

# eEdge Database Quick-Start Help Guide

**kw** TECHNOLOGY

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## Introducing eEdge: Your Lead-to-Close Solution

eEdge is the complete lead-to-close solution that's available exclusively to Keller Williams agents. It's an integrated system with four core modules designed to increase your efficiency and puts *The Millionaire Real Estate Agent's* models into action:

- **myContacts** is at the center of eEdge. It's a full contact management system that lets you organize your contacts into groups in a way that makes sense for your business, set follow-up reminders, and track every communication and activity you've had with each contact.
- myContacts is fed by **myLeads**—the lead management system. Regardless of where your online leads come from, they're all funneled into eEdge myLeads, and you're immediately notified via email and/or text.
- Cultivate leads, promote listings, and build relationships with **myMarketing**. You can create custom touch campaigns, listing and buyer presentations, property fliers, and more!
- Finally, contracts are closed through **myTransactions**—a true electronic solution including interactive online forms, e-signature capability for all parties, and transaction management. This time- and money-saving solution is fully integrated with myContacts and the Keller Williams Listing System (KWLS), resulting in greater agent and Market Center efficiency.



## Complete Your eEdge Setup Checklist

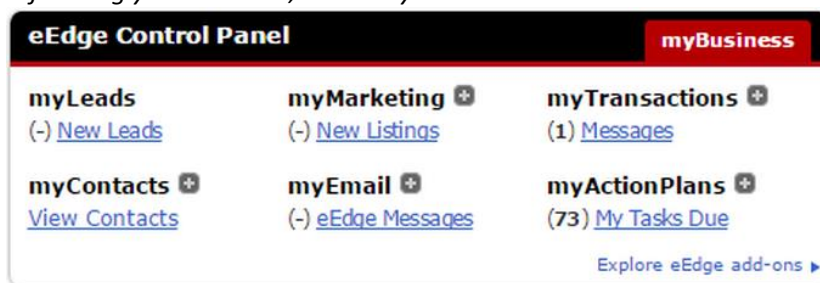
### 1. Activate Your eEdge Account

1. Log in to **mykw.kw.com**.
2. On the myKW homepage, confirm that the correct Market Center is listed. If you work in multiple Market Centers, you can change the office listed by clicking **Switch**.
3. Click the red **Activate eEdge Now!** button in the center of your screen.



4. You'll be presented with the option to purchase the KW Welcome Kit from our partner, Market Leader/Trulia. To proceed directly with your eEdge setup, click the button to **Activate my eEdge**.
5. On the Review and Accept Terms screen, perform the following:
  - a. Confirm the details of your subscription. If you opted to proceed directly to eEdge setup on the previous screen, you will not be charged.
  - b. Check the box under the Terms and Conditions box to confirm that you agree.
  - c. Enter your contact information, mailing address, and your electronic signature where indicated.
  - d. Click **Complete Order** to enable your account. *Note: The **Change Package** button allows you to upgrade to Market Leader Pro for an additional fee.*
6. On the Order Confirmation screen, review your order details and click **Next Step**.

7. On the Account Setup screen, perform the following:
  - a. Enter the zip code for your home office or billing address.
  - b. Name your eEdge website domain. *Note: In addition to a website, eEdge comes with an integrated email address. Your website domain and email address are named by completing this field. Once your account is named, you cannot change it, so choose a name that's consistent with your branding and is easy for your clients to remember.*
  - c. Click **Finish Setup**.
8. Your eEdge Control Panel will show immediately after you activate your account.  
*Note: If you don't see your eEdge Control Panel after completing the setup process, try refreshing your browser, or clear your browser's cookies and cache.*



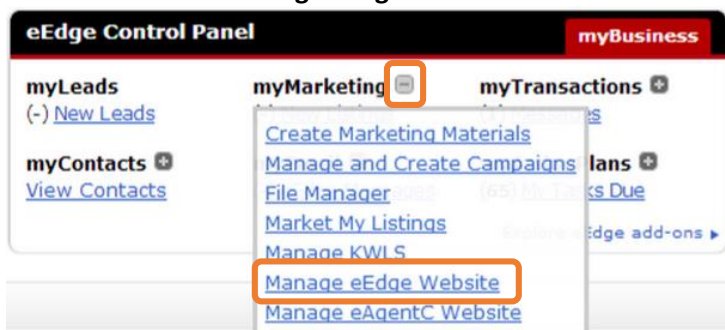
## 2. Fill Out Your eEdge Account Information

Your eEdge account information is displayed on your eEdge website as well as eEdge marketing materials.

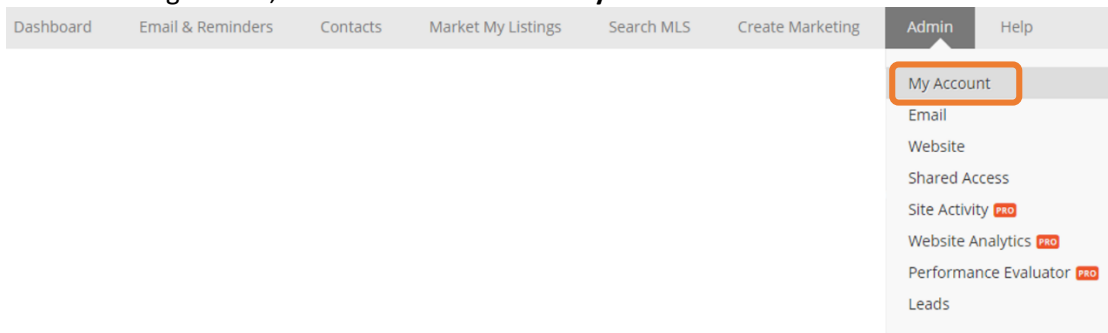


Example of agent-branded footer on an email marketing piece

1. From the **mykw.kw.com** home page, in your eEdge Control Panel, expand the **myMarketing** menu and choose **Manage eEdge Website**.



2. From the eEdge menu, click **Admin** then select **My Account**.



- On the **Admin > My Account** page, confirm you’re in the Settings section using the left navigation pane. This is where you’ll customize your contact information, default photos, and logos to be used on your eEdge website and marketing pieces.

The Settings section is further broken down into subsections (Profile Details, Marketing, and Additional Information), which can be expanded or collapsed.

**My Account** | **Email** | **Website** | **Shared Access** | **Site Activity** | **Website Analytics** | **Performance Evaluator** | **Leads**

**Settings**

- General Info
- Activity Alerts
- MLS Administration
- Orders
- Billing and Shipping

**Edit**

**Profile Details**

<b>Name:</b> Annie Agent Team	<b>Title:</b> Licensed Real Estate Agent
<b>Login:</b> edger@kwreality.com	<b>Password:</b> <a href="#">Change Password</a>
<b>Designations:</b> ABR, CIPS, CRS, GREEN, GRI, SR	<b>License/DRE:</b> 123456
<b>Website:</b> edger.kwreality.com	<b>Team:</b> <input checked="" type="checkbox"/>
<b>eEdge Email:</b> edger@kwreality.com	<b>Phone Numbers:</b> 512-555-1234
<b>External Email:</b> annie.agent@yahoo.com	512-555-5555

**Marketing**

<b>Marketing and Reply To Email:</b> annie.agent@yahoo.com	<b>Marketing Website:</b> annieagenthomes.com
<b>Call to Action:</b> Call for a free market report!	<b>Tag Line:</b> Everything I Touch Turns To Sold
<b>Branded Disclaimer:</b> Copyright 2015 Keller Williams® Realty, Inc. If you have a brokerage relationship with another agency, this is not intended as a solicitation. All information deemed reliable but not guaranteed. Equal Opportunity Housing Provider. Each office is independently owned and operated.	<b>Unbranded Disclaimer:</b> Copyright 2015 Keller Williams® Realty, Inc. If you have a brokerage relationship with another agency, this is not intended as a solicitation. All information deemed reliable but not guaranteed. Equal Opportunity Housing Provider. Each office is independently owned and operated.
<b>Marketing Address:</b> 1221 S. Mopac Expy Ste 400 Austin, TX 78746	<b>Check to Display:</b> <input checked="" type="checkbox"/> Realtor Logo <input checked="" type="checkbox"/> Equal Housing Logo
<b>My Mobile App:</b> http://app.kw.com/KW1OAG31	

**Additional Information**

**Additional Info:** Annie Agent is a fictitious name and is not a licensed real estate agent. To be connected with a great agent in your market, use the Agent Search feature at [www.kw.com](http://www.kw.com).

Anything entered in this field will appear in the footer of every page on your eEdge website. This is a great place to add analytic widgets and/or required information.

- Click the red **Edit** button to begin making changes.



## Profile Details

5. In the Profile Details subsection, complete the following fields.
  - a. **Name:** Your name—or your team’s name—as you want it to appear on your website, emails, marketing materials, and campaign pieces.
  - b. **Login:** Your login name for your Market Leader account. *Note: This is only needed if you are accessing your account directly through Market Leader and not through **mykw.kw.com** > **eEdge**.*
  - c. **Designations:** Any real estate designations that you are qualified to use.
  - d. **Website:** This will be completed for you as a result of the domain name you entered in the eEdge activation process.
  - e. At Keller Williams Realty, you get two email addresses:
    - i. **eEdge Email** is your @kwrealty.com email address, which you access through your eEdge account. Any leads that you capture on your eEdge website will come to you via your eEdge Email. This cannot be edited.
    - ii. **External Email** should be the address you use for your business every day, such as your @kw.com address, which you set up earlier and can access through Google Mail. Be sure this is an account that you check often, as it will be utilized for eEdge password recovery.

*Note: Your eEdge Email address will not appear on your website. Instead, your consumers will see an email link that, when clicked, will take the user to an email compose form. This is to help prevent you from receiving unwanted email messages.*

- f. **Title:** Your title as an agent, such as Broker or Listing Specialist.
- g. **Password:** Click to change your password for your eEdge account (powered by Market Leader). *Note: This is only needed if you are accessing your account directly through Market Leader and not through **mykw.kw.com** > **eEdge**.*
- h. **License/DRE:** Your real estate license number.
- i. **Team:** If you are part of a team, check this box to pluralize outgoing system-generated emails that normally can’t be customized (e.g., Initial Contact Wizard, Listing Alerts and Property Blasts). For example, phrases like “my website” will become “our website.”
- j. **Phone Numbers:** Enter an office phone number and/or mobile number.

▼ Profile Details

<p><b>Name*:</b> <input type="text" value="Annie Agent Team"/></p> <p><b>Login*:</b> <input type="text" value="edger@kwrealty.com"/></p> <p><b>Designations:</b> <input type="text" value="ABR, CIPS, CRS, GREEN, GRI, SR"/></p> <p><b>Website*:</b> <input type="text" value="edger.kwrealty.com"/></p> <p><b>eEdge Email*:</b> <input type="text" value="edger@kwrealty.com"/></p> <p><b>External Email*:</b> <input type="text" value="annie.agent@yahoo.com"/></p>	<p><b>Title:</b> <input type="text" value="Licensed Real Estate Agent"/></p> <p><b>Password:</b> <a href="#">Change Password</a></p> <p><b>License/DRE:</b> <input type="text" value="123456"/></p> <p><b>Team:</b> <input checked="" type="checkbox"/></p> <p><b>Phone Numbers:</b> <input type="text" value="512-555-1234"/></p> <p><input type="text" value="512-555-5555"/></p>
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## Marketing

6. Scroll down to the Marketing subsection and complete the following fields.
  - a. **Marketing and Reply To Email:** This is the email address that will be used on your marketing designs and where you will receive replies from emails you've sent through eEdge.  
*Note: By default, this will be set to your eEdge Email (your @kwrealty.com address). You can, however, change this to your External Email, if you want to promote that instead and are able to check it often. Keep in mind that by changing this, you'll lose the ability to track all correspondences with contacts via your eEdge Email.*
  - b. **Call to Action:** Include a phrase like "Call me for a free market report!" that invites your customers to respond. This will be integrated into marketing pieces such as postcards and listing fliers.
  - c. **Branded Disclaimer:** Populates at the bottom of each marketing piece.
  - d. **Marketing Address:** The return address to be printed on any direct mail marketing pieces you create, as well as on your buyer and listing presentation templates.
  - e. **My Mobile App:** Replace the generic link with your custom mobile app URL and the link will automatically be added to the footer of all of your marketing emails. To find your mobile app URL, go to [mykw.kw.com](http://mykw.kw.com) > **Technology** > **KW Mobile App Resources**. Then copy the URL displayed in step 3 and paste into the My Mobile App field in your eEdge settings.
  - f. **Marketing Website:** This field allows you to feature a different website than your eEdge website on your marketing pieces. As a best practice, though, we recommend leaving this field blank to ensure your leads are staying active and engaged on your eEdge website, so you can see their activity.
  - g. **Tag Line:** This will appear on the About page of your eEdge website. Use this for your "elevator pitch" to help build relationships with new prospective clients and capitalize on networking opportunities. Can fit up to 160 characters.
  - h. **Unbranded Disclaimer:** This section only populates on marketing-in-motion pieces, which have been discontinued.
  - i. **Realtor and Equal Housing Logos:** Click the appropriate check boxes to have the logos display on various marketing pieces.

Marketing

<p><b>Marketing and Reply To Email:</b> <input type="text" value="annie.agent@yahoo.com"/></p> <p><b>Call to Action:</b> <input type="text" value="Call for a free market report!"/></p> <p><b>Branded Disclaimer:</b> <input type="text" value="Copyright 2015 Keller Williams® Realty, Inc. If you have a brokerage relationship with another agency, this is not intended as a solicitation. All"/></p> <p><b>Marketing Address:</b> <input type="text" value="1221 S. Mopac Expy Ste 400"/>  <input type="text" value="Austin"/> <input type="text" value="TX"/> <input type="text" value="78746"/></p> <p><b>My Mobile App:</b> <input type="text" value="http://app.kw.com/KW1OAG31"/></p>	<p><b>Marketing Website:</b> <input type="text" value="annieagenthomes.com"/></p> <p><b>Tag Line:</b> <input type="text" value="Everything I Touch Turns To Sold"/></p> <p><b>Unbranded Disclaimer:</b> <input type="text" value="Copyright 2015 Keller Williams® Realty, Inc. If you have a brokerage relationship with another agency, this is not intended as a solicitation. All"/></p> <p><b>Check to Display:</b> <input checked="" type="checkbox"/> Realtor Logo  <input checked="" type="checkbox"/> Equal Housing Logo</p>
--	--

## Additional Information

7. Scroll further down the page to the Additional Information subsection and complete the fields that appear there. We recommend replacing any default prewritten text with your own unique content.
  - a. **Additional Info:** All of the text entered here will appear in the footer of every page of your eEdge website.
  - b. **Experience:** This is an opportunity to tell your website visitors more about you, your business, and why they should work with you.
  - c. **Awards & Certifications:** List awards or certifications that you've earned which will help you stand out from other agents.

### Notes:

- Use the formatting toolbar in each of these sections to customize the appearance of the text on your websites so that it looks professional and is easy to read.
- Optionally, if you are familiar with HTML coding, click the **Source Code** ( `<>` ) button to edit the code directly. This is useful for a higher level of customization, such as adding a video.

▼ Additional Information

**Additional Info:**

B I U ☰ ☰ ☰ ☰ Paragraph ▾ Font Family ▾ Font Sizes ▾ ☰ ☰ ☰ ☰ ↶ ↷ A ▾ A ▾

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Annie Agent is a fictitious name and is not a licensed real estate agent. To be connected with a great agent in your market, use the Agent Search feature at [www.kw.com](http://www.kw.com).

Anything entered in this field will appear in the footer of every page on your eEdge website. This is a great place to add analytic widgets and/or required information.

This text will appear in the footer of your website.

**Experience:**

B I U ☰ ☰ ☰ ☰ Paragraph ▾ Font Family ▾ Font Sizes ▾ ☰ ☰ ☰ ☰ ↶ ↷ A ▾ A ▾

🔗 🔗 🖼️ Ω 😊 I<sub>x</sub> <>

As an agent who's an expert in this local area, I bring a wealth of knowledge and expertise about buying and selling real estate here. It's not the same everywhere, so you need someone you can trust for up-to-date information. I am eager to serve you. Here are some of the things I can do for you:

**Find Your Next Home**  
You need someone who knows this area inside and out! I can work with you to find the right home at the right price for you, including all the neighborhood amenities that matter - not to mention the essential criteria you have for your ideal home

**Sell a Home**  
When it's time to move, you need someone who will advertise your home, show to prospective buyers, negotiate the purchase contract, arrange financing, oversee the inspections, handle all necessary paperwork and supervise the closing. I can take care of everything you need, from start to close.

**Awards & Certifications:**

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Winner of the 2014 The Retail Deal of the Year Award (Most Ingenious Retail Deal of the Year)

Save
Cancel

8. Click **Save** when you are finished.

## Social Media Options

Adding links to your social media profiles lets your consumers connect with you on a more personal level. When you add a link for your social media profile, an icon will be placed on the About page on your eEdge website, as well as in marketing and campaign pieces. When any of the social media icons are clicked, your consumers will be taken to that particular social media profile page.

The screenshot shows a real estate agent's profile for Annie Agent Team. It includes contact information, a license number, and a section for social media options with icons for YouTube, Facebook, LinkedIn, and Email. There are also 'Contact Me' and 'Recommend' buttons.

9. Scroll down the page to the Social Media Options subsection.

10. Click **Add Social Media**.

Social Media Options		
URL Type ^	URL	Actions
Blogger	http://blogspot.com	
Facebook	http://www.facebook.com	
LinkedIn	http://www.linkedin.com	
YouTube	http://youtu.be/7sq1D4kqEbU	

**Add Social Media**

11. Select the social media platform from the **URL Type** drop-down menu.
12. In the **URL field**, enter the address of your social media profile for that platform.
13. Click **Save**.

Add Social Media

**URL Type:**

**URL:**

**Save** **Cancel**

## Agent MLS ID

Adding your MLS ID allows you to connect your personal listings to your account, making it easy to email your listings directly to your consumers. This will also enable your listings to be featured on the home page of your website and automatically populate your listing's details into property-specific marketing materials in your eEdge Marketing Center.

Agent MLS ID		
MLS Name ▾	ID	Actions
Coastal Bend	999999	 

[Add Agent MLS ID](#)

14. Scroll further down the page to the Agent MLS ID subsection.
15. Click **Add Agent MLS ID**.
16. Confirm that the correct MLS is showing in the MLS Name field, or “KWLS” if Market Leader IDX is not available for your MLS. *Note: If you belong to more than one MLS, you will want to select the drop-down menu and choose the MLS for which you are adding the Agent ID.*
17. Enter your ID in the **ID** field. This is the membership ID you use when posting your listings onto your MLS. If you are using KWLS, your ID will be your KW White Pages Associate ID.

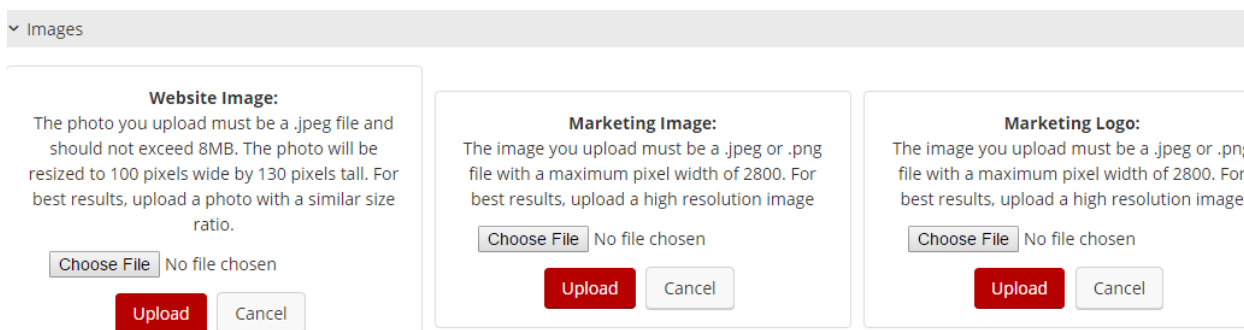
## Images

Finally, you'll upload your professional headshot photo and logo to be used on your website, emails and marketing materials.

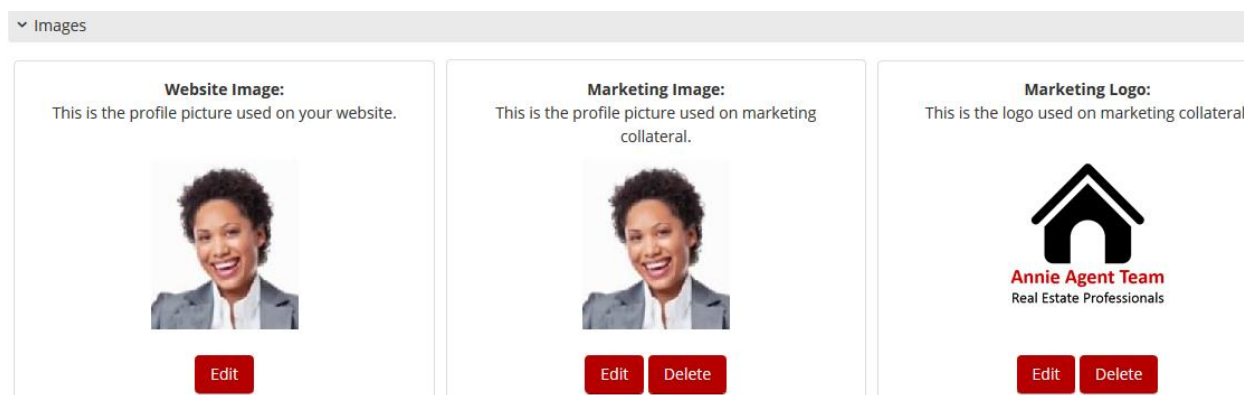
18. Scroll down to the Images subsection at the bottom of the page.
19. As you'll see, you can upload three images.
  - a. **Website Image:** This is a professional headshot photo of you that appears on your website, automated Welcome Email, Initial Contact Wizard Email, Listing Alert Email, and Property Blast Email.
  - b. **Marketing Image:** This is typically a professional photo of you that will appear on any materials you create in your Marketing Center as well as your Seller's Market Report email. You can choose to have the same image as your Website Image, or you may select a different photo.
  - c. **Marketing Logo:** This might be your office or agency logo, or any graphic you would like to appear on your marketing materials.

20. To add an image, click the **Edit** button for that image.
21. Review the size requirements for the images you are uploading.  
*NOTE: There are several free online tools that make it simple to resize, crop and add effects to your images, such as <https://pixlr.com/editor>.*
22. Click **Browse** to find the image on your computer, ensuring that it meets the requirements.
23. Click **Upload** once you have selected an image.

*Before*



*After*



### 3. Preview Your eEdge Website

To preview your eEdge website, perform the following steps:

1. From the Admin > My Account page, select **General Info** in the left navigation pane.
2. Be sure to fill out any unpopulated fields in this section, or make adjustments as needed. These fields will be used to populate the About page on your eEdge website.
  - a. Click **Edit** to open up the fields for editing.
  - b. Click **Save** when finished.
  - c. Click **View your website** to see the results.

The screenshot displays the eEdge website admin interface. At the top, there is a navigation bar with the following items: Dashboard, Email & Reminders, Contacts, Market My Listings, Search MLS, Create Marketing, Admin (highlighted), and Help. Below this is a secondary navigation bar with buttons for My Account, Email, Website (highlighted), Shared Access, Site Activity PRO, Website Analytics PRO, Performance Evaluator PRO, and Leads. The main content area is titled 'Review Contact Information for Your Office' and includes a sub-header 'You can edit the company information that appears on your website. [View your website.](#)' The contact information is listed as follows: Company Name: KWRI, Address: 1221 S. Mopac Expy #400, City: Austin, State/Province: TX, Zip/Postal Code: 78746, Office Phone: 512-555-5555, Fax: (blank), and Time Zone: (GMT-06:00) Central Time. A red 'Edit' button is located at the bottom left of the contact information section. A 'Notes (affiliations, comments, etc.):' section contains the text: 'Annie Agent is a fictitious name and is not a licensed real estate agent. To be connected with a great agent in your market, use the Agent Search feature at [www.kw.com](http://www.kw.com).'

## 4. Set Up Activity Alerts

When Keller Williams Realty conceived eEdge in 2010, the industry was leaving, on average, **67 percent of online leads unanswered!** When we sat down with our agents, we quickly realized that it wasn't their fault! They had leads coming in from all over the place—email, contact forms, listing inquiries—and much of the time, they didn't know the leads were there. There was no way to systematically handle leads from various sources. So, eEdge was built to help ensure our agents' leads didn't fall into that 67 percent.

eEdge offers a lead alert system so you can respond to new Internet leads before they get away.

1. On the Admin > My Account page, from the left navigation pane, click **Activity Alerts**.
2. Click **Edit** under the “Daily Alerts” subsection to open up the fields for editing.
3. In the “Contact Methods” subsection, specify where you'd like to receive alerts.
  - a. To set up a text alert, enter your cell phone number with no spaces. Then, select your carrier from the drop-down list.
  - b. To set up an email alert, enter the email address at which you want to receive alerts—one that you will check frequently.
4. Click **Add Another** when you are done. Repeat this process to set up additional alerts (you may create up to three of them). *Note: Some agents use the extra alert settings to add their administrative assistant or real estate partner to ensure that someone can follow up immediately with new Internet leads.*
5. In the “Alert Subscriptions” subsection, specify the alerts you want to receive and in what format.
6. Finally, you can opt to receive a Daily Alert at your External Email address. This is an automatic email sent to you with a summary of activity on your website from the previous day. It features contacts sorted by lead status and includes the contacts' names, email addresses, and phone numbers.
  - a. Navigate to the Daily Alerts subsection
  - b. Click the **Subscribed** checkbox and verify your External Email address to start receiving the daily activity email.
  - c. Click **Save**.
  - d. You'll immediately receive email and/or text confirmation from eEdge that your alerts have been set up.

Dashboard | Email & Reminders | Contacts | Market My Listings | Search MLS | Create Marketing | Admin | Help

My Account | Email | Website | Shared Access | Site Activity | Website Analytics | Performance Evaluator | Leads

Settings  
General Info  
Activity Alerts  
MLS Administration  
Orders  
Billing and Shipping

### Activity Alerts

Automatically stay in touch with your contacts and up-to-date with your website activity.

### Contact Methods

Your alerts will be delivered via the following contact methods. To add or remove contact methods, choose the edit option.

**Text Message:** 555998745 (AT&T)  
**Email:** annie.agent@kw.com

### Alert Subscriptions

Below is the status of your current alert subscriptions. Pick and choose which alerts you would like to receive by selecting the edit option.

	Text	Email
<b>New Contact:</b>	On	On
<b>Contact Updated Information:</b>	Off	On
<b>New Message from Contact:</b>	On	Off
<b>New Message from Non-contact:</b>	On	Off
<b>New Recommendation on Website:</b>	Off	On

### Daily Alerts

Are you missing out on daily alerts? Subscribe to a daily alerts email to get a summary of contacts who visited your website yesterday and reminders that are due today.

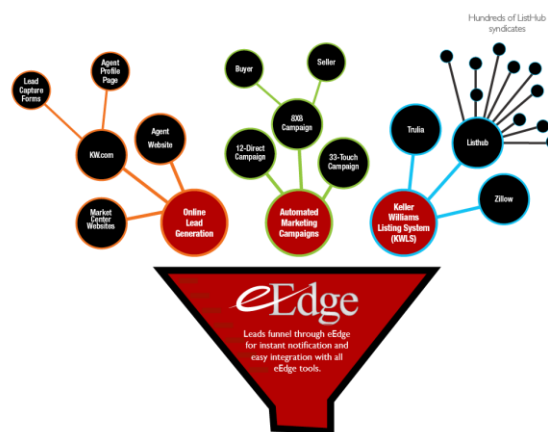
**Subscribed:** Yes  
**Email:** annie.agent@yahoo.com  
**Edit**



## myLeads: Don't Miss Another Lead

The websites in the KW lead generation network give you presence and power in online searches. All of these websites work together with one objective: **to connect potential clients to you.** We aim to make you the premier resource for consumers looking for real estate online in your market because you are the expert.

Regardless of where your online leads come from within the KW lead network—whether an agent website or mobile app, Market Center website or app, a listing landing page, or anywhere within the KW lead network—all leads are funneled into one place: **eEdge.**



## View Your Dashboard

New online leads in eEdge will appear on your eEdge myLeads Dashboard just after they register. They are also immediately added to your myContacts database and are marked as new leads.

Dashboard | Email & Reminders | Contacts | Market My Listings | Search MLS | Create Marketing | Admin | Help

New Contacts (8) [View All Contacts](#)

Contact	Looking In	Avg Price	View	Save	Created	Activity	Status	Actions
Betty B. Buyer 		\$0	0	0	10/23/15	10/23/15	Lead	See All
Carl Client 		\$0	0	0	9/30/15	9/30/15	Lead	See All
Sammy Sellzit 		\$0	0	0	9/29/15	9/29/15	Lead	See All

## Respond to New Leads

### Lead Follow-up Process

1. To initiate contact with a new lead, click their name on the Dashboard.
2. The lead’s contact summary page will appear, and you’ll prepare to make your first contact with this person.

IF	THEN
You captured the lead on your eEdge website	<ol style="list-style-type: none"> <li>1. eEdge will send them a welcome email with login credentials, allowing them to return to your site and view their saved information.</li> <li>2. eEdge will notify you by text and/or email if you have enabled activity alerts.</li> <li>3. You can use the Initial Contact Wizard (ICW) to guide you through your first conversation with them. Proceed to step 3.</li> </ol>
The lead came into eEdge through any other method	The ICW will not be available; call or email the lead using your own scripts. Skip to step 5.

3. Click **Open the ICW** and follow the prompts:

The screenshot shows the top navigation bar with links: Dashboard, Email & Reminders, **Contacts**, Market My Listings, Search MLS, Create Marketing, Admin, and Help. Below the navigation is the name 'Barry Buyer'. A light blue notification box contains the following text: 'This is a new contact from your website. Use the Initial Contact Wizard (ICW) to walk you through following up with this new contact. **According to NAR**, there is a 72% success rate of turning a web contact into a client if live contact is made within the first hour after the contact's visit. After 4 hours, the chance drops to 29%.' At the bottom of the notification box, there is a button labeled 'Open the ICW.' which is highlighted with an orange border.

4. The ICW provides you with a suggested script for the first phone call or email, depending on the contact information provided by the lead.
  - a. If the lead provided a phone number, ICW displays call scripts and suggested next steps.
 

*Note: eEdge recommends you contact them by phone; it's the fastest and most direct way to make contact. If they do not answer the phone, choose an appropriate follow-up step.*

Initial Contact Wizard

Call Barry at 512-111-1111 (home).

**Explain how you obtained Barry's phone number.**

Example: *Hi, my name is Annie Agent Team. I am calling today because you signed up yesterday on our real estate website, edger.kwrealty.com.*

**Encourage Barry to meet you in person.**

Example: *I see you saved a few homes. When would you like to go out and see them in person? I have two slots available: [day and time] or [day and time]. Which time works best for you?*

Example: *I noticed you are looking to move to this area. Do you have any house hunting trips planned? I'll be happy to show you a few homes when you come out to visit.*

What was the outcome of this phone call?

[This contact needs immediate help.](#) Mark this contact as Hot and record that I made this phone call.

[This contact plans to look for homes later.](#) Mark this contact as Active and create a reminder to call again.

[This contact was not home.](#) Mark this contact as Retry and create a reminder to call back tomorrow.

[None of the above.](#) Take me to the contact details page to record what happened.

[I would rather email this contact.](#)

- b. If the contact did not provide a phone number, ICW displays a form email. While you do not have to edit the message, you should verify its accuracy and helpfulness based on what you know about the contact. You can add or remove listings and make minor text edits as needed. When you've finished your edits, click the **Send** button.

Initial Contact Wizard

**Subject:**

**From:** Annie Agent Team

**To:** Barry Buyer <barrybuyer@gmail.com>

**B** *I* U Paragraph ▾ Font Family ▾ Font Sizes ▾ ↶ ↷

▾ ▾ Contact Details ▾

I wanted to touch base and see how your home search is going. Did you come across anything interesting?

Our home alerts feature will let you know about homes for sale the same time I hear about them. Please let me know if you need help signing up for your targeted home alerts.

My phone number and email are below if you need to get in touch. Have fun searching!

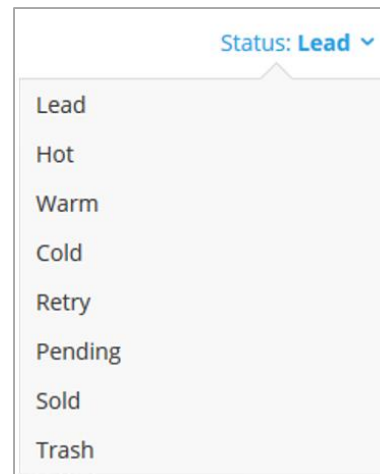
**Change contact status to "Retry" after sending email.**

## Assigning Contact Status to New Leads

5. After making the first contact, adjust the lead's status to one of those listed below. The ICW may do this for you, depending on the outcome and action you selected.

Setting a contact's status is a great way to quickly and easily identify those contacts that need your attention and are most likely to become clients. Changing the status type as you work with your contacts will help you prioritize your tasks.

- **Lead:** Default status that is applied to new leads that come into your eEdge Dashboard
- **Hot:** Leads that are ready to buy or sell now (in 30 days or less).
- **Warm:** Leads who are "just looking" and/or are ready to buy or sell in the next 90 days.
- **Cold:** Leads who are not responsive or interested. *Best Practice: Review your Daily Activity email for any contacts that might be set to Cold but have returned to your website. If this happens, we recommend changing the status of re-engaged leads to "Retry" and try to reach out and engage them in a conversation.*
- **Retry:** You were not able to make contact with this person and don't know their timeframe. Or, they were a cold lead who's returned to your website.
- **Pending:** Use for buyers who've made an offer, or a listing that's gone under contract. Use this status to keep track of those contacts who are not quite active, but not quite sold.
- **Sold:** They've just completed their home buying/selling transaction.
- **Trash:** This person has asked to stop receiving emails or you have no valid contact information for them. *Note: When you set a lead to "Trash," they will no longer receive any automated system emails.*



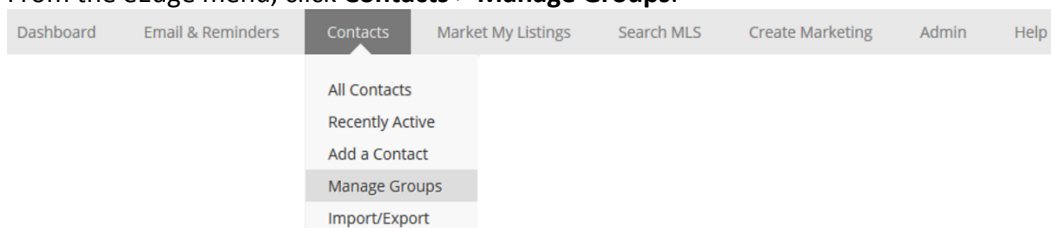
## myContacts: Your Business Is Your Database

Don't think of your database as a file, or a software program, or a simple mailing list. Your database is the record of your business successes and its potential. In other words, it is your business. You will use it to record contact information for your leads, to track your interactions with them, and to assign them to appropriate marketing plans.

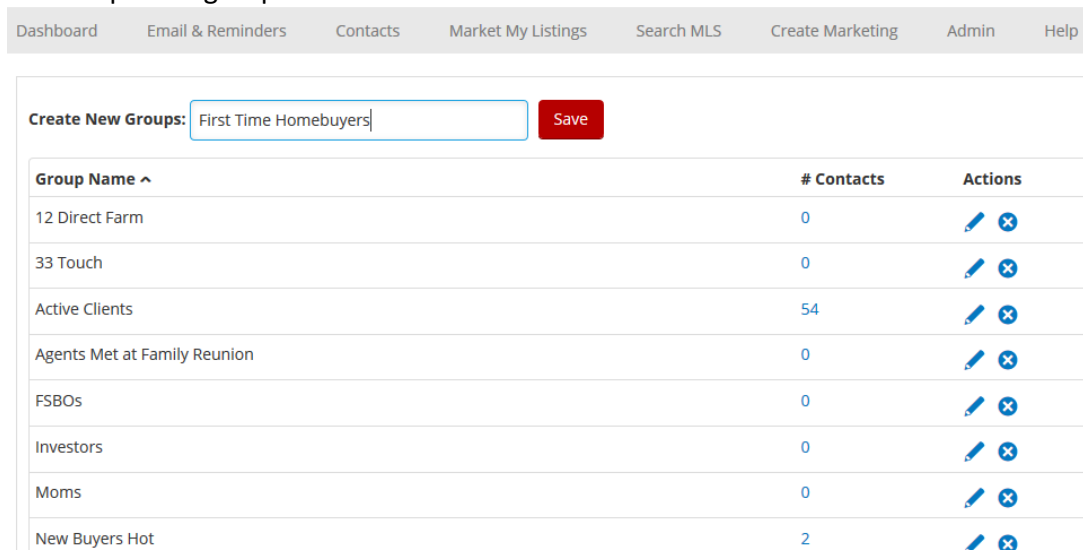
### Set up contact groups

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

1. From the eEdge menu, click **Contacts > Manage Groups**.



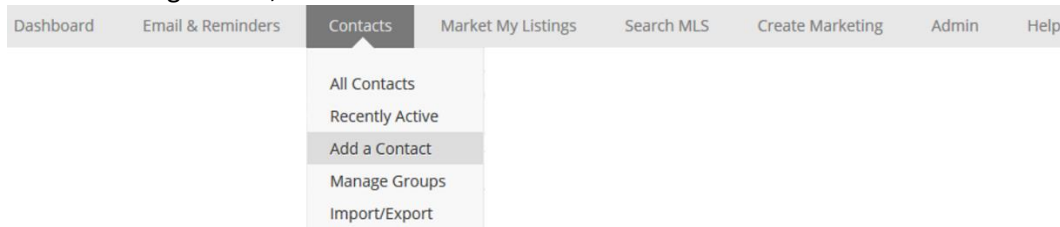
2. Type the name of your new group in the **Create New Groups** field, and click **Save**.
3. Repeat as many times as necessary until you have a label for all of your groups. You can create up to 50 groups.



## Add a new contact to your database

You can manually add contacts to your eEdge database to give them access to the listings on your website, to set them up for Listing Alerts, and to track their activity on your eEdge website.

1. From the eEdge menu, click **Contacts > Add a Contact**.



2. The Contacts page will appear, which is divided into five sections.

- a. **Primary Details:** Enter basic information about your contact, such as their name, phone number, or email address. Most fields are self-explanatory, some are specific to eEdge:
  - The **Status** field allows you to quickly identify contacts that need your attention and are most likely to become clients. *Note: When manually adding a contact, the status will default to Lead. Be sure to adjust this to identify leads you've already talked to and started to work with.*
  - **Type** indicates what type of contact they are, such as a buyer, seller, or renter.
  - **Subtype** and **Category** are free-form fields. What this means is you can develop your own subtypes and categories to help further define what type of contact this is.
  - If you enter your contact's **Birthday** or **Purchase Anniversary** date, then you'll receive a reminder 45 days before that date. You'll also be prompted to add them to a birthday or purchase anniversary campaign. This gives you a chance to send your contact a postcard or greeting card, celebrating the day with them.
- b. **Comments:** This is an open text field where you can record your notes from conversations with your contacts.

 A screenshot of the 'Add a Contact' form. At the top is a 'Save' button. Below it is a 'Primary Details' section with various input fields:
 

- Status:** A dropdown menu with 'Lead' selected.
- Name\*:** Four input fields for 'Title', 'First Name', 'Last Name', and 'Suffix'.
- Nickname/Salutation:** A text input field.
- Gender:** A dropdown menu with 'Unspecified' selected.
- Company:** A text input field.
- Job Title:** A text input field.
- Birthday:** A date picker field with 'mm/dd' format.
- Purchase Anniversary:** A date picker field with 'mm/dd/yyyy' format.
- Referral Info:** A text input field.
- Timeframe:** A dropdown menu with 'Just Looking' selected.
- Type:** A dropdown menu with 'Buyer' selected and a 'Subtype' field.
- Category:** A text input field.
- Phone Numbers:** Four input fields for 'Home Phone', 'Cell Phone', 'Work Phone', and 'Fax'.
- Email Addresses:** Three input fields for 'Primary Email', 'Secondary Email', and 'Tertiary Email', plus an '(e-Signature)' field.

 At the bottom is a 'Comments' section with a text area.

3. Scroll further down the page to view the next three sections:

a. **Address:**

- When first entering a contact, enter their primary mailing address in this section. After you've saved the contact, you'll be able to update the contact page with additional addresses.
- Fill in all the relevant fields. By selecting the box next to **Mailing Address**, you are designating this address as the one you will use to send marketing materials to this contact. In order to send print marketing materials to a contact; a street address, city, state, zip (or postal) code, and country are required.
- The **Address Title** helps you differentiate the address from others. For example, Work, Home, Second Home, Rental Property, etc.
- Next, select the property details you know about this property using the drop-down arrows.

b. **Secondary Details:** Here you can enter the name of a spouse, child, or alternate contact.

c. **Emails:** This section lets you set this contact up on a Listing Alert Campaign as well as have the system send them a Welcome Email.

- The Listing Alert Campaign is a series of three emails that encourages your contact to sign up for listing alerts. *Note: If you later set your contact up on Listing Alerts, then the Listing Alert Campaign will stop.*
- We recommend marking the checkbox to have a Welcome Email sent to your contact. This will provide them with a username and password, so they can log into your eEdge website and begin their home search.

4. Click **Save** when you are finished.

*Note: In order to save your new contact, you must complete the **Name** field and one of the following: **Email Address, Physical Address, or Phone Number.***

5. After saving your new contact, you'll see a confirmation message at the top of your screen, along with any recommendations for following up with this new contact.

▼ Address

Address Title:

Mailing Address

Address:

City:  State/Province:

Zip/Postal Code:  Country:

Property Type:  Beds:

Square Feet:  Baths:

▼ Secondary Details

Name:

Nickname:  Gender:

Relationship:  Family Members:

▼ Emails

Include this contact in the Listing Alert Campaign.

The Listing Alert Campaign is a series of three emails that encourages a contact to sign up for Listing Alerts. The text of these emails can be modified in the Admin > Email section.

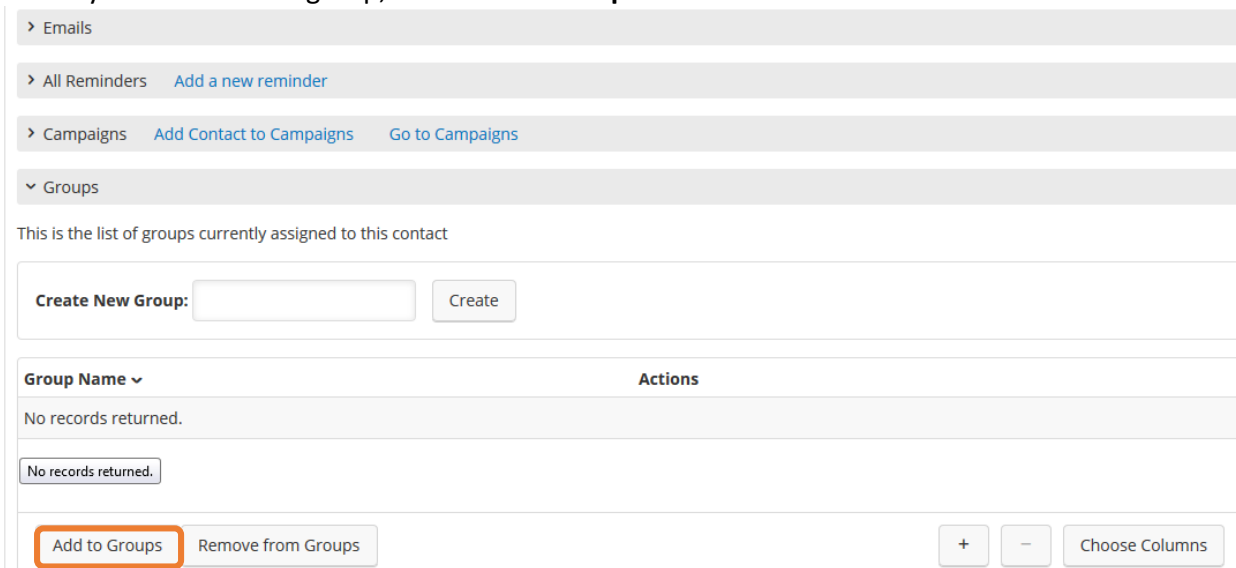
Check here to send welcome email to this contact.

Save

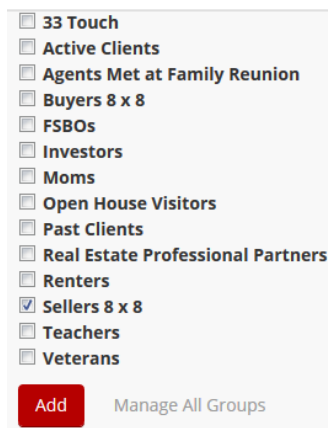
\* This field is required.  
\*\* An Email Address or Physical Address or Phone Number is required

## Add a contact to a group

1. Scroll to the bottom of your contact’s detail page and you’ll see a section called “Groups.”
2. To add your contact to a group, click **Add to Groups**.



3. Select one or more groups from the list that appears, then click **Add**.
4. You’ll receive a confirmation message at the top of the contact detail page that you’ve successfully added your contact to a group.

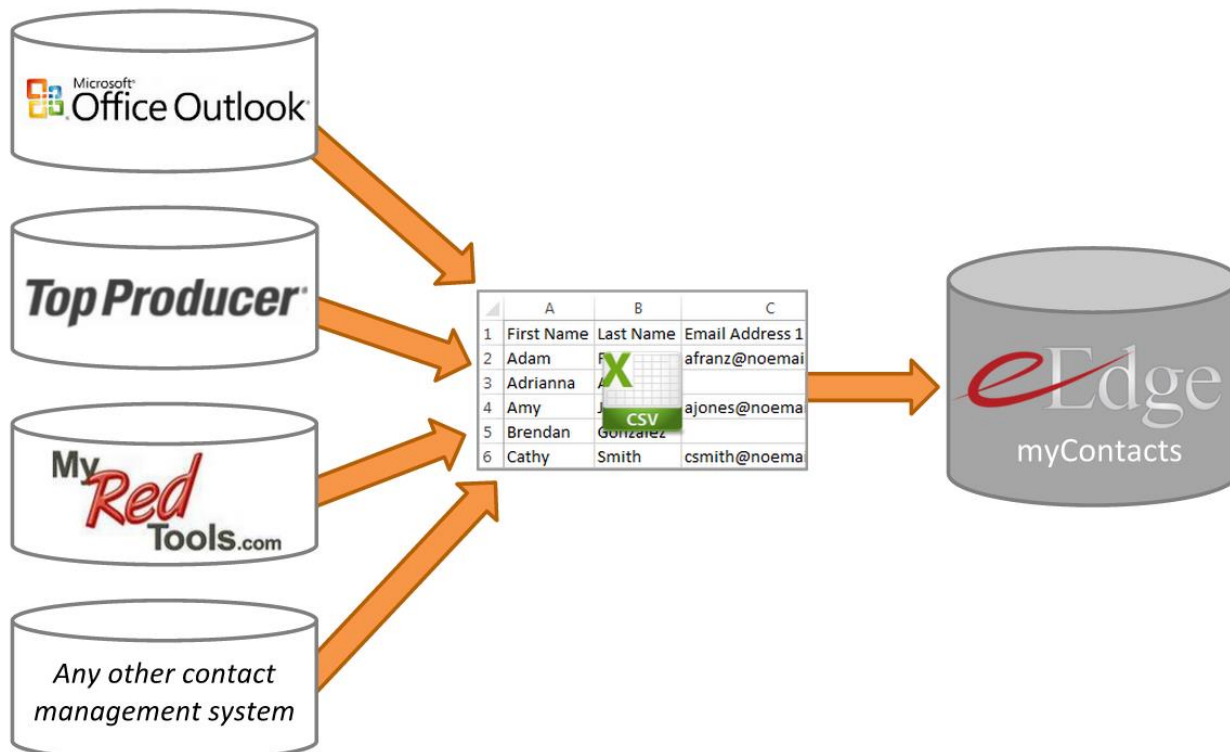




## Import a group of contacts into your database

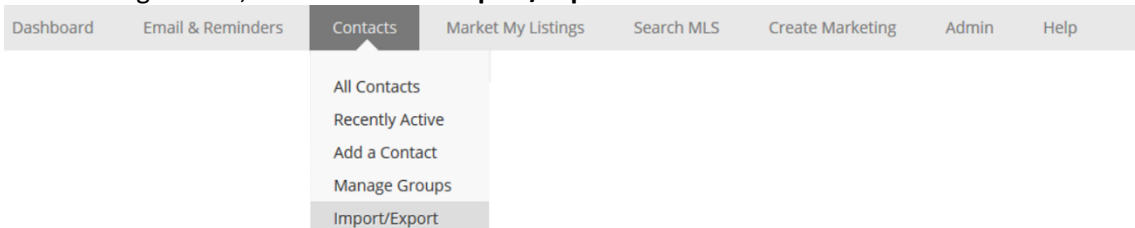
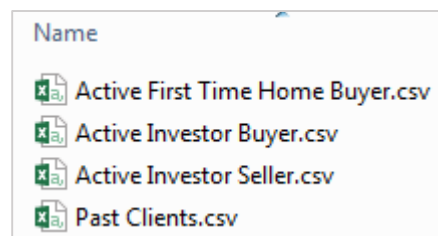
You can add a group of contacts into eEdge by queuing them for import. Before doing so, however, take time to clean up your current database so you have the cleanest, most effective book of business possible. Continue using any existing contact management system as you become familiar with the eEdge system. New leads will be funneling in to help you get used to working in eEdge.

1. As the diagram shows, you'll first export your contacts from your current system into a CSV (or Comma Separated Values) file, which is basically like a spreadsheet that you can view in Excel. Each contact management system will have its own instructions for exporting contacts.



*Note: We recommend uploading your contacts in groups (e.g., sellers, first-time home buyers, new to the area, etc.) as you get started in eEdge. This will allow for a smooth transition into the system.*

2. Once your contacts have been exported into a CSV file and you've confirmed all contacts have complete and accurate information, break the CSV into smaller files so that each file contains contacts with similar traits. This way, when you import them into eEdge, you can apply the appropriate status, type, and group label to each file you import.
3. On the eEdge menu, click **Contacts > Import/Export**.



4. This brings you to the Import Contacts screen. As you'll see on the screen, there are three steps to importing a contact file.
- Step 1: Select your type of contact list.
  - Step 2: Select your list import options.
  - Step 3: Attach and import.

### **Step 1: Select your type of contact list**

- a. If you're importing in a list of contacts that you pulled from Outlook, Top Producer or MyRedTools, select the appropriate format from the Type of File menu and read the notes displayed after doing so. Skip to **Step 2: Select your list import options**.  
If you're importing a list of contacts that you pulled from any other system (e.g., your phone, Gmail account, spreadsheet, etc.), select **Basic Contact List** from the file type menu.
- b. Click **Download Basic Contact List Template**.

The screenshot shows the 'Import Contacts' screen with a navigation bar at the top containing: Dashboard, Email & Reminders, **Contacts**, Market My Listings, Search MLS, Create Marketing, Admin, and Help. Below the navigation bar are two tabs: 'Import Contacts' (active) and 'Export Contacts'.

The main content area is divided into three columns:

- Column 1: 1. Select your type of Contact List**
  - Type of File**: A dropdown menu with 'Basic Contact List' selected.
  - Minimum Column Requirements**:
 

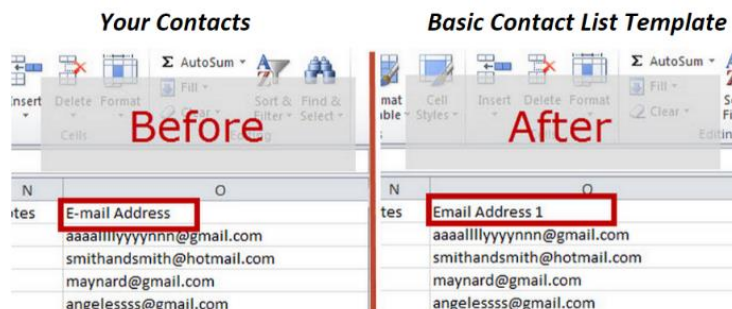
First Name	OR	First Name
Last Name		Last Name
Email Address 1		Address 1
		City 1
		State 1
		Zip 1
  - Links: [Download Basic Contact List Template](#) and [Learn More About Importing Contacts](#).
- Column 2: 2. Select your list Import Options**
  - Set contact status**: A dropdown menu with 'Hot' selected.
  - Set contact type**: A dropdown menu with 'Buyer/Seller' selected.
  - Add contacts to group (optional)**: A dropdown menu with 'Sellers 8 x 8' selected.
- Column 3: 3. Attach & Import**
  - Text: 'Before uploading your file, please be sure the contact information in each column matches the headers.' and 'If you need help with formatting the file or have additional questions, please view our training video.'
  - File selection: A 'Browse...' button followed by 'No file selected.'
  - Text: 'Maximum 5,000 contacts per upload'
  - Agreement: An unchecked checkbox followed by the text: 'I agree that these contacts have opted-in to receive email from me and are not from harvested or purchased lists. I understand violation of this policy will result in loss of email features and/or termination of my account.'
  - Button: 'Import'

- c. A file named **ml-import-template.csv** will be downloaded to your computer.
- d. Open **ml-import-template.csv** in a spreadsheet program, such as Excel, and begin adding your contacts in Row 2. *Do not change any of the text in Row 1, and do not move the sequence of the columns.* For each of the contacts you wish to import, the following columns must be complete:
  - Column A: First name
  - Column B: Last name
  - At least one method of getting in touch with each contact:
    - a. Column C: Email address **or**
    - b. Columns D-G: Physical address (street address, city, state, and zip)

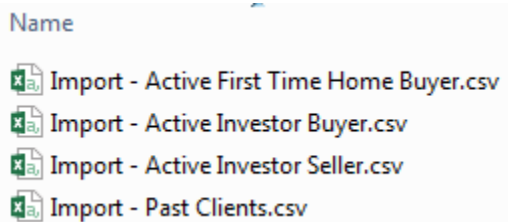
All other columns are optional.

	A	B	C	D	E	F	G
1	First Name	Last Name	Email Address 1	Address 1	City 1	State 1	Zip 1
2	Adam	Franz	afranz@noemail.com				
3	Adrianna	Aguilar		1231 Airport Blvd	Austin	TX	78701
4	Amy	Jones	ajones@noemail.com				
5	Brendan	Gonzalez		987 5th Street	Chicago	IL	60604
6	Cathy	Smith	csmith@noemail.com				

- e. Open the contact list that you exported so that you have both files open side-by-side.
- f. Copy the columns from your exported list and paste them into the corresponding columns in the template. If there is not an exact corresponding column in the template for one of your exported columns, you'll need to either select a similar column heading or manually enter that information after you've completed the import process.



- g. Once your contacts from your export file are copied into the template, save the template with a name indicating the status, type, and group to ease the import process. Repeat this as many times as needed for each of your exported files, and be sure to save them in CSV format.



- h. Check each of your import files against the guidelines below:
  - Required columns are complete and accurate
  - No duplicate email addresses
  - Maximum of 5,000 contacts per import file

First 5 rows of data must be complete

	A	B	C	D	E	F	G
1	First Name	Last Name	Email Address 1	Address 1	City 1	State 1	Zip 1
2	Adam	Franz	afranz@noemail.com				
3	Adrianna	Aguilar		1231 Airport Blvd	Austin	TX	78701
4	Amy	Jones	ajones@noemail.com				
5	Brendan	Gonzalez		987 5th Street	Chicago	IL	60604
6	Cathy	Smith	csmith@noemail.com				

## Step 2: Select Your List Import Options

- Select the **contact status** and **contact type** using the drop-down menus. These values will be applied to every contact in your import file.
- Optionally, apply a **group** label to your import file. *Note: If a contact belongs in more than one group, you can add them to additional groups after you import them.*

Dashboard Email & Reminders **Contacts** Market My Listings Search MLS Create Marketing Admin Help

Import Contacts Export Contacts

1. Select your type of Contact List

Type of File  
Basic Contact List

Minimum Column Requirements

First Name	OR	First Name
Last Name		Last Name
Email Address 1		Address 1
		City 1
		State 1
		Zip 1

Download Basic Contact List Template  
Learn More About Importing Contacts

2. Select your list Import Options

Set contact status  
Hot

Set contact type  
Buyer/Seller

Add contacts to group (optional)  
Sellers 8 x 8

3. Attach & Import

Before uploading your file, please be sure the contact information in each column matches the headers.

If you need help with formatting the file or have additional questions, please view our training video.

Browse... No file selected.

Maximum 5,000 contacts per upload

I agree that these contacts have opted-in to receive email from me and are not from harvested or purchased lists. I understand violation of this policy will result in loss of email features and/or termination of my account.

Import

## Step 3: Attach and Import

- In the last column, click **Choose File**, find the file on your computer, and click **Open**.
- After you have selected your file, the check box for the disclaimer will become available. Review the disclaimer and then click the check box.
- Click **Import** to start the import process.

Dashboard Email & Reminders **Contacts** Market My Listings Search MLS Create Marketing Admin Help

Import Contacts Export Contacts

1. Select your type of Contact List

Type of File  
Basic Contact List

Minimum Column Requirements

First Name	OR	First Name
Last Name		Last Name
Email Address 1		Address 1
		City 1
		State 1
		Zip 1

Download Basic Contact List Template  
Learn More About Importing Contacts

2. Select your list Import Options

Set contact status  
Hot

Set contact type  
Buyer/Seller

Add contacts to group (optional)  
Sellers 8 x 8

3. Attach & Import

Before uploading your file, please be sure the contact information in each column matches the headers.

If you need help with formatting the file or have additional questions, please view our training video.

Browse... No file selected.

Maximum 5,000 contacts per upload

I agree that these contacts have opted-in to receive email from me and are not from harvested or purchased lists. I understand violation of this policy will result in loss of email features and/or termination of my account.

Import

- If your import file has been prepared correctly, you'll see a message at the top of the page indicating that you've successfully imported your contacts. What this actually means is that they've been entered in a queue to be uploaded. All import files—regardless of size or number of records—will be put into a queue.

- e. Please do not navigate away until you receive the message that your file is successfully queued for import. If you see any error message, you will need to review your file to make sure that it has been prepared correctly.
- f. You can check the status of your job in the “Status of Imported Contact Lists” section further down on the Import/Export screen. When the status changes to “Complete,” your contacts have been added. If a contact in your file cannot be imported for any reason, you will be alerted by the system.

Status of Imported Contact Lists

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

Status	Job Start Date ^	Job End Date	Agent	Imported	Failed	Actions
Waiting to run...	10/28/15 4:31 PM		Annie Agent Team			
Complete	10/6/15 3:57 PM	10/6/15 4:00 PM	Annie Agent Team	6	0	
Complete	10/7/15 2:27 PM	10/7/15 2:30 PM	Annie Agent Team	6	0	

## Export a group of contacts

Should you ever need to pull a list of your contacts out of eEdge, you can use the Export function.

1. On the eEdge menu, click **Contacts > Import/Export** and select the **Export Contacts** tab.
2. If you have a large number of contacts to export, try exporting them in groups, according to contact status and group label.
3. Click **Export** when ready.

**Export contacts to CSV file**

Note: Large lists with 10,000+ contacts may take longer to export: consider exporting contacts by status.

**Contact Groups** Agents Met at Family Reunion (groups will not be listed in CSV file)

**Contact Status** All

**Export**

**Exported data information**

The exported data will be in the following order: First Name, Last Name, Nickname/Salutation (Primary), Home Phone, Work Phone, Cell Phone, Email Address 1, Email Address 2, Email Address 3, Moving From, Looking In, Average Price, Status, Date, Agent, Primary Email Working, Email Working 2, Email Working 3, Has Agent, Requested Pre-Approval, Has Mortgage Lender, Has Listing Alerts, Total Properties Viewed, Timeframe, Source, Address Title 0, Mailing Address 0, Address 0, City 0, State 0, Zip 0, Address Title 1, Mailing Address 1, Address 1, City 1, State 1, Zip 1, Address Title 2, Mailing Address 2, Address 2, City 2, State 2, Zip 2, Address Title 3, Mailing Address 3, Address 3, City 3, State 3, Zip 3, Address Title 4, Mailing Address 4, Address 4, City 4, State 4, Zip 4, Registered From Agent Site, Credit Rating, Referral Zip, Contact Type, Contact Subtype, Category, Secondary Title, Secondary First Name, Secondary Last Name, Secondary Suffix, Secondary Nickname, Secondary Relationship, Secondary Gender, Secondary Family Members, Birthday, Anniversary, Referral Info, Company, Buyer Request Area 1, Buyer Request Add, Comments 1, Buyer Request Area 2, Buyer Request Add, Comments 2, Comments

## myMarketing: Set It and Forget It Communication Systems

myMarketing is a world-class design tool allowing you to quickly and easily create high-end marketing pieces—from listing presentations to property fliers to fully automated touch campaigns. It is seamlessly integrated with myContacts, KWLS, and other KW systems to make marketing a snap.

Your marketing design library contains materials to help you cultivate new leads, win business, promote your listings, and stay in touch with past clients so you can generate repeat business and referrals.



### Touch Campaigns

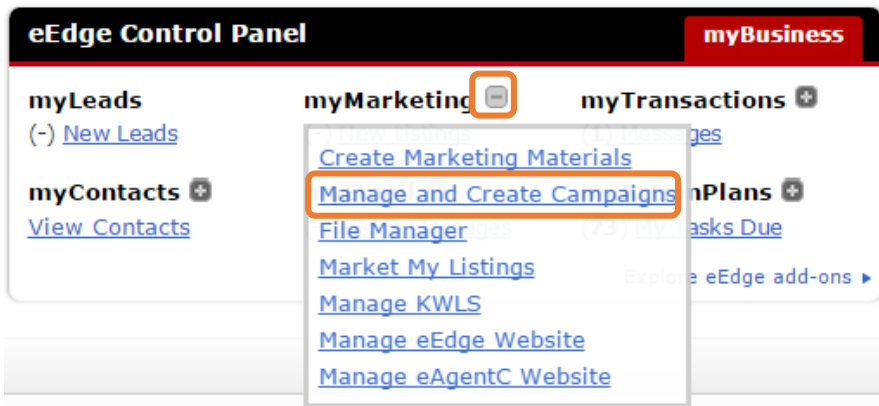
myMarketing offers automated touch campaigns that make it easy for you to systematically market to your database. The campaigns consist of a combination of phone call reminders and graphically appealing pieces that can be emailed or sent via direct mail. Each touch contains timely, relevant, and valuable information for buyers and sellers in the market of the moment.

Consistent with the Lead-Generation Database Model presented in *The Millionaire Real Estate Agent*, there are three types of campaigns available to you in eEdge myMarketing:

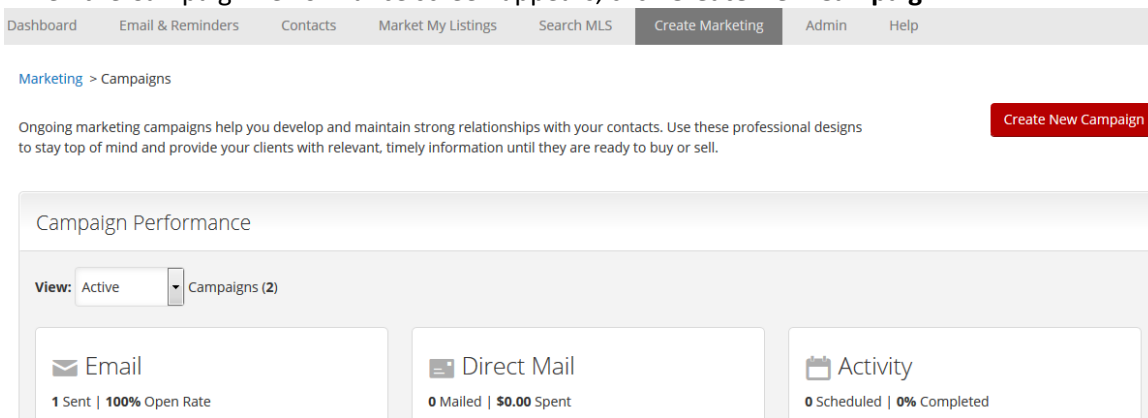
Campaign Type	What it contains	When to use it
<b>8 x 8</b>	8 touches over 8 weeks	To cement relationships with new contacts in your database
<b>33 Touch</b>	33 touches over 1 year	To strengthen relationships with your contacts
<b>12 Direct</b>	12 touches over 1 year	To create an awareness of your brand among people in your target market (e.g., farm or past clients).

## Launch a New Campaign

1. Log in to **mykw.kw.com**.
2. In your eEdge Control Panel, expand the **myMarketing** menu and select **Manage and Create Campaigns**.



3. When the Campaign Performance screen appears, click **Create New Campaign**.

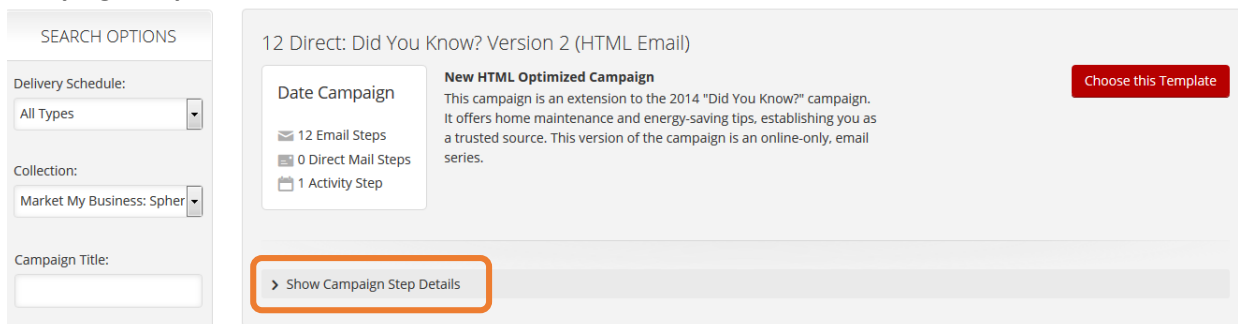


4. You'll see a list of all available prebuilt campaigns, as well as three search options (on the left side of the screen) so you can filter the list. Select one or more search options to find the right campaign for your message, then click **Search**.

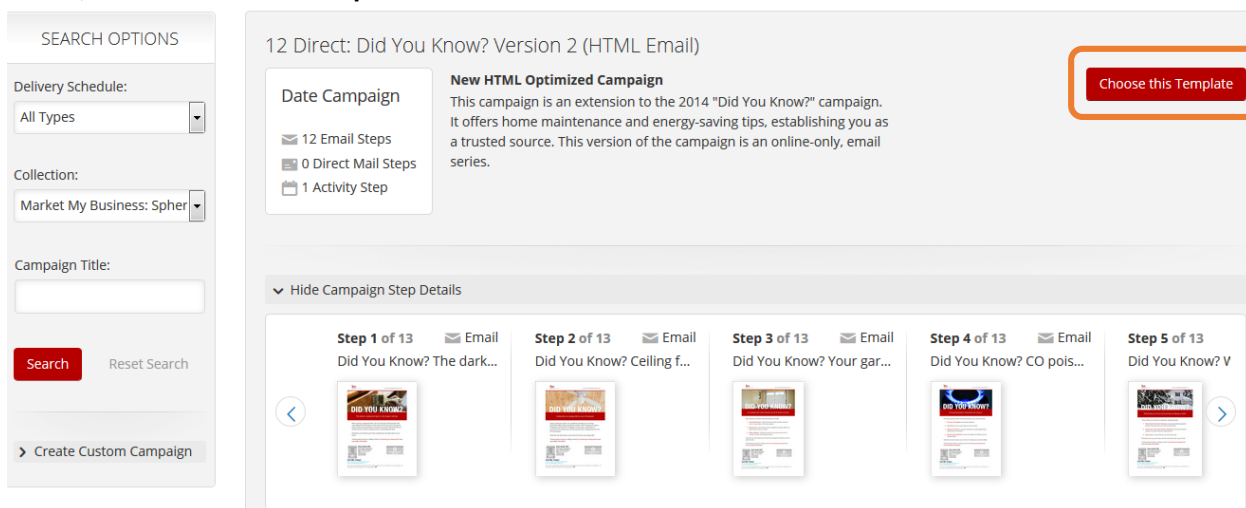
<p><b>SEARCH OPTIONS</b></p> <p>Delivery Schedule:  <input type="text" value="All Types"/></p> <p>Collection:  <input type="text" value="All Collections"/></p> <p>Campaign Title:  <input type="text"/></p> <p><input type="button" value="Search"/> <input type="button" value="Reset Search"/></p>	<p><b>Delivery Schedule</b> – There are several types of delivery schedules:</p> <ul style="list-style-type: none"> <li>• <b>Date Campaign:</b> Each touch is sent on a specific calendar date.</li> <li>• <b>Interval Campaign:</b> Touches are sent based on a specific number of days between delivery dates.</li> <li>• <b>Birthday and Anniversary Campaign:</b> Touches are sent on the dates saved in contacts' Birthday or Purchase Anniversary fields</li> </ul> <p><b>Collection</b> – Campaigns that are similar in target audience (e.g., buyers, sellers, and sphere) in are grouped together into sets called "collections."</p> <p><b>Campaign Title</b> – If you know the name of a specific campaign, you can enter all or part of it here. <i>Note: This feature is available only for prebuilt campaigns, not custom campaigns.</i></p>
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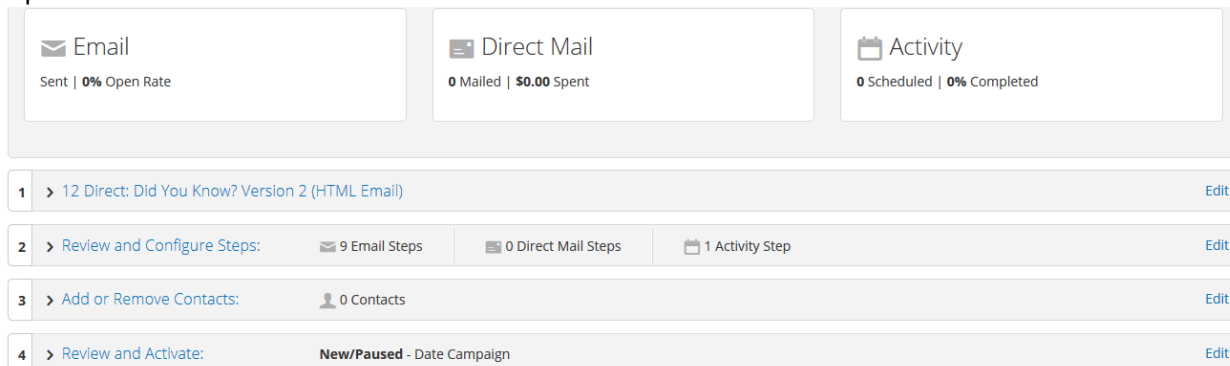
- In the list of results, you can preview the specific touches in any campaign by clicking **Show Campaign Step Details**.



- You'll see a thumbnail of each touch and its delivery method. When you find a campaign you want to use, click **Choose this Template**.



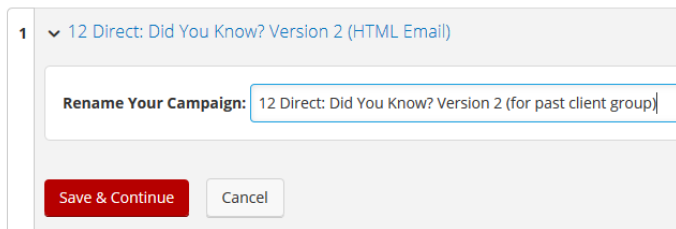
- After choosing your template, you'll see this campaign overview screen. This will later serve as your performance dashboard for your campaign after you launch it, as indicated by the metrics across the top of the screen.



- Click **Edit** in any of the four areas listed to customize your campaign.

### 1: Edit the Campaign Name

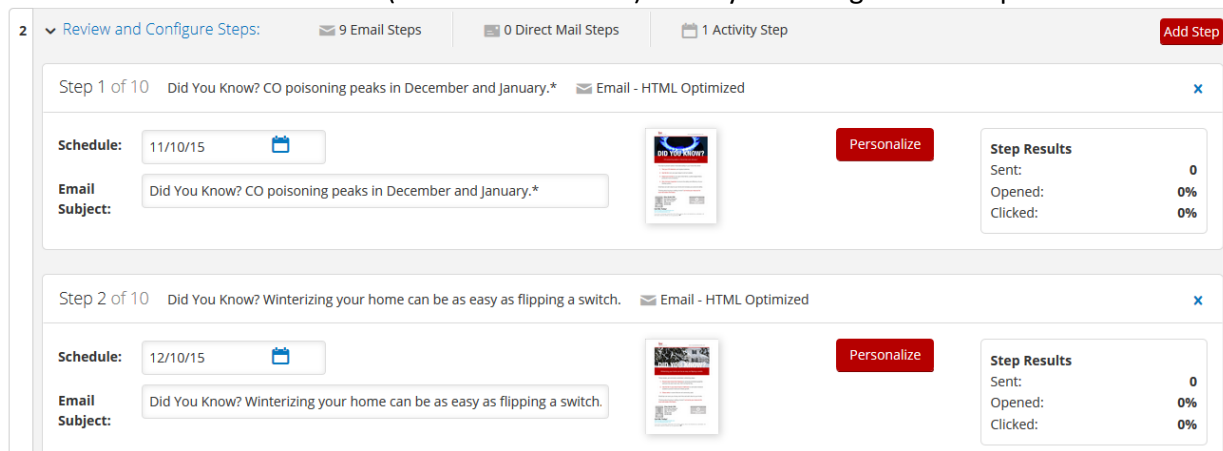
Allows you to customize the name of your campaign so you can easily identify it later. Click **Save & Continue** after making a change to the name.



### 2: Review and Configure Steps

You can personalize any of the existing steps (touches), remove touches, or add new touches.

- You can adjust the email subject line as well as the delivery date of each touch.
- For instructions on personalizing the contents of a touch using the eEdge marketing design editor, skip to page 36.
- Click **Save & Continue** (after the last touch) when your changes are complete.



### 3. Add or Remove Contacts

On this screen, you can select all eligible contacts, or select certain contacts based on a filter. You can filter on contact name, email, Status, Group, or a combination of filters.

As you set your filters, the left-hand column will display all contacts that are eligible to receive all of the pieces included in your campaign.

- If your campaign includes only email touches, then you will only see contacts that have a valid email address *and* have not unsubscribed from marketing.
- If your campaign includes any direct mail steps, you will only see contacts that also have a valid mailing address.

#### Notes:

- *If you think a contact is missing, go to the contact's summary page to complete their contact information so they are eligible to receive the campaign.*
- *There is a maximum of 2,000 contacts per campaign.*

After applying the filter, **Add** the contacts you wish to include in the email, then click **Save & Continue**.

The screenshot displays the 'Add or Remove Contacts' interface. At the top, it shows '35 Eligible Contacts' and a 'Show only eligible contacts' checkbox which is checked. A red button labeled 'Add All Eligible Contacts' is visible. Below this, two contact entries are shown:

Name	Email	Address	Group
Adam Franz	afranz@noemail.com	Austin, TX 78701	Other
Amy Jones	ajones@noemail.com	Austin, TX 78701	Other

On the right side of the interface, there are buttons for 'Contacts Added to List', 'Save & Continue', and 'Remove All'. A 'Clear Filters' button is also present at the top right. A dropdown menu for 'Groups' is open, showing a list of categories with checkboxes next to them: Moms, Open House Visitors, Past Clients, Real Estate Professional Partners, Renters, and College & U.

#### 4. Review and Activate

Your campaign will remain inactive (it will not start) until you check the box to acknowledge that you've reviewed the campaign and associated terms and conditions.

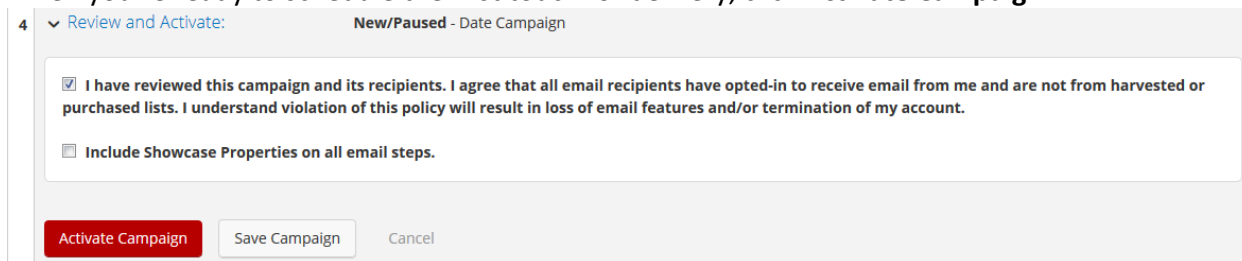
If you would like Showcase Properties included on each email piece, mark that check box as well.

- The **Showcase Properties** feature allows you to spotlight specific properties that you've selected as your featured listings (in the "Market My Listings" section of eEdge). This is a great way to market and share your active MLS listings or to showcase listings that aren't on the MLS, such as a FSBO or pocket listing.
- If you have more than three properties selected, the system will randomly select three showcase properties to feature on your email marketing.

You can then click either:

- **Activate Campaign:** The steps will be scheduled for delivery on their respective due dates and your campaign will automatically be saved in My Saved Campaigns (for access later).
- **Save Campaign:** Save it to be started later. You can access it from "My Saved Campaigns."

When you're ready to schedule the first touch for delivery, click **Activate Campaign**.



The screenshot shows a web interface for reviewing and activating a campaign. At the top, it says "4 Review and Activate: New/Paused - Date Campaign". Below this, there are two checkboxes. The first checkbox is checked and contains the text: "I have reviewed this campaign and its recipients. I agree that all email recipients have opted-in to receive email from me and are not from harvested or purchased lists. I understand violation of this policy will result in loss of email features and/or termination of my account." The second checkbox is unchecked and contains the text: "Include Showcase Properties on all email steps." At the bottom of the form, there are three buttons: "Activate Campaign" (highlighted in red), "Save Campaign", and "Cancel".

You will see a message confirming that your campaign was successfully activated.

## Using the Marketing Design Editor

The design editor within myMarketing allows you to personalize any design before you send it so that you can tailor it to match your contacts' unique needs as well as your unique brand.

1. After you select a design you want to customize—whether it's part of a campaign or a stand-alone piece—click the red **Personalize** button next to the preview of the design.
2. The marketing design editor will open, presenting you with an array of tools with which to personalize your design.

### *Marketing design editor basics*

No matter what type of design you are editing, the editor has four primary areas:

1. **Main toolbar:** The toolbar is available with every design and will provide you with the tools necessary to start customizing your design.
2. **Page navigation:** Allows you to navigate between pages in a multi-page document, such as a postcard or guide.
3. **Design elements:** An element refers to a text box, image, map, or shape that is part of your marketing design.
4. **Pop-up toolbar:** When you have selected an object in your design, an advanced toolbar will pop up.














*Note: Pages cannot be added or removed.*

### *Working with the main toolbar*

The main toolbar will always display these buttons.



Let's go over what each button does.

 Save	<p>Select <b>Save</b> at any time while editing your marketing design. It is a good idea to save often, to ensure that you don't lose your changes. If you are saving a design for the first time, click save and name your design.</p>
 Exit	<p>If you want to close your design, click <b>Exit</b>. If you have not saved, the system will prompt you to do so.</p>
 Undo 0   Redo 0	<p>The <b>Undo</b> button allows you to quickly undo your recent changes. The <b>Redo</b> button allows you to redo something you just undid. Each button shows the number of steps that you can undo/redo. When you first start editing your design, both display a "0." As you make changes to your design, the number under the Undo button will go up. This is the number of changes you have made to your design, including images added or text you've entered.</p>
 Zoom	<p>Select the <b>Zoom</b> button to zoom in or out on your marketing design.</p>
 Image	<p><b>Image</b> will pull up stock photos, your photos, and an option to upload new photos.</p>
 Text Box	<p><b>Text Box</b> will create a blank space to type in.</p>
 Article	<p><b>Article</b> will give you a selection of prewritten content to add.</p>
 Video	<p><b>Video</b> gives you the option to add a link to a video, another great way to encourage your contacts to interact with your email marketing designs.</p>
 Map	<p><b>Map</b> allows you to provide customers with a visual, showing them the location of a property or event. With an email design, you can even make the map clickable by adding a link to it.</p>
 Shapes	<p><b>Shapes</b> will give you a variety of shapes to add a little fun and flair to your design. You can change the color and size of your shapes or even layer them to provide a background for your text.</p>
 Forward   Backward	<p>When you add a new element to your marketing design, it will be in the foreground of your piece. The <b>Forward</b> and <b>Backward</b> buttons allow you to move the elements of your marketing design in front of or behind other elements.</p> <p>This enables you to choose which part of your design you'd like to work on—as well as choose which elements will be in the background or the foreground of the design.</p>

### *Working with design elements*

Any elements that are editable in your design are listed on the right-hand side of the editor view. If you hover your mouse over any of the elements in the design or on the left-hand list, a red box will form around the element.

PERSONALIZED GREETINGS CAN BE ADDED TO THE BACK OF THIS POSTCARD.

What's the difference between homes that are "just okay" and homes that "WOW?"

STAGING

Arial - Bold Italic Font ...

your home "WOWs" which translates into more money in your pocket!

Contact me today for a free consultation on the upgrades that are most likely to have the biggest impact on the sale of your home.

And if you know anyone looking to buy or sell a home, I can certainly help with that too!

CROP AREA - DO NOT PUT IMAGES OR TEXT HERE

Elements

Postcard Front

Text Boxes

Text 1

Text 2

Text 3

Text 4

Text 5

Images

Image 1

Click to show more icons on the toolbar.

### Notes:

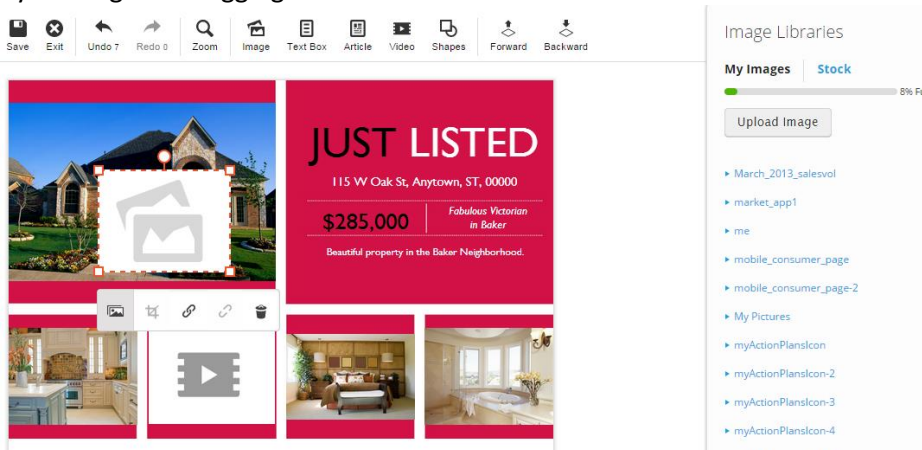
- As you add elements to your design, you'll see them appear in the corresponding category.
- To remove an element, click on the element itself, and click the trash can icon.
- If you don't see the trash can icon, click the series of blue dots on the right side of any toolbar to reveal additional icons.

The following are instructions for working with specific types of design elements:






1. **Image**

a. To add an image:

- i. Click the **Image** button in the main toolbar.
- ii. A placeholder image will be placed in your design, and the right pane of the editor becomes your library of photos and upload options.
- iii. Select an image from either the **My Images** or **Stock** image library, or click **Upload Image** to bring in an image saved on your desktop.
- iv. Once your image appears in the design, you can resize, rotate, and move your image by clicking and dragging.



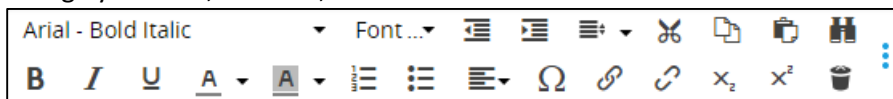
b. A pop-up editor will also appear, allowing you to edit your image a few different ways:

Image Editor Icons	
	<b>Replace Image</b> will open up the Image Library, so that you can select a different image.
	<b>Crop Image</b> allows you to crop your image to desired size.
	<b>Link</b> button allows you to add a URL link to your image to encourage your contacts to interact, When they click the image, they'll be redirected to a specific website. <i>Note: Available for email designs only.</i>
	<b>Unlink</b> your image will remove the hyperlink from the image.
	<b>Trash can</b> will cancel the request for inserting an image.



## 2. Text Box

- a. To add a text box:
  - Click the **Text Box** button in the main toolbar.
  - A text box with placeholder text will appear in your design.
- b. A pop-up editor will also appear, allowing you to customize your text. The text-editing tools function just as in a word-processing program, such as Microsoft Word. You'll be able to change your font, text size, or text color.



## 3. Article

- a. When you click the **Article** button, a list of prewritten articles appears. The articles are sorted into categories.
- b. Click on a category to expand it and see the articles for that category. You can then edit the text in the category to your liking.

The screenshot shows the software interface with a main workspace and an article library sidebar. The main workspace contains a red header with the Keller Williams logo and the text "A GUIDE TO SELLING YOUR HOME". Below the header is an article titled "Pricing Your Property" with the following content:

*This is about strategy.*

I have based your recommended price on:

- A detailed, custom market analysis
- The unique characteristics of your home and its setting
- My expertise in the real estate market

*My primary goal is to net you the most money possible.*

I believe this pricing plan, matched with my 14-step marketing plan, will draw agents and buyers to your home and position it as a highly appealing, highly competitive property.

Average Sales Price: \$  
Recommended List Price: \$

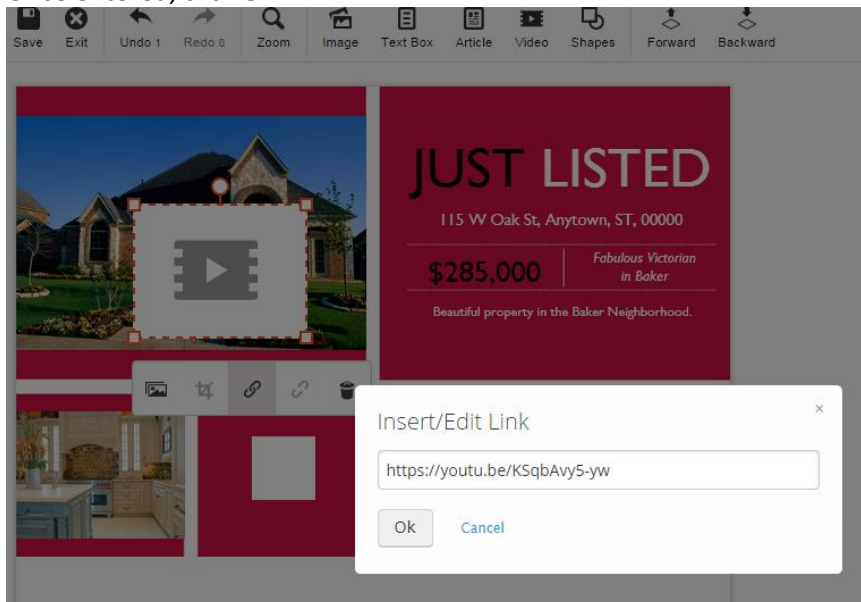
Select an article from the article library.

The article library sidebar on the right lists various categories and articles:

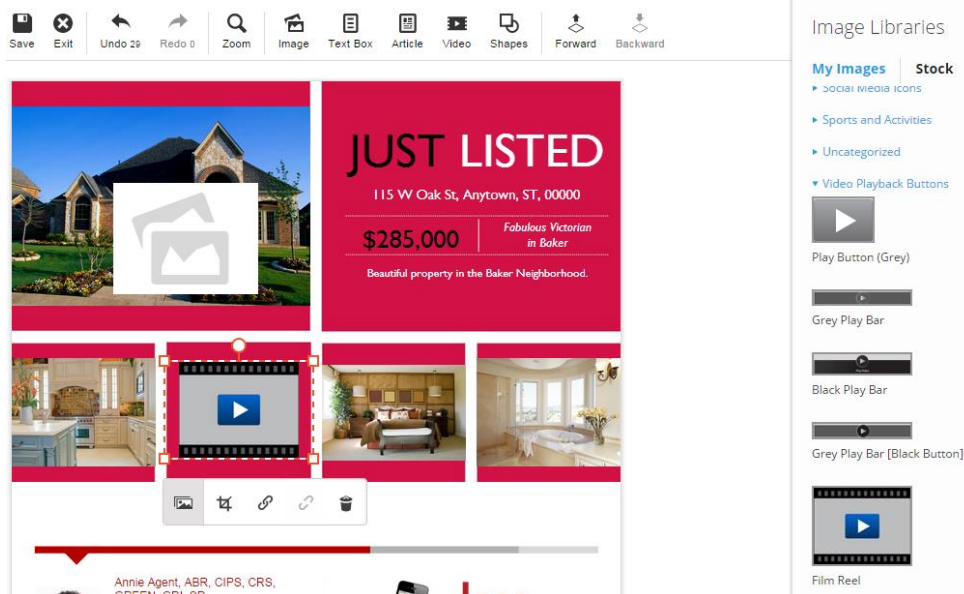
- Article Library
  - ▶ Birthday Greetings
  - ▶ Christmas Greetings
  - ▶ Financial/Mortgage
  - ▶ Health & Wellness
  - ▶ Holiday Greetings
  - ▶ Home & Garden
  - ▼ Real Estate
    - ▼ Small
      - Condo, PUD, Co-op: What's the Difference?
      - Set the Right Rent
      - Should You Rent Your Home?
      - Home Equity: How to Use It
      - Leasing with the Option to Buy
      - How to Increase Your Home's Value
      - Modular or Manufactured Housing?
      - Combat Buyer's Remorse
      - Buying Property In Mexico
      - Real Estate Trends
      - How To Buy A HUD Home

**4. Video**

- a. To add a link to a video, click the **Video** button.
- b. You'll be prompted to paste the URL, or website address, of the video that you want to link in your design. Make sure you copy and paste the full address from your browser bar.
- c. Once entered, click **OK**.

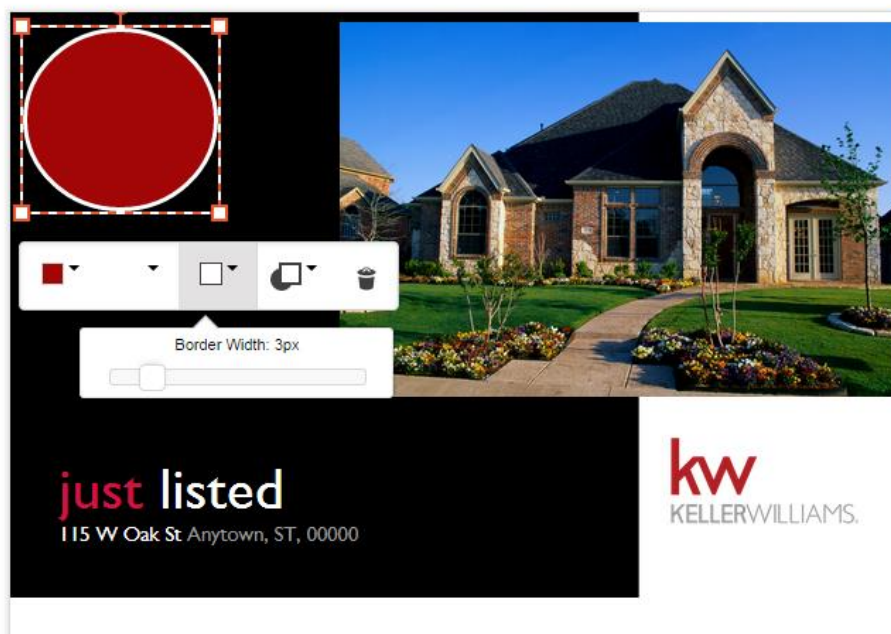


- d. A video placeholder will be placed in your design, which you can click and drag to adjust the size and position.
- e. To add a video playback button, select **Replace Image** and look in Stock Images in your Image Library, where you'll find a Video Playback Buttons category.
- f. After this design is emailed, your contacts will be able to click on it to play the video.



## 5. Shapes

- To add a shape, click the **Shapes** button.
- Select one of the three available shapes: rectangle, circle, or straight line.
- A shape placeholder will be placed in your design and the Shapes toolbar will appear.
- With the Shapes toolbar, you can:
  - Change the background and border colors, thickness and opacity. To remove the shape, click the **Trash Can** button.
  - Decide how thick the border of the shape will be. For a thicker border, **click and hold down on the slider, then slide it to the right**.
  - Determine how transparent the shape is. By default, the shape is 100 percent opaque, meaning it is solid. If you want to make the shape more transparent, **click and hold down on the slider, then slide it to the left**. Now you can layer it over another design element.



## Market Your Listings

When you enter your listing into the KWLS, we take that listing and feed it to eEdge, where you can use the listing-enabled designs. These designs automatically pull photos and listing information from one of your active listings on the MLS.

*Select and personalize a listing design*

1. From the eEdge menu, click **Market My Listings > Listings** to see all active listings associated with your eEdge account.
2. Click **Create Marketing Material** to browse the available listing-enabled designs.

MLS#	Location	Price	Listing Agent	Beds	Baths	Sq Ft	Emailed Listings	Showcase Property	Actions
9999999	721 Flushing Avenue #6B Brooklyn, NY 11206	\$450,000	Annie Agent	1	1	515	No	<input type="checkbox"/>	
9999999	25 Chittenden Avenue #5C New York, NY 10033	\$499,000	Annie Agent	1	1		No	<input type="checkbox"/>	
9999999	225 Central Park West #00 New York, NY 10024	\$7,000	Annie Agent	1	1		No	<input type="checkbox"/>	
9999999	15 West 53rd Street #19E New York, NY 10019	\$2,175,000	Annie Agent	2	2	1187	No	<input checked="" type="checkbox"/>	

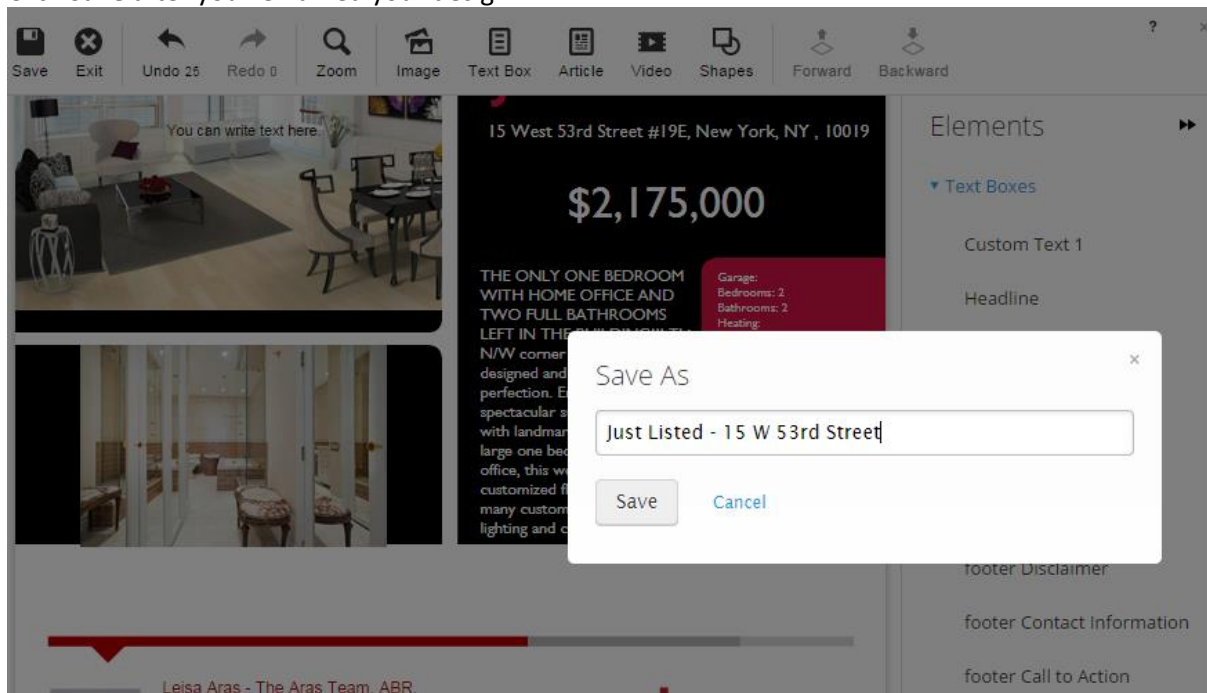
3. The screen below will appear and the “Listing Enabled Designs Only” box will be checked.
4. Select your design from those available.

- On the screen that appears, **enter the MLS number or street address** in the Choose a Listing field, and select your desired listing from the pop-up list that appears.
- Click **Personalize** to continue.

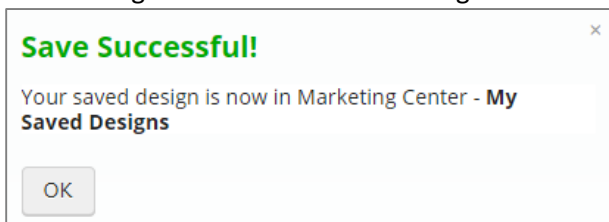
[Marketing](#) > [Search](#) > Just Listed 2

- When the Marketing Design Editor opens, you'll see that the listing information will already be added to your marketing design, but you can make changes to this information if you wish.

8. When you have finished personalizing your design, you'll need to save it.
  - a. From within the Design Editor, click the **Save** button and select **Save As**.
  - b. Name your design something relevant and easy to remember, like the address of the home you are promoting or a description of the piece.
  - c. Click **Save** after you've named your design.



9. You'll receive a message that your design was successfully saved and can be found in the My Saved Designs section in the Marketing Center. Click **OK**.

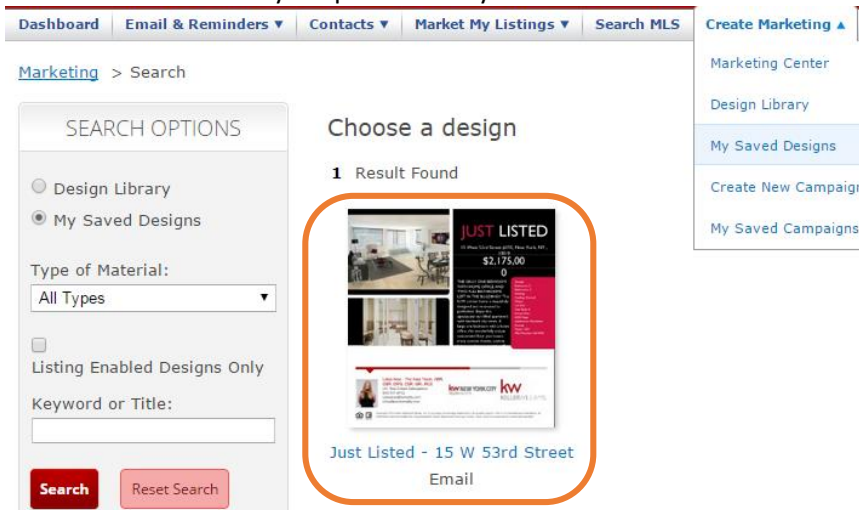


Once you customize your marketing piece, you can save it and send it to your contacts by email, you can print and hand-deliver, or you can have it professionally printed and mailed for you. This is a great resource for getting the word out when an open house or listing sells!

*Share your listing design (electronic format)*

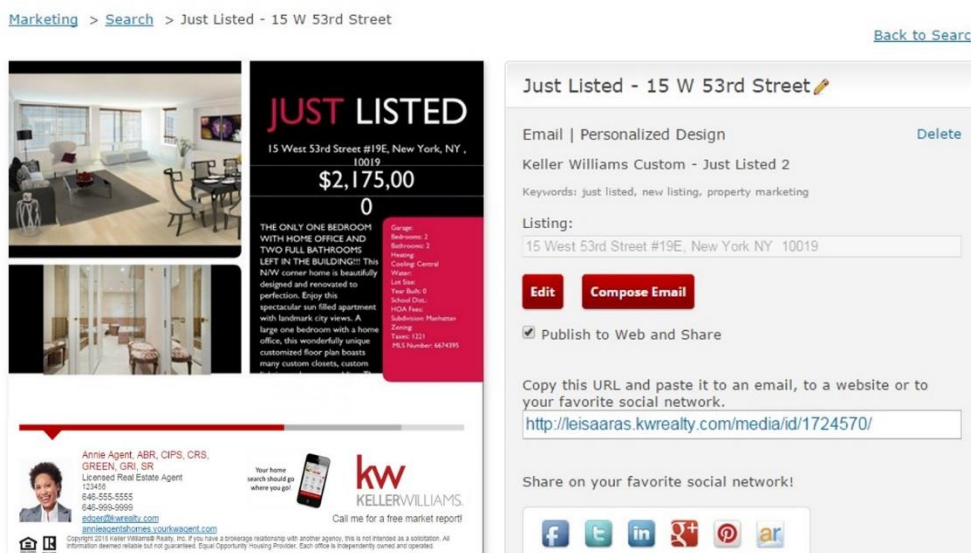
If you have an email design, you can share it electronically in several ways.

1. From the eEdge menu, Click **Create Marketing > My Saved Designs.**
2. Click the thumbnail of your piece when you see it in the results.



3. Here, you have two options for sharing the listing design:

<b>Email</b>	Click <b>Compose Email</b> and follow the prompts. The design will be included as a JPEG in the email you send.
<b>Publish to Web and Share</b>	Click the <b>Publish to Web and Share</b> box to generate a unique URL for your design that you can copy and paste into a website or your social networks.



*Share your listing design (print format)*

Virtually all designs in the eEdge Marketing Library are available in both email and print versions. Shown below is the design library filtered to show listing-enabled designs only. Under the name of each design is information to tell you if it's an email or print design, and the dimensions of the print design.

1. In the design library, select the design you wish to personalize.

Marketing > Search

SEARCH OPTIONS

Design Library  
 My Saved Designs

Type of Material:  
All Types

Listing Enabled Designs Only


Keyword or Title:

Collection:  
All Collections


[Search](#) [Reset Search](#)

### Choose a design

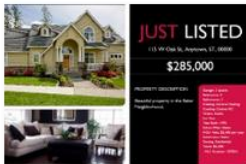
59 Results Found Sort: Title (A-Z)




Just Listed 1  
Postcards 8.5" x 5.5"





Just Listed 1  
Email



Just Listed 2  
Postcards 8.5" x 5.5"








2. On the next screen, click **Personalize** to open the Marketing Editor, make your changes, and save the edited design.
3. You'll return to the screen below, where you have several options for printing and delivery.

<b>Download PDF</b>	Click <b>Download PDF</b> to save and print the file locally.
<b>Order Professional Printing</b>	Select "Print Mailing Addresses on Pieces" if you want that option, then click <b>Add To Cart</b> .

Marketing > Search > Just Listed - 15 W 53rd Street - postcard mailer [Back to Search](#)



Just Listed - 15 W 53rd Street - postcard ... [Delete](#)

Postcards | Personalized Design  
8.5" x 5.5"

Keller Williams Custom - Just Listed 2

Keywords: Jumbo Postcard, just listed, Print, property marketing

Listing:  
15 West 53rd Street #19E, New York NY 10019

[Edit](#) [Download PDF](#)

---

Order Professional Printing

Professional print services starting at \$0.29 ea

Print Mailing Addresses on Pieces


[Add To Cart](#)



4. If you select Add To Cart, you'll be prompted to preview and approve the design before proceeding.
  - a. Click **Preview** and ensure the design is ready for print.
  - b. Click **Approve & Continue** to continue.
5. You'll see a summary of your order as well as the total cost. If you would like mailing addresses printed on each piece, click **Choose Recipients** and select the contacts individually or by group.

[Marketing](#) > Shopping Cart

### Items in Your Cart



**Jumbo Postcard** 8.5" x 5.5" ✕

[Just Listed - 15 W 53rd Street - postcard mailer](#)

Paper: 100# Cover


Finishing: UV Coated 2 Sides

Mailing Addresses: [Choose Recipients](#)

---

Quantity: 25 x \$0.80 ea = **\$20.00**

Print fulfillment provided by:



### Shipping Summary

**Order Subtotal:**

**\$20.00**

**Checkout**

*By clicking checkout I approve these items as shown.*

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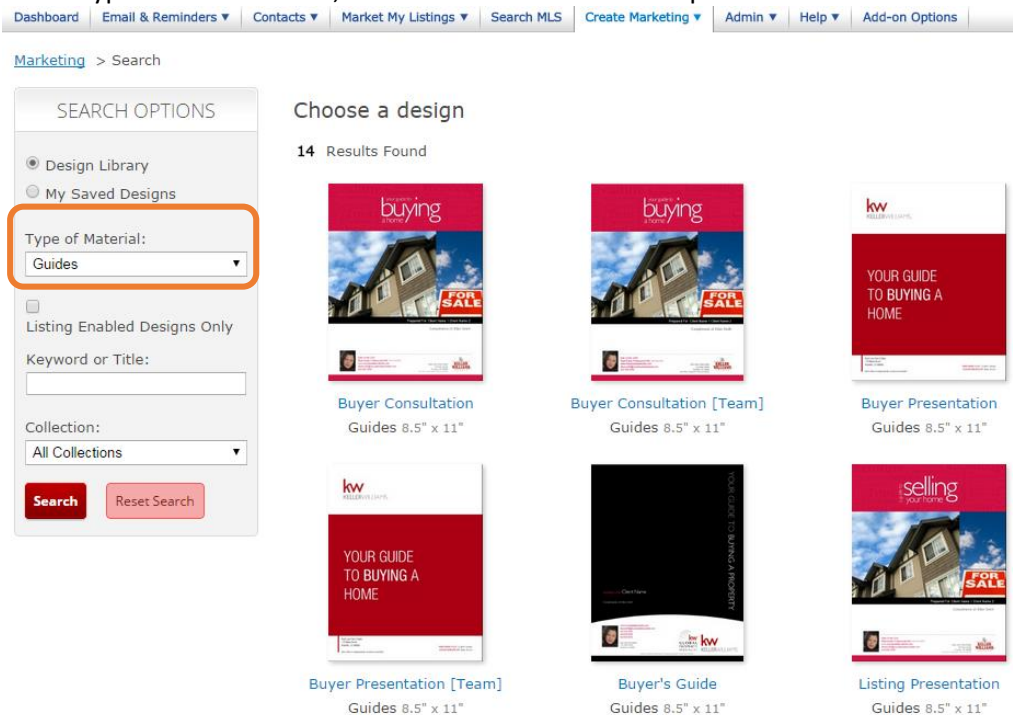
866-404-9267  
[print@marketleader.com](mailto:print@marketleader.com)  
[Pricing Guide](#)  
[Shopping Cart FAQ](#)

6. Click **Checkout** to complete the process.

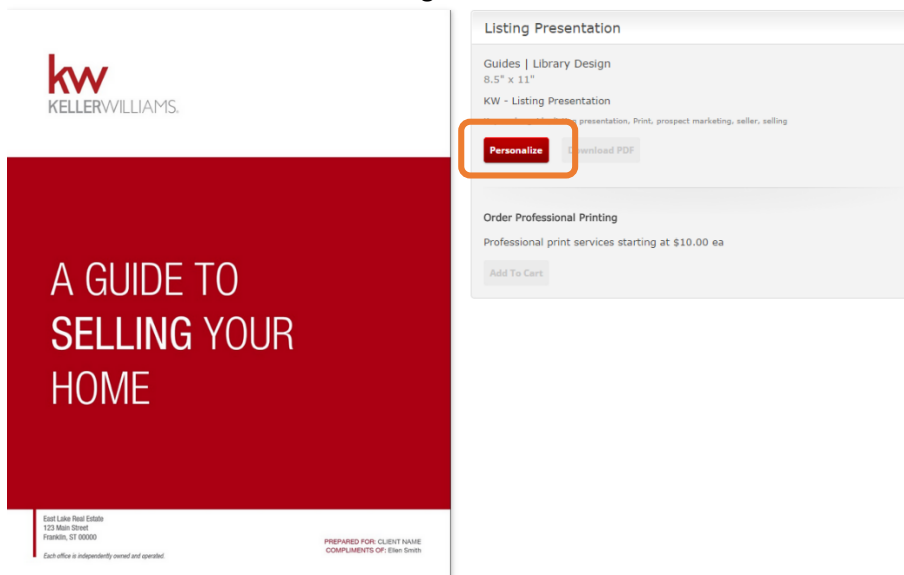
## Create Client Presentation Guides

The buyer and listing guide templates in eEdge are tools you can use throughout your client presentations to keep you on track. They enable you to take a systematic approach to working with clients—delving into their needs, wants, and values, and showcasing your services. Most importantly, these presentations will educate and set expectations for the way you work.

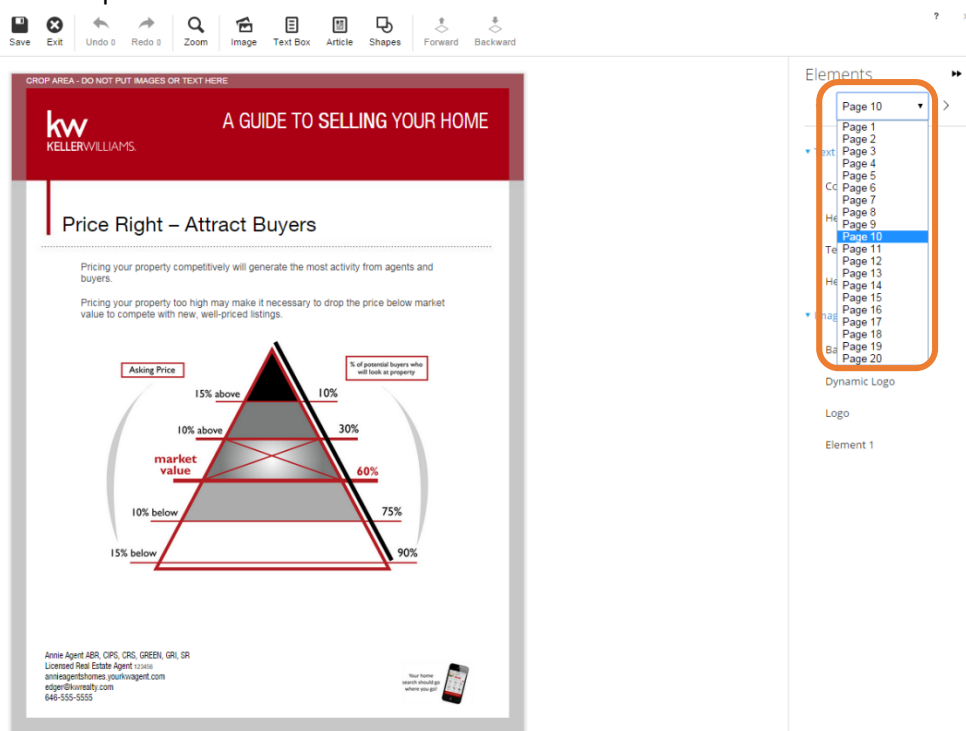
1. To browse the available designs, click **Create Marketing > Design Library** from the eEdge menu.
2. In the Type of Material field, select “Guides” from the drop-down list.



3. Click the thumbnail of the design you wish to use.
4. Click **Personalize** to customize the guide.



5. This will open the template in the Marketing Design Editor.
6. Use the page navigation controls to review and edit each page, one at a time. You'll notice placeholders throughout the guide for you to enter your clients' names, your name, and your own unique content.



7. Make any edits, referencing the section "Using the Marketing Design Editor" in this guide.
8. When you've finished your edits, save the design with a new name so you can access it later in your saved designs library.
9. After saving, exit the marketing design editor, and you'll be prompted with options for delivering your guide to your client.