

AGENT QUICK START CHECKLIST

**BHHS
CONNECT**
POWERED BY KVCORE

1

TAKE THE AGENT QUICK START COURSE THROUGH KVCORE

Take the 'Agent Quick Start' course available in KvCORE's Learning Portal once you gain access to your account. This fantastic resource is incredibly thorough and allows you to go at your own pace.

KvCORE agent quick start course preview! It's likely that you may be interrupted by something while you're learning, and this program is broken down into bite-sized pieces. It also allows you to pick right up where you last left off, whether you're at the end of a section or in the middle of a video.

Whether you're starting from scratch or just need a refresher this is truly one of the best resources available. We can't recommend it enough!

2

UPDATE YOUR PROFILE

While the majority of your personal information will sync from BHHS Resource Center, there are some important fields that don't. Upon your first login, you'll want to take care of the following, at bare minimum:

Email 'From' Name

Daily Call Settings

Designations

Email Signature

3

DOWNLOAD THE APPS

Accessing KvCORE while on the go is important! You also don't want to miss out on the super cool features contained in the Open House app.

You'll want to make sure that you download both, AND enable push notifications on each!

Please note – Our apps have been personalized! [Make sure you download from the links here.](#)

4

ENABLE YOUR EMAIL SYNC

Syncing your company Google/Gmail account to kvCORE can be a game-changer! It gives you the opportunity to sync your calendar, tasks, email, and contacts straight from Google to your Smart CRM and Dashboard.

It's an easy process that can quickly positively impact your kvCORE experience.

But wait, there's MORE! You have the ability to individually choose which portions of your Google data you'd like to sync... so cool!

5

REVIEW OUR DEFAULT SMART CAMPAIGNS

Because KvCORE includes some default automation, it's important to understand how those campaigns work. To make sure you're up-to-speed, take a look at the documentation we've created on this topic.

6

GOT CONTACTS?

The heart of any CRM is the contacts stored within it. Take a look at the various ways in which contacts can be added to KvCORE. Have a list of contacts you'd like to add? We HIGHLY RECOMMEND that you take advantage of the KvCORE Lead Import team, who can help you upload them properly.

June 2023 transition note – Unless you've opted-out, your contacts from Cab Corner will automatically be transferred into KvCORE when the system goes live.

7

SETUP PROPERTY ALERTS

Let's get those buyer searches up and running! Setting up property searches for your active buyers is key!

Track their activity, answer questions, and more.

8

CONFIGURE YOUR PERSONALIZED DOMAIN

If you have a vanity domain that was pointed to your old website, it'll need to be updated as close to go-live as possible.

9

ORGANIZE YOUR CONTACTS

To truly make the system work for you, you'll want to make sure that your contacts are organized properly! Set aside some time to update your contacts to reflect their accurate Contact Status and Contact Type values.

It's not only a recommended best practice, it's also going to help you visualize your pipeline.

NEED MORE HELP? REFERENCE THE BHHSCONNECT GUIDE ONLINE

Visit <https://blog.mycabcorner.com/bhhs-connect-guide/> for a full catalog of helpful articles and links.