Merritt Realty Technology Sheet

Intranet:

www.agent.gomerritt.com

username: gomerritt

Password: Secure1

Once logged in there will be two options On Network or Off Network. On Network is for when you are in the office or connected to the VPN (Virtual Private Network). Off Network is for outside of the office and when not connected to the VPN.

Within this site you will have access to the; online email client, agent contact management program (Sugar CRM), Document Management Program, Form, Vender, web links and M-net. The site also provided contact information for the offices and links backs to the gomerritt.com website

Email: Email is easy, we use Microsoft 365 which is hosted by Microsoft and offers online outlook and seamless integration with Outlook desktop. The system will also sync with Smart phones. The Domain\username is: \youremail@gomerritt.com Password: your password. The Exchange Server is will automatically find the setting and configuration:.

Setting your VPN: Open Network Shearing, then click set up a new connection, then click Connect to a workplace, then click next, then click use my internet connection, in the internet address box enter vpn.gomerritt.com, in the destination name box type Merritt VPN, then click next, enter your username, should be your first initial and last name, password is your password. , there is not a domain and check remember this password, and then connect. Once connected go to the connection right click and select properties, go to the Networking tab, go to the internet protocol version 4 select it and click properties, go to the Advance button and click, make sure Use default gateway on remote network is unchecked. Click ok and your VPN is configured.

Shared Drive: Once connected to the Merritt VPN you will need to open your networked drive. Go to the search box and enter \\172.27.0.10 and click the magnifying glass, the box will open click on agent and then enter your username and password then when you see your folder

Mac User: *Hit the Control Button and Click the Finder Icon. Then Connect to Server enter the IP address and it will prompt you for your user name and password (first initial last name for username and your password) you will have access to your drive and the merritt folder only.*

Sugar CRM: Go to the Contact Management Link enter your user name and password. Once logged in there is information on using the program. To install Sugar on your smart phone go to your play store search Rolus Sugar CRM Pro by Rolustech. Install the app. The URL is http://crm.gomerritt.com your username and your password then log in.

Document Management: this is the online filing cabinet for the company. Click on the Document management link. Login using your username and password, then follow the instructions for uploading the documents. Before you add a document you must first add the property the document is related to and then the two clients involved in the document. Sometime like in a listing agreement there is only one client, whereas in the lease there are two. Once you have entered the property and the clients then you are ready to scan and upload the documents. To add a Property click the Properties Link and then go to the bottom of the Property Report and click Add New, fill in the information and click add. If you are going to be adding multiple Properties repeat the aforementioned steps. To Add a Client click the Clients link and go the bottom of the Client Report and click the Add New, fill in the blanks and use the current date then click add. Once all clients have been added you are ready to upload documents. To Add Documents go to the Documents Link, go to the bottom of the Document Report and Click Add New. Use the drop down menus to fill in the documents and browse for the document, the date is the date of the document not the current date, Doc location is the office in which it was scanned from, please fill in a description of the documents under the Notes. Then click Add repeat steps until all documents are added.