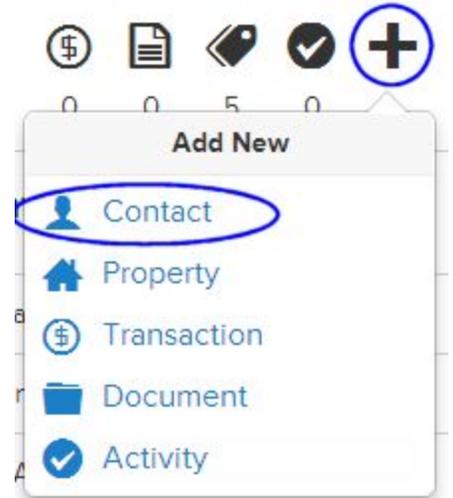


Adding Contacts

Basics: All Users

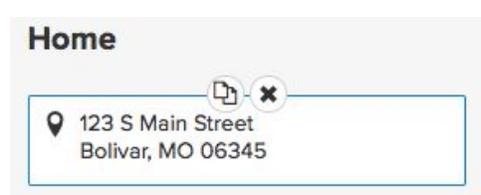
The left side of the screen is called the **List View** because it contains lists of data. There are 7 icons representing the primary sections of the Realvolve system: **Contacts, Properties, Transactions, Documents, Tags, Activities** and the (+) Plus Sign for adding new data.



To add a new contact, click on the (+) sign in the list view, then click on **Contact**. Do the same thing when adding Properties, Transactions, Documents or Activities to the Calendar. This will display the Contact tab of a new contact record in the database. At the top of the screen click into the "FIRST NAME" field and enter the contact's first name. Press the [TAB] key to move to the next field and enter the contact's last name in the "LAST NAME" field. Holding down the [SHIFT]+[TAB] key will move backwards through the list of fields.

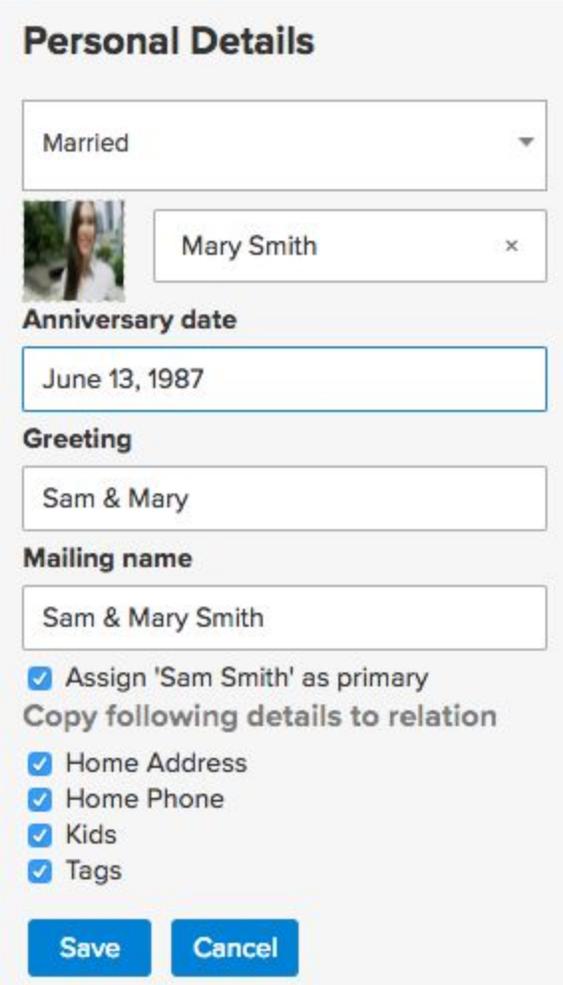
TIP: Notice the small icon on the right of the last name: ⓘ Click on this icon to copy the "dropbox" email address to your clipboard. This is a special email address given to each contact, property, and transaction so that emails received by this address are automatically connected to the record and any attachments to the email are automatically extracted to the Files tab.

The **Contact** tab stores the Home, Work, and Additional information like Address, Mobile Phone, Regular Phone, Fax, Email and Website. Click into the "Add Home Address" field to display the **"Address Details"** showing each part of the address field as separate fields to make data entry more accurate. You only need to enter the street address and zip code. The system will do the rest of the work for you by looking up the City, State, County, and



Country where possible. Press the **Save** button to put the full address into the single address field. Repeat the same process for the Work address or the additional address field as needed.

The right side of the screen is the **Personal Details** section. Click on the (+) plus sign to the right of Relationship status to connect the spouse or significant other. Choose the relationship type and then Enter the name of the contact. If they are in the database already, you can select the contact or you can just press TAB to leave the field and it will automatically add the contact's name into a new contact record and link the two contacts. Enter the Anniversary date when known. The **Greeting** and **Mailing name** fields are used when sending letters and labels to the joint records. Greeting would be "**Sam & Mary**" where the Mailing name will be "**Sam & Mary Smith**". The option to make the current contact the primary will change the order in which those fields are displayed. Below the input fields for this section is a set of check boxes to keep Home Address, Home Phone, Kids, and Tags the same for both contacts, select those as desired. Once the relationship information has been entered, press the **Save** button to complete the process. [SEE VIDEO](#)



The screenshot shows a 'Personal Details' form with the following fields and options:

- Relationship status:** A dropdown menu with 'Married' selected.
- Contact name:** A text input field containing 'Mary Smith' with a small 'x' icon to the right.
- Anniversary date:** A text input field containing 'June 13, 1987'.
- Greeting:** A text input field containing 'Sam & Mary'.
- Mailing name:** A text input field containing 'Sam & Mary Smith'.
- Checkboxes:** A list of checkboxes with the following labels and states:
 - Assign 'Sam Smith' as primary
 - Copy following details to relation
 - Home Address
 - Home Phone
 - Kids
 - Tags
- Buttons:** Two buttons at the bottom: 'Save' (blue) and 'Cancel' (blue).

Enter a **Birth Date** into the system. Realvolve will automatically add a reminder to the calendar. It is treated as a repeating activity so you will be reminded each year.

Home Purchase Anniversary and **Home Sale Anniversary** fields are available to track additional dates for properties that can be used as "milestone dates" for workflows.

Kids names can be entered one-at a-time and then press TAB or ENTER to enter the next name. When you enter a name and you have a connected relationship contact that has the kids names set to copy, then both contacts will show the list of names.

In the **Source Details** section you can keep track of referral information BY and TO other contacts as well as Source of this contact. Knowing source type is important! By keeping track of which sources produced the best results, you will be sure not to waste precious marketing dollars. To link another

contact to this contact as a referral connection, simply type the name of the contact and select them from the list. They are instantly connected for reporting later.

The **Details** section allows you to keep track of communication and contact details. This includes Last Call Date, Last Email Date, Last Personal Visit, and Last Personal Note. We can use these dates for scheduling regular monthly, quarterly, or yearly connections. The Postpone Contact Date prevents contacts from displaying in notifications until the specified date. Additional data fields are available to track other details of the contact.

Three important fields in the details area:

Contact Type: Client, Agent, Farm, Personal, Vendor, Prospect, and Hidden (*Hidden contacts are buyer or seller party members of a transaction which are represented by another real estate agent*).

Stage: Aware, Know, Like, and Trust.

Contact Status: Suspect, Prospect, Lead, Client, and Past Client.

Note: *Assigning Contact Type, Stage and Status determines proper communication and notifications on the dashboard.*

Automation designed by Realvolve can be activated to seamlessly and systematically advance your Contacts from one stage or status to the next. You can activate this feature in Settings >> Automation, and turn on Field Automation. To learn more, check out <http://go.realvolve.com/automation>

Video Training: [CLICK HERE](#)

TIP: *Record Type* is either **Person** or **Company**. When selected as Person, the system will normally show the Home information when displaying this contact in a list or as a party member to a transaction. If it is set to Company, then the Work Address is displayed.

The **Active Contact** status is used to prevent the contact from getting printed, exported or emailed when set to **No**. If you find that a contact is not being contacted you should check this setting and make sure the value is set to **Yes**.

Entering **Connections** is important for keeping up with your contact's social media feeds. The information in the feeds are displayed in the Radar tab of the contact and allows you to get quick information before calling your contact.

If you have any questions, please contact us at: support@realvolve.com

Questions?

Please direct questions and comments to support@realvolve.com.

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