

## My Fresh Prospects CRM | Printing Follow-up 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** – On the right side, midway down the page, you will notice a dropdown menu, select ‘Print Letters (Active).’

**STEP 3** – Select ‘Print’ to the right of ‘Follow-up Letter Front.’

**STEP 4** – At the confirmation window ‘PLEASE BE PATIENT WHILE YOUR LETTERS ARE PRINTING. PLEASE ALLOW UP TO 90 SECONDS.’ Select the ‘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 step if not using shells.)

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

**STEP 8** – Once the front is finished, reload the paper into the printer. You will now need to print the back of the letter.

**STEP 9** – Follow steps 1-6, but instead choose the ‘Follow-up Letter Disclaimer’ and print on the back of the Follow-up Letters.

**STEP 10** – Fold and insert the letter into a blank, left-window envelope. (Make sure there is no return address or logo.)

**IMPORTANT** – FCRA guidelines require disclaimer to be present. Failure to comply can result in a \$10,000 fine per marketed prospect.