**Keller Williams Eugene/Springfield**

**Web Project Proposal**

**Newer Broker Training Contact Tracking System Elements**

1. Homepage which selected staff could access, with links to desired activity:
2. Create a new agent page
3. Select an existing agent page
4. The ability to create individual pages (see item 4) for new agents
5. The ability to access existing pages
6. A fillable page to make notes re: a contact/meeting with a new agent, so that

Staff can all follow the progress of contacts with new/newer agents. It would include fields for:

1. Agent name (Page Header)
2. Date of the contact/meeting
3. Initials of Staff member
4. Notes re: the contact/meeting purpose, and results
5. Next Step to be accomplished
6. Items B through D to be set up as fillable columns
7. Rows/Fields to be set up to allow multiple contacts to be recorded on the agent’s page

The idea would be similar to when a doctor makes notes in the patient’s records at the conclusion of an office appointment, allowing others who need to see the record access to the appointment results.