



Accounts and Contacts

What are accounts? Accounts are the companies we work with on deals. What are contacts? Contacts are the people who work for the companies we work with on deals. At times when we are working with someone that owns a property or wants to buy a property they are part of no company. When that is the situation the individual is both the account and contact.

When you are putting a new individual into the CRM, it is easiest to start with the account(company) information. You will be prompted for this if you are working directly in the leads, opportunities or deal transaction modules. If you are creating a new opportunity or deal transaction, you will be prompted to do a quick create: account. You simply complete the fields and click save and associate.

!3 / 24/tab/Potentials/create?layoutId=280185500000091023

The screenshot shows a CRM interface with a modal dialog box titled "Quick Create: Account". The dialog box contains three input fields: "Account Name", "Phone", and "Website". Below these fields are three buttons: "Cancel", "Save and Associate", and "Save". Red arrows point from the "Save and Associate" button to each of the three input fields, indicating the sequence of actions. The background shows a navigation menu with "Deal Transactions" and "Activities" tabs, and a "Save" button in the top right corner.

If you create an account in the accounts module there is a more complete profile you can complete for the company that includes what type of properties they are looking for, primary contact, etc.

The screenshot shows the 'Create Account' form with the following fields and sections:

- Account Information:**
 - Account Owner: Steven Tomaso
 - Account Name: [Empty]
 - Primary Contact: [Empty]
 - Website: [Empty]
 - Lead Source: -None-
 - Acct Type: None
 - Phone: [Empty]
- Description Information:**
 - Description: [Empty]
- Message from Eform:**
 - Message from Eform: [Empty]

Buttons at the top right: Cancel, Save and New, Save.

Once you have an account created you can now associate a contacts for this company. An example would be IRE Investment would be an account. Steven Tomaso would be a contact. Once an account is created, when you go to enter a contact you can search the account field in the contact form to associate the appropriate account for them. A similar quick create:contact form will be made if you proceed to enter a contact for the first time when you're making an opportunity or deal transaction.


The screenshot shows the 'Quick Create: Contact' modal form with the following fields and sections:

- First Name:** -None- [Dropdown]
- Last Name:** [Empty]
- Title:** [Empty]
- Account Name:** [Empty] (with search icon)
- Contact Type:** None
- Lead Source:** -None- [Dropdown]
- Email:** [Empty]
- Secondary Email:** [Empty]
- Phone:** [Empty]
- Mobile:** [Empty]

Buttons at the bottom: Cancel, Save and Associate, Save.

The contact form in the contacts module is similar to the accounts module where you can complete a much more expansive profile for the contact.

Create Contact [Edit Page Layout](#) Cancel Save and New Save



Contact Information

Contact Owner	Steven Tomaso	Phone	
Contact Type	None	Mobile	
Account Name		Fax	
Service Provider Name		Email	
First Name	-None-	Secondary Email	
Last Name		Email Opt-Out	<input type="checkbox"/>
Title			
Lead Source	-None-		

Description Information

Description

Message from Eform

Message from Eform

Once an account and contact is created in the CRM it can be used over and over again. Many times a number of our clients do multiple deals. So it is wise to search for the contact and account when you are making a new opportunity or deal transaction because it may already be in there! All you need to do is press on the icon in the bar to search.

Create Opportunity [Buyer or Listing Agent](#) [Edit Page Layout](#) Cancel Save and New Save

Opportunity Information

Opportunity Owner	Steven Tomaso	Next Step	
Opportunity Owner 2		Followup Date	MMM D, YYYY 02:00 PM
Opportunity Name		Hot deal	None
Account Name		Initial appt. type	None
Contact Name		Property Sales Price	\$
Contact Role	-None-	Agent Comm %	
Type	-None-	Closing Date	MMM D, YYYY
Lead Source	-None-	Stage	Appointment to be Set
Property		Probability (%)	10

Description Information

Description