

Placester CRM Guide

Congratulations! You're on your way to managing and nurturing your leads better using Placester's CRM (Customer Relationship Management) software. This guide will walk you through the features included in the CRM.

Advanced Account Assistance

We are here to help! As part of your Essential or Premium subscription, you have access to Advanced Account Assistance through our Support Team. This means we can walk you through anything you may have questions about over the phone. You can reach out to us at [800-728-8391](tel:800-728-8391) Monday - Friday or send us an email at support@placester.com.

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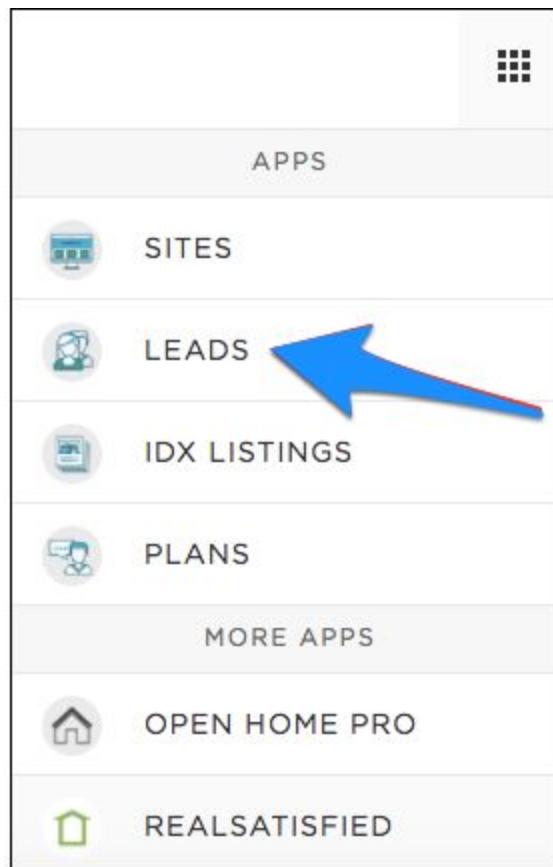
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Getting Started

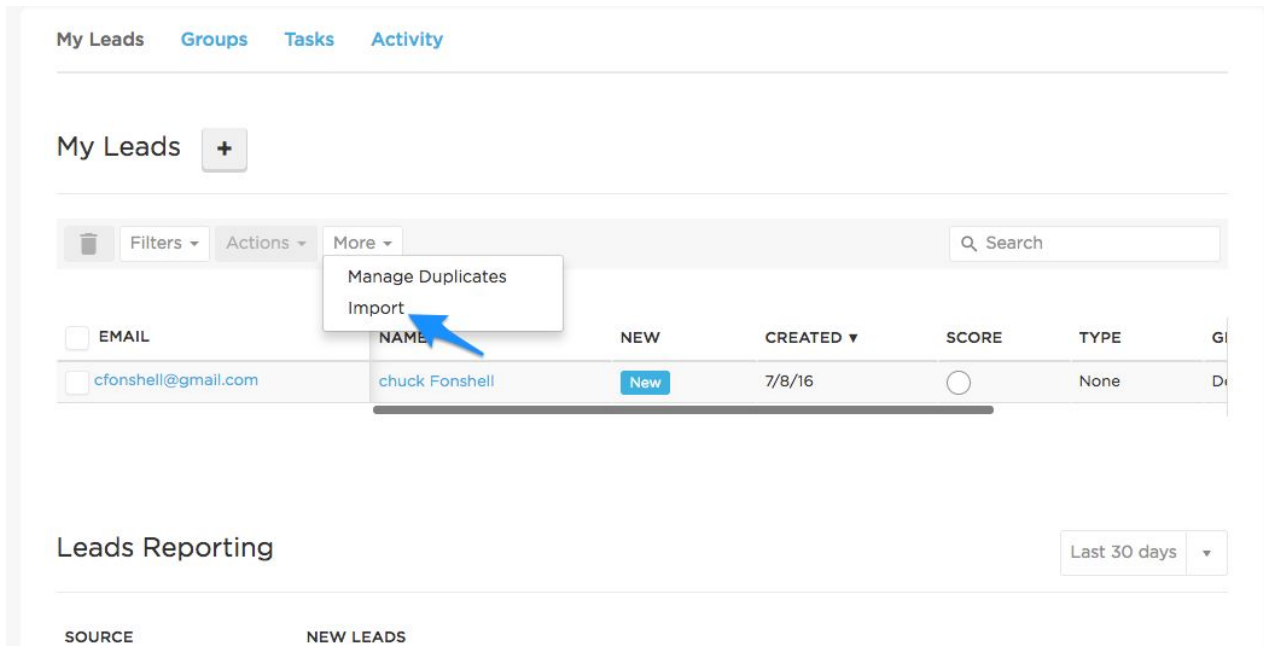
Before beginning your CRM setup, you'll want to make sure your lead capture settings are tailored to your liking. [Click here](#) to watch a video about this.

Importing Leads

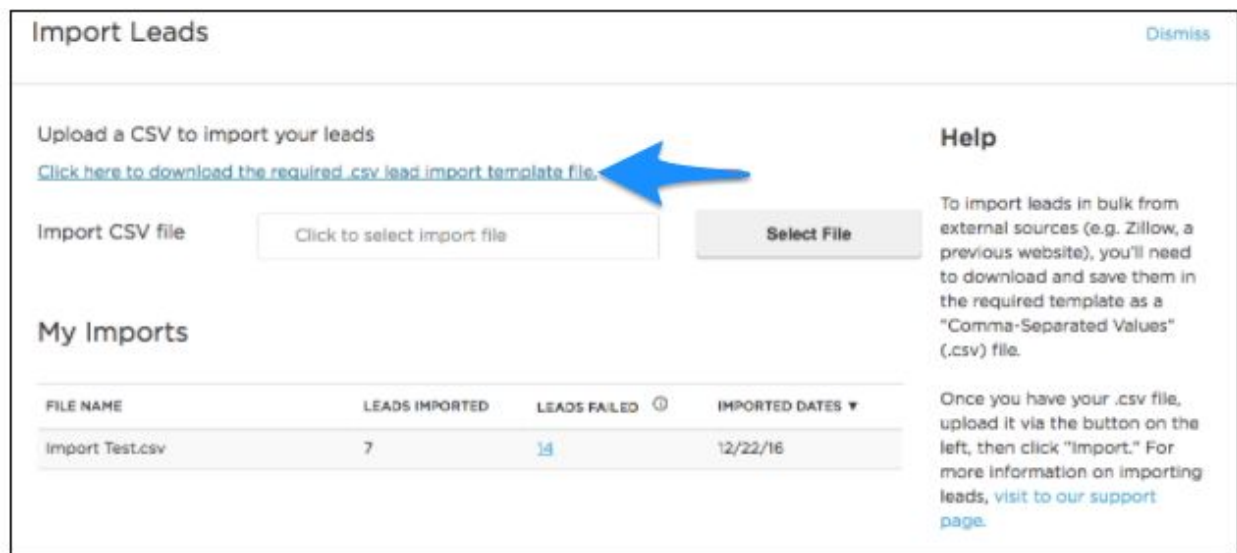
To import your leads, first log in to your Placester account. Then go to the app icon and select "leads".



Next, click the dropdown and select 'Import'.



The next screen is where you'll be uploading your leads, which will need to be uploaded via a CSV file. You'll see a link to download an example template which you should use for your lead upload.



You'll be able to view a list of completed and in progress imports. Any imported leads will be marked as NEW with a source of 'import'.

NOTE: The data should only include fields for first name, last name, email, and phone number. The import process will not import blank rows, rows with missing or invalid email addresses, invalid phone numbers or more than one phone number or email address for a lead. You'll be able to export a list of leads that did not successfully

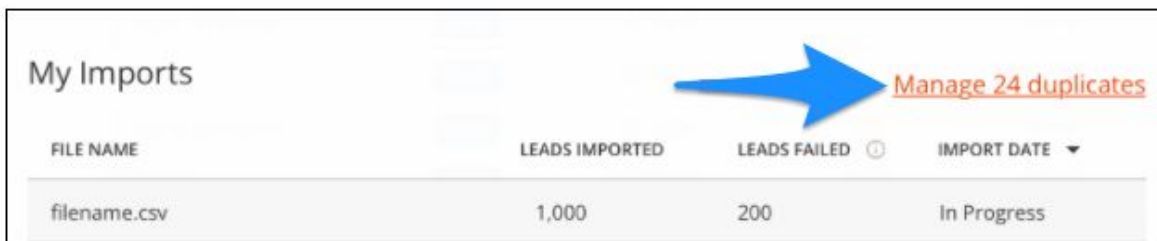
import (with the reason why) by clicking on the highlighted number in the 'Leads Failed' column.



My Imports

FILE NAME	LEADS IMPORTED	LEADS FAILED ⓘ	IMPORTED DATES ▼
Import Test.csv	7	14	12/22/16

You'll also be able to manage duplicates that arise from the import.

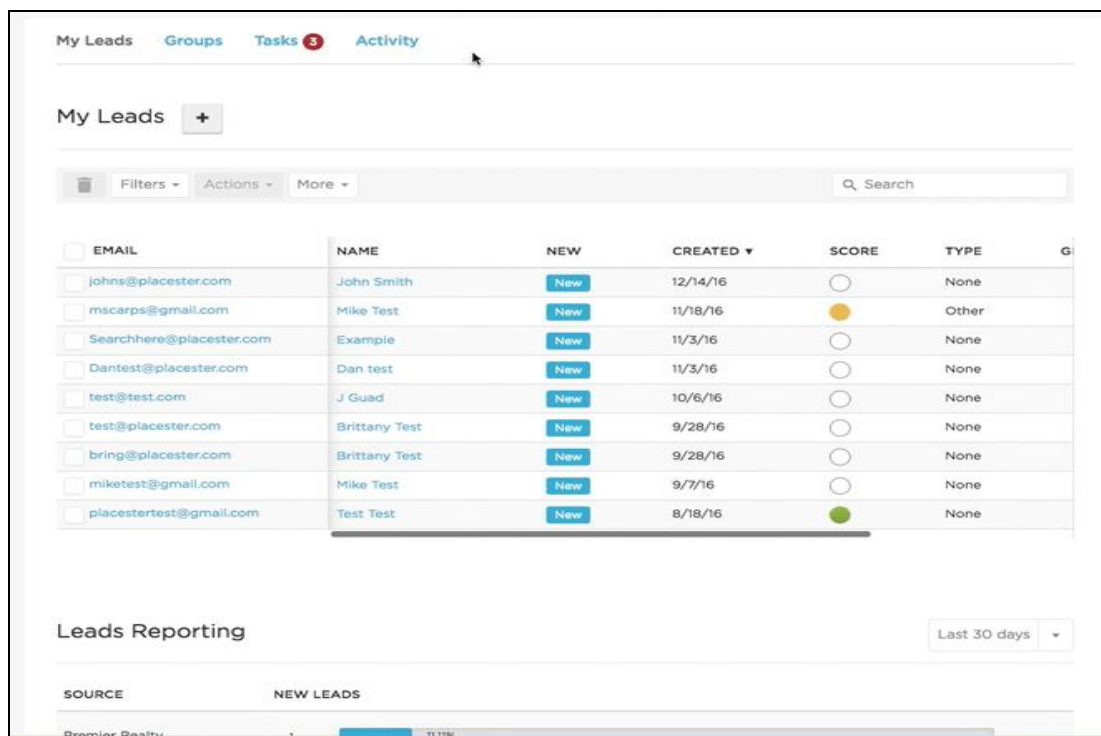


My Imports

FILE NAME	LEADS IMPORTED	LEADS FAILED ⓘ	IMPORT DATE ▼
filename.csv	1,000	200	In Progress

[Manage 24 duplicates](#)

Forwarding leads from other sites



My Leads Groups Tasks 3 Activity

My Leads +

Filters Actions More Search

EMAIL	NAME	NEW	CREATED ▼	SCORE	TYPE	G
<input type="checkbox"/> johns@placester.com	John Smith	New	12/14/16	○	None	
<input type="checkbox"/> mscarps@gmail.com	Mike Test	New	11/18/16	●	Other	
<input type="checkbox"/> Searchhere@placester.com	Example	New	11/3/16	○	None	
<input type="checkbox"/> Dantest@placester.com	Dan test	New	11/3/16	○	None	
<input type="checkbox"/> test@test.com	J Guad	New	10/6/16	○	None	
<input type="checkbox"/> test@placester.com	Brittany Test	New	9/28/16	○	None	
<input type="checkbox"/> bring@placester.com	Brittany Test	New	9/28/16	○	None	
<input type="checkbox"/> miketest@gmail.com	Mike Test	New	9/7/16	○	None	
<input type="checkbox"/> placestertest@gmail.com	Test Test	New	8/18/16	●	None	

Leads Reporting Last 30 days ▼

SOURCE	NEW LEADS
Premier Realty	1

Clicking one of the groups will take you to the details page for the group. This is where you will be able to get the routing e-mail needed to bring in leads from the respective real estate site.

In order to do this, you must first log onto your Placester account, click on the Application button and then click on Leads. Then, go to the Groups tab. Under the groups tab, you will see all the groups you created and groups for sites such as Zillow, Homes.com, Realtor.com, and Trulia (see below).

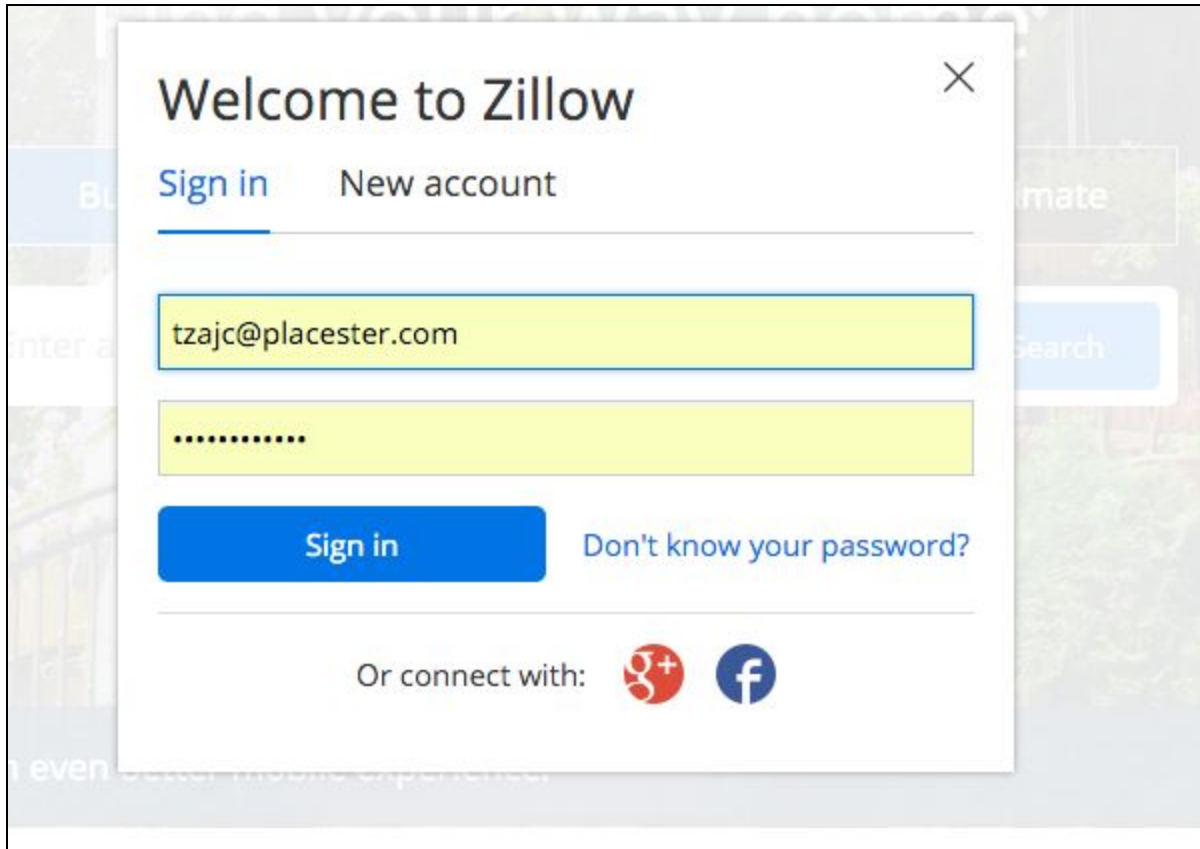
The screenshot shows the 'Details' page for a group named 'Trulia'. The page has a navigation bar with 'My Leads', 'Groups', 'Tasks' (with a red notification badge), and 'Activity'. The 'Details' section includes fields for 'Name' (Trulia), 'Source' (Trulia), and 'Plan' (Select Plan). A blue box highlights the 'Routing Email' field, which contains a long alphanumeric string followed by '@myrealestateplatform.com'. To the right of the email is a 'Copy Email Address' link. Below the email field is a 'Created' date of '3/26/16'. A green 'Save' button is located to the right of the 'Created' field. Below the details section is a 'Recent Leads' section with the text 'No leads in this group' and a link 'View all leads in this group'. At the bottom, there is a table with columns: NAME, NEW, SCORE, TYPE, CONTACTED, and CREATED. The footer of the page says 'Powered by Placester'.

Now that you have the forwarding e-mail address, you will need to log into the respective real estate site and input the e-mail address as shown below.

Important note: Forwarding from Zillow/Trulia is temporarily unavailable due to some adjustments being made to the upload process.

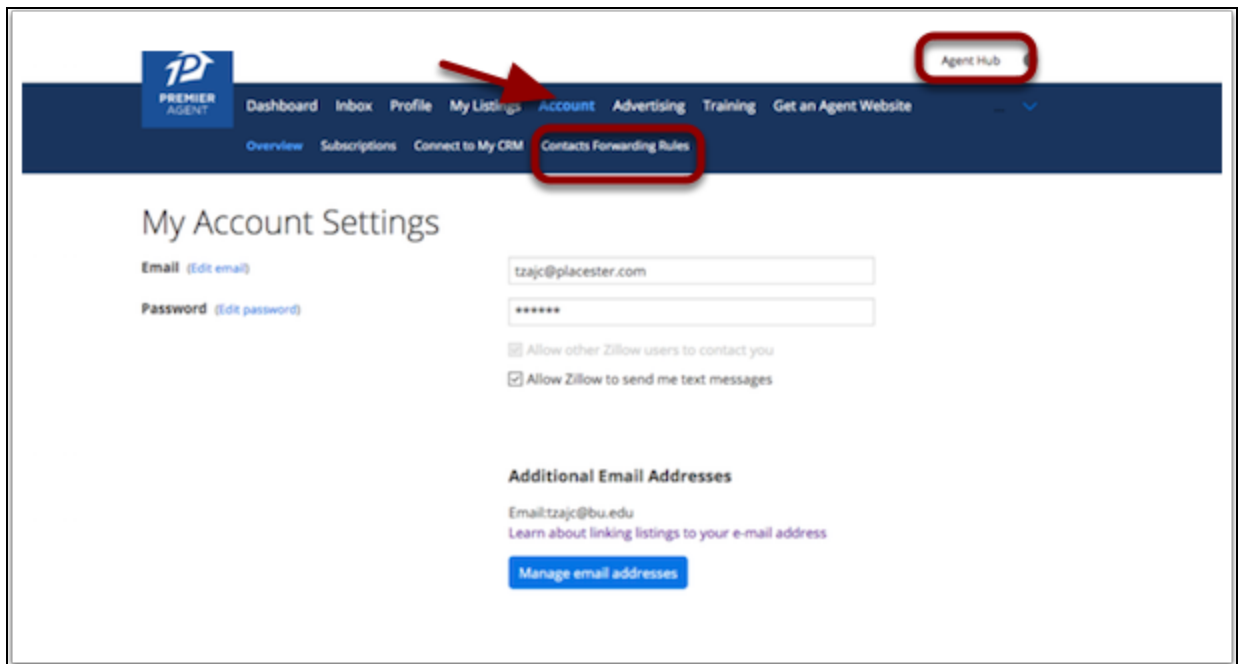
Zillow

In order to forward the leads from Zillow over to your Placester CRM, you will need to sign into your Zillow Premier Agent account at zillow.com



A white login modal with a close button (X) in the top right corner. It features the heading "Welcome to Zillow" and two links: "Sign in" (underlined) and "New account". Below these are two yellow input fields: the first contains the email "tzajc@placester.com" and the second contains masked characters "*****". A blue "Sign in" button is positioned to the left of a blue link "Don't know your password?". At the bottom, it says "Or connect with:" followed by Google+ and Facebook icons.

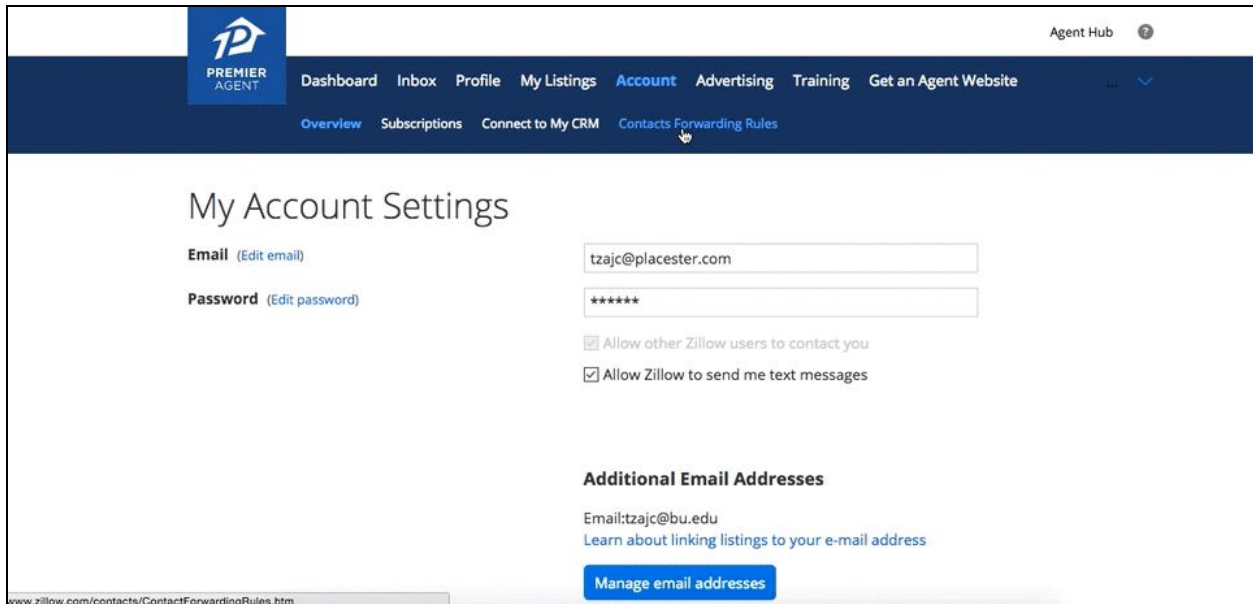
Once you are logged in, you will need to click on Agent hub at the top right of the page. Here, you will click on the Account tab and then go to Contact Forwarding Rules.



The Zillow Premier Agent dashboard interface. The top navigation bar includes links for Dashboard, Inbox, Profile, My Listings, Account, Advertising, Training, and Get an Agent Website. The "Agent Hub" dropdown menu is circled in red. Below the navigation bar, the "Account" tab is selected, and the "Contact Forwarding Rules" link is circled in red. The main content area is titled "My Account Settings" and includes fields for Email (tzajc@placester.com) and Password (*****). There are checkboxes for "Allow other Zillow users to contact you" and "Allow Zillow to send me text messages". Under "Additional Email Addresses", it shows "Email: tzajc@bu.edu" and a link to "Learn about linking listings to your e-mail address". A blue button labeled "Manage email addresses" is at the bottom.

Once you click on Contact Forwarding Rules, where you can add custom rules for your account. On this screen, you will click New Rule, which will take you to the screen

below. Here you will be able to choose the forwarding settings and input the Placester forwarding e-mail for the Zillow group under "Recipient's E-mail Address". After saving, all that fall within the rule you created will be sent to your Placester CRM. (see gif)



Agent Hub

Dashboard Inbox Profile My Listings **Account** Advertising Training Get an Agent Website

Overview Subscriptions Connect to My CRM **Contacts** Forwarding Rules

My Account Settings

Email (Edit email) tzajc@placester.com

Password (Edit password) *****

☒ Allow other Zillow users to contact you

☒ Allow Zillow to send me text messages

Additional Email Addresses

Email:tzajc@bu.edu

[Learn about linking listings to your e-mail address](#)

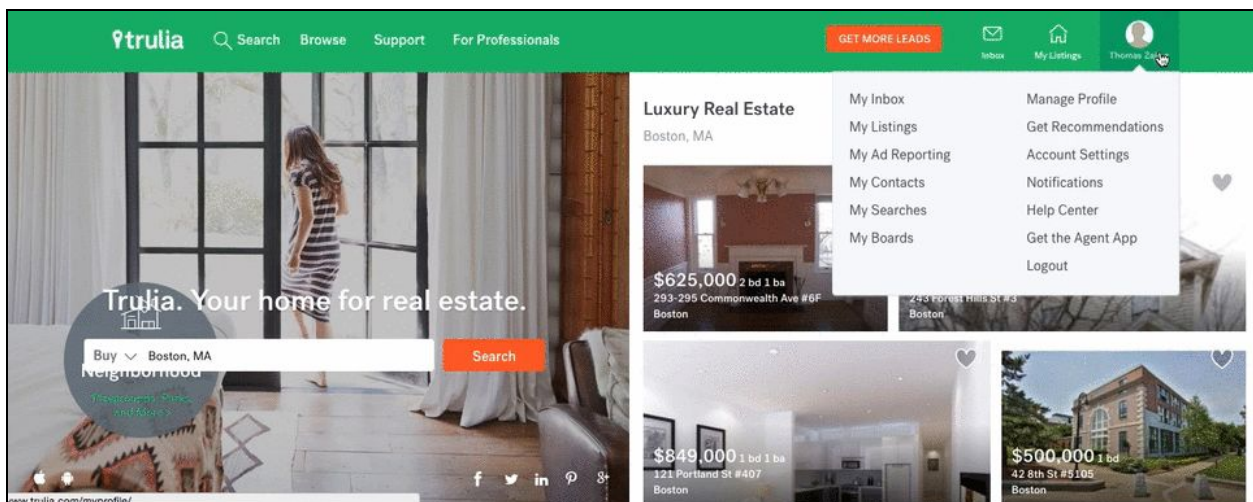
[Manage email addresses](#)

www.zillow.com/contacts/ContactForwardingRules.htm

Trulia

Since Trulia is now an extension of Zillow, the process to have your leads forwarded is very similar, you will just need to log in through trulia.com first.

Once you're logged in, you will be taken to your profile. At the top right of the profile, you can go to account settings as shown below.



trulia Search Browse Support For Professionals

GET MORE LEADS

Inbox My Listings Thomas Z...

Trulia. Your home for real estate.

Buy Boston, MA

Search

Luxury Real Estate
Boston, MA

My Inbox
My Listings
My Ad Reporting
My Contacts
My Searches
My Boards
Manage Profile
Get Recommendations
Account Settings
Notifications
Help Center
Get the Agent App
Logout

\$625,000 2 bd 1 ba
293-295 Commonwealth Ave #6F
Boston

\$849,000 1 bd 1 ba
123 Portland St #407
Boston

\$500,000 1 bd
42 8th St #5105
Boston

www.trulia.com/myprofile/

After clicking on account settings, you will be taken to the Zillow Premier Agent Account tab shown below and you can follow the instructions above from then on and input the e-mail found under the Trulia group in the lead section of the back-end.

My Account Settings

Email (Edit email)

Password (Edit password)

☐ Allow other Zillow users to contact you

☒ Allow Zillow to send me text messages

Additional Email Addresses

Email: tzajc@bu.edu
[Learn about linking listings to your e-mail address](#)

[Manage email addresses](#)

Homes.com

To add the lead routing email at Homes.com, login to your account and click the Apps icon at the top of the page, then My Profile.

HomesConnect Apps My Applications

Leads & Contacts
[Manage Leads](#) | [Contacts](#) | [Buyer Profiles](#)
[Lead Gator Setup](#) | [Prospects](#) | [Tasks](#)

Email Marketing
[Send Email](#) | [Campaigns](#) | [Message Library](#)

Listings
[Listings](#)

Business Intelligence
[Local Connect Report](#)

Social Networking
[Connections](#) | [Prospects](#)

My Homes
[My Profile](#) | [Questions & Answers](#)
[Endorsements](#) | [Upload My Photo](#)
[Reporting](#)

Featured Applications For Purchase

Design Center
 Make print-ready, professional-quality marketing pieces in a matter of minutes, right from your Homes Connect dashboard. [Learn More](#)

Website
 Give your site visitors, buyers and sellers the complete story on listings in your area with IDX and VOW searches. [Learn More](#)

CMAZing
 Let CMAZing compile all of your property and neighborhood data into neat, professional reports branded with your name and company logo. [Learn More](#)

Neighborhood Envoy
 Easily find information on local school systems, city demographics, sold properties, maps, points of interest, and more. [Learn More](#)

On the following screen, click the Contact Info tab and enter the Placester lead routing email in to the Email Address field in the Online section, then click Save.

Agent Profile

Cancel

Save & Close

Save

Profile Info

Contact Info

Social Networks

Office Info

Coverage Area

Designations

Password

Contact Information

* First Name:

* Last Name:

Title:

State License #:

Phone

* Office Telephone:

Ext:

Home Telephone:

Mobile Telephone:

Fax:

Online

* Email Address:

f3b2d9a2-3235-4ea9-ad84-b9fcbe7e

Alternate Email Address:

Website URL:

Realtor.com

In order to forward your realtor.com leads to your Placester CRM, you will need to log onto www.realtor.com, go to Product Setup, and then E-mail. Here, you can enter the routing e-mail for the Realtor.com group under "Consumer Inquiry E-mail" as shown below.

Email [cancel](#)

Contact Emails

Consumer Inquiry Email* (50 characters max)

Your Contact Email

Product Emails

Featured CMA Email

Featured Community Email

Company Showcase Email

[Save](#) [Cancel](#)

Viewing your leads

Lead Capture Forms

There are various lead capture forms and calls to action across your Placester site that will gather leads' contact information. This could come from:

1. Your contact page

CONTACT


First Name
 Last Name

Email Address

Phone Number

Comments/Questions

SEND



JANE STEVENS
 Phone: 800 555 1212
[Email Me](#)

2. A lead capture form on a single property page (if Lead Capture is set to Aggressively Capture Leads)

PLEASE PROVIDE YOUR
NAME AND EMAIL

First Name
 Last Name
 Email Address
 Phone Number
 I'm interested in learning more about 25 Charles St Boston MA.

SUBMIT

3. A contact form in a sidebar of a single property page

HAVE A QUESTION?

First Name

Last Name

Email Address

Phone Number

I'm interested in learning more about
25 Charles St Boston MA.

SEND

4. A registration form to sign up on your site to save searches and favorite properties.

SIGN UP

First Name

Last Name

Email

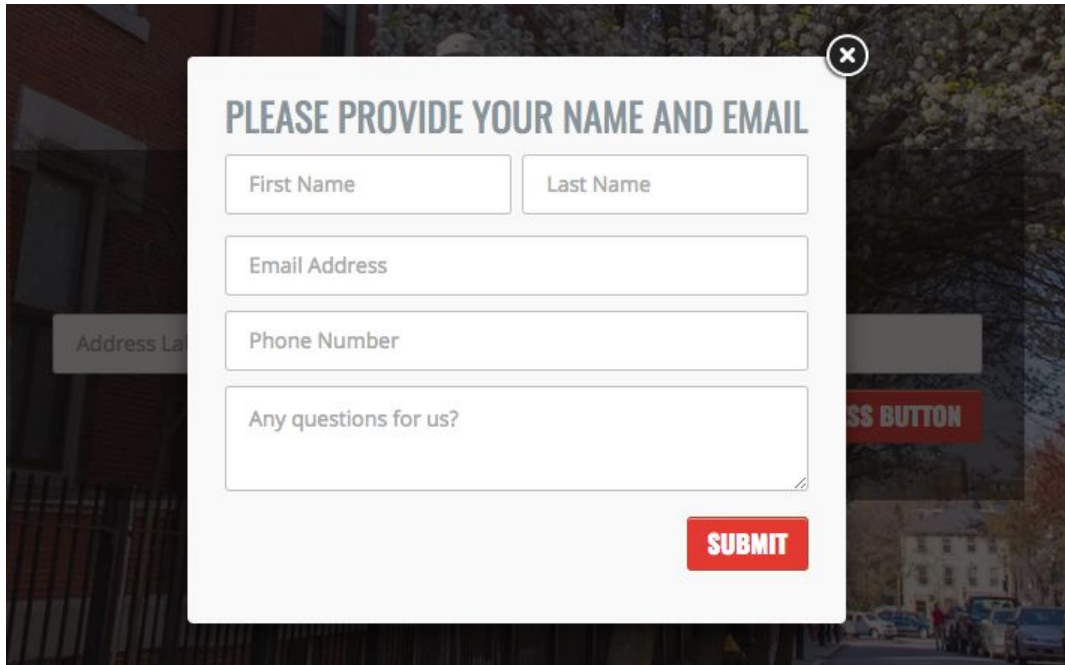
Password

Confirm Password

[Already a User?](#)

REGISTER

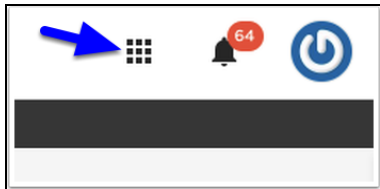
5. Through your home valuation/ landing page



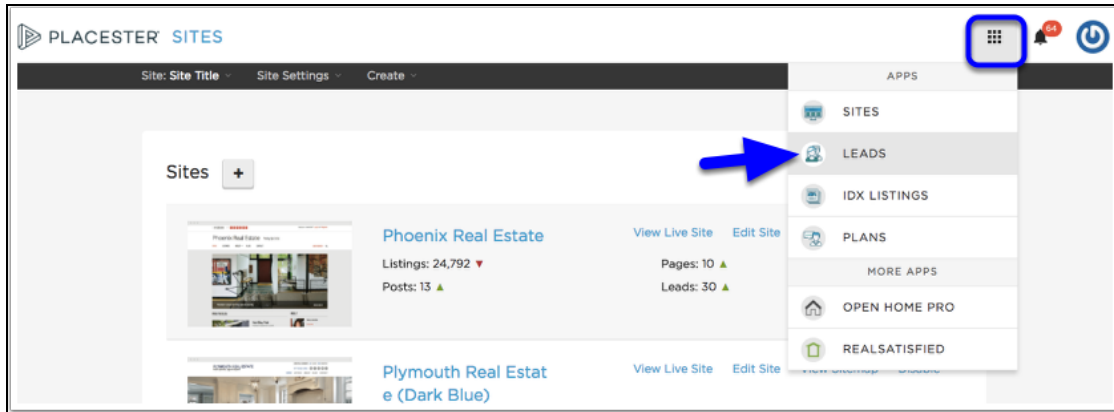
A lead is anyone who fills one of these registration or contact forms. In addition to receiving an email notification about any lead that registers on the site, you can also view a list of all of your leads through your Placester account.

Leads Tab

When you're logged into your Placester account, you'll see an Application Icon in the upper right corner of the page.



Once you click on the Application Icon, you will see the different sections of the back-end of your Placester site. Click on LEADS to view more detailed lead information.



Viewing Your Leads

This brings you to the My Leads screen, where you can see your leads' email addresses, names, statuses, creation dates, scores, types and whether or not they've been contacted.

My Leads +						
Bulk Actions ▾ Filter By: All Sources ▾ All Types ▾ All Scores ▾						
<input type="checkbox"/> Email	Name	New	Created	Score	Type	Contact
<input type="checkbox"/> jane@placester.com	Jane Stevens		12/12/14	●	Buyer	Yes
<input type="checkbox"/> doug@placester.com	Doug Gibbons		12/17/14	●	Renter	Yes
<input type="checkbox"/> eric@placestertest.com	Eric Macelroy		2/24/15	●	Seller	Yes
<input type="checkbox"/> geoff@placester.com	Geoff Bard	New	3/3/15	●	Buyer	No
<input type="checkbox"/> mariluz@placester.com	Mariluz Moreno	New	3/3/15	●	Buyer	No
<input type="checkbox"/> carl@placester.com	Carl Evans	New	3/3/15	○	Seller	No

Searching For Leads

Within the Placester Leads tab, you have the ability to search for a specific lead by First Name, Last Name, Email Address or Phone Number. To search for a lead you'll need to click the search bar at the top right of your Leads page.

My Leads +

Filters Actions More Search

You can search by first name, last name, email address and phone number.

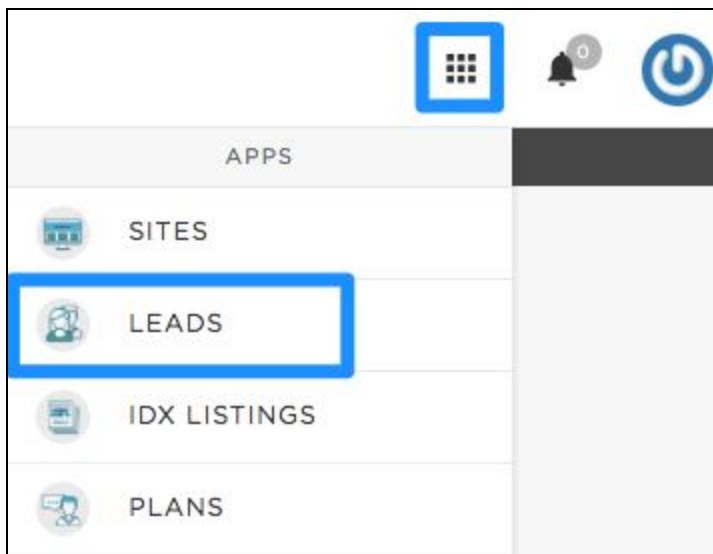
EMAIL	NAME	NEW	CREATED		
<input type="checkbox"/> Searchhere@placester.com	Example	New	11/3/16	<input type="radio"/>	None
<input type="checkbox"/> Dantest@placester.com	Dan test	New	11/3/16	<input type="radio"/>	None
<input type="checkbox"/> test@test.com	J. Guad	New	10/6/16	<input type="radio"/>	None
<input type="checkbox"/> test@placester.com	Brittany Test	New	9/28/16	<input type="radio"/>	None
<input type="checkbox"/> bring@placester.com	Brittany Test	New	9/28/16	<input type="radio"/>	None
<input type="checkbox"/> miketest@gmail.com	Mike Test	New	9/7/16	<input type="radio"/>	None
<input type="checkbox"/> placestertest@gmail.com	Test Test	New	8/18/16	<input checked="" type="radio"/>	None

Managing your leads

The Placester Lead Management System allows you to manage your Leads by providing a Lead Platform to create Lead Notes, Tasks and a platform to view your lead's specific site Activity. This support article will detail how to create and assign Tasks.

Accessing Tasks

You can access your Tasks through our Lead Management System; to access our Lead Management System you'll need to go to your the Placester Apps Menu icon in the upper right-hand corner of your dashboard > select Leads.

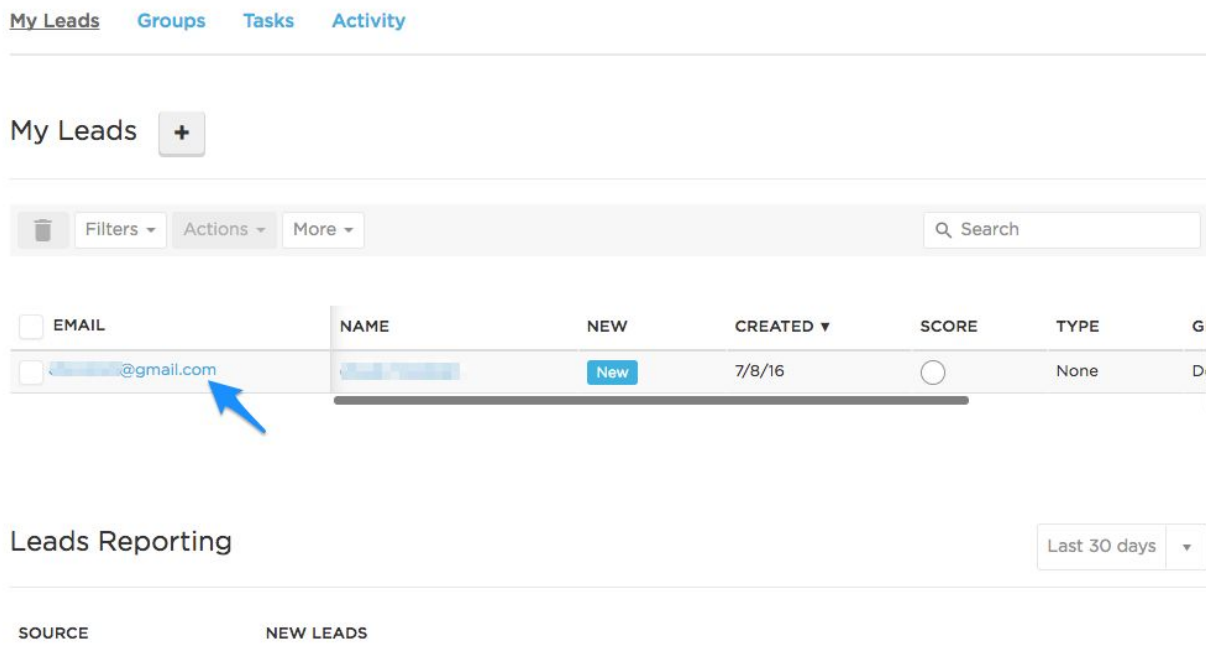


Creating and Managing Tasks

Our Lead Management System allows you to create and view Tasks within the Tasks Tab or a specific Lead Profile.

Accessing a Lead Profile

Click on the lead email address to access their profile and set tasks

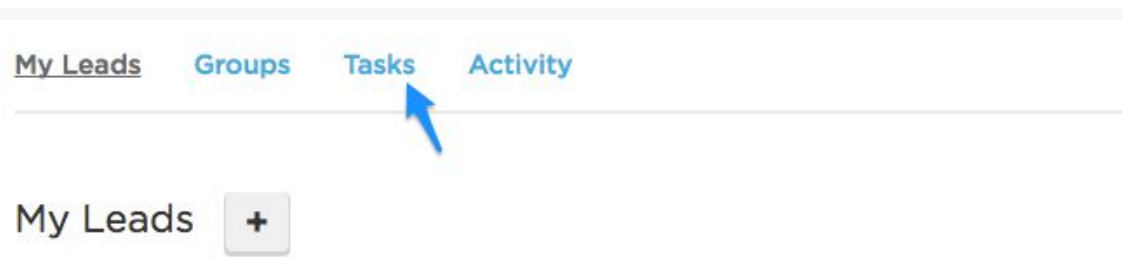


The screenshot shows the 'My Leads' section of a web application. At the top, there are tabs for 'My Leads', 'Groups', 'Tasks', and 'Activity'. Below the tabs, there is a 'My Leads' header with a '+' button. A toolbar contains a trash icon, 'Filters', 'Actions', 'More', and a search bar. A table of leads is displayed with columns: EMAIL, NAME, NEW, CREATED, SCORE, TYPE, and a partially visible 'GI' column. The first row of the table has an email address '@gmail.com' highlighted with a blue arrow. The 'NEW' column for this row contains a 'New' button. The 'CREATED' column shows the date '7/8/16'. The 'SCORE' column has a circular progress indicator. The 'TYPE' column shows 'None'. Below the table, there is a 'Leads Reporting' section with a dropdown menu set to 'Last 30 days'. At the bottom, there is a table with columns 'SOURCE' and 'NEW LEADS'.

EMAIL	NAME	NEW	CREATED	SCORE	TYPE	GI
@gmail.com		New	7/8/16		None	Dr

Accessing your Tasks Tab

You can also click on the tasks button to manage as well.



The screenshot shows the top navigation bar of the web application. It contains tabs for 'My Leads', 'Groups', 'Tasks', and 'Activity'. The 'Tasks' tab is highlighted with a blue arrow. Below the tabs, there is a 'My Leads' header with a '+' button.

New Task

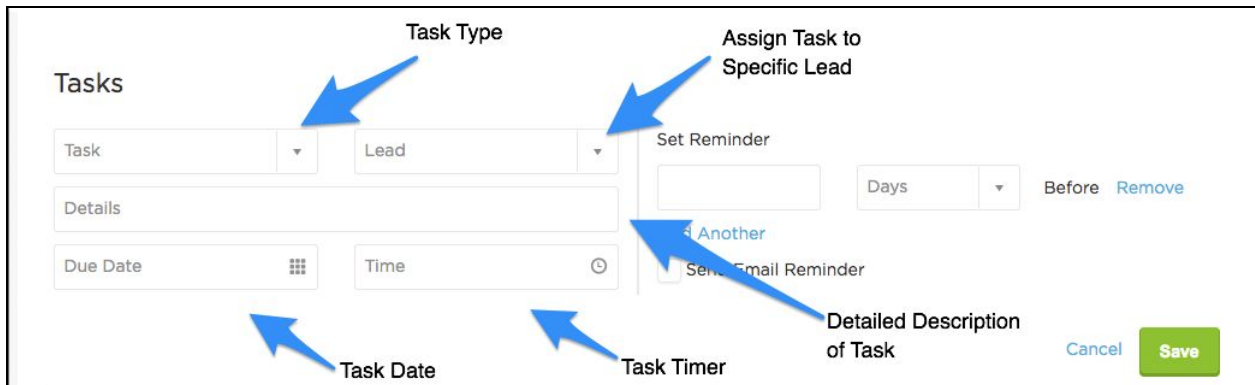
To create a New Task, you'll need to click the Plus (+) button at the top of your Task Management Page.

[My Leads](#) [Groups](#) [Tasks](#) [Activity](#)

Tasks 

Filters ▾

From here you'll be able to choose the type of task you'd like to create, assign the task to a specific lead, write details about the task and assign a date and time to that task. Please refer to screenshot below.



The screenshot shows the 'Tasks' creation form with several annotations:

- Task Type:** Points to the 'Task' dropdown menu.
- Assign Task to Specific Lead:** Points to the 'Lead' dropdown menu.
- Task Date:** Points to the 'Due Date' field.
- Task Timer:** Points to the 'Time' field.
- Detailed Description of Task:** Points to the 'Details' text area.
- Set Reminder:** Points to the 'Set Reminder' section, which includes a text input, a 'Days' dropdown, and a 'Before' label.
- Another:** Points to the '+ Another' link.
- Send Email Reminder:** Points to the 'Send Email Reminder' checkbox.
- Remove:** Points to the 'Remove' link.
- Cancel:** Points to the 'Cancel' button.
- Save:** Points to the green 'Save' button.

Within the Task Creation page, you also have the ability to set a Task Reminder. Within a specific task reminder, you'll be able to set when you receive the task reminder notification in increments of Minutes, Hours, Days and Weeks.

My Leads Groups Tasks **1** Activity

Tasks

Task Lead

Details

Due Date Time

Set Time for Reminder Notification

Set Reminder

10| Minutes Before [Remove](#)

[Add Another](#)

☐ Send Email Reminder

[Cancel](#) [Save](#)

Filters

My Leads Groups Tasks **1** Activity

Tasks

Task Lead

Details

Due Date Time

Set Reminder

Minutes Hours Days Weeks

[Add Another](#)

☐ Send Email Reminder

[Cancel](#) [Save](#)

Filters

Your Task Reminder notification will automatically display on the bell at the top right of your Placester Backend.

PLACESTER **2**

NOTIFICATIONS

Task due: Call 12/25/16

Call Lead

[Mark as Complete](#) | [View Tasks](#)

| [Dismiss](#)



You can also decide to receive an Email Task Reminder Notification by clicking the box next to "Send Email Reminder". The Email Reminder will be sent to the email address you have within your sites lead forwarding. [Click Here](#) to learn more about setting up your Lead Forwarding.

Editing An Existing Task

You can edit an existing task by clicking the section of the task you're trying to edit.

Autoresponders

To access Autoresponders, you'll need to go to the Applications menu and click on Plans within your Placester account, then click Autoresponders.

Website powered by  

PLANS


Enhance your IDX website lead generation today! Click here to get the guide!

Autoresponders Drip Campaigns Templates

Autoresponders +

PLAN NAME	CATEGORY		
PDP Contact Form	Lead Nurturing	OFF	Edit Copy Delete
Lead Capture Form	Lead Nurturing	OFF	Edit Copy Delete
Favorite Listing Registration Form	Lead Nurturing	OFF	Edit Copy Delete
Showing Request Form	Lead Nurturing	OFF	Edit Copy Delete
Contact Form	Lead Nurturing	OFF	Edit Copy Delete
Saved Search Registration Form	Lead Nurturing	OFF	Edit Copy Delete
Autoresponder: Home Valuation Form	Lead Nurturing	OFF	Edit Copy Delete

APPS

- SITES
- LEADS
- IDX LISTINGS
- PLANS 
- MORE APPS
- OPEN HOME PRO
- REALSATISFIED

Autoresponders

Placester provides you with 7 default Autoresponders, which are all initially set to *OFF*. The default Autoresponders can not be edited directly.

Editing an Autoresponder

Like Plans and Templates, the default Autoresponders can not be edited directly. If you want to make a change to one of the default Autoresponders, you'll need to first Copy it.

PDP Contact Form Lead Nurturing OFF  Copy | Delete

Once you've clicked Copy, you'll see a page with a blank Title field. You'll need to give the copied Autoresponder a new title and select a Category.

Autoresponder

Plan Name

Category

When a lead submits the form...

STEP 1

[Preview Template](#)

[Cancel](#) [Save](#)

Next, you'll need to select the site that your Autoresponder will work on (if you have multiple sites, you can select one, some or all sites), and which contact form type you'd like it to apply to.

Autoresponder

Plan Name

Category

When a lead submits the form...

☐ My Placester Site

STEP 1

[Preview Template](#)

Autoresponder

Plan Name

Category Lead Nurturing ▼

When a lead submits the form...

My Placester Site ▼


STEP 1

Send an Email ▼

Select a template ▼

[Preview Template](#)

- Select Form
- Contact Form
- ✓ PDP Contact Form
- Home Valuation Form
- New User Registration Form
- Saved Search Registration Form
- Favorite Listing Registration Form
- Lead Capture Form
- Showing Request Form



The final step is to select your template (Autoresponders can currently only send an email, so the first dropdown is set to only that action). Choose one of the pre-populated Autoresponder templates or one you've created yourself, then click Save.

Autoresponder

Plan Name

Category Lead Nurturing ▼

When a lead submits the form...


My Placester Site ▼ PDP Contact Form ▼

STEP 1

Send an Email ▼ Select a template ▼

[Preview Template](#)

[Cancel](#) [Save](#)



You'll see on the Autoresponders page that your cloned Autoresponder can now be edited, copied again, or deleted.

New User Registration Form	Lead Nurturing	<input type="checkbox"/>	Edit Copy Delete
Registration form 2	Lead Nurturing	<input type="checkbox"/>	Edit Copy Delete

To turn an Autoresponder on or off, simply click on the toggle switch within the Autoresponder editor or on the list of Autoresponders.

Favorite Listing Registration Form	Lead Nurturing	<input type="checkbox"/>	Edit Copy Delete
Showing Request Form	Lead Nurturing	<input checked="" type="checkbox"/>	Edit Copy Delete

Creating a new Autoresponder

To create your own, new Autoresponder, click the + (plus) button at the top of the page.

Autoresponders +			
PLAN NAME	CATEGORY		
PDP Contact Form	Lead Nurturing	<input type="checkbox"/>	Edit Copy Delete
Lead Capture Form	Lead Nurturing	<input type="checkbox"/>	Edit Copy Delete

As with editing your Autoresponders, you just need to give the new one a title, select a Category, choose which Site(s) the Autoresponder will work on and select which Template will be sent, then click Save.

Plan Name

Category

When a lead submits the form...

STEP 1

[Preview Template](#)

[Cancel](#) [Save](#)

Autoresponder Templates

Placester also provides a number of default Autoresponder templates. These can be found within the Templates section under the Plans tab.

Templates [+](#)

Filter By: <input type="text" value="Type"/>			
TEMPLATE NAME	SUBJECT	TYPE	
Benefits of investing	Get the most out of your real estate investments	Email	Edit Copy Delete
Benefits to renting	Learn the benefits of renting	Email	Edit Copy Delete
Buyer Financing: Placester	Guide to buyer financing	Email	Edit Copy Delete
Check Out The Blog: Placester	Tips for both buyers and sellers	Email	Edit Copy Delete
Favorite Listing Registration Form	Your website registration and favorite listing details	Autoresponder Email	Edit Copy Delete
Found a rental?	Did you find the rental you wanted?	Email	Edit Copy Delete
Generic Contact Form	Thanks for visiting our site	Autoresponder Email	Edit Copy Delete
Getting Started for Buyers: Placester	Getting Started	Email	Edit Copy Delete

As with the Autoresponders themselves, the default templates will need to be cloned before you can edit them.

Creating a new Template

On the template page, click the + (plus) button to create a new Autoresponder template. Simply fill out all of the fields and click Save. You can use Dynamic Fields to automatically populate certain information (such as the site visitor's name, your email/phone, etc) so that emails feel more personalized. We cover how to use dynamic fields here.

Email Template

[Preview](#) | [Revert to saved](#) | [Copy](#) | [Delete](#)

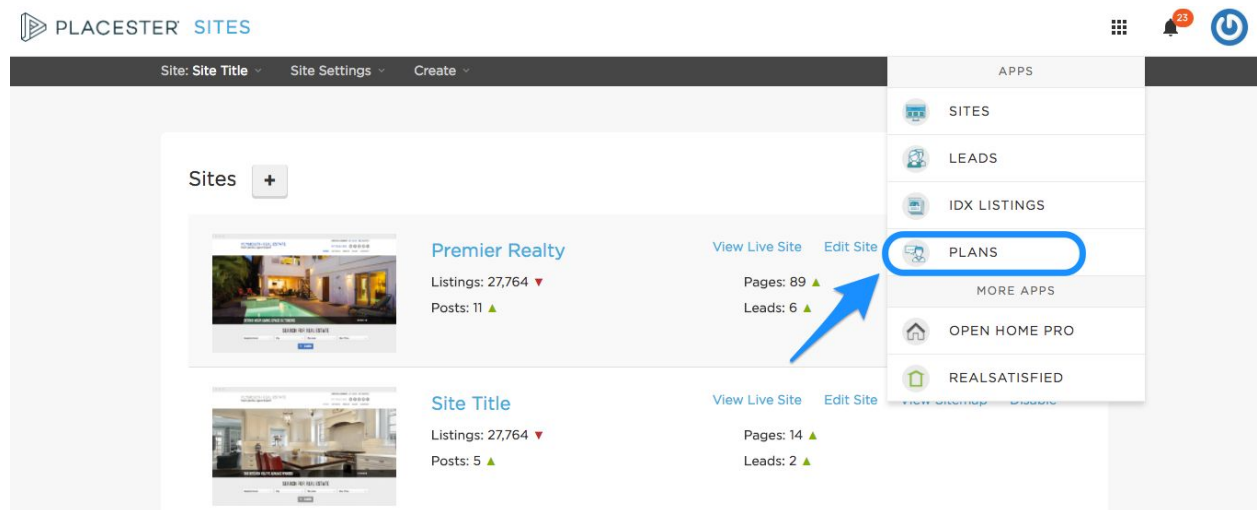
Template Name	<input type="text"/>
Email Subject	<input type="text" value="Your website registration and favorite listing details"/>
Type	<div>Autoresponder Email ▼</div>
Logo	<div>Choose File</div>
	<div>Dynamic Fields ▼</div>
Email Body	<div><div>B I U </div><div>Hi %lead_first_name%, Thanks for registering on our site and selecting a favorite listing. I'll follow up with you shortly to discuss this property in more detail. If you have any questions, please don't hesitate to contact me at %agent_email% or by phone at %agent_phone%.</div></div>

Plans

Plans are the Placester version of drip email marketing. A Plan is a series of automated emails that you can send to your leads to nurture them into becoming clients. Placester has provided pre-configured Plans for user convenience. Alternatively, you can edit the ones we've provided to better fit your needs.

Plans Tab

First, go to your Plans tab, then click Drip Campaigns.




Editing an existing Plan

You'll see that the three Plans we provide only allow to Copy, not Edit or Delete. If you want to edit one of those plans, first you'll need to click Copy on the relevant plan.

Drip Campaigns +

PLAN NAME	CATEGORY	
Buyer	Lead Nurturing	Edit Copy Delete
Branding	Lead Nurturing	Edit Copy Delete
Seller	Lead Nurturing	Edit Copy Delete
Repeat Buyer/Investor	Lead Nurturing	Edit Copy Delete
Renter	Lead Nurturing	Edit Copy Delete
Jess's Drip Campaign	Lead Nurturing	Edit Copy Delete
Premium Plan test	Lead Nurturing	Edit Copy Delete

This will open the Plan. On this page, you'll be able to edit the Plan any way you see fit. You can rename the Plan Name, edit the Category, add or remove Steps and change the scheduling and which email templates get sent out when.

 PLACESTER PLANS We

Rename Plan

Plan Name

Category

STEP 1

When lead is added to the Plan

[Preview Template](#)

STEP 2

Modify scheduling **Remove Step**

2 Days later [Edit](#) [Preview Template](#)

STEP 3

Change template

2 Days later [Edit](#) [Preview Template](#)

STEP 4

Once you've finished editing the Plan, click Save. You'll see your new Plan in the list. You'll see the edited Plan in your list. Now, you'll be able to edit this Plan whenever you want. You can also edit a new Plan that you created any time you like. For a new or previously edited Plan, simply click Edit.

[Autoresponders](#) [Drip Campaigns](#) [Templates](#)

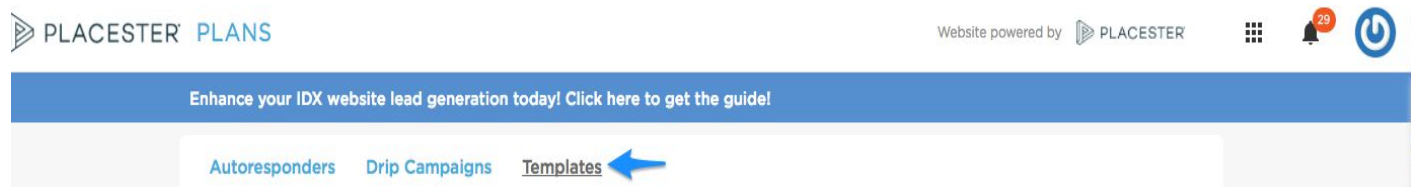
Drip Campaigns +

PLAN NAME	CATEGORY	
Buyer	Lead Nurturing	Edit Copy Delete
Branding	Lead Nurturing	Edit Copy Delete
Seller	Lead Nurturing	Edit Copy Delete
Repeat Buyer/Investor	Lead Nurturing	Edit Copy Delete
Renter	Lead Nurturing	Edit Copy Delete
Jess's Drip Campaign	Lead Nurturing	Edit Copy Delete
Premium Plan test	Lead Nurturing	Edit Copy Delete
Finding a home	Lead Nurturing	Edit Copy Delete

Email templates are the different steps that make up a Plan. Placester has provided pre-configured Plans and email templates, which you can edit to suit your own needs.

Plans > Templates

First, go to the Plans settings, then click Templates. You can filter the type of Template you want to edit to show the only the Drip Campaign templates or Autoresponders templates.



The pre-loaded Templates provided by Placester can't be edited directly. You'll need to click Copy on the Plan Template you want to edit.

+

Copy

Editing the Template

You'll be brought to a page where you can edit the email template:

Email Template

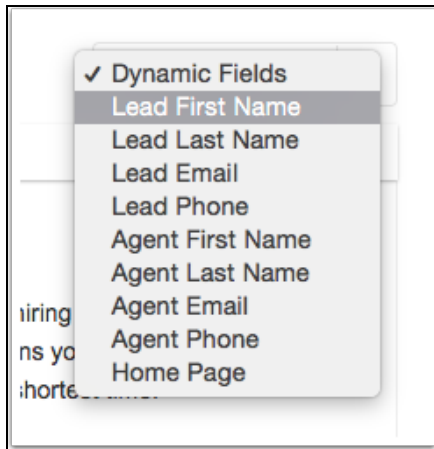
[Preview](#) | [Revert to saved](#) | [Copy](#) | [Delete](#)

1. **Template Name:** What you'll see internally as the template name for adding the template to a Plan.
2. **Email Subject:** What the lead will see as the subject when receiving the email.
3. **Logo:** Your company or personal logo to add your branding to the email.

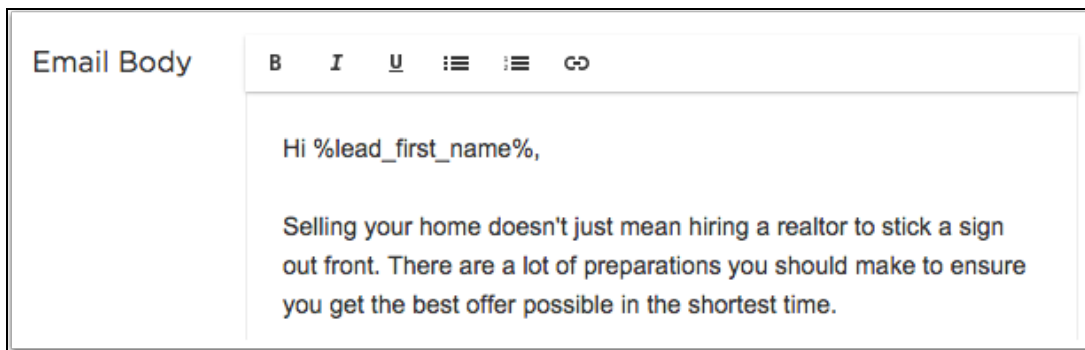
4. Email Body: The text to be included within the email.

Pro Tip: Using Dynamic Fields

Within the template creator/editor, there's an option to use dynamic fields. These are quick links that allow you to customize your emails to leads.



For instance, you can use Lead First Name to create a greeting that will automatically be filled in based on the lead that the Plan is assigned to.



The lead's first name will be filled in automatically in this spot.

Drip campaigns

First, go to your Plans tab, then choose Autoresponders or Drip Campaigns.

Enhance your IDX website lead generation today! Click here to get the guide!

[Autoresponders](#) [Drip Campaigns](#) [Templates](#)

Drip Campaigns +

PLAN NAME	CATEGORY	
Buyer	Lead Nurturing	Edit Copy Delete
Branding	Lead Nurturing	Edit Copy Delete
Seller	Lead Nurturing	Edit Copy Delete
Repeat Buyer/Investor	Lead Nurturing	Edit Copy Delete
Renter	Lead Nurturing	Edit Copy Delete

APPS

- SITES
- LEADS
- IDX LISTINGS
- PLANS
- MORE APPS
- OPEN HOME PRO
- REALSATISFIED

To put a lead on a Plan, visit their lead profile and click the

Adding a New Drip Campaign

Click the + button to create a new Drip Campaign.

Drip Campaigns +

PLAN NAME	CATEGORY	
Buyer	Lead Nurturing	Edit Copy Delete
Branding	Lead Nurturing	Edit Copy Delete

Creating Your Drip Campaign

From here, you'll be brought to a page where you can enter your unique Plan Name and choose a category for your Plan.

Drip Campaign

Plan Name

Seller

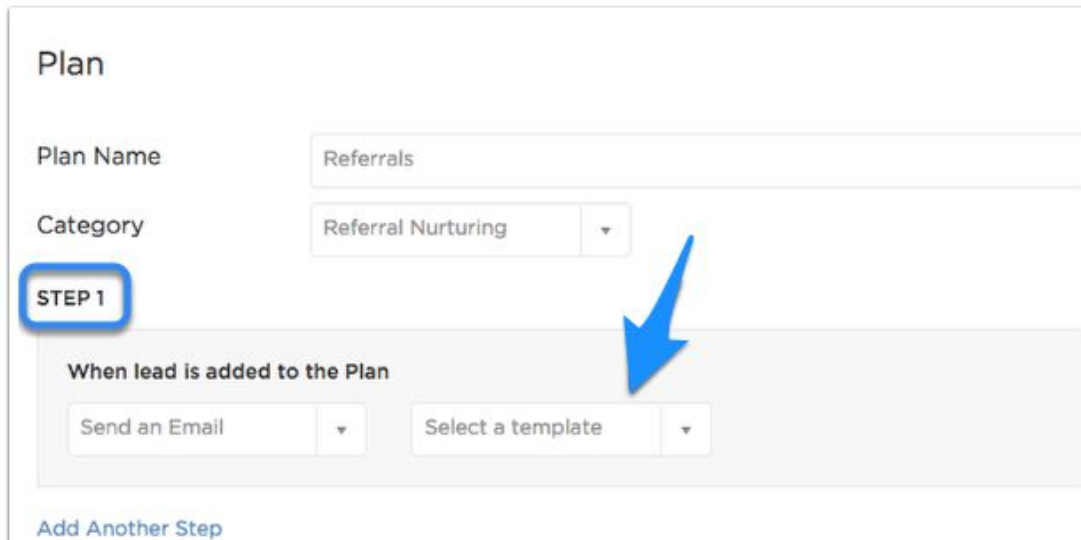
Category

- ✓ Lead Nurturing
- Referral Nurturing
- Working a Deal

STEP 1

Choosing What to Send

Under "Step 1," you can choose what to send your leads once they are added to the Plan. You can choose from a variety of email templates.



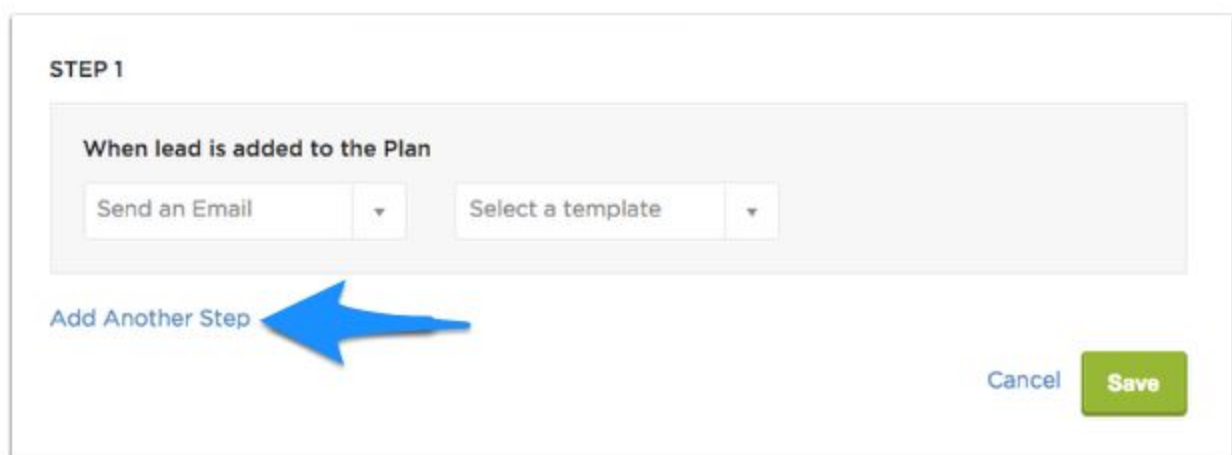
The screenshot shows a 'Plan' configuration form. At the top, 'Plan Name' is set to 'Referrals' and 'Category' is 'Referral Nurturing'. Below this, 'STEP 1' is highlighted with a blue box. Under the heading 'When lead is added to the Plan', there are two dropdown menus: 'Send an Email' and 'Select a template'. A blue arrow points to the 'Select a template' dropdown. At the bottom left, there is a link 'Add Another Step'.

Pro Tip: Create Your Own Templates

You can use our prebuilt templates here or create your own email template, which you can work on through Leads > Templates.

Adding Other Steps

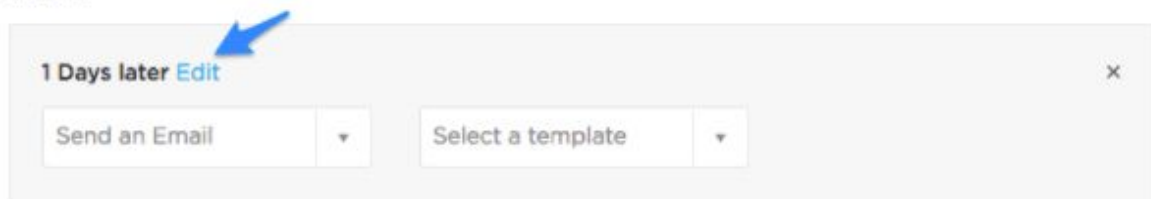
You have the option to add more steps to your Plan. Underneath Step 1, click on "Add Another Step."



This screenshot shows the 'STEP 1' configuration section. It includes the same 'When lead is added to the Plan' dropdowns as the previous image. A blue arrow points to the 'Add Another Step' link located below the configuration area. At the bottom right, there are 'Cancel' and 'Save' buttons.

From here, "Step 2" will be added, where you can choose the timeframe between activities and again select an email template. First click edit.

STEP 2

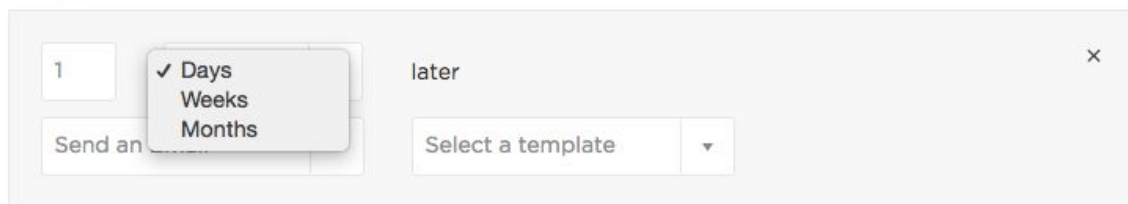


1 Days later [Edit](#)

Send an Email ▼ Select a template ▼

Choose timeframe from the list.

STEP 2

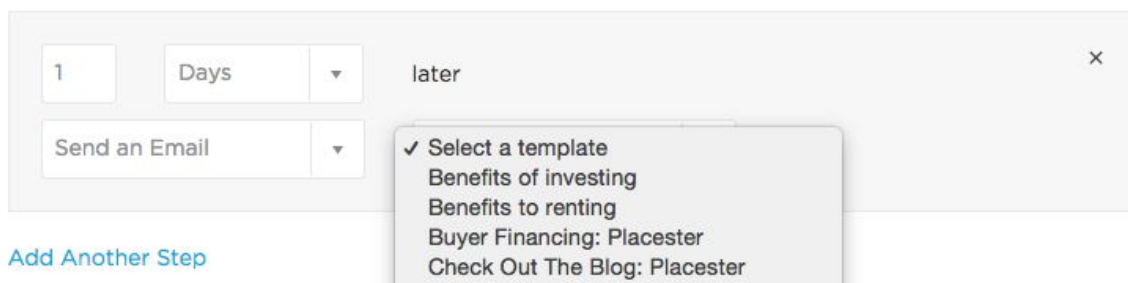


1 ☒ Days ☐ Weeks ☐ Months later

Send an Email ▼ Select a template ▼

Choose the template you would like to use

STEP 2



1 Days later

Send an Email ▼

☒ Select a template
Benefits of investing
Benefits to renting
Buyer Financing: Placester
Check Out The Blog: Placester

[Add Another Step](#)

When you're done adding the desired steps to your Plan, click Save.

Mobile CRM

Placester's Essential and Premium packages gives you access to the Placester CRM for mobile. This iPhone app allows you to manage your leads on the go. [Click here](#) to learn more about the app, and how it integrates with the web version of the CRM.

What's Next?

You are now ready to build and nurture your lead base using your Placester CRM. Keep in mind we will regularly be adding new features and improvements to the CRM

and the site. We also like to hear from our customers. If you would like to see something added to or improved within the CRM, please let us know and we would be happy to document this feedback for our team!