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 Monday - Friday or send us an email at support@placester.com.

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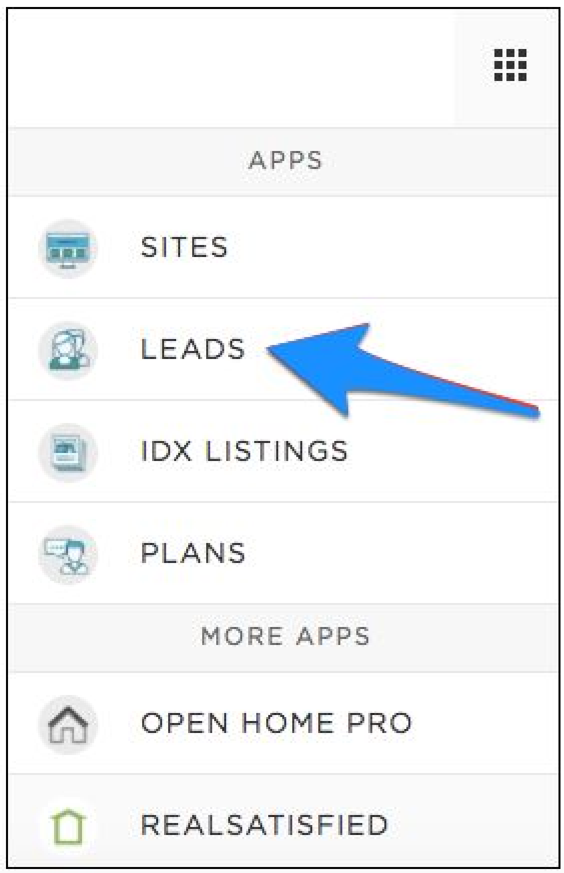
Getting Started

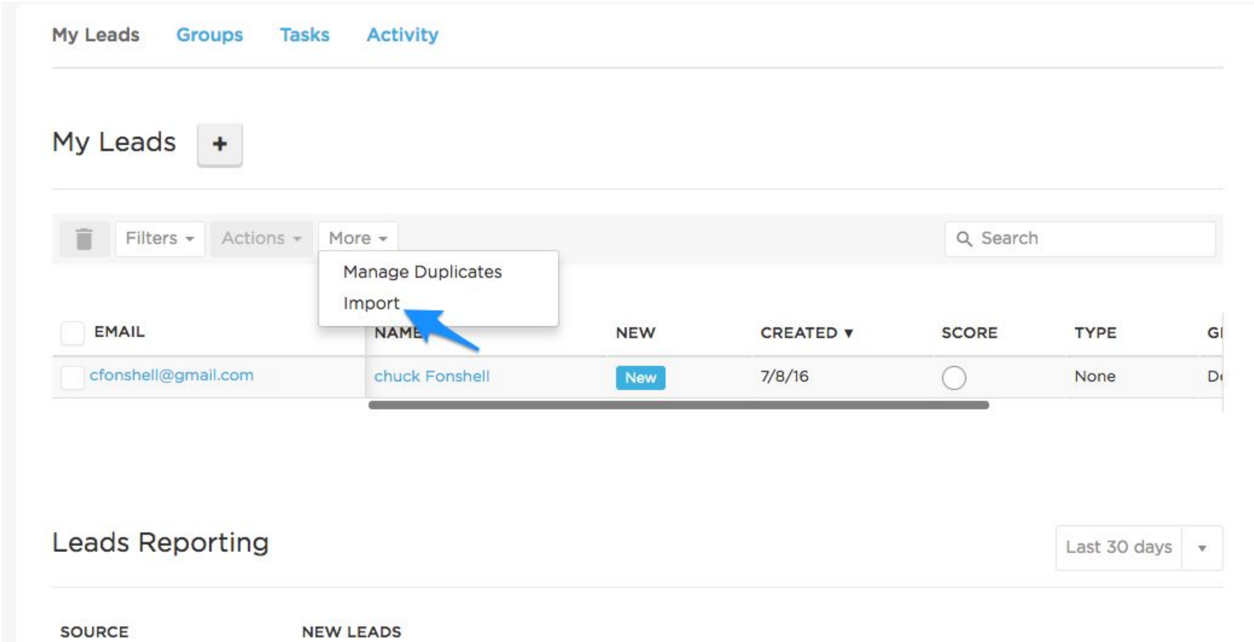
Before beginning your CRM setup, you'll want to make sure your lead capture settings are tailored to your liking. [Click here]() to watch a video about this.

Importing Leads

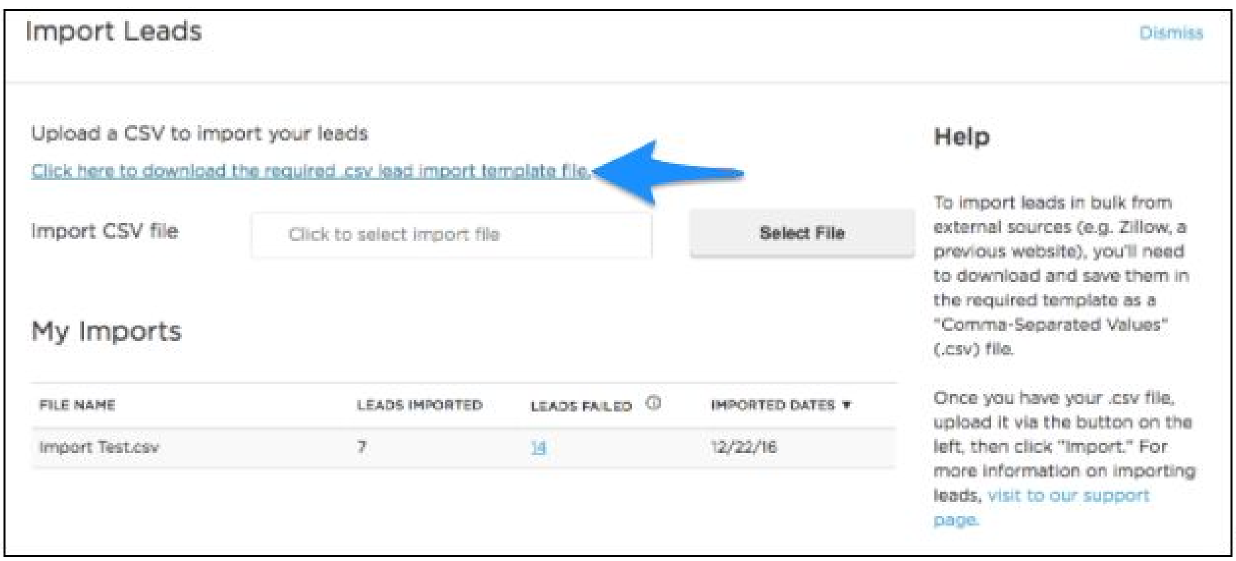
To import your leads, first log in to your Placester account. Then go to the app icon and select "leads".



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.

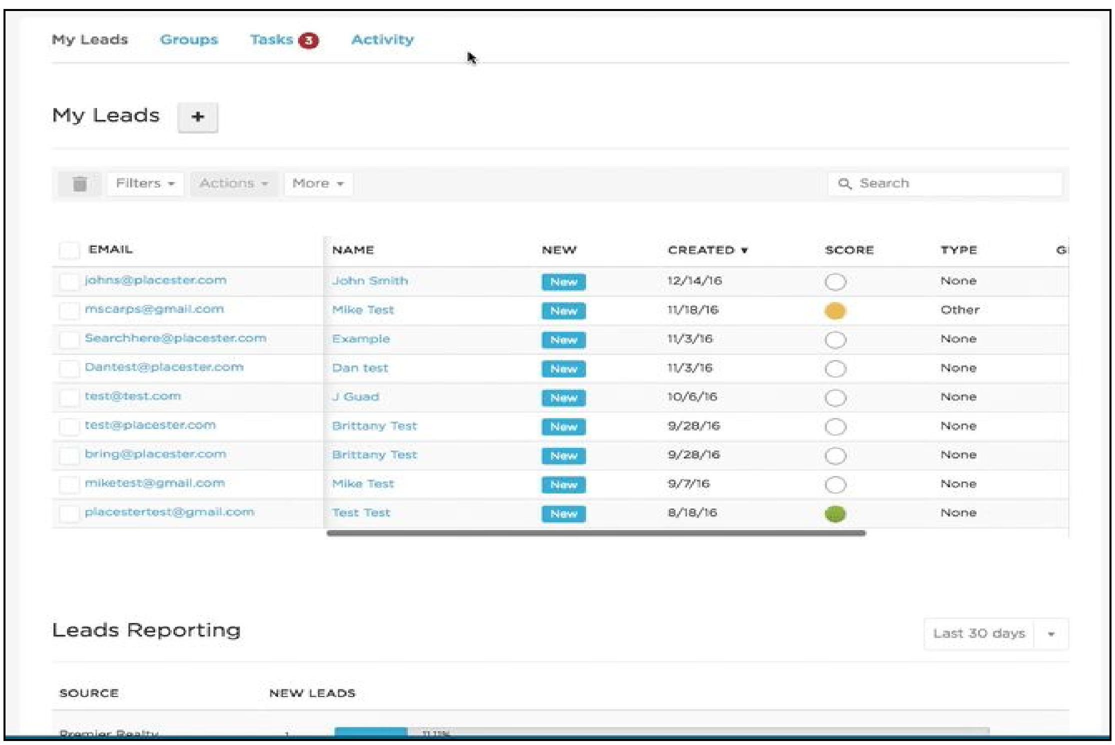


You'll be able to view a list of completed and in progress imports. Any imported leads will be marked as NEW with a source of 'import'.

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.

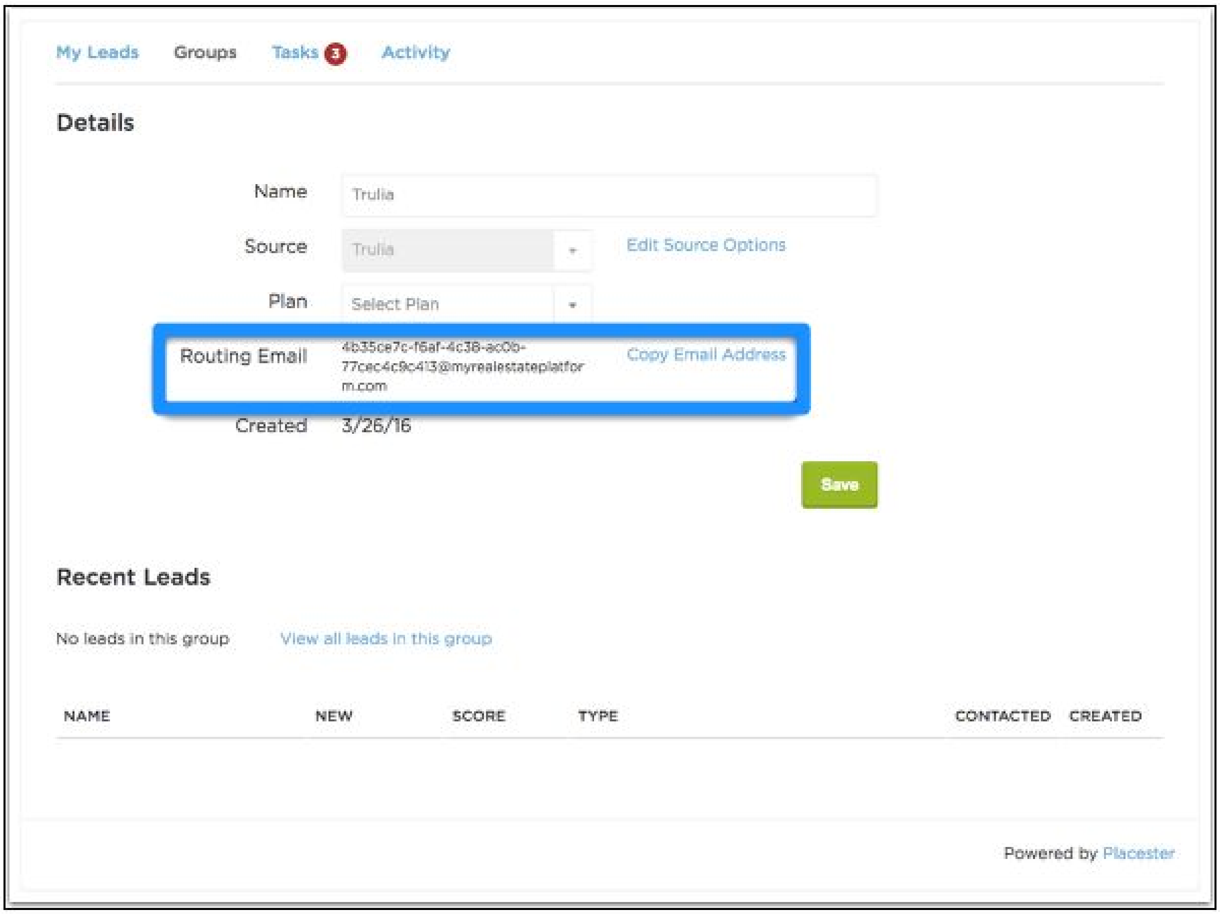
You'll also be able to manage duplicates that arise from the import.

Forwarding leads from other sites



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).

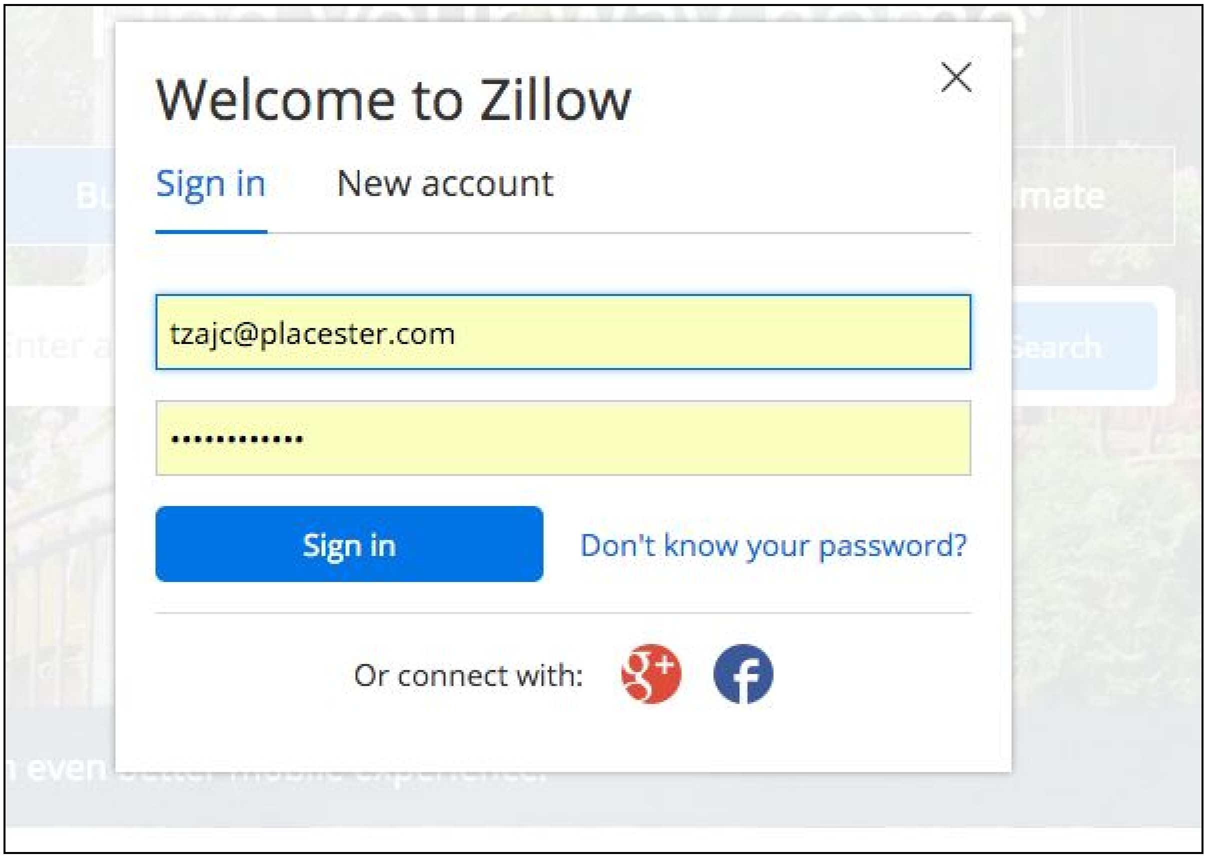


Now that you have the forwarding e-mail address, you will need to log into the respective real estate site and input the e-mail address as shown below.

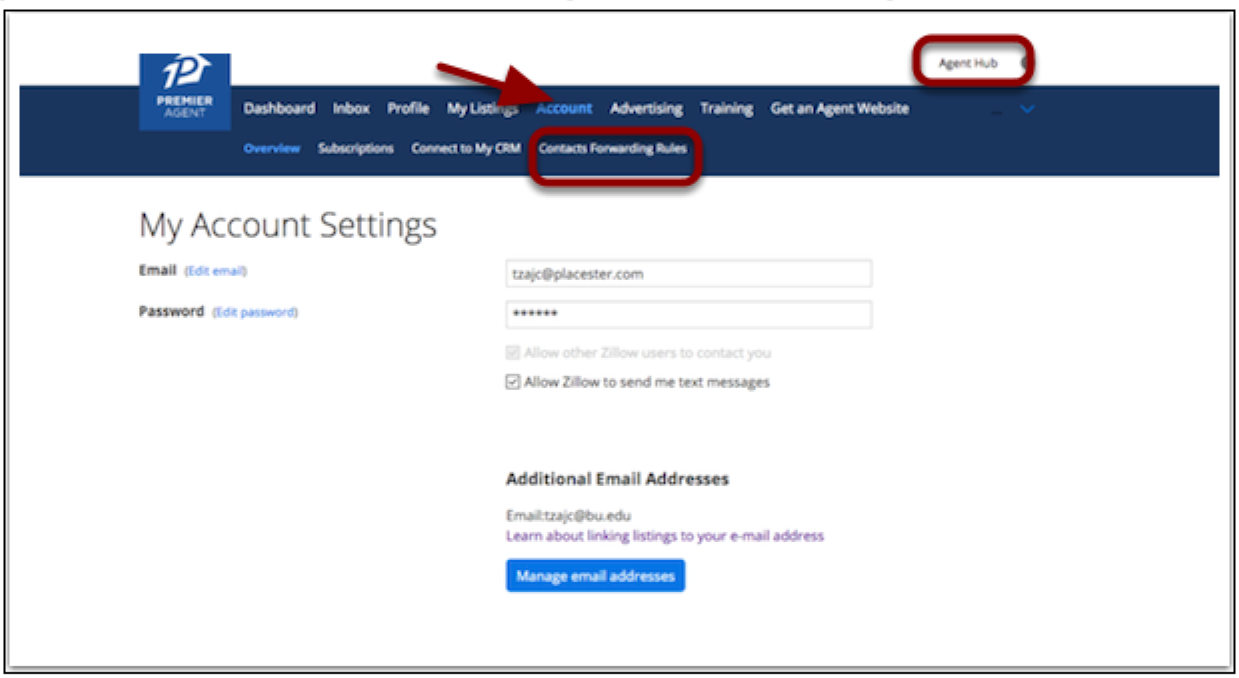
Important note: Forwarding from Zillow/Trulia is temporarily unavailable due to some adjustments being made to the upload process.

Zillow

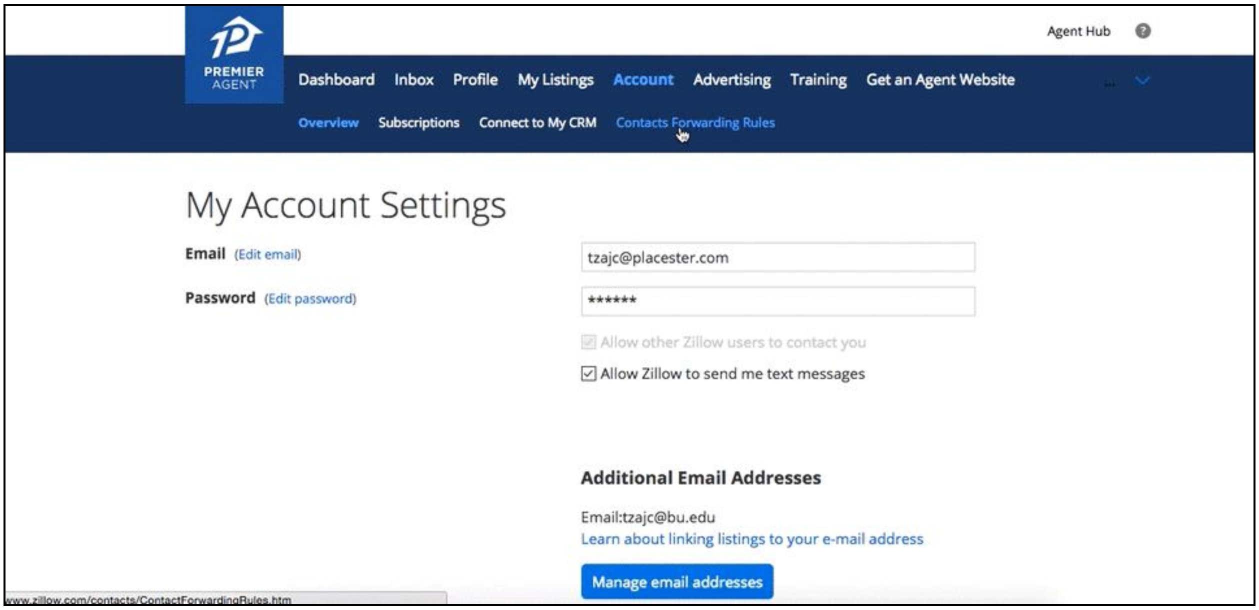
In order to forward the leads from Zillow over to your Placester CRM, you will need to sign into your Zillow Premier Agent account at zillow.com



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.

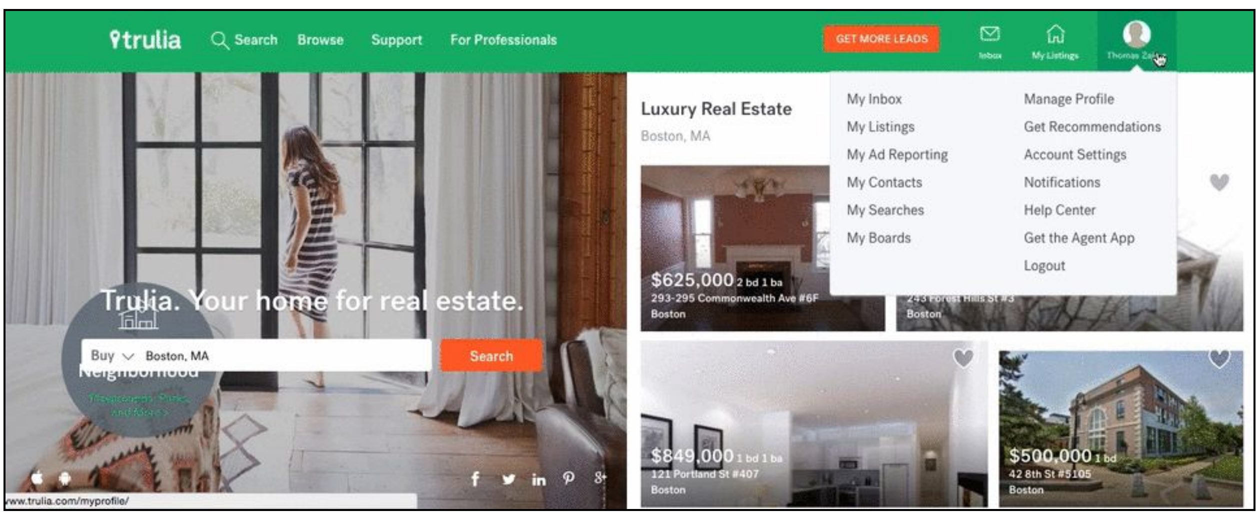


Once you click on Contact Forwarding Rules, where you can add custom rules for your account. On this screen, you will click New Rule, which will take you to the screen below. Here you will be able to choose the forwarding settings and input the Placester forwarding e-mail for the Zillow group under "Recipient's E-mail Address". After saving, all that fall within the rule you created will be sent to your Placester CRM. (see gif)

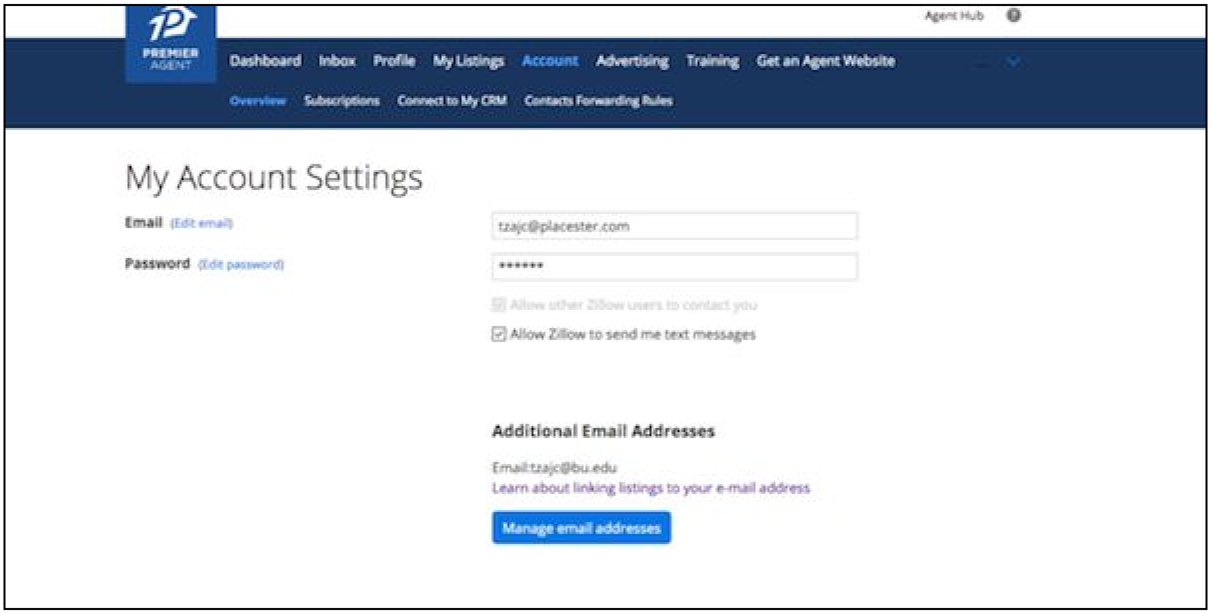


Trulia

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.

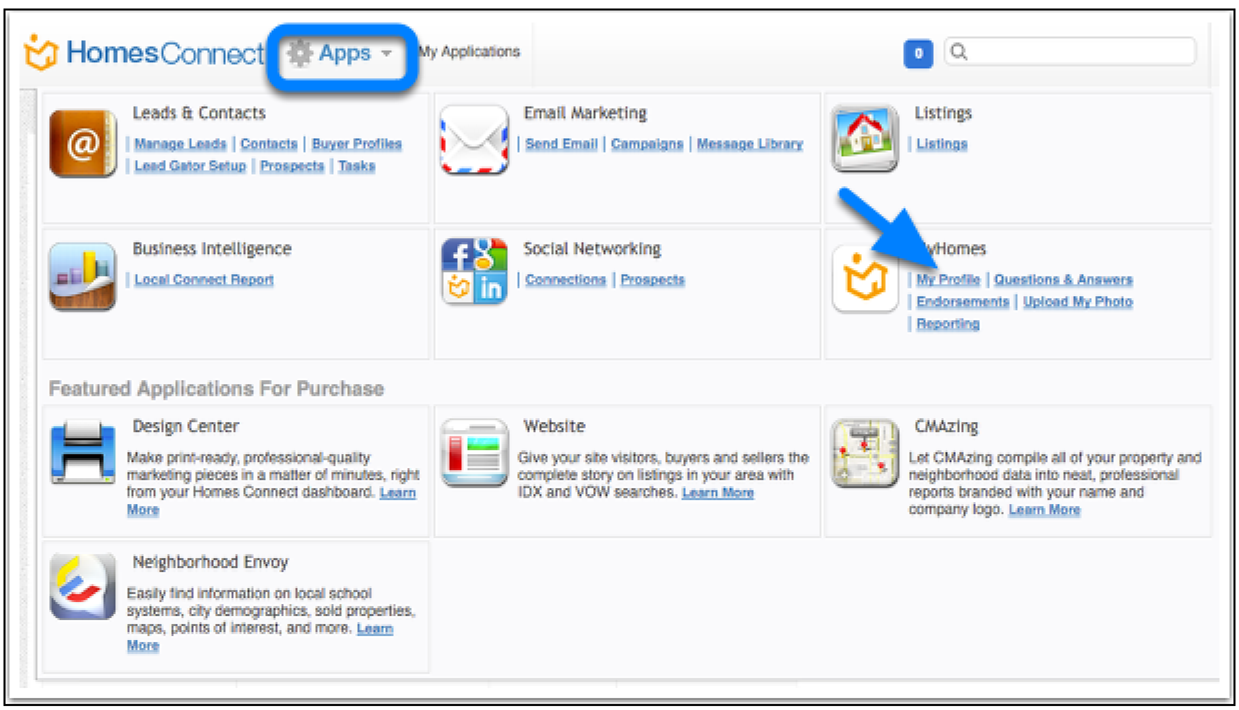


After clicking on account settings, you will be taken to the Zillow Premier Agent Account tab shown below and you can follow the instructions above from then on and input the e-mail found under the Trulia group in the lead section of the back-end.

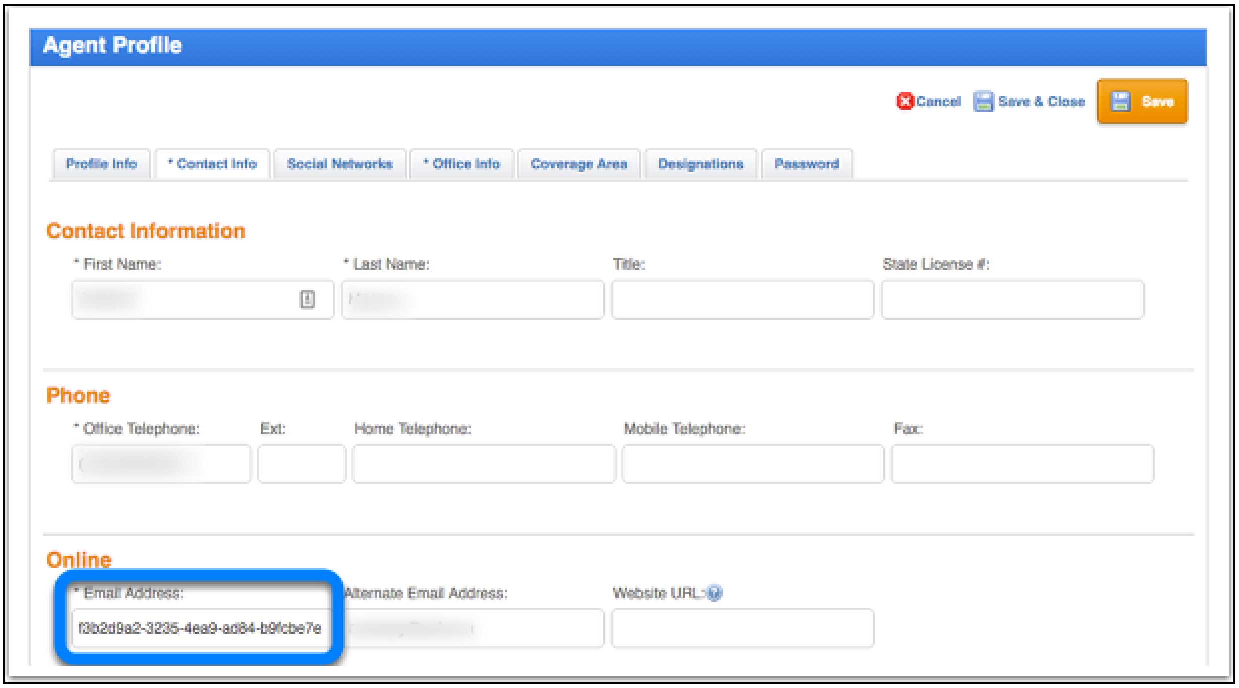


Homes.com

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.

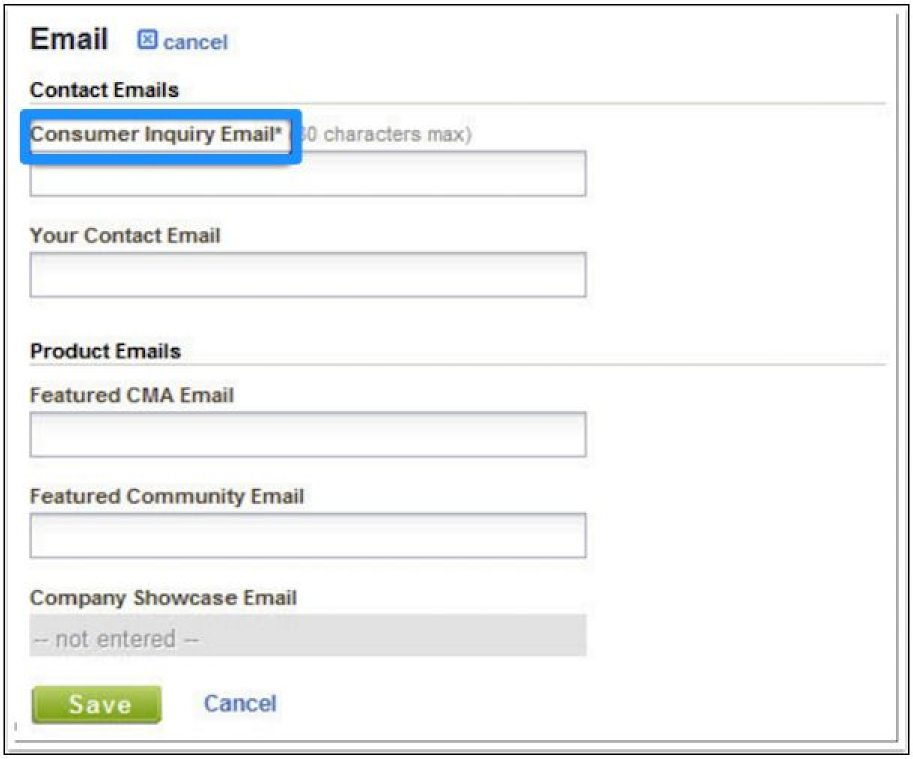


On the following screen, click the Contact Info tab and enter the Placester lead routing email in to the Email Address field in the Online section, then click Save.



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.

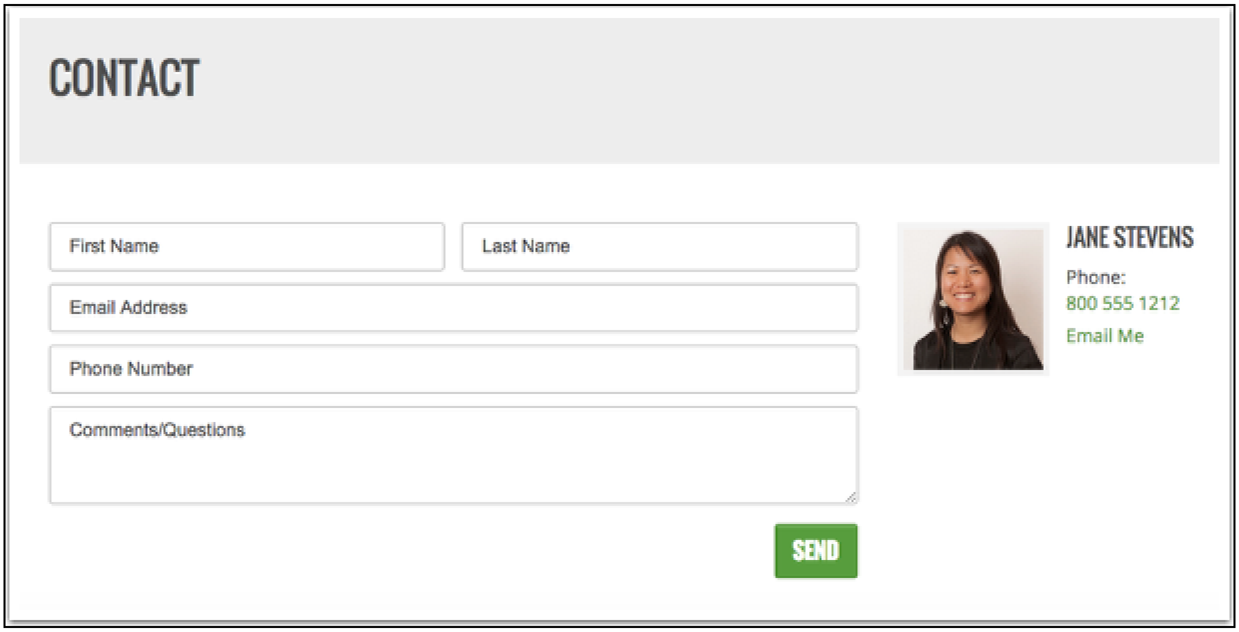


Viewing your leads

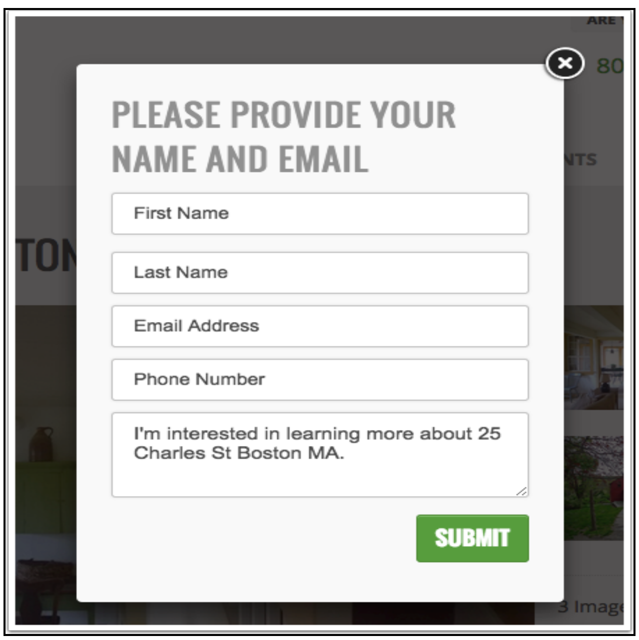
Lead Capture Forms

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

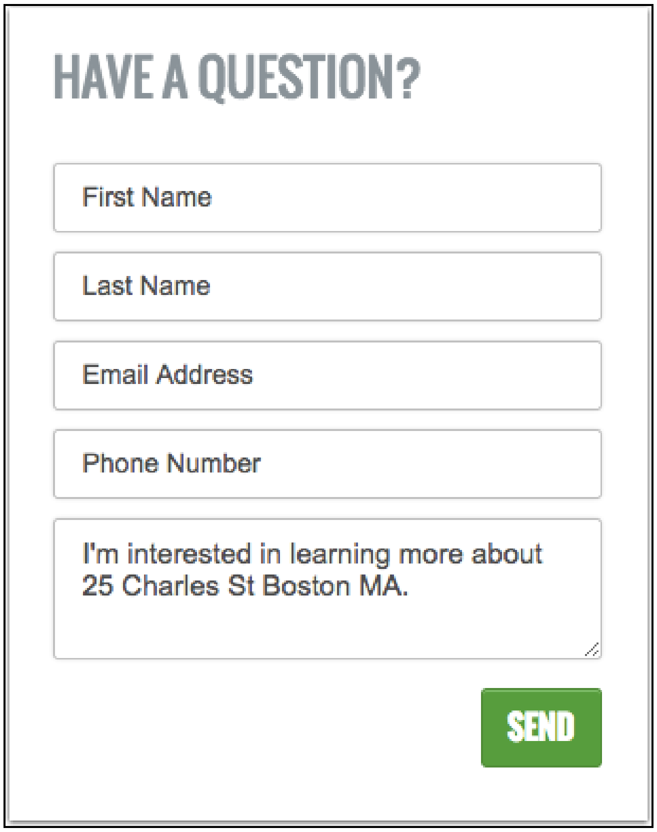
1. Your contact page



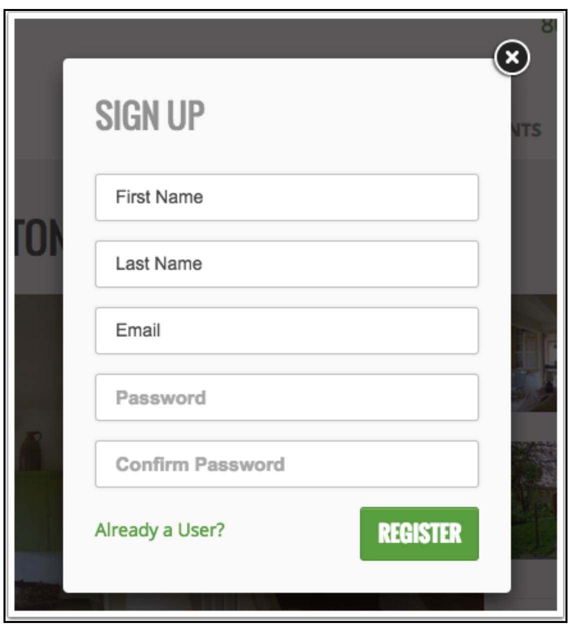
2. A lead capture form on a single property page (if Lead Capture is set to Aggressively Capture Leads)



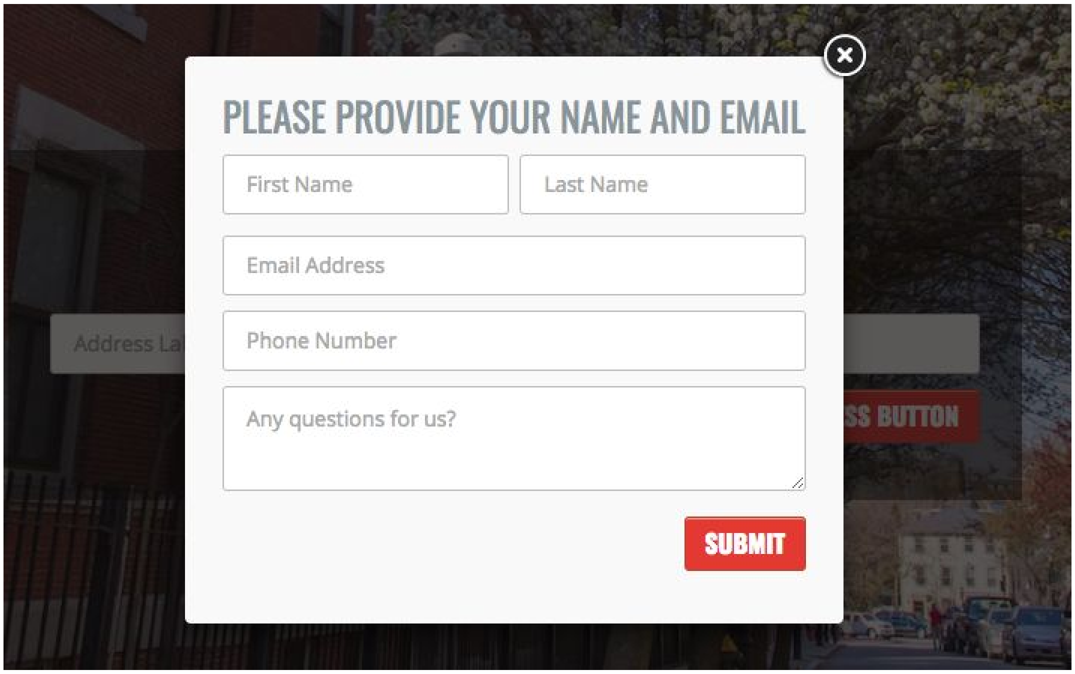
3. A contact form in a sidebar of a single property page



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



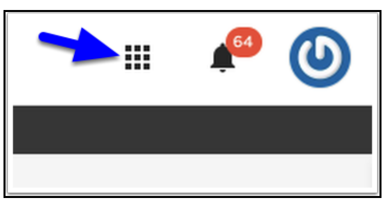
5. Through your home valuation/ landing page



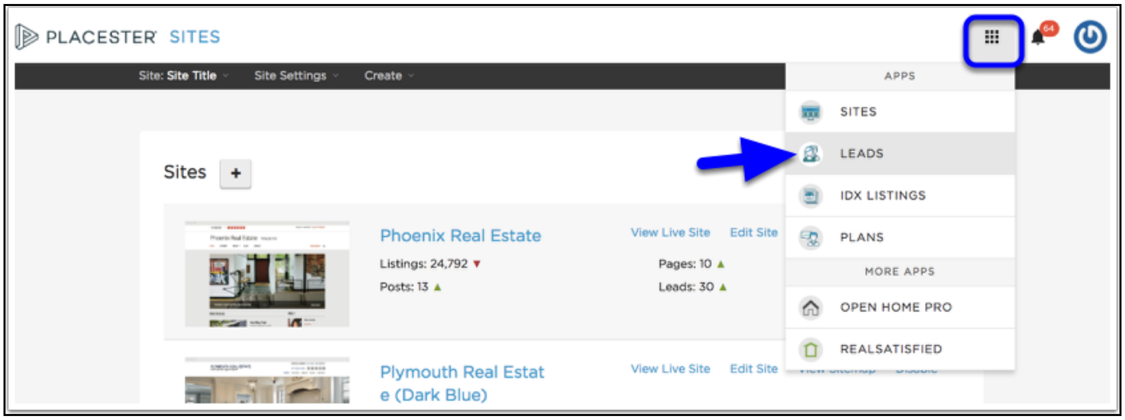
A lead is anyone who fills one of these registration or contact forms. In addition to receiving an email notification about any lead that registers on the site, you can also view a list of all of your leads through your Placester account.

Leads Tab

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

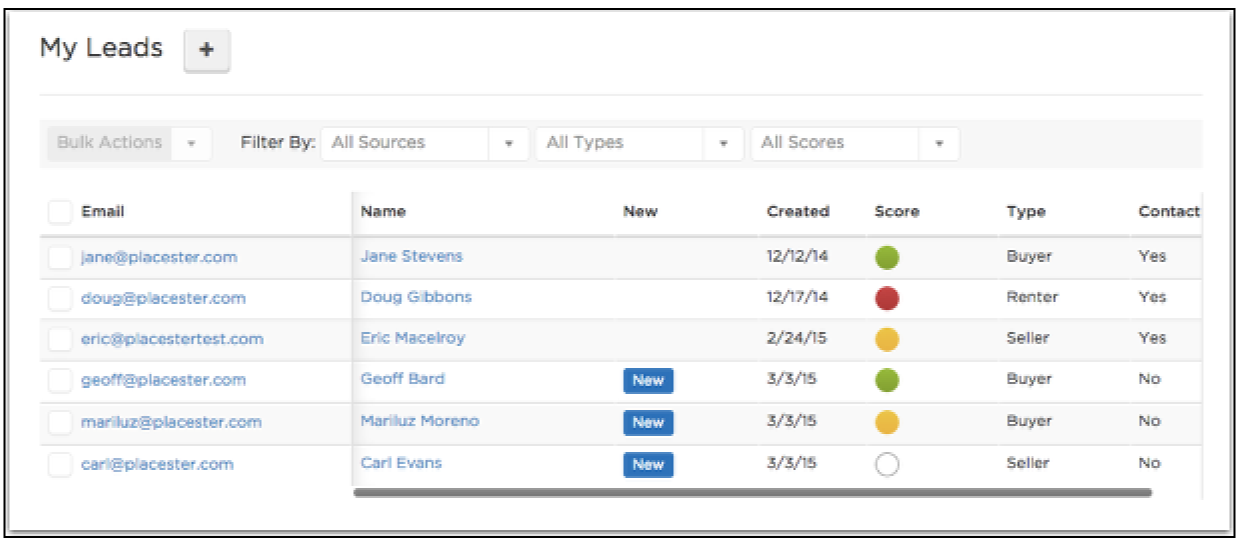


Once you click on the Application Icon, you will see the different sections of the back-end of your Placester site. Click on LEADS to view more detailed lead information.



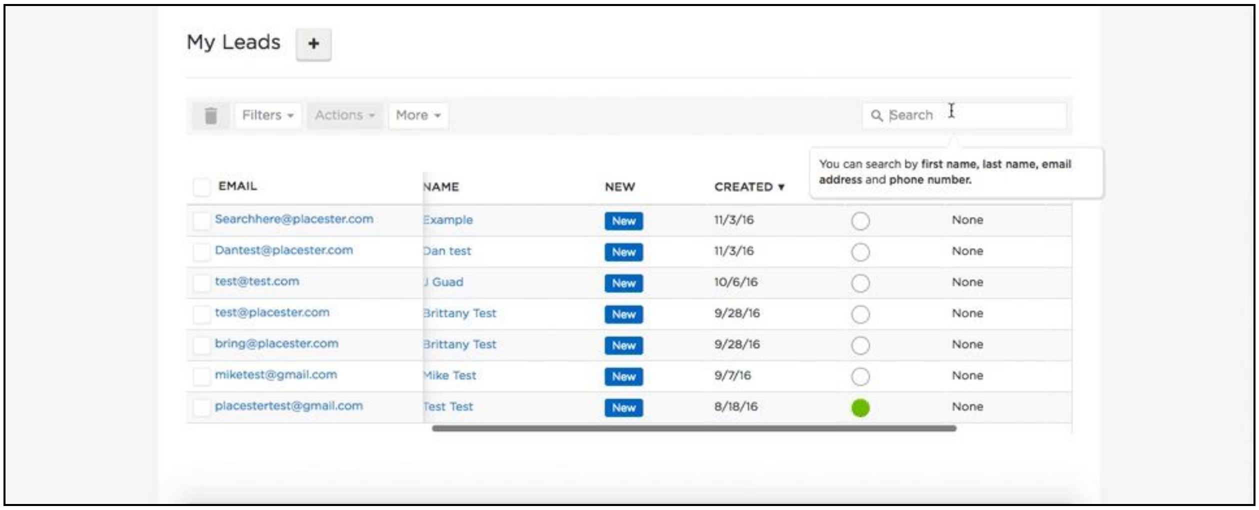
Viewing Your Leads

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.



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.

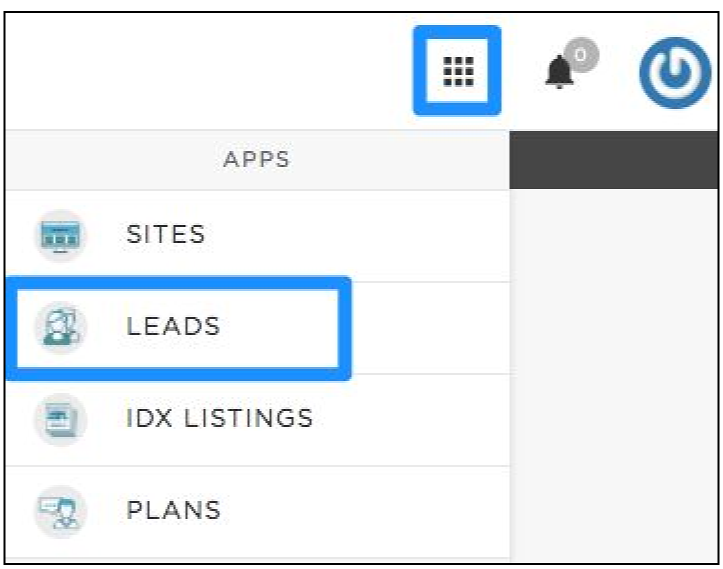


Managing your leads

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.

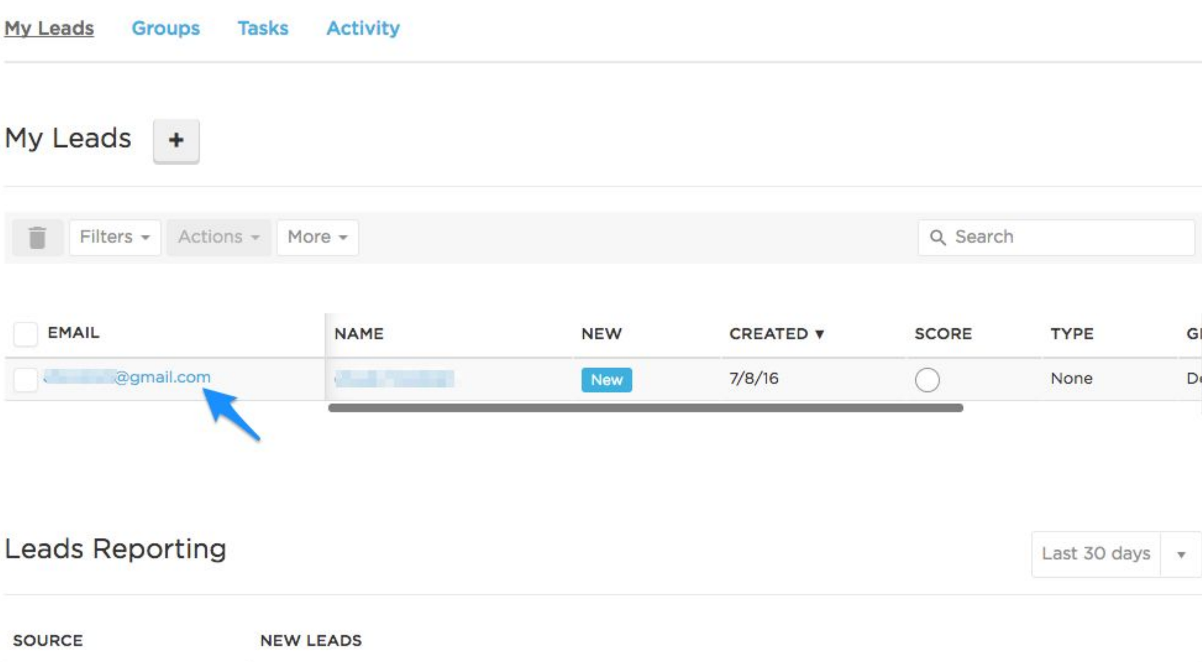


Creating and Managing Tasks

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

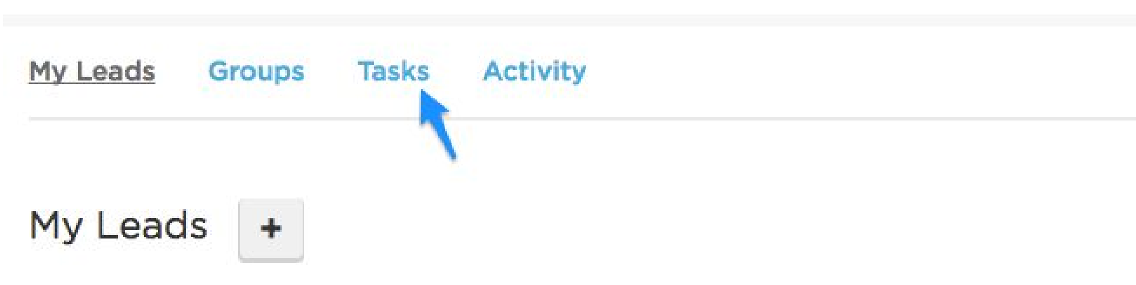
Accessing a Lead Profile

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



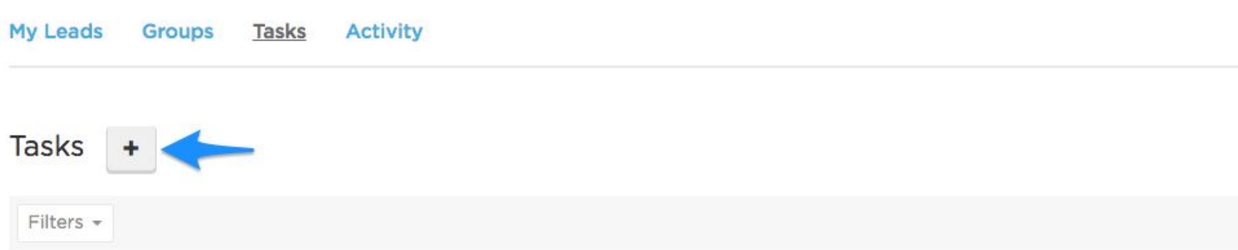
Accessing your Tasks Tab

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

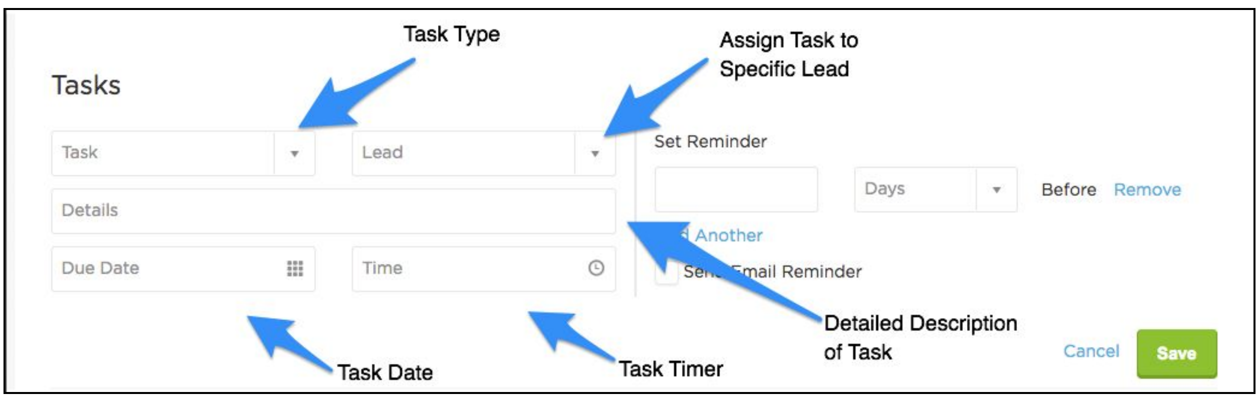


New Task

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

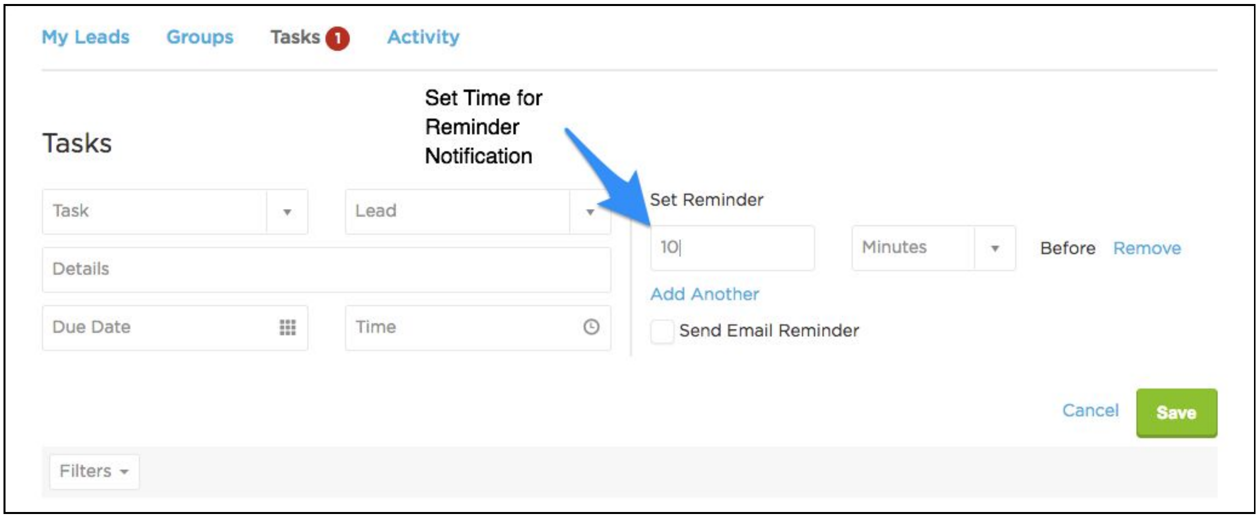


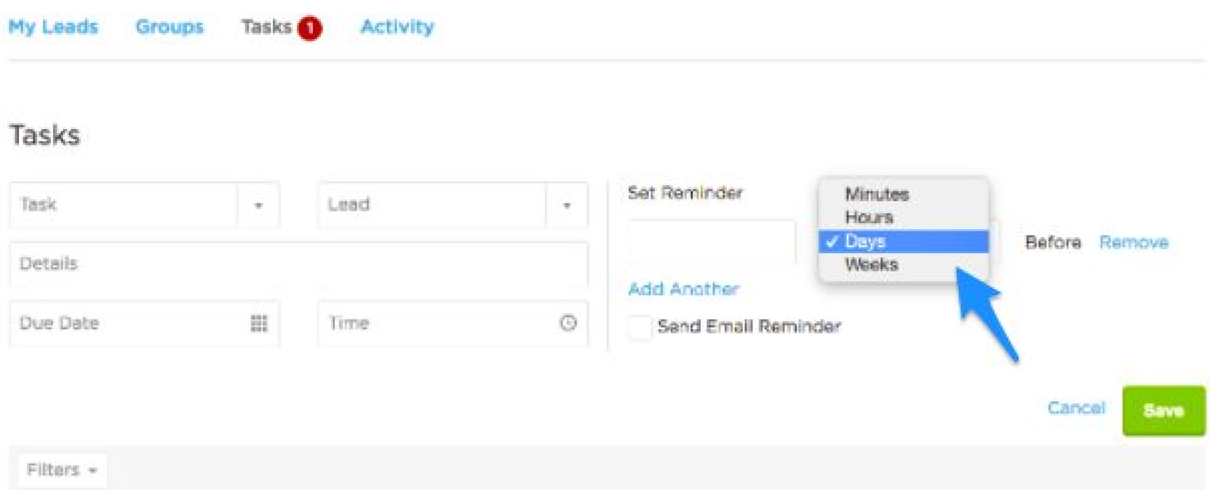
From here you'll be able to choose the type of task you'd like to create, assign the task to a specific lead, write details about the task and assign a date and time to that task. Please refer to screenshot below.



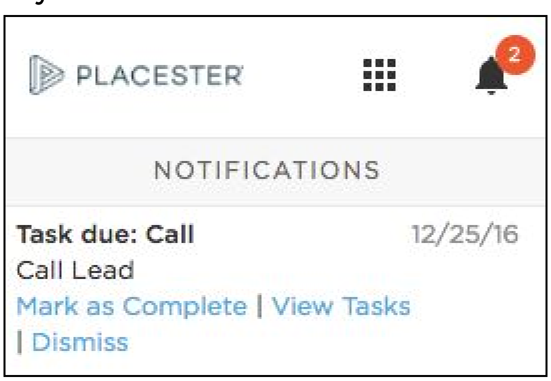
Within the Task Creation page, you also have the ability to set a Task Reminder. Within a specific task reminder, you'll be able to set when you receive the task reminder notification in increments of Minutes, Hours, Days and Weeks.

PLACESTER





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



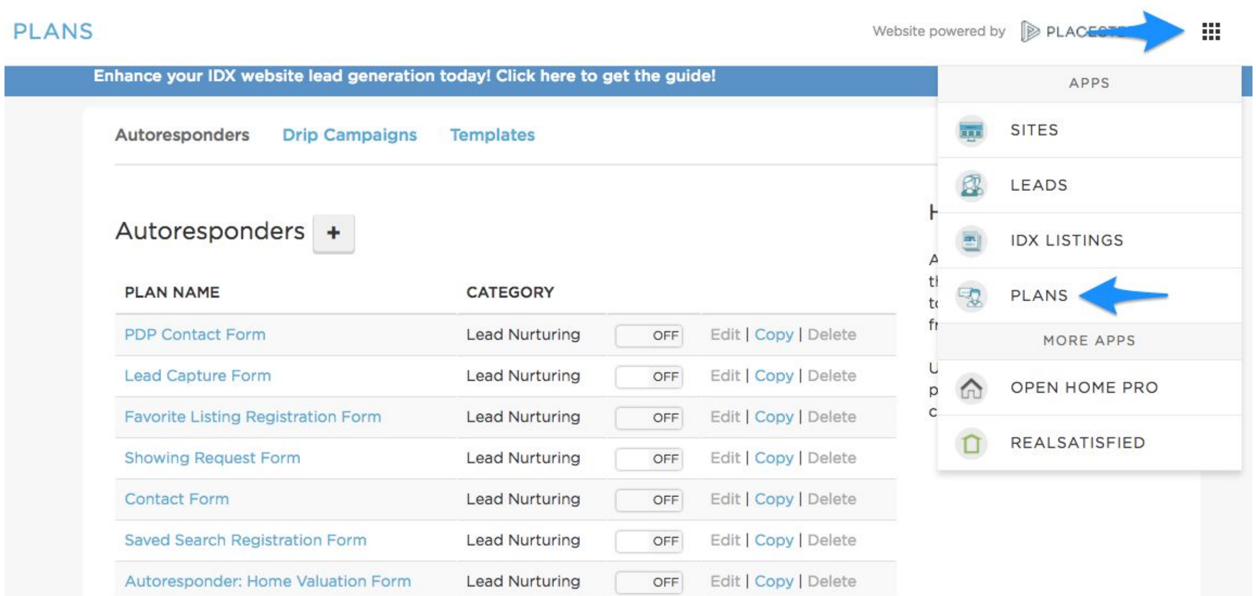
You can also decide to receive an Email Task Reminder Notification by clicking the box next to "Send Email Reminder". The Email Reminder will be sent to the email address you have within your sites lead forwarding. Click Here to learn more about setting up your Lead Forwarding.

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.



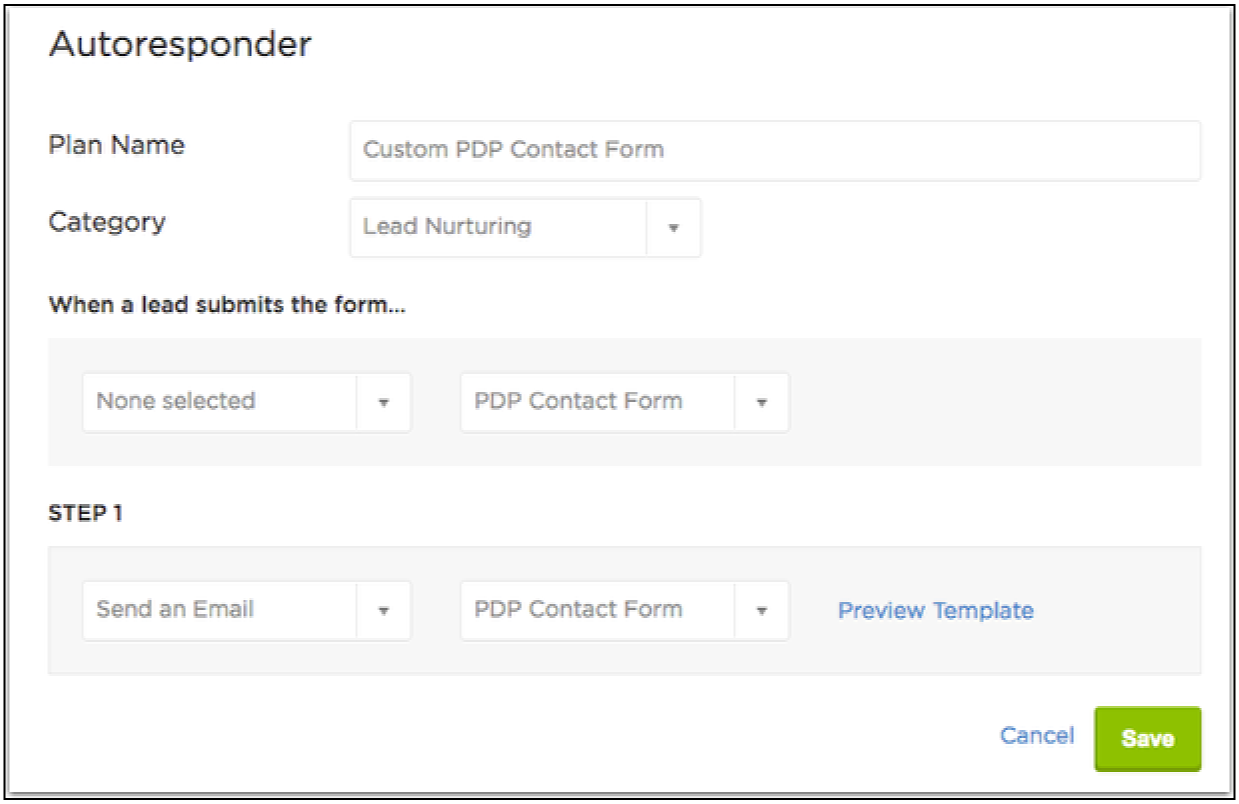
Autoresponders

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

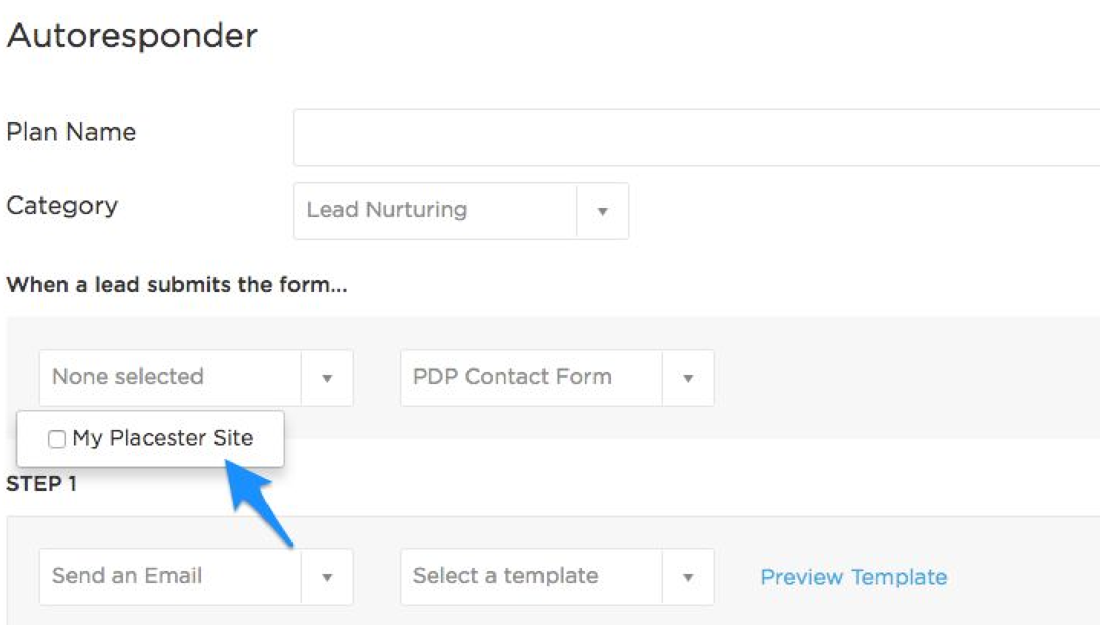
Editing an Autoresponder

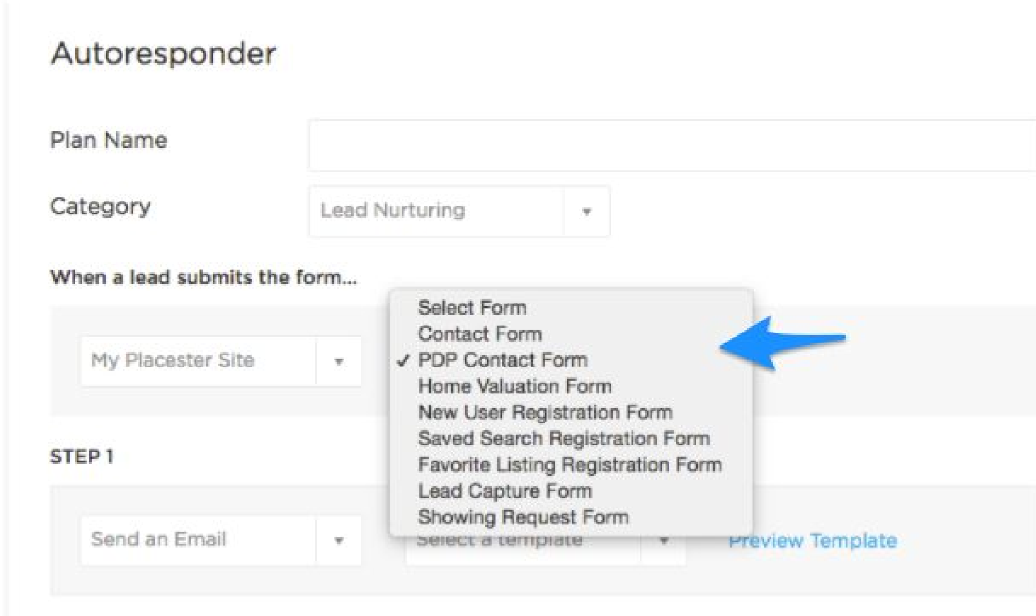
Like Plans and Templates, the default Autoresponders can not be edited directly. If you want to make a change to one of the default Autoresponders, you'll need to first Copy it.

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.

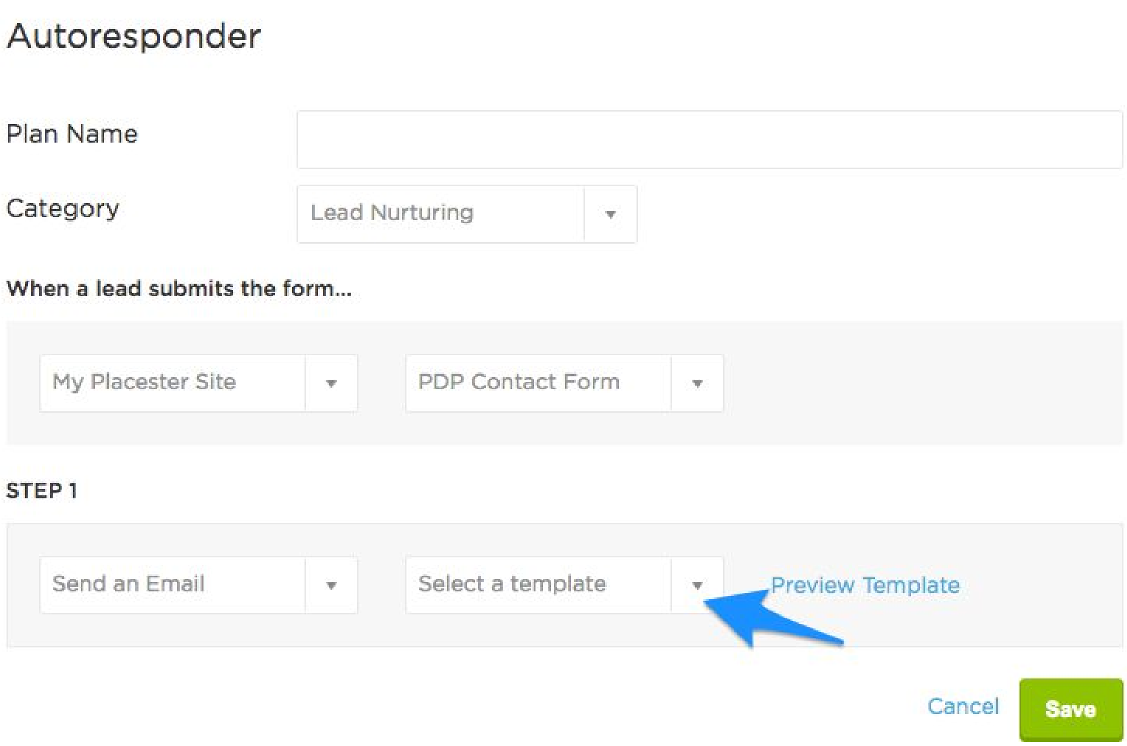


Next, you'll need to select the site that your Autoresponder will work on (if you have multiple sites, you can select one, some or all sites), and which contact form type you'd like it to apply to.

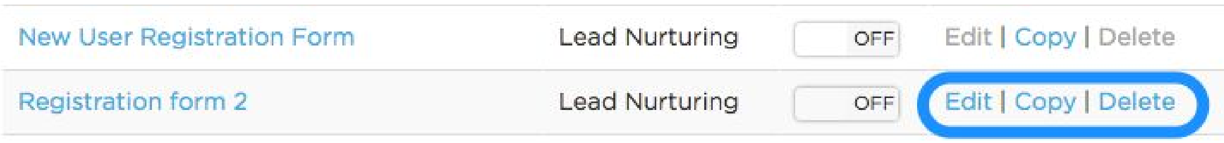




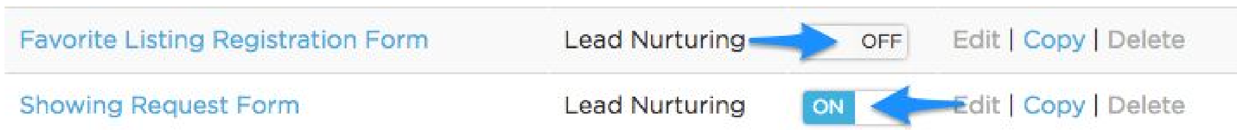
The final step is to select your template (Autoresponders can currently only send an email, so the first dropdown is set to only that action). Choose one of the pre-populated Autoresponder templates or one you've created yourself, then click Save.



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

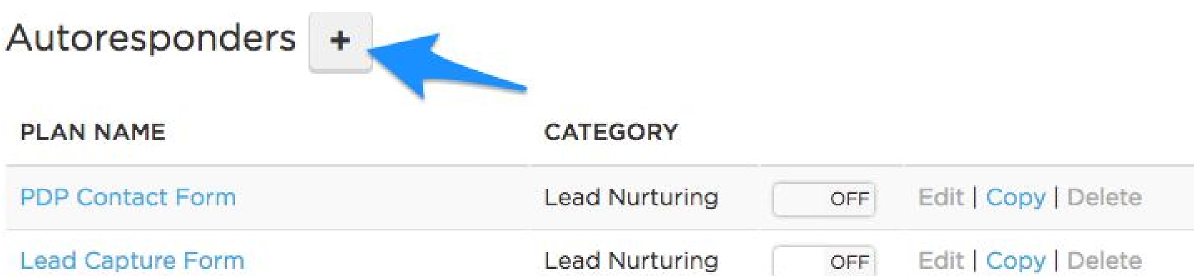


To turn an Autoresponder on or off, simply click on the toggle switch within the Autoresponder editor or on the list of Autoresponders.

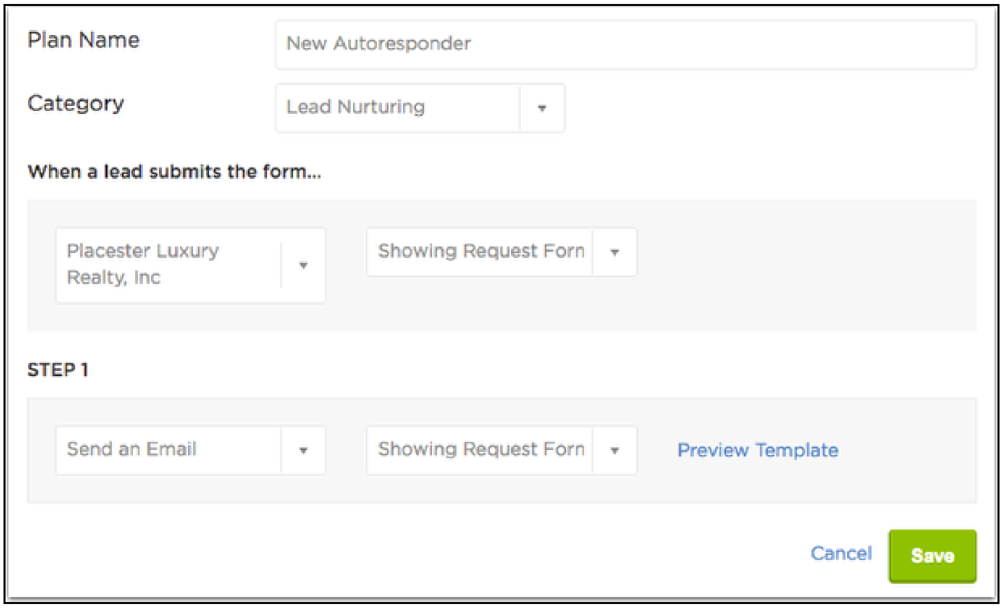


Creating a new Autoresponder

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

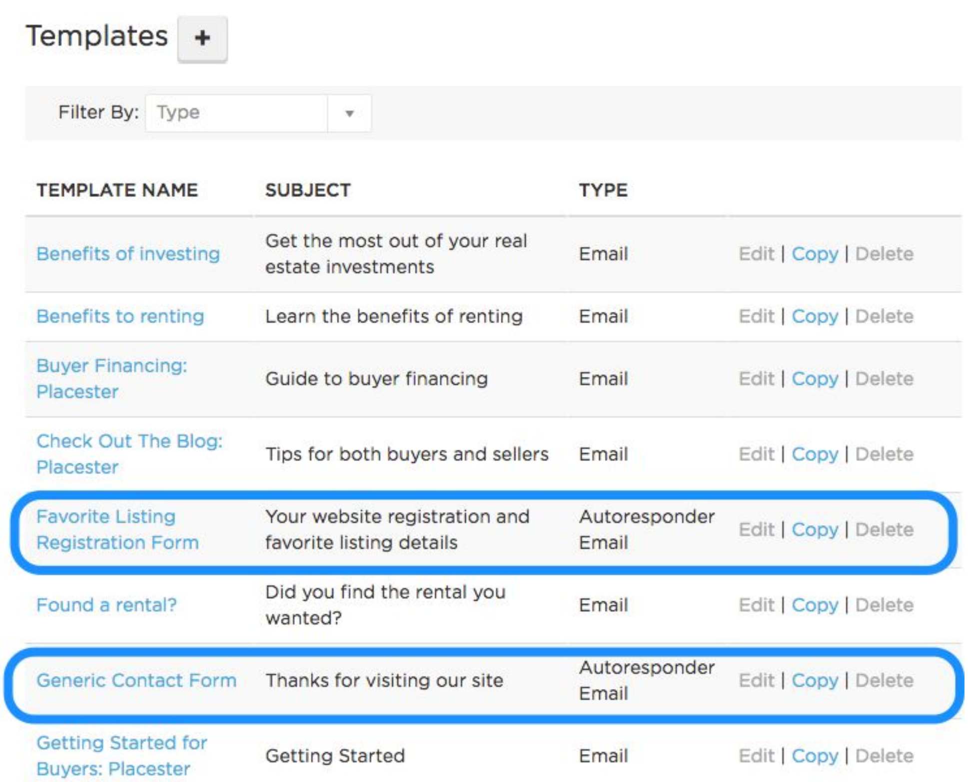


As with editing your Autoresponders, you just need to give the new one a title, select a Category, choose which Site(s) the Autoresponder will work on and select which Template will be sent, then click Save.



Autoresponder Templates

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



Templates +

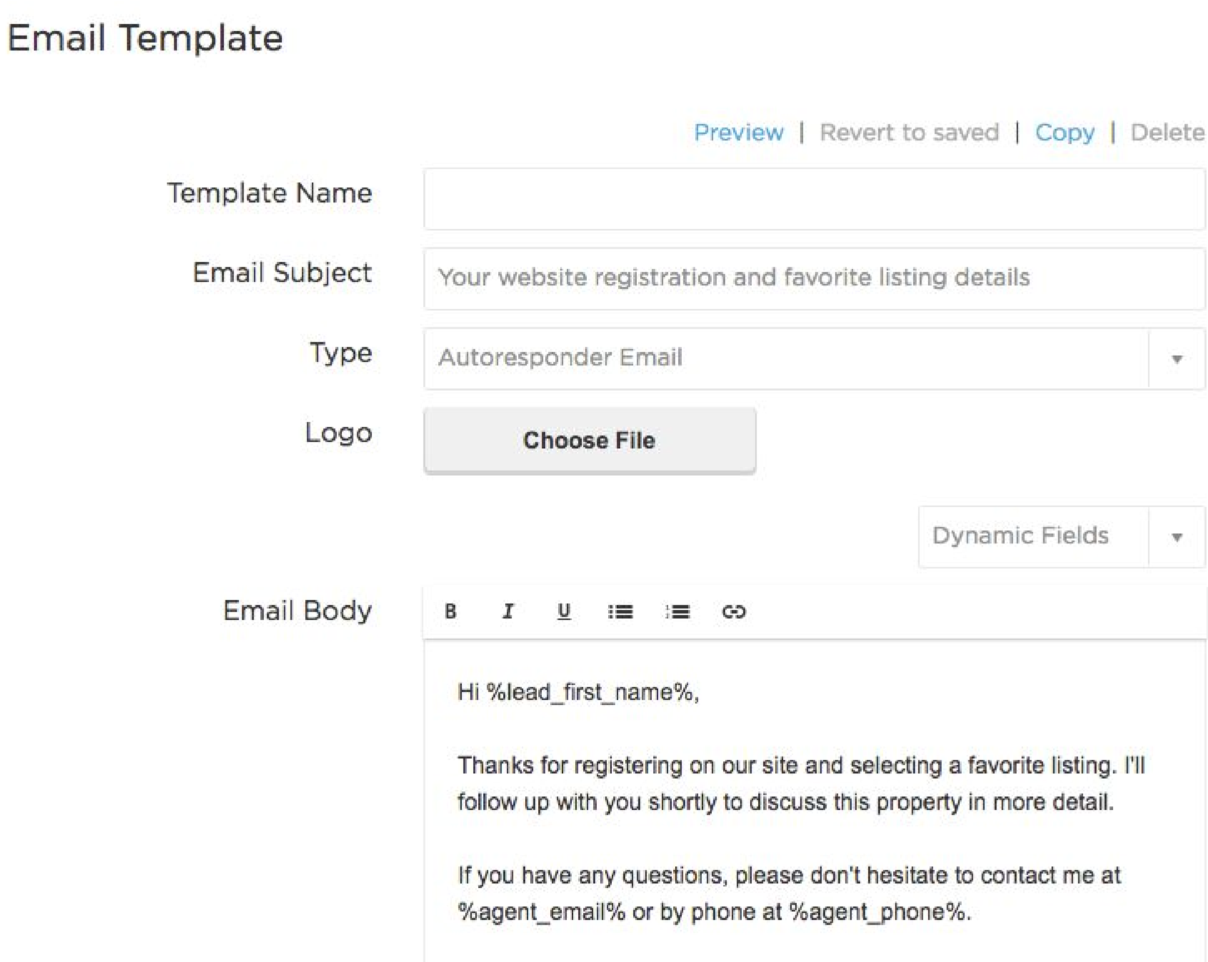
Filter By: Type

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.

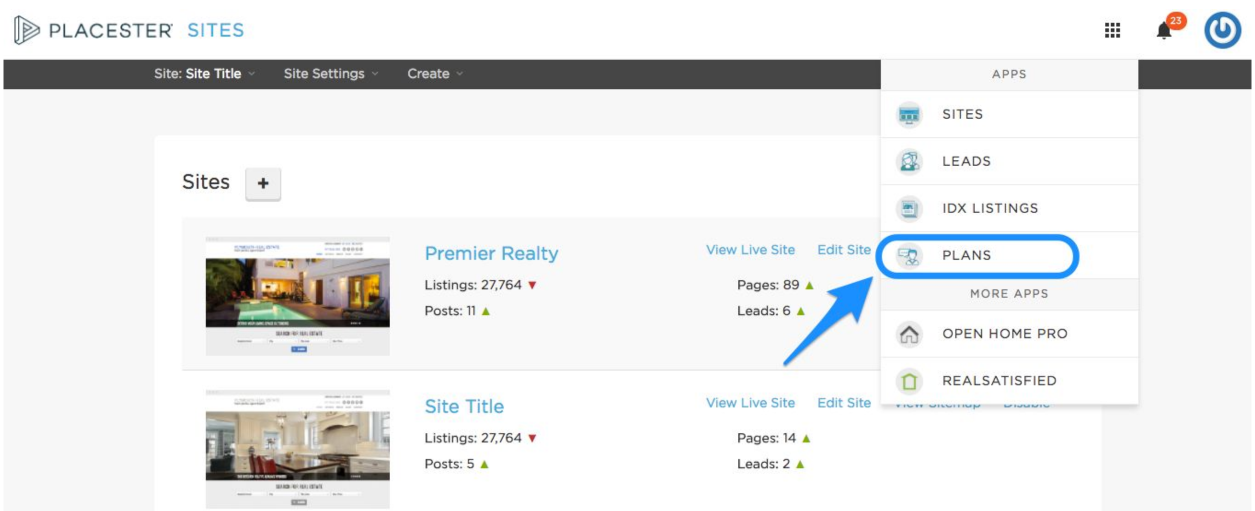


Plans

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.

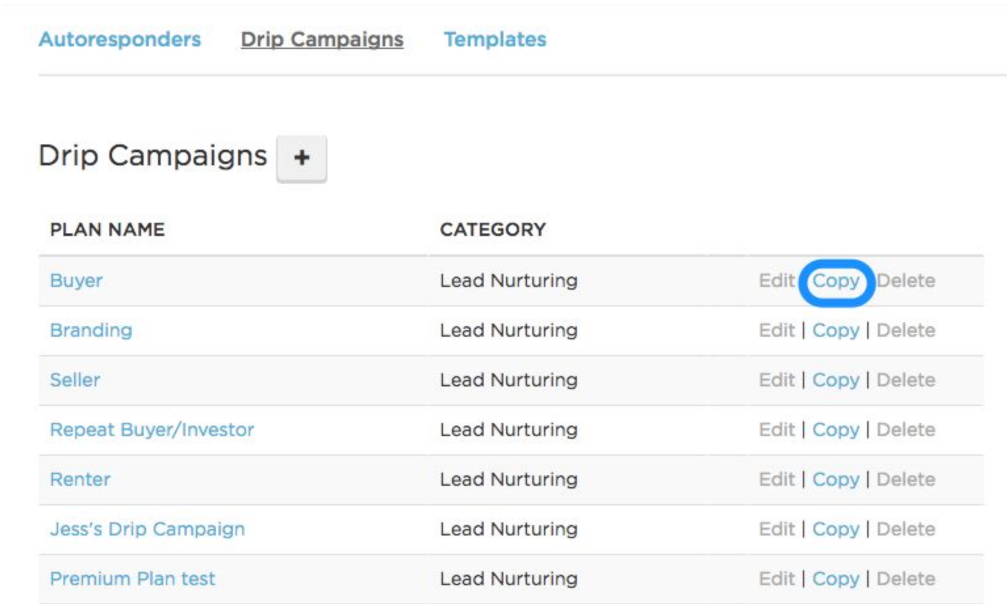
Plans Tab

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

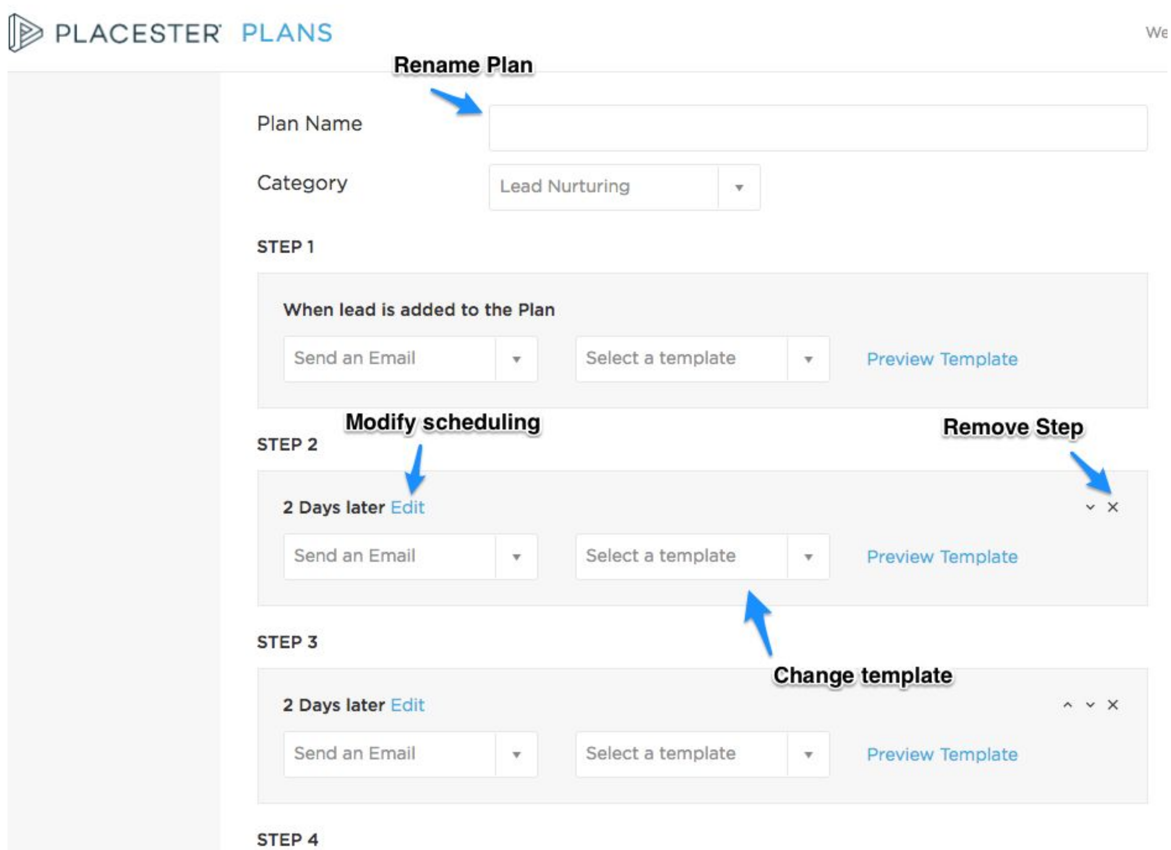


Editing an existing Plan

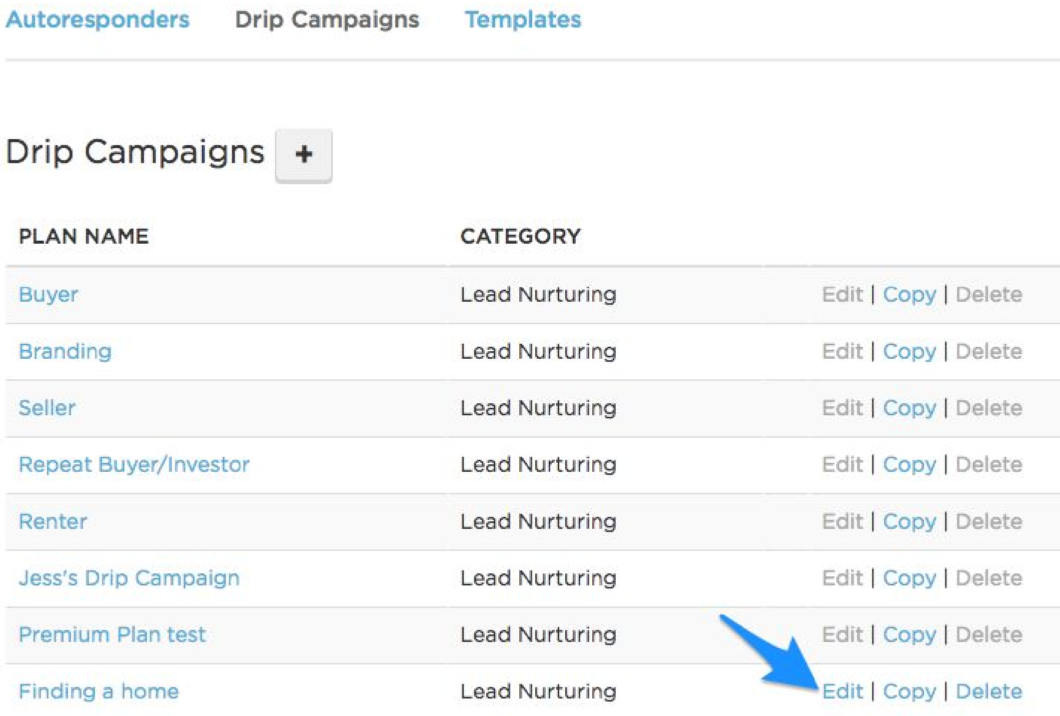
You'll see that the three Plans we provide only allow to Copy, not Edit or Delete. If you want to edit one of those plans, first you'll need to click Copy on the relevant plan.



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.



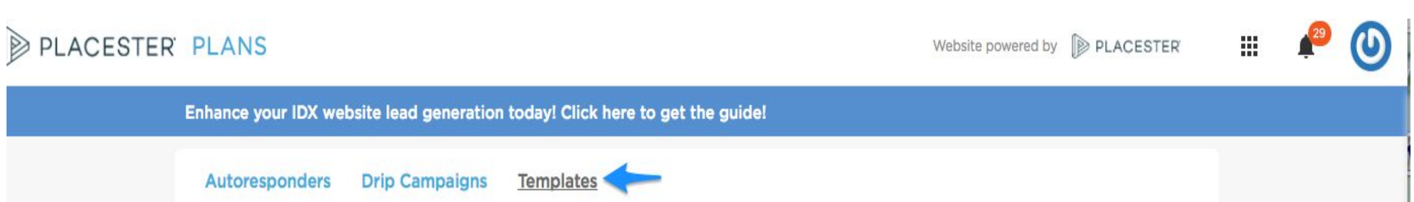
Once you've finished editing the Plan, click Save. You'll see your new Plan in the list. You'll see the edited Plan in your list. Now, you'll be able to edit this Plan whenever you want. You can also edit a new Plan that you created any time you like. For a new or previously edited Plan, simply click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



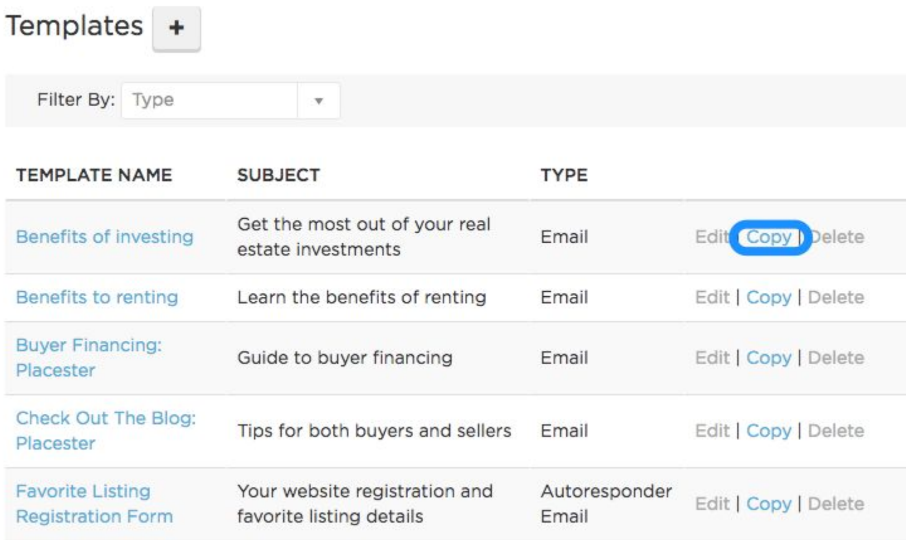
Email templates are the different steps that make up a Plan. Placester has provided pre-configured Plans and email templates, which you can edit to suit your own needs.

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.

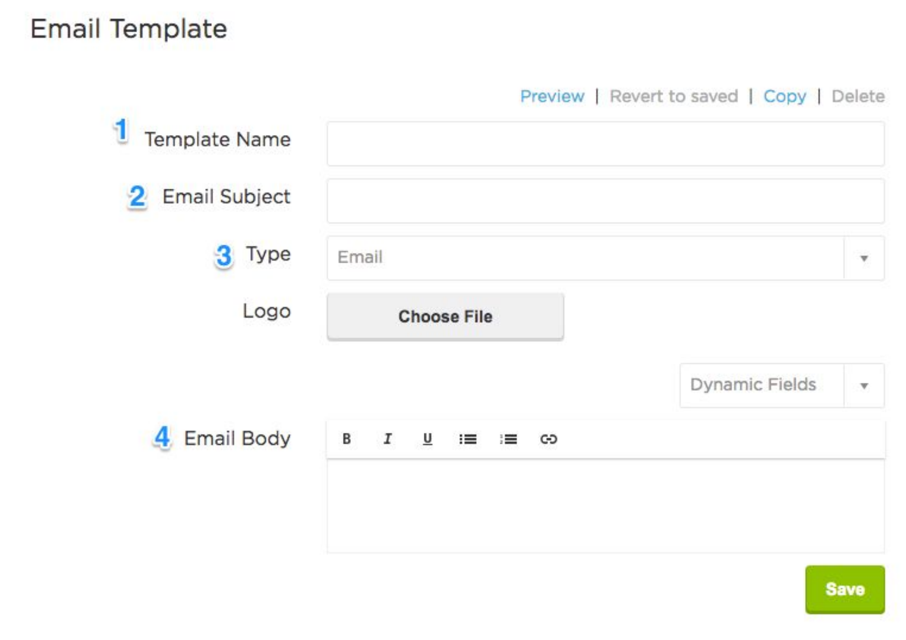

Templates +

Filter By: 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

Editing the Template

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

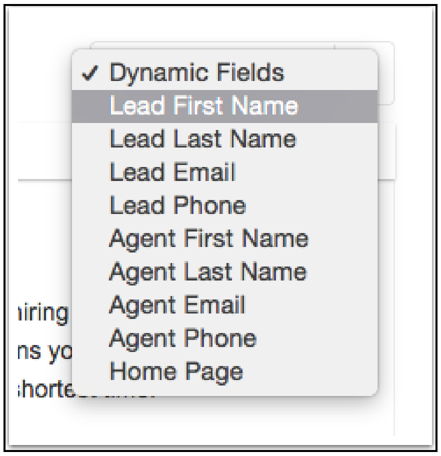


1. Template Name: What you'll see internally as the template name for adding the template to a Plan.
2. Email Subject: What the lead will see as the subject when receiving the email.
3. Logo: Your company or personal logo to add your branding to the email.

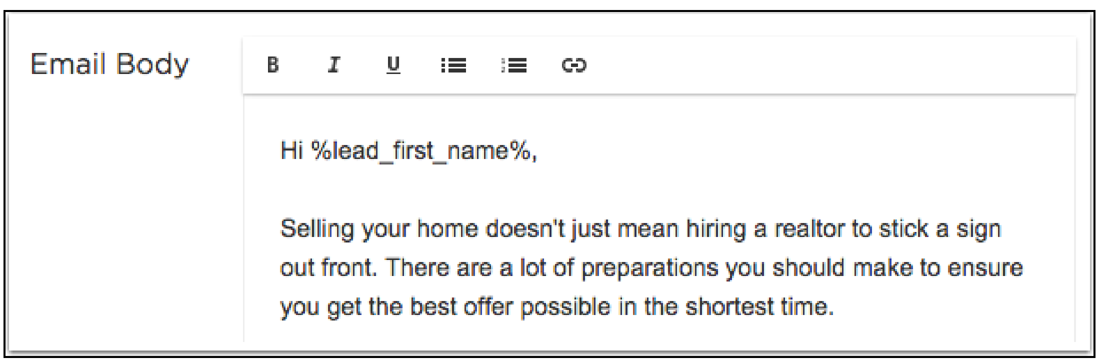
4. Email Body: The text to be included within the email.

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.



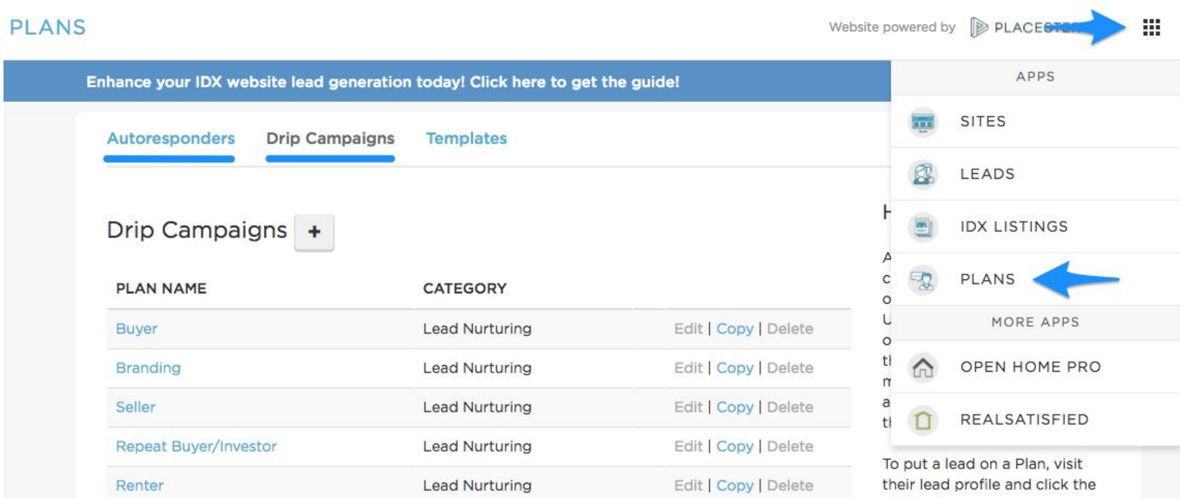
For instance, you can use Lead First Name to create a greeting that will automatically be filled in based on the lead that the Plan is assigned to.



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

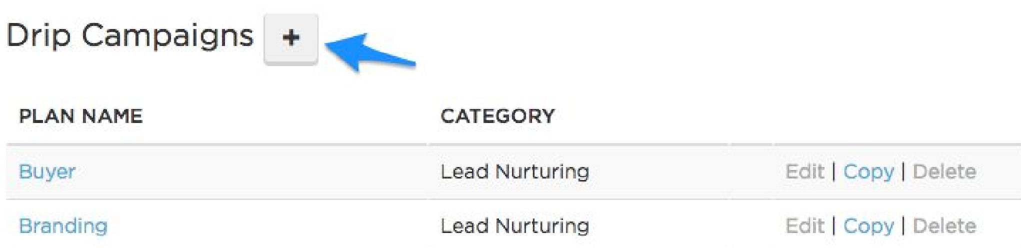
Drip campaigns

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



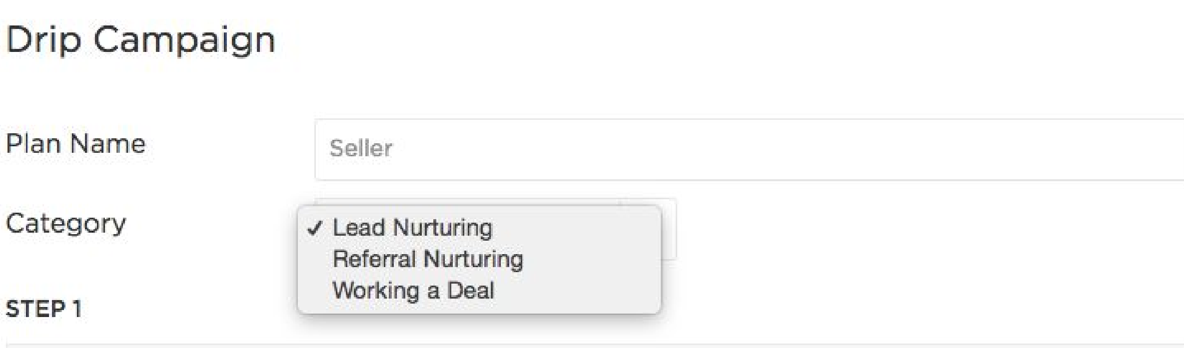
Adding a New Drip Campaign

Click the + button to create a new Drip Campaign.



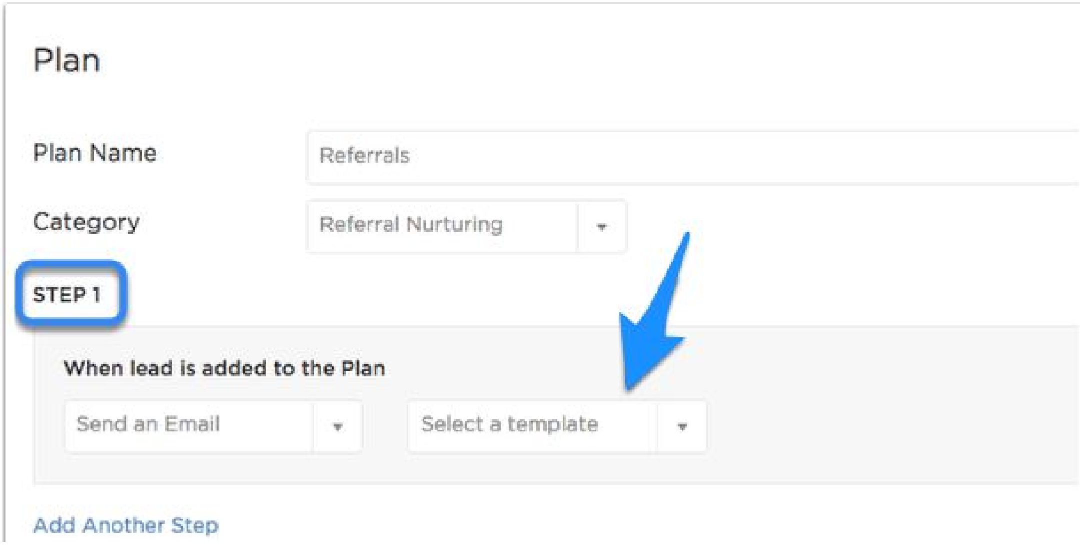
Creating Your Drip Campaign

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



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.

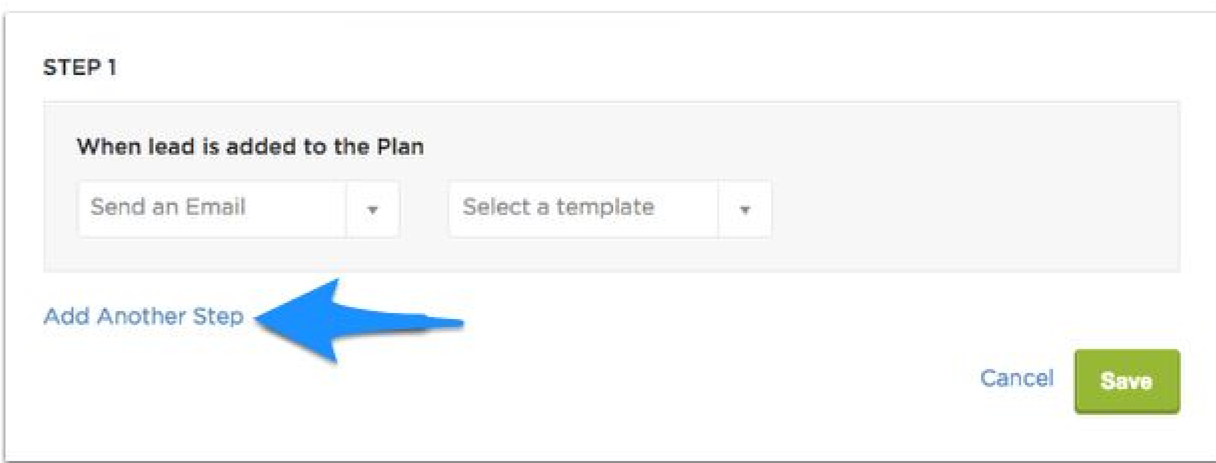


Pro Tip: Create Your Own Templates

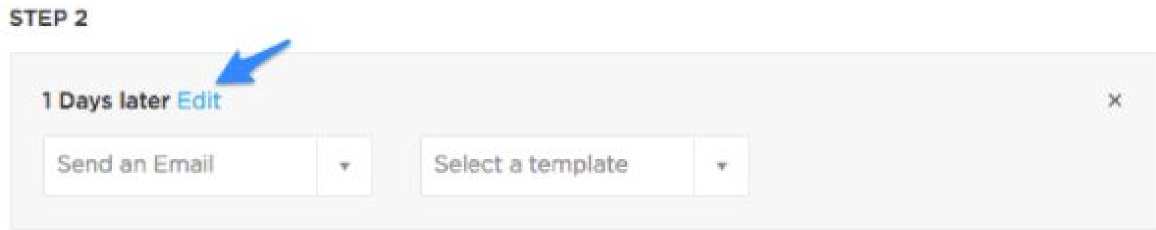
You can use our prebuilt templates here or create your own email template, which you can work on through Leads > Templates.

Adding Other Steps

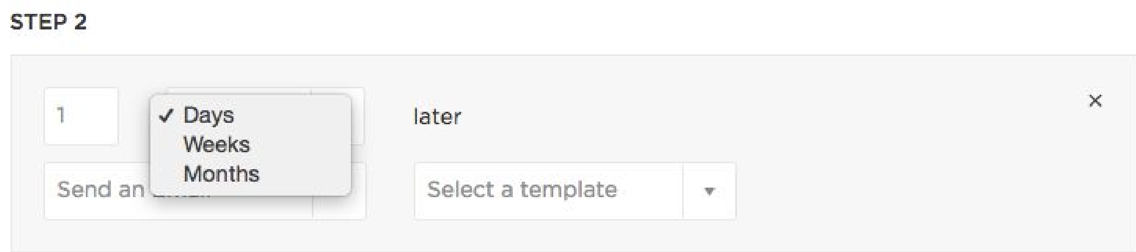
You have the option to add more steps to your Plan. Underneath Step 1, click on "Add Another Step."



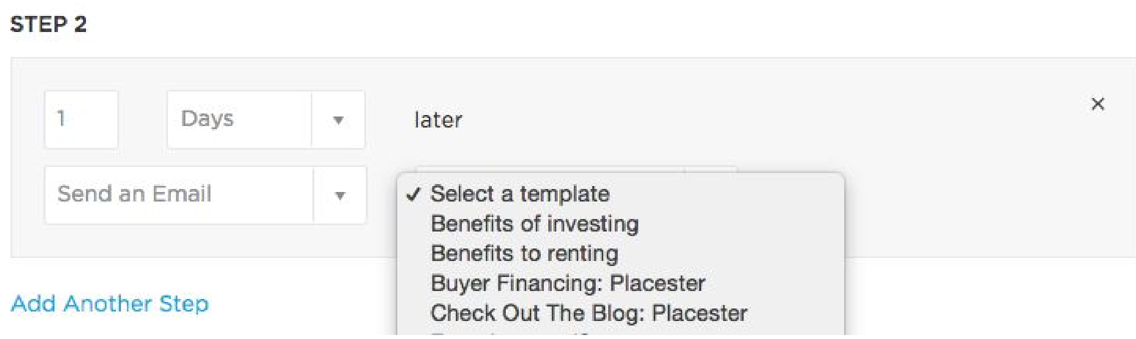
From here, "Step 2" will be added, where you can choose the timeframe between activities and again select an email template.   First click edit.



Choose timeframe from the list.



Choose the template you would like to use



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 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!