KVCORE SETUP

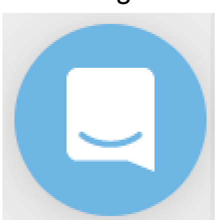
Introduction [Course Intro Link]()

Using Google Chrome is the best way to navigate kvCORE and your online search/viewing experience. KvCore does not operate well with some browsing platforms.

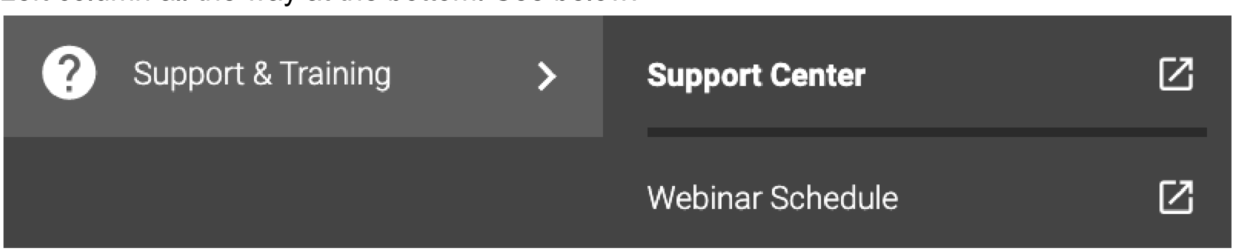
Common Terms and Other Helpful Information:

Login Link: https://new.kvcore.com/login
User Name(Email):
Password:

IMMEDIATE SUPPORT FROM ANYWHERE INSIDE KVCORE
Bottom right corner of any page click the icon. See below:

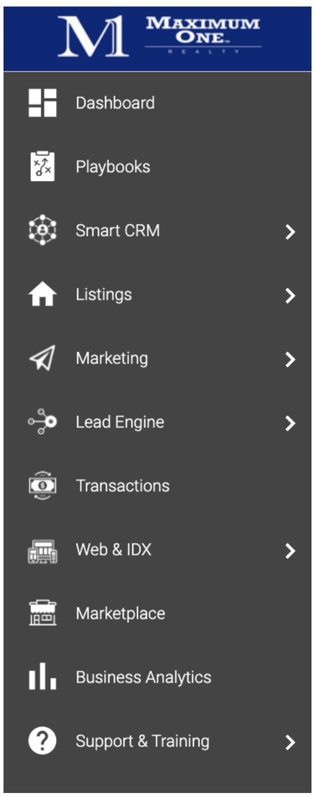


ON-DEMAND TRAINING ANYTIME
Left column all the way at the bottom. See below:



KVCORE DASHBOARD COLUMN of ITEMS

This is where you will find all the tools and components of the system. Left column of the dashboard. See below:



***ANYTIME YOU SEE ARROWS THIS SIGNIFIES THAT THERE IS MORE TO SEE**

BROWSER/INTERNET PLATFORM: Where you go to get on the internet (Google Chrome, Edge, Mozilla Firefox, Internet Explorer, Safari, etc.)

DASHBOARD: Refers to main page of the system

INTERNET PAGE: The **“window”** open to the domain name you typed in (ex. www.kvcore.com).

PAGE TAB: This is what is at the very top of computer screen when on a page. You may have several TABS which represent the multiple **pages** you have open. You can go between them anytime by clicking on the **“TAB”**.

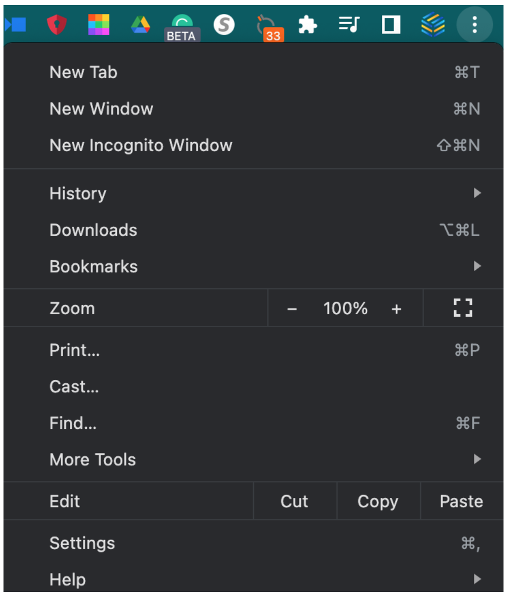
BROWSER BAR:

ARROW POINTING LEFT= GOING BACK IN BROWSER
ARROW POINTING LEFT= GOING TO PAGE YOU JUST LEFT
CIRCULAR ARROW= REFRESH.
*****Important Tool: Using this will refresh your browser page.**

ADDING ANOTHER WEBSITE PAGE WITHOUT CLOSING THE ONE YOU ARE IN.
At the very top of your computer screen while on the internet the display will show what “Windows”/ “Website” you have open. You can add many without having to log out of one. Simply “add” a new “page” or website (ex. www.anykindofwebsite.com). To add a new page click the + (plus sign) next to the current page you are on. See below:

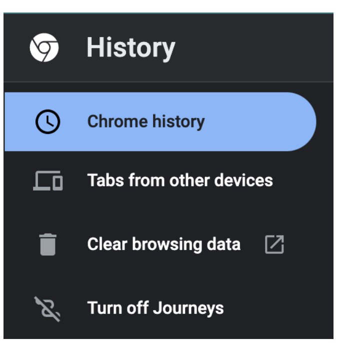
***You can go between pages without having to log out. Just click the tab for the one you want to see.**

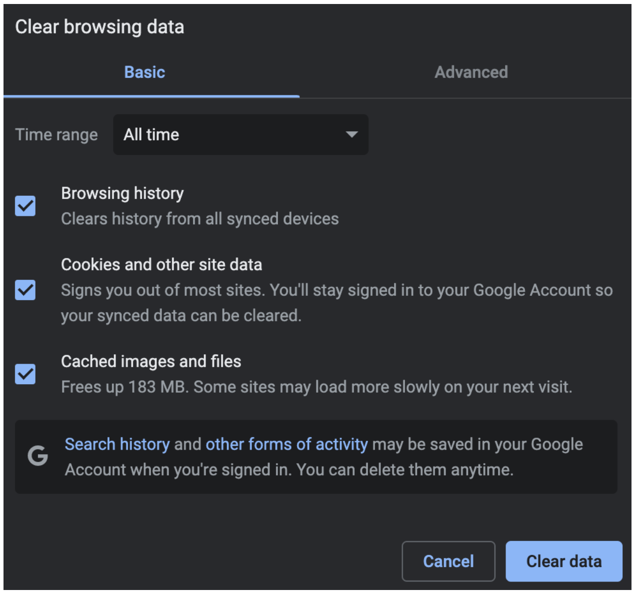
There may be times where you will need to **CLEAR** your browsing **COOKIES** or **CACHE**.



Click the 3 stacked **WHITE DOTS** on the far right side of your browser bar.
Click the **arrow** out to the side of the **HISTORY**

Click again on **HISTORY**
Click on **CLEAR BROWSING HISTORY.** See below:





5. Check the boxes and then click **CLEAR DATA**

DOWNLOAD KVCORE APP

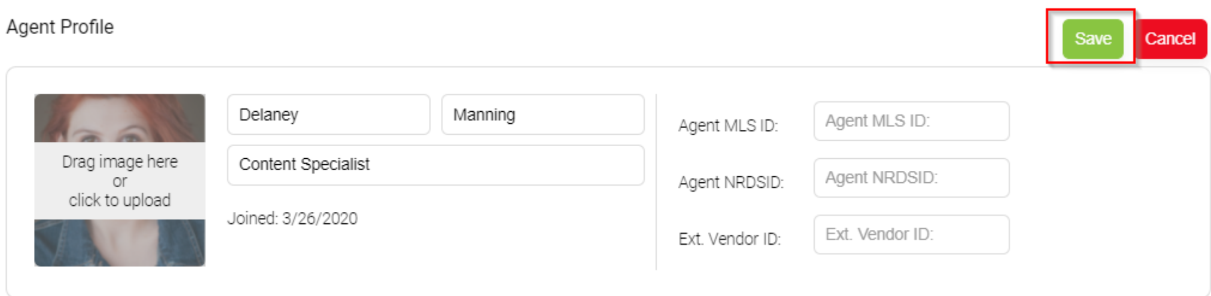
Download the kvCORE Mobile App

Clients can chat with you directly from CORE Home. As an Agent, you'll manage and respond to those messages within kvCORE. Download the kvCORE app to quickly receive and respond to incoming chats. Download the App for Apple or Android below.

Profile Overview

Learn to Access and Edit Your Profile

When making any updates to your profile, remember to click 'Save' on the top right!



Agent Profile Tips & Tricks

'My Profile' Fields

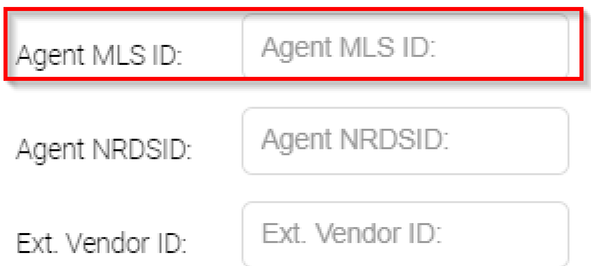
Basic Profile

Name
Your name as you'd like it to appear to your contacts.
Title
Your title as you'd like it to appear to your contacts.
Profile Image
The image you'd like displayed on your website.
Please Note: The exact recommended image dimensions are 512px x 512px (a square image.) If you upload a photo that is not 512 x 512 the system will automatically reduce the image.
How to Edit Your Profile Image

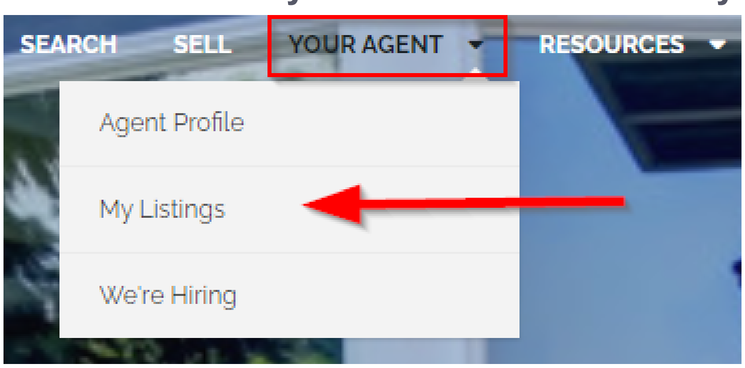
Agent MLS ID
Add your Agent MLS ID in order to automatically sync your personal listings to your kvCORE website. Your Agent MLS ID can sometimes differ from the ID you use to sign in to your MLS. That's because kvCORE uses

the specific Agent MLS IDs in the IDX feed to identify you. If you need assistance finding your Agent MLS ID please reach out to Support.
Please Note: New listings you add to the MLS are updated as fast as possible in kvCORE. Many MLS's will update within 30 minutes and the majority of MLS's will update every hour. If your listing has not been updated within 24 hours please reach out to Support at kvcore@insiderealestate.com.

If you have multiple MLS IDs add them separated with a comma and no spaces.



After your ID is added, your listings and the listings you are a Co-Agent on will be shown on your website within the 'My Listings' tab.



This menu is also where your manually added exclusive, coming soon, or sold listings will populate.
Please Note: If your listings are not showing on your kvCORE please make sure through your MLS that you have allowed the Listing(s) to be shared to the IDX, other methods would be to verify the Listing has been Shared to the Internet or the listing is Active.

How to Add Your Personal Listings to Your Website

Agent NRDSID

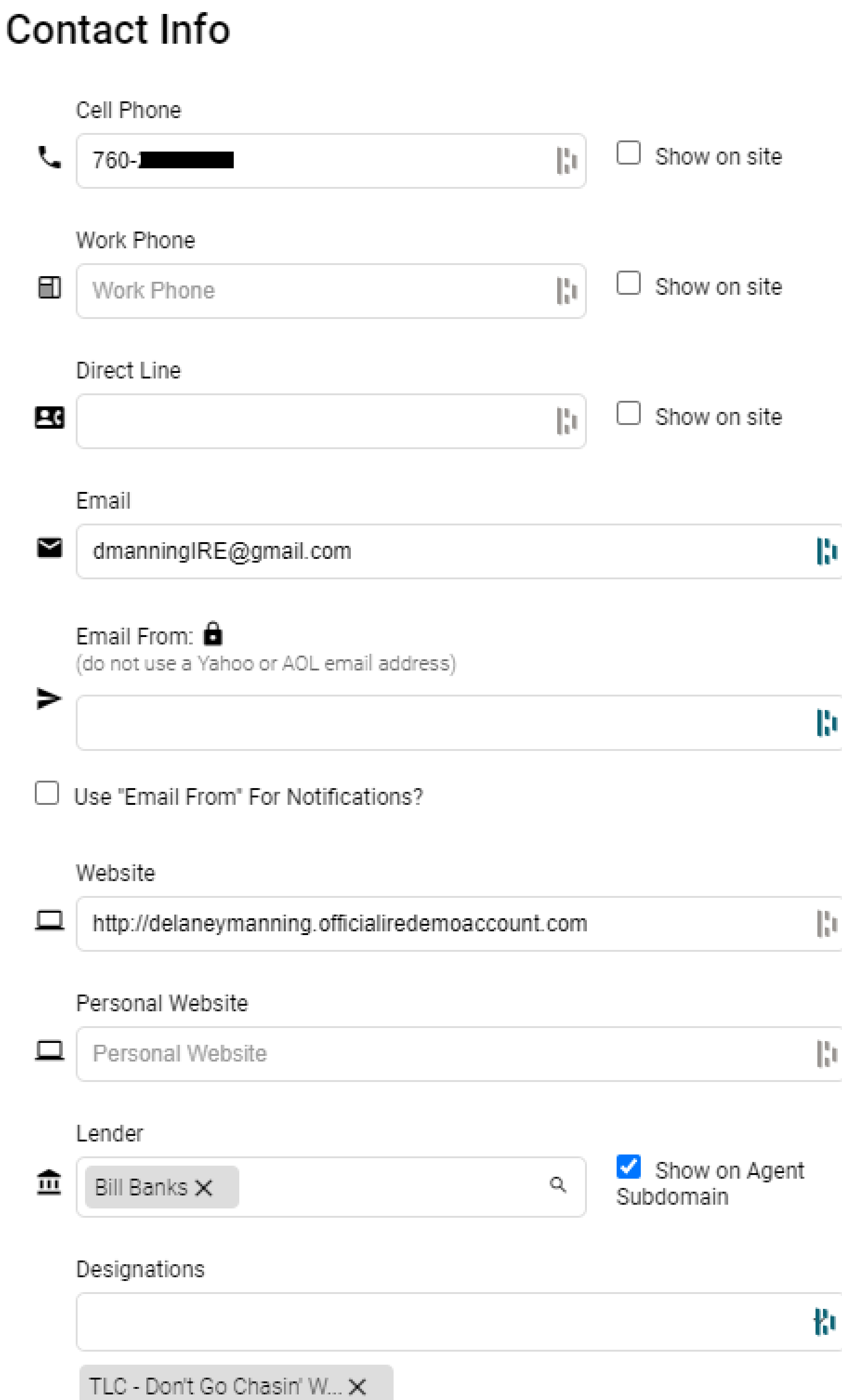
Your NRDS ID is required for some SSO and API connections with kvCORE. If you use an SSO that requires an NRDS ID insert it into this field.

Current requirements:

- **Form Simplicity**

Click Here if you need to find your NRDS ID.
Ext. Vendor ID
If you need an external vendor ID it will be given to you by your brokerage. If you're unsure if you need an external vendor ID please reach out to your Broker for assistance.

Contact Info


Contact Info

Cell Phone
760-[redacted]
Show on site

Work Phone
Work Phone
Show on site

Direct Line
Show on site

Email
dmanningIRE@gmail.com

Email From:
(do not use a Yahoo or AOL email address)

Use "Email From" For Notifications?

Website
http://delaneymanning.officialiredemoaccount.com

Personal Website
Personal Website

Lender
Bill Banks
Show on Agent Subdomain

Designations
TLC - Don't Go Chasin' W...

Cell Phone

Your cell number. This is the number that will be connected to your Smart Number. *To learn more about your Smart Number, click here.* This number will not be visible to your contacts if the 'Show on Site' is not checked.

Work Phone

Your work number. This number will not be visible to your contacts if the 'Show on Site' is not checked.

Direct Line

Your direct line. This number will not be visible to your contacts if the 'Show on Site' is not checked.

Phone 'Show on Site' Checkbox

When checked, this replaces the shared Smart Number on your website with the selected number. Please Note: Only one number can be checked at a time.

How to Show Your Personal Number on Your Website Instead of Your Smart Number

Email

The email used to log into kvCORE.

Please Note: If you change this email in your profile it will change the email you need to use to log in.

Keep in mind that some accounts may not be able to change the 'email' setting unless they are an Administrator. If you would like to change your email in this case, reach out to your Admin for assistance.

Disclaimer: DO NOT use an email associated with AOL or Yahoo as they often do not work correctly with kvCORE tools and could be flagged as spam.

Important: Gmail Addresses (or emails that don't match your kvCORE website domain.) It's a known challenge with Google that if you are sending from an "@gmail.com" address in kvCORE, some email providers will drop it into spam (but not always). Make sure the email address you use with kvCORE is something professional, preferably something that matches your kvCORE website domain. When an email arrives from a domain that uses an address from a different domain it is treated as malicious or suspicious.

Email From (Vanity Email)

This email will show on the emails that are sent from kvCORE. All of your campaigns and listings you send out will show as being 'from' this address.

Use "Email From" For Notifications Checkbox

If this box is checked, you will receive system communications (like New Lead emails) to the 'Email From' email address.

Website

Your actual website that is created when you're added to the kvCORE system. It does not auto-update if you purchase a Vanity Domain or change the subdomain - it will need to be manually updated.

Personal Website

This is ONLY if you are using the Foundation template.

Please Note: Foundation is InsideRE's legacy template - there is no plan for updates (i.e. ADA Compliance).

Lender

You can select your preferred Lender from this section.

Lender 'Show on Agent Subdomain' Checkbox

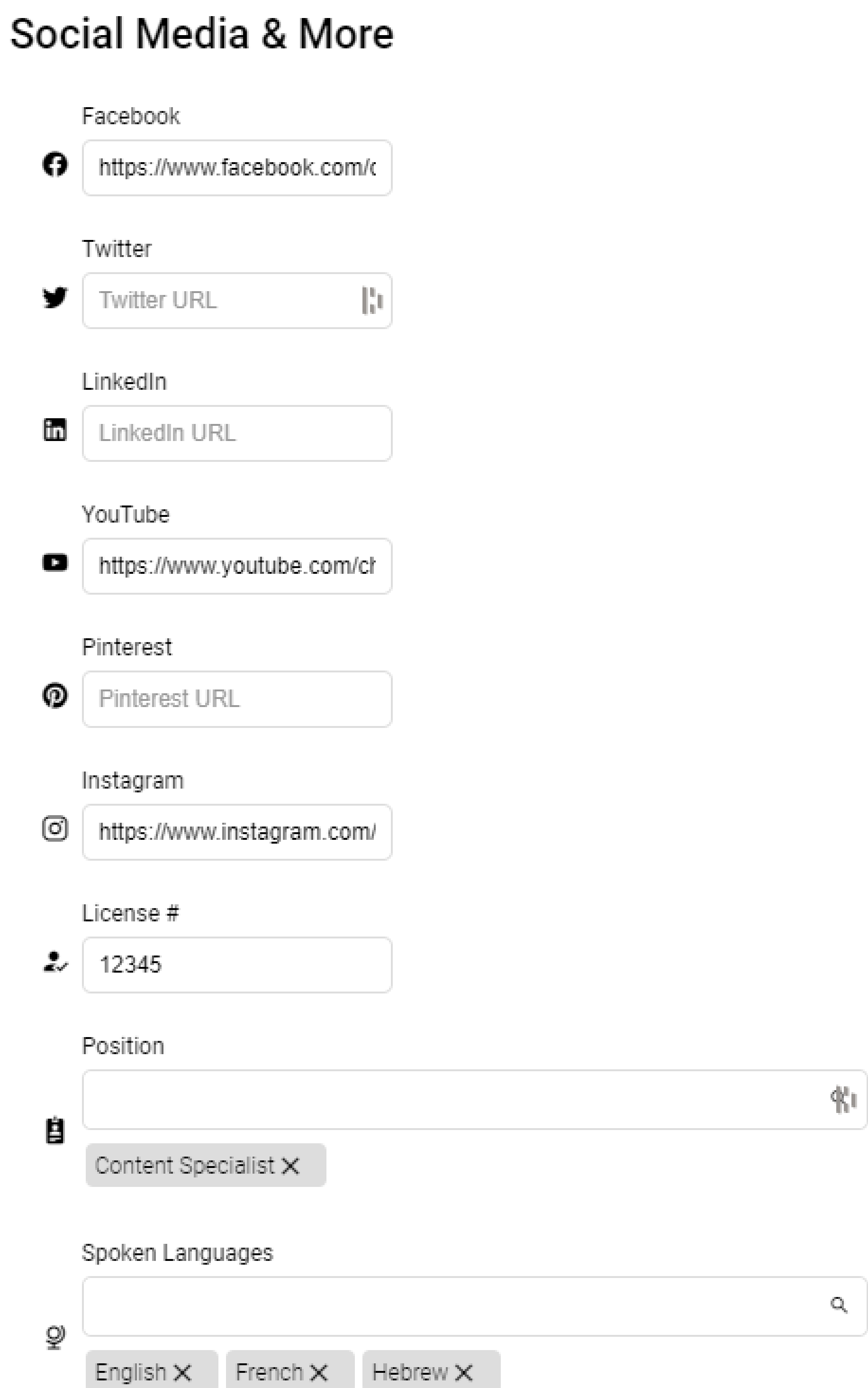
With a preferred Lender chosen in your profile you can trigger the 'Finance' page to show on your site by checking the 'Show on Agent Subdomain' box.

To learn more about the Finance page, click here.

Designations

You can use the Designations section to add any credentials you wish to display on the 'Agent Profile' tab on your website or on your Office/Team/Company Agent Roster.

Social Media & More



Social Media Links

You can add a link to your Facebook, Twitter, YouTube, Pinterest, and Instagram here. These will be displayed on your website for your contacts to click and find your social media pages.

License #

Here you can add your license number. This will be displayed on the 'Agent Profile' page of your website.

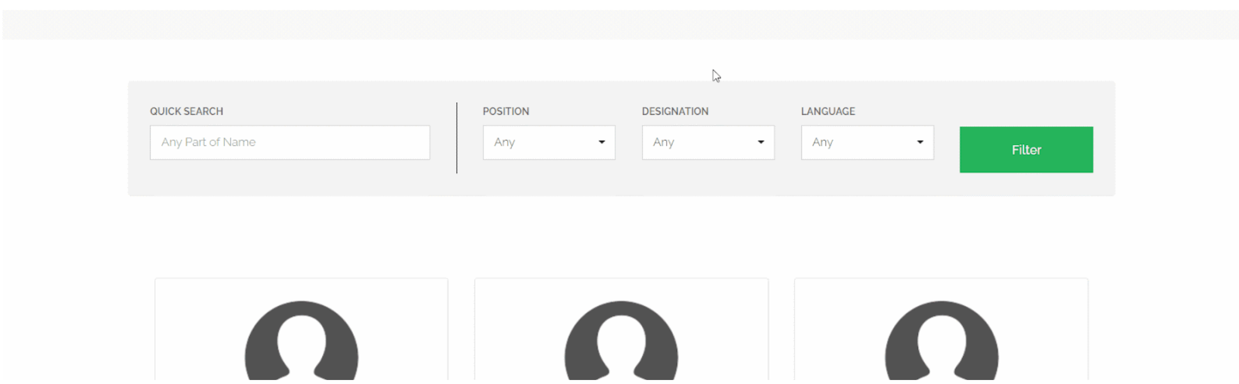
Position

Add your position which will be visible on the 'Agent Profile' page on your website and Agent Roster. Ex: Licensed Realtor, Broker, or Mortgage Advisor

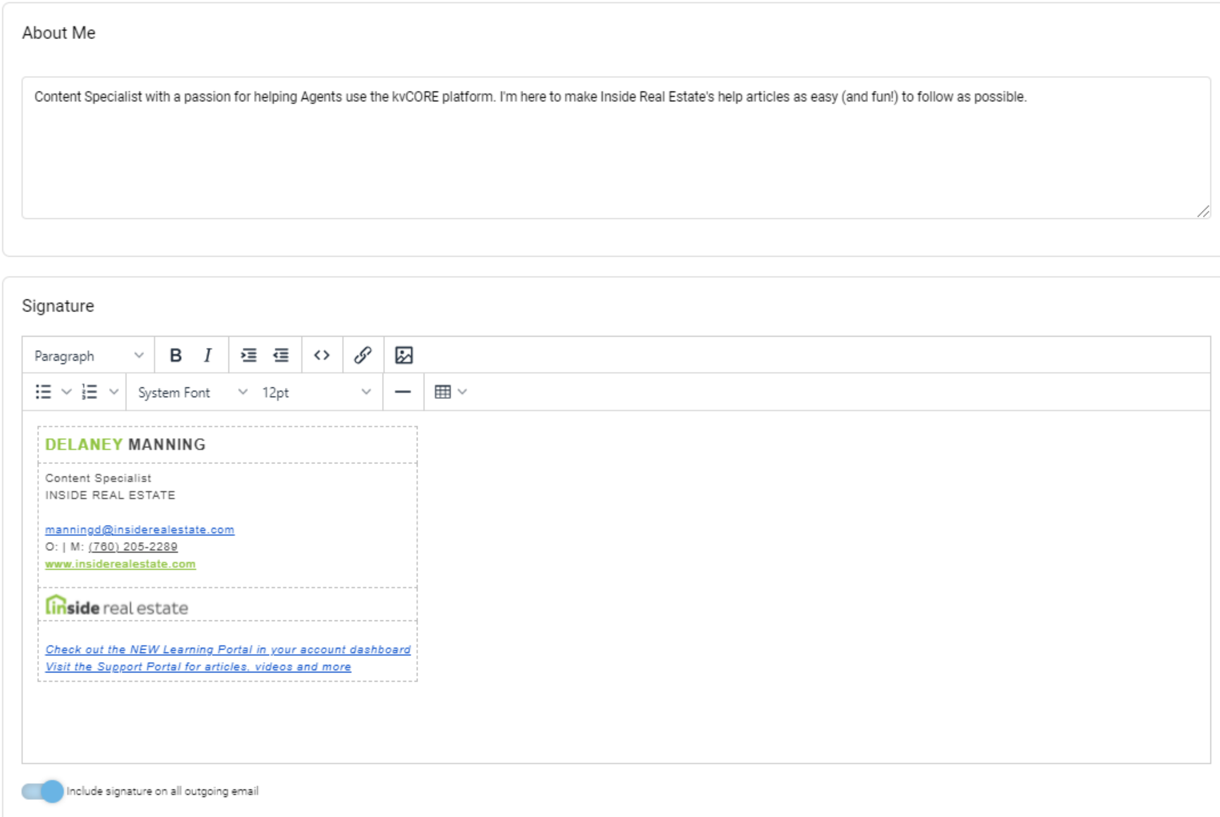
Spoken Languages

Your spoken languages can be added here for your contacts and those viewing your Office/Team/Company Agent Roster page.

Your position, languages spoken, and designations can be used by potential clients to search on Office and Company websites! By filling in as much information about yourself as possible, people can find you by your specializations easily from the sites you're included on, using the 'Agent Roster'.



About Me & Signature



About Me

The section beneath your basic profile info is "About Me." This is the spot for your bio and it shows on the 'Agent Profile' page on your website. You can enter any plain text that you want, or you can use HTML.

How to Customize Your Agent Bio

Signature

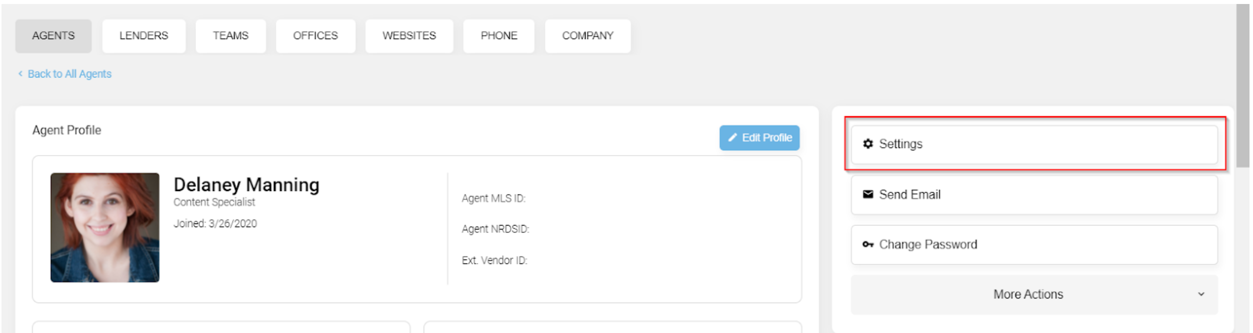
Here you can set your personalized signature which can be automatically added to all emails you send from kvCORE.

Include Signature On All Outgoing Email Toggle

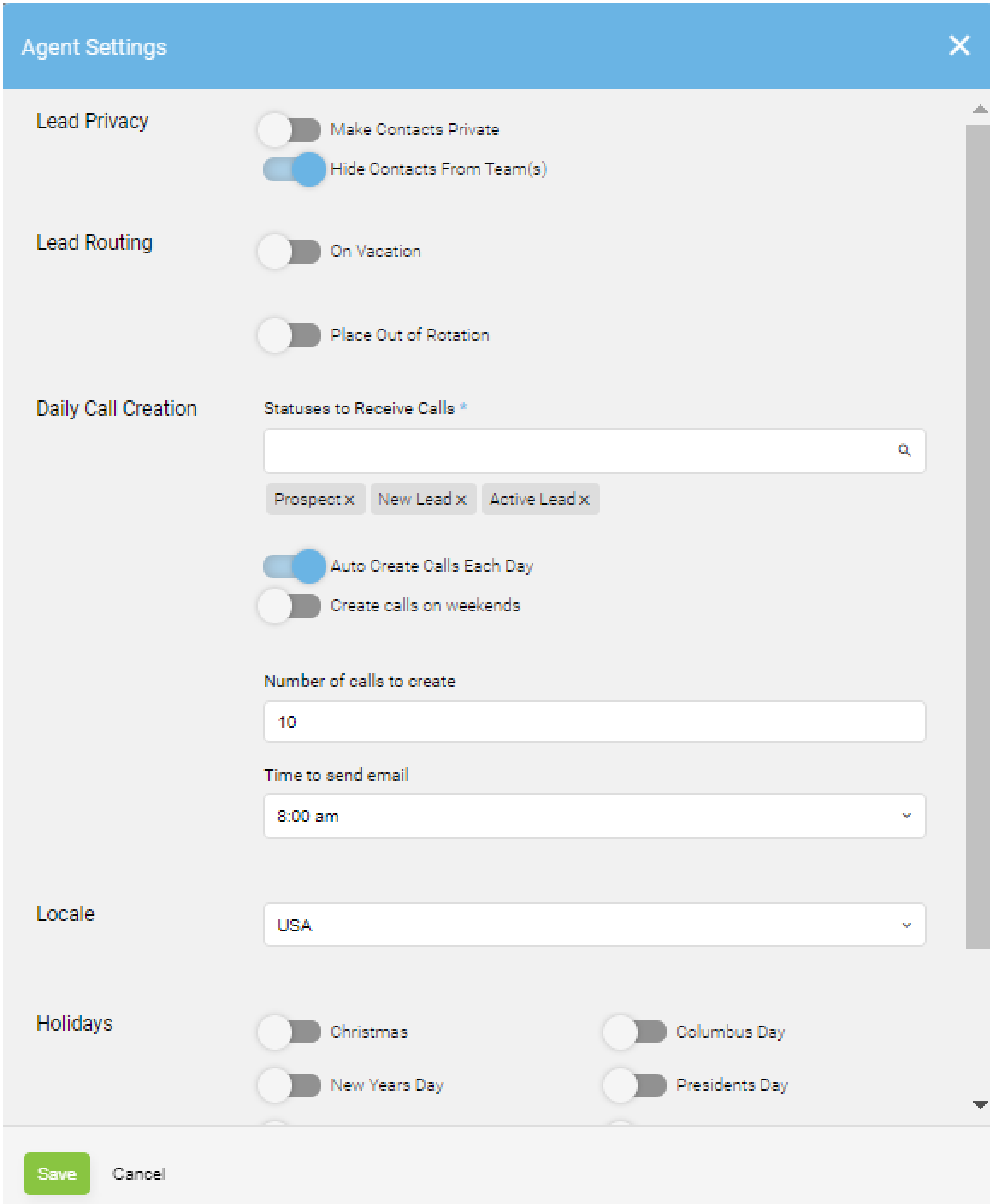
You should toggle this on so that all emails sent from kvCORE automatically include your signature. This includes Smart Campaign emails, Search Alert notifications, Seller Reports, and every other type of email.

Profile Settings

Once you've gotten your basic profile setup, you can access more advanced settings by clicking on the 'Settings' button in your profile. These options allow you to set Lead Routing and Daily Call rules specific to you.



Here, you can enable Lead Privacy, set yourself to 'away' in Vacation mode, adjust your Daily Call Creation settings, and mark 'off' days for specific Holidays.



Lead Privacy

If your Company or Team has enabled lead privacy you can use this toggle to hide your contacts from Admins.

To learn more about lead privacy, click here.

Lead Routing

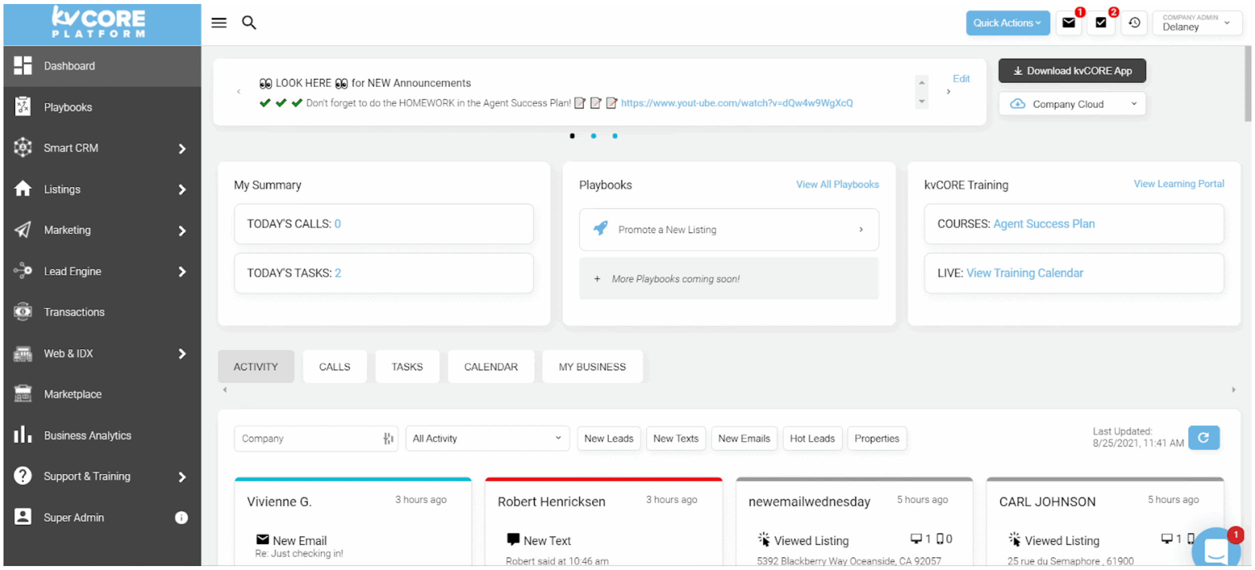
Set your vacation days to stop leads from being routed to you while you're out of the office, or remove yourself from lead rotation.
To learn more about lead rotation, click here.
Daily Call Creation
Daily 'calls to make' are displayed on your dashboard and in your mobile app dialer. These calls are triggered off of events that are set in Smart Campaigns, or from events that your contacts will trigger as they use your website (like if they saved a listing).
To learn more about daily call creation, click here.
Locale
Select either the USA or Canada based on your locale.
Holidays
To make it easier to mark yourself 'Away' for holidays instead of using the Vacation toggle, select the Holidays on which you would not like to receive leads from your Company or Team.

Daily Call Creation

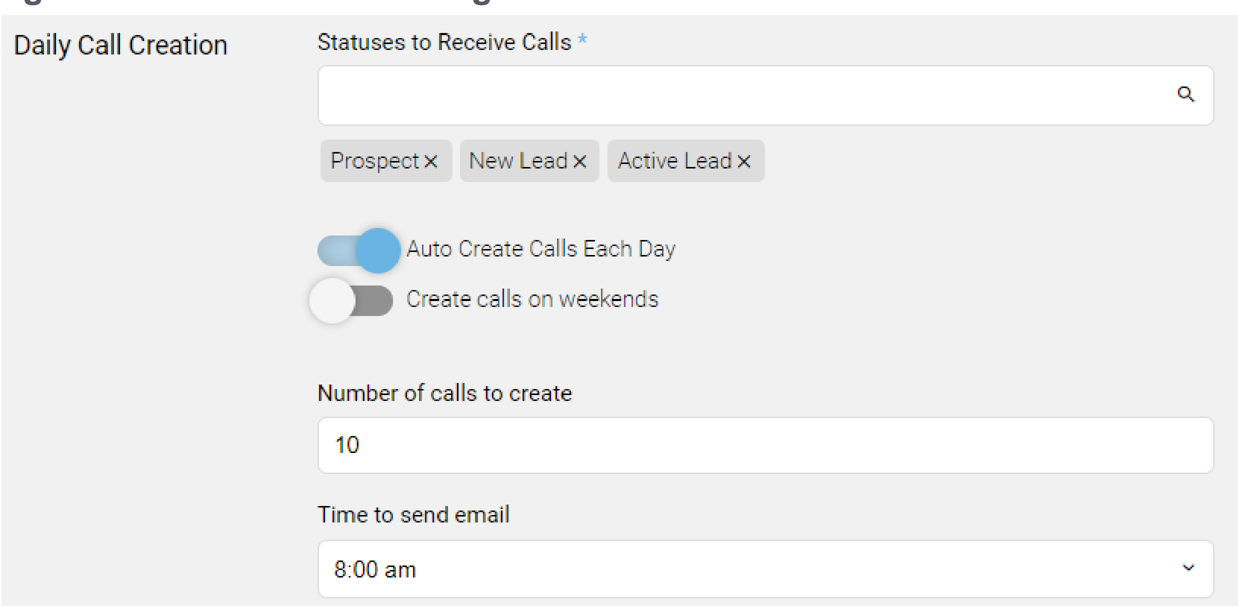
Each day, you will receive an email from kvCORE summarizing your task items and calls. Daily 'calls to make' are also displayed on your dashboard and in your mobile app dialer! These calls are triggered off of events that are set in Smart Campaigns, or from events that your contacts will trigger as they use your website (like if they saved a listing!).
For more information on the mobile app, click here.

How to Set Up Daily Calls

To set up your daily call parameters, access your agent profile settings from the dropdown menu. Then click 'Settings'.



Using these settings you can alter the number of calls the system wants you to make to contacts in your database. There will always be a reason for the phone call that you will see on your screen before you call them that the system is watching out for 24/7 on your behalf. The more calls you can handle, the better your conversion rate from leads into clients will be! Although the settings below can be adjusted, it's recommended that new Agents use the default settings.



Disclaimer: These are calls that are designed to be managed by the Agent and these are reminder calls that the kvCORE system DOES NOT make the

call but the Agent does. *The scheduled calls are a reminder for the agent to complete.*

Frequently Asked Questions

Which contacts are daily calls created for?

By default contacts must fall into the following criteria:

- Not 'Archive,' 'Closed,' or 'Contract' status.
    - This is the only criteria of the 3 that can be updated. You can add or remove which statuses you would like daily calls created for from the settings in your profile.
- Not Unsubscribed.
- Have a phone number.

What conditions must be true for a call to be created?

- The contact may not have a 'missed' call that was previously auto-created as a daily call. Manually scheduled calls do NOT count towards this.
- You must be below the limit for the maximum number of calls created already for the day. (This is configured here.)

What conditions (regarding the contact) trigger calls?

The system will iterate through the following rules until your daily call limit has been reached.

1. Contact has triggered a behavior in the last 24hrs, and not been called in the past week
2. Contact has viewed a property in the last 6 months, and not called in the past 30 days
3. Contact was created in last 90 days, and not called in past 30 days

4. Contact has never been called (prioritized by age), and not called in the past 30 days
5. Contact has a rating of 3 stars or more and has not called in the past 30 days
6. Contact has responded to a text and has not been called in the past 30 days

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How to Set Your Email Signature

Email signatures are the best way to represent yourself in each and every email you send out, in kvCORE or otherwise. Think of it almost as a business card that sends with every communication to your contacts. If you do not already have a signature they are pretty quick to create and only need to follow a few guidelines:

- **It should identify you and your business/brokerage.**

  TIP: Adding a logo, either yours or your brokerage's (or both), is also a great aspect to include. Pictures are more memorable and quickly recognized versus just plain text names.
- **It should include direct ways to contact you.**
- **It should link to your kvCORE website.**

You can also add links to your social media and legal disclaimers, but remember to keep the signature easy to read; too many icons, colors, or text can overwhelm the receiver or even get caught in a spam filter! Simple and elegant is what you want to aim for.

DELANEY MANNING
Content Specialist
INSIDE REAL ESTATE

manningd@insiderealestate.com
O: | M: (760) 205-2289
www.insiderealestate.com

inside real estate

Check out the NEW Learning Portal in your account dashboard
Visit the Support Portal for articles, videos and more

This is a great example that incorporates all the suggested features while staying succinct and visually easy on the eyes.

Once you have your desired signature created, you can copy/paste it into your kvCORE profile or save time by creating the signature in kvCORE at the beginning.

Adding an HTML Signature in kvCORE

You have the ability to build your signature using HTML if that is something you prefer or if your signature was created by a third party who gave you a block of code to add to your email settings.

Simply click the caret icon along the top of the signature's toolbox to access the source code for that area.

For more information on HTML, [click here](#).

Canadian Agents Only

If you create a unique signature please make sure it follows the exact format that CASL demands to remain in compliance.

Including the Signature in Every Email

Now that you have your signature created and saved in kvCORE, there is a second step you will want to take so that this signature is now sent out at the bottom of each and every email message that is sent from kvCORE. When looking at your profile out of Edit mode you will see a toggle just under your signature. You should toggle this on so that all emails sent from kvCORE automatically include your signature.

This includes Smart Campaign emails, Search Alert notifications, Seller Reports, and every other type of email.
TIP: This profile toggle overrides any other signature toggles that exist in kvCORE. If you have not already toggled on the "Include Signature" option in your Smart Campaign templates, your signature will still send as long as you have the profile toggle enabled.

How Do I Know Which Teams/Offices I'm a Part Of?

From your Profile, the Offices and Teams sections will be visible on the righthand side.

Offices

Office	Role
Implementation	Admin
T3 Support	Admin
Training	Admin
Sales	Admin
Account Management	Admin

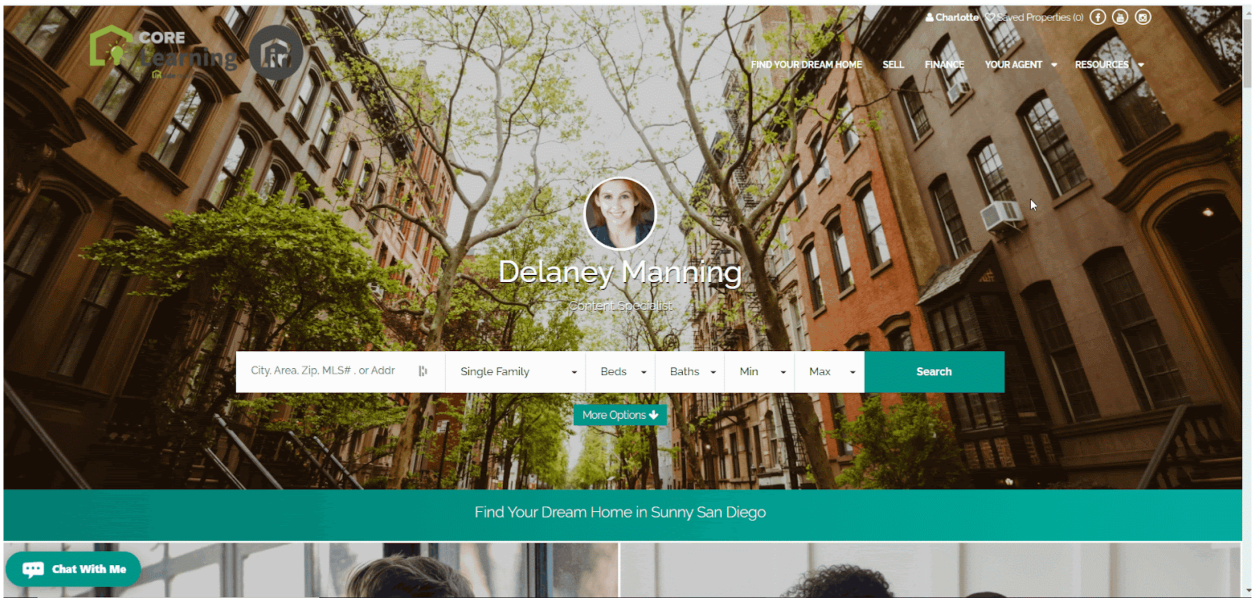
Teams

Team	Role
kvCORE Training Team	Admin

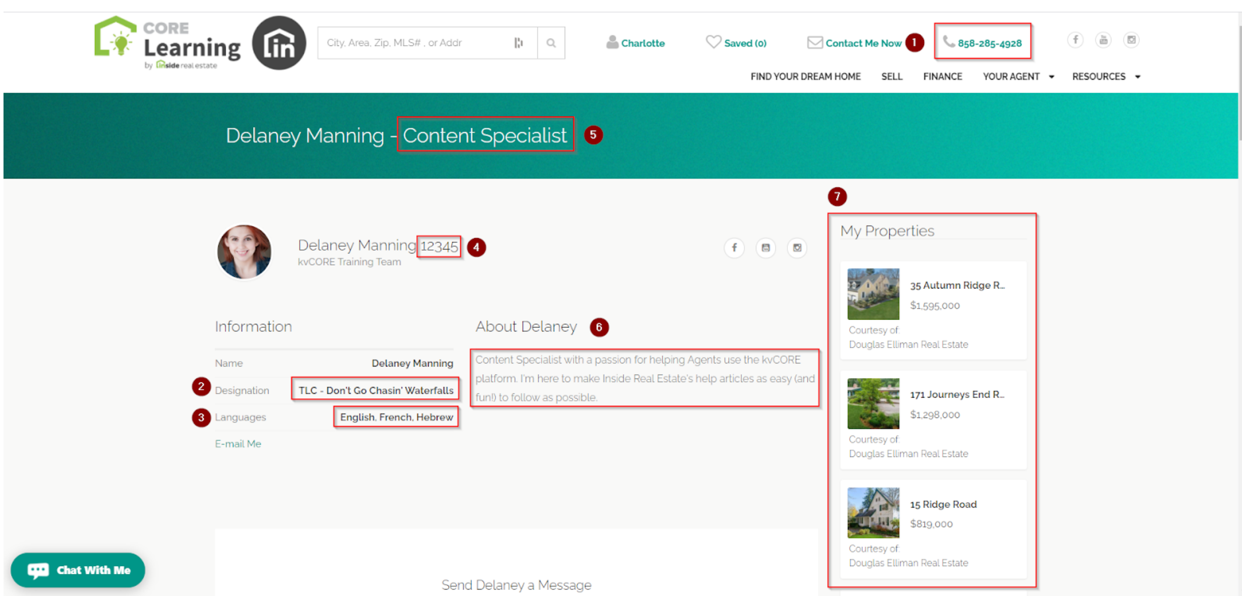
Click on an Office or Team name to see who else is a part of the entity as well! You can also see other important details such as the logo, address, and other contact information your Office or Team is using. This information 'trickles down' to your personal Agent website. Some settings may be changed, but not all of them (such as logo or address.)

Where Does My Profile Information Display?

Your basic profile information integrates with the 'Agent Profile' page on your kvCORE website.
To see your Agent page, navigate to your kvCORE website. Hover over 'Your Agent' and select 'Agent Profile' from the dropdown.

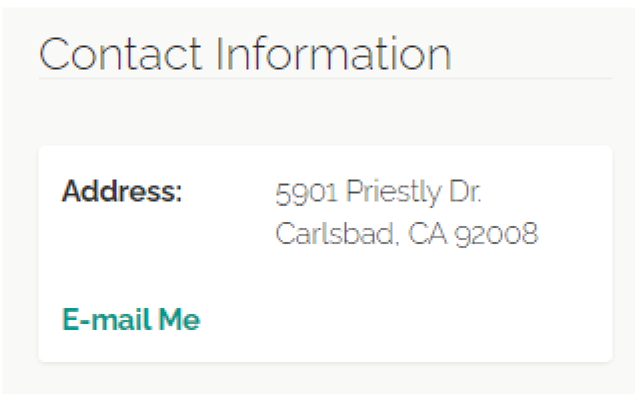


The Agent Profile page will display various information from your profile in kvCORE.



1. **Website Phone Number or kvCORE Smart Number**

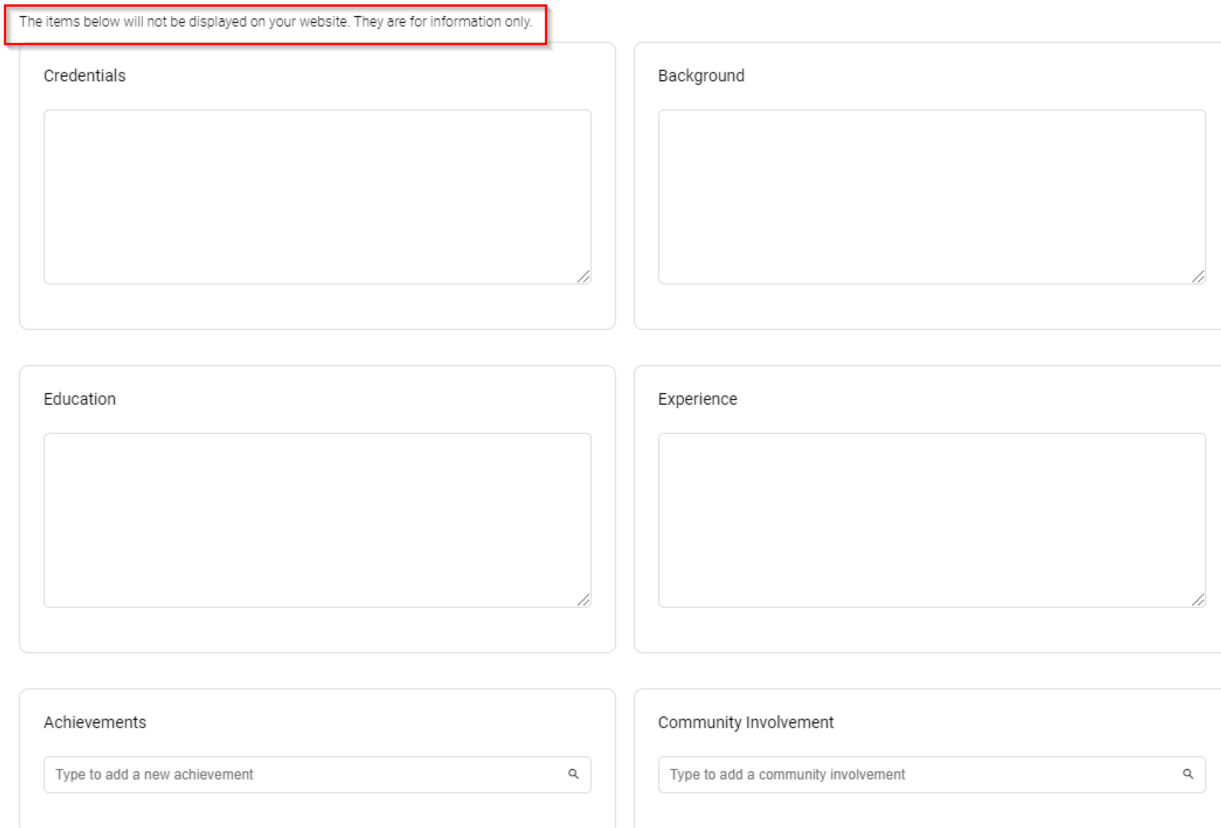
2. Selected Designations
3. Selected Languages
4. License #
5. Position
6. Agent Bio
7. Agent Listings
    - If you do not have any personal listings linked to kvCORE your Office information will be visible.



Extra Fields

Some profile information that may be set on your Agent profile will not show on the front end of your website.
The following fields are for informational purposes only and will not show on your kvCORE website.

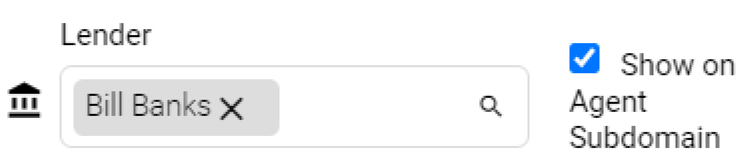
- Credentials
- Background
- Education
- Experience
- Achievements
- Community Involvement



TIP: Build [email templates](#) with this information that you send out to new contacts to show them why you are the best Agent for them! You can even add this to your '[About Me' section](#) to display on the site.

How to Connect Your Lender Partner to Your kvCORE Account

Connecting your preferred Lender to your profile is easy and can bring all aspects of your business together, using the kvCORE platform. Once your Lender is added to your profile their information will display on the 'Finance' page and automatically connect them to your new contacts.
For more information on the 'Finance' page, [click here](#).
From the Profile, you'll see the 'Lender' and 'Show on Agent Subdomain' sections.



If you work with a specific lender, you can choose them from the dropdown. If they are not available please reach out to your Admin for assistance! Brokers or Admins must enter new Lenders into the system where they can log in to manage leads.
Any new leads you generate after adding them to your profile will be assigned to this Lender in their dashboard.
Co-Marketing Strategies & Tactics For Getting Your Lender Involved

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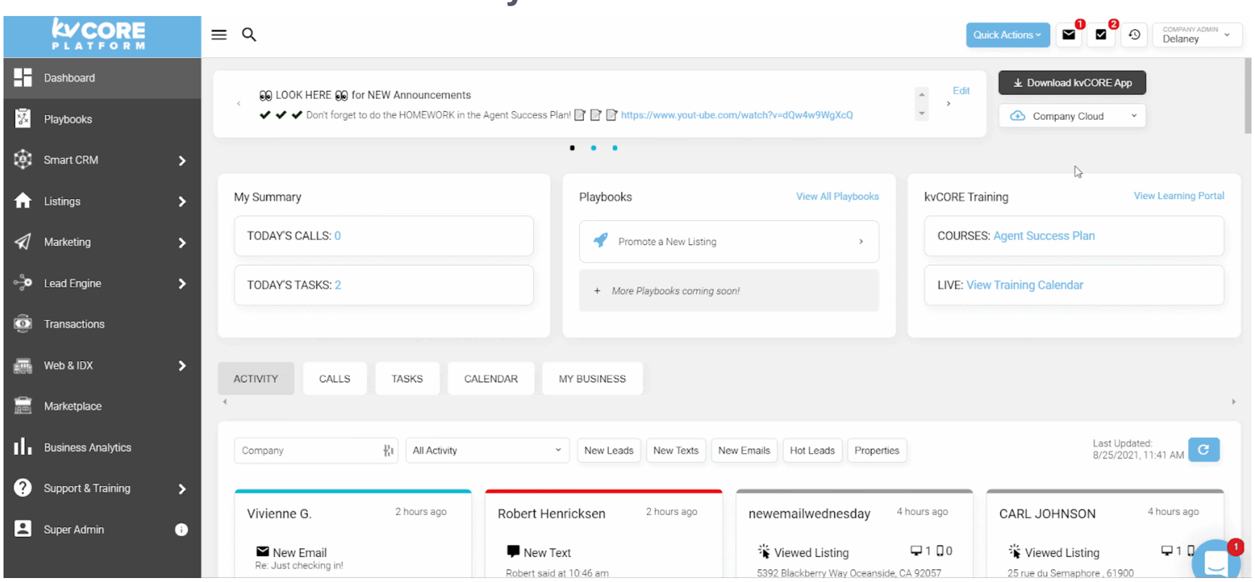
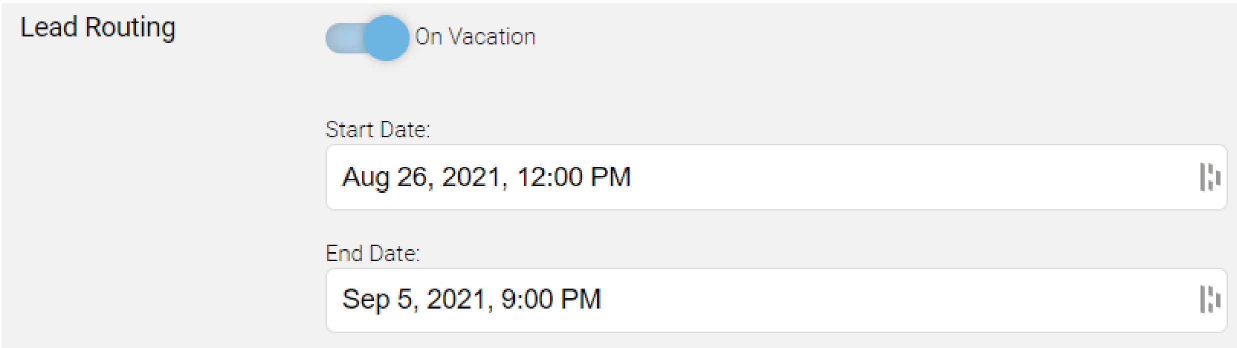
Setting Yourself on Vacation Mode

The vacation mode in kvCORE prevents new leads from being assigned to you that you would be expected to work/reply to.
Please Note: Leads that come through on your personal Agent website or through your advertising will still be sent to your CRM. Setting your profile on vacation is only applicable for leads that are assigned to you via your Team, Office, or Company.
To go on vacation, access your Agent profile settings.
Open your menu from the upper right corner of the dashboard. Then select 'My Profile. Click the 'Settings' button on the top right and toggle 'On Vacation' on. You can then set your dates and save them!





Please Note: If you set no end date, vacation mode will stay on until you turn it off. If you choose no start date, then vacation mode starts when you save your changes at the bottom.

TIP: This is important because if you are expected to follow up with leads that are given to you by your agency, you could be held accountable for those follow-ups while you're away! You may want to log in quickly each day and snooze your calls and tasks or work out coverage with another Agent to assist you with that while you're out.

Related Content

[kvCORE - Video] How to Set Up Your Profile and Configure Your Email Signature

About the Lender Info & Finance Page On Your Website

Have more questions? Please reach out to Customer Support via the blue chat bubble to the right or by emailing kvcore@insiderealestate.com

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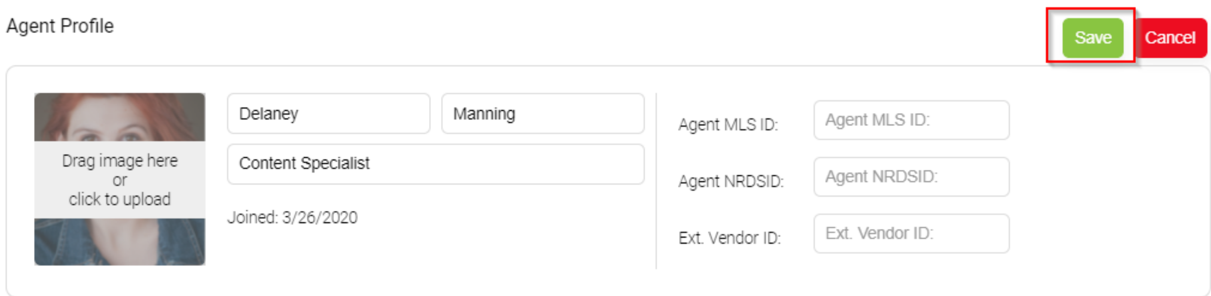

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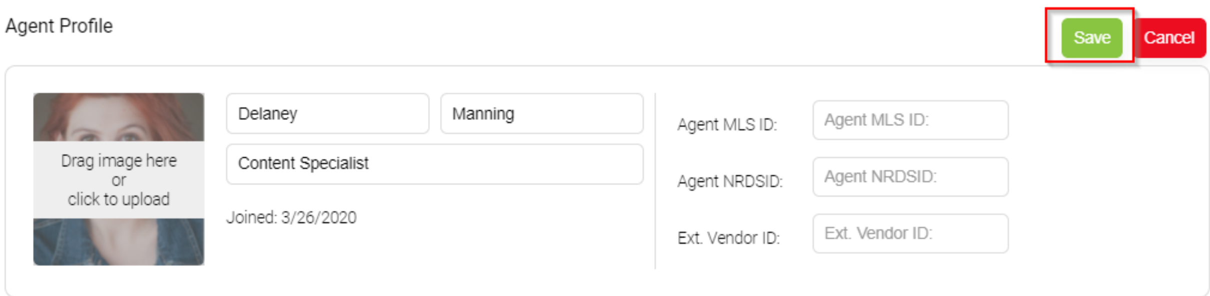

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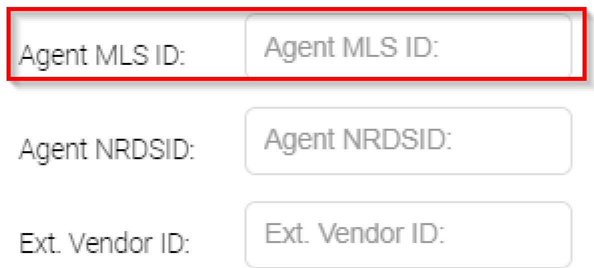
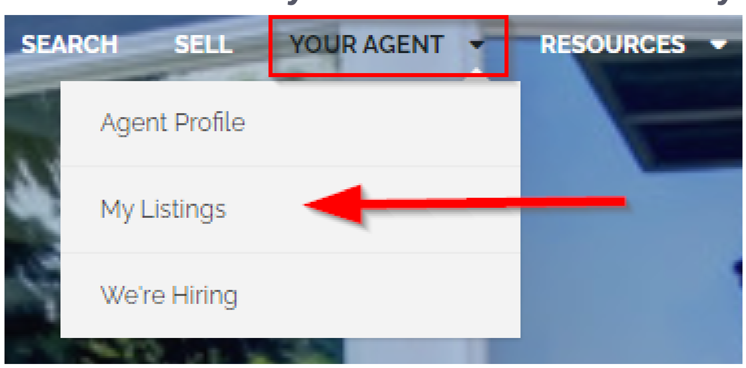
Please Note: New listings you add to the MLS are updated as fast as possible in kvCORE. Many MLS's will update within 30 minutes and the majority of MLS's will update every hour. If your listing has not been updated within 24 hours please reach out to Support at kvcore@insiderealestate.com.

If you have multiple MLS IDs add them separated with a comma and no spaces.



After your ID is added, your listings and the listings you are a Co-Agent on will be shown on your website within the 'My Listings' tab.



This menu is also where your manually added exclusive, coming soon, or sold listings will populate.
Please Note: If your listings are not showing on your kvCORE please make sure through your MLS that you have allowed the Listing(s) to be shared to the IDX, other methods would be to verify the Listing has been Shared to the Internet or the listing is Active.

How to Add Your Personal Listings to Your Website

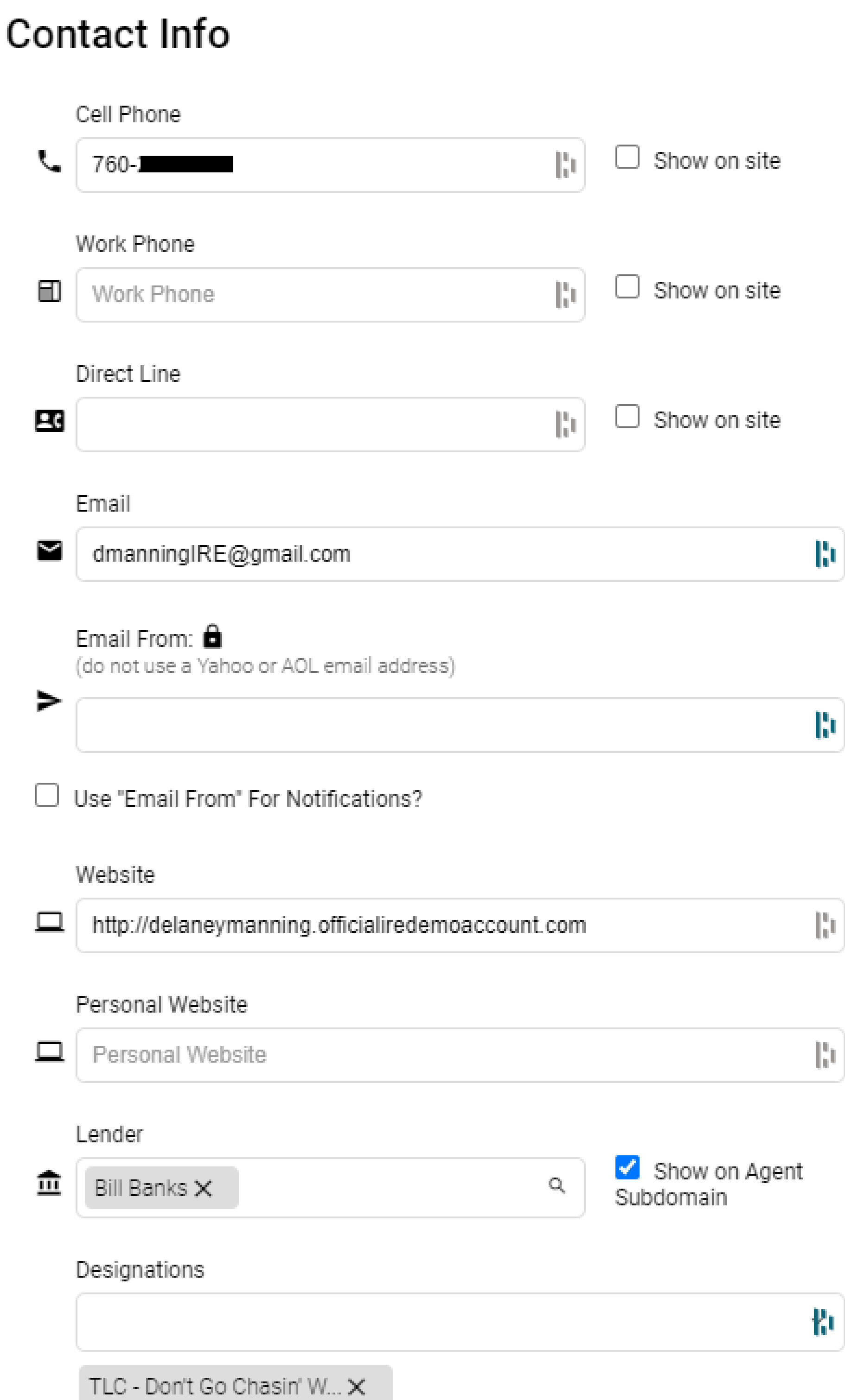
Agent NRDSID

Your NRDS ID is required for some SSO and API connections with kvCORE. If you use an SSO that requires an NRDS ID insert it into this field.

Current requirements:

- *Form Simplicity*

Click Here if you need to find your NRDS ID.
Ext. Vendor ID
If you need an external vendor ID it will be given to you by your brokerage. If you're you're unsure if you need an external vendor ID please reach out to your Broker for assistance.
Contact Info


Contact Info
Cell Phone
760-[redacted]
Show on site
Work Phone
Work Phone
Show on site
Direct Line
Show on site
Email
dmanningIRE@gmail.com
Email From:
(do not use a Yahoo or AOL email address)
Use "Email From" For Notifications?
Website
http://delaneymanning.officialiredemoaccount.com
Personal Website
Personal Website
Lender
Bill Banks
Show on Agent Subdomain
Designations
TLC - Don't Go Chasin' W...

Cell Phone

Your cell number. This is the number that will be connected to your Smart Number. To learn more about your Smart Number, click here. This number will not be visible to your contacts if the 'Show on Site' is not checked.
Work Phone
Your work number. This number will not be visible to your contacts if the 'Show on Site' is not checked.
Direct Line
Your direct line. This number will not be visible to your contacts if the 'Show on Site' is not checked.
Phone 'Show on Site' Checkbox
When checked, this replaces the shared Smart Number on your website with the selected number. Please Note: Only one number can be checked at a time.

How to Show Your Personal Number on Your Website Instead of Your Smart Number

Email
The email used to log into kvCORE.
Please Note: If you change this email in your profile it will change the email you need to use to log in.
Keep in mind that some accounts may not be able to change the 'email' setting unless they are an Administrator. If you would like to change your email in this case, reach out to your Admin for assistance.
Disclaimer: DO NOT use an email associated with AOL or Yahoo as they often do not work correctly with kvCORE tools and could be flagged as spam.
Important: Gmail Addresses (or emails that don't match your kvCORE website domain.) It's a known challenge with Google that if you are sending from an "@gmail.com" address in kvCORE, some email providers will drop it into spam (but not always). Make sure the email address you use with kvCORE is something professional, preferably something that matches your kvCORE website domain. When an email arrives from a domain that uses an address from a different domain it is treated as malicious or suspicious.
Email From (Vanity Email)

This email will show on the emails that are sent from kvCORE. All of your campaigns and listings you send out will show as being 'from' this address.

Use "Email From" For Notifications Checkbox

If this box is checked, you will receive system communications (like New Lead emails) to the 'Email From' email address.

Website

Your actual website that is created when you're added to the kvCORE system. It does not auto-update if you purchase a Vanity Domain or change the subdomain - it will need to be manually updated.

Personal Website

This is ONLY if you are using the Foundation template.

Please Note: Foundation is InsideRE's legacy template - there is no plan for updates (i.e. ADA Compliance).

Lender

You can select your preferred Lender from this section.

Lender 'Show on Agent Subdomain' Checkbox

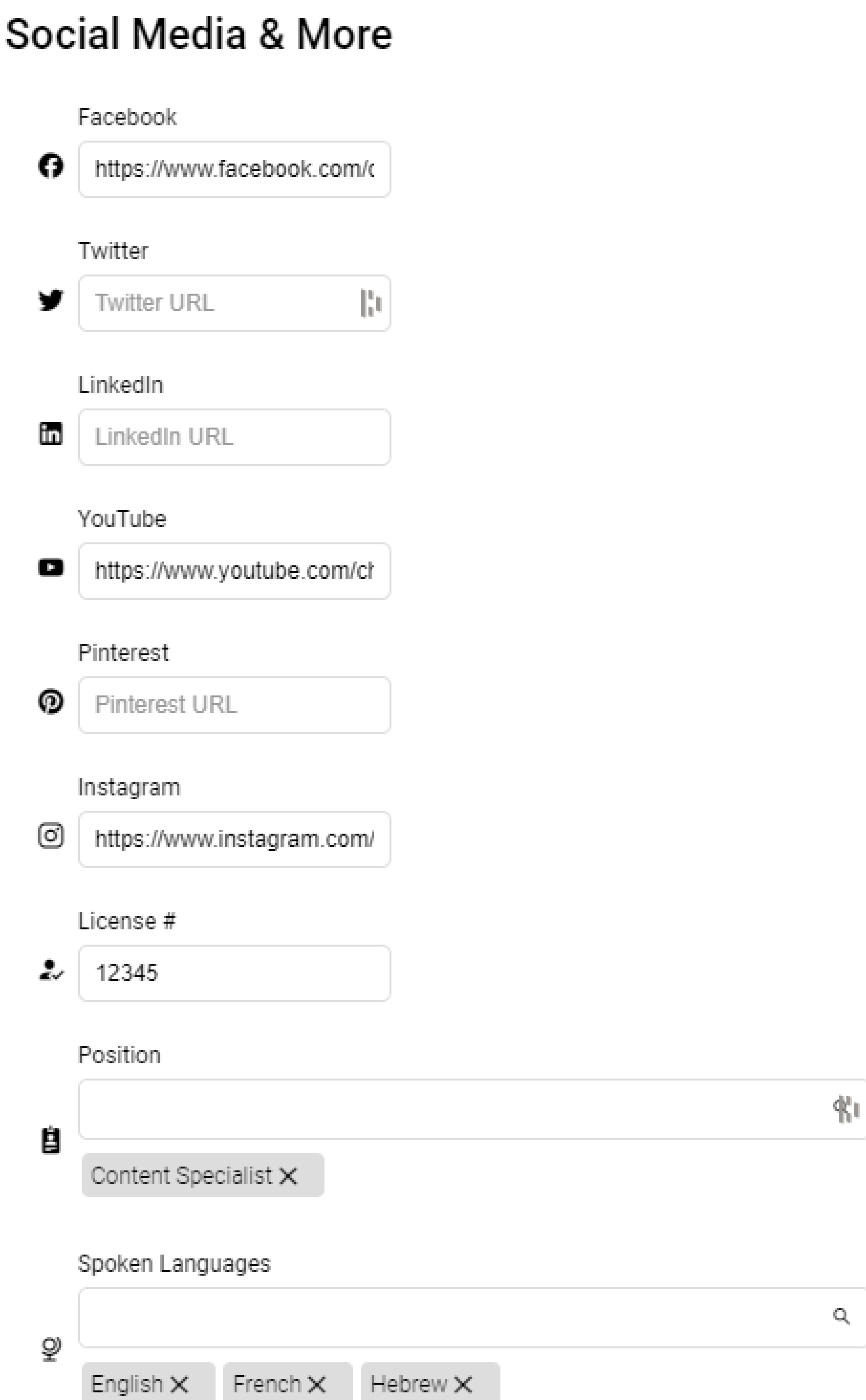
With a preferred Lender chosen in your profile you can trigger the 'Finance' page to show on your site by checking the 'Show on Agent Subdomain' box.

To learn more about the Finance page, click here.

Designations

You can use the Designations section to add any credentials you wish to display on the 'Agent Profile' tab on your website or on your Office/Team/Company Agent Roster.

Social Media & More



Social Media Links

You can add a link to your Facebook, Twitter, YouTube, Pinterest, and Instagram here. These will be displayed on your website for your contacts to click and find your social media pages.

License #

Here you can add your license number. This will be displayed on the 'Agent Profile' page of your website.

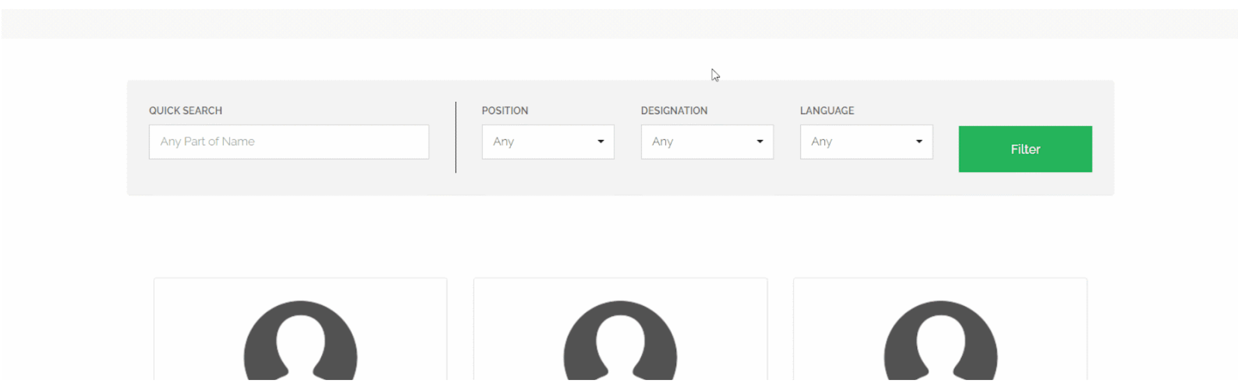
Position

Add your position which will be visible on the 'Agent Profile' page on your website and Agent Roster. Ex: Licensed Realtor, Broker, or Mortgage Advisor

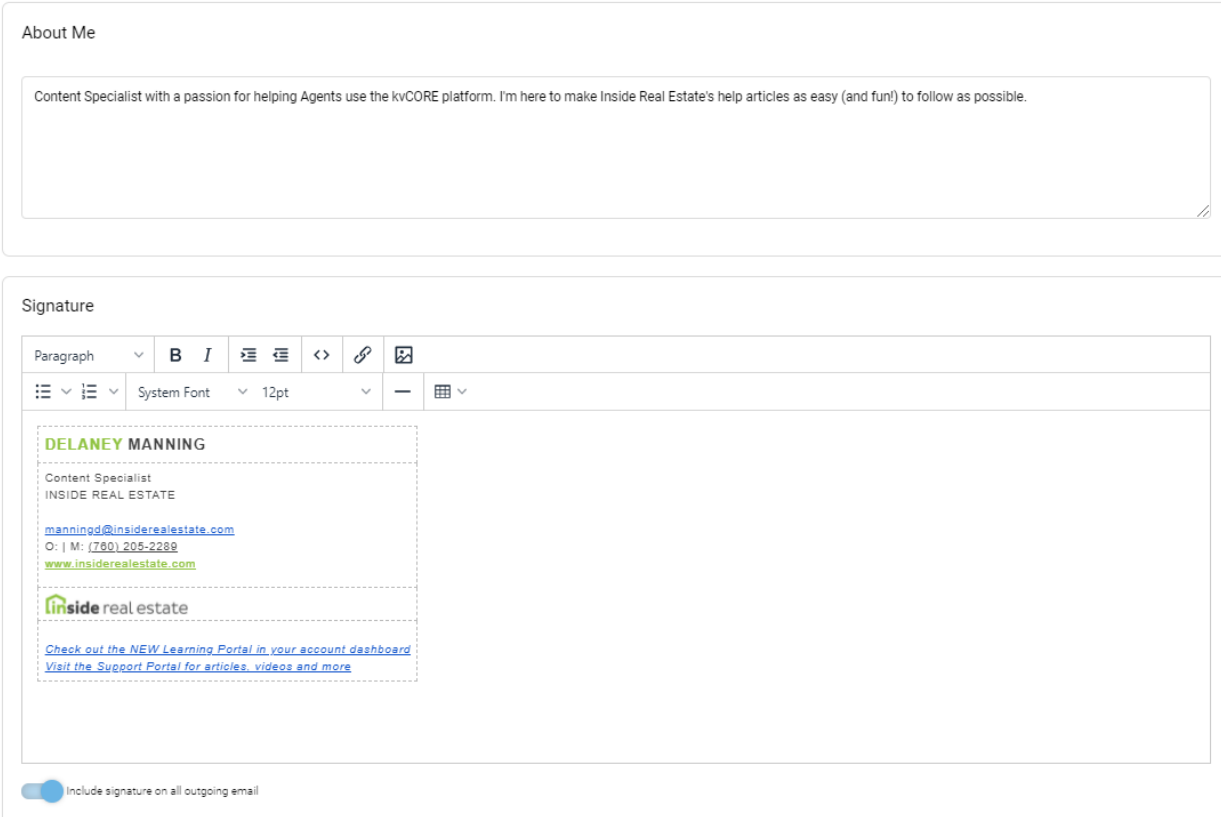
Spoken Languages

Your spoken languages can be added here for your contacts and those viewing your Office/Team/Company Agent Roster page.

Your position, languages spoken, and designations can be used by potential clients to search on Office and Company websites! By filling in as much information about yourself as possible, people can find you by your specializations easily from the sites you're included on, using the 'Agent Roster'.



About Me & Signature



About Me

The section beneath your basic profile info is "About Me." This is the spot for your bio and it shows on the 'Agent Profile' page on your website. You can enter any plain text that you want, or you can use HTML.

How to Customize Your Agent Bio

Signature

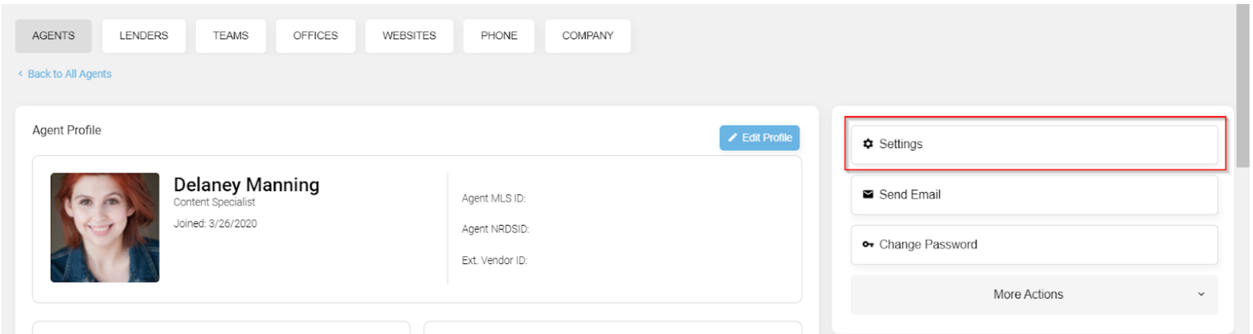
Here you can set your personalized signature which can be automatically added to all emails you send from kvCORE.

Include Signature On All Outgoing Email Toggle

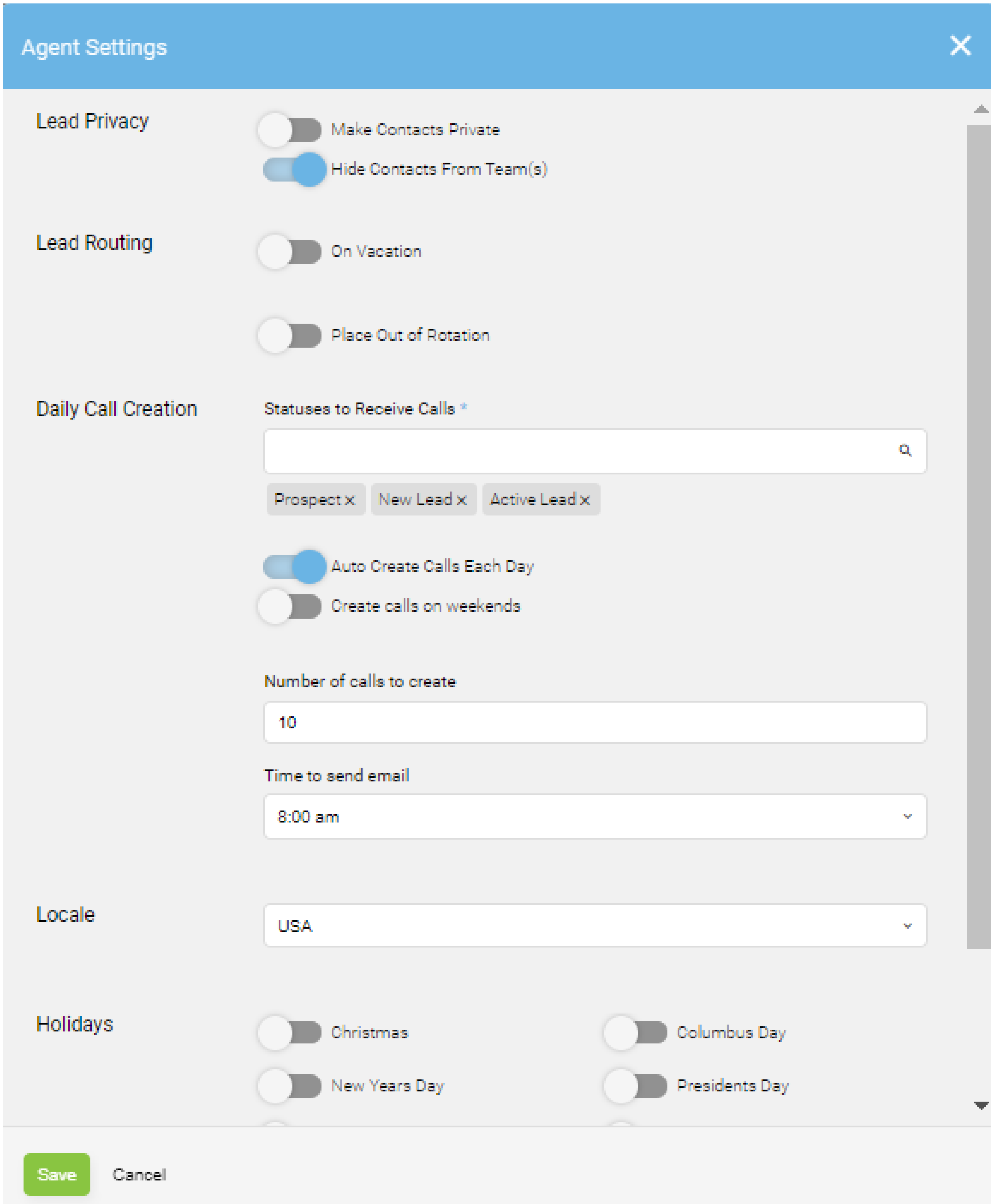
You should toggle this on so that all emails sent from kvCORE automatically include your signature. This includes Smart Campaign emails, Search Alert notifications, Seller Reports, and every other type of email.

Profile Settings

Once you've gotten your basic profile setup, you can access more advanced settings by clicking on the 'Settings' button in your profile. These options allow you to set Lead Routing and Daily Call rules specific to you.



Here, you can enable Lead Privacy, set yourself to 'away' in Vacation mode, adjust your Daily Call Creation settings, and mark 'off' days for specific Holidays.



Lead Privacy

If your Company or Team has enabled lead privacy you can use this toggle to hide your contacts from Admins.

To learn more about lead privacy, click here.

Lead Routing

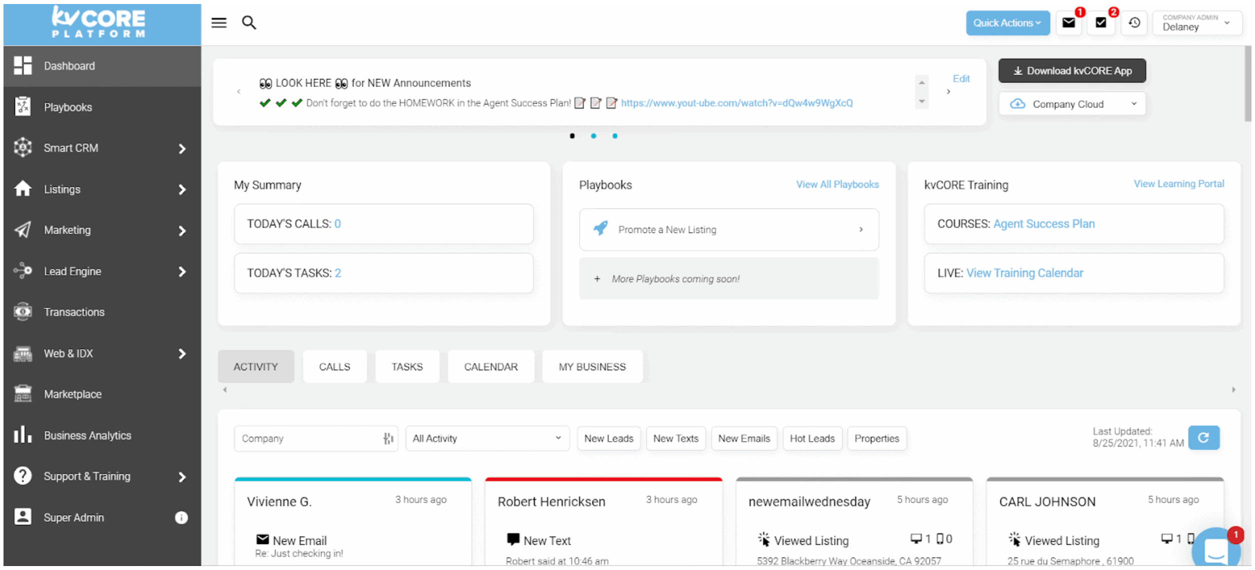
Set your vacation days to stop leads from being routed to you while you're out of the office, or remove yourself from lead rotation.
To learn more about lead rotation, click here.
Daily Call Creation
Daily 'calls to make' are displayed on your dashboard and in your mobile app dialer. These calls are triggered off of events that are set in Smart Campaigns, or from events that your contacts will trigger as they use your website (like if they saved a listing).
To learn more about daily call creation, click here.
Locale
Select either the USA or Canada based on your locale.
Holidays
To make it easier to mark yourself 'Away' for holidays instead of using the Vacation toggle, select the Holidays on which you would not like to receive leads from your Company or Team.

Daily Call Creation

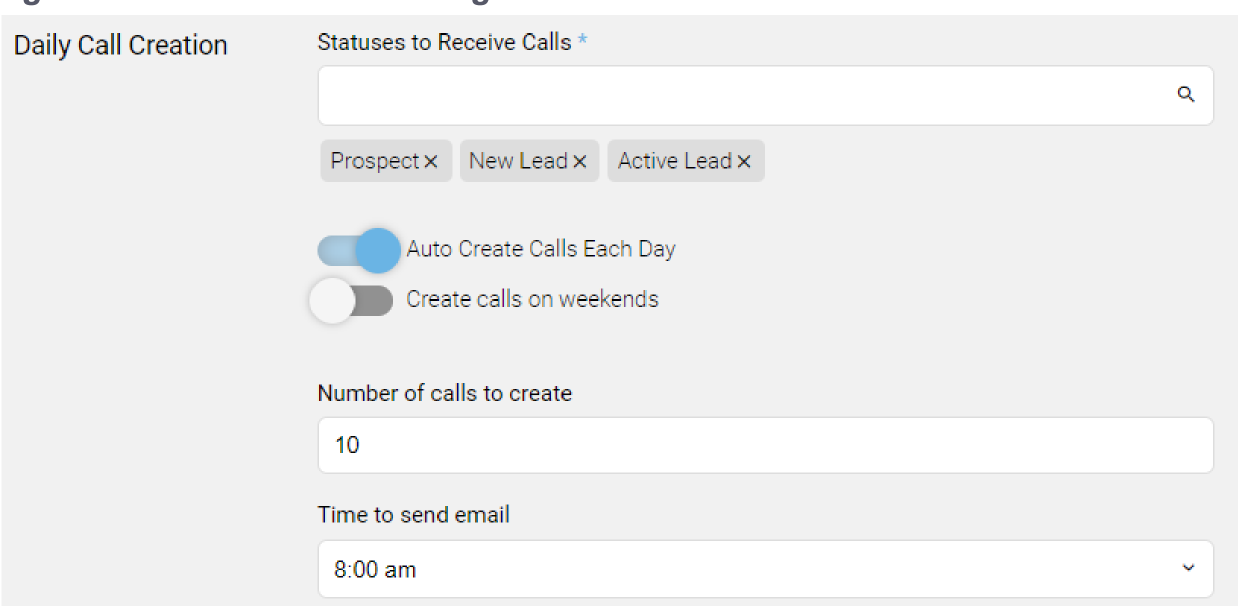
Each day, you will receive an email from kvCORE summarizing your task items and calls. Daily 'calls to make' are also displayed on your dashboard and in your mobile app dialer! These calls are triggered off of events that are set in Smart Campaigns, or from events that your contacts will trigger as they use your website (like if they saved a listing!).
For more information on the mobile app, click here.

How to Set Up Daily Calls

To set up your daily call parameters, access your agent profile settings from the dropdown menu. Then click 'Settings'.



Using these settings you can alter the number of calls the system wants you to make to contacts in your database. There will always be a reason for the phone call that you will see on your screen before you call them that the system is watching out for 24/7 on your behalf. The more calls you can handle, the better your conversion rate from leads into clients will be! Although the settings below can be adjusted, it's recommended that new Agents use the default settings.



Disclaimer: These are calls that are designed to be managed by the Agent and these are reminder calls that the kvCORE system DOES NOT make the

call but the Agent does. The scheduled calls are a reminder for the agent to complete.

Frequently Asked Questions

Which contacts are daily calls created for?

By default contacts must fall into the following criteria:

- ***Not 'Archive,' 'Closed,' or 'Contract' status.***
    - ***This is the only criteria of the 3 that can be updated. You can add or remove which statuses you would like daily calls created for from the settings in your profile.***
- ***Not Unsubscribed.***
- ***Have a phone number.***

What conditions must be true for a call to be created?

- ***The contact may not have a 'missed' call that was previously auto-created as a daily call. Manually scheduled calls do NOT count towards this.***
- ***You must be below the limit for the maximum number of calls created already for the day. (This is configured here.)***

What conditions (regarding the contact) trigger calls?

The system will iterate through the following rules until your daily call limit has been reached.

1. ***Contact has triggered a behavior in the last 24hrs, and not been called in the past week***
2. ***Contact has viewed a property in the last 6 months, and not called in the past 30 days***
3. ***Contact was created in last 90 days, and not called in past 30 days***

4. ***Contact has never been called (prioritized by age), and not called in the past 30 days***
5. ***Contact has a rating of 3 stars or more and has not called in the past 30 days***
6. ***Contact has responded to a text and has not been called in the past 30 days***

How to Set Your Email Signature

Email signatures are the best way to represent yourself in each and every email you send out, in kvCORE or otherwise. Think of it almost as a business card that sends with every communication to your contacts. If you do not already have a signature they are pretty quick to create and only need to follow a few guidelines:

- ***It should identify you and your business/brokerage.***

  TIP: Adding a logo, either yours or your brokerage's (or both), is also a great aspect to include. Pictures are more memorable and quickly recognized versus just plain text names.
- ***It should include direct ways to contact you.***
- ***It should link to your kvCORE website.***

You can also add links to your social media and legal disclaimers, but remember to keep the signature easy to read; too many icons, colors, or text can overwhelm the receiver or even get caught in a spam filter! Simple and elegant is what you want to aim for.

DELANEY MANNING
Content Specialist
INSIDE REAL ESTATE

manningd@insiderealestate.com
O: | M: (760) 205-2289
www.insiderealestate.com

Check out the NEW Learning Portal in your account dashboard
Visit the Support Portal for articles, videos and more

This is a great example that incorporates all the suggested features while staying succinct and visually easy on the eyes.

Once you have your desired signature created, you can copy/paste it into your kvCORE profile or save time by creating the signature in kvCORE at the beginning.

Adding an HTML Signature in kvCORE

You have the ability to build your signature using HTML if that is something you prefer or if your signature was created by a third party who gave you a block of code to add to your email settings.

Simply click the caret icon along the top of the signature's toolbox to access the source code for that area.

For more information on HTML, [click here](#).

Canadian Agents Only

If you create a unique signature please make sure it follows the exact format that CASL demands to remain in compliance.

Including the Signature in Every Email

Now that you have your signature created and saved in kvCORE, there is a second step you will want to take so that this signature is now sent out at the bottom of each and every email message that is sent from kvCORE. When looking at your profile out of Edit mode you will see a toggle just under your signature. You should toggle this on so that all emails sent from kvCORE automatically include your signature.

This includes Smart Campaign emails, Search Alert notifications, Seller Reports, and every other type of email.
TIP: This profile toggle overrides any other signature toggles that exist in kvCORE. If you have not already toggled on the "Include Signature" option in your Smart Campaign templates, your signature will still send as long as you have the profile toggle enabled.

How Do I Know Which Teams/Offices I'm a Part Of?

From your Profile, the Offices and Teams sections will be visible on the righthand side.

Offices

Office	Role
Implementation	Admin
T3 Support	Admin
Training	Admin
Sales	Admin
Account Management	Admin

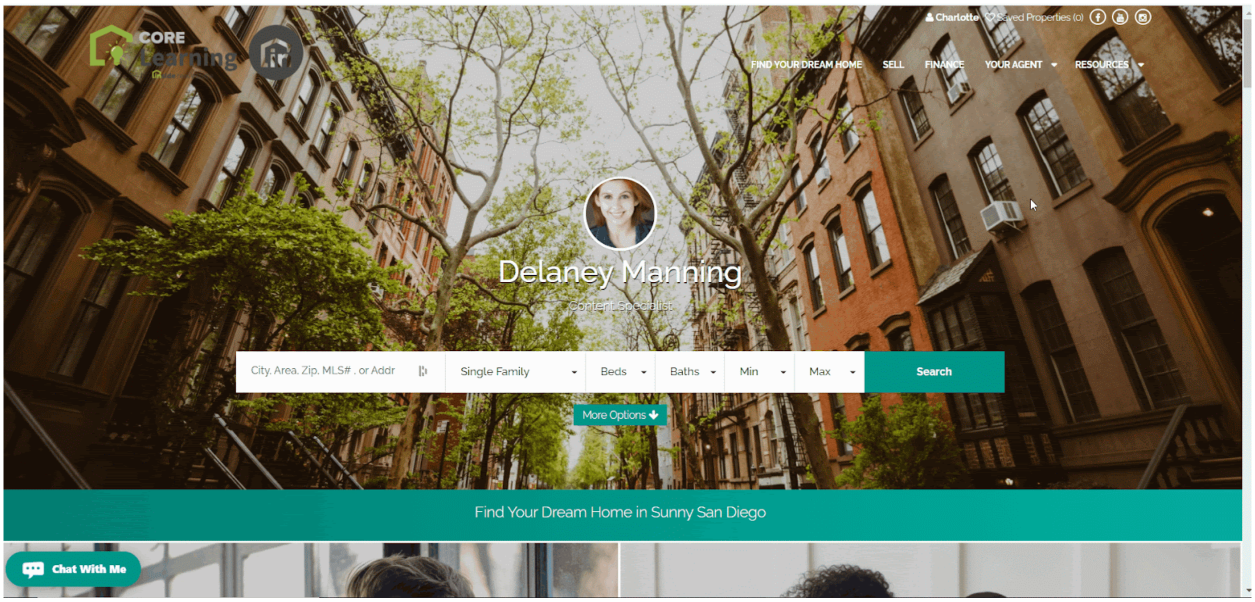
Teams

Team	Role
kvCORE Training Team	Admin

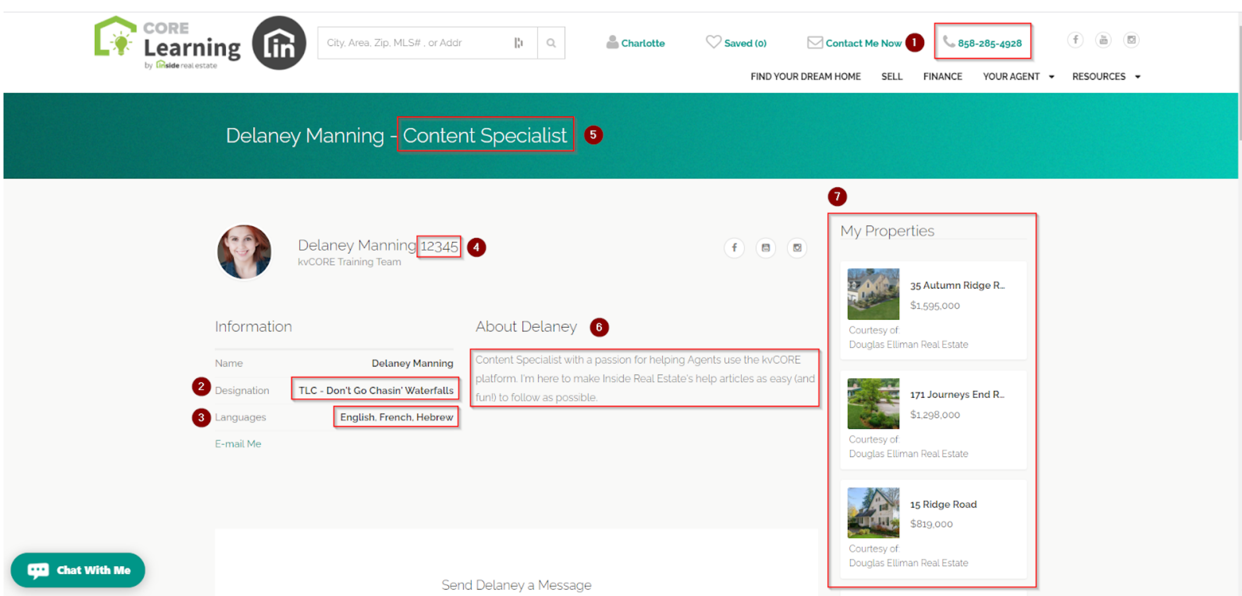
Click on an Office or Team name to see who else is a part of the entity as well! You can also see other important details such as the logo, address, and other contact information your Office or Team is using. This information 'trickles down' to your personal Agent website. Some settings may be changed, but not all of them (such as logo or address.)

Where Does My Profile Information Display?

Your basic profile information integrates with the 'Agent Profile' page on your kvCORE website.
To see your Agent page, navigate to your kvCORE website. Hover over 'Your Agent' and select 'Agent Profile' from the dropdown.

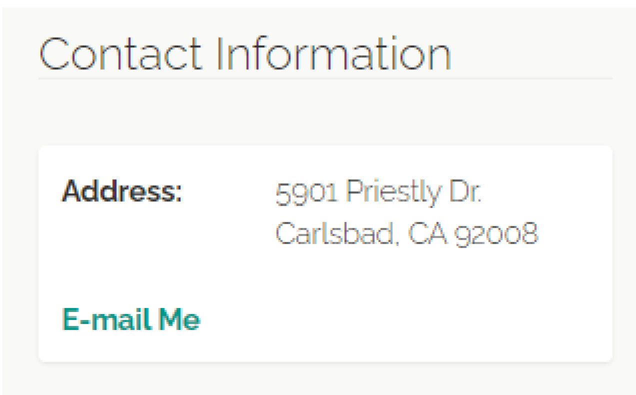


The Agent Profile page will display various information from your profile in kvCORE.



1. ***Website Phone Number or kvCORE Smart Number***

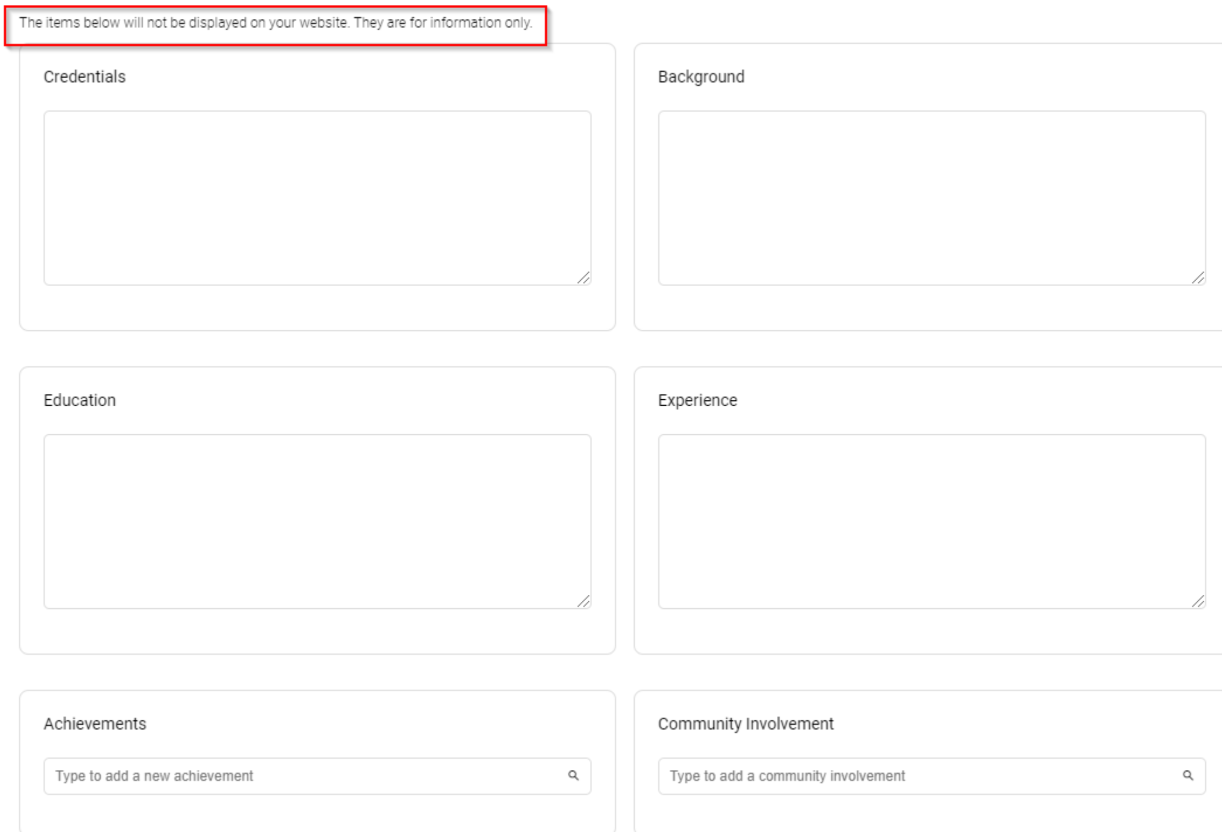
2. *Selected Designations*
3. *Selected Languages*
4. *License #*
5. *Position*
6. *Agent Bio*
7. *Agent Listings*
    - *If you do not have any personal listings linked to kvCORE your Office information will be visible.*



Extra Fields

Some profile information that may be set on your Agent profile will not show on the front end of your website.
The following fields are for informational purposes only and will not show on your kvCORE website.

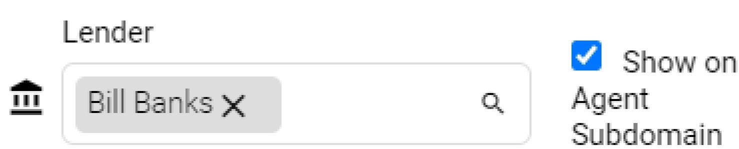
- ***Credentials***
- ***Background***
- ***Education***
- ***Experience***
- ***Achievements***
- ***Community Involvement***



TIP: Build [email templates]() with this information that you send out to new contacts to show them why you are the best Agent for them! You can even add this to your '[About Me' section]() to display on the site.

How to Connect Your Lender Partner to Your kvCORE Account

Connecting your preferred Lender to your profile is easy and can bring all aspects of your business together, using the kvCORE platform. Once your Lender is added to your profile their information will display on the 'Finance' page and automatically connect them to your new contacts.
For more information on the 'Finance' page, [click here]().
From the Profile, you'll see the 'Lender' and 'Show on Agent Subdomain' sections.



If you work with a specific lender, you can choose them from the dropdown. If they are not available please reach out to your Admin for assistance! Brokers or Admins must enter new Lenders into the system where they can log in to manage leads.
Any new leads you generate after adding them to your profile will be assigned to this Lender in their dashboard.
Co-Marketing Strategies & Tactics For Getting Your Lender Involved

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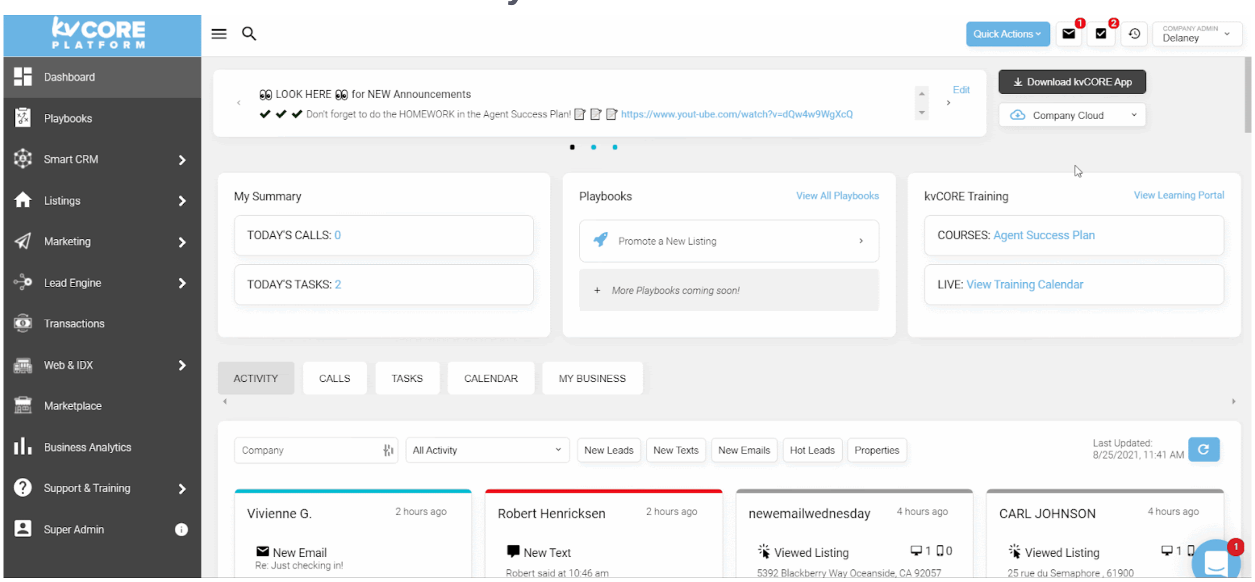
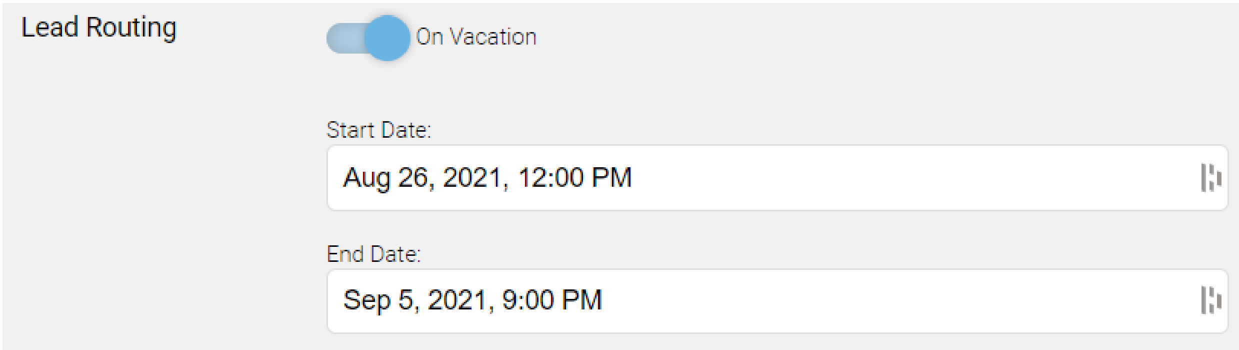
Setting Yourself on Vacation Mode

The vacation mode in kvCORE prevents new leads from being assigned to you that you would be expected to work/reply to.
Please Note: Leads that come through on your personal Agent website or through your advertising will still be sent to your CRM. Setting your profile on vacation is only applicable for leads that are assigned to you via your Team, Office, or Company.
To go on vacation, access your Agent profile settings.
Open your menu from the upper right corner of the dashboard. Then select 'My Profile. Click the 'Settings' button on the top right and toggle 'On Vacation' on. You can then set your dates and save them!





Please Note: If you set no end date, vacation mode will stay on until you turn it off. If you choose no start date, then vacation mode starts when you save your changes at the bottom.

TIP: This is important because if you are expected to follow up with leads that are given to you by your agency, you could be held accountable for those follow-ups while you're away! You may want to log in quickly each day and snooze your calls and tasks or work out coverage with another Agent to assist you with that while you're out.

Related Content

[kvCORE - Video] How to Set Up Your Profile and Configure Your Email Signature

About the Lender Info & Finance Page On Your Website

Have more questions? Please reach out to Customer Support via the blue chat bubble to the right or by emailing kvcore@insiderealestate.com

Agent MLS ID

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Please Note: New listings you add to the MLS are updated as fast as possible in kvCORE. Many MLS's will update within 30 minutes and the majority of MLS's will update every hour. If your listing has not been updated within 24 hours please reach out to Support at kvcore@insiderealestate.com.

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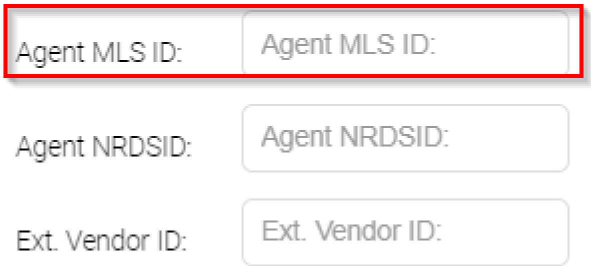
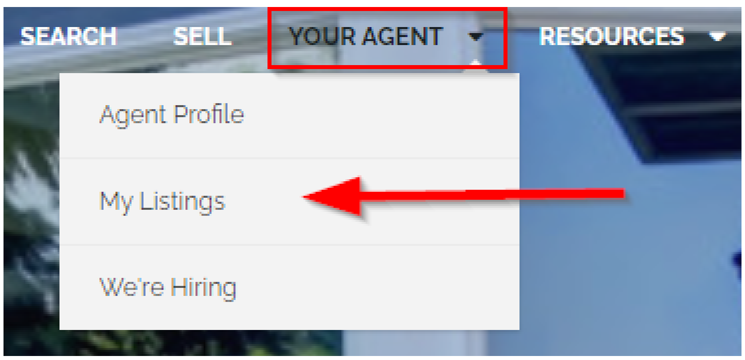


After your ID is added, your listings and the listings you are a Co-Agent on will be shown on your website within the 'My Listings' tab.



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Current requirements:

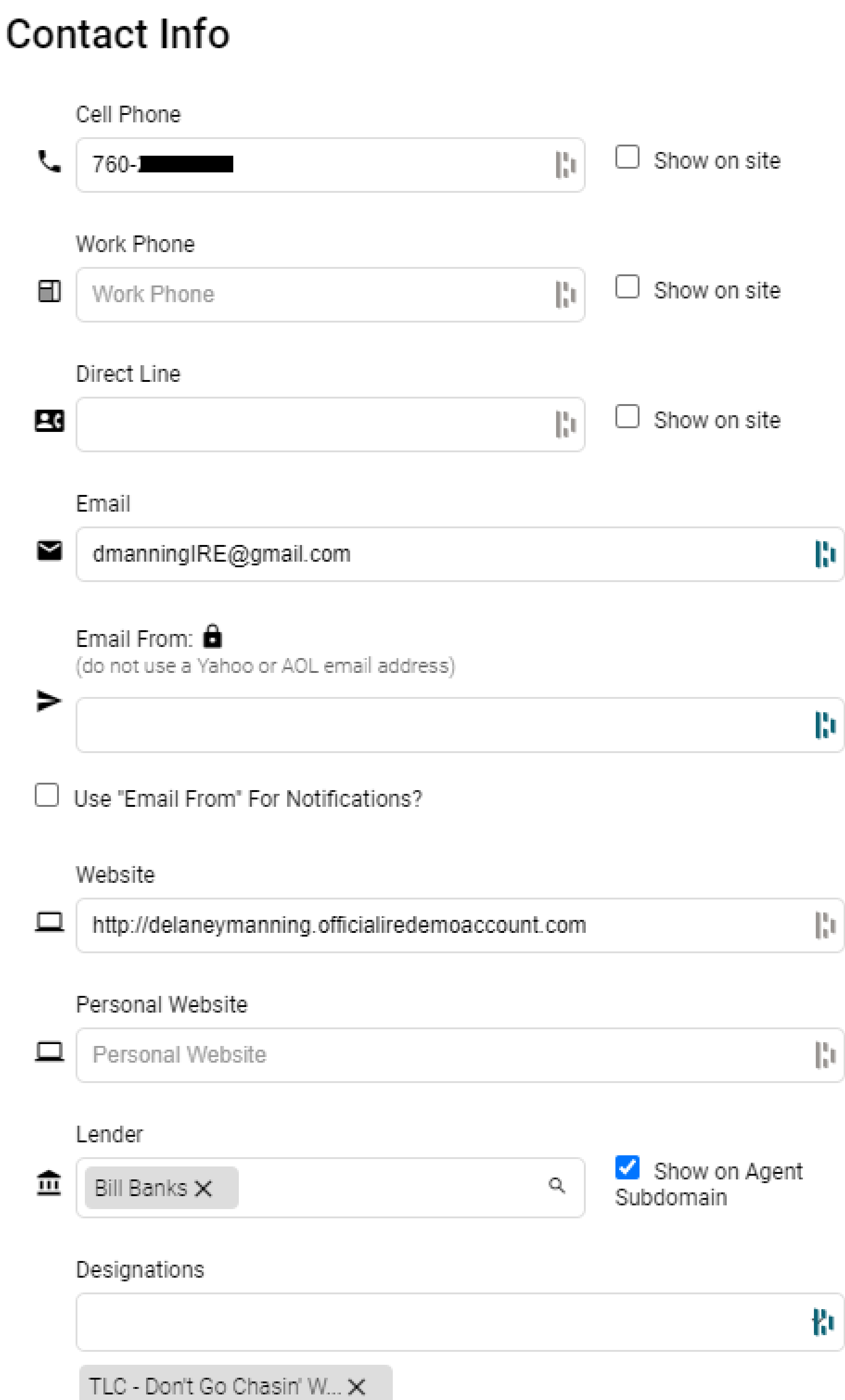
- Form Simplicity

Click Here if you need to find your NRDS ID.

Ext. Vendor ID

If you need an external vendor ID it will be given to you by your brokerage. If you're you're unsure if you need an external vendor ID please reach out to your Broker for assistance.

Contact Info


Contact Info
Cell Phone
760-[redacted]
Show on site
Work Phone
Work Phone
Show on site
Direct Line
Show on site
Email
dmanningIRE@gmail.com
Email From:
(do not use a Yahoo or AOL email address)
Use "Email From" For Notifications?
Website
http://delaneymanning.officialiredemoaccount.com
Personal Website
Personal Website
Lender
Bill Banks
Show on Agent Subdomain
Designations
TLC - Don't Go Chasin' W...

Cell Phone

Your cell number. This is the number that will be connected to your Smart Number. *To learn more about your Smart Number, click here.* This number will not be visible to your contacts if the 'Show on Site' is not checked.

Work Phone

Your work number. This number will not be visible to your contacts if the 'Show on Site' is not checked.

Direct Line

Your direct line. This number will not be visible to your contacts if the 'Show on Site' is not checked.

Phone 'Show on Site' Checkbox

When checked, this replaces the shared Smart Number on your website with the selected number. Please Note: Only one number can be checked at a time.

How to Show Your Personal Number on Your Website Instead of Your Smart Number

Email

The email used to log into kvCORE.

Please Note: If you change this email in your profile it will change the email you need to use to log in.

Keep in mind that some accounts may not be able to change the 'email' setting unless they are an Administrator. If you would like to change your email in this case, reach out to your Admin for assistance.

Disclaimer: DO NOT use an email associated with AOL or Yahoo as they often do not work correctly with kvCORE tools and could be flagged as spam.

Important: Gmail Addresses (or emails that don't match your kvCORE website domain.) It's a known challenge with Google that if you are sending from an "@gmail.com" address in kvCORE, some email providers will drop it into spam (but not always). Make sure the email address you use with kvCORE is something professional, preferably something that matches your kvCORE website domain. When an email arrives from a domain that uses an address from a different domain it is treated as malicious or suspicious.

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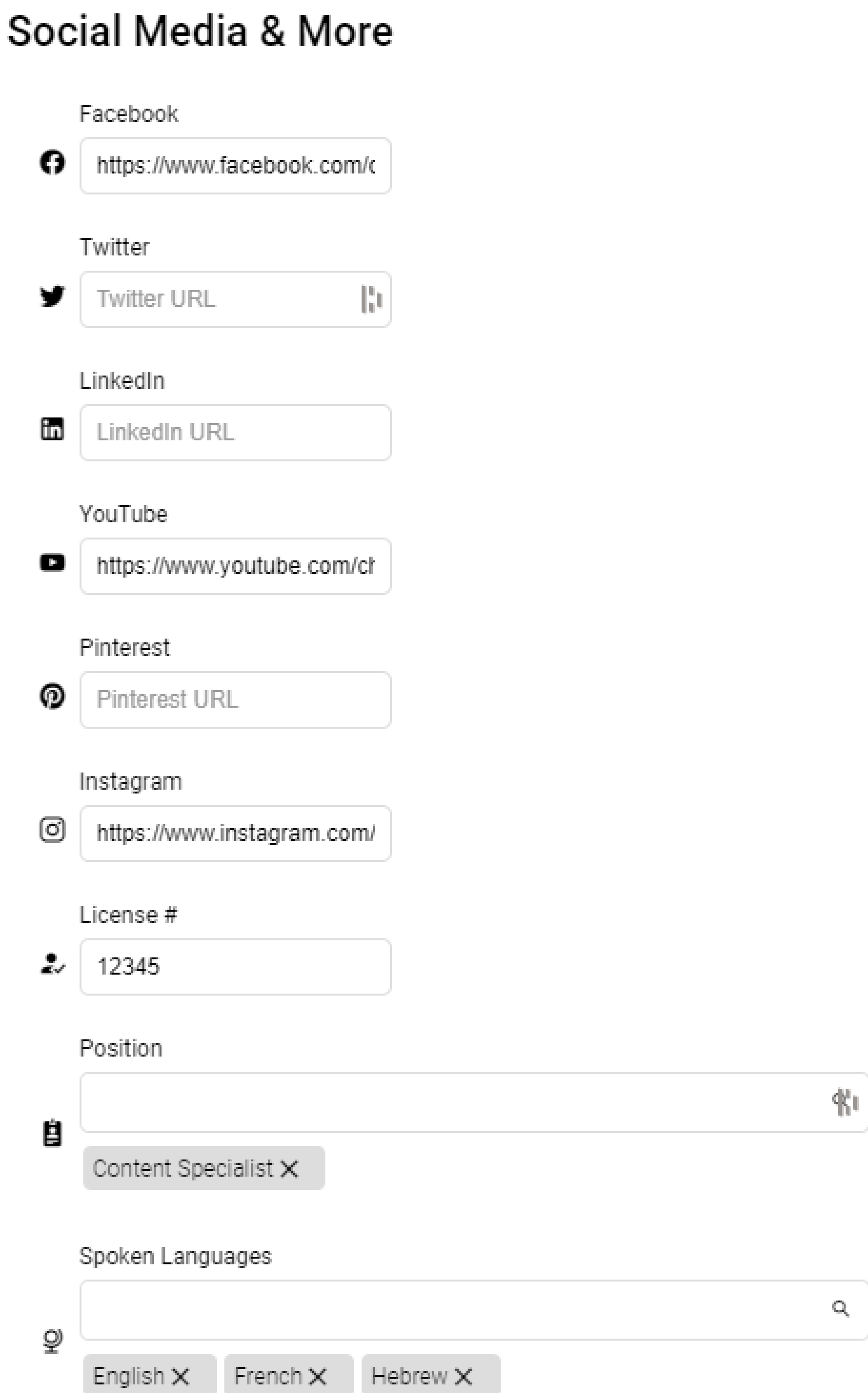


Social Media Links

You can add a link to your Facebook, Twitter, YouTube, Pinterest, and Instagram here. These will be displayed on your website for your contacts to click and find your social media pages.

License #

Here you can add your license number. This will be displayed on the 'Agent Profile' page of your website.

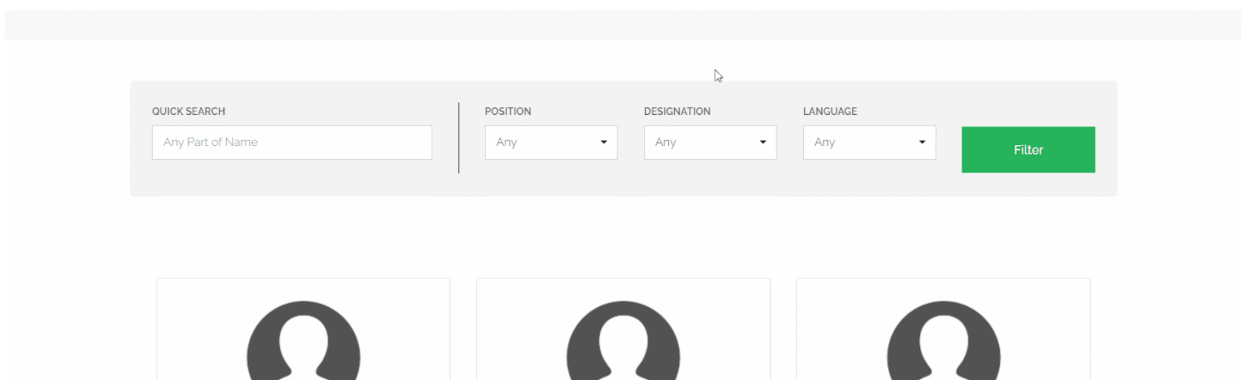
Position

Add your position which will be visible on the 'Agent Profile' page on your website and Agent Roster. Ex: Licensed Realtor, Broker, or Mortgage Advisor

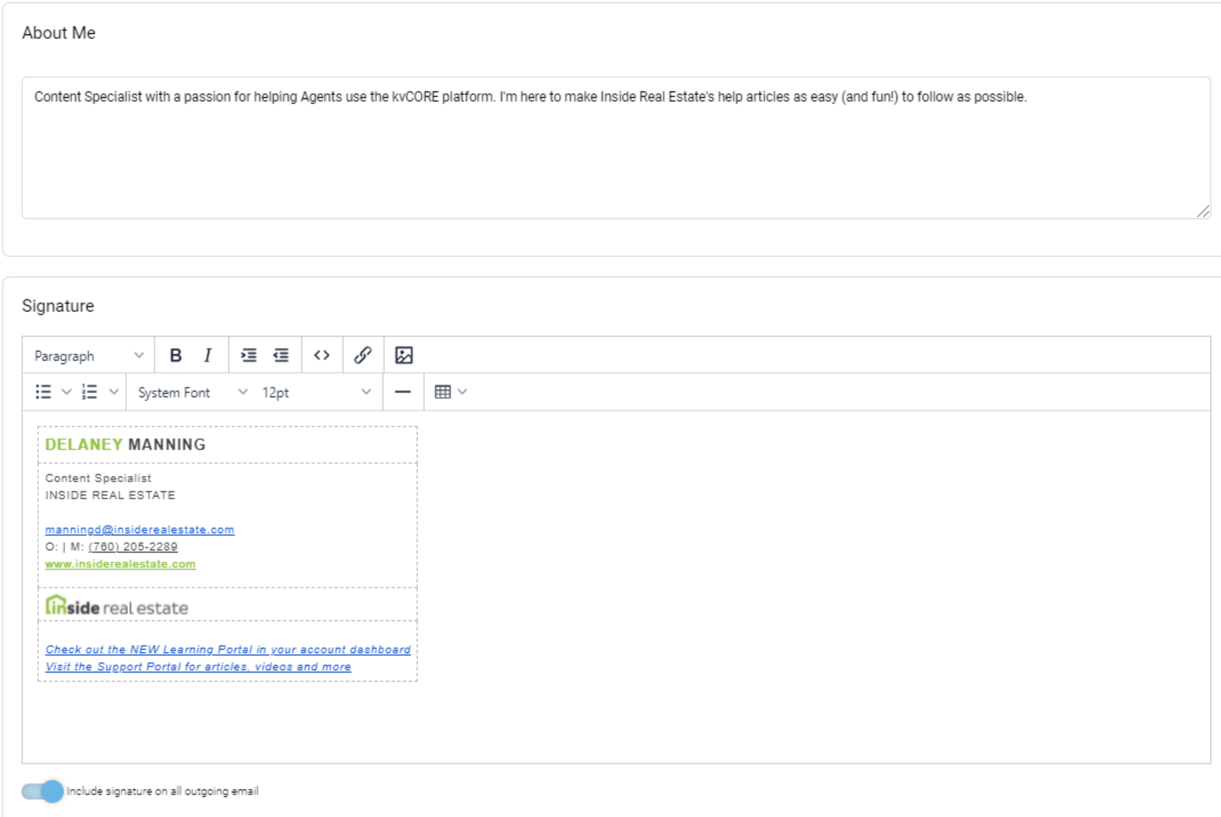
Spoken Languages

Your spoken languages can be added here for your contacts and those viewing your Office/Team/Company Agent Roster page.

Your position, languages spoken, and designations can be used by potential clients to search on Office and Company websites! By filling in as much information about yourself as possible, people can find you by your specializations easily from the sites you're included on, using the 'Agent Roster'.



About Me & Signature



About Me

The section beneath your basic profile info is "About Me." This is the spot for your bio and it shows on the 'Agent Profile' page on your website. You can enter any plain text that you want, or you can use HTML.

How to Customize Your Agent Bio

Signature

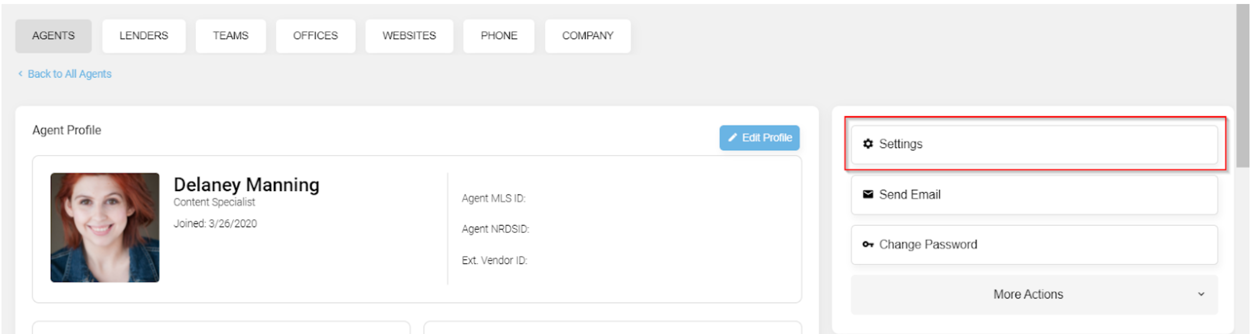
Here you can set your personalized signature which can be automatically added to all emails you send from kvCORE.

Include Signature On All Outgoing Email Toggle

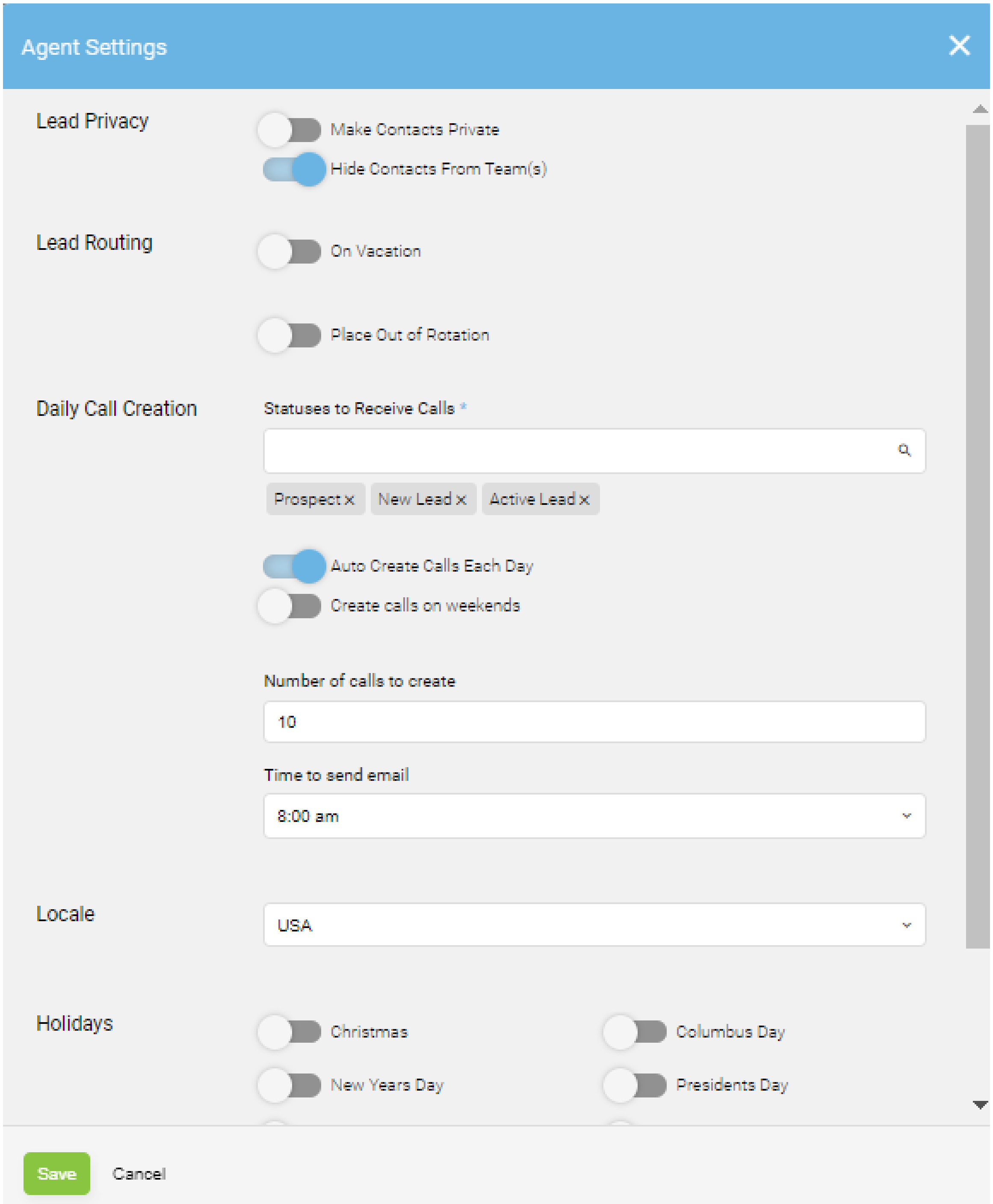
You should toggle this on so that all emails sent from kvCORE automatically include your signature. This includes Smart Campaign emails, Search Alert notifications, Seller Reports, and every other type of email.

Profile Settings

Once you've gotten your basic profile setup, you can access more advanced settings by clicking on the 'Settings' button in your profile. These options allow you to set Lead Routing and Daily Call rules specific to you.



Here, you can enable Lead Privacy, set yourself to 'away' in Vacation mode, adjust your Daily Call Creation settings, and mark 'off' days for specific Holidays.



Lead Privacy

If your Company or Team has enabled lead privacy you can use this toggle to hide your contacts from Admins.

To learn more about lead privacy, click here.

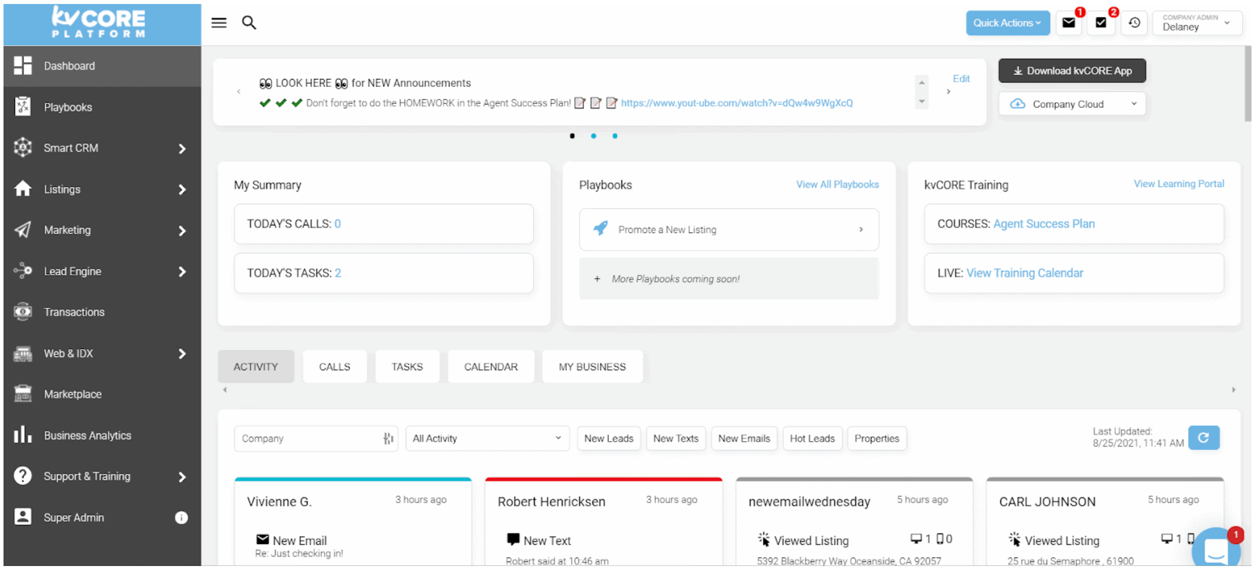
Lead Routing

Set your vacation days to stop leads from being routed to you while you're out of the office, or remove yourself from lead rotation.
To learn more about lead rotation, click here.
Daily Call Creation
Daily 'calls to make' are displayed on your dashboard and in your mobile app dialer. These calls are triggered off of events that are set in Smart Campaigns, or from events that your contacts will trigger as they use your website (like if they saved a listing).
To learn more about daily call creation, click here.
Locale
Select either the USA or Canada based on your locale.
Holidays
To make it easier to mark yourself 'Away' for holidays instead of using the Vacation toggle, select the Holidays on which you would not like to receive leads from your Company or Team.

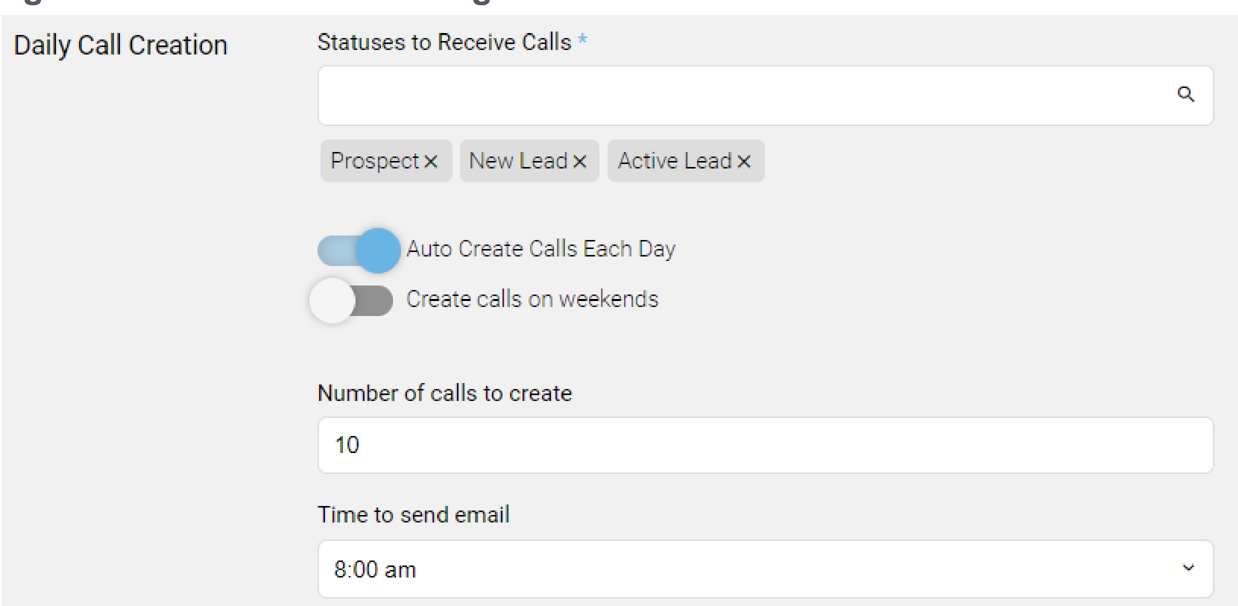
Daily Call Creation

Each day, you will receive an email from kvCORE summarizing your task items and calls. Daily 'calls to make' are also displayed on your dashboard and in your mobile app dialer! These calls are triggered off of events that are set in Smart Campaigns, or from events that your contacts will trigger as they use your website (like if they saved a listing!).
For more information on the mobile app, click here.
How to Set Up Daily Calls

To set up your daily call parameters, access your agent profile settings from the dropdown menu. Then click 'Settings'.



Using these settings you can alter the number of calls the system wants you to make to contacts in your database. There will always be a reason for the phone call that you will see on your screen before you call them that the system is watching out for 24/7 on your behalf. The more calls you can handle, the better your conversion rate from leads into clients will be! Although the settings below can be adjusted, it's recommended that new Agents use the default settings.



Disclaimer: These are calls that are designed to be managed by the Agent and these are reminder calls that the kvCORE system DOES NOT make the

call but the Agent does. *The scheduled calls are a reminder for the agent to complete.*

Frequently Asked Questions

Which contacts are daily calls created for?

By default contacts must fall into the following criteria:

- Not 'Archive,' 'Closed,' or 'Contract' status.
  - This is the only criteria of the 3 that can be updated. You can add or remove which statuses you would like daily calls created for from the settings in your profile.
- Not Unsubscribed.
- Have a phone number.

What conditions must be true for a call to be created?

- The contact may not have a 'missed' call that was previously auto-created as a daily call. Manually scheduled calls do NOT count towards this.
- You must be below the limit for the maximum number of calls created already for the day. (This is configured here.)

What conditions (regarding the contact) trigger calls?

The system will iterate through the following rules until your daily call limit has been reached.

1. Contact has triggered a behavior in the last 24hrs, and not been called in the past week
2. Contact has viewed a property in the last 6 months, and not called in the past 30 days
3. Contact was created in last 90 days, and not called in past 30 days

4. Contact has never been called (prioritized by age), and not called in the past 30 days
5. Contact has a rating of 3 stars or more and has not called in the past 30 days
6. Contact has responded to a text and has not been called in the past 30 days

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How to Set Your Email Signature

Email signatures are the best way to represent yourself in each and every email you send out, in kvCORE or otherwise. Think of it almost as a business card that sends with every communication to your contacts. If you do not already have a signature they are pretty quick to create and only need to follow a few guidelines:

- It should identify you and your business/brokerage.

  TIP: Adding a logo, either yours or your brokerage's (or both), is also a great aspect to include. Pictures are more memorable and quickly recognized versus just plain text names.
- It should include direct ways to contact you.
- It should link to your kvCORE website.

You can also add links to your social media and legal disclaimers, but remember to keep the signature easy to read; too many icons, colors, or text can overwhelm the receiver or even get caught in a spam filter! Simple and elegant is what you want to aim for.

DELANEY MANNING
Content Specialist
INSIDE REAL ESTATE

manningd@insiderealestate.com
O: | M: (760) 205-2289
www.insiderealestate.com

Check out the NEW Learning Portal in your account dashboard
Visit the Support Portal for articles, videos and more

This is a great example that incorporates all the suggested features while staying succinct and visually easy on the eyes.

Once you have your desired signature created, you can copy/paste it into your kvCORE profile or save time by creating the signature in kvCORE at the beginning.

Adding an HTML Signature in kvCORE

You have the ability to build your signature using HTML if that is something you prefer or if your signature was created by a third party who gave you a block of code to add to your email settings.

Simply click the caret icon along the top of the signature's toolbox to access the source code for that area.

For more information on HTML, click here.

Canadian Agents Only

If you create a unique signature please make sure it follows the exact format that CASL demands to remain in compliance.

Including the Signature in Every Email

Now that you have your signature created and saved in kvCORE, there is a second step you will want to take so that this signature is now sent out at the bottom of each and every email message that is sent from kvCORE. When looking at your profile out of Edit mode you will see a toggle just under your signature. You should toggle this on so that all emails sent from kvCORE automatically include your signature.

This includes [Smart Campaign] emails, [Search Alert] notifications, [Seller Reports], and every other type of email.
TIP: This profile toggle overrides any other signature toggles that exist in kvCORE. If you have not already toggled on the "Include Signature" option in your Smart Campaign templates, your signature will still send as long as you have the profile toggle enabled.

How Do I Know Which Teams/Offices I'm a Part Of?

From your Profile, the Offices and Teams sections will be visible on the righthand side.

Offices

Office	Role
Implementation	Admin
T3 Support	Admin
Training	Admin
Sales	Admin
Account Management	Admin

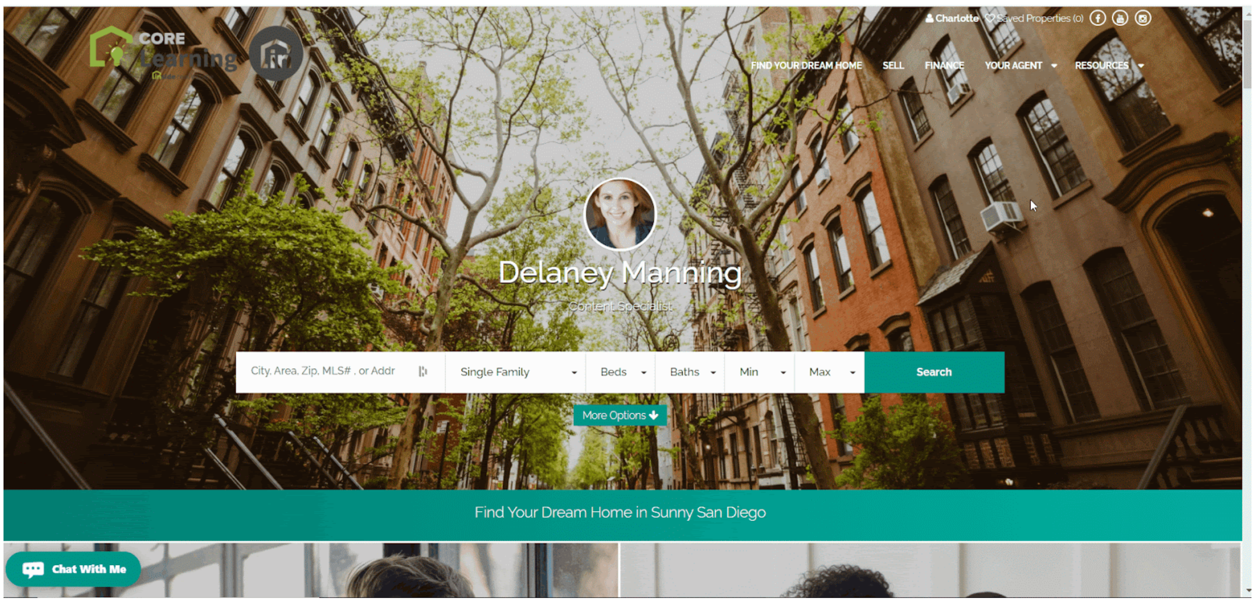
Teams

Team	Role
kvCORE Training Team	Admin

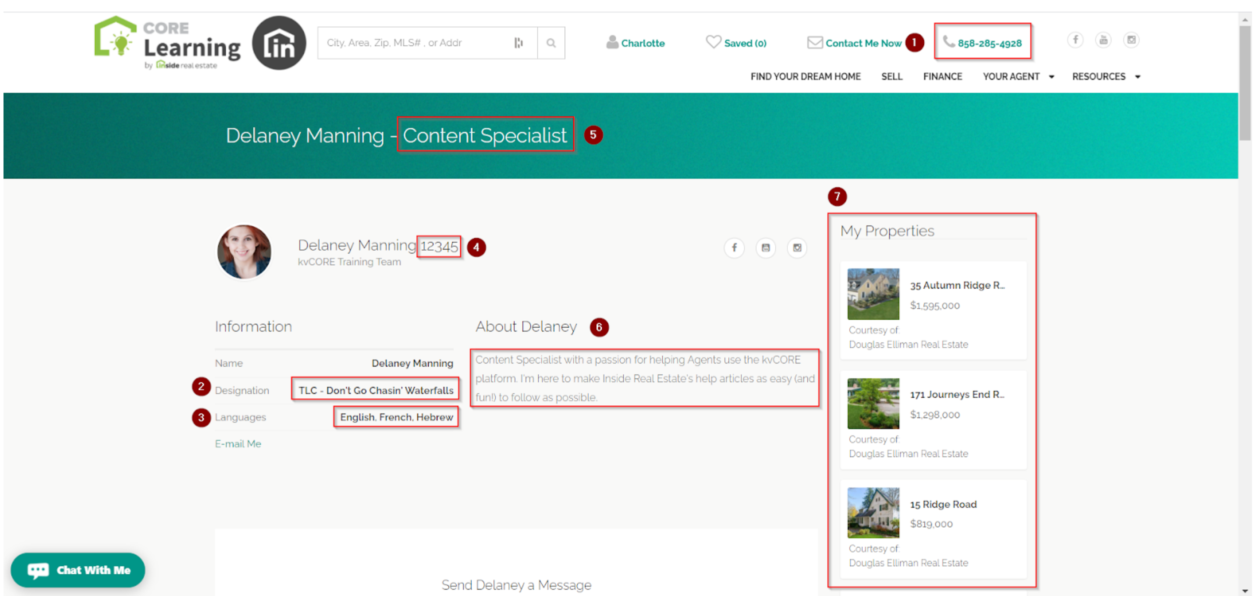
Click on an Office or Team name to see who else is a part of the entity as well! You can also see other important details such as the logo, address, and other contact information your Office or Team is using. This information '[trickles down]' to your personal Agent website. Some settings may be changed, but not all of them (such as logo or address.)

Where Does My Profile Information Display?

Your basic profile information integrates with the 'Agent Profile' page on your kvCORE website.
To see your Agent page, navigate to your kvCORE website. Hover over 'Your Agent' and select 'Agent Profile' from the dropdown.

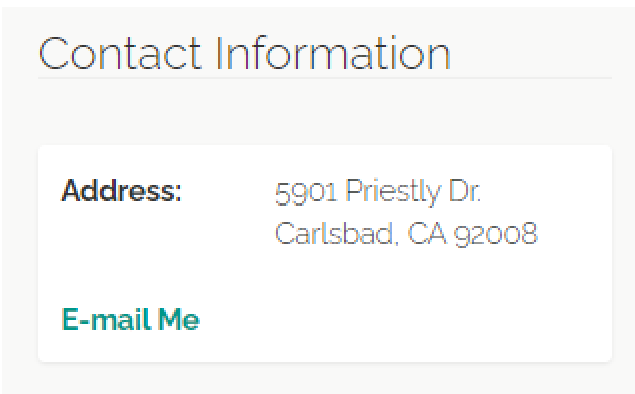


The Agent Profile page will display various information from your profile in kvCORE.



1. **Website Phone Number or kvCORE Smart Number**

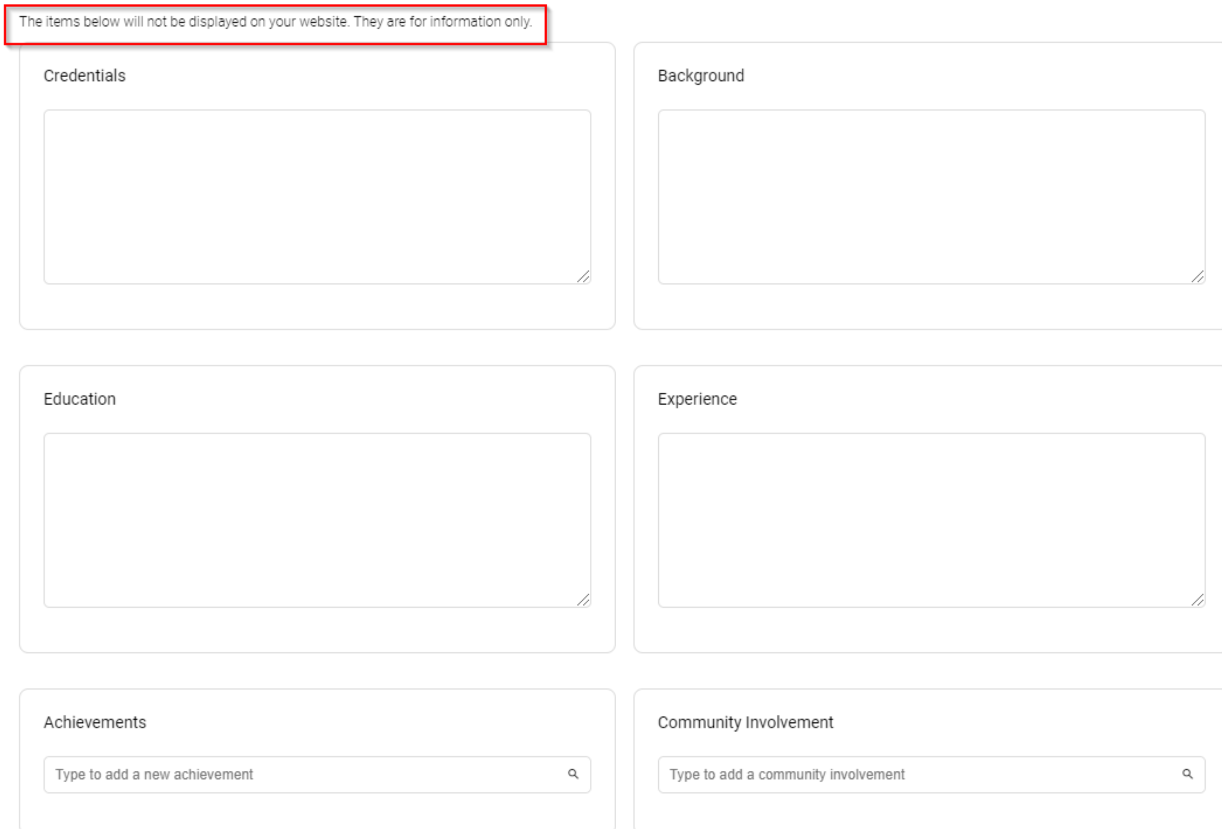
2. Selected Designations
3. Selected Languages
4. License #
5. Position
6. Agent Bio
7. Agent Listings
    - If you do not have any personal listings linked to kvCORE your Office information will be visible.



Extra Fields

Some profile information that may be set on your Agent profile will not show on the front end of your website.
The following fields are for informational purposes only and will not show on your kvCORE website.

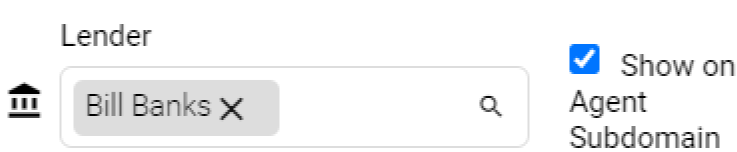
- Credentials
- Background
- Education
- Experience
- Achievements
- Community Involvement



TIP: Build email templates with this information that you send out to new contacts to show them why you are the best Agent for them! You can even add this to your 'About Me' section to display on the site.

How to Connect Your Lender Partner to Your kvCORE Account

Connecting your preferred Lender to your profile is easy and can bring all aspects of your business together, using the kvCORE platform. Once your Lender is added to your profile their information will display on the 'Finance' page and automatically connect them to your new contacts.
For more information on the 'Finance' page, click here.
From the Profile, you'll see the 'Lender' and 'Show on Agent Subdomain' sections.



If you work with a specific lender, you can choose them from the dropdown. If they are not available please reach out to your Admin for assistance! Brokers or Admins must enter new Lenders into the system where they can log in to manage leads.
Any new leads you generate after adding them to your profile will be assigned to this Lender in their dashboard.
Co-Marketing Strategies & Tactics For Getting Your Lender Involved

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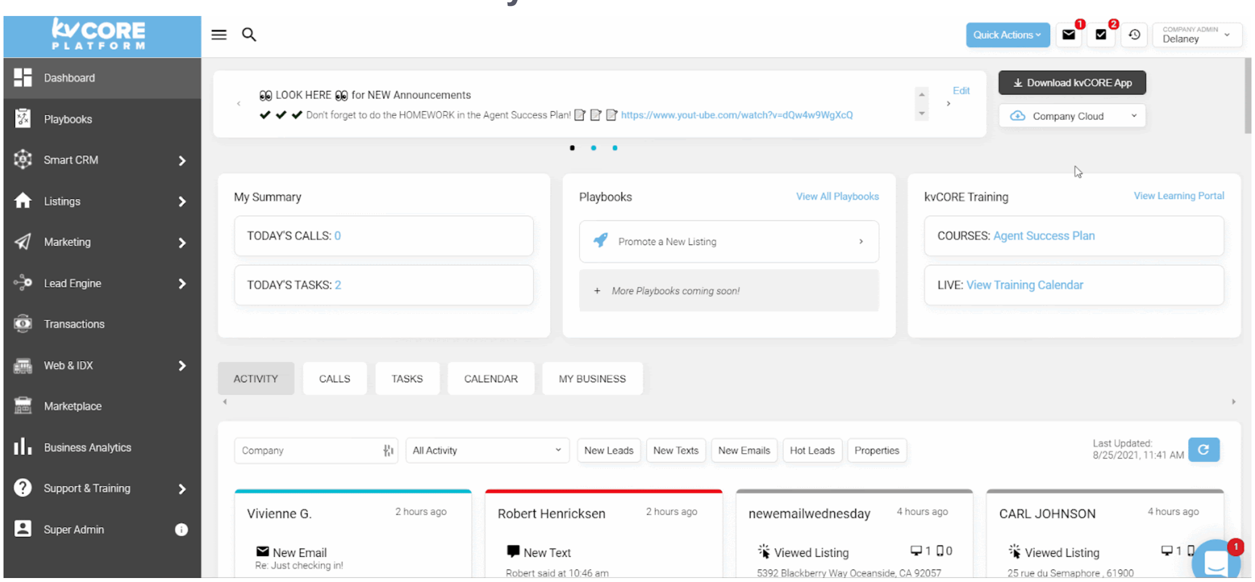
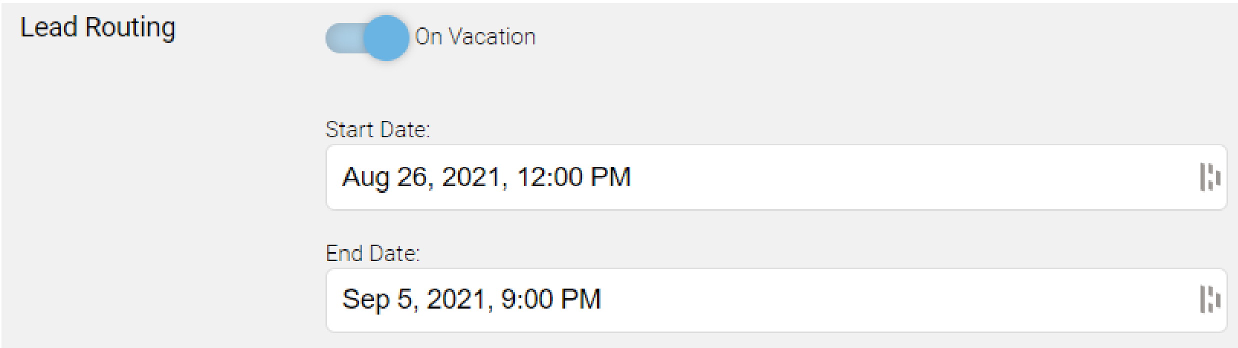
Setting Yourself on Vacation Mode

The vacation mode in kvCORE prevents new leads from being assigned to you that you would be expected to work/reply to.
Please Note: Leads that come through on your personal Agent website or through your advertising will still be sent to your CRM. Setting your profile on vacation is only applicable for leads that are assigned to you via your Team, Office, or Company.
To go on vacation, access your Agent profile settings.
Open your menu from the upper right corner of the dashboard. Then select 'My Profile. Click the 'Settings' button on the top right and toggle 'On Vacation' on. You can then set your dates and save them!





Please Note: If you set no end date, vacation mode will stay on until you turn it off. If you choose no start date, then vacation mode starts when you save your changes at the bottom.

TIP: This is important because if you are expected to follow up with leads that are given to you by your agency, you could be held accountable for those follow-ups while you're away! You may want to log in quickly each day and snooze your calls and tasks or work out coverage with another Agent to assist you with that while you're out.

Related Content

[kvCORE - Video] How to Set Up Your Profile and Configure Your Email Signature

About the Lender Info & Finance Page On Your Website

Have more questions? Please reach out to Customer Support via the blue chat bubble to the right or by emailing kvcore@insiderealestate.com