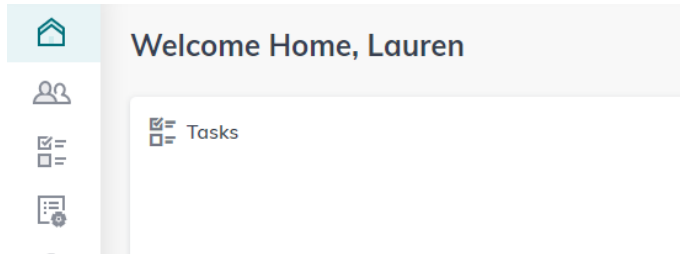


CONTACTS

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



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

The screenshot shows a 'Add to Contacts' form with the following fields and options:

- Full Name***: Andrea Neff
- Primary Email**: Personal (dropdown), farmhousestagingco@gmail.com
- Primary Phone**: Mobile (dropdown), USA (country dropdown), (443) 699-0552
- Mark as Lead
- Add to Sales Pipeline
- Tags**: Andrea SOI (yellow), Buyer 2019 - Erinn (purple), Group A (green), Local (orange)
- Buttons**: Add More Information (circled in red), Cancel, Create

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 phone 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!

▼ Additional Contact Information

Preferred Method of Contact


Email Phone Text Do Not Contact

Additional Email

Personal ▼

+ Add Email

Additional Phone

Mobile ▼  ▼ Enter a phone number

+ Add Phone

ADDRESSES

Primary Address

Street Address

Home ▼ 624 Greenridge Rd, Glenmoore, PA 19343, USA ✕

Apt/Unit/Suite

Same as Mailing Address

+ Add Address

SOCIAL PROFILES

Facebook ▼ Facebook URL

+ Add Profile

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 Anniversary

Relationships – Typically Spouse or Partner. YOU WILL NEED TO EDIT THE RELATIONSHIP CONTACT INFO SPERATELY!!!

If you have work contact info you can add ti here.

Add to Contacts
✕

Description

Birthday

January ▾

9 ▾

Year ▾

Home Anniversary

October ▾

11 ▾

2019 ▾

Relationships

Spouse ▾

Mike Neff

✕ ▾

Add

+ Add More

WORK

Company Name

Job Title

▸ Sales Pipeline

▸ Custom

Cancel

Create

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.

▸ Additional Contact Information

▸ About

▸ Sales Pipeline

▸ Custom

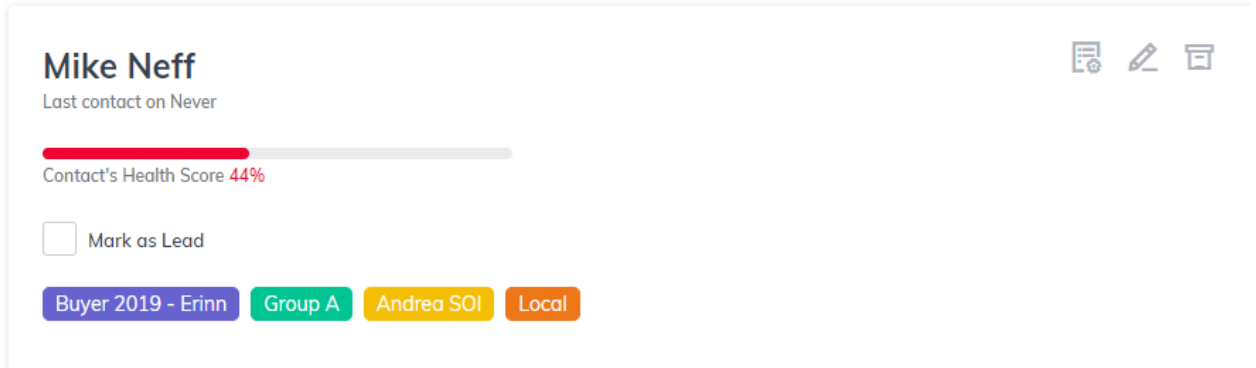
Cancel

Create

Once the contact is created, you can go find the spouse/partner/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!