THE COMPLETE PROSPECTING GUIDE

A Better Way To Run Your Brokerage Business.

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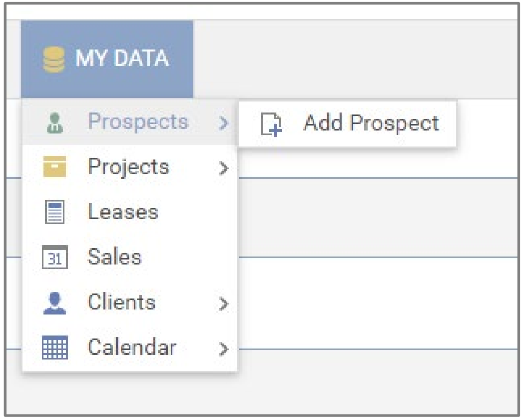
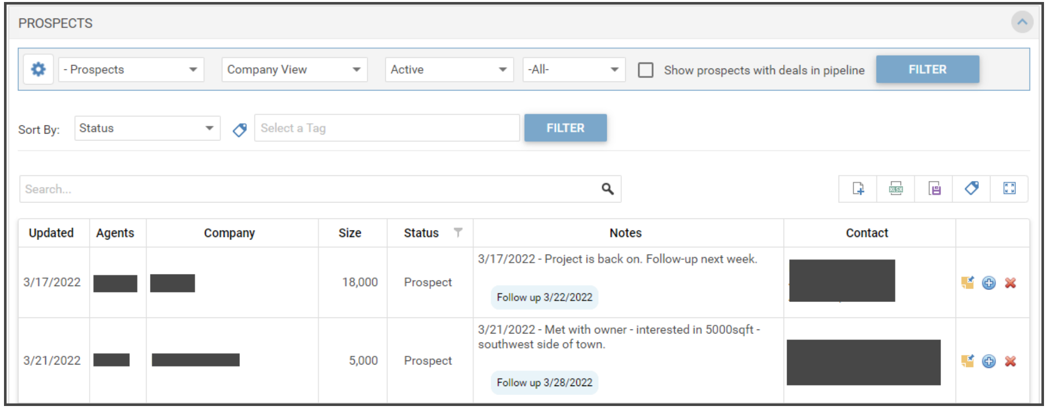
Accessing Your Prospects

Go to “My Data” at the top of your site and click on Prospects.

Your Prospects will appear on the screen. This is where you can search and filter your own Prospects.

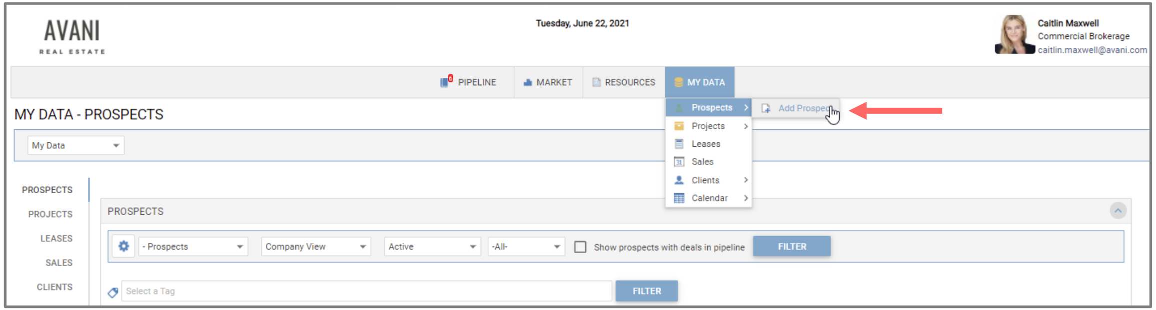


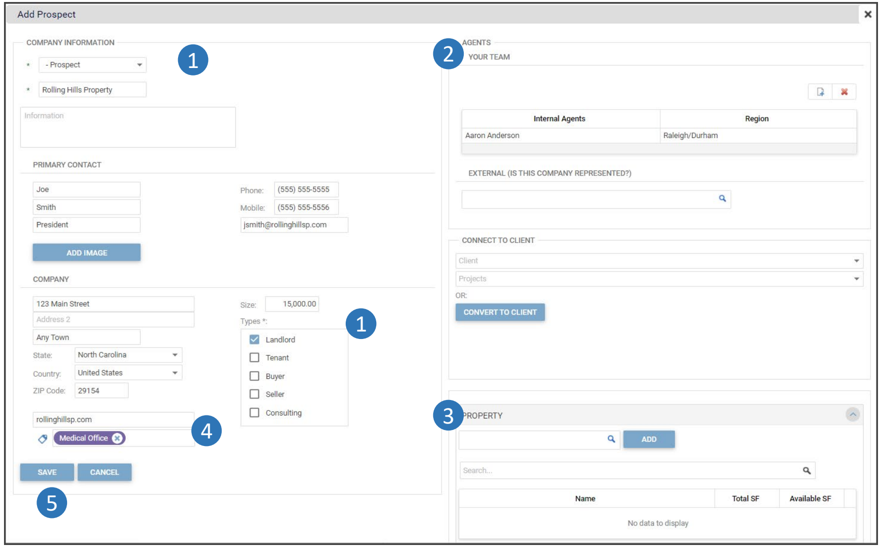


Adding a Prospect

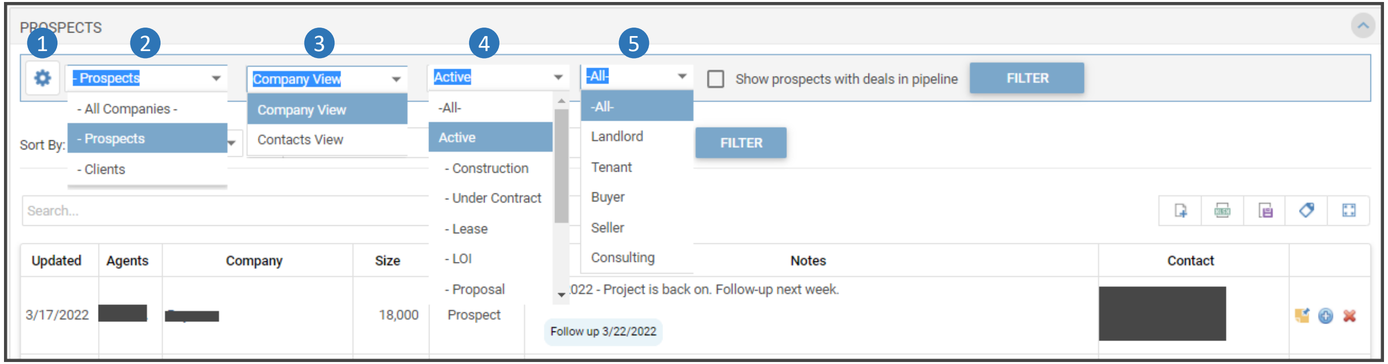
To add a Prospect, hover over "My Data" and go to Prospects.
Click on "Add Prospect". The "Add Prospect" screen will appear.

1. Fill out as much data as possible. The Status, Company and Type fields are required.
2. Add other agents you want to have access to the prospect. Once filled out, click “Save“.
3. You can tie the prospect to a property, if applicable.
4. Tags can also be added when creating Prospects.
5. Click “Save” to save your new Prospect.





Filters & Icons



The Prospects screen allows users to:

- Filter results for companies
- Create tags and filter companies by those tags
- Export a list of all or filtered companies
- Upload a list of prospects from an Excel spreadsheet
- Manage prospects

1 Set default settings for when accessing the page

2 **All Companies -** See Prospects and Clients in the same grid
Prospects - See Prospect companies
Clients - See Client companies

3 **Company View -** Shows a default company view with Prospect or Client Companies
Contact View - Show all the individual contacts at the Prospect or Client Companies

4 **Status** – See Prospects according to their status

5 **Type** – See Prospects according to their representation type

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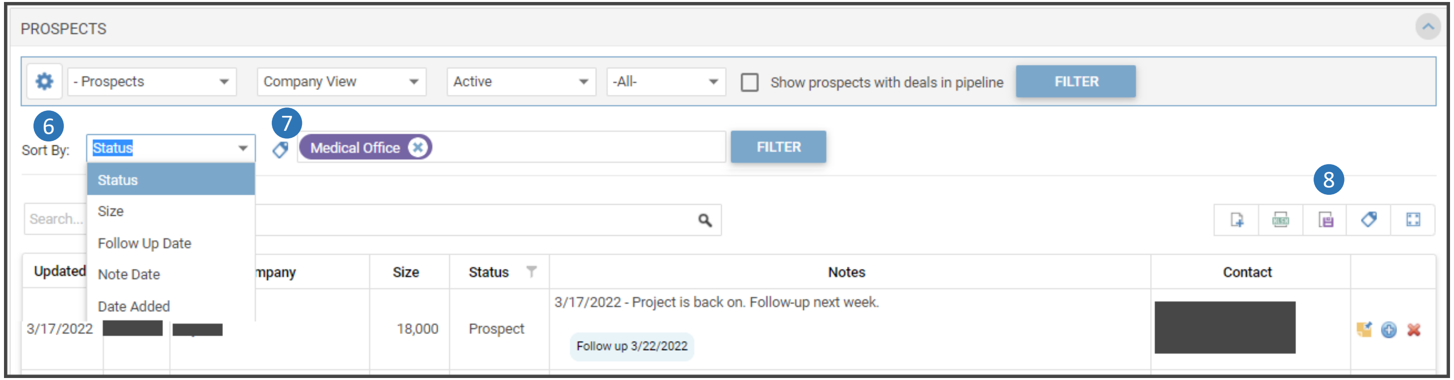
Filters & Icons



6 **Sort By –** Filter results even further using the options in the dropdown.

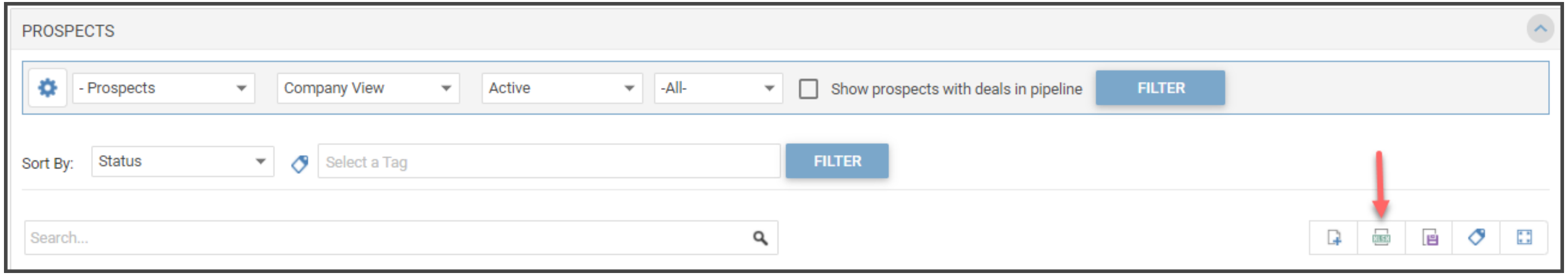
7 **Filter Results by Tag-** Use the dropdown menu to filter prospects or clients by those tags

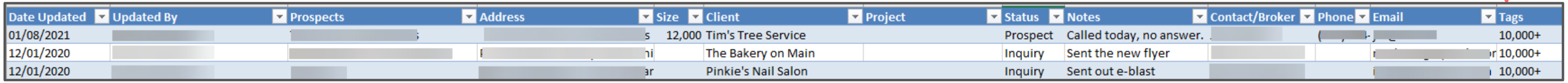
8 **Use icons to do the following:**

- Add a new contact
- Export your list (all or filtered) to an Excel spreadsheet
- Upload a list of your contacts from a spreadsheet
- Create tags to categorize companies
- Manage your prospects by adding notes, directly editing, or deleting them

Exporting Prospects to Excel

From the Prospects page you can export all of your prospects and, with the use of Tags, you can sort your data to run reports specific to the criteria you are seeking.

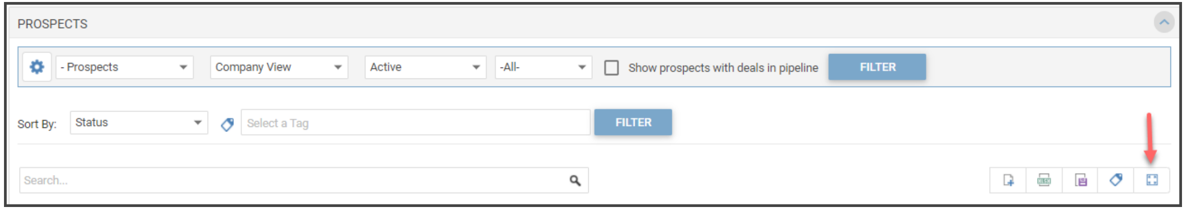


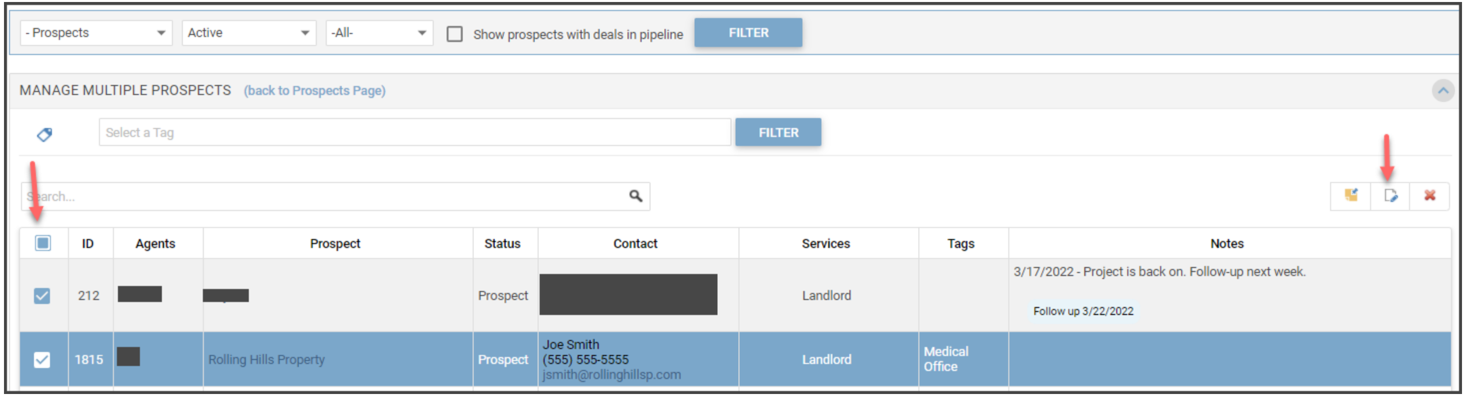


Date Updated	Updated By	Prospects	Address	Size	Client	Project	Status	Notes	Contact/Broker	Phone	Email	Tags
01/08/2021	[illegible]	[illegible]	[illegible]	12,000	Tim's Tree Service		Prospect	Called today, no answer.	[illegible]	[illegible]	[illegible]	10,000+
12/01/2020	[illegible]	[illegible]	[illegible]		The Bakery on Main		Inquiry	Sent the new flyer	[illegible]		[illegible]	10,000+
12/01/2020	[illegible]	[illegible]	[illegible]		Pinkie's Nail Salon		Inquiry	Sent out e-blast	[illegible]		[illegible]	10,000+

Updating Multiple Prospects

To update prospects, select the "Manage Prospects" icon. Search and click the prospect or prospects you wish to update and select edit . This will take you to "Edit Checked Prospects".

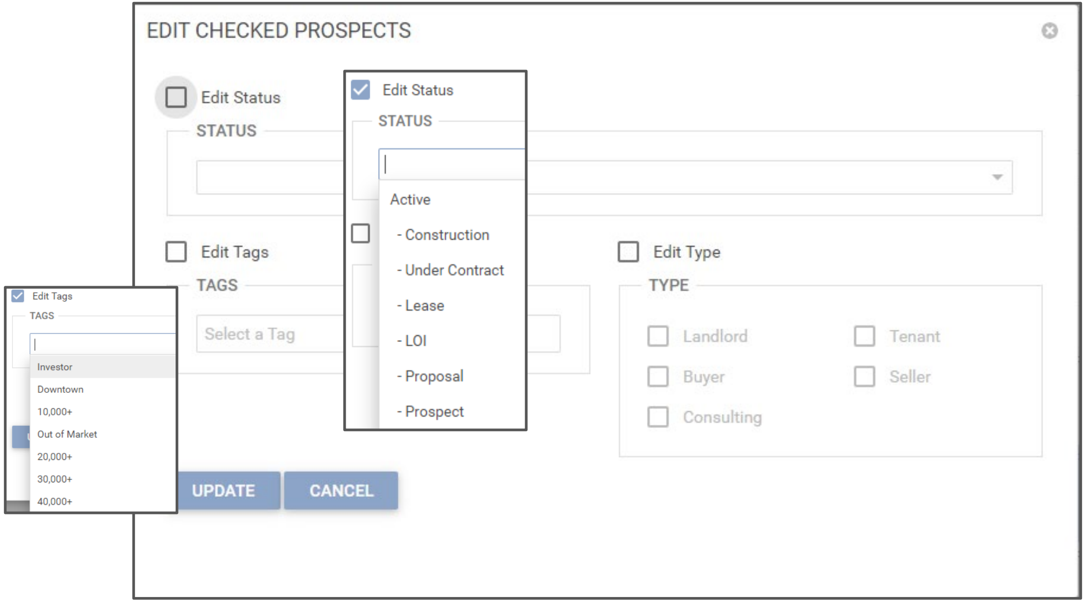




Editing Multiple Prospects

The Edit Checked Prospects page also allows you to make edits and updates to Status, Tags and Type to multiple prospects at one time.

When you have made your edits, click update for these changes to populate.



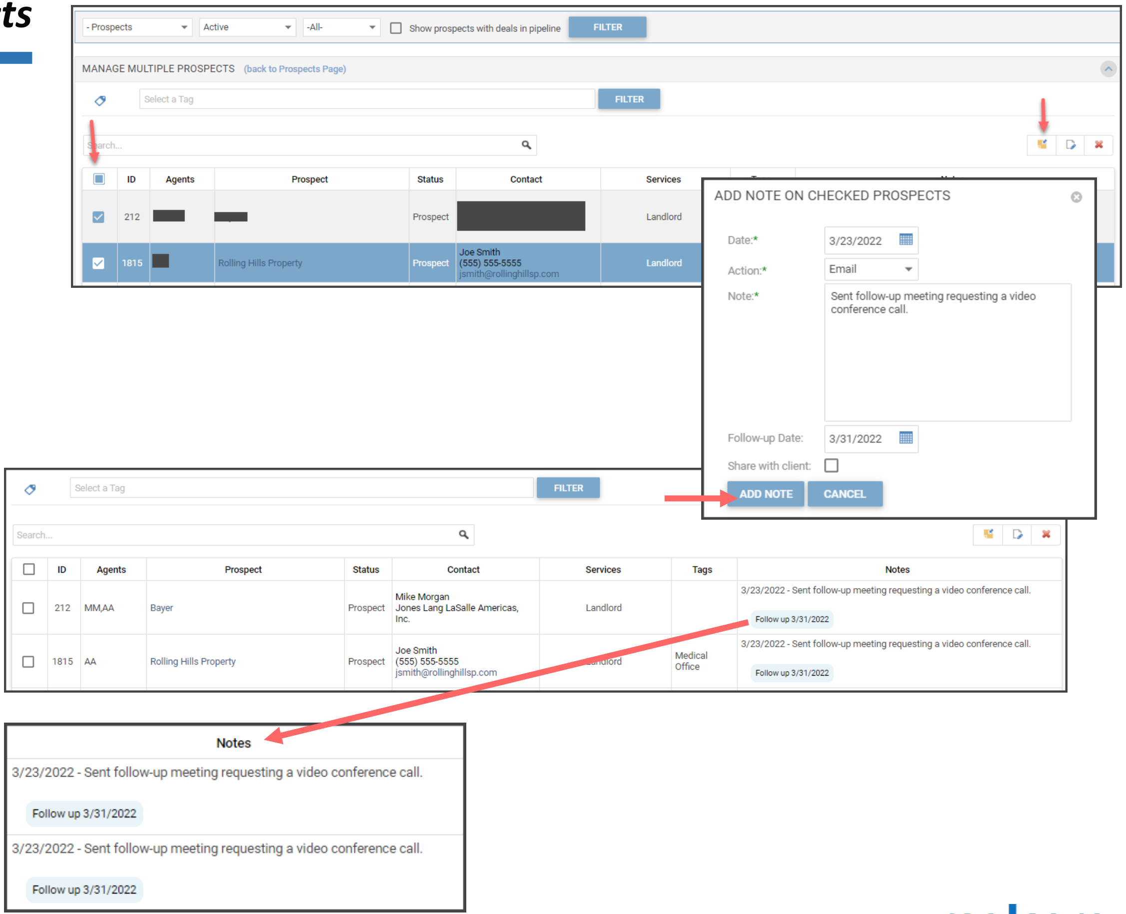
Note: Type and Status are system settings, but you can customize your tags (categories) and apply these to multiple prospects at once.

Add a Note to Multiple Prospects

To add a "Note" to multiple prospects:

- Select your prospects
- Click on the Note icon
- Add your note and click "Add Note" to save it

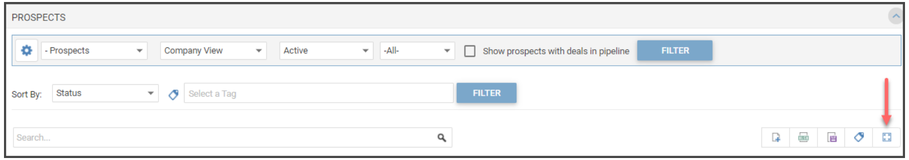
When the screen refreshes it will take you back to the Prospects page where you can see that your notes have been applied to the selected group of prospects.

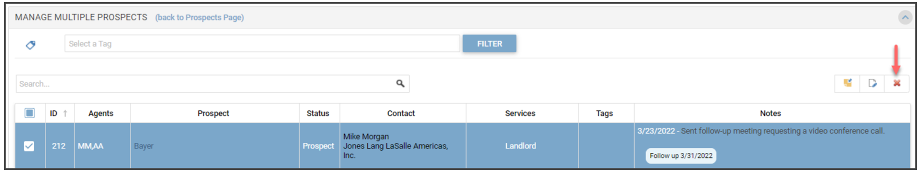


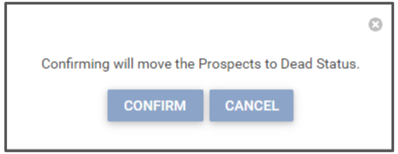
Delete Multiple Prospects

To delete multiple prospects at one time:

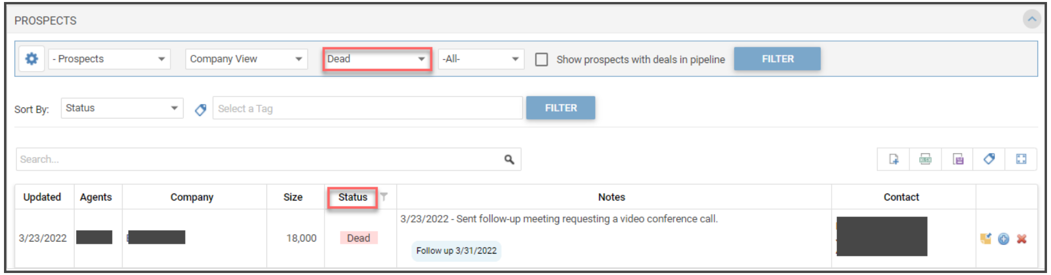
- Click the Manage Prospects icon on the Prospects page
- Select the prospects to delete
- Click the to delete
- A message will pop up to confirm that you want to move the selected prospects to "Dead" status

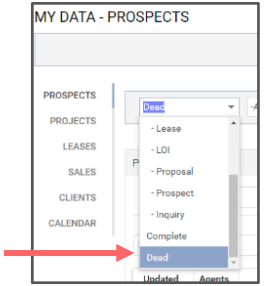






Keep in mind that deleted prospects can be found and restored by using the filter feature, filter to "dead" and the dead prospects will populate.





Tags Explained

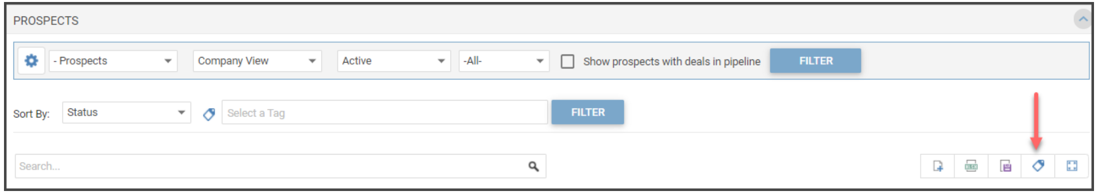
Use tags to categorize your prospects.

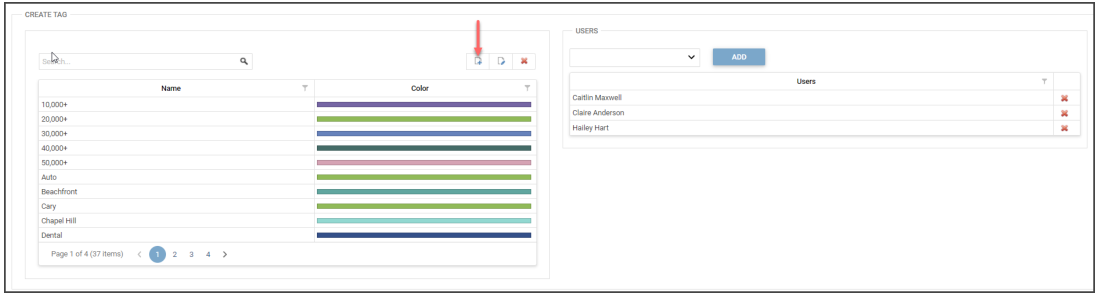
Your can add tags to prospects from the My Data – Prospects screen. To add a new prospect tag, click on the Tag icon on the right side of the page.

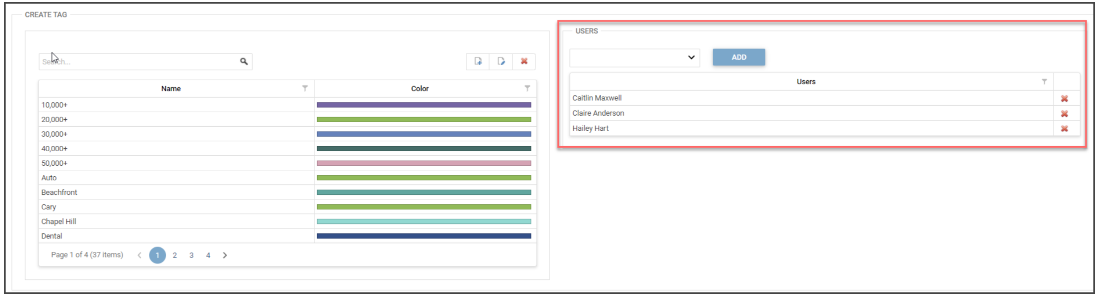
You will be taken to the “Create Tag” screen. Click on the + icon on the right side of the screen to create a new tag.

Click in the “Name” section to create the name of the tag. In the next column, you can choose a color of the tag to help categorize.

You can also share your tags with other Realcore users. Simply find their name and click “Add”. Any user added to your tags will be able to mark Prospects with your tags.



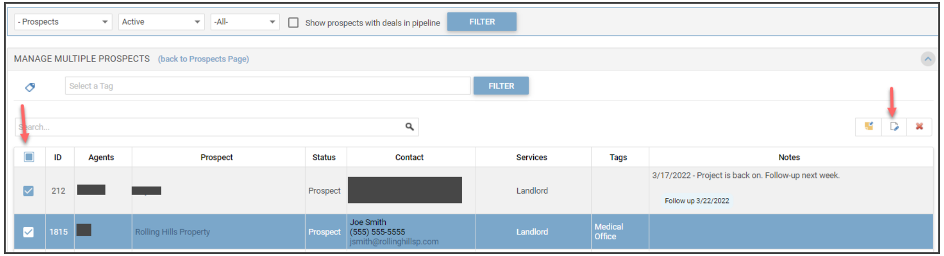




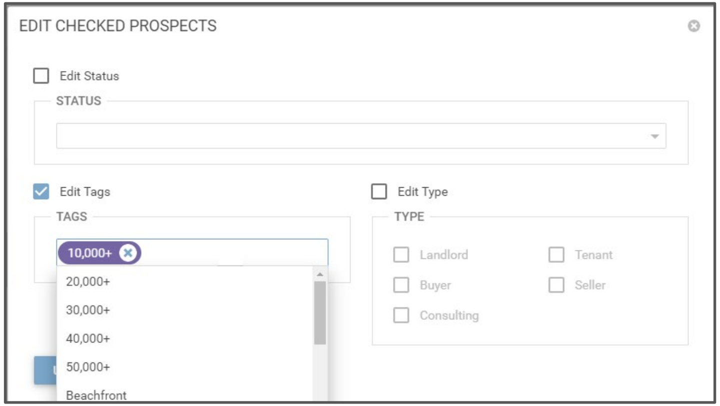
Tagging Multiple Prospects

With the new tags saved, you can now tag prospects not only when they are created, but also existing prospects. Using the Manage Prospects icon you can select multiple existing companies to add your new tags.

Check the companies you would like to add the new tags, and then click the Edit icon.



Check the “Edit Tags” box and type in the tag to apply to the previous checked prospects. Click the “Update” button on the screen and those prospects will be updated with the tags.



Tip: Several tags have been saved in the illustration as an example to show how tags can help simplify Excel exports with specific criteria. You can always add multiple tags to a single company.

Need additional assistance?

Please email us: Support@realcoreapps.com

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