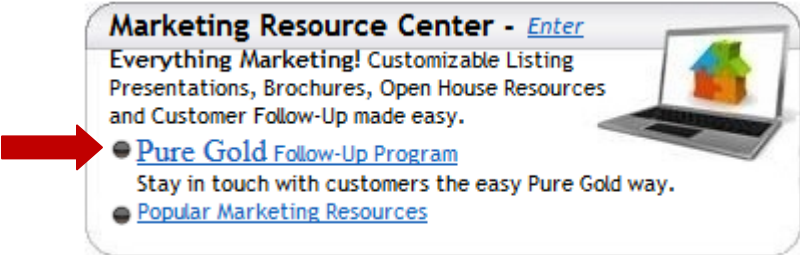
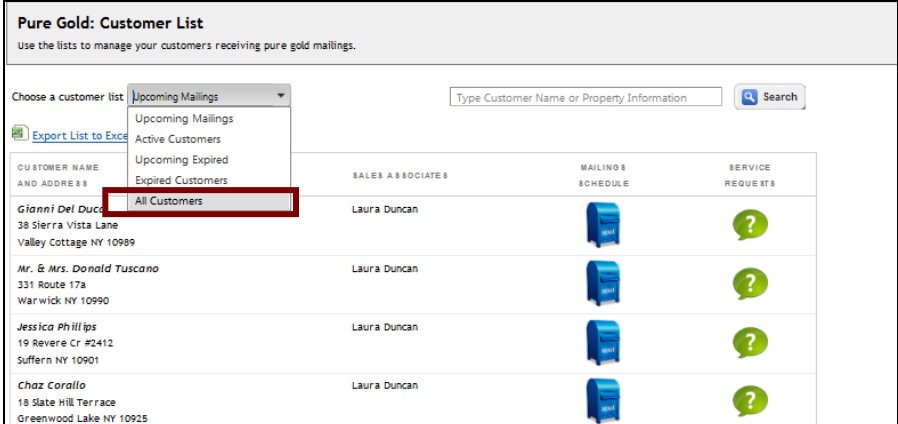
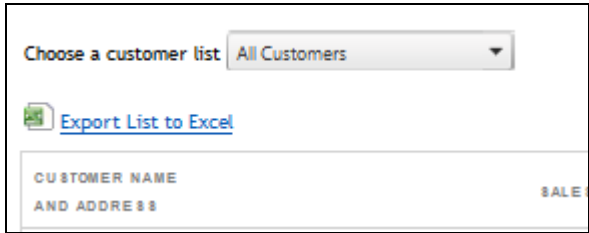
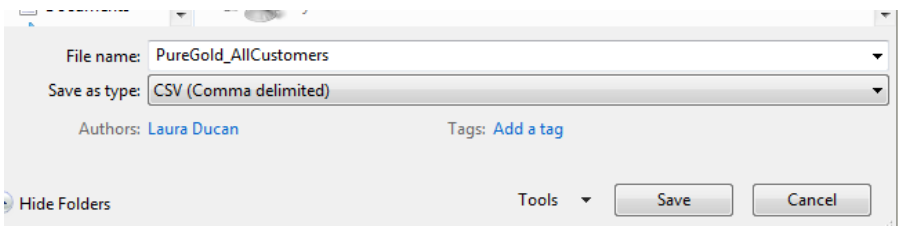


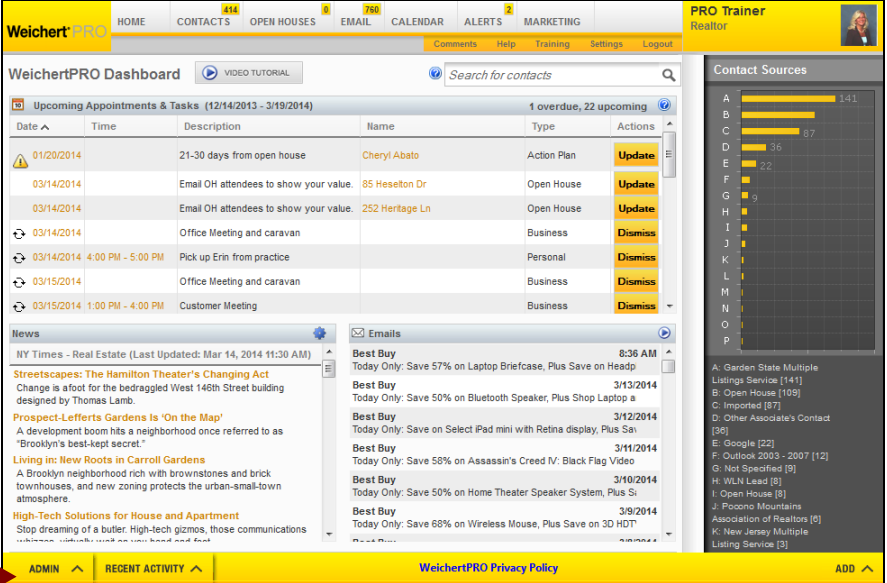

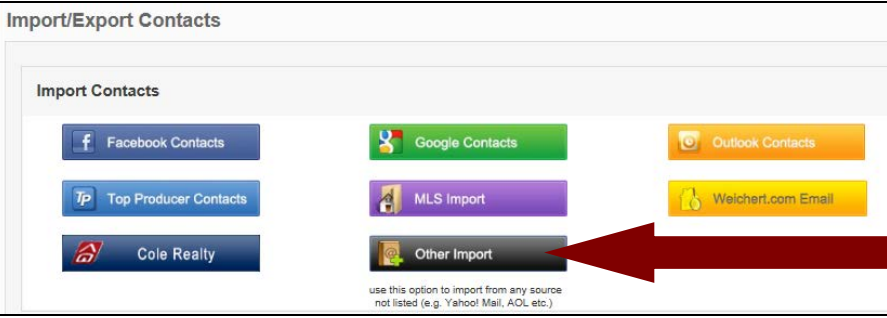
# WeichertPRO Job Aid – Importing Pure Gold Contacts from Weichertone.com

Importing your Pure Gold contacts into WeichertPRO will make it easier to stay in touch and ask them to refer you to their friends & family. Follow the instructions below to easily import your contact data, then schedule a plan for consistent follow up using your PRO calendar, Email templates and call lists. Reference the steps below:

## EXPORTING YOUR PURE GOLD CONTACTS:

Step	Screen																				
<ol style="list-style-type: none"> <li>Go To: <a href="http://www.weichertone.com">www.weichertone.com</a> and log in.</li> <li>Scroll down to the Market Resource Center section</li> <li>Click on Pure Gold Follow-up Program</li> </ol>	 <p>Marketing Resource Center - <a href="#">Enter</a>          Everything Marketing! Customizable Listing Presentations, Brochures, Open House Resources and Customer Follow-Up made easy.          ● <a href="#">Pure Gold Follow-Up Program</a>          Stay in touch with customers the easy Pure Gold way.          ● <a href="#">Popular Marketing Resources</a></p>																				
<ol style="list-style-type: none"> <li>Select a Customer List from the drop down. Click on "All Customers"</li> </ol>	 <p>Pure Gold: Customer List          Use the lists to manage your customers receiving pure gold mailings.</p> <p>Choose a customer list: <span>Upcoming Mailings</span> <input type="text" value="Type Customer Name or Property Information"/> <input type="button" value="Search"/></p> <ul style="list-style-type: none"> <li>Upcoming Mailings</li> <li>Active Customers</li> <li>Upcoming Expired</li> <li>Expired Customers</li> <li><b>All Customers</b></li> </ul> <table border="1"> <thead> <tr> <th>CUSTOMER NAME AND ADDRESS</th> <th>SALES ASSOCIATE</th> <th>MAILING SCHEDULE</th> <th>SERVICE REQUESTS</th> </tr> </thead> <tbody> <tr> <td>Gianni Del Duca 38 Sierra Vista Lane Valley Cottage NY 10989</td> <td>Laura Duncan</td> <td></td> <td></td> </tr> <tr> <td>Mr. &amp; Mrs. Donald Tuscano 331 Route 17a Warwick NY 10990</td> <td>Laura Duncan</td> <td></td> <td></td> </tr> <tr> <td>Jessica Phillips 19 Revere Cr #2412 Suffern NY 10901</td> <td>Laura Duncan</td> <td></td> <td></td> </tr> <tr> <td>Chaz Corallo 18 Slate Hill Terrace Greenwood Lake NY 10925</td> <td>Laura Duncan</td> <td></td> <td></td> </tr> </tbody> </table>	CUSTOMER NAME AND ADDRESS	SALES ASSOCIATE	MAILING SCHEDULE	SERVICE REQUESTS	Gianni Del Duca 38 Sierra Vista Lane Valley Cottage NY 10989	Laura Duncan			Mr. & Mrs. Donald Tuscano 331 Route 17a Warwick NY 10990	Laura Duncan			Jessica Phillips 19 Revere Cr #2412 Suffern NY 10901	Laura Duncan			Chaz Corallo 18 Slate Hill Terrace Greenwood Lake NY 10925	Laura Duncan		
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<ol style="list-style-type: none"> <li>Click on the link to Export List to Excel</li> </ol> <p>You will be given the option to Open or Save the file.</p>	 <p>Choose a customer list: <span>All Customers</span></p> <p> <a href="#">Export List to Excel</a></p> <p>CUSTOMER NAME AND ADDRESS <span>SAVE</span></p>																				
<ol style="list-style-type: none"> <li>Save the file to a convenient place on your computer where you can find it easily. Save it as a CSV File. (Some sources will default to an "Excel Worksheet" with extension .xls)</li> </ol>	 <p>File name: <span>PureGold_AllCustomers</span></p> <p>Save as type: <span>CSV (Comma delimited)</span></p> <p>Authors: <span>Laura Duncan</span> Tags: <span>Add a tag</span></p> <p>Hide Folders <span>Tools</span> <input type="button" value="Save"/> <input type="button" value="Cancel"/></p>																				

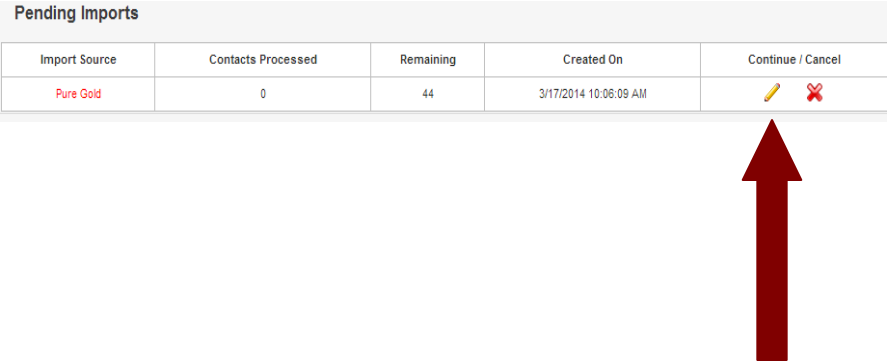
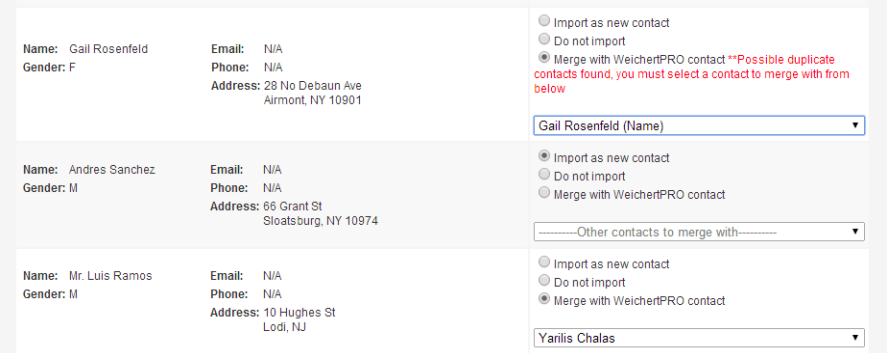
# WeichertPRO Job Aid – Importing Pure Gold Contacts from Weichertone.com

Step	Screen
<p>1. Go to:  <a href="http://www.weichertpro.com">www.weichertpro.com</a> and log in</p> <p>2. Click Admin</p>	 <p>The screenshot shows the WeichertPRO Dashboard. At the top, there are navigation tabs for HOME, CONTACTS (414), OPEN HOUSES (8), EMAIL (760), CALENDAR, ALERTS, and MARKETING. Below this is a search bar and a table of 'Upcoming Appointments &amp; Tasks' for the period 12/14/2013 - 3/19/2014. The table has columns for Date, Time, Description, Name, Type, and Actions. A red arrow points to the 'ADMIN' link in the bottom navigation bar.</p>
<p>3. Select "Import/Export Contacts" from the pop-up window.</p>	 <p>The screenshot shows a vertical menu under the 'Admin' header. The options are: Action Plan Management, Group Management, Library Content Management, Library Templates, Google, Import/Export Contacts, and WLN Lead Specialist Certificate. A red arrow points to the 'Import/Export Contacts' option.</p>
<p>4. Select "Other Import".</p> <p>You will use this option for any Source that is not listed here.</p>	 <p>The screenshot shows the 'Import/Export Contacts' page. Under the 'Import Contacts' section, there are several buttons: Facebook Contacts, Top Producer Contacts, Cole Realty, Google Contacts, MLS Import, and Other Import. A red arrow points to the 'Other Import' button. Below the buttons, there is a note: 'use this option to import from any source not listed (e.g. Yahoo! Mail, AOL, etc.)'.</p>

# WeichertPRO Job Aid – Importing Pure Gold Contacts from Weichertone.com

Step	Screen
<p>5. Review the instructions and click "Continue". Use the "Browse" button, to find your Pure Gold Contact file and upload it.</p>	<p>This page will allow you to upload your export from a different application. Once you upload the file, you will be shown the records that were scanned, at which point you can choose which contacts you want to add to your contact list. <i>Allowed File Extensions and File Sizes: .csv - 15MB</i></p> <p><input type="text"/> <input type="button" value="Browse"/></p> <p>se which contacts you want to add to your contact list. <i>Allowed File Extensions and File Sizes: .csv -</i></p> <p><input checked="" type="radio"/> PureGold_AllCustomers.csv <input type="button" value="Remove"/></p>
<p>6. Review the instructions for mapping your data fields to matching WeichertPRO data fields. Name your Mapping. This name will be the "Source" tied to your contacts</p>	<p><input type="radio"/> Select Previously Saved Mapping <input checked="" type="radio"/> Create New Mapping</p> <p>Mapping Name <input type="text" value="Pure Gold"/> <span style="color: red;">(Required) T contacts be</span></p>
<p>7. Select the PRO field name from the drop down box that best describes the data shown in "Your Field Name" When you have completed mapping all the fields, click "Continue".</p>	<p>Our Field Names</p> <p>Notes</p> <ul style="list-style-type: none"> <li>Ignore This Field</li> <li>Full Name</li> <li>▶ Name Parts</li> <li>Gender</li> <li>Company</li> <li>▶ Contact Info</li> <li>Contact Type (e.g., Buyer, Seller, Renter)</li> <li>Contact Group</li> <li>▶ Primary Address</li> </ul>

# WeichertPRO Job Aid – Importing Pure Gold Contacts from Weichertone.com

Step	Screen
<p><b>8. When your import file has finished processing, click the Edit Icon to review your data.</b></p> <p><i>Hint: You will receive an alert when the process is completed. Then go back to the Import page to continue.</i></p>	
<p><b>9. Review your list and select one of the Import options for each of your contacts. (Import, Merge or Do Not Import). Click "Import".</b></p>	
<p><b>10. Click "View Contacts" You can now filter your contacts by "Source" (Pure Gold) and edit them.</b></p> <p><i>Hint: Add their email addresses and add them to a group with a consistent follow up action plan</i></p>	