

SalesPartner Training Poster:

Looking up Visitors

Lookup visitors to a listing so that you can then inform them of an upcoming auction/tender; a price reduction; an offer being accepted or a sale. You can also invite these clients to view a similar listing.

Looking up all the Visitors

Filter by Activity

Lookup Listing

Reports

Letters

ActivitySelect

Select Contacts with activity matching

For this listing 78 Elm Road

Activity Type: **Visits / Inspections**

Scheduled/Completed: All Activity

Activity Date Within:

- Any Time
- Last Year
- Last Month
- Last Week
- Last 3 Days
- Next 3 Days
- Next Week
- Next Month
- Next Year
- Date Range

Description Includes:

Surname	FullName	E-mail	add1	PhoneDetails	Ty
► Aguilar	Ms C Aguilar		19 Sycamore Avenue	H:341 5059, F:612 0713	Inv
Allison	Mr M Allison	e Michael@SalesPartner.co.nz	5 Walnut Road	H:840 6246, F:270 4139	
Baker	Ms N Baker		44 Birch Avenue	F:681 9705	Wc
Ballard	Mr L Ballard		45 Cedar Road	H:225 8104, F:328 7142	Ne
Barker	Mr C Barker		73 Linden Lane	H:121 9985, F:144 0462	
Bates	Mr H & Mrs A Bates		6 Palm Crescent	H:655 0340, F:557 5916	Ch
Beck	Mr D & Mrs A Beck	e DarnellAndAnnie@SalesPartner.co	88 Oak Street	F:650 8674	Ch

Start in Contact Database, lookup the listing which has sold. Go to the Filter by Activity Button, Here you tick For this Listing, select Visits/Inspections in the Activity Type menu, then press OK.

Now you have all your buyers who have visited this property and you are ready to send or email them a letter, or print a phone list in the Reports menu so that you can call them.

If this listing has gone under contract, try using the letter *CFP Sold Property unconditional*.

If the listing's Auction/Tender closing date is approaching, try the letters *CFP follow up before Auction/Tender*

Inviting visitors to a similar listing

A new listing has come to market similar to the one that has just sold. You can now find all the people who visited the sold property, and invite them to the new one.

Step 1: Lookup the visitors for the sold property the same way you did above (Contacting all Visitors).

Lookup Listing

Print Letters

ActivitySelect

Select Contacts with activity matching

For this listing NU4182 57 Alder

Activity Type: **Visits / Inspections**

Scheduled/Completed: All Activity

Activity Date Within:

- Any Time
- Last Year
- Last Month
- Last Week
- Last 3 Days
- Next 3 Days
- Next Week
- Next Month
- Next Year
- Date Range

Description Includes:

Surname	FullName	E-mail	add1	PhoneDetails	Ty
• Bates	Mr B Bates		50 Mulberry Crescent	F:848 8382	Ap
• Burns	Ms C Burns		28 Birch Avenue	F:208 2472	Ty
• Nguyen	Ms J Nguyen		1 Mulberry Crescent	H:159 7987, F:277 4407	
► Schwartz	Mr C Schwartz		24 Willow Terrace	V:652 8163, H:148 0827, F:813	

Step 2: In Contact Database, lookup the new listing, highlight a selection of the contacts who are showing, go to the letters and print or email letters to these contacts about this new listing.

In some letters, for example *CFP Re New Listing 1 photo*, details and a photo of the new listing will merge into the letter.