

BAREIS MLS®

Check Your Contacts and Prospects in BAREIS Plus

1. On the Clarity dashboard, click on the **BAREIS Plus** icon.
2. From the top menu, click **Contacts** (1), then **Contacts and Prospects** (2) from the drop down.



3. On the **Contacts / Prospects** screen, for each contact, click on the link in the **Name** column. Prior to the **BAREIS Plus** launch, you printed your **Contact Report** as a PDF. Refer to that PDF to verify that all contact names, email address and any other contact information successfully transferred from BAREIS to BAREIS Plus.

Exports Options

Contacts/Prospects 5 contact(s) found in Prospects

Active Inactive (2)

Create New Contact Manage Newly Matched

Filters

Group Prospects (5)

Name	Prospect Cart*	Auto-Prospecting/Portal	AP/Portal Activity**	Phone
CP New Contact for Retest	4 0 0 0	Invitation Sent 7/17/2020	None	
Kathryn J Childs-Binare (972921)	0 0 0 0			
Kimberly	1 0 0 0	Invitation Sent 10/30/2020	10/30/2020 1:59 PM	
Ryan M	17 1 0 0	Invitation Sent 8/11/2020	10/8/2020 10:10 AM	
testor	6 0 0 0	Invitation Sent 9/23/2020	None	

*Prospect Cart counters: Newly Matched Listings / Agent Recommended / Saved Listings / Rejected Listings
 **AP/Portal Activity column shows date/time of last activity: Green = 0-6 days / Yellow = 7-30 days / Red = 31+ days

Modify Contact Information

Change fields to modify contact information

Contact Information

*Contact Name: M Ryan | Status: Active | Type: Buyer

Manage as Prospect:

Name on Reports:

Company Name:

Street Address:

City State ZIP+4: Ryan, M

Display as: Prospects

*Groups:

*E-mail: mni2@comcast.net

Cc:

Alternate E-mail:

Web Page:

Primary Phone: Extension: Type:

Secondary Phone: Extension: Type:

Other Phone 1: Extension: Type:

Other Phone 2: Extension: Type:

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Contact Report		
Prospects as of 12/09/20 at 1:16pm Page 1		
Contact Name: Betty Boop	Type: Buyer	Status: Active
Company Name:		
Street Address:	Groups: Clients	
Contact Phone:	E-Mail Address: kasey@norcalmls.com	
Business Phone:	CC:	
Addl Phone 1:	Web Page:	
Addl Phone 2:	Alt E-Mail:	
Birth Date:	Closing Date:	
Search Criteria: Property Type: Residential Include Property Subtypes: Single Family Residence, 2 Houses on Lot Transaction Type: Sale County: Marin City: San Rafael Statuses: Coming Soon, Active Price: 900,000 to 1,200,000		
Contact Name: New Contact for Retest CP	Type: Buyer	Status: Active
Company Name:		
Street Address:	Groups: Prospects	
Contact Phone:	E-Mail Address: kasey@norcalmls.com	
Business Phone:	CC:	
Addl Phone 1:	Web Page:	
Addl Phone 2:	Alt E-Mail:	
Birth Date:	Closing Date:	
Search Criteria: Property Type: Residential Include Property Subtypes: Single Family Residence, 2 Houses on Lot Transaction Type: Sale County: Marin City: San Rafael Statuses: Coming Soon, Active Price: 1,000,000 to 1,200,000		
Search Criteria: Bathrooms 2.00 or more Bedrooms 3.00 or more Map Draw 2 Shupes Price \$450,000 to \$550,000 Property Type RESI Statuses Coming Soon, Active Transaction Type Sale		
Contact Name: Kathryn J Childs-Briere (972921)	Type: Buyer	Status: Active
Company Name:		
Street Address: 4799 Nicasio Valley Rd., Nicasio, CA 94946	Groups: Prospects	
Contact Phone: Primary	E-Mail Address: kasey8868@gmail.com	
Business Phone: Primary	CC:	
Addl Phone 1:	Web Page:	
Addl Phone 2:	Alt E-Mail:	
Birth Date: Jan 1 1800 12:	Closing Date:	

4. For each contact, on the **Modify Contact Information** screen, scroll down to the **Auto-Prospecting** section under Prospect Options. If any contacts were set up for Auto-Prospecting, check that all settings are correct.

Modify Contact Information

Prospect Options

Auto-Prospecting

Send E-mail to Agent

Send E-mail to Prospect

Send E-mail to Cc

E-mail Report Format

Scheduled Auto-Prospecting [Modify Auto-Prospecting Frequency](#)

Client Portal

Reverse Prospecting

5. For each contact, on the **Modify Contact Information** screen, scroll down to the **Prospect Searches** section. If any contacts have saved searches, for each search:

- a. Verify that each Prospect Search has the **box checked (1)** in the On/Off column.
- b. Click on the **View Criteria link (2)** in the **Search Options** section. Compare the criteria against the list from your previous report. You may notice a search needs correction if it included a field that has **changed in the new BAREIS Plus system**. Click **Revise Criteria (3)** to update the criteria as needed.

Prospect Searches					
On/Off	Sort	Name	Search Type	Search Options	
<input checked="" type="checkbox"/>	0	Loma Verde	Map	<input type="button" value="Run"/>	<input type="button" value="Revise Criteria"/> <input type="button" value="View Criteria"/>
<input checked="" type="checkbox"/>	0	Loma Verde	Map	<input type="button" value="Run"/>	<input type="button" value="Revise Criteria"/> <input type="button" value="View Criteria"/>

1
3
2