

CONTACT DATABASE

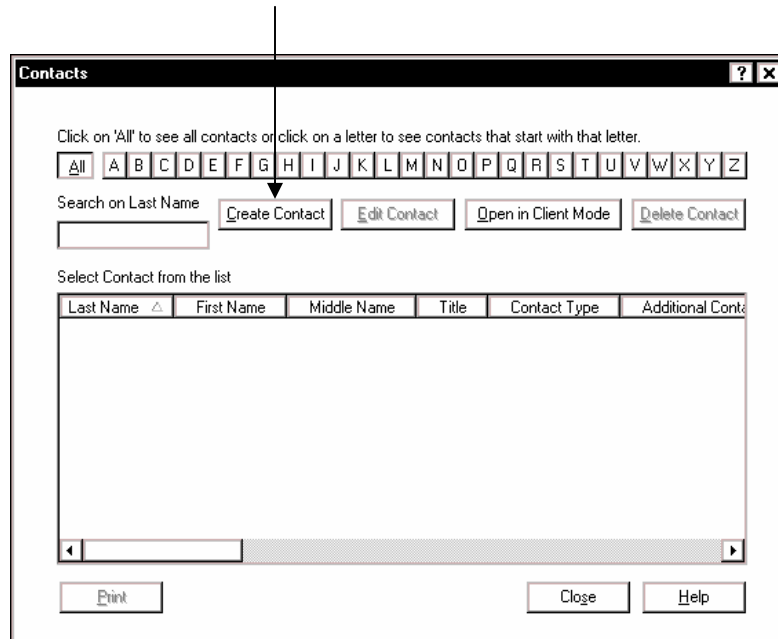
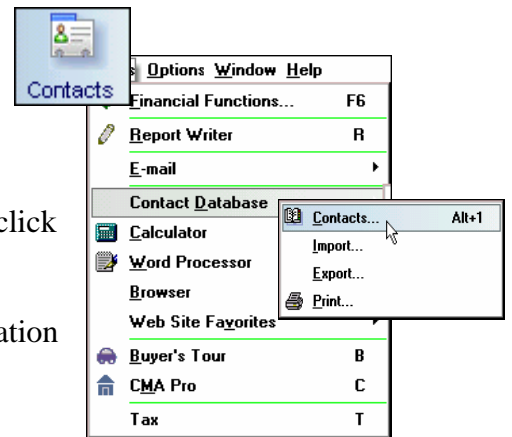
The Contact Database resembles and functions like an address book. You can store client information and manage client files. Clients can be added, modified and deleted. Five types of files can be associated with a client:

- ❖ Search Criteria
- ❖ Search Results
- ❖ Financial Analysis
- ❖ CMA's
- ❖ Buyer's Tour

Adding a New Contact

To add a new contact to your database and utilize all of the it's features, follow the steps below:

1. Click **Contacts** on your Features and Functions Toolbar or click on **Tools > Contact Database > Contacts**.
2. Click the **Create Contact** button. The New Contact Information Wizard opens.



3. The New Contact Information screen opens at the Name tab. Enter your contact name and information and then click the Additional Information tab.

New Contact Information [?] [X]

Name | Additional Information | Associated Files | Client Updates

Contact Name

* First Name: Title: [v]

Middle Name:

* Last Name:

* Contact Type: [v]

Additional Contact:

Contact Information

Street Address: Telephone:

Street Address2: Fax:

City: Cellular:

State: Primary E-mail:

Zip: Other E-mail:

Country:

Web Address:

* = required fields

OK Cancel Help

4. Enter your business information and important notes if desired and then click the Client Updates tab.

Edit Contact Information for Heather Jones [?] [X]

Name | Additional Information | Associated Files | Client Updates

Business Information

Company Name: Business E-mail:

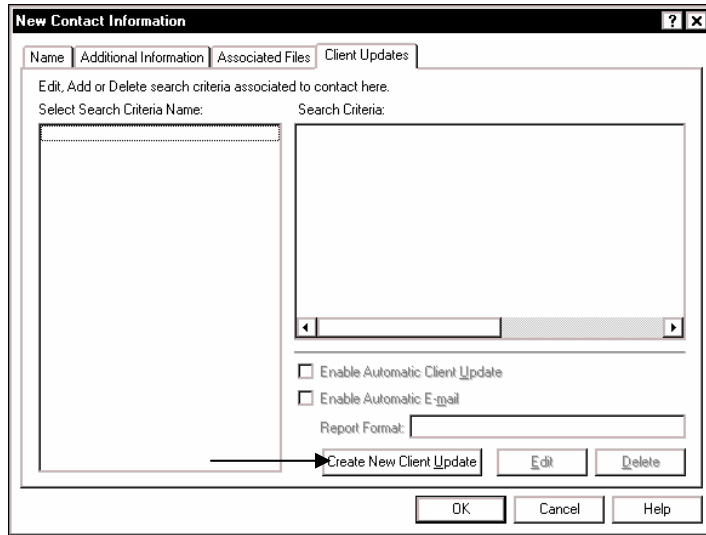
Telephone: Pager:

Fax:

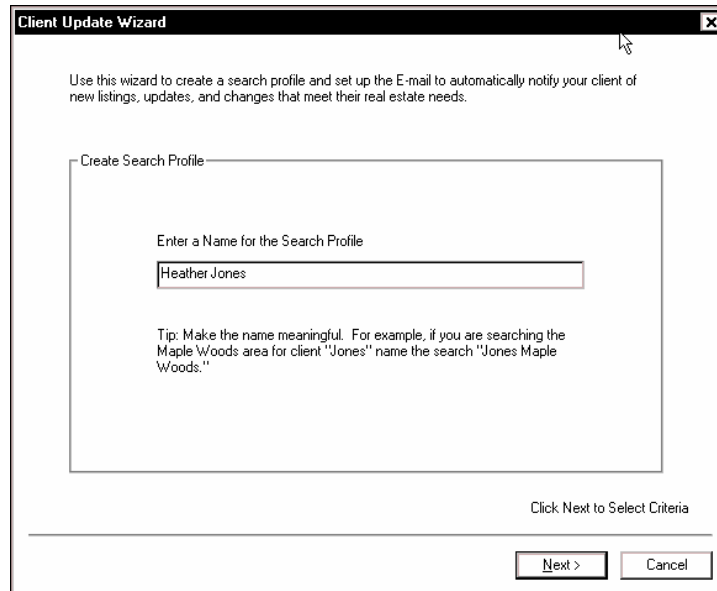
Notes

OK Cancel Help

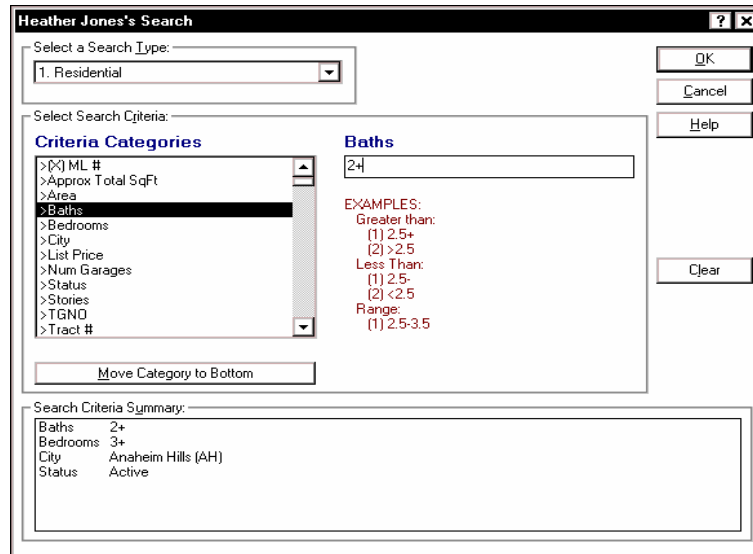
- Once in the Client Updates tab, click the **Create New Client Update** button. This will open the Client Update Wizard.



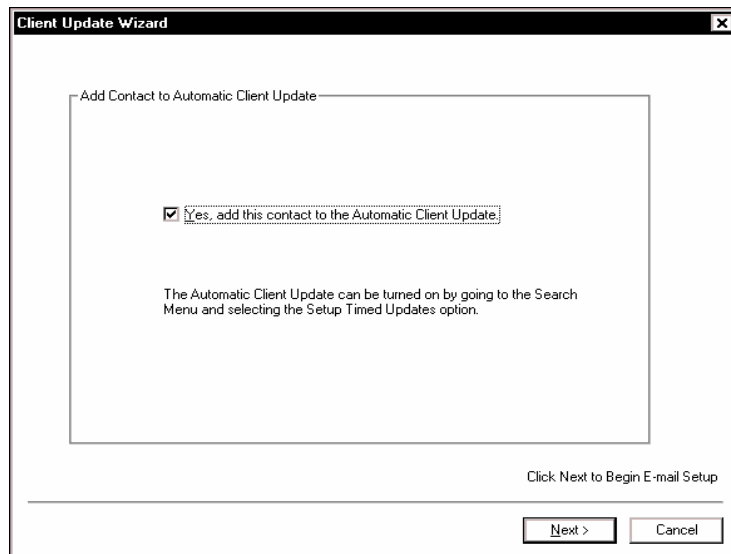
- Enter a name for the Search Profile and click Next. *If you decide to cancel at this point, then see Adding Search Criteria for a Contact at a Later Time found later in this Tutorial.*



- Enter the search criteria that you will associate with the client and click OK. Notice the Title Bar has the name you saved as the client profile.



- The program automatically selects the option to add the contact to the Automatic Client Update. If you keep this selected, then the program will automatically e-mail the results of the Automatic Client Update to your client. The e-mail will include new listings, listings with price changes and listings with status changes (see Tutorial 16 – Automatic Client Update). Uncheck the box if you do not want to include this client in your Automatic Client Update list. The program will bypass the E-mail setup and take you to the Client Mode. Click Next to continue.



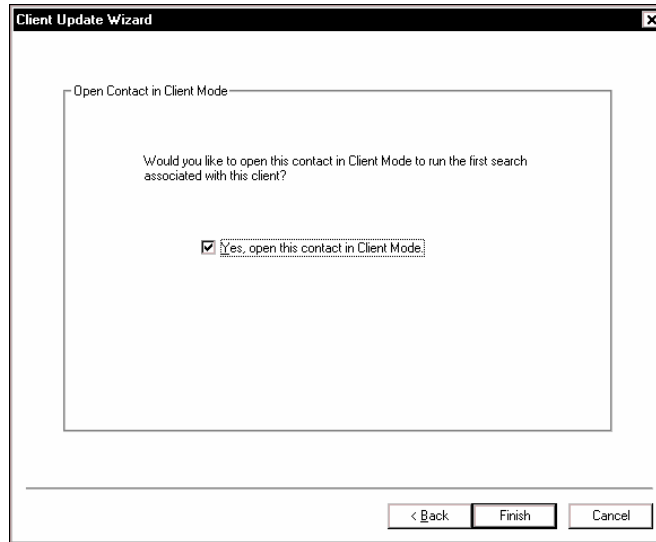
9. Your client’s e-mail address (if entered in the name/contact information tab) will populate in the To section. You can change or add additional e-mail addresses. Your e-mail address, your name, website address, and signature will auto populate if you entered this information in **Options > Preferences** (see Primary Agent and Brokerage found in Tutorial 2). Enter a subject and message. You can also request a copy of the e-mail by checking the option at the bottom of the window. Click Next to Continue.

The screenshot shows the 'Client Update Wizard' window. At the top, there is a checkbox labeled 'Yes, send Automatic E-mail notifications to this Client' which is checked. Below this, a note says 'Separate Multiple Addresses using semi-colons'. The 'To...' field contains 'heathejones@yahoo.com'. The 'Cc...' field is empty. The '*Your E-mail Address:' dropdown is set to 'diane_harbeson@sbcglobal.net'. The 'Your Name:' field contains 'Diane Harbeson'. The 'Website Address:' field is empty. The 'Subject:' field contains 'Properties to View'. The 'Message:' text area contains 'Check out these new listings.'. The 'Signature:' field is empty. At the bottom, there is a checkbox labeled 'Also, send me a copy of this E-mail' which is checked, with a '* Required' label to its right. At the very bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

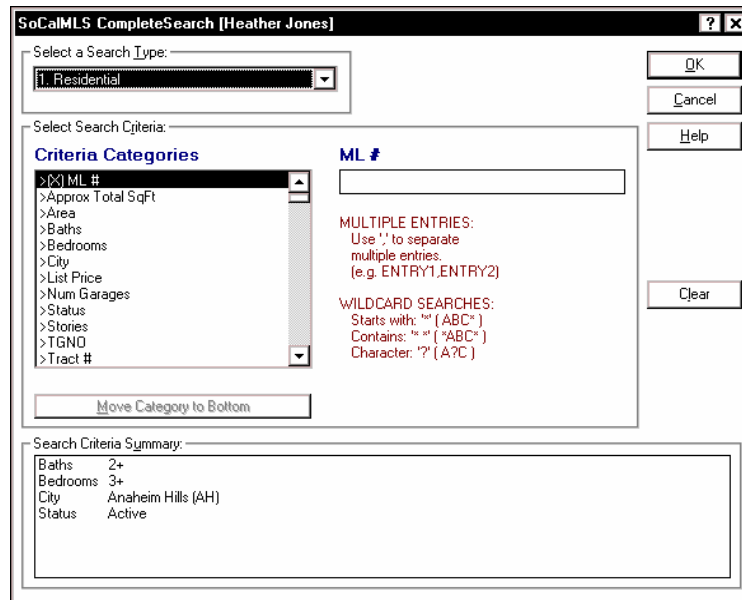
10. Select a report format for the e-mail by highlighting the report name. If you are sending the update to your client, be sure to select a client only format. You will see an example of the report formats in the Report Preview area to the right of the list. Click Next to continue.

The screenshot shows the 'Client Update Wizard' window at the report selection step. On the left, under 'Choose a Report:', there is a list box with the following items: '*Brief*', '*Customer Brief*', '*Customer' (which is highlighted), '*Full*', '*No Photo Brief*', and '*No Photo Full*'. On the right, under 'Report Preview:', there is a preview window showing a sample of the report format, which appears to be a list of property details. Below the preview, there is a tip: 'Tip: This is the format in which the search results will be sent to your client. Choose the report which best showcases how you would like to present the results.' At the bottom, there are three buttons: '< Back', 'Next >', and 'Cancel'.

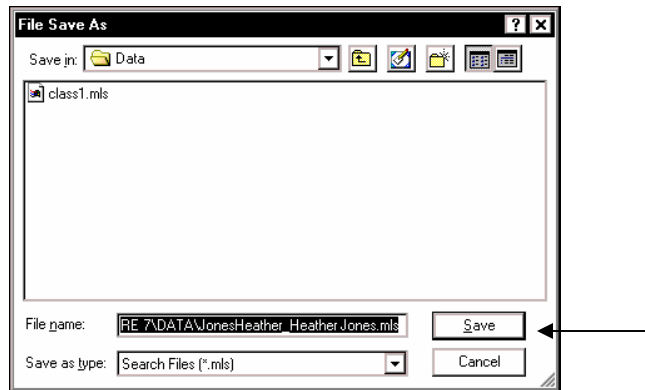
11. The program automatically selects the option to open this contact file so that your search criteria will automatically populate and the saved search results will be associated to this contact. Click Finish.



12. The Search window opens with your search name in the Title Bar along with the criteria that you already added for your client. Click OK to get your matching listings.



13. Feel free to edit your Property Listing Table (see Tutorial 8 – The Property Listing Table). This becomes your initial list of properties for your client. You can print this list for your client or you can e-mail them the list (see Tutorial 13 – E-mailing Reports, the Property Listing Table and Financials). **From this point forward, the automatic client update function will e-mail any changes from the initial list including new listings, listings with price changes and listings with status changes.**
14. Save the results by clicking on **File > Save As**. The program will automatically name your file for you. Click the **Save** button.

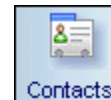


15. Close out of your client's results by clicking the lower X at the top right hand corner on your screen or by clicking **File > Close**.
16. Your client's name is still in the Title Bar so you must close out of your client mode by clicking **File > Close Contact**.

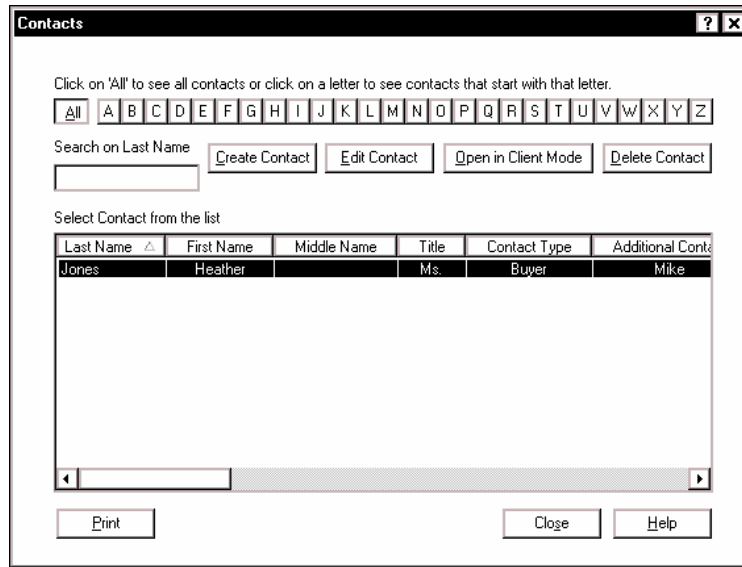
Editing a Contact (General Information)

To edit general information such as name, residence, business and/or notes for an existing contact follow the steps below:

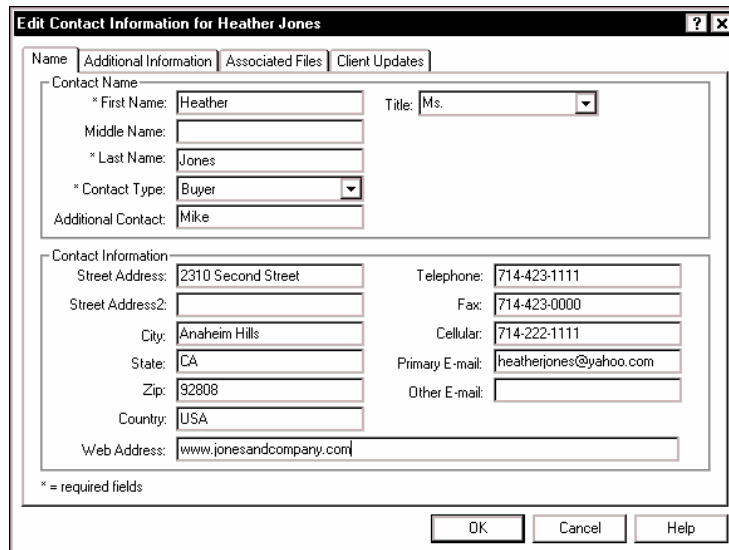
1. Click **Contacts** from the Features and Functions Toolbar or click on **Tools > Contact Database > Contacts**.



- Highlight the name of the contact to edit and click on the **Edit Contact** button.



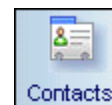
- Click the Name and/or Additional Information tab to add and/or change information. Make your changes and click OK.



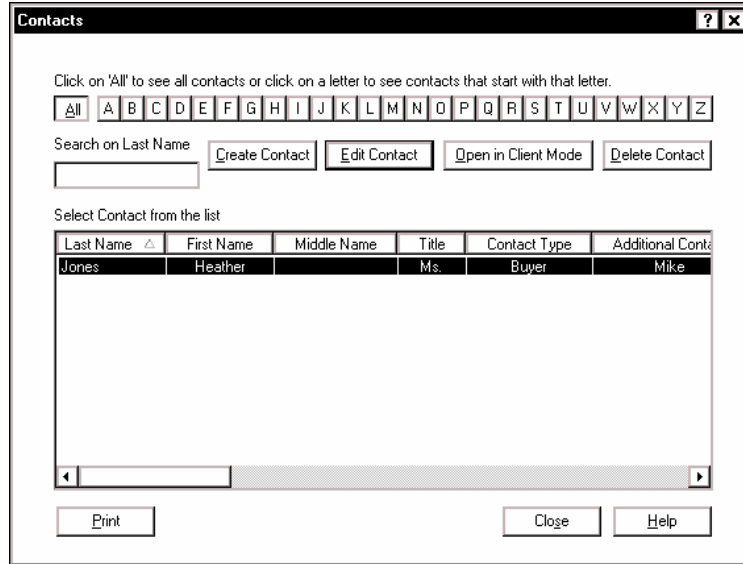
Editing Search Criteria and/or E-mail Options

To edit the search criteria and/or e-mail options for an existing contact follow the steps below:

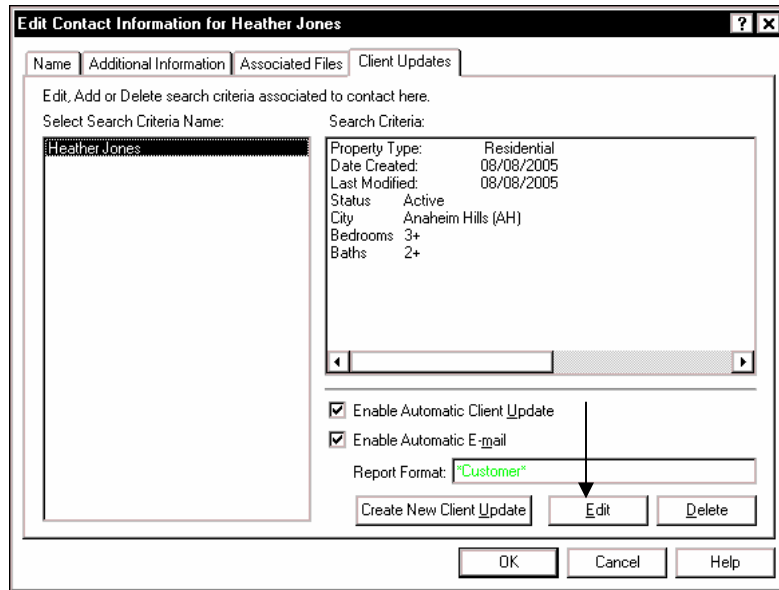
- Click **Contacts** from the Features and Functions Toolbar or click on **Tools > Contact Database > Contacts**.



- Highlight the name of the contact to edit and click on the **Edit Contact** button.



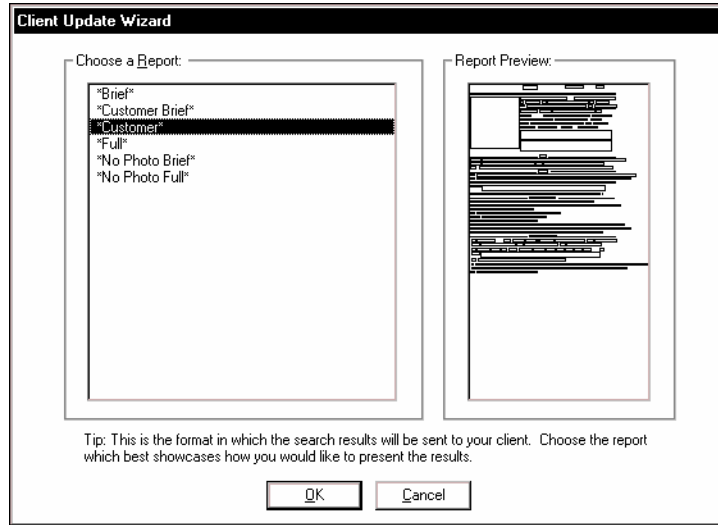
- Click the Client Updates tab. You will see the search criterion that was added when using the Client Update Wizard. Click the **Edit** button.



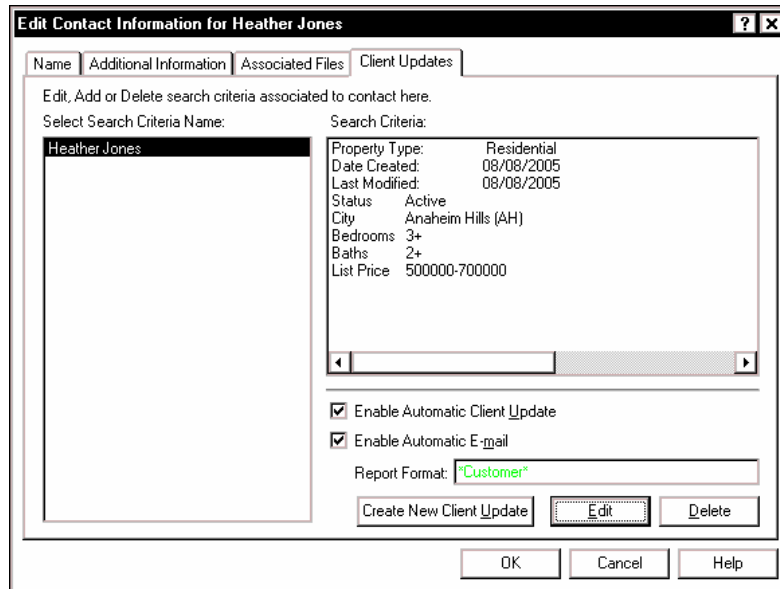
- The Search Window will open. Make your changes and click OK. In our example, we added a price range. If you don't have any changes to your search criteria, then click OK to open the e-mail window.

- The e-mail window will open. Make any necessary changes and click OK. If you don't have any changes, then click OK to open the e-mail report option window.

6. Select a different report and click OK. If you don't need to change the report, then simply click OK to get back to the Client Updates tab.



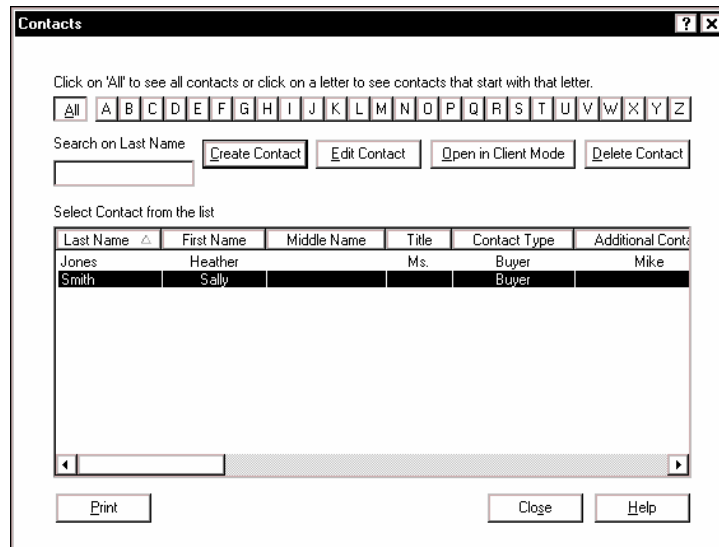
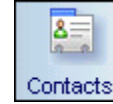
7. Verify any changes that you made. Be sure that the Enable Automatic Client Update and Enable Automatic E-mail functions are selected as well as verifying the report format. Click OK to get back to the Contacts window.



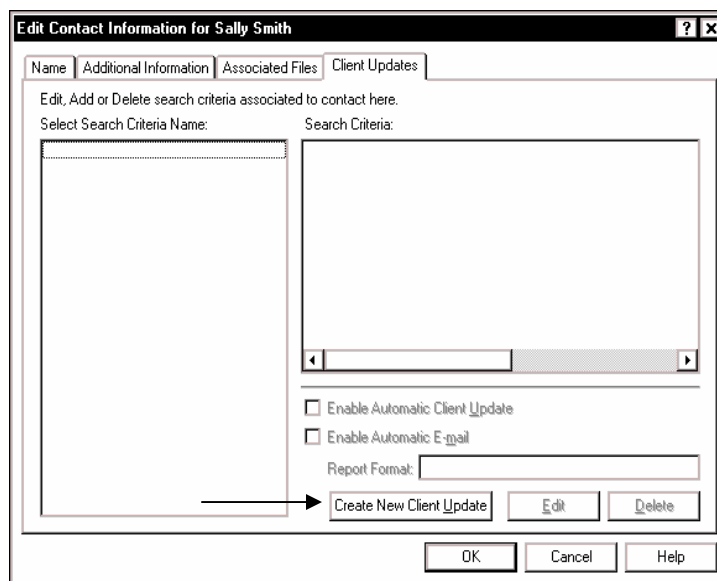
Adding Search Criteria for a Contact at a Later Time

Let's say you started adding a client using the Contact Database, but found yourself out of time and did not get a chance to add your client's search criteria. To come back in at a later time and add the search criteria to a contact follow the steps below:

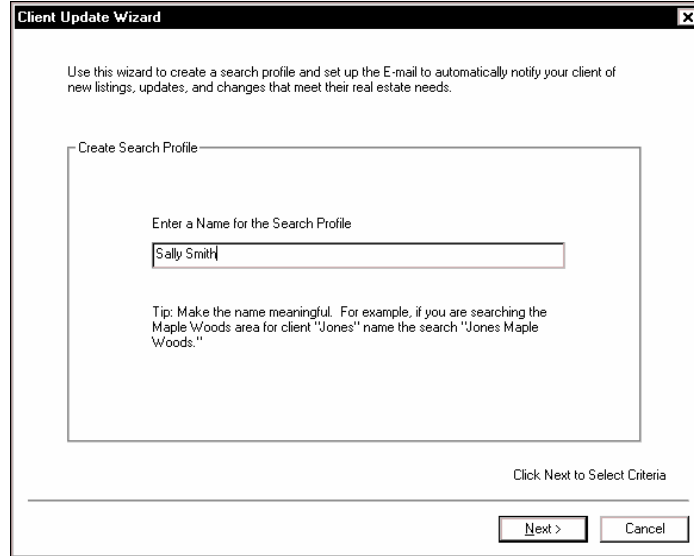
1. Click **Contacts** on the Features and Functions Toolbar or click on **Tools > Contact Database > Contacts**.
2. Highlight the name of the contact and click on the **Edit Contact** button.



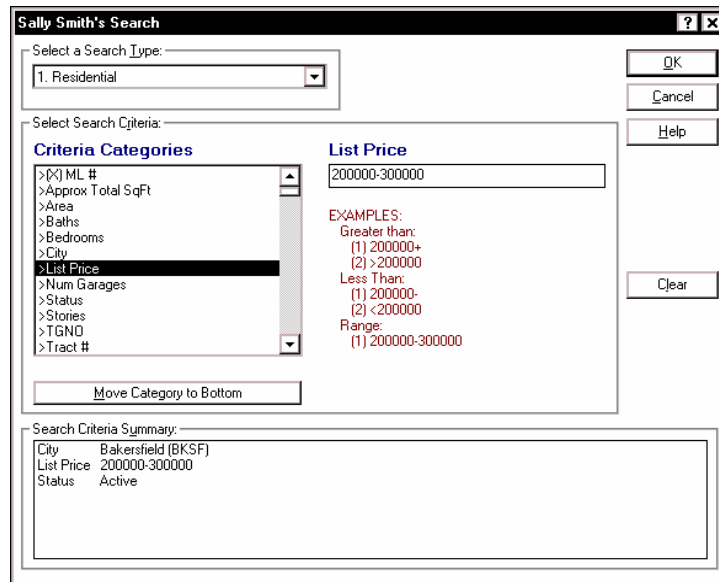
3. Click on the Client Updates tab and then click on the **Create New Client Update** button. This opens the Client Update Wizard.



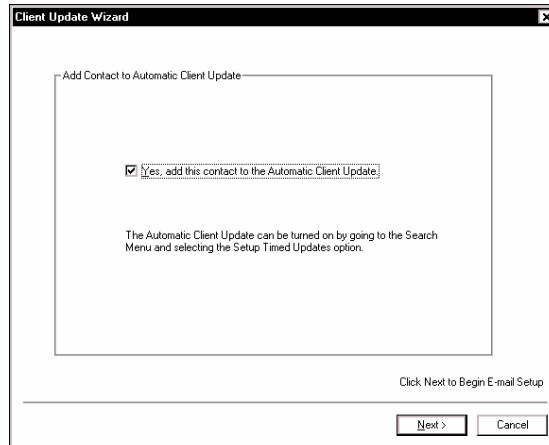
4. Enter a name for the Search Profile and click Next.



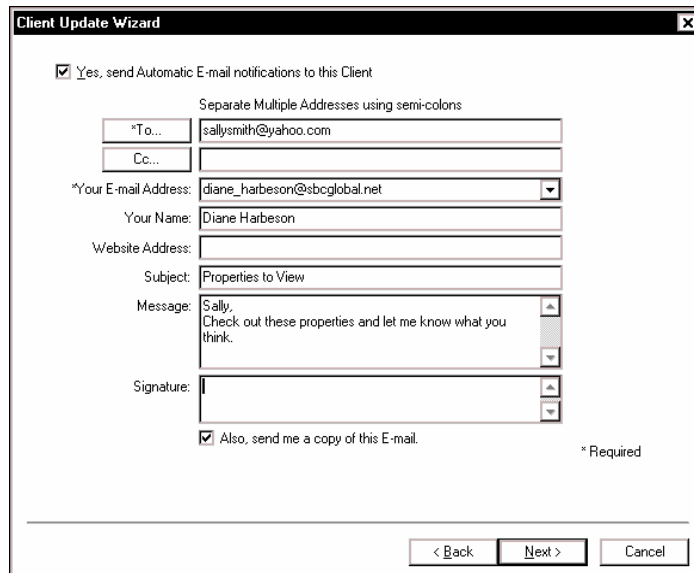
5. Enter the search criteria and click OK when finished.



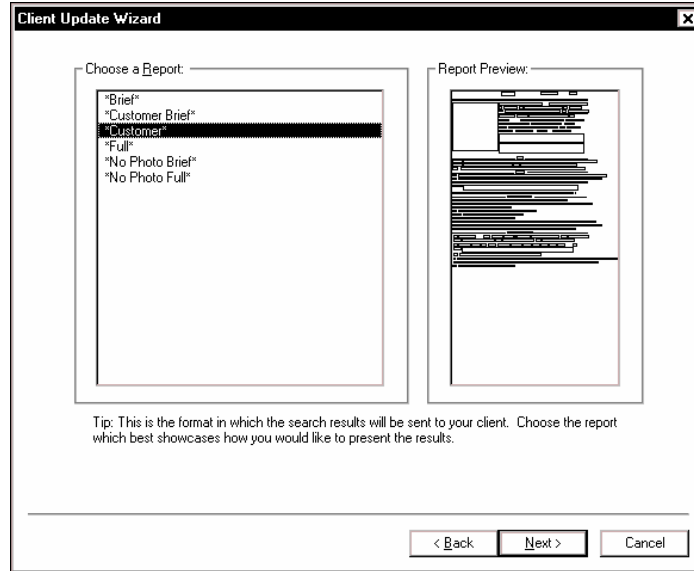
- The program automatically selects the option to add the contact to the Automatic Client Update. If you keep it selected, then the program will automatically e-mail the results of the Automatic Client Update to your client. The e-mail will include new listings, listings with price changes and listings with status changes (see Tutorial 16 – Automatic Client Update). Uncheck the box if you do not want to include this client in your Automatic Client Update list. The program will bypass the E-mail setup and take you to the Client Mode. Click Next to continue.



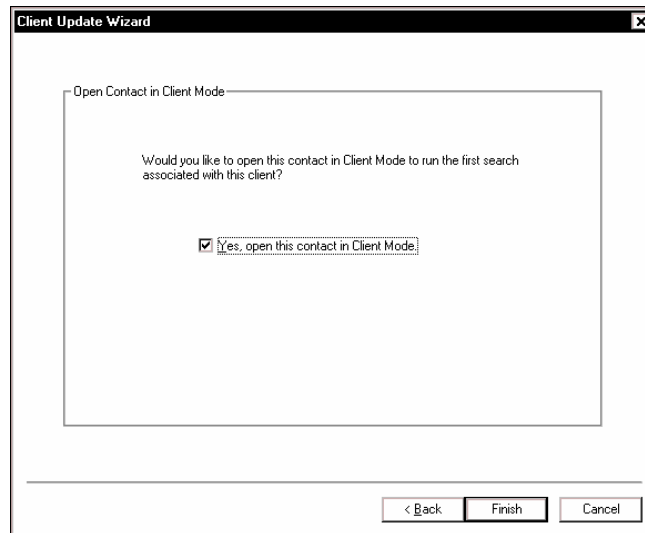
- Your client's e-mail address (if entered in the name/contact information tab) will populate in the To section. You can change or add additional e-mail addresses. Your e-mail address, your name, website address, and signature will auto populate if you entered this information in **Options > Preferences** (see Primary Agent and Brokerage). Enter a subject and message. You can also request a copy of the e-mail by checking the option at the bottom of the window. Click Next to Continue.



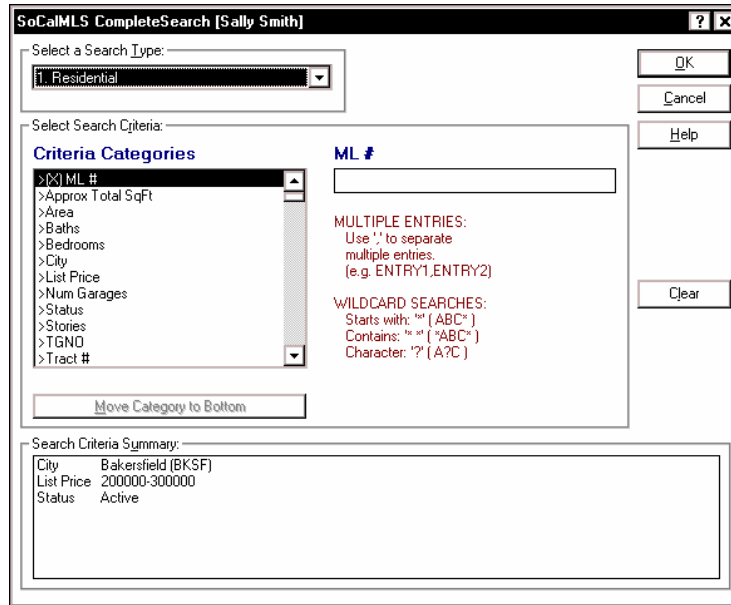
8. Select a report format for the e-mail by highlighting the report name. If you are sending the update to your client, be sure to select a client only format. You will see an example of the report format in the Report Preview area to the right of the list. Click Next to continue.



9. The program automatically selects the option to open this contact file so that your search criteria will automatically populate and the saved search results will be associated to this contact. Click Finish.



10. The Search window opens with your search name in the Title Bar along with the criteria that you already added for your client. Click OK to get your matching listings.

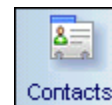


11. Feel free to edit your Property Listing Table (see Tutorial 8 – The Property Listing Table). This becomes your initial list of properties for your client. You can print this list for your client or you can e-mail them the list (see Tutorial 13 – E-mailing Reports, the Property Listing Table and Financials). **From this point forward, the automatic client update function will e-mail any changes from the initial list including new listings, listings with price changes and listings with status changes.**
12. Save the results by clicking on **File > Save As**. The program will automatically name your file for you. Click the **Save** button.
13. Close out of your client’s results by clicking the lower X at the top right hand corner on your screen or by clicking **File > Close**.
14. Your client’s name is still in the Title Bar so you must close out of your client mode by clicking **File > Close Contact**.

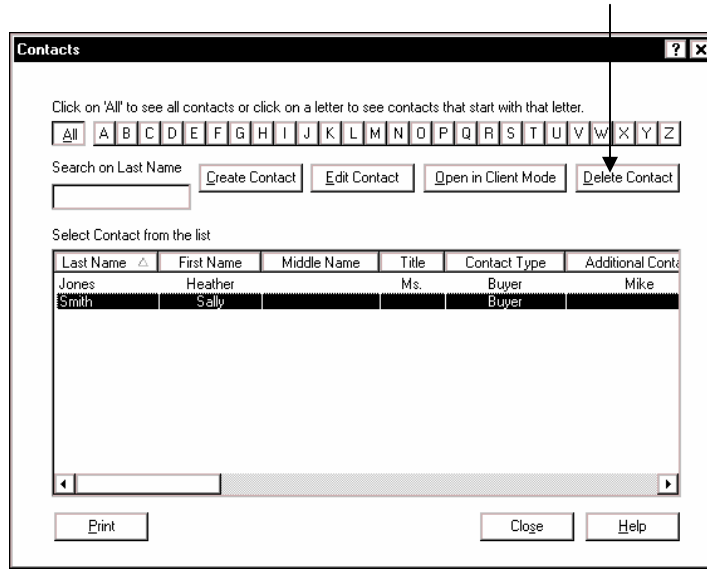
Deleting a Contact

To delete an existing contact follow the steps below:

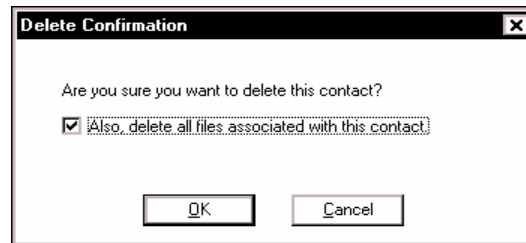
1. Click **Contacts** on the Features and Functions Toolbar or click on **Tools > Contact Database > Contacts**.



2. Highlight the name of the contact to delete and click on the **Delete Contact** button.



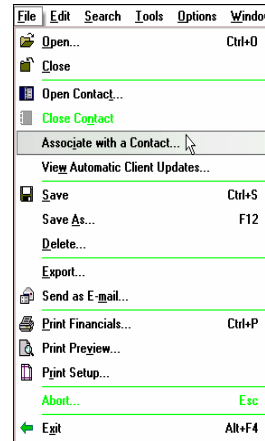
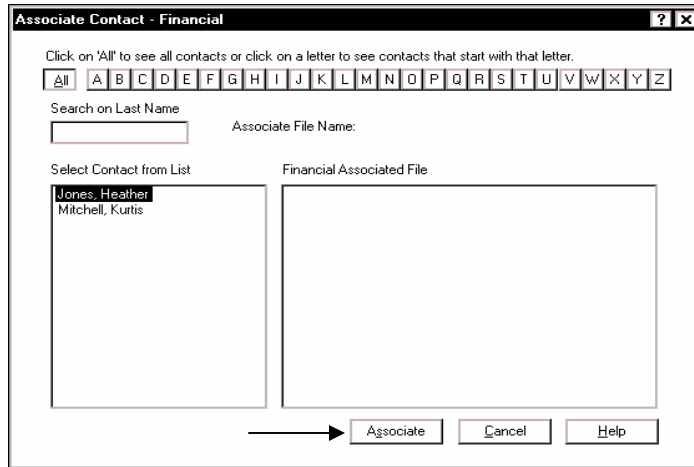
3. Check the box to delete the associated files with this contact and click OK.
4. Click the Close button to close the Contacts window.



Associating Files

The Associate with a Contact function lets you associate files of any type (search results, financials, CMA and Buyer Tour files) with a particular client. In our example, we are associating a financial file.

1. Run a financial report for your client or open a saved financial file so that you are looking at the report (see Tutorial 12 - Financials). Be sure to save your file.
2. Click **File > Associate with a Contact**. The Associate Contact-Financial window opens.
3. Click on the desired contact name and click the **Associate** button.

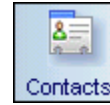


4. Close out of your client's results by clicking the lower X at the top right hand corner on your screen or by clicking **File > Close**.
5. Your client's name is still in the Title Bar so you must close out of your client mode by clicking **File > Close Contact**.

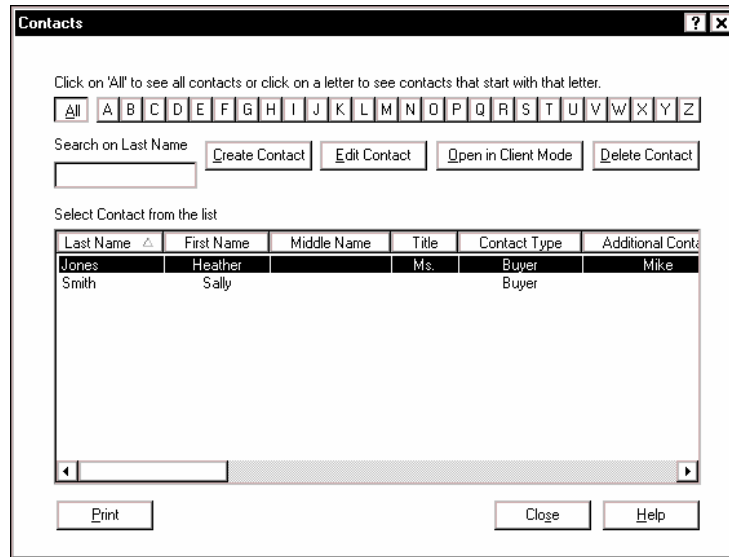
Viewing Associated Files

To view a list of the files associated with a client:

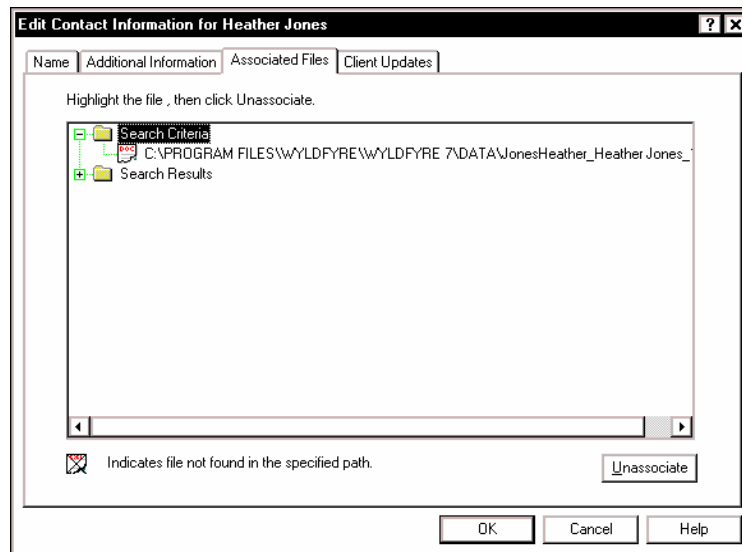
1. Click **Contacts** from the Features and Functions Toolbar.



2. Highlight the name of the contact and click on the **Edit Contact** button.



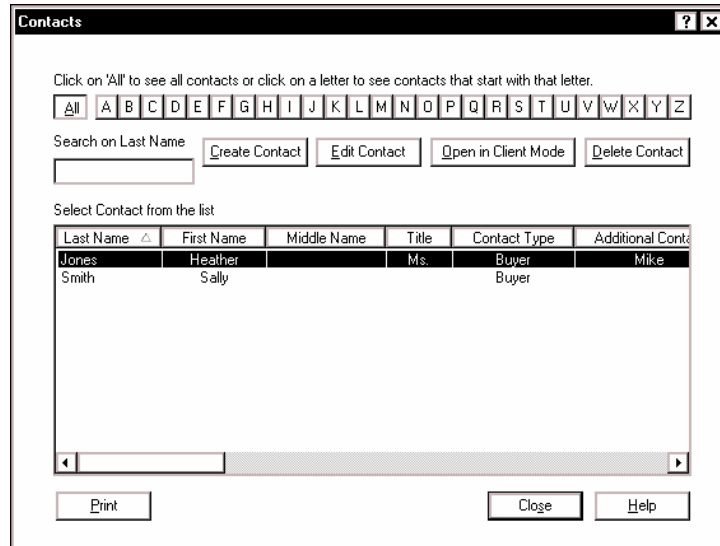
3. Click on the Associated Files tab. Click on the + sign to see a list of associated files. Click OK to get back to the Contacts window.



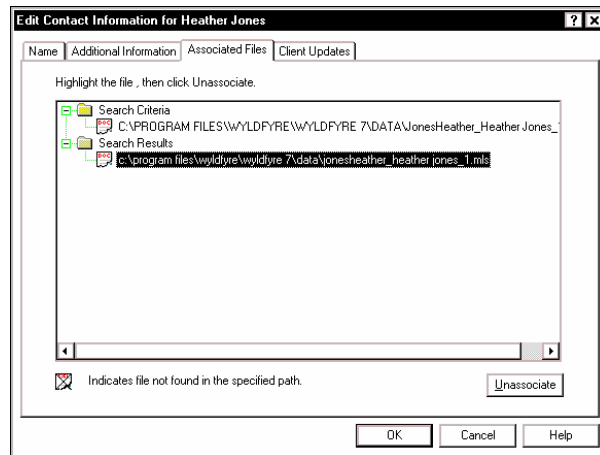
Unassociating Files

To unassociate a file currently associated with a contact:

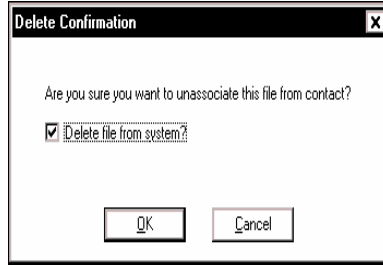
1. Click **Contacts** from the Features and Functions Toolbar.
2. Highlight the contact name and click on the **Edit Contact** button.



3. Click on the Associated Files tab. Click on the + sign to see a list of associated files.
4. Highlight the file to unassociate and click the **Unassociate** button.



5. Check the box to delete the file from the system and click OK.

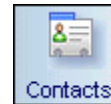


6. Click OK one more time to close the Edit Contact window.
7. Click the **Close** button to close the Contacts window.

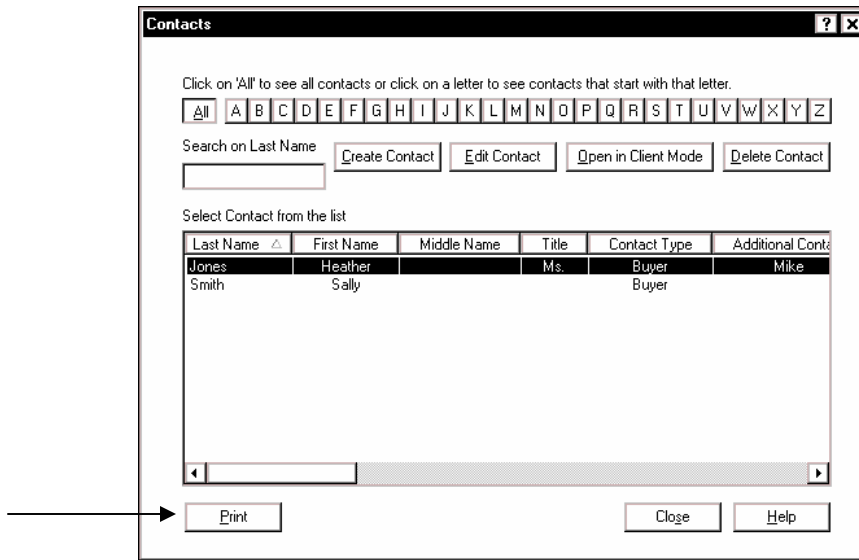
Printing the Contact Database

You have the option to print your contact database in three different formats: Brief Format (information columns combined), Full Format (standard report form) or Card Format (concise printing in vertical format).

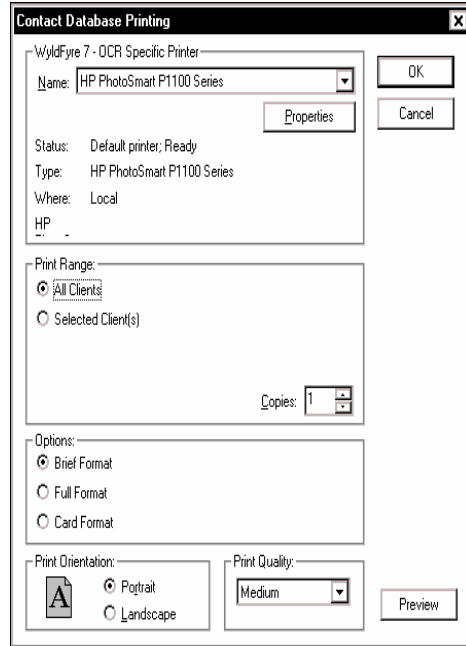
Click **Contacts** from the Features and Functions Toolbar and then click **Print** button.



the



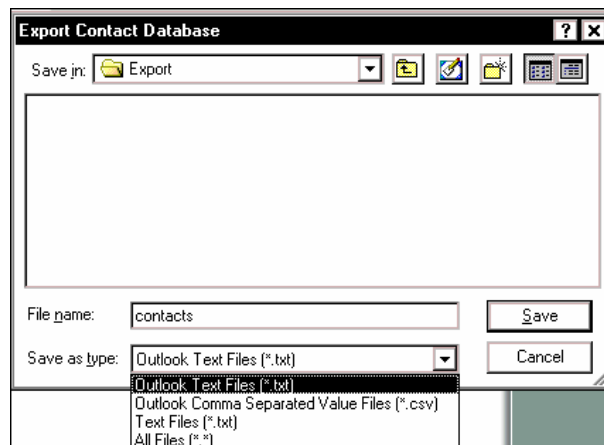
- ❖ It displays the default printer. Click on the drop down box to select alternate printers.
- ❖ You can choose the number of copies to be printed.
- ❖ Select All Clients or just the one client selected.
- ❖ Select Brief, Full or Card Format.
- ❖ The Print Orientation allows you to choose between Portrait or Landscape.
- ❖ To preview the format, click on the Preview button.
- ❖ Click the OK to print.



Exporting the Contact Database

You can export your Contacts to another software program as a standard text file. The text file can then be imported into any software program that accepts text programs. To export your client data, follow the steps below.

1. Click on **Tools > Contact Database > Export**. This opens the Export Contact Database dialog box.
2. Type a name for your file in the File name field. In our example, we named our file contacts.



3. The file is automatically saved as a Text File (.txt) in the User directory unless you change the directory. You can save the file wherever you like.
4. Click the Save button and when finished, a window opens to confirm the export was successful and the path where you can find the exported file.



5. Import your file into a similar program.

Importing the Contact Database

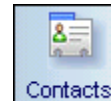
The program allows you to import a text file from another software program into your Contact Database. The file must be formatted properly; it must contain the same fields in the same order as the Contact Database.

1. Click on **Tools > Contact Database > Import**. This opens the Import Contact Database dialog box.
2. Find your file to import into your Contact Database.
3. Click on the Open button and your Contact Database will import the text file. A window opens to confirm the import was successful.

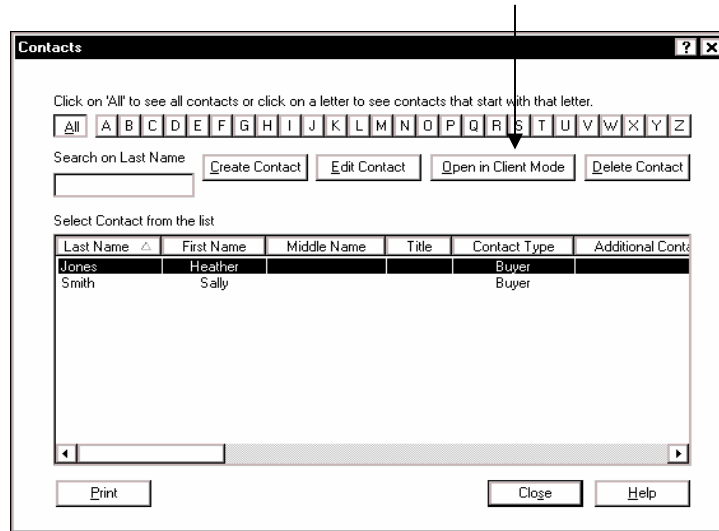
Opening Associated Files for a Contact

If you would like to open any associated files that you have saved, then you need to open the contact in Client mode versus Edit mode (that is for viewing only).

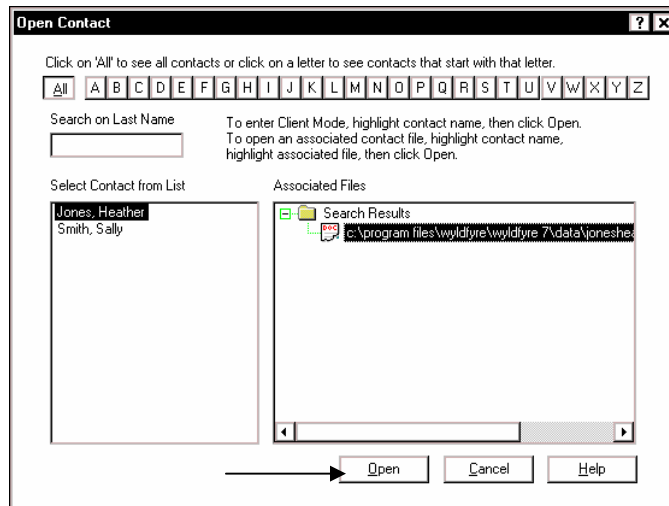
1. Click **Contacts** on the Features and Functions Toolbar or click on **Tools > Contact Database > Contacts**.



- Highlight the name of the contact that you wish to open a file. Click on the **Open in Client Mode** button.



- Highlight the contact from the list in the left column. When you select a contact, then the list of saved files will appear in the right column.
- Click on the + sign to view the list of files. Highlight the file to open and click on the Open button. Your Property Listing Table will open with any changes that have occurred.



- Close out of your client's results by clicking the lower X at the top right hand corner on your screen or by clicking **File > Close**.
- Your client's name is still in the Title Bar so you must close out of your client mode by clicking **File > Close Contact**.

Exercise 10: Creating a Seller's Net Sheet

Create a Seller's Net Sheet for your Client using the following data:

- Use any Client's Name and Address.
- **Home Sales Price** of \$350,000
- **Interest Rate** of 7.0%.
- **First Loan Balance** of \$150,000
- \$9000 for the **Brokerage Fee** (be sure to click on the \$ option under Brokerage Fee)
- **Additional Costs** to include:
 1. Roof Repair
 2. Pest/Termite Inspection and Report
 3. Reconveyance Fee
- Be sure to **Preview** your report and **Save** the Seller's Net Sheet.

Exercise 11: Adding a Client to your Contact Database

- **Add** a client to your **Contact Database** and **follow the wizard**.
- Search for a **house** with **3 or 4 bedrooms** and **at least 2 bathrooms**. Their **price range is \$300,000 or higher**. Select a District, or City or Area that applies to your MLS.
- Be sure to add your contact to the Automatic Client Update.
- When you are done adding the client, be sure to **open** the contact file so that you can **launch the search**. Open the **search** window and submit your search.
- Save the search results (*Hint: File menu*).
- Be sure to **close** your Property Listing Table and then **close** the contact.

Exercise 12: Associating a File

- **Open** one of your **saved financials** and **Associate** it with the client you added in exercise 11. Be sure to go all the way through the wizard to get to the report.
- Go back to your Contact Database and view your Associated Files for this contact. Your financial file should be listed.