

# Cheatsheet

## Leads VS People

Contacts in active conversion.

Not actively buying or selling.

**THINK** Internet Leads, Open Houses, Prospective Clients

**THINK** Sphere, Collaborators, Other Agents, Your Team

## Tags

Tags are completely custom. Tag clients to help you easily find those contacts. Good example tags are Sphere, Investor, Cash Buyer, Closed 2018, Pie Giveaway, or any other short word or phrase.

## Intent

Brivity marks the Intent of leads as they come through from online sources. You can manually add/change intent.



## Status

Set a status to identify when a contact wants to move.

<b>New</b>	Status unknown: A lead who has not yet been contacted
<b>Unqual</b>	Attempted contact, no response
<b>Hot</b>	Moving in 1-3 months
<b>Nurture</b>	Moving in 3-12 months
<b>Watch</b>	Moving In 1 year or more out OR sphere you're nurturing
<b>Pending</b>	Client currently under contract
<b>Past</b>	Previous clients
<b>Inactive</b>	Not actively responsive
<b>Archive</b>	Stop all contact (DNC)
<b>Trash</b>	Bad/Fake contact information

**NOTE:** Inactive, Archived, and Trash statuses will hide people from your list views unless you've filtered to find them