

# Getting Started with **VISION**<sup>®</sup> by market leader.



## Getting Started with Vision

This powerful contact management solution is designed to help you cultivate the prospects you acquire from your website—or any other source—into active clients.

The first step to success with Vision is to customize your website. We strongly recommend that you customize your site now to ensure the information is accurate and the way you want to present it to your website visitors!

## Setting Up Your Account

### Step 1: Sign into Vision through your agent website

1. Open a web browser and type in your website address (e.g., www.mywebsite.com).
2. Scroll to the bottom of your webpage and click on “Admin Login.”
3. Enter your username and password and click “Login.”

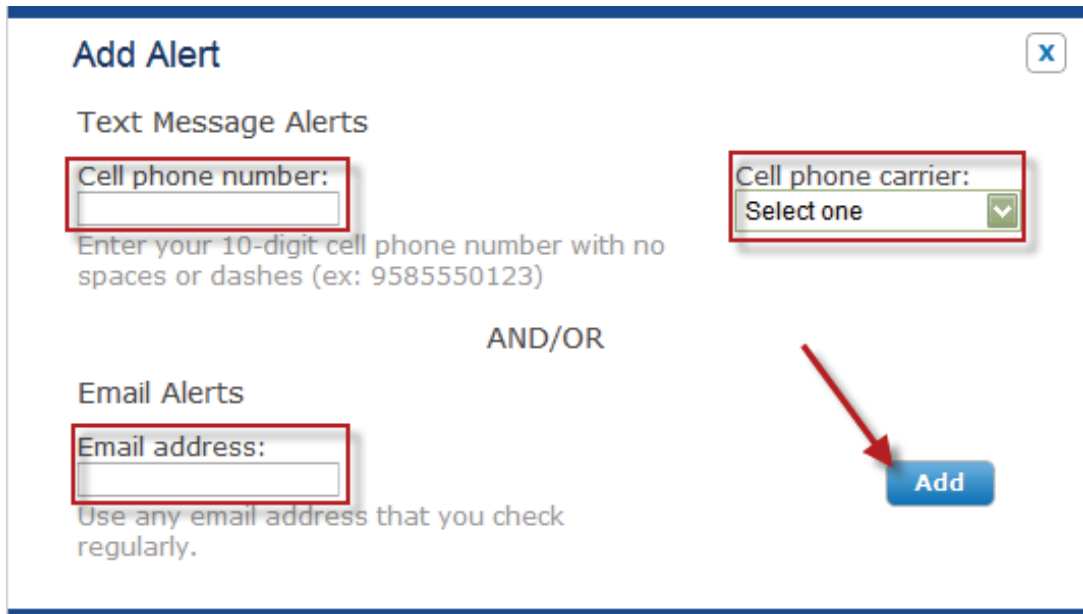
### Step 2: Customize your Notification Alerts

1. On the left hand navigation section of your Agent Dashboard, click “Website.”
2. Click the “Alerts” link. (Figure 1)
3. For text alerts, click the “Add” button and enter in your phone number and provider. For email alerts, enter your email address.
4. Click “Add” to save your alert(s). (Figure 2)

*Please note you are limited to a total of three email and/or text message alerts.*

The screenshot shows the Vision Admin interface. On the left is a navigation menu with categories: Dashboard, My Inbox (Messages, Reminders), Prospects, Manage Listings, Search MLS, and Admin. Under Admin, 'Website' and 'Alerts' are highlighted with red boxes. The main content area has tabs for Website, Email, Site Activity, and Performance Evaluator. The 'Website' tab is active, showing a left sidebar with links: General Info, Profile Info, Titles and Descriptions, Main Text, Sell Text, Search Widget, Alerts (highlighted with a red box), Communities Served, and Listing Address. The main content area is titled 'Get Notified when Prospects Contact You' and contains a table with columns 'Type', 'Email Address / Cell Phone', and 'Delete'. The table is currently empty, showing 'No records returned.' A red arrow points to an 'Add' button at the bottom left of the table.

(Fig. 1)



**Add Alert** X

**Text Message Alerts**

Cell phone number:

Cell phone carrier:

Enter your 10-digit cell phone number with no spaces or dashes (ex: 9585550123)

AND/OR

**Email Alerts**

Email address:

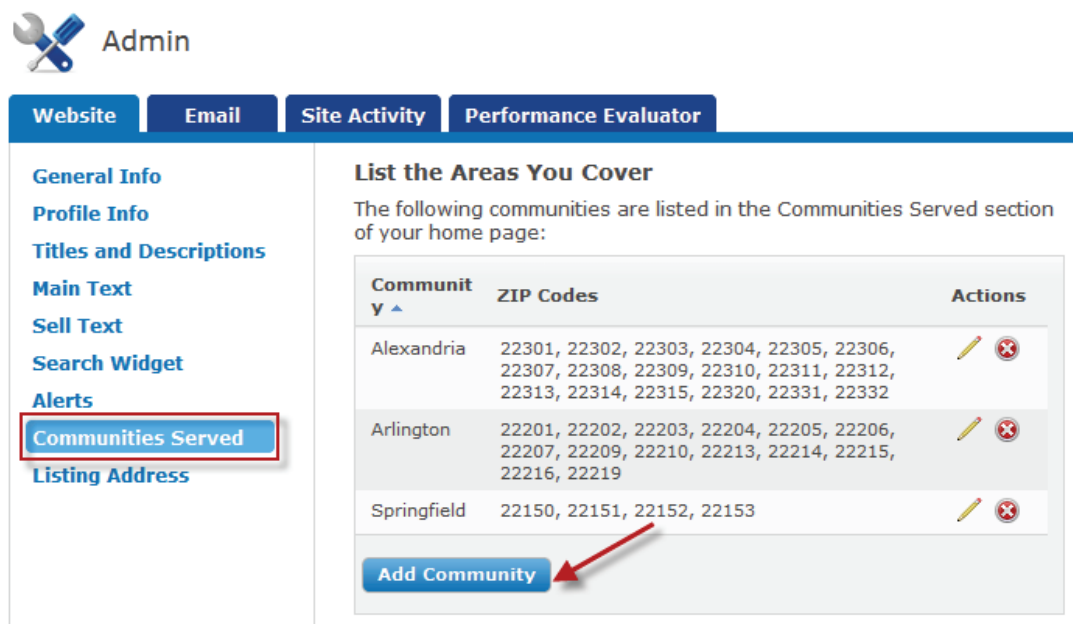
Use any email address that you check regularly.

(Fig. 2)

**Step 3:** Customize your Communities Served

Please note your subscription areas are already entered, but you need to select a map center for them. To do this, click on the pencil icon.

1. Click "Communities Served." (Figure 3)
2. Click "Add Community."
3. Type in the name of a community and click "Add."
4. Enter the ZIP code(s) associated with the community. Click "Add Zip."
5. Click the "Add Center" button. Click the red pin and drag it to the map center for that area. (Figure 4)
6. Click "Done."



**Admin**

Website | Email | Site Activity | Performance Evaluator

**General Info**

- Profile Info
- Titles and Descriptions
- Main Text
- Sell Text
- Search Widget
- Alerts
- Communities Served**
- Listing Address

**List the Areas You Cover**

The following communities are listed in the Communities Served section of your home page:

Communit y ^	ZIP Codes	Actions
Alexandria	22301, 22302, 22303, 22304, 22305, 22306, 22307, 22308, 22309, 22310, 22311, 22312, 22313, 22314, 22315, 22320, 22331, 22332	
Arlington	22201, 22202, 22203, 22204, 22205, 22206, 22207, 22209, 22210, 22213, 22214, 22215, 22216, 22219	
Springfield	22150, 22151, 22152, 22153	

(Fig. 3)

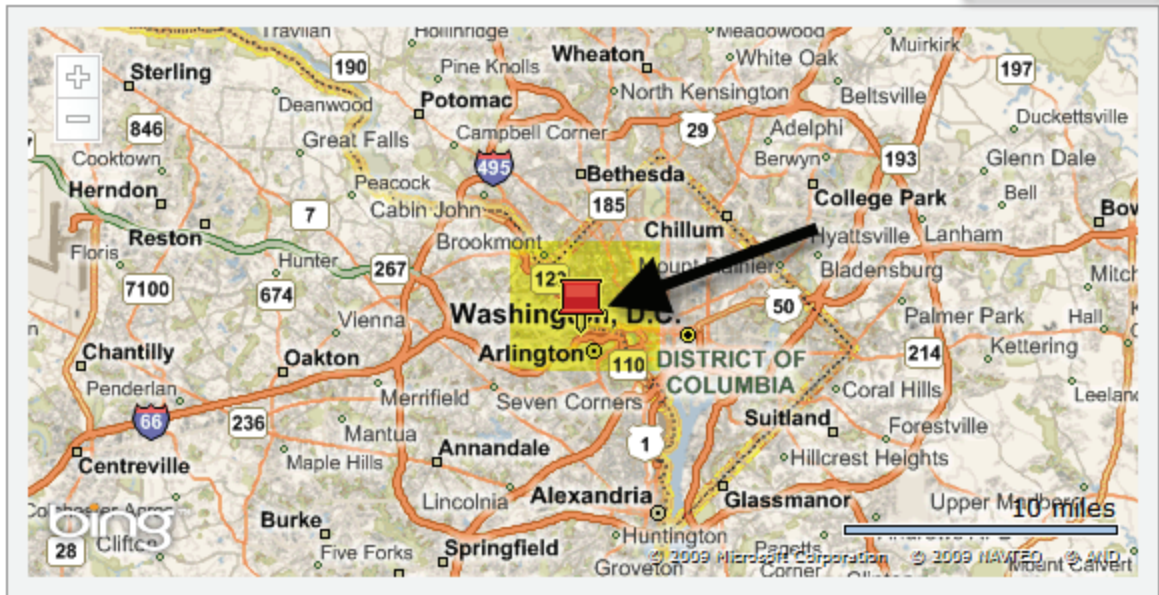
## Edit Community

Name of Community:

Add a Zip Code:

22301  22302  22303  22304  22305  22306  22307   
22308  22309  22310  22311  22312  22313  22314   
22315  22320  22331  22332

Center of Community: *(Click and Drag pin to center of community.)*



(Fig. 4)

### Step 4: Customize your Profile and General Info


1. To change your contact information and accolades on your website, click on the “General Info” and “Profile Info” tabs. (Figure 5)
2. Click “Edit” to make the desired changes. Click “Save.”

Website | Email | Site Activity | Performance Evaluator

General Info  
Profile Info  
Titles and Descriptions  
Main Text  
Sell Text  
Search Widget  
Alerts  
Communities Served  
Listing Address

### Review and Edit Your Personal Contact Information

You can edit your personal contact information that appears on your website. [View your website](#)

**Name:** Kelly Olsen **Current Photo:**  


**Cell Phone:** 958-425-5500

**Login:** kellyo@virginiarealty.com

**Vision Email:** kellyo@virginiarealty.com

**External Email:** kellyolsen@live.com

**Password:** \*\*\*\*\*

**Agent MLS ID:** 17824Metropolitan Regional Information Systems

**Additional Info:** additional info

**Bio:** Bio stuff

**Awards:** awards- i have lots

(Fig. 5)

#### Step 5: Customize your signature for all your outgoing emails

1. Click the "Email" tab.
2. Click the "Email Signature" link. (Figure 6)
3. Edit your signature.
4. Click "Save."

Website | Email | Site Activity | Performance Evaluator

Listing Alert Campaign  
Message Templates  
Email Signature

### Edit Your Signature that is Added to Every Email

When you send an email message to a prospect, the system adds the following text to the end. Messages automatically generated by the system also include this email signature. You can change your name or contact information, but keep in mind that all prospects see this information on each email they receive from you.

Kelly Olsen  
Virginia Realty  
Office phone: 123-456-7890  
Email: kellyo@virginiarealty.com  
Website: http://www.virginiarealty.com

(Fig. 6)