SETTING UP YOUR CHIME

Start Your Chime IDX Website

After logging into your Chime CRM account, you can start to build your website through the **CMS** (**C**ontent **M**anagement **S**ystem). To avoid delays with connecting your MLS(s) to your Chime IDX website, you will want to get started as soon as possible.

Complete Your Chime Profile, Email Signature

Setting up the Chime Profile is a key step in making sure your account is ready to go before interacting with clients via the CRM. The fields that can be edited in this section will be displayed in emails sent from the Chime CRM, including Property Alerts and Welcome Emails, so it is very important to have your profile set up from the very beginning.

Choose Your Preferences

This article is a quick guide to help you get your user preferences set up as you get started with Chime. The preferences include your time zone, working hours, email name, additional emails, and notifications.

My Vs. Team Dashboards

When you first log into Chime, you will start at the Chime Dashboard Page. Depending on your role/permissions within a team, you will see a different version of the Dashboard: Team Dashboard and/or My Dashboard. Both dashboards are explained in this article.

- Team Dashboard
- My Dashboard
- Company Dashboard
- Group Dashboard

Creating Custom Roles

Team Owners/Admin can create additional custom roles for their team members to fill when working with individual leads. Each additional role will appear in the bottom-left section of a lead profile called "Assigned to".

How to Invite a Lender

Chime allows real estate agents and teams to partner with mortgage lenders for a seamless process of providing leads with home-buying and loan resources all at once. The lender access is slightly limited because it does not use the established seat limit available with a purchased package.

Lenders/Agents will have access to add notes, @tag, and collaborate with other Chime Users within their team. Lenders do not have the ability to add additional contact information, delete the lead, etc.

- Lender Types
- Inviting a Lender
- Lender Page

Set Up Your Integrations

This provides you with a list of Integrations that are available with Chime. This continues to expand so if you don't see what you are looking for here, please click the title and it will take you to the most current list of integrations offered by Chime.

- Google My Business Integration
- HomeLight Integration
- Apination / API Nation Integrations
- Zapier Zaps + Smart Plans
- Auctm Integration
- Managing Authorization by Third-Party Apps & Services
- Sisu Integration
- Revaluate Integration
- Dubb Integration
- BombBomb Integration
- Gmail Email Integration
- Microsoft Outlook Calendar Integration
- Google Calendar Integration
- Zapier Integration
- Brokermint Integration
- Office 365 Email Integration
- Ylopo Integration
- Microsoft Teams Incoming Webhook Connection
- Aidentified Integration
- SkySlope Integration
- Slybroadcast Integration
- IMAP/SMTP Email Integration
- CloudCMA Integration
- Dotloop Integration
- Send Facebook Leads to Chime via Zapier
- Connecting MailChimp to Chime
- How to Add Grammarly to Your Browser

Setting Your Company Number

A "Company Number" is a virtual number that is shared by all team members on a Chime team. This is different from what is referred to as a "Personal Number" which is the virtual number that belongs to and is utilized by an individual user. A "Company Number" is simply a virtual number and does not have its own allocated usage. Usage (call minutes or text messages) is still pulled from an individual user's associated call/text package (included or added-on).

Please also note that in order to have a Personal Number, you will need to upgrade your text/call package which includes the use of a Personal Number.

- Company Number Settings
  - Purchasing additional Company Numbers
  - Source and Tag for Company Number
- Outbound Logic
  - Outbound Manual Texts
  - Outbound Auto Texts
  - Outbound Calls
- Inbound Logic
  - Existing Leads
  - Unknown Leads
  - Duplicate Phone Number

Add or Remove Team Members on Chime

Every real estate team experiences changes in agents, structure, etc. Chime allows you to quickly add/remove members of your team to keep the roster clean and accurate, and to easily reassign leads as necessary.

- Add Team Members
  - Steps to Add Team Members
  - Paying for Additional Seats
- Remove Team Members
  - Deleted User Lead Activities
- User Activity Log
- Display Only Agents
- Adding Agents as Leads

Permissions

This article was written for Account Owners/Admins and provides guidance on the different levels of permissions that are available within a team. Some permissions are enabled by default, but all teams are different. This is why permissions are maintained at an individual team level.

- Where to Edit Permissions
- Explanation of Individual Permissions
  - Manage User
  - Manage Team Website
  - Access All Team Leads
  - Add Private Leads
  - Delete Leads
  - Export Leads
  - Team Filter
  - Team Templates
  - Team Features
  - Edit Own Website
  - Add Landing Pages
  - Partial Lead Conversion