

Contactually 101: Step 6..... Creating your first Program

Programs are awesome! They are the part of Contactually that does automatic actions without you. Let's set up our first one. Let's set it up so that when those internet leads (remax.com, Trulia, etc.) come in, they automatically go into a bucket that will receive automatic emails.

Under the Programs tab at the top, you will see New Program on the left.

In Name type "Move to Internet Lead Bucket" and hit your tab button.

Click the green button labeled Add New Step.

Type "0" in the number of days box.

On the pull down list select Add to Bucket.

On the next pull down list select Internet Leads.

Uncheck the box that says Restart Waiting Period.

Uncheck the box that says Require My Approval.

Click SAVE.

Click I'M DONE EDITING.

Now, let's apply this Program to each of the following buckets: Zillow Leads, Realtor.com Leads, Trulia Leads, Homes.com Leads, IDX Broker Leads, Remax.com Leads, Diverse Solutions Leads, Leads Today Leads . Once applied, when a remax.com or Trulia lead comes in, it automatically goes to the Internet Lead bucket in addition to the remax.com Lead or Trulia Lead bucket.

Go to your Buckets tab at the top.

Using the gear sign on the top right of each bucket, select Edit Bucket.

Use the pull down menu under Start program when added to bucket, select Move to Internet Lead Bucket.

Click SAVE.