

# Dashboard

## Tasks ?

All **2** Requests **2** Personal **0**

04/09/16 Request for Info from No First Name Provided New Contact From Zillow

View Details ▾

04/09/16 Request for Info from No First Name Provided New Contact From Zillow

View Details ▾


- Search
- Notifications
- Quick Add
- Business **2**
- Contacts **1**
- Reports COMING
- Manage
- Quick Links
- Support

## Follow-ups ?

Priority **1** Leads **0** Prospects **0** Clients **0** Needs Attention **0**

**STEP 1: CLICK ON THE CLIENT'S NAME (it's a blue link).**

**THIS LEAD IS OUT OF COMPLIANCE BECAUSE THEY HAVE NEVER BEEN CONTACTED.**

	NAME	ZAPSCORE	MEDIAN PRICE	PRIORITY CONTACT	LAST CONTACT	
★	No First Name Provided N... <small>B BROKER QL</small>	99	\$ 234,000	None	NO CONTACT	 

### ☆ No first name provided New Contact from Zillow

B BROKER

SOME TIMES THEY DO NOT PROVIDE A NAME ON THE SITE THAT THEY REQUESTED INFORMATION ON. THAT'S OKAY, BECAUSE A PHONE NUMBER AND EMAIL ADDRESS WAS PROVIDED. YOU CAN ALWAYS ADD A NAME ONCE YOU SPEAK TO THEM.

**Action Items** !

- No first name provided is in out of compliance status. Make a call or send an email.
- No first name provided needs to be assigned to a Follow-up Plan. [Add a Plan](#)
- No first name provided has pending Requests for Info. [View Details](#)

**THE ACTION ITEMS ARE IMPORTANT AND HELPFUL IN KEEPING YOUR LEADS IN COMPLIANCE!**

**THIS CLIENT HAS REQUESTED INFORMATION ON A PROPERTY!!**

**SETTING UP YOUR CLIENTS ON A FOLLOW UP PLAN IS VERY EASY EASY WAY TO MAKE SURE THAT YOU CLIENT KEEPS YOU IN MIND FOR CURRENT AND FUTURE REAL ESTATE NEEDS.**

Basic Info ZapScore Campaigns Business History

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#### Basic Info

##### CONTACT INFO

Phone (Unknown): [Redacted]

Email (Primary): [Redacted]

Email (Others):

##### QUICK DATES

Priority Contact:

Last Login: 04/10/16

Last Contact: **NO CONTACT**

Last Inbound Email:

Date Entered: 04/09/16

##### ACCOUNT INFO

Consumer Login: [Redacted]

Relationship: New Lead

Agent Type: Primary Agent

Lead Type: Broker

Client Type: Buyer

Source:

LR Lead Source: Zillow.com Listing New Contact

Email Settings: Opted Into Bulk Email

##### PERSONAL DETAILS

Name: No first name provided New Contact from Zillow

Financing:

Client Interest:

Timeline to Transact:

Property Interest:

Search Area: Monroe, LA

Current Address:

##### PROFILE NOTES

☆ No first name provided New Contact from Zillow

B BROKER RL

CLICK ON CAMPAIGNS TO QUICKLY NAVIGATE TO SETTING UP YOUR CLIENT ON A DRIP CAMPAIGN (or two).

Basic Info ZapScore Campaigns Business History

Campaigns & Follow-ups

Watched Homes Updates

CREATED

No Watched Homes Updates set up yet. Set one up now!

YOU CAN SET THEM UP ON HOME WATCH UPDATES FOR PROPERTIES THAT THEY HAVE SHOWN INTEREST IN.

New Listing Alerts

CREATED

No New Listing Alerts set up yet. Set one up now!

YOU CAN CREATE A NEW LISTING ALERT FOR THEM USING THEIR PREFERRED CRITERIA.

Follow-up Plan ?

This contact does not currently belong to a Follow-up Plan.

+ Add Follow Up Plan

Business

Showing Appointments

PROPERTY

REQUESTED

STATUS

☆ No first name provided New Contact from Zillow

B BROKER

Actions ▾



Action Items !

- 1. No first name provided is in out of compliance status. Make a call or send an email.
- 2. No first name provided needs to be assigned to a Follow-up Plan. [Add a Plan](#)
- 3. No first name provided has pending Requests for Info. [View Details](#)

A QUICK WAY TO UPDATE A CLIENT IF THE CLIENT DOESN'T HAVE ANY OTHER PENDING REQUESTS.

Basic Info ZapScore Campaigns Business History

Basic Info

CONTACT INFO

Phone (Unknown): 504-421-4888

Email (Primary): [redacted]

Email (Others):

QUICK DATES

Priority Contact:

Last Login: 04/10/16

Last Contact: NO CONTACT

Last Inbound Email:

Date Entered 04/09/16

ACCOUNT INFO

Consumer Login: [redacted]

Relationship: New Lead

Agent Type: Primary Agent

Lead Type: Broker

Client Type: Buyer

Source:

LR Lead Source: Zillow.com Listing New Contact

Email Settings: Opted Into Bulk Email

PERSONAL DETAILS

Name: No first name provided New Contact from Zillow

Financing:

Client Interest:

Timeline to Transact:

Property Interest:

Search Area: Monroe, LA

Current Address:

PROFILE NOTES

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ANOTHER QUICK SUMMARY OF EVERYTHING THAT HAS TAKEN PLACE OR REQUESTED

PROPERTY LAST UPDATED STATUS

No Listings yet.

+ Add A Listing

- Search
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History

CLICK ON VIEW DETAILS TO GO INTO EACH ACTION ITEM TO COMPLETE REQUESTS AND TO VIEW ANY OTHER SYSTEM MESSAGES.

3 Results

TIME FRAME

All Time

TYPE

All

AUTHOR

All

Info Request Alert 04/10/16  
Request: Looking for a nice home on Lake D'arbonne My name is [redacted] # [redacted]

Original Lead Information 04/09/16  
Question about the home at [redacted] - Your Edge in Real Estate New Contact from Zillow "I am in...

Emailed No first name provided 04/09/16  
Get started searching on coldwellbankerrealestate.com!

View Details

View Details

View Details