

PASSIVE LEADS

Agents: have you been receiving leads which have “Not Provided” as the customer name?

These types of leads are generated when a customer creates a saved search or portfolio account on your website. They are required to create an account in order to save properties and/or searches, but they may not necessarily be ready to speak with you just yet. So often they will enter only the information that's required in order for them to continue (or sometimes you'll find that they enter fake information).

You have the ability to choose what works best for you and whether you wish to receive these “passive leads” or not, and/or whether or not to make certain fields required.

In your TMGConnect account, go to Leads & Contacts, then Settings.

Under My Portfolio and Home Finder Leads – you will see two check boxes. If you have been receiving the types of leads described above, you likely have these two boxes checked. If you wish to stop receiving these notifications, simply uncheck the boxes and then click Save Preferences.

My Portfolio And My Home Finder Leads

- Create a new lead when a My Portfolio (portfolio account) is created
- Create a new lead when a My Portfolio (home searches) is created

There are pros and cons to both options of course. Perhaps you want to receive these notifications, even if it means that you may not follow up with the customer (or even have a way to, if they don't provide accurate info). In this case, leave the boxes checked. **Important: remember that you will still need to mark these leads as processed!**

If you prefer to only receive notifications from those who purposefully reach out to you by filling out the Request form or other method, then you may wish to uncheck these boxes.

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Require information from the customer

Perhaps you would like to know when accounts are being created, and you want to force the customer to provide you with at least some information. In that instance, you would go to **Leads & Contacts, Settings, then Email Form Options**. Check the boxes for the information that you want to be required when a customer creates an account.

Note that forcing someone to enter required information when they may not be ready to engage could result in their leaving your site altogether, so consider this carefully.

Email Form Options

Contact Us Form Options

- Require daytime phone
- Require evening phone (where available)

Schedule Showing Form Options

- Require daytime phone
- Require evening phone

My Portfolio (Home Finder) Form Options

- Require daytime phone
- Require evening phone

The choice is entirely up to you! This is one of the many customizable settings within TMGConnect that you control and can adjust as desired for your particular business.