Lead Manager Checklist

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1. Adding Users and Set Up (as an Admin)

   Users > New User

   A temporary password and username will be sent to the user via email. This password will only be accessible by the user. Go here http://docs.realgeeks.com/agents for additional information.

2. Configuring Email Integration

   Settings > Email Integration

   Go here http://docs.realgeeks.com/email_integration for additional information

3. Setting up Templates for Email and Text SMS Messaging

   Settings > Templates

IMPORTANT NOTE

* You will need to do this for **EACH** agent that wants to receive text notifications.

4. Setting up Lead Assignment for Agents and Lenders

   Settings > Lead Assignment

5. Enable Text Messaging

   Settings > Text Messaging

   Go here http://docs.realgeeks.com/checklist_sms_text_feature for additional information.

6. Setting up Third Party Integrations

   Settings > Third Party Integration

7. Adding Leads and Creating New Lead Sources

   Leads > New

   Here you can do a bulk lead import, add an agent, and create a new lead source