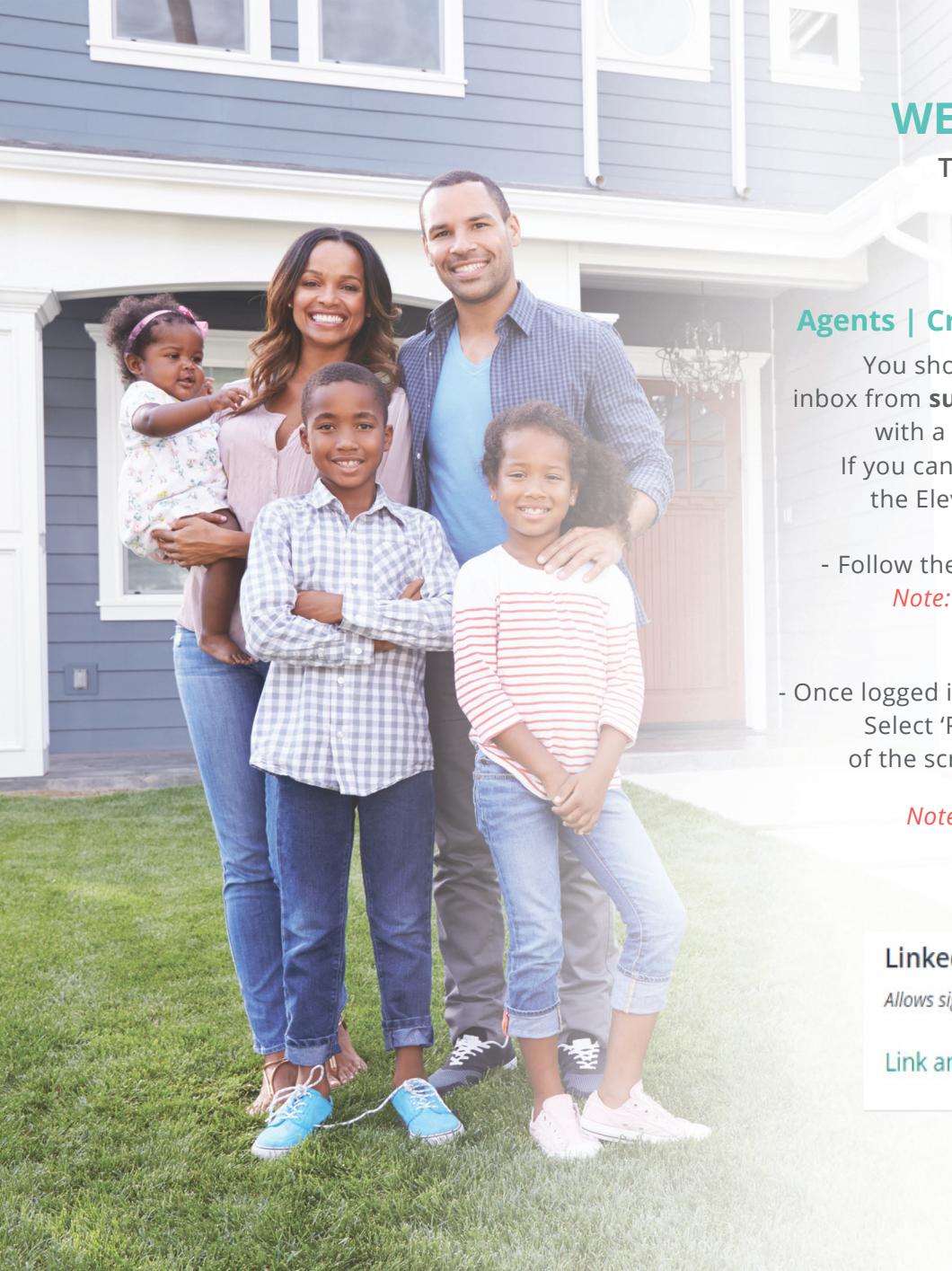


# HELPFUL HINTS & AGENT BEST PRACTICES



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## WELCOME TO ELEVATE

The 1st true productivity platform  
in real estate. Let's get started...

### Agents | Create Your NEW Elevate Login

You should have an email invitation in your inbox from [support@elmstreettechnology.com](mailto:support@elmstreettechnology.com) with a subject line "Welcome To Elevate."

If you cannot locate the email, please contact the Elevate Success Team at 888.378.3868.

- Follow the directions in your activation email.

*Note: Your username is your email address & you create your password.*

- Once logged in, Let's get you synced to your MLS. Select 'Profile' in the lower left-hand corner of the screen. Look for Link An MLS Account.

*Note: Select 'Profile' in the lower left-hand corner of the screen. Scroll to middle of page and click the green text:*

#### Linked MLS Accounts

*Allows sign-in via your MLS*

[Link an MLS account](#)

### That's it!

Log into your **NEW** Elevate account at [crm.yourelevate.com](http://crm.yourelevate.com).

*Note: You can also login by the link provided in your Morning Report and/or on your MLS home page.*



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## I'm logged in, now... where are my Listingbook clients?

Yea! All of your Listingbook clients  
(and their activity) are waiting for you.

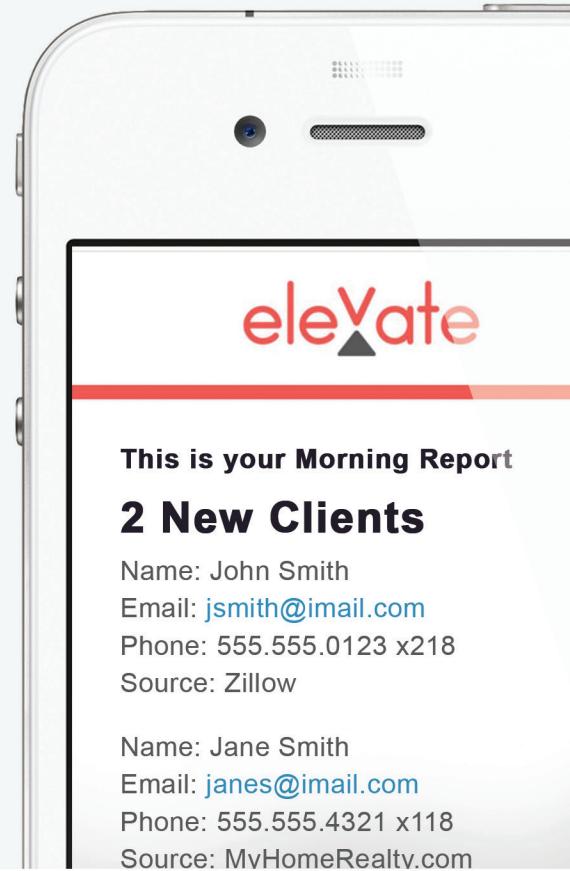
- Select "Contacts" on the left hand side.

*Note: Ensure all statuses are selected including Cold & Archived as they are in different statuses according to last login in Listingbook.*

## How do my clients login?

- All your clients need to do is click any link within their Morning Report.
- Once they do so, they will be prompted to create a **NEW** password to continue.  
*Note: They should use their email address as their username when setting password.*

Your clients (and leads!) can login to their account from your website and/or their Morning Report.



## Creating a NEW client account

Looking to create a single Elevate client account?

- Select "Create Client" under the "Clients" option inside of your Elevate account from the left-hand menu.
- Follow the set-up prompts and then select "Invite" to send an email invitation to your client.
- Under the Quick Navigation, select "Saved Search" and then "New Saved Search".

*Note: When creating an account for a buyer lead, be sure to denote "Active" or "Pending" when saving the search according to lead status.*

*Note: When creating an account for a seller lead, be sure to denote "Active", "Pending" or "Sold" when saving the search.*

*This is important because Morning Reports are customized based on the lead status you designate!*

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## Importing a NEW list of clients

Have a batch of clients you want to import into Elevate?

- Select "CSV Import" inside of your Elevate account from the left-hand menu.
- Follow prompts to attach your CSV file, making sure to select your desired headers.
- Import!

*Note: If you input a column for "Source" with anything in that column, it will automatically write to "Contacts".*

*If there is something in the "Source" column, it will write to "Leads".*

*Note: When you import a list of contacts, they will NOT receive an activation email unless you select "Apply Action" next to the contact's name on the left-hand menu and follow the prompt to invite.*

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## Creating a CMA

- Select “Create CMA” inside of your Elevate account from the left-hand menu.

- Follow prompts to identify your desired property and select On Market / Off Market comps.

*Note: Once you've completed the CMA, copy and paste the link provided in an email to your client.*



## Creating a FREE Open House Ad

- Select “My Open Houses” inside of your Elevate account from the left-hand menu.

- Follow prompts to create your Open House announcement.

*Note: Your Open House will display in matching buyer's Morning Reports, as well as on the MLS listing page. The announcement will automatically expire the day of the event.*

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## The Elevate Success Team is here for YOU

Have questions about your NEW Elevate account? We're here to help.



### HELP CENTER

Explore everything that is Elevate with step-by-step tutorials, easy-to-digest videos, training webinars, and more.

[tryelevate.com/support](http://tryelevate.com/support)



### CHAT WITH US

Select "Help" inside of your Elevate account from the upper right-hand corner. Chat during business hours or leave a chat message off-hours and we'll respond asap.

### CALL US

888.378.3868

Monday - Friday, 9am - 5pm EST

### EMAIL US

[support@tryelevate.com](mailto:support@tryelevate.com)