

Lead Alert User Guide

(AU Pat App No. 2010900456)

Introduction

Lead Alerts are notifications sent to Sales Agents via SMS and/or email in real time when a Subscriber opens a HTML eMailout or clicks any links within a HTML eMailout a predefined number of times.

Sending your Campaign

1. Import the Subscribers ensuring to include the full Name, Email Address and Mobile Phone number for each Subscriber.
2. Check the configuration of your Lead Alert preferences.
3. Create the eMailout
4. Enable / Disable the Auto Responder and Privacy Information Statement
5. Review and analyse Alert Reports

Lead Alert Tutorial

Section 1: Creating and Managing Your Subscriber List

Creating a meaningful Subscriber list can seem like a daunting task, but you actually have quite a few options. Listed below are several ways to build, maintain and manage your list.

- Open Homes
- Subscription Forms on your website
- Inquiries at your Office
- Surveys
- Including "Forward to Friend" links
- Inviting your subscribers to update their details
- Sign-up incentives for new subscribers

Best Practice Tip: Acquiring and maintaining the correct information about your Subscribers is vital in email marketing. To maximise results utilising iRealty's Lead Alert System the Subscriber list should always include full Name, Email Address and Mobile Phone number for each Subscriber. The best way to start preparing your list is to verify that you have active Subscribers who are interested in the Real Estate you specialise in. One way to do this is by sending each Subscriber a survey with custom questions to discern their interests as well as update their contact information. If you don't already have a list then you want to make sure you have a subscription form with the same custom questions for your potential Subscriber's interests and contact information.

Section 2: Preferences

1. Alert Preferences

These preferences allow you to configure your Lead Alerts System Interface to best suit your sales model and staff by designating the triggers and what information is included in your SMS and/or email alert.

A. Triggers

There are three triggers; each based on different criteria of Subscribers' actions. In this section you select how many Clicks or Opens are required to trigger an alert.

1. Single Property Link – when a Subscriber clicks a single property in your eMailout.
2. Multiple Property Links – when a Subscriber clicks multiple properties in your eMailout.
3. Opens – when a subscriber opens/views the HTML eMailout.

B. Alert Content

This is the content that displays in the email or SMS that is sent as a result of the criteria above being triggered.

1. Link information – Provides the property ID, if the Subscriber triggers a Single Property Alert. If multiple properties were clicked on, the notification will provide a list of the Property links.
2. Subscriber Information – displays contact information from the corresponding subscriber profile.
3. Opens Information – If the Subscriber triggers an Alert due to the number of Opens the number will be displayed.
4. Privacy Information – If the Subscriber follows the "Important Privacy Information" the letter (P) will appear in the SMS as confirmation.

The screenshot shows the 'Alert Preferences' configuration page, divided into 'Email Alert' and 'SMS Alert' sections. Callout boxes A1, A2, and A3 point to trigger settings, while B1 and B2 point to content selection options.

Callout A1: Single Property Link – when a Subscriber clicks a single property link in the eMailout.

Callout A2: Multiple Property Links – when a Subscriber clicks multiple property links in the eMailout.

Callout A3: Opens – when a subscriber opens/views the HTML eMailout.

Callout B1: Link information – Provides the property ID, if the Subscriber triggers a Single Property

Callout B2: Subscriber Information – displays contact information from the corresponding subscriber

Alert Preferences
Select the Email and SMS Triggers for your account.

Email / SMS Alert Preferences	
Email Alert Once a subscriber opens an email, clicks on a property or multiple properties enough times to trigger the Alert, an email will be sent to all of the Email address listed for the Agent and Sales Manager and Administrator.	SMS Alert Once a subscriber opens an email, clicks on a property or multiple properties enough times to trigger the Alert, an SMS will be sent to all of the Mobiles listed for the Agent and Sales Manager and Administrator.
Trigger an Email after <input type="text" value="4"/> Clicks on a Single Property Link in the eMailout	Trigger an SMS after <input type="text" value="4"/> Clicks on a Single Property Link in the eMailout
Trigger an Email after <input type="text" value="6"/> Clicks on Multiple Property Links in the eMailout	Trigger an SMS after <input type="text" value="6"/> Clicks on Multiple Property Links in the eMailout
Trigger an Email after <input type="text" value="4"/> Opens by any subscriber (regardless of clicks)	Trigger an SMS after <input type="text" value="4"/> Opens by any subscriber (regardless of clicks)
Select the content that will be emailed in the Alerts.	Select the content that will be sent in the SMS Alerts.
Link Information: <input checked="" type="checkbox"/> Property Information	Link Information: <input checked="" type="checkbox"/> Property Information
Subscriber Information: <input checked="" type="checkbox"/> Name <input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> Mobile Phone <input checked="" type="checkbox"/> Home Phone <input checked="" type="checkbox"/> Work Phone	Subscriber Information: <input checked="" type="checkbox"/> Name <input checked="" type="checkbox"/> Email <input checked="" type="checkbox"/> Mobile Phone <input checked="" type="checkbox"/> Home Phone <input checked="" type="checkbox"/> Work Phone
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

2. Administrators and Sales Managers Preferences

These preferences are to configure the Lead Alerts that are sent to the Administrator, and the Sales Manager/Principal. The Administrators and Sales Managers will receive a Lead Alert for every Lead Alert sent to a Sales Agent within the trigger categories designated in this section. This allows for the proper management of a Sales Team along with compilation of accurate Sales Statistics.

Enter the Email address for the Email Alerts to be sent to.

Enter the Mobile Phone number for the SMS Alerts to be sent to.

Administrator / Sales Managers

You can setup Managers to receive the Alerts of ALL Agents.

Assigned Staff	Alert Email Address:	Email Alerts:			Alert Mob Number:	SMS Alerts:		
		Single Property Link	Multiple Property Links	Email Opens		Single Property Link	Multiple Property Links	Email Opens
Administrator	<input type="text" value="salesadministrator@irealty.com.au"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="text" value="xxxx xxx xxx"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Sales Manager / Principal	<input type="text" value="salesmanager@irealty.com.au"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="text" value="xxxx xxx xxx"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Trigger Categories – Select the Email Alerts you wish to receive.

Trigger Categories – Select the SMS Alerts you wish to receive.

3. Agent Preferences

The following section allows you to specify which of your Sales Agents are to receive Lead Alerts. Here, you can specify which type and what form of Lead Alerts are sent to each Sales Agent.

iRealty's Lead Alert System also has the ability to specify an alternate Sales Agent should the assigned Sales Agent not be available to receive Sales Alerts at the time of a particular eMarketing Campaign. The Email Address, Mobile Phone number and Alternate Alert recipients Name will be displayed in the auto responder. This will prove useful for substituting Sales Agents when the assigned Sales Agent is not available.

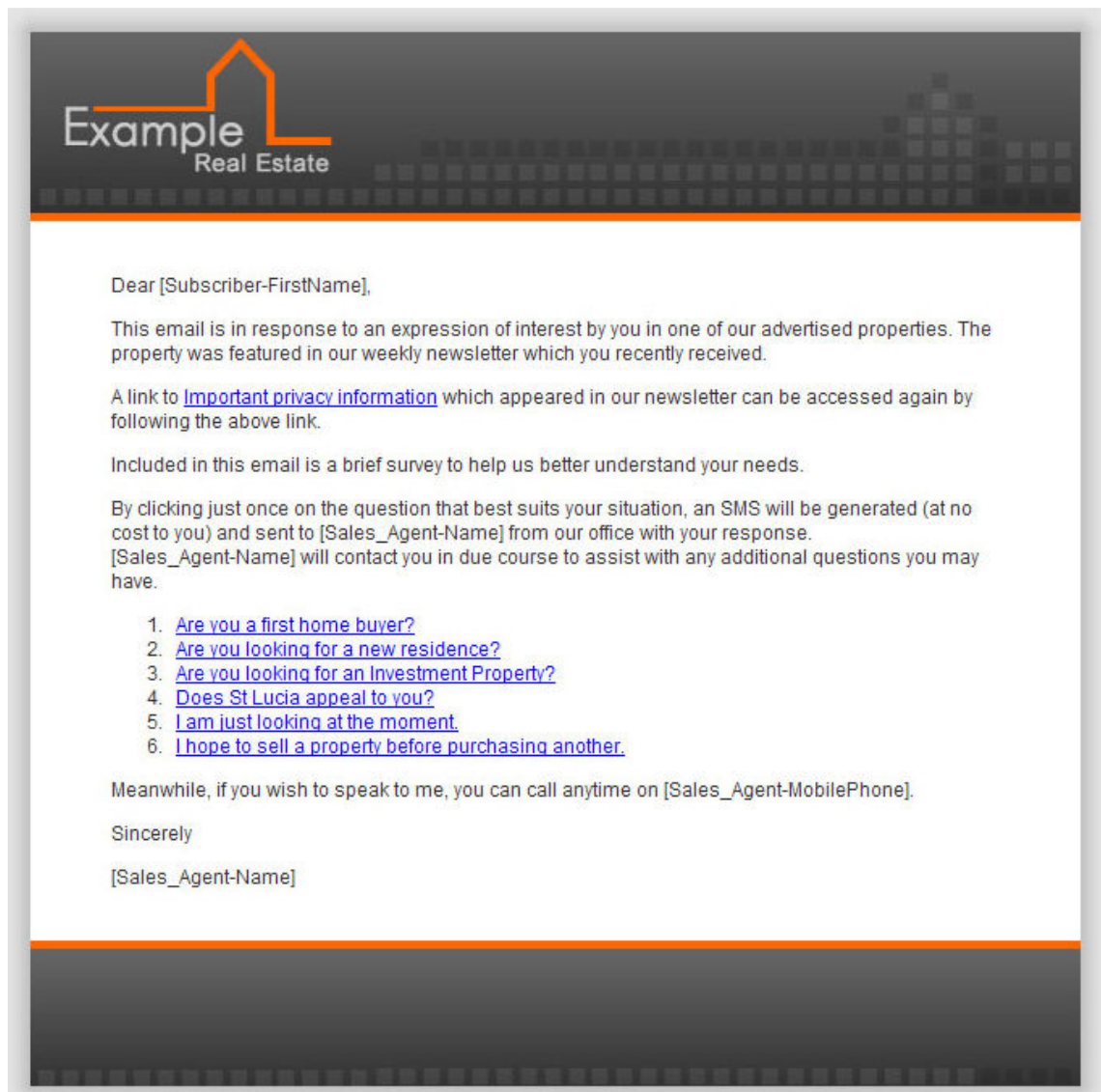
Explanation of use

- A. Sales Agent – the Sales Agent assigned to receive Lead Alerts
- B. Alert Email Address – the specified email address to receive the email Lead Alerts
- C. Email Alerts
 1. Single Property Links – to send a Lead Alert via email when your Subscriber clicks a property the specified number of times
 2. Multiple Property Links – to send a Lead Alert via email when your Subscriber clicks multiple properties the specified number of times
 3. Email Opens – to send a Lead Alert via email when your Subscriber opens or views your HTML eMailout the specified number of times
- D. Alert Mobile Number – the specified Mobile number to receive the SMS Lead Alerts
- E. SMS Alerts
 1. Single Property Links – to send a Lead Alert via SMS when your Subscriber clicks a property the specified number of times
 2. Multiple Property Links – to send a Lead Alert via SMS when your Subscriber clicks multiple properties the specified number of times
 3. Email Opens – to send a Lead Alert via SMS when your subscriber opens or views your HTML eMailout the specified number of times
- F. Alert Allocated To – the Allocated Sales Agent whose name displays in the auto responder sent to the Subscriber

Section 3: Auto Responders

Part of our Lead Alert system initiates the conversation with your subscriber for you. When the auto responder is configured, your subscriber receives an email when the Sales Agent receives a SMS Lead Alert. This email lets the Subscriber know they have triggered the alert and provides them with the Sales Agents contact details, a link to your privacy statement and a small list of questions. Below is an example of the automated dialog process.

- A. You send an eMailout with Lead Alerts enabled.
- B. Your subscriber receives the email and clicks/opens the defined number of times.
- C. An SMS is sent to the Sales Agent with details of the Subscriber activity along with the Subscriber's contact information. An email is sent to the Subscriber with questions to qualify the sales lead, the Sales Agents contact information and a statement notifying the Subscriber that the Sales Agent may contact them.
- D. Either the Sales Agent contacts the Subscriber and begins regular dialog or the Subscriber clicks the hyperlinked question in the auto responder which triggers another SMS Lead Alert to the Sales Agent with the updated information further qualifying the Subscriber as a sales lead.



Note: The auto responder only works for Subscribers clicking on a Single property and only when a SMS Lead Alert is sent to a Sales Agent.

Section 4: Sending Alert Options

When sending an eMailout, you will be prompted whether or not you want Lead Alerts to be sent. By selecting "Yes", you open another selection of options. In these options, you can select whether or not you want your "Privacy Information Statement" included in the eMailout and/or the auto responders to be sent. Below these questions is a table which confirms the Sales Agents assigned to each property.

Step 2. Lead Alert Options

Would you like Alerts to be sent for this email?
 Would you like Privacy Information to be included in this email?
 Would you like Auto Responders to be sent for this email?

Yes No
 Yes No
 Yes No

Property Address	Agent to send Alerts to:	2nd Agent to send Alerts to:
1/24 Example St Exampleville North	Sales Agent 1	No Agent
13 Example St Exampleville	Sales Agent 2	No Agent
61 Example St Exampleville	Sales Agent 3	No Agent
2/124 Example St Exampleville West	Sales Agent 4	No Agent
14 Example St Exampleville	Sales Agent 5	No Agent

Select whether or not to receive Alerts / Important Privacy Information Link / Auto Responders

Check the Properties are assigned to the correct Sales Agent. You may use the drop down list to change the Sales Agent for this eMailout

You may choose to add a second Sales Agent to receive the Alerts