

Realcomp *Online*® Prospect Tip Sheet

How to Manage Prospects More Efficiently

The Prospect Module in the Realcomp *Online*® system is a powerful tool that can be utilized to help manage your buyers and keep them informed of new and changed on-market properties that match what they are looking for in a home. This sheet contains tips for best using the Prospect Module.

ADDING YOUR PROSPECT'S PHONE NUMBER

When creating a Saved Prospect Search for a client, you may want to include the client's phone number for quick reference. There are two (2) potential places to add a client phone number. Below are descriptions of these locations and the benefits of each:

- a) **Description field** – By adding the client's phone number to the Description field, you have quick access to the phone number by either hovering your mouse over the client name from the Realcomp *Online*® homepage, or by seeing it appear directly next to your client's name in the Description field on the Prospect Manager page.
- b) **Name field** – By adding the client's phone number to the Name field, you will have quick access to the phone number from the Realcomp *Online*® homepage and next to your client's name from the Prospect Manager page. This option also allows you to see the client's phone number on Prospect flyers.

IMPORTANT REMINDER: Do not add the client's phone number to the "Public Name" field. This field displays for Agents performing Reverse Prospect Searches.

1. To add the phone number to either the Description or Name fields, click the Prospect main menu option.
2. Select the Prospect that you would like to add the phone number to (the Prospect will become highlighted) and select the Edit button.
3. You may either enter the phone number in the Description field or in the Name field after the name of the client.
4. By selecting continue, you will have updated the Prospect with your client's phone number.

TEMPORARILY TURNING OFF A PROSPECT E-MAIL

For various reasons (i.e. your client has decided on a house, but the sale hasn't closed yet) you may want to turn off the automatic e-mail option in Prospects, with out deleting the Prospect.

Below are the steps to turn off the e-mail function.

1. Click the Prospect main menu option.
2. Select the appropriate prospect from the Prospect list.
3. Click Edit.
4. Uncheck the Email New Matches button and click Continue.