

Hello everyone! I want to go over how to update your customer list -- Advanced version.

Lets direct attention to Customers > Customer Center and scroll down to your detailed list. You will see a column that says status---I want you to completely ignore that unless they are “working with another broker”. Why? Because any status other than active is going to turn OFF your email campaigns to them. (This does not adhere to Ninja practices, and certainly is NOT a good thing!).

NAME	STATUS	LEAD SOURCE	LAST ACTIVE	LAST TOUCH	MARKET WATCH	SAVED SEARCHES	SAVED PROPERTIES	DRIP CAMPAIGNS	NOTES	REQUESTS	SELLER REPORTS	TO-DOS
Gregory Primerano	Closed transaction	CW	Feb. 15, 2020	Feb. 15, 2020	0	0	0	0	0	0	0	0
Dawn Primerano	Closed transaction	CW	Feb. 15, 2020	Feb. 15, 2020	0	0	0	0	0	0	0	0
Regina Loso	Active	CW	Feb. 15, 2020	Feb. 15, 2020	0	0	0	0	0	0	0	0
Walid Lababidi	Inactive	CW	Feb. 15, 2020	Feb. 15, 2020	0	0	0	0	0	0	0	0
Jennifer Fernandez	Inactive	CW	Feb. 15, 2020	Feb. 15, 2020	0	0	0	0	0	0	0	0

Instead, I’m going to show you how to update their PIPELINE label! Its going to be fantastic, and it is going to get us prepared for the next advanced course which is Pipeline Manager!

First, I’m going to open the first guy on this list. If you already have status = to closed transaction, we are going to change status back to active, and change our label to closed. Here is how. Click on the customer name to open the profile and click on “edit profile”

Profile

Edit Profile

Gregory Primerano Engagement Score: 0%

Status: Groups: LoLo-Akron Labels: No labels set

Primary Email: geprim@gmail.com **Send Ecard**

Global Email Opt Out: Opted in **View Subscriptions**

Notes

Add New Note

No notes

Fix the drop down on Status back to “active” and click on the labels box and chose the appropriate label for this customer. In this case it is “closed” . For a full list of labels and definitions go here:

https://docs.google.com/document/d/1nMj_el83xqQOrIRpwqiP33eOBU8y8yym19lswQx340c/edit

dit Customer



Basic Customer Information

First Name Gregory

Last Name Primerano

Primary Email geprim@gmail.com

Cell Phone (330) 903 1313

Status active

Groups LoLo-Akron

Labels

- My Labels
- Inactive
- No Mortgage Solicitation
- Pipeline Stages
- Needs Defined
- On Hold
- Inactive
- Suspect

Transaction Information

Postal Address Information

Next, if I am updating a customer to a closed label, I would go ahead and open the "transaction information" and enter the property info/date/price/type.

After you have made ANY changes, scroll down and click on DONE

Basic Customer Information

First Name: Gregory

Last Name: Primerano

Primary Email: gprim@smail.com

Cell Phone: (603) 888-2000

Status: active

Groups: LoLo-Nron X

Labels: Closed X

See More Information

Transaction Information

Property Information

Address

City: State: Zip Code

This is a: Purchase

NOTE: Once saved, these transaction details will become read only. Please verify your data before saving.

Transaction Date

Transaction Price

Transaction Type: Primary Residence

Postal Address Information

Additional Contact Information

Family Information

Close Done

Now a sneak peak of the pipeline manager and we will get to more later....if I had added in the transaction info, my \$\$ amounts would fill in as well here, but you will see I now have a purple section in my sales pipeline and if I clicked that, it would open to all the people I have under that label:

- Home
- Agent Dashboard
- Welcome
- Check Do Not Call List
- Company Roster
- Delta Media Group Blog
- Notices
- Events
- Customers
- QR Codes
- Leads
- Website
- Listings
- Marketing

0 Activities for Today

22 Active Customers

0 New Leads

Sales Pipeline



\$0.00
Potential Dollar Volume
1
New Users in Last 30 Days
22
Total Active Users
Goal
Actual YTD: \$0.00
2020 Goal: \$0.00

0
Transactions Needed to Make Goal
Average of 0 per quarter

Adjust Sales Goals