myKW Leadership Cheat Sheet

VOLUME I.2

Scott Le Roy Marketing
Support@ScottLeRoyMarketing.com
www.ScottLeRoyMarketing.com

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KW Technology Passwords

How to guide your agents to reset their passwords associated with their KW technology.

Updating myKW.KW.com Password

1. Log in to myKW.kw.com
2. Hover over Technology on the top black toolbar
3. Change Password
    a. Note: Recently KWRI has made it so that the 'Forgot Password' link on the myKW login screen, only sends the password reset link to the agent's KW email account. If they are unable to login to that email account, here is the link we use to send the password reset link to the agent's recovery email address on file and/or the MCA's email address: https://secure.kw.com/sso/getUser.action

Updating KW Gmail Password

1. Log in to myKW.kw.com
2. Hover over Technology on the top black toolbar
3. KW Email
4. Manage Your KW Email
5. Scroll down to find the New Password section

Once this is reset, the agent will be able to go to gmail.com to login to their account right away!

Updating Dotloop Password

The best way for agents to access their Dotloop account, is by going to myKW.kw.com and clicking 'Start myTransactions' on the top, center eEdge Control panel box. The agent will not be prompted for another password here! However, if an agent wishes to use the Dotloop mobile app or access their account by going to Dotloop.com, they will need their Dotloop email address/password.

How to Reset an Agent's Dotloop Password

1. **From Dotloop.com** - Click 'Forgot Your Password?' to send over a password reset link
2. **If the Agent Does Not Know What Their Dotloop Email Address Is** - From an Admin Dotloop account, click the people icon on the top right → Click the Market Center name on the left side → Use the search bar to search for the agent to view their Dotloop email address

How Do New Agents Receive Their myKW Login Information

New Agents

Once an agent is entered into WinMORE, the agent's myKW username/password is automatically generated and sent to whichever email address is entered into WinMore for that agent. The myKW username/password is also sent to the MCA's email account.

Agents Returning to Keller Williams/Transfer Agents

If an agent was with KW previously or is transferring from another market center, their myKW login with not be sent over when the agent is entered into WinMORE. Ideally, the agent may remember their myKW login information! If not, the agents' myKW username can be found in the Whitepages and their password can be reset via the above steps (Updating Your myKW.KW.com Password).

To Locate the agents' myKW username in the Whitepages:

1. Login to an admin myKW account
2. Scroll to the very bottom of the page and select 'White Pages' from the Quick Links box
3. Select the top bubble: 'Associate Information - Search/Edit' to search the agent's first and last name
4. The Username field can be found near the top of the page. Once you have the username, you can reset the myKW password by clicking here!

How to Look Up Agents' Email & Website Addresses

What is the Agent's KW Email Address?

1. Login to myKW
2. Hover over 'Technology' on the top black toolbar
3. KW Email
4. Select 'Sign Up' on the right side to view the current KW Email Address
5. The agent can then go to gmail.com to login to that email address right away!

Tip: You can also click 'edit email accounts' from this page to view/request an email alias. Email aliases can receive emails to the same inbox as the agent's primary KW gmail address.

How to Set Up an Agent's KW Email Address

1. Login to myKW
2. Hover over 'Technology' on the top black toolbar
3. KW Email
4. Select 'Sign Up' on the right side
5. You can select one of the available email addresses on this page and create a password

6. Or simply click “I’d like to choose a different email address” on the bottom of the page
    - From here, you can type in the email address in the first field and click the drop down box on the right side to select the domain (i.e. @kw.com)
    - Type in the preferred password and click ‘Create Email’

What is the Agent’s Placester Website Address?

1. Login to myKW
2. Hover over ‘Technology’ on the top black toolbar
3. KW Website
4. Go to My Website
5. Click the 9 dots in a square on the top right of the screen
6. Sites
7. Click ‘View Live Site’ on the right side in blue
8. The website address will be in the top URL bar (i.e. agentsname.kw.com)

How to Change the Agent’s Placester Website Address

1. Login to myKW
2. Hover over ‘Technology’ on the top black toolbar
3. KW Website
4. Go to My Website
5. Click the 9 dots in a square on the top right of the screen
6. Sites
7. Click ‘Edit Site’ on the right side in blue
8. Scroll to the very bottom of the screen and select ‘Custom Domain’
9. Click ‘edit’ next to the agent’s current Placester website address
10. Type in the address the agent would like instead (in all lowercase letters) and click to ‘Check Availability’
11. If available, click ‘Save’ to update this new address!

What is the Agent’s eEdge Website/Email Address?

1. Login to myKW
2. Click the + to the right of myMarketing on the top, center eEdge Control Panel box
3. Manage eEdge Website
4. Click ‘Account’ on the top right of the gray toolbar
5. My Account
6. The eEdge Website and Email Address can be found in the top section under ‘Profile Details’ (i.e. agentsname.kwrealty.com and agentsname@kwrealty.com, respectively.)

How to View eEdge Emails

The eEdge email address (ending in @kwrealty.com), is used primarily to send marketing material from the system. If a client clicks to reply back to the marketing email, it will automatically reply back to the business email address the agent requests to use! It is unlikely that agent's will receive emails to the eEdge email address, unless they market it out (which, we wouldn't recommend. See the below section on Website & Email Address Recommended for Business Cards.) Unfortunately, there is not a way to forward this email address. If by chance, an email does sneak into the eEdge email system, activity alerts are available to set up to notify the agent of any emails, so they can tend to those right away!

To check the eEdge Email Inbox:

Login to myKW.kw.com
Click 'eEdge Messages' under myEmail, on the top, center eEdge Control Panel box

eEdge Activity Alerts

Text message and email alerts are available to set up if an agent receives a lead, email to the eEdge email address and for daily reminders. We activate these activity alerts when setting up your agents, however, to cross check the activity alerts:

Login to myKW.kw.com
Click 'View Contacts' on the top, center eEdge Control Panel box
Select 'Account' on the top gray toolbar, on the right hand side
My Account
Select 'Activity Alerts' on the left side in blue

What is the Agent's eAgentC Website Address?

The eAgentC site is set to retire in 2018 and is primarily used for updating the backend of the KW mobile app. The main reason you might need to determine an agent's eAgentC website address is if you're sending off their Wolfnet IDX paperwork; this is the address that would be need to be listed as their URL. To view that:

1. Login to myKW.kw.com
2. Click the + to the right of myMarketing on the top, center eEdge Control Panel box
3. Manage eAgentC Site
4. Click the orange 'Preview Website' button on the left hand side. The agent's eAgentC website address will be viewed in the top address bar (i.e. agentsname.yourkwagent.com).

Website & Email Address Recommended for Business Cards

We would highly recommend advising your agents to use their @kw.com email address and Placester website address for their business cards. The Placester website is being call the "Website of the Future" for all KW agents and will eventually be the only website that agents have.

The Difference Between the eEdge & KW Email Addresses

All agents receive 2 email addresses with the myKW system, which can be confusing for agents. You will want to encourage agents to use the email address ending in @kw.com, which can be logged into at gmail.com. The eEdge Email Address, ending in @kwrealty.com, is used primarily to send out marketing material from the eEdge system. If a client clicks to reply back to the marketing email, it will automatically reply back to the business email address the agent requests to use!

The Difference Between the eEdge, eAgentC & Placester Sites

The Placester Website is being called the "Website of the Future" by KW. We would highly recommend encouraging your agents to use their Placester website address on their business cards and all marketing material, as this is the website that will be sticking around! KW has indicated that both the eEdge website and eAgentC site will be retiring in 2018. The eAgentC site is primarily used to update the KW mobile app.

How To Get the Agent's Placester Website to Launch

To get an agent's Placester website to launch in their account, 2 main things must be done:

1. The KW Email account must be created (We do this during the agent's setup, but you can click that link to learn how to set this up for your agent.)
2. The agent's MLS ID must be entered into the Whitepages from an admin myKW account
    a. Note: Since the MLS ID must be entered into the Whitepages from an admin myKW account, we are not able to do this upon setting up your agent. Please feel free to let us know as soon as the MLS ID is entered into the Whitepages for us to set up the agent's Placester site!

Once these items are completed, the Placester site will launch within 24-48 hours.

Entering the Agent's MLS ID in the Whitepages

The agent's MLS ID must be entered into the Whitepages for the Placester website to launch, Wolfnet IDX to be setup and to allow listings to syndicate out. This is a vital part of an agent's setup and must be done from an admin myKW account.

1. Login to an admn myKW account

2. Scroll to the bottom of the myKW homepage to find 'White Pages' in the Quick Links box
3. Select the top bubble: 'Associate Information - Search/Edit' to search the agent's first and last name
4. Click 'Update MLS Info' at the top of the page to enter in the agent's MLS ID

Run a Report on Agents Who Do Not Have MLS ID in Whitepages/No KW Email

Since agent's must have their MLS ID in the Whitepages and a KW Email address created in order to launch their Placester website, KWRI has created a report that tells you Y/N if this has been completed for each agent in your Market Center:

1. Login to an admin myKW account
2. Click 'Reports on the top left
3. Hover over 'Reports' on the top toolbar
4. Web Statistics
5. Agent MLS ID and Email Summary
6. Click on your Market Center name on this report to view the full list

IDX Setup and Agent's Listings Syndication

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:

Wolfnet IDX for for the KW App

This enables agents to see who has created an account and saved properties on their app, so the agent can capture the lead. This will need to be set up to make any changes to the agent's contact information or headshot on the mobile app.

- To set this up:
  - Log in to mykw.kw.com
  - In the eEdge Control Panel, click the Plus Sign (+) next to "My Marketing"
  - Click "Manage eAgentC Website"
  - On the left, click section 4.0
  - Click section 4.1
  - Check the box under the dropdown
  - Click "Sign Up"
    - If you don't see the checkbox, the agent's MLS ID needs to the KW Whitepages, then wait 15 minutes and follow these instructions.
    - Additional steps may be required, such as paperwork, depending on your MLS board.

- Once these steps are done, the agent will receive an email from Wolfnet within 2-10 business days with the subject line: “Welcome to your eAgentC IDX Solution, Powered by Wolfnet”. This email will contain URLs in the body of the email, which have to be entered into section 4.1 to activate Wolfnet IDX. Please encourage agents to be on the lookout for that email! They can simply forward this email to support@scottleroymarketing.com for us to complete this for them!

Market Leader/eEdge IDX

Allows eEdge site visitors to search the full MLS, and enables agents to create listing alerts and "listing-enabled" marketing materials within eEdge.

- If you are unsure of the process on how to setup your agents’ eEdge IDX, follow the below instructions to locate instructions and any paperwork that might be needed to activate this:
    - Login to mykw.kw.com
    - In the eEdge Control Panel, click the Plus Sign (+) next to “My Marketing”
    - Click “Manage eEdge Website”
    - On the left side, scroll down to select “My Account” in blue
    - MLS Setup
    - If you see the correct board listed, click the blue “Instructions” link to view paperwork and instructions on how to activate the eEdge IDX
        - If you do not see the correct MLS board on this list, select “Add MLS Feed” to add that in

If the Market Leader IDX is activated, you will see the MLS board with ‘Approved’ next to it. You can then click to add the Agent’s MLS ID(s) and Office ID(s).

Placester/KW Website

Enables site visitors to search the full MLS. To set up Placester IDX:

- Login to mykw.kw.com
- Hover over ‘Technology’ on the top, black toolbar
- KW Websites
- Go to my Website
- Click the 9 dots in a square on the top right of your screen
- Sites
- Click ‘Edit Site’ on the right side in blue
- IDX Integration

Ideally, you will be able to click ‘Use this MLS’ to the right of your MLS board name and click ‘Save’ to select this right away! If you do not see the correct MLS board listed, further paperwork may need to be sent in to complete this activation.

Who to Contact If You Have Questions on Setting Up IDX in Your Office

To learn what is required to set up an IDX feed for each of these providers, either contact your MLS directly, or the site providers themselves:

- Wolfnet: support@wolfnet.com, 1 (866) 965-3638
- Marketleader: eedgesupport@kw.com, 1 (800) 491-4234
- Placester: support-KW@placester.com, 1 (800) 728-8391

Making Listings Display in eEdge - Market My Listings

1. The agent's eEdge IDX must be setup
2. The agent's MLS ID and/or Office ID must be entered into the MLS Setup section of eEdge
    - Login to myKW
    - Click the + to the right of myMarkeing on the top, center eEdge Control Panel box
    - Manage eEdge Website
    - Click 'My Account' on the left side in blue
    - MLS Setup on the left side in blue
    - You will want it to say 'Approved' next to the MLS Board the agent is a member of. Click 'Add Agent ID' to make agent's listings pull in. Click 'Add Office ID' to bring in all office listings.

    Note: It is a good idea to enter in both the agent ID and office ID to this section to allow the agent to more easily create marketing materials for listings in the office, if they do an open house for another agent, for example!

How Long Does it Take for Listings to Syndicate?

Once a listing is entered into the MLS, it generally takes 24-48 hours to pull over into the KWLS and can take up to another 24 hours to syndicate the listing to all real estate. The general rule of thumb is to allow up to 72 hours for the listing to syndicate to all real estate website, however, this generally happens quicker.

What To Check if Agent's Listings Are Not Syndicating

1. Ensure the Agent is ListHub enabled (if you have an agreement with ListHub)
    - Login to myKW
    - Hover over 'Technology' on the top black toolbar
    - KWLS
    - Ensure the checkbox is checked under your market center name
        - Note: if your office does not have an agreement with ListHub, listings will need to be manually entered into the KWLS
2. Ensure the agent's MLS ID is entered into the Whitepages
3. Make sure the listing is Active in the MLS. Only Active listings will syndicate out!

4. If all of this is true, run a ListHub Exceptions Report from an admin myKW account to see what may be blocking this

How to Run a ListHub Exceptions Report

1. Login to an admin myKW account
2. Click 'Reports' on the top left
3. Hover over 'Reports' on the top toolbar
4. Web Statistics
5. ListHub Exceptions

This will show you any errors that may be blocking the agent's listing from syndicating out!

ListHub

With ListHub, Keller Williams associates can distribute listings to more than 80 national sites - powering over 750 sites total! Listings are accessed in the KWLS and distribution is automatic. Plus ListHub will pick up changes made in the KWLS (added photos or expanded remarks) for display on ALL Keller Williams syndicated listings!

There are two ways that your listing can flow through syndication. If the KW Connector is available and your market center subscribes, your listing comes from the MLS through the KW Connector into the KWLS automatically. Alternatively, you can directly enter your listing information into the KWLS. Once in the KWLS, you can import additional photos and expand on the listing description. The KWLS then syndicates to more than 150+ sites through ListHub.

KW Connector (Single Point of Entry)

With the KW Connector MLS listings automatically populate the KWLS (available in ListHub-enabled MLSs). Saving countless hours of redundant data entry and ensuring accuracy across listing databases.

Making Sure Your Agents Are ListHub Enabled

For listings to pull over into the KWLS, the ListHub Enabled checkbox must be selected in the agent's myKW account. To cross check that this is done:

1. Login to mykw.kw.com
2. Hover over 'Technology' on the top black toolbar
3. KWLS
4. Click the checkbox next to your market center name under 'ListHub Enabled'

***Note from KWRI:** It is important for agents to keep the ListHub enabled box in their KWLS checked, so the listings can be updated daily and prevent any premature expirations of listings. Keeping this box enabled will also resolve about 90% of any issues.

***Note:** If you do not see a ListHub box on this page, it is likely that your office is not subscribed to ListHub. In this case, all listings would have to be manually entered in, to allow the listing to syndicate out.

How to to Subscribe to ListHub as a Market Center

Registration on a Market Center level can be completed at: http://www.listhub.net/broker-Keller-Williams.html

For more information about all of the ListHub services for Keller Williams, please contact the ListHub team by phone or email directly. (Link to email on above ListHub website)

Call 1.877.847.3394, Select Option 1

KWLS

The KWLS is a portal that allows agents to control if and how their listings syndicate out to 150+ real estate websites. If the KW Connector is available in your office, listings will automatically pull over into the KWLS within 24-48 of going live in the MLS. If your office does not have the KW Connector, agents can manually enter their listings into the KWLS. From that point, the listing with syndicate out to all real estate websites within 24 hours.

Any changes made in the KWLS, whether it be made to the price, photos, agent comments or other listings data, will also be pushed out to all real estate websites. Agents can also add additional photos and comments to the KWLS to optimize their listings further.

Find and Edit Listings in the KWLS

1. Login to mykw.kw.com
2. Hover over Technology on the top, black toolbar
3. KWLS
4. Select ‘Find a Listing’ on the top, white toolbar
5. Search for listing and click on blue MLS # on the left side to open listing details
6. From here you can edit listing details
7. Use the red toolbar to toggle to edit images, open houses, virtual tours, etc.

*Much of the information in the KWLS is updated every morning by the feed coming from the MLS. There is an option to lock the agent remarks and photos, though, to keep these updates in place.

Ensure Listings Are Auto-Approved When Coming From the MLS

Note from KWRI: These listings need to be approved by your Market Center but there is an option for auto-approval that most market centers use. If you see your listings come over, but in 'Submitted' status please let your MCA know that there is a checkbox on the Market Center white pages to opt-out of Market Center approval. This will allow your listings to be automatically approved and save a lot of time in the syndication of your listings, so please encourage your MCA to check this box.

To do this:

1. The MCA will need to login to myKW.kw.com
2. Click on 'White pages' on the bottom right of the myKW homescreen
3. 'My Profile' on the left side
4. Select the market center name at the top of the page (i.e. MCA at [Your Market Center Name]
5. Make sure 'Yes' is selected next to 'Auto-Approve Listings'

Market Center Websites

Market Center eAgentC Website

All Market Center websites can be accessed from the MCA's myKW account. To find and edit the Market Center eAgentC website (i.e. yourMCname.yourkwoffice.com):

1. Login to the MCA's myKW.KW.com account
2. Select the myOffice tab on the eEdge Control Panel box
3. Click the + to the right of myMarketing
4. eAgentC Website Admin
5. From this page, you may need to select which site to edit, near the bottom of your screen. Once you do, you will see the editing menu display on the left side
6. Click the orange 'Preview Site' button on the left side to view your live MC website right away!

***Note: Editing the office eAgentC website works best when using Mozilla Firefox Browser**

Adding & Updating a Preferred Vendors Page on the MC eAgentC Site

To Add a Preferred Vendors page to your MC eAgentC site:

1. Click 2.0 Manage Your Content on the left side menu
2. 2.1 Manage Navigation/Content
3. Click the gray 'Page' tab at the top
4. Leave top drop down on 'Add New Page', give the page a 'Menu Name' & 'Browser Title' (i.e. Preferred Vendors)
5. Scroll down to start adding preferred vendor information in the text box that displays

*Tip: Any logo images that you wish to add to this page must first be uploaded into section 2.2 Manage Photos. You will then be able to click the image icon on the Preferred Vendors page to add any logos from the library!

If you already have a Preferred Vendor page on your Market Center website, you can edit it per the below steps:

1. Click 2.0 Manage Your Content on the left side menu
2. 2.1 Manage Navigation/Content
3. Click the gray 'Page' tab at the top
4. In the first drop down box, next to 'Add or Edit Page', click to find your Preferred Vendors page from that list. This will display in the below text box for you to edit right away!

Market Center Placester Website

The office Placester site sits in the MCA's myKW account. We are happy to setup the Market Center Placester site for you! To have this done, click the link to fill out a questionnaire: scottleroymarketing.com/placester-setup

To access the MC Placester website:

1. Login to the MCA's myKW.KW.com account
2. Hover over 'Technology' on the top black toolbar
3. KW Websites
4. Go to My Website
5. Click the 9 dots in a square on the top right of the screen and select 'Sites' from the drop down menu
6. Many MCA accounts will have 2 sites, a personal and market center account. Click 'Edit Site' in line with the market center site.

Market Center Recruiting Website

All market centers receive a recruiting website as well, which can be edited from careers.kw.com/admin. The username/password on this page was sent to the MCA's email address by KWRI when the site originally launched. If you are unsure of your password you can click 'Lost Your Password?' on this page to put in the MCA email address (klrw###@kw.com) or username (kwmc###) to have a password reset link send over right away!

If you'd like for us to set up your Market Center Recruiting site, click the link below to fill out a questionnaire to have this done:

scottleroymarketing.com/recruiting-website

Production Panel on myKW Homescreen

The production panel on the agent's myKW home screen shows the agent's production about a month behind. After the MCA transmits the office production information to KWRI on the first three business days of every month, KWRI then updates the production panel for all agent accounts.

Production Panel is Not Displaying on myKW Home Screen

If an agent's production panel is not displaying at all on their myKW home screen, this is typically caused by Adobe Flash having been disabled in your browser or not having Adobe Flash downloaded to begin with.

To Download Adobe Flash Player
You can simply Google "Download Flash". The first option that will display is a large box with the Flash logo and a link to https://get.adobe.com/flashplayer. This is completely free and you will need this to activate the production panel on your myKW home screen.

To Enable Flash on Your Browser (Google Chrome)

1. Open a brand new tab or window and type into the address bar: chrome://settings/content and click enter.
2. Scroll down to find and click on the the 'Flash' option
3. From here, you can toggle if you'd like your browser to ask you before running Flash. You can also click 'Add' under the 'Allow' category to add mykw.kw.com so that this will be used right away when opening your myKW account.
4. Lastly, pull up a new tab for mykw.kw.com to view your Production Panel right away

Here are videos on how to enable Flash in Chrome and Firefox:

If you are using Google Chrome for your browser: https://youtu.be/5kyuLOMWw5o
If you are using Mozilla Firefox for your browser: https://youtu.be/0emPXa9aJaI
If you are using a different web browser, try this article:
http://www.thewindowsclub.com/enable-adobe-flash-player

If the Agent's Production Panel is Showing All Zeros
Unfortunately, this is an issue that KWRI is working on fixing up. They have let us know that this issue is caused by high volume on their servers. KWRI has advised two work around methods, while they work on further correcting this issue:

1. Login to myKW.kw.com during non-peak times, such as early mornings or late in the evening
2. Use the 'Reports' function on the top left of the myKW home screen to access your production numbers
    - Login to myKW.kw.com
    - Near the top left, to the right of your picture, click 'Reports'
    - Hover over the 'Reports' tab

- Hover over 'Associates'
- Click 'Multi-Year Trends'

Updating Roles for the Whitepages

The associate role is important in determining which functionalities the associate receives in his/her myKW account. Roles can be updated in WinMORE and populate into the Whitepages. It is important for this 'Agent' role to be given to receive full functionality to websites, agent profile, the eEdge Control Panel, etc.

If an associate has an **admin role** you will notice that his/her myKW home screen will *not* have access to an eEdge Control Panel. That associate will just need to access Dotloop directly from Dotloop.com. If the associate needs access to an eEdge Control Panel box, for whatever reason, a **Technology Coordinator** role can be given to populate the eEdge Control Panel.

Team Leader and MCA Roles typically must be approved by the region first. Once approved, these roles will receive a myOffice tab on their eEdge Control Panel box as well. This myOffice section will give them shared access to a Leadership eEdge account, which is shared and viewable through the TL, MCA and OP's myKW account. This allows all three roles to share a contact database, recruiting and retention campaigns and marketing material.

The KW Mobile Search App

Each agent receives a KW Mobile Search App branded to the agent specifically. This app is for your agents to distribute to their clients to be able to search the entire country of listings from!

How to Find the Agent's Mobile App URL, App Code and QR Code

1. Login to the agent's myKW.kw.com account
2. Click the + next to myMarketing on the top, center eEdge Control Panel box
3. Manage eAgentC site
4. On the left hand side, select 4.0
5. 4.5 Mobile Property Search
6. Ensure the correct Market Center name is displaying in the drop down menu
7. You will see the agent's Mobile App URL, Mobile App Code and QR code on this page!

What Are The Mobile App URL, Mobile App Code and QR Code Used For

The Mobile App URL

- To download the app, the agent can simply copy and paste the Mobile App URL in the browser bar.
- This URL can be shared to clients directly for clients to download the agent's branded mobile app right away!
- This Mobile App URL is a great thing to add to the agent's email signature to allow clients to easily download the app

The Mobile App Code

- Another way for clients to download the agent's branded mobile is by texting the Mobile App Code to "87778"
- Also, if a client has already downloaded the KW Realty Mobile app to their phone from the app store, the mobile app code can be used to connect the generic app to the agent.

The QR Code

- Each agent receives a QR code, that if scanned, will take the client to download the agent's mobile app
- To save the QR code to your computer, right click and save image as
- The QR code is great to include on the back of business cards and other print material

Changing the Contact Information on the App

All contact information pulls from section 1.2 of the eAgentC site backend. Any information changed in this section will take 72 hours to populate onto the mobile app, as long as the Wolfnet IDX is activated for the agent. **Typically, changes will not populate onto the app until Wolfnet IDX is fully activated.**

To make changes to contact information:

1. Login to mykw.kw.com
2. Click the + to the right of myMarketing on the top, center eEdge Control Panel box
3. Manage eAgentC site
4. Select 1.0 on the left hand side menu
5. 1.2 Edit Contact Info

* A question we receive frequently from agents is, "what is my username/password to login to the app. Agents do not login to the app directly. The login on the app is for clients only, to create an account to view their saved listings. Any changes to the app can be done directly from myKW, per the instructions above!

Adding Agent's Headshot to the App

The headshot for the mobile app pulls from the Whitepages. It will take the headshot 72 hours to populate on the app once it is added to the Whitepages, as long as the agent's **Wolfnet IDX is fully activated.** The headshot will only appear on the app in 2 main places: When the app is originally launched on the mobile device and in the My Agent section of the app. The headshot does not appear on the bottom of the app at this time.

Updating App to New Market Center on Transferring Agent's Phone

When an agent transfers to a new market center, they will receive a whole new mobile app URL to start sharing with their clients. If the transferring agent already has the mobile app downloaded to his/her phone, they will need to take the below steps to switch their market center affiliation on the app:

1. Open the app on the agent's phone
2. Click the menu icon on the top left of the app home screen
3. My Account
4. Click 'Agent Search' in small gray lettering
5. Search agent's first/last name and click 'Search for Agent' on the very bottom of the page
6. Two profiles should display for the transferring agent, one for each market center. Select the new market center profile.
7. Slide the ticker from no → yes under 'Make this my agent'

How Agent's Receive Leads From the Mobile App

Agent's receive leads from the app to the myLeads section of their eEdge Control Panel. Agents receive the lead when the customer **creates an account on the app** to save their favorite home listings, make notes on listings, etc. It is important to note that the agent does not receive leads from the app if a customer simply downloads the app to their phone. An account must be created by the customer for the agent to receive the lead information.

- It is also very important to note that Wolfnet IDX must be activated for clients to be able to create an account on the agent's mobile app. Essentially, an agent cannot capture leads from the mobile app unless the Wolfnet IDX is fully activated.

View the Number of Times Your App Has Been Downloaded

Agents can view a report on how many times their mobile app has been downloaded. This report does not show the agent any lead information on *who* has downloaded the app, simply the number of times it has been downloaded. To view this report:

1. Login to mykw.kw.com
2. Click 'Reports' on the top left of the myKW homescreen
3. Hover over 'Reports' on the top toolbar
4. Rankings
5. Agent Mobile Downloads

The agents number will be at the very top of the page, highlighted in gray.

The Best Ways to Share the App

- It is great for agents to have the app installed on their phone to be able to share the app directly from their phone! Once the app is installed on their phone, they will want to make sure that the agent's first and last name is displaying on the bottom of the app. They can then click 'Share App' on the app homescreen to share the app URL via text, email, Facebook or Twitter.
- Add the app URL to the agent's email signature
- Add the mobile app URL to the agent's Placester website (Click Here to have that done.)
- Activate the mobile app email drip campaign within eEdge

Dotloop

How to Grant Admin Access in Dotloop

1. Login to an **admin Dotloop account**
2. Click on the 'People' icon on the top right, black toolbar
3. Click your market center's name on the left side in red
4. Use the search bar to search for the staff's name (or click +Add Person, if staff is not already connected to office Dotloop account).
5. Click the 3 drop down dots to the far right of the staff's name
6. Make Admin

Next time that the staff logs into their Dotloop account, a pop-up will appear letting them know they've been given an admin profile. They will be able to toggle between their personal and admin Dotloop profiles by hovering over their initials/headshot on the top right of their Dotloop account. This will also allow the staff member to see all of your agents' loops from their Dotloop homepage!

Connect Agents to Your Market Center in Dotloop

In order for the agent's Dotloop account to function properly, it is very important that the agent is connected to your office Dotloop account. This will allow the agent access to all the forms needed for their transaction and gives them all the Dotloop premium features. Typically, you will want the agent's Dotloop account to be

black/red with 'Premium' written next to the KW logo on the top of the Dotloop account. This indicates that the agent's Dotloop account is setup properly. If the agent's Dotloop account is a light blue, they will need to be connected to your market center via one of the below methods:

Add Agent Via Dotloop Invitation Code

1. Login to the agent's Dotloop account
2. Hover over the agent's initials/headshot on the top right
3. My Account
4. Click 'Profiles' on the left side and make sure the correct Profile is select
5. Scroll down to the 'Company and Associations' section and click 'Add Company'
6. Enter in the city, state and start typing in 'Keller Williams' in the 'Add Company Name' field
7. Dotloop will suggest different KW offices in your city, make sure to select the option with your address and **(Verified)** next to your brokerage name → Continue
    - Tip: If the brokerage name runs off the page and you cannot see 'Verified', hover your mouse over the option and it will pop up the full description
8. Typically, you will then be prompted for your office invitation code → Confirm
    - Click here for instruction on how to find your Dotloop invitation code

The agent will now be added to your office Dotloop account!

Add Agent Via Admin Dotloop Account

1. Login to Admin Dotloop Account
2. Click 'People' icon on the top right, black toolbar
3. Select 'Contacts' on the left side in red
4. Click '+ Add Person' above your contact list
5. Add name, email address and role and select 'Add Person' button

Next time the agent logs into their Dotloop account, they will see a pop-up notifying them of being added to your market center!

How to Find Your Dotloop Invitation Code

1. Login to your Admin Dotloop account
2. Hover over your initials/KW logo/headshot on the top right toolbar
3. Select 'Profiles' on the left side in red and make sure the correct profile is selected
4. Scroll near the bottom of the screen to find the 'Invitation Code' field

Adjust Frequency of Dotloop Notification Emails

As an admin, you may be receiving a landslide of email notifications from Dotloop. To adjust the amount of emails your receive from Dotloop:

1. Login to your Admin Dotloop account
2. Hover over your initials/KW logo/headshot on the top right toolbar
3. Select 'Profiles' on the left side in red and make sure the correct profile is selected
4. Scroll down near the bottom of the screen to find the 'Notification Settings' section
5. Make sure to save on the bottom of the screen if you make any adjustments

Adding Forms to the Templates Section of Dotloop

As an admin, you are able to add form templates into Dotloop, so that all of your agents can access those forms right from their Dotloop account!

1. Login to your admin Dotloop account
2. Click on the Templates icon on the top right, on the black toolbar (Icon of two sheets of paper)
3. Click 'Documents' on the left side in red
4. You can click to create a new folder or select a folder on the left side to add new forms to
5. Click 'Add a Document' on the top right in red to start adding documents to that folder

How to Create a Greensheet

There are two main ways to create a Greensheet from an agent's account: from Dotloop and also from the myKW homepage.

Greensheets in Dotloop

The benefit of submitting to Greensheet from Dotloop, is that some of the property information will pull from Dotloop and auto-populate onto your Greensheet. To do this:

1. Login to an agent's Dotloop account
2. Click on the loop in need of a Greensheet
3. Click 'View Details' on the top of the loop under the loop name
4. Click 'Submit to Greensheet' on the top right

Common errors:
*Pop-up blocker will need to be turned off for Dotloop for the Greensheet to display. If it says 'Please Wait' for an extended period of time, check to make sure your pop-up blocker allows pop ups for Dotloop and click again.

**If an error message displays, saying “Invalid Credentials. A Keller Williams eEdge Account is required to submit to greensheet”. Make sure you are access Dotloop via myKW. If so, Dotloop will need to be called to fix this up right away: 513-257-0558

Greensheets from myKW

If an agent is unable to submit a Greensheet from Dotloop, this can also be done from the myKW homescreen!

1. Login to mykw.kw.com
2. Hover over ‘Technology’ on the top black toolbar
3. Greensheet
4. Create a Greensheet

Turn on Auto-Approval for Greensheet Compliance

1. Login to an admin mykw.kw.com account
2. Scroll to the bottom right of the page to select ‘White Pages’ from the Quick Links box
3. ‘Find/Edit Offices’ on the left side menu
4. Search your office number
5. Scroll down to select ‘Yes’ next to “Turn on Auto-approval for Greensheet Compliance”

Accessing Online Greensheets from MCA Account

1. Login to MCA myKW account
2. Hover over ‘Technology’ on the top, black toolbar
3. Greensheet - MC Approval
4. Select ‘Find a Greensheet’
5. Search by agent name, GS ID, Address, etc.

Career Growth Initiative (CGI)

The Career Growth Initiative was introduced in Summer 2015 as an extension of the Growth Initiative that Team Leaders have been using since 2011, 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, which Associates are automatically signed in to if they are signed in to mykw.kw.com

Generate Class Code

While logged in as leadership, you can go to cgi.kw.com and click "generate class code" to do a code for that day (code expires every 24 hours, part of the code is the date that it was generated). You can also go to "Agent List" and click on an agent's name to set the goals for that agent.

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.

Using Scott Le Roy Marketing Services

Agent On Boarding

Submitting a Questionnaire for New Agent Setup

When a new agent joins KW they will then fill out a short questionnaire on our website. Once this is completed we will set them up with their myKW account within 1-2 business days (pending they have the correct username and password included).

1. Go to reagentsetup.com
2. Put in your Market Center number to access the questionnaire
3. Agents must fill in all fields that say *Required. All other information can be emailed over to us at a later time to update!
4. Click to Send the questionnaire at the bottom of the page. You will see a confirmation page display, confirming that we received the questionnaire!

Note: We will need the agent's myKW username/password to get them all setup! Please allow 1-2 business days for the setup to be completed.

How to Best Get Your Agents to Submit a Questionnaire

We have found 3 best ways to successfully have your agent submit a questionnaire to us, to have their KW technology setup and optimized.

1. Once a new agent has been onboarded, send an email to support@scottleroymarketing.com with the agent's personal email address for us to send the questionnaire directly to the agent. We will copy the staff on this email so you can see that the questionnaire was sent off! If the agent does not fill out the questionnaire within 2 days, we will resend the questionnaire to the agent and copy the staff once again, to keep you in the loop!
    - **Note**: When an agent is entered into WinMORE for the first time, the agent's default myKW username/password is auto-generated and sent to the MCA's email address. It can drastically help speed up the setup process if this original login information is forwarded to us with the agent's personal email address, for us to keep on file.
2. If you would rather send the questionnaire to your agents directly, feel free to do so, by emailing a link to our questionnaire (reagentsetup.com), along with the password to access the questionnaire, which is typically your market center number.
3. Sit with your agent while they fill in the questionnaire during your initial on boarding meeting. Agents will have many questions about their tech tools, so it may be beneficial to sit with your agent as he/she completes the questionnaire. This also helps ensure that they are filling out the questionnaire so that they can be set up with their KW tech tools ASAP!

Access All of Our Questionnaires - Transfer Agents, Cappers, etc.

We have 7 different questionnaires to best suit your agents' needs! The include the standard Setup Questionnaire, Fast Start Setup, Transferring KW Agent, Expansion Agent, Capper, Admin and Placester. To access those questionnaires:

1. Go to scottleroymarketing.com
2. Hover your mouse over KW Resources on the menu
3. Questionnaires
4. Enter in your Market Center number when prompted

KW Tech Tools Setup During This Process

- Activate eEdge Control Panel
- Change myKW Password
- Check the List Hub Box in the KWLS (if applicable)
- Submit the Request for the KW.com Email
- Profile Completion to 100%
- Update 1.2 Section on the eAgentc Website for the APP to update
- Update 2.4 Hosting Section on the eAgentc Website for the agents placester website (or custom website if specified)
- Update 4.2 Section on the eAgentc Website to Display MLS Listings
- Update 4.5 Section of the eAgentc Website for the Agent APP Info
- Update Admin/ My Account (Phone, Email, Website, APP Info, etc)
- Add Headshot and Logo to Admin/ My Account Section
- Update Time Zone Information under General Info
- Select Modern Landscape Theme for the eEdge Website
- Add in the KW Logo and Landscape Banner Image
- Add up to 10 Communities Served
- Activate DotLoop
- Connect DotLoop to the Market Center Account
- Send off IDX Paperwork (If Applicable)
- Activate HomeKeepr Profile
- Activate Inman Select Profile
- Activate and Setup Placester Website (If Available On Setup - Please Notify SLM Once Available To Have This Site Setup)

How Will We Be Notified of the Setup Completion

Once completed, they will receive an email with all of their information on file including:

- Login to mykw

- DotLoop Login
- eEdge Website
- Placester Website (If Available At Time Of Setup)
- Email Addresses
- App Information
- Profile Information
- HomeKeepr Login
- and more

What to Do if You Receive a “Placester Unavailable - Agent Name” Email

The Placester website will not launch until the agent’s KW email is created (which we take care of during setup) and the MLS ID is entered into the Whitepages. When sending an agent’s initial Setup Complete email, we have also started sending a second email to staff only, to let you know that the agent’s Placester website is not available and how to get this to launch. If you receive the “Placester Unavailable” email, follow the below steps:

1. Login to an admin myKW account to add the Whitepages to the MLS (Click here for instructions on how to do this. This can only be done from an admin myKW account, which is why we are unable to do this during the agent’s setup).
2. Once this is done, reply back to the “Placester Unavailable” email to let us know this has been completed. This will automatically launch the agent’s Placester site within 24-48 and at that time we will be able to setup the agent’s Placester site for them!

This process ensures that all agents’ Placester sites are launched and setup as quickly as possible so that they can use this website address for their business cards!

What Do Agents Do After Being Setup? - New 30 Day Challenge

Oftentimes agents get setup and feel uncertain about what to do next. To answer this question, we have also launched a 30 Day Challenge to get agents to utilize our services and setup even more once they are up and running. This will include items like:

- Coming to our 3 Hour Training Class
- Buying and Moving a Domain to their website
- Sending over their contacts to add to the database
- 100% Profile Completion
- Setting up and email campaign
- AND MORE

DOWNLOAD THE 30 DAY CHALLENGE HERE

Note: This can also be downloaded in a paper copy and viewed right away from scottleroymarketing.com → KW Resources → Questionnaires → 30 Day Challenge

Find the Status of Your Agent's Setup

Our ultimate goal in 2017 is to keep the office informed at all times on who has sent in a questionnaire. With that being said, we have four ways to stay informed 24/7. To find out if your agent has submitted a questionnaire and the status of the setup, we have created a Questionnaire Queue and SLM Tracker!

1. Utilize the custom questionnaire and let us know who would like to receive the original questionnaire email that our staff receives
2. Check the questionnaire queue
3. Check the questionnaires that were completed the day prior
4. Access our SLM Tracker to view the time and date questionnaires are submitted in real time

Questionnaire Queue

To ensure we have received your agent's questionnaire, completion status and if we are missing the agent's myKW username/password, this can be viewed right away on our Questionnaire Queue! The Questionnaire Queue is updated every morning when we open.

1. Go to scottleroymarketing.com
2. Hover over KW Resources
3. Questionnaires
4. Questionnaire Queue

SLM Tracker

View which agents have submitted setup and support questionnaires in real time for your Market Center specifically:

1. Go to scottleroymarketing.com
2. Hover over KW Resources
3. Leadership Support
4. SLM Tracker
5. Enter in your Market Center number

Note: The Training Tracker can be viewed from this page as well! Click the blue link near the top of the page to view which agents are attending our live training classes.

SLM Live Webinars and Training

How to View Live Training Classes

All agents may attend any of our online LIVE webinars that occur weekly. The myKW Academy is every Tuesday, Placester classes are every Wednesday and the advanced webinars are every Thursday. The training calendar can be found on our website 24/7 under the KW Resources tab. To log in to the webinars, please visit:

www.eEdgeAcademy.com

How to View Recorded Training Classes 24/7

If you agent cannot attend our live training sessions, no problem! We record all of our training sessions and can be viewed 24/7 from our website and the below links:

www.slmwebinar.com (myKW Academy Webinar) - This is a great place to direct your new agents! This is a complete overview of their KW technology that can be viewed in a 3 hour class or a sped up 1 hour overview.

www.slmtraining.com (Previous Advanced Training Classes) - Great classes for agents looking to learn more about Dotloop, Placester, the eEdge database, etc.

www.slmtips.com (myKW Tips) - Quick tip videos on how to optimize your KW technology

View the Live Training Calendar

Download Our Current Flyers Right Here:

www.scottleroymarketing.com//training-calendar

Our live training Calendar can be viewed on our website anytime:

1. Go to scottleroymarketing.com
2. Hover over KW Resources
3. Training
4. Training Calendar to view and download your time zone's calendar right away!

myKW Tech Support

All agents in the market center may contact us with any issues, questions or concerns on the myKW platform. This includes, eEdge, DotLoop, myKW, kw.com email, etc. We do prefer email and have a goal of responding within 1-5 minutes. Our office hours are M-F from 9 am - 6 pm ET. If you call and we are on the other line, please leave a voicemail to have a call returned immediately.

support@scottleroymarketing.com
321-236-2568

Free Technology and Marketing Services

We offer a wide variety of support services, where we actually complete tasks for your agents! A list of all of the Support items we are happy to help with can be found on our website:

1. Go to scottleroymarketing.com
2. KW Resources
3. Support

If an agent is interested in us completing any of the items on this list, they simply have to click on the item and fill out the short form that appears. All support requests are completed within 1-2 business days. These can be view directly via the link below:

www.scottleroymarketing.com/support
password: Your MC Number

Importing Contacts

One of our most popular services that agents take advantage of, is importing contacts into their eEdge database. To do this, we just need an excel spreadsheet (CSV file) of the contacts and we can reformat the contacts to properly import into eEdge!

For a list of instructions on how to export your agent's contacts from various platforms, such as their cell phone, social media account and email account, click the link below to view those right away!

scottleroymarketing.com/exporting-contacts

Off Boarding

Although we don't like it when an agent leaves Keller Williams, we want to make sure they leave on a positive note. To make this as pleasant as possible we also help out with the off boarding process. When an agent leaves they will fill out a short form to allow us to help with the following:

Deactivate Online KW.com Profile
Deactivate eAgentc Website
Export Contacts to CSV file
Deactivate All Email Campaigns
Disable Placester Website

Please have the agent fill out this short form before they are taken out of the white pages:

www.scottleroymarketing.com/leaving-keller-williams

This can also be found on our website by:

1. Hovering over KW Resources
2. Leadership Support
3. Offboarding

Note: We have a printable from available as well! Please email us and we can send this over right away.

Free Leadership and Office Services

We are proud to announce that we now have a dedicated section of our website just for the office leadership. This section of our site is meant to provider a one stop area for all things free to utilize for the office staff.

To access this:

1. Go to scottleroymarketing.com
2. KW Resources
3. Leadership Support

Included in the Leadership and Office Support will be:

- Office Placester Website Setup
- Recruiting Website Setup
- Free Email Signature Creation (from our templates)
- Tracking of Online Form Submission (Questionnaires) and Training
- Basic Email Campaign Setup

- Setting Up of Google Analytics for Placester Website
- Setting Up of Google Webmaster Tools for Placester Website
- Setting Up of Bing Webmaster Tools for Placester Website
- Importing of CSV Databases
- List Hub Exceptions Report Audit
- Team Meeting Custom Videos

AND MORE

Steps to Implementing SLM in Your Market Center

We have created a 30 days challenge with steps on how to effectively implement SLM services in your market center! We want to get all of your agents utilizing our services as much as possible, so these steps will help push toward that goal!

www.scottleroymarketing.com/launch

Note: This can also be downloaded in a paper copy and viewed right away from scottleroymarketing.com → KW Resources → Leadership Support → 30 Day Launch

SLM Marketing Templates

After months of planning, we are officially launching our new templates section. Each month we will be including 100 more templates for the Market Center Leadership and Agents to utilize.

These templates are meant to be complimentary to the eEdge templates and are based out of the Google Apps platform. We have created these on an easy to use platform that will work on either Mac or PC. All you need to access the templates is a KW.com email or Gmail.com account.

To find the new templates, please visit:
www.scottleroymarketing.com/templates

Email Signature Templates

One of most requested templates we get is for our email signature templates. These can be viewed and created by agents right from the link above! There is a video on the top of the page that will walk them through how to set this up right away.

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 Academy 3 Hour and 1 Hour Training

www.EEDGEACADEMY.com (1pm EST 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 and Marketing Courses (available 24/7)

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

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