



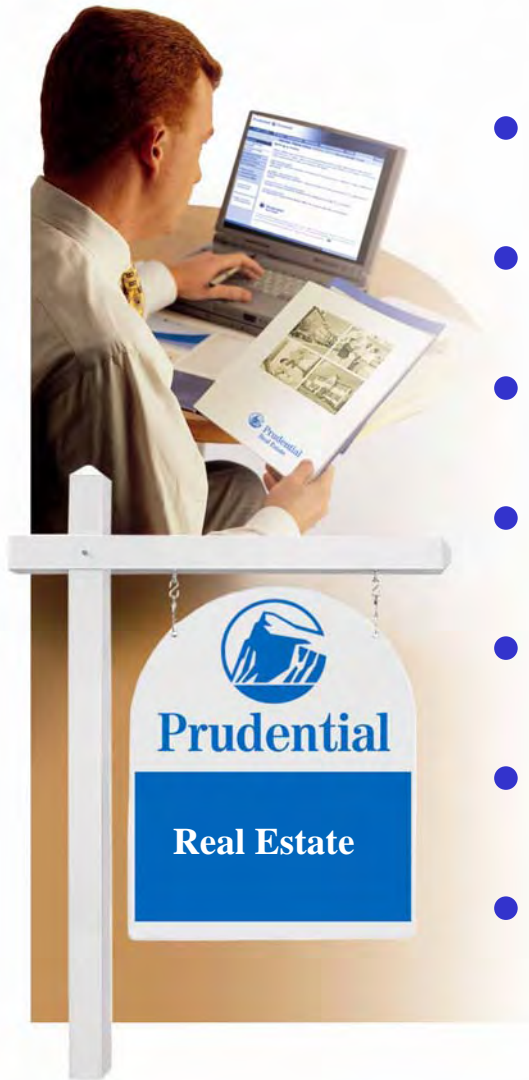
# Getting the Most From eCards



**Prudential**  
Real Estate

# eCards

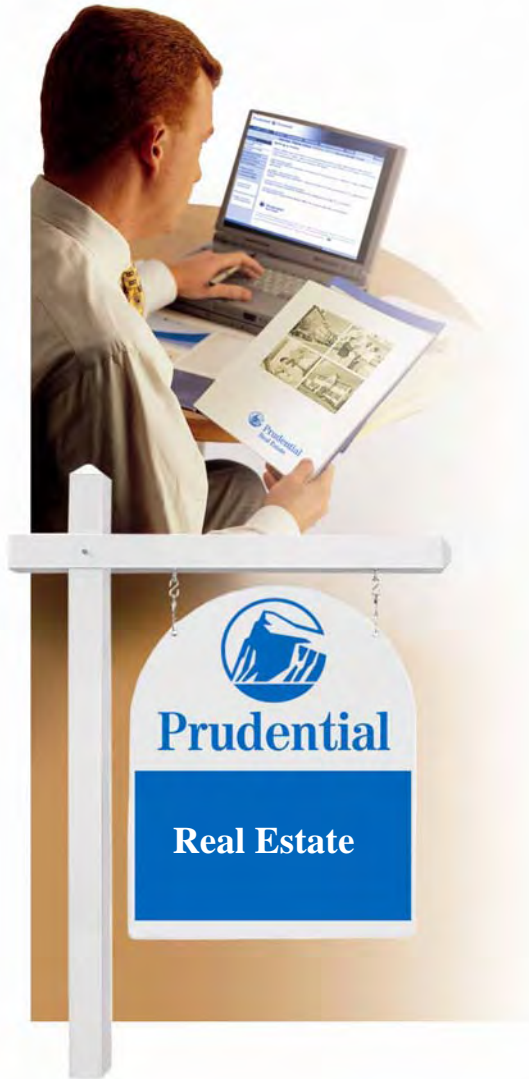
PRUDENTIAL  
University



- **Exclusive to Prudential Real Estate**
- **Accessible online at PREA Center**
- **Easy to customize**
- **More options than ever before**
- **Over 200 templates**
- **Reporting options**
- **Available to all sales professionals**



# Lessons



- 1. Access the eCard site and explore the eCard features**
- 2. Review steps in creating and sending an eCard**
- 3. Overview available reports and administrative tools within the Reporting Section**



# Getting the Most From eCards



1

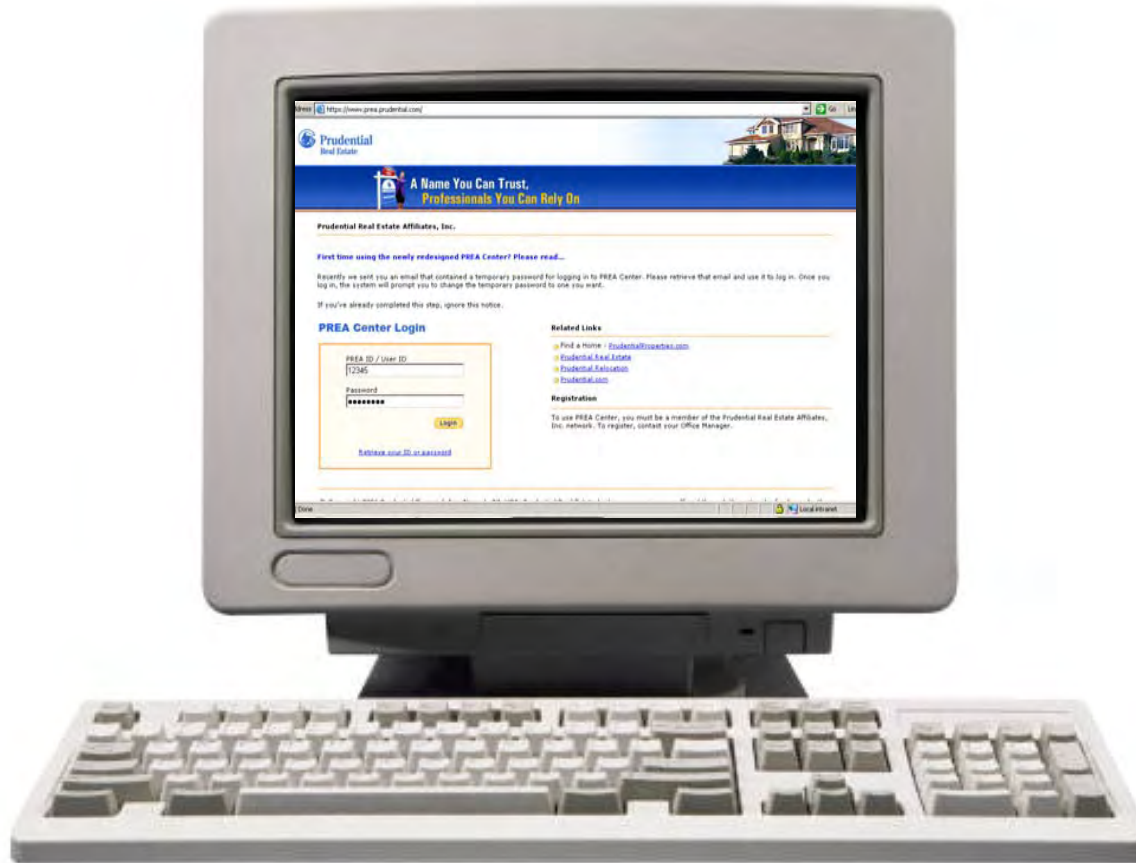
Lesson

- ❖ **Access the eCard site and explore the eCard features**



# PREA Center

**PRUDENTIAL**  
University



[www.prea.prudential.com](http://www.prea.prudential.com)

# PREA Center

PRUDENTIAL  
University



A Name You Can Trust,  
Professionals You Can Rely On

Prudential Real Estate Affiliates, Inc.

First time using the newly redesigned PREA Center? Please read...

Recently we sent you an email that contained a temporary password. When you log in, the system will prompt you to change the temporary password.

If you've already completed this step, ignore this message.

Enter your Login  
ID and Password

When you log in to the PREA Center, please retrieve that email and use it to log in. Once you

## PREA Center Login

PREA ID / User ID

Password

[Retrieve your ID or password](#)

### Related Links

- Find a Home - [PrudentialProperties.com](http://PrudentialProperties.com)
- [Prudential Real Estate](#)
- [Prudential Relocation](#)
- [Prudential.com](#)

### Registration

To use PREA Center, you must be a member of the Prudential Real Estate Affiliates, Inc. network. To register, contact your Office Manager.

# Accessing the eCard Site

PRUDENTIAL  
University

My Profile | Support | Company Locator | Site Map | Log Off



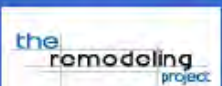
Home Welcome, Dohn Bower (X129083)

Go

- Administration
- Affluent Markets
- Awards
- Benefits and Discounts
- Broker/Manager Tools
- Commercial Services
- Community Programs
- Education
- Events
- Marketing
- Operations Review

## Sales Professional Tools

### Suppliers



Once logged in,  
follow the Quick Link  
to the eCards section.

### What's New

[Talent Search for Sales Convention 2017](#)  
[We've enhanced PREA Center!](#)

- [All Courses](#)
- [eCards](#)
- [eCertified@](#)
- [Events Schedule](#)

### Quick Links

- [Homeselling System](#)
- [Merrill Corporation](#)
- [Postcard Program](#)
- [The Wall Street Journal](#)

### Messages

[0 Unread Messages](#)  
[0 Read Messages](#)

## News Stand

### Top Story

#### New Affiliates Join Prudential Real Estate

[Read more](#) about Prudential Real Estate welcoming its newest affiliates...

### Consumer News

- [Watch Out For Nontraditional Foreclosure Contracts](#)
- [Mortgage Rates Come in Mixed This](#)

### Prudential News

- [See Bill Barrett and Mike Ferry During Tuesday's Super Sessions](#)
- [Network Members' Children Awarded for Volunteerism](#)

### Industry News

- [Fighting Back Against Housing Discrimination](#)
- [Rising US Foreclosures, Slumping Sales Suggest Affordability Is The Problem With Housing Market](#)

# Accessing the eCard Site

PRUDENTIAL  
University

The screenshot shows the Prudential Real Estate website interface. At the top right, there are links for "My Profile", "Support", "Company Locator", "Site Map", and "Log Off". The main header features the Prudential Real Estate logo and a "DREA Center" banner. Below the header is a navigation bar with "Home" and "Welcome, Dohn Bower (X129083)". A left-hand navigation menu lists various categories: Administration, Affluent Markets, Awards, Benefits and Discounts, Broker/Manager Tools, Commercial Services, Community Programs, Education, Events, Marketing, Operations Review, Roster Management, Sales Professional Tools, and Suppliers. The main content area is titled "eCards" and features a section for the "Exclusive eCertified® Benefit Program". A yellow callout box with a red border points to a link in the text, and another red-bordered box highlights the link itself.

My Profile | Support | Company Locator | Site Map | Log Off

Prudential Real Estate

Home Welcome, Dohn Bower (X129083)

Administration  
Affluent Markets  
Awards  
Benefits and Discounts  
Broker/Manager Tools  
Commercial Services  
Community Programs  
Education  
Events  
Marketing  
Operations Review  
Roster Management  
Sales Professional Tools  
Suppliers

eCards

Exclusive eCertified® Benefit Program

**Showcasing:** Investing Women Series.  
*Twice as many single women purchased homes last year as single men. Why not add this group of women with money who are adding real estate to their portfolios to your target markets. This series of attractive eCards can keep you in front of these busy women. Program one eCard every other week to be sent out automatically.*

Get started by visiting the [eCard site](#) now.

As an eCertified® professional, you've proven you can handle business online. Prudential Real Estate offers free, unlimited and exclusive use of our customizable eCards as one of the benefits of being eCertified®. eCards are online postcards you can send to your customers through email.

So far this year more than 14 million eCards have been sent by Prudential Real Estate sales professionals including just listed/just sold, general prospecting, holiday greetings, recruiting, and client follow-up. You can choose from over 200 eCards to suit your needs. Customize eCards with personal and property photos or include links to virtual tours, maps for open house visitors and property flyer information. Use eCards as an easy way to prospect with today's technology.

It's free and it works.



# eCard Home Page



## HOME

[SEND eCARD](#)

[ADDRESS BOOK](#)

[REPORTING](#)

[ACCOUNT PROFILE](#)

[LIST BUILDER](#)

[HELP CENTER](#)

[RETURN TO PREA CENTER](#)

### > WELCOME

Start a new eCard with the SEND eCARD button to the left.

Use the tabs below to browse between in progress, pending, scheduled and sent eCards.

Review reporting for all sent eCards with the REPORTING button to the left.

### > GETTING STARTED

Just getting started? Go to the HELP CENTER for more information and instructions.

[HELP CENTER](#)

### > ECARDS

[IN PROGRESS](#)

[PENDING APPROVAL](#)

[SCHEDULED](#)

[SENT](#)

TYPE TITLE

RECIPIENTS

URLS

QUESTIONS

FILES

CREATED

### > BLOCKED ECARDS?

Some Internet Service Providers or corporate email filters may block your email eCard.

To resolve this, contact the IT department or email administrator asking for the following details to be placed on the safe sender and/or white list:

Domain: tlcollect.com  
IP: 210.193.131.133

### > MORE FROM ECARDS

Get the most from eCards by viewing the online demo.

[VIEW DEMO](#)

### > RECENT UPDATES

- > [Recipient web tracking](#) - 29 Jun
- > [Multi-page reporting](#) - 29 Jun
- > [System settings](#) - 29 Jun
- > [Search shared groups](#) - 29 Jun
- > [Suppression Lists](#) - 10 May
- > [Sorting responses](#) - 10 May

[MORE](#)

# Recent Updates



## Recent Updates



HOME

SEND eCARD

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

RETURN TO PREA CENTER

WELCOME

Start a new eCard with the SEND eCARD button to the left.

Use the tabs below to browse between in progress, pending, scheduled and sent eCards.

Review reporting for all sent eCards with the REPORTING button to the left.

GETTING STARTED

Just getting started? Go to the HELP CENTER for more information.

HELP CENTER

ECARDS

IN PROGRESS

PENDING APPROVAL

SCHEDULED

SENT

TYPE

TITLE

RECIPIENTS

URLS

QUESTIONS

FILES

CREATED

BLOCKED ECARDS?

Some Internet Service Providers or corporate email filters may block your email eCard.

To resolve this, contact the IT department or email administrator asking for the following details to be placed on the safe sender and/or white list:

Domain: tlcollect.com  
IP: 210.193.131.133

MORE FROM ECARDS

Get the most from eCards by viewing our online demo.

VIEW DEMO

RECENT UPDATES

- > [Recipient web tracking](#) - 29 Jun
- > [Multi-page reporting](#) - 29 Jun
- > [System settings](#) - 29 Jun
- > [Search shared groups](#) - 29 Jun
- > [Suppression Lists](#) - 10 May
- > [Sorting responses](#) - 10 May

MORE



# Additional Updates



- Send Test
- Web Tracking
- Campaign Reporting Notification
- Yahoo! Maps
- Combined Campaign Reporting

# eCard Table

HOME

SEND eCARD

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

RETURN TO PREA CENTER

WELCOME

Start a new eCard with the SEND eCARD button to the left.

Use the tabs below to browse between in progress, pending, scheduled and sent

Start eCards with the SORTING button to the left.

BLOCKED ECARDS?

Some Internet Service Providers or corporate email filters may block your email eCard.

To resolve this, contact the IT department or email administrator asking for the following details to be placed on the safe sender and/or white list:

Domain: tlcollect.com  
IP: 210.193.131.133

MORE FROM ECARDS

Get the most from eCards by viewing the online demo.

VIEW DEMO

RECENT UPDATES

- > [Recipient web tracking](#) - 29 Jun
- > [Multi-page reporting](#) - 29 Jun
- > [System settings](#) - 29 Jun
- > [Search shared groups](#) - 29 Jun
- > [Suppression Lists](#) - 10 May
- > [Sorting responses](#) - 10 May

MORE

**eCards Table**

IN PROGRESS PENDING APPROVAL SCHEDULED SENT

TYPE	TITLE	RECIPIENTS	URLS	QUESTIONS	FILES	CREATED
EML	<a href="#">Just Listed - 125Carrisbrooke</a>	1	0	2	0	27 Jan 06
EML	<a href="#">Just Listed in Carrisbrooke</a>	1	1	1	1	10 Jun 05

> VIEW ALL IN PROGRESS ECARDS

> CREATE NEW ECARD

# Navigation Bar

## Navigation Bar

HOME

SEND eCARD

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

RETURN TO PREA CENTER

### WELCOME

Start a new eCard with the SEND eCARD button to the left.

Use the tabs below to browse between in progress, pending, scheduled and sent eCards.

Review reporting for all sent eCards with the REPORTING button to the left.

### BLOCKED ECARDS?

Some Internet Service Providers or corporate email filters may block your email eCard.

To resolve this, contact the IT department or email administrator asking for the following details to be placed on the safe sender and/or white list:

Domain: tlcollect.com  
IP: 210.193.131.133

### MORE FROM ECARDS

Get the most from eCards by viewing the online demo.

[VIEW DEMO](#)

### RECENT UPDATES

- > [Recipient web tracking](#) - 29 Jun
- > [Multi-page reporting](#) - 29 Jun
- > [System settings](#) - 29 Jun
- > [Search shared groups](#) - 29 Jun
- > [Suppression Lists](#) - 10 May
- > [Sorting responses](#) - 10 May

[MORE](#)

### GETTING STARTED

Just getting started? Go to the HELP CENTER for more information and instructions.

[HELP CENTER](#)

### ECARDS

IN PROGRESS

PENDING APPROVAL

SCHEDULED

SENT

TYPE

TITLE

RECIPIENTS

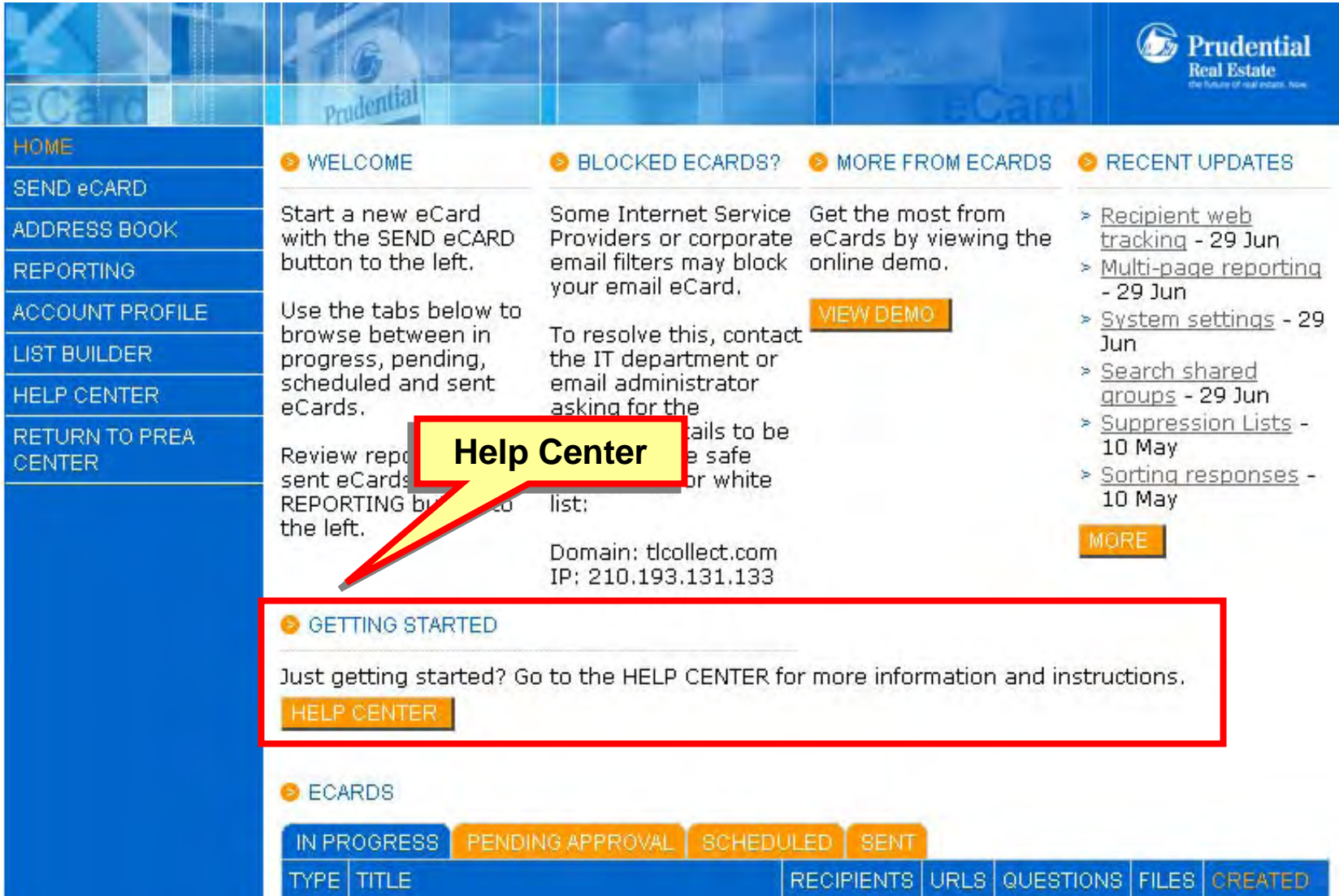
URLS

QUESTIONS

FILES

CREATED

# Getting Started



**Prudential Real Estate**  
the future of real estate. Now.

**HOME**  
SEND eCARD  
ADDRESS BOOK  
REPORTING  
ACCOUNT PROFILE  
LIST BUILDER  
HELP CENTER  
RETURN TO PREA CENTER

**WELCOME**  
Start a new eCard with the SEND eCARD button to the left.  
Use the tabs below to browse between in progress, pending, scheduled and sent eCards.  
Review reports for sent eCards  
REPORTING button to the left.

**BLOCKED ECARDS?**  
Some Internet Service Providers or corporate email filters may block your email eCard.  
To resolve this, contact the IT department or email administrator asking for the  
... emails to be  
... safe  
... or white  
... list:  
Domain: tcollect.com  
IP: 210.193.131.133

**MORE FROM ECARDS**  
Get the most from eCards by viewing the online demo.  
**VIEW DEMO**

**RECENT UPDATES**  
> [Recipient web tracking](#) - 29 Jun  
> [Multi-page reporting](#) - 29 Jun  
> [System settings](#) - 29 Jun  
> [Search shared groups](#) - 29 Jun  
> [Suppression Lists](#) - 10 May  
> [Sorting responses](#) - 10 May  
**MORE**

**GETTING STARTED**  
Just getting started? Go to the HELP CENTER for more information and instructions.  
**HELP CENTER**

**ECARDS**  
IN PROGRESS PENDING APPROVAL SCHEDULED SENT

TYPE	TITLE	RECIPIENTS	URLS	QUESTIONS	FILES	CREATED
------	-------	------------	------	-----------	-------	---------

# Help Center

Download the  
"eCards Getting  
Started Guide"

- HOME
- SEND eCARD
- ADDRESS BOOK
- REPORTING
- ACCOUNT PROFILE
- LIST BUILDER

## HELP CENTER

Welcome to the Prudential Real Estate eCards HELP CENTER.

If you have a support query, try locating the query in the Knowledge Base. If you have a new support query, submit a new query below.

## SUBMIT NEW QUERY

Submit a new support query.

[SUBMIT NEW QUERY](#)

## REVIEW CURRENT QUERIES

Review your current support queries.

[REVIEW CURRENT QUERIES](#)

## USER GUIDE

If you are just getting started with Prudential Real Estate eCards, download the Getting Started Guide.

The guide explains the basic steps of the send eCard process as well as reporting information.

Adobe Reader is required to view the Getting Started Guide. It can be downloaded for free.

[DOWNLOAD GUIDE](#)

[DOWNLOAD ADOBE READER](#)

## HELP CENTER

- > REVIEW QUERIES
- > KNOWLEDGE BASE
- > TUTORIALS
- > DOWNLOAD GUIDE

[RETURN TO PREVIOUS CENTER](#)

Submit New  
Query

# Help Center - Submit Query

HOME  
SEND eCARD  
ADDRESS BOOK  
REPORTING  
ACCOUNT PROFILE  
LIST BUILDER  
**HELP CENTER**  
> SUBMIT QUERY  
> KNOWLEDGE BASE  
> TUTORIALS  
> DOWNLOAD GUIDE  
RETURN TO PREA CENTER

Prudential  
Real Estate

Prudential  
Real Estate

HELP CENTER > SUBMIT QUERY

Title  
groups

NEXT

INSTRUCTIONS

Enter an appropriate and descriptive title.

For faster and more relevant results, do not use a non-descriptive title such as "I have a problem".

Once the title is entered, click the NEXT button.

Enter subject or keyword and click "NEXT"



# Help Center - Submit Query

HOME  
SEND eCARD  
ADDRESS BOOK  
REPORTING  
ACCOUNT PROFILE  
LIST BUILDER  
HELP CENTER  
    > **SUBMIT QUERY**  
    > REVIEW QUERIES  
    > KNOWLEDGE BASE  
    > TUTORIALS  
    > DOWNLOAD GUIDE  
RETURN TO PREA CENTER

**HELP CENTER > SUBMIT QUERY**

The following Knowledge Base articles may answer your query.

TITLE	CATEGORY
<a href="#">Delete group</a>	Address Book - General
<a href="#">Delete group and recipients</a>	Address Book - General
<a href="#">Shared group</a>	Address Book - General
<a href="#">Add group to address book</a>	Address Book - General
<a href="#">Locating contacts not in groups</a>	Address Book - General
<a href="#">Share a group of contacts</a>	Address Book - General
<a href="#">Contacts in multiple groups</a>	Address Book - General

**INSTRUCTIONS**

Knowledge Base articles with similar titles to your entered query title are listed in the table to the left.

These articles may already answer your query. Click on the title to read the Knowledge Base article.

If the listed Knowledge Base articles do not answer your query, continue with a new query below.

**Select appropriate article**

# Help Center - Submit Query

- HOME
- SEND eCARD
- ADDRESS BOOK
- REPORTING
- ACCOUNT PROFILE
- LIST BUILDER
- HELP CENTER
  - > SUBMIT QUERY
  - > REVIEW QUERIES
  - > KNOWLEDGE BASE
  - > TUTORIALS
  - > DOWNLOAD GUIDE
- RETURN TO PREA CENTER

▶ HELP CENTER > KNOWLEDGE BASE

Review the Knowledge Base article below.

TITLE	Shared group
CATEGORY	Address Book - General

▶ QUESTION

What is a shared group and how can it be used?

▶ SOLUTION

A shared group is a group of contacts in an address book that has been shared by the owner.

This means that anyone within the company has access to the group of contacts to send emails to.

Note that only the owner can edit or delete contacts in a shared group. Other users can only view and send to the group.

To view all shared groups within your company, follow this process:

▶ KEYWORD SEARCH

Search for keywords:

**System opens the question**

▶ OTHER CATEGORIES

Select another article category:

Account Profile - General

LIST CATEGORY ARTICLES

**And gives the solution**

# Help Center - Knowledge Base



Select from all articles

- HOME
- SEND eCARD
- ADDRESS BOOK
- REPORTING
- ACCOUNT PROFILE
- LIST BUILDER
- HELP CENTER
  - > SUBMIT QUERY

> KNOWLEDGE BASE

- > TUTORIALS
- > DOWNLOAD GUIDE

RETURN TO PREA CENTER

HELP CENTER > KNOWLEDGE BASE: CATEGORIES

Select a category to view the corresponding Knowledge Base articles.

CATEGORY	ARTICLES
<a href="#">Account Profile - General</a>	6
<a href="#">Account Profile - Managing Users</a>	3
<a href="#">Account Profile - Upload Image</a>	1
<a href="#">Address Book - Exporting</a>	1
<a href="#">Address Book - General</a>	17
<a href="#">Address Book - Importing</a>	12
<a href="#">Address Book - Searching</a>	2
<a href="#">SEND eCARD - Confirm and Send</a>	6
<a href="#">SEND eCARD - Content</a>	7
<a href="#">SEND eCARD - Files and Links</a>	1
<a href="#">SEND eCARD - Questions</a>	1
<a href="#">SEND eCARD - Recipients</a>	1

KEYWORD SEARCH

Search for keywords:

SEARCH

Search for keywords

# Help Center - Knowledge Base



HOME  
SEND eCARD  
ADDRESS BOOK  
REPORTING  
ACCOUNT PROFILE  
LIST BUILDER  
HELP CENTER  
    > SUBMIT QUERY  
    > REVIEW QUERIES  
    > KNOWLEDGE BASE  
    > TUTORIALS  
    > DOWNLOAD GUIDE  
RETURN TO PREA CENTER

Prudential Real Estate

HELP CENTER > KNOWLEDGE BASE: CATEGORY ARTICLES

Select the Knowledge Base article to read it.

TITLE	QUESTION
<a href="#">Account Profile personal image</a>	How do I add my Account Profile personal image?
<a href="#">Change password</a>	How do I change my password?
<a href="#">Change user name</a>	Can I change my user name?
<a href="#">Correct size and format for company logo</a>	What is the correct size for the company logo?
<a href="#">Correct size and format for personal photo</a>	What is the correct size for the personal photo? What format should it be saved/stored in?
<a href="#">Update account profile details</a>	How do I change my account profile details?

KEYWORD SEARCH

Search for keywords:

SEARCH

OTHER CATEGORIES

Select another article category:

Account Profile - General

LIST CATEGORY ARTICLES

**Select appropriate article**

# Help Center - Knowledge Base

HOME

SEND eCARD

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

> SUBMIT QUERY

> REVIEW QUERIES

> KNOWLEDGE BASE

> TUTORIALS

> DOWNLOAD GUIDE

RETURN TO PREA  
CENTER

> HELP CENTER > KNOWLEDGE BASE

Review the Knowledge Base article below.

TITLE Account Profile personal image

CATEGORY Account Profile - General

> QUESTION

How do I add my Account Profile personal image?

> SOLUTION

To add your personal photo which will appear on some templates, follow this procedure:

1. Log into the system
2. Click the ADD & EDIT SENDER PROFILES button
3. Your account profile will then be listed. Click the ADD PHOTO button.
4. Click the Browse button to locate your photo on your PC. Click the Open button and then the UPLOAD button.

> KEYWORD SEARCH

Search for keywords:

System opens the question

> OTHER CATEGORIES

Select another article category:

Account Profile - General

CATEGORY ARTICLES

And gives the solution

# Tutorials

HOME

SEND eCARD

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

> SUBMIT QUERY

> REVIEW QUERIES

TUTORIALS

RETURN TO PREA  
CENTER

➤ HELP CENTER > TUTORIALS

To read the tutorial click on the title.

TITLE	SUMMARY	CREATED
<a href="#">Combined reporting</a>	Put the calculator away and let Reporting combine reports for you.	25 Oct 05
<a href="#">Customising your SMS caller ID.</a>	Customising your SMS caller ID.	19 Jul 05
<a href="#">Exporting eCard reports</a>	Export eCard reports to Excel for presentations	20 Sep 05
<a href="#">How to include downloadable files in your eCard message</a>	How to include downloadable files in your eCard message. Doing this may improve the chances of a file download.	14 Apr 05
<a href="#">Image uploading and editing</a>	Image uploading and editing	15 Feb 05
<a href="#">Linking to a print friendly eCard</a>	Print friendly: How to link to a print friendly version of your eCard	20 Jan 05
<a href="#">PDF downloading problems</a>	How to help minimise possible PDF downloading problems	20 Mar 05
<a href="#">Personalising email eCards</a>	Personalising email eCards with the recipient's details	10 Jan 05
<a href="#">Questions and recipient feedback</a>	Using questions to gain recipient feedback	24 May 05

# Tutorials

- HOME
- SEND eCARD
- ADDRESS BOOK
- REPORTING
- ACCOUNT PROFILE
- LIST BUILDER
- HELP CENTER
  - > SUBMIT QUERY
  - > REVIEW QUERIES
  - > KNOWLEDGE BASE
  - > TUTORIALS
  - > DOWNLOAD GUIDE
- RETURN TO PREA CENTER

## HELP CENTER > TUTORIALS: PERSONALISING EMAIL ECARDS

Personalising attention a

A simple w similar to:

"Hi (Recipient

(When the substituted

How do I p

To personalise the message, use the "Insert" button (right).

You can then customise the option would

When the First Name

email eCard, the text "(Recipient's First Name)" will be substituted with their actual first name, as specified in your address book.

### CREATE CAMPAIGN > CONTENT: HTML

Enter the HTML content below. Refer to the right for instructions.

HTML PRINT FRIENDLY PLAIN TEXT PERSONAL IMAGE INACTIVITY LOGOUT IN: 15:51

> INDEX > RESET > SAVE

Insert recipient details

- Insert recipient details
- Salutation
- First Name
- Last Name
- Email Address
- Company
- Gender
- Date of Birth
- Street
- City
- State

As we are personalising the introduction, select the "First Name" detail.

Next

# Account Profile

HOME

SEND eCARD

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

> PROFILES

LIST BUILDER

HELP CENTER

RETURN TO PREA  
CENTER

## ACCOUNT PROFILE

Edit your sender profile.

PROFILES

SETTINGS

IMAGE



REMOVE

DETAILS

Name: Agent 24/7

Email: [agent24.7@mywebsite.com](mailto:agent24.7@mywebsite.com)

Company: Prudential Real Estate

Address: 3 CA 92612

Telephone:

Fax: 864-200

Add and edit  
profiles



ADD & EDIT PROFILES



# Add New Sender Profile

ACCOUNT PROFILE > SENDER PROFILES

Edit and add photos to the default and alternate sender profiles.

DEFAULT PROFILE	ALTERNATE PROFILES		
IMAGE	NAME	DETAILS	ACTIVITY
	Agent 24/7	Email: <a href="mailto:agent24.7@mywebsite.com">agent24.7@mywebsite.com</a> Company: Prudential Real Estate Address: 3333 Michelson Drive Irvine CA 92612 Telephone: 555-333-1111 Web: <a href="http://www.mywebsite.com">http://www.mywebsite.com</a>	EDIT ADD PHOTO DEL PHOTO
	Dohn Bower, Prudential Real Estate Affiliate	Email: Address: 3333 Michelson Drive, Suite 1000 Irvine CA 92612 USA Telephone: 949-794-1111 Web: <a href="http://www.prea.prudential.com">http://www.prea.prudential.com</a>	EDIT ADD PHOTO

**Add New Sender Profile**

**ADD NEW SENDER PROFILE**

INSTRUCTIONS

A sender profile is the name, email address and other optional details that appear to the recipient on a sent eCard.

By default, all eCards are sent using the default sender profile, as listed under the DEFAULT PROFILE heading to the left.

To edit this profile or add/remove a photo, click the appropriate buttons in the ACTIVITY column.

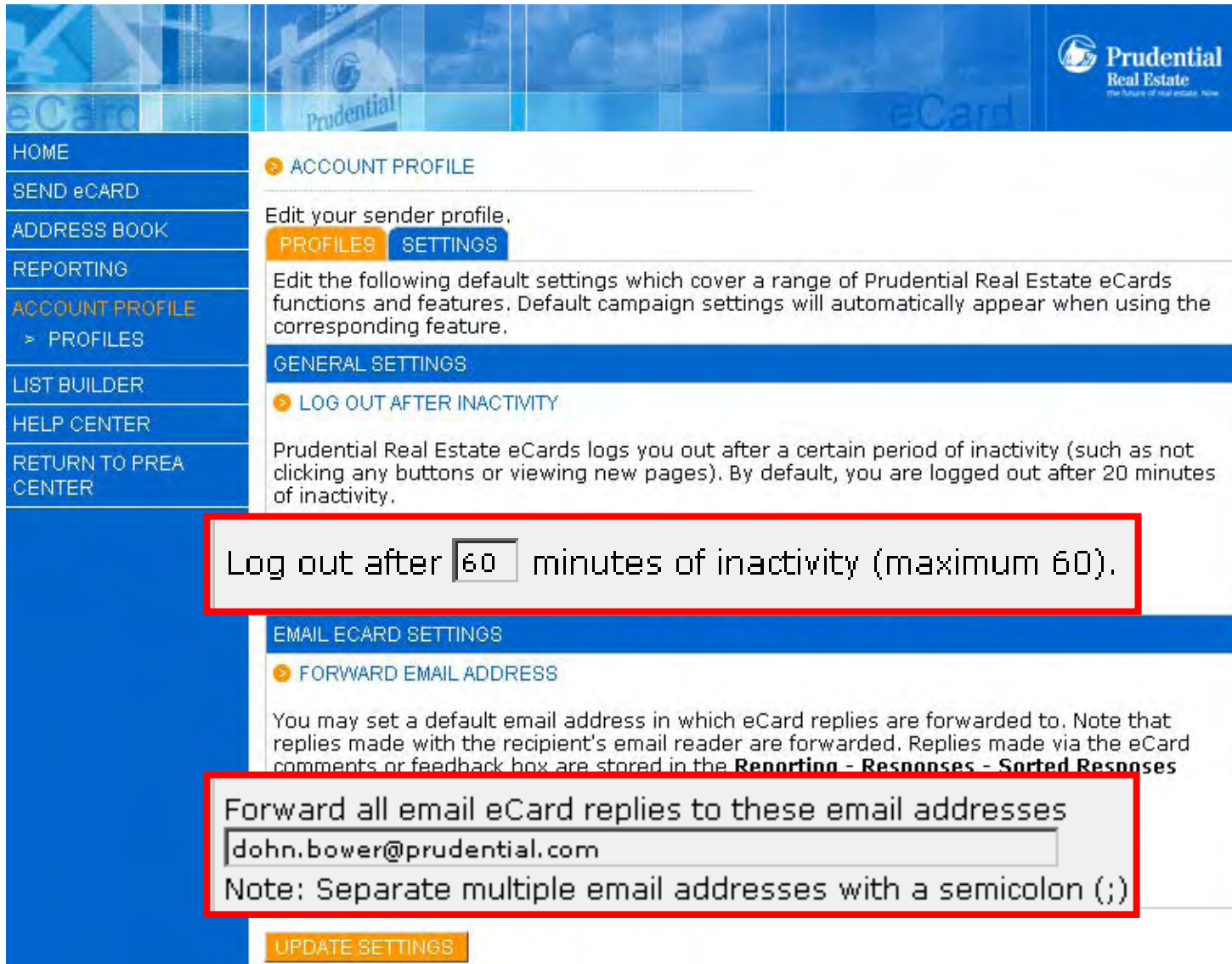
Optionally, the eCard can be sent using an alternate sender profile. For example, if the default sender profile is listed as "John Citizen", a sender profile can be setup to send eCards using the name "Mary Citizen".

To create a new sender profile, click the ADD NEW SENDER PROFILE button. Once the details have been complete, the new sender profile will be listed under the ALTERNATE PROFILES button.

To edit any alternate profile or add/remove a photo, click the appropriate buttons in the ACTIVITY column.

To send the eCard using an

# Account Profile - Settings



The screenshot shows the 'ACCOUNT PROFILE' settings page. The left sidebar contains navigation links: HOME, SEND eCARD, ADDRESS BOOK, REPORTING, ACCOUNT PROFILE (selected), LIST BUILDER, HELP CENTER, and RETURN TO PREA CENTER. The main content area is titled 'ACCOUNT PROFILE' and includes a sub-section 'GENERAL SETTINGS' with a 'LOG OUT AFTER INACTIVITY' option. A red box highlights the '60' value in the 'Log out after' field. Below this, the 'EMAIL ECARD SETTINGS' section is visible, with a 'FORWARD EMAIL ADDRESS' option. A red box highlights the text 'Forward all email eCard replies to these email addresses' and the input field containing 'dohn.bower@prudential.com'. A note below the input field states: 'Note: Separate multiple email addresses with a semicolon (;)'. At the bottom, there is an 'UPDATE SETTINGS' button.

HOME

SEND eCARD

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

> PROFILES

LIST BUILDER

HELP CENTER

RETURN TO PREA CENTER

ACCOUNT PROFILE

Edit your sender profile.

PROFILES SETTINGS

Edit the following default settings which cover a range of Prudential Real Estate eCards functions and features. Default campaign settings will automatically appear when using the corresponding feature.

GENERAL SETTINGS

LOG OUT AFTER INACTIVITY

Prudential Real Estate eCards logs you out after a certain period of inactivity (such as not clicking any buttons or viewing new pages). By default, you are logged out after 20 minutes of inactivity.

Log out after  minutes of inactivity (maximum 60).

EMAIL ECARD SETTINGS

FORWARD EMAIL ADDRESS

You may set a default email address in which eCard replies are forwarded to. Note that replies made with the recipient's email reader are forwarded. Replies made via the eCard comments or feedback box are stored in the **Reporting - Responses - Sorted Responses**

Forward all email eCard replies to these email addresses

Note: Separate multiple email addresses with a semicolon (;)

UPDATE SETTINGS

# Address Book



HOME

ADDRESS BOOK

SEARCH

## ADDRESS BOOK

Listed in the table below are the individual contacts in your address book.

Look for

Click the "EDIT" button to edit the contact's details.

SEARCH

ADVANCED SEARCH

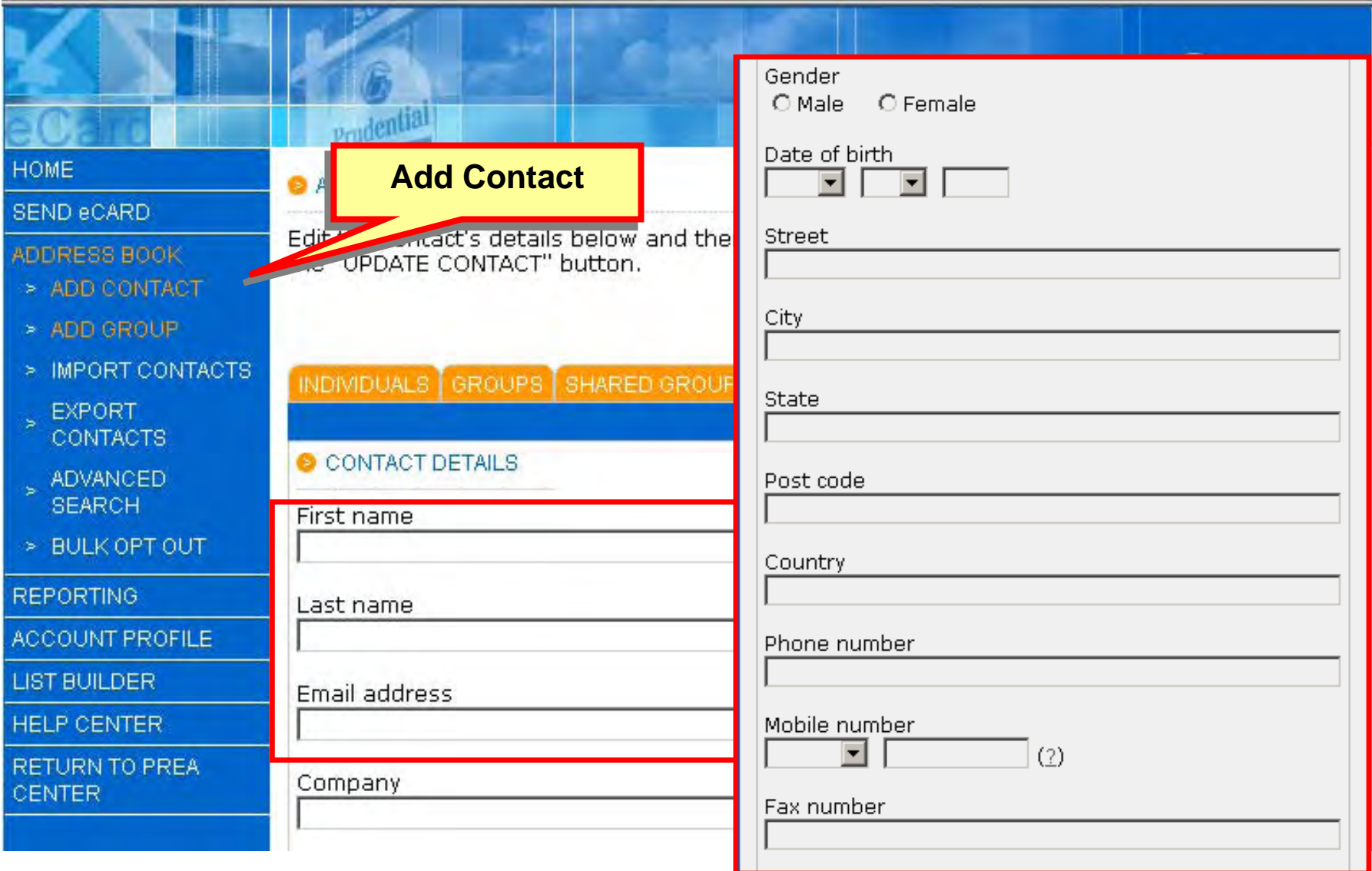
- > ADD CONTACT
- > ADD GROUP
- > IMPORT CONTACTS
- > EXPORT CONTACTS
- > ADVANCED SEARCH
- > BULK OPT OUT

INDIVIDUALS   GROUPS   SHARED GROUPS   DOMAINS

STATUS	FIRST NAME	LAST NAME	EMAIL ADDRESS	ACTIVITY
				EDIT
				EDIT
				EDIT
				EDIT
				EDIT

- REPORTING
- ACCOUNT PROFILE
- LIST BUILDER
- HELP CENTER

# Add Contact



**Add Contact**

HOME  
SEND eCARD  
ADDRESS BOOK  
    > ADD CONTACT  
    > ADD GROUP  
    > IMPORT CONTACTS  
    > EXPORT CONTACTS  
    > ADVANCED SEARCH  
    > BULK OPT OUT  
REPORTING  
ACCOUNT PROFILE  
LIST BUILDER  
HELP CENTER  
RETURN TO PREA CENTER

INDIVIDUALS   GROUPS   SHARED GROUP

CONTACT DETAILS

First name  
Last name  
Email address  
Company

Gender  
 Male    Female

Date of birth  
[ ] [ ] [ ]

Street  
City  
State  
Post code  
Country  
Phone number  
Mobile number [ ] [ ] (?)  
Fax number

# Address Book



**Import Contacts**

- HOME
- SEND eCARD
- ADDRESS BOOK
  - > ADD CONTACT
  - > ADD GROUP
  - > **IMPORT CONTACTS**
  - > EXPORT CONTACTS
  - > ADVANCED SEARCH
  - > CUSTOM FIELDS
  - > BULK OPT OUT
  - > SUPPRESSION LISTS
- REPORTING

ADDRESS BOOK > IMPORT CONTACTS

Contacts can be imported from a variety of applications or a spreadsheet file stored on your computer.

> **OUTLOOK**

 2000, XP and 2003

**START IMPORT**

> SALESFORCE.COM

 salesforce.com

**START IMPORT**

> OTHER FILE

 CSV and XLS (Microsoft Excel)

**START IMPORT**

# Address Book

## Import Contacts

- HOME
- SEND eCARD
- ADDRESS BOOK
  - > ADD CONTACT
  - > ADD GROUP
  - > **IMPORT CONTACTS**
  - > EXPORT CONTACTS
  - > ADVANCED SEARCH
  - > CUSTOM FIELDS
  - > BULK OPT OUT
  - > SUPPRESSION LISTS
- REPORTING

ADDRESS BOOK > IMPORT CONTACTS

Contacts can be imported from a variety of applications or a spreadsheet file stored on your computer.

### OUTLOOK



2000, XP and 2003

START IMPORT

### SALESFORCE.COM



salesforce.com

START IMPORT

### OTHER FILE



CSV and XLS  
(Microsoft Excel)

START IMPORT

> IMPORT CONTACTS FROM A SPREADSHEET FILE > HELP

Match the database and address book fields.

NEXT

	FIELD	STORE IN
1	First Name	First name
2	Last Name	Last name
3	Comments	
4	Company	
5	Address	
6	City	
7	State	
8	Zip/Postal	Don't store
9	Phone	Phone number
10	Fax	Fax number
11	e-mail address	Email address
12	Updated	Don't store
13		Don't store

om a  
(Microsoft Excel)  
er.

> IMPORT CONTACTS > STEP 5 OF 5: GROUP

Select an existing or create a new group to store the contacts in.

EXISTING GROUP

NEW GROUP

OR

- Agents
- Pru Blanton
- Prudential California

CCDS

• Other source

# Review

PRUDENTIAL  
University

## Lesson 1

**Access the eCard site and explore the eCard features**

- Access eCards on PREA Center**
- eCard Help Center**
- Account Profile**
- Adding Contacts**
- Importing your database**







# Getting the Most From eCards



2

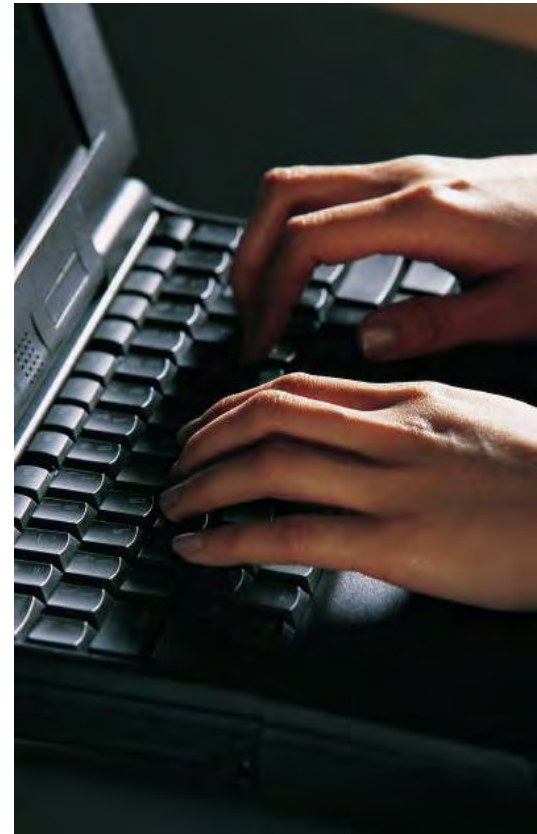
Lesson

- ❖ **Review steps in creating and sending an eCard**



# Creating an eCard

- 1. Configure Settings**
- 2. Select Recipients**
- 3. Add Files and Links**
- 4. Include Questions**
- 5. RSVP**
- 6. Add Content**
- 7. Preview and Send**



# Send an eCard

Begin by clicking here

SEND eCARD

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

RETURN TO PREA CENTER

Start a new eCard with the SEND eCARD button to the left.

Use the tabs below to browse between in progress, pending, scheduled and sent eCards.

Review reporting for all sent eCards with the REPORTING button to the left.

BLOCKED ECARDS?

Some Internet Service Providers or corporate email filters may block your email eCard.

To resolve this, contact the IT department or email administrator asking for the following details to be placed on the safe sender and/or white list:

Domain: tlcollect.com  
IP: 210.193.131.133

MORE FROM ECARDS

Get the most from eCards by viewing the online demo.

VIEW DEMO

RECENT UPDATES

- > [Recipient web tracking](#) - 29 Jun
- > [Multi-page reporting](#) - 29 Jun
- > [System settings](#) - 29 Jun
- > [Search shared groups](#) - 29 Jun
- > [Suppression Lists](#) - 10 May
- > [Sorting responses](#) - 10 May

MORE

GETTING STARTED

Just getting started? Go to the HELP CENTER for more information and instructions.

HELP CENTER

ECARDS

IN PROGRESS

PENDING APPROVAL

SCHEDULED

SENT

TYPE

TITLE

RECIPIENTS

URLS

QUESTIONS

FILES

CREATED

# Select a Template

NEW ECARDS

PROSPECTING

YAHOO!

ENOTES

PVRM<sup>SM</sup>

RECRUITING

HOLIDAYS

WINTER HOLIDAYS

SPORTS

SPECIAL OCCASIONS

BIRTHDAY

PATRIOTIC

GAY & LESBIAN

SPANISH LANGUAGE

AFRICAN AMERICAN

CHINESE

KOREAN

ERECIPE BOX

PROPERTY INFO FLYERS

COMMERCIAL

RETENTION

RELIGIOUS

ENEWSLETTERS

2006 SALES CONVENTION

FINE HOMES

RESORTS

NEW SALES PROFESSIONALS

PREA CORPORATE

CUSTOM

## TEMPLATES

QUESTIONS | RSVP

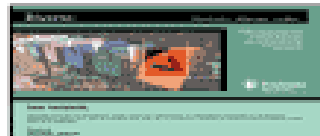


Smart

PREVIEW

USE

QUESTIONS | RSVP

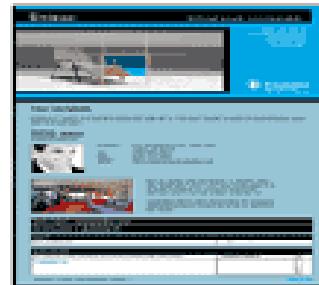


Diverse

PREVIEW

USE

QUESTIONS | RSVP



Unique

PREVIEW

USE

QUESTIONS | RSVP



Dependable

PREVIEW

USE

Preview the template with the "PREVIEW" button.

Select the template by clicking on the "USE" button



# eCard Templates

**Estamos realizando una casa abierta...  
...por favor pase a visitarnos.**

Prudential Real Estate

Prudential Real Estate eCards

**MESSAGE**  
This is sample text

Will you attend?  
Yes  No   
Number of guests:

**For Se**

- Elimin
- Accele
- Optim maxim
- Attrac
- Elimin of und
- Provid

**For Bl**

- Introd
- Elimin
- Allow
- Facilit

COM

A: 1  
T: C  
F: C  
M: C

# 1. Settings - Compulsory

- HOME
- SEND eCARD
- 1. SETTINGS
- 3. FILES AND LINKS
- 4. QUESTIONS
- 7. PREVIEW AND SEND
- ADDRESS BOOK
- REPORTING
- ACCOUNT PROFILE
- LIST BUILDER
- HELP CENTER
- RETURN TO PREA CENTER

1. Settings > 2. Recipients > 3. Files/Links > 4. Questions > 5. RSVP > 6. Content > 7. Preview/Send

Enter the basic details and optionally select a profile.

THE BASICS PROFILES

Your eCard title  
Just Listed - 125 Carisbrooke

This is for your records and Reporting.

Email subject  
A place to call home

Insert recipient details

- Insert recipient details
- Salutation
- First Name
- Last Name
- Email Address
- Company
- Gender
- Date of Birth
- Street
- City
- State

or  
Select an existing email subject

The recipients will see this in the

Send the eCard using the email address:  
 From the selected profile dohn.bower@prudential.com  
 From the system email address

Want to customise tlcollect.com? [More information...](#)

Forward all eCard replies to these email addresses

Optional. eCard replies are stored in Reporting. Separate email addresses with a semicolon (;)

**Forward replies to your inbox**

Enter an email address in which replies are forwarded to.

**Tip!**

Note that replies made with the recipient's email reader are forwarded. Replies made via the comments or feedback box are stored in the Reporting - Responses - Sorted Responses section.

eCard Title

eCard Subject

# 1. Settings - Compulsory

HOME

SEND eCARD

1. SETTINGS

2. RECIPIENTS

3. FILES AND LINKS

4. QUESTIONS

5. RSVP

6. CONTENT

7. PREVIEW AND SEND

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

RETURN TO PREA CENTER

1. Settings

2. Recipients

3. Files/Links

4. Questions

5. RSVP

6. Content

7. Preview/Send

Enter the basic details and optionally select a profile.

THE BASICS

PROFILES

Your eCard title

Just Listed - 125 Carisbrooke

This is for your records and Reporting.

Email subject

Insert recipient details

Forward replies to your inbox

Enter an email address in which replies are forwarded to

Tip!

Send the eCard using the email address:

From the selected profile agent24.7@mywebsite.com

From the system email address agent247@tcollect.com

Want to customise tcollect.com? [More information...](#)

Forward all eCard replies to these email addresses

agent24.7@mywebsite.com

Optional. eCard replies are stored in Reporting. Separate email addresses with a semicolon (;)

Forward all eCard replies to these email addresses

dohn.bower@prudential.com

Optional. eCard replies are stored in Reporting. Separate email addresses with a semicolon (;)

# 1. Settings - Sender Profile

- HOME
- SEND eCARD
  - 1. SETTINGS
  - 2. RECIPIENTS
  - 3. FILES AND LINKS
  - 4. QUESTIONS
  - 5. RSVP
  - 6. CONTENT
  - 7. PREVIEW AND SEND
- ADDRESS BOOK
- REPORTING
- ACCOUNT PROFILE
- LIST BUILDER
- HELP CENTER
- RETURN TO PREA CENTER

## 1. Settings

2. Recipients > 3. Files/Links > 4. Questions > 5. RSVP > 6. Content > 7. Preview/Send

Enter the basic details and select a profile. When complete, click **save & continue**.

THE BASICS **PROFILES**

Select the sender profile to send with the corresponding button.

SELECT	FIRST NAME	LAST NAME	EMAIL ADDRESS
<input type="radio"/>	Dohn	Bower	dohn.bower@prudential.com
<input checked="" type="radio"/>	Agent	24/7	agent24.7@mywebsite.com
<input type="radio"/>	Dohn Bower,	Prudential Real Estate Affiliates	dohn.bower@prudential.com

[ADD & EDIT SENDER PROFILES](#)

SAVE

SAVE & CONTINUE



# 2. Recipients

- HOME
- SEND eCARD
  - 1. SETTINGS
  - 2. RECIPIENTS
  - 3. FILES AND LINKS
  - 4. QUESTIONS
  - 5. RSVP
  - 6. CONTENT
  - 7. PREVIEW AND SEND

- 1. Settings
- 2. Recipients**
- 3. Files/Links
- 4. Questions
- 5. RSVP
- 6. Content
- 7. Preview/Send

Add a group of recipients to this eCard by clicking the appropriate tick box for the group name and then clicking the "ADD SELECTED GROUPS" button.

**Search for names**

To locate an individual recipient, click the "CONTACTS" tab and type the first or last name into the search box to the right.

SEARCH

Look for:

SEARCH

ADVANCED SEARCH

ADD CONTACT

Added recipients to this eCard are listed in the "CURRENT RECIPIENTS" tab.

ADDRESS BOOK

REPORTING

**Click to add names**

HELP CENTER

RETURN TO PREA CENTER

INDIVIDUALS					GROUPS					SHARED GROUPS					DOMAINS					CURRENT RECIPIENTS: 0				
STATUS	FIRST NAME	LAST NAME			EMAIL ADDRESS				ACTIVITY															
<input type="checkbox"/>									EDIT															
<input type="checkbox"/>									EDIT															
<input type="checkbox"/>									EDIT															
<input type="checkbox"/>									EDIT															

PAGES: FIRST << < 1 2 3 4 5 6 7 8 9 10 > >> LAST

FILTER LAST NAME BY: A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

CONTACTS: 1 - 20 OF 224

ADD SELECTED CONTACTS

SAVE & CONTINUE

# 3. Files and Links

Add files

3. Files/Links

file downloads or web links to the eCard.

FILES - UPLOADED LINKS

File location

C:\Data\My Documents\Prudential University\E-Cards\E Browse...

File display name (leave blank to use the file name)

Getting Started Guide

UPLOAD FILE

ADDED FILES - UPLOADED

DISPLAY NAME	SIZE
No files uploaded.	

SAVE & CONTINUE

## Prevent uploading large files

The majority of recipients do not have high speed internet connections. Reduce file size to improve these users chances of being able to download your attached files.

## INSTRUCTIONS

Add file downloads or web links to the eCard.

Files: Allows you to add files such as PDF or spreadsheets for the recipient to download.

To add a file, click the FILES tab and click the Browse button to locate the file on your PC. Optionally specify a display name for the file and click the ADD FILE button.

Links: Allows you to add a link such as your web site for the recipient to click and visit.

# 3. Files and Links

HOME

SEND eCARD

- 1. SETTINGS
- 2. RECIPIENTS
- 3. FILES AND LINKS
- 4. QUESTIONS
- 5. RSVP
- 6. CONTENT
- 7. PREVIEW AND SEND

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

RETURN TO PREA CENTER

Add links

3. Files/Links

Add file downloads or web links to the eCard.

FILES - UPLOADED LINKS

Link location (example: www.yourlink.com)

www.prea.prudential.com

Link display name

PREA Center

ADD LINK

ADDED LINKS

DISPLAY NAME	LOCATION
--------------	----------

No links added.

SAVE & CONTINUE



### Prevent uploading large files

The majority of recipients do not have high speed internet connections. Reduce file size to improve these users chances of being able to download your attached files.

### INSTRUCTIONS

Add file downloads or web links to the eCard.

Files: Allows you to add files such as PDF or spreadsheets for the recipient to download.

To add a file, click the FILES tab and click the Browse button to locate the file on your PC. Optionally specify a display name for the file and click the ADD FILE button.

Links: Allows you to add a link such as your web site for the recipient to click and visit.

# 4. Questions

- HOME
- SEND eCARD
  - 1. SETTINGS
  - 2. RECIPIENTS
  - 3. FILES AND LINKS
  - 4. QUESTIONS
  - 5. RSVP
  - 6. CONTENT
  - 7. PREVIEW AND SEND
- ADDRESS BOOK
- REPORTING
- ACCOUNT PROFILE
- LIST BUILDER
- HELP CENTER
- RETURN TO PREA CENTER

1. Settings > 2. Recipients > 3. Files > **4. Questions** > 5. RSVP > 6. Content > 7. Preview/Send

Add questions to the eCard.

**QUESTION INDEX** ADD QUESTION

Question text  
When are you considering moving?

Explanation  
Please select one of the following

Compulsory question (must be answered by recipient when responding)

QUESTION TYPE

Free text

Multiple choice

Answer 1  
1-6 months

Answer 2  
Within a year

Answer 3  
Within three years

Answer 4  
Not at all

**Insert question text and explanation**

**INSTRUCTIONS**

Questions give you the ability to ask the recipient(s) free text or multiple choice questions.

To add a questions, click the "ADD QUESTION" tab and then specify the question text and optionally an explanation.

answer to other questions or RSVP information, they will first be prompted to complete the compulsory question.

A question type must then be selected. If multiple choice is selected, you must type in at least one answer.

Click the "ADD QUESTION" button once complete. Questions already added to the eCard are listed in "QUESTION INDEX" tab.

The answers to the questions will be recorded in the "reporting" section for this

# 4. Questions

QUESTION INDEX		ADD QUESTION	
	QUESTION	TYPE	POSITION
<input type="checkbox"/>	<u>When are you considering moving?</u>	Multiple choice	<input type="button" value="DOWN"/>
<input type="checkbox"/>	<u>What areas would you be interested knowing about?</u>	Free text	<input type="button" value="UP"/>

- Free text or multiple choice questions
- Explanation
- Add more answers
- Randomize answers
- Rearrange question order
- Print Q&A Report

# 5. RSVP

- HOME
- SEND eCARD
  - 1. SETTINGS
  - 2. RECIPIENTS
  - 3. FILES AND LINKS
  - 4. QUESTIONS
  - 5. **RSVP**
  - 6. CONTENT
  - 7. PREVIEW AND SEND
- ADDRESS BOOK
- REPORTING
- ACCOUNT PROFILE
- LIST BUILDER
- HELP CENTER
- RETURN TO PREA CENTER

1. Settings | 2. Recipients | 3. Files/Links | 4. Questions | **5. RSVP** | 6. Content | 7. Preview/Send

Select Yes

Add and manage RSVP management for the eCard.

No

Yes

Allow recipient to bring guests

Maximum number of guests per recipient

[SESSION INDEX](#) [ADD SESSION](#)

DESCRIPTION	CAPACITY
No sessions added.	

SAVE

SAVE & CONTINUE

### INSTRUCTIONS

RSVP allows the management of events by asking recipients to answer whether they will attend or not. Multiple sessions and guests can be specified.

Add a session by clicking the "Yes" button, optionally select whether guests are allowed and a limit and then click on the "ADD SESSION" tab. Complete the details and click "ADD SESSION".

Sessions added to the eCard are listed in "SESSION INDEX" tab. Recipient RSVP information is stored in Reporting.

HIDE

# 5. RSVP

HOME

SEND eCARD

- 1. SETTINGS
- 2. RECIPIENTS
- 3. FILES AND LINKS
- 4. QUESTIONS
- 5. **RSVP**
- 6. CONTENT
- 7. PREVIEW AND SEND

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

RETURN TO PREA  
CENTER

- 1. Settings
- 2. Recipients
- 3. Files/Links
- 4. Questions
- 5. **RSVP**
- 6. Content
- 7. Preview/Send

Add and edit RSVP management for the eCard.

<input type="radio"/>	No
<input checked="" type="radio"/>	Yes
<input checked="" type="checkbox"/>	Allow recipient to bring guests
<input type="text" value="2"/>	Maximum number of guests per recipient
<b>SESSION INDEX</b> <b>ADD SESSION</b>	
Session description	
<input type="text" value="Open House - 125 Carrisbrooke"/>	
Capacity limit	
<input type="text" value="100"/>	
<b>ADD SESSION</b>	

**Add session information**

## INSTRUCTIONS

RSVP allows the management of events by asking recipients to answer whether they will attend or not. Multiple sessions and guests can be specified.

Add a session by clicking the "Yes" button, optionally select whether guests are allowed and a limit and then click on the "ADD SESSION" tab. Complete the details and click "ADD SESSION".

Sessions added to the eCard are listed in "SESSION INDEX" tab. Recipient RSVP information is stored in Reporting.

**HIDE**

**SAVE**

**SAVE & CONTINUE**

# 6. Content

- HOME
- SEND eCARD
- 1. SETTINGS
- 2. RECIPIENTS
- 3. FILES AND LINKS
- 4. QUESTIONS
- 5. RSVP
- 6. CONTENT
- 7. PREVIEW AND SEND
- ADDRESS BOOK
- REPORTING
- ACCOUNT PROFILE
- LIST BUILDER
- HELP CENTER
- RETURN TO PREA CENTER

- 1. Settings
- 2. Recipients
- 3. Files/Links
- 4. Questions
- 5.

## 6. Content

Enter the HTML content below. Refer to the right for instructions.

- HTML
- PRINT FRIENDLY
- PLAIN TEXT
- PERSONAL IMAGE

Select the area of the template to edit by clicking on the name or area.



Add content by clicking in the Message boxes

Click inside the image box to add a personal photo

### INSTRUCTIONS

#### HTML (COMPULSORY)

Content must now be added to the eCard with the HTML tab.

The HTML content is what the majority of recipients will view when they receive the eCard.

For further information on each of the editor's tool bar icons, click the help question mark icon.

#### PRINT FRIENDLY (OPTIONAL)

Optionally, print friendly content may also be added in the print friendly tab.

The print friendly content should be similar to the HTML content, however it should be formatted in such a manner where a desktop printer can print the eCard.

The print friendly feature is useful when a recipient is required to print the eCard.



# Message Editor

HTML

PRINT FRIENDLY

PLAIN TEXT

PERSONAL IMAGE

INACTIVITY LOGOUT IN: 15:32

> INDEX

> RESET

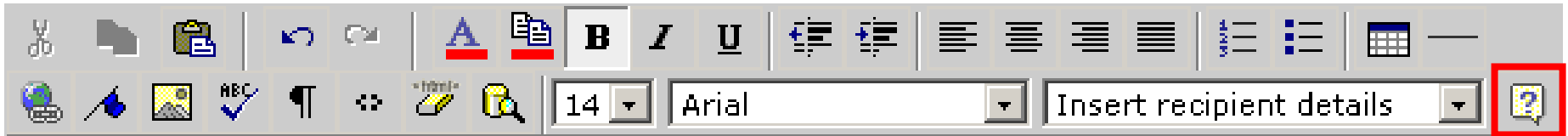
> SAVE



Customize the text as desired.

- Add bullets and numbering
- [Change the color](#)
- Change the font style and size
- Make it **BOLD**
- *Italicize* and underline
- **Change the color background**

# Message Editor



## HELP - MESSAGE EDITOR

### Spell Checking



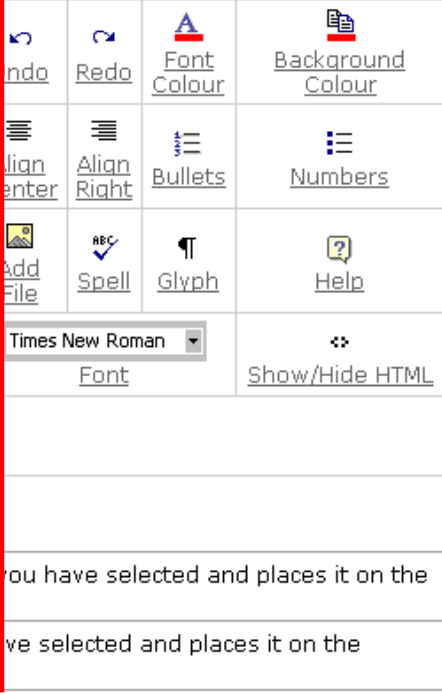
### Spell Checker


The spell checker is a very helpful tool providing similar functions to that of your conventional word processor. This checks your content text with a US Based English Dictionary and verifies to see if any spelling mistakes are made.

When the spell checking facility is activated you will be presented with a pop up screen, if a mistake is picked up it will be displayed in this window. Like other spell checkers it will provide a list of alternatives to the mistake found, you can either use the suggested changes or you can manually make a change yourself. Simply apply the change, if there are other mistakes within the content you will be notified and the same process as described continues.

You can cancel this process at anytime.

At this point in time the only dictionary supported is English (US).



 Paste: Pastes the contents of the clipboard into a new location

# Adding Personal Content

HTML

PRINT FRIENDLY

PLAIN TEXT

PERSONAL IMAGE

INACTIVITY LOGOUT IN: 18:12

INDEX

RESET

SAVE

Dear %!FIRSTNAME!%,

- Insert recipient details
- Insert recipient details
- Salutation
- First Name
- Last Name
- Email Address
- Company
- Gender
- Date of Birth
- Street
- City
- State

# 7. Preview and Send

## 7. Preview/Send

1. Settings > 2. Recipients > 3. Files/Links > 4. Questions > 5. RSVP > 6. Content > 7. Preview/Send

Displayed below is a preview of your eCard as the recipients will see it. Confirm all content and details before sending.

At the bottom of the page is the send report and options.

[HTML](#) [PRINT](#) [PLAIN TEXT](#) [DELIVERYSENSE](#) [SPAM REPORT](#)

FROM Wendy Owens [Wendy@tlcollect.com]

SUBJECT A place to call home

Dependable:

Capable, trustworthy, solid.

Just like your Prudential  
Real Estate sales  
professional.

Scroll up and down to  
view the eCard  
content and  
information



Prudential  
Real Estate  
the future of real estate. Now.

HOME

SEND eCARD

1. SETTINGS
2. RECIPIENTS
3. FILES AND LINKS
4. QUESTIONS
5. RSVP
6. CONTENT
7. **PREVIEW AND SEND**

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

RETURN TO PREA  
CENTER



# 7. Preview and Send

## A Place to Call Home!



Agent 24/7  
agent24.7@mywebsite.com  
Prudential Real Estate

A: 3333 Michelson Drive, Irvine CA 92612  
T: 555-333-1111  
W: <http://www.mywebsite.com>



View this special home. Custom features include:

- Custom moldings
- Granite countertops
- Upgraded appliances
- large private patio
- 2-car garage



# 7. Preview and Send

<b>WEB LINKS</b> » PREA Center	
<b>RSVP</b>	
Will you attend?	Yes <input type="radio"/> No <input type="radio"/> Number of guests: <input type="text"/>
<b>QUESTIONS</b>	
When are you considering moving?	<input type="text"/> Please select one of the following
What areas would you be interested knowing about?	<input type="text"/> Write your descriptions in the space provided.
<b>COMMENTS:</b>	<input type="text"/>
<b>SUBMIT YOUR RESPONSE HERE</b> »	
<b>SUBMIT</b>	

# 7. Preview and Send

## > PREFLIGHT REPORT

This eCard can now be sent as all of the required steps have been completed. You can now send this eCard now or send later below.

**Edit any previous step**

STEP	REQUIRED	COMPLETED	EDIT
Title and Subject	Yes	Yes	<a href="#">EDIT</a>
Recipients	Yes	Yes, 1 recipient(s)	<a href="#">EDIT</a>
Content	Yes	Yes	<a href="#">EDIT</a>
Files and Links	No	Yes, 1 file(s) 1 link(s)	<a href="#">EDIT</a>
Questions		Yes, 2 question(s)	<a href="#">EDIT</a>
RSVP		Yes, 1 session(s)	<a href="#">EDIT</a>

**Send later  
Select date and time**

## > SEND NOW

Click the button below to send this eCard now.

[SEND NOW](#)

**Send Now**

< Dec 2007 >

Su	Mo	Tu	We	Th	Fr	Sa
25	26	27	28	29	30	1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31	1	2	3	4	5

Today : 25 Feb 2007

## > SEND LATER

Select a date and time to send this eCard later.

On

At

[SEND LATER](#)

# eCard Sent Report

HOME

SEND eCARD

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

RETURN TO PREA  
CENTER

> ECARD SENT

The eCard has been sent.

> SEND ECARD

Create a new eCard.

SEND ECARD

> REPORTING

Review Reporting statistics.

REPORTING

> REPORTING NOTIFICATION

Review Reporting Notification.

REPORTING NOTIFICATION

> HOME PAGE

Go to the home page.

HOME





# Recipient View

**Dependable:**

Capable, trustworthy, solid.



Just like your Prudential  
Real Estate sales  
professional.



**Prudential**  
**Real Estate**  
the future of real estate. now.



# Recipient View

## A Place to Call Home!



Agent 24/7  
agent24.7@mywebsite.com  
Prudential Real Estate

A: 3333 Michelson Drive, Irvine CA 92612  
T: 555-333-1111  
W: <http://www.mywebsite.com>



View this special home. Custom features include:

- Custom moldings
- Granite countertops
- Upgraded appliances
- large private patio
- 2-car garage



# Recipient View



**WEB LINKS** » PREA Center

**DOWNLOADS** » Getting Started Guide.pdf - 340.63 kb

## RSVP

Will you attend?

Yes  No

Number of guests:

 ▼

## QUESTIONS

When are you considering moving?

 ▼

Please select one of the following

What areas would you be interested knowing about?

Write your descriptions in the space provided.

## COMMENTS:

**SUBMIT YOUR RESPONSE HERE** »

**SUBMIT**

To unsubscribe, check the box and click the unsubscribe button.

**UNSUBSCRIBE**



# Recipient View



**WEB LINKS** » PREA Center

**DOWNLOADS** » Getting Started Guide.pdf - 340.63 kb

## RSVP

Will you attend?

Yes  No

Number of guests:

## QUESTIONS

When are you considering moving?

Please select one of the following

What areas would you be interested knowing about?

Write your descriptions in the space provided.

## COMMENTS:

**SUBMIT YOUR RESPONSE HERE** »



**SUBMIT**

To unsubscribe, check the box and click the unsubscribe button.

**UNSUBSCRIBE**

## Lesson 2

### Review steps in creating and sending an eCard

1. **Configure Settings**
2. **Select Recipients**
3. **Add Files and Links**
4. **Include Questions**
5. **RSVP**
6. **Add Content**
7. **Preview and Send**





# Getting the Most From eCards



3

Lesson

- ❖ **Overview available reports and administrative functions within the Reporting Section**



# Reporting



- **Summary**
- **General**
- **Comments**
- **Locations**
- **Domains**
- **Opt Out**
- **Undeliverable**
- **RSVP**
- **Questions**
- **Files**
- **URL's**

# Reporting

REPORTING

HOME

SEND eCARD

ADDRESS BOOK

LIST BUILDER

HELP CENTER

RETURN TO PREA  
CENTER

## WELCOME

Start a new eCard with the SEND eCARD button to the left.

Use the tabs below to browse between in progress, pending, scheduled and sent eCards.

Review reporting for all sent eCards with the REPORTING button to the left.

## BLOCKED ECARDS?

Some Internet Service Providers or corporate email filters may block your email eCard.

To resolve this, contact the IT department or email administrator asking for the following details to be placed on the safe sender and/or white list:

Domain: tlcollect.com  
IP: 210.193.131.133

## MORE FROM ECARDS

Learn how to prospect and communicate with the Prudential Real Estate eCards interactive demo.

[VIEW DEMO](#)

## RECENT UPDATES

- > [Find contacts by letter](#) - 6 Mar
- > [Personalise print campaign](#) - 6 Mar
- > [Multi-page campaigns](#) - 6 Mar
- > [Content editing remodel](#) - 6 Mar
- > [Undeliverable Reporting](#) - 16 Nov
- > [Contact advanced search](#) - 16 Nov

[MORE](#)

## GETTING STARTED

Just getting started? Go to the HELP CENTER for more information and instructions.

[HELP CENTER](#)

## ECARDS

IN PROGRESS

PENDING APPROVAL

SCHEDULED

SENT

TYPE	TITLE	RECIPIENTS	URLS	QUESTIONS	FILES	CREATED
 EML	Just Listed - 125 Carisbrooke	2	0	0	0	29 Jan 06

[VIEW ALL IN PROGRESS ECARDS](#)

[CREATE NEW ECARD](#)



# Reporting

## FOLDERS


- eCards
  - CCDS / CDT
  - Education Team
  - Northern Training Contacts
  - Sphere of Influence
  - TEST

ADD FOLDER

## INSTRUCTIONS

Move the eCard: Click and drag the TYPE icon

**EML**, **SMS** or **PNT**

to folder icon .

**Select eCard to open complete report view.**

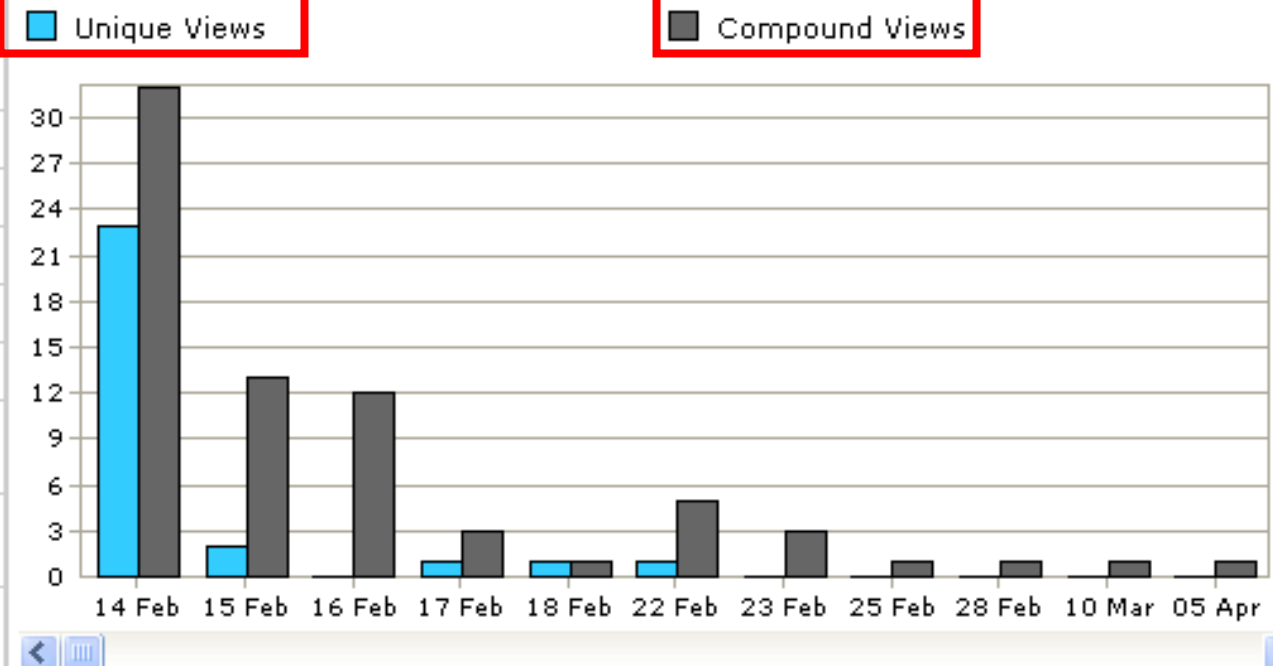
	TITLE	RECIPIENTS	UNIQUE VIEWS	VIEW %	UNDEL	OPT OUTS	SENT
	<a href="#">eCard course at The Exchange</a>	2	2	100%	0	0	7 Jan 06
	<a href="#">Action Pack Beta Test</a>	15	8	57%	1	0	31 Oct 05
	<a href="#">Week BluePrint</a>	35	28	82%	1	0	14 Feb 05
<b>EML</b>	<a href="#">BluePrint Report for week 2</a>	35	30	88%	1	1	7 Feb 05
<b>EML</b>	<a href="#">BluePrint Class Roster</a>	34	29	88%	1	0	27 Jan 05
<b>EML</b>	<a href="#">BluePrint Production Evaluation</a>	35	29	85%	1	0	27 Jan 05
	<a href="#">Just Listed in Carrisbrooke</a>	1	1	100%	0	0	19 Jan 05

# Reporting Summary

SUMMARY GENERAL COMMENTS LOCATIONS DOMAINS OPT OUTS UNDELIVERABLE RSVP Q & A FILES URLS

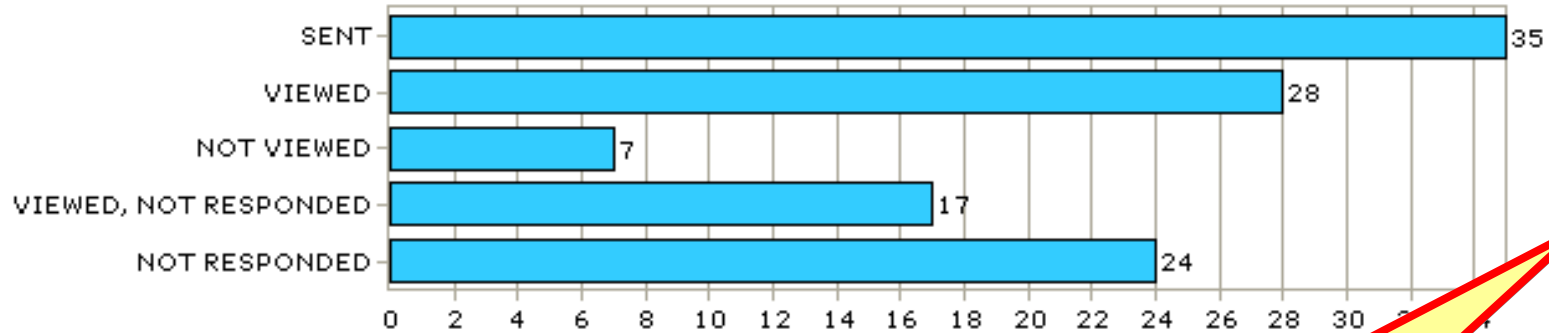
STATISTICS ACTIVITY SUMMARY: > DAILY > DAYS OF THE WEEK > HOURS OF THE DAY

Recipients	35
Unique views	28
Compound views	80
Responses	11
Undeliverable	1
Not viewed	7
Total views	108
View as a percentage	82.35%
Response rate of recipients	32.35%
Response rate of views	39.29%



# Reporting General

- SUMMARY
- GENERAL**
- COMMENTS
- LOCATIONS
- DOMAINS
- OPT OUTS
- UNDELIVERABLE
- RSVP
- Q & A
- FILES
- URLS



If [unclear] appear

**Report Toolbar**

## DETAILED REPORTING:

> SENT: 35 > VIEWED: 28 > NOT VIEWED: 7 > VIEWED, NOT RESPONDED: 17 > NOT RESPONDED: 24

A vertical toolbar on the right side of the page, enclosed in a red border. It contains several icons: a document icon, a bar chart icon, a document with a table icon, a document with a list icon, and a document with a grid icon. A yellow callout box with a red border and a red arrow points to the toolbar from the 'Report Toolbar' text.

# Reporting Comments

- SUMMARY
- GENERAL
- COMMENTS
- LOCATIONS
- DOMAINS
- OPT OUTS
- UNDELIVERABLE
- RSVP
- Q & A
- FILES
- URLS

VIEW: [SORTED COMMENTS](#) [UNSORTED RESPONSES](#)

Tip: View [Unsorted Responses](#) now for instant eCard responses and undeliverables.

FIRST NAME	LAST NAME	EMAIL	COMMENT	RECEIVED	ACTIVITY
------------	-----------	-------	---------	----------	----------

[COPY](#) [ARCHIVE](#) [VIEW](#) [DOWNLOAD IMAGE](#) [AUTOMATED TEMPLATE](#) [EXPORT REPORTS](#)

Export eCard reports to a spreadsheet format file.

REPORT	FIELDS					
Comments	<input checked="" type="checkbox"/>	First name	<input checked="" type="checkbox"/>	Last name	<input checked="" type="checkbox"/>	Email
	<input type="checkbox"/>	Salutation	<input type="checkbox"/>	Date of birth	<input type="checkbox"/>	Gender
	<input type="checkbox"/>	Company	<input type="checkbox"/>	Street	<input type="checkbox"/>	City
	<input type="checkbox"/>	State	<input type="checkbox"/>	Post code	<input type="checkbox"/>	Country
	<input type="checkbox"/>	Phone	<input type="checkbox"/>	Mobile	<input type="checkbox"/>	Fax

[EXPORT](#)

14:05			
22:46			
22:18			
22:01			
16:38			

new ones, or they will miss

# Reporting Locations

- SUMMARY
- GENERAL
- COMMENTS
- LOCATIONS**
- DOMAINS
- OPT OUTS
- UNDELIVERABLE
- RSVP
- Q & A
- FILES
- URLS



# Reporting Domains

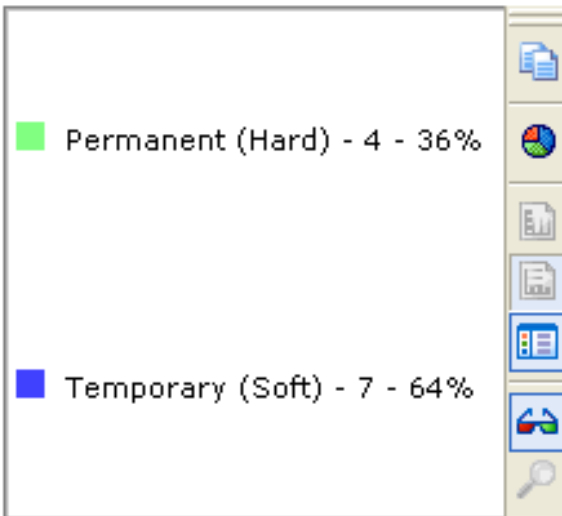
SUMMARY	GENERAL	COMMENTS	LOCATIONS	DOMAINS	OPT OUTS	UNDELIVERABLE	RSVP	Q & A	FILES	URLS
DOMAIN	RECIPIENTS	U. VIEWS	U. VIEW %	RESPONSES	UNDELIVERABLE	UNDEL. %	OPT OUTS			
pruoc.com	9	9	100%	3	0	0%	0			
cox.net	8	7	87.5%	5	0	0%	0			
prusocal.com	4	4	100%	1	0	0%	0			
yahoo.com	2	2	100%	0	0	0%	0			
prudential.com	2	2	100%	1	0	0%	0			
aol.com	2	0	0%	0	0	0%	0			
earthlink.net	2	1	50%	0	0	0%	0			
hotmail.com	1	0	0%	0	0	0%	0			
mermeenzahran.com	1	0	0%	0	1	100%	0			
msn.com	1	1	100%	1	0	0%	0			
ocvillas.com	1	1	100%	0	0	0%	0			
closer2reality.com	1	0	0%	0	0	0%	0			
dennisvalentine.com	1	1	100%	0	0	0%	0			
<b>TOTAL: 13</b>	<b>35</b>	<b>28</b>	<b>82.35%</b>	<b>11</b>	<b>1</b>	<b>2.86%</b>	<b>0</b>			



# Reporting Undeliverable

SUMMARY GENERAL COMMENTS LOCATIONS DOMAINS OPT OUTS UNDELIVERABLE RSVP Q & A FILES URLS

VIEW: > UNDELIVERABLE GRAPHS > UNDELIVERABLE RECIPIENTS



STATISTICS		
Permanent (hard)	4	36%
Temporary (soft)	7	64%
<b>TOTAL</b>	<b>11</b>	<b>100%</b>

If the above graph does not appear [click here](#).

# Reporting Q & A

SUMMARY GENERAL COMMENTS LOCATIONS DOMAINS OPT OUTS UNDELIVERABLE RSVP Q & A FILES URLS

Below is a summary of the responses to the multiple choice questions in this eCard.

[▶ VIEW ALL QUESTIONS BY RECIPIENT](#)

[▶ QUESTION SUMMARY:](#)

[▶ PRINT GRAPHS](#)

## 1. WHAT SECTION OF BLUEPRINT HELPED YOU THE MOST



ANSWER	COUNT	%
Working with Sellers	1	6.25%
Objections and Negotiations	5	31.25%
Working With Buyers	1	6.25%
Prospecting and Lead Generation	9	56.25%
<b>TOTAL</b>	<b>16</b>	<b>100%</b>

To view the interactive graph [click here](#) (requires ActiveX).





# Other eCard Reports



- **Opt Out**
- **RSVP**
- **Files**
- **URL's**

# Reporting Comparative

HOME

SEND eCARD

ADDRESS BOOK

REPORTING

> eCARDS

> IN PROGRESS

**COMPARATIVE**

> NOTIFICATION

> PLANNING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

RETURN TO PREA  
CENTER

> REPORTING > COMPARATIVE

EMAIL METRICS	YOU	SYSTEM AVERAGE
Average recipients per eCard	47	274
Unique view rate	46.61%	39.45%
Response rate	3.7%	1.45%
Response rate of viewers	7.94%	3.68%
Unsubscribe rate	0.47%	0.35%
Undeliverable rate	6.55%	10.06%

# Reporting Notification

HOME

SEND eCARD

ADDRESS BOOK

REPORTING

> eCARDS

> IN PROGRESS

> COMBINED

> COMPARATIVE

NOTIFICATION

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

RETURN TO PREA  
CENTER

> REPORTING > NOTIFICATION

> SELECT USAGE

Do you want to receive Reporting Notification?

Disabled

> SUBMIT

Enabled

> 1. FREQUENCY

How often should the Reporting Notification email be sent?

Every  day(s)

> 2. START AGE

When should the first Reporting Notification email be sent?

After the eCard is  day(s) old.

> 3. END AGE

When should the last Reporting Notification email be sent?

Until the eCard is  day(s) old.

> INSTRUCTIONS

Reporting Notification helps you keep track of sent eCard activity with regular email updates.

In some cases, eCards may not be viewed by recipients until sometime after the eCard is sent. As such, any reporting information such as question answers, comments and RSVP may be missed by the sender.

The usage options are as follows:

1. Frequency: How often the Reporting Notification email will be sent in a measurement of days. If there is no eCard activity, a Reporting Notification email will not be sent.
2. Start age: When the first Reporting Notification email will be sent after a eCard is sent. As the bulk of eCard activity occurs during the first day, this should be set to at least 1 day.
3. End age: When the last Reporting Notification email will be sent after a eCard is sent. Leave this blank to receive Reporting Notification

# Reporting Planning

## > REPORTING > PLANNING

Share notes and schedule eCards with your colleagues. Select a date to begin.

SELECT DATE

← October 2007	November 2007	December 2007 →
S M T W T F S	S M T W T F S	S M T W T F S
30 1 2 3 4 5 6	28 29 30 31 1 2 3	1
7 8 9 10 11 12 13	4 5 6 7 8 9 10	2 3 4 5 6 7 8
14 15 16 17 18 19 20	11 12 13 14 15 16 17	9 10 11 12 13 14 15
21 22 23 24 25 26 27	18 19 20 21 22 23 24	16 17 18 19 20 21 22
28 29 30 31	25 26 27 28 29 30	23 24 25 26 27 28 29
		30 31 1 2 3 4 5

## > INSTRUCTIONS

Use the Reporting Planning tool to share notes and schedule eCard and share notes with your colleagues.

Click a date to view notes. Use the left and right arrows to scroll backwards or forwards through months.

To add a new note, complete the Title and Description fields and click the ADD button.

All users of your company have access to these notes.

HIDE

> DATE: 28 Dec 2007

### ADD NEW PLANNING NOTE

Title

Happy New Year

Description

Send a Happy New Year eCard to all contacts in my database

CANCEL

ADD

# Administrative Tools

- HOME
- SEND eCARD
- ADDRESS BOOK
- REPORTING
  - > eCARDS
  - > IN PROGRESS
  - > COMBINED
  - > COMPARATIVE
  - > NOTIFICATION
  - > PLANNING
  - > WEB TRACKING

- ACCOUNT PROFILE
- LIST BUILDER
- HELP CENTER
- RETURN TO PREA CENTER

REPORTING > ECARDS

Click the eCard title for further detail. Use the tabs to filter between the different types of eCards.

ALL EMAIL TEMPLATES

FOLDERS	TYPE	TITLE	RECIP.	VIEW						
eCards	EML	Marie's	1	0	0%	0	0	06		
								29 Nov 06		
								13 Oct 06		
								16 Aug 06		
								12 Mar 06		
								31 Oct 05		
								14 Feb 05		

AD

Microsoft Internet Explorer

The eCard has been copied into the in progress table. Would you like to edit the copied eCard now?

OK Cancel

Move the eCard: Click and drag the TYPE icon or to folder icon .

Click Copy Icon



# Administrative Tools



- HOME
- SEND eCARD
- ADDRESS BOOK
- REPORTING
  - > eCARDS
  - > IN PROGRESS
  - > COMBINED
  - > COMPARATIVE
  - > NOTIFICATION
  - > PLANNING
  - > WEB TRACKING
- ACCOUNT PROFILE
- LIST BUILDER
- HELP CENTER
- RETURN TO PREA CENTER

> REPORTING > ECARDS

Click the eCard title for further detail. Use the tabs to filter between the different types of eCards.

ALL EMAIL TEMPLATES

FOLD	TITLE	RECIP.	VIEWS	VIEW %	UNDEL	OPT.	SENT	
Folder icon	Prospecting - Oct 12, 2006	2	1	50%	0	0	13 Oct 06	
Folder icon	Just Listed - 125 Carisbrooke	1	0	0%	0	0	16 Aug 06	
	Just Listed - 125 Carisbrooke	1	1	100%	0	0	12 Mar 06	
	Action Pack Beta Test	15	8	57%	1	0	31 Oct 05	
	Week BluePrint	35	28	82%	1	0	14 Feb 05	
	BluePrint Report for week 2	35	30	88%	1	1	7 Feb 05	
	BluePrint Class Roster	34	29	88%	1	0	27 Jan 05	

Click on the selected eCard to open

ADD FOLDER

> INSTRUCTIONS

Move the eCard: Click and drag the TYPE icon or to folder icon .

# Administrative Tools



Copy

TOOLS



REPORTING DETAIL: ACTION PACK BETA TEST (5:03AM)

Select tabs to view reports. Tools are available.

SUMMARY GENERAL RESPONSES DELIVERABILITY LOCATIONS RSVP Q & A FILES URLS PAGES

RECIPIENTS ACTIVITY SUMMARY: DAILY DAYS OF THE WEEK HOURS OF THE DAY

Sent 15

## COPY AS IN PROGRESS CAMPAIGN

Copy the eCard settings and content as an in progress eCard. The eCard can be further edited and sent.

COPY

## COPY AS IN PROGRESS CAMPAIGN TO ANOTHER USER

Copy the eCard settings and content as an in progress eCard to another user account.

Copy to

COPY

CLOSE

DELIVERY	
Undeliverable	1
Delivery Rate	93.33%
Suppressions	0
Send Progress	100%

If the above graph does not appear [click here](#).

REPORTING SUMMARY

TOP

HOME

SEND eCARD

ADDRESS BOOK

REPORTING

> eCARDS

> IN PROGRESS

> COMBINED

> COMPARATIVE

> NOTIFICATION

> PLANNING

> WEB TRACKING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

RETURN TO PREA CENTER

# Administrative Tools

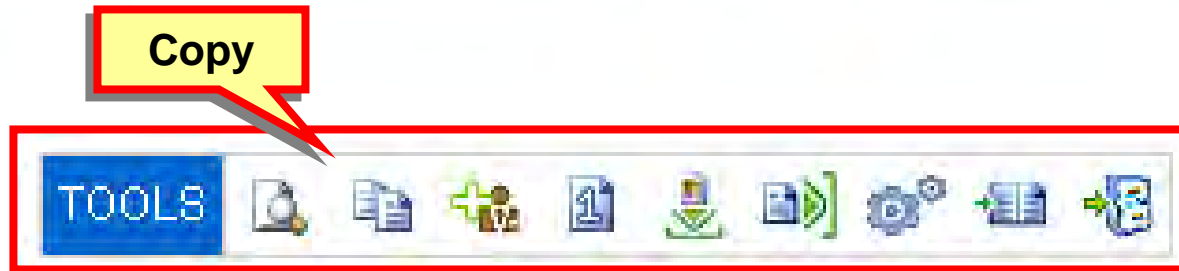
View



- **View** will open the eCard so you can remember what you sent before continuing with administrative functions.



# Administrative Tools



<p>&gt; COPY AS IN PROGRESS CAMPAIGN</p> <p>Copy the eCard settings and content as an in progress eCard. The eCard can be further edited and sent.</p> <p><b>COPY</b></p>	<p>&gt; COPY AS IN PROGRESS CAMPAIGN TO ANOTHER USER</p> <p>Copy the eCard settings and content as an in progress eCard to another user account.</p> <p>Copy to <input type="text"/></p> <p><b>COPY</b></p>
<p><b>CLOSE</b></p>	

- **Copy** allows users to copy sent eCards to themselves and others within their office to be used over and over.

# Administrative Tools

Add Additional  
Recipients



http://prudential.truelogic.com.au - Prudential Real Estate eCards - Additional Recipients - ...

ADDRESS BOOK SEARCH

Add additional recipients to the already sent eCard. The selected recipients are automatically sent the eCard.  SEARCH or ADVANCED

All contacts are listed.

CONTACTS GROUPS SHARED GROUPS DOMAINS

ADDITIONAL RECIPIENTS (AWAITING SEND): 0

STATUS	FIRST NAME	LAST NAME	EMAIL ADDRESS	COMPANY
<input type="checkbox"/>	Pamela	Adams	<a href="mailto:pamelaadams@prusocal.com">pamelaadams@prusocal.com</a>	Prudential California
<input type="checkbox"/>	Bob	Allen	<a href="mailto:bob@publan.com">bob@publan.com</a>	
<input type="checkbox"/>	Mary	Alsop	<a href="mailto:malsop@cdaniovner.com">malsop@cdaniovner.com</a>	
<input type="checkbox"/>	Terry	Amstuz	<a href="mailto:dlamstuz@yahoo.com">dlamstuz@yahoo.com</a>	
<input type="checkbox"/>	Jacqueline	Austin	<a href="mailto:jacgaustin@prucrew.com">jacgaustin@prucrew.com</a>	Premier Properties
<input type="checkbox"/>	Mary Ann	Ayers	<a href="mailto:mayers@cdaniovner.com">mayers@cdaniovner.com</a>	
<input type="checkbox"/>	Brenda	Bacheller	<a href="mailto:bbacheller@cdaniovner.com">bbacheller@cdaniovner.com</a>	
<input type="checkbox"/>	Roberta	Bangs	<a href="mailto:roberta.bangs@prudentialrand.com">roberta.bangs@prudentialrand.com</a>	Rand Realty
<input type="checkbox"/>	Roberta	Bangs	<a href="mailto:rfbangs@aol.com">rfbangs@aol.com</a>	Rand Realty
<input type="checkbox"/>	Brian	Bayne	<a href="mailto:bbayne@charter.net">bbayne@charter.net</a>	

Done Internet

- **Add Additional Recipients** will allow you to add additional recipients to the eCard and send it again automatically.

# Administrative Tools

## One Page Report



### ONE PAGE REPORT: JUST LISTED - 125 CARISBROOKE (SENT: 16 AUG 06 @ 5:18PM)

Select the desired reports to combine to one report. The one page report can then be printed or downloaded as a PDF.

- All graphs and reports   or    Activity Summary: Daily  
 Activity Summary: Days of the week  
 Activity Summary: Hours of the day  
 General Summary  
 Location of viewers  
 RSVP Summary  
 Question Summarys  
 Downloads by File  
 Clicks by Url  
 Pages Summary

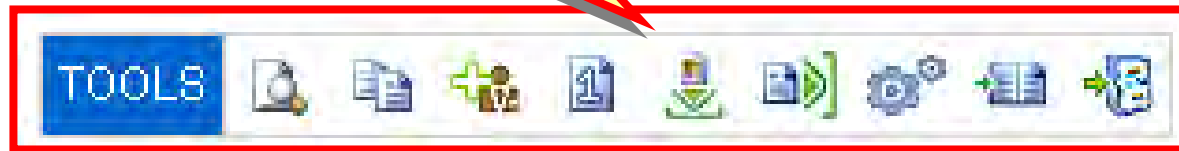
VIEW REPORT

CLOSE

- **One Page report** allows you to select the desired reports to combine to one report. The one page report can then be printed or downloaded as a PDF.

# Administrative Tools

Download



## > DOWNLOAD IN PDF FORMAT

Download the eCard as viewed by the recipients in a single PDF.

PDF is suitable for printing and is a larger file size.

DOWNLOAD PDF

## > DOWNLOAD IN JPEG FORMAT

Download the eCard as viewed by the recipients in a single JPEG image.

JPEG is suitable for web viewing and is a smaller file size.

DOWNLOAD JPEG

## > DOWNLOAD IN PNG FORMAT

Download the eCard as viewed by the recipients in a single PNG image.

PNG is suitable for printing and is a higher file size.

DOWNLOAD PNG

CLOSE

- **Download** - will allow you to download the eCard as a pdf file, JPG image or single PNG file for high resolution printing.

# Administrative Tools

## Export Reports



**EXPORT TO SPREADSHEET**

Export eCard reports to a spreadsheet format file.

REPORT	FIELDS		
	<input type="checkbox"/> First name	<input type="checkbox"/> Last name	<input type="checkbox"/> Email
	<input type="checkbox"/> Salutation	<input type="checkbox"/> Date of birth	<input type="checkbox"/> Gender
	<input type="checkbox"/> Company	<input type="checkbox"/> Street	<input type="checkbox"/> City
	<input type="checkbox"/> State	<input type="checkbox"/> Zip Code	<input type="checkbox"/> Country
	<input type="checkbox"/> Phone	<input type="checkbox"/> Mobile	<input type="checkbox"/> Fax

**EXPORT** **CLOSE**

- **Export Reports** allows you to export any report information into a spreadsheet format.

# Administrative Tools



- **Automate** a template to be used in an auto-response when someone registers on your website with List Builder.

# Administrative Tools

Journal



http://prudential.truelogic.com.au - Reporting > Journal: MCC - F...

ECARD JOURNAL: **EM** MCC - FEB-2007

Keep track of key eCard events and dates.

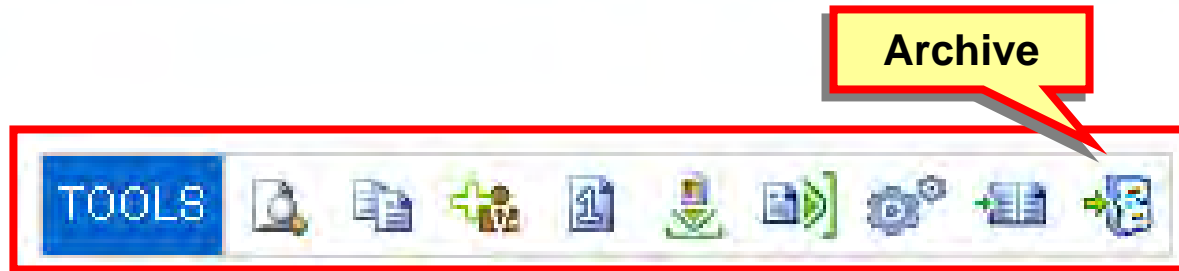
NOTE	USER	DATE
eCard created (copied from MCC - Feb-2007)	Dohn Bower	27 Jan 07 @ 9:38AM
eCard sent	Dohn Bower	2 Feb 07 @ 10:58AM

[CLOSE](#)

Done Internet

- The **Journal** icon allows you to track important eCard events and dates.

# Administrative Tools



- **Archive** stores all sent eCards in a separate folder. Templates will not be available to edit, copy or track usage.



## Lesson 3

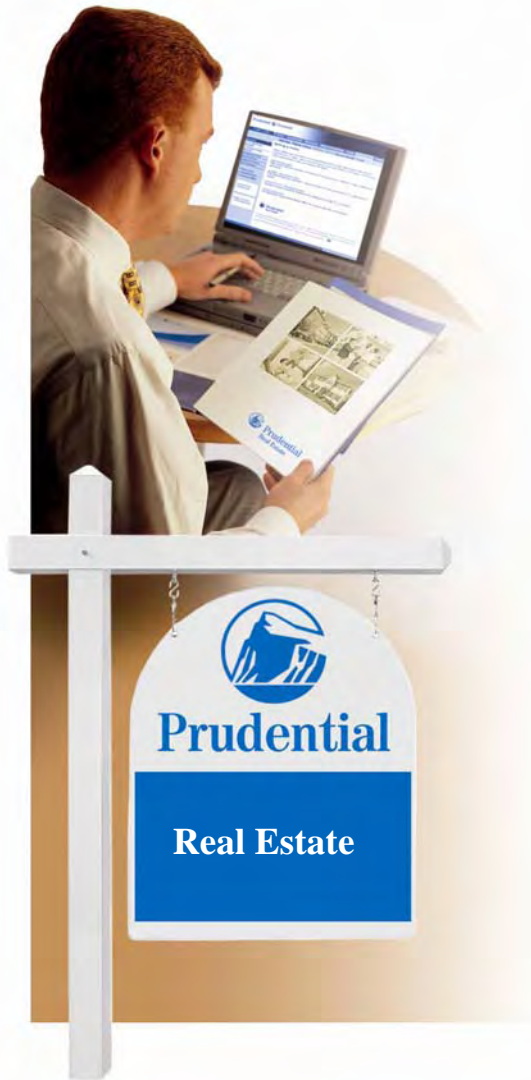
### Overview available reports and administrative functions within the Reporting Section

- ☑ Process and collect information
- ☑ Determine effectiveness
- ☑ Manage information easier





# eCard Tips



- **Start simple**
- **Apply additional features later**
- **Send practice eCards**
- **Use the system regularly**
- **Review frequent updates often**



# Taking it home ...

**PRUDENTIAL**  
University

## Action Items next 30 days:

- 1. Access eCard site and set up your Account Profile**
- 2. Import your database of recipients**
- 3. Send an eCard with a copy to your branch manager or coach**

