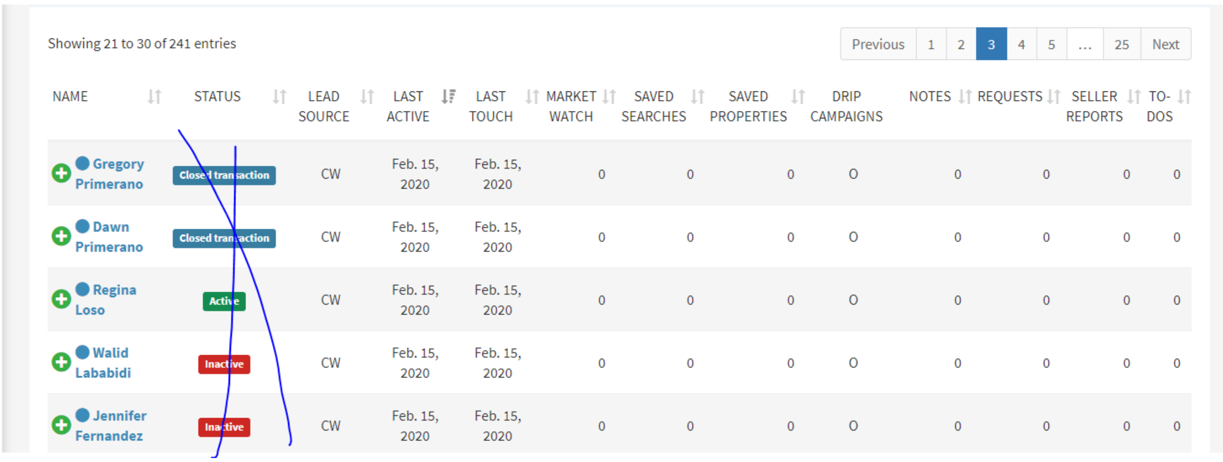
Hello everyone! I want to go over how to update your customer list -- Advanced version.

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!).



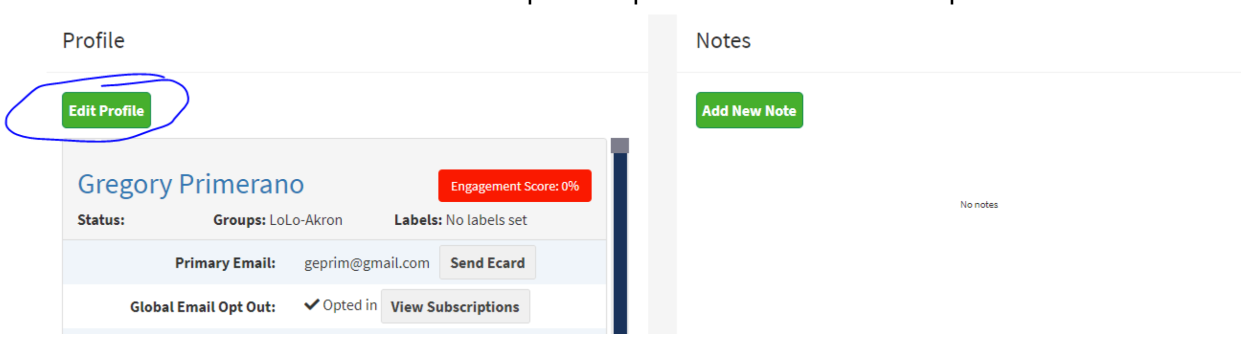
Showing 21 to 30 of 241 entries

Previous 1 2 3 4 5 … 25 Next

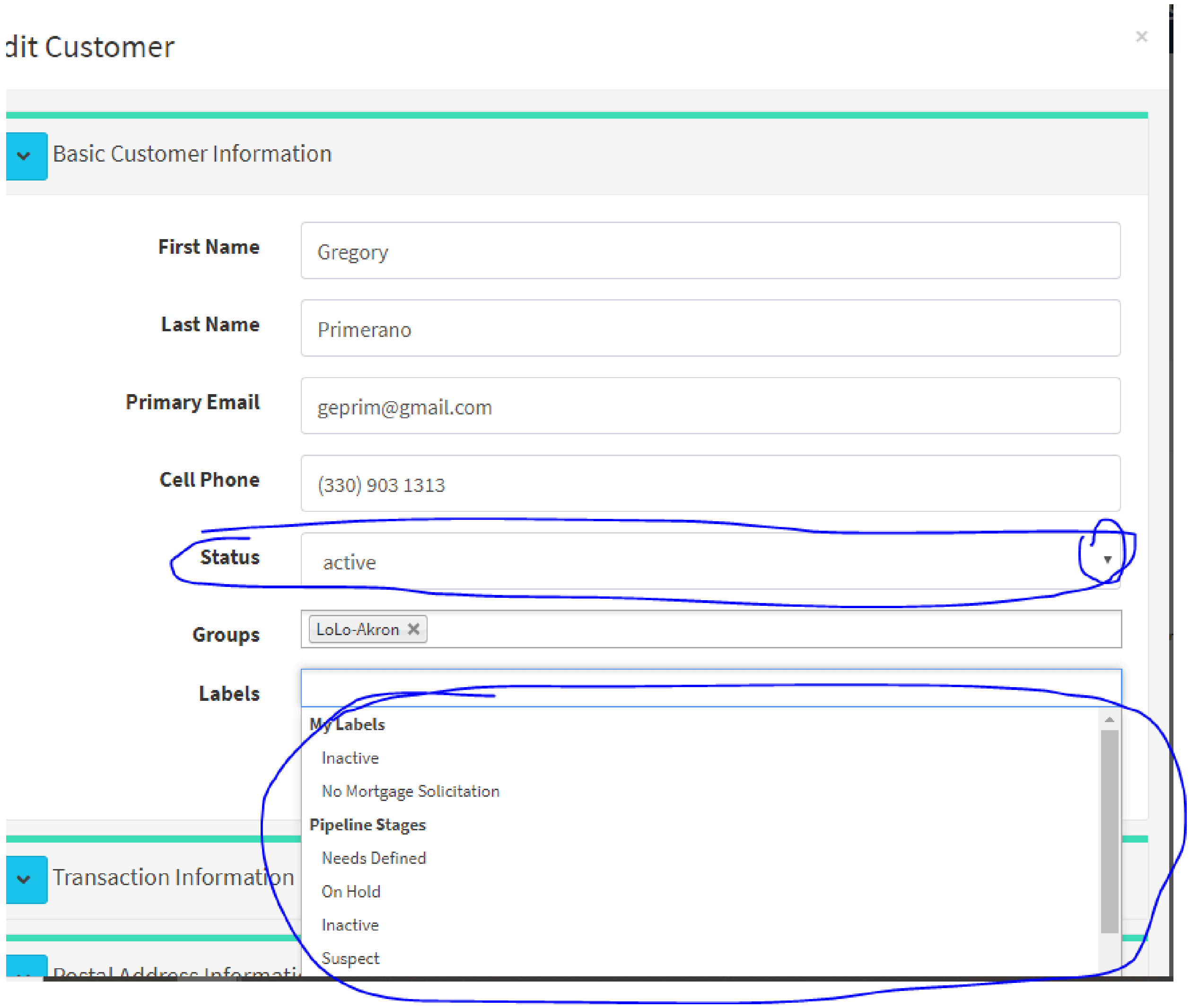
NAME	STATUS	LEAD SOURCE	LAST ACTIVE	LAST TOUCH	MARKET WATCH	SAVED SEARCHES	SAVED PROPERTIES	DRIP CAMPAIGNS	NOTES	REQUESTS	SELLER REPORTS	TO-DOS
Gregory Primerano	Closed transaction	CW	Feb. 15, 2020	Feb. 15, 2020	0	0	0	0	0	0	0	0
Dawn Primerano	Closed transaction	CW	Feb. 15, 2020	Feb. 15, 2020	0	0	0	0	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"

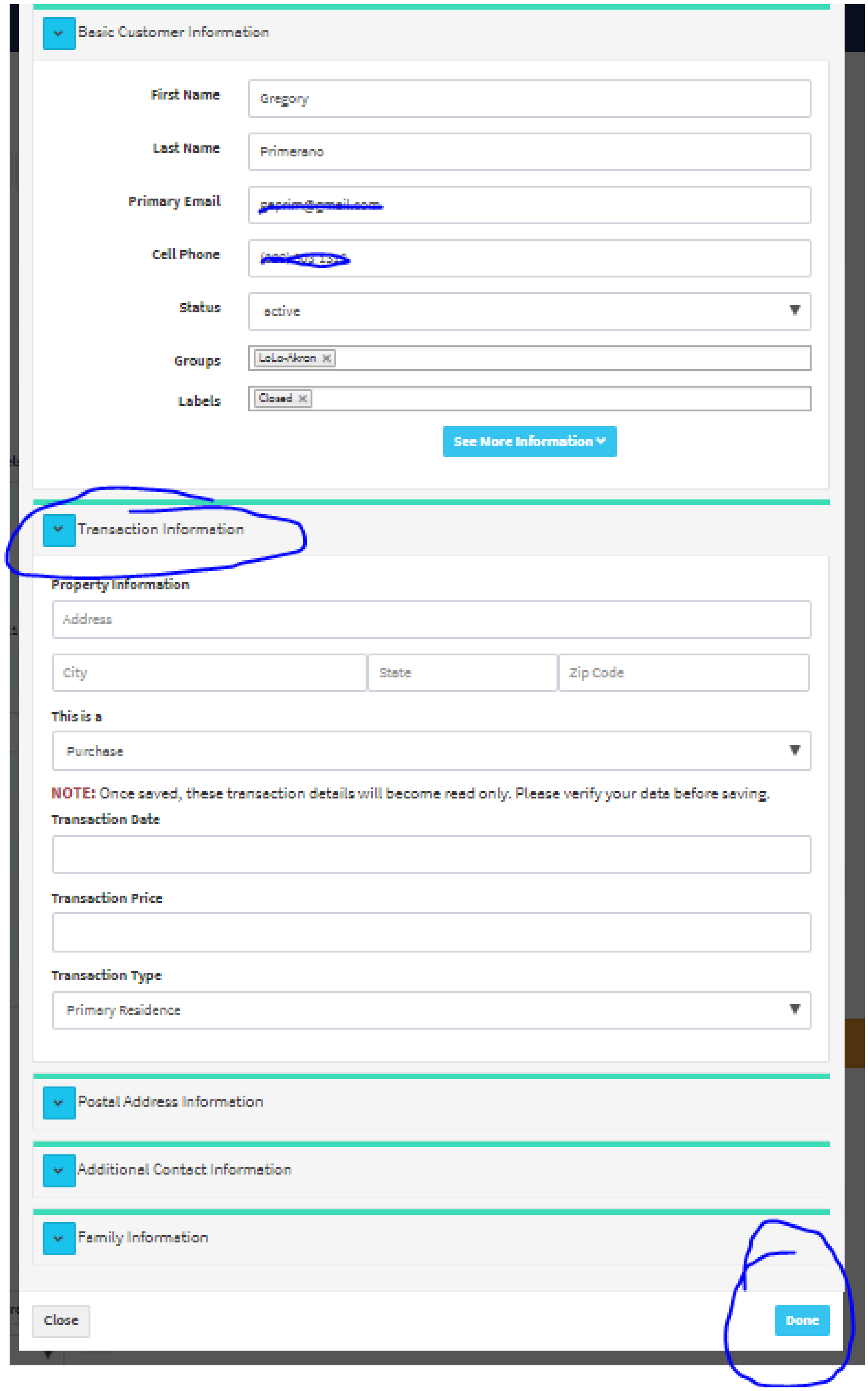


Fix the drop down on Status back to "active" and click on the labels box and chose the appropriate label for this customer. In this case it is "closed" . For a full list of labels and definitions go here: https://docs.google.com/document/d/1nMj_eI83xqQOrIRpwgiP33eOBU8y8yym19IswQx340c/edit

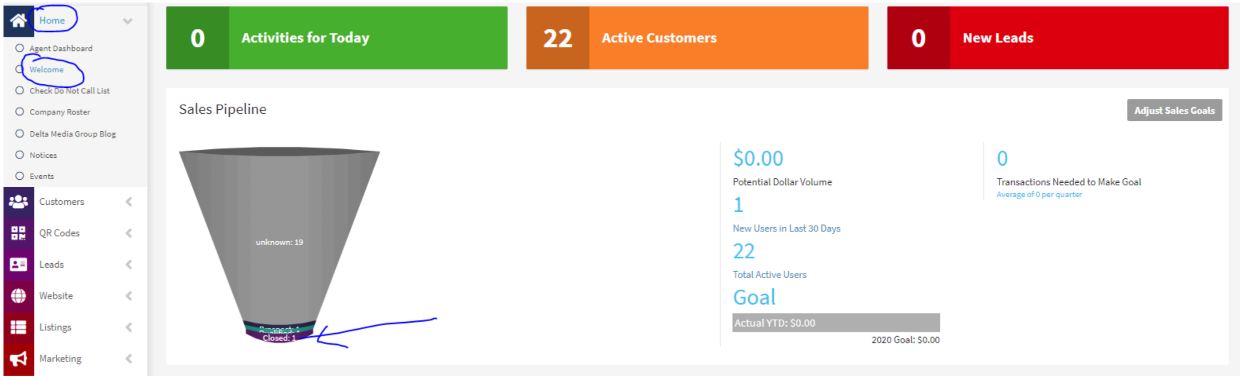


Next, if I am updating a customer to a closed label, I would go ahead and open the “transaction information” and enter the property info/date/price/type.

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



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
Adjust Sales Goals
unknown: 19
Closed: 1
$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