



Homebot Quick Start Guide

Step 1: Account Setup

Log into Homebot and click on “Profile & Settings” on the top right of the screen, then select your name in the drop down.

- **Profile:** Upload your picture and fill in your contact Information. [Click Here for instructions](#)
- **Digest Settings:** In the Homeowner Digest section, keep the defaults and feel free to customize your welcome message. [Click Here for instructions](#)

Step 2: Add Contacts

Contacts fuels Homebot and the more you put in, the better the results. You can add in contacts in the “Client” section, Customer Support can upload them, and contacts can add themselves on your landing page.

- **Paragon Users:** In Paragon, follow these steps
 - Select “**Contacts**” then “**View/Manage Contacts**”
 - Pick the contact you want to sign up onto Homebot
 - Select “**General**” on the left side of the screen and then select “**Contact Information**” under General
 - After you put in the contacts name, email, and home address, select “**Add Contact to Homebot**” in pink
- **Homebot:** To enroll a contact, Homebot need a name, email and home address [Click Here for instructions](#)

Step 3: Marketing

Homebot offers several marketing tools for lead generation. These tools can be used several ways in your day to day activities. These tools are located under “Share” on the top of the Homebot page.

- **Landing Page URL:**
 - Link to the Seller section of your website
 - Use as Open House Registration to enroll visitors and curious neighbors
 - Place the link in your email signature so others can enroll
- **Facebook Posts:** To enroll a contact, Homebot need a name, email and home address [Click Here for instructions](#)

Step 4: Daily Tasks

First, watch for any emails or texts from Homebot alerting you on new registrations or questions from your customers. Secondly, check the “Activity” section in Homebot ever few days to see which clients are opening their monthly Home Wealth Reports.

- **Activity:** [Click Here for instructions](#)

Step 5: Managing Contacts

- **Bad emails/Bounces:** [Click Here for instructions](#)
- **Preview clients Homebot Reports:** [Click Here for instructions](#)
- **More HomeBot Helpful Tips:** [Click Here for instructions](#)

Customer Support: Homebotsupport@bkfs.com / (800) 530-5395