



Touchpoints Manager Guide

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Summary

This guide is designed to help you get the most out of the ReNet Touchpoints Manager. This is a unique selling tool for you as an agent to be able to list and sell more property. By prospecting with your enquiries, contacts and potential sellers, this guide will show you how to setup some set and forget features to ensure they are receiving constant communication.

These instructions are based on a staff member who has FULL SUPER USER ACCESS. If you have restricted access you may not be able to view all areas.

To set your permissions, you will need to speak to the owner or administrator of your office.



You can also find additional video tutorials by going to the **Watch Video** option in the smart search of your ReNet software.





Enquiries

Once your listing is set live, you will start to automatically receive enquiries from 4 sources:

Your ReNet powered website Our ReNet portals Domain.com.au Realestate.com.au – If you are not automatically receiving realestate.com.au enquiries please follow the steps to set this up.

With all enquiries that are received, you will receive an email directly from the source or from ReNet to advise that a new enquiry has been received. This will automatically log into the system against the property.

Enquiries are not automatically created as contacts to your database. You will need to qualify these enquiries to ensure you are entering quality contacts.

Setting up enquiries from realestate.com.au

Log in as administrator admin and go to **Setup** and then **realestate.com.au enquiries** on the left hand side.

Home Listin	s Contacts	Office Reports	Website RMA Sales	Marketing	Setup Support	
Office		+ Property	+ Contact + Enquiry + C	ofi Attendee 🔵 🕂 In	spection + Offer + Note	+ Appraisal
Touchpoints Manager	м					
Sales Process						
Default Locations			Another Tou	chpoints Manag	ger ™ Feature	
Document templates		Realestat	e.com.au and Domain eng	iries automatio	cally logging as of now, ple	ase watch.
Task Manager					,,	
Fields for Listings						
Contacts Categories						
Quarterly Sales Goals						
My Preferences						
Realestate.com.au Er	quiries					

Each staff member has been assigned their own renet.cloud email address. Log into your agent admin for realestate.com.au and go to the **manage profiles** area.

For you staff member, paste their renet.cloud email address into the **email** and **confirm email** field. Ensure that this is comma separated.

Idii	
address@yourdom	ain.com.au, a+6_1234_5678@renet.cloud
onfirm Email	

Select save.





Once this has been completed for each staff member, enquiries will automatically start populating directly into ReNet.

Logging Enquiries through ReNet



There are three main areas where you can log an enquiry in ReNet: From the main screen of ReNet From a listing From a contact

From any area where you add an enquiry you will see the below form:

(Required) Source	Select Source C + Sources
Contact	First Name Surname
Phones	Phone or Mobile Phone or Mobile eMail Image: Check matching contacts
Address	Address of Enquirer NSW Post Code
Enquiry Property	General or Search Property Market Appraisal Select Sales property to save as property end Current For Sale For Sale
Staff	Staff Member
Enquiry	
Taken by	Varelle Johnson 26-06-201 Status Active O DO NOT Send eBrochure to client
Contacts Manager	Do not insert into Contacts Manager

Source: Where the enquiry has come from.

You are able to manage these by selecting the **+ Sources** button.

Contact: The name of the person enquiring.

If you are entering your enquiry from a contact card, this will not display.

Phones: The enquiry contact details.

When this is entered into the system, we will automatically check your database to see if this person has had previous contact in relation to a property or if they are already a contact in your system.

3	06-06- 2017	Varelle			0403798215 No email NSW 0000	5	Varelle Johnson	Select
	(Required)	Source	Select Source	<mark>0</mark> (+	- Sources			
		Contact	First Name		Sumame			
		Phones	0403 798 215	Phone	or Mobile	eMail	Check matching contacts	





Address: The address of your contact.

Enquiry Property: Use the filter to select the property they are interested in. If you are inserting this directly against a property, this area will not display.

Staff: This area will automatically select to the primary listing agent on your property. You can change this to any staff member by using the drop down. When the enquiry is saved, the staff member in this area will receive an email notification with the enquiry that has been entered.

Enquiry: Enter the enquiry details.

Taken By: This is the staff member who is logging the enquiry.

Contacts Manager: When entering all enquiries, by default these people will not become contacts in your database. As you are entering your enquiries in this area, you have the ability to enter these enquiries as contacts at the same time by using the drop down. You also have the ability to add buyer or renter requirements if you have qualified your contact.

Where Enquiries Show

Once your enquiries have started to be logged, they will show in several areas automatically:

- In your Touchpoints Manager
- Directly against a listing
- Directly in contact chronological history if they are a contact in the database
 - This is based on unique criteria of a phone number or email address that has been supplied for the enquiry.

In your Touchpoint Manager

From the main screen of ReNet select Touchpoints Manager and then the enquiries tab.



When all of your enquiries are logged into the system, regardless of if they have come from a portal, your website or logged into the system, they will log with a status of **active** meaning that they need to be followed up.





Touchpoints Manager ™	Enquiries Inspections OFI Attendees Offers Appraisals My Activities Owner Reports						
Date Range	From 26-06-2016 To 27-06-2017 or Select Date Range 📀						
Filters	Filters Varelle Johnson						
Select Listing	Select Listing Search by Property ID, Price or Address + Property						
Status	Active						
Cross check	Cross check against existing CONTACTS and ENQUIRIES						
	Search						
Displaying results 1 to Previous 1 (1) 15-06-2017 TRISE	<pre> Send SMS Send eBrochure Printable Report isplaying results 1 to 10 of 32</pre>						
	Status Active C Edit X						
Contact							
Enquiry	Enquiry on: [17941825] 27 Aquamarine Drive TOORMINA						
Source	Source advert # 1 - Inserted by: Varelle Johnson						
Notes	Notes Enquiry Notes: No notes added (click notes to add).						
Create Contact	Insert TRISH as a new CONTACT						

By using the **Cross check** option, ReNet will check the database to see if the contact details for your enquiry already exist. This is based on phone numbers and email addresses that have been supplied in the initial enquiry.

If this person is already a contact in the database, a link to the contact will be shown and the enquiry will automatically log in the contact chronological history.

If this person is not yet a contact, there is a button to insert this enquiry as a contact into the database.

Once the enquiry has been handled use the **status** option on the right hand side to mark the enquiry as **completed**. This will remove the enquiry from your prospecting area, but will remain in ReNet as history.





Directly against a property

From a property select the **Touchpoints Manager** tab and then **enquiries.**

Ê	ID:1794182	5 - 27	Aquamarine Drive, TOORMINA			Edit	
	+ Enquiry + Media + OFI Attendee + Inspection + Expense + Offer + Note + Contract + Task						
Ow	ners: 🤽 Luk	ce 2, 1	& Varelle				
	Authority: Exclusive Listing: by Varelle Johnson on May 08 17 Expiry: 05-08-17 Live: 49 Days on market since agreement date & 40 Days on market since live 16-05-2017. Status: SOLD (Conditionally)! <i>No conditions</i> Current © @ f Price: (Search price \$469,000) Modified: Fri 23rd Jun 2017 @ 02:31 pm						
Pro	ofile 28 Touch	points	s Manager™ 8 Notes Prospecting 15 C	Campaign Manager Broch	Owner Reporting 1 Sales Process Tasks		
To	uchpoints Man	ager ™	5 Inspections 9 Open Homes 1 Offer	s <u>13 Enquiries</u>			
	Dates From 08-04-2017 To 21-08-2017 Select Date Range 📀						
	Contacts Name Show contact name as Show Contacts FULL Details						
				Search			
	Send SMS Send eBrochure Printable Report						
En	Enquiries Learn About Enquiries						
#	Date	Enqu	iry From	Source	Enquiry		
1	1 15-06-2017 trish adve			advert # 1	Active	0	

From here you will see:

All enquiries logged for the property.

Have the ability to mark as active/complete to remove from an agents prospecting area.

Bulk communicate to your enquiries.

From a Contact Card

Chronological History Ebrochure history is found under the Prospecting Tab				
23-06-2017	NOTE: Varelle Johnson : testing modified date			
14-06-2017	NOTE: 27 Aquamarine Drive TOORMINA: scott schindler : (Property added note) was all good here			
09-06-2017	ENQUIRY: 27 Aquamarine Drive TOORMINA: Varelle: Please call about price guide (Source: Advert # 1)			

All of the enquiries will show directly in the chronological history for a contact.

Did you know that when your enquiries are added into the system, we will send the enquiry an eBrochure of the property? This will be sent directly to the enquiry email address with all of the property information.

You are also able to manage these alerts directly through the software.





Converting your Enquiries to Contacts

From your Touchpoints Manager, you have the ability to convert your enquiries to a contact in your database.

Create Contact	
ordate contact	
	Tinsert TRISH as a new CONTACT

When you select the option to Insert, this will open a new contact card.

We will copy as much contact information as possible from the initial enquiry. This will include:

Name Contact details Address Source

Assign any relevant categories, by using the tick box options. You are able to assign more than one category.

Categories		
Valegones	Bricky	+ Category Setup
	 Bricky Builder buyer cmhp Coaching 2017 Commercial Developer Developer Developer Development First Home Buyer IA Member Insurance Investor Landlord 	 past sellers Potential Buyer Potential Tenant Potential Vendor Previous Seller realcorp receiver relief managers Renovator Renters scott ebrochure Seller Enquiry Solicitor

To manage your contact categories select + Category Setup.

The staff member to manage the contact will automatically be selected based on the staff member who is logged into the system. You are able to select more than one staff member if required. You are then able to drag and drop in order of preference.

Once this has been saved this will automatically map back the enquiry to the contact card. When searching future enquiries, by using the **Check Contact** option, this will show that this person is now a contact in your database. This will only show provided that the same unique criteria has been provided for future enquiries.





Adding Buyer/Renter Requirements

Once you have qualified your enquiries, you are able to setup automatic alerts based on the property that they are interested in.

From your contact select + Buyer Requirements or + Renter Requirements.

+ Buyer R	+ Buyer Requirements + Renter Requirements				
RENTER Type	Normal RENTER 😜 Wants to act ASAP	Receive renter Match Email Alerts			
Match Prices	from - S to Optional	Bedrooms Match Optional Bedrooms			
Match Types	Bural Ommercial/Industrial No Pets				
Match Locations	Custom location Add Custom Location	+ Default Locations			
		NORTH SHORE			
	🗆 BELLINGEN 🚖				
	BEN LOMOND	SAWTELL			
		SOUTH WEST ROCKS			
		SYDNEY			
	🗌 BONNIE DOON 🌟	TABULAM			

Type: From here you are able to filter your contacts by temperature:

Hot – Buyers or Renters looking for property as soon as possible. This will show with a red contact icon.

Warm – Buyers or Renter looking for properties in the near future. This will show with an orange contact icon.

Normal – Buyers or Renters who are interested to know the properties that are on the market. They may buy or rent at any time. This will show with a blue contact icon.

You can also manually unsubscribe contacts from receiving alerts by unticking **Receive** Match Email Alerts.

Match Prices: This is the price range that the contact is looking for.

For Buyer requirements enter whole figures eg 360000.

For renter requirements enter the price per week eg 250.

This will match to the price required that you have entered for your property.

Match Types: This is the type of property that the contact is interested in.

Match Locations: This is where the contact is interested in purchasing or renting.





Did you know that you are able to setup favourite locations for buyer requirements? If you are an agent that works in a particular area select **+ Default Locations** and set your locations to be a favourite. When assigning the buyer and renter requirements these locations will be automatically selected.

The great thing about our alerts is that you have the ability to keep the criteria broad for people who would like a wide variety of properties. You can also filter these down to very specific requirements if you have people who would only like certain types of properties in certain suburbs.

Advanced Requirements

To set advanced requirements select + Advanced filter options to crossmatch properties.

+ Advanced filter options to crossmatch properties.

Residential Options	Bathrooms (Min) Garages (Min) 🗌 Has Pool	Optional ᅌ
Property Categories	Semi Rural Acreage Semi Rural Beach Front Water Front Investment Development Retirement Block Of	Optional 🗘
Land Size Min/Max	Land Size (Min) Land Size (Max) N/A	Optional 🗘
Building Size Min/Max	Building Size (Min) Building Size (Max) N/A	Optional 🗘
Commercial Category	Bulky Goods General Hotel Industrial Office Space Retail Storage Sheds	Optional O
Business Category	General Accommodation/Tourism Agriculture Automotive B & B Beauty/Health Building Products	Optional ᅌ
Internal Category	Select Listing Internal Category Cold - Does not need to sell Developer Stock Development potential Dual Income Dual occupancy	Optional 🗘

To have the advanced criteria match the listing alerts, the drop down on the right-hand side must be set to **required**.

Through this area you are also able to track and match internal listing categories. This is great if you have a contact looking for apartments in a specific complex or land within a development.

For this to work you must also select the internal listing category through your live listing.





Requirement Comments

Comments	In the second	
	Add notes about the requirements	
		/_

This form is in relation to what a contact is looking to purchase or rent. Any comments that are added into this area, will be sent to the contact when an alert is sent. Do not put any personal notes into this field.

Showing Matching Properties

Once your buyer and renter requirements have been added you will see the matching properties based on the criteria that has been entered.

Spending Range	Minimum Price 0 Maximum Price 609700			
Locations	Z ARMIDALE , BELLINGEN , BEN LOMOND , BOAMBEE , BOAMBEE EAST , BONNIE DOON , BONVILLE , , TOORMINA			
Property Types	✓ Any property type			
Archived Listings	☐ Match against archived listings (not live)			
Pending Listings	C Match against pending listings (has agency agreement but no	t live)		
Pipeline Listings	Match against market appraisal pipeline listings with forcast listing dates			
Results	Results 50 0 matching properties will show			
Find Properties				
	Find Propertie	\$		
There are 1 propertie	Find Propertie es in your database matching the above.	5		
There are 1 propertie	Find Propertie es in your database matching the above.	s Land size: 4000 Square Mtr 🔙 4 🔜 1 📻 1		
There are 1 propertie SOL Our Our	Find Propertie es in your database matching the above. 27 Aquamarine Drive, TOORMINA D (CONDITIONALLY) Brand New Home Brand New Home	s Land size: 4000 Square Mtr 🛏 4 🕰 1 📻 1		
There are 1 propertie SoL Our eBrochure Content	Find Propertie es in your database matching the above. 27 Aquamarine Drive, TOORMINA D (CONDITIONALLY) Brand New Home Brand New Home	s Land size: 4000 Square Mtr 🛁 4 🞑 1 📻 1		

You have the ability to send an eBrochure from this area of the matching properties.

You can also search on the fly for other properties: **Spending Range:** Update the price range to reveal/hide more properties.

Locations: Update the locations to reveal/hide more properties.

Property Types: Filter by property types.





Archived Listings: Search archived listings in the system.

Pending Listings: The ability to search listings with an active agency agreement that are not yet live on the internet.

Pipeline Listings: When entering market appraisals, you have the ability to enter a forcast listing date. This is when you expect the listing to go live. You are then able to search on this to show future listings to come onto the market.

Results: Show the top matching properties.

When your contacts start interacting with your properties, they will automatically start to follow the property. You will see more about this in the tracking area.

If you know of properties that are not going to be a good fit for your contact, you are able to unfollow these listings.



By selecting the option to unfollow the listing, the contact will not receive any automatic alerts for this property.

Automatic Listing Alerts

Once your contact has buyer/renter requirements added, provided they have an email address, they will be automatically subscribed to receive listing alerts from the system. The listing alerts will be triggered as soon as a listing update has been made. These will send for the following updates:

For Sale Alerts

New Listing Price Reduction – Of more than \$5000 This is triggered from the price required field Sold properties The day before an auction

For Rent Alerts

New Listing Price Reduction – Of more than \$5 per week This is triggered from the price required field Leased Properties





Customising Automatic Listing Alerts

Through the setup area you have the ability to customise and manage the alerts that you send to your contact database.

If you are logged in through administrator admin, select **Setup** and then **Touchpoints Manager** on the left hand side.

Home Listings Cor	ntacts Office Reports	Website	RMA Sales	Marketing	Setup	Support	
Office Touchpoints Manager ^{tw} Sales Process Default Locations Document templates Task Manager Fields for Listings Contacts Categories Quarterly Sales Goals	p Contacts One Sates Main Recting Setup Contacts + Property + Contact + Enquiry + Off Attendee + Inspection + Offer + Note + Appraisal Contacts Touchpoints Manager™ Setup General Touchpoints Auto Responders Touchpoints Auto Criteria Criteria Alters Manage General Touchpoints Auto Responders Touchpoints Auto Criteria Criteria Alters Manage Guatom Auto Responders Touchpoints Auto Criteria Criteria Alters Vou can create a custom message to your contacts for email alerts, adjust the bedrooms matching or turn alerts off & on. Note: by default alerts are ON and match contacts with listings based on locations, prices and types (houselcommercial/etc)						
My Preferences	+ Custom Alert						
Marketing	Listing Types	Message					Edit
Selling Packages	Listing Types: Sales Change Type: New Listing	Custom Messa This is custom to	ge: ext. Line 1				Edit
SMS	Bedrooms Match: Required	This is custom to This is custom to	ext. Line 2 ext. Line 3				
SMS quota		This is custom to This is custom to	ext. Line 4 ext. Line 5				
SMS templates		This is custom to This is custom to	ext. Line 6 ext. Line 7				
cPanel		This is custom to	ext. Line 8				
Login to cPanel							

Select the Criteria Alerts tab.

If you are logged in via salesrep admin select **Setup** at the top and then **Criteria Alerts.**

Varelle Johnson Home ReNet APP Calendar Website Setup				
		Listings Contacts Staff Support		
		Search by Property ID, Price or Address		
My Listings	My My Touchp Contacts Reports Mana	ioints Iger 12 Tasks 2 Enquiries 1 SMS Messages WHC II 100 % Select a Video Tutorial 0 Iger 12 Tasks 2 Enquiries 1 SMS Messages WHC II 100 % Select a Video Tutorial 0		
CONTABLE S	+ Property	+ Contact + Enquiry + Ofi Attendee + Inspection + Offer + Note + Appraisal		
	Setups Manager		N.	
的现在是有效的	Touchpoints Manager™ Tasks S	ales Process Documents Goals SMS Quota's SMS Templates		
网络内尔美国和	Touchpoints Manager™ Setu	p		
NY ASSANCE	General Touchpoints Auto Respon	nders Touchpoints Auto Criteria Criteria Alerts Internal Office Alerts		
	Anage Custom Alerts			
	You can create a custom messag	ge to your contacts for email alerts, adjust the bedrooms matching or turn alerts off & on.		
AN THUNK IN	Note:by default alerts are ON and match contacts with listings based on locations, prices and types (house/commercial/etc) This is optional and there is no requirement to set this up.			
	(+ Custom Alert)			
	Listing Types	Message	Edit	
	Listing Types: Sales Change Type: New Listing Bedrooms Match: Required	Custom Message: This is custom text. Line 1 This is custom text. Line 2 This is custom text. Line 3 This is custom text. Line 4 This is custom text. Line 5 This is custom text. Line 6 This is custom text. Line 7 This is custom text. Line 8	Edit	

From here you have the ability to customise the alerts that are sent for your listings.





Any changes that are made in this area will affect the whole office. You have the ability to:

- Turn off the alerts.
- Change the greeting/email message that is sent to your contact.
- Change the alerts that are sent for sale properties or rental properties.

To update these alerts select + Custom Alert



Tracking of Automatic Alerts

Once your listing alerts and eBrochures start being sent from the system, if they include properties, we will start tracking the opens and clicks automatically.

When a contact selects the **details** link from one of your properties, they will automatically start to follow this property through the Touchpoints Manager and the buyer requirements area.

Contacts with Touchpoints Manager™, ordered by strong activity, then recent activity			Criteria	Emailed
& Jess	0405 130 105 📄	No Email	~	

From the **Touchpoints Manager** tab on a listing you will see any contact that has selected the property by the **likes property** thumbs up.

You can also see this directly from a contact card by going to the **Touchpoints Manager** tab.



You will also see this directly from the Buyer/Renter requirements tab.

There are 3 properties in your database matching the above.

	♦ ♥ 27 Aquamarine Drive, TOORMINA ON THE MARKET	Land size: 4000 Square Mtr 🔚 4 🖾 1 📻 1
	Our Brand New Home Our Brand New Home	





Adding Open Home Attendees

There are three places where you can add open home attendees:

The main screen of ReNet From any listing

From any contact

To add this select the + Ofi Attendee option + Ofi Attendee

If you are selecting this from the main screen of ReNet or a contact, the form will look like:

	Select OFI Range From 29-05-2017 To 28-06-2017 To For Sale Search OFI's >>				
	Select OFI 1. COFFS HARBOUR 19 First Avenue OFI: Tue May 30th 01:00pm - 01:: 0				
	A Edit: OPEN FOR INSPECTION				
Op	en for Inspection T	ue 30-05-2017 01:00 pm - 1:25 pm			
	F Ofi Attendee & Comr	ments			
#	Contact	Comments	Status		
1	tegantehan	Comments:			
Vi	sitors and Comments				
	Date	30-05-201 🕮 @ 1 🔅: 00 🗢 PM 📀 Duration 0 😒 25 Mins 😋 🗌 (Show state time i.e. QLD time)			
	OFI Conducted By Ben Mewburn				
	Select Multiple Contacts	Search by Contact ID, name or phone number + Contact			
	Total Number of Visitors	2 (nett inclusive of all visitors and contacts)			
	Comments	General comments from contacts about this open house Your own agent comments about this open house			

Select OFI Range: Select the date range for your open homes. Select **Search OFI** and this will then populate the results into the Select OFI drop down.

Select OFI: Use the drop down to select the open home you would like to add attendees to.

If you are adding this from a listing you will see all open home times listed:

[4	4665855] V	Vednesday 28th	Jun 01:00 am - 1:30 am	Edit
At	tendees: 0 (+ Attendee & Comm	ents	
1	28-06-2017 01:00 am	Enter attendees	Comments: Nill	Active 🗘 Edit X
[4	4460305] T	uesday 20th Jun	01:00 am - 1:30 am	Edit
At	tendees: 0 (+ Attendee & Comm	ents	
1	20-06-2017 01:00 am	Enter attendees	Comments: Nill	Active 🗘 Edit X
[4	4400645] N	londay 19th Jun	01:00 am - 1:30 am	Edit
At	tendees: 0 (+ Attendee & Comm	ents	
1	19-06-2017 01:00 am	Enter attendees	Comments: Nill	Active 🗘 Edit X





+ Attendee & Comments

To add single contact select + Attendee & Comments

To add multiple attendees select **edit** to the right hand side of the open home date and

time.

Single Open Home Attendees

To a attendees singularly use the + OFI Attendee and Comments

+ Ofi Attendee & Comments

🤌 Edit: OPEN FOR IN:	A Edit: OPEN FOR INSPECTION CONTACTS COMMENTS		
Select Contact	Search by Contact ID, name or phone number + Contact		
Comments	Comments from this contact		
Source	Select Source C + Sources		
Interest Level	0 Contract Issued		
Status	Active		
Set a task or reminder for	or this activity		
Task Staff	•• Me •• STask Due Task Date		
Task Activity	Phone Call Email Brochure Letter PDF SMS Other		
Task Repitition	No Repitition Daily Weekly Monthly Yearly		
Task Priority	Ity Normal Priority High Priority Low Priority		
	Save		

Select Contact: Search using contact name or unique criteria to see if your contact already exists in the database. If this attendee is not in the database, use the **+ Contact** on the right hand side to add them. This will open up a contact card.

Comments: This is the comments from the contact about the house that they have viewed.

Source: This is the source of where they found out about the open home.

Interest Level: The contacts interest level in the property.

Price Indication: What the contact believes the property is worth.

Status: This status will link back to your prospecting area.

Set a Task: You have the ability to set a reoccurring task reminder in relation to the open home attendee you are entering.





Adding multiple open home attendees

Visitors and Comments			
Date	28-06-201 🕮 @ 1 0: 00 0 AM 0 Duration 0 0 30 Mins 0 (Show state time i.e. QLD time)		
OFI Conducted By	Varelle Johnson		
Select Multiple Contacts	Search by Contact ID, name or phone number + Contact		
Total Number of Visitors	(nett inclusive of all visitors and contacts)		
Comments	General comments from contacts about this open house Your own agent comments about this open house		

Select Multiple Contacts: From here you are able to search for each contact. When selecting the contact this will attached to the open home you are editing. If your contact is not yet in the database. Use the **+ Contact** option on the right hand side.

Total Number of Visitors: This is the total number of attendees at the open home.

Comments: These include:

General Comments: General comments attendees made about the house. Agent Comments: How the agent felt the open home went.

Adding Property Inspections

There are three places where you can add inspection attendees:

The main screen of ReNet From any listing From any contact

To add this select the + Inspection option

+ Inspection

Select Listing						
Concor Library	Search by Property ID, Price or Address					
	or _ this is another agents listing					
Select Multiple Contacts	Search by Contact ID, name or phone number + Contact					
Date	29-06-2017 Time 1 0: 00 0 pm 0					
Inspection	1st O Inspection By Varelle Johnson					
Sources	Booked By Celect Source C + Sources					
Comments	Comments from this contact regarding this inspection					
Interest Level	0 S Price Indication \$\$					
Status	Active					
Set a task or reminder f	or this activity					
Task Staff	•• Me •• C Task Due Task Date					
Task Activity	Phone Call Email Brochure Letter PDF SMS Other					
Task Repitition	No Repitition Daily Weekly Monthly Yearly					
Task Priority	Normal Priority High Priority Low Priority					





Select Listing: Select the listing that the contact has viewed. If you are adding this from the listing screen, this option will not display.

Select Contact: Search using contact name or unique criteria to see if your contact already exists in the database. If this attendee is not in the database, use the **+ Contact** on the right hand side to add them. This will open up a contact card. If you are adding the inspection from a contact, this option will not display.

Date: This is the date and time that they will be attending the inspection.

Inspection: The type of inspection that you have completed, and the staff member who has conducted the inspection.

Sources: The staff member who booked in the inspection, and where they found out about the property from.

Comments: This is the comments from the contact about the house that they have viewed.

Interest Level: The contacts interest level in the property.

Price Indication: What the contact believes the property is worth.

Status: This status will link back to your prospecting area.

Set a Task: You have the ability to set a reoccurring task reminder in relation to the inspection you are entering.

Adding Property Offers

There are three places where you can add property offers: The main screen of ReNet From any listing From any contact

To add this select the + Offer option







Select Listing	Search by Property ID, Price or Address + Property					
Select Contact	Search by Contact ID, name or phone number + Contact					
Offer Date	29-06-2017 Taken by Varelle Johnson					
Offer Amount	S As vendor counter offer					
Offer Accepted	WIP (Work in progress)					
Offer Status	Active					
Set a task or reminder f	or this activity					
Task Staff	•• Me •• STASK Due Task Date					
Task Activity	Phone Call Email Brochure Letter PDF SMS Other					
Task Repitition	No Repitition Daily Weekly Monthly Yearly					
Task Priority	Normal Priority High Priority Low Priority					

Select Listing: Select the listing that the contact has placed an offer on. If you are adding this from the listing screen, this option will not display.

Select Contact: Search using contact name or unique criteria to see if your contact already exists in the database. If this person is not in the database, use the **+ Contact** on the right hand side to add them. This will open up a contact card.

If you are adding the offer from a contact, this option will not display.

Offer Date: This is the date they have submitted the offer, and the staff member who they spoke to.

Offer Amount: This is the offer that has been submitted and also the option to select if this is the vendors counter offer.

Offer Accepted: From here you have the ability to select:

WIP (Work in Progress) Accepted Rejected

Status: This status will link back to your prospecting area.

Set a Task: You have the ability to set a reoccurring task reminder in relation to the offer you are entering.





Contact History and Automatic Actions

Once your contact activity has been added, either via ReNet or your App, this will show in different areas through the ReNet software:

In the property chronological history In the contact chronological history In your Touchpoints Manager for prospecting In your internal staff & property reports

In your vendor reports

When your contact activity is added, provided you enter an email address into the system, we will automatically complete some actions:

We will send an eBrochure of the property that they have completed an activity for. The eBrochures include:

Open Home Attendee Inspection by Appointment Offer

If they do not have buyer requirements added, we will automatically add buyer criteria based on the property that they have shown interest in.

Buyer Auto Criteria and Alerts

Through the setup area, you have the ability to customise:

The activity alerts that are sent to your contacts eg, Open Home, Inspection and Offer.

The buyer criteria range, property types and suburbs that will automatically add based on contact property interest.

If you are logged in through administrator admin, select **Setup** and then **Touchpoints Manager** on the left hand side.

Home Listings	Contacts	Office	Reports	Website	RMA Sales	Marketing	Setup	Support			
Office			+ Property	+ Contact	+ Enquiry + O	fi Attendee 🚺 🕂 II	nspection +	Offer + Note	+ Appraisal		
Touchpoints Manager™											
Sales Process											
Default Locations	Touch	points mana	iger ···· Setup			_					
Document templates	Genera	Touchpoint	s Auto Respon	ders Touchp	oints Auto Criteria	Criteria Alerts	Internal Offi	ce Alerts			
Task Manager	Ja M	anage Auto Res	spondere								
Fields for Listings		anage Auto Ne.	sponders								
Contacts Categories	YC	You can create a custom message to your contacts for ebrochures after an enquiry, inspection or offer.									
Quarterly Sales Goals	No Th	Note:by default brochures are ON unless a property is SOLD or archived This is optional and there is no requirement to set this up.									
My Preferences											
Realestate.com.au Enquirie	s (+ Cus	tom Auto Res	ponder								
Marketing	Touchp	oint Type	Message							1	Edit
Selling Packages	1 100 mark (100	Property Offer	s EMAIL Mes	sage: Default al	lert messages used						Edit
SMS		Enquirie	s EMAIL Mes	sage: Default al	lert messages used						Edit
SMS quota											





If you are logged in via salesrep admin select **Setup** at the top and you then have an option to choose:

Varelle Johnson Home ReNet APP Ca	alendar Website Setup		
Ay Listings	My My Contacts Report	Isistings Contacts Staff Support Touchpoints Search by Property ID, Price or Address Manager Tasks 2 Enquiries 1 SMS Messages Whick Vogo ? Select a Video Tutorial Contacts	
	Constant of the second	Property + Contact + Enquiry + Ofi Attendee + Inspection + Offer + Note + Appraisal Tasks Sales Process Documents Goals SMS Quota's SMS Templates ar M Setup Auto Responders Touchpoints Auto Criteria Criteria Alerts Internal Office Alerts inders stom message to your contacts for ebrochures after an enquiry, inspection or offer. thures are ON unless a property is SOLD or archived there is no requirement to set this up.	
	+ Custom Auto Resp	onder	E dia
Section and County and	Property Offere	message FMAII Messane: Default alert messaries usert	Edit
and the second second second	Enquiries	Email Message, Default alort messages used	Edit
	Liquites	Emple modage. Dolan alor modage add	

Touchpoints Auto Responders: To customise the activity emails that are sent to your contacts.

Touchpoints Auto Criteria: To customise the criteria range, property types and suburbs that will automatically add based on contact property interest.

Touchpoints Auto Responders

From here you have the ability to customise/manage the automatic eBrochures that are sent to your contact based on the interactions that they have had with a property. Anything that you do in this area will be effective for the whole office.

Custom Touchpoints Manager Brochure					
Which Touchpoint	Property Inspections ᅌ	Custom message for this alert, note: this will remove the default alert messages on alerts			
What sort alert	eBrochure ᅌ				
Text only	Do not send property				
Active	• Yes 🔿 No				

Which Touchpoint: You have the option of: Property Inspections Open home attendance Property Enquiries Property Offers

What sort alert: The type of alert that will be sent to the contact. This will only send electronic communication to their email address.





Text only: if you have **Do not send property** selected, this will only send a text email to the contact. For this to happen you must enter something in to the **custom message** field.

If you have the Do not send property option selected and you leave the custom message area blank, you contact will not receive any communication.

Active: You have the ability to turn the alert on or off.

Touchpoints Auto Criteria

From this area you have the ability to set the criteria that is automatically added for your contact, based on the property that they have had an activity for.

For this to automatically add, you must have an email address for the contact entered, as we then use this to send the automatic alerts.

Anything that you save in this area will be effective for the whole office.

On Off Price Range %	6 30	Same Any Property Types	Same Any Location	Save
----------------------	------	-------------------------	-------------------	------

Price Range: The percentage of price above and below the price required entered for the property. Eg, if you price required is 500000 this will enter a minimum price of 350000 and a maximum price of 650000.

Property Types: This is based around the type of property that they have viewed. By default we will only send them the same property type. Eg House

Location: This will automatic select locations where they have viewed, or had interactions with a property. Eg. If your contact comes to view a property in Coffs Harbour in the morning, this location will be selected. In the afternoon they may come to a house at Sawtell, this location will then be automatically added.

If you have contacts that you have manually added buyer criteria for, this will not be altered.





Vendor Reporting

One you have added your property activity, you are able to report on this for your vendors.

There are three main vendor reports: Electronic vendor report Mobile Friendly vendor login PDF Vendor Report

Electronic Vendor Report

For this vendor report you must be subscribed to the prospecting manager.

For this report to send, you must have an owner attached to the listing and the owner must have an email address.

If you would like to send to more than one owner, from the **Profile** tab select **+ Owner** and add multiple owners.

Andree Ca	Authority: Live: Status:	Exclusiv 52 Days Current	Listing: by Varelle e Listing: by Va on market sind Current	relle Johnson on May 08 1 te agreement date & 44 Da	17 Expiry: 05 ays on marke	-08-17 tt since live 16-05-20	17.	
	Price: Modified	: (Search : Thu 29th	price \$469,000 n Jun 2017 @ 1) 0:39 am				
Profile 33 Touchpoints	Manager™	8 Notes	Prospecting	15 Campaign Manager	Brochure	Owner Reporting	1 Sales Process	Tasks
+ Owners:	Andree Ca	rdow						
	Luke 2			Ľ				

From any property select the **Owner Reporting** tab.

ID:17941825	- 27 Aquamarine Drive, TOORMINA	Edit
+ Enqu	uiry + Media + OFI Attendee + Inspection + Expense + Offer + Note + Contract + Task	
Owners: 🧏 Andree C	ardow, 🎗 Luke 2, 🤱 Varelle	
	Authority: Exclusive Listing: by Varelle Johnson on May 08 17 Expiry: 05-08-17 Live: 52 Days on market since agreement date & 43 Days on market since live 16-05-2017. Status: Current Image: Current Image: Current Image: Current Price: (Search price \$469,000) Modified: Thu 29th Jun 2017 @ 10:39 am	
Profile 33 Touchpoints Email Owner Report Profile	Manager ^M 8 Notes Prospecting 15 Campaign Manager Brochure Owner Reporting 1 Sales Process Tasks age Views Set Up Online Owner Login	
Dates	From 08-04-2017 🗮 To 24-08-2017 🗮 Select Date Range 😏	
Show/Hide	🥑 20 📀 Touchpoints Manager ™ 🕑 Graphs 🗌 Hide Chronological History	
Listings Activities	☑ Exclusive Data ☑ Offers ☑ Enquiries ☑ Inspections ☑ Open Homes ☑ Contracts Issued ☑ Ebrochure ☑ Marketing ☑ Price Changes ☑ Market Appraisal	
Joint Owner Activities	🗹 Listing Notes 🗹 Owner Notes 🗹 Listing Tasks 🗌 Owner Tasks	
View Options	Show Chronologically 29-06-2017 C date view	
Contacts Name	Show contact name as Show Contacts FULL Name	
	Create Owner Report	





Dates: The dates for the chronological history that you would like to display.

Show/Hide: You have the ability to show/hide the Touchpoints Manager matching contacts, graphs and the chronological history.

Listing Activities: Select the activity that you would like to show your vendor.

Joint Owner Activities: Have the ability to hide personal correspondence eg Notes and tasks.

View Options: Have the ability to view chronologically or group activities together.

Contact Names: Have the ability to supress contact details.

Once you have filtered your report, select **Create Owner Report.** This will populate your report into an electronic view.

Click he	are to PREVIEW then EMAIL the Vendor this report
Chronologica	l History from 08-04-2017 to 24-08-2017
05-08-2017	EXCLUSIVE EXPIRY:
29-06-2017	EBROCHURE: Sent @ 10:39 am by Varelle Johnson, Subject: Thank you for your offer. Recipients: 1 View Clicks & Openings.
29-06-2017	EBROCHURE: Sent @ 10:34 am by Varelle Johnson, Subject: Thank you for inspecting. Recipients: 1 View Clicks & Openings.
29-06-2017	INSPECTION: J: 10:25 am: (Active)
29-06-2017	OFFER: S: Offer of \$500,000, taken by
28-06-2017	OFI: Varelle Johnson @ 01:00 - 1:30 am
28-06-2017	EBROCHURE: Sent @ 11:26 am by scott schindler, Subject: Some properties for you Recipients: 2 - Openings: 8 View Clicks & Openings.
27-06-2017	EBROCHURE: Sent @ 01:08 pm by Varelle Johnson, Subject: Open Homes for Saturday Recipients: 4 - Openings: 8 View Clicks & Openings.
27-06-2017	INSPECTION: LC: 11:46 am: (Active)
27-06-2017	EBROCHURE: Sent @ 11:04 am by Varelle Johnson, Subject: Thank you for attending the open home. Recipients: 1 - Openings: 4 View Clicks & Openings.
27-06-2017	EBROCHURE: Sent @ 11:03 am by Varelle Johnson, Subject: Thank you for attending the open home. Recipients: 1 View Clicks & Openings.
27-06-2017	EBROCHURE: Sent @ 10:32 am by Varelle Johnson, Subject: Thank you for your enquiry. Recipients: 1 - Openings: 2 View Clicks & Openings.
27-06-2017	ENQUIRY: AC: Would like a price guide (Source:)
22-06-2017	EBROCHURE: Sent @ 10:41 am by Varelle Johnson, Subject: Thank you for attending the open home. Recipients: 1 View Clicks & Openings.

To preview the email before you send this, select **Click here to PREVIEW then EMAIL the Vendor this report.**

This will open into a new screen.





Message to the vendors	Hi Varelle			
	<i>h</i>			
Online Login	Hide vendor login			
Click here to PREVIEW with above message or Click here to SEND the Vendor this report by email				

You have the option to add you own custom salutation with a recap of the property history.

When you are ready to send select **Click here to SEND the Vendor this report by email**.

When this is sent, this will log in the contact and property chronological history and will also track the opens and clicks.

Touchpoints Manager Online Login

Through the electronic owner report, vendors will also have access to a mobile friendly view to their report via an online login.

From the preview of your electronic owner report, you will see the option to **Click here for** your online Touchpoints Manager login.

		Click here for your online Touchpoints Manager™ login					
Date	Activity	Description					



This will then take you through to a mobile friendly design of the owner report.





By default we will hide all contact information. The left hand side navigation will lead through to the filters that you have selected in the owner report tab.

We have added the addition of recent sales so that agents are able to use this report for listing presentations. This will only show the recent listing of the agent who has listed the property.

The other great thing that agents love about this report is that it updates in real time. Any time this is accessed from an owner report. Vendors love that they can see the most up to date information.

PDF Vendor Report

From the **Brochure** tab on any listing, you also have the ability to create a PDF vendor report.



This report is designed to show the full chronological history for your property including notes and tasks. This will show in a list view only. On the front page of the report is a snap shot of the property history and then the listed activities.

To create this report select your vendor report option and then select Next.

Select your date range for the report and enter any additional information that you would like to include.

Select **Create PDF** and this will then download a PDF directly to your computer.





Adding Market Appraisals

+ Appraisal

To add a market appraisal select + Appraisal 🔜

You are able to do this from the main screen of ReNet or from any contact.

Select Listing	Search by Property ID, Price or Address + Property
Select Contact	Search by Contact ID, name or phone number + Contact
Appraisal Date	03-07-2017 By Varelle Johnson
Expected Listed	• For Sale O For Rent Expected Da
Source	Select Sourced By Select Source Select Sources
Valuation	- optional valuation price range to
Reason for Selling	Select Selling Reason 🖸 🕂 Reasons
Notes	Notes about this market appraisal
Status	Active
Outcome	Select Outcome 💲 + Outcomes

Select Listing: The listing to be appraised. If this is not a listing already in ReNet, use the **+Property** button to add this listing into the system. When this is entered into ReNet it is an archived property and not live on the internet.

Select Contact: Search for your contact who is the owner of the property. If this person is not yet in the system use the **+ Contact** option to add them to ReNet. If you are adding your appraisal from a contact, this option will not be available.

Appraisal Date: The date the property was appraised and the staff member who completed the appraisal.

Expected Listing: An estimated date of when this listing will go live. You are then able to search for this through matching buyer/renter requirements.

Source: Where the contact found out about your office.

Valuation: The valuation for the property.

Reason for Selling: The reasons you are able to customise by using the **+ Reasons** button.

Notes: Any additional notes about the appraisal.

Source: This will link back to your prospecting area.

Outcome: You are able to customise your own outcomes by using the **+ Outcomes** button.





Once this has been entered into the system this will automatically:

- Create the relationship between the contact and the property
- Log as chronological history against the property
- Log as chronological history against the contact
- Log in the Touchpoints Manager for the agents prospecting
- Show in all internal market appraisal reports

Filtering your Potential Sellers

After your market appraisal has been entered, you are able to filter your potential sellers by temperature:

Hot – Potential Sellers who are keen to sell as soon as possible. This will show with a red contact icon.

Warm – Potential Sellers who are looking to sell in the near future. This will show with an orange contact icon.

Normal – Potential Sellers who have received a market appraisal but have not made a decision of when they will sell. This will show with a blue contact icon.

From any contact select the **properties** tab and this will show the properties that they own.

rofile	Touchpoin	ts Manager™ F	Prospecting	1 Properties	Inspections	Offers	2 Notes	Referrals	Documents	Tasks	
+ At	Attach a Property to Portfolio.										
		Remove Pro	Owner Owner Owner Owner Owner Owner Owner Owner	e TOORMINA r from 20-06- wner	-201 🔲 to		Pric	e Paid \$		ave	
(+	Add Market	Appraisal							Le	arn About I	Market Appraisals
#	Date	Appraisal Rep			Notes						
1	02-06-2017	Varelle Johnson	1		Value: 0 Outcome: Acti Source: Advoo	ve ate News	paper				Active

From the **Normal Vendor** drop down, you have the ability to filter your market appraisals. This will also link through to your Touchpoints Manager.

To add additional properties that the contact owns, select + Attach a Property to Portfolio.

+ Attach a Property to Portfolio.

This will prompt you to enter the address of the property. If the property does not exist in the database you will see a **+ Property** option to add a new listing. This listing will be archived and not live on the internet.





To remove this contact as the owner select **Remove Property from Owner**.

Remove Property from Owner

This will remove the relationship between the property and the contact.

To add a market appraisal for this property select + Add Market Appraisal.

+ Add Market Appraisal

This will bring up your market appraisal screen.

Touchpoints Manager/Prospecting

With all of the activity that you log into the system, and the eBrochures that are automatically sent from the system, we will start to track this through our touchpoints manager to reveal who your hot prospects are, and the properties that your contacts have shown particular interest in.

From the main screen of ReNet

From the main screen of ReNet select the **Touchpoints Manager** icon beside the smart search:



This will be all of the activity for the staff member logged into the system.

Touchpoints Manager ™

Touchpoints Manager	Enquiries	Inspections	OFI Attendees	Offers	Appraisals	My Activities	Owner Reports		
Contact Type	ALL Conta	- ALL Contacts 😒 All Temperatures 😒							
Contact Categories	Contact Categories Are in 😋 Any Category 💿 💿 And are in 😒 Any Category 😒 💿								
Touchpoints Manager	Has Criteri	V Has Criteria 🗌 Market Appraisal 🗌 Offered 🗌 Inspected 🗌 OFI Attended 📄 Issued Contract (🗌 Show Emailed)							
Touchpoints Dates	From 03-01-	From 03-01-2017 🔲 To 03-07-2017 💭							
Order By	Order By Touchpoints Score 🖸 DESC 🗘 Then Modified Date 🗘 DESC 💸 Filter to Any Compatibility 🗘								
More	O Advanced	Filters 10	ᅌ results per p	age Adv	vanced: Touch	oints Manager™	View ᅌ		





From the Touchpoints Manager tab you can filter:

Contact type: Current Vendors, buyers, renters, potential sellers, all vendors and landlords. Current Vendors: are added as an owner on a property that is currently live. Buyers: A contact that has buyer requirements added. Renters: A contact that has renter requirements added. Potential sellers: Are contacts that have a property added to their portfolio that are not live on the internet.

Contact Categories: In addition to contact types, you are able to assign your contact to category and filter by these in the touchpoints area.

Touchpoints Manager: Have the ability to filter the type of activity you are prospecting on.

Touchpoints Data: Select the data range for the data you would like to display.

Order By: Select the order by options for the data.

Once you have added your filters select Search.

	Send	SMS Send eBrochure	Make Favourite				
Displaying results 1 to	0 10 of 22						
« Previous 1 2	3 Next »						
Contacts with Touchpoints Man	ager™, ordered by s	strong activity, then recent activity	Market App	Offered	Inspected	OFI'd	Criteria
& Alex			~	~		~	~
& Michelle			v		~	~	~
🎗 Robyn Parish	8		v		~	~	~
L Sue			~		~	~	~
L Ebony		_	v			~	~
& Shandy		_		~			~
& Andree Cardow		-	v				~
& Varelle			~			√	√
Emily Mitchell				~			~
& CAVALLARO		No Email	×				~

From here you will see all of your matching contacts and the touchpoints that they have had in general with all of the properties that you have in your account.

By selecting the tick icon for the activity, this will open further the contact and show the particular activity for all properties.





From your Touchpoints Manager icon, you will also see all of your contact activity split via tabs for ease of prospecting.

Touchpoints Manager ™ Enquiries Inspections OFI Attendees Offers Appraisals My Activities Owner Reports

Touchpoints Manager: All of your contacts with all property activity.

Enquiries: All enquiries that have come from: Your ReNet powered website Our ReNet portals Realestate.com.au Domain.com.au Have been manually logged into the system

Inspections: Inspection by appointments where you are taking one contact through a property.

OFI attendees: Your open home attendees after the weekend Open Homes.

Offers: Any offers that have been submitted for your properties.

Appraisals: Any market appraisals that have been added into the system.

My Activities: A chronological history report of the activity that you have added into the system for that day.

Owner Reports: The ability to send our owner reports for your properties.

When all activity is logged into the system, either manually, imported directly from another source or via our app it is logged with a status of **ACTIVE**. This means that this is something that is required to be followed up or you are still prospecting.

#	Date	Property	Contact	Comments	
1	29-06-2017 10:25 am	27 Aquamarine Drive TOORMINA	Jace	inspection Interest Levels: IL:0 Comments: -	Active

Once the activity has been completed, use this drop down to mark the activity as **completed**. This will remove this activity from your prospecting list only. The history of the activity will remain in ReNet logged against the contact and the property and will remain in reporting.





You are able to search back on this at any time by using the status filter in your search area.

Touchpoints Manager	Enquiries Inspections OFI Attendees Offers Appraisals My Activities Owner Reports						
Date Range	From 03-07-2016 To 04-07-2017 or Select Date Range 📀						
Staff/Office	Staff/Office Varelle Johnson 📀 😳 All Departments 💿 😳 All Offices 📀 😳						
Select Listing	Search by Property ID, Price or Address + Property						
Status	✓ Active Completed						

From any Property

When looking at a listing select the **Touchpoints Manager** tab to show contacts who have had direct activity with this property.

	Send SI	MS Send eBrochure	EMAIL the owners report					
Displaying results 1 to 10 of 199								
x Previous 1 2	3 4 5	6 7 8 9	10 Next »					
ontacts with Touchpoints M	anager™, ordered b	y strong activity, then recent activ	ity	Offered	Inspected	OFI'd	Cr	
Shandy	-			~			~	
Emily Mitchell	8			v			~	
Michelle	8				~	~	~	
Robyn Parish	8				~	~	~	
Sue					~	~	~	
Jace					~		~	
Jodi						~	~	
Lyndell Cardow					~		~	
David						~	~	
Rob Campbell		No Email				~	~	

For the property, we will reveal the hot prospects based on the number and type of activity that they have had for the listing. We class an offer as the highest activity so this will always show at the top.

By selecting a contact name you are able to see the Touchpoints Manager tab for the contact and the other property activity that they have completed.

By hovering over the criteria tick for the contact, you will be able to see the criteria that has been entered for the contact.





From any Contact

Profile	Touchpoints Man	ager™	Prospecting	Properties	1 Inspection	ns Offers	Notes	Referrals	Documents	Tasks			
Touchp	Touchpoints Manager M Buyer Requirements Renter Requirements Unfollowed												
Mark All Activities as Completed								Offered	Inspected	OFI'd	Emailed		
18 Combine Street, COFFS HARBOUR									~				
27 Aquamarine Drive, TOORMINA										~			

From any contact, we will also weight the activity they have had with their properties, showing all offers at the top. You are able to see the particular interest that your contact has had with any properties in the database.

RP Data Integration

For some offices, you may need to upgrade to use this feature. The cost to upgrade is \$30/month for the whole office.

With RP Data you have the ability to import property photos and attributes directly into your ReNet account to build your farm areas.

It is great for market appraisals, to view previous sales history and have direct links to create CMA and Valuation reports directly from RP Data.

From any listing select the **Prospecting tab** and then **import from RPdata/Corelogic.**

				1					
Profile Touchpoints M	lanager™	Notes	Prospecting	Campaign Manager	Brochure	Owner Reporting	Sales Process	Tasks	
Similar Potential Sellers	s import fr	rom RPd	ata/Corelogic						
RPdata/Corelogic Prop	erty RPdat	ta/Corelo	ogic Search	RPdata/Corelogic Re	lated Proper	ties			
🤌 The property has no	ot been map	ped to RI	Pdata/Corelogi	c, map this property to	the property	in ReNet so you can	run the RPdata/C	orelogic rep	oorts from here.
Owners									
Key Attributes	Zoned : Lo Bedrooms Bathrooms Garages : Car Space Land Area Floor Area Category :	w Densit s:4 s:1 2 s:2 a:472 a:472 a:112 : House	ty Residential						
CMA Report CMA Report CMA Report Report Into ReNet ALL available data									
				st co	reLogic [.]				

From here you will see the owners name only and any previous sold information. From the bottom you will see direct links to create your RP Data reporting and a button to **Import into ReNet ALL available data.**





Import into ReNet ALL available data

When selecting this option, this will download all of the property images and attributes and add these against your listing.

If you are adding this against a listing that already has images and attributes added, these will be replaced with the RP Data images and attributes that you are importing. If you would like a record of the RP Data images and attributes, create a second listing and then import the data.

When selecting the **Import** option you will see the below notification:



This notification explains that the owners contact details and previous sales history for the property will not be imported into the system.

When you select **OK** this will import the property details into the system.

RP Data/Corelogic Search

Through this area you are able to import same street properties, On the market properties or Recently sold properties directly into the system.

Please enter your search options and then select Search.



You will then see all of your matching properties populate.

From the right hand side, you will see the ability to import the property. When this is imported it will create a new archived listing in the system and copy the listing images and attributes directly into ReNet.





Agents have let us know that they can then use this property data to send eBrochures to potential sellers. If you do this you will need to ensure that you have the owners information in the system.

You are also able to create PDF marketing of sold listings in the area. These are great tools to have in your listing kits.

You can also create single property PDF's for listing kits, to show the marketing options for a potential vendor.

eBrochures

Sending bulk eBrochures

Throughout the system you will see the ability to send bulk eBrochures.

Send eBrochure

There are several areas where you are able to create an eBrochure from. These include:

From a listing search From a contact search From the marketing area Directly from a contact card From the Touchpoints Manager From the task manager

With all of the eBrochures that are sent from the system, by default they are sent from the primary contact manager. You are able to adjust where this eBrochure comes from for the manual eBrochures that you send from the system.

There is also an unsubscribe option on every eBrochure that we send from the system. If a contact selects to unsubscribe, this will automatically link back to their contact ID and unsubscribe them from receiving marketing. The primary contact manager will also receive an email advising that a contact has unsubscribed.

With all of the eBrochures that are sent, we also start to track this. If you have a contact that selects a property to view more than 3, or more than 5 times, the contact manager will receive an alert that they have a contact that is showing interest in their property.





Manually Unsubscribing Contacts

When setting up your contacts they are subscribed to two main types of eBrochures:

Manual eBrochures – These are the eBrochures that you select **Send eBrochure** from within ReNet to send to your contacts.

Automatic Alerts – These include your new listing, price reduction, sold, auction and automatic activity eBrochures.

To unsubscribe contacts from manual eBrochures bring up your contact card and select **Emails** beside the contact email address.



From the emails area untick Receives General Marketing eBrochures.

To unsubscribe from automatic alerts, from the contact profile tab, in the buyer requirements section select **Search for matching properties** and then select **Edit BUYER Requirements** or **Edit RENTER Requirements**.

+ Buyer Requirements	Learn About Buyers	
Buyer Spending Range	Between \$0 and \$609,700, ASAP	
Buyer Locations	ARMIDALE BELLINGEN BEN LOMOND BOAMBEE BOAMBEE EAST BONNIE DOON BONVILLE , TOORMINA	
Buyer Property Types	Any property type	
Matching Properties	Search for matching properties	
Touchpoints Manager 7 Spending Range	Buyer Requirements Renter Requirements Unfollowed Edit BUYER Requirements Delete BUYER Requirements Minimum Price 0 Maximum Price 609700	
Locations	ARMIDALE, BELLINGEN, BEN LOMOND, BOAMBEE, BOAMBEE EAST, BONNIE DOON, BONVILLE, TOORMINA	
BUYER Type	Normal BUYER 📀 Wants to act ASAP 😒 🖉 Receive buyer	Match Email Ale

From this area untick the option to **Receive buyer Match Email Alerts.**

If your contact selects the unsubscribe option from an eBrochure that they have received, they will automatically be unsubscribed from both manual and automatic listing alerts.





Subscribers

If you are sending from a listing search, or from the marketing area you have the ability to select the subscribers to send to.

		a once you press sena)	Learn	About Ebrochure
Create eBrochure For Varelle Johnson	0			
Staff Members All Staff	All Staff		Contact Categories	
Contacts • None Buyers	Renters All	0	BRICKY BUILDER BUILDER	
Mail List Subscribers ONONE OBuyers	Renters All	0	СМНР	
ReNet Subscribers ONONE OBuyers	Renters	0	COACHING 2017 COMMERCIAL	
ReNet Mail ONONE Buyers	Renters	0	DEVELOPER DEVELOPER	
Optional Enter any extra ema	ail addresses here		FIRST HOME BUYER IA MEMBER INSURANCE	Show Numbers

Contacts: These are the contacts that have been added to your ReNet database.

Mail List Subscribers: These are stored in a separate area of ReNet. This area stores only email addresses and they will not receive any automatic communication from your system.

ReNet Subscribers: These contacts have signed up through our real-estate-australia portals.

ReNet Mail Subscribers: These contact have signed up through our real-estate-australia portals.

Contact Categories: These are the categories that you have in your ReNet system. You are able to select the category and then select **Show Numbers** to populate who this will send to.

eBrochure Content

eBrochure Conter	Brochure Content						
eBrochure Su	eBrochure Subject						
eBrochure Text	eBrochure Option	ned with Boxes HTML eBro	chure URL eBrochure				
🤌 Search Tem	plates OR add new	eBrochure content, newsletter,	info, etc 🗌 Save newslette	r content and 🗌 Save as templ	ate		

Here you will enter your **eBrochure Subject** and also any additional text content for your mail out. Anything that is entered into the **eBrochure text** area will show above the listings that you have selected to send out.





Property Selection Options

Property Selection Optic	ons					
Select Properties	All Offices 😜 Select Method 😂 All Categories 😜 Current 😂					
	Use this filter to select properties a list of your of stock And/or use the below options include opens homes, auction schedules, etc					
New Listings	All C for the past 0 C days All advertised listings					
Send Auction Schedule	Send Auctions ordered by Auction (soonest to latest)					
Send Open Houses	ONOR OF Sale For Rent All Opens, Ordered By Open Time (earliest to latest)					
Sold Listings	0 📀 days ago					
	Use this filter to select which sold properties to display. This filter will fill with the listings sold in the period selected above.					
Flag Options	🛛 NEW 🖉 (REDUCED PRICE) 🖉 AUCTION 🖉 (SOLD)					
Order ALL results by	Price O ASC O					

Select Properties: By using the filters, select the properties to include in your brochures. Use the ctrl key on your keyboard to select more than one listing.

New Listings: Automatically populate your new listings into an eBrochure. Based on the day the listing was set live.

Auction Schedule: Send your Auction schedule before the weekend.

Send Open Houses: Have the ability to populate all of your open home listings automatically.

Sold Listings: Select your sold listings to send.

Flag Options: These will appear automatically if the property has been updated/set live in the last 7 days.

Order All results by: Choose how you would like your listings to display.

Sender Options

Sender Options	
This eBrochure From	The Office I send each email from the primary contact manager
Select Office	See My Property Select an office for the from contact details
Reply-to email	Staff External Email C of contact manager used for the reply-to email
Salutation Format	Hi C First Name (First) C Use Custom Placed Salutation
CC Options	and I The office (support@renet.com.au)
	TEST VIEW, this option will not send but produce a proof of your ebrochure





This eBrochure From: Select who you would like the email to come from.

Select Office: For the agencies with multi-office support, select which office details display on the eBrochure.

Reply-to-email: Where you would like all email replies to be sent back to.

Salutation format: What you would like the greeting to be to your contacts.

CC Options: This is to send yourself a copy of the eBrochure.

By default the TEST VIEW option will be selected, so you are able to see how this will look before it is sent.

When you are ready to send your eBrochure untick the test view and then select **Send** eBrochure.

my.renet.com.au s	ays:	
Results are limited to 1 have selected a broad take some time.	000, try to be sp search range the	ecific or if you results may
	Cancel	ОК

This will come up with a pop up. When you select **OK** this will queue your eBrochure to send to your contacts. You will see this open into a new tab and the icon at the left of this tab will circle while the eBrochure loads.

•	••		🦯 🥪 Amarketing sen 🗙 🗸						
~	\rightarrow C (i) my.renet.c	com.au/marketing/ebroch	ure.send.php						
0	NOTE: the 1 selected Email recipients are now queued to be sent.								
	The Bulk Email Queue se	ends at the rate of about 1 e	mail each 2 seconds or about 30 mails/minute.						
#	Contact	eMail or Open Subscriber	Sender and reply email						
1	Hi See My Property	support@renet.com.au	See My Property (support@renet.com.au)						
	Finished and eMail queued to be sent to 1 mail subscribers.								

Once you see the ReNet tick in the left hand side corner of the tab, your eBrochure has been queued. You can now close the tab.





Viewing eBrochure History

You are able to view eBrochure history from any property or contact.

From a Property

From the property chronological history select **View Clicks & Openings** link on any eBrochure.

14-06-2017	EBROCHURE: Sent @ 10	36 am by Varelle, Johnson	Subject: Thank you for attending the open home.
	Recipients: 1 - Openings: 1	View Clicks & Openings.	

From a Contact

From a contact select the **Prospecting** tab and this will show all history.

P	ofile Tou	chpoints Manager™	Prospecting	1 Properties	2 Inspections	1 Offers	Notes	Referrals	Documents	1 Tasks	
E	ails Emailed Properties										
eE	Brochure Learn About Ebrochure										
#	Date	Subject				Sender			Opens	Clicks	Clicked URL
1	08-06-20 10:17 am	17 Thank you for at Openings: 2	tending the oper	n home.		Varelle J	ohnson		2		

Sending from a Listing Search

When searching for your properties you will see an option with the ability to send an eBrochure.

Send eBrochure

When selecting this option, this will populate the properties that appear in the search result into a list where you can then select the properties to be included.

roperty Selection Option	ons
Select Properties	[17941825] : 27 Aquamarine Drive, TOORMINA - CURRENT [17102445] \$500,000 : 16 First Avenue, BIRDSVILLE - CURRENT [14482405] \$1,000,000 : 12 Sunny Avenue, WAVELL HEIGHTS - CURRENT [14481495] 1 mil : 60 Vader Rd, SAWTELL - CURRENT [13294455] : 430 Crossmaglen Rd, BONVILLE - CURRENT [14860835] \$1,650,000 : 84 Kitchener Road, ASCOT - CURRENT [14860855] \$1,850,000 : 27-29 Greenwood Close, BUDERIM - CURRENT [17379985] offers above 2M : 32 fors street , BELLINGEN - CURRENT [14860825] \$2,500,000 : 60 Royal Albert Cres, SOVEREIGN ISLAND - CURRENT [17121005] \$5,396,352 : 19 Chaucer Avenue, MALVERN EAST - CURRENT [16100315] \$30,000,000 : 2 Clarendon Street, SOUTH MELBOURNE - CURRENT

By using the CTRL key on your keyboard you are able to select and deselect multiple properties.

Use the **Subscribers** option at the top to select who you wish to send to.





Sending from a Contact Search

When sending from a contact search, first use the filters to select who you wish to send to. Once the search results have populated you will see the option to send your eBrochure.

Send eBrochure

Once selected, this will populate your contacts into a list view, with the ability to select who you want to send to.

Sele	ct All	or None Contacts selected f	or a bulk eBrochure. I
1		Varelle	Exclusive
2		Jodi	Exclusive
3		Robyn Parish	Exclusive
4		Alex	Exclusive
5		Varelle	Exclusive
6		David	Exclusive
7		Mark Stephens	Exclusive
8		Tom	Exclusive
9		Emily Mitchell	Exclusive
10		Helen	Exclusive

Under the contacts, you have the option to select which properties you would like to send.

Sending from the Marketing Area

To send from the Marketing area you must be signed in via administrator admin.

Select the Marketing Tab and then Create eBrochure on the left hand side.

Home	Listings	Contacts	Office	Reports	Website	RMA Sales	Marketing	Setup	Support	
eBrochu	res			+ Property	+ Contact	+ Enquiry + O	fi Attendee 🚶 + Ins	pection +	- Offer + Note	+ Appraisal
Create eBr	rochure									
eBrochure	History	My due	tasks & ren	ninders						

Here you will see all eBrochure options available.

Once all of your selections have been made, select TEST VIEW to view the eBrochure before this is sent.





Sending from a Contact Card

From the contact information at the top, you will see the ability to send an eBrochure from the **emails** area.

Managed by	Varelle Johnson
Categories	BUYER,
Phones	_
Emails	
Last Modified	Thu 8th Jun 2017 @ 10:18 am

By selecting this symbol once, this will lead through to your default eBrochure design.

By selecting the email address a second time this will send via the default mail program installed on your computer.

Send an email/ebrochure

Or click here to send regular email:

1
_

Sending Newsletters

In addition to sending our properties via eBrochure, you also have the ability to send out newsletters to your contacts.

To create your newsletter please create this first in publisher or a similar program and save this as a JPG image.

When saving as a JPG image you have the ability to embed this directly into the eBrochure area so this is seen as soon as the email is opened.

To embed the JPG image you will first need to upload the image through the ReNet website content manager to create the URL.

If you are logged in via sales rep admin please select **Website** from the top menu and then **Website Content**







If you are logging in via administrator admin select **Website** and then **Website Content** from the left hand side menu.

Home Listings Co	ontacts Offic	e Reports	Website	RMA Sales	Marketing	Setup	Support				
Website		+ Property	+ Contact	+ Enquiry + O	fi Attendee 🛛 🕂 In	spection -	+ Offer + Note	+ Appraisa			
Preferences											
Website Content	Website Orest										
Clearing Sales	- website Conte	ent									
Clearing and Livestock Sales	Fiji Theme Version	n 1 (162/152)	0								
Suburb Template Websites	Pages Suburb	Profiles Building	Profiles News	letter Metadata							
Staff Display Order	+ Web Page										
Testimonials	Page							Туре	Order	ID	Action
My Plugins	Home							1001	1	5772	Edit
House and Land Bulk Insert	For Sale							2300	200	5782	Edit
Website Links	1	RE/MAX informati	on					1002	1	135943	Edit
1/1		V Newsletters						1002	0	169715	Edit
and the state of the state	For Rent							2400	300	6022	Edit
	Sold							2600	400	5792	Edit
And a state of the	About Us							1002	500	5802	Edit
and a state of the second s	Contact Us							3200	900	5812	Edit

From any page with a grey background, select the **edit** button.

newsletters 1002 0 125073 E	1002 0 125073 Edit
-----------------------------	--------------------

Then select the **images** tab.

From the images tab press **select files** and choose the image off your computer. This will upload to the left hand side and generate a URL. Once this has been uploaded select the URL and copy.



Once the URL is copied, go to your ebrochure area and paste this URL into the **eBrochure text** field





eBrochure Text	eBrochure Optioned with Boxes	HTML eBrochure	URL eBrochure			
🎤 Search Tem	plates OR add new eBrochure conter	nt, newsletter, info, e	tc 🗌 Save newsletter c	ontent and 🗌 Save as	template	
<img src="http://</td><td>cdn.renet.net.au/7/images/370455</td><th>/tumblr_nyqunv0ns</th><th>V1sifu07o4_1280.jpg</th><td>" width="600"/>						
					1.	

Around the outside of the URL enter the text: At the start of the URL –

This will then look similar to the screen shot example. The width will resize the image to ensure that this will fit the eBrochure area correctly.

When you view a test view on the eBrochure, you will see that the image has been embedded into the eBrochure template.



Making a clickable image

If you would like to make this image clickable, you are able to do this by adding the below code around the code for your JPG.

At the start of the code - <a href="<u>http://www.url.com.au</u>"> This will be where you want the image to link to.

At the end of the code - This will then close the link.

Altogether the code will look like: <a href="<u>http://www.url.com.au"><img src=</u>"image URL" width="600" />

Once you paste this into the eBrochure area, your image will show a clickable hand, that will link you through to the destination URL.





Using SMS Features

To send SMS from ReNet you are required to purchase SMS credits. To purchase these you must be logged in as administrator admin.

Purchase SMS

To purchase SMS go to **Setup** and then select **SMS Quota**.

Home	Listings	Contac	ts Office	Reports	Website	RMA Sales	Marketing	Setup	Support	
Office				+ Property	+ Contact	+ Enquiry + O	fi Attendee 🚶 + In:	spection +	- Offer + Note + Appraisal	
Touchpoint	s Manager™									
Sales Proc	ess									
Default Loc	ations									
Document	templates									
Task Mana	ger									
Fields for L	istings									
Contacts C	ategories									
Quarterly S	ales Goals									
My Prefere	nces									
Realestate	.com.au Enquirie	IS								
Marketin	8									
Selling Pac	kages									
SMS										
SMS quota										
SMS templ	ates									

Then select + Purchase more SMS's.



When purchased these will automatically show in your account and you will be automatically invoiced. The invoice will show in your ReNet software.

SMS Sending

When sending SMS from ReNet the Send SMS area will show.

Send SMS								
Mobile number	Send bulk SMS to 21 people! Optional: add another Mobile Number							
Send From	Varelle Johnson SMS Gateway De 😒 🗌 Send from the primary contact manager where possible							
Message S View placeholders	Select a template to use							
	Send							

Mobile Number: This will show the number contacts you are sending to, or the mobile number of the single contact. You also have the ability to add 1 additional phone number to send to.

Send From: This will show where you are sending the message from. You also have two options from which number the SMS will send from.





SMS Gateway Default: When sending via the Gateway Default phone number, this is a number that the contact will not recognise. Any replies to the SMS will be automatically logged back into ReNet.

Your Mobile Number: When sending via your mobile number, if this is saved by the contact it will display as being sent by you. Any replies will be sent directly back to your mobile phone.

The standard size of an SMS is 160 characters. If you go over 160 characters you will use more SMS credits.

If you would like to setup your own templates, select the + Setup SMS Templates button.

+ Setup Sms Templates

Sending from a contact search

From any contact search you have the ability to send an SMS.

Send SMS

When selecting Send SMS you will see this will populate your contact into a list view.

Sele	elect All or None Contacts selected for a bulk eBrochure				
1		Varelle	Exclusive		
2		Jodi	Exclusive		
3		Robyn Parish	Exclusive		
4		Alex	Exclusive		
5		Varelle	Exclusive		
6		David	Exclusive		
7		Mark Stephens	Exclusive		
8		Tom	Exclusive		
9		Emily Mitchell	Exclusive		
10		Helen	Exclusive		

From the bottom of this area select Build SMS to send.

Enter you SMS into the **message** field.

When ready select Send.





Sending from a Contact Card

From the contact information at the top, you will see the ability to send an SMS from the phones area.

Managed by	Varelle Johnson				
Categories	BUYER,				
Phones	ł 🔚				
Emails					
Last Modified	Thu 8th Jun 2017 @ 10:18	am			

You will then see the send SMS Screen.

Enter you SMS into the **message** field.

When ready select Send.

Sending from the Task Manager

Through our task manager you also have the ability to bulk communicate. From the smart search in ReNet select the **Tasks** link and you will see some filters appear for you:



From the ALL Activities area select the activity of brochure or SMS. This will then populate the list of people who have this type of activity to be completed.

From here select Send Bulk SMS or Send Bulk eMail to populate your contacts into a list.

Select the people you would like to send to, and then send your correspondence.

Once this has been sent, all of the tasks will be automatically marked as done.





Tasks & Trails

Single Task/Reminder

From the main activities within the system, you have the ability to set single recurring tasks. These can be set for:

Adding a new contact into the system Adding an open home attendee Adding an inspection attendee Adding an offer Adding contact or property notes Adding a market appraisal Directly against a listing Directly against a contact

Set a task or reminder for this activity						
Task Staff	••• Me •• 🗘 Task Due Task Date					
Task Activity	Phone Call Email Brochure Letter PDF SMS Other					
Task Repitition	No Repitition Daily Weekly Monthly Yearly					
Task Priority	Normal Priority High Priority Low Priority					

Task Staff: This is the staff member who is going to complete the task and the date you would like the task to start.

Task Activity: The type of activity that will be completed for the task.

Task Repetition: How often you would like this to repeat.

Task Priority: This will filter the tasks and show high priority tasks at the top of the screen.

You are also able to set single tasks/reminders in direct relation to a property or a contact. To set these select the **tasks** tab on the listing or contact and then select **+Single Task/Reminder.**

	Tasks
+ Single Task/Reminder + Set of Tasks/Trails/Reminders	
All Due & Compli 😌 All Trails & Remit 😨 ALL Activities 😮 Ordered by Priority 😮	
There are no tasks due or over due for 05-07-2017	

In addition to the normal options, you will see the ability to add the task description.

Task Description	Enter task description]
]





Tasks/Trails/Reminders

From a listing or a contact, you have the ability to set trail, which is a group of tasks to be completed by various staff members and each task may have a different due date.

To start this, you need to create a template of tasks, which will remain in ReNet and you are able to edit this template at any time. If you do update the template, this will not update any existing tasks that have been set, it will only be new trails that you assign.

If you are logged in via salesrep admin go to Setup and then the tasks tab.



If you are in administrator admin select the **Setup** tab and then **task manager** on the left hand side.

Home	Listings	Contacts	Office	Reports	Website	RMA Sales	Marketing	Setup	Support	
Office			1	+ Property	+ Contact	+ Enquiry + (Ofi Attendee + In	spection +	Offer + Note + App	oraisal
Touchpoints N	lanager™									
Sales Process		Touc	points Manager	TM						
Default Locations										
Document ten	nplates	Touc	points Manager	Enquiries	Inspections	OFI Attendees	Offers Appraisa	Is My Activ	ities Owner Reports	
Task Manager	r		Contact Type	ALL Cont	acts ᅌ 🕂	All Temperatures -	-			
Fields for Listi	ngs	C	ontact Categories	Are in	Any Catego	ory 📀 📀	And are in 📀	Any Cate	egory 📀 📀	
Contacts Cate	egories	Tau	ha cinto Monoros							
		Touc	npoints Manager	Has Crite	ria 🗌 Market A	Appraisal 🗌 Offere	ed Inspected	OFI Attended	 Issued Contract (Sh 	ow Emailed)

To create your trail select + New set of Tasks or Trails.



Trail name		
Owner	Office 📀	

Add the trail name and select the owner of the trail. Select Save.

Once the new screen comes up select + Task/Items.

You will see the normal task add page with the ability to add your recurring tasks items.





Editing your trail

From the task setup area select the **Edit** button on your trail name.

You will then see all of the tasks that are set to this trail and you will have the option to edit on the right hand side.

Duplicating Trails

From the setup area, you also have the ability to duplicate your trails. This will copy all of the tasks setup within this trail, that you can then modify and change if needed.

When going into the setup area you will see the option to **duplicate** your trail.



+ New set of Tasks or Trails						
Trail/Task/Activity	Owner					
1. ANDREW	Office	Hide	Duplicate	Edit		
2. ANNIVERSARY TRAIL	Office	Hide	Duplicate	Edit		

Assigning your Trail

To assign your trail go to the tasks tab against your contact or your property and select + **Set** of Tasks/Trails/Reminders.

		Tasks
+ Single Task/Reminder + Set of Tasks/Trails/Reminders		
		Manage Tasks and Trails
Trail/Task/Activity	Owner	Assign
1. ANDREW	Office	Assign 4 Items
2. ANNIVERSARY TRAIL	Office	Assign 7 Items

Select the Assign button for the required trail.

This will then show all of the tasks that you have within the trail.

#	Staff	Description and select start date 05-07-2017
1.	Varelle Johnson	Do a Normal priority "Email": Weekly Email Begins 07-07-2017
2.	Varelle Johnson	☑ Do a Normal priority "Phone Call": Friday Follow up Begins 10-07-2017
3.	Varelle Johnson	Do a Normal priority "SMS": Monthly SMS Begins 15-07-2017
4.	Jace Jonathan	Do a Normal priority "Other": Last Thursday of March catch/up Begins 29-03-2018





You have the option to modify:

The staff member to complete the task The due date

How many occurrences the task will have

The start date of the trail

Where tasks will display

Once your tasks have been assigned, there is a link to access these from the smart search of ReNet.

Listings		Contacts	Staff	Support					
Search by Property ID, Price or Address									
1	3 Tasks En	quiries 1 SMS	Messages	WATCH VIDED ->	Select a Video Tutorial 📀				

This area will show all of the tasks that you have due for today and any tasks that are overdue.

13	Done	r	12 Beatrice Terrace Ascot	Due: 05-04-17 Inserted By: scott schindler Trail: Anniversary Trail Monthly Brochure - 1st of 4: ebrochure of matching properties	Edit X + Note	
----	------	---	---------------------------	--	------------------	--

Once your task has been completed, select done on the right hand side, and this will automatically remove from the list.

Through this screen you also have the ability to edit your tasks information. To adjust the date, select the due date and this will allow you to change the date this is due. You will then receive a new reminder on the new date.

By selecting the edit button you are able to assign this to a different staff member and change the description.

By selecting the +Note option, you are able to add notes to your task for history.

You will also receive an email every morning from ReNet with your daily tasks.



Hi Varelle Johnson

Find below 13 of 13 due tasks and activities assigned to you.





Documents

Within ReNet, you have the ability to set letter templates and create one to one letters.

Creating your letter

To access the mergefields for your letter, if you are logged in via salesrep admin go to **Setup** and then **Documents**.



If you are logged in via administrator admin go to Setup and then Document templates.

Home Listings	Contacts Office Reports Website RMA Sales Marketing Setup Support
Office	+ Property + Contact + Enquiry + Off Attendee + Inspection + Offer + Note + Appraisal
Touchpoints Manager™	
Sales Process	Add a document template
Default Locations	
Document templates	U Files must be in RTF format and no larger than 8 megabytes.
Task Manager	Document name
Fields for Listings	
Contacts Categories	Choose File No file chosen
Quarterly Sales Goals	Save
My Preferences	
Realestate.com.au Enquirie	

From here you will see all the merge fields available for your letters.

To create your letter open a new blank document in Microsoft Word. Copy and paste the merge fields from ReNet into your document. Once the letter is completed save this as a rich text format (RTF) File.







Uploading letters

Add a document template

I Files must be in RTF format and no larger than 8 megabytes.							
Document name							
File	Choose File No file chosen						
Save							

To upload your letters, go to the setup area:

Enter a document name Select the **Choose File** button and select the letter off your computer Select Save to upload your letter

Once this is uploaded this will show in alphabetical order.

Editing Letters

1 Cap1_1_Vendor Open O	ginal Hide Edit X

To edit your letters go to the setup area:

Select the **Open Original** button to download your original letter with the merge fields that have been entered.

Open this document in Microsoft Word and make any necessary changes. Save your new document.

From ReNet select the **Edit** button. You will see that the name of the document shows in the document name field above the uploaded letters.

Select the **Choose File** option to select the new letter from your compute.r Select **Save** to upload the new letter.

Creating Letters

÷.

To create your letter please go to any contact and then select the documents tab.

Profile Touchpo	oints Manager™	Prospecting 1 Properties	Inspections	Offers	6 Notes	Referrals	Documents	Tasks		
+ Documents/letters Setup										
Select Date Action Property										
Select & Use	Select & Use 02/06/2017 Market Appraisal				27 Aquamarine Drive TOORMINA					
Select Document Select a Document/Letter to create Show/Test Document & Mail Merge Data										
Merge, Create & Save Document										

You will see from here the different activity that your contact has completed and the ability to **Select & Use** the data.





Press the **Select & Use** button for the data you would like to use, this will pre populate into a form, showing the data that will be shown in your letter.

+ Documents/letters Setup									
Select	Date	Action		Property					
Select & Use	02/06/2017	Market Appraisal		27 Aquamarine Drive TOORMINA					
Market appraisal da	ite		02-06-2017						
Market appraisal an	nount		\$0						
Market appraisal an	nount to		\$0						
Market appraisal tal	ken by		Varelle Johnson						
Market appraisal pr	operty		27 Aquamarine Drive, TOORMINA NSW 2452						
Select Document 20) MA Training Letter Show/Test Document & Mail Merge Data									

From your Select Document drop down, select the letter that you would like to create.

Select Merge, Create & Save Document.

This will download into a Microsoft Word document.

Creating Bulk Letters

To create bulk letters, you are required to downloaded your contacts into an excel spreadsheet that you then use as the mail merge source in Microsoft Word.

From any main contact search you will see the ability to **Mail Merge.**

Mail Merge

This will download your contacts into an excel spreadsheet.

From Microsoft Word use the mail merge wizard to add this spreadsheet as the data source for your document.

You will then use the Microsoft Word mail merge functions to create your letter.





Campaign Manager

To access the campaign manager, from your listing go to the **campaign manager** tab or **+ Expense.**

+ Enqu	ilry 🚺 + Medi	ia (+ C	OFI Attendee	+ Inspection + Ex	pense] +	Offer + Note +	- Contract + Tas	sk	
Owners: 🤽									
Authority: Exclusive Listing: by Varelle Johnson on May 08 17 Expiry: 05-08-17 Live: 63 Days on market since agreement date & 54 Days on market since live 16-05-2017. Status: Current Current									
Profile 32 Touchpoints M	anager™ 17	Notes	Prospecting	Campaign Manager	Brochure	Owner Reporting	1 Sales Process	Tasks	
Campaign Expenses Can	npaign Propo	sals							

Through this area you have the ability to create:

Campaign Proposal: This is created through the market appraisal stage to show how you are going to market the property. You will then convert this to a current campaign once this has been approved.

Campaign Expense: This is a current campaign with active marketing for the property. You are able to invoice from this area for vendor paid advertising and also mark off payments for marketing items.

Single Campaign Item

+ Add New Campaign Item

You have the ability to add single campaign items or create a template to add a group of items.

To add a single campaign item select + Add New Campaign Item.

Expenses	
Expenses	
Campaign Name	New Campaign Name
Date	10-07-201 or add as a D Proposed expense occuring on week number 1
Paid by the	O Vendor O Agency On Settlement C + Payment Methods
Categories	Please Select Image: Categories Please Select Image: Categories Please Select Image: Categories
Select Saved Item	Select a category to see your saved expenses. [Setup]
Costs	Invoiceable Cost Value/Cos (Inc GST) Actual Cost Actual Valu (Inc GST)
Description	
Add as Saved Expense	No Yes





Campaign Name: The name of your campaign.

Date: This is the date that the marketing item is going to occur.

Paid by the: Vendor/Agency and when this is going to occur. You are able to add your own custom payment methods by going to **+ Payment Methods.**

Categories: There are two types of categories:

Main Categories - These are the main areas where you will be advertising your listings. Eg. Internet, Signboards, Newspaper. You are able to add your own by going to **+ Advertising Categories**

Sub Categories - These are the companies where you will be advertising. Eg, realestate.com.au, domain.com.au, signboard companies and printing companies you may use. You are able to add your own by selecting + Advertising Sub Categories

Select Saved Item: If you have saved item you are able to select these from the drop down.

If you are using this area for the first time, please add the details for the item and you are then able to add this as a saved expense.

Costs:

Invoiceable Cost - What they will be paying through your company. Actual Cost - What they could pay through another company.

Description: What the marketing item is.

Add as a saved expense: If you select 'yes' on this, this will save in the system so you can use it again.

Once this saves you will see this add to your marketing area.

St	Standard											
1	10-07-2017	Newspaper	1/4 pag	age ad colour VPA On Settlement + Invo			voice	\$50.00	\$50.00	Edit		
								\$50.00	\$50.00			
Su	Summary											
			1	Total Marketing \$				50				
2				VPA				50				
			3	Marketing Items				1				
Pa	Payments Learn About Payments											





Creating Campaign Templates

To create a campaign template select + Add From Campaign Template and then select +Add Expense From A Saved Campaign Template.

Select Add New Campaign template and create a name.

Once this has been saved select +add new saved expense.

Saved Expens	es for this Template + Add a new Saved Expense
Categories	Please Select Categories
	Please Select
Occurance	Occuring on week 1 Select a category to see your saved expenses. + Saved Expenses

From your categories and sub category select your area and company and then the saved expenses will appear.

Select your saved expense and then select save.

Once you have all of these added to a group you are then able to assign the group of campaign items to your listing.

Editing saved expenses

To edit your saved expenses select + Add From Campaign Template and then select +Add Expense From A Saved Campaign Template.

From your marketing campaign select **Edit** on the right hand side.



This will show all of your single saved expenses.

drop flyer	\$440.00 \$4	\$440.00	Advocate Article x 4	Advocates	DL Letter box drop fiver	Edit Delete
------------	--------------	----------	----------------------	-----------	-----------------------------	-------------

From your saved item, select **edit** on the right hand side. This will only update for future campaign items that you assign.





Assigning campaign templates

From your Campaign Manager select + Add From Campaign Template.

+ Add From Campaign Template

From here you will see all of your campaigns that have been saved.

1/3 advert: 7 items costing \$3,155.00	Select Campaign Template
1000 campaign: 9 items costing \$6,260.00	Select Campaign Template

For the campaign that you would like to use select **Select Campaign Template.**

This will show all of your items and allow you the ability to edit these before you set this to your property.

Campaign Name	Auction Campaign	
Campaign Due	On Settlement S + Payment Methods	
Item 1	Full Page In Paper: \$500.00 Magazine scotts paper Occuring on 10-07-201 Image: Office Paid	Confirm
Item 2	Half Pager In Paper: \$250.00 Newspaper advocate Occuring on 10-07-201 Overdor Paid Office Paid	Confirm

You are able to edit:

The campaign name When the payment is due The item start date If the items are to be included in the campaign If these are vendor or office paid

After all adjustments are made, select **Save** and this will assign your campaign items.

Converting a Proposal to a Current Campaign

If you are creating a proposal campaign first, you are able to convert this to a current campaign with the same campaign items.

From your proposal tab, after you have setup your campaign items, select **Confirm or Delete Proposal** beside your campaign name.

A	ucti	Confirm or	Delete Proposal				
1	1	Newspaper	half pager in paper	VPA On Settlement	\$250.00	\$250.00	Edit
2	1	Magazine	full page in paper	VPA On Settlement	\$500.00	\$500.00	Edit
					\$750.00	\$750.00	





Campaign Name	Auction Campaign	
Campaign Due	On Settlement C + Payment Methods	
Item 1	Full Page In Paper: \$500.00 Magazine scotts paper Occuring on 10-07-201 Image: State of the sta	🗹 Confirm
Item 2	Half Pager In Paper: \$250.00 Newspaper advocate Occuring on 10-07-201 S Vendor Paid Office Paid	🗹 Confirm

You are able to edit:

The Campaign name When the payment is due The item start date If the items are to be included in the campaign If these are vendor or office paid

Once this has been saved, this will be removed from the campaign proposal area and will be converted to a current campaign.

Invoicing your campaign items

Once you have a current campaign running you are able to invoice for these items.

S	Standard										
1	10-07-2017	Newspaper	1/4 page ad colour	VPA On Settlement	+ Invoice	\$50.00	\$50.00	Edit			
						\$50.00	\$50.00				

From your campaign item select + Invoice + Invoice

From here select the items to be included in the invoice and add an invoice number. Select **Save.**

From the main screen, this will now show an invoice number beside your campaign item.

St	Standard									
1	10-07-2017	Newspaper	1/4 page ad colour	VPA On Settlement	Inv# 123479	\$50.00	\$50.00	Edit		
						\$50.00	\$50.00			





To create the invoice select the invoice number.

_	3 [37301915] Andree Cardow (Owner)										
(3	0 [30604695] Luke 2 (Owner)										
(36349105) Varelle (Owner)											
Varelle Johnson (Listing Agent)											
O Do not attached invoice to anyone											
33)	ReNet Invoice T	emplate	Invoice/document								
Saved items for this invoice											
Save											
save #	Date	Description	Amount	GST	Total	Edit					
# 1	Date 10-07-2017	Description Newspaper : 1/4 page ad colour	Amount \$45.45	GST \$4.55	Total \$50.00	Edit					

This will show the options for:

Who the invoice will be created for

Which template you would like to use. We have provided a default template for you to use.

Select Create & Save Invoice and this will download directly into Microsoft Word.

This will also log a record of the invoice directly against the contact under the documents tab.

Marking Campaign Payments

Once you have started to send your invoices, you are able to start marking off payments for your campaign items.

From your campaign expenses tab select + Add Payment + Add Payment

① Total outstanding	Total outstanding balance = \$50.00						
Payment For	General Payment OR select item						
Paid Amount	\$ on 10-07-201 Paid by the S Vendor or the Agency						
Payment Note							

It will show you the total outstanding balance of all campaign items.

Payment for: You are able to make a general payment which will be taken off the balance or take this off one of the saved expenses.

Paid Amount: How much has been paid and who has paid this.

Payment Notes: Any additional information.





Once saved, this will then show a running total at the bottom of your campaign area.

Pa	Payments Learn About Payments											
#	Date	Category	Sub Categ	gory Des	cription	Notes	Paid By F	Payment				
1	10-07-2017	Newspaper	advocate	1/4 p	age ad colour	-	Vendor	\$25.00 E	dit X			
								\$25.00				
Ba	Balance Sheets Learn About Balance Sheets											
#	Aç	gency Due	Vendor Due	Total Due	Agency Payments	Vendor Paymer	ts Total Payme	ents B	alance Due			
1			\$50.00	\$50.00		\$25.	00 \$2	5.00	\$-25.00			