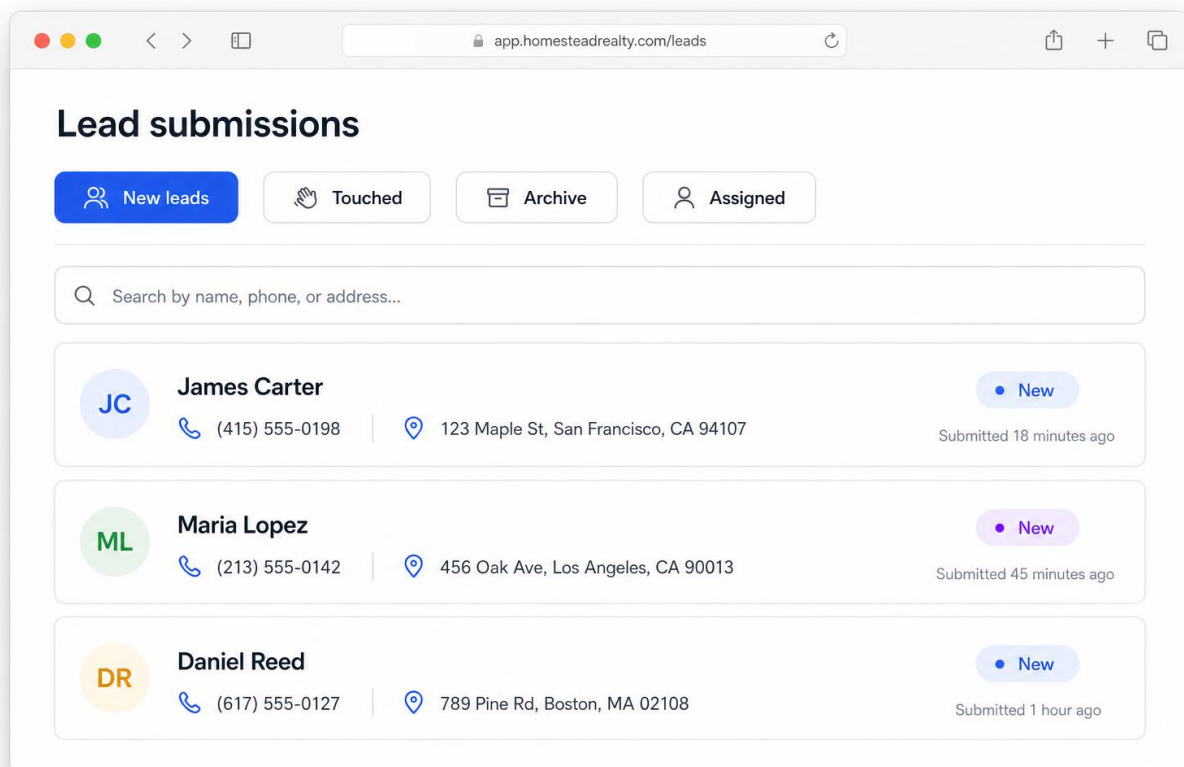


KMFCRE PLATFORM

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

kmfcrc.com

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01 — How the tools work together

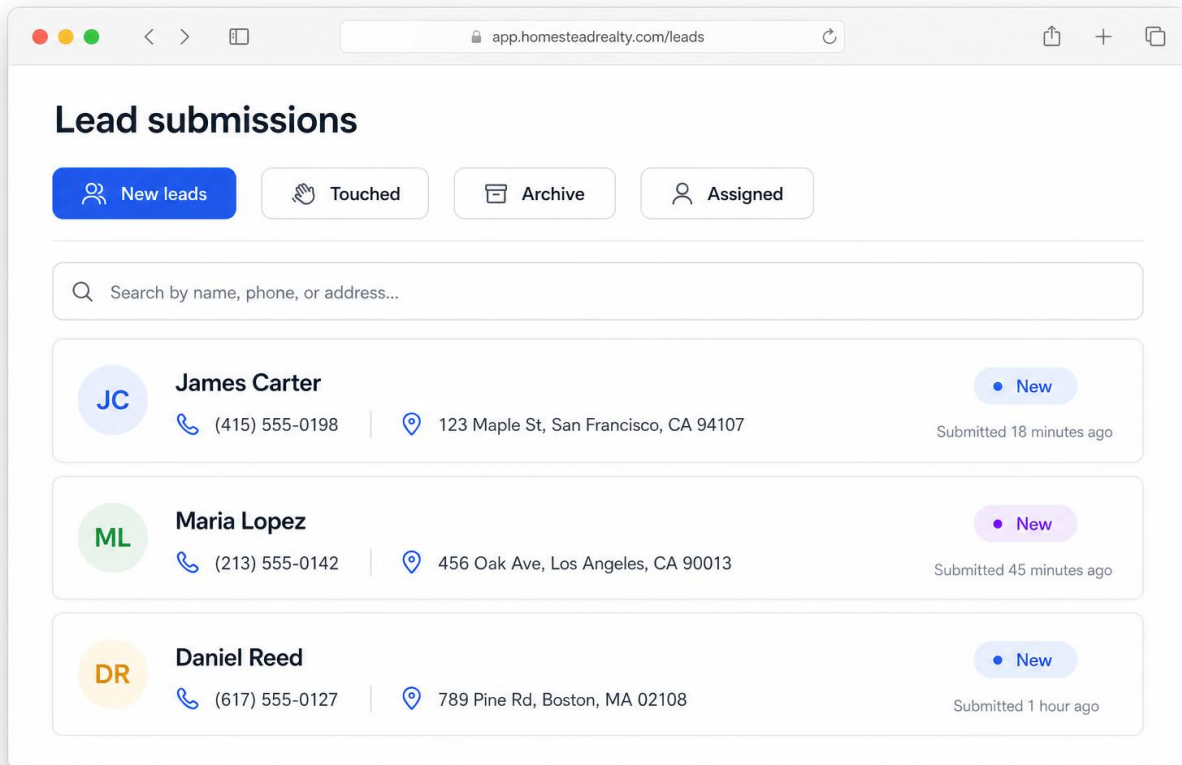
Every KMFCRE tool hands off cleanly to the next one. Read this flow once and the rest of the manual clicks into place.

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.

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).

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 screenshot shows a web browser window with the URL `app.homeseecker.io/lead-generator`. The interface is titled "Lead Generator" and includes a user profile icon "JD" in the top right. On the left, there are three filter sections: "Zip code(s)" with a text input containing "33139, 33141", "Number of leads" with a numeric input set to "10", and "Price range" with a dropdown menu set to "\$200K - \$1M". Below these filters is a blue button with a lightning bolt icon and the text "Generate leads". A small note at the bottom left states "Leads are real-time and verified for accuracy." On the right, a section titled "Newly generated leads" with a count of "3" displays three property listings. Each listing includes a photo, address, location, asking price, and agent contact information. An "Export" button is located at the top right of the leads section. A "View all leads" link is at the bottom of the leads section.

Property Image	Address	Location	Asking Price	Agent Contact
	1234 Bay Rd	Miami Beach, FL 33139	\$875,000	Jessica Martinez (305) 555-0148 jessica.martinez@luxehomes.com
	890 79th St	Miami Beach, FL 33141	\$620,000	David Lopez (305) 555-0199 david.lopez@beachfrontrealty.com
	456 Collins Ave	Miami Beach, FL 33139	\$945,000	Samantha Lee (305) 555-0123 samantha.lee@oceanviewrealty.com

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

Saved off-market lead reports



Phoenix AZ — Multifamily 10+ units
Generated Nov 12, 2026  47 leads

Open

Download



Phoenix AZ — Multifamily 10+ units
Generated Nov 12, 2026  47 leads

Open

Download



Phoenix AZ — Multifamily 10+ units
Generated Nov 12, 2026  47 leads

Open

Download



Phoenix AZ — Multifamily 10+ units
Generated Nov 12, 2026  47 leads

Open

Download



Phoenix AZ — Multifamily 10+ units
Generated Nov 12, 2026  47 leads

Open

Download

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.

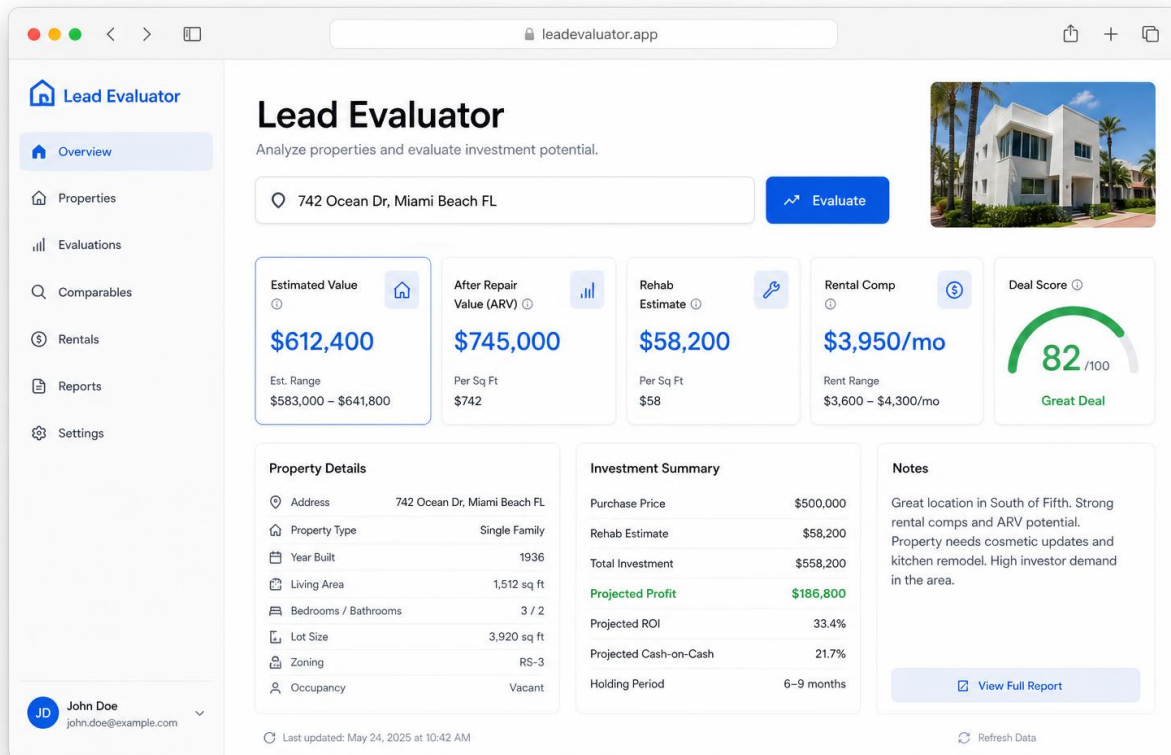
How it connects

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

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.

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




Search Criteria

Address (Required)

Property Type (Optional)

Owner Name (Optional)

City (Optional)

State (Optional)


Advanced Options




 Your search is secure and confidential.


Owner of Record
Sarah Whitfield


Mailing Address
 1188 Harbor Rd, Naples FL


Phone Numbers

Number	Type	DNC Flag
(813) 555-0198	Mobile	DNC
(239) 555-2486	Home	OK
(813) 555-7712	Work	OK
(941) 555-3321	Landline	OK


Emails

sarah.whitfield@gmail.com	OK
s.whitfield@outlook.com	OK


Relatives & Associates

Name	Relationship
Michael Whitfield	Brother
Jennifer Whitfield	Sister

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

Skip Tracing Import

Bulk skip-trace addresses from a spreadsheet



Drop CSV or XLSX here

Download template





64%

Address	Owner	Phone	Email	Status
Address	Plonner	3.304	Natos	No Contact Match
Address	Plonner	3.319	Rempvirit	No Contact Match
Dodload.	Plonner	3.338	Contectnttire	No Contact Match
Dgerawed	Plonner	3.539	Camyhttle	No Contact Match

Send to Imported Page

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.

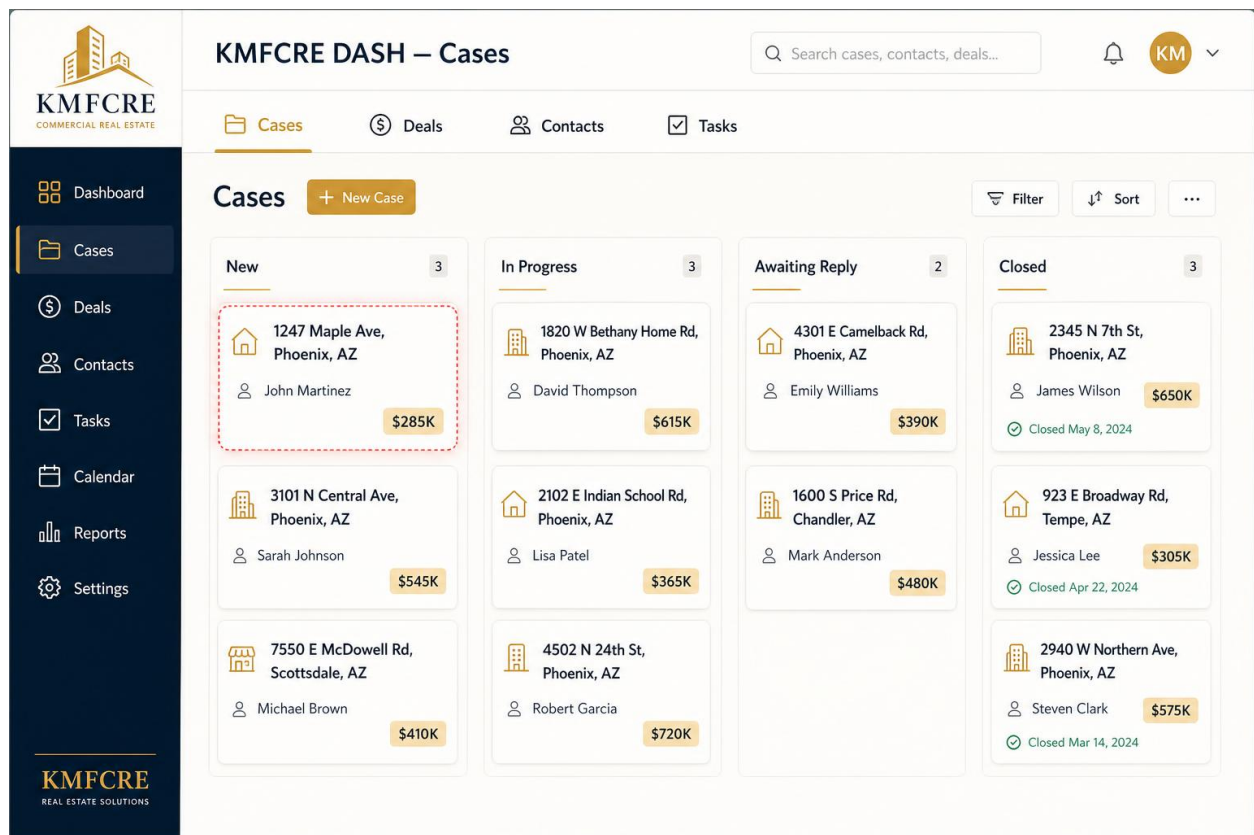
How it connects

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.

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

The screenshot displays the 'Case #1247 — Sarah Johnson' interface. On the left is a dark sidebar with navigation links: Dashboard, Leads, Cases (highlighted), Properties, Contacts, Tasks, Calendar, Reports, and Settings. The main content area is divided into three sections. The top section shows the case title and a close button. The middle section contains a profile card for Sarah Johnson, marked as a 'Lead', with contact details: Phone (602) 555-0198, Email sarah.johnson@email.com, Property Address 1247 Maple Ave, Phoenix AZ, and Property Value \$285,000. To the right of the profile card is an 'Activity' log with four entries: 'Email sent — Initial outreach' (2h ago), 'Note added — Owner motivated to sell' (1d ago), 'Document uploaded — Title report.pdf' (2d ago), and 'Status changed to In Progress' (2d ago). The bottom section is a 'Send Email' form with fields for To (sarah.johnson@email.com), Subject (Regarding Your Property at 1247 Maple Ave, Phoenix AZ), and Body (Hi Sarah, Thanks for connecting. I'm interested in learning more about your property at 1247 Maple Ave. Please let me know a good time to chat. Best regards, Your Real Estate Advisor). The form includes a 'Use Template' link, a 'Save Draft' button, and a 'Send Email' button with a paper plane icon. On the far right, a partial view of a case list shows a search bar, a '+ New Case' button, and a status dropdown menu with options: New, In Progress, In Review, Closed, and a 'Status' filter.

Case #1247 — Sarah Johnson

Sarah Johnson Lead

Phone: (602) 555-0198

Email: sarah.johnson@email.com

Property Address: 1247 Maple Ave, Phoenix AZ

Property Value: \$285,000

Activity

- Email sent — Initial outreach (2h ago)
- Note added — Owner motivated to sell (1d ago)
- Document uploaded — Title report.pdf (2d ago)
- Status changed to **In Progress** (2d ago)

Send Email Use Template

To: sarah.johnson@email.com

Subject: Regarding Your Property at 1247 Maple Ave, Phoenix AZ

Body: Hi Sarah,
Thanks for connecting. I'm interested in learning more about your property at 1247 Maple Ave. Please let me know a good time to chat.
Best regards,
Your Real Estate Advisor

B I 🔗 😊 Save Draft Send Email

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

KMFCRE DASH — Deals

Deals Pipeline

Lead (3) Qualified (3) Offer Sent (2) Under Contract (2) Closed Won (2)

Lead	Qualified	Offer Sent	Under Contract	Closed Won
 123 Maple Street Atlanta, GA 30309 \$340,000 Sarah Johnson	 321 Birch Road Sandy Springs, GA 30328 \$450,000 David Williams	 159 Bay Circle Peachtree City, GA 30069 \$520,000 Tiffany Brown	 852 Park Place Brookhaven, GA 30319 \$610,000 Daniel Harris	 258 High Point Road Atlanta, GA 30342 \$720,000 Kevin Moore
 456 Oak Avenue Decatur, GA 30030 \$265,000 Michael Bennett	 654 Cedar Lane Roswell, GA 30075 \$375,000 Emily Davis	 753 Walnut Way Johns Creek, GA 30097 \$410,000 Jason Chan	 147 Spruce Street Decatur, GA 30030 \$380,000 Sarah Johnson	 369 Garden Court Marietta, GA 30068 \$455,000 Emily Davis
 789 Pine Drive Marietta, GA 30064 \$210,000 Jessica Lee	 987 Elm Street Alpharetta, GA 30009 \$290,000 Kevin Moore			

+ Add Deal

Drag and drop deals to move them between stages

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

Help

State
AZ

Zip
85001-85099

Property Value
\$200K - \$500K

Reset Filters

☐	Address	Owner Name	Property Value	Equity %
☒	123 N 3rd Ave, Phoenix, AZ 85003	Robert Johnson	\$245,000	48%
☐	456 E Monroe St, Phoenix, AZ 85004	Maria Gonzalez	\$310,000	62%
☒	789 S Central Ave, Phoenix, AZ 85004	David Thompson	\$275,000	55%
☐	1010 W Van Buren St, Phoenix, AZ 85007	Linda Martinez	\$225,000	41%
☒	1212 N 7th St, Phoenix, AZ 85006	James Wilson	\$420,000	68%
☐	1313 E Washington St, Phoenix, AZ 85034	Patricia Brown	\$365,000	59%
☐	1414 S 16th St, Phoenix, AZ 85034	Kevin Anderson	\$290,000	50%
☐	1515 W Buckeye Rd, Phoenix, AZ 85007	Susan Moore	\$205,000	38%

3 selected — Assign to:

Select a team member

Mike Chen
Acquisitions Manager

Jessica Park
Dispositions Manager

Send to Workspace

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-kmfcree-tools**](#) and share it with new teammates — it's everything they need to get productive on day one.

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.



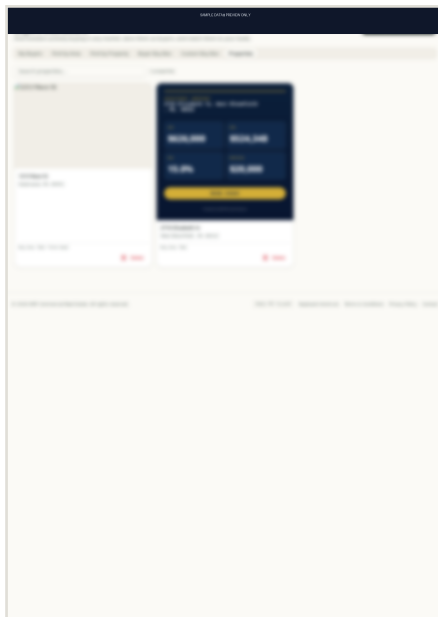
Buy Box workspace — criteria on the left, matched properties on the right.

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.



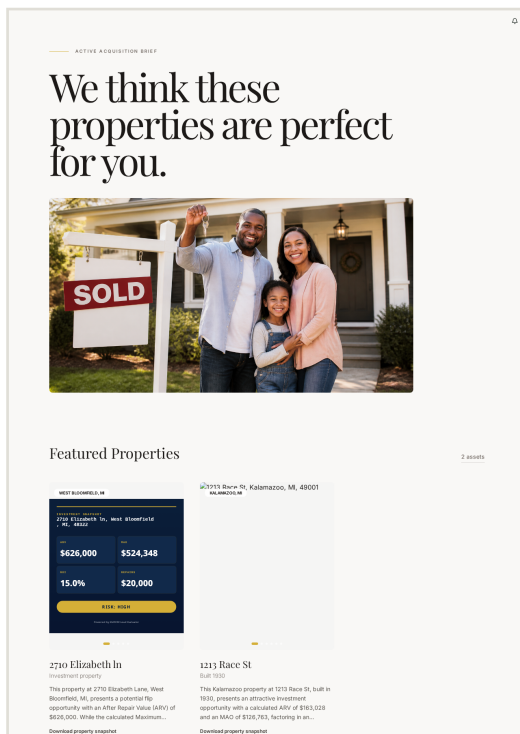
Properties tab — the master list, independent of Buy Box membership.

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 kmfcres.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.