

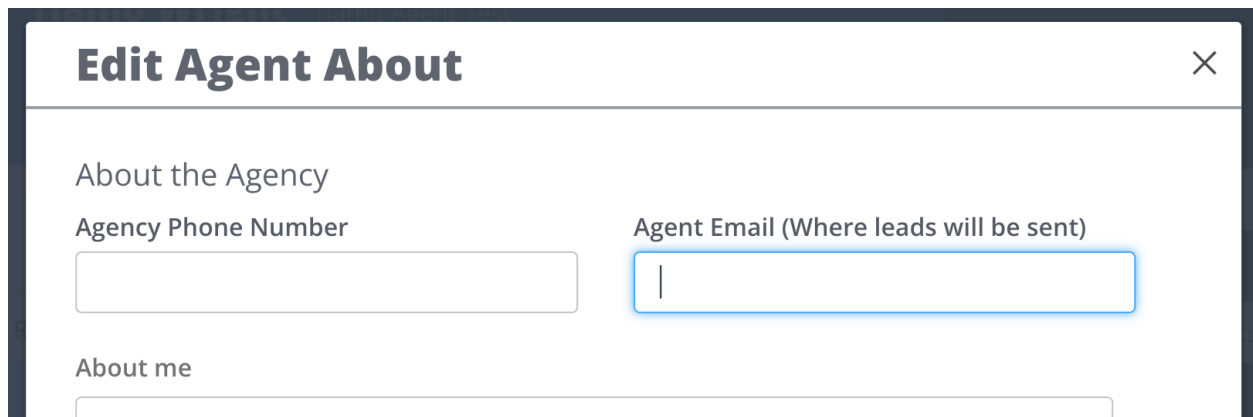
Lead Email Metadata for Agent Finder Leads

Does my CRM integrate with BiggerPockets lead emails?

- Check with your CRM to validate that they parse the lead emails with metadata. As of October 2022 we confirmed that FollowUp Boss and Boomtown do this.

How does it work?

- Once a lead is submitted through Agent Finder we send an email to the email you provided in your business account, screenshot below. If that email is also connected to your CRM then it will import the details the lead submitted to your CRM



The screenshot shows a web form titled "Edit Agent About" with a close button (X) in the top right corner. The form is divided into two main sections: "About the Agency" and "About me". Under "About the Agency", there are two input fields: "Agency Phone Number" and "Agent Email (Where leads will be sent)". The "Agent Email" field is highlighted with a blue border. Under "About me", there is a single large text input field.

What information is sent to the CRM?

- lead_name
- lead_email
- lead_phone
- lead_message
- lead_property_city
- lead_property_state
- lead_max_price
- lead_time_frame
- lead_financing
- This leaves out "number of investments" and "type of property".
- We will also include other fields required to conform with the specification, such as the following:
 - lead_information_version

○ lead_source

Example from Followup Boss

The screenshot displays the Followup Boss CRM interface. At the top, a navigation bar includes 'People', 'Inbox', 'Tasks', 'Calendar', 'Deals', 'Reporting', and 'Admin', along with a search bar. The main content area is divided into three columns:

- Left Column (Lead Profile):** Features a profile card for 'Tiamo Wright' (TW) with contact information: phone '(123) 441-1441 (mobile)', email 'tiamo@biggerpockets.com', and an 'Add address' button. Below this are sections for 'Relationships' (No relationships), 'Details' (Stage Lead, Source: biggerpockets.com, Agent: Tiamo Wright, Price: \$250,000, Tags: Add tag), 'Background' (Add background), and 'Social Profile' (Google Search Tiamo Wright).
- Middle Column (Activity & Notes):** Contains a 'Create Note' section with a text area and a 'Create Note' button. Below is a 'Property Inquiry' activity card from 8:31 am, detailing a lead from 'Bigger, CO' with contact information and 'Financing: Pre-qualified' status.
- Right Column (Task & Deal Management):** Lists various management areas: 'Tasks' (No upcoming tasks), 'Appointments' (No upcoming appointments), 'Files' (No files yet), 'Deals' (No deals yet), 'Collaborators' (No collaborators), 'Action Plans' (No action plans running), and 'Activity' (On website now, Recent Activity - View All (1), Bigger, CO).