



How to Invite a Sphere Contact

Staying in flow with our entire sphere of influence is a great way to get repeat and referral business. One way to stay in flow with your potential future clients is to invite them to the HomeHub app. This will give them access to your entire network of trusted professionals, whom they can use complimentary for years to come. *Agents can add their sphere of influence one person at a time or everyone all at once, using the sphere template. Find the template on Schmidt Resources.com in the HomeHub square, fill it out and download it yourself or you can send it to Help@MoveEasy.com and they will do it for you.

Step 1: From your Agent Dashboard select Invite Client from the top of the screen.

The screenshot shows the HomeHub Agent Dashboard. At the top right, there are three buttons: 'Invite Client' (circled in green), 'Add Vendor', and 'Download Your App'. Below these are three summary cards: 'Total Invites Sent' (7, 4.0%), 'Total Invites Opened' (3, 2.0%), and 'Total Invites Signup' (0, 0.0%). The main section is 'Client's Activity', which includes a filter dropdown set to 'Invited on', a date range of '01/01/2022 - 03/16/2022', and a search bar. Below this is a table with columns for Name, Concierge, Invited, Moving date, Status, and Action. The table lists several clients and their associated concierges, with most having a 'Signed up (Direct)' status.

Name	Concierge	Invited	Moving date	Status	Action
Details Niraj Patel	Details Archie Bradshaw	03/17/2022	12/01/2020	Signed up (Direct)	...
Details Tom Shively	Details Kenneth Strong	03/16/2022	02/01/2020	Signed up (Direct)	...
Details Kathie Allen	Details Andrew Pritchard	03/16/2022	03/01/2018	Signed up (Direct)	...
Details Shankar	Details Jeff Nevers	03/16/2022	04/16/2022	Signed up (Direct)	...
Details Regina	Details Matt Brownfield	03/15/2022	03/31/2022	Signed up (Direct)	...
Details Lakjfd Biskd	Details Jacoby Hughes	03/16/2022	03/23/2022	Signed up (Direct)	...
Details Austin Johnson	Details Matt Brownfield	03/14/2022	03/01/2022	Signed up (Direct)	...
Details Stephanie Test	Details Archie Bradshaw	03/14/2022	03/26/2022	Signed up (Direct)	...
Details Tom Shively	Details Jacoby Hughes	03/14/2022	02/01/2020	Signed up (Direct)	...
Details Tom Shively	Details Kenneth Strong	03/14/2022	02/01/2020	Signed up (Direct)	...

Step 2: From the options on the top, select Sphere Contact.

YOUR BROKERAGE Jane Smith (614) 123-1123

Invite Client Add Vendor Download Your App

New Buyer New Seller **Sphere Contact**

Personal Details

First Name* Enter First Name Last Name* Enter Last Name Email* Email Telephone Enter Phone Number...

MOVING DETAILS

Address Client Address Closing Date: mm/dd/yyyy

Email Details

Email Subject* Home ownership platform for you to use!

Email Content*

Check out this great new tool you can use to manage your home!
Your concierge will help you with whatever you need!

Step 3: Add your contact's name and information here, including the email and phone number. Agents have the ability to customize the email content for each sphere person if they prefer as well as add their email signature and more.

YOUR BROKERAGE Jane Smith (614) 123-1123

Invite Client Add Vendor Download Your App

New Buyer New Seller **Sphere Contact**

Personal Details

First Name* Tom Last Name* Shively Email* tom@moveeasy.com Telephone 510-555-1234

MOVING DETAILS

Address 1772 WOODCREST RD Closing Date: 03/04/2022

Email Details


Email Subject* Home ownership platform for you to use!

Email Content*

Check out this great new tool you can use to manage your home!
Your concierge will help you with whatever you need!

SEND EMAIL

Step 4: Select Send Email.

YOUR BROKERAGE  Jane Smith
(94) 123-123

[Invite Client](#) [Add Vendor](#) [Download Your App](#)

New Buyer **New Seller** **Sphere Contact**

Personal Details

First Name* Last Name* Email* Telephone

MOVING DETAILS

Address Closing Date:

Email Details

Email Subject*

Email Content*

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Check out this great new tool you can use to manage your home!
Your concierge will help you with whatever you need!

[SEND EMAIL](#)