

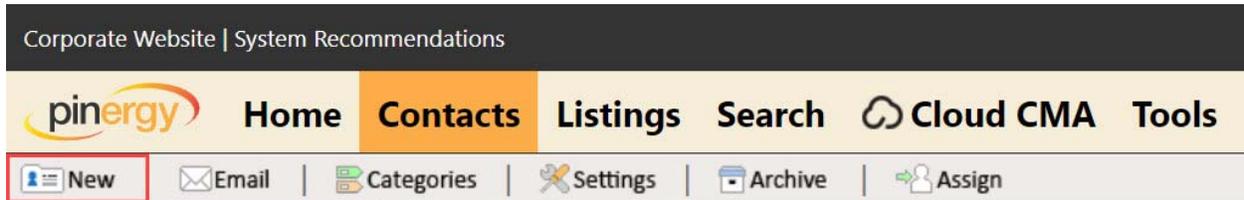


To Create a New Contact

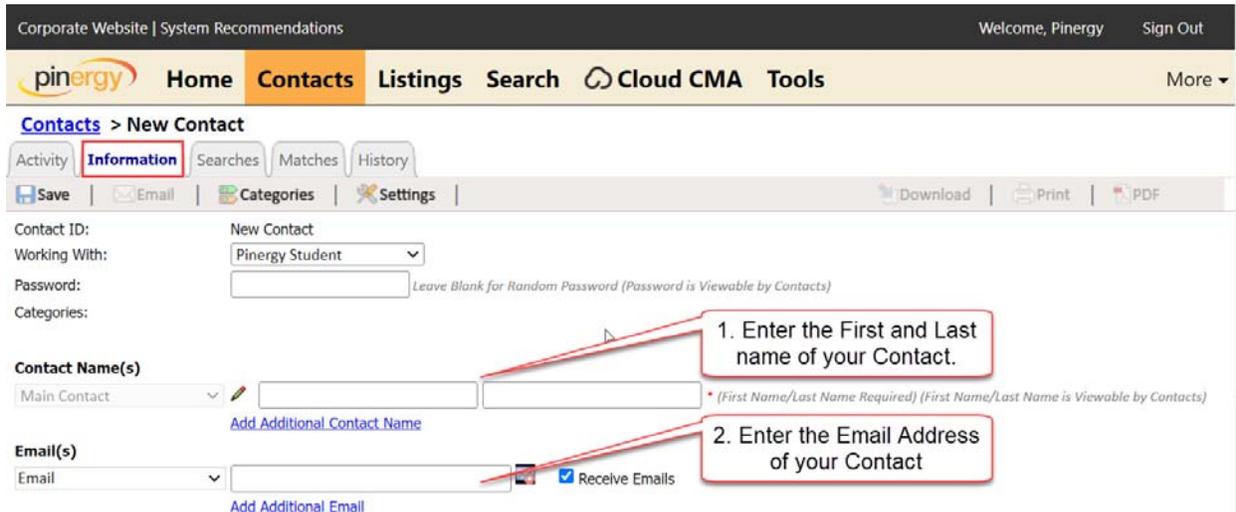
- Click "Contacts" button in the Navigation Bar



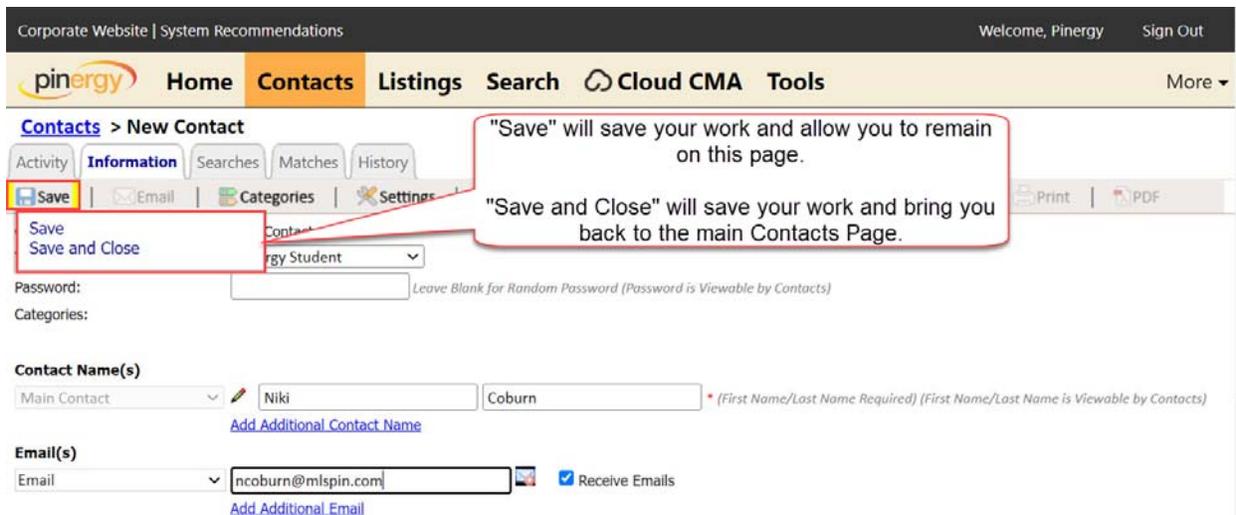
- Click the "New" button



- 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.

Corporate Website | System Recommendations Welcome, Pineryg Sign Out

pinergy Home **Contacts** Listings Search Cloud CMA Tools More ▾

Contacts > New Contact

Activity **Information** Searches Matches History

Save | Email | Categories | Settings | Download | Print | PDF

Contact ID: New Contact
Working With: Pineryg Student
Password: Leave Blank for Random Password (Password is Viewable by Contacts)
Categories:

Contact Name(s)

Main Contact * (First Name/Last Name Required) (First Name/Last Name is Viewable by Contacts)
Spouse ✕ Remove
[Add Additional Contact Name](#)

Email(s)

Email Receive Emails ✕ Remove
Email Receive Emails ✕ Remove
[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.

Contact Name(s)

Main Contact * (First Name/Last Name Required) (First Name/Last Name is Viewable by Contacts)
Spouse ✕ Remove
[Add Additional Contact Name](#)

Email(s)

Email [Resend Verification Email](#) Receive Emails ✕ Remove
Email [Resend Verification Email](#) Receive Emails ✕ 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 * (First Name/Last Name Required) (First Name/Last Name is Viewable by Contacts)
Spouse ✕ Remove
[Add Additional Contact Name](#)

Email(s)

Email Verified Receive Emails ✕ Remove
Email [Resend Verification Email](#) 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 Cloud CMA Tools

[Contacts](#) > Niki Coburn

Activity Information **Searches** Matches History

New Contact Search Clone Delete Notifications Summary Detail PDF

Search Name Created By Date Created Last Modified Email Frequency

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 > "Awesome Search"

CONTACT SEARCH SETTINGS

Search Name
Awesome Search

Notify When Matches Go UAG, SLD, or RNT
 Yes No

Notify of Upcoming Open Houses
 Yes No

Email Frequency
Daily

Open House Timeframe
Next 3 Days

- 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”

Editing: Charlie Brown > "Awesome Search"

CONTACT SEARCH SETTINGS

Search Name
Awesome Search

Notify When Matches Go UAG, SLD, or RNT
 Yes No

Notify of Upcoming Open Houses
 Yes No

Email Frequency
Daily

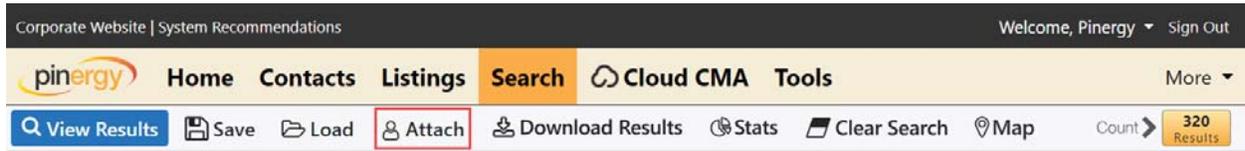
Open House Timeframe
Next 3 Days

- Click “Save Search”

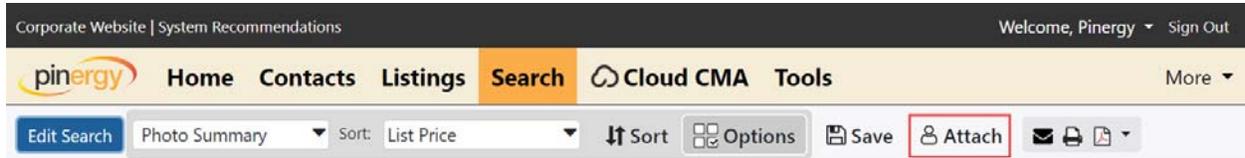
Save Search

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”

Attach Search to Contact(s)

(CSO, EXP, CAN, or WDN listings will not be attached.)

Search Name:

Email Frequency:

Notify When Matches Go UAG, SLD, or RNT: Yes No

Notify of Upcoming Open Houses: Yes No

Open House Timeframe:

Selected Contacts: 1 Total: 3

<input type="checkbox"/>	Full Name ↑	Last Login	Low Price	High Price	Property Types
<input type="checkbox"/>	Brown,Charlie				
<input checked="" type="checkbox"/>	Coburn,Niki				SF
<input type="checkbox"/>	Coburn,Niki	01/04/2023 4:24 PM			SF

Annotations:

- Name the Search. This name will be seen by the Contact.
- Select how often emails will be sent.
- Select the Contact by checking the box next to their name.