

How to set Leads as valid or invalid and edit the quick search filters?

eGO users can determine which Leads are valid or invalid and edit the Quick search filters.


When you receive a Lead, eGO automatically categorizes it as follows:

- Valid Leads are moved to the main list on the '**Leads**' tab;
- Invalid Leads, which are in accordance with the exclusion rules settings, are automatically deleted by eGO;
- The Leads that do not fit any rule (delivery or exclusion), will be moved to '**No interest**';

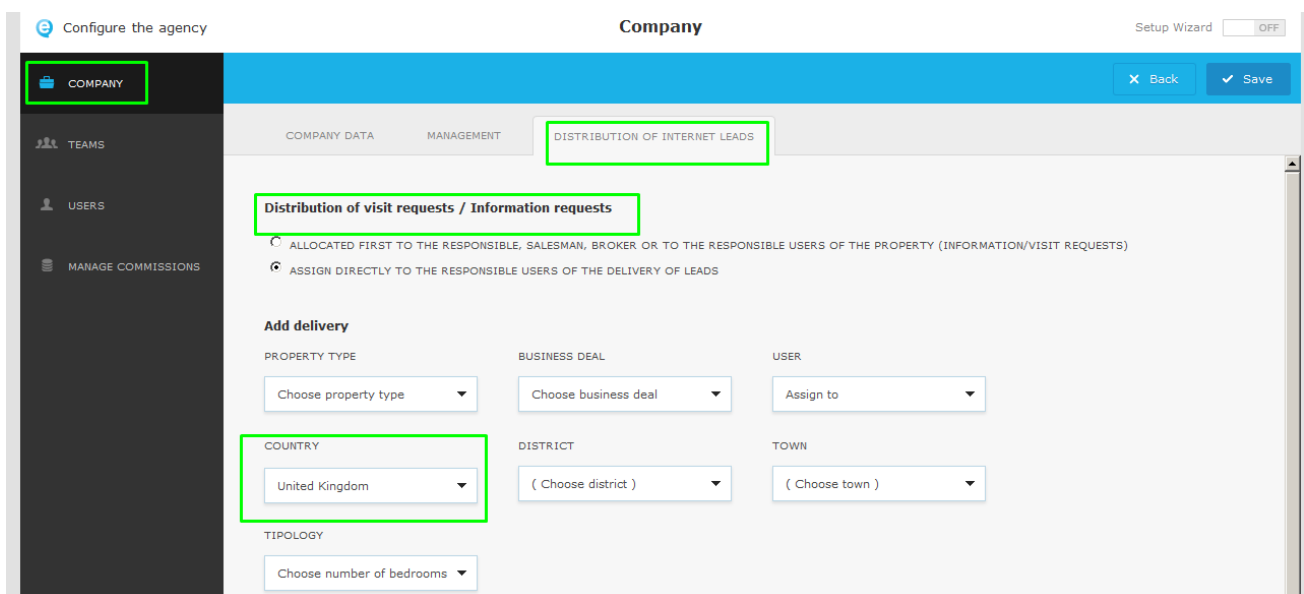
To set the rules of the Leads that are going to be valid, take the following steps:

1. Go to '**Settings**';



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

2. In the '**Distribution of internet leads**' section and on the '**Delivery**' category there is a default rule to receive all Leads coming from the United Kingdom;



The screenshot shows the 'Configure the agency' interface for a 'Company'. The 'COMPANY' menu is highlighted in the sidebar. The main content area is titled 'Distribution of internet leads' and contains the following settings:

- Distribution of visit requests / Information requests:**
 - ALLOCATED FIRST TO THE RESPONSIBLE, SALESMAN, BROKER OR TO THE RESPONSIBLE USERS OF THE PROPERTY (INFORMATION/VISIT REQUESTS)
 - ASSIGN DIRECTLY TO THE RESPONSIBLE USERS OF THE DELIVERY OF LEADS
- Add delivery:**
 - PROPERTY TYPE: Choose property type
 - BUSINESS DEAL: Choose business deal
 - USER: Assign to
 - COUNTRY: United Kingdom
 - DISTRICT: (Choose district)
 - TOWN: (Choose town)
 - TIPOLOGY: Choose number of bedrooms

3. To add new rules click 'Add another' and choose the options you want;

Configure the agency Company Setup Wizard OFF

COMPANY Back Save

COMPANY DATA MANAGEMENT **DISTRIBUTION OF INTERNET LEADS**

Distribution of visit requests / Information requests

ALLOCATED FIRST TO THE RESPONSIBLE, SALESMAN, BROKER OR TO THE RESPONSIBLE USERS OF THE PROPERTY (INFORMATION/VISIT REQUESTS)

ASSIGN DIRECTLY TO THE RESPONSIBLE USERS OF THE DELIVERY OF LEADS

Add delivery

PROPERTY TYPE: Choose property type

BUSINESS DEAL: Choose business deal

USER: Assign to

COUNTRY: United Kingdom

DISTRICT: (Choose district)

TOWN: (Choose town)

TIPOLOGY: Choose number of bedrooms

[Add another](#)

Example: If you want your employee (Vasco Neves) only to receive the Leads related to apartments for sale in Essex, you should choose the following options:

- **Choose property type -> Apartment**
- **Choose business deal -> For sale**
- **Choose country -> UK**
- **Choose district -> Essex**
- **Assign to -> Vasco Neves**

Configure the agency Company Setup Wizard OFF

COMPANY Back Save

COMPANY DATA MANAGEMENT **DISTRIBUTION OF INTERNET LEADS**

Distribution of visit requests / Information requests

ALLOCATED FIRST TO THE RESPONSIBLE, SALESMAN, BROKER OR TO THE RESPONSIBLE USERS OF THE PROPERTY (INFORMATION/VISIT REQUESTS)

ASSIGN DIRECTLY TO THE RESPONSIBLE USERS OF THE DELIVERY OF LEADS

Add delivery

PROPERTY TYPE: Apartment

BUSINESS DEAL: For sale

USER: Vasco Neves

COUNTRY: United Kingdom

DISTRICT: Essex

TOWN: (Choose town)

TIPOLOGY: Choose number of bedrooms

[Add another](#)

To define the Leads that are going to be invalid/no interest, take the following steps:

4. In the '**Distribution of internet leads**' section, scroll down to '**Add exclusion**', and choose the fields you want to create the exclusion rule;

The screenshot shows a web interface for configuring internet leads. On the left is a dark sidebar with 'USERS' and 'MANAGE COMMISSIONS' menu items. The main area is titled 'Distribution of internet leads' and contains several dropdown menus: 'Choose property type', 'Choose business deal', 'Assign to', 'COUNTRY (Choose country)', 'DISTRICT (Choose district)', 'TOWN (Choose town)', and 'TIPOLOGY (Choose number of bedrooms)'. Below these is an 'Add another' link and a green-bordered box containing an 'Add exclusion' button and a duplicate set of the same dropdown menus.

Note:

- All the Leads that do not match either the delivery or the exclusion rules will be considered '**No interest**'.
- All the Leads that follow the exclusion rules will automatically be deleted.

5. After creating the delivery and exclusion rules click '**Save**';

The screenshot shows the 'Company' configuration page. The top bar includes 'Configure the agency', 'Company', and 'Setup Wizard OFF'. The sidebar has 'COMPANY', 'TEAMS', 'USERS', and 'MANAGE COMMISSIONS'. The main area has tabs for 'COMPANY DATA', 'MANAGEMENT', and 'DISTRIBUTION OF INTERNET LEADS'. The 'DISTRIBUTION OF INTERNET LEADS' tab is active, showing the same dropdown menus as in the previous screenshot. A green box highlights the 'Save' button in the top right corner.

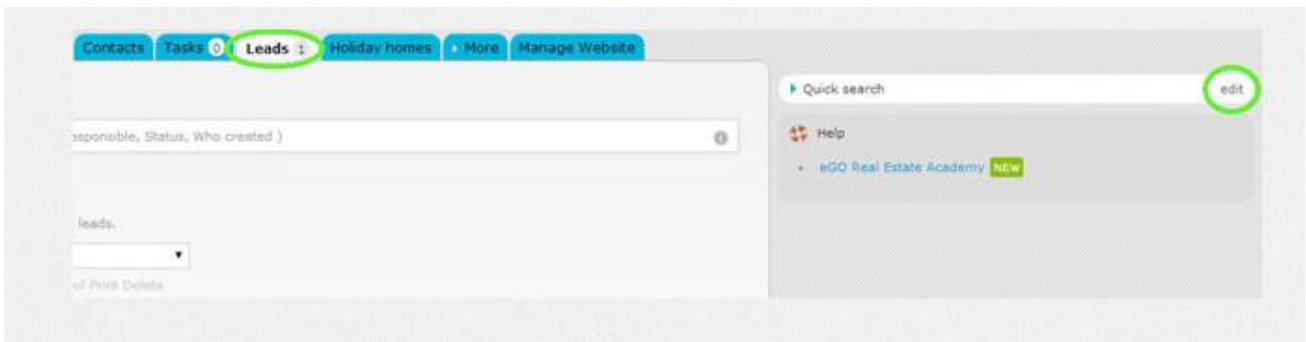
You can use **Quick search filters** to view the leads easily.

Search filters allow you to filter the Leads that you are looking for, example:

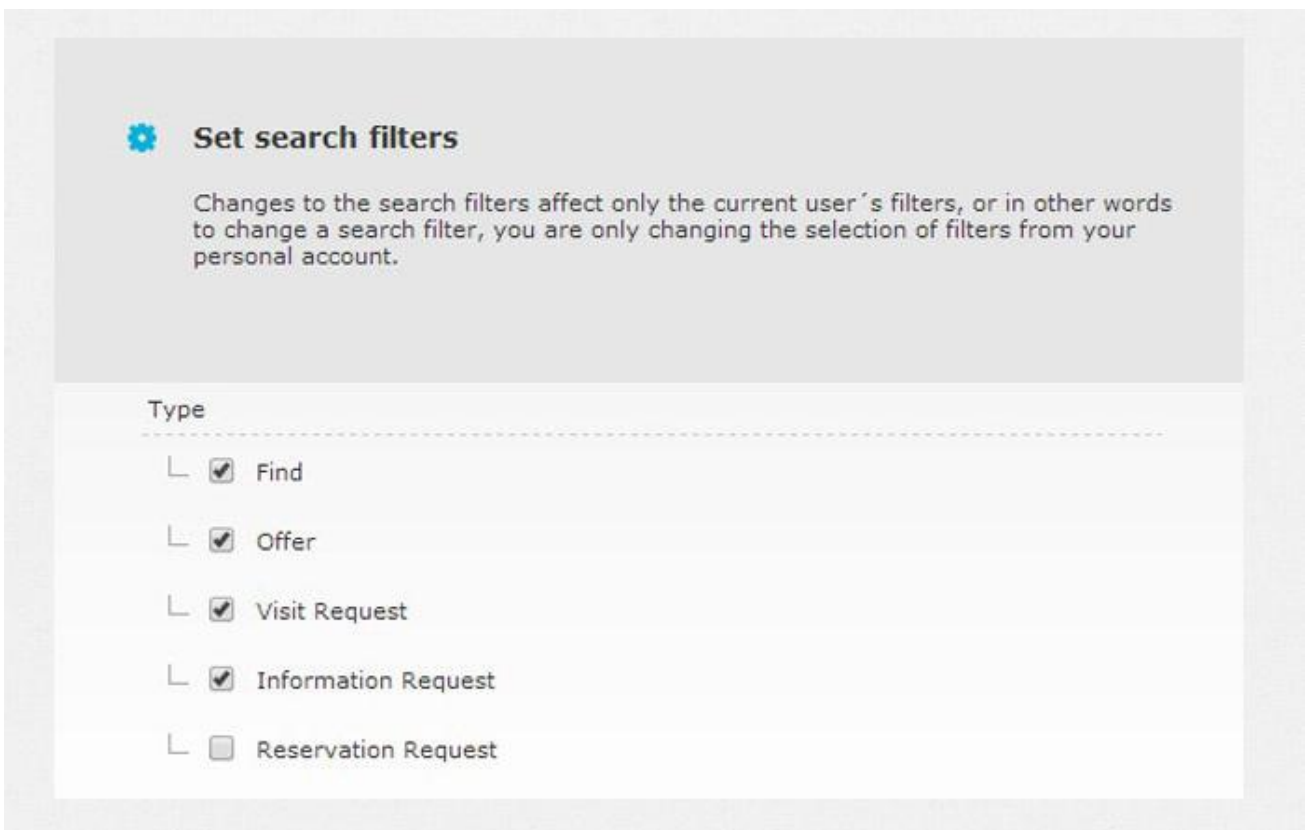
- If you select the '**Visit request**' filter, you will see all the visit request Leads;
- If you select the '**Last 3 days**' filter, you will see all the Leads that arrived in the last 3 days;

To add quick search filters, take the following steps:

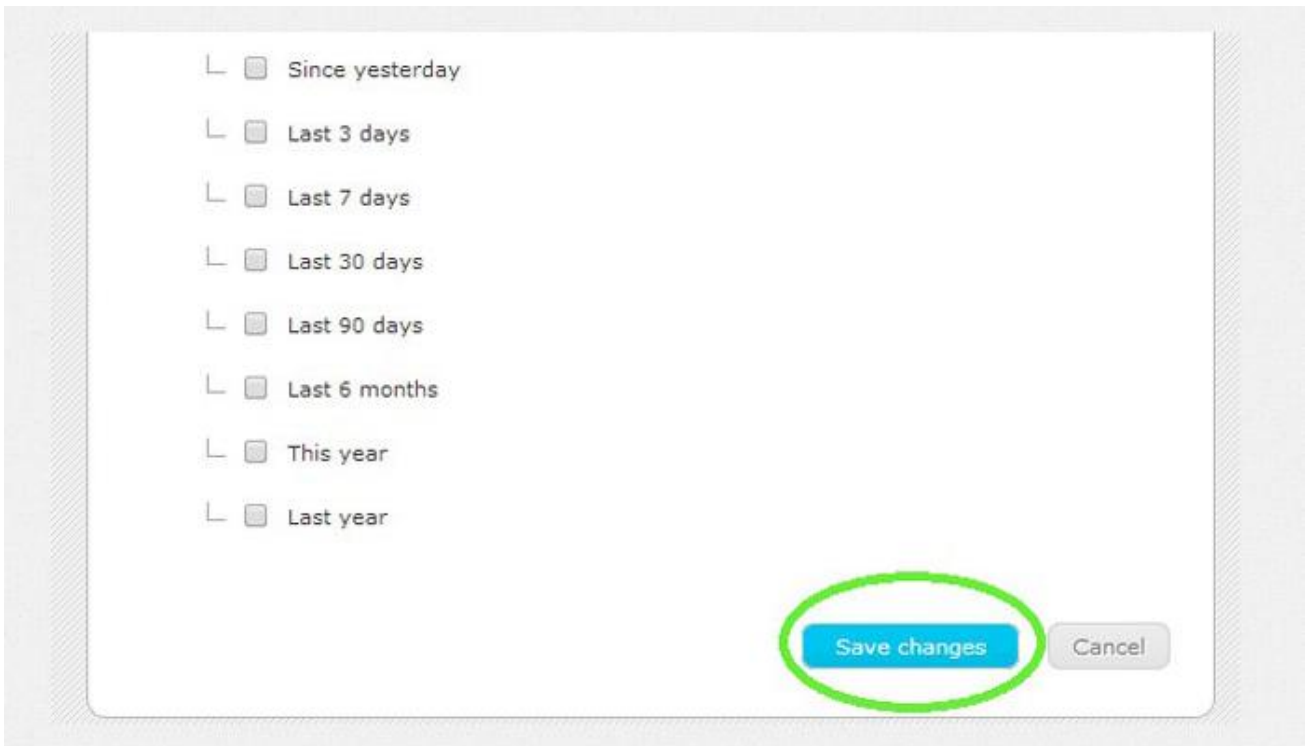
1. Go to the '**Leads**' tab and click '**Edit**' on '**Quick search**';



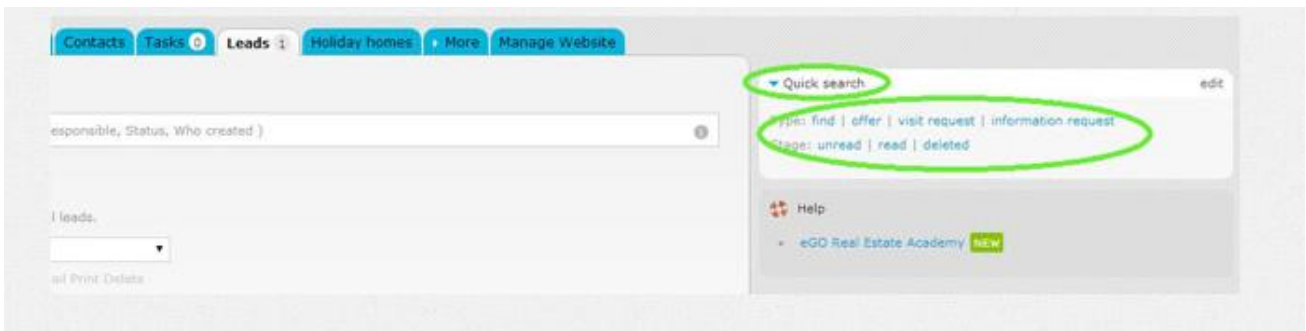
2. Select the filters you want to activate;



3. After selecting the filters you want, click **'Save changes'**;



4. After this quick search filter configuration, you just have to click one of the filters to view the Leads you want.



Note: The Leads that do not fit the delivery/exclusion rules will only be visible when selecting the **'No interest'** filter.

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

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