

## Leads, Out of Area, Archives

### My Leads:

The My Leads dashboard is a collection of sellers that have been collected from various sources including your brokerage and leads generated through your Buyside Home Valuation Site (ePropertyWatch, Direct Contact, and Claim your Home).

The screenshot shows the Buyside Home Valuation Dashboard. At the top, there's a navigation bar with 'Dashboard', 'Marketing Suite', 'BMA', 'My Listings', 'My Buyers', 'Find', and 'Add'. A user profile for 'Joe Broker' is visible on the right. Below the navigation bar are four tabs: 'Home Valuation Site', 'My Leads' (selected), 'Out of Area', and 'Archived Valuations'. The main heading is 'Home Valuation Dashboard' with the subtitle 'See Seller Lead results from your marketing efforts'. Below this, there are filter statistics for the last 90 days: 14 Valuation attempts, 1 Receiving Monthly Reports, 2 Claimed a Property, 2 Sent an Inquiry, and 0 Unsubscribed. There are search filters for 'Search by Address', 'Search by Name', 'Date From' (03-14-2020), and 'Date To' (06-12-2020). Below the filters are three download buttons: 'DOWNLOAD RESULTS', 'DOWNLOAD AVERY LABELS', and 'DOWNLOAD VALUATION ATTEMPTS'. The 'My Leads' section is a table with the following columns: NAME / EMAIL, OWNER NAME, ADDRESS, LAST REPORT ACTIVITY, VALUATIONS, and ACTIONS. The table contains two rows of lead data.

1	NAME / EMAIL	2	OWNER NAME	3	ADDRESS	4	LAST REPORT ACTIVITY	5	VALUATIONS	6	ACTIONS
1	No name provided 6/11/20 @ 1:07pm	Gilfoy Michael	1352 Kathy Ct Livermore, CA 94550 6/11/20 1:07pm	MONTHLY INQUIRY CLAIMED	\$885,077 +3	ARCHIVE					
2	No name provided 5/26/20 @ 1:14pm	Gilfoy Michael	1352 Kathy Ct Livermore, CA 94550 5/26/20 1:14pm	MONTHLY INQUIRY CLAIMED	\$893,581 +2	ARCHIVE					

1. The Name/Email column provides you with the contact information for a seller lead. If someone does not leave their contact information, you will see this "I" for more information.
2. The Owner Name column provides the name of the seller lead.
3. The Address column not only provides the address of the lead, but also the confidence level. The confidence level indicates if this lead is actually the homeowner.
4. The Last Report Activity column consists of three tags that display the lead's last activity with date and time stamps.
5. The Valuations column is a one of the three automatic valuations that we have for the property. To see the other valuations of the property, select the hyperlinked number.
6. The Actions column is up to you. You can archive the lead, or you can create a BMA.

### Out of Area:

This page looks similar to the My Leads dashboard, but these are the leads that are outside of the bandwidth of your brokerage.

Dashboard Marketing Suite BMA My Listings My Buyers Find Add Joe Broker

Home Valuation Site My Leads Out of Area Archived Valuations

## Home Valuation Dashboard

See Seller Lead results from your marketing efforts

Filter Key Stats from last 90 days ?

0 Valuation attempts  0 Receiving Monthly Reports  0 Claimed a Property  0 Sent an Inquiry  0 Unsubscribed

Search by Address Search by Name Date From Date To FILTER

DOWNLOAD RESULTS DOWNLOAD AVERY LABELS DOWNLOAD VALUATION ATTEMPTS

### Out of Area

NAME / EMAIL	OWNER NAME	ADDRESS	LAST REPORT ACTIVITY	VALUATIONS	ACTIONS
5 No name provided 6/17/20 @ 4:04pm	Gilfoy Michael	1352 Kathy Ct Livermore, CA 94550 6/17/20 4:04pm	MONTHLY INQUIRY CLAIMED	\$883,728 ±3	ARCHIVE
6 No name provided 6/15/20 @ 4:35pm	Gilfoy Michael	1352 Kathy Ct Livermore, CA 94550 6/15/20 4:35pm	MONTHLY INQUIRY CLAIMED	\$885,087 ±3	ARCHIVE

### Archive:

Once you have reached out to a potential seller, you may want to archive the lead.

1. From the My Leads dashboard, select **“Archive”** under the Actions column of the lead you would like to archive.

Dashboard Marketing Suite BMA My Listings My Buyers Find Add Joe Broker

Home Valuation Site My Leads Out of Area Archived Valuations

## Home Valuation Dashboard

See Seller Lead results from your marketing efforts

Filter Key Stats from last 90 days ?

8 Valuation attempts  0 Receiving Monthly Reports  0 Claimed a Property  4 Sent an Inquiry  0 Unsubscribed

Search by Address Search by Name Date From Date To FILTER

DOWNLOAD RESULTS DOWNLOAD AVERY LABELS DOWNLOAD VALUATION ATTEMPTS

### My Leads

NAME / EMAIL	OWNER NAME	ADDRESS	LAST REPORT ACTIVITY	VALUATIONS	ACTIONS
1		1352 Kathy Ct Livermore, CA 94550 7/16/20 6:07pm	MONTHLY INQUIRY CLAIMED		ARCHIVE CREATE BMA
2		1352 Kathy Ct Livermore, CA 94550 7/9/20 5:00am	MONTHLY INQUIRY CLAIMED		ARCHIVE CREATE BMA
3 No name provided 6/30/20 @ 11:30am	Gilfoy Michael	1352 Kathy Ct Livermore, CA 94550 6/30/20 11:30am	MONTHLY INQUIRY CLAIMED	\$882,834 ±3	ARCHIVE
4	Gilfoy Michael	1352 Kathy Ct	MONTHLY INQUIRY CLAIMED	\$883,491 ±3	ARCHIVE

- This lead will then move to the Archived Valuations tab. If the client becomes a warm lead again or this was done in error, you can unarchive the lead by selecting “Unarchive”.

The screenshot shows the Buyside dashboard interface. At the top, there is a navigation bar with the Buyside logo and several menu items: Dashboard, Marketing Suite, BMA, My Listings, My Buyers, Find, and Add. On the right side of the navigation bar, the user's name 'Joe Broker' is displayed along with a profile picture and a notification icon with a red '2'. Below the navigation bar, there are four tabs: Home Valuation Site, My Leads, Out of Area, and Archived Valuations. The Archived Valuations tab is currently selected. Below the tabs, there is a search filter section with 'Date From' (04-17-2020) and 'Date To' (07-16-2020) fields, and a 'SEARCH' button. The main content area is titled 'Archived Valuations' and contains a table with the following columns: NAME / EMAIL, OWNER NAME, ADDRESS, LAST REPORT ACTIVITY, VALUATIONS, and ACTIONS. The table lists two archived valuations. The first row shows a valuation for Michael Gilroy at 1352 Kathy Ct, Livermore, CA 94550, with a valuation of \$885,087 and an 'UNARCHIVE' button highlighted with a red box. The second row shows a valuation for Amanda Williams at 668 Davis Ln, Wayne, PA 19087, with a valuation of \$534,466 and an 'UNARCHIVE' button.

NAME / EMAIL	OWNER NAME	ADDRESS	LAST REPORT ACTIVITY	VALUATIONS	ACTIONS
1 No name provided 6/15/20 @ 4:34pm	Gilroy Michael	1352 Kathy Ct Livermore, CA 94550 6/15/20 4:34pm	MONTHLY INQUIRY CLAIMED	\$885,087 ±3	UNARCHIVE
2 No name provided 5/13/20 @ 2:15pm	Williams Amanda	668 Davis Ln Wayne, PA 19087 5/13/20 2:15pm	MONTHLY INQUIRY CLAIMED	\$534,466 ±3	UNARCHIVE