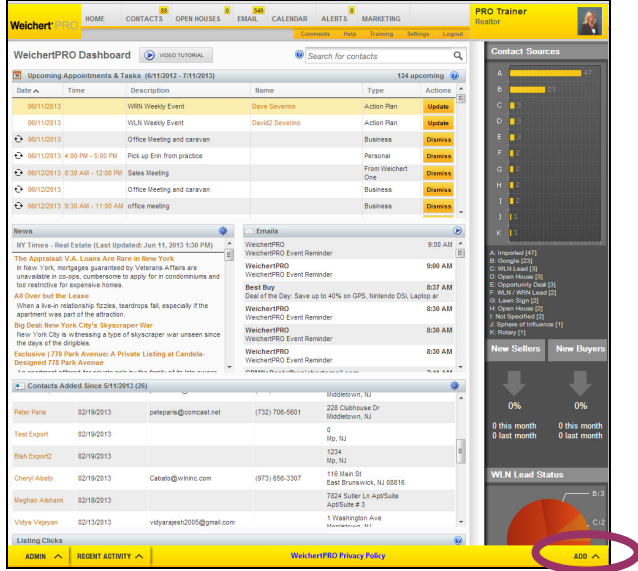
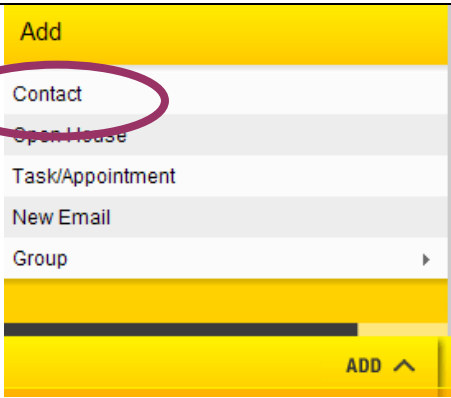


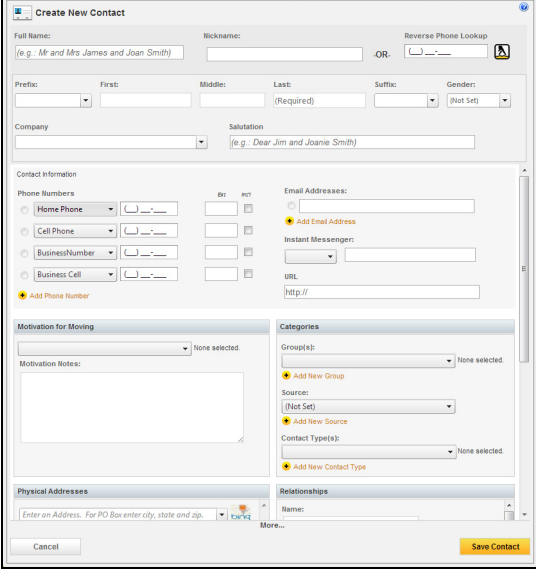
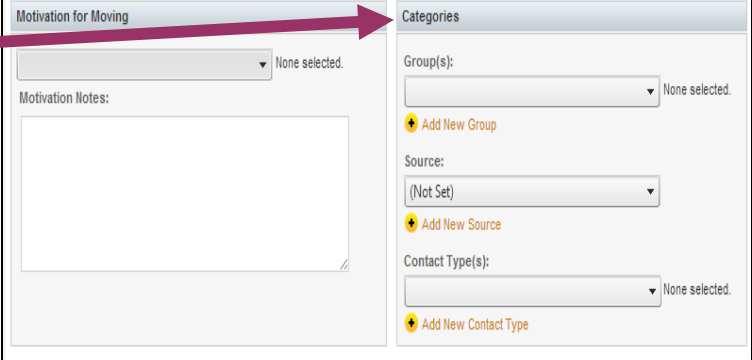
# WeichertPRO Job Aid – Add a Contact and Add the Contact to a Group

It's easy to add a contact in WeichertPRO. It is recommended to add a contact to a group the time the contact is created. For more information on adding groups, see the job aid 'Add a Group'.


## Add a Contact and add the contact to a group

STEP	SCREEN
<p>1. Go to: <a href="http://www.weichertpro.com">www.weichertpro.com</a> and log in</p> <p>2. From the bottom toolbar click "Add".</p>	 <p>The screenshot shows the WeichertPRO dashboard with various sections like 'Upcoming Appointments &amp; Tasks', 'Emails', and 'Contacts Added Since 5/11/2013 (26)'. A purple circle highlights the 'ADD' button in the bottom right corner of the dashboard.</p>
<p>A new menu will open.</p> <p>3. Select "Contact"</p>	 <p>The screenshot shows a dropdown menu with options: 'Add', 'Contact', 'Open House', 'Task/Appointment', 'New Email', and 'Group'. The 'Contact' option is circled in purple.</p>

# WeichertPRO Job Aid – Add a Contact and Add the Contact to a Group

STEP	SCREEN
<p>The 'Create a new contact' window will open</p> <p>4. Add the contact details.</p> <p><b>Tip:</b> Be as detailed as possible to make future follow up and building rapport easier.</p> <p><b>Note:</b> Salutation field will be the salutation that appears on any outgoing marketing templates and emails.</p>	
<p>Use the categories section to put your contacts into categories for targeted email marketing and follow up:</p> <p><b>GROUPS:</b> are used for more targeted marketing and sub categories (i.e., first time buyer)</p> <p><b>TYPE:</b> identifies high level categories such as buyer or seller</p> <p><b>SOURCE:</b> is for tracking your business and developing a plan to increase it</p> <p>5. Click the down arrow for a list or select 'Add New Group', 'Add New Type' and 'Add New Source' to create your own.</p>	

## WeichertPRO Job Aid – Add a Contact and Add the Contact to a Group

STEP	SCREEN
6. Scroll down and click "Save contact"	 A screenshot of a dialog box with a light gray background. At the top right, there is a link labeled "More...". On the left side, there is a button labeled "Cancel". On the right side, there is a button labeled "Save Contact" with an orange background.

### Additional Resources:

- **For Technical Questions: Call the Help Desk at 973-605-1619**
- **Or email at: [WLNHELP@WLNINC.COM](mailto:WLNHELP@WLNINC.COM)**
- For additional WeichertPRO training and our a library of video tutorials visit:  
**WeichertPRO.com → Training**