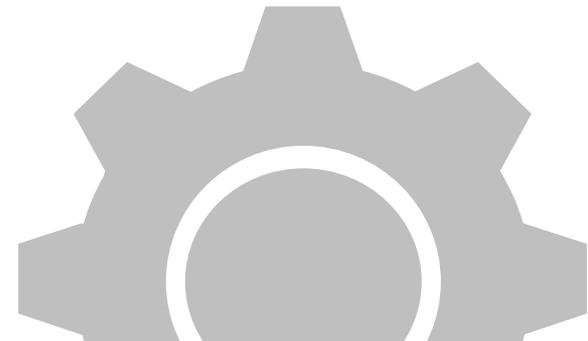




THE COMPLETE PROSPECTING GUIDE

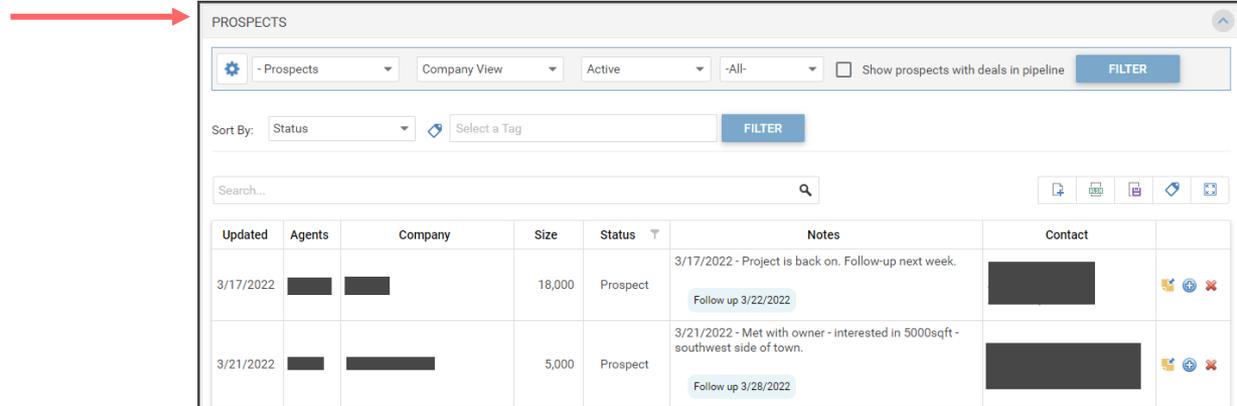
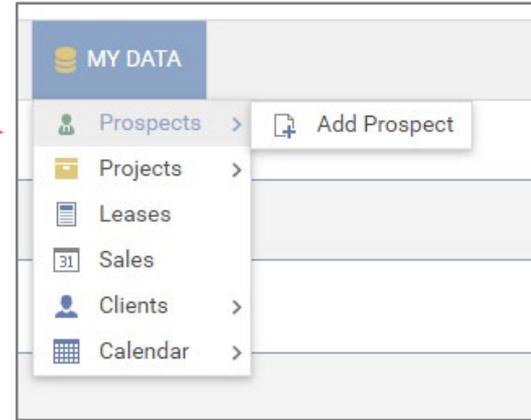
A Better Way To Run Your Brokerage Business.



Accessing Your Prospects

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

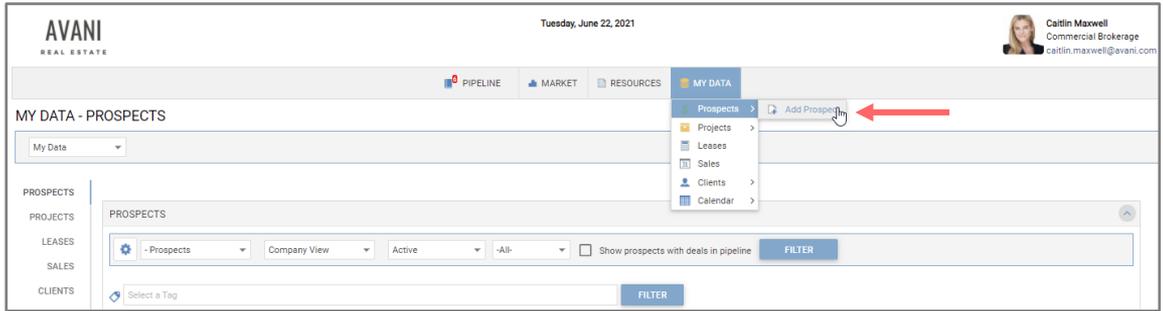
Your Prospects will appear on the screen. This is where you can search and filter your own Prospects.



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.



The screenshot shows the 'Add Prospect' form. It is divided into several sections:

- COMPANY INFORMATION:** Includes a dropdown for '- Prospect' (1) and a text field for 'Rolling Hills Property'.
- Information:** A text area for additional information.
- PRIMARY CONTACT:** Fields for Name (Joe Smith), Phone, and Mobile (j.smith@rollinghillsp.com).
- COMPANY:** Fields for Address (123 Main Street), City (Any Town), State (North Carolina), Country (United States), and ZIP Code (29154). It also includes a 'Size' field (15,000.00) and 'Types' checkboxes (Landlord, Tenant, Buyer, Seller, Consulting) (1).
- Medical Office:** A dropdown menu with 'Medical Office' selected (4).
- AGENTS:** A section for 'YOUR TEAM' with 'Internal Agents' (Aston Anderson) and 'Region' (Raleigh/Durham).
- EXTERNAL (IS THIS COMPANY REPRESENTED?):** A search field.
- CONNECT TO CLIENT:** A section with 'Client' and 'Projects' dropdowns and a 'CONNECT TO CLIENT' button.
- PROPERTY:** A section with a search field and an 'Add' button (3).
- Buttons:** 'SAVE' and 'CANCEL' buttons at the bottom (5).

Filters & Icons

The screenshot shows the PROSPECTS screen with the following filters and table data:

Filters:

- 1. Settings icon
- 2. Prospect dropdown
- 3. Company View dropdown
- 4. Active dropdown
- 5. All dropdown

Table:

Updated	Agents	Company	Size	Status	Notes	Contact
3/17/2022	[Redacted]	[Redacted]	18,000	Prospect	022 - Project is back on. Follow-up next week.	[Redacted]

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

Filters & Icons

The screenshot shows the 'PROSPECTS' interface. At the top, there are several filters: '- Prospects', 'Company View', 'Active', and '-All-'. A 'FILTER' button is next to these. Below this, there is a 'Sort By:' dropdown menu with 'Status' selected, and a search bar with 'Medical Office' entered. A 'FILTER' button is also next to the search bar. On the right side, there are several icons: a plus sign, a document with a plus sign, a document with a minus sign, a tag, and a plus sign. A table below shows a list of prospects with columns for 'Updated', 'Note Date', 'Date Added', 'Company', 'Size', 'Status', 'Notes', and 'Contact'. The first row shows a prospect with a size of 18,000 and a status of 'Prospect'. The notes for this prospect are '3/17/2022 - Project is back on. Follow-up next week.' and 'Follow up 3/22/2022'. The contact information is redacted.

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.

PROSPECTS

 - Prospects Company View Active -All- Show prospects with deals in pipeline **FILTER**

Sort By: Status  Select a Tag **FILTER**

Search... 

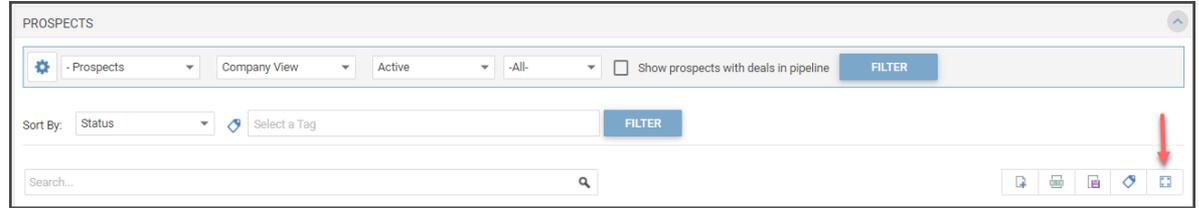
    

Date Updated	Updated By	Prospects	Address	Size	Client	Project	Status	Notes	Contact/Broker	Phone	Email	Tags
01/08/2021				12,000	Tim's Tree Service		Prospect	Called today, no answer.				10,000+
12/01/2020					The Bakery on Main		Inquiry	Sent the new flyer				10,000+
12/01/2020					Pinkie's Nail Salon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

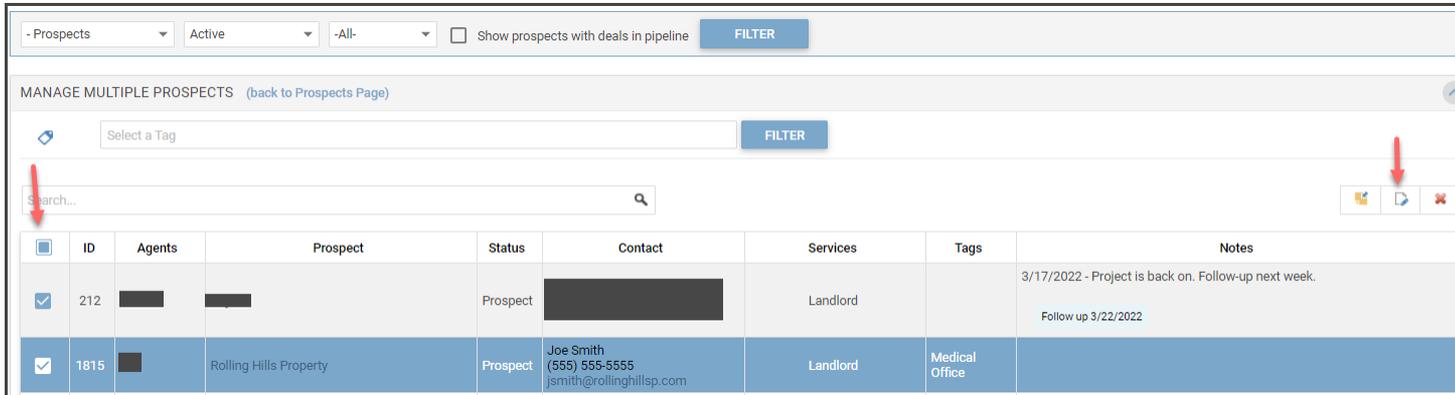
Updating Multiple Prospects

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”.



The screenshot shows the 'PROSPECTS' management interface. At the top, there are several dropdown menus: '- Prospects', 'Company View', 'Active', and '-All-'. To the right of these is a checkbox labeled 'Show prospects with deals in pipeline' and a blue 'FILTER' button. Below this, there is a 'Sort By:' dropdown set to 'Status' and a 'Select a Tag' input field with another blue 'FILTER' button. A search bar with a magnifying glass icon is located below the sorting options. On the right side of the interface, there is a toolbar with icons for adding, deleting, and editing. A red arrow points to the edit icon in this toolbar.



The screenshot shows the 'MANAGE MULTIPLE PROSPECTS' interface. At the top, there are dropdown menus for '- Prospects', 'Active', and '-All-', along with a checkbox for 'Show prospects with deals in pipeline' and a blue 'FILTER' button. Below this is a 'Select a Tag' input field with a blue 'FILTER' button. A search bar is present with a magnifying glass icon. A toolbar on the right contains icons for adding, deleting, and editing. A red arrow points to the edit icon. Below the toolbar is a table with the following data:

	ID	Agents	Prospect	Status	Contact	Services	Tags	Notes
<input checked="" type="checkbox"/>	212	[REDACTED]	[REDACTED]	Prospect	[REDACTED]	Landlord		3/17/2022 - Project is back on. Follow-up next week. Follow up 3/22/2022
<input checked="" type="checkbox"/>	1815	[REDACTED]	Rolling Hills Property	Prospect	Joe Smith (555) 555-5555 jsmith@rollinghillssp.com	Landlord	Medical Office	

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.

The screenshot displays the 'EDIT CHECKED PROSPECTS' interface. It features three main sections for editing: 'Edit Status', 'Edit Tags', and 'Edit Type'. The 'Edit Status' section is active, showing a dropdown menu with options: Active, - Construction, - Under Contract, - Lease, - LOI, - Proposal, and - Prospect. The 'Edit Tags' section is also active, showing a dropdown menu with options: Investor, Downtown, 10,000+, Out of Market, 20,000+, 30,000+, and 40,000+. The 'Edit Type' section is inactive, showing checkboxes for Landlord, Tenant, Buyer, Seller, and Consulting. At the bottom, there are 'UPDATE' and 'CANCEL' buttons.

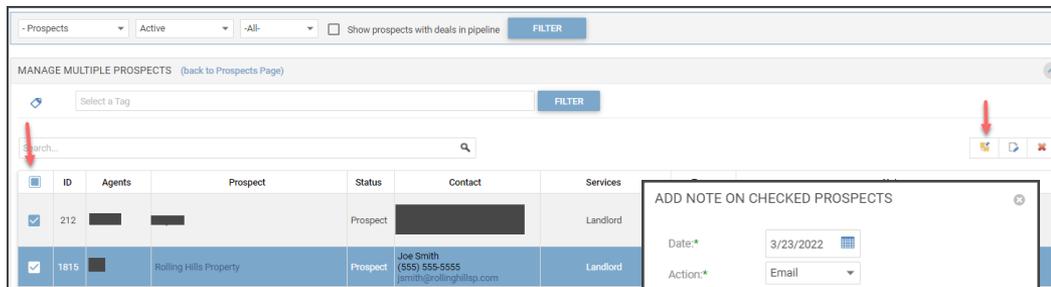
Note: Type and Status are system settings, but you can customize your tags (categories) and apply these to multiple prospects at once.

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.



MANAGE MULTIPLE PROSPECTS (back to Prospects Page)

Select a Tag FILTER

Search...

ID	Agents	Prospect	Status	Contact	Services
212			Prospect		Landlord
1815		Rolling Hills Property	Prospect	Joe Smith (555) 555-5555 jsmith@rollinghillsp.com	Landlord

ADD NOTE ON CHECKED PROSPECTS

Date:* 3/23/2022

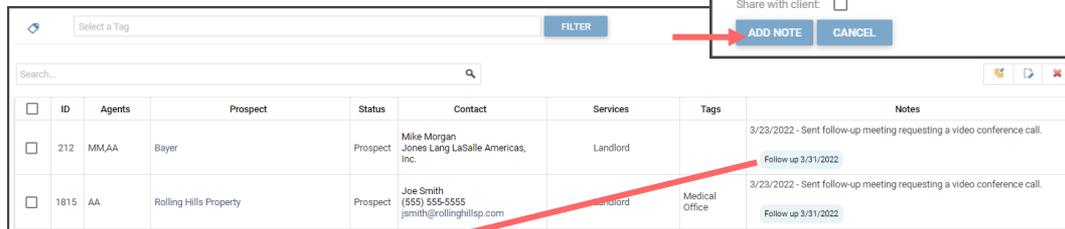
Action:* Email

Note:* Sent follow-up meeting requesting a video conference call.

Follow-up Date: 3/31/2022

Share with client:

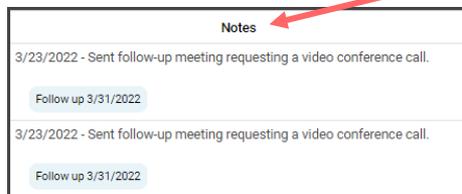
ADD NOTE CANCEL



Select a Tag FILTER

Search...

ID	Agents	Prospect	Status	Contact	Services	Tags	Notes
212	MM,AA	Bayer	Prospect	Mike Morgan Jones Lang LaSalle Americas, Inc.	Landlord		3/23/2022 - Sent follow-up meeting requesting a video conference call. Follow up 3/31/2022
1815	AA	Rolling Hills Property	Prospect	Joe Smith (555) 555-5555 jsmith@rollinghillsp.com	Landlord	Medical Office	3/23/2022 - Sent follow-up meeting requesting a video conference call. Follow up 3/31/2022



Notes

3/23/2022 - Sent follow-up meeting requesting a video conference call.
Follow up 3/31/2022

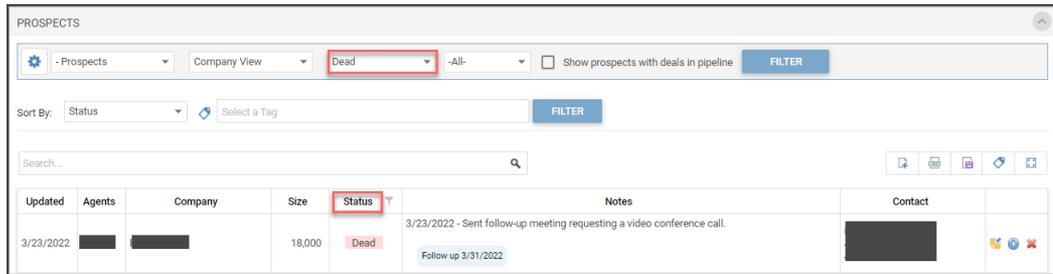
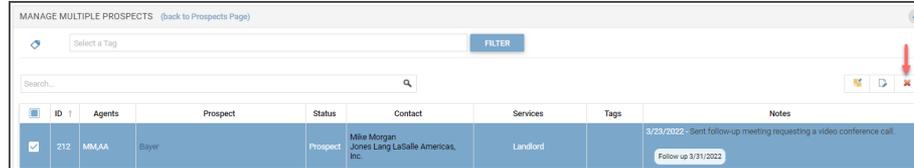
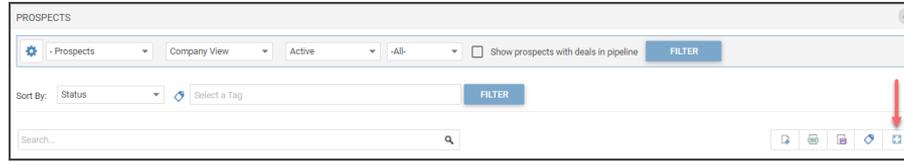
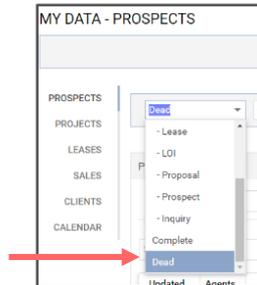
3/23/2022 - Sent follow-up meeting requesting a video conference call.
Follow up 3/31/2022

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

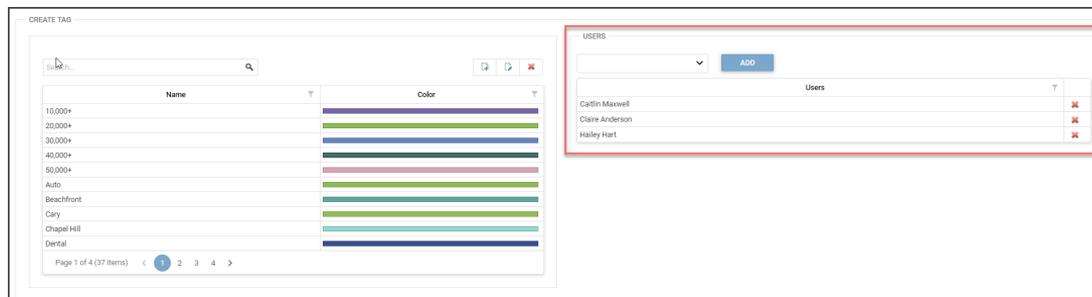
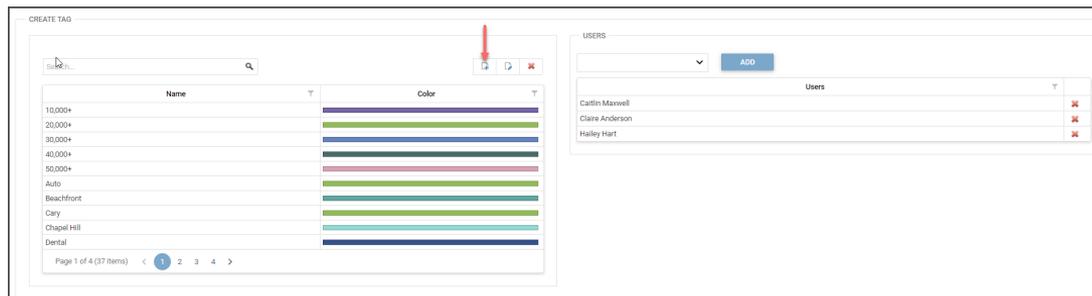
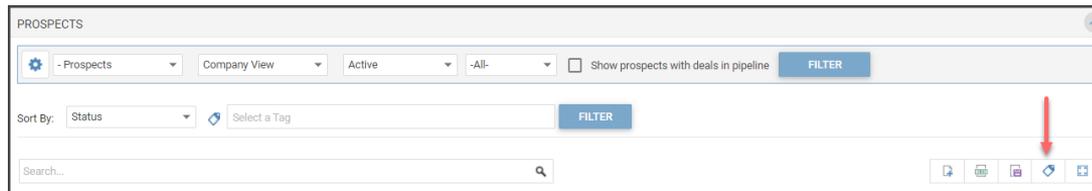
Use tags to categorize your prospects.

You 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.

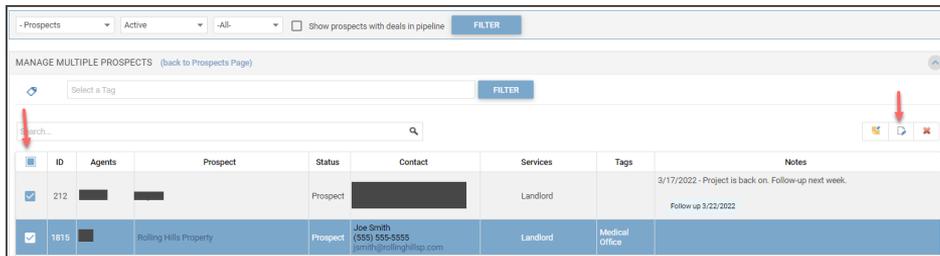
You can also share your tags with other Realcore users. Simply find their name and click “Add”. Any user added to your tags will be able to mark Prospects with your tags.



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. 

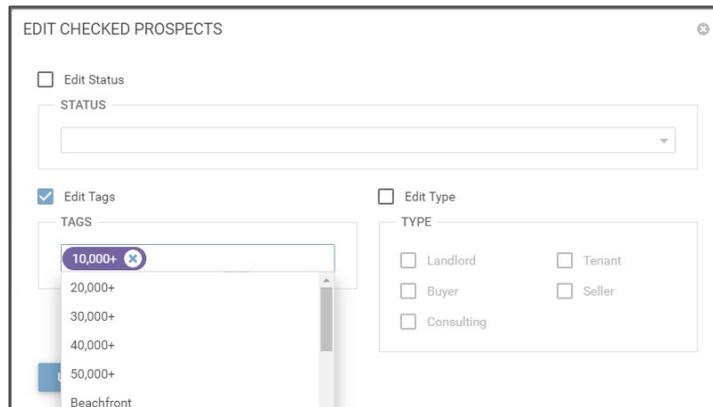


The screenshot shows the 'MANAGE MULTIPLE PROSPECTS' interface. At the top, there are filters for '-Prospects', 'Active', and '-All-'. Below that is a search bar and a 'FILTER' button. The main area contains a table with the following data:

ID	Agents	Prospect	Status	Contact	Services	Tags	Notes
212	[Redacted]	[Redacted]	Prospect	[Redacted]	Landlord		3/17/2022 - Project is back on. Follow-up next week. Follow up 3/22/2022
1815	[Redacted]	Rolling Hills Property	Prospect	Joe Smith (555) 555-5555 j.smith@rollinghills.com	Landlord	Medical Office	

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.



The screenshot shows the 'EDIT CHECKED PROSPECTS' interface. It has a form with the following fields:

- Edit Status
- STATUS: [Dropdown menu]
- Edit Tags
- TAGS: [List of tags: 10,000+, 20,000+, 30,000+, 40,000+, 50,000+, Beachfront]
- Edit Type
- TYPE: [List of types: Landlord, Tenant, Buyer, Seller, Consulting]



Need additional assistance?

Please email us: Support@realcoreapps.com

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