Getting the Most From eCards

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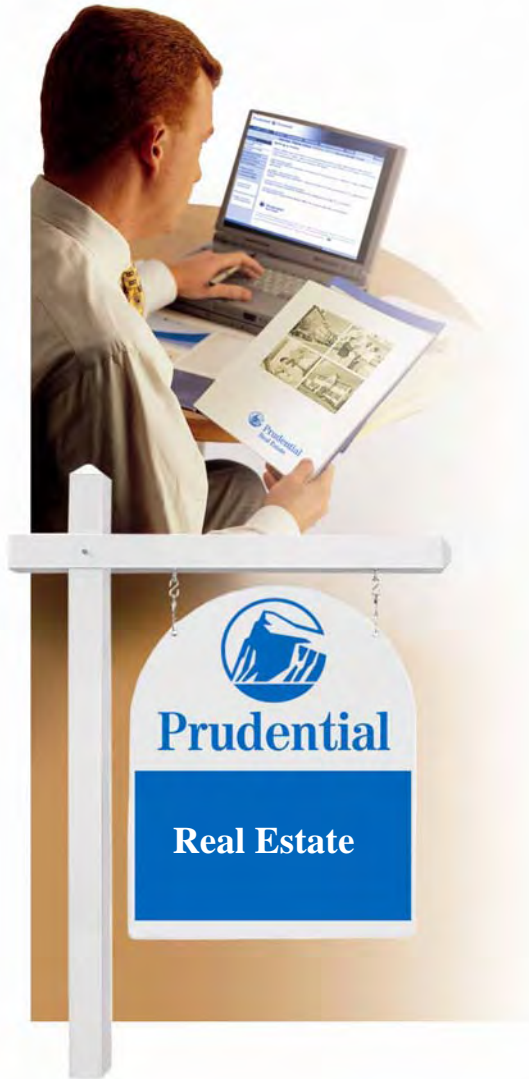
- **Exclusive to Prudential Real Estate**
- **Accessible online at PREA Center**
- **Easy to customize**
- **More options than ever before**
- **Over 200 templates**
- **Reporting options**
- **Available to all sales professionals**

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**
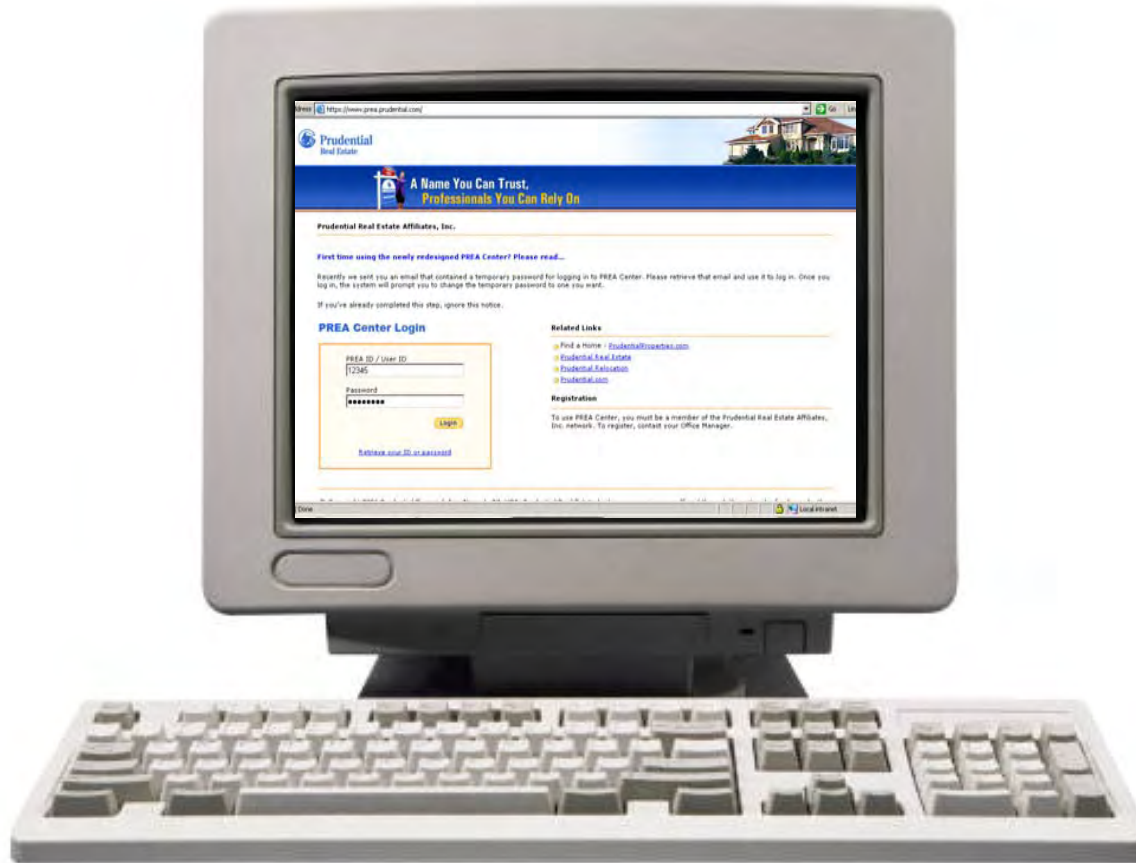
Getting the Most From eCards

1

Lesson

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

PREA Center

www.prea.prudential.com

PREA Center

Prudential Real Estate

**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 tem... Center. Please retrieve that email and use it to log in. Once you log in, the system will prompt you to change the te...

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

Enter your Login ID and Password

PREA Center Login

PREA ID / User ID

12345

Password

•••••••

Login

Retrieve your ID or password

Related Links

- Find a Home - 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
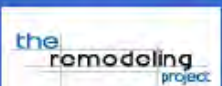
Once logged in, follow the Quick Link to the eCards section.

Accessing the eCard Site

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.

⊘ 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

Recent Updates

Additional Updates

- Send Test

- Web Tracking

- Campaign Reporting Notification

- Yahoo! Maps

- Combined Campaign Reporting

eCard Table

eCards Table

	IN PROGRESS	PENDING APPROVAL	SCHEDULED	SENT			
TYPE	TITLE		RECIPIENTS	URLS	QUESTIONS	FILES	CREATED
EML	Just Listed - 125Carrisbrooke		1	0	2	0	27 Jan 06
EML	Just Listed in Carrisbrooke		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**

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> **RECENT UPDATES**

> Recipient web tracking - 29 Jun
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> Sorting responses - 10 May

MORE

> **GETTING STARTED**

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HELP CENTER

> **ECARDS**

IN PROGRESS	PENDING APPROVAL	SCHEDULED	SENT

TYPE	TITLE	RECIPIENTS	URLS	QUESTIONS	FILES	CREATED

Getting Started

Help Center

HELP CENTER

Download the "eCards Getting Started Guide"

Submit New Query

Help Center - Submit Query

Help Center - Submit Query

Help Center - Submit Query

PRUDENTIAL *University*

Prudential Real Estate

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:

OTHER CATEGORIES

Select another article category:

Account Profile - General

LIST CATEGORY ARTICLES

System opens the question

And gives the solution

Help Center - Knowledge Base

Select from all articles

Search for keywords

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
Account Profile - General	6
Account Profile - Managing Users	3
Account Profile - Upload Image	1
Address Book - Exporting	1
Address Book - General	17
Address Book - Importing	12
Address Book - Searching	2
SEND eCARD - Confirm and Send	6
SEND eCARD - Content	7
SEND eCARD - Files and Links	1
SEND eCARD - Questions	1
SEND eCARD - Recipients	1

KEYWORD SEARCH

Search for keywords:

SEARCH

Help Center - Knowledge Base

Help Center - Knowledge Base

PRUDENTIAL University

Prudential Real Estate

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:

OTHER CATEGORIES

Select another article category:

Account Profile - General ▼

CATEGORY ARTICLES

System opens the question

And gives the solution

Tutorials

HELP CENTER > TUTORIALS

To read the tutorial click on the title.

Navigation menu:
- HOME
- SEND eCARD
- ADDRESS BOOK
- REPORTING
- ACCOUNT PROFILE
- LIST BUILDER
- HELP CENTER
  - > SUBMIT QUERY
  - > REVIEW QUERIES
- **TUTORIALS**
- RETURN TO PREA CENTER

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

Tutorials

Account Profile

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: agent24.7@mywebsite.com Company: Prudential Real Estate Address: 3333 Michelson Drive Irvine CA 92612 Telephone: 555-333-1111 Web: http://www.mywebsite.com	EDIT ADD PHOTO DEL PHOTO
	Dohn Bower, Pruden Real Estate Affiliate	Email: Address: 3333, n Drive, Suite 1000 Irvine 2 USA Telephone: 949-794-1 Web: http://www.prea.prudential.co	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.
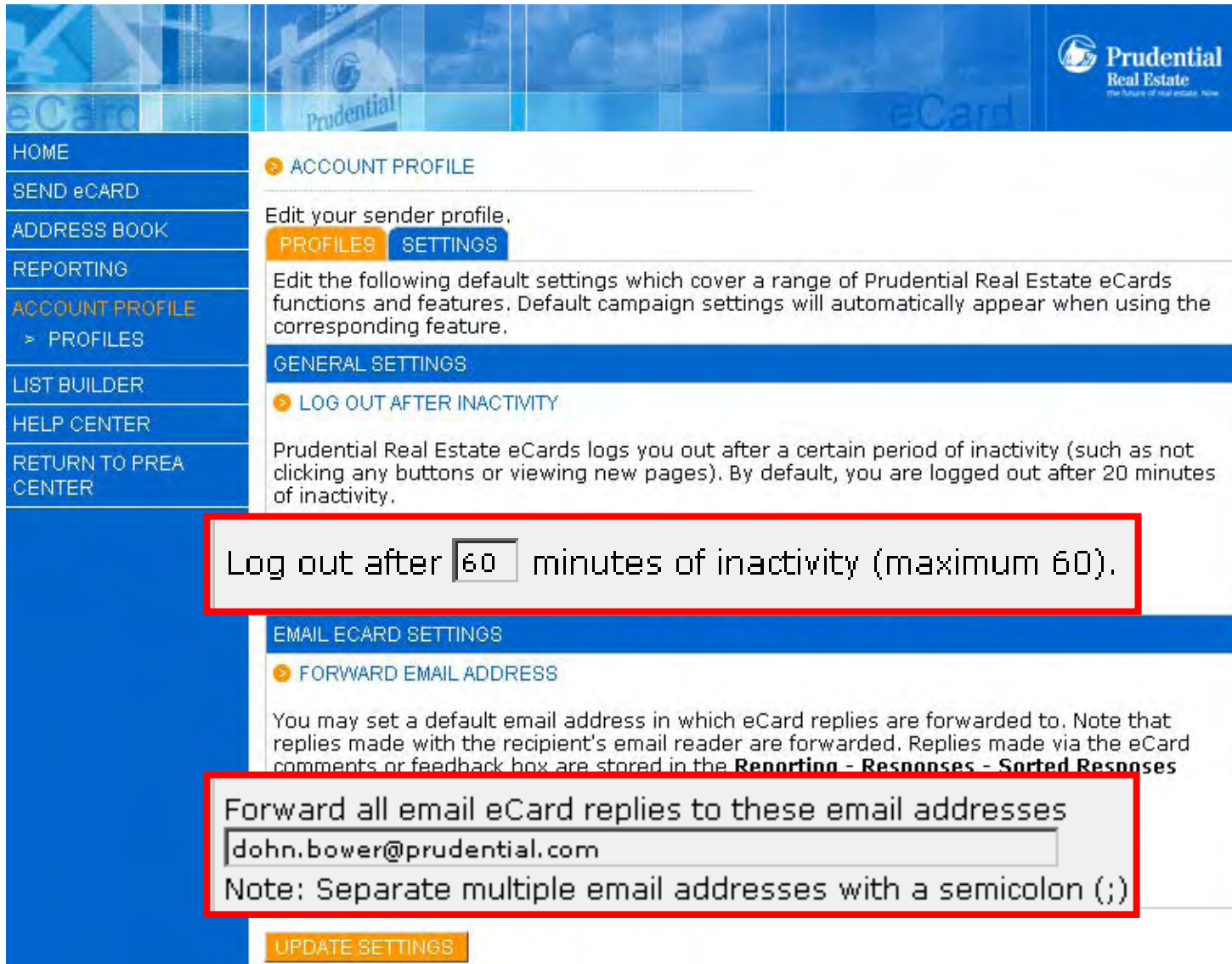
Optionally, the eCard can be sent using an alternate sender profile. For example, if the default sender profile is listed as "John Citizen", a sender profile can be setup to send eCards using the name "Mary Citizen".

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

Address Book

ADDRESS BOOK

HOME

ADDRESS BOOK

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

REPORTING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

ADDRESS BOOK

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

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

| INDIVIDUALS | GROUPS | SHARED GROUPS | DOMAINS |

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

SEARCH

Look for

SEARCH

ADVANCED SEARCH

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

FILTER 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

Add Contact

Add Contact

Address Book

Address Book

Import Contacts

> IMPORT CONTACTS FROM A SPREADSHEET FILE   > HELP

om a
(Microsoft Excel)
er.

NEXT

Match the database and address book fields.

	FIELD	STORE IN
1	First Name	First name
2	Last Name	
3	Coments	
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

> IMPORT CONTACTS > STEP 5 OF 5: GROUP

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

EXISTING GROUP	OR	NEW GROUP
		CCDS

Agents
Pru Blanton
Prudential California

• Other source

Review

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**
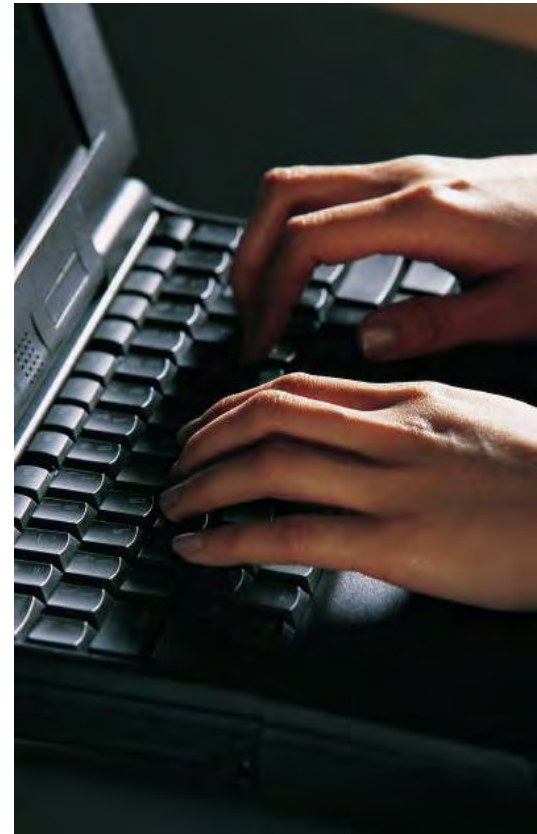
Send an eCard

SEND eCARD

Begin by clicking here

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.

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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℠ | 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
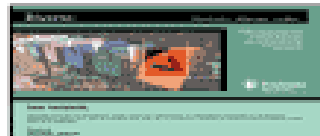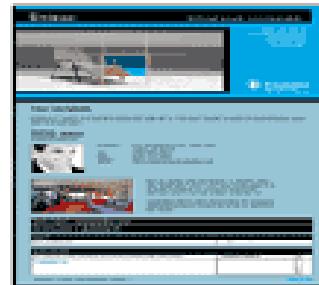
QUESTIONS | RSVP	QUESTIONS | RSVP	QUESTIONS | RSVP	QUESTIONS | RSVP
Smart	Diverse	Unique	Dependable
PREVIEW USE	PREVIEW USE	PREVIEW USE	PREVIEW USE

Preview the template with the "PREVIEW" button.

Select the template by clicking on the "USE" button

eCard Templates

1. Settings - Compulsory

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

eCard Title

3. FILES AND L...

4. QUESTIONS

eCard Subject

7. PREVIEW AND SEND

ADDRESS BOOK

REPORTING

ACCOUNT PROFILE

LIST BUILDER

HELP CENTER

RETURN TO PREA CENTER

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...

⊙ **Forward replies to your inbox**

Enter an email address in which ...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 Resposes section.

Send the eCard using the email address:
⦿ From the selected profile dohn.bower@prudential.com
○ From the system email address [   ] Dohn @tlcollect.com
Want to customise tlcollect.com? More information...

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 - 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

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] @tlcollect.com
Want to customise tlcollect.com? More information...

Forward all eCard replies to these email addresses

agent24.7@mywebsite.com

Optional. eCard replies are stored in Reporting. Separate email addre... (;)

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

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
○	Dohn	Bower	dohn.bower@prudential.com
◉	Agent	24/7	agent24.7@mywebsite.com
○	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

ADDRESS BOOK

REPORTING

HELP CENTER

RETURN TO PREA CENTER

Add a group of recipients to this eC... appropriate tick box for the group n... "ADD SELECTED GROUPS" button.

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

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

Search for names

Click to add names

> SEARCH

Look for:

SEARCH

ADVANCED SEARCH

ADD CONTACT

INDIVIDUALS	GROUPS	SHARED GROUPS	DOMAINS	CURRENT RECIPIENTS: 0

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

HO

SE

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 files

...ttings 2. Recip... **3. Files/Links** ...estions 5. RSVP 6. Content 7. Preview/Send

...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

2. Recipi... | **3. Files/Links** | ...tions | 5. RSVP | 6. Content | 7. Preview/Send

Add file dow... ds 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

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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

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)

Insert question text and explanation

❯ 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

❯ 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.

be

to

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

- **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. Setti...   . Files/Links   4. Qu...   **5. RSVP**   Content   7. Preview/Send

Select Yes

Add and ... RSVP management for the eCard.

○ No

⊙ Yes

   ☑ Allow recipient to bring guests

   [2] 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. Ques... **5. RSVP** Content 7. Preview/Send

Add and edit RSVP management for the eCard.

○ No

◉ Yes

☑ Allow recipient to bring guests

Add session information

2 Maximum number of guests per recipient

SESSION INDEX | ADD SESSION

Session description
Open House - 125 Carrisbrooke

Capacity limit
100

ADD SESSION

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

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.

Message

Image — Description

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

`[toolbar: cut, copy, paste, undo, redo, font color, B, I, U, indent, outdent, align left, align center, align right, justify, numbering, bullets, table, horizontal line]`

`[second toolbar row: web, image, spell check (ABC), paragraph, HTML code, eraser, find]` | 14 ▼ | Arial ▼ | Insert recipient details ▼ | ?

Cusomize 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
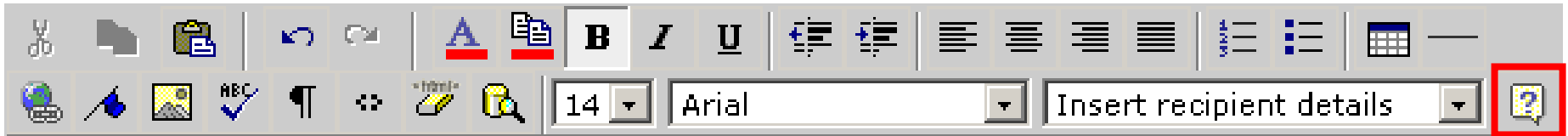
Message Editor

Spell Checking

✓ ABC	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).

HELP - MESSAGE EDITOR

Undo	Redo	Font Colour	Background Colour
Align Center	Align Right	Bullets	Numbers
Add File	Spell	Glyph	Help
Times New Roman Font		Show/Hide HTML	

...ou have selected and places it on the

...ve selected and places it on the
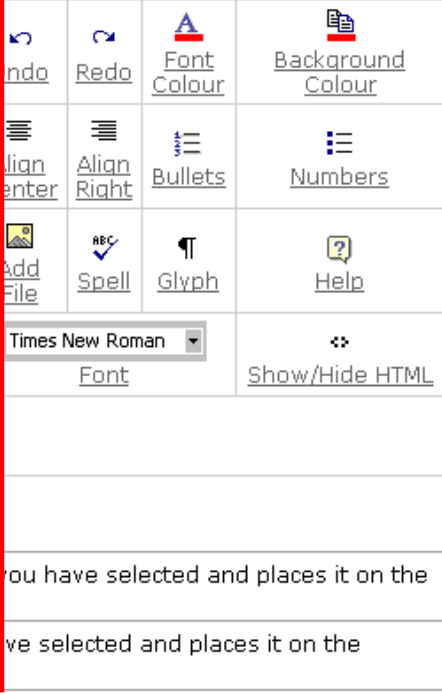
| 📋 | Paste: Pastes the contents of the clipboard into a new location |

Adding Personal Content

HTML   PRINT FRIENDLY   PLAIN TEXT   PERSONAL IMAGE

INACTIVITY LOGOUT IN: 18:12

Arial   8

Insert recipient details

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

Dear %!FIRSTNAME!%,

7. Preview and Send

7. Preview and Send

WEB LINKS » PREA Center

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

PREFLIGHT REPORT

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

STEP	REQUIRED	COMPLETED	EDIT
Title and Subject	Yes	Yes	EDIT
Recipients	Yes	Yes, 1 recipient(s)	EDIT
Content	Yes	Yes	EDIT
Files and Links	No	Yes, 1 file(s) 1 link(s)	EDIT
Questions	Yes	Yes, 2 question(s)	EDIT
RSVP	Yes	Yes, 1 session(s)	EDIT

Edit any previous step

SEND NOW

Click the button below to send this eCard now.

SEND NOW

Send Now

Send later Select date and time

< | 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

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

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
	eCard coure at The Exchange	2	2	100%	0	0	7 Jan 06
	Action Pack Beta Test	15	8	57%	1	0	31 Oct 05
	Week BluePrint	35	28	82%	1	0	14 Feb 05
EML	BluePrint Report for week 2	35	30	88%	1	1	7 Feb 05
EML	BluePrint Class Roster	34	29	88%	1	0	27 Jan 05
EML	BluePrint Production Evaluation	35	29	85%	1	0	27 Jan 05
	Just Listed in Carrisbrooke	1	1	100%	0	0	19 Jan 05

Reporting Summary

Reporting General

Report Toolbar

Reporting Comments

Reporting Locations

Reporting Domains

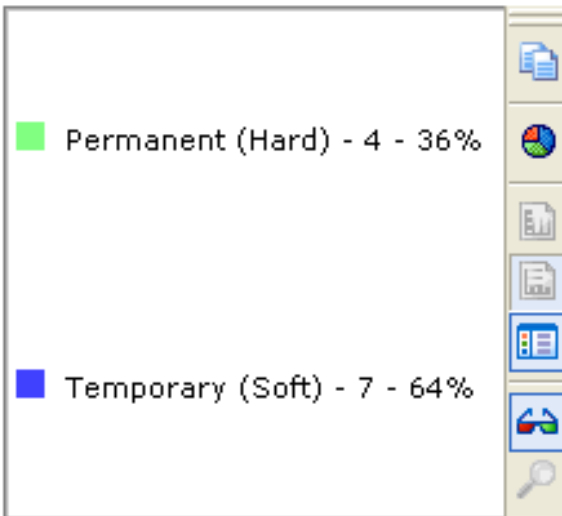| SUMMARY | GENERAL | COMMENTS | LOCATIONS | DOMAINS | OPT OUTS | UNDELIVERABLE | RSVP | Q & A | FILES | URLS |

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
TOTAL: 13	35	28	82.35%	11	1	2.86%	0

▸ PRINT   ▸ EXPORT

Reporting Undeliverable

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

Working with Sellers - 1
Objections and Negotiation:
ng and Lead Generation - 9
Working With Buyers - 1

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%
TOTAL	16	100%

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

REPORTING > NOTIFICATION

SELECT USAGE

Do you want to receive Reporting Notification?

◉ Disabled

SUBMIT

NOTIFICATION

○ Enabled

1. FREQUENCY

How often should the Reporting Notification email be sent?

Every [1] day(s)

2. START AGE

When should the first Reporting Notification email be sent?

After the eCard is [1] 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

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

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

Administrative Tools

Administrative Tools

Administrative Tools

Administrative Tools

View

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

Administrative Tools

- **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

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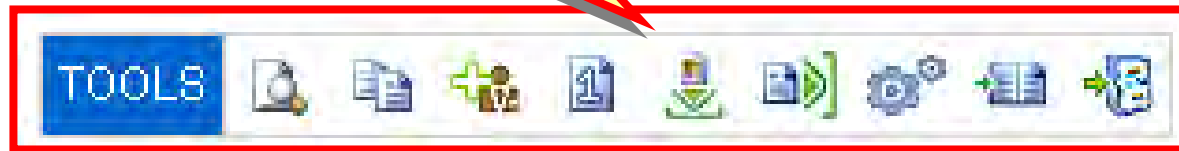
- **Download** - will allow you to download the eCard as a pdf file, JPG image or single PNG file for high resolution printing.

Administrative Tools

- **Export Reports** 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

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

Administrative Tools
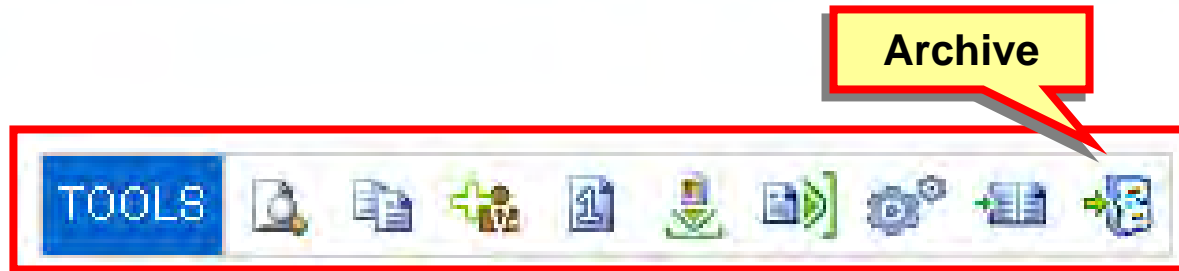
Archive

- **Archive** stores all sent eCards in a separate folder. Templates will not be available to edit, copy or track usage.
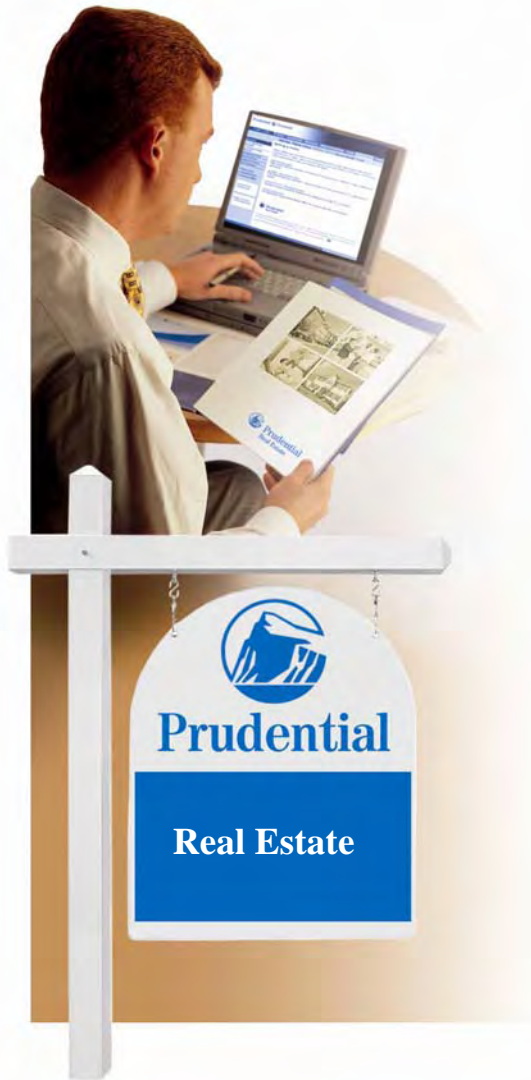
Lesson 3

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 …

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**