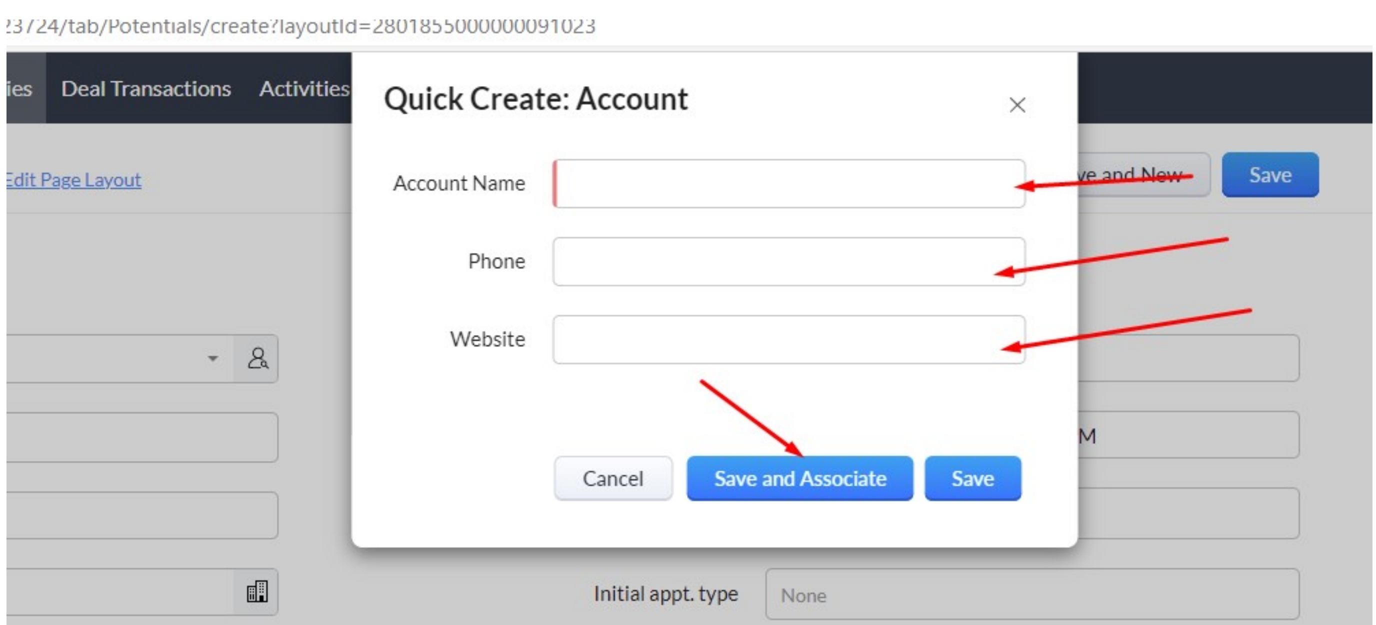
I R E I N V E S T M E N T

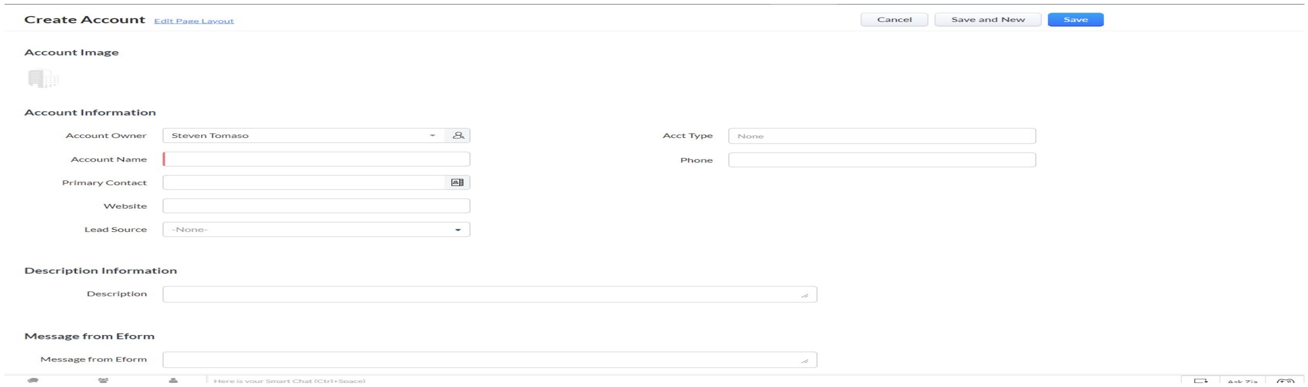
Accounts and Contacts

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.

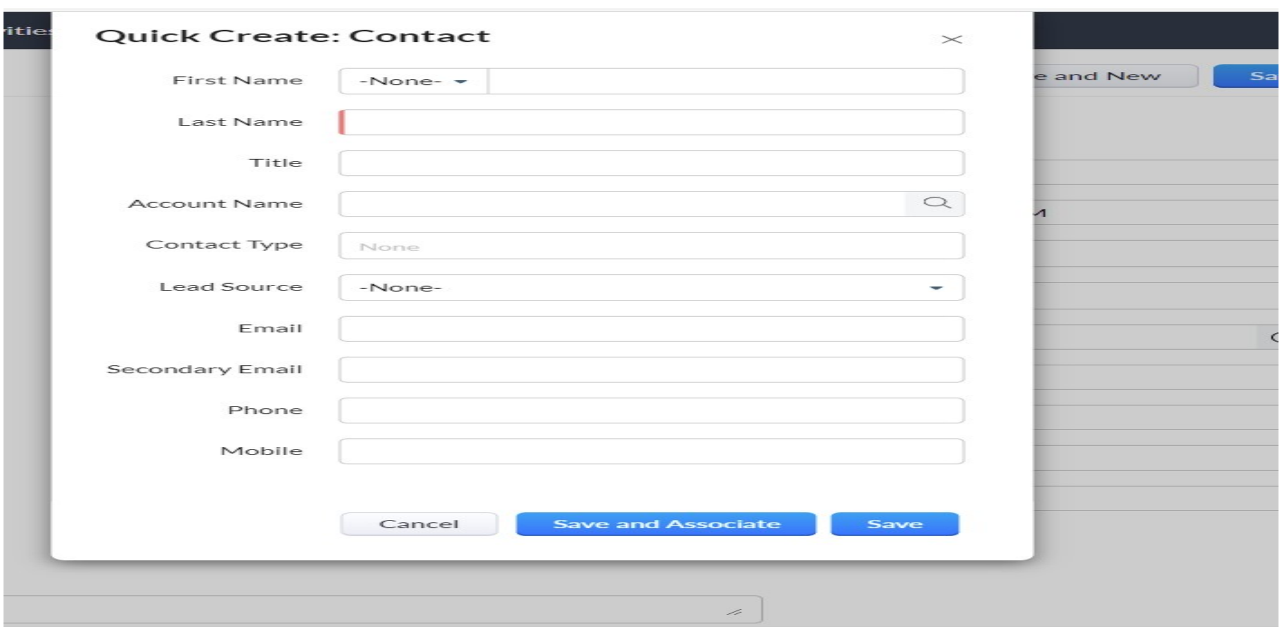
When you are putting a new individual into the CRM, it is easiest to start with the account(company) information. You will be prompted for this if you are working directly in the leads, opportunities or deal transaction modules. If you are creating a new opportunity or deal transaction, you will be prompted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



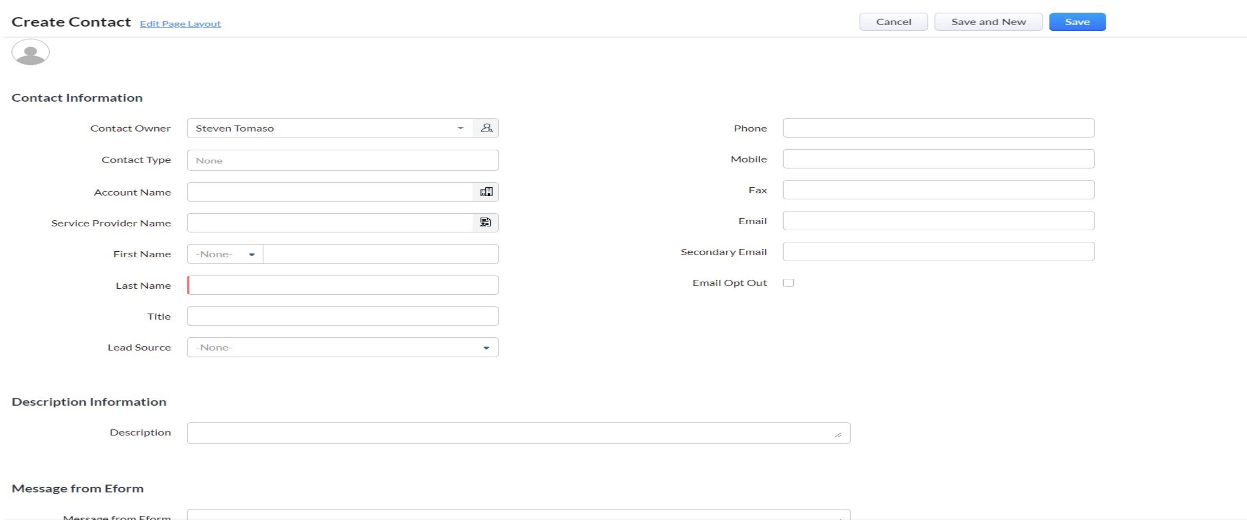
If you create an account in the accounts module there is a more complete profile you can complete for the company that includes what type of properties they are looking for, primary contact, etc.



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



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.