

## How to use the NETTRAKK AI Generator

Go to My Account in the Menu tab and click on Customize Email.

The screenshot displays the 'Customize Email' page in the NETTRAKK user interface. At the top, there is a navigation bar with 'My Account > Edit' on the left and 'Welcome back, Candace Miller' on the right. The main navigation menu includes 'Analytics', 'Clients', 'Realtors', 'My Account' (highlighted with a red circle), 'Help', and 'Logout'. The page title is 'Customize Email'. Below the title, there are sub-navigation tabs: 'My Account', 'Customize Email' (highlighted with a red circle), 'Invoices', and 'Billing'. The main content area is divided into two sections. The left section is for manual email creation, featuring a 'Send Me Test Of Monthly Newsletter' button, a 'Send on Demand Newsletter Now' button, and a large text area labeled 'Email Content (0/3000)'. Below the text area, there are placeholder instructions: 'Allowed placeholders: [Client First Name] [Client Last Name] [Your Name] [Company Name]'. A note states: 'Please save email content before sending either the regularly scheduled email, or on demand email.' There is also a toggle for 'Enable Automated Monthly Newsletter Send' and a 'Save' button. The right section is titled 'Open AI Generator' and contains several dropdown menus: 'I want to target clients in (optional):' with a 'Search Regions' field and a 'Clear' button; 'The tone of my message will be:'; 'The topic of my message is:'; 'The length of my message is:'; and 'My sales technique is:'. A 'Generate Email' button is located at the bottom of this section.

### Creating Custom Email:

If you are creating your own email, please craft it in the “Email Content” box. Once your email is complete you have a few steps to take:

- If you would like to add placeholders to the email to customize to your clients, please see the options available below the “Email Content” section
- Please add the placeholders manually as shown below
- \*Ensure you hit Save – if you do not save the new email the system will resend out the last email that was saved on the next first Thursday of the Month.
- Once you are satisfied with your email always send yourself a test of the monthly newsletter in order to proof and review it
- After you have proofed the email, if you need to make any preferred changes do so and then hit “Save” and send yourself a test again

NETTRAKK

Analytics Clients Realtors My Account Help Logout

## Customize Email

My Account Customize Email Invoices Billing

**Always send yourself a "Test" of the Monthly Newsletter**

Send Me Test Of Monthly Newsletter Send on Demand Newsletter Now

Email Content (0/3000)

Email Content

Allowed placeholders: [Client First Name] [Client Last Name] [Your Name] [Company Name]

**Please save email content before sending either the regularly scheduled email, or on demand email.**

Enable Automated Monthly Newsletter Send  **Ensure you have enabled your Automated Monthly Newsletter**

**Save** **\*\*\*If you do not "Save" your email, it will resend the last saved email\*\*\***

**If you choose to use the AI Generator to assist with your email for the month, please complete the fields and click "Generate Email"**

### Open AI Generator

I want to target clients in (optional):  
Edmonton, AB, Canada

The tone of my message will be:  
Business Casual x v

The topic of my message is:  
Home buying process and steps x v

The length of my message is:  
Short, <200 words x v

My sales technique is:  
Subtle x v

**Generate Email**

### Creating an AI Generated Email:

- Use the dropdown tabs in the "Open AI Generator" to Generate your current monthly email
- Click on Generate Email and you will see the content generated in the right side of the screen
- If you would like to change the style of the email click on "Re-Customize Settings" and restart
- Once you are satisfied with your generated email click on "Copy Content" – your email will now move over to the left side under "Email Content"
- You can make modifications to this email if applicable once it is in the "Email Content" section
- If you would like to add or remove placeholders to the email to customize to your clients, please see the options available below the "Email Content" section
- \*Ensure you hit "Save" – if you do not save the new email, the system will resend out the last email that was saved
- Once you are satisfied with your email always send yourself a test of the monthly newsletter in order to proof and review it
- After you have proofed the email, if you need to make any preferred changes do so and then hit "Save" and send yourself a test again

Send Me Test Of Monthly Newsletter | Send on Demand Newsletter Now

Email Content (0/3000)

Email Content

After you click on "Copy Content", your generated email will move over here where it can be modified

Here are some "Allowed" placeholders if you would like to craft your own email with personalization

Allowed placeholders: [Client First Name] [Client Last Name] [Your Name] [Company Name]

Please save email content before sending either the regularly scheduled email, or on demand email.

Enable Automated Monthly Newsletter Send

Save

If you would like to change the style or requirements of the AI Generation, re-customize the settings

### Open AI Generated Content

Here is an example of an AI Generated email

Subject: Your Guide to Navigating the Home Buying Process, [Client First Name]

Dear [Client First Name],

We hope this newsletter finds you well. As spring approaches, we understand that many of you may be considering taking the exciting leap into homeownership. At [Your Company Name], we are committed to helping you make informed decisions throughout the home buying process. Today, we would like to share some valuable insights and steps to guide you on this journey.

Step 1: Define Your Budget - Determining your budget is essential to avoid any unexpected surprises. We recommend sitting down with a mortgage professional, like myself, to assess your financial situation and explore suitable mortgage options that align with your goals.

Step 2: Pre-approval Process - Obtaining a pre-approval letter not only gives you a clear picture of your purchasing power but also strengthens your negotiation position. Let us assist you in gathering the necessary documents and securing a pre-approval in a hassle-free manner.

Step 3: House Hunting - This is where the fun begins! With your budget in mind, start exploring neighborhoods and properties that meet your criteria. Our team can provide valuable advice and connect you with trusted real estate professionals who truly understand the Edmonton market.

Step 4: The Mortgage Application - Once you find your dream home, we will guide you through the mortgage application process. With our extensive network of lenders, we can secure the best possible rates and terms for your unique circumstances.

Step 5: Closing the Deal - Congratulations! We will work closely with you and your legal representatives to ensure a smooth closing process. We will assist in completing the necessary paperwork and answer any questions that may arise.

Remember, as your trusted mortgage agent, we are here to simplify the home buying process and address any concerns you may have along the way. Feel free to reach out to us at [Your Contact Information] for personalized support or to discuss any specific questions you may have.

Warm regards,  
[Your Name]  
Mortgage Agent at [Your Company Name]

If you are happy with the document, copy the content and it will move over to the screen on the left where you can make any required changes

Re-customize Settings | Copy Content

\*\*\*This is very important information regarding the AI Generator:

- This is an AI Generated email so it might require some adjustments
- \*Some of the placeholders will not generate correctly in the email if the AI Generated placeholder does not match the accepted placeholders listed below the "Email Content" section
- Please ensure you modify the placeholder as required and always send yourself a test email to proof it prior to being sent out to your clients

Send Me Test Of Monthly Newsletter | Send on Demand Newsletter Now

Email Content (2136/3000)

Subject: Your Guide to Navigating the Home Buying Process, [Client First Name]

Dear [Client First Name],

We hope this newsletter finds you well. As spring approaches, we understand that many of you may be considering taking the exciting leap into homeownership. At [Your Company Name], we are committed to helping you make informed decisions throughout the home buying process. Today, we would like to share some valuable insights and steps to guide you on this journey.

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Warm regards,  
[Your Name]  
Mortgage Agent at [Your Company Name]

Allowed placeholders: [Client First Name] [Client Last Name] [Your Name] [Company Name]

Please save email content before sending either the regularly scheduled email, or on demand email.

Once you are satisfied with your changes, always send yourself a "Test" to ensure all fields have populated correctly. You want to ensure a perfect email goes out to your clients.

Make any desired changes once the AI Generated email moves over to this area

AI Generation is not perfect. You will see it is trying to generate "Your Company Name" but "Your" is not going to populate correctly as it is not allowed. Remove the "Your" or you can delete company name if you prefer as your branding is already at the top of the email that will be sent to your client. At this time you can also remove any fields you do not want.

### Open AI Generated Content

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Warm regards,  
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Mortgage Agent at [Your Company Name]

Re-customize Settings | Copy Content