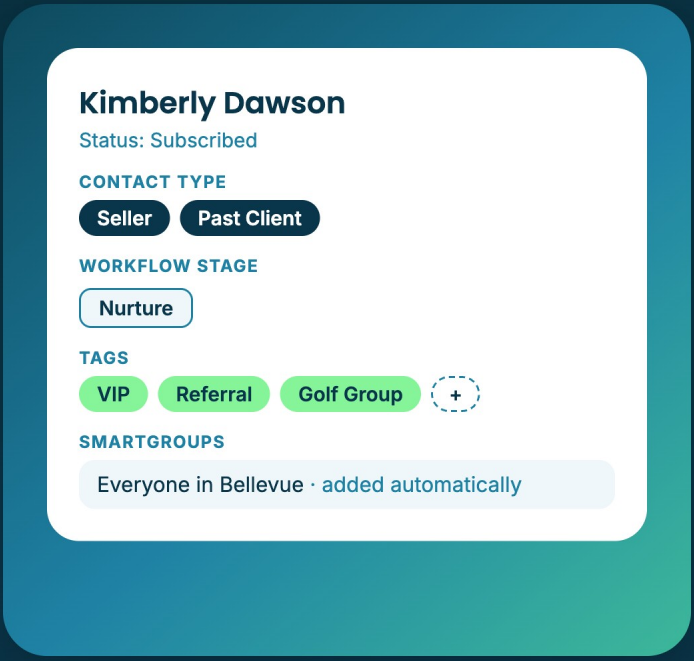
RISE

By MoxiWorks

Contacts

Your Relationships, Organized.



Contact Type
Who they are, from 19 types

Workflow Stage
Where they are, Lead to Post Close

Tags
Groups only you know, added by hand

SmartGroups
Groups RISE fills for you, by rule

What It Does

Classify each contact by who they are and where they are in your pipeline, then group them for targeted campaigns.

Why It Matters

- Stop guessing who to call first
- Send the right campaign to the right person
- Keep personal contacts out of marketing
- Find anyone in seconds

Before You Start

If only you know who belongs, use a Tag. If RISE can work it out from criteria, use a SmartGroup.

Common Question

"Unsubscribed vs. Do Not Market?"

Unsubscribe means the contact opted out. Do Not Market blocks marketing email from sending regardless of subscription status.

What You Get

- **Birthday & House Anniversary:** key dates for timely, personal touches.
- **Property Preferences:** price, beds, baths, and locations, from a survey or added by hand.
- **Notes:** how you met and what you discussed, so no call starts cold.
- **Custom Fields:** anything else your business tracks.
- **Tags:** your own groups, ready for campaigns.

The more you organize, the more RISE can do for you.

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