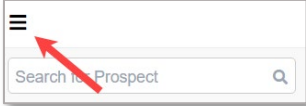
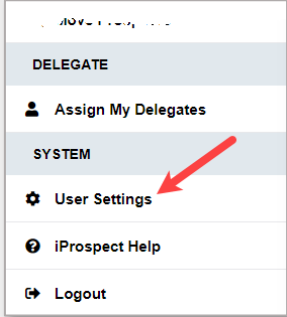
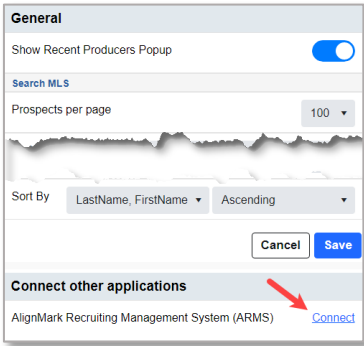
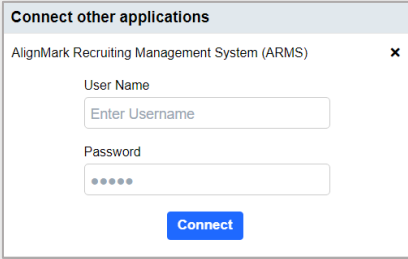
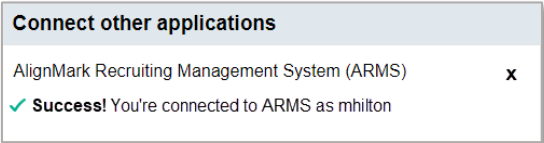



Integration with the Alignmark Recruiting Management System (ARMS) CRM

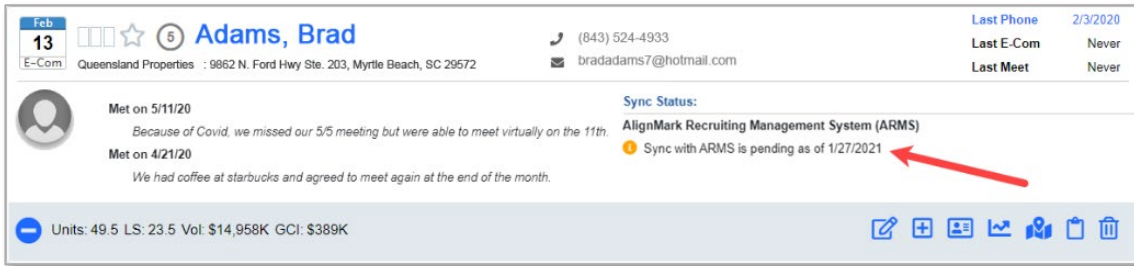
Connecting to the Alignmark CRM allows for information on recruiting prospects to sync between iProspect and Alignmark.



Linking iProspect to ARMS	
<p>1. Click the Menu icon.</p>	
<p>2. From the menu click User Settings.</p>	
<p>3. In the User Settings screen, click Connect in the Connect other applications section.</p>	
<p>4. Enter your ARMS User Name and Password and then click Connect.</p>	
<p>5. When the connection is active, a green checkmark will appear in the window.</p> <p>Note: If the iProspect connection to ARMS needs to be disconnected, that will be done from within ARMS, not iProspect.</p>	

iProspect screens once the ARMS connection is made


View All Prospects Screen (Note: Click the plus/expand sign  to see the sync status.)








- Immediately after the connection, the screen shows the sync is **pending**.



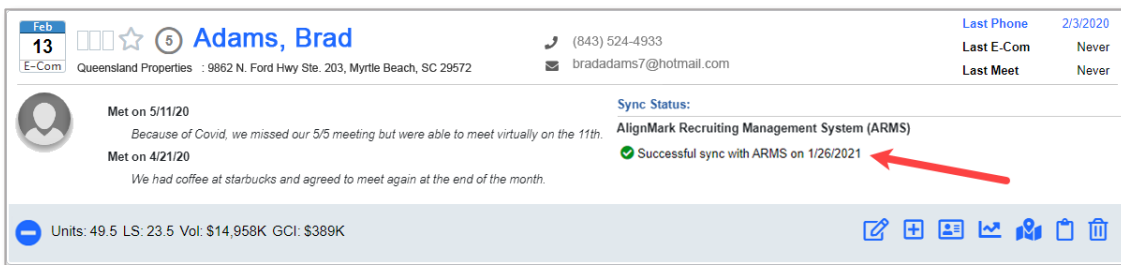
Feb 13   **Adams, Brad** Last Phone 2/3/2020
Last E-Com Never
Last Meet Never



Queensland Properties : 9862 N. Ford Hwy Ste. 203, Myrtle Beach, SC 29572 (843) 524-4933
bradadams7@hotmail.com

Met on 5/11/20 **Sync Status:**
Because of Covid, we missed our 5/5 meeting but were able to meet virtually on the 11th. **AlignMark Recruiting Management System (ARMS)**
Met on 4/21/20  Sync with ARMS is pending as of 1/27/2021
We had coffee at starbucks and agreed to meet again at the end of the month.


Units: 49.5 LS: 23.5 Vol: \$14,958K GCI: \$389K       








- Within 30 minutes, the screen confirms the sync is **successful**.



Feb 13   **Adams, Brad** Last Phone 2/3/2020
Last E-Com Never
Last Meet Never

Queensland Properties : 9862 N. Ford Hwy Ste. 203, Myrtle Beach, SC 29572 (843) 524-4933
bradadams7@hotmail.com

Met on 5/11/20 **Sync Status:**
Because of Covid, we missed our 5/5 meeting but were able to meet virtually on the 11th. **AlignMark Recruiting Management System (ARMS)**
Met on 4/21/20  Successful sync with ARMS on 1/26/2021
We had coffee at starbucks and agreed to meet again at the end of the month.

Units: 49.5 LS: 23.5 Vol: \$14,958K GCI: \$389K       

Profile View

- Immediately after the connection, the screen shows the sync is **pending**.



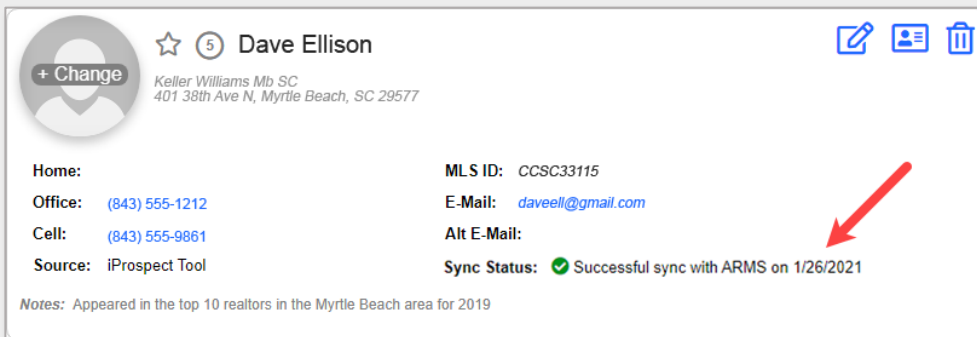
   **Dave Ellison**   






Keller Williams Mb SC
401 38th Ave N, Myrtle Beach, SC 29577

Home: MLS ID: CCSC33115
Office: (843) 555-1212 E-Mail: daveell@gmail.com
Cell: (843) 555-9861 Alt E-Mail:
Source: iProspect Tool **Sync Status:**  Sync with ARMS is pending as of 1/27/2021


Notes: Appeared in the top 10 realtors in the Myrtle Beach area for 2019

- Within 30 minutes, the screen confirms the sync is **successful**.




   **Dave Ellison**   

Keller Williams Mb SC
401 38th Ave N, Myrtle Beach, SC 29577

Home: MLS ID: CCSC33115
Office: (843) 555-1212 E-Mail: daveell@gmail.com
Cell: (843) 555-9861 Alt E-Mail:
Source: iProspect Tool **Sync Status:**  Successful sync with ARMS on 1/26/2021

Notes: Appeared in the top 10 realtors in the Myrtle Beach area for 2019

How ARMS activities show up in iProspect

View All Prospects Screen (Note: Click the plus/expand sign  to see the sync status.)

- Any activity initiated in ARMS will have “(ARMS)” at the start of the activity notes to identify it.



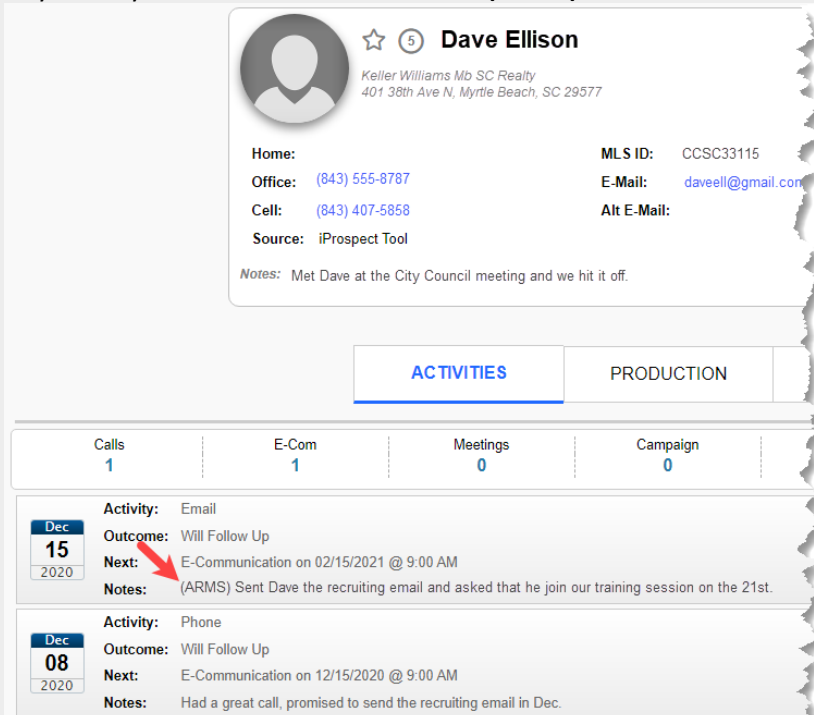
Feb 15 Keller Williams Mb SC Realty : 401 38th Ave N, Myrtle Beach, SC 29577 (843) 555-8777 daveell@gm

Prospect Notes: Met Dave at the City Council meeting and we hit it off.
E-com on 12/15/20
(ARMS) Sent Dave the recruiting email and asked that he join our training session on the 21st.
Phoned on 12/8/20
Had a great call, promised to send the recruiting email in Dec.

Units: 28.0 LS: 9.0 Vol: \$16,270K GCI: \$423K

Profile View

- Any activity initiated in ARMS will have “(ARMS)” at the start of the activity notes to identify it.



Dave Ellison
Keller Williams Mb SC Realty
401 38th Ave N, Myrtle Beach, SC 29577

Home: Office: (843) 555-8787 Cell: (843) 407-5858 Source: iProspect Tool
MLS ID: CCSC33115 E-Mail: daveell@gmail.com Alt E-Mail:

Notes: Met Dave at the City Council meeting and we hit it off.

ACTIVITIES PRODUCTION

Calls	E-Com	Meetings	Campaign
1	1	0	0

Dec 15 2020
Activity: Email
Outcome: Will Follow Up
Next: E-Communication on 02/15/2021 @ 9:00 AM
Notes: (ARMS) Sent Dave the recruiting email and asked that he join our training session on the 21st.

Dec 08 2020
Activity: Phone
Outcome: Will Follow Up
Next: E-Communication on 12/15/2020 @ 9:00 AM
Notes: Had a great call, promised to send the recruiting email in Dec.

Prospect Detail Report

- Any activity initiated in ARMS will have “(ARMS)” at the start of the activity notes to identify it.

Prospect Detail Report

Schenectady, NY from 10/1/2020 to 12/31/2020 (Entry Date Range Type)

Prospecting Activity							
				Activities			
Broker	Added	Date	Sys Date	Type	Outcome	Notes	Status
Williams SC Realty	2/3/2020	12/08/2020	12/08/2020	Email	W	Had a great call, promised to send the r...	N
Williams SC Realty	2/3/2020	12/15/2020	12/15/2020	Phone	W	(ARMS) Sent Dave the recruiting ema...	N
Max Shoreline	2/3/2020	11/10/2020	12/3/2020	Phone	W	Jill agreed to meet me at Rosie's in ea...	N

iProspect Attraction Tool

- Any activity initiated in ARMS will have “(ARMS)” at the start of the activity notes to identify it.

Attraction Tool - 05/06/2021

Demo
0001 - Schenectady, NY

Prospects will not appear when:

- Leading Rating is (5) with no Last Co...
- Lead Rating is (X) for more than 30...
- Date joined is greater than 90 days

Timing

- 0 days or less
- to 60 days
- 1 to 90 days
- to 180 days
- Prospect
- + Affiliating

My Recruiting Goals [Edit](#)

- Additional Company Dollars \$150,000
- Number of Recruits Goal 28
- Top Agents 3
- Experienced Agents 4
- New Agents 21
- Weekly Contacts 8
- Weekly Appointments 4

Am I on Target?

Total Activity	Year	Month	Week
# Contacts Made	6	0	0
# Appts Held	1	0	0
# Agents Joined	0	0	0
# Agents Left	0	0	0
# Total Leads	5		

Agent Name	Current Company	Notes	Rating	Next Steps	Last Contact	Last Appt	Joined	Left
Dave Ellison	Keller Williams	(ARMS) Sent Dave the recruiting email and asked that he join our training session on the 21st.	(4)		02/17/2021	12/16/2020		
Donna Weiskopf	Compass Real Est	I called Donna. We'd like to meet in person if restaurants are open by Feb. Plan to go to Rosie's for lunch on the 12th of Feb.	(4)		01/12/2021			