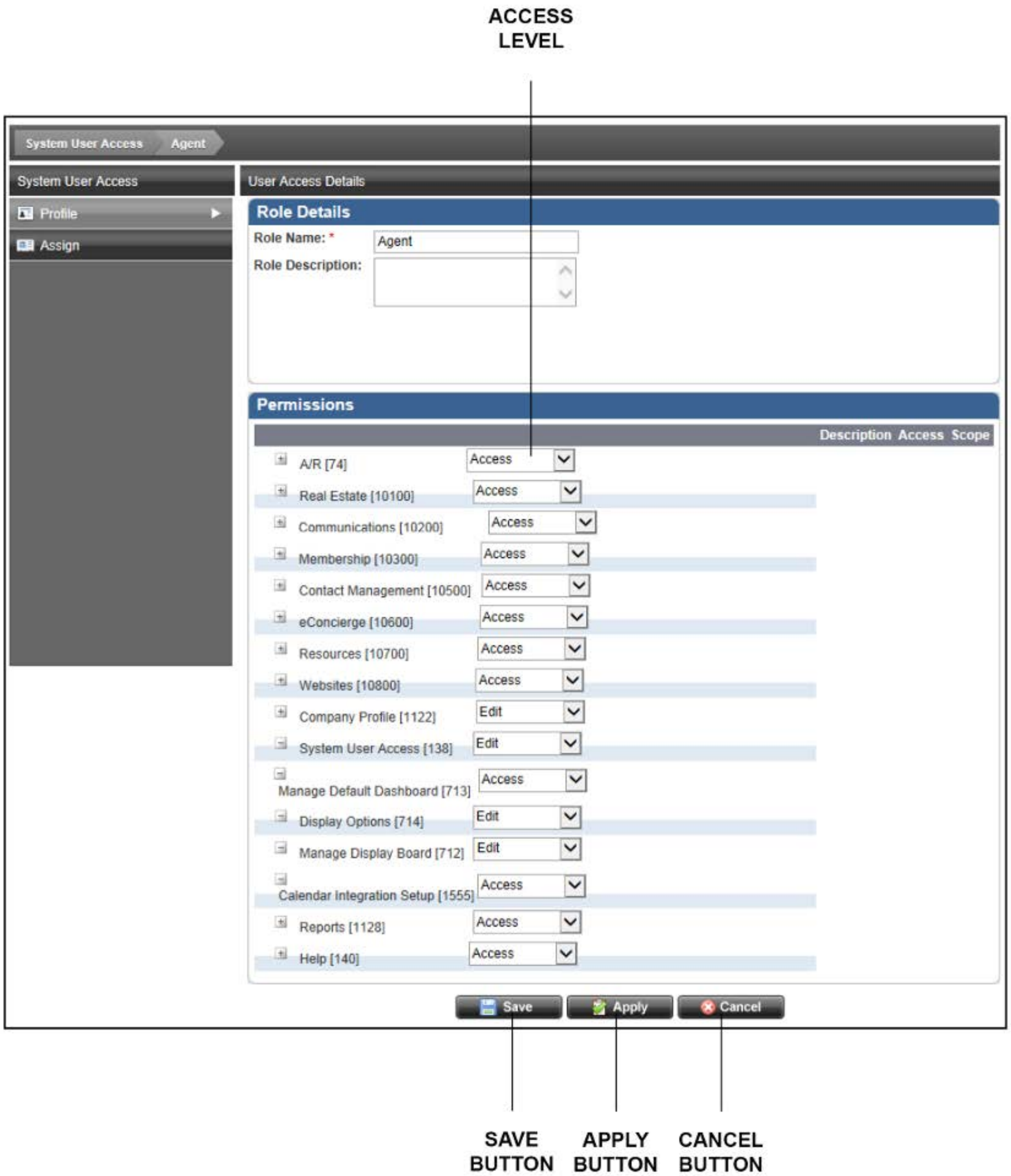
Tip User Role assignment can also be accomplished at initial User Profile creation. See the Adding and Managing Agents/Staff section for more detail.

1. Mouse-over the **Wrench Settings** icon. Click **System User Access**.
2. Click the **Edit** icon for the desired User Role.
3. Click the **Assign** tab.
4. Click the **Edit** button.
5. In the **Office** field, begin typing the name of the Office you wish to choose users from or click the **Look-Up** icon. You can click the Cancel icon to clear the Office field.
6. Select individual users and click the **Add** button to add that user to the User Role. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
7. Click the **Save** button to save your changes or Cancel.

Tip Hold the **CTRL** key to select multiple users.

Editing User Roles

1. Mouse-over the **Wrench Settings** icon . Click **System User Access**.
2. Click the **Edit** icon for the desired User Role.



User Permissions Window

3. Edit details such as the **Role Name** and **Role Description**.
4. Under the **Permissions** heading, each Permission is listed beside a drop-down menu.

    Access – the user is given full access to this site function
    No Access – the user is unable to access this function
    Edit – the user can edit information for this function
    Read-Only – the user is able to access the function but is unable to edit any information

5. Some Permissions can be expanded. Click the **Expand** icon to access details for the particular Permission.
6. For some Permissions, the **Scope** can be chosen from a drop-down menu.

    All Offices – The permission applies to All Offices.
    My Office Data – The permission will apply only to information applicable to the user's office.
    Selected Office – Selecting this option will display a **Look-Up** icon. Click it to choose from a list of offices.
    My Data – The permission will apply only to the user's information only.
    My Team Data – The permission applies only to information applicable to the user's team.
    Selected Teams – Selecting this option display a **Look-Up** icon. Click to choose from a list of teams.

Tip Click the **Add Additional Scope** icon to add additional parameters to the Permission level.

7. Click the **Apply** button to save your changes and continue editing the User Role.

    or

8. Click the **Save** button to save your changes or Cancel.

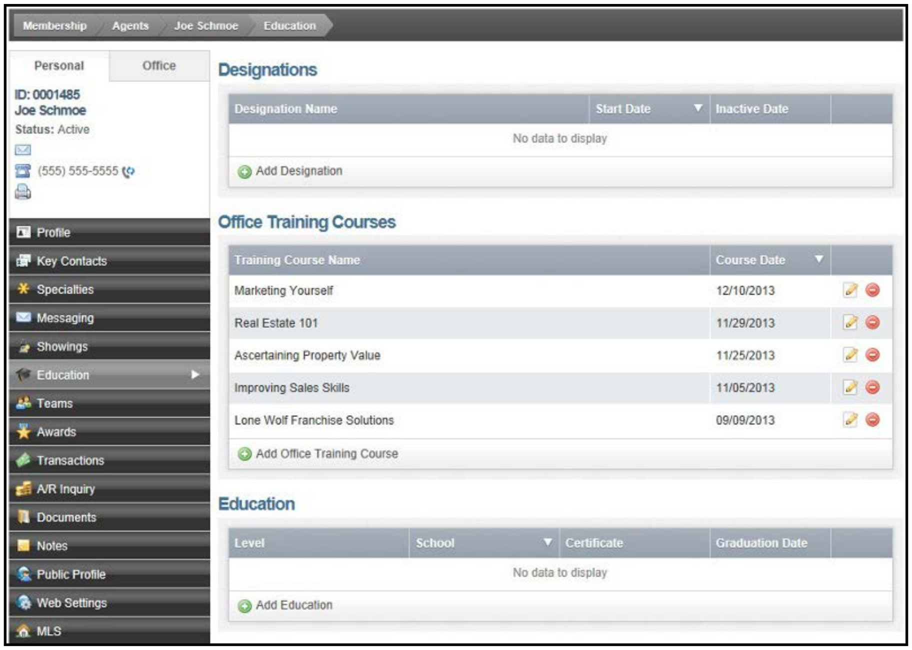
MEMBERSHIP

FINANCIAL | CONTACT MANAGEMENT |

LONE WOLF WOLFconnect

Training Courses

Training Courses can be used to keep track of specific courses, who has taken the course and who still needs to be invited.



Training Courses - WOLFconnect Education Tab

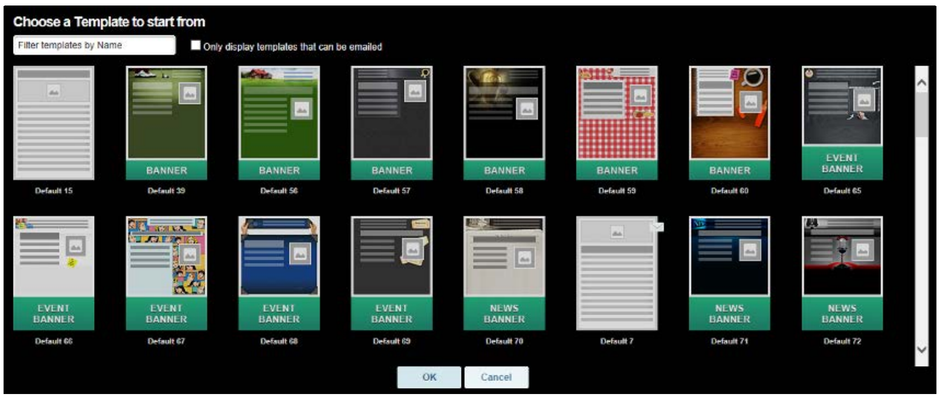
Creating a Training Course

1. In the Navigation menu, click **Membership**. In the Setup submenu, click **Office Training Courses**.
2. Click the desired **Office**. Existing Training Courses specific to that Office will display.
3. Click the **Add Training Course** button.
4. Enter a name for the **Training Course** in the text field.
5. Click the **Save** icon to save your changes or Cancel.

Tip Edit a Training Course by following Steps 1-2 and clicking the **Edit** icon for the desired Training Course. Delete a Training Course by clicking the **Delete** icon for the desired Training Course.

Creating the Training Event

1. In the Navigation menu, click **Communications**. In the Events submenu, click **Add**.
2. Enter the event name in the **Event Name** text field.
3. Enter the event location in the **Event Location** text field.
4. Enter the **Start Date** and **End Date** by typing in the text fields or using the calendar control.
5. Enter a start time and end time by using the drop-down menu or if time is not applicable, check the **All Day Event** checkbox ☑
6. If the event is recurring, check the **Recurring Event** checkbox.
7. Select Training Course from the **Event Type** drop-down menu.
8. Select the specific Training Course from the **Training Course** drop-down menu.
9. Select the event organizer from the **Main Organizer** drop-down menu. If required, additional organizers can be added to the event by clicking the **Add Contact** button.
10. Click the **Create Event Details** button.



Template Selection

11. Select a Template to use to display your event. Click the **OK** button.
    a. You can filter template by **Name** by using the text field.
    b. You can display only templates that can be emailed by using the checkbox.

Tip If a template which can be emailed is selected, you will have the option to preview the email on the next screen.

12. Enter a name for the content in the **Content Name** text field.
13. Select an image to use with your template by clicking the **Choose Image** button.
14. Click the **Browse** button, select an image and click **Open**.
15. Resize the image by clicking and dragging the image frame, using the Image Preview as a guide.
16. Click the **Save** button to save your changes or Cancel.
17. Enter a **Headline** and **Body** for your event by clicking the **Edit** buttons.
18. Click the **Save** button to save your changes or Cancel.

Visibility

Editing visibility settings allows customization of who can view or register for a Training Course.

1. In the Navigation menu, click **Communications**. In the Events submenu, click **Manage**.
2. Click the **Event** you wish to edit.
3. Click the **Visibility** tab.
4. Click the **Edit** button.
5. Enter the date on which the event will be visible to users by typing in the **Make Visible On** text fields or using the calendar control. Select the time the event will be visible by typing in the next field or using the drop-down menu.
6. Select which offices will be able to view the event. Check the **Office All** checkbox ☑ if all offices will have access or select specific offices by using the **Add** and **Remove** buttons.
7. Select the **Member Type** that will have access to the event by using the radio buttons.
8. Select which specific users will have access to the event. Check the **Member All** checkbox if all users will have access or select specific users by using the **Add** and **Remove** buttons.
9. Click the **Save** button to save your changes or Cancel.

Registration Setup

1. In the Navigation menu, click **Communications**. In the Events submenu, click **Manage**.
2. Click the **Event** you wish to edit.
3. Click the **Registration Setup** tab.
4. Click the **Edit** button.
5. Check the **Require Registration** checkbox ☑.
6. Enter registration details such as **Max # of Attendees**, **Registration Fee**, **Max # of Guests per Attendee**, etc. using the text fields.
7. Select whether to **Use Visibility settings for Invitees** or **Select Visibility** by using the drop-down menu.
8. Select whether to email the invitation to invitees by using the checkbox.
9. Select whether to exclude Invitees who have already attended the Training Course.

Tip If this option is selected, invites will not be sent to users with the Training Course recorded in the Education Tab of their WOLFconnect Profile. See the Adding an Agent section for more detail.

Invitation

1. Select whether to **Use Event Details** in the invitation by using the checkbox ☑.
2. Enter the date on which the invitation will be sent by typing in the **Send On** text field or using the calendar control.

Invitation Creation

If the Use Event Details option is unchecked, use the Invitation Creation function to create a custom invitation for the Training Course.

1. Click the **Create Invitation** button.
2. Select a **Template** to use for the invitation. Click the **OK** button.
    a. You can filter template by **Name** by using the text field.
    b. You can display only templates that can be emailed by using the checkbox ☑.

Tip If a template which can be emailed is selected, you will have the option to preview the email on the next screen.

3. Enter a name for the content in the **Content Name** text field.
4. Select an image to use with your template by clicking the **Choose Image** button.
5. Click the **Browse** button, select an image and click **Open**.
6. Resize the image by clicking and dragging the image frame, using the Image Preview as a guide.
7. Click the **Save** button to save your changes or Cancel.
8. Enter a **Headline** and **Body** for your event by clicking the **Edit** buttons.
9. Click the **Save** button to save your changes or Cancel.

Tip The option to copy existing invitations is also available. To do this, click the **Copy Existing Invitation** button, select the content to copy and click the **OK** button.

Notification

Notifications can be sent to attendees and organizers upon registration. Use the checkboxes ☑ to set the notification options.

Reminders

Multiple reminders can be created for Training Courses so registered attendees are sufficiently prepared.

1. Click the **Add Reminder** button.
2. Select the specific groups to be sent reminders from the **Send To** drop-down menu.
3. Click the **Reminder** button.
4. The default template will be the template used for the invitation. Enter a name for the content in the **Content Name** text field.
5. Enter a **Headline** and **Body** for your reminder by clicking the **Edit** buttons.
6. Click the **Save** button to save your changes or Cancel.

Tip The option to copy existing invitations is also available. To do this, click the **Copy Existing Invitation** button, select the content to copy and click the **OK** button.

7. Enter the date on which the reminder will be sent by typing in the **Send On** text field or using the calendar control.

Tip Multiple reminders for multiple dates can be created by clicking the **Add a Reminder** button.

8. Click the **Save** button to save your changes or Cancel.

Attendees

The Attendees tab is used when registration is required for the event.

1. Click **All**, **Registered** or **Unregistered** to view attendees depending on the settings selected in the Visibility and Registration Setup tabs.

   All – Displays all users within the offices selected in the Visibility tab.
   Registered – Displays only users who have registered for the event.
   Unregistered – Displays only users who have not registered for the event.

Printing Attendee List

1. Click the **Print Attendees** button to print a list of registered attendees.

Force Registration

1. Click the **Edit** button. This will allow you to register and unregister users for an event.
2. To register a user, in the row containing each user click **Register**.
3. A window will appear containing the event details. Click the **Register** button.

Tip To unregister a user, in the row containing each user click **Unregister** and confirm by clicking the **OK** button.

Closing Out a Training Event

Closing Out a Training Event will close the event to further registration, remove the event from the events, record any Training Course completions in Agent profiles and if applicable, post event expenses to brokerWOLF.

Tip Your company must have access to brokerWOLF to take advantage of the Post Expenses function of WOLFconnect.

1. In the Navigation menu, click **Communications**. In the Events submenu, click **Manage**.
2. Click the **Event** you wish to edit.
3. Click the **Attendees** tab.
4. Click the **Close Out Event** button.

Print Reports

1. Click the **Print Report** button. This will display a .PDF report of the attendees, their office, registration date, etc.

Post Expenses

The Post Expenses function allows automatic recording of event expenses in brokerWOLF.

1. Click the **Post Expenses** button.
2. A prompt will appear confirming the post. Click the **Yes** button to confirm or No.

Post Event Expenses will appear in brokerWOLF in 8.4.2 - Post Group Expenses.

1. In brokerWOLF, navigate to **8.4.2 - Post Group Expenses**.
2. Click the **Import** button.
3. Click the **Connect** button.
4. Click the **Look-Up** icon .
5. Select the charge code. Click the **OK** button.
6. Select the **Expense Sheet** to post the expenses to from the drop-down menu.
7. Click the **OK** button.

Manually Adding a Training Course to an Agent Profile

1. In the Navigation menu, click **Membership**. In the Agent/Staff submenu, click **Manage**.
2. Search for the particular Agent you wish to edit and click the profile.
3. Click the **Education** tab.
4. Click the **Add Office Training Course** button.
5. Select the **Training Course** from the drop-down menu.
6. Select the **Course Date** using the calendar control.
7. Click the **Save** icon to save your changes or Cancel.

Edit a Training Course in an Agent Profile

1. In the Navigation menu, click **Membership**. In the Agent/Staff submenu, click **Manage**.
2. Search for the particular Agent you wish to edit and click the profile.
3. Click the **Education** tab.
4. Click the **Edit** icon for the desired Training Course.
5. Edit the Training Course as desired.
6. Click the **Save** icon to save your changes or Cancel.

Delete a Training Course in an Agent Profile

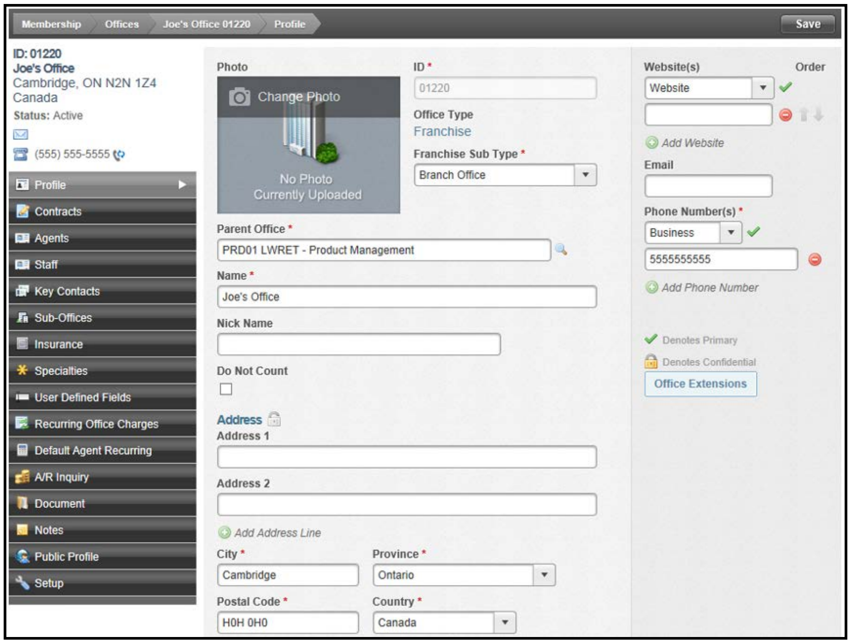
1. In the Navigation menu, click **Membership**. In the Agent/Staff submenu, click **Manage**.
2. Search for the particular Agent you wish to edit and click the profile.
3. Click the **Education** tab.
4. Click the **Delete** icon for the desired Training Course.
5. A prompt will appear confirming deletion. Click the **OK** button to confirm or Cancel.

MEMBERSHIP

FINANCIAL | CONTACT MANAGEMENT |

LONE WOLF WOLFconnect

Adding Offices



Office Profile

The Office Profile contains all relevant information for the Office: Contracts, Key Contacts, Insurance, Specialties and more.

Adding a New Office

1. In the Navigation menu, click **Membership**. In the Office submenu, click **Add**.
2. Click the **Add Office** button.
3. Populate the Profile page with information about the Office. Required fields are indicated by a red asterisk *.

Tip Be as detailed as possible when entering Profile information. You will be unable to navigate to other information tabs before finalizing initial Profile data entry.

Franchise Sub Type, Name, Address Information, Phone Number and Opening Date are required fields.

Tip An ID will automatically be generated upon saving the Office Profile.

4. Click the **Save** button to save your changes or Cancel.
5. A prompt will appear confirming the Office ID. Click the **OK** button.

Profile Tabs

Office Profile Tabs must be populated in order to fully utilize the Office management features of WOLFconnect.

Contracts Tab

The Contracts tab displays Contracts made between the Region and the Office along with agreed-upon Quota Details.

Tip See the Office Setup section for more detail.

Agents Tab

The Agents tab displays all Agents associated with the Office.

Tip See the Adding and Managing Agents/Staff section for more detail.

Staff Tab

The Staff tab displays all Staff associated with the Office.

Tip See the Adding and Managing Agents/Staff section for more detail.

Key Contacts Tab

The Key Contacts tab is used to record contact information for specific requests. Default requests are General Contact, Accounting, Administration, Listings and Transactions. Offices can designate contacts for each request or use the General Contact information for all requests.

1. Select the **Office**, **Region** or **Franchise** by typing in the text field or clicking the **Look-Up** icon.
2. To add a new Contact, click the **Add Key Contact** button.
3. Select a request from the **Contact For** drop-down menu.

Tip At any time you can select the **Use General** checkbox ☑ option to automatically populate the general contact information for the Contact.

4. Select the Contact by typing in the **Name** text field or clicking the **Look-Up** icon. Clear the Name field by clicking the **Clear** icon .

Tip Select the **Manual Entry** checkbox ☑ to have access to all text fields.

5. If desired, enter a Title for the Contact in the **Title** text field.
6. Click the **Save** button to save your changes or Cancel.

Tip Edit a Key Contact by clicking the **Edit** icon .

Sub-Offices Tab

The Sub-Offices tab displays any sub-offices associated with the Office and allows creation of new sub-offices.

1. Click the **Add Office** button.
2. Populate the Profile page with information about the Office. Required fields are indicated by a red asterisk *.
3. Click the **Save** button to save your changes or Cancel.

Tip See the Adding a New Office section for more detail.

Insurance Tab

The Insurance tab displays insurance information for the Office.

Insurance for Errors and Omissions, General Office Liability and Automobile Liability are necessary for any Office.

1. Click the **Add Insurance** button.
2. Select the **Insurance Type** from the drop-down menu.
3. Enter the **Insurance Company** in the text field.
4. Enter the **Policy #** in the text field.
5. Select the **Start Date** using the calendar control.
6. Select the **Expiry Date** using the calendar control.
7. Click the **Save** button to save your changes or Cancel.

Tip Delete insurance by clicking the **Edit** icon. Delete insurance by clicking the **Delete** icon.

Specialties Tab

The Specialties tab contains information on the function of the Office.

1. To Edit the Specialties information, click the **Edit** button.
2. Enter the **Roster City** in the text field.

Tip Roster City is the City where the Office is located.

3. Select the **Density** of the serviced city from the drop-down menu.
4. Select the **Ad Zone Code** from the drop-down menu.
5. Select an Area Code from the list of **Available Service Area Codes** and click the **Add** button to add that Area Code to the **Selected Service Area Codes**. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
6. Select a Specialty from the **Area of Specialization** drop-down menu.
7. Select Civil Activities from the list of **Available Activities** and click the **Add** button to add that activity to the **Selected Activities**. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
8. Click the **Save** button to save your changes or Cancel.

User Defined Fields Tab

The User Defined Fields tab contains fields created by Regional Administration for instances where no such field currently exists. For example, a secondary email address.

User Defined Fields created in the General Settings menu will appear in the User Defined Fields tab in Office Profiles.

Recurring Office Charges Tab

The Recurring Office Charges tab displays recurring charges associated with the Office.

Tip See the Office Setup section for more detail.

Default Agent Recurring Tab

The Default Agent Recurring tab displays recurring charges applied to any Agents associated with the Office.

Tip See the Office Setup section for more detail.

A/R Inquiry Tab

The A/R Inquiry tab displays past accounting charges applied to the Office. This information can be exported into PDF for viewing and printing.

Tip The A/R Inquiry tab displays only outstanding charges by default. Deselect the **Outstanding Items Only** checkbox ☑ to view all past charges.

Document Tab

The Documents tab is used to store frequently used files and documents including logos, text files, etc.

1. To store a document on the Document page, click the **Add Document** button.
2. Click the **Browse** button. Select the file to be stored and click the **Open** button.
3. Enter the name of the file in the **Display Name** text field.
4. Enter a description of the file in the **Description** text field.
5. Click the **Upload** button to store the file or Cancel.

Notes Tab

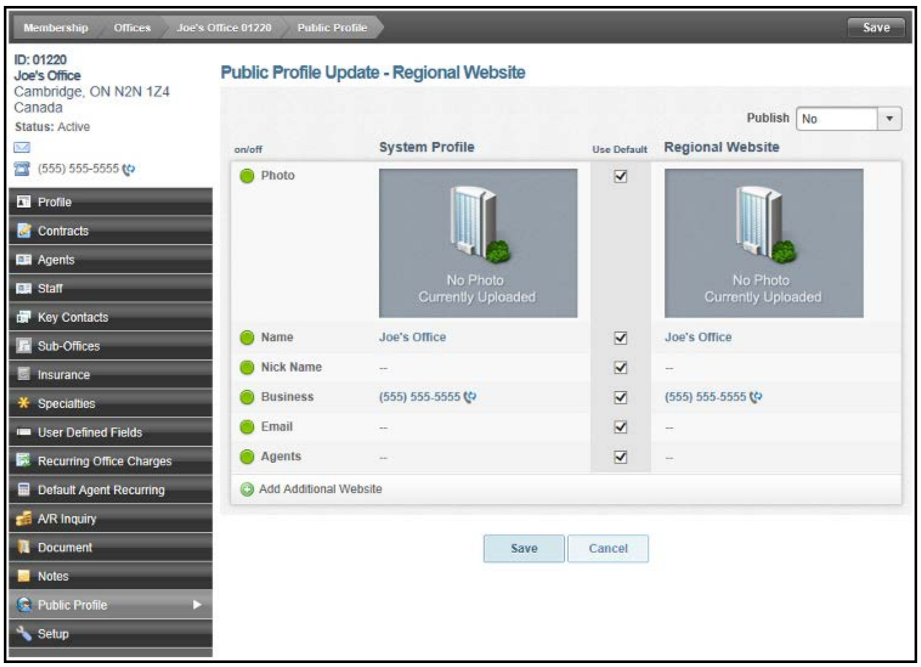
The Notes tab is used to enter notes for the purpose of organization within WOLFconnect.

1. To add a Note to an Office Profile, click the **Add Note** button.
2. Select the type of Note from the **Type** drop-down menu.
3. Indicate if the note will be private by selecting the **Private** checkbox ☑.
4. Enter the note in the **Note** text field.
5. Click the **Save** button to save your changes or Cancel.

Tip Notes can only be viewed by users of the same or higher permission level as the user who created the note.

Public Profile Tab

The Public Profile tab allows management of the Office's online presence.



WOLFtracks Screen Overview

1. Click the desired Public Profile.
2. Each category can be enabled or disabled by clicking the **toggle** ●. Using the toggle will enable or disable that category for both the WOLFconnect Profile and the particular Public Profile.

Tip A category can be enabled in the WOLFconnect Profile but disabled in the Public Profile by deselecting the checkmark ☑ beside the category on the right side of the screen.

3. Publish a Public Profile by selecting Yes in the **Publish** drop-down menu in the top-right of the screen.

Tip Click the **Add Additional Website** button to add additional website information to the selected Public Profile.

4. Click the **Save** button to save your changes or Cancel.

Setup Tab

The Setup tab displays information integral to a fully-functioning Office.

- Payment
- Integrations
- Invoicing
- Transaction
- Branding

Tip See the Office Setup section for more detail.

Adding an Office Photo

Office photos can be added to appear within WOLFconnect or on external websites.

Photo Specifications

Photos should adhere to the following parameters to produce the sharpest image:

- Photo should be 140 pixels wide or no more than 216 pixels in height
- File must be .JPG or .GIF format
- Files names cannot contain symbols
- File size must be less than 250 KB

1. To add a photo to the Office Profile, click the **Edit** button in the Profile tab.
2. Click the **Change Photo** button.
3. Click the **Browse** button. Select the photo to be used and click the **Open** button.
4. Resize the photo by clicking and dragging the photo frame, using the Image Preview as a guide.
5. Click the **Save** button to save your changes or Cancel.
6. On the Office Profile page, click the **Save** button to save your changes or Cancel.

MEMBERSHIP

FINANCIAL | CONTACT MANAGEMENT |

LONE WOLF WOLFconnect

Office Setup

The Contracts, Recurring Charges and Setup tabs contain information relevant to the relationship between the Region and Office.

Contracts

The Contracts tab displays Contracts made between the Region and the Office along with agreed-upon Quota Details.

Adding a Contract

1. In the Navigation menu, click **Membership**. In the Offices submenu, click **Manage**.
2. Click the desired Office.
3. Click the **Contracts** tab.
4. Click the **Add Contract** button.

Tip Required fields are indicated by a red asterisk *.

5. Select the **Type** from the drop-down menu.
6. Select the **Start Date** using the calendar control.
7. Enter the Fee Paid to the Franchisor in the **Fee Paid** text field.
8. Enter the fee required to renew the Contract in the **Future Renewal Fee** text field.
9. Select the **Renewal Due Date** using the calendar control.
10. Select the **Sale Type** from the drop-down menu.

Contract Owners

Tip See the Franchise section for more detail on managing Owners.

Contracts must contain at least one Office Owner.

Tip Import Owners from the latest Contract by clicking the **Import** icon.

11. Click the **Add Owner** button.
12. Click the **Look-Up** icon.
13. Click the desired Owner.
14. Enter the percentage the particular Owner is responsible for in the **Percent** text field.
15. If applicable, select the **Silent** checkbox.
16. Click the **Save** icon to save your changes or Cancel.

Tip Click the **Add Owner** button for each additional Owner. Edit an Owner by clicking the **Edit** icon. Delete an Owner by clicking the **Delete** icon.

17. Click the **Save** button to save your changes or Cancel.

Tip Edit a Contract by clicking the **Edit** icon. Delete a Contract by clicking the **Delete** icon.

Quota Details

Quotas are often agreed upon between Regions and Offices to determine what is expected of an Office.

Adding a New Quota

1. Click the **Add Quota** button.
2. Select the **Start Date** using the calendar control.
3. If applicable, select the **End Date** using the calendar control.
4. Select the **Quota Type** from the drop-down menu.
5. Enter the **Count** in the text field.
6. Select if a penalty will be applied for failure to meet the quota from the **Apply Penalty** drop-down menu.
7. Click the **Save** icon to save your changes or Cancel.

Tip Edit a Quota by clicking the **Edit** icon. Delete a Quota by clicking the **Delete** icon.

Recurring Office Charges

Recurring Office Charges are charges that can be applied on a recurring basis on behalf of the Region.

Adding a New Recurring Charge

1. In the Navigation menu, click **Membership**. In the Offices submenu, click **Manage**.
2. Click the desired Office.
3. Click the **Recurring Office Charges** tab.

Tip View Inactive Recurring Charges by selecting the **Show Inactive** checkbox ☑.

4. Click the **Add Entry** button.

Tip Required fields are indicated by a red asterisk *.

5. Select the Region to bill from by clicking the **Bill From Region Look-Up** icon.
6. Select the **Charge Code** to apply to the Recurring Charge by clicking the **Look-Up** icon.

Tip Clear the Charge Code field by clicking the **Clear** icon.

7. Enter a **Description** for the Recurring Charge in the text field.
8. Select whether to bill to an Office, Third Party Office or Partner from the **Bill To** drop-down menu.
9. Select the **Start Date** using the calendar control.
10. Select the **Frequency** of the Recurring Charge from the drop-down menu.
11. If applicable, enter the **Quantity** and **Amount** of the Recurring Charge in the text fields.
12. Click the **Save** button to save your changes or Cancel.

Tip Edit a Recurring Charge by clicking the **Edit** icon. Recurring Charges cannot be deleted but can be set as Inactive using the **End Date** calendar control.

Recurring Agent Charges

Recurring Agent Charges are charges that can be applied on a recurring basis on behalf of the Franchisor or Region.

Adding a New Agent Recurring Charge

1. In the Navigation menu, click **Membership**. In the Offices submenu, click **Manage**.
2. Click the desired Office.
3. Click the **Default Agent Recurring** tab.
4. Click the **Add Entry** button.

Tip Required fields are indicated by a red asterisk *.

5. Select the **Bill From** option using the drop-down menu.
6. Select the **Charge Code** to apply to the Recurring Charge by clicking the **Look-Up** icon.
7. Enter a **Description** for the Recurring Agent Charge in the text field.
8. Select whether to bill to an Office, Third Party Office, Partner or Agent from the **Bill To** drop-down menu.
9. Select the **Start Date** using the calendar control.
10. Select the **Frequency** of the Recurring Charge from the drop-down menu.
11. If applicable, enter the **Quantity** and **Amount** of the Recurring Charge in the text fields.
12. Click the **Save** button to save your changes or Cancel.

Tip Edit a Recurring Charge by clicking the **Edit** icon. Recurring Charges cannot be deleted by can be set as Inactive using the **End Date** calendar control.

Office Setup

The Setup tab displays information integral to a fully-functioning Office.

1. In the Navigation menu, click **Membership**. In the Office submenu, click **Manage**.
2. Click the desired Office.
3. Click the **Setup** tab.

Payment

Payment information is required to configure Pre-Authorized Payments.

1. Click the **Payment** button.
2. Click the **Edit** button.
3. Enter Bank Account Information.
4. Click the **Save** button to save your changes or Cancel.

Integrations

The Integration button displays information such as the Penderis and Connect Codes and URL for the Office-level WOLFconnect.

Invoicing

The Invoicing button is used to configure invoicing, tax and division options.

1. Click the **Invoicing** button.
2. Click the **Edit** button.
3. Select whether to **Email** or **Print** invoices using the radio buttons.
4. Select applicable taxes from the list of **Available Taxes** and click the **Add** button to add that tax to the **Selected Taxes**. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.

Tip An asterisk will indicate taxes that match jurisdiction information provided previously for the Office. See the Adding Offices section for more detail.

5. Select the **Division** from the drop-down menu.
6. Click the **Save** button to save your changes or Cancel.

Transaction

Tip Transaction settings can only be configured in the Region Profile.

The Transaction button displays the next Transaction Number in-sequence and the setting for Manual Entry.

Tip brokerWOLF-integrated clients manage Transaction settings within brokerWOLF.

Branding

The Branding button displays Office branding information.

1. Click the **Branding** button.
2. Click the **Edit** button.
3. If desired, select the **Use Parent Office Settings** checkbox ☑.
4. Select the **Colour** from the drop-down menu.
5. Select Logos from the drop-down menus and click the **Preview** icons to view the Logos.
6. Click the **Save** button to save your changes or Cancel.

MEMBERSHIP

FINANCIAL | CONTACT MANAGEMENT |

- ADDING AND MANAGING AGENT AND STAFF
- MLS IDS
- GRANTING ACCESS AND USER ROLES
- TRAINING COURSES
- ADDING OFFICES
- OFFICE SETUP
- **SINGLE SIGN-ON**

LONE WOLF WOLFconnect

Single Sign-On

Single Sign-On (SSO) is an authentication process that enables users to enter one set of login credentials to access more than one system or program.

The implementation of SSO in Lone Wolf software provides a centralized location for Brokers, Agents and Administrators to access information and applications they need using one login.

Tip Lone Wolf software can be used to sign-in to existing accounts with any of our Partners.

Configuring a Single Sign-On Partner

Tip Access to the Setup Tab is dependent on user permissions. See the Granting Access and User Roles section for more detail.

1. In the Navigation menu, click **Membership**. In the Agent/Staff submenu, click **Manage**.
2. Search for the desired Agent/Staff Member and click the Profile.
3. Click the **Setup** tab.
4. Click the **SSO Setup** button.
5. Click the **Edit** button.
6. Click the **Add SSO Record** button.
7. Select the partner from the **Partner Name** drop-down menu.
8. Enter the **User ID** and **Password** for the selected Partner.
9. If desired, select the **Display Password** checkbox ☑ to display the password.
10. Click the **Save** button to save your changes or Cancel.

Tip A tab will appear in the bottom-right corner of the screen once the SSO Partner has been configured. Users can click the Partner tab to automatically sign in to the SSO Partner service.

CONTACT MANAGEMENT

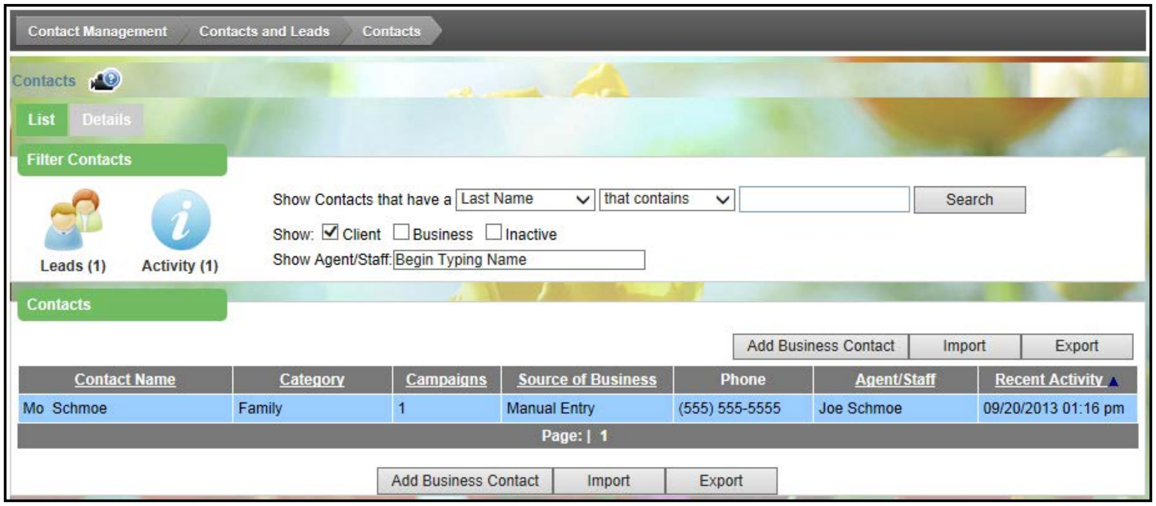
RESOURCES | STO

CONTACTS AND LEADS

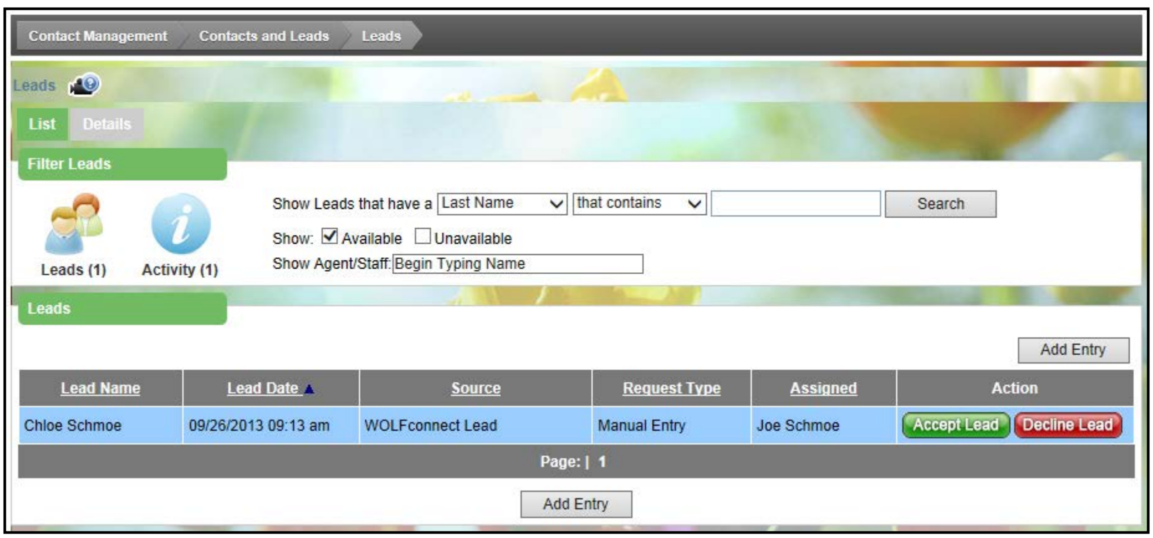
DRIP MARKETING

LONE WOLF WOLFconnect

Contacts and Leads



Contacts Screen



Leads Screen

Leads are a call to action. They can be manually entered and distributed in the WOLFconnect system or automatically sent and distributed via globalWOLF websites. Once accepted by an Agent, a Lead becomes a Contact.

Leads

A flashing Lead Icon indicates Leads awaiting action and will also indicate the amount of Leads awaiting action.

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, click **Manage**.

Accepting Leads

Tip Agents who receive Lead Assigned email notifications in HTML format can accept or decline leads instantly on their mobile device. See the Messaging section for more detail.

1. Click the **Accept Lead** button beside the desired Lead.
2. A prompt will appear confirming Lead assignment. Click the **OK** button to confirm or Cancel.

Tip Upon acceptance the Lead will be moved to Contacts. Navigation to Contacts will be required to edit the record in the future. See the Editing a Contact section for more detail.

Declining Leads

1. Click the **Decline Lead** button beside the desired Lead.
2. A prompt will appear confirming the Decline Lead option. Click the **OK** button to confirm or Cancel.

Tip Upon decline the Lead Administrator will be notified that the Lead now needs to be re-assigned.

Adding a Lead Manually

1. Click the **Add Entry** button.

Tip If entered by an Agent, the Contact Assigned To field will automatically be populated with information for the Agent adding the Lead. User permission level can be changed to manually assign leads or use distribution rules. See the Granting Access and User Roles section for more detail.

2. Select a **Category**, **Source of Business** and **Status** for the Lead from the drop-down menus.
3. Indicate whether or not the Lead should be contacted by email or phone using the **Do Not Email** and **Do Not Call** checkboxes ☑.
4. Populate the **Contact Information Tab** with information about the Lead.

Tip First Name, Last Name and Email are required fields.

5. Click the **Save** button to save your changes or Cancel.
6. A prompt will appear confirming Lead assignment as a Client Contact. Click the **OK** button to confirm or Cancel.

Tip The Lead will remain open for further editing but upon Save will be moved to Contacts if entered by an Agent. Navigation to Contacts will be required to edit the record in the future. See the Contacts section for more detail.

7. Click the **Family Information** Tab and populate.
8. Click the **Notes** Tab. Click the **Add Entry** button to add Notes to the Lead. Click the **Save** button to save your changes or Cancel.

Tip Notes added here can be added as a WIGO Reminder when Action Is Required or a Follow-Up Date is entered. See the WIGO Settings section for more detail.

9. Click the **Activity** Tab to view activity related to the Lead.

Tip The Activity Tab displays the Lead's recent activity on globalWOLF websites as well as logs and tracking information. Use the checkboxes ☑ to select which information displays in the Activity Tab.

10. Click the **Drip Marketing Campaign** Tab. Click the **Add Entry** button to add Drip Marketing options to the Lead.

Tip See the Drip Marketing section for more detail.

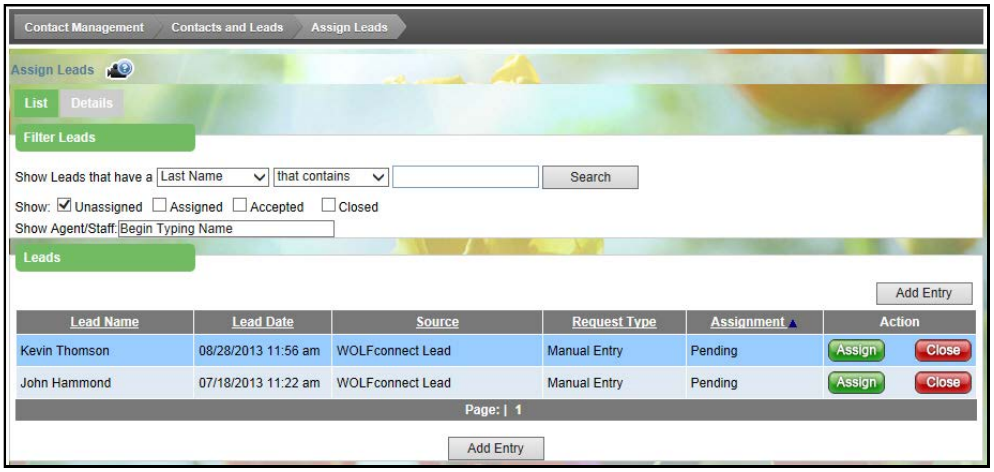
11. Click the **Manage Searches** Tab.

Tip The Manage Searches Tab is only available to globalWOLF clients. Saved search parameters saved by the Lead can be viewed here.

Assigning Leads

Tip The ability to assign Leads is dependent on user permission level. See the Granting Access and User Roles section for more detail.

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, click **Assign Leads**.



Assigning Leads Window

2. Click the **Assign** button on the desired Lead.
3. In the Assign Lead window, search for the desired Agent using the **Selection List** text field or browse the list manually.
4. Select individual Agents and click the **Add** button to assign the Lead to those Agents. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
5. Click the **Assign** button to save your changes or Cancel.

Tip Leads can also be automatically generated through registration on a globalWOLF website and assigned through the Assign Leads window. See the globalWOLF Agent Website Web Forms section for more detail.

Re-Assigning Leads

Tip The ability to re-assign Leads is dependent on user permission level. See the Granting Access and User Roles section for more detail.

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, click **Assign Leads**.
2. In the Filter Leads options, click the **Accepted** checkbox ☑ to display Leads that have been accepted by Agents.
3. Click the **Reassign** button for the desired Lead.
4. Select individual Agents and click the **Add** button to assign the Lead to those Agents. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
5. Click the **Assign** button to save your changes or Cancel.

Closing Leads

Tip Only Unassigned Leads can be closed. Under any other status the Lead can be deactivated. See the Deactivating Contacts section for more detail.

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, click **Assign Leads**.
2. In the Filter Leads options, select the **Unassigned** checkbox ☑ to display Leads that have been unassigned.
3. Click the **Close** button for the desired Lead.
4. Select the **Reason to Close Lead** from the drop-down menu.
5. Click the **Close Lead** button to save your changes or Cancel.

Contacts

A flashing Activity Icon indicates Client Contacts have recently been active on globalWOLF and will also indicate the amount of active Client Contacts.

Adding a Contact

1. In the Navigation menu, click **Contact Management**. In the Contacts submenu, click **Client Contacts**.

or

1. In the Navigation menu, click **Contact Management**. In the Contacts submenu, click **Business Contacts**.
2. Click the **Add Client Contact** button.

or

2. Click the **Add Business Contact** button.

Tip The Contact Assigned To field will automatically be populated with information for the user adding the Contact. User permission level can be changed to manually assign leads or use distribution rules. See the Granting Access and User Roles section for more detail.

3. Select a **Category** and **Status** for the Contact from the drop-down menus.

Tip Select a **Source of Business** for Client Contacts from the drop-down menu.

4. Indicate whether or not the Lead should be contacted by email or phone using the **Do Not Email** and **Do Not Call** checkboxes ☑.
5. Populate the Contact Information Tab with information about the Contact.
6. Click the **Save** button to save your changes or Cancel.
7. Click the **Family Information** Tab and populate.

8. Click the **Notes** Tab. Click the **Add Entry** button to add Notes to the Contact. Click the **Save** button to save your changes or Cancel.

Tip Notes added here can be added as a WIGO Reminder when Action Is Required or a Follow-Up Date is entered. See the WIGO Settings section for more detail.

9. Click the **Drip Marketing Campaign** Tab. Click the **Add Entry** button to add Drip Marketing options to the Contact.

Tip See the Drip Marketing section for more detail.

Deleting Contacts

1. Click the desired contact.
2. Click the **Contact Information** Tab.
3. Click the **Delete** button.
4. A prompt will appear confirming contact deletion. Click the **OK** button to confirm or Cancel.

Importing Contacts

Agents who store Contact Information in another program can export that data to a Microsoft Excel spreadsheet, save it as a plain text (.txt) file and import it into WOLFconnect.

Separate Microsoft Excel spreadsheets must be created for Client Contacts and Business Contacts. Each column must be present on the spreadsheet regardless of if data is contained within that column.

1. Click the **Import** button.
2. Click the **Print** button to view the File Layout Print Instructions.

or

2. Click the **Import** button.
3. Click the **Browse** button, select the plain text file (.txt) to import and click **Open**.
4. Depending on the type of contacts to be imported, click the **Import as Client Contacts** or I**mport as Business Contacts** button.

Exporting Contacts

Tip When exporting Contact Information, it is important to filter the information down to specific data parameters for the export file.

1. Use the filters to choose which Contacts will be displayed for exporting.
2. Click the **Export** button.
3. Follow the browser prompts and save the plain text file (.txt).

Deactivating Contacts

Tip Any Lead or Contact can be deactivated whether Assigned or Unassigned.

1. Click the desired contact.
2. Click the **Contact Information** Tab.
3. Select Inactive from the **Status** drop-down menu.
4. Click the **Save** button to save your changes or Cancel.

Reports

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, click the **Reports** icon .
2. Select the desired report from the **Report Name** drop-down menu.
3. Click the **View/Print** button.

or

3. Click the **Send** button.

Tip Clicking the Send button will display the Create Message window. See the Create a Message section for more detail.

Office/Agent Lead Summary

The Office/Agent Lead Summary displays:

- An alphabetical list of all Agents
- Number of clients per Agent
- Number of Leads awaiting acceptance per Agent
- Number of Leads declined per Agent
- Number of Leads missed per Agent
- Number of Saved Searches recorded for their Contacts per Agent (globalWOLF clients only)

Leads Settings

General Settings

Lead Admin Email – The Lead Administrator is notified when Leads are added to WOLFconnect, assigned to and accepted by Agents or are pending assignment. If there is one person within your company that is assigned as Lead Administrator, enter their email address here.

Tip If there is a separate Lead Administrator for each office, this can be configured within the Office Profile.

Business Contacts Require Email – This setting controls whether an email address is required when entering Business Contacts into WOLFconnect.

Manual Leads/Client Contacts Require Email – This setting controls whether an email address is required when entering Client Contacts or Manual Leads into WOLFconnect.

Auto Response Emails from Agent Websites – This setting controls the source of emails sent to customers after they have entered an email address on a globalWOLF website.

Lead Admin Notifications – This setting controls which notifications are sent to the Lead Administrator.

Returning Visitor Matching

Return Visitor Matching allows control of where inquiries made by returning Leads will be distributed.

Office Site: Check Leads – WOLFconnect will look for matches in the Leads section for new Leads generated from globalWOLF Office websites based on criteria chosen by the user. When None is selected each inquiry creates a new Lead.

Office Site: Check Contacts – WOLFconnect will look for matches in the Contacts section for new Leads generated from globalWOLF Office websites based on criteria chosen by the user. When None is selected each inquiry creates a new Lead.

Agent Site: Check Leads – WOLFconnect will look for matches in the Leads section for new Leads generated from globalWOLF Agent websites based on criteria chosen by the user. When None is selected each inquiry creates a new Lead.

Agent Site: Check Contacts – WOLFconnect will look for matches in the Contacts section for new Leads generated from globalWOLF Agent websites based on criteria chosen by the user. When None is selected each inquiry creates a new Lead.

Lead Matching Fields – When performing the above processes, WOLFconnect will search for matching records using Email Address and Name or just Email Address.

Agent Site: Check Leads – WOLFconnect will look for matches in the Leads section for new Leads generated from globalWOLF Agent websites based on criteria chosen by the user. When None is selected each inquiry creates a new Lead.

Referrals

Referral settings allow the user to configure referral fees applied to Leads and which types of Leads to apply fees to.

Default Referral Fee – A percentage or dollar amount can be entered in this text field. This fee will appear in the Referral section of the Lead Contact Information Tab for all Leads entered into WOLFconnect unless otherwise specified in the options below.

Charge Referral Fee on Leads from Agent Websites – This setting controls the default referral fee for Leads generated from globalWOLF Agent websites.

Charge Referral Fee on Leads assigned to Source Agent from Office Websites –This setting controls the default referral fee for Leads generated from globalWOLF Office websites and assigned to the Listing Agent.

Sync Imported Contacts to brokerWOLF – This setting controls the sync feature that imports contacts from brokerWOLF. See the Importing Contacts section for more detail.

Drip Marketing

See the Drip Marketing section for more detail.

Client Contact Categories

Client Contact Categories allow Agents to classify Buyers and Sellers for the Contacts and Leads window and for use as a trigger in Drip Marketing Campaigns.

Tip WOLFconnect comes equipped with a number of Client Contact Categories. Users are capable of editing and deleting these categories but cannot delete categories with Contacts and Leads assigned to them.

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, mouse-over the **Settings** icon and click **Client Content Categories**.

Adding a Client Contact Category

1. Click the **Add Entry** button.
2. Select a person or office to attach the category to using the **Person/Office Attached To** drop-down menu.
3. Enter a name for the category in the **Category Name** text field.
4. Enter a description for the category in the **Description** text field.
5. Click the **Save** button to save your changes or Cancel.

Editing a Client Contact Category

1. Click the desired **Client Contact Category**.
2. Edit the category as desired.
3. Click the **Save** button to save your changes or Cancel.

Deleting a Client Contact Category

Tip Only Client Contact Categories with no Contacts or Leads assigned to them can be deleted.

1. Click the desired **Client Contact Category**.
2. Click the **Delete** button.
3. A prompt will appear confirming category deletion. Click the **OK** button or Cancel.
4. Click the **Save** button to save your changes or Cancel.

Contact Action Required List

The Contact Action Required List setting controls the options available in the Action Required drop-down menu when adding a note to a Client Contact.

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, mouse-over the **Settings** icon and click **Contact Action Required List**.

Add a Contact Action Required

1. Click the **Add Entry** button.
2. Enter a name for the action in the **Contact Action Required** text field.
3. Click the **Save** button to save your changes or Cancel.

Edit a Contact Action Required

1. Click the desired **Contact Action**.
2. Edit the action as desired.
3. Click the **Save** button to save your changes or Cancel.

Delete a Contact Action Required

1. Click the desired **Contact Action**.
2. Click the **Delete** button.
3. A prompt will appear confirming action deletion. Click the **OK** button or Cancel.

Contact Action Taken List

The Contact Action Taken List setting controls the options available in the Action Taken drop-down menu when adding a note to a Client Contact.

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, mouse-over the **Settings** icon and click **Contact Action Required List**.

Add a Contact Action Taken

1. Click the **Add Entry** button.
2. Enter a name for the action in the **Contact Action Taken** text field.
3. Click the **Save** button to save your changes or Cancel.

Edit a Contact Action Taken

1. Click the desired **Contact Action**.
2. Edit the action as desired.
3. Click the **Save** button to save your changes or Cancel.

Delete a Contact Action Taken

1. Click the desired **Contact Action**.
2. Click the **Delete** button.
3. A prompt will appear confirming action deletion. Click the **OK** button or Cancel.

Source of Business

Source of Business allows Agents to classify Buyers and Sellers for the Contacts and Leads window and for use as a trigger in Drip Marketing Campaigns.

Tip WOLFconnect comes equipped with a number of Business Sources. Users are capable of editing and deleting these categories but cannot delete sources with Contacts or Leads assigned to them.

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, mouse-over the **Settings** icon and click **Source of Business**.

Adding a Source of Business

1. Click the **Add Entry** button.
2. Enter a name for the source in the **Source of Business** text field.
3. Click the **Save** button to save your changes or Cancel.

Editing a Source of Business

1. Click the desired **Source of Business**.
2. Edit the category as desired.
3. Click the **Save** button to save your changes or Cancel.

Deleting a Source of Business

Tip Only Business Sources with no Contacts or Leads assigned to them can be deleted.

1. Click the desired **Source of Business**.
2. Click the **Delete** button.
3. A prompt will appear confirming category deletion. Click the **OK** button or Cancel.
4. Click the **Save** button to save your changes or Cancel.

Delete Imported Leads/Contacts

Previously imported Leads and Contacts can be deleted here.

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, mouse-over the **Settings** icon and click **Delete Imported Leads/Contacts**.
2. Select **User Batch Imports** or **Company Batch Imports** using the radio buttons.
3. Click the **Delete** button.
4. A prompt will appear confirming deletion. Click the **OK** button to confirm or Cancel.

Lead Email Setup

The Lead Email Setup allows customization of Lead emails sent to Agents and Lead Administrators.

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, mouse-over the **Settings** icon and click **Lead Email Setup**.
2. Click the desired email template to edit.

Company Logo

Each template contains a company logo.

1. Click the **Upload New Logo** button.
2. Select an existing logo that was previously uploaded by using the drop-down menu or click the **Browse** button.
3. Select the logo to be used and click the **Open** button. The logo will automatically be resized to fit the email template.

Template Header

Each template can be customized with a unique header.

1. Click the **Upload New Header** button.
2. Select an existing header that was previously uploaded by using the drop-down menu or click the **Browse** button.
3. Select the header to be used and click the **Open** button.

Select Heading Background and Text Colour

Heading background and text colour can be changed to match your company branding.

1. Click the **Heading Background Color** or **Select Heading Text Color** button.
2. Use the colour selection tools to customize the colour.
3. Click the **OK** button.

Content Toggles

Each content option is displayed with a toggle allowing you to enable or disable that content for the particular email.

Red – This content will not appear in the email
Green – This content will appear in the email

Additional Notes

1. Add additional text to an email by enabling Additional Notes using the **toggle** .
2. Enter any desired text into the text field provided and format.
3. Click the **Save** button to save your changes or Cancel.

Lead Pools

Lead Pools are a group of Agents to whom Leads are directed through a Lead Distribution Rule.

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, mouse-over the **Settings** icon and click **Lead Pools**.
2. Click the **Add Entry** button.
3. Enter a name for the Lead Pool in the **Pool Name** text field.
4. Select individual Agents and click the **Add** button to assign the Lead to those Agents. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
5. Click the **Save** button to save your changes or Cancel.

Lead Opt Out

Lead Opt Out allows selection of Agents who will never receive Leads.

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, mouse-over the **Settings** icon and click **Lead Opt Out**.
2. Select individual Agents and click the **Add** button to assign the Lead to those Agents. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
3. Click the **Save** button to save your changes.

Distribution Rules

Distribution Rules allow WOLFconnect to assign Leads according to user parameters.

1. In the Navigation menu, click **Contact Management**. In the Leads submenu, mouse-over the **Settings** icon and click **Distribution Rules**.

Tip Default rules are indicated by a checkmark ✔.

2. Click the **Add Office Site Rule** or **Add Agent Site Rule** button.
3. Enter a name for the rule in the **Name** text field.
4. Select if the new rule will be considered **Default** by using the checkbox ☑.
5. Select the **Assignment Type** using the drop-down menu.

Assignment Types

Tip Delete an Assignment Type at any time by clicking the **Delete** icon.

Alphabetical Agents

Sends Leads to Agents in descending alphabetical order.

1. Select **Alphabetical Agents** from the drop-down menu.
2. Enter the number of Agents in the **# of Agents** text field. This determines the number of Agents WOLFconnect will send the Lead to.
3. Select if WOLFconnect will restrict the Leads to Agents with websites by using the **Website** drop-down menu.
4. Select the time limit to accept the Lead using the **Time to Accept** drop-down menu.
5. Select the amount of times the sent Lead will be repeated using the **Repeat** drop-down menu.
6. Set the order of the actions by using the up and down arrows.
7. Click the **Add Step** button.

Lead Pool – Alphabetical

Sends Leads to Agents within a specific Lead Pool in descending alphabetical order.

1. Select **Lead Pool – Alphabetical** from the drop-down menu.
2. Enter the number of Agents in the **# of Agents** text field. This determines the number of Agents WOLFconnect will send the Lead to.
3. Select the **Lead Pool** to send Leads to. See the Lead Pools section for more detail.

Tip Selecting All from the **Lead Pool** drop-down menu includes all Agents in the Distribution Rule.

4. Select the time limit to accept the Lead using the **Time to Accept** drop-down menu.
5. Select the amount of times the sent Lead will be repeated using the **Repeat** drop-down menu.
6. Set the order of the actions by using the up and down arrows.
7. Click the **Add Step** button.

Lead Pool – Random

Sends Leads to Agents within a specific Lead Pool in a random order.

1. Select **Lead Pool – Random** from the drop-down menu.
2. Enter the number of Agents in the **# of Agents** text field. This determines the number of Agents WOLFconnect will send the Lead to.
3. Select the **Lead Pool** to send Leads to. See the Lead Pools section for more detail.

Tip Selecting All from the **Lead Pool** drop-down menu includes all Agents in the Distribution Rule.

4. Select the time limit to accept the Lead using the **Time to Accept** drop-down menu.
5. Select the amount of times the sent Lead will be repeated using the **Repeat** drop-down menu.
6. Set the order of the actions by using the up and down arrows.
7. Click the **Add Step** button.

Manual

Places Leads in the Assign Leads window for manual assignment by a Lead Administrator. See the Assigning Leads section for more detail.

1. Select **Manual** from the drop-down menu.
2. Enter the email address of the Lead Administrator in the **Notify Email** text field.
3. Select the time limit to assign Leads using the **Time to Assign** drop-down menu.
4. Select the amount of times the sent Lead will be repeated using the **Repeat** drop-down menu.
5. Set the order of the actions by using the up ⬆ and down ⬇ arrows.
6. Click the **Add Step** button.

Random Agents

Sends Leads to Agents in a random order.

1. Select **Random** from the drop-down menu.
2. Enter the number of Agents in the **# of Agents** text field. This determines the number of Agents WOLFconnect will send the Lead to.
3. Select if WOLFconnect will restrict the Leads to Agents with websites by using the **Website** drop-down menu.
4. Select the time limit to accept the Lead using the **Time to Accept** drop-down menu.
5. Select the amount of times the sent Lead will be repeated using the **Repeat** drop-down menu.
6. Set the order of the actions by using the up ⬆ and down ⬇ arrows.
7. Click the **Add Step** button.

Source Agent

Sends Leads to the Listing Agent when the Lead originates from a globalWOLF Office website or sends the Lead to the Agent who owns the website when the Lead originates from a globalWOLF Agent website.

1. Select **Source Agent** from the drop-down menu.
2. Select the time limit to accept the Lead using the **Time to Accept** drop-down menu.
3. Set the order of the actions by using the up ⬆ and down ⬇ arrows.
4. Click the **Add Step** button.

Source Office – Alphabetical

Sends Leads to Agents whose primary Office owns the globalWOLF Office website or to Agents whose Office was selected by the Lead (where Office selection is a mandatory field on the globalWOLF Office website) in descending alphabetical order.

1. Select **Source Office – Alphabetical** from the drop-down menu.
2. Enter the number of Agents in the **# of Agents** text field. This determines the number of Agents WOLFconnect will send the Lead to.
3. Select if WOLFconnect will restrict the Leads to Agents with websites by using the **Website** drop-down menu.
4. Select the time limit to accept the Lead using the **Time to Accept** drop-down menu.
5. Set the order of the actions by using the up ⬆ and down ⬇ arrows.
6. Click the **Add Step** button.

Source Office – Manual

Places Leads in the Assign Leads window for manual assignment by the Lead Administrator whose Office owns the globalWOLF Office website or to the Lead Administrator whose Office was selected by the Lead (where Office selection is a mandatory field on the globalWOLF Office website).

1. Select **Source Office – Manual** from the drop-down menu.
2. Enter the email address of the Lead Administrator in the **Notify Email** text field.
3. Select the time limit to assign Leads using the **Time to Assign** drop-down menu.
4. Select the amount of times the sent Lead will be repeated using the **Repeat** drop-down menu.
5. Set the order of the actions by using the up and down arrows.
6. Click the **Add Step** button.

Source Office – Random

Sends Leads to Agents whose primary Office owns the globalWOLF Office website or to Agents whose Office was selected by the Lead (where Office selection is a mandatory field on the globalWOLF Office website) in a random order.

1. Select **Source Office – Random** from the drop-down menu.
2. Enter the number of Agents in the **# of Agents** text field. This determines the number of Agents WOLFconnect will send the Lead to.
3. Select if WOLFconnect will restrict the Leads to Agents with websites by using the **Website** drop-down menu.
4. Select the time limit to accept the Lead using the **Time to Accept** drop-down menu.
5. Set the order of the actions by using the up and down arrows.
6. Click the **Add Step** button.

Specified Person

Sends Leads to a specific individual.

1. Select **Specified Person** from the drop-down menu.
2. Enter the name of the person in the **Assigned To** text and click the name once it appears.
3. Select the time limit to accept the Lead using the **Time to Accept** drop-down menu.
4. Set the order of the actions by using the up and down arrows.
5. Click the **Add Step** button.

Business Hours and After Hours

Each Distribution Rule can be configured for different Lead assignment methods for Business Hours and After Hours.

1. Click the **Edit Business Hours** button in the Distribution Rules list or click the **Edit** icon within a specific Distribution Rule.

2. Select the type of hours to set by clicking an option between **Closed Hours**, **Business Hours** and **After Hours**.
3. Select the **Business**, **Closed** or **After Hours**.
4. Click the **Save** button to save your changes or Cancel.

Tip By default Business Hours are set from 9 a.m. to 5 p.m.

Contacts Settings

Business Contact Categories

Business Contact Categories allow Agents to classify vendors for the Contacts and Leads window and for use as a trigger in Drip Marketing Campaigns.

Tip WOLFconnect comes equipped with a number of Business Contact Categories. Users are capable of editing and deleting these categories but cannot delete categories with Contacts or Leads assigned to them.

1. In the Navigation menu, click **Contact Management**. In the Contacts submenu, mouse-over the **Settings** icon and click **Business Content Categories**.

Adding a Business Contact Category

1. Click the **Add Entry** button.
2. Select a person or office to attach the category to using the **Person/Office Attached To** drop-down menu.
3. Enter a name for the category in the **Category Name** text field.
4. Enter a description for the category in the **Description** text field.
5. Click the **Save** button to save your changes or Cancel.

Editing a Business Contact Category

1. Click the desired **Business Contact Category**.
2. Edit the category as desired.
3. Click the **Save** button to save your changes or Cancel.

Deleting a Business Contact Category

Tip Only Business Contact Categories with no Contacts or Leads assigned to them can be deleted.

1. Click the desired **Business Contact Category**.
2. Click the **Delete** button.
3. A prompt will appear confirming category deletion. Click the **OK** button or Cancel.
4. Click the **Save** button to save your changes or Cancel.

LeadStreet Import

Tip LeadStreet is a function available only to RE/MAX ® clients.

LeadStreet allows importing of Leads from RE/MAX ® LeadStreet into WOLFconnect.

1. Log into LeadStreet.
2. Export LeadStreet Leads to a plain text file (.txt).
3. Within WOLFconnect, in the Navigation menu, click **Contact Management**. In the Contacts and Leads submenu, mouse-over the **Settings** icon . Click **Lead Street Import**.
4. Click the **Browse** button, select the plain text file (.txt) to import and click **Open**.
5. Click the **Add Lead Street** button.

Integrating brokerWOLF Contacts and Categories

brokerWOLF integrated clients can import Business Contacts and Categories into WOLFconnect.

1. In brokerWOLF, navigate to **E 1.1** – **Edit Company Profile**.
2. Click the **Interface** tab.
3. Select WOLFconnect from the **Integration Source** drop-down menu.
4. Click the **Configure** button.
5. Scroll down to Contacts options and enable **Export Contacts** by using the checkbox ☑.
6. Enter the number of records to be processed per batch by using the **No. of Records** text field.
7. Click the **Sync** button.
8. Click the **Store** button.
9. Click the **Exit** button.

brokerWOLF Business Contacts will now be available in WOLFconnect, sorted by the categories set in brokerWOLF and indicated by your Lone Wolf Customer Code.

Integrating WOLFconnect Sources of Business

Tip When Lead integration from WOLFconnect to brokerWOLF is enabled the Source of Business for each Lead is included in the record. This will allow a Transaction Record – 2.P.5.3 Sources of Business report to be run determining which sources of business generate the most revenue.

This will require mapping of brokerWOLF Sources of Business.

Mapping brokerWOLF Sources of Business

1. In brokerWOLF, navigate **E 1.1** – **Edit Company Profile**.
2. Click the **Interface** tab.
3. Select WOLFconnect from the **Integration Source** drop-down menu.
4. Click the **Configure** button.
5. Scroll down to Leads options and enable **Import Leads** by using the checkbox ☑.
6. Enter the number of days back brokerWOLF should go to import Leads by using the **Lead Days Back** text field.
7. Select **Sources of Business** from the drop-down menu at the top of the window.
8. For each WOLFconnect Source of Business, select the corresponding brokerWOLF **Source of Business** using the drop-down menus.
9. Click the **Store** button.
10. Click the **Exit** button.

CONTACT MANAGEMENT

RESOURCES | STO

CONTACTS AND LEADS

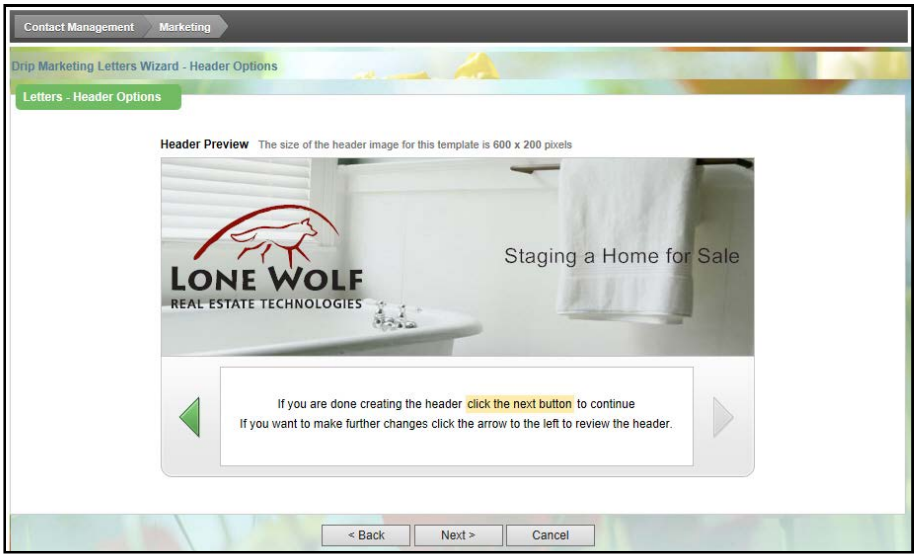
DRIP MARKETING

LONE WOLF WOLFconnect

Drip Marketing

Drip Marketing allows Administration and Agents to create drip marketing campaigns and letters to better communicate with potential customers. Contacts can be assigned to specific Campaigns as well.

Drip Marketing Letters



Drip Marketing Letter Creation

Creating Drip Marketing Letters

1. In the Navigation menu, click **Contact Management**. In the Marketing submenu, click **Campaigns**.
2. Click the **Letters** button.
3. Click the **Add Entry** button.
4. Select a template.
5. Click the **Next** button.
6. Enter a name for the letter in the **Letter Name** text field.
7. Enter the subject for the email in the **Email Subject** text field.
8. Select the type of user who will be able to use this letter in Drip Marketing campaigns using the radio buttons.
9. Click the **Next** button.

Company Logo

10. Click the **Right Arrow** .
11. Click the **Change Logo** button.
12. Click the **Upload Now** button.
13. Click the **Browse** button.
14. Select the logo to be used and click the **Open** button.
15. Click the **Upload** button.
16. Click the **Apply** button to save your changes or Cancel.
17. Click the **Right Arrow**.

Header Background

18. Click the **Background Color** button.
19. Use the colour selection tools to customize the colour.
20. Click the **OK** button.

Header Background Image

Tip Selecting a Background Image will override selection of a Background Colour.

21. Click the **Background Image** button.
22. Click the **Upload Now** button.
23. Click the **Browse** button.
24. Select the background to be used and click the **Open** button.
25. Click the **Upload** button.
26. Click the **Apply** button to save your changes or Cancel.
27. Click the **Right Arrow** ▶.

Header Text Colour

28. Enter a title for the letter in the **Title** text field.
29. Click the **Text Color** button.
30. Use the colour selection tools to customize the colour.
31. Click the **OK** button.
32. Click the **Next** button.

Letter Body

33. Enter body text for the letter.
34. Click the **Next** button.

Letter Footer

35. Select whether to display **No URL**, **Agent URL** or **Office URL** in the footer using the drop-down menu.
36. Select whether to display **No Phone Number**, **Agent Direct Number** or **Agent Mobile Number** in the footer using the drop-down menu.
37. Select whether or not to display **Real Estate License Number** in the footer using the drop-down menu.
38. Select **Left-**, **Centre-** or **Right-Alignment** for the footer.
39. Click the **Next** button.

Preview Letter

40. Click the **Preview Letter** button. This will open the letter in a new browser window. Confirm the look and content of the letter is what you have specified.

Tip Letters can be edited at any time in the Drip Marketing screen.

41. Click the **Save Letter** button.

Copying Existing Letters

Letters are often created by Administration for Agents but Agents often do not have the ability to edit letters due to user permission settings.

Tip See the User Roles section for more detail.

Agent letter customization can be accomplished by copying an existing letter and editing it using the same steps outlined in the Create Drip Marketing Letters section.

1. In the Navigation menu, click **Contact Management**. In the Marketing submenu, click **Campaign**.
2. Click **Letters**.
3. Click the **Copy Letter** icon for the desired letter.
4. A prompt will appear confirming letter copy. Click the **OK** button or Cancel.
5. Follow the steps outlined in the Create Drip Marketing Letters section.

Preview Existing Letters

1. In the Navigation menu, click **Contact Management**. In the Marketing submenu, click **Campaign**.
2. Click the **Letters** button.
3. Click the **Preview Letter** icon for the desired letter.
4. This will open the letter in a new browser window.

Drip Marketing Campaigns

Campaigns control which, when, and to whom Letters are sent.

Creating Drip Marketing Campaigns

1. In the Navigation menu, click **Contact Management**. In the Marketing submenu, click **Campaigns**.
2. Click the **Campaigns** button.
3. Click the **Add Entry** button.
4. Select the **Type of Campaign** using the radio buttons.

    Specific Dates – A Specific Date Campaign sends Letters on a Specific Date.

    Timeline – A Timeline Campaign sends Letters based on when a Contact is added to the Campaign or an Automatic Trigger.

5. Click the **Continue** button.
6. Enter a name for the campaign in the **Campaign Name** text field.
7. Select the type of user who will be able to use this Drip Marketing Campaign using the radio buttons.
8. Select a **Letter** to use in the Campaign using the drop-down menu. Add additional Letters by clicking the **Add Letter** button.

Tip Preview a chosen Letter by clicking the **Preview Letter** icon .

9. Select when to begin the Campaign.

    For Specific Date Campaigns, enter the date to send Letters using the calendar control.

    For Timeline Campaigns, enter the numbers of days after a Contact is added to the Campaign or an Automatic Trigger is triggered to send Letters.

10. Change the order of the Letters by using the up and down arrows.

Tip Delete a Letter from a Campaign by clicking the **Delete** icon .

Adding Contacts to a Campaign

Once a Campaign has been created, Contacts must be selected to receive the Drip Marketing Letters.

Add Contact

1. In the Navigation menu, click **Contact Management**. In the Marketing submenu, click **Campaigns**.
2. Click the **Campaigns** button.
3. Click the desired **Campaign**.
4. Click the **Contacts** tab.
5. Click the **Add Contact** button.
6. Select Client and Business Contacts and click the **Add** button to add the Contact to the Campaign. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
7. Click the **Save** button to save your changes or Cancel.

Tip Delete a Contact from the Campaign by clicking the **Delete** icon for the desired Contact.

Add Agent/Staff

1. In the Navigation menu, click **Contact Management**. In the Marketing submenu, click **Campaigns**.
2. Click the **Campaigns** button.
3. Click the desired **Campaign**.
4. Click the **Contacts** tab.
5. Click the **Add Agent/Staff** button.
6. Select Agents and Staff and click the **Add** button to add the Agent/Staff to the Campaign. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
7. Click the **Save** button to save your changes or Cancel.

Tip Delete Agents/Staff from the Campaign by clicking the **Delete** icon for the desired Agent/Staff.

Triggers

Triggers are criteria that need to be fulfilled for Contacts to be added to a Campaign automatically.

1. In the Navigation menu, click **Contact Management**. In the Marketing submenu, click **Campaigns**.
2. Click the **Campaigns** button.
3. Click the desired **Campaign**.
4. Click the **Contacts** tab.
5. Click the **Edit Triggers** button.
6. Select the trigger type from the **Type** drop-down menu.

Source of Business – When Contacts are added as Sources of Business they will be added to the Campaign.

Business Contact Category – When Contacts are added as a Business Contact they will be added to the Campaign.

Client Contact Category – When Contacts are added as a Client Contact they will be added to the Campaign.

Web Form – When a Web Form is submitted that Contact will be added to the Campaign.

Tip The Web Form option is available to globalWOLF clients only.

Agent/Staff – When Agents/Staff are added to WOLFconnect they will be added to the Campaign.

Distribution List – This Distribution List will be added to the Campaign.

7. Select the specific criteria for that Trigger Type from the **Specific** drop-down menu.
8. Add additional Triggers by clicking the **Add Trigger** button.
9. Click the **Save** button to save your changes or Cancel.

Tip Delete a Trigger from the Campaign by clicking the **Delete** icon.

Report Tab

The Report Tab displays all Contacts that have ever been added to the Campaign along with:

Start Date – The date the Contact was added to the Campaign

End Date – The date the Contact was removed from the Campaign

Letters – Number of Campaign Letters sent to the Contact

Tip Use the filter options to sort Contacts by Client, Business, etc.

Removing Contacts from a Campaign

1. In the Navigation menu, click **Contact Management**. In the Contacts and Leads submenu, click **Contacts**.
2. Click the desired **Contact**.
3. Click the **Drip Marketing Campaign** tab.
4. Click on the **toggle** for the desired Campaign to remove the contact from that Campaign.
5. A prompt will appear confirming removal. Click **OK** to confirm or Cancel.

Deleting Campaigns from Contact History

1. In the Navigation menu, click **Contact Management**. In the Contacts and Leads submenu, click **Contacts**.
2. Click the desired **Contact**.
3. Click the **Drip Marketing Campaign** tab.
4. Click the **Delete** icon .
5. A prompt will appear confirming deletion. Click **OK** to confirm or Cancel.

RESOURCES

| STORE

FILE MANAGER

BUSINESS DIRECTORY

File Manager

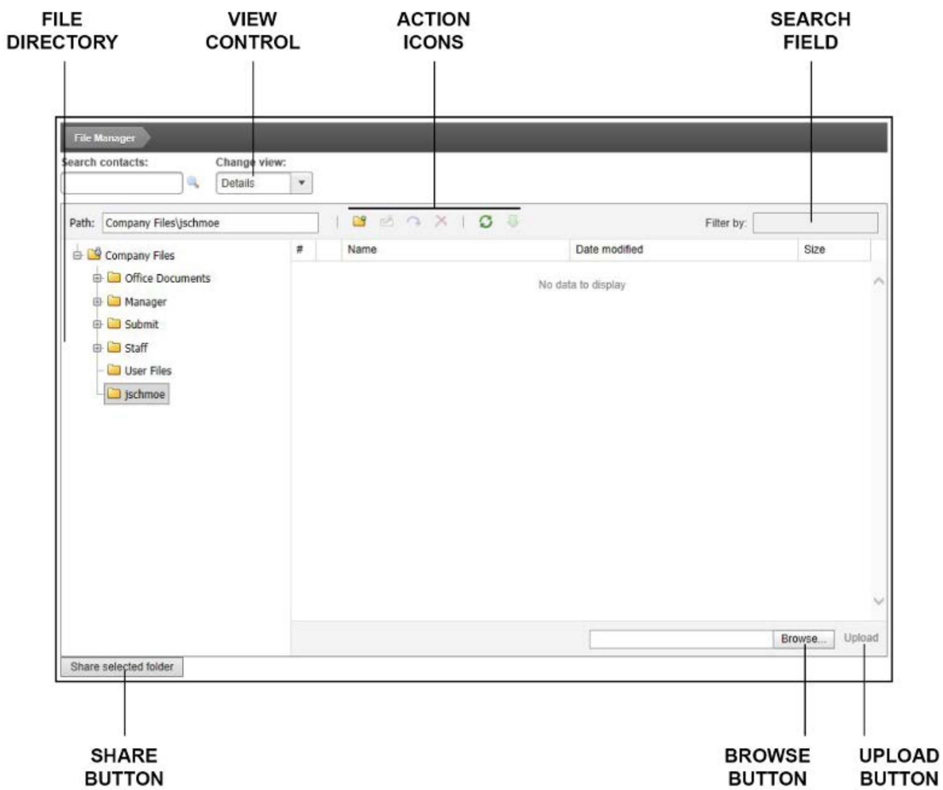
The File Manager is used as storage medium for commonly used company and personal files: the perfect place for forms, manuals and templates.

Up to 1 GB of data can be stored in File Manager by default. Contact the Lone Wolf Support Team to inquire about additional storage.

Tip Level of access to the File Manager depends on user permission level. See the User Roles section for more detail.

Accessing the File Manager

1. In the Navigation menu, click **Resources**. In the Files submenu, click **Manage**.



File Manager

Navigation of the File Manager works much like a typical file directory. Click the expand icon ⊞ to view subfolders and click the folder to view the contents.

Search User Folders

Administrators have the capability to search for User Files belonging to other Users.

1. Click the **Look-Up** icon and select the User.

(or)

1. Type the User's name in the **Search Contacts** text field and press the Enter key on the keyboard.

The User folder will appear as a subfolder within the User Files folder.

Search File Name

Users can search for specific file names using the **Filter By** text field.

Change Views

Change the file display view by using the **Change View** drop-down menu.

Tip Administrators will be unable to add, delete or move files to or from this folder.

Action Icons

Create - Create a folder or subfolder within the File Manager directory
Rename - Rename an existing file or folder
Move - Move an existing file or folder
Delete - Delete a file or folder

Creating Folders

1. Click the folder in which you want to create a subfolder.
2. Click the **Create** icon .
3. Enter a name for the folder in the text field and press the **Enter** key on the keyboard.

Tip Subfolders cannot be created in the Company Files folder but can be created in the existing subfolders within the Company Files folder.

Downloading Files

1. Double-click the file you want to download.

(or)

1. Select the file you want to download.
2. Click the **Download** icon .

Uploading Files

Tip Uploading files larger than 6 MB could result in slower load times.

1. Click the folder to which you want to upload the file.
2. Click the **Browse** button, select the file and click **Open**.

Tip Be aware that File Manager stores copies of original files. Do not delete the original.

Deleting Files

1. Select the file you want to delete.
2. Click the **Delete** icon ✕.
3. Click the **OK** button to confirm or Cancel.

Tip Files can be restored within 30 days of deletion. Note that restoring files to File Manager after 30 days is impossible.

Contact the Lone Wolf Support Team for assistance in restoring files.

Sharing Files and Folders

Adding a Folder Share

The File Manager has the capability to share folders with other WOLFconnect users.

1. Select the desired folder.
2. Click the **Share Selected Folder** button.
3. Click the **Add Share** button.
4. Select the level of access to give to the folder using the **Add**, **Delete** and **Subfolders** checkboxes ☑.

Tip **Add** allows file uploading, **Delete** allows file deletion and **Subfolders** allows subfolder creation.

5. Select the **Offices** you want to share with by using the checkbox.
6. Select the **Members** you want to share with by using the checkbox.

Tip De-selecting the **All** checkbox for Office or Member will display options to select individual Offices and Members.

7. Click the **Save** button to save your changes or Cancel.

Editing a Folder Share

1. Select the desired folder.
2. Click the **Share Selected Folder** button.
3. Click the **Edit** icon .
4. Edit the **Folder Share** as desired.
5. Click the **Save** button to save your changes or Cancel.

Deleting a Folder Share

1. Select the desired folder.
2. Click the **Share Selected Folder** button.
3. Click the **Delete** icon .
4. A prompt will appear confirming deletion. Click the **OK** button or Cancel.

Share URL

File Manager can share individual files by providing the URL to other WOLFconnect users.

1. Select the desired file.
2. Click the **Get File URL(s)** button.
3. Select and copy the URL.
4. Click the **Close** button.

RESOURCES

| STORE

FILE MANAGER

BUSINESS DIRECTORY

Business Directory

The Business Directory serves as a database of reputable businesses recommended by WOLFconnect users.

Configuring the Business Directory

Adding a Category

Before a business can be added to the Business Directory menu a Category must first be created.

Tip WOLFconnect comes with six Business Directory Categories by default: Appliances, Appraisers, Businesses and Professional Services, Home Cleaning Services, Home Maintenance and Website Solutions.

1. In the Navigation menu, click **Resources**. In the Business Directory submenu, click the **Settings** icon .
2. Click the **Add Entry** button.
3. Enter the **Category Name** in the text field.
4. Click the **Save** button to save your changes or Cancel.

Editing a Category

1. In the Navigation menu, click **Resources**. In the Business Directory submenu, click the **Settings** icon .
2. Click the desired **Category**.
3. Edit the Category as desired.
4. Click the **Save** button to save your changes or Cancel.

Deleting a Category

1. In the Navigation menu, click **Resources**. In the Business Directory submenu, click the **Settings** icon .
2. Click the desired **Category**.
3. Click the **Delete** button.
4. A prompt will appear confirming deletion. Click the **OK** button to confirm or Cancel.

Business Directory Entry

General Information

1. In the Navigation menu, click **Resources**. In the Business Directory submenu, click **Manage**.
2. Click the **Add Entry** button.
3. Click the **Categories** button.
4. Select **Categories** from the list and click the **Add** button to add that Category to the entry. Click the **Remove** button to remove them.
5. Click the **Assign** button to save your changes or Cancel.
6. Select if the entry will be appear on the Business Directory Landing Page by selecting the **Preferred** checkbox ☑.

7. Select if the entry will appear on the Office Website by selecting the **Show on Website** checkbox.

Tip This selection is only relevant to clients with a globalWOLF website.

8. Populate the remaining **Company Name** and **Contact Information**.
9. Click the **Save** button to save your changes or Cancel.
10. Click the **Upload Ad** button to upload a logo for the entry.

Contact Information

11. Click the **Contacts** tab.
12. Click the **Add Entry** button.
13. Enter relevant contact information for the Business Directory entry.
14. Click the **Save** button to save your changes or Cancel.

Ratings

15. Click the **Ratings** tab.
16. Click the **Add Entry** button.
17. Select the **Star Rating** for the entry (1 = Low Rating, 5 = High Rating).
18. Enter a comment for the Rating.
19. Click the **Save** button to save your changes or Cancel.

Editing an Entry

1. In the Navigation menu, click **Resources**. In the Business Directory submenu, click **Manage**.
2. Click the desired entry.
3. Edit the entry as desired.
4. Click the **Save** button to save your changes or Cancel.

Deleting an Entry

1. In the Navigation menu, click **Resources**. In the Business Directory submenu, click **Manage**.
2. Click the desired entry.
3. Click the **Delete** button.
4. A prompt will appear confirming deletion. Click the **OK** button to confirm or Cancel.

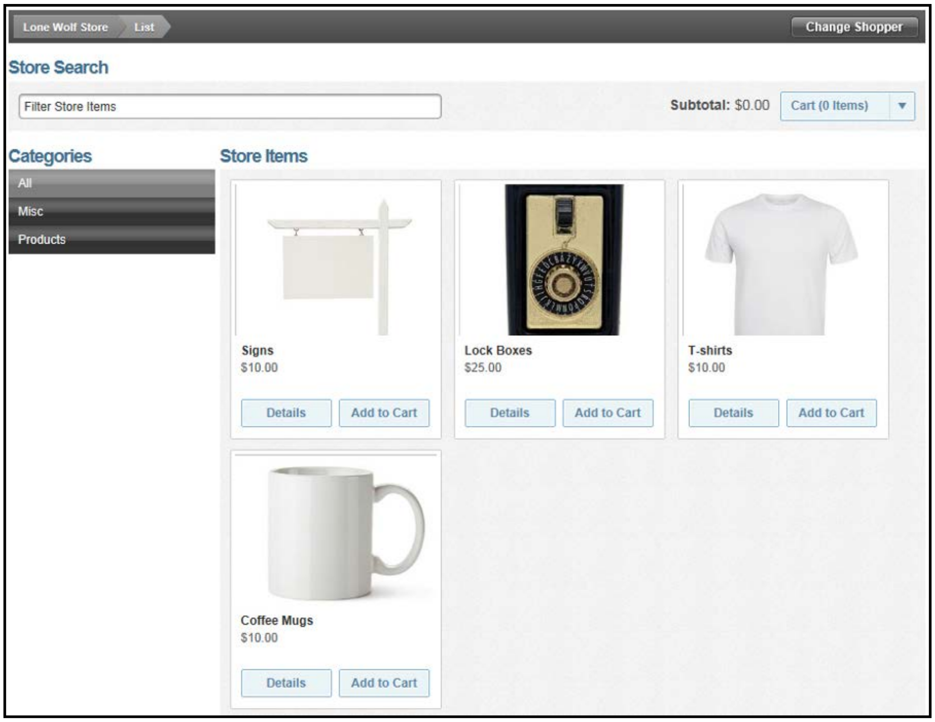
STORE

STORE DAY-TO-DAY

LONE WOLF WOLFconnect

Store Day-to-Day

The Store allows Agents and Staff to order signage and other branded items and makes a simple matter of order tracking and inventory management.



Store Window

Placing an Order

1. In the Navigation menu, click **Store**. In the LW Store menu, click **Store**.
2. Use the Search Bar to search for an Office or Agent. Only Offices or Agents existing in the WOLFtracks database can be selected.
3. Click the desired Office or Agent.

Tip Select another Office or Agent at any time within the Store by clicking the **Change Shopper** button. This will also clear the Cart.

4. Search for a Store Item using the Search Bar or click a Store Item Category to view specific Store Items.

Tip The Store Search searches all Store Item Categories and is not specific to the selected Store Item Category.

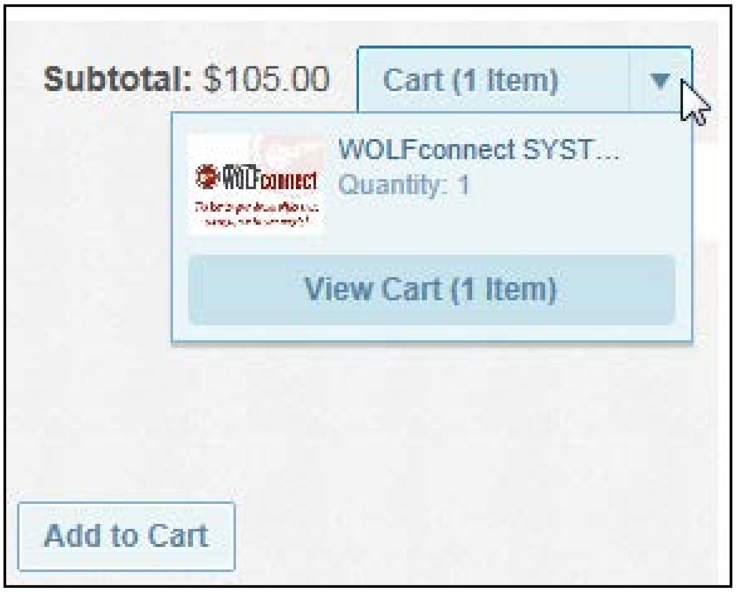
5. Click the **Details** button for the desired Store Item to view more detailed information.

Tip Click the **Add to Cart** button to add the item to your Cart without viewing its details.

6. Select a **Quantity**.
7. Click the **Add to Cart** button for the desired Store Item.

Tip

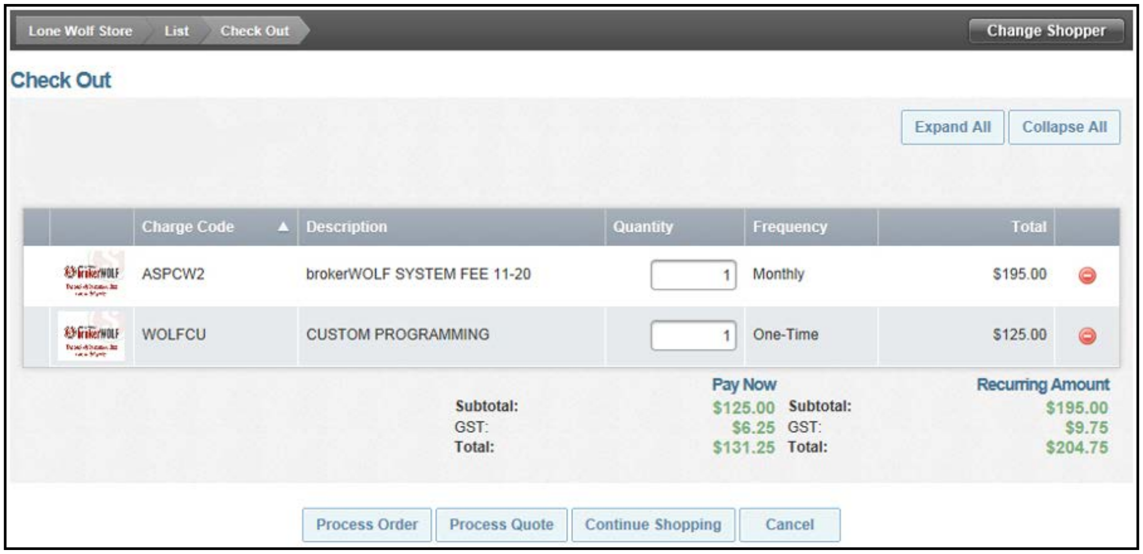
The Cart can be viewed at any time from the Cart drop-down menu.



Remove an item from the Cart drop-down menu by clicking the **Delete** icon .

8. Click the **Cart** button once all desired Store Items have been selected.

Cart



Store Cart

The Cart displays detailed billing information for the selected Store Items.

Charge Code

The Charge Code is used by Lone Wolf Real Estate Technologies to ensure accuracy when billing for Store purchases.

Description

The Description displays the Store Item name.

Quantity

Displays the quantity of the specific Store Item.

Frequency

Frequency displays the billing recurrence for the specific Store Item.

Total

Total Price for the specific Store Item.

Pay Now

Pay Now is the dollar amount due for setup and licensing fees once the Order is processed including taxes.

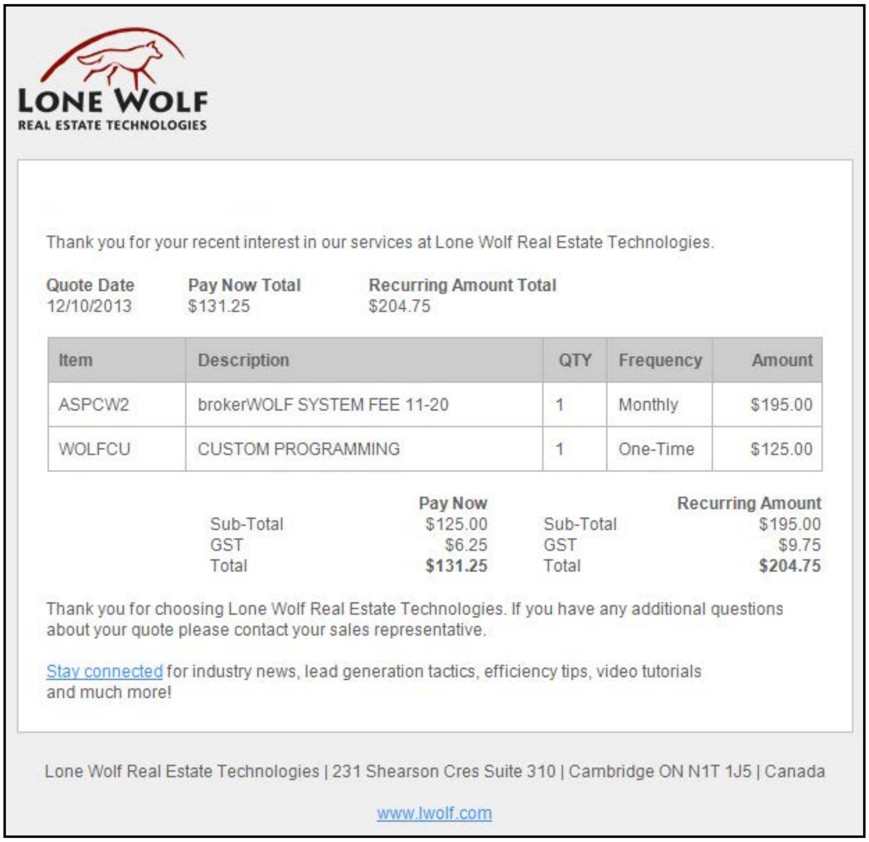
Recurring Amount

Recurring Amount is the dollar amount due on a recurring monthly basis once the Order is processed including taxes.

Processing a Quote

1. Click the **Process a Quote** button to preview an invoice before purchasing.

Tip Processing a Quote will clear the current Cart.


LONE WOLF
REAL ESTATE TECHNOLOGIES

Thank you for your recent interest in our services at Lone Wolf Real Estate Technologies.

Quote Date	Pay Now Total	Recurring Amount Total
12/10/2013	$131.25	$204.75

Item	Description	QTY	Frequency	Amount
ASPCW2	brokerWOLF SYSTEM FEE 11-20	1	Monthly	$195.00
WOLFCU	CUSTOM PROGRAMMING	1	One-Time	$125.00

	Pay Now		Recurring Amount
Sub-Total	$125.00	Sub-Total	$195.00
GST	$6.25	GST	$9.75
Total	**$131.25**	Total	**$204.75**

Thank you for choosing Lone Wolf Real Estate Technologies. If you have any additional questions about your quote please contact your sales representative.

Stay connected for industry news, lead generation tactics, efficiency tips, video tutorials and much more!

Lone Wolf Real Estate Technologies | 231 Shearson Cres Suite 310 | Cambridge ON N1T 1J5 | Canada

www.lwolf.com

2. A prompt will appear confirming completion of a quote. Click the **OK** button to confirm the quote or Cancel.
3. Enter an email address.
4. Click the **Send** button.

Tip Quotes can be sent to multiple email addresses.

Processing an Order

1. Click the **Process Order** button.

Tip If desired, click the **Order By Note** button to enter C/O or other relevant information to ensure accurate order processing and record keeping.

2. A prompt will appear confirming purchase. Click the **OK** button to confirm your purchase or Cancel.

WEBSITES

COMPANY LEVEL WEBSITE SETTINGS
globalWOLF AGENT WEBSITES
globalWOLF OFFICE WEBSITES
SEARCH ENGINE OPTIMIZATION
WEBSITE STATISTICS
globalWOLF SETTINGS

LONE WOLF WOLFconnect

Company Level Website Settings

Company Level Website Settings determine defaults for every level of globalWOLF website including Agent and Office. Configure Company Level Website Settings to ensure brand consistency throughout your company.

Tip Company Level Website Settings is the highest level in the globalWOLF Website Settings hierarchy. Configuring Office Website and New Agent Website default settings will override Company Level Website Settings.

Legend

The Legend provides instructions on how to edit module content.

1. Click the **Edit** icon for the desired module.
2. If desired, change the **Display Name**, **Hover** text and display window option.
3. Content can be customized further depending on the module.
4. Click the **Save** button to save your changes or Cancel.

Tip Delete a module by clicking the **Delete** icon .

System Web Pages

The System Web Pages tab allows content customization for any System Web Pages added to a website through the Navigation Menus tab.

1. Click the **System Web Pages** tab.
2. Click the desired web page.

Tip An Edit icon will indicate pages that can be customized.

3. Edit the content as desired using the **Legend** as a reference.
4. Click the **Save** button to save your changes or Cancel.

Custom Web Pages

Custom web pages can be created to have full control over the content of a web page.

1. Click the **Custom Web Pages** tab.
2. Click the **Add Entry** button.
3. Select to begin from a New Custom Page or a Company Custom Page template from the **Start From** drop-down menu.
4. Select if the page will be Active or Inactive from the **Active** drop-down menu.

Tip Select DELETE from the **Active** drop-down menu to delete the Custom Web Page.

5. Enter a **Name** for the Custom Web Page in the text field.
6. Customize the content in the **Custom Page Body**.

Tip Click the **HTML** icon to customize the HTML code of the Custom Web Page.

7. Click the **Save** button to save your changes or Cancel.

Tip Click the **Preview** button to view a preview of the Custom Web Page.

Website Content

The Website Content tab contains the default template, homepage content and privacy/terms used for newly created agent websites.

1. Click the **Website Content** tab.
2. Click the **Edit** icon for the desired content.

Website Template

This option sets the default template when creating new agent websites.

1. Click the **Select** button for the desired template.

Tip Click the **Preview** button to view a preview of the desired template.

2. From the drop-down menus in the **Content** column, select the content to display for the corresponding page.
3. Click the **Save** button to save your changes or Cancel.

Default Homepage Content

This option sets the default homepage content when creating new agent websites.

1. Customize the content in the text field and using the provided formatting tools.

Tip Click the **HTML** icon to customize the HTML code of the Default Homepage Content.

2. Click the **Save** button to save your changes or Cancel.

Website Footer

The Website Footer appears at the bottom of the website.

1. Edit the content as desired using the **Legend** as a reference.
2. Click the **Save** button to save your changes or Cancel.

Privacy/Terms

This option sets the default privacy and terms and conditions when creating new agent websites.

1. If desired, select the **Force users to read terms before submitting personal data** checkbox ☑.
2. Customize the content in the **Privacy Policy** text field.
3. Customize the content in the **Terms and Conditions** text field.

Tip Click the **HTML** icon to customize the HTML code of the Privacy Policy and Terms and Conditions.

Website Dynamic Content

Some website templates are designed with Dynamic Content areas which allow further customization. Dynamic Content is created in the Website Dynamic Content tab.

Creating and Editing Dynamic Content

1. Click the **Website Dynamic Content** tab.
2. Click the **Add Entry** button.
3. Select to begin from New Dynamic Content or a Company Dynamic Content template from the **Start From** drop-down menu.
4. Select if the page will be Active or Inactive from the **Active** drop-down menu.

Tip Select DELETE from the **Active** drop-down menu to delete the Custom Web Page.

5. Enter a **Name** for the Website Dynamic Content in the text field.
6. Customize the content in the **Dynamic Content Body**.

Tip Click the **HTML** icon to customize the HTML code of the Website Dynamic Content.

7. Click the **Save** button to save your changes or Cancel.

Tip Click the **Preview** button to view a preview of the Website Dynamic Content.

Inserting Dynamic Content

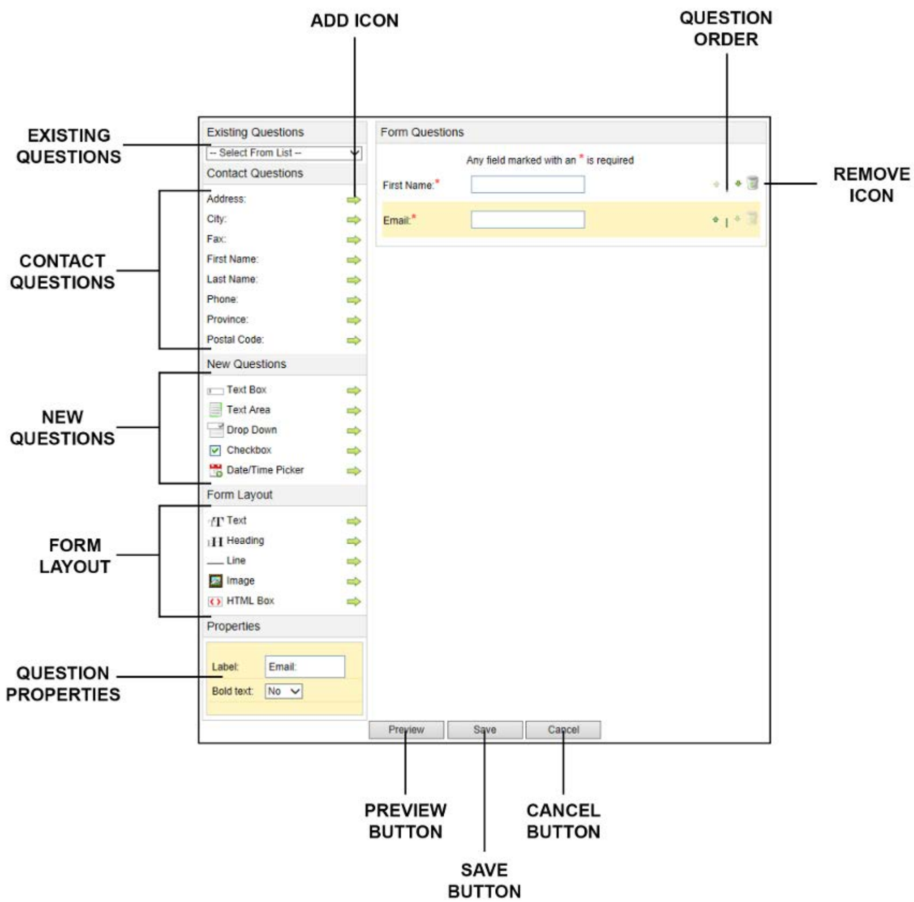
Once Dynamic Content is created it must be added to the desired website.

1. Click the **Navigation Menus** tab.
2. Click the **Select Template** button.
3. Click the **More Options** button for the currently selected template.
4. For the each Dynamic Content option, select the previously created Dynamic Content to use from the **Content** drop-down menu.
5. Click the **Save** button to save your changes or Cancel.

Web Forms

Websites use Web Forms to gather information from users visiting the site and can be used to distribute Leads.

Tip See the Contacts and Leads section for more detail.



Web Forms Window

1. Click the **Web Forms** tab.
2. Click the **Add Entry** button.
3. Select to begin from a New Custom Form or a Company Web Form template from the **Start From** drop-down menu.
4. Enter a **Name** for the Web Form in the text field.
5. Select how the form information will be used from the **Destination** drop-down menu:

- Lead Distribution – Form information will be distributed via typical Lead distribution protocol
- Lead for Agent – Form information will be provided as a Lead to the Agent who owns the website allowing the Agent to accept or decline the Lead
- Email Directly – Form information will be emailed directly to the Agent who owns the website

6. Click the **Add** icon for the desired form field.
7. Edit the form question as desired.

Tip Remove a form question by clicking the **Remove** icon. Change the order of the questions using the **up** and **down** arrows.

8. Click the **Save** button to save your changes or Cancel.

Existing Questions

Existing Questions are commonly asked questions pre-loaded for use by Lone Wolf.

Contact Questions

Contact Questions are contact information-specific fields such as Address, Phone Number, etc.

New Questions

The options available in New Questions allow creation of custom questions for the Web Form.

Form Layout

Options in Form Layout allow further customization of the Web Form. The options available here allow insertion of headings, lines, images, text and custom HTML code.

Properties

The Properties section allows customization of the selected form question.

Examples of the options available include the question label, bolding text, indicating a required field, etc.

Website Settings

1. Click the **Website Settings** tab.
2. Click the **Edit** icon for the desired module.

General Settings

1. Click the **General Settings** tab.

Company Settings

2. Select if new Listings will be featured from **Default New Listings as Featured** drop-down menu.
3. Select if only virtual tours for company-owned Listings will be displayed from the **Show Only Company Virtual Tours** drop-down menu.

4. Select whether to **Include MLS Open Houses** from the drop-down menu.

Tip This option only determines the display of Open House information for Listings included in board Listing feeds.

- For all listings – Open House information for all Listings included in board Listing feeds will be displayed
- For non-company listings – Only Open House information for non-company Listings included in board Listing feeds will be displayed
- For company listings – Only Open House information for company-owned Listings included in board Listing feeds will be displayed
- Do not include – No Open House information for Listings included in board Listing feeds will be displayed

5. Select if Agents can be searched for by Office from the **Show Office Search for Agents** drop-down menu.
6. Select if registration is required to view a listing address from the **Require Registration to View Listings Address** drop-down menu.
7. Select if registration is required to view listing details from the **Require Registration on View Listings Details** drop-down menu.
8. Select if registration is required to view virtual tours from the **Require Registration to View Virtual Tours** drop-down menu.
9. Select if new users will need to verify account creation from the **Require Email Verification for First Login** drop-down menu.

Tip Selecting Yes from the **Require Email Verification for First Login** drop-down menu is recommended.

10. If desired, enter the name of a third-party mortgage calculator in the **Mortgage Calculator Override Name** text field.

Tip globalWOLF provides a default mortgage calculator but third-party mortgage calculators can be used.

11. If desired, enter the URL of the third-party mortgage calculator in the **Mortgage Calculator Override URL** text field.

Tip “http://” must be entered for the link to work properly.

12. If desired, enter a description of the third-party mortgage company in the **Mortgage Company Title HTML** text field.

Tip The text entered here will appear above the mortgage calculator.

Listing Status Search Filters

Tip Listing Status Search Filters determine Listing statuses displayed on globalWOLF websites and are dependent on board regulations (eg. some boards do not allow sold listings to appear on websites).

13. Select IDX Listing statuses and click the **Add** button to include that IDX Listing status. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
14. Select Company Listing statuses and click the **Add** button to include that Company Listing status. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
15. Select Mapped Listing statuses and click the **Add** button to include that Mapped Listing status. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
16. Click the **Save** button to save your changes or Cancel.

Map Settings

The Map Settings section is used to set the physical location of the Agent's service area.

1. Drag and zoom the map using the mouse to the desired location.
2. Once the desired location is located, click the **Use Current Map Position** button.

Tip Click the **Show This Position** button to return to the location saved by clicking the Use Current Map Position button.

3. Click the **Save** button to save your changes or Cancel.

Tip Click the **Preview** button to view a preview of the map settings.

Awards/Designations

Creation and editing of Awards and Designations available for selection by Agents is done here.

1. Click the **Add Entry** button.
2. Enter a title for the Award/Designation in the **Name** text field.
3. Enter a **Description** in the text field.
4. Enter detailed information for the Award/Designation in the **Info** text field.
5. Click the **Save** button to save your changes or Cancel.

Tip Edit an Award/Designation by clicking the **Edit** icon . Delete an Award/Designation by clicking the **Edit** icon and clicking the **Delete** button.

MLS Area Names

MLS Area Names settings determine the board name displayed to globalWOLF website public users.

1. Click the **Edit** icon for the desired board.
2. Enter a **Public Name** in the text field.
3. Click the **Save** button to save your changes or Cancel.

WEBSITES

globalWOLF Agent Websites

globalWOLF allows Agents to create and manage their own websites, allowing Agents to administer their online brand with input from the Office.

New Agent Website Settings

New Agent Website Settings must be configured before new Agent websites can be configured. Settings configured in New Agent Website Settings will be applied to all newly created Agent websites.

Tip Only Administrators have access to New Agent Website Settings by default. See the Granting Access and User Roles section for more detail.

1. In the Navigation menu, click **Websites**. In the Websites submenu, click **Manage**.
2. Click the **New Agent Website Settings** button.

Navigation Menus

1. Click the **Navigation Menus** tab.

Tip Click the **Select Template** button to change the template the website is based on.

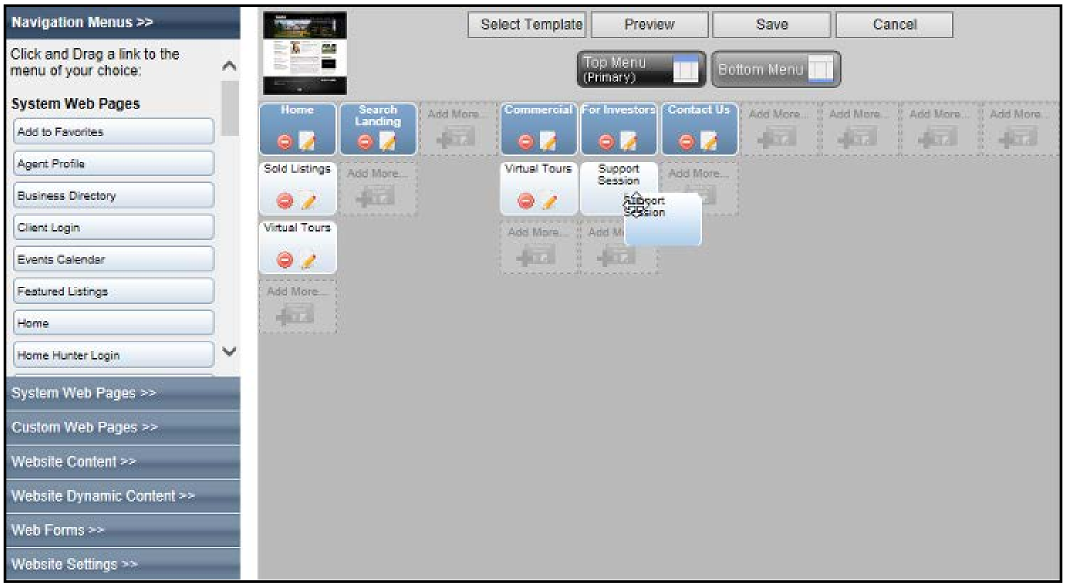
2. Click the **Top Menu** button.

Tip The Top Menu appears along the top of the website.

or

2. Click the **Bottom Menu** button.

Tip The Bottom Menu appears along the bottom of the website.



Navigation Menu Tab

3. Click and drag the desired menu options from the Navigation Menus tab to the right pane.
4. Click the **Save** button to save your changes or Cancel.

Edit Module Content

Certain individual modules can be edited to further customize the Agent website.

Legend

The Legend provides instructions on how to edit module content.

1. Click the **Edit** icon for the desired module.
2. If desired, change the **Display Name**, **Hover** text and display window option.
3. Content can be customized further depending on the module.
4. Click the **Save** button to save your changes or Cancel.

Tip Delete a module by clicking the **Delete** icon .

System Web Pages

The System Web Pages tab allows content customization for any System Web Pages added to a website through the Navigation Menus tab.

1. Click the **System Web Pages** tab.
2. Click the desired web page.

Tip An Edit icon will indicate pages that can be customized.

3. Edit the content as desired using the **Legend** as a reference.
4. Click the **Save** button to save your changes or Cancel.

Custom Web Pages

Custom web pages can be created to have full control over the content of a web page.

1. Click the **Custom Web Pages** tab.
2. Click the **Add Entry** button.
3. Select to begin from a New Custom Page or a Company Custom Page template from the **Start From** drop-down menu.
4. Select if the page will be Active or Inactive from the **Active** drop-down menu.

Tip Select DELETE from the **Active** drop-down menu to delete the Custom Web Page.

5. Enter a **Name** for the Custom Web Page in the text field.
6. Customize the content in the **Custom Page Body**.

Tip Click the **HTML** icon to customize the HTML code of the Custom Web Page.

7. Click the **Save** button to save your changes or Cancel.

Tip Click the **Preview** button to view a preview of the Custom Web Page.

Website Content

The Website Content tab contains the default template, homepage content and privacy/terms used for newly created agent websites.

1. Click the **Website Content** tab.
2. Click the **Edit** icon for the desired content.

Website Template

This option sets the default template when creating new agent websites.

1. Click the **Select** button for the desired template.

Tip Click the **Preview** button to view a preview of the desired template.

2. From the drop-down menus in the **Content** column, select the content to display for the corresponding page.
3. Click the **Save** button to save your changes or Cancel.

Default Homepage Content

This option sets the default homepage content when creating new agent websites.

1. Customize the content in the text field and using the provided formatting tools.

Tip Click the **HTML** icon to customize the HTML code of the Default Homepage Content.

2. Click the **Save** button to save your changes or Cancel.

Privacy/Terms

This option sets the default privacy and terms and conditions when creating new agent websites.

1. If desired, select the **Force users to read terms before submitting personal data** checkbox ☑.
2. Customize the content in the **Privacy Policy** text field.
3. Customize the content in the **Terms and Conditions** text field.

Tip Click the **HTML** icon to customize the HTML code of the Privacy Policy and Terms and Conditions.

Website Dynamic Content

Some website templates are designed with Dynamic Content areas which allow further customization. Dynamic Content is created in the Website Dynamic Content tab.

Creating and Editing Dynamic Content

1. Click the **Website Dynamic Content** tab.
2. Click the **Add Entry** button.
3. Select to begin from New Dynamic Content or a Company Dynamic Content template from the **Start From** drop-down menu.
4. Select if the page will be Active or Inactive from the **Active** drop-down menu.

Tip Select DELETE from the **Active** drop-down menu to delete the Custom Web Page.

5. Enter a Name for the **Website Dynamic Content** in the text field.
6. Customize the content in the **Dynamic Content Body**.

Tip Click the HTML icon to customize the HTML code of the Website Dynamic Content.

7. Click the **Save** button to save your changes or Cancel.

Tip Click the **Preview** button to view a preview of the Website Dynamic Content.

Inserting Dynamic Content

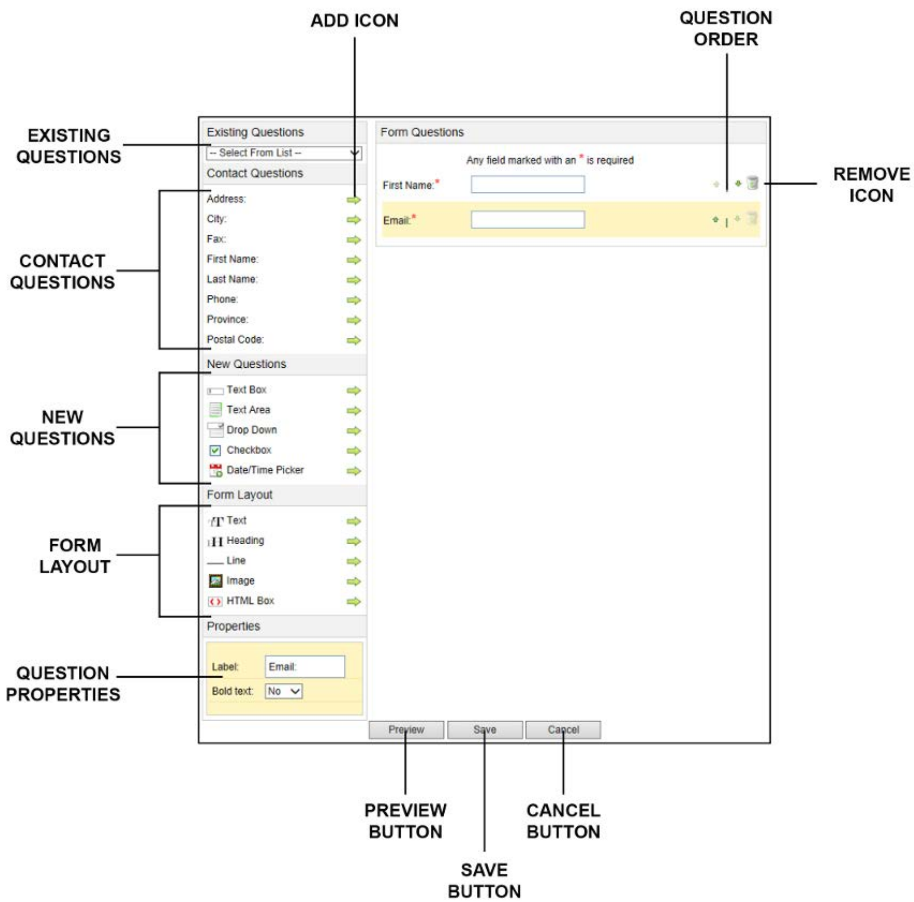
Once Dynamic Content is created it must be added to the desired website.

1. Click the **Navigation Menus** tab.
2. Click the **Select Template** button.
3. Click the **More Options** button for the currently selected template.
4. For the each Dynamic Content option, select the previously created Dynamic Content to use from the **Content** drop-down menu.
5. Click the **Save** button to save your changes or Cancel.

Web Forms

Websites use Web Forms to gather information from users visiting the site and can be used to distribute Leads.

Tip See the Contacts and Leads section for more detail.



Web Forms Window

1. Click the **Web Forms** tab.
2. Click the **Add Entry** button.
3. Select to begin from a New Custom Form or a Company Web Form template from the **Start From** drop-down menu.
4. Enter a **Name** for the Web Form in the text field.
5. Select how the form information will be used from the **Destination** drop-down menu:

- Lead Distribution – Form information will be distributed via typical Lead distribution protocol
- Lead for Agent – Form information will be provided as a Lead to the Agent who owns the website allowing the Agent to accept or decline the Lead
- Email Directly – Form information will be emailed directly to the Agent who owns the website

6. Click the **Add** icon for the desired form field.
7. Edit the form question as desired.

Tip Remove a form question by clicking the **Remove** icon. Change the order of the questions using the **up** and **down** arrows.

8. Click the **Save** button to save your changes or Cancel.

Existing Questions

Existing Questions are commonly asked questions pre-loaded for use by Lone Wolf.

Contact Questions

Contact Questions are contact information-specific fields such as Address, Phone Number, etc.

New Questions

The options available in New Questions allow creation of custom questions for the Web Form.

Form Layout

Options in Form Layout allow further customization of the Web Form. The options available here allow insertion of headings, lines, images, text and custom HTML code.

Properties

The Properties section allows customization of the selected form question.

Examples of the options available include the question label, bolding text, indicating a required field, etc.

Website Settings

1. Click the **Website Settings** tab.
2. Click the **Edit** icon for the desired module.

Map Settings

The Map Settings section is used to set the physical location of the Agent's service area.

1. Drag and zoom the map using the mouse to the desired location.
2. Once the desired location is located, click the **Use Current Map Position** button.

Tip Click the **Show This Position** button to return to the location saved by clicking the **Use Current Map Position** button.

3. Click the **Save** button to save your changes or Cancel.

Tip Click the **Preview** button to view a preview of the map settings.

Creating an Agent Website

Tip Only Agents have access to the New Website Wizard by default.

The New Website Wizard guides Agents through the website creation process.

Tip At any point during website creation, click the **Continue Later** button to skip template customization.

1. In the Navigation menu, click **Websites**. In the Websites submenu, click **Manage**.
2. Click the **New Website Wizard** button.

Step 1 of 8: Selecting a Template

3. A prompt will appear describing template selection. Click the **Close** button.
4. Click a template. A preview of the template will appear.

Tip Mouse-over a template to view details and features for that particular template.

5. Once the desired template is selected, click the **Next** button .

Step 2 of 8: Personal Information

6. A prompt will appear describing personal information entry. Click the **Close** button.
7. Populate the desired text fields.

Tip Depending on the chosen template, the preview may update as the text fields are populated.

8. Click the **Next** button .

Step 3 of 8: Homepage Content

Tip Depending on the chosen template, custom home page content may not be available.

9. A prompt will appear describing the function of the home page. Click the **Close** button.
10. If desired, click the **Change Content** button. This will allow entry of custom content for the website landing page.
11. Enter the desired content.
12. Click the **Close** button.
13. Click the **Next** button .

Step 4 of 8: Agent Profile

Tip The information entered here will appear in the Agent Profile on the Office website.

14. A prompt will appear describing the function of the agent profile information. Click the **Close** button.
15. If desired, enter custom content for the agent profile.
16. Click the **Next** button .

Step 5 of 8: Map Settings

17. A prompt will appear describing the function of the map settings step. Click the **Close** button.
18. Click the **Change Map Location** button.
19. Select the location using the map functions.
20. Once the desired location is set, click the **Use Current Map Position** button.

Tip Clicking the **Show This Position** button will bring the map back to the location selected with the Use Current Map Position button.

21. Click the **Close** button.
22. Click the **Next** button .

Step 6 of 8: Registration Settings

23. A prompt will appear describing the purpose of the registration settings. Click the **Close** button.
24. Select if registration is required to search listings from the **Require Registration to Search Listings** drop-down menu.
25. Select if registration is required to view a listing address from the **Require Registration to View Listings Address** drop-down menu.
26. Select if registration is required to view listing details from the **Require Registration on View Listings Details** drop-down menu.
27. Click the **Next** button .

Step 7 of 8: Search Engine Optimization

28. A prompt will appear describing search engine optimization. Click the **Close** button.

Tip Mouse-over the **Help** icon to view details of the particular field.

29. Enter a **Site Title** in the text field.
30. Enter keywords describing the website in the **Keywords** text field.

Tip Separate keywords by a comma.

31. Enter a description for the website in the **Description** text field.
32. Click the **Next** button .

Step 8 of 8: Preview and Go Live

33. A prompt will appear describing URL entry and the importance of the **Go Live** button. Click the **Close** button.
34. Enter a **Website URL** in the text field.

Tip The Website URL may be an existing domain name or a new domain name acquired through agentWOLF Domain Hosting Services. Ensure that the Website URL is registered and pointed to Lone Wolf servers.

or

34. Click the **Go Live** button.

Tip Note that there will be a fee for website activation. Contact your Office Administrator for details and access to the Go Live button.

35. A prompt will appear advising of monthly fees associated with website activation. Click the **OK** button to proceed or Cancel.
36. To confirm website activation, type “YES” into the text field.
37. Click the **OK** button.
38. Click the **Close** button.

Tip Click the **Edit Advanced Settings** button to go to the Website Settings for the newly created website. See the Agent Website Settings section for more detail.

Agent Website Settings

Website Settings configures the default settings for any website created for that particular Agent.

Tip Administrators have access to Website Settings by default while Agents only have access to the Website Settings for their own website. See the Granting Access and User Roles section for more detail.

1. In the Navigation menu, click **Websites**. In the Websites submenu, click **Manage**.
2. Click the **Agent Websites** button.
3. Use the filter options to narrow the search parameters.
4. Click the desired Agent.
5. Click the **Website Settings** button.

System Web Pages

The System Web Pages tab allows content customization for any System Web Pages added to a website through the Navigation Menus tab.

1. Click the **System Web Pages** tab.
2. Click the desired web page.

Tip An Edit icon will indicate pages that can be customized.

3. Edit the content as desired using the **Legend** as a reference.
4. Click the **Save** button to save your changes or Cancel.

Custom Web Pages

Custom web pages can be created to have full control over the content of a web page.

1. Click the **Custom Web Pages** tab.
2. Click the **Add Entry** button.
3. Select to begin from a New Custom Page or a Company Custom Page template from the **Start From** drop-down menu.
4. Select if the page will be Active or Inactive from the **Active** drop-down menu.

Tip Select DELETE from the **Active** drop-down menu to delete the Custom Web Page.

5. Enter a **Name** for the Custom Web Page in the text field.
6. Customize the content in the **Custom Page Body**.

Tip Click the **HTML** icon to customize the HTML code of the Custom Web Page.

7. Click the **Save** button to save your changes or Cancel.

Tip Click the **Preview** button to view a preview of the Custom Web Page.

Custom Web Links

Custom Web Links are used to create Navigation Menu items that link to external websites.

Tip Custom Web Links created here are available in the Navigation Menu tab when editing a website.

1. Click the **Custom Web Links** tab.
2. Click the **Add Entry** button.
3. Enter a **Link Name** in the text field.
4. Enter the **Link URL** in the text field.

Tip "http://" must be entered before the URL for the link to work properly.

5. Enter a **Description** for the link in the text field.
6. Select if the link is active from the **Link Active?** drop-down menu.
7. Click the **Save** button to save your changes or Cancel.

Tip Click the **Preview** button to preview the link.

Website Content

The Website Content tab contains the default template, homepage content and privacy/terms.

1. Click the **Website Content** tab.
2. Click the **Edit** icon for the desired content.

Marquee

The Marquee is displayed on the Agent website. Placement of the Marquee is dependent on the selected website template.

1. Customize the content in the text field and using the provided formatting tools.

Tip Click the **HTML** icon to customize the HTML code of the Default Homepage Content.

2. Click the **Save** button to save your changes or Cancel.

Auto Response

The Auto Response is sent to website users upon completion of a Web Form.

1. Customize the content in the text field and using the provided formatting tools.

Tip Click the **HTML** icon to customize the HTML code of the Default Homepage Content.

2. Click the **Save** button to save your changes or Cancel.

Website Footer

The Website Footer appears at the bottom of the website.

1. Edit the content as desired using the **Legend** as a reference.
2. Click the **Save** button to save your changes or Cancel.

Website Dynamic Content

Some website templates are designed with Dynamic Content areas which allow further customization. Dynamic Content is created in the Website Dynamic Content tab.

Creating and Editing Dynamic Content

1. Click the **Website Dynamic Content** tab.
2. Click the **Add Entry** button.
3. Select to begin from New Dynamic Content or a Company Dynamic Content template from the **Start From** drop-down menu.
4. Select if the page will be Active or Inactive from the **Active** drop-down menu.

Tip Select DELETE from the **Active** drop-down menu to delete the Custom Web Page.

5. Enter a **Name** for the Website Dynamic Content in the text field.
6. Customize the content in the **Dynamic Content Body**.

Tip Click the **HTML** icon to customize the HTML code of the Website Dynamic Content.

7. Click the **Save** button to save your changes or Cancel.

Tip Click the **Preview** button to view a preview of the Website Dynamic Content.

Inserting Dynamic Content

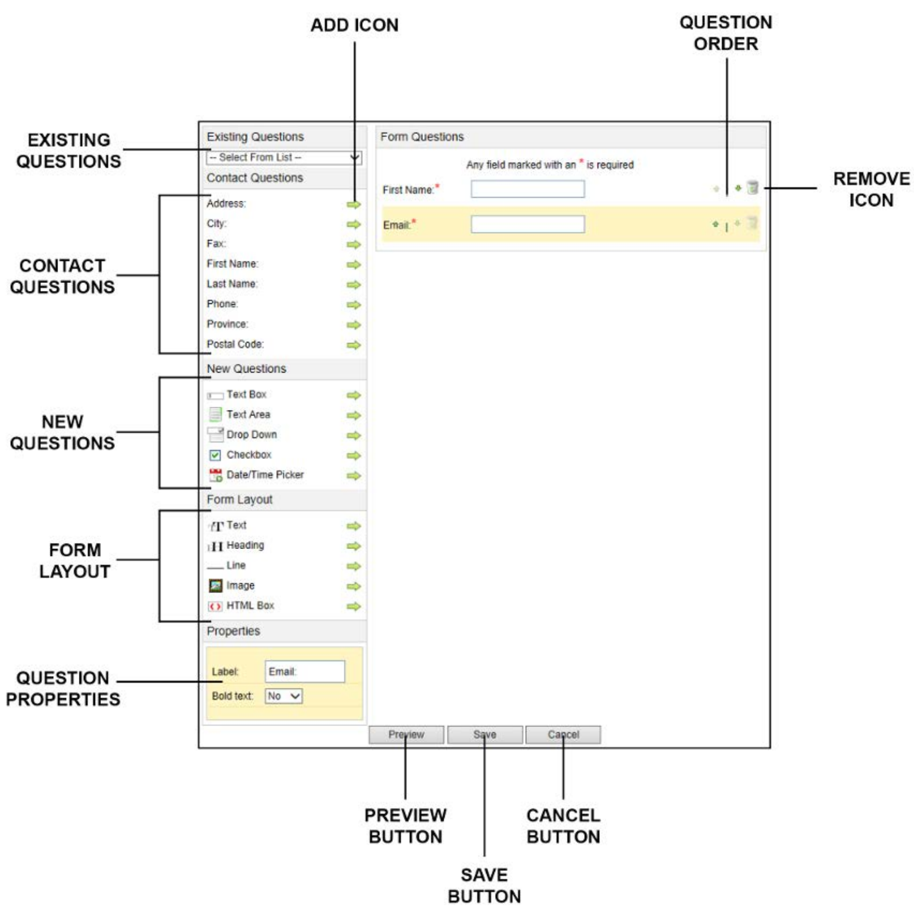
Once Dynamic Content is created it must be added to the desired website.

1. Click the **Navigation Menus** tab.
2. Click the **Select Template** button.
3. Click the **More Options** button for the currently selected template.
4. For the each Dynamic Content option, select the previously created Dynamic Content to use from the **Content** drop-down menu.
5. Click the **Save** button to save your changes or Cancel.

Web Forms

Websites use Web Forms to gather information from users visiting the site and can be used to distribute Leads.

Tip See the Contacts and Leads section for more detail.



Web Forms Window

1. Click the **Web Forms** tab.
2. Click the **Add Entry** button.
3. Select to begin from a New Custom Form or a Company Web Form template from the **Start From** drop-down menu.
4. Enter a **Name** for the Web Form in the text field.
5. Select how the form information will be used from the **Destination** drop-down menu:

- Lead Distribution – Form information will be distributed via typical Lead distribution protocol
- Lead for Agent – Form information will be provided as a Lead to the Agent who owns the website allowing the Agent to accept or decline the Lead
- Email Directly – Form information will be emailed directly to the Agent who owns the website

6. Click the **Add** icon for the desired form field.
7. Edit the form question as desired.

Tip Remove a form question by clicking the **Remove** icon. Change the order of the questions using the **up** and **down** arrows.

8. Click the **Save** button to save your changes or Cancel.

Existing Questions

Existing Questions are commonly asked questions pre-loaded for use by Lone Wolf.

Contact Questions

Contact Questions are contact information-specific fields such as Address, Phone Number, etc.

New Questions

The options available in New Questions allow creation of custom questions for the Web Form.

Form Layout

Options in Form Layout allow further customization of the Web Form. The options available here allow insertion of headings, lines, images, text and custom HTML code.

Properties

The Properties section allows customization of the selected form question.

Examples of the options available include the question label, bolding text, indicating a required field, etc.

Website Settings

1. Click the **Website Settings** tab.
2. Click the **Edit** icon for the desired module.

Awards/Designations

Awards and Designations selected here will appear under the Agent's name on Office websites and in the Agent's Profile on the Agent's website.

Tip The Awards and Designations available for selection are managed in Company Level Website Settings. See the Company Level Website Settings section for more detail.

1. Select an award from the **Pick an Award** drop-down menu.
2. Click the **Add Award to List** button.

Tip Remove an award from the list by clicking the **Remove** icon.

Personal Section

Information entered here will be displayed as links in the Agent's Profile on Agent and Office websites.

1. Click the **Add Entry** button.
2. Enter a **Title** in the text field.
3. Enter a **Description** in the text field.
4. Customize the content in the Info body.

Tip Click the **HTML** icon to customize the HTML code.

5. Click the **Save** button to save your changes or Cancel.

Global Website Settings

Information entered here will be displayed on the Office website on the Realtor Details page.

1. Populate the **Agent Profile** text field.
2. Enter the Agent's **Real Estate License** number in the text field.
3. Enter the Agent's **Auction License** number in the text field.
4. Enter the Agent's **Franchise Agent ID** in the text field.
5. Enter the Agent's **Business Website** address in the text field.

Tip "http://" must be entered before the URL for the link to work properly.

6. Enter the Franchise Website address in the **National Website** text field.
7. Enter a minimum listing price in the **Front Page Minimum Listing Price** text field.

Tip Enter "0" to display all featured Listings.

8. Select which featured listings to show from the **Show Featured Listings on Agent Websites** drop-down menu.
9. Select whether to hide or show the Agent's Office phone number from the **Hide Office Phone Number** drop-down menu.
10. Click the **Save** button to save your changes or Cancel.

WEBSITES

- COMPANY LEVEL WEBSITE SETTINGS
- globalWOLF AGENT WEBSITES
- **globalWOLF OFFICE WEBSITES**
- SEARCH ENGINE OPTIMIZATION
- WEBSITE STATISTICS
- globalWOLF SETTINGS

LONE WOLF WOLFconnect

globalWOLF Office Websites

globalWOLF allows each Office to have a unique website with Administrators able to control content for the Office and Agents within the Office.

Creating an Office Website

Tip Only Administrators have access to Office website creation.

1. In the Navigation menu, click **Websites**. In the Websites submenu, click **Manage**.
2. Click **Office Websites**.
3. Click the desired Office.
4. Click the **New Office Website** button.

Alias or Redirects

In cases where several domain names are registered to direct users to one website, use the Alias or Redirects option to ensure users always arrive at the correct destination.

Redirecting

When a user enters a URL they are redirected to another website with the address bar displaying the new URL.

Aliasing

When a user enters a URL they are redirected to another website, however the address bar displays the URL that was originally entered.

1. In the Navigation menu, click **Websites**. In the Websites submenu, click **Manage**.
2. Click **Office Websites**.
3. Click the desired Office.
4. Click the **Alias or Redirects** button.
5. Click the **Add Entry** button.
6. Enter a **New Website URL** in the text field.
7. Select Redirecting by entering a URL in the **Option 1** text field.

or

7. Select Aliasing by selecting a URL from the **Option 2** drop-down menu.

Tip Aliasing can only be accomplished using a previously configured domain name.

8. Click the **Save** button to save your changes or Cancel.

Office Website Settings

Office Website Settings configures the default settings for any website created for that particular Office.

1. In the Navigation menu, click **Websites**. In the Websites submenu, click **Manage**.
2. Click **Office Websites**.
3. Click the desired Office.
4. Click the desired website.

Navigation Menus

1. Click the **Navigation Menus** tab.

Tip Click the **Select Template** button to change the template the website is based on.

2. Click the **Top Menu** button.

Tip The Top Menu appears along the top of the website.

or

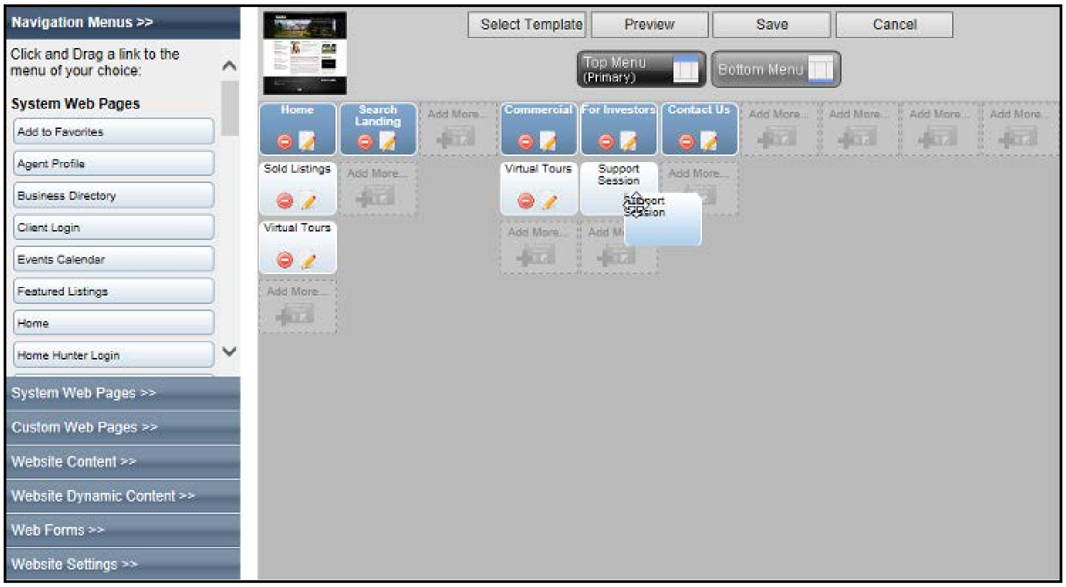
2. Click the **Bottom Menu** button.

Tip The Bottom Menu appears along the bottom of the website.

or

2. Click the Right Menu button.

Tip The Right Menu appears along the right side of the website.



Navigation Menus Window

3. Click and drag the desired menu options from the Navigation Menus tab to the right pane.
4. Click the **Save** button to save your changes or Cancel.

Edit Module Content

Certain individual modules can be edited to further customize the Agent website.

Legend

The Legend provides instructions on how to edit module content.

1. Click the **Edit** icon for the desired module.
2. If desired, change the **Display Name**, **Hover** text and display window option.
3. Content can be customized further depending on the module.
4. Click the **Save** button to save your changes or Cancel.

Tip Delete a module by clicking the **Delete** icon .

System Web Pages

The System Web Pages tab allows content customization for any System Web Pages added to a website through the Navigation Menus tab.

1. Click the **System Web Pages** tab.
2. Click the desired web page.

Tip An Edit icon will indicate pages that can be customized.

3. Edit the content as desired using the **Legend** as a reference.
4. Click the **Save** button to save your changes or Cancel.

Custom Web Pages

Custom web pages can be created to have full control over the content of a web page.

1. Click the **Custom Web Pages** tab.
2. Click the **Add Entry** button.
3. Select to begin from a New Custom Page or a Company Custom Page template from the **Start From** drop-down menu.
4. Select if the page will be Active or Inactive from the **Active** drop-down menu.

Tip Select DELETE from the **Active** drop-down menu to delete the Custom Web Page.

5. Enter a **Name** for the Custom Web Page in the text field.
6. Customize the content in the **Custom Page Body**.

Tip Click the **HTML** icon to customize the HTML code of the Custom Web Page.

7. Click the **Save** button to save your changes or Cancel.

Tip Click the **Preview** button to view a preview of the Custom Web Page.

Custom Web Links

Custom Web Links are used to create Navigation Menu items that link to external websites.

Tip Custom Web Links created here are available in the Navigation Menu tab when editing a website.

1. Click the Custom Web Links tab.
2. Click the Add Entry button.
3. Enter a Link Name in the text field.
4. Enter the Link URL in the text field.

Tip "http://" must be entered before the URL for the link to work properly.

5. Enter a **Description** for the link in the text field.
6. Select if the link is active from the **Link Active?** drop-down menu.
7. Click the **Save** button to save your changes or Cancel.

Tip Click the **Preview** button to preview the link.

Website Content

The Website Content tab contains the default template, homepage content and privacy/terms used for newly created agent websites.

1. Click the **Website Content** tab.
2. Click the **Edit** icon for the desired content.

Website Template

This option sets the default template when creating new agent websites.

1. Click the **Select** button for the desired template.

Tip Click the **Preview** button to view a preview of the desired template.

2. From the drop-down menus in the **Content** column, select the content to display for the corresponding page.
3. Click the **Save** button to save your changes or Cancel.

Marquee

The Marquee is displayed on the Agent website. Placement of the Marquee is dependent on the selected website template.

1. Customize the content in the text field and using the provided formatting tools.

Tip Click the **HTML** icon to customize the HTML code of the Marquee.

2. Click the **Save** button to save your changes or Cancel.

Disclaimer

The Disclaimer appears as a link in the website footer.

Tip Default disclaimer information is managed by Lone Wolf. Any addition disclaimer information entered here will appear after the default disclaimer.

1. Customize the content in the text field and using the provided formatting tools.

Tip Click the **HTML** icon to customize the HTML code of the Disclaimer.

2. Click the **Save** button to save your changes or Cancel.

Auto Response

The Auto Response is sent to website users upon completion of a Web Form.

1. Customize the content in the text field and using the provided formatting tools.

Tip Click the **HTML** icon to customize the HTML code of the Auto Response.

2. Click the **Save** button to save your changes or Cancel.

Website Header

The Website Header appears at the top of the website.

1. Customize the content in the text field and using the provided formatting tools.

Tip Click the **HTML** icon to customize the HTML code of the Website Header.

2. Click the **Save** button to save your changes or Cancel.

Website Footer

The Website Footer appears at the bottom of the website.

1. Edit the content as desired using the **Legend** as a reference.
2. Click the **Save** button to save your changes or Cancel.

Website Dynamic Content

Some website templates are designed with Dynamic Content areas which allow further customization. Dynamic Content is created in the Website Dynamic Content tab.

Creating and Editing Dynamic Content

1. Click the **Website Dynamic Content** tab.
2. Click the **Add Entry** button.
3. Select to begin from New Dynamic Content or a Company Dynamic Content template from the **Start From** drop-down menu.
4. Select if the page will be Active or Inactive from the **Active** drop-down menu.

Tip Select DELETE from the **Active** drop-down menu to delete the Custom Web Page.

5. Enter a **Name** for the Website Dynamic Content in the text field.
6. Customize the content in the **Dynamic Content Body**.

Tip Click the **HTML** icon to customize the HTML code of the Website Dynamic Content.

7. Click the **Save** button to save your changes or Cancel.

Tip Click the **Preview** button to view a preview of the Website Dynamic Content.

Inserting Dynamic Content

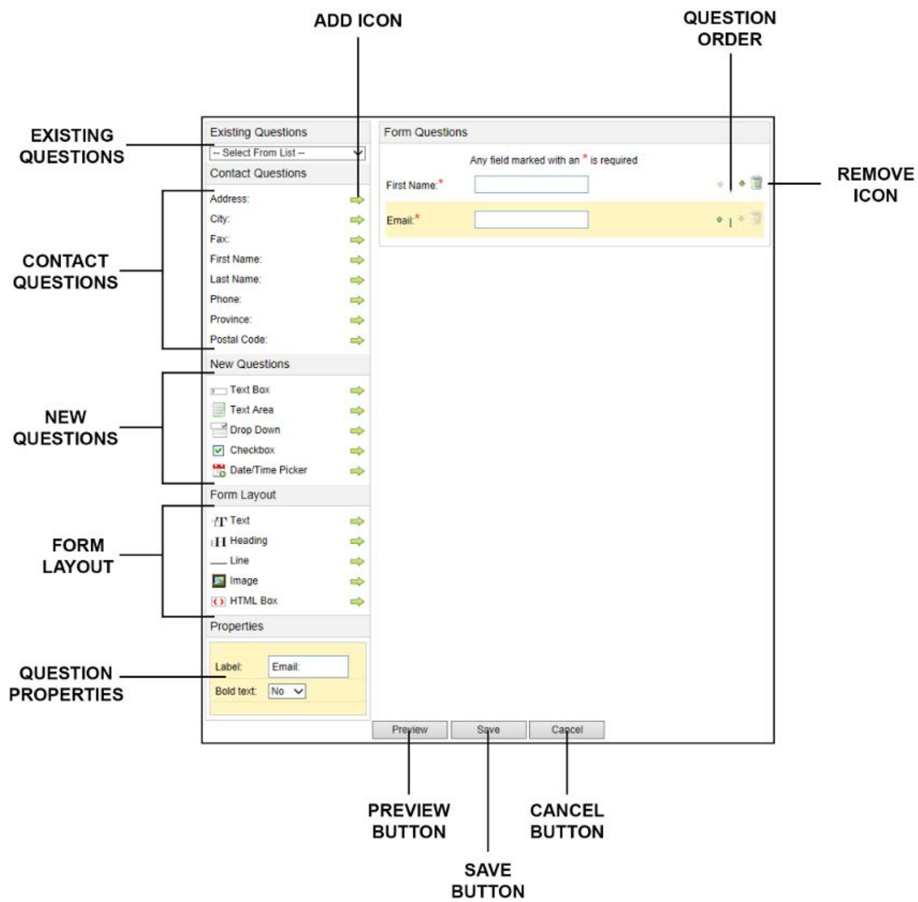
Once Dynamic Content is created it must be added to the desired website.

1. Click the **Navigation Menus** tab.
2. Click the **Select Template** button.
3. Click the **More Options** button for the currently selected template.
4. For the each Dynamic Content option, select the previously created Dynamic Content to use from the **Content** drop-down menu.
5. Click the **Save** button to save your changes or Cancel.

Web Forms

Websites use Web Forms to gather information from users visiting the site and can be used to distribute Leads.

Tip See the Contacts and Leads section for more detail.



Web Forms Window

1. Click the **Web Forms** tab.
2. Click the **Add Entry** button.
3. Select to begin from a New Custom Form or a Company Web Form template from the **Start From** drop-down menu.
4. Enter a **Name** for the Web Form in the text field.
5. Select how the form information will be used from the **Destination** drop-down menu:

- Lead Distribution – Form information will be distributed via typical Lead distribution protocol
- Lead for Agent – Form information will be provided as a Lead to the Agent who owns the website allowing the Agent to accept or decline the Lead
- Email Directly – Form information will be emailed directly to the Agent who owns the website

6. Click the **Add** icon for the desired form field.
7. Edit the form question as desired.

Tip Remove a form question by clicking the **Remove** icon. Change the order of the questions using the **up** and **down** arrows.

8. Click the **Save** button to save your changes or Cancel.

Existing Questions

Existing Questions are commonly asked questions pre-loaded for use by Lone Wolf.

Contact Questions

Contact Questions are contact information-specific fields such as Address, Phone Number, etc.

New Questions

The options available in New Questions allow creation of custom questions for the Web Form.

Form Layout

Options in Form Layout allow further customization of the Web Form. The options available here allow insertion of headings, lines, images, text and custom HTML code.

Properties

The Properties section allows customization of the selected form question.

Examples of the options available include the question label, bolding text, indicating a required field, etc.

Website Settings

1. Click the **Website Settings** tab.
2. Click the **Edit** icon for the desired module.

MLS

All Office MLS IDs must be entered in order to update Listing information on websites.

1. Select the **MLS Board** from the drop-down menu.

Tip Click the **Look up** button to verify board information once an MLS Board has been selected.

2. Enter the **MLS Office ID** in the text field.
3. Click the **Add** button.

Tip Remove an MLS Board from the Office website by clicking the **Delete** icon.

Office Visibility

Offices that are included are included for the purpose of Contact Information and Agent lists.

Tip To include Offices for Listing data see the MLS section for more detail.

1. Select individual Offices and click the **Add** button to add that user to the Included Offices. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
2. Click the **Save** button to save your changes or Cancel.

General Settings

1. Click the **General Settings** tab.

Add-on Functionality

2. Select whether to Enable or Disable the **Mobile Site** from the drop-down menu.

URL Settings

3. Select whether to display Office or Company **Contact Information** from the drop-down menu.
4. Select whether to display Agent contact/photo/Office information pulled from Web Manager Profiles or internal WOLFconnect Agent Profiles from the **Agent Profiles** drop-down menu.
5. Select when to display the Agent List from the **Show list of Agents on Agent List** drop-down menu.
6. Activate/deactivate the Office website by clicking the **WebSite Active?** button.
7. Select whether the website will be framed by a third-party template from the **Web Page Framed?** drop-down menu.
8. Select whether registration is required to search Listings from the **Require Registration to Search Listings** drop-down menu.
9. Select whether registration is required to view Listing addresses from the **Require Registration to View Listings Address** drop-down menu.
10. Select whether registration is required to view Listing details from the **Require Registration to View Listings Details** drop-down menu.
11. Select the number of Listings viewable before registration from the **Allow to see before registration** drop-down menu.
12. Select whether registration is required to view virtual tours from the **Require Registration on View Virtual Tours** drop-down menu.
13. Enter a **Website Name** in the text field.

Tip The Website Name entered here will appear at the top of the browser window when visiting the Office website.

Office URL Photo

The default image displayed here is the image selected in the Office Profile. See the Adding an Office Photo section for more detail.

14. Select the **Override Office Photo** checkbox ☑.
15. Click the **Browse** button, select an image and click **Open**.
16. Click the **Save** button to save your changes or Cancel.

Map Settings

The Map Settings section is used to set the physical location of the Agent’s service area.

1. Drag and zoom the map using the mouse to the desired location.
2. Once the desired location is located, click the **Use Current Map Position** button.

Tip Click the **Show This Position** button to return to the location saved by clicking the Use Current Map Position button.

3. Click the **Save** button to save your changes or Cancel.

Tip Click the **Preview** button to view a preview of the map settings.

SEO Defaults

Tip See the Search Engine Optimization section for more detail.

Web Statistics

The Web Statistics tab allows entry of Google Analytics and VisiStat account information.

Office Website Publishing

Tip Office Website Settings should be configured fully before attempting to publish a website. See the Office Website Settings section for more detail.

1. In the Navigation menu, click **Websites**. In the Websites submenu, click **Manage**.
2. Click **Office Websites**.
3. Click the desired Office.
4. Click the desired website.
5. Click the **Go Live** GO LIVE button.
6. Select the **New Website** radio button and enter the URL for the new website.

or

6. Select the radio button for an existing website URL.
7. Click the **Continue** button.
8. A prompt will appear confirming publish. Click the **OK** button to confirm or Cancel.

Tip Once the website has been published in WOLFconnect, Domain Name Server (DNS) settings will need to be configured with the domain name registrar (i.e. www.agentwolfdomains.com), to point to the Lone Wolf Name Servers.

WEBSITES

Search Engine Optimization (SEO)

Search Engines like Google, Yahoo or Bing search for websites using specific keywords and phrases. globalWOLF allows customization of search terms ensuring optimal visibility to search engine users.

Tip Access to SEO functions is dependent on user permissions and users can only configure SEO for information they already have access to. See the Granting Access and User Roles section for more detail.

SEO Indicator

The SEO Indicator is a measure of the level of SEO configuration on that particular web page.

Tip Click the SEO Indicator to navigate to configure SEO for the web page.

SEO has not been configured

SEO has been configured at a higher website settings level

SEO has been configured at the currently selected website settings level

Setting SEO Defaults

The SEO Defaults will configure the default SEO settings for all websites for the selected level (Office or Agent).

1. In the Navigation menu, click **Websites**. In the Websites submenu, click **Manage**.
2. Click **Agent Websites**.

or

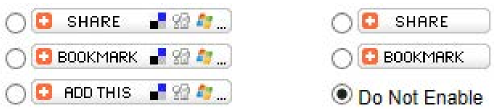
2. Click **Office Websites**.
3. Click the desired website, Office or Agent.
4. Click the **Website Settings** tab.
5. Click the **Edit** icon for **SEO Defaults**.
6. Enter a **Site Title** in the text field.
7. Enter **Meta Keywords** in the text field.

Tip Meta Keywords are words used to describe the website. These keywords should match words used by users when searching for the website as closely as possible. Separate keywords by a comma. There is a 250 character maximum to this text field.

8. Enter a **Meta Description** in the text field.

Tip The Meta Description is the description of the website as it appears in a search engine results page. There is a 500 character maximum to this text field.

9. Copy the content section of the meta tag provided by Google into the **Google Verification** text field.
10. Copy the content section of the meta tag provided by Bing into the **Bing Verification** text field
11. Copy the content section of the meta tag provided by Yahoo into the **Yahoo Verification** text field.
12. Select a **Social Networking** option using the radio buttons.



Tip The Social Networking options allow users to share website information on their favorite social networking site.

13. Click the **Save** button to save your changes or Cancel.

Configuring Specific SEO

SEO Defaults can be configured for specific web pages as well.

Listings

SEO on Listings is automatically set with information entered when the Listing was created however SEO can be edited or enhanced to increase visibility.

1. In the Navigation menu, click **Real Estate**. In the Listings submenu, click **Manage**.
2. Click the desired Listing.
3. Click the **SEO Indicator**.

Tip A green SEO Indicator means the SEO has already been customized. A yellow SEO Indicator means the Listing is already following default SEO settings. A red SEO Indicator means the Listing has no SEO settings configured, drastically reducing its visibility.

4. Enter an **SEO Title** in the text field. This appears as the name of the page in web browsers and is a mandatory field. Default information includes the Address, City, State/Province, MLS # and MLS Area.
5. If desired, enter an **SEO URL Translation** in the text field. This simplifies the URL address.

Tip Only alphanumeric characters, dashes and periods can be used in this field.

6. If desired, enter **SEO Keywords** in the text field.

Tip SEO Keywords are words used to describe the Listing. These keywords should match words used by users when searching for Listings as closely as possible. Separate keywords by a comma. There is a 250 character maximum to this text field.

7. Enter an **SEO Description** in the text field. This is a mandatory field. Default information includes remarks received by the Board or will include the Feature Description if the Listing has been enhanced. See the Enhance a Listing section for more detail.

Tip The SEO Description is the description of the website as it appears in a search engine results page. There is a 500 character maximum to this text field.

8. Click the **Save** button to save your changes or Cancel.

Tip Once SEO is saved for a Listing the SEO Indicator will appear green.

Custom and System Web Pages and Web Forms

SEO Defaults will apply when Custom and System Web Pages and Web Forms are created but can be customized.

Tip If a Custom Web Page or Web Form is being created it must first be saved before configuring SEO.

1. In the Navigation menu, click **Websites**. In the Websites submenu, click **Manage**.
2. Enter the desired Website Settings.

Tip SEO configuration follows Website Setting hierarchy: Company Level Settings down to Office Website Settings down to New Agent Website Settings down to specific Agent Website Settings however SEO can be customized at any setting level.

3. Click the **System Web Pages**, **Custom Web Pages** or **Web Forms** tab.
4. Click the **Edit** icon for the desired content.
5. Click the **SEO Indicator**.

Tip A green SEO Indicator means the SEO has already been customized. A yellow SEO Indicator means the page is already following default SEO settings. A red SEO Indicator means the page has no SEO settings configured, drastically reducing its visibility.

6. Enter an **SEO Title** in the text field. This appears as the name of the page in web browsers and is a mandatory field.
7. If desired, enter an SEO URL Translation in the text field. This simplifies the URL address.

Tip Only alphanumeric characters, dashes and periods can be used in this field.

8. If desired, enter **SEO Keywords** in the text field.

Tip SEO Keywords are words used to describe the page. These keywords should match words used by users when searching as closely as possible. Separate keywords by a comma. There is a 250 character maximum to this text field.

9. Enter an **SEO Description** in the text field. This is a mandatory field.

Tip The SEO Description is the description of the website as it appears in a search engine results page. There is a 500 character maximum to this text field.

10. Click the **Save** button to save your changes or Cancel.

Search Definitions

SEO for Search Definitions can be customized to give users the tools required to find their dream home. For example, a Search Definition of “Detached” can be further customized to differentiate between “Fully Detached”, “Partial Detached” or detached homes within a specific area or neighborhood.

Tip If a Search Definition is being created it must first be saved before configuring SEO.

1. In the Navigation menu, click **Websites**. In the Websites submenu, mouse-over the **Settings** icon and click **Search Definitions**.
2. Click the desired Search Definition.
3. Click the **SEO Indicator**.

Tip A green SEO Indicator means the SEO has already been customized. A yellow SEO Indicator means the Listing is already following default SEO settings. A red SEO Indicator means the Listing has no SEO settings configured, drastically reducing its visibility.

4. Enter an **SEO Title** in the text field. This appears as the name of the page in web browsers and is a mandatory field.
5. If desired, enter an **SEO URL Translation** in the text field. This simplifies the URL address.

Tip Only alphanumeric characters, dashes and periods can be used in this field.

6. If desired, enter **SEO Keywords** in the text field.

Tip SEO Keywords are words used to describe the Search Definition. These keywords should match words used by users when searching as closely as possible. Separate keywords by a comma. There is a 250 character maximum to this text field.

7. Enter an **SEO Description** in the text field. This is a mandatory field.

Tip The SEO Description is the description of the Search Definition as it appears in a search engine results page. There is a 500 character maximum to this text field.

8. Click the **Save** button to save your changes or Cancel.

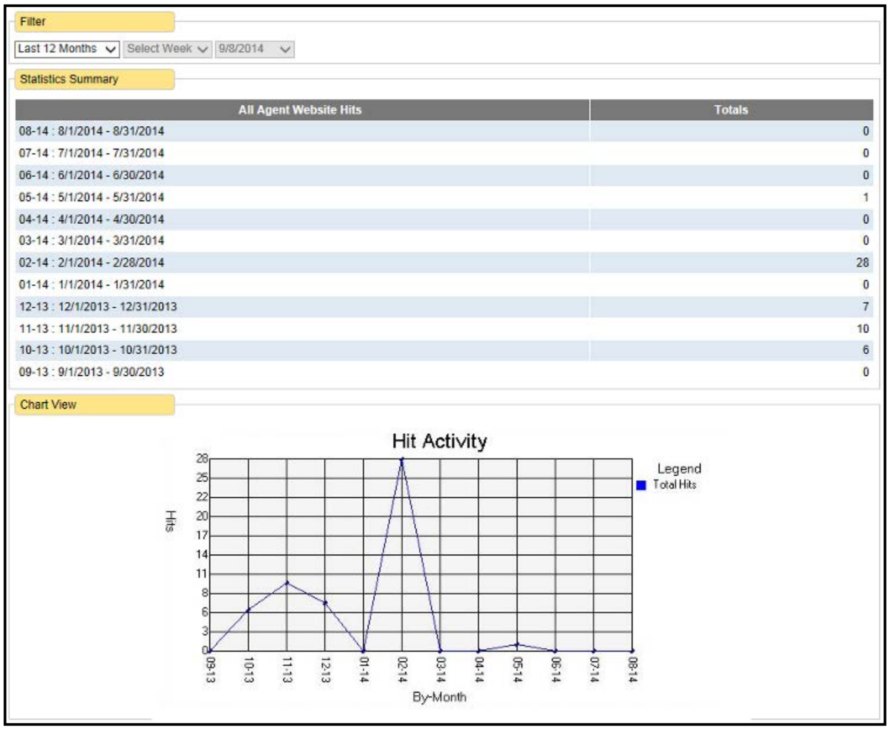
WEBSITES

LONE WOLF WOLFconnect

Web Statistics

Accessing globalWOLF Web Statistics

1. In the Navigation menu, click **Websites**. In the Website Statistics submenu, click **Company URL Stats**.
2. Click **“Stats”** for the desired website.



All Agent Website Hits	Totals
08-14 : 8/1/2014 - 8/31/2014	0
07-14 : 7/1/2014 - 7/31/2014	0
06-14 : 6/1/2014 - 6/30/2014	0
05-14 : 5/1/2014 - 5/31/2014	1
04-14 : 4/1/2014 - 4/30/2014	0
03-14 : 3/1/2014 - 3/31/2014	0
02-14 : 2/1/2014 - 2/28/2014	28
01-14 : 1/1/2014 - 1/31/2014	0
12-13 : 12/1/2013 - 12/31/2013	7
11-13 : 11/1/2013 - 11/30/2013	10
10-13 : 10/1/2013 - 10/31/2013	6
09-13 : 9/1/2013 - 9/30/2013	0

Website Statistics

Web Statistics Settings

1. In the Navigation menu, click **Websites**. In the Websites submenu, click **Manage**.
2. Click **Office Websites**.

or

2. Click **Agent Websites**.
3. Click the desired Office or Agent.
4. Click the desired website.
5. Click the **Website Settings** tab.
6. Click the **Edit** icon for **Web Statistics**.

Google Analytics

Google Analytics is a free service with features like advanced segmentation, motion charts, custom reports and more (to view more features visit **http://www.google.com/analytics/features.html**).

1. Visit **http://www.google.com/analytics/web/provision**.
2. Click the **Sign up** button.
3. Enter an **Account Name** in the text field.
4. Enter a **Website Name** in the text field.
5. Enter the **Website URL** in the text field.
6. Enter other information as desired.
7. Click the **Get Tracking ID** button.
8. A prompt will appear containing Google Analytics terms of service. Click the **I Accept** button.
9. Copy the Tracking ID (eg. UA-#######-#).
10. In WOLFconnect, access the **Web Statistics** settings for the desired website.
11. Enter the Tracking ID in the **Analytics ID** text field.
12. Select the desired setting from the **Universal Analytics** drop-down menu.
13. Click the **Save** button to save your changes or Cancel.

VisiStat

There is a fee for using VisiStat and the price depends on the chosen package. VisiStat offers a free 7-day full-featured trial.

All packages offer analytic reports and account data, trending and mapping reports, visitor traffic reports, clickpath and page exit data and a live time desktop data viewer.

1. Visit **http://www.visistat.com**.
2. Click the **Free Trial** button.
3. Enter the **Website (URL)** in the text field.
4. Select the **Time Zone** from the drop-down menu.
5. Enter a **Password** in the text field.
6. Enter **General Information** as desired.
7. Select the **I agree** checkbox ☑.
8. Click the **Let's Try This!** Button.
9. Copy the Digital ID (eg. 2#####).

```
<!--VISISTAT SNIPPET//-->
<script type="text/javascript">
//<![CDATA[
var DID=238084;
var pcheck=(window.location.protocol == "https:") ? "https://sniff.visistat.com/live.js":"http://stats.visistat.com/live.js";
document.writeln('<scr'+'ipt src="'+pcheck+'" type="text\/javascript"><\/scr'+'ipt>');
//]]>
</script>
<!--VISISTAT SNIPPET//-->
```

VisiStat DID Lookup

10. In WOLFconnect, access the **Web Statistics** settings for the desired website.
11. Enter the Digital ID in the **Digital ID** text field.
12. Enter your VisiStat **User Name** in the text field.
13. Enter your VisaStat **Password** in the text field.
14. Click the **Save** button to save your changes or Cancel.

WEBSITES

COMPANY LEVEL WEBSITE SETTINGS
globalWOLF AGENT WEBSITES
globalWOLF OFFICE WEBSITES
SEARCH ENGINE OPTIMIZATION
WEBSITE STATISTICS
globalWOLF SETTINGS

globalWOLF Settings

globalWOLF Settings allows creation and editing of search definitions, URL redirection and management of website fees.

Search Definitions

Each globalWOLF website comes with a default Search Definition that is attached to the Property Search and Home Hunter functions. Multiple globalWOLF websites can use the same default Search Definition.

Tip The default Search Definition will not narrow the results by board, Office, Agent, etc. and will typically result in the entire pool of Listings.

Search Definitions can be created and customized giving users a more streamlined property search experience.

Creating a Search Definition

1. In the Navigation menu, click **Websites**. In the Websites submenu, mouse-over the **Settings** icon and click **Search Definitions**.
2. Click the **Add Entry** button.
3. Select who the Search Definition will be available to from the **Available For** drop-down menu.

- Company (All Agents) – The Search Definition can be used on any Office or Agent globalWOLF website
- Specific Office – The Search Definition can only be used by the selected Office
- Office URL – The Search Definition can only be used on the website that matches the URL entered in the Office URL text field
- Agent – The Search Definition can only be used for websites associated with the Agent entered in the Agent text field
- Agent URL – The Search Definition can only be used on the website that matches the URL entered in the Agent URL text field

4. Enter a **Search Name** in the text field.
5. If desired, select the **Set As Default** checkbox ☑.
6. If desired, select the **Company Listings Only** checkbox.

Tip Selecting the Company Listings checkbox will limit results to brokerage-owned Listings.

7. Select if MLS Number will be an available search field from the **Show MLS Number Search** drop-down menu.
8. Select if Street Name will be an available search field from the **Show Street Name Search** drop-down menu.
9. Select how Search Results will be displayed from the **Search Results** drop-down menu.

- Not Automatic/Visitors Choice – Users can select criteria for displaying search results
- List All Results Automatically – Search results will be displayed immediately
- Map All Results Automatically – Search results will be displayed on a map

10. Select MLS Areas and click the **Add** button to include them in the search. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
11. Select Offices and click the **Add** button to include them in the search. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
12. Select Agents and click the **Add** button to include them in the search. Click the **Remove** button to remove them. Use the **Add All** and **Remove All** buttons when needed.
13. Enter a title for the search form in the **Text Override Area** text field.

14. Select search criteria using the **toggles**.

Red – This search criteria is disabled for the Search Definition
Green – This search criteria is enabled for the Search Definition

- Area – Allows search by MLS Area if Listings from multiple boards are displayed on a globalWOLF website. The Search Definition can be configured to only display Listings from specific boards. If a board does not allow its Listings to be displayed along with Listings from another board, select the **Only 1 Area for Search** checkbox ☑.
- Property Type – Allows search by property type.
- Location – Allows search by geographic location. Entry of a specific City/State/Province in the Search Options is available to further narrow the search parameters.
- Criteria – Allows search by specific Listing criteria (eg. price, year built, number of floors, acres, etc.).
- Open Houses – Allows search by Listings for which an Open House is being held. If desired, a specific date range for the Open Houses can be entered in the Search Options.

15. For each selected criterion, select additional filters using the checkboxes ☑.
16. For each selected criterion, configure the **Search Options**.

Tip Click the **Start Over** icon to reset the Search Options.

17. Click the **Save** button to save your changes or Cancel.

Editing a Search Definition

Tip globalWOLF comes equipped with multiple Search Definitions.

1. In the Navigation menu, click **Websites**. In the Websites submenu, mouse-over the **Settings** icon and click **Search Definitions**.
2. Click the desired Search Definition.
3. Edit the Search Definition as desired.
4. Click the **Save** button to save your changes or Cancel.

Deleting a Search Definition

1. In the Navigation menu, click **Websites**. In the Websites submenu, mouse-over the **Settings** icon and click **Search Definitions**.
2. Click the desired Search Definition.
3. Click the **Delete** button.
4. A prompt will appear confirming deletion. Click the **OK** button to confirm or Cancel.

Web Manager General Settings

1. In the Navigation menu, click **Websites**. In the Websites submenu, mouse-over the **Settings** icon and click **Web Manager General Settings**.
2. Select if disclaimers will be displayed on Listings from the **Display All Disclaimers on Listing Details** drop-down menu.
3. Select whether to display the board Listing status from the **Show Board Status** drop-down menu.

Tip The board Listing status is the exact Listing status provided by the board. Different board Listing statuses can number in the dozens. WOLFconnect has the capability to display simplified Listing statuses when No is selected from the Show Board Status drop-down menu.

4. Select the date that will be displayed for Listings from the **Listing Date Title** drop-down menu.
5. Click the **Save** button to save your changes or Cancel.

URL Translation

URL Translations are used to redirect users to specific web pages within a globalWOLF website or to external websites by entering keywords after a URL (eg. www.lonewolf.com/mortgage).

Redirect

Redirects can be configured to direct users to specific web pages within a globalWOLF website or to external websites. When a user is redirected the URL changes to reflect the URL the user has been redirected to.

Query strings and full external URLs are accepted in the Translate To text field.

Tip For example, a user can enter “/mortgage” at the end of the URL which will direct them to a third-party mortgage company application form.

Execute

Execute URL Translations are limited in where users can be sent and can only direct a user to another page within the globalWOLF website. Once the user is redirected the original URL remains.

Only URLs ending with .asp can be entered in the Translate To text field when creating an Execute URL Translation.

Adding a URL Translation

1. In the Navigation menu, click **Websites**. In the Websites submenu, mouse-over the **Settings** icon and click **URL Translation**.
2. Click the **Add Entry** button.
3. Select the **Office Website** from the drop-down menu.

Tip If the URL Translation doesn’t apply to an Office Website select No Office Websites from the **Office Website** drop-down menu.

4. Select the **Agent Website** from the drop-down menu.

Tip If the URL Translation doesn't apply to an Agent Website select No Agent Websites from the **Agent Website** drop-down menu.

5. Select the URL Translation Type from the **Translate Type** drop-down menu.
6. Enter the text that users will enter after the URL to activate the URL Translation in the **URL** text field.

Tip For example, for the URL www.lwolf.com/agent enter "agent" in the URL text field.

7. Enter the URL of the website to direct users to in the **Translate To** text field.

Tip Redirect URL Translations will accept a full URL or query string. Execute URL Translations will only accept URLs that end with .asp.

8. Click the **Save** button to save your changes or Cancel.

Editing a URL Translation

1. In the Navigation menu, click **Websites**. In the Websites submenu, mouse-over the **Settings** icon and click **URL Translation**.
2. Click the desired URL Translation.
3. Edit the URL Translation as desired.
4. Click the **Save** button to save your changes or Cancel.

Deleting a URL Translation

1. In the Navigation menu, click **Websites**. In the Websites submenu, mouse-over the **Settings** icon and click **URL Translation**.
2. Click the desired URL Translation.
3. Click the **Delete** button.
4. A prompt will appear confirming deletion. Click the **OK** button to confirm or Cancel.

Share Listings Opt Out

Agents can opt out of displaying their Listings on other globalWOLF Agent Websites. When an Agent opts out only MLS Board Listings will be displayed along their own Listings on their globalWOLF Agent Website.

Opting out also prohibits an Agent's Pocket Listings from being displayed on any other Agent's website.

Tip Only Administrators have access to the Share Listings Opt Out screen by default. See the Granting Access and User Roles section for more detail.

1. In the Navigation menu, click **Websites**. In the Websites submenu, mouse-over the **Settings** icon (settings) and click **Share Listings Opt Out**.
2. Enter an **Agent Name** in the text field.
3. Click on the **toggle** to opt in/out of sharing Listings.

Red – This Agent has opted out of sharing Listings
Green – This Agent has opted in to sharing Listings

Agent Website Fee

Administrators can enter the monthly cost to Agents of active basic and mobile websites.

When an Agent publishes a globalWOLF Agent Website they will be informed of the cost when being prompted for confirmation.

1. In the Navigation menu, click **Websites**. In the Websites submenu, mouse-over the **Settings** icon and click **Agent Website Fee**.
2. Enter the **Cost of Agent Website** in the text field.
3. Enter the **Cost of Mobile Website** in the text field.
4. Click the **Save** button to save your changes or Cancel.