

How to Add Contact Information to a Prospect Profile

Description

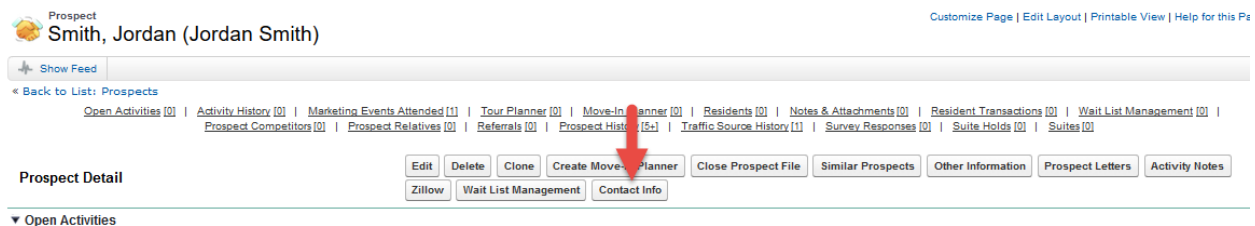
Use this function to view or edit contact information on an existing prospect page

The system will:

- Record contact information on the Contact Information button as well as the main prospect profile page

Step by Step

- Navigate to the prospect for whom you would like to view, add, or edit contact information
- Click **Contact Info**



Prospect **Smith, Jordan (Jordan Smith)** Customize Page | Edit Layout | Printable View | Help for this Page

Show Feed

Back to List: Prospects

Open Activities [0] | Activity History [0] | Marketing Events Attended [1] | Tour Planner [0] | Move-In Planner [0] | Residents [0] | Notes & Attachments [0] | Resident Transactions [0] | Wait List Management [0] | Prospect Competitors [0] | Prospect Relatives [0] | Referrals [0] | Prospect History [5:1] | Traffic Source History [1] | Survey Responses [0] | Suite Holds [0] | Suites [0]

Prospect Detail Edit Delete Clone Create Move-In Planner Close Prospect File Similar Prospects Other Information Prospect Letters Activity Notes

▼ Open Activities Zillow Wait List Management Contact Info

- Check off the applicable **Communication Preferences** checkboxes: *Do Not Contact*, *Include in Email*, *Include in Mail*
- Enter one or more **Inquirer Phone** numbers and phone sources
- Enter an **Inquirer Email**
- Use the **Address Search** bar to search for the inquirer's address. Select the correct address to populate the address fields below.
NOTE: If you are not able to find the address in the address search bar, manually enter the address fields
- If the inquirer and prospect are the same person, check off **Copy Inquirer Info to Prospect on Save** and skip to step 12. Otherwise, leave this checkbox unchecked and continue to step 8.
- Enter one or more **Prospect Phone** numbers and phone sources
- Enter a **Prospect Email**
- Enter a **Spouse Email**
- Use the **Address Search** bar to search for the inquirer's address. Select the correct address to populate the address fields below.

NOTE: If you are not able to find the address in the address search bar, manually enter the address fields

12 The **Inquirer Addressee** and **Prospect Addressee** fields are formula fields that fill in based on existing inquirer, prospect, and spouse information. To enter a name that is different from the default, type into the Addressee fields and click the **Override** checkbox.

13 Select **Preferred Method of Contact**

14 Select **Mailing Label Instructions**

15 Click **Save**

16 Click **Close** to return to the main prospect profile page