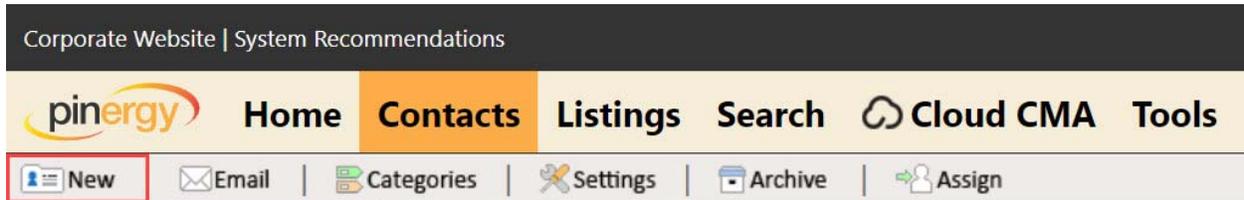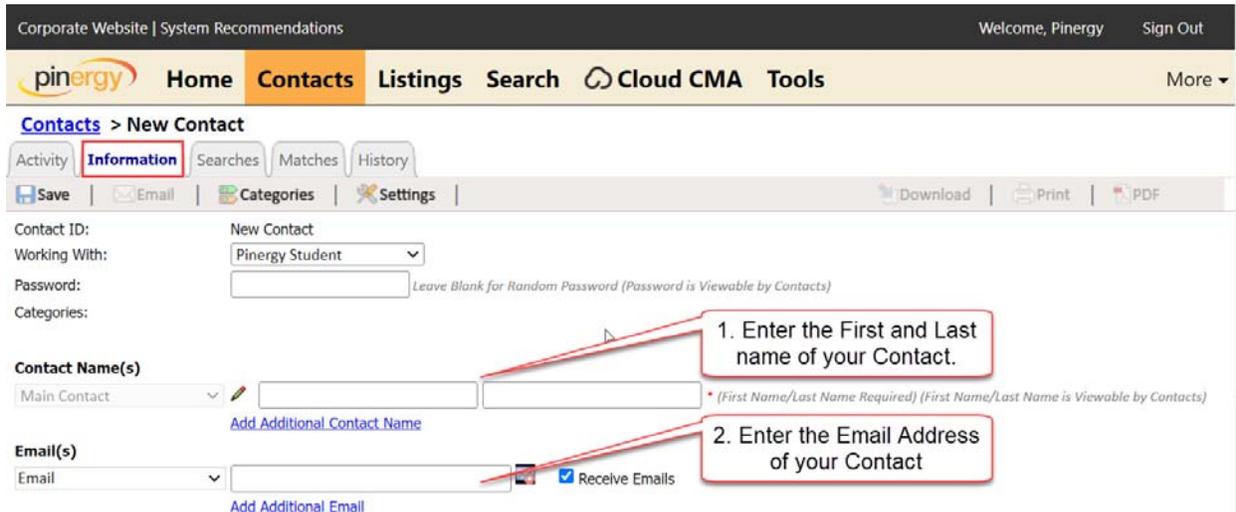## To Create a New Contact

- Click "Contacts" button in the Navigation Bar
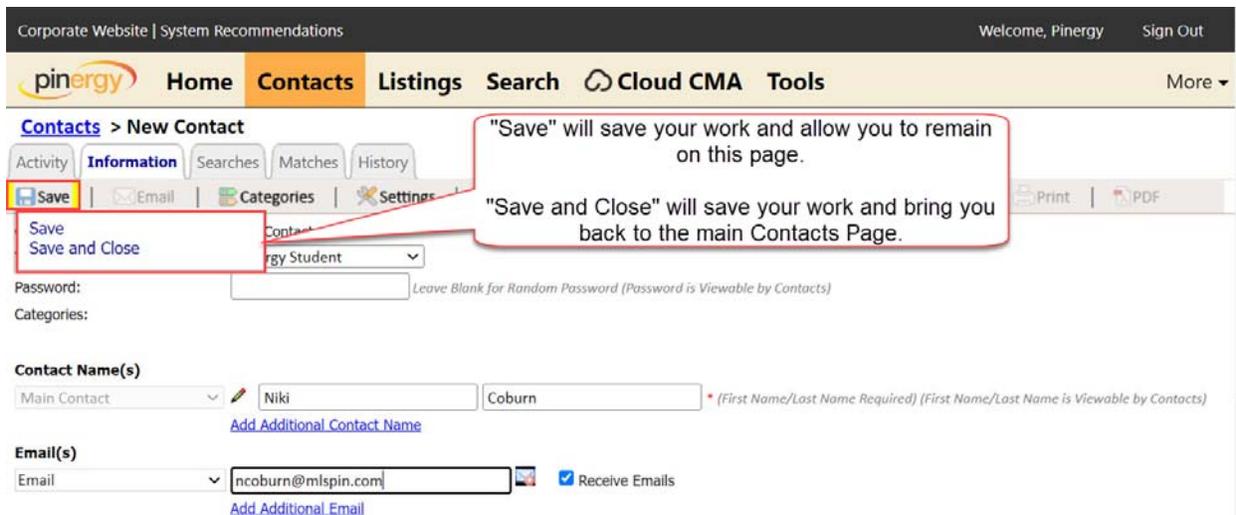

- Click the "New" button

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

- Click "Save" - then "Save"

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.

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.

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

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

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

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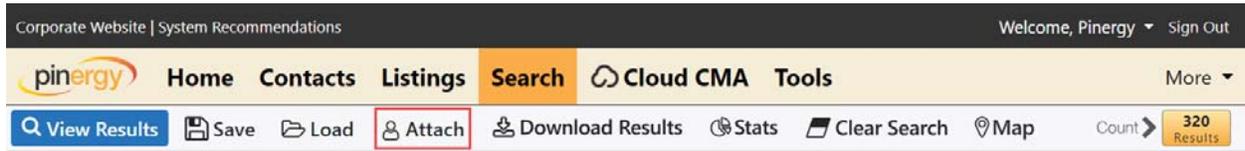- Choose if you want Upcoming Open Houses to be sent in the email
   - If "Yes" choose the "Open House Timeframe"

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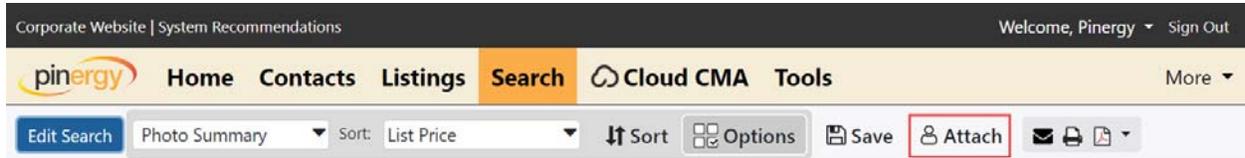
Enter a Search Name (this is seen by the Contact)

- 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"