



Quick Start Guide

Keller Williams Real Estate – Exton #331
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Welcome to Keller Williams

This purpose of this manual is to provide a quick start resource for new agents. This should not be used in place of the orientation; however, it will assist agents in getting setup quickly!

Keller Williams is the #1 Real Estate Company not only in size *but* also in the tools and resources it provides to their agents. Realizing that Realtors need to have multiple resources' at their disposal Keller Williams created the eEdge platform which combines all the top tools in one easy to use area. In order to get your business up and running as quickly as possible, we provide this quick start agent guide.

Initial Meeting – Step 1

1. Profile Completion – 100%

- A. Log on to KW.com – user name and password will be emailed to you from the MCA (klrw331@kw.com). You can change your password by clicking Technology on the large black menu bar and clicking on change password.
- B. Click on Profile
- C. My KW Info/White Pages
- D. Click on edit
- E. Complete all fields. If agent does not wish to use a personal social media platform, input either the Market Center Social Media Account Information or KW International Social Media Account Information. There should be no blank spaces.
- F. Upload Photograph
- G. Mobile Carrier - enter mobile number and carrier – then click validate keyword. A keyword will be texted to you. Enter the keyword then click validate key word. This is important as anytime a new lead search/saves on your website, you will receive a text
- H. Biography- enter a short biography about yourself
- I. Display URL – see Tech Admin.
- J. Ensure that the Yes button is checked for Display for Custom
- K. Click Save
- L. Exit Screen
- M. My Leads
- N. Click Edit
- O. Complete all information with a star next it as well as Mortgage Lead Email. If the agent does not know to whom to direct mortgage leads, suggest they use their own email.
- P. Click Save
- Q. Left side of the page, click 1.3 Manage Photo Library
- R. Click Browse and proceed to upload agent photo.
- S. Label the photo Office Logo so that it appears properly on the website.

TRANSITON QUICK START

- T. Click 2.0
- U. Click on 2.1
- V. Choose website template
- W. Click 2.4
 - i. Banner – Header – complete both fields
 - ii. Hosting – see tech admin
 - iii. Location – choose any other states in which you hold a license
 - iv. Broker/Team – Keller Williams Real Estate
 - v. Other Sections – See Tech Admin
- X. Click Save
- Y. Click 4.0
- Z. Click 4.1
- AA. Click checkbox applying for Wolf net IDX
- BB. Click Save
- CC. Click on 4.5
 - i. Mobile Property Search – the mobile URL will redirect your to a website with your Mobile App information
 - ii. Agent Code – Code you give to agents to when signing up for your site
- DD. Exit Screen
- EE. Other
- FF. Click Edit
- GG. Complete all sections, except Loss Mitigation Resume, which should only be completed if the agent is an expert in Loss Mitigation.
- HH. Click Save
- II. Click add services areas – Service Areas – Add Service Areas – spend time typing in names of counties, cities, towns, developments etc.... that you serve
- JJ. Click Save -Return to the KW Dashboard screen and ensure that the profile is at 100% completeness

2. Activate eEdge

- A. Log in to mykw.com
- B. Click Activate eEdge Now
- C. Click YES to start to activate the account
- D. Complete all required information
- E. Click complete order – it is not necessary to choose the upgraded account.
- F. Complete your website setup
- G. Your eEdge website serves as an additional lead source and capture system. An email address is also provided that will allow the agent to track all correspondences within the eEdge system
- H. Enter the primary zip code in which you conduct business.
- I. Decide your eEdge subdomain. This will be the link for your eEdge website. Be sure you DO NOT enter “www” or “http” into the field.
- J. What you decide for your eEdge subdomain will also be your eEdge email address.
- K. Click Finish Set

3. eEdge Dashboard Activation

- A. Access The Admin Page Click on + sign next to myMarketing
 - i. My Account - choose my account –
 - ii. Click Edit
 - iii. Complete all missing fields
 - iv. Add your Social Media Sites
 - v. Add Agent MLS Id – enter Trend - KELWLME
 - vi. Upload you images
 - Website image- upload photo
 - Marketing image – upload photo

TRANSITON QUICK START

- Marketing LOGO – only upload LOGO if you have one
 - vii. General Info – Ensure all information is correct – change time zone
 - viii. Activity Alerts – choose how you will alerted to leads
 - ix. MLS Admin –
 - Click Start MLS Admin –
 - Select TREND MLS- STOP
 - Notify Tech Admin that this is completed – the remainder will be completed by Market Center
 - x. Review remaining section
 - xi. Email
 - Set up Email Signature
 - Review remaining sections
 - xii. Click on Manage my eEdge Website
 - Main Text - review main text
 - Site Images
 - a. Choose site banner
 - b. Choose agency logo
 - xiii. Review remain sections
 - xiv. Shared Access Settings - review
 - B. Click on My Account -Settings – complete all fields
 - C. Billing and Shipping – log of billing and shipping
 - D. Click on Website
 - E. Click Main Text –create home page message
 - F. Click save
 - G. Edit sections as desired
 - H. Site Images
 - i. Click Site Banner and choose desired image
 - ii. Click Agency Log and choose desired image
 - I. Click Communities served
 - i. Click Add Community
 - ii. Type Name of Community
 - iii. Type Name of Zip Code
 - iv. Provide written description
 - v. Pin Location on Map
 - vi. Click Save
 - J. Review remaining Sections
 - K. Dashboard – Daily/Weekly/Monthly list of things to do
 - L. Emails and Reminders – emails from Market Leader Site
 - M. Contacts – Review of your Contacts
 - N. Market My Listings - review listings
 - i. Allows you to email listings to contacts
 - O. Review Reaming Sections
- 4. Business Cards – Signs – Marketing Collaterals**
- A. Business Cards, signs and other marketing materials can be ordered from any vendor that the agent chooses. To ensure that the logo’s, colors and franchise language is proper, the agent should choose from an approved vendor.
 - i. Log on to KW. Com
 - ii. On the right hand side of the page click on View all Vendors – next to the Find a Vendor
 - iii. [Google Search for Vendors](#)
- 5. KW email - Apply for a KW email account**
- A. Log onto KW.com
 - B. Click the Technology Tab
 - C. Click on KW email

TRANSITON QUICK START

- D. Choose sign up
 - E. Choose email name
 - F. Click save - The KW email address will not be approved for a few days.
Marketing Materials should not be ordered until the KW email address is approved.
 - G. Once approved, KW email will be accessible from Gmail.
6. Go to www.google.com
- A. Log into Gmail
 - B. Login in your KW email address
 - C. Password is the password that you use to log on to KW.com
7. Set Up DotLoop
- A. Click on Activate my Transaction of the eEdge Dashboard
 - B. Following Instructions on Dot Loop to set up account
8. Creating Loops
- A. Click on create loop
 - B. Name the Loop – Use Property Address
 - C. Complete all fields –completing field now will cause the contract and green sheet to auto populate
 - D. Click Save
 - E. Click Add People – Add each person that is a party to the Agreement of Sale along with their email address (if known) and assign their role in the transaction.
 - F. Click add documents – documents can be added in 3 ways
 - i. Computer – click on Computer and upload directly from computer
 - ii. Templates – click Templates and you will be redirected to variety of templates as well as the PAR forms
 - iii. Email – clicking email will copy the email address so that you can forward the email directly to the loop/folder
9. Market Leader Contact Import Sheet - [click here to download](#)
10. Reppert Factor - Reppert Factor is the IT Management Company whom maintains the Internet systems and security at the Keller Williams office. A user profile will be set up for you and if you wish to use a laptop/computer in the office, then an ‘authenticator’ will be installed on your computer. A representative from Reppert Factor will contact you to set up an appointment for the installation. You must be in the office for the installation and it takes between 1 and 2 hours. *They will ask you for your user name and password - your user name is the first initial of first name and your last name (Annemarie Hinds would be Hinds) and your password is password.*
11. TREND MLS – Activate your Trend MLS account
12. Suburban West – Activate your Suburban West Real Account
13. Realtor.com – Complete your Realtor.com Account
14. Complete your Showing Time Account
15. Market Center Intranet – in small blue letters directly under the myContacts-View Contacts click on myMarket Center Intranet
- A. Set up preferences
 - B. Ensure all information is correct
16. Post – In an effort to eliminate a barrage of emails, an online bulletin board is used. Agents may ‘Add Posts’ to the intranet. To add a post
- A. Click add Post
 - B. Choose type off post
 - C. Choose a channel
 - D. Complete all REQUIRED FIELDS –
 - E. Click Publish Post – not completing a required field will result in message not posting!
 - F. Associates – Search/Email any agent in our market center
 - G. Market Center

- i.* Calendar –
 - Education
 - Doctor on Call
 - Floor Schedule

H. Documents – important Documents for the market center

The Road to Business

1. Contacts

- A. Upload Your Contacts
- B. Click on View Contacts under the myContacts tab
- C. Click on Contacts on the blue menu bar
- D. Click on Manage Groups
 - i.* Type name of group on Create
 - ii.* Click Save
- E. Click on Contacts
 - i.* Click on Import/Export
 - ii.* Click on Select your type of contract list
 - iii.* Click on format that from which you are importing
 - iv.* Follow the instructions per type of file
 - v.* Click on set contact status – most contacts will be imported as inactive as active denotes contacts who are currently searching for a home
 - vi.* Choose contact type
 - vii.* Choose to add contact to group. Advise agents to upload agents to a group
 - viii.* Click browse to attach the profiles
 - ix.* Check box agreeing to the terms and conditions
 - x.* The file does not upload immediately. Scroll further down on the page to see the status of the imported jobs.

2. Viewing A Contacts Record

- A. Click on the contacts name
- B. The contact record will show all the any information need to take appropriate actions. It will also list any comments, emails reminders and groups associated with their contact record
- C. Key Areas
 - i.* Comments – area for agents to record comments
 - ii.* Emails – log of email sent thru eEdge
 - iii.* Reminders – log of reminders and/or area to set new reminder
 - iv.* Campaigns – log of exiting campaigns - or set new campaign
 - v.* Group- view the group placement – or set new group
 - vi.* History - log of the history of the contact
 - vii.* Leads - Leads come in to your eEdge control panel from a numerous listing syndication (Yahoo Real Estate, Tulia, Homes.com etc) Leads will also be funneled from the EAgentC website.

3. Lead Notification – you are notified of leads in the following manner.

- A. Via email
- B. Via Text
- C. Click on the myLeads to view contact record
- D. Lead Responder – the Lead will receive an automatic email generated by eEdge – 2 additional emails will follow

4. Marketing Materials – click on the plus sign next to my marketing to see the marketing options

- A. Create Marketing Materials
 - i.* Email Marketing – choose from templates to send emails to you clients

TRANSITON QUICK START

- ii. Print Marketing – create print marketing
 - iii. Campaigns – create campaigns
 - 8x8 – Unmets who have shown interest in selling or buying a home
 - 12 Direct – Farms
 - 33 Touch- marketed to Sphere of Influence (SOI)
 - iv. Choose desired Campaign
 - v. Choose delivery method
 - vi. Choose Next Step
 - vii. Choose Contacts to send - click save
- B. Buyer Book – Pre-Listing Book – Listing Book
- i. Click on Create Marketing
 - ii. Unclick all search options EXCEPT guides
 - iii. Choose desired guide and customize
5. **File Manage** – houses photos and customized materials
6. **MyAction Plans** -
- A. Click on Tasks Due to access the Action Plan Dashboard
 - B. View existing Task
 - C. Implement new plan
 - D. Click Start a plan
 - E. Choose by template or contact
 - F. Follow instructions
7. **myTransactions Dot Loot Procedures**
- A. Click on + next my Transactions
 - B. **Listings**
 - i. Each Loop shall contain a minimum of 3 folders within the loop and labeled as follows– executed listing docs - executed agreement of sale docs – executed closing docs. Loops may contain more than 3 folders however there must be a minimum of 3 folders.
 - ii. The aforementioned folders shall contain the required executed documents. These folders shall be submitted for review within the following time frame.
 - iii. Listing Docs – within 3 days of listing being taken
 - Consumer Notice
 - Listing Contract
 - Sellers Disclosure
 - Estimate of Closing Costs
 - Mortgage Payoff
 - Social Security Authorization
 - Trend MLS
 - Home Warranty
 - iv. Click SUBMIT FOR REVIEW
 - v. Executed Agreement of Sale Docs – within 3 days of the executed Agreement of sale.
 - Agreement of Sale – All Addendums
 - Pre-Approval/BFI
 - Estimate of Sellers Closing Costs
 - Signed Seller’s Disclosure
 - Co-op Brokers Compensation Letter
 - Trend MLS
 - Home Warranty
 - Referral
 - vi. SUBMIT FOR REVIEW

TRANSITON QUICK START

- vii. Executed closing docs - prior to submitting check to MCA.
 - Commission Checks
 - HUD 1
 - Marked up Title Report
 - Copies of ALL addendums - Copies of ALL Inspection Reports
 - Agent Referral Form
 - Additional Commission Amount
 - ANY AND ALL IMPORTANT TRANSACTION DATA/INFORMATION
 - SUBMIT FOR REVIEW

C. Sales

- i. Each Loop shall contain a minimum of 2 folders and labeled as follows - executed agreement of sale docs – executed closing docs. Loops may contain more than 2 folders but must contain a minimum of the 2 required folders
- ii. The aforementioned folders shall contain the required executed documents. These folders shall be submitted for review within the following time frame.
- iii. Executed Agreement of Sale Docs – within 3 days of the executed Agreement of sale.
 - Agreement of Sale – all Addendums
 - Pre- Approval /BFI
 - Estimate of Closing costs
 - Sellers Disclosure
 - Consumer Notice
 - Business Relationship
 - Affiliated Business Agreement
 - Social Security Authorization
 - Deposit Money Notice
 - Trend MLS
 - Co-Op Broker Compensation Form
 - Home Warranty Form
 - SUBMIT FOR REVIEW
- iv. ii. Executed closing docs - prior to submitting check to MCA.
 - Commission Check HUD 1
 - Marked up Title Report
 - Copies of ALL addendums - Copies of ALL Inspection Reports
 - Agent Referral Form
 - Additional Commission Amount
 - ANY AND ALL IMPORTANT TRANSACTION DATA/INFORMATION
 - SUBMIT FOR REVIEW

- D. Loop Name – all loops must be submitted using Property Address. Prior to submitting the loop please click on the edit details section and choose Use Property Address Field

Tools of the Trade

- 1. **Websites** Keller Williams Real Estate offers the agents 2 websites.
 - A. The eEdge Website is pre-search engine optimized and casts a net to catch buyers. Completing the agent’s profile to 100% and adding communities will increase the number of leads to which the agents receives.

TRANSITON QUICK START

- B. Setting up the Website was previously completed in steps 3R
- C. EAgentC Website – seller based website
 - i. Click on + sign next to myMarketing
 - ii. Click on Management EAgentC Website
 - iii. On the right hand column under the word Home- click on the various sections
 - 1. Edit Agent Team Section
 - a. Section 1 – complete all sections
 - b. Section 2 – complete 2.1 and 2. 2 to customize your website
 - c. Section 3 – optional information
 - d. Section 4 –Review Section 4.2 and 4.3 to co-market your listings
 - e. Section 4.5 – Mobile Property Search - provides agent individual property search app.

2. Mobile Property App

- A. Keller Williams provides each agent with their personally branded mobile app.
 - i. Click on + sign next to myMarketing
 - ii. Click on Management EAgentC Website
 - iii. On the right hand column under the word Home- click section 4.5
 - iv. Choose office location from drop down menu
 - v. Mobile URL provides the agent with a landing page on how to download their app. This is a good page to send to buyers.
 - vi. Agent Code is the personalized code for each agent. This code is used when the when person download the Keller Williams Realty App from the App Store or Google Play
 - vii. QR code is the agent specific code that will redirect the user to the app store to download the agent’s code.
- 3. **KWLS** - Keller Williams Listing Service – All listings entered into Trend will be scraped automatically into Realtor.com and into KWLS. KWLS will then filter all listings to Lithub (www.lithub.com), which will filter your listings out to more than 100 websites.
 - A. Click on the Technology Tab at the top of the page
 - B. Click on KWLS
 - C. ***To ensure that listings are filtered properly click List Hub enabled on the right hand side of the page.***
 - D. Access Listings on the left hand side of the page under Listings at a glance
 - i. Click on the hyper link to access all the agents listings
 - ii. Click on MLS number to edit listings.

4. Green Sheet

- A. Purpose - Green Sheet serves multiple purposes at the Exton Market Center
 - i. Application to First Land Transfer – Green sheet must be submitted to FLT with each sale
 - ii. Financial Information/Transaction Overview for Agent
 - iii. Financial Information/Transaction Overview for Agent
- B. Access
 - i. Click Technology on Back Menu Bar at top of Screen
 - ii. Click Create Green sheet
 - iii. Answer prompted questions
 - iv. Complete all Sections of Green sheet
 - General Information-complete all fields outlined in red
 - Price/Commission – Earnest / Escrow – complete all fields
 - Agent Detail – complete all fields – Field in red and shaded pink must be completed

TRANSITON QUICK START

- Co-Broker – Vendors – Notes – Complete to best of ability
 - Click Save for Later
 - Click Submit to MCA
 - Click Printable View – print document for FLT
5. **Wolfnet** – Wolfnet is the IDX provider to the EAgentC website.
- A. Click on the + sign next to myMarketing
 - B. Click on manage my EAgentC website
 - C. Click on section 4.0
 - D. Click on section 4.4
 - E. Click on Login
 - F. Access Wolfnet Information
 - G. Review all sections of Wolfnet

Tools

1. **ToolKitCMA**- another source of creating Buyers and Sellers Books – Listing and Buyers Presentations. - **Agents will receive a login and password for this site**
2. **KW Exton Intranet**
 - a. Click on myMarketing Center Intranet under the MyContacts – View Contacts button
 - b. Start – brings you back to the home page
 - c. Associates – Search and Email Agents in KW Exton Market Center
 - d. Market Center –
 - i. Calendar – calendar of Market
 - ii. Documents – Columination of Documents uploaded by Leadership for the Agents to use
 - iii. Received – Log of faxes received (outside service contracted by agents separately)
 - iv. Learn – Associate Resource of training
 - v. The Blend – location of office/regional/and national announcements
 1. Add Post – allow agent to post information on the intranet to reduce the number of emails sent throughout the day.
3. **Reports**
 - a. Log on to KW.com
 - b. Under the Profile button click on Reports
 - c. Click on Reports
 - d. Choose desired report
4. **Buyer Books/Pre-Listing/Listing Books**
 - a. Click the + next myMarketing
 - b. Click Listing and Buyer Presentations **OR**
 - c. Click Marketing at Black Menu Bar at the top of the page
 - d. Click Market My Business – Choose Plans