



What can Sparky do?

1. Sending information

- **Text – (716) 221-8028**
 - Text and pictures
- **Email – sparky@fieldnotes.ai**
 - Text
 - Excel or CSV files
 - Purchase agreements – PDF
 - Contact file (VCF files)

2. Add/update contacts

- **Always start with contact's name**
- **Add as much information about the client** - ex. "Fred's spouse is ..."
- **Add information to track your opportunity** – ex. "Fred is a warm lead from Zillow"

Tips

1. Manage Your Business – track your opportunities

- **Sphere of Influence:** Prospect, Lead, Client, Agent, etc
- **Stage Readiness:** Cold, Warm, Hot, Under Contract, Sold
- **Referral Source:** Zillow, Online, FSOB, Friends & Family, etc
- Review the fields in Field Notes for more options to categorize your business

2. Customer Profile – understanding your customer

- **Client contact:** phone, email, pref. communication
- **Spouse/partner:** name, phone, email
- **Family profile:** kids and pets
- **Buying profile:** buyer/seller, goals, budget, neighborhood

3. To learn more about what Sparky can do for you:

- a. Review our support page regularly:
www.fieldnotes.ai/support/
- b. Subscribe to Sparky's newsletters
- c. Reach out to your Customer Success Manager:
support@fieldnotes.ai or 425.577.7833

What can Sparky do?

3. **Add/update tasks or appointments**
 - “Remind me...”
 - “Schedule....”
 - “Next steps....”
 - **Assigning to a team member –**
“Assign Fred to do ... next Monday”

Putting it all together...

“Sparky. I just met with Alicia Johnson from Zillow. She is a hot lead looking to buy a house at the end of the month. Her budget is \$800,000. She is looking at the Renton area.

Her husband is Jeff. They are looking for a house to start their family

Remind me to send a thank you card by next Monday”