



Getting Started -- Section 1

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Introduction

As a new user to the Broker Brain system, the first thing that you will want to do is to customize the very basics of **your** system to meet the needs of your firm. You will find that because this system was designed with the input of experienced REO brokers, its off the shelf set up may not need much tweaking. However, because different users have different tastes, nearly everything in Broker Brain can be customized. This process begins from the Admin Tab as shown below:



Clicking on the Admin Tab will provide the following options. Each will allow you to customize your site to your specifications:

Users	-- Allows you to add new users and update existing users
Groups	-- Allows you to add new work groups as well as customize default groups
Auto Tasks	-- Allows you to customize automatic tasks based on groups and property status
Property Status	-- Lists the default property statuses and allows you to add more
Repair Status	-- Lists the default repair statuses and allows you to add more
Offer Status	-- Lists the default offer statuses and allows you to add more
Contract Status	-- Lists the default contract statuses and allows you to add more
Owners	-- Allows you to create the owner list for all of your properties as well as assign the owner rep
Markets	-- Allows you create the Markets in which you have properties
Vendors	-- Allows you to set up the various vendors who do work for you
Utilities	-- Allows you to create a list of all of the utility companies that service your properties
Flags	-- Allows you to create flag descriptions that you can attach to your properties
Site Settings	-- Allows you to customize the look and feel of your Broker Brain site
Import	-- Allows you to import property addresses into the system in bulk.
Maintenance	-- Allows you to export your data for backup and other maintenance functions.

Let's take a look at each of these in more detail.

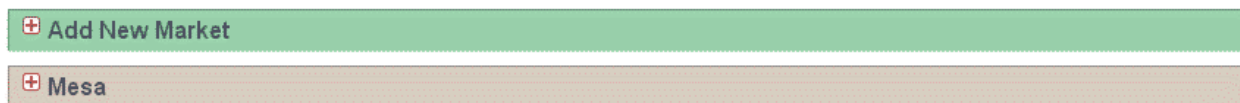
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1.1 Markets

Creating the list of Markets in which your company has properties is very simple. This is one of the first things that should be done upon activation of your website. The Market in which your property is located drives the set up of many of the other features in this system. This is done from the Markets tab.

1.1.1 Adding Markets

1. Click on the Markets tab on the left hand side of the screen and the following options will appear:



The screenshot shows a list of market options. The first option is 'Add New Market' with a plus sign icon, highlighted in a light green bar. The second option is 'Mesa' with a plus sign icon, highlighted in a light brown bar.

2. Click on the + next to Add New Market.



The screenshot shows the 'Add New Market' form. It has a title bar with a minus sign and the text 'Add New Market'. Below the title bar are two input fields: 'Market' and 'State'. The 'Market' field is a text box with the label 'Market' and a 'Required field.' message below it. The 'State' field is a dropdown menu with the label 'State' and a 'Required field.' message below it. At the bottom of the form is a green 'ADD' button.

3. Fill in the Market name, select the State, and click Add. Your new market will appear as in the screen shot above.

Important:

- Once a Market is added it cannot be deleted from the system. It can be renamed, however by simply clicking on the + next to the desired market and updating the information.

Upon activation of your website, one market will already be created. This is based on the city information that you provided when you registered.

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1.2 Groups

Upon initial setup, your Broker Brain website is configured with the following default groups:

- Admin Team
- Property Preservation Team
- Property Open/Close Team
- MLS Team
- HOA Team
- BPO Team
- Closing Team
- Offer Negotiation Team
- Contract Team

New groups can be created and existing groups can be modified to meet the needs of your company.

1.2.1 Creating a New Group

1. Click on the Groups tab on the left hand side of your screen. The following options will appear:



2. Click on the + next to Add New Group. The following screen will appear:

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+ Add New Group

Name

Required field.

Market

Type

Users

bob jones

David Jones

Greg Nelson

bill williams

Privileges

<input type="checkbox"/> Admin	<input type="checkbox"/> Reports	<input type="checkbox"/> Properties	<input type="checkbox"/> Notes Power User
<input type="checkbox"/> Admin Users	<input type="checkbox"/> Property Reports	<input type="checkbox"/> Property Financials	<input type="checkbox"/> Tasks Power User
<input type="checkbox"/> Admin Groups	<input type="checkbox"/> Task Reports	<input type="checkbox"/> Property Repair Power User	<input type="checkbox"/> Web Sites
<input type="checkbox"/> Admin Agents	<input type="checkbox"/> Repair Reports	<input type="checkbox"/> Property HOA Power User	
<input type="checkbox"/> Admin Site	<input type="checkbox"/> Offer Reports	<input type="checkbox"/> Property BPO Power User	
<input type="checkbox"/> Admin Owners	<input type="checkbox"/> HOA Reports	<input type="checkbox"/> Property Forms Power User	
<input type="checkbox"/> Admin Markets	<input type="checkbox"/> Inspection Reports	<input type="checkbox"/> Property Owners Power User	
<input type="checkbox"/> Admin Auto Tasks	<input type="checkbox"/> Flag Reports	<input type="checkbox"/> Property Agents Power User	
<input type="checkbox"/> Admin Vendors	<input type="checkbox"/> Financial Reports	<input type="checkbox"/> Property Assign Agents Power User	
<input type="checkbox"/> Admin Utilities			
<input type="checkbox"/> Admin Property Status			
<input type="checkbox"/> Admin Repair Status			
<input type="checkbox"/> Admin Offer Status			
<input type="checkbox"/> Admin Contract Status			
<input type="checkbox"/> Admin Flags			
<input type="checkbox"/> Admin Import			
<input type="checkbox"/> Admin Maintenance			

3. Choose a name for the group
4. Select the market for that group. **(Each group can belong to only one market)**
5. Choose the Users that you would like to belong to that group. **(If you haven't created users at this point, you can also add users to a Group during the User setup process.)**
6. Select all of the privileges that will be allowed for this group by placing a check mark next to the privilege
7. Click on ADD to complete the update. The new group will appear in the appropriate location

1.2.2 Updating an Existing Group

Updating groups is essentially the same process as adding a new group. Simply click on the + sign next to the group name that you want to update and follow the steps as outlined in Creating a New Group.



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Important:

- When creating or updating groups the first privilege in each column serves as a trigger for those below. **Example:** If all of the Admin privileges in the column are checked, except for the first one, this group will not have access to the Admin Tab. This applies to the Reports and Properties as well.
- If a user is in more than one group with different privileges, they will have the combined privileges of each of the groups.
- If you have created new Markets, you will need to create new groups for those markets. You may want to duplicate those created for the original market. It is recommended that you include the name of the selected Market in the new group. Example: **HOA Team – Phoenix Market**. This will become important when creating Auto Tasks.
- If the Web Sites box is unchecked, users in that group will not see the Web Sites Tab at the top of your Broker Brain site.
- If you have restricted property access to only the Agents assigned to a property (***This is discussed in the Site Settings section in this document***), you may at some point want to give one user access to another agent's properties. To do this you will want to create a new group, using the steps indicated in the previous pages. In addition, select the name of the agent, whose properties you want to share, from the Type drop down menu. Be sure to give the appropriate privileges to the group. Any users that you select to be in this group will now have access to all properties of this agent.

Power Users

When creating groups you have the ability to select privileges that make the users in those groups Power Users. There are four types of Power Users that can be selected when creating a group. They are listed below, along with the specific capabilities that each has.

- **Property Repair Power User** – Only this power user can delete repairs.
- **Property HOA Power User** – Only this power user can delete an HOA.
- **Property BPO Power User** – Only this power user can delete a BPO and change submitted BPO's to pending.
- **Property Owners Power User** – Only this power user can view the property owner rep in the Property > Main tab or in the Property reports.
- **Tasks Power User** – Only this power user can delete tasks and complete tasks for any user.
- **Notes Power User** – Only this power user can delete notes.
- **Property Forms Power User** – Only this power user can delete forms.
- **Property Agents Power User** – This power user option gives the user the ability to access all properties whether they are assigned to an agent or not. This is only necessary if the system is set to restrict property access. (***This is discussed in the Site Settings section in this document***).



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- **Property Assign Agents Power User** – This power user has the same privileges as the Property Agents Power User. In addition, **only** this power user has the ability to assign an agent to a property whether or not the system is set to restrict property access.

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1.3 Users

1.3.1 Creating New Users

1. Click on the Users tab on the left hand side. The following options will appear:

<input type="checkbox"/> Add New User
<input type="checkbox"/> jones, bob
<input type="checkbox"/> Nelson, Greg

2. Click on the + next to Add New User and the below fields will become visible:

+ Add New User		
First Name <input type="text"/> Required field.	Last Name <input type="text"/> Required field.	Email <input type="text"/> Required field.
Username <input type="text"/> Required field.	Initial Password <input type="text"/> Required field.	<input type="checkbox"/> Super User <input type="checkbox"/> Agent <input type="checkbox"/> Field Inspector <input type="checkbox"/> Revoke Privileges
Field Inspector Region <input type="text"/> Comma separated list of zipcodes		
Agent License Number <input type="text"/>	Agent License Expiration Date <input type="text"/> 	
Comments <input type="text"/>		
Groups <input type="checkbox"/> Admin Team - Mesa <input type="checkbox"/> BPO Team - Mesa <input type="checkbox"/> Closing Team - Mesa <input type="checkbox"/> Contract Team - Mesa <input type="checkbox"/> HOA Team - Mesa <input type="checkbox"/> HOA Team - Phoenix <input type="checkbox"/> MLS Team - Mesa <input type="checkbox"/> Offer Negotiation Team - Mesa <input type="checkbox"/> Property Open/Close Team - Mesa <input type="checkbox"/> Property Preservation Team - Mesa <input type="checkbox"/> Test Team - Phoenix		
<input type="button" value="ADD"/>		

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3. Complete all of the required fields as well as place a ✓ next to the group or groups to which you want this user assigned.

Important:

- Once a user is added, they cannot be deleted. They can, however, be denied access by updating their profile with a ✓ in the Revoke Privileges box.
 - It is advisable that the user change the password that they are assigned when logging in for the first time. This can be done from the **My Account** tab, and is discussed in another section.
 - Users can be added to more than one group, if desired.
 - Any users set up as Super Users have the ability to see all Markets while operating in the various sections in the Admin Tab regardless of the market selected. They also have access to all markets in the system regardless of the groups they are assigned to and their permissions are merged across markets. Super User privileges basically remove market permission restrictions. Users that are not Super Users have market specific permissions based on the groups they are assigned to on a market-by-market basis. The first user created when the account is open is always a Super User and that user is the only one that can create another Super User. If you set up a user as a Super User, make sure that they have admin privileges.
 - If you place a ✓ in the Agent box, this user will be available to have properties assigned to them. (See the Adding a New Property document or Editing an Existing Document) Complete the Agent License Number and Expiration Date fields when setting up an agent.
4. Once you have completed all of the information, simply click **Add**. The user name will appear as in the screenshot on the previous page.

1.3.2 Updating Users

Updating users is essentially the same process as adding a new user. Simply click on the + sign next to the name of the user that you want to update and follow the steps as outlined in Creating a New User.

Field Inspectors

When you are creating a user you have the ability to set them up as a Field Inspector. As you can see on the screen shot on the previous page, there is a box that can be checked if this user is an inspector. In addition, there is a field available, for you to input the zip codes for which they are responsible. Simply enter the zip codes separated by a comma. If you have any properties loaded into the system, that are in a zip code that has no field inspector assigned to it, the following change in the User Screen will appear:

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The following zip codes do not have inspectors assigned to them:
85215

+ Add New User
+ jones, bob
+ Jones, David
+ Nelson, Greg
+ williams, bill

Notice at the top of the screen that the system lets you know which zip codes are currently not assigned a field inspector. In the case above, only one zip code that has properties in it has not been assigned an inspector. This allows you to make personnel adjustments as needed.

Important:

- In the reports tab, you have the ability to run an inspection report. This report will list the properties that an inspector is responsible for and group them by zip code. In order for this report to be accurate, you need to make sure that you include all of the zip codes that an inspector is responsible for in the appropriate field in the Users screen

Note:

Creating and generating reports is discussed in another section.



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1.4 Auto Tasks

Your Broker Brain system comes standard with several automatic tasks already created. These are tasks that are triggered automatically as a property is moved from one status to another. Whether or not an auto task is generated can also be dependent upon various conditions within each property. Does it have a pool or spa? Is it in an HOA? And more. These automatic tasks are assigned to specific groups depending upon the task.

There are 3 types of Auto Tasks. They are:

Task – This type of task requires an action to be performed on a property and must be shown as complete once the task owner completes it

Email Notification – This type of task simply involves the automatic email notification of a party or parties when it is triggered. There is no additional action required and the task is generated in the subject Property's Tasks page and automatically shown as complete

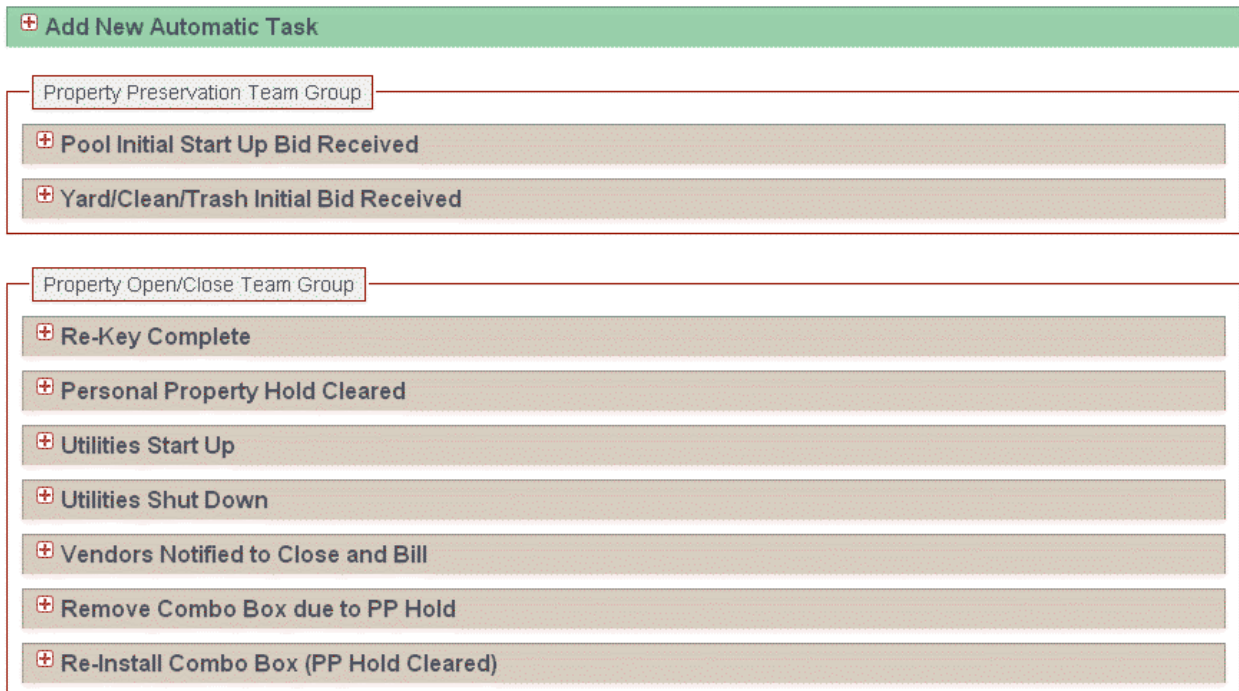
Task & Email Notification -- This type of task requires an action to be performed on a property, and also sends an automatic email notification. This task must be shown as complete by the task owner, once the physical task is finished.

When you create an Auto Task for the first time, you will not have the option to create it as an Email Notification or Task & Email Notification. This must be done when updating an Auto Task.

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1.4.1 Creating a new Auto Task

1. Click on the Auto Tasks tab on the left hand side of the screen. The following options will appear:



The screenshot displays the 'Add New Automatic Task' interface. At the top, there is a green header bar with a plus icon and the text 'Add New Automatic Task'. Below this, there are two main sections, each enclosed in a red border. The first section is titled 'Property Preservation Team Group' and contains two task items: 'Pool Initial Start Up Bid Received' and 'Yard/Clean/Trash Initial Bid Received'. The second section is titled 'Property Open/Close Team Group' and contains seven task items: 'Re-Key Complete', 'Personal Property Hold Cleared', 'Utilities Start Up', 'Utilities Shut Down', 'Vendors Notified to Close and Bill', 'Remove Combo Box due to PP Hold', and 'Re-Install Combo Box (PP Hold Cleared)'. Each task item is represented by a light brown bar with a plus icon on the left side.

Note: In addition to the Add New Automatic Task option, the screenshot above shows some of the standard auto tasks. Notice that all tasks are listed together according to the group that the task is assigned to.

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2. Click on the + next to Add New Automatic Task. The following screen will appear:

Add New Automatic Task

Task

Required field.

Days to Complete

Required field.

Status Trigger
Required field.
 Initial
 Eviction
 Personal Property Hold
 Not Listed
 Listed
 Under Contract
 Closed

Conditions
 If Has HOA
 If Has Pool
 If Has Spa
 If owner =
 If Previous Status =
 If Has Flag =
 If Zipcode =
Comma separated list of zipcodes

Group Assigned

Required field.

3. Complete all of the required fields and select the group to which this task should automatically be assigned. **(Auto Tasks can be assigned to only one group)**
4. Click Add and the new task will be created.

1.4.2 Updating an existing Auto Task

Updating an Auto Task is essentially the same process as adding a new group. Simply click on the + sign next to the Auto Task that you want to update and follow the steps as outlined in Creating a New Auto Task.

Important:

- You may have certain tasks that need to be repeated at various stages of the process. Because of that, you can assign auto tasks to multiple property statuses
- The “If owner” condition refers to the bank that currently owns a specific property. Creating your Owners list will be discussed in another section.
- The “If Has Flag” condition refers to any flags that might be attached to a specific property. Creating Flags and Flag Types will be discussed in another section

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- The If Zip Code condition allows you to create an Auto Task for only properties within a certain zip code or codes. Simply fill in the desired zip codes separated by a comma.
- The Auto Tasks that come standard with the system apply **only** to the original groups in the original market. If you have added new markets and new groups within those markets, the existing Auto Tasks will not generate for properties in those markets. If you want the same Auto Tasks to generate for properties in these new markets, you will need to assign duplicate Auto Tasks to the desired groups in those Markets.

1.4.3 Changing an Auto Task to Email Notification

To change an Auto Task to an Email Notification, click the + next to the existing task that you want to change while in the Auto Tasks page. A partial screen shot of what will appear is below:

Notify	
Task <input type="text" value="Notify"/> <small>Required field.</small>	Type <input type="text" value="Task"/>
Days to Complete <input type="text" value="10"/> <small>Required field.</small>	
Status Trigger <small>Required field.</small> <input type="checkbox"/> Initial <input type="checkbox"/> Eviction <input type="checkbox"/> Personal Property Hold	

1. Click on the Type drop down menu and select Email Notification. The following change will appear just below the menu:

Notify	
Task <input type="text" value="Notify"/> <small>Required field.</small>	Type <input type="text" value="Email Notification"/> <input type="button" value="EDIT"/>

2. Click on Edit and the screen on the next page will appear:

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Email Notification ✕

To: <input style="width: 95%;" type="text"/> Comma Separated Addresses	Macros <div style="border: 1px solid gray; padding: 5px;"> %combo_box_code% %combo_box_location% %escrow_contact% %escrow_email% %eviction_attorney% %eviction_attorney_email% %eviction_coord% %eviction_coord_email% %key_number% %loan_number% %mls_number% %owner_rep% %owner_rep_email% %property% %realtor_lockbox_code% %realtor_lockbox_location% %reo_number% %servicer_contact% %servicer_email% %task% </div> <div style="text-align: left; margin-top: 5px;"> <input type="button" value="<<"/> </div>
CC: <input style="width: 95%;" type="text"/> Comma Separated Addresses	
BCC: <input style="width: 95%;" type="text"/> Comma Separated Addresses	
From: <input style="width: 95%;" type="text"/>	
Subject: <input style="width: 95%;" type="text"/>	
Message: <div style="border: 1px solid gray; height: 60px; width: 95%;"></div>	
<input type="button" value="SUBMIT"/> <input type="button" value="TEST MAIL"/>	

Important:

- It is important to remember that Auto Tasks are not property specific. Because of that, the information that you populate into the above screen must be generic. It is a template specific to the task but not to the property. To allow you to do this the Macro section provides a list of choices with which you may choose to populate the various fields.
- Macros ending in the word email should be placed into the fields appropriate for email addresses (To:, CC:, BCC:, etc.). For instance, if the task that you are creating is for an email to be sent to the eviction attorney, you would place your cursor in the To: field and double click on the %eviction_attorney_email% macro. When this task is triggered for a property, the To: field will be populated with the email address for the eviction attorney listed in the system for that property.

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- Other macros should generally be used in the Subject or Message of the email. Each macro will pull the stated information from the property that triggered the task and replace it with that information. For instance, if somewhere in the message of the email, you place the %combo_box_code% macro, the system will replace it with the actual combo box code for the property.
 - Macros can be moved more than one at a time into the various fields if desired. By holding the shift key down you select a continuous range of macros to be moved into a field. By holding the Ctrl key down, you can select multiple separate macros. Once you have highlighted all of those that you want, simply click on the arrow and they will move into the field in which your cursor is located.
 - If you use macros in various locations within the message of the email, be sure to put a space as you would with any new word in a sentence. The first character of the information created by the macro will appear in the same position that the percentage sign appears.
 - The From: field should be populated with whatever email address you want the recipient to see as the sender for this type of email.
 - If you want to see what the message and subject of the email will look like, you can send a Test Mail. The message will only be sent to the email address of the logged in person, but the Subject and Message fields will appear just as they will when the actual task is triggered and the email sent.
- 3, Once you have created the email template to your liking, click on Submit. This will return you to the previous screen
 4. Click Update at the bottom of the Auto Task once you have made all of the desired changes to the task. If you do not Update, the task will not become an Email Notification task.

Creating a Task & Email Notification Auto Task follows the same process with the exception of the selection made from the Type drop down menu. As noted on a previous page, this task will generate an automatic email as well as a physical task that will need to be completed.

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1.4.4 Completing an Email Notification Auto Task

As noted earlier, the system will automatically send the email and show the task as complete when an email notification task is triggered for a property. A record of that task is located in the Properties > Tasks tab for the subject property in the Completed Tasks section. By clicking on the + next to the specific task the following screen will appear:


 **Notify**

Due: 01/17/2009
Completed at 9:10:35 PM on 01-07-2009 by Greg Nelson

Email Notification:

--Sent by System at 9:10:35 PM on 01-07-2009--
To: <>
From: <>
cc: <d.jones@cox.net>
bcc:
Subject: Notification
Message:

Notes:

 New Note

It simply shows all of the information that was included in the template when the task was created.

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1.5 Property Status

Upon activation each Broker Brain site is set up with 7 standard property statuses. They are:

Initial
Not Listed
Closed

Eviction
Listed

Personal Property Hold
Under Contract

Additional property statuses can be created depending on need and preference.

1.5.1 Adding a New Property Status

1. Click on the Property Status tab on the left hand side of the screen. The following screen will appear:

Add New Status

Status <input style="width: 90%;" type="text"/> <small>Required field.</small>	Weight -20 <input type="button" value="v"/>
<input type="button" value="ADD"/>	

Status List			
<input style="width: 90%;" type="text" value="Initial"/>	Weight: -10 <input type="button" value="v"/>	<input type="checkbox"/> Public <input type="checkbox"/> Archival	<input type="button" value="UPDATE"/>
<input style="width: 90%;" type="text" value="Eviction"/>	Weight: -9 <input type="button" value="v"/>	<input type="checkbox"/> Public <input type="checkbox"/> Archival	<input type="button" value="UPDATE"/>
<input style="width: 90%;" type="text" value="Personal Property Hold"/>	Weight: -8 <input type="button" value="v"/>	<input type="checkbox"/> Public <input type="checkbox"/> Archival	<input type="button" value="UPDATE"/>
<input style="width: 90%;" type="text" value="Not Listed"/>	Weight: -7 <input type="button" value="v"/>	<input type="checkbox"/> Public <input type="checkbox"/> Archival	<input type="button" value="UPDATE"/>
<input style="width: 90%;" type="text" value="Listed"/>	Weight: -6 <input type="button" value="v"/>	<input type="checkbox"/> Public <input type="checkbox"/> Archival	<input type="button" value="UPDATE"/>
<input style="width: 90%;" type="text" value="Under Contract"/>	Weight: -4 <input type="button" value="v"/>	<input type="checkbox"/> Public <input type="checkbox"/> Archival	<input type="button" value="UPDATE"/>
<input style="width: 90%;" type="text" value="Closed"/>	Weight: -2 <input type="button" value="v"/>	<input type="checkbox"/> Public <input checked="" type="checkbox"/> Archival	<input type="button" value="UPDATE"/>

2. Simply fill in the Status field and select the weight,
3. Click Add and the new Status will be added to the Status List



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Status Options:

Archival - The archival option allows you to set which statuses will not count towards your price plan quota. Any property in an archival status will have very limited editing capabilities. If you are currently at your price plan quota, the system will not allow you to remove any properties from an Archival status. **(Notice that the Closed status is defaulted with the Archival option. This can be changed, if desired.)**

Public - Any status marked public will show properties in those statuses on your public website at <http://yourdomain.brokerbrain.net/public>

Weight - The status weight is used to determine the order of the property statuses on the Property Page. The status with the smallest number will appear highest on the list.

Important:

- The 7 standard property statuses will show on the list with a light font color and cannot be deleted or renamed.
- Statuses that you create can be deleted only if there are no properties currently in that status.

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1.6 Repair Status

Upon activation, each Broker Brain site is set up with 9 standard repair statuses. They are:

Out for Bid	Second Bid Requested	Bids Received
Out for Approval	Approved	Work Complete
Owner Billed	Payment Received	Cancelled

Additional repair statuses can be created depending upon need and preference

1.6.1 Adding a New Repair Status

1. Click on the Repair Status tab on the left hand side of the screen. The following screen will appear:

Add New Status

Status <input style="width: 95%;" type="text"/> <small>Required field.</small>	Weight -20 <small>▼</small>
<input style="background-color: #4CAF50; color: white; padding: 5px 15px;" type="button" value="ADD"/>	

Status List	
<input style="width: 80%;" type="text" value="Out for Bid"/>	Weight: -19 <small>▼</small> <input style="background-color: #4CAF50; color: white; padding: 2px 5px;" type="button" value="UPDATE"/>
<input style="width: 80%;" type="text" value="Second Bid Requested"/>	Weight: -17 <small>▼</small> <input style="background-color: #4CAF50; color: white; padding: 2px 5px;" type="button" value="UPDATE"/>
<input style="width: 80%;" type="text" value="Bids Received"/>	Weight: -15 <small>▼</small> <input style="background-color: #4CAF50; color: white; padding: 2px 5px;" type="button" value="UPDATE"/>
<input style="width: 80%;" type="text" value="Out for Approval"/>	Weight: -13 <small>▼</small> <input style="background-color: #4CAF50; color: white; padding: 2px 5px;" type="button" value="UPDATE"/>
<input style="width: 80%;" type="text" value="Approved"/>	Weight: -11 <small>▼</small> <input style="background-color: #4CAF50; color: white; padding: 2px 5px;" type="button" value="UPDATE"/>
<input style="width: 80%;" type="text" value="Work Complete"/>	Weight: -7 <small>▼</small> <input style="background-color: #4CAF50; color: white; padding: 2px 5px;" type="button" value="UPDATE"/>
<input style="width: 80%;" type="text" value="Owner Billed"/>	Weight: -1 <small>▼</small> <input style="background-color: #4CAF50; color: white; padding: 2px 5px;" type="button" value="UPDATE"/>
<input style="width: 80%;" type="text" value="Payment Received"/>	Weight: 1 <small>▼</small> <input style="background-color: #4CAF50; color: white; padding: 2px 5px;" type="button" value="UPDATE"/>
<input style="width: 80%;" type="text" value="Cancelled"/>	Weight: 19 <small>▼</small> <input style="background-color: #4CAF50; color: white; padding: 2px 5px;" type="button" value="UPDATE"/>

2. Simply fill in the Status field and select the weight.
3. Click Add and the new Status will be added to the Status List.

Important:

- The 9 standard repair statuses will show on the list with a light font color and cannot be deleted. Those repair statuses that you add, **can** be deleted.
- The status weight is used to determine the order of the repair statuses in menus where they can be selected in the Properties > Preservation Tab. The status with the smallest number will appear highest on the list.

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1.7 Offer Status

Upon activation of your Broker Brain account is set up with eight standard offer statuses. They are:

Received	Ready to be Entered	Presented to Seller
Seller Countered Buyer	Buyer Countered Seller	Accepted
Rejected	Withdrawn	

Additional offer Statuses can be created depending upon need and preference.

1.7.1 Adding a New Offer Status

1. Click on the Offer Status tab on the left hand side of the screen. The following screen will appear

Add New Status

Status <input style="width: 95%;" type="text"/> <small>Required field.</small>	Weight <input style="width: 95%;" type="text" value="-20"/>
<input style="background-color: #4caf50; color: white; padding: 5px 15px; border: none;" type="button" value="ADD"/>	

Status List

<input style="width: 95%;" type="text" value="Received"/>	Weight: <input style="width: 40px;" type="text" value="-10"/>	<input style="background-color: #4caf50; color: white; padding: 2px 5px; border: none;" type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Ready to be Entered"/>	Weight: <input style="width: 40px;" type="text" value="-7"/>	<input style="background-color: #4caf50; color: white; padding: 2px 5px; border: none;" type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Presented to Seller"/>	Weight: <input style="width: 40px;" type="text" value="-4"/>	<input style="background-color: #4caf50; color: white; padding: 2px 5px; border: none;" type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Seller Countered Buyer"/>	Weight: <input style="width: 40px;" type="text" value="-1"/>	<input style="background-color: #4caf50; color: white; padding: 2px 5px; border: none;" type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Buyer Countered Seller"/>	Weight: <input style="width: 40px;" type="text" value="2"/>	<input style="background-color: #4caf50; color: white; padding: 2px 5px; border: none;" type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Accepted"/>	Weight: <input style="width: 40px;" type="text" value="5"/>	<input style="background-color: #4caf50; color: white; padding: 2px 5px; border: none;" type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Rejected"/>	Weight: <input style="width: 40px;" type="text" value="8"/>	<input style="background-color: #4caf50; color: white; padding: 2px 5px; border: none;" type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Withdrawn"/>	Weight: <input style="width: 40px;" type="text" value="11"/>	<input style="background-color: #4caf50; color: white; padding: 2px 5px; border: none;" type="button" value="UPDATE"/>

2. Simply fill in the Status field and select the weight.
3. Click Add and the new Status will be added to the Status List.

Important:

- The 8 standard offer statuses will show on the list with a light font color and cannot be deleted. Those offer statuses that you add, **can** be deleted.
- The status weight is used to determine the order of the offer statuses in menus where they can be selected in the Properties > Offers Tab. The status with the smallest number will appear highest on the list

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1.8 Contract Status

Upon activation of your Broker Brain account is set up with eight standard contract statuses. They are:

Draw Contract
Back from Buyer
Complete

Out to Buyer
Out to Seller
Cancelled

Partial Back from Buyer
Back from Seller

Additional Contract Statuses can be created depending upon need and preference.

1.8.1 Adding a New Contract Status

1. Click on the Contract Status tab on the left hand side of the screen. The following screen will appear

Add New Status

Status <input style="width: 95%;" type="text"/> <small>Required field.</small>	Weight <input style="width: 95%;" type="text" value="-20"/>
<input type="button" value="ADD"/>	

Status List	
<input style="width: 95%;" type="text" value="Draw Contract"/>	Weight: <input style="width: 40px;" type="text" value="-10"/> <input type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Out to Buyer"/>	Weight: <input style="width: 40px;" type="text" value="-7"/> <input type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Partial Back from Buyer"/>	Weight: <input style="width: 40px;" type="text" value="-4"/> <input type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Back from Buyer"/>	Weight: <input style="width: 40px;" type="text" value="-1"/> <input type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Out to Seller"/>	Weight: <input style="width: 40px;" type="text" value="2"/> <input type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Back from Seller"/>	Weight: <input style="width: 40px;" type="text" value="5"/> <input type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Complete"/>	Weight: <input style="width: 40px;" type="text" value="8"/> <input type="button" value="UPDATE"/>
<input style="width: 95%;" type="text" value="Cancelled"/>	Weight: <input style="width: 40px;" type="text" value="11"/> <input type="button" value="UPDATE"/>

2. Simply fill in the Status field and select the weight.
3. Click Add and the new Status will be added to the Status List.

Important:

- The 8 standard contract statuses will show on the list with a light font color and cannot be deleted. Those contract statuses that you add, **can** be deleted.
- The status weight is used to determine the order of the offer statuses in menus where they can be selected. The status with the smallest number will appear highest on the list.

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1.9 Owners and Reps

When you initially set up your system you will need to add all of the owners for each property that you work with. In addition, you will need to add all of the information for the representatives that work for those owners. This information is added via the Owners tab. Owners are basically the banks that own the properties that you represent.

1.9.1 Adding Property Owners

1. Click on the Owners tab on the left hand side of the screen. The following options will appear:



2. Click on the + next to Add New Owner. The following screen will appear:



A screenshot of the 'Add New Owner' form. It has a green header with a minus sign and the text 'Add New Owner'. Below the header is a form with two fields: 'Name' (a text input field with a 'Required field.' label below it) and 'Form Set' (a dropdown menu with 'None' selected). At the bottom of the form is a green 'ADD' button.

3. Fill in the Owner name. (Depending upon the owner, you may also need to select a Form Set that will be used when you create your reports. Form sets are forms that are specific to a given owner and are accessible in various areas of the system. These forms and forms sets are continually being added to the system.
4. Click on Add and your Owner will appear on the screen as shown below:



Repeat steps 1-4 until you have added all of your owners into the system.

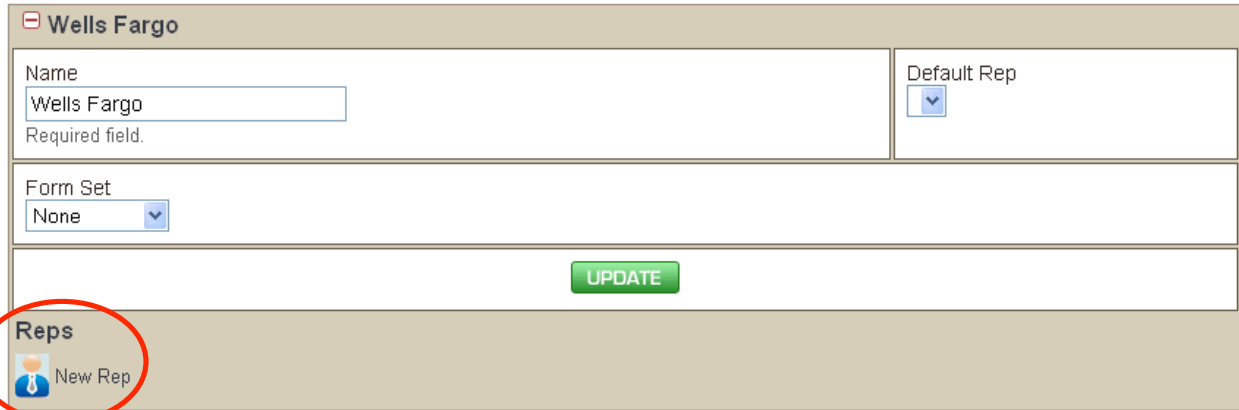
Important:

- Once an owner has been added to the system, it cannot be deleted.

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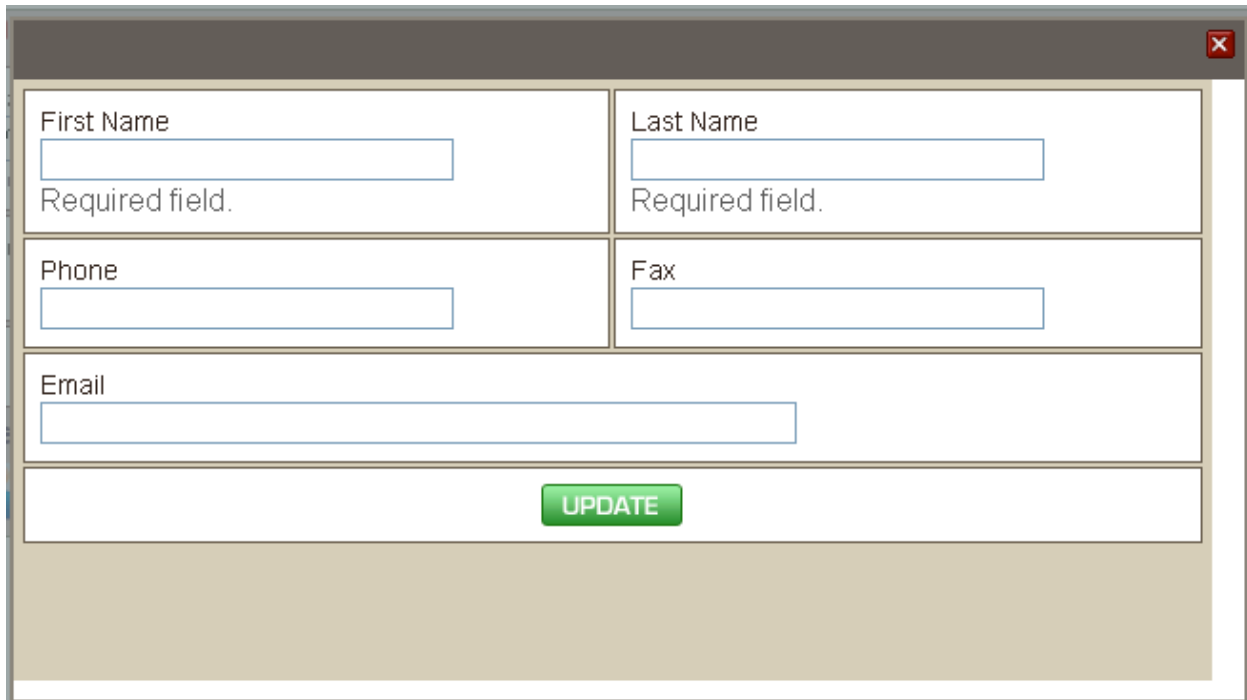
1.9.2 Adding a Rep

1. Click on the + next to the owner for whom you want to add a rep. The following screen will appear:



The screenshot shows a form for the owner 'Wells Fargo'. It includes fields for 'Name' (containing 'Wells Fargo'), 'Default Rep' (a dropdown menu), and 'Form Set' (set to 'None'). A green 'UPDATE' button is visible. At the bottom, a 'Reps' section contains a 'New Rep' icon, which is circled in red.

2. Click on the New Rep icon and the below screen will appear:



The screenshot shows a 'New Rep' form with the following fields: 'First Name' (Required field), 'Last Name' (Required field), 'Phone', 'Fax', and 'Email'. A green 'UPDATE' button is located at the bottom of the form.

3. Complete the fields and press Update

Important:

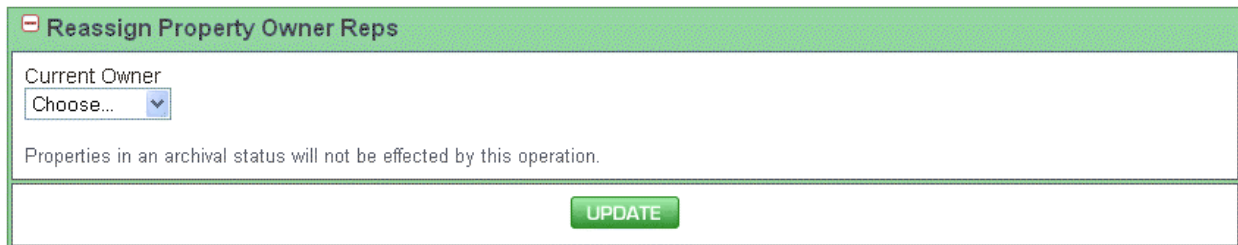
- If there is only one rep associated with a given owner, select that rep as the default rep. This will allow the reps information to automatically populate on the Main page of all properties that are owned by the corresponding owner.
- Phone numbers should be entered Area Code first. **No dashes or spaces required and phone extensions are permitted.**

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1.9.3 Reassigning a Rep

If properties that are assigned to a given rep need to be reassigned, the process begins from the Owners Tab as well.

1. Click on the + next to Reassign Property Owner Reps to view the below screen:



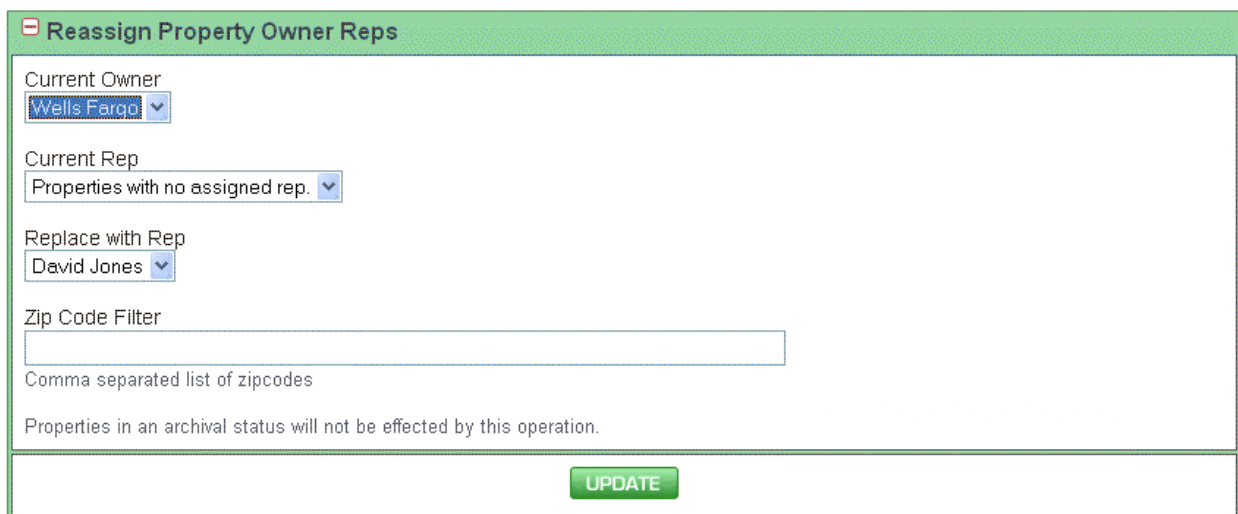
Reassign Property Owner Reps

Current Owner
Choose... ▼

Properties in an archival status will not be effected by this operation.

UPDATE

2. Select the owner from the Current Owner drop down and the following screen will appear:



Reassign Property Owner Reps

Current Owner
Wells Fargo ▼

Current Rep
Properties with no assigned rep. ▼

Replace with Rep
David Jones ▼

Zip Code Filter

Comma separated list of zipcodes

Properties in an archival status will not be effected by this operation.

UPDATE

3. Make the desired selection from the Current Rep drop down. **(Choices will include: Properties with no assigned rep, All properties for this owner, and the individual reps.**
4. Make the desired selection from the Replace with Rep drop down.
5. If you only want to reassign properties within a particular zip code(s), you may filter the selection by typing in the zip codes being reassigned. These are separated by a comma.

Important:

- Any properties that are in an archival status at the time reassignment is attempted will remain with their current rep.
- Reassigning a single property from one rep to another, in most cases, should be done from the Main page of that specific property.

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1.10 Vendors

Adding all of the vendors associated with the management of your properties is a simple process. It is done from the Vendors tab.

1.10.1 Adding Vendors

1. Click on the Vendors tab on the left hand side of the screen. The following will appear:



2. Click on the + next to Add New Vendor to initiate the below screen:

+ Add New Vendor		
Company <input type="text"/> <small>Required field.</small>	Contact <input type="text"/>	Vendor ID <input type="text"/>
Phone <input type="text"/>	Fax <input type="text"/>	Email <input type="text"/>
Address 1 <input type="text"/>	Address 2 <input type="text"/>	
City <input type="text"/>	State <input type="text"/>	Zip <input type="text"/>
<input type="checkbox"/> Inactive		
Market Global <input type="text"/>		
<input type="button" value="ADD"/>		

3. Complete all of the necessary fields and click on Add.

Important:

- Once a Vendor is created, the information can be updated, but the Vendor cannot be deleted from the system.
- If you no longer use a vendor, you can check the inactive box in the screen above. When a vendor is in inactive status, they will not appear in the list of vendors available to complete repairs.
- If you populate the Vendor ID field, it will be visible with the vendor information in on bids assigned to them in Properties > Preservation.
- The Market drop down allows you to make a vendor available only in the specific market selected. If the Global option is chosen, the vendor will be available to properties in all Markets.

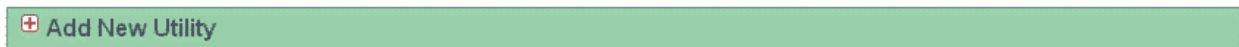
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1.11 Utilities

Updating the system with all of the utility companies that service your properties can be done from the Utilities tab

1.11.1 Adding Utilities

1. Click on the Utilities tab on the left hand side of the screen. The following screen will appear:



2. Click the + next to Add New Utility to initiate the below screen:

+ Add New Utility		
Company <input type="text"/> <small>Required field.</small>	Contact <input type="text"/>	Account Number <input type="text"/>
Phone <input type="text"/>	Fax <input type="text"/>	Email <input type="text"/>
Address 1 <input type="text"/>	Address 2 <input type="text"/>	
City <input type="text"/>	State <input type="text"/>	Zip <input type="text"/>
Type Gas <input type="button" value="v"/>		
Market Global <input type="button" value="v"/>		
<input type="button" value="ADD"/>		

3. Complete all of the necessary fields and click Add.

Important:

- Once a utility is added it cannot be deleted from the system.
- If you access your Utilities company from a website, you can keep their website information and your user name and passwords on the Broker Brain Website tab.
- It is recommended that you use this for your pool and yard vendors rather than the vendors tab. This will allow them to be tracked in the Utilities page of a specific property so that they can be tracked for shut down at closing.
- The account number field, when populated for a utilities company, auto fills in the Properties > Utilities Tab. It can be overridden for a specific property, but if the field is left blank in the properties tab, this account number will repopulate it again.
- The Market drop down allows you to make a utility company available only in the specific market selected. If the Global option is chosen, the company will be available to properties in all Markets.

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1.12 Flags

The Broker Brain system is set up with 16 colored flags that you can use to identify specific issues with your properties. You can provide a label to each flag for easy problem or detail identification for your properties. A list of suggested flag labels is below:

- PERSONAL PROPERTY HOLD
- DISCLOSURE ITEM
- PRICE REDUCTION HELD
- HOA: Used to flag HOA problems
- CAUTION: HAZARD
- WATER LEAK-REPAIR IN PROGRESS
- AGENT INCENTIVE
- AGENT REQUEST CALL WHEN LISTED

Upon initial set up of your system you will want to create these flag labels to meet your needs. It is recommended that you leave some flags with no label to allow for miscellaneous problems that might arise on a property.

1.12.1 Creating Flag Labels

1. Click on the Flags tab on the left hand side of the screen. The following screen will appear:



2. Choose the Flag color, and enter the label in the Type field. (Example: Personal Property Hold). Choose a special type if it applies to this Flag. See below for more information on special flag types.
3. Click Add.

Important:

- A property can have multiple flags attached to it as well as multiple of the same flag label.
- You can delete any flag label that you create. The flags, however, cannot be deleted. If you have a particular flag color attached to a property, and you delete the label, the flag will remain attached, but without a label.
- You can only create one label per flag color.
- Currently there are 2 Special Types to choose from when adding a new flag
 - **Agent Incentive** – If this type is selected the text entered for this flag type will print on the offer form



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- **Fannie Mae BPO** – This functionality is for future use, but when it is used it will add a flag automatically to a property when Fannie Mae puts out a BPO order for a property. It is then deleted after a BPO is created for the property after the order date.

Note: Attaching flags to properties is discussed in a different section.

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1.13 Site Settings

When your site is created it will have certain default settings including the name of the site and the logo for the site. You may very well want to change that information. This information, as well as several other settings, can be changed from the Site Settings tab.

1.13.1 Changing Site Settings

1. Click on the Site Settings tab on the left hand side of the screen. Below are two partial screenshots of what will appear followed a by an explanation of the fields displayed.

Site Settings:	
HTML Head Title	<input type="text" value="Nelson Inc"/>
Site Title	<input type="text" value="Nelson and Nelson Inc"/>
Language	<input type="text" value="en"/>
Site Template	<input type="text" value="main"/>
Current Site Logo: brain.jpg	Replace with: <input type="text"/> <input type="button" value="Browse..."/>
Time Zone	<input type="text" value="Phoenix"/> <input type="button" value="CHECK"/>
Cross Streets Filter	<input type="text" value="([A-Za-z0-9]+) x ([A-Za-z0-9]+)"/>

HTML Head Title - Changing this will affect what appears in the upper left hand corner of your internet browser Title Bar

Site Title - Changing this will affect what title appears on your browser screen.

Language - It is recommended that you do not change the Language field

Site Template - This field allows you to change the theme that your site uses. As more templates become available you will have access to them.

Current Site Logo - You can replace the Broker Brain logo with your company logo or another picture by changing the information in this field.

Time Zone - You can change the time zone for your location as well as confirm the correct time from this field. This is used for the time stamps of notes, status changes, etc.



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Cross Streets Filter - This field allows you to determine how cross streets should be entered into this system. The default filter allows for street x street to be entered. If you would like to enter cross streets into the system in a different way, send an email describing how you would like cross streets to be entered to support@brokerbrain.net. We will send you a new filter that you can place in this field.

Google API Key <input type="text" value="ABQIAAAAfat64fz4hRcrzk-LdkmhWRRvP4s77IZTzHqN2SbSW16HEzFxvRQlaTAUNjjhOA3a9MRle6K83r3D0g"/> <input type="button" value="Generate Key"/>
Maximum number of properties allowed to display as the result of a search on public portal (0 - no limit) <input type="text" value="25"/>
Message if query is over limit on public portal <input type="text" value="Search criteria matches too many properties. Please narrow your search criteria and try again."/>
Message to display at top of search results in public portal <input type="text"/>
Message to display at bottom of search results in public portal <input type="text" value="Greg Nelson REO deems information reliable but not guaranteed - buyers and their agent(s) to verify all information pric"/>
<input type="checkbox"/> No Market selector on public search page.
<input checked="" type="checkbox"/> Restrict property access by agents.
<input type="checkbox"/> Globally Disable Autotasks WARNING!!!! THIS IS VERY DANGEROUS AND SHOULD ONLY BE ENABLED AT INITIAL DATA ENTRY STAGE.
<input type="button" value="SUBMIT"/>

Google API Key - It is recommended that you do not change this field.

Maximum number of properties allowed to display as a result of a search on public portal (0- no limit) - As indicated, this field allows you to adjust the maximum number of properties displayed on your public website following a search.

Message if query is over limit on public portal - You can change the message that appears on your public website when a query returns more than the maximum allowed.

Message to display at top of search results in public portal - This allows you to change the message that appears the top of your search results on your public website.

Message to display at bottom of search results in public portal - This allows you to change the message that appears at the bottom of your search results on your public website.

No Market selector on public search page - If this box is checked, property searches made from your public website will not include the option to narrow the search by Market. All searches will be based on your entire public inventory. Leaving this box unchecked will provide the public user the option to choose the market in which they want to search.



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Restrict property access by agents – If this box is checked, access to individual properties will be restricted to the Agent that is assigned to that property or who is assigned to that agent's group. In addition, users who are set up as ***Property Agents Power Users*** or ***Property Assign Agents Power Users*** will be able to access all properties. Properties that are not assigned to an Agent will continue to display for all users.

Globally Disable Auto Tasks - By checking this box you will disable the assignment of Auto Tasks. You will likely want to do this during system roll out, when you are importing properties. **Be sure to uncheck this to enable Auto Tasks after you have imported all of your properties.**

2. Once you have made your desired changes click Submit.

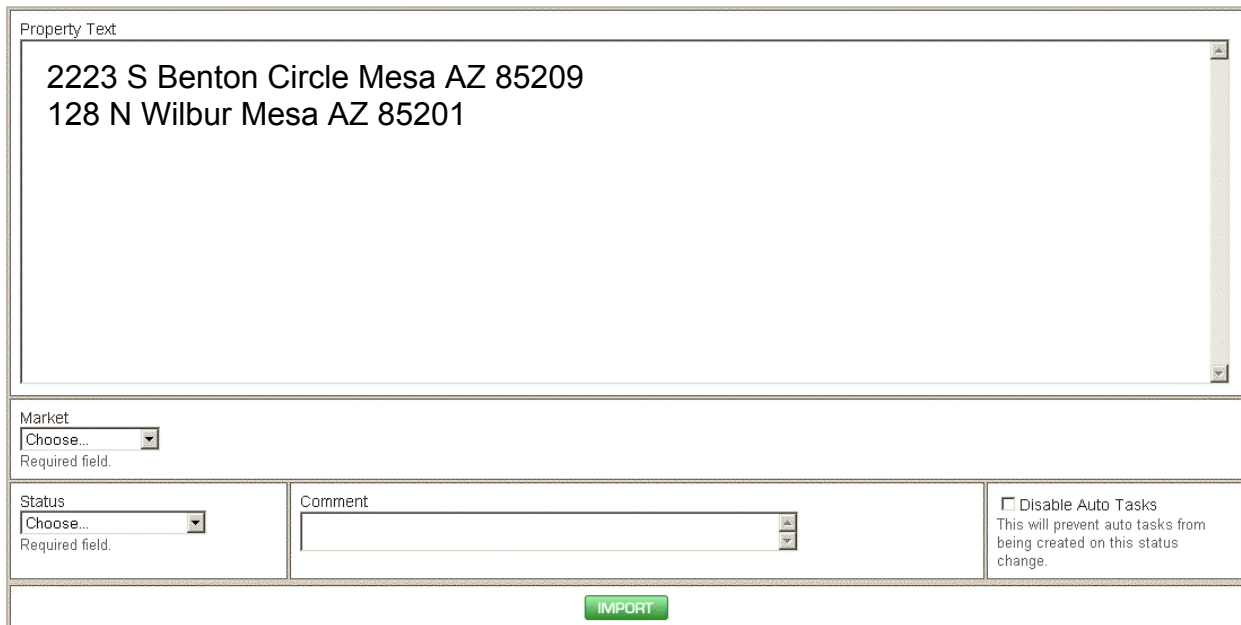
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1.14 Import

Upon activation of your Broker Brain website you will likely have multiple properties that you will need to Import into the system. Although you will typically add new properties from the Properties tab, the process to import multiple properties is done from the Import tab.

1.12.1 Importing Properties

1. Click on the Import tab on the left hand side of the screen. The following screen will appear.



The screenshot shows a web form for importing properties. It features a large text area for 'Property Text' containing two addresses: '2223 S Benton Circle Mesa AZ 85209' and '128 N Wilbur Mesa AZ 85201'. Below this are three fields: 'Market' (a dropdown menu with 'Choose...' selected), 'Status' (a dropdown menu with 'Choose...' selected), and 'Comment' (a text input field). To the right of the 'Comment' field is a checkbox labeled 'Disable Auto Tasks' with the text 'This will prevent auto tasks from being created on this status change.' at the bottom. A green 'IMPORT' button is centered at the bottom of the form.

2. Enter the addresses in the Property Text field as indicated above. Each address needs to be separated by a carriage return and cannot contain apartment, unit numbers or city abbreviations.
3. Choose the Market that the list of properties belongs to. **(You can only import addresses that are in the same Market at one time.)**
4. Choose the Status for your imported properties. **(It is recommended that you create an Imported Property Status and choose that when you are importing properties.)** Once you have assigned an owner to a property you can change it to the appropriate status. This assures that all properties are handled after the import. Once all of the properties are moved out of the Imported status, you can delete that status from the system.
5. It is recommended that you place a ✓ in the box next to Disable Auto Tasks when you perform an import.



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Important:

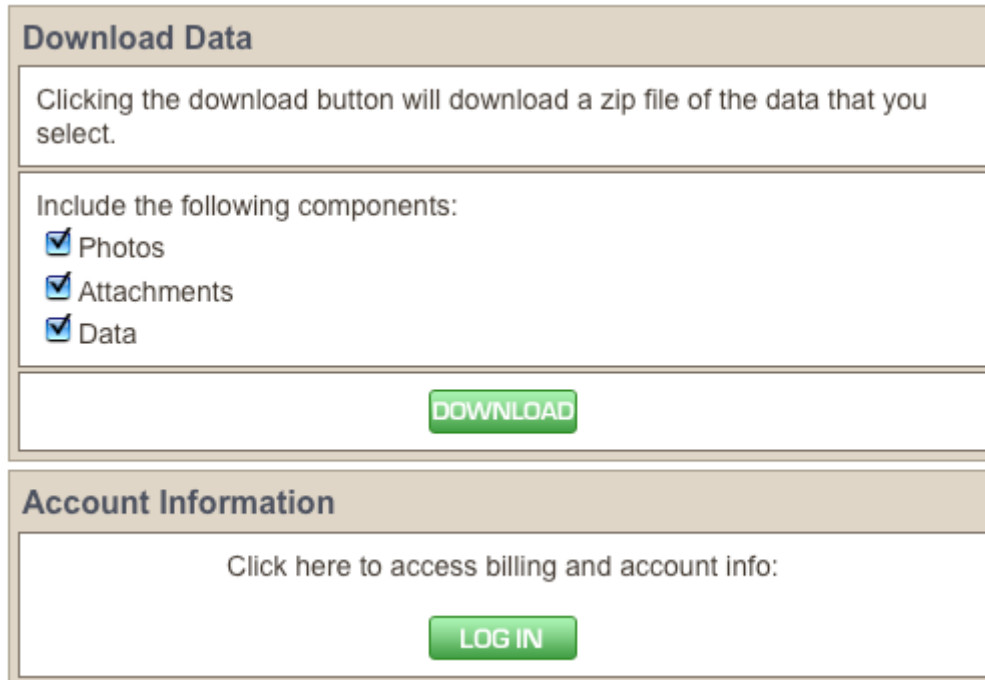
- Any addresses that cannot be resolved against Google's database will return as failures and will need to be manually entered into the system

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1.15 Maintenance

With broker brain you have the ability to download all of your database data, photographs and attachments to a local file at any time. This process is very simple

1. Simply click on the Maintenance tab on the left hand side of the screen. The following screen will appear:



The screenshot shows two main sections. The top section is titled "Download Data" and contains a text box explaining that clicking the download button will download a zip file of the selected data. Below this is a list of components to include: Photos, Attachments, and Data, each with a checked checkbox. A green "DOWNLOAD" button is positioned at the bottom of this section. The bottom section is titled "Account Information" and contains a text box with the instruction "Click here to access billing and account info:" and a green "LOG IN" button below it.

2. Check any or all of the boxes and click on the Download button.

In addition, you have the ability to change your basic account information by clicking on the Log In button. From the account information screen, you can:

- Change your Company information
- Change your Credit Card Billing Information
- Change your billing plan to adjust the number of allowable properties.
- Print billing statements for your account.

Important: For security purposes, only the original login that is created when you open your Broker Brain account will be able to access this Account Information screen