

Q Search

Dashboard

Contacts

Campaigns

Automation

Reports

Properties

Events

+ Add Contact

+

🕒

💬

⚙️

Contacts

Q Search

View10 items

<input type="checkbox"/>	Full Name	Company	Email	Phone & Type	Lifecycle	Last Contacted
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032 (Mobile)	Prospect	12/02/2013 (Email)
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032 (Mobile)	Prospect	12/01/2013 (Phone)
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032 (Mobile)	Opportunity	10/01/2013 (Email)

Total Count : 100

Page: 3<<1234. .100>>

+ Add Contact

Q Search

Dashboard

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Contacts

Q Search

<input type="checkbox"/>	Full Name	Company	Email	Phone & Type	Lifecycle	Last Co
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032 (Mobile)	Prospect	12/02/2013
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032 (Mobile)	Prospect	12/01/2013 (Phone)
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032 (Mobile)	Opportunity	10/01/2013 (Email)

Total Count : 100

Page: 3 << 1 2 3 4 . . 100 >>

Add Reminder

Add Meeting

Add Note

Add Opportunity

<input checked="" type="checkbox"/>	Grant Taylor SmartTouch	granttaylor@smarttouch.com (512)736-9032 (Mobile)	Lead 25/03/2013 (Email)
<input checked="" type="checkbox"/>	SmartTouch	smarttouchinteractive.com (512)236-3432 (Mobile)	

Dashboard

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Add Contact

Manage Tags

Send Email

Add Action

Add Note

Add Meeting

More

Contacts

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View

10 items

<input type="checkbox"/>	Full Name	Company	Email	Phone & Type	Lifecycle	Last Contacted
<input checked="" type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032 (Mobile)	Prospect	12/02/2013 (Email)
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032 (Mobile)	Prospect	12/01/2013 (Phone)
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032 (Mobile)	Opportunity	10/01/2013 (Email)

Total Count : 100

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Add Action

Add Note

Add Meeting

More ▾

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Add Reminder

Add Meeting

Add Note

Add Opportunity

Contacts

🔍 Search

View 10 items ▾

	Full Name	Company	Email	Phone & Type	Lifecycle	Last Cor
<input checked="" type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032	Prospect	Contacted on A
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032	Prospect	Contacted on Aug 15th 2013
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032	Opportunity	Contacted on Aug 15th 2013

Total Count : 100

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View 10 items ▼

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Q Search

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Send SMS

Add Action

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⚙️

Contacts

	Full Name
<input checked="" type="checkbox"/>	Grant Taylor
<input type="checkbox"/>	Anne joy
<input type="checkbox"/>	Smith

Send SMS

To:

From

"Grant Taylor"<granttaylor@gmail.com> ⚡

Send

Cancel

Q

View

10 items

Last Contacted

Contacted on Aug 15th 2013

Contacted on Aug 15th 2013

Contacted on Aug 15th 2013

Total Count : 100

Page: 8 << 1 2 3 4 . . 100 >>



Send Emails



▼ To:			
Cc:		Bcc:	
Subject			
From	"Grant Taylor"<granttaylor@gmail.com> ▼		▼

Regards,
Grant C. Taylor
M: 512-736-9032

☒ *Send me Copy*

Send

Cancel

Last Contacted	
Contacted on Aug 15th 2013	 
Contacted on Aug 15th 2013	
Contacted on Aug 15th 2013	

Total Count : 100



Page: 8 « (1 2 3 4 . . 100) »

Search

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+ Add Contact

Manage Tags

Send Email

Add Action

Add Note

Add Meeting

More

+

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⚙️

Contacts

	Full Name	Company	
<input checked="" type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouch.com
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouch.com
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouch.com

Total Count : 100

Note Details

B

i

📎

People

A

Groups

Abc group

Abc group

Abc group

Contacts

Allen

Ame

Anne

View 10 items

Contacted

on Aug 15th 2013

on Aug 15th 2013

on Aug 15th 2013

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100

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Send Email

Add Action

Add Note

Add Meeting

More

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⚙️

Contacts

	Full Name	Company	Email
<input checked="" type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteracti
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractiv
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteracti

Total Count : 100

Meeting Details

Set Reminder

31/10/2013

📅

Community Toured

Account Executive

Start Date

31/10/2013

📅

Start Time

4 : 10 : 12 PM

⬆️⬆️⬆️

Add Tour

Yes

Tour Type

Deal

End Date

31/10/2013

📅

End Time

4 : 10 : 12 PM

⬆️⬆️⬆️

Assign to

Jhon Smith

Thomas

+

Email

jamesadam@smarttouchinteractive.com

jamesadam@smarttouchinteractive.com

jamesadam@smarttouchinteractive.com

+ Add Email Address

Save Meeting

Cancel

13

✎

🗑

13

13

.

100


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) »


🔍 Search


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Dashboard
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Campaigns
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Automation
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Reports
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Properties
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Events

Contacts

🔍 Search

	Full Name	Company	Email	Phone
<input checked="" type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512) 345-6789
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512) 345-6789
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512) 345-6789

Total Count : 100

Add Opportunity

Opportunity Description


Potential

\$ 500,000

Probability

90% ▾

Expected Close

31/10/2013 

Status

Lead ▾

People

Jhon Smith ×

Thomas ×

+

Search Tags

Manager ×

Record ×

+

Inventory Tags

Commercial Land ×


+


Save


Cancel


🔍 Search


▼


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Dashboard
- 

Contacts
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Campaigns
- 

Automation
- 

Reports
- 

Properties
- 

Events

Contacts

🔍 Search

	Full Name	Company	Email	Phone
<input checked="" type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512) 777-1234
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512) 777-1234
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512) 777-1234

Add Relationship

Contact

Relationship Type

Jenny Janda

Account Executive ▼

Add

- [Jenny Janda](#)

Account Executive ▼

🗑️
- [Jenny Janda](#)

Account Executive ▼

🗑️
- [Jenny Janda](#)

Account Executive ▼

🗑️

Save

Cancel

Total Count : 100

Search

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+ Add Contact

Manage Tags

Send Email

Add Action

Add Note

Add Meeting

More

+

🕒

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⚙️

Contacts

Search

	Full Name	Company	Email	Phone			
<input checked="" type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)7			
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)7			
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)7			

Total Count : 100

Page: 8

<< 1 2 3 4 . . 100 >>

Update Contacts

Contact Field

Full Name

Value

Jhon Smith

+ Add Fields

Update

Cancel

Search

Dashboard

Contacts

Campaigns

Automation

Reports

Properties

Events

+ Add Contact

Manage Tags

Send Email

Add Action

Add Note

Add Meeting

More

+

Contacts >> Copy Contact

Copy Contact

First Name

Last Name

Company Name

Phone Number & Type

Mobile

9848022338

Work

9848022838

+ Add Phone Number

Email

thomas@gmail.com

thomas112@gmail.com

+ Add Email;

Web & Social Link

Blog

https://accounts.google.com

Twitter

https://accounts.google.com

+ Add Web & Social Link

Address Type

Home

City

Street

State

Texas

Zip Code

Country

Hong Kong

SSN

+ Add Address

Save

Cancel

+ Add Contact

Manage Tags

Send Email

Add Action

Add Note

Add Meeting

More

Search

Contacts

10 items

+ Add Contact

Dashboard

Contacts

Campaigns

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Reports

Properties

Events

Full Name

Company

Grant Taylor

SmartTouch

Grant Taylor

SmartTouch

Grant Taylor

SmartTouch

Total Count : 100

Export fields

Available fields

Find available fields

Contact ID

First Name

Last Name

Email Address

Phone

Available field 1

Available field 2

Available field 3

Available field 4

Available field 5

Primary sort order

Last Name

Ascending

Secondary sort order

First Name

Ascending

Export format

Microsoft Excel

Export Contacts

Cancel

View

10 items

Export fields

All Fields

Primary sort order

Last Name

Ascending

Secondary sort order

First Name

Ascending

Export format

Microsoft Excel

Export Contacts

Cancel

Export fields

List Fields

All Fields

Full Name

Phone number

Email address

Primary sort order

Last Name

Ascending

Secondary sort order

First Name

Ascending

Export format

Microsoft Excel

Export Contacts

Cancel

Search

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+ Add Contact

Manage Tags

Send Email

Add Action

Add Note

Add Meeting

More

Contacts

items

+ Add Contact

	Full Name	Company					Last Contacted
<input checked="" type="checkbox"/>	Grant Taylor	SmartTouch					Contacted on Aug 15th 2013
<input type="checkbox"/>	Grant Taylor	SmartTouch					Contacted on Aug 15th 2013
<input type="checkbox"/>	Grant Taylor	SmartTouch					Contacted on Aug 15th 2013

Total Count : 100

Page: 8

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1

2

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100

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Export

Select Columns

Options

Select File Format

☒

CSV

☐

Excel

☐



Notepad

Export

Cancel



View 10 items ▼

	Contacts
	Campaigns

Page: 8 << 1 2 3 4 . . 100 >>





Archived Contacts

Q Search

View 10 items ▼

- Events

	Full Name	Company	Email	Phone & Type	Lifecycle	Last Contacted
<input checked="" type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032	Prospect	Contacted on Aug 15th 2013  
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032	Prospect	Contacted on Aug 15th 2013
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032	Opportunity	Contacted on Aug 15th 2013

Total Count : 100

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« (1 2 3 4 . . 100) »

Search

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+ Add Contact

Unarchive

Move to

Archived Contacts

Select Group

Group1

Save

Cancel

Search

View

10 items

	Full Name		Email	Phone & Type	Lifecycle	Last Contacted
<input checked="" type="checkbox"/>	Grant Taylor		gtaylor@smarttouchinteractive.com	(512)736-9032	Prospect	Contacted on Aug 15th 2013 <div><div></div><div></div></div>
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032	Prospect	Contacted on Aug 15th 2013
<input type="checkbox"/>	Grant Taylor	SmartTouch	gtaylor@smarttouchinteractive.com	(512)736-9032	Opportunity	Contacted on Aug 15th 2013

Total Count : 100

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+ Add Contact

Manage Tags

Send Email

Add Action

Add Note

Add Meeting

More

+

🕒

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⚙️

Contacts >> Edit Contact

Edit Contact

First Name

Last Name

Company Name

Phone Number & Type

Mobile

9848022338

Work

9848022838

+ Add Phone Number

Email

thomas@gmail.com

thomas112@gmail.com

+ Add Email;

Do not email

Yes

Web & Social Link

Blog

https://accounts.google.com

Twitter

https://accounts.google.com

+ Add Web & Social Link

Address Type

Home

City

Street

State

Texas

Zip Code

Country

Hong Kong

SSN

+ Add Address

Save

Cancel

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+ Add Contact

Manage Tags

Send Email

Add Action

Add Note

Add Meeting

More

+

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⚙️

Contacts >> Grant Taylor Profile

Grant Taylor

Product Manager at Smart Touch Interactive

(512)736-9032

grant@smartrtouch.com

📝 Edit

LifeCycle

Prospect

Last Contacted

23/10/2013

🎂 Birthday: November 9th

📍 Address: 109 Ave, 5th Street

Manager

Product

+

Timeline

Contact Info

Property

Attachments

November

Jenny Janda has updated contact details for Grant Taylor

Contact number changed

Jenny Janda has updated Next Action for Grant Taylor

Jenny Janda has taken Tour for Grant Taylor on Nov 3rd

October

Jenny Janda has updated contact details for Grant Taylor

Contact number changed

Jenny Janda has updated Next Action for Grant Taylor

Jenny Janda has taken Tour for Grant Taylor on Nov 3rd

September

Jenny Janda has updated contact details for Grant Taylor

Contact number changed

Jenny Janda has updated Next Action for Grant Taylor

Jenny Janda has taken Tour for Grant Taylor on Nov 3rd

Sort by

All Activities

☒ All

☐ Notes

☐ Emails

☐ Contacts

☐ Tours

All Time

All

Last 30 Days

Last 60 Days

Last 90 Days

Engagement

30 Days

250

Lead Score

15

Lead Score

66%

Lead Score

33%

Click Rate

Actions

Meet Thomas at 7:00PM

11/12/2013

Meet Thomas at 7:00PM

11/12/2013

Meet Thomas at 7:00PM

11/12/2013

Opportunity

Lot 1, Block B, The Hollows

\$450,000 value at 90% probability

In Negotiation stage

Expected to close 10/2/2013

+ Add Opportunity

Relationship Type

Jenny Janda

Account Executive

+ Add Relationship



Search

Dashboard

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Properties

Events

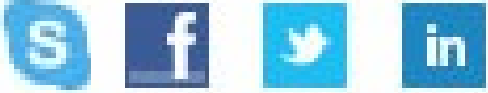
+ Add Contact Manage Tags Send Email Add Action Add Note Add Meeting More ▼



Contacts >> Grant Taylor Profile



Grant Taylor
Product Manager at Smart Touch Interactive
(512)736-9032
grant@smarttouch.com



Edit

LifeCycle
Prospect
Last Contacted
23/10/2013

Manager × Product × +

Timeline Contact Info Property Attachments

Group 1

Selected fields

grant taylor

Selected fields

grant taylor

Selected fields

grant taylor

Group 2

Selected fields

grant taylor

Selected fields

grant taylor

Selected fields

grant taylor

Engagement 30 Days ▼



Action

- Meet Thomas at 7:00PM 11/12/2013
- Meet Thomas at 7:00PM 11/12/2013
- Meet Thomas at 7:00PM 11/12/2013

Opportunity

Lot 1, Block B, The Hollows
\$450,000 value at 90% probability
In Negotiation stage
Expected to close 10/2/2013
+ Add Opportunity

Relationship Type

Jenny Janda Account Executive
+ Add Relationship

Search

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Send Email

Add Action

Add Note

Add Meeting

More

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⚙️

Contacts >> Grant Taylor Profile

Grant Taylor

Product Manager at Smart Touch Interactive

(512)736-9032

grant@smarttouch.com

Edit

LifeCycle

Prospect

Last Contacted

23/10/2013

Manager

Product

+

Timeline

Contact Info

Property

Attachments

Drag and Drop Files

(or) [Select from your Computer](#)

Attach

Cancel

Robert has added Authority details

Jessi has added Potential details and Lead Report

Robert has added Authority details

Jessi has added Potential details and Lead Report

Robert has added Authority details

Jessi has added Potential details and Lead Report

Robert has added Authority details

Engagement

30 Days

250

Lead Score

15

Lead Score

66%

Lead Score

33%

Click Rate

Action

Meet Thomas at 7:00PM

11/12/2013

Meet Thomas at 7:00PM

11/12/2013

Meet Thomas at 7:00PM

11/12/2013

Opportunity

Lot 1, Block B, The Hollows

\$450,000 value at 90% probability

In Negotiation stage

Expected to close 10/2/2013

+

Add Opportunity

Relationship Type

[Jenny Janda](#) Account Executive

+

Add Relationship

Search

Dashboard

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Properties

Events

Monday, 02 December 2013

DayWeekMonthYear

12 pm

1 pm

2 pm

Meeting with Rockwood Ventures (2am - 4am)

3 pm

4 pm

5 pm

6 pm

7 pm

8 pm

9 pm

Save

Title

Meeting with Rockwood Ventures

From :

2 am

To :

5 am

Reminder :

☒

Phone

15

Min

☒

Email

15

Min

Importance :

Add People :

All Activities

December 2013

Mon, 02

Today,Meeting with Rockwood2 pm - 5 pm

Today,Meeting with Rockwood7 pm - 9 pm

Tue, 03

Meeting with Rockwood2 pm - 5 pm

Wed, 04

Meeting with Rockwood2 pm - 5 pm

Thr, 05

Meeting with Rockwood2 pm - 5 pm

Fri, 06

Meeting with Rockwood2 pm - 5 pm

Sat, 07

Meeting with Rockwood2 pm - 5 pm

Sun, 07

Mon, 02

Today,Meeting with Rockwood2 pm - 5 pm

Today,Meeting with Rockwood7 pm - 9 pm

Tue, 03

Meeting with Rockwood2 pm - 5 pm

January 2014

February 2014

March 2014

April 2014

Search

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+ Add Contact

Manage Tags

Send Email

Add Action

Add Note

Add Meeting

More ▼

+

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⚙️

🔍 Search

Contacts

🔍 Search

View 10 items ▼

+ Add Contact

☰

🗪

Find Archived ▼ that match all ▼ of the following criteria:

Lead Score ▼

is greater than ▼

124

[add](#) | [remove](#)

Company name ▼

Contains ▼

google

[add](#) | [remove](#)

Last Contacted ▼

is older than ▼

03/06/2013📅

[add](#) | [remove](#)

Find

🖼️ Properties

🖼️ Events

Email	Phone & Type	Lifecycle	Last Contacted
smarttouchinteractive.com	(512)736-9032	Prospect	Contacted on Aug 15th 2013✎🗑️
smarttouchinteractive.com	(512)736-9032	Prospect	Contacted on Aug 15th 2013
smarttouchinteractive.com	(512)736-9032	Opportunity	Contacted on Aug 15th 2013

Total Count : 100

Page: 8<<1234. .100>>

+ Add Contact

Manage Tags

Send Email

Add Action

Add Note

Add Meeting

More ▼

+

🕒

💬

⚙️

🔍 Gra

×

Contacts

🔍 Search

View 10 items ▼

All

Actions

Campaigns

Companies

Contacts

Deals

Notes

Files

Events

👤 Grant Taylor

✓ Grant Opening,INC

✉ 123 Grantview Drive

🗣 Rockport Grand

📄 Rockport Grand

🔗 Attendance for Grant Opening

👤 Grant Taylor

🗣 Rockport Grand

Email	Phone & Type	Lifecycle	Last Contacted
gtaylor@smarttouchinteractive.com	(512)736-9032	Prospect	Contacted on Aug 15th 2013 <div>✎ 🗑</div>
gtaylor@smarttouchinteractive.com	(512)736-9032	Prospect	Contacted on Aug 15th 2013
gtaylor@smarttouchinteractive.com	(512)736-9032	Opportunity	Contacted on Aug 15th 2013

Total Count : 100

⏪

1

2

3

4

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100


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Page: 3


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Search


▼


- 


Dashboard
- 

Contacts
- 

Campaigns
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Automation
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Reports
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Properties
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Events

Contacts >> Add Contact

Basic Fields

First Name	Last Name
<input type="text"/>	<input type="text"/>
Email	Company
<input type="text"/>	<input type="text"/>
Address/Street	Mobile Number
<input type="text"/>	<input type="text"/>
Email	Company
<input type="text"/>	<input type="text"/>

Status

First Name	Last Name
<input type="text"/>	<input type="text"/>
Email	Company
<input type="text"/>	<input type="text"/>

- Discovery
- Webinar info
- Sales info
- Tours
- Notes
- Groups
- Tasks
- More ▼

Title	Company Type
<div>Options ▼</div>	<div>Options ▼</div>
Number of Users	Using CRM now
<input type="text"/>	<div>Yes <input checked="" type="checkbox"/></div>
Address/Street	Mobile Number
<input type="text"/>	<input type="text"/>
Email	Current CRM
<input type="text"/>	<div>Options ▼</div>
Annual Revenue	Number of Offices
<div>Options ▼</div>	<input type="text"/>
Current CRM	Using Email Platform
<div>Options ▼</div>	<div>Options ▼</div>
Budget	Company
<input type="text"/>	<input type="text"/>
Budget	Using CRM now
<input type="text"/>	<div>No <input checked="" type="checkbox"/></div>
Budget	Using CRM now
<input type="text"/>	<div>ON <input checked="" type="checkbox"/></div>

Save

Cancel

Event Details

Reminder Date

31/10/2013



Event Title

Event Status

Active



Event Date

11/11/2013



Event Time

1:00 PM



Assign to

A

Groups

Abc group

Contacts


Allen

Save Event

Cancel

Tour Details

Reminder Date

Toured On

Relationship Type

 ▼

Tour Type

 ▼

Prospect

Assign to

Save Tour

Cancel