



Follow Up Boss

How to Create a Client

[\(Video Tutorial\)](#)

- If the client is a lead from one of the HG websites they will be found in your FUB
 - a. After speaking to the client begin to fill in the client profile as much as possible
- If the client is an independent lead add them to FUB and add as much information as possible to the client profile
 - a. Select the button circled in red in the top right corner to add a new contact

The screenshot shows the Follow Up Boss dashboard. At the top, there is a navigation bar with icons for People, Inbox, Tasks, Calendar, Deals, Reporting, and Admin, along with a search bar. On the right side of the navigation bar, there are several circular icons, one of which is circled in red. Below the navigation bar, there are five summary cards: 'NEW LEADS' (9, 4 unactioned, up 12.5% vs 8), 'AVG. CONTACT ATTEMPTS' (0.67, down 11.1% vs 0.75), 'SPEED TO ACTION' (4 days, down 63.2% vs 11 days), 'APPTS NEXT 30 DAYS' (28, 89 tasks), and 'DEALS NEXT 30 DAYS' (\$768,285, 1 deal). Below these cards is a 'RECENT ACTIVITY' section with a table of recent activities. The table has columns for Name, Email, Phone, Last Activity, Time, Stage, and Assigned.

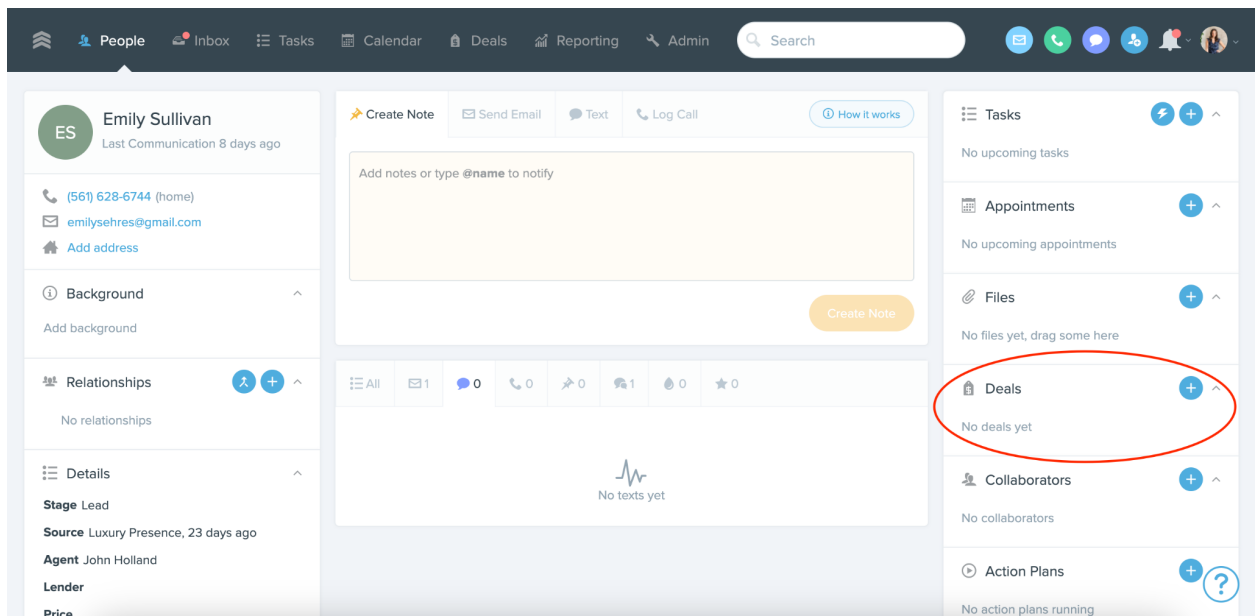
Name	Email	Phone	Last Activity	Time	Stage	Assigned
Karim Shawky	karimshawky@gmail.com	(561) 312-8921	Opened Email via ActivePipe	9 hours ago	Lead	John Holland
Aaron Gorall	aaron@sierraclinical.com	(260) 414-3348	Opened Email via ActivePipe	21 hours ago	Lead	John Holland

Creating Client Deals in FUB

([Video Tutorial](#))

Creating a Buyer Deal

- To create a deal in FUB go into the client profile of the client who you will be managing the deal for.
- On the right side in the deal box hit the plus sign



- Title the deal “Last Name Home Search”
- People should be all clients who will be signing the contracts
 - a. Husbands and wives need separate client profiles and both should be added to the deals
- Make sure the team is yourself (this should automatically happen)
- All other fields will be blank at this time which is ok.
- Click ‘create deal’.

a. EX.

The screenshot shows a CRM interface with a client profile for Emily Sullivan on the left. The profile includes contact information, background, relationships, and details. A modal titled "Client Last Name" is open in the center, allowing the user to create a deal. The modal has tabs for "Buyers" and "Pre Buyer Broker Agreement". It contains sections for PRICE, CLOSE DATE, COMMISSION, SPLITS, PEOPLE, TEAM, DESCRIPTION, and CUSTOM FIELDS. Each section has a link to add or edit the respective field. At the bottom of the modal are "Cancel" and "Create Deal" buttons.

Client Last Name

Buyers > Pre Buyer Broker Agreement

PRICE
Add price

CLOSE DATE
Add close date

COMMISSION
Add commission

SPLITS
Add agent split
Add team split

PEOPLE
ES +

TEAM
+

DESCRIPTION
Add description

CUSTOM FIELDS
Show all fields

Cancel Create Deal

- You will now see the deal under deals in the client profile

The screenshot shows the CRM interface with the client profile for Emily Sullivan. The profile is updated with the deal "Client Last Name" under the "Deals" section. The deal is listed as "Client Last Name" and "Pre Buyer Broker Agreement in Buyers". The interface also shows a "Create Note" button and a "Send Email" button. The right sidebar shows a list of tasks, appointments, files, deals, collaborators, and action plans.

Emily Sullivan
Last Communication 8 days ago

(561) 628-6744 (home)
emilysehres@gmail.com
Add address

Background
Add background

Relationships
No relationships

Details
Stage Lead
Source Luxury Presence, 23 days ago
Agent John Holland
Lender
Price

Create Note
Send Email
Text
Log Call
How it works

Add notes or type @name to notify

Create Note

All 1 0 0 0 1 0 0

No texts yet

Person 1 of 6

Tasks
No upcoming tasks

Appointments
No upcoming appointments

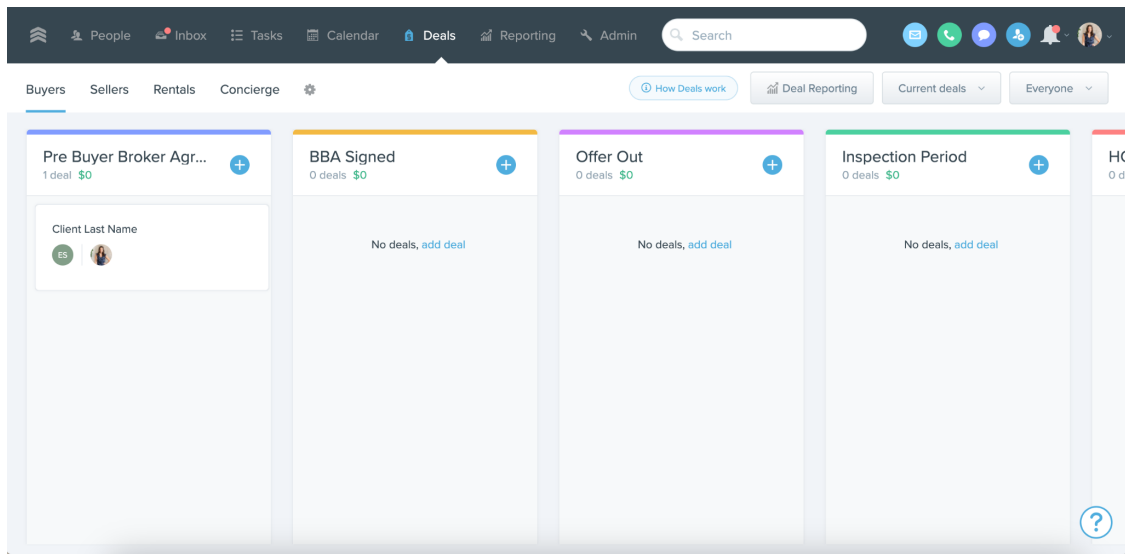
Files
No files yet, drag some here

Deals (1)
Client Last Name
Pre Buyer Broker Agreement in Buyers

Collaborators
No collaborators

Action Plans

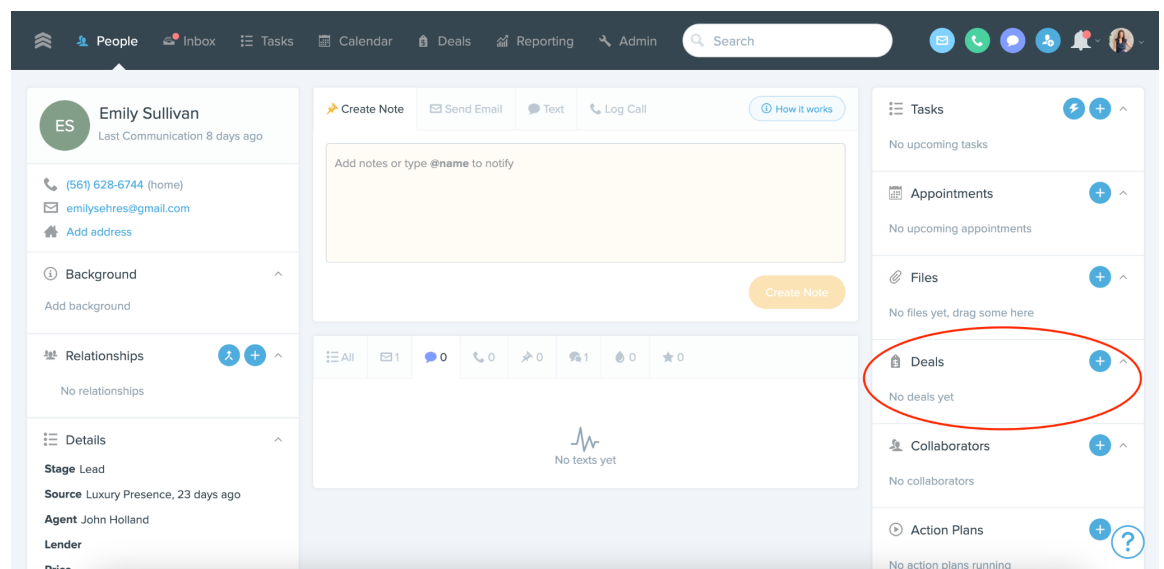
- You can also see all deals for all of your clients in the deal tab in the top menu.



- As your client moves through the stages of the deal, move their deal box by clicking and dragging it.
- This will all automatically be pushed to Brokermint. And anytime you make a change you will see that in Brokermint too. [Click here](#) to see how to find the FUB deal in Brokermint!

Creating a Seller Deal

- To create a deal in FUB go into the client profile of the client who you will be managing the deal for.
- On the right side in the deal box hit the plus sign



- c. Add the client's address of the property that will be listed for sale as the title of the deal
- d. click on the word buyers for the drop down to appear and hit seller.

- e. Click on the word potential and select whichever stage of the deal best represents where you and your client are at.

- f. People should be all clients who will be signing the contracts

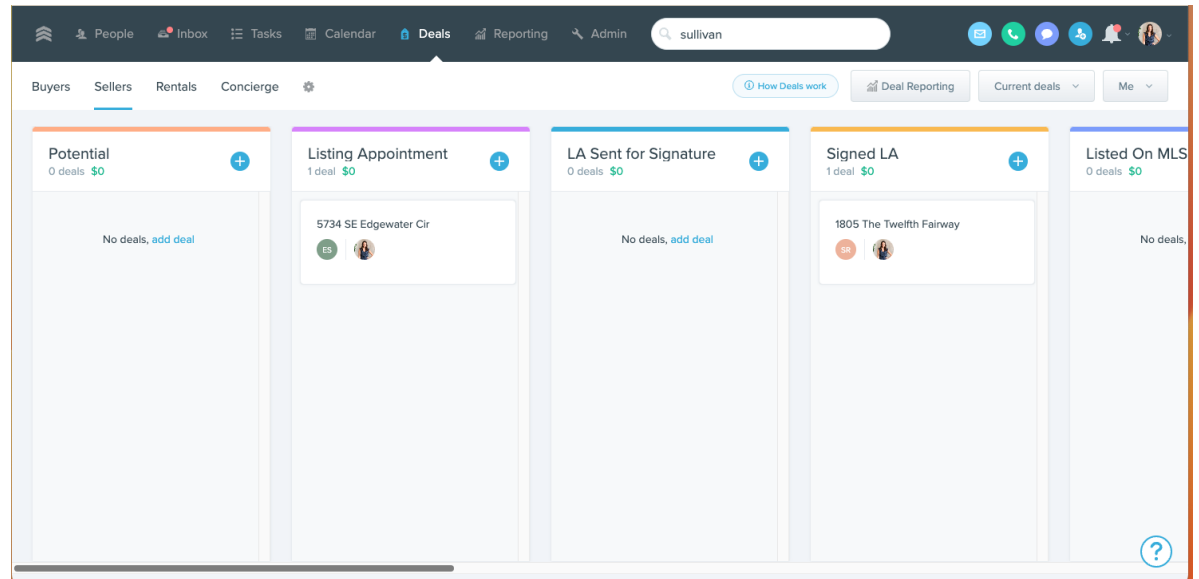
- i. Husbands and wives need separate client profiles and both should be added to the deals
- g. Make sure the team is yourself (this should automatically happen)
- h. Fill in as many fields as possible in the custom fields section so Emily knows property details.

The screenshot shows a mobile application interface for creating a deal. The form is divided into several sections:

- DESCRIPTION**: Contains a link to "Add description".
- CUSTOM FIELDS**: A list of fields to be filled out:
 - Bedrooms 2
 - Bathrooms 2
 - Half Bath 1
 - SQFT - Living 1406
 - SQFT - Total 1895
 - Community
 - Pool No
 - View Lake
 - Additional Features
 - Inspection Period End Date
 - Escrow Deposit Due Date
 - Additional Escrow Deposit Due Date
 - Loan Approval Date
 - Title Commitment
 - Listing Live 11/15/2024
 - Listing Expires 05/30/2025
 - Additional Important Date

At the bottom of the form, there is a "Cancel" button and a blue "Create Deal" button.

- i. Hit create deal.
- j. You can also view this deal in the Deal tab in the top menu of the site.
 - i. When you click into the deal tab Buyers deals will always show first. Make sure to click Seller or Rental to see the deals you are looking for.



- k.
- This will all automatically be pushed to Brokermint. And anytime you make a change you will see that in Brokermint too. [Click here](#) to see how to find the FUB deal in Brokermint!