Getting Started with Intradesk

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1. Welcome to Intradesk

Before you start using Intradesk, it is a good idea to familiarize yourself with all of its features and capabilities. Doing this will ensure that you get the full benefits that Intradesk has to offer your company right away.

This guide assumes you have basic computer skills, and understand basic terms regarding websites and know how to navigate them. Some Intradesk-specific terms that are used in this document are defined in the glossary at the end.

2. System Requirements

Any computer that can run Internet Explorer 6 or Internet Explorer 7 can use Intradesk. The speed of many operations within Intradesk (searching and reporting, for example) will be affected by the speed of your Internet connection. Even for a single user, a broadband (high-speed) Internet connection is highly recommended. For an office setting where multiple users may be using Intradesk simultaneously on the same Internet connection, a business-class high-speed Internet connection will be required.

3. First Steps

3.1. Logging In

Once you have your username and password for Intradesk, you simply need to open the Intradesk website in your Internet Explorer browser:

http://www.intradeskoffice.com/

Once there, you will be prompted for your information. After you use it to log in, you can begin using Intradesk right away.

3.2. Intradesk General Configuration

The first things you should configure in Intradesk are the values in some of the drop-down menus for populating certain fields in the program (such as City). To do this, select Setup->General Settings->Dropdown Settings from the Intradesk menu.

3.2.1. Delete the Default Sample Cities

To delete the sample cities, select each city you want to delete in the field next to the Delete City link, and then click the Delete City link.

3.2.2. Add your Cities

To add new cities to the list, type the city name in the field next to the Add City link, and then click the Add City link. These values are used for the Listing, In-house Agent, Employee, and Office forms, so you should add all of the cities that you do business in. You can always come back and add more cities later if you forget some, or expand your business into new areas. Contacts, Prospects, and Outside Agents are not restricted to these cities, so you don't have to worry about those when entering cities (just the cities that your own office does business in).

3.2.3.Other Customizable Drop-downs

You can now repeat the same process to configure each of the drop-downs listed on the form, as described below:

Listing Activities - This field defines the different types of miscellaneous activities that you can record in a listing's history. You can record things like Home Inspections, Appraisals, Walkthroughs--basically anything that you do to a home that you would want to keep a record of in Intradesk.

Contact & Prospect Activities - This is similar to Listing Activities, but defines the kinds of activities that can be recorded in the history of your Contacts and Prospects. You might want to keep track of things like the last time someone from one of your offices communicated with the contact.

Agent & Employee Activities - Again, this is similar to the Listing Activities, but defines the kinds of activities that can be recorded in the history of your Agents and Employees. You might want to keep track of things like Sick Days and Vacations here.

Listing Flags - This is an optional value that can be assigned to listings to keep track of a wide variety of things. How you use it is entirely up to your own preferences. Some companies like to use it to indicate listings that should not be advertised, listings with backup offers, or pocket listings.

Lead Sources and Ad Categories - Lead Sources is a list of all possible sources from which you can get leads that you will be keeping track of in Intradesk. For example, Walk-ins and TV Ads. Ad Categories is the subset of Lead Sources that are a result of advertising. For example, Walk-ins would not be an Ad Category, but TV Ads would.

Specific Sources - Each of your Lead Sources can be broken further down into specific sources. For example, a TV Ads source might be broken down into specific TV stations that you advertise on, or a Newspaper Ads source might be broken down into specific publications that you run ads in. When working with this field, it is important to first select the Lead Source that you want to work with in the Lead Source drop-down menu.

File Categories - Intradesk has a Company Intranet tab on the My Intradesk page (you can see it when you first log in, or by clicking the Intradesk logo in the upper left corner of your browser any time while logged in to Intradesk). The File Categories specify the different categories that you can upload files to for your agents and other users to download. Commonly used categories are things like Listing Forms, Logos and Press Materials, etc.

3.2.4.Things to Keep in Mind

You can always come back and add new values to any of these drop-down menus at any time. It is important to remember, however, that deleting values that are already in use (for example, deleting a City that has already been assigned to Agents or Listings, or deleting a Specific Source that has already been used in advertising runs) will cause data inconsistencies in your database and could create problems with some of your reports. It is never a good idea to delete values on this screen once they have already been used in the system.

3.2.5.Can Any Other Drop-downs Be Customized?

Other drop-down menus in Intradesk can also be customized (for example, the Improvement, Style, Heating, Cooling, etc. fields on the Listing forms). Currently, the only way to customize these fields is by contacting Intradesk support at http://www.reladev.com/contactus.html and having us do it for you.

3.3.Security Configuration

Before entering your Agents and Employees, it is a good idea to look over the Security settings in Intradesk--especially if you plan on letting your agents and employees log in. You can do this by selecting Setup->Security from the Intradesk menu.

Intradesk uses security classes to define what whole groups of people can and can't do in Intradesk. You select the security class that you want to configure using the Security Class drop-down at the top of the form. Once you have configured a security class, you can assign it to multiple individual Agents, Emplyees, Contacts, and other users who you want to be able to log in to your account.

When examining and customizing the different security classes, be sure to look at each of the tabs available on the form (Listings & Transactions; Contacts, Agents & Employees; and Messaging, Billing & Administration). After you have configured the different security classes to your liking, click the Update button to save your changes. Any changes you make to security classes that have already been assigned to a user will take effect the next time that user logs in.

3.4.Company Offices Setup

When your account was created, your main office was entered into the system for you. The first thing you should do is make sure that the information for your office is correct, and enter your other offices into Intradesk

To view, add, and edit company offices, select Setup->Company Offices from the Intradesk menu. You will be presented with a list of offices already in the system, which you can click to view and modify, as well as an Add New button which you can use to enter new offices.

Some things to keep in mind when entering office information:

Fields with bold labels are required information--you must enter a value in those fields before it will let you save the office information.

The Office Name does not need to be the legal name. You can use casual identifiers for the name, such as "Naples Office" or "South Office" to keep things more concise and recognizable in the program. This field may also be used on your website if Reladev is hosting it for you.

3.5.Email Events Setup

A very powerful feature of Intradesk is the ability to configure emails to automatically be sent out when various events are triggered within the program. It is important to create the email events you want to use before you start entering information into Intradesk, because certain events are only triggered when information is added (for example, listing expiration notices are triggered when the listing is added to Intradesk).

To configure your email events, select Setup->Email Events from the Intradesk menu. You will be presented with a list of events that have already been configured, as well as an Add New button that will allow you to define new events.

3.5.1.Adding A New Event

When adding a new event, you will be prompted for the event that triggers the email (i.e., what should cause the email to go out?), when to send it (immediately, before the event, or after the event), who to send it to (the options available vary depending on the type of event), who to send it from, as well as the subject and message content for the email.

3.5.2.Dynamic Email Content

The message content can be configured to contain dynamic information about the event that has been triggered. For example, in a Listing Expiration notice, you will probably want to include the listing's MLS number and address in the email so that the recipient knows which listing is expiring. You do this by including the text [MLS Number] and [Listing Address] (including the square brackets) in the Email Message field. There are lots of other dynamic content tags that you can include in the emails--all of the available ones are shown to you in the Insert Dynamic Content field next to the Email Message field. You can see what your email would look like with the dynamic content replaced with real values by clicking the Preview Email link under the Email Message field.

Emails can be triggered on dozens of different events in the program. Be sure to read them all, and be creative when setting them up!

4.The Next Step

Now that you have finished setting up Intradesk, you are ready to start using it! The next step would be to enter your Agents, Employees, Listings, and other information so that you can start enjoying all of the benefits that a complete office management solution like Intradesk can bring to your company. For help with anything in Intradesk, you can check the Intradesk Knowledge Base at http://www.reladev.com/idkb/, or you can always contact Intradesk Support at http://www.reladev.com/contactus.html.

5.Glossary

Contact - In Intradesk, a contact is any individual whose information is stored in your contacts database. The contacts database can be searched by selecting Contacts->Search->Contacts from the Intradesk menu. Intradesk allows you to store a wide variety of contacts, from buyers and sellers, to sign and virtual tour vendors, to mortgage and title companies, and more.

Drop-down menu - This refers to special fields that appear on certain forms in Intradesk that allow you to select from a pre-populated list of values. An example is the City field when entering a new In-house Agent into the system. This is done to keep your data consistent, by avoiding spelling mistakes or different ways of referring to the same thing (for example, Fort Myers versus Ft. Myers).

Dynamic content - This refers to content in an Email Event's Email Message field that changes depending on the event that triggered the email. Dynamic content is specified in an email message by using dynamic content tags.

Dynamic content tag - A special value that can be included in the Email Message field of an Email Event that will be replaced by a value specific to the event once the email gets sent out. For example, the value [MLS Number] (including the square brackets) in a listing-related email event will be replaced by the MLS number of the actual listing that triggered the event when the email gets sent. Dynamic content tags are always contained within square brackets. The dynamic content tags available for a specific email event are always listed in the Insert Dynamic Content list next to the Email Message field.

Email event - The name in Intradesk for the set of rules that causes automatic emails to be sent out when various events happen in Intradesk. These can be viewed, modified, and created by selecting Setup->Email Events from the Intradesk menu.

Intradesk menu - The menu of options located on the left side of the browser window after you log in to Intradesk. (Listings, Agents, Contacts, etc.). When this document refers to selecting something from the Intradesk menu, it will reference each level of the menu to select, separated by an arrow (->). You only need to click the last item specified. For example, to select Contacts->Search->Prospects from the Intradesk menu, you move your mouse first over the Contacts menu item. A new sub-menu will appear, which contains the Search item, which you should move your mouse over. Again, a new sub-menu will appear, containing the Prospects item, which you should click on (since it is the last item specified).

Prospect - A prospect in Intradesk is a special kind of contact who is a potential buyer or seller. Additional information about the prospect, beyond what is normally recorded about contacts, can be stored--such as the kind of listing they are interested in, specific interests (how many bedrooms they want, bathrooms, etc.), who their assigned agent is, and more.

Security class - A class that users in Intradesk are assigned to that defines what they can and can't do within the program. It is possible to define multiple different security classes in Intradesk, and to assign multiple individual users to each security class.