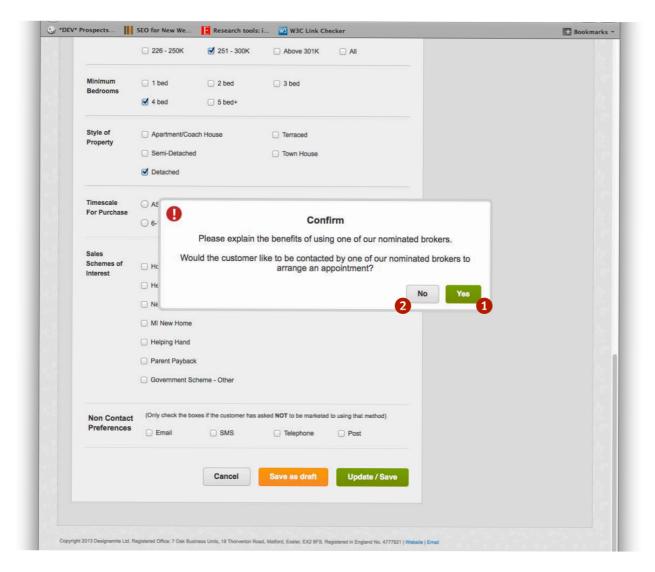
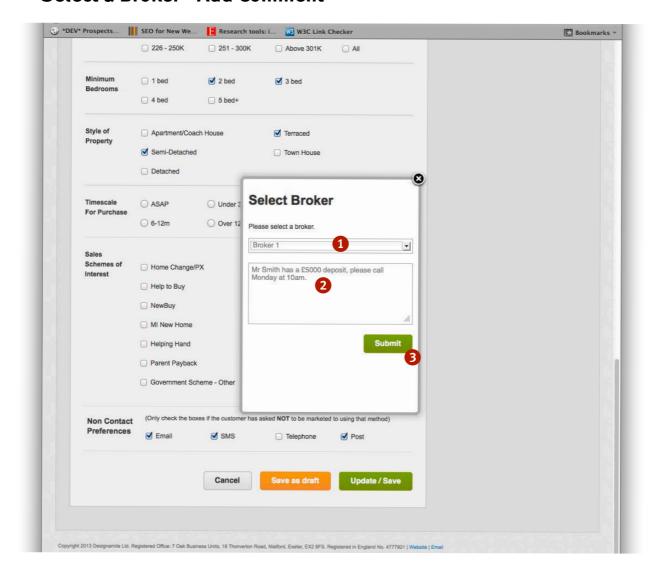
## Select a Broker - Alert



When a prospect 'Visits or Revisits' you will be asked to explain the benefits of using a Broker.

- 1 Select 'Yes' if the prospect would like to use a broker.
- 2 Select 'No' if the prospect does not want to use a broker.

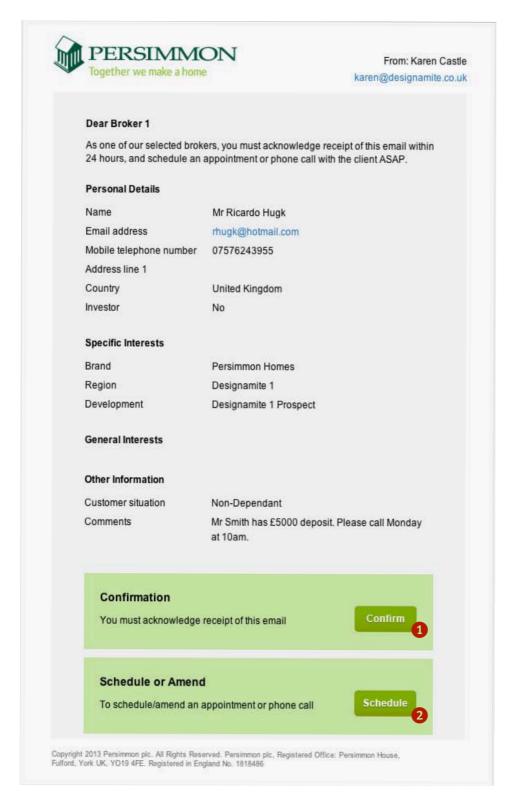
## **Select a Broker - Add Comment**



If you select 'Yes', you must select a Broker from the drop down list.

- Select a Broker.
- Add Comment this comment is included in the email sent to the broker.
- Press Submit.

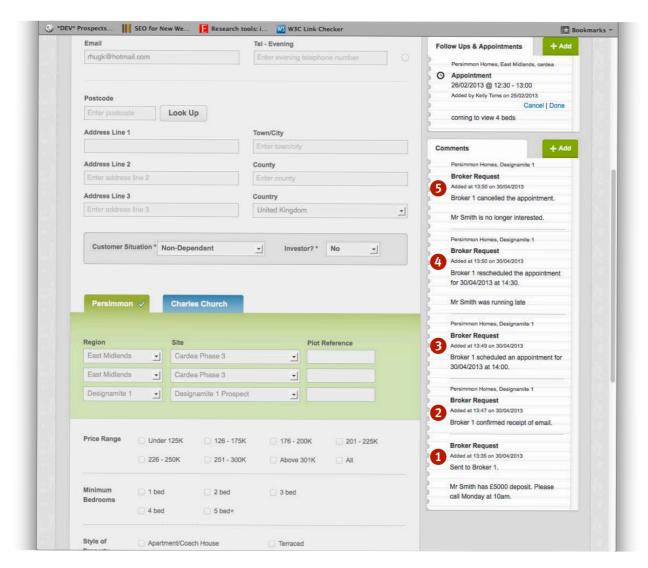
## Select a Broker - Brokers Email



The Broker will receive an email, similar to above, containing the prospects details.

- 1 The Broker must select 'Confirm' to acknowledge receipt of the email.
- 2 The Broker must select 'Schedule' to schedule or amend an appointment or phone call.

## **Select a Broker - Broker Comments**



Broker details are captured in the 'Comments' section, along with any actions/comments from the Broker. This is an example of how it could look should a Broker have to reschedule or cancel an appointment.

- 1 Your comments.
- 2 Broker's Confirmation (Receipt of Email).
- 3 Broker Schedules an Appointment/Follow Up Call.
- 4 Broker Reschedules an Appointment/Follow Up Call.
- 5 Broker Cancels an Appointment/Follow Up Call.