Welcome to ONE SUITE

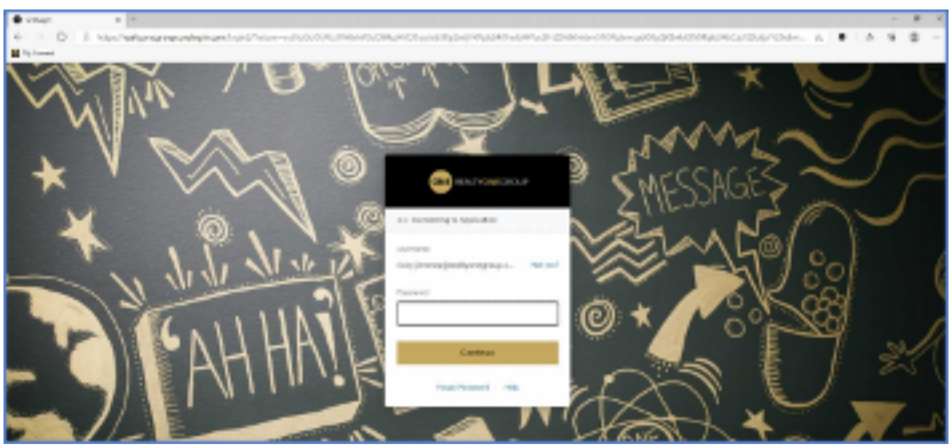
There are many ways to personalize your business website and interact with your contacts using the ONE Suite platform. To help you get started check out this Getting Started Guide, and be sure to click "Training Videos" and Training Documents" within the platform to get additional help!

Here are some tips to get started:

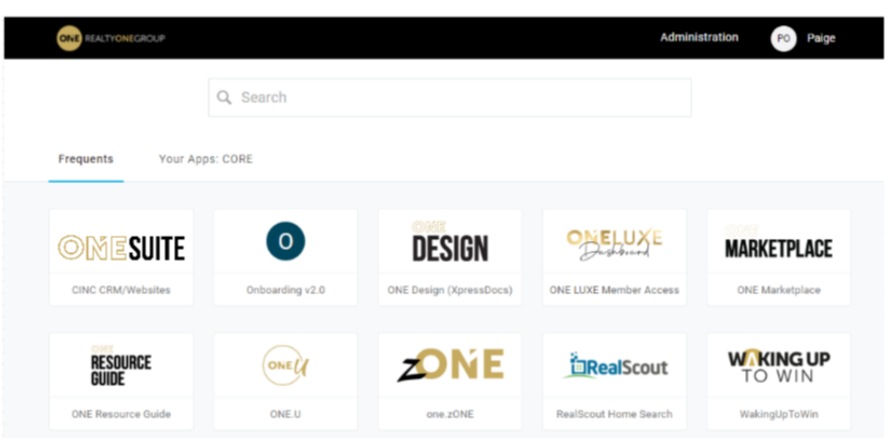
1 Accessing your ONE Suite account.

When you register for ONE Suite, make sure to use the same email as your zONE account to enable the single sign on functionality. If you use a different email, you will receive an error message.

Sign into OneLogin

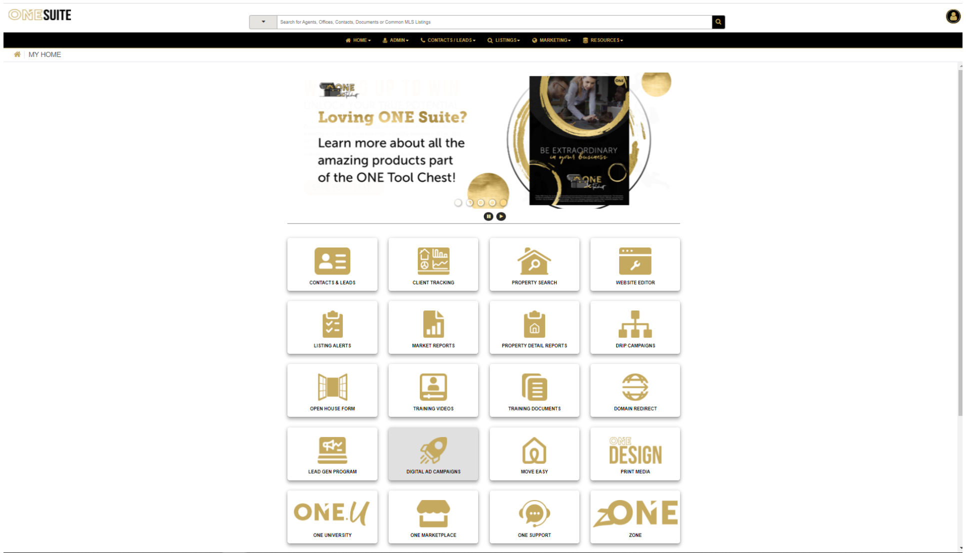


Choose the ONE Suite/CRM tile



REALTYONEGROUP

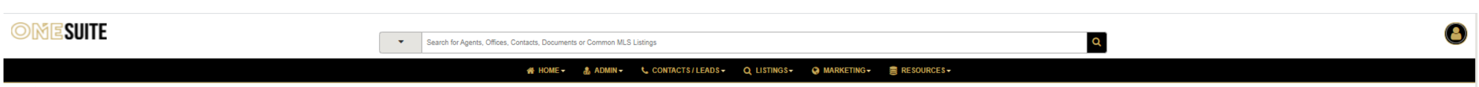
You will start out at the home screen. This is where your contacts, personal info, and client interactions are managed. All the tiles on this page are interactive, including the informational banner the top of the screen. You can also access your information using the drop-down fields on the mean bar.



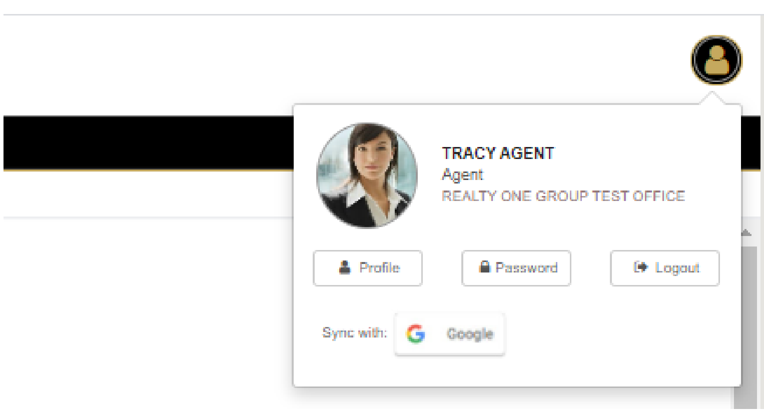
Managing your Profile.

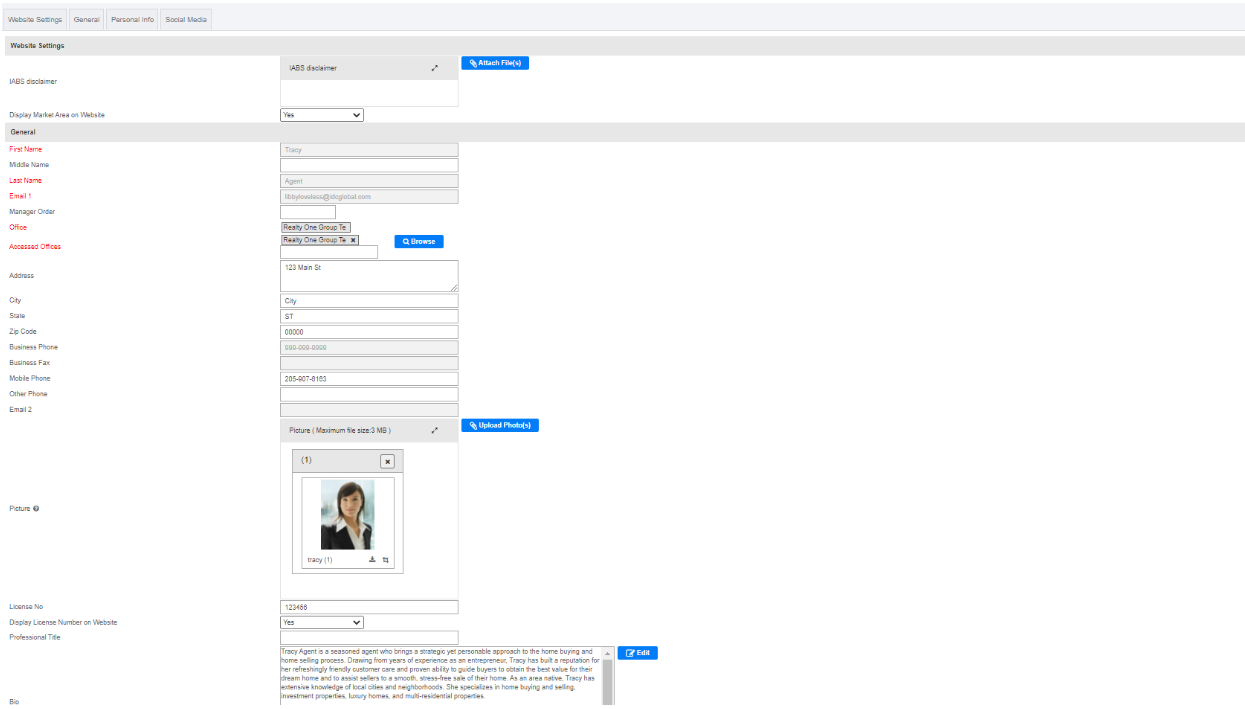
2 Your ONE Suite profile contains the personal details that are displayed on your agent website. Address, phone, bio (about me), social media links, and photo, can be edited by clicking in the top right of the screen on the head shot bubble. Be sure to "Save" once you have finished editing any of your profile information. If you would like to edit any grayed out areas, you must reach out to ONE Support to do so.

To make updates, click on the circle in the top right. It may show your business head shot or have a gold and black icon as a place holder.



Then click on Profile



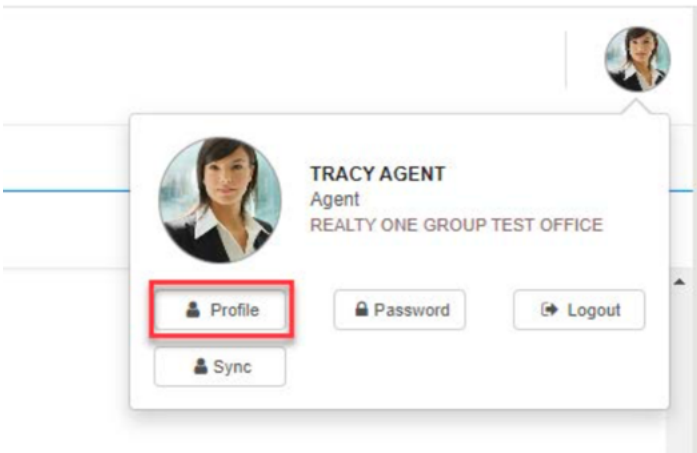


In the Bio section there is a web editor which allows you to edit and add source code as needed.

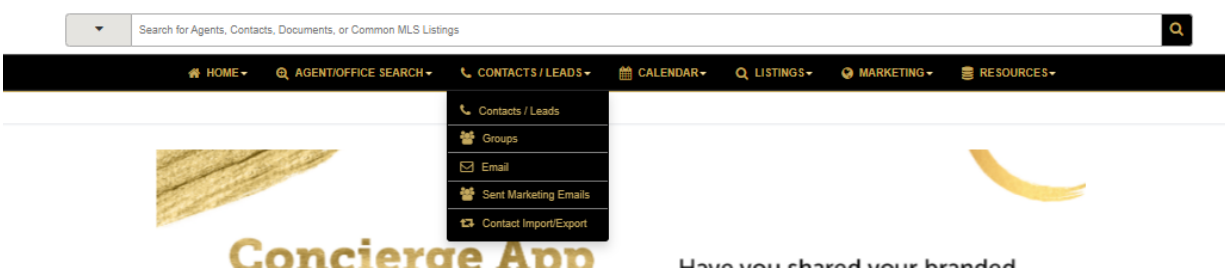
At the bottom of your Profile you can add your social media links. When these fields are populated, you will see the associated social media buttons/icons on your website. When clicked on, the buttons/icons will redirect your clients to your social media pages.

3 Importing your contacts

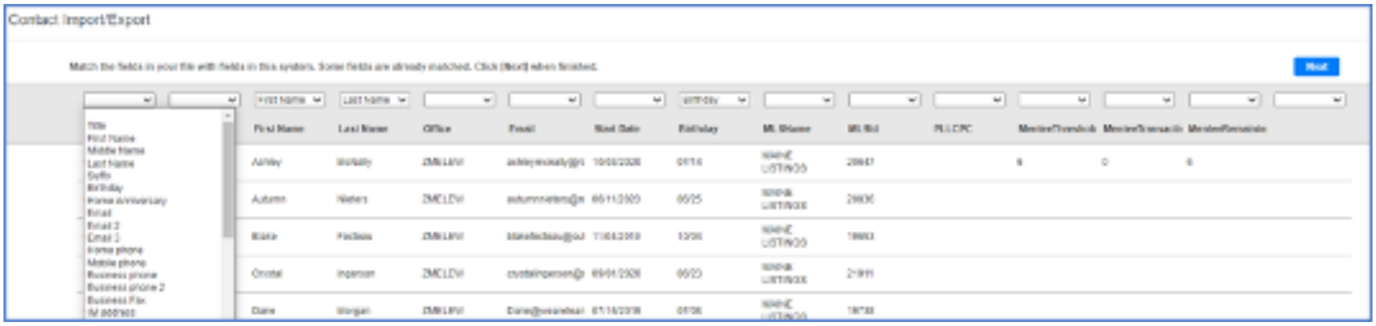
If you have contacts in your Google, Office 365, or Outlook account, you can synchronize those to ONE Suite. To sync those contacts, click on the circle at the top right corner, select Profile, scroll down the page to "Synchronize with" and populate the 3 highlighted fields. *It is recommended, as a best practice, to sync these types of contacts first, before you import any additional Excel or CSV contact files/databases.*



If you have a contact database in an Excel or CSV file, this can be uploaded into your database after a contact sync. In your CRM, click on the Contacts/Leads folder and select Contact Import/Export.



ONE Suite will walk you through the process to upload your file. Once the file is loaded, using the drop down boxes above each data column, you will need to associate each with the data fields from the ONE Suite CRM. If you do not associate a column, that columns data will not populate in CINC. You can use our Contact Template to assist in matching fields.

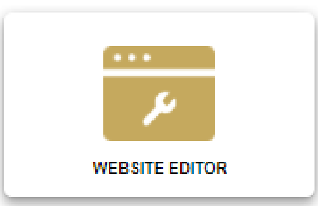


**If you get to this part and find it too confusing, exit out and send an email to ONE Support, attach your excel file and we will help update the information for you.*

4 Customizing your website

There are many ways to customize your website, including adding widgets, creating new pages, blogs, etc.. Remember, there are many tutorial videos and how-to documents located in the CRM to help you accomplish your goals.

To get started, there are 4 simple areas you can customize your site. Profile image, Bio, Landing Page and Banner Image. Access your ONE Suite profile scroll down to "Picture"and upload a profile image based on the size requirements of 3MB, this will be displayed on your website. For Bio, access your ONE Suite profile and scroll down to Bio, enter in any info you want your visitors to know about you. Next, update your Landing page and Banner Image, click on the Website Editor Tile.



In the Website Editor there are 2 menus that allow you to customize your site: "Hi Agent" menu, (located in top left corner) and the 3 dot menu (located in top right corner).

Hi, Agent

This is where you can customize your website template, add a logo, and determine the display order of Featured Listings and Sold properties.

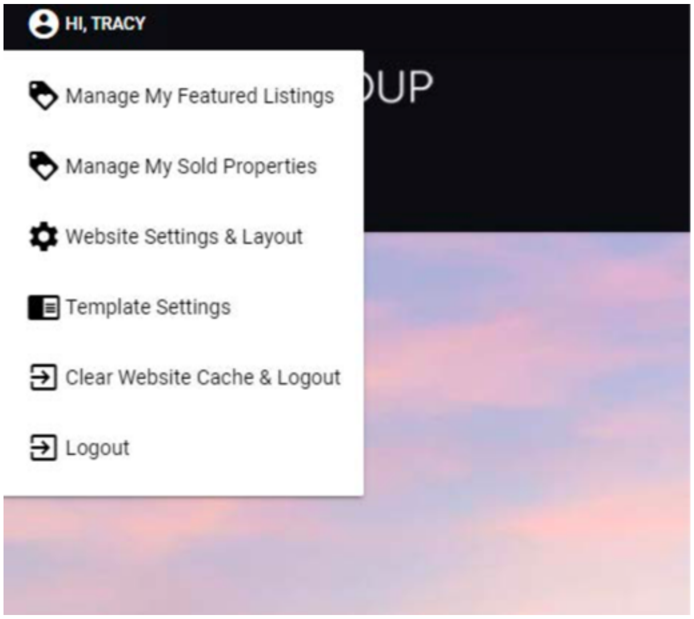
- Manage My Featured Listings: lets you pick which order and filter Listings that are displayed on your landing page's "Featured Listings" section.

- Manage My Sold Properties: lets you pick which order Sold properties are displayed on your landing page.

- Website settings & Layout: For individual agent sites, there are 4 templates to choose from, whereas, Team sites only have 1 layout available. Click on "Change Layout" and then arrow left or right to see the options. This is also where you will enter your Google Analytics and Facebook Pixel ID

- Template Settings: If you have a personal logo, add it here and it will appear at top of your website, to the right of your name. Unfortunately, we are not able to change the placement of your logo to any other orientation.

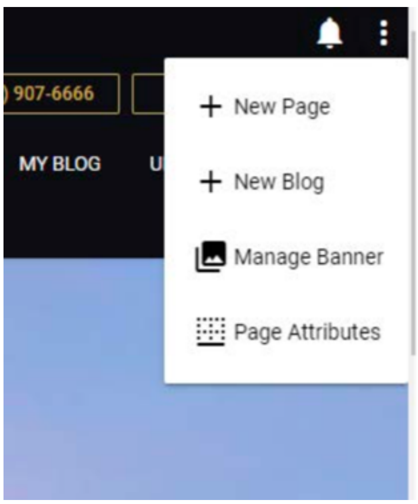
- Clear Website Cache & Logout: If you do not see your updates reflected on your website after making them, you may need to clear your cache, logout, and re-enter the web builder to see the changes.

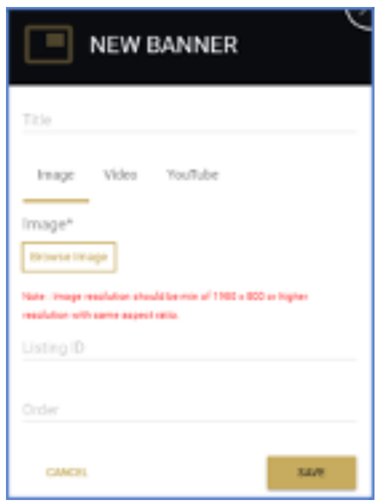


3 Dot Menu

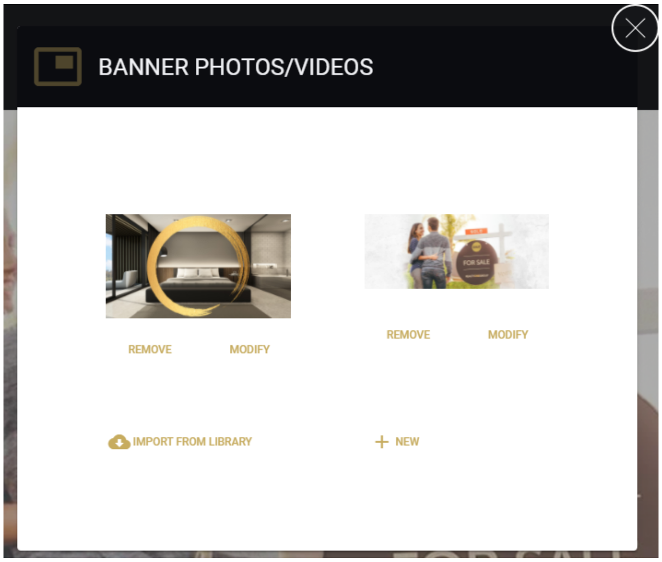
This is where you can add content by creating new pages, menu items, and blogs. You can also manage your landing page banner image here.

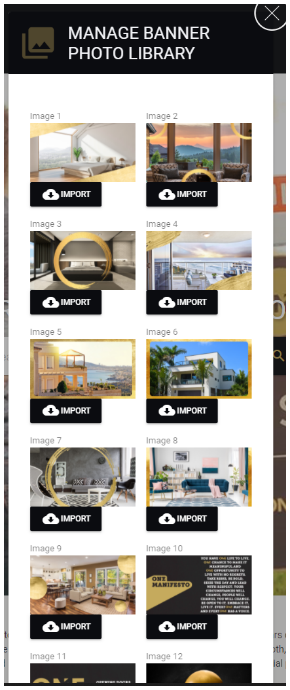
How to change the banner image on your landing page:
Click on the 3 dots, then choose "Manage Banner" to change the image. You can add one image or multiple images (when multiple images are added, each one rotates after7 seconds), a custom video, a linked YouTube video, or a combo of media. Additionally, if you have a hot listing you want to highlight you can insert the listing as banner media as well.





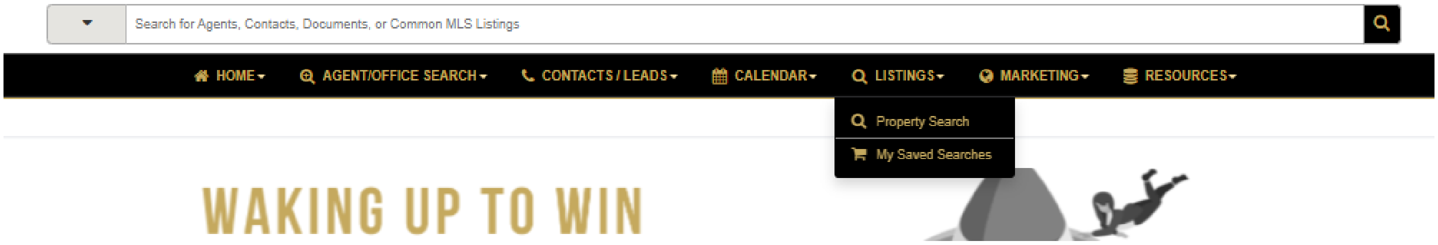
To add or remove media, go to "Manage Banner", click "Remove" under any media you no longer want, or continue to "+NEW" to add additional media from your computer hard drive. Click the Import From Library option to choose from the branded library of high quality images.



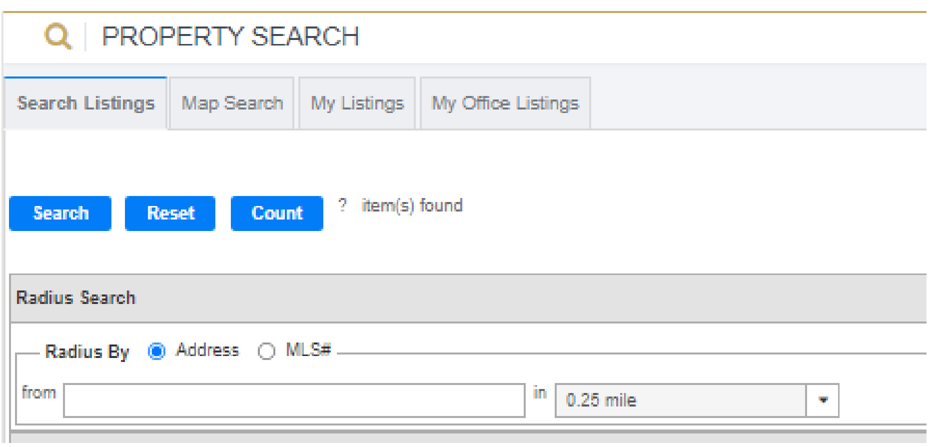


5 Property Search

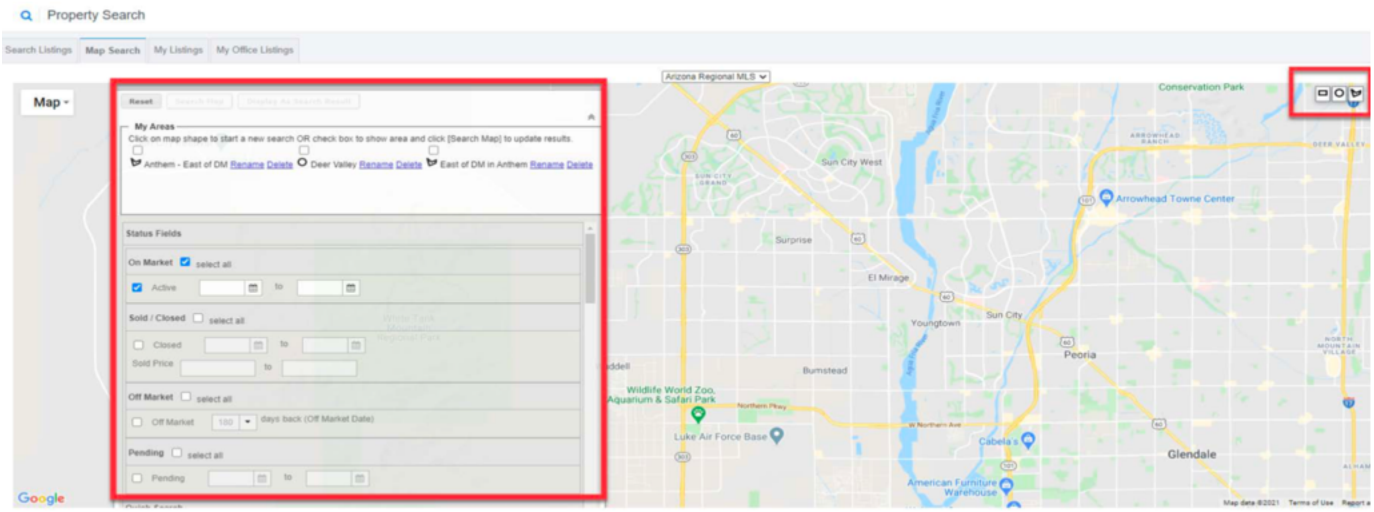
The Property Search is a function that can be utilized to quickly create a list of properties that can be sent to a client on the fly via text message or email. It can also be stored as a Saved Search. To create a Property Search, choose the Listings drop down and select Property Search: or click the Property Search tile from the home page.



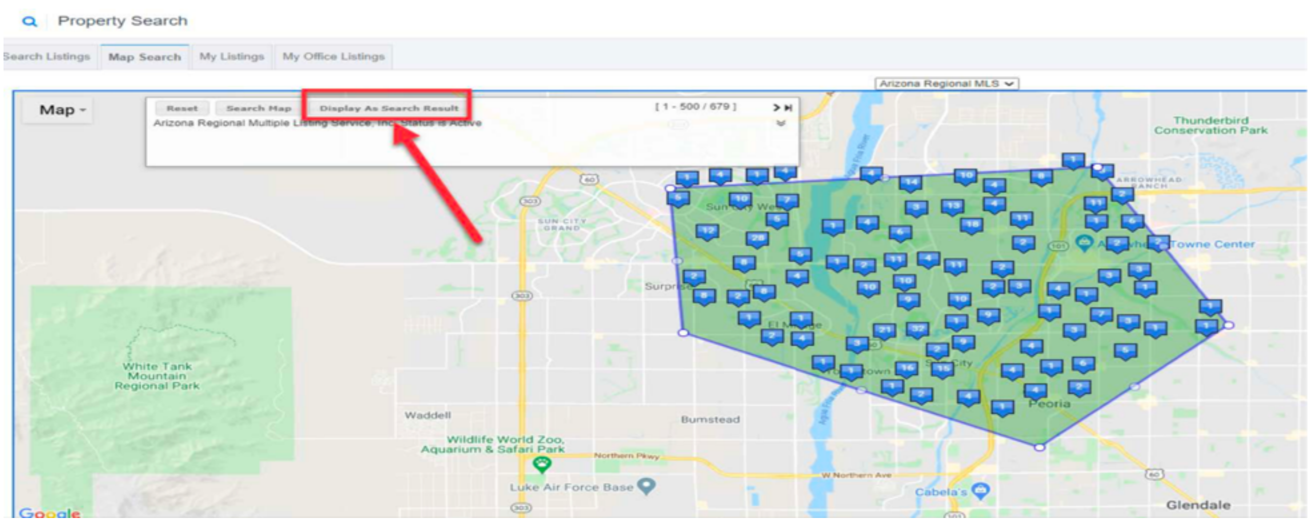
There are several ways to do a Property Search. You can choose: Search Listings, Map Search, My Listings and My Office Listings. For this example below, we are using Map Search.



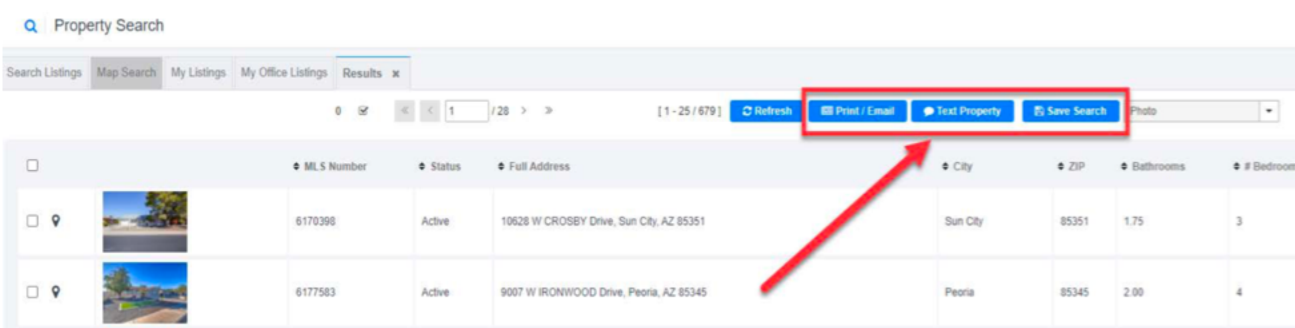
Choose the criteria for the search on the left side, then choose a drawing tool on the upper right to draw out an area of interest. Once the area is defined, Name the search and click OK.



To see the results choose "Display as search results"



You can also email, text or save your search using one of the buttons at the top of the page.



Print/Email

Select one or more properties to print and/or email using one of the multiple templates available. Once a template is selected, it can be perosnalized before sending it out.

Text Property

Select a property to text to a client. To utilize the text feature, your contact's information must include a phone #. The text feature is a one-way communication.

Saved Search

Save the search for later use. Saved Searches can be used as predefined areas of interest on your website.

6 Have you purchased your own "custom" domain name?

ONE Suite can use your custom domain name to direct your clients to your Realty ONE Group provided website. There are 2 options:

Forward

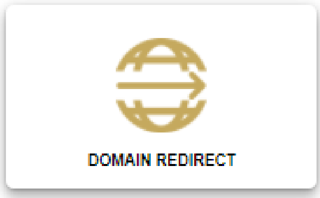
When your client types in your custom domain name, your Realty ONE Group website domain name will appear in the URL.

Redirect

If you want your contacts to see your domain name instead of your Realty ONE Group website domain name in the URL bar, you will want to "Redirect" your domain.

If you want to Forward, this can be done by logging into your domain name provider (domain registrar), choose your domain name, then go to the Manage DNS section and find Forwarding. Add your Realty ONE Group domain name and save. (xxx.myrealtyonegroup.com)

Redirecting is the more popular option, and it requires a little more work to complete.



Click on the Redirect Agent Domain tile, fill out the questionnaire and ONE Support will reach out to you to complete the process.

Resources

Training materials can be found in the ONE Suite home page located in the tiles named Training Videos and Document Center.