Guide to initial setup and customization of your new intouch account

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
First Time Login - Account Setup Scenarios

A) inTouch Panel is pre-activated: click any blue button and accept terms and agreement.

If you see the 5 buttons below, SKIP TO PAGE 8

B) Activation required: click “Activate Your Account” and follow setup wizard to activate

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
Scenario A: inTouch Panel is Pre-Activated

A) inTouch Panel is pre-activated: click any blue button and accept terms and agreement

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
Scenario B: Activation Required

B) **Activation required:** click “Activate Your Account” and follow setup wizard to activate

Set up your website, access your leads, manage your contacts, and build marketing campaigns.

**Activate Your Account**

"Old" InTouch / LeadRouter | Quick Start Guide

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
Review and Accept Terms

1. Check agreement box if you agree to terms and conditions

2. Verify your contact information

3. Enter your digital signature

4. Click Continue

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
Scenario B: Activation Required (cont’d)

Account Setup

1. Zip code for the office should be present. Do not change the zip code. *(if the first “0” was dropped, do not add it here)*

2. Choose your web domain. Recommended using first name last name without spaces

3. Enter your web domain again for the email prefix

4. Click *Finish Setup*

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
The inTouch panel on NRTGateway

Click on the blue Dashboard Button to Begin

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
The category column will show the status of leads from LeadRouter (Red, Yellow or Green). Click “Choose Columns”, check off “Category” and click Submit to show the column in the table.
The following pages provide step-by-step instructions for setting up and personalizing your intouch account and website.

From within the intouch system, go to:

    Admin > My Account > Settings
Find your intouch email and web address

It is important to know what your intouch website and email addresses are. You can find them at the top of the **Admin > My Account > Settings** Page.

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
From the **Admin > My Account > Settings** Page, scroll down the page until you see the first blue “Edit” button. This will allow you to edit your profile in the “Experience” section.

Click the blue edit buttons located below each section to edit content on the Settings Page. This includes your “experience text” or bio, social media links, and MLS ID shown on the next page of this guide.

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
Admin > My Account > Settings: Add/Edit your Profile

Be sure to SAVE your changes! Hint: It is recommended to create your bio in Word, and then copy & paste it to the experience section.

Once finished with your edits, you must click SAVE before moving on.

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
Adding social media links will set up the respective “icons” within your site that link to your social media pages.

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
The Agent MLS ID’s you add here will control two things:

1) the listings that will appear in the Featured Listings at the bottom of your intouch website homepage

2) the listings that will appear in the Manage Listings section of intouch, where you may create listings marketing materials

Adding your MLS ID will limit the listings featured on your home page and in the marketing center to just those connected to that MLS ID. If you wish to include all of your office’s listings on your homepage, or if you would like to have the option of creating marketing materials for listings within your office, do not enter your MLS ID here. This guide will show you where to enter an office ID under the MLS Administration section coming up in a few pages.

NOTE: You may enter up to two Agent MLS ID’s per MLS you are subscribed to.
Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
Go to **Admin > General Info** to be sure your information is correct. Click the blue edit button at the bottom of the page to make any revisions.

Review your info on this page. Use the blue Edit button to make changes.

Correct your office zip code and fax number as needed.

Recommended change: Change the time zone (by default it is Pacific, change to Eastern)

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
Activity alerts can be set up so that you are notified when someone sends you a message to your intouch account or when someone registers on your intouch website. By default, the system will have your Coldwell Banker email in place for alerts. You can add and remove emails from this list. You can also opt for text alerts by adding a mobile number. You may set up a maximum of three alerts.
Setting up an IDX feed will allow all of the listings from that MLS to appear in the Search MLS feature within intouch. Each MLS has their own process to approve and display its listings on agent sites. Some require forms and IDX fees.

Information regarding your MLS’s IDX setup can be found on the intouch page of The Everything Site. Refer to this page first for specific instructions.

In some cases, it may require that you email your MLS info to Market Leader.

In other cases, it may require you complete an application. If so, then pre-signed forms are available for download from The Everything Site.
Editing your signature is simple! Add/Edit your text and click save.

*Note: please follow your local advertising guidelines*

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
Admin > Website

Under the Admin > Website Tab, you can customize many areas of your intouch website.

Here is a list of some pages you will want to look at and customize later:

- Main Text – Edits Text at the Bottom of your Homepage
- Sell Text – Edits Text at the Bottom of your “Sell” page
- Site Images – customizes the main image on your homepage
- School Info – Edits school information
Click ADD COMMUNITY to enter communities that you serve. Click the edit icon to the right of existing communities on this page to make changes. Click the red X to delete.

It is recommended you add at least one community now. This will set up a center point for the interactive maps found out your website. You may add several communities and can customize in many ways. Click “Add Community to Begin”.

Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.

Enter Name of Community

Add a community zip code. Begin typing the zip and then select one from the options that appear below. Finally, click “Add Zip/Postal Code”

You may add custom info about the community in this window. It’s not required, but can be a great place to note local info.
Company materials, programs, or meetings that are not for compliance purposes are optional for your use as an independent sales associate affiliated with the Company. Your use is not required for your continued affiliation with the Company.
Determine the # of properties you will allow visitors to view on your website before they must register. Remember that Trulia has done a lot of research...don’t give away the info & give up leads!

Edit the # here and click the blue SAVE button
Access many help resources in the following areas:

- From HELP menu within inTouch
- Visit the Everything Site and click the inTouch banner
- For live sessions and recorded videos, visit NRTSalesPRO via the Gateway