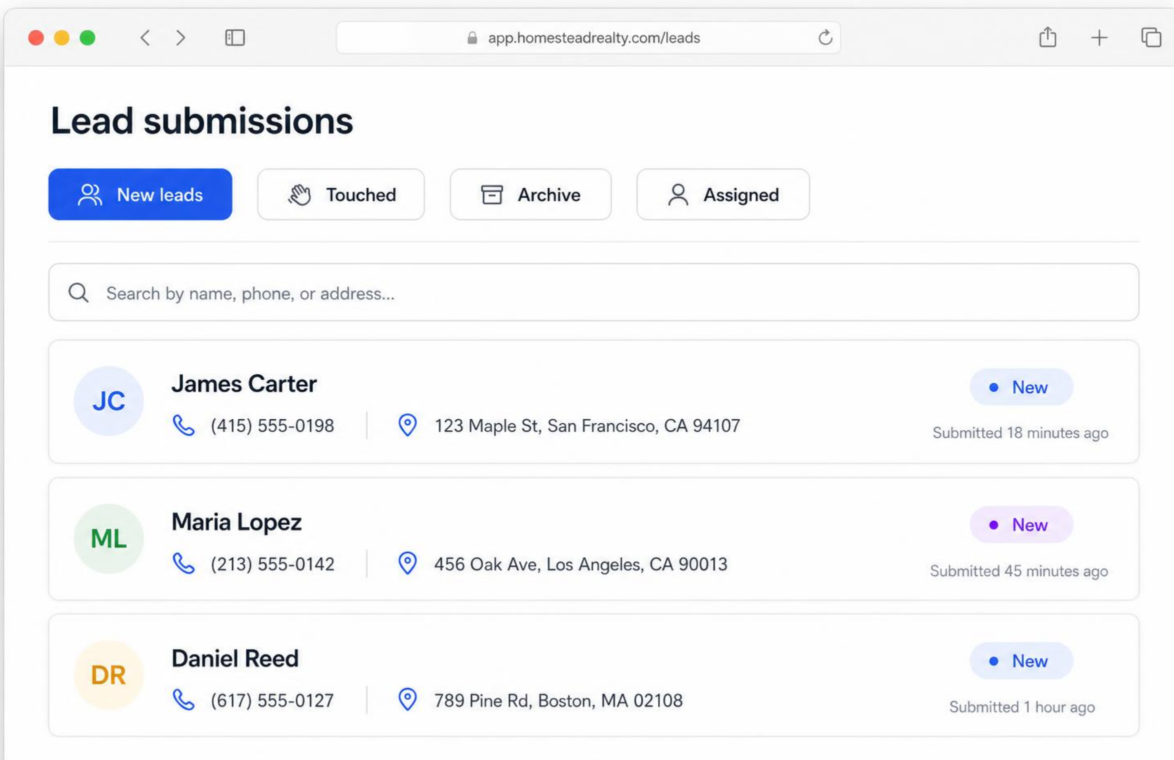
KMFCRE PLATFORM

Training Manual

A step-by-step guide to every tool in the KMFCRE platform — Lead Submissions, Lead Generator, Lead Evaluator, Custom Skip Tracing, and the KMFCRE DASH CRM — and how leads flow between them.



KMF Commercial Real Estate

kmfcre.com

Contents

01 — How the tools work together

Every KMFCRE tool hands off cleanly to the next one. Read this flow once and the rest of the manual clicks into place.

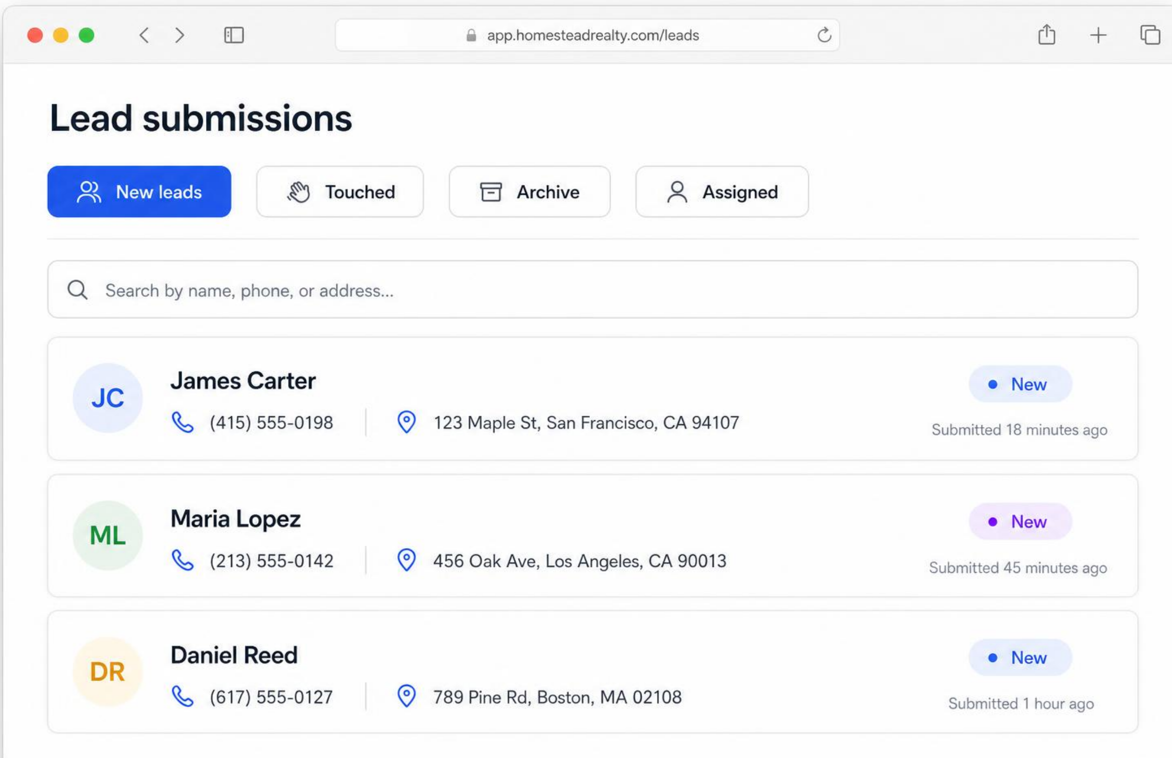
1. Lead Generator	Pulls off-market properties from data sources.
2. Lead Submissions	The inbox where every lead lands — generated, manual, cold call, or web form.
3. Lead Evaluator	Underwrites a property in seconds and produces a shareable Snapshot.
4. Custom Skip Tracing	Finds the real owner behind a property — phone, email, mailing.
5. KMFCRE DASH	CRM layer — Cases, Deals, Contacts, Tasks, and team assignment.

02 — INBOX

Lead Submissions

The home base for every lead you collect.

Lead Submissions is your inbox. Every web form-fill, every manually entered lead, every cold-call note, and every lead saved from the Lead Generator lands here. You'll spend most of your day on this page.



The Lead Submissions inbox — tabs for New, Touched, Archive, and Assigned views.

How to use Lead Submissions

1. Open Lead Submissions from your dashboard — it's the page you land on after signing in.
2. Use the tabs at the top to switch between **New**, **Touched**, **Archive**, and **Assigned** views.
3. Tap **Filters** to narrow by Type (Buyer, Seller, Investor, Wholesaler, Realtor, Student) or Source.
4. Click any **Lead Card** to expand it and read the full property details, contact info, and team notes.
5. Use **Add Lead** to type a lead in by hand, or **Cold Call Entry** to log a call you just made.

6. Open the **Actions** menu on any Lead Card to share it, send a Property Snapshot, push it to the Lead Evaluator, or **Send to CRM**.
7. Archive completed leads so the New tab stays focused on what needs attention right now.

How it connects

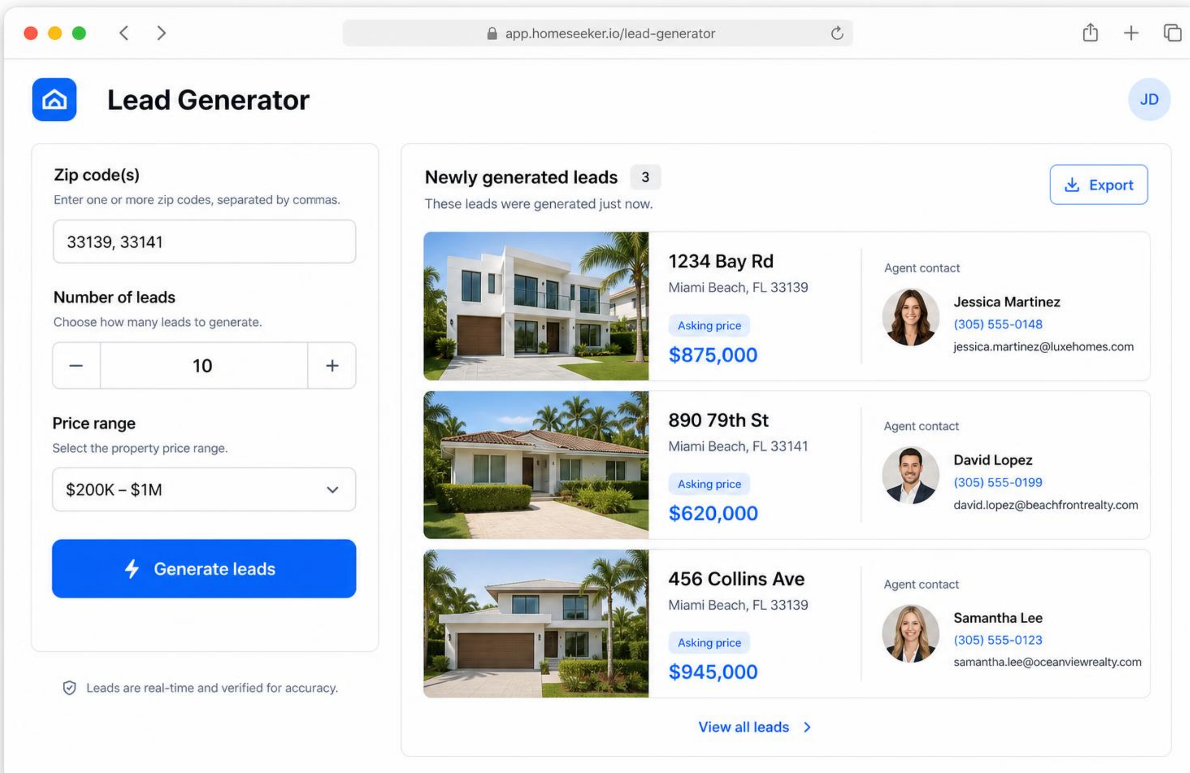
Lead Submissions feeds the Lead Evaluator (one click in the Actions menu) and KMFCRE DASH (Send to CRM, which creates a Case in your team's workspace).

03 — DISCOVERY

Lead Generator

Pull off-market leads straight from the data sources.

The Lead Generator finds properties for you. Set filters — area, property type, distress signals — and it returns a list you can save straight into Lead Submissions.



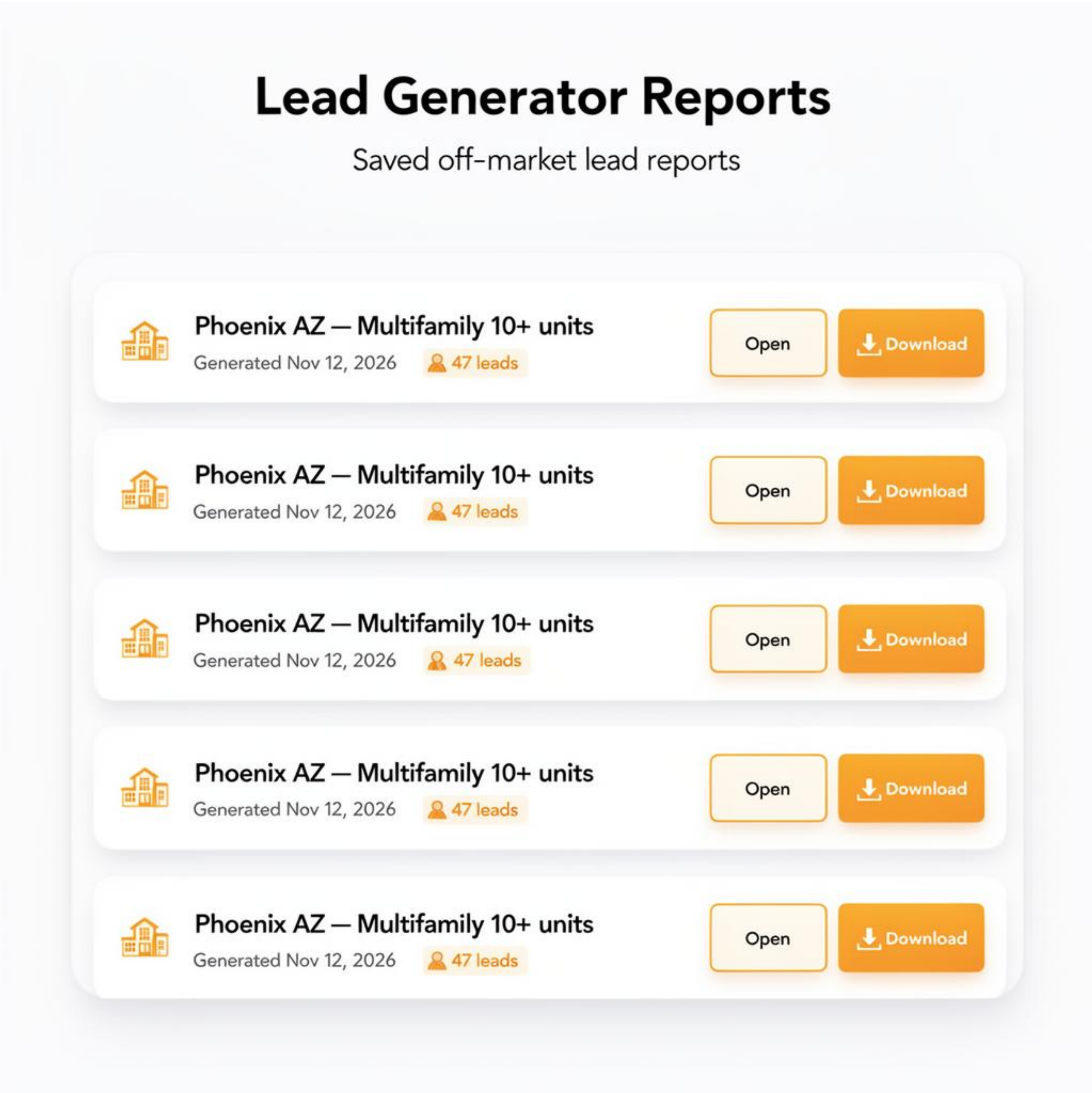
The Lead Generator search interface — filter, generate, and save results.

How to use Lead Generator

1. Open the Lead Generator from the **Tools** menu inside your dashboard.
2. Pick a generator mode that matches your play (RentCast pull, Distressed filter, or FSBO / Zillow listings).
3. Enter your search area — city, ZIP, or county — and choose property type and unit count.
4. Click **Generate** and review the results. Each row shows address, owner info, and key property details.

5. Hit **Save Lead** on any property that fits your buy box — it instantly appears on Lead Submissions under the **New** tab.
6. Rerun the search with different filters to widen or narrow your net.

Lead Generator — Reports & History



Lead Generator Reports — every past pull is saved so you can re-open and re-save.

1. Open the **Reports** tab inside the Lead Generator.
2. Click any saved report to re-open the full results list.
3. Use **Save Lead** on any row to push it into Lead Submissions, even weeks later.
4. Download the report as a PDF for your records or to share with a teammate.

How it connects

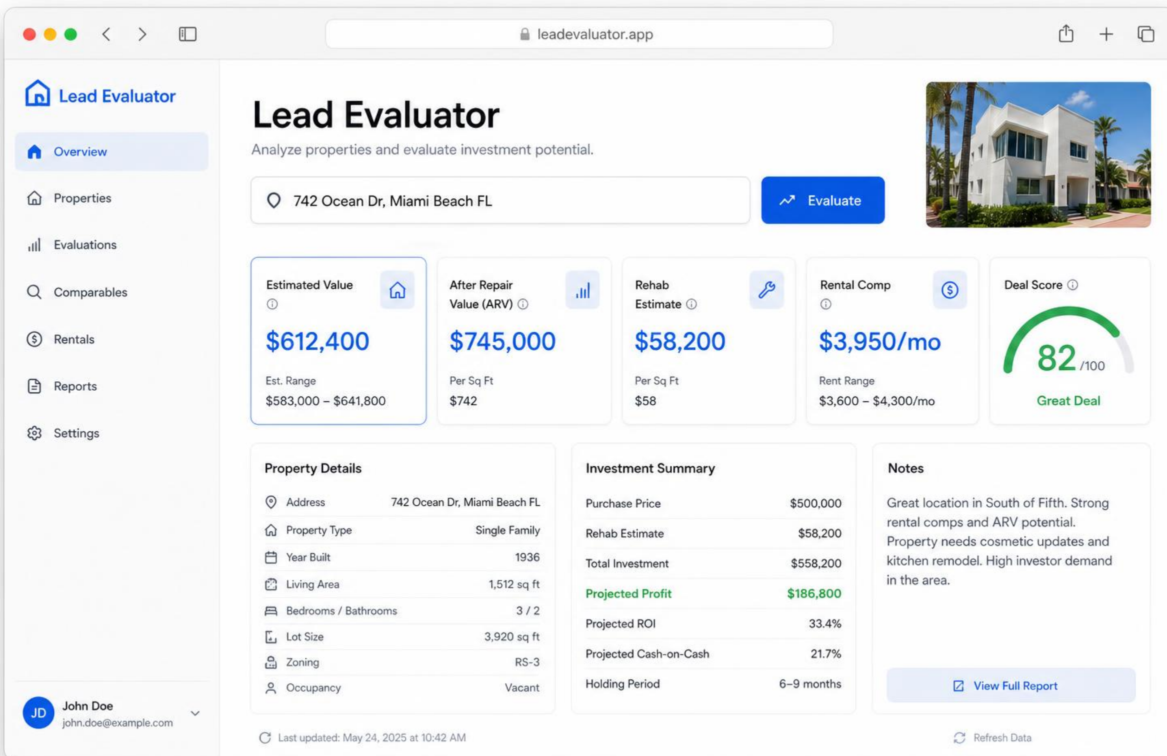
Every lead saved here flows straight into Lead Submissions, where you can evaluate, skip trace, or send it to KMFCRE DASH.

04 — UNDERWRITING

Lead Evaluator

Underwrite any property in seconds.

The Lead Evaluator is your underwriting calculator. Plug in an address, value, and a few details — it returns a clear deal analysis you can use to decide whether to move forward, walk away, or counter-offer.



The Lead Evaluator — inputs on the left, deal metrics and Snapshot on the right.

How to use Lead Evaluator

1. Open the Lead Evaluator from the **Tools** menu, or click **Evaluate** in any Lead Card's Actions menu.
2. If launched from a Lead Card, address, value, and unit count are pre-filled — just review and adjust.
3. Enter asking price, estimated repairs, and any rent or income figures you have.
4. Pick an exit strategy — **Buy & Hold**, **BRRRR**, **Flip**, or **Wholesale**.

5. Click **Evaluate** to see cash flow, cap rate, cash-on-cash return, and recommended offer range.
6. Use **Send Property Snapshot** to email a clean one-page summary to a buyer, partner, or seller.

How it connects

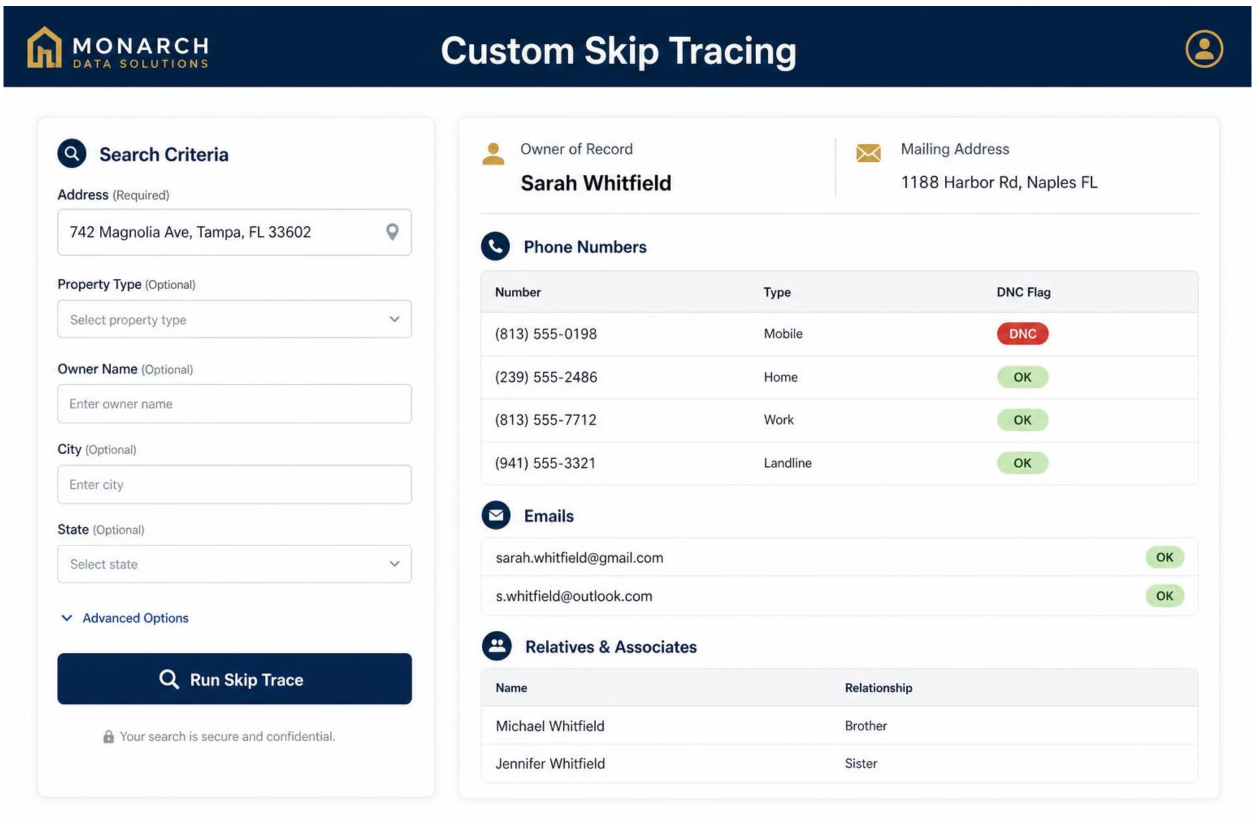
The Evaluator launches directly from a Lead Card's Actions menu and emails Property Snapshots to contacts stored in KMFCRE DASH.

05 — CONTACT DATA

Custom Skip Tracing

Find the owner behind any property.

Custom Skip Tracing pulls verified phone numbers, emails, and mailing addresses for the people connected to a property. Use it when public record only shows an LLC, or when you need a fresh number to start a conversation.

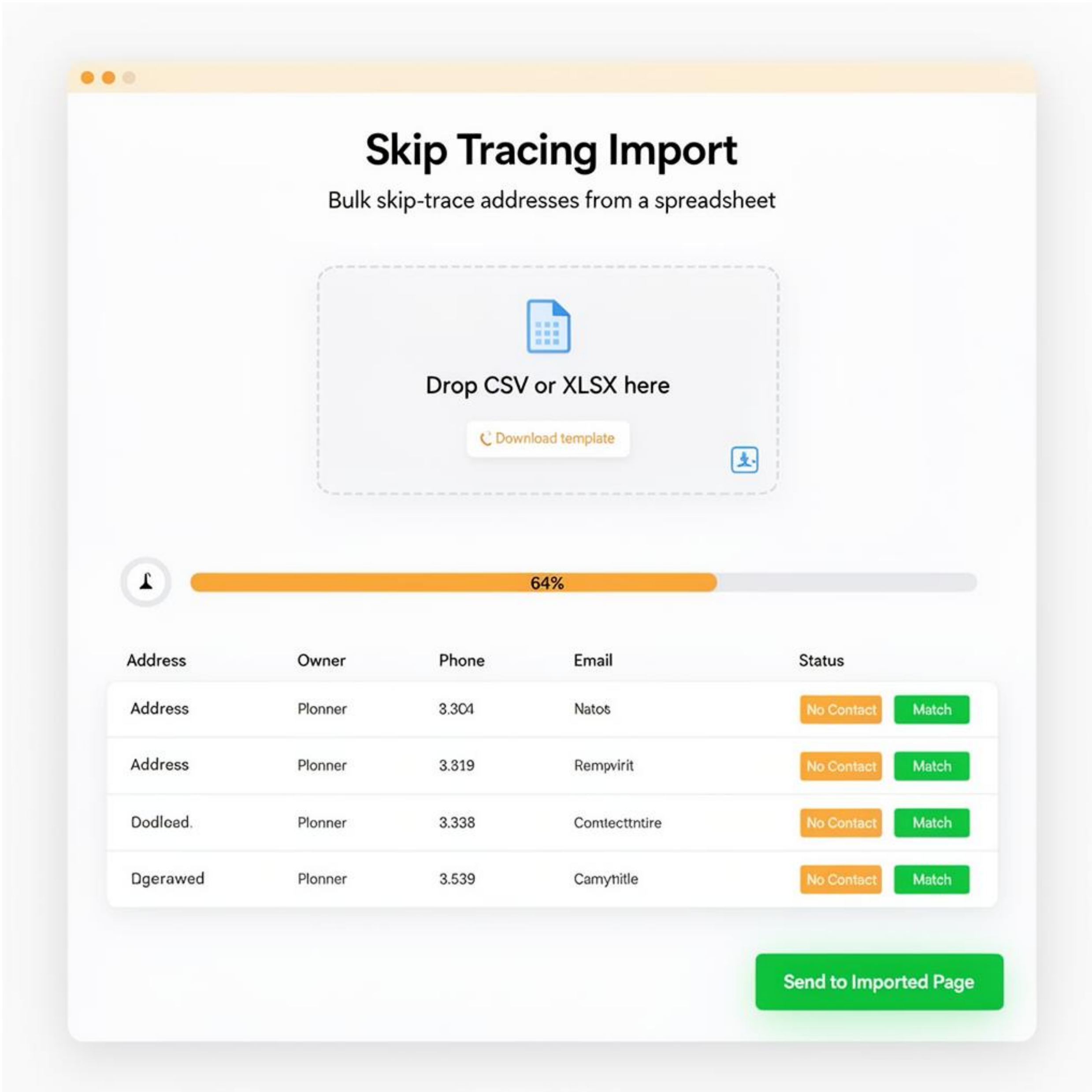


Custom Skip Tracing results — phones, emails, mailing, and likely relatives.

How to use Custom Skip Tracing

1. Open **Custom Skip Tracing** from the Tools menu inside your dashboard.
2. Enter the property address — and the owner name if you have it — then click **Run Skip Trace**.
3. Review the returned contacts: phones, emails, mailing addresses, and likely relatives.
4. Click **Save to Lead** to attach contact info to a new lead, or to an existing lead.
5. Use **Download Skip Trace PDF** when you want a clean record to keep with the file.

Custom Skip Tracing — Bulk Skip Tracing Import



Bulk Skip Tracing — upload a CSV of addresses and trace them in one batch.

1. Open the **Skip Tracing Import** page from the Tools menu.
2. Upload a CSV containing property addresses (and owner names when available).
3. Map the CSV columns to the required fields and click **Run Batch**.
4. Review the matched contacts and click **Save all to Leads** to push results into Lead Submissions.

How it connects

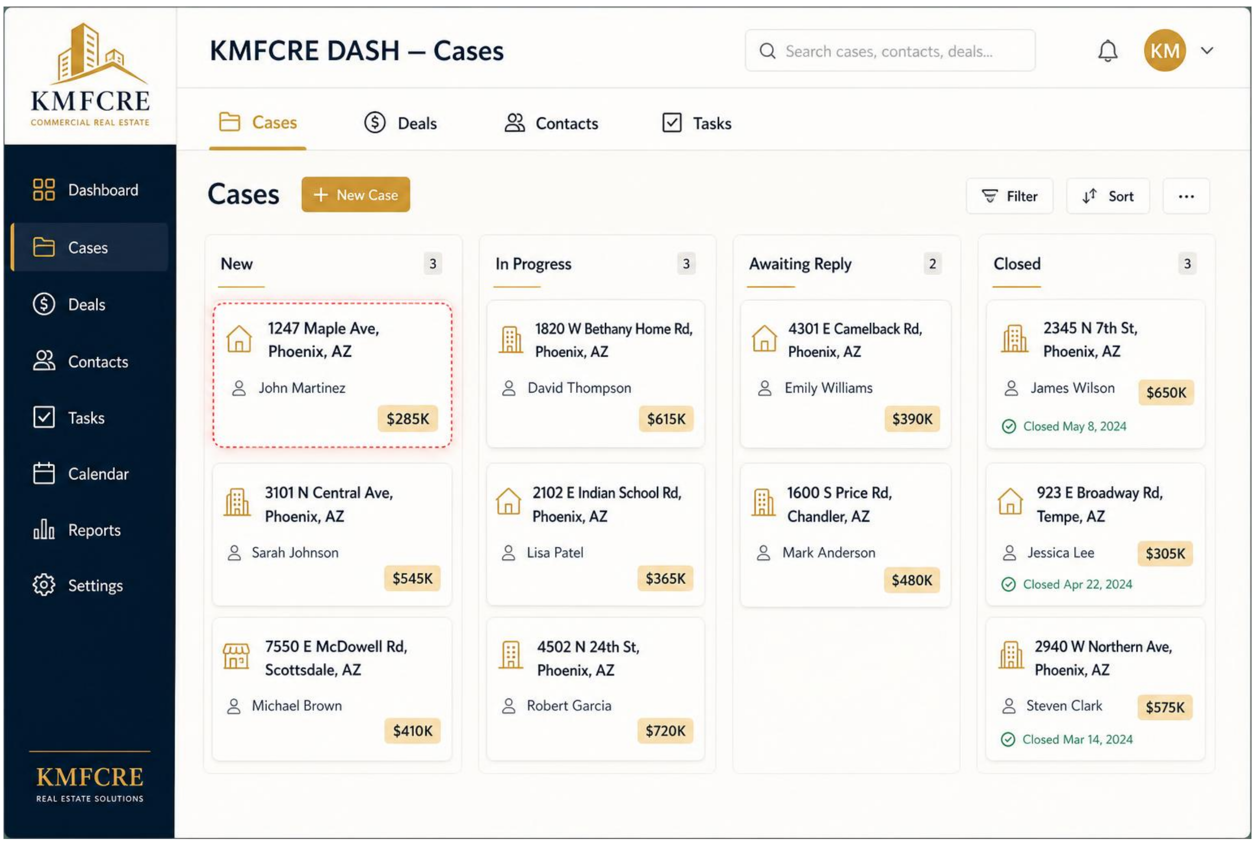
Skip Trace results can be saved as a new lead on Lead Submissions or attached to an existing lead, which flows into KMFCRE DASH when you send it to CRM.

06 — CRM

KMFCRE DASH

Your CRM for cases, contacts, deals, and your team.

KMFCRE DASH is the CRM layer. Once a lead is worth real follow-up, send it here — it becomes a **Case** you can track from first contact to closed **Deal**. Each team gets its own private workspace; only team members and the Team Administrator can see what's inside.



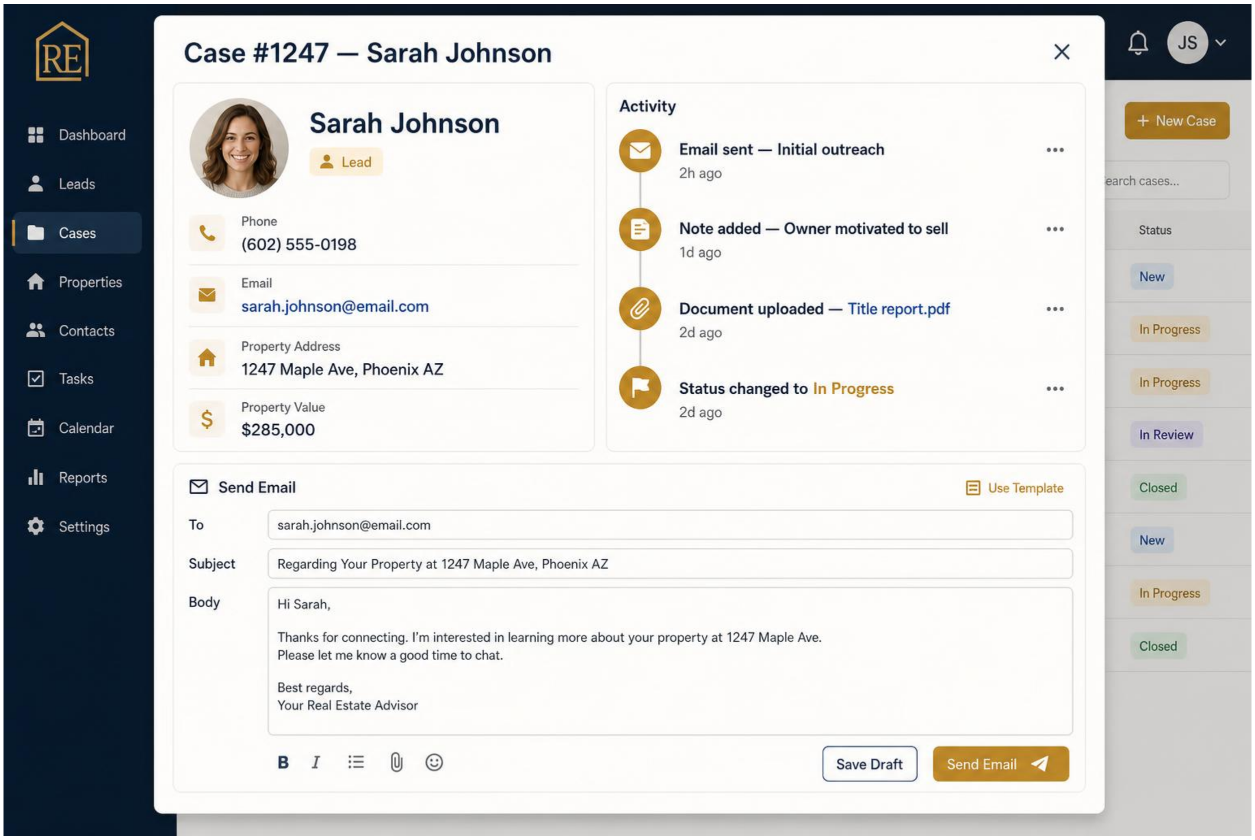
KMFCRE DASH — Cases tab showing your team's active pipeline.

How to use KMFCRE DASH

1. Open KMFCRE DASH from the **Tools** menu — you'll land on your team's workspace by default.
2. Use the workspace dropdown at the top to switch between any workspace you belong to.
3. Click the **Cases** tab to see leads you created or were assigned. Team Admins can toggle **Show Team Cases**.
4. Open a Case to add notes, attach documents, log emails, and update status.

5. Use the **Deals** tab to track active deals — pipeline stage, value, and expected close date.
6. Use **Contacts** and **Companies** to keep buyer, seller, and partner records organized.
7. Team Admins use the **Members** tab to assign cases to specific teammates.

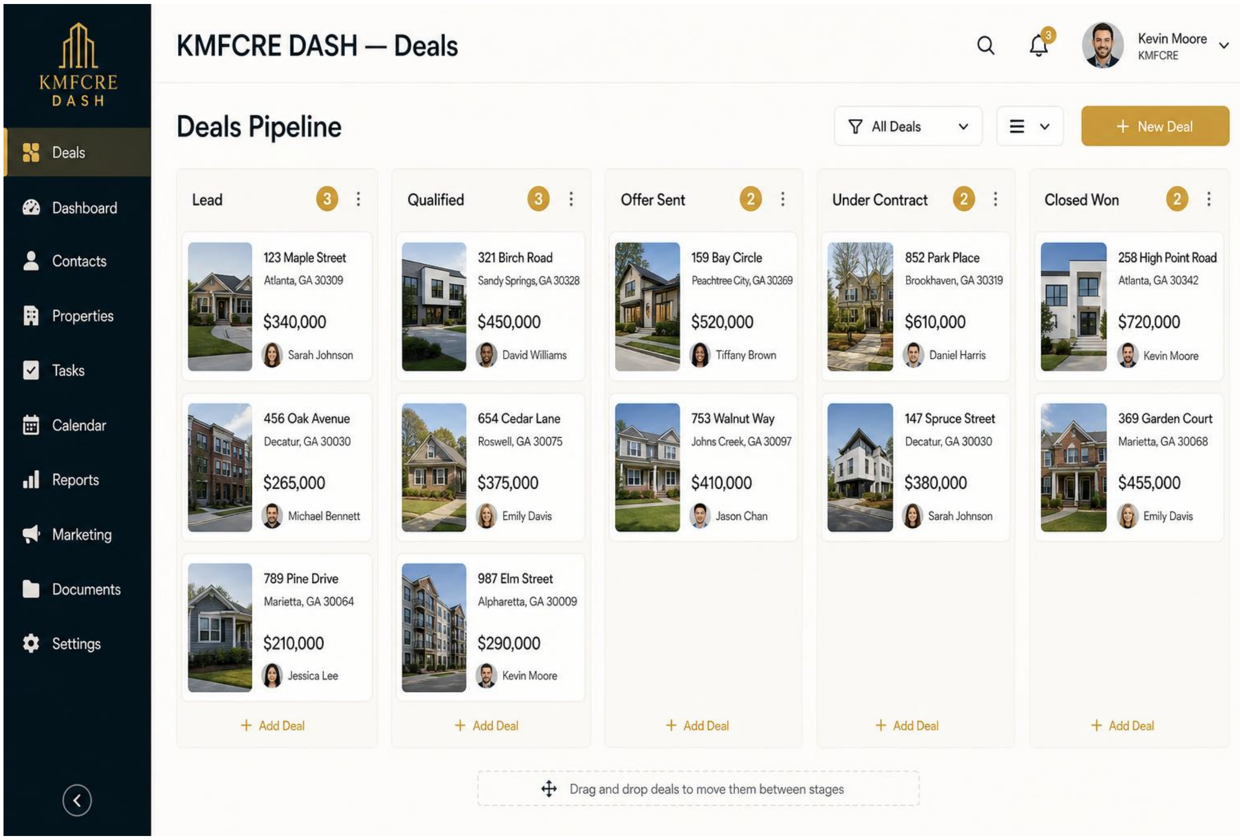
KMFCRE DASH — Case Detail



Inside a Case — notes, activity, attachments, and assignment in one view.

1. Click any row on the Cases tab to open the Case detail view.
2. Use **Add Note** to log a call, meeting, or update.
3. Drop files into **Attachments** — LOIs, PSAs, financials, photos.
4. Update the **Status** dropdown as the case progresses.
5. Click **Convert to Deal** when the case is ready to move into pipeline tracking.

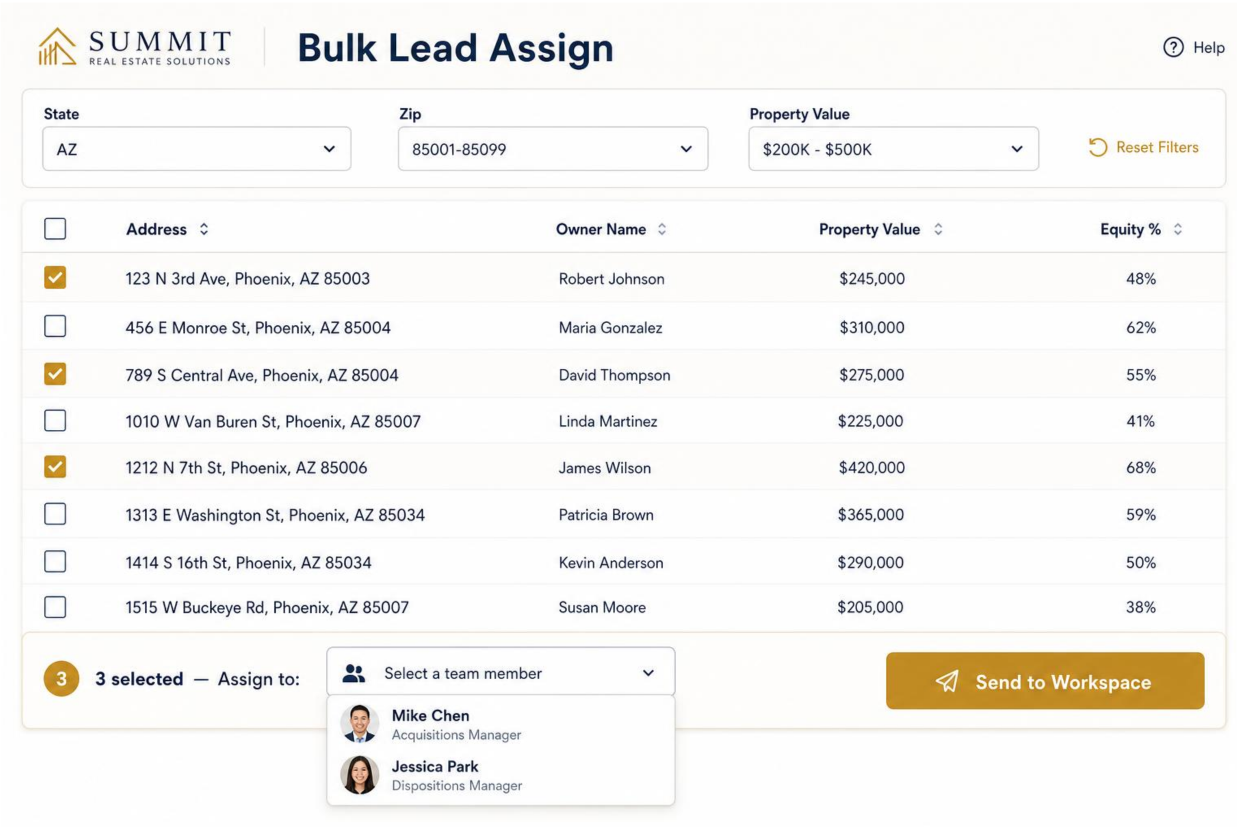
KMFCRE DASH — Deals Pipeline



The Deals pipeline — drag cards across stages from LOI to Closed.

1. Open the **Deals** tab to see every active deal across the team's pipeline.
2. Drag deal cards between stages — LOI, Under Contract, Due Diligence, Closing, Closed.
3. Click any deal to set expected close date, deal value, and assigned owner.
4. Use the stage playbook to see required next actions for each pipeline phase.

KMFCRE DASH — Bulk Lead Assign



Bulk Lead Assign — push a batch of leads to a teammate as Cases.

1. From KMFCRE DASH, open **Bulk Lead Assign**.
2. Select the leads you want to push from Lead Submissions.
3. Pick the teammate to assign them to.
4. Click **Assign** — each lead is created as a Case in that teammate's workspace.

How it connects

KMFCRE DASH receives Cases from Lead Submissions (Send to CRM and Bulk Lead Assign), and Cases convert into Deals when you're ready to close.

07 — End-to-end workflow

Putting it all together — a typical lead's journey through the KMFCRE platform.

1. Generate Use the Lead Generator to pull a list of distressed multifamily in your target ZIP.

2. Save Hit Save Lead on the strongest matches — they appear under New in Lead Submissions.

3. Skip Trace Run Custom Skip Tracing on the LLC-owned ones to find the real decision-maker.

4. Evaluate Open the Lead Evaluator from the Lead Card to underwrite the property.

5. Send Snapshot Email the Property Snapshot to your buyer list or partner.

6. Send to CRM When a seller responds, Send to CRM — the lead becomes a Case in KMFCRE DASH.

7. Work the Case Log notes, attach the LOI, and update status as the conversation moves.

8. Convert to Deal Once under contract, convert the Case to a Deal and drag it through pipeline stages to Closed.

That's the whole platform.

Bookmark the in-app version of this guide at **/how-to-use-kmfcre-tools** and share it with new teammates — it's everything they need to get productive on day one.

08 — BUYERS

Buyers Dashboard

Buy boxes, buyer database, and shareable landing pages.

The Buyers Dashboard turns your investor list into a working pipeline. Build Buy Boxes (the criteria your buyers actually want), match properties to them, and publish a clean public landing page for each box — ready to send to sellers, brokers, or your social channels.

The Buyers Dashboard — your verified buyer database with search and filters.

Build a Buy Box

A Buy Box is one buyer's criteria — area, asset class, price band, unit count, cap-rate minimum, and any deal-breakers. Each box gets a public landing page you can share.

Buy Box workspace — criteria on the left, matched properties on the right.

How to build a Buy Box

1. Open the Buyers Dashboard from the Tools menu and click the Buy Boxes tab.
2. Click New Buy Box and give it a clear name (e.g. “Midwest 20-50 unit multifamily”).
3. Set criteria: target markets, asset class, price range, unit count, and cap-rate floor.
4. Save — the box is instantly given a public landing page URL you can share.
5. Add properties from the Properties tab, or use Add to Buy Box on any matching lead.

Properties tab

The Properties tab is the master list of every property your team has added — across every Buy Box. Removing a property from a Buy Box does NOT delete it from this list; use the Delete button here to fully remove a property.

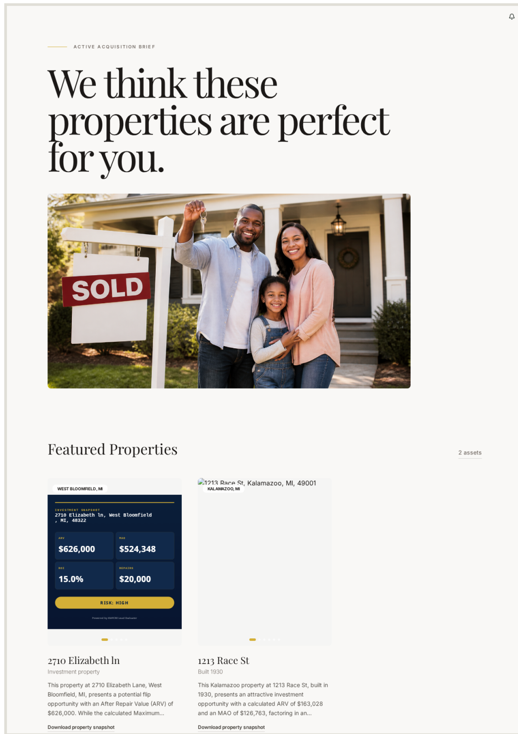
Properties tab — the master list, independent of Buy Box membership.

How to manage Properties

1. Open the Properties tab inside the Buyers Dashboard.
2. Use Add Property to enter a new property by hand, or Pick from Leads to import one.
3. Click any property to edit details, attach photos, and assign it to one or more Buy Boxes.
4. Removing a property from a Buy Box only detaches it — it stays in this list.
5. Use Delete on this page when you want the property gone for good.

Shareable Buy Box landing page

Every Buy Box gets a clean, public landing page at kmfcre.com/bb/<slug>. Share it with sellers, brokers, or post it anywhere — inquiries land directly in your Lead Submissions inbox.



Public Buy Box landing page — criteria, matched properties, and inquiry form.

How it connects

Inquiries from a Buy Box landing page flow into Lead Submissions as new leads, tagged with the originating Buy Box. From there they can be sent to the Lead Evaluator, Skip Traced, or pushed to KMFCRE DASH as a Case — the same flow every other lead uses.