

## My Fresh Prospects CRM | Printing Letters Guide

### **Arrive Monday – Friday by 10a EST (extremely time sensitive)**

**STEP 1** – Look for the Fresh Prospects icon located on the top left side of your screen and click on it. This will pull up your Fresh Prospects for the day.

**STEP 2** – Toward the top right you will notice a drop down menu, select ‘Print Letters (Active).’

**STEP 3** – Select ‘Print’ to the right of your specified letter. (ask your account manager for the correct letter to print)

**STEP 4** – At the dialog box ‘PLEASE BE PATIENT WHILE YOUR LABELS ARE PRINTING. PLEASE ALLOW UP TO 90 SECONDS.’ Select the green ‘Print’ button.

**STEP 5** – Your Browser will redirect in approximately 5 seconds and render a document with your Fresh Prospects in the selected letter format.

**STEP 6** – If applicable go to your chosen printer and replace the paper with how many sheets you have pages of letter shells. (Skip this step if not using shells.)

**STEP 7** – Once your page(s) of letters appear, select ‘Print’ from your drop down menu. (This varies depending on browser and operating system.)

**STEP 8** – Fold and insert the letter into a blank, left-window envelope. (Make sure there is no return address or logo.)

**IMPORTANT** – Due to FCRA guidelines, Daily Fresh Prospects will be rerouted to the inactive tab at midnight the day of print.

**NOTE** – Infinite mode allows you to scroll continuously to view all leads in a campaign. Alternatively, you may use our date range selection tool by clicking the blue clock on the far right side and then selecting today's and tomorrow's date.