iHomefinder IDX Administrator User Guide

This guide gives administrators the ability to manage office leads, listings and settings, and view reports using the iHomefinder Control Panel.

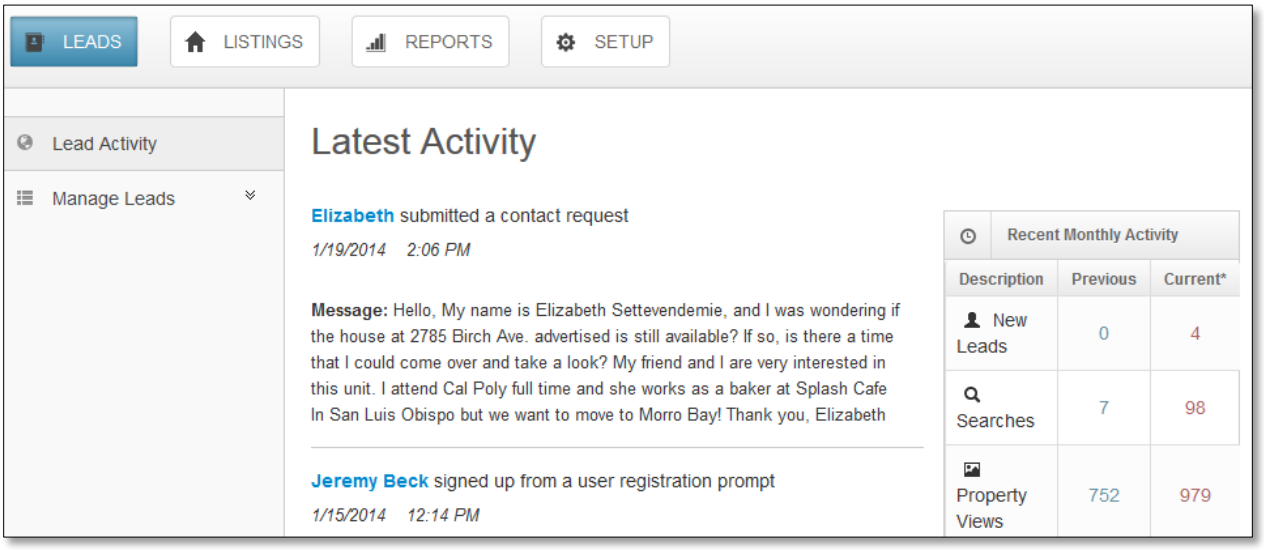
Pedersen Realty Control Panel Login

Login to the administrative and agent control panels using the following link:
http://www.idxre.com/idx/admin/index.cfm?ClientID=63824

IDX Control Panel

The IDX Control Panel will look something like the image below.

The default screen will show the most recent activity of your leads and the recent monthly activity.

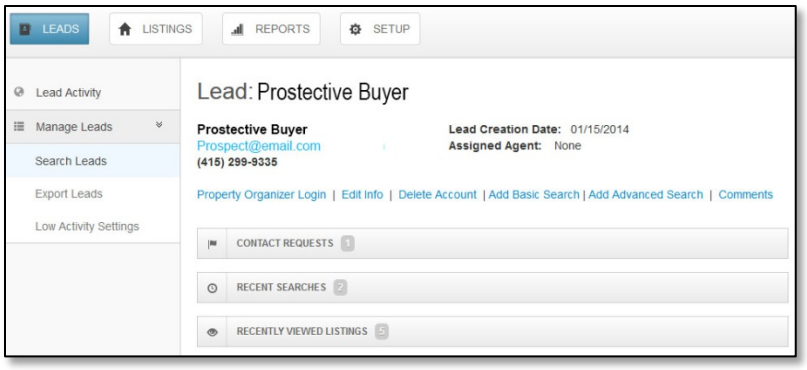


Manage Leads

Clicking the lead's name will give you the option to email the lead or to manage the lead's account.

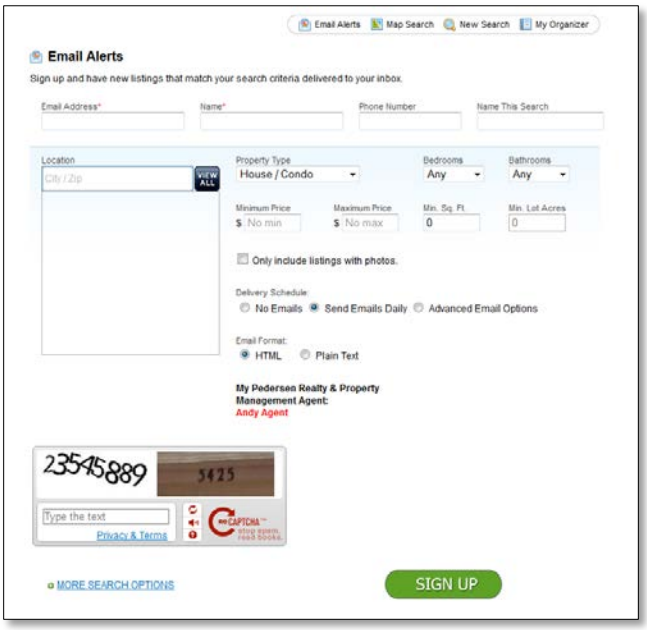
Lead Manager

Clicking Manage Lead takes you to the Lead Manager shown below. The menu across the top gives you options for viewing, editing, adding searches and comments to your lead. The tabs below the menu show your lead's recent activity.


LEADS
LISTINGS
REPORTS
SETUP
Lead Activity
Manage Leads
Search Leads
Export Leads
Low Activity Settings
Lead: Prostective Buyer
Prostective Buyer
Prospect@email.com
(415) 299-9335
Lead Creation Date: 01/15/2014
Assigned Agent: None
Property Organizer Login | Edit Info | Delete Account | Add Basic Search | Add Advanced Search | Comments
CONTACT REQUESTS 1
RECENT SEARCHES 2
RECENTLY VIEWED LISTINGS 5

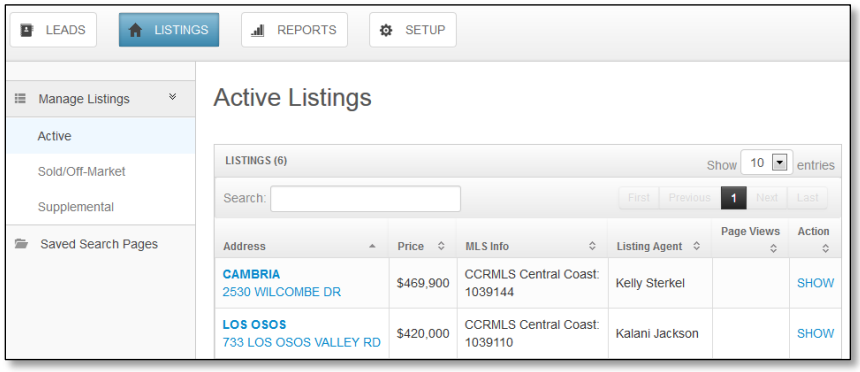
Adding a New Lead

Click Manage Leads and then Search Leads from the Leads tab, click the Add a New Lead link. This will bring up the sign up dialog box shown below. Fill in the e-mail address, name and search criteria for your new contact. If the search is for houses and/or condos you can click the More Search Options link at the bottom of the page to include more detailed search criteria. click the sign-up to add your new lead. If you selected the option, the lead will begin to receive daily e-mail alerts whenever new properties that match their search criteria are listed on the MLS.



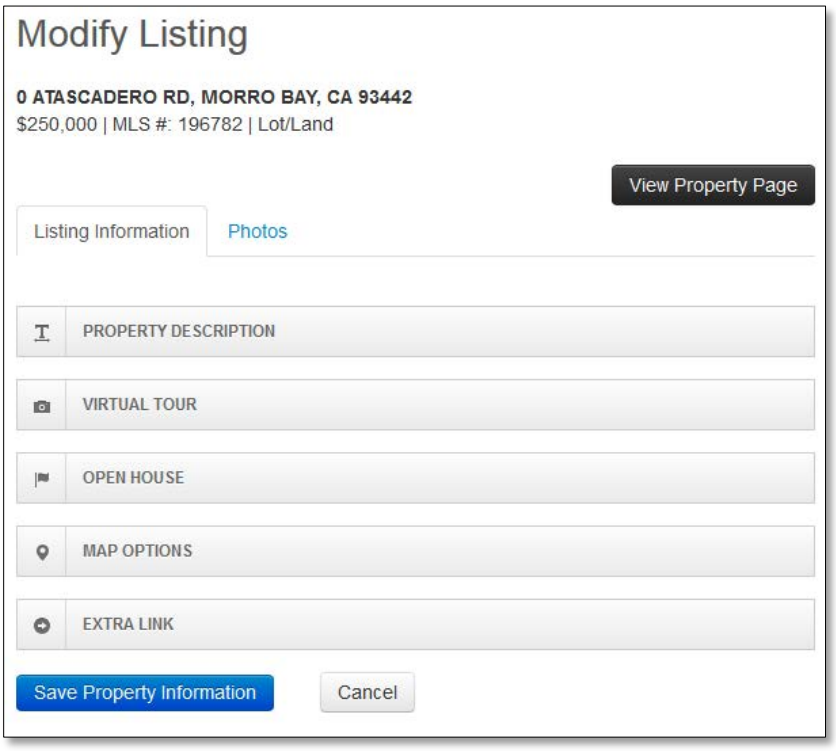
Manage Listings

The Manage Listings/Active screen displays a list of all of your listings.



Modify Listings

Clicking on a listing will take you to the Modify Listing screen.



From this screen, you can view or modify how your listing will display on your website. You can view or edit the property description; add a branded virtual tour in addition to or to replace the one on the MLS; input open house information; turn off the map location link on the property detail page; or add an extra link on the property detail page.

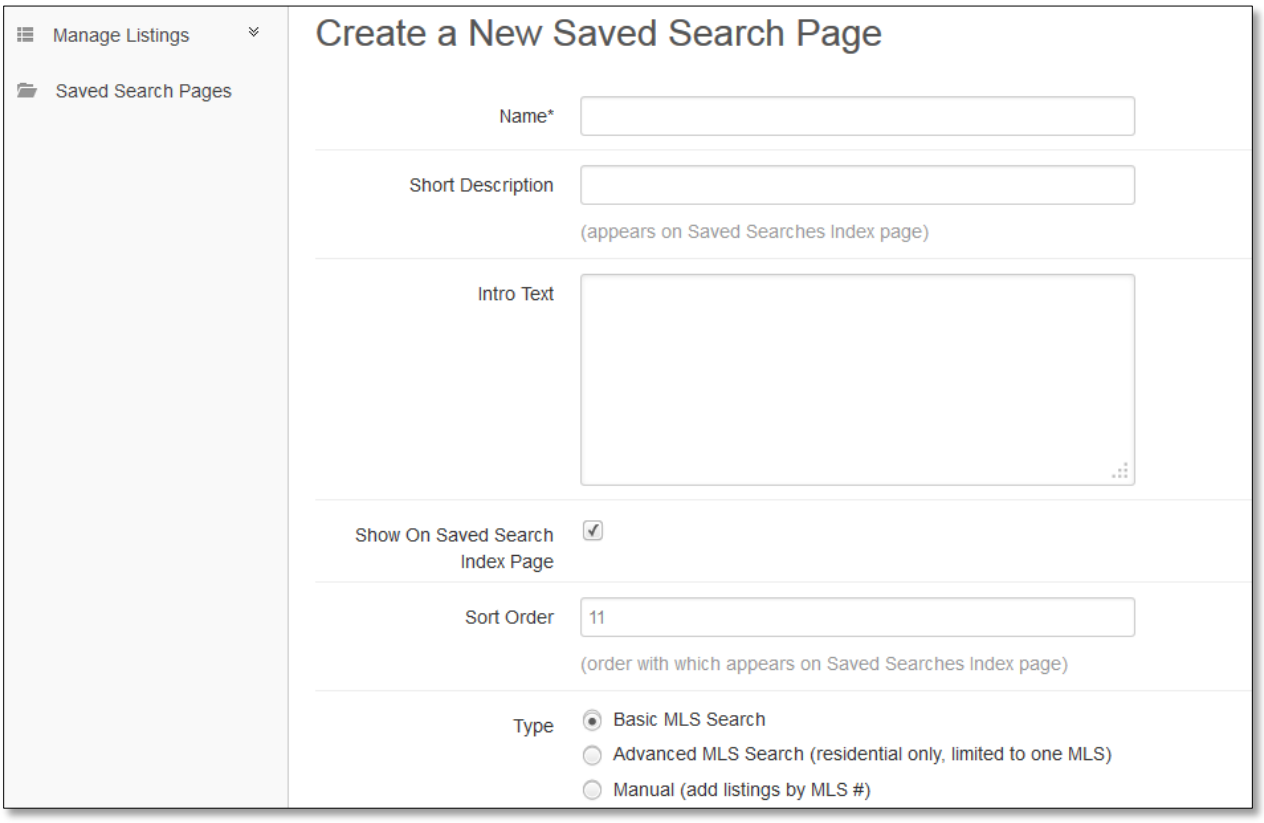
Click of the View Property Page button to see how it will display on your website.

Adding Supplemental (Exclusive) Listings

The Manage Listings/Supplemental screen allows you to add or modify supplemental listings. By default supplemental listings will display on the Our Listings page of your website.

Adding Saved Searches (Top Searches)

The Listings/Saved Search Pages screen allows you to add or delete Saved Searches.



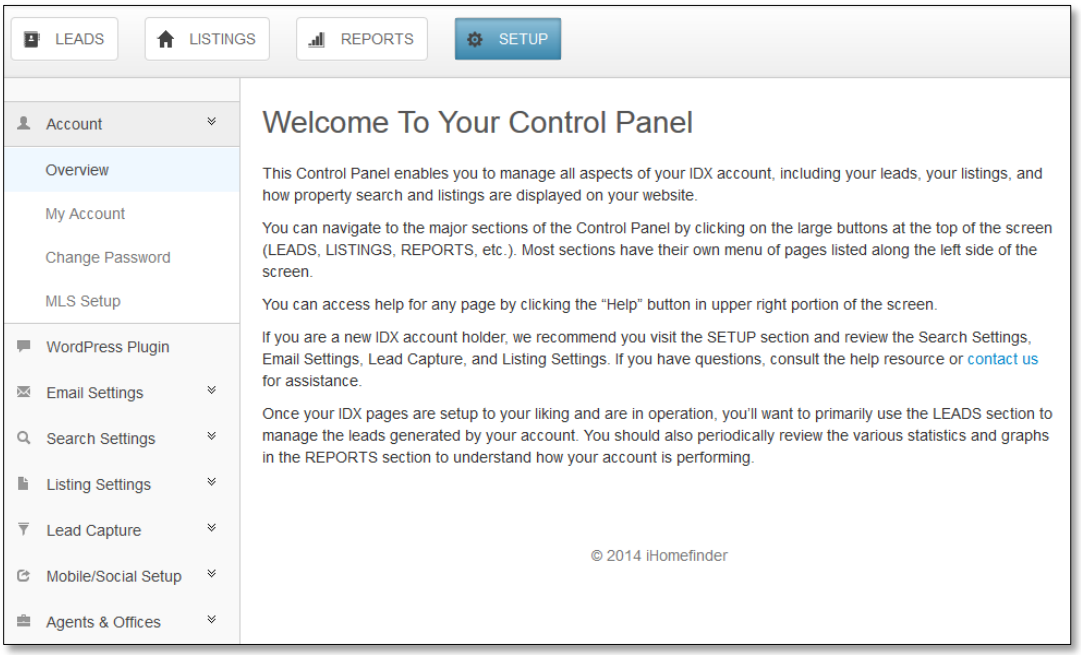
To create a new saved search page, follow these steps.

1. Name the new search.
2. Enter a short description of the search.
3. Make sure the checkbox to show on saved search index page is checked.
4. By default, the new search will be added at the bottom of the index page. If you want to put it in a different order enter it here.
5. Next, click to show your preference of a basic, advanced, or manual search. The advanced MLS search provides more options for houses and/or condos searches.
6. In the resulting search box, enter your search criteria and click the save button.

If you check the box to show on saved search index page, the new search will be displayed on the Top Searches page on your website.

The Setup Tab

The Setup Tab is where we manage the general settings. This guide will cover the settings you are most likely to want to manage.



The Account Tab

- The Account/My Account menu is where you would update your office and contact information.
- Click change password to update your username and/or password.

Email Settings

- In the Basic Setup tab, you can configure the main company contact and the e-mail update return/from address if you want it to be different than the main company contact.
- The system automatically generates e-mails to be sent to leads. If the main company contact or the agent assigned to that lead would like to receive copies of those system generated e-mails, choose Advanced Routing from Email Settings.

Lead capture

- The Lead Capture/User Registration screen allows you to manage when and how often it website user is prompted to register. I recommend using the office or ultralight option. You want the user to be engaged with your website. Too many prompts may cause them to leave.

Mobile/Social Setup

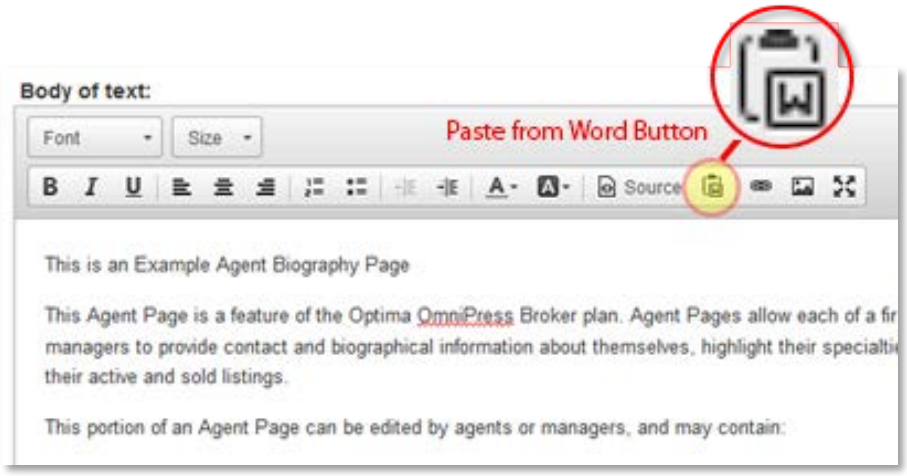
- The Facebook screen allows you to add a property search tab and a featured listing tab to your Facebook business page.

Agents & Offices

Agents

The Agents screen lists all of the agents currently on your roster. From this page you can add a new agent or modify an agents profile. Clicking an agents name takes you to the Edit Agent screen. With the exception of Agent Control Panel Settings, the options are similar to what in agents see when they login to the Agent Control Panel.

- The Agent Control Panel Settings screen is where you set an agent's username and password and indicate whether to allow agents to modify their own username and password or listings.

Agents/Bio Information and Page Header

This screen allows you to update an agent's bio and indicate whether you want to allow the agent to modify their own bio. If you are pasting text from a Microsoft Word document when updating an agent's bio, click the Paste from Word button on the toolbar (see image below) and paste the text directly into the box that pops up.