



### How are Leads distributed?

The eGO manager can set the distribution rules of the Leads that come from the internet.

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When someone (Potential client) fills in an online form saying they are interested in purchasing a product or service, such as to buy, sell and/or rent properties, you receive a Lead.

These Leads can be:

- Property finding forms;
- Property offer forms;
- Visit requests;
- Information requests;
- Reservation requests;

To make the Leads distribution easier, you can create delivery rules for the Leads. You can choose a person (or more than one) to be in charge of receiving and promoting the Leads to opportunities.

There are **two different methods** of distributing Leads:

- **Method 1.** The Lead is delivered in a specific predetermined order.
- **Method 2.** If there is more than one authorized user, the Lead is delivered on a rotation basis.

## How to activate the delivery methods?


**Method 1.** The Lead is delivered in a specific predetermined order.


1. When receiving a Lead, eGO checks if the property has a **person responsible** and delivers the Lead to him;
2. If there is no one responsible for that property, eGO checks if there is an associated **Salesman** and delivers him that Lead;
3. If the property has neither a person responsible, nor a Salesman, eGO checks if the property has an associated **broker** and delivers him the Lead.
4. If none of the options above work, eGO checks who are the users that can receive Leads and randomly delivers it.


**Note:** If the broker or the salesman are not eGO users, the rules above will not be applied.

▼ Contacts

Person responsible ( All users ) ▼

Owner 

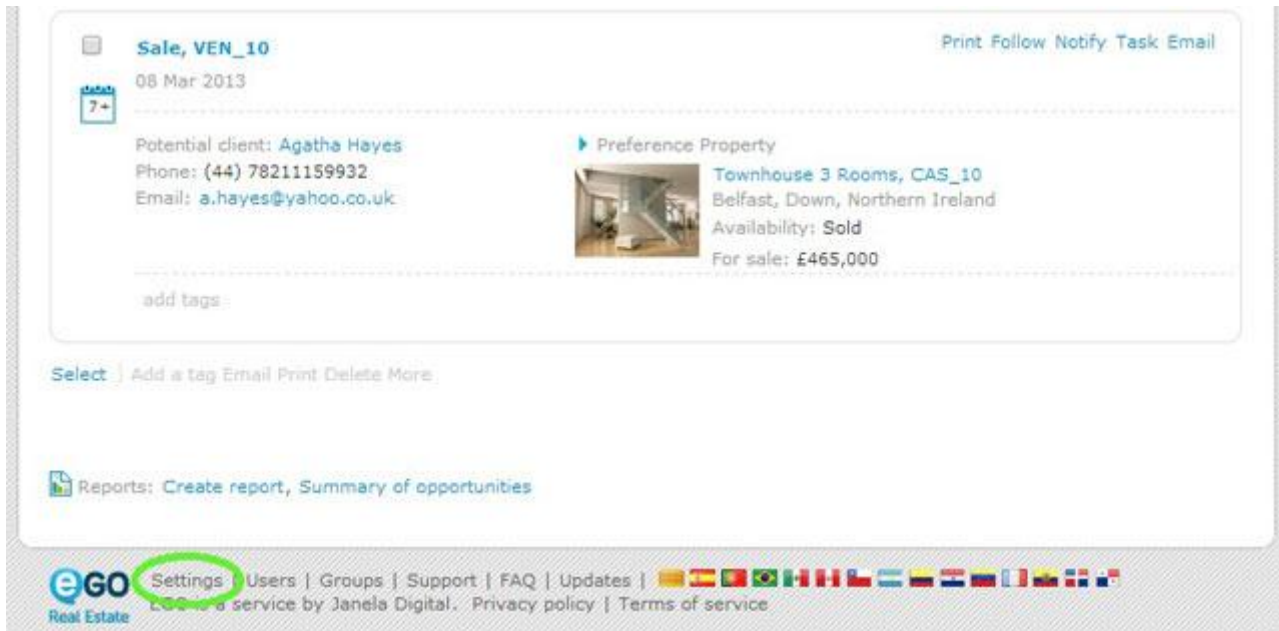
Broker 

Salesman 

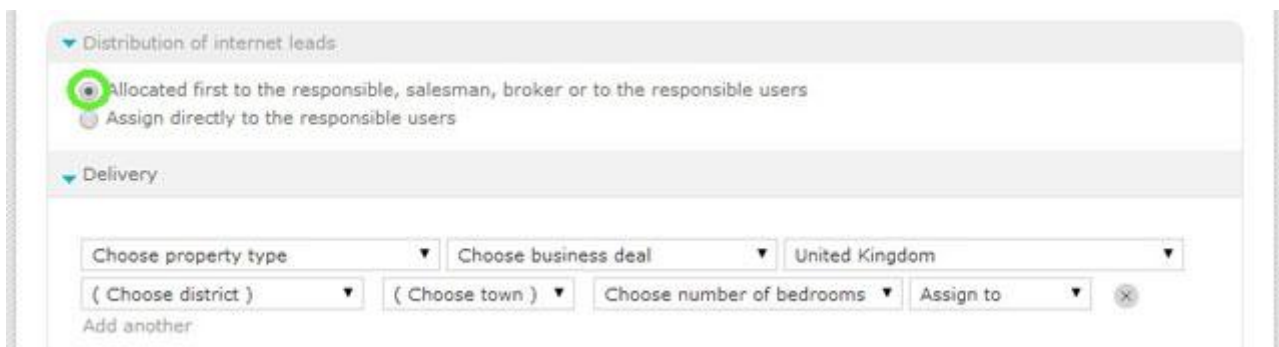
+ Add another

To use **method 1** to deliver the Leads take the following steps:

**1.** On the footer, click '**Settings**';



**2.** Go to '**Distribution of internet leads**' and select '**Allocated first to the responsible, salesman, broker or to the responsible users**';



3. After selecting **Method 1** of the delivery of Leads, click '**Save**';

From now on, Leads will be delivered in accordance with the steps mentioned in

**Method 1.**

▼ Sending matched properties

When inserting property

- Do not send email
- Send email to all potential clients
- Send email to new potential clients

When changing the availability of the property

- Do not send email
- Send email to all potential clients
- Send email to new potential clients

When changing the price of the property

- Do not send email
- Send email to all potential clients
- Send email to new potential clients

Message English (United Kingdom) 

Hello,  
I am sending this email with properties that might be of your interest.  
If you have any doubts or questions, please do not hesitate in contacting us.

**Save** Cancel

 Settings | Users | Groups | Support | FAQ | Updates |   
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**Method 2.** Leads are delivered on a rotation basis to the users who are authorized to receive them.

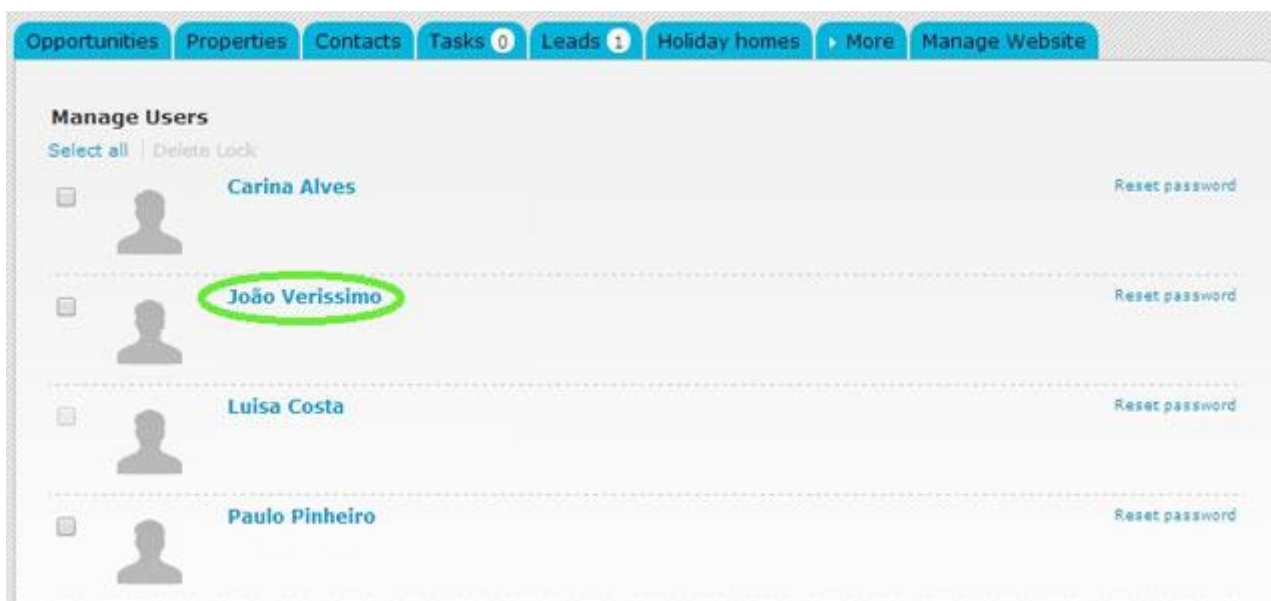
1. When a Lead is received, eGO checks who is allowed to receive it and randomly delivers it.

To apply **Method 2** to the delivery of Leads, take the following steps:

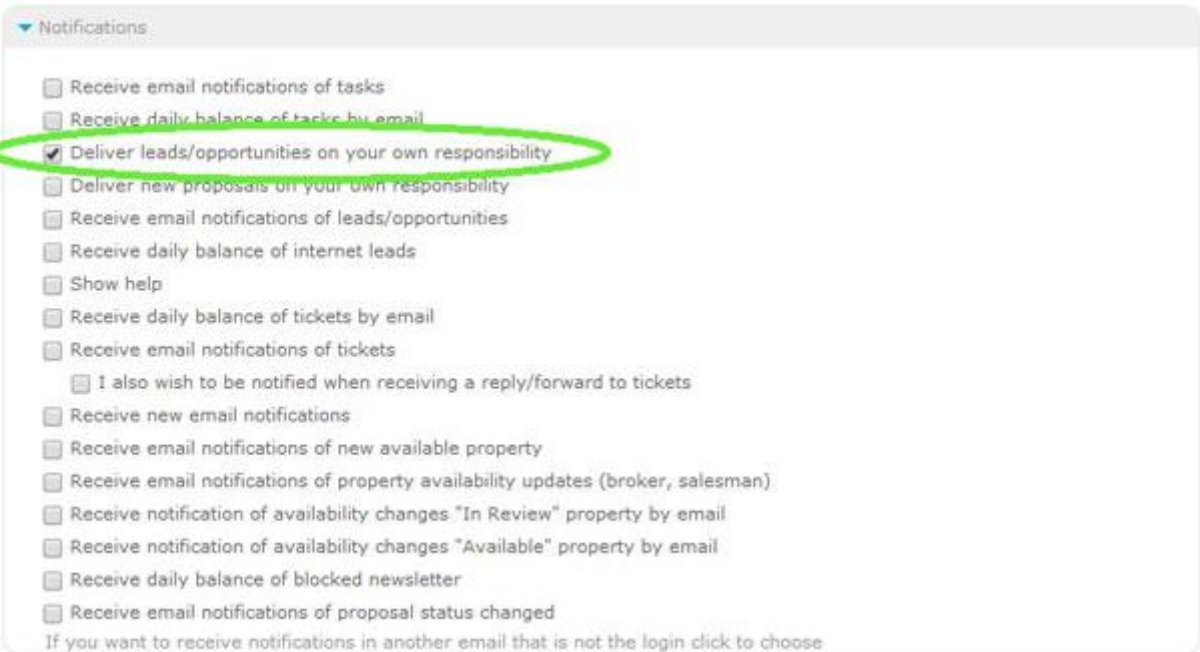
1. On the footer, click '**Users**';



2. Select the user you want to receive Leads;



**3.** In the 'Notifications' section, tick 'Deliver leads/opportunities on your own responsibility';



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 available property
- Receive email notifications of property availability updates (broker, salesman)
- Receive notification of availability changes "In Review" property by email
- Receive notification of availability changes "Available" 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

**4.** Click 'Save';



Objectives

Year: 2014 Month: 7

Contacts you hope to generate

Opportunities you hope to win

Properties you hope to list

Associated groups

- Agents

Permissions

[Save this user](#) [Cancel](#)

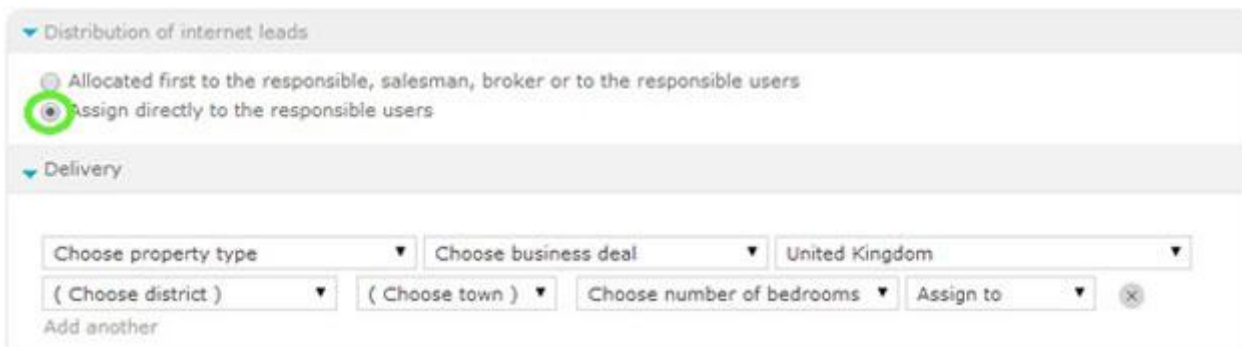
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**Note:** If you want more than one person to be in charge of receiving Leads, select the other user and redo the previous steps.

**5. Go to 'Settings';**



**6. In the 'Distribution of internet leads' section, select 'Assign directly to the responsible users';**



7. To conclude, click **'Save'**.

From now on, Leads will be delivered according to **Method 2**.



▼ Sending matched properties

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When changing the availability of the property

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