Set Up The Autocaller Tool

Step 1 — **ADD THE AUTOCALLER TOOL**

To add the Autocaller Tool to your subscription, first you need to click on the Autocaller tab from the menu on the left-hand side of your dashboard.

Once you do that, you should click on the "Add Product" button and put in your credit card details to activate it.

Step 2 — **CONNECT THE PORTALS**

Once the Autocaller tool has been added to your plan, you can turn certain portals on and off for each of the lead types. If the shown toggle is set to on for Instant Valuation Leads, those leads will make the autocaller automatically ring you with the lead information.

LEADPRO

Set Up The Autocaller Tool

Step 3

SETTING UP OFFICES

To add or/and customize offices, navigate to the Offices tab from the main menu on the left-hand side of the dashboard.

Once you set up and choose an office you want to customize the Autocaller tool for, scroll to the bottom of the setting and tick the "Use custom configuration settings" box. Then it will be able to customize the lead sources and phone numbers used with the Autocaller only for that particular office.
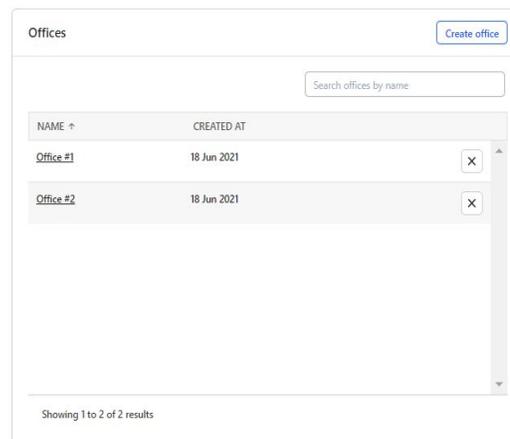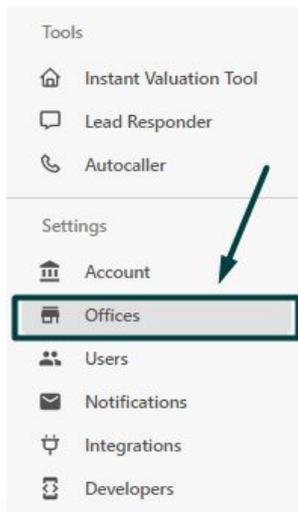
Step 4

EDIT OFFICE HOURS

Autocaller only works during office hours. Make sure to customize the office hours for each of the offices.

LEADPRO
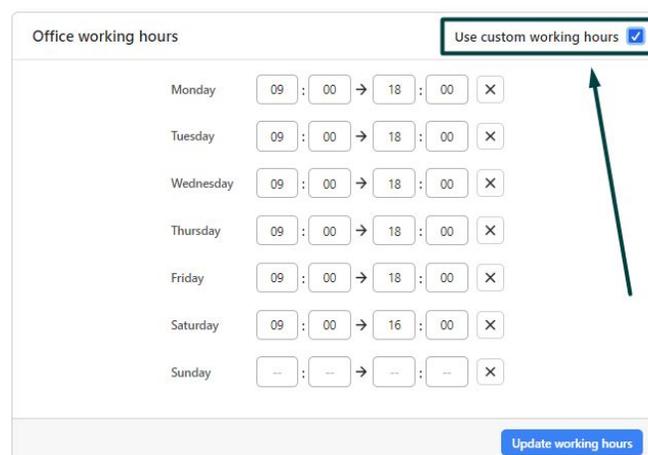
Set Up The Autocaller Tool

Step 5

KEYPRESS RULES (OPTIONAL)

Apart from setting up different autocaller phone numbers for each office, you can also handle multiple lead types for the same autocaller number with the use of keypresses.

You can set up different keypresses for different lead types (e.g. 1 for Vendor leads, 2 for Landlord leads). Once you edit the settings, make sure to save them by clicking on the tick button!

Autocaller   Use custom configuration ☑

Lead types & sources
Select the lead types and sources you want Autocaller to be enabled for.

Vendor Leads   ⌃

Contact phone Number   Keypress ⓘ

| 02000000000 | | 1 | 📞   ✓ |

🔵 📘 Instant Valuation Tool

Landlord Leads   ⌃

Contact phone Number   Keypress ⓘ

| 02000000000 | | 2 | 📞   ✓ |

🔵 📘 Instant Valuation Tool