



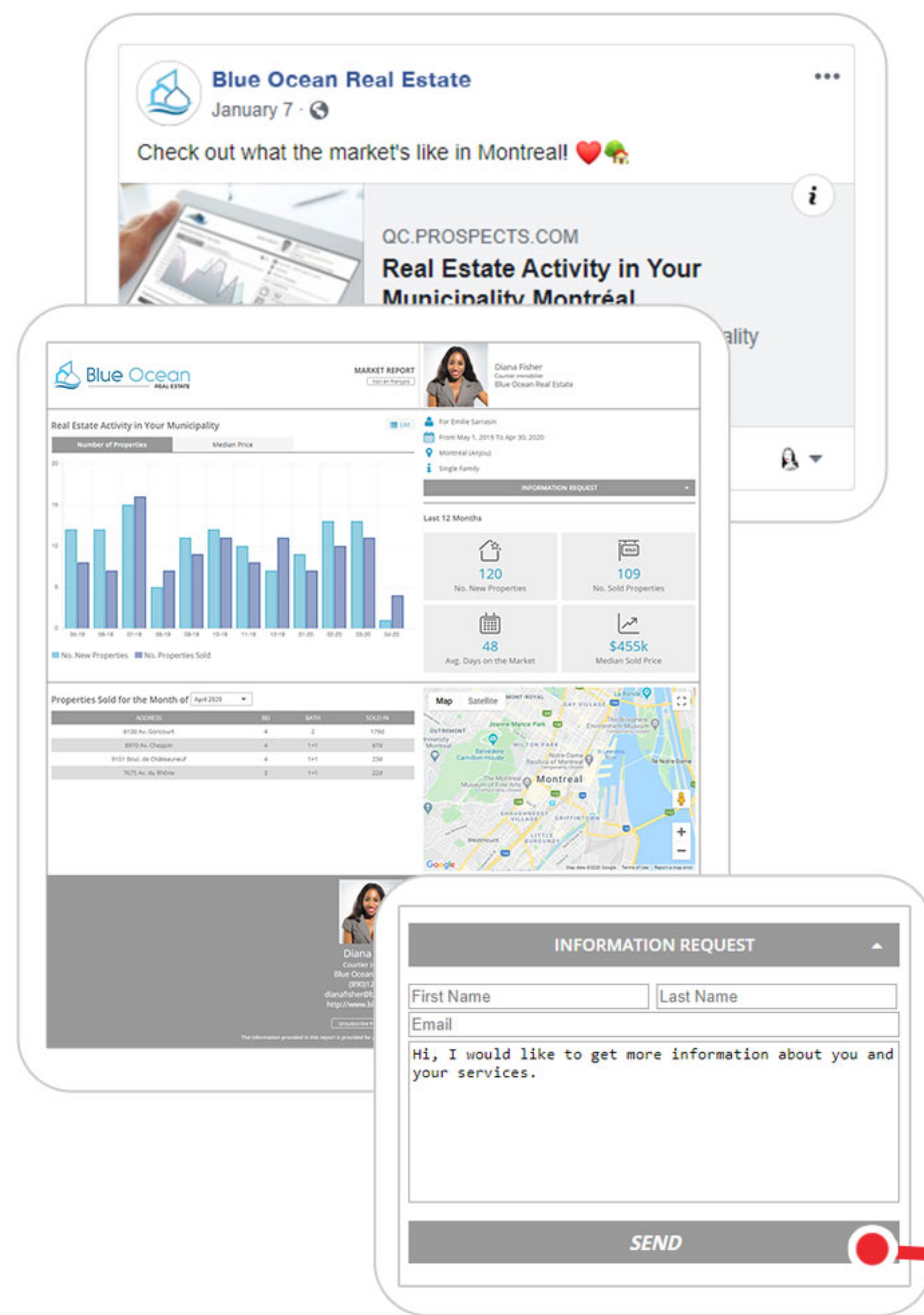
# LEAD MANAGEMENT **MADE EASY**



# Lead Sources Already Working For You

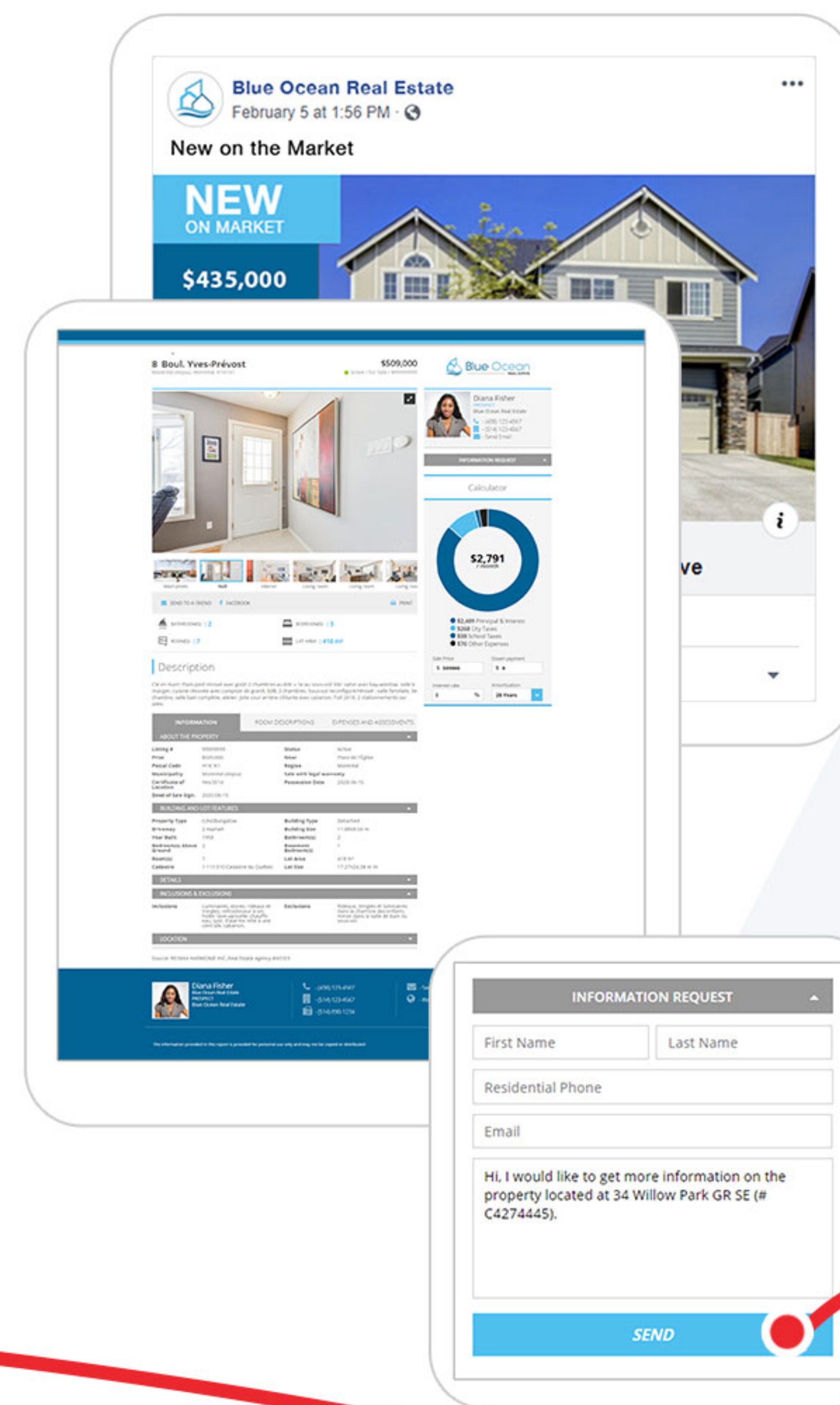
Several key features of your CRM as well as MLS-Touch/Prospects Mobile act as lead generators, which means you may acquire the contact details of new potential clients from them without any action on your part.

## Facebook Market Report

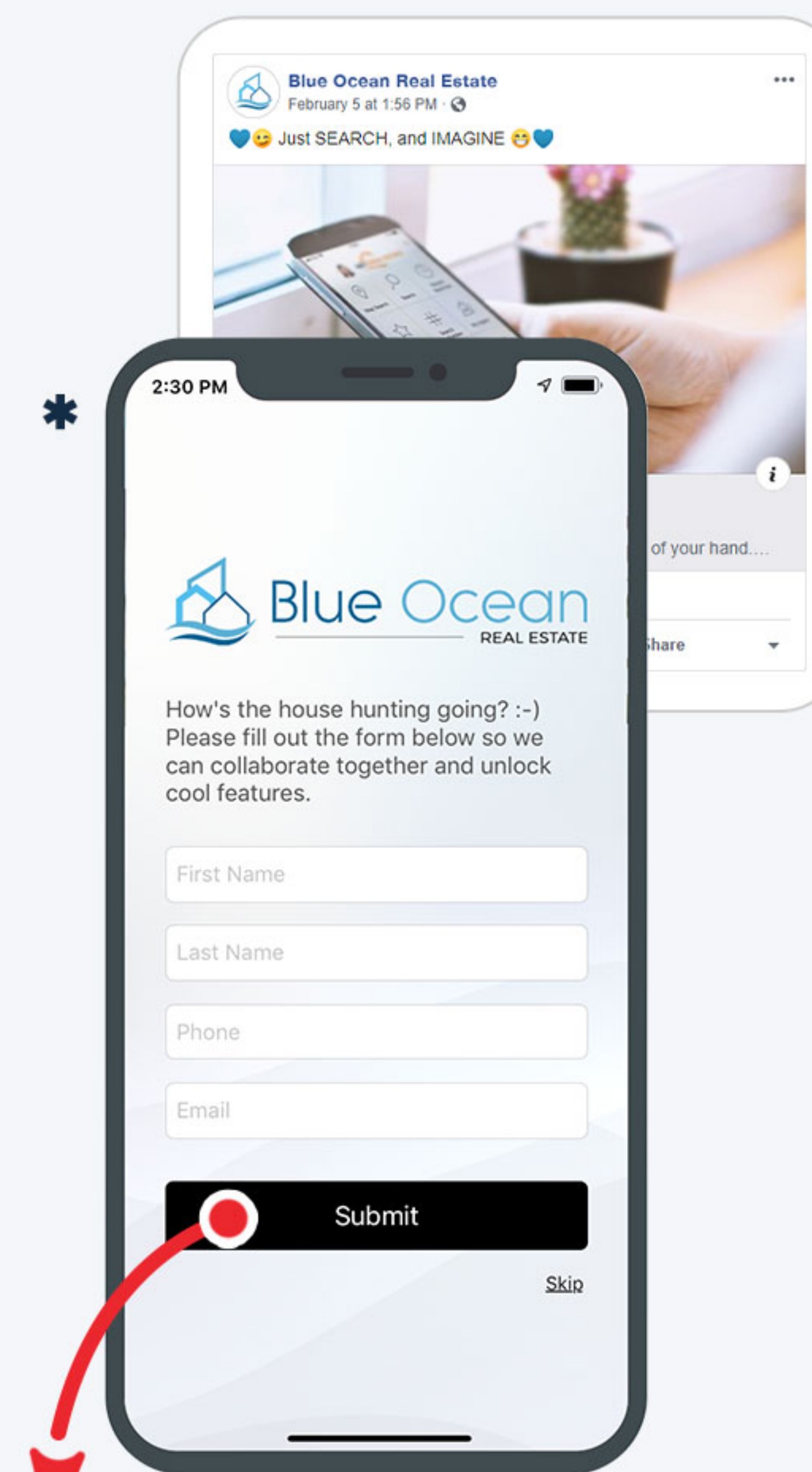


## Listings Details

(emailed & published on Facebook)

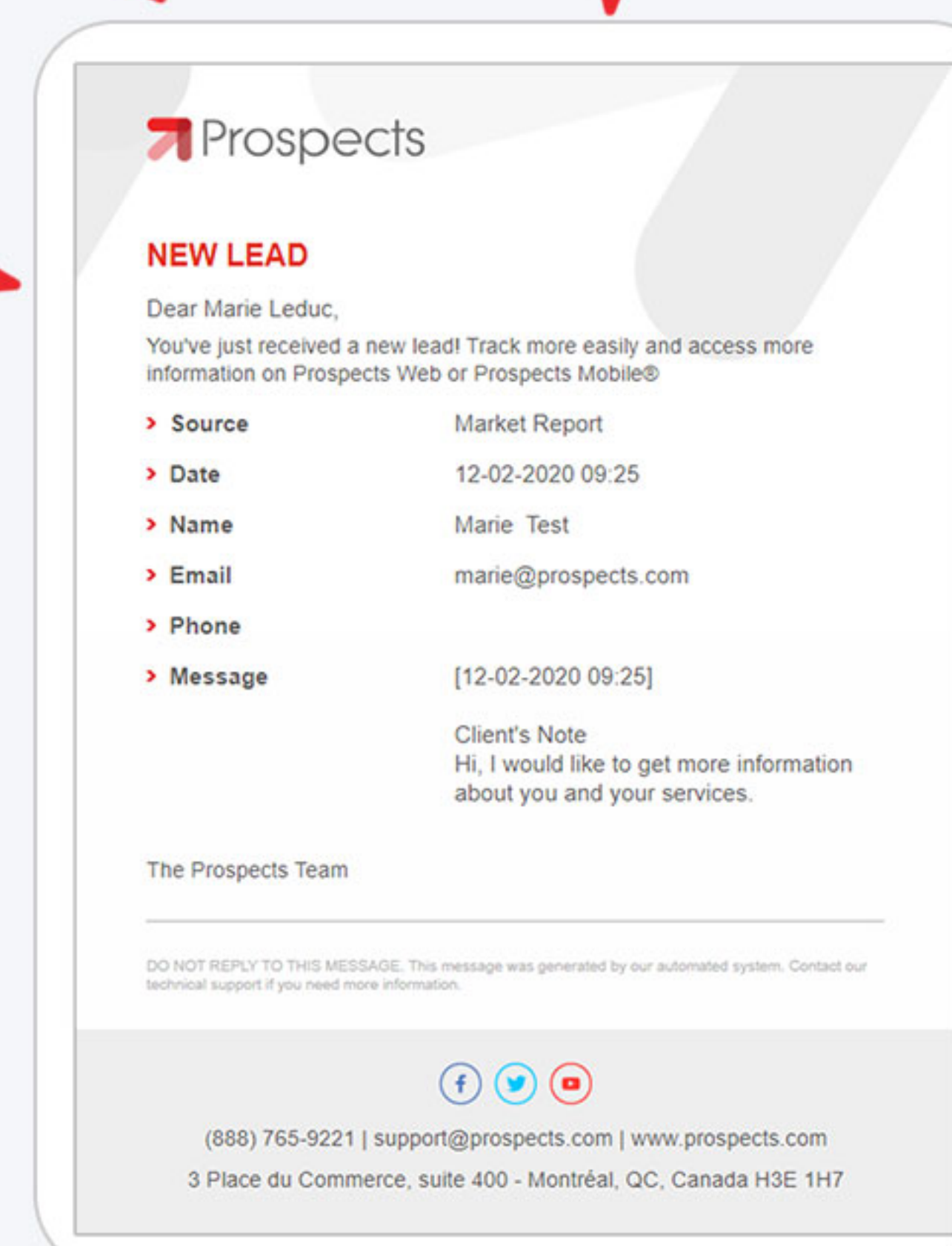


## Branded App\*



## DID YOU KNOW?

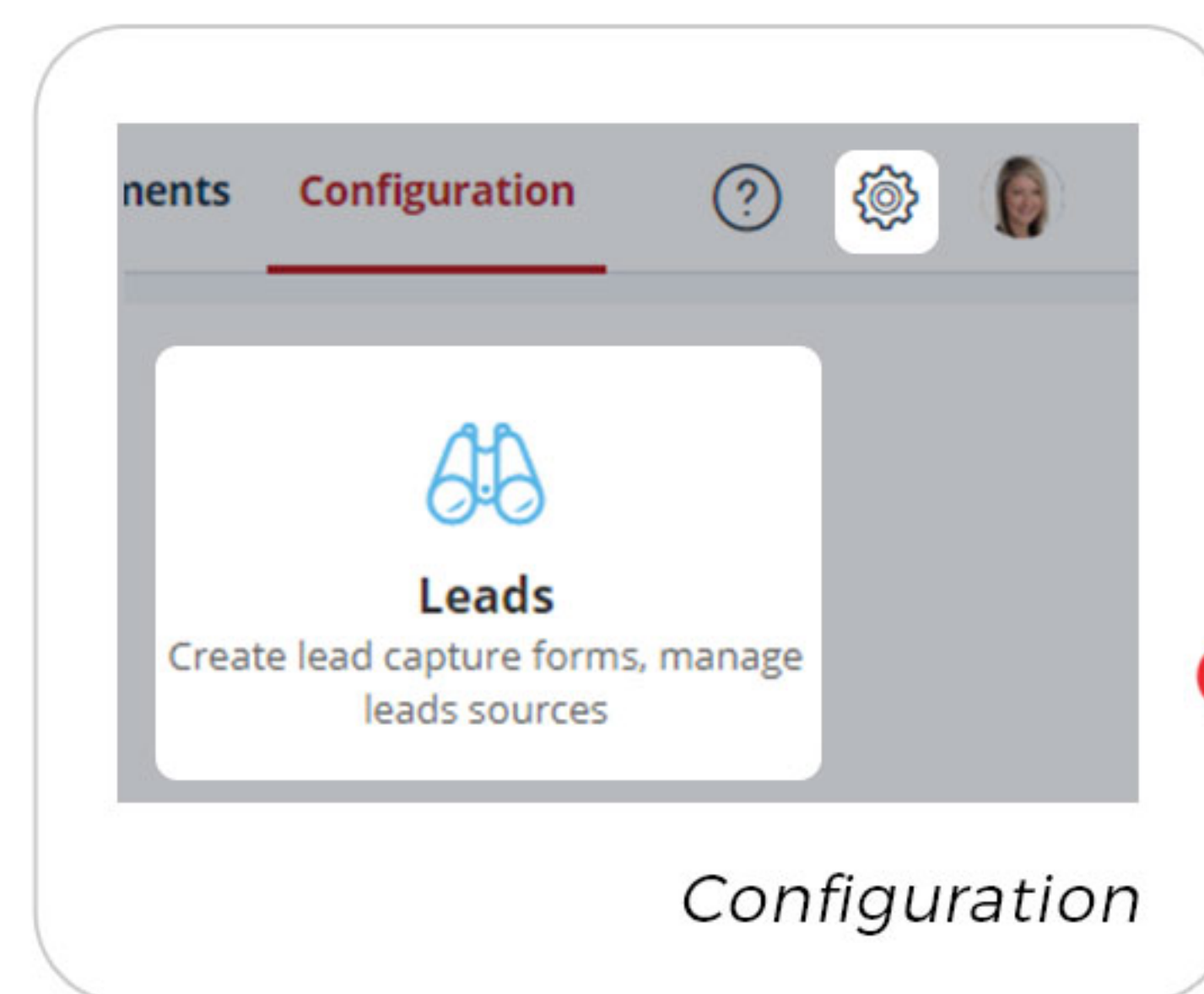
Your CRM will notify you by email when a new lead comes in so you can take action immediately!



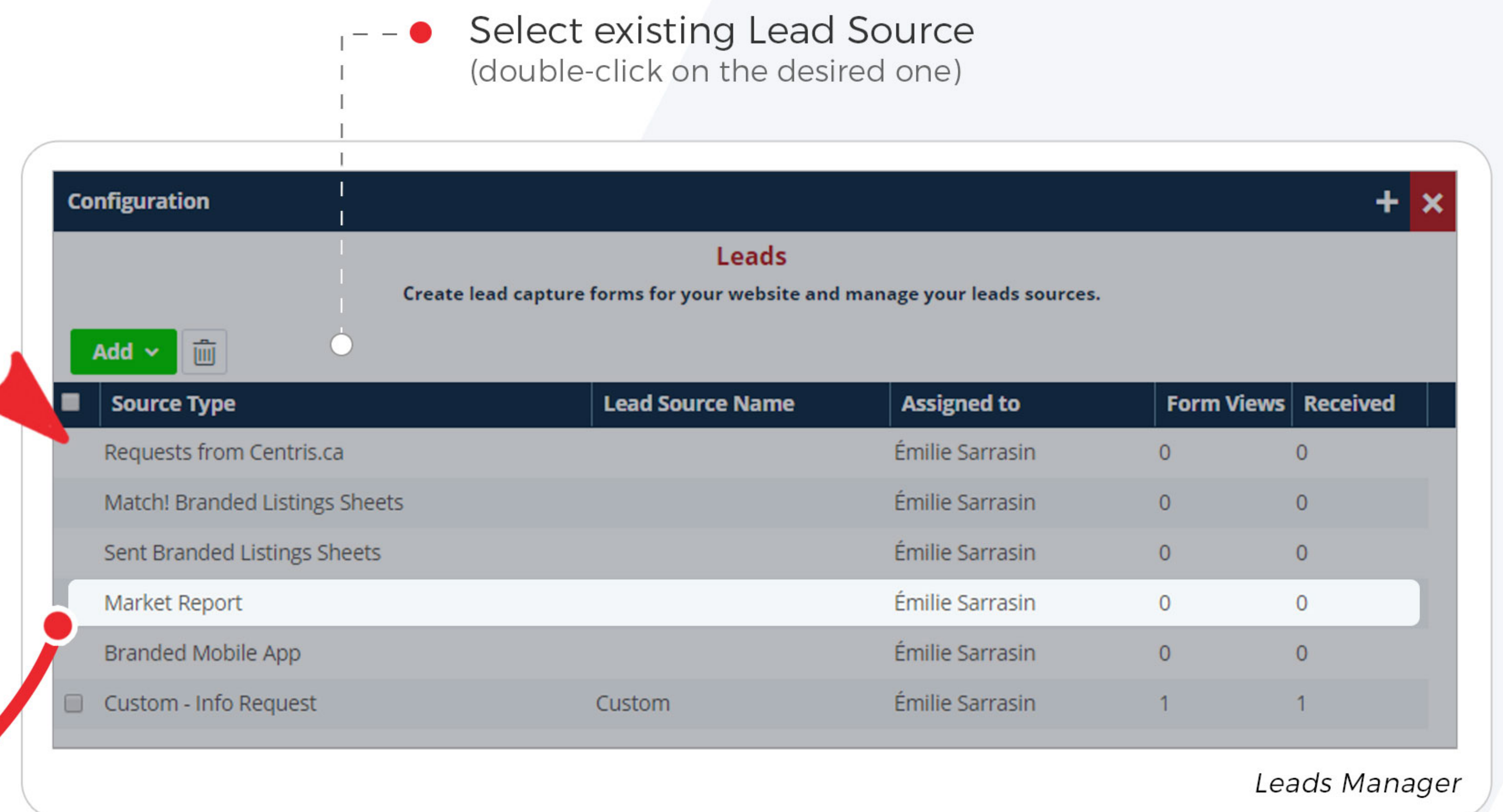


# Put in Place Lead Management Automations

You have full control over how your leads are handled by your CRM. They can automatically be organized with a Keyword and an Action Plan can be launched on your behalf as soon as you accept a lead so you can easily start following up on them.

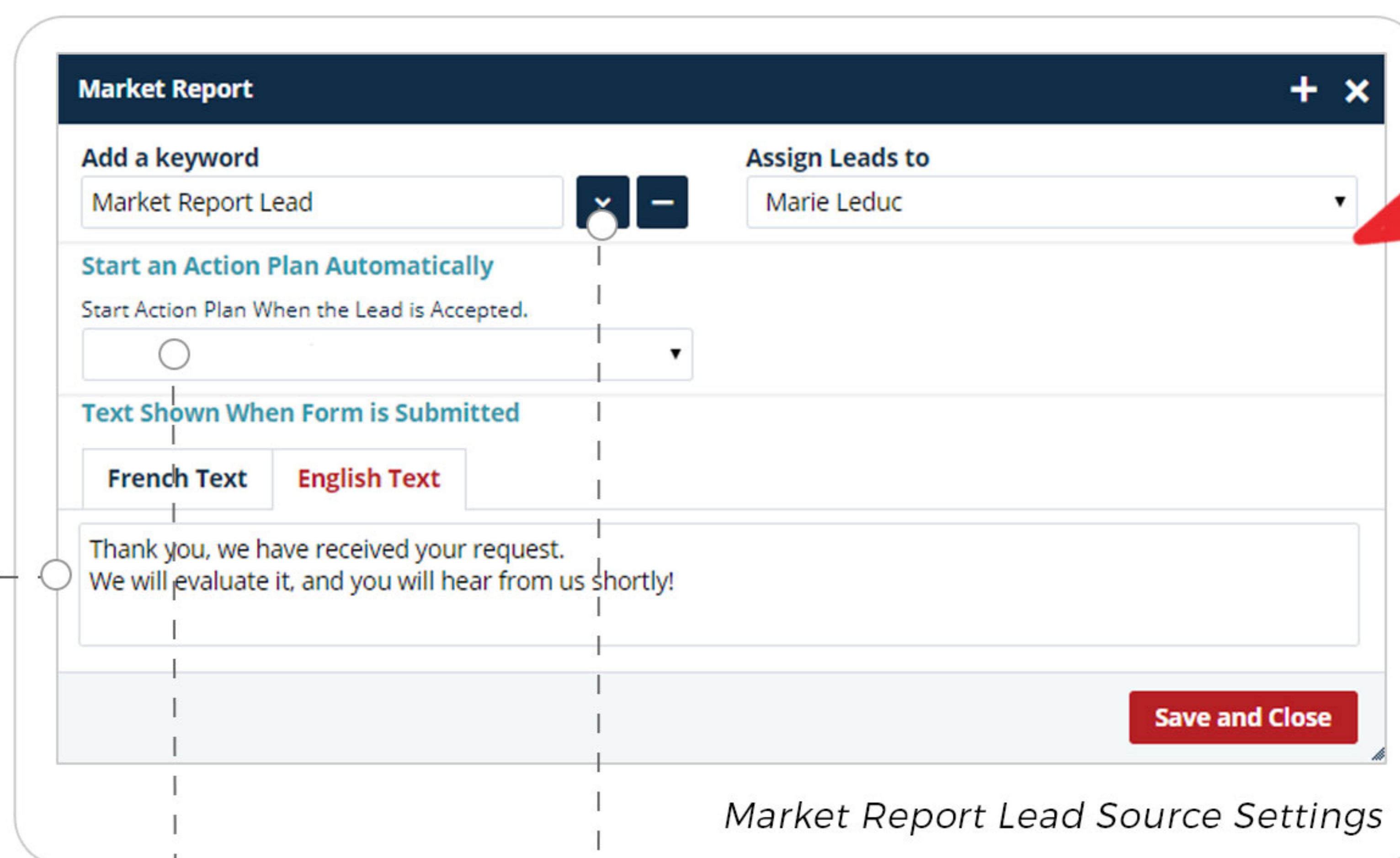


Configuration



Leads Manager

- Personalize the auto-responder message (this message will be displayed to your lead after they have submit their contact details)



Market Report Lead Source Settings

- Select the Keyword that should be assigned

- Specify the Action Plan that should be triggered automatically

## DID YOU KNOW?

Adding a searchable Keyword can help you stay engaged with your leads allowing you to target them when need be and starting an Action plan launches an automatic email drip campaign, action or reminder set to keep in touch with them effortlessly!

Want to stay on top of your leads immediately? Take advantage of the Action plans currently available in your CRM which can be used as-is or customized.



# Activate Facebook Ad Lead Sources

Leads from your Facebook Ads can automatically be imported in your CRM, but you have to activate those sources first!

## Lead Manager Settings

## Facebook Ads Lead Source Settings

● Add a new Lead Source

	Lead Source Name	Assigned to	Form Views	Received
Custom Lead Form - Info Request Fields		Émilie Sarrasin	0	0
Custom Lead Form - Buyers Fields		Émilie Sarrasin	0	0
Custom Lead Form - Sellers Fields		Émilie Sarrasin	0	0
Custom Lead Form - Market Report Fields		Émilie Sarrasin	0	0
Facebook Ads		Émilie Sarrasin	0	0
Zillow/Trulia		Émilie Sarrasin	0	0
Custom - Info Request	Custom	Émilie Sarrasin	1	1

**Facebook Ads**

Subscribe this source to a lead form created in Facebook.  
Select a business page and then a lead form.

Select Business Page: Blue Ocean Real Estate | Select Lead Form: Luxury Properties - May 11

Next >

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**Facebook Ads**

Lead Source Name: Luxury Properties - May 11

Add a keyword: Luxury Properties Lead | Assign Leads to: [Dropdown]

Start an Action Plan Automatically: Start Action Plan When the Lead is Accepted. | 2 Month Buyer Prospecting Plan

Facebook Lead Form: This source is subscribed to this Facebook lead form:

Business Page: Blue Ocean Real Estate | Ad Form: Luxury Properties - May 11

Save and Close

● Give your Lead Source a name

● Select the Keyword that should be assigned

● Specify the Action Plan that should be triggered automatically

### DON'T FORGET

This lead source can exclusively be linked to an existing Facebook Ad. **You will be required to create your ad through Facebook before proceeding.** A lead source will have to be created for each existing Facebook Ad.



# Activate Zillow/Trulia Lead Sources

Leads from Zillow/Trulia can automatically be imported in your CRM, but you have to activate its source first!

## Lead Manager Settings

● Add a new Lead Source

Lead Source Name	Assigned to	Form Views	Received
Custom Lead Form - Info Request Fields	Émilie Sarrasin	0	0
Custom Lead Form - Buyers Fields	Émilie Sarrasin	0	0
Custom Lead Form - Sellers Fields	Émilie Sarrasin	0	0
Custom Lead Form - Market Report Fields	Émilie Sarrasin	0	0
Facebook Ads	Émilie Sarrasin	0	0
Zillow/Trulia	Émilie Sarrasin	0	0
Custom - Info Request	Émilie Sarrasin	1	1

## Zillow/Trulia Lead Source Settings

**Lead Source Name**

Zillow

**Add a keyword**

Zillow Lead

**Assign Leads to**

**Start an Action Plan Automatically**

Start Action Plan When the Lead is Accepted.

2 Month Buyer Prospecting Plan

**Integration with Zillow/Trulia**

- 1) Log into your Zillow Agent account.
- 2) Open the Account page and select "Connect to My CRM".
- 3) Click on "Add Partner" and select Prospects CRM in the dropdown menu.
- 4) Enter the Partner ID indicated below.

do4dOdi9K0bWrk8TSXWjBzm4ym4Cif9jHVV8IRIn7KouStr3LIIFab5UCYLTMYwiMqSdUQz7UXD2+02YL2qsyWBR20EYxvpw0Xon4flEQK9U=

**Save and Close**

● Give your Lead Source a name

● Select the Keyword that should be assigned

● Specify the Action Plan that should be triggered automatically

### DON'T FORGET

This lead source will only be active after you have entered the **Partner ID** in your **Zillow/Trulia account**.



# The Fortune Is In the Follow-Up

Now that you have all your lead sources set up and ready to go, all you have to do is wait for your new leads to come in. As soon as you accept a lead, they will be added to your CRM contacts and automations you put in place will be triggered immediately!

## Through your Dashboard

● Access Dashboard

● Review Lead (click on the name of desired lead)

The screenshot shows the Prospects CRM Dashboard. At the top, there's a navigation bar with 'Dashboard', 'Listings', 'Contacts', 'Calendar', 'Emails', and 'Documents'. The main area features a 'Contacts Tracker' with a donut chart showing lead distribution: 5% Seller Client, 28% Qualified Lead, 35% Unqualified Lead, 20% Buyer Client, and 12% Past Client. Below this is a 'Virtual Assistant' section with several lead cards. One card is highlighted: 'New Lead : Tyson, Mary Anne' with 'Source: Added Manually'. This card has 'Accept' and 'Reject' buttons. Other cards show follow-up reminders for existing clients like John Smith, Martin Walker, and Meaghan Laurie Wilderman.

## Through your Leads Manager

● Access Leads Manager

● Review Lead (double-click on the desired one)

● Accept/Reject selected Lead

The screenshot shows the Prospects CRM Leads Manager. At the top, there's a navigation bar with 'Dashboard', 'Listings', 'Contacts', 'Calendar', 'Emails', 'Documents', and 'Leads'. Below the navigation bar is a search and filter section with 'Name', 'Source Type' (set to 'All'), and 'Status' (set to '(2) New, Pending'). A 'SEARCH' button is present. Below this is a table of leads with columns: Name, Creation date, Status, and Source. The table contains three rows of leads. An 'Action' dropdown menu is open over the first row, showing options: 'Accept', 'Reject', and 'Assign'. The 'Leduc' lead is selected in the table.

Name	Creation date	Status	Source
Leduc	July 5 2019 04:39 PM	New	Custom
Leduc	July 5 2019 04:38 PM	New	Custom
Smith, Tom	February 6 2017 10:35 AM	New	Custom



# We Have the Answers to All Your Questions!

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[support@prospects.com](mailto:support@prospects.com)

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