

## Using Search Filters and the Contact Touch Report

Using search filters and the contact touch report provides a way to view all your prospect/contacts and the most recent follow up and future follow up, all in one report. For example, viewing all your HOT prospects for a specific community – here’s a step by step example:

- Navigate to **CONTACTS** > click on **SEARCH FILTERS**

Input the criteria for your contacts and click **SEARCH**:

Advanced Contact Search...
?
Search

Keyword Search:

Created By:

Date Created: From:   To:

Date Modified: From:   To:

Category:  Include Lost/Inactive:

Associated Contacts:

Account Executive:

Company Name:

Contact First Name:

Contact Middle Initial:

Contact Last Name:

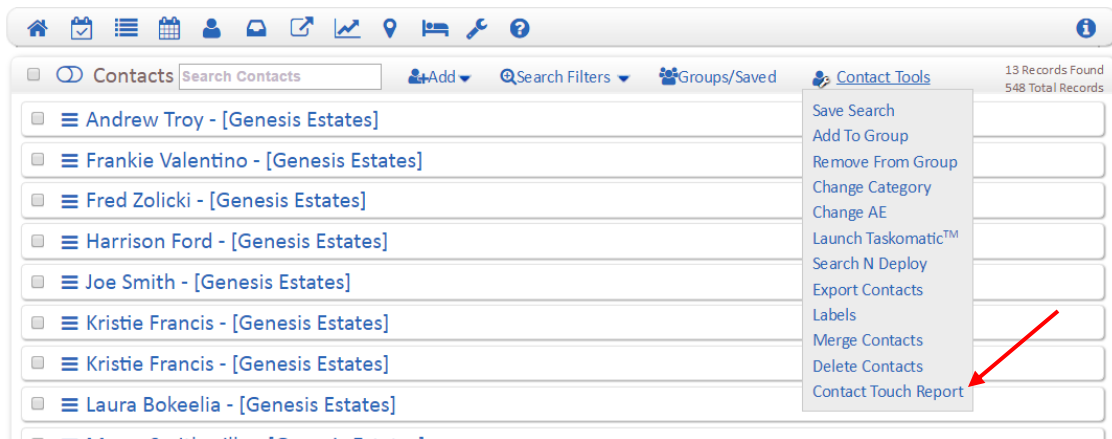
Suffix:

(Example criteria: **Category:** Prospects- **Account Executive:** Kristen Zeh- **Ranking:** Hot)

- You have successfully located your contacts when you see results (a listing of contacts that meet the criteria specified) like this:

Contacts		Search Contacts	Add	Search Filters	Groups/Saved	Contact Tools	13 Records Found 548 Total Records
<input type="checkbox"/>	Andrew Troy - [Genesis Estates]						
<input type="checkbox"/>	Frankie Valentino - [Genesis Estates]						
<input type="checkbox"/>	Fred Zolicki - [Genesis Estates]						
<input type="checkbox"/>	Harrison Ford - [Genesis Estates]						
<input type="checkbox"/>	Joe Smith - [Genesis Estates]						
<input type="checkbox"/>	Kristie Francis - [Genesis Estates]						
<input type="checkbox"/>	Kristie Francis - [Genesis Estates]						
<input type="checkbox"/>	Laura Bokeelia - [Genesis Estates]						

- Now, while viewing the listing of contacts, click on **CONTACT TOOLS > CONTACT TOUCH REPORT**



- The result will be the same list of contacts displayed with additional information. You'll see the dates of the last recorded note, the last recorded task, the last appointment as well as any future tasks and appointments. Use this report to set follow up by clicking on the contact name (on left side), setting an appointment or task for that contact. Then close that tab and refresh this report (F5) to use it as working list, one by one setting up your follow up actions:

#### Contact Touch Report

Contact Name	Location	Last Note	Last Task	Last Appointment	Next Task	Next Appointment	Account Executive
Joe Smith	Genesis Estates	9/20/2016					Kristen Zeh
Andrew Troy	Genesis Estates	10/17/2016			9/8/2016		Kristen Zeh
Frankie Valentino	Genesis Estates	10/18/2016	6/19/2016		4/19/2016		Kristen Zeh
Mary Smythe	Genesis Estates	10/17/2016	9/6/2016		9/13/2016		Kristen Zeh
Harrison Ford	Genesis Estates	10/13/2016			9/22/2016		Kristen Zeh
Nona Yurbuzniz	Genesis Estates						Kristen Zeh
Nona Yurbuzniz	Genesis Estates						Kristen Zeh
Kristie Francis	Genesis Estates	10/18/2016					Kristen Zeh
Kristie Francis	Genesis Estates	10/18/2016					Kristen Zeh
Marcy Smithsville	Genesis Estates						Kristen Zeh
Sue Metz	Genesis Estates	10/20/2016					Kristen Zeh
Fred Zolicki	Genesis Estates						Kristen Zeh
Laura Bokeelia	Genesis Estates						Kristen Zeh