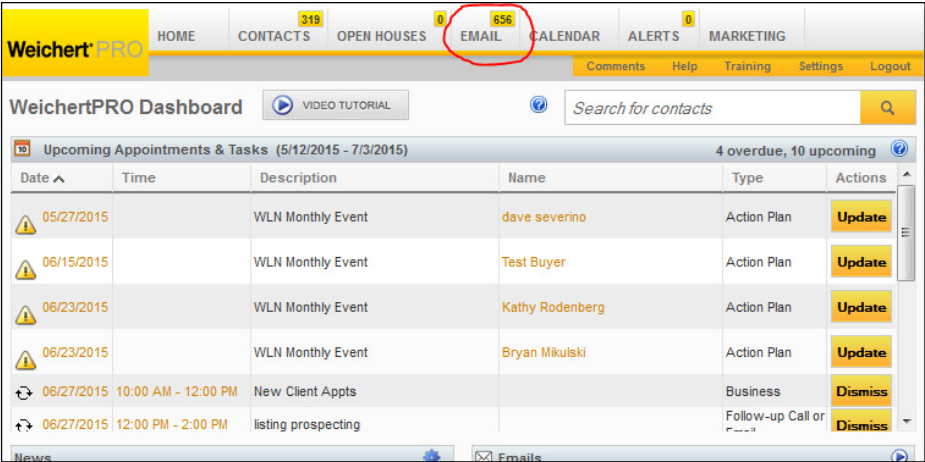

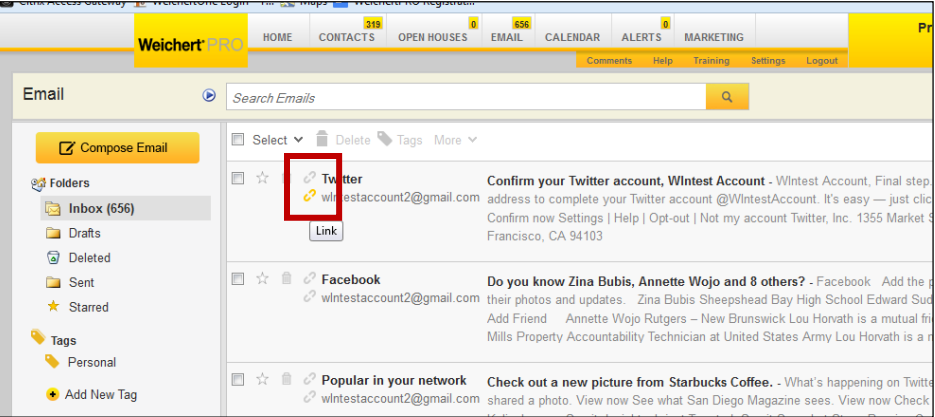
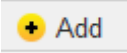
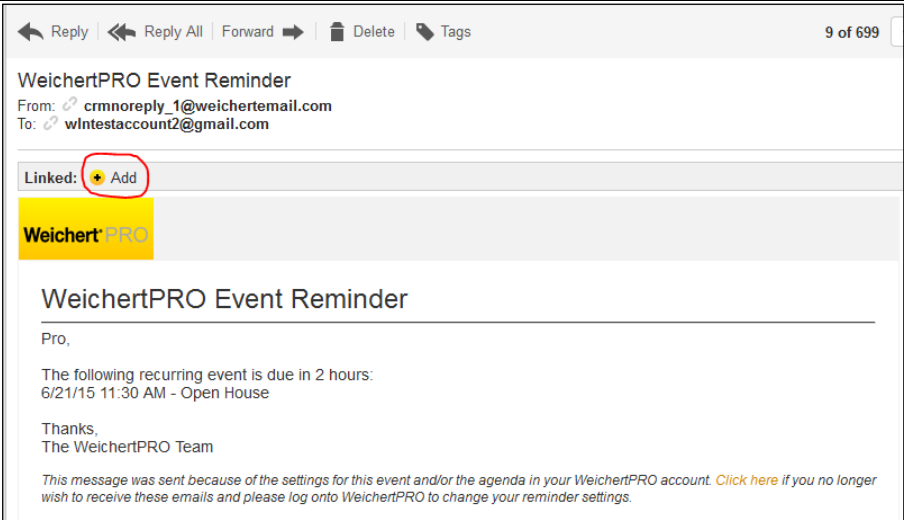
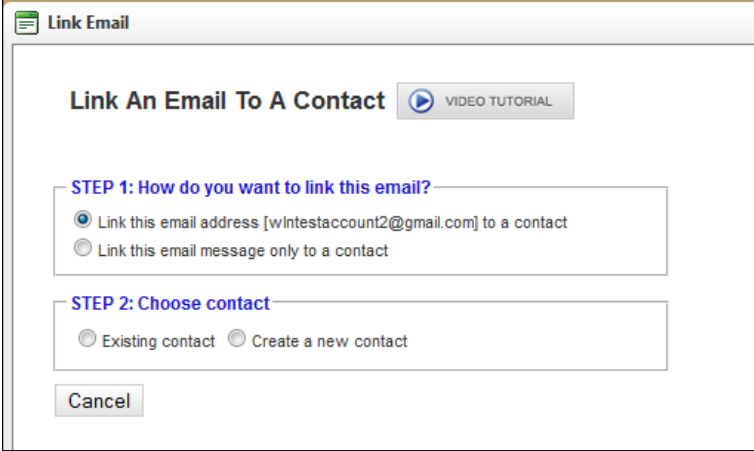
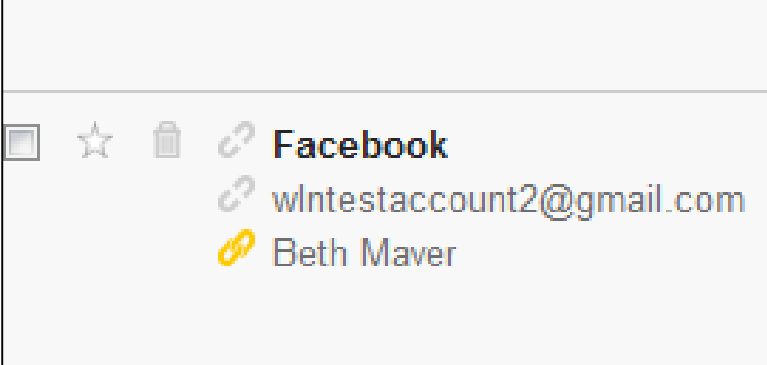


# WeichertPRO Job Aid: Linking eMails, eMail Messages and Contacts

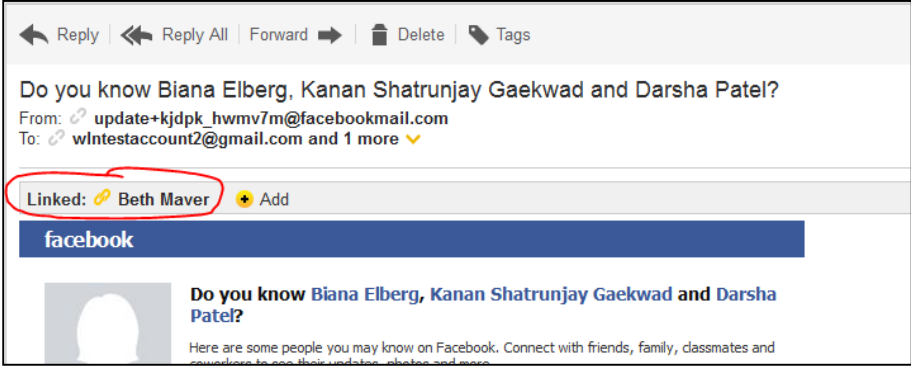
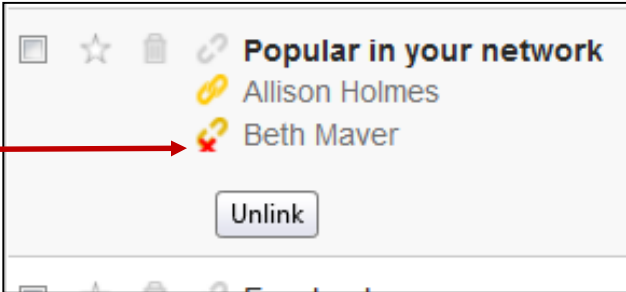
## Linking Emails and Contacts

Step	Screen
<p data-bbox="94 325 545 363"><b>Linking Emails and Contacts</b></p> <p data-bbox="94 396 545 756">WeichertPRO email lets you link an email address to a contact so you can automatically keep every email related to a contact or a transaction in one place. You can also link a specific email message to a contact. This is useful when you have an email from another party (i.e. , lawyer representing your client) relating to a transaction</p> <ol data-bbox="94 789 545 919" style="list-style-type: none"><li>1. Go To: <a href="http://www.weichertpro.com">www.weichertpro.com</a> and log in</li><li>2. Click <b>Email</b></li></ol>	 <p>The screenshot shows the WeichertPRO Dashboard. The top navigation bar includes 'HOME', 'CONTACTS' (319), 'OPEN HOUSES' (0), 'EMAIL' (656), 'CALENDAR', 'ALERTS' (0), and 'MARKETING'. The 'EMAIL' menu item is circled in red. Below the navigation bar, there is a search bar for contacts and a table of 'Upcoming Appointments &amp; Tasks' for the period 5/12/2015 - 7/3/2015. The table has columns for Date, Time, Description, Name, Type, and Actions. Several rows are visible, including 'WLN Monthly Event' and 'New Client Appts'.</p>
<p data-bbox="94 1031 493 1102"><b>How to link an email to a contact</b></p> <p data-bbox="94 1136 324 1167"><b>From your inbox:</b></p> <p data-bbox="94 1171 540 1232">Click the Gray outline link icon next to the sender's name.</p> 	 <p>The screenshot shows an email inbox interface. The top navigation bar is similar to the previous screenshot. The main content area shows a list of emails. The first email is from 'Twitter' with the subject 'Confirm your Twitter account, WIntest Account'. A red box highlights the 'Link' button next to the sender's name 'wintestaccount2@gmail.com'. Other emails from 'Facebook' and 'Popular in your network' are also visible.</p>

# WeichertPRO Job Aid: Linking eMails, eMail Messages and Contacts

Step	Screen
<p><b>While reading a message:</b> Click the <b>Add icon</b> next to the word 'Linked' at the top of the email just below the To/From section.</p> 	 <p>The screenshot shows an email titled 'WeichertPRO Event Reminder'. At the top, there are navigation icons (Reply, Reply All, Forward, Delete, Tags) and a page indicator '9 of 699'. Below the header, the 'Linked:' label is followed by a yellow 'Add' button with a plus sign, which is circled in red. The email content includes a 'WeichertPRO' logo, the subject 'WeichertPRO Event Reminder', a salutation 'Pro,', and event details: 'The following recurring event is due in 2 hours: 6/21/15 11:30 AM - Open House'. It ends with 'Thanks, The WeichertPRO Team' and a footer note about email settings.</p>
<p>3. Link the <b>email address</b> to a contact or just a <b>single email message</b> to a contact.</p> <p>Link a <b>single email message</b> when you only want that particular email to be linked to a contact. An example is when you have a message from an attorney related to a specific transaction. When you link it to the contact in the transaction, it will also be saved to that contact's email folder for history purposes. This is similar to "foldering" in other email providers.</p> <p>4. Use Step 2 to <b>select the contact</b> you will be linking to or contact or create a new contact in WeichertPRO.</p> <p>Note: when linking an email address to a contact, this may take a few seconds to complete processing.</p>	 <p>The 'Link Email' dialog box has a title bar with a hamburger menu icon and the text 'Link Email'. Below the title bar, there is a section titled 'Link An Email To A Contact' with a 'VIDEO TUTORIAL' button. Underneath, there are two steps: 'STEP 1: How do you want to link this email?' with two radio button options: 'Link this email address [wintestaccount2@gmail.com] to a contact' (selected) and 'Link this email message only to a contact'. 'STEP 2: Choose contact' has two radio button options: 'Existing contact' (selected) and 'Create a new contact'. A 'Cancel' button is at the bottom.</p>
<p>When viewing the message from the email inbox or other folder, the link icon will now be yellow with the contact's name next to it.</p> 	 <p>The screenshot shows a list of items in an email interface. Each item has a small icon on the left: a square, a star, a trash can, and a yellow link icon. To the right of these icons are the names 'Facebook', 'wintestaccount2@gmail.com', and 'Beth Maver'.</p>

## WeichertPRO Job Aid: Linking eMails, eMail Messages and Contacts

Step	Screen
<p>When reading the message, the linked contact will be visible in the 'linked' section of the email.</p>	 A screenshot of an email interface. At the top, there are action buttons: Reply, Reply All, Forward, Delete, and Tags. The email subject is "Do you know Biana Elberg, Kanan Shatrunjay Gaekwad and Darsha Patel?". The sender is "update+kjdpk_hwmv7m@facebookmail.com" and the recipient is "wIntestaccount2@gmail.com and 1 more". Below the header, there is a section labeled "Linked:" with a yellow link icon next to the name "Beth Maver" and a plus sign with the word "Add". Below this is a blue bar with the word "facebook". At the bottom, there is a profile picture placeholder and the text "Do you know Biana Elberg, Kanan Shatrunjay Gaekwad and Darsha Patel?". A red circle highlights the "Beth Maver" link.
<p><b>Remove a link</b></p> <p>Hover your cursor over the yellow link icon and a red X will appear. Click the red X to remove the link.</p>	 A screenshot of the "Popular in your network" section in an email interface. It shows two names: "Allison Holmes" and "Beth Maver". Each name has a yellow link icon to its left. A red X is overlaid on the link icon for "Beth Maver". A red arrow points from the text in the "Step" column to this red X. Below the names is an "Unlink" button.

### Additional Resources:

- **For Technical Questions:** Call the Help Desk at 973-290-5722
- **Or email at:** [helpdesk@weichertrealtors.net](mailto:helpdesk@weichertrealtors.net)
- For additional WeichertPRO training and our a library of video tutorials visit: [www.weichertpro.com](http://www.weichertpro.com) → **Training**