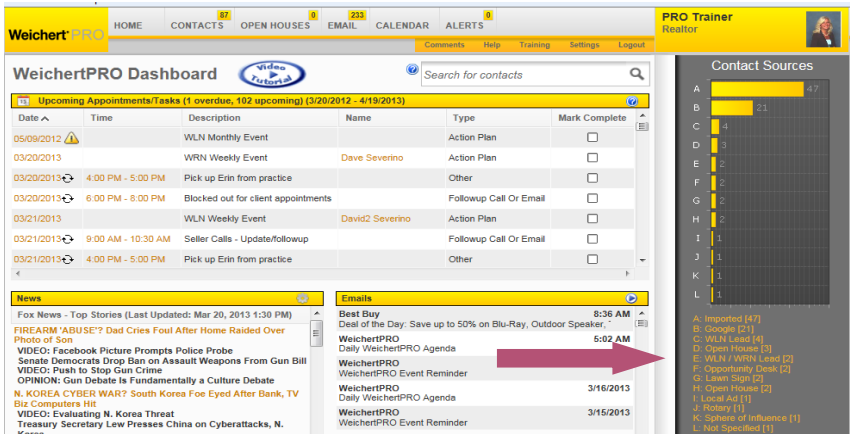
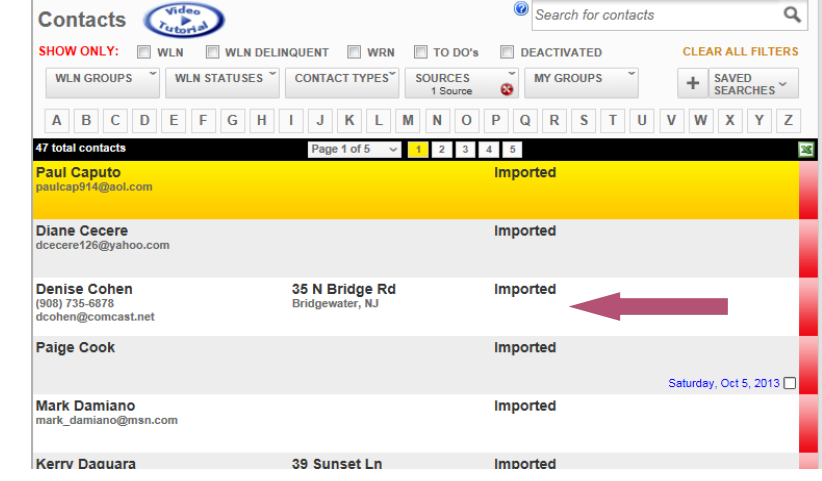
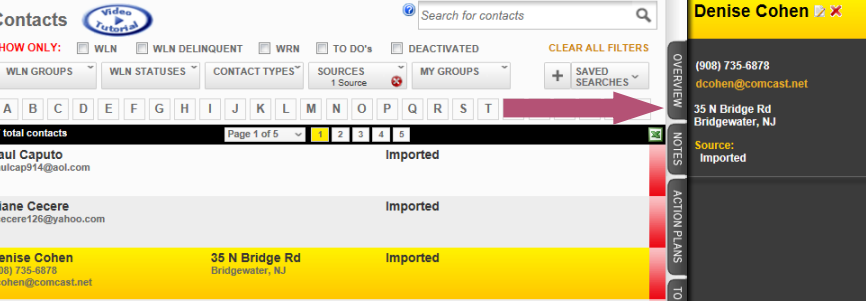


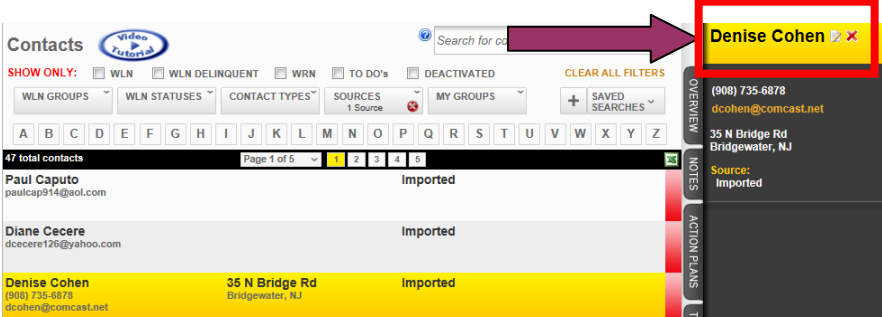
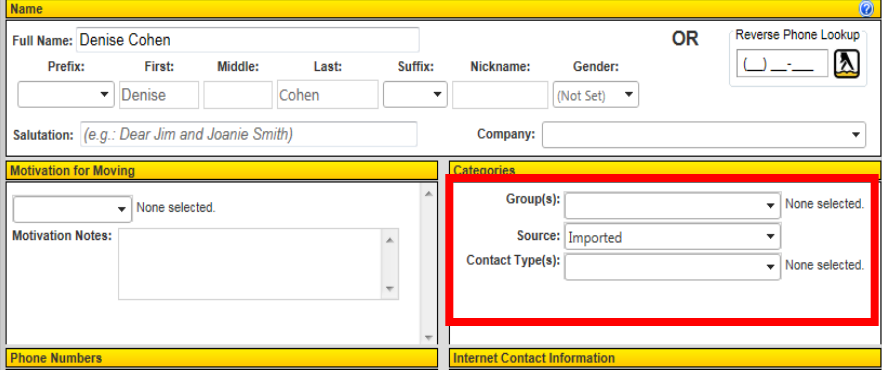
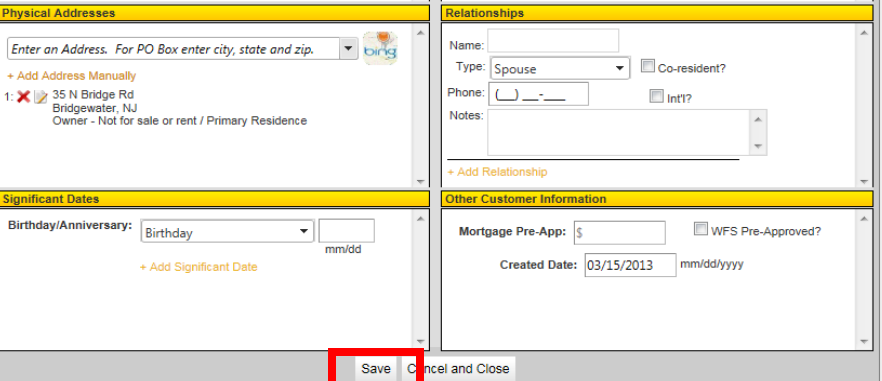
# WeichertPRO Job Aid – Contact Record Clean Up

After importing data from external sources, it is recommended that you go back into your database and clean up your contacts. One of the things you will have to do is clean up your sources. When you import from external sources, the sources will be identified as “google”, “imported” or “not specified” which isn’t a true depiction of the source. By doing this, you can keep an accurate account of where your sources are coming from for later reference. While you are in the contact record, we also recommend that you “group” and select a “type”. Reference the steps below:

## CONTACT CLEAN UP

Step	Screen
<p><b>1. Go To: <a href="http://www.weichertpro.com">www.weichertpro.com</a> and log in</b></p> <p><b>Locate the “Contact Source” section on the screen.</b></p> <p><b>2. Select from “imported”, “google” or “not specified”.</b></p>	 <p>The screenshot shows the WeichertPRO Dashboard with a sidebar for 'Contact Sources'. The sidebar lists various sources, and a red arrow points to the 'Imported' source category.</p>
<p><b>3. This will then take you into the contact page where the source you selected will be in an easy list for you to go and edit the records.</b></p>	 <p>The screenshot shows the 'Contacts' page with a list of contacts. The 'Imported' source is highlighted in yellow for each contact. A red arrow points to the 'Imported' source column.</p>
<p><b>4. Select each record by clicking on the row. The row that you selected will then be in yellow and the contact record will open on the right.</b></p>	 <p>The screenshot shows the 'Contacts' page with the 'Denise Cohen' contact record selected and highlighted in yellow. A red arrow points to the selected row, and another red arrow points to the contact record details on the right.</p>

# WeichertPRO Job Aid – Contact Record Clean Up

Step	Screen
<p><b>5. Select the "edit" icon or click on the name.</b></p>	 <p>Contacts <span>Video Tutorial</span> <input type="text" value="Search for contacts"/> <b>Denise Cohen</b> ✎ ✕</p> <p>SHOW ONLY: <input type="checkbox"/> WLN <input type="checkbox"/> WLN DELINQUENT <input type="checkbox"/> WRN <input type="checkbox"/> TO DO's <input type="checkbox"/> DEACTIVATED CLEAR ALL FILTERS</p> <p>WLN GROUPS WLN STATUSES CONTACT TYPES* SOURCES 1 Source MY GROUPS + SAVED SEARCHES</p> <p>A B C D E F G H I J K L M N O P Q R S T U V W X Y Z</p> <p>47 total contacts Page 1 of 5 1 2 3 4 5</p> <p>Paul Caputo paulcap914@aol.com Imported</p> <p>Diane Cecere dcecere126@yahoo.com Imported</p> <p><b>Denise Cohen</b> 35 N Bridge Rd Imported          (908) 735-6878 Bridgewater, NJ          dcohen@comcast.net Source: Imported</p>
<p><b>6. This will open the 'edit' contact window allowing you to edit the source, group and type.</b></p>	 <p>Name <input type="text" value="Denise Cohen"/> OR Reverse Phone Lookup</p> <p>Full Name: Denise Cohen</p> <p>Prefix: First: Middle: Last: Suffix: Nickname: Gender: (Not Set)</p> <p>Salutation: (e.g.: Dear Jim and Joanie Smith) Company:</p> <p>Motivation for Moving: None selected. Motivation Notes:</p> <p>Categories: Group(s): None selected. Source: Imported. Contact Type(s): None selected.</p> <p>Phone Numbers Internet Contact Information</p>
<p><b>7. Edit any additional information at this time and then click 'save'.</b></p>	 <p>Physical Addresses: Enter an Address. For PO Box enter city, state and zip. 1: 35 N Bridge Rd, Bridgewater, NJ, Owner - Not for sale or rent / Primary Residence</p> <p>Significant Dates: Birthday/Anniversary: Birthday mm/dd</p> <p>Relationships: Name: Type: Spouse Co-resident? Phone: Int'l? Notes:</p> <p>Other Customer Information: Mortgage Pre-App: WFS Pre-Approved? Created Date: 03/15/2013 mm/dd/yyyy</p> <p>Save Cancel and Close</p>