

Entering a New Call

❶ Click Calls on the menu.

❷ Click New Call.

Call Center Dashboard

First Name: Last Name:
Phone: Address:
 [Advanced Search](#) [New Call](#)

Urgent Lead Related Activities

ActivityId	Date	Time	Type	Subject	Primary Party	Prime
<input type="checkbox"/> 5	10/21/2005	10:27 AM	Agent Call In	Agent call in	Johnathan Doe	(330)

❸ Click the Name link at the top of the screen to search for the caller.

New Call

[Name](#)

Salutation:

First Name:

Last Name:

Spouse:

Contact Information

Primary: Work

<- Select ->

<- Select ->

Email:

Address

Address:

Address Line 2:

City:

State/Zip:

Assigned Agent

Name:

Advanced Contact Search

Contact Type: - Select -

First Name: Contains

Last Name: Contains

Office: - Select -

Company:

Phone Number: () - Ext.

Address:

City:

Email Address:

❹ If the contact is not in the system you should click the Cancel button, this will return their name to the New Call form.

Or

If the person does exist, click the bullet beside their name and their information will be returned to the form, with their assigned agent indicated.

- 5 Check the Source/Contact Method area of the form to make sure the Source and Type of caller are correct.

Source/Contact Method

Contacted By:

Source:

Type:

- 6 If the caller asks about a specific listing, click the Requested Property link to search for it.

New Call

Name

Salutation:

First Name:

Last Name:

Spouse:

Source/Contact Method

Contacted By:

Source:

Type:

Contact Information

Primary:

Requested Property

Address:

MLS#:

Ad Code:

v.showingpointe.com - Lead Search PopUp - Microsoft Internet Explorer

Listing Advanced Search

Street Number:

Street Name:

Listing ID:

Ad Code:

Office:

Agent:

Date Entered:

To:

MLS	Address	City	Listing Price	Property Type	Agent	Office
G392087	315 Copper Ridge Rd	Unknown	1495000	Single Family Home	Ajit Dugal	Rocky Hill

- 7 The listing agent will be suggested as the assigned agent, unless the contact already has an agent.

Contact Information

Primary Work (330) 555-1212 x 201
<- Select ->
<- Select ->
Email: Bill@Clinton.com+51011

Address

Address:
Address Line 2:
City:
State/Zip:

Assigned Agent

Name: Ajit Dugal
Email: ajit.dugal1@century21.com
Primary Office (860) 563-0021
Office: Rocky Hill

Requested Property

Address: 315 Copper Ridge Rd
MLS#: G392087
Ad Code:
Listing Agent: Ajit Dugal
Primary Office (860) 563-0021
Office: Rocky Hill

Requested Service Note

Activity Plan: No Plan
No Plan
10 Minute Follow Up
30 Minute Follow Up
Continued 30 Day Follow Up
Page Agent Alarm

Save And Dash Save And Add Save And View

- 8 Next select the activity plan for this type of call from the drop down list.
- 9 Click Save and Dash to finish entering the call, and return to the dashboard. Once you return to the dashboard you should see any priority activities that have been created for the new call.