How to Build a More Effective XSite

presented by a la mode

a la mode
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Course Highlights

- Take advantage of advanced design and content features
- Enable XSite access and features for your employees and colleagues
- Understand search engines and how to work with them
- Open new markets with Online Property presentations

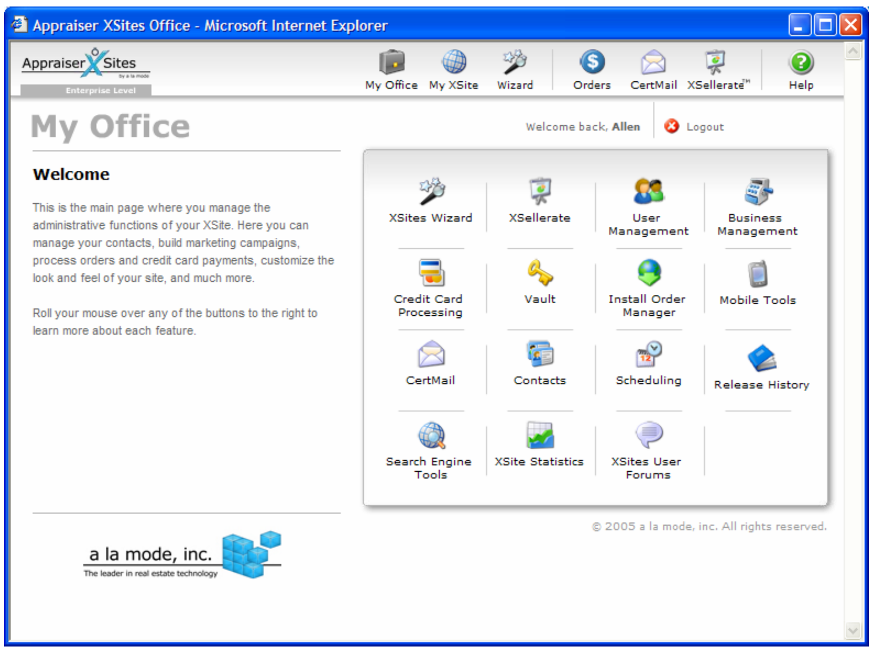
How to Build a More Effective XSite

Introduction to How to Build a More Effective XSite

So you've got an XSite. Now what? If you've set up your XSite, chances are you've spent some time with the XSites Wizard. This is the tool that helps you design and launch your XSite, plus go back and manage it on a regular basis. But that's only scratching the surface of XSites. This course will teach you how to take your XSite to the next level.

My Office

The **My Office** screen is your central launching point for all of the tools available in your XSite. It is the first thing you see when you log into your XSite Administration functions.



Setting up user and e-mail accounts

Even if you're the only appraiser in your firm, you'll need to ensure that you've got your user account configured properly. If you work with several appraisers, or have staff assistants, this is the place to set those users up as well. Setting up a User Account in your XSite also creates an e-mail account in CertMail. To create a new user for your XSite:

1. From the **My Office** window, click the **User Management** icon.
2. The **User Management** window appears listing all of the user accounts you've established. If this is the first time you've accessed this function, you'll only see your primary admin account (the one you received when you bought your XSite).
3. Click **Add User** to create a new user. Or, click the link for any existing account you'd like to modify.

XSite Login & E-mail

1. Choose whether you want to use an external e-mail address or your XSite's CertMail .
2. Enter **Your E-mail Address** or create a new one if you chose to use your XSite's CertMail. Then enter your preferred **Password** in the corresponding field in the **XSite Login & E-mail** pane. These items are used to log in to all XSites functions.
3. If you have an e-mail address for your mobile device, enter it in the **Mobile E-mail** field. You can also enter a numeric Mobile PIN to ease logging from a mobile device with limited input options.
4. If you chose your XSite's CertMail, you can type an **E-mail Friendly Name** to display when you send e-mail from CertMail.
5. Using your XSite's CertMail, you can also setup **E-mail Forwarding** to forward copies of your e-mail to another address.

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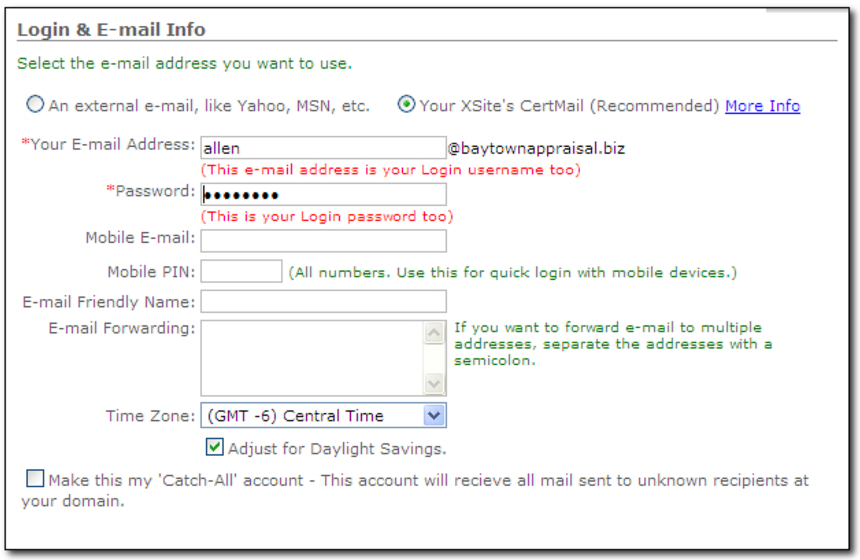
6. Next, choose the appropriate **Time Zone** from the drop-down menu and indicate whether you want your XSite to adjust for **Daylight Savings Time** by checking the box.
7. Finally, using CertMail, you can create a "catch-all" account that will receive all e-mail sent to your domain regardless of whether your e-mail address is misspelled. To do so, simply check the **Make this my Catch-all account** box. Then continue on to the **User Information** section of the profile.

***Note**: This feature will not catch e-mail for other CertMail accounts you've created, and due to its nature can sometimes attract more SPAM e-mail.*



8. When you're finished, move to the **User Information** section of your User Profile.

User Information

In this section, complete as many fields as desired. Only the **First Name** and **Last Name** fields are required. The additional data is used to create an entry on the **Staff Profiles** page in your XSite.

1. Choose an appropriate **Type** for this user from the drop-down menu.
2. Click the **Change** link next to the **Portrait** field to upload a picture of this user. Click **Browse**, then select an image file from your hard drive. Click **Open**, then **Upload** to see your image. Click **OK** when you're done.
3. Use the **Change** link beside the **Bio Text** field to include a formatted document, like a resume. The **Page Content Editor** screen opens. From here you can type data, using the rich word processing commands found in the buttons, or copy and paste your text from any word processor. Click **OK** when done.
4. To complete your user, click **Save**.

***Note**: You must click **Save** to keep your changes. If you open a different User Account or leave the profile without clicking **Save**, your changes will be lost.*

Credentials and E & O Information

If you're editing your admin account, you can also add your license and E&O information to your profile.

1. Simply click the **Edit** link next to **License Information** and then enter your license information into the window that appears.
2. Be sure to click the **Add** link to the left of your information to save your info, then click **Done** to return to your profile.
3. Next, to enter your E & O Information, simply click the **Edit** link next to **E & O Information** and enter your policy information.
4. When you're finished, simply click **Save** to save your changes.

Online Ordering Profile

Once again, a feature exclusive to your admin profile, the **Online Ordering Profile** section of your user profile allows you to control the same options previously located in your XSites Network profile.

To change your **Out of Office** status:

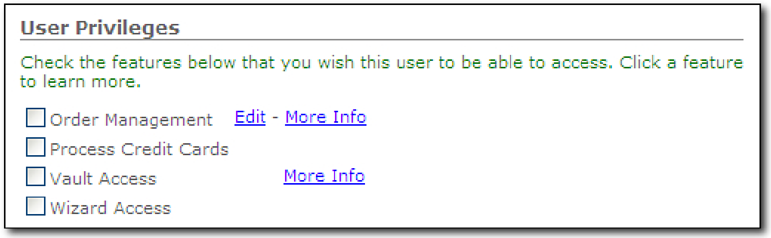
1. Click the **Edit** link next to the **Out of Office** section of your profile.
2. Then, enter the dates you will be leaving and returning in addition to any notes or comments you would like to issue to your clients.
3. When you're finished click **Save** to post the **Out of Office** notification automatically upon the date you leave.

To change the types of status notifications you'd like to receive:

1. Click the **Edit** link to the right of the **Notifications** section.
2. Check the boxes that correspond with the types of notifications you would like to receive including order notifications, daily status reminders, and contact information request notifications.
3. When you're finished, simply click **Save** to save your changes and return to your user profile.

User Privileges

Click the check box next to each of the privileges you'd like this user to have on your XSite.



Order Management – View and work with online orders received through your XSite. You must enter an XSites Network username and password for the user as well. This is separate from your XSite username and password above.

Process Credit Cards – If this user is going to manage your credit card payments, click this box.

Vault Access – Access to your online file storage is controlled with this option. You'll be prompted for your company's Vault username and password as well.

Wizard Access – Users granted this privilege will be able to use the **XSites Wizard** in the **My Office** window to change the look and feel of your XSite.

User Management – If you'd like to allow other site users to administer your User Management to offload some of the work, check this option.

Accounting – Users granted this privilege will be able to access the **Accounting** tools in the **Business Management** section of your XSite. Only grant this privilege to those users you trust with the financial side of your business.

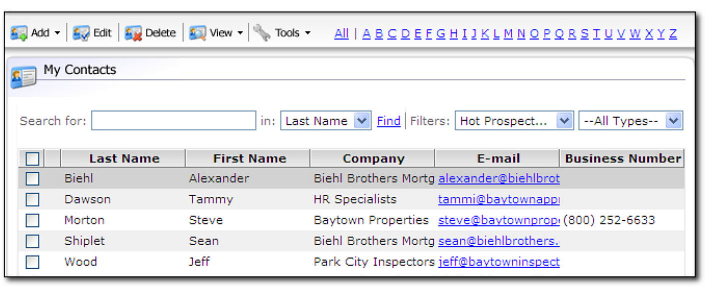
Creating a Staff Profiles page

Once you've set up profiles for the members of your staff, you can add a **Staff Profiles** page to your site. To do so:

1. From the **My Office** screen, click **XSites Wizard**.
2. From the **Content** menu on the left, click **My Content**.
3. In the **Provided Content Pages** window, scroll down and click the check box next to **Staff Profiles**, then click the title.
4. In the menu at the top of the **Editing – Staff Profiles** screen, click the check box next to the staff members that you want to include on your page.
5. Use the up and down arrow buttons to move the staff members higher or lower in the list.
6. In the text editing window below, create the text that you'd like to appear alongside your staff photos. Once again, you can use the word processor tools found above the text field, or copy and paste from your favorite word processor.
7. When your page is complete, scroll down and click **Save**.

Contacts

Included in your XSite is a comprehensive contact management database. The advantage to using this tool is that any customer or visitor who uses your site is automatically added to your contacts list. Now you can also add company contacts to your database.



To add a company:

1. From the **My Office** page, click the **Contacts** icon.
2. In the **My Contacts** screen, click **Add**, then choose **Add Company**.
3. Choose a company type by checking the appropriate box and then indicate whether you want to make this company contact available to all your XSite users or just for yourself by marking the **Public company** check box accordingly.
4. Complete the information in the desired fields.
5. Then click **Save** to save your changes.

To create a new contact in your database:

1. From the **My Office** page, click the **Contacts** icon.
2. In the **My Contacts** screen, click **Add**, then choose **Add Contact**.
3. Complete the information in the desired fields.
4. **Hint**: If you added your own company per the previous steps you can choose to assign this contact to that company by choosing the company from the drop-down menu.
5. Click **Save**.

Modifying Web Pages

One of the benefits of an Appraiser XSite is that you can have a website up and running in no time using our provided pages. Just mark the ones you want and move on to the next step. Realize, though if you use only our provided copy, your site won't seem very personal. You'll want to jazz up the most common pages on your site, especially your home page.

- ❑ Make sure your company name is used instead of pronouns whenever possible. It sounds more natural.
- ❑ Be sure to specifically state why you are different than other appraisers. Differentiate yourself and your services.

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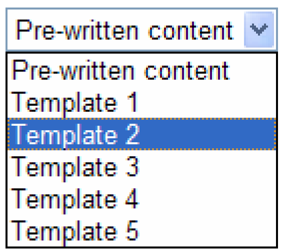
- Keep paragraphs and sentences short and to the point. Use bullet points whenever possible.
- Read your website aloud (or have someone read it to you) and see if it sounds like something you would say. If it doesn't, rewrite it.
- Talk about the needs of your client and how you solve their problems. Don't just talk about yourself all the time.

Web Page Editor Environment

Once you've decided to include a page on your site, click its description and you can preview or edit the page.

- If you've enabled the multilingual features of your XSites, the drop-down menu allows you to select which language you're going to edit.
- You can choose a "template" for the page by selecting one from the Pre-written content drop down menu. Several of our provided pages have a choice of pre-defined layouts and text to choose from.



- At any time, you can Revert to the previously saved version of your content by clicking the **Revert** button.
- To start from a clean slate, click the **Blank Page** button.
- The bulk of the screen is taken up by the content editor itself. As mentioned before, this is like a word processor. You can begin typing information in the window, edit existing text, or copy and paste items from other sources.
- Above the text editor, you'll see rows of buttons, each with its own function. These are very similar to the buttons found in most popular word processors. To learn what a certain button does, just hover your mouse over it.

- Below the text editor is a checkbox for HTML mode. When you check this box, you'll see the raw programming code for your page. Use this feature only if you are familiar with HTML and web page programming.

Below the word processor area is a series of Other Content Options:

- **Include Dynamic Content -** Click this option to add content such as a news feeds, mortgage calculators, current interest rates, and more as a sidebar to any page. To select specific content, click the **Customize** button. Select the items you want to appear and click submit.
- **Client Data Capture Form** – This option lets you choose place a customer feedback form on your page. Clicking the **Customize** button allows you to select one of our pre-defined forms, or create one of your own. See the section **Creating Lead Generation Forms** below for more.

To the right of these options are a series of drop-down boxes that let's you organize where on the page each of the items you've chosen will appear.

Client data capture forms

As you generate traffic to your site, the challenge then becomes to convert those visitors into customers. The only way to do this is to get those visitors to tell you something about themselves, so that you can follow up. This is done through client data capture forms, which can be created and added to any page on your XSite.

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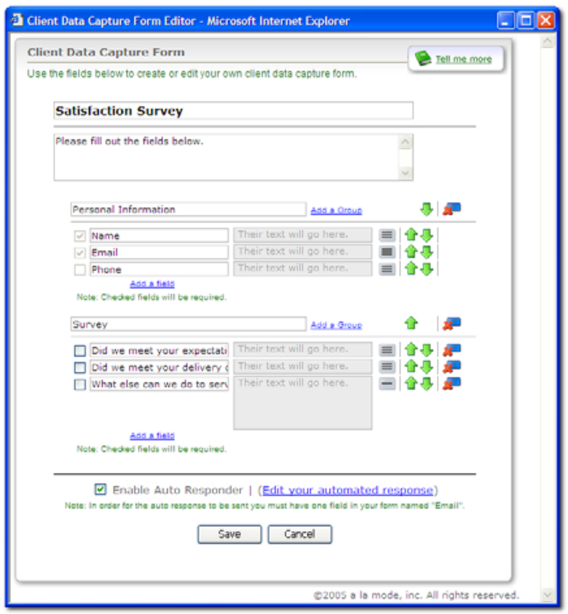
Client data capture forms

To create a client data capture form:

1. From the **My Office** page, click the **XSites Wizard** icon.
2. In the **Content** menu pane on the left, click **My Content**.
3. From any of the Content tabs, click the name of the document to which you wish to add a lead generation form. Then, scroll down the **Page Content Editor** window to view the **Other Content Options**.
4. Click the check box for **Client Data Capture Form**, then click **Customize and Create a form**.



5. In the top text box, type the name you'd like to give this form. This text appears above your form on the page, so make sure your name describes what the form is for.
6. Below the title, enter some text explaining to your site visitor why they should complete this form. This is your chance to "sell" this form and entice visitors to share some information with you.
7. Type a title for the first group of data entry fields; "Personal data" for example.
8. Each form includes three basic fields: **Name**, **E-mail** and **Phone**. You can't change these fields, but you can move them up or down in the list by clicking the up and down arrow buttons.
9. Click the **Add a field** link to create a new field.
10. Edit the text in the field's name to reflect the data you'd like to collect. Check the box to the left if you'd like this to be a "required" field. Also, if you'd like the user to have more space to enter information, click the button to switch between a single-line and a multi-line data field. Once again, use the up and down arrow buttons to position your new fields.
11. Click the **Add a Group** link to add a new group to your form. Type the title of this form in the text box and then begin adding fields to this group.
12. Continue adding groups and fields until your form is complete.
13. Next, click the **Enable Auto Responder** check box below your form. This creates a response that is sent to any user automatically whenever they complete your form.
14. Click the **Edit your automated response** link to open the editor. Type the text you'd like sent to your visitors in the large text box. In addition, click the check box to include any of your standard contact information in the message. Click **Save**.
15. Click **Save** again to complete your client data capture form.
16. Click the box to the left of your new form, then click **Submit**.
17. Finally, from the drop-down menu in the **Other Content Options** area, select the **Contact Group** you'd like any responders to your form to be included in.

Search Engine Optimization

XSites are a great tool to help you manage online orders from your existing customers. But they can also play a role in generating new customers for you. Today, businesses and individuals are often turning to the Internet as their first stop in finding services they need. And to find these services on the Internet, they're using search engines, such as Google, MSN Search and Yahoo.

For people to find your site when they're searching for appraisal services, you need to ensure that your site is configured properly. Here are some guidelines for working with search engines.

What are Search Engines?

Search sites can be divided up into three categories:

True Search Engines (Google) – Use computers called robots or spiders to do the job a human does for directories.

- Spiders crawl the web and "read" individual pages
- Spiders read the actual text (not inside an image)
- Spiders look at the <HTML> and <META> tags

Directories (Yahoo! Directory) – Use human editors to add a site IF they think it will add to the content of the category they are in charge of.

- Look at your site as a whole
- Look at what you submit to see if it matches the site
- Does the site add to the category?
- Does the title match the site?
- Is the description accurate?
- Can all statements and descriptions be substantiated?
- Title and description determine relevancy

META Search Engine (Dog Pile) – searches directories and search engines to return the top results.

How do you get Listed in a Search Engine?

Search engines, such as Google, do crawl from time to time index web sites, however they base rankings for search phrases such as "Oklahoma Real Estate Appraiser" based on how relevant and popular your site is.

- **Most important. Get other sites to link to your website.** Failing to do this almost certainly means you won't be found in a search engine. If a lot of people are linking to your site, then the search engine must think "Hmmm… This must be a great website!"
- Get quality links. It's one thing to have friends, other businesses, the chamber of commerce and web directories pointing to your site. It's even better to have newspapers and other "popular" sites linking to you. A great way to get them to link to you is to write an article they can post on their site and then link to you, the author.
- Make sure your site changes and is interesting. If your site is the same as everyone else's and never changes, it probably won't be popular with search engines or humans for that matter.

Modifying your Home Page for SEO

One of the most significant ways you can improve your Search Engine Marketing efforts is by modifying your home page. After all, since your home page is the "landing" page for your site, nearly everyone who finds your site will access it through your home page. In addition to the other Search Engine Optimization efforts discussed later in this outline, you should take some time to employ these changes on your site as well:

- Make sure your company name, service area, specialties, and anything else specific to you is on your home page.
- Customize your page title, keywords, and page descriptions.
- Customize pages on your site so they are unique and different
- Include phrases in the "consumer's language" so that they'll match up with their searches.

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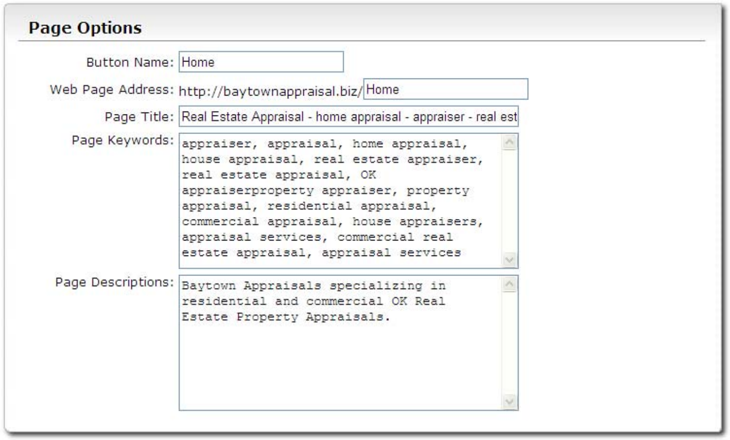
Creating META tags in XSites

META tags are read by search engines to get a summary of your website. Even though, the pages content should dictate this, META tags can rephrase things or even include misspellings and synonyms to match what a consumer may enter in Google's search box.

Click the page from the Site Content area of the XSites Wizard to open it in the **Page Content Editor.** Then scroll down to **Page Options** and make your changes.



Turning on Site Maps and Footers

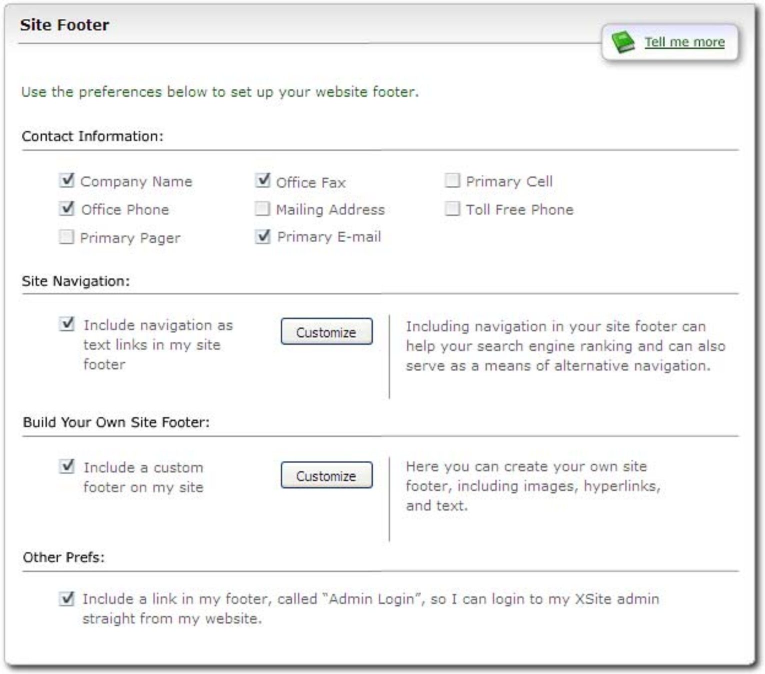
Two of the most effective tools for helping search engines navigate your site are Site Maps and Footer links and XSites make them easy:

To create a **Site Map** page:

1. From the **My Office** window, click the **XSites Wizard** icon.
2. Click the **My Content** button in the **Content** menu pane on the left.
3. In the **Provided Pages** tab, scroll down and click the check box next to **Site Map**.
4. If desired, click the name to open the **Page Content Editor**. Make any desired changes to the page and click **Save**.

To turn on a **Site Footer**:

1. From the **My Office** window, click the **XSites Wizard** icon.
2. Click the **Site Footer** link in the **Content** menu pane on the left.
3. Click the check box for **Site Navigation**, then click **Customize**.
4. Click the check box for those site pages you wish to include in the footer, then click **Save**.
5. Next, click the check box to turn on the custom Site Footer.
6. Click the **Customize** button and enter the text for your site footer. This should include any keywords you want to highlight on every page in your site. Click **Save** to complete the footer.



Building Links

One of the most useful tools in getting search engines to give your site a high ranking is the number of links to and from your site to other relevant sites. The biggest boost comes when other high-ranking sites link to you. So, don't wait for these sites to find you! Look for the larger real estate offices and mortgage brokers in your area and find out it they have a links page which you can sign up for.

***Note**: Beware of creating links to "link farms" that exist only to boost search engine ratings. Most common Search Engines are aware of this method of "trickery" and will dock your site placement for linking with such sites.*

Or, talk with appraisers in other geographic areas and have them add a link to your site. Search engines don't care that the two sites are not in the same market.

Of course, if you're asking for links to your site, you may be asked to create a reciprocal link back to the other business. To create your own Links Page:

1. From the **My Office** window, click the **XSites Wizard** icon.
2. Click the **My Content** button in the **Content** menu pane on the left.
3. Scroll down to the bottom and click the **Add a New Page** button.
4. In the **Page Content Editor**, begin typing the text you'd like to include to describe your links page. Make sure you use some text that describes why these links are relevant to your business.
5. Now, type the name of the first site for your link. After the name, continue to add some additional information about the site. Again, make sure you're specific. Link pages work best when it is clear how each link relates to the site. Long lists of unrelated links will not help you in search engine ranking, nor will it impress your site visitors.
6. To insert the link to another web site, select the text you would like highlighted as the link; most often the name of the site itself is sufficient.
7. Click the **Create Hyperlink** button in the menu bar and then select the **Link to a URL** tab.
8. In the text box, type the **URL** of the site. Notice that the *http://* portion is already included in the drop-down menu, so don't repeat this in your text.
9. Click the **Open in a new window** radio button. This ensures that your site visitor is able to view the new site, but that your pages remain open as well. Click **Save**.
10. Repeat the steps above to add additional links. When you're done, scroll down the **Page Content Editor** screen to the **Page Options** pane.
11. In the **Button Name** field, type the name you'd like to appear in your menus; "My Links" for example.
12. In the **Web Page Address** field, type the name again, without spaces (mylinks).
13. In the **Page Title** field, change the "Custom Page" text to the name of your button. You may want to leave the remainder of the text intact.
14. If desired, edit the page keywords and descriptions, then click **Save**.
15. Click **Organize Content** in the **Content** menu and place your new page where you'd like it in your menus. Most links pages appear near the bottom of menu lists, but you can place it wherever you like.

Search Engine Tools

Included in your XSite is your own Search Engine submission tool. Of course, a la mode handles the initial submission of all XSites to the major search engines. However, you can take control of your own destiny by submitting some or all of your pages whenever you feel it appropriate.

To use these tools:

1. From the **My Office** window, click the **Search Engine Tools** icon.
2. The content pages you've included on your site are listed in the dialog box. Next to each page is the date you last submitted it to the search engines.
3. Click the check box next to the page you'd like to submit and click **Submit these pages now**.

The **Search Engine Tools** page has a wealth of information regarding search engines and the best way to maximize your exposure. Some highlights include:

- Custom content is the key – Make sure you're submitting those pages that have content that you have created and that nobody else is likely to have.
- Submit when things change – The best time to submit a page is after it has changed substantially. Resubmitting the same page over and over does not help.
- Don't submit a page more than three times per week – Submitting pages too often may lead to your site getting "black-listed."
- Focus your efforts – Rather than submitting all of your pages, be selective and only submit those that really highlight you and your services, like your home page, staff profiles and "Why Choose Me" pages.

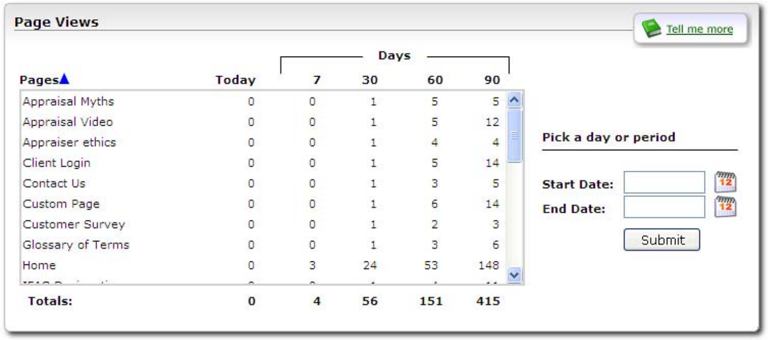
XSite Statistics

To manage a truly effective web site, it is helpful to know which of your pages are getting visited and how often. This allows you to fine tune your content to reflect the interests of your clients. To view your site's performance statistics, from the **My Office** window, click the **XSite Statistics** icon. Statistics pages are broken down into the following:

Online Ordering Stats – This section tells you, at a glance, how many orders you have received through your XSite since it came online. Likewise, it shows what your average fee and turn time is for that period. Finally, you can quickly see how many open orders you have at this time.

Page Views – Page views (also called "impressions") track the number of times each page of your site has been visited, since it was launched. To view the number of page views for a specific day or time period:

1. Enter the desired start and end dates. Or, choose the dates from the calendar by clicking the button.
2. Click **Submit** to view the Page Views for this time period in a separate window.
3. Click the close window box in the upper right corner of the window to close the view.



Entry Pages –This view shows you which pages your visitors are hitting first when they visit your site. This can be particularly interesting if you're running advertisements that direct visitors to particular pages. You can gauge the effectiveness of your advertising by the number of hits these Entry Pages are getting. Use steps 1-3 above to view the Entry Page hits for a specific day or time period.

First Time and Returning Visitors – XSites can differentiate between a new visitor and one who has been to your site before. This can be very helpful in evaluating how effective your XSite is in drawing visitors back on a regular basis. Use steps 1-3 above to view your First Time and Returning visitor information for a specific day or time period.

Referring URL – If you're relying on search engine placement or links from other sites to drive new visitors to your site, it is useful to know which of those tools is most effective. The sites listed in this pane are the ones that visitors to your site were viewing before they came to yours. Due to limited screen size and the fact that some URLs can get very lengthy, only the first part of the Referring URL is displayed. Hover your mouse pointer over the beginning of the URL and the complete address will appear in a pop-up box. Use steps 1-3 above to view the Referring URLs for a specific day or time period.

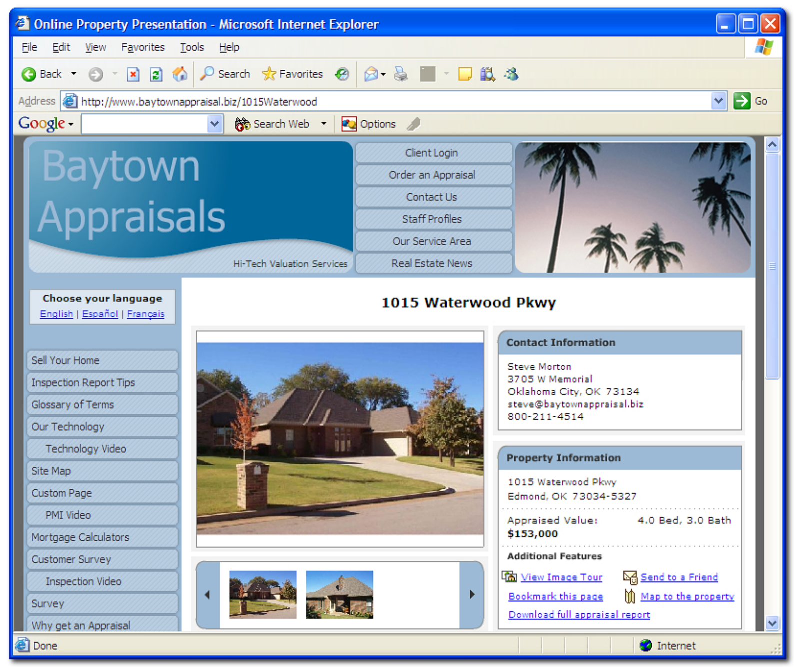
Common Search Phrases – When visitors locate your site through a search engine, the specific words they used to find your site are passed along to your XSite. Viewing those keywords in this pane allows you to refine your marketing and indicates which phrases you should be using in your page text as well as the META tags. Use steps 1-3 above to view the **Common Search Phrases** for a specific day or time period.

Online Properties

As the appraisal industry evolves, the savvy appraiser is always on the lookout for new ways to market appraisal services to different audiences. One often overlooked segment of the real estate market is the "For Sale By Owner" or FSBO home seller. These individuals are often marketing their homes without the benefit of a real estate agent to help them establish the value of their homes. Enter the appraiser.

XSites include a feature which allows you to help FSBOs market their homes and justify their asking prices. Specifically, once you've completed an appraisal for a FSBO customer, you can upload that appraisal to your XSite. A custom URL is created on your XSite, which home sellers can pass along to perspective buyers. When a buyer views the site, they see the following:

- Summary of the professional appraisal report
- Link to download the full appraisal report
- Beautiful Flash-animated listings brochure
- Unlimited, full-color photos (provided by you during your inspection)
- Virtual tour
- Online map



Creating an Online Property Listing

To create an Online Property Listing:

1. From WinTOTAL, with the desired appraisal report open, choose **Tools**, **Property Presentation Wizard**.
2. In the login dialog box, enter your XSite **Username** and **Password,** then click **Next**.
3. The **Additional Information** dialog box appears, allowing you to enter specific information about the property which may not be included in the appraisal report, but would be beneficial in marketing this property to buyers. Fill out any or all of the fields for which you have information and click **Next**.
4. Next, type a **Property Description** and click **Next**.
5. On the next screen, you can specify how much, if any, of the report you'd like included on the site. To include a PDF of the entire report, click the **Print the entire report to PDF** radio button. To select certain pages, instead choose **Print specific pages**. Click **Next** to continue.
6. Now, you're given the option of uploading any photos from the report to your XSite. Simply click the check box for the photos you wish to include. If you have additional photos from your inspection that aren't included in the report, click the **Add additional photo** link. Find the photo file on your hard drive and click **Open**. Repeat this step to add additional photos. Click **Next** to continue.
7. Now, select the XSite you wish to upload this report to from the **Your XSite** drop down menu. In the **Path to presentation** text box, type the URL which you'd like the homeowner to use. For example, you might type the property address.
8. Complete the **Client's Name** and **E-mail Address** fields to automatically generate a Disclosure Agreement form. You may also want to enter the client's physical address into the fields provided. The client completes this form to grant you permission to display the report. Click **Next** to continue.
9. The wizard now generates the report. If you opted to include only a portion of the report, the standard WinTOTAL print dialog box appears allowing you to select which pages are printed. Make your selections and click **OK**.
10. Once the report is generated, you're prompted to preview the site. Click the link to open a window and ensure that the information is correct. Click **Next** to continue, then click **Finish** to complete the process.

Now that the report is complete, you have to return to your XSite to enable it. Before doing so, you should contact your customer and ensure that they received the electronic End User Agreement and are willing to accept the terms. They're prompted to visit the site online and complete an acceptance form. Once this is done, you're ready to launch the property report on your XSite.

1. From the **My Office** window, click the **XSites Wizard** icon.
2. Click **Online Properties** in the **Content** menu pane on the left.
3. The reports you've uploaded from WinTOTAL are displayed in the **Online Properties** window. Click the **Preview** link to look at the site. If your site's File Not Found message is displayed, this means that the home owner has not yet completed their acceptance form. Once they do so, the site should display properly.
4. Click the check box to the left of the property name to turn this page on and off. Click the **Delete** link to remove it from your site. If you need to adjust the URL address you entered earlier, click the **Edit URL** link.

Your customer's property is now available online to assist in marketing their home. Note that it is not viewable from your XSite, unless you choose to add the link to either a menu item or to a custom page.

NOTES: