RELATIONSHIPS *Rule*

Contactually

Getting Started

Semonin REALTORS®

A Berkshire Hathaway Affiliate

Contactually – Getting Started

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"So, you are ready to embed the best real estate CRM into your business? You are ready to update this system with information about your database. You are ready to move your business to a new level by leaning upon a software system that will remind you to call people, write people, meet people and stay in touch?

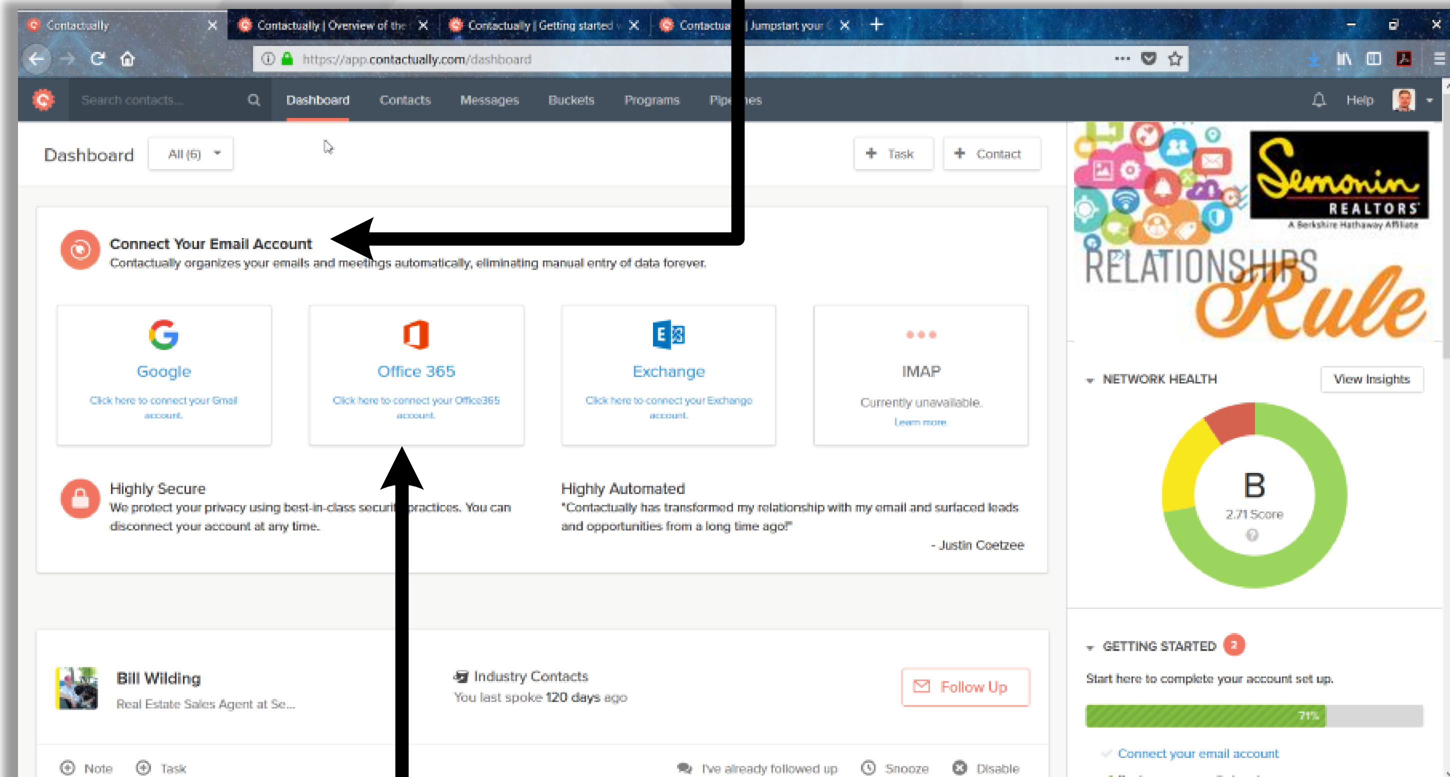
Consider yourself an EXCEPTION in this industry. Very few agents across this land are motivated to leverage a high performing database into the real estate business. Pat yourself on the back, take a moment to realize that you will become an exceptional agent when you embrace Contactually into your daily habits. So read this manual… absorb this manual and change your mindset!"

~Tim Moore, Senior VP of Marketology

Contactually – Getting Started

Connecting your Email Account

Upon logging in for the first time Contactually will recommend that you connect your Email Account. Later in Settings you will be able to connect other email accounts if you want to.



While there are a few different options for setting up an email account, we recommend you use your Semonin Email address, and set it up as Office 365.

Connecting your email address also connects your Office 365 Calendar, however if you prefer to use a Google Calendar and/or your Apple Calendar you can add those later in settings.

Contactually – Getting Started

Adding an Email Signature

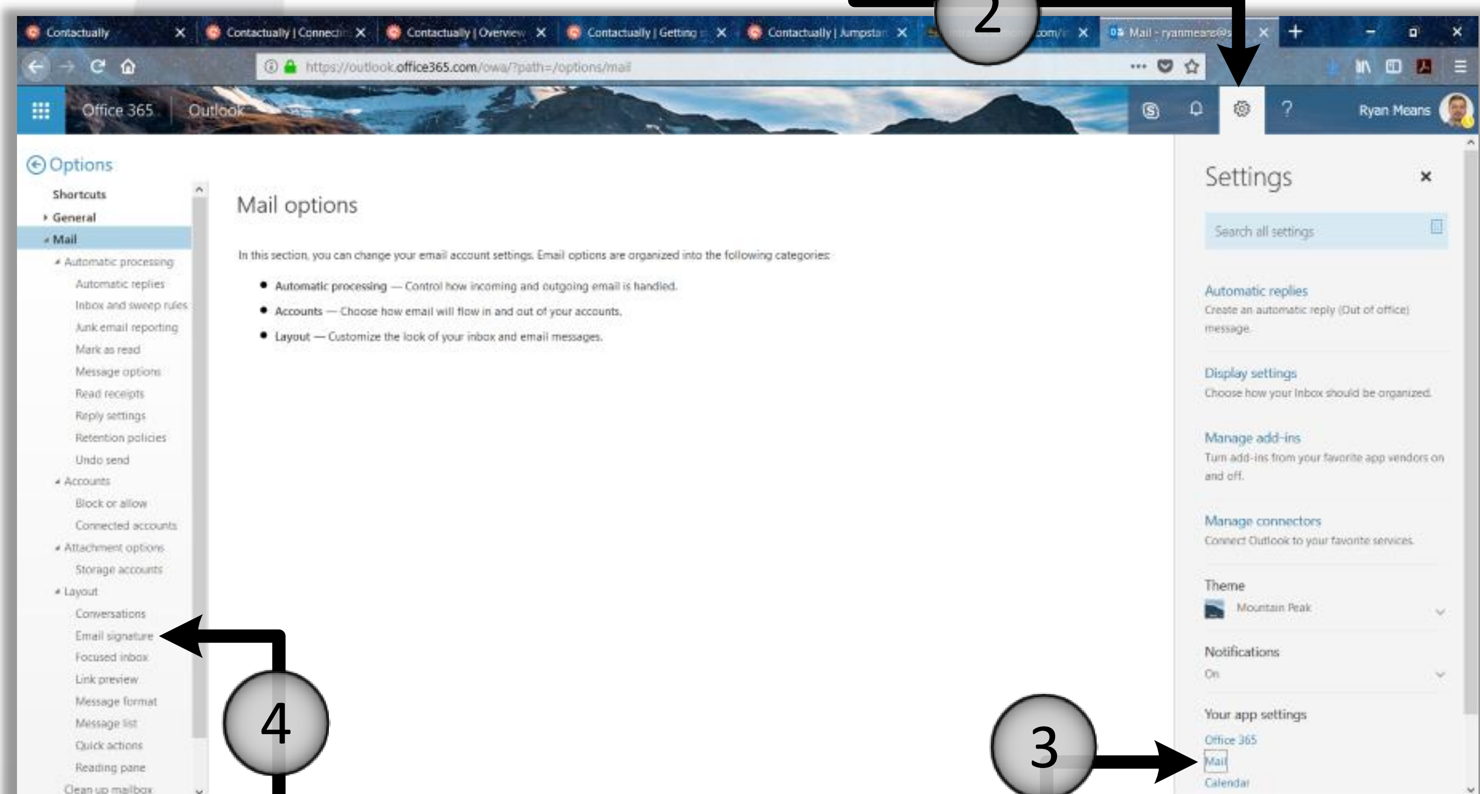
One of our favorite features of Contactually is that it sends emails directly through our email server, which means any emails you send through Contactually are sent from your email address. This helps to ensure every email you send to your clients looks and acts the same. To assist with this, you will want to add your email signature to Contactually, exactly as it appears in your current emails.

First, login to your email at Outlook.Office365.com.

1

Next, click the gear in the top right corner of the page.

2



4

3

Click Mail at the bottom of the list.

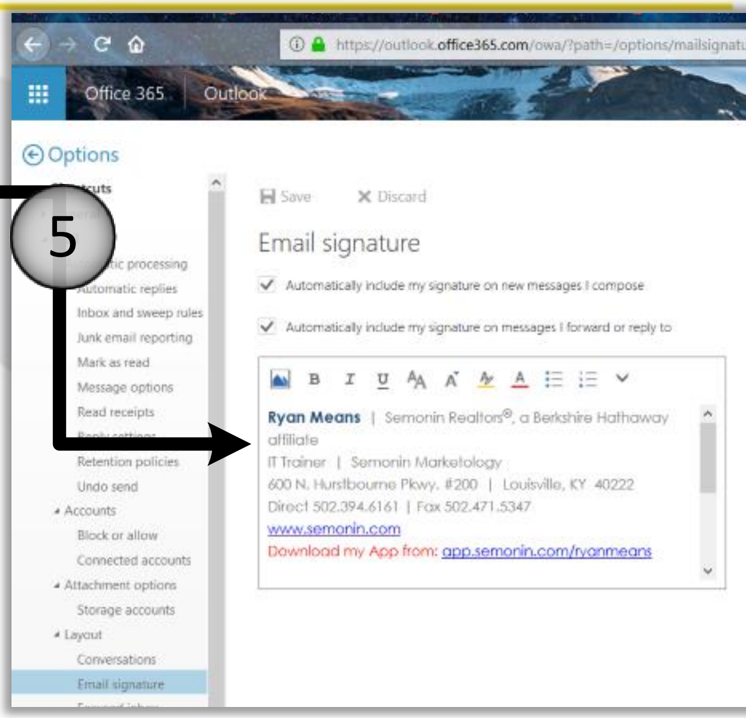
Click Email Signature on the left of the screen.

Contactually – Getting Started

Adding an Email Signature

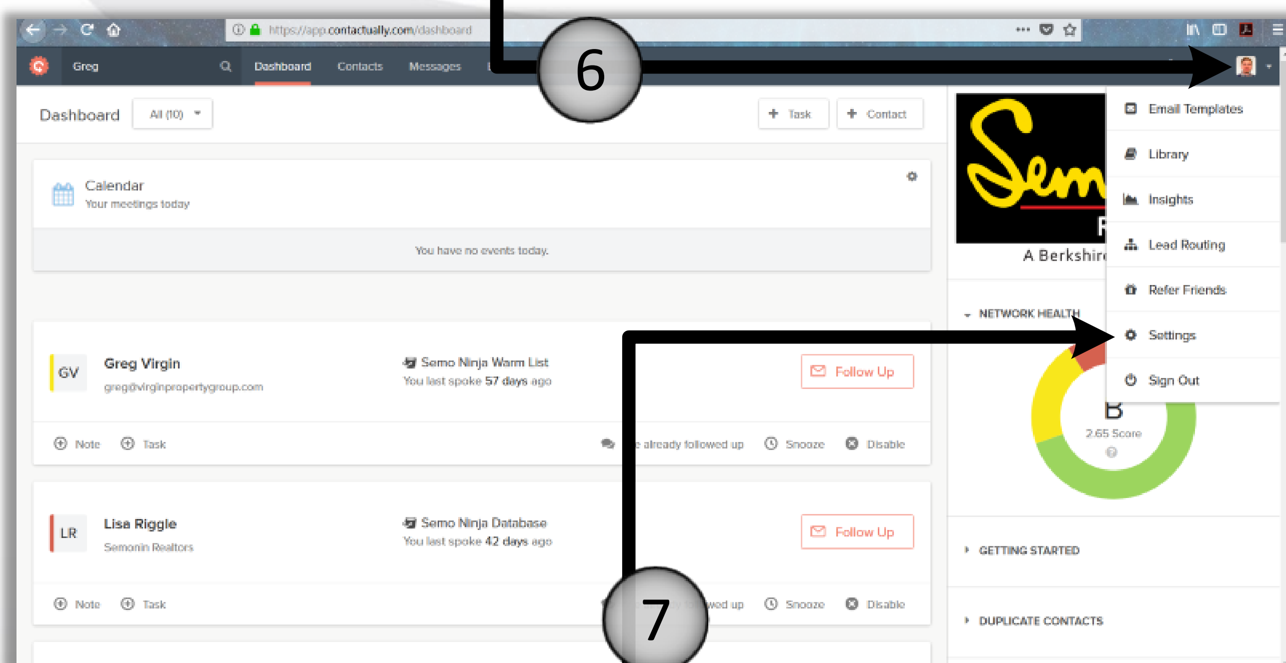
Select the text portion of your email signature (you can add photos too, but they cannot be pasted in) and copy it (right click and click copy, or hold ctrl and press C on a PC, or hold command and press C on a Mac).

5



Now, return to Contactually and click your initials or photo in the top right of the page.

6



7

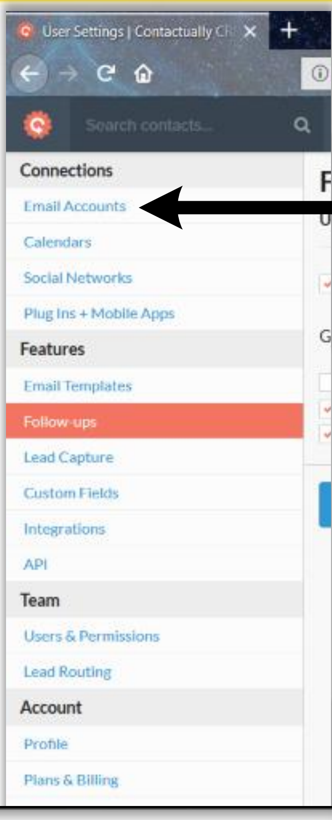
Next, click Settings.

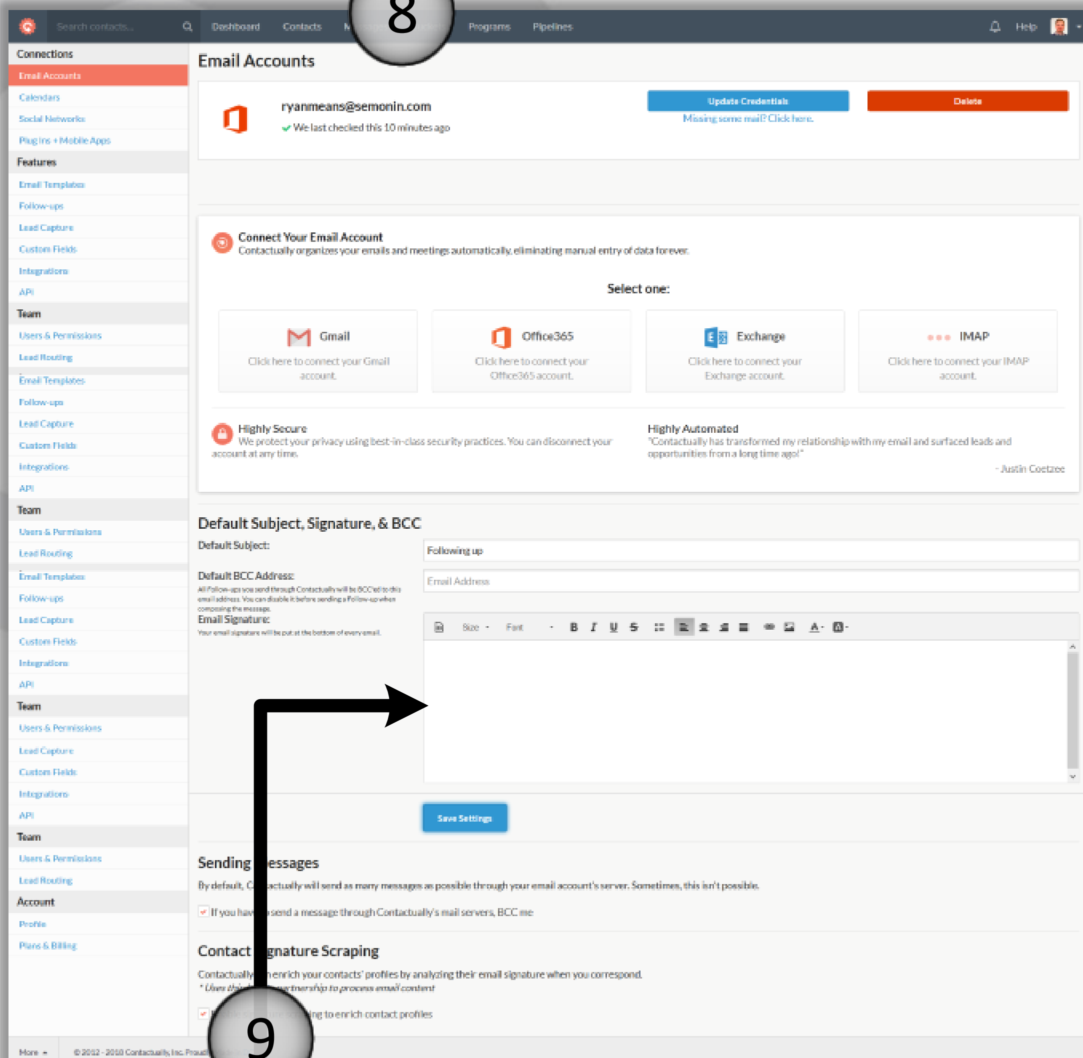
Contactually – Getting Started

Adding an Email Signature

By default Settings will take you to the Follow-Up Settings section. Click Email Accounts.

8





9

Now, click in the Email Signature box and paste your Signature Text (right click and click Paste, or hold ctrl and press C on a PC, or hold command and press C on a Mac).

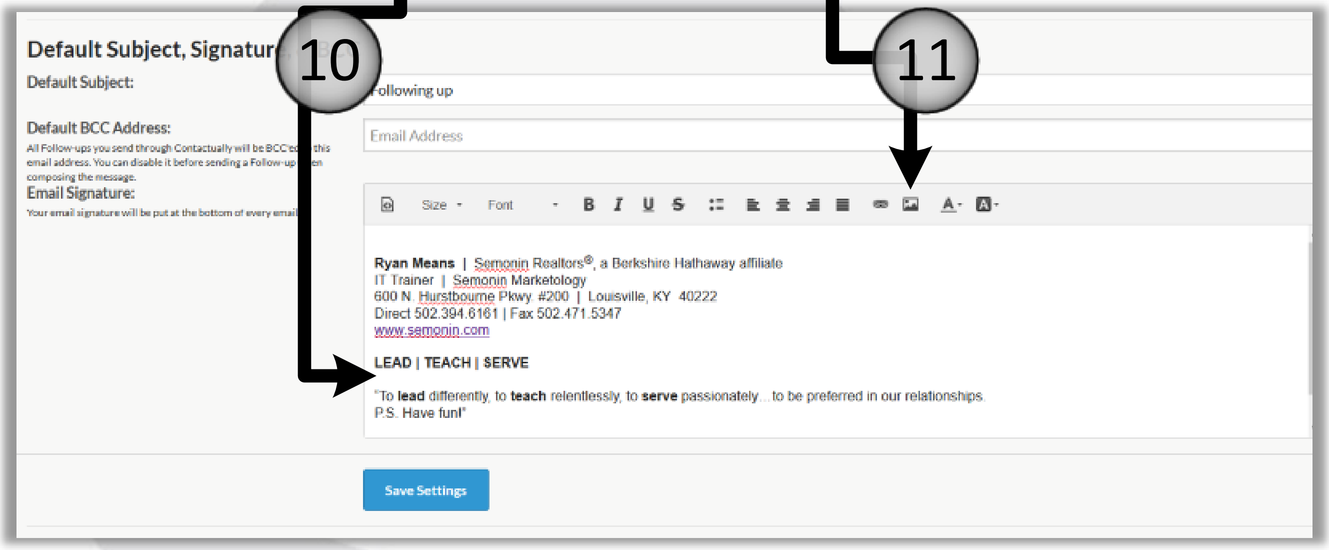
You can add as many email accounts as you want. If you add multiple accounts you will be able to select which account you email from each time. All contacts will be imported from all Email Accounts you connect, and Contactually will help you merge the duplicates after importing.

Adding an Email Signature

Once you have pasted the Text portion of your Email Signature, place your cursor where you want a photo (if you want a photo in your signature) by clicking once. Now click the Photo icon to add a photo.

10

11



13

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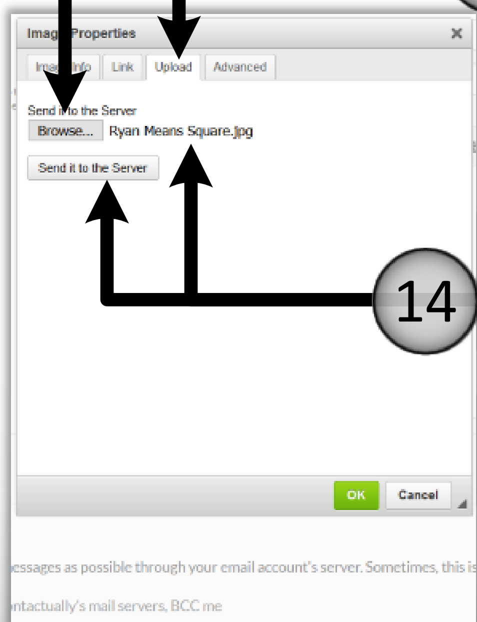

Click the Upload tab.

Click Browse, then locate the image you wish to use, likely in your Agent Drive, before clicking OK.

14

Once you see the Image Name click Send it to the Server.

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Adding an Email Signature

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Back on the Image Info tab set the width to 75 (for a photo of yourself), making sure that the Padlock icon is closed (if it is open, click it, then change the width to 75). For other images we recommend you set the height to 100, but this can vary depending on the image you are adding to your Signature.

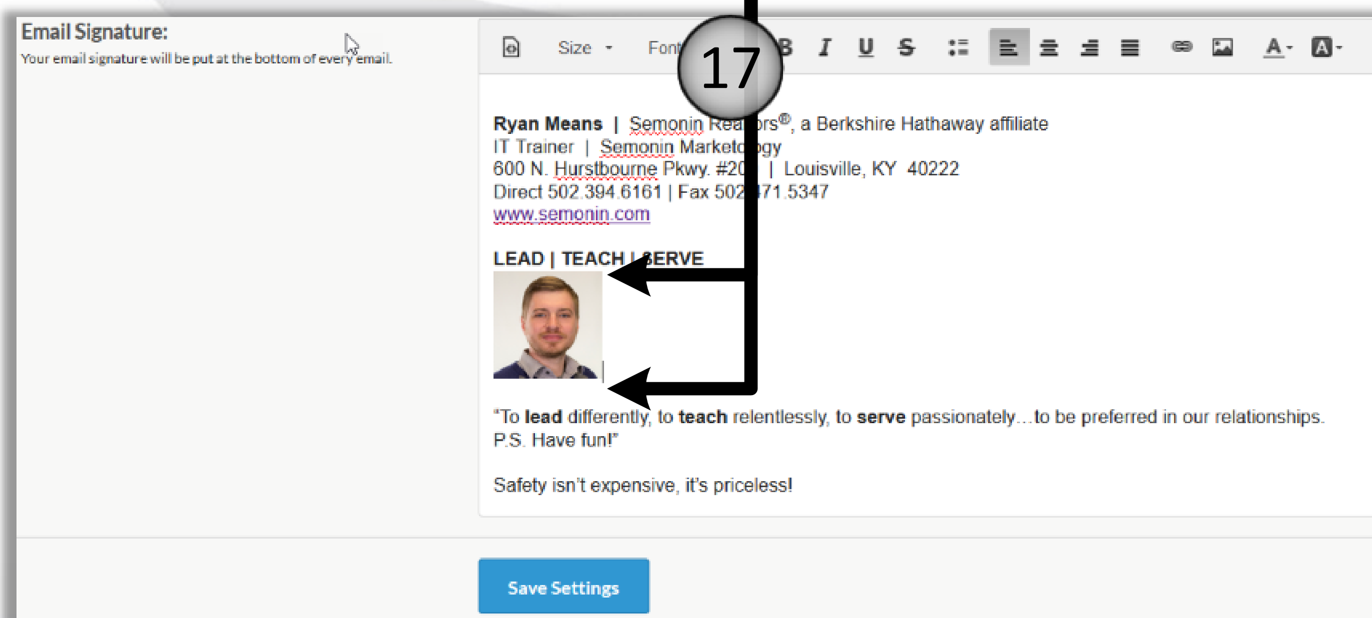
16

Finally, click Ok to insert the image.

Repeat for any additional Images you want to add!

17

Make sure you are happy with the spacing before and after your image.



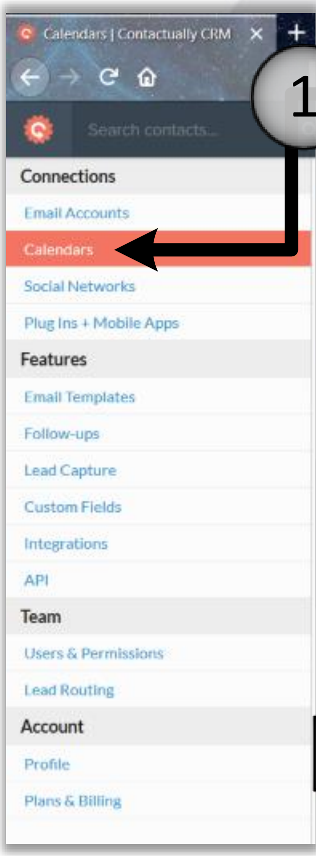
18

When satisfied with your email signature, click Save Settings.

Contactually – Getting Started

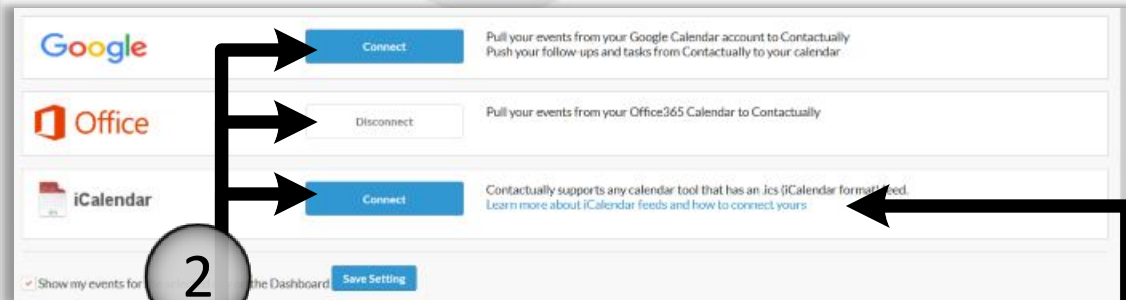
Connecting your Calendars

If you use a calendar other than the Semonin calendar that is connected to your email you will want to sync that calendar with Contactually as well. This will help you track recent and upcoming meetings with your clients, add tasks from Contactually to your calendar, and see "today's meetings" on the dashboard of Contactually.



1

To sync a calendar other than your Semonin Exchange calendar, click Calendars on the left side of the Settings window.

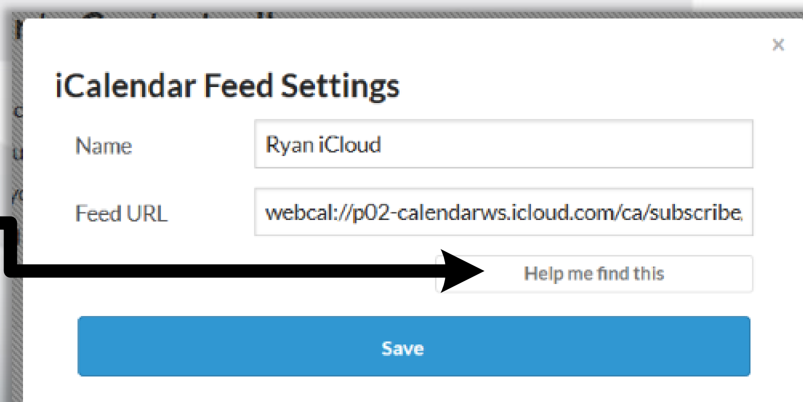


2

Your Office calendar is already connected, but you can add a Google calendar, or, using iCalendar you can connect most other calendars as well. To learn more and find instructions for your calendar, click Learn More.

You can only connect one calendar of each type to your account

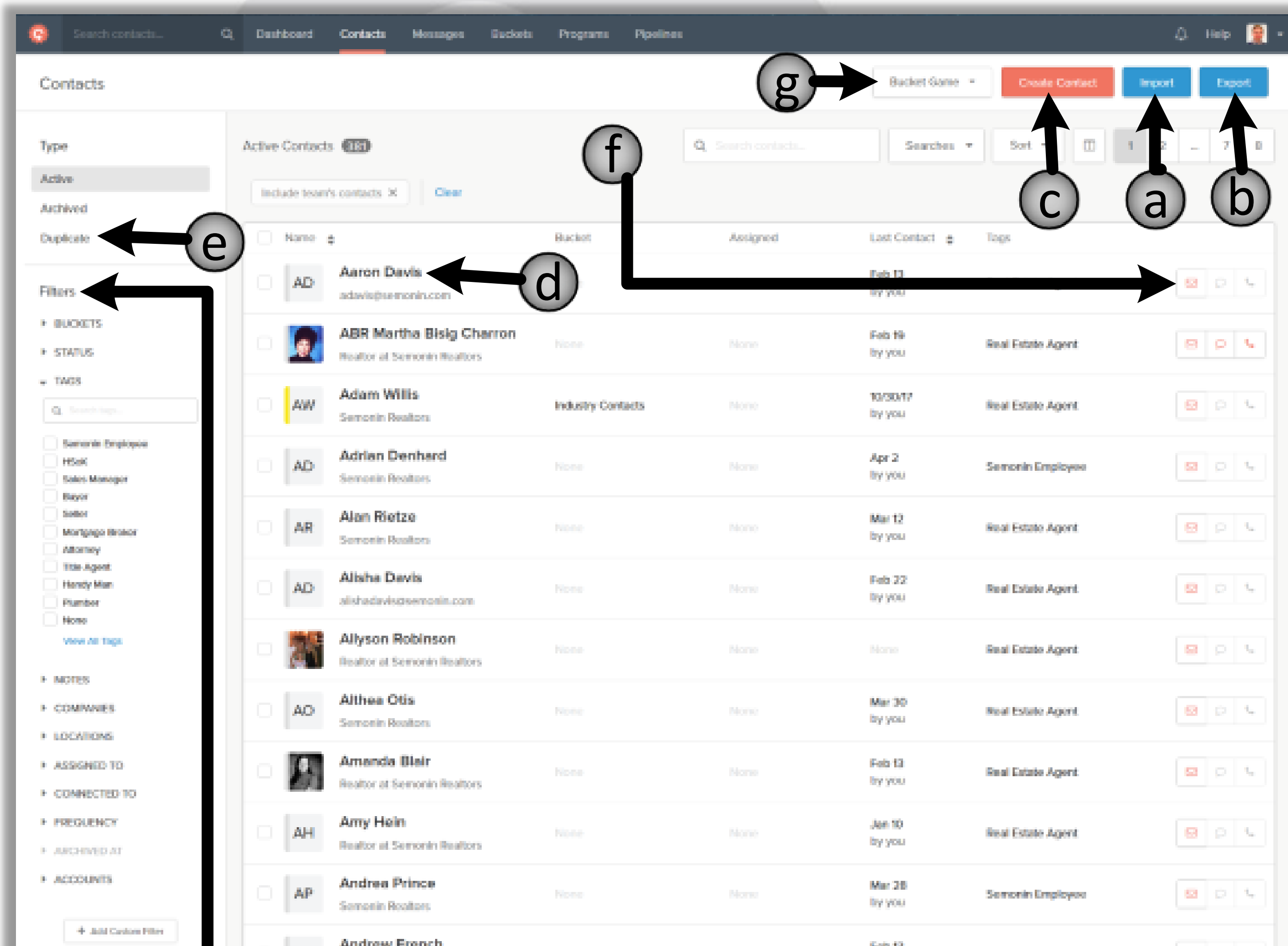
iCalendars use a Feed URL to sync your calendar. You can click "Help me find this" to get assistance finding/ creating the Feed URL.



Contactually – Getting Started

Contacts

On the contacts tab you will find a list of all your contacts. Here you can Import (a) or Export (b) Contacts, Create a New Contact (c), Edit Contacts (d), Manage Duplicate Contacts (e), follow-up with a contact (f) and play the Bucket Game (g).

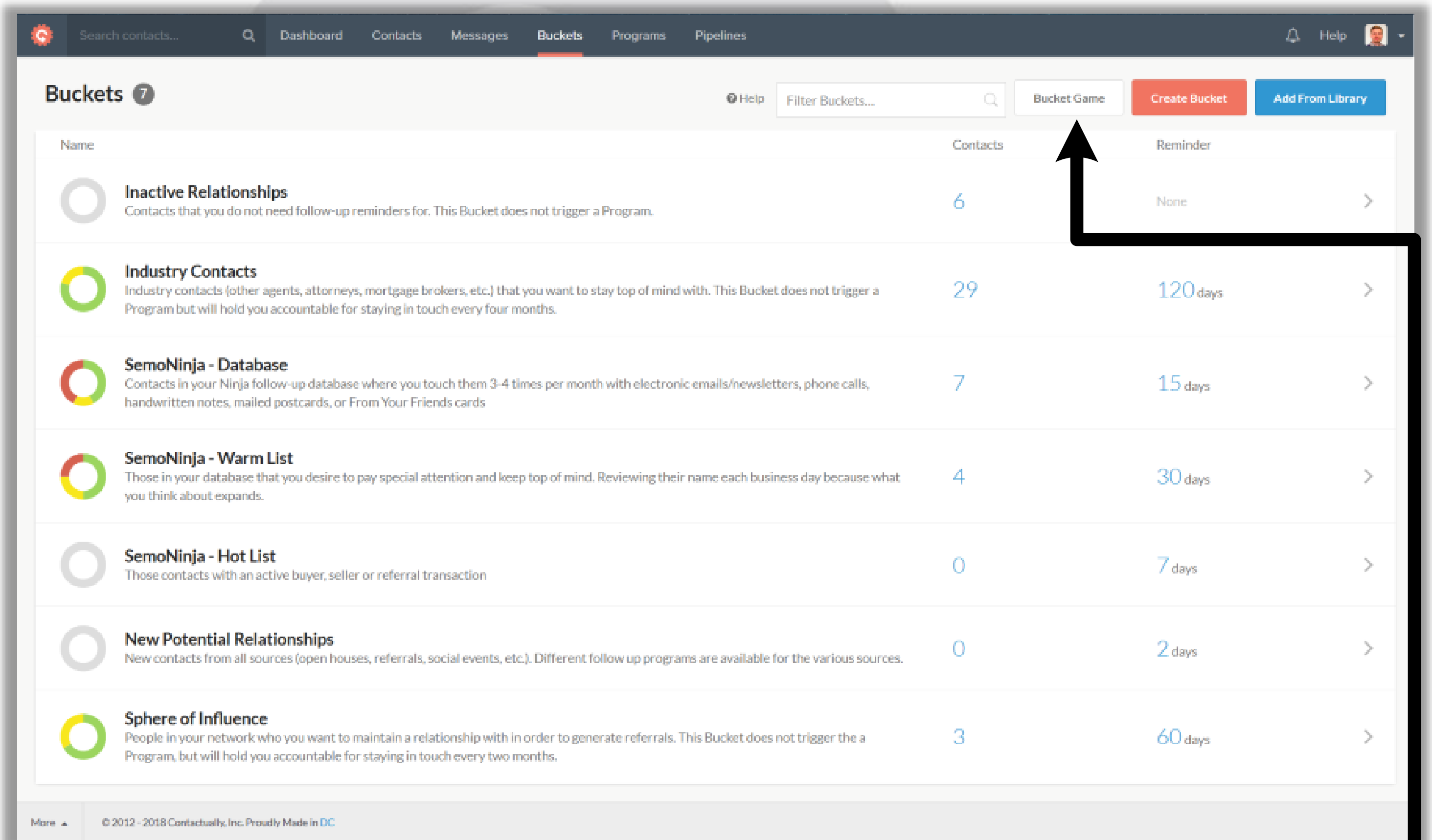


The contacts tab has many different ways to sort/filter contacts. You can even create your own Custom Filters if you want. Selecting a Bucket, Status, Tag or other filter option on the left will display only contacts that match that filter. Buckets are one of the main methods of grouping contacts in Contactually.

Contactually – Getting Started

Buckets

Buckets are the highest level of Organization methods in Contactually. You will use Buckets to organize contacts by how frequently you want to keep in touch. We have created a series of Buckets based on how we see your Relationships, and how frequently we believe you should keep in touch with your clients to stay in-flow with them.



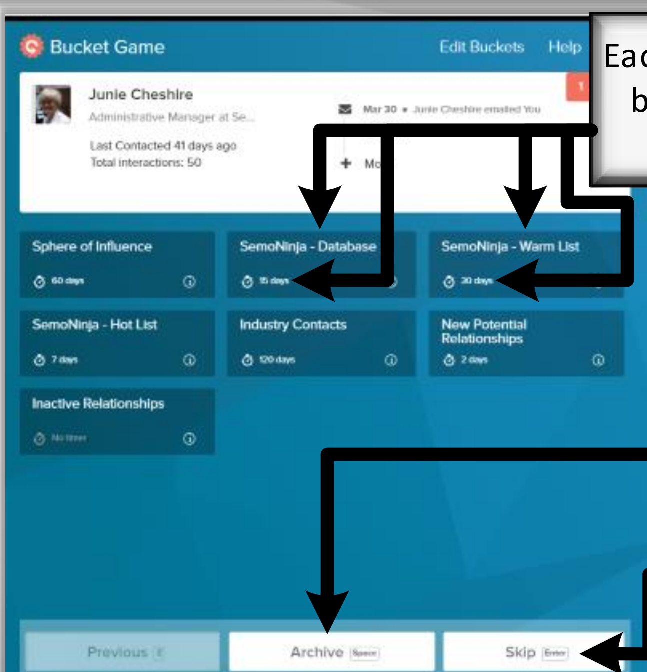
While we believe the current Buckets and their Reminder term is a great place to start, you may find that you want to keep in touch more or less often than what we have setup. You can rename, remove and create buckets, as well as change the reminder period for any of your buckets, independent of Semonin. These are your contacts, your Buckets and your Relationships.

From the Buckets page you can also start playing the Bucket Game.

Contactually – Getting Started

Working with Buckets: The Bucket Game

The Bucket Game is the fastest way to get started adding contacts to Buckets. The Bucket Game takes the first 50 Unbucketed contacts (based on the current filter and sort method) in your contact database and asks you which bucket they fit into. You simply click (or tap) a bucket for each contact, or you can Archive the contact, or Skip a contact.



Each bucket shows you the frequency at which you will be reminded to keep in touch with contacts. Simply click a bucket to place a contact in that bucket.

If you click Archive then the contact will be moved to the Contact Archive. Archived contacts are still accessible in Contactually, but do not show up in your main contact list, and you will not be reminded to keep in touch with them.

Skipping a contact will cause them to load first the next time you play the bucket game. Any contact who you do not wish to be reminded to contact, but that you don't want to archive, can go in the Inactive Relationships bucket.

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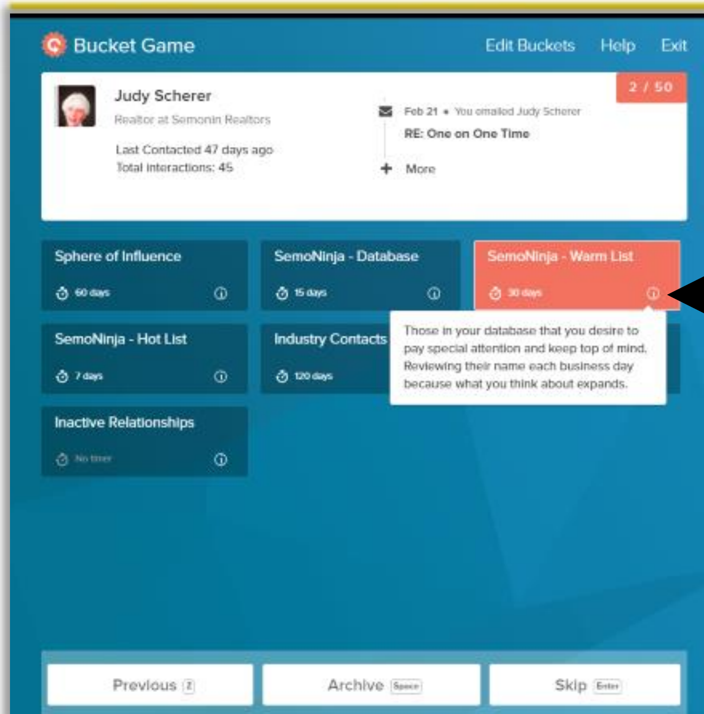
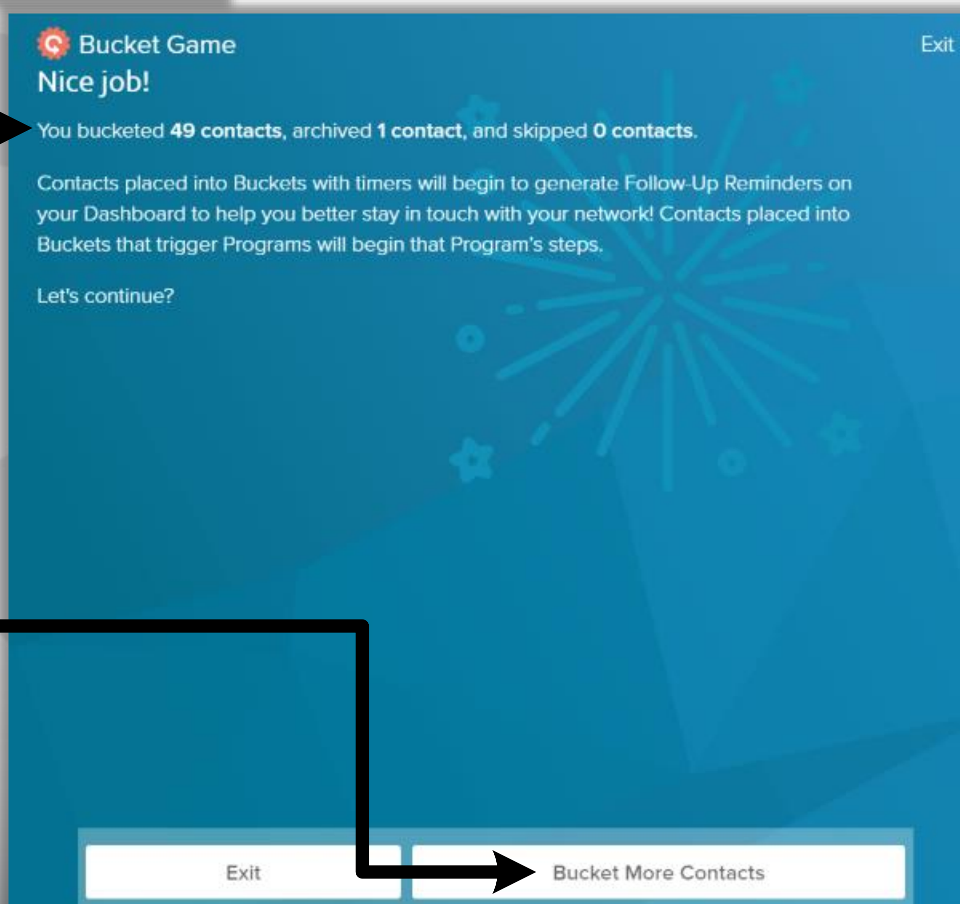
Working with Buckets: The Bucket Game



If you aren't sure which Bucket you want to add someone to, hovering over the i will give you more info about that particular bucket.

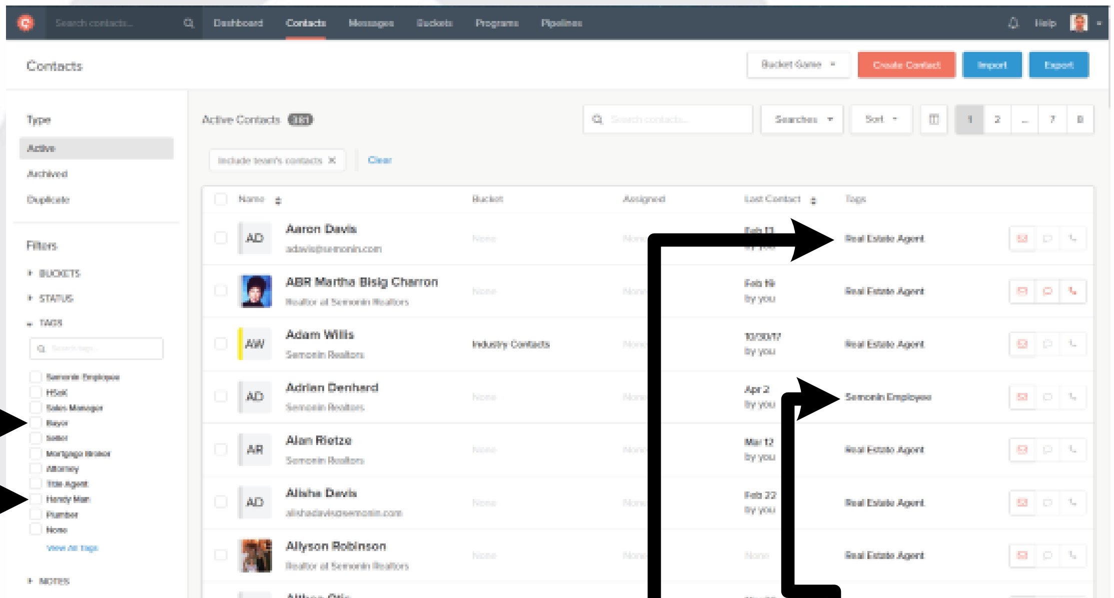


When you finish the first 50 contacts in the bucket game you will see a summary of how many contacts were bucketed, archived and skipped. You can immediately Bucket More Contacts if you wish to keep sorting!

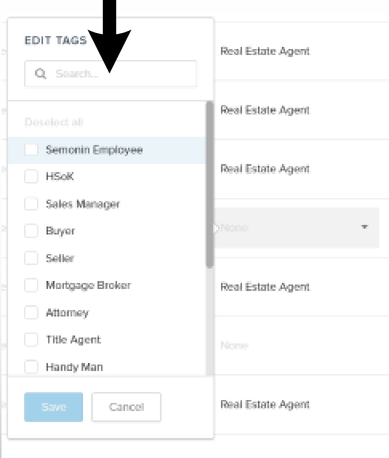
Contactually – Getting Started

Contacts: Tags

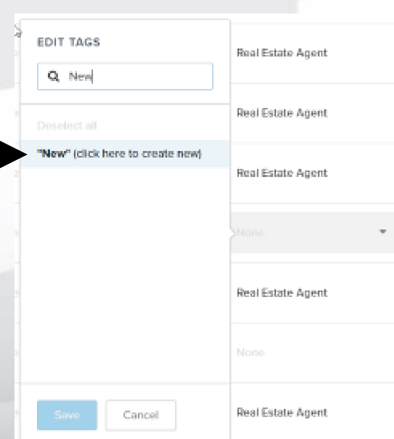
Another useful Contact Organization option is using Tags. Tags are a quick way to identify a contact in a more granular way than Buckets. Tags can be anything you want to be able to search by, and contacts can each have many tags. For example, you might add Past Client, Buyer, Seller, Friend, Family, Referrer, a Neighborhood name, a Zip Code, or any other tag that would benefit you to use when organizing your contacts.



In this example I have added tags for Real Estate Agent and Semonin Employee. On the left under the Filters, you can also see some of the System Tags, like Buyer and Handy Man.



When you click on tags next to a contact, you will see a searchable list of Tags. To create a new Tag, simply start typing in Search, and you will see your tag followed by "Click Here to Create New".

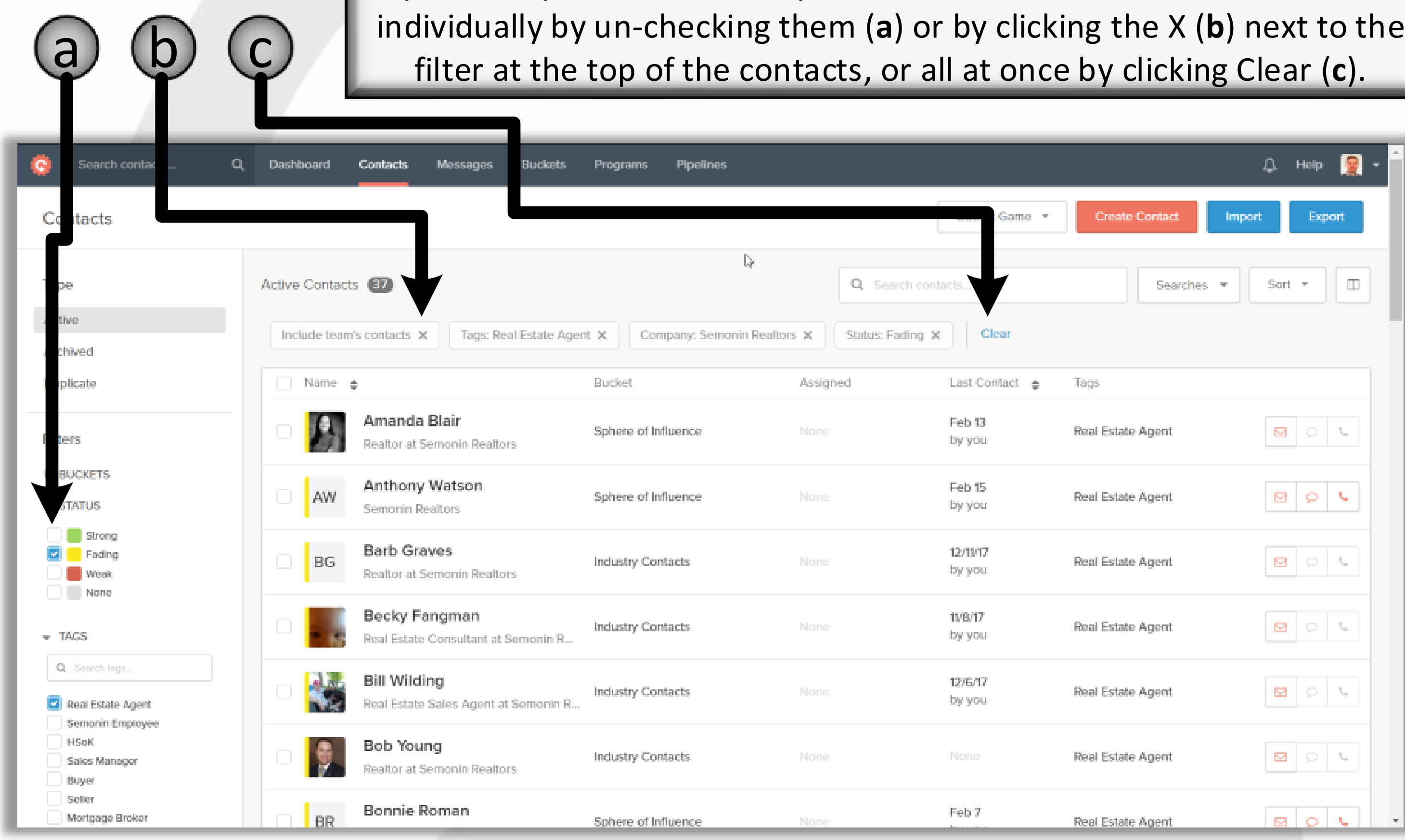


Contactually – Getting Started

Contacts: Filters

Along the left side of the Contacts window you will see a variety of Filters, and the ability to create your own filters. By placing a checkmark (**a**) next to a filter you are adding that filter to your contact search.

Once applied a filter must be manually removed, otherwise each time you view your contacts they will be filtered. Filters can be removed individually by un-checking them (**a**) or by clicking the X (**b**) next to the filter at the top of the contacts, or all at once by clicking Clear (**c**).

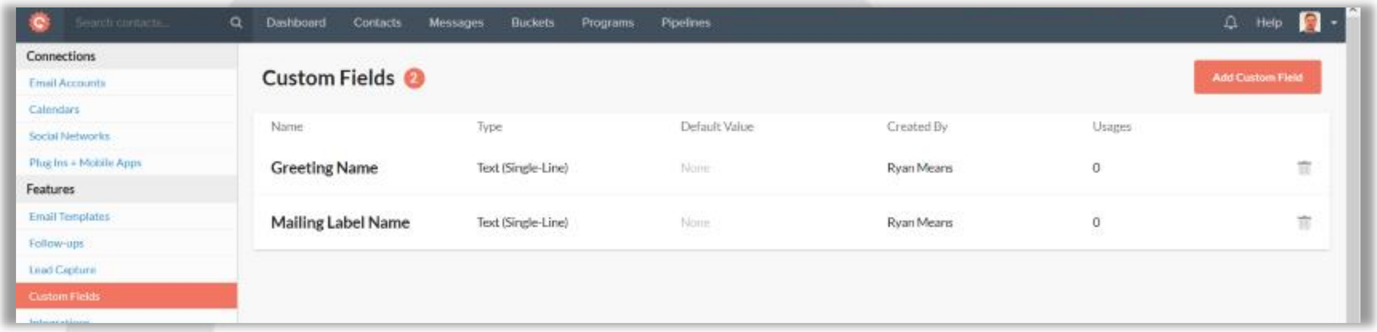


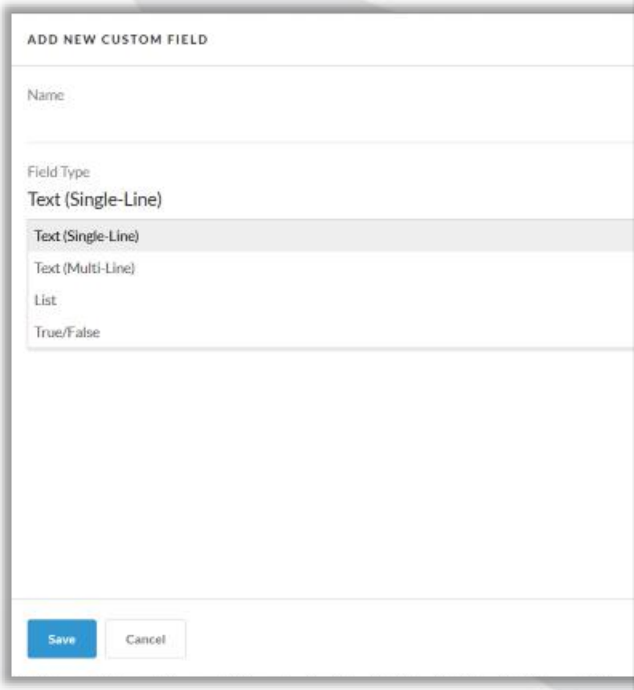
You can filter by Buckets, Status (In Flow, Fading Flow, Out of Flow or None), Tags (both system tags and tags you created), Notes, Companies, Locations (address City), Assigned to (if working in a team), Connected To (also for teams), Frequency (when contacted, added or how many times contacted), Archived At (only for Archived Contacts), Accounts (which of your accounts the contact came from) and Custom Fields.

Contactually – Getting Started

Contacts: Custom Fields

While Contactually provides most of the Contact fields you would use on a regular basis, they also provide you the option to add your own Custom Fields for contact info. Below you can see an example where we added Greeting Name and Mailing Label Name as custom fields. Now we are able to enter Greeting and Mailing Label Names for each of our contacts.





Custom fields have a few options; they can be **Single-Line Text, Multi-Line Text, Lists or True/False Statements**. For the previous example, Greeting and Mailing Label Names, we used Single-Line Text.

Multi-Line Text allows you to enter a large amount of data, for example you could create a field for Kids Names.

Lists allow you to pre-create a list of choices, then select ONE option per contact. This could be useful for recording how you met the contact (Open House, Referral, etc).

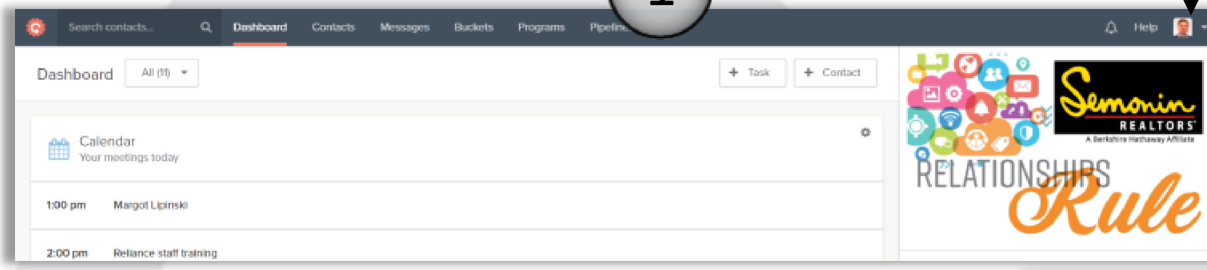
True/False Statements allow you to create a list of checkboxes that are selectable for each contact. This could be useful for types of Pets, or Mailing Lists that contact belongs to. Each True/False Statement creates one checkbox (for example, Dog would be one True/False Statement, and Cat would be another.

Contactually – Getting Started

Contacts: Custom Fields

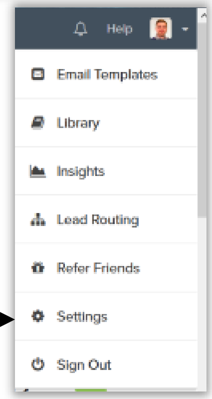
To create your own Custom Fields, begin by clicking Your Initials or Your Photo in the top right corner of Contactually.

1



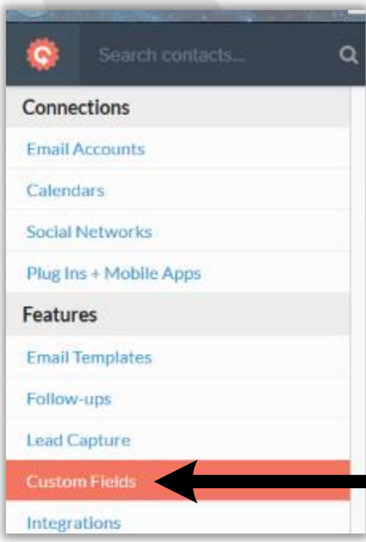
Next, click Settings in the drop-down menu.

2



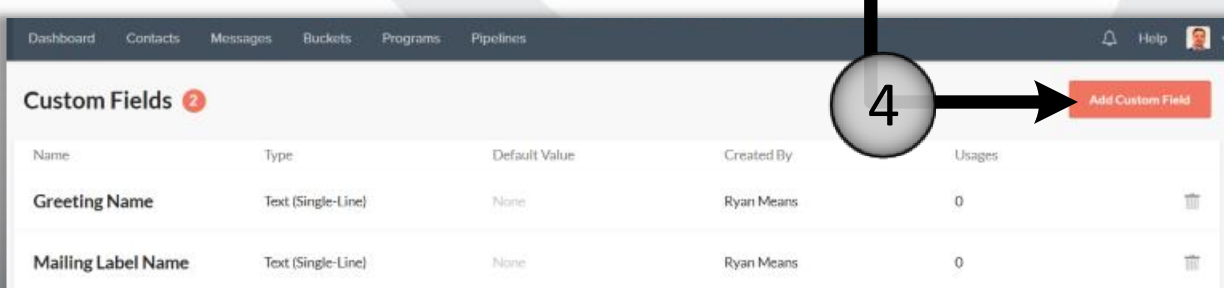
When the Settings Page loads, click Custom Fields in the menu on the left.

3



Once the Custom Fields page loads, click Add Custom Field to create a new Custom Field.

4



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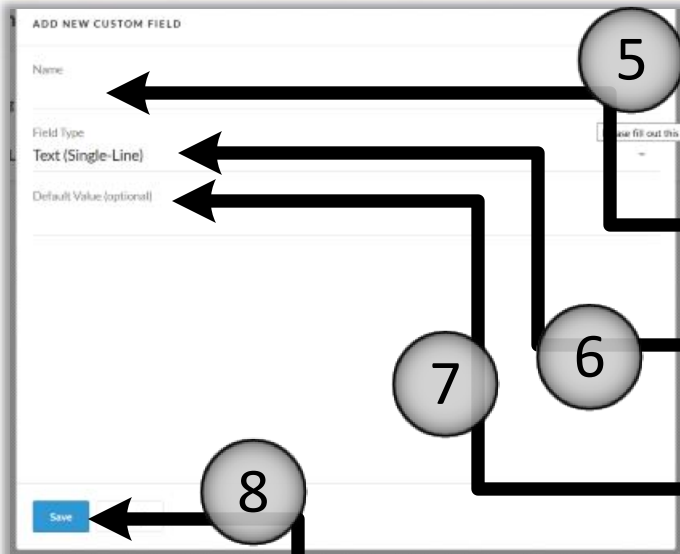
Contacts: Custom Fields



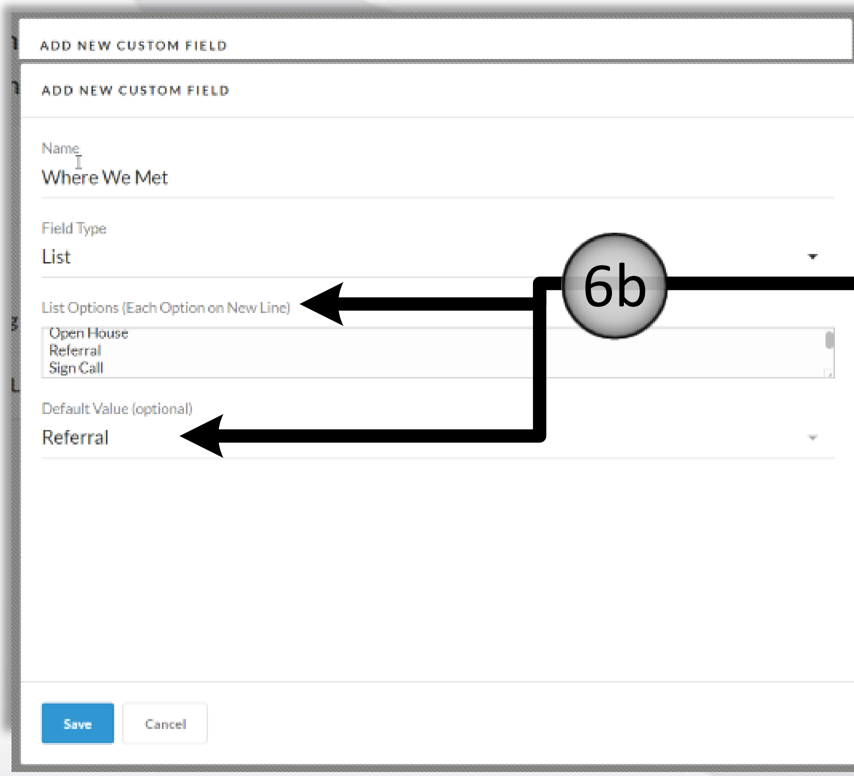
5 — The Add New Custom Field window opens, and you have 3 main options; Name, Field Type and Default Value. Lists also have “List Options”.

First, give the new Custom Field a Name.

6 — Second, select the Field Type (Single-Line Text, Multi-Line Text, List or True/False Statement).

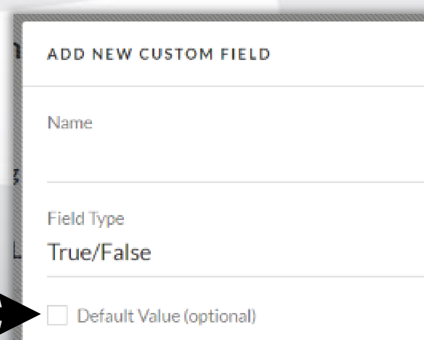
7 — Default Value is optional, and is a way to set the field to Automatically display one option, for example, if you mostly work by referral then you could set the Default Value for Where You Met the contact to “Referral”.

8 — Be sure to click Save when finished!



Default Values ONLY apply when creating a new contact

6b — When creating a List, press Enter between each Option in the list, making sure each option is on a new line. Once you have created the List you can choose a default value, if you wish.



7b — With True/False Statements, the Default Value is either Checked or Unchecked.

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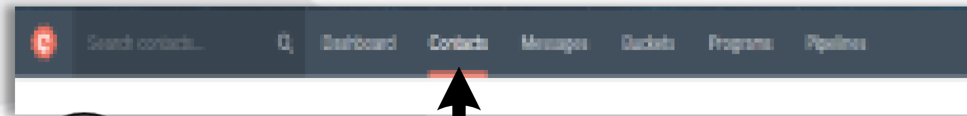
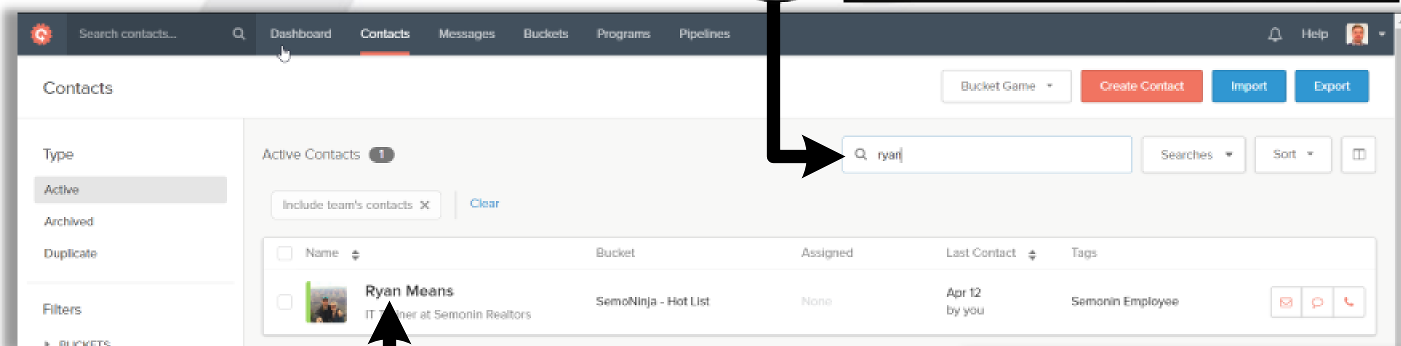
Contacts: Custom Fields

Now that we have setup our Custom Fields, lets look at how you would add these to a contact!

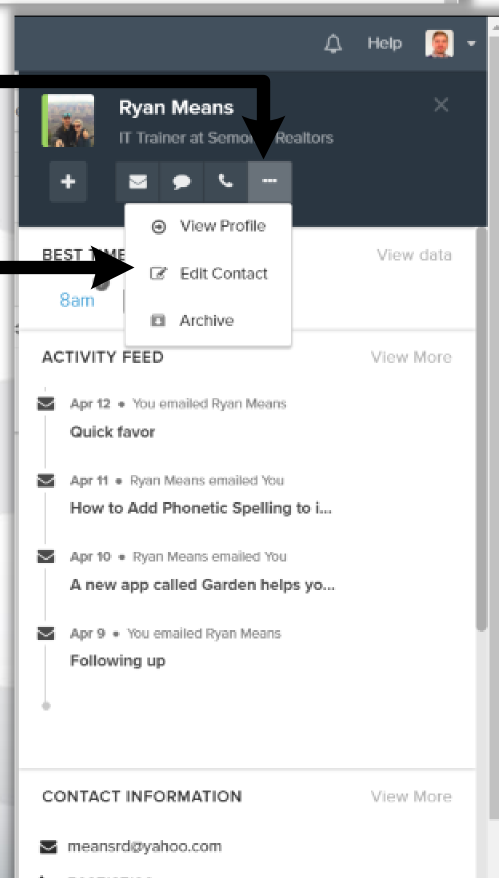


1. First, click Contacts at the top of Contactually.

2. Next, search for the contact you wish to add Custom Field info to.



3. Once located, click the Contacts Name that you want to add Custom Field info to.



4. 5. Next, the contact's Sidebar loads. Hover your cursor over the 3-dots to the right of the Email, Message and Phone icons, then click Edit Contact.

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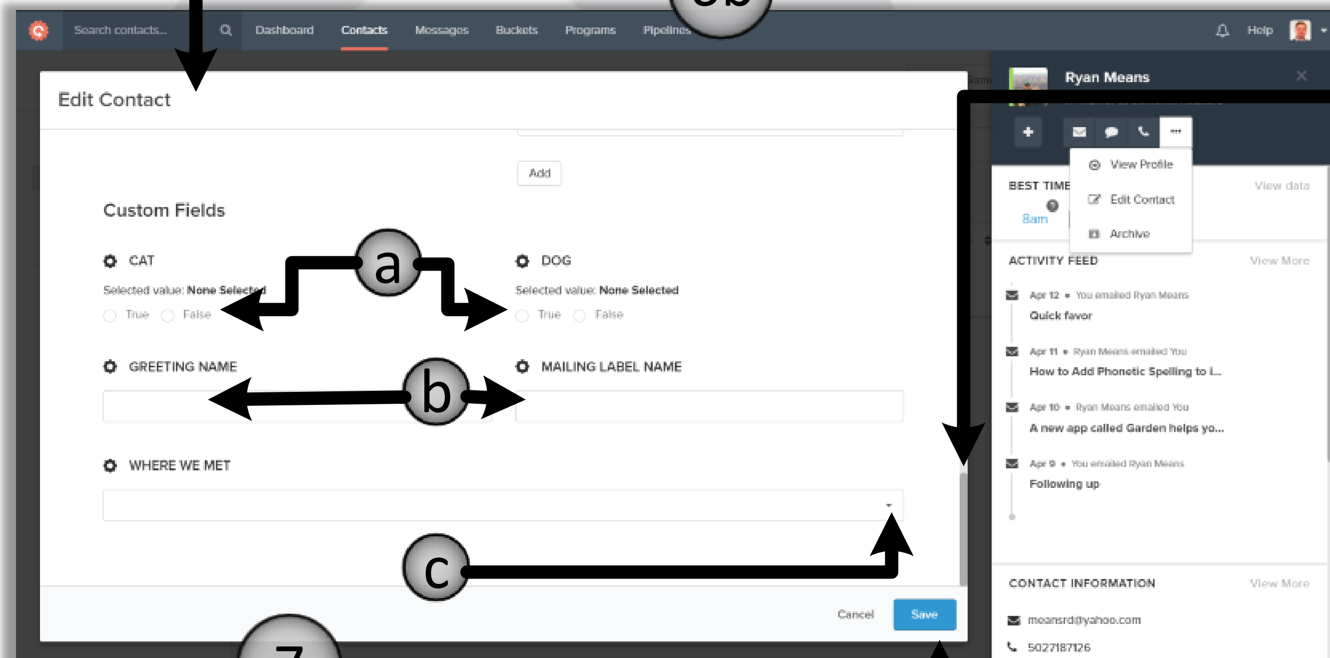
Contacts: Custom Fields

Once the contact page loads, scroll down to the bottom of the contact's details to see the Custom Fields.

6a

6b



7

For True/False Statements (**a**) you can click the corresponding value for your client. With Single or Multi-Line Text (**b**), you can simply type the value. For the List (**c**) you will see a drop-down menu, click there to select the corresponding value.

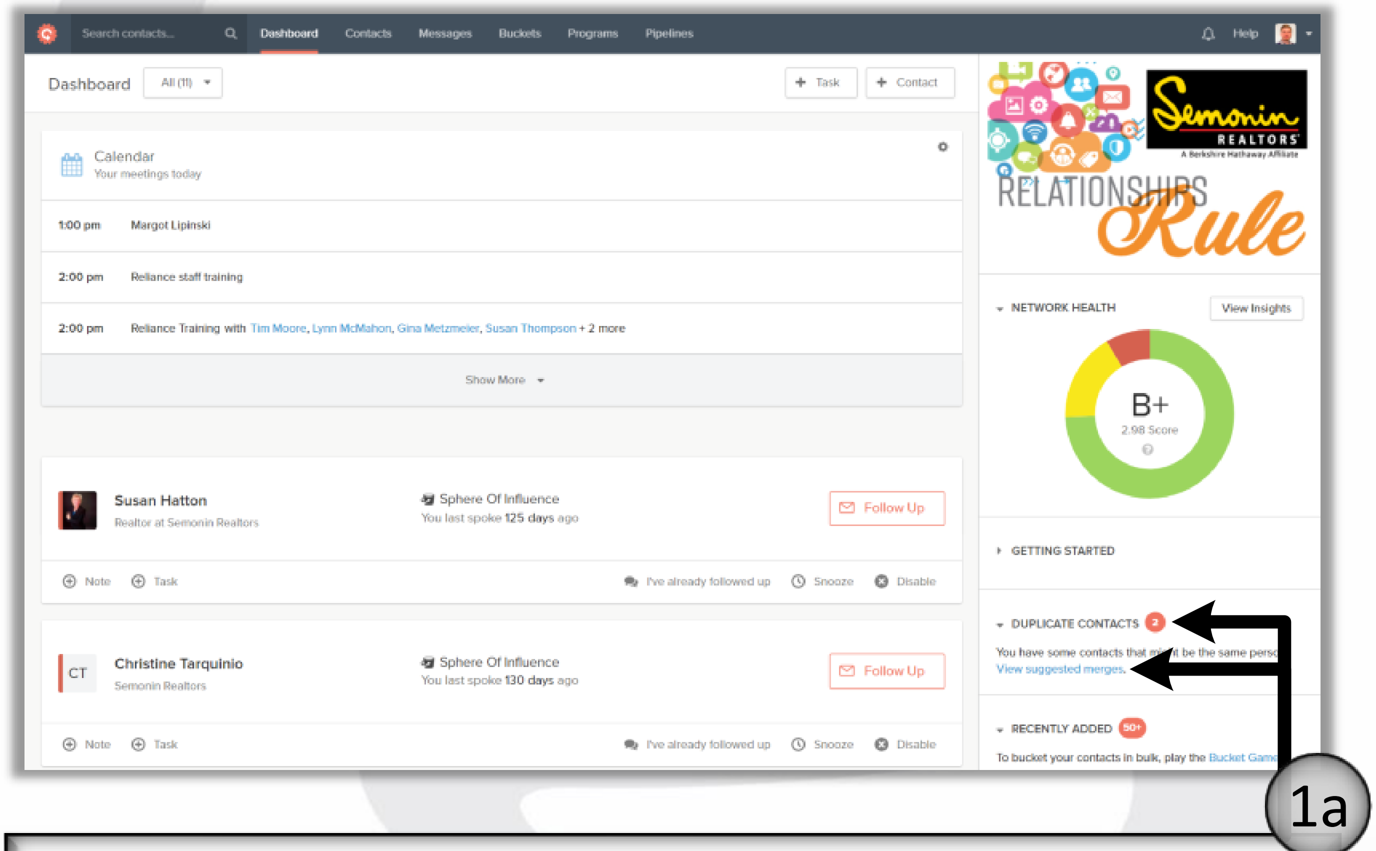
8

Once you have set the values for the Custom Fields you want to add to a contact, click Save to finish.

Contactually – Getting Started

Contacts: Managing Duplicates

Contactually is really good at handling Duplicate Contacts. One thing to note is that Contactually only scans for duplicates once a day. If you connect your email, phone and Import your CRM contacts, it is highly likely that you will end up with at least a few duplicates. Don't worry about them initially, you will be prompted once Contactually has scanned your contacts and located any duplicates. Merge Duplicates is a non-destructive process, meaning any contact info that the "duplicate" had that was not on the Original was merely added to the Original contact record. Any info that was on the Original contact will remain on the contact as well.

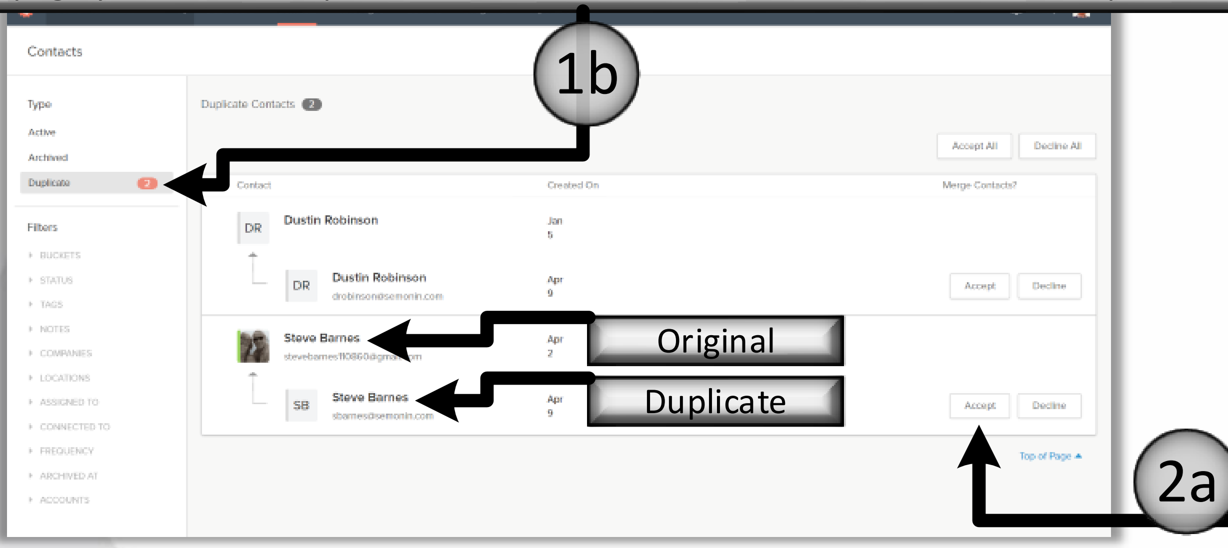


When Contactually see Duplicates in your contact database you will see a Red number next to Duplicate Contacts on the Dashboard and on the Contacts page. Click View Suggested Merges to review the duplicates and decide how they are merged.

Contactually – Getting Started

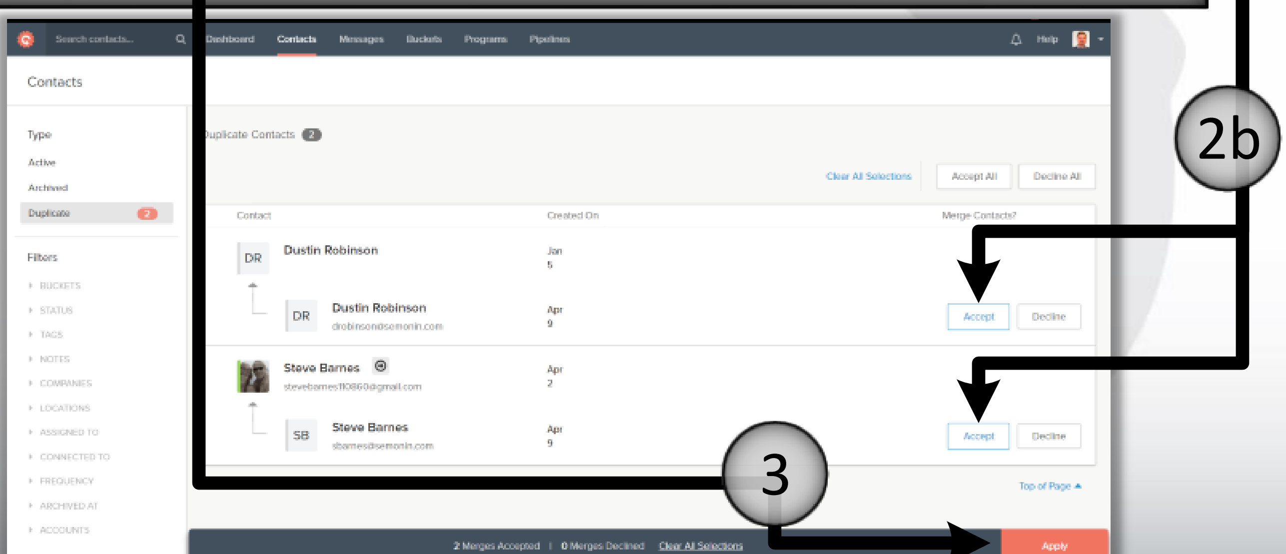
Contacts: Managing Duplicates

Merging Duplicates takes place in the Contacts section of Contactually. On the left of the Contact page you will see Duplicate with a Red Number next to it, if there are duplicates.



When you are viewing your Duplicate Merge Suggestions you will see any contacts that Contactually believes are duplicates, with the Original contact showing first, and any Duplicates showing underneath the original. If the Suggested Duplicate is indeed a duplicate contact you can click Accept to the right of the Duplicate.

When you have clicked Accept the button will turn Blue letting you know you are accepting that Merge. Once you have Accepted or Declined all the Duplicate Merge suggestions click Apply at the bottom of the page to actually merge the contacts.

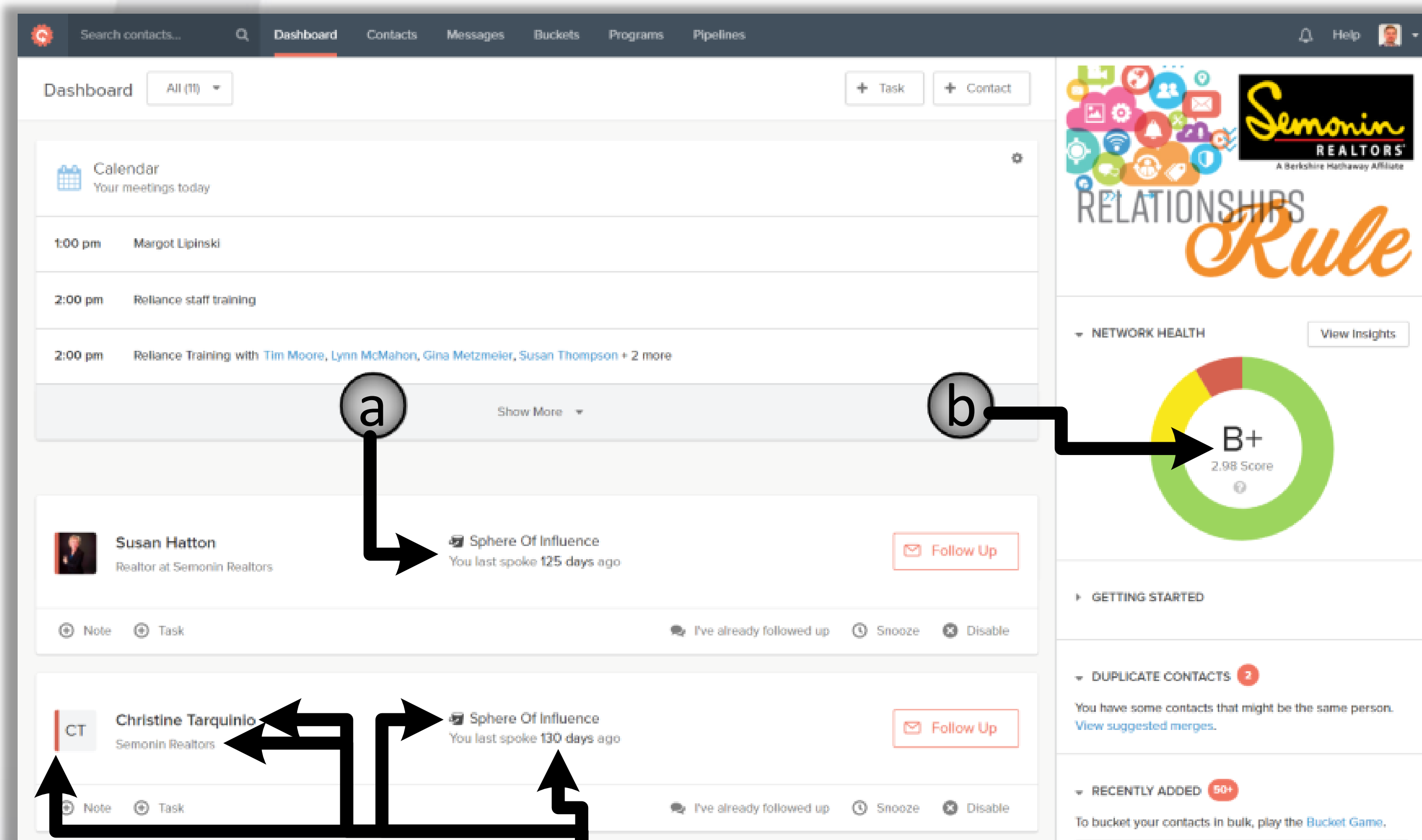


Contactually – Getting Started

Dashboard: Follow Up Reminders & Tasks

Two of the Contactually's main features will not show on your dashboard until you have organized your contacts into Buckets. The first is the Follow Up Reminders (**a**). Buckets tell Contactually how frequently to Follow Up with your contacts, which means contacts MUST be in buckets to receive a Follow Up Reminder. The second feature is called your Network Health. The status of your Network Health (**b**) is determined by how many of your Bucketed contacts you are "In-Flow" with.

****Being In-Flow means you are connecting with your Relationships within the recommended time frames****



Each Follow Up Reminder includes the client's Name, Title and Employer, Bucket, how long since the last time you contacted them, and a color showing your "Health Score" with that client. Red means you are Out of Flow, yellow means your Flow is Fading (Contactually calls this a "Weak Contact") and green means you are In-Flow.

Contactually – Getting Started

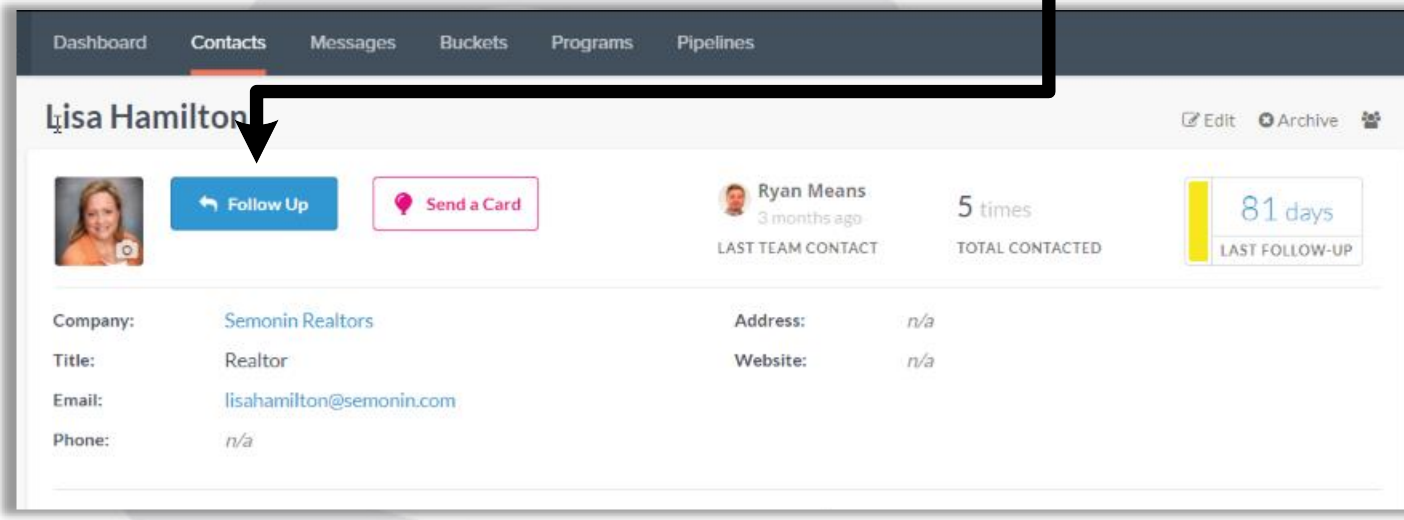
Contacts: Follow Up

Now that your database has been loaded to Contactually, and you have bucketed some contacts, you will start getting Follow-Up notifications. You will see a daily email (**a**) reminding you who to connect with, a section on Contactually's Dashboard (**b**), and a section in the App (**c**) if you have downloaded it and logged in.

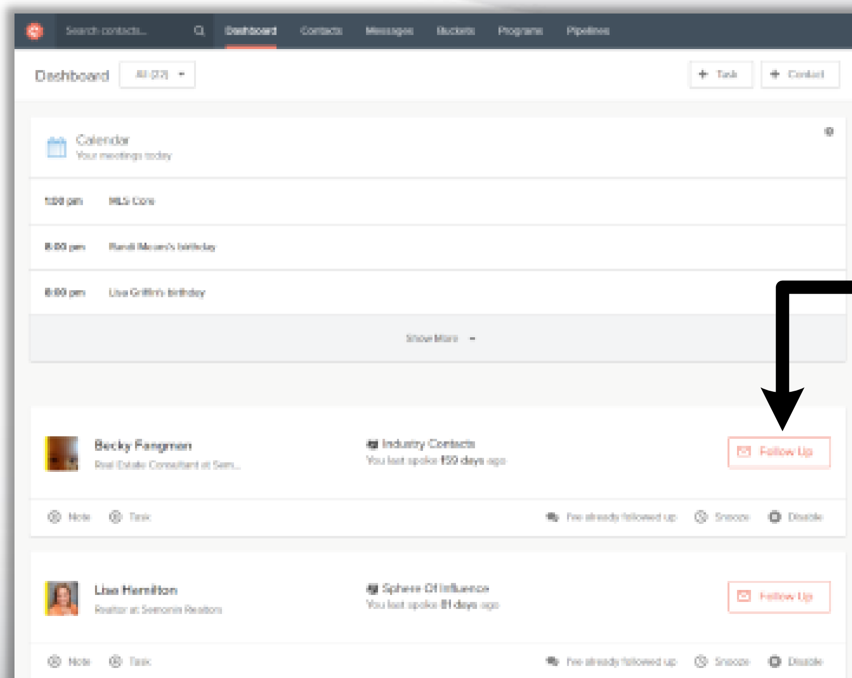
Contactually – Getting Started

Contacts: Follow Up

If you click a Contact's name from the Daily Email you will be taken to the Contact's profile in Contactually. From there you will see the Follow Up button.



The App and Contactually's Dashboard both have Follow Up buttons built in.

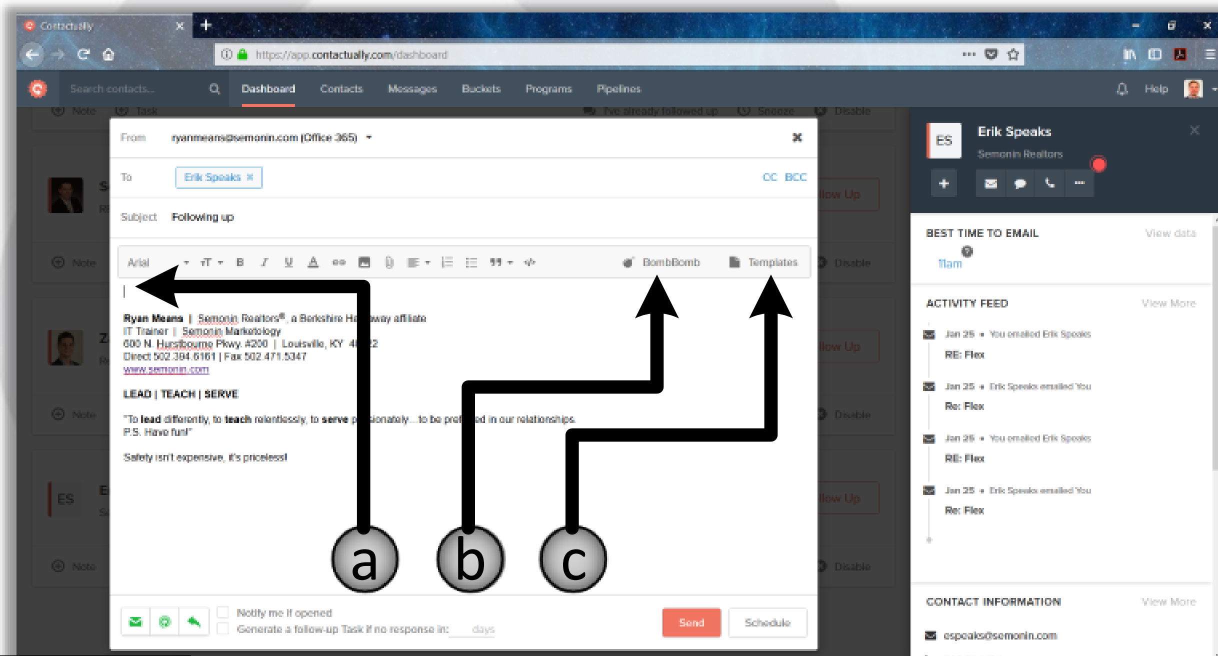


Mobile App

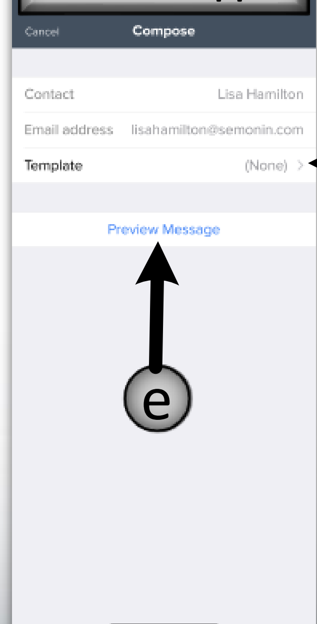
Contactually – Getting Started

Contacts: Follow Up

Clicking Follow-Up from either the Dashboard or Contact Profile on the web opens up a new email window. Here you can type out a custom email (**a**), select a template (**c**) or record a BombBomb video (**b**) and email it directly from Contactually (you must already be a BombBomb user to send BombBombs from Contactually).



Mobile App



The App gives you the option to Select a Template (**d**), or go straight to Preview Message (**e**), where you can enter a custom message to your client.

Templates

Mobile App

Contactually – Getting Started

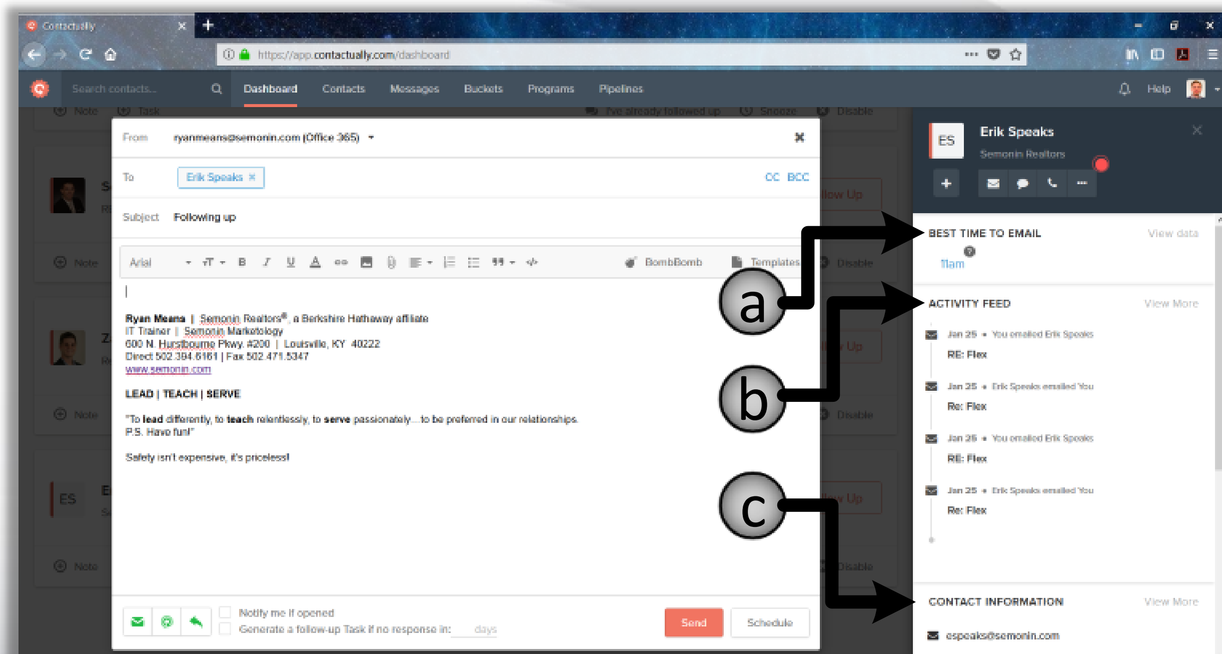
Contacts: Follow Up

On the website the Follow-Up window has some additional features that are more than worth mentioning. First, there is the Contact Sidebar, which contains info on the best time to contact your client, as well as recent activity with that client, and their contact information. Lets break each down.

<u>Best Time to Email</u> (a): This is determined by the time of day your contact normally responds to your emails, or emails you themselves. Emails sent using the Best Time to Email function increase the reply rate by an average of 20%!

<u>Activity Feed</u> (b): The activity feed shows you recent Interactions, like emails, calls and text messages (if you have them syncing). Knowing your most recent activity can help you know what to say!

<u>Contact Information</u> (c): When available Contactually will display your client's Social Profiles along with their Contact Information. Sometimes you need a reason to call or email. A quick hop into their social media profiles can show you what has been going on in their life, and maybe show you a Real Estate related pain or pleasure that you can help them with!



Contactually – Getting Started

Downloading the Mobile App

Contactually has both an iOS and Android version of their App. We highly recommend you install the App on your Phone. Click the button for your respective device, or go to your device's App Store and search for Contactually.

Download on the App Store

GET IT ON Google Play

App Features

iOS:

- View, edit, and add contacts.
- Sync contacts from your phone to Contactually.
- Complete Follow-Ups by email, SMS or MMS text, or with a phone call.
- Use Templates for email or text Follow-Ups.
- Receive Email Open Notifications.
- Bucket contacts.
- See, create, and edit Tasks.

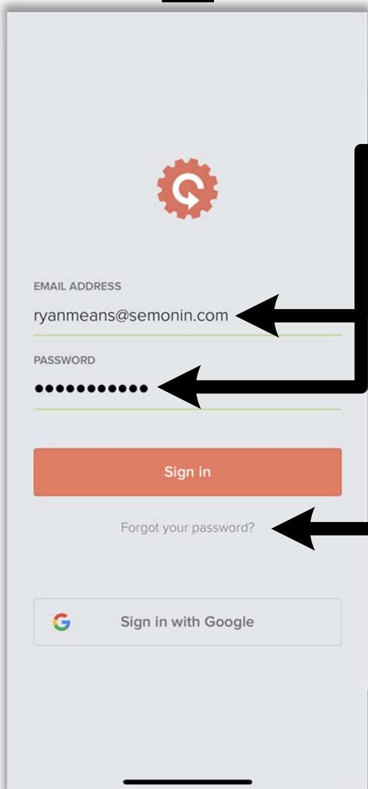
Android:

- View, edit, and add contacts.
- Sync contacts from your phone to Contactually.
- Complete Follow-Ups by email, SMS or MMS text, or with a phone call.
- Use Templates for email or text Follow-Ups.
- Receive Email Open Notifications.
- Bucket contacts.
- See, create, and edit Tasks.
- Banner notifications for Follow-Ups, lead and contact assignments, and Email Open Notifications.
- Automatically log inbound and outbound text messages and phone calls (only calls longer than 15 seconds).

Contactually – Getting Started

Using the Mobile App

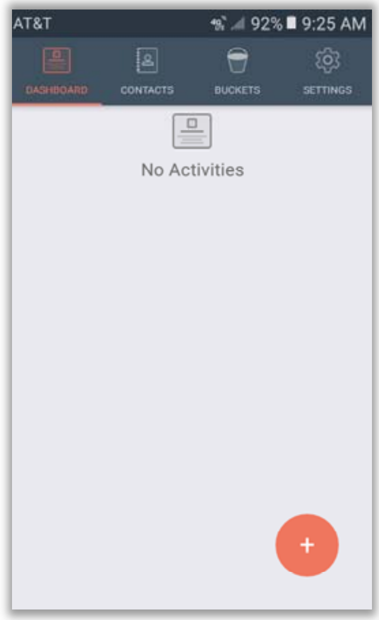
iOS

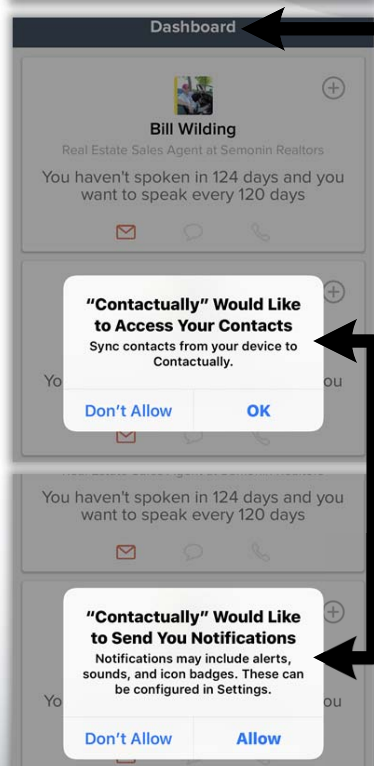


Once installed you will need to sign in with your Semonin Email Address and the password you created when you started working with Contactually.

If you forgot your password, you can always tap Forgot your Password under the sign in button to reset your password.

Android

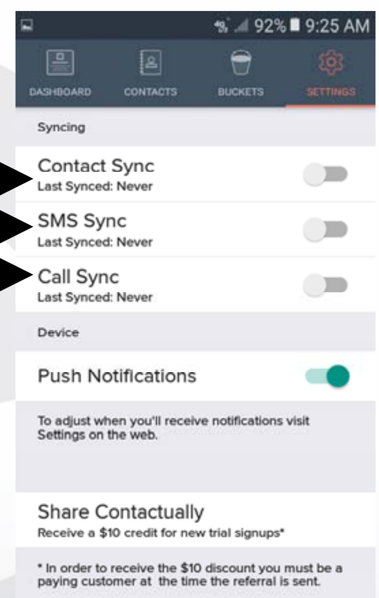




Once signed in to the Contactually App, you will be taken to the Dashboard.

On iOS Devices you should get 2 popups, the first asking for access to your contacts and the second asking for notification permissions.

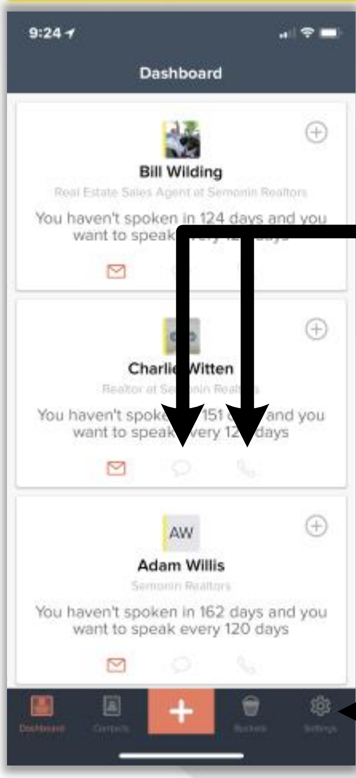
On Android Devices you have 3 settings to consider, Sync Contacts, Sync SMS and Sync Calls. If turned on, all Contacts, SMS or Phone Calls will automatically sync to Contactually.



****If you want to make the most of Contactually we recommend Allowing Notifications and Access to Contacts.****

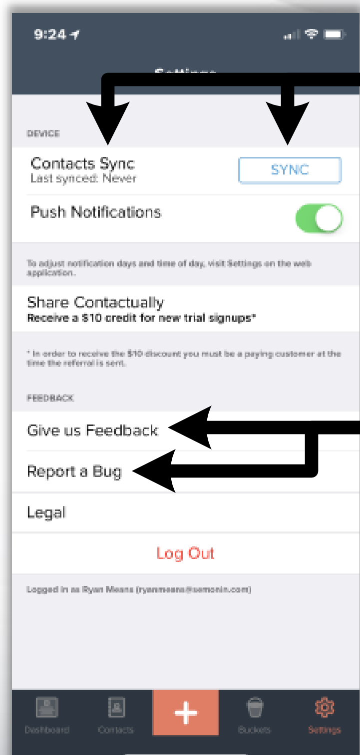
Contactually – Getting Started

Using the Mobile App



Once you have signed in, and your permissions are set, you will see the dashboard. The Dashboard is where you will be able to see your tasks and Follow Up Reminders for today. If a contact has a phone number you will see the option to initiate a text message or phone call. Doing so from inside the Contactually App will record an Interaction to that contact's activity record, and will reset the reminder time frame for that contact. This is the only way to "automatically" record calls and texts on iPhones.

Each time you open the Contactually App on your iPhone your contacts will sync from your phone to Contactually, adding your new contacts, and updating existing contacts. If you feel the sync has stopped working, tap settings from the App.

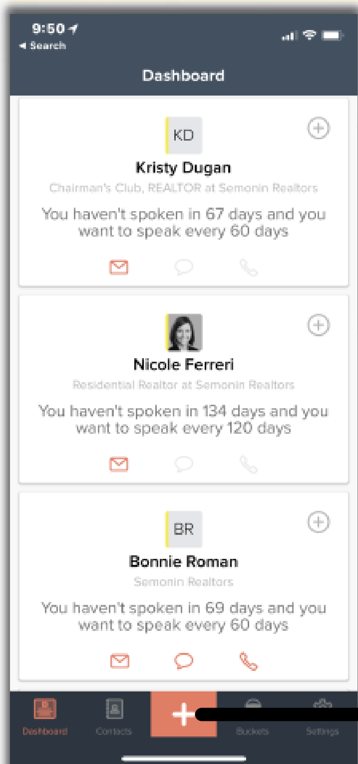


Once in settings you can tap Sync to force your iPhone contacts to sync. You can also see the last time the App synced your contacts.

If you are having issues with the app, feel free to tap Report a Bug to report it directly to the Contactually App team. You can also tap Give us Feedback if you have suggestions to improve the app!

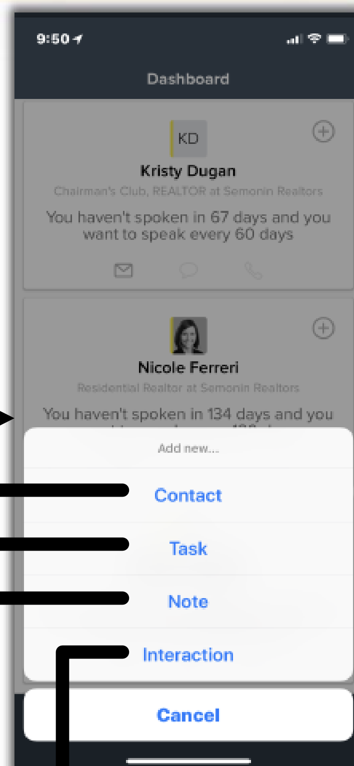
Contactually – Getting Started

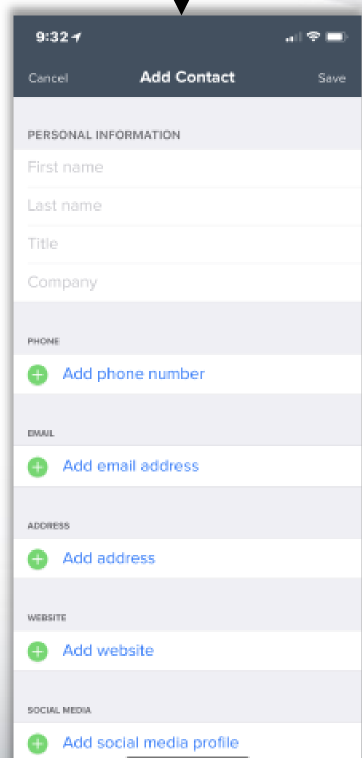
Using the Mobile App

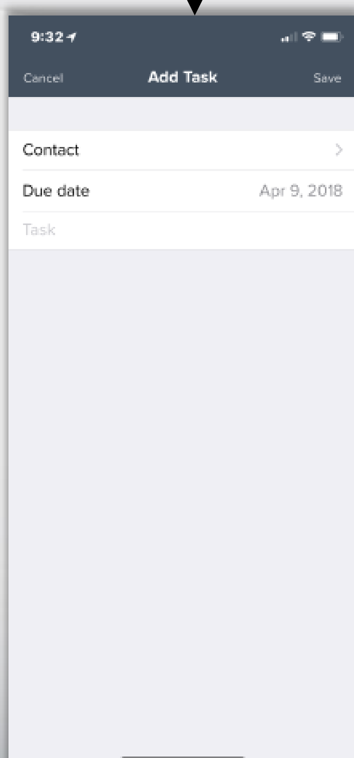


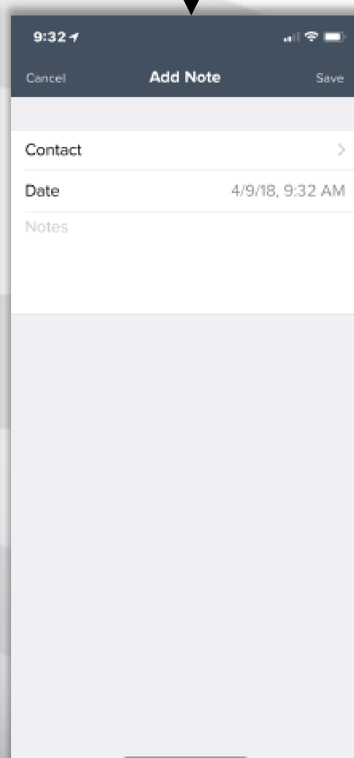
From anywhere in the App you can tap the + to add a:

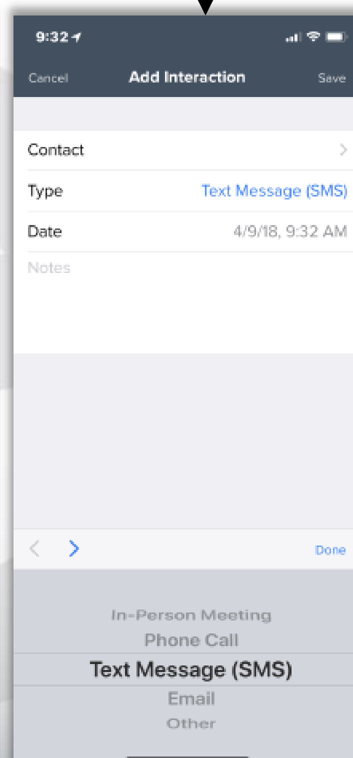
1. **Contact** (New Contact)
2. **Task** (A Reminder to do Something)
3. **Note** (Information about a contact)
4. **Interaction** (Activity that resets contact reminder timer)











Semonin REALTORS
A Berkshire Hathaway Affiliate

For questions contact:

Ryan Means
IT Trainer
Marketology Services
502-394-6161
ryanmeans@semonin.com