

CBT Newsletter System

About the system

To help simplify, speed up, and Coldwell Banker Tomlinson has been created to help Agents and administrative staff manage the monthly newsletter mailings through an online portal available 24x7. This system, eliminates the agent return and client labels, applying them to the newsletter, folding the newsletters, sorting by zip code and meeting the office drop-off deadline. All of these processes will now be performed by Lawton Printing.

Feature of the system include:

- Upload your mailing list
- Upload your photo to be used on the cover of the mailing (referred to as your Profile Picture)
- Specify how many blank newsletters you'd like to receive for handouts
- Customize the inside section of your newsletters with your own language and images

In addition to eliminating manual processes, the new system includes several other features:

- 1) Ability to personalize your mailings with a picture of yourself and a message to your clients
- 2) Ability to upload and manage your own mailing list(s)
- 3) Ability to designate a quantity of monthly "unaddressed" newsletters personalized with your picture and message that you can hand out as needed

Logging In

Username and passwords have been setup for all agents currently participating. New agents can create their own profiles or Lawton Printing can create profiles for you if you email your contact information to support@cbtnewsletter.com. Lawton will respond with your username within a few hours or the next business day.

To login, visit <http://www.cbtnewsletter.com> and enter your email address and password. You can also click the "forgot password" link if needed. If you are unable to receive the password reset email or are unable to get logged in, please contact support@cbtnewsletter.com.

Once logged in, you will see a status for the upcoming newsletter order including the order deadline, whether you're signed up for the order, the # of newsletters that will be mailed on your behalf and the # of blank newsletters you've requested. You can customize all of these settings by clicking the links next to each item, and, if there's an issue with some part of the order, you will also see some type of warning message.

Editing Your Profile

Your profile contains your contact details as well as your profile picture which appears on the cover of the newsletter. To edit these details and upload/update your photo, click the "Edit Profile"

My Profile

CBT Newsletter System Sign Out

Home My Profile Newsletter Options My Addresses

My Profile

Profile Information	
ID	7
First Name	<input type="text" value="John"/>
Last Name	<input type="text" value="Monek - Regular"/>
Branch	<input type="text" value="North Side"/>
Email	<input type="text" value="jmonek@gmail.com"/>
Profile Photo <i>Appears on the cover of the newsletter</i>	<input type="button" value="Browse..."/> No file selected.
Update Password	<input type="checkbox"/>

Update the contact details as needed. To upload a photo, simply click the **Browse** button and you will be given a window to browse your computer for a new image. Once you've selected an image, you will be returned to the Profile page. You must click the **Update Profile** button to save the new settings.

Notes about your profile picture

- This image will appear on the cover of the newsletter
- This image may be cropped or trimmed as needed to fit its spot,
- If possible, use a high-resolution image (300 dpi) that is at least 800px x 600px

Editing Your Newsletter Options

The newsletter system is very flexible and allows you to setup automatic ordering each month, specify the number of blank newsletters you'd like to receive, and, specify custom language and a custom photo for the sidebar of the newsletter.

To edit these settings, click the "Newsletter Options" link.

Newsletter Options

Newsletter Options	
Automatically Order Each Month?	Yes
Include me in Next Order (6/10/2018)?	No
# of Blank Newsletters for Next Order	0
Address List for Next Order (6/10/2018)?	13 Addresses
Customize Newsletter Side Bar	
Customize Newsletter Side Bar	<input type="checkbox"/>

[Cancel](#) [Update Newsletter Options](#)

You can change your automatic ordering settings, specify if you want to take part in the next month's order, enter the # of blank newsletters you'd like to receive and see the # of clients in your client database which will receive the next mailing.

You also have the **option** to personalize the newsletter side bar with a photo, title and language. If you do not enter personalization information, the default language and photo will be printed.

Notes about your newsletter options

- If you sign up for automatic reordering, you will still receive a monthly email confirmation prior to the order deadline so you can change settings if needed
- The # of addresses is based on your mailing list (see instructions below on updating)

Customizing Newsletter Side Bar

To personalize this information, tick the “Customize Newsletter Side Bar” check box.

Customize Side Bar

Customize Newsletter Side Bar

Customize Newsletter Side Bar

Side Bar Photo

Browse... No file selected.

COLDWELL BANKER

TOMLINSON

Delete Photo:

Side Bar Title

Limit to 50 characters to avoid being cutoff

Sample Title

Total Characters: 12

Side Bar Text/Bio/Story

Limit to 1500 characters to avoid being cutoff

Sample Lanaguge
s
No Formatting allowed sef esft thing
working how many words can we get in
the box?

We can get get quite a few words into
the system here with along description
of what it is.

Total Characters: 194

Cancel Update Newsletter Options

You can upload a photo (appears at the top of the side bar), enter a title and enter up to 1500 characters of text in the sidebar.

Notes about customizing your side bar

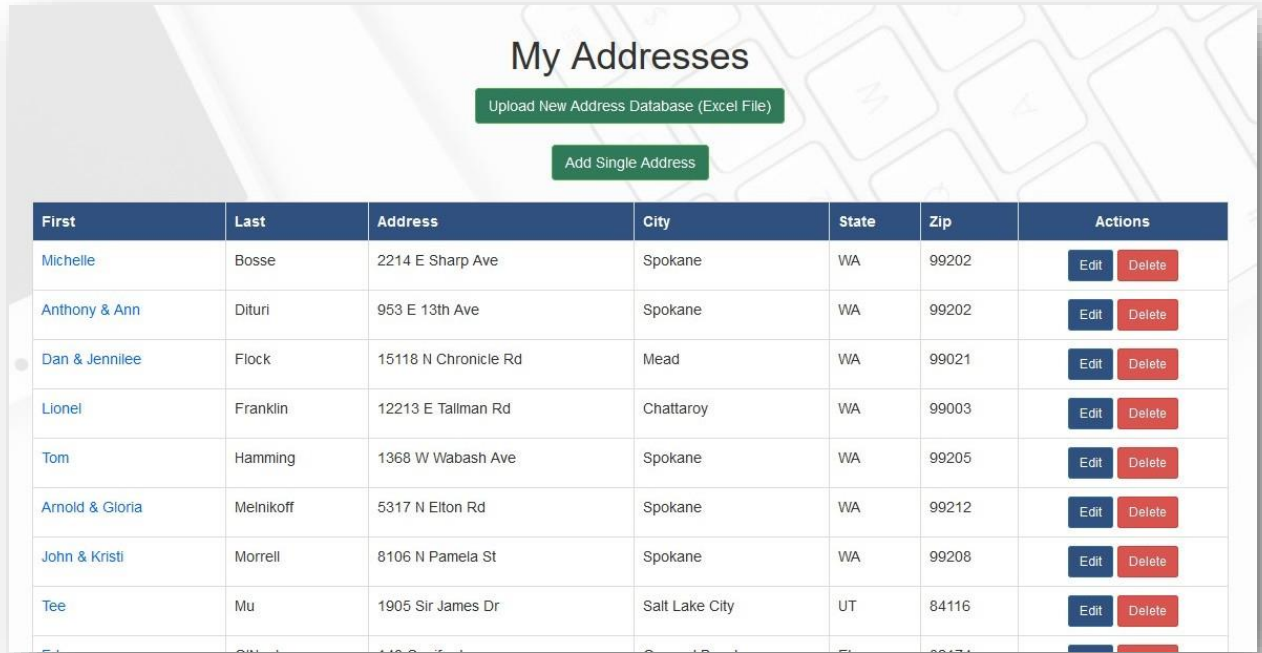
- Follow the same photo standards outlined for the profile picture
- No formatting is allowed in the title or long text, only text and paragraph breaks
- **More customization options will be added in the upcoming months**

Editing Your Address Database

You can upload an Excel file (XLSX, XLS or CSV) of your client list to populate your newsletter mailing list. Your Excel file should have **at least** a first name, last name, address, city and state fields. Additional fields can be contained within the file, but they will be ignored.

To upload or customize your address list, click the My Addresses link.

My Addresses



The screenshot shows a web interface titled "My Addresses". At the top, there are two green buttons: "Upload New Address Database (Excel File)" and "Add Single Address". Below these buttons is a table with the following columns: First, Last, Address, City, State, Zip, and Actions. The table contains eight rows of client data, each with "Edit" and "Delete" buttons in the Actions column.

First	Last	Address	City	State	Zip	Actions
Michelle	Bosse	2214 E Sharp Ave	Spokane	WA	99202	Edit Delete
Anthony & Ann	Dituri	953 E 13th Ave	Spokane	WA	99202	Edit Delete
Dan & Jennilee	Flock	15118 N Chronicle Rd	Mead	WA	99021	Edit Delete
Lionel	Franklin	12213 E Tallman Rd	Chattaroy	WA	99003	Edit Delete
Tom	Hamming	1368 W Wabash Ave	Spokane	WA	99205	Edit Delete
Arnold & Gloria	Melnikoff	5317 N Elton Rd	Spokane	WA	99212	Edit Delete
John & Kristi	Morrell	8106 N Pamela St	Spokane	WA	99208	Edit Delete
Tee	Mu	1905 Sir James Dr	Salt Lake City	UT	84116	Edit Delete

If you have already uploaded your mailing list (or a member of the CBT or Lawton staff has done so) you will see a listing of your clients with the option to edit and delete them individually. If you have not yet uploaded a mailing list, or, would like to replace your current mailing list, click the **Upload New Address Database** button.

Uploading New Address Database

After clicking the **Upload New Address Database** button, you will be given a screen to select a file from your computer.

Address Database Upload – Step 1

Upload Address Database

Select Address Excel File (XLS, XLSX or CSV)
[Template.xls](#)
Excel files must have 1 sheet only

Browse... No file selected.

Cancel Upload File

Click the **Browse** button and you will be able to browse your computer for your client address list.

Once you find the file, click **Upload** and your file will be sent to the server. The server will convert the file and send you to a page (Step 2) where you'll need to assign the columns in your Excel document to the fields in the Newsletter fields using simple drop-down boxes.

Address Database Upload - Step 2 – Matching Fields

Field #9 -	Field #10 -	Field #11 -	Field #12 -	Field #13 -	Field #14 -	Field
Select One For Each Field	Select One For Each Field	Select One For Each Field	Select One For Each Field	Select One For Each Field	Select One For Each Field	Select One For Each Field
First	Heimgartner	911 Magnolia St	Lewiston	ID	83501	
Last	Shanley	1548 E Jabbra Ave	Coeur d'Alene	ID	83815	
Address 1	Froehlich	2376 W Evening Star	Post Falls	ID	83854	
Address 2	John Demakas	21441 N Circle	Rathdrum	ID	83858	
City	Robbins	7546 State Route 155	Omak	WA	98841	
State	Moore	26017 N Chattaroy Circle	Chattaroy	WA	99003	
Zip	Labish	1105 S Mullinix	Cheney	WA	99004	
Jim	McDowell	1513 5th St	Cheney	WA	99004	
Tim & Debi	Legans	2240 Hillside Dr	Cheney	WA	99004	
Michael & Theresa	Stookey	16429 N Greenbluff Rd	Colbert	WA	99005	
Shan & Tatjana						
Ray & Sue						

If your spreadsheet contained additional fields that aren't necessary for the newsletter system, they will appear on this screen, but you do not need to assign a newsletter field to them. For the first, last, address, city, state, and zip fields, you'll need to select the appropriate newsletter field from the drop-down option at the top of the column.

Once you have matched your Excel fields to the newsletter fields, click the **Process List** button at the bottom of the page and your address list will be populated.

From this point on, you can either manually add, edit, and delete addresses individually, or, upload an entirely new address database.

Be aware that uploading a new address database will erase your old address database.

Feedback and Help

If you need assistance with the system, please contact your office staff who will direct you to more help. You can also email support@cbtnewsletter.com for assistance.

As with any new system, we anticipate revisions to the system as we get feedback from agents and administrators. Feel free to forward any feedback to support@cbtnewsletter.com.