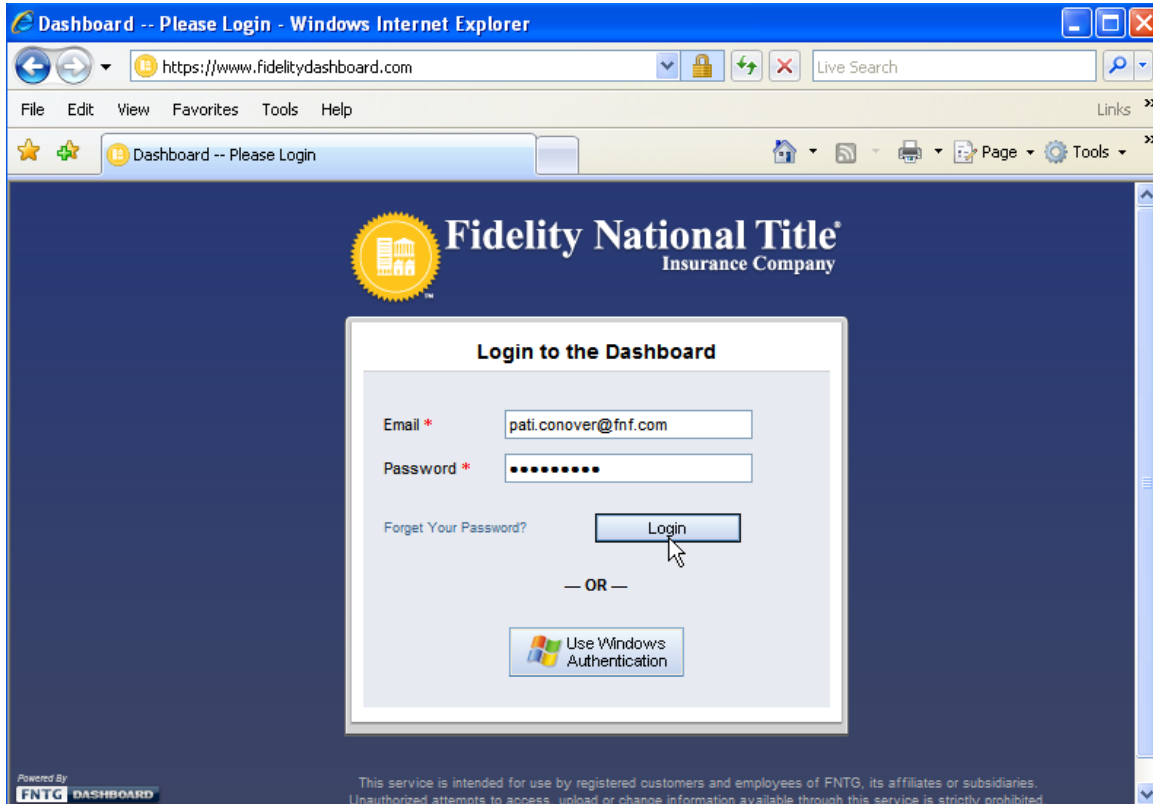


# Dashboard for Marketing Reps

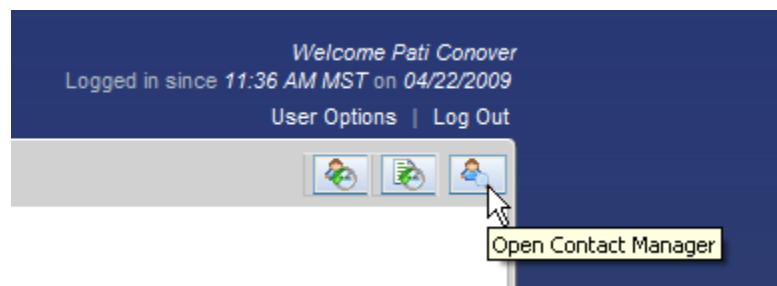
## How to Search for Client Info

[www.fidelitydashboard.com](http://www.fidelitydashboard.com)

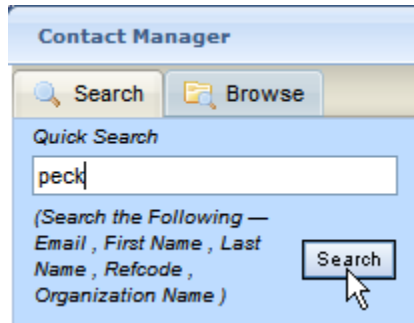
1. **Login to Dashboard using your Fidelity email address and your current email password (see below).**



2. **Once in Dashboard, single click the *Open Contact Manager* icon in the upper right hand corner of the screen (see below).**



- To search for a contact, enter the contact's first name in the *Quick Search* field and single click the *Search* button (see below).**



- This will bring up a list of contacts that meet the search criteria. Once you've found the correct contact, double click the contact name to bring up the details page (see below).**

	Christina Robinson, April Peck	2390 E. Camelback Rd., Ste. 140,	Phoenix
	April Peck, Mary Saer	2390 E. Camelback Rd., , Suite 140	Phoenix
	April Peck, Brandon Smith	2390 E. Camelback Rd Suite 140,	Phoenix
	April Peck, Melissa S. Diana Zeped	2390 E. Camelback Rd., , Suite 140	Phoenix
	Brad Denton, April Peck	2390 E. Camelback Rd., Ste. 140,	Phoenix
	Diana Zepeda, April Peck	2390 E. Camelback Rd., Ste. 140,	Phoenix
	Jen Weller, April Peck	2390 E. Camelback Rd., Ste. 140,	Phoenix
	Palmisano, Terrie	4111 East Valley Auto Drive#108,	Mesa
	Peck, Andrew L.	—	—
	Peck, Shari	21803 N Scottsdale Rd, Ste 100,	Scottsdale
	Peck, Michael	4111 East Valley Auto Drive#108,	Mesa
	Peck, Marge	4111 East Valley Auto Drive #108,	Mesa
	Peck, April	2390 E Camelback Rd, Ste 140	Phoenix
	Vaivao, Cathy	1757 E. Baseline Rd. #142,	Gilbert
	Walker, Kay	4111 East Valley Auto Drive#108,	Mesa
	Whetten, Bill	1757 E. Baseline Rd. #142,	Gilbert
	Wright, Shane	4111 East Valley Auto Drive#108,	Mesa

**5. The contact record *General* tab shows specific detail on the contact, including contact information, order history and Softpro Refcode (see below).**

The screenshot shows the 'Contact Manager' interface for a contact named 'Peck, Marge'. The interface is divided into several sections:

- Left Sidebar:** Contains a photo placeholder, 'Organizations' (with a red box around 'Discover Arizona Real E...'), and an 'Order Summary' table.
- Top Navigation:** Includes tabs for 'General', 'Orders' (highlighted with a red box and arrow), 'Sourcing', 'Delegates', and 'Marketing'.
- Main Content Area:** Displays contact details such as 'First Name: Marge', 'Last Name: Peck', 'Job Title: Real Estate Agent', and 'Contact Type(s): Real Estate Agent'. It also shows 'Contact Status' (active), 'Addresses' (4111 East Valley Auto Drive #106, Mesa AZ, 85206), and 'Phone' information.
- Bottom Section:** Labeled 'Contact Data', it shows the 'Refcode' as 'PECMAR001' (highlighted with a red box and arrow).

Callout boxes provide additional context:

- Client Orders Tab:** 'click to see the specific orders associated with this client record.'
- Client Organization:** 'click to see the parent Organization for this client.'
- Order Summary:** 'shows the orders opened, closed and canceled in the last 30, 60, 90, 120 days for this client.'
- Refcode:** 'This is the unique client ID that Escrow uses when opening an order for this client.'

	Open	Closed	Cancel
Last 30 Days	5	2	1
Last 60 Days	11	2	2
Last 90 Days	26	3	5
Last 120 Days	31	9	8

Additional summary statistics:

- Average Sales Price - \$179,673.33
- Average Loan Amt. - \$158,148.52
- Last Order Date - 4/21/2009 12:00:00 AM

**6. Single click the *Orders* tab to see the orders associated with this contact. Use the filters listed below to show different order data.**

The screenshot shows the 'Order History' section of a software interface. At the top, there are tabs for 'General', 'Orders', 'Sourcing', 'Delegates', and 'Marketing'. Below the tabs, there are several filter controls:

- Quick Date Fill:** Includes links for 'Yesterday', 'Today', 'This Month', 'Last month', and 'Year'. Below these are 'Begin Date' (10/22/2008) and 'End Date' (4/22/2009) fields with calendar icons.
- Party Types to Display:** Two dropdown menus for 'Party 1' (set to 'Buyer/Borrower') and 'Party 2' (set to 'Seller').
- Status:** A dropdown menu currently set to 'Open'.
- Buttons:** 'Update' and 'Save' buttons are located at the bottom right of the filter area.

Below the filters is a table of orders with the following columns: File, Trans. Type, Order Type, Buyer/Borrower, Seller, and Status. The table contains several rows of order data.

Four callout boxes provide instructions on how to use the interface:

- Top Right:** "To see orders by a different status, select the new status from the drop-down and single click Update button." (Points to the Status dropdown)
- Bottom Right:** "To see different party types, select the new party type from the drop-down and single click Update button." (Points to the Party 1 dropdown)
- Bottom Center:** "To show orders in a specific time-frame, select the quick link to This week, month, etc or type a begin and end date. Single left click the update button." (Points to the Quick Date Fill controls)
- Bottom Left:** "To sort by a different field, single click the heading at the top of the list." (Points to the 'File' column header)