

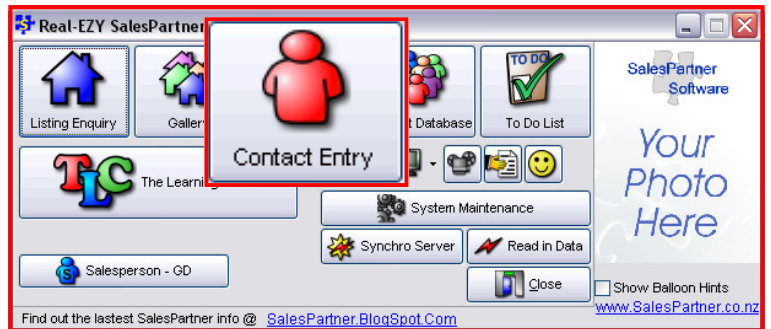
SalesPartner Training Guides:

Entering Contacts into SalesPartner

Welcome to your first SalesPartner Training Guide! Let's start by entering a new contact into SalesPartner.

From the front screen of SalesPartner, go into Contact Entry.

In the Contact Entry Screen, click on the + button to add a new contact



Title and Initials followed by Surname will print above the address.

If you need more address fields, try the Advanced or Custom tabs.

Click on this button to put the contact into Databasing Groups.

You can type the first name after the phone number as shown.

Here's how this contact's details would print on a SalesPartner letter:

Mr B and Mrs A Conway
47 Waterford Street
Uptown
Wellington

Dear Bob and Anne,

SalesPartner Training Guides:

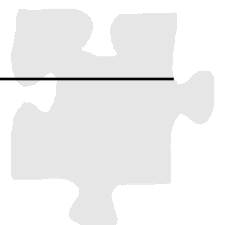
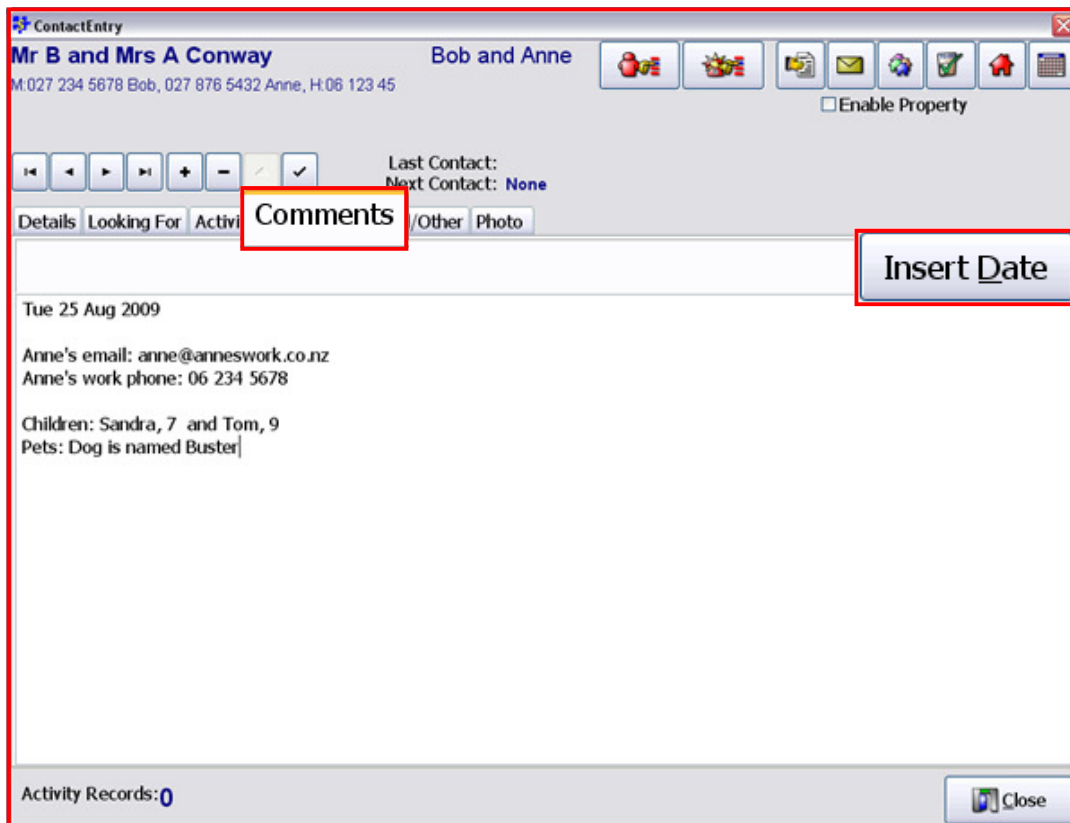
Entering Contacts into SalesPartner

Now that we've added our new contact, let's add some more information in the Comments tab.

From the Contact Entry screen, click on the **Comments** Tab.

Here we can enter more information about our contact including kids names and ages, pets names and further contact information.

Before entering a Comment, click on the **Insert Date** button.



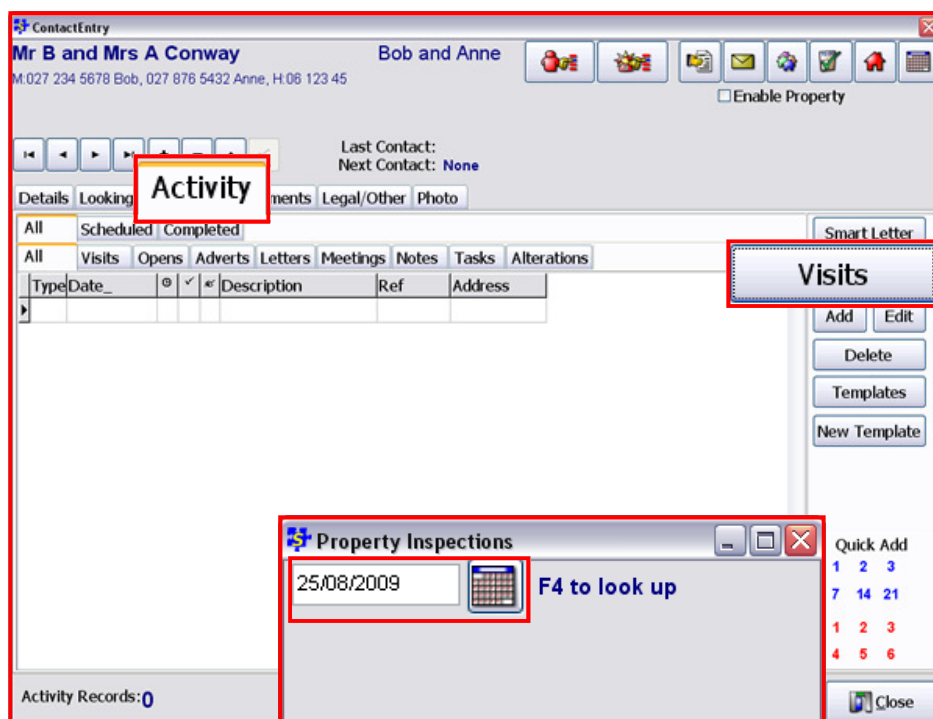
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Now we can add property visits and record correspondence with our contact in the Activity tab.

Click on the **Activity** Tab.

To enter a property inspection, click on the **Visits** button.



In the **Property Inspections** window, select the date of the inspection.

Then Select the Listing using the **Listing Lookup** button.

In the **Comment** field, you can write a short description of the contact's interest.

SalesPartner tip:

Use keywords in the **Comment** field such as Interested, Looking, or Visitor. If you use these keywords, then you'll be able to look up all the Interested buyers for a property when offers are presented or when a similar property is listed.

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Now we can add details about what our contact is looking for.

Click on the **Looking For** Tab.

If you have not yet discussed the contacts requirements, just enter the bedrooms and price of the property that they've visited.

In the **Other** field, you can enter any more information that would help you find the right property for these contacts.

Mr B and Mrs A Conway Bob and Anne
M.027 234 5878 Bob, 027 876 5432 Anne, H.06 123 45

Enable Property

Last Contact:
Next Contact: None

Detail **Looking For** Activity Comments Legal/Other Photo

Bedrooms 3 3 or 4

Price 350000 An indication of what this buyer can afford and is likely to spend

Requires

Category

Style Use the options under the System

Location Use the options under the System

Production Maintenance Button to add to these Lists

Land Area

Floor Area

Other As an investment

Activity Records: 0

Close

What we've covered

- ⇒ We've entered the Conway's into our SalesPartner Database
- ⇒ We've put them into our Latest Listings by Email Group so that they are included in our weekly weblink email. (For details about how to use the SalesPartner weblink, see the Intermediate Training Booklet or ring SalesPartner 04 4711 849)
- ⇒ We've entered some extra information about them in the **Comments Tab**
- ⇒ We've recorded a visit to 63 Plum Road
- ⇒ We've entered in details about what kind of property the Conway's are looking for

