



Contact Manager-Adding a Contact *Tips and Tricks* August 2008

The Contact Manager has a series of workflow tabs starting with General Information of your contact. This page is where you will enter the typical information such as names, addresses, phones, email, etc. Always start with the General Information tab.

From the main menu, Click **Contacts** and the control panel will appear below. Click **Add Contact/ Prospect**.



The General info tab will be open ready for your contact info. Fill in the boxes with as much info as you have. The more info you can save now, the better prepared you will be every time you contact them.

There are only 2 required fields—First and Last Name.

There is a Quick Start Guide for each tab.

Page 2 & 3 of this guide will help you fill in the General info tab.

General Listing Info Notifications More Info Summary

Contact/Prospect Information

This contact is Active Inactive

Prefix

R First Name: MI

R Last Name:

Suffix

Company:

Job Title:

Secondary Contact:

Manage Contact

Types: Buyer Seller Other

B's <\$100K B's \$300K-\$400K R. E. Associates

Groups: B's \$100K-\$200K Sellers Agents

B's \$200K-\$300K Family & Friends

Use Reverse Prospecting Alias:

Note: Allows agents to match properties to this prospect. Your name and prospect's alias name will be displayed in search results.

Source:

Source Comments:

Address

Home Primary?

Address 2:

City: State:

County:

Zip: Country:

Telephone Primary?

Home Ext.

Work Ext.

Personal Cellular Ext.

Work Cellular Ext.

E-Mail/Internet Primary?

E-Mail:

Web Site Address:

Instant Msg Address:

Save this Contact Close



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The first module is simple enough to fill in. When you are later searching for contacts, there is an Active/Inactive filter available. Some contacts may not be actively looking for a home.

Contact/Prospect Information

This contact is Active Inactive

Prefix

R First Name MI

R Last Name

Suffix

Company

Job Title

Secondary Contact

Groups help you define a contact and makes it easier to find them for sending new or changed listings to or changes to your business.

Reverse Prospecting is a tool that Listing Agents can use to notify you when they have a listing that matches one of your buyers.

Manage Contact

Types Buyer Seller Other

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Use Reverse Prospecting Alias

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Source

Source Comments

A contact can be a Buyer and a Seller

They can be included in several groups.

See "Manage Groups" on how and why to create groups.

See "Reverse Prospecting" on reasons to use this setup for a contact

Add an address for home, then go to the drop down and click **Work**. Then add the address for their work.

Primary tells Paragon that this is the main address for when Paragon pulls an address for an auto-fill situation such as the Cover Letter in the CMA presentation.

Address

Home Primary? Contact Requests Privacy

Home

Work W

Post Office Box

Other

Address 2

City State

County

Zip

Country

The drop down menu will let you add several addresses.

Contact Requests Privacy is a "flag" to you to not include them in bulk marketing



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Phone numbers for a client could be many and the drop down choices will let you choose a specific name for each one.

			Primary?
Home	(913) 693-0000	Ext.	<input checked="" type="checkbox"/>
Work	(913) 693-0000	Ext.	<input type="checkbox"/>
Personal Cellular		Ext.	<input type="checkbox"/>
Personal Cellular		Ext.	<input type="checkbox"/>
Personal Pager		Ext.	<input type="checkbox"/>
Work Pager		Ext.	<input type="checkbox"/>
Other		Ext.	<input type="checkbox"/>
Fax Machine Work		Ext.	<input type="checkbox"/>
Fax Machine Home		Ext.	<input type="checkbox"/>

As with Addresses, you can have multiple phone numbers for your contact.

When you have multiple email addresses for a contact, mark one as the primary. Some Paragon email functions will then know which address to use in an email compose box for you. Such as on the Auto - Notification email function.

		Primary?
E-Mail	Home craig@abc.com	<input checked="" type="checkbox"/>
Web Site	Home www.thebuyers website.com	<input type="checkbox"/>
Instant Message	Other craig'sinstantmessage	<input type="checkbox"/>

Multiple E-mail addresses can be listed. Make one the primary.

Always save your General Contact information before you move on to another tab.

