eEdge: The Contact Manager

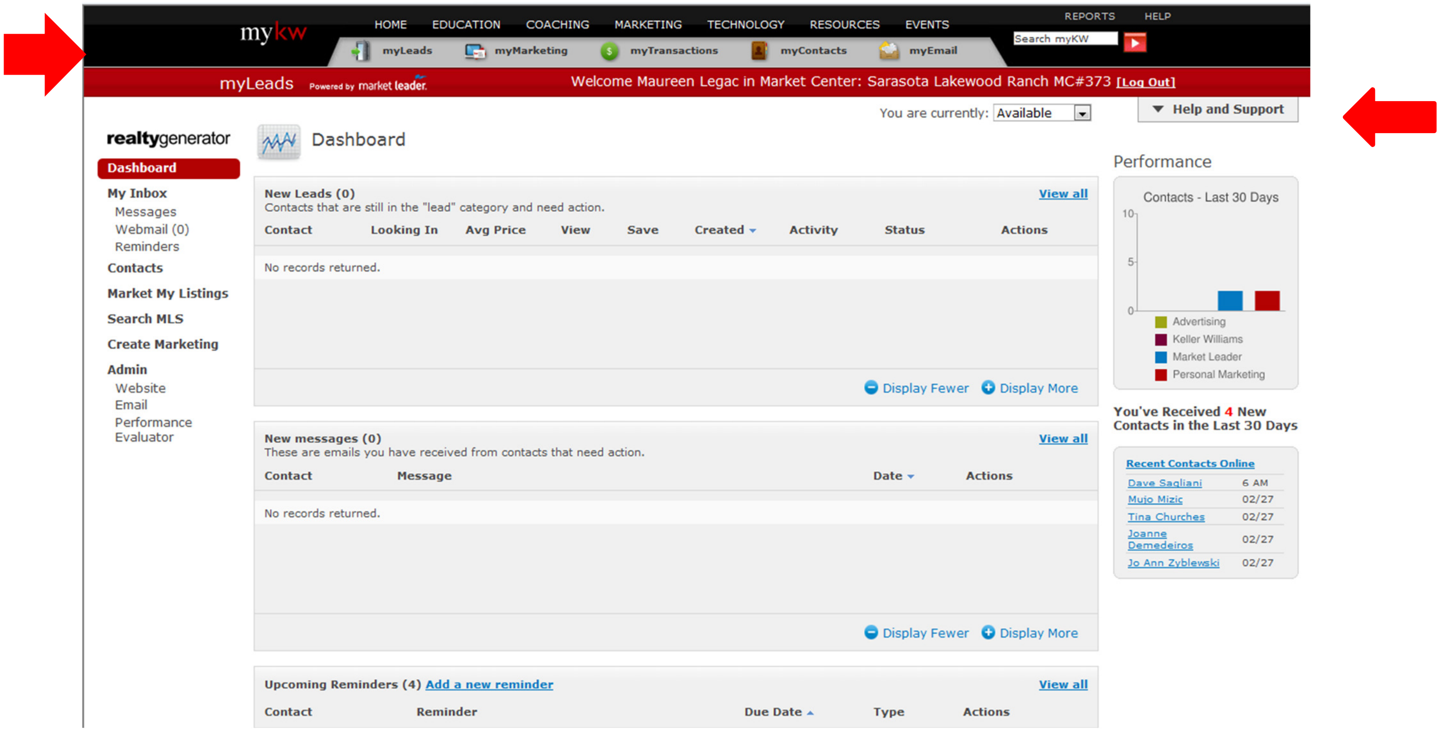
First – *__a review of the system__*…What is eEdge? It is a lead to close business solution offered only to KW agents. It contains lead management and routing, contact manager, marketing and paperless transaction system. It allows you to sign on in one place (www.mykw.kw.com) and access kw.com, the intranet and Market Leader.

When you sign into www.mykw.kw.com you will see the eEdge control panel. This includes:

- **My Leads – notifies you of any new leads**
- **My Marketing – notifies you to take action on any new listings**
- **My Transactions – notifies you of any action required on contracts (rolls out in May)**
- **My Contacts**
- **My Email**
- **On the left side of the page, below your picture, you will see "MC 373 Web Office".**

All sections of eEdge are integrated so when you access your Marketing tools, the information is populated from "My Contacts". Wherever you are in the eEdge system, the control panel toolbar will appear at the top of the page.

For those familiar with Market Leader, the "Help and Support" option has been moved to the upper right side of the page.

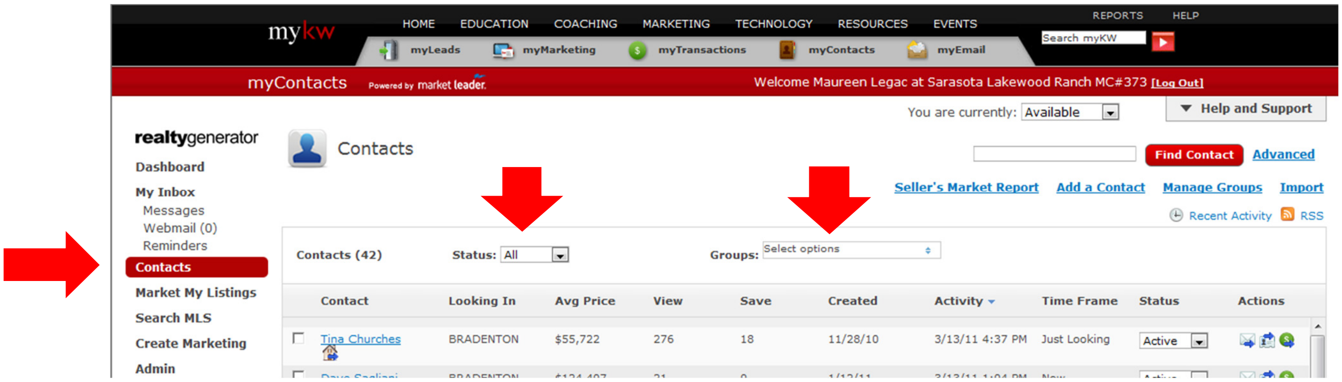


To be successful with your eEdge system, you should be completing these actions daily:

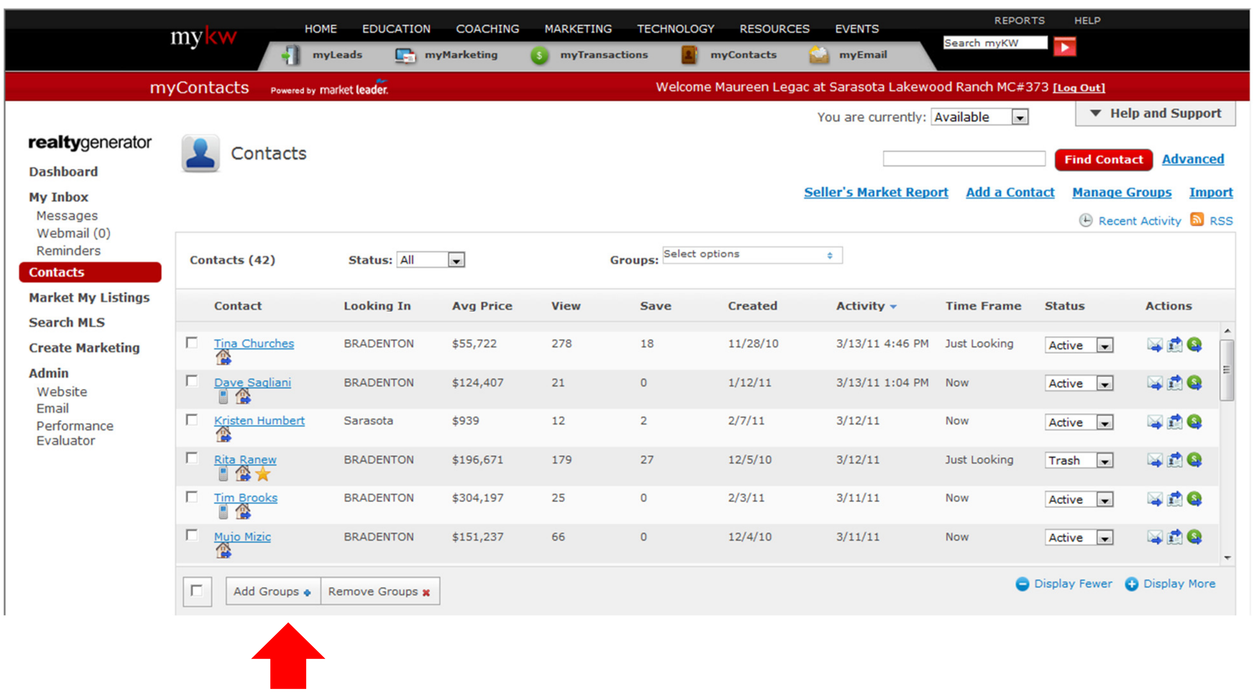
1. **Login to eEdge at least twice a day (morning and evening)**
2. **When you see a new lead, respond and UPDATE THEIR STATUS (this moves the lead off the dashboard and files it under that lead name where you can find it when you return to eEdge)**
3. **Reply to new email from prospects (file the email – so it moves to the prospect file)**
    a. **Mail from prospects that are registered**
    b. **Mail from potential prospects that are not registered (webmail)**
4. **Take action on all current reminders and set future reminders**
5. **Prepare marketing material for new listings or listing appointments**
6. **Once launched (in May), check and address notifications under "My Transactions"**

<u>Managing Contacts</u>

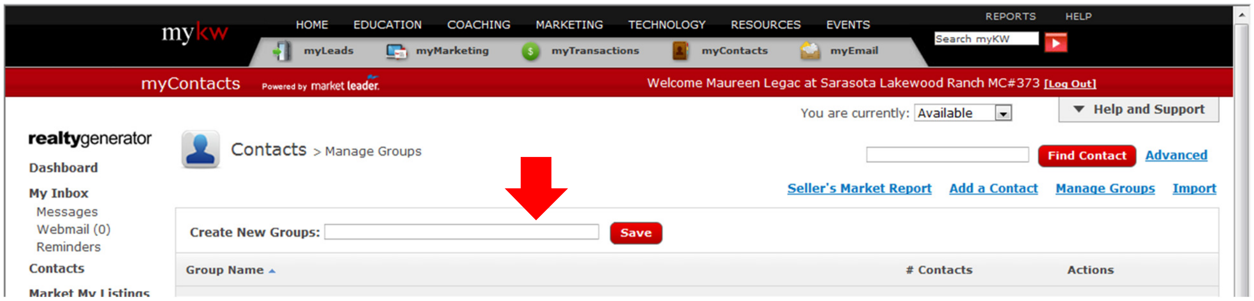
Once you have signed on to www.mykw.kw.com (www.kw.com also works – you have to go to the bottom of that page to login), you will see the eEdge Dashboard. Click on "View Contacts" in the upper middle section of the page. This will take you to the Realty Generator Contact page. All of your contacts can be viewed from this page.



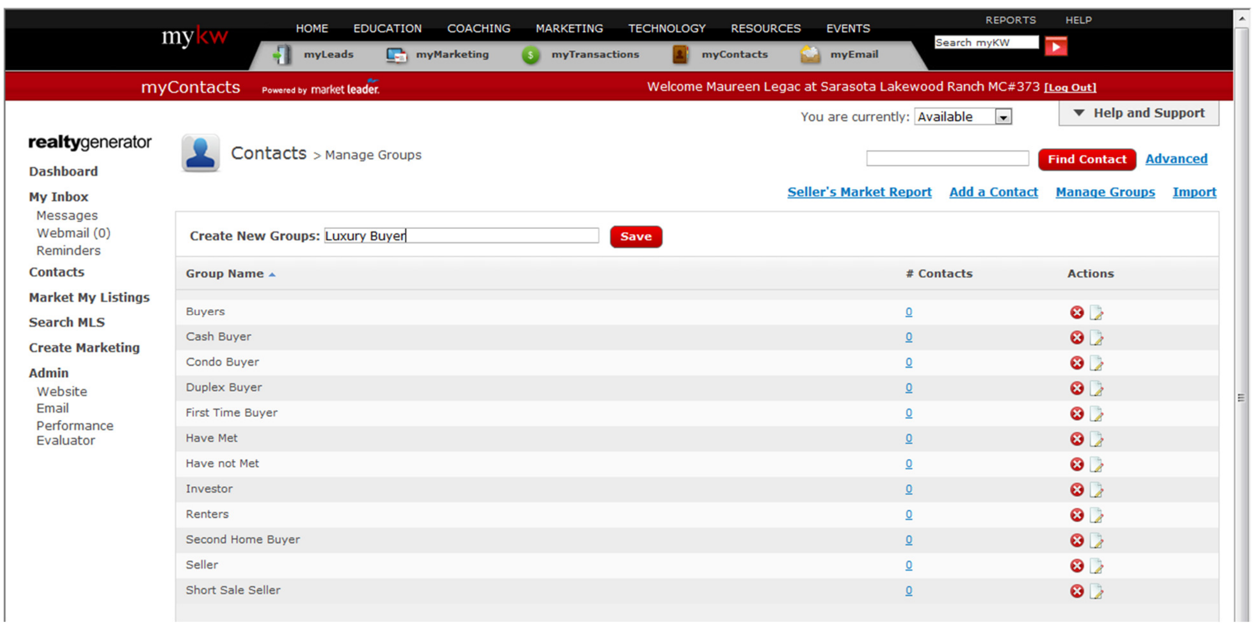
At the top of the Contacts page you will see a "Status" box and a "Groups" box. You can display "All" of your contacts or display by Status Type (using the drop down box). You can also display by "Group". Before you can use the "Group" function, you will have to set up Group Names.



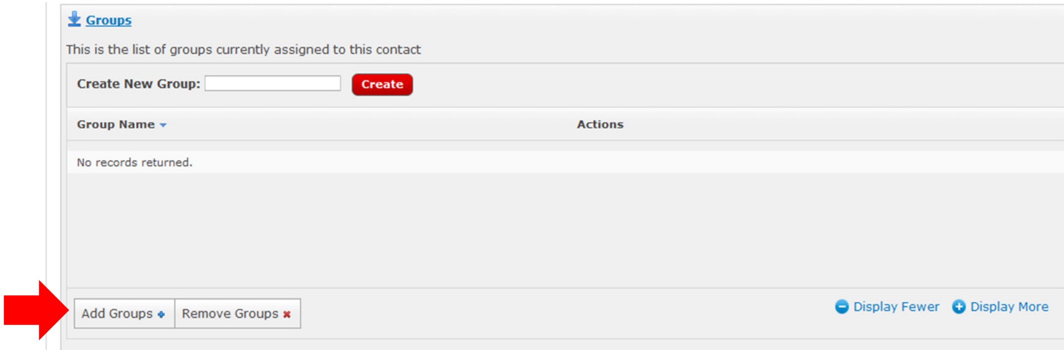
At the bottom of your list of contacts, click on the "Add Groups" link. A pop-up window will appear. Click on "Manage All Groups". A window will that will allow you to add new groups. Remember that the group will be used for marketing too – so make the groups as specific as you feel you will need to market properly (your 8x8, 33 Touch and so on).



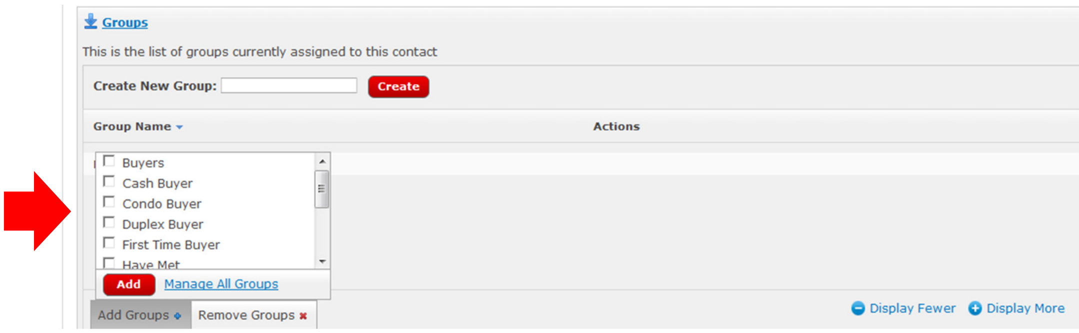
Add as many groups as you can think of based on the marketing you feel you may do. Contacts can belong to multiple groups. You could have a contact in the "Buyer" group, "First Time Buyer" group and "Have Met" group.



Before you add new contacts to the Contact Manager, assign groups to those contacts already in the system. To assign groups, click on the Contact Name and then go to the very bottom of that contact's page. There will be a "Group" box associated with that contact.



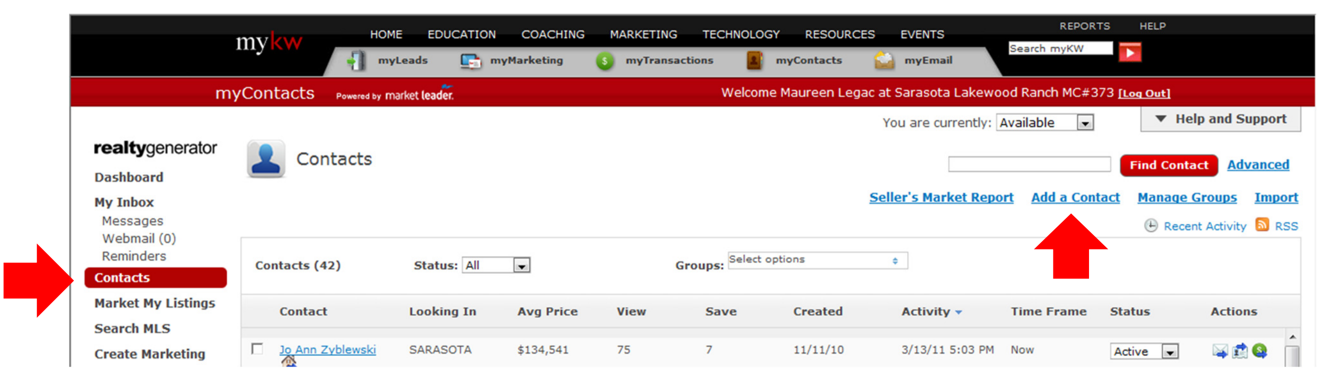
Click the "Add Group" link and a list of available groups will appear.



Check all the groups that you would like to associate with this contact and then click the "Add" link (red). The group(s) will now be assigned to that contact. Repeat this for all of your contacts.

Adding a Contact

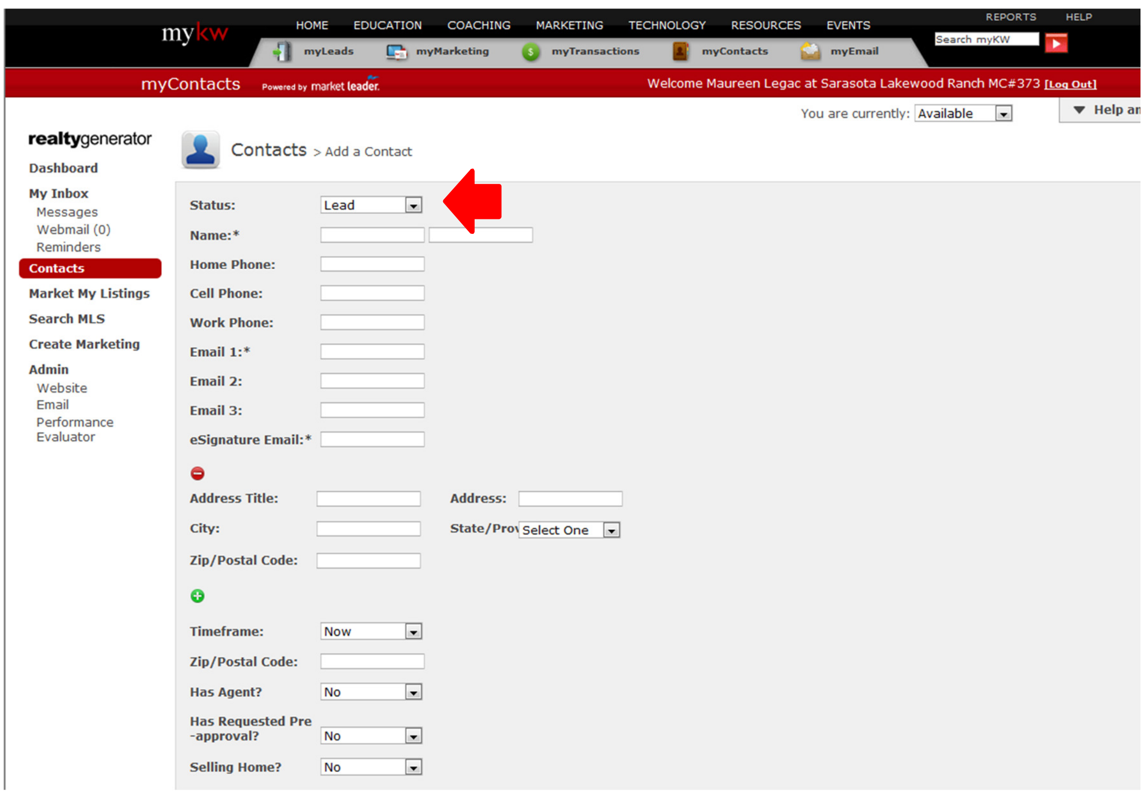
To add a new contact to your Contact Manager, go to the "Contacts" page and click "Add a Contact".



A window will open up that allows you to enter a new contact into your eEdge data base. The contact will be assigned the status of "Lead". Please make sure to change that to the appropriate status before you save the lead.

The following statuses are recommended for all of your Contacts:

- Lead - Leads who've just registered; you have not responded to them yet
- Retry - Contacts you're trying to engage
- Active - Contacts who are "just looking" but are interactive
- Inactive - Contacts who are not currently looking to buy
- Hot - Contacts who are ready to buy/sell now
- Sold - Contacts you have just closed
- Trash - Contacts who wish to be unsubscribed (there is no "delete" option)



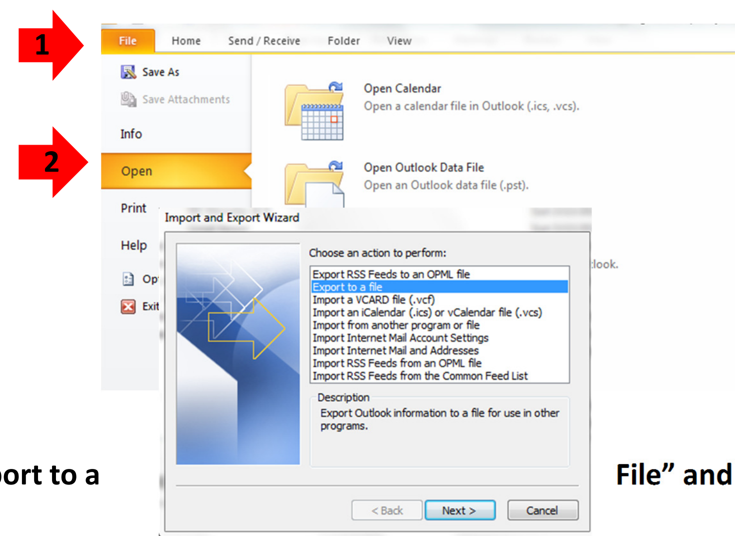
When you have finished adding your contact information, click "Save" at the bottom of the page. You will then be dropped onto that contact's summary page. Remember to go to the bottom of that page and assigned a group(s) to that contact.

Importing Contacts

Before you import all of your leads to the eEdge database, try to clean up your existing database. Also, continue using your current Contact Management System until you become familiar with and are comfortable with the eEdge Contact Management System.

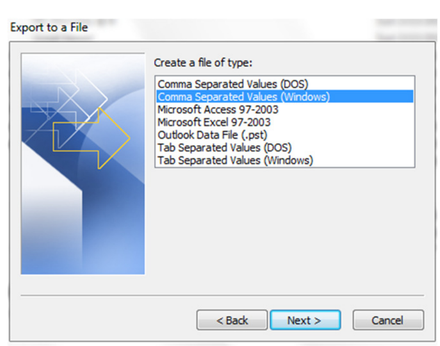
You can import up to 500 contacts a day. In April, a new upload system will be in place to help with the transition between your old Contact Manager and the eEdge Contact Manager. For now, it is best to upload the contacts by group (using the group category name).
You can import contacts from other contact managers (such as Outlook, Top Producer, and My Red Tools). To do this, you will first have to export the contacts from your current contact manager.

Each contact manager has a different method of exporting the contacts. In Outlook 2010, I was able to export the contacts by clicking "File" at the top of the outlook page…

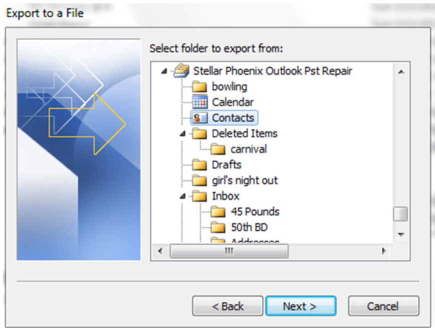


Then click "Export to a File" and click "next":

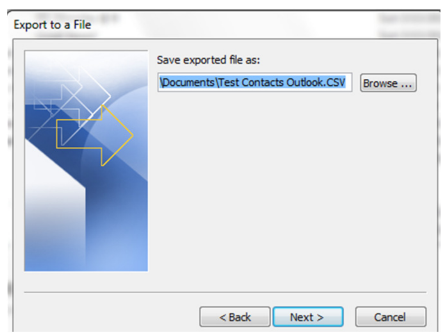
Next, click the type of file you wish to export. I picked Comma Separated Values (CSV) for Windows. Click "next"



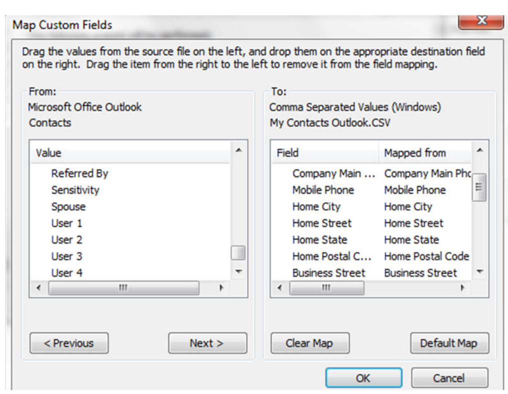
Next, select the folder you wish to export from. I selected "Contacts". Click "next".



You will be prompted to select the file to hold the exported contacts. Enter any file name that will help you remember what this file is called. Click "next".



The next screen will display all the fields in your Outlook contact manager. eEdge needs specific fields (below). Click "Clear Map" and all the preset fields (that would normally be exported) will be erased. Next click on the needed fields listed on the left side and drag them over to the right side (make sure to pull them over in the correct order). I did not find an Outlook field for "Password" (needed by eEdge) so I used the Outlook "User 1" field for password.

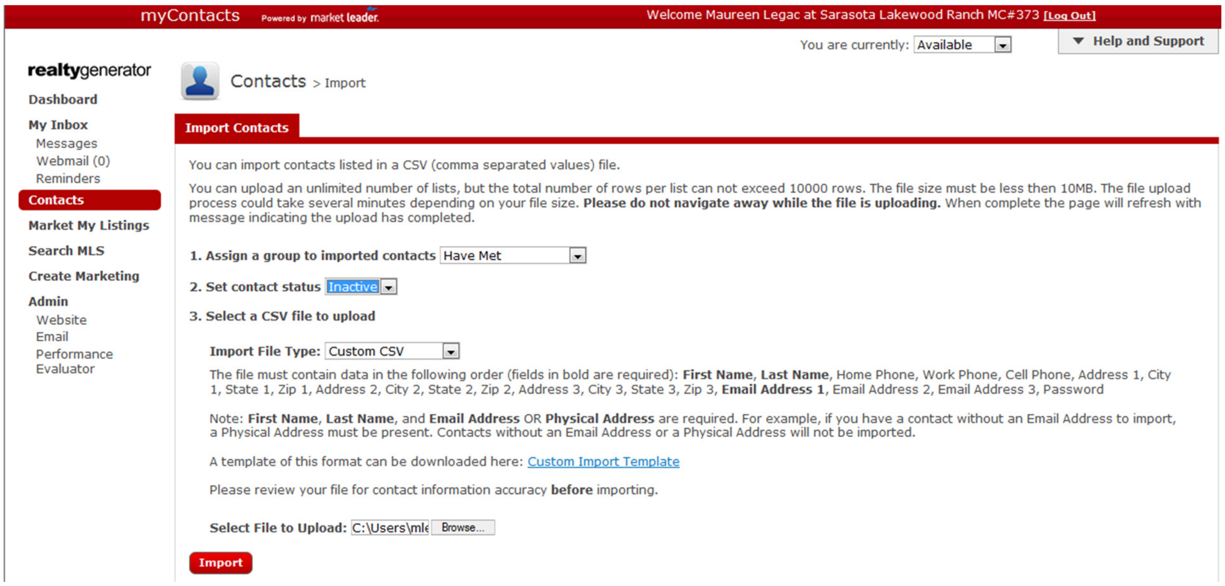


1. **First Name**
2. **Last Name**
3. **Home Phone**
4. **Work Phone**
5. **Cell Phone**
6. **Address 1**
7. **City 1**
8. **State 1**
9. **Zip 1**
10. **Address 2**
11. **City 2**
12. **State 2**
13. **Zip 2**
14. **Address 3**
15. **City 3**
16. **State 3**
17. **Zip 3**
18. **Email address 1**
19. **Email address 2**
20. **Email address 3**
21. **Password**

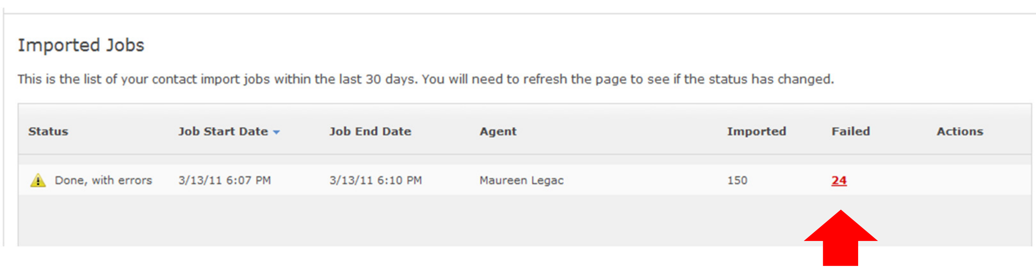
Note: Be sure all contacts have all of these columns in your spreadsheet even if they do not have data in them. Contacts MUST have a First Name, Last Name and email address in order to be imported as a contact. Be sure to delete the row with the header names (only import the actual contact information)

Once you have your CSV file completed, you are ready to import your contacts to eEdge.

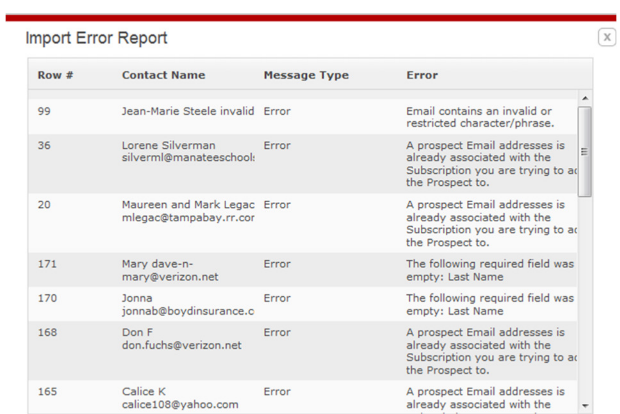
1. **Be sure to delete the row with the header names (only import the actual contact information)**
2. **Click on Import/Export on the upper right side of your "My Contacts" dashboard**
3. **When possible, assign a "group" to the contacts (this is why we recommend that you import by group)**
4. **Change the status from "Lead" to "Inactive" – so that all of the imports do NOT end up on your dashboard (and the system dashboard)**
5. **If you would like to send a "Welcome" message, check the box. DO NOT CHECK THE BOX IF YOU ARE UPLOADING MORE THAN 100 LEADS. Your email address will be flagged as a spam provider! You can send individual welcome emails at a later time.**
6. **Choose your *.cvs file and click "Import"**



7. **You will get a message showing how many records were imported and how many were not.**
8. **If not imported, the system will tell you:**
    a. **The *.csv file did not include all the proper information**
    b. **The information was not in the proper order**
    c. **The header row was not deleted**



Click on the link under the word "Failed" to see why those records were not imported to eEdge:

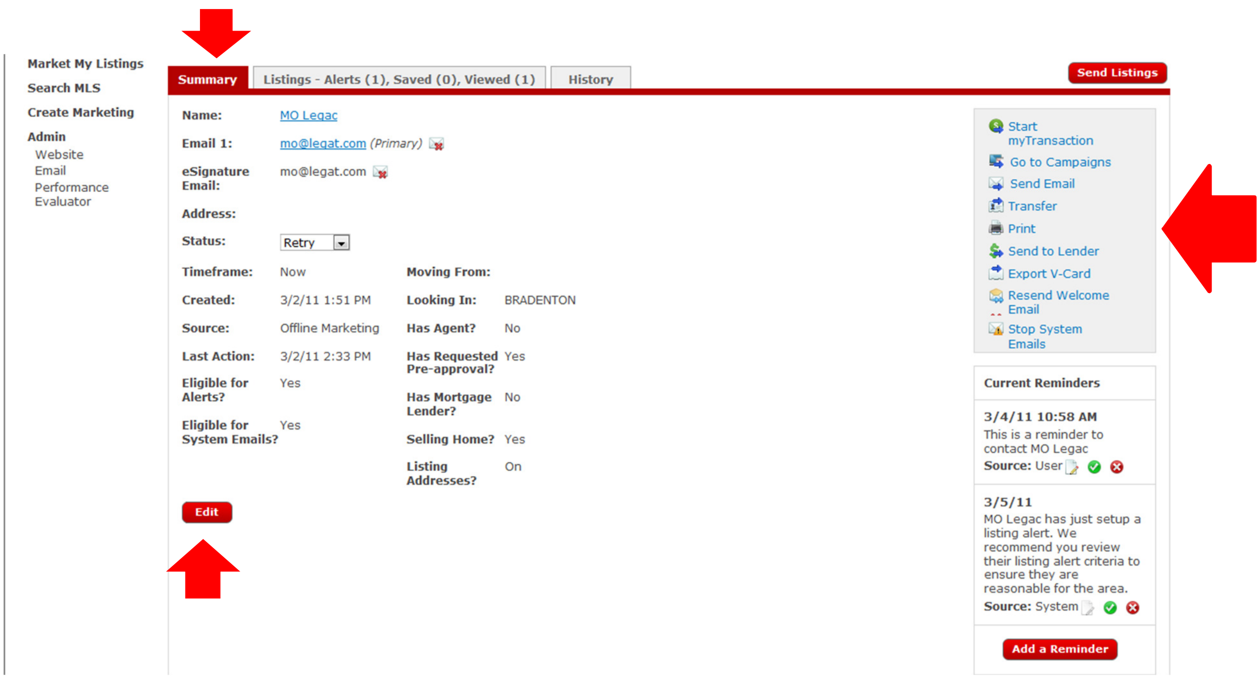


If necessary, correct the errors for those records and import them or add them manually to the eEdge contact manager.

Working with Contacts

Once you have contacts in your eEdge Contact Manager, you can market to them, set up listing alerts, email them, monitor their activity, transfer them to a team member, put them on a campaign, set up reminders for your touch campaigns, send their information to your lender and more.

Click on "Contacts" on the left side of your Dashboard. Select the contact you would like to work with and click on their name. A summary page will open up giving you options for this contact.



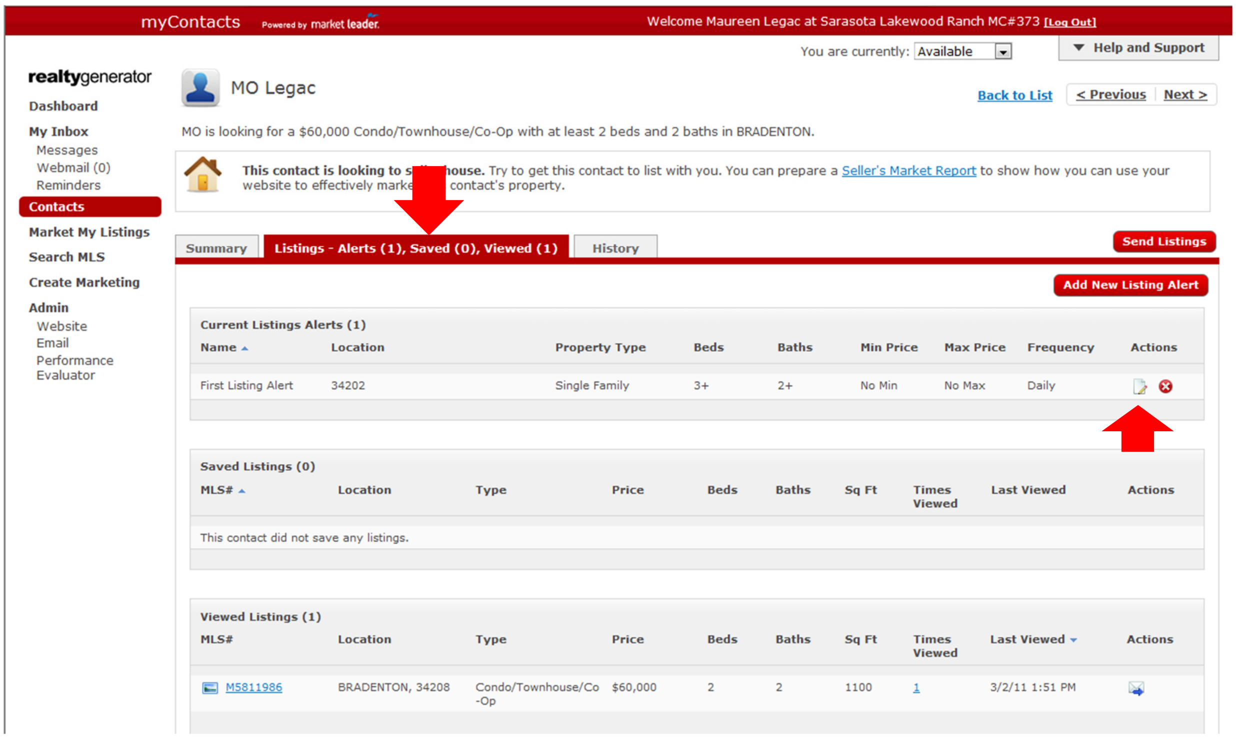
You will start on the contact's Summary Page. The contacts information will be displayed. Make sure to review the information and correct any errors using the "Edit" link. Check the contact's status and make sure it is assigned properly. Check the reminders on the lower right side of the page. If you have completed the tasks for those reminders click the green check mark to file those reminders with the contact's record.

Notice the upper right side of the page has options for this contact. You can "Go to Campaigns", "Send an Email", "Transfer" the contact to another agent, Print the contact information, send the contact information to the Lender (this sends the contact info to our preferred lender…at this time, we do not have a preferred lender established for our Market

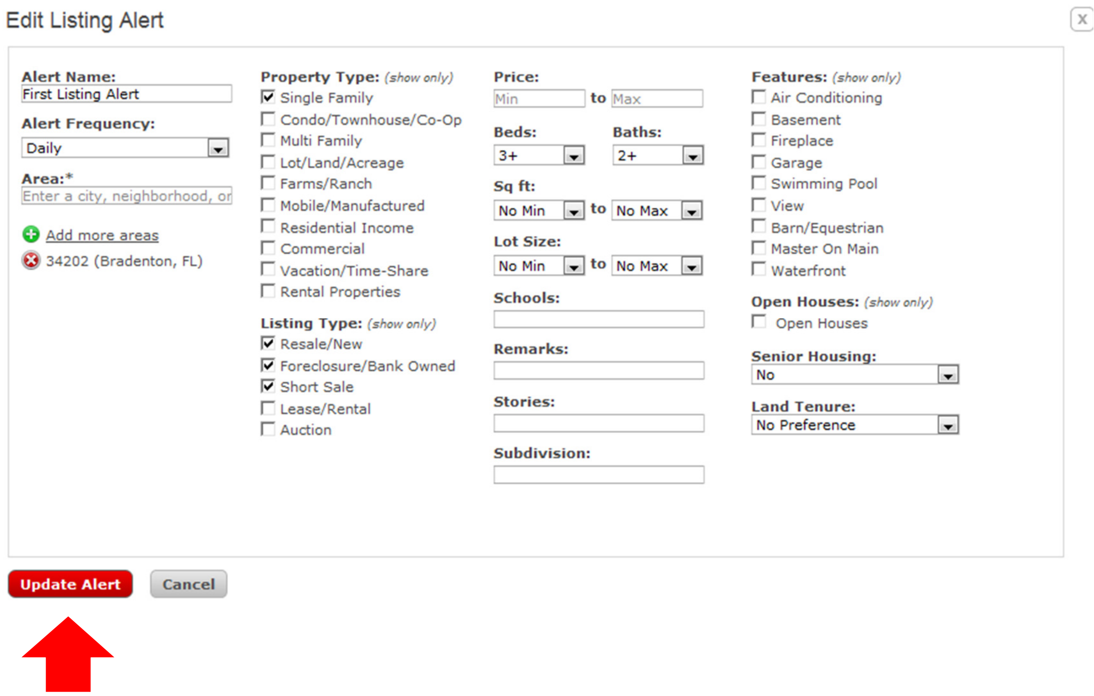
Center), Export V-Card (this is for Outlook only – other export options are listed below), resend a welcome email message and stop system emails (if the clients asks you to stop sending auto email messages). The first option, "Start my Transaction", is not yet available (expected to come online in May).

Not all agents are actively using the eEdge system. If you transfer a contact to another agent, make sure to let them know that they have a lead.

The next contact section is the Listing Alerts and Listings Viewed page. Click on this link at the top of the contact page.

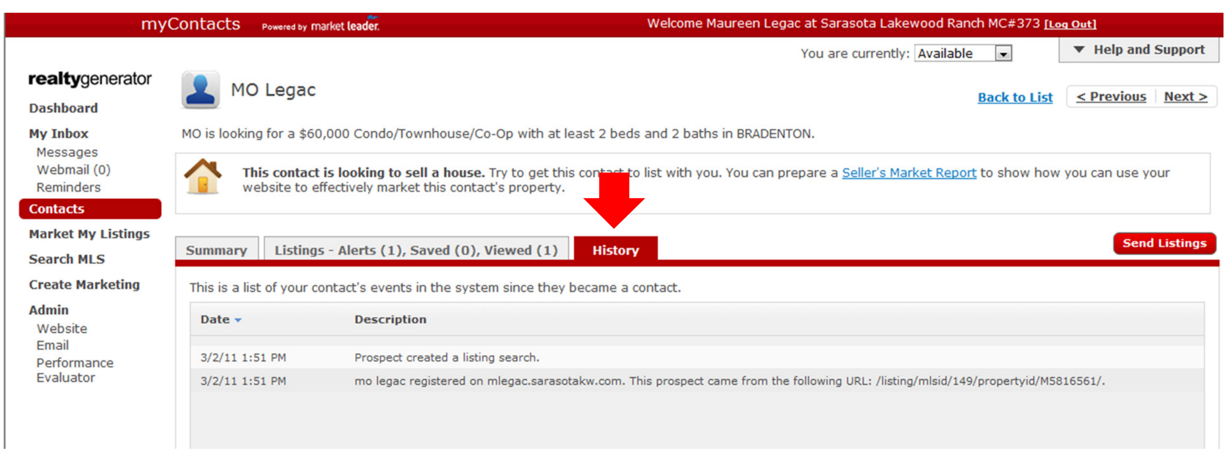


This is where you can see which listings the contact is looking at and what alerts they have set up (to receive listings automatically from the eEdge system). Make sure to review the listing alert and make any changes as needed. The contact may not realize they have selected commercial property and rentals with their alert. Click on the paper and pencil symbol at the end of the listing alert to view and edit the alert.



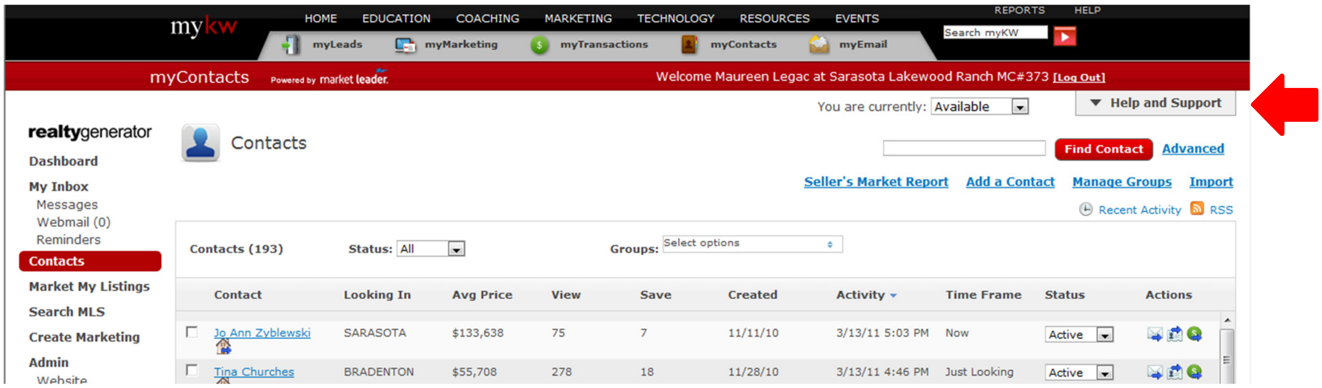
When you have finished updating the alert information, click "Update Alert" at the bottom left side of the page.

The last section of the contact page is the History section. This will show you how the contact got to you, notes you made or the call center made, listings the contact looked at that directed them to you and more.



Training

Make sure to take advantage of the training sessions offered by Market Leader. You can find those under the "Help and Support" tab on the upper right side of the Dashboard.



Click "Training" under "Help and Support" to find training videos and live classes.