

## Quick Reference How To Use My Portfolio

After registering you'll see the following. Your top bar has you're My Portfolio functions.

**LISTINGS** - you've viewed and saved

**SEARCHES** - searches you've created

**MESSAGES** - notes I send you periodically as we work together

**PROFILE** - change your email, phone, password. Remember the system sets your password to the email id you gave me. So if you signed up with Billy@Buyer.net then your password is also Billy@Buyer.net (until you change it).

The screenshot shows the 'My Portfolio' interface with a navigation bar containing 'Overview', 'Listings', 'Searches', 'Messages', 'Profile', and 'Help'. The 'Overview' tab is selected. The main content area contains the following text:

My Portfolio gives you the ability to use your valuable time effectively. With My Portfolio you can save listings and searches while at work and then return to the same listings and searches from home. My Portfolio also makes it possible for you to sign up for listing searches so that you will be the first one notified of new listings that match exactly what you are looking for.

You will notice that on every page you are shown an overview of your account. This overview includes the number of saved listings, the number of saved searches, a log out button, and a My Portfolio overview button that brings you to this page.

NOTE: You are automatically logged out after 20 minutes of inactivity! If this occurs please log back in!

Setting up your search. Simply click on the SEARCHES tab, then click on Create a new search

The screenshot shows the 'My Portfolio' interface with the 'Searches' tab selected. A red oval highlights the text 'Create a new search by clicking here.' Below this text, it says 'There are no searches saved yet!'.

The screenshot shows the 'My Home Finder' search form. The 'Property Search' section is highlighted with a red oval. The form includes fields for State and County, Address, Price, Home Types, Home Details, and a 'Search Now' button.

Enter your search criteria:  
County, City, Subdivision,.....  
Price (min, max)....  
Bedrooms, Setting up....  
Etc.....

Then click on Search Now

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**My system will return the properties meeting your criteria.**

- To SAVE .... Click on **SAVE THIS SEARCH**
- Then tell the system the **NAME** you want to use for the search (you can have multiple searches)
- And how frequently you want it to run and click on the **Finish** button
- Your new search will be displayed (you can then modify, delete, rerun.....)

My Home Finder    Messages: 0    Saved Listings: 0    Saved Searches: 0    [Help](#) | [Overview](#) | [Log Out](#)

My Home Finder    




Below are your search results. If you are satisfied with your search, you can proceed by clicking the 'Save Search' button below.

**Property Search...**

Below are the listings that match what you are looking for. To view more details of a specific listing click on 'click here for details'. You can change the sort order by clicking on any column heading. You can also reverse the search order by clicking on the red arrow for the current sort column.



Previous 10 | 1 | Modify Search

	price	city	beds	baths	sq. feet
	\$949,900.00		5	3.1	4861
<a href="#">click here for details, view and more photos</a>					
<b>Room Information:</b>					
Master:		40X50			
Bedroom 2:		14X14			

Internet    100%

My Portfolio    Messages: 0    Saved Listings: 0    Saved Searches: 1    [Help](#) | [Overview](#) | [Log Out](#)

### My Portfolio

### Searches


Overview    Listings    **Searches**    Messages    Profile    Help

My Portfolio    



Please title your search and select how often you want your search to run. After selecting how often you want you search to run click the 'Finish' button.

Name Your Search!    Search title

Run my search    Every day 

- Every day
- Every 2 days
- Every 3 days**
- Every 4 days
- Every 5 days
- Every 6 days
- Every 7 days
- Every 14 days
- Do Not Run

My Portfolio    Messages: 0    Saved Listings: 0    Saved Searches: 1    [Help](#) | [Overview](#) | [Log Out](#)

### My Portfolio

### Searches

Overview    Listings    **Searches**    Messages    Profile    Help

Create a new search by clicking here.

Below are all the searches you have saved. To view a search click on 'Re-run Search'. To remove a search click on 'Remove'.

My New Search	
Re-Run Search   Remove	no user comments
State: Nevada	Add Comments
Price Range: \$900,000 to \$990,000	
Automatic search notification settings: modify   disable automatic search	
This search will run every: 3 day(s)	

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While you're working in the Portfolio and reviewing homes you may be interested in you can SAVE them to your Portfolio. Just click on SAVE LISTING.

You can then View, Schedule Showings, Add / Edit Notes, or Delete.






My Portfolio
Messages: 0
Saved Listings: 0
Saved Searches: 1
Help | Overview | Log Out


### My Portfolio Help

Overview
Listings
Searches
Messages
Profile
Help

**Saving Listings**  
 First, you will need to be logged into My Portfolio just as you are now. Once you are logged in perform a search for a listing. Once you find a listing you would like to save click on the 'Save Listing' link. This will add the listing to My Portfolio. Once the listing is in My Portfolio you can also add comments to the listing.


**Saving Searches**  
 First, you will need to be logged into My Portfolio just as you are now. Once you are logged in perform a search for a listing. Once you are viewing the search results click on the 'Save Search' link. Once you have a saved search you can re-run any search from your list of saved searched within My Portfolio.

  
Print
  
Save Listing
  
Ask Questions
  
Schedule a Personal Showing




\$949,900.00

est: \$4,740.91 prin & int/month



My Portfolio
Messages: 0
Saved Listings: 0
Saved Searches: 0
Help | Overview | Log Out

My Portfolio
Messages: 0
Saved Listings: 1
Saved Searches: 0
Help | Overview | Log Out


### My Portfolio Listings

Overview
Listings
Searches
Messages
Profile
Help

Below are all the listings you have saved. To view a listing in more detail click on 'View Listing'. To remove a listing click on 'Remove'.

Show listings in the -- All Listings -- folder Submit

Select/Deselect all listings

<input type="checkbox"/>		Price: \$949,900 Sq Ft: 4861 Beds/Baths: 5/3.1 Saved Notes: none	<div style="background-color: #003366; color: white; padding: 2px; text-align: center;">View</div> <div style="background-color: #003366; color: white; padding: 2px; text-align: center;">Schedule Showing</div> <div style="background-color: #003366; color: white; padding: 2px; text-align: center;">Add/Edit Notes</div> <div style="background-color: #cc0000; color: white; padding: 2px; text-align: center;">Delete</div>
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Select/Deselect all listings
 Delete selected listings

Move selected listings to the
-- All Listings --
folder
Submit

Move selected listings to a new folder titled

Submit

Create a new folder titled

Submit

## Quick Reference How To Use My Portfolio

From time to time.... I'll post notes for recent homes that come on the market or special information.  
Please click on Messages from time to time.



Your Profile tab contains your personal profile.

Please insure I have your correct email address and phone numbers.

I also suggest you change your password to insure no one can access your Portfolio.

Please feel free to call me with any questions. I'll be glad to help you.

The screenshot shows the top navigation bar with 'My Portfolio', 'Messages: 0', 'Saved Listings: 0', 'Saved Searches: 1', and 'Help | Overview | Log Out'. Below this is a sub-navigation bar with 'Overview', 'Listings', 'Searches', 'Messages', 'Profile', and 'Help'. The 'Profile' tab is highlighted in blue and circled in orange. The main content area contains the text: 'To update to your profile, make any necessary changes and click the Update button. To change your password, type your current password and your new password twice in the second form below and click the Update Password button.'

First Name:	Your
Last Name:	Name
Address:	123 Main Street
	Suite 300
	YourTown, ** Select One **, YourZip
Email Address:	YourEmail@xyz.com
Daytime Phone:	330-493-0350
Evening Phone:	330-493-0350
<input type="button" value="Update"/>	