



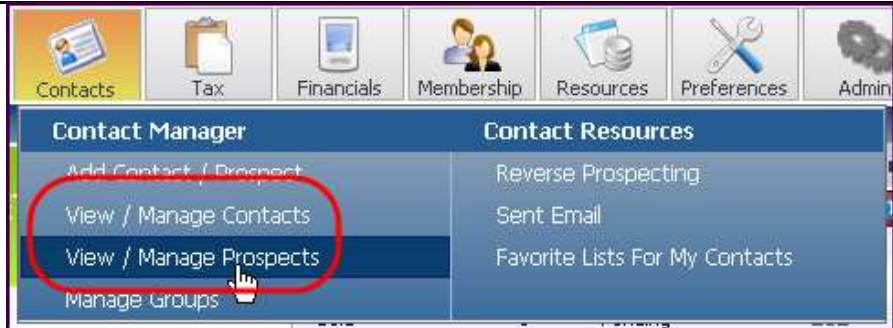
Contact Manager– Viewing Contacts/ Prospects List

Tips and Tricks

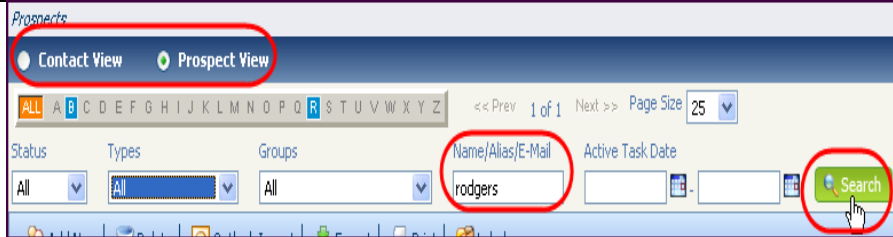
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There are two menu items in the control panel; To View/Contacts and to View/Manage Prospects. Viewing contacts will be everyone in your Contact Manager. A Prospect is just a Contact that has a Saved Search associated with them. View/Manage Prospects will have prospecting listing information available based on the results of their Auto Search. Contacts will have their main contact information readily available.

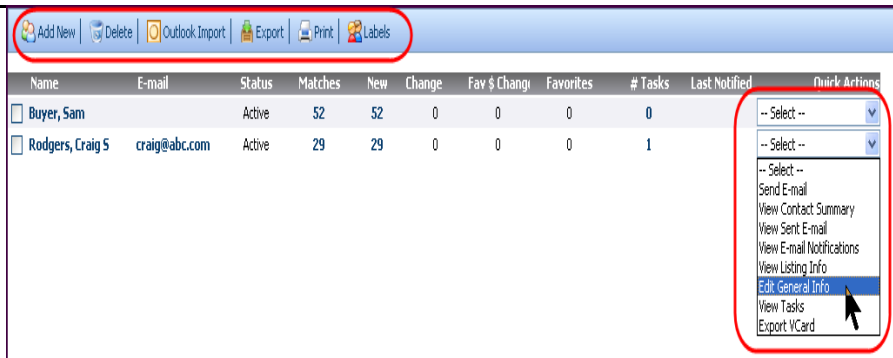
From the control panel in Contacts, click **View/Manage Prospects**.



A lined column spreadsheet of your Prospects will appear in alphabetical order by last name. A search tool with several search criteria fields is available to find someone quickly. In the upper left corner, you can switch from Prospect view to Contact view by clicking Option Button.



The main toolbar lets you add, delete, do an Outlook Import, export contacts, print the spreadsheet, or create mailing labels. The info in the columns are links to show you that information.



The drop down menu on the right are quick actions for that prospect.

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If you have a suggestion or Tips & Tricks, please email mlsinfo@fnis.com or call 877-657-4357.

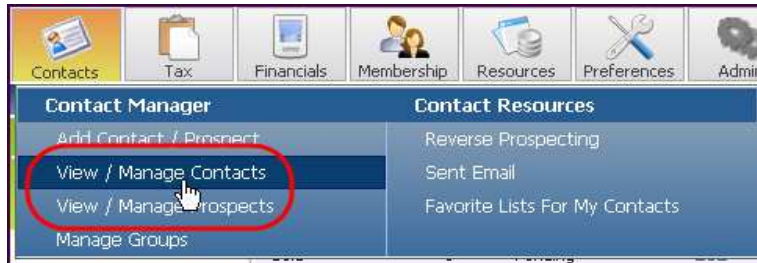


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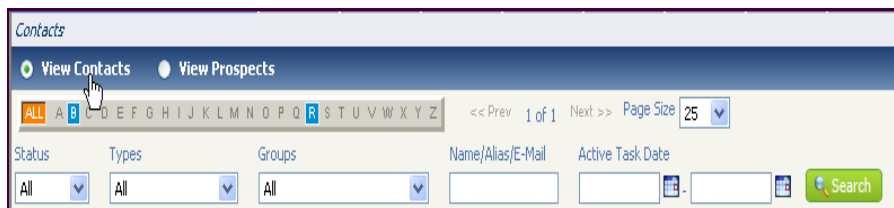
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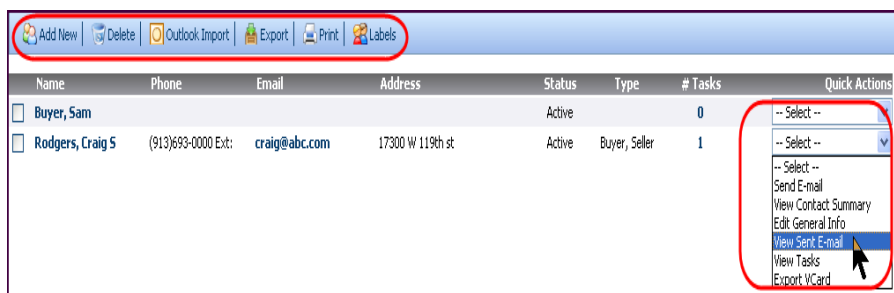
To see the list of contacts, click **View/Manage Contacts**. This will present a similar lined column spreadsheet only it will have main contact information and access.



The same search toolbar will be available. The alphabet bar will highlight the letters of the clients last name. Click a letter to see the clients with that letter as the first in their name.



The main toolbar is the same. The columns for the contacts will have different information in them. Some will be links to get data, or to send an email. The Quick Action drop down remains with contact actions without the listing actions.



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