

Entering a New Agent Through the Contact Module

You can add anyone to the system through the contact module, even if they are an in-house agent or employee. Before entering and in-house agent, be sure you are logged in with office admin, or company admin rights.

- 1 Log in as an administrator.
- 2 Point to Contacts and click New.
- 3 Enter the agent's information.

The screenshot shows the 'New Contact' form with several sections and annotations:

- Name Name:** Includes fields for Salutation, First Name, Middle, Last Name, Known As, and Spouse. An annotation points to the Last Name field: "Enter their friendly name here."
- Address:** Includes fields for Address 1, Address 2, City, and State & Zip.
- Contact Information:** Includes a Primary field with a dropdown menu and an "Add Numbers" button.
- Source/Contact Method:** Includes Status (Active), Source (Agent Mailings), Type (OutSide Agent, Employee, Prospective Rental), and Urgency (A). An annotation points to the Type dropdown: "Be sure to select In-House Agent."
- Assigned Agent:** Includes Assigned to, Office (- Select -), and Company fields. An annotation points to the Assigned to field: "Assign the agent to their sales manager."
- Requested Service Notes:** Includes a Comments text area.
- User Information:** Includes User Name, Password, E-mail, and Web Site fields. An annotation points to the User Name field: "Use the agent's email address for their User Name."
- Save:** A button located at the bottom right of the form.

- 4 After you click Save, you can enter the agent's license number, and other information on the Agent tab.