Welcome to Buying Buddy

Did You Know?

Buying Buddy® IDX CRM has two components!

Buying Buddy on your Website

Buying Buddy widgets are displayed on your website to provide consumers home-search services and their own **real estate search portal**.

By choosing to register, buyers and sellers get access to advanced features including the ability to save searches, save properties and set up their own just-listed daily, or weekly property alerts.

Buying Buddy widgets are embeddable components that are added to your website pages. Widgets can be placed anywhere on a page. Widgets display properties, forms and other components, including:

- Search panel
- Search Results and details of properties
- Interactive map searching
- Lists of properties
- Lead-capture forms (CMA, etc.)
- My Account panel for signup and login

Integrated CRM

Buying Buddy includes a complete CRM that can be accessed from your Buying Buddy account dashboard.

The CRM / Lead Management system is a comprehensive tool to help you manage all your clients, leads and prospects in the context of their home search activity on your website.

Buying Buddy will help you automate the incubation of leads that are not looking to buy now, so you can focus on more immediate sales opportunities.

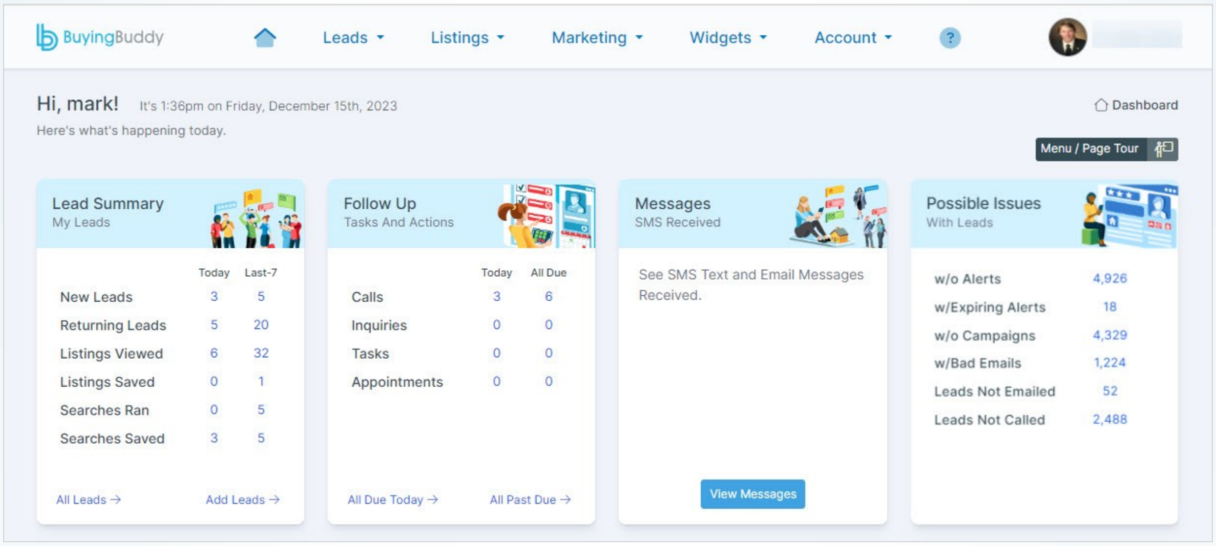
- Keep details on all your leads and contacts
- Track and review all their search activity
- Collaborate with clients on properties of interest
- Automated Drip Campaigns
- Automated follow up and action plans
- To Do lists
- Keep Notes
- Send Emails

BUYING BUDDY

Buying Buddy®
Integrated IDX and CRM

Buying Buddy Dashboard (https://My.BuyingBuddy.com)

Login to your account dashboard at: https://**My.BuyingBuddy.com** using your email address and password.
(Note: You will be redirected to https://leadsandcontacts.com).
The dashboard shows the following:



Personal Profile & Contact Details

Go to 'View Profile' (top menu on right) for the following:
☑ *Check off each item as you review it!*

☐ **User Profile**:
Update your personal contact details
NOTE: Make sure you specify your MLS Agent ID as this connects your listings to you!

☐ **Photo**:
Upload a large photo which you can then crop to the right size.

☐ **Stationary** (optional):
Change how your emails look. Your choices here will be applied to all your emails automatically.

☐ **Signature**:
This is automatically added at the foot of every email that is sent to your leads.

☐ **Preferences**—and **Notifications**

- Set the Default Campaign for new leads. This is the Campaign that gets attached automatically when ever a lead registers on your website.
- Choose which Daily Reports to receive.
- Choose which Alerts and Notifications to receive and their method of delivery (email / SMS).

Check Your Account Settings

Menu: My Account/ Account Preferences

☐ **Capture Options**:
You can make registration mandatory for the following services if you wish:

- Search using all the advanced MLS data fields. *The default is 'Basic' search only.*
- View details of more than (1-20) properties. *The Default value is 3.*
- Execute more than (1-20) searches. *The Default value is 3.*
- Require Phone Number on registration. *The Default value is NO.*

☐ **Preferences and Logo**:
Check your company details are complete.

Menu: Marketing / Campaigns

☐ **Campaigns**:
Take some time to review the standard Drip Campaigns in your account. You can modify these to reflect your own style, or add new ones!

Working With Leads

New leads can be added in several ways:

- **Leads register on your website**.
  This creates a lead in your dashboard. You will be sent an email alert.
- **Add manually**.
  Go to: Leads > Add Lead.
  For multiple leads, select Add More Leads.
- **To Delete a Lead.**
  Go to: Leads. Then use the checkbox to select the Lead. Now select 'Delete' from the available actions at the bottom of the list.

Menu: Leads / Lead Summary panel

Click the Lead Name from any view to go to the Lead Detail panel. On the Lead Detail page:

- Categorize with 'tags', 'categories' and other classification options.
- Add additional contacts (spouse etc.) who can be copied on alerts . Select 'View Lead Profile' in the top set of links to slide out the 'Lead Info' panel.

Search For Leads

Go to: Leads > Lead Summary. Select the top button that says 'Quick Search' to see all options.

In addition, 'Advanced Filters' (link inside the search panel) provide many more search options.

Property Alerts for Your Leads

- On the Lead Detail panel, select 'Alerts'.
- Any Alerts set up the lead, or by you, will be shown here.
- Clicking on 'History' icon will show you a full audit trail of actual email alerts sent, opened and clicked.
- You may modify any Alert.
- To create a new Alert, click 'Create a Property Alert'.
- Any lead can have any number of Alerts set.

Other Lead Activities

- 'View Listings': See all listings the lead has saved or viewed.
- 'Email Lead': Send email to this lead
- 'New Note': Keep notes on this leads
- 'Add Follow Up': Create a Task

Attach a Drip Campaign

Select a drip Campaign to attach to your lead from the Campaigns tab on the Lead Detail page.

All Drip Campaigns can be reviewed and modified by going to: Marketing > Campaigns.

View Activity History

The History tab on the Lead Detail page shows an audit trail of interactions with this lead.

Use the various links at the top of this panel to filter by type of activity.

Follow Up

A summary of your tasks and follow up items is shown on your Dashboard summary.

Go to: Leads > Follow Up.
See a full list of all the Tasks assigned to you associated with leads.

Listings

The property database is regularly updated directly from your MLS. This update completely refreshes all the listing data including price and photos.

Your Listings

Go to: Listings.

Your listings are identified using your MLS Agent ID (or MLS Office ID) that you set in your Profile—so make sure this is correct!

Featured Listings Display on Your Website

Featured Listings shown on your website are typically 'your' listings. However, if you have a few or no listings, then we can change this to show listings from your Office as well.

Enhancing Your Listings

For each of your listings, you can:

- **Upload High Resolution images**.
  This will greatly enhance the photo slideshows of your properties.
- **Modify public remarks.**
  You may add additional comments to your listing which can supplement or replace the existing public remarks

Private Listings

You may add additional 'private' (non MLS) listings in your dashboard that can then be presented on your website with the widgets. For example, your rentals.

These can then be presented using widgets using an appropriate FILTER.

Your private listings are not co-mingled with the MLS data.

Buying Buddy On Your Website

Buying Buddy uses embeddable ‘widgets’ to present home search services on your website. These can be found by going to menu item ‘Websites and Widgets’.

Main Widgets:

Each of the following widgets should be installed on a specific page on your website.

- **Show Search Panel**
  This widget will present the standard search form.
- **Show Results**
  This widget displays Search Results.
- **Show Property Details**
  This widget shows the details of a single property.

Display Widgets

Display selected properties on your website. Go to menu item ‘Websites and Widgets > Getting Started’, and follow the wizard!

- Display properties in a ‘gallery’ style
- Display properties in a ‘list’ view
- Display properties on a map

Custom Search Links

Create custom search links by adding a FILTER to the end of the Search Results page URL.
See below for more details.

Widgets — Getting Started

The ’Display Properties with Widgets’ wizard will help you to choose property search criteria (MLS fields and polygon shapes) to be used with Display Widgets so that you can create unlimited hot sheet pages that dynamically show specified properties. For example, a filter that says ‘Agent ID = Your ID’ is used to present your Listings.

The wizard will also help you create Custom Search Links that you can use in your emails, marketing, Facebook page, blog and so on.

More Advanced Options

Buying Buddy includes many advanced configuration capabilities. Two examples include:

- Create your own Custom search forms
- Create custom Lead Capture methods

For more information see the Online Reference Guide.

BuyingBuddy

Online Reference Guide

To find out more about how to use widgets, Filters and all other aspects of the Buying Buddy system, go to:

http://support.BuyingBuddy.com

More Training and Help

In your dashboard, you will see a ‘Help and Support’ link (in the Menu). Here you will find links to Webinars, short training movies and an education class schedule.

Contact Us for Assistance

In the dashboard look at the bottom of the menu for ‘Help and Support’.
Contact us by submitting a Help Desk ticket.

Request HELP!
Report Problems