

TopAgent Procedures

TopAgent Access:

- Login in to the Intranet
 - Click the QuickLinks drop down box and choose TopAgent(located at the top right corner)

Contact Manager:

Add a contact:

- Click the contact manager tab
- Click on add a contact
- Fill in desired information
- If you would like to add the individual to a group click the Groups/Interests tab located on the right hand side of the screen (ADD THE GROUP BEFORE YOU HIT SAVE)
- Click save when all information is completed

Add a group:

- Click the contact manager tab
- Click the manage groups tab
- Click add
- Name the group
- Click add

Create a flyer:

- Click the marketing materials tab
- Click the flyers tab
- Select the desired template
- Click the create/edit tab on the right
- Choose advanced editor before you begin any editing
- Scroll over the template and you will see “change” boxes appear. These boxed are ones that can be edited
- Click on any box you would like to edit
 - After chosen the editing box will appear on the right
- Type and format any text you desire
 - If you need to make the text box larger or smaller use the resize feature and click on the “+” or “-“ tab
- If you are changing the photos, click on the image
 - Choose my pictures
 - Choose the photo you would like to insert
 - Click on replace existing image

~If you need to upload new photos to your TopAgent account, contact me and I will do it for you~

- To save your flyer give it a title
- Click on “I have previewed the print version”
- Click save

Create a postcard:

- Click the marketing materials tab
- Click the postcards tab
- Choose the postcard you would like to create whether it is Just Listed, Just Sold, Open House, etc.
- Choose whether you want a regular size postcard or a jumbo postcard
- Select the desired template
- Click the create/edit tab on the right
- Choose advanced editor before you begin any editing
- Scroll over the template and you will see “change” boxes appear. These boxes are ones that can be edited
- Click on any box you would like to edit
 - After chosen the editing box will appear on the right
- Type and format any text you desire
 - If you need to make the text box larger or smaller use the resize feature and click on the “+” or “-“ tab
- If you are changing the photos, click on the image
 - Choose my pictures
 - Choose the photo you would like to insert
 - Click on replace existing image

~If you need to upload new photos to your TopAgent account, contact me and I will do it for you~

- To save your postcard give it a title
- Click on “I have previewed the print version”
- Click save

Creating an email campaign:

- Click on the campaigns tab
- Choose custom or pre-built campaign (custom will consist of pieces you have created.)
 - Pre-Built Campaigns
 - Scroll through the inactive selection of campaigns (to view the content included in these campaigns check the box and click on view content)
 - Once you have chosen a pre-built campaign, click on manage contacts
 - Choose the group or individual you want added to the campaign and click add to campaign
 - Click done
 - Custom Campaigns
 - Click on add a campaign once inside the custom campaign window
 - Name the campaign
 - Choose a campaign type (how you want it sent: by date, # of days, etc.)
 - Click next
 - Click add next to pieces

- Find the piece you wanted included from marketing pieces you have created whether it is a flyer, postcard, etc.
- Type a subject for that particular piece
- Fill in the date, number of days, etc when you want the piece to go out
- Once you have added all of the pieces you want included in the campaign hit finish
- Choose the campaign you just made and click on manage contacts
- Choose the group or individual you want added to the campaign and click add to campaign
- Click done