3. Managing Contact Records

Your **CRM** stores detailed records for each lead, including:

- **Contact Information:** Name, phone number, email address, etc.
- **Lead Source:** Identify **FinanceVine** as the source for accurate tracking (we can do this for you during the onboarding process).
- **Interaction History:** Log every interaction, including calls, emails, and text messages.
- **Notes:** Record important details about the lead's needs, preferences, and concerns or any other rapport-building details (someone's favorite sports team, a child's name, etc)
- **Documents:** Store relevant documents, such as applications or financial statements, securely.

Having this information *readily* available ensures personalized communication and efficient follow-up.