

CB CONNECT

DIRECT MAIL POSTCARD PROGRAM



INSTRUCTIONS FOR ADDING CONTACTS

Process Overview:

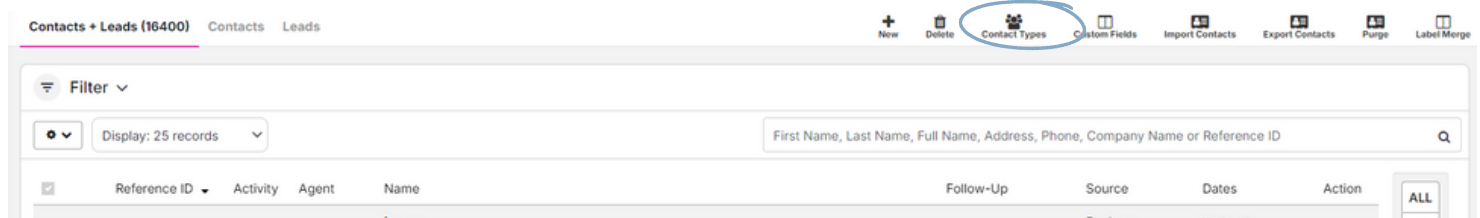
Use a CBiQ Contact Type to create and maintain your CB Connect postcard program list. The Marketing Team will export your list shortly after the first day of each month, which is the deadline for making adjustments to your list for the following month's postcards. For example, any changes that you'd like reflected in the May postcard must be made in CBiQ no later than April 1.

What you'll need:

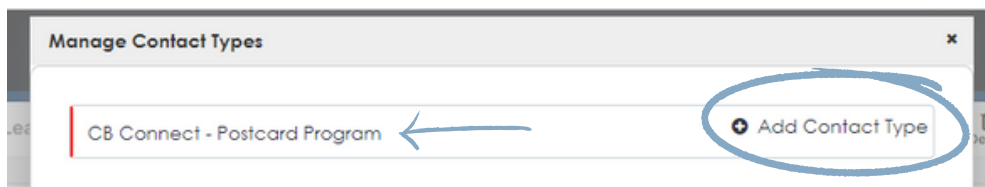
- Submit our [CB Connect Sign-Up Form](#)
- Upload contacts you'd like to add to your CBiQ database. [Click here](#) for instructions, or contact your Agent Concierge or the Marketing Team for assistance.

Step 1: Create your CB Connect contact type

Log into CBiQ > click My Contacts/Leads > click Contact Types



Type "CB Connect - Postcard Program" > click + Contact Type



Questions? Contact marketing@cbdistinctive.com

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Step 2: Add contacts to your new contact type

On the My Contacts/Leads screen, select the contacts you'd like to add to CB Connect using the checkbox to the left of each contact.



Contacts + Leads (16400)									
Contacts				Leads					
	Reference ID	Activity	Agent	Name	Follow-Up	Source	Dates	Action	
☒	OK 903476		Di Pilato, Carrie	Kimberly Yenter Email: shearkim@hotmail.com lead source: coldwell banker website lead form: property_detail_contact_form Cell:	☐ Phone ☐ Text ☐ Email	Realty LeadEngine Status: Active ID: 903476	Updated: 10/03/2023 Added: 10/03/2023		
☒	OK 902529		Di Pilato, Carrie	Katie Taylor Email: junekeie@gmail.com lead source: coldwell banker website lead form: property_detail_contact_form Cell:	☐ Phone ☐ Text ☐ Email	Realty LeadEngine Status: Active ID: 902529	Updated: 09/29/2023 Added: 09/28/2023		
☒	OK 902221		Di Pilato, Carrie	Jason Stephen Email: jstephen68@gmail.com lead source: coldwell banker website lead form: property_detail_contact_form Cell:	☐ Phone ☐ Text ☐ Email	Realty LeadEngine Status: Active ID: 902221	Updated: 09/24/2023 Added: 09/24/2023		
☒	OK 902220		Di Pilato, Carrie	Michele Teed Email: mr791497@hotmail.com lead source: coldwell banker website lead form: property_detail_contact_form Cell:	☐ Phone ☐ Text ☐ Email	Realty LeadEngine Status: Active ID: 902220	Updated: 09/24/2023 Added: 09/24/2023		
☒	OK 902180		Di Pilato, Carrie	Richard Gauron Email: rpgauron@gmail.com lead source: coldwell banker website lead form: property_detail_contact_form Cell:	☐ Phone ☐ Text ☐ Email	Realty LeadEngine Status: Active ID: 902180	Updated: 09/22/2023 Added: 09/22/2023		
☒	OK 901856		Di Pilato, Carrie	Daryl Oster Email: daryl.oster@gmail.com lead source: coldwell banker website lead form: property_detail_contact_form Cell:	☐ Phone ☐ Text ☐ Email	Realty LeadEngine Status: Active ID: 901856	Updated: 09/19/2023 Added: 09/19/2023		
☒	OK 901091		Di Pilato, Carrie	Alan Umholtz Email: aumholtz@yahoo.com lead source: coldwell banker website lead form: property_detail_contact_form Cell:	☐ Phone ☐ Text ☐ Email	Realty LeadEngine Status: Active ID: 901091	Updated: 09/16/2023 Added: 09/16/2023		

Scroll to the bottom of the screen to the + Contact Type button. Select the "CB Connect - Postcard Program" contact type, then click Save.

☒	OK 900191		Di Pilato, Carrie	Christa Turnell Email: christaturnell32@gmail.com lead source: coldwell banker website lead form: property_detail_contact_form Cell:		Realty LeadEngine Status: Active ID: 900191	Updated: 09/12/2023 Added: 09/12/2023	
Previous Email + To Campaign + Contact Type Next								

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INSTRUCTIONS FOR ADDING CONTACTS

Step 3: Ensure contacts include all necessary information

Please ensure the following information is included in each contact record that you have added to the program:

1. **Display name** - Write the contact name exactly as it should appear in the mailing address, including first and last name of the contact and significant other, if desired.
Example: "James and Jennifer Smith"
2. **Address**
3. **Apt/Suite/Etc** (if applicable)
4. **City**
5. **State/Province**
6. **ZIP/Postal Code**

The screenshot shows a web interface for adding a contact. At the top, there are tabs: Details, Attachments, Actions, Communications, Property Watch, Listings, and History. The 'Details' tab is active. On the left, there is a circular profile picture placeholder with 'AC' and a star icon. Below it is the 'Reference ID: 900824'. The main form has two columns. The left column contains: 'First Name' (Anthony), 'Last Name' (Castelli), 'Display Name' (blue box), 'Second Email' (white box), 'Cell' (+1), 'Work Phone' (+1), 'Zip/Postal Code' (blue box), 'Website' (white box), 'Significant Other/Second Name' (white box), and 'Children' (white box). The right column contains: 'Email' (castelli@aol.com lead source: <), 'Phone' (+1 (970) 880-0514), 'Company Name' (white box), 'Title' (white box), 'Address' (TBD 17.9 Loop (g) Lot 11 in Corte), 'Apt/Suite/Etc' (blue box), 'City' (blue box), and 'State/Province' (blue box).

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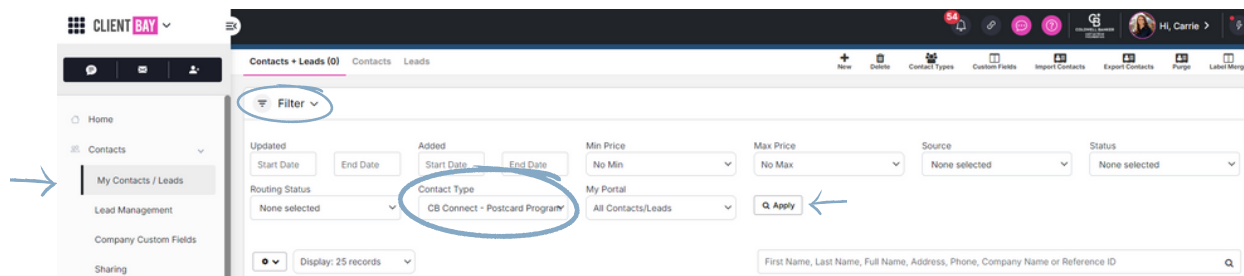
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INSTRUCTIONS FOR UPDATING CONTACT LISTS

To view contacts in your contact type

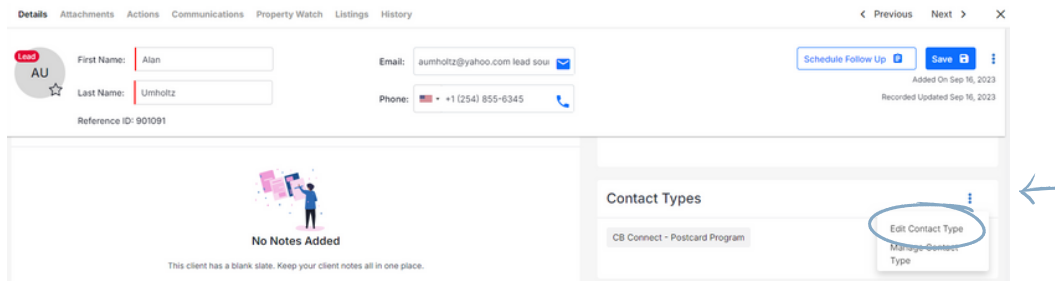
Click on the My Contacts/Leads Tab > click the Filter dropdown, then select "CB Connect - Postcard Program" under Contact > Click Apply



To add or remove a contact

Click on the contact > scroll down to the Contact Types box on the right side of the screen > click the 3 dots in the top right of the Contact Types box > click Edit Contact Type > check "CB Connect - Postcard Program" > click Add Contact Types

To remove a contact, follow the same steps as the above process for adding a contact, but uncheck the "CB Connect - Postcard Program" box before clicking Add Contact Types.



Questions? Contactmarketing@cbdistinctive.com