



## **IXACT Contact® User Guide**

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## Welcome to IXACT Contact

### Introduction

Thanks for choosing IXACT Contact and congratulations on your decision to get started with our system!

IXACT Contact is an amazingly easy to learn and use web-based real estate CRM and marketing automation system. It's designed to help you stay organized and build lasting relationships with past clients, hot prospects, and important referral sources. With IXACT Contact, keeping in touch and staying organized is a breeze!

IXACT Contact's CRM is endorsed by leading real estate sales trainers and used by thousands of satisfied real estate agents across North America.

The IXACT Contact Teams version is capable of supporting the needs of real estate teams of all sizes and types. For more information, see [About Teams](#).



*Throughout this help guide, information specific to teams is shown in this format with this icon next to it.*

### Why you'll love IXACT Contact:

- It's very easy to learn and use. Being computer or tech savvy isn't a requirement!
- It includes real estate CRM software, a powerful email marketing system with Campaign Reporting, an automated monthly e-Newsletter, mobile-friendly agent websites, and automated social media marketing, all in one! No need to pay for and manage four separate solutions.
- We can upload your contacts for you and help you get everything set up so that you're seeing real business value as quickly as possible.
- Customer Support is free and unlimited. You can call or email our friendly Customer Support Team anytime you need help. IXACT Contact is known for our world-class support.
- It includes a mobile app for iPhone and Android, and it syncs wirelessly with Gmail using Google Sync, with Outlook and Mac applications, and also with your smartphone's address book and calendar apps.
- It's 100% Mac and Safari compatible and works perfectly on your iPad and other tablets.

### Getting started is easy!

1. The easiest way to get started with IXACT Contact is to take advantage of the Setup Wizard, which you can start after logging in. The wizard will take you through all the important setup steps so you can start getting immediate value from the system.



2. If you have a list of contacts that you want to import into your IXACT Contact account, you can either use the self-serve import feature, or you can email your contacts file directly to [support@ixactcontact.com](mailto:support@ixactcontact.com) and we'll let you know when your contacts have been uploaded into your account. If you need help exporting your contact list from another system, you can call our Customer Support Team at 1-866-265-6990 (Mon-Fri 9:00am-8:00pm EST).
3. Check out our tutorial videos at [www.ixactcontact.com/realtor-resources/#menu-case-studies](http://www.ixactcontact.com/realtor-resources/#menu-case-studies) or read through this help guide.

Like us on [Facebook](#) and follow us on [Twitter](#)! We run exciting social media promos and you don't want to miss out!

## How the Screen is Arranged

The IXACT Contact screen is presented as follows:

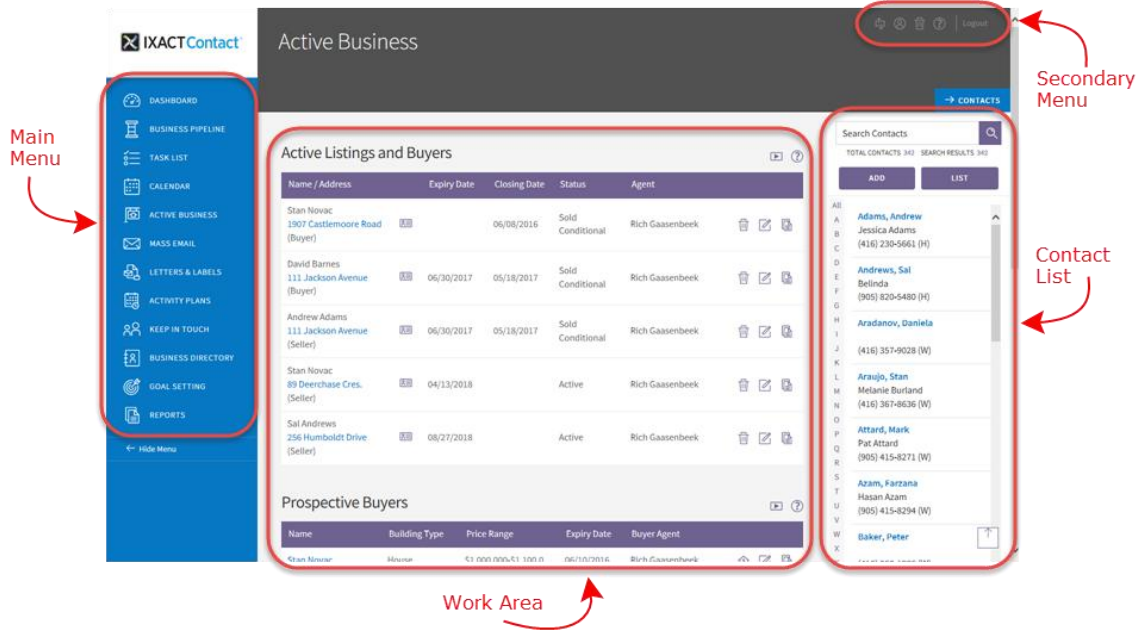
- Down the left-hand side is the *main menu*, which allows you to open the various functions into the work area.
- On the right-hand side is the Contact List, which is available at all times. Click on a contact to view the details in the work area. For more information, see [Using the Contact List](#).
- In the top right corner is the secondary menu, which includes functions to set up the system.
- The rest of the screen is the *work area*. This shows your data, and changes according to the function you have chosen from the main or secondary menus.

**Note** Whatever function you click will change what is shown in the work area; be sure to save your work before changing to another function. If you have unsaved changes, you will be prompted to confirm if you want to Continue to the other function anyway, or Cancel so you have a chance to save your changes first.

**Tip** Press the **F11** key at any time to change your Internet browser to full-screen mode. This will hide your browser menus and toolbars and allow you to take advantage of more screen space. Press the **F11** key again when you need to bring back your menus and toolbars.

## Why is some text blue?

Text that is blue is a link to open further information or access another function. For example, if you click a contact name link in the Contacts List (in the right column), the contact's record opens in the work area. If you click Modify List beside a field, another screen opens where you can change the selections available for that field.




## Customizing Your Dashboard



Your Dashboard is a customizable snapshot of business, and it's what you see first each time you sign in to IXACT Contact.



The Dashboard includes a number of predefined "widgets" that display key reporting metrics and activities.

You can select any or all of these widgets, and display them in which ever order you wish depending on how you manage your business and what information is most important to you.

The following widgets are available:

WIDGET	DESCRIPTION
<p>Prospecting Activities</p>	<p>Provides a summary of the prospecting activities you carried out during the last week, the current week and year-to-date, and, if you have set up your goals for the year (see <a href="#">Entering Your Goals</a>), how you are performing against your goals. The YTD to Goal numbers are color-coded to provide quick visibility to where you are reaching your goals and where you are not.</p> <div style="display: flex; align-items: center; margin-top: 20px;">  <div style="color: #e67e22;"> <p><i>The Team Leader or administrators can use the Team Member list to display results either for the entire team, or for an individual team member based on contact visibility. Team members who are not administrators can only see results for their own contacts.</i></p> </div> </div>

WIDGET	DESCRIPTION
Active Business Snapshot	<p>Provides a real-time snapshot of the transactions you currently have on-the-go in Active Business, broken down by transaction status.</p> <div style="display: flex; align-items: center; margin-top: 10px;">  <p style="color: #C07040; font-style: italic;">The Team Leader or administrators can use the Team Member list to display results either for the entire team or for an individual team member based on contact visibility. Team members who are not administrators can only see results for their own contacts.</p> </div>
Closed Business	<p>Displays a number a key transactional metrics of your business for the current calendar year. If you have set up your goals for the year (see <a href="#">Entering Your Goals</a>), the report shows how you are performing against your goals. Numbers are color-coded to provide quick visibility to where you are reaching your goals and where you are not.</p>
Original Source Reporting	<p>Displays pie charts that highlight your best sources of new contacts and closed business, based on the Original Source selections on your contact profiles. The report can be generated for a number of different timeframes by using the Time Frame selector above the report.</p> <div style="display: flex; align-items: center; margin-top: 10px;">  <p style="color: #C07040; font-style: italic;">The Team Leader or administrators can use the Team Member list to display results either for the entire team or for an individual team member based on contact visibility. Team members who are not administrators can only see results for their own contacts.</p> </div>
Active Listings and Buyers	<p>Presents a list of your current Active Business, with the ability to click a property address to go directly to the Active Business listing or sale page.</p>
Prospective Buyers	<p>Displays a list of contacts that are currently set as Prospective Buyers, with the ability to click the contact name to go directly to the Contact Profile Buying Preferences page.</p>
Today's Tasks	<p>Provides a list of your tasks that are either due today or overdue, with the ability to complete tasks, or click the task Subject to open the full task page.</p>
Today's Appointments	<p>Displays a list of your appointments for today. You can click on the appointment Subject to open the full appointment page.</p>

WIDGET	DESCRIPTION
Business Pipeline	<p>Provides a breakdown of your contact database by status. Click <b>Business Pipeline</b> in the main menu to access all the functions of the Business Pipeline (see <a href="#">Using the Business Pipeline</a>).</p>  <p><i>The Team Leader or administrators can use the Team Member list to display the breakdown for either for the entire team, or for an individual team member based on contact visibility. Team members who are not administrators can only see breakdown for their own contacts.</i></p>
Referral and Repeat Business	<p>Provides a snapshot of the listings, transactions and commissions that are coming from referral and repeat business. Referral business is based on contacts with an Original Source of Referral. Repeat business is based on active business transactions flagged as repeat business. The report can be generated for a number of different timeframes by using the Time Frame selector above the report.</p>  <p><i>The Team Leader or administrators can use the Team Member list to display results either for the entire team or for an individual team member based on contact visibility. Team members who are not administrators can only see results for their own contacts.</i></p>

To customize your Dashboard, simply click **Customize Dashboard** at the top of the page, and select the check boxes of the widgets you would like to see. Widgets that you add are automatically added to the top of the page. While in "customize" mode, you can move widgets around by clicking the widget and dragging it to the position you want it on the page. When you are done customizing your Dashboard, click **Save Customization**.

**Note** If you take advantage of the [Keep in Touch Coach](#) feature, the widget will always display at the top of your Dashboard. The widget cannot be hidden or moved.



*Each Team Member can opt to hide the Keep in Touch Coach widget by unselecting Enable Dashboard Widget when [Setting Up Your Keep in Touch Options](#).*

## What Do I Do First?

We have designed IXACT Contact so that nothing needs to be configured and no training is required for you to get started. We encourage you to jump right in and start using all the valuable easy-to-use features.

However, here are some of the things that you should consider doing when getting started with IXACT Contact:

- Change your password to something you can remember (see [Changing Your User Profile Settings](#)).
- [Import Contacts](#) from another software program
- Set up your email header (see [Setting Up Your Email Header](#)) and create a signature for your emails and letters (see [Creating a Signature for Your Emails and Letters](#))
- Set up your Monthly e-Newsletter (see [Customizing the Current Monthly e-Newsletter Issue](#))
- Set up your default letter margins (see [Changing Your User Profile Settings](#))
- Sign up for our Wireless Synchronization Service in order to synchronize your IXACT Contact information with your iPhone, Android, or other smartphone
- Set up website lead capture (see [Capturing Leads from Your Website](#))

## Common Functions

### Entering Data

You will enter data using several types of fields:

- Text fields have no arrow; you can enter whatever you want in these fields.
- Drop-down lists have an arrow at the right side. Click the arrow to select one of a defined list of choices.
- Radio buttons are a group of choices; you must pick one. Click on a radio button to select it. To change your selection, click on a different radio button in the same group of choices.
- Check boxes are another group of choices, but you can pick as many as you want (or none). Click on a check box to "select" it; click on it again to "clear" it.

**Note** Sometimes you will see a **Modify List** link next to a drop-down list or group of radio buttons or check boxes. This allows you to control what the available choices are. For more information, see [Modifying Lists](#).

The screenshot shows a form titled "SELECT THE MONTHS THAT YOU WISH TO AUTOMATICALLY SEND YOUR E-NEWSLETTER". It contains several sections:

- Month Selection:** A grid of 12 months with checkboxes. January, March, May, July, and September are checked. A red box highlights the first column (January, February, March, April) with an arrow labeled "check boxes".
- Day Selection:** A section titled "SELECT THE DAY OF THE MONTH YOU WISH TO AUTO-SEND YOUR E-NEWSLETTER". It has two radio buttons: "Day 1 of each month" (selected) and "The First Sunday of each month". A red box highlights the radio buttons with an arrow labeled "radio buttons".
- Auto-Send Time:** A section titled "AUTO-SEND TIME" with a time field set to "12:NaN PM" and a clock icon. A red arrow points to the time field with the label "drop-down list".
- Calendar and Reminder:** Two checked checkboxes: "Include in calendar" and "Send a reminder 0 Days before".
- Default Email Subject:** A text field containing "Your Monthly Real Estate Update". A red arrow points to it with the label "text field".
- Email Header:** Two buttons: "INCLUDE" and "EXCLUDE". A red arrow points to them with the label "buttons".

### Adding vs. editing vs. deleting information

For the most part, the procedures in this help file describe how to add information.

To edit information, you open the existing record, make your changes, and click **Save**.

Each record can also be deleted by clicking a **Delete** button or link. All deletions are confirmed with a pop-up message. Nothing is deleted until you click **Yes** to confirm the deletion. Individual delete functions are not discussed in this help file unless deleting information has implications elsewhere.

Some information can be restored if you delete it in error; for more information, see [Using the Recycle Bin](#).

## Modifying Lists

Many lists, whether they are part of a drop-down field or a group of check boxes, can be edited to suit your needs. For example, you would probably want to customize the contact groups you use, or perhaps the business types that are used to categorize and filter entries in your Business Directory.

When you customize a list, the changes are reflected anytime that list is used. For example, if you customize the Contact Groups list from with the Contact Profile screen, the new groups are shown wherever you see contact groups in IXACT Contact.

To customize a list:

1. Click the **Modify List** link beside the field.
2. To add an entry, type in the text field at the top and click **Add**.
3. To change an entry, click the **Edit** icon beside the entry. The entry name appears in the text field at the top. Change it as required and click **Update**.
4. To remove an entry, click the **Delete** icon beside the entry.
5. When you are finished, click **Close**.

**Note** Some drop-down lists include a blank entry which allows you to clear a previous selection. You cannot delete this blank entry.

### What if a list item I delete is still assigned to records?

If you delete a list item that is still assigned to one or more records (e.g. you delete a Business Type that is still assigned to one or more contacts), the list item remains assigned to the record(s), but now includes "(Not on Master List)" as part of its name.

If you click Modify List while looking at a record that uses that list item, you can click the **Add** icon next to the entry at the bottom of the list to add it back into the list.

For example:

- You have modified your Business Type list to add "Landscaper".
- Your contact Joe Fleming is assigned that business type.
- Later you modify the Business Type list to delete Landscaper.
- When you view Joe's contact profile, the **Business Type** field now says "Landscaper (Not on Master List)".
- When you click **Modify List** beside **Business Type**, there is an entry for "Landscaper (Not on Master List)" at the bottom of the list with an **Add** icon beside it.

## Selecting Contacts

There are many places in IXACT Contact where you need to **Select Contacts**; for example, when you are creating an appointment, mass email, letter, or Keep In Touch event.

The Select Contacts screen allows you to perform a *simple search* on the names in your contact list, or to perform an *advanced search* that lets you choose contacts based on any combination of contact status, contact groups, various date criteria, those with active business, religion, original source of contact and more.

### Selecting contacts using the advanced search

The advanced search screen is the one that opens when you first click **Select Contacts**.

To select contacts using the advanced search:

1. Select the criteria to filter your contacts. You can choose from any combination of the sections. To make choices in a section, click the arrow at the right of the section header to expand it.
2. Click **Execute Search**.
3. The contacts that meet all of your criteria are displayed on the next screen. By default, all displayed contacts are selected. Clear the check box for any contacts you want to exclude.
4. Click **Select Contacts**.

### Selecting contacts using the simple search

To use the simple search option, click the **Simple Search** button at the bottom of the Advanced Search popup. (Click **Back to Advanced Search** if you wish to return to the advanced search.)

To select contacts using the simple search:

1. Show the contacts that you want to choose from:
  - Click **All** at the top to show all contacts; or
  - Click a letter at the top to display all contacts whose last name starts with the letter, or, if no last name is entered for a contact, whose company name starts with the letter; or
  - Enter one or more characters in the search field and click the magnifying glass icon to show only contacts that contain those character(s) in their first or last name, home address fields, or company name.
2. Select the contacts as required:
  - Check the box for each contact you want to include, or
  - Select the check box at the top of the list (beside Name) to select all contacts, and then, if necessary, clear the check box beside the contact name(s) that you do not want.

You can select one or more contacts returned by a search and perform additional searches and selections without losing your prior selections. The



total number of selected contacts is always displayed. Click **View Selected** at any time to display only your selected contacts.

Select Contacts

All A B C D E F G H I J K L M N O P Q R S T U V W X Y Z Search

Include only contacts with a Preferred Method of Correspondence set to Email

Include Contacts set to NOT Accept Mass Emails (WARNING! Please ensure you are not violating SPAM laws.)

HAVE PROVIDED CONSENT TO RECEIVE EMAILS?

YES NO ALL

Contacts Selected: 2 VIEW SELECTED \* Contact does not accept mass emails

<input type="checkbox"/>	Name	Spouse/Partner	Home Address
<input type="checkbox"/>	.. Adams, Andrew	Adams, Jessica	38 Fred Varley Street
<input type="checkbox"/>	.. Andrews, Sal	Belinda	256 Humboldt Drive
<input checked="" type="checkbox"/>	.. Aradanov, Daniela		12 Angle Court
<input type="checkbox"/>	.. Attard, Mark	Attard, Pat	42 Pomander Drive
<input type="checkbox"/>	.. Azam, Farzana	Azam, Hasan	336 Deer Chase Court
<input type="checkbox"/>	.. Baker, Peter		8 Fazillo Circle
<input checked="" type="checkbox"/>	.. Bardawill, Jon		664 16th Avenue
<input type="checkbox"/>	.. Barker, Scott	Smith, Joanna	58 Foxtan Road
<input type="checkbox"/>	.. Barnes, David		123 Fred McLaren Blvd

1 - 300 of 300 items

ADVANCED SEARCH CANCEL SELECT CONTACTS

- When you have selected the contacts you want, click **Select Contacts** at the bottom of the screen.

## Using the Content Editor

When you create letters or mass emails or set up your branding using IXACT Contact, a *wysiwyg* ("what you see is what you get") content editor provides you with tools for creating robust formatted content.

As you use the editor, behind the scenes it automatically creates HTML programming code (the language of the internet) that represents your formatted content, but the great thing is that you do not have to know anything about programming HTML or even what it is.

The tool includes many of the same features as popular Word processing software like Microsoft Word. If you're not sure what the various features of the editor does, you can hover over each of the toolbar buttons with your mouse and the name of the feature will appear.

The tool includes the following formatting features:

- Text formatting
- Text colors and background colors
- Text justification
- Indenting
- Bullets and numbering
- Hyperlink insertion
- Contact-specific merge field insertion
- Tables

You can also insert your own HTML (by clicking the View HTML toolbar button). A popup presents your content as HTML programming code. This option is intended for users who are either copying and pasting HTML provided by another source (i.e. your web designer) or advanced users who would like to write their own HTML.

## Image Manager

The Image Manager allows you to upload pictures from your own computer and insert them into your emails, letters or personal branding.

The Image Manager also allows you to create your own folders in order to organize the pictures that you upload. The size of each picture you upload cannot exceed 2MB and you are limited to 50MB of overall disk space.



Remember that the bigger the pictures you include in your emails, the longer it will take your email recipients to open and view your emails. Therefore, as a general rule, the pictures you upload and include in your emails should be as small as possible while still displaying properly.

## Using the Recycle Bin

When you delete a contact, a contact's property, an active business listing, or a Keep In Touch event, it is removed from the related list and stored in the IXACT Contact Recycle Bin just in case you need to restore it at a later date.

### Viewing items in the recycle bin

Click the **Recycle Bin** icon in the secondary menu (top right of your screen).

Deleted items are listed in the appropriate tabs with the most recently deleted items displayed at the top of the list.



*If you are a member of a team and the Team Leader has not granted you permission to delete contacts, then the Recycle Bin Contacts tab will not be visible to you.*

## Restoring a deleted item

Click **Restore** beside the item. You are prompted to confirm, then it is returned to the list it came from originally (e.g. the Contacts List, the contact's Properties tab, the Active Business screen, or the Keep In Touch screen).

**Note** A contact's properties, active business listings or contact-specific Keep In Touch events may be deleted independently (and restored separately in the Recycle Bin). However, if an entire contact record is deleted, any properties, active business listings or contact-specific Keep In Touch events do not display in the Recycle Bin and cannot be restored independently. If the contact is restored, all related contact information is restored at the same time.

## Mass restoring contacts

If necessary, you can mass restore up to 100 contacts at a time. To restore more than one contact, either select the check box next to each contact you wish to restore, or use the Select All check box at the top of the list. Then click **Mass Restore**.

## Permanently deleting an item

To permanently delete an item, click the **Delete** icon beside the item in the Recycle Bin. You are prompted to confirm, then it is deleted permanently.

The item cannot be restored. If you need it in the future; you will need to recreate the record.

**Note** Deleted items in your Recycle Bin will automatically be permanently deleted six months after being moved to your Recycle Bin.

## Contacts

### About Contacts

You already know that communicating effectively with past clients, hot prospects and business-to-business referral sources is key to building your business. When you use IXACT Contact to manage your contact information, you can easily:

- Stay in touch with past clients, so you don't miss opportunities for repeat business.
- Determine where your best leads are coming from (advertising? referrals? website?).
- Be reminded to send a thank you note, birthday card, newsletter, email, or other important client communication.
- Communicate effectively with referral sources, so they recommend you more often.
- Follow-up on hot prospects at the right time, so you get the listings and not another realtor.

To do these things and to build lasting relationships with your prospects and clients, you need more than just a contact name and address. The IXACT Contact contact record includes the following information:

- Contact Profile – keeps track of home and work addresses, occupations, email addresses, phone numbers, birthdays, family members, hobbies, special interests and much more. You can even track lead sources. See [Adding a Contact](#) or [Using the Contacts List](#).
- Keep In Touch – allows you to set up birthday reminders, call reminders and contact-specific events, and assign contacts to global events. See [Viewing a Contact's Keep In Touch Events & Activity Plans](#).
- Social Intelligence – automatically gathers and displays up-to-date information from the contact's various public social media profiles.
- Activities/History – displays all pending and completed activities, as well as a history of all notes and prospecting activities entered for a contact, and all letters and mass emails sent to the contact (see [Viewing a Contact's Activities & History](#)).
- Properties – maintains a list of current and previously owned properties, as well as a contact's buying preferences. See [Keeping Track of a Contact's Properties](#).
- Business Directory – shows information from the Work Details section of the Contact Profile tab and allows you to enter other information that is to appear in your Business Directory. See [Adding a Contact to the Business Directory](#).
- Documents – upload and store important documents related to a contact. See [Uploading Documents Related to a Contact](#).

## Using the Contacts List

All of your contacts are listed under **Contacts** in the right column. You can sort your contacts by either last name or first name by selecting the **Sort By** option at the bottom of the list; if no last/first name exists, contacts are sorted by company name.

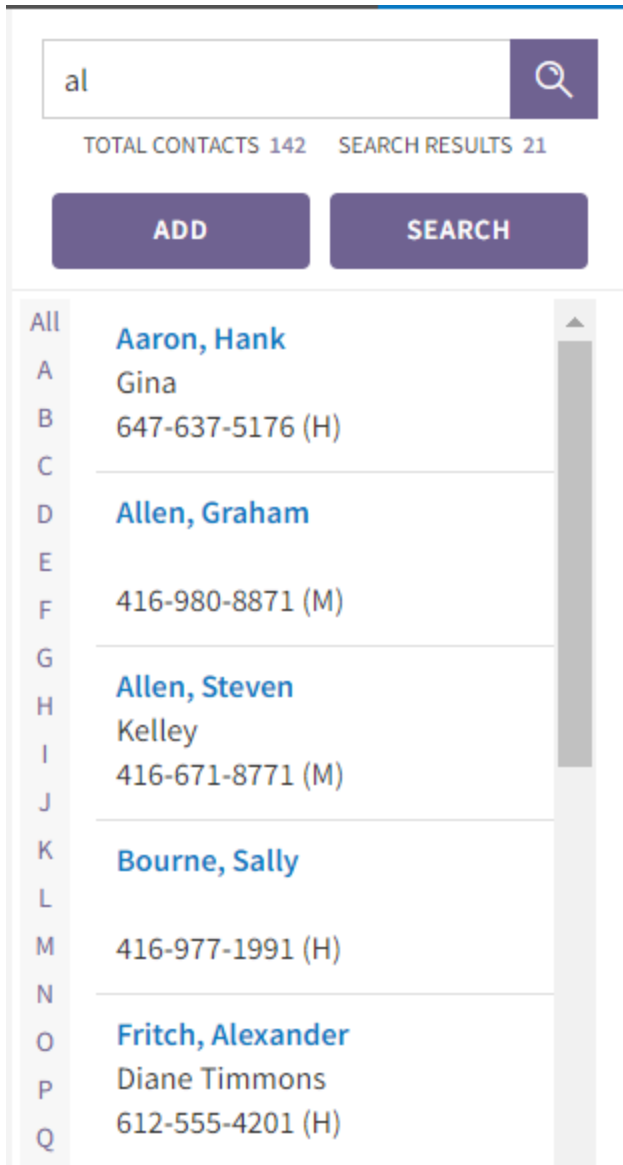
You can hide the contact list to increase the size of the screen working area by clicking the blue button with the arrow above the list. Click the button again to re-display the list.

## Finding a contact

To search for a contact, either click a letter down the side, or enter one or more characters in the search field and press ENTER or click the magnifying glass icon.

If you click a letter down the side, the list is filtered to show only contacts where the first or last name starts with the letter, depending on your selected sort option. If no name is entered for a contact, the list is filtered to show only contacts where the company name starts with the letter.

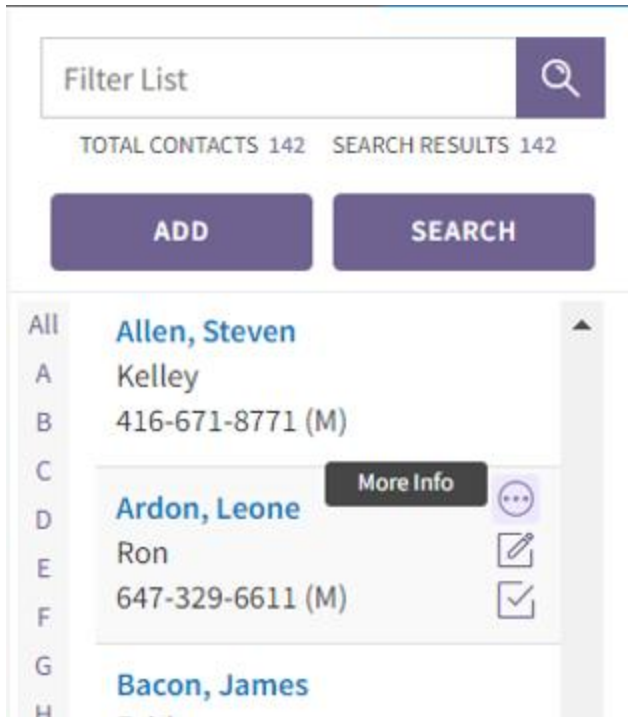
If the search field is used, the list is filtered to show all contacts that contain the character(s) in their main contact or spouse/partner first or last name, home address fields, or company name. You can also search by email address or phone number. The example below shows the contacts that contain "dar".



To show all contacts again, click **All**.

### Viewing a summary of a contact's information

The contact list shows the contact name, spouse/partner name and first phone number, for quick reference. If you want to see additional information (other phone numbers, email address(es), home address) without opening the contact record, hover over the contact in the list, and click the **More Info** icon. (Click the icon again to hide the additional information.)



### Entering a note

To quickly enter a note for a contact, simply click the contact's **Quick Note** icon, enter the note details in the pop-up window and click **Save** to record the note to the contact's Contact History. Upon saving, you are returned to what you were doing before without losing any work or valuable time.

### Entering a task

To quickly enter a task for a contact, click the contact's **Quick Task** icon, enter the details of the task in the pop-up window, and click **Save**. Upon saving, you are returned to what you were doing before without losing any work.



*The Quick Task pop-up includes an Assign To drop-down list for the selection of the team member to which the task is to be assigned. The list includes all team members who are sharing their task list.*

### Opening a contact record

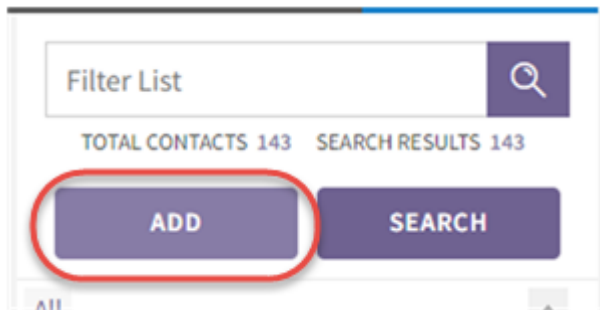
To open the contact record, click the contact's name link. The full contact record (Contact Profile and other tabs) opens in the work area to the left.

## Adding a Contact

**Note** Contacts can be added manually (as described below), [imported](#) from other programs, [captured from your website](#), or [synchronized](#) from your mobile device.

To add a contact:

1. Click **Add** in the right column. A blank Contact Profile opens in the work area.



**Note** You cannot enter additional information until the Contact Profile tab information is entered and saved.

2. On the Contact Profile tab, enter the first or last name of the main contact, or the company name. You must enter at least one of these fields in order to create a contact record. This is how the contact is identified in all lists and reports.
3. Click **Save**. The contact is added to the **Contacts** list in the right column.



While you are only required to enter the first, last, or company name to save a contact record, you should capture as much information as possible in order to realize the full potential of IXACT Contact.

Some fields are required for other functions of the program to work (e.g. to create letters or send mass emails), while other fields help you to categorize your contacts (e.g. to search for all contacts in a particular group, or to create a report of all FSBO prospect types).

The fields are self-evident so they will not be described in detail here, but the following section identifies relationships between fields, or explains where a field is used in other areas of IXACT Contact, or offers suggestions for how you might later use the information.


### What do I need to know about the other sections of the Contact Profile?



Many lists can be customized; see [Modifying Lists](#).



SECTION	YOU NEED TO KNOW:
Personal Email/Letter SetUp	<ul style="list-style-type: none"> <li>The <b>Email/Letter Salutation</b> fields are used in letters and email messages. It defaults to the main contact and spouse/partner first names, but you can change it, for example to a more formal salutation ([Dear] Ms Jordan).</li> <li>The <b>Envelope Salutation</b> is used as the first line anywhere the contact's address is used (e.g. letters, labels). It defaults to the main contact and spouse/partner title, first name, and last name, but you can change it if necessary.</li> <li>If no first name is entered for the contact, the salutation fields default to the title (if entered) and last name. If the contact was created with a company name only, the salutation fields remain blank and you can complete them as you wish.</li> <li>If applicable, select the contact's Preferred Method of Correspondence.</li> <li>If a contact does not wish to receive mass emails, set <b>Accepts Mass Emails</b> to "No". By default, the contact cannot be selected to receive mass emails even if one or more email addresses are entered and <b>Send Mass Email</b> is checked.</li> </ul> <p><b>Note</b> The salutation defaults only apply upon initial entry of the contact; later changes to the name are not automatically reflected in the salutations. However, if you change the name without changing the salutations, when you save the record you are asked if you want to also change the salutations.</p>
Home Address	<ul style="list-style-type: none"> <li>Move In Date is needed in order to activate the Move In Anniversary event for the contact (the year is not necessary).</li> </ul>
Work Details	<ul style="list-style-type: none"> <li>The information entered in this section is copied to the Business Directory tab. (The contact appears in the Business Directory only if the <b>Include in Business Directory</b> check box is selected.)</li> <li>If you want this contact to be searchable by Business Type in the Business Directory, select the appropriate <b>Business Type</b>. Remember that you can <a href="#">modify the list</a> if necessary.</li> </ul>
Phone/Fax/Email	<ul style="list-style-type: none"> <li>Use the drop-down list to identify each phone number type.</li> <li>If you enter multiple email addresses, select the one(s) that you want to send mass email messages to.</li> </ul>
Contact Status	<p>The contact status and prospect type are used for categorizing; they are available in advanced searches and allow you to target reports and direct marketing more efficiently.</p> <p>Note If the contact is a prospective buyer for the purposes of Active Business, that is identified separately on the <a href="#">Properties</a> tab.</p> <p><b>Note</b> The default status for a new manually-entered contact is Unassigned.</p>
Contact Groups	<p>Contact Groups (e.g. Friend, Baseball Team, and Children's School) further categorize your contacts for searches and reports. A contact can be assigned to multiple contact groups.</p> <p><b>Tip</b> You can use <a href="#">List View</a> to easily assign multiple contacts to one or more contact groups.</p>

SECTION	YOU NEED TO KNOW:
Original Source of Contact	<ul style="list-style-type: none"> <li>If the <b>Original Source</b> is Referral, the Referral Contact field will appear to the right. If the person who referred this new contact is in your contact list, click the <b>Select Contact</b> link to select the contact. This referral will be included in the Referral History of the referring contact's profile.</li> <li>If the <b>Original Source</b> is Referral but the contact is not in your contact list, you can enter the name and further details in the <b>Notes</b> field.</li> </ul>
Team Member Visibility 	<ul style="list-style-type: none"> <li>Team Leaders and administrators can control the contact's visibility to each team member.</li> <li>Select <b>Public Contact</b> to make the contact visible to all team members.</li> </ul>
Personal Details	<ul style="list-style-type: none"> <li>Birth Date (main contact and/or spouse/partner) is needed in order to activate the <a href="#">Birthday event</a> (the year is not necessary).</li> <li>The other fields can help you personalize communications with your contacts. For example, use the <b>Religion</b> field to send greetings for a special holiday (or to exclude contacts for whom such a greeting might not be appropriate).</li> </ul>

### What next?

To complete your contact info, you might want to:

- Record any properties the contact currently owns in the [Properties](#) tab.
- Set up any contact-specific events, or assign the contact to Global Keep In Touch events you have created such as your Monthly e-Newsletter, in the Keep In Touch tab.
- If the contact is to be included in your Business Directory, complete the information in the [Business Directory](#) tab.

## Importing Contacts

### Option 1 – Self-Serve

If you have a contact list in CSV format that you want to import into IXACT Contact yourself, you can take advantage of the [self-serve contacts import](#) feature.

### Option 2 – Let us do it for you!

If you would like to have our customer support team import your contacts for you, please email your contacts file to [support@ixactcontact.com](mailto:support@ixactcontact.com). We'll complete the import within one business day and send you an email notification when it's done.



*The Team Leader can authorize each team member to import contacts. An authorized team member can contact our Customer Support team directly in order to have their own contacts imported into the team account. If you are a team member with contacts that you would like imported, and you have not been authorized to import contacts by the Team Leader, you will need to arrange this with your Team Leader.*

## Exporting contacts from another program

**Note** If your contacts are currently in Top Producer, Outlook or Referral Maker, we recommend emailing us your file in order to ensure the most complete and accurate import of your data.

If you need help exporting your contacts from another program, or you have your contacts in Google and would like to take advantage of our Google Sync service to get your contacts into IXACT Contact, or you have other questions, please call Customer Support at 1-866-265-6990. For instructions on exporting contacts from various software programs, see:

- [Exporting Contacts from Microsoft Outlook](#)
- [Exporting Contacts from Top Producer](#) - covers versions 7i and 8i
- [Exporting Contacts from Realty Juggler](#)
- [Exporting Contacts from Wise Agent](#)
- [Exporting Contacts from Gmail](#)
- [Exporting Contacts from Yahoo! Address Book](#)
- [Exporting Contacts from ACT!](#)

## Self-Serve Contacts Import

If you have a contact list in CSV file format, you can import your contacts into your IXACT Contact database by clicking the **Utilities** icon in the secondary menu (top right of the screen) and selecting the Import Contacts tab.

Here are a few things to keep in mind before you begin:

- The file **MUST** be in CSV (comma separated value) format. If your contacts are in an Excel file, you can save the file to CSV format by using the Save As function and selecting 'CSV (Comma delimited)' as the file type.

**Note** Excel will only save the first tab of your spreadsheet to CSV format. If your spreadsheet includes multiple tabs of contacts, you will either need to combine them in one tab or create multiple Excel files.

- Each column in your file should include a single value to be mapped to a corresponding field on the IXACT Contact contact record. Each IXACT Contact field can be mapped to only once.

- You can import multiple Contact Groups for each contact. To do so, the groups must be in a single column separated by commas and wrapped in double-quote characters.
- All date columns must include a month, day and year separated by slashes, hyphens or periods. For each date column being imported, you will need to specify the order of the month, day and year elements.
- You can import up to 2,000 contact records at a time. If you have more than 2,000 contacts, you will need break your CSV file up into multiple files.
- Each contact must include a first name, last name or company name in order to be imported.
- Before starting your import, you should first ensure that the Imported and Synchronized Contacts list in the Utilities tab is empty.

### Step 1 – Upload your file

1. Indicate whether or not your file includes column headers in the first row of data.

**Note** If possible, you should include column headers in your file, as this will make the import process easier and help ensure the most accurate and complete import of your contacts.

2. Click **Select File** and select the CSV file containing your contacts from your computer.
3. Click **Upload**.
4. A summary of the file contents and a preview of the data are displayed at the bottom of the page. When you are ready, click **Next** to proceed to the next step.

## Step 2 – Column Mapping

In this step you will 'map' each column in your file to the corresponding contact record field in IXACT Contact.

Each row represents a column in your file. For each column, select the IXACT Contact field you wish to map it to. Once an IXACT Contact field is selected, it cannot be selected for another column.

**Note** If your file includes column headers, the system will attempt to automatically map each of your columns to the appropriate IXACT Contact field based on the column header. You should double-check each column to confirm that it has been properly mapped.

You can click the plus sign to the left of any column in order to see a sample of the data in your file.

Any column with '(Ignore)' selected for the IXACT Contact field will not be imported.

For any selected date fields (birth dates, wedding anniversary, move in anniversary), be sure to select the date format using the list to the right of the selected field. The date format indicates the order of the year, month and day for each value in your file.

## Step 3 – Validation & Other Options

Before executing the import, the system will automatically validate your contact data and mapping selections to confirm that all data can be successfully imported. If any validation errors are encountered, the details of each error will be displayed at the top of the page. You can execute the import by clicking **Import Anyway**, but some contact records and/or column values will not be imported. We recommend clicking **Fix Mapping** instead in order to go back to the previous step and fix the validation errors.

Before completing your import, you can assign the following additional values to all of your imported contacts:

- An initial contact Status (defaults to Unassigned).
  - An Original Source selected from your custom list. (You can add a new Original Source on-the-fly by clicking the Modify List link.)
- Note** This option is only available if you did not map a column in your file to the Original Source field.
- One or more Contacts Groups selected from your custom group list. (You can add one or more new groups on-the-fly by clicking the Modify List link.)

The Import Label will also automatically be assigned as a Contact Group to your imported contacts so that you can easily find the contacts added during the import.

Assuming there are no validation errors with your data, when you are ready, click **Import** to complete your import.

Your imported contacts are not immediately added to your contact database. To review your imported contacts in the Imported and Synchronized Contacts list, click the **Utilities** icon in the secondary menu (see [Processing Imported or Synchronized Contacts](#)).

## Merging Duplicate Contacts

If you have duplicate contact records in your database, IXACT Contact gives you the ability to easily identify and merge those duplicates. You can either have the system search for duplicates across your entire database for you, or you can identify duplicates yourself using **List View**.



Only the Team Leader and administrators can use the Merge Duplicate Contacts feature.

### Let the system find duplicates for you

To have the system intelligently identify duplicates in your database for you, start by clicking the **Utilities** icon in the secondary menu (top right of the screen) and select the Merge Duplicate Contacts tab.

**Note** When checking for duplicates, the system only includes contacts that have been accepted into your database. It does not include “pending” contacts in the Imported and Synchronized Contacts list in the main **Utilities** page. (These contacts are identified as duplicates with an asterisk in the first column if they match a contact in your database on name and/or email address.) If you wish to merge a contact in this list using the Merge Duplicate Contacts feature, you must first accept the contact into your database.

You first must decide the criteria by which you want the system to automatically identify duplicate contacts in your database. You have the following options:

- **Name** – Exact match on main contact first and last name
- **Email** – Match on at least one main contact email address
- **Phone** – Match on at least one main contact mobile or home phone number – this ignores special characters found in phone numbers (i.e., (, ), -)
- **Exact Match** – Match on name and email address and phone number – includes contacts where these fields are blank on all records.

Once you have selected your desired matching criteria, click **Find Duplicates**.

The system will return one or more “Groups” of duplicates. Each Group includes two or more matching contacts. Key data points are displayed for each contact record in order to help you decide which contact record to keep (or merge into), and which contact record or records to delete (or merge from). Each Group includes the following options before merging your contacts:

- If you do not wish to merge a Group at all, click the plus/minus toggle at the top left of the Group to hide its details.
- The “Master” contact record is the contact record that will be kept (or merged into) when you merge a Group. The Master record initially appears at the top of each Group, and defaults to the contact record that was added to your database first. You can change the Master record by clicking Set As Master next to another contact record that you wish to set as the master.
- If a Group includes more than two contact records and you do not wish to include a contact in the merge, you can exclude it by selecting Exclude for the Include/Exclude toggle. Note that to merge a Group, at least one contact other than the Master must be set to Include.

When you merge a group of contacts, the following “merge rules” are applied:

- **INCLUDED CONTACTS NOT SET AS THE MASTER WILL BE DELETED FROM YOUR DATABASE.** While these contacts will be stored in your Recycle Bin and can be restored, all activities for the contacts will be deactivated and unassigned, and all tasks and calendar appointments for the contacts will be permanently deleted. (For more information about deleting and restoring contacts, see [Deleting Contacts](#).)
- Only information from the Contact Profile page is merged. All other information and activities for the non-master contact records is not merged.
- Each Contact Profile field on the master record is only updated if the field is blank on the master record and not blank on one of the non-master records.
- Non-matching phone numbers and email addresses from non-master contact records will be added to the master contact.
- Additional contact Groups from the non-master record will be added to the master record.
- Household Members are not updated.
- If any contact in a group has unsubscribed from mass emails, then the master contact record will be set to not Accept Mass Emails.



The team member visibility on the master record is not updated.

When you are absolutely sure that you have set the desired options for a group, click **Merge**.

Once a group of contacts is merged, it will disappear from the list of groups, and you can move onto the next group.

### Identifying duplicates yourself using List View

If you know that two or more contacts in your database are duplicates, you can identify them yourself using **List View** (see [Using List View](#)). Once you have selected your contacts, select the **Merge Duplicates** option from the Select Action list.

Your selected contacts are returned to one merge ‘Group’. You can use the same options described above to set your merge options for the group. When you are ready to merge your contacts, click **Merge**.

## Capturing Leads

### About Lead Capture

IXACT Contact provides a number of ways to automatically capture your leads into your IXACT Contact database. Depending on where your leads come from, you may be able to take advantage of any number of these options.

To set up your lead capture, click the **User Profile** icon in the secondary menu (top corner of the screen), then click the **Lead Capture** tab.

### Setting Defaults for New Leads

The New Lead Settings section allows you to set the following options for all new leads, regardless of where they come from:

- Whether you wish to receive an email notification of each new lead.
- Whether you wish to receive a text/SMS notification of each new lead.
- Whether you want to automatically receive new leads directly into your database. If you prefer to review your new leads before accepting them into your database (see [Processing Imported or Synchronized Contacts](#)), leave this option unchecked.
- The Original Source of Contact to assign to each new lead.
- The Marketing Activity Plan to assign to each new lead.
- The Contact Group to assign to each new lead.

All contacts captured using any of our lead capture options are initially assigned a Contact Status of 'New/Unqualified'.

### Capturing Leads from Emails

Are you already receiving leads via email?

If so, go to the **Lead Capture – Email** section of the **Lead Capture** tab in the User Profile area, and select the *Enable Lead Capture Via Email* check box. Then, log in to the administrative area of your website or lead vendor site and change your notification email address to your lead capture email address. Your leads will automatically be added to your IXACT Contact database.



*Each Team Leader can capture their own email leads by using their unique lead capture email address.  
Each team member can receive their own email and/or text notifications when they receive a lead.  
Email leads captured by a team member are automatically assigned to the team member.*

If you are receiving email leads from more than one website or lead vendor, you can set this up for as many different lead sources as you wish.

**Note** If you do not know how to change your lead notification email address, contact your website or lead vendor, and they should be able to assist you.



**Note** Since your lead email notifications will be redirected to your special lead capture email address, make sure to turn on email notifications in your **New Lead Capture** so you are still notified of your email leads.

Upon receiving each lead email, we will create a new contact record by scanning the body of the email and mapping as much information as possible to specific contact profile fields. All information in the body of the email that cannot be mapped to specific fields will be inserted into the Original Source of Contact Notes field. This way you will not lose any of the valuable lead information.

**Note** Our email lead capture has been programmed to map as much information as possible to specific contact profile fields. If there is information in your emails that you feel should be mapped to specific fields, but is ending up in the Original Source of Contact Notes, let us know, and we will see if we can make the necessary programming changes.

New email leads that are not accepted directly into your database appear in the Imported & Synchronized Contacts list in the Utilities area with a Source of 'Contact Us'. Once accepted into your database, the contact Entered By is also set to 'Email Lead Capture'.

## Building Your Own Form

IXACT Contact allows you to easily add a customized page to your website so that visitors can fill out a "Contact Us/Me" form and their contact information is automatically added to your IXACT Contact database.



*Each member of a team can set up their own Contact Us form using their own branding. Each team member can receive their own email and/or text notifications when someone fills out their Contact Us form. Leads who fill out the team member's Contact Us form are automatically assigned to the team member.*

**Note** If you are going to build your own form, make sure you turn on the option to receive an email notification of each new lead.

Set up your Contact Us/Me form by following the step-by-step instructions under the **Lead Capture – Build Your Own Form** section of the **Lead Capture** page.

Your personalized HTML code can now be copied to your website in order to add your new Contact Us/Me page. The HTML code can be used with any text or image hyperlink. If you have a webmaster who is responsible for the administration of your website, they should be able to help you add your new Contact Us/Me page.

For further assistance, please call Customer Support at 1-866-265-6990.

New leads from your form that are not accepted directly into your database appear in the Imported & Synchronized Contacts list in the Utilities area with a Source of 'Contact Us'. Once accepted into your database, the contact Entered By is also set to 'Contact Us'.

## Zillow Tech Connect

IXACT Contact is a member of Zillow's Tech Connect program, which allows you to automatically flow all of your Zillow leads directly into your database.

In addition to capturing each lead's name, email address and phone number, we also capture their buying preferences as well as the details of the property that they have expressed interested in.

Tech Connect is set up from within your Zillow account.

To set up Zillow Tech Connect for IXACT Contact:

1. Go to your Zillow Profile, and in your Account settings, select **Connect to My CRM**.
2. Click **Add Partner**.
3. From the **Select a Partner** list, select "IXACT Contact".
4. In the **Partner ID** box that appears, enter the email address that you use to login to IXACT Contact.
5. Click **Save**. IXACT Contact will now appear in the partner list.

**Note** You do not need to do anything in IXACT Contact. Once you complete your setup in Zillow, your Zillow leads will immediately start flowing into your IXACT Contact database.

**Note** After setting up Zillow Tech Connect, you will continue to receive new lead email notifications from Zillow. Depending on whether you receive electronic leads from other sources, and how you are notified of these leads, you may or may not want to turn off IXACT Contact lead notifications in your New Lead Settings.

New Zillow leads that are not accepted directly into your database appear in the Imported & Synchronized Contacts list in the Utilities area with a Source of 'Zillow Tech Connect'. Once accepted into your database, the contact **Entered By** is also set to 'Zillow Tech Connect'.

All property details appear in the Notes field in the Original Source of Contact section of the Contact Profile tab.

Buying preferences appear in the Buying Preferences section of the Properties tab.

## FiveStreet Integration

If you use FiveStreet to capture your leads, you can set up FiveStreet so that your new leads automatically flow right into your IXACT Contact database.

To set up FiveStreet/IXACT Contact integration, you'll need your IXACT Contact encrypted lead capture ID. You can find this at the bottom of the **Lead Capture** tab of your **User Profile**. Copy your lead capture ID by highlighting and copying it. Then follow these steps in FiveStreet.

1. Login to FiveStreet, and select **Add-Ons & Integrations** under the Account settings menu.
2. Find IXACT Contact in the Add-Ons & Integrations list and click **Configure**.
3. Paste your IXACT Contact lead capture ID in the box provided.
4. Click **Save**. The OFF indicator will now change to ON next to IXACT Contact in the list.

**Note** You do not need to do anything in IXACT Contact. Once you complete your setup in FiveStreet, your FiveStreet leads will immediately start flowing into your IXACT Contact database.

**Note** After setting up FiveStreet integration, you will continue to receive new lead email notifications from FiveStreet. Depending on whether you receive electronic leads from other sources, and how you are notified of these leads, you may or may not want to turn off email lead notifications in your New Lead Settings.

New FiveStreet leads that are not accepted directly into your database appear in the Imported & Synchronized Contacts list in the Utilities area with a Source of 'FiveStreet'. Once accepted into your database, the contact Entered By is also set to 'FiveStreet'.

## Homes.com Integration

If you use Homes.com to capture leads, you can have your new leads automatically flow right into your IXACT Contact database.

To set up the integration between Homes.com and IXACT Contact, follow these steps.

1. Login to your Homes.com Connect account, and from the main menu in the top left corner of the page, click **Leads & Contacts**, and then click the **Partners** option.
2. In the IXACT Contact section of the page, click **Generate Key**. Your API key will appear to the left.
3. Click **Copy to clipboard** to the right of the API key.
4. Login to IXACT Contact, go to your **User Profile**, find Homes.com under the Integrations section of the page, and click **Connect to Homes.com Account**.
5. Paste your API key into the field provided, and click **Connect to Homes.com**.

Once you complete the setup, your new Homes.com leads will immediately start flowing into your IXACT Contact database.

New Homes.com leads that are not accepted directly into your database appear in the Imported & Synchronized Contacts list in the Utilities area with a Source of 'Homes.com'. Once accepted into your database, the contact Entered By is also set to 'Homes.com'.

## Form Post & Web Service

The lead capture Form Post & Web Service options are more technical alternatives for feeding more complete lead information into IXACT Contact. If you work directly with a website or lead vendor, and you are interested in taking advantage of these options, please call Customer Support at 1-866-265-6990.

## Exporting Contacts for Import into IXACT Contact

### Exporting Contacts from Microsoft Outlook

To export contacts from Microsoft Outlook into IXACT Contact:

1. From the File menu, select **Open & Export**, and then **Import/Export**.
2. Select **Export to a file**.
3. Click **Next**.
4. Select **Comma Separated Values**.
5. Click **Next**.
6. Select your **Contacts** folder you want to export.
7. Click **Next**.
8. Click **Browse**.
9. Select a location (your Windows desktop for example) and type a File name.
10. Click **OK**.
11. Click **Next**.
12. Click **Map Custom Fields**.
13. Click **Default Map**.
14. Click **OK**.
15. Click **Finish**. The **Import and Export Progress** screen will appear. When it disappears, the export is complete.

### Exporting Contacts from Top Producer

The following sections provide instructions for exporting contacts from Top Producer for import into IXACT Contact.

#### *Top Producer 7i*

To export contacts from Top Producer 7i:

1. From the Setup menu, select **Data transfer / conversion** and then **Export data...**
2. From the **Export contacts** page, select to **Export all contacts** or **Search for contacts to export**.
3. Click **Next**.
4. If you selected to **Search for contacts to export**:
  - a) Perform either a **Quick search** or an **Advanced search** to locate the records you want to export.
  - b) Click **Start search**.
  - c) From the **Contact search results for export** page, select the records you want to export.

- d) Click **Next**.
5. From the **Export contacts to a file** page, select **Export all columns**.
6. Click **Start export**.
7. The **Save exported file as** dialog box opens.
8. Select a location (your Windows desktop for example) and type a File name.
9. Click **Save**.
10. The **Exporting records to file** dialog box opens, asking you to wait until the export process is complete.
11. When the **Export complete** dialog box is displayed, click **OK**.

### ***Top Producer 8i***

To export contacts from Top Producer 8i:

1. From the Contacts menu, select **Search for Contacts**.
2. Enter the search criteria for the contacts you would like to export. If you would like to export all contacts, stay on the **Quick Search** tab and do not enter any search criteria.
3. Click **Search** at the bottom of the page.
4. On the **Search Results** screen, select the individual contacts to export by checking the box next to each name, or select them all by checking the box at the top of the list.
5. Click **Export Contacts** at the bottom of the page.
6. On the **Export Contacts** screen under **Export options**, select **Contact record and all associated items**.
7. Click **Export**. A message will appear stating the request is being processed. The processing time will depend upon how many contacts are being exported, and which of the four export options was selected.
8. Once the processing is complete, a prompt will appear allowing you to save the file. Click **Save** to save the file to your computer.

**Note** If you are using Internet Explorer and you do not receive a prompt to download the file, it is possible that Internet Explorer's security settings have blocked the download. Click the yellow bar at the top of the page that says "To help protect your security..." and select **Download File...** and return to step 6.

9. Select a location (your Windows desktop for example) and type a File name.
10. Click **Save**.
11. If the **Download Complete** dialog box appears, click **Close**.

### **Exporting Contacts from Realty Juggler**

To export contacts from Realty Juggler:

1. Sign in to your Realty Juggler account. From the Main menu, click **Contacts**.

2. Click the **Export** link at the bottom of the page.
3. Click **Export**.
4. Save the export file to your computer.

### Exporting Contacts from Wise Agent

To export contacts from Wise Agent:

1. Sign in to your Wise Agent account.
2. On the Contacts Tab, click **Import/Export**.
3. Click **Export Outlook/CSV**.
4. On the Select Clients to Export screen make sure Category is set to Show All and "include contact notes in export" is set to "yes".
5. Above the first contact Name, check the Select All check box.
6. Click **Export Selected**.
7. Save the export file to your computer.

### Exporting Contacts from Gmail

To export contacts from Gmail:

1. Sign in to Gmail.
2. Click **Gmail** at the top-left corner of your Gmail page and choose **Contacts**.
3. Choose **More » Export**.
4. Choose whether to export all contacts or only one group.
5. Select the Outlook CSV export format.
6. Click **Export**.
7. Save the export file to your computer.

### Exporting Contacts from Yahoo! Address Book

To export contacts from Yahoo! Address Book:

1. Sign in to Yahoo! Mail.
2. Click on the **Contacts** tab.
3. Click **Actions**, and select **Export All**.
4. When the Export screen displays, click **Microsoft Outlook: Export Now**.
5. Save the export file to your computer.

### Exporting Contacts from ACT!

To export contacts from ACT!:

1. From the File menu, select **Data Exchange** and then **Export**.

2. In the **File type** field, select **Text - Delimited**.
3. Select a location (your Windows desktop for example) and type a File name. Make sure you enter a file name with a .csv extension.
4. Click **Next**.
5. Select **Contact records only**.
6. Click **Options**.
7. Select the **Comma** option button in the **Select field separator** section.
8. Select the **Yes, export field names** check box in the **Do you want to export field names** section.
9. Click **OK**.
10. Click **Next**.
11. Select **All records**.
12. Click **Finish**. Do not click **Next** at this step, since doing so will open the ACT field mapping options. Any mapping changes made to the data file will cause the data to import into the wrong fields in IXACT Contact.

## Exporting Contacts from IXACT Contact

You can export your IXACT Contact contact records into a .csv (comma-separated values) file.



*If you are a member of a team, the Team Leader must grant you permission to export the contact list.*

To export contacts:

1. In IXACT Contact, click the **Utilities** icon in the secondary menu (top right of your screen).
2. Click the **Export IXACT Contacts** button.

**Note** The export can take some time depending on the size of your database. If you are unable to generate an export file, please call Customer Support at 1-866-265-6990.

## Using List View

The contacts List View feature allows you to work with a selected group of contacts in a tabular format in the working area of the screen.

List View allows you to easily execute common actions against the selected contacts with the click of a button, such as:

- Send a mass email
- Send a mass text \*
- Create mail-merged letters or labels
- Assign an activity plan

- Assign a Keep in Touch call \*\*
- Assign contact groups
- Remove contact groups
- Assign contact status
- Generate reports
- Export contacts
- Delete contacts
- Merge Duplicate contacts

\* Requires the purchase of a custom texting number (see [Purchasing Your Custom Texting Number](#))

\*\* Requires Keep in Touch Calls functionality to be enabled in the User Profile Keep in Touch tab (see [Setting Up Your Keep in Touch Options](#)).

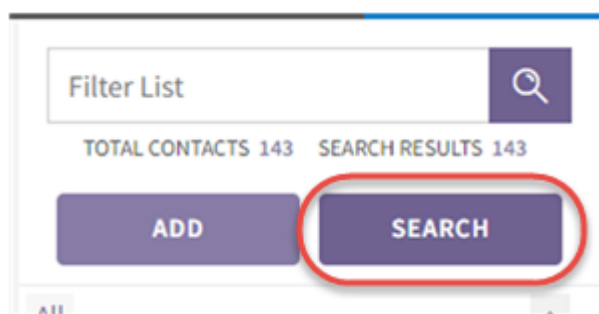


*If you are a member of a team, the Team Leader must grant you permission to delete or export contacts.  
Team Leaders and administrators can assign one or more team members visibility to the selected contacts.  
Only Team Leaders and administrators can merge duplicate contacts.*

In addition, IXACT Contact will remember the list of contacts you are working within List View, meaning you can leave List View to perform any other task and, when you are ready to return to List View, you can continue to work with the same list of contacts.

To start working with a list of contacts:

1. Click the **Search** button above the contact list in the right column.



2. Each time you sign in to IXACT Contact, the first time you click **Search** you will be provided with the same options for searching and selecting contacts that you find throughout IXACT Contact (see [Selecting Contacts](#)).
3. Upon selecting your contacts, the list is displayed in the working area.



NEW SEARCH

SORT BY:  First Name  Last Name      DISPLAY:  Home Address  Mail To Address      Mass Actions ▼ →

<input type="checkbox"/>	Main Contact Spouse/Partner	Address	City	State/ Province	Zip/Postal Code	Phone				
<input type="checkbox"/>	<a href="#">Adams, Andrew</a> Jessica Adams	38 Fred Varley Street	Markham	Ontario	L3W 2N4	(416) 230- 5661				
<input checked="" type="checkbox"/>	<a href="#">Andrews, Sal</a> Belinda	256 Humboldt Drive	Markham	Ontario	L8W 4G4	(905) 820- 5480				
<input type="checkbox"/>	<a href="#">Aradanov, Daniela</a>	12 Angle Court	Don Mills	Ontario	M4F H7W	(416) 357- 9028				
<input type="checkbox"/>	<a href="#">Araujo, Stan</a> Melanie Burland	3356 Bayview Ave.	Thornhill	Ontario	L9B 3N3	(416) 367- 8636				
<input type="checkbox"/>	<a href="#">Attard, Mark</a> Pat Attard	42 Pomander Drive	Markham	Ontario	L38 2N5	(905) 415- 8271				

4. Change the display or select one or more contacts to perform an action, as follows:
- To change the group of contacts you are working with, click **New Search** at the top of the page.
  - To change the addresses shown, select Display Home addresses or Display Mail To addresses at the top of the list.
  - To change the order in which contacts are displayed, select **Sort By First Name** or **Sort By Last Name** at the top of the list.
  - To sort the list by any column, simply click the column header. To sort the list in reverse order, click the same column header again.
  - To open a contact record, click the contact's name link. When opening a contact from List View, you can use the **< Previous** and **Next >** buttons at the bottom of the contact profile page to navigate through the contacts in the list. Click **Return to List** to return to the list. *You must return to the read-only contact profile page to use the navigation controls.*
  - To quickly enter a note for contact, click the **Quick Note** icon next to the contact
  - To quickly enter a task for a contact, click the **Quick Task** icon next to the contact
  - To delete a contact, click the garbage can icon next to the contact.
  - To perform a task for multiple contacts, select each contact by checking the box next to each contact. Or, you can click the **Select All** check box at the top of the list to select all contacts, and then, if necessary, clear the check box beside the contacts that you do not want to include. Once you have chosen your contacts, select the desired action from the drop-down above the list to execute that action for the selected contacts.

**Note** If you are working with over 200 contacts in List View, your contacts are displayed over multiple pages and controls are provided at the top of the list to navigate through the pages. The **Select All** check box only applies to the displayed page of contacts. To assist you in selecting the desired contacts, the total number of selected contacts is always displayed at the bottom of the list.

**Tip** If you leave List View to perform another task in IXACT Contact, the next time you click **Search** you will return directly to the same list of contacts.

## Texting Individual Contacts

Once you [purchase your custom texting phone number](#), you can text any individual contact with at least one mobile number on their contact profile.

To text an individual contact:

1. Open the contact profile.
2. Click the Text Contact icon next to the mobile number you want to send a message to.

**Note** For contact-specific tasks and appointments, the Text Contact icon is also available in the contact details area of the task or appointment page.

3. Enter your message in the area at the bottom of the popup.

**Note** A text segment is up to 160 characters and each segment requires 1 available text. As you type your text message, the indicator below tells you how many characters you have entered, and how many text segments are required. If your text message exceeds 160 characters, you will require more than 1 available text. If you do not have enough available texts to send your message, you can click **Purchase Texts** to buy more (see [Purchasing More Texts](#)).

**Note** If you text a main contact mobile number, and the spouse/partner also has a mobile number, you can opt to send the message to both numbers by selecting the Text Partner/Spouse option. Note that this will double the number of required available texts to send your message.

4. If you want to include a picture with your message, click the Attach Picture icon to the left of your message, and select the picture file from your computer.

**Note** The maximum picture file size is 2MB.

**Note** Messages that include a picture require 2 additional texting credits.

5. When you are ready to send your text, click **Send**.

The area above the message box displays your texting "conversation" with the contact much like you see on your mobile phone.

A record of each outbound text message is also recorded in your contact's Contact History. If you opt to text both the main contact and spouse/partner, separate entries will be recorded for each.

## Deleting Contacts

You can delete a contact to remove it from your contact list. It will be stored in the IXACT Contact Recycle Bin just in case you need to restore the contact at a later date.



*If you are a member of a team, the Team Leader must grant you permission to delete contacts.*

If a contact is deleted:

- Any associated Active Business entry is deleted
- The contact's contact-specific Keep In Touch events are deleted
- The contact's marketing activity plans are unassigned and any outstanding tasks are deleted
- The contact is removed from all global Keep In Touch events

If the contact is restored from the recycle bin:

- Associated Active Business entries are restored
- Contact-specific Keep In Touch events are restored, but in deactivated status
- The contact must be reassigned to global Keep In Touch events

If you want to permanently delete the contact, it can be deleted from the recycle bin.

A contact's properties, Active Business and contact-specific Keep In Touch events may also be deleted (and restored from the recycle bin) independently. For more information, see [Using the Recycle Bin](#).

**Tip** To delete multiple contacts at the same time, use [List View](#).

## Keeping Track of a Contact's Properties

For each contact, you can maintain a list of current and previously owned properties, as well as identify buying preferences if they are a prospective buyer (see [Identifying a Contact as a Prospective Buyer](#)).

### Viewing a contact's properties

To manage a contact's properties, open the contact record, and then click the Properties tab. The Properties Summary section lists all properties that the contact currently owns, once owned, or is in the process of buying. (See the [Active Business](#) section for more information on properties in Buying status.)

### Adding a property for a contact

To add a property for a contact:

1. On the contact's Properties tab, in the **Properties Summary** section, click **Add Property**. The tab changes to show the detail fields for the property.
2. Indicate if the contact currently owns or once owned the property.
3. Enter the address -- if you are entering the contact's primary residence, click **Set to Contact Home Address** to populate the fields from the information entered in the Contact Profile tab.
4. Complete as many of the remaining fields as you wish.
5. If you wish, upload a photo of the property (must be in .gif, .jpeg or .png format).
6. Click **Save**. The property now appears in the **Properties Summary** list. If you need to edit the property information, click the **Address** link.

### Entering a contact's Buying Preferences

Whether or not a contact is currently a Prospective Buyer, you can fill out their buying preferences in the **Buying Preferences** section in the contact's Properties tab. For information about setting a contact as a Prospective buyer, see [Identifying a Contact as a Prospective Buyer](#).

### Viewing the contact's Active Business history

Whenever an Active Business listing involving a contact is closed, canceled, expired, or withdrawn, it is recorded in the **Business History** section in the contact's Properties tab.

### Viewing a Contact's Keep In Touch Events & Activity Plans

The Keep In Touch tab in the [contact record](#) lists all global events (whether this contact is assigned to them or not), the contact's birthday events, move in anniversary event, \*Keep In Touch call events, any contact-specific events, and any activity plans assigned to the contact.

\* Requires Keep in Touch Calls functionality to be enabled in the User Profile Keep in Touch tab (see [Setting Up Your Keep in Touch Options](#)).

**Note** The contact-specific Keep In Touch tab is used to manage contact-specific events and plans, as well as the contact's assignments to global Keep In Touch events. The Keep In Touch button in the main menu is used to create and manage global Keep In Touch events (as well as the default settings for the birthday events, the move in anniversary event, and Keep In Touch call events). The Activity Plans button in the main menu is used to create and manage Activity Plans.

- To view details of a Keep In Touch event (global or contact-specific), click its name link.
- Select or clear the **Include Contact in Event** check box to cause the contact to be included in (or excluded from) a global Keep In Touch event. (This is linked to the contact selection in the Keep In Touch event details: changes in one location are reflected in the other.)

- Once a birth date is entered for a main contact or a spouse/partner, the corresponding birthday event can then be activated for the contact by either opening and saving the birthday event or by clicking **Activate**. The event options default to the global birthday event but can be changed for the contact by opening, modifying and saving a contact-specific birthday event.

**Note** If you wish, you can set a preference in the global Birthday event so it is automatically activated for contacts with a birth date. This applies to both the main contact birthday and the spouse/partner birthday.

- Once a move in date is entered for the home address on a contact's profile, the move-in anniversary event can be activated for the contact by either opening and saving the event or by clicking **Activate**. The event options default to the global move-in anniversary event but can be changed for the contact by opening, modifying and saving a contact-specific event.

**Note** If you wish, you can set a preference in the global move in anniversary event so that the event is automatically activated for contacts with a move in date.

- Any Keep In Touch call event can be activated for the contact by clicking the **Activate** button in the list. Enter the date you want for the first call, and click the **Activate** button. Using the **Activate** button in the list will use the global Keep In Touch call event options. If you want to override the global event options for the contact, open the contact-specific event by clicking on the event name, make the desired changes to the event, and click **Activate**.

**Note** Requires Keep in Touch Calls functionality to be enabled in the User Profile Keep in Touch tab (see [Setting Up Your Keep in Touch Options](#)).

- To create an event that only applies to this contact, click **Create New KIT Event** above the list titled "Keep in touch events specific to this contact". See [Creating a Contact-Specific Keep In Touch Event](#) for information about creating a contact-specific event.
- To assign an activity plan to a contact, click **Assign New Activity Plan**. For more information, see [Assigning an Activity Plan to a Contact](#). If you want to unassign an activity plan, click the **Unassign plan and delete incomplete tasks** button next to the plan in the list. The plan is unassigned and incomplete tasks are deleted. Completed tasks created from the plan are not deleted and remain in the contact's activity history.

## Creating a Contact-Specific Keep In Touch Event

To create a contact-specific Keep In Touch event:

1. In the contact's Keep In Touch tab, click **Create New Event**.
2. Enter a name and description for the event.
3. Select the event date.
4. Select the **All Day Event** check box, if appropriate, otherwise enter the start and end time of the event.

5. Indicate if this event should be included in your calendar and task list. If you include the event in your task list, indicate whether you want a reminder and when.



*Use the Assign To drop-down lists for the calendar appointment and the task to select the team member(s) to which the appointment and task are to be assigned.*

6. If this will be a recurring event, select the **Recurring** check box and enter the recurrence pattern for the event. If you want the recurrence to end on a specific date, select the event end date in the field to the right of the event date.
7. If there are individual tasks that must be completed as part of this event, click **Add Event Task**. Enter the name of the task, the number of days prior to the event date it is due, and if a reminder is required. Click **Save**. Add as many event tasks as required.

**Note** Event tasks can only be entered for non-recurring events, or events that recur on a yearly basis.



*Use the Assign To drop-down list to select the team member to which each task is to be assigned.*

## Assigning an Activity Plan to a Contact

To assign a Marketing Activity Plan to a contact:

1. From the contact's Keep In Touch tab, click **Assign New Activity Plan**.
2. Enter the plan start / event date (defaults to the current date).
3. To search for the desired plan, select the method of correspondence from the list and/or enter a keyword, and click the magnifying glass icon to limit the list of plans to select from.
4. Click the check box next to the plan you wish to select and click **Continue**.
5. The next screen displays a list of the plan tasks and the due date automatically assigned to each task. If necessary, prior to assigning the plan, you can modify the automatically assigned date for each task, or remove the check in the Include column to exclude the task altogether.

**Note** At this point nothing has actually been assigned or created. If for some reason you do not wish to assign the plan, click **Cancel**. If you wish to assign a different plan or change the plan start date, click the Back button and return to step 2.



*Each task includes an Assign Task To drop-down list for the selection of the team member to which each task is to be assigned. For email and letter tasks, an additional Send From drop-down list provides for the selection of which team member branding to use for the email or letter. The default assignments are based on the set up of the activity plan (See [Creating a Marketing Activity Plan](#)). There are also drop-down lists and*

*Update buttons at the top of the page that allow you to easily update the Assign Task To and/or Send From team member selections for all activity plan tasks.*

#### 6. Click **Assign Plan and Create Selected Tasks**.

For information on viewing and completing activity plan tasks assigned to a contact, see Viewing a Contact's Activities & History.



You can use [List View](#) to easily assign a Marketing Activity Plan to multiple contacts at the same time.

### Adding a Contact to the Business Directory

If a contact provides a service that might be of interest to your other contacts, add the contact to your Business Directory.

**Note** The contact-specific Business Directory tab is used to include individual contacts in your business directory and enter additional business directory information. The Business Directory button in the main menu is used to search and return a list of all contacts that are included in your business directory.

To add an existing contact to your Business Directory:

1. Open the contact record, and then click the Business Directory tab (*not* the Business Directory button in the main menu).

The information from the Work Details section of the Contact Profile tab is shown on the Business Directory tab.

**Tip** Remember to assign a **Business Type** in the **Work Details** section of the Contact Profile tab.

2. Select the **Include in Business Directory** check box at the top of the tab.

**Tip** You can also select the **Include in Business Directory** check box in the **Work Details** section of the Contact Profile tab.

3. Optionally, enter an alternate contact, a description of the company services, notes, or any special promotions.
4. Click **Save**.

For information about searching or printing the Business Directory, see [Using the Business Directory](#).

### Entering Notes for a Contact

Use notes to record and create a history of general notes for a contact, as well as activities that are not classified as prospecting activities. (See [Recording Prospecting Updates for a Contact](#) to learn how to record prospecting activities with your contacts.)

All notes are recorded in the contact's Contact History.

**Note** You do not need to manually record any communications sent via IXACT Contact, i.e. [letters](#) or [mass emails](#); these are recorded automatically in each contact's Contact History.

To enter note for a contact:

1. Open the contact record, and then click the **Enter Note** button.
2. Change the date and/or time of the note, if required.
3. Select the note type (phone call, meeting, note, etc.).  
**Note** To manage the list of note types, click **Modify List**.
4. Enter the note.
5. Click **Save**.



You can also enter a note at any time by clicking the **Quick Note** icon for the contact in the **Contacts** list in the right column. You can also enter notes for your contacts in List View (see [Using List View](#)) as well as Business Pipeline (see [Using Business Pipeline](#)).

## Recording Prospecting Activities for a Contact

Use prospecting activities to record and create a history of interactions with your contacts that can be classified as prospecting activities. (See [Entering Notes for a Contact](#) to learn how to record general notes for your contacts.)

All prospecting activities are recorded in the contact's Contact History.

**Note** If the prospecting activity results in a change in the contact's status, remember to change their status and/or prospect type on the contact profile. The status and/or prospect type can also be changed in Business Pipeline (see [Using Business Pipeline](#)).

**Note** You do not need to manually record any communications sent via IXACT Contact, i.e. letters or mass emails; these are recorded automatically in each contact's Contact History.

To enter prospecting activity for a contact:

1. Open the contact record, and then click the **Prospecting Update** button.
2. Change the date and/or time of the entry, if required.
3. Select the activity type from the list.

**Note** You can create your own "custom" prospecting activity types by clicking the **Modify List** link above the list. While you can add as many of your own activity type as you like, you cannot delete the six pre-loaded types. If you add your own activity types, they will automatically be reflected in your Goal Setting setup (see [About Goal Setting](#)) and the Dashboard Prospecting Activities widget.

4. Enter any notes about the interaction.
5. Click **Save**.

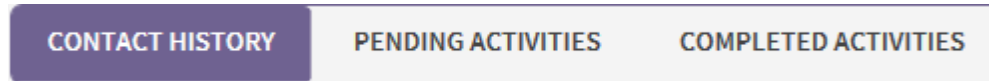


You can also enter prospecting activities for your contacts in Business Pipeline (see [Using Business Pipeline](#)).



## Viewing a Contact's Activities & History

The Activities/History tab provides visibility to a contact's Contact History, Pending Activities, and Completed Activities. Use the buttons at the top of the page to toggle between these lists.



The Pending Activities list displays all incomplete tasks as well as all upcoming calendar appointments for the contact.

**Note** If a task is created from an activity plan (see [About Activity Plans](#)), the activity plan name and the activity type are included in the list. If the activity type is Email or Letter, an icon will appear to the right of the due date. Click the icon if you wish to send the email or print the letter. Upon clicking the icon, you have the option to update the task to Completed.

The Completed Activities list displays all completed tasks as well as all past calendar appointments for the contact.

The Contact History displays the following for the contact:

- Notes
- Prospecting Updates
- Monthly e-Newsletter emails
- Mass emails
- Marketing Activity Plan auto-emails
- Automated Birthday and Move In Anniversary e-Cards
- Letters printed
- Captured email correspondence

**Note** For all emails in Contact History, the system displays the date and time the email was opened by the recipient. "UNOPENED" is displayed if the email has not been opened.

## Capturing Email Correspondence

With **Email Correspondence Capture** you can easily save your emails with your contacts to their Contact History.

This feature allows you to automatically capture emails sent and received using your own email software, and it not to be confused with the Mass Email feature for which contact history records are already automatically captured.

This is how it works:

### Emails Sent

When you send an email to an email address that matches a contact's email in your IXACT Contact database, simply enter the email address `notes@ixactcontact.com` in the Bcc field, and the email subject and body will automatically be added to your contact's contact history. If you send an email to multiple matching contact email addresses, the email contents will be added to the contact history of all the matching contacts.

Contact history records added using email capture are assigned an Activity Type of 'Email' with a Performed By of 'Email Capture'.

**Note** When HTML-formatted emails are captured, only the text of the email is captured and displayed.

**Note** While the notes@ixactcontact.com email address can be entered in any one of the To, Cc or Bcc fields, the email addresses of your contacts can only be entered in the To or Cc fields.

## Emails Received

There are two ways to capture the contents of an incoming email to the sender's contact history.

- Simply send a short reply acknowledging receipt, and enter notes@ixactcontact.com in the Bcc field.
- If for some reason you do not wish to reply to the email, you can forward the email to notes@ixactcontact.com, and follow the steps described in the Unassigned Emails section below.

For security reasons, all email capture emails must be sent from an authorized email address. The email address you use to sign in to IXACT Contact is automatically an authorized address. If you want to send emails from other email addresses, click the **Modify List** button next to the list, and add the email addresses to the authorized list.



*If you are a member of a team, you can also send email capture emails from the email address you use to sign in to IXACT Contact. However, only the Team Leader can add additional email addresses to the authorized list.*

## Unassigned Emails

If you send an email to notes@ixactcontact.com and do not include any other email addresses that match the email address of a contact in your database, the email cannot be automatically associated with a contact. Instead the email will be added to the Email Correspondence Capture – Unassigned Emails list in the Utilities area.

The Email Correspondence Capture – Unassigned Emails list displays the email address the email was sent from, the Subject of email, and the date and time the email was sent. Click **View Body** to see the contents of the body of the email. Click **Link to Contact(s)** to search for and select one or more contacts that you want to link the email to.

If you have questions or require further assistance, call Customer Support at 1-866-265-6990.

## Uploading Documents Related to a Contact

To upload and store important documents related to a contact:

1. From the contact's Documents tab, click **Add Document**.
2. Click the **Upload File** button to select the file from your computer.

**Note** Files cannot be larger than 10MB each. Click **Accepted File Types** in order to see a list of file extension types that you are allowed to upload.

3. Select the **File Type** from the list.

**Note** To manage the list of file types, click **Modify List**.

4. Enter a description of the file.

5. Click **Save**.

To open or download the file to your computer, click the file name in the list, or click the **Download** icon next to the file in the list.

To edit a file details, click the **Edit** link next to the file name.

To delete a file, click the **Delete** link next to the file name.

**Note** It is very important that you maintain and backup a copy of all uploaded documents on your own computer.  
If you permanently delete a contact, all related uploaded documents are also deleted.

## Business Pipeline

### About the Business Pipeline

Your Business Pipeline provides an "at-a-glance" breakdown of your contact database by status, giving you an idea of how well you're qualifying and nurturing new leads, and how successful you are at turning those leads into clients and long-term referral sources.

Use the Business Pipeline to determine which contacts are close to doing business with you, and which contacts require your attention.

### Using the Business Pipeline

To see an actionable list of all of contacts in a particular status, simply click on that status in the color-coded breakdown.

**Note** If you create your own custom statuses (see [Setting Up Your Keep in Touch Options](#)), they will automatically be added to the color-coded breakdown.



*The Team Leader or administrators can use the Team Member list to display the Business Pipeline either for the entire team or for an individual team member based on contact visibility. Team members who are not administrators can only see the Business Pipeline for their own contacts.*

The list provides you with the following information on each contact:

- Main contact and spouse/partner name
- Primary phone number and email address
- Date added to your database
- Main contact picture (from the contact's Social Intelligence tab)
- Date and type of the last correspondence sent from IXACT Contact
- Date and type of your last prospecting activity with the contact
- Prospect Type

For each contact in the list, you can easily perform the following actions:

- Open the contact record by clicking on the name
- Send an email by clicking on the email address
- Enter a Quick Note
- Enter a Quick Task
- Update the contact's Status
- Record a prospecting update
- Delete a contact

## Task List

### Using the Task List

Use the Task List to add a task, view a list of all completed and incomplete tasks (regardless of due date), or view details of a task.

**Tip** You can view a list of tasks due today on your Home page. When you mark a task as complete, it is removed from the list.

Click **Task List** in the main menu.

Incomplete Tasks		Completed Tasks			
<a href="#">MASS COMPLETE</a>   <a href="#">MASS DELETE</a>   <a href="#">PRINT LIST</a>   <a href="#">SHOW SEARCH</a>   <a href="#">ADD TASK</a>					
<small>(Mass Complete/Delete applies only to the current page)</small>					
<input type="checkbox"/>	Subject	Priority	Status	Due Date	
<input type="checkbox"/>	<a href="#">Move In Anniversary - Apr 18 - Send a Card/Gift *[Kane, Valerie]*</a>	Normal	Not Started	04/13/2019	
<input type="checkbox"/>	<a href="#">Birthday - Apr 15 - Send Card/Gift *[Gaasenbeek, Rich]*</a>	Normal	Not Started	04/14/2019	
<input type="checkbox"/>	<a href="#">fup w Stan re dt condo purchase in summer *[Novac, Stan]*</a>	Normal	Not Started	04/23/2019	
<input type="checkbox"/>	<a href="#">Move In Anniversary - Apr 30 - Send a Card/Gift *[Wallace, Peter]*</a>	Normal	Not Started	04/25/2019	

To add a new task, click **Add Task**. See [Adding a Task](#) for information about the task record fields.

The tasks are presented on two tabs: Incomplete Tasks and Completed Tasks.

- Tasks that are overdue are shown in red.
- If a task is associated with a contact, the contact name is included in the Subject in the list views. To view the contact record, click .
- To view details of a task, click the subject link.

**Note** If a task is created from an activity plan (see [About Activity Plans](#)), the activity plan name and the activity type are displayed beneath the subject.

**Note** If the Activity Type is Email and Auto-Send Email is selected, the email will automatically be sent on the task due date and the task will be deleted. A record of the sent email will be recorded in the assigned contact's contact history.

- To mark an individual task as complete when viewing the task list, click the **Complete** icon next to the task. The task is moved to the Completed Tasks tab.  
To mark a task as complete when viewing the task details, change the **Status** to "Completed" (or change the **Complete %** to "100").  
To mark multiple tasks as completed, select the check box beside each task you wish to mark as complete and click **Mass Complete**.

- To delete a task, click the **Delete** icon. To delete multiple tasks, select the check box beside each task you wish to delete and click **Mass Delete**.
- To search for a task or tasks, click **Show Search** on either the **Completed Tasks** or the **Incomplete Tasks** screen (the search filter is applied to both lists). You can search by any combination of keyword, priority, or a range of task due dates. The keyword search searches for the keyword anywhere in the task subject, as well as the activity type for tasks created from activity plans. You can also search just for Keep in Touch Calls, with or without a range of task due dates. Your current search criteria is always displayed above the list and the criteria remain applied even if you leave the task list to work in another area of the program and return later on. To remove your search criteria, simply click **Show Search** again and click **Clear**.

**Note** By default auto-send (drip) email tasks are hidden from your incomplete task list. If you wish to view your outstanding drip email tasks, simply click **Show Search** and uncheck Exclude drip emails.

- To display a report of your outstanding tasks, click **Print List** on the Incomplete Tasks list. Whatever search filter you may have applied to the list is also applied to the Outstanding Tasks report. After displaying the report, you can return to the Incomplete Tasks list by clicking **Back To Task List**.
- To help you organize your work schedule, IXACT Contact gives you the ability to schedule your tasks in your calendar. To add an Incomplete task to your calendar, click the **Add to Calendar** icon. A new appointment record is created with the appropriate information auto-populated from the task. You are prompted to either delete or keep the corresponding task. (See [Adding an Appointment](#) for information about creating an appointment.)

**Note** When you create an appointment from a task, if you decide to keep the task in your task list, the appointment and task are *not* linked. Any changes you make to one will have no effect on the other.



*As a member of a team, you have full access to the task lists of other team members who are sharing their task list. Use the drop-down list of team members to select the team member whose task list you wish to access. Upon selecting a team member, the working area updates to display the task list of the selected team member.*

TEAM MEMBER

Peter Parker

Subject

## Adding a Task

To add a task:

1. In the main menu, click **Task List** (if it's not already open), then click **Add Task**.
2. Enter a subject (short description of the task). The subject, along with contact (if assigned), will be shown in the various task lists.
3. Enter the task start and due dates if applicable.



*Use the Assign To drop-down list to select the team member task list to which the task will be added. You can assign a task to any team member who is sharing their task list.*

4. If you want to receive a reminder about this task, select the **Reminder** check box and indicate when you want to receive the reminder.

**Note** If you want to receive email reminders, you must have the email reminders enabled in your [user profile](#). If you are using [wireless synchronization](#), you will automatically receive the reminders on your wireless device and no longer need to receive email reminders.

5. Some tasks may take a while for you to complete, or may be dependent on others. To keep track, select the task **Status**, and enter the **Complete %**.

**Note** The **Status** and **Complete %** fields are linked: if you enter "100", the Status changes to "Complete" (and vice versa). Similarly, if you enter "0", the Status changes to "Not Started", and if you enter a number greater than "0" and less than "100", the Status changes to "In Progress".

6. Select the **Priority** of this task.
7. If applicable, click the **Select Contact** button to select the contact involved in this task. Use the simple search form to locate the appropriate contact. If you want to remove the assignment of the contact to the task, click the **Remove Contact** link.

**Note** Tasks opened on a mobile device include the contact name appended to the subject line (e.g. *subject \*[contact name]\**). This is done to facilitate the attaching of contacts to tasks with wireless synchronization. *If possible, do not edit the subject line on your mobile device, otherwise the subject may become incorrectly formatted.*

8. If the task is recurring, select the **Recurring** check box and enter the recurrence information.
9. Add any other notes about the task.
10. Click **Save**.

## Calendar

### Using the Calendar

Use the Calendar to view or add appointments.

Click **Calendar** in the main menu.

Use the controls at the top of the calendar to change the view to Day, Week, or Month. The controls at the top left allow you to navigate to the previous or next day (or week or month, depending on the current view).

To view a specific date, click the current displayed date at the top left and use the date selector. The single arrows change the month. You can also click the month and year title in order to quickly navigate to another month/year.

To view or edit the details of an appointment shown on the calendar, click the appointment. See [Adding an Appointment](#) for information about the appointment record fields. When you are finished, click **Save**, **Delete** or **Cancel** as appropriate. You are returned to the calendar where you started.

**Tip** You can view a list of today's appointments on your Home page.



*As a member of a team, you have full access to the calendars of other team members who are sharing their calendar. Use the drop-down list of team members to select the team member whose calendar you wish to access. Upon selecting a team member, the working area updates to display the calendar of the selected team member.*

The screenshot shows a user interface for selecting a team member and a date. At the top, there is a label "TEAM MEMBER" above a dropdown menu. The dropdown menu is currently displaying "Peter Parker" and has a small downward arrow on the right side. A mouse cursor is pointing at the dropdown. Below the dropdown is a date selector with a left arrow, the text "24 May 2018", and a right arrow.

### Adding an Appointment

1. Click **Calendar** in the main menu (if it's not already open), then click **Add Appointment**.
2. Enter a subject (short description of the appointment). The subject, along with the contact (if assigned), will be shown on your calendar.



*Use the Assign To drop-down list to select the team member calendar to which the appointment will be added. You can assign an appointment to any team member who is sharing their calendar.*



3. If applicable, select the contact involved in this appointment by clicking the **Select Contact** button. Use the simple search form to locate the appropriate contact. If you want to remove the assignment of the contact to the appointment, click the **Remove Contact** link.

**Note** Appointments opened on a mobile device include the contact name appended to the subject line (e.g. *subject \*[contact name]\**). This is done to facilitate the attaching of contacts to appointments with wireless synchronization. *If possible, do not edit the subject line on your mobile device, otherwise the subject may become incorrectly formatted.*

4. Enter the start and end time of the appointment and, if appropriate, select the **All Day Event** check box.
5. If the appointment is recurring, select the **Recurring** check box and enter the recurrence information.
6. If you want to receive a reminder for this appointment, select the **Reminder** check box and indicate how many minutes, hours or days ahead of the appointment you should receive the reminder.

**Note** If you want to receive email reminders, you must have the email reminders enabled in your [user profile](#). If you are using [wireless synchronization](#), you will automatically receive the reminders on your wireless device and no longer need to receive email reminders.

7. Select an option, in the **Show time as** field, to indicate how firm this appointment is. This will help to identify if you might still be available during this time.
8. Enter any additional notes about this appointment.
9. Click **Save**.

## Active Business

### About Active Business

Active Business helps you stay on top of active listings and buyers. For each property listing you can include details about the property, record closing dates and details about an offer, track commissions, schedule reminders for critical dates, track related parties and showings, and upload and store important documents.

Substantiate your value by tracking the work you do to sell a property (or to find a property for an active buyer) and presenting the contact with a report detailing your work.

To get the most out of Active Business, you will want to:

- [Record properties your contacts currently own](#)
- [Identify contacts as prospective buyers](#)
- [Create listings](#)
- [Record and report the work you have done](#)
- [Record property sales](#)
- [Identify related parties](#)
- [Record showings](#)
- [Upload and store listing-related documents](#)
- [Update a listing's status after a sale](#)

### Viewing All Active Business Listings and Prospective Buyers

Click **Active Business** in the main menu.

The List of Active Business shows three sections. The Active Listings and Buyers section includes all Potential, Active, Sold, and Pending listings. The Prospective Buyers section includes all of your contacts who are actively looking for a property (the Prospective Buyer setting is selected in the Properties tab of their contact record). The Business History section includes all Closed, Canceled, Expired, and Withdrawn listings.

**Note** The Active Listings and Buyers and Prospective Buyers lists are also available on your [Dashboard](#) for quick reference.



*If I want to remove a listing, should I delete it or change its status to Canceled or Withdrawn?*

If you created a listing in error, or were experimenting with the system and created test data, you can delete a listing from the Active Listings and Buyers list. Deleted listings are sent to the [Recycle Bin](#), where they can be later restored if necessary.

If a listing is real and you want to properly track and build a history, you should change its status instead.

## Identifying a Contact as a Prospective Buyer

If a contact is actively looking for a new property, mark them as a Prospective Buyer on their Properties tab. Prospective buyers are included on the Active Business list and can be added to your Dashboard.

To set a contact as a Prospective Buyer:

1. On the contact's Properties tab, in the Buying Preferences section, select **This contact is a Prospective Buyer** check box.



*Use the drop-down list to select the Buyer Agent from a list of team members.*

2. If you have a Buyer Agency agreement, enter the expiry date. Indicate whether you want the expiry date to appear in your calendar and whether you want to receive a reminder.



*The buyer agency expiry date appointment is automatically created in the calendar of the selected buyer agent. If you wish, you can also add the appointment to the calendar of another team member by selecting a second team member from the drop-down list to the right of the buyer agent.*

3. Complete as many of the contact's preferences as you are able, particularly the **Building Type** and **Price Range**, which will be shown on the [Active Business list](#) and [Dashboard](#) so you can see at a glance if a property you learn about might be of interest to a contact.
4. Click **Save**.

**Note** When this contact buys a property, the **This contact is a Prospective Buyer** check box is automatically cleared when the property listing status is changed to "Closed". For more information, see [Recording a Property Sale](#).

## Creating a Listing

**Note** Before you can create a listing for a property, you must add the property to their contact record - see [Keeping Track of a Contact's Properties](#).

To create a listing:

1. On the contact's Properties tab, in the Properties Summary section, click the **Create Listing** icon beside the property for sale. (There will not be a **Create Listing** link if this property status is "Once Owned". If the property is already listed in Active Business, there will be a **View Listing** icon that you can click to open the listing directly from the properties summary list.) The Add Active Business screen appears.
2. Enter the **Asking Price**, and the **Listing Start** and **Expiry** dates.



*Use the drop-down list to select the Listing Agent from a list of team members.*

3. Indicate whether you want the listing expiry date to appear in your calendar and whether you want to receive a reminder.



*The listing expiry date appointment is automatically created in the calendar of the selected listing agent. If you wish, you can also add the appointment to the calendar of another team member by selecting a second team member from the drop-down list.*

4. Complete as many of the remaining fields as you wish.

**Note** If you enter the commission percentages, the commission amounts are automatically calculated based on the asking price. Alternatively, you can enter the commission amounts directly.

5. The property information below the **Create Listing** section comes directly from the contact's property record; any changes entered here are reflected in the contact's property record.
6. Click **Save**. The property listing is added to the [Active Listing and Buyers list](#).

## Recording and Reporting Your Work

Sometimes a contact doesn't realize how much work you do for them. It's easy to track your listing-related activities and give them a Service Report.

To track your work:

1. Click **Active Business** in the main menu.
2. Click the **Add/Edit Notes** icon beside the listing (or prospective buyer). (Any previous notes are displayed in the bottom half of the screen -- use the Edit or Delete links to modify or delete previously entered notes for the listing.)
3. Uncheck the box if you do not you wish to display the note on the Service or Summary Report.
4. Change the date and time, if necessary, and enter the text of your note.
5. Click **Save**.
6. Enter another note, or click **Close**.

To create a report of the listing information along with all notes entered, click **Service Report** beside the listing.

To create a report for the prospective buyer of all the notes entered, click **Summary Report** beside the buyer.

## Recording a Property Sale

### If you are representing the buyer

When a contact has made an offer on a property, you can create a listing for it that includes information about the sale.

To create a listing to record a property sale (representing buyer):

1. In the Properties Summary section of the contact's Properties tab, or in the Active Business screen **Prospective Buyers** list, click **Buy Property**. The screen changes to the Active Business - Create Listing screen.
2. In the popup, enter the property **Address** and click **Continue**.
3. Indicate the property listing **Status**, **Asking** and **Selling Price**, **Buying Commission**, **Offer Accepted Date**, **Closing Date** and **Move In Date**. Complete as many of the other fields as you wish.



*Use the drop-downs to select the Buyer Agent and Buyer Closing Agent from a list of team members.*

**Note** If you enter the commission percentages, the commission amounts are automatically calculated based on the selling price. Alternatively, you can enter the commission amounts directly.

**Note** You can enter additional key dates that are not explicitly defined under the **Other Key Dates** section on the page. Simply click the **Add Key Date** link and enter the date details including whether you want to include it in your calendar, and click **Add**. Click the **Edit** link next to a date in order to update the date details, or click the **Delete** link to remove a date.

4. Indicate whether you want each key date to appear in your calendar and whether you want to receive a reminder.



*Each key date appointment is automatically created in the calendar of the buyer closing agent. If you wish, you can also add each appointment to the calendar of another team member by selecting the team member from the drop-down list.*

*These appointments are also added to the calendar of the additional team member selected on the main listing screen.*

5. Click **Save**. The property listing is added to the [Active Listings and Buyers list](#) and the contact's Properties tab with a status of "Buying".

For information about updating this listing, see [Updating a Listing's Status after a Sale](#).

## If you are representing the seller

To update a listing to record a property sale (representing seller):

1. In the **Active Listings and Buyers** list (or Dashboard widget), click the address link of the property listing.
2. Change the property listing **Status** as appropriate.
3. Enter the **Selling Price, Selling Commission, Offer Accepted Date,** and **Closing Date.** Complete as many of the other fields as you wish.

**Note** If you enter the commission percentages, the commission amounts are automatically calculated based on the selling price. Alternatively, you can enter the commission amounts directly.

**Note** The **# Days on Market** is calculated based on the **Start Date** and **Conditions Waived Date** (or **Offer Accepted Date** if the Conditions Waived Date is not entered).

**Note** You can enter additional key dates that are not explicitly defined under the **Other Key Dates** section on the page. Simply click the **Add Key Date** link and enter the date details including whether you want to include it in your calendar, and click **Add**. Click the **Edit** link next to a date in order to update the date details, or click the **Delete** link to remove a date.



*Each key date appointment is automatically created in the calendar of the seller closing agent. If you wish, you can also add each appointment to the calendar of another team member by selecting the team member from the drop-down. These appointments are also added to the calendar of the additional team member selected on the main listing screen.*

4. Click **Save**.

For information about updating this listing, see [Updating a Listing's Status after a Sale](#).

## If you are representing both

To create a listing to record a property sale (representing buyer and seller):

1. In the **Active Listings and Buyers** list (or Dashboard), click the address link of the property listing.
2. When the property listing **Status** is changed to "Sold" or "Pending", change the **Agent Representing** to "Both".
3. Click **Select Buyer** to select the contact record of the buyer. *The buyer must exist in your contact list.*
4. Enter the **Selling Price, Selling Commission, Buying Commission, Offer Accepted Date, Closing Date,** and **Move In Date.** Complete as many of the other fields as you wish.

**Note** If you enter the commission percentages, the commission amounts are automatically calculated based on the selling price. Alternatively, you can enter the commission amounts directly.

**Note** You can enter additional key dates that are not explicitly defined under the **Other Key Dates** section on the page. Simply click the **Add Key Date** link and enter the date details including whether you want to include it in your calendar, and click **Add**. Click the **Edit** link next to a date in order to update the date details, or click the **Delete** link to remove a date.



*Each key date appointment is automatically created in the calendars of the buyer closing agent and seller closing agent. If you wish, you can also add each appointment to the calendar of another team member by selecting the team member from the drop-down. These appointments are also added to the calendar of the additional team member selected on the main listing screen.*

5. Click **Save**. The property is added to the buyer's contact Properties tab with a status of "Buying". The listing appears twice in the **Active Listings and Buyers** list, once under the seller's name and once under the buyer's name. *The two entries represent the same listing. You can open either entry to update the listing.*

For information about updating this listing, see [Updating a Listing's Status after a Sale](#).

## Identifying Related Parties

To enter the related parties involved in a sale, including other agents, home inspectors, mortgage brokers, etc.:

1. From the listing's Related Parties tab, click **Add Related Party**.
2. Select the contact.

If the related party is in your contact list but has not been set as a Frequently Used Related Party, click the Select link and find and select the contact.

If the related party is not in your contact list, select **Add Related Party not in Contact List** and enter the contact details. If you wish to add the contact to your contact list on-the-fly, simply select the Add to Contacts check box and indicate whether this is a Frequently Used Related Party.

If the related party is in your contact list and set as a Frequent Used Related Party, you can select them from this list.

3. Select the **Role**.

**Note** The Role list is the same list as your Business Type list. To add new roles, click **Modify List**.

If you select a contact from the list of Frequently Used Related Parties, the Role defaults to the Business Type of the selected contact.

4. Click **Save**.

If a related party is in your contact list, you can click the name in the list to go directly to the contact record.

To edit a related party, click the **Edit** icon next to the name.

To delete a related party, click the **Delete** icon next to the name. *If the related party is in your contact list, the contact record is NOT deleted.*

## Recording Showings

To record information on property showings:

1. From the listing's Showings tab, click **Add Showing**.
2. Select the **Type** of showing.

**Note** To manage the list of showing types, click **Modify List**.

3. Select the **Showing Agent**.

If the showing agent is not in your contact list, enter the contact details. If you wish to add the contact to your contact list on-the-fly, simply select the Add to Contacts check box.

If you are the showing agent, simply select **Me**.

If the showing agent is in your contact list, select **Select from Contact List**, click the Select link and find and select the contact.



*The **Me** option is replaced by a drop-down list for the selection of a team member.*

4. Select the date and time of the showing.
5. Enter any showing details.
6. Click **Save**.

If the showing agent is in your contact list, you can click the name in the list to go directly to the contact record.

To edit a showing record, click the **Edit** icon next to the name.

To delete a showing record, click the **Delete** icon next to the name. *If the agent is in your contact list, the contact record is NOT deleted.*

## Uploading Documents Related to a Listing

To upload and store important documents related to a listing:

1. From the listing's Documents tab, click **Add Document**.
2. Click the **Upload File** button to select the file from your computer.

**Note** Files cannot be larger than 10MB each. Click the **Accepted File Types** link in order to see a list of file extension types that you can upload.

3. Select the **File Type** from the list.

**Note** To manage the list of file types, click **Modify List**.

4. Enter a description of the file.
5. Click **Save**.



To open or download the file to your computer, click the file name in the list, or click the **Download** icon.

To edit a file details, click the **Edit** icon next to the file name.

To delete a file, click the **Delete** icon next to the file name.

**Note** It is very important that you maintain and backup a copy of all uploaded documents on your own computer.  
If you delete a listing, all related uploaded documents are also deleted.

## Updating a Listing's Status after a Sale

To update a property listing, in the [Active Listings and Buyers list](#) (or Dashboard) click the address link of the property listing.

### If you are representing the buyer

When the listing status changes to:

- "Closed" - the ownership status on the contact's Properties tab changes from "Buying" to "Own", and the buyer's **Prospective Buyer** setting is cleared (in the Buying Preferences tab). In the property record, the **Purchase Date**, **Move In Date**, and **Purchase Price** are updated to reflect the **Closing Date**, **Move In Date**, and **Sale Price** from the listing. You are also asked if you want the buyer's home address and move-in date updated to reflect the purchased property. If you do not because the buyer is not moving in until a later date, remember to set a Move In Date reminder and to change the buyer's home address information on the move in date.
- "Canceled", "Expired", or "Withdrawn" - the listing property is removed from the buyer's Properties tab.

For any of these statuses, the listing is removed from the **Active Listings and Buyers** list and recorded in the contact's [business history](#).

### If you are representing the seller

When the listing status changes to:

- "Closed" - the ownership status on the contact's Properties tab changes from "Own" to "Once Owned". If this was the contact's primary residence, that setting is cleared. In the property record, the **Sale Date** and **Sale Price** are updated to reflect the **Closing Date** and **Sale Price** from the listing.
- "Canceled", "Expired", or "Withdrawn" - the listing is removed from the **Active Listings and Buyers** list.

For any of these statuses, the listing is recorded in the contact's business history.

### If you are representing both

When the listing status changes to "Closed":

- Seller - the ownership status on the contact Properties tab changes from "Own" to "Once Owned". If this was the seller's primary residence, that

setting is cleared. In the property record, the **Sale Date** and **Sale Price** are updated to reflect the **Closing Date** and **Sale Price** from the listing.

- Buyer - the ownership status on the contact Properties tab changes from "Buying" to "Own", the buyer's **Active Buyer** setting is cleared, and on the property record, the **Purchase Date**, **Move In Date**, and **Purchase Price** are updated to reflect the **Closing Date**, **Move In Date**, and **Sale Price** from the listing. You are also asked if you want the buyer's home address and move-in date updated to reflect the purchased property. If you do not because the buyer is not moving in until a later date, remember to set a Move In Date reminder and to change the buyer's home address information on the move in date.
- The listing is removed from the **Active Listings and Buyers** list.

If the listing status is changed to "Canceled", "Expired", or "Withdrawn", the listing is removed from the **Active Listings and Buyers** list and the listing property is removed from the buyer's Properties tab.

For any of these status changes, the listing is recorded in both contact's business history.

### If a sale falls through

A listing can be changed from "Sold" back to "Active". As a result:

- All selling fields are removed.
- If the **Agent Representing** is "Both", it is changed back to "Seller", the link to the buyer contact is removed, and the property record is removed from the buyer contact's Properties tab.

### Assigning an Activity Plan to a Listing

To assign a Listing or Closing Activity Plan to an Active Business listing:

1. From the listing's Activity Plans tab, click **Assign New Activity Plan**.
2. Enter the plan start / event date (defaults to the current date).
3. Select whether to assign a Listing or Closing plan.
4. To search for the desired plan, select the method of correspondence from the list and/or enter a keyword in the plan name and click the magnifying glass icon to limit the list of plans to select from.
5. Click the check box next to the plan you wish to select and click **Continue**.
6. The next screen displays a list of the plan tasks and the due date automatically assigned to each task. If necessary, prior to assigning the plan, you can modify the automatically assigned date for each task, or remove the check in the Include column to exclude the task altogether.

**Note** If the Include box is unchecked and the due date is not automatically assigned for a given task, this means that the date on which task is based has not been entered for the listing. If you still wish to create the task, simply select the desired due date and check the Include box.

**Note** At this point nothing has actually been assigned or created. If for some reason you do not wish to assign the plan, click **Cancel**. If you wish to assign a different plan or change the plan start date, click **Back** and return to step 2.



*Each task includes an Assign Task To drop-down list for the selection of the team member to which each task is to be assigned. For email and letter tasks, an additional Send From drop-down list provides for the selection of the team member's branding to use for the email or letter. The default assignments are based on the set up of the activity plan. The top of the page includes drop-down lists and Update buttons to allow you to easily update the Assign Task To and/or Send From team member selections for all activity plan tasks.*

7. If you are representing both the Seller and Buyer, indicate which party the tasks are to be assigned to.
8. Click **Assign Plan and Create Selected Tasks**.

For information on viewing and completing activity plan tasks assigned to a listing, see [Viewing the Activities for a Listing](#).

## Viewing the Activities for a Listing

The Activity Plans tab lists all plans that have been assigned to the listing. If you want to unassign a plan, click **Unassign plan and delete incomplete tasks** next to the plan in the list. The plan is unassigned and incomplete tasks are deleted. Completed tasks created from the plan are not deleted and remain in the listing's Completed Activities list.

Select the **Pending** option in the Activities tab to display all incomplete tasks, as well as all upcoming key dates for the listing that you have included in your calendar, such as the listing expiry date or closing date.

Select the **Completed** option to display all complete tasks as well as past key dates you have included in your calendar.

**Note** If a task is created from an activity plan (see [About Activity Plans](#)) the activity plan name and the activity type are included in the list. If the activity type is Email or Letter, an icon will appear next to the due date. Click the icon if you wish to send the email or print the letter. Upon clicking the icon, you have the option to update the task to Completed.

## Mass Email

### About Mass Email

Sending emails to your prospects and clients has never been easier. With our Mass Email feature, simply compose your message, add an attachment if required, and then select the recipients from your contact list. Personalized emails are automatically created and emailed to each of your contacts.

To get you started, IXACT Contact comes loaded with hundreds of pre-written email templates. You can either use the pre-loaded templates just as they are, modify them to your needs, or create your own templates from scratch. For more information, see [Using Email Templates](#).

### Best Practices for Communicating with Contacts

Before you create a mass email message or letter, be sure you have thought about your contacts - is this something they really want to know, or just something you want to tell them? Is this information best presented in email form, or would a more formal letter be more appropriate?

Choose your recipients carefully - sending everything to everybody can fatigue the relationship.

Be sure you have entered full mailing addresses for all contacts to whom you want to send letters, and email addresses for those you want to include in email communications.

#### For letters

- Compose your letter with your reader in mind. Keep your message short and to the point.
- Be sure to preview the letter before printing it.
- If your letter is likely to be sent again (for example, a yearly invitation to a golf tournament), consider saving it as a template. You can then re-use it again and again. For more information, see [Using Letter Templates](#).

#### For emails

- Compose your email with your reader in mind. Keep your message short and to the point.
- Develop an effective subject line, something that will grab your reader's attention and make them want to open the message.
- Send the email to yourself first to preview it. Be sure everything looks perfect before sending the message to your contacts.
- If your message is likely to be sent again (for example, a notice about an open house), consider saving it as a template. You can then re-use it again and again. For more information, see [Using Email Templates](#).

## Creating a Mass Email Message

To create an email message:

1. Click **Mass Email** in the main menu.
2. If you want to use an existing email template, click the template name link. Templates are divided into predefined categories: Marketing, Listing, Closing, and Other. You can search your templates by selecting the category from the list at the top of the page, and/or by entering a keyword and clicking the magnifying glass. To create a new email, simply click **Create New Email**.
3. Click **Select Contacts** to choose who you want to receive the email message (see [Selecting Contacts](#)).

**Note** If you only want to include contacts whose preferred method of correspondence is Email, click the check box at the top of the search screen.

The list only includes contacts that have at least one email address flagged as **Send Mass Email** and, by default, only contacts who have **Accepts Mass Emails** selected. *If you want to include contacts who do not accept mass emails, check the **Include Contacts set to NOT Accept Mass Emails** box. Upon sending the email, you will be presented with a list of the selected contacts that do not accept mass emails and a warning about sending mass emails to these contacts. You can either reselect the recipients or send the emails anyway. **Please ensure that you are not sending email messages that violate any laws and/or regulations pertaining to junk email, spam or unsolicited email.***

All mass emails include an **Unsubscribe** link. If the recipient clicks the link, their contact record **Accepts Mass Emails** setting will be automatically updated to "No". By default, the contact will not be included for future mass emails.

4. Enter a compelling **Subject** line.
5. Choose whether to **Include** or **Exclude** your email header. (For instructions on how to set up your personal email header, see [Setting Up Your Email Header](#).)



*Use the From drop-down list to select the team member branding to use for the email. The branding includes the email header, signature and the From email address.*

6. Choose whether to **Include** or **Exclude** the letter salutations defined in each contact's profile. Including letter salutations means your email messages will begin as a letter does, for example, "Dear Mary". This choice is a matter of personal style.
7. Choose the font type and size of the salutations. This can be different from the font and size used for the body of the email.
8. Enter the body content of your message using the formatting tools to change the way the content looks. The *wysiwyg* ("what you see is what you get") [content editor](#) provided for formatting the content has many of the same

features as word processor software like Microsoft Word. If you're not sure what a tool does, hover over the buttons with your mouse and the name of the function will appear. Experiment to get the look you want. Remember that, depending on the email system a contact uses, they may or may not be able to see this formatting.

9. Choose whether to Include or Exclude your signature at the bottom of the email. (For instructions on how to set up your signature, see [Creating a Signature for Your Emails and Letters](#).)
10. Choose whether to Include or Exclude social media share buttons in your email.

**Note** Social media share buttons allow the recipients of your email to share it via various social channels, allowing you to increase its reach.

11. If you wish to include an attachment, click **Upload Attachment** then, in the popup screen, click **Select File** to select the file from your computer, then click **Upload**. *File attachments cannot be larger than 5MB.*

**Note** For email deliverability reasons, attachments are not actually sent with your emails. The attachment file is stored on the IXACT Contact servers and a hyperlink to the file is included in the email. Recipients of the email will click on the hyperlink in order to download and open the file. The file is stored on our servers for 60 days after the email is sent.

Please preview the email to see how attachments are included in the body of the email and write the body content accordingly to refer to the attachment hyperlink.

*Attachments sent in this manner dramatically decreases the chances of your emails going to junk mail and therefore significantly increases the chances of your contacts receiving and opening your email communications.*

12. By default, an entry will be added to the Contact History tab of each contact that you sent this email to. If you do not want to do this, select "No" next to **Record in contact history log for each selected contact**.
13. Choose whether you wish to send your email now, or, if you would like to send in the future, select **Schedule At** and choose the desired date and time.

**Note** If you schedule an email, you can cancel it prior to the scheduled time by clicking the Cancel link in the Pending Scheduled Campaigns list in [Email Campaign Reporting](#).

14. Click **Send Preview To** send the message to yourself first (change the email address for the preview if desired; this does not change your User ID for signing in to IXACT Contact).
15. Check your email inbox to see how the message will look to your other recipients.
16. Make any changes necessary (and preview again if you want to). When you are satisfied with your message:

- If you want to save this message to use again in the future, click **Save Email as Template**. Everything is saved except the selected contacts and the attachment. For more information, see [Using Email Templates](#).
- When you are ready to send the message to the selected contacts, click **Send**.

**Note** You will receive a confirmation email once your emails have been queued to be sent to your contacts.

## Using Email Templates

### Creating an email template

To create an email template:

1. Create an email message as described in [Creating a Mass Email Message](#), but write it in a generic way, so it can be reused.

**Note** If you are also going to send this message now, select the contacts to send it to. If you are only creating a template for future use, you do not need to select the contacts. Each time you create a message based on a template you must select the contacts at that time.

2. When the message is complete, preview it and then click **Save Email as Template**.
3. You are prompted to enter a name and select from one of the predefined categories (Marketing, Listing, Closing, Activity Plans, Greeting Cards and Other) for the template. In order to more easily identify what the template contains when you are viewing the list of templates, you should also enter a description.
4. Click **Save**. Everything is saved except the selected contacts and the attachment if included.



*All team members share the same set of email templates. The From (team member branding) selection is not saved with email templates.*

5. The email message remains open. If you want to send this message now to the selected contacts, click **Send**. Otherwise, click **Cancel**.

Your new template is listed in the Mass Emails tab.

### Updating or copying a template

To update or copy an email template:

1. On the Mass Emails tab, click the name link of the template you want to update or copy.
2. Make the changes as required, and then click **Save Email as Template**.
3. To update the template, click **Save** without changing the name. To create a new template, change the name, category and description as required, then click **Save**.

## Creating a message based on a template

To create an email message from a template:

1. In the Mass Emails tab, click the name link of the template you want to use. Templates are divided into predefined categories: Marketing, Listing, Closing, Activity Plans, Greeting Cards and Other. You can search your templates by selecting the category from the list at the top of the page, and/or by entering a keyword and clicking the magnifying glass.
2. The email opens in the Create Mass Email tab.
3. Select the contacts to send the message to and, if desired, select an attachment.
4. Make any other changes as required. Note that this does not affect the template, which is just a starting point.
5. If you want to update or copy the template, click **Save Email as Template**. To update the template, click **Save** without changing the name. To create a new template, change the name, category and description as required, then click **Save**.
6. Complete as described in [Creating a Mass Email Message](#).

## Customizing the Current Monthly e-Newsletter Issue

IXACT Contact includes a professionally written and designed Monthly e-Newsletter that you can set up and schedule to be automatically sent to your contacts each month using a built-in Global Keep In Touch event (see [Setting Up the Monthly e-Newsletter Event](#)).

On approximately the 26th day of each month you will receive an email notification that the e-Newsletter content for the next month's issue has been uploaded to your account. Upon receiving the notification, if you are sending an e-Newsletter for the month, make sure you set up your e-Newsletter at least a couple of days prior to the auto-send date that you have selected in the global keep in touch event.

**Note** If you do not intend to customize the personal message and you have already selected your contacts, then you do not need to do anything and your e-Newsletter will be automatically emailed on your selected auto-send day.

To set up the current month's e-Newsletter issue, click **Mass Email** in the main menu and then click the **Monthly e-Newsletter** tab.

If you wish to customize your personal message for the issue, start by clicking the **Customize Personal Message** link. The page will open up with the same content editor that is used to create Mass Emails. For instructions on using the editor, see [Using the Content Editor](#). You will notice that the default personal message starts with the full salutation merge field for the contact-specific personalization of your e-Newsletter. The same contact-specific merge fields are available as with regular mass emails. All the features of the content editor are available to you so you can either fine-tune the default personal message to your liking, or create your own message that can include images, hyperlinks and whatever formatting that you want to apply.

You can also customize the pre-loaded articles for the issue by clicking the **Customize Articles** link. To add your own article, click **Add Article** at the top of the



page. An article is made up of four separate parts: Article Title; Article Introduction; Balance of Article; and Article Image. The Article Introduction and Balance of Article can be edited using the same content editor that is used to create Mass Emails. For instructions on using the editor, see [Using the Content Editor](#). The Article Image is uploaded and inserted using the content editor image manager. Be sure to click **Save** when done. To exclude a pre-loaded article, click **Exclude** above the article. To edit a pre-loaded article, click **Edit** above the article. Excluded pre-loaded articles as well as the original version of edited pre-loaded articles are moved to the **Excluded Standard Articles** section at the bottom of the page; to add them back to your e-Newsletter, click **Include**.

You can also enter a unique email Subject for the issue and indicate whether you want to include or exclude your email header, signature, and social media buttons. The defaults for these settings come from your global keep in touch event setup, but can be overridden for each issue if you wish.



*Use the From drop-down list to select the team member branding you wish to use for the current issue. The branding includes the email header, signature and the From email address. This selection defaults to the Global Keep in Touch event setting, but can be overridden at the issue level.*

You can click the **Preview** link at any time to see what your e-Newsletter will look like. You can also click **Save & Send Preview To** in order to send yourself an actual email preview. When you have finished setting up the month's issue and you are satisfied with how it looks, click **Save** at the top of the page.

The page displays how many contacts are currently assigned to the keep in touch event. If you wish to reselect your e-Newsletter recipients, click the **Open Global Keep in Touch Event** link, scroll to the bottom of the page and click **Choose contacts who are participating in this event**.

The page also displays the number of available mass emails that you currently have. If you have set up the global keep in touch event such that your e-Newsletter will not be sent if you do not have enough available emails, and you need to purchase emails in order to send your e-Newsletter to all of your selected contacts, simply click the **Purchase Emails** link and purchase the number of emails you require. For more information on purchasing emails, see [Purchasing More Emails](#).

**Note** If you are setting up your e-Newsletter prior to the start of the issue month, remember that 2,500 additional free emails will be added to your account at the beginning of the month.

If necessary you can also change the auto-send day for the month's issue, or if you do not wish to send the month's issue at all, select the **Unscheduled** choice at the top of the Auto-Send Day drop-down list.

**Note** Although you can select the time at which you wish to send your e-Newsletter, all e-Newsletter issues are submitted to the sending queue at 2:00AM Eastern time on your auto-send day. **Any changes to your e-Newsletter content (i.e. subject, personal message, email header or signature), or the contacts assigned to receive it, must be made prior to 2:00AM Eastern time on your auto-send day.**

When your e-Newsletter emails are auto-sent, you will receive an email confirmation and an entry will be added to the Contact History of each contact in your recipient

list. Also, the campaign reporting area of Mass Email will include all the valuable statistics for your e-Newsletter. (For more information, see [Email Campaign Reporting](#).)

Previous issues appear in the e-Newsletter History list at the bottom of the page, even if they were not auto-sent. If the issue was auto-sent, the list includes the send date, as well as the number of contacts to which it was sent. You can view previous issues at any time by clicking the **View** link in the list. If you wish to re-send an e-Newsletter, you can do so at any time by clicking the **Resend** link in the list. Select the contacts who you wish to re-send the issue to, and then click **Resend Newsletter**. Click **Close** to return to the Monthly e-Newsletter page.

## Purchasing More Emails

IXACT Contact provides you with up to 2,500 emails per month at no charge. The number of emails you currently have available is displayed at the top of the Create Mass Email screen.

**Note** Auto-send (drip) emails created from activity plans are always provided at no charge and are not deducted from your available emails.



*A team's total number of no-charge emails per month is calculated as the number of active team member accounts multiplied by 2,500; i.e. if there are four active members in your team (including the Team Leader), your team gets 10,000 no-charge emails.*

You may purchase more emails at any time by clicking the **Purchase Emails** button. In the pop-up window, click the **Purchase** button next to the number of emails you wish to purchase. The more you choose to purchase, the lower the cost per email. *Your purchased emails will never expire and can be used at any time.* The credit card we have on file for you will be charged the total cost of the emails.



*Each individual team member is charged for their own email purchases. Any team member can purchase emails, and all no-charge and purchased emails are available to use by any member of the team.*

**Note** If you try to send an email to more contacts than the number of emails you currently have available, the Purchase Emails popup will appear when you click **Send**. Upon purchasing enough emails you will immediately be able to send out your email.

## Email Campaign Reporting

IXACT Contact provides robust reporting and analytics for your mass email campaigns.

To access your mass email campaign reporting, click **Mass Email** in the main menu and then click the **Campaign Reporting** tab.

**Note** The page initially displays the reporting on your mass emails. To see a list of opened auto-sent marketing activity plan emails and birthday and anniversary e-cards, select the **Auto-Email Opens** option at the top of the page. For each opened email the list displays the contact who opened the email, the email Subject line and activity plan if applicable, and the date and

time the email was opened. You can use the search fields at the top of the list to search by open date or perform a keyword search on the email Subject line.

The **Overall Deliverability Summary** page displays your summarized deliverability statistics for a selected range of months (defaulting to the current month), as well as a list of individual campaigns and summarized statistics for each. To change the months you wish to report on, select the start and end month and year and click **View Results**.

**Note** Not all email programs allow for the tracking of message opens. Therefore, the message opens and open rate statistics usually understate the success of your email campaigns. This also applies to the number of recipients who clicked the links in your emails and forwarded your emails.

You can view any sent email by clicking the **View** link in the Statistics & Reports list.

The Pending Scheduled Campaigns list displays scheduled emails that have not yet been sent. You can preview or cancel a scheduled email by clicking the links in the list.

To view more detailed statistics for a specific campaign, simply click the email subject in the list. (You can click the **Message List** link in the top right corner at any time to return to the Overall Deliverability Summary page.)

The **General Stats** page displays the summarized statistics for the campaign including useful graphs that let you know when your message was opened. Click the **Details** link next to Recipient List to see a complete list of the recipient names and email addresses. Click the **Details** link next to Unique Open Details to see the individual names and email addresses of the recipients who opened the email.

If you would like a webpage version of your email that you can add to your website or include in a future email, simply copy the **Webpage Version** link below the General Statistics area.

The **Bounce-Back Stats** page provides detailed information on your bounced emails (those that did not reach the recipient). Click the **Details** link for each bounce back type to see the individual contact names and email addresses that got bounced.

The **Link Analysis** page provides statistics on how many recipients clicked the hyperlinks in your email. Click the **Details** link to see the individual names and email addresses of each recipient who clicked on the link.

## Canada's Anti-Spam Legislation (CASL)

Canada's anti-spam legislation, known as CASL, applies to all commercial electronic messages, or CEMs, including emails and text messages.

CASL rules apply to the content of electronic messages, and your permission to send messages to individual recipients.

All messages must include the following:

- An unsubscribe mechanism
- The sender's business address
- The sender's phone number, email address or website address

CASL also requires senders of electronic messages to have consent from each recipient prior to sending them messages.

There are two types of consent:

**Express consent** is explicitly granted by the recipient by positively responding to a request for consent. Express consent can be obtained electronically, verbally or in writing. Once express consent has been obtained, it never expires, unless the individual subsequently unsubscribes.

**Implied consent** exists in the following situations:

- The recipient has been a customer within the past two years
- The recipient has made an inquiry about your services within the last six months
- The recipient provided you with their email address
- You have a personal relationship with the recipient
- You have an existing business relationship with the recipient
- The recipient conspicuously publishes their email address on a website or elsewhere, and have not indicated that they do wish to receive electronic messages
- If someone has referred you to the recipient, you are permitted to send them one email without obtaining express consent.

Unlike express consent, implied consent can expire, at which point you are no longer allowed to send electronic messages, including those with the intention of obtaining express consent. For this reason, it is recommended that you attempt to obtain express consent from your contacts, even those for which you currently have implied consent.

IXACT Contact includes a number of features to help you comply with CASL rules. We recommend that you take advantage of these features.

## Text Marketing

### About Text Marketing

As it gets increasingly difficult to get into the email inbox, and actually have your emails opened and read, texting and text marketing are becoming an increasingly valuable tool to ensure that your important messages are being received and viewed in a timely manner. People open and view 100% of their text messages, and the response rate to text messages is significantly higher than that of email messages.

IXACT Contact provides you with the means to engage in texting communications with both individual contacts, as well as groups of contacts by using the Mass Texting feature. You can also set up a text auto-responder to immediately respond to your leads who provide you with a mobile phone number.

Since text messaging is considered to be a private permissions-based form of communication, it is recommended that you are selective with the messages that you send and to whom. Here are some best practices to apply when sending text messages:

- Only text those contacts that have provided consent to receive your text messages.
- Since your texts will not come from your own mobile number, be sure to let your recipients know who the text is coming from.
- Only send personalized, relevant and timely messages to your contacts.
- When you send a contact their first text message from IXACT Contact, provide instructions on how they can unsubscribe from future messages (i.e. "Text STOP to unsubscribe").

You can also check out our [Acceptable Use Policy](#) which provides further guidance related to sending electronic messages.

### Purchasing Your Custom Texting Number

Before you can start sending text messages from IXACT Contact, you must first purchase your custom texting phone number. All text messages sent from IXACT Contact will come from your purchased custom number, not your own mobile number. Before purchasing your custom number, if you have not already done so, you will need to enter and verify your own mobile phone number.

Your custom texting phone number costs \$5.00 per month, which includes 100 texting credits each month at no additional charge. Upon purchasing your number, your credit card will immediately be charged \$5.00 (plus applicable taxes). You will then be automatically charged \$5.00 each subsequent month, unless you cancel the texting service. Additional texting credits can be purchased if required (see [Purchasing Texting Credits](#)).

To enter and verify your personal mobile number (if you have not already done so):

1. Enter your own mobile phone number.
2. Click **Send Verification Code**.

3. Your 4-digit verification will be sent to your mobile phone as a text message. Enter the code and click **Verify**.

**Note** If your personal mobile number changes, be sure to immediately update and verify your new phone number by clicking **Change Mobile Number**.

You can now purchase your custom texting phone number:

1. Click **Purchase Custom Number**.
2. Enter the area code you would like for your phone number and click **Search**.

**Note** There may not be any available phone numbers with your preferred area code. Try other valid area codes for your area until the search returns available phone numbers.

3. Select the number you want to purchase.
4. Read and agree to our [Acceptable Use Policy](#).
5. Click **Purchase**.

## Texting Individual Contacts

Once you [purchase your custom texting phone number](#), you can text any individual contact with at least one mobile number on their contact profile.

To text an individual contact:

1. Open the contact profile.
2. Click the Text Contact icon next to the mobile number you want to send a message to.
3. Enter your message in the area at the bottom of the popup.

**Note** A text segment is up to 160 characters and each segment requires 1 texting credit. As you type your text message, the indicator below tells you how many characters you have entered, and how many text segments are required. If your text message exceeds 160 characters, you will require more than 1 texting credit. If you do not have enough texting credits to send your message, you can click **Purchase Credits** to buy more (see [Purchasing Texting Credits](#)).

**Note** If you text a main contact mobile number, and the spouse/partner also has a mobile number, you can opt to send the message to both numbers by selecting the Text Partner/Spouse option. Note that this will double the number of texting credits required to send your message.

4. If you want to include a picture with your message, click the Attach Picture icon to the left of your message, and select the picture file from your computer.

**Note** The maximum picture file size is 2MB.

**Note** Messages that include a picture require 2 additional texting credits.

5. When you are ready to send your text, click **Send**.

The area above the message box displays your texting "conversation" with the contact much like you see on your mobile phone.

A record of each outbound text message is also recorded in your contact's Contact History. If you opt to text both the main contact and spouse/partner, separate entries will be recorded for each.

## Mass Texting

Once you [purchase your custom texting phone number](#), you can use List View to mass text a message to a selected group of contacts.

To send a mass text:

1. Go to contacts List View by clicking the **List** button above your contact list.
2. Search for and select the group of contacts to whom you want to send your text message (see [Selecting Contacts](#)).
3. Select **Create Mass Text** from the action list.
4. Enter your text message in the area provided.

**Note** You can personalize each contact's text message by selecting the desired merge field from the list below the message area.

**Note** A text segment is up to 160 characters and each segment requires 1 texting credit. As you type your text message, the indicator below the message area tells you how many characters you have entered, and how many segments are required. If your text message exceeds 160 characters, you will require more than 1 texting credit for each message sent. If you do not have enough texting credits to send your message, you can click **Purchase Credits** to buy more (see [Purchasing Texting Credits](#)).

**Note** By default the text message will only be sent to the main contact mobile number of each selected contact. If you wish to also send the message to the spouse/partner's mobile number (assuming the spouse/partner has a mobile number), you can opt to send the message to both numbers by selecting the Text Partner/Spouse option. Note that this will increase the number of required texting credits.

5. If you want to include a picture with your message, click the Attach Picture icon to the left of your message, and select the picture file from your computer.

**Note** The maximum picture file size is 2MB.

**Note** Messages that include a picture require 2 additional texting credits.

6. When you are ready to send the messages, click **Send**.

A record of each outbound text message is recorded in each contact's Contact History. If you opt to text both the main contact and spouse/partner, separate entries will be recorded for each.

## Incoming Messages

When a contact replies to a text message sent from your IXACT Contact custom number, you will be immediately notified via a text message to your mobile phone. The message will tell you who replied, the contents of the message, and the contact's mobile number. The inbound message will also be recorded in the contact's contact history.

Each incoming text message uses up 2 texting credits per segment.

*You cannot respond directly to the notification message sent to your mobile phone.* You can either respond from within IXACT Contact, or you can click the contact's mobile phone number in the notification message in order to call or text message them back from your own mobile number.

*Note that if you call or message them directly from your phone, this interaction will not be recorded in IXACT Contact. To have the whole conversation recorded in the contact's contact history, you need to reply to the contact's incoming messages from within IXACT Contact.*

## Recent Messages Indicator

After you have purchased your custom texting number and turned on the texting features in IXACT Contact, a **Recent Text Messages** icon will appear in the secondary menu in the top right corner of the screen. When somebody responds to one of your text messages sent from IXACT Contact, a red indicator will appear over the icon letting you know how many unread messages you have. Click the icon in order to quickly see any unread messages, as well as other recent inbound messages. For each message listed, you can click the contact name to see the whole conversation with the contact and quickly respond.

## Unsubscribes & Re-subscribes

Recipients of text messages that you send from IXACT Contact can unsubscribe at any time by replying STOP, STOPALL, UNSUBSCRIBE, CANCEL, END, or QUIT to any message. If a contact unsubscribes from your messages, you will receive a text notification alerting you to this, and it will be recorded in the contact's contact history.

*You cannot under any circumstances send a text message from IXACT Contact to a contact who has unsubscribed from your messages.* If you attempt to message the contact again, you will be notified that the message could not be delivered.

A contact who has unsubscribed to your text messages can re-subscribe at any time by replying START, YES, or UNSTOP to any message. If a contact re-subscribes to your messages, you will receive a text notification alerting you to this and it will be recorded in the contact's contact history.

Unsubscribes and re-subscribes both use up 2 texting credits.

## Calls to Your Custom Number

Your custom texting number cannot receive incoming calls. If a contact calls your custom number, you will receive a text message letting you know the name and mobile number of the contact who called, so you can immediately call or text them back. The contact will also receive a text message letting them know that calls to the number are not supported and that you will get back to them shortly.



**Note** Each incoming call to your custom texting number will use 2 texting credits.

### Purchasing Texting Credits

Your custom texting phone number comes with 100 texting credits each month.

The number of remaining texting credits is displayed in your User Profile, as well as the individual and mass texting popups.

You may purchase more texting credits at any time by clicking the **Purchase Credits** link next to your remaining credits count. In the pop-up window, click the **Purchase** button next to the number of credits you wish to purchase. The more you choose to purchase, the lower the cost per credit. Your purchased credits will never expire and can be used at any time. Your credit card will immediately be charged the cost of the credits (plus applicable taxes).

**Note** If you try to send a text message and you do not have enough available credits, the Purchase Credits popup will appear when you click **Send**. Upon purchasing enough credits, you will immediately be able to send out your message.

## Letters and Labels

### About Letters and Labels

Sending letters to your prospects and clients has never been easier. With Letters and Labels you just pick the appropriate margins for your own letterhead, write your message, and then select the recipients from your contact list. Personalized letters for each of your contacts are automatically created and ready to print on your letterhead.

To get you started, IXACT Contact comes loaded with hundreds of pre-written letter templates. You can either use the pre-loaded templates just as they are, modify them to your needs, or create your own templates from scratch. For more information, see [Using Letter Templates](#).

Create mailing labels or envelopes for newsletters and other communications just as easily - when you create a letter you can create labels or envelopes at the same time for the selected contacts, or you can create labels or envelopes separately.

### Best Practices for Communicating with Contacts

Before you create a mass email message or letter, be sure you have thought about your contacts - is this something they really want to know, or just something you want to tell them? Is this information best presented in email form, or would a more formal letter be more appropriate?

Choose your recipients carefully - sending everything to everybody can fatigue the relationship.

Be sure you have entered full mailing addresses for all contacts to whom you want to send letters, and email addresses for those you want to include in email communications.

#### For letters

- Compose your letter with your reader in mind. Keep your message short and to the point.
- Be sure to preview the letter before printing it.
- If your letter is likely to be sent again (for example, a yearly invitation to a golf tournament), consider saving it as a template. You can then re-use it again and again. For more information, see [Using Letter Templates](#).

#### For emails

- Compose your email with your reader in mind. Keep your message short and to the point.
- Develop an effective subject line, something that will grab your reader's attention and make them want to open the message.
- Send the email to yourself first to preview it. Be sure everything looks perfect before sending the message to your contacts.

- If your message is likely to be sent again (for example, a notice about an open house), consider saving it as a template. You can then re-use it again and again. For more information, see [Using Email Templates](#).

## Creating a Letter

To create a letter:

1. Click **Letters & Labels** in the main menu.  
The Your Letters & Labels screen appears, showing three tabs: a Select Letter Template tab that lists saved letter templates, a Create New Letter tab that lets you create letters and letter templates, and a Create Labels/Envelopes tab that lets you create labels and/or envelopes.
2. If you want to use an existing letter template, click the template name link. Templates are divided into predefined categories: Marketing, Listing, Closing, Activity Plans, Greeting Cards and Other. You can search your templates by selecting the category from the list at the top of the page, and/or by entering a keyword and clicking the magnifying glass icon. To create a new letter, simply click the **Create New Letter** tab.
3. Select the margin set that best fits your letterhead.  
**Note** To set your default letter margins to apply to all letters, see [Changing Your User Profile Settings](#). If none of the margin choices fit your letterhead, please contact us and we will try to accommodate your requirements.
4. Click **Select Contacts** to choose who you want to receive the letter (see [Selecting Contacts](#) or [List View](#)).  
**Note** If you only want to include contacts whose preferred method of correspondence is Letters, click the check box at the top of the search screen.
5. Define the header settings (date, address, and salutation):
  - Choose whether to **Include** or **Exclude** the date in the letter header.
  - Choose whether to **Include** or **Exclude** the address and email/letter salutations defined in each contact's profile.
  - Choose the font type and size of the letter header, which includes the date and contact addresses and salutations. This can be different from the font and size used for the body of the letter.
6. Enter the body of the letter using the formatting tools to change the way the content looks. The *wysiwyg* ("what you see is what you get") [content editor](#) provided for formatting the content has many of the same features as word processor software like Microsoft Word. If you're not sure what a tool does, hover over the buttons with your mouse and the name of the function will appear. Experiment to get the look you want.
7. Choose whether to Include or Exclude your signature at the bottom of the letter. (For instructions on how to set up your signature, see [Creating a Signature for Your Emails and Letters](#).)



*Use the From drop-down list to select which team member's signature you want to use for the letter.*

8. By default, an entry will be added to the Contact History tab of each contact that you send this letter to. A description of the letter is required below in order to record these entries. If you do not want to do this, select "No" for **Record in Contact History log for each selected contact**.
9. If you want to create labels or envelopes for each contact, select the **Print labels or envelopes** check box and select the appropriate label or envelope type from the list. If you are using a partially used label sheet, you can select the row and column to start printing at, so that you do not waste labels.

**Note** The envelope choices are optimized for number 10 envelopes and should work with most modern printers, whether left, right or center justified.

10. Click **Preview Letter** to see how the letter will look before printing it.
11. Make any changes necessary (and preview again if you want to). When you are satisfied with your letter:
  - If you want to save this letter to use again in the future, click **Save Letter as Template**. Everything is saved except the selected contacts. For more information, see [Using Letter Templates](#).



*The signature From team member selection is not saved with letter templates.*

- When you are ready to send the letter to the selected contacts, make sure you have sufficient letterhead in your printer and click **Print Mail Merged PDF Letter**. If **Print labels or envelopes** is selected, a new screen will open with buttons for separately printing the letters and the labels or envelopes.

## Creating Labels or Envelopes

You can create labels or envelopes when you create a letter (see [Creating a Letter](#)), or you can create labels or envelopes separately, as described below.

To create labels/envelopes separately from creating a letter:

1. Click **Letters & Labels** in the main menu.  
The Your Letters & Labels screen appears, showing three tabs: a Select Letter Template tab that lists saved letter templates, a Create New Letter tab that lets you create letters and letter templates, and a Create Labels/Envelopes tab that lets you create labels or envelopes.
2. Click **Create Labels/Envelopes**.
3. On the Create Labels/Envelopes tab, select the appropriate label or envelope format. If you are using a partially used label sheet, you can select the row and column to start printing at, so that you do not waste labels.

**Note** The envelope choices are optimized for number 10 envelopes and should work with most modern printers, whether left, right or center justified.

**Note** When printing envelopes you have the option to print your return address in the top left corner of each envelope.

4. Click **Select Contacts** to choose the contacts you want to create labels for (see [Selecting Contacts](#) or [List View](#)).

**Note** If you only want to include contacts whose preferred method of correspondence is Letters, click the check box at the top of the search screen.

5. Make sure you have the sufficient label sheets in your printer and click **Print Mail Merged Labels**.

**Note** If your jurisdiction requires you to include 'Or Current Resident' below the name on each label or envelope, be sure to select the check box below **Select Contacts** before printing.

## Using Letter Templates

### Creating a letter template

To create a letter template:

1. Create a letter as described in [Creating a Letter](#).

**Note** If you are also going to print this letter now, select the contacts to send it to. If you are only creating a template for future use, you do not need to select the contacts. Each time you create a letter based on a template you must select the contacts at that time.

2. When the letter is complete, preview it to confirm that it looks just right, and then click **Save Letter as Template**.
3. You are prompted to enter a name and select from one of the predefined categories (Marketing, Listing, Closing, Activity Plans, Greeting cards and Other) for the template. In order to more easily identify what the template contains when you are viewing the list of templates, you should also enter a description.
4. Click **Save**. Everything is saved except the selected contacts.



*All team members share the same set of letter templates.  
The signature From team member selection is not saved with letter templates.*

5. The letter remains open. If you want to print this letter now for the selected contacts, click **Print Mail Merged PDF Letter**. Otherwise, click **Cancel**.

Your new template is listed in the Select Letter Template tab list.

## Updating or copying a template

To update a template, or copy an existing template:

1. In the Letters & Labels tab, click the name link of the template you want to update or copy.
2. Make the changes as required, and then click **Save Letter as Template**.
3. To update the template, click **Save** without changing the name.  
To create a new template, change the name, category and description where required, then click **Save**.

## Creating a letter based on a template

To create a letter based on a template:

1. In the Select Letter Template tab, click the name link of the template you want to use. Templates are divided into predefined categories: Marketing, Listing, Closing, Activity Plans, Greeting Cards and Other. You can search your templates by selecting the category from the list at the top of the page, and/or by entering a keyword and clicking the magnifying glass icon.
2. The letter opens in the Create New Letter tab.
3. Select the contacts to send the letter to.
4. Make any other changes as required. Note that this does not affect the template, which is just a starting point.



*Use the From drop-down list to select which team member's signature you want to use for the letter.*

5. If you want to update or copy the template, click **Save Letter as Template**.  
To update the template, click **Save** without changing the name. To create a new template, change the name, category and description as required, then click **Save**.
6. Complete as described in [Creating a Letter](#).

## Activity Plans

### About Activity Plans

Use Activity Plans to schedule each step of your important contact relationships, as well as the activities related to each of your Active Business listings.

IXACT Contact comes loaded with dozens of predefined plans for marketing to your contacts and managing both your listing and closing activities.

Upon assigning an Activity Plan to a contact or listing, IXACT Contact automatically creates a series of tasks with reminders that will tell you when to call a new contact, send a prospecting email, or put up a sign for a new listing.

Each task is automatically assigned a due date based on when the plan is assigned, or based on important dates such as a listing expiry date or closing date.

Setup drip email campaigns by setting your email tasks to auto-send, so that your emails are automatically sent out on the task due date.

### Creating a Marketing Activity Plan

Marketing Activity Plans are plans that can be assigned to contacts.

To create a Marketing Activity Plan:

1. Click **Activity Plans** in the main menu.  
The Activity Plan list screen appears, listing the pre-loaded plans as well as any plans you have created yourself.
2. In the Marketing Plans section of the list, click **New Marketing Plan**. The Add Marketing Activity Plan screen appears.
3. Enter the name and description of the plan.
4. If applicable, select the method of correspondence for the plan. You can indicate whether the plan is to include a series of letters, emails or both (Mixed).

**Note** The setting of the method of correspondence will help you assign the appropriate plan to a contact based on the contact's preferred method of correspondence.

5. To add a task to the plan, click **Add Task**.
6. Enter the task description, activity type, the days after the plan start date that the task will be due, and whether you would like a reminder for the task.

**Note** To help you calculate the due days, click **Use calendar to calculate number of days from today**.



*The Assign To selection provides for the assignment of each task to a member of your team. Each task can either be assigned to a specific team member, or it can be assigned to the team member who assigns the plan to a contact.*

7. If the activity type is Email, indicate whether or not you want the email to auto-send on the task due date.
8. If you do not want the task to be due on a Saturday or Sunday, indicate whether you would like the task to be automatically moved to the previous or next business day.
9. Enter any notes for the task.
10. If the activity type selected in Step 6 is either Letter or Email, select the template at the bottom of the screen. You can search for a template by category (which defaults to Activity Plans) and/or keyword. Upon selecting a template in the list, click **Preview Content** to view the contents of the template and confirm that you have made the right selection.

**Note** You can preview or edit email and/or letter templates selected for activity plans from the plan task list by clicking the Preview/Edit link for each task in the list.



*The From option provides for the selection of the team member branding to be used for each email or letter task. Each email or letter can use the branding of a specific team member, or it can use the branding of the team member who assigns the plan to a contact.*

11. Click **Save**.
12. Repeat steps 5 through 11 until you have created all the tasks for your Activity Plan.
13. Click **Save** in the Add Marketing Activity Plan screen.

## Assigning an Activity Plan to a Contact

To assign a Marketing Activity Plan to a contact:

1. From the contact's Keep In Touch tab, click **Assign New Activity Plan**.
2. Enter the plan start / event date (defaults to the current date).
3. To search for the desired plan, select the method of correspondence from the list and/or enter a keyword, and click the magnifying glass icon to limit the list of plans to select from.
4. Click the check box next to the plan you wish to select and click **Continue**.
5. The next screen displays a list of the plan tasks and the due date automatically assigned to each task. If necessary, prior to assigning the plan, you can modify the automatically assigned date for each task, or remove the check in the Include column to exclude the task altogether.

**Note** At this point nothing has actually been assigned or created. If for some reason you do not wish to assign the plan, click **Cancel**. If you wish to assign a different plan or change the plan start date, click the Back button and return to step 2.





*Each task includes an Assign Task To drop-down list for the selection of the team member to which each task is to be assigned. For email and letter tasks, an additional Send From drop-down list provides for the selection of which team member's branding to use for the email or letter. The default assignments are based on the set up of the activity plan (See [Creating a Marketing Activity Plan](#)). There are also drop-down lists and Update buttons at the top of the page that allow you to easily update the Assign Task To and/or Send From team member selections for all activity plan tasks.*

#### 6. Click **Assign Plan and Create Selected Tasks**.

For information on viewing and completing activity plan tasks assigned to a contact, see Viewing a Contact's Activities & History.



You can use [List View](#) to easily assign a Marketing Activity Plan to multiple contacts at the same time.

### Creating a Listing Activity Plan

Listing Activity Plans are plans that can be assigned to Active Business listings.

To create a Listing Activity Plan:

1. Click **Activity Plans** in the main menu.  
The Activity Plan list screen appears, listing the pre-loaded plans as well as any plans you have created yourself.
2. In the Listing Plans section of the list, click **New Listing Plan**. The Add Listing Activity Plan screen appears.
3. Enter the name and description of the plan.
4. To add a task to the plan, click **Add Task**.
5. Enter the task description and activity type.
6. If the activity type is Email, indicate whether or not you want the email to auto-send on the task due date.
7. Select the key listing date on which the task due date should be calculated, and enter the days before or after this date that the task will be due. Indicate whether you would like a reminder for the task.

**Note** To help you calculate the due days, click **Use calendar to calculate number of days from today**.



*The Assign To selection provides for the assignment of each task to a member of your team. Each task can either be assigned to a specific team member, the team member who assigns the plan to a listing, or the listing agent assigned to the listing.*

8. If you do not want the task to be due on a Saturday or Sunday, indicate whether you would like the task to be automatically moved to the previous or next business day.

9. Indicate whether you would like the task description to be automatically added to the listing service report upon completing the task.
10. Enter any notes for the task.
11. If the activity type selected in Step 6 is either Letter or Email, select the template at the bottom of the screen. You can search for a template by category (which defaults to Activity Plans) and/or keyword. Upon selecting a template in the list, click **Preview Content** to view the contents of the template and confirm that you have made the right selection.

**Note** You can preview or edit email and/or letter templates selected for activity plans from the plan task list by clicking the **Preview/Edit** link for each task in the list.



*The From option provides for the selection of the team member branding to be used for each email or letter task. Each email or letter can use the branding of a specific team member, or it can use the branding of the team member who assigns the plan to a listing.*

12. Click **Save**.
13. Repeat steps 4 through 12 until you have created all the tasks for your Activity Plan.
14. Click **Save** in the Add Listing Activity Plan screen.

## Creating a Closing Activity Plan

Closing Activity Plans are plans that can be assigned to Active Business listings.

To create a Closing Activity Plan:

1. Click **Activity Plans** in the main menu.  
The Activity Plan list screen appears, listing the pre-loaded plans as well as any plans you have created yourself.
2. In the Closing Plans section of the list, click **New Closing Plan**. The Add Closing Activity Plan screen appears.
3. Enter the name and description of the plan.
4. To add a task to the plan, click **Add Task**.
5. Enter the task description and activity type.
6. If the activity type is Email, indicate whether or not you want the email to auto-send on the task due date.
7. Select the key listing date on which the task due date should be calculated, and enter the days before or after this date that the task will be due. Indicate whether you would like a reminder for the task.

**Note** To help you calculate the due days, click **Use calendar to calculate number of days from today**.



*The Assign To selection provides for the assignment of each task to a member of your team. Each task can either be assigned to a specific team member, the team member who assigns the plan to a listing, the seller closing agent assigned to the listing, or the buyer closing agent assigned to the listing.*

8. If you do not want the task to be due on a Saturday or Sunday, indicate whether you would like the task to be automatically moved to the previous or next business day.
9. Indicate whether you would like the task description to be automatically added to the listing service report upon completing the task.
10. Enter any notes for the task.
11. If the activity type selected in Step 6 is either Letter or Email, select the template at the bottom of the screen. You can search for a template by category (which defaults to Activity Plans) and/or keyword. Upon selecting a template in the list, click **Preview Content** to view the contents of the template and confirm that you have made the right selection.

**Note** You can preview or edit email and/or letter templates selected for activity plans from the plan task list by clicking the **Preview/Edit** link for each task in the list.



*The From option provides for the selection of the team member branding to be used for each email or letter task. Each email or letter can use the branding of a specific team member, or it can use the branding of the team member who assigns the plan to a listing.*

12. Click **Save**.
13. Repeat steps 4 through 12 until you have created all the tasks for your Activity Plan.
14. Click **Save** in the Add Closing Activity Plan screen.

## Assigning an Activity Plan to a Listing

To assign a Listing or Closing Activity Plan to an Active Business listing:

1. From the listing's Activity Plans tab, click **Assign New Activity Plan**.
2. Enter the plan start / event date (defaults to the current date).
3. Select whether to assign a Listing or Closing plan.
4. To search for the desired plan, select the method of correspondence from the list and/or enter a keyword in the plan name and click the magnifying glass icon to limit the list of plans to select from.
5. Click the check box next to the plan you wish to select and click **Continue**.
6. The next screen displays a list of the plan tasks and the due date automatically assigned to each task. If necessary, prior to assigning the plan,

you can modify the automatically assigned date for each task, or remove the check in the Include column to exclude the task altogether.

**Note** If the Include box is unchecked and the due date is not automatically assigned for a given task, this means that the date on which task is based has not been entered for the listing. If you still wish to create the task, simply select the desired due date and check the Include box.

**Note** At this point nothing has actually been assigned or created. If for some reason you do not wish to assign the plan, click **Cancel**. If you wish to assign a different plan or change the plan start date, click **Back** and return to step 2.



*Each task includes an Assign Task To drop-down list for the selection of the team member to which each task is to be assigned. For email and letter tasks, an additional Send From drop-down list provides for the selection of the team member's branding to use for the email or letter. The default assignments are based on the set up of the activity plan. The top of the page includes drop-down lists and Update buttons to allow you to easily update the Assign Task To and/or Send From team member selections for all activity plan tasks.*

7. If you are representing both the Seller and Buyer, indicate which party the tasks are to be assigned to.

8. Click **Assign Plan and Create Selected Tasks**.

For information on viewing and completing activity plan tasks assigned to a listing, see [Viewing the Activities for a Listing](#).

## Unassigning an Activity Plan

To unassign an activity plan, click **Unassign plan and delete incomplete tasks** next to the plan in the activity plan list of the contact or listing. The plan is unassigned and incomplete tasks are deleted. Completed tasks created from the plan are not deleted and remain in the activity history.

## Keep In Touch

### About Keep In Touch Events

Make sure you never miss an opportunity to connect with prospects and clients. There are several types of Keep In Touch events:

- Birthday event - This event can be applied to any contact for which you enter a birth date. See [Defining the Birthday Event](#).
- Move In Anniversary event - This event can be applied to any contact for which you have recorded a move in date for the home address. See [Defining the Move In Anniversary Event](#).
- \*Keep in Touch Call event - This event lets you set up regular communications with individual contacts. See [Defining Keep in Touch Call Events](#).
- "Global" events - e.g. monthly e-newsletters, seminars, BBQs, Golf Day, etc. - these are available to all contacts, but you need to select the contacts. See [Creating a Global Keep in Touch Event](#).
- Contact-specific events - these are regular events that only apply to one contact, like a closing anniversary, annual fishing trip, etc. See [Creating a Contact-Specific Keep In Touch Event](#).

\* Requires Keep in Touch Calls functionality to be enabled in the User Profile Keep in Touch tab (see [Setting Up Your Keep in Touch Options](#)).

For each event, you can have IXACT Contact automatically create calendar entries, reminders, and tasks, effectively creating a schedule that automatically prompts you when letters, emails and other things need to be sent.

An event date can be added to your calendar or task list, and multiple tasks can also be defined for the event. For example, a golf event could have tasks for booking the course, booking the caterer, sending out the invitations, buying the prizes, etc. Each of these tasks would be assigned a different due date based on a preset number of days prior to the event.

### Defining the Birthday Event

The birthday event can be applied to any main contact or spouse/partner with a birth date. The birthday options for each contact default to the global birthday event but can be changed for individual contacts in the Keep In Touch tab of the contact record (see [Viewing a Contact's Keep In Touch Events & Activity Plans](#)).

You can set up whether and when to create calendar entries, reminders, and tasks for the global birthday event. You can also auto-send a selected Happy Birthday e-Card on the day of each contact's birthday.

To define the global birthday event:

1. Click **Keep In Touch** in the main menu.
2. Click the **Birthday** link in the list titled Configure Keep In Touch Events. The birthday event settings appear.

3. Indicate whether you want to include birthdays in your calendar and the number of days prior to the birthday that you would like a reminder.



*Use the Assign To drop-down list to select the default team member calendar in which birthday appointments will be created.*

4. Indicate whether you want to create a task to buy a card and/or gift and the number of days prior to the birthday that this task will be due. You can also receive a reminder for this task and set the date and time of the reminder.



*Use the Assign To drop-down list to select the default team member task list in which the birthday tasks will be created.*

5. Indicate whether you want to automatically send a Happy Birthday e-Card on each contact's birth date. After checking the box, use the fields below to search for, preview and select the email template you want to use.



*Use the From drop-down list to select the team member branding to use for the email. The branding includes the email header, signature and the From email address.*

6. Click **Save**.

**Note** You can set a preference in the global Birthday event so that the event is automatically activated for contacts with a birth date. This applies to both the main contact birthday and the spouse/partner birthday.

If you want to activate the birthday event for existing contacts with a birth date, also select the check box that appears below. This is very useful if you are a new user who has imported an existing contact list that includes birthdays.



*This option is only available to the Team Leader.*

## Defining the Move In Anniversary Event

The move in anniversary event can be applied to any contact with a move in date entered for the home address in the contact profile. The event options for each contact default to the global move in anniversary event but can be changed for individual contacts in the Keep In Touch tab of the contact record (see Viewing a Contact's Keep In Touch Events & Activity Plans).

You can set up whether and when to create calendar entries, reminders, and tasks for the global move in anniversary event.

To define the global move in anniversary event:

1. Click **Keep In Touch** in the main menu.
2. Click the **Move in Anniversary** link in the list titled Configure Keep In Touch Events. The move in anniversary event settings appear.

3. Indicate whether you want to include move in anniversaries in your calendar and the number of days prior to the anniversary that you would like a reminder.



*Use the Assign To drop-down list to select the default team member calendar in which appointments will be created.*

4. Indicate whether you want to create a task to buy a card and/or gift and the number of days prior to the anniversary that this task will be due. You can also receive a reminder for this task and set the date and time of the reminder.



*Use the Assign To drop-down list to select the default team member task list in which the tasks will be created.*

5. Indicate whether you want to automatically send a Move In Anniversary e-Card on each contact's move in anniversary date. After checking the box, use the fields below to search for, preview and select the email template you want to use.



*Use the From drop-down list to select the team member branding to use for the email. The branding includes the email header, signature and the From email address.*

6. Click **Save**.

**Note** You can set a preference in the global move in anniversary event so that the event is automatically activated for contacts with a move in date for the home address.

If you want to activate the move in anniversary event for existing contacts with a move in date for the home address, also select the check box that appears below.



*This option is only available to the Team Leader.*

## Defining Keep in Touch Call Events

Keep In Touch call events allow you to easily set up regular communications with your contacts. IXACT Contact comes pre-loaded with annual, semi-annual, quarterly, monthly, and bi-weekly Keep In Touch call events.

**Note** Using Keep in Touch Calls requires the functionality to be enabled in the User Profile Keep in Touch tab.

When [Setting Up Your Keep in Touch Options](#), you also have the option to use the [Keep in Touch Coach](#), which is a Dashboard widget that automatically tells you which contacts to reach out to next based on each contact's Status, and the Keep in Touch frequency set for each Status.

While you can use both features at the same time, we highly recommend using only one in order to establish a consistent “Keep in Touch” strategy.

You can set up whether and when to create calendar entries, reminders, and tasks for each global event.

To define a global Keep In Touch call event:

1. Click **Keep In Touch** in the main menu.
2. Click the name of the event in the list title Configure Keep In Touch Calls. The event settings appear.
3. Indicate whether you want to include the event in your calendar and the number of days prior to the event that you would like a reminder.



*Use the Assign To drop-down list to select the default team member calendar in which appointments will be created.*

4. Indicate whether you want to create a task for the event and the number of days prior to the event date that this task will be due. You can also receive a reminder for this task and set the date and time of the reminder.



*Use the Assign To drop-down list to select the default team member task list in which the tasks will be created.*

5. Click **Save**.

## Setting Up the Monthly e-Newsletter Event

IXACT Contact includes a professionally written and designed Monthly e-Newsletter that you can schedule to be automatically sent to your contacts each month using a global keep in touch event.

**Note** For information about viewing or editing the current issue of your monthly e-Newsletter, see [Customizing the Current Monthly e-Newsletter Issue](#).

To set up your Monthly e-Newsletter global keep in touch event:

1. Click **Keep In Touch** in the main menu.
2. Click the **Monthly e-Newsletter** link in the list titled Configure Keep In Touch Events or click the **Configure** button. The Monthly e-Newsletter settings screen opens.
3. Check the boxes next to the months that you wish to auto-send the e-Newsletter.
4. Select the day of the month that you wish to auto-send each e-Newsletter. You can either select a specific day each month between the 1st and the 25th, or select the first, second or third selected weekday of each month.
5. Indicate whether you want to have a calendar appointment automatically created for the auto-send date for each selected month, and the number of days prior to the date that you would like a reminder.





*Use the drop-down list to select the team member calendar in which the reminder appointment is to be created.*

6. Select the time at which you wish to auto-send each e-Newsletter. You can select a time between 4:00AM and 11:00PM.

**Note** Although you can select the time at which you wish to send your e-Newsletter, all e-Newsletter issues are submitted to the sending queue at 2:00AM Eastern time on your auto-send day. **Any changes to your e-Newsletter content (i.e. subject, personal message, email header or signature) or the contacts assigned to receive it, must be made prior to 2:00AM Eastern time on your auto-send day.**

7. Set the default email subject. If desired, this can be overridden for each issue.
8. Use the color picker drop-down to select the heading color for your e-Newsletter design. (This does not apply if you have selected the Modern standard email header for your e-newsletter.)
9. Indicate whether you would like to include your email header in the personalized area of the e-Newsletter and, if so, select the email header type you'd like to use.

**Note** If you want to send Monthly e-Newsletter emails that are mobile-friendly, meaning they can be easily read on all devices including smartphones, select the Standard email header option. See [Setting Up Your Email Header](#) for instructions on setting up your Standard email header. You can still set up a Custom email header that you can use for your other emails.



*Use the From drop-down list to select the team member's branding to use for the e-newsletter. The branding includes the email header and signature, as well as the sender email address.*

10. Indicate whether you would like to include your signature in the personalized area of the e-Newsletter. See [Creating a Signature for Your Emails and Letters](#) for instructions on setting up your signature.
11. Choose whether you would like to include social media share buttons in your e-Newsletters.

**Note** Social media share buttons allow the recipients of your e-Newsletters to share them via various social channels, allowing you to increase their reach.

12. Select your options for automatically adding new contacts to your e-Newsletter. There are separate options for manually entered contacts, new contacts added via lead capture, new contacts synchronized from your mobile phone or Google, and imported contacts.

**Note** The third option is only available if you have signed up for our wireless synchronization service (see [Wireless Synchronization](#)).

13. **IXACT Contact provides you with up to 2,500 free emails each month.** If you think you may not have enough mass emails available to send your e-Newsletter in any given month, click the **click here** link to see your options. You may choose to not send your emails and receive an email notification which will prompt you to purchase the required emails and re-schedule the auto-send day; or you can have the system automatically purchase enough emails to send your e-Newsletter. If you choose to automatically purchase emails, you can select a minimum number of emails to purchase in order to take advantage of a lower cost per email. The email pricing schedule is displayed on the page. Remember that your purchased emails will never expire, and can be used to send any mass email.
14. Click the **Choose contacts who are participating in the event** link to select the contacts who are to receive your e-Newsletter.

**Note** After the event has been activated, individual contacts can also be included or excluded in the Keep In Touch tab of the contact record (see Viewing a Contact's Keep In Touch Events & Activity Plans). The assigned contacts displayed in the global Keep In Touch event screen always reflect the individual contact assignments.

15. Click **Save**.

## Creating a Global Keep In Touch Event

Global events are events that are available to all contacts.

To create a global Keep In Touch event:

1. Click **Keep in Touch** in the main menu.
2. Click **Create New Event**. The Add a Keep In Touch Event screen appears.
3. Enter a name and description for the event.
4. Select the event date.
5. Select the **All Day Event** check box, if appropriate, otherwise enter the start and end time of the event.
6. Indicate if this event should be included in your calendar and task list. If you include the event in your task list, indicate whether you want a reminder and when.



*Use the Assign To drop-down lists for the calendar appointment and the task to select the team member(s) to which the appointment and task are to be assigned.*

7. If this will be a recurring event, select the **Recurring** check box and enter the recurrence pattern for the event. If you want the recurrence to end on a specific date, select the event end date in the field to the right of the event date.
8. If there are individual tasks that must be completed as part of this event, click **Add Event Task**. Enter the name of the task, the number of days prior

to the event date it is due, and if a reminder is required. Click **Save**. Add as many event tasks as required.

**Note** Event tasks can only be entered for non-recurring events, or events that recur on a yearly basis.



*Use the Assign To drop-down list to select the team member to which each task is to be assigned.*

9. To select contacts who you want to include in this event, click **Choose contacts who are participating in this event**.

**Note** After an event has been created, individual contacts can also be included or excluded in the Keep In Touch tab of the contact record (see Viewing a Contact's Keep In Touch Events & Activity Plans). The assigned contacts displayed in the global Keep In Touch event screen always reflect the individual contact assignments. Contacts can be included or excluded either from the event screen or from the contact-specific Keep In Touch tab.

10. Click **Save**.

## Viewing a Contact's Keep In Touch Events & Activity Plans

The Keep In Touch tab in the [contact record](#) lists all global events (whether this contact is assigned to them or not), the contact's birthday events, move in anniversary event, \*Keep In Touch call events, any contact-specific events, and any activity plans assigned to the contact.

\* Requires Keep in Touch Calls functionality to be enabled in the User Profile Keep in Touch tab (see [Setting Up Your Keep in Touch Options](#)).

**Note** The contact-specific Keep In Touch tab is used to manage contact-specific events and plans, as well as the contact's assignments to global Keep In Touch events. The Keep In Touch button in the main menu is used to create and manage global Keep In Touch events (as well as the default settings for the birthday events, the move in anniversary event, and Keep In Touch call events). The Activity Plans button in the main menu is used to create and manage Activity Plans.

- To view details of a Keep In Touch event (global or contact-specific), click its name link.
- Select or clear the **Include Contact in Event** check box to cause the contact to be included in (or excluded from) a global Keep In Touch event. (This is linked to the contact selection in the Keep In Touch event details: changes in one location are reflected in the other.)
- Once a birth date is entered for a main contact or a spouse/partner, the corresponding birthday event can then be activated for the contact by either opening and saving the birthday event or by clicking **Activate**. The event options default to the global birthday event but can be changed for the contact by opening, modifying and saving a contact-specific birthday event.

**Note** If you wish, you can set a preference in the global Birthday event so it is automatically activated for contacts with a birth date. This applies to both the main contact birthday and the spouse/partner birthday.

- Once a move in date is entered for the home address on a contact's profile, the move-in anniversary event can be activated for the contact by either opening and saving the event or by clicking **Activate**. The event options default to the global move-in anniversary event but can be changed for the contact by opening, modifying and saving a contact-specific event.

**Note** If you wish, you can set a preference in the global move in anniversary event so that the event is automatically activated for contacts with a move in date.

- Any Keep In Touch call event can be activated for the contact by clicking the **Activate** button in the list. Enter the date you want for the first call, and click the **Activate** button. Using the **Activate** button in the list will use the global Keep In Touch call event options. If you want to override the global event options for the contact, open the contact-specific event by clicking on the event name, make the desired changes to the event, and click **Activate**.

**Note** Requires Keep in Touch Calls functionality to be enabled in the User Profile Keep in Touch tab (see [Setting Up Your Keep in Touch Options](#)).

- To create an event that only applies to this contact, click **Create New KIT Event** above the list titled "Keep in touch events specific to this contact". See [Creating a Contact-Specific Keep In Touch Event](#) for information about creating a contact-specific event.
- To assign an activity plan to a contact, click **Assign New Activity Plan**. For more information, see [Assigning an Activity Plan to a Contact](#). If you want to unassign an activity plan, click the **Unassign plan and delete incomplete tasks** button next to the plan in the list. The plan is unassigned and incomplete tasks are deleted. Completed tasks created from the plan are not deleted and remain in the contact's activity history.

## Creating a Contact-Specific Keep In Touch Event

To create a contact-specific Keep In Touch event:

1. In the contact's Keep In Touch tab, click **Create New Event**.
2. Enter a name and description for the event.
3. Select the event date.
4. Select the **All Day Event** check box, if appropriate, otherwise enter the start and end time of the event.
5. Indicate if this event should be included in your calendar and task list. If you include the event in your task list, indicate whether you want a reminder and when.



*Use the Assign To drop-down lists for the calendar appointment and the task to select the team member(s) to which the appointment and task are to be assigned.*

6. If this will be a recurring event, select the **Recurring** check box and enter the recurrence pattern for the event. If you want the recurrence to end on a specific date, select the event end date in the field to the right of the event date.
7. If there are individual tasks that must be completed as part of this event, click **Add Event Task**. Enter the name of the task, the number of days prior to the event date it is due, and if a reminder is required. Click **Save**. Add as many event tasks as required.

**Note** Event tasks can only be entered for non-recurring events, or events that recur on a yearly basis.



*Use the Assign To drop-down list to select the team member to which each task is to be assigned.*

## Managing Your Global Events

Click **Keep In Touch** in the main menu.

The Global Keep In Touch Events screen appears, listing the birthday event, the move in anniversary event, the Keep In Touch call events, and any global events that you have created.

### Changing the birthday event

Click the **Birthday** link. See [Defining the Birthday Event](#).

### Changing the move-in anniversary event

Click the **Move-in Anniversary** link. See [Defining the Move-In Anniversary Event](#).

### Changing a \*Keep In Touch Call event

\* Requires Keep in Touch Calls functionality to be enabled in the User Profile Keep in Touch tab (see Setting Up Your Keep in Touch Options).

Click the event name in the global event list. See [Defining Keep in Touch Call Events](#).

### Editing an event

Click the event's name link. See [Creating a Global Keep In Touch Event](#) for information about the event fields. If you make changes to an event, you are prompted to delete and recreate the calendar or task entries that may have already been automatically created for the event. *If you answer "Yes", any changes that were made to the appointment or tasks directly in the calendar or task list will be wiped out.*

## **Sending a letter or email message about the event to the selected contacts**

The **Create Letter/Labels** and **Create Email** icons are only available for global events (other than the birthday and move in anniversary events) to which at least one contact has been assigned. (In addition, the **Create Email** link is only available if at least one of the contacts assigned to the event has at least one email address entered and set to receive mass emails.)

Click **Create Letter/Labels** or **Create Email**. For more information, see [Creating a Letter](#) or [Creating a Mass Email Message](#).

For letters and labels, all contacts assigned to the event are preselected for the mail merge. If you wish, you can click the **Modify Selection** link to change these selections.

For a mass email, all contacts assigned to the event that have at least one email address entered, and are set to receive mass email, are preselected for the mass email. If you wish, you can click the **Modify Selection** link to change these selections.

## **If you no longer need an event**

Click **Delete** (to remove it permanently) or **Deactivate** (to keep it available for future use but remove any calendar or task entries). Note that even if you choose to delete an event, it is stored in the [Recycle Bin](#) so you can later restore it if needed. An event is deactivated when it is deleted, so an event that is restored from the recycle bin must be reactivated.

## **Keep in Touch Coach**

The “Keep in Touch Coach” is a Dashboard widget that will automatically tell you which contacts to reach out to next based on each contact’s Status, and the Keep in Touch frequency set for each Status.

To turn on and configure the Keep in Touch Coach, see [Setting Up Your Keep in Touch Options](#).

Once your Keep in Touch Coach is turned on, the widget will appear at the top of your Dashboard.

When it’s time to reach out to a contact, the Coach will present a ‘contact card’ that includes all of the contact’s most important relationship information right at your fingertips:

- Contact name and spouse name (clickable to go to the Contact Profile)
- Main contact picture (from the contact’s Social Intelligence tab)
- Phone numbers and primary email address
- Status
- Prospect Type
- Assigned Groups
- Last Prospecting Activity
- Last Note

You can filter by a selected Status if you want to prioritize contacts only in that Status.

You can 'action' each contact by:

- Entering a Prospecting Activity
- Updating the contact's Status
- Entering a Quick Task
- Selecting an entry from the "Snooze" list in order to have the contact re-appear in the selected number of days

The Coach automatically resets a contact's Keep in Touch frequency each time you enter a Prospecting Activity.

**Note** The Keep in Touch Coach feature has also been added to our Mobile app, so you can reach out to the right contacts at the right time from anywhere.

## Business Directory

### Using the Business Directory

When clients know they can call you for help, they become more loyal. The Business Directory is your list of professionals and companies: contractors, designers, cleaners, florists, math tutors, furniture stores, appliance installers that you can recommend when asked. In addition, these businesses will be more inclined to return the favor and recommend you to their clients.

Each entry in the Business Directory must first be added as a contact, and then you must define which of the contact's information should appear in the Directory. For more information, see [Adding a Contact](#) and [Adding a Contact to the Business Directory](#).

### Searching the Business Directory

To search the business directory:

1. Click **Business Directory** in the main menu.
2. In the Search screen, enter any combination of keyword (searches Business Type, Company Name, Description of Company Services, Notes, and Special Promotion fields), Business Type, and/or City, and then click **Search**.
3. All matches are listed. If the listing includes a website, you can click the link to go directly to the website. Alternatively, click the **Contact Name** link to open the contact's Business Directory tab.

**Note** After searching your business directory, you can click **Print Directory** to print the Business Directory report with only your matches.

### Adding a Contact to the Business Directory

If a contact provides a service that might be of interest to your other contacts, add the contact to your Business Directory.

**Note** The contact-specific Business Directory tab is used to include individual contacts in your business directory and enter additional business directory information. The Business Directory button in the main menu is used to search and return a list of all contacts that are included in your business directory.

To add an existing contact to your Business Directory:

1. Open the contact record, and then click the Business Directory tab (*not* the Business Directory button in the main menu).

The information from the Work Details section of the Contact Profile tab is shown on the Business Directory tab.

**Tip** Remember to assign a **Business Type** in the **Work Details** section of the Contact Profile tab.

2. Select the **Include in Business Directory** check box at the top of the tab.



**Tip** You can also select the **Include in Business Directory** check box in the **Work Details** section of the Contact Profile tab.

3. Optionally, enter an alternate contact, a description of the company services, notes, or any special promotions.
4. Click **Save**.

For information about searching or printing the Business Directory, see [Using the Business Directory](#).

## Goal Setting

### About Goal Setting

Setting goals and tracking your performance against those goals is key to building a successful real estate business.

IXACT Contact allows you to set financial and activity-based goals each year, and provides real-time visibility to how you are performing to your goals.

To track your financial performance, use the Active Business area to enter and track all of your listings, sales and commissions earned, as well as additional key statistics like average list price, average days on market and average sale to list price (see [About Active Business](#)). Be sure to add the Closed Business widget to your Dashboard in order to see a real-time snapshot of your financial performance and how you are performing against your goals for the year (see [Customizing Your Dashboard](#)).

To track your prospective activities against your goals, be sure to record all prospecting activities for your contacts (see [Recording Prospecting Activities for a Contact](#)). Be sure to add the Prospecting Activities widget to your Dashboard in order to see a summary of your prospecting activities of the year and how you are performing to your goals (see [Customizing Your Dashboard](#)).

### Entering Your Goals

To set up your goals for a given year, click **Goal Setting** in the main menu, select the year from the list at the top of page, and click the **Get Started** button.

You will be asked a series of questions that will be used to calculate the number of transactions you need to do in order to reach your annual gross commission income (GCI) goal, as well as the number of prospecting activities you need to do to get there.

**Note** If you are starting to enter transactions in the Active Business area after the calendar year has started, for Question 1 select the date on which you intend to start entering transactions, and enter the GCI that you want to earn for the remainder of the year.

All of your prospecting activity goals are entered as annual goals. For Question 7 enter the number of weeks that you intend to work during the year, and your weekly activity goals will be calculated accordingly. (Don't forget to subtract your vacation weeks!)

**Note** If you are setting up your goals after the calendar year has started, select the date on which you will start entering your contact prospecting activities, and enter the number of weeks you intend to work for the balance the year. Your activity goals should reflect your goals for the balance of the year.

**Note** If you create your own 'custom' Prospecting Activity Types (see [Recording Prospecting Activities for a Contact](#)), your Goal Setting setup will ask you how many of each of your custom types you would like to do for the year.



*Only the Team Leader and administrators can enter goals for a team. There is one set of financial goals for the team, but prospecting activity goals are entered for each team member.*

Once you have answered all of the questions, you will be presented with a summary page that includes the business activities you need to conduct in order to reach your financial goals for the year, as well as the prospecting activities you need to do to get there. You can modify your goals at any time clicking the **Edit Goals** button at the top of the page.



If you have started entering your goals and you need to do something else, don't worry, all questions you answer are saved 'on-the-fly'. When you come back to Goal Setting, select the year for which you have partially entered your goals, and click the **Continue** button. You are returned to Question 1 in case you need to override your answers, but all of your previous answers have been saved.

## Reports

### About Reports

IXACT Contact comes with a range of valuable pre-designed reports that help you make better decisions about your marketing and business development.

### Generating a report

To generate a report, click **Reports** in the main menu.

The following reports are available. When you select one, you must define criteria, e.g. select the contacts to report on, or a date range, etc.

SECTION	REPORT	DESCRIPTION	CLICK THE REPORT NAME LINK AND THEN DEFINE THE CRITERIA AS FOLLOWS:
Contact Reports	Card List	Contact card list	<a href="#">Select the contacts</a> you want to include, then click <b>View Report</b> (see below).
	Phone List	Contact phone number list	<a href="#">Select the contacts</a> you want to include, then click <b>View Report</b> (see below).
	Mailing List	Contact mailing address list	<a href="#">Select the contacts</a> you want to include, then click <b>View Report</b> (see below).
	Birthday List	Contact birthdays by date	Enter the Start and End Date, then click <b>View Report</b> (see below).
	Property Purchase Date Anniversary Report	List of property purchase anniversaries by date	Enter the Start and End Date, then click <b>View Report</b> (see below).
	Contacts Who Do Not Accept Mass Emails	List of contacts set to not receive mass emails	Click <b>View Report</b> (see below).
	Business Directory	Business Directory listing	Click <b>View Report</b> (see below).
	Move In Date Anniversary Report	List of contact move in anniversaries by date	Enter the Start and End Date, then click <b>View Report</b> (see below).
Original Source of Contact Reports	Referral History	Contact referral history by date	Enter the Start and End Date, then click <b>View Report</b> (see below).
Task & Appointment Reports	Outstanding Tasks	List of all incomplete tasks	Click <b>View Report</b> (see below).

	Appointment Summary	Summary of appointments by date	Enter the Start and End Date, then click <b>View Report</b> (see below).
Active Business Reports	Active Business	List of current Active Business listings	Click <b>View Report</b> (see below).
	Active Buyers	List of current Active Buyers	Click <b>View Report</b> (see below).
	Transaction Summary	Active Business Transaction Summary	Enter the Start and End Date, then click <b>View Report</b> (see below).

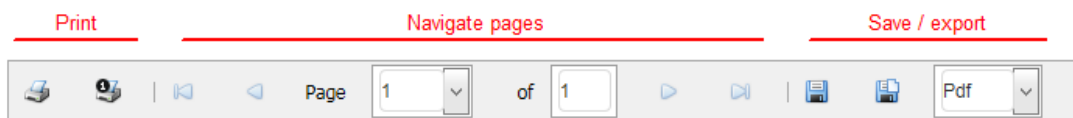
**Tip** To print a comprehensive overview of a single contact that includes all of the contact’s profile information, as well as their complete contact history, open the contact record and click the **Print Profile** icon in the contact profile tab.



*The Outstanding Tasks and Appointment Summary reports allow for the selection of the team member for the report. You can only generate the Outstanding Tasks report for other team members if they are sharing their task list. You can only generate the Appointment Summary report for other team members if they are sharing their calendar. The various Active Business Reports also allow for the selection of a team member. If a team member is selected, the Active Business and Transaction Summary reports only include listings to which the team member is assigned as an agent. The Active Buyers report only includes buyers for which the team member is assigned as the buyer agent.*

### Printing or exporting a report

When you click **View Report**, the report is displayed with the following toolbar:



- To print a report, click the **Print** icon on the left.
- To navigate through the pages of a multi-page report, use the controls in the center of the toolbar.
- To open or save the report in PDF format, select Pdf from the drop-down list on the right and click the **Save** icon. When the File Download screen appears, click **Open** or **Save**.
- To open or save the report in Excel format, select Xls from the drop-down list on the right and click the **Save** icon. When the File Download screen appears, click **Open** or **Save**.
- To generate another report, click **Back to Reports**.

## Utilities

### Processing Imported or Synchronized Contacts

If you have imported, lead capture or synchronized contacts that have not yet been accepted into your contact list, these contacts will appear in the Imported and Synchronized Contacts list in the Utilities area.

**Note** The number of contacts in this list is also displayed next to the Utilities icon in the secondary menu.

### Processing duplicates

Since contacts can be imported or synchronized from multiple sources, it is possible that contact records that are already in your IXACT Contact contact list will come in again from another source. The processing of imported and synchronized contacts allows you to easily identify and eliminate these duplicate contact records. Duplicate contacts are identified with an asterisk in the leftmost column in the list. A contact is identified as a duplicate if there is an existing contact with the same first and last name, or the same email address.

If you know that there are no duplicates, just click **Accept All** to easily move all imported and synchronized contacts to your contact list.



*Upon mass accepting contacts, Team Leaders and administrators have the option to assign one or more team members visibility to the contacts.*

To process your pending contacts:

1. Click **Utilities** in the secondary menu in the top right corner.  
The Source column lets you know where each pending contact came from. For contacts that came via lead capture, click **View Comment** to see the comments entered by the lead.
2. If a pending contact is a duplicate, click **Reject**. Otherwise, click **Accept** to move the contact directly into your contact list, or click **Update** to open the contact for editing before saving it to your contact list. Contacts entered via lead capture are added with a contact status of New/Unqualified. All other contacts are added with a contact status of Unassigned.

**Note** If the pending contact is a duplicate but has more complete information than the existing contact, you may want to accept the pending contact and then delete the existing one. However, please remember that all other information entered for the existing contact (i.e. properties, notes, Keep in Touch events, etc.) will also be deleted.



*If you are a member of a team, in order to reject pending contacts, the Team Leader will need to grant you permission to delete contacts.*

3. If your contact list is empty or you know that there are no duplicates, simply click **Accept All**.

## Exporting Contacts from IXACT Contact

You can export your IXACT Contact contact records into a .csv (comma-separated values) file.



*If you are a member of a team, the Team Leader must grant you permission to export the contact list.*

To export contacts:

1. In IXACT Contact, click the **Utilities** icon in the secondary menu (top right of your screen).
2. Click the **Export IXACT Contacts** button.

**Note** The export can take some time depending on the size of your database. If you are unable to generate an export file, please call Customer Support at 1-866-265-6990.

## Self-Serve Contacts Import

If you have a contact list in CSV file format, you can import your contacts into your IXACT Contact database by clicking the **Utilities** icon in the secondary menu (top right of the screen) and selecting the Import Contacts tab.

Here are a few things to keep in mind before you begin:

- The file **MUST** be in CSV (comma separated value) format. If your contacts are in an Excel file, you can save the file to CSV format by using the Save As function and selecting 'CSV (Comma delimited)' as the file type.
- Note** Excel will only save the first tab of your spreadsheet to CSV format. If your spreadsheet includes multiple tabs of contacts, you will either need to combine them in one tab or create multiple Excel files.
- Each column in your file should include a single value to be mapped to a corresponding field on the IXACT Contact contact record. Each IXACT Contact field can be mapped to only once.
  - You can import multiple Contact Groups for each contact. To do so, the groups must be in a single column separated by commas and wrapped in double-quote characters.
  - All date columns must include a month, day and year separated by slashes, hyphens or periods. For each date column being imported, you will need to specify the order of the month, day and year elements.
  - You can import up to 2,000 contact records at a time. If you have more than 2,000 contacts, you will need break your CSV file up into multiple files.
  - Each contact must include a first name, last name or company name in order to be imported.

- Before starting your import, you should first ensure that the Imported and Synchronized Contacts list in the Utilities tab is empty.

### Step 1 – Upload your file

1. Indicate whether or not your file includes column headers in the first row of data.

**Note** If possible, you should include column headers in your file, as this will make the import process easier and help ensure the most accurate and complete import of your contacts.

2. Click **Select File** and select the CSV file containing your contacts from your computer.
3. Click **Upload**.
4. A summary of the file contents and a preview of the data are displayed at the bottom of the page. When you are ready, click **Next** to proceed to the next step.



## Step 2 – Column Mapping

In this step you will 'map' each column in your file to the corresponding contact record field in IXACT Contact.

Each row represents a column in your file. For each column, select the IXACT Contact field you wish to map it to. Once an IXACT Contact field is selected, it cannot be selected for another column.

**Note** If your file includes column headers, the system will attempt to automatically map each of your columns to the appropriate IXACT Contact field based on the column header. You should double-check each column to confirm that it has been properly mapped.

You can click the plus sign to the left of any column in order to see a sample of the data in your file.

Any column with '(Ignore)' selected for the IXACT Contact field will not be imported.

For any selected date fields (birth dates, wedding anniversary, move in anniversary), be sure to select the date format using the list to the right of the selected field. The date format indicates the order of the year, month and day for each value in your file.

## Step 3 – Validation & Other Options

Before executing the import, the system will automatically validate your contact data and mapping selections to confirm that all data can be successfully imported. If any validation errors are encountered, the details of each error will be displayed at the top of the page. You can execute the import by clicking **Import Anyway**, but some contact records and/or column values will not be imported. We recommend clicking **Fix Mapping** instead in order to go back to the previous step and fix the validation errors.

Before completing your import, you can assign the following additional values to all of your imported contacts:

- An initial contact Status (defaults to Unassigned).
  - An Original Source selected from your custom list. (You can add a new Original Source on-the-fly by clicking the Modify List link.)
- Note** This option is only available if you did not map a column in your file to the Original Source field.
- One or more Contacts Groups selected from your custom group list. (You can add one or more new groups on-the-fly by clicking the Modify List link.)

The Import Label will also automatically be assigned as a Contact Group to your imported contacts so that you can easily find the contacts added during the import.

Assuming there are no validation errors with your data, when you are ready, click **Import** to complete your import.

Your imported contacts are not immediately added to your contact database. To review your imported contacts in the Imported and Synchronized Contacts list, click the **Utilities** icon in the secondary menu (see [Processing Imported or Synchronized Contacts](#)).

## Merging Duplicate Contacts

If you have duplicate contact records in your database, IXACT Contact gives you the ability to easily identify and merge those duplicates. You can either have the system search for duplicates across your entire database for you, or you can identify duplicates yourself using **List View**.



Only the Team Leader and administrators can use the Merge Duplicate Contacts feature.

### Let the system find duplicates for you

To have the system intelligently identify duplicates in your database for you, start by clicking the **Utilities** icon in the secondary menu (top right of the screen) and select the Merge Duplicate Contacts tab.

**Note** When checking for duplicates, the system only includes contacts that have been accepted into your database. It does not include “pending” contacts in the Imported and Synchronized Contacts list in the main **Utilities** page. (These contacts are identified as duplicates with an asterisk in the first column if they match a contact in your database on name and/or email address.) If you wish to merge a contact in this list using the Merge Duplicate Contacts feature, you must first accept the contact into your database.

You first must decide the criteria by which you want the system to automatically identify duplicate contacts in your database. You have the following options:

- **Name** – Exact match on main contact first and last name
- **Email** – Match on at least one main contact email address
- **Phone** – Match on at least one main contact mobile or home phone number – this ignores special characters found in phone numbers (i.e., (, ), -)
- **Exact Match** – Match on name and email address and phone number – includes contacts where these fields are blank on all records.

Once you have selected your desired matching criteria, click **Find Duplicates**.

The system will return one or more “Groups” of duplicates. Each Group includes two or more matching contacts. Key data points are displayed for each contact record in order to help you decide which contact record to keep (or merge into), and which contact record or records to delete (or merge from). Each Group includes the following options before merging your contacts:

- If you do not wish to merge a Group at all, click the plus/minus toggle at the top left of the Group to hide its details.
- The “Master” contact record is the contact record that will be kept (or merged into) when you merge a Group. The Master record initially appears at the top of each Group, and defaults to the contact record that was added to your database first. You can change the Master record by clicking Set As Master next to another contact record that you wish to set as the master.
- If a Group includes more than two contact records and you do not wish to include a contact in the merge, you can exclude it by selecting Exclude for the Include/Exclude toggle. Note that to merge a Group, at least one contact other than the Master must be set to Include.

When you merge a group of contacts, the following “merge rules” are applied:

- **INCLUDED CONTACTS NOT SET AS THE MASTER WILL BE DELETED FROM YOUR DATABASE.** While these contacts will be stored in your Recycle Bin and can be restored, all activities for the contacts will be deactivated and unassigned, and all tasks and calendar appointments for the contacts will be permanently deleted. (For more information about deleting and restoring contacts, see [Deleting Contacts](#).)
- Only information from the Contact Profile page is merged. All other information and activities for the non-master contact records is not merged.
- Each Contact Profile field on the master record is only updated if the field is blank on the master record and not blank on one of the non-master records.
- Non-matching phone numbers and email addresses from non-master contact records will be added to the master contact.
- Additional contact Groups from the non-master record will be added to the master record.
- Household Members are not updated.
- If any contact in a group has unsubscribed from mass emails, then the master contact record will be set to not Accept Mass Emails.



The team member visibility on the master record is not updated.

When you are absolutely sure that you have set the desired options for a group, click **Merge**.

Once a group of contacts is merged, it will disappear from the list of groups, and you can move onto the next group.

### Identifying duplicates yourself using List View

If you know that two or more contacts in your database are duplicates, you can identify them yourself using **List View** (see [Using List View](#)). Once you have selected your contacts, select the **Merge Duplicates** option from the Select Action list.

Your selected contacts are returned to one merge ‘Group’. You can use the same options described above to set your merge options for the group. When you are ready to merge your contacts, click **Merge**.

## User Profile

### Changing Your User Profile Settings

The User Profile area allows you to set up your system preferences, as well as things like your password and branding.

To change your user profile settings:

1. Click **User Profile** in the secondary menu (top right of your screen).
2. In the User Profile tab, change any of the system settings as appropriate:
  - If you want to receive email reminders for appointments and tasks, click **Change Preferences** and select **Enable Reminder Emails**, then click **Save**. Reminders are set when you create an [appointment](#) or a [task](#), and you will receive a reminder email message at the address used as your User ID. *Email reminders were automatically enabled when you signed up for IXACT Contact.*
  - If you want to change your default letter margins, click **Change Preferences**, select the margins that best fit your letterhead, and click **Save**.
 

**Note** If none of the margin choices fit your letterhead, please contact us and we will try to accommodate your requirements.
  - If you want to set the default city/town and state/province that will auto-populate when entering addresses, click **Change Preferences**, fill in the fields, then click **Save**.
  - If you want to change the default email/letter salutation that is set for your new contacts to something other than 'Dear', click **Change Preferences**, select your desired salutation from the list, then click **Save**. If the salutation you want to use is not in the list, you can click **Add Your Own** to add it.
  - If you want to change the primary phone number type that displays for your contacts throughout the system, click **Change Preferences**, select the phone type from the list, and click **Save**.



Click **Calendar & Task List Sharing** to set whether or not you make your calendar and/or task list available to other team members. By default, calendar and task list sharing are turned on.

- To change your password or the time zone you are working in, click the appropriate link. Enter the new information and click **Save**.
- To turn on the wireless synchronization service, see [Wireless Synchronization](#)

## Changing Your Account Information

The User Profile contains your contact and billing information. This is the information that you provided when you first subscribed to IXACT Contact, but you can change it here.

To change your contact and address information:

1. Click **User Profile** in the secondary menu (top right of your screen).
2. In the Contact & Address Info tab, change any of the information as required and click **Save**.

**Note** Remember, your email address is your User ID for logging in to IXACT Contact.

To update your billing information:

1. Click **User Profile** in the secondary menu (top right of your screen).
2. In the Billing Info tab, enter your new credit card information and click **Save**.

## Setting Up Your Email Header

IXACT Contact allows you to set up personal email headers that you can include in your email communications. You can set up a Standard header, a Custom Header, or both.



*Each member of a team can set up their own email header. When creating mass emails, you can select which team member branding you wish to use for each email.*

To set up your Email Header options, click **User Profile** in the secondary menu (top right of your screen), and then click the **Email Header** tab.

The Email Header type you select here will be used by default for all emails you send using IXACT Contact.

**Note** If you take advantage of the Monthly e-Newsletter feature and you want your e-newsletter emails to be mobile-friendly, meaning they can be easily read on all devices including smartphones, then you should set up your Standard Header, and select the Standard Email Header option when setting up your e-Newsletter. You can still set up and select a Custom email header for all other email types.

If you wish to include your selected email header in all new mass emails, check the box below.

*To set up a Standard Email Header:*

1. Upload your photo:
  - a) Click **Upload Photo**.
  - b) Next to Select Photo File, click **Browse** to select the picture file from your computer.

- c) Click **Upload Photo**.
  - d) Your photo will now be displayed on the screen. If you are happy with the photo, click **Save**. (If you do not wish to use the photo, click **Browse** again to select a different photo, or click **Cancel**.)
2. Upload your logo:
- a) Click **Upload Logo**.
  - b) Next to Select Logo File, click **Browse** to select the logo file from your computer.
  - c) Click **Upload Logo**.
  - d) Your logo will now be displayed on the screen. If you are happy with the logo, click **Save**. (If you do not wish to use the logo, click **Browse** again to select a different logo, or click **Cancel**.)
3. Select whether you would like to use the Modern or Classic design of the Standard header. The Modern design requires the selection of a color for the design that you can select to match the primary color in your personal branding.

Depending on the header type you select, the screen displays a preview of what your actual Standard email header will look like in your email messages.

**Note** The contact information that is included in your Standard email header is the information that you provided when you first subscribed to IXACT Contact. You can edit this information in the Edit Contact & Address Information tab in the User Profile area. For more information, see [Changing Your Account Information](#).

**Note** Photo and logo files must be in .gif, .jpeg/.jpg or .png format.

You can create a Custom email header using the wysiwyg ("what you see is what you get") [content editor](#). The editor has many of the same features as word processor software like Microsoft Word. If you're not sure what a tool does, hover over the buttons with your mouse and the name of the function will appear. The recommended width for your Custom email header is 580px. Be sure to click **Save** at the top of the page once you have finished setting up your email header.

**Note** The content editor Image Manager gives you access to the same image library that you use when creating your mass emails.

## Creating a Signature for Your Emails and Letters

IXACT Contact allows you to set up a signature that you can include at the end of your letters and mass emails.



*Each member of a team can set up their own signature. When creating letters or mass emails, you can select which team member branding you wish to use.*

To set up your signature:

1. Click **User Profile** in the secondary menu (top right of your screen).
2. Click the **Signature** tab.
3. Create your signature using the wysiwyg ("what you see is what you get") [content editor](#). The editor has many of the same features as word processor software like Microsoft Word. If you're not sure what a tool does, hover over the buttons with your mouse and the name of the function will appear.

**Note** The content editor Image Manager gives you access to the same image library that you use when creating your mass emails.

4. Click **Save**.

## Purchasing Your Custom Texting Number

Before you can start sending text messages from IXACT Contact, you must first purchase your custom texting phone number. All text messages sent from IXACT Contact will come from your purchased custom number, not your own mobile number. Before purchasing your custom number, if you have not already done so, you will need to enter and verify your own mobile phone number.

Your custom texting phone number costs \$5.00 per month, which includes up to 100 text messages per month at no additional charge. Upon purchasing your number, your credit card will immediately be charged \$5.00 (plus applicable taxes). You will then be automatically charged \$5.00 each subsequent month, unless you cancel the texting service. Additional text messages can be purchased if required (see [Purchasing More Texts](#)).

To enter and verify your personal mobile number (if you have not already done so):

1. Enter your own mobile phone number.
2. Click **Send Verification Code**.
3. Your 4-digit verification will be sent to your mobile phone as a text message. Enter the code and click **Verify**.

**Note** If your personal mobile number changes, be sure to immediately update and verify your new phone number by clicking **Change Mobile Number**.

You can now purchase your custom texting phone number:

1. Click **Purchase Custom Number**.
2. Enter the area code you would like for your phone number and click **Search**.

**Note** There may not be any available phone numbers with your preferred area code. Try other valid area codes for your area until the search returns available phone numbers.

3. Select the number you want to purchase.
4. Read and agree to our [Acceptable Use Policy](#).
5. Click **Purchase**.

## Setting Up Your Keep in Touch Options

IXACT Contact provides two different approaches to help you Keep in Touch and stay top-of-mind with everyone in your Business Pipeline.

To set up your Keep in Touch options, click the **User Profile** in the secondary menu (top right of your screen), and click the **Keep in Touch** tab.

You can turn on the “Keep in Touch Coach” Dashboard widget, and be automatically prompted to reach out to your contacts based on their Status and a configurable follow up frequency.



*Each Team Member can opt to hide the Keep in Touch Coach widget by unselecting Enable Dashboard Widget. Team Leaders and Administrators have the option to have the Keep in Touch Coach display all contacts, or only contacts explicitly assigned to the team member.*

The Keep in Touch Coach automatically resets each time you record a prospecting activity for a contact (see [Recording Prospecting Activities for a Contact](#)).

Upon turning on the Keep in Touch Coach, set the follow-up frequency for each Status using the list at the bottom of the page. Use the On/Off check box to set whether contacts in the Status are included, and, if so, set the number of days subsequent to their last prospecting activity that the contact is presented by the widget.

If the preset list of contact Statuses do not meet your business needs, you can create up to three of your own “custom” Statuses at the bottom of the page. If you have turned on the Keep in Touch Coach, you can choose whether to include each custom status in the coach, and set the desired follow-up frequency. Your custom statuses are also added to your Business Pipeline (see [About the Business Pipeline](#)).

Alternatively, you can enable the “Keep in Touch Calls” functionality in order to add recurring call reminders to your Task List and/or Calendar at a selected regular interval (see [Defining Keep in Touch Call Events](#)). You can search your Task List just for Keep in Touch Calls, turning it into your daily “Call List” (see [Using the Task List](#)). Unlike the Keep in Touch Coach, Keep in Touch Calls are not based on contact Status. Instead, you select the call interval for each contact.

To turn this on, simply select the *Enable Keep in Touch Calls Functionality* check box.

*While you can turn on both features, we highly recommend using one or the other in order to establish a consistent “Keep in Touch” strategy. If you’re unsure which approach to use, we recommend the Keep in Touch Coach.*

## Capturing Leads

### About Lead Capture

IXACT Contact provides a number of ways to automatically capture your leads into your IXACT Contact database. Depending on where your leads come from, you may be able to take advantage of any number of these options.

To set up your lead capture, click the **User Profile** icon in the secondary menu (top corner of the screen), then click the **Lead Capture** tab.



## Lead Distribution (For Teams)

The Lead Distribution feature helps you ensure that all leads are followed up on quickly and effectively by your team.

**Note** Only the Team Leader and Administrators can set up Lead Distribution.

With Lead Distribution you can *broadcast* new leads to selected members of your team 'jump ball' style, and your team members can claim and action your leads of a first-come-first-serve basis.

Lead notifications, with a clickable link to claim the lead, can be sent to each team member by email and/or text.

**Note** Leads sent directly to a team member will still be automatically assigned to that team member, and will not be part of Lead Distribution.

To turn on and configure Lead Distribution:

1. Click **User Profile** in the secondary menu (top right of your screen).
2. Click the **Lead Capture** tab.
3. Under the **Lead Distribution** section, select *Enable Lead Claiming*.
4. In the Team Member list that appears below, for each team member that you want to be notified of new leads, select whether they are to receive email and/or text alerts.

**Note** To turn on text alerts for a team member, that team member must first set up text lead notifications in their own IXACT Contact account.

5. Click **Save**.

## Setting Defaults for New Leads

The New Lead Settings section allows you to set the following options for all new leads, regardless of where they come from:

- Whether you wish to receive an email notification of each new lead.
- Whether you wish to receive a text/SMS notification of each new lead.
- Whether you want to automatically receive new leads directly into your database. If you prefer to review your new leads before accepting them into your database (see [Processing Imported or Synchronized Contacts](#)), leave this option unchecked.
- The Original Source of Contact to assign to each new lead.
- The Marketing Activity Plan to assign to each new lead.
- The Contact Group to assign to each new lead.

All contacts captured using any of our lead capture options are initially assigned a Contact Status of 'New/Unqualified'.

## Capturing Leads from Emails

Are you already receiving leads via email?

If so, go to the **Lead Capture – Email** section of the **Lead Capture** tab in the User Profile area, and select the *Enable Lead Capture Via Email* check box. Then, log in to the administrative area of your website or lead vendor site and change your notification email address to your lead capture email address. Your leads will automatically be added to your IXACT Contact database.



*Each Team Leader can capture their own email leads by using their unique lead capture email address.  
Each team member can receive their own email and/or text notifications when they receive a lead.  
Email leads captured by a team member are automatically assigned to the team member.*

If you are receiving email leads from more than one website or lead vendor, you can set this up for as many different lead sources as you wish.

**Note** If you do not know how to change your lead notification email address, contact your website or lead vendor, and they should be able to assist you.

**Note** Since your lead email notifications will be redirected to your special lead capture email address, make sure to turn on email notifications in your **New Lead Capture** so you are still notified of your email leads.

Upon receiving each lead email, we will create a new contact record by scanning the body of the email and mapping as much information as possible to specific contact profile fields. All information in the body of the email that cannot be mapped to specific fields will be inserted into the Original Source of Contact Notes field. This way you will not lose any of the valuable lead information.

**Note** Our email lead capture has been programmed to map as much information as possible to specific contact profile fields. If there is information in your emails that you feel should be mapped to specific fields, but is ending up in the Original Source of Contact Notes, let us know, and we will see if we can make the necessary programming changes.

New email leads that are not accepting directly into your database appear in the Imported & Synchronized Contacts list in the Utilities area with a Source of 'Contact Us'. Once accepted into your database, the contact Entered By is also set to 'Email Lead Capture'.

## Building Your Own Form

IXACT Contact allows you to easily add a customized page to your website so that visitors can fill out a "Contact Us/Me" form and their contact information is automatically added to your IXACT Contact database.



*Each member of a team can set up their own Contact Us form using their own branding. Each team member can receive their own email and/or text notifications when someone fills out their Contact Us form. Leads who fill out the team member's Contact Us form are automatically assigned to the team member.*

**Note** If you are going to build your own form, make sure you turn on the option to receive an email notification of each new lead.

Set up your Contact Us/Me form by following the step-by-step instructions under the **Lead Capture – Build Your Own Form** section of the **Lead Capture** page.

Your personalized HTML code can now be copied to your website in order to add your new Contact Us/Me page. The HTML code can be used with any text or image hyperlink. If you have a webmaster who is responsible for the administration of your website, they should be able to help you add your new Contact Us/Me page.

For further assistance, please call Customer Support at 1-866-265-6990.

New leads from your form that are not accepted directly into your database appear in the Imported & Synchronized Contacts list in the Utilities area with a Source of 'Contact Us'. Once accepted into your database, the contact Entered By is also set to 'Contact Us'.

## Zillow Tech Connect

IXACT Contact is a member of Zillow's Tech Connect program, which allows you to automatically flow all of your Zillow leads directly into your database.

In addition to capturing each lead's name, email address and phone number, we also capture their buying preferences as well as the details of the property that they have expressed interested in.

Tech Connect is set up from within your Zillow account.

To set up Zillow Tech Connect for IXACT Contact:

1. Go to your Zillow Profile, and in your Account settings, select **Connect to My CRM**.
2. Click **Add Partner**.
3. From the **Select a Partner** list, select "IXACT Contact".
4. In the **Partner ID** box that appears, enter the email address that you use to login to IXACT Contact.
5. Click **Save**. IXACT Contact will now appear in the partner list.

**Note** You do not need to do anything in IXACT Contact. Once you complete your setup in Zillow, your Zillow leads will immediately start flowing into your IXACT Contact database.

**Note** After setting up Zillow Tech Connect, you will continue to receive new lead email notifications from Zillow. Depending on whether you receive electronic leads from other sources, and how you are notified of these leads, you may or may not want to turn off IXACT Contact lead notifications in your New Lead Settings.

New Zillow leads that are not accepted directly into your database appear in the Imported & Synchronized Contacts list in the Utilities area with a Source of 'Zillow Tech Connect'. Once accepted into your database, the contact **Entered By** is also set to 'Zillow Tech Connect'.

All property details appear in the Notes field in the Original Source of Contact section of the Contact Profile tab.

Buying preferences appear in the Buying Preferences section of the Properties tab.

## FiveStreet Integration

If you use FiveStreet to capture your leads, you can set up FiveStreet so that your new leads automatically flow right into your IXACT Contact database.

To set up FiveStreet/IXACT Contact integration, you'll need your IXACT Contact encrypted lead capture ID. You can find this at the bottom of the **Lead Capture** tab of your **User Profile**. Copy your lead capture ID by highlighting and copying it. Then follow these steps in FiveStreet.

1. Login to FiveStreet, and select **Add-Ons & Integrations** under the Account settings menu.
2. Find IXACT Contact in the Add-Ons & Integrations list and click **Configure**.
3. Paste your IXACT Contact lead capture ID in the box provided.
4. Click **Save**. The OFF indicator will now change to ON next to IXACT Contact in the list.

**Note** You do not need to do anything in IXACT Contact. Once you complete your setup in FiveStreet, your FiveStreet leads will immediately start flowing into your IXACT Contact database.

**Note** After setting up FiveStreet integration, you will continue to receive new lead email notifications from FiveStreet. Depending on whether you receive electronic leads from other sources, and how you are notified of these leads, you may or may not want to turn off email lead notifications in your New Lead Settings.

New FiveStreet leads that are not accepted directly into your database appear in the Imported & Synchronized Contacts list in the Utilities area with a Source of 'FiveStreet'. Once accepted into your database, the contact Entered By is also set to 'FiveStreet'.

## Form Post & Web Service

The lead capture Form Post & Web Service options are more technical alternatives for feeding more complete lead information into IXACT Contact. If you work directly with a website or lead vendor, and you are interested in taking advantage of these options, please call Customer Support at 1-866-265-6990.

## Setting Up Your Lead Auto-Responders

With IXACT Contact you can auto-respond to your new leads by email, text message, or both. By responding immediately to your new leads, you significantly increase the chances of eventually turning that each lead into an actual client.

To set up your auto-responders:

1. Click **User Profile** in the secondary menu (top right of the screen).
2. Click the **Lead Capture** tab.
3. Scroll down to the **Lead Auto-Responder** section.

## Email Auto-Responder

To set up an email auto-responder, you first need to create the email template that you will use for your response (see [Using Email Templates](#)).

To set up your email auto-responder:

1. Select the *Send an immediate email response to new leads* check box.
2. Use the Category and/or Keyword Search options to search for your email template.
3. Select your desired template from the list.



*If you are a member of a team, the lead auto-response email will automatically use the branding of the team member who received the lead.*

**Note** Only leads that provide an email address will receive your email auto-response.

## Text Auto-Responder

Before you set up your text auto-responder, you must first [purchase your custom texting phone number](#).

To set up your text auto-responder:

1. Select the *Send an immediate text response to new leads* check box. (If the check box is not available, you must [purchase your custom texting number](#) first.)
2. Enter your auto-responder message in the area below.

**Note** You can personalize the message by selecting the desired merge field from the list below the message area.

**Note** A text segment is up to 160 characters and each segment requires 1 texting credit. As you type your text message, the indicator below the message area tells you how many characters you have entered, and how many segments are required. If your text message exceeds 160 characters, you will require more than 1 texting credit per auto-response message.

**Note** Only leads that provide a mobile number will receive your text auto-response.

Once you have set up all of your lead auto-responder options, be sure to click **Save** at the top of page.

## Capturing Email Correspondence

With **Email Correspondence Capture** you can easily save your emails with your contacts to their Contact History.

This feature allows you to automatically capture emails sent and received using your own email software, and it not to be confused with the Mass Email feature for which contact history records are already automatically captured.

This is how it works:

## Emails Sent

When you send an email to an email address that matches a contact's email in your IXACT Contact database, simply enter the email address notes@ixactcontact.com in the Bcc field, and the email subject and body will automatically be added to your contact's contact history. If you send an email to multiple matching contact email addresses, the email contents will be added to the contact history of all the matching contacts.

Contact history records added using email capture are assigned an Activity Type of 'Email' with a Performed By of 'Email Capture'.

**Note** When HTML-formatted emails are captured, only the text of the email is captured and displayed.

**Note** While the notes@ixactcontact.com email address can be entered in any one of the To, Cc or Bcc fields, the email addresses of your contacts can only be entered in the To or Cc fields.

## Emails Received

There are two ways to capture the contents of an incoming email to the sender's contact history.

- Simply send a short reply acknowledging receipt, and enter notes@ixactcontact.com in the Bcc field.
- If for some reason you do not wish to reply to the email, you can forward the email to notes@ixactcontact.com, and follow the steps described in the Unassigned Emails section below.

For security reasons, all email capture emails must be sent from an authorized email address. The email address you use to sign in to IXACT Contact is automatically an authorized address. If you want to send emails from other email addresses, click the **Modify List** button next to the list, and add the email addresses to the authorized list.



*If you are a member of a team, you can also send email capture emails from the email address you use to sign in to IXACT Contact. However, only the Team Leader can add additional email addresses to the authorized list.*

## Unassigned Emails

If you send an email to notes@ixactcontact.com and do not include any other email addresses that match the email address of a contact in your database, the email cannot be automatically associated with a contact. Instead the email will be added to the Email Correspondence Capture – Unassigned Emails list in the Utilities area.

The Email Correspondence Capture – Unassigned Emails list displays the email address the email was sent from, the Subject of email, and the date and time the email was sent. Click **View Body** to see the contents of the body of the email. Click

**Link to Contact(s)** to search for and select one or more contacts that you want to link the email to.

If you have questions or require further assistance, call Customer Support at 1-866-265-6990.

## Synchronization Services

### Wireless Synchronization

#### *Wireless Synchronization*

#### What does wireless synchronization do?

IXACT Contact's wireless synchronization service allows you to easily synchronize your contact list, appointments and task list in IXACT Contact with existing applications on your iPhone or Android smartphone ((or any other smartphone that supports ActiveSync), as well as Microsoft Outlook and applicable Mac applications. There is no new software to install or learn.



*If you are a member of a team, the Team Leader must grant you permissions to wirelessly synch the team contact list.*

Synchronization works in both directions -- this means that any changes you make in IXACT Contact are instantly reflected in the corresponding application on your wireless device or desktop, while changes made on your wireless device or desktop are automatically updated to IXACT Contact. Not only do you have access to your key IXACT Contact data at all times, but you can actually manage this data directly on your mobile device or desktop without having to learn any new software.

**Note** Wireless synchronization does not include email. You will continue to use your existing email address(es) and send and receive email the same way you do today.



#### **Wireless synchronization or Google Sync?**

With IXACT Contact, you can either synchronize directly with your wireless device, or you can synchronize your Gmail contacts and your Google calendar. If you already use Gmail and Google Calendar, we recommend setting up [Google Sync](#). If you also synchronize your wireless device with Google, this will establish a 3-way sync between IXACT Contact, Google and your wireless device.

If you do not use Gmail or Google Calendar, then you can set up Wireless Synchronization in order to sync IXACT Contact with your wireless device.

For further guidance on whether you should set up Wireless Synchronization or Google Sync, please call customer support at 1-866-265-6990.



#### **Important notes about wireless synchronization:**

- Contacts, appointments, and tasks (reminders) entered on your phone prior to setting up wireless synchronization will NOT be synchronized to IXACT Contact. You can leave them on your phone, but they will never be added to IXACT Contact. This means that in order to get your contact list into IXACT Contact, you will first need to synchronize your phone with Gmail, Apple iCloud

or Microsoft Outlook, export your contacts, and then [import your contacts](#) into IXACT Contact. Then, when setting up wireless synchronization, you should remove your existing contacts from your phone in order to avoid duplicate contact data.

- While wirelessly synchronizing your wireless device with IXACT Contact, we can also set up synchronization between IXACT Contact and Microsoft Outlook or applicable Mac applications.
- Sometimes not all phone types and numbers synchronize between your phone and IXACT Contact. There may be some phone types on your phone that do not synchronize to IXACT Contact. Also, if a contact in IXACT Contact has multiple phone numbers with the same phone type, only one of the phone numbers will synchronize to your phone.

**IMPORTANT:** When it is time to replace your current device with a new one, please be sure to call IXACT Contact Customer Support before doing so. We will take the necessary steps to ensure that all your IXACT Contact data is properly transferred to your new device, and that none of your valuable information is lost.

## Getting set up

If you would like to set up Wireless Synchronization, please contact customer support at 1-866-265-6990.

### ***Setting Up Your Mobile Device***

#### **Setting Up Your iPhone**

##### **Backing up your iPhone**

Prior to setting up wireless synchronization on your iPhone, we strongly recommend that you backup your iPhone to your computer. For instructions on backing up your iPhone with iTunes, click [here](#).

##### **Setting up your iPhone for wireless synchronization**



#### **Notes about iPhone wireless synchronization:**

Contacts, appointments, and tasks entered on your iPhone prior to setting up wireless synchronization will NOT be synchronized to IXACT Contact. You can leave them on your iPhone, but they will never be added to IXACT Contact.

This means that in order to get your iPhone contact list into IXACT Contact, you should first synchronize your iPhone with Apple iCloud, Apple Contacts or Microsoft Outlook, export your contacts, and then [import your contacts](#) into IXACT Contact. Then, when setting up wireless synchronization, you should remove your existing contacts from your iPhone in order to avoid duplicates.

To set up your iPhone, please contact customer support at 1-866-265-6990.

##### **Synching your iPhone with Microsoft Outlook or Mac Applications**

While wirelessly synchronizing your iPhone with IXACT Contact, we can also set up synchronization between IXACT Contact and Microsoft Outlook or applicable Mac



applications. However, you cannot synchronize your iPhone directly with Microsoft Outlook or applicable Mac applications.

#### **What happens to my data if I remove synchronization from my device?**

All synchronized contacts, appointments and tasks stored in IXACT Contact are removed from the device. If any contacts, appointments and tasks that existed on the device prior to setting up synchronization were kept on the device, they remain on the device after synchronization is removed.

#### **Removing wireless synchronization**

If you want to stop synchronizing your iPhone with IXACT Contact, please call our support department at 1-866-265-6990. We will assist you with removing synchronization and getting your IXACT Contact data back onto your iPhone. If you attempt to remove synchronization without contacting us, you may lose all of the IXACT Contact data on your iPhone.

#### **Replacing your iPhone**

If you are replacing your iPhone, please call our support department at 1-866-265-6990 and we will help you set up wireless synchronization on your new iPhone.

### **Setting Up Your Android**

#### **Backing up your Android**

Prior to setting up wireless synchronization on your Android, we strongly recommend that you backup your Android to your computer.

#### **Setting up your Android for wireless synchronization**



#### **Notes about Android wireless synchronization:**

- Contacts, appointments, and tasks entered on your Android prior to setting up wireless synchronization will NOT be synchronized to IXACT Contact. You can leave them on your Android, but they will never be added to IXACT Contact.  
This means that in order to get your Android contact list into IXACT Contact, you should first synchronize your Android with Gmail, export your contacts, and then [import your contacts](#) into IXACT Contact. Then, when setting up wireless synchronization, you should remove your existing contacts from your Android.
- For new contacts on your Android to be synchronized with IXACT Contact, they must be entered with a Contact source of Exchange.
- For new calendar appointments on your Android to be synchronized with IXACT Contact, they must be added to the Exchange calendar.

To set up your Android, please contact customer support at 1-866-265-6990.

#### **Synching your Android with Microsoft Outlook or Mac Applications**

While wirelessly synchronizing your Android with IXACT Contact, we can also set up synchronization between IXACT Contact and Microsoft Outlook or applicable Mac

applications. However, you cannot synchronize your Android directly with Microsoft Outlook or applicable Mac applications.

#### **What happens to my data if I remove synchronization from my device?**

All synchronized contacts, appointments and tasks stored in IXACT Contact are removed from the device. Any contacts, appointments and tasks on the device that do not synchronize with IXACT Contact will remain on the device after synchronization is removed.

#### **Removing wireless synchronization**

If you want to stop synchronizing your Android with IXACT Contact, please call our support department at 1-866-265-6990. We will assist you with removing synchronization and getting your IXACT Contact data back onto your Android. If you attempt to remove synchronization without contacting us, you may lose all of the IXACT Contact data on your Android.

#### **Replacing your Android**

If you are replacing your Android, please call our support department at 1-866-265-6990 and we will help you set up wireless synchronization on your new Android.

## **Google Sync**

### ***What does Google Sync do?***

IXACT Contact's Google Sync service allows you to easily synchronize your IXACT Contact contact list and calendar with your Gmail contacts and Google calendar.



*If you are a member of a team you can sync your calendar, but only the Team Leader can sync the team contact list.*

Synchronization works in both directions – this means that any changes you make in IXACT Contact are automatically updated in Google, while changes made in your Google applications are automatically updated to IXACT Contact.

**Note** Google Sync does not include email. You will continue to use your existing Gmail email account and send and receive email the same way you do today.

Google Sync does not sync your IXACT Contact task list.



### **Wireless synchronization or Google Sync?**

With IXACT Contact, you can either synchronize directly with your wireless device, or you can synchronize your Gmail contacts and your Google calendar.

If you already use Gmail and Google Calendar, we recommend setting up Google Sync. If you also synchronize your wireless device with Google, this will establish a 3-way sync between IXACT Contact, Google and your wireless device.

If you do not use Gmail or Google Calendar, then you can set up [Wireless Synchronization](#) in order to sync IXACT Contact with your wireless device.

For further guidance on whether you should set up Wireless Synchronization or

Google Sync, please call customer support at 1-866-265-6990.



#### Important notes about Google Sync:

- Google Sync supports up to three email addresses only per contact. **If you have more than three email addresses entered for a contact in Google, the additional email addresses will be deleted.**
- Contact phone numbers in Google with a type of 'Google Voice', 'Main', or a custom type that does not match an IXACT phone type will not sync to IXACT Contact.
- Addresses in Google with a type other than Home or Work will not sync to IXACT Contact.
- If you have contacts in Google with more than one address with a type of Home or Work, only one will be synced to IXACT Contact.
- **In order to ensure that addresses entered in Google properly sync to the corresponding IXACT Contact individual address fields, please ensure that you always enter or update addresses in Google by clicking ... to the right of the address.**
- Contact wedding anniversary dates entered in IXACT Contact without a year will appear in Google as 1900.
- **If you need to restore deleted contacts, you should always do so in IXACT Contact (see [Using the Recycle Bin](#)) and not in Google.** This will ensure that all of your contact information is restored.
- Upon initial sync, calendar appointments that are more than three months old are not synced.

Before setting up Google Sync, we strongly recommend that you backup your Google contacts and calendar. For step-by-step instructions on backing up your contacts, click [here](#). For step-by-step instructions on backing up your calendar, click [here](#).

**Note** In order to start the setup of Google, you will first need to call our Customer Support department at 1-866-265-6990, so that we can confirm that Google Sync is the right synchronization for you, and enable your Google Sync option.

To set up Google Sync:

1. Click **User Profile** in the secondary menu (top right of your screen).
2. Under the Synchronization Services section, click **Set Up Google Sync**.
3. Make sure you have backed up your Google contacts and calendar, and click **Yes** to continue.
4. Choose the Google account that you wish to sync with (and sign in to your Google account if required).
5. Click **Accept** in order to grant IXACT Contact permission to access and manage your Google data.
6. Indicate whether you want to sync your Google contacts, and whether you want new Google contacts to be automatically added to your IXACT Contact contact list. If you do not select the auto-accept option, new contacts synchronized from Google will initially appear in the Imported and Synchronized Contacts list in the Utilities area.



*Only the Team Leader can sync the team contact list.*

7. Indicate whether you want to sync your Google calendar, and, if you have multiple Google calendars, select the calendar you want to sync.
8. Click **Save**.

Once you have completed the setup, the Synchronization Services section of the User Profile page will update to display the Google account you are syncing with, and the last time the sync completed. Until the sync completes for the first time, the last time the sync completed will read "Sync Pending".

**Note** New contacts added from Google during the *initial sync* are never automatically added to your contact list, even if you selected the auto-accept option. This allows you to account for any duplicate contacts that may exist in both Google and IXACT Contact when you first set up Google Sync. **Any contacts that you reject in IXACT will be deleted from Google during the next sync.** For instructions on processing these contacts, see [Processing Imported or Synchronized Contacts](#).

Depending on the number of contacts you have in Google, the *initial sync* may take some time to complete. To ensure that all your contacts synchronize properly, please do not process the synchronized contacts in the **Utilities** area *Imported and Synchronized Contacts* list until the initial sync has completed.

The sync will run automatically every two hours to keep your IXACT Contact and Google information in sync. However, you can click the **Sync Now** link at any time in order to immediately run the sync. The sync can take some time to complete depending on the number of changes you have made to your information in both IXACT Contact and Google.

**Note** Upon syncing your contacts, if you have selected the auto-accept option, changes you have made to your contacts in Google may not be immediately reflected in the Contacts list in the left column. Click the **Refresh Contact List** link in order to ensure that this list is up-to-date.

You can click the **Change Google Sync Settings** link in order to change your settings.

## Recycle Bin

### Using the Recycle Bin

When you delete a contact, a contact's property, an active business listing, or a Keep In Touch event, it is removed from the related list and stored in the IXACT Contact Recycle Bin just in case you need to restore it at a later date.

### Viewing items in the recycle bin

Click the **Recycle Bin** icon in the secondary menu (top right of your screen).

Deleted items are listed in the appropriate tabs with the most recently deleted items displayed at the top of the list.



*If you are a member of a team and the Team Leader has not granted you permission to delete contacts, then the Recycle Bin Contacts tab will not be visible to you.*

### Restoring a deleted item

Click **Restore** beside the item. You are prompted to confirm, then it is returned to the list it came from originally (e.g. the Contacts List, the contact's Properties tab, the Active Business screen, or the Keep In Touch screen).

**Note** A contact's properties, active business listings or contact-specific Keep In Touch events may be deleted independently (and restored separately in the Recycle Bin). However, if an entire contact record is deleted, any properties, active business listings or contact-specific Keep In Touch events do not display in the Recycle Bin and cannot be restored independently. If the contact is restored, all related contact information is restored at the same time.

### Mass restoring contacts

If necessary, you can mass restore up to 100 contacts at a time. To restore more than one contact, either select the check box next to each contact you wish to restore, or use the Select All check box at the top of the list. Then click **Mass Restore**.

### Permanently deleting an item

To permanently delete an item, click the **Delete** icon beside the item in the Recycle Bin. You are prompted to confirm, then it is deleted permanently.

The item cannot be restored. If you need it in the future; you will need to recreate the record.

**Note** Deleted items in your Recycle Bin will automatically be permanently deleted six months after being moved to your Recycle Bin.

## Working in Teams

### About Teams

The IXACT Contact Teams version is capable of supporting the needs of real estate teams of all sizes and types.

All of the marketing and business-related activities that are managed within IXACT Contact can be assigned to specific team members. And all contact and listing activity history includes visibility to the member of the team that carried it out.

Each member of a team gets their own calendar and task list that they can synchronize with their own wireless device.

Each team member can set up their own personalized branding, and all communications can be either individually branded, or use team branding.

All activity and transaction-related reports can be generated for a selected team member.

Except for contacts, the calendar and task list, all data in your IXACT Contact team account is shared by all team members. This includes email and letter templates, activity plans, Keep in Touch events, custom lists, etc.

As the Team Leader, you have the option to control the visibility of team members to individual contacts. You can also grant "Administrator" permissions to any team member, which grants them visibility to all contacts. You can also set any individual contact to "Public", which makes the contact visible to all team members.

As the Team Leader you also have the option to protect your contact data by restricting other team members from importing, deleting or exporting your contact records. You can also de-authorize a team member from accessing your account at any time.

### Creating a Team

Any IXACT Contact individual user account can be converted to a team account at any time. The account holder who creates the team account is referred to as the Team Leader, and is responsible for authorizing and managing all team members.

To create a team account:

1. Click **User Profile** in the secondary menu (top right of your screen).
2. In the Account Tasks section, click **Create Team**.
3. Enter a Team ID and Password.

**Note** Your Team ID and password will be used by new team members to join your team when they sign up for IXACT Contact. Be sure to make a note of the password for future reference.

4. Click **Create Team**.

As soon as you create your team, you will notice that your Team ID replaces the Create Team link, and there are new **Manage Team Members**, **Change Team Password**, and **Change Team Name** links available to you.

You can change your team password at any time by clicking the Change Team Password link and entering a new password.

You can change your team name at any time by clicking the Change Team Name link and entering a new team name.

**Note** Changing your team name or password has no effect on existing members of your team. Your team name and password is only used to join your team during signup. Team members use their own user ID and password to login to IXACT Contact after joining your team.

There are many other changes that you will notice throughout the system that enable the teams functionality. You can now invite people to [join your team](#) account.

## Joining a Team

Once the Team Leader has created a team, they can invite other members of their team to join.

Team members can only join a team during the IXACT Contact signup process. The Team Leader must provide each team member with the Team ID and password, and direct them to our signup page at <https://signup.ixactcontact.com>.

**Note** Team members with an existing IXACT Contact account cannot merge their account with a team account. If you wish to join a team, you will need to cancel your existing account, and then join the team as described below. If you wish to join a team using the same email address assigned to your existing account, you will need to have our Customer Support Team change the email address on your existing account upon cancelling it. While you cannot merge your existing data with the team account, if authorized by your Team Leader, you can export your contacts prior to cancelling your existing account, and then arrange with your Team Leader to have someone in our Customer Support Team import your contacts into the team account.

## Joining a team

1. In **Step 1** of the signup process, select the check box labeled 'I am joining an existing IXACT Contact team'.
2. Enter the **Team ID** and **Password** provided by the Team Leader.
3. Complete the remainder of the signup process.

Upon completion of the signup process, the Team Leader will receive an email notifying them that someone has signed up to join their team. *Be assured that nobody can access a team account without first being authorized by the Team Leader.*

## Authorizing a new team member

**Note** If you receive an email notification of someone who you do not wish to join your team, no action is necessary. However, if you are concerned that people may be trying to join your team under false pretenses, you should change your team password immediately.

1. Click **User Profile** in the secondary menu (top right of your screen).

2. In the Account Tasks section, click **Manage Team Members**. The screen displays all users who have signed up to join the team.
3. Next to the new team member name in the list, select the check box under **Authorized?**  
**Note** You can de-authorize a team member at any time by clearing the check box under **Authorized?**. As soon as you do this, the team member will no longer be able to login to your team account.
4. You may grant the team member additional permissions related to the team contact list, such as exporting your contact list, importing contacts and/or deleting contacts.
5. You can grant the team member visibility to all contacts by making them an "Administrator".
6. Click **Save**.
7. Notify the team member that they can now login to the team account with the user ID and password provided in their welcome email.

### Sharing a Calendar or Task List

All members of a team, including the Team Leader, can choose whether or not they wish to share their Calendar and/or Task List. Sharing means that other team members have full visibility to your calendar and/or task list, including the ability to create new appointments and tasks, and edit or delete existing appointments and tasks.

**Note** If you are sharing your calendar and/or task list, you still have the option to create private appointments or tasks that are never visible to other team members.

#### **All team members are set to share their calendar and task list by default upon signing up.**

To turn off calendar and/or task list sharing:

1. Click **User Profile** in the secondary menu (top right of your screen).
2. Under the **Preferences** section, click **Calendar & Task List Sharing**.
3. Clear the desired check boxes.
4. Click **Save**.



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