

NewsletterPro™ User Guide

The Real Estate Report™ and More

NewsletterPro™ includes an HTML email newsletter called the Real Estate Report™ that you can personalize and send out via email to your entire sphere. The system also includes several other marketing pieces, including a mailing newsletter, articles and more.

The Real Estate Report™ enables you to have the following options:

- Upload your personal photo and company logo
- Add/Update your name and address information
- Include your own commentary within a personalized paragraph in the action panel.
- Add disclosure language including required disclosure logos such as “Equal Housing Opportunity” and “Equal Housing Lender.”
- For Loan Officers: Add Your NMLS originator and branch number.
- Manage your own distribution lists

You can do all this quickly from the comfort of your own personal computer. This quick guide will walk you through the simple instructions for using the NewsletterPro™ System and the Real Estate Report™

1. How do I login to the NewsletterPro™ System?
2. How do I personalize my account?
3. How do I add a personal photo or logo?
4. Can my web address appear on the HTML newsletter?
5. When/how will I receive the HTML newsletter pages?
6. How do I view the monthly newsletter pages?
7. What are the Back Pages?
8. What is the purpose of the Start-Up pages?
9. How do I use the Flyers and Letters?
10. Do I send out all of the pages to each of my contacts each month, or are they targeted toward different audiences?
11. Can I personalize these pages as well?
12. How do I distribute the Newsletters?
13. What if I forget my password?

1. How do I login into NewsletterPro™?

Enter your email as the user name and use your personalized password to enter the site and click **Login**.

- **Note:** You should have received a previous email when you first subscribed which provided you with a valid username and password. If you did not receive this, please contact us for more information.

Example 1:

1. Visit: www.newsletterproonline.com
2. Enter:
 - a. username: [johndoe@yahoo.com](mailto: johndoe@yahoo.com)
 - b. password: *****
3. Click: **Login** and if you'd like, put a check in the **Remember me** box to have the website keep your security information so you can easily login the next time you enter the web page.

Example 1: NewsletterPro™ Welcome Page –The “Dashboard”

The screenshot shows a web browser window displaying the NewsletterPro Dashboard. The browser's address bar shows the URL <http://www.newsletterproonline.com/newsletters/wp-admin/>. The dashboard page has a blue header with the title "MARKETING SYSTEM" and a navigation menu with items: "Dashboard", "Write", "View Newsletters", "Users", "User Guide", and "Options (for Dawn only)". The main content area is titled "Dashboard" and includes a "Welcome to the NewsletterPro Dashboard" section with a link to "Update your profile or change your password". Below this is a "NewsletterPro Marketing System documents:" section with a list of links to various documents. There is also a "NEW! Video Tutorial" section with a link to download a video tutorial. A "Referral Special" section offers a rebate for referring a trial member. A "NewsletterPro Premium Package" section describes an upgrade option. On the right side, there are two promotional boxes: "This Week's Certified Mortgage Advisor (CMA) Webinar:" with a notice that webinars will resume on June 8th, and "Previous Week's Webinar Downloads" with links to download PDFs and audio for "Overcoming Call Reluctance" and "Planning For Mortgage Advisors: Comparing Mortgages". At the bottom right, there is a "CMA Certification Form:" section with a link to download the form. The browser's taskbar at the bottom shows the time as 1:39 PM on 6/8/2011.

On the dashboard page you will find the link to personalize your Real Estate Report™ as well as links to all the marketing material assessable within the system. There will also be a link to register for upcoming Certified Mortgage Advisor™ webinars.

You will also find additional information and materials such as the previous week's webinar recording and slides, free subscriber downloads plus information on important options such as Co-branding. There are also instructions regarding sending the report via iContact which will also be applicable to most commercial email services.

2. How do I personalize my account?

On the Dashboard Screen (shown above) you will see a link to update your profile listed first. Click on this **Profile** link at the top of the page or the [Update your profile or change your password](#) link.

Profile

Example 2: Your Profile and Personal Options Page

Newsletter - Profile - Windows Internet Explorer
http://www.newsletterproonline.com/newsletters/wp-admin/profile.php

NEWSLETTERPRO™
MARKETING SYSTEM

Dashboard Write View Newsletters **Users** User Guide Options (for Dawn only)

Your Profile Users Company Logo Personal Photo Hello, Janet White My Account Log Out

Your Profile and Personal Options

About yourself

Username: (no editing)
janet@hershmangroup

First name:
Janet

Last name:
White

Enter your personal text here to be displayed (in addition to your contact and address information) in your personalized section of each newsletter:

Janet White
The Hershman Group/OriginationPro

Disclosure

Contact Info

E-mail: (required)
janet@hershmangroup.com

2nd E-mail: (can be the same as above; this is the "reply-to" email for unsubscribing)
janet@colorworkspromotions.com

Phone 1: (800) 581 - 5678

Phone 2: (240) 688 - 0534

Company: The Hershman Group/OriginationPro

Update Your Contact / Address block

This information is mandatory for CAN-SPAM email laws:

Address 1: 10441 Metropolitan Avenue

Address 2:

City: Kensington

State: MD

Zip: 20895

On this page, you can personalize your profile by creating your username, first name, last name, and nickname. **You should do this immediately upon receiving your login information the first time via email.** Your display name will be the nickname you have provided under the nickname box and will appear on each screen as a welcome salutation.

You also have an area where you can enter personal text to be displayed with your profile within the “personalization” section of your newsletter. Here you can provide any personal information that you feel might be helpful or useful to your target audience. If you would like your web address to appear on the newsletter, you should enter it here.

An area is provided where you can display your NMLS info. You may display your MLO# and Branch/Company ID by entering the information into the blanks—or as an alternative you can add this information in the disclosure section at the bottom.

There are three active calculator links that can appear on your newsletter. They are **Calculate a mortgage payment**, **Compare the cost of owning versus renting** and **Lower your payments through debt consolidation.** These are designed for informational purposes only and the info entered will not be shared. These calculators can be disabled by clicking on the drop-down menu arrow and selecting **none**.

There are several Disclosure Logos available. You may select from all of these choices by checking the boxes of those that you want to appear on your newsletter.

In this section you may change your password to one you would like to have as opposed to the random password assigned to you. We highly recommend you change this to one which you are likely to remember. To perform this option, you must type your new password once under **New Password** and again under **Type it one more time**.

Please make sure to click on the **Update Profile** tab at the bottom. This is the “save” button.

Note: In this section you **must** enter a valid email address. If you do not have a valid email address, you will not be able to operate NewsletterPro™.

Note: The username cannot be changed without losing the info in the profile. The username doesn't appear on the Report. If you would like the username changed, please contact us at 1-800-581-5678.

3. How do I add a Personal Photo or Logo?

If you click on the **Personal Photo or Company Logo** links, you can upload your person photo/company logo with the extension of **.jpg**, or **.jpeg** as long as they are no larger than 300 KB in size and no larger than 150 x 150 pixels.

Click on **Browse** to visit the site on your personal computer where you stored your picture. Find the picture/logo that you want to select as yours and click on the photo/logo to select it. Once you have completed that task, you can hit **Upload file** to upload the picture/logo.

Once you have completed this task, click on **Back to your profile** to get you back to your main screen.

Once you have completed the two sections, **Your Profile and Personal Photo/Company Logo**, and have filled out all vital information, press **Update Profile** to post your vitals. It is as simple as that.

*****Need help sizing your logos and photos? We will resize your logos and photos to accommodate the system. Please email the photo/logo to success@hershgroup.com.**

4. Can my web address appear on the Real Estate Report™?

Web addresses are not included in the personal profile because we have come across issues with the newsletters triggering spamming blockers. Larger companies have filters in place that will identify your emailed newsletter as spam if it includes a web address. You can enter your web address on the profile page within the personalized paragraph if you wish.

5. When/How will I receive the Real Estate Report™?

Every week you will receive the HTML email newsletter in your email inbox, personalized with whatever information you currently have in your personal profile (see instructions above on how to personalize.) You will forward this email to whatever email distribution list you own. Typically the email is sent out on Sunday or Monday with a Tuesday date.

If you receive the weekly newsletter and need to make a change in your profile, you can log into your account and make the necessary change/correction. Then to resend it to yourself, click on **View Newsletters** and then **Email this newsletter to me**.

Important Note: NewsletterPro™ subscribers that “spam” with the newsletter will have their NewsletterPro™ accounts terminated immediately.

6. How do I view the Weekly Real Estate Report™?

Click on the **View Newsletters** tab. Under **View Newsletters**, you have the option to **search** and **browse** for NewsletterPro™ editions current, past or present.

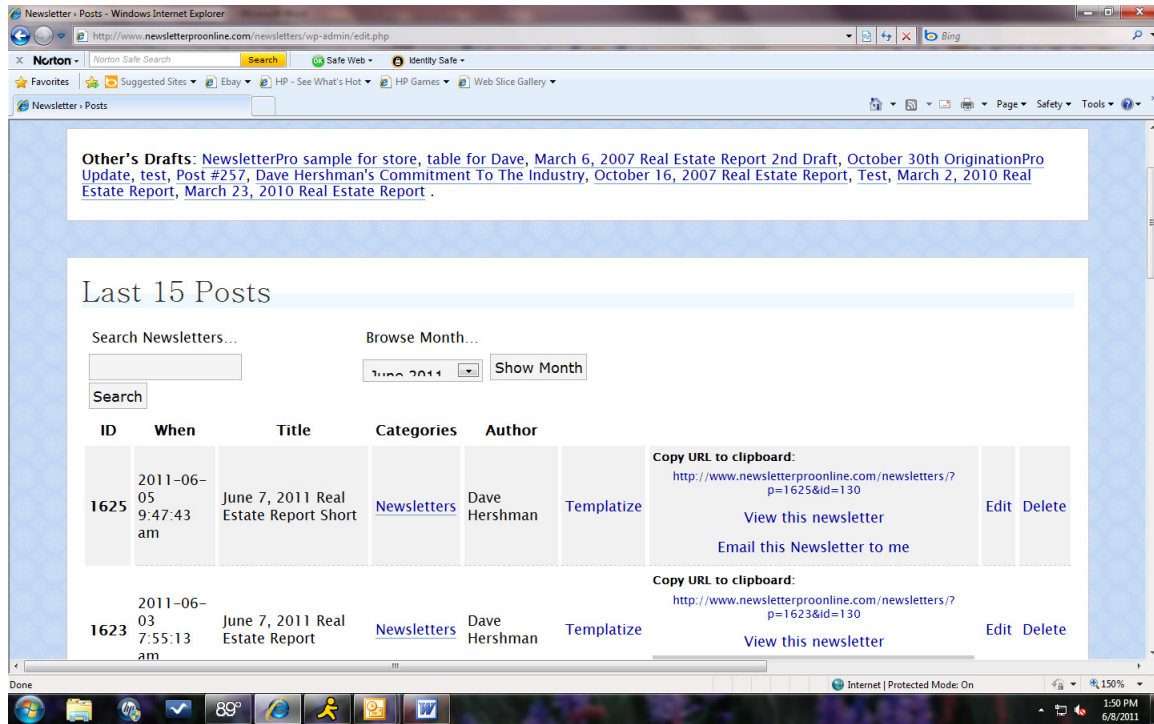
Viewing NewsletterPro™

If you click on the **Search Newsletters** box, you will have the ability to review each newsletter by categories that have been published in the past weeks. Click the **Search** option, and you will be able to review each letter.

Type a keyword or keywords into the **Search** box for the content of the newsletter you are searching for.

Example 3:

1. You the option to search for newsletters by month. If you click on the **Browse Month** drop down box arrow, you will get a drop down listing of past issues of your newsletter.
2. Click the arrow under the **Browse Month** section and a listing of all postings from October 2006 through the present month..
3. Highlight the month you want to see, i.e., July 2010 and then click on **Show Month**.
4. The July 2010 newsletter will appear.
5. *Note: The drop down menu may contain posts that are only available to the site administrators.



7. What are Back Pages?

Back Pages – Our back pages enable you to include information and marketing material on the back of your newsletter or can convert the newsletter into a self-contained mailer by printing a newsletter page on the blank side. There are several back page alternatives posted both in legal and regular size to accommodate the newsletter pages. The publisher version can be completely personalized/customized. The PDF version can be personalized by adding your personal information in the text boxes provided. Distribution can be applied via mail, fax or in person.

To print a newsletter page onto the back-page, simply print the back page of your choice, then place the back page back into the printer, text up, with the top of the page to the back of the printer. Once printed, the page is now ready to be folded, addressed and distributed.

8. What is the purpose of the Start-Up Pages?

Start-Up Pages are documents provided to help you begin to market yourself using the NewsletterPro™ Marketing System. They may contain information on how to use the system or as an announcement for you to distribute to let others know that you have this service

9. How do I use the Flyers and Letters?

Flyers and Letters – Throughout the year, a variety of flyers/emails, letters, postcards, forms and more will be posted along with the newsletter pages that will be targeted to the substance of the written material of the newsletters or articles. For example, if we have a written article on improving your credit score, there may be a flyer or letter posted to advertise the fact that your company will help those with credit challenges. The flyers and letters aim to entice others to call

you to receive a free copy of an article that may help those with blemished credit histories. Response mechanisms work.

10. Do I send out all of the pages to each of my contacts each month, or are they targeted toward different audiences?

The Sales Update™ – The ultimate tool for all of your business targets: Realtors, title companies, insurance agents, financial planners, CPAs and more. The Sales Update is designed to teach all sales personnel and business owners how to increase their production through advanced marketing and sales techniques.

The Real Estate Page™ – Articles that help all homeowners and prospects understand how to make the most of their most important economic investment – their home. Jointly mail these articles with Realtors and financial planners to their sphere. You will be providing value to synergy partners as well as directly to consumers while presenting yourself as an expert.

Real Estate Trends™/Update™/Report™ – These newsletters are designed to deliver quick, concise professional news to keep real estate professionals, prospects and previous customers informed as to the status of their most important investment. The articles cover and explain the state of the economy and housing, news on mortgage programs, interest rate trends, government activity and how these may affect their investments and business.

11. Can I personalize these pages as well?

Yes, the newsletter files are posted to the site in two formats:

A. Publisher Files

If you have Publisher 2000 or greater, the newsletter Publisher files can be completely customized. You can add or delete text within the body of the newsletter, add your own graphics; change the font type and color. The text box on the bottom right hand side of the page is for your contact information. You can type it into the text box or photocopy your business card. Once you have customized a page, you may want to convert it to a PDF file as most of your recipients will have Acrobat Reader on their computers. If you send a Publisher file, your recipient will not be able to view it unless they have Microsoft Publisher. ***Please see the instructions below on How To convert a Publisher file to a PDF file.**

B. PDF Files

The PDF files are available for those who are not comfortable using Microsoft Publisher or who don't want to customize the newsletter pages. This is a simplified version of the newsletter pages that allows for personal information to be entered into the text box on the bottom right without the use of Microsoft Publisher. Information such as that listed below can be entered into the personalization area(s) that have been setup on each document (please note that some pages have more than the box on the bottom right side that can be personalized):

Sally Smith
Senior Loan Officer
USA Mortgage Company
Mortgagetown, MD 11111
301-222-2222
www.usamtg.com

Important Note: You are not restricted as to the format of these newsletters. You can change the format or even extract the text and post on your blog or website.

*To convert a file to a PDF file, you can download a free program called CutePDF Writer. Go to <http://www.cutepdf.com> and follow the directions to download the program. To use CutePDF Writer, open a newsletter publisher file, select **file** and then **print** making sure to select CutePDF as your printer. The file **will not print**.....you will be asked where you want to **save** the file. The file will save as a PDF file.

12. How do I distribute the newsletters?

Once you have personalized/customized the pages to your liking, you can print and mail or email the Real Estate Page™, The Sales Update™, The Trends™ and the Real Estate Update™. They also can be emailed as an attachment, or you can publish the files to the Web.

There are instructions on the dashboard page on how to email the HTML Real Estate Report™ via iContact or if your list is smaller, you can send via your own email program such as Outlook.

For those of you who have higher versions of Publisher, you have the option to post on a web site or email the Publisher file directly from Publisher as the body of an email. To email as an HTML you/your company must have its own server.

Publish files to the Web:

You can publish a Web site to a **Web server**, a network server, a File Transfer Protocol (FTP) server, or to a folder on your own computer.

Publish a Web site to a location on the Internet or on a network

To publish your Web site on the World Wide Web (WWW), you must subscribe to a Web hosting service. A Web hosting service provides Internet access and storage space on Web servers. Before you publish your Web site, contact your **Internet service provider (ISP)** or system administrator to get the information that you need to publish and the **Uniform Resource Locator (URL)** of the Web site where you can save files.

On the File menu, click **Publish to the Web**.

In the File name box in the Publish to the Web dialog box, type the URL of the Web or network server where you want to save your Web site — for example, <http://www.northwindtraders.com> — and then click **Save**.

If prompted, type your user name and password, and then click **OK**.

The directory associated with your URL will appear in the Publish to the Web dialog box.

Double-click the folder where you want to save your Web site.

In the File name box, select **index** as the default name for your home page, and then click **Save**.

When prompted, click **OK**.

Publish a Web site using FTP

Before following this procedure, contact your Internet service provider or system administrator to get the information that you need to publish to an **FTP** site. You also have to create an FTP site in FTP Locations.

 How?

On the File menu, click **Publish to the Web**.

In the Save in box, click **FTP Locations**.

Double-click, **Add/Modify FTP Locations**.

Enter the information you received from your Internet service provider, and then click **OK**.

Click **Cancel**.

On the File menu, click **Publish to the Web**.

In the Save in box, click **FTP Locations**.

In the list of FTP sites, double-click the site you want, and then double-click the folder where you want to publish your Web site.

NOTE If your Internet service provider (ISP) requires you to use a specific program to upload your Web site, or if you are publishing your Web site to a corporate intranet, you may need to save a version of your Web site in a specific HTML file format and follow a different procedure to publish your Web site. Ask your ISP or your system administrator for information about how to save and publish your Web site.

How to Email as an Attachment:

Once you have the document you would like to email open in Publisher:

- Go to **File** and select **Send Email**. (Some versions offer options once you select this while others just bring up the email.) If you are given options, you will want to select **Send As Message**. Then simply enter the email address for those that you would like to distribute the newsletters to and send.
- Some versions of Publisher also have the email option on the menu bar running across the top of the screen. You will see an icon next to the print or save button that looks like a letter and an envelope. Click on this button and it will bring up the same feature listed above.

13. What if I forget my password?

If you forget your password, there is a Forgot Your Password link on the login page. Click on this link and your login information will be emailed to the address in your account.

Conclusion:

Once you have personalized your NewsletterPro™ settings, you are ready to go. Now you can review past and present versions of the marketing materials and send personalized Real Estate Report™ versions via email to your own personal distribution list so you can keep your targeted audience on top of the latest information and news. Welcome again to NewsletterPro™ and we look forward to working with you in the future!

~The Hershman Group and the OriginationPro Team