

# Step by Step: Getting your XSite off the Ground

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presented by a la mode



## Course Highlights

- ❑ Go from zero to Website in just 10 steps
- ❑ Simple Wizard interface makes it a snap to keep your XSite fresh
- ❑ Graphic design and Flash technology make it powerful and simple
- ❑ Hundreds of themes and color combinations so your site is unique

# Step by Step: Getting your XSite off the Ground

## Introduction to Step by Step: Getting your XSite off the Ground

More clients will visit your website than will ever see your desk, so it's important to have a top-notch site. Appraiser XSites make it easy – and they come in three levels to suit the needs of any size appraisal practice.

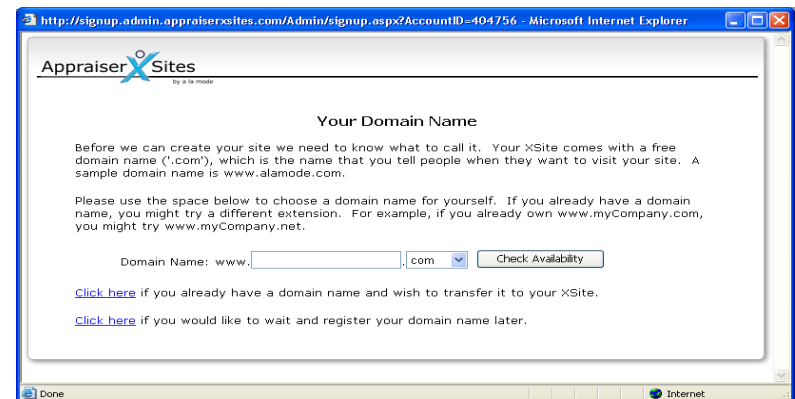
MANAGEMENT AND ADMINISTRATIVE TOOLS	Std	Pro	Enterprise
Process credit cards and see detailed transaction history			•
View web traffic statistics such as orders placed		•	•
Use a global "a la mode" login to access multiple online services	•	•	•
Export orders straight to WinTOTAL	•	•	•
<b>XSITES MOBILE (Use your cell phone, PDF or Palm device)</b>			
Manage contacts and send e-mail while on the go			•
Download a location map or driving directions			•
Read orders into Pocket TOTAL; download flood & census tract data			•
Get instant notifications when orders or questions come into your site			•
Process credit card transactions onsite			•
<b>CLIENT COMMUNICATIONS</b>			
Give clients a secure login areas to place orders and download reports	•	•	•
Send status e-mail and fax notifications with XSite Order Manager	•	•	•
Use DirectFax to turn paper into PDFs (pages allowed per year/day)		200 / 20	1000 / 100
<b>XSELLERATE &amp; OTHER MARKETING TOOLS</b>			
Use pre-built e-mail campaigns (or customize your own)			•
Create printed letters, brochures, flyers and postcards			•
Use the Online Property Presenter to give FSO's a place to advertise			•
Use XSites pre-built question forms to gather client information		•	•
<b>INTEGRATED E-MAIL AND CONTACT MANAGEMENT</b>			
Manage your contacts and schedule simultaneously		•	•
Multiple 100MB virus and SPAM protected accounts		10	15
Integrate with Outlook or other e-mail client		•	•
Use SureReceipts to deliver files with time-stamped confirmations		•	•
<b>CONTENT &amp; CUSTOMIZATION</b>			
Implement Flash videos to teach visitors about your business			•
Integrate 17 mortgage calculators			•
Pre-written, appraisal-specific content (# of available pages)	5	75	75
Customizable, animated themes (# of available themes)	9	74	143
Add more design pizzazz with a Flash intro		•	•
Animate your website header or create a custom Flash intro			•
Customize any web page with our easy HTML editor	•	•	•
Make unlimited content additions		•	•

## XSite basics and logging in the first time

After purchasing an a la mode Appraiser XSite, you're sent an e-mail containing a link to log in to your XSite for the first time. The first time you log in, you'll see our license agreement. (It's pretty standard.) You'll need to read through and accept it before continuing.

One of the features of an XSite is that we register and maintain a ".COM" for you. This keeps you from having to use a 3<sup>rd</sup> party – but the domain still belongs to your company. So, the first thing we do, is get the process started for you to have a domain.

- ❑ If you don't already have something in mind, you can skip this and come back to it later. Your domain is also your e-mail address, so it's no problem if you want to take a little time to make something unique. You can still "build" your site and get it online without having the domain immediately.
- ❑ If you already have a domain name, we have a process for you to host it on our servers through your XSite
- ❑ If you want multiple domains, we have a process for that, too.



Once you've chosen a domain (or not) we take you to your XSite "My Office" area- an online interface for building and managing your web presence.

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## My Office

Your XSite is more than just a web page or billboard. With more and more appraisal offices becoming “virtual” offices, you need something to keep remote employees tied together. That’s what your XSite does – manage orders, e-mail, communicate in forums and more.

Your XSite is managed completely through your web browser in the XSite **My Office** interface. You don’t need to install any additional software. To access **My Office**, just go to your XSite domain, followed by **/admin**. Then, enter the login information supplied after getting your XSite.

In **My Office**, we’ve arranged shortcuts to all the crucial parts of your XSite. As you hover your mouse over shortcuts, you’ll see a description of them appear on the left.



**XSites Wizard** – Configure and design the look and feel of your website, as well as enabling features like online ordering.



**XSellerate** – If you’ve purchased our electronic business marketing system, a link to it appears in **My Office**.



**User Management** – Create accounts for the users of your XSite, whether they’re employees, associates or assistants.



**Orders** – This link takes you to your order management tools, including online status notifications.



**Business Management** – In conjunction with online ordering, your XSite becomes a tool to manage your billing, cash flow and invoices.



**Credit Card Processing** – Online credit card processing may be the key to helping you keep your receivables in check. This link allows you to create and manage your merchant account.



**Vault** – An integral part of your file management and archiving procedures, you can access the files in your Vault account from **My Office**.



**Install Order Manager** – This link helps you install XSite’s Order Manager, our offline order-management tool.



**CertMail** – Access your e-mail with just a web browser from anywhere through this online application.



**Contacts** – Add your business associates to this online address book to facilitate communication. It’s particularly useful in conjunction with XSellerate!



**Scheduling** – Manage your appointments, inspections and other important dates with this online day planner.



**Mobile Tools** – You’re never out of touch from your XSite if you carry a mobile computing device. Use this link to learn about all of the handy mobile tools available to you.



**Search Engine Tools** – Submit your site to popular search engines and gain advice on how search engines work.



**XSite Statistics** – Find out how many visitors you’ve received, which of your pages are getting read the most and how many orders are being generated.



**XSite User Forums** – Connect with other appraisers as well as our XSite development team




**Release History** – We’re constantly adding new features to Appraiser XSite’s. Catch up on all the latest features, content and other advancements from this link.

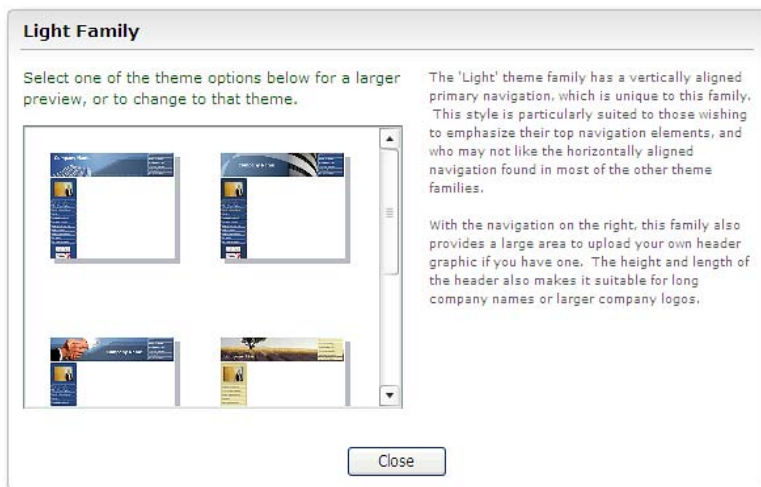
# Step by Step: Getting your XSite off the Ground

## Using the XSite Wizard

The XSites Wizard steps you through the process of configuring and launching your website. While you can use the menus to jump straight to the specific tools you want to modify, the simple ten-step Wizard is there to guide you through the process the first time. To begin, click the **XSite Wizard** icon in the **My Office** screen.

## Step 1: Select a Theme

1. Click on the desired theme in the **Theme Families** list. If you own an Enterprise Level XSite, you may choose from the list of themes on the right as well. Animated themes are marked with a .
2. From the **Theme Families** dialog, click the specific theme desired.

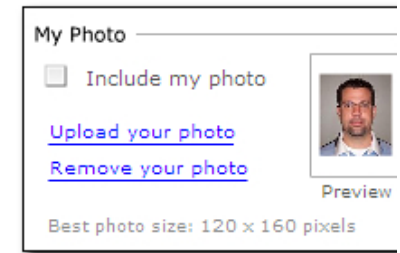


3. After confirming the preview, click the **Choose this theme** button to apply this theme to your entire site.
4. Then, click **Next** to continue.

## Step 2: Customize your Theme

To add a logo or personal photo:

1. Click the check box to turn on the **My Logo** or **My Photo** options.



2. Click either the Upload your logo or Upload your photo link.
3. From your **File Library**, choose a file and click **OK**.
4. Or, click the **Add New File** button. Click **Browse** to find the file on your system, then click **Open, Upload, OK**.

To change the background image:

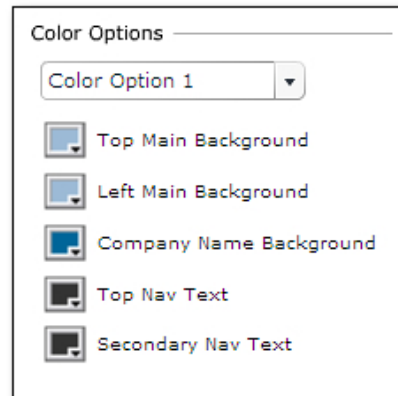
1. Click **Change your image** – shown under Background Image



2. Select an optional background image from the list provided and click **Upload**.
3. Or, click the **Upload a header** tab, and click the **Add New File** button. Click **Browse** to find the file on your system, then click **Open, Upload, OK**.

# Step by Step: Getting your XSite off the Ground

To change the color scheme of your site, select another color scheme from the drop-down menu under **Color Options**. Or, click any of the color boxes to choose a new color from the palette. Note that the corresponding section of the website image flashes as you hover over each color box.



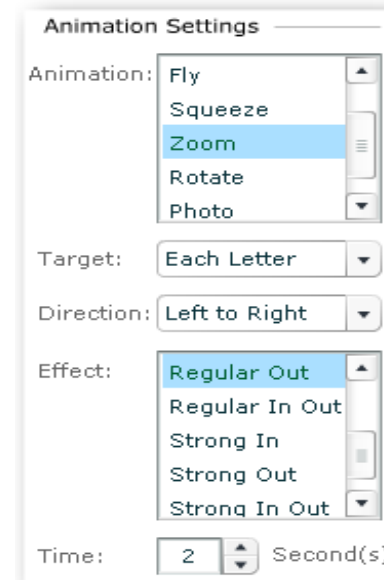
Your company name appears in the header of your XSite.

1. Click the **Include my company name** check box.
2. Type the name of your company in the larger field.
3. Use the text modification buttons to change the font style, size, weight and color of your company name. Depending on the theme you're using, you may need to change the text to a lighter color to show up on a darker background.



4. Type your company motto or other tag line in the smaller text box below it. This is more of a subheading.
5. Click and drag the elements to position them in the sample header.
6. When you've completed your theme modifications, click **Next**.

## Animating your Site Header



Make your company name "fly" in with style and pizzazz!

1. From the **Extra Tools** menu on the left, click **Header Animation**.
2. You'll need to use text for your company name and not a logo. If you haven't entered your company name yet, do it here.
3. Now, select your desired **Animation Settings** from the menus on the right. Depending upon the animation option you

choose in the top box, you'll need to make different choices for the **Target, Direction, Effect** and **Timing**. Naturally, you'll want to experiment with all the options, so click **Preview Animation** to see how each combination appears.

4. Once you've decided on the animation, just click the **Save**.

If you ever want to turn off the animation, just go back to this part of the wizard and select **None** for the animation type.

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## Step 3: Design your intro

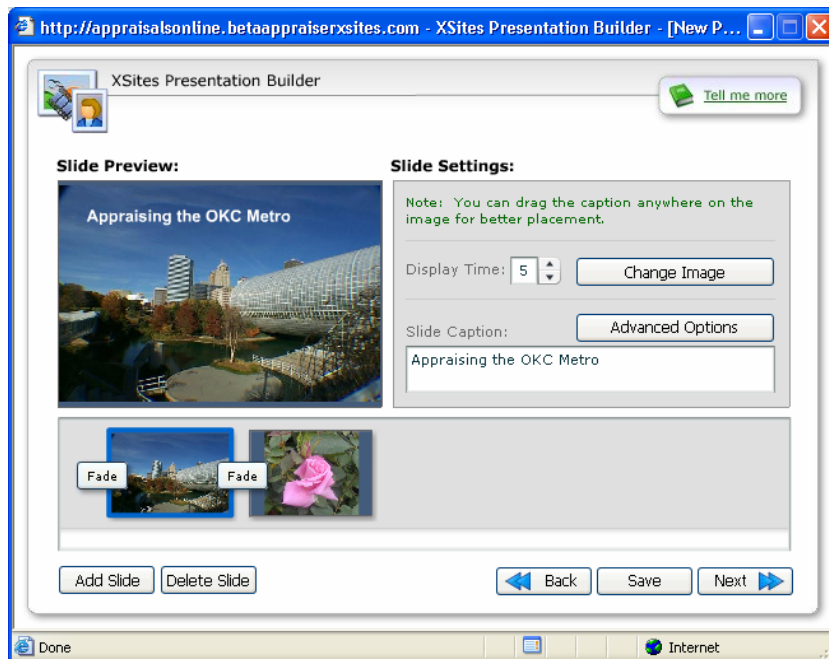
### Step 3: Design your intro

A Basic Intro already has preconfigured graphics and slides. You get to add the text and music:

1. Select the desired **Intro Template** from the list on the left
2. Select a music theme from the options on the right.
3. Enter the desired text in the five text boxes.
4. Choose a background color for your intro.
5. Click **Preview My Intro** to confirm the results

Advanced Intros are part of the Enterprise Appraiser XSites. With these, you can choose graphics for the slides, text and text animation effects.

1. Click the **Add New Intro** button
2. Type a name for your intro and click **Next**.



3. Pick a background color for your intro from the options provided, or click the white box on the right to choose a new color. Click **Next**.
4. Select a music theme from the list and click **Next**.
5. Click **Upload Image** to select a graphic to place on your first slide.
6. Type a phrase in the **Slide Caption** text box.
7. Click **Advanced Options** to adjust the font, and animation settings for your phrase.
8. Use the **Display Time** box to adjust how long this slide stays on screen.
9. Click the **Add Slide** button to add the next slide in your intro, then repeat the steps above. Click the **Save** button from time to time to save your settings as you work.
10. When you've added all of your slides, click the button located between each slide to change the transition effect as the slide changes.
11. When your intro is done, click **Next**.
12. Click **Preview Presentation** to proof your work. Use the links provided or click the **Back** button to return to previous steps and adjust your settings.
13. Click **Save & Close** to save all of your changes.
14. Select your new intro from the list and click **Next** to move on.

### Step 4: Adding sounds to your site

To add an audio dimension to your site:

1. Select a background music piece from the list on the left. This sound will play while visitors are viewing your site.
2. On the right, select the sound you would like played when a user moves their cursor over a button.
3. Click **Next** to move on.

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Step 5: Edit your company info

## Step 5: Edit your company info

This info is used throughout your site, and step 5 lets you make global changes, so you don't have to go through every page on your site when something like your e-mail address changes. Just click Search and Replace next to anything you change, and any page with that information on it will be automatically updated.

## Step 6: Enable online ordering

Online ordering is powered through our XSites Network. (Previously, this was known as the Mercury Network.) It gives your clients the ability to order online and download appraisals from your website instead of depending on e-mail. To configure your website to accept online appraisal orders, click the check box to **Enable Online Ordering**, Tracking, and Appraisal Report Delivery.


If you don't already have an XSites Network or an older Mercury account:

1. Click **Create a new profile on the XSites Network**.
2. Enter your information, picking a username and password for yourself, and click **Create New Account**.
3. Remember your new username and password for future use, then click **Next** to move on.

If you already have an account, simply enter your XSites (or older Mercury) Network login and password.

To learn more about online ordering, be sure to attend our class dedicated to processing orders over the web or at least click **Help** and browse to our extensive documentation about online ordering.

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 **Note:** By default, the owner of the XSite has permission to use its online order management features. However, if others have accounts on your XSite, you must update their **User Privileges** to give them access.

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The screenshot shows a web browser window titled "Order an Appraisal - Low Carb Appraisals Oklahoma City OK#top#top#top - Microsoft Internet Explorer". The address bar shows "https://appraisalsonline.betaappraiserxites.com/IFrame.a". The page header features the "Low Carb Appraisals" logo with the tagline "Where quality work isn't just a fad!!!". Navigation links include "Order an Appraisal", "Client Login", "About AVM's", "Our Service Area", and "Why Get an Appraisal". A sidebar on the left offers language selection ("Choose your language: English | Spanish") and a menu of services: Staff Profiles, Inspection Tips, Mortgage Calculators, Why Order Online?, Expert Witness, Appraisal Video, Mortgage fraud, What is USPAP?, Myths, Foreclosure/REO Appraisal, Mortgage Points Calc, and Home. The main content area contains a thank-you message and a disclaimer. Below this are three sections of form fields: "Assignment Information" (Due Date, Other Ref #, Loan Type, Ordered By, Lender, FHA #, MERS #, File #, Form/Type, Sales Price, Loan Amt, Est Value, Fee), "Payment Information" (Payment Method), and "Property Information" (Address, City, State, Zip Code, Prop Type, Legal Desc, Directions). A "Contact and Access Info" section is partially visible at the bottom.

## Step 7: Select and edit content

Your XSite comes preloaded with a wealth of content, professionally developed and translated into other languages.

1. In the **Provided Pages**, **Mortgage Calculators** and **Video Pages** tabs, click the check box next to the article or tool that you'd like to place on your site.
2. Click the name of the page to open it in the content to see what the page is about and even customize it. More about page customization is in our advanced XSite class.

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## Step 8: Organize your links

3. Turn on multilingual content by clicking the check box next to the language of your choice.

4. Click **Next** when you're ready to move on.

Creating your own custom web pages:

1. Create a new content page by clicking the **Your Custom Pages** tab and then the **Add a New Page** button.
2. In the content editor, you can type your new content as you would in a word processor. Most of the standard word processing commands are available from the buttons above the text screen. Or, you can copy/paste from a word process or other page.
3. When you've completed your document, click **Save**.



## Search and Replace

XSites contain a great feature that will run a search and replace on multiple pages at one time. This is useful for replacing generic phrasing in our provided content with something more personal.

1. Click **Search & Replace** under the Extra Tools section.
2. Enter the phrase you want to replace.
3. Now, type what you want it replaced with.
4. Select the pages on which you want your new text. You can use **Select All** to mark everything. There's no "undo" on the **Search and Replace** so you'll want to be sure about your new text.
5. Click the **Search & Replace** button.

Like all XSite functions, your changes are "live" instantly.

## Step 8: Organize your links

Move the content pages you've selected to the positions you'd like to see them on your site.

- Items under **Primary Navigation** appear at the top of your XSite.
- Items in the **Secondary Navigation** area appear below the primary navigation, either directly below or in the vertical menu bar, depending upon the theme you've chosen.
- Move items around by clicking and dragging.
- Add space between menu items by clicking the **Click here to add a new button separator** link. Separator lines can also be dragged up or down to place them.
- Indent an item to create a subheading by clicking the right arrow . Clicking the left arrow moves it back to its original position.
- You can create expandable, "nested" menus by clicking and dragging one page on top of another.

# Step by Step: Getting your XSite off the Ground

## Creating fly out menus

In the **Organize Content** step of the **XSites Wizard**, you can now create fly out menus within your secondary navigation. This can be a great way to enhance your site by providing a lot of relevant information for your clients without cluttering your site with buttons. Depending upon the theme you've chosen for your XSite, the fly out menu will appear when your site user moves their mouse over a particular menu item.



To create fly out menus:

1. Simply click and drag one of the button items on top of another button item in the **Secondary Navigation** area of the **Organize Content** step of the Wizard.
2. When the **Secondary Navigation** button that you want to turn into a fly out menu turns dark blue, drop the button item and it will automatically create a fly out menu.
3. To view the items in your fly out menu, simply click the + symbol next to your fly out menu and the menu items within it will display below that button item.
4. When your content is in place, click **Next** to move on.

## Step 9: Set the final preferences

This step mainly configures a consistent site footer.

1. Select the contact information you'd like displayed at the bottom of all pages on your site by clicking the check box to the left of each item.
2. Click the **Site Navigation** option to turn on navigation links at the bottom of each page. The **Customize** button allows you to select which specific links appear.
3. To create a custom footer that includes any text you desire, click the check box in the **Custom Footer** section, then click the **Customize** button to create your footer.
4. Click the final check box to include a link to your administration functions on your site. Of course, you'll still require your username and password to log in.
5. Click **Next** to move on to the final step.

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Step 10: Launch your site

## Step 10: Launch your site

More of a formality than another step, click the **Launch My XSite** button to open a new browser window and view the results of your labor. Of course, the changes you make to your site are saved and updated every time you click a **Save** or **Next** button, so all of your changes are safe. You can view your site at any time by clicking the **My XSite** button in the menu bar.

This page also displays some additional data and links to your site for your information.



The screenshot shows a web browser window displaying the 'Low Carb Appraisals' website. The browser's address bar shows 'http://www.lowcarbappraisals.com/content.aspx'. The website has a blue header with the text 'Low Carb Appraisals' and 'Where quality work isn't just a fad!!!'. Below the header, there are several navigation buttons: 'Order an Appraisal', 'Client Login', 'About AVMs', 'Our Service Area', and 'Why Get an Appraisal'. The main content area features a welcome message, a photo of a man and a woman, and a language selection menu. There are also sections for 'Today's Top Real Estate News' and 'Today's Rates'.

Real Estate Appraisal - home appraisal - appraiser - real estate appraiser - residential apprai - Microsoft Internet...  
File Edit View Favorites Tools Help  
Address http://www.lowcarbappraisals.com/content.aspx Go Back

**Low Carb Appraisals**  
Where quality work isn't just a fad!!!

Order an Appraisal  
Client Login

About AVMs  
Our Service Area  
Why Get an Appraisal

Welcome to Low Carb Appraisals! We're the leading provider of fast and accurate home valuations in Oklahoma City, Edmond, Moore & Norman.

Choose your language  
English | Spanish

Staff Profiles  
Inspection Tips  
Mortgage Calculators  
Why Order Online?  
Expert Witness  
Appraisal Video  
Mortgage Fraud  
What is USPAP?  
Myths  
Foreclosure/REO Appraisal  
Mortgage Points Calc  
Home

With 12 years of experience of doing appraisals in Oklahoma City, we have a proven track record of streamlining the appraisal process and ensuring we're not the "hold up" when it comes to closing time.

Our investment in training and technology has helped our customers greatly reduce their workload. By offering on-line appraisal ordering, coupled with automatic report status updates and electronic delivery of the final product, we are able to eliminate the run around and phone tag hassles associated with this process. And since this process saves us money as well, we can keep our rates competitive with anybody in the industry.

**Today's Top Real Estate News:**  
Provided by Inman News - Saturday, July 16, 2005  
[New ranges, cabinetry improve kitchen design](#)  
[Picking the perfect paint for home exterior](#)  
[Some real estate theft won't land you in jail](#)  
[Real estate fix-up costs for tax deduction clarified](#)  
[Condo conversion craze puts renters' rights to the test](#)  
[More news...](#)

Mobile Notification  
[Click here](#)

**Today's Rates:**

Mtg Loan	Rate	APR
30-yr Fixed	5.24%	5.38%
15-yr Fixed	4.82%	5.06%
1-yr Adj	4.7%	5.75%

\* national averages

## CertMail and User Management

Now that we've launched your XSite, let's take a moment discuss CertMail and additional XSite users – features available in our Professional and Enterprise level Appraiser XSites.

Note: Due to limitations of our teaching environment, students in our hands on classes may not be able to follow along with portions of the class concerning CertMail and User Management.

## Introduction to CertMail

Part of the value of having your own domain is having e-mail addresses at that domain – that's what CertMail is.

Using your own domain is much more professional than a generic Hotmail, gMail, Yahoo! or similar service.

- ❑ CertMail can be accessed using just a web browser. Just log into your XSite My Office and click the link for CertMail. Or go to [www.certmail.com](http://www.certmail.com) and log in with your XSite login.
- ❑ Or, you can access it using Microsoft Outlook since our servers support standard "POP3" and "SMTP" protocols just like the mail services provided by ISP's. (Instructions for connecting with Outlook are in the XSite User Guide.)

CertMail goes above and beyond most e-mail in several ways.

- ❑ We support the advanced IMAP protocol so that e-mail stays on our servers and isn't downloaded to your local PC necessarily. This is handy when you have to access e-mail from multiple computers.
- ❑ CertMail incorporates our popular SureReceipts system, so that you get notification when messages are read and attachments downloaded.
- ❑ Virus protection and SPAM filtering are also included.



