

Searching for Contacts, Activities, and Information

A contact is considered to be any record for a person that is added to the ShowingPointe application. There are several different types of contacts however, and the contact type is determined when creating the contact record for that person. Some examples of contact types are as follows: buyer, seller, in-house agent, employee, prospective buyer, prospective seller, leads, etc... There are also different ways to search for each contact type depending on what you are looking for and how much information you have to work with.

The best place to start is the **Global Search** if you know the contact's name or the person's name who is assigned to the contact.

- 1 Enter the Contact's name or the Assigned Contact Name and click GO.

Address:

Name:

Phone:

- Activities ▶
- Calls ▶
- Contacts ▶
- Leads ▶
- Listings ▶
- Offices ▶
- Personnel ▶
- Showings ▶
- Calendar

Enter all or part of the name.

- 2 Your results will display on a page titled Global Search Results and will look similar to this screen shot:

Global Search Results							
Activities:							Ordered by Activity Start Time
<input type="checkbox"/>	Date/Time	Type	Subject	Primary Party	Primary Party Phone	Assigned Agent	Flag
<input type="checkbox"/>	2/20/2006 11:38 AM	Follow Up	30 Minute Follow Up	Allyson Jagars	(Home) (330) 555-7898	Jeffrey Butts	
<input type="checkbox"/>	2/20/2006 4:23 PM	Call	Agent Call In for Lead	Allyson Jagars	(Home) (330) 555-7898	Jeffrey Butts	
<input type="checkbox"/>	2/22/2006 11:08 AM	Follow Up	48 Hour Follow Up	Allyson Jagars	(Home) (330) 555-7898	Jeffrey Butts	
<input type="checkbox"/>	2/22/2006 4:25 PM	Follow Up	48 Hour Follow Up	Allyson Jagars	(Home) (330) 555-7898	Jeffrey Butts	
<input type="checkbox"/>	3/6/2006 11:13 AM	Follow Up	14 Day Follow Up	Allyson Jagars	(Home) (330) 555-7898	Jeffrey Butts	
<input type="checkbox"/>	3/6/2006 4:30 PM	Follow Up	14 Day Follow Up	Allyson Jagars	(Home) (330) 555-7898	Jeffrey Butts	
<input type="checkbox"/>	3/22/2006 11:08 AM	Follow Up	30 Day Follow Up	Allyson Jagars	(Home) (330) 555-7898	Jeffrey Butts	
<input type="checkbox"/>	3/22/2006 4:25 PM	Follow Up	30 Day Follow Up	Allyson Jagars	(Home) (330) 555-7898	Jeffrey Butts	

Contacts:									Ordered by Last Name
Type	Date Entered	Source	Name	Primary Phone	Address	City	Urgency	Agent	
Prospective Buyer	2/20/2006 10:04 AM	Others	Allyson Jagars	(Home) (330) 555-7898			A	Jeffrey Butts	

3 From here you may have obtained the information you required however you can also click on the contacts name anywhere on the screen to view detailed information about the contact record.

General | Notes | Activities | History | Buyer | Follow Up

View Contacts

Name Name

Salutation:

First Name:

Middle Name:

Last Name:

Known As:

Spouse:

Source/Contact

Urgency:

Status:

[Source:](#)

[Type:](#)

4 To view a summary of all the individually listed tab categories click on the Follow Up tab and from there you can view contact information, notes, completed activities, activities coming up, the person who performed activities and notes, and also the currently assigned agent contact information.

General | Notes | Activities | History | Buyer | **Follow Up**

Current Activity

Activity Details

Status: Priority

Date:

From: : :

To: : :

Type:

Subject:

Place:

Notes

Contact

Allyson Jagars
Home: (330) 555-7898

Assigned Agent

Jeff Butts
138 Kenilworth Ave, NE
Warren, Ohio 44483
Home: (330) 299-1052
Cell: (330) 219-6829
Direct Line: (330) 729-3553
jeff@realestatepointe.com

Save and Dash | Save and Add | Save and View | Save Notes

Activity History

Date	Time	Type	Subject	Primary Party	Primary Party Phone	Listing Address	Assigned
<input checked="" type="checkbox"/>	03/03/2006 3/3/2006 3:19 PM	Record	New Call Entered	Allyson Jagars	(330) 555-7898		Jeff Butts
Notes: New Call entered with no plan. Completed by: Beth McCallister							
<input checked="" type="checkbox"/>	03/03/2006 3/3/2006 3:19 PM	Call	New Call	Allyson Jagars	(330) 555-7898		Jeff Butts
Notes: 3/3/2006 8:19:37 PM This is a test contact added to the system so Beth can create her manual Completed by: Beth McCallister							

Future Activities

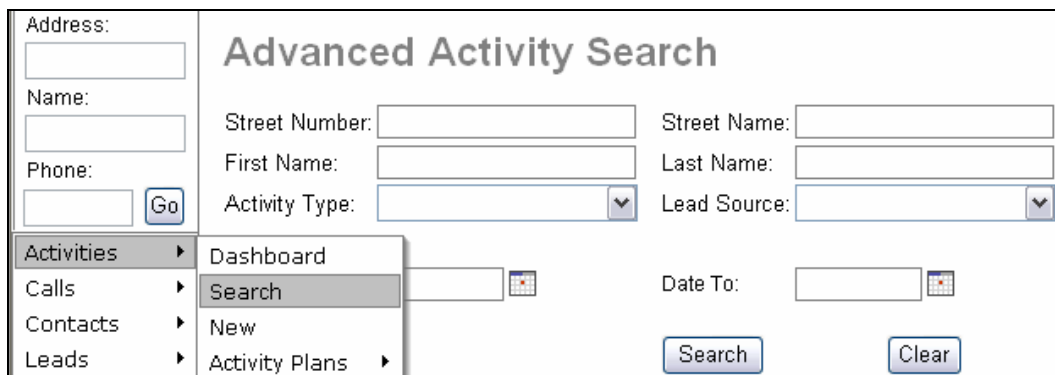
5 A user can also search for all activities that were entered in each module through the Activity Module. There is a quick search located at the top of the dashboard within the module that allows you to search by the most commonly searched for categories.



The screenshot shows the 'Activity Dashboard' search interface. It includes a 'Listing Address' text input field, a 'Contact Name' text input field, and a date range selector with 'Date From' and 'To' fields, each accompanied by a calendar icon. At the bottom, there are three buttons: 'Search', 'Advanced Search' (a blue hyperlink), and 'Clear'.



6 If you need to do a more extensive search for activities then what is allowed on the dashboard you can perform an Advanced Activity Search by clicking on the link under the quick search on the dashboard or by going directly to the Advanced Activity Search from the Module menu on the left as shown.



The screenshot shows the 'Advanced Activity Search' interface. On the left is a navigation menu with 'Activities' selected, showing sub-options: 'Dashboard', 'Search', 'New', and 'Activity Plans'. The main search area contains several input fields: 'Address', 'Name', and 'Phone' (with a 'Go' button); 'Street Number', 'Street Name', 'First Name', and 'Last Name'; 'Activity Type' (a dropdown menu); 'Lead Source' (a dropdown menu); and 'Date To' (with a calendar icon). At the bottom are 'Search' and 'Clear' buttons.

7 The final way to search requires that you know at least enough information to determine which module the entry was made. The individual modules each have both a quick search and an advanced search just like the Activity module. The Call module searches for information entered in the call module, Contacts module searches for information entered in the contact module and etc...