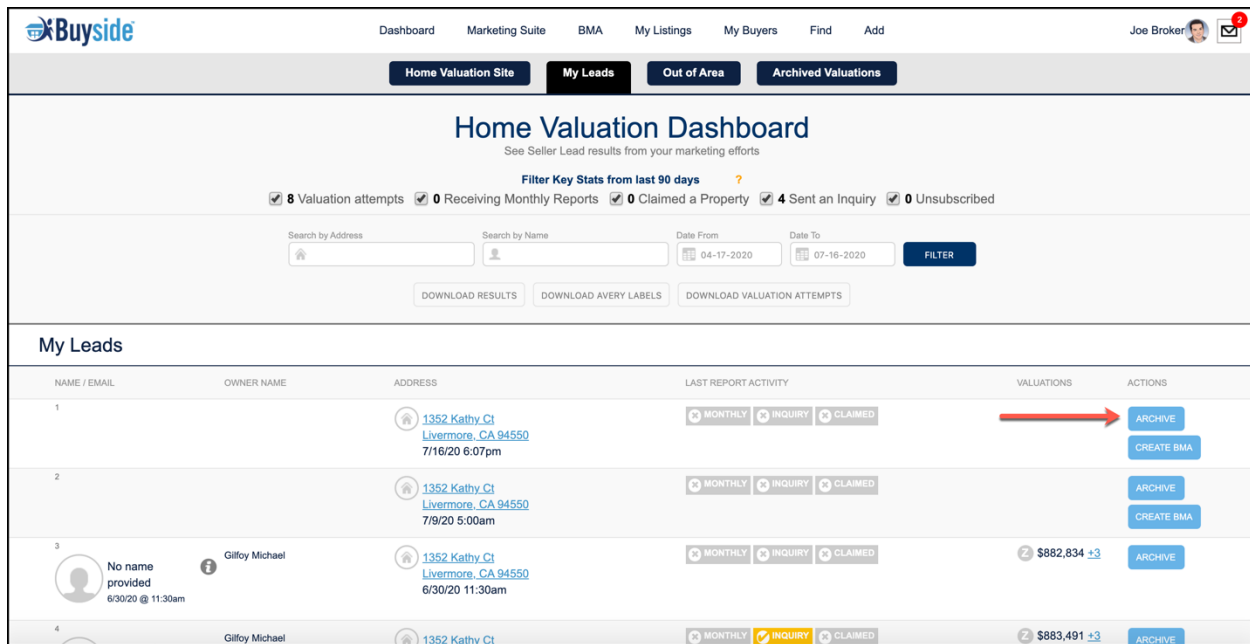


How to Archive a Valuation Attempt

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. You will get a confirmation box making sure that you want to archive this lead before completing the action.



The screenshot shows the Buyside Home Valuation Dashboard. At the top, there are navigation tabs: Home Valuation Site, My Leads (selected), Out of Area, and Archived Valuations. The dashboard title is "Home Valuation Dashboard" with the subtitle "See Seller Lead results from your marketing efforts". Below this, there are filter statistics: 8 Valuation attempts, 0 Receiving Monthly Reports, 0 Claimed a Property, 4 Sent an Inquiry, and 0 Unsubscribed. There are search fields for Address and Name, and date range filters (04-17-2020 to 07-16-2020). Below the filters are download buttons for Results, Avery Labels, and Valuation Attempts.

The "My Leads" section contains a table with the following data:









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

2. 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”**.

- Home Valuation Site
- My Leads
- Out of Area
- Archived Valuations

Date From: 04-17-2020 Date To: 07-16-2020

Archived Valuations

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	<input type="button" value="MONTHLY"/> <input type="button" value="INQUIRY"/> <input type="button" value="CLAIMED"/>	 \$885,087 ±3	<input type="button" value="UNARCHIVE"/>
2  No name provided 5/13/20 @ 2:15pm	 Williams Amanda	 668 Davis Ln Wayne, PA 19087 5/13/20 2:15pm	<input type="button" value="MONTHLY"/> <input type="button" value="INQUIRY"/> <input type="button" value="CLAIMED"/>	 \$534,466 ±3	<input type="button" value="UNARCHIVE"/>