



LeadStreet Contacts

Ver. 1.1



Revision History

Name	Date	Version	Description
<i>Tamika Anglin</i>	<i>09/09/13</i>	<i>1.0</i>	<i>Initial Creation</i>
<i>Tamika Anglin</i>	<i>11/04/13</i>	<i>1.1</i>	<i>Updated the import contacts section and performed minor formatting</i>

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Contacts Overview

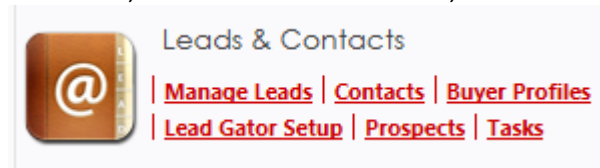
Contacts are current, prospective and past clients whom you interact with or know on either a professional or personal level. It is important to have an updated list of contacts in LeadStreet to enhance the number and quality of leads that you receive. In our world, leads and contacts are used interchangeably to show that though a lead starts as a notification, the client information is added to your contacts base, and any activities by that client is directed to you.

Getting started with your contacts

- Sign in to LeadStreet via MainStreet
- Select the white arrow next to the red HomesConnect button at the top left hand section of the page



- From here, under Leads and Contacts, select Contacts



- You will then be taken to the page to manage your contacts

Add New Contact

Contacts will appear in your database by performing the following actions:

- Manual upload
 - On the contacts page, select **Add New Contact**
 - Update the different parts of the contact and select Save
 - Note the section entitled **parts of a contacts** below for a detailed explanation
- Accept a lead

Leads which have to be accepted or declined, once accepted will appear as a contact in your database however, declined leads will not appear in your database. Leads from your listings will automatically appear in your contact database with a notification via email.
- Import contacts from social networking connections

Contacts from social networking connections can be imported into your LeadStreet initially as prospects, then later as actual connections. This will enable leads generated from these contacts to be sent to you. We will examine the social networking aspect of the system in its entirety another document.
- Import Business Card

.vcf files can be exported from applications such as Microsoft Outlook and can be imported



into your contacts database. .vcf files only allow the export of a single contact at a time. To import a business card:

- Export and save a contact in the .vcf format on your computer or any accessible device
- On the contacts page, select Import Business Card from the right hand side of the screen under Quick Actions
- Browse for and select the file at the saved location
- Select Upload File
- Your contact is now successfully added to your contacts database

- Import Contacts

Where you have multiple contacts to import, these can be amassed in a single Comma Separated Values (.csv) file and uploaded.

- On the contacts page, select Import Contacts from the right hand side of the screen under Quick Actions
- On the Import Contacts page, select Sample CSV File and save it to your computer. This shows the preferred format for the file to be successfully imported; however the system will accept other formats of CSV files.
- You can copy your contacts into this file or create your CSV file and modify the headings to match the headings in the sample CSV file
- Proof the contacts list to remove any special characters such as commas and ampersands. Replace (&) with and, replace (,) with a space. This is achieved by doing a Find and Replace within the workbook.
- Once you have your file
 - File Type : Standard Format (.CSV – ASCII) – If you have chosen to convert your file to resemble the Sample CSV File
 - If you had not converted your file, select the file type corresponding to the program you used to create your CSV file.
 - File To Import: Select the Browse button to locate your .CSV file
 - Categories: Contacts classification (optional)
 - Lead Source: Choose how these contacts were acquired (optional)
 - Select Import



Parts of a contact

At the time of creating a new contact or editing an existing one, the page is segmented into the following sections:



- **Contact**
 - Contact Information
 - Last Name – Last Name of the contact
 - First Name – First Name of the contact
 - Title – Contact’s title
 - Email/Salutation – How the contact prefers to be addressed in an email
 - Company – Name of the organization the contact is affiliated with
 - Contact Status
 - Active – Contact is able to make contact with you via leads
 - Inactive – Future leads from this contact is barred. In the case of SPAM leads, this option is useful in barring such contacts from sending these types of leads.
 - Lead Source – The medium by which the contact was acquired
 - Lead Priority – Based on this client’s activity on the lead sources, the priority will be updated accordingly by the system. You also have the ability to update as you see necessary.
 - Communication Detail
 - Email Address – Email address of the client
 - Email status – system verification to show that the email address is in the correct format. No verifications are carried out to determine whether or not the email address is in fact valid, but just that it exists in the correct format.
 - Website URL – Client’s website if available
 - Country – The country the client is in
 - Address
 - Suite
 - City
 - Province
 - Postal Code
 - Address Status
 - Home Telephone
 - Work Telephone
 - Ext – Work telephone extension
 - Mobile Telephone
 - Fax/Data Number



- Categories
 - You are able to categorize your contacts. This will be useful in your campaigns or other CRM.
 - You can modify or delete the categories available by going into your dashboard from within Leads and Contacts -> Overview -> Manage Contact Categories
- Form Messages
 - This option will be populated when the contact is added from a lead, and the client has input any messages via the lead generating medium.
- General Notes
 - You have the option of inputting any details/notes about the client which might be helpful in your communications/interactions.
- **Profile**

This section allows for you to create an automatic schedule of emails for the client as well as to create a search of properties based on the client's needs.

 - General Profile Information
 - Create a profile name for the type of search to be completed for this contact. If two contacts are looking for the same types of properties, they could be assigned the same profile.
 - Search Options
 - Property search criteria for the client.
 - Email Updates
 - Allows for the client to receive email updates based on the search options in the profile.
 - Personal Information
 - Information relating to the client which might be useful in your communication/assistance with your clients in understanding their needs.
- **Listings**

If the contact was added from a lead and an enquiry was made via a listing, the listing would appear here. Click on the property address in red to be taken to the actual property on the website from which this contact (lead) was added.
- **Email**

Select the campaigns to enrol this contact in, for automatic email marketing campaigns to be sent via LeadStreet. Add the client to any existing campaigns and select Save. This will be addressed in the campaign manager document.



- **Advanced**
 - Contact Preferences
Select, for your reminder, the means by which the customer needs to be contacted. Choose any combination of phone, fax or email
 - Login Information – Refers to homes.com MyHome Tracker account which gives clients the ability to sign on, save searches and receive automatic emails on new listings matching the client’s search criteria
 - Do Not Allow This Contact To Login
 - Allow This Contact to Login to Public Features

Export contacts

LeadStreet allows for you to export your contacts as a CSV file which can be used in other programs or for reporting purposes. To achieve this:


- At the contacts page, under Quick Actions on the right hand side of the page, select Export Contacts
- Choose any of the criteria for the report or accept the default options
- Select Export Data at the bottom right hand section of the page
- Save or open this document as needed

Search for and update contacts

- Find a contact
 - At the contacts section, complete one or more fields in the section as seen below and select search.

Last Name	First Name	Company	Email	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text" value="name@domain.com"/>	<input type="button" value="Search"/>

- Edit a contact
 - Once you have located a searched contact, under Actions, select the arrow next to Select an Action and choose Edit. Refer to **parts of a contact** for changes to any area of the contact profile.

Phone	Cat.	Status	Priority	Social	Actions
		Active			 Select an Action <input type="button" value="v"/>

- Send Email
 - You can send an email to an existing contact, under Actions, select the arrow next to Select an Action and choose Send Email. You can customize the email however you



like and it will be sent directly via LeadStreet.

- Launch Campaign
 - You can enrol an existing contact in a campaign, under Actions, select the arrow next to Select an Action and choose Launch Campaign. Select the pre existing campaign to send to the contact. You can verify successful addition under the campaign manager section of the system, which will be discussed in another document.

- Create Flyer
 - This will allow for the creation of flyers to be sent to the contact once the integration of Design Centre with LeadStreet is complete. To perform this, under Actions, select the arrow next to Select an Action and choose Create Flyer. This document will be updated to include the required steps once this feature is integrated.

- Delete Contacts
 - Delete a contact by selecting Delete under actions and then select the arrow next to Select an Action. You will then be prompted to confirm whether or not you would like to delete the record.
 - Select OK
 - The contact is now deleted from your database