

How Leads are distributed

Leads identify a person or entity interested in purchasing a product or service, such as to buy, sell and/or rent properties.

Leads received from contact forms may be related to: visit and information requests concerning a property and/or looking for and list a property requests.

1. Leads are distributed the following way:

Visit and information requests concerning a property: By default it is always delivered to the broker, if the broker is an application user. Otherwise, it will be delivered to users with permissions to receive generic Leads.

Looking for and List a property requests: These requests are delivered to the user(s) with permissions to receive Leads. If there is more than one authorized user, the delivery will be made on a rotating basis, i.e., the first request will be delivered to User A, the second to User B and so on.

How to set user permissions to receive generic Leads: In the footer of the application, click the 'Users' option and in the 'Notifications' section of the user configuration, check '**Deliver leads/opportunities on your own responsibility**'.
Note: If the user wishes to receive a copy by e-mail, you should select '**Receive email notifications of leads/opportunities**';

▼ Notifications

- Receive email notifications of tasks
- Receive daily balance of tasks by email
- Deliver leads/opportunities on your own responsibility
- Deliver new proposals on your own responsibility
- Receive email notifications of leads/opportunities
- Receive daily balance of internet leads
- Show help
- Receive daily balance of tickets by email
- Receive email notifications of tickets
 - I also wish to be notified when receiving a reply/forward to tickets
- Receive new email notifications
- Receive email notifications of new property
- Receive email notifications of property availability updates (broker, salesman)
- Receive notification of availability changes "In Review" property by email
- Receive daily balance of blocked newsletter
- Receive email notifications of proposal status changed

If you want to receive notifications in another email that is not the login click to choose

2. If there are multiple users with authorization to receive generic Leads, rules can be created for delivery or exclusion, in the Overall settings of the application. And don't forget, in the delivery rules, the last one has to be generic, i.e., only the country should be filled in, without no other option. This way, leads that don't fit in the rules above won't be rejected.

To do so, take following steps:

Click the '**Settings**' option on the footer of the application. In the section '**Distribution of internet leads**', set the rules for delivery and exclusion of Leads, according to the available parameters. At last, click the '**Save**' button;

▼ Distribution of internet leads

Delivery

House For sale United Kingdom
 (Choose district) (Choose town) Choose number of bedrooms Sofia Custódio

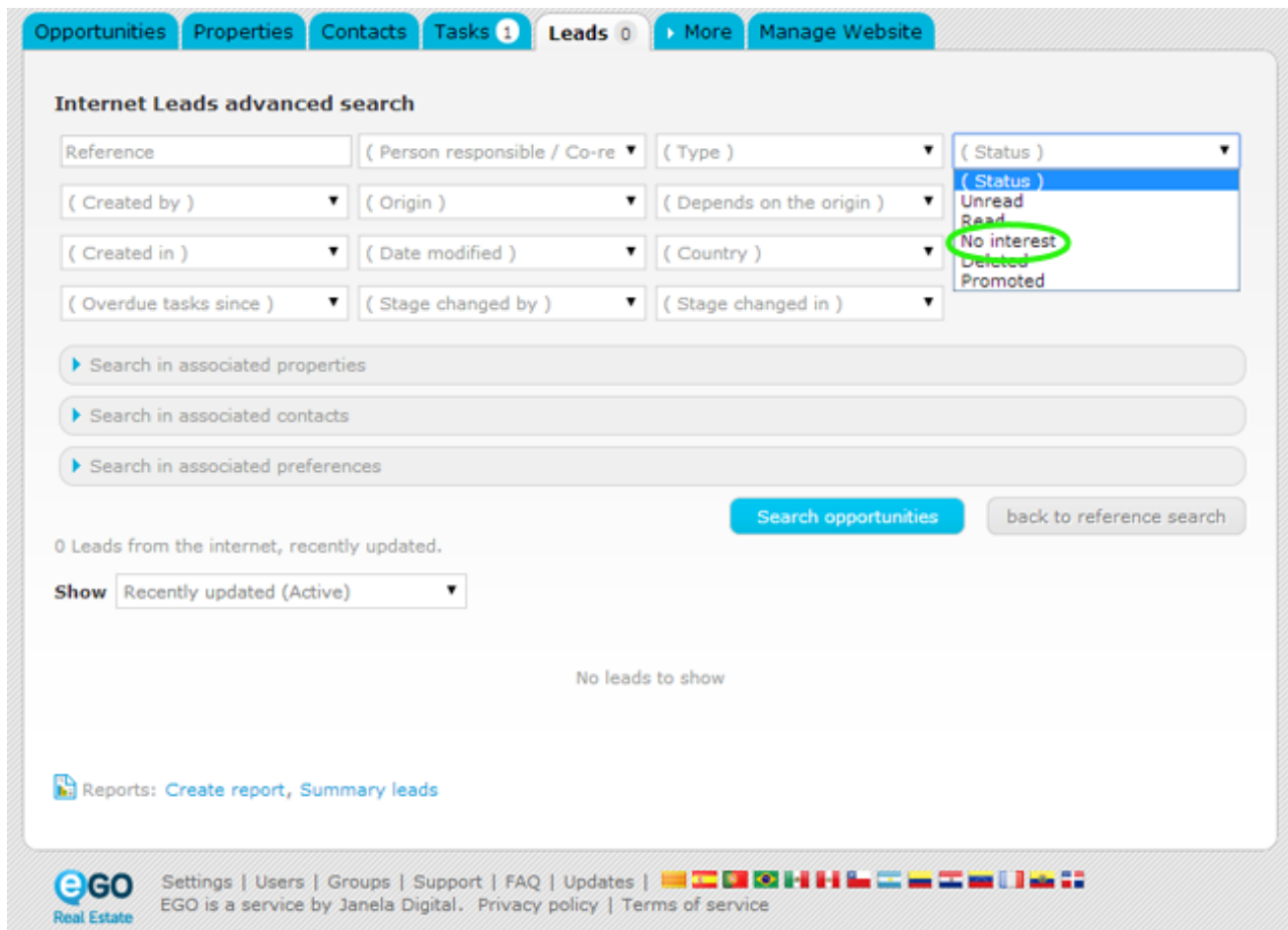
Apartment To rent (Choose country)
 (Choose district) (Choose town) Choose number of bedrooms Jessica Paquincha

Add another

Exclusion

Add exclusion

3. All Leads that are rejected by the rules, will be displayed in the 'Leads' tab in the folder '**No interest**'. To access this folder, just do an advanced search for Leads and filter the '**Status**' field;



Categorize Leads

Leads are filtered by eGO. Each lead is categorized as follows:

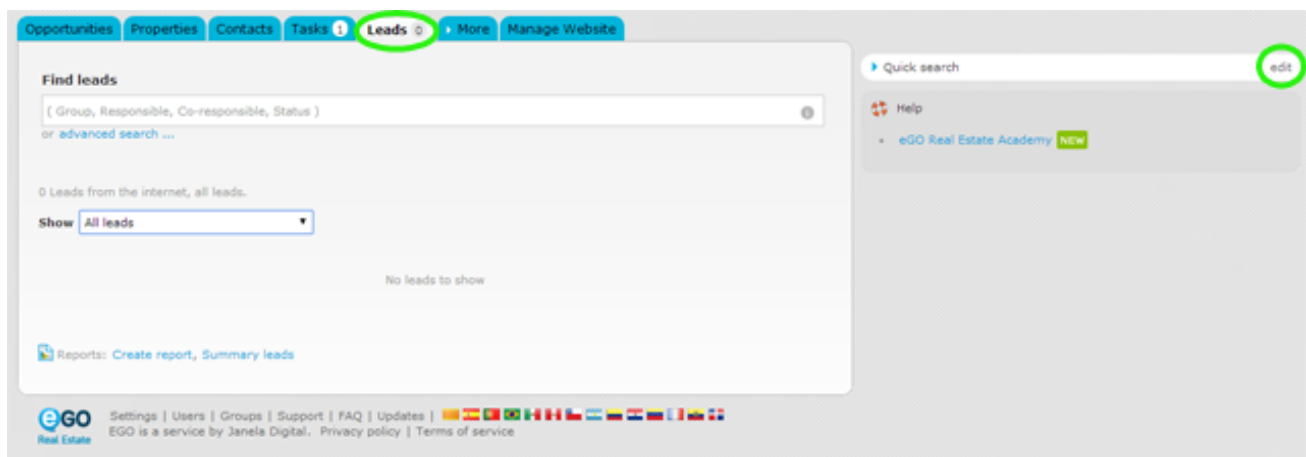
- If the Leads are valid, they will be directed to the main list in the '**Leads**' tab;
- If the Leads are invalid, i.e., blocked by the antispam, they will be directed to the list of '**No Interest**';

Quick Search for Leads

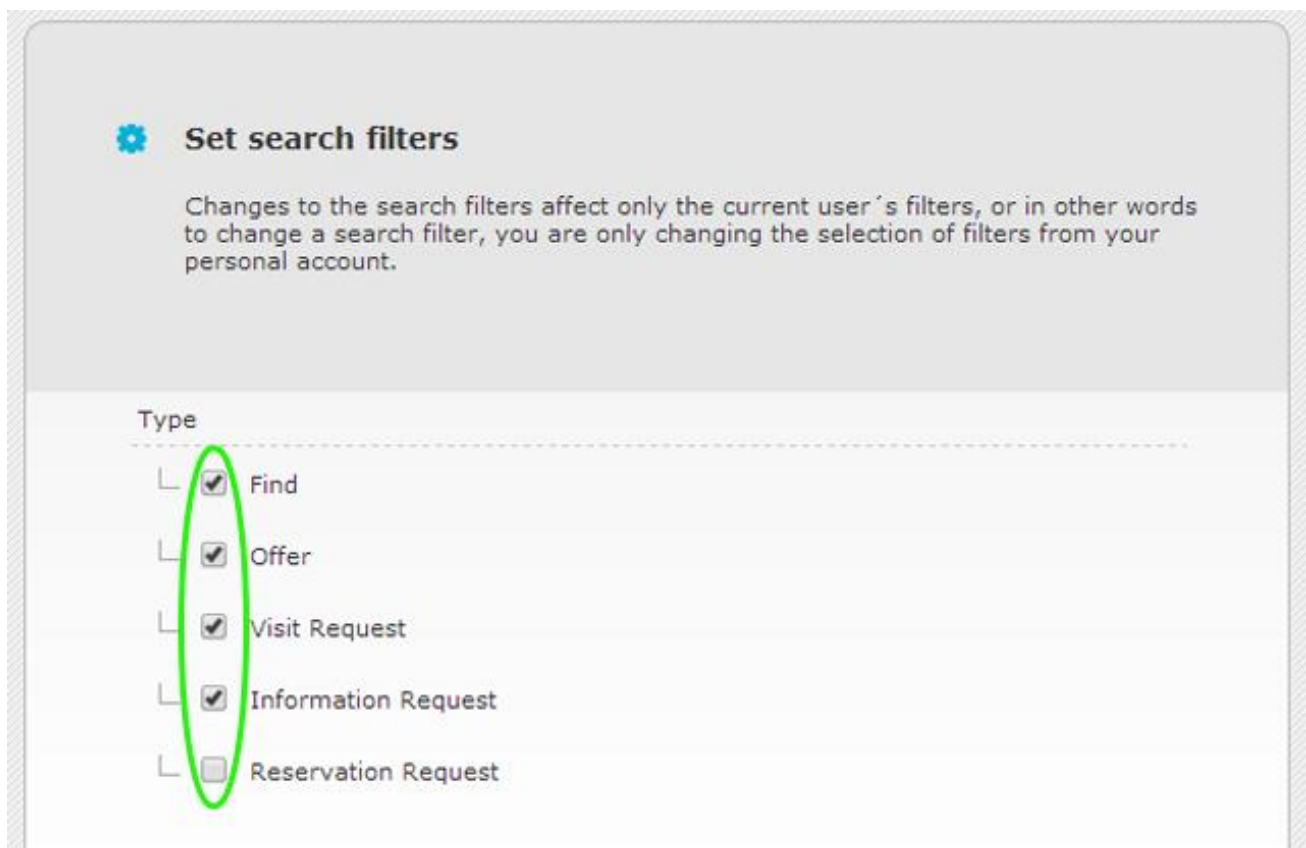
A quick and easy way to see the Leads is through the search filters.

To do so, take the following steps:

4. Access the 'Leads' tab, go to the Quick search and click 'Edit';



5. The user can define which fields will be included in the quick search. To do so, simply select the filter(s) you want to activate in each category;



6. Lastly, click 'Save changes';

Status

- Unread
- Read
- No interest
- Deleted
- Promoted

Created in

- Since today
- Since yesterday
- Last 3 days
- Last 7 days
- Last 30 days
- Last 90 days
- Last 6 months
- This year
- Last year

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7. When the settings of the quick search are all set, the user just has to click on the desired filters to see the Leads in a more organized way;

Opportunities Properties Contacts Tasks Leads More Manage Website

Find leads

[Group, Responsible, Co-responsible, Status]
or advanced search ...

0 Leads from the internet, all leads.

Show All leads

No leads to show

Reports: Create report, Summary leads

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Settings | Users | Groups | Support | FAQ | Updates | [Flags]

EGO is a service by Janela Digital. Privacy policy | Terms of service

Quick search: edit

Type: find | offer | visit request | information request

Stage: unread | read | no interest | deleted

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

Questions: support@egorealestate.com