

Quickstart Guide

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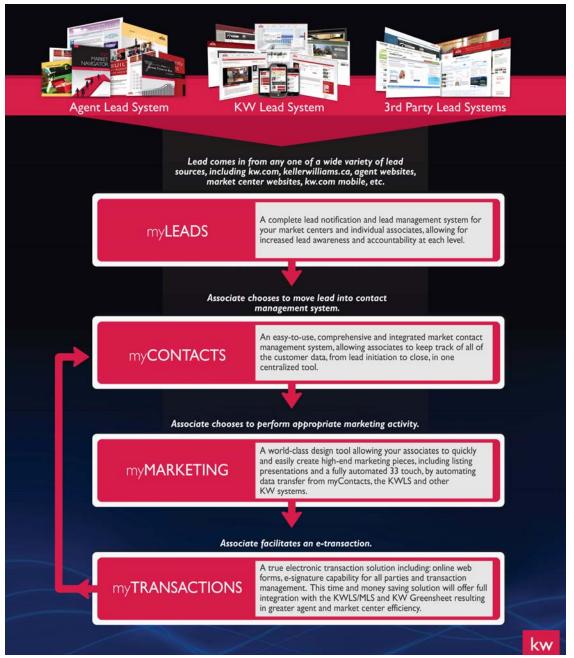
Lesson I: What is eEdge



What is eEdge?

eEdge is the real estate industry's first and only COMPLETE lead-to-close agent business solution available exclusively to Keller Williams associates. It includes lead management and routing capabilities, full contact management, a professional marketing library and a true paperless transaction system--all in one integrated, efficiency-increasing package.

It is a single, integrated system that does business the way you do business.



The triangle represents your real estate business. At the core of our business is myContacts which is fed by myLeads which are then cultivated by myMarketing and closed through myTransactions, allowing us to leverage our time and focus on what matters most. From the Millionaire Real Estate Agent book, we know that our business is our database. So everything you do, is centered around myContacts.





Your eEdge Control Panel

Each day, login to mykw.kw.com. Right there on the homepage, you'll see your eEdge dashboard.

	N RESOURCES MARKETING TEC	CH EVENTS	REPORTS HELP
			Search
eEdge			~
Market LeaderQA10 Percentage Complete 26% [Edit My Profile]	myControlPanel - Market Center: myLeads (1) New Lead	21 • myMarketing (3) <u>New Listings</u> [show options]	myBusiness myOffice myTransactions (4) <u>Messages</u> [show options]
Activity Cap Info Listing and Sales Jan by Month Jan Units Volume Listings Taken 0		and the second se	dge Messages
Listings Sold 0 0	this week @ kw.	Thursday, January 27 2011	Agent Referral Search
Sales Written 0 0 Sales Closed 0 0 • My Communities Distressed Property Community MC 1 Web Office	e Edge	KAAL AL IN ICLIED VOLU	atured Vendors

You have simple button controls linking to the modules of eEdge. Prominently displayed alerts indicate necessary actions. So, for example, the myLeads icon will notify you of any new leads captured, the myMarketing icon will prompt you to prepare marketing materials for new listings and the myTransactions icon will display any actions required during the contract process. From your control panel, you always have direct access straight into your contacts and email.

Important Note: myTransactions will be rolling out regionally. To see when your region is scheduled to go-live visit the eEdge page on myKW.



Each of the eEdge modules is integrated with the others. So, for example, when you create marketing for a listing, the information is automatically pre-populated from myContacts. From myContacts, you can open up the current e-Transaction right from the contact record in one click. No matter where you are in the eEdge system, you will also always find easy access to any other eEdge module through the top toolbar.

	mykw	HOME	EDUCATION	COACHING arketing	MARKETING		RESOURCE		REPORTS F
	myTrans ctior	1S Powered by d	ot 🞰				Welcome	John Smith in Market	Ce ter: 5137 [Log
Dashboard My Inbox	MA Dashboa	ard							
Messages Webmail (0) Reminders	New Leads (0) Contacts that are stil	l in the "lead" ca	ategory and need	action.					<u>View all</u>
Contacts	Contact	Looking In	Avg Price	View	Save	Created -	Activity	Status	Actions
Manage Listings	No records returned.								
Search MLS									
Create Marketing									
Admin Website Email Site Activity								Display Fewer	Display More

If You Need Help

As you learn the eEdge system, eEdge Support is always here to help! You'll find easy links to resources, training, and live support on any screen of eEdge.

			MARKETING Marketing	3 myTransa	ctions	myContacts	실 myEmail	Search myKW		
my Pashboard Iy Inbox Messages	Contacts Powered by marke	t leader.		Welcor	ne Alexis Mao			stin Southwest MC:	✓ He Find Contact	lp and Support
Webmail (0) Reminders ontacts							<u>arket Report</u>	<u>Add a Contact</u> <u>M</u>	anage Groups Recer	Import/Export
larket My Listings	Contacts (3)	Status: All			Groups: Select	options	\$			
earch MLS reate Marketing	Contact	Looking In	Avg Price	View	Save	Created 🗸	Activity	Time Frame	Status	Actions
dmin	Joe Doe		\$0	0	0	2/16/11	-	Now	Lead 💌	🛶 💼 🚱
Website Email	Jim Doe		\$0	0	0	2/16/11	-	Now	Lead 💌	🛶 💼 🚳
Site Activity Performance Evaluator	Jane Doe		\$0	0	0	2/16/11	-	Now	Active 💌	ig 😭 😫



5 Daily eEdge Actions

There's a lot of functionality in eEdge that you can take advantage of! But get started quickly each day by completing the 5 Daily eEdge Actions:

- I. Login to your eEdge account every morning and evening.
- 2. Respond to New Leads and update their Status.
- 3. Reply to new email from Contacts. Don't forget to check your Webmail too!
- 4. Take action on current Reminder! Be sure to setup future Reminders!
- 5. Prepare any marketing material for new listings or listing appointments.

And, once you launch myTransactions in your region, there's a sixth!

6. Check myTransactions and address any notifications.



Lesson 2: Activating eEdge



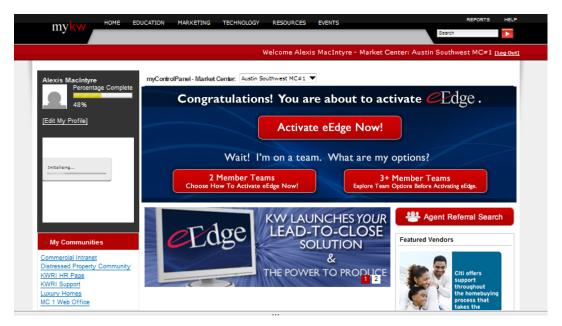
Activating eEdge



Are you on a team? Teams will have unique considerations. Before any members of the team activate their account, it is critical you review the Team Options at the end of this lesson.

Congratulations! You're ready to get started in eEdge. First, you'll need to activate your account. To do so:

I. Log into mykw.kw.com. Click Activate eEdge Now.



2. Click **Get Started with eEdge**. (If you are on a team, be sure to first decide which option will best suit your team's needs.)





Congratulations! You are about to activate eEdge in your business!

Are you an individual agent?	Are you a member of a 2-person team?	Are you a member of a larger team?
You Are Ready to Activate!	Option 1: Each team member activates eEdge as an individual agent.	Talk to the lead agent of your team about configuring your team accounts before activating your eEdge account
	Option 2: One agent activates eEdge and shares account (2 MLS IDs allowed.)	Option 1: Each team member activates eEdge as an individua agent (no shared CRM).
		Option 2: RealtyGenerator by Market Leader is an add-on to eEdge for teams. Contact Market Leader at (800)-985-0469 or <u>click here</u> to learn more. (\$200/mo. savings for KW associates only)

3. Click to continue with eEdge setup. If you choose, you may also take advantage of the addons Market Leader offers in the Professional edition or with Realty Generator. This is not required and you may always choose the system add-ons at a later date. If you are part of a team, review the Team Options guide at the back of this lesson for more detail.





4. Complete all required information. For Contracting Party field, enter your own name.

IS AGREEING TO BE BOUND BY THE T 1. Subscription to Market Leader Product Client hereby agrees to license the N estate website and integrated CRM to	
Contact Information	Mailing Address
Name	Address Unit
Alexis MacIntyre	807 Las Cimas Parkway Sui
Office Phone Number	City
512-448-4222x123	Austin
Email Address test@kw.com Company	State/Province Zip/Postal Code TX 78746 Country
	Country
Contracting Party] 0
Signature	By typing your name in the signature box you agree that
type your name	you are (or by typing your name in the signature box on behalf of a legal entity, you agree that such entity is) legally bound by our Agreement, including the Terms and Conditions, pricing information and other provisions above

- 5. Complete your website setup. Your eEdge website serves as an additional lead source and capture system for you. You are also provided with an email address that will allow you to track all correspondences within the eEdge system (for more, see subsequent lessons).
 - a) Enter the primary zip code in which you conduct business.
 - b) Decide your eEdge subdomain. This will be the link for your eEdge website. Be sure you DO NOT enter www or http into the field.
 - c) What you decide for your eEdge subdomain will also be your eEdge email address.
 - d) Click Finish Setup.



ebsite Setup			
ou are almost done!			
ase provide a few more details so we	can enable your site.		
Complete Site Setup			
Your site will be active when the foll	owing information is provided:		
r a de la constante de la const			
Enter the zip code of an area or neig 21043	iborhood that you service		
21013			
Enter Desired SubDomain			
	.kwrealtycom		
New Market Leader Email	@kwrealty_com		
	(d)kwrealty com		
Finish Setup			

Congratulations, you're now ready to begin using eEdge!

market leader.	Congratulations Your Site Setup is Complete!
You are now ready to get s	started with your new Market Leader system.
	an access all your eEdge tools (and any Market Leader upgrades you a your myKW Control Panel using your Keller Williams Realty username ://mykw.kw.com.
We look forward to supporting The Market Leader Team	g your success!
-	ider, Inc. 11332 NE 122nd Way, Suite 200, Kirkland, WA 98034. h Leader, RealtyGenerator and JustListed are among the trademarks or registered er. Inc.



eEdge for Teams

Teams of two agents may have their own accounts or share one eEdge account.

Option I

If you are on a two-person team and choose to have individual eEdge accounts:

- Members of the team maintain individual eEdge websites and eEdge email addresses.
- Members of the team maintain separate lead flows, databases, marketing portfolios and transactions
- Choose this set-up if you book your production separately

Option 2

If you are on a two-person team and choose to share one eEdge account:

- Members of the team choose a "lead agent" who will activate on eEdge
- Within the eEdge website admin tool, agents add both MLS IDs to pull both listings
- Members of the team share an eEdge website, eEdge email address, lead flow, database, marketing portfolio via the "lead agent's" account
- Choose this set-up if you book all your production under one "lead agent"

<u>Teams of three or more agents may have their own accounts or share one eEdge</u> <u>account.</u>

If you are the lead agent of a three-person or larger team, you will want to advise your team on how you'd like to configure the team accounts.

If you are a member of a three-person or larger team, consult with your lead agent before activating on eEdge for a decision on how the team will configure the team's eEdge account(s).

Option I

All team members have their own eEdge accounts:

- Members of the team maintain individual eEdge websites and eEdge email addresses.
- Members of the team maintain separate lead flows, databases, marketing portfolios and transaction documents and records

Option 2

If you are on a large team and you would like to have a shared database and team dashboard, Keller Williams Realty has a KW-exclusive (\$500/mo. savings) on Market Leader's RealtyGenerator product which is fully eEdge-compatible and includes the Professional Edition of Market Leader for all team members.

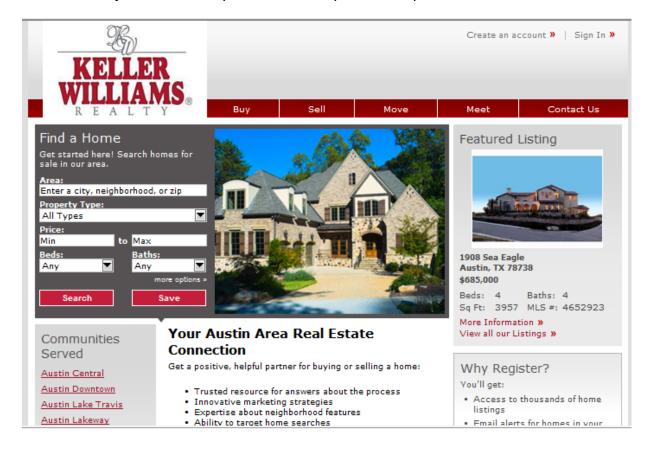


Lesson 3: eEdge Set-Up



Your eEdge Website

Your eEdge website is an additional lead capture source for you. You will be able to use this website in conjunction with any other websites you currently use.





Access the Admin Page

Before you get started in eEdge, set your administrative settings properly to ensure your leads are directed to you. To access your admin settings:

1. Click on myContacts on your control panel.

myControlPanel - Market Center: 21 -	myBusiness myOffice
myLeads (1) New Lead (3) New Listings [show options]	(4) <u>Messages</u> [show options]
MyContacts View Contacts Add New Contacts	myEmail (11) <u>eEdge Messages</u> KWEmail

2. From the myContacts dashboard, you'll see your **Admin** settings in the left hand navigation.

Dashboard My Inbox	MA Dash	nboard							
Messages Webmail (🏷) Reminders	New Leads (3 Contacts that a) re still in the "lead" c	ategory and need a	action.					View
Contacts	Contact	Looking In	Avg Price	View	Save	Created -	Activity	Status	Actions
Manage Listings	TJ Swing		\$0	0	0	2/4/11	-	Lead 💌	Q
Search MLS	Samantha Sellerprospect		\$0	0	0	2/4/11	-	Lead 💌	Q
Admin Website	Samantha Sellerprospect		\$0	0	0	2/4/11		Lead 💌	G
Email Site Activity Performance								Display Fewer	er 😗 Display Mo
Evaluator	New message	s (0)							Viev
	Contact	ls you have received Message	from contacts that	t need action.				Date 🗸 🖌	ctions



Your Website Settings

Your eEdge website is ready to go with just a few small updates!

1. At any time, you can preview your website by clicking on "View your website" link. Do this often as you make changes so you can see how they affect your site.

My Inbox Messages	X Autom			•
Webmail (0) Reminders	Website Email	Site Activity Perfor	mance Evaluator	
Contacts	General Info		t Contact Information for Your Office	
Manage Listings Search MLS	Profile Info Titles and Descriptions	You can edit the co Company Name:	mpany information that appears on your v bsite. <u>View your website.</u> Keller Williams Realty	
Create Marketing	Main Text	Address:	275 Ridge Road, ,	
Admin •• Website	<u>Sell Text</u> Site Images	City:	Elliott City	
Email Site Activity	Search Widget	State/Province:	MD	
Performance Evaluator	Alerts Communities Served	ZIP Code:	21043	=
	Featured Partners	Office Phone:	4435741600	
	Listing Address Listing Search Areas Listing Search Fields	Fax: Notes (affiliations, comments, etc.):		
		Office MLS ID: Time Zone:	(GMT-08:00) Pacific Time	
		Edit		Ŧ

2. Ensure your office information is correct and make any necessary updates by clicking **Edit.**

y Inbox Messages Webmail (0)				
Reminders	Website Email	Site Activity Perfor	mance Evaluator	
ontacts	General Info	Review and Edi	t Contact Information for Your Office	
anage Listings	Profile Info	You can edit the co	mpany information that appears on your website. View your website.	
earch MLS	Titles and Descriptions	Company Name:	Keller Williams Realty	
reate Marketing	Main Text	Address:	275 Ridge Road, ,	
dmin	Sell Text			
Website	Site Images	City:	Elliott City	
Email Site Activity	Search Widget	State/Province:	MD	
Performance	Alerts	ZIP Code:	21043	
Evaluator	Communities Served			
	Featured Partners	Office Phone:	4435741600	
	Listing Address	Fax:		
	Listing Search Areas	Notes (affiliations comments, etc.):		
	Listing Search Fields			
		Office MLS ID:		
		Time Zone:	(GMT-08:00) Pacific Time	
		Edit		

- 3. Update your time zone (if you are not in the Pacific time zone).
 - a) Under General Info, click Edit.

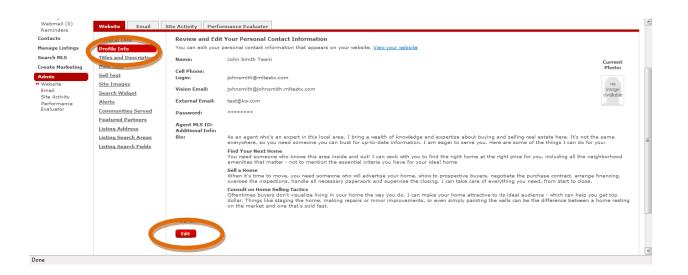


My Inbox Messages	X Autim			*
Webmail (0) Reminders	Website Email	Site Activity Perfo	rmance Evaluator	
Contacts	General Info	Review and Ed	it Contact Information for Your Office	
Manage Listings	Profile Info	You can edit the o	ompany information that appears on your website. View your website.	
Search MLS	Titles and Descriptions	Company Name:	Keller Williams Realty	
Create Marketing	Main Text Sell Text	Address:	275 Ridge Road, ,	
Website Email	Site Images	City:	Elliott City	
Site Activity	Search Widget	State/Province:	MD	
Performance Evaluator	Alerts Communities Served	ZIP Code:	21043	E
	Featured Partners	Office Phone:	4435741600	
	Listing Address Listing Search Areas	Fax: Notes (affiliation	in the second	
	Listing Search Fields	comments, etc.):		
		Office MLS ID:	(GMT-08:00) Pacific Time	
	6	Edit		
				÷

b) Choose the correct time zone and click Save.

Manage Listings	Profile Info	You can edit the cor	npany information that appears on your website. <u>View your website.</u>	
Search MLS	Titles and Descriptions	Company Name:*	Keller Williams Realty	
Create Marketing Admin	<u>Main Text</u> <u>Sell Text</u>	Address:* City:*	275 Ridge Road, , Elliott City	
 Website Email Site Activity Performance 	<u>Site Images</u> <u>Search Widget</u> Alerts	State:*	Maryland 🔍	
Evaluator	Communities Served	ZIP Code:*	21043	
	Featured Partners	Office Phone:*	4435741600	
	Listing Address Listing Search Areas	Fax:		
	Listing Search Fields	Notes (affiliations, comments, etc.):	B Z U Format Font ramey Font size	E
			田田 串∉ 9 0 ∞ ∞ ∞ Σ − Ω 2 mm ♥・	
		Office MLS ID:	Addation	
		Time Tone:*	(GMT-08:00) Pacific Time	
		Save Cricel		+
Done				

- 5. Update your profile.
 - a) Choose Profile Info and click Edit.



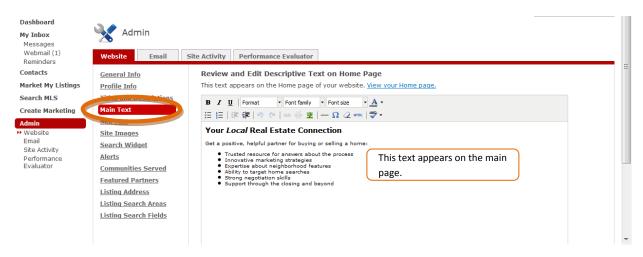
- b) Edit your name if necessary.
- c) Add your cell phone number.
- d) You do not need to edit your login or password.
- e) Add your Agent MLS ID. This will ensure your eEdge website properly displays your listings.
- f) Enter any additional info, if desired.
- g) Edit your bio.
- h) Add any awards, if desired.
- i) Add your photo.

inders acts	General Info	Review and Edit	our Personal Contact In	formation		
ge Listings :h MLS	Profile Info Titles and Descriptions	You can edit your per	sonal contact information the	b. Edit name if necessary		Current Photo:
e Marketing n site	Main Text Sell Text Site Images	Cell Phone: Login:*	johnsmith@mitestx.com	c. Add cell phone		The photo you upload must be a .jpeg file and should not exceed SMB. The photo will be
Activity ormance uator	<u>Search Widget</u> <u>Alerts</u> <u>Communities Served</u> <u>Featured Partners</u>	External Email:* Password:* Password Confirm:	test@kw.com	d. You do not need to edit your login or password		resized to 100 pixels wide by 130 pixels tall. For best results, upload a photo with a similar size ratio.
	Listing Address Listing Search Areas Listing Search Fields	Agent MLS ID:	Add Agent MLS ID	<u>, , , , , , , , , , , , , , , , , , , </u>		Browse Clear
		Additional Info:		e. Add Agent MLS ID	(i. Add your
				f. Add any additional info. This appears at the very bottom of each page on your website.		photo. This will appear on your homepage.
		Bio:		Forthand $ \text{ for table } \Delta $ = $\Im \mathbf{E} - \Omega \mathcal{Q} = 0 \nabla $		
			As an agent who's an expert in information. I am eager to sen Find Your Next Home You need someone who knows for your ideal home Sell a Home	g. Edit your bio as necessary. This appears on the	essential criteria you have	
		Awards:		retheny i fortaz i∆. ⇒ S B - Ω ∠ m ♥·		
				h. Add any awards. This will appear on the "Meet"		
				tab of your website.		





6. Update the Main Text, if desired.



7. Update the Sell Text, if desired.

Dashboard My Inbox Messages Webmail (1) Reminders	Admin Website Email	Site Activity Performance Evaluator
Contacts Market My Listings	<u>General Info</u> Profile Info	Explain Why Contacts Should List a Home with You This text appears on the Sell a Home page of your website and in the Seller's Market Report. <u>View your Sell a Home Page</u>
Search MLS Create Marketing	Titles and Descriptions	B / U Format · Font family · Font size · A · 注 注 读 读 ? ペ ∞ 炎 型 ー Ω ② xmm 梦・
Admin Website Email Site Activity Performance	Site moves Search Widget Alerts	When you're looking for a partner to help you negotiate the complexities of selling a home, you've come to the right place. The experience, dedication and strong communication you'll receive here will home: 1. The Local Advantage - Take advantage of a broad spectrum of technol start to close. ************************************
Evaluator	Communities Served Featured Partners	 Internet Advertising - Since the lion's share of home buyers starts their search on the internet, top placement on search engines is essential. You'll gain access to placement on Google, MSNBC, and other websites. This will maximize your exposure and bring a large number of potential buyers to view information about your home.
	Listing Address Listing Search Areas Listing Search Fields	 Email Campaigns - It's important to "work the network." We can work together to identify the right people to target your home-and get in touch with them by email to drive excitament and interest. Personal Touch - Of course, technology alone won't sell your home. Face-to-face interaction provides the advantage to sell your home-and you won't have to worry about a thing. The details will be handled with care and constant communication, to ensure the marketing and sale of your home go smoothly.

8. Add a site banner image and agency logo.



Dashboard My Inbox Messages Webmail (0) Reminders	Admin Website Email	Site Activity Performance Evaluator	
Contacts	General Info	Review and Edit Your Website Images	
Market My Listings	Profile Info	You can edit or upload images that appear on your website. View your website	
Search MLS Create Marketing Admin Website Email Site Activity Performance Evaluator	Titles and Descriptions Main Text Culture Site Images Search and Alerts	Site Banner: No Existing Image The Site Banner appears on your home page. Add	H
Evaluator	Communities Served Featured Partners Listing Address Listing Search Areas Listing Search Fields	Agency Logo: No Existing Logo The Agency Logo appears on every page of your site. Add	-

- 9. Set your alerts. The alerts notify you whenever you receive a new lead or a new email message through the system.
 - a) Choose alerts in the left-hand menu.
 - b) Enter the cell-phone number and email you want alerts sent to. You may choose up to three places to send alerts.

mhboard y Inbox Persens	O Information Image				
ebmail (0) counters stacts sage Listings	Admin Website Gmit				
arch MLS ada: Marioting Wh House House House Is Adavity relevance aduator	Beneral Inte Podia Inte Tuttas and Rescalators Man Ind Ref. Tad Ultras Communities General Mater Listics, Society Jones Listics, Society Jones	Cet. Rottined When You Receive a New Central When a sets, you ben't read to be haped on to the syste and the set and and the set of the set of the Period Set of the Set of the Set of the Cettor Receive And Set of the Set of the Set of the Set of the Set of the Set of the Set of the Set of the Set of the Set of the Set of the Set of the Set of the Set of the Set of the Set of the Set of the Set of the Set	Add Alert Tox Massage Alerts Cal prior number Defer your Codege cell phone number with no spaces or dashes (ext: 55555013) AND/OR Email Aderts Use any email address that you shock regularly.	Cal phone somer Select one	en omfatt signs op en yvar ska en en enkling omfatt sends yva, a message. Hen en sign og for ført message Refer

- 10. Add your Communities Served.
 - a) Click on Communities Served and Add Community.



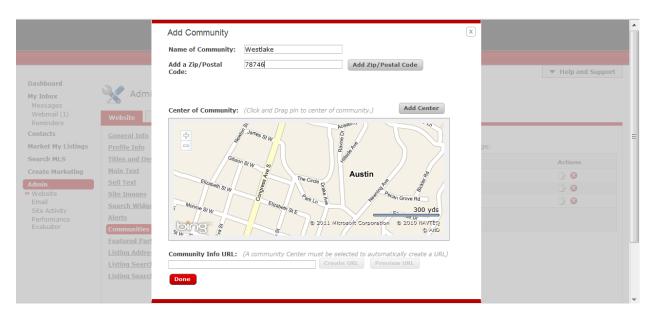
Dashboard My Inbox	Admin		 Telh and Sabhort
Messages Webmail (1) Reminders	Website Email	Activity Performance Evaluator	
Contacts	General Info	List the Areas You Cover	
Market My Listings	Profile Info	The following communities are listed in the Communiti	es Served section of your home page:
Search MLS	Titles and Descriptions	Community A Zip/Postal Codes	Actions
Create Marketing	Main Text	Cedar Park 78613	
Admin	Sell Text	Pflugerville 78660	
Website Email	Site Images	Round Rock 78664	
Site Activity	Search Widget		
Performance	-aertS	Add Community	
Evaluator	Communities Served		
	Feature		
	Listing Address		
	Listing Search Areas		
	Listing Search Fields		

b) Enter the name of your community.

Admin	e Actuite Berformance Firshistor		
Concentration of the local sector of the local	Add Community	x	
Profile Info	The Name of Community	ction of your home page:	
	c I		Actions
Main Text	Continue		0 0
Sell Text	P		0.0
	Riberto noce		D O
	Add Community		
and the second se			
	Website Email Sit General Info Profile Info Titles and Descriptions Main Text Sell Text	Website Email Site Arthrity Desformance Evaluator General Info Lis Add Community Profile Info Titles and Descriptions Main Text Stel Text Site Images Continue Ste Images Add Community Communities Served Featured Partners Listing Address Listing Search Areas	Website Email Site Arthuby Desfaremented Evaluator General Info Lis Add Community X Profile Info The Name of Community X Titles and Descriptions The Name of Community Continue Main Text Site Images Continue Site Images Continue Cancel Site Images Continue Cancel Communities Served Community Community Featured Partners Listing Address Listing Search Areas Community

- c) Add the zip code.
- d) If desired, add the center of the community and a link to a community site for more information.





11. Set your Listing Address setting.

Dashboard My Inbox Messages Webmail (1) Reminders	Admin Website Email 5	Site Activity Performance Evaluator
Contacts	General Info	Show or Hide Listing Addresses for Contacts
Market My Listings Search MLS Create Marketing Admin Website Email Site Activity Performance Evaluator	Profile Info Titles and Descriptions Main Text Sell Text Site Images Search Widget Alerts Communities Served	Set the default for displaying addresses on your website. If you only want some contacts to see addresses, set the default to Do not display addresses for contacts , and then change the Addresses setting on individual Contact Summary pages. O not display addresses for contacts By default new contacts will not be able to see addresses for listings on your site. You can turn on address display for individual contacts on each Contact Summary page. Display addresses for contacts By default new contacts will be able to see addresses for listings on your site. You can turn off address display for individual contacts on each Contact Summary page. Save
	Listing Address Listing Search Fields	Note: If your MLS rules do not permit the display of addresses, then this setting will have no effect. Addresses will not display on your website.

Your Email Settings

- 1. Listing Alert Campaign allows you to customize the messages that will be sent at 2weeks, 1-month and 3-months to all contacts who are not signed up for email alerts (with the exception of those who are marked with Hot, Sold or Trash status).
 - a) Choose the Email tab.
 - b) Customize the email alerts as desired and click Save Changes.



Webmail (?) Reminders	Website Email	te Activity Performance Evaluator
Contacts	Listing Alert Campaign	Encourage Contacts to Sign Up for Listing Alerts
Manage Listings Search MLS	<u>Message Templates</u> <u>Email Signature</u>	Listing alerts drive traffic to your site and keep your contacts informed about new listings that match their criteria. Over a 3 month period, the following emails will be sent to all contacts who are not signed up for email alerts after 2 weeks, 1 month, and 3 months
myMarketing		2 Weeks:
Admin		<i>₩</i>
Website Email Site Activity Performance Evaluator		Have you signed up to get daily email alerts of homes for sale? They can notify you immediately when new homes you may like come on the market. This is same tool I use every day to find homes for my clients. You can set alerts up below, or just let me know and I can set them up for you.
		Save Changes Revert to default text 1 Month:
		HBQ
		I just wanted to check in to see if you have come across any homes you would like to know more about. Also, if you have not set up the daily home alert emails yet, they might be really useful in your hunt for the right home. They notify you every time a new home matching your interests comes on the market. If you want to set them up, use the link below, or let me know what you are looking for and I can do it for you.

2. **Email Signature** allows you to customize the email signature that will be included on any emails automatically generated from the system. Change your email signature, if desired, and click **Save**.

Dashboard My Inbox Messages Webmail (?) Reminders	Admin Website Email	Site Activity Performance Evaluator
Contacts Manage Listings Search MLS	Listing Alert Campaign	Edit Your Signature that is Added to Every Email When you send an email message to a contact, the system adds the following text to the end. Messages automatically generated by the system also include this email signature. You can change your name or contact information, but keep in mind that all contacts see this information on each email they receive from you.
myMarketing Admin Website >> Email Site Activity Performance Evaluator		Market LeaderQA10 Keller Williams - QA10 Office phone: 5124484222x123 Email: mleaderqa10@mltestx.com Website: http://mleaderqa10.mltestx.com





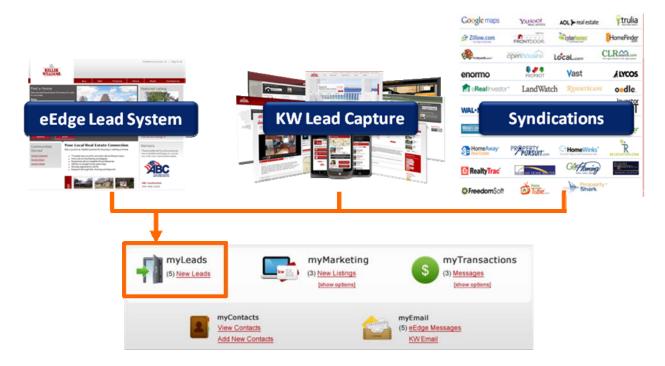


Lesson 4: myLeads



How Leads are Routed to You

Leads come in to your eEdge Control Panel from a number of different sources. You will receive leads from your eAgentC website and your eEdge website. You will also receive leads from the 40+ additional eAgentC sources. These include all the sites that the KWLS syndicates:





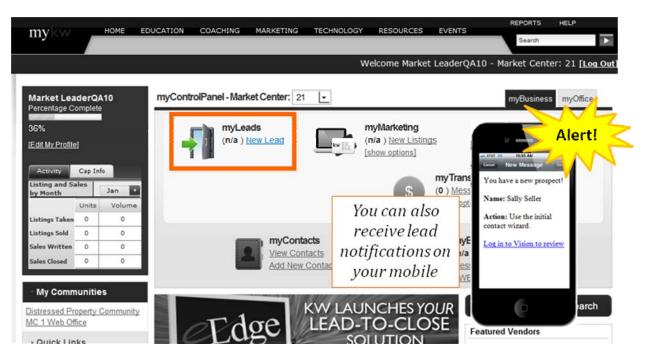
Lead Notifications

You will be notified of new leads in three ways.

I. Check the control panel for Lead Notifications.

myControlPanel - Market Center: 21 -		myBusiness myOffice
myLeads (1) New Lead	myMarketing (3) <u>New Listings</u> [show options]	(4) <u>Messages</u> [show options]
MyContacts View Contacts Add New Contacts		myEmail (11) <u>eEdge Messages</u> KWEmail

- 2. Via email and/or
- 3. Via text message (provided you have opted-in see the Admin Settings lesson).





The myLeads Dashboard

1. Click on the myLeads module of your eEdge Control Panel to access the myLeads dashboard.

myControlPanel - Market Center: 21 -		myBusiness myOffice
myLeads (1) New Lead	myMarketing (3) <u>New Listings</u> [show options]	(4) <u>Messages</u> [show options]
MyContacts View Contacts Add New Contacts		myEmail (11) <u>eEdge Messages</u> <u>KWEmail</u>

2. New leads that require action are listed at the top. A summary of the information collected at lead capture is included.

ashboard	MAY Das	hboard								
y Inbox Messages	New Leads (20)									View
Webmail (?) Reminders	Contacts that are	still in the "lead" of	category and need			-				
	Contact	Looking In	Avg Price	View	Save	Created	Activity -	Status		Actions
ontacts	S 2 3	Austin	\$270,000	1	0	2/10/11	2/10/11 10:33 AM	Lead	-	🖼 💼 Q
anage Listings	Terry Jones		\$0	0	0	2/10/11	2/10/11 10:30 AM	Lead	-	Q (1)
earch MLS	Ellen Marks		\$0	0	0	2/9/11	2/9/11	Lead		a 🔿 😋
eate Marketing	John Harralson		\$0	0	0	2/4/11	2/4/11	Lead		₩.E.Q
lmin Vebsite	New Lead		\$0	0	0	2/7/11		Lead	•	₩ # @
imail	1							Leau	<u></u>	
ite Activity erformance valuator								O Disp	olay Fewer	O Display Mor
valuator	New messag These are em		eceived from c	ontacts tha	t need acti	on.				View a
	Contact	Messa	ae					Date -	Ac	tions

3. Note that right on your leads dashboard, you also have access to your recent messages from contacts and any current reminders.



mail (?) inders	New Leads (12) Contacts that are still	in the "lead" categor	y and need action.						View all	market leader.
ts	Contact	Looking In	Avg Price	View	Save	Created	Activity -	Status	Actions	PROFESSIONAL EDITION
e Listings h MLS	Jeff Hughes	Austin	\$0	1	0	2/10/11	2/10/11 10:33 AM	Lead 💌	i i i i i i i i i i i i i i i i i i i	
Marketing	Terry Jones		\$0	0	0	2/10/11	2/10/11 10:30 AM	Lead 💌	₩ ₫ 9	Get Valuable Enhancements
site	Ellen Marks		\$0	0	0	2/9/11	2/9/11 3:44 PM	Lead 💌	i 🖓 📩 😫	to eEdge
Activity	John Harralson		\$0	0	0	2/4/11	2/4/11	Lead 💌	iii 😫 😫	More Listings
ator	New Lead		\$0	0	0	2/7/11	-	Lead 💌	iii 🖄 😫	More Leads
	Gary Keller		\$0	0	0	2/7/11		Lead 💌	¥ 🖞 🤮 🖕	
								😑 Dis	play Fewer 🔹 Display More	Learn More
	New messages (0) These are emails you I	have received from c	ontacts that need actio	n.					<u>View all</u>	
	Contact	Message						Date 🔻	Actions	
	No records returned.									
									play Fewer 🚯 Display More	
								UIS	piay rewer 😈 Display More	

Responding to Leads

- 1. The instant a lead registers, he or she is sent an immediate notification email and you are notified.
- 2. Click the lead's name to initiate contact.

Dashboard	MA Dash	board								
My Inbox	1.									
Messages Webmail (?)	New Leads (20) Contacts that are still in the "lead" category and need action.									
Reminders	sontact	oking In	Avg Price	View	Save	Created	Activity -	Status	Actions	
Contacts	S B	Austin	\$270,000	1	0	2/10/11	2/10/11 10:33 AM	Lead 💌	S 2 2 3	
Manage Listings	Terry Jones		\$0	0	0	2/10/11	2/10/11 10:30 AM	Lead 💌	Q 2 4	
Search MLS	Ellen Marks		\$0	0	0	2/9/11	2/9/11	Lead -	🖙 🟚 😋	
Create Marketing	John Harralson		\$0	0	0	2/4/11	2/4/11	Lead 💌	₩Ø.	
Admin Website	New Lead		\$0	0	0	2/7/11	÷	Lead	iii 🕸 😫	
Email Site Activity	Gary Keller		\$0	0	0	2/7/11		Lead -	Q 2 4	
Performance								Oisplay Fewer	O Display More	
Evaluator		New messages (0) These are emails you have received from contacts that need action.								
	Contact	Messa						Date - Ad	tions	



3. Click to open the Initial Contact Wizard (ICW).

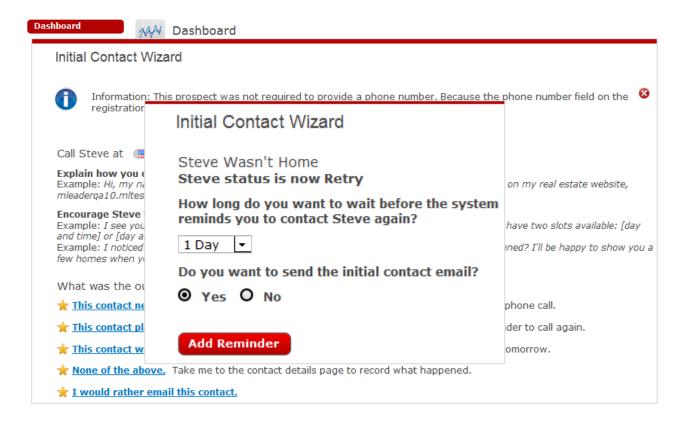
Stev	re Marshall	Back to List Next >
Steve is lookin	ng for a \$0 house.	
Use to 29	is a new contact from your website. the Initial Contact Wizard (ICW) to walk you through communicating with this of training a web contact into a client if live contact is made within the first ho 5%. In the ICW.	
use y	contact is looking to sell a house. Try to get this contact to list with you. You your website to effectively market this contact's property. Listings - Alerts (0), Saved (0), Viewed (0)	u can prepare a <u>Seller's Market Report</u> to show how you can Send Listings
Name:	Steve Marshall	Q Start
Home Phone	•	myTransaction
• 512-55	5-1212 🖸	Send Email
Email 1:	brenda.marshall01@gmail.com (Primary)	👼 Print
eSignature	brenda.marshall01@gmail.com	📩 Export V-Card
Email: Address:		📾 Resend Welcome Email
		Stop System Emails

4. If the lead has provided a phone number, the ICW gives you a script and prompts you to record the call outcome.

Initia	al Contact Wizard
0	Information: This prospect was not required to provide a phone number. Because the phone number field on the egistration form is optional, the phone number is probably correct.
Call	Steve at 📲 🛛 512-555-1212 🚱 (home).
Exan	a in how you obtained Steve's phone number. mple: Hi, my name is Market LeaderQA10. I am calling today because you signed up yesterday on my real estate website, iderga10.mltestx.com.
Exan and t Exan	burage Steve to meet you in person. mple: I see you saved a few homes. When would you like to go out and see them in person? I have two slots available: [day time] or [day and time]. Which time works best for you? mple: I noticed you are looking to move to this area. Do you have any house hunting trips planned? I'll be happy to show you a homes when you come out to visit.
Wha	at was the outcome of this phone call?
*1	his contact needs immediate help. Mark this contact as Hot and record that I made this phone call.
* I	his contact plans to look for homes later. Mark this contact as Active and create a reminder to call again.
* I	his contact was not home. Mark thiscontact as Retry and create a reminder to call back tomorrow.
★ N	Ione of the above. Take me to the contact details page to record what happened.
* <u>I</u>	would rather email this contact.



5. You are then given the option to set a reminder for follow-up.



6. If the lead has provided only an email address, the ICW will prompt you to send an email.

Initial Contact Wizard
Subject: Your Home Search
From: Market LeaderQA10
To: Ø brenda.marshall01@gmail.com
Hello, 💌
ABC -
You recently signed up at my Web site, http://mleaderqa10.mltestx.com/?ts=emicw How did the home search go? Did you come across anything interesting?
I noticed that you have not signed up to be notified by email when new homes come on the market. My home alerts will let you know about homes the same time I hear about them.
To set up your home alerts, either click the link below or go to the My Tools page on the Web site.
http://mleaderqa10.mltestx.com/mytools/?ts=emicw&consumerid=yX%2bm1kKsesJhc2Pcg0NnWm4p2ni3LGQQQ7jnLuIyE8A%3d
I also wanted to let you know there is a real human being behind the Web site. My phone number and email are below if you need to get in touch. Have fun searching!
Send Cancel Change prospect status to "Retry" after sending email.

Steve is looking for a \$0 house.

e

7. Be sure to change the status after you contact the lead. If you do not contact a lead within 12 hours, eEdge will automatically send them an email. eEdge will not automatically change a lead's status – that is only done by you.

Dashboard My Inbox Messages Webmail (?) Reminders	New Leads (4 Contacts that a		ead" category a		<u>View all</u>				
Contacts	Contact	Looking In	Avg Price	View	Save	Created 🔻	Activity	Status	Actions
Manage Listings	Steve Marshall		\$0	0	0	2/4/11	2/4/11 7:48 AM	Lead 🚽	न 🔍 🔍 🎽
Search MLS myMarketing	Brenda Marshall		\$0	0	0	2/4/11	2/4/11 7:45 AM	Lead Retry Active	S (
Admin Website Email Site Activity Performance	<u>Samantha</u> Sellerprospect		\$0	0	0	2/4/11	-	Inactive Hot Sold DispTrash	Display More
Evaluator	New message These are emain Contact			ntacts that	need action	n.		Date 🔻	View all Actions
	No records retu	irned.							

8. If you cannot service a lead yourself, you may choose to transfer it.

essages ebmail (?) eminders	New Leads (12) Contacts that are s	till in the "lead" category	and need action.						1	/iew all	market leader.
tacts	Contact	Looking In	Avg Price	View	Save	Created	Activity 🗸	Status	Actures		PROPESSIONAL EDITION
age Listings rch MLS	Jeff Hughes	Austin	\$0	1	0	2/10/11	2/10/11 10:33 AM	Lead 💌	₩ 🖻 😫	Â	
ate Marketing nin	Terry Jones		\$0	0	0	2/10/11	2/10/11 10:30 AM	Lead 💌	i 🖓 💼 🤮	=	Get Valuable Enhancements
ebsite	Ellen Marks		\$0	0	0	2/9/11	2/9/11 3:44 PM	Lead 💌	🛶 💼 🙆		to eEdge
e Activity formance	John Harralson		\$0	0	0	2/4/11	2/4/11	Lead 💌	i 🖓 🖄 🤮		More Listings
luator	New Lead		\$0	0	0	2/7/11	-	Lead 💌	ia 🛱 😫		More Leads
	Gary Keller		\$0	0	0	2/7/11	-	Lead 💌	i 🖓 🖄 🤮	-	Learn More
								😑 Disp	lay Fewer 🛛 Display	More	Learn More
	New messages (0)		ntacts that need action						,	/iew all	

9. You'll now notice that the leads you contacted are no longer in your myLeads dashboard, they have been moved to myContacts.



Four Turn!
I. Go to your eEdge website.
2. Register yourself as a seller lead with your personal email address.
3. Access the notification via your email or text.
4. Click on the lead and go through the ICW process.



Lesson 5: myContacts



Your myContacts Dashboard

I. Log into mykw.kw.com and click on **myContacts > View Contacts** on your Control Panel.

my <mark>kw</mark>		НОМЕ	EDUCATION	COACHING	MARKETING	TECHNOLO	GY RESOURCE	ES EVENTS	REPO	
-									Search	
							Welcome Mar	ket LeaderQA10) - Market Center: 2	21 [Log Out]
Market Lead		10	myCon	rolPanel - Ma	rket Center: 2	21 🗸			myBusiness	yOffice
36% [Edit My Profile]			-	myLe	eads New Lead		myMarketing (3) <u>New Listin</u> [show options]	ngs (\$	(4) <u>Messages</u> [show options]	s
Listing and Sale by Month	Cap Info	Jan Volume	-		myCor	ontacts			lge Messages	
Listings Taken	0	0			Add Ne	w Contacts		KWEma	1	
Listings Sold	0	0								
Sales Written	0	0				INALLA			Agent Referral	Sooreh
Sales Closed	0	0		- 1		KVV LA	UNCHES			Search
My Commu				ZEd	ige	LEAD	-TO-CL OLUTION &	N Fea	tured Vendors	

2. When you open your myContacts dashboard you will have instant access to new leads, new messages and current reminders.

Dashboard My Inbox	M Dashb	oard								
Messages Webmail (2) Rem	New Leads (4) Contacts that are	still in the "lead" ca	ategory and need a	iction.					View	all
Contacts	Contact	Looking In	Avg Price	View	Save	Created -	Activity	Status	Actions	
Manage Listings	John Harralson		\$0	0	0	2/4/11	2/4/11 3:03 PM	Lead 💌	i i i i i i i i i i i i i i i i i i i	^
Search MLS	TJ Swing		\$0	0	0	2/4/11	-	Lead 💌	🛶 😫	Ε
myMarketing	Samantha		\$0	0	0	2/4/11	-	Lead 👻	S 6	
Admin Website Email	Sellerprospect								-	-
Site Activity								😑 Display Fewer	Display More	e
Performance										
Evaluator	New messages (These are emails	(0) you have received	from contacts that	need action.					View	all
	Contact	Message					1	Date 🗸 🔹 Act	ions	
	No records returne	ed.								
Done								• • •	• • •	



opcoming Kemmuers	s (4) Add a new reminder			View all
Contact	Reminder	Due Date 🔺	Туре	Actions
Steve Marshall	Call Steve about staging consultation.	2/4/11 10:00 PM	User	D 📀 😒
Steve Marshall	Call Steve	2/5/11 8:01 AM	User	2 🥝 😧
Steve Marshall	This is a reminder to contact Steve Marshall	2/5/11 8:02 AM	User]} 🥝 😮
<u>Brenda Marshall</u>	This is a reminder to contact Brenda Marshall	2/5/11 8:05 AM	User	🕞 🥝 😣
			😑 Displ	lay Fewer 😗 Display More

Importing Contacts

Before you get started, take time to clean up your current database before doing a bulk import into eEdge so you have the cleanest, most effective book of business possible. Continue using any existing CRM software and become familiar with the eEdge system before doing a bulk import (new leads will be funneling into the system to help them get started and familiar with the system).

Important Note! Through our user group, we identified great enhancements to the import process that will capture even more of the contact-specific information you may have today. This enhanced capability will be available in the coming weeks.

You can import up to 500 contacts a day. We recommend uploading them in groups as you get started in eEdge. This will allow for a smooth transition into the system. In April, the process below will be replaced with an Easy Wizard which will allow you to simply and quickly import your contacts into the system.

If you encounter issues in uploading your contacts, contact eEdge support.

To import your contacts:

- 1. Export your contacts from your existing contact management system into a *.csv file. The process for doing so will vary depending on the current system you are using. Refer to your current system's documentation for the how-to.
- 2. Open your *.csv file in excel. Clean up the file to ensure the data is in the exact order shown below and there is not any extraneous information. From left to right, include a column for First Name, Last Name, Home Phone, Work Phone, Cell Phone, Address I, City I, State I, Zip I, Address 2, City 2, State 2, Zip 2, Address 3, State 3, Zip 3, Email Address 1, Email Address 2, Email Address 3, Password. Be sure you have all columns in your spreadsheet, even if you do not have data in them. In order to import a contact you MUST have a first name, last name, and email address.



1	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	Password'
2	Alexis	MacIntyre	9834558987			8878 Cuernava	Austin	ТХ	75081									alexisandtim@	gmail.com		
3	Tim	MacIntyre	9897876545			786 Bee Cave	Austin	ТХ	78746									mactim@yahoo	.com		
4	Susan	Rider	8787878789															susanrider7924	375@hotmail.com	n	
5	Jim	Halph	9898989898			19 Circle Way	Bee Cave	TX	87879									ralph283098423	8@gmail.com		
6	Grady	Gentride	8898983475			101 Lala Lane	Dallas	ТХ	75081									lalalalala27349	273@gmail.com		
7																					
0																					

- 3. Be sure to delete the header row. Then, save the file as a *.csv file.
- 4. Click on Import/Export in the myContacts dashboard.

board nbox sages omail (🏷) ninders	Contacts					Sel	ler's Market Report	Add a Contact		elp and Support act Advanced Import/Export
acts age Listings	Remember Please char	to change your con nge the status for co	ntact's status fro ontacts that you h	m Lead. have called or	emailed from Le	ad. Using the right	t status will make it e	easier to keep trac	k of your contacts.	
ch MLS									le Rece	nt Activity 🔊 RSS
te Marketing in bsite	Contacts (26)	Status: All			Groups: Select o	ptions	¢			
il Activity	Contact	Looking In 🔺	Avg Price	View	Save	Created	Activity	Time Frame	Status	Actions
ormance Jator	Samantha Sellerprospect		\$0	0	0	2/4/11		1-3 Months	Lead 💌	₩ ₫ ♀
	Samantha Sellerprospect		\$0	0	0	2/4/11	-	1-3 Months	Lead 💌	i 🛱 🤮
	Brenda Marshall		\$0	0	0	2/4/11	2/4/11	Now	Retry 💌	i 🖓 😭 🚱
	Steve Marshall		\$0	0	0	2/4/11	2/4/11	Now	Retry	ia 😫 😫
	TJ Swing		\$0	0	0	2/4/11	-	Now	Lead 💌	🖂 🖆 🔕
	IJ Swing		40		-				CCCC I	

- 5. If desired, assign a group to imported contacts. If you have not yet set up contact groups, or don't wish to assign the entire list of contacts you are importing into the same group, you will be able to easily assign groups at a later time.
- 6. Change the status from "Lead" to "Inactive". (This is very important so that all the imported contacts don't end up on the "myLeads" dashboard.)
- 7. If you'd like to send a welcome email to the contacts, check the box and compose your message. However, we recommend if you're uploading more than 100 contacts at a time, you do not send a message, or you could be marked as spam!
- 8. Choose your *.csv file and click Import.



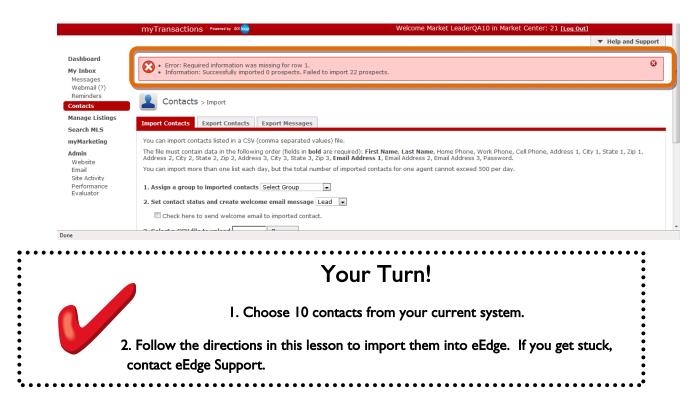
Webmail (?) Reminders	Import Contacts Export Contacts Export Messages	^
Contacts	You can import contacts listed in a CSV (comma separated values) file.	
Manage Listings	The file must contain data in the following order (fields in bold are required): First Name, Last Name, Home Phone, Work Phone, Cell 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.	
Search MLS	Address 2, City 2, State 2, Zity 2, Address 5, City 5, State 2, Zity 5, Endir Address 1, Endir Address 2, Endir Address 5, Password. You can import more than one list each day, but the total number of imported ontracts for one agent cannot exceed 500 per day.	
myMarketing	red can import more than one has called as y but the total humber of imported contacts for one again cannot exect bod per day.	
Admin	1. Assign a group to imported contacts Select Group	
Website Email	2. Set contact status and create welcome email message Lead 💌	
Site Activity Performance	Check here to send welcome email to imported contact.	
Evaluator	♡ •	
	Thanks for chatting with me today. I have signed you up on my Web site and now you have access to all homes for sale in our MLS, just like I do.	E
	Revert to default text	
	3. Select a CSV file to upload Browse.	
	Import	-

9. If the import goes successfully, you will see the following message.

	HOME EDUCATION COACHING MARKETING TECHNOLOGY RESOURCES EVENTS REPORTS HELP	^
	myTransactions Powerstay dot was Welcome Market LeaderQA10 in Market Center: 21 [Log Out]	I
	▼ Help and Support	1
Dashboard My Inbox Messages	Information: Successfully imported 5 prospects. Failed to import 0 prospects.	
Webmail (?) Reminders Contacts	Contacts > Import	
Manage Listings	Import Contacts Export Contacts Export Messages	
Search MLS myMarketing Admin Website Email Site Activity Performance Evaluator	You can import contacts listed in a CSV (comma separated values) file. 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. You can import more than one list each day, but the total number of imported contacts for one agent cannot exceed 500 per day. 1. Assign a group to imported contacts <u>Select Group</u> 2. Set contact status and create welcome email message <u>Lead</u> Check here to send welcome email to imported contact. 3. Select a CSV file to upload	
Done	3. Setec a CSV me to uprodu 1 Blomse	

- 10. If any contacts are not properly imported, you will receive an error message. The most common issues are:
 - a) *.csv file does not include all the required information (review Step 2)
 - b) the information is not in proper order in the *.csv file
 - c) the header row has not been deleted in the *.csv file





Adding Contacts

1. From the myContacts dashboard, click **Add Contact**. Fill out the contact's information. As with importing, any contacts, a First Name, Last Name and Email Address is required.

There are several status categories you can choose from. We recommend the following:

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) 

		L Contacts	>Add a Contact								
Dashboard My Inbox Messages Webmail (?)	Contacts	Status: Name:* Home Phone:	Lead			<u>Sel</u>	ller's Market R port	Add a Contact	Find Cont	Import/E	nced Export
Reminders Contacts Manage Listings Search MLS myMarketing	Contacts (13) Contact	Cell Phone: Work Phone: Email 1:* Email 2:				ns Created -	¢ Activity	Time Frame	E Rece Status	Actions	S RSS
Admin Website Email Site Activity	Grady Gentride Jim Halph Susan Rider	Email 3: eSignature Email:*				2/4/11 2/4/11 2/4/11	-	Just Looking Just Looking Just Looking	Active Active		E
Performance Evaluator	<u>Tim Macintyre</u>	Address Title: City: Zip:		Address: State:	Select One 🔻	2/4/11	-	Just Looking Just Looking	Active Active		
Done	Alexis Macintyre	Timeframe:	Now			2/4/11	-	Just Looking	Active 💌	¥ 9	Ţ
		Has Agent? Has Requested Pre-approval? Selling Home? Welcome Email Me "" Thanks for chatten of have access to all ho	No No No Ssage: why me today. I have a measter sale in our ML	ilgned you up S. tugt like I n	on m y Web site and						
	•••••	• • • • • • • •	••••	Y	′our ⊺	 Furn	!	• • • • • • •		••••	•••
			Cre	ate th	ree cont	act rec	ords.				



Filtering & Sorting Your Database

Once you have imported or added your contacts, you may view them in your myContacts database.

1. To filter by Status or Group, click the drop-down and choose the category you want to sort by. myContacts includes several status types: Lead, Retry, Active, Inactive, Hot, Sold, Trash.

shboard Inbox	C ontacts								Find Con	tact <u>Advanced</u>
essages /ebmail (?) eminders						Selle	e <mark>r's Market Report</mark>	Add a Contact	Manage Groups	5 Import/Exponent
ntacts nage Listings	Conta	Status: All	-		Groups: Select of	options	\$			
arch MLS Marketing	Contact	Looking In	Avg Price	View	Save	Created 🔻	Activity	Time Frame	Status	Actions
nin	Grady Gentride		\$0	0	0	2/4/11	-	Just Looking	Active 💌	Q
ebsite nail :e Activity	Dim Halph		\$0	0	0	2/4/11	-	Just Looking	Active 💌	i i i i i i i i i i i i i i i i i i i
rformance aluator	Susan Rider		\$0	0	0	2/4/11	-	Just Looking	Active 💌	₩
	Tim Macintyre		\$0	0	0	2/4/11	-	Just Looking	Active 💌	₩
	Alexis Macintyre		\$0	0	0	2/4/11	-	Just Looking	Active 💌	🙀 😫
	Alexis Macintyre		\$0	0	0	2/4/11	-	Just Looking	Active 💌	Q
	Add Groups	emove Groups 🗙	¢0	0	0	2/4/11		Just Leekine	Display Fewer	Display More

2. You may also sort by any of the columns by clicking on that column header.

iboard nbox isages bmail (?)	C ontacts				Selle	er's Market Report	Add a Contact	Find Cont	
ninders acts age Listings	Contacts (13) Status: All			Groups: Select of	ptions	\$		🕒 Rec	ent Activity 🔊 R
th MLS Irketing	Contact Looking In	Avg Price	View	Save	Created -	Activity	Time Frame	Status	Actions
te tivity	in Halph	\$0	0	0	2/4/11	-	Just Looking	Active 💌	Q
nance tor	Susan Rider	\$0	0	0	2/4/11	-	Just Looking	Active 💌	i i i i i i i i i i i i i i i i i i i
	Tim Macintyre	\$0	0	0	2/4/11	-	Just Looking	Active 💌	i i i i i i i i i i i i i i i i i i i
	Alexis Macintyre	\$0	0	0	2/4/11	-	Just Looking	Active 💌	i i i i i i i i i i i i i i i i i i i
	Alexis Macintyre	\$0	0	0	2/4/11		Just Looking	Active 💌	i i i i i i i i i i i i i i i i i i i
	Add Groups Remove Groups	*0	0	0	2/4/11		lust Looking	Display Fewer	 Display More

Done



•	Your Turn!) • • • • • • • • • • • • • •
	I. Filter your contact records by Status.	•
	2. Sort contacts by Date Created.	•
		•
••••••		

Viewing Contact Records

I. To view a contact's information and history, click on their name in the dashboard.

ashboard y Inbox		Contacts								Find Conta	ct <u>Advanced</u>	
Messages Nebmail (?) Reminders			Seller's Market Report Add a Contact Manage Groups									
ontacts anage Listings	Co	ntacts (13)	Status: All	×		Groups: Select o	ptions	٥		0		
earch MLS yMarketing		Contact	Looking In	Avg Price	View	Save	Created -	Activity	Time Frame	Status	Actions	
vebsite		John Harralson		\$0	0	0	2/4/11	2/4/11 3:03 PM	Now	Lead 💌	i i i i i i i i i i i i i i i i i i i	
Email		TJ Swing		\$0	0	0	2/4/11	-	Now	Lead 💌	🗳 😫	
Site Activity Performance Evaluator		Steve Marshall		\$0	0	0	2/4/11	2/4/11 7:48 AM	Now	Retry 💌	Sa 🖓	
		Brenda Marshall \$		\$0	0	0	2/4/11	2/4/11 7:45 AM	Now	Retry 💌	😂 😂	
		Samantha Sellerprospect		\$0	0	0	2/4/11	-	1-3 Months	Lead 💌	ig 😫	
		Samantha Sellerprospect		\$0	0	0	2/4/11		1-3 Months	Lead 💌	S (



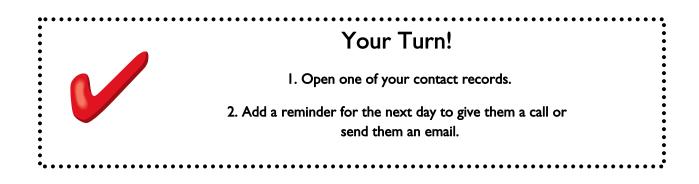
2. Their contact record will show all the key information you need to take appropriate action. It will also list any comments, emails, reminders, and groups associated with their contact record.

lame: ; lome Phone: 	Steve Marshall	Saved (0), Viewed (6	1) History	G Start myTransaction
lome Phone: 512-5555 mail 1: Signature mail: iddress:	12120 steve.marshall@g	mail.com (Primary)		myTransaction
mail 1: Signature mail: ddress:	steve.marshall@g	mail.com (Primary)		myTransaction
mail 1: Signature mail: address:	steve.marshall@g	mail.com (Primary)		
Signature mail: ddress:		mail.com (Primary)		Go to Campaigns
Signature mail: ddress:				Send Email
mail: Iddress:	steve.marshall@g	and the second		Transfer .
		mas.com		Print
				Export V-Card
catusi	-			Email
	Retry .			Stop System Emails
imeframe:	Now	Moving From:		
reated:	2/4/11 9:46 AM	Looking In:		Current Reminders
ource		Has Agent? No		
earch Engine C	opimization	Has Requested Yes		2/5/11 12:00 AM Call Steve about stagin
		Pre-approval?		consultation.
	2/4/11 9:48 AM	Has Hortgage No		Source: User 📄 🧐 😧
ligible for	Yes	Lender?		2/5/11 10:01 AM
	Yes	Selling Home? Yes		Call Steve
ystem	res	Listing Off		Source: User 📝 🧐 🤤
mails?	-	Addresses?		
ting presentat		uas or email this con	cact to offer your services as a	a selling agent and to schedule a
IIA w				
CHLICKE CALL				
Comments				
Emails				
All Reminders				

3. Set a reminder to take action by choosing Add a Reminder,

keting	Name: Steve Marshall	
ite	Home Phone: 512-555-1212 Add a Reminder	Start myTransaction
ctivity	Email 1: brenda.marshall01@gm Due Date:* 2/4/11	Go to Campaigns
1	eSignature brenda.marshall01@gm Time: 8 00v PMv Email: Contact: Steve Marshall	Send Email
	Address: Reminder:*	🖾 Export V-Card
	Status: Retry Call Steve about staging consultation.	Email
	Timeframe: Now Mo	🔀 Stop System Emails
	Created: 2/4/11 7:46 AM Ld	Current Reminders
	Source: Ha * - These fields are required.	
	Search Engine Optimization Ha Save Cancel	2/5/11 8:01 AM Call Steve
	Pr Cancer Last Action: 2/4/11 7:48 AM Ha	Source: User]} 🤡 😵
	Eligible for Yes Le Alerts?	2/5/11 8:02 AM This is a reminder to
	Se Eligible for Yes	contact Steve Marshall
	System Emails? Listing Off Addresses?	Source: User 📑 🔗 😣





Sending Seller's Reports

From your myContacts dashboard you have easy access to send a Seller's Market Report to highlight the services you provide as an agent and help a contact who wants to sell a house understand what the house might be worth in the current market.

I. Click on Seller's Market Report.

Dashboard My Inbox Messages Webmail (?) Reminders	Contacts				Seller	's Market Repo	Add a Co		Find Contact e Groups I	Advance
Contacts Manage Listings	Contacts (4)	Status: All	•		Groups: Select	t options	\$			
Search MLS myMarketing	Contact	Looking In	Avg Price	View	Save	Created 🗸	Activity	Time Frame	Status	Actions
Admin Website	O Steve Marshall		\$0	0	0	2/4/11	2/4/11 7:48 AM	Now	Retry -	🖾 🚱
Email Site Activity	O Brenda Marshall		\$0	0	0	2/4/11	2/4/11 7:45 AM	Now	Retry -	S - S
Performance Evaluator	O <u>Samantha</u> <u>Sellerprospect</u>		\$0	0	0	2/4/11	-	1-3 Months	Lead 💌	₽
	Samantha Sellerprospect		\$0	0	0	2/4/11	-	1-3 Months	Lead 💌	S (

2. Enter the required information and choose to either print or email.



			- 11-1	a and Common
Dashboard	Send a Seller's Report		▼ Hel	p and Suppor
My Inbox Messages Webmail (?) Reminders	A seller's market report highlights the services you provid who wants to sell a house understand what the house n market. Enter the listing information, and the system will similar. You can choose up to three listings to include in t	night be worth in the current show current listings that are	Find Contac nage Groups Recen	ct <u>Advance</u> <u>Import/Exp</u> at Activity
Contacts Manage Listings	Enter Property Information			
Search MLS	Name:* Enter a First or Last Name			
myMarketing	Listing Type: All Types		Status	Actions
Admin Website	Area:* Enter city, neighborhood or zip		Retry -	- 斗 😫
Email Site Activity	Number of Beds:*		Retry -	- 🗳 😫
Performance Evaluator	Number of Baths:*	th	hs Lead 🗸	- 🗳 😂
	Estimated Price:*	th	hs Lead 🗣	- 🗳 😫
	● Print O Email			
	Cancel			

3. Choose up to three comparable listings from the list returned.

Se	elect		to include with repor imilar to the home the cont		o sell			
	~	MLS #	Location	ZIP Code	Price	Beds	Baths	Sq Ft 🔻
	~	5472617	11116 Alison Parke Austin, TX	78750	\$299,000	4	4	3,218
	•	S 3096694	9407 Ashton Austin, TX	78750	\$299,990	3	3	2,400
		4750316	6516 Cascada Austin, TX	78750	\$299,900	3	3	2,069
	Y	2251045	7322 Cave Austin, TX	78750	\$275,000	3	3	1,900
<	: Back					Con	tinue	Cancel



4. The report that is created includes a message from you and information on the comparable properties.



Your Turn!

- Create a Seller's Report for yourself and email it. (You should have registered yourself as a lead in your eEdge website in Lesson 4, if not, do so now).
 - 2. Check your email and see how it looks!



Creating Groups

Groups allow you to target campaigns to a specific subset of individuals with a shared interest or common outcome. For example, you may have a group of individuals who all live in one neighborhood, or who are all real estate investors. Creating groups makes it easy to use myMarketing to set up automated campaigns!

I. Click Manage Groups.

	nyTransactions 🖻	wared by dot boo				Welcome Market	LeaderQA10 in	Market Center :	21 [Log_Out]	
ard									▼ He	lp and Support
ox	Contacts								end Conta	Advanced
iges iail (0) ders						Seller's I	<u>Aarket Report</u>	Add a Cont ct	Manage Groups	I) port/Expo
ts 👘		ber to change your								
e Listings	Please d	hange the status for	contacts that y	ou have calle	d or emailed fr	om Lead. Using the	e right status wil	l make it easier to	keep track of you	ir contacts.
									le Recer	nt Activity 题 R
nrch MLS Marketing nin ebste			Groups: Select options							
	Contacts (13)	Status: All								
te	Contacts (13)	Status: All			Groups:					
tivity	Contacts (13) Contact	Status: All	Avg Price	View	Save	Created 🔺	Activity	Time Frame	Status	Actions
								Time Frame Just Looking	Status Lead 💌	Actions
vity ance	Contact		Avg Price	View	Save	Created .				
nce	Contact		Avg Price	View 0	Save 0	Created •		Just Looking	Lead 💌	₽₫0
ivity	Contact Contact Costanter Susan Cook		Avg Price \$0 \$0	View 0 0	Save 0	Created > 1/26/11 1/26/11		Just Looking Just Looking	Lead 💌	◎ # Q ◎ # Q

2. Create a group for the campaign you are setting up. Now you have a group for your campaign, but no contacts are in the group.

	HOME EDUCATION COACHING MARKETING	Search myKW
m	yTransactions Powered by dot	Welcome Market LeaderQA10 In Market Center :21 [Log Out]
Dashboard My Inbox	Contacts > Manage Groups	Help and Support Find Contact Advanced
Messages Webmail (0) Reminders Contacts	Create New Groups: 12 Direct Campaign 2011	Seller's Market Report Add.a Contact Manage Groups Import/Export
Manage Listings Search MLS	Group нал	# Contacts Actions
myMarketing Admin Webste Email Site Activity Performance Evaluator	Nu records returned.	



3. Click **Contacts** from the left navigation and from your contact list, select the contacts you want to add to the group.

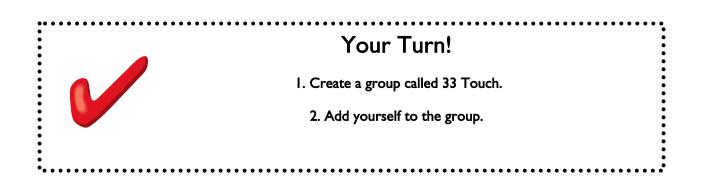
	-1	OME EDUCATION	COACHING	MARKETING	_	GY RESOURCES	EVENTS	Search myKW		
m	nyTransactions	ered by dot 🚃			١	Velcome Market	LeaderQA10 in	Market Center ::	21 [Log Out]	
Dashboard 4y Inbox Messages Webmail (0) Reminders	2 Contacts					<u>Seller's I</u>	Aarket Report	Add a Contact !	▼ He Find Conta Manage Groups	elp and Support Advanced Import/Expo
ontacts lanage Listings earch MLS		er to change your of ange the status for			d or emailed fr	om Lead. Using the	e right status will	make it easier to		ur contacts.
nyMarketing									(E) Recei	nt Activity 🔟 RS
Admin Webste Email	Contacts (13)	Status: All	×		Groups: Select		¢			
	Contact	Looking In	Avg Price	View	Save	Created 🔺	Activity	Time Frame	Status	Actions
Site Activity Performance Evaluator										
Performance	Joelle Senter		\$0	0	0	1/26/11	-	Just Looking	Lead 💌	i 🖓 😭 🤤
Performance			\$0 \$0	0	0	1/26/11	•	Just Looking Just Looking	Lead 💌	i
Performance	✓ <u>Joelle Senter</u>						•	-		
Performance	Image: Source of the sector Image: Susan Cook		\$0	0	0	1/26/11	•	Just Looking	Lead 💌	i 🖓 🗊 🚱
Performance	Joelle Senter Susan Cook Image: Susan Cook Image: Susan Cook Image: Susan Cook Image: Susan Cook		\$0 \$0	0	0	1/26/11	-	Just Looking Just Looking	Lead 💌	⊊ ∰ Q ⊊ ∰ Q

4. Click the Add Groups button and select the group you want.

n	nyTransactions Power	red by dot 🚃			1	Velcome Market	LeaderQA10 in	Market Center :2	1 [Log Out]		
ashboard y Inbox Messages Webmail (0) Reminders	C ontacts	Contacts Contacts Contacts Contact Con									
ontacts anage Listings earch MLS		r to change your of inge the status for			d or emailed fr	om Lead. Using the	e right status wil	make it easier to k		ur contacts. nt Activity 🛽	
yMarketing Imin Vebsite imail	Contacts (13)	Groups: Selec									
ite Activity Performance	Contact	Looking In	\$0	View 0	Save 0	Created	Activity	Time Frame	Status Lead 💌	Actions	
valuator				0	0	1/26/11	-	Just Looking	Lead 💌	i 🖓 🛣 🔇	
valuator		Campaign 2011									
valuator	Image: 12 Direct 0 Image: 12 Direct 0 Image: 12 Direct 0 Image: 13 Direct 0	Campaign 2011		0	0	1/26/11	-	Just Looking	Lead 💌	i 🖓 🗱 🗳	
valuator	Jas	Campaign 2011		0	0	1/26/11	•	Just Looking Just Looking	Lead 💌	부 관 Q 무 관 Q 도 관 Q	

Now you will be able to easily filter your database by group. You can also now easily set the group up on a campaign using myMarketing (see myMarketing section of this guide).





Adding or Removing a Contact from a Group

1. Check the box next to the person you wish to add or remove and click on either Add Groups or Remove Groups. Select the group.

1essages Vebmail (1) Reminders						5	<u>Seller's Market Report</u>	Add a Contact	Manage Groups	Import/Expo				
ntacts inage Listings	Remember to Please chang	Remember to change your contact's status from Lead. Please change the status for contacts that you have called or emailed from Lead. Using the right status will make it easier to keep track of your contacts.												
arch MLS ate Marketing						🕒 Recent Acti								
min ebsite	Contacts (8)	Status: Active	•		Groups: Select o	ptions	¢							
nail te Activity	Contact	Looking In	Avg Price 🔺	View	Save	Created	Activity	Time Frame	Status	Actions				
erformance valuator	Alexis Macintyre		\$0	0	0	2/4/11		Just Looking	Active	🛶 🗊 😫				
	Tim Macintyre		\$0	0	0	2/4/11	-	Just Looking	Active 💌	ia 😫 😫				
	Susan Rider	Email List	\$0	0	0	2/4/11	-	Just Looking	Active	i 🖓 😭 🤐				
	33 Touch Ca	ll List	\$0 ≡	0	0	2/4/11	-	Just Looking	Active 💌	ig 😫 😫				
	Gra First Time Ho	-	\$0	0	0	2/4/11	-	Just Looking	Active 👻	i 🛱 😫				
	Open House	ge All Groups	÷0	0	0	2/9/11	-	Just Looking	Active 💌	i 🛱 😫				
	Add Groups 🔶 R	emove Groups 🗙							😑 Display Fewer	🔁 Display More				



Lesson 6: myEmail



Introduction

When you activated the eEdge system, you were provided with a new "@kwrealty.com" email address. This email address is integrated into eEdge, so all correspondences sent to this address, or from this address, will be saved and filed with the contact's record. It is recommended that you use your @kwrealty.com address for all lead correspondences so that you can take advantage of this tracking.

Accessing myEmail

I. Click on **myEmail** > **eEdge Messages** on your Control Panel.

myControlPanel - Market Center: 21 -	myBusiness myOffice
myLeads (1) New Lead (1) New Lead (3) New Listings [show options]	myTransactions (4) <u>Messages</u> [show options]
MyContacts View Contacts Add New Contacts MWEmail	e Messages

2. Your eEdge inbox will display any new messages from contacts in your database. Your leads and contacts dashboard will also display critical new messages.

				▼ Help and Suppo
hboard Inbox	😡 Inbox		-	
ssages ebmail (?) minders	Messages (0) Remi	iders		
acts	Messages in your inbox	require action. Check this area regularly to make sure that you are responding to	contacts in a timely manner. After you respond to	Go to Webmail (?)
age Listings	a message, file it so tha	t the inbox contains only those items that still require your attention.		
rch MLS	Not filed 💌			
ate Marketing	Prospect	Message	Date -	Actions
i in Ibsite	Brenda (Seller) Marshall	You have received a new CMA request from Brenda (Seller) Marshall	1/31/11 5:18 PM	i i i i i i i i i i i i i i i i i i i
ail	Arlene Wallace	homes	2/8/11 2:43 PM	iii 📑 🛍
e Activity rformance aluator				

3. If you have received any emails to your @kwrealty.com email address from individuals that are NOT yet contacts in your database, you will see them listed under eEdge Webmail. Emails from your contacts that have attachments will also be found in your eEdge Webmail.



Dashboard	😡 Inbox		▼ Help and Support
Ny Inbox Nessages Webmail (2) Reminders Contacts Manage Listings Search MLS Create Marketing Admin Website Email Site Activity Performance Evaluator	Messages (0) Reminder Messages in your inbox requ a message, file it so that the Not filed • Contact M No records returned.	Emails from someone not in your contacts will be found in webmail. Emails with attachments from your contacts will also be shown in webmail.	ding to contacts in a timely manner. After you respond to Go to Webmall (?) Date A Actions

4. Choose to reply to the email or file it. To keep your inbox tidy, file messages that you reply to via phone.

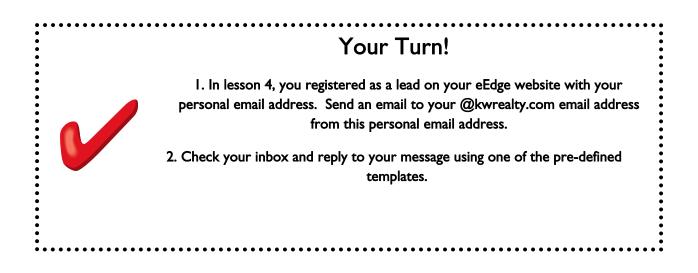
					▼ Help and Support
Dashboard My Inbox	😡 Inbox				
Messages Webmail (?) Reminders	Messages (0) Re	minders			
Contacts	Messages in your inbox req contains only those items t	uire action. Check this area regularly to make sure that you are responding to prosp nat still require your attention.	ects in a timely manner. After you respond to	a message, file it so that t	he inbox Go to Webmail (26)
Manage Listings	Not filed				
Search MLS	Prospect	Message		Date 🔺	Actions
Create Marketing Admin	Brenda (Seller) Marshall	You have received a new CMA request from Brenda (Seller) Marshall		1/31/11 5:18 PM	
Website	Arlene Wallace	homes		2/8/11 2:43 PM	
Email Site Activity					
Performance Evaluator					



5. When replying to messages, you can choose to use one of the five provided templates, if desired.

Brenda (Seller) Marshall	
Reply to Email Message Subject: Re: You have received a new CMA request from Brenda (Seller) Marshall From: Mike Malinowski To: If brenda.marshall+test@gmail.com Hello, Image: Sellect:amassage Image: Sellect:amassage	
The message you're replying to is not filed , would you like to file this message upon sending? ^G yes ^C no	

6. The emails you received and sent are stored in the system with the contact's record.





Lesson 7: myMarketing



Set-up of myMarketing

Before you get started in myMarketing, you'll need to upload your photo and logo so that your myMarketing materials are pre-populated with these images.

I. Click on myMarketing > Market Me in your eEdge Control Panel

		Welco	ome Market LeaderQA10 - Market Center	r: Austin Southwest MC#1 [Log Out	1
	ercentage Complete 5%	myControlPanel - Market Center: myLeads (n/a) New Lead	Austin Southwest MC#1 • myMarketing (n/a) New Listings	myBusiness myTransactions (0) Messages	
Listings Take	Cap Info iales Jan V Units Volume	View	ntacts		
Listings Sold Sales Written Sales Closed	0 0	eEdge	KW AUNCHES YOU LEAD-10-CLOSE SOLUTION	Agent Referral Search Featured Vendors	
My Com Distressed P MC 1 Web C → Quick Li	roperty Community ffice	Headline News	& THE POWER TO PRODUCE	Citi offers support the homebuying process that	

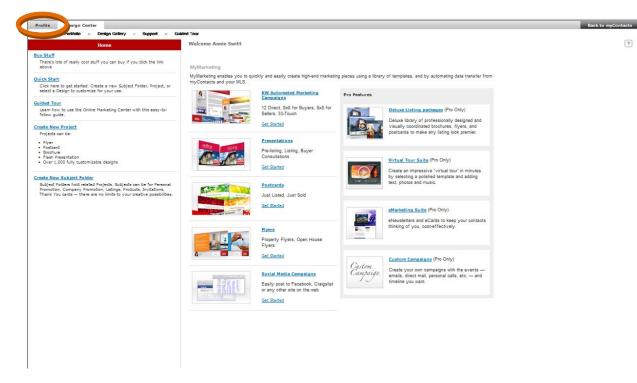
2. Choose Create Marketing.

Messages Webmail (1) Reminders	New Leads (20) Contacts that are s	till in the "lead" catego	ry and need action.						View all	market leader.
Contacts	Contact	Looking In	Avg Price	View	Save	Created .	Activity	Status	Actions	PROFESSIONAL EDITION
Manage Listings	Samantha Sellerprospect		\$0	o	0	2/4/11	-	Lead 💌	a 🕯 😧 🌔	
Create Marketing	Sellerprospect		\$0	0	0	2/4/11		Lead	≅ @ ≡	Get Valuable Enhancements to eEdge
Email Site Activity	TJ Swing		\$0	0	0	2/4/11	-	Lead 💌	🛶 💼 🔕	More Listings
Performance Evaluator	John Harralson		\$0	0	0	2/4/11	2/4/11	Lead 💌	Sa 🗱 🚱	More Leads
	New Lead		\$0	0	0	2/7/11	-	Lead	⊊ <u>€</u>	More Deals
								Displa	ay Fewer 🔹 Display More	Learn More
	New messages (0) These are emails y	ou have received from c	ontacts that need actio	on.					View all	
	Contact	Message						Date -	Actions	
	No records returned	ł.								
									ay Fewer 🚯 Display More	

3. You will be brought to the home page of the Design Center. Choose Profile.



?



4. Click to upload your logo.

Profile Design Center			Back to myContacts
Overview :: Contact Info :: Office Info :: Logo	" Photo " Postal Indicia " Preferences		
Annie Switt	Profile Overview:	?	
Account ID: 22	Contact Information		
Email: annie.switt@kw.com	View the information people use to contact you.		
Company:	Office Information View your office name, address, etc.		
Address:	Logo Upload or change vour company logo.		
Phone:	Photo		
Expires: Never	Upload or change your personal photo. Postal Indicia		
Hosting: 0 KB / 100 MB	Upload or change your postal indicia. Preferences Customize your experience in the Marketing Center.		

5. Upload a logo, or choose one of the provided logos.



Profile Design Center		Back to myContacts
Overview # Contact Info # Office Info # Logo	" Photo " Postal Indicia " Preferences	
Annie Switt	Profile Logo:	?
Account ID: 22	Upload a Logo:	
Email: annie.switt@kw.com		
Company:	OUp	Joad Image Delete
Address:	Cr	rop Image
Phone:	For best results, your Company Logo should be a 150dpi full height ratio of 2:1.	color image with a width-to-
Expires: Never	Neight ratio of 211. We suggest using an image which is at least 200 pixels wide : Instructions: 1. To Upload your image select "Upload Image". A pop	
Hosting: 0 KB / 100 MB	 To Optious your image select optious image. A pop- "Browse." In the dialog box that appears, select your file and c Tip - In Windows XP if you can't remember the name drop down list with the black arrow next to it. You wi 3. Select "Send File". Wait for the image to show in the 	click "Open". e, select "Thumbnails" from the mil be able to see all the photos.
	Choose from one of the provided Logos:	
	Cancel	Save

6. Follow the same steps to upload your photo.



Campaigns & Presentations Available

The eEdge myMarketing module includes several campaigns to market your business and your listings. These pieces are aligned with the proven models of success found in the *Millionaire Real Estate Agent*. The campaigns are beautifully and professionally designed to increase your mindshare and conversion rates. Below you will see the current campaigns and presentations available in the eEdge system. Canadian versions of these will also launch in the eEdge system. More will be rolling out over the coming months, so stay tuned! You can also continue to access all current marketing materials in the marketing library.

1. 8x8 s

An 8x8 is eight touches over eight weeks and is designed to activate a relationship. myMarketing includes two 8x8 campaigns, one for buyer leads and one for seller leads.



2. 33 Touch

Follow your 8x8 campaign with a 33 Touch. Target the people who know you, have or will do business with you in the future or will send you referrals.





3. 12 Direct

The 12 Direct campaign includes 12 monthly postcards designed for marketing to people in your database.





4. Pre-Listing Packet & Listing Presentation

A professionally designed Pre-Listing Packet and Listing Presentation guide are now at your fingertips!



5. Buyer Consultation

A professionally designed Buyer Consultation guide is available as well.





Customizing a Campaign

The campaigns available in myMarketing are completely customizable. To customize a campaign:

I. Click on **myMarketing > Market Me** in your eEdge Control Panel



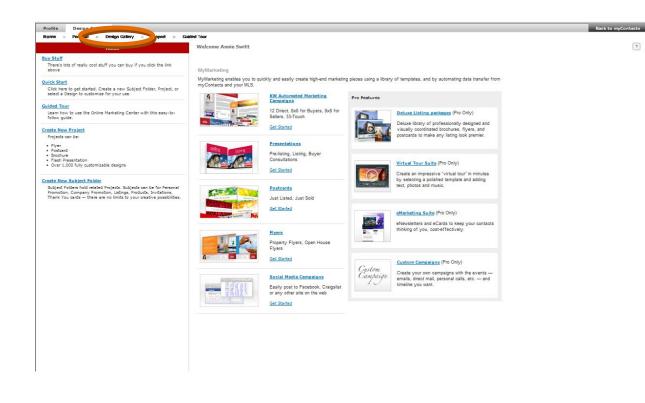
2. Choose Create Marketing.

Dashboard My Inbox Messages	MA Dashboa	ard								
Webmail (1) Reminders		ill in the "lead" catego							View all	market leader.
Contacts	Contact	Looking In	Avg Price	View	Save	Created 🔺	Activity	Status	Actions	
Manage Listings	Samantha Sellerprospect		\$O	0	0	2/4/11		Lead	₩ 🖄 🙆 🕺	
Create Marketing	Sellerprospect		\$0	0	0	2/4/11	-	Lead	🛶 📩 🙆 🗮	Get Valuable Enhancements to eEdge
Email Site Activity	TJ Swing		\$0	0	0	2/4/11		Lead 👻	🛶 🟥 🔕	More Listings
Performance Evaluator	John Harralson		\$0	0	0	2/4/11	2/4/11	Lead 💌	a 🛱 😫	More Leads
	New Lead		\$0	0	0	2/7/11	-	Lead 💌	¥Ø9	More Deals
								😑 Displ	ay Fewer 🚯 Display More	Learn More
	New messages (0) These are emails yo	u have received from c	ontacts that need actio	n.					View all	
	Contact	Message						Date 👻	Actions	
	No records returned									
								🖨 Displ	ay Fewer 🚯 Display More	

3. You will be brought to the home page of the Design Center. Choose Design Gallery.



?







4. In the left-hand navigation, click on the campaign you want to customize. Here you can review the touches included in the campaign. Click **Select** to choose the campaign.

Profile Design Center				Back to myContacts
Home :: Portfolio :: Design Gallery ::	Support :: Guided Tour			-
Design Gallery	8x8Buyer2011			
 eEdge USA (10) Market My Listings (2) Market My Business Market My Business S x8 Campaign for 2011 	Campaign Type: Time Based Events by Type Email: 7 Notification: 1		Total Events: 8	Select
Buyer Consultation Marketing to My Sphere 33 Touch for 2011	V Events	Event Name:		
 I 2 Direct Print Campaign for 2011 Harketing Suite Marketing to Sellers 8x8 Sellers Campaign for 2011 Pre-Listing Presentation Listing Presentation 		event Name: eNewsletter #1.1 Design Template: KW_ENEWSLETTER_001 Date to Send: 1 day(s) after contact is added	Event Type: Email Time to Send: 12:00:00 AM PST	
		Event Name: eNewsletter #2 Design Template: KW_ENEWSLETTER_002 Date to Send: 8 day(s) after contact is added	Event Type: Email Time to Send: 12:00:00 AM PST	

5. Give your campaign a name and click Next.

Profile Design Center Home :: Portfolio :: Design Gallery :: Design Gallery	Campaign Name			Back to myContacts
 eEdge USA (10) Market My Listings (2) Market My Business Marketing to Buyers 	Buyer 8 x 8 - Hot Buyers Current: 24		Maximum: 64	Select
Society of the second sec				
		KW_ENEWSLETTER_002 Date to Send: 8 day(s) after contact is added	Email Time to Send: 12:00:00 AM PST	

- 6. You can add either individuals or groups to the campaign.
 - a) Select the individual or group you want to add and click the arrow. Continue until all individuals or groups are added.
 - b) Click Save.



Imprev Online Marketing Center on	QA-INT - Windows Intern	et Explorer provided by Kelle	r Williams Realty	100000000	
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₩ <u></u> +					
x Google			🔹 👰 י 🈭 Bookma	rks 🔹 🌛 Check 🔹 🦥 Translate 🔹 📝 AutoFil	l 🔹 🤌 🔧 🕹 Sign In
🚖 Favorites 🛛 🚖 🥙 Free Hotmai	I 🜔 Suggested Sites 🔻	Ø Web Slice Gallery ▼			
😁 👻 🕖 Imprev Online M 🗴 💋 l	Lettuce			🟠 🕶 🔝 👻 🖃 🖶 🕶 Pa	age ▼ Safety ▼ Tools ▼ 🔃 ▼
Profile Design Center Home :: Portfolio :: Design Ga	llama a Sumaat a	Duilde d' Terre			Back to myContacts
Home :: Portfolio :: Design Ga Design Gallery	Select Contacts and	l Groups			
▼ eEdge USA (10)	Contacts: () Individua	e 🖱 Groups			
Market My Listings (2)		Filter		Included Contacts	Select
 Market My Business Marketing to Buyers 	First Last	Email 🔺	First La		
🕓 8x8 Campaign for 2011	Jane Doc	jancdoc787gmail.	T ITSL		
8x8 Campaign for 2011 -2 Buyer Consultation	Jim Doe Joe Doe	jim.doe237@gmay.com joedoe2395gmail.co			
Marketing to My Sphere) (K)		
Marketing to Sellers			K		
	< Back Next > 1		< Back Next >		
	Back			Save	
	<u> </u>	/ day(s) after	contact is added	12:00:00 AM PS1	
	Name fore runs, while are determined	Event Name: Email #2			
	and of them a field in the second part of the field in the second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second second	Design Templa		Event Type:	
•	the second	KW_ENEWSLE	TTER_002	Email	4
Done			8	Internet Protected Mode: Off	🔩 🕶 🔍 100% 💌

7. From the overview page that appears, you can review each touch in the campaign, edit it if necessary, change the date or time it will go out, view or edit the contacts assigned to it, and view the history of items sent out.



Portfolio	Buyer 8 x 8 - Hot Bu	yers		
New Subject Folder New Project New Campaign	Campaign Type: Time Based Total Events: 8 Total Contacts:		Status: Inactive Upcoming Delivery: N/A Events by Type	Start Edit Campaign
Hosting Overview My Campaigns	6		Email: 7 Notification: 1	
Buyer 8 x 8 - Hot Buyers Design Packages My Projects	Contacts			Add / Remove
	History			
	V Events			Add
	Reserve to be sensed of reserve and an end of the sense o	Event Name: eNewsletter #1.1	Status: (a) On (b) Off	Edit Event
	 1 and Aller a	Design Template: KW_ENEWSLETTER_001	Event Type: Email	Edit Email Options
		Date to Send: 1 day(s) after contact is added	Time to Send: 12:00:00 AM PST	Details
	With the same of the same time of the same	Event Name: eNewsletter #2	Status: On Off	Edit Event
	Bard And Channeller and New Constants for Art New Constants of the Section Arts Art New Constants of the Section Arts	Design Template:	Event Type:	Edit Project
	Tagent State Sta	KW_ENEWSLETTER_002	Email	Edit Email Options
	Entrance in the country of the count	Date to Send:	Time to Send:	

8. To edit an event (the date), click **Edit Event** and make any updates necessary. Note that for the 33-Touch Campaign, the scheduled dates will be set from KWRI – this ensures that we can include timely touches such as *This Month in Real Estate*.

New Project New Campaign	Time Based Total Events: 8		Inactive Upcoming Delivery: N/A Events by Type	Edit Campaign
Hosting Overview My Campaigns The Buyer 8 x 8 - Hot Buyers	Total Contacts:		Events by Type Email: 7.1 Notification: 1	
Design Packages My Projects	Event Name eNewsletter ≠1.1 Current: 16 Number of Days Until Event Fir	res	Maximum: 64	Add / Remove
	1 Time to Send 12:00 AM	✓ All times are Pacific Time		Add Edit Event
				Edit Email Options Details
				Edit Event
	Close		Save	Edit Project Edit Email Options
	Preview	o uay(s) arter contact is auteu	12:00:00 AM PS1	Details
		Event Name: Phone Call	Status: (a) On (c) Off	Edit Event

- 9. To customize a piece:
 - a) Choose Edit Project.



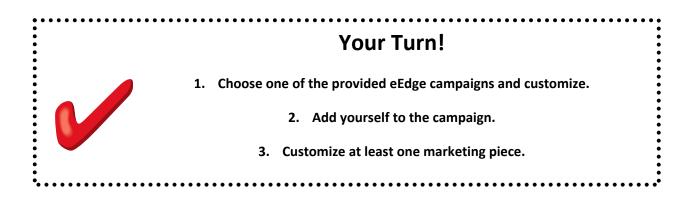
Portfolio	Buyer 8 x 8 - Hot Buyers			
New Subject Folder New Project New Campaign	Campaign Type: Time Based Total Events: 8		Status: Inactive Upcoming Delivery: N/A	Start Edit Campaign
losting Overview	Total Contacts:		Events by Type Email: 7 Notification: 1	
ty Campaigns) Buyer 8 x 8 - Hot Buyers Design Packages ty Projects	Contacts			Add / Remove
	History			
	V Events			Add
	Here and the second sec	nt Name: Newsletter #1.1	Status: (a) On (b) Off	Edit Event
		ign Template: W_ENEWSLETTER_001	Event Type: Email	Edit Email Option
	Dat Dat		Time to Send:	
		e to Send: day(s) after contact is added	12:00:00 AM PST	Details
	Proview Proview Des Des			Details Edit Project

b) eEdge will walk you through all the elements of the project and allow you to make edits to the text or images.

c) As you make changes, click **Preview** regularly to view your updates.

Profile Design Center		Back to myContacts
Home " Portfolio " Design Gallery " Support	" Guided Tour	
Project eNewsletter #2	User Contact Information:	
View Le vat Preview	Note: Maximum character counts are estimates only. Capital letters take more space and therefore reduce the maximum characters available. For more info <u>click hare</u> . Please preview your projects before publishing.	
	Name: ?	
	Brokerage:	
The first sector of the fi	Keller Williams - QA10	
Project Details Design Specs Project Type:	Remaining: 233 Estimated Maximum: 255	
E-Mail/E-Newsletter	Phone 1: ? Phone Type	
External Data Provider:	5124484222x123 Office	
Project Updated:	Email address:	
02-10-2011 06:41 PM PST	mleaderqa10@mltestx.com	
	URL (Web site):	
	mleaderqa10.mltestx.com	
	Secondary Agent Name: ? Name separator: ?	
	8.	
	Back Page 1 of 4 Next	
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Launching a Campaign

I. When you are happy with the campaign, click **Start** to launch.

Portfolio	Buyer 8 x 8 - Hot Buy	/ers		
New Subject Folder New Project New Campaign Hosting Overview My Campaigns	Campaign Type: Time Based Total Events: 8 Total Contacts: 6		Status: Inactive Upcoming Delivery: N/A Events by Type Email: 7 Notification: 1	Start
👘 Buyer 8 x 8 - Hot Buyers Design Packages My Projects	ContactsHistory			Add / Remove
	V Events			Add
	sector and the	Event Name: eNewsletter #1.1 Design Template: KW_ENEWSLETTER_001 Date to Send: 1 day(s) after contact is added	Status: Off Event Type: Email Time to Send: 12:00:00 AM PST	Edit Event Edit Project Edit Email Options Details
		Event Name: eNewsletter #2 Design Template:	Status: (a) On (b) Off Event Type:	Edit Event Edit Project

2. The campaign will now show as Active.



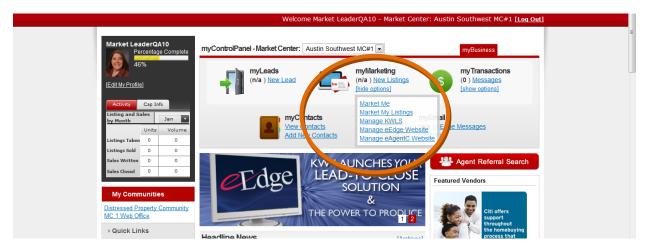
rofile Design Center			Back to myContact
ome :: Portfolio :: Design Gallery	:: Support :: Guided Tour		
Portfolio	Buyer 8 x 8 - Hot Buyers		
New Subject Folder New Project New Campaign	Campaign Type: Time Based Total Events: 8	Status: Active	Pause Edit Campaign
Hosting Overview	Total Contacts:	Events by Type	
My Campaigns	6	Email: 7 Notification: 1	
U Buyer 8 x 8 - Hot Buyers Design Packages	Contacts		Add / Remove
My Projects Lookout Lane (1) Aldona's listing (1)	History		
 8 x 8 Campaign (2) 8 x 8 for Buyer Leads 8 x 8 Campaign 	V Events		Add
 liting flyer (2) 33 touce test 	Event Name: eNewsletter #1.1	Status: On Off	Edit Event
	The second secon	Event Type:	Edit Project
	KW ENEWSLETTER 001	Email	Edit Email Options



Reviewing Campaigns You've Set Up

To review the campaigns you have set up:

1. Click on myMarketing in your eEdge Control Panel and choose Market Me.

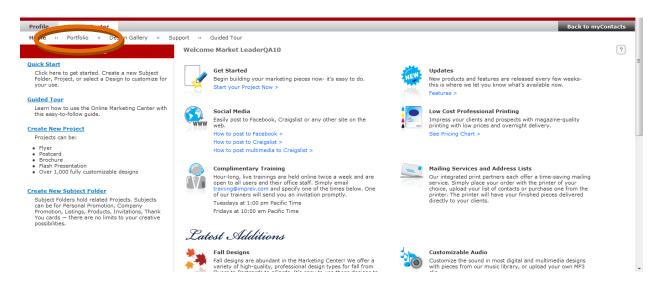


2. Choose Create Marketing.

y Inbox Messages	(Annual of the second s									
Webmail (1) Reminders	New Leads (20) Contacts that are s	till in the "lead" catego	ry and need action.						<u>View all</u>	market leader.
ontacts	Contact	Looking In	Avg Price	View	Save	Created 🔺	Activity	Status	Actions	
anage Listings	Samantha Sellerprospect		\$0	0	0	2/4/11	-	Lead 💌	⊊ ₫ @	1
reate Marketing	smantha Sellerprospect		\$0	0	0	2/4/11		Lead 💌	≅ @ =	Get Valuable Enhancement to eEdge
Email Site Activity	TJ Swing		\$0	0	0	2/4/11		Lead 💌	i 🖓 😰 🔕	- More Listing
Performance Evaluator	John Harralson		\$0	0	0	2/4/11	2/4/11	Lead 💌	i 🖓 🖄 🔕	More Leads
	New Lead		\$0	0	0	2/7/11	-	Lead 💌	⊊ ₫ @	More Deals
								Displa	ay Fewer 🔹 Display More	Learn More
	New messages (0)	ou have received from o	ontacts that need acti	-					<u>View all</u>	
	Contact	Message	untacts that need acti					Date 🗸	Actions	
	No records returned	ł.								
								© Dical	ay Fewer 🚯 Display More	

3. You will be brought to the Design Center. Choose Portfolio.





4. Choose your campaign under **My Campaigns**. From here you can view the current campaigns, contacts assigned, history, and make any edits necessary.

Profile Design Center				Back to myContact
Home :: Portfolio :: Design Galler	/ ··· Support ··· Guided Tour			
Portfolio	Buyer 8 x 8 - Hot Buy	vers		
New Subject Folder New Project New Campaign	Campaign Type: Time Based Total Events: 8		Status: Active Upcoming Delivery: N/A	Pause Edit Campaign
Ho II My Campaigns	Total Contacts: 6		Events by Type Email: 7 Notification: 1	
Buyer 8 x 8 - Hot Buyers	Contacts			Add / Remove
 ✓ My Projects 	History			
∃ 🗁 8 x 8 Campaign (2) a 8 x 8 for Buyer Leads a 8 x 8 Campaign	Vents			Add
Iting flyer (2) 33 touce test	Receive is a series of viscol assessments that an event in the series of the series o	Event Name: eNewsletter #1.1	Status: On Off	Edit Event
		Design Template:	Event Type:	Edit Project
		KW_ENEWSLETTER_001	Email	Edit Email Options
		Date to Send: 1 day(s) after contact is added	Time to Send: 12:00:00 AM PST	Details



Adding or Removing People From a Campaign

- I. Follow the directions above to review a campaign.
- 2. Click Add/Remove.

Profile Design Center			Back to myContacts
Home :: Portfolio :: Design Gallery	:: Support :: Guided Tour		
Portfolio	Buyer 8 x 8 - Hot Buyers		
New Subject Folder New Project New Campaign	Campaign Type: Time Based Total Events: 8	Status: Active Upcoming Delivery: N/A	Pause Edit Campaign
Hosting Overview	Total Contacts:	Events by Type Email: 7 Notification: 1	
🔻 My Campaigns	ō	Email: 7 Notification: 1	
🕓 Buyer 8 x 8 - Hot Buyers	Contacts		Add / Remove
Design Packages	Contacts		Add / Kelliove
My Projects			
E 📴 Lookout Lane (1)	History		
📃 Aldona's listing (1)			
🛛 🚞 8 x 8 Campaign (2)			
8 x 8 for Buyer Leads	V Events		Add
8 x 8 Campaign			
liting flyer (2)	Event Name:	Status:	Edit Event
33 touce test	eNewsletter #1.1	On Off	Edit Project
	KW ENEWSI ETTER 001	Event Type: Email	Edit Email Options
	Date to Send: 1 day(s) after contact is added	Time to Send: 12:00:00 AM PST	Details
	Preview		

3. Click the left arrow to remove groups or individuals.

Profile Design Center Home :: Portfolio :: Design Gallery ::	Select Contacts and Groups		Back to myContacts
Portfolio	Contacts: 💿 Individuals 💿 Groups		
New Subject Folder New Project New Campaign	12/33 Mass Email List 33 Touch Call List	Included Groups	Pause Edit Campaign
 Hosting Overview W Ky Campaigns Surver 8 x 8 - Hot Buyers Design Packages My Projects 	First Time Home Buyer Investor Open House Referral ZimportbyBeth T < Back Next > 1	8 x 8 Campaign Back Next > 1	Add / Remove
 B interpretation B Aldona's listing B × 8 Campaign B × 8 for Buyer Leads B × 8 Campaign 			Date Added 2011-02-10 2011-02-10 2011-02-10 2011-02-10 2011-02-10
8 🛄 liting flyer	Close History	Save	2011-02-10
	V Events		Add

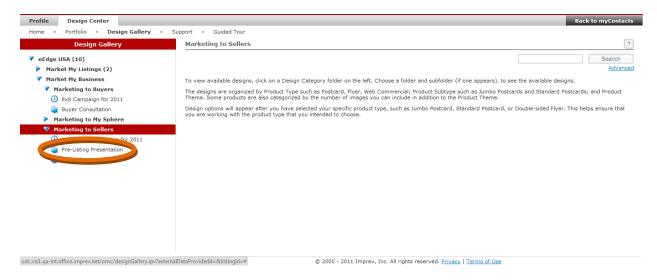
TIPS! If you've assigned a group to a campaign, but there is one individual you want to remove from the campaign, you'll need to remove them from the group. See the myContacts lesson.

If you've assigned a group to a campaign and you add an individual to that group they will be launched on the campaign immediately with the next touch—no further action is required!

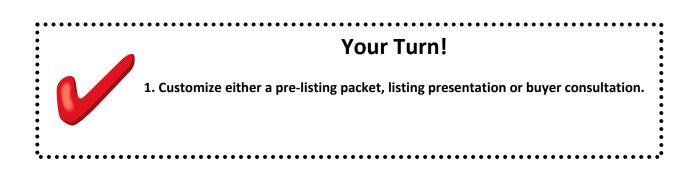


Preparing for a Listing Appointment or Buyer Consultation

1. In the Design Gallery, choose Market my Business > Marketing to Sellers (or Buyers) and select the presentation you wish to edit..



2. Follow the steps to customize your presentation.





Market Your Listings

I. From your Control Panel, click New Listings.



2. From your listings list, click on Create Marketing Material.

shboard Inbox essages (ebmail (1) eminders	All Listings Email to	Contacts Post on Craigslist							
ntacts	Roview your active listi	ngs and the related promotional activities.	Use the Actions of	ump to cond the li	isting to s	optocto			
anage Listings	Neview your active listi	igs and the related promotional activities.	USE THE ACTIONS CO	unin to send the i	isting to th	Jintaces.			
earch MLS	MLS#	Location	Price 🔻	Listing Agent	Beds	Baths	Sq Ft	Emailed Listings	Actions
reate Marketing dmin	<u>4552697</u>	26821 Lookout Ridge Cv Marble Falls, TX 78654	\$2,250,000	KathleenBucher	5	4	3767	No	-
Website Email Site Activity Performance	4709069	3900 Pearce Rd Austin, TX 78730	\$0	KathleenBucher	7	8	12000	No	
	4825548	14506 Mansfield Dam #16 CT Austin, TX 78734	\$0	KathleenBucher	0	0	0	No	.
valuator	4865262	1301 Ridgecrest Dr Austin, TX 78746	\$0	KathleenBucher	4	4	3382	No	B
4875090	4875090	8888 Tallwood Dr Austin, TX 78759	\$0	KathleenBucher	2	2	1196	No	-
	4875150	17202 Jigsaw Pathway Round Rock, TX 78664	\$0	KathleenBucher	4	2	1705	No	
	► 4917875	2805Trailview Mesa CV Austin, TX 78746	\$0	KathleenBucher	7	6	7027	No	
	4946161	4200 Bradwood Rd Austin, TX 78722	\$0	KathleenBucher	3	2	2245	No	
	<u>4966355</u>	3409 Far View Dr Austin TX 78730	\$0	KathleenBucher	4	4	4655	No	a
erga10.mltesty.com/adm	min/alllistings/#designGallery		*0				0075		_

3. Within the Design Gallery, choose the marketing material you wish to create and edit and customize as you desire. The listing information will be pre-populated for you. Please note that due to the way the MLS resizes your images for posting, you may need to re-upload property images to be appropriate for print (the system will notify you if an image is not print-quality).