

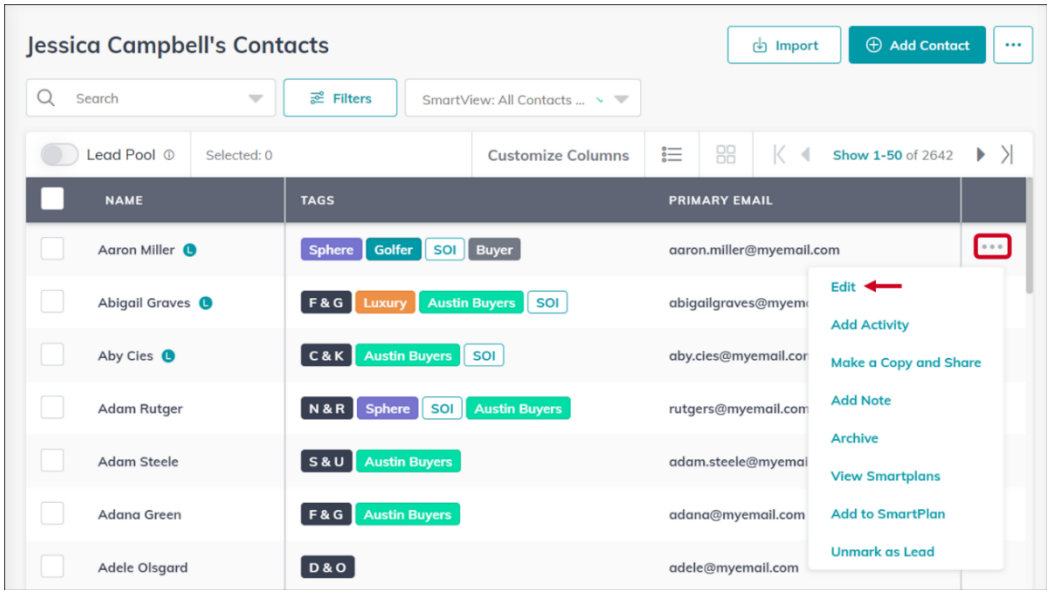
Adicionar Fontes de Leads Personalizadas aos Contactos

Embora o Command tenha muitas fontes de leads disponíveis para adicionar uma lead/contacto, o negócio de cada consultor é diferente, e reconhecemos que os utilizadores podem precisar de monitorizar fontes de leads que não tenhamos considerado. Os consultores têm agora a capacidade de criar fontes personalizadas de leads. Assim que tenhas criado uma fonte de lead, os consultores podem adicioná-los aos seus contactos.

Para adicionares fontes de contactos personalizadas:

1. Inicia sessão em <https://agent.kw.com> com as tuas credenciais de acesso Keller Williams.
2. Clica no **ícone Contacts** (Contactos), , no lado esquerdo da página.
3. Clica no **ícone das elipses**, , à direita do contacto, e selecciona **Edit** (Editar).

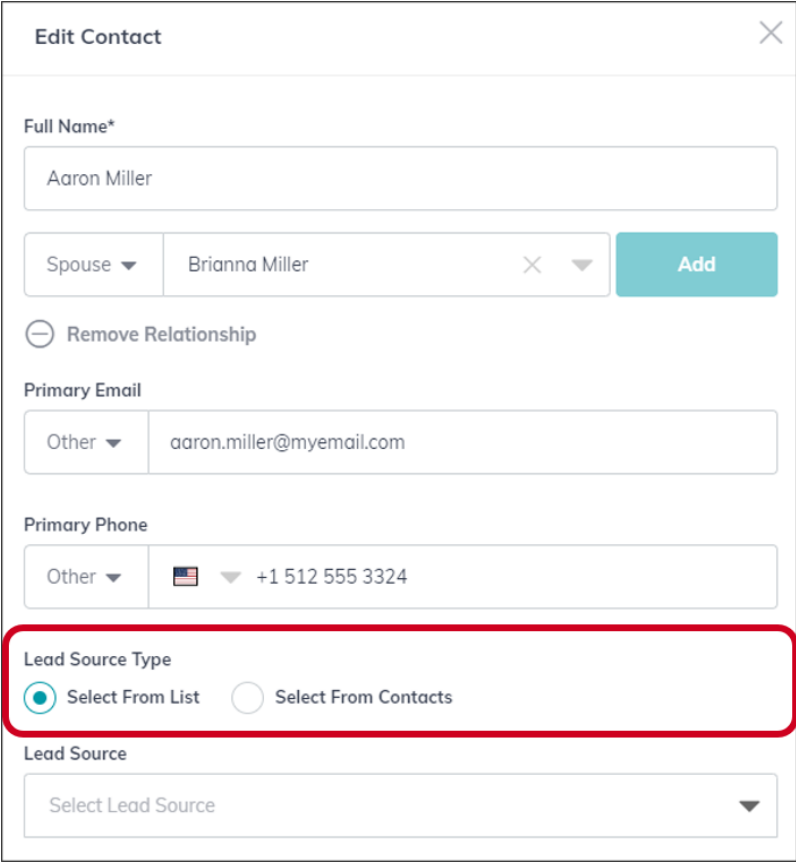
4.



The screenshot displays the 'Jessica Campbell's Contacts' interface. At the top, there are buttons for 'Import', 'Add Contact', and a menu icon. Below these is a search bar and a 'Filters' button. The main area shows a list of contacts with columns for 'NAME', 'TAGS', and 'PRIMARY EMAIL'. A context menu is open for the contact 'Adele Olsgard', showing options like 'Edit', 'Add Activity', 'Make a Copy and Share', 'Add Note', 'Archive', 'View Smartplans', 'Add to SmartPlan', and 'Unmark as Lead'. The 'Edit' option is highlighted with a red arrow.

NAME	TAGS	PRIMARY EMAIL
Aaron Miller	Sphere, Golfer, SOI, Buyer	aaron.miller@myemail.com
Abigail Graves	F & G, Luxury, Austin Buyers, SOI	abigailgraves@myemail.com
Aby Cies	C & K, Austin Buyers, SOI	aby.cies@myemail.com
Adam Rutgers	N & R, Sphere, SOI, Austin Buyers	rutgers@myemail.com
Adam Steele	S & U, Austin Buyers	adam.steele@myemail.com
Adana Green	F & G, Austin Buyers	adana@myemail.com
Adele Olsgard	D & O	adele@myemail.com

Em **Lead Source Type** (Tipo de Fonte de Lead), clica na opção **Select From List** (Selecionar A Partir da Lista).



Edit Contact

Full Name*

Aaron Miller

Spouse ▼ Brianna Miller X ▼ **Add**

Remove Relationship

Primary Email

Other ▼ aaron.miller@myemail.com

Primary Phone

Other ▼ +1 512 555 3324

Lead Source Type

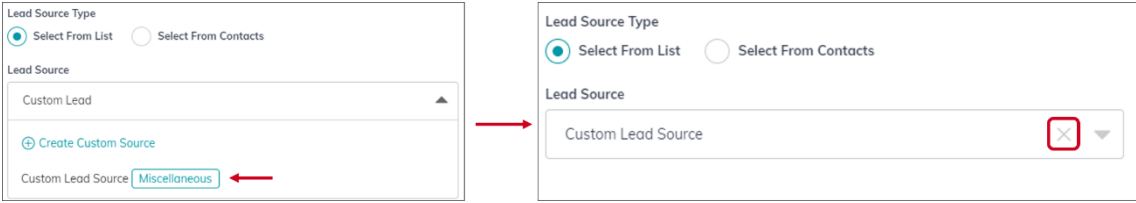
☒ Select From List ☐ Select From Contacts

Lead Source

Select Lead Source ▼

Adicionar uma Fonte de Lead Personalizada

1. Selecciona **Lead Source** (Fonte de Lead) a partir do menu suspenso. Podes remover uma fonte principal que tenha sido seleccionada clicando no ícone **X** ao lado dela.



Lead Source Type

☒ Select From List ☐ Select From Contacts

Lead Source

Custom Lead ▲

Create Custom Source

Custom Lead Source Miscellaneous

Lead Source Type

☒ Select From List ☐ Select From Contacts

Lead Source

Custom Lead Source X ▼

2. Clica em **Save** (Guardar) no final da página, quando terminares.

Lead Source Type

☒ Select From List ☐ Select From Contacts

Lead Source

Custom Lead Source

☒ Mark as Lead ☐ Add to Sales Pipeline

Tags

Sphere x Golfer x SOI x Buyer x

[+ Add More Information](#)

[Cancel](#) [Save](#)

Agora podes filtrar a tua base de dados com a tua fonte de lead personalizada e criar SmartViews para um acesso fácil.

Criar uma Fonte de Lead Personalizada

Se a fonte de lead desejada não estiver disponível, os utilizadores também podem criar fontes de leads personalizadas enquanto editam um contacto.

1. Escreve a fonte de lead no campo correspondente e depois clica em **Create Custom Source** (Criar Fonte Personalizada) no menu suspenso.

Lead Source Type

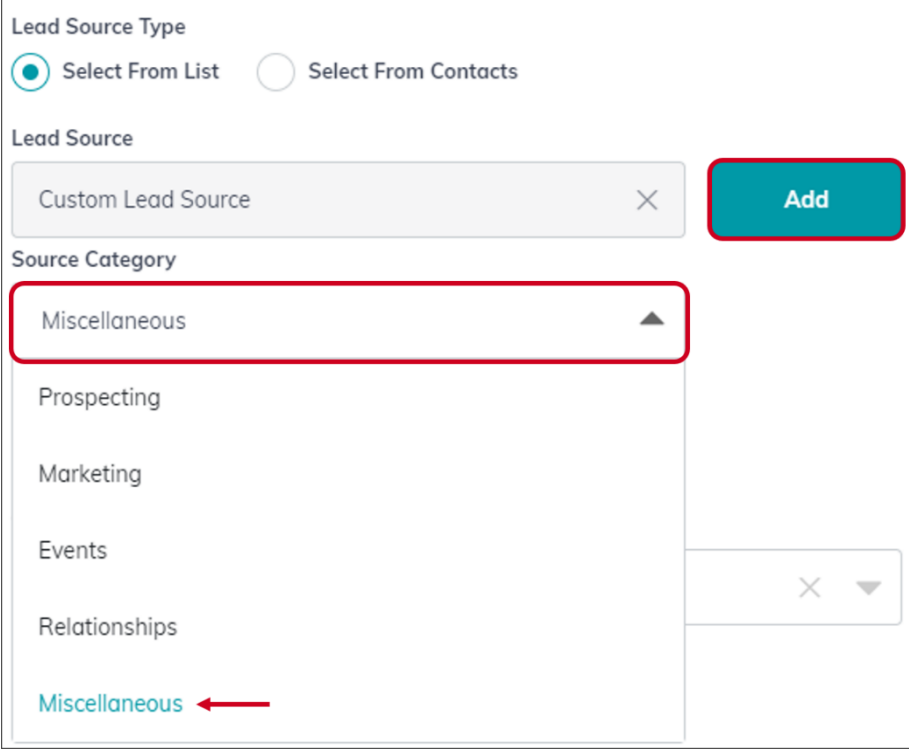
☒ Select From List ☐ Select From Contacts

Lead Source

Custom Lead Source

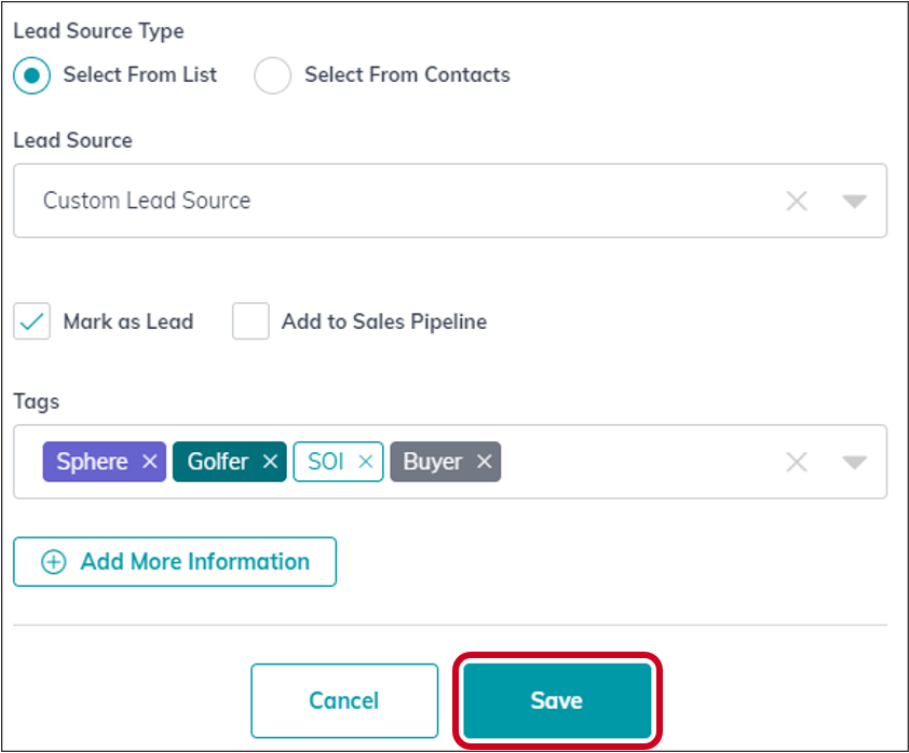
[+ Create Custom Source](#)

2. Selecciona o tipo de fonte de lead em **Source Category** a partir do menu suspenso
clica em **Add** (Adicionar).



The screenshot shows a form titled "Lead Source Type". At the top, there are two radio buttons: "Select From List" (which is selected) and "Select From Contacts". Below this is a "Lead Source" field containing the text "Custom Lead Source" and a close button (X). To the right of this field is a teal "Add" button. Below the "Lead Source" field is a "Source Category" dropdown menu. The menu is open, showing a list of categories: "Miscellaneous", "Prospecting", "Marketing", "Events", and "Relationships". The "Miscellaneous" option is highlighted with a red box, and a red arrow points to it. To the right of the dropdown menu is a close button (X) and a downward arrow.

3. Clica em **Save** (Guardar) no final do formulário assim que tiveres terminado.



The screenshot shows the same "Lead Source Type" form, but now the "Source Category" dropdown menu is closed. The "Lead Source" field still contains "Custom Lead Source". Below this field are two checkboxes: "Mark as Lead" (which is checked) and "Add to Sales Pipeline" (which is unchecked). Below the checkboxes is a "Tags" field containing four tags: "Sphere", "Golfer", "SOI", and "Buyer". Each tag has a close button (X). To the right of the tags field is a close button (X) and a downward arrow. Below the tags field is a button with a plus icon and the text "Add More Information". At the bottom of the form are two buttons: "Cancel" and "Save". The "Save" button is highlighted with a red box.