

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”.

The screenshot displays the mykw eEdge control panel for Maureen Legac. The top navigation bar includes links for HOME, EDUCATION, COACHING, MARKETING, TECHNOLOGY, RESOURCES, EVENTS, REPORTS, and HELP. A search bar is located on the right. Below the navigation bar, a red banner reads "Welcome Maureen Legac - Market Center: Sarasota Lakewood Ranch MC#373 [Log Out]". The main content area is divided into several sections. On the left, there is a user profile for Maureen Legac with a 100% profile completeness and a link to "[Edit My Profile]". Below this is a table titled "Listing and Sales by Month" with columns for Units and Volume, and rows for Listings Taken, Listings Sold, Sales Written, and Sales Closed. The table shows data for January. Below the table is a "My Communities" section with links for "Distressed Properties", "KW Commercial", "MC Tech Coordinator", and "MC 373 Web Office". A red arrow points to the "MC 373 Web Office" link. The main dashboard features several widgets: "myLeads (0) New Lead", "myMarketing (1) New Listings [show options]", "myTransactions Coming Soon! Check Availability", "myContacts View Contacts Add New Contacts" (with a red arrow pointing to it), and "myEmail (0) eEdge Messages KW Email". A large red arrow points to the "myContacts" widget. Below these widgets is a "KELLER WILLIAMS REALTY BREAK on THROUGH State of the Co. 2011" banner. To the right of the banner is an "Agent Referral Search" button and a "Featured Vendors" section with a gift icon. At the bottom, there is an "Announcements" section with a link to "[ARCHIVES]" and a notice about a "Good Neighbor" award.

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.

The screenshot displays the mykw.com eEdge Dashboard. At the top, there is a navigation bar with links for HOME, EDUCATION, COACHING, MARKETING, TECHNOLOGY, RESOURCES, EVENTS, REPORTS, and HELP. Below this is a secondary navigation bar with icons for myLeads, myMarketing, myTransactions, myContacts, and myEmail. The main header area includes the myLeads logo, a welcome message for Maureen Legac, and a 'Log Out' link. The dashboard is divided into several sections: a left sidebar with navigation options like My Inbox, Contacts, and Admin; a central area with 'New Leads (0)', 'New messages (0)', and 'Upcoming Reminders (4)'; and a right sidebar with a 'Performance' chart and 'Recent Contacts Online' list. Two red arrows are overlaid on the image, one pointing to the top navigation bar and another pointing to the right-hand side of the dashboard.

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”

Managing Contacts

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.

mykw myContacts Powered by market leader. Welcome Maureen Legac at Sarasota Lakewood Ranch MC#373 [Log Out]

You are currently: Available Help and Support

realtygenerator Contacts

Dashboard
My Inbox
Messages
Webmail (0)
Reminders
Contacts
Market My Listings
Search MLS
Create Marketing
Admin

Contacts (42) Status: All Groups: Select options

Contact	Looking In	Avg Price	View	Save	Created	Activity	Time Frame	Status	Actions
<input type="checkbox"/> Tina Churches	BRADENTON	\$55,722	276	18	11/28/10	3/13/11 4:37 PM	Just Looking	Active	

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.

mykw myContacts Powered by market leader. Welcome Maureen Legac at Sarasota Lakewood Ranch MC#373 [Log Out]

You are currently: Available Help and Support

realtygenerator Contacts

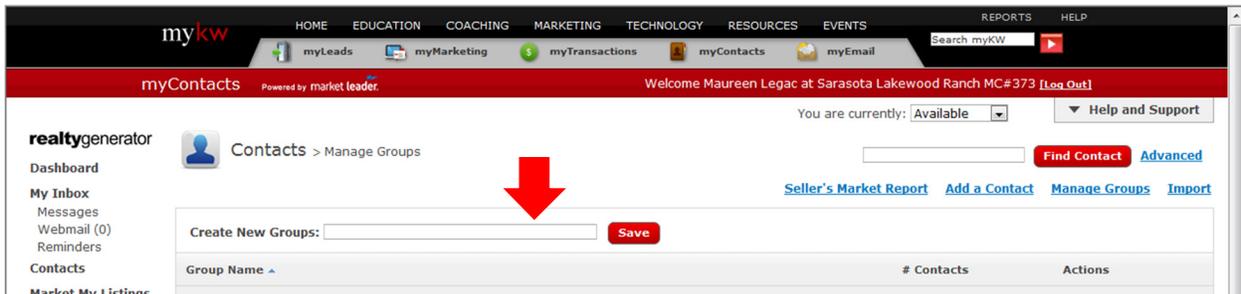
Dashboard
My Inbox
Messages
Webmail (0)
Reminders
Contacts
Market My Listings
Search MLS
Create Marketing
Admin
Website
Email
Performance
Evaluator

Contacts (42) Status: All Groups: Select options

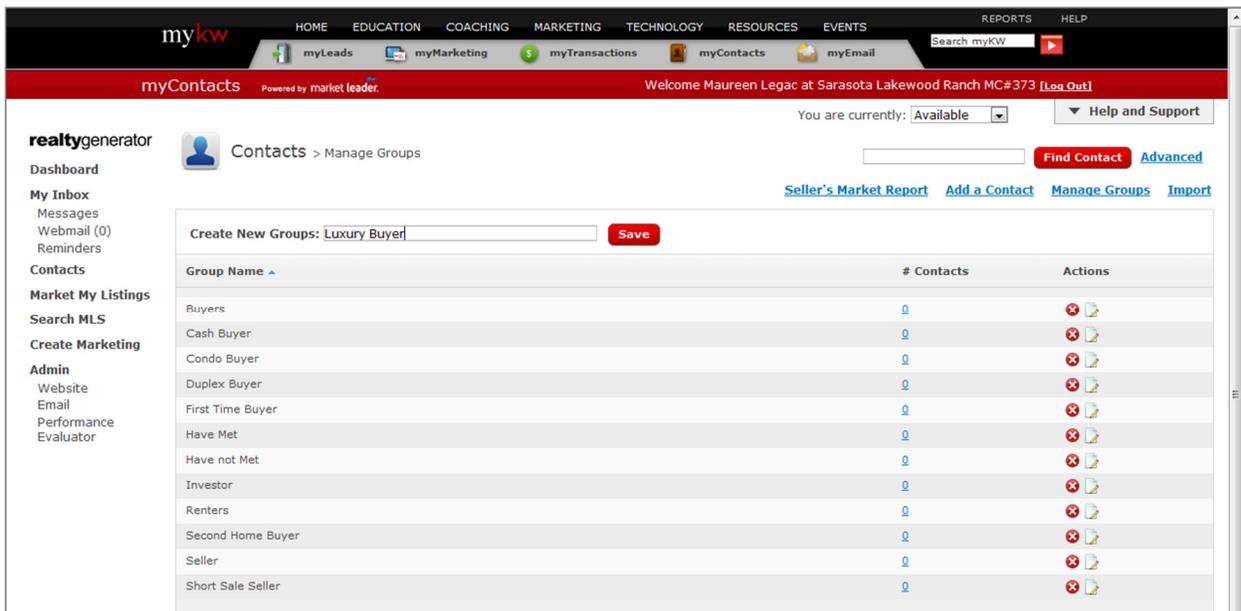
Contact	Looking In	Avg Price	View	Save	Created	Activity	Time Frame	Status	Actions
<input type="checkbox"/> Tina Churches	BRADENTON	\$55,722	278	18	11/28/10	3/13/11 4:46 PM	Just Looking	Active	
<input type="checkbox"/> Dave Saqliani	BRADENTON	\$124,407	21	0	1/12/11	3/13/11 1:04 PM	Now	Active	
<input type="checkbox"/> Kristen Humbert	Sarasota	\$939	12	2	2/7/11	3/12/11	Now	Active	
<input type="checkbox"/> Rita Ranew	BRADENTON	\$196,671	179	27	12/5/10	3/12/11	Just Looking	Trash	
<input type="checkbox"/> Tim Brooks	BRADENTON	\$304,197	25	0	2/3/11	3/11/11	Now	Active	
<input type="checkbox"/> Mujo Mizic	BRADENTON	\$151,237	66	0	12/4/10	3/11/11	Now	Active	

Add Groups Remove Groups

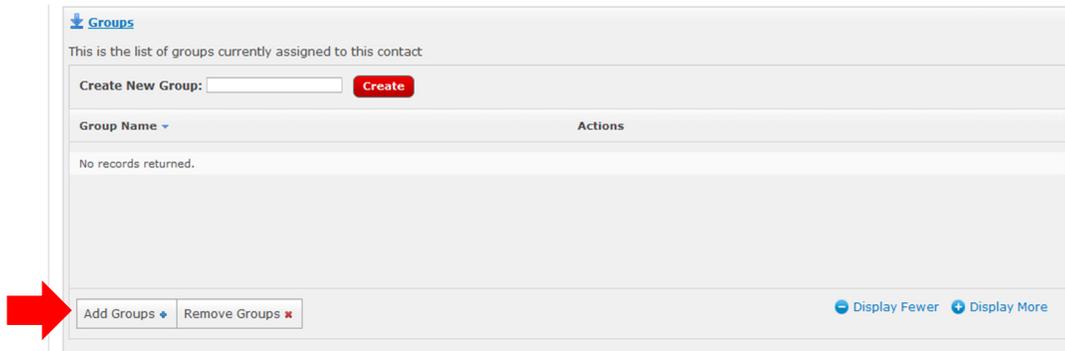
At the bottom of your list of contacts, click on the “Add Groups” link. A pop-up window will appear. Click on “Manage All Groups”. A window will that will allow you to add new groups. Remember that the group will be used for marketing too – so make the groups as specific as you feel you will need to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



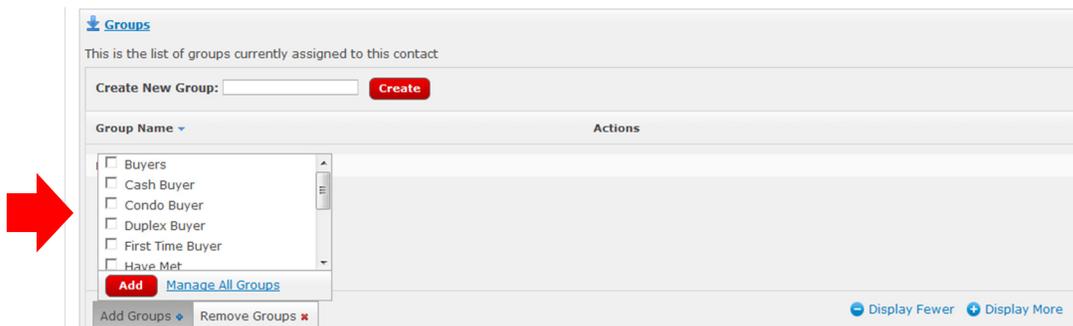
Add as many groups as you can think of based on the marketing you feel you may do. Contacts can belong to multiple groups. You could have a contact in the “Buyer” group, “First Time Buyer” group and “Have Met” group.



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.



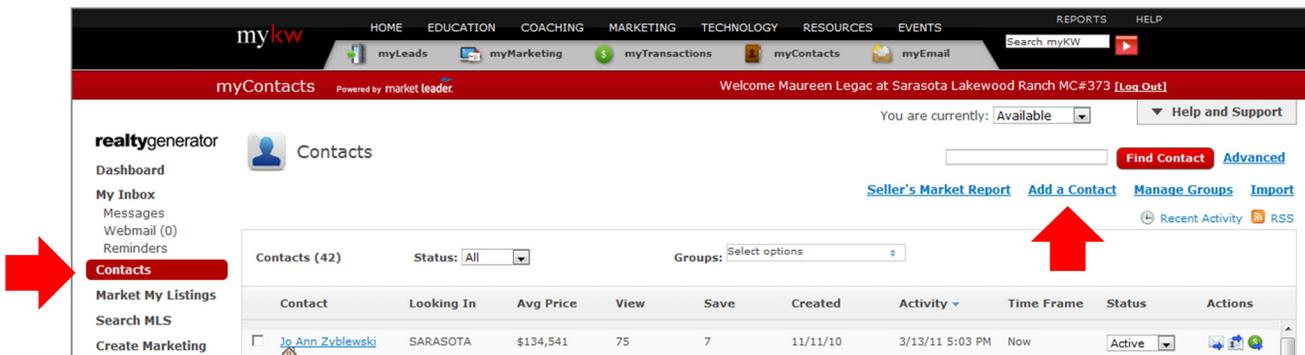
Click the “Add Group” link and a list of available groups will appear.



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)

The screenshot shows the 'Add a Contact' form in the mykw.com interface. The 'Status' dropdown menu is set to 'Lead' and is highlighted with a red arrow. The form includes the following fields and options:

- Status: Lead (dropdown menu, highlighted with a red arrow)
- Name: * (text input)
- Home Phone: (text input)
- Cell Phone: (text input)
- Work Phone: (text input)
- Email 1: * (text input)
- Email 2: (text input)
- Email 3: (text input)
- eSignature Email: * (text input)
- Address Title: (text input)
- Address: (text input)
- City: (text input)
- State/Prov: Select One (dropdown menu)
- Zip/Postal Code: (text input)
- Timeframe: Now (dropdown menu)
- Zip/Postal Code: (text input)
- Has Agent?: No (dropdown menu)
- Has Requested Pre-approval?: No (dropdown menu)
- Selling Home?: No (dropdown menu)

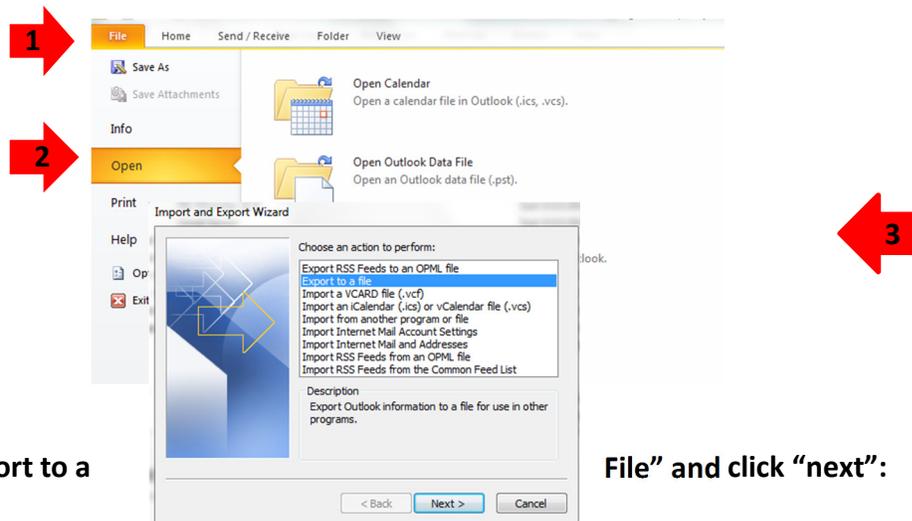
When you have finished adding your contact information, click “Save” at the bottom of the page. You will then be dropped onto that contact’s summary page. Remember to go to the bottom of that page and assigned a group(s) to that contact.

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.

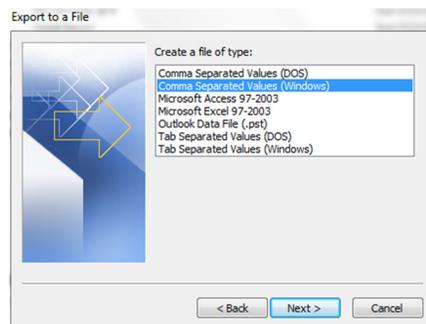
Each contact manager has a different method of exporting the contacts. In Outlook 2010, I was able to export the contacts by clicking “File” at the top of the outlook page...



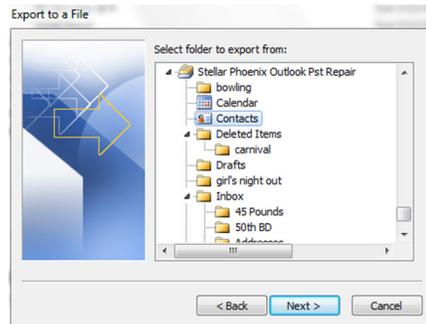
Then click “Export to a

File” and click “next”:

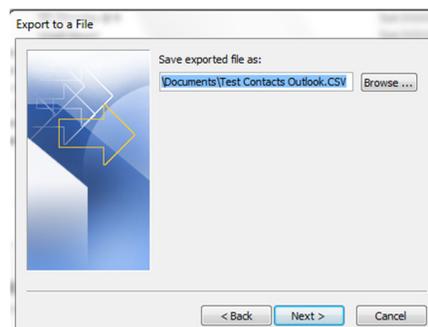
Next, click the type of file you wish to export. I picked Comma Separated Values (CSV) for Windows. Click “next”



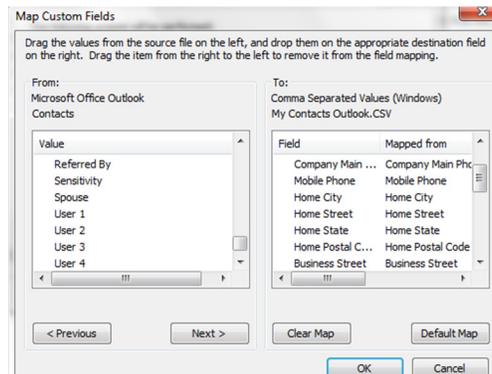
Next, select the folder you wish to export from. I selected “Contacts”. Click “next”.



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 *.csv file and click “Import”

myContacts Powered by market leader. Welcome Maureen Legac at Sarasota Lakewood Ranch MC#373 [Log Out]

You are currently: Available [v] Help and Support

realtygenerator

Contacts > Import

Import Contacts

You can import contacts listed in a CSV (comma separated values) file.

You can upload an unlimited number of lists, but the total number of rows per list can not exceed 10000 rows. The file size must be less than 10MB. The file upload process could take several minutes depending on your file size. **Please do not navigate away while the file is uploading.** When complete the page will refresh with message indicating the upload has completed.

1. Assign a group to imported contacts Have Met [v]
2. Set contact status Inactive [v]
3. Select a CSV file to upload

Import File Type: Custom CSV [v]

The file must contain data in the following order (fields in bold are required): **First Name, Last Name**, Home Phone, Work Phone, Cell Phone, Address 1, City 1, State 1, Zip 1, Address 2, City 2, State 2, Zip 2, Address 3, City 3, State 3, Zip 3, **Email Address 1**, Email Address 2, Email Address 3, Password

Note: **First Name, Last Name, and Email Address OR Physical Address** are required. For example, if you have a contact without an Email Address to import, a Physical Address must be present. Contacts without an Email Address or a Physical Address will not be imported.

A template of this format can be downloaded here: [Custom Import Template](#)

Please review your file for contact information accuracy **before** importing.

Select File to Upload: C:\Users\mlk [Browse...]

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

Imported Jobs

This is the list of your contact import jobs within the last 30 days. You will need to refresh the page to see if the status has changed.

Status	Job Start Date	Job End Date	Agent	Imported	Failed	Actions
⚠ Done, with errors	3/13/11 6:07 PM	3/13/11 6:10 PM	Maureen Legac	150	24	



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

Import Error Report

Row #	Contact Name	Message Type	Error
99	Jean-Marie Steele	invalid	Email contains an invalid or restricted character/phrase.
36	Lorene Silverman silverml@manateeschool.	Error	A prospect Email addresses is already associated with the Subscription you are trying to add the Prospect to.
20	Maureen and Mark Legac mlegac@tampabay.rr.cor	Error	A prospect Email addresses is already associated with the Subscription you are trying to add the Prospect to.
171	Mary dave-n- mary@verizon.net	Error	The following required field was empty: Last Name
170	Jonna jonnab@boydinsurance.c	Error	The following required field was empty: Last Name
168	Don F don.fuchs@verizon.net	Error	A prospect Email addresses is already associated with the Subscription you are trying to add the Prospect to.
165	Calice K calice108@yahoo.com	Error	A prospect Email addresses is already associated with the

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.

The screenshot shows the contact summary page for 'MO Legac'. The left sidebar contains navigation options: Market My Listings, Search MLS, Create Marketing, and Admin (Website, Email, Performance Evaluator). The main content area has tabs for Summary, Listings - Alerts (1), Saved (0), Viewed (1), and History. The contact details include: Name: MO Legac; Email 1: mo@legat.com (Primary); eSignature Email: mo@legat.com; Address: [Redacted]; Status: Retry; Timeframe: Now; Moving From: [Redacted]; Created: 3/2/11 1:51 PM; Looking In: BRADENTON; Source: Offline Marketing; Has Agent?: No; Last Action: 3/2/11 2:33 PM; Has Requested Pre-approval?: Yes; Eligible for Alerts?: Yes; Has Mortgage Lender?: No; Eligible for System Emails?: Yes; Selling Home?: Yes; Listing Addresses?: On. On the right, there is a 'Send Listings' button and a list of actions: Start myTransaction, Go to Campaigns, Send Email, Transfer, Print, Send to Lender, Export V-Card, Resend Welcome Email, and Stop System Emails. Below this is a 'Current Reminders' section with two reminders: one from 3/4/11 10:58 AM and another from 3/5/11. Each reminder has a green checkmark and a red X icon. An 'Add a Reminder' button is at the bottom. A red arrow points to the 'Summary' tab, another to the 'Edit' button, and a third to the actions menu.

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.

The screenshot shows the myContacts interface for contact MO Legac. The top navigation bar includes the myContacts logo, user information, and status. The left sidebar contains navigation options like Dashboard, My Inbox, Contacts, and Admin. The main content area shows a message from MO Legac and a section for Listing Alerts and Listings Viewed. A red arrow points to the 'Listings - Alerts (1), Saved (0), Viewed (1)' tab. Another red arrow points to the 'Actions' column of the 'Current Listings Alerts (1)' table, specifically to a paper and pencil icon.

Name	Location	Property Type	Beds	Baths	Min Price	Max Price	Frequency	Actions
First Listing Alert	34202	Single Family	3+	2+	No Min	No Max	Daily	

MLS#	Location	Type	Price	Beds	Baths	Sq Ft	Times Viewed	Last Viewed	Actions
This contact did not save any listings.									

MLS#	Location	Type	Price	Beds	Baths	Sq Ft	Times Viewed	Last Viewed	Actions
M5811986	BRADENTON, 34208	Condo/Townhouse/Co-Op	\$60,000	2	2	1100	1	3/2/11 1:51 PM	

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.

Edit Listing Alert



Alert Name: First Listing Alert	Property Type: <i>(show only)</i> <input checked="" type="checkbox"/> Single Family <input type="checkbox"/> Condo/Townhouse/Co-Op <input type="checkbox"/> Multi Family <input type="checkbox"/> Lot/Land/Acreage <input type="checkbox"/> Farms/Ranch <input type="checkbox"/> Mobile/Manufactured <input type="checkbox"/> Residential Income <input type="checkbox"/> Commercial <input type="checkbox"/> Vacation/Time-Share <input type="checkbox"/> Rental Properties	Price: Min <input type="text"/> to <input type="text"/> Max	Features: <i>(show only)</i> <input type="checkbox"/> Air Conditioning <input type="checkbox"/> Basement <input type="checkbox"/> Fireplace <input type="checkbox"/> Garage <input type="checkbox"/> Swimming Pool <input type="checkbox"/> View <input type="checkbox"/> Barn/Equestrian <input type="checkbox"/> Master On Main <input type="checkbox"/> Waterfront
Alert Frequency: Daily	Listing Type: <i>(show only)</i> <input checked="" type="checkbox"/> Resale/New <input checked="" type="checkbox"/> Foreclosure/Bank Owned <input checked="" type="checkbox"/> Short Sale <input type="checkbox"/> Lease/Rental <input type="checkbox"/> Auction	Beds: 3+	Baths: 2+
Area:* Enter a city, neighborhood, or ZIP Add more areas 34202 (Bradenton, FL)	Sq ft: No Min to No Max	Lot Size: No Min to No Max	Open Houses: <i>(show only)</i> <input type="checkbox"/> Open Houses
	Schools:	Remarks:	Senior Housing: No
		Stories:	Land Tenure: No Preference
		Subdivision:	

Update Alert Cancel



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.

myContacts Powered by market leader. Welcome Maureen Legac at Sarasota Lakewood Ranch MC#373 [\[Log Out\]](#)

You are currently: Available

realtygenerator MO Legac [Back to List](#) [< Previous](#) [Next >](#)

MO is looking for a \$60,000 Condo/Townhouse/Co-Op with at least 2 beds and 2 baths in BRADENTON.

This contact is looking to sell a house. Try to get this contact to list with you. You can prepare a [Seller's Market Report](#) to show how you can use your website to effectively market this contact's property.

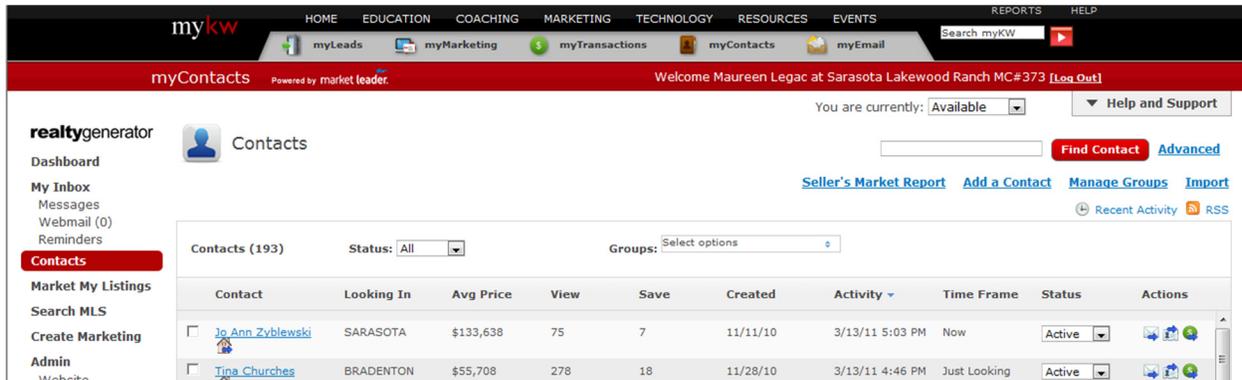
Summary Listings - Alerts (1), Saved (0), Viewed (1) **History** [Send Listings](#)

This is a list of your contact's events in the system since they became a contact.

Date	Description
3/2/11 1:51 PM	Prospect created a listing search.
3/2/11 1:51 PM	mo legac registered on mlegac.sarasotakw.com. This prospect came from the following URL: /listing/mlsid/149/propertyid/M5816561/.

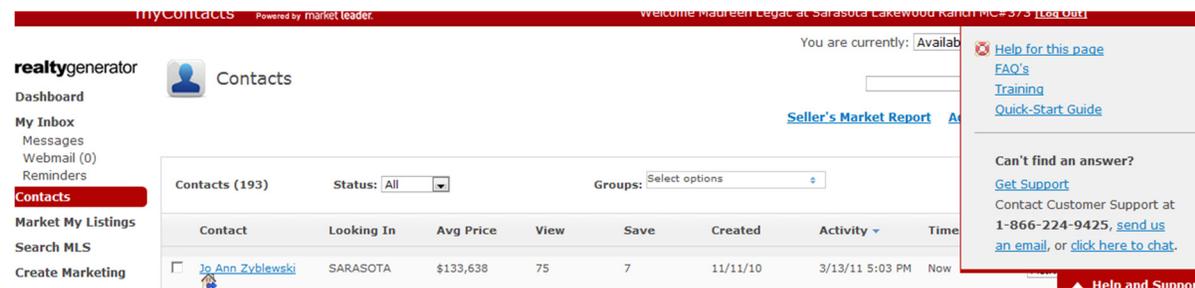
Training

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.

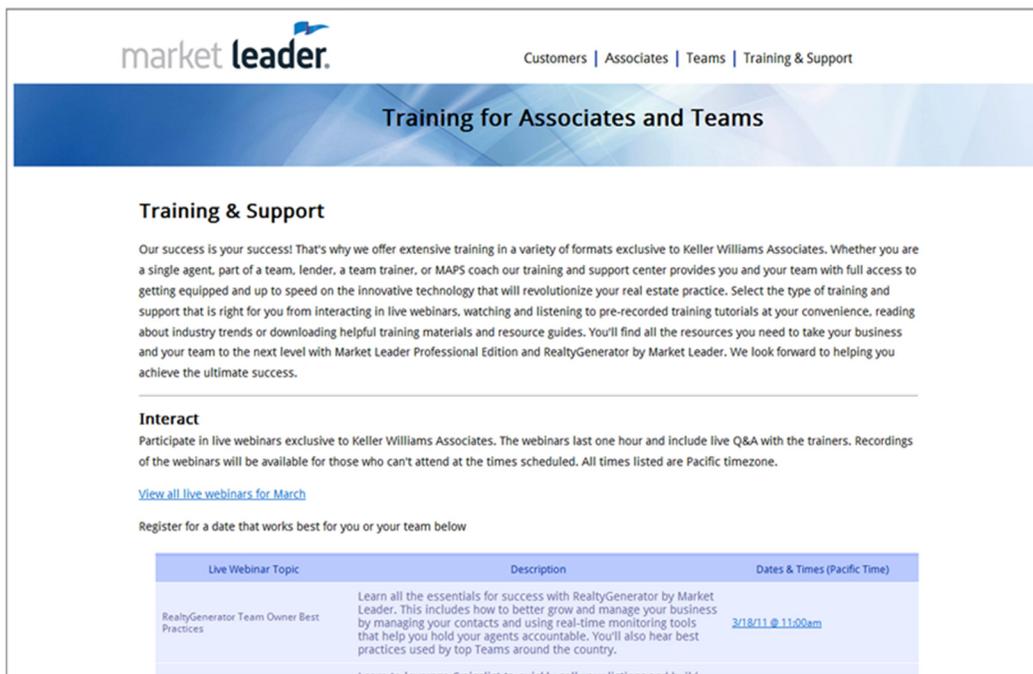


The screenshot shows the myKw dashboard interface. At the top, there is a navigation bar with tabs for HOME, EDUCATION, COACHING, MARKETING, TECHNOLOGY, RESOURCES, EVENTS, REPORTS, and HELP. Below this is a secondary navigation bar with icons for myLeads, myMarketing, myTransactions, myContacts, and myEmail. The main header area displays the user's name, Maureen Legac, and a 'Log Out' link. A dropdown menu is open under the 'Help and Support' tab, with a red arrow pointing to it. The dropdown menu contains links for 'Help for this page', 'FAQ's', 'Training', and 'Quick-Start Guide'. Below the dropdown, there is a 'Can't find an answer?' section with a 'Get Support' link and contact information for customer support.

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



This screenshot is similar to the previous one, but the 'Training' link in the 'Help and Support' dropdown menu is highlighted with a red arrow. The rest of the dashboard interface, including the navigation bar and the main content area, remains the same.



The screenshot shows the Market Leader Training & Support page. The header includes the Market Leader logo and navigation links for Customers, Associates, Teams, and Training & Support. The main heading is 'Training for Associates and Teams'. Below this, there is a section titled 'Training & Support' with a paragraph of text describing the training and support services. A section titled 'Interact' describes live webinars and provides a link to view all live webinars for March. At the bottom, there is a table with columns for 'Live Webinar Topic', 'Description', and 'Dates & Times (Pacific Time)'. The table contains two rows of webinar information.

Live Webinar Topic	Description	Dates & Times (Pacific Time)
RealtyGenerator Team Owner Best Practices	Learn all the essentials for success with RealtyGenerator by Market Leader. This includes how to better grow and manage your business by managing your contacts and using real-time monitoring tools that help you hold your agents accountable. You'll also hear best practices used by top Teams around the country.	3/18/11 @ 11:00am
	Learn to leverage Craigslist to quickly sell your listings and build	