

TECHBRIEF CRM3 NAVIGATION CHANGES

We have made changes to the navigation in our CRM platform to improve usability and increase productivity. We have added and rearranged the location of some menu items. You will notice that some labeling has changed or shortened in preparation for making all of these pages responsive.

				Working As CM	Christine Markuson 💌
HOME - LEADS - LISTINGS - CLIENTS -	Marketing - Email - T	OOLS SITE BUILDER	RESOURCES	l	
HOME / COMPANY DASHBOARD					
Company Dashboard 👻					
Welcome If You're New to CRM3 Please Read Below Use the navigation buttons at the top of the page leads and contacts, drip marketing, website design,	to manage your and MLS listings.	 Search Resources Resources Apple Training 			
Your First Activity update your user information! Click the User tab (found at the top of the page). All user information. this information.	All this power at your fingertips	 Apple training Training 			

Leads

Leads is a new menu item and includes Manage, which used to be under Clients > Main, and Settings which used to be under User > Controls

				Working As CM	Christine Markuson 🔻
HOME - LEADS - LISTINGS - CLIENTS -	Marketing - Email - To	DOLS 🤟 SITE BUILDER 👻	RESOURCES		
HOME / COMP/ MANAGE					
Welcome If You're New to CR Please Read Belo Use the navigation buttons at the top of the p leads and contacts, drip marketing, website der	IM3 W age to manage your sign, and MLS listings.	Search Resources Resources Annle Training			
Your First Activity update your user information! Click the User tab (found at the top of the page). All user information. this information.	All this power at your fingertips	+ Training			



Listings

Listings is the same just the folders have abbreviated labels of Manage (Listing Manager), Manual (Demo & Manual Listings) and Reports (Listing Reports). We also moved Buyers Tour under Marketing.

We have a few label changes under Listings, Manage

• Listing Data is now Details | Seller Reports is now Reports | Property Placer is now Location

						Working As CM Christine Markuson
HOME - LEADS -	LISTINGS 👻 CLIENTS	- MARKETING -	EMAIL TOOLS	- SITE BUILDER -	RESOURCES	l
HOME / COMPANY DASHBOARD	MANAGE					
Company Dashboard 👻	MANUAL					
	REPORTS			Caral Decomposition		
Use leads	If You're New to Please Read Be the navigation buttons at the top of th s and contacts, drip marketing, website	CRM3 low e page to manage your design, and MLS listings.		Resources		
Your First Activity		All this power at yo	our fingertips	Apple Training		
update your user information!		000	+	Training		
Click the User tab (found at the top of user information for your website is g this information.	f the page). All generated from		GENERAL C			

Clients

Here you will see Message (Messages) and Notifications which was moved from under the User Profile Client Email Notification Settings. We have moved Campaigns, Postcards, and Flyers under Marketing. We moved Email/Letters under Email and we moved Calendar andTasks under Tools.

		1					Working As CM	Christine Markuson 💌
HOME LEADS LISTINGS	CLIENTS -	MARKETING 👻	email 👻		SITE BUILDER 👻	RESOURCES	ļ	
HOME / COMPANY DASHBOARD	CONTACT LIST							
Company Dashboard 🔻	GROUPS							
v	MESSAGE			I Sea	rch Resources			
If You'ı Pleas	NOTIFICATIONS			+ Dec				
Use the navigation buttons leads and contacts, drip ma	at the top of the page to rketing, website design, a	manage your nd MLS listings.		T Res	burces			
Your First Activity		All this power at	your fingertips	+ App	le Training			
update your user information!		1000	//	+ Trai	ning			
Click the User tab (found at the top of the page). All user information for your website is generated from this information.		A MAR MAR	Sept 20					

Marketing

Marketing is new and includes Campaigns (My Campaigns, Administrative Campaign Manager), Postcards, Flyers, and Buyers Tour.

					Working As CM	Christine Markuson 🔻
HOME - LEADS - LISTINGS - CLIENTS -	MARKETING 👻	Email 👻	TOOLS - SITE BUILDER	RESOURCES	l	
HOME / COMPANY DASHBOARD	CAMPAIGNS					
Company Dashboard 🔻	POSTCARDS					
Welcome	FLYERS					
If You're New to CRM	3 BUYERS TOUR		Search Resources			
Use the navigation buttons at the top of the pag- leads and contacts, drip marketing, website desig	e to manage your n, and MLS listings.		+ Resources			
Your First Activity	All this pow	er at your fingertips	+ Apple Training			
update your user information!	000	and the	+ Training			
Click the User tab (found at the top of the page). All user information for your website is generated from this information.		it nem in				



Email

This is new and includes what used to be under Email/Letters. Compose (Compose Email),Sent (Sent Email History), Letter Library which includes Create Letters and Admin Letter Library.

	Working As CM Christine Markuson 👻
HOME - LEADS - LISTINGS - CLIENTS - MARKETING -	EMAIL V TOOLS V SITE BUILDER V RESOURCES
HOME / COMPANY DASHBOARD	сомрозе
Company Dashboard 🔻	SENT
Welcome If You're New to CRM3 please Read Below Use the ravigation buttons at the top of the page to manage your leads and contacts, drip marketing, webbie design, and MLS listings.	LETTER LIBRARY Search Resources Resources
Your First Activity All this powe update your user information! Click the User tab (found at the top of the page). All user information for your website is generated from this information.	Apple Training Training Training

Tools

Tools is a new menu item that includes Calendar and Tasks (Scheduled, Create, Completed).

	Working As CM Christine Markuson 👻
HOME * LEADS * LISTINGS * CLIENTS * MARKETING * EMAIL	TOOLS SITE BUILDER RESOURCES
HOME / COMPANY DASHBOARD	MY CALENDAR
Company Dashboard 💌	TASKS »
Welcome If You're New to CRM3 Please Read Below Use the navigation buttons at the top of the page to manage your leads and contacts, drip marketing, webbait design, and MLS listings.	 Search Resources Resources
Your First Activity All this power at your fingertip update your user information! Click the User tab (found at the top of the page). All user information.	Apple Training Training

Site Builder

Site Builder is the same but the labels have been shortened or renamed.

- Under Content, Pages (Content Pages), Featured (Featured Properties), and Blog (My Blog).
- Under Design, Graphics (Image Library), Templates (Pre-packaged Designs), Layout (Homepage Layout), and Elements (Site Customization). Domain which used to be found under User is now located here.
- Under Search (Searches), you will find Manage (Manage Searches), Add (Add Searches), Map (My Search Map), and Client (My Client Saved Searches).
- Under SEO (SEO Manager), you will find Pages (SEO Pages), Search (SEO Search Page), Community (SEO Community Pages), Tracking (Tracking Codes), and Verification which is the same.
- Under Widgets, you will see Lead Form (Client/Leads), Search (Search Options), and Framed (Framed Search).
- Under Reports, you will see the Domain Entry Report which used to be under User, Domain.



Site Builder - continued

					Working As CM Chr	istine Markuson 🔻
Home - Leads - Listings - Clients -	Marketing - Email -	tools 👻	SITE BUILDER	RESOURCES	I	
HOME / COMPANY DASHBOARD			CONTENT	»		
Company Dashboard 💌			DESIGN	»		
Welcome			SEARCH	»		
If You're New to CRM3		🗶 Sea	SEO	»		
Use the navigation buttons at the top of the page to leads and contacts, drip marketing, website design, ar	manage your nd MLS listings.	+ Res	WIDGETS	»		
Your First Activity	All this power at your fingertips	+ App	REPORTS	»		
update your user information!	000	+ Trai				
Click the User tab (found at the top of the page). All user information for your website is generated from this information.		ā	VIEW WEBSITE			

Profile/Working As

You will now access your Profile and Signature (Email) by clicking the down arrow next to your name.

- Profile
 - Change your password at the Account Access Settings
 - Verify entries in the Account Information, Email, Phone Display, <u>Instant Acceptance</u>, Photo, Social Media, MLS ID, and Specialties sections
 - Click 'Submit Changes' below each section as needed
- Email Signature

	Working As CM	Christine Markuson 🔻
HOME V LEADS LISTINGS CLIENTS MARKETING EMAIL TOOLS SITE BUILDER RESOURCES		_Reliance Administrator ADMIN FUNCTIONS • Users • SB • Listings
Welcome If You're New to CRM3 please Read Below Welcome Use the navigation buttons at the top of the page to manage your leads and contacts, drip marketing, website design, and MLS listings. Your First Activity update your user information! Click the User tab (found at the top of the page). All user information.		Clients USER FUNCTIONS Profile Signature Sign Out

Notes

Please keep in mind that some navigation menu items are based on site options and yours may vary from what is mentioned here.

Example: If your company previously provided a direct link to a mail service, you can now find the link under Email as 'Web Mail'.

If you have questions specific to your configuration, contact your Reliance Network Account Manager.

