CRM Agent Exercise 1

Contact Clean-Up

Getting your contacts into the booj CRM is an imperative step in using the system to its full potential. In order to do that, you must first prepare and clean up your contact list. All contacts will be able to be added through a CSV file. The contact important tool will let you import any CSV file and map fields into the booj CRM.

Contact List Sources

Write down all of the places where you currently have contacts stored.

1.
2.
3.
4.
5.
6.
7.
8.
9.
10.

After identifying where your contacts are currently housed, export each contact list as a CSV file and save them in an easily accessible place on your computer.

Contact Information Discovery

As you begin cleaning up your contacts, there are some valuable data fields that inside of the booj CRM that you may wish to take advantage of upon import. These valuable fields (listed below) will help you stay top-of-mind with your sphere. You may not have all of this information collected yet or you may realize that much of this information is located in multiple systems. For example, you might not have the birthdays for each of your contacts, but if you are friends with them on Facebook, that information is available; it just needs to be searched for and recorded. Add the list of booj contact data fields (below) to your exported CSV files and begin finding this information for all of your contacts.

- Birthdates
- Anniversary Dates
- Custom Fields
- Phone Number
- Email Address
- Important Notes
- Tags

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Organizing Contacts into Groups (Tags)
Tags are how leads and contacts are categorized within the booj CRM. Tagging contacts will allow you to easily sort, filter, and organize your leads & contacts into groups. You can also quickly assign marketing plans to and report off of tagged contact groups.

There are three ways that you can organize your contacts with tags in mind:

1. **Add tags columns directly to your exported contact CSV file(s)**
   - Add three columns titled "Tag 1", "Tag 2", and "Tag 3" to your existing CSV files. Then add a tag in each column, for each contact. Each tag added to the CSV file will be brought into the contact record once the file has been imported and mapped within the CRM.
2. **Organize your contacts into separate CSV files based on Tag groups**
   - When importing contacts into the CRM, you can bulk assign tags to all of the contacts within that import group. To do this, you will need to organize your contacts (prior to importing them) into separate CSV files so that you can assign a tag to the entire group. You will then import multiple contact lists into the CRM and select the appropriate tag to the group.
3. **Add all contacts on your exported CSV files to the booj CSV contact import template**
   - The contact import template allows you to add up to 3 tags for each contact.. By entering tag names into the Tag 1, Tag 2 and Tag 3 columns within the file, each tag will be brought into the contact record upon import.

**PRO TIP: Complete the CRM Tagging Exercise to understand how to apply strategy to grouping contacts.*

Adding Custom Fields into the CRM
Once you have access to the booj CRM: You can add up to 12 Custom Fields to the CRM. Custom Fields are helpful for collecting/recording useful information that is most important to your business. Custom fields live across all contact records and can be used in place of a note. For example, you may want to add "Favorite Golf Course" as a custom field if that is an important piece of information that you want to collect for each contact.

1. Log on to MAX/Center (www.remax.net) using your @remax.net credentials
2. Within MAX/Center, click on the "***booj***" tile
3. Click on the **Contacts & Leads** tab within the booj platform
4. In the CRM click on the **Person** icon in the upper right corner
5. Click on **Settings**
6. Use the Setting Pages dropdown menu in the upper right to select **Contacts & Leads**
7. Click on the **Custom Fields** Tab
8. Click on the **Add Custom Field button**
9. Add **Field Name** and **Type,** then click **Add Field**

**PRO TIP: If a Custom Field has been created inside of the CRM, it can be utilized as a field for your import spreadsheets.*