


Editing a Prospect

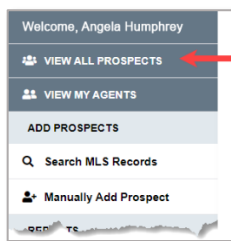
Once you have added a prospect to your dashboard there may be instances in which you need to update information for that prospect. This document covers two ways to edit a prospect:

- **Editing a Prospect from the Dashboard**
- **Editing a Prospect from the Prospect's Profile Page**

Editing a Prospect from the Dashboard

The fastest and easiest way to edit a prospect is from the iProspect dashboard.

- From the menu, choose **View All Prospects**.
- Next, click the **Edit** icon  for the prospect.



The **Edit Prospect** window displays. From here you can edit any of the existing fields or add the following information:

- Source** – Here you identify the source used for finding this prospect. Sources include but are not limited to:
 - iProspect
 - Facebook
 - Company Website
- Prefix** – Select the appropriate salutation.
- Nickname** – Enter a preferred name
- Date Left** – If the prospect was once affiliated with your company but has since left, enter the date they left.

Edit Prospect ✕

<p>Source <input style="width: 90%;" type="text" value="iProspect Tool"/> a</p> <p>Prefix <input style="width: 90%;" type="text" value="None"/> b</p> <p>First <input style="width: 90%;" type="text" value="Dave"/></p> <p>Last <input style="width: 90%;" type="text" value="Ellison"/></p> <p>Nickname <input style="width: 90%;" type="text"/> c</p> <p>Date Left <input style="width: 90%;" type="text"/> d</p>	<p>Broker <input style="width: 90%;" type="text" value="Keller Williams"/></p> <p>Address <input style="width: 90%;" type="text" value="401 38th Ave N"/></p> <p>City <input style="width: 90%;" type="text" value="Myrtle Beach"/></p> <p>State <input style="width: 90%;" type="text" value="South Carolina"/></p> <p>Zip <input style="width: 90%;" type="text" value="29577"/></p>
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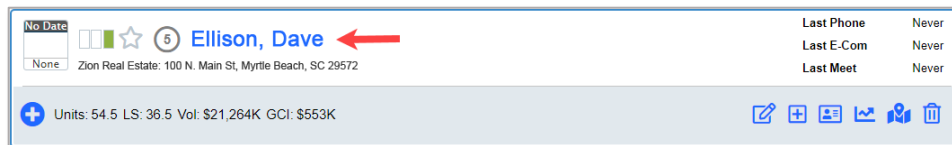
- e. **Email & Alt Email** – Enter/update as needed.
- f. **Referred by** – Enter the name of the individual that referred this prospect if applicable.
- g. **Phone Numbers** – Enter/update Home, Office, or Cell numbers as needed.
- h. **Preferred Contact Number** – Click the circle to designate the preferred contact number if known.
- i. **Prospect Notes** – Enter any general notes that you want to keep top of mind for this prospect. For example, if this prospect was on the Chamber of Commerce or has a special designation you may note it here.
- j. **Save** – Click here to save any changes you’ve made.

The screenshot shows a web form for editing a prospect. The form is divided into several sections:

- Email:** A text input field containing "daveell@gmail.com". A red callout bubble with the letter "e" points to this field.
- Alt. Email:** An empty text input field. A red callout bubble with the letter "e" points to this field.
- Referred By:** An empty text input field. A red callout bubble with the letter "f" points to this field.
- Home:** An empty text input field. A red callout bubble with the letter "g" points to this field.
- Office:** A text input field containing "(843) 555-1212". A red callout bubble with the letter "g" points to this field.
- Cell:** An empty text input field. A red callout bubble with the letter "g" points to this field.
- Pref:** A radio button selection area. The "Home" radio button is selected (indicated by a blue dot). A red callout bubble with the letter "h" points to this area.
- Prospect Notes:** A large text area for notes. A red callout bubble with the letter "i" points to this area.
- Buttons:** At the bottom right, there are three buttons: "Cancel" (grey), "Update from MLS" (white with a border), and "Save" (blue). A red callout bubble with the letter "j" points to the "Save" button.

Editing a Prospect from the Prospect Profile Page

Click on the **Prospect's Name**.



This brings you to the Prospect Profile page. From here you can edit the following:

- **Prospect Status** – Click the star to change the status if needed.
 - New Prospect
 - Interviewed
 - Follow-up



- **Prospect Rating** – The rating reflects the timeframe in which you believe the prospect may affiliate with your company.
 - To update your prospects rating, click the **Rating**. Then click to select the **new rating**.



- **Prospect Photo** – You can upload the prospect's photo so you always have a face with the name.
 - Click the **photo placeholder**.
 - Follow the prompts to locate and open the photo on your computer.
 - Once the file name displays next to the Choose File button, click **Upload Image**.



★ 5 **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	

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

Select an image to upload for this prospect:



Dave E.jpg

- **Prospect information** – to edit any of the information associated with your prospect, click the edit icon .


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