GETTING STARTED WITH BOLDTRAIL

Agent Edition

Sellstate Powersuite with BoldTrail

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QUESTIONS?

BUSINESS HOURS

Monday - Friday

9:00 AM - 5:00 PM (EST)

RESPONSE TIME

We will make sure to get back to you as soon as possible. Your questions are important to us!

CONTACT METHOD

Our Operations Coordinator will be more than happy to answer any questions you may have. Please feel free to reach out. We are here to support you.

Phone: (239) 437-3777
Email: operations@sellstate.com

LET'S KEEP IN TOUCH!

GETTING STARTED

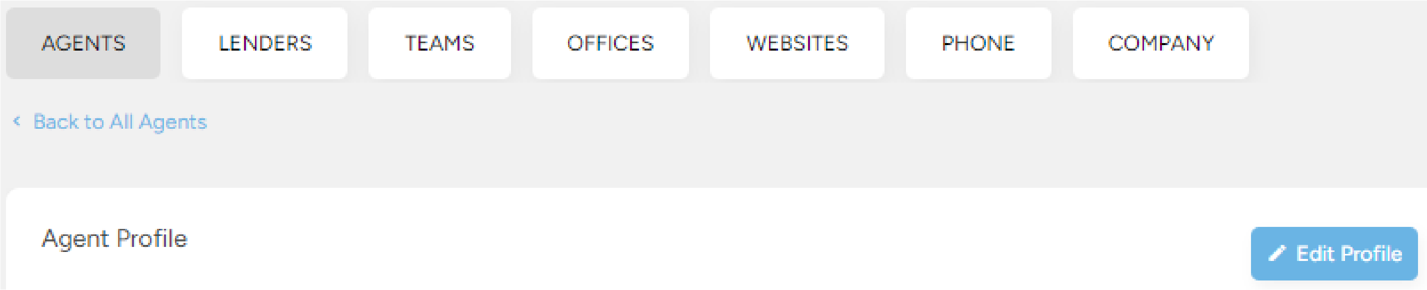
In order to get started on BoldTrail, you will need to login to your email that you provided to your Broker. Find the email that says "Welcome to BoldTrail - Congrats! You've just gained access to the greatest real estate..."

1. Click on the link provided in the email
2. You will see your login credentials:
    a. Your email
    b. A temporary password provided by your Broker to login
3. A page will open up with a link to login to the Powersuite. Using the credentials provided in the email, login to your account and navigate to the settings in order to change your password.
4. We do NOT recommend keeping your password that was provided by your Broker because more than likely they are using that same password for other new agents onboarding.

SETTING UP YOUR PROFILE

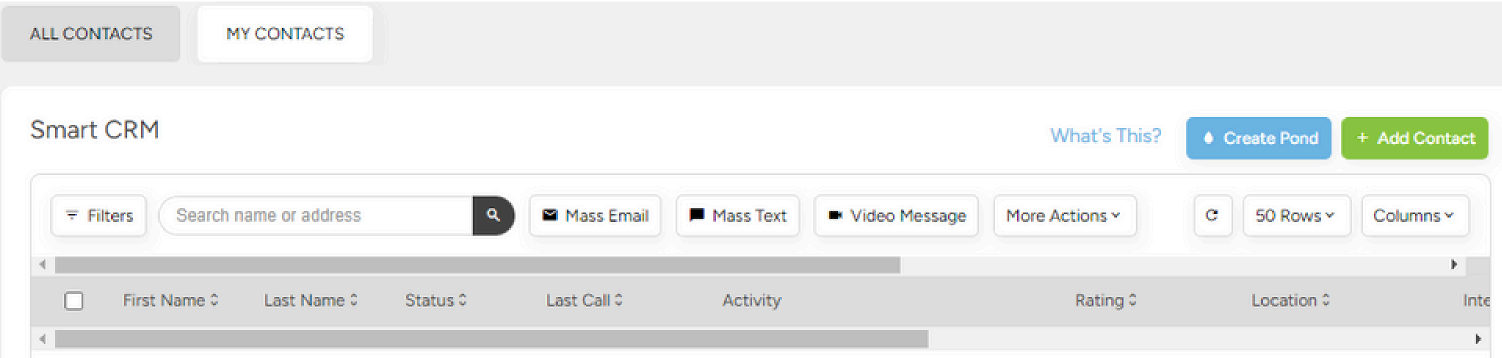
It is highly recommended to complete the Agent Quick Start Guide in order to learn the basic BoldTrail tools. This can be completed at: https://learn.insiderealestate.com/courses/aqs

1. Login to your Dashboard by going to login.sellstatepowersuite.com
2. Click on your name in the top right corner and click "My Profile"
3. Click "Edit Profile" to edit any information
    a. Tips:
        i. Upload a professional headshot for your picture
        ii. Make sure your contact information is correct
4. **Important:** Add your agent MLS ID because this is how BoldTrail will pull in your active listings to display on your website!
5. If you click on your name in the top right of your Dashboard, you'll see a phone number. This is your smart number. Never call this number since it's built for capturing new leads.

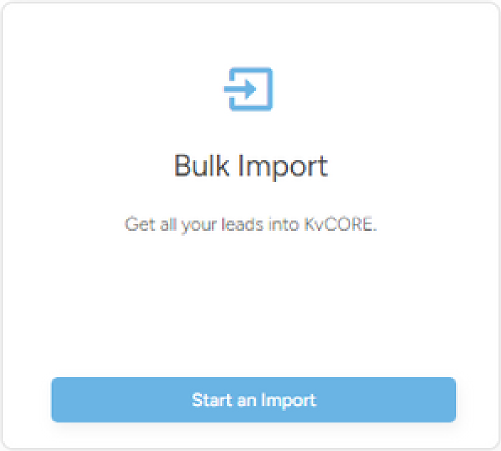


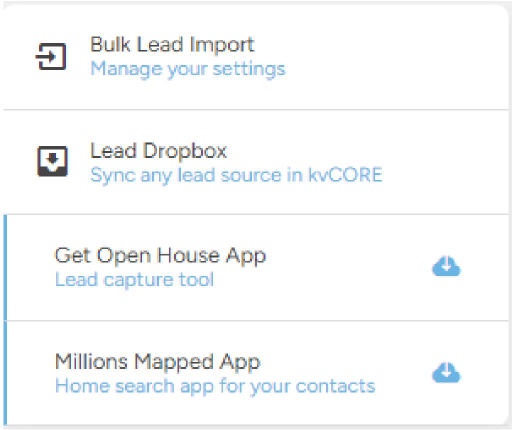
ADDING CONTACTS

Once you're logged into BoldTrail and on the main dashboard, hover your mouse over "Smart CRM". This is found on the menu bar to the left hand side. From there you'll select "All Contacts". You can now click the green button labeled "Add Contact". Also, if you're in a hurry, you can always select the blue "Quick Actions" button in the top right of the screen to add a contact.



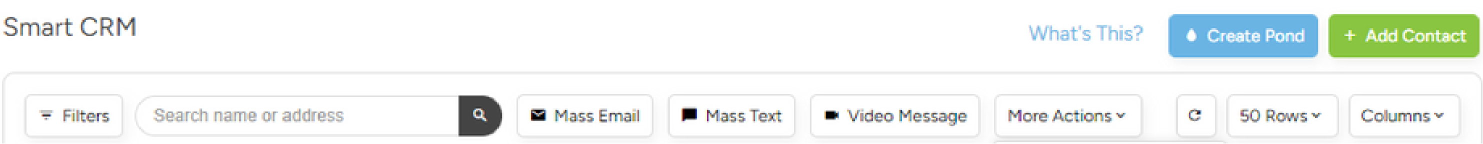
If you're looking to import contacts from an external source, select "Lead Engine" over on the menu bar to the left hand side. You can either select "Bulk Lead Import" in the top right of the screen or scroll down and select "Start an Import" under the Bulk Import square.





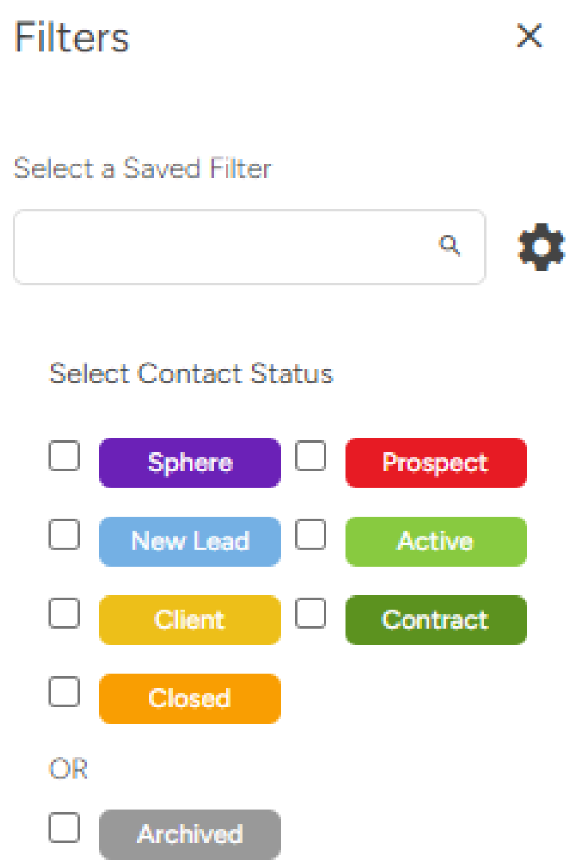
MANAGING CONTACTS

Once on your main dashboard, click on the “Smart CRM” tab on the left hand side. A table will appear with contacts. You can send mass emails, mass texts, video messages, and manage your leads with the buttons at the top of the table.



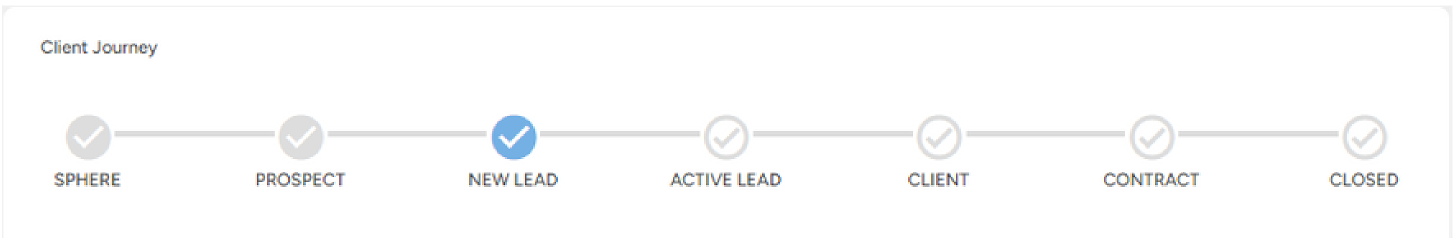
You can create an “Unengaged Leads” filter to check once a week which leads aren’t being regularaly communicated with.

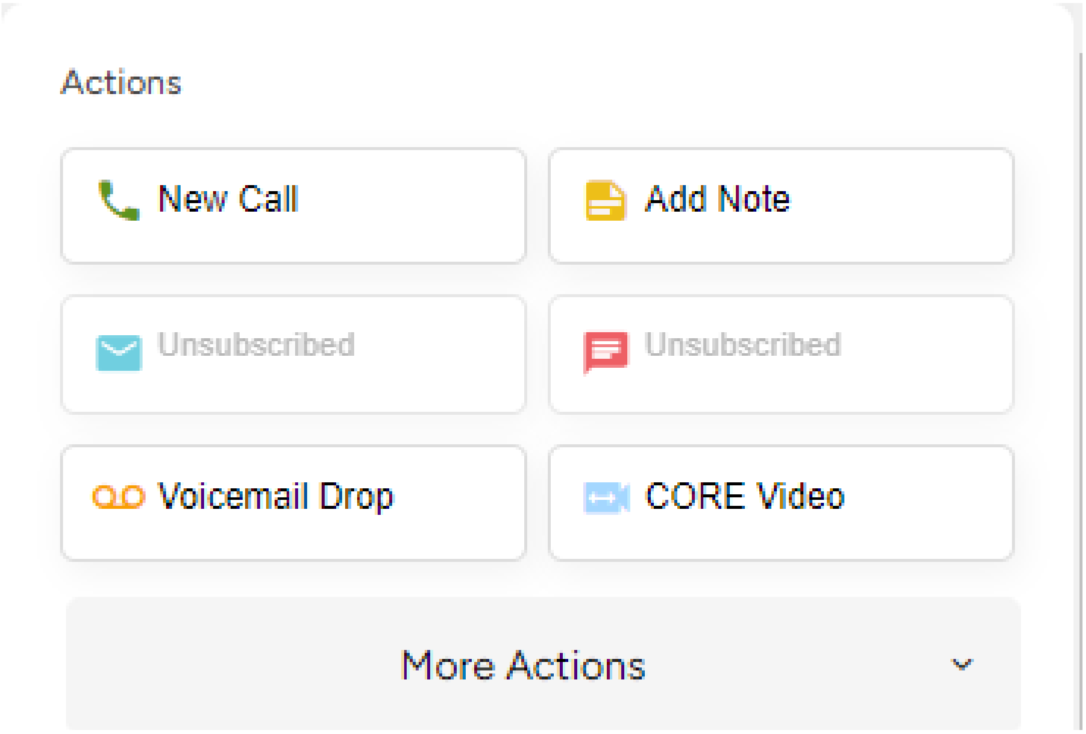
1. Under “Filters”, select Contact Status for:
    a. New Lead
    b. Prospect
    c. Active Lead
2. Add Filters under Behavior
    a. No Alerts
    b. Has No Market Reports
    c. Does Not Have a Running
3. Click “Save Filters”
4. Name it “Unengaged Leads”
5. Click “Save New Filter”
6. Click the gear icon to the left
7. Select the box for “Quick link on CRM”
8. Save



MANAGING CONTACTS

In your list on contacts, you can click on an individual's name to open their profile details. Here is where you can add them into active campaigns, select where they're at in their client journey, edit details, set alerts, add tasks, and create notes in their account.

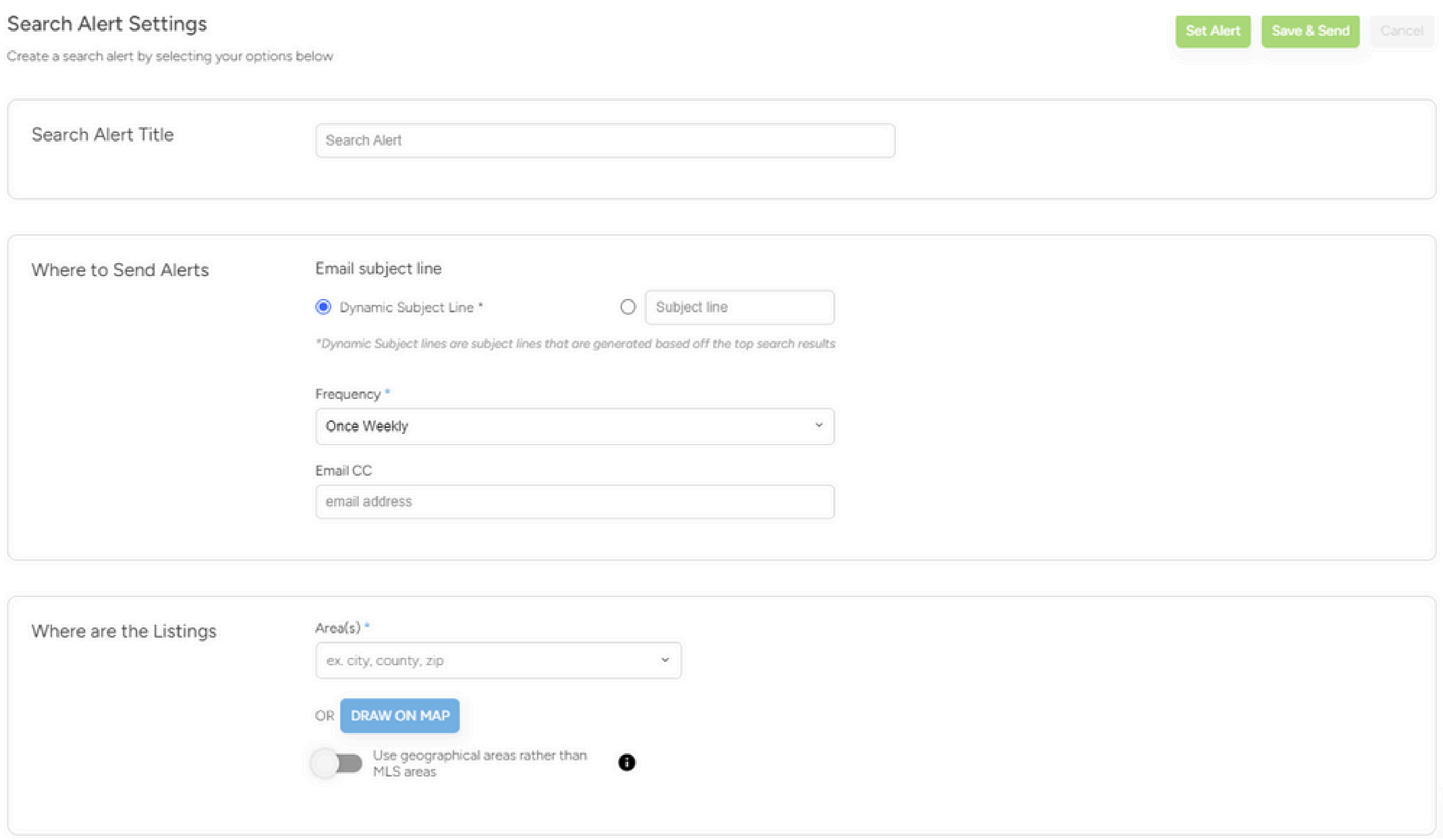




SEARCH ALERTS

Once on your main dashboard, click “Smart CRM’ in the bar to the left. From there you’ll select “All Contacts”.

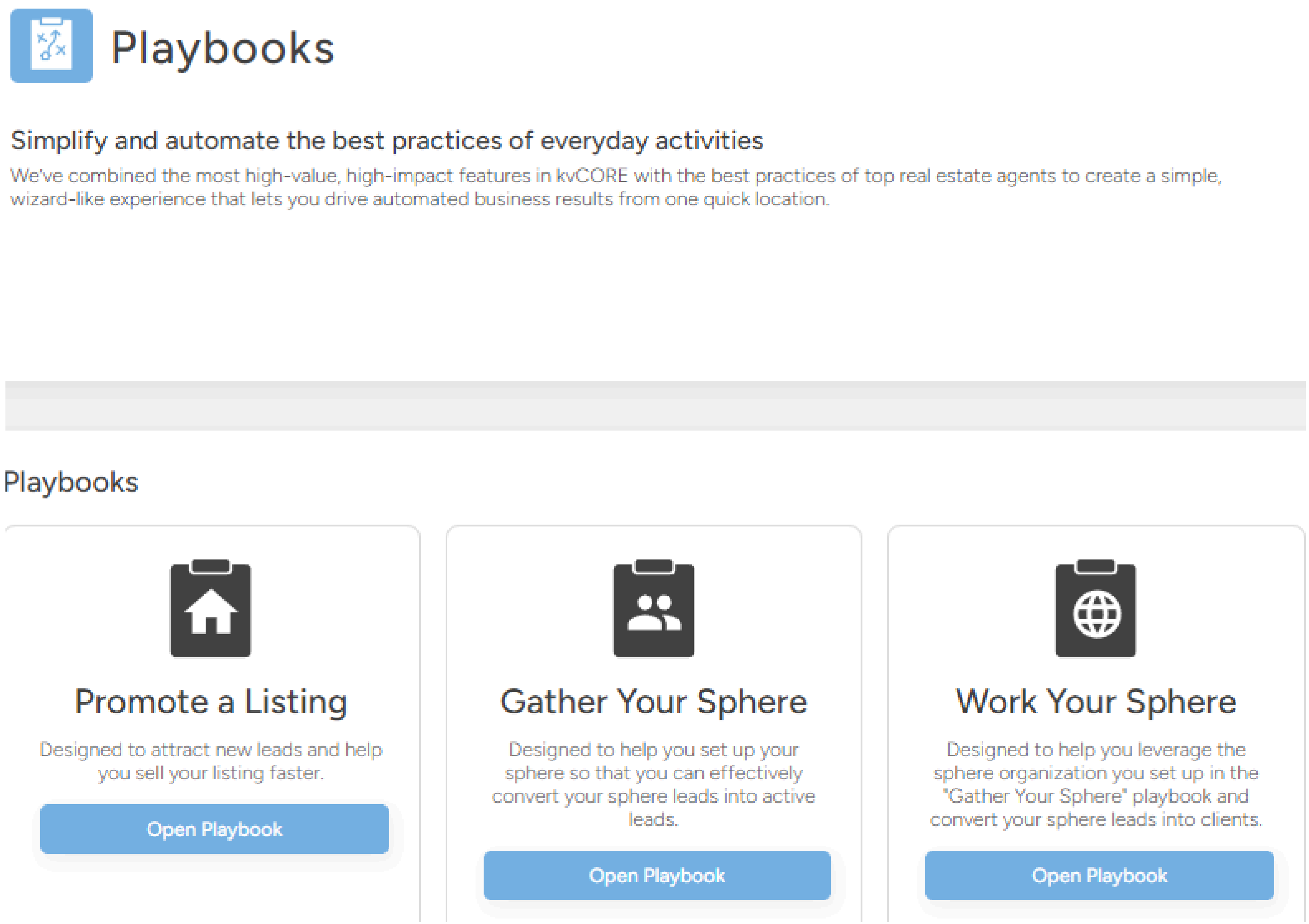
Next, you’ll select the lead you want to set up on a search alert. It will open up their profile details and you may click “Alerts” at the top. From here, you’ll fill in the information and make sure to click “Save and Send” at the very bottom to save the alert and send it out to the client.



PLAYBOOKS

Once on your main dashboard, click “Playbooks” in the bar to the left. This will open up your Playbook options. You can select any of the three options to get started.

You will then follow the instructions or videos to begin the playbook.

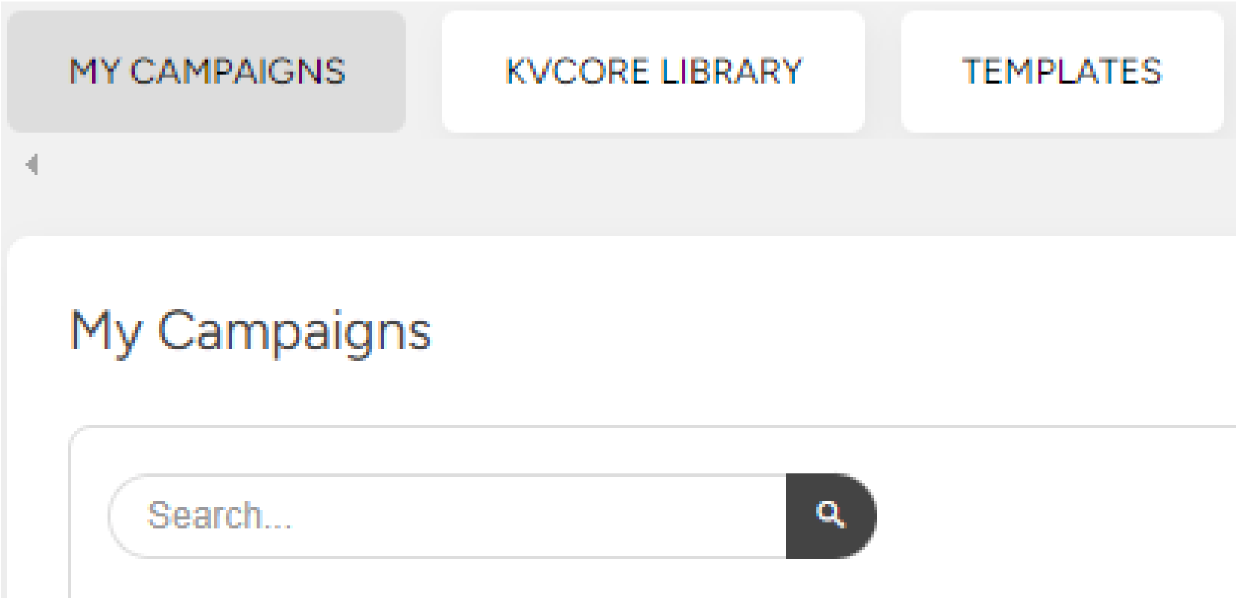


SMART CAMPAIGNS

Once on your main dashboard, click on “Smart Campaigns” under the Marketing tab in the bar to the left. There are 3 sections:

1. My Campaigns
   a. Any campaigns you created or were added from BoldTrail’s default selections
2. BoldTrail Library
   a. Contains premade campaigns
3. Templates
   a. Contains premade messages from the premade campaigns

You can assign a contact to a campaign by going into the contact record and clicking “Add” under “Active Campaigns”. Select a campaign. If it doesn’t appear in the list, make sure to toggle it to active. Be careful when adding more than 1 campaign so multiple messages don’t send at once.

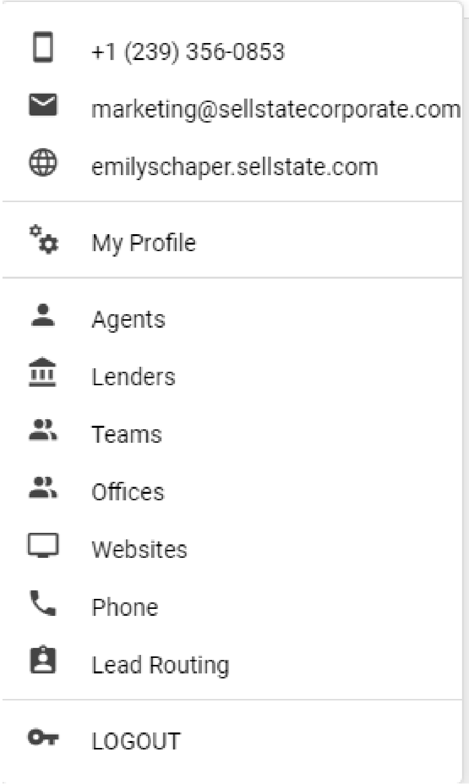


SMART NUMBER

Once on your main dashboard, click your name in the top right corner to open a drop down menu. You'll see a phone number listed at the top that is not your own number. This is called a smart number.

You do not call that number, it calls you. We highly recommend you add that number to your phone contacts because if it calls you, it's one of two things:

1. When you import your leads and any of those leads call that number on the office website, it routes back to you
2. It'll call you to let you know there's a new lead whenever someone signs up for more information on the website



Sellstate Powersuite with BoldTrail

YOU'RE READY!

Congratulations! You've completed all the sections in this guide! You are now set up on BoldTrail and know the basics.

To learn more, make sure to utilize the “Support & Training” section on the left menu on your dashboard. You’ll find courses, a webinar schedule, and much more.

Make sure to follow our Sellstate Powersuite Facebook page for BoldTrail tips/tricks! You can follow the page at https://www.facebook.com/sellstatepowersuite/