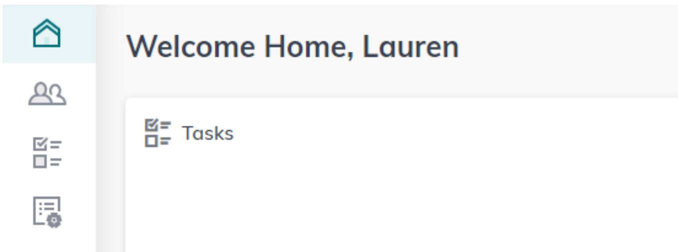
CONTACTS

Once logged in, click on CONTACTS in the upper left corner of the dashnoard



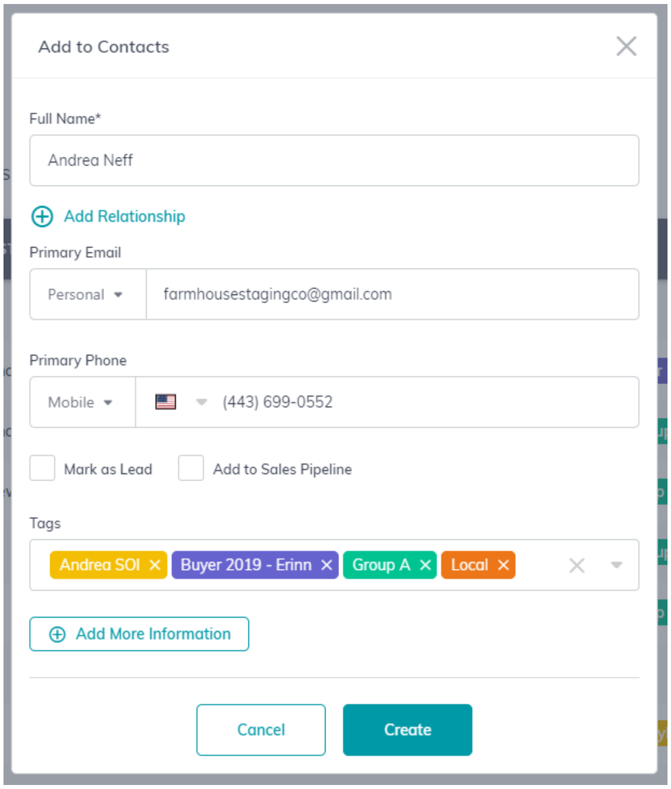
Click on the ADD CONTACT button on the upper left corner

Add the clients info

- First name
- Primary Email
- Mobile phone

You do NOT need to click on “Mark as lead” or “Add to Sales Pipeline”

Under Tags
Choose the category(s) that will help us identify the client
Group A+/A/B/C, Agent SOI, Buyer/Seller – 2019 – Agent, LOCAL/OUT OF AREA, etc



Click on ADD MORE INFORMATION

Choose the drop down for **Additional Contact Info**

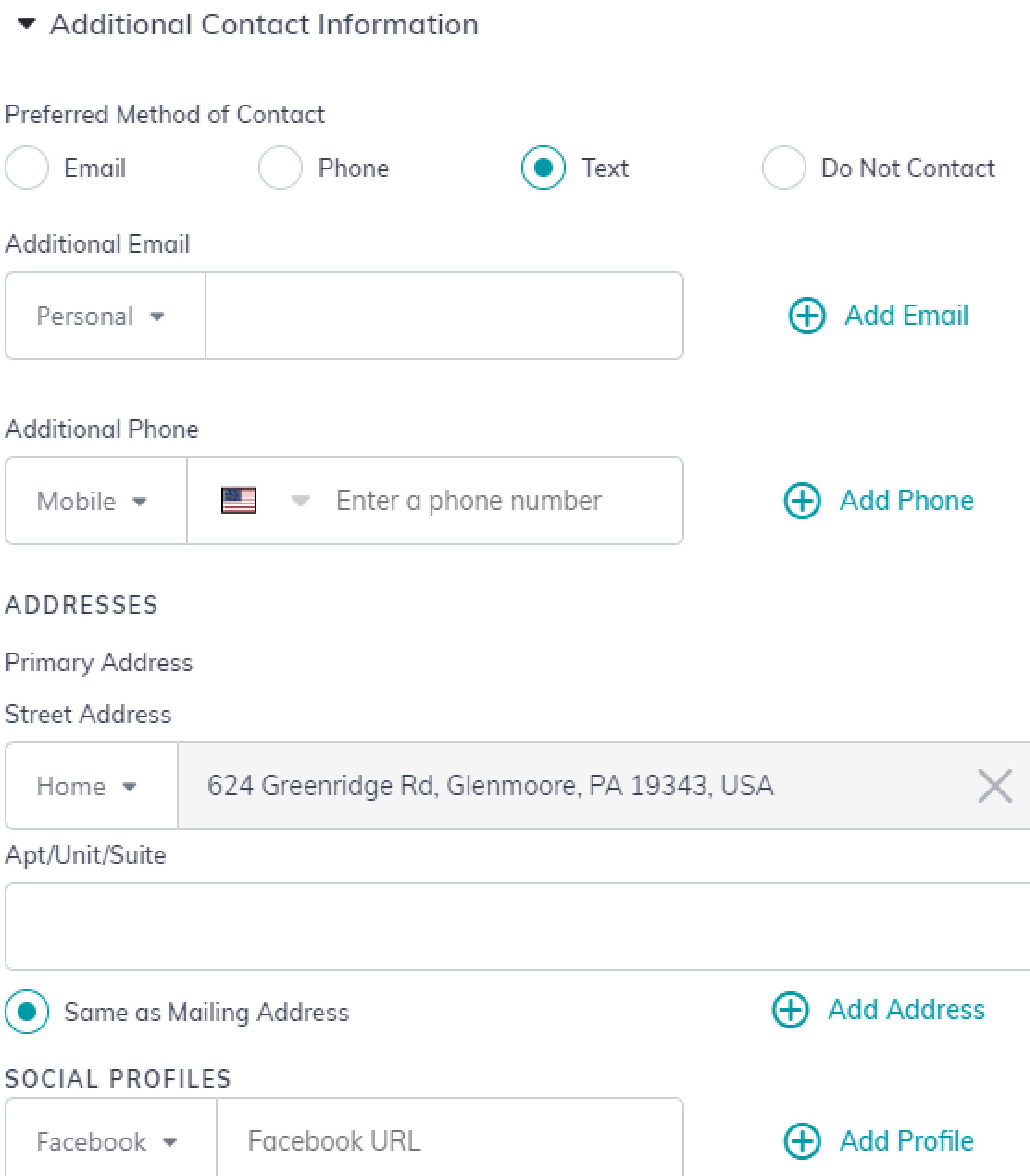
Here you can add more contact info

If you know their preferred method of contact

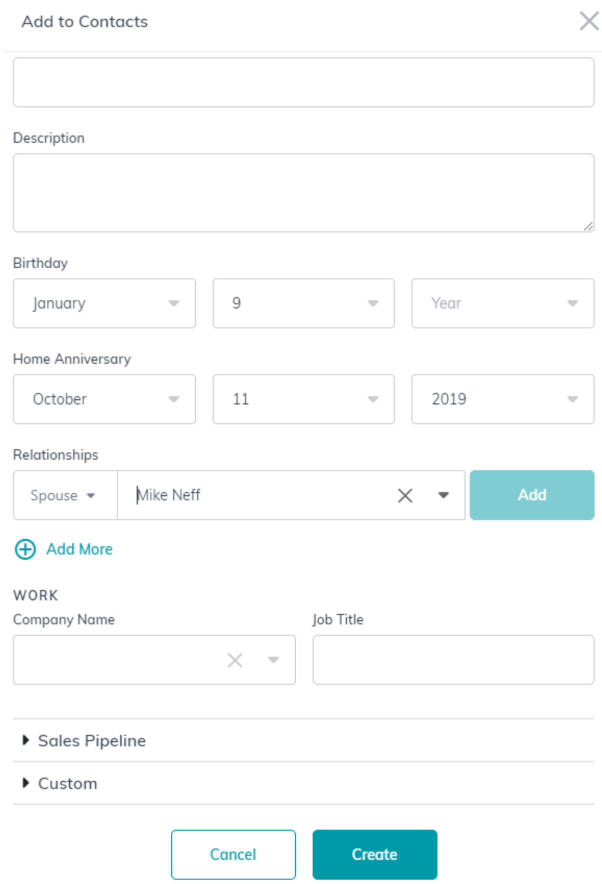
Additional emails or hone numbers

Current addresses (put the name of the property they are buying or selling if adding in as an opportunity)

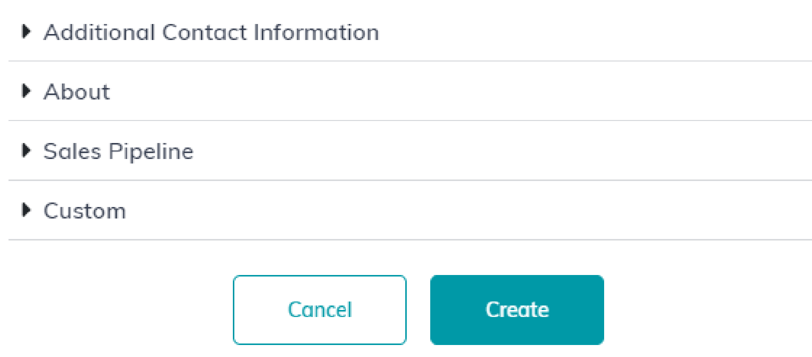
You do not need to add social profiles at this time!



Choose the ABOUT Drop Down
If their legal name is different add it here! (Mike vs Michael, Dick Vs Richard, etc)
Do not need to add a description.
Add a Birthday if you have it from Domestic Relations
What is their Home Buying Anniversay
Relationships – Typically Spouse or Partner. YOU WILL NEED TO EDIT THE RELATIONSHIP CONTATC INFO SPERATELY!!!
If you have work contact info you can add ti here.



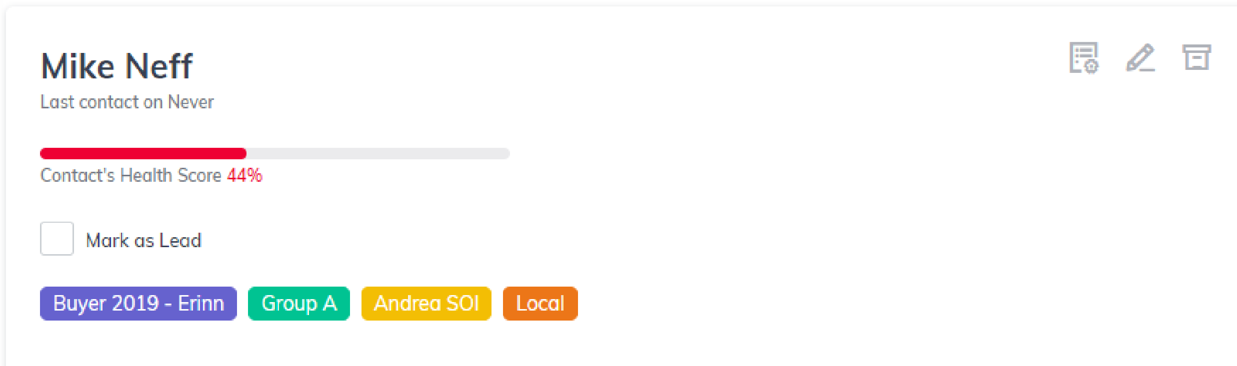
At this time we are not tracking our lead sources in Command.
You do NOT need to add anything to the Sales Pipeline or Custom Fields at this time.
Click on Create.



Once the contact is created, you can go find the spouse/parter/relationship contact record and add in their contact info.

Search the contact in the search field
Click on the contact.

When the contact record opens, click on the edit button in the right upper area of contact record box



Complete the contact record in the same way as you did the spouse.

NOTES:

Contact Tags are similar to our categories. These ones are a must!

Group A+/A/B/C
Buyer 2019 – Agent
Seller 2019 – Agent
Agent SOI
Local/Out of Area

If they are an agent, please note that!