

A LIST OF 10 THINGS TO DO

ONBOARDING TASK LIST

Are you ready to dive into kvCORE but not sure where to start? We've got you covered with our top 10 recommended actions to kick off your journey.

- 1 Complete the Agent Quick Start Training**
Block off 4-5 hours on your calendar to complete the 'Agent Quick Start' training in KvCORE's Learning Portal.
- 2 Choose 2-3 features to focus on a time so you don't get overwhelmed.**
Only when using them becomes second nature should you add another. It's not a sprint, it's a marathon.
- 3 Update your profile**
<https://blog.mycabcorner.com/bhhs-connect-guide/#profile>
- 4 Download the apps**
(use the link found on the dashboard!)
- 5 Review default Smart Campaigns.**
Know what contact type & contact status options trigger
https://blog.mycabcorner.com/bhhs-connect-guide/automation/#smart_campaigns
- 6 Import your contacts!**
Use the KvCORE import team and we recommend importing all contacts into Sphere status so the only campaign running will be Ninja Flow.
- 7 Organize your contacts**
https://blog.mycabcorner.com/bhhs-connect-guide/contacts-leads/#staying_organized
- 8 Enable your Google sync**
(features can be controlled individually)
- 9 Setup Property Alerts**
<https://blog.mycabcorner.com/bhhs-connect-guide/automation/#property-alerts>
- 10 Review your website**
Determine any customizations you'd like to make.
<https://blog.mycabcorner.com/bhhs-connect-guide/website/>