

To Create a New Contact

• Click "Contacts" button in the Navigation Bar

| pinergy | Home | Contacts | Listings | Search | Cloud CMA | Tools | | | | |
|---|------|----------|----------|--------|------------|---------|--|--|--|--|
| Click the "New" button | | | | | | | | | | |
| Corporate Website System Recommendations | | | | | | | | | | |
| pinergy | Home | Contacts | Listings | Search | ි Cloud CM | A Tools | | | | |
| Image: Setting in the set of the set | | | | | | | | | | |

- Enter a First and Last Name (this can be seen by the Contact)
- Enter an Email Address

| Corporate Website Sys | stem Recommendation | ; | | | | We | lcome, Pinergy | Sign Out |
|---|-------------------------------|-------------------|------------------|------------------------------|---|-------------------------------|--------------------|------------------|
| pinergy H | lome Contac | s Listings | Search | | Tools | | | More - |
| Contacts > New (| Contact | | | | | | | |
| Activity Information | Searches Matches | History | | | | | | |
| 🕞 Save 📔 🖂 Email | Categories | ≪ Settings | | | | Download | BPrint | PDF |
| Contact ID: Working With: Password: Categories: Contact Name(s) | New Contact Pinergy Studen | Leave Blo | ink for Random F | Password (Password is Viewal | ele by Contacts) Enter the I name of yo | First and Last ur Contact. | | |
| Main Contact | ~ / | | | • (Fit: | st Name/Last Nan | e Required) (First Name/L | ast Name is Viewal | ole by Contacts) |
| Email(s) | Add Additional C | ontact Name | | 2. Receive Emails | Enter the E of your | Email Address Contact | | |
| | Add Additional E | mail | | | | | | |

• Click "Save" - then "Save"

| Corporate Website | System Rec | ommendations | | | | | | w | elcome, Pinergy | Sign Out |
|--------------------------|-------------|--|------------|----------------|---------------------------------|----------------|-------------------------|------------------------|----------------------|------------------|
| pinergy | Home | Contacts | Listings | Search | | MA | Tools | | | More - |
| Contacts > Ne | tion Search | t Matches | listory | "Save" v | will save your on | work this | and allow page. | you to remain | | |
| Save Save and Close | mail 📔 🔡 | Categories | Settings | "Save ar | nd Close" will back to the r | save main (| your work Contacts F | and bring you Page. | Print | PDF |
| Password: Categories: | | | Leave Blan | k for Random P | assword (Password is | Viewable | by Contacts) | | | |
| Contact Name(s) | | | | | | | | | | |
| Main Contact | ~ / | Niki | | Coburn | | • (First I | Name/Last Name | Required) (First Name, | /Last Name is Viewab | ele by Contacts) |
| Email(s) | Α | dd Additional Conta | ict Name | | | | | | | |
| Email | ~ [r A | ncoburn@mlspin.co dd Additional Email | m | | Receive Emails | | | | | |

NOTE: Use the "Add Additional Contact Name" and "Add Additional Email" options to enter up to 6 total names and 6 total email addresses to the record.

| Corporate Website | orporate Website System Recommendations Welcome, Pinergy Sign Out | | | | | | | | | | | |
|--|---|-----|------------------|----------|----------|------------------|----------|---------------|-----------------------|-------------------------|------------------|--|
| pinergy | Hom | e | Contacts | Listings | Search | ා <i>C</i> Cloud | СМА | Tools | | | More 🗸 | |
| Contacts > New Contact | | | | | | | | | | | | |
| Activity Information Searches Matches History | | | | | | | | | | | | |
| <mark></mark> | | | | | | | | | | | | |
| Contact ID: New Contact Working With: Pinergy Student Password: Image: Blank for Random Password (Password is Viewable by Contacts) Categories: Contact Name(s) | | | | | | | | | | | | |
| Main Contact | \sim | Þ | Niki | | Coburn | | • (First | Name/Last Nan | ne Required) (First N | ame/Last Name is Viewal | ble by Contacts) | |
| Spouse | ~ | | Joe | | Smith | | X Rem | nove | | | | |
| | | Add | Additional Conta | ct Name | | | | | | | | |
| Email(s) | | _ | | | | _ | | | | | | |
| Email | ~ | nco | burn@mlspin.co | m | <u></u> | Receive Emails | X Remo | ve | | | | |
| Email | ~ | jsm | ith@email.com | | 1 | Receive Emails | X Remo | ve | | | | |
| | | Add | Additional Email | | | | | | | | | |

Email Verification

The contacts you add will need to verify their email address before they start to receive email matches. Before the email address is verified you will see "Resend Verification Email" next to each email address. You can use this "Resend Verification Email" option to resend the email verification the contact needs.

Þ

| Contact Name(s) | | | | | | | 79 |
|-----------------|--------|------------|-------------------------|-------|------------------------|------------------------|--|
| Main Contact | \sim | Þ | Niki | Cobur | ı | • (First Name/Last Nam | e Required) (First Name/Last Name is Viewable by Contacts) |
| Spouse | ~ | P | Joe | Smith | | X Remove | |
| | | <u>Add</u> | Additional Contact Name | | | | |
| Email(s) | | | | | | | |
| Email | ~ | nco | burn@mlspin.com | | Resend Verification Er | mail 🗹 Receive Emails | X Remove |
| Email | ~ | jsm | nith@email.com | | Resend Verification Er | mail 🗹 Receive Emails | X Remove |
| | | Add | Additional Email | | | | |

Once the email address has been verified you will see "Verified" next to the email address.

| Contact Name(s) | | | | | | | |
|-----------------|---|-----|-------------------------|--------|---------------------|--|---------------------------------------|
| Main Contact | ~ | 1 | Niki | Coburr | 1 | • (First Name/Last Name Required) (First Nan | ne/Last Name is Viewable by Contacts) |
| Spouse | ~ | 1 | Joe | Smith | | X Remove | |
| | | Add | Additional Contact Name | | | | |
| Email(s) | | | | | | | |
| Email | ~ | nce | oburn@mlspin.com | | Verified Z Receiv | Emails X Remove | |
| Email | ~ | jsm | nith@email.com | | Resend Verification | imail 🗹 Receive Emails 🛛 🗙 Remove | |
| | | Add | Additional Email | | | | |

To add a Search to your Contact from the Contact section of Pinergy

- From the Searches Tab within the Contact Record
- Click the New Contact Search

| Corporate Website System Recommendations | | | | | | | | | | |
|--|-----------|------------|--------------|---------------|--------------|------------|--------|--|--|--|
| pinergy | Home | Contacts | Listings | Search | C lou | d CMA | Tools | | | |
| <u>Contacts</u> > Niki Coburn | | | | | | | | | | |
| Activity Informati | on Search | es Matches | History | | | | | | | |
| New Contact Se | arch 🖺 | Clone XD | elete 🐻 I | Notifications | Summary | y 🔿 Detail | PDF | | | |
| Search Name | Cr | eated By | Date Created | Last Mo | odified | Email Free | luency | | | |
| No searches found. | | | | | | | | | | |

This will open a Search page. Enter any criteria for the Contact just like you would when searching for listings. There are a few differences to note, which you will find at the top of the page.

- Enter a "Search Name", this will be seen in the email your contact receives
- Choose the "Email Frequency", which is how often the listing matches will be sent out

| Editing: Charlie Brown > "Aweso | lame the Search. This will appear in the email your Contact receives. | | Choose how often an email |
|---|---|---------------------------------------|-----------------------------|
| Search Name Awesome Search | | Email Frequency Daily | will be sent to the Contact |
| Notify When Matches Go UAG, SLD, or RNT O Yes | Notify of Upcoming Open Houses ○Yes ●No | Open House Timeframe Next 3 Days 🗢 | search. |

- Choose if you want a matched listing that has gone off-market to be included in the email
- Choose if you want Upcoming Open Houses to be sent in the email
 - o If "Yes" choose the "Open House Timeframe"



• Click "Save Search"



To add a Search to your Contact from the Search section of Pinergy

If you have already created a contact you can also attach search criteria directly from the Search page. Start by entering all of the search criteria for that contact, then click the "Attach" button.



You can also attach search criteria from the Search Results page. Simply click the "Attach" button.

| Corporate Websi | ite System Reco | mmendations | | | | | | | w | elcome, Pinergy | Sign Out |
|-----------------|-------------------|-------------|-------|------------|--------|----------------|------------|--------|----------|-----------------|----------|
| pinergy | Home | Contac | ts | Listings | Search | Cloue | d CMA Too | ols | | | More 🔻 |
| Edit Search | Photo Summ | ary 🔻 | Sort: | List Price | • | \$ Sort | De Options | 🖺 Save | 음 Attach | ■ 🔒 🗅 🔹 | |

Enter a Search Name (this is seen by the Contact)

- Select the Email Frequency, which is how often the listing matches will be sent out
- Choose if you want a matched listing that has gone off-market to be included in the email
- Choose if you want Upcoming Open Houses to be sent in the email
 - If "Yes" choose the "Open House Timeframe"

| Attac (CSO, Search | h Search to Contact(s) EXP, CAN, or WDN listings will not be h Name: | Name ached.) | e the Search. Th will be seen by t Contact. | is he Email Frequency | ct how often s will be sent | |
|--------------------------|--|-----------------------|---|-------------------------------|--------------------------------|----------|
| Singl | e Family Search | | | Never | ÷ | |
| Notify RNT () Yes | v When Matches Go UAG, SLD, or s 💿 No | Notify of Upcomin | g Open Houses | Open House Tin Next 3 Days | neframe \$ | |
| | | | | Sele | ected Contacts: 1 | Total: 3 |
| | Full Name 🕇 | Last Login | Low Price | High Price | Property Types | |
| | Brown, Charlie | | | | | A |
| | Coburn,Niki | | | | SF | |
| | Coburn,Niki | 01/04/2023 4:24 PM | | | SF | |
| | Select the Contact by checking the box next to their name. |) | | | Attach | Cancel |

