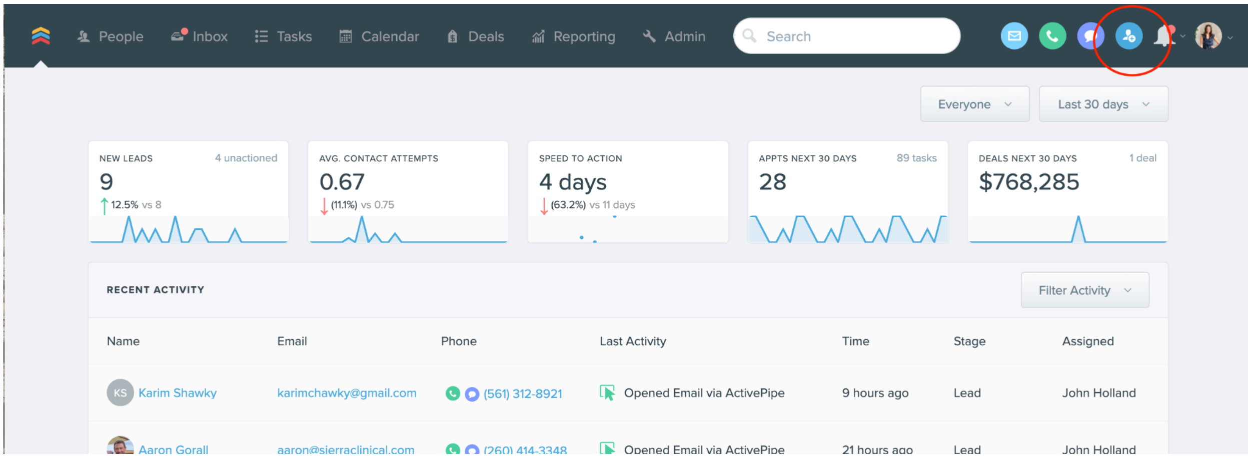
Follow Up Boss

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

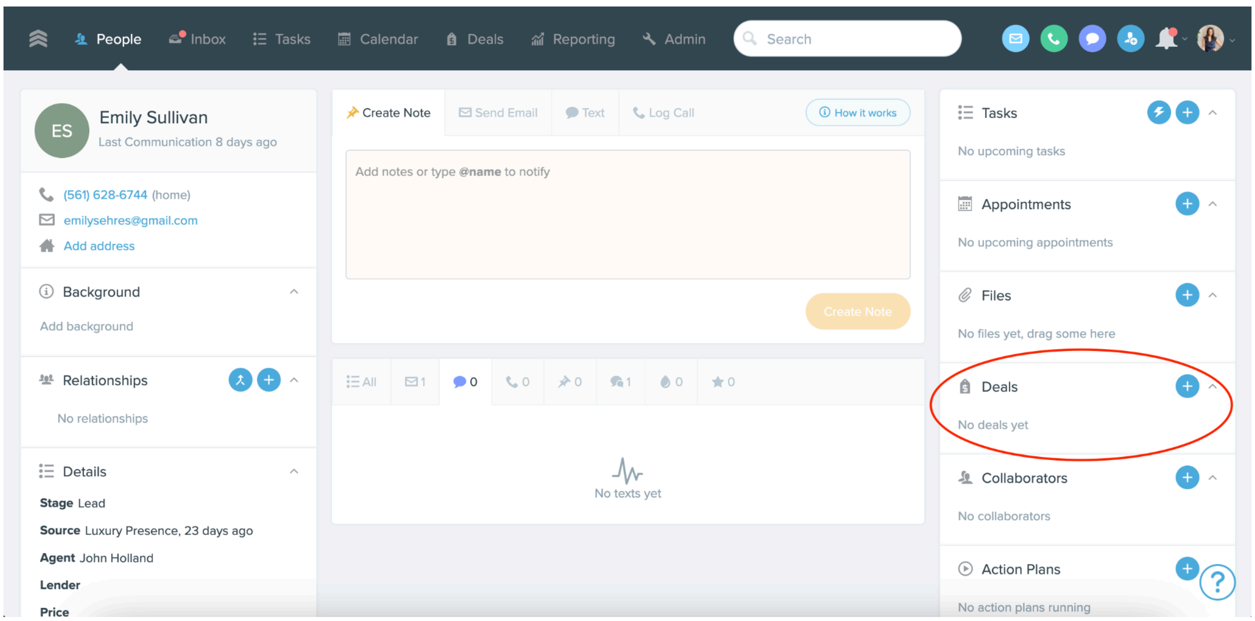


Creating Client Deals in FUB

([Video Tutorial](#))

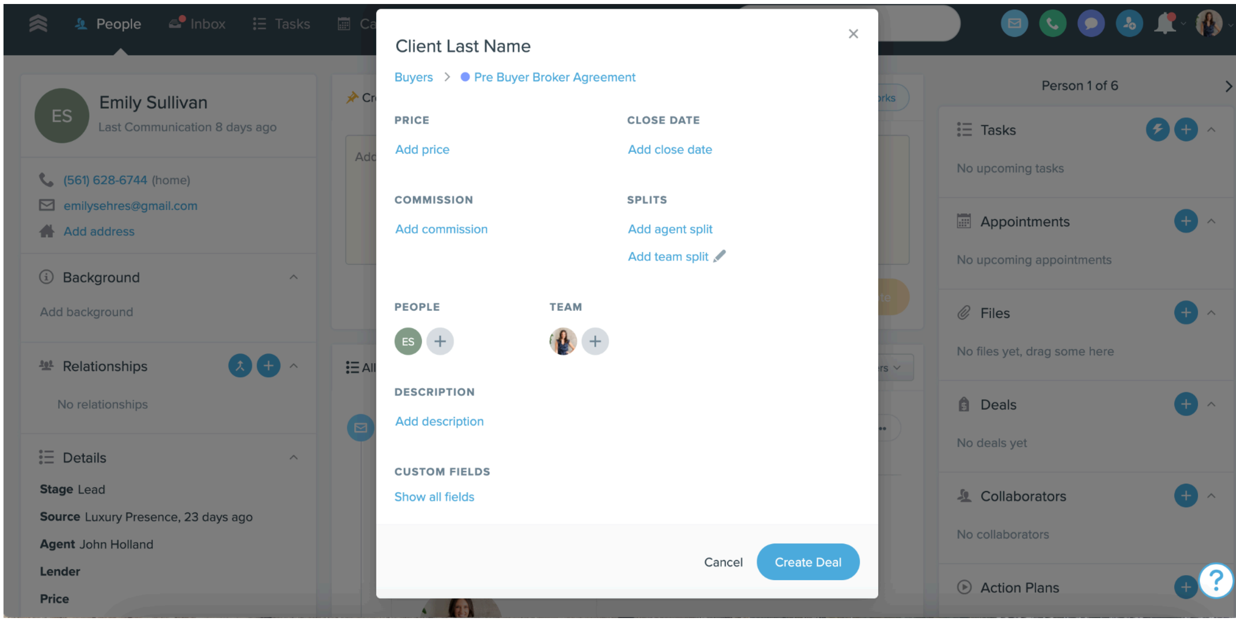
Creating a Buyer Deal

- 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

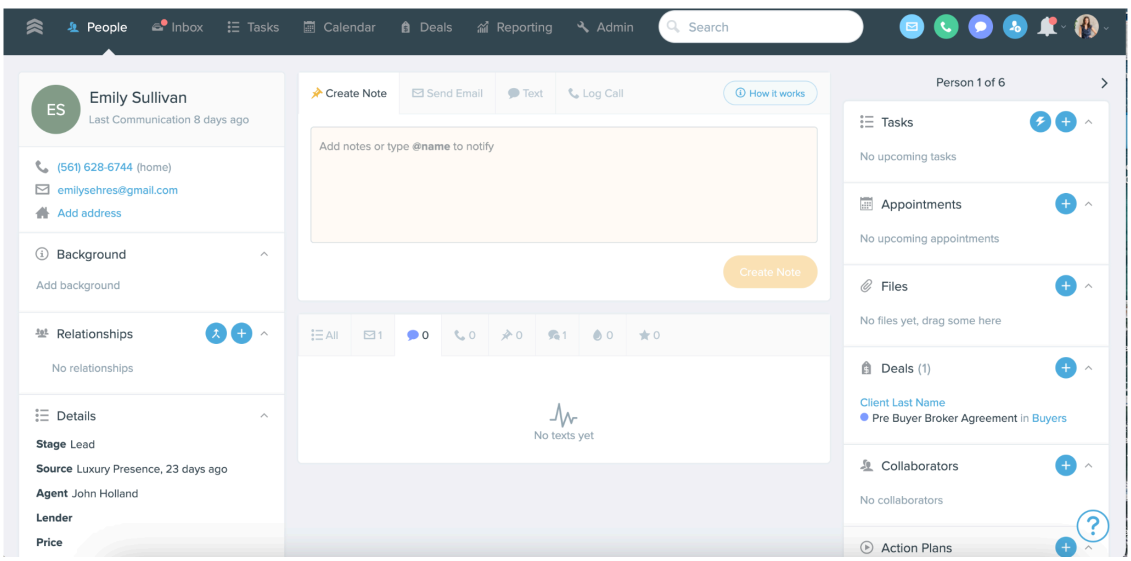


- Title the deal “Last Name Home Search”
- People should be all clients who will be signing the contracts
    a. Husbands and wives need separate client profiles and both should be added to the deals
- Make sure the team is yourself (this should automatically happen)
- All other fields will be blank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

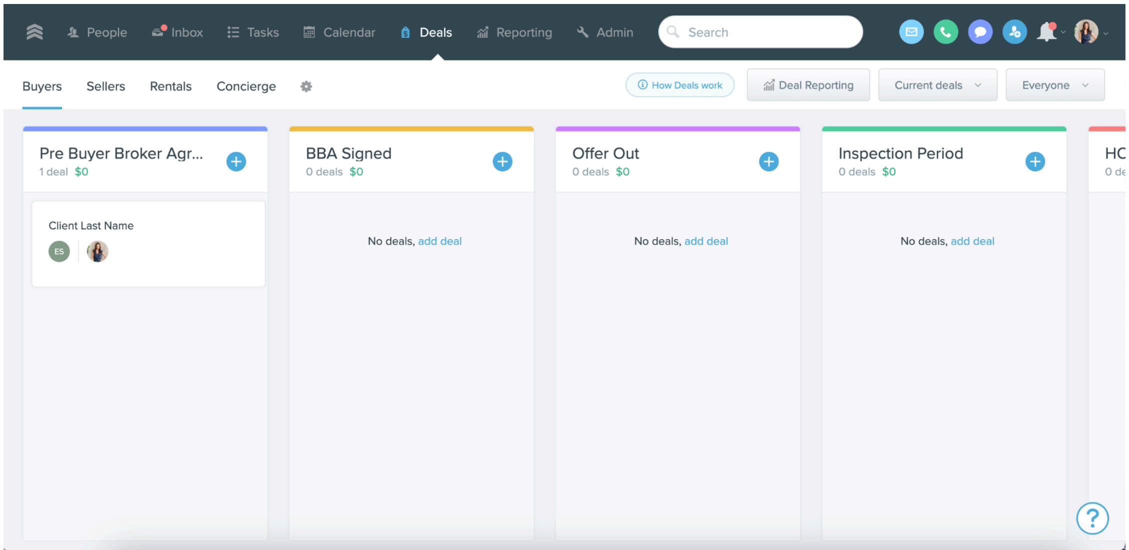
a. EX.



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



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

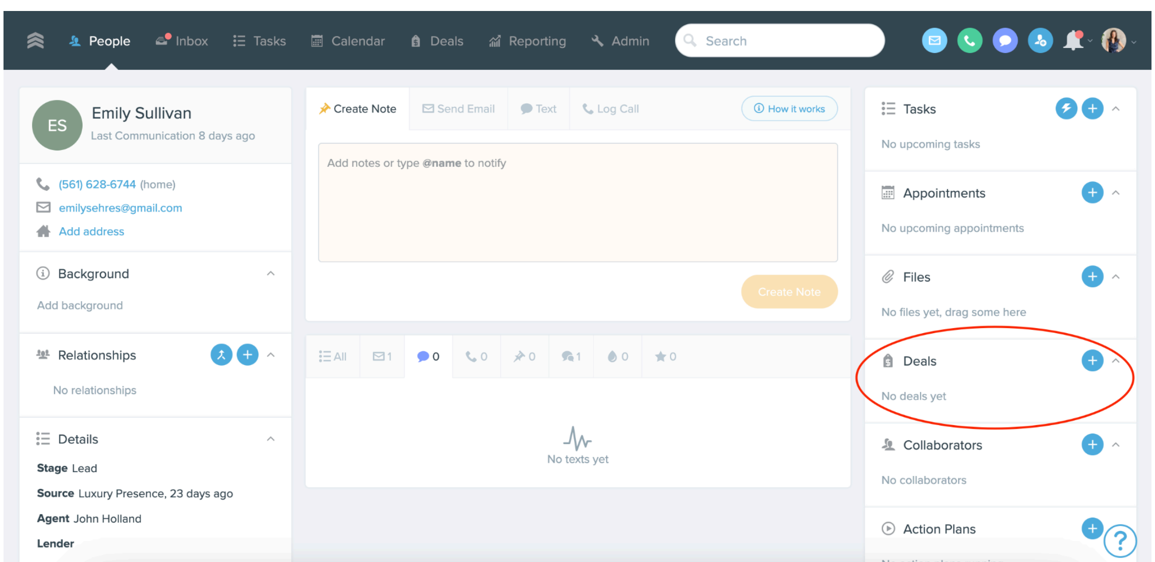


   a. As your client moves through the stages of the deal, move their deal box by clicking and dragging it.

- 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!

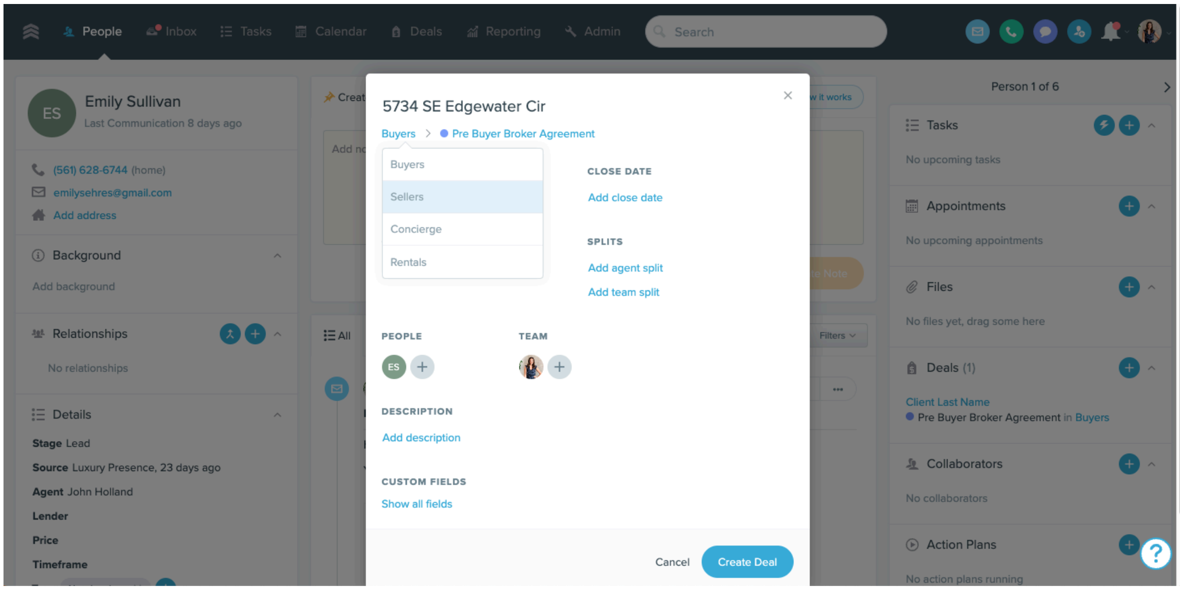
Creating a Seller Deal

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

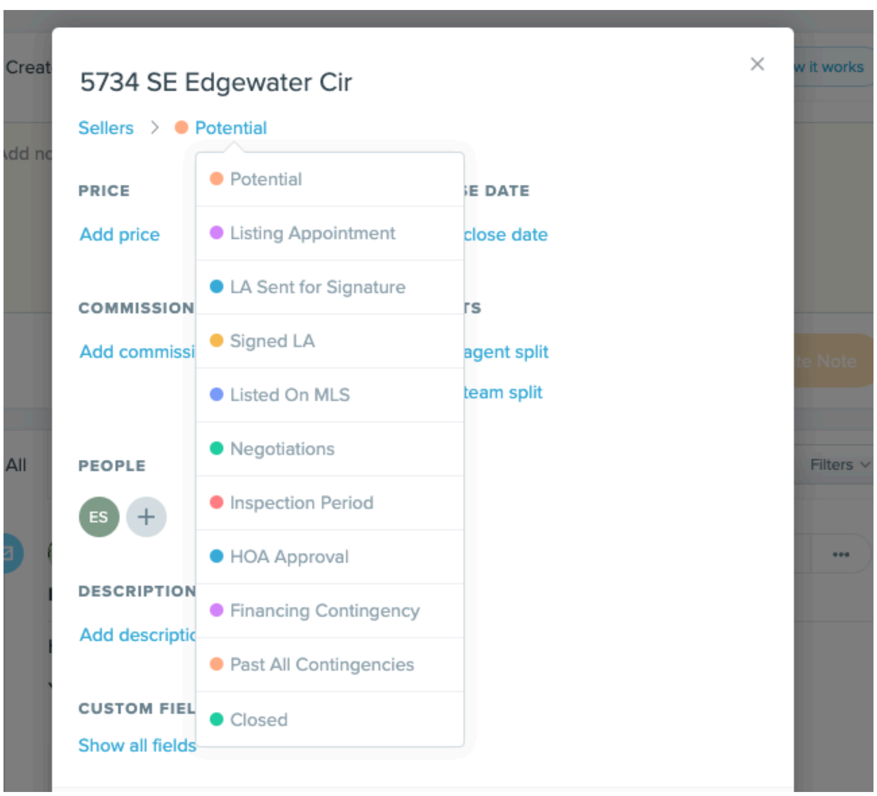


c. Add the client's address of the property that will be listed for sale as the title of the deal

d. click on the word buyers for the drop down to appear and hit seller.



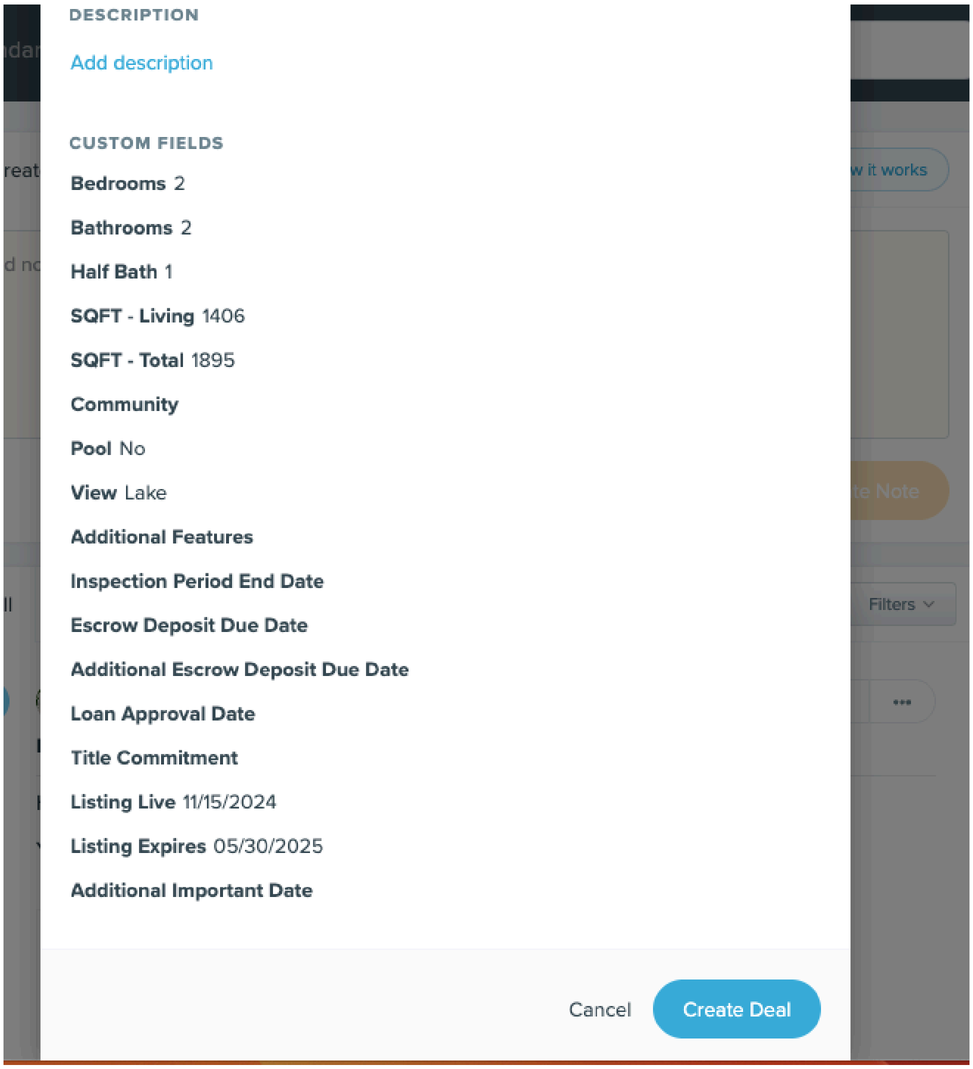
e. Click on the word potential and select whichever stage of the deal best represents where you and your client are at.



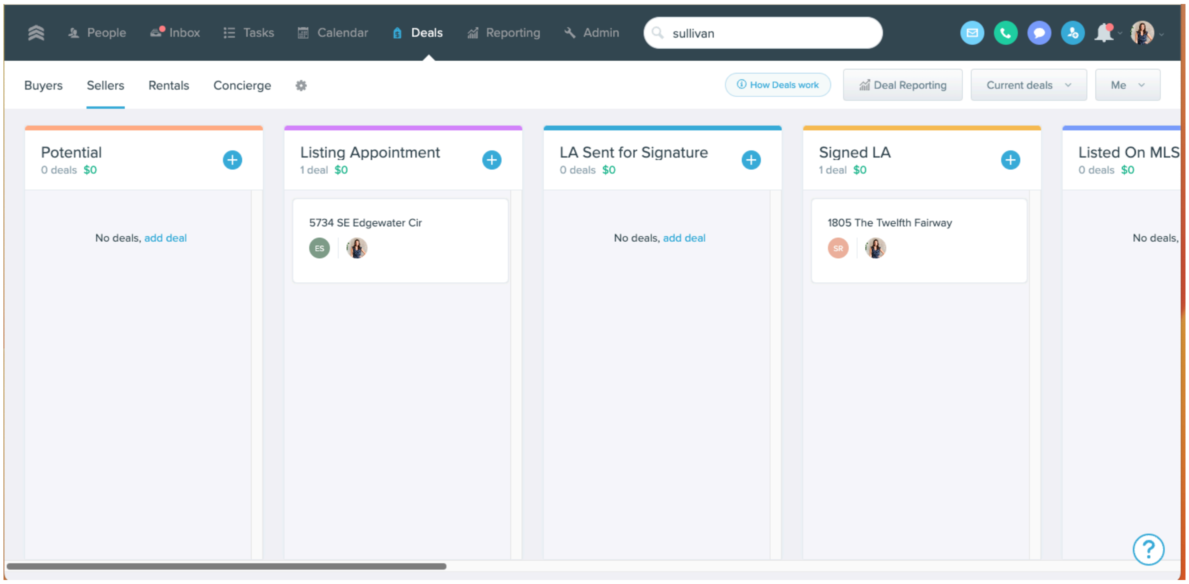
f. People should be all clients who will be signing the contracts

        i. Husbands and wifes 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.



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!