rDesk v6.5 Production Release Notes

August 4th, 2010

LPS Real Estate Group is proud to announce the release of rDesk v6.5. These *Production* Release Notes highlight new or improved features of the product and the benefits that these features provide to LPS customers.

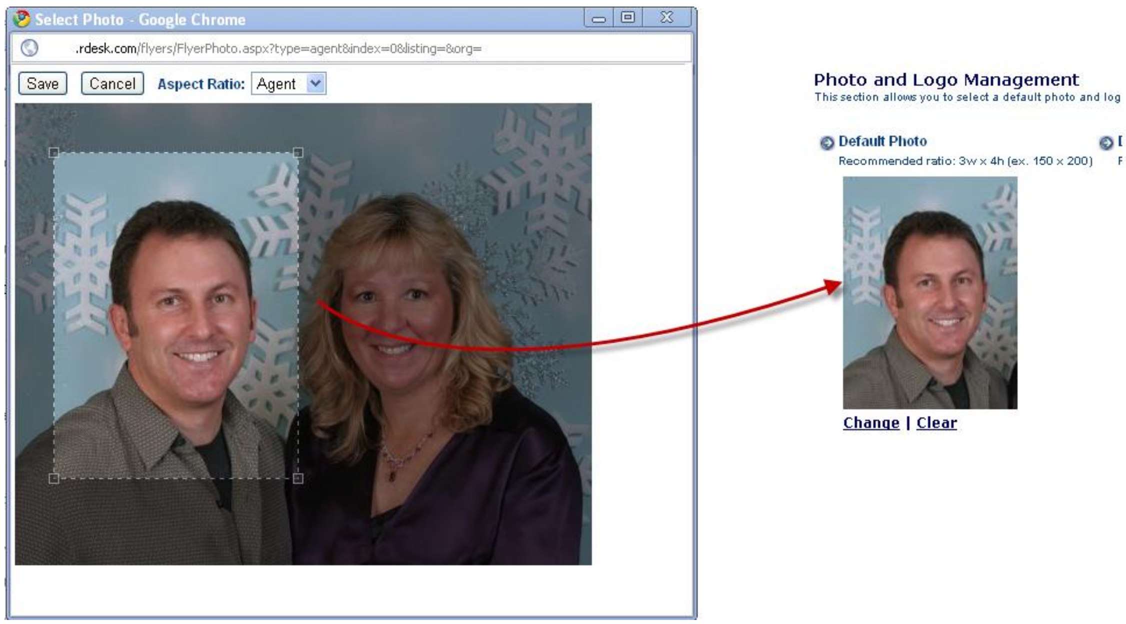
Production release date: August 11th, 2010

Note: release will occur during the evening on the night before the release date.

Release Highlights

Agent Photo Standardization Tools

The photograph upload and edit toolset has been enhanced to give agents a simple way to ensure that the aspect ratio (height and width) is appropriate for the intended use. A new ‘masking’ facility allows the agent to select the area of the photograph that they wish the use rather than rely on external re-sizing by non-technical users. This *cropped* version of the photo is saved while the original uploaded image is discarded.



Agents can select which pre-set *aspect ratio* they need to use (Agent Photo / Listing Photo or Office Logo) and the ‘mask’ will automatically retain the correct shape for the crop, as it is repositioned and re-sized.

To move the mask, simply drag the corners or the edges, to re-position the mask simply drag the center of the mask around the image.

Notes:

- This facility is available to both newly uploaded and existing images, but no facility is available to crop and ‘mask’ existing images automatically.
- If a very small image is uploaded, cropping it further will result in a badly pixilated image.

Key Benefit – Images are appropriately cropped with the correct aspect ratio for their intended purpose regardless of the original image aspect ratio.

Flyers - End User Designer Tool

A new 'Flyer Template' design tool is now available. This tool also introduces a new role. 'Flyer Admin', this new role controls the ability to add templates.

A Cobrand admin can add or edit templates at both the cobrand (company wide) level and for the office to which they belong.

The 'Flyer Admin' role gives a user the ability to maintain Office Level Templates only.

Depending on the roles, one or both new buttons are available.

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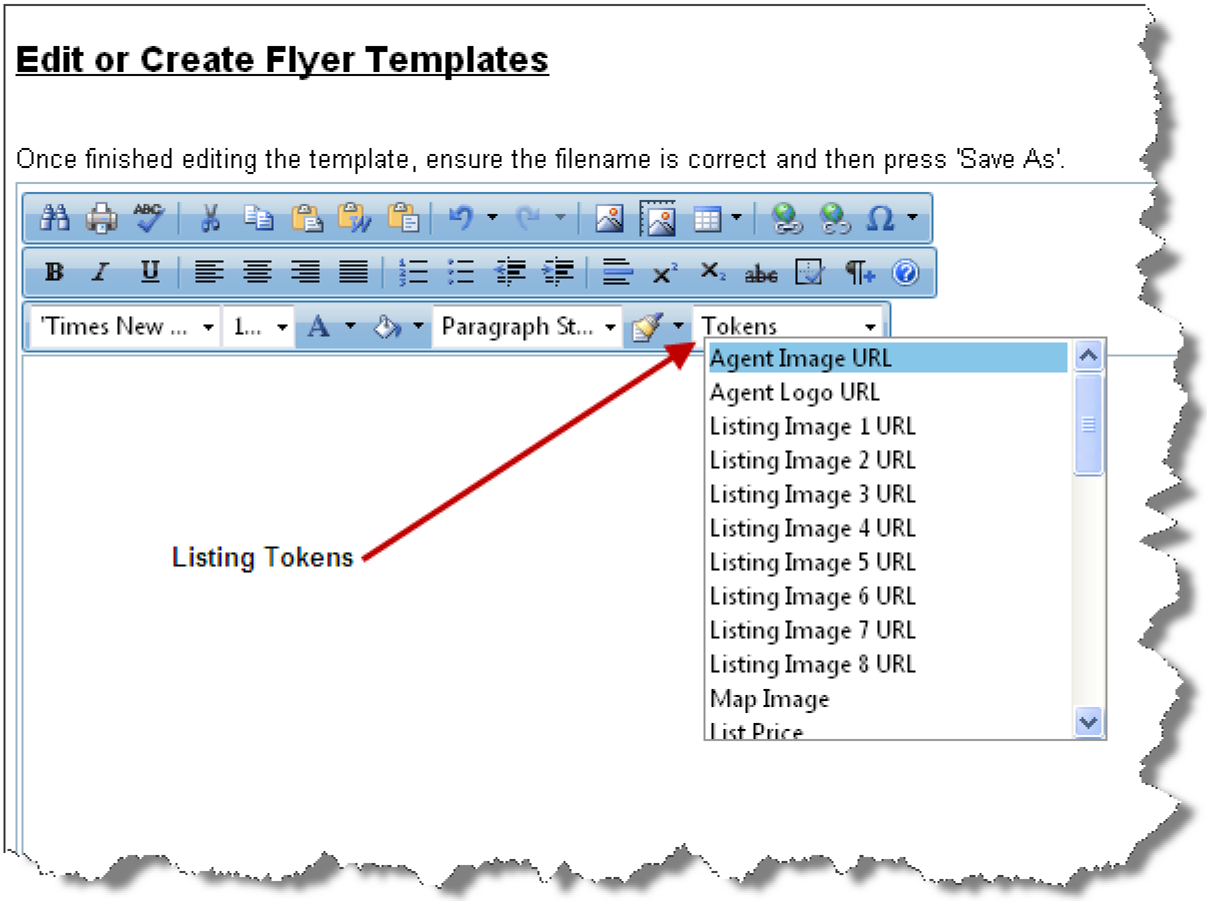
Creating a new template invokes the 'RAD editor', new 'flyer specific' tokens are available for use

- Agent Image (URL) - {{agent_photo}}
- Agent Logo (URL) - {{agent_officelogo}}
- Listing Image 1 (URL) - {{property_photo}}
- Listing Image 2 (URL) - {{property_photo2}}
- Listing Image 3 (URL) - {{property_photo3}}
- Listing Image 4 (URL) - {{property_photo4}}
- Listing Image 5 (URL) - {{property_photo5}}
- Listing Image 6 (URL) - {{property_photo6}}
- Listing Image 7 (URL) - {{property_photo7}}
- Listing Image 8 (URL) - {{property_photo8}}
- Map Image - {{property_map}}
- List Price - {{property_listprice}}
- Street Number - {{property_streetnumber}}
- Street Name - {{property_streetname}}
- City - {{property_city}},
- State - {{property_state}},
- ZIP code - {{property_zip}},
- Listing Remarks - {{property_remarks}}
- Full Address - {{property_fulladdress}}
- Agent First Name - {{agent_firstname}}
- Agent Last Name - {{agent_lastname}}
- Agent Phone - {{agent_officephone}}
- Agent Fax - {{agent_officefax}}
- Agent URL - {{agent_url}}
- Agent Office Name - {{agent_officename}}
- Feature 1 - {{feature1}}
- Feature 2 - {{feature2}}
- Feature 3 - {{feature3}}
- Feature 4 - {{feature4}}
- Feature 5 - {{feature5}}
- Feature 6 - {{feature6}}
- Feature 7 - {{feature7}}
- Feature 8 - {{feature8}}
- Feature 9 - {{feature9}}
- Feature 10 - {{feature10}}
- Header - {{header}}
- Price Remark - {{price remark}}



The RAD editor allows regular HTML to be generated, pasted or edited.

New flyer templates are not visible to regular users until they are published, but the flyer admin is free to use them for testing purposes prior to publication.

New folders for 'My Company' and 'My Office' are created for storage of these new templates, if they are empty, these folders will not be visible to agents.

Checking the 'Published' check box makes the template available to non-admin users.

Key Benefit – Flyer templates can now be created 'in-house'.

Metrics available to measure agent performance

As a part of a longer term reporting project, release 6.5 introduces a new 'behind the scenes' data collection effort to save data based on agent activity within the rDesk application. There are no reporting metric available in this release. The development simply ensures that the data is available for the future reporting efforts.

Note: there is no reporting deliverable in release 6.5, this is purely an internal development for future reporting.

Key Benefit –Future reporting on Agent/rDesk interaction.

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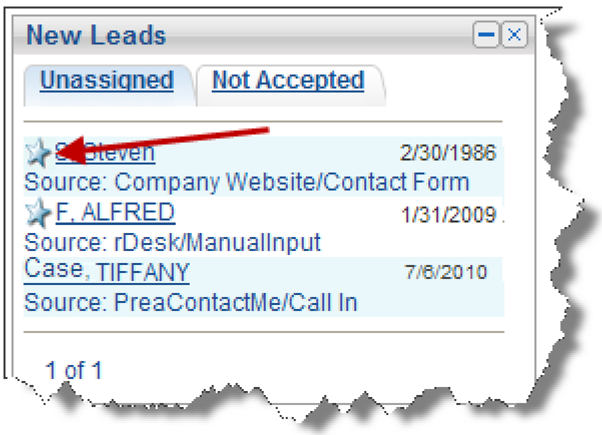
Recent Activity Icons

Release 6.5 introduces a new 'recent activity' icon available on the New Leads widget and within Leads Management. The star icon indicates the following actions within the past 48 hours:

- Any action on the part of the lead/contact
  - rBW updates sent to rDesk (ContactService webservice).
  - Contact unsubscribes from email from QuickEmail/APM (rdesk.com/unsubscribeURL.aspx).
  - Bounce back emails (rdesk_CRMUndeliverableProcessor).
- Lead Admin adds new note to lead via Lead View page but not deleting notes. You cannot edit a note.
- Any action on the part of the agent within rBW where an update is sent to rDesk

Notes: Recent Activity does not include the following:

- *Any action on the part of the agent within rDesk on the contact information.*
- *Action Plans sent to a contact.*
- *QuickEmails sent to a contact.*
- *Assigning a lead to an agent*
- *Lead retraction regardless of whether is re-routed or remains at the company or office level.*



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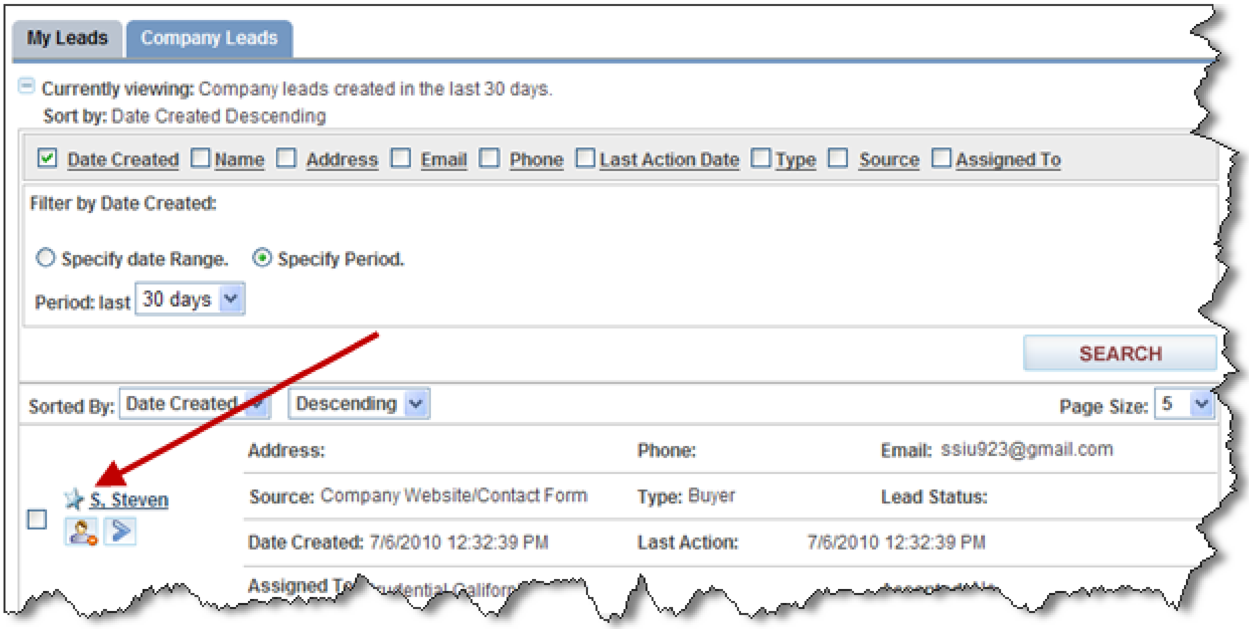


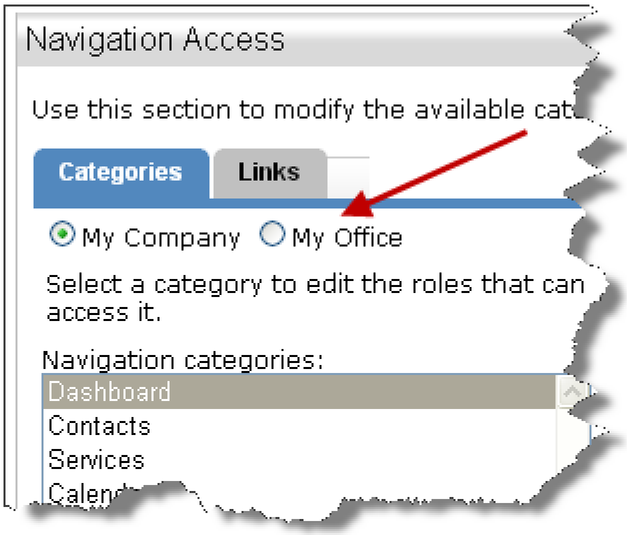
Note: The icon is a blue star by default, but is controlled via css and thus can be customized.

Key Benefit –Easily identify leads that have been active and therefore may need agent attention.

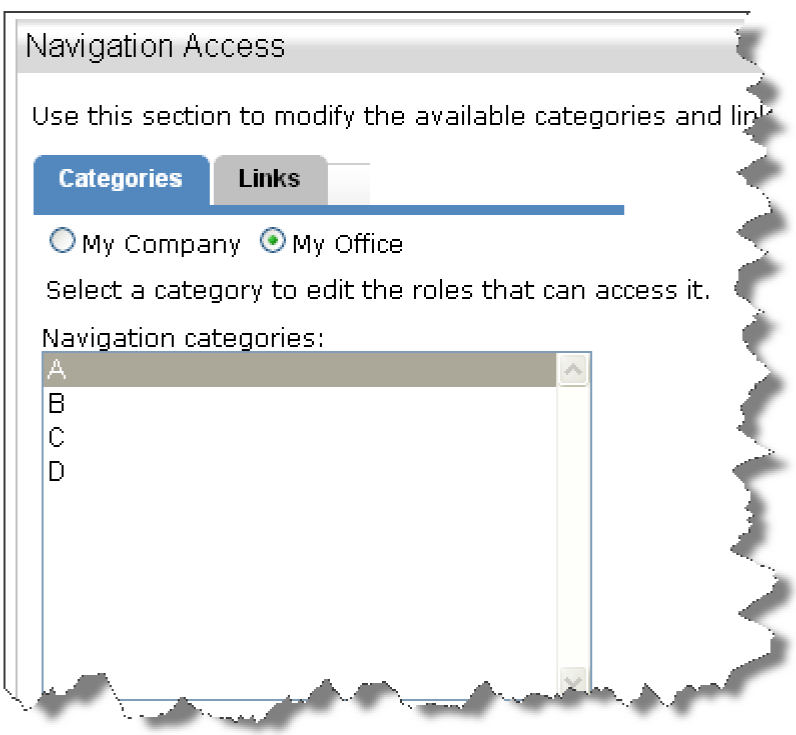
Office Admin facility to create office level content.

Office Administrators can now add office-level menu options and sub-menu options, plus office-level widgets that are only visible to agents that are members of the office.

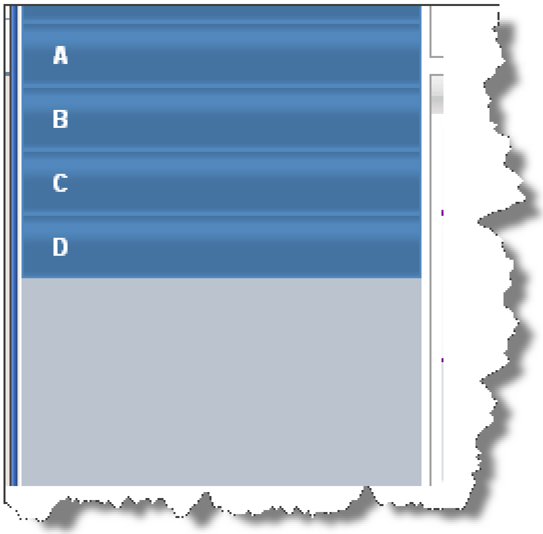
This facility adds new 'My Office' radio buttons to control the level of access.



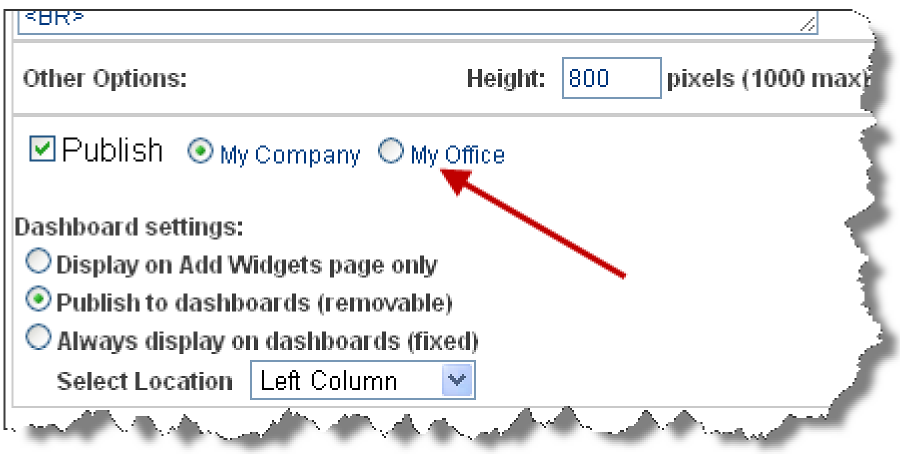
Office level content is added only to user-defined 'office specific' menu categories



These categories are added to the bottom of the left-nav menu system and are sorted alphabetically.



Widgets also gain 'My Office' functionality.



Key Benefit –Allow office administrators to create office-level localized content and links

Performance - Improve e-mail Performance

Release 6.5 introduces a significant performance boost for the e-mail sending facility.

Key Benefit – e-mail will be sent more promptly

Direct Mail Integration API

A new API that consists of a pair of web-service calls designed to allow direct mail and similar companies to retrieve a single agents' contact list and to write-back a history record when an action is taken against an individual contact is now available.

1) API for DM companies to read agent client list
    a. Supply Agent rDesk credentials
    b. Receive contact data.
2) API for history insert
    a. Supply Agent rDesk credentials, rDesk contact ID, History information
    b. rDesk posts contact history item to contact

Workflow

1. User navigates to direct mail sites. The workflow for the user to login to the direct mail vendor is outside the scope of this enhancement. This task does not concern the creation of any new seamless login facilities.
2. Within the vendor's site, the user selects direct mail marketing piece and the associates the pieces with their contacts.
3. Within the vendor's site, the user selects contacts from list held on the direct mail vendor's site.
4. Within the vendor's site, the associates' direct mail piece with contacts.

Use case - Manually loading contacts into direct mail site.

1. User initiates a 'contact fetch' from direct mail vendor's site / application.
2. The direct mail site will call the rDesk WebServices to pull contacts from rDesk
3. The direct mail site will 'makes them available' within the direct mail app.

Note: There is no facility for the direct mail application to push modified contact data back to rDesk.

Background Experience

The direct mail vendors may choose to pull the rDesk contacts using a 'timed' or background process; this process will read the contacts from rDesk and make them available to the agent

Vendors may choose to perform the data pull for only for the agents that are actively using their facilities in order to limit the data transfers.

User Experience – Print History association

When the direct mail companies print an item that is to be sent to an agents contact, a history record will be uploaded to rDesk for that agent/contact combination.

This history record will simply be passed via the API to the contact record and will be available like all other history records in the history tab for contacts.

If you are interested in leveraging this API, please contact your Account Manager for the detailed specification documentation and details on the current Direct Mall companies with whom you can work with to take advantage of this functionality.

Key Benefit –The Standardized API will allow multiple Direct Mail and similar companies to integrate with rDesk.

User Interface - Tab and Sub-Tab standardization

A further 'infrastructure' change in rDesk 6.5 has standardized the controls used for Tabs and sub-Tabs, thus enabling future development of Tabs and Sub-Tabs used throughout rDesk.

Key Benefit –Future Tab/SubTab development will be smoothed.

Removal of CyberHomes tokens and graphs.

All Cyberhomes graphs and tokens have been removed.