Touchpoints Manager Guide

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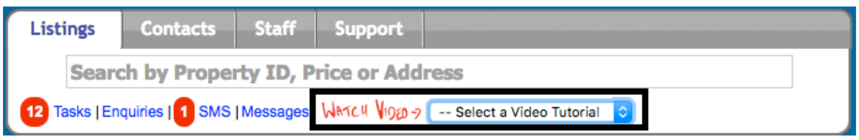
Summary

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:

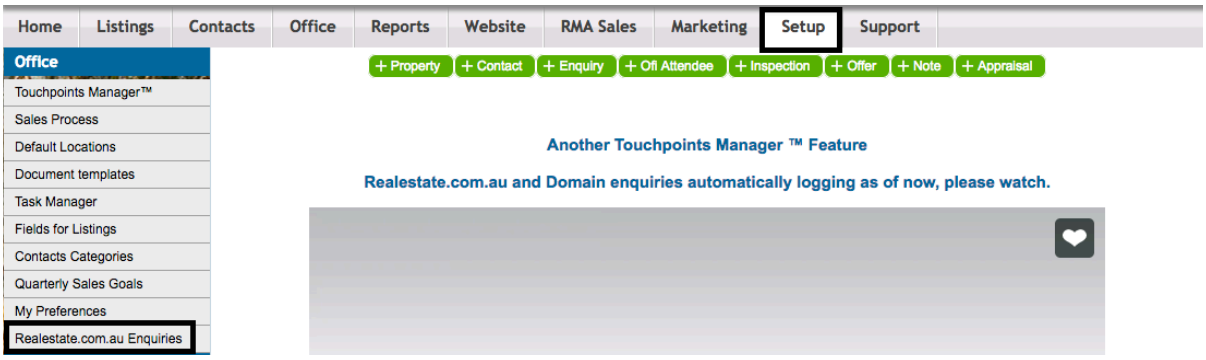
Your ReNet powered website
Our ReNet portals
Domain.com.au
Realestate.com.au – If you are not automatically receiving realestate.com.au enquiries please follow the steps to set this up.

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.



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.

Select **save.**

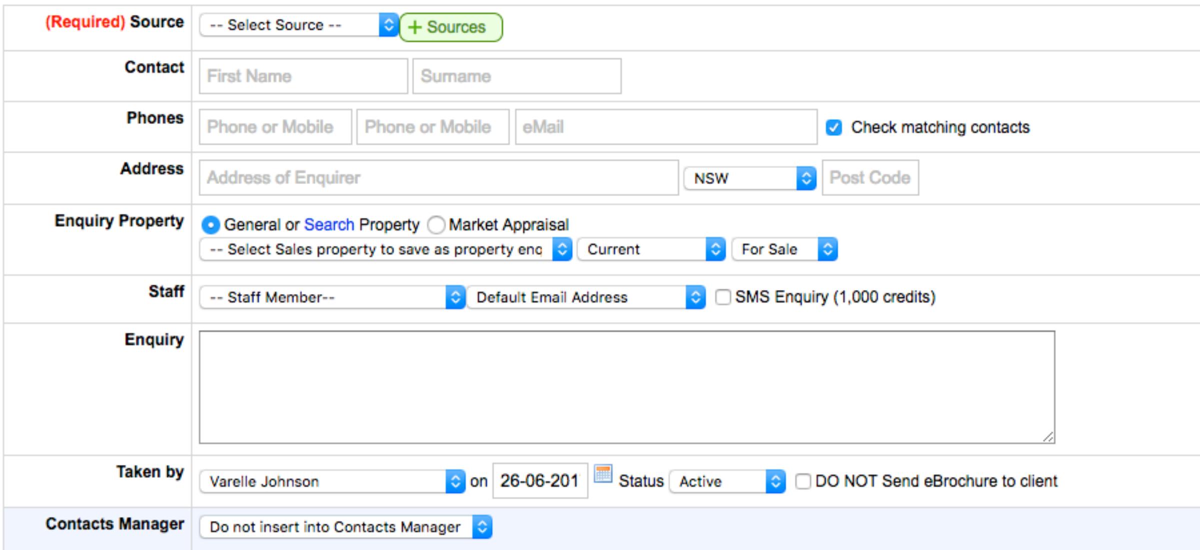
Once this has been completed for each staff member, enquiries will automatically start populating directly into ReNet.

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

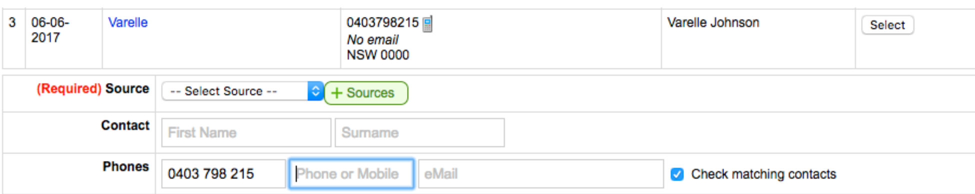
From any area where you add an enquiry you will see the below form:



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.



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.

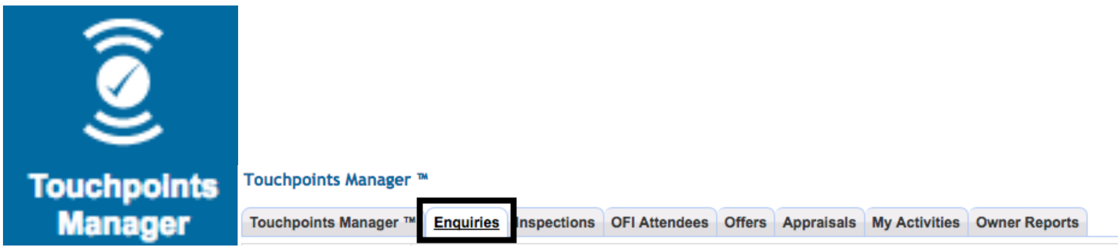
Where Enquiries Show

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

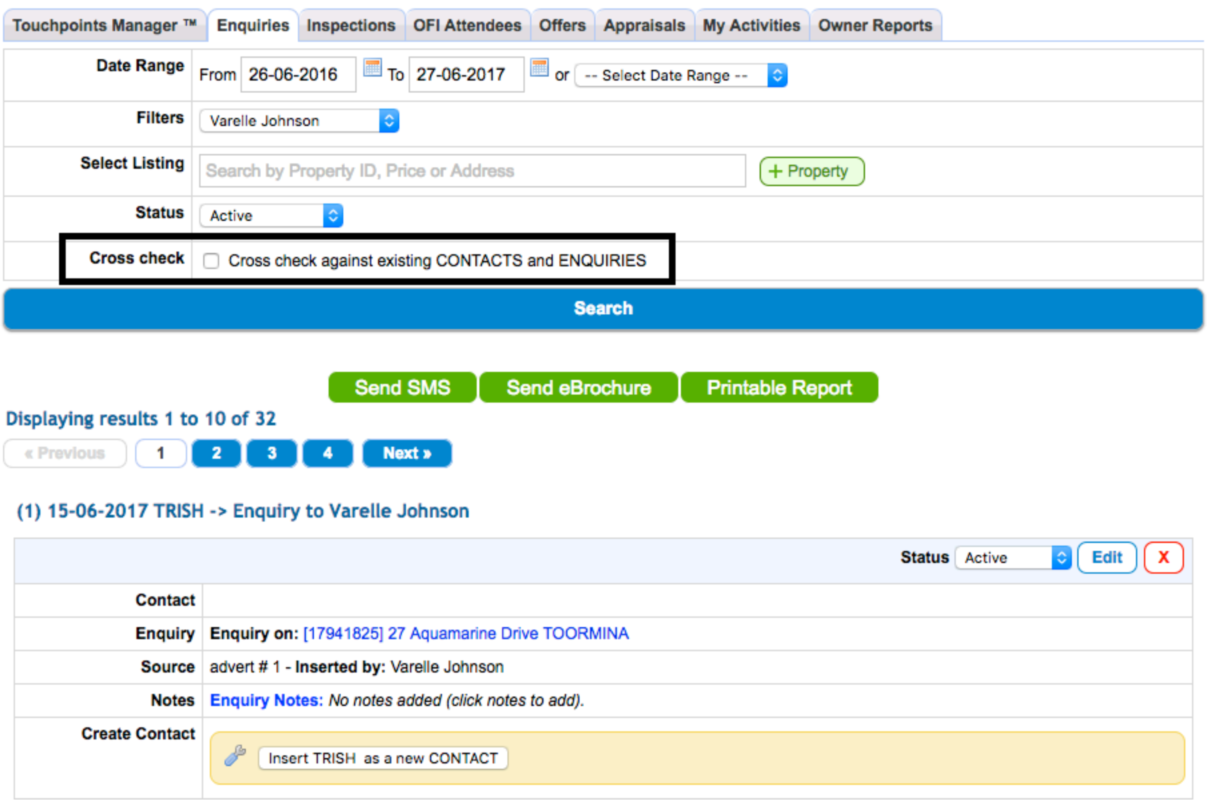
- In your Touchpoints Manager
- Directly against a listing
- Directly in contact chronological history if they are a contact in the database
    - This is based on unique criteria of a phone number or email address that has been supplied for the enquiry.

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.



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.

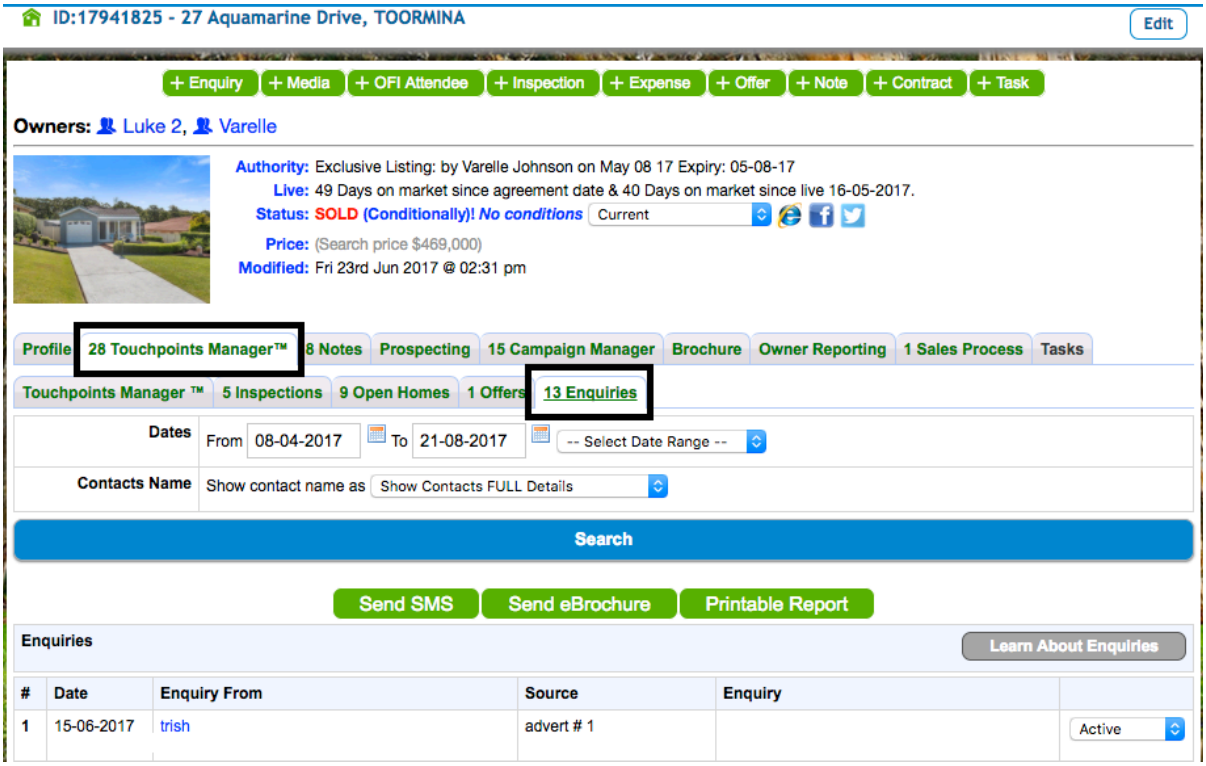
If this person is already a contact in the database, a link to the contact will be shown and the enquiry will automatically log in the contact chronological history.

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

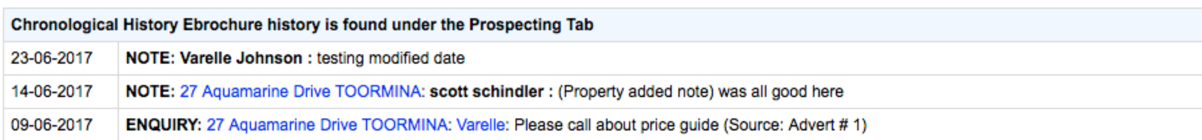
From a property select the **Touchpoints Manager** tab and then **enquiries.**



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)

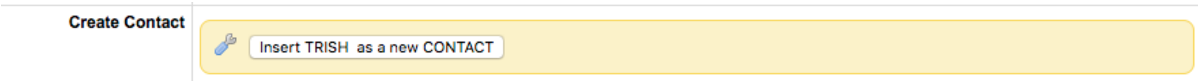
All of the enquiries will show directly in the chronological history for a contact.

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.

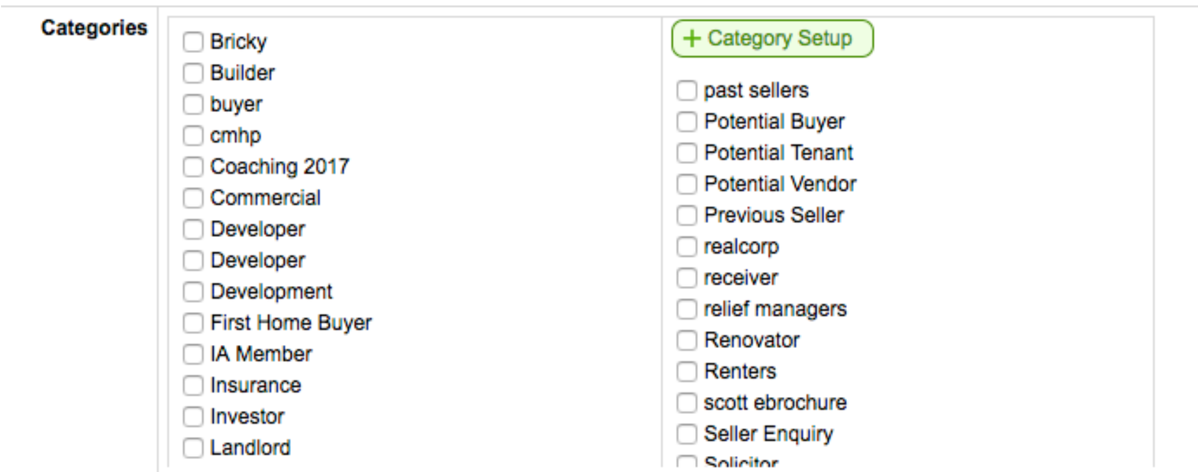


When you select the option to **Insert**, this will open a new contact card.

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.



To manage your contact categories select **+ Category Setup.**

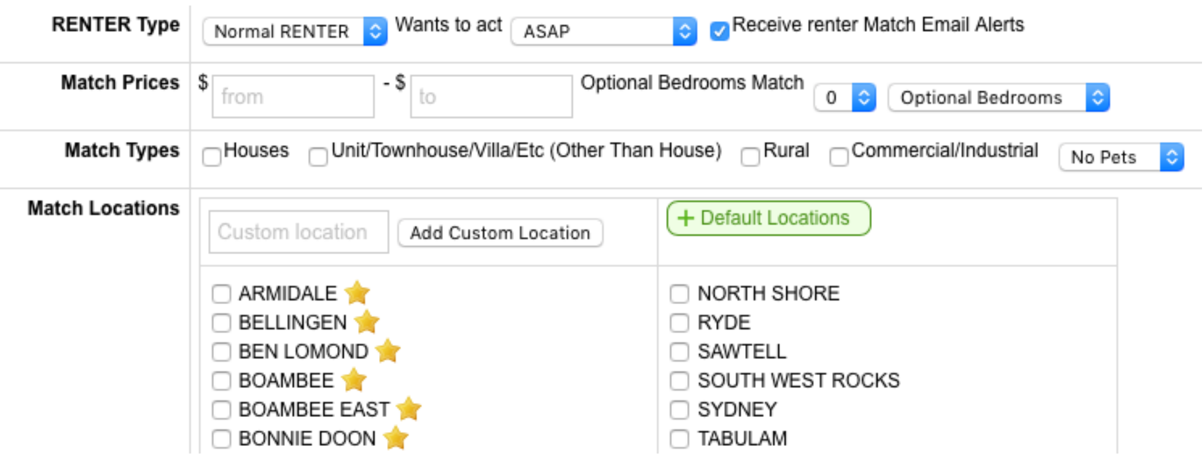
The staff member to manage the contact will automatically be selected based on the staff member who is logged into the system. You are able to select more than one staff member if required. You are then able to drag and drop in order of preference.

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.**



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.

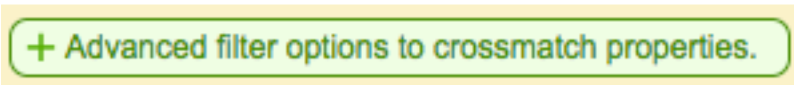
Match Locations: This is where the contact is interested in purchasing or renting.

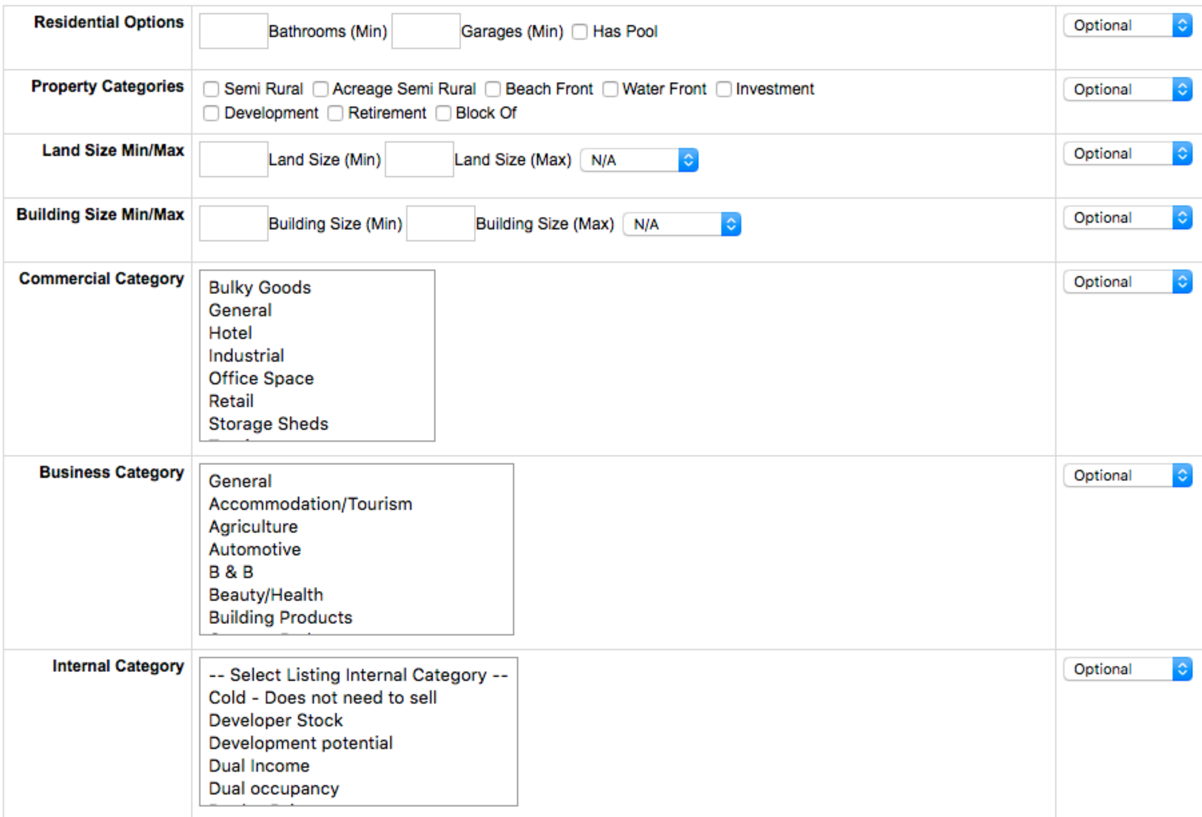
Did you know that you are able to setup favourite locations for buyer requirements? If you are an agent that works in a particular area select ***+ Default Locations*** *and set your locations to be a favourite. When assigning the buyer and renter requirements these locations will be automatically selected.*

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**.

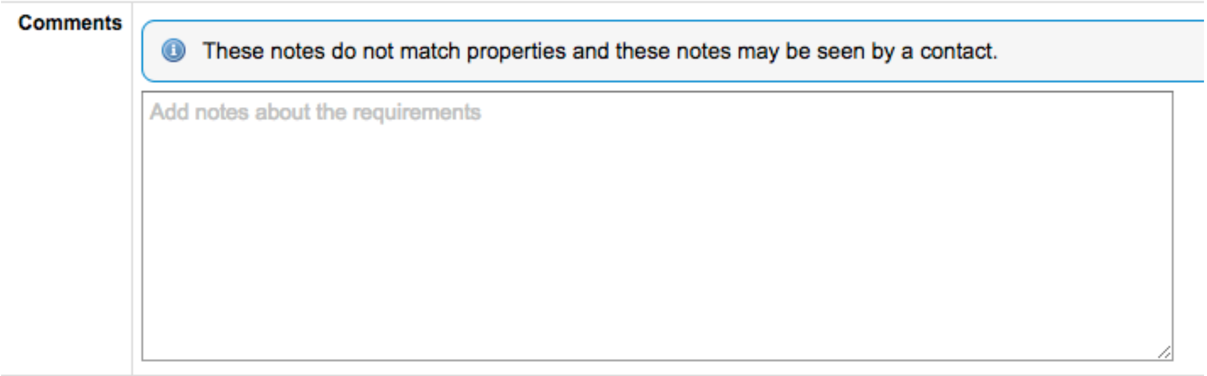




To have the advanced criteria match the listing alerts, the drop down on the right-hand side must be set to **required**.

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

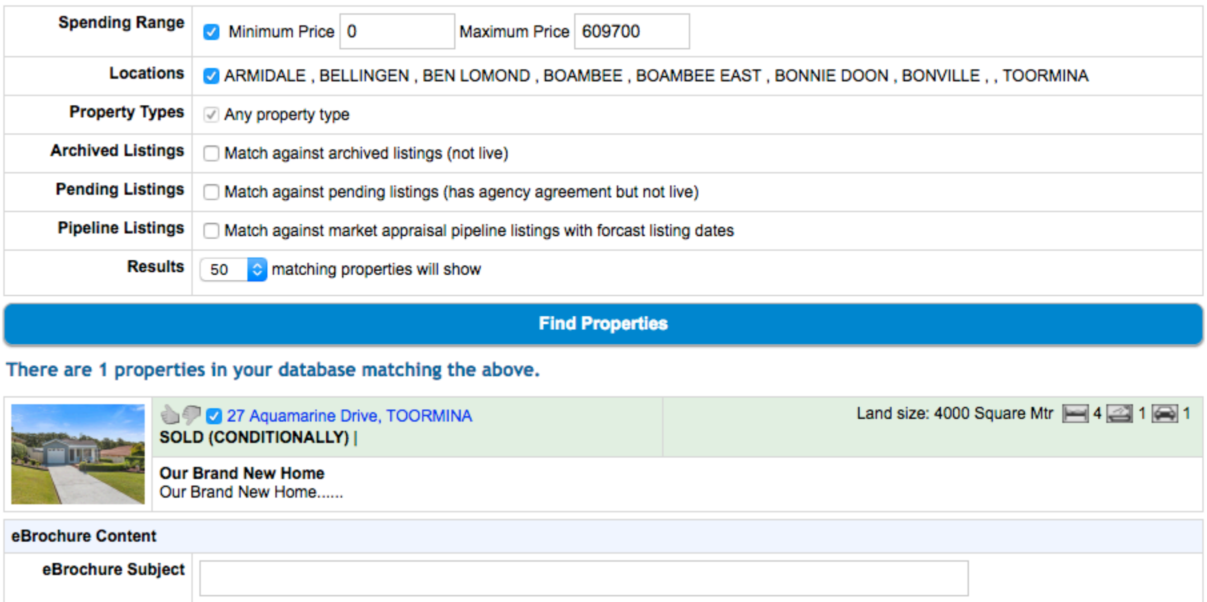


Comments	These notes do not match properties and these notes may be seen by a contact.
	Add notes about the requirements

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	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	Match against pending listings (has agency agreement but not live)
Pipeline Listings	Match against market appraisal pipeline listings with forcast listing dates
Results	50 matching properties will show

Find Properties

There are 1 properties in your database matching the above.

27 Aquamarine Drive, TOORMINA
SOLD (CONDITIONALLY) |
Land size: 4000 Square Mtr 4 1 1
Our Brand New Home
Our Brand New Home......

eBrochure Content
eBrochure Subject

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:

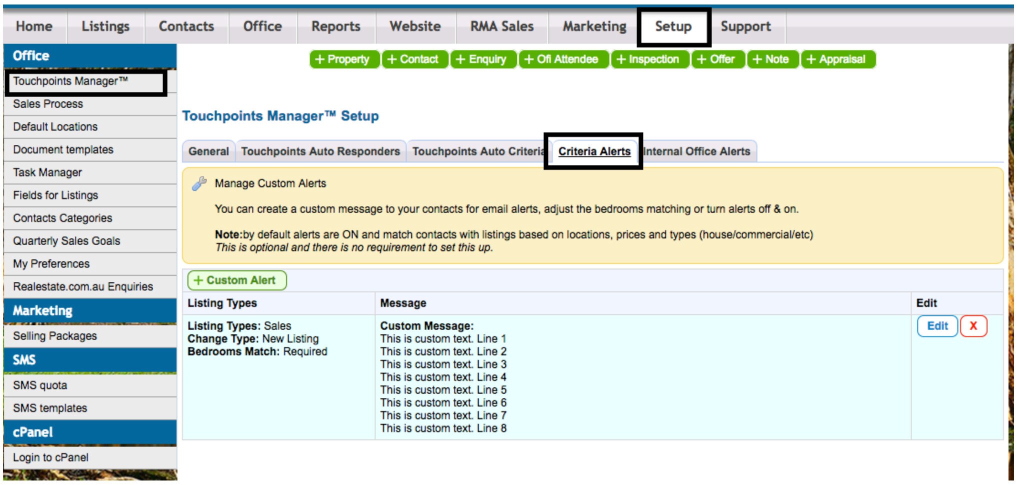
For Sale Alerts
- New Listing
- Price Reduction – Of more than $5000
  - This is triggered from the price required field
- Sold properties
- The day before an auction

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

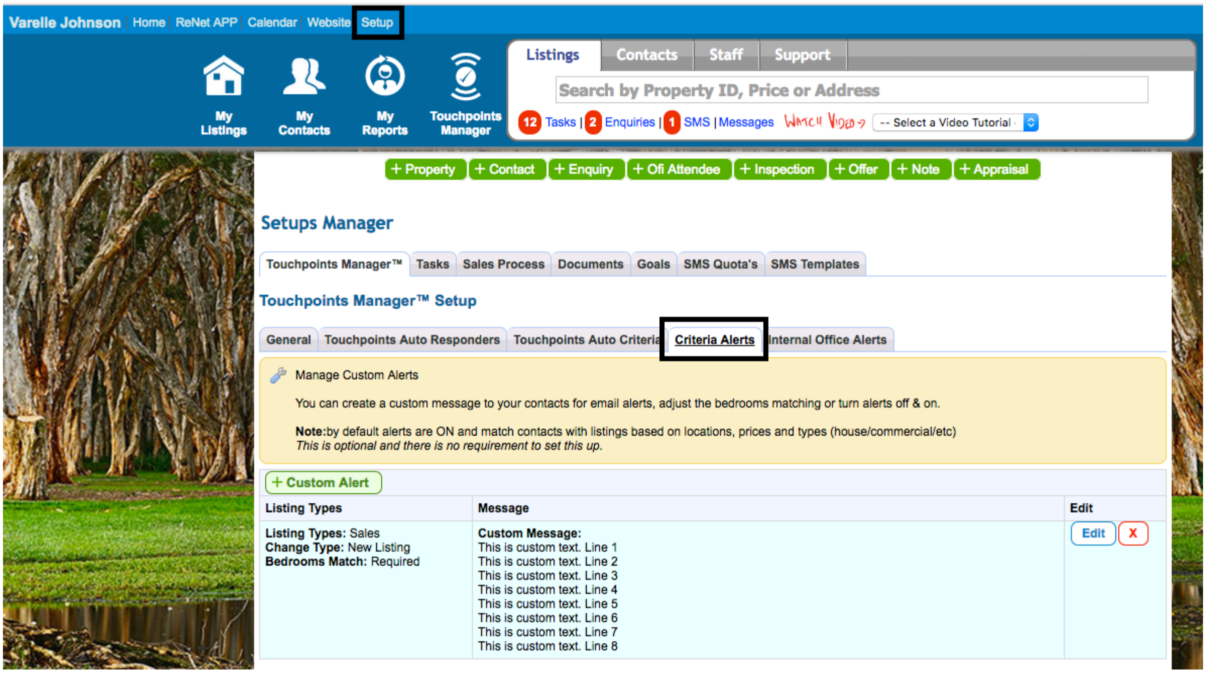
Through the setup area you have the ability to customise and manage the alerts that you send to your contact database.

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



Select the **Criteria Alerts** tab.

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



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** + 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 likes property	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.

Touchpoints Manager ™ | Buyer Requirements | Renter Requirements | Unfollowed

Mark All Activities as Completed	Offered	Inspected	OFI'd	Emailed
27 Aquamarine Drive, TOORMINA likes property				
27-29 Greenwood Close, BUDERIM likes property				

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......

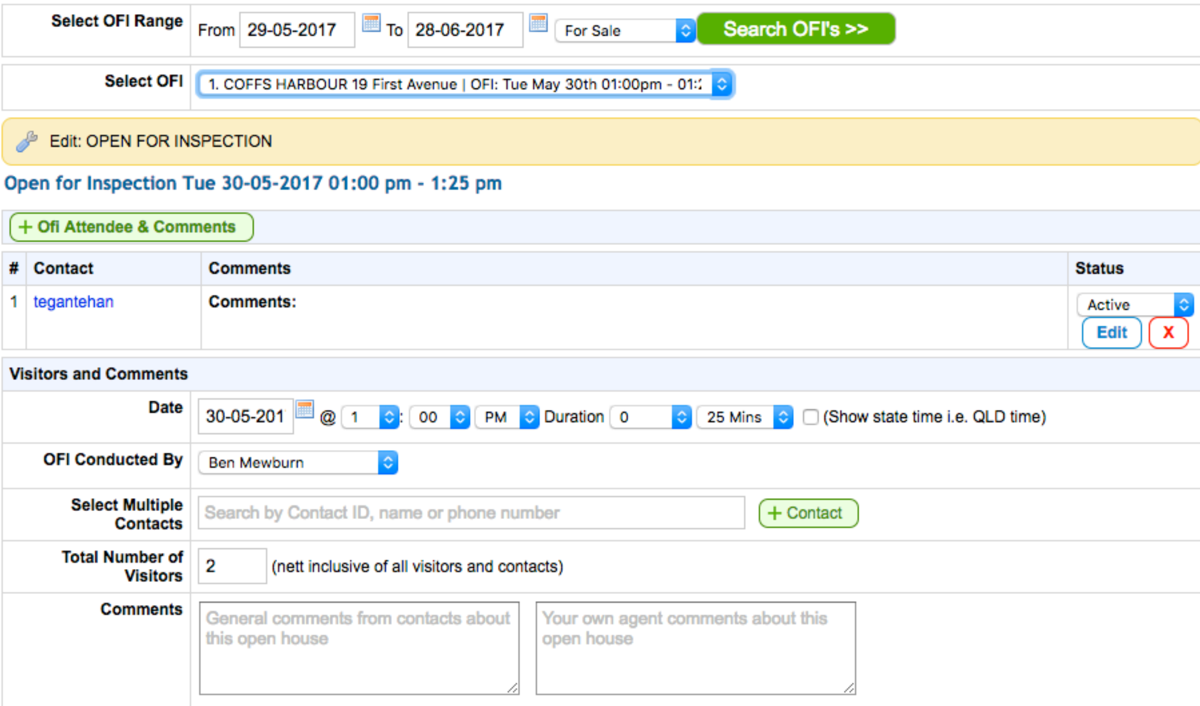
Adding Open Home Attendees

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 

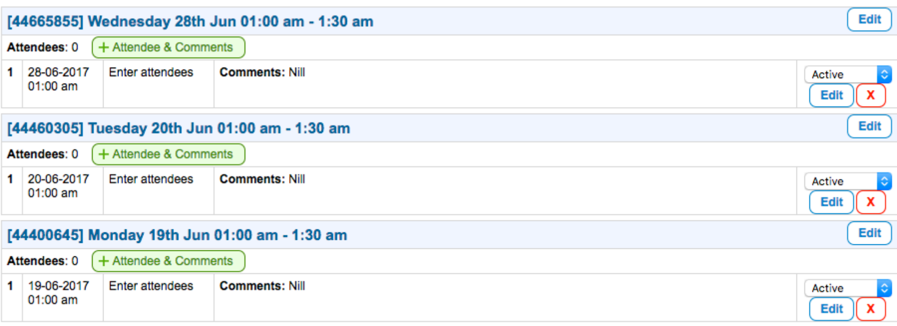
If you are selecting this from the main screen of ReNet or a contact, the form will look like:



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:

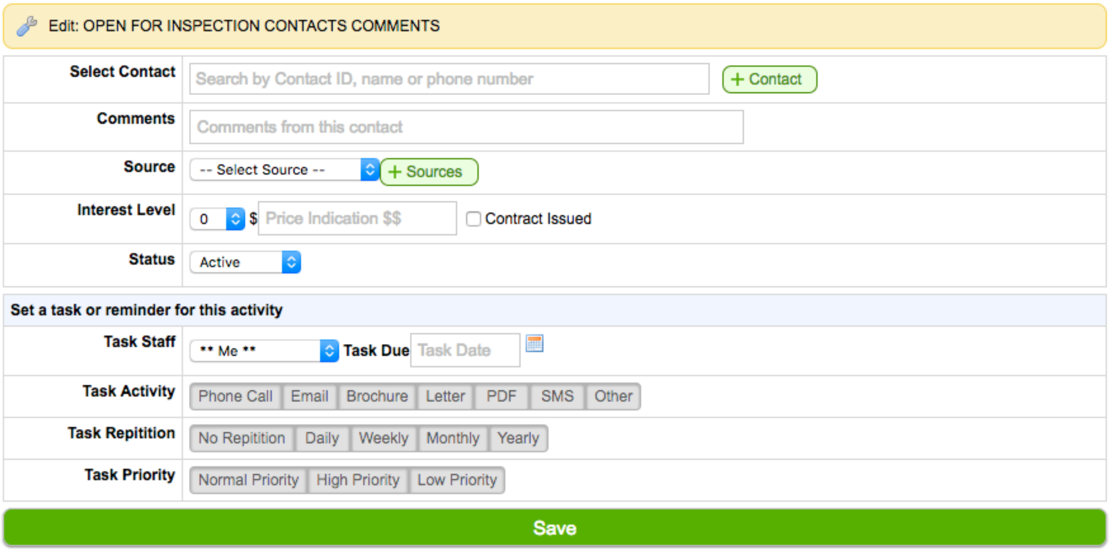


To add single contact select **+ Attendee & Comments** 

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**



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.

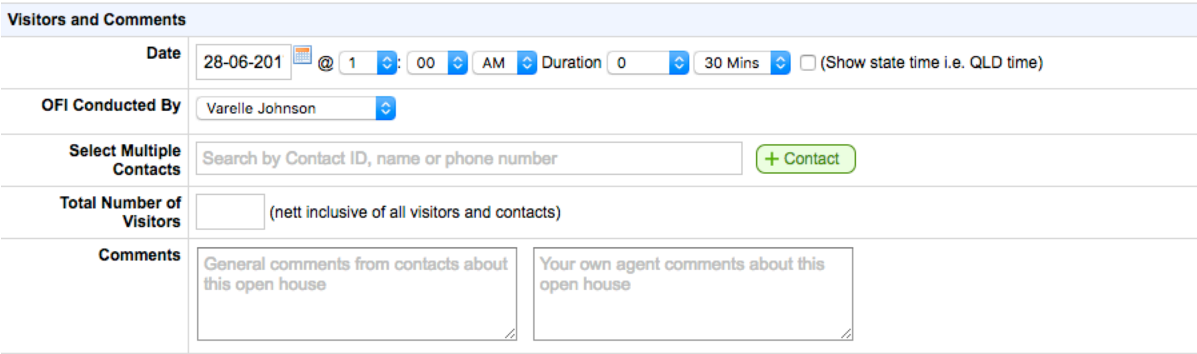
Interest Level: The contacts interest level in the property.

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



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:

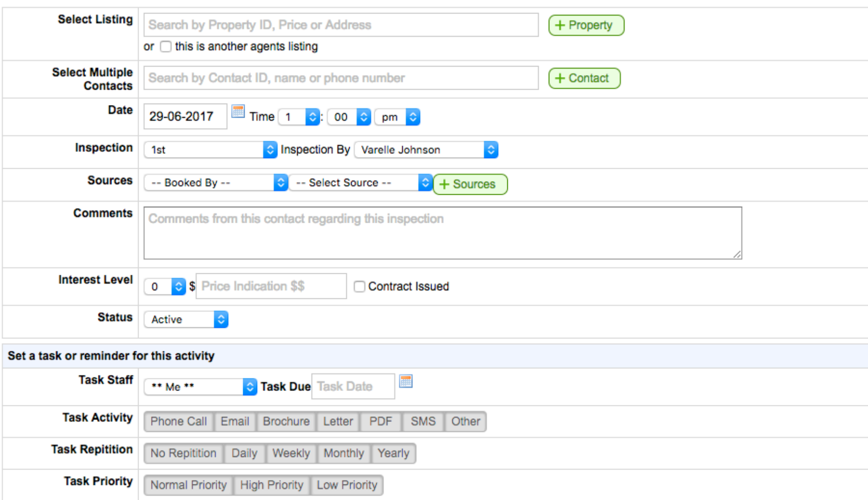
General Comments: General comments attendees made about the house.
Agent Comments: How the agent felt the open home went.

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



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.

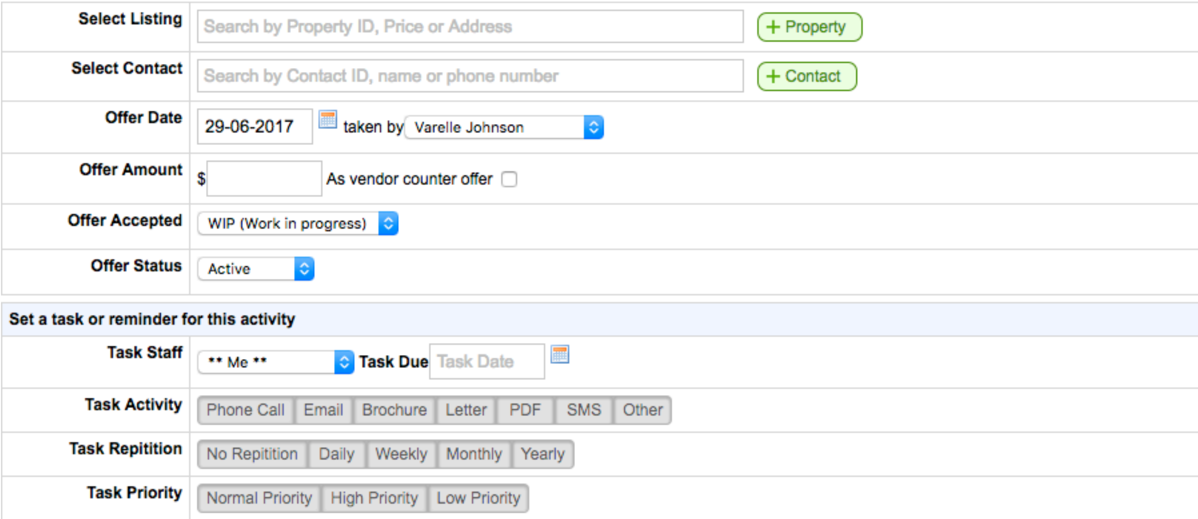
Set a Task: You have the ability to set a reoccurring task reminder in relation to the inspection you are entering.

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: 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

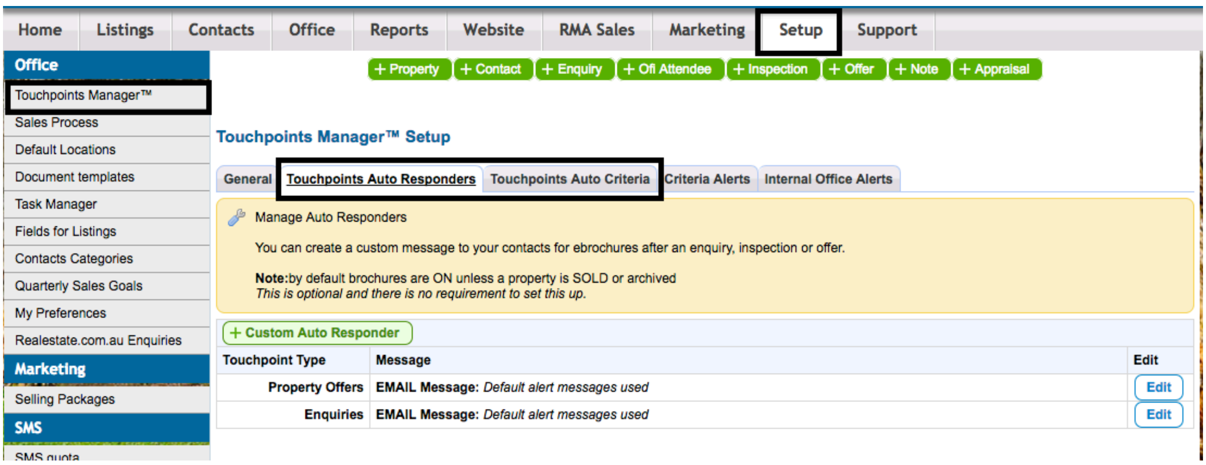
If they do not have buyer requirements added, we will automatically add buyer criteria based on the property that they have shown interest in.

Buyer Auto Criteria and Alerts

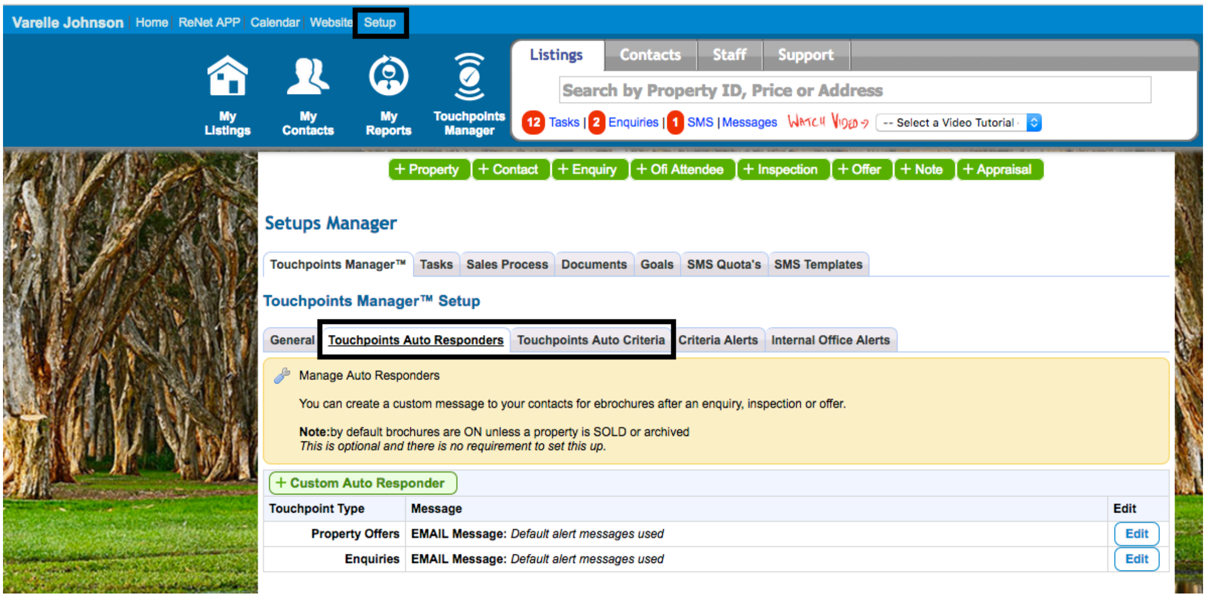
Through the setup area, you have the ability to customise:

- 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.



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

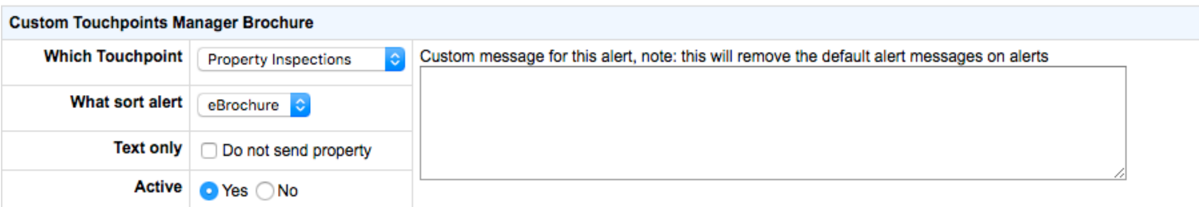


Touchpoints Auto Responders: To customise the activity emails that are sent to your contacts.

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.



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.

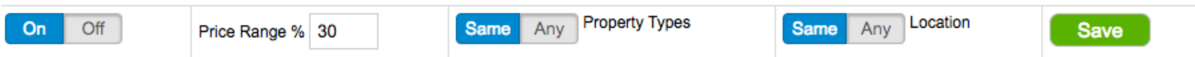
Active: You have the ability to turn the alert on or off.

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.



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

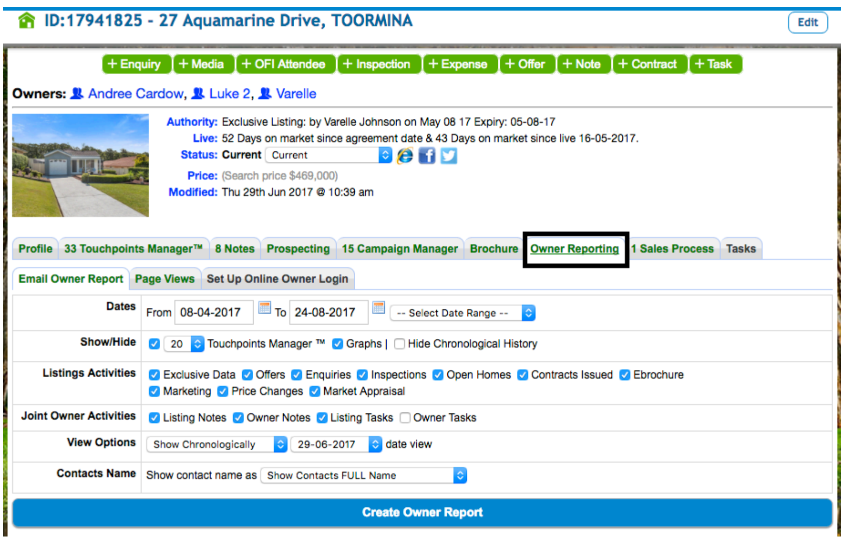
Electronic Vendor Report

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.

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



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.

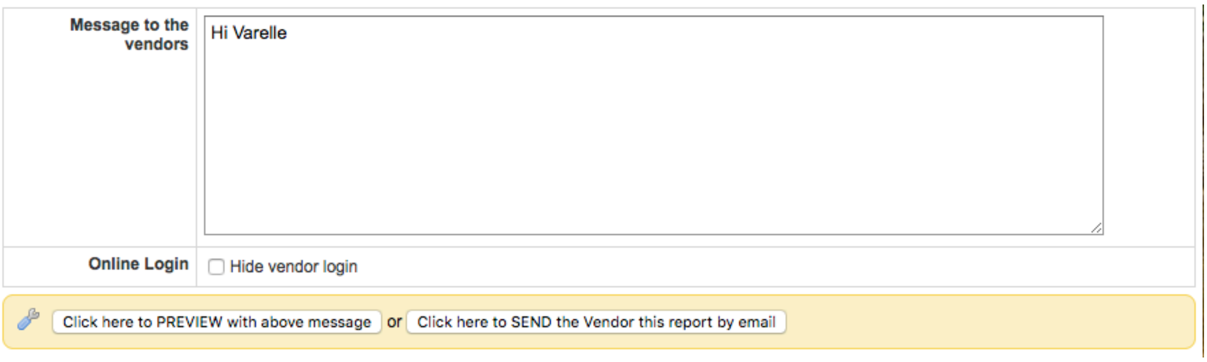
Once you have filtered your report, select **Create Owner Report.** This will populate your report into an electronic view.

Click here to PREVIEW then EMAIL the Vendor this report

Chronological 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.



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

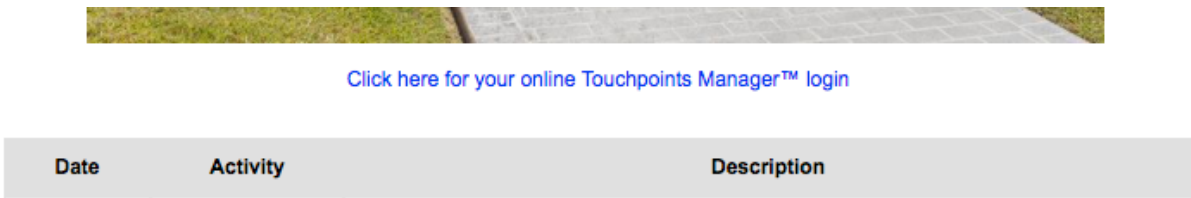
When you are ready to send select **Click here to SEND the Vendor this report by email**.

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

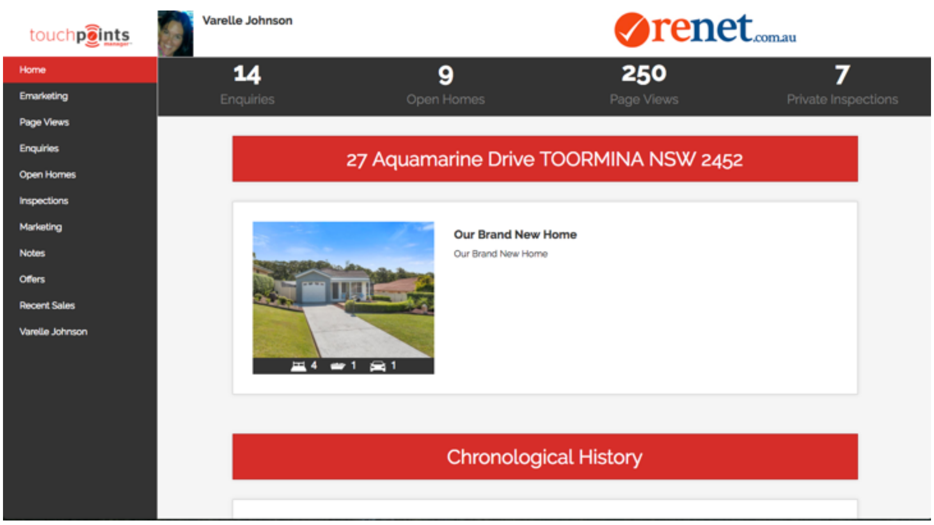
Touchpoints Manager Online Login

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.**



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



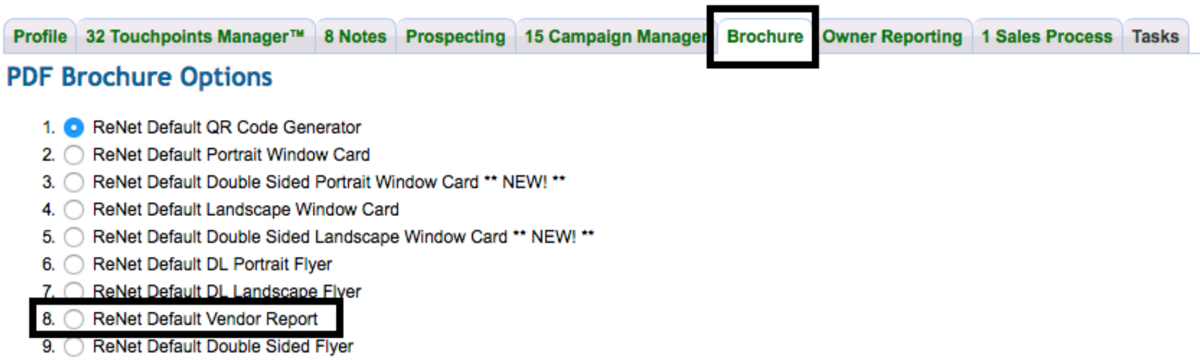
By default we will hide all contact information. The left hand side navigation will lead through to the filters that you have selected in the owner report tab.

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.**

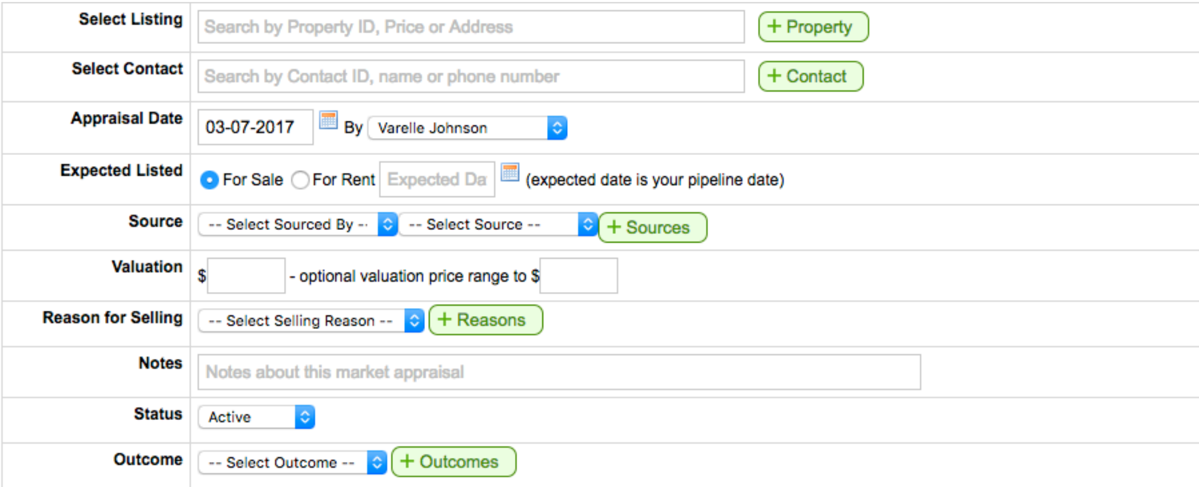
Select your date range for the report and enter any additional information that you would like to include.

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

Adding Market Appraisals

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: 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:

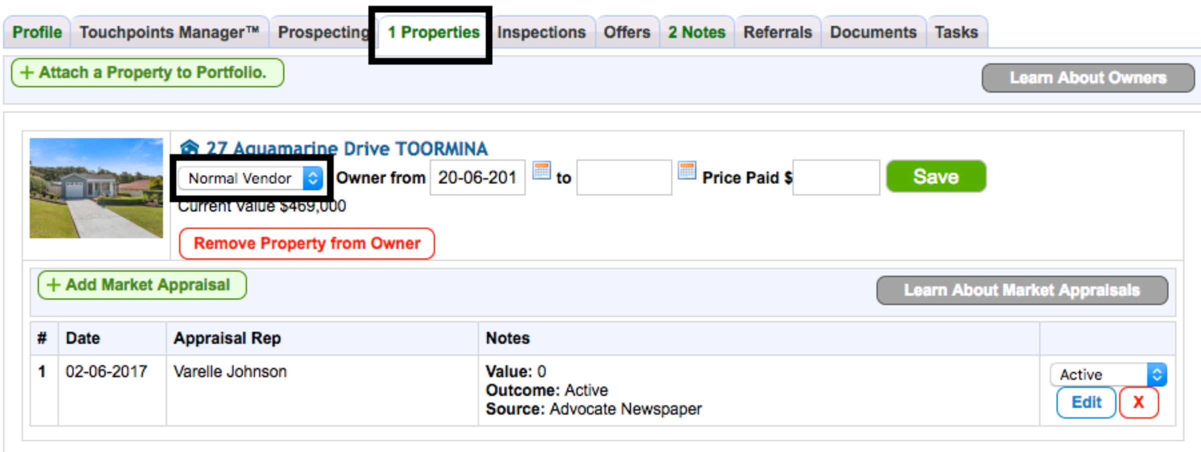
- Create the relationship between the contact and the property
- Log as chronological history against the property
- Log as chronological history against the contact
- Log in the Touchpoints Manager for the agents prospecting
- Show in all internal market appraisal reports

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.



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.**

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.**

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

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

This will bring up your market appraisal screen.

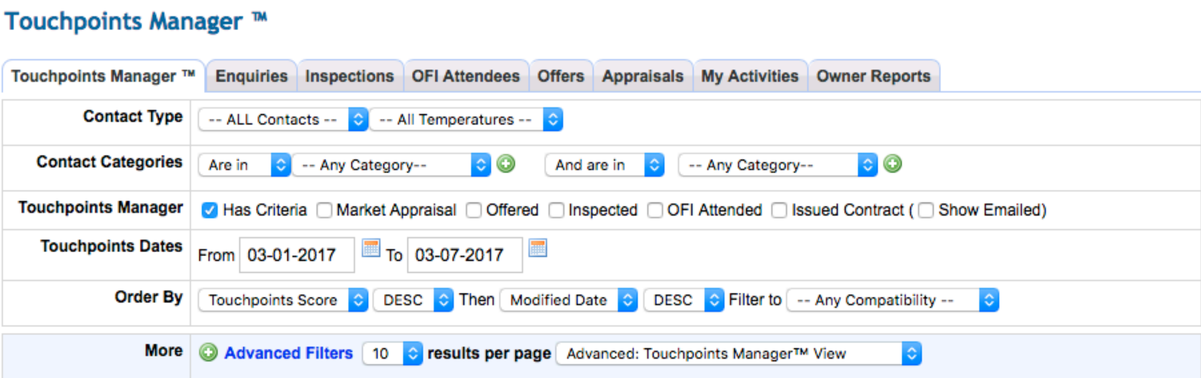
Touchpoints Manager/Prospecting

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.



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 10 of 22

« Previous | 1 | 2 | 3 | Next »

Contacts with Touchpoints Manager™, ordered by strong activity, then recent activity		Market App	Offered	Inspected	OFI'd	Criteria
Alex		✓	✓		✓	✓
Michelle		✓		✓	✓	✓
Robyn Parish		✓		✓	✓	✓
Sue		✓		✓	✓	✓
Ebony		✓			✓	✓
Shandy			✓			✓
Andree Cardow		✓				✓
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.

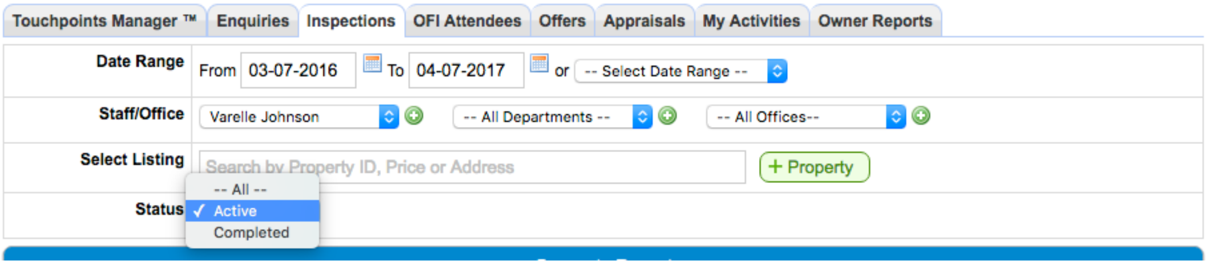
Owner Reports: The ability to send our owner reports for your properties.

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

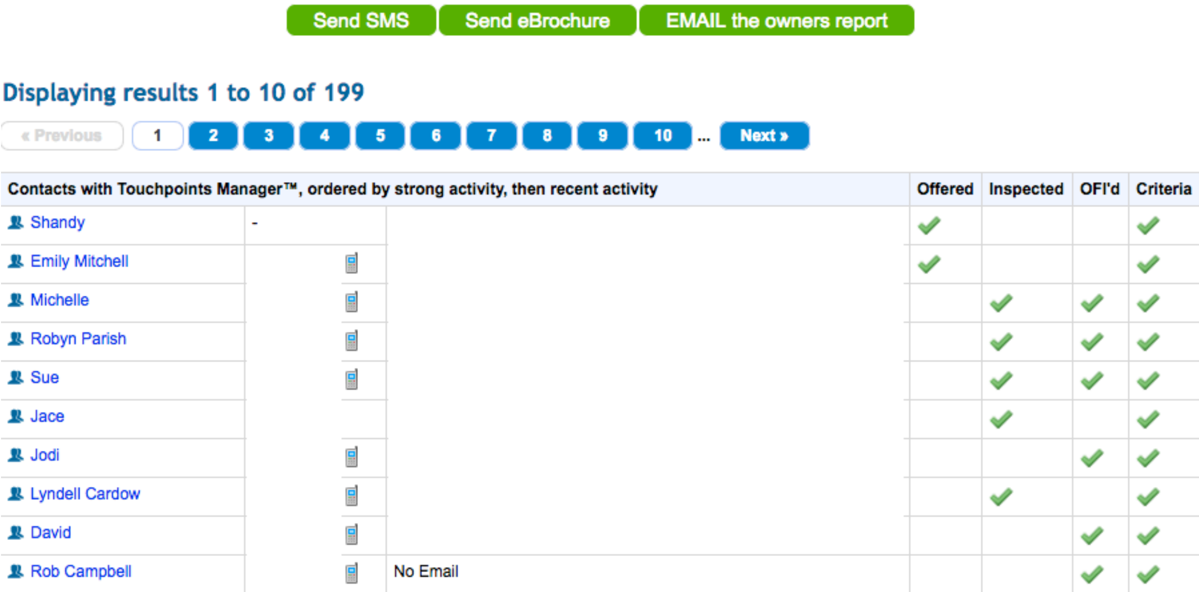
Once the activity has been completed, use this drop down to mark the activity as **completed**. This will remove this activity from your prospecting list only. The history of the activity will remain in ReNet logged against the contact and the property and will remain in reporting.

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



From any Property

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



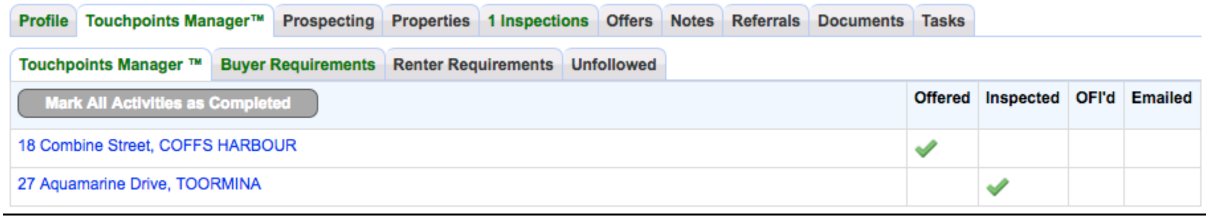
Contacts with Touchpoints Manager™, ordered by strong activity, then recent activity			Offered	Inspected	OFI'd	Criteria
Shandy	-		✓			✓
Emily Mitchell			✓			✓
Michelle				✓	✓	✓
Robyn Parish				✓	✓	✓
Sue				✓	✓	✓
Jace				✓		✓
Jodi					✓	✓
Lyndell Cardow				✓		✓
David					✓	✓
Rob Campbell		No Email			✓	✓

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



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.

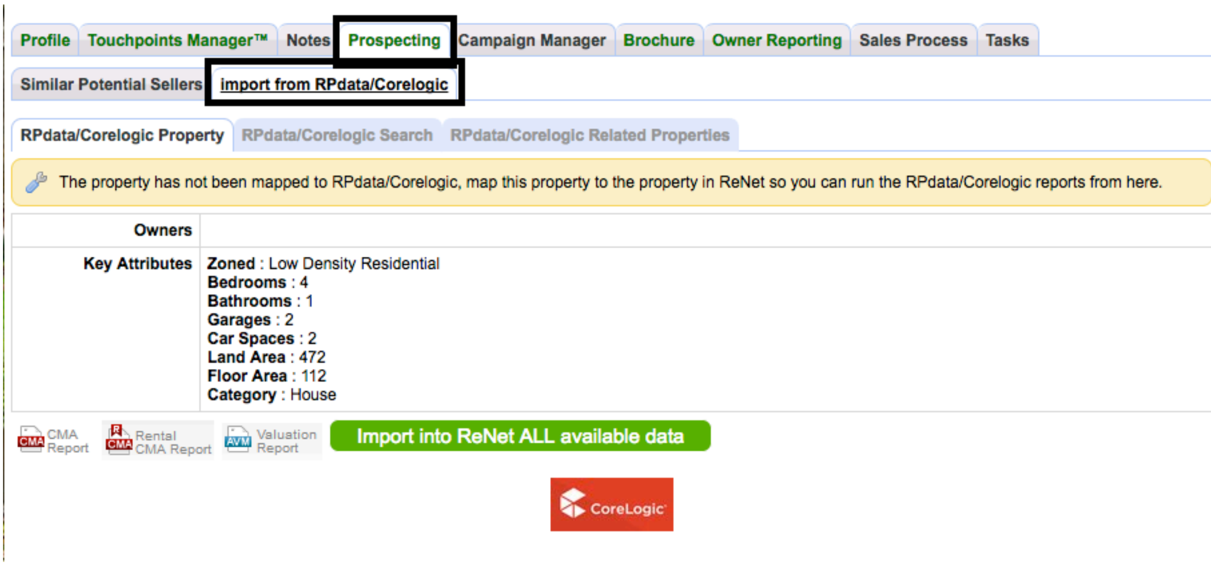
RP Data Integration

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.**



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:

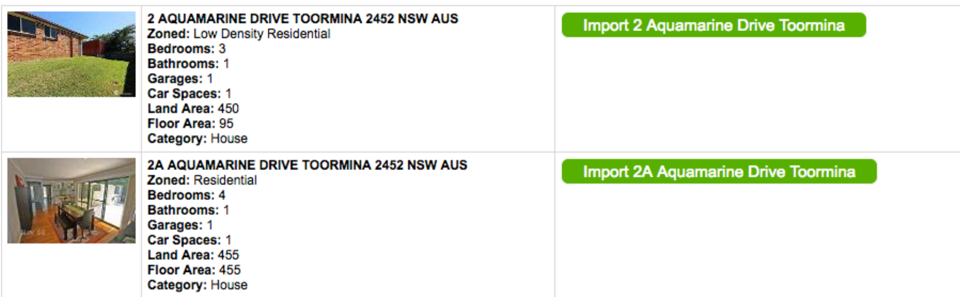
This notification explains that the owners contact details and previous sales history for the property will not be imported into the system.

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.**



	2 AQUAMARINE DRIVE TOORMINA 2452 NSW AUS **Zoned:** Low Density Residential **Bedrooms:** 3 **Bathrooms:** 1 **Garages:** 1 **Car Spaces:** 1 **Land Area:** 450 **Floor Area:** 95 **Category:** House	Import 2 Aquamarine Drive Toormina
	2A AQUAMARINE DRIVE TOORMINA 2452 NSW AUS **Zoned:** Residential **Bedrooms:** 4 **Bathrooms:** 1 **Garages:** 1 **Car Spaces:** 1 **Land Area:** 455 **Floor Area:** 455 **Category:** House	Import 2A Aquamarine Drive Toormina

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.

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:

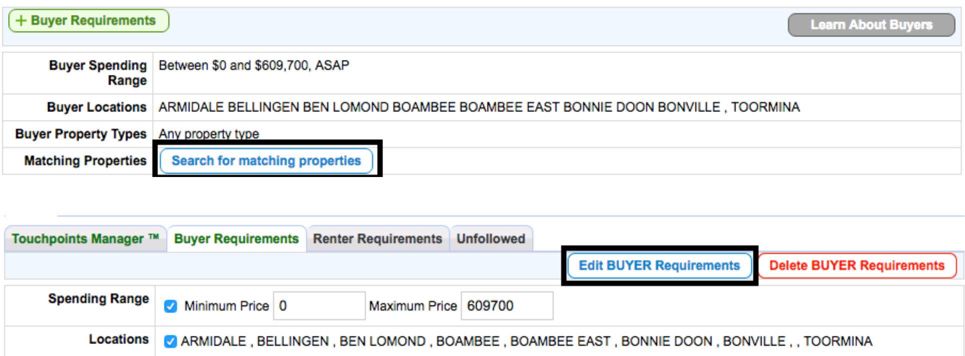
Manual eBrochures – These are the eBrochures that you select **Send eBrochure** from within ReNet to send to your contacts.

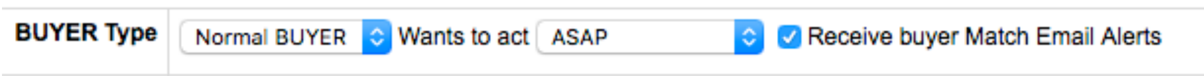
Automatic Alerts – These include your new listing, price reduction, sold, auction and automatic activity eBrochures.

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.**



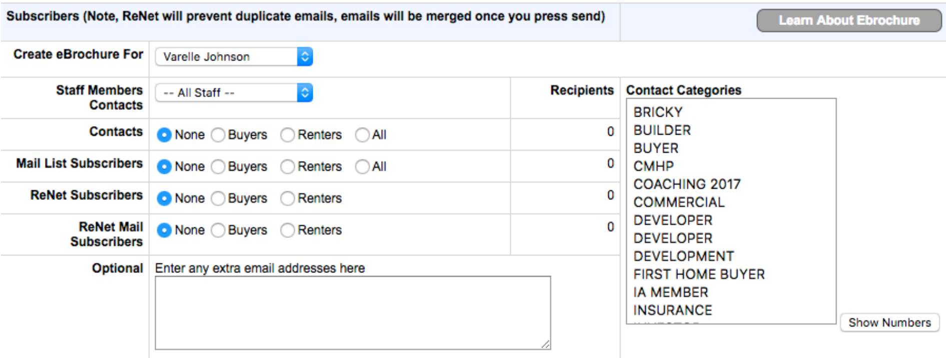


From this area untick the option to **Receive buyer Match Email Alerts.**

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.



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

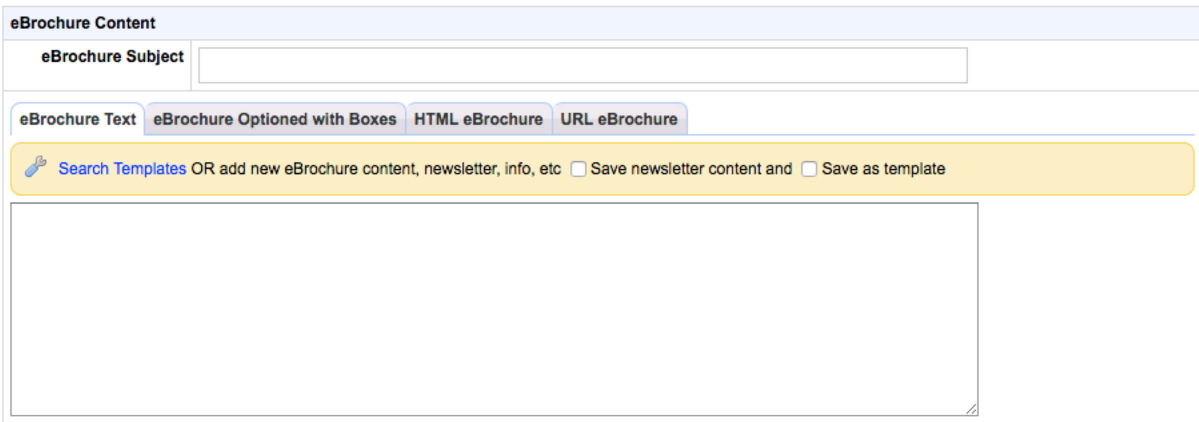
Mail List Subscribers: These are stored in a separate area of ReNet. This area stores only email addresses and they will not receive any automatic communication from your system.

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.

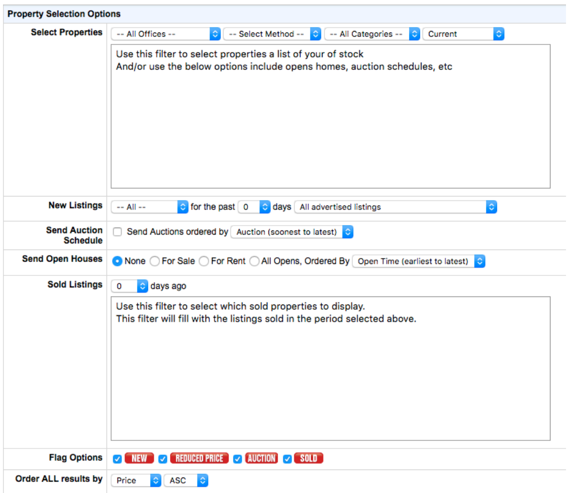
Contact Categories: These are the categories that you have in your ReNet system. You are able to select the category and then select **Show Numbers** to populate who this will send to.

eBrochure Content



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



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.

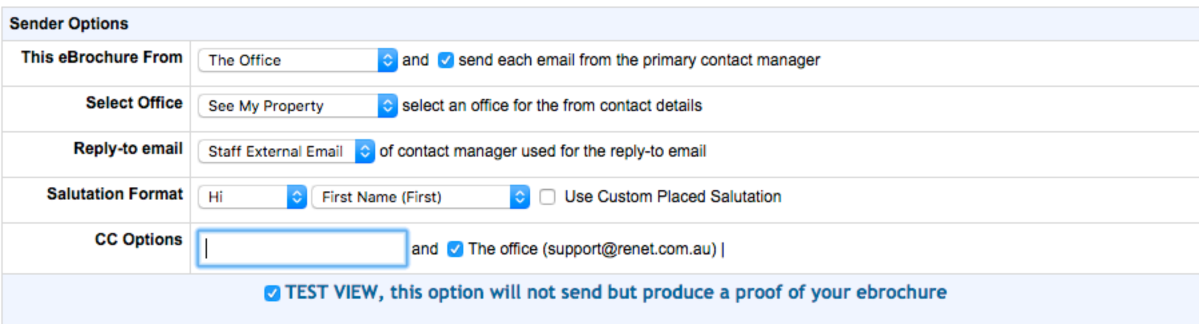
Send Open Houses: Have the ability to populate all of your open home listings automatically.

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



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.

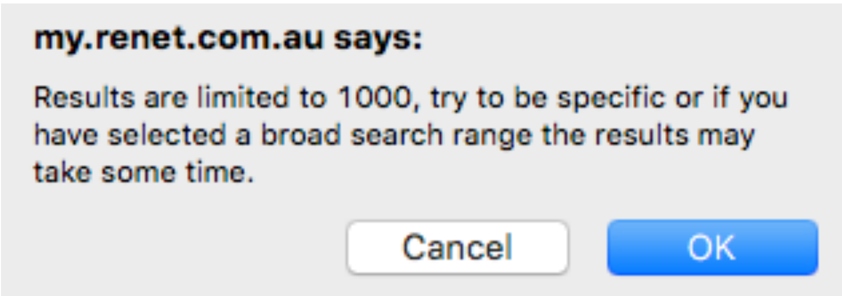
Reply-to-email: Where you would like all email replies to be sent back to.

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

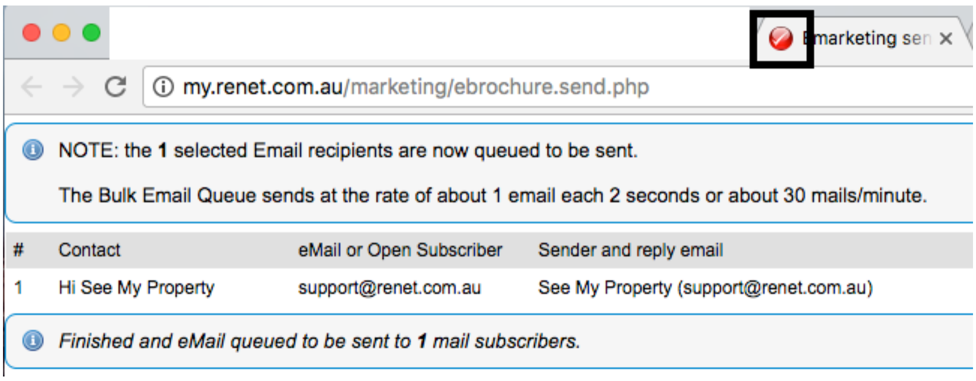
CC Options: This is to send yourself a copy of the eBrochure.

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.**



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.



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.

Profile | Touchpoints Manager™ | Prospecting | 1 Properties | 2 Inspections | 1 Offers | Notes | Referrals | Documents | 1 Tasks

Emails | Emailed Properties

eBrochure — Learn About Ebrochure

#	Date	Subject	Sender	Opens	Clicks	Clicked URL
1	08-06-2017 10:17 am	Thank you for attending the open home. Openings: 2	Varelle Johnson	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.

Property Selection Options

Select Properties

[17941825] : 27 Aquamarine Drive, TOORMINA - CURRENT
[17102445] $500,000 : 16 First Avenue, BIRDSVILLE - CURRENT
[14862405] $1,000,000 : 12 Sunny Avenue, WAVELL HEIGHTS - CURRENT
[14481495] 1 mil : 60 Vader Rd, SAWTELL - CURRENT
[13294455] : 430 Crossmaglen Rd, BONVILLE - CURRENT
[14860325] $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
[14860625] $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

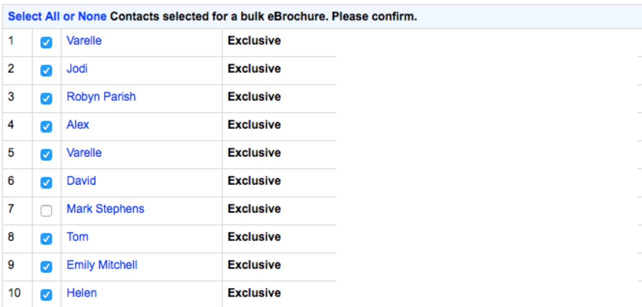
By using the CTRL key on your keyboard you are able to select and deselect multiple properties.

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.

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

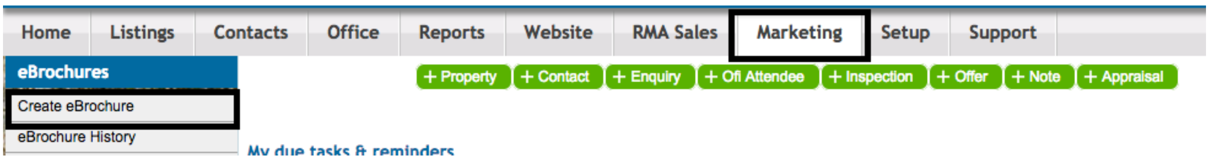


Under the contacts, you have the option to select which properties you would like to send.

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.

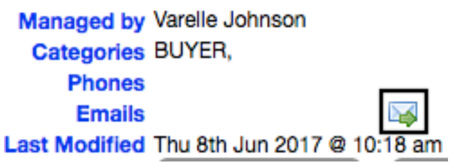


Here you will see all eBrochure options available.

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

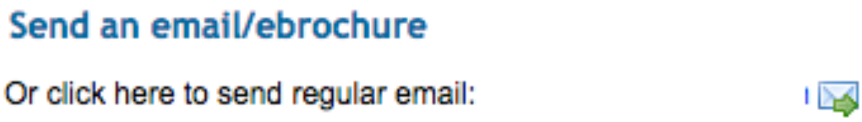
Sending from a Contact Card

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



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.



Sending Newsletters

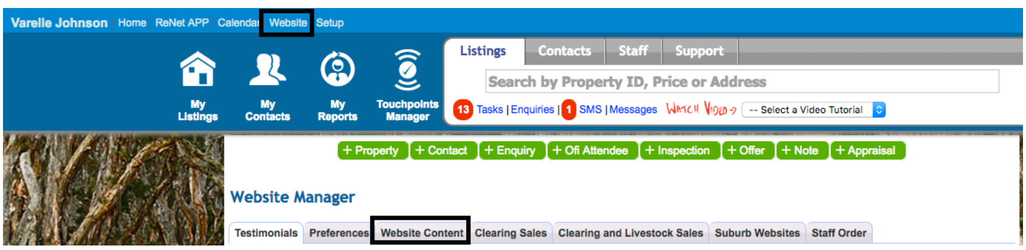
In addition to sending our properties via eBrochure, you also have the ability to send out newsletters to your contacts.

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

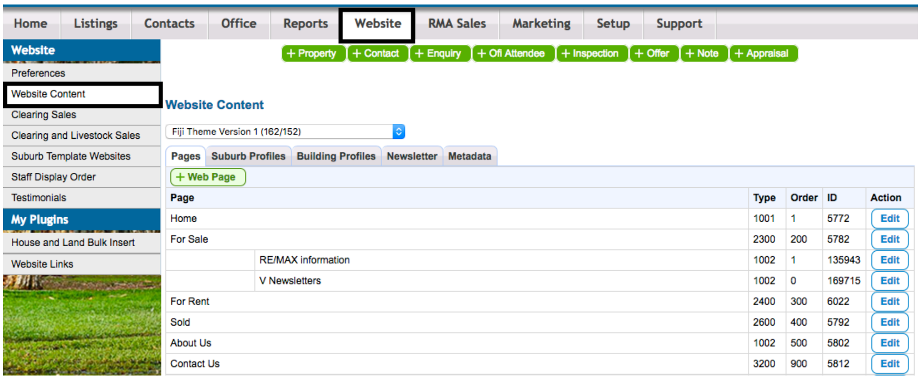
When saving as a JPG image you have the ability to embed this directly into the eBrochure area so this is seen as soon as the email is opened.

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

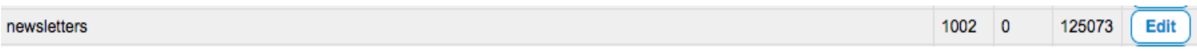
If you are logged in via sales rep admin please select **Website** from the top menu and then **Website Content**



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

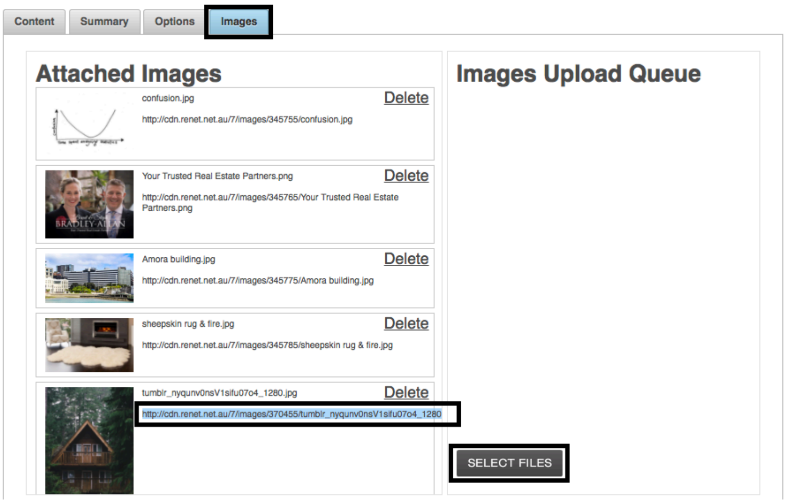


From any page with a grey background, select the **edit** button.



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.

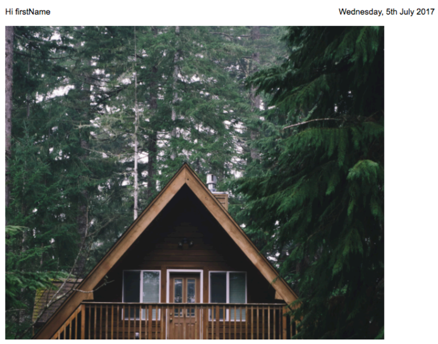


Once the URL is copied, go to your ebrochure area and paste this URL into the **eBrochure text** field

Around the outside of the URL enter the text:
At the start of the URL – <img src="
At the end of the UR – " width="600" />

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 -
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:

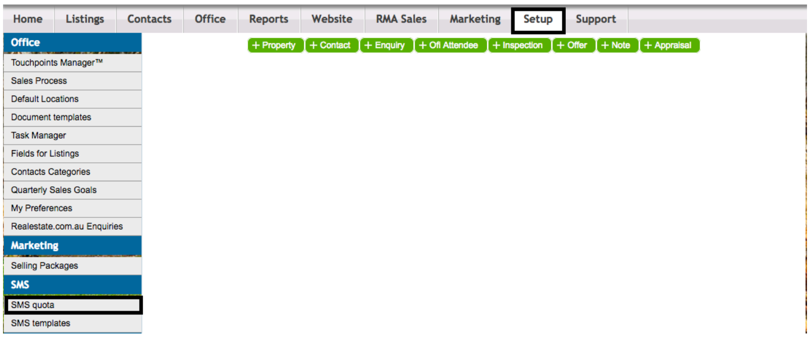
Once you paste this into the eBrochure area, your image will show a clickable hand, that will link you through to the destination URL.

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.**

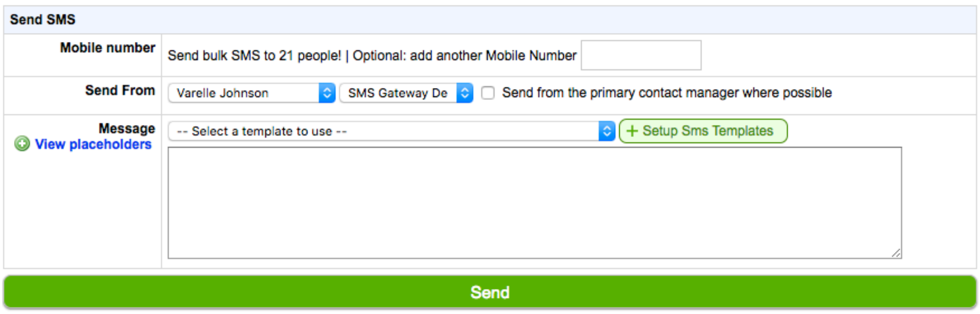


Then select **+ Purchase more SMS's.**

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.



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.

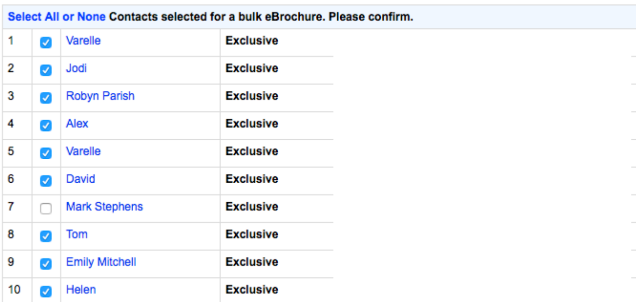
The standard size of an SMS is 160 characters. If you go over 160 characters you will use more SMS credits.

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

Sending from a contact search

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

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



Select All or None Contacts selected for a bulk eBrochure. Please confirm.

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

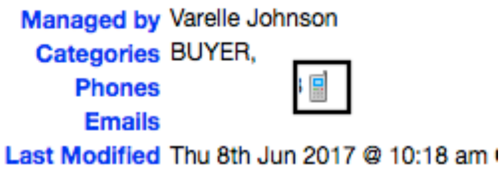
From the bottom of this area select **Build SMS to send.**

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.



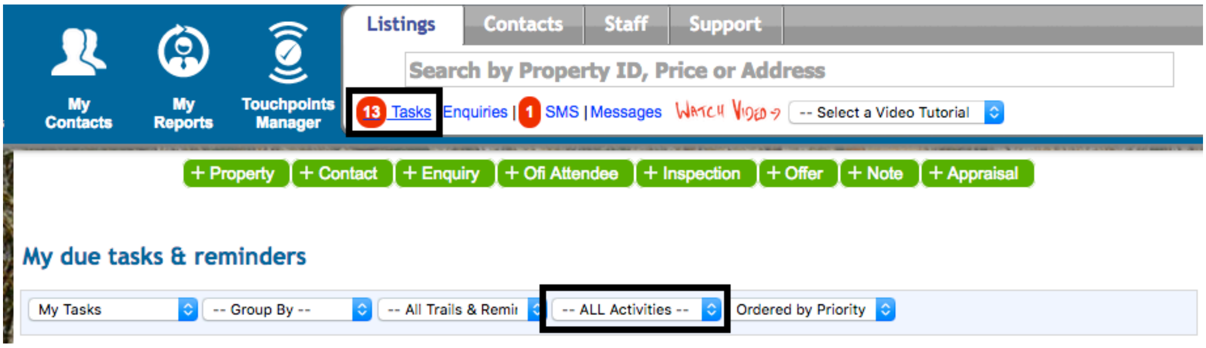
You will then see the send SMS Screen.

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.

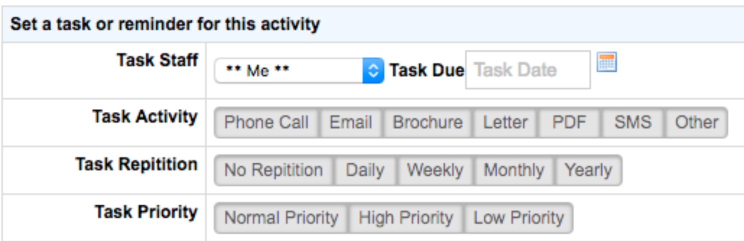
Once this has been sent, all of the tasks will be automatically marked as done.

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



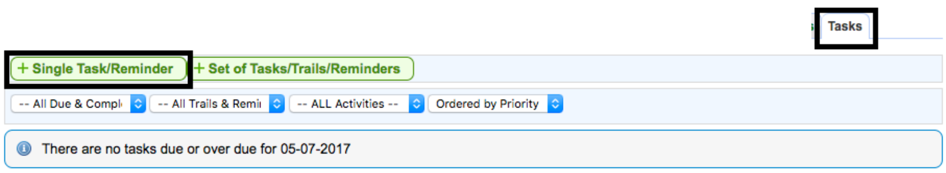
Task Staff: This is the staff member who is going to complete the task and the date you would like the task to start.

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.**



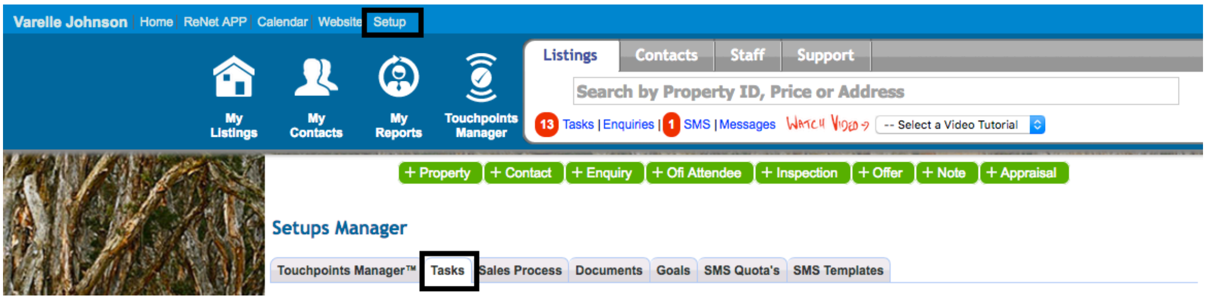
In addition to the normal options, you will see the ability to add the task description.

Tasks/Trails/Reminders

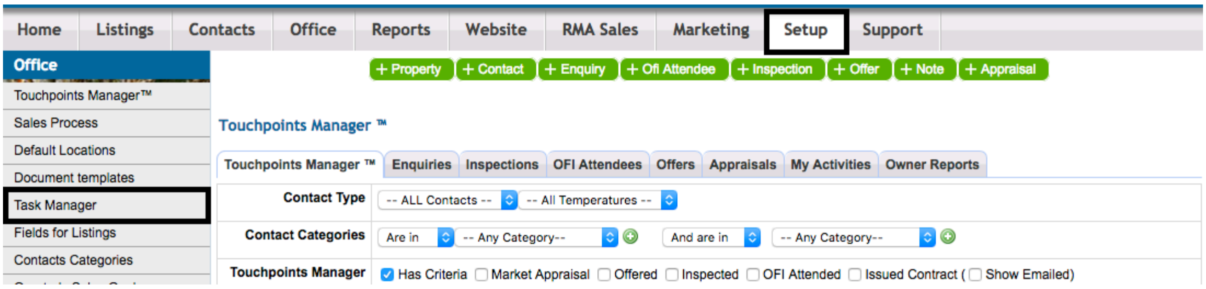
From a listing or a contact, you have the ability to set trail, which is a group of tasks to be completed by various staff members and each task may have a different due date.

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.

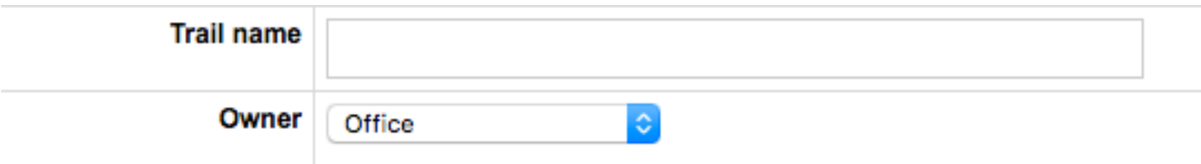
If you are logged in via salesrep admin go to **Setup** and then the **tasks tab.**



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



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



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

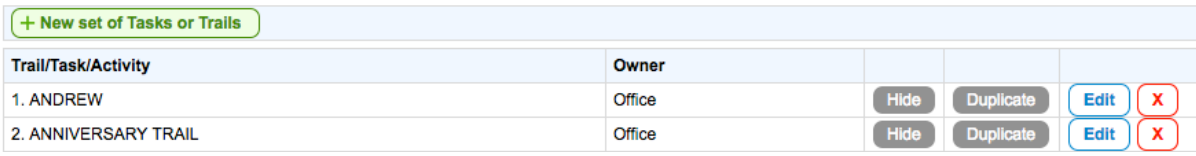
From the task setup area select the **Edit** button on your trail name.

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.

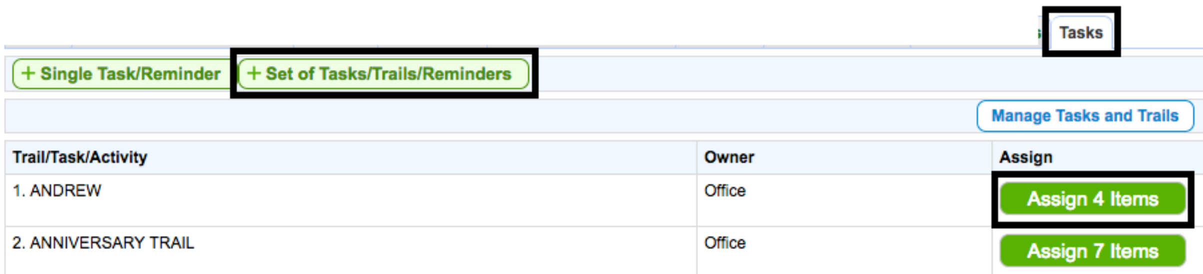
When going into the setup area you will see the option to **duplicate** your trail.



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

Assigning your Trail

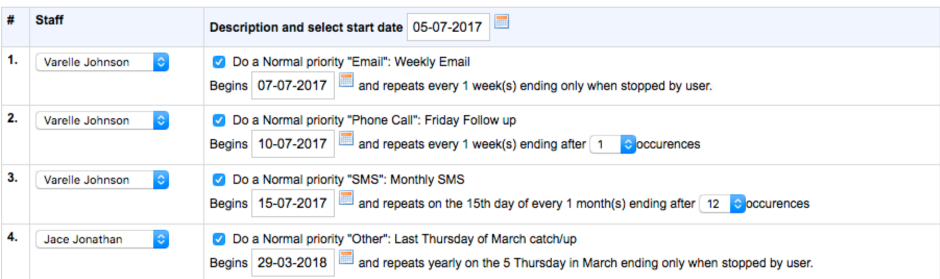
To assign your trail go to the tasks tab against your contact or your property and select + **Set of Tasks/Trails/Reminders.**



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.



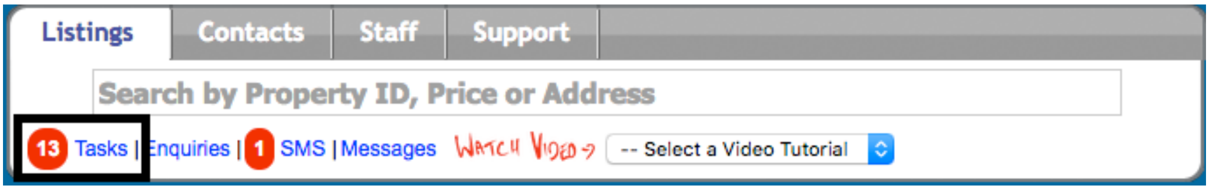
#	Staff	Description and select start date 05-07-2017
1.	Varelle Johnson	Do a Normal priority "Email": Weekly Email Begins 07-07-2017 and repeats every 1 week(s) ending only when stopped by user.
2.	Varelle Johnson	Do a Normal priority "Phone Call": Friday Follow up Begins 10-07-2017 and repeats every 1 week(s) ending after 1 occurences
3.	Varelle Johnson	Do a Normal priority "SMS": Monthly SMS Begins 15-07-2017 and repeats on the 15th day of every 1 month(s) ending after 12 occurences
4.	Jace Jonathan	Do a Normal priority "Other": Last Thursday of March catch/up Begins 29-03-2018 and repeats yearly on the 5 Thursday in March ending only when stopped by user.

You have the option to modify:

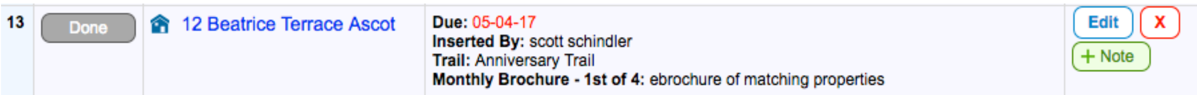
- The staff member to complete the task
- The due date
- How many occurrences the task will have
- The start date of the trail

Where tasks will display

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



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



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.

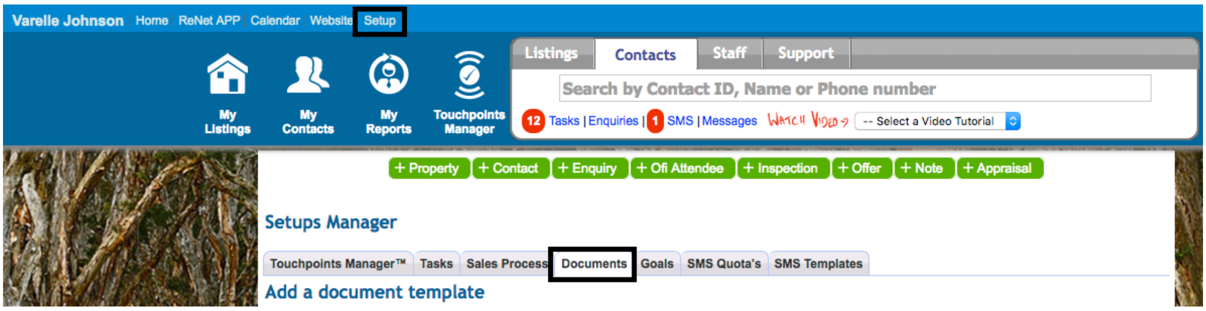
You will also receive an email every morning from ReNet with your daily tasks.

Documents

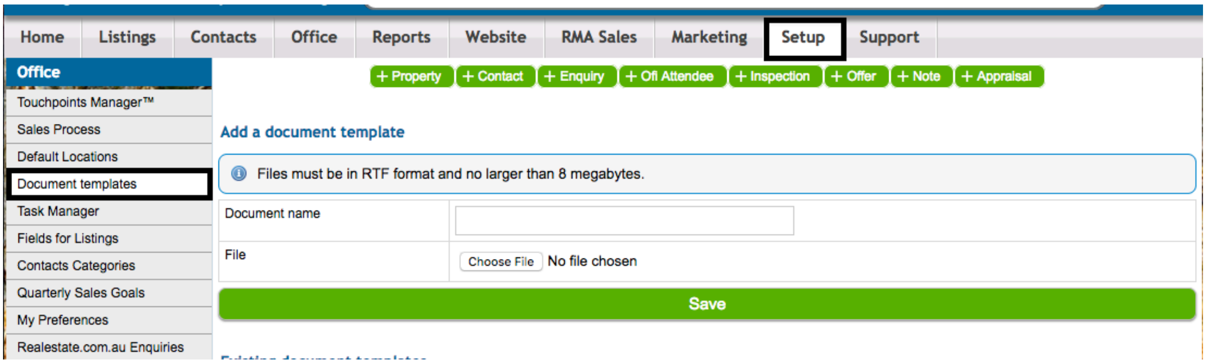
Within ReNet, you have the ability to set letter templates and create one to one letters.

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.**



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.

<<First Name>> <<Surname>>
<<Street Number>> <<Street>>
<<Town>> <<State>> <<Postcode>>

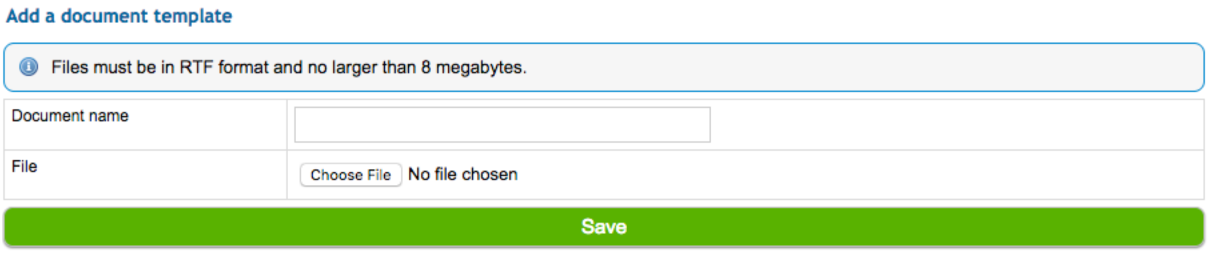
Dear <<First Name>>

Thank you for your recent Market Appraisal on <<MarketAppraisalProperty>>
The range of your Market Appraisal is <<MarketAppraisalAmount>> to <<MarketAppraisalAmountTo>>

Kind Regards

Varelle Johnson

Uploading letters

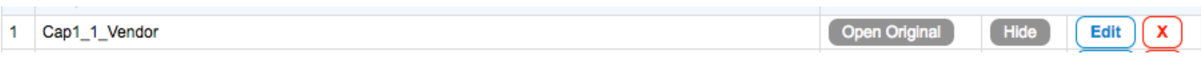


To upload your letters, go to the setup area:

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

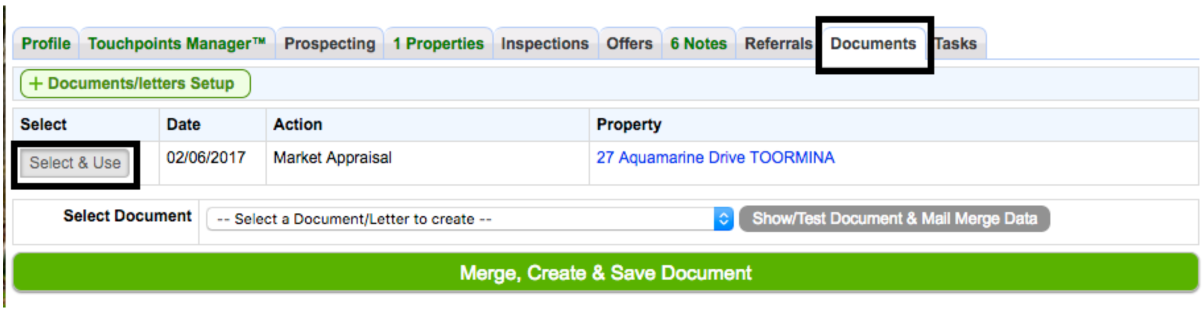


To edit your letters go to the setup area:

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.

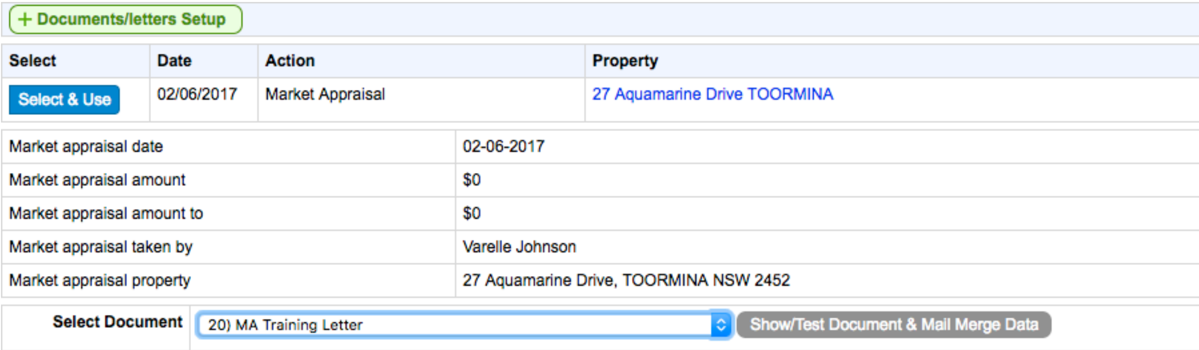
Creating Letters

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



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 date	02-06-2017
Market appraisal amount	$0
Market appraisal amount to	$0
Market appraisal taken by	Varelle Johnson
Market appraisal property	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.**

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.**

Through this area you have the ability to create:

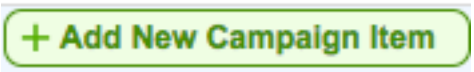
Campaign Proposal: This is created through the market appraisal stage to show how you are going to market the property. You will then convert this to a current campaign once this has been approved.

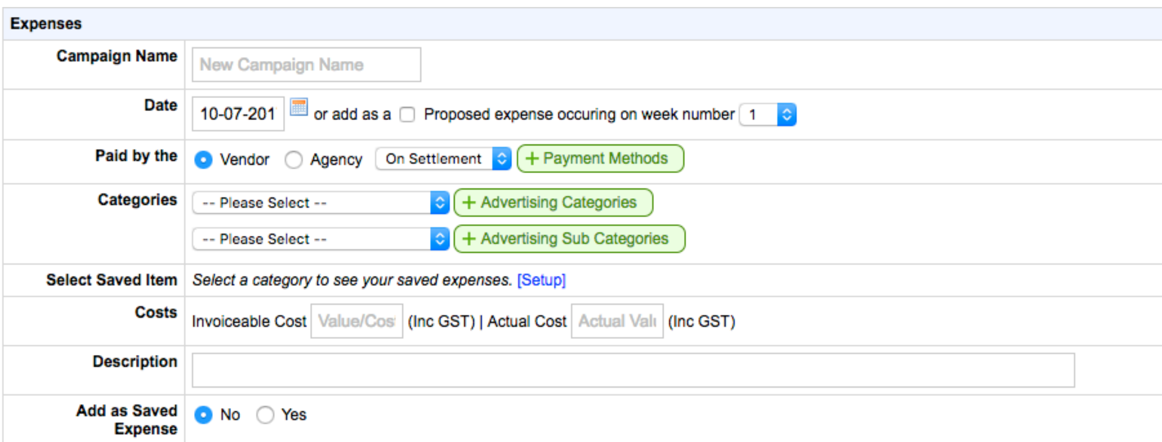
Campaign Expense: This is a current campaign with active marketing for the property. You are able to invoice from this area for vendor paid advertising and also mark off payments for marketing items.

Single Campaign Item

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.**





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.

Standard

1	10-07-2017	Newspaper	1/4 page ad colour	VPA On Settlement	+ Invoice	$50.00	$50.00	Edit X
						$50.00	**$50.00**	

Summary

1	Total Marketing $	50
2	VPA	50
3	Marketing Items	1

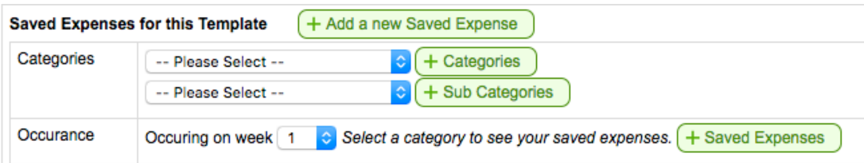
Payments Learn About Payments

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.**



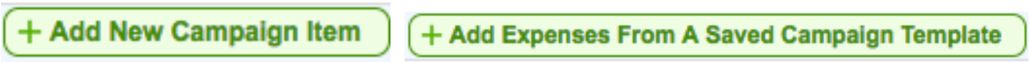
From your categories and sub category select your area and company and then the saved expenses will appear.

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.

Select **+Add a new Saved Expense**

Select **+ Saved Expense**

This will show all of your single saved expenses.

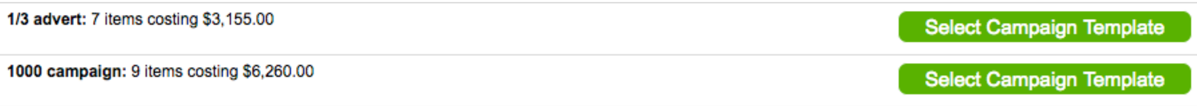
$440.00	$440.00	Advocate Article x 4	Advocates	DL Letter box drop flyer	Edit Delete

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

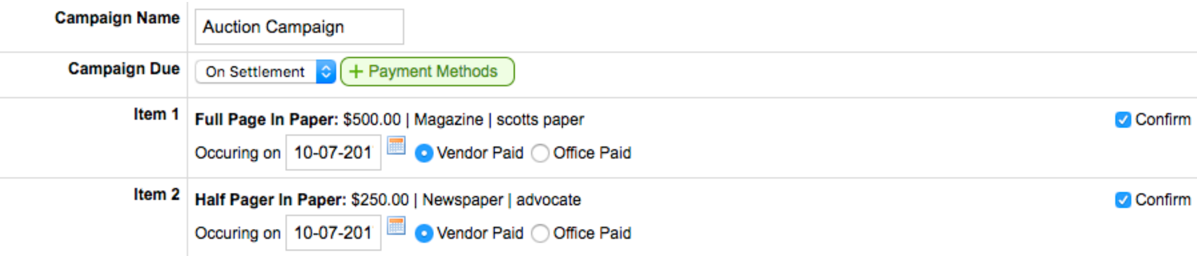
From your Campaign Manager select **+ Add From Campaign Template.**

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



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.



You are able to edit:

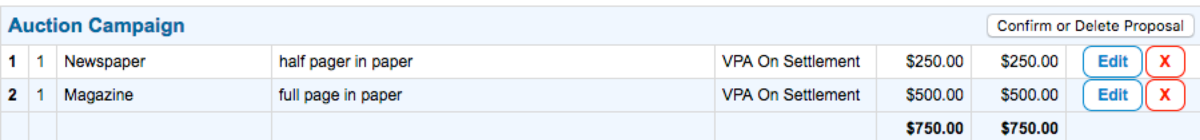
- The campaign name
- When the payment is due
- The item start date
- If the items are to be included in the campaign
- If these are vendor or office paid

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.



Auction Campaign							Confirm or Delete Proposal
1	1	Newspaper	half pager in paper	VPA On Settlement	$250.00	$250.00	Edit X
2	1	Magazine	full page in paper	VPA On Settlement	$500.00	$500.00	Edit X
					$750.00	$750.00	

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

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.

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

From your campaign item select **+ Invoice** + Invoice

Create a campaign invoice

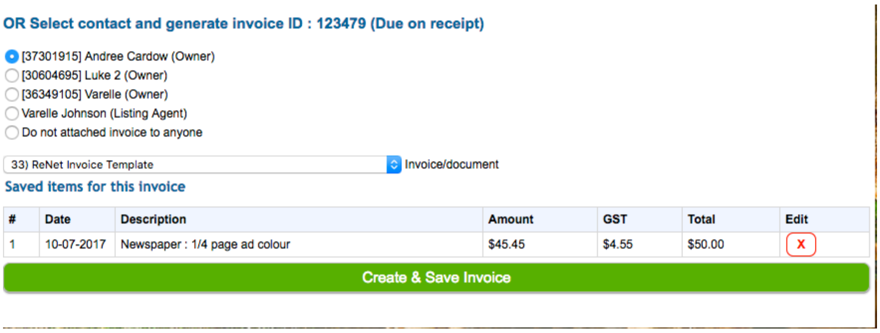
#	Select	Date	$ Cost	$ Inc GST	Description
1	☐	10-07-2017	$45.45 (Exc GST)	$50.00 (Inc GST)	Newspaper : 1/4 page ad colour
Invoice Number: 123479					

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.

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

To create the invoice select the invoice number.



This will show the options for:

Who the invoice will be created for

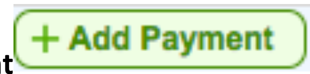
Which template you would like to use. We have provided a default template for you to use.

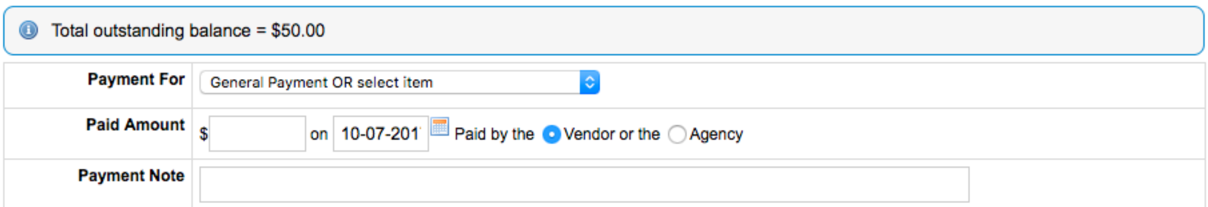
Select **Create & Save** Invoice and this will download directly into Microsoft Word.

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** 



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.

Payments Learn About Payments

#	Date	Category	Sub Category	Description	Notes	Paid By	Payment	
1	10-07-2017	Newspaper	advocate	1/4 page ad colour	-	Vendor	$25.00	Edit X
							$25.00	

Balance Sheets Learn About Balance Sheets

#	Agency Due	Vendor Due	Total Due	Agency Payments	Vendor Payments	Total Payments	Balance Due
1		$50.00	$50.00		$25.00	$25.00	$-25.00