



Leads and Contacts



Leads and Contacts

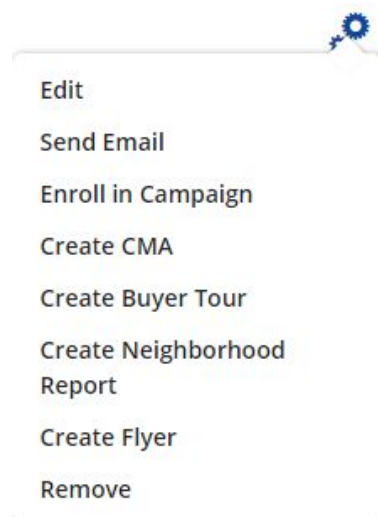
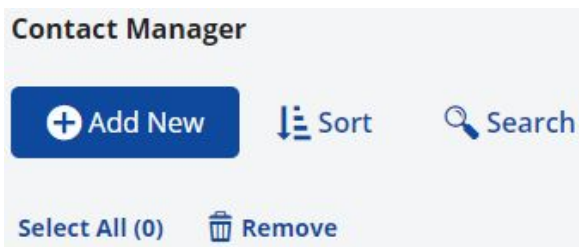


Power Suite keeps track of all of your contacts, including current and past clients.

Editing, Adding, and Deleting Contacts

To edit, send email, launch campaign, or delete a contact record, click on the gear icon in the top right corner of the contact to get the drop down menu.

To **add a new contact** record, click on the Add New button.



Within the contacts application you have the ability to Edit Details for the contact, select contact categories, create a **Buyer Profile**, start a **CMA** or **Buyer Tour**, as well as enroll them in campaigns and make notes for that contact.

Leads and Contacts

You can get as detailed as you need within your Contacts list.

Edit Contact [← Back to Contact Manager](#)

T Test Email **ACTIVE**

✉ testlead@test.com Recent Activity: Lead Gator New Lead
07/11/2017

☎ (604) 123-4567

[Create CMA](#)

[Create Buyer Tour](#)

[Create Neighborhood Report](#)

[Create Property Flyers](#)

Activity Timeline ▼

Manage Contact Info ▼

Buyer Profile ▼

Campaigns ▼

Notes ▼

Entered On: 07/11/2017 02:17 PM Entered By:
Modified On: 07/11/2017 02:17 PM Modified By:

Activity Timeline will show the contact's recent activity. Activity types will include property inquiries and contact requests from your Sellstate website and Homes.com, Home Tracker Sign-ups, and Lead Gator Messages.

Activity Timeline

1 Results

 July 16

Property Inquiry

6057 MAGGIES CIR 113, Jacksonville, FL 32244 | \$79,900 | MLS# 890838 | I'd like more information about the listing that I found at Homes.com at 6057 Maggies Cir 113.

Leads and Contacts

Manage Contact Info will show the contact information such as name, phone number, email address, and lead source. Choosing a **Contact Category** will allow you to group your contacts into categories which will make it easy to send out email blasts in the Email Marketing application to a group of contacts, or to quickly export a group of contacts for third-party use.

Manage Contact Info

First Name Tim	Last Name Brown	Email timbrown@gmail.com	
Phone (Mobile)	Phone (Home)	Phone (Work)	Ext.
Fax	Title	Company	
Lead Source Agent Site	Website		
Street Address	City	State	
Zip	County	Country	

Choose contact category

(Select all that apply)

- | | | | |
|--|---|---|--|
| <input type="checkbox"/> Attorney | <input type="checkbox"/> Broker/Realtor | <input checked="" type="checkbox"/> Buyer | <input type="checkbox"/> Buyer/Seller |
| <input type="checkbox"/> Closing Agent | <input type="checkbox"/> Employee | <input type="checkbox"/> Home Inspector | <input type="checkbox"/> Internal User |
| <input type="checkbox"/> Landlord | <input type="checkbox"/> Lender | <input type="checkbox"/> Other | <input type="checkbox"/> Seller |
| <input type="checkbox"/> Tenant | <input type="checkbox"/> Title Agent | <input type="checkbox"/> Unknown | |

Leads and Contacts

Properties will keep a list of all of the contact's property inquiries, or saved properties through the My Home Tracker.

Properties

1 Results

📍 6057 MAGGIES CIR 113 Jacksonville, FL 32244

\$79,900

2 Bd | 2 Br | 907.00 sqft

MLS# 890838

Requested More Info: 07/16/2017

You can even enroll your clients into **Email Drip Campaigns**:

Campaigns

0	0	0	0
Active	Completed	Cancelled	Sent
1st Time Buyer - Single Enrolled?	1st Time Buyer - Team Enrolled?	1st Time Buyer - Single Enrolled?	1st Time Buyer - Team Enrolled?
1st Time Renter - Team Enrolled?	Buyer Anniversary Plan - Single Enrolled?	Buyer Anniversary Plan - Team Enrolled?	Buyer Anniversary Plan - Single Enrolled?
Buyer Follow Up - Single Enrolled?	Buyer Follow Up - Team Enrolled?	Buyer Investor - Single Enrolled?	Buyer Investor - Team Enrolled?

Leads and Contacts

Or use **Buyer Profile** to create automated email listing alerts to match homes with an interested buyer.

Buyer Profile

Match buyers with listings by adding a Buyer Profile. Your Contact will be automatically alerted by email when new listings match their preferences.

Get started by adding a new Buyer Profile!

[Add New Buyer Profile](#)

Buyer Profile searches can be customized for any search criteria.

[← Back to Buyer Profiles](#)

Add Buyer Profile

Search Contact
Tasia Bryant

Profile Name*
Search created on: Thursday, July 20, 2017

Area, ZIP or Address

Property Type: Any | Listing Type: Any | Listing Status: Any

Price: Any | Beds: Any | Baths: Any | Square Feet: Any

Lot Acreage: Any | Year Built: Any | Garages: Any

Subdivision: | MLS#:

Match All These Keywords
(EX: Pool, Deck, Patio)

Match Any Of These Keywords
(EX: Pool, Deck, Patio)

Send email updates
 No Emails Daily Weekly Monthly Quarterly

Moving Plans?
 No Moving Plans Immediately < 3 Months 3 + Months 6 + Months

Working with an agent?
 YES

Financing arranged?
 YES

[Cancel](#) [Save & Close](#) [Save](#)

