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Designer Tool - Editing Flyers



12/20/01 Version 1.0

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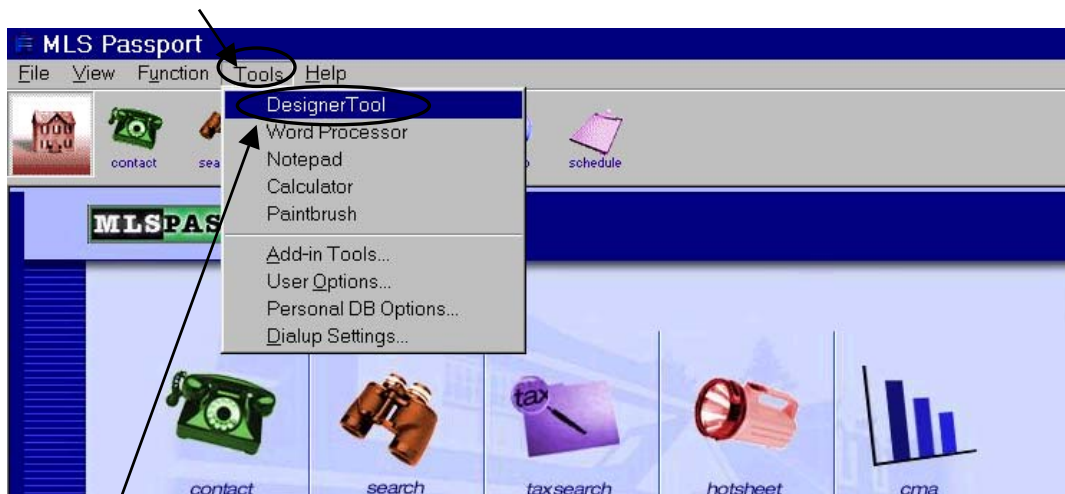
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OPENING DESIGNER TOOL

Designer Tool allows you to create or edit your own flyer templates to be used in Passport. Once you create and save a flyer template in Designer Tool, it can be used as often as you would like from Passport.

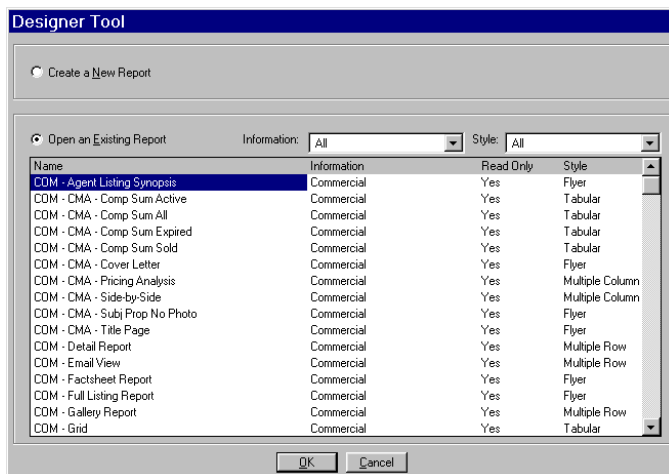
TO OPEN DESIGNER TOOL:

1. LOGIN TO PASSPORT (*Designer Tool can be opened from within Passport*).
2. Click TOOLS (*from the menu bar in Passport*).



3. Click DESIGNER TOOL.

Wait for the Designer Tool window to open.



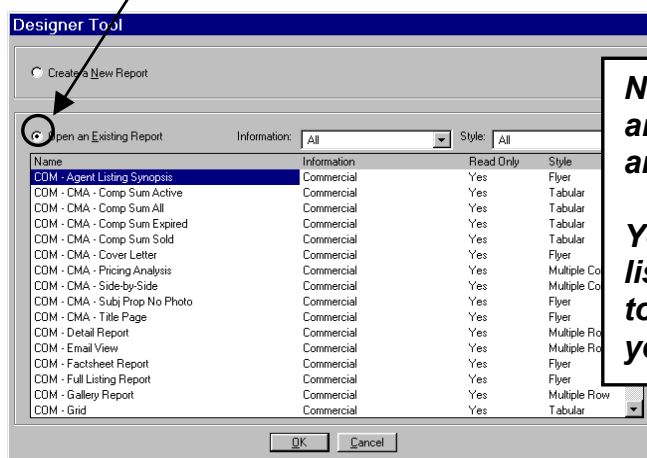
COPYING A PASSPORT FLYER TEMPLATE

Once Designer Tool is open, you can choose to either create a new flyer or edit an existing flyer template. In most cases, it is much faster and easier to edit an existing flyer template rather than create a new flyer from scratch.

This class will focus on editing an existing flyer template. To do this, you will need to locate the flyer you wish to edit and make a copy of it. This process is explained in detail below.

TO COPY A PASSPORT FLYER TEMPLATE:

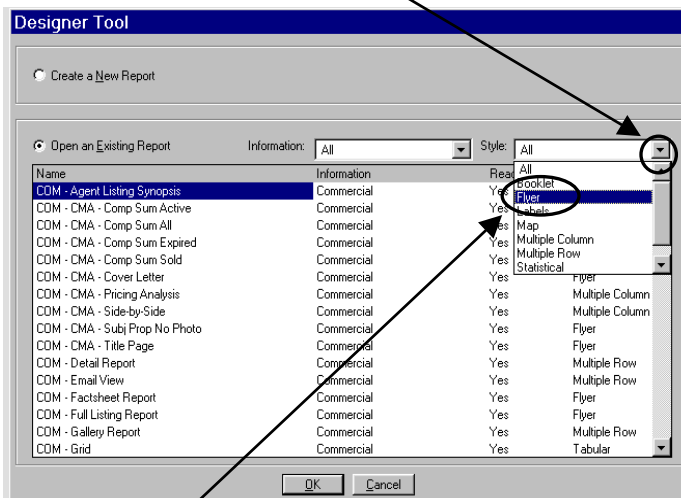
1. **OPEN** Designer Tool *(if necessary)*.
2. Make sure **OPEN AN EXISTING REPORT** is selected.



Notice ALL of the flyers and reports in Passport are listed.

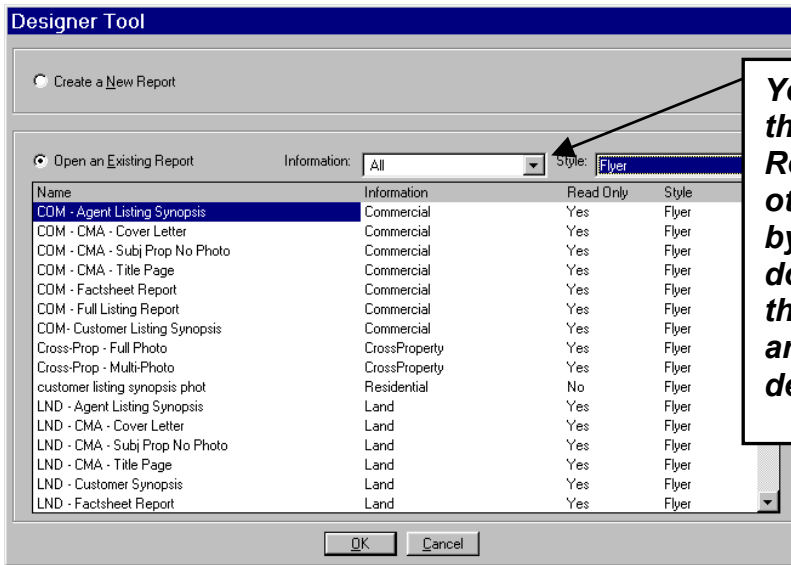
You can narrow this listing down to just flyers to make locating the flyer you wish to copy easier.

3. Click **DROP-DOWN ARROW** next to **STYLE**.



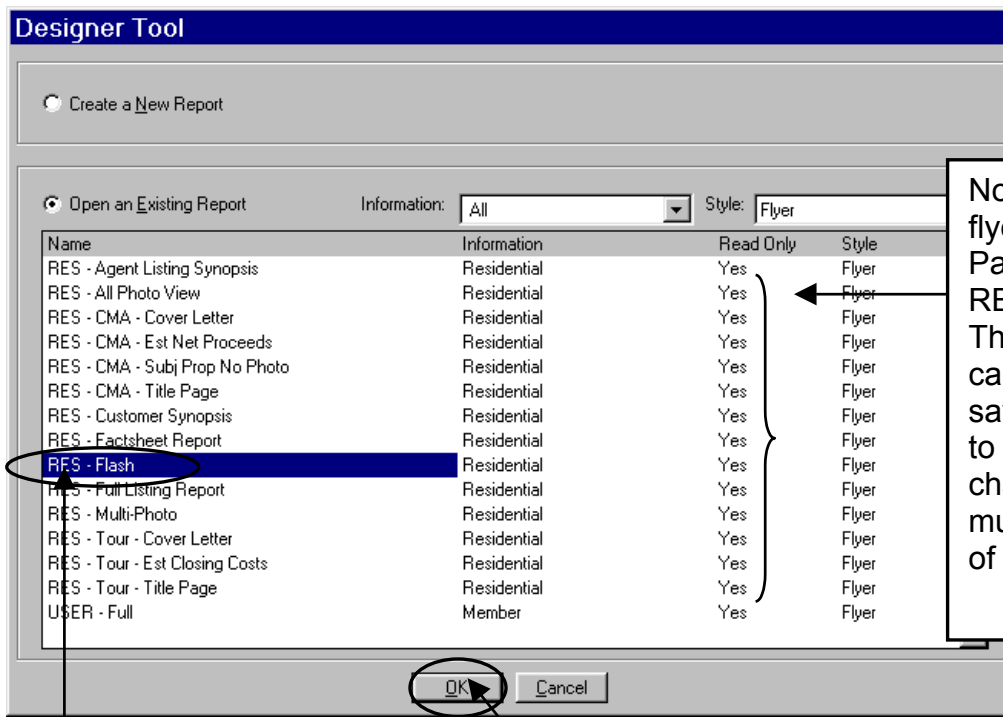
4. Click **FLYER**.

Now only the flyers will be displayed.



You can also narrow this list down to Residential flyers or other property types by clicking the drop-down arrow next to the Information box and selecting the desired property type.

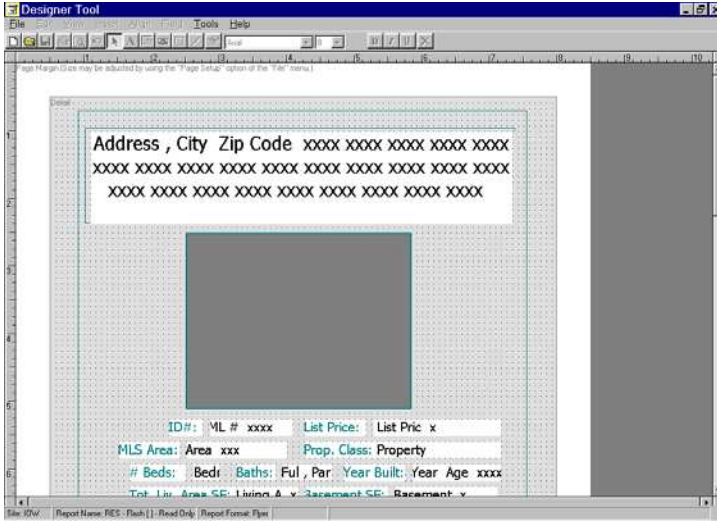
5. LOCATE THE FLYER you wish to copy (don't forget to scroll down).



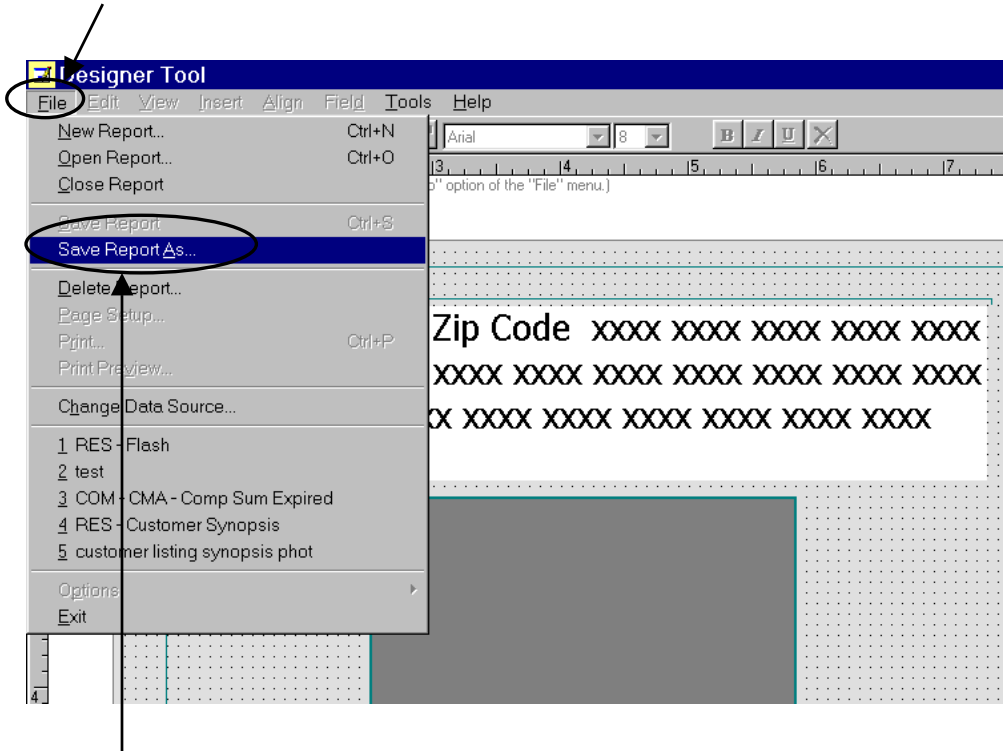
Notice that the flyers from Passport are READ ONLY. This means you cannot make or save any changes to them. To save changes, you must make a copy of them first.

6. CLICK ONCE on the flyer and click **OK**.

The flyer template will open.

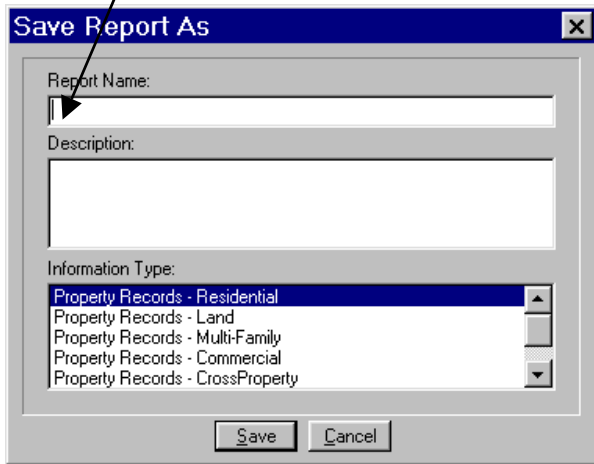


7. Click **FILE** menu.

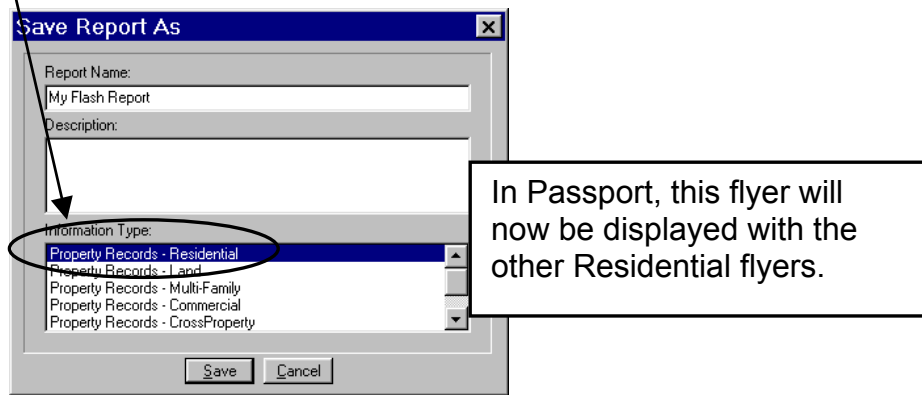


8. Click **SAVE REPORT AS.**

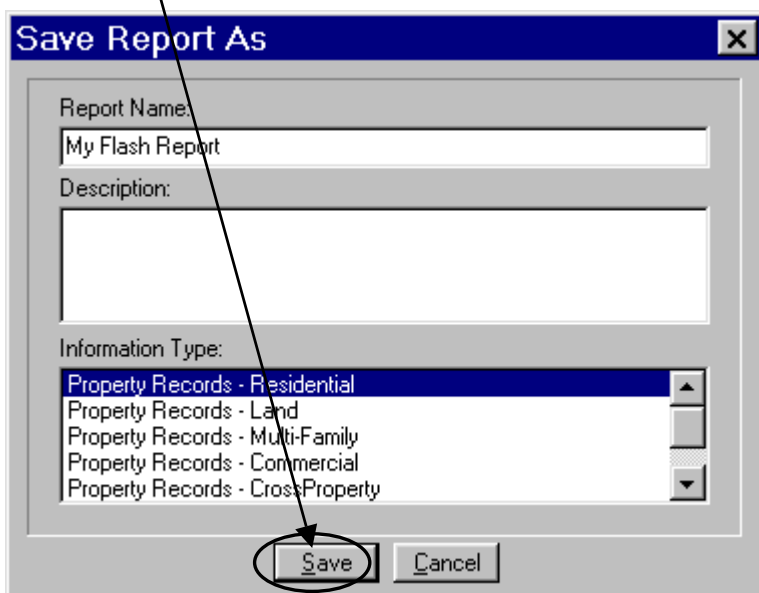
9. Type a **NAME** for this flyer (*whatever makes sense to you*).



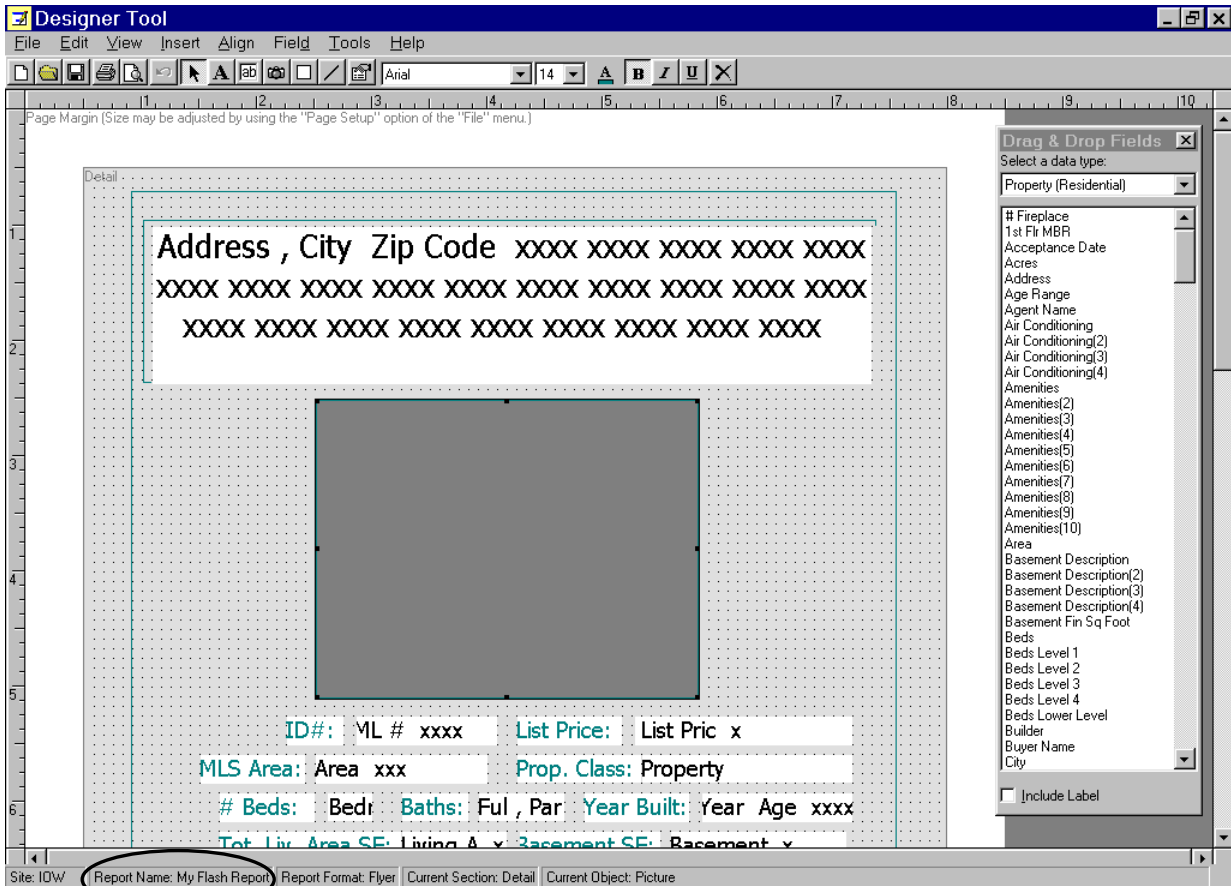
10. **CLICK ONCE** on the category you would like this flyer **SAVED IN**.



11. Click **SAVE**.



The flyer has now been copied and is ready for editing.

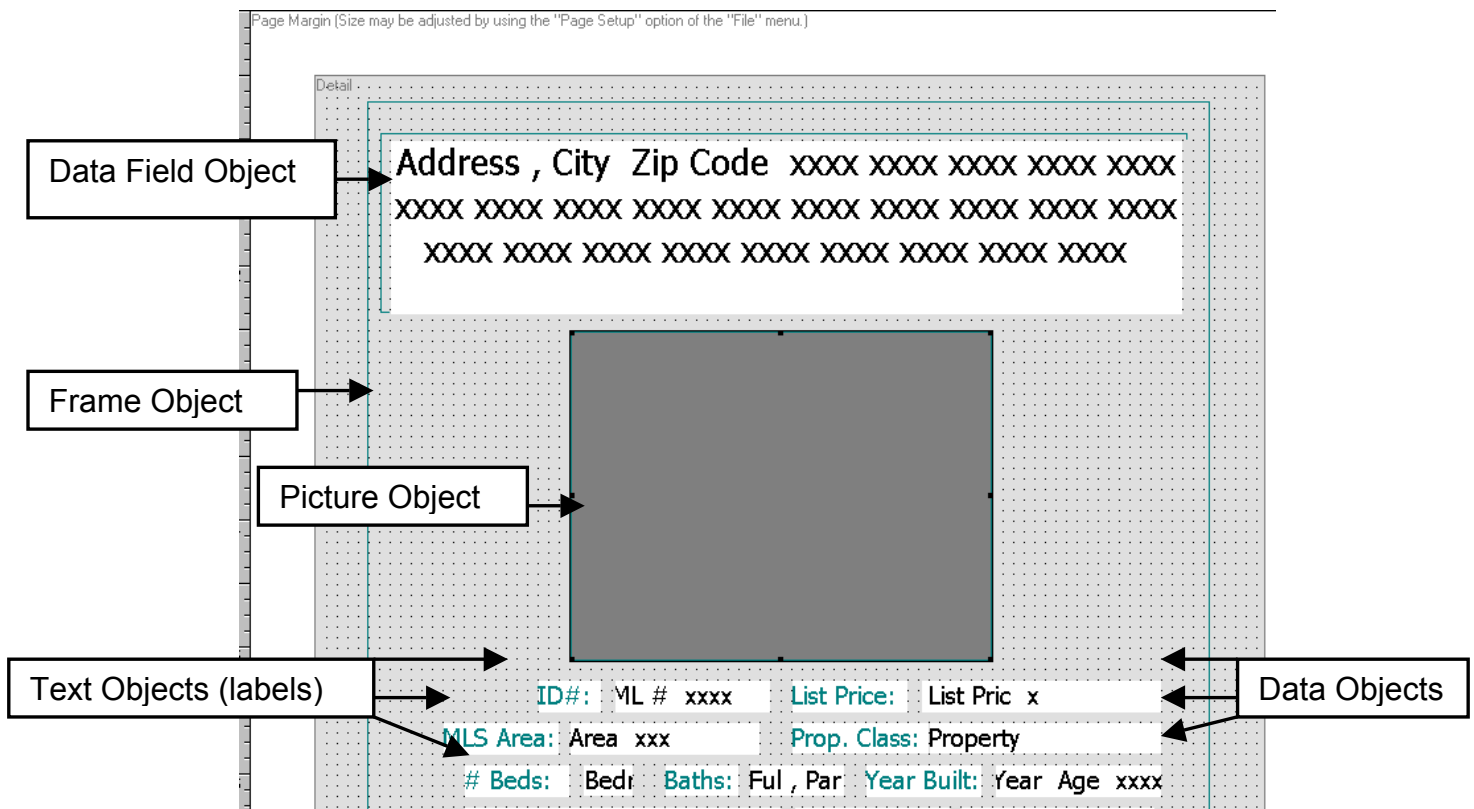


TIP: If you are not sure which flyer you are working with, look for its name on the status bar at the bottom of the screen.

WORKING WITH OBJECTS

In order to edit templates, you must know how to work with objects. The flyer itself is considered an object, but so is everything on the flyer. The background, borders, text fields, photos, etc. are all considered objects.

FLYER OBJECT EXAMPLES



DATA OBJECTS are essentially placeholders for the information that will be displayed from T-III. For example, the Data Object at the top of this flyer will display the address, city, and zip code for the property once you are in Passport and choose this flyer for your property.

TEXT OBJECTS are primarily used as labels for data objects. For example, the ID# text object is the label that will appear next to the property's MLS number. ID# 134523 - ID# is the text object (label) and 134523 is the data object that will be brought in from T-III. You can also use text objects if you want to type text on a flyer.

PICTURE OBJECTS will display the property photo if the property has a photo in T-III.

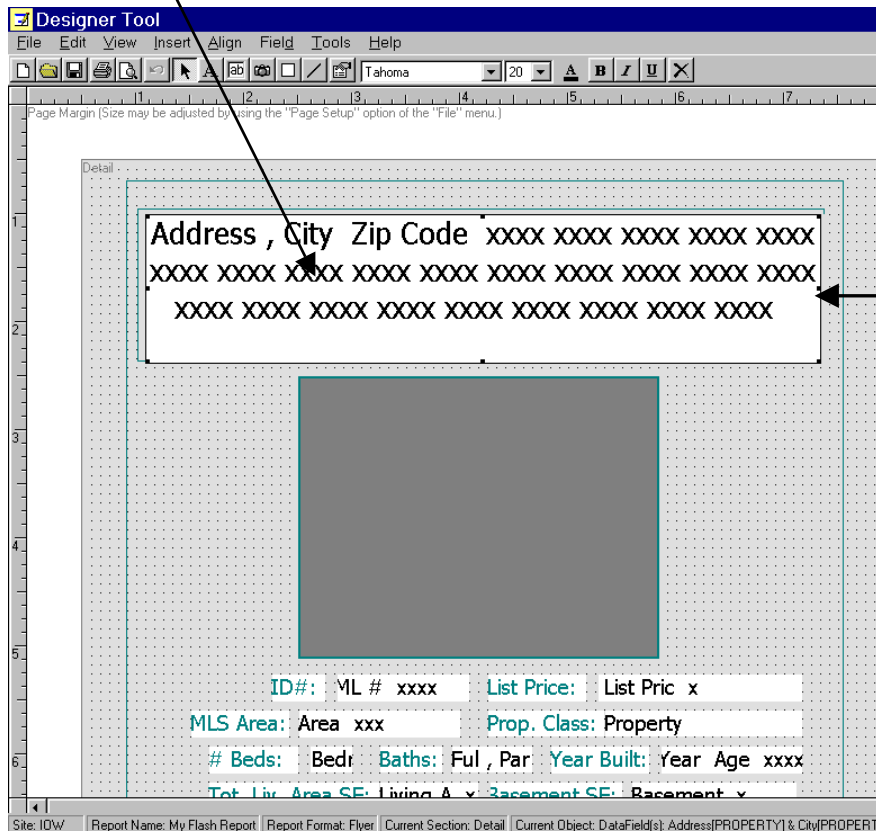
FRAME OBJECTS are usually borders that will display on the flyer.

SELECTING OBJECTS

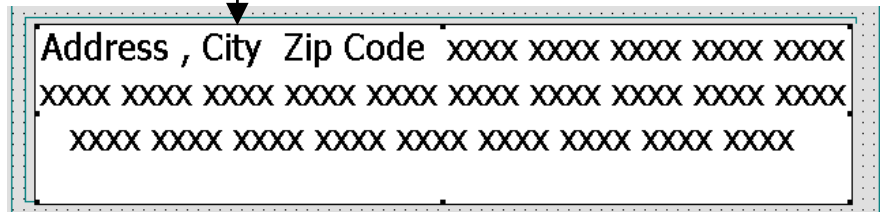
To work with an object, you must select it first. Once it is selected, you can move it, resize it, or delete it.

TO SELECT AN OBJECT:

1. **CLICK ONCE** on TOP of the object you want to select.



Make sure that a black border with squares now appears around the outside of the object.

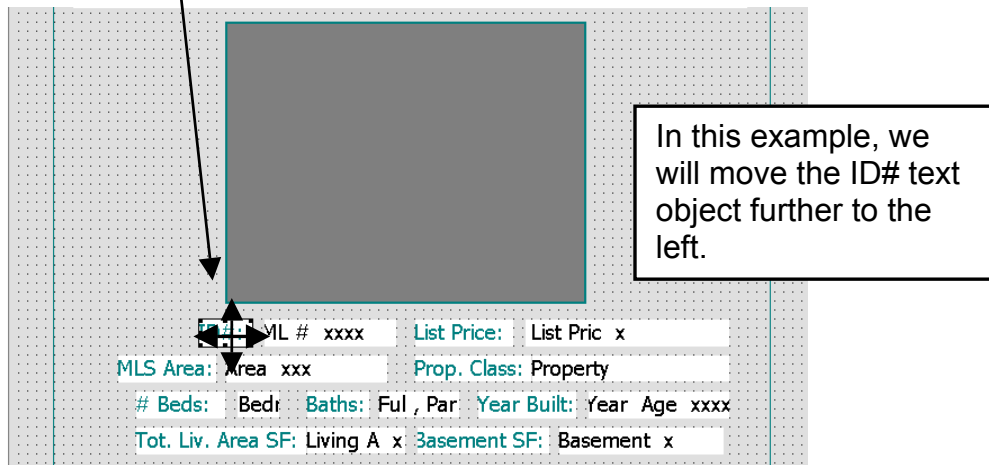


MOVING OBJECTS

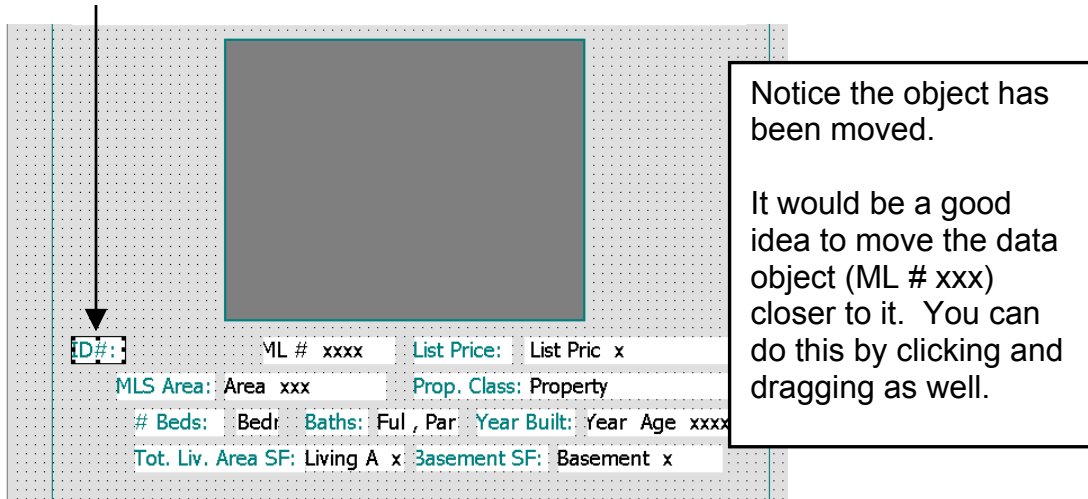
Once an object is selected it can be moved to another position on the flyer. To move an object you will need to select it first and then click and drag it to its new location.

TO MOVE AN OBJECT:

1. **SELECT THE OBJECT** you want to move.
2. Place pointer **ON TOP OF THE OBJECT** (*your pointer should change to a cross*).



3. **CLICK AND DRAG** the object to the desired position and **LET GO**.

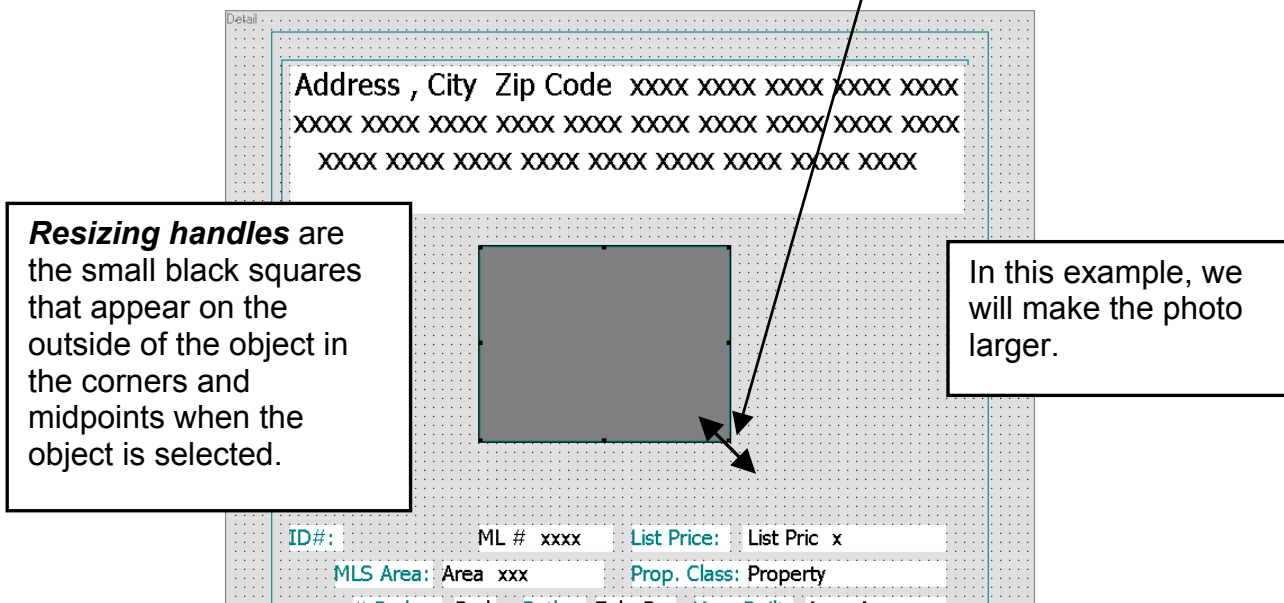


RESIZING OBJECTS

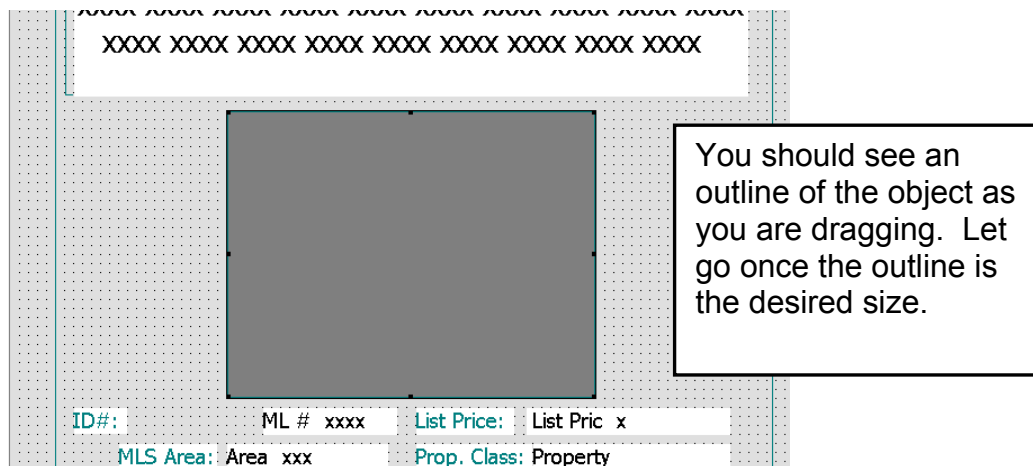
Most objects can be made smaller or larger by resizing. To resize an object, you must select it first and then point to one of its *resizing handles*. You will want to use a resizing handle that is located in the corner of the object to avoid distorting it.

TO RESIZE AN OBJECT:

1. **SELECT THE OBJECT** you want to resize.
2. Place **POINTER ON TOP** of a **CORNER RESIZING HANDLE** (*your pointer should change to a double-headed arrow*).



3. **CLICK AND DRAG** to the desired size and **LET GO**.

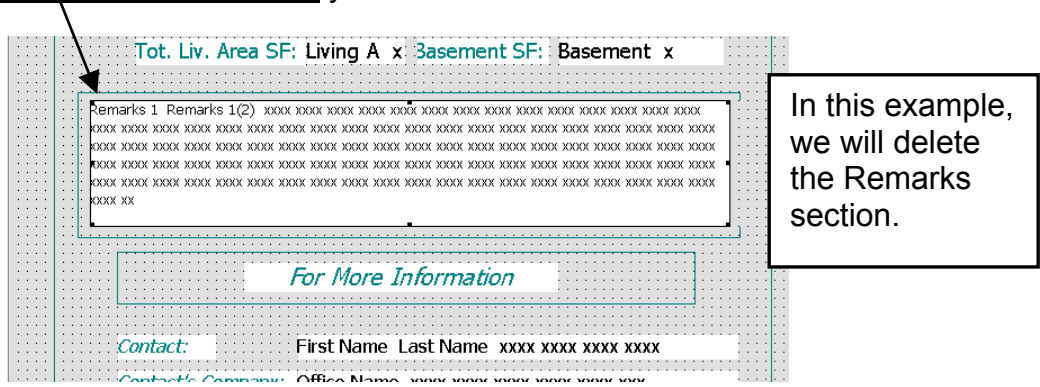


DELETING OBJECTS

You can delete most objects on a flyer by selecting them and pressing the delete key on your keyboard.

TO DELETE AN OBJECT:

1. SELECT THE OBJECT you want to delete.



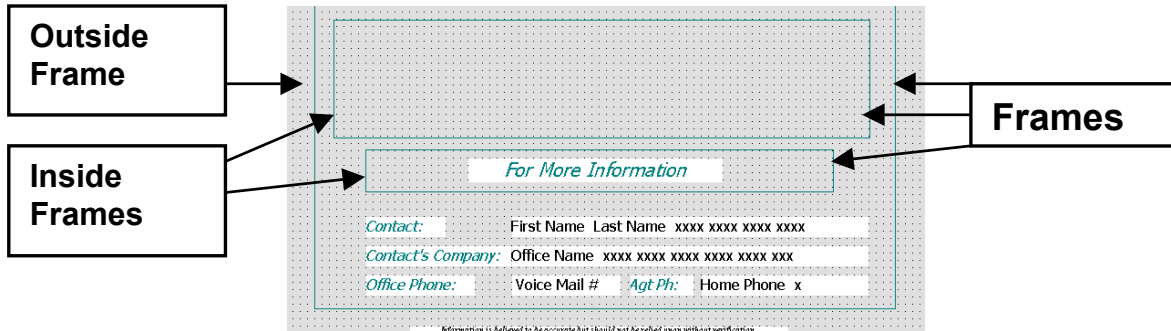
2. PRESS DELETE on your keyboard.

Notice the remarks have been removed, but the frame around the remarks is still there. Working with frames is covered on the following page.

WORKING WITH FRAME OBJECTS

Frames are borders that appear on many of the flyers in Passport that you will be working with. You can add frames, format them, or delete them.

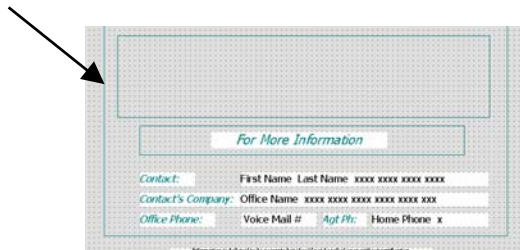
You need to select the frame before you can work with it. Some frames are easier to select than others. If you have a frame inside of a frame, it can get tricky.



For example, if you have a frame inside of a frame and you want to remove the outside frame, just select it and press delete. However, if you want to keep the outside frame, but remove the inside frame, the program may not let you select the inside frame while you still have an outside frame. In this situation, you can select the outside frame and CUT it. Then you will be able to select the inside frame and delete it. Once the inside frame is deleted, you can PASTE the outside frame back to the flyer.

TO SELECT AN OUTSIDE FRAME:

1. CLICK ONCE on the frame.



The frame should now appear black with resizing handles meaning it is selected.



TO SELECT AN INSIDE FRAME:

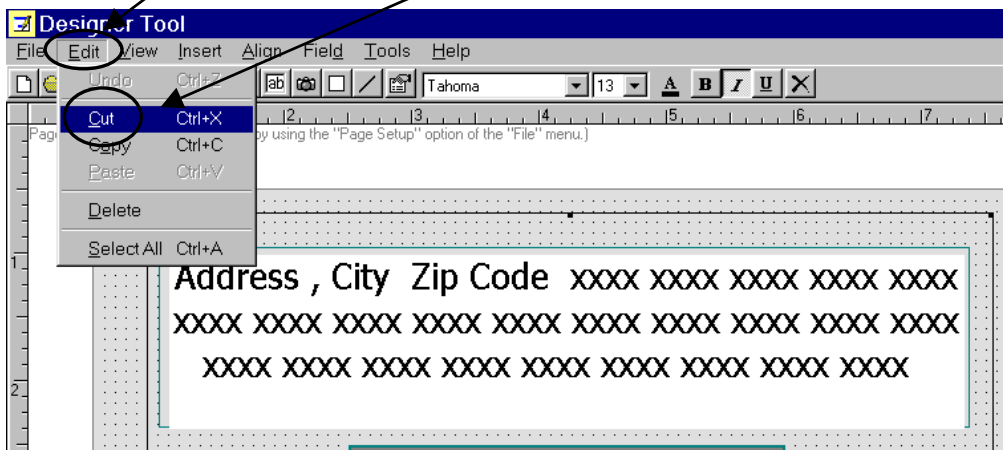
If you need to select a frame that is inside of a frame, try clicking on it to select it. If you are unable to select it, you will need to try the steps below.

IF YOU ARE UNABLE TO SELECT AN INSIDE FRAME:

1. **CLICK ONCE** on the **OUTSIDE** frame (to select it).

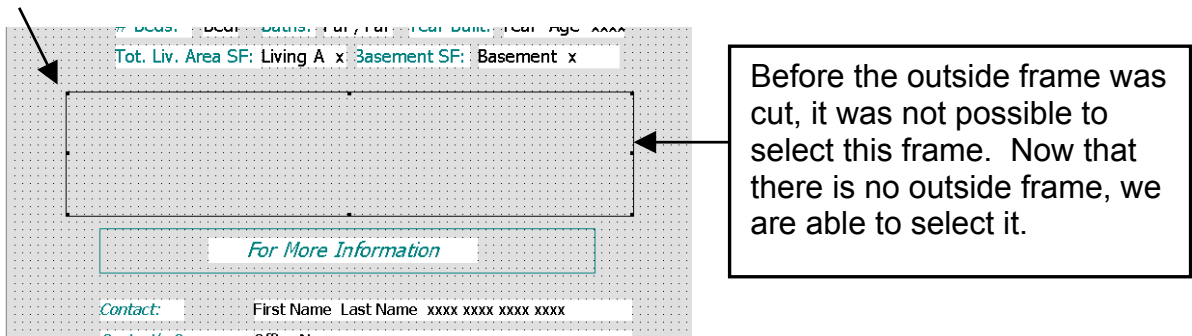


2. Click the **EDIT** menu and click **CUT**.

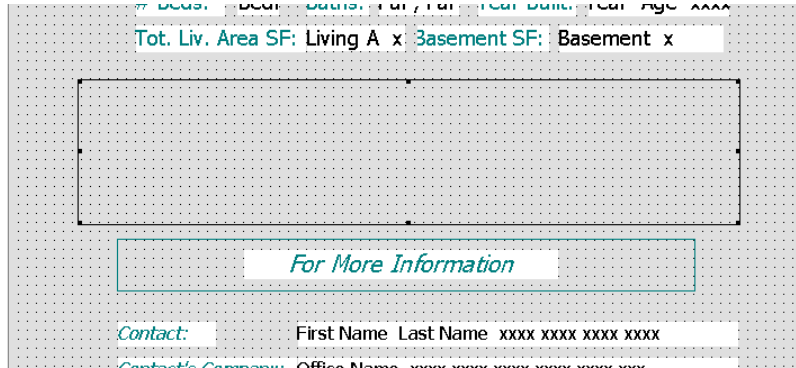


The outside frame should disappear (it will actually be on the clipboard).

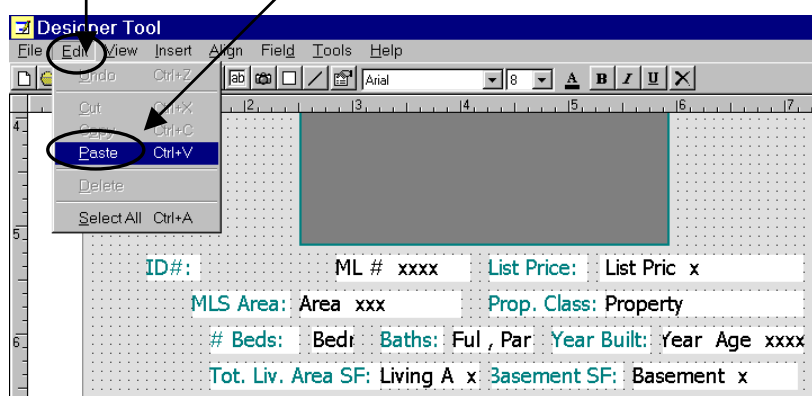
3. **CLICK ONCE** on the frame you want to work with to select it.



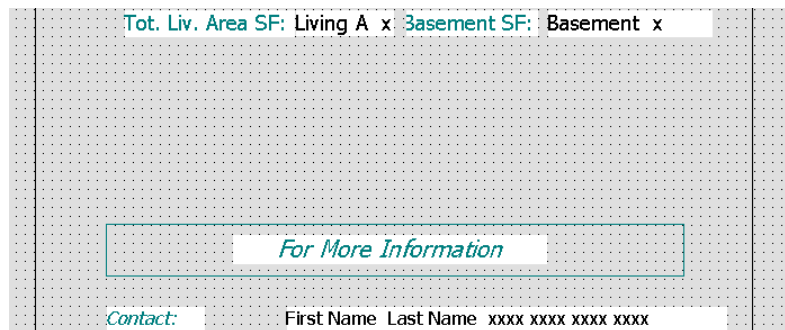
Now that this frame is selected, you can work with it. Once you are finished, you will need to paste the outside frame back to the flyer.



4. Click **EDIT** then click **PASTE** (to bring back the outside frame).

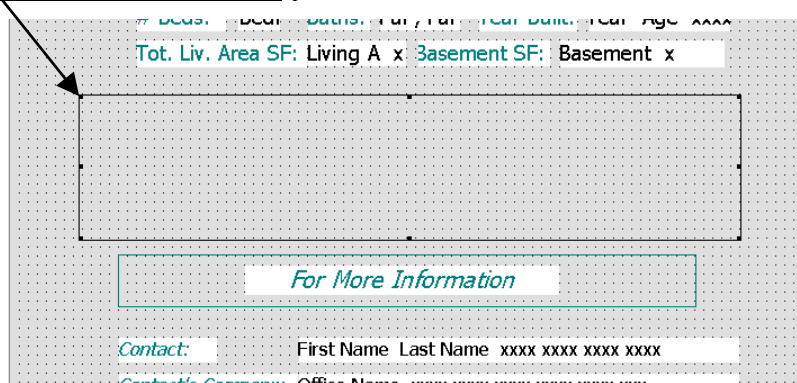


The outside frame should return to its original position.



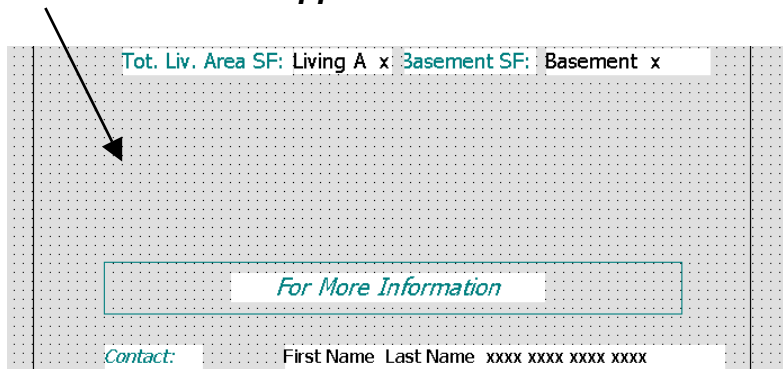
TO REMOVE A FRAME:

1. **SELECT THE FRAME** you wish to remove / delete.



2. **PRESS DELETE** on your *keyboard*.

The frame should disappear.



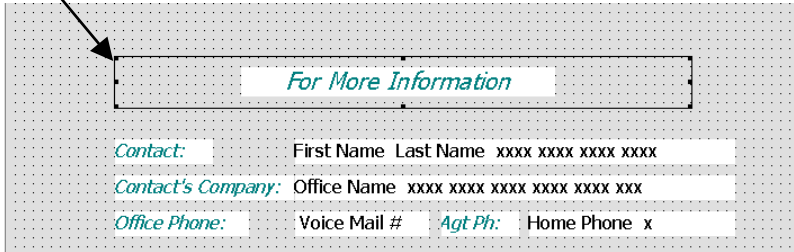
NOTE: If you are having problems selecting a frame, go to page 13.

FORMATTING FRAMES

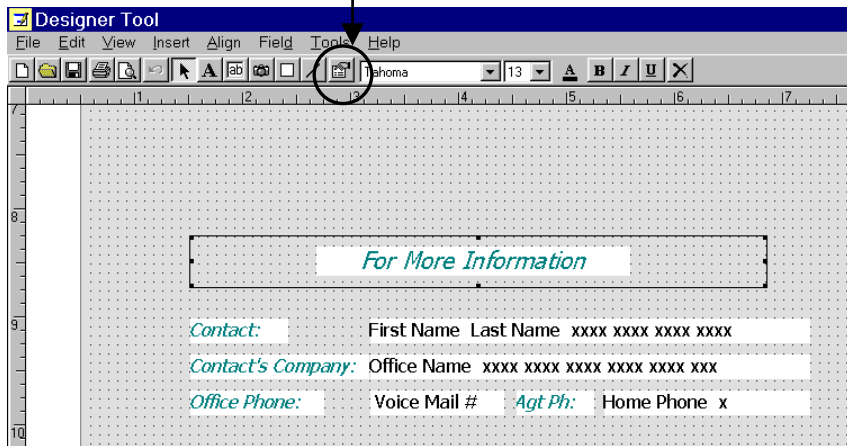
You can change the frame color by going to its properties. You must select the frame before you can make any changes.

TO CHANGE THE FRAME COLOR:

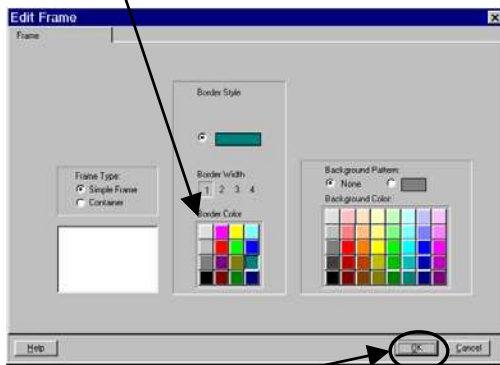
1. **SELECT** the frame.



2. Click the **OBJECT PROPERTIES** button.

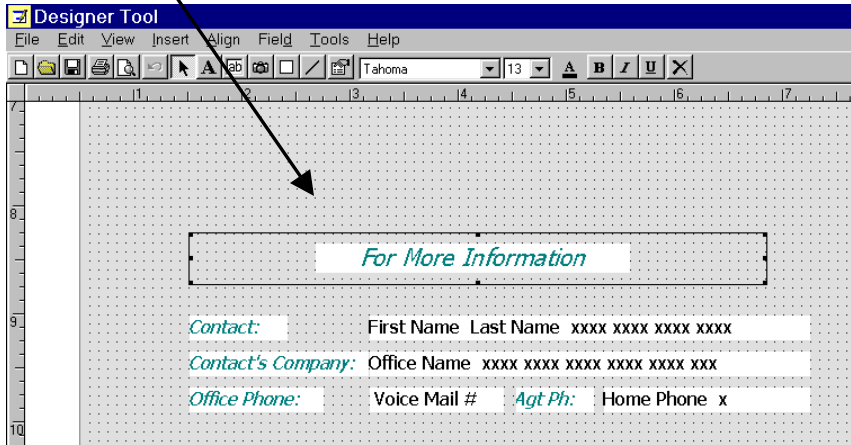


3. **CLICK COLOR** you want to change the frame to.

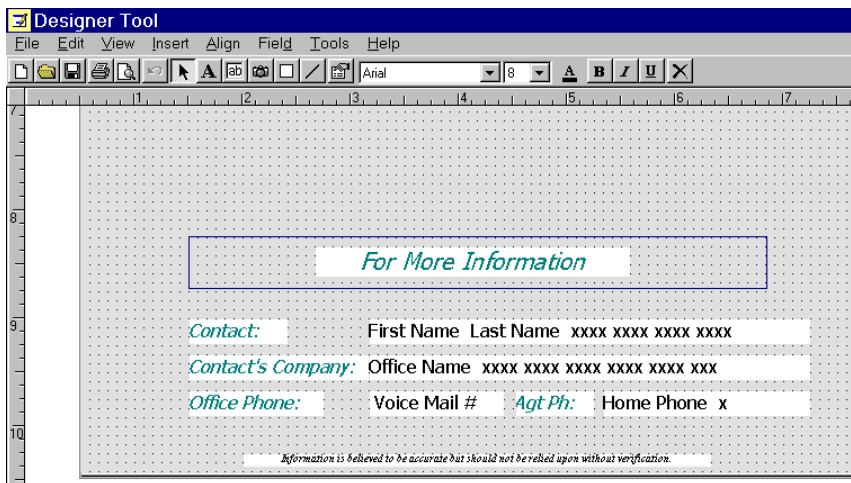


4. Click **OK**.

5. Click **OUTSIDE THE FRAME** to deselect it.



You should now see the frame in the new color.

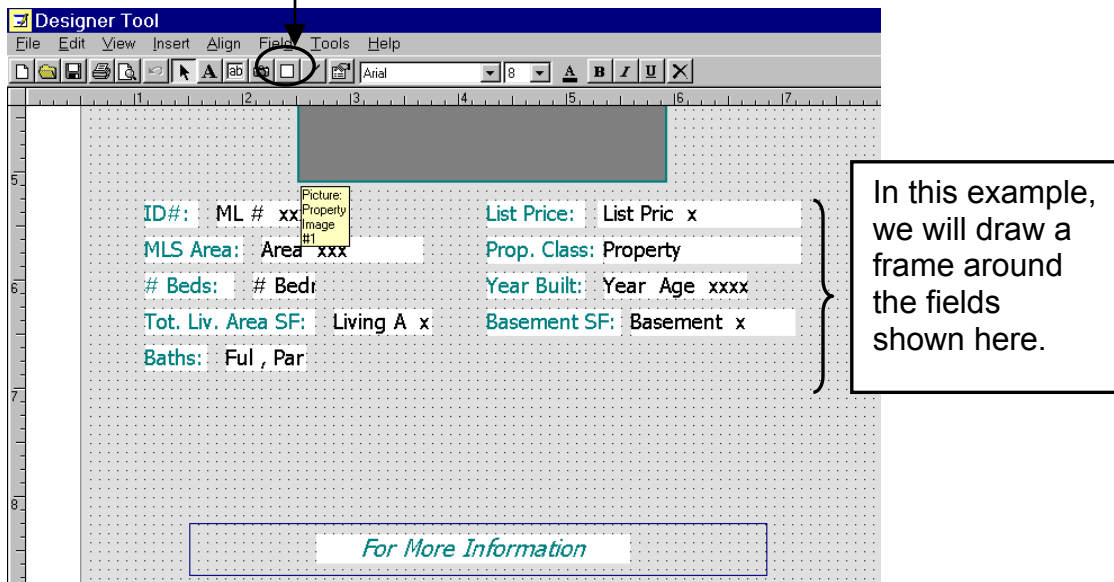


ADDING FRAMES

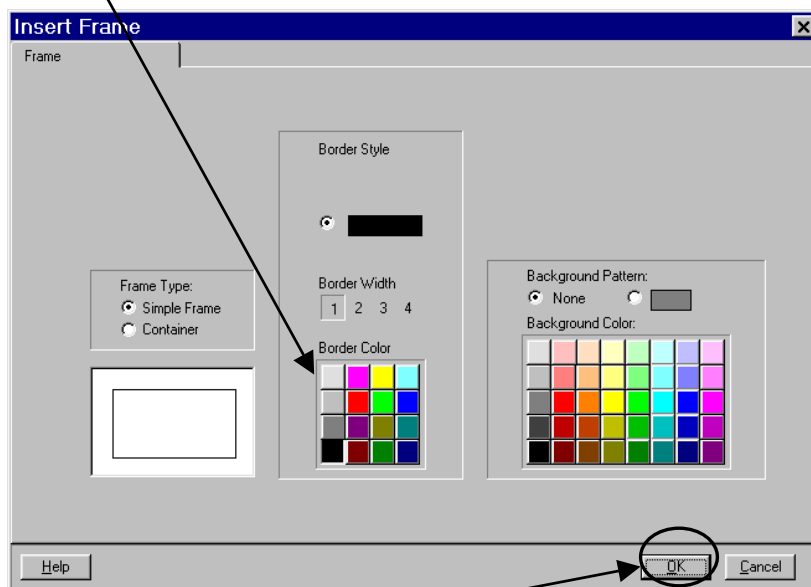
You can add a frame around a photo or text.

TO ADD A FRAME:

1. Click the **INSERT FRAME** button.

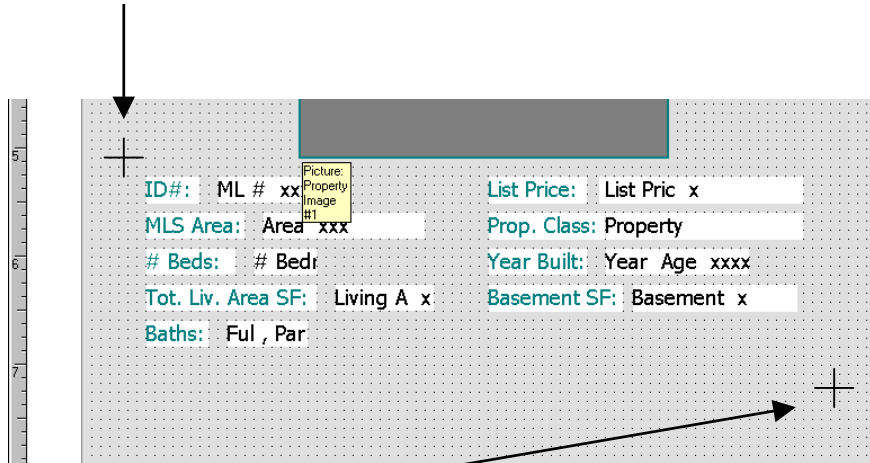


2. **SELECT** the appropriate color and choices below for this frame.



3. Click **OK**.

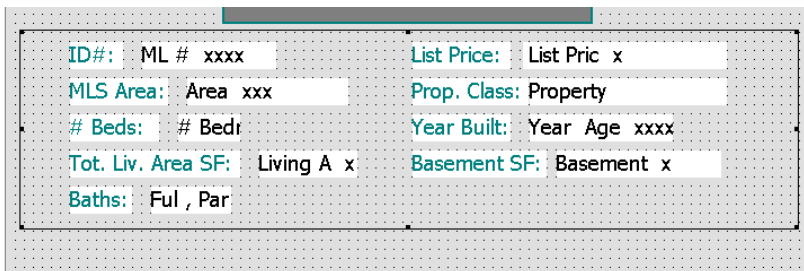
4. PLACE **POINTER** in the **UPPER LEFT CORNER** for the frame.



5. **CLICK AND DRAG** to **LOWER RIGHT CORNER**.

6. **LET GO** of your mouse.

The frame should now appear.

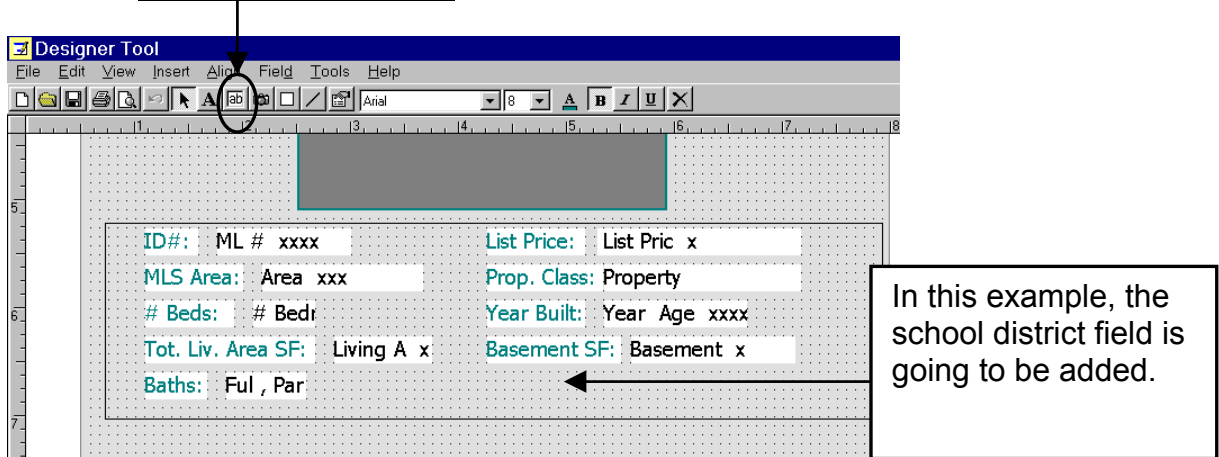


WORKING WITH FIELDS

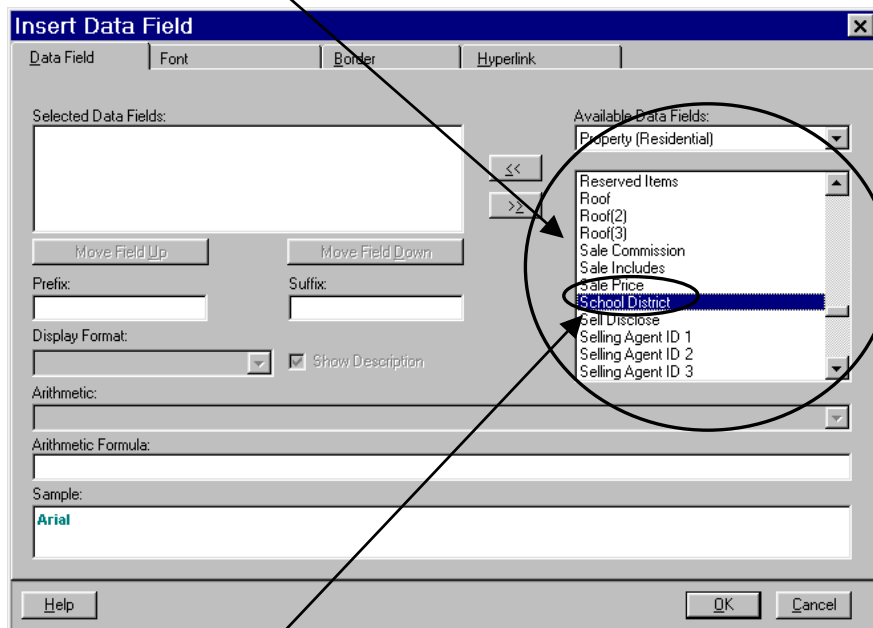
In Designer Tool, there are data fields and text fields. *Data Fields* are placeholders for information that is being imported from T-III. *Text Fields* are either labels for that information or used to add text to a flyer.

TO ADD DATA FIELDS:

1. Click the **INSERT DATA FIELD** button.

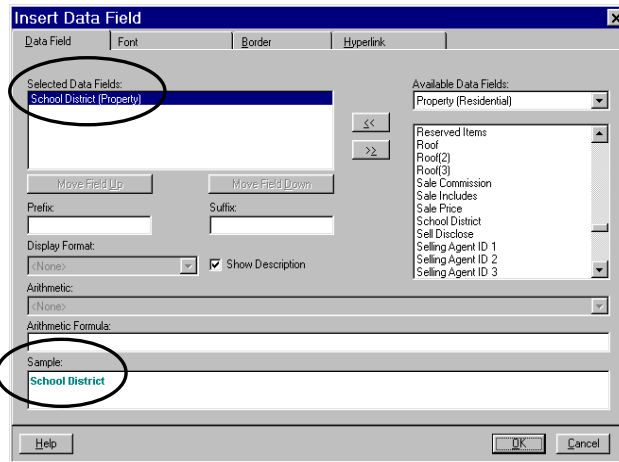


2. **FIND THE FIELD** you want to insert.

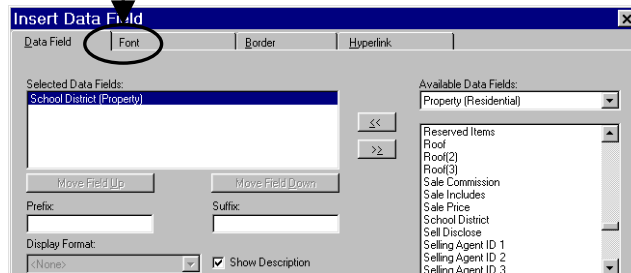


3. **DOUBLE-CLICK** the field.

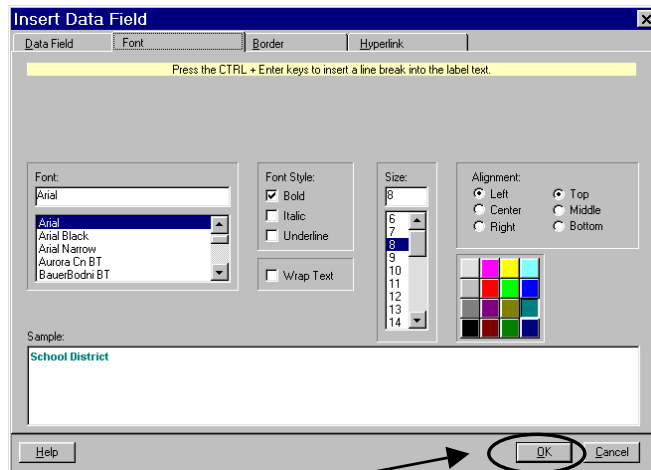
The field will be inserted into the selected data fields box and will preview below.



4. Click the **FONT TAB** (if you need to change the font style, size, or color).

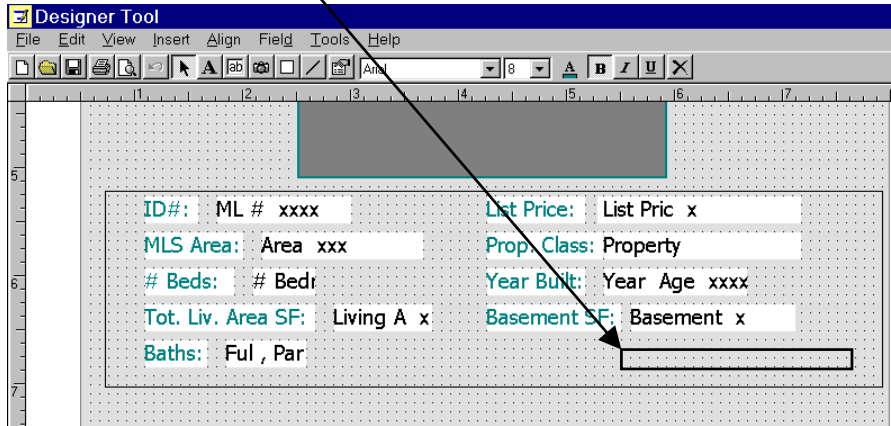


5. Make **FONT CHANGES** (if necessary).

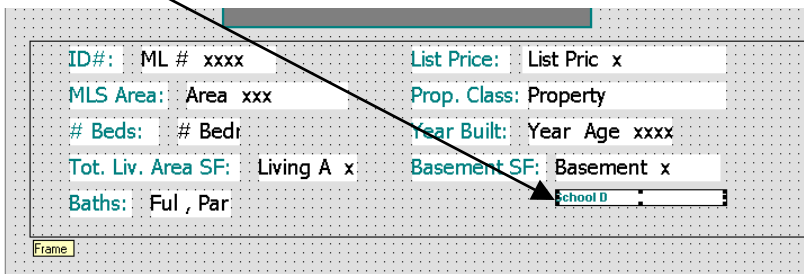


6. Click **OK** when finished.

7. **CLICK AND DRAG** to create a box where you want the field to be positioned.



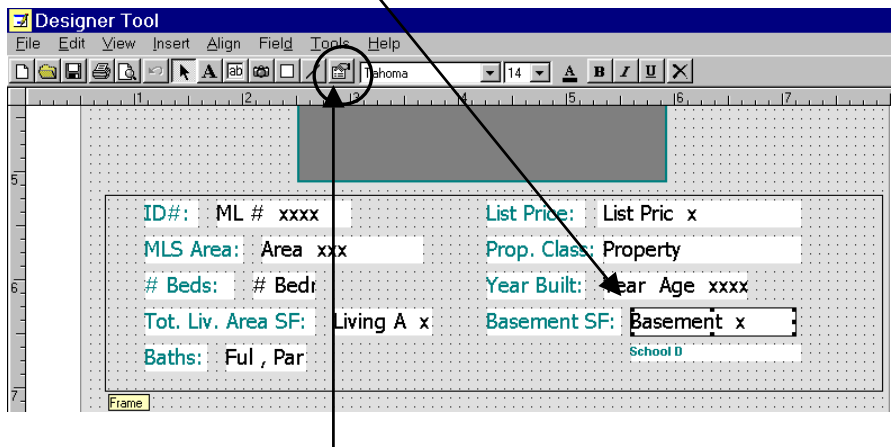
8. **LET GO** of your mouse and the field should appear.



You will probably find it necessary to reformat and resize the field to make it match the others.

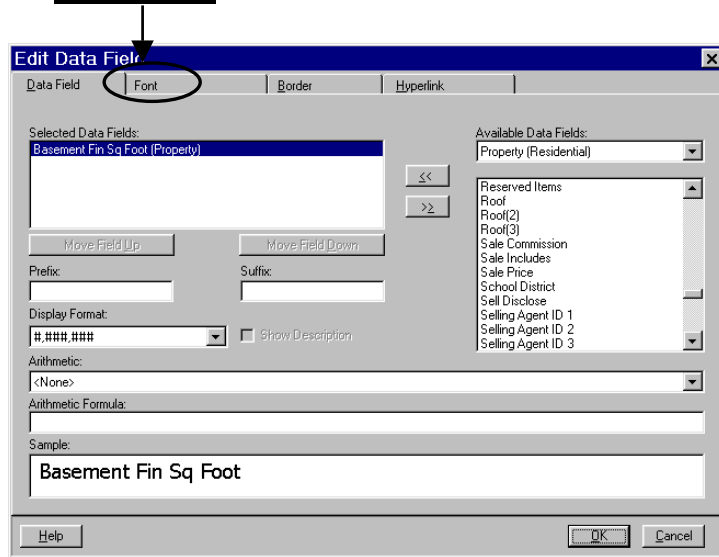
TO MAKE THIS DATA FIELD MATCH THE OTHERS:

1. **SELECT A DATA FIELD** that looks the way you want (ex. Basement).

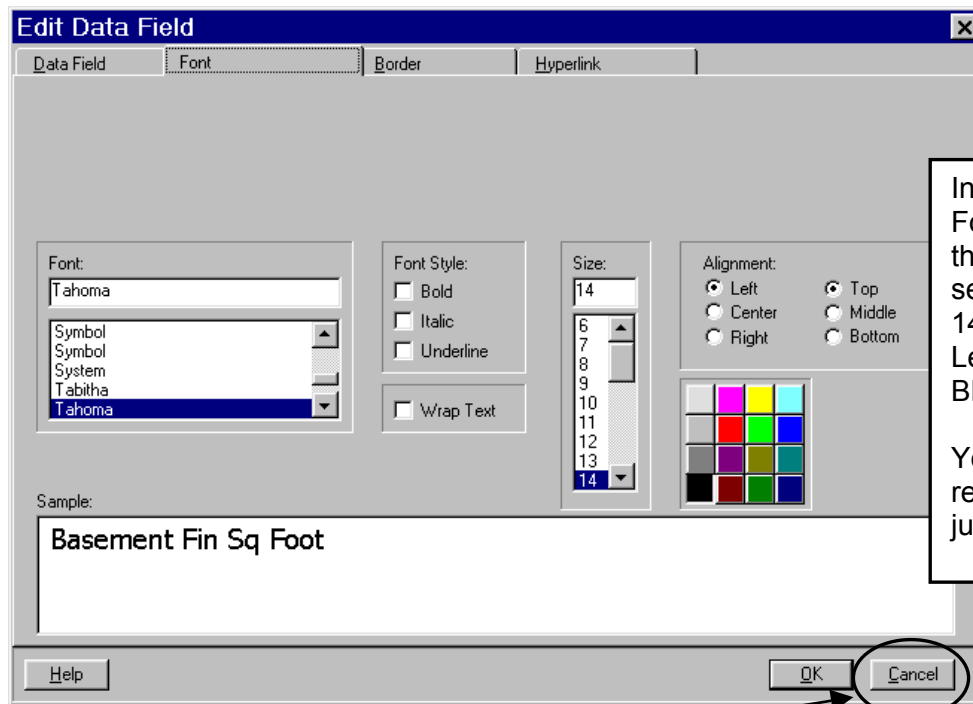


2. Click **OBJECT PROPERTIES** Button.

3. Click **FONT TAB**.

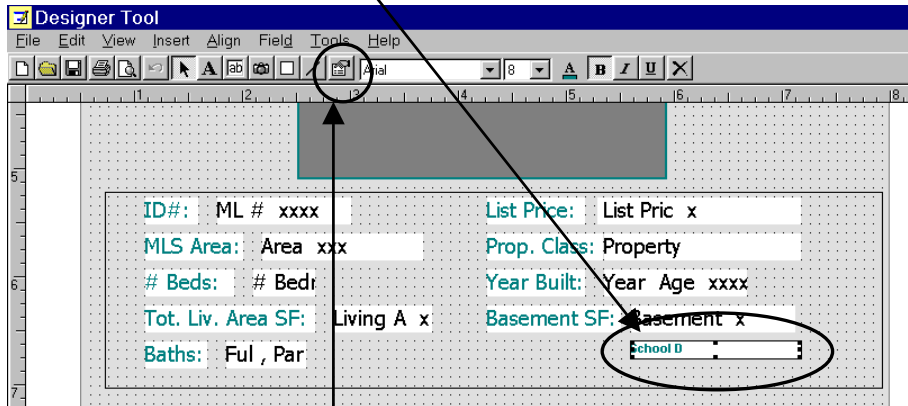


4. **WRITE DOWN THE INFORMATION** so you can reformat your new field the same.



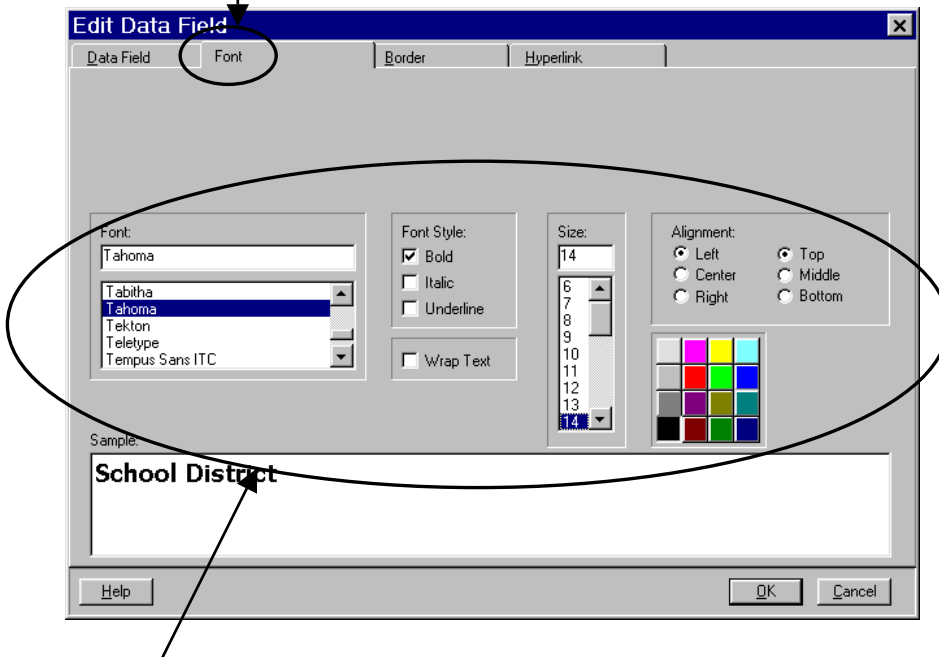
5. Click **CANCEL** when you are finished.

6. **SELECT** the **NEW FIELD**.



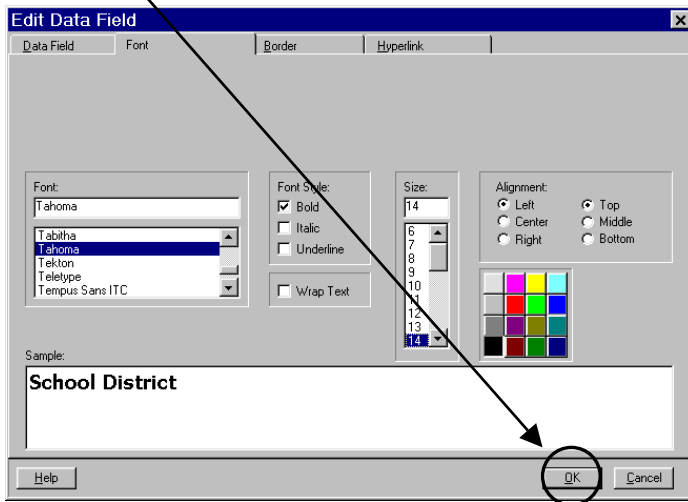
7. Click **OBJECT PROPERTIES** Button.

8. Click **FONT TAB**.

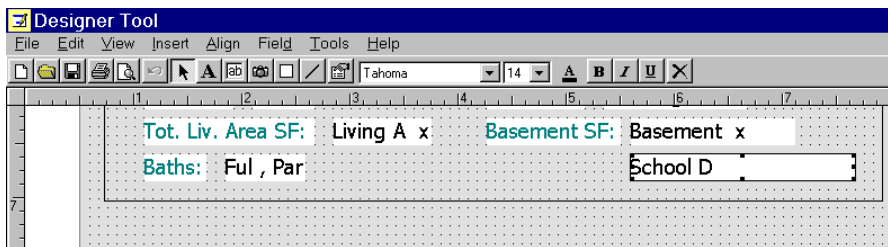


9. **MAKE NECESSARY CHANGES** based on the information you wrote down.

10. Click **OK** when finished.



The data field should now match the others.

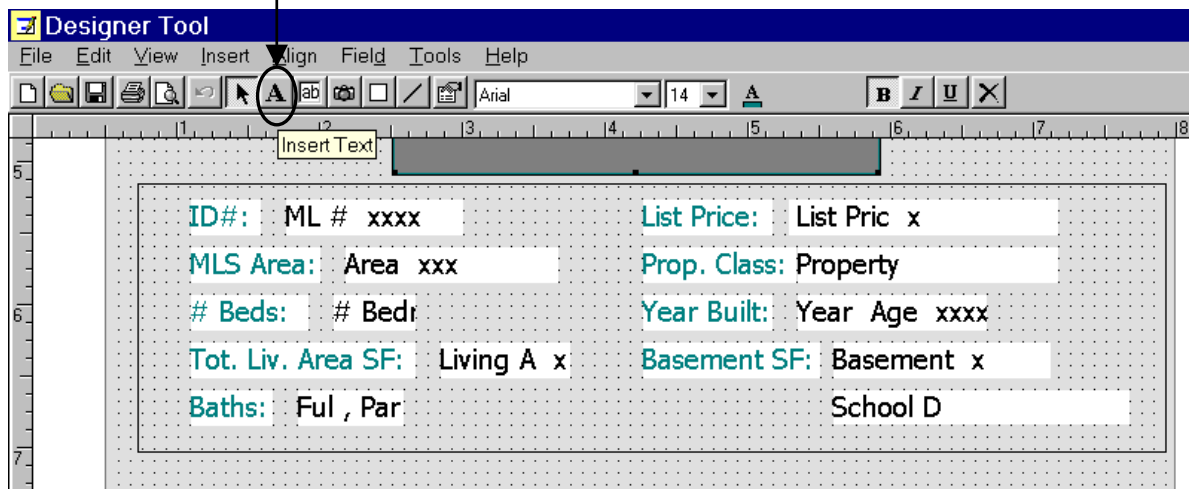


ADDING TEXT FIELDS (LABELS)

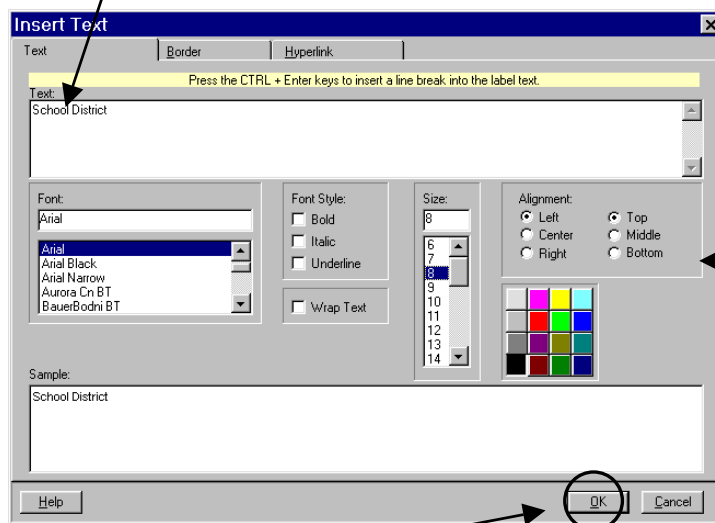
In the School District example, the Data Field for School District has been added, but now we need to add a Text Field or label for this field. Otherwise when this flyer is used in Passport, all that will display is the name of the school district with no label next to it.

TO ADD A TEXT FIELD (LABEL) FOR A DATA FIELD:

1. Click the **INSERT TEXT** Button.



2. Type **TEXT** you want to add (*Ex. School District*).

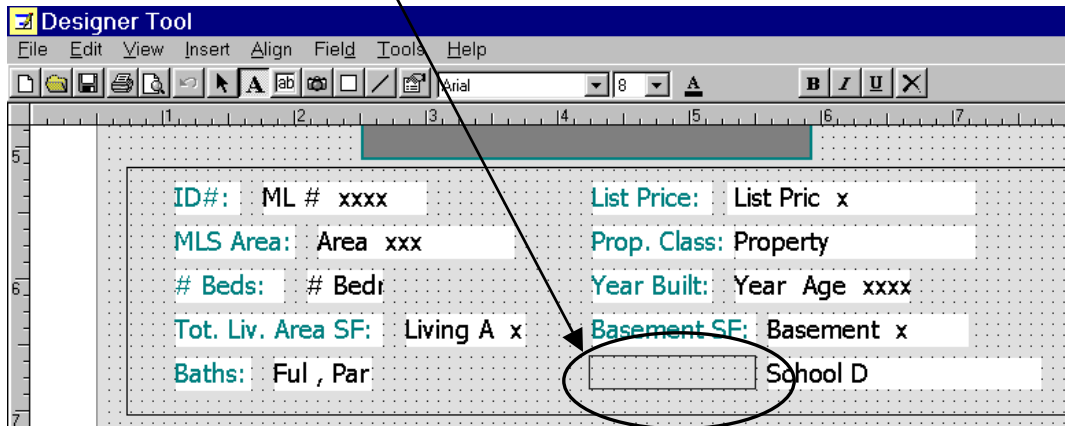


You can make your formatting changes now, or come back to this screen later.

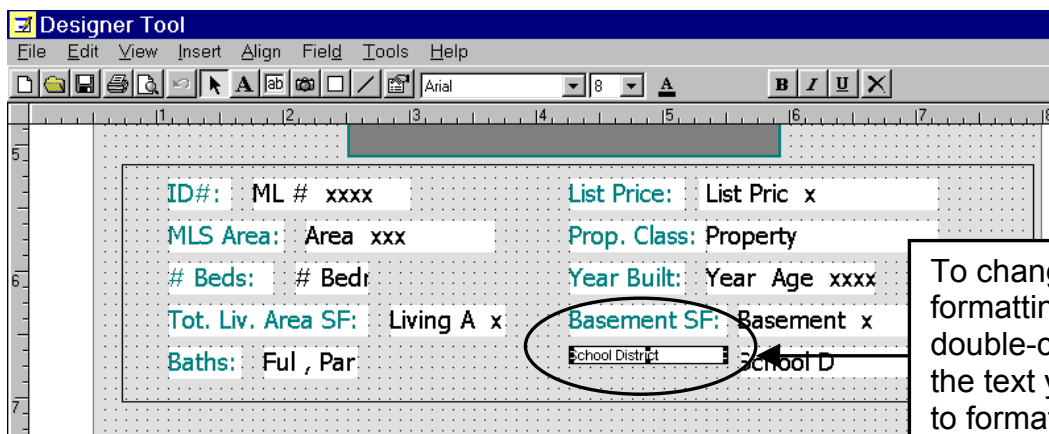
3. Click **OK**.

YOUR POINTER WILL HAVE A CAPITAL LETTER 'A' NEXT TO IT.

4. **CLICK AND DRAG A BOX** representing where you want the label to appear.

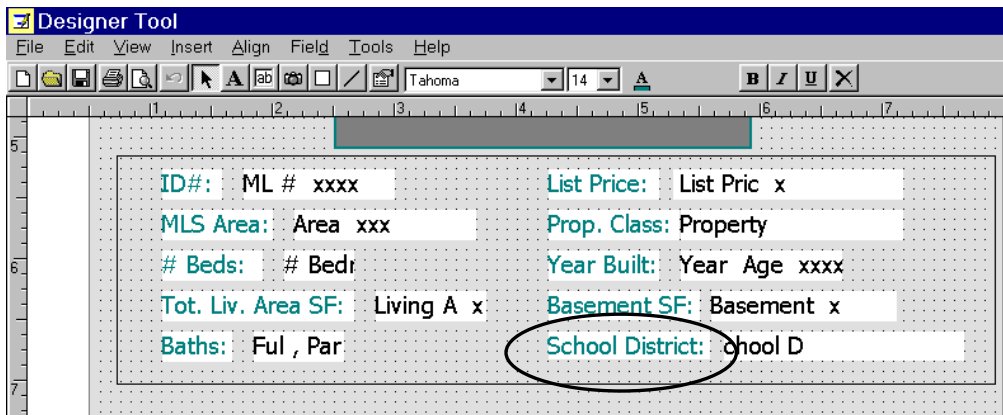


5. **LET GO** of the mouse button and the label should appear.



To change the formatting, just double-click on the text you want to format.

You can now resize and format the new label accordingly.

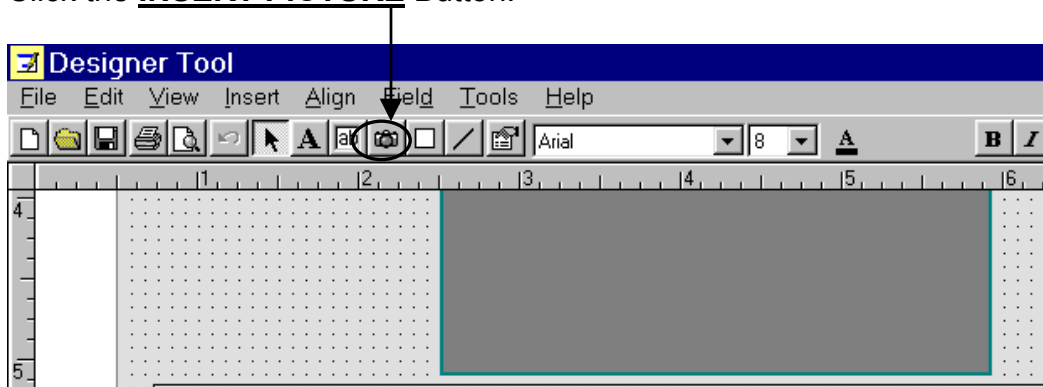


INSERTING GRAPHICS

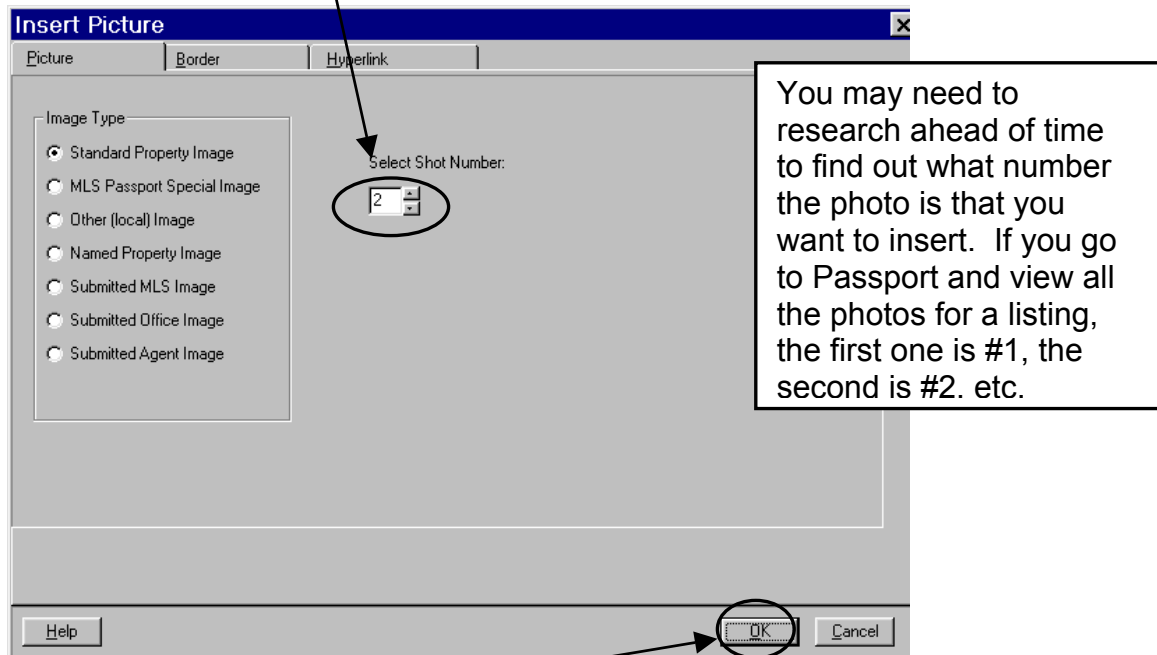
You can insert additional photos on your flyers. In the following examples, we will insert additional property photos that were included with the listing as well as a photo of yourself that was taken from the company Internet site.

TO INSERT ADDITIONAL PROPERTY PHOTOS:

1. Click the **INSERT PICTURE** Button.



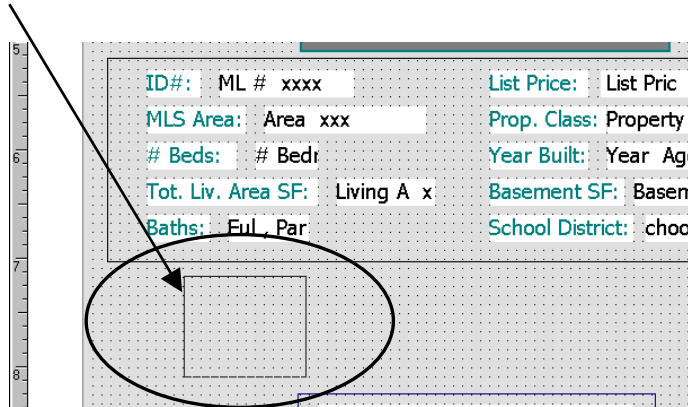
2. **SELECT THE NUMBER** of the photo you wish to insert.



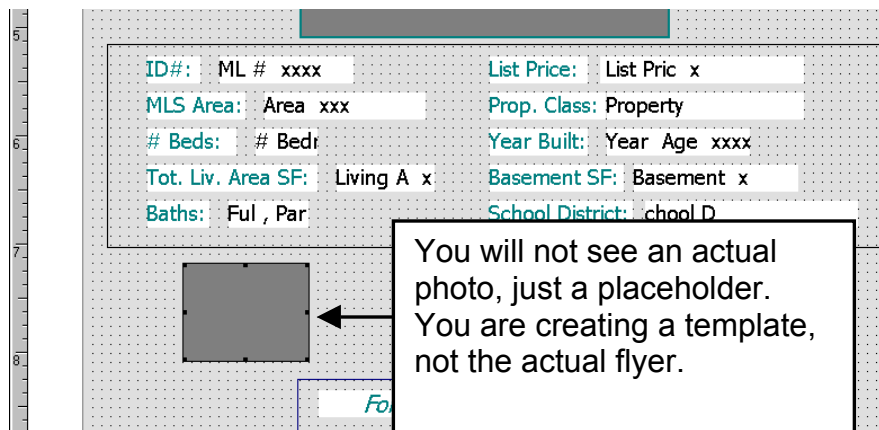
3. Click **OK**.

A camera icon will appear next to your pointer.

4. **CLICK AND DRAG** a box representing where you want the photo to go.



5. **LET GO** of your mouse button.



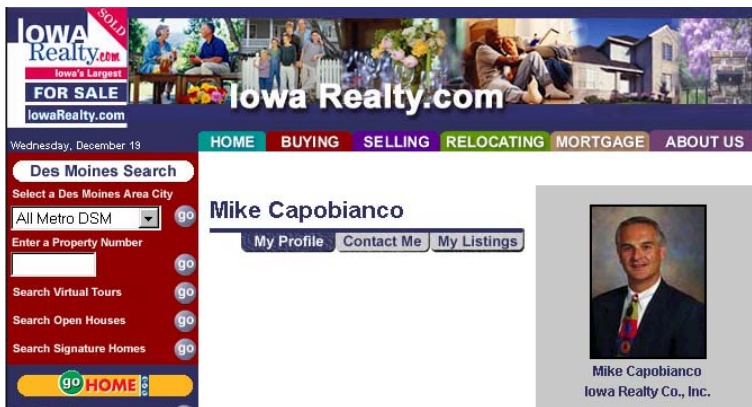
6. REPEAT this process for additional photos.

INSERTING YOUR OWN PHOTO FILES

You can insert any photo file that you have available. In this example, we will insert the agent's photo. Since most agent's photos are on the company web site, we will locate and save the file to be used from there first.

TO SAVE A PHOTO FROM THE INTERNET:

1. LOCATE the photo you wish to save.



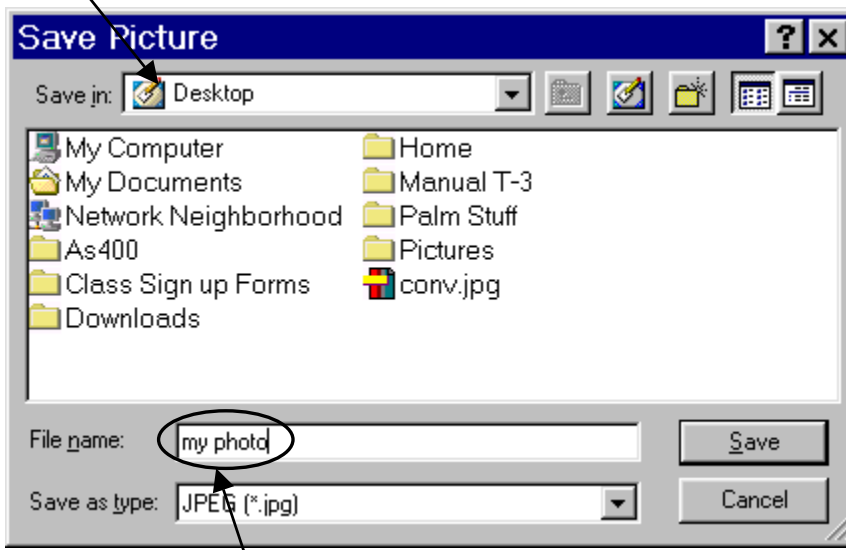
You can find your photo by going to your agent profile page on the company web site.

2. RIGHT-CLICK ON TOP of your photo.



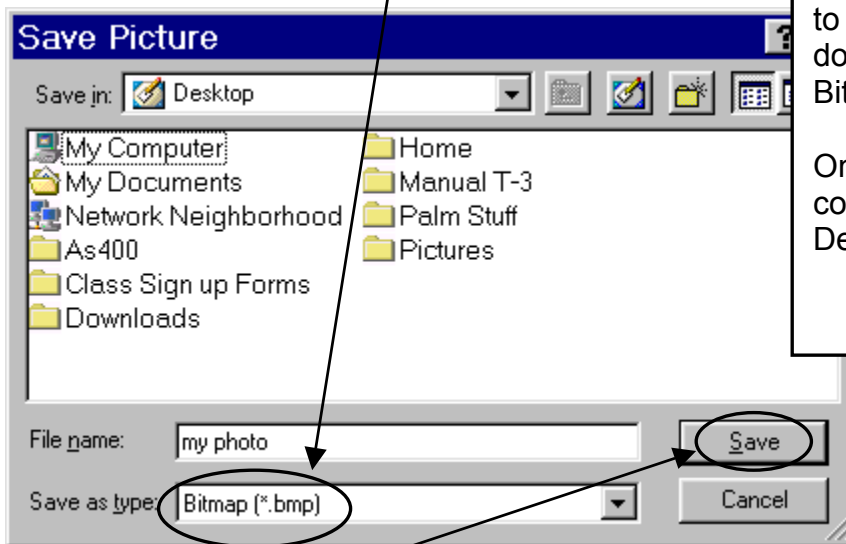
3. LEFT-CLICK Save Picture As...

4. **SAVE** this photo wherever you want (*we will save to Desktop*).



5. Give this photo a **NAME**.

6. CHANGE THE TYPE to **BITMAP** (*.bmp).



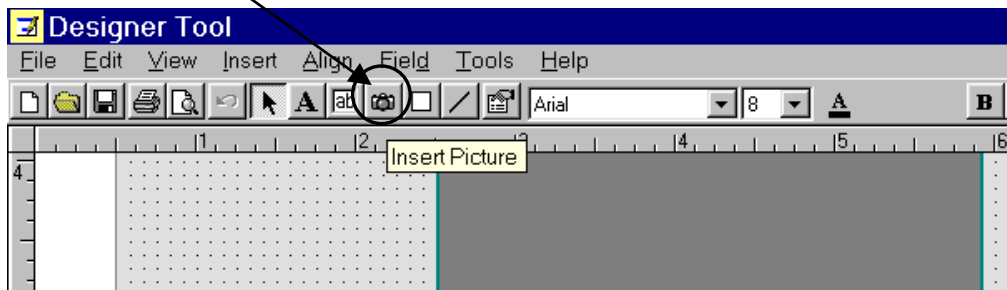
To change the file type to bitmap, click the down arrow and click Bitmap.

Only .bmp files are compatible with Designer Tool.

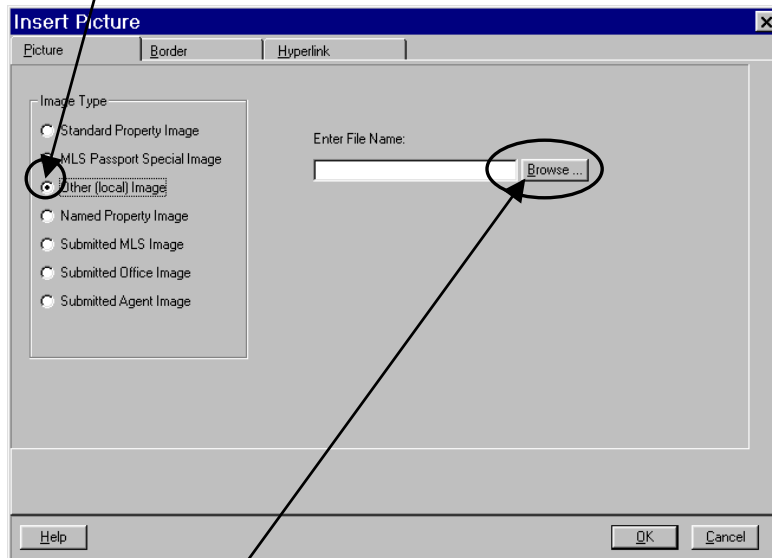
7. Click **SAVE**.

TO INSERT A PHOTO FILE:

1. Click the **INSERT PICTURE** Button.

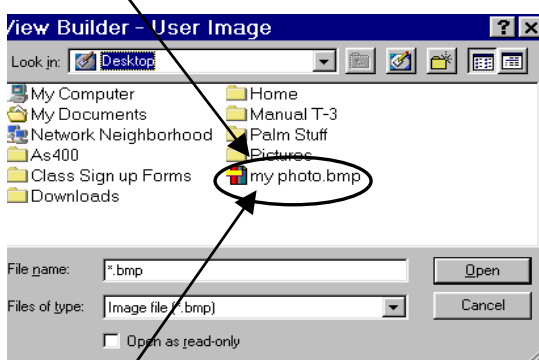


2. Click **OTHER LOCAL IMAGE** Button.



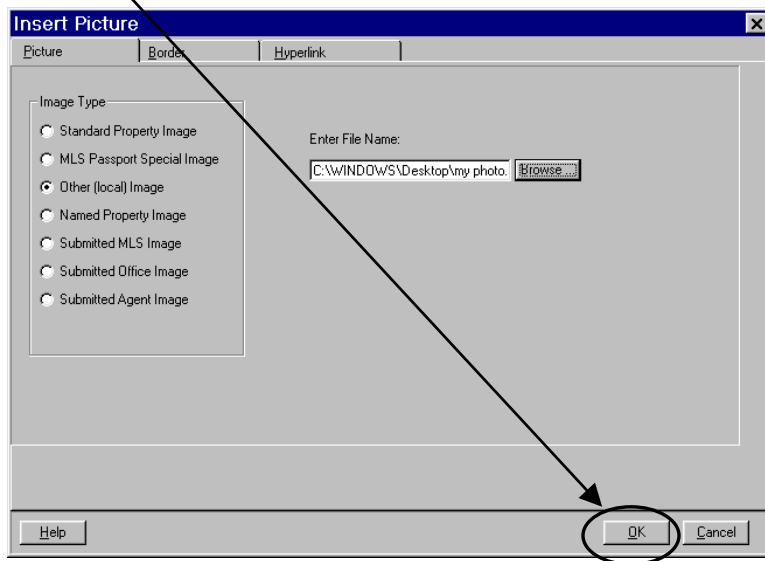
3. Click **BROWSE...**

4. **LOCATE** the file you want to insert.



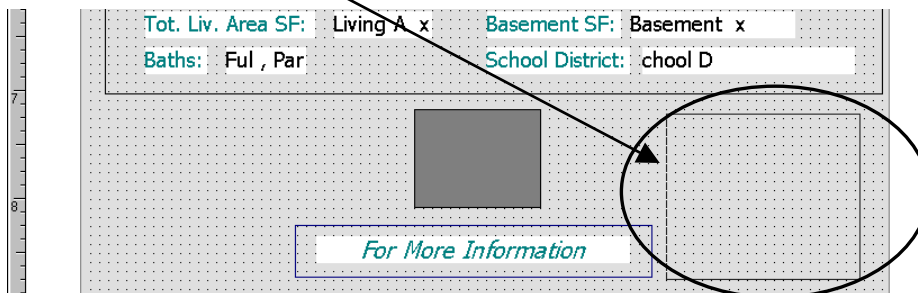
5. **DOUBLE-CLICK** the file.

6. Click **OK**.

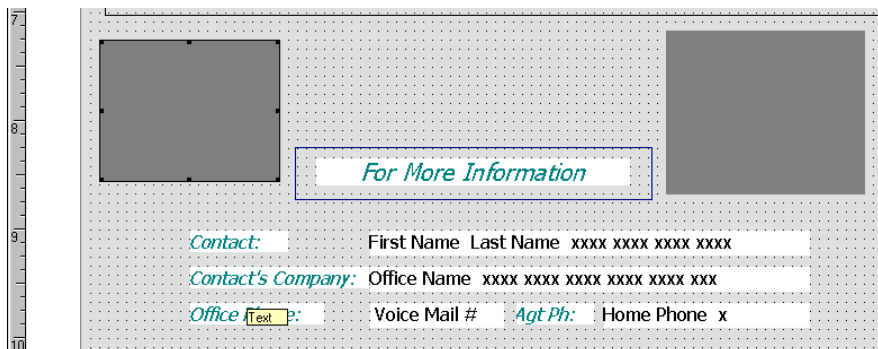


A camera icon will appear next to your pointer.

7. **CLICK AND DRAG** a box where you want to photo to go.



8. **LET GO** of your mouse button.



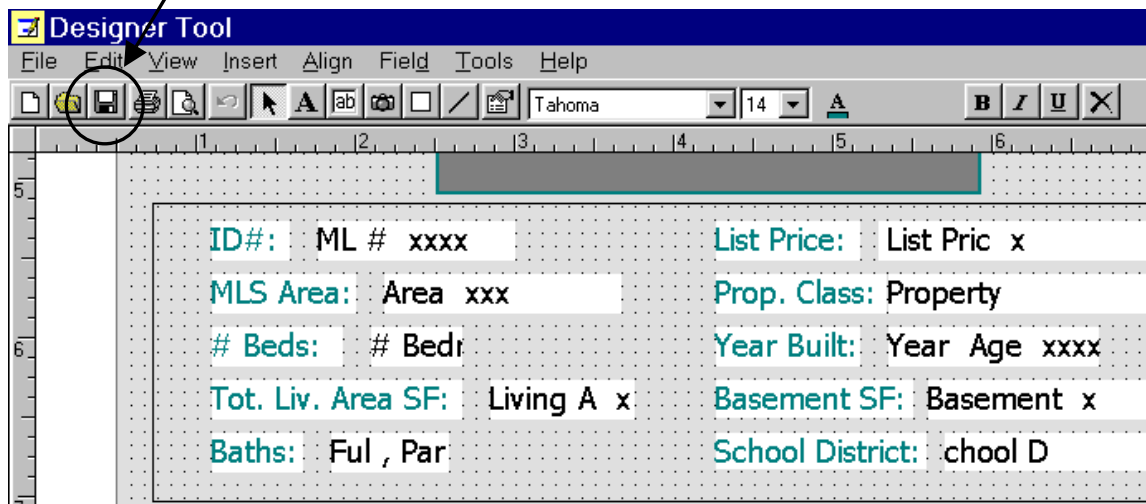
TIP: To remove the border around a photo, double-click the photo. Click the Border tab, and click None next to Border.

SAVING CHANGES TO YOUR FLYERS

It is recommended that you save your work every few minutes or so to prevent losing your work should you experience computer problems. Once you are finished editing your flyer, you will need to save it so that you can export it to Passport and Net.MLS.

TO SAVE CHANGES:

1. Click the **SAVE** Button.

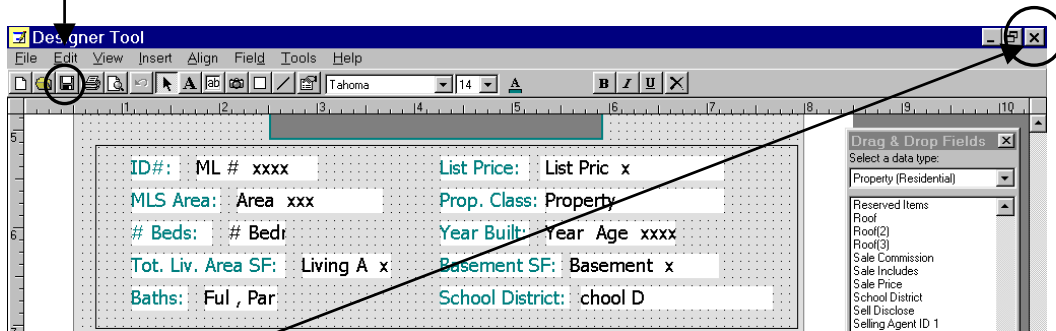


EXPORTING YOUR FLYER TO PASSPORT & NET.MLS

Once you have finished editing your flyer, you will need to save it and close Designer Tool. You will then logout of Passport and synchronize. You will need to log back into Passport and synchronize again. Once you have done this, your flyer will be available for you to use in both Passport and Net.MLS.

EXPORTING A FLYER

1. **SAVE CHANGES** to the flyer.

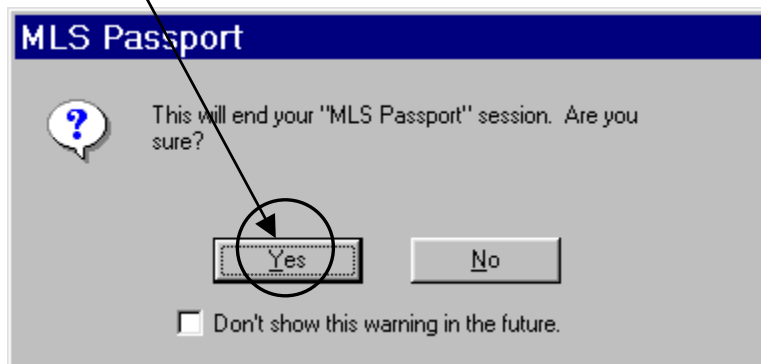


2. **CLOSE** Designer Tool.

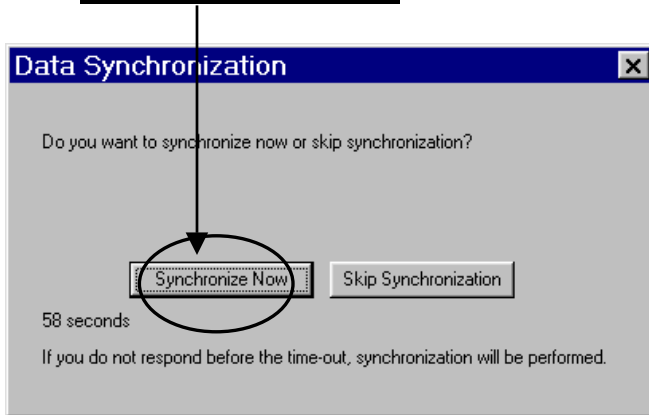
3. **LOGOUT** of Passport.



4. Click **YES** to end your session.



- Click **SYNCHRONIZE NOW**.

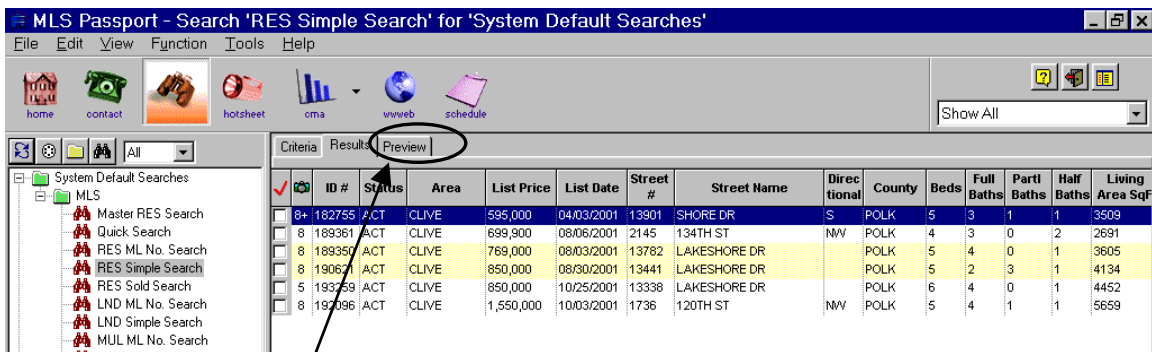


- LOGIN** to Passport.

- Click **SYNCHRONIZE NOW**.

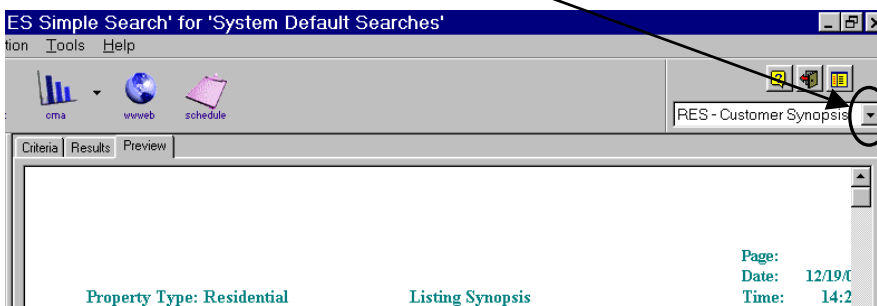
USING YOUR TEMPLATES IN PASSPORT:

- FIND THE LISTING (S)** you wish to print using your new flyer.

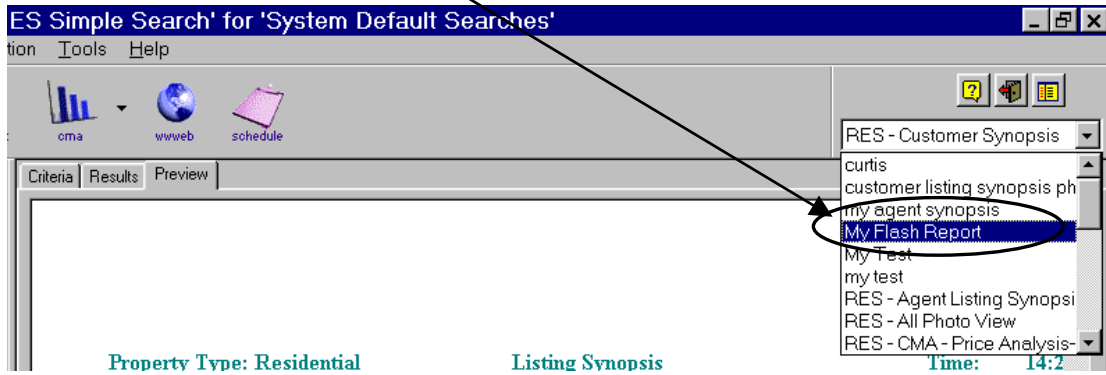


- Click **PREVIEW TAB**.

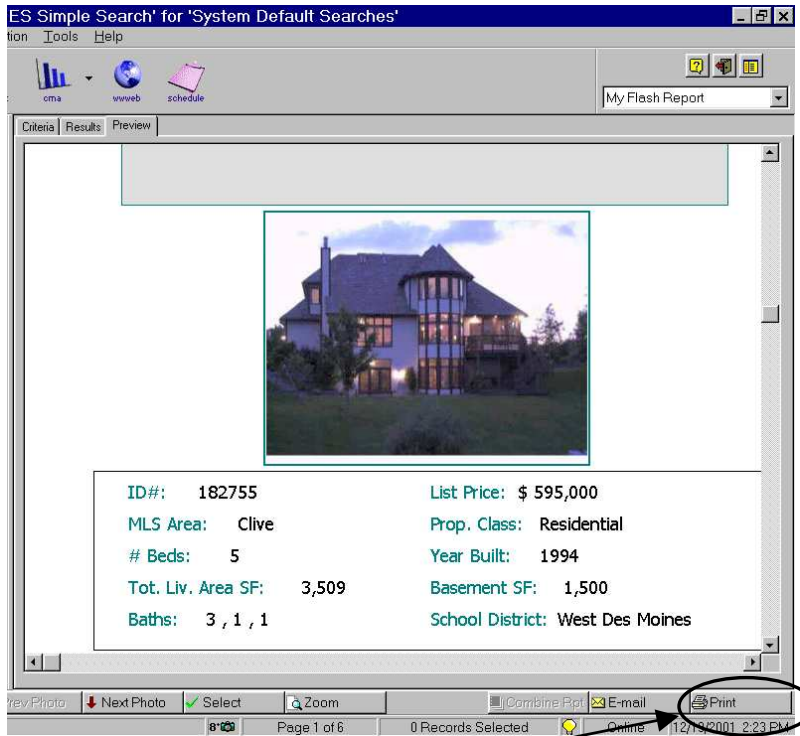
- Click **DROP-DOWN ARROW** to view flyer templates.



11. Click **NAME OF YOUR FLYER** (may need to scroll up).



The flyer will preview below.



12. Click **PRINT**.