



## Agent CRM

Take control over your business growth.



## IDX Integration

Your IDX website and CRM work together as a single, integrated system to help you optimize your opportunities and work more productively.

- Keep all lead information in one, easy-to-use system
- Lead Rating uses your leads' activity to show you which leads are your best bets, so you can prioritize your time
- Your leads' property search and viewing history is kept alongside your notes and tasks, all working together to help you close them

## Business Dashboard

Everything you need to monitor your performance and manage your time is provided in one screen.

- Track the percentage of leads with activity in the last 30 days
- Track the percentage of leads with email subscriptions
- See all the leads in your funnel and monitor their progress towards closing
- Learn which of your lead generation channels are producing the most leads
- See your tasks that are due today and other tasks scheduled for the week



## Tools To Help You Close

Smart, powerful, and simple features work together to keep you productive while staying out of your way.

- Keep all your tasks in a single To Do list
- Sync your tasks with your calendar
- Create Tags to track, filter, categorize, and instantly find your leads
- Locate tasks or groups or tasks with a variety of filter options
- Use filters to make changes & updates to multiple leads at once
- Track the stage of every lead with Pipeline Status to prepare your next steps



## More Mobile Power

Stay on top of your tasks with access to Agent CRM features in Optima Leads, our mobile app for agents.

- Add & update the Lead Stage in lead records as you move them closer to closing
- Add & update Tags in lead records to easily find them using filters
- Add notes with automatic time stamps & review them in your lead's History view

## A Complete Email Toolbox

Add more email marketing tools to engage, build trust, and grow relationships with your leads.

- Send newsletters or other custom email content to leads you choose
- Recognize your leads' birthdays & closing anniversaries with ready-to-use, automated emails
- Use a drag-and-drop editor to quickly build emails with images & embedded videos
- Add images from our stock image library
- Emails are sent from your own email address to avoid spam & junk email filters
- Track your email performance metrics

