PRO GOLD i2

Knowledge Base Article

Article ID: **4177**
Subject: **How to Link a Contact/Prospect Record to a Property**
Last Modified: **May 6, 2008**

Applies to: **Pro Gold i2 3.0, 2.0**

Issue: When a contact/prospect is tracked in Pro Gold i2, the contact/prospect can be linked to a property without having to retype the contact/prospect information. Also, if there is a referral fee attached to the contact/prospect record in Pro Gold i2, the referral fee will be automatically added to the property when the contact/prospect record is linked to the property.

Resolution: Link a Contact/Prospect record to a property

- In the Properties Tab, select the "**Work with Properties**" icon.
- In the "**Property Search**" screen that appears, retrieve the desired property.
    - Use the search options at the top of the screen to select what criteria to use in searching for a property.
    - Type the criteria in the field at the bottom of the "Property Search" screen.
    - Highlight the desired property and click "**Retrieve**".
- Select the "**Buyer/Seller**" tab at the top of the property.
- Next to the "Salutation" field of both the "Buyer Information" and "Seller Information" areas is a binoculars icon. Select the **binoculars** icon next to the side that the contact/prospect will appear as (IE: Buyer **or** Seller).
- The "Contact Search" screen will appear.
- Search for the contact/prospect that will be linked to this property.
    - Use the search options at the top of the screen to search for the contact/prospect by Name, Phone, Address, Email or Contact ID.
    - Highlight the desired contact/prospect record and click "**Retrieve**".
- Pro Gold i2 will ask "Do you wish to replace the current data with the data from the contact record?". Click "**Yes**" to link the contact/prospect to the property.
- The contact/prospect information will be added to the property record.
    - To edit the contact/prospect record, use the "**Hands**" icon next to the binoculars to access the contact record in the Contacts/Prospects Tab.
- Note: If there are referral/lead fees associated with the contact/prospect, they will be added to the deductions list in the "Comm Tree" Tab of the property when "Populate Commission Tree" is selected.

References: Below is a link you can use to access Enhancement HelpNet Center resources, which includes the Knowledge Base Article (KBA) Library, Pro Gold i2 Documentation, and Training Webcasts:

http://secured.progoldi2.com/webcast.aspx

- The Enhancement HelpNet links are located on the right side of the web page.

Related articles: N/A

Keywords: Referral, Commission, Contact, Prospect, Link to Property, Attach, 4177