Prospecting View

The prospecting view provides a complete snapshot of the selected property.

Save | Follow-Up | Maps | Add Note | Convert to Lead | Convert to Deal | Attach | Send | Print | Deactivate | Delete

[Previous] [Next]

Prospect Summary

investor	Ali	import date	10/04/2007
t.status	Inactive	modified date	06/05/2009
follow-up		list type	Geography 1

Profits

est value $		est repair	
est debt $		est holding	
est equity $		est profit	
est ltv %			

Property Information

* are mandatory fields

name *	John	property type	[Select]
address *		square feet	0
city *		beds	
state *	California	baths	
county			
zip *			
apn			

Contact Information

name	John	phone	
mailing address		work	
city		cell	
state	California	fax	
zip		email	

COPY

Research

borrower	[Select]
property	[Select]
mls	[Select]
bankruptcy	[Select]

Research Completed

bk	
mls	
county	
trustee	
skip traced	
title	
comp-ed	

Loan/Liens

pos	principal	arrears	pre-pay penalty	recorded date	sale date	loan type	notice type
						[Select]	[Select]
						[Select]	[Select]
						[Select]	[Select]
						[Select]	[Select]
						[Select]	[Select]
						[Select]	[Select]
						[Select]	[Select]
						[Select]	[Select]
						[Select]	[Select]
						[Select]	[Select]
total							
total debt							

Property Details

Property Information

property		characteristics		value dates	
owner	John	property type	[Select]	est value	
address		number of units		est dbt	
city		bedrooms		est equity	
state	California	bathrooms		ltv (read only)	
zip code		rooms	0	avg comp	
county		land use		avg per sq ft	
apn/tax id		property style		tax value	
thomascode		stories	0	land value	
lot number		area (sq ft)	0	improved value	
subdivision		lot size		assessed year	0
blocknumber		acres		tax year	
mcm		year built		list price	
tract		garage		sale price	
website 1		garage type	[Select]	list number	
website 2		garage size		list date	
adl info		a/c		date last sold	
purchase amount		pool/spa		last sale price	
purchase date		basement		date since sold	
transfer date		basement type	[Select]	transfer number	
deeded date		times in foreclosure	0	print date	

Contact Information

full name	John
first name	John
mi	
last name	
address	
city	
state	California
zip	
phone	
work phone	
mobile phone	
fax	
company name	
title	
invalid address	
carrier route	

All Loan Information

Loan Information

pos	principal	arrears	pre-pay penalty	recorded date	sale date	lien type	notice type	status
						[Select]	[Select]	[Select]
						[Select]	[Select]	[Select]
						[Select]	[Select]	[Select]
						[Select]	[Select]	[Select]
						[Select]	[Select]	[Select]
						[Select]	[Select]	[Select]
						[Select]	[Select]	[Select]
						[Select]	[Select]	[Select]
						[Select]	[Select]	[Select]
						[Select]	[Select]	[Select]

Bankruptcy Information

Bankruptcy Information

bankruptcy info		trustee info		attorney info	
bankruptcy type	[Select]	trustee name		attorney name	
file date		trustee phone		attorney firm	
discharge date		trustee address		attorney phone	
case number		trustee city		attorney fax	
declared market value		trustee state	[SELECT]	attorney address	
judge		trustee zip		attorney city	
341 date				attorney state	[SELECT]
341 location				attorney zip	

Marketing

Total Touchpoints to John A Cortez

campaign name	type	piece	serial #	date	conv. touchpoint
SF Geography Campaign	Send to Mailhouse		aq	10/09/2007	
SF Geography Campaign	Send to Mailhouse		at	11/08/2007	
SF Geography Campaign	Send to Mailhouse		av	12/08/2007	
SF Geography Campaign	Send to Mailhouse		ax	01/07/2008	

Contacts

Contact Spreadsheet

Owner	BorrowerFirstName	BorrowerMiddleInitial	BorrowerLastName	BorrowerMailAddress	BorrowerMailCity	Bor
John	John					CA
John	John					CA

Contact Script

Part 1 - Introduction

"Hi, my name is _ and my boss asked me to follow up with you regarding several packages that were sent to you regarding your house."

"Are you still in the process of refinancing, doing a bank workout or selling your house? Are you still in need of any additional assistance? My

Record your Contact

Status Updates

Targeting	Inactive
borrower	[Select]
property	[Select]
mls	[Select]
bankrupcy	[Select]

		principal	monthly	arrears
estimated value				
loan 1				
loan 2				
loan 3				

owner	John
phone	
work phone	
cell phone	
email	
fax	

follow-up date | contact type: NULL | notes

SAVE | CONVERT TO LEAD

Notes Log

Attachment

Record Details

* Targeting Status > Inactive

Owner> John Property Address> CA - Phone>

Images

'No Property image available'

DELETE IMAGE(S) | DOWNLOAD IMAGE

select an image to upload: Browse... | UPLOAD IMAGE(S)

Documents

DELETE DOCUMENT(S) | DOWNLOAD DOCS

select a file (.doc /.pdf) to upload: Browse... | UPLOAD DOCUMENT(S)

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