Software

## How to handle Internet Leads

Leads represent the first step in a sales process and are online contacts interested in your products or services, such as buy, sell and/or rent properties.

When accessing the application, it is possible to verify the existence of pending leads. Pending leads are shown as a numeric reference in the 'Leads' tab, next to the name. This tab lists all contacts automatically received online (visit request, more information request, etc.)

Eind on	portunities						
Find op	portunities						
(Referen	ice, Potencial client, Obse	rvations, Ex	tra fields				
or advanc	ed search						
1. Onnertru	nities, tags a, recently up	datad					
1 Opportu	nities, tags a, recently up	dated.					
Show Re	cently updated	<u>.</u>					
Select A	dd a tag Email Print Delei	e Mare					
(							
	Listing, ANG_9						
	Sofia Custodio, 08 Mar					$\geq$	Property Doc
e					**********		and services
	Owner: Julie Bush				and the second se	Apartment 2 Room	_
	hone: (44) 02455774100 imail: juliebush@hotmail.	en uk		-	Sec. 1 of a second second	Trafford, Greater I Availability: Availab	
	anan, junebush@nounan.	CO.UK				For sale: £400.000	
						FOF SALE. £400,000	
3	ags: A , Opportunity Won	edit					
	dd a tag Email Print Delei						

Reports: Create report, Summary of opportunities

To properly handle a lead, take the following steps:

**1.** Click on a lead, which will redirect you to the lead form for editing. The application automatically verifies if the potential customer is an existing contact in the database;

Opportunit	ies Properties Contacts Tas	ks 1 Leads 5	Holiday homes 🕨 Marke	eting 🕨 Mana
				P
€	Edit lead of sale, Lauren			
	Add new opportunity of: For sa	le 🗾		
▼ Conta	acts			
	Pote	ntial client		
	Laure	en		
	No p	eople or companie	es match that name.	
	Crea	ate a new person o	or create a new company wi	th that name.
	🕀 Add	lanother		

**2.** If the potential customer is not an existing contact, a pop-up message will appear asking if the intention is to create a new person or company;

Opportunitie	Edit lead of sale, Laure		age We Promot
€	Add new opportunity of	For sale	
▼ Contact	ts		
	1	Potential client	
	<b>–</b> <	Lauren No people or companies match that name. Create a new person or create a new company with that name.	or Ca
		Add another	
▼ Genera	l info		

**3.** All contact information previously given by the potential customer are shown on the right sidebar. Use this information to complete the contact form with general info and preferences (location, price, number of beds, business deal, areas, etc.);

Leads 5 Holiday homes Marketing	Manage Website			
	Promote to opportunity	Cancel	Is this a duplica If so, you can me	te? rge this lead with t
<u> </u>			💼 Delete this opp	ortunity
			Original contact in	formation Misit Re
		- (	Name: Lauren	)
lient			Email: wFZyZjDHa	
	or Cancel	_	Phone: yMgmdDXI	JyyLr
or companies match that name.				
w person or create a new company with th	at name.		Property chosen	
				Chalet, Dream
r			tail	Belfast, Norther Ireland
				Availability: Avail
				Rental vacation: From 01/06/201: night

4. Then, choose who is responsible for the lead and set who can see the lead;

Type	Visit Request	
Lead origin	Internet 🔄	
Lead sub origin	(Sub origin ) 💽 Manage	
Who's responsible	Tania Santos 💌	
Who's co-responsible	(All users )	
Country	United Kingdom	
Target price		
Extra fields		manage extra field
Who can see this lead		
Everyone     Only me		

**5.** Finally, click the **'Promote to opportunity**' button. This will automatically transfer the lead to the **'Opportunities**' tab. Once a lead is considered an opportunity, all monitoring and necessary actions are then done in this tab.

Description		
Туре	Visit Request	
Lead origin	Internet	
Lead sub origin	(Sub origin) 💽 Manage	
Who's responsible	Tania Santos 💌	
Who's co-responsible	(All users )	
Country	United Kingdom 💌	
Target price		
Extra fields		manage extra field
Who can see this lead		
<ul> <li>Everyone</li> <li>Only me</li> </ul>		
Me and plus		
<u> </u>		
		Promote to opportunity Cance

Learn more at: <u>http://academy.egorealestate.com</u>

**Questions:** <u>support@egorealestate.com</u>