



myKW Cheat Sheet

VOLUME V

Your Guide To Using KW Technology Tools

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KW Command

KW Command--also known as Keller Command or the Keller Cloud--is the new, full-featured, Customer Relationship Management (CRM) and complete business management system developed in-house by KW International to eventually replace the eEdge CRM system and Dotloop paperless transaction system. Command was released to only LABS participants at Family Reunion 2018, and then to all KW associates in December 2018. The Command system is still evolving, so please be advised that this guide is accurate (if potentially not complete) as of 2018/12/17, but changes to the system may occur without notice. We at SLM will do our best to keep this guide up-to-date moving forward. For the latest information about the Command system directly from the KW International development team, visit KWConnect.com and search "latest in labs".

Accessing KW Command

1. Visit agent.kw.com
2. Log in using the username and password from mykw.kw.com

KW Command Menu

To access the sections menu, click the 3 horizontal gray bars at the top left, where the bottom one is shorter than the other two. Click the bars again to hide the menu

- Dashboard (House Icon)
 - Gives tile-based access to other sections
- Contacts (Two Person Silhouettes Icon)
 - Work with the contacts stored in the Command database
- Smart Plans (Bulleted List With Gear Icon)
 - Coming Soon as of this writing
- Unavailable Section (Hand Holding A Circle With Person Inside Icon)
 - Not available as of this writing
- Opportunities (Shaking Hands Icon)
 - Manage listing/buyer offers for contacts in Command
- Calendar (Calendar Icon)

- Not Available as of this writing
- Lead Accelerator (Megaphone Icon)
 - Manage Marketing Campaigns on social media, search engines, etc
- Designs (Paper/Tablet with Pencil Icon)
 - Create and manage mobile-responsive email templates with a click-and-drag interface
- Listings (Listing/Yard Sign Icon)
 - Not available as of this writing
- Groups (Three People Silhouettes Icon)
 - View/Interact with groups you are a member of in KW Connect
- Insights (Map With Location Marker Icon)
 - View/Share tips about certain areas with/from other KW Agents
- Unavailable Section (Whistle Icon)
 - Not available as of this writing
- Chat
 - Send instant messages to any KW associate found in KW Connect, including members of your team or [Referral Network](#)

Command Settings

Manage default and account settings for your Command system

1. Click your name in the top right
2. Click “Settings”

Connected Apps

By connecting other accounts to your Command database, you can keep track of communication and appointments with your contacts, create Marketing Campaigns on social media sites, and send email campaigns

1. Within “Settings” click “Connected Apps” on the left
2. To connect an existing account from the list, click “Connect Account” on the right
 - a. To connect an external account, that account must already exist
3. To disconnect a currently connected account, click “Disconnect Account” on the right

Apps Available To Connect

- Facebook Ad Manager
- Twitter Ad Manager
- Google Adwords Manager
- Gmail
 - To keep track of communications with your contacts
 - Command does not have a built-in email system, you will use your regular Gmail account and/or MailChimp
- Google Calendar
 - Track appointments with your contacts
 - As of this writing Command does not have the ability to add new appointments, only to view appointments previous added to Google Calendar
- MailChimp email campaigns
- eEdge
 - Copy contacts from eEdge into Command automatically

Archive

Restore or Permanently delete archived contacts. See [“Permanently Deleting Archived Contacts”](#) for more information

Deal Settings

Choose the default template from “Designs” that will be used when sending offers to buyers and/or their agent

Custom Tags

Add, edit, or delete tags (which function like groups) to separate contacts by

Contacts

Adding a New Contact

1. From the KW Command dashboard, click “Contacts” near the top left, or the icon of two people in the far left shortcut bar
2. Near the top right, click the red “Add New Contact” button
3. Enter any contact information you have
 - a. Only a name is required
4. Scroll to the bottom and click the red “Save Contact” button

Contact Field Options

- Name
 - First and/or last and/or nickname
- Full Legal Name
- About
 - Brief description/notes about the contact
- Date Of Birth - Month/Day/Year
- Tags
 - In Command, Tags function like Groups from eEdge
- Company
 - Type in a new company name or choose a company used in a previous contact
- Title/Profession
- Department
- Addresses
 - Currently not known if there is a limit to addresses
 - Choose whether address is “Home”, “Work”, or “Other”
 - Search for a location/address
 - First address entered will be “Primary” by default
 - Add second line (Suite/Apartment number, etc) for address

- Check box for mailing address
- Click “+ Add Address” to add another Physical Address
- Email Addresses
 - Currently not known if there is a limit to email addresses
 - Choose whether address is “Personal”, “Work”, or “Other”
 - Enter an email address
 - First address entered will be “Primary” by default
 - Click “+ Add Email” to add another Email Address
- Phone Numbers
 - Currently not known if there is a limit to phone numbers
 - Choose whether number is “Home”, “Mobile”, “Work”, or “Other”
 - Enter a phone number, including area code
 - First number entered will be “Primary” by default
 - Click “+ Add Phone” to add another Phone Number
- Social Accounts
 - Choose Social Media Site name
 - Enter username
 - Click “+ Add Social Account” to add another Social Media profile
- Relationships
 - Choose relationship type
 - Choose an existing contact from Command database to set as this contact’s relative

Viewing Contact Details

From the “Contacts” list, click on the contact you wish to view

Contact Details Page

- Basic contact info
 - Name, email, addresses, social accounts, about, etc
- Timeline
 - Shows all forms of contact entered into Command or from a connected Gmail account

- Click on an item for more details
- Opportunities
 - Shows information from “Opportunities” section for this contact
- Notes
 - Shows notes entered into Command
 - Click “Add Note” to add a new note
- SmartPlans
 - Shows SmartPlans this contact is assigned to
 - Unavailable as of this writing
- Plus (+) Sign Menu (Bottom Right Red Circle)
 - [Add New Opportunity](#)
 - Add Calendar Event
 - Unavailable as of this writing
 - Add Note
 - Log Interaction
 - Meeting
 - Call
 - Text
 - Quick Note

Editing an Existing Contact

1. From the “Contacts” list, click on the contact you wish to edit
2. From the Contact Details page, click the pencil icon next to the contact’s name
3. Make any changes
4. Click “Done Editing” near the top center of the page

Archiving a Contact

1. From the “Contacts” list, find the contact you wish to delete
2. On the far right of that contact’s row, click the icon of a curved arrow pointing right to Archive the contact

Archiving Multiple Contacts

1. From the “Contacts” list, click “Bulk Edit” near the top right
2. Check the box(es) to the left of the contact(s) you wish to archive
 - a. Alternatively, near the top of the page, click “Select Page” to select all contacts currently visible or “Select All” to select all contacts in the database
3. Near the top center click the “Select Action” dropdown
4. Click “Archive”
5. Click the red “Archive” button in the pop up to confirm

Permanently Deleting Archived Contacts

1. At the top right click your name
2. Click “Settings”
3. On the left, click “Archive”
4. Check the box(es) next to the contact(s) you wish to permanently delete
 - a. Alternatively, click the box at the top left of the list of archived contacts to select all
5. Click the red “Delete All Permanently” link at the top of the list

Restoring Archived Contacts

1. From the “Archive” page, check the box(es) for the contact(s) you wish to restore
 - a. Alternatively, click the box at the top left of the list of archived contacts to select all
2. Click the blue “Restore All” link at the top of the list

Bulk updating contacts

1. From the “Contacts” list click “Bulk Edit” near the top right
2. Select the Contact(s) you would like to update
3. At the top of the list click the “Select Action” dropdown
4. As of this writing, the only options are to either Archive or “Add Tag(s)”

- a. There is currently no way to bulk remove tags

SmartPlans

SmartPlans are unavailable as of this writing

Opportunities

Keep track of any offers made to or by one of your contacts, as well as percentages of each type of offer and how many offers you have versus how many contacts in your database.

Creating a New Opportunity

1. Return to the “Contacts” section
2. Click on the contact the opportunity is with
3. Near the bottom right of the Contact Details page, click on the red circle with a white plus sign
4. In the menu that pops up, click the top option for “Add New Opportunity”
5. Set the opportunity details (* = Required)
 - a. Select your Market Center*
 - b. Give the opportunity a name*
 - i. Last name + type (listing/buyer) is the default
 - c. Choose the opportunity type*
 - i. Listing or Buyer
 - ii. Renter/Lease/Etc not available as of this writing
 - d. For buyer, select a purchase time frame
 - e. Enter the expected closing date
 - f. Enter the expected commission percentage YOU will receive*
 - i. Not total commission for buyer+seller agent
 - g. Choose the opportunity phase*
 - i. Appointment or Active
 - h. Enter the address of the expected listing or property to buy

- i. Choose another contact from your database to be associated with this opportunity
 - i. E.g. spouse or partner
6. Click “Save Opportunity”
7. You will be taken to the Opportunity’s details page to add additional information, if desired

Viewing/Editing an Existing Opportunity

Opportunity Details

Opportunity Stage

Click the next stage on the line to move the opportunity to that position

- E.g. from “Appointment” to “Active” to “Under Contract” to “Closed”

Lost Opportunity

Lost Opportunity is unavailable as of this writing

General Info

- Opportunity Owner
 - Name of the agent to whom this opportunity belongs
 - If part of/lead for a team, may be a different team member
- Opportunity Name
 - Can be updated any time
- Team Name
 - Select your team name, if applicable
- Lead Source
 - Select a lead source
 - Only “Lead A” and “B” are available as of this writing
- Campaign Source
 - Name of the Marketing Campaign from the [Lead Accelerator](#) that this lead came in from, if applicable
- Related Contact

- A second contact (e.g. a spouse) from your database who is also involved in this opportunity
- Time Frame (Buyer Only)
 - 1, 3, 6, or 12 months
 - Currently no way to enter a custom time frame
- Budget (Buyer Only)
- Expected Commission (Buyer Only)
- Estimated Close Date (Listing Only)
- Commission (Listing Only)
 - Your part of the commission, not the total commission
 - If known

Seller Worksheet (Listing Only)

- Buyer's Agent Commission
- Seller's Agent Commission
- Seller Closing Costs
- Mortgage Balance
- Second Mortgage Balance
 - If applicable
- Prorated Taxes
- Prorated HOA dues
 - If applicable
- Show Net on Offer Comparison
 - Toggle this switch to have a "Net Proceeds" line included when comparing different offers to your seller

Documents

- Documents is unavailable as of this writing

Offers

Track both offers from your client to others, or from others to your client, respectively

Creating a New Offer

- Click “+ Add New Offer” to create a new offer
 - Enter an offer name
 - Click “Create Offer”
 - Offer Details
 - Version Name
 - Offer Date
 - Close Date [Expected]
 - Property (Buyer Only)
 - Select from KWLS if KW listing or enter address
 - Click “Parties” at the bottom right to continue
 - Parties
 - Buyer or Seller information will be auto-populated depending on the type of opportunity
 - At least name is required
 - Representation [Agent] information will be auto-populated depending on the type of opportunity
 - At least name is required
 - Click “Terms” at the bottom right to continue
 - Click “Back” at the bottom left to return to “Offer Details”
 - Terms
 - Payment/fees/amounts terms like any contract
 - Click “Agent Analysis” at the bottom right to continue
 - Click “Back” at the bottom left to return to “Parties”
 - Agent Analysis
 - Pros
 - Cons
 - Summary
 - Click “Save” at the bottom right to complete the offer
 - Does ***NOT*** automatically send the offer to the contact(s)
- Offer will be listed in “Reviewing” stage with the opportunity to Accept or Reject

Offer Actions

1. On the pertinent offer, click the three horizontal dots at the far right
2. Choose the action to perform:

Add Negotiation

1. Enter a negotiation name
2. Click “Next”
3. Using the same steps as creating a new offer, update any of the information or values for the counter
4. Negotiation will be listed on the Offer under “Previous Negotiations” near the bottom left
5. Negotiations can be edited or deleted using the Pencil or Trash Can icons on the far right

Edit Offer

1. Edit any incorrect information from the initial offer
2. Does not create a new Negotiation

Add Analysis

Adding Analysis is unavailable as of this writing

Send Offer

Sends the offer details, analysis, etc. to the email address associated with the contact(s)

Get Signatures

Get Signatures is unavailable as of this writing

Remove Offer

Removes the offer from the list and “Rejects” it by default

Comparing Offers (Listing Only)

1. Check the box to the left of two or more offers

2. Click “Compare Offers” near the top right
3. Click and drag left or right to reorder the offers
 - a. Chronologically, alphabetically, by net, etc
 - i. Net is only shown if “Show Net on Offer Comparison” is checked on “[Seller Worksheet](#)” section
4. Click “Email offer comparison” at the bottom right to send the comparison to your seller

Accepting an Offer

1. From the “Offers” list click “Accept” on the offer that your Seller has accepted, or that was accepted from your Buyer
2. All other offers will be automatically rejected
3. You can click “Change Response” if the deal falls through or “Accept” was clicked in error, in order to accept a different offer
4. Return to the “Opportunity Details” to move the opportunity to the “Closed” stage

Rejecting an Offer

1. From the “Offers” list click “Reject” on the offer that your Seller has rejected, or that was rejected from your Buyer
2. You can click “Change Response” to Accept the offer instead

Commissions

Commissions is unavailable as of this writing

Opportunity Stages

Click and drag opportunities within stages to different steps within that stage

- View total commissions for all deals within each step under a stage at the bottom of the step

From the “Opportunities” section, click on any of the stages in the “Listing” or “Buyers” section, depending on the type of opportunity you wish to view, to view only opportunities in that particular stage

Appointment

- Scheduling
- Scheduled
- Kept

Active (Buyer)

- Searching
- Showing
- Negotiations

Active (Listing)

- Staging
- Showing
- Negotiations

Under Contract

- Escrow
- Inspections
- Appraisal
- Financing

Closed

- Closed

Calendar

Calendar is unavailable as of this writing

Lead Accelerator

Create and Manage marketing campaigns on various social media sites and search engines right within Command, all in one place. To manage email campaigns instead, visit MailChimp.com, which can be connected to Command.

NOTE: These are NOT free email campaigns, there are fees associated with them. Charges are from the site(s) where the campaign is published, not from KW or SLM.

My Marketing Campaigns

Create a new Marketing Campaign

In order to create a marketing campaign for a particular site, you must first have a business account/profile for that site

1. Near the top right click the blue “Create New Campaign” button
2. Enter a name for your campaign
 - a. Internal, only you see this name
 - b. Up to 80 characters, including punctuation and spaces
3. “Select Ad Channel”
 - a. Facebook
 - b. Instagram
 - c. Twitter
 - d. Google
 - e. RealMailers
 - f. Coming Soon: LinkedIn
 - g. Coming Soon: Nextdoor
 - h. Coming Soon: Zillow
4. Select a beginning and end date for the campaign
5. Select a maximum amount to spend on the campaign per day
 - a. Optional: Set this as the starting point for spending on all Marketing Campaigns
6. Choose a goal for this campaign:
 - a. Attract Listings
 - b. Advertise a current listing (aka attract buyers)
 - c. Attract talent (hiring)
 - d. Brand Awareness
 - e. Event Awareness
 - f. Other

7. At the bottom, click “Configure Campaign”

Payment Profile

Manage your forms of payment for Marketing Campaigns. To add a new form of payment, click the blue “Add New” button near the top left

Archived Campaigns

View completed or manually archived Marketing Campaigns

Designs/SketchHouse

The Design Center or SketchHouse is where you can create and save mobile-friendly custom marketing pieces and templates using a drag-and-drop interface. In the future KW International will also provide complimentary templates in this section.

My Sketches

Find your created and saved designs to make copies and/or edit

KW Sketchbook

Find complimentary templates from KW International for each type of design. No designs are available as of this writing

Types of Designs

Email Templates

Create a mobile-responsive email template using a drag-and-drop interface including sections, widgets, images, and “embedded” videos, then save and/or download the HTML code to be used in your email or MailChimp.

Marketing Templates

Essentially the same (currently) as Email Templates

Market Snap

Presumably, eventually create CMA-type pieces for a particular area. Currently the same as Email Templates

Web Templates

Presumably, eventually create optimized, responsive web pages to use on custom sites or to embed into KW-provided sites. Currently the same as Email Templates

Listing Presentation

Presumably, eventually create an optimized, responsive email or printable piece for a particular listing/client. Currently the same as Email Templates

Creating A New Design/Sketch

1. From anywhere in the Design/SketchHouse, click “Create Custom Template” near the top right
2. Choose the type of piece you are creating (“Canvas Type”)
 - a. Email Templates
 - b. Marketing Templates
 - c. Market Snap
 - d. Web Templates
 - e. Listing Presentation
3. Near the top right, give your piece a name/title in the box with “New Template” next to a pencil icon
4. Just below the “Title” box, click/check the box for “View Components” to more easily see the parts of your marketing piece
5. On the right, drag and drop elements/sections into the canvas
 - a. “Parts” section (Four boxes icon)
 - i. Body
 - ii. Widgets
 - Pre-made pieces combining “Body” and “Component” elements
 - Currently has some issues
 - iii. Components
 - b. “Code Tree” section (Three horizontal bars stacked icon)

- i. Expand down into individual elements to show/hide or click and drag to rearrange
 - c. “Appearance” section (Paintbrush icon)
 - i. Change sizes of elements, spacing, font color/style/size, shadows, etc
6. Near the top left, click on the Desktop, Tablet, and Phone icons to resize the canvas to preview what your marketing piece will look like in those sizes
7. To the left of the “Title” box you can send a test email to yourself, or download the marketing piece as an HTML document to edit the code or import into your email system (like MailChimp)
8. At the very top right, click “Save to My Sketches” to save this template to be edited later
9. In the box that pops up, give the piece a name (or leave it the same as the title already set) and click “Save to MySketches”
10. Click the “Designs” icon on the far left to return to the SketchHouse

Editing an Existing Design

1. From the “My Sketches” page click on the name of your design
2. Make any changes
3. Near the top right click “Save to My Sketches”
4. Keep the same name to save over the existing design, or change the name to create a new version, leaving the previous design
 - a. Currently has issues
5. Click “Save to MySketches”

Listings

Listings is currently unavailable as of this writing

Groups

Interact with your existing KWConnect groups, or create a new group

Insights

View and share expertise about local places such as restaurants, shopping centers, tourist attractions, neighborhoods, etc.

Searching for Insights

1. Near the top left enter an address, city, or zip code to find Insights for
2. In the search results on the right, click the insight you want to view
3. You can vote Insights up or down if you did or did not find them helpful

Creating a New Insight

1. Click the “Create New Insight” button at the top right
2. In the box that pops up, choose whether the Insight is about a particular place, or an area
3. Search for the location/area in the “Location” box
4. Click on the location/area in the search results that drop down
 - a. A map icon will be added automatically
5. Give your Insight a title
6. Enter the details of your Insight
7. On the right, click the red Plus Sign (+) to add pictures
 - a. No limit as of this writing
8. At the bottom, click “Save Insight”
9. To exit creating an Insight, click anywhere outside the pop up box

Whistle Icon

Currently unavailable as of this writing

Building Icon

Currently unavailable as of this writing

Chat

Find the chat bar at the bottom right of any page within Command. You can send messages to members of your team, your KWConnect Referral Network, or any agent in KWConnect.

Starting a New Chat

1. In the chat bar, click on a person in “My Team” or “Referral Network” to start a chat with them, or click the Pencil icon to search for an agent in KWConnect to send a chat to
2. In the chat box, type your message and hit enter to send

Chat Options

Click the Gear Icon near the top right to add more people to the chat, rename the chat, or delete the chat. Or click the X at the top right to close the chat

Notifications

Find notifications under the Bell icon at the top of the page, just to the left of your name

New KW Website Powered by Placester

Your KW Website powered by Placester is the newest website provided to KW agents and is mobile responsive, SEO friendly, and has IDX and blogging capabilities built in. See this page to learn more about the similarities and differences between the two websites currently available to KW agents:

<http://scottleroymarketing.com/why-two-kw-websites>

Find the KW Website

1. Log in to myKW.kw.com
2. In the top black menu bar, hover over “Technology”
3. Click “KW Websites”
4. Click the red “Go to my website” button in the center of the page
 - a. If this button is not available, your site needs to be activated. See this page for instructions: <http://scottleroymarketing.com/activate-placester>

Site Settings

Listings

Check/Setup IDX Integration

1. On the left, under “Listings”, click “IDX Integration”
 - a. By default, the KWLS (KW Listings Only) will be selected
2. If your local MLS is listed, click the switch to turn your MLS “On” to the right
 - a. Multiple MLS organizations may be turned “On” if you are a member of more than one and have the connection set up
3. If your local MLS is NOT listed, check with your office to get the IDX setup process for this site started
 - a. Also see <https://scottleroymarketing.com/idx>
4. At the bottom right, click the green “Save” button

What is IDX?

IDX stands for Internet Data eXchange, which is the way that the MLS sends listing data to the agent's websites. Each KW agent should have three (3) IDX connections set up. See this page for more information: <http://scottleroymarketing.com/idx>

Global Filters

On this page, you can choose which listings visitors to your site can find. I.e. Only commercial, only residential, only for sale versus for rent, only a certain price range, only certain zip codes or cities. Note that these settings will limit what listings can be found anywhere on your site, so it would be unwise to make these settings too narrow (i.e. only your listings, or only your office's listings)

1. On the left, under "Listings", click "Global Filters"
2. Choose what areas/criteria you want to limit your listings to
 - a. i.e. city, zip code, min/max beds, min/max price, agent ID
 - b. To add a new search criteria, click the "Add Search Criteria" dropdown, and select the criteria, then click "Add" to the right
3. Click "Search"
 - a. A preview of which listings would show will list underneath
4. At the bottom, click the green "Save " button

Featured Listings

This section is where you choose which listings will display on the home page of your site, below the search bar or on a created featured listings page. Depending on the theme selected, anywhere from 4 to 16 listings will display on the home page, but all listings will display on the created page.

1. On the left, under "Listings", click "Featured Listings"
2. Choose what areas/criteria you want to limit your listings to
 - a. i.e. city, zip code, min/max beds, min/max price, agent ID
3. To add a new search criteria, click the "Add Search Criteria" dropdown, and select the criteria, then click "Add" to the right
4. Click "Search"
5. A preview of which listings would show will list underneath
6. At the bottom, click the green "Save " button

Open House Info

This feature is an upgrade add-on not provided through your KW subscription to Placester. To learn about adding Open House Info to a Single Property site, contact Placester directly: support-kw@placester.com

Site Design

Theme Selection

This section allows you to change the look and feel, and some coloring, on your site. NOTE: Do NOT choose a theme based on the picture displayed in the preview behind the search bar. The pictures on that slideshow can be changed at will. Choose your theme based on layout and coloring, instead.

1. On the left, under “Site Design”, click “Theme Selection
2. Use the arrow buttons to the right and left of the preview to scroll through the theme options
3. Once you have a theme you like, some allow you to choose a color scheme, below the preview
4. On the “Madison” and “Madison Metro” themes, you can choose for the header to be filled with the color chosen, with white text, or filled with white, with text in the color chosen.
5. On some themes, you can set a message to display over the slideshow, above the search bar
 - a. Up to 60 characters (including spaces)
6. At the bottom, click the green “Save” button

Slideshow

The slideshow displays behind the search bar on your home page. Your slideshow images are fully adjustable. Each theme allows up to 5 scrolling slideshow images. Please visit this help article for image resizing tips and to learn ideal slideshow dimensions for each Placester theme:

<http://support.placester.com/hc/en-us/articles/204487755-Tips-and-Resources-for-Cropping-and-Resizing-Images>

1. On the left, under “Site Design”, click “Slideshow”
2. Click “Select” on the preset template you would like to use, or click the Plus sign (+) at the top left to create your own
 - a. You can change the images contained within a preset template which will create a new slideshow
 - b. Click the “Upload” button to upload a new image

- c. You can add a caption for each image, if you like
 - i. Note that the caption will display in white text at the bottom left of the picture. There is no way to change the size or color of the caption, so it would help if your picture had a dark area near the bottom left
 - d. You can paste in a link for each image, which will go to that link when the image is clicked
 - i. I.e. for a specific listing, upload the listing image, then find the listing on your site, and paste that link in the “Link” box so that if that image is clicked, it will go directly to that listing’s page
 - e. At the bottom, click the green “Save” button to save the slideshow itself
3. At the bottom, click the green “Save” button to save which slideshow is selected

Certifications

1. On the left, under “Site Design”, click “Certifications”
2. Click on the Certification(s) you would like to display
 - a. Up to 6
3. At the bottom, click the green “Save” button

Social Media

1. On the left, under “Site Design”, click “Social Networks”
2. Type in the ending of your social media profile url as requested
 - a. i.e. facebook.com/scottleroymarketing would just be “scottleroymarketing” for the Facebook section
 - b. On LinkedIn, be sure to add “in/” before the rest of your linkedin URL. This is necessary, but not noted on the page. i.e. linkedin.com/in/scottleroymarketing would be “in/scottleroymarketing”
3. At the bottom, click the green “Save” button

Search Form

1. On the left, under “Site Design”, click “Search Form”
 - a. Depending on the theme, several search form options will be available
2. The “Omnibox With Autosuggest” is a KW-exclusive feature, and allows visitors to search the entire listing using regular expressions, rather than dropdown options
 - a. i.e. “3 bedroom 2 bathroom austin, tx fence pool 1500 square feet” in the box, rather than selection different dropdowns for each piece
3. At the bottom, click the green “Next” button

4. Depending on the search box selected, additional items to add/remove may be available
5. At the bottom, click the green “Save” button

Menu

1. On the left, under “Site Design”, click “Menu”
2. To rearrange menu items, click and drag them into the order you want
3. To create a “sub menu” drop down, hold one menu item on top of the other then release
 - a. It will then be indented below the main menu item
4. To add a new button, click the dropdown labeled “Home” under all of the menu options
5. Click the name of the previously created page to add, or “Custom URL”
6. Click “Add”
7. At the bottom, click the green “Save” button

***Would you like a custom link on your website menu to feature your app? Visit <http://scottleroymarketing.com/support/app-menu> to have this setup for you

Add a Custom URL to your Website Menu

1. On the left, under “Site Design”, click “Menu”
 - a. As of 2018-08-13 this link is “grayed out” but still functional
2. Click the dropdown labeled “Home”
3. Click “Custom URL”
4. Click “Add” to the right
5. In the “Label” box, enter the text to display on the menu button
6. In the “URL” box, enter/paste the full URL (including http://)
7. Optional: In the “Tooltip” box, enter a short message that will display when the cursor hovers over the menu button
8. At the bottom, click the green “Save” button

Site Info

1. On the left, under “Site Design”, click “Site Info”
2. Site info fields:
 - a. Brand Name: Displays near the top left of the site, next to the site logo
 - b. Tagline: AKA slogan/catchphrase, displays below the Brand Name

- c. Logo: You can add a new logo or choose from existing Placester logos in the system (note not all Market Centers have a logo within Placester
 - i. If your office/MLS requires your office's logo to show on the site, this is where to upload it
 - d. Site Header: Choose whether or not to display the above 3 fields
 - e. Upload Favicon: upload the icon that displays in the browser bar at the very, very top
 - i. Square
 - ii. Simple is best (i.e. just a letter or two, or recognizable symbol/logo)
 - f. Name: Your name to display on the home page
 - g. Email: The email address that a new message will be composed to when "Email Me" is clicked on the home page (Can only be in the "Email Me" text, cannot display plain text of your email address, or change to say "Email Us")
 - i. When "Email Me" is clicked, it will open THAT computer's default email program, cannot be specified within the site
 - h. Phone: Displayed next to "Email Me"
 - i. On mobile devices, will call that number when tapped
 - ii. If multiple numbers are entered, an error will occur when tapped (it will try to dial both numbers as one long number)
 - i. Photo: Upload your picture
 - i. On the site, if the top of your head seems cut off, upload a picture with more space above your head
 - j. Company: Your office name
 - k. Email: Your office email
 - l. Phone: Your office phone
 - m. Address: Your office address
 - n. City: Your office city
 - o. State: Your office state
 - p. Zip: Your Office Zip
 - q. Meta Title: The blue title displayed on search engines when you are found in search results
 - r. Meta Description: The gray text displayed below the blue title on search results
 - i. This is not the place to load up tags (i.e. homes for sale houston, houston real estate, houston houses, houston). This is read by actual people when you display in search results, and should be a helpful description of what will be found on the site
3. At the bottom, click the green "Save" button

Lead Capture

1. On the left, under “More” click “Lead Capture”
2. Select Passive or Aggressive for the Lead Capture options
 - a. Passive: Visitors can view all listings without submitting contact information
 - b. Aggressive: Visitors must submit contact information before viewing any listings
 - c. For additional lead capture options (i.e. only require information after X listings) contact Placester directly to upgrade
3. In the “Lead Forwarding” section, enter any emails you want to be notified of a new lead coming in to your Placester site, separated by commas
 - a. Make sure to include your eEdge “@kwrealty.com” address, so that leads from this site will automatically be added to your eEdge database ([See Update Information That Auto-populates on Marketing Material](#) to find this address)
4. At the bottom, click the green “Save” button

Custom Domain

1. On the left, under “More” click “Custom Domain”
2. To edit your “.kw.com” site address:
 - a. Click “Edit” next to the existing address
 - b. Type what you want before the “.kw.com” section
 - c. Click “Check Availability”
 - d. If the domain is available, click the green “Save” button
3. To add a custom domain that you have already purchased:
 - a. In the “Add a custom domain” box, enter the full address of your site, including “www.”
 - i. i.e. “www.scottleroymarketing.com” rather than just “scottleroymarketing.com”
 - b. Click “Add Domain”
 - c. Click the “step-by-step help articles” link on the right for step by step instructions on how to configure your domain at your domain registrar to properly connect to your site

***Having trouble mapping your custom domain? We can set it up for you!

Visit <http://scottleroymarketing.com/domain-forwarding>***

Site Tracking

In this section, you can connect to tracking services to track site visitors' activity (not contact information) on your site. I.e. where they came from (search engine, typed the address, email link), how long they were there, which pages they looked at, etc for Google Analytics, Google Adwords, and Facebook business.

1. Tracking ID: The Tracking ID provided by Google Analytics
 - a. In the format "UA-#####-01"
2. Conversion ID: Provided by Google Adwords
3. Conversion Label: Set within Google Adwords
4. Facebook Pixel ID: Provided by Facebook Business
5. For more information on each of these services, contact the providers directly or visit www.SLMTips.com

Site Verification

In this section, you can add the required information to verify that you actually own this site for Google Webmaster Tools, Bing Webmaster Tools, Pinterest Business, and Google Plus.

Pages

Pages are static areas of your site that will not be updated frequently, and do not provide information that is shown in a blog post, agent page, testimonial, or area. I.e. Buyer/Seller Resources, your preferred vendors, recently closed listings, etc

Create a Custom Page

1. At the top, next to "Site Settings", click "Pages"
2. Click the Plus Sign (+)
3. In the "Template" dropdown, choose what kind of page you are creating:
 - a. Default Page Template: Simple page where you can add your own content without any special formatting
 - b. About Page: Should already exist. Add your bio/experience, etc
 - c. Agents Index: Lists all of the agents that have a page created under "Agents" (see "Agents" section)
 - d. Areas Index: Lists all of the service areas that have a page created under "Areas" (see "Areas" section)

- e. Blog Post Index: Should already exist. Lists all of the blog pages that have been created under “Blog” (see “Blog” section)
 - f. Client Profile: Should already exist. Displays favorited properties for site users who have created an account and favorited properties
 - g. Contact Page: Should already exist. Contains the contact form. Additional information to be displayed below the contact form can be added under “Page Content”
 - h. Custom Landing Page: Not available through KW subscription. Contact Placester directly to upgrade
 - i. Featured Listings Page: Shows all listings that meet “Featured Listings” criteria, not limited to however many the theme shows on the home page
 - j. RSS Feed Index: Lists blog posts from another site (i.e. your existing blogspot or activerain site)
 - i. Requires an RSS feed URL
 - k. RealSatisfied Ratings and Reviews: Lists testimonials from RealSatisfied
 - i. Requires setup/login to RealSatisfied
 - l. Testimonials Index: Lists all testimonials added under “Testimonials” (see “Testimonials” section)
4. Add your page content (if applicable)
 - a. Supports some HTML options, video, images, etc
 5. Display Full Width: Choose whether or not you want the agent contact form to display to the right of the page content
 6. Add this page to my menu: Choose whether or not you want a link to this page added to the end of your menu
 7. Meta Title: The blue title displayed on search engines when this page is found in search results
 8. Meta Description: The gray text displayed below the blue title on search results
 - a. This is not the place to load up tags (i.e. homes for sale houston, houston real estate, houston houses, houston). This is read by actual people when this page displays in search results, and should be a helpful description of what will be found on the page
 9. Click “Save as Draft” if you don’t want this page public yet
 10. Click “Save” to publish the page

Edit an Existing Page

1. At the top, next to “Site Settings”, click “Pages”
2. Click on the name of the page to edit, or “Edit” in the 4th column
3. Make your changes
4. At the bottom, click “Save as Draft” to unpublish the page
5. Click “Save” to update the changes live on the site

Blog Posts

Blog posts are articles that you write to display your expertise as

Create a New Blog Post

1. At the top, next to “Site Settings”, click “Blog Posts”
2. Click the Plus Sign (+)
3. Give your blog post a title
 - a. Shows on the “Blog Index” page before opening the post
4. Add your content
 - a. Minimum 300 words
5. Optional: Excerpt
 - a. Small portion or summary of the text that will display on the “Blog Index” page before opening the post
6. Optional: Featured Image
 - a. Main image that will display on the “Blog Index” page next to the title before opening the post
 - b. If the post is shared on social media, this will be the image
7. Meta Title: The blue title displayed on search engines when this page is found in search results
8. Meta Description: The gray text displayed below the blue title on search results
 - a. This is not the place to load up tags (i.e. homes for sale houston, houston real estate, houston houses, houston). This is read by actual people when this page displays in search results, and should be a helpful description of what will be found on the page
9. Click “Save as Draft” to not make this post public
10. Click “Publish” to make this post public

Edit an Existing Blog Post

1. At the top, next to “Site Settings”, click “Blog Posts”
2. Click on the name of the post, or on “Edit” in the 4th column
3. Make your changes
4. Click “Save as Draft” to unpublish the post

5. Click “Publish” to update the post live

Agents

NOTE: As of 2017-10-16, Placester has moved this feature to be part of an upgrade package, and will not be available on new KW Websites.

This section allows you to create individual pages with biography/contact information for team members, if you are the lead agent on a team

Create a New Agent Page

1. At the top, next to “Site Settings”, click “Agents”
2. Click the Plus Sign (+)
3. Add the agent’s name (this will be the title of the page)
4. Add a description/bio for that agent
5. Optional: Agent’s MLS ID
6. Optional (but recommended): Office location
7. Optional: Office Phone
8. Agent’s Mobile Phone
9. Agent’s Email
10. Agent’s Title within the team (i.e. buyer specialist, listing specialist, etc)
11. “Should this agent be featured” will move this agent to the top of the “Agents Index” page
 - a. By default, sorted alphabetically
 - b. If multiple agents are featured, they will be sorted alphabetically
12. Optional: Add social media links following the instructions in “Social Networks” above
13. Excerpt: Same as for a blog post
14. Featured Image: Same as for a blog post
15. Meta Title: Same as for a blog post
16. Meta Description: Same as for a blog post
17. Click “Save as Draft” to not make this agent page live
18. Click “Save” to publish the agent page

Edit an Existing Agent Page

1. Log in to myKW.kw.com
2. In the top black menu bar, hover over “Technology”
3. Click “KW Websites”
4. Click the red “Go to my website” button in the center of the page
5. On the left, click “Edit Site”
6. At the top, next to “Site Settings”, click “Agents”
7. Click on the name of the agent, or “Edit” in the 4th column
8. Make your changes
9. Click “Save as Draft” to unpublish this agent
10. Click “Save” to update the changes live

Testimonials

Testimonials can be copied from any review/testimonial source, such as Zillow, Realtor.com, Google, Yelp, etc. Clients do not have the ability to add their own testimonials to this site, each testimonial will need to be manually entered by you.

Create a New Testimonial

1. At the top, next to “Site Settings”, click “Testimonials”
2. Click the Plus Sign (+)
3. Give your testimonial a title
 - a. I.e. “Happy Investor” or “Satisfied Seller”, or just the name
4. Type/paste the testimonial
5. Optional: Referrer: Name of person who provided the testimonial
6. Optional: Affiliation: Buyer, seller, vendor, etc
7. “Feature on your homepage?”: Do you want this testimonial to display on your home page?
 - a. Only available for certain themes
8. Excerpt: Same as for blog post

9. Featured Image: Same as for blog post
10. Meta Title: Same as for blog post
11. Meta Description: Same as for blog post
12. Click “Save as Draft” to not publish this testimonial
13. Click “Save” to publish the testimonial onto the site.

Edit an Existing Testimonial

1. At the top, next to “Site Settings”, click “Testimonials”
2. Click the name of the testimonial to edit, or “Edit” in the 4th column
3. Make your changes
4. At the bottom, click “Save as Draft” to unpublish the testimonial
5. Click “Save” to update the testimonial live

Areas

Area pages are similar to the “Communities Served” pages in eEdge. These show your local expertise by providing in-depth information about specific neighborhoods, subdivisions, or cities. They are connected to the IDX feed, and will display listings from that area.

Create a New Area Page

1. At the top, next to “Site Settings”, click “Areas”
2. Click the Plus Sign (+)
3. Give the page a title
4. Type of area
 - a. Region: State or Province
 - b. Locality: City
 - c. Postal: Zip or Postal Code
 - d. Neighborhood: Subdivision, neighborhood, condo, etc
5. Name of area: Choose from MLS-defined names of the type of area selected
 - a. I.e. If “Locality” is the type, “Orlando” for the name

6. Default Sort: For listings shown on that page
7. Should this area be featured?
 - a. Featured areas will be displayed first on the “Areas Index” page
 - b. If multiple areas are featured, they will be sorted alphabetically
8. Slideshow: Upload images for this area to automatically scroll
 - a. No limit on number of images
9. Headline: The area page has up to 3 sections. The headline is the main heading for the whole area page
10. Body Copy: Each of the sections on the page can have their own text, including HTML elements, images, videos, etc
11. Upload File: The first section can display one image across the full width of the page
12. Sub-head: Heading for the 2nd and 3rd sections of the page
13. Upload file (x2): The 2nd and 3rd sections can display one image the full width of the page, or two images half the width of the page
14. Excerpt: Same as for blog post
15. Featured Image: Same as for blog post
16. Meta Title: Same as for blog post
17. Meta Description: Same as for blog post
18. Click “Save as Draft” to not publish this Area
19. Click “Save” to publish the Area onto the site.

Edit an Existing Area Page

1. At the top, next to “Site Settings”, click “Areas”
2. Click on the name of the area to edit, or on “Edit” in the 4th column
3. Make the changes to the page
4. At the bottom, click “Save as Draft” to unpublish the Area
5. Click “Save” to update the Area live

Area Page Template

Find our fill-in-the-blank Area Page template here: <https://drive.google.com/open?id=1fDhldD7Y6SBBDyB9M798C9PnrqmVdXk0nvjznP9Ff3M>

KW Website Powered By Placester F.A.Q.

- My KW Website is not yet available on my account, but I want to know the address to use on marketing materials. What will my site address be?
 - By default, your KW Website address is supposed to be the same as your KW email address, but replacing the “@” symbol with a “.”. I.e. scottleroy@kw.com becomes scottleroy.kw.com
 - NOTE: For Associates in Canada, the site address will end in “.kellerwilliamsrealty.ca” rather than “.kw.com”
 - NOTE: We make no guarantees as to what your site address will be, as we have seen some cases where the site address assigned by default did NOT follow these conventions
 - Dots, dashes, or underscores in the KW email are exceptions:
 - scott.leroy@kw.com becomes scott-leroy.kw.com
 - scott-leroy@kw.com becomes scott-leroy.kw.com
 - scott_leroy@kw.com becomes scott-leroy.kw.com
 - Note that you can follow the instructions in the “Custom Domain” section to edit the part before “.kw.com”, and these guidelines would not apply
 - Please refrain from purchasing any print marketing prior to the domain being established and live.
 - Previous address(es) will not forward to a new address
- Who do I contact about upgrading my Placester website?
 - Please contact Placester directly with any upgrade inquiries: support-kw@placester.com or 800-728-8391
- Why does nothing happen when I click the “Email Me” link on my KW Website?
 - The “Email Me” link will open the default mail program set on each computer that visits the site. If a default mail program has not been set, nothing will happen
- Why does Outlook/Mac Mail/Thunderbird/etc. open when I click the “Email Me” link on my KW Website?
 - See above. This behavior will be different for each and every computer, depending on what the default mail program has been set as
- Is it possible to show my listings on the home page, but then my office’s listings if I don’t have any?
 - Unfortunately no, that is not a possibility at this time. The featured listings section can show *either* your listings *or* your office’s listings
- Why does my “Featured Listings” section show listings from [Insert City Here] which is very far from my actual service area?
 - By default, the “Featured Listings” section will display the highest-priced listings in your entire MLS, which are often in bigger cities. Edit your featured listings filters to update this.
 - If the KWLS is selected as the MLS under “IDX Integration”, it will show the highest listings in the KWLS, which are usually in larger metropolitan areas

- Can I forward my KW Website powered by Placester to another site?
 - Absolutely! Simply add the domain of the other site as the custom domain in the “Custom Domain” section, but don’t complete the steps for changing the DNS settings for the domain. This way, when someone types your “_____.kw.com” address into the address bar, it will redirect over to whatever other site you entered
- Can I add a Facebook/Blog/Twitter/Activerain/etc. widget to my site home page?
 - Unfortunately no. The templates provided by placester are the only way to make changes to the layout/look of the home page
- How do I create a “Landing” or “Squeeze” page on my site?
 - There is no option for a page that only has the option to collect contact information in exchange for something you provide to the visitor (like a home valuation or neighborhood guide) before allowing the visitor to do anything else, without contacting Placester to upgrade. However we have some services available to use Google Forms to accomplish much the same thing. Check out www.ScottLeRoyMarketing.com/Support to find those services.
 - e.g. “What’s my home worth?” Seller evaluation, Testimonial Submission, and Open House Sign In
- Why does “Not secure” show in the address bar for my site? How can I make this go away?
 - This notification only serves as a reminder not to enter any sensitive information, such as credit card or social security numbers, into the site. As of 2017-11-17, there is no way to remove this notification. Direct further inquiries to support-kw@placester.com.
- Why do I receive a “Privacy Error” when I visit my Website with a warning that my information may be stolen?
 - This is because “www” was entered before your website address. Please avoid using www. in the website url. See this page for more information: <http://scottleroymarketing.com/placester-privacy-error>

KW Email

Your KW email is powered by Google's G Suite for Business, and behaves nearly exactly the same as any other Google account. This email is not accessed through mykw.kw.com, but rather directly through Gmail.com just like any other G Suite account. You can add this email address to your phone, set up filters, forward it to another address, etc. exactly as you would with another Google account.

Create Your KW Email

1. Log in to mykw.kw.com
2. In the top, black menu, hover over "Technology"
3. Click "KW Email"
4. On the right, click "Sign Up"
5. Enter your name and the email address you want
 - a. See the list of prohibited words for KW emails here:
http://answers.kw.com/customer/en/portal/articles/2148012-create-your-kw-com-gmail-account?b_id=1286
6. In the dropdown to the right select the "kw.com" option
7. Click "Submit"

Log in to Your KW Email

Note that if you are already logged in to another Gmail account on your browser, you will either need to sign out of that account, or "Add Account" to sign in to your KW email.

1. Go to www.Gmail.com
2. Click "Sign In"
3. Enter your full KW email address including the "@kw.com" section
 - a. Leaving this off will try to log in to a regular gmail address with the same name
4. Enter your password
5. Click "Sign In"

Change Your KW Email Password

1. Log in to mykw.kw.com
2. In the top, black menu, hover over “Technology”
3. Click “KW Email”
4. On the right, click “Manage Your KW Email
5. Scroll to the third section, “New Password”
6. Type in your new password and confirm the password
7. Click “Save”

Create an Email Alias

An email alias is a secondary address that messages sent to will automatically show in the inbox for your main KW email. This does NOT create a new email address that can be logged in to separately, NOR does it change your existing KW email address. Responses to messages sent to an alias will come from your main KW email, not from the alias.

1. Log in to mykw.kw.com
2. In the top, black menu, hover over “Technology”
3. Click “KW Email”
4. On the right, click “Manage Your KW Email”
5. In the first section, “Alias” click “Click here to request a new email alias”
6. In “Select Primary Email” click your existing KW email
7. In the “New Alias” box, enter the new alias you would like to create
8. Click “Submit Alias”

Forward Your KW Email

1. Visit www.Gmail.com
2. Log in with your KW Email and Password
3. At the top right, click the “Settings” gear icon

4. Click “Settings”
5. At the top, click the “Forwarding and POP/IMAP” tab
6. Click the option to add new forwarding address
7. Type in the email address to forward the kw.com email to
8. Click the save/ update option
9. Check the radio button for “Forward a copy of incoming mail to:”
10. Select the email address to forward to
11. Select how you wish for the email to display in the kw.com email inbox upon forwarding
12. At the bottom of the page, click “Save”

Create an Email Signature

1. Go to gmail.com
2. Visit www.Gmail.com
3. Log in with your KW Email and Password
4. At the top right, click the “Settings” gear icon
5. Click “Settings”
6. Scroll down to the “Email Signature” section
7. Click the radio button next to the dropdown with your email address
8. Fill out the email signature field with your desired email signature
 - a. Check out <http://scottleroymarketing.com/templates> for free signature block image templates
 - b. Check out <http://scottleroymarketing.com/email-signature> for Clickable HTML signatures (for a fee)
9. At the bottom of the page, click “Save Changes”

KW Email F.A.Q.

- Can I use my KW Email on my phone?
 - Yes! Your KW email will work on most iOS and Android devices. Add your KW email the same way you would add any other Google account, through your device’s settings, or use the Gmail app to automatically bring over your saved signature
- Why do we have two email addresses?

- Your @kw.com email address is your primary email and should be used for all of your accounts/marketing/communication. The @kwrealty.com address is simply the address that your marketing campaigns come *from*. If your settings are correct, any response to your marketing campaign emails will automatically be forwarded to your KW email, or whatever other email you use for your business
 - See “[Update Information That Auto-Populates on Marketing Materials](#)” for more information
 - See this video for more information: <https://youtu.be/6906js4mmJ8>
- Are we obligated to use our KW email?
 - Not at all. You are welcome to use this email address if you would like to as it is a part of the Keller Williams technology fees, but you are free to use any other address for business. Since it is linked up to the Gmail platform, it will run the exact same as if you were to utilize a @gmail.com account.
- Why do some Google services not work using my KW email?
 - Almost all Google services can be used through your KW email. The full list can be found here: http://answers.kw.com/customer/en/portal/articles/2822714-google-apps-connected-to-the-kw-g-suite?b_id=1286
 - Note that some of the Google apps not accessible through your KW email have to do with money: Adwords, Adsense, Wallet, Play Store, etc. This is because if you leave KW, Google has no way of collecting/paying any outstanding balance.
- Do I receive any extra features with this account?
 - Yes. You receive most of the Google Apps that you would normally receive with a Gmail account (Drive, Docs, Calendar, Voice, etc), along with 30 GB of online storage instead of the normal 15 GB.
- Will I keep the same KW Email address if I transfer to another KW office? What if that office is in another state?
 - Your KW Email address goes with you no matter where you move within the company. Moving offices, changing positions, joining or leaving a team, etc.
- If I leave KW, will I still be able to access my KW email?
 - Your KW Email will remain active for 60 days (not business days) after you are removed from the KW system. You will have that time to save/forward any messages you need, and transfer contacts.

myTransactions (DotLoop)

Dotloop (eTransactions/myTransactions) is the paperless contract-to-close transaction system provided by KW International to KW Associates. This system is how you will fill contracts, have clients sign, and submit paperwork for compliance review to your office. For support in this system, contact Dotloop at 513-257-0558.

Working With Loops

Find myTransactions (DotLoop)

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click “Start my Transaction”

Create a Loop

1. Select the big red + if in the grid view or select the add new loop option at the top right if in the list view

Add a Contact to the Loop

1. Click on the name of the loop
2. Scroll down to the people section
3. Click the “Add Person” button
4. Add the contact’s first name, last name, and email address
 - a. This is the minimum required information
 - b. Additional information is useful to auto-fill information in documents
5. Click “Save”

Add a Template Document to the Loop

1. Open the loop

2. Click “Add Document”
3. Click “Templates”
4. Search the templates for the document(s) you need
5. Check the box to the left hand side of each document to add to the loop
6. Click “Copy”

Add PDF Documents to the Loop

Note: Works best in Google Chrome

1. Open the loop
2. Click “Add Document
3. Click “Browse”
4. Locate your document on your computer
5. Click “Open”

Share Document with Contacts

1. Open a loop
2. Click the name of the document to be shared
3. Click “Share” at the top right
 - a. May say “Save & Share” if edits were recently made
4. In the “Add People” section, add in the people to share, or if they are already in the “People” section of the loop, click on the check box next to their name
 - a. Adding new people here automatically adds them to the “People” section of the loop
5. On the right, choose each person’s share level
 - a. View Only - Can only view, download, or print the document
 - i. Good for additional parties like lenders or title companies
 - b. Can Sign - Can only sign on assigned signature areas
 - i. Usually used for clients

- c. Can Fill & Sign - Can sign on assigned signature areas AND add/edit information in text fields--even overwriting previously entered information
 - i. Be careful. Good for use with tech-savvy clients or partners on the deal
 - d. Can Edit In Private - Can make a copy of this document and add their information/signatures, leaving your original unchanged
 - i. Good for co-brokers who need their clients to sign a document your client has already signed
6. OPTIONAL--Check the "Attach PDF to Email" box to send the dotloop version accessible in a browser, as well as a PDF version for recordkeeping
 7. Click "Share"

Submit Loop for Compliance Review

1. Open a loop
2. In the top right, click "Submit For Review"
 - a. If nothing happens, it's usually because the loop was created before your account was correctly connected to your office, and the Admin account doesn't have access to the loop. You will need to make a new copy of the loop and copy over all of the documents, and submit that copy
3. Select the folder(s) to submit for review
4. Select which type of folder you are submitting
5. Add in comments if necessary
6. Click "Submit"

Submit Loop to a Greensheet

1. Open a loop
2. Click the name of the loop, or "View Details"
3. In the top right, click "Submit to Greensheet"
 - a. If nothing happens, make sure your popup blocker isn't blocking popups from dotloop.com

Auto-populate Loop Templates with Property/Client Information

1. Open a loop
2. Click the name of the loop, or "View Details"
3. Add as much information as you have about the property and clients

4. Click the save option at the very bottom

Download/Print Completed Documents From a Loop

1. Open a loop
2. Click on the document to download/ print
3. In the top menu, hover over “File”
4. Click “Download” or “Print”

Archive (Delete) A Loop

Loops and documents cannot be “deleted” in dotloop, only “Archived” and can always be found and recovered later.

1. Find the loop
2. Below the loop name, Click the first dropdown
 - a. “Select Transaction Type” if nothing has been selected”
3. Click any type
4. Next to that, click the status dropdown
5. Click “Archived”

Archive A Document

1. Open a loop
2. To the right of the document name, click the three horizontal dots
3. Click “Archive”

Find An Archived Loop

1. In the top of the loop list, click “Filter”
2. In the second column, “Loop Statuses”, check “Archived”
3. Click “Filter” at the right
4. Search for the loop in the red search bar

Account Information

Change Dotloop Account Email

1. Hover over your initials/picture in the top right
2. Click “My Account”
3. Update your email address on the right
4. Click “Save” at the very bottom
 - a. You will need to go to that new email address to find a “Verify Your Identity” email from dotloop. Open that email and click the “Verify” button to complete this process

Update Name and Initials in DotLoop

1. Hover over your initials/picture in the top right
2. Click “My Account”
3. Update your name and initials under “ESign Name” and “ESign Initials”
4. Click “Save” at the very bottom

Dotloop/myTransactions F.A.Q.

- Who Can See My Loops?
 - By default, all loops are private between you and your office’s administrator until shared. See “[Add A Contact To The Loop](#)” for information on sharing documents.
- Can I access DotLoop outside of mykw.kw.com?
 - While using the “Start myTransaction” link within mykw is the preferred way to access dotloop, it is not required. Simply visit www.Dotloop.com and sign in with the email address and password for that account. Note that in order to submit a loop to a Greensheet (see “Submit Loop To A Greensheet”), you must also be signed in to mykw.
- Can I access dotloop on my mobile device?
 - Absolutely! The iOS and Android Dotloop apps can do everything the desktop version can do, including, in the iOS app, scanning documents in using the device’s camera. Just visit your app store and search “dotloop” to download, and log in with your email address and password.

Keller Williams APP

Your Keller Williams app is a convenient way for your clients to search for properties, save their favorites, sign up for listing alerts, and contact you. One big note: There is no “agent version” of the app, nor an “agent account” within the app. There is only a client version, that both you and your client install on your phones. Any changes made to the KW App are done through mykw.kw.com, not through logging into your app directly on your phone. You do not have an account within your app by default, you will need to create one, and it will be a client account.

Using Your KW APP

Find the Code/URL For Your Personalized/Branded KW APP

1. Log in to mykw.kw.com
2. In the eEdge Control Panel (near the top center), click the Plus Sign (+) next to “myMarketing”
3. Click “Manage eAgentc Website”
4. On the left, click section 4.0 to expand, then click 4.5
5. Click the Drop Down arrow to select your market center
6. Click “Save” at the bottom

Download Your KW APP (on your smartphone/tablet)

1. Find your app URL from the above steps
2. Type in the app URL in your smartphone’s web browser
3. At the top, click “Download Now”
4. Download the app from the Apple App Store or Google Play Store

Update Your Information Displayed on the KW APP

1. Log in to mykw.kw.com
2. In the eEdge Control Panel (near the top center), click the Plus Sign (+) next to “myMarketing”

3. Click “Manage eAgentc Website”
4. On the left, click section 1.0
5. Click section 1.2
6. Update your contact information or click “Populate From Whitepages” (See [“KW Profile”](#))
 - a. Not that it can take up to 72 hours for these changes to update within the APP

Brand Your KW APP

Only necessary if you or your client has already downloaded the plain KW app without branding

1. Open the KW App
2. On the home page, tap “Agent Search” on the right
 - a. Magnifying glass icon with person silhouette
3. Search your first and last name, and office zip code
4. On search results (there should be only 1) tap yourself
5. On your app profile, tap the red switch under “Make This My Agent”
 - a. The switch will turn green, and the app will restart with your information

Alternatively:

1. Open the KW App
2. Tap on the menu in the top left
 - a. Three horizontal white bars
3. Tap “My Agent”
 - a. A box will pop up asking for an agent code
4. Enter your Agent Code
5. Tap “OK”

Share Your KW APP

1. Open the KW App
2. Make sure your app is already branded with your information
 - a. Should display your name at the very bottom of the app home page
3. On the home page, tap “Share” at the bottom center

- a. Three circles connected by two lines
4. Choose which method to share by
 - a. Facebook, Twitter, E-Mail, Text
5. Enter the contact information for the person/people you are sharing the app with
 - a. Optional: Add a customized message
6. Click “Send”

See How Many People Have Downloaded Your KW APP

Note: There is no way to see who has simply downloaded your app. The only way to receive any information from app users is if they create an account, save a property, or use the “Contact Agent” function.

1. Log in to mykw.kw.com
2. Near your picture in the top left, click “Reports”
3. Hover over “Reports”
4. Hover over “Rankings”
5. Click “Agent Mobile Downloads”
 - a. Your number of app downloads will be listed at the top, with a ranking of all KW agents following

See Who Has Created an Account/Saved Properties in Your KW APP

Note: This requires for the Wolfnet IDX solution to be set up. See [“What Is IDX?”](#)

1. Log in to mykw.kw.com
2. Next to your picture in the top left, click “Profile”
3. In the “My Leads” column, click the red “[edit]” link
4. On the left, click section 4.0 to expand it
5. Click section 4.4
6. Click “Login”
7. Enter the username and password provided to you by Wolfnet, and select your MLS board
8. Click “Login”

About the KW APP

Information Found On The App Page

Mobile URL

Used to direct mobile and non-mobile users to download your KW APP

- On mobile, will open their app store where they can download the KW APP already branded with your information

Mobile Text Code

You/clients can text this code to the number 87778 to receive the APP URL to download your app

My Agent Code

Used for those who have downloaded the plain KW app and need to sync the app with your branding

- See [“Brand Your KW App”](#)

QR Code

A “Quick Response” code that can be added to marketing materials to be scanned using a smartphone app, which will direct the user to the Mobile URL page

Mobile App Service Area

By default/if left blank, the city in which your market center is located will display on the homepage of the APP. Add a different area you service instead of the market center city and state (ex: “Greater Orlando Area” vs default “Orlando, FL”) in this box. Up to 40 characters.

KW APP F.A.Q.

- When I tap “Email” under “Contact Agent”, the email address displayed is my personal email, not my business email. How can I change this?

- The email address displayed on this form is the address that the message sent to the agent will come *from*, and is the default email address on your phone. This email address will be the personal email address of whoever is using the APP to contact the agent. See this video for more information: <https://youtu.be/gttXG3j0uIY>
- Why isn't my listing showing on the KW APP?
 - Most likely, it just hasn't syndicated through yet, which can take up to 72 hours after it is entered into the MLS
 - Another reason may be that the IDX Connection to your APP hasn't yet been set up. See "[What Is IDX?](#)" under "KW Website Powered By Placester"
 - Lastly, contact KW International support at support@kw.com or (512) 306-7191
- Can I change my KW APP code/URL to something more user-friendly?
 - This used to be a feature for Wolfnet Pro users, but it has been discontinued
- My app is branded to another KW Agent. How do I re-brand the app with my information?
 - From the APP home page, open the menu
 - Tap "My Account"
 - At the very bottom tap REALTOR Login
 - Log in using your mykw username and password
- I transferred KW Offices, and my app still displays the old office's city at the bottom. How do I update this?
 - When transferring KW Offices, an agent gets a new app in the new office. To re-brand the app with the correct office information:
 - From the APP home page, open the menu
 - Tap "My Account"
 - At the bottom, tap "Agent Search"
 - Follow the steps in "[Brand Your KW APP](#)"

eEdge Database/myContacts

myContacts, powered by eEdge, is the KW Agent's "database". This is where agents will enter everyone they know or interact with, to be able to follow up with them, record notes, and send them listing alerts or campaign emails. A few notes:

- A maximum of 15,000 contacts are allowed in the basic eEdge database
- A maximum of 5,000 messages per month are allowed to be sent in the basic eEdge database
 - A maximum of 2,000 messages can be sent in one day in the basic eEdge database
- Importing contacts who have not opted in to receive emails from you is strictly prohibited and could result in deactivation of your account
 - I.e. from Facebook, which is impossible as of August 2018. Facebook has prevented any kind of export of your friends list in order protect users from receiving emails that they never signed up for, even if they have already connected with you.

Manage Contacts

Find All Contacts

1. Log in to mykw.kw.com
2. In the eEdge Control Panel (near the top center), click "View Contacts"

Add a Contact

1. In the top gray menu click "Contacts"
2. Click "Create Contact"
3. Add all information on the contact
 - a. Minimum requirements: First AND last name, AND EITHER email address, mailing address, or phone number
4. Click the "Save" button at the bottom

Search for Contacts

1. At the top of the contact list, click "Filters"
2. Add your search criteria

3. Click orange “Search” button in the top right
4. Click the “Clear Filters” link in the top right to display all contacts again
5. Click “Save Search” if you perform this search often to find it under the “My Searches” dropdown

Search Criteria/Parameters

- Name: Full or Partial Name
- Phone: Any phone saved in the contact (each contact can have up to 3)
 - Exists: Whether or not the contact[s] you are looking for have a phone number
- Email: Any email in the contact record (each contact can have up to 3)
- Mailing Address: The address within a contact marked as “Mailing Address”
 - Exists: Whether or not the contact[s] you are looking for have a mailing address
- Status
 - Any Active (Anything but “Trash”)
 - Lead
 - Hot
 - Warm
 - Cold
 - Retry
 - Pending
 - Sold
 - Trash
- Category: User-defined, can be anything
- Referral Info: User-defined, can be anything
- Comments/History: Search the “Comments/Notes/History” field
- Open Follow-up Requests: Whether the contact has a notification for the agent to complete a CMA or Showing
- Groups
 - Select existing group(s) in dropdown
- Has a Saved Listing Search: Whether a contact is receiving a listing alert
 - No Preference: don’t care whether a contact is receiving listing alerts or not
 - Not Saved

- Yes - No Alert
- Yes - With Alert
- On Active Campaign: Whether a contact is receiving campaign emails
 - No preference: Don't care whether contact is on a campaign or not
 - No: Not on any active campaigns
 - No - Completed: Was previously on a campaign, but that campaign has ended
 - Yes: Is currently on a campaign
- Type
 - Buyer
 - Seller
 - Buyer/Seller
 - Agent
 - Renter
 - Investor
 - Vendor
 - Personal Contact
 - Other
- Sub-type
 - Sub types are set by agents and can be used to delimit different kinds of the primary types
 - I.e. Type: Buyer, Sub-type: In 3/6/9 Months
- Looking in
 - What city are they looking for homes in
- Budget: Price range
- Contact Created
 - Range "From mm/dd/yyyy" - "To mm/dd/yyyy" of when they were added to the database or created their account on eEdge Website
- Last Contact Outreach
 - Range "From mm/dd/yyyy" - "To mm/dd/yyyy" of the last time the contact was reached out to
- Contact Last Active
 - Range "From mm/dd/yyyy" - "To mm/dd/yyyy" of last time they logged in to their account

Change Contact Status

1. Find the contact from the list
2. Select a new status under the “Status” column
 - a. Changes are automatically saved

Update Contact Information After Adding Contact

1. Find the contact to update
2. Click on contact’s name
3. Click the “Edit” button at the top left
4. Edit their information
5. Click the “Save” button

Delete Contact

1. Click the checkbox to the left of the name of the contact you wish to delete
2. Click the “Bulk Update” button that appears at the top of the list
3. Choose “Send these Contacts to the trash”
4. Click the “Permanently delete the contacts” checkbox that appears underneath
5. Click “Trash Now”

Add Contact to Listing Alert

1. Find the contact to set up on a listing alert
2. Click on their name
3. Click “More Actions” to the far right of their name
4. Click “Add New Listing Alert”
5. Add the information for the contacts listing alert information (bed, bath, price range, area, etc)
6. Click the “Add Alert” button

Change Sorting of Contacts in myContacts List

1. Choose the column to sort by in the “Sorted by:” dropdown above the list

Working With Groups

Add/Create a Group

1. Click "Contacts" in the gray bar at the top
2. Click "Manage Groups"
3. In the "Create New Groups:" box in the top right, type in the name of the group you would like to add
4. Click the "Save" button

Edit a group name

1. Click "Contacts" in the gray bar at the top
2. Click Manage Groups
3. Click the pencil icon to the right of the group name you wish to change
4. Enter a new group name
5. Click the "Save" button

Add a Contact to a Group

1. Select the check box to the left hand side of the contact(s) you wish to add to the group (can only add 500 contacts to a group at a time)
2. Above the contact list, below search, click "Bulk Update"
3. Choose "Edit the records"
4. Click "Continue"
5. Check the box for "Groups or Campaigns"
6. In the dropdown, select "Add to Groups:"
7. Check the box(es) for the group(s) you want to add the contact(s) to

8. Click the red “Update Now” button at the bottom

Remove a Contact from a Group

1. Select the check box to the left hand side of the contact(s) you wish to add to the group (can only add 500 contacts to a group at a time)
2. Above the contact list, below search, click “Update Contacts”
3. Make sure “Edit the records” is selected
4. Click “Continue”
5. Check the box for “Groups or Campaigns”
6. In the dropdown, select “Remove from Groups:”
7. Check the box(es) for the group(s) you want to remove the contact(s) from
8. Click the red “Update Now” button at the bottom

View only the contacts in a specific group

1. Click “Contacts” in the gray bar at the top
2. Click Manage Groups
3. Click the blue number to the right of the group name

Automatically add to groups based on contact type

New contacts (whether entered individually or imported) can automatically be added to groups by assigning a certain contact type. I.e. “Buyer” type can automatically be added to a “Buyer” group.

1. Click “Contacts” in the gray bar at the top
2. Click Manage Groups
3. Under “Contact Types” next to any group, click “Add”
4. Check the box for the contact type(s) you want to be automatically added to this group
5. Click “Save”
6. To add/remove types to/from a group, click on the name(s) of the contact type(s) assigned to that group and uncheck the boxes

Assign a Campaign to a Group

Assigning a campaign to a group means that any new contacts added to that group will automatically start receiving a particular campaign(s)

1. Click "Contacts" in the gray bar at the top
2. Click Manage Groups
3. To the right of the group you want, click "Add" under "Associated Campaigns"
 - a. NOTE: The campaign must have previously been created. See "[Marketing Campaigns](#)" for more information.
4. Check the box(es) for the campaign(s) you want contacts to automatically be added to when added to this group
 - a. NOTE: Only campaigns with the status "Active" will actually send any emails. "Paused" or "Inactive" will not.
5. Click "Save" at the bottom right

Import/Export Contacts

KW Agents can import contacts from nearly any source into eEdge, once they have copied/pasted the information to a template provided by Market Leader. Note: There is a maximum of 5,000 contacts per upload/import, with a total maximum in the database of 15,000 contacts. Minimum import requirements are: First AND last name, AND EITHER email address, mailing address, or a phone number.

Import Contacts

1. Click "Contacts" in the gray bar at the top
2. Click "Import/ Export"
3. Select the file type to import (basic template is the main format. Download that template to upload the contacts at the bottom of that column)
4. Select the status, group and type
5. Attach the CSV file
6. Check the box for "I Agree..."
7. Click the red "Import" button
 - a. Depending on the size of your file, the import process can take anywhere from 5-30 minutes. Refresh the page to see status updates on your import.
 - b. After the import is finished, to see any contacts that were not imported and why, click the blue number under "Failed"

Export Contacts

1. Click "Contacts" in the gray bar at the top
2. Click "Import/ Export"
3. Click the "Export" tab
4. Check the box(es) the group(s) and status(es) to export
5. Click "Export"
 - a. A .csv file will download (editable in Excel) of your contacts

Integrate other lead sources

eEdge can connect with several other lead sources such as Zillow/Trulia, Realtor.com, etc. Here is how to find instructions for each of those connections:

1. In the top right, click "Account"
2. Click "Integrations"
3. Follow the instructions linked next to each lead source

myLeads

myLeads are the culmination of new leads to your Placester Website, eEdge website, KW Profile or the KW APP. These are new contacts that have sent their information to you directly whether they created an account to view listings, or would like more information on a particular listing.

Find myLeads

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click “New Leads” under the “myLeads” section

Change Lead Status

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click “New Leads” under the “myLeads” section
3. Find the contact whose status you want to update
4. Click on the drop down that displays the word “Lead” (in the “Status” column”
5. Select a different status to update
6. Refresh the page
 - a. Changes will save automatically

Move a Previously Added Contact to the myLeads section

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click “View Contacts”
3. Find the contact to update
4. To the right of the contact name, click the “Status” dropdown
5. Click the “Lead” option
 - a. Changes will automatically save

Receive Text or Email Alerts on New Leads

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click "View Contacts"
3. In the top right, click "Account"
4. Click "My Account"
5. On the left, click "Activity Alerts"
6. At the bottom, click the red "Edit" button
7. Add in your cell phone number and/ or email address
 - a. If entering a cell phone number, choose your cell carrier
8. Check the boxes for whether you want to receive text notifications, email notifications, or both, for each type of activity
9. Click the "Save" button

Activity Types for Notifications

- New Contact
 - From any source
- Contact Updated Information
 - If a contact logs into their account and changes their information
- New Message From Contact
 - You receive a message from a contact already in your database
- New Message From Non-Contact
 - You Receive a message from a contact not already in your database
 - Can/will notify you of spam messages. Be alert to scams
- New Recommendation On Website
 - You receive a recommendation/testimonial on your eEdge website

myLeads F.A.Q.

- Will Leads Only Go to the myLeads Section?
 - Not at all. The myLeads section is meant for you to see new leads immediately. They will also be located in the myContacts section with the rest of your database.

myMarketing

eEdge has a large selection of marketing materials for your business and your listings. From listing presentations to helpful tips to open house flyers, you should be able to make most of your marketing materials within eEdge. All Marketing pieces are free to create as an associate of Keller Williams. All emails are free to send, but direct mail pieces will cost you to send out if you choose to do so through the eEdge system.

For additional free templates, including email signatures and Facebook covers, visit <http://scottleroymarketing.com/templates>

Single Marketing Materials

Find Marketing Materials

1. Log into mykw.kw.com
2. In the eEdge control panel, click the Plus Sign (+) next to “myMarketing”
3. Click “Create Marketing Materials”

Create a Marketing Piece

1. On the left, click either “Email Marketing” or “Print Marketing”
2. Use the filters and search box on the left to find a template
3. Click on the image of the piece
4. Click the red “Personalize” button
5. Make your changes
 - a. Add/change/remove/rearrange pictures and text

6. Click the “Save” button in the top left corner
7. Enter a name for the file
8. Click the "Save" button
9. Click “Exit” in the top left corner

Find Saved Designs

1. On the left, click “My Designs”
 - a. Alternatively, click “Marketing” in the top menu and click “My Designs”

Marketing Campaigns

Create an Email Marketing Campaign

1. Log into mykw.kw.com
2. In the eEdge control panel, click the Plus Sign (+) next to “myMarketing”
3. Click “Manage and Create Campaigns”
4. Click the red “Add New Campaign” button at the top right
5. Use the filters and search box on the left to find the campaign you want
6. Click the red “Choose This Template” button
7. In section 1, give the campaign a name
 - a. e.g. “12 Direct for SOI 2017”
8. In Section 2 “Review and Configure Steps”, depending on the campaign, edit the schedule, email subjects, ordering, or remove steps
9. To preview any of the steps, click on the thumbnail image
10. To edit any of the steps, click the red “Personalize” button
 - a. See steps 9-12 under “Create Marketing Materials”
11. In Section 3 “Add or Remove Contacts”, choose who will receive this campaign
 - a. Individual contacts, specific group or groups, or all contacts in the database
 - i. To send this campaign to a specific group/groups, click the red “Add” button next to the group name(s)
 1. Any new contacts added to this/these group/groups will automatically be added to this campaign as long as it runs
 - ii. To send this campaign to specific contacts, click the “Contacts” tab at the top

- iii. Use the filters/search box to find the contacts and click the red “Add” button for the contact(s)
12. Click the red “Save Changes” button
13. In section 4, “Review and Activate”
 - a. Choose another existing contact for contacts to be automatically added to after finishing this template in the first dropdown (“Monthly Newsletter” by default, can be set to “None Selected”)
 - b. Read the statement and check the box for “I have reviewed...”
 - c. (Optional) Check the box to include showcase properties at the bottom of each campaign email
 - d. Click the red “Activate Campaign” button
 - i. “I have reviewed...” must be checked for this button to be active.

View Saved Campaigns

1. Log into mykw.kw.com
2. In the eEdge control panel, click the Plus Sign (+) next to “myMarketing”
3. Click “Manage and Create Campaigns”
4. This page lists all campaigns active, completed, new/paused, or inactive
 - a. Use the “Show” dropdowns in the top left to select which statuses or types of campaigns to display

Additional Marketing

Send Marketing Piece as an Email

1. Log into mykw.kw.com
2. In the eEdge control panel, click the Plus Sign (+) next to “myMarketing”
3. Click “Create Marketing Materials”
4. On the left, click “Email Marketing”
5. Use the filters and search box on the left to find a template
6. Click on the image of the piece
7. Click the red “Personalize” button
8. Make your changes
 - a. Add/change/remove/rearrange pictures and text

9. Click the “Save” button in the top left corner
10. Enter a name for the file
11. Click the "Save" button
12. Click “Exit” in the top left corner
13. Click the red “Compose Email” button
 - a. Refer to [“Send an Email From myEmail”](#) for information about selecting recipients

Update Information that Auto-populates on Marketing Material

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click “View Contacts”
3. In the top right, click “Account”
4. Click “My Account”
5. Click the red “Edit” button
6. Edit your information
 - a. Name (Your first and last name)
 - b. Login (leave this alone)
 - c. Designations (i.e. CISP, ABR, etc)
 - d. External email (for replies to your campaign emails to be automatically forwarded to)
 - e. Title (Realtor Associate, Broker, Team Leader, etc)
 - f. License/DRE (State real estate license number [if your state requires])
 - g. Team (Check if you are a member of a team)
 - h. Phone Numbers (Business [Briefcase Icon] displays ABOVE Mobile [Cell Phone Icon] on marketing pieces)
 - i. Marketing and Reply To Email (Choose the external email previously entered in this dropdown)
 - j. Call to action (Encourage recipients to actually do something with what you are sending them. Ask for the business)
 - i. i.e. “Are you ready to buy or sell your next home? Give me a call today at (###) ###-####!”
 - k. Branded disclaimer (leave this alone)
 - l. Marketing Address (The address of your office)
 - m. My Mobile App (See “Find the code/URL for your personalized/branded KW APP” for the link to paste here)
 - n. Marketing Website (the link to the site you want to display in your marketing materials, if something besides the eEdge website)
 - i. We encourage using your Placester “_____.kw.com” address here

- o. Unbranded disclaimer (Leave this alone)
- p. Check to display (Leave these alone, required by law)
- 7. Scroll down or up to click the "Save" button
- 8. Scroll to the very bottom to add in your headshot and logo under the marketing image/ marketing logo section
 - a. Click the red "Edit" button
 - b. Click "Choose File"
 - i. Must be in .jpg format
 - c. Click the red "Upload" button

Add Social Media Links to Marketing Emails

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click "View Contacts"
3. In the top right, click "Account"
4. Click "My Account"
5. Scroll down to the social media section
6. Click the red "Add Social Media" button
7. Choose the site in the first dropdown
8. Paste your social media profile link in the box
9. Click the "Save" button
10. Repeat 6-9 for each additional social media profile
11. Click the Pencil icon to edit social media links
12. Click the white "X" in the blue circle to remove social media links

myMarketing F.A.Q.

- Can Contacts Unsubscribe From Email Marketing?
 - Yes. Each email message will feature a safe unsubscribe option for the contacts to unsubscribe. If they have unsubscribed from emails, a mail icon with an x will be located next to their name in the myContacts section. If they unsubscribe this will only take them off of the email campaigns. You can still email them individually.

KW (Whitepages/myReferrals) Profile

Your Whitepages/myReferrals profile is both your public agent profile on the kw.com site, as well as your internal profile for KW agents to search for an agent to send a referral to outside their service area. Keep in mind that it is very unlikely that this information will be seen more than a handful of times over your career, so it is not crucial to make sure it is absolutely perfect. An accurate phone number and email address is all that is really needed.

Find the KW Profile

1. Log in to mykw.kw.com
2. Near the top left, click the “Profile” link next to “Reports”

Bring Your Profile Completeness to 97% (The new 100%)

As of 2018 08 01 KWRI has made changes to the whitepages profile such that the maximum completion percentage is 97%.

- Designations
 - REALTOR®, CRS, CIPS, BRE, GRE, etc
- Service Areas
 - Click the “Add Service Areas” link and enter areas one by one
 - Note that clicking this link will redirect you away from this page, so save your changes first, or use CTRL/Command + Click to open it in a new browser tab
 - Regions like “San Antonio Metro”, or specific cities like “Houston”, “Mesa,” etc.
- Languages
 - English is selected by default. Hold the CTRL (Command, on Mac) key and click other languages to select more than one.
- Headshot
- Name
- Username

- Address
 - Do NOT use your home address, this will display publicly. Use your office address
- City
- State
- Zip
- Business Phone
- Mobile Phone
- Mobile Carrier
 - Must be validated using a keyword texted to you from KW Leads
 - This will only text you when someone fills out the contact form on your public profile
- Country
- Gender
- Salutation
- Bio
 - See here for biography tips: <https://docs.google.com/document/d/1hKTVjJpQUCYTg7K6ziEvAxdG21Umx7BeAopkuiYn4tl/edit?usp=sharing>
- Display URL (not required, but HIGHLY RECOMMENDED)
- Facebook
 - Read the instructions underneath this box to see that it only requires PART of the URL, not the entire “http://facebook.com/...”
- Twitter
 - Same instructions as facebook
- Blog
 - Full blog site address, including “http://” e.g. http://blog.kw.com
- “Display Profile on kw.com” set to “Yes”
- Make sure to click “Save” at the bottom!

Whitepages F.A.Q.

- Where does this information display?
 - This information will display on your agent profile on the main KW.com site, as well as the internal mykw.kw.com whitepages where KW agents can search for a referral. Not all information you input will display on the internet. To see the items that will display on the internet, please use your display url to view your public profile (e.g. http://kw.com/agent/[display-url]).

- Where do I change the website that the “Go to my website” link on my public profile directs to?
 - This is changed in the legacy/retired eAgentC site administration:
 - Log in to mykw.kw.com
 - In the eEdge Control Panel, click the Plus Sign (+) Next to “myMarketing”
 - Click “Manage eAgentC Site”
 - On the left, click section 2.0
 - Click section 2.4
 - Under the “Hosting” section, make sure the radio button for “Alternate” (to the right of “eAgentC Template”) is selected under “Website to Display”
 - Enter the full website address in the “Alternate Website” box, including “http://”
 - At the bottom of the page, click “Save”
- Can I change the order of the service areas listed at the bottom of my public profile?
 - No, the system sorts them in its own way. It doesn’t have anything to do with length, alphabetical, or order in which they were entered.
- Why are the service areas on my profile in all lowercase, when I entered them with capitals?
 - The system automatically changes service areas to all lowercase
- How do I search for a KW agent to send a referral to?
 - See the [“KW Connect Referrals”](#) section

myKW Home Page Menu

The myKW Home Page Menu is the black menu bar that is shown at the top of your mykw.kw.com home page when you first log in. This menu allows you to navigate through your myKW back office with links to different resources.

myKW Logo

By clicking on the myKW logo in the top left hand corner, you can quickly be brought back to your mykw.kw.com home page.

Home

1. Welcome New Associates – This tab is for agents who are new to KW. It provides a checklist of what should be done during your first 100 days as a KW associate, as well as resources for getting started.
2. Agent Website Admin – This takes you to the editor for the retired eAgentC Website, now only used to update the information shown on the KW APP. See [“Update Your Information Displayed On The KW APP”](#)
3. KW Commercial – Provides information about KW’s commercial division.
4. KW GPS – This page is only available to agents who are part of the Global Property Specialist division.
5. KW Luxury Homes – Provides information about KW’s luxury division.
6. Farm and Ranch – Provides information about KW’s farm and ranch division.
7. KW Worldwide – Provides information about KW’s worldwide division.
8. KW Cares - Provides information about KW Cares which is the nonprofit created to help KW Associates, their families, and communities in the wake of disaster--whether personal or natural
9. KW Young Professionals – Provides information about the Keller Williams Young Professionals Division, which prepares the future leaders of Keller Williams to carry forth our company mission while preserving and strengthening our unique culture.

Education

Links to KWConnect.com, KW International’s learning resource where Associates can find everything from listing presentation templates to scripts used every day by mega agents to instructional videos.

KW Maps Coaching

Links to the page within KWConnect.com with information about the different programs available for Maps Coaching: Mastery, Bold, Group, Mega Agent Expansion, Mega Camp, Masterminds, Coaching Skills Camp, and Recharge.

Marketing

Links to the page within KWConnect.com where associates can find Logos and Branding, templates, KW Red Label clothing and social media resources.

Technology

1. eEdge Resources – Provides you with information and training for the eEdge system.
2. KW Mobile App Resources – Prompts you to download the KW Realty app, and provides you with app training.
3. KW Websites – Provides you with information and access to the new KW Agent Website, powered by Placester.
4. KWLS – Allows you to add new, and manage current listings, on the Keller Williams Listing System.
5. Greensheet – Allows you to access and complete Greensheets for your transactions.
6. KW Email – Allows you to sign up for and manage your KW.com email account.
7. Change Password – Allows you to change your password for mykw.kw.com.
8. Support and Answers – Takes you to the Keller Williams Support Center, which provides you with assistance on a variety of KW technology topics.
9. Goal Entry – Allows you to track your business goals.
10. KW Google Apps Resources – Provides you with information about the different Google Apps that KW gives you to support your business.
11. KW Video – Provides you with information about KW Video (A paid service)

Resources

1. Awards Policy – Provides a breakdown of the Keller Williams International Awards Policy.
2. Culture – Provides information about the Keller Williams Culture.
3. IALC and PG Manual – Provides agents with information about the International Associate Leadership Council as well as the KW Policies and Guidelines Manual.
4. Remembrance List – Allows agents and leadership to submit/read remembrance requests, as part of the KW Culture.

5. KW Wellness – Provides agents and leadership with an all-encompassing wellness plan, in hopes of helping them build careers worth having, businesses worth owning, and lives worth living.
6. Profit Share 1099s/T4A – Provides agents with a 1099/T4A record for any income from Profit Share for tax purposes, if applicable.
7. 411 Tools – Provides agents with the 411 productivity tool, which reflects your top priorities and allows you to define your weekly, monthly, and annual goals.

Events

Links to the page within KWConnect.com with information on the events that define KW: Family Reunion, Mega Camp, Masterminds sessions, Luxury Retreat, Red Day, events at KWRI in Austin, BOLD, the KWConnect Calendar, and Recharge

Search Bar

Allows you to search for anything in the entire mykw.kw.com site (excluding eEdge, eAgentC, dotloop, and KW website)

Keller Williams Listing Service (KWLS)

The Keller Williams Listing Service (KWLS from now on) is the system that syndicates your listings to 750+ advertising sites, including Zillow, Trulia, and Homes.com.

If everything is set up correctly, the KWLS is nearly maintenance-free, as it will automatically bring in your listings from your Local MLS, and then syndicate them out, without you having to do anything.

However if your Market Center does not have the ListHub connector (Ask your MCA about this) listings will need to be manually entered both into the MLS and into the KWLS for full syndication.

The Greensheets system also looks to listings in the KWLS when it is time for closing and commissions.

ListHub Connection

Here is how to A) See if your Market Center does have the ListHub Connector and B) Enable it to automatically bring your listings in from your local MLS:

1. Log in to mykw.kw.com
2. In the top black menu, hover over “Technology”
3. Click “KWLS”
4. In the new window that opens, look for the “Single Point Of Entry” section, near the bottom
5. If a checkbox appears under “ListHub Enabled”, your Market Center does have the ListHub Connector
 - a. Check this box and leave it checked to enable the KWLS to automatically bring in your listings from the MLS in order to syndicate them
6. If no checkbox appears under “ListHub Enabled”, your Market Center does NOT have the ListHub Connector

Creating a new KWLS listing manually

From within the KWLS:

1. If your Market Center uses ListHub, you will need to uncheck the "ListHub Enabled" checkbox before you can create a listing manually in the KWLS. If not, then you can skip this step.
2. At the top, click "Create a listing +"
3. Enter all required information (marked with a red Asterisk *)
 - a. House Number
 - b. Street Name
 - c. City
 - d. State/Province
 - e. Zip/Postal
 - f. List Price
 - g. Listing Status
 - h. Market Center (Should be your Market Center by default)
 - i. Property Type
4. Enter any additional/optional information
5. Scroll to the bottom and click "Next"
6. Enter an MLS number/ID for the listing
 - a. *Note: If you do not have the MLS number yet, you can create a placeholder MLS number.
7. Click "Save"
8. Upload your images for the listing
9. Scroll to the bottom and click "Submit for review"

Editing an existing KWLS Listing

From within the KWLS:

1. If your Market Center has the ListHub Connector, ensure the "ListHub Enabled" checkbox is UN-checked prior to editing a listing
2. Near the top of the KWLS click "Accepted" or "All" to see a list of your listings
3. If you clicked "All" click the "Listing Status" header to sort for "Active" at the top
4. On the far left, click the MLS ID for the listing
5. Scroll to the bottom and click the green "Edit" button
6. Make any changes
 - a. Price, status, etc

7. Click the “Lock field” button next to any field you don’t want automatically updated to match information in the MLS
8. Scroll down and click “Save”
9. At the top left click “Dashboard”
10. RE-check the “ListHub Enabled” box so that your listing gets syndicated properly

Editing images in an existing KWLS Listing

From within the KWLS:

1. If your Market Center has the ListHub Connector, ensure the “ListHub Enabled” checkbox is UN-checked prior to editing a listing
2. Near the top of the KWLS click “Accepted” or “All” to see a list of your listings
3. If you clicked “All” click the “Listing Status” header to sort for “Active” at the top
4. On the far left, click the MLS ID for the listing
5. Near the top right, click “Images” in the section with a red background
6. Near the top check the box for “Add additional images”
7. Scroll down and click “Save”
8. At the top left click “Dashboard”
9. RE-check the “ListHub Enabled” box so that your listing gets syndicated properly

Adding an Open House to a listing in the KWLS

Some MLS systems are able to automatically send Open House information to the KWLS, so first check the day after adding the Open House to the MLS to see if it has automatically come over. If not:

1. Near the top, click “Active” or “All” to view a list of your listings
2. On the left, click the MLS ID for the listing you are adding an open house for
3. Near the top right, in the red section, click “Open Houses”
4. Next to “Show date:” click the calendar icon that looks like a box with a grid inside
5. Select the date of the open house
6. Next to “Start Time:” select the time that the open house begins
7. Next to “End Time:” select the time that the open house finishes
8. On the right, click the blue “Add” button

Note that just like any other changes in the KWLS, open houses will syndicate overnight and may not show on Zillow/Trulia/KW App until the next day

KWLS F.A.Q.

- I have checked the “ListHub Enabled” box, why aren’t my listings coming over?
 - The KWLS updates overnight, at roughly 2:00 am Central time. If you added your listing today, it would not go into the KWLS to be syndicated out until tonight.
 - If longer than 24 hours has passed, ask your MCA to ensure that your correct MLS ID has been added to the KW Whitepages.
- Why does the expiration date in the KWLS not match the expiration date in the MLS?
 - See this answer from answers.kw.com:
If a listing is in active status (not pending, contingent, under contract, etc.), and syndicating out from your MLS into your KWLS, and if your ListHub Enabled box is checked, then the expiration date for that listing will always be 14 days past the current date. Regardless of the actual expiration date in the MLS, the KWLS will display an expiration date 14 days in the future. This means that the agents will not need to change these dates in the KWLS because they will always update as long as an active feed is coming over. The expiration dates themselves are not important because they are not published on the websites.

The expiration date will automatically update by one day each time the new feed comes over from the MLS (Every day), keeping the expiration date 14 days past the current date. Once the listing status is changed in the MLS (the listing is sold, expired, or put into pending status) then the feed to the KWLS will stop and the expiration date will stay on the date it is on when the feed stops. The listing will then have a 14-day window in the KWLS before it expires there. Once the listing is expired in the KWLS, it will no longer syndicate to the publisher sites like Zillow, Trulia, etc.

The expiration date in the KWLS is an excellent place to check if the active feed from the MLS is still pulling into the KWLS each day. If you notice that the expiration date has stopped updating, then the listing status in the MLS has changed or something else is interfering with the feed coming over. If you notice this, you can double-check the other areas of your KWLS to ensure the ListHub Enabled check box is checked and your Market Center still has an active ListHub KW Connector account. When everything else is checked and turned on, you can contact the Support Team at support@kw.com or call 512-306-7191, and they will be able to investigate the matter further to see why the listing feed from the MLS stopped.

- My Market Center has the ListHub Connector and I just added my listing to the MLS. Why don’t I see it in the KWLS/Zillow/Trulia/Homes.com/etc?
 - The KWLS updates overnight, at roughly 2:00 am Central time. If you added your listing today, it would not go into the KWLS to be syndicated out until tonight. You should see the listing by the next day.
 - The same applies for listings manually added to the KWLS. They would not syndicate until the next day.

- It's been over 24 hours and my listing in the MLS still hasn't come over to the KWLS or been syndicated. What do I do?
 - Ensure that the "ListHub Enabled" box is checked on the KWLS Dashboard/Home Page
 - Ask your MCA to ensure that your correct MLS ID has been added to the KW Whitepages
 - Ensure that the email address listed in eAgentC section 1.2 matches the email address you use to log in to your Zillow/Trulia agent account:
 - In the eEdge Control Panel on the MyKW home page, click the Plus Sign (+) next to "MyMarketing"
 - Click "Manage eAgentC Website"
 - On the left, expand section 1.0
 - Click section 1.2
 - Confirm that the email address listed matches the email address used to sign in to Zillow/Trulia for your agent account
 - See this video for more information: https://youtu.be/-CoQhUV9_oI
- I am the co-listing agent on a listing, why does the listing not show in my KWLS system?
 - The KWLS only looks at/brings over any particular listing one time, for the primary listing agent.
- I am the co-listing agent on a listing, can I manually add the listing to my KWLS?
 - Unfortunately not. Either the ListHub Connector will bring the listing over from the MLS for the primary agent, or the primary agent must add the listing to the KWLS.
 - If you were to manually enter the listing into your KWLS system, the primary agent would not be able to.
- For more information about using the KWLS, visit KW International's knowledge base at [Answers.KW.com](https://www.answers.kw.com) and search "KWLS"

Greensheets

[Coming soon]

KW Connect Referrals

At Family Reunion 2018 the new Referrals section of KWConnect.com was unveiled to KW Associates as a simple means to send and receive referrals to other KW Associates. Associates can search for and add other associates to their referral network according to sales units, geographic area, and more.

Accessing the Referrals system

1. Log in to mykw.kw.com
2. Just below your picture near the top left, click the red button for “My Referrals”

Sending a Referral

1. In the “My Referrals” interface, click either of the red “Send Referral” or “Grow My Network” buttons
2. At this point:
 - a. Click on the area on the map you’d like to find a referral
 - b. Search by city or zip code at the top left
 - c. Search by name at the top right
 - d. You can filter by production or certifications using the “Filter” button at the top left
3. Once one of those methods show search results, you can sort by name or units
4. When an associate catches your eye to send a referral to, at the top right of their result box you can:
 - a. Add this person to your referral network
 - b. Send them a referral immediately
 - c. With the down arrow, call or email them

Viewing your referral requests

1. In the “My Referrals” interface, click “Go to Referrals” near the top
2. Here you can see which referrals are awaiting response from you or an associate to whom you have sent a referral, referral requests that have been sent to you, and referral requests you have sent out.

Kelle Artificial Intelligence System

Kelle is an Artificial Intelligence (AI) personal digital assistant developed by KW for KW Associates, similar to Siri, Alexa, Cortana, or Google Assistant. Kelle's aim is to automate as much of your business as possible, especially keeping up with contacts in the Keller Command system. Kelle and Keller Command are still in development, and this guide will be updated as new features are released.

Downloading the Kelle App

1. Open your mobile device's app store
2. Search for "Keller Williams Kelle"
3. Download and install the app
4. Open the app
5. Allow notifications
6. Log in using your MyKW username and password
 - a. If your username and password don't work, contact KW International support: Support@KW.com or 512-306-7191
7. Optional (iOS Only): Enable TouchID or FaceID

NOTE: Kelle is only available on iOS and Android. Kelle is not available on Windows Phone or Blackberry

See What Kelle Can Do

Kelle will eventually interact with many KW systems including KW Command CRM, Calendar, Referrals, CGI, KWConnect content, and more. To see a list of example commands:

1. From the home page, tap the "i" icon in the top right, next to the "Bell" icon
2. Tap on any of the individual sections
3. Either tap on the example command to have Kelle execute it, or go back to the home page and type or say the command

NOTE: Some of the listed integrations/commands are not 100% active yet, and will display incorrect results or errors. Use "Submit Feedback" in the Menu to contact the development team.

Voice commands

Kelle can accept voice commands for any of her available features including Referrals, Snap, CGI, KWConnect, and in the future KW Command and Calendar. To enable voice commands:

1. Tap on the “Menu” button (3 horizontal gray bars) at the bottom right
2. Tap “Settings”
3. Turn ON “Listen for ‘Hey Kelle’” (off by default)
4. Now back on the home page just say “Hey Kelle” - Short Pause - [Question/Action]

Using Kelle to Manage Referrals

Kelle can help you work with the new [KWConnect Referrals](#) tool from your phone instead of a browser on the computer.

Adding an Associate to Your Referral Network

1. Type or say “Add [Associate Name] to my referral network”
 - a. If only one person in the KWConnect Referral system matches your search, skip to step 4
2. If multiple results appear, scroll sideways to find the correct Associate
3. Tap “Select”
4. Optional: Type a note to go along with your invitation
5. Tap “Save” at the top right

Sending a Referral

1. Type or say “Send a referral to [Associate Name]”
2. Choose options/fill information for the referral
 - a. ALL fields are required
3. Tap “Send” at the top right

Accepting, Countering, or Rejecting a Referral

Notifications of Referral Network requests of any type show in the “Notifications” section of Kelle

1. Tap the “Bell” icon in the top right
2. Tap “View” on the “New Referral Request” notification
3. Tap “View Details”
4. Accept, Counter, or Reject the referral
 - a. Accept: You will contact this referral client and provide the referral fee requested in the invitation
 - b. Counter: Choose a new (likely lower) referral fee percentage and include an optional note explaining why
 - c. Reject: You aren’t willing to work with this referral
 - i. Optional: Add a note explaining why e.g. Out of area, too low of a price point, don’t know the referring agent, etc.

Using Kelle To Manage KW Command Contacts

For certain Labs participants (not everyone just yet) Kelle can look up existing contacts and add new contacts in the KW Command system

Add a New Contact to Command

1. Type or say “Add [First and Last Name] to Command”
2. Once Kelle has confirmed that the contact has been added, tap “Enter Contact Details” to add in phone number, email, physical address, notes, etc.

Search for an Existing Contact in Command

1. Type or say “Find [Name] in Command”
2. Kelle will display the current contact information for the contact(s) that match the search
3. Tap the 3 dots under the name to Log Interaction, View Activity History, or Edit Contact

Adding Quick Notes for an Existing Contact in Command

1. Type or say “Add a note for [Name]”
2. Choose from one of the options provided

Adding Detailed Notes for an Existing Contact in Command

1. Type or say “Find [Name] in Command”
2. Tap the 3 dots under the name
3. Tap “Edit contact”
4. Scroll down and tap on the “Notes” section
5. Type your note
6. Tap “Save” at the top right

Kelle Snap

Kelle can look up information about a specific area such as total active listings, average days on market, and average sales price in a “snapshot” of the market, or “Snap”.

1. Type or say “Snap [Zip/City/etc.]
 - a. Alternatively “Snap my location” or “Snap this area”
2. Scroll sideways through results to find the specific area
3. Tap “View Kelle Snap”
4. Tap any of the sections to see further information

Kelle F.A.Q.

- What is my login information to use with Kelle?
 - Log in to Kelle using the same username and password that allows access to mykw.kw.com
- I use my @kw.com email address as the username to log in to mykw.kw.com, why won't it work for Kelle?
 - Kelle must use the actual username for mykw, not the KW email. To find this username:
 - i. Log in to mykw.kw.com
 - ii. Near the top left, next to your picture, below the Profile Completeness percentage bar, click “Profile”
 - iii. Your username will be immediately below your last name
 - iv. You may change this username and click “Save” at the very bottom of the page
- I just reset my mykw password and I can't sign in to Kelle. What do I do?

- For any issues logging in to the Kelle app, please contact KW International support: support@kw.com or 512-306-7191
- Why can't Kelle add contacts for me?
 - This is likely because you have not been accepted into the KW Command Labs group in KWConnect yet.
- How do I change the information or picture shown on my profile when I show up in search on the Kelle app?
 - That information comes from your [KWConnect Referrals Profile](#)
- Calendar/Snap/Mortgage/etc. Is not working for me in Kelle. What do I do?
 - You will need to contact KW International support for these issues: support@kw.com or 512-306-7191
- Does Kelle listen for "Hey Kelle" while the app is closed, like "Hey Siri" or "Ok Google"?
 - No, Kelle is only actively listening for voice commands while the app is open

KW Command

KW Command is the new CRM system currently (2018 08) in development by KW International, specifically for KW Associates. We don't yet know all of the features that will be available in the Command system.

Working With Contacts

Accessing KW Command

1. Visit login.command.kw.com
2. Log in using your mykw.kw.com username and password

Adding a New Contact

1. Near the top right click "Add New Contact"
2. Enter the Contact's information
 - a. At least a name is required

Editing an Existing Contact

1. Search for the contact near the top left, next to the "Filters" button
2. Click on the name of the contact
3. Click the Pencil icon to the right of the name
4. Add/update any information
5. Click "Done Editing" near the top

Add Notes for an Existing Contact

1. Search for the contact near the top left, next to the "Filters" button
2. To the far right of the Contact's name click the 3 vertical dots

3. Click “Add Note”
4. Enter a note
5. Click “Save Note”

Archiving a Contact

1. Search for the contact near the top left, next to the “Filters” button
2. To the far right of the Contact’s name click the 3 vertical dots
3. Click “Archive”
4. Confirm that you would like to Archive

Archive Multiple Contacts

1. In the contact list, near the top right click “Bulk Edit”
2. On the left check the box(es) for the contact(s) you want to archive
3. At the top click the “Select Action” dropdown
4. Click “Archive”
5. Confirm that you would like to archive

Permanently Deleting a Contact

1. Follow steps to archive a contact
2. At the very top right click the “Settings” button that looks like 3 horizontal bars with dots on them
3. On the left under “Command Settings” click “Archive”
4. To the far right of the contact name click the red Trash Can button
5. Click “OK” to confirm delete
6. To delete Multiple contacts check the box to the left of each contact or check the box above the list to select all contacts
7. Click “Delete All Permanently” at the top of the list
8. Click “OK” to confirm delete

Importing Contacts From a File

1. Near the top right, to the left of the “Add New Contact” button, click the button that looks like a box with an arrow pointing down into it
2. Click the “Download” link to download the required template file
3. Paste or type your contacts’ information into that file
4. Save the file
5. Drag the file onto the box that says “Drop files here or click to browse” or click the box to select your file
6. Click “Upload” at the bottom right

Connecting To Outside Services

Command can connect to Gmail and Google Calendar to keep track of email communications with contacts in your database, and appointments with those contacts, automatically. Currently only Google is supported, no other email or calendar systems. Command can also connect to Facebook, Twitter, and Google Ads to manage your ads on those platforms

1. At the very top right click the “Settings” button that looks like 3 horizontal bars with dots on them
2. Click “Settings”
3. Click “Connect” next to the desired service
4. Sign in to your account
5. Allow access

KW Command F.A.Q.

- Where can I find my login information for KW Command?
 - Log in to command.kw.com using the same username and password as for mykw.kw.com
- My login information doesn’t work for KW Command. What Can I do?
 - You may not yet have access to KW Command. Try again at a later date
 - Double check that this information works for mykw.kw.com. Log out and log back in by manually typing the information you are using for KW Command
 - If you are using your @kw.com email address to log in to mykw, that will not work as the username for KW Command.
 - i. Log in to mykw.kw.com

- ii. Near the top left, next to your picture, below the Profile Completeness percentage bar, click “Profile”
 - iii. Your username will be immediately below your last name
 - iv. You may change this username and click “Save” at the very bottom of the page
- If none of these solutions work, please contact KW International Support: support@kw.com or 512-306-7191
- Can I import my contacts from my phone/email/social media/etc?
 - Yes, just follow the instructions above to download the template file, and paste in the information for your contacts from any of those sources.
 - i. For help exporting your contacts into a csv file that you can paste from, contact us at Support@ScottLeRoyMarketing.com
- Will my eEdge Contacts automatically transfer to KW Command?
 - We have not been informed whether contacts from eEdge will automatically be moved to KW Command, but contacts can very easily be exported from eEdge and imported into Command.
- How do I set follow up reminders for my KW Command contacts?
 - As of 2018 08 this feature is not yet available for KW Command

Career Growth Initiative (CGI)

The Career Growth Initiative was introduced in Summer 2015 as a translation of the proven Growth Initiative tools that Team Leaders have been using since 2011 to grow KW into the #1 Real Estate company in the US, as a way to help KW Associates set goals, break those goals down into actionable steps, and keep track of those actions. The CGI is accessed through KWConnect.com or cgi.kw.com, which Associates are automatically signed in to if they are signed in to mykw.kw.com

Setting your CGI Goals

Your Market Center should have either CGI classes or a way to set a meeting with the Agent Services Coordinator (ASC) or similar role to help you set your CGI goals. This can only be done with a class code generated by your Market Center leadership, which automatically changes every 24 hours (so a class code that works one day, won't work the next day). To prepare for setting your CGI goals, think about the following:

- Where do you want to be this time next year? In two years? Five years? Ten?
 - Professionally, personally, spiritually, financially, location, etc
 - Write this down
- How much income would accomplish all of those things for you?
 - Post-tax, post-commission split, post-expenses
 - Cash in the bank to spend on your life
 - Bills, groceries, mortgage, kids, cars, activities, gifts, travel, etc
- What are your business expenses?
 - Monthly and yearly
 - Commission split to cap
 - Office fees
 - Office rent
 - Phone
 - Mileage
 - Admin/assistant
 - Marketing

- Website
- Car insurance
- Printing (flyers, business cards, etc)
- Association dues
- Travel
- Continuing education
- Licensing fees
- How much time do you have to dedicate to your Real Estate Career?
 - Full Time
 - Part time after a day job
 - Part time, transitioning to full time away from day job
 - Free time/for fun
 - Side job/investment properties/flipping

With those in mind, your Market Center leadership will walk you through the CGI Calculator, found on <http://kwconnect.com/page/cgi> (make sure you're logged in to mykw.kw.com so you can be automatically logged in to kwconnect.com as well) then on the "View Full CGI Calculator" button. Alternatively, to go directly to the calculator, go to <http://cgi.kw.com>. Below are the fields on the calculator, which are explained in detail on the calculator page:

- Profit (That after-tax/expenses/commission split income number)
- Tax % (Your estimated yearly taxes)
 - <https://www.irs.com/articles/how-determine-your-income-tax-bracket>
 - <https://www.irs.com/articles/2016-federal-tax-rates-personal-exemptions-and-standard-deductions>
- Royalty Cap (\$3,000 for all KW associates)
- Company Dollar Cap (Set by your Market Center)
- Monthly Expenses (For your business, see the above list)
- Additional Means (Do you make additional income through your Real Estate business, maybe as an Admin for a team)
- Commission % (Average commission percent for your half of a closed deal)
 - If you are a brand new associate, leave the default
- Avg Home Price (For homes that you've sold)
 - If you are a brand new associate, check with your Market Center for the average closing price for the office

- Seller focus % (What percent of your business do you want to be sellers versus buyers, since sellers have better ROI as outlined in “The Millionaire Real Estate Agent”)
 - If you are a buyer agent, just flip that in your head to “Buyer” focus
- % Conversion Rate (Listings taken to listings closed)
 - If you are a brand new associate, 50% is a good starting point
 - If you are a buyer agent, flip that in your head to “Broker agreements signed to closings”
- % Conversion Rate (Listing appointments to listings taken)
 - If you are a brand new associate, 50% is a good starting point
 - If you are a buyer agent, flip that in your head to “Buyer appointments to broker agreements signed”

The calculator will use your numbers to calculate your Total Gross Commission needed for the year/month, and then break that down into total number of closings needed (seller and buyer) needed for the year/month, and then break that down into total number of Listings taken needed for the year/month, then down into Total Listing Appointments needed for the year/month. You will be surprised how quickly a Total Gross Commission of \$200,000 or more breaks down into just 6 or 8 listing appointments per month, depending on your conversion rates.

Using the CGI tools

Once your goals have been set, you are able to update them any time by going to the calculator using the same steps mentioned before, then clicking “Set My Goal”, if you find that your expenses, conversion rates, or even your goals are different than you had initially expected.

Also found on the CGI page on KWConnect is the CGI tracker where you enter your listing appointments as you have them. Your actual listings taken, closings, and gross commission amounts will automatically go in each month.

Below that are tools to help you organize your goals, practice the steps to get those appointments, and track your appointment and production numbers. We won't go into much detail here because there are individual videos for how to use each tool on the CGI page.

KW Reports

The reports section is full of useful information about your production and activities within KW, from your year-over-year production to how many people have downloaded your KW App.

App Download Ranking

1. Log in to mykw.kw.com
2. Near the top left, next to your picture, click “Reports”
3. Hover over “Reports”
4. Hover over “Rankings”
5. Click “Agent Mobile Downloads”

This report will show a ranking of all KW Associates by how many people have installed their KW App. Your number and rank will be displayed above the list.

Please note that this report will not show you **who** has downloaded your app. To see information on who has created an account/saved properties in your app, see [“See Who Has Created an Account/Saved Properties in your KW App”](#)

eEdge Website (Legacy)

NOTE: When the new KW Website by Placester was announced in 2015, it was also announced this would be the website of the future for KW Agents. At Family Reunion in February of 2018, that decision was rescinded and now KW Associates can use either the eEdge or the Placester site, however KW International recommends using the Placester site for its customization options.

See this page for the similarities and differences between the two sites: <http://scottleroymarketing.com/why-two-kw-websites>

Find the eEdge Website

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click the Plus Sign (+) next to “myMarketing”
3. Click “Manage eEdge Website”
4. Locate your address bar to see the eEdge website domain (_____.kwrealty.com or a custom domain for pro users)

Edit the Homepage

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click the Plus Sign (+) next to “myMarketing”
3. Click “Manage eEdge Website”
4. Select PAGES on the left
5. Select the drop down menu and click on HOME
6. Click the save option

Edit the Sell Page

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click the Plus Sign (+) next to “myMarketing”
3. Click “Manage eEdge Website”
4. Select PAGES on the left

5. Select the drop down menu and click on SELL
6. Click the save option

Update the Website Images

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click the Plus Sign (+) next to “myMarketing”
3. Click “Manage eEdge Website”
4. Click SITE IMAGES on the left
5. Select the EDIT or ADD red button to update each image
6. Choose from the templates provided, or browse for your own images from the instructions at the top right
7. Select the save option

Update Communities Served

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click the Plus Sign (+) next to “myMarketing”
3. Click “Manage eEdge Website”
4. Select COMMUNITIES SERVED on the left
5. Click the ADD communities button
6. Add in the name of the community
7. Add in a zip code or name of the area one at a time
8. Click the blue link that will pop up after you add in the zip code or name
9. Add in Descriptive Text, Map Location, SEO Title and Description
10. Click the SAVE option at the bottom left

Update Previously Saved Communities Served

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click the Plus Sign (+) next to “myMarketing”
3. Click “Manage eEdge Website”

4. Select COMMUNITIES SERVED on the left
5. Click the pencil and paper icon to the right of the community to update
6. Update the information
7. Click the save option at the bottom

Edit the About Page

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click the Plus Sign (+) next to “myMarketing”
3. Click “Manage eEdge Website”
4. Select PAGES on the left
5. Select ABOUT from the drop down menu
6. Update the page and click the save option

Add a Custom Page

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click the Plus Sign (+) next to “myMarketing”
3. Click “Manage eEdge Website”
4. Select the PAGES option on the left
5. Click the Custom Page Option
6. Add a Title and Click Save
7. Add the information for the custom page and click save

Change Your Website Template

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click the Plus Sign (+) next to “myMarketing”
3. Click “Manage eEdge Website”
4. Select THEME on the left (may already be selected)
5. Find the template you like

6. Select the SAVE option to active
7. Select SITE IMAGES on the left to update the banner image for the new template

eEdge Website F.A.Q.

- Am I Obligated To Use The eEdge Website?
 - No. Both the eEdge and Placester website are included in your technology fees each month to Keller Williams. You are not obligated to utilize these websites, but have the option of using either or both if you choose to.
- What is the Difference between the Two Websites?
 - eEdge Website – This is the Market Leader website. You cannot customize this website as much, but it is relatively easy to navigate for clients and leads to utilize. Will be retired near the end of 2018
 - Placester Website – New website provided by Keller Williams and Placester. Allows for greater SEO and mobile responsiveness. We highly suggest using this website as this is the website of the future for KW Agents.
- Can I Forward my eEdge Website Domain to Another Website?
 - No. The eEdge website domain is solely tied to the eEdge website.
- Can I Have a Custom Domain Name Instead of _____kwrealty.com?
 - The Pro account with eEdge will allow you to have a custom domain and a custom eEdge email address tied to that domain. Without the pro account, you can only forward a custom domain purchased at a domain registrar to your eEdge website, which leaves the “.kwrealty.com” address in the address bar.
- Is There a Support Number For eEdge?
 - Yes. Market Leader is the company that has helped to create the eEdge back office. Their support phone number is 1-877-450-0088 or you may email them at support@marketleader.com

eEdge myEmail (Legacy)

eEdge email is handy for sending messages to multiple contacts within your database, but should not be your primary email used for sending and receiving messages on a daily basis. See instead the [“KW Email”](#) section.

Notes:

- A maximum of 2,000 messages may be sent from within eEdge per day
- A maximum of 5,000 messages may be sent from within eEdge per month

Find myEmail

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click “eEdge Messages” under “myEmail”

Send an email from myEmail

1. Log in to mykw.kw.com
 2. In the eEdge Control Panel, click “eEdge Messages” under “myEmail”
 3. Click the red “Compose Email” button
 4. Compose the email
 5. Add in contacts one at a time or click the red “To:” button at the top right to select from your myContacts database (recipients MUST be added to your contacts prior to sending the message)
 6. Click the red “Send Now” button
- *If you have the pro account you may also schedule out the email to be sent on a different day

View Sent Email

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click “eEdge Messages” under “myEmail”
3. Click the “Sent Items” tab near the top

View Analytics of Sent Email

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click “eEdge Messages” under “myEmail”
3. Click the “Sent Items” tab near the top
4. Find the sent item
5. Click “View Stats” on the right
 - a. “Sent To”: Number of contacts this piece was sent to
 - b. “Open Rate”: Percentage of the contacts this piece was sent to that opened the email piece
 - c. “Clicked Rate”: Percentage of the contacts this piece was sent to that clicked on a link within the email after opening it

View Emails Sent to a Particular Contact

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click “View Contacts”
3. Find the contact
4. Click on the name of the contact
5. Scroll to the bottom of the contact details page
6. Click the “Email” section to expand it down
 - a. See all sent and received emails for that contact

Send an image in your eEdge Email

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click the Plus Sign (+) next to “myMarketing”
3. Click “File Manager”
4. Select IMAGE MANAGER on the left hand side
5. Click the red “Upload Image” button
6. Click the red “Select Files” button
7. Find the image on your computer

8. Click the red “Upload” button at the bottom of the box
9. In the list of uploaded images, click the name of the image
 - a. This opens a preview of the image
10. Right click on the image preview
11. Click “copy image url” (or destination url, picture url, etc depending on your browser)
12. Close the image preview
13. Click the envelope icon at the top right
14. Click Compose Email”
15. In the toolbar of the email body, click the “Insert Image” icon
 - a. Looks like mountains with the sun/moon in the sky
16. Paste the URL you copied of the preview image in the “Source” box
17. Click the blue “OK” button
18. Add contacts and the rest of your email body

Change eEdge Email Signature

This signature is only for new composed messages, not for campaign emails

1. Log in to mykw.kw.com
2. In the eEdge Control Panel, click “eEdge Messages” under “myEmail”
3. In the top right, click “Account”
4. Click “Email Settings”
5. On the left, click “Email Signature”
 - a. Should open by default
6. Update the email signature
7. Click the "Save" button

SUPPORT

Keller Williams Support

- 512-306-7191 option 0 / support@kw.com

Market Leader / eEdge Support

- 1-877-450-0088 option 2 / support@marketleader.com

DotLoop Support

- 513-257-0558 / support@dotloop.com

Placester Support

- 1-800-728-8391 / support-kw@placester.com

Scott Le Roy Marketing

- 321-236-2568 / support@scottleroymarketing.com

HELPFUL TRAINING CLASSES

myKW and KWCommand Academy 1 Hour Training

www.EEDGEACADEMY.com (12pm ET Every Tuesday)

www.SLMWEBINAR.com (Available 24/7 – Pre-Recorded)

myKW Tips (Available 24/7)

www.SLMTIPS.com

**Advanced Classes, Placester 101/201, DotLoop 101/201, Database Management, SLM Overview,
Kelle/ Referrals, KWConnect and Marketing Courses (available 24/7)**

www.eEDGEACADEMY.com (1-2pm ET Every Wednesday - Friday)

www.SLMTRAINING.com (Available 24/7 – Pre-Recorded)