

WeichertPRO Job Aid – Navigating the Contact Management Page

The Contact Management Page offers several ways to search, sort and edit – in essence manage your contacts. The page will list all your contacts alphabetically; the system will create a “folder with tabs” for each contact for detailed record keeping and follow up. The steps below outline the basic functions. Please refer to the Video Tutorial for more details.

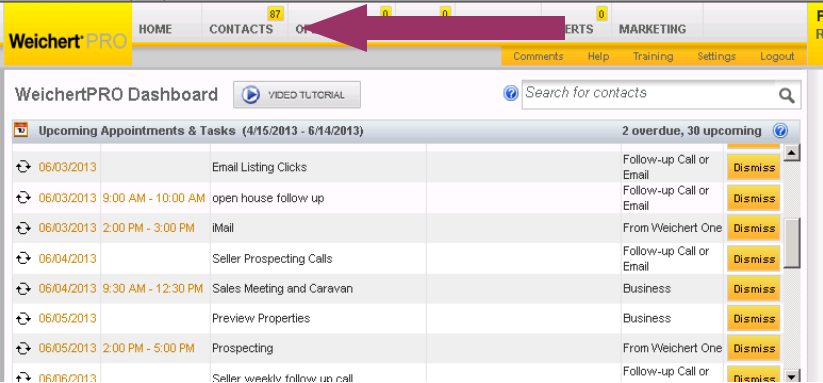
CONTACT MANAGEMENT

Step

Screen

1. Go To: www.weichertpro.com and log in

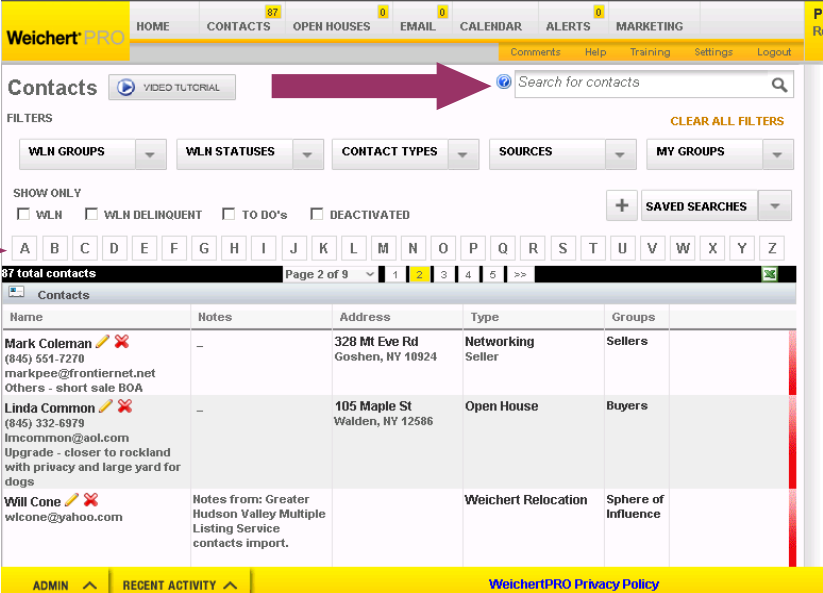
2. Select “Contacts”, from the top tool bar



The screenshot shows the WeichertPRO Dashboard. At the top, there is a navigation bar with tabs for HOME, CONTACTS (with a notification badge of 87), OPEN HOUSES, EMAIL, CALENDAR, ALERTS, and MARKETING. A purple arrow points to the CONTACTS tab. Below the navigation bar, there is a search bar labeled 'Search for contacts'. The main content area displays 'Upcoming Appointments & Tasks' for the period 4/15/2013 - 6/14/2013, with 2 overdue and 30 upcoming tasks. A list of tasks is shown with columns for date, task name, and actions like 'Dismiss'.

3. This will take you into the Contact Management Page. From this page you can search for a contact by Name, Address, Zip Code, Phone Number & Email.

Or, you can search alphabetically, by the first letter of First OR Last name.



The screenshot shows the WeichertPRO Contact Management Page. At the top, there is a navigation bar with tabs for HOME, CONTACTS (with a notification badge of 87), OPEN HOUSES, EMAIL, CALENDAR, ALERTS, and MARKETING. A purple arrow points to the CONTACTS tab. Below the navigation bar, there is a search bar labeled 'Search for contacts'. Underneath the search bar, there are several filter dropdowns: WLN GROUPS, WLN STATUSES, CONTACT TYPES, SOURCES, and MY GROUPS. Below the filters, there is a 'SHOW ONLY' section with checkboxes for WLN, WLN DELINQUENT, TO DO's, and DEACTIVATED. A purple arrow points to the search bar. Below the filters, there is an alphabetical search bar with letters A through Z. A purple arrow points to this bar. Below the alphabetical search bar, there is a table of contacts. The table has columns for Name, Notes, Address, Type, and Groups. The first three contacts are listed: Mark Coleman, Linda Common, and Will Cone. A purple arrow points to the alphabetical search bar.

Name	Notes	Address	Type	Groups
Mark Coleman (845) 551-7270 markpee@frontiernet.net Others - short sale BOA	-	328 Mt Eve Rd Goshen, NY 10924	Networking Seller	Sellers
Linda Common (845) 332-6979 lmccommon@aol.com Upgrade - closer to rockland with privacy and large yard for dogs	-	105 Maple St Walden, NY 12586	Open House	Buyers
Will Cone wlccone@yahoo.com	Notes from: Greater Hudson Valley Multiple Listing Service contacts import.		Weichert Relocation	Sphere of Influence

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4. Select the contact record by clicking on the row. The row that you selected will be in yellow and the contact folder will appear on the right.

Notice the Tabs along the side of the folder, to keep your contact information organized. Each note you add after a call or meeting will be in the "Notes" Tab. Each email you send or receive with the contact's email address will be saved in the "Email" Tab.

Refer to the Video/Tutorial "The Contact Record" for more details about the Contact Tabs

The screenshot shows the WeichertPRO Contact Management interface. At the top, there is a search bar and a 'VIDEO TUTORIAL' button. Below the search bar, there are filter options for 'MLN GROUPS', 'WLN STATUSES', 'CONTACT TYPES', 'SOURCES', and 'MY GROUPS'. A 'CLEAR ALL FILTERS' button is also present. The interface displays a list of contacts in a table with columns for 'Name', 'Notes', 'Address', 'Type', and 'Groups'. The contact 'Linda Common' is selected, and her record is highlighted in yellow. A red arrow points to the 'Notes' tab on the right-hand side of the contact record. The right-hand side of the interface shows the contact's details, including phone numbers, email address, and address. The 'Notes' tab is currently active, showing a note about a 'Motivation For Moving'.

Name	Notes	Address	Type	Groups
Linda Coleman		328 Mt Eve Rd Goshen, NY 10924	Networking Seller	Sellers
Linda Common		105 Maple St Walden, NY 12586	Open House	Buyers
Linda Cone	Notes from: Greater Hudson Valley Multiple Listing Service contacts import.		Weichert Relocation	Sphere of Influence

Additional Resources:

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