**REI CRM**

**Link:** <https://share.vidyard.com/watch/KuNTTsr6zpzwqFnf7tGSaJ>

**Link:** <https://share.vidyard.com/watch/iiHz8Rz4o98X6TPYmshcQh>

**Link:** <https://share.vidyard.com/watch/frrbyZ3FzgvVbxUJydxRxX>

**Link:** <https://share.vidyard.com/watch/6wzrw2cXWN1RUMiAh5A1pD>

**Task**

When a lead is assigned to a specific team member a task will be generated for that team member, and an email will be shared on his email address to get him notified.

When the task will be generated, the task status will be Pending by default, and if the task deadline has been passed then the status will automatically changed to Past Due.

* If the user has completed the task or the task has been canceled the user will manually update the status of the task.
* When a task is generated the task title will be (Status of the Lead\_Property Address).

When a follow up date has arrived a task will be generated for the Lead Manager with the title of {Follow Up Needed\_Seller Name\_Address} and the follow up notes will be shared with the Lead Manager in that task.

When the task is generated the Lead Manager Action will be “Response Needed”. Once the user mark the status of the task Completed/Cancelled the Lead Manager Action will be changed to “Responded To”.

**Contact**

A hidden field will be there where the striped data (striped email and striped contact number) of the client will be stored and there can be more than 1 contact and email address. If the details of the previous data is match then new contact will not be created.

The contact will be attached with the Saller Lead and the Cash Buyer application after checking the duplication.

**Seller Lead**

The Lead Soursce will be added in the seller lead which will confirm that from where the lead has received i.e. Cold Call, Website, Direct Mail, SMS and etc.

**Seller Contact**

When a lead is generated, seller contact will be added in the lead including its contact number and email address.

**Pull Date**

When we add any address in the seller lead, it will pull all the information from Zillow and the details of that address will be added in the lead.

**Lead Manager**

When a lead has been generated a Lead Manager will be assigned to that lead by Round Robin and a task will be generated in the task application for that Lead Manager.

**Quick Follow Up**

The user can add quick follow up by two ways. First by adding the date in the date section. Secondly, by adding the value that on which date the follow up will start.

On Follow up day an email will be sent to the Lead Manager as a reminder regarding his lead. If there is any assigned person in that specific lead an email will also shared to him.

**Sequence Follow Up**

In Sequence follow up the reminders will be shared with the lead manager in sequence of some specific time that follow up will be done after 2 days, 1 week or etc. And on every follow up date a reminder email will be shared with the Lead Manager as well as with the assigned person if there is any.

The user can add upto 10 follow ups in a sequence. However, if the seller advised him not to do follow up any more. The user will stop doing the follow up by just clicking on the Stop Sequence.

To start the Follow Up Sequence the user has to click on the Initiate Sequence.

If the user wants to Pause or Resume the sequence he/she will has to click on the Pause Sequence or Resume Sequence.

**Appointment**

An appointment will be generated for the responsible person, when the follow up date has been arrived with the title of {Appointment\_Seller Name\_Property Address} with the details of the Seller Lead.

An Email will be shared with the to the Responsible that today is your appointment with the title of {Appointment\_Seller Name\_Property Address}.

**Transaction**

When the user will click on the “Generate Purchase Option” in the seller lead, an item will be added in the Transaction application and all the information which is available in the seller lead, will map in that transaction item, and the rest of the fields will be filled in by the user manually.

After fetching the details from the Saller Lead, the user can generate a PDF of that Transaction item, by juct clicking on the “Generate Assignment Contract”. And that PDF will be attached in that transaction item, and the user can view the details of that transaction item in the PDF file.

**Sales**

When the user will click on the “Send to Sales” option in the transaction application, an item will be generated in the Sales Application and all the information which is available in the transaction item, will map in that Sales item, and the rest of the fields will be filled in by the user manually.

After fetching the details from the transaction item, the user can generate a PDF of that sales item, by juct clicking on the “Generate Assignment Agreement”. And that PDF agreement will attached in that sales item, and the user can view the details of that Sales item in the PDF file.

**Team Member**

A team member will be created in the team member application and he will be the Lead Manager of the lead which will be assigned to him through round robin way.

A task will be assigned to that team member through a round-robin way, for that team member who will be the lead manager of that lead.

**FU Messages**

In this application the user can different follow up templates to communicate with the seller regarding his property and messages will be added in the FU Templates.

There are 3 types of Messages

* Email
* SMS
* Voice Mail (VM)

**Email**

In the email message the Subject will be {} and in the body there will be different which will be selected from the FU Templates, which will created by the user.

**SMS**

Different templates can be sent to the user by just selecting the template from the FU Templates. And follow up SMS can also be shared with the Seller or Buyer.

**Voice Mail (VM)**

A Voice Mail will be sent to the Seller or Buyer regarding his property.

**FU Templates**

All the sequence will be shared in FU Templates, from where the user will select the template according to his need and the sequence will be started. The Sequence will be performed just by adding the X number of days in the last follow up i.e. If the last follow up is done on 20 May 2022 and the next follow up is after 3 days so the system will add 3 days in 20 May 2022 and then perform the task. And then the reminder will be sent to the user on 23 May 2022.