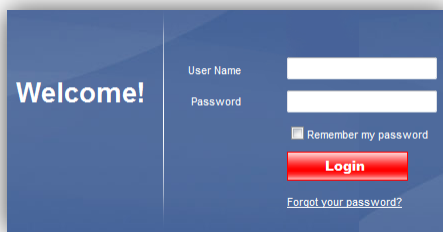# rDesk CRM Flyers

rDesk CRM Flyers gives you the ability to create, email, and print professional-looking flyers for your listings. You can choose from several templates or create your own as well as customize the photos for your flyer. When you create and send a flyer to a client from rDesk CRM, it will be tracked in the History in the contact record.
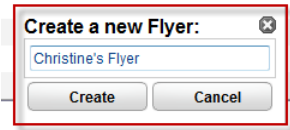
1) Login to rDesk

2) Click **Marketing**
3) Click **Flyers**
4) To create a new flyer, click the **Create New Flyer** button
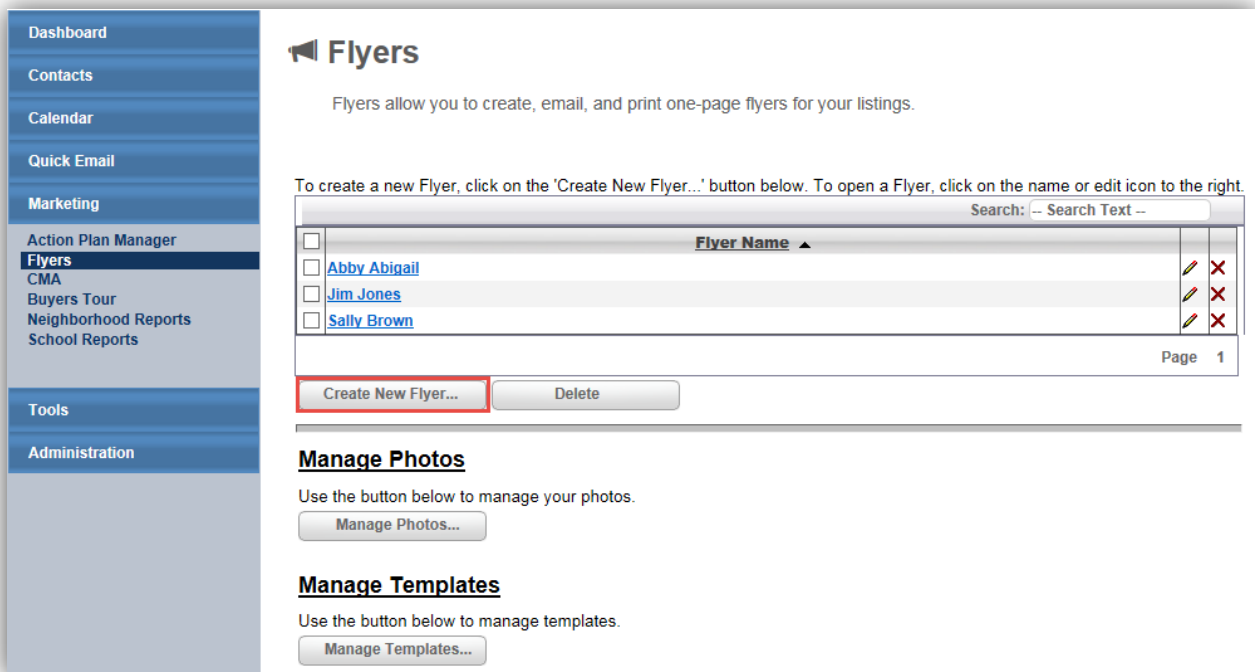
a. Enter the title for the flyer, click **Create**

9/25/2015

Create a new Flyer: ⊗

Christine's Flyer

| Create | Cancel |

b. The **Choose Template** tab displays, click a category to view the choices

9/25/2015

📢 Flyers

Flyers allow you to create, email, and print one-page flyers for your listings.

Start | **Choose Template**

◀ **Step 2 of 5** ▶

New

Click on the folders below to see all templates by category.

- 📁 **New**
- 📁 Basic
- 📁 Classic
- 📁 Map
- 📁 Modern
- 📁 Exclusive
- 📁 Elegant
- 📁 Multi Photo
- 📁 Contemporary
- 📁 ABCRealty
- 📁 My Company

Select the flyer you would like to create from the templates below and proceed to the next step.

○ **Beige Sidebar** ○ **Hollywood** ○ **Blue Soft**

○ **Gray Simple** ○ **Gray Block Blue** ○ **Blue Round Boxed**

○ **Red Boxed** ○ **Broadway** ○ **Stucco Taupe**

○ **Blue Line Box** ○ **Green Leaves** ○ **Soft Blue**

○ **Stone** ○ **Craft Wood** ○ **Orange Marble**

○ **Black Slate** ○ **BillardTrans** ○ **Sunrise**

○ **Warm** ○ **Sky**

9/25/2015

    c. Click on the radio button to choose a template

    d. Click the forward arrow (next to the Step 2 of 5) the **Select Listing tab** displays

    e. Click the radio button next to,

         i. **Select MLS Listing** to choose from your active listings

        ii. **Enter MLS** Listing to enter a MLS # for an active listing

       iii. **Create Blank Flyer** to create a flyer without a listing

📢 **Flyers**

Flyers allow you to create, email, and print one-page flyers for your listings.

Start	Choose Template	**Select Listing**

◀ **Step 3 of 5** ▶

Please specify the listing to be used for this flyer. You may select from one of your listings below or specify the MLS Listing #. Or you can create a flyer from scratch by choosing to Create Blank Flyer.

Please select the listing below by clicking on the MLS # and then proceed to the next step.

◉ **Select MLS Listing**   ○ **Enter MLS Listing #**   ○ **Create Blank Flyer**

Status: | All ▼ |

	MLS #	Address
○	076080322	3 Miguel Angel Herrera #401B, Cabo San Lucas, CA
○	110048234	534 Wensley Ave, El Centro, CA 92243
○	090060234	4970 Lassen, Oceanside, CA 92056
○	090024692	, San Diego, CA 92154
○	090002460	4209 Stu, San Diego, CA 92154
○	090024696	, Spring Valley, CA 91977
○	100002126	2010 White Birch, Vista, CA 92081

    f. Click the forward arrow, the **Flyer Information** tab displays

9/25/2015

📣 Flyers

Flyers allow you to create, email, and print one-page flyers for your listings.

| Start | Choose Template | Select Listing | **Flyer Information** | Print Flyer |

◀ **Step 4 of 5** ▶

Client Data:

Associated Client: [   ] [Lookup Contact...]

Flyer Photos:

Agent Photo   Office Logo   Listing Photo

◀   change   change   change   ▶

Header:

Header   [Your Dream Home]   add from list

Agent Data:

First Name	Christine
Last Name	Markuson
Office Name	ABC Realty Demo
Office Phone	949-681-4835
Email	christine.markuson@real
Web Site	http://christinemarkuson.i

Listing Data: [Import Listing...]

List Price	$200,000
Street Number (complete for map use only)	3
Street Name (complete for map use only)	Miguel Angel Herrera
City (complete for map use only)	Cabo San Lucas
State (complete for map use only)	CA
Zip (complete for map use only)	
Remarks (max. 500 characters)	There will be on site security guard, as soon as H.O.A. gets established. The apartment is set up for A/C units. The unit

286 of 500 max. characters

Beds	2
Baths	2
MLS#	076080322

Features:

| Features1 | 2 Bedrooms | add from: | listing features | other features |
Features2	2 Bathrooms	add from:	listing features	other features
Features3	Built In 2005	add from:	listing features	other features
Features4		add from:	listing features	other features
Features5		add from:	listing features	other features
Features6		add from:	listing features	other features
Features7		add from:	listing features	other features
Features8		add from:	listing features	other features

[Generate Flyer]   [Email Flyer...]

9/25/2015

i. To enter an **Associated Client**, click **Lookup Contact**
ii. A list of contacts will display, click the link for the name of the contact
iii. OR click **Create new Contact** to enter a new contact and associate them to this flyer
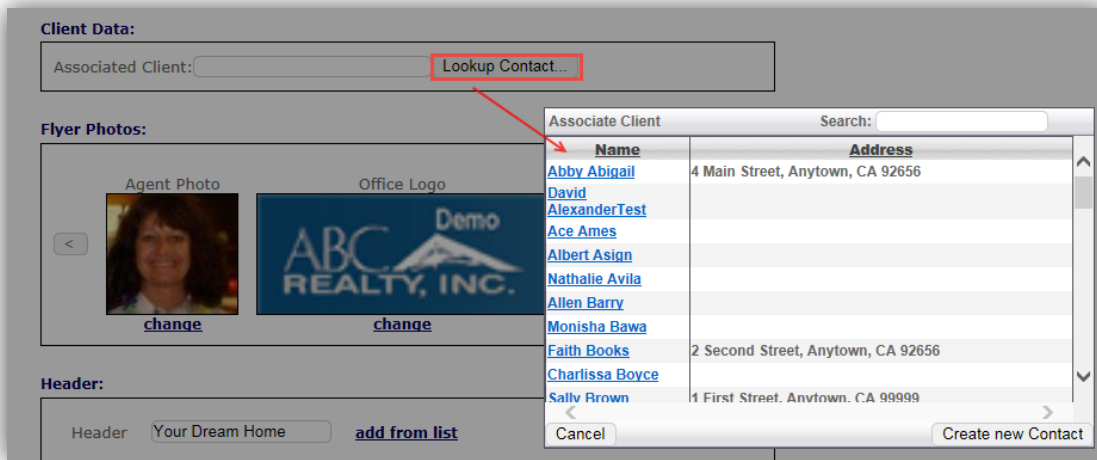
Note: When associating a client/contact to the flyer, the activity will be tracked in History in the contact's record.
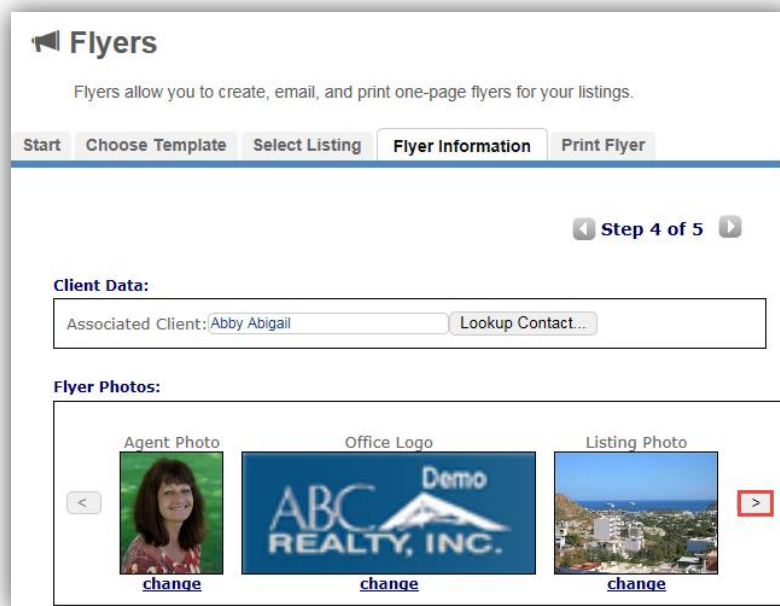
iv. To change the **Agent Photo**, click the change link
  1. The **Select Photo** window will display
  2. Click on a **Saved Photo** OR
  3. Click **Browse**, **Upload**, **Save** (to resize) OR **Cancel** (original size), and click new photo
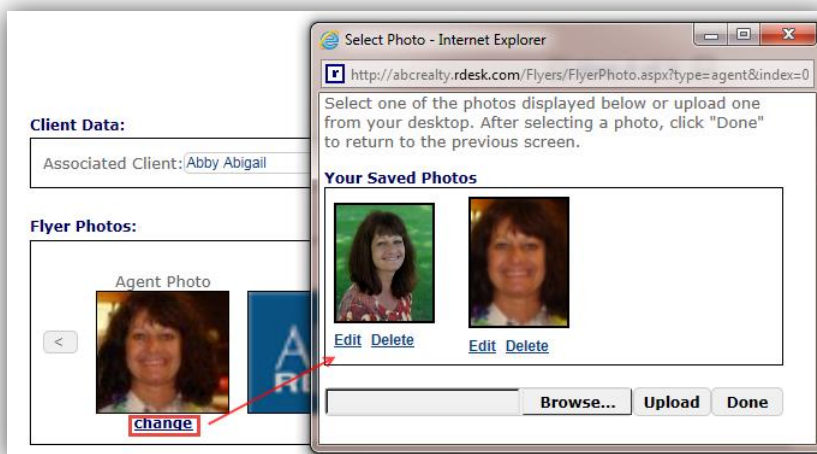
1. Click **Edit** to change the photo size,
   a. Click the **Aspect Ratio** dropdown to make adjustments
2. Click **Delete** to remove the photo
   v. To change the **Office Logo**, click the **change** link
      1. Use the same steps as Agent Photo above

Note: The Agent Photo and Office Logo are automatically displayed from the default photos in your Personal Profile. See the rDesk CRM Personal Profile Quick Start Guide to set-up the logo and photo that displays on the flyer.

   vi. If the listing was pulled from the MLS, the **Listing Photo**(s) will be pre-populated based on the number of photos needed for your chosen template
      1. Use the **right arrow** and **left arrow** to scroll through the photos
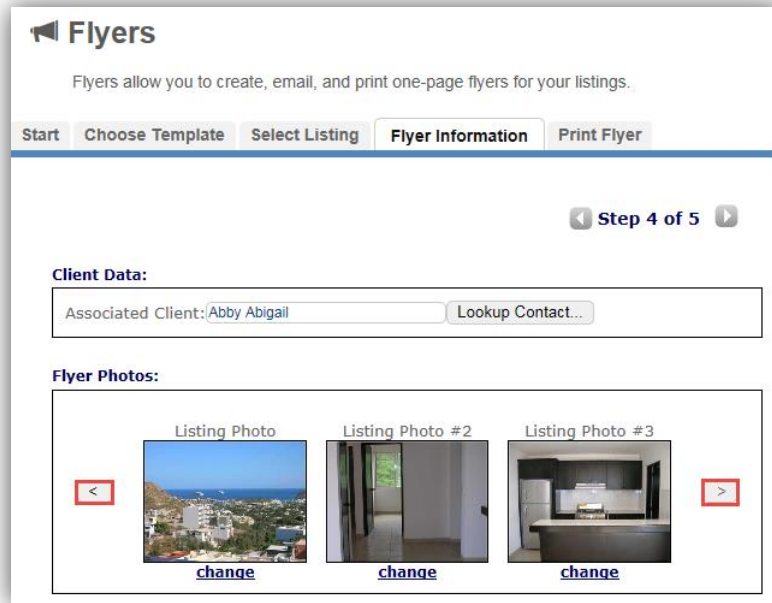
2. To change the order or select different photos, click the **change** link under the photo
   a. All MLS photos and your custom saved photos will display
   b. Click on the photo you wish to use, it will appear in the template

9/25/2015
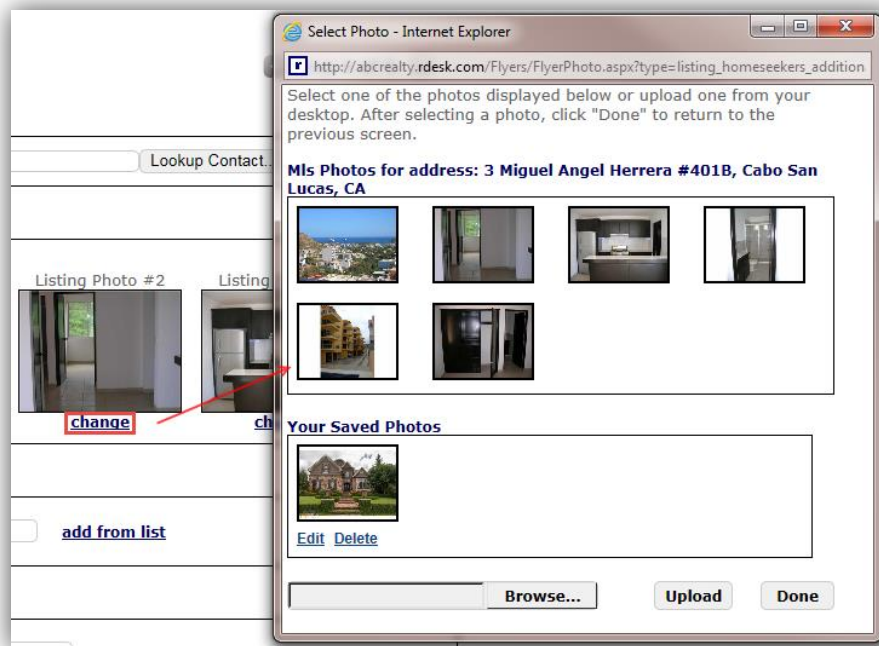
3. If you are creating a blank flyer, use the same steps as Agent Photo and Office Logo above

vii. If your template has a header, click add from list to select or change the Header
1. Click the title in the **Header** window, click **Add Header**
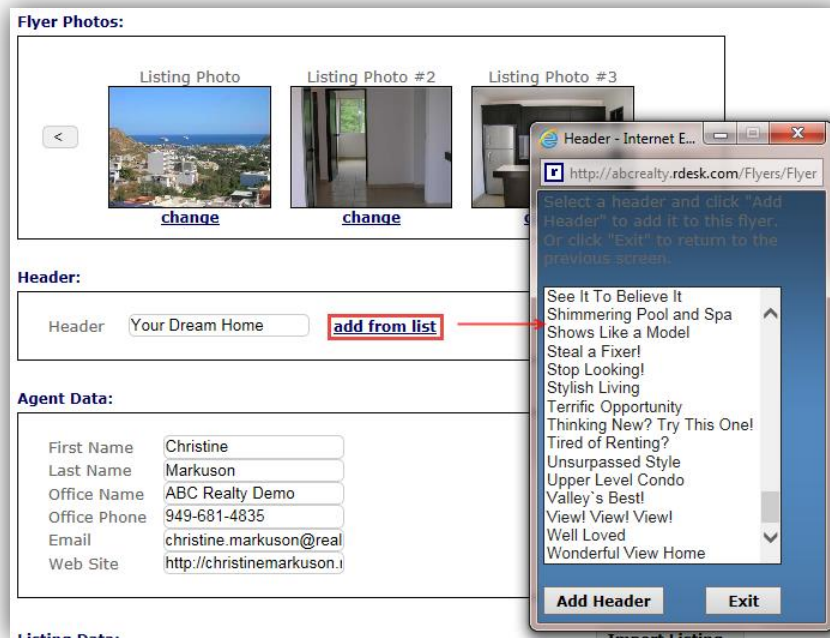
viii. Scroll down to and review the agent data and listing data automatically inserted is complete
ix. If the remarks exceed the 500 characters, revise to ensure they are complete
x. The first six features will be listed, click the listing features or other features links to select different features
g. Click **Generate Flyer**, the flyer will display in the **Print Flyer** tab
    i. Click back to **Flyer Information** tab to make any revisions
    ii. Click **Ctrl P** to print the flyer

h. OR Click **Email Flyer** to email the flyer (PDF format)
   i. The agent's email address will automatically be populated
   ii. Complete the **To**, **Subjec**t and **Introduction**

9/25/2015

📢 **Flyers**

Flyers allow you to create, email, and print one-page flyers for your listings.

| Start | Choose Template | Select Listing | Flyer Information | **Email Flyer** |

Email Your Flyer   ◄   **Step 5 of 5**   ►

Please separate email addresses with commas.

From: christine.markuson@realestatedigital.com

To: abby@abby.com

CC:

BCC:

☐ Send myself BCC

Subject: Cabo!

Introduction: Thought you might be interested in this vacation property!

[**Send**]   [**Cancel**]

iii.   Click **Send**, a message will display "**Email was sent successfully**"

5) To create a flyer that is embedded in an email, versus as an attachment

a.   Choose a Template that uses HTML
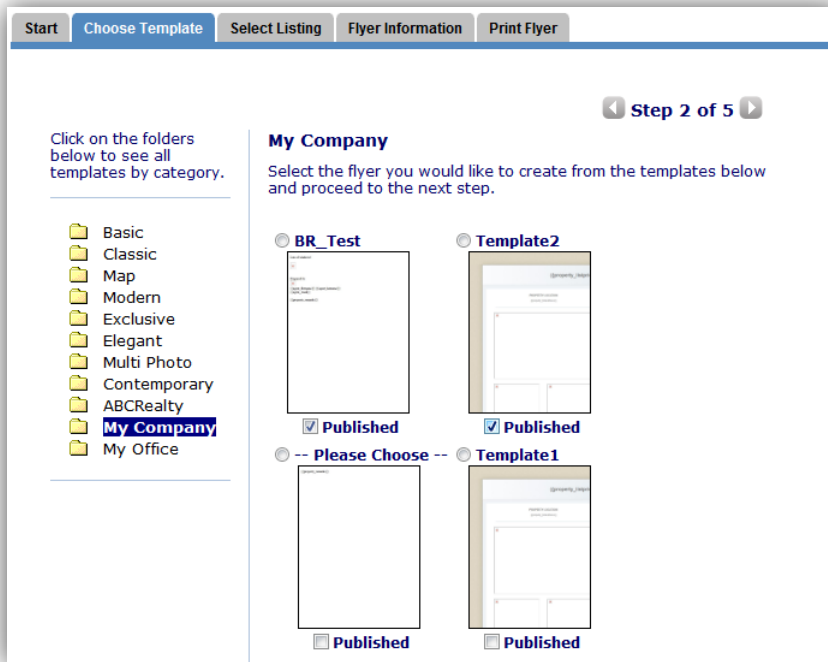
b. At Step 5, Email Flyer, change Select Type from "PDF" to "HTML"
   i. The Flyer will display below the Introduction
   ii. Click Send

9/25/2015

Flyers

Flyers allow you to create, email, and print one-page flyers for your listings.

Start | Choose Template | Select Listing | Flyer Information | **Email Flyer**

Email Your Flyer   ◀ **Step 5 of 5** ▶

Please separate email addresses with commas.

From: christine.markuson@realestatedigital.com

To: abby@abby.com

CC:

BCC:

☐ Send myself BCC

Subject:

Select Type: ⦿ PDF ◯ HTML

Introduction:

[Send]   [Cancel]

6) To edit an existing flyer, click the link for the **Flyer Name** or the pencil icon
7) To remove a flyer, click the red "**X**"

◀ Flyers

Flyers allow you to create, email, and print one-page flyers for your listings.

To create a new Flyer, click on the 'Create New Flyer...' button below. To open a Flyer, click on the name or edit icon to the right.

	Search: -- Search Text --
Flyer Name ▲	
☐ **Abby Abigail**	🖉 ✗
☐ **Christine's Flyer**	🖉 ✗
☐ **Jim Jones**	🖉 ✗
☐ **Sally Brown**	🖉 ✗
	Page 1

Create New Flyer...	Delete

Manage Photos

Use the button below to manage your photos.

Manage Photos...

Manage Templates
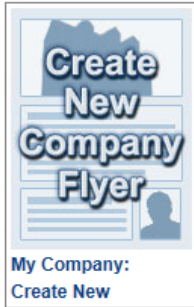
Use the button below to manage templates.

Manage Templates...

8) Click **Manage Photos**,
   a. To add, select the type of photo by clicking on the radio button
      i. Click **Browse**, **Upload**
   b. To delete, check the **Delete** box over the photo(s)
      i. Click **Delete Selected Photos** to remove

9/25/2015
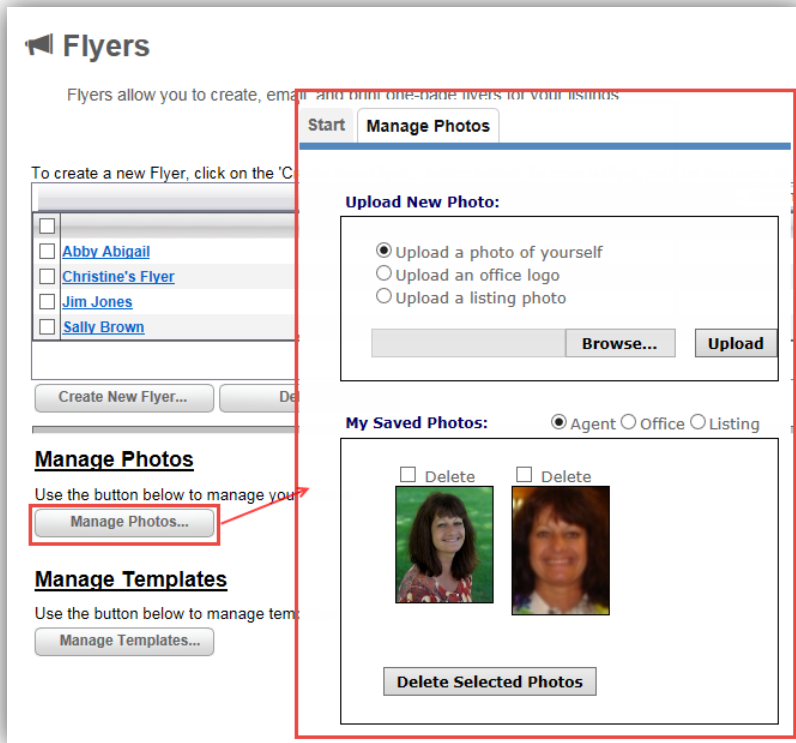
9) For users with the Flyer Admin role, click **Manage Templates**,
   a. To edit an existing flyer template, click on the template

9/25/2015

   i. Edit the template in the editor, click **Save As**
   ii. Click **Browse**, **Upload**, to add a custom image
  b. To create a new flyer template, click on the "create new" template
   i. Enter the content in the editor

9/25/2015

For a list of the available tokens for Flyers, see the Flyer Tokens User Guide!

    ii. Enter a name and click **Save As**

    iii. Click **Browse**, **Upload**, to add a custom image

Note: You will find your new template in the Choose Template tab, under the My Company or My Office folder

9/25/2015