



## About Leads Engine

### 1. What is Leads Engine?

- a. Leads Engine represents the future of lead routing. This improved product has a more user-friendly interface, addresses pain points to give brokers more control & flexibility over routing leads and helps them spend less time manually intervening on stalled leads.

### 2. What makes Leads Engine different?

- a. Leads Engine is purposefully built to help manage the entire lead lifecycle. It does so by focusing on the following core capabilities:
  - i. **Lead Ingestion** – Ability to receive leads from any source
  - ii. **Lead Routing** – Brokers ability to set custom business rules or leverage intelligent default logic
  - iii. **Lead Delivery** – Integration with multiple CRMs
  - iv. **Lead Tracking** – Tracking of the lead lifecycle
  - v. **Lead Conversion** – Intelligent automation to create efficiency and effectiveness.

### 3. How are the individual users that should be in the Admin Group being identified/defined?

- a. Once your company is onboarded to Leads Engine, the Admin Group will be automatically created within Group Manager. The company Admin will need to assign users to this group using the Add User feature.

## Accessing Leads Engine

### 4. How do I access Leads Engine?

- a. Once access is provisioned for your company, Leads Engine can be found on your brand's extranet site. A Leads Engine tile will be visible to those who have access.

### 5. Who can access Leads Engine?

- a. Brokers and Admin level personas only will have access to Leads Engine. Agents will not have access to Leads Engine.

### 6. How do I grant access to Leads Engine?

- a. For a user to gain access to Leads Engine, the user must be assigned a non-sales role in dash. This will enable a Leads Engine Manager role to the user's profile.

## Using Leads Engine

### 7. Where do I manage my company's leads?

- a. When accessing Leads Engine, you will first arrive at the Lead Manager. Here you can track and manage all leads. Lead Manager also features search and filter options to help you organize your leads and find the ones that need action.

### 8. Where do I go to manage how leads are distributed?

- a. Lead Distribution rules can be managed in Business Manager. These rules will determine how leads will be routed and how agents can accept leads.

### 9. How do I see my list of agents and update their lead profile details?

- a. User Manager displays a list of all affiliated agents and provides search by name capability. Selecting an agent will open their Agent Profile where you can view and update profile details and lead assignment criteria.

### 10. Where do I manage groups in Leads Engine?

- a. Group Manager allows you to set up Admin Groups or User Groups.
  - i. The Admin Group consists of individuals who will receive email notifications for leads requiring manual assignment.
  - ii. A User Group is a group of agents set up by the broker or admin that can be used with custom lead distribution rules to offer leads to.

### 11. Where can I access my company profile?

- a. From the navigation menu, click Settings then Company Profile.
  - i. View your company information.
  - ii. Select Available CRMs to enable availability and usage within Agent Profiles.

### 12. Can we configure areas served / zip codes for our agents?

- a. Absolutely. Your agents will inherit the zip codes of the office they are associated with (from dash). In User Manager, you can review and modify zip codes for an individual agent.

If you wish to apply changes to multiple agents or all agents, use the Bulk Update feature.

### **13. What else can I do with Bulk Update?**

- a. Bulk Update allows you to make mass updates to Agent Profiles. You can Apply Changes to All Agents or Select Agents And Apply Changes.

Updates can include Company Lead Enforcement, Primary Contact Info, Availability, Vacation, Lead Acceptance

You can also update Lead Distribution Criteria such as agent Languages, Price Ranges, Property Types and Areas Served.

### **14. What training resources are available?**

- a. A Leads Engine Quick Start Guide and Reference Guide will be available on your learning platform. eWebinars will also be available based on a schedule.

## **Lead Distribution**

### **15. Can I add a new lead source?**

- a. To add a new lead source, you must create a Help Desk ticket. The Support Team will collect necessary information to configure Leads Engine to accept and route leads from this source.

### **16. What is Jump Ball?**

- a. Jump Ball is a Lead Offering Method available when creating a custom Lead Distribution rule within Business Manager. Agents are offered the lead in groups of 10 and whoever accepts it first within the claim time gets the lead. If no one accepts the lead, the Admin will have to manually assign the lead.

### **17. What is Round Robin?**

- a. Round Robin is a Lead Offering Method available when creating a custom Lead Distribution rule within Business Manager. The offer goes through the list of agents until one accepts within the claim time.
  - i. Last Accepted: When an agent accepts a lead, they go to the bottom of the list
  - ii. Last Offered: When an agent is offered a lead, they go to the bottom of the list

**18. When creating a custom rule condition 'By Lead Channel,' the 'Form' dropdown can be left blank where all other dropdowns require values before saving and publishing. What does this mean?**

- a. When creating a custom rule condition using By Lead Channel, you are only required to select the Channel (website). With the Form dropdown, you can select a single form, create a second condition with another form from the same channel. Leaving the form selection blank will tell Leads Engine to include all forms from the channel.

**19. How do I route my Listing Agent leads?**

- a. You can specify how leads are prioritized between listing agents and agents within rule settings. Under Listing Agent Lead Offering you can instruct the routing to:
  - i. Offer lead to listing agent first, then find agent through company rules
  - ii. Find an agent through company rules
  - iii. Assign directly to listing agent

**20. What happens to a lead if it is received after hours?**

- a. Leads Engine routes 24/7. Any lead that comes in outside of your agents' hours of availability will be immediately routed to the Admin for manual assignment.

**21. How do I direct lead flow to Broker/Admin and not the agent rotation?**

- a. Go to Business Manager and select your Default Lead Distribution rule. In Find an Agent, go to the Lead Forwarding area and select "Forward lead to admin group."

## **Lead Manager**

**22. How do I search for leads within Leads Engine? How can I narrow my search?**

- a. In Lead Manager you can use the search bar to find leads by Case ID, Consumer name, phone or email.

You can also narrow your search by applying filters to find leads by status, engagement, agent, or date created.

**23. Can leads be assigned in bulk?**

- a. Yes. In Lead Manager, click the checkboxes next to the leads you want to assign. Once checked, click the "more" icon (3 dots) at the top of the lead queue. Here you can Assign to Agent, Assign to Admin Group or Close the lead.

**24. Is it possible to add notes to a lead?**

- a. Yes. Select the lead from Lead Manager and click the Add Note button. The note will create an entry within the lead's Event Log.

**25. What does the lead status "Actively Routing" mean?**

- a. Actively Routing status indicates that routing of a lead is in progress. Leads first entering the lead queue will have this status.

## **26. What does the double carat icon in the Event Log do?**

The double carat icon is used to simplify viewing of the Event Log by isolating desired events by type. The simplified view will hide generic events and tasks, keeping the more important events visible.

## **27. Where will agents receive lead information from?**

Lead offers are received via text message or phone call as set within the Agent Profile. Once an agent accepts a lead, or if a lead is assigned to an agent, they will receive a lead detail email.

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## **Contact Information**

For **Technical support**, please find your brand support team information at the bottom of [this page](#).

For **MoxiWorks** related issues, please visit our [Support Page](#) for more information.