

### Step 9: How to handle Internet Leads

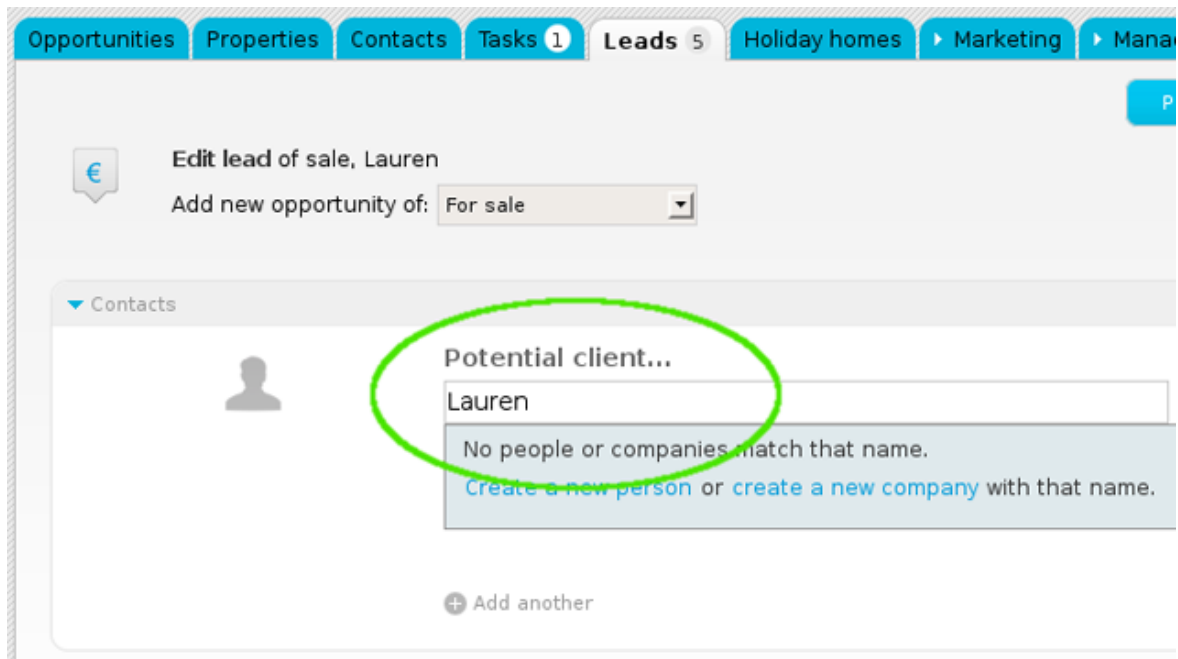
Leads represent the first step in a sales process and are online contacts interested in your products or services, such as buy, sell and/or rent properties.

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.)

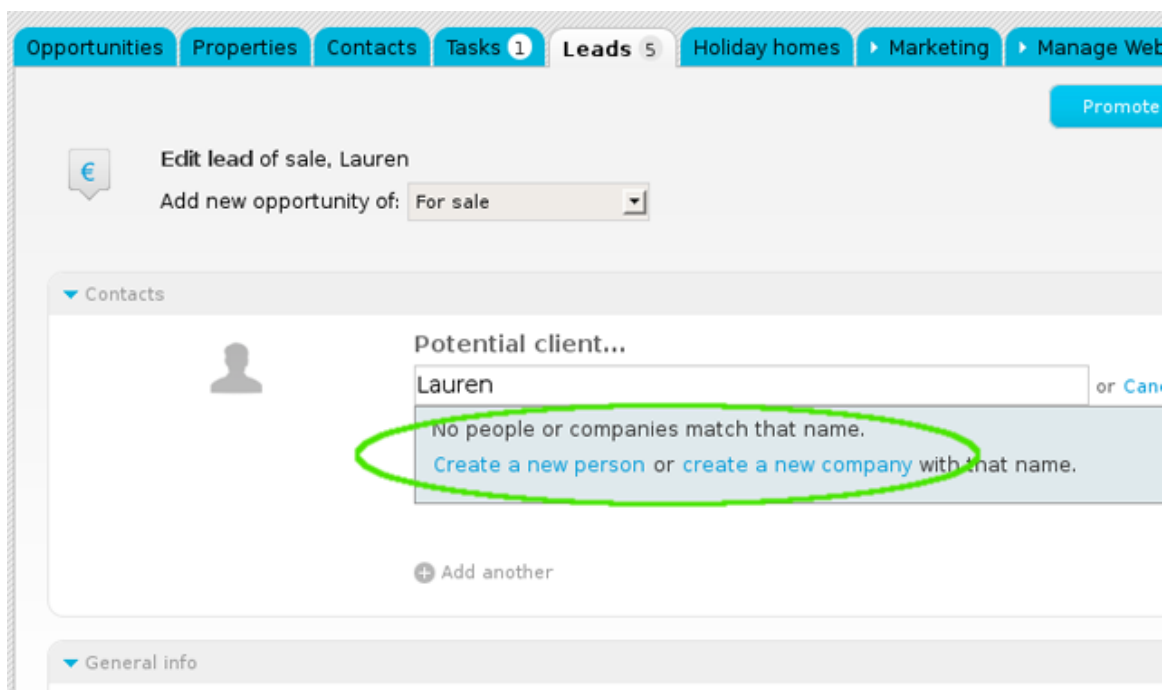
The screenshot shows the eGO Academy application interface. At the top, there is a navigation menu with tabs: Opportunities, Properties, Contacts, Tasks (1), Leads (5), Holiday homes, Marketing, and Manage Web. The 'Leads' tab is highlighted with a green circle. Below the navigation menu, there is a search bar with the text '( Reference, Potential client, Observations, Extra fields )' and a link to 'advanced search ...'. Below the search bar, there is a message: '1 Opportunities, tags a, recently updated.' Below this message, there is a 'Show' dropdown menu set to 'Recently updated'. Below the dropdown menu, there is a 'Select' button and a list of actions: 'Add a tag', 'Email', 'Print', 'Delete', and 'More'. Below the 'Select' button, there is a list of opportunities. The first opportunity is 'Listing, ANG\_9' with a checkbox. Below the title, there is a date: 'Sofia Custodio, 08 Mar'. Below the date, there is a currency symbol '€'. Below the currency symbol, there is contact information: 'Owner: Julie Bush', 'Phone: (44) 02455774100', and 'Email: juliebush@hotmail.co.uk'. Below the contact information, there is a photo of an apartment. Below the photo, there is property information: 'Apartment 2 Rooms, APA\_08', 'Trafford, Greater Manchester, North', 'Availability: Available', and 'For sale: £400,000'. Below the property information, there is a 'Tags' section: 'Tags: A . Opportunity Won edit'. Below the 'Tags' section, there is a 'Select' button and a list of actions: 'Add a tag', 'Email', 'Print', 'Delete', and 'More'. At the bottom of the page, there is a 'Reports' section with a link to 'Create report, Summary of opportunities'.

To properly handle a lead, take the following steps:

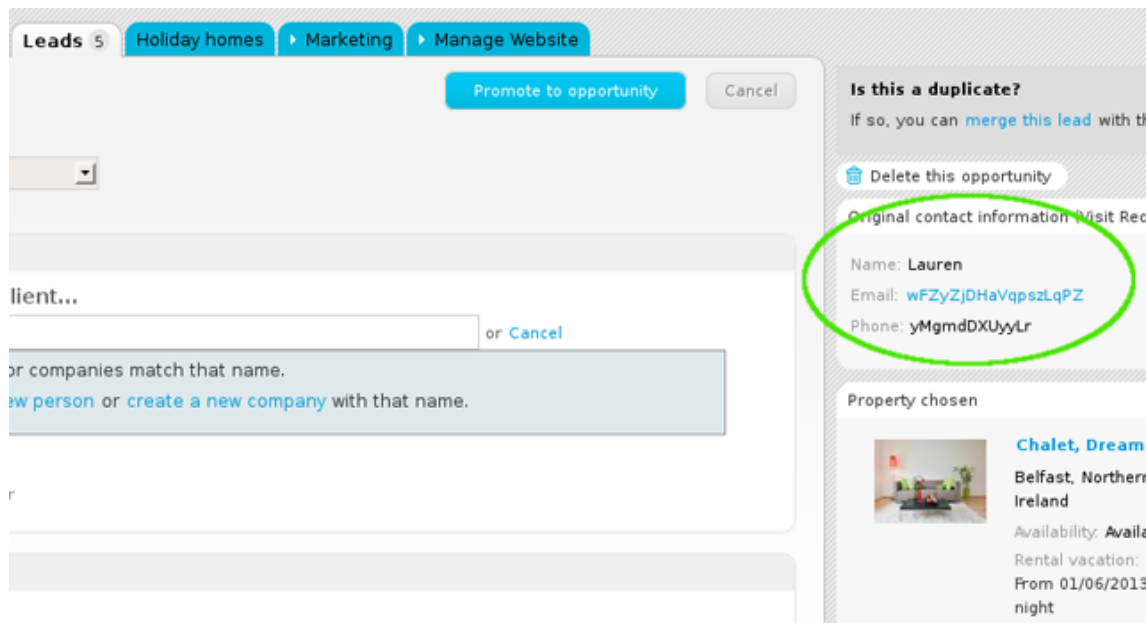
1. Click on a lead, which will redirect you to the lead form for editing. The application automatically verifies if the potential customer is an existing contact in the database;



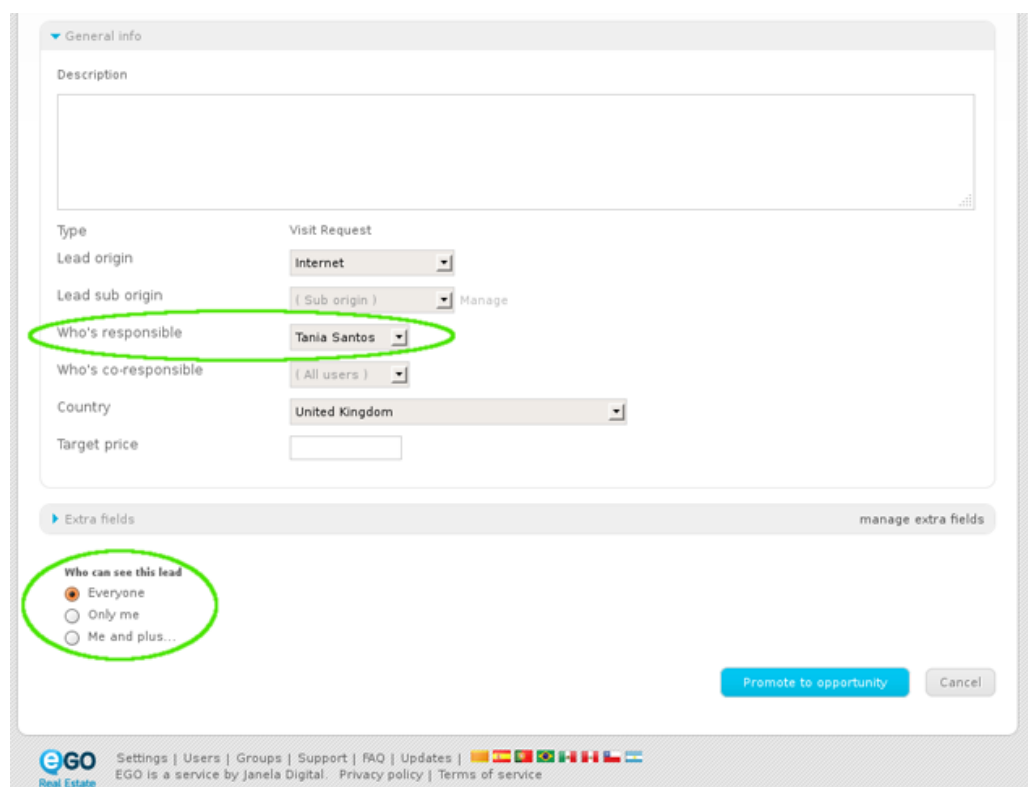
2. If the potential customer is not an existing contact, a pop-up message will appear asking if the intention is to create a new person or company;



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.);



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



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.

General info

Description

Type

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: [input field]

Extra fields manage extra fields

Who can see this lead

Everyone

Only me

Me and plus...

**Promote to opportunity** Cancel

EGO Real Estate | Settings | Users | Groups | Support | FAQ | Updates | flags | EGO is a service by Janela Digital. Privacy policy | Terms of service

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Questions: [support@egorealestate.com](mailto:support@egorealestate.com)