

TOUCH**CMA**

Using Your Admin Account

Take control with TouchCMA's
administrative tools!

Brokerage Super Powers

From your administrative account, you can control everything from **licenses** to detailed **reports** of your agents' production.

TouchCMA gives the broker the ability to manage its agents from a single admin dashboard. As your company expands, TouchCMA's dashboard will ease growing pains and give you insight into your brokerage's activities.

Managing Licenses

The screenshot shows the TOUCHCMA admin interface. The left sidebar contains a menu with items: Dashboard, Profile, Subscriptions (highlighted in red), Licenses, Reports, Templates, and Help. The main content area shows the breadcrumb path: Subscriptions > Demo TouchCMASuite Subscription > Licenses. Below this, the title is 'Demo TouchCMASuite Subscription Licenses'. There are tabs for 'Licenses', 'Search Users', and 'Assign Licenses'. An 'Actions' button (highlighted in red) is located in the top right corner. Below the tabs, there are filters for 'All 1', 'Assigned 1', and 'Unassigned 0'. A table displays the license information:

#	ID	First Name	Last Name	Email	Status	Emailed	Assigned	
1	118511	Jillian	Igarashi	jill.igarashi@winderm...	assigned	03/03/14 14:13		Show ⚙️

Sign into your admin account, and select the **Subscriptions** section.

Use the **Actions** button to assign licenses to new agents, clear old agents, or resend invitations.

Note: Contact your Account Manager if you run out of available licenses.

Reports

The screenshot displays the TOUCHCMA Reports section. The sidebar on the left includes links for Dashboard, Profile, Subscriptions, Licenses, Reports (highlighted with a red box), Templates, and Help. The main content area shows the 'Reports User Report' page, with a breadcrumb trail 'Reports > User Report'. Below the breadcrumb, there are tabs for 'Reports', 'User Report', and 'Activity Report', and an 'Actions' button (highlighted with a red box). The main content area is divided into two sections: 'Total Licenses' and 'Top 25 Users (based on total presentations created)'. The 'Total Licenses' section contains a table with three columns: 'Total Admin', 'Total Invited', and 'Total Activated'. The 'Top 25 Users' section contains a table with columns: 'Agent Name', 'Office Name', 'Presentations Created', 'APR', 'MAR', and 'FEB'.

Total Licenses		
Total Admin	Total Invited	Total Activated
3	0	13

Top 25 Users (based on total presentations created)					
Agent Name	Office Name	Presentations Created	APR	MAR	FEB
Georgia Perez	Corporate Headquarters	63	2	18	24
Victor Williams	Your Brokerage	35	2	8	0
York Baur	Corporate Headquarters	6	3	3	0
Jillian Igarashi	Corporate Headquarters	5	1	4	0

The **Reports** section gives you full visibility into your agents' production. Select **User Report** to view a snapshot of your top 25 producers.

Use the **Actions** button export a CSV file of all active and invited agents, or export a CSV file of invited agents only to focus your adoption efforts.

Reports (continued)

The screenshot displays the TOUCHCMA interface. The top navigation bar includes the TOUCHCMA logo and a search box. The left sidebar contains menu items: Dashboard, Profile, Subscriptions, Licenses, Reports (highlighted), Templates, and Help. The main content area shows the 'Reports Activity Report' page. The breadcrumb trail is 'Reports > Activity Report'. Below the title, there are tabs for 'Reports', 'User Report', and 'Activity Report', with an 'Actions' dropdown button highlighted. The first table, 'Total Presentations Created by Month', shows data for April (10), March (35), and February (24). The second table, 'Total Presentations Created by Type', shows data for Total Presentations (114), Total Seller CMA (62), and Total Buyer CMA (52).

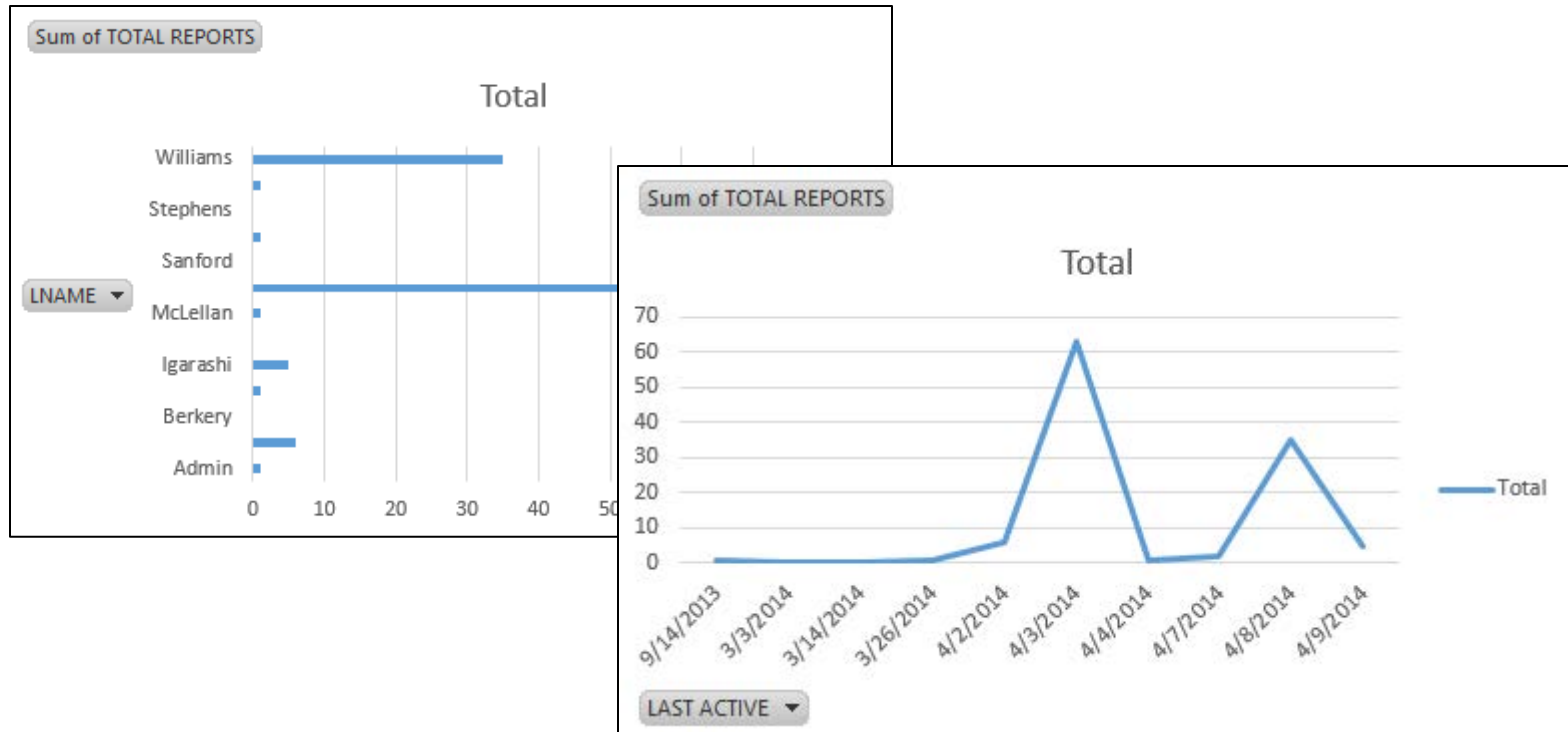
Total Presentations Created by Month		
April	March	February
10	35	24

Total Presentations Created by Type		
Total Presentations	Total Seller CMA	Total Buyer CMA
114	62	52

The **Reports** section gives you full visibility into your agents' production. Select **Activity Report** to view a snapshot of production within the last three months, and Seller vs. Buyer production over time.

Use the **Actions** button export a CSV file of all production activity within a specified time frame of your choice.

Let the Data Set You Free!



Use the Reports function to your advantage. View the data on your TouchCMA Admin Account, then export CSVs to analyze the data at any point in time!

Note: For help with reporting, please contact your assigned Account Manager or the Support Department at 206-388-4789 or Support@touchCMA.com.