PREMIER REALTY GROUP CRM

Agent Guide

For Premier Realty Group agents

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1 Welcome

The Premier Realty Group CRM keeps every client, deal, task and appointment in one place, on your computer and your phone. Changes show up for everyone who shares the book right away; there's nothing to refresh or sync.

This is the **Agent guide**. You have your **own private client book** inside Premier Realty Group: only you (and, when you allow it, the office admins) see your clients.

WORDS YOU'LL SEE

Client book	A set of clients and everything about them. Yours is private to you.
Client	Anyone in the book: leads, active buyers and sellers, past clients, and sphere contacts (friends, family, partners).
Stage	Where a client is: *New Lead* → *Nurturing* → *Active* → *Under Contract* → *Closed*, or *Lost*. *Sphere* is for people you stay in touch with who aren't clients.
Transaction (deal)	One purchase, sale or lease. A client can have several: a buyer who is also selling has two.
Checklist (playbook)	Tasks the CRM adds for you when a client changes stage or a deal gets its dates.
Timeline	The running history on each client: calls, notes, emails, stage changes.

2 What's already set up, and what you connect

READY THE MOMENT YOU SIGN IN

- Your own client book (empty, ready for your clients or an import).
- Stage checklists (playbooks) that add tasks as clients move along, and a separate checklist for each deal.
- Birthday and home-anniversary reminders, from the dates you add to each client.
- AI follow-up drafts (email or text) on every client page, up to 25 a day for each person.
- Premier Realty Tools (net sheet, mortgage, affordability, holding costs), the ARMLS login link, and your calendar link.
- Two-factor sign-in, so a stolen password alone can't open your book.

WHAT YOU SET UP YOURSELF

WHAT	WHERE	WHY
Password and two-factor	Your invite email, first sign-in	Required. Takes two minutes (next section).
Your name, signature, draft tone	**SETTINGS → MY SETTINGS**	Used on AI drafts.
Other email addresses you send from	**SETTINGS → MY SETTINGS**	So emails you send from those addresses log to the right client.
Your calendar link	**SETTINGS → MY SETTINGS → MY CALENDAR FEED**	Your appointments and tasks on your phone's calendar.
Dashboard panels and goal lines you see	**SETTINGS → MY SETTINGS → DASHBOARD**	Hide what you don't use.
CRM on your phone's home screen	Safari: Share → **ADD TO HOME SCREEN**	Opens like an app.
Import your contacts	**IMPORT CSV** in the sidebar	Bring in a Wise Agent export or any spreadsheet.
Your yearly goals	Dashboard → **SET GOALS**	Track closings, volume, commission, leads.
Your Google review link	**SETTINGS → MY SETTINGS**	Needs your own Google Business Profile (steps in "Connecting your tools").
Your website's leads	Ask Logan or Tiffany	A private lead address for your own website can be set up for your book.

3 Signing in the first time

You'll get an invite email from **crm@premierrealtyaz.com**, with this guide attached.

1. Open the email and click the link. It opens **crm.premierrealtyaz.com** on a *Welcome* screen.
2. Choose a password (at least 10 characters) and type it twice. A password manager can make one for you.

3. Turn on two-factor sign-in with your phone. **On an iPhone, nothing to install:** open the **Camera**, point it at the QR code on your computer screen, and tap **Add Verification Code in Passwords**. (Or open the **Passwords** app, find or add **crm.premierrealtyaz.com**, tap **Set Up Verification Code** and scan.) The codes then fill in on their own on your iPhone, iPad and Mac. **Any phone:** install **Google Authenticator** or **Microsoft Authenticator** (free), tap `+` and scan the code. Can't scan? Choose "enter a setup key" and type the key shown.
4. Type the 6-digit code the app shows. You're in.

EVERY TIME AFTER THAT

Enter your email and password, then the 6-digit code. **On an iPhone, iPad or Mac** it fills in for you: tap the code box and pick the code above the keyboard (or open the **Passwords** app → **crm.premierrealtyaz.com** to see it). **Other phones:** open your authenticator app and type the code for **PR CRM**. Codes change every 30 seconds; always use the one showing now.

- **Forgot your password?** Click `FORGOT PASSWORD?` on the sign-in screen. The email link lets you choose a new one; you'll still need your code.
- **New phone or deleted the app?** Ask Logan or Tiffany to reset your two-factor (they do it in `ADMIN → TEAM MEMBERS`). You'll set it up again at your next sign-in.
- **Code keeps failing?** Make sure your phone's clock is set automatically.
- **Stepped away?** After 30 minutes with no taps, clicks or typing, the CRM signs you out and clears the screen, so client details aren't left open. Just sign in again (with your code). A device you haven't used for 30 days signs itself out too.

> **TIP**
> On an iPhone or iPad, open the CRM in Safari, tap Share, then **Add to Home Screen**. It opens full-screen like an app.

4 Your book and your privacy

- Your clients are yours: other agents never see them.
- The office admins (Logan and Tiffany) can look at an agent's book only when they switch that on, and make changes only if they also switch that on. It's used to help, not to watch.
- If the office has a TC who coordinates your deals, an admin can give the TC access to your book.
- You can delete your own clients, import contacts, and use AI drafts (25 a day).
- Downloads (a spreadsheet or a full backup of your book) work when an admin has turned them on for agents.

GETTING STARTED

1. Import your contacts: `IMPORT CSV` in the sidebar (a Wise Agent export works as-is; duplicates are skipped).
2. Or add clients one at a time with + New client.

3. Set your goals on the Dashboard.
4. Add your calendar link to your phone (My settings).
5. Run Clean-up mode to fill in birthdays, addresses and past deals.

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5 Connecting your tools

`SETTINGS → INTEGRATIONS` shows each connection as **Active** (working for you now) or **Needs setup**. Set up your calendar and your email first; they take a few minutes each.

1. YOUR CALENDAR

Your appointments, tasks and deal dates on your phone's calendar, updating on their own.

1. `SETTINGS → MY SETTINGS`, the **My calendar feed** box → `GET MY CALENDAR LINK`.
2. **iPhone / Mac (Apple Calendar):** click `ADD TO IPHONE / MAC CALENDAR` and confirm **Subscribe**.
3. **Outlook:** click `ADD TO OUTLOOK`; or in Outlook, **Add calendar → Subscribe from web** and paste the link.
4. **Google Calendar:** click `ADD TO GOOGLE CALENDAR`; or in Google Calendar on a computer, **Other calendars → + → From URL** and paste the link.

> **GOOD TO KNOW**
> The link is private to you. If it's ever shared by mistake, click **Reset link**; the old one stops working.

2. YOUR EMAIL

Emails you send clients land on their timeline when a copy goes to the CRM's **log address** (shown in `SETTINGS → INTEGRATIONS` → Email logging). Follow the path for the email you use: **A. Outlook / Microsoft 365** or **B. Gmail**. If that email isn't the one you sign in to the CRM with, first add it under `SETTINGS → MY SETTINGS → OTHER EMAIL ADDRESSES I SEND FROM`, or its emails won't be recognized as yours.

A. Outlook / Microsoft 365

1. **Save the log address as a contact:** People → New contact, name *CRM log*, email: the log address.
2. **Emails you send:** show the **Bcc** line (Outlook on the web or the new Outlook: click **Bcc** at the right of the To line; classic Outlook: **Options → Bcc**) and add *CRM log*. Or make it automatic (step 4).
3. **A client email you received: Forward** it to *CRM log*.

4. **Automatic (optional):** on a **premierrealtyaz.com** mailbox, ask Logan or Tiffany to add you to the office rules. With **your own Microsoft 365** (your own domain, and you're its admin), add the two rules yourself:
   Sign in at **admin.exchange.microsoft.com** (email through GoDaddy: Email & Office → your account → Admin) → **Mail flow → Rules →** `+ ADD A RULE → CREATE A NEW RULE`.
   Rule 1, "BCC client emails to Premier CRM": Apply this rule if *The sender is* you, **+ And** *The recipient is* **Outside the organization**; Do the following: *Add recipients → to the Bcc box* → the CRM log address.
   Rule 2, "Aligned emails to Premier CRM" (if you use Aligned Showings): Apply this rule if *The sender is* **noreply@alignedshowings.com**, **+ And** *The recipient is* you; Do the following: *Add recipients → to the Bcc box* → the CRM log address.
   Next → Next → Finish, and make sure each rule is **Enabled**. They can take up to 30 minutes to start.

B. Gmail

Easiest: connect your Gmail once (recommended). Then emails to and from your clients, both ways, land on their timeline on their own every 15 minutes: no BCC, forwarding or filters, and Aligned's emails fill in your showings too. You need a Google **app password**, a 16-letter code just for the CRM:

1. Turn on **2-Step Verification** in your Google account: myaccount.google.com → **Security** → 2-Step Verification (skip this if it's already on).
2. Go to **myaccount.google.com/apppasswords**, type the name *Premier CRM*, click **Create**, and copy the 16 letters Google shows (you won't see them again).
3. In the CRM: `SETTINGS → MY SETTINGS`, the **Connect your email** box → `GMAIL`: enter your Gmail address, paste the app password (not your normal Gmail password) and click `CONNECT`. The first check looks back two weeks.
4. The box then shows *Connected*, when it last checked and how many client emails it has logged, with a short *Recently logged* list (who each one was to or from; click a name to open that client). `CHECK NOW` reads new mail right away. `RE-READ THE LAST 30 DAYS`, after adding clients, picks up their recent emails (nothing already logged doubles). `DISCONNECT` (or deleting the app password in Google) stops it anytime.

> **GOOD TO KNOW**
> The app password is stored encrypted and only used to read mail. The CRM never sends, changes or deletes your email, and only keeps emails with your clients (a short preview on their timeline). If it ever says **Needs attention**, the app password was removed or changed: make a new one and connect again.

Or, without connecting:

1. **Save the log address as a contact:** contacts.google.com → Create contact, name *CRM log*, email: the log address.

2. **Emails you send:** click **Bcc** at the right of the To line (Gmail app: tap the arrow next to *To*) and add *CRM log*. Personal Gmail can't add it automatically, so add it each time. *Google Workspace* (Gmail with your own domain): your Workspace admin can make it automatic in admin.google.com → Apps → Google Workspace → Gmail → **Routing** → add a rule for outbound mail → "Add more recipients" → Bcc the log address.
3. **A client email you received: Forward** it to *CRM log*.
4. **Aligned emails, automatically** (if you use Aligned Showings):
   a. Gmail → ⚙ → **See all settings → Forwarding and POP/IMAP → Add a forwarding address** → the CRM log address → Next → Proceed.
   b. Google sends a confirmation to the CRM, and the CRM passes it on to **your Gmail** within a minute ("Confirm Gmail forwarding to Premier CRM"). Click **Confirm forwarding** in it. (Your Gmail address must be your CRM sign-in or listed under Other email addresses I send from.)
   c. Don't turn on forwarding for all mail. Instead: Gmail search bar → the filter icon → **From:** noreply@alignedshowings.com → **Create filter** → tick **Forward it to** the log address → **Create filter**.

> GOOD TO KNOW
> A busy mailbox is read in short rounds: the first connect may say "the rest comes in over the next few checks". That's normal; every 15 minutes it picks up where it left off. After adding a batch of clients, **Re-read the last 30 days** fills in their recent emails.

> GOOD TO KNOW
> **Easiest for Outlook too:**
> `SETTINGS → MY SETTINGS → CONNECT YOUR EMAIL → OUTLOOK / MICROSOFT 365 → CONNECT OUTLOOK`, sign in and accept. Then client emails both ways (including ones you never reply to) and Aligned's emails come in on their own. If it says it isn't set up or needs admin approval, ask Logan or Tiffany.

> TIP
> Want your email's own signature (logo, photo) on CRM drafts? Tick `LET MY EMAIL APP ADD MY SIGNATURE` in My settings, and set your signature up in Outlook or Gmail for new messages and replies.

3. ALIGNED SHOWINGS

1. In Aligned Showings, open your profile settings and go to **Calendar Sync**. Tick **As a Listing Agent** and **As a Showing Agent**, then **Create Sync Link** and copy it.
2. In the CRM: `SETTINGS → MY SETTINGS → ALIGNED SHOWINGS`, paste it, click `CHECK THE LINK`, then `SAVE MY SETTINGS`. (More in "Calendar and appointments".)
3. For the showing agent's details and Aligned feedback to fill in on their own, ask Logan or Tiffany to add your premierrealtyaz.com mailbox to the Aligned emails rule, or, with your own Microsoft 365, set it up yourself (see "Automatic copies with your own Microsoft 365" above).

4. GOOGLE REVIEWS

Ask past clients for a Google review in one tap (text, email, or a QR code they scan in person). Reviews go to **your own Google Business Profile**, so you need one first.

No Google Business Profile yet? Create one (about 15 minutes, plus Google's verification):

1. Go to **business.google.com** and sign in with the Google account you want to own it (a Gmail, or a Google account made with your work email). Click **Manage now** / **Add your business**.
2. Business name: your name as an agent, e.g. *Jane Smith, REALTOR® | Premier Realty Group* (follow your brokerage's naming rules). Category: **Real estate agent**.
3. Location: choose **No** for a storefront customers visit, then add the **service areas** you work (cities or ZIPs). Your home address stays hidden.
4. Add your phone and website (your agent page or site), then **verify**: Google offers a video, phone, text or postcard. Until it's verified, the review link won't work for clients.
5. Once verified, add a photo, your hours and a short description, so the profile looks complete when clients land on it.

Connect it to the CRM:

1. On Google, search your business name while signed in to that account (or open business.google.com) → **Ask for reviews** (sometimes "Get more reviews") → copy the **Review link** (it looks like https://g.page/r/.../review).
2. In the CRM: `SETTINGS → MY SETTINGS → MY GOOGLE REVIEW LINK`, paste it and `SAVE MY SETTINGS`. Your QR code appears there with `DOWNLOAD QR CODE` for print.
3. On a past client's page, click `ASK FOR REVIEW`: text it, email it, or `SHOW QR CODE` for them to scan. It's logged, the closing thank-you task is checked off, and a "Check for their Google review" task comes up a week later.

ADDRESS SUGGESTIONS

Connected for everyone. Start typing a street in any address box (a client's home, property or mailing address, or a deal) and pick the address from Google's suggestions: the street, unit, city, state and ZIP fill in. Nothing to set up.

EVERYTHING ELSE

CONNECTION	WHEN YOU START	HOW TO TURN IT ON
Lead inbox	Needs setup	Ask Logan or Tiffany for a lead address for your book. Then set your Zillow, Realtor.com or other lead emails to forward to it, and each lead becomes a New Lead in your book.
Website leads	Needs setup	Have a website? Tell Logan or Tiffany who hosts it (e.g. Luxury Presence) so they can connect it to your book.
Backup & export	Depends	Available when an admin turns downloads on for agents.
AI drafts	Active	Nothing to do. Set your name, tone and signature in My settings.
Premier Realty Tools, ARMLS	Active	In the menu.

> **GOOD TO KNOW**
> The team's own lead address and shared Apple calendar belong to the Mom & Son book, so they aren't used for your book.

6 Getting around

New here? When you first sign in, a welcome note offers a one-minute **tour** of the real screen (**Not now** asks again at your next sign-in, up to three times; **Don't show again** stops it). Any time later: **Help** (in the menu) opens this guide, with **Take the tour in the CRM** at the top. The tour is made for a computer; on a phone the CRM is set up for the quick things (look up or add a client, today's tasks, log a call).

What's new (bottom of the menu, above Dark mode; in the menu under your initials on a phone): after each update it lists what changed for you, with **Show me** to jump there. A red dot shows until you've looked. Updates stay a week, then drop off; this guide keeps the full picture. At the bottom: **Stuck, or have an idea? Send Logan a note**. Type what you were trying to do; it goes to Logan with the page you were on.

The menu on the left (tap ☰ on a phone):

Dashboard	Your day at a glance: what's due, new leads, closings, goals.
Tasks	Every open task in the book. The red number is how many are due now.
Clients	The client book: All, Active clients, Past clients, Sphere, Lost.
Pipeline	Clients as cards by stage. Drag a card to move it. The **Documents** tab lists every open deal's required documents and what's missing.
Calendar	Appointments, deal dates. Month, Upcoming and Past views.
Marketing	Email campaigns, open house sign-in, Facebook and Instagram posts, and mailings (holiday cards with DYMO labels).
ARMLS ↗	Opens the ARMLS login in a new tab.
Tools ↗	Premier Realty Tools calculators, already signed in.
Settings	My settings, Integrations, Backup & export.
Help	Opens this guide.

Under the menu, **Quick actions** has `+ NEW CLIENT` and `IMPORT CSV`. At the bottom: dark mode and sign out.

7 The Dashboard

Your day runs across the very top: today's appointments and showings (with times), tasks due and overdue, new leads since yesterday, showing feedback to get, posts to approve, and closings this week. Each tile opens where that work is; tiles with nothing in them don't show. Then four numbers: active clients, under contract, tasks due now, and new this week. Click any of them to jump to that list. Below them, the panels (hide any you don't use in `SETTINGS → MY SETTINGS → DASHBOARD`):

Welcome back. Away 3 days or more? The Dashboard opens with a short catch-up instead of a wall of overdue tasks, the most important first:

- **While you were away**: new leads and client emails that came in.
- **Needs you first**: new leads to contact, a deal's dated steps (inspection, appraisal, closing), lender needs and client update emails, plus anything due today or tomorrow.
- **Then**: everything else that's overdue. `SPREAD THEM OUT` puts them over the next few days, about three a day, the most important first. Each is still a normal task you can change.
- **Can be skipped**: the CRM's own reminders that went past their moment (last week's update or post approval, an old birthday card). `CLEAR THEM` clears them, moves repeating tasks on to their next

date, and turns a birthday or anniversary missed in the last two weeks into a “belated” task for today. Each change is noted on the client’s timeline.

- While you catch up, “overdue” reads “to catch up” and isn’t red. **DONE CATCHING UP** closes the card (it also goes away on its own after a few days).

Closing check	Appears on a deal’s closing day (or after) while it’s still under contract: **YES, IT CLOSED**, **NEW CLOSING DATE**, or **FELL THROUGH**.
Goals	This year’s goals with progress bars and whether you’re on pace (see “Goals”).
Today’s tasks & follow-ups	Everything due today or overdue. Check a box to finish it; **+ ADD TASK** adds one.
New leads	Leads from the last two weeks (website, Zillow and other lead emails). You also get an **email the moment a lead comes in** (name, where from, their message, with Call and Open in CRM buttons); it’s noted on their timeline. Turn it off in My settings → New lead alerts.
Going cold	Active clients with no contact for a while (you choose how long in My settings).
Dates to remember	Birthdays, anniversaries and other dates in the next 30 days, with a button to make a task.
Missing details	Clients missing a phone, email, birthday or address, the **CLEAN UP CONTACTS** button, and *Possible duplicates* when someone’s in the CRM twice.
Recent activity	The latest calls, notes and changes across the book. Point at one and click the × to delete it (a test or a mistake); it asks first and also comes off the client’s timeline.
Coming up this week	Appointments plus deal dates (closings, inspection deadlines, appraisals, walkthroughs) for the next 7 days.
Deals in progress	Every open deal with its next date.
Where business comes from	Leads, closings and volume by lead source, plus top referrers.
Mailings	Mailings in progress.

8 Clients

ADD A CLIENT

1. Click **+ NEW CLIENT** (sidebar, or the red button on a phone).
2. Fill in what you know: name, phone, email, type (Buyer, Seller, Buyer & Seller, Investor, Renter), stage, lead source and agent. A spouse or co-buyer goes in the co-client fields.
3. Buyers: price range, areas, beds and baths, must-haves, financing. Sellers: the property and list price.
4. Add key dates (birthdays, anniversary, lease end…) under **DATES**; reminders come from these.
5. **ADD CLIENT**. Their page opens, and the New Lead (or chosen stage) checklist adds its tasks.

> **GOOD TO KNOW**
> If the lead source is Referral, Past Client or Sphere, a **Referred by** box appears. Pick who sent them (or add the referrer as a sphere contact). When the client closes, the referrer gets a "thank you" task.

THE CLIENTS PAGE

Tabs: **All**, **Active clients**, **Past clients**, **Sphere**, **Lost**. Search by name, email, phone, address or area; filter by type; choose a sort (each tab remembers its own). The **CLEAN UP** button (with a red count) starts Clean-up mode.

A CLIENT'S PAGE

- **Header:** name, type, co-client, and the **stage steps**. Click a stage to move them; the new stage's checklist is added (with Undo).
- **Call, Text, Email buttons.** On an iPhone, iPad or Mac they open your phone, Messages or mail. On a Windows computer, Text shows **SEND FROM MY PHONE**: a QR code you scan with your iPhone camera to open Messages with the number and message filled in.
- **Details panels:** listing details, home search, contact, key dates. Click *Edit* on any of them.
- **Transactions:** each deal with its dates (next section).
- **Missing details:** what's blank, with Add or Skip for now.
- **Log activity:** choose Note, Call, Text, Email, Showing or Meeting, type what happened (or tap **🎤 SPEAK** and say it), **SAVE TO TIMELINE**. Tick "Add a follow-up task" to be reminded.
- **Timeline:** newest first, in two tabs. **CONVERSATIONS** (what you see first): emails, calls, texts, notes, showings and feedback, review asks, cards mailed and website inquiries. **EVERYTHING** adds the automatic notes (checked-off tasks, deal and stage changes, scheduling, lead alerts). Emails show SENT or RECEIVED, who to whom, and the subject.
- **Tasks** and **Appointments** for this client (see those sections).
- **Run the numbers:** opens Premier Realty Tools with this client's numbers filled in.

- **Draft a follow-up:** AI writes an email or text from the client's details and timeline (see "AI drafts").
- **Referrals:** on a referrer's page, everyone they've sent you and how many closed.

PREFERRED PARTNERS AND VENDORS

The people you work with, on two more tabs at the top of the Clients page: **Preferred Partners** (your go-to people: the ones you trust and send clients to, whether a lender, title company or contractor) and **Vendors** (everyone else you work with: trades, services and industry contacts). Any category fits either list. They're kept apart from clients: never in the pipeline, task lists or email campaigns. Your book has its own lists.

- `+ NEW PARTNER` or `+ NEW VENDOR`: pick the type first, **Industry** (lenders, title, inspectors…) or **Contractor** (painters, plumbers…), then the category from that short list. Add the company, contact, a **direct / cell** and an **office** number, email, website, mailing address, the areas they serve (State Wide, Valley Wide, West, East or North Valley, or other places you type in) and notes ("fast on drywall patches"). Search, or filter by category (grouped Industry, then Contractor).
- Click one to see their details, what's **coming up** with them and their **history** (clients you sent them to, tasks, and deals they were on). Under their name, **Last used** shows the last time you sent them to a client or had them on a deal, so you can see who you really use. It fills in on its own.
- `SEND TO CLIENT`: pick the client, then `TEXT`, `EMAIL` or `COPY` their details. It's noted on the client's timeline ("Sent Joe's Painting").
- `+ TASK`: "Meet Joe at the Elm St rehab", with a date and time (it shows on your calendar), for a client or on its own.
- `MOVE TO PREFERRED PARTNERS` when a vendor becomes a go-to (or back to Vendors).
- On a deal's `DETAILS`, pick the **Lender** and **Title / escrow** from your partners; they show on the deal card.
- `LABELS`: holiday cards (DYMO or printed labels) for one list, a category, or both lists.

STAGES, LOST AND SPHERE

Past clients (Closed) stay in **Past clients**. If a past client starts a new deal, add the transaction and they move back to Active or Under Contract on their own. `MARK AS LOST` (bottom of the page) moves a lead that went elsewhere to Lost. **Sphere** is for friends, family and partners who aren't clients; they stay off your pipeline.

`DELETE CLIENT` removes them and their whole history for everyone in your book. It asks first and can't be undone.

9 Deals (transactions)

Every purchase, sale or lease is its own **transaction**. A buyer who is also selling has **two**: one for the home they're selling, one for the home they're buying. Each keeps its own dates and its own checklist, and they're labeled `BUYING` (blue) and `SELLING` (red) everywhere: deal cards, tasks, the calendar and the Dashboard.

ADD A DEAL

1. On the client's page, Transactions → **+ NEW TRANSACTION**.
2. Pick the side. The form changes to fit it:

SIDE	WHAT IT ASKS FOR
Buying (purchase)	Home they're buying, asking price, purchase price, contract date, inspection period ends, appraisal, final walkthrough, close date.
Selling (listing)	Home they're selling (filled in from the client's address), list date, list price, sale price, contract date, inspection, appraisal, buyer's final walkthrough, close date.
Lease	Rental address, monthly rent, date listed (if you're listing it), lease signed, move-in.

Commission can be a % of the price or a $ amount; with a %, it shows the dollar figure (e.g. "≈ $12,300 at $410K").

> **GOOD TO KNOW**
> Buying and selling? After you add one side, the Transactions box shows "+ Add the home they're buying" (or selling) until both are in.

WORKING A DEAL

- Each open deal is a card with its milestones. Tap a milestone's date (or "+ Add") to set it right there.
- Setting the **contract date** moves the deal to Under contract, and the client follows. The deal's contract and closing checklist is added, dated from *that deal's* dates. Taking the contract date off puts the deal back to Active, removes its contract steps that no one has started, and moves the client back too (unless another deal is still under contract).
- Changing a date moves that deal's tasks with it; the other deal's tasks don't move.
- **Listings** show their **days on market** (from the list date; it stops counting at the contract date) in the client's **Listing details** box and in the deal's Details.
- **REDUCE PRICE** on an active listing: type the new price (it shows the drop in dollars and percent) and an optional note. The new price shows with the original crossed out, and the timeline records each reduction with the days on market.
- **FELL THROUGH** closes the deal and removes its unfinished checklist tasks and unsent client emails.
- **Deleting a deal** (Edit → Delete) that was under contract puts the client back to Active (unless another deal is still under contract) and clears that deal's open steps, its dates on the client and its unsent client emails.
- **MARK CLOSED** (or the closing check) asks for the final close date, price and commission. When a client's last open deal closes, they move to Closed.
- **LATER** on a task that's due today or overdue puts it off without losing it: tomorrow, a week, 2 weeks or a month (it leaves today's list and comes back that day). Weekly and repeating tasks (the social approval, a seller's weekly update) offer **SKIP THIS WEEK**: this week's is cleared and next week's still

comes. The “new mailing address” task also has **NO ADDRESS YET** (asks again in a month) and **WON’T GET IT** (stops asking for 6 months).

- **Addresses follow the closing.** When a purchase closes, that home becomes the client’s home and mailing address (unless their mailing address is somewhere else on purpose, like a PO box; the timeline says it was kept). On a purchase, *This home is* can be set to **An investment property** or **A second home**: then their address stays as it is. When a sale closes and cards were going to that home, the mailing address is cleared (the new owners would get them) and a task asks for their new one, unless they’re also buying with you: it fills in when that purchase closes.
- Deal dates show once: on the Dashboard, the Calendar and the phone calendar feed, a deal’s closing (or walkthrough, inspection or appraisal) date isn’t listed again when an appointment or the checklist’s “Closing day” task already shows it that day.

CLOSING DAY

On the close date, if the deal is still under contract, the Dashboard’s **Closing check** and the deal card ask: *Did it close?*

- **YES, IT CLOSED**: confirm the numbers.
- **NEW CLOSING DATE**: pick the new date and, if you like, why. Closing tasks move with it and the timeline notes the change. It counts as an extension (below).
- **FELL THROUGH**.

EXTENDING CLOSING

Any time before closing day, **EXTEND CLOSING** (next to the deal’s **Next:** line, while it’s under contract): pick the new date and say why (servicer still reviewing, appraisal delay…). On an assumption it starts at 30 days later. The closing checklist moves with it, the timeline notes it, and the card shows **Extended 2×** with the last change; point at it (or open Details) for the whole history.

LENDER EMAILS

With Logan’s and Tiffany’s email connected, an email from a deal’s lender becomes a short note on the client’s timeline (“Lender update from …”): where the loan stands, and what the lender is waiting on. When they need something from you or the client, a **Lender needs: …** task appears on the deal. It only reads emails from the lender picked in the deal’s Details (or someone at the same company), and finds the right deal by the street or the client’s name. Loan numbers and income never go on the timeline. A lender that isn’t in the CRM (like a builder’s lender) is still caught when the email names the address of a deal with no lender picked; the note says to add them under Vendors as a Lender and pick them on the deal. A TC login that’s view-only doesn’t have its email read at all (My settings says so); an admin turning on changes for the TC starts it.

CLIENT UPDATE EMAILS

Branded emails that keep your clients posted through the deal: *You’re under contract*, *Inspection period complete* (the day after it ends), *The appraisal is done*, *Closing week is here* (5 days before), *Closing date update* (after an extension), and for assumptions *Loan docs are out to title*. Each has a buyer and a seller version. Across the top, every email shows the same steps (Under contract, Inspection, Appraisal,

Walkthrough, Closing): red with a check once done, grey until then, with the date under each one that has a date. On a cash deal, check **Cash (no loan)** in the deal's Details (a new purchase starts checked when the buyer's Financing is Cash): the emails skip the loan steps, and leave out the Appraisal step unless you also check **There's an appraisal** under it.

- When one comes up, a task appears: **Email update: "Inspection Period Complete!" to Maria**. `REVIEW & SEND` shows the email exactly as the client will see it (To, From and Subject on top).
- **Touch up the wording** changes this email only, then `UPDATE PREVIEW`. To keep your version for every deal from now on, check **Use this wording for every deal from now on** before you send. `SEND` emails the client and their spouse or co-client together; replies come back to both of you. It goes on the timeline.
- `SKIP THIS ONE` if it doesn't fit; it won't come up again for that deal. Moments more than 3 days old aren't offered.
- It's sent from your newsletter sender (Logan & Tiffany · The Mom & Son Home Team), so sending has to be on in Settings → Team settings → Email campaigns.

ASSUMPTIONS

When the buyer takes over the seller's loan. UMe (the assumption processor) does the processing; the CRM keeps your side: the facts, where it stands, and a weekly reminder.

- On a purchase or sale, open `DETAILS` and check **Assumption**; the questions below pop up (a regular deal never shows them). They're usually a **60-day closing with a 30-day extension**: an empty close date is set 60 days from the contract date when you check the box.
- The intake: loan type (FHA, VA, USDA), rate, balance, servicer, the equity gap and how it's covered (cash or a second loan), VA entitlement, the **buyer's name as UMe has it** (UMe files by the buyer's name; on a purchase it's your client, on a sale it's the other side's buyer), the processor, and notes on how it's being handled.
- The card shows an **Assumption** tag with the key facts, **where it's at** (Submitted to UMe, In review with servicer, Approved, Docs out to title, Closing scheduled; UMe's own wording shows next to it) and the last update.
- `LOG UPDATE`: pick where it's at and paste or sum up what UMe said. It goes on the timeline and the card.
- Every week while it's under contract, a task *Check UMe on (buyer)'s assumption* comes up on Friday, with `LOG UPDATE` right on it. Logging an update that week checks it off (and the week's task is skipped if an update is already in). It stops when the deal closes or falls through.

> **GOOD TO KNOW**
>
> UMe's update emails fill it in by themselves: the CRM reads the connected Outlook every 15 minutes, finds the deal by the property address in the email (UMe's subject line names it; the buyer's name is the backup), saves the update (moving where it's at forward, never back), puts it on the timeline and checks off that week's Check UMe task. An email that names no deal (or more than one) is left alone; use Log update for those. **Open in UMe** on the card goes to that loan's page in UMe's portal (it fills in from UMe's emails, or paste the page address in Details). It opens UMe's own site, so it needs **Tiffany's UMe login** (with UMe's sign-in code); everyone else sees every update right on the card.

DOCUMENTS (EACH DEAL'S FILE)

Every purchase and listing has Premier's list of required documents, kept apart from your tasks (there are a lot of them). The deal card shows **Documents 12 of 24**; tap it to open the deal's file. It turns red when closing is a week away or less and something is still missing.

- **The lists:** a listing shows the *At listing* documents, and the *Once under contract* ones from the day it goes under contract. A purchase has its own list; a home bought from the builder uses the shorter **New build** list (tick **New build** in the deal's `DETAILS`).
- Each line shows ✓ with the file (tap the name to open it), **Missing**, or **If applicable** for the "(if applicable)" ones, which only count once a file is on them.
- `ATTACH` a PDF or a photo (on a phone it can use the camera), or drag files from your computer onto a line. `N/A` takes a line off the count (`UNDO N/A` puts it back). Anything else goes under **Additional items**.
- `DOWNLOAD ALL` gives one ZIP of the deal's files, named by their line (for the broker at closing). A closed deal's file opens from its `DETAILS`.
- **Pipeline → Documents** lists every open deal with how many are in, what's missing, and the closing date; tap one to open its file.

> **GOOD TO KNOW**
>
> Signed forms from Authentisign can file themselves when your Outlook is connected (My settings): the CRM reads the property address printed in the PDF and ticks the line from the signing's name. Anything it can't match waits under **Unfiled** on Pipeline → Documents, with the likeliest deal picked: check it and tap `FILE IT`.

> **GOOD TO KNOW**
>
> Only your own book's documents are visible to you (and to the office admins). You can add documents but not delete them: brokers keep transaction records at least 5 years after closing. If something was added by mistake, ask Logan or Tiffany.

10 Tasks and checklists

CHECKLISTS DO MOST OF THE WORK

When a client changes stage, that stage's checklist adds its tasks (for example, *Active* for a seller: sign the listing agreement, disclosures, photos, sign and lockbox). Contract and closing steps (escrow, inspections, BINSR, appraisal, walkthrough, signing) wait until the deal has its contract and close dates, then appear on the right days. Admins edit the checklists.

ADD A TASK

1. `+ ADD TASK` on the Dashboard or the Tasks page (or the add box on a client's page).
2. Pick the client. For something not about a client ("Renew my license"), tick **No client**.
3. Type the task, a due date (or tick **To-do** for no date), and an optional time.
4. **For**: in your own book every task is yours.
5. Optional: which property (deal) it's about, and notes (lockbox code, where the keys are…).
6. Optional: **Repeat** (every day, week, 2 weeks, month, the same weekday each month like "first Monday", 3 months or year) and an *until* date.

REPEATING TASKS

A repeating task shows ↻ and how often ("↻ Every Monday"). There's only ever one open copy: check it off and the next one appears on its next date. If you fall behind, they don't pile up; checking off a late one jumps to the next date after today. Open the task and click `SKIP THIS ONE` to move it to the next date without marking it done. Good for things like approving the week's social posts, a monthly backup, or checking in with a past client every 3 months.

THE TASKS PAGE

Grouped as Overdue, Today, To-do, Next 7 days and Later (the next 30 days; anything further out is behind "+ more", and comes up on its own as its day gets close). `ONLY MINE` shows only what's assigned to you, `EVERYONE'S` adds your teammate's; `COMPLETED` shows what's done. Click a task's name to edit it; the × deletes it.

On a client's page, tasks due in the next week show first; *Coming up later*, *Left over from* an earlier stage (with a Clear button) and *Completed* fold away.

TASKS WITH THEIR OWN BUTTONS

- **Get showing feedback**: `ASK FOR FEEDBACK` opens an email to the showing agent. Then `ASKED, WAITING`: it notes you asked (on the timeline and the task) and moves the task two days out, so it comes back as a reminder instead of sitting overdue. `LOG FEEDBACK` when it arrives, or `NO FEEDBACK` to close it with a note. Feedback left in Aligned checks it off on its own.
- **Birthday cards and home-anniversary notes**: the task shows who to write to (the name on mailouts, like "The Lopez Family") and the mailing address, with `COPY ADDRESS`. After you mail it,

CARD SENT ✓ checks it off and logs it on their timeline. No address yet? It links to their page to add it.

- **Check for a Google review**: OPEN OUR REVIEWS, THEY LEFT ONE ✓ or NOT YET.

> **TIP**
> A task tagged BUYING or SELLING tells you which of a client's two deals it belongs to.

11 Calendar and appointments

The Calendar page shows appointments and deal dates by **Month**, **Upcoming** or **Past**. + ADD APPOINTMENT adds one (for a client). You can also add one from a client's page: Appointments → + ADD APPOINTMENT.

WHO'S GOING, AND NO DOUBLE-BOOKING

Each appointment has **Who's going**: Logan (**LA**), Tiffany (**TB**), or **LA/TB** when it isn't decided yet. It starts as you. The initials show on the calendar, on phones and on the shared Apple calendar, like "Buyer showing · Maria Lopez (LA)". Before scheduling, the CRM checks that person's time, including events added straight to the shared Apple calendar with their initials, and asks first if it's taken ("Logan already has a showing at 2:00"). You can still schedule it. FYI listing showings (another agent showing your listing; nobody from the team goes) never count.

SHOWINGS: THREE KINDS

Buyer showing	You're taking your buyer to see a home. You attend.
Listing showing	Another agent is showing your listing. Shown as **FYI · not attending**, dashed on the calendar; it doesn't count as your appointment.
Sign call showing	You're showing your own listing (from a sign call). You attend.

ALIGNED SHOWINGS

Your approved showings from Aligned come into the CRM on their own:

- **Showings of your listings** are saved on the seller as **FYI: Listing showing** (with the showing agent's email and an Open in Aligned button). A new time or a cancellation in Aligned updates it here.
- **Your buyer showings** appear on the Calendar with **Which buyer?** (Aligned doesn't send the buyer's name). Pick the buyer once and it's saved on them.
- If two of you connect Aligned and your links list the same showing, it's saved once.

AFTER A SHOWING

- **Listing showing:** a “Get showing feedback” task on the seller. On the showing, **ASK FOR FEEDBACK** emails the showing agent (filled in for you) and **LOG FEEDBACK** saves their interest and comments to the timeline. Still waiting? **ASKED, WAITING** on the task notes it and brings the task back in two days. The listing’s deal card counts showings this week and in all.
- **Aligned’s emails:** once Aligned’s emails are copied to the CRM (a Microsoft 365 rule; ask Logan or Tiffany), each showing gets the other agent’s name, brokerage and phone (tap to call or email), and feedback left in Aligned is logged on the right showing and its feedback task checked off. You don’t type it in.
- **Buyer showing:** a “How did they like it?” task. **HOW DID IT GO?** records Loved it / Liked it / Maybe / Not for them and notes; the buyer’s page lists **Homes toured**. After you save, **DRAFT A TEXT TO …** writes the buyer a short note about the homes they saw and how they liked each, with a next step (it opens their page; review it before you send).

1. In Aligned Showings, open your profile settings and go to **Calendar Sync**.
2. Tick **As a Listing Agent** and **As a Showing Agent**. For past appointments, about 30 days is plenty.
3. Click **CREATE SYNC LINK** and copy the link (it starts with webcal://).
4. In the CRM: **SETTINGS → MY SETTINGS → ALIGNED SHOWINGS**, paste it, click **CHECK THE LINK** to see what comes through, then **SAVE MY SETTINGS**.

> **GOOD TO KNOW**
> The link is private: only you can see it in your settings. Aligned updates it every few hours, and only approved showings come through. For listing showings to be recognized, keep each listing’s address on its transaction.

YOUR CALENDAR LINK

Your appointments, tasks and deal dates on your phone’s calendar: see “Connecting your tools” for the steps (Apple, Outlook or Google), right next to setting up your email.

12 Email and leads

CLIENT EMAILS ON THE TIMELINE

Step-by-step for Outlook and Gmail: “Connecting your tools”.

- When you email a client, add the CRM’s **log address** as a BCC (it’s in **SETTINGS → INTEGRATIONS** → Email logging; save it as a contact called “CRM log”). The email lands on that client’s timeline in your book, and so does their message you replied to.
- Emails from your sign-in address count automatically. Send from another address too? List it in **SETTINGS → MY SETTINGS**.
- A client email you’re not replying to: forward it to the same log address.

LEADS

Leads from your own website or from Zillow, Realtor.com and similar sites can come straight into your book once a lead address is set up for you. **SETTINGS → INTEGRATIONS** shows it as *Needs setup* until then; ask Logan or Tiffany.

13 AI drafts

1. On a client's page, **Draft a follow-up →** **DRAFT EMAIL** or **DRAFT TEXT**.
2. In a few seconds a draft appears, written from the client's details and recent timeline in your tone and with your signature (set in My settings).
3. Read it and change anything. Then **COPY**, **OPEN IN MAIL** or **OPEN IN MESSAGES** (on Windows, **SEND FROM MY PHONE** shows a QR code). **CLEAR** throws the draft away.

> **GOOD TO KNOW**
>
> Everyone can make 25 AI drafts a day (Social captions and Fresh ideas count too). The AI never invents listings, prices or dates, but always read before you send.

Listing presentation: on a seller's page, **PRESENTATION** (in Listing Details; it uses the property address, or the listing deal's) builds a branded presentation around your Cloud CMA: a cover with a photo you attach, an optional letter (**WRITE THE LETTER FOR ME** drafts it from their timeline and reason for selling; leave it empty and that page is left out), their home and goals, why us with the team's real numbers from the last 12 months, the marketing plan, an estimated net sheet (price, commission, closing costs and payoff, all changeable), your Cloud CMA, and next steps. For the Cloud CMA, **START IT IN CLOUD CMA** opens a new CMA there with the home's address, beds, baths and square feet filled in (be signed in to Cloud CMA); pick the comps and save it, make or download its PDF once, and it comes into the presentation on its own the next time you open it, right behind the "Your market analysis" page (whatever its size; a big one takes a minute). If it can't, the page says why, with **TRY AGAIN**. **OPEN IN CLOUD CMA** goes back to the same report to change it. You can also export a PDF from Cloud CMA yourself and use **ATTACH PDF** (any size). Cloud CMA's own cover page is left out, since yours goes first (a checkbox in the setup brings it back); to leave out other Cloud CMA pages for every report (its letter, bio, company and contact pages), turn them off in Cloud CMA's Customize report. Pick their loan type: FHA, VA and USDA loans add a page on how an assumable loan can help sell the home. Show it full screen on the iPad, and **PRINT / SAVE AS PDF** for the packet you leave in their binder.

Seller weekly update: on a client with an active listing, **DRAFT SELLER UPDATE** writes the week's email to the seller from the showings, the feedback you logged, days on market and price. A Friday reminder helps you send it. **DRAFT IT** on that Friday task writes the update right away on the seller's page.

Don't want AI drafting? Untick "Show AI drafting on client pages" in My settings.

14 Marketing: campaigns, open houses, social and mailings

MARKETING in the menu has four tabs: **Campaigns**, **Open houses**, **Social** and **Mailings**.

EMAIL CAMPAIGNS

Campaigns send from **your own name and domain**, so they need your own email-sending account first:

1. Create a free account at **resend.com** (free: 100 emails a day, 3,000 a month; Pro is $20/month for 50,000 if you ever need it).
2. In Resend, add your own domain (for example *news.yourname.com*) and add the records it shows you where your domain is managed (GoDaddy or similar). Wait for **Verified**.
3. Ask Logan or Tiffany to connect it to your book. Until then you can set up campaigns and send yourself tests; nothing goes to clients.

- **Drips** are a series of emails over time. ADD STARTER CAMPAIGNS adds four ready-to-edit ones: *New buyer leads*, *Seller and home value leads*, *Past clients* (a review request, a settling-in note, home value check-ins every 3 months and a home anniversary email) and *Open house visitors*. They start **off**.
- **Assumable buyers:** on a buyer, Edit → Home search → check **Interested in assumable homes**. They show on the Clients page under ASSUMABLES (the assumable buyers list), and a drip whose "Who joins automatically" is *Buyers interested in assumables* (your assumption drip) picks them up right away when you save (a message says so). Uncheck it and that drip stops for them.
- Open a campaign to edit each email (subject, message, which day it sends). Untick **Include** to leave an email out without deleting it; REMOVE deletes it. Use {first_name}, {address}, {home_value_link}, {review_link} or {agent_names} and they fill in for each person. SEND ME A TEST emails it to you first.
- **Write it with AI:** on a new drip (+ NEW DRIP), describe what it's for and how many emails ("sellers relocating out of state, 3 emails over a month") and click DRAFT THE SERIES : it writes the days, subjects and emails. DRAFT WITH AI on any one email rewrites just that one. It never makes up numbers; fill in any [placeholders], then SAVE EMAILS .
- TURN ON : from then on, new people who fit join on their own (a new buyer lead, a client who closes…). ADD EVERYONE WHO FITS NOW adds the ones already in your book. On a client's page, **Email campaigns** shows what they're in, with **Add to a campaign** and **Remove**.
- **Newsletters** (once a month is plenty): + NEW NEWSLETTER . Under **Write it with AI**, BRAINSTORM IDEAS suggests topics for the month (tap the ones you like, or type your own), then DRAFT THE NEWSLETTER writes the whole email. It never makes up numbers: fill in any **[placeholders]** it leaves (like this month's median price), read it over, SAVE EMAILS , SEND ME A TEST . Then tick who gets it (past clients, sphere…), pick the day and SCHEDULE .
- Emails go out between 8am and 6pm (Arizona), each is logged on the client's timeline, and every email has an unsubscribe link and the office address. Someone who unsubscribes is never emailed by a campaign again (their page says so). Lead drips stop by themselves when the lead becomes an active client; nobody gets more than two review requests.

- The top of Campaigns shows **Emails this month: X of 3,000 · Today: Y of 100**. If it gets close, sends wait for the next day; nothing is lost.

OPEN HOUSE SIGN-IN

1. On a listing's deal card, `OPEN HOUSE` (or Marketing → Open houses → `+ NEW OPEN HOUSE`): pick the date and times, the host, and the drip visitors join (the *Open house visitors* starter is picked for you).
2. On the iPad at the door, open `OPEN SIGN-IN SCREEN` in Safari (Share → **Add to Home Screen** makes it full screen; **Guided Access** in the iPad's Accessibility settings keeps visitors on it). Visitors can also scan the QR code with their own phone.
3. Each visitor enters their name, email or phone and a few taps (working with an agent? pre-approved? when buying? a home to sell?). The screen can't see any client data.
4. In the CRM, each one becomes a **New Lead** tagged "Open House · street" with a follow-up task (someone already in your book gets a note instead, no duplicate). Visitors who aren't working with an agent and gave an email join the drip. The open house page lists who signed in.
5. `DELETE` on an open house's page removes it, its sign-in link, and its appointment on the seller's page, the Calendar and Apple Calendar (the timeline notes it was cancelled). The visitors stay in your clients.

SOCIAL: FACEBOOK AND INSTAGRAM

The CRM does most of the work. Every **Monday morning** it plans the week: 3–4 posts from what really happened (new listings, price changes, open houses coming up, under contract, sold, a new review) plus helpful ones (a tip for Arizona homeowners, a buyer or seller tip, something local or seasonal). Each has a caption with hashtags and a suggested day and time. Once a few posts are out, the plan also **learns from Results**: it leans toward the kinds of posts that got the most likes, comments and shares over the last two months (and still mixes it up). Now and then (some weeks, never two in a row, at most twice a month, on a different day each time) one post points people to your website: the free **home value tool** or **this month's blog post**, taking turns and worded fresh each time. For the blog one, paste the post's link where it says [link to this month's blog post]. Links to your website in posts are tagged, so a lead who clicks through shows "came from facebook" on their timeline. You get one task: **Approve this week's social posts (about 5 minutes)**. Nothing ever posts without approval.

1. Open `MARKETING → SOCIAL`. Each post under **Coming up** shows its caption, picture, networks and time.
2. Read the caption and change anything. Fill in any [bracketed] part (the CRM never makes up prices or details, so it leaves those for you). Clients are never named.
3. Add a picture: `UPLOAD PICTURE` (a photo from your phone or computer), or `DESIGN IN CANVA`, which opens your saved Canva template and copies the caption; in Canva, Share → Download (JPG), then upload it here. **Instagram needs a picture**; without one, untick Instagram for that post.
4. Click `APPROVE`: it goes out on Facebook and Instagram together at its time. `SKIP` drops a post; `DRAFT CAPTION WITH AI` rewrites it; `POST NOW` posts right away.

- **+ NEW POST** adds your own (leave the caption empty and the AI writes one). **PLAN THIS WEEK** makes the plan now if Monday's didn't happen. Don't like this week's ideas? **FRESH IDEAS** swaps the suggested posts still waiting for approval for new ones (approved and posted ones, and posts you made yourself, stay). Suggestions you never got to from an earlier week clear themselves when the new week's plan comes in.
- If nothing is approved by Wednesday, a gentle reminder task appears. The top of the page counts what was posted this month.
- An admin can pause the Monday plan (a note at the top says so); + New post and Post this on a listing still work.
-
- A post that couldn't go out shows **Didn't post** with the reason (for example, Facebook needs connecting again); fix it and approve again.

Post this on a listing: on a listing's deal card (active, new price, under contract or sold; or a buyer's closing), **POST THIS** makes a post draft from the deal: the AI caption (clients never named) and a **Details for your design** box with the address, price and status, each with a **COPY** button to paste into your Canva template. Canva can't fill the template in for you (that needs Canva Enterprise), so **DESIGN IN CANVA** opens your template and you paste the details in.

After it posts (the **Recent** list): each post shows its picture, first line and where it went, with **VIEW ON FACEBOOK** / **VIEW ON INSTAGRAM**, **BOOST** (opens the post on Facebook: click **Boost post** there, pick the budget and days; Meta runs real estate boosts as Housing ads) and **REMOVE POST**, which takes it down from Facebook by itself. Instagram doesn't let apps delete posts, so the CRM tells you when to delete it in the Instagram app (··· → Delete). Only posts made through the CRM can be removed here.

Results: the **RESULTS** button at the top of Social shows this month's likes, comments and shares, your best posts, and every post's numbers (last 90 days). Reach and boost numbers appear once an admin adds two more Facebook permissions.

> **TIP**
> Social works with **your own** Facebook Page and Instagram (a Business account linked to the Page). Ask Logan or Tiffany to add you to the CRM's Meta app (a role called Tester is enough), accept the invite in Facebook, then click **Connect** in Marketing → Social and pick your Page. Until then you can still plan and write posts here.

MAILINGS (CARDS AND PRINTED MAIL)

1. **MARKETING → MAILINGS** → **+ NEW MAILING** (e.g. "Christmas Cards 2026"). It suggests everyone you stay in touch with: active clients, past clients and sphere contacts. For **closing gifts**, pick "Everyone who closed with us in (this year)" under Start with: it lists everyone who closed a deal with you that year (buying or selling), with their mailing addresses, ready for labels. Copy it next year and it covers next year's closings.
2. Narrow it down with the filters, or add and remove people by hand.

3. Print DYMO labels, and mark each household addressed, sent or returned as you go.

> **TIP**
> A client's mailing name (e.g. "The Lopez Family") and mailing address are on their page under Contact. Clients marked "do not mail" are always left out.

PRINTING DYMO LABELS

On the mailing, click **LABELS**. First pick who to include at the bottom: **Only To do and Addressed** (the usual choice, so you don't print a label twice) or **Everyone on the list**. Households with no mailing address are left off and show "No address" on the checklist.

Way 1: DYMO Connect (recommended, best-looking labels). You need the free **DYMO Connect** app on the computer the DYMO is plugged into (dymo.com → Support → Software).

1. In the CRM, click **DOWNLOAD FOR DYMO**. A spreadsheet of names and addresses downloads.
2. Open DYMO Connect, choose your label (for example **30252 Address**, the standard 1⅛" × 3½" roll) and pick an address layout.
3. Click **Import data** (in DYMO Connect: File → Import data, or the Import button), pick the downloaded file, and click **Next**.
4. Drag the **Name** and **Full Address** fields onto the label (or Name, Address Line 1 and City State ZIP on separate lines). The preview shows each household.
5. Click **Print**. DYMO Connect prints one label per household. Save the label design once and next time only the Import step is needed.

Way 2: print straight from the browser (no DYMO app).

1. In the Labels box, pick the label size (**DYMO 30252**, **DYMO 30321** large address, or an **Avery 5160** sheet for a regular printer) and click **PRINT LABELS**.
2. In the print window, choose the DYMO printer, set the paper size to the same label, margins to **None**, and scale to **100%** (not "Fit to page"). Then Print.
3. On an Avery sheet that's partly used, enter how many labels to skip first so printing starts on the next empty one.

> **TIP**
> Print one label first to check it lines up. Then, on the checklist, mark those households **Addressed** so the next print skips them. The CRM remembers the label size you used last.

15 Goals

The Goals box on the Dashboard tracks the year: **closings** (each closed transaction counts, so a buy and a sell is two), **sales volume**, **commission** (your share after the brokerage split), **new leads** and

appointments you attend. Each line shows how far along you are, a marker for where you'd be on pace today, and what's under contract.

1. Dashboard → **SET GOALS**.
2. Enter the targets you want to track (leave any blank to skip it) and your share after the split.
3. Add a custom goal if you like (e.g. "Call 100 past clients") and count it with +1.

16 Clean-up mode and missing details

Clean-up mode walks you through contacts one at a time to fill in what's missing. Start it from **CLEAN UP** on the Clients page or **CLEAN UP CONTACTS** in the Dashboard's Missing details.

- Past clients missing a close date come first, then sphere contacts not yet reviewed, then anyone missing details.
- For each: did they buy or sell with you (close date, address, price), phone and email (and the spouse's), birthdays, and mailing address.
- **SAVE & NEXT**, **SKIP** or **BACK**. Stop any time with **DONE FOR NOW**.
- **JUMP TO** picks anyone in the list (✓ marks ones you've saved); **OR FIND ANYONE** opens any contact by name.
- A spouse or co-buyer is named at the top so it's clear whose details you're filling in.

Quick list (the switch at the top of Clean-up): everyone missing a phone or email (or pick *Missing phone*, *Missing email* or *Missing birthday*), one row each. Type straight into the boxes; each one saves when you move to the next. The fastest way through a big cleanup session.

Duplicates (also a switch at the top of Clean-up, and **DUPLICATES** on the Clients page or *Possible duplicates* in Missing details when there are any): the same person in the CRM twice, found by the same email, phone or name. Each pair is shown side by side.

- **MERGE…**: pick the record to keep. Everything from the other one (timeline, tasks, appointments, dates, deals and their documents, campaigns, mailings, people they referred) moves to it, its blank details are filled in, and details that differ (another email or phone) are noted on its timeline. The other record is then removed. This can't be undone.
- **NOT THE SAME PERSON**: two different people who happen to match (a shared phone, the same name). They're never shown as a pair again.
- Adding a new client who's already in the CRM (same email, phone or name) asks first: **OPEN** them, or **ADD AS A NEW CLIENT ANYWAY**.

17 Your settings

SETTINGS → MY SETTINGS is just for you. At the top, **My setup** shows how many of your setup steps are done ("5 of 7"); open it to see what's left, each with a **SET UP** button that jumps to the right box. When

everything's done it shrinks to "✓ All set". Someone brand new also sees a one-line reminder on the Dashboard until they're halfway (or tap **NOT NOW**).

- **Your name on messages**, **draft tone** and **email signature** (used on AI drafts; or tick *Let my email app add my signature* to use your Outlook or Gmail signature, logo included).
- **Other email addresses I send from**, so emails from those log correctly.
- **Show AI drafting** on client pages, on or off.
- **Follow-up habits:** when a client counts as "going cold", the default follow-up task, and the default agent on new clients.
- **Dashboard:** which panels you see, and which goal lines.
- **My calendar feed** (your private calendar link) and **Security** (your two-factor).

INTEGRATIONS shows what's connected and working for you (*Active*) and what isn't set up for you yet (*Needs setup*). **BACKUP & EXPORT** downloads a spreadsheet or full backup of your book when an admin has turned downloads on for agents.

18 Questions and troubleshooting

"Live updates paused. Reconnecting…"	Your connection dropped. Keep working; your changes save and it reconnects on its own.
Something didn't save	A message will say so. Check your connection and try again.
The Text button shows a QR code	You're on a computer that can't open Messages. Scan the code with your iPhone camera.
My code doesn't work	Use the current code; check your phone's clock is automatic. Lost your phone? Ask an admin to reset your two-factor.
I don't see a client	Check the tab (All, Active, Past, Sphere, Lost) and the search box.

Anything else: ask **Logan** (logan@premierrealtyaz.com) or **Tiffany**.

Premier Realty Group · The Mom & Son Home Team · Questions: Logan (logan@premierrealtyaz.com) or Tiffany