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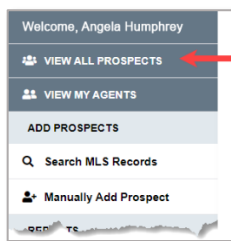
The **Edit Prospect** window displays. From here you can edit any of the existing fields or add the following information:

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

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.

Email

daveell@gmail.com

Alt. Email

Referred By

Home

Pref

Office

(843) 555-1212

Cell

Prospect Notes

Cancel   Update from MLS   Save

Editing a Prospect from the Prospect Profile Page

Click on the **Prospect's Name**.	
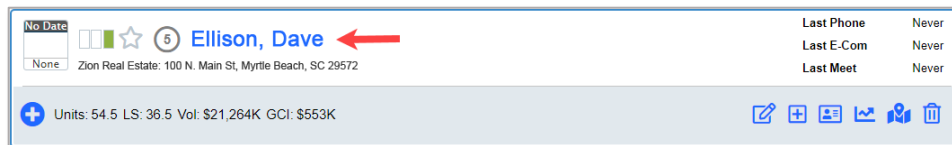
This brings you to the Prospect Profile page. From here you can edit the following:
 	
• **Prospect Status –** Click the star to change the status if needed.
    o New Prospect
    o Interviewed
    o Follow-up	

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

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

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

The Edit a Prospect window appears, from here you can edit the following:

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

Edit Prospect

Source
iProspect Tool   a

Prefix
None   b

First
Dave

Last
Ellison

Nickname
   c

Date Left
   d

Broker
Keller Williams

Address
401 38th Ave N

City
Myrtle Beach

State
South Carolina

Zip
29577

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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 to save any changes you've made.

Email
daveell@gmail.com

Alt. Email
   e

Referred By
   f

Home

Office
(843) 555-1212   g

Cell

Pref
○

● h

○

Prospect Notes
   i

Cancel   Update from MLS   Save   j