USER GUIDE

sphere

REAL ESTATE CRM

Sphere Manual

Complete user manual and documentation — from importing your contacts to automating your marketing.

Sphere Manual

TOPICS

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GETTING STARTED - IMPORTING & SYNCING

Getting all your contacts into Sphere, syncing your calendar and email, downloading the Sphere App, and setting a goal for the year are the most important first steps.

Importing Contacts

It's important to be selective about which contacts you bring into Sphere. Bringing in hundreds of potential leads from years ago that you never got any traction with will dilute Sphere's effectiveness.

CSV Upload

- Go to People > Import (button on the top right). Then go to the Import from CSV section and select the CSV file of contacts you want to import.
- Sphere has a field mapping tool that will help you map the fields in your CSV into the correct fields within Sphere.
- You can also download a Sample CSV in this section.

Gmail or Microsoft Contact Import

Navigate to People > Import (button in the top right corner). There is a section for importing from Microsoft and another from Gmail.

Check for Duplicates

After your contacts have been imported, check for duplicates. There is a small, gray link on the top of the People page near the import button - **"Find Duplicates"**. You can then either merge, merge as a connection (spouse/partner), or ignore.

> ⚠ If you are going to use the *Merge All* button in the top left, make sure you look through all the potential duplicates first. Some may not actually be duplicates, and one of the merged contacts will be erased.

CALENDAR SYNC

There are two ways to get to this. Go to Settings > Calendar or just click on Calendar on the main menu. There is an “Add Calendar” button at the top of both pages.

Once you have setup your calendar, go to Settings > Calendar and decide on the items you want to sync.

SPHERE APP

Go to the Apple App Store or Google Play Store and search for **“Sphere Real Estate”** and the Sphere app should be the first result. Download it on your phone and log in.

Download on the App Store

Get it on Google Play

GOALS

- Setting a goal for the year may be the most important aspect of getting Sphere set up. We've tried to make this incredibly quick and intuitive.
- Click on the **Set a Goal** link near the top right on the dashboard. The first time it works as a wizard and asks you one question at a time.
- Don't spend a lot of time worrying about getting exactly the right answer. It should only take 3-4 minutes. And you can always come back and tweak as much as you like.
- Once your contacts are imported and your business plan is filled out, you're ready to go.

DASHBOARD

The dashboard is where you start when you login every day. It shows all your high-level stats, how you are tracking against your goals, and provides a list of referral calls each day on the To Do list.

- The referral calls are only for people you haven't called (or been in a transaction with) in the last 90 days. And anyone with **Rank X** will never show up on this list (Rank X is for colleagues, vendors, etc.).
- You can click on the 3 dots on the To-Do list items to assign team members to the item or add a due date.

TODAY

Every morning, the Today page shows you what's going on today as well as what's coming up that you should be aware of, e.g. birthday, housiversaries in the next couple of weeks.

You can send handwritten cards to multiple clients at once directly from the Today page.

A Today update is sent to your phone via push notification, email, or text each morning (set this up in Settings > Notifications).

PEOPLE

This is the core functionality most people associate with a CRM. It's where all your contact profiles are stored.

Adding People

- You can always import people in bulk via a CSV, from your phone, or from Gmail and Outlook.
- To add new contacts one at a time in Sphere, click on the **'+' button** on the top menu, or click the "Add People" button on the top right of the People page.
- There are two ways to add people. One is for you to type in all the information you have for them into the People page fields.

Intake Form

The second way is to add their first name and email address and toggle on the **"Send Intake Email"** switch. This sends an email with an intake form to the new contact.

Pro Tip: You can send an intake form to multiple people or your entire database at once.

Ross does this every year around the holidays. He sends out an intake note that says, "Hey, I can't believe it's almost 2026. I would love to send you a holiday card and celebrate your birthday this year. Can you just make sure my information is up to date?" Over the next few weeks, hundreds of clients update their profiles with birthdays, favorite books, favorite movies, social media links, kids' birthdays, pets' names, etc.

Lead Source

Remember to record the "Lead Source" or who referred them when adding a new contact. This allows you to easily run reports showing how your business is growing.

Mass Actions

Tick the box next to names on the People page list view to create a mass action, e.g., send a mass email, SMS, intake form, or handwritten card.

Labels

Easily organize your contacts and transactions by creating unlimited custom labels under Settings > Labels. Use them to quickly filter, sort, and build custom lists.

Advanced Filters

Targeting: Use advanced filters to build highly tailored lists for exports or mass actions, such as bulk email and SMS campaigns.

Categories: Filter your database using top-level categories like Rank, Client Type, and custom Labels.

Logic: Combine conditions using **AND**, **OR**, or **NOT**. For example, `Rank A OR "Active Seller" AND "$1M" NOT "Vancouver"` creates a specific list of Rank A clients or Active Sellers who also hold the $1M label, while strictly excluding anyone labeled Vancouver.

Interaction Notes

Sphere records contact activity in chronological order, including handwritten cards, referral calls, intake forms, email campaigns, and text messages, along with the available message details.

Emails

When you sync Sphere with Gmail or Outlook, all email correspondence with a contact is automatically logged chronologically in their profile.

Rank

There are lots of different ranking philosophies. Ross uses it to track the two things he cares most about - transactions and referrals. Here is his system:

A	2 transactions or 2 referrals, or one of each.
B	1 transaction or 1 referral.
C	Haven't done anything yet but really think they will when the opportunity arises.
D	Haven't done anything yet and not sure yet if they ever will. (Try to delete or graduate every 90 days).
X	People who you do not want to market to such as lenders, other brokers, inspectors, etc.

Rank A-D will show up on your to-do list for a referral/check-in call every 90 days (unless they were a part of a transaction in the last 90 days).

The referral call list is most useful when Rank A-D contains people you know and believe can help grow your business. Review the list regularly so it does not fill with contacts you would not call.

Connections

Link related contact profiles—such as spouses or partners—to easily sync shared details like home addresses, children, and pets.

To link profiles, click **Add Connection** at the top right of the contact page.

Find Duplicates

Click the **Find Duplicates** link at the top of the People page (next to the Import button) to identify contacts entered multiple times. You can review potential matches and either link them as **Connections** (like spouses) or merge them into a single contact.

Caution: Before using the *Merge All* button, carefully review the list. Separate individuals often share an email or phone number, and merging them will permanently erase one of the profiles.

Exporting Contacts

Click the **Export** button at the top right of the People page to download your entire database instantly, or export specific groups using the methods below:

Export by Filter

To export a specific segment (like all Rank A clients), apply your desired filters to the People page first. Once your tailored list is generated, click export.

Export by Selection

If you only need a handful of specific contacts, you can manually check the boxes next to their names in the list and click export to download just those profiles.

TRANSACTIONS

Designed to help you and your clients track every aspect of a transaction from the point when someone mentions they might want to buy or sell through archiving.

Create and Edit a Transaction

Create a transaction with the **+** button in the top menu or the **Add Transaction** button on the top right of the Transactions page.

To edit an existing transaction, click its address on the Transactions page.

Transaction Stages

All

Shows every transaction in the selected date range. The range defaults to year-to-date and can be changed with the date selector in the top right.

Potential

Use as a hot list or funnel for anyone considering buying or selling. Add an estimated price to understand the value of your pipeline.

Active

Active buyers/sellers

Listed

Live listings

Pending

In escrow

Closed

Archive closed transactions and their uploaded documents.

Got Away

Keep transactions that did not close. Sell Fell Through saves the failed transaction and creates a new copy with still-relevant data.

Changing Stages: Use the stage menu at the top of the transaction page to move a transaction, for example, from Potential to Active.

Labels

Create custom labels in Settings > Labels and apply them to transactions. Labels can track details such as lockbox numbers, and some stage labels are generated automatically.

Assignees

Add team members here if they are collaborating on this transaction. Assigning a team member ensures they stay in the loop and can actively manage the file.

What Assignees Can Do: They take ownership of specific tasks (like coordinating escrow), receive automatic notifications for upcoming deadlines and status changes, and collaborate by logging timeline updates, notes, and documents visible to the entire team.

Expenses

Log transaction-level expenses here to automatically categorize and include them in your financial reports.

Checklists

You can create as many unique transaction checklists as you'd like in Settings > Transactions, e.g., Buyer HOA. You can also add team members to checklist items by default, e.g., Chris is always assigned to the “Thank You Gift” checklist item.

Click on the three dots on a checklist item to open an edit menu that allows you to assign the checklist item to a team member or have an email sent to one/many parties involved when an item is completed.

You can also set a calendar due date for any item or a relative due date for each checklist item, e.g., 2 days before the "Disclosure Deadline”.

Custom Fields

Create, edit, or customize your transaction fields by navigating to Settings > Transaction > Contract Details.

Parties Involved

Easily keep track of everyone tied to the transaction and send them automated updates through the Transaction Timeline.

Transaction Timeline

Sphere's Transaction Timeline provides a personalized, client-facing portal for each transaction. It keeps your clients informed about completed milestones and upcoming steps—drastically improving communication and reducing routine "status update" calls.

Create a Timeline

It's easy to get started! Simply click the **Timeline** link located just below the property address at the top of any transaction page to generate and share a personalized portal with your clients.

Visibility & Updates

You maintain full control over whose contact information appears on the timeline and exactly who receives automated progress updates for each transaction.

Customizing Stages

Tailor the exact explanations shown to your clients for each timeline stage by navigating to Settings > Transaction > Contract Details.

Transaction Timeline Comments & Links

Timeline Links: Add useful external resources for clients and other parties to the transaction timeline.

Timeline Comments: Let authorized clients and other transaction participants post questions or updates directly on the timeline. Comments remain visible with the conversation, and the transaction owner can receive notifications based on their notification settings.

Demand Draft

Automatically generate a custom Demand Draft using the data already entered in your transaction. You can easily customize exactly which fields to include for each individual draft.

> **Where to find it:** Click the link located just below the property address at the top of the transaction page.

Send to Escrow

Instantly draft an email to open escrow. This feature automatically populates the escrow officer's email address and attaches your generated Demand Draft.

> **Where to find it:** Click the link located just below the property address at the top of the transaction page, right next to the Timeline and Demand Draft links.

SkySlope

If you use SkySlope, you can use this button to instantly create a transaction in SkySlope and update its information directly from Sphere as needed.

> **Prerequisite:** Before using this feature, you must first configure your SkySlope integration under Settings > Transaction > Skyslope.
>
> **Billing Note:** By enabling this feature, you will be charged an additional $10 / month.

Document Archive

A spot for archiving documents related to the transaction for your records. It also allows you to share one or many with parties involved through the transaction timeline.

CALENDAR

Once you sync your Outlook or Google Calendar with Sphere, you can see your calendar and team members' calendars on the Calendar page.

You can decide which Sphere dates (transaction dates, birthdays, housiversaries, etc.) are synced with your calendars in Settings > Calendar.

REPORTS

The reports currently available are:

- Referrals
- Referral Calls
- PopBys
- Out of Touch
- Birthday
- Anniversary
- Housiversary
- Lead Source
- Expense
- Monthly Summary Report
- Full Summary Report
- Annual Report

You can set date ranges, search your results, and list them in order by referral source, total referrals, gross sales volume, and gross commission.

You can also send handwritten cards from some reports, including Birthday and Housiversary.

MARKETING

Our goal with Sphere has been to create marketing functionality that we'd be excited for our friends and family to receive: useful information such as Equity updates and thoughtful touches such as handwritten birthday cards with gift cards.

Handwritten Cards

- Choose from hundreds of cards and handwriting styles. Messages, recipient addresses, and return addresses are written with a ballpoint pen, and a gift card can be included.
- Cards cost $4 including postage.
- Configure automatic cards in Marketing > Cards > Card Template.
- Send cards individually or select recipients from People, Today birthday/housiversary lists, or Reports.

Equity

- Equity provides a monthly market-value and home-equity update for a client's home.
- Add one or multiple clients from Marketing > Equity or through the People mass-action menu. Clients receive an introduction and can opt in to monthly reports.
- Customize the initial estimate and the email templates under Marketing > Equity > Equity Email > Template.
- View subscribers and open rates in Marketing > Equity > Subscription. Data comes from several sources, including FRED and Zillow, and is not available for every address.

Popby

Upload a CSV list of popbys so they can be added to each client's Interaction Notes.

Groups

Create marketing groups for mass email or SMS campaigns.

Templates

The template library includes templates you created previously and available stock templates. You can start a mass email from Templates or Email Blast.

Email Blast & Deliverability

Start with a previous template or create a new email from scratch, then add and edit its content.

Click Continue to add individual recipients or a group, create an internal campaign name, and set the subject, sender name, and sender email address.

If you are not sending the campaign immediately, use the Save button at the top.

SPF Record Update Required

What if my emails sent from Sphere are going to Junk/bouncing?

Google, Yahoo and other providers have tightened their requirements for delivering bulk email in order to curtail spam. One of the things they now require is that the sender's email domain authorizes the server sending the email on its behalf.

This is done with an SPF record in your domain's DNS. If your SPF record doesn't reference the sending server (in our case usesphere.com), your emails may be marked as spam or even rejected.

The good news is this is an easy change to make. It only takes a minute and only needs to be done once. The steps depend on who you are using as your DNS host, but they are usually as simple as:

1. Login to your DNS host site.
2. Click on **Manage Domain** for your domain.
3. Click on **Advanced DNS**.
4. Look for an existing TXT record with Host `"@"` whose value starts with `v=spf1`.
5. If you **already have** an SPF record (very common if you use Outlook/Microsoft 365, Google Workspace or other email services), edit that record and add `include:spf.usesphere.com` right after `v=spf1`, keeping everything else as

it is. For example, `v=spf1 include:spf.protection.outlook.com -all` becomes `v=spf1 include:spf.usesphere.com include:spf.protection.outlook.com -all`.

6. If you **do not have** an SPF record yet, click on **Add New Record**, select record type **TXT**, type `"@"` under Host and under Value type `v=spf1 include:spf.usesphere.com -all`.

Important: A domain must have only ONE SPF record. Never create a second TXT record starting with `v=spf1`. Having two SPF records makes SPF fail for all your email, including the emails you send from your regular mailbox.

Note: If your domain uses several email services, your SPF record may exceed the limit of 10 DNS lookups, which also makes SPF fail. If you are unsure, you can check your domain with a free SPF checker such as MXToolbox SPF Check.

SMS Blast

The landing page under Marketing > SMS Blast is an inbox that organizes SMS conversations by client.

Create an SMS blast with the compose icon and select recipients or a group, use the Send SMS page and select clients, or select people on the People page and use the Send SMS mass action.

Messages sent or received are associated with the relevant client conversation.

Drip Campaign

Create customizable automated workflows for selected groups or filtered audiences. A workflow can trigger from a calendar date, birthday, housiversary, workiversary, transaction field, or custom label. You can arrange Email, SMS, To-Do, and Time Delay actions in any sequence, and easily customize the content and timing of each step.

> **Example:** A welcome workflow could automatically send an email the moment a contact receives a specific label, wait two days, and then send an SMS asking if there is anything you can help them with.

Additional Marketing Resources

LoLo: LoLo works with local businesses to provide monthly client gifts. Learn more at lolo.gifts.

TEAM

Sphere's team functionality is customizable and modular. The setup is similar to a social network: you can invite anyone to your team, decide which data you share with them, and let them decide which data they share with you.

Adding someone to your team does not automatically connect that person to anyone else on the team.

The Team Dashboard provides high-level metrics for everyone on your team.

Team Settings

Add Members: Go to Team Settings (top right). Add via email or create a new account.

Permissions: Configure access privileges per user.

Billing: Manage team member subscriptions using the "Manage Subscription" link.

REFERRAL REWARDS

We put every dime of revenue back into building out and improving the Sphere. So, referrals are huge for us.

we've tried to make them huge for you too. For every person you refer who subscribes, we'll give them a reward and you a reward. A Win/Win/Win.



Referral URL

Send them your custom link to sign up.



Referral Code

They enter your code (e.g., your first name) at signup.



Direct Invite

Type their name/email on the Rewards page.

SETTINGS

We've tried to make Sphere as customizable as possible.

Account

The Account Settings submenu includes Account Information, Change Password, Signature, Subscription, Coupons, Payments, and Billing.

Use it to manage profile settings such as your profile picture, email signatures, personalized Equity and Intake URLs, account type, billing, and subscription information.

Email

Add or remove Outlook and Gmail addresses that you want to sync with your Sphere account.

Calendar

Add or remove an Outlook or Google calendar and choose which Sphere dates sync to it, including client birthdays, housiversaries, and transaction dates.

Connect

Connect works like a lightweight Calendly. Configure your available days and appointment lengths, then share a personalized URL so clients can select an available time.

To Do

Control what appears on your to-do list, including whether referral calls are created automatically for Rank A-D clients you have not contacted or completed a transaction with in the last 90 days.

Labels

Add, edit, or delete labels. Some labels cannot be deleted because they are used by automated Sphere processes.

People Settings

- **Custom Fields:** Add additional fields to People profiles.
- **Intake Form:** Configure the fields used by the client intake form.
- **Connections:** Choose which fields sync between connected spouse or partner profiles.
- **People Type:** Add to or edit the Type list used on People profiles.
- **Lead Tracking:** Add to or edit the Lead Tracking menu.

Transaction Settings

- **Checklists:** Create and edit transaction checklists, default assignees, and relative due dates.
- **Contract Details:** Choose transaction fields, field types, timeline visibility, explanations, and email updates.
- **Lead Tracking:** Add or remove Transaction Lead Tracking options.
- **Reviews:** Edit the review-request email and configure external review sites.
- **Timeline:** Edit timeline email templates in Settings > Transaction > Contract Details.
- **Skyslope:** Add account details to sync Sphere with Skyslope.

Notifications

Choose which notification types you receive for events such as open-house requests, Equity responses, and Intake updates.

Call & SMS

Select a phone number for calls and mass SMS. Sent and received messages are added to the client's Interaction Notes and appear in the SMS inbox.

Trash

Deleted client profiles and transactions go to Trash so they are not permanently removed accidentally.

API DOCUMENTATION

Looking to integrate with Sphere or have questions about our APIs? Our API Documentation includes authentication details, endpoint references, request/response examples.

View Sphere API Documentation