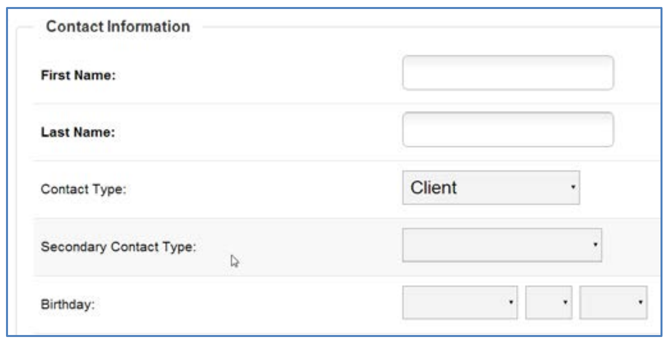
Contacts

Contact is the name we'll be using to talk about everyone from Past Clients to Prequals to Realtors. Contacts cover every kind of person you want to keep up with in ERMA. It is certainly understood that your current clients and referral sources appear in here, but you can use this to keep in touch with anyone you work with. You may want to add contacts like CPAs who sometimes refer you business, or maybe contacts at a bank you work with. There is no limit to the number of contacts you can have in ERMA, so add anyone you think the system can help you develop a closer relationship with!

Adding a Contact

To add a new contact, simply click on the **Add Contact** button on the right. What information is most important will depend on the sort of contact you're adding, and we'll go into greater detail on each kind below.

Once you've clicked **Add Contact** a new screen will come up where you can put in the contact's information. It is always encouraged that you fill in everything you know about the contact, as that information could be useful to you later. At the very least, for ERMA to work properly you need to fill in the following four items.



1. First Name
2. Last Name
3. Email
4. Birthday

If you do not know the birthday you can leave that category blank, but it is possible that you will end up with duplicate contacts in your system if you leave any of those four blank. This is because when information comes into ERMA from Mortgage Builder it looks for those four things to be the same when determining if there are any duplicates.

The second most important thing to make sure you mark is the **Contact Type** and **Secondary Contact Type** which we will cover in detail below. Without this step your contacts will be an unorganized mass of names, but by doing this simple step you will be able to keep everything searchable and organized.

Contacts By Type

Each of the following uses the same profile screen. The only difference between each one is the **Contact Type** selected, and what information is definitely needed for that type.

- **Prospect** – This is the type you will select for pre-quals.
  - Prospects receive monthly **Turnkey Emails** just like clients and past clients do. If you do not want a contact to receive these emails, do not select prospect or client as the type.