



Generating the Lists

Open Vulcan 7 Folder
Click on Calling Areas Folder
Open Word Doc Titled "Start Here for List"
Open Correct PowerPoint Doc

The files and docs you will be working with are located in Google Drive under Vulcan 7 Folder.

Open Word doc titled "Start Here for List" located in the Calling Areas folder. This will have a screenshot of where we need to continue with our list.

Open the correct PowerPoint doc for the search area.

If the area you are starting with does not have a current PowerPoint doc then copy the Cole Master Copy PowerPoint doc and save it as "Cole Town Name Zip Code" like the other list.

Generating the Lists

Open Matrix in New Tab
Open Vulcan 7 in New Tab
Open the Call Tracking Google Spreadsheet

Open Matrix and zoom in the area where you will start. We work in quadrants. Start on the top NW corner of the town you are working on. Move south and when you reach the bottom of the town section go back to the top next to the section you left off.

Click on several homes that are active, under contract or sold so we can verify and determine what the subdivision name is. If the subdivision is a large area and you need to create two sets of calling list for that area, put in the list name North, South, East, West, Northwest, Southeast, etc.

Click on a home that is either active, under contract or sold so we can see the address.

Open Vulcan 7 using the username office@coloradohomeblog.com.

Once in Vulcan 7 click on the "Contacts" tab in the gray bar on the top. On the right-hand side click on the gear icon and click on the word "Folders." Save this.

Go to the top gray bar and right click your mouse on "Contacts" and select open in new tab. On the top left-hand side click on the button that says "Get Neighborhood Data." This will automatically open in a new tab.

In the neighborhood data tab make sure the "Cell Phones" are selected, very important that it's selected and it will turn red.



Click the tiny circle beside “By Neighborhood.”

Enter the address you found on Matrix for your neighborhood using the house number, direction, street number and zip code. I avoid the city. Now click Search. If an address doesn't work you can try taking out the Direction and add City but normally you have to find a new address from Matrix. After it searches find the address below.

Click on the “Map Search.” To draw our polygon click the blue button on the top left “Freeform Plotting.”

Zoom in very close in the neighborhood using the plus and minus buttons on the bottom right-hand side. The reason we need to zoom in is to make sure we only get the homes we want and don't accidentally cross over and have homes on 2 calling list.

Compare our Matrix map first before drawing our map on the neighborhood search. We can tell on Matrix if there are townhomes, condos or apartments. Exclude the apartments. If the townhomes or condos are over 300k, then you will create a separate list specifically for that complex. Do not create list for townhomes or condos under 200k.

Click on the map and it will drop a red pin. Keep clicking on the map to drop more pins to create the boundary. You will want lots of pins so you can go around parks, commercial property, churches, streets, etc. and to get close to the homes. Don't drop pins on the street, stay close to the house boundaries.

After your map is completed, pull up your PowerPoint and take a screenshot of your map, rename the title and date.

Go back to the neighborhood data screen and then select the blue button on the bottom “View Available Prospects.” Select the tiny circle beside “All Records” and change the drop down tab from Espresso to Vulcan 7. Write down how many records are being downloaded, you can find this above the first tiny button “All Records” Click the large red “Download” button on the right. If it's over the limit you need to redo the map before downloading the contacts.

After the download has been completed, it will notify you. It can take awhile. Sometimes it will say timed out and not all was downloaded. Don't worry! Wait a few minutes and go to Vulcan 7 with the Folders and refresh the screen and we'll see how many it downloaded. Look for a folder that has a bunch of long letters and then look under the contracts column to see how many contacts were imported. You may need to wait a few more minutes and refresh the screen again and typically all the contacts will be downloaded.

Open the Call Tracking Google Spreadsheet. Place the name of the list at the bottom and you will normally need to add more than 1 row. Figure out how many lists are needed. Only 200 leads/contacts can be on 1 list. So if we have 946 contacts, we will need 5 list in total. 4 list will have 200 contacts and 1 list will have 46 contacts. Type in the first box the “subdivision name 1” then drag and pull the box until you have all needed.



Any lists under 200 add beside the name --- and the amount. For example: Pinehurst CC 1 – 69

Any list over 500k, 750k or 1M add beside the name or if the list has under 200 contacts add -- 500k+ (or 750k+ or 1M+). For example it should look like: Pinehurst CC 2 -- 750k+ or Pinehurst CC 1 – 69 –750k+. (The 69 indicates how many contacts is in the list since it's less than 200.)

Shorten long list names. For example NW for North West or for East Meadowbrook Heights 1, E MB Heights 1. When abbreviating something like Meadowbrook put to the side of the first list the full name of the subdivision. For Example: E MB Heights 1 – 125-- East Meadowbrook Heights 1. (The 125 indicates how many contacts is in the list since it's less than 200.)

Go back to the Vulcan 7 folder tab. Find the new list and rename it to our subdivision that was on our Call Tracking spreadsheet (use the short subdivision name) and add the date. Next, go to the top left and click the orange “New Folder” tab. Add each additional folder needed for the list and title it with the subdivision name and add 2, 3, 4, 5, etc. After all are added go to the top left again and click the Reorder button. Scroll to the bottom and click on the subdivision and drag and pull to place it under the first one. Repeat until they are all in order.

Once they are all in order click on the other Vulcan 7 tab that has the contacts. Refresh screen. On the left-hand side scroll down to locate your new calling list and click on the subdivision name 1.

On the top left side beside the orange “Begin Dial Session” button click the tiny box. Now click on the “Move” tab and select the folder you want to move to for example Subdivision 2. Repeat until all the folders have 200 and the first folder has 200 or less.

Verify each folder has the correct amount of contacts and it was transferred correctly. On the left side click on the subdivisions name and wait until the page loads and look on the top right to see how many contacts are there. Repeat for each folder. Make sure you can read the whole subdivision name including the number.

You are now done with this list. Continue with each neighborhood. I recommend completing a section or ending in an area that is easy to locate with a park or golf course. After you are finished for the day or you stop in the middle of your list project take a screenshot and paste it into the word doc, so you know where to restart next time.