HELPFUL HINTS & AGENT BEST PRACTICES

FOR SMART MLS AGENTS

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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** 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.
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?

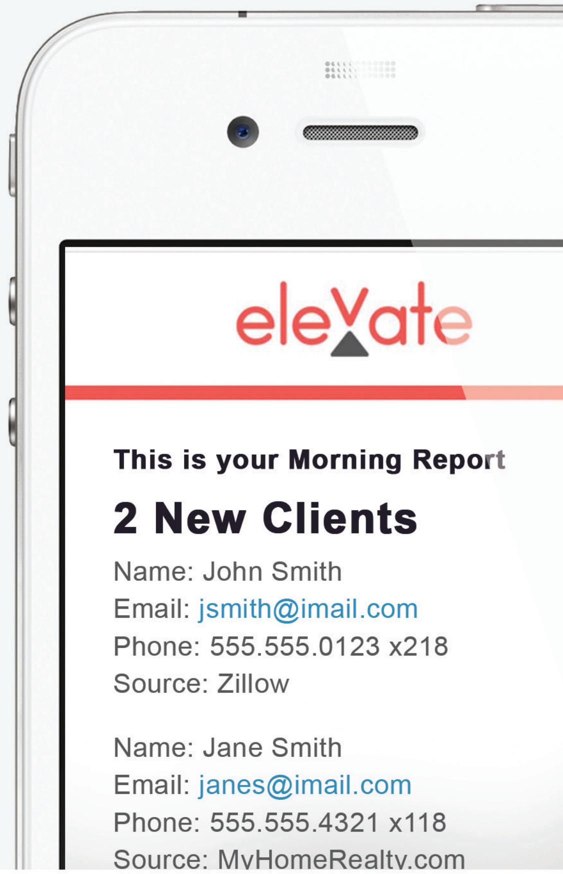
Yea! All of your Listingbook clients (and their activity) are waiting for you.

- 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!

Importing a NEW list of clients

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

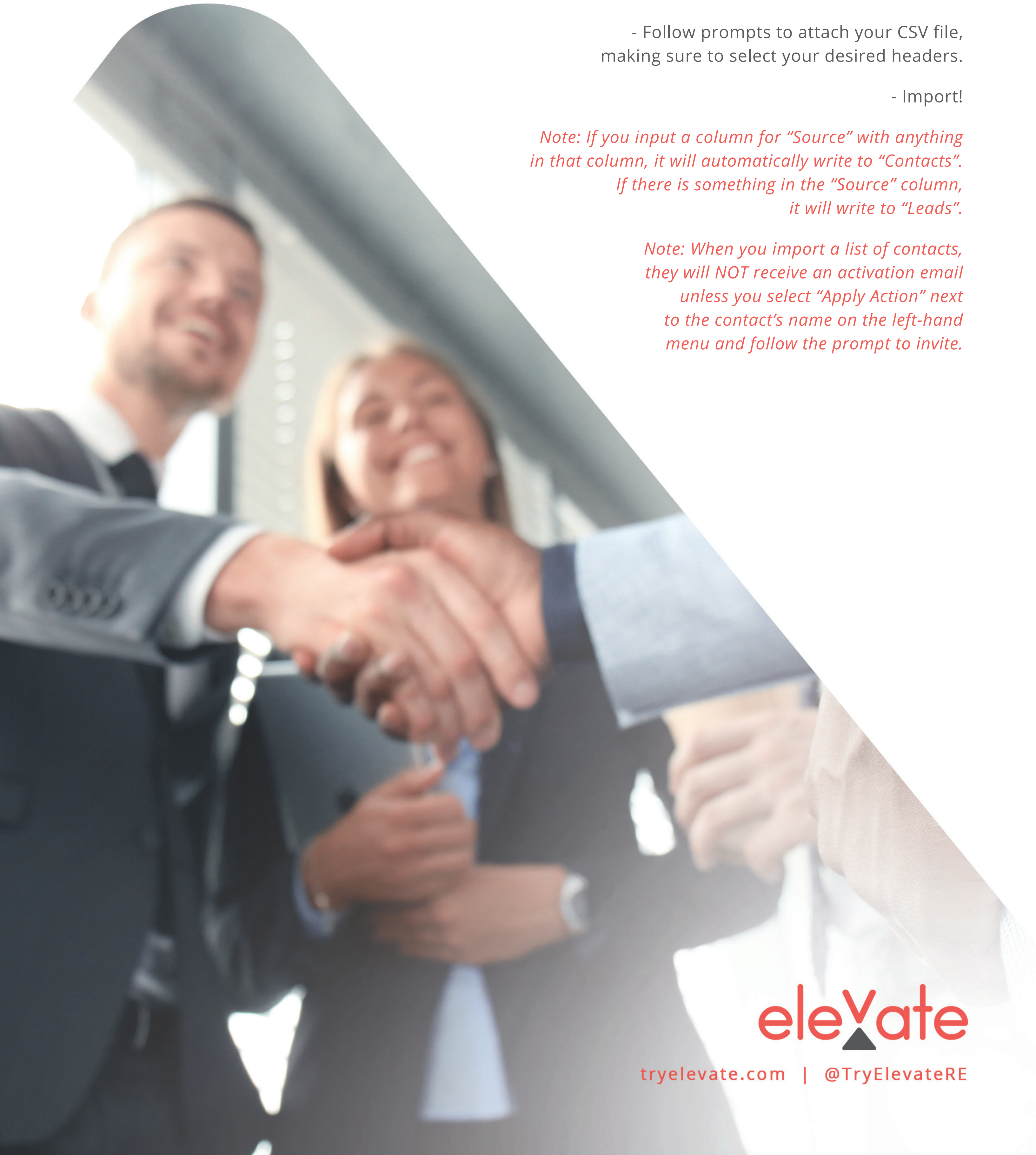
- Select “CSV Import” inside of your Elevate account from the left-hand menu.

- 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.



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.

Creating a Property Promotions

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

- Follow prompts to create your Property Promotion, select start date and click “Confirm”.

Note: Your listing will appear first for any clients whose saved search criteria matches the promoted listing. Your scheduled promoted listing will appear in the Client Morning Report on the first day of your scheduled promotion.

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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

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