01 · PIPELINE

# RISE Concepts & Terms

Whether you're coming from Engage, ActivePipe or Present, or you're brand new to RISE, these terms explain the foundation so you can use RISE to your greatest advantage.

COMING FROM ENGAGE?

## Sales Flow is now the **Board**. Task Plans are now **Campaigns**. Groups are now **Tags**. Contact Label is now **Contact Type**.

Same logic, more powerful platform. Terms marked "was" replace a name you may know; terms marked "New" are new to RISE.

## PIPELINE

### Board · was Sales Flow

Your pipeline view under Contacts. Each column is a Workflow Stage. Moving a contact to a new column can trigger automations.

### Workflow Stages

The six stages on the Board: Lead, Nurture, Warm, Hot, Under Contract and Post Close. A contact's stage decides which stage-triggered Campaigns apply.

### Contact Type · was Contact Label

Who a contact is to you, such as Buyer, Seller, Renter or Investor. RISE has 19 Contact Types and a contact can have more than one. Task automations use it to decide which tasks to create at each stage.

### Deals · was Transactions

A Buyer or Seller deal attached to a contact and its property. Deals move through Active, Pending and Closed, and the Deals view shows your active deal count and total pipeline value.

02 · AUTOMATION

# How Campaigns Work

A Campaign with a Stage Change trigger and Create Task actions is your new task plan.

### Campaign

The automation engine in RISE. Campaigns can send emails, post to social or generate tasks.

### Trigger · New

The event that starts a Campaign, such as a contact changing stage or a listing changing MLS status.

### Stage Change · New

A trigger that starts a Campaign when a contact moves into a specific Workflow Stage on the Board.

### Actions · New

The steps a Campaign performs: send an email, post to social or create a task.

### Delay & Conditions · New

A Delay pauses a Campaign before the next action. A Condition checks something, such as the contact's current stage, before continuing. If a contact no longer meets it, the Campaign stops for that contact. That's working as intended.

### Enrollment Scope · New

Who a Campaign applies to: all matching contacts, or only contacts that newly enter the stage. Use "Only new contacts in Stage" if agents already have manual tasks, to avoid duplicates.

### Draft vs. Started · New

A saved Campaign is a draft. It isn't running until someone clicks Start. Always confirm a Campaign shows as started after setup.

### Send As · Admin only

Lets an admin deploy a Campaign on behalf of selected agents or offices. This is how brokerage-wide automations are activated.

03 · CONTACTS & DATA

# Contacts & Data

Cleaner data means smarter automation. These fields and tools decide who gets what.

### Tags · was Groups

Labels you add to contacts for organizing, filtering and targeting Campaigns.

### SmartGroups · New

Contact groups that update automatically from rules you set, so new matching contacts are added without manual tagging.

### Insights Locations

A zip or postal code on a contact record showing their area of interest. Market Insights uses it to personalize each contact's market data. Contacts without one won't receive Market Insights.

### Client Discovery Survey · was Buyer Survey

One survey for any type of client (buyer, seller, renter, investor and more) that uncovers their goals and details. RISE AI may recommend sending it through Opportunities.

### Contact Sync

Connecting your email account lets RISE sync your contacts. Engage users who had email connected see their contacts migrate automatically at first login.

### Property Preferences

A contact's home-search criteria, gathered through the Client Discovery Survey or entered manually. Property Match uses them to send matching listings.

### Subscription Status

Whether a contact is subscribed to receive your emails. Clients can update their own preferences. Subscribed means you're able to send to them, not that anything is being sent.

04 · RISE AI

# RISE AI

Every term on this page is new to RISE.

### RISE AI
The AI built into RISE that powers Opportunities, Top Contacts, AI Prompts and RISE AI Chat.

### RISE AI Chat
A chat where you can ask RISE AI to complete tasks, learn more about a contact, review Campaign reporting or work through Campaign ideas.

### AI Prompts
Suggested prompts for RISE AI Chat that help you get started on common tasks and questions.

### Opportunities
Specific recommendations RISE AI surfaces for you, such as sending a Client Discovery Survey to a contact.

### Top Contacts
Contacts RISE AI identifies as worth reaching out to, based on signals like email interactions and responses. Each includes a recommended action and suggested messaging.

### Smart Copy
RISE AI writes content for you from a prompt. Available in the email builder, messages and the social post tool.

### Signals
The activity, data and interactions RISE AI uses to surface Opportunities, identify Top Contacts and recommend actions, such as email opens, clicks and responses.

05 · CONTENT & MARKETING

# Content & Marketing

## CAMPAIGNS

### Market Insights · was Neighborhood News

A monthly Campaign that sends each contact a personalized market snapshot for their Insights Location.

### Just Listed / Just Sold

Campaigns triggered by MLS status changes that automatically email your contacts when you list or sell a property.

### Property Match

Sends contacts listings that match the Property Preferences from their Client Discovery Survey.

### Housiversary

An annual email sent on the anniversary of a contact's home purchase.

## BRAND

### Brand Governance · New

The brokerage's control over how its brand appears, through Style Kits, templates and logos. Brand Admins manage logos across the brand hierarchy in one library that stays in sync.

### Style Kits · New

An approved set of brand styles. Applying one to a presentation automatically updates its look and feel (coming to email soon).

### Media Library · New

Where images and PDFs are stored for use across RISE. Canva assets can be imported straight in and are immediately available for emails, Campaigns and presentations.

06 · PRESENTATIONS & MOBILE

# Presentations & Mobile

### Presentations · was Present

Builds branded CMAs and buyer presentations for you to review and send.

### Templates · New

Also called Presentation Manager. Templates are pre-set pages for a presentation. They can include system and custom pages and keep every page setting you've customized.

### Pages

The individual pages that make up a presentation, such as a cover page, agent bio, comparables, custom pages or imported Canva pages.

### Custom Comps · New

Comparables you create from an MLS listing or enter manually. They're saved, so you can add them to any presentation whenever you need them.

### RISE Picks · New

The comparables RISE AI recommends when you build a CMA. Accept them all or select your own. You always control which comps appear.

### Quick CMA · New

An automated CMA with 5 comparables selected by RISE AI. A fast conversation starter on the go. For a full CMA with your own comps, use the Presentation Builder.

### Companion App

The RISE mobile app, available for iOS and Android as MoxiWorks RISE. View and send presentations, and view, send or pause Campaigns.