



NEW = NEW

Contacts who have signed up on your website, either from an ad or some other lead source, such as an email import.

However, in **BoldTrail Pro**, there are 2 additional “starting points” for a lead. Those are Sphere and Prospect. Instead of importing your past clients and inactive leads into Archive, these statuses serve as two additional options to further segment your database.

Sphere: Contacts you know, who may or may not be searching for real estate.

Prospect: Contacts you’ve met or have information for, who you want to convert into a real estate lead. They are unresponsive or not actively searching right now, and your efforts are directed toward getting them to do so.

QUALIFY

The **Qualify** category does not have one corresponding status in **BoldTrail Pro**. Typically, in BoomTown, once you have reached out a lead at least once, you would switch the category to Qualify. In **BoldTrail Pro**, we’re actually going to **LEAVE** the lead in the **New** or **Prospect** status **UNTIL** they have responded to us/returned to our website.

When a **New** lead or **Prospect** responds to you their status will automatically change to **ACTIVE**.

Active Lead: Contacts who are actively returning to your website to view properties. Leads who respond to communication who have not responded before will automatically default to active status when they respond the first time (if not within the first 2 minutes of the lead’s creation in the CRM).



Timeline Categories

HOT | **NURTURE** | **WATCH**

BoldTrail Pro does not have corresponding Timeline statuses. We recommend that you utilize hashtags (which correlate most closely to BoomTown Tags) to identify your lead timelines. You'll find your Hashtag Manager under the Marketing tab in your CRM! You are welcome to title these timeline hashtags whatever you'd like, continuing to utilize BoomTown's categorization (Hot, Nurture, Watch) if that suits you/your team best - or - you can come up with something new (BuyingNow, 6+MonthsOut, 3-6Months, 2024, etc).

With that said, the closest status to **HOT** would likely be **Client** in the **BoldTrail Pro** system. However, you could sign a buyer/seller agreement with someone who might be further out in the process, so again, we recommend utilizing hashtags to further segment your database and identify lead timelines.

Client: Contacts you are actually working with, and showing homes, etc.

Resource: [How to Create + Apply Hashtags](#)

PENDING = CONTRACT

Contacts who are in the buying or selling transaction process. **If a transaction management system is integrated with BoldTrail Pro (ex: DotLoop, Skyslope, or DocuSign) and a contact matches, their status will automatically update and indicate that they are tied to an existing transaction.**

CLOSE = CLOSED

These clients have completed a transaction.

ARCHIVE

Your **Sphere** Contacts should be categorized as **Sphere** and **Unresponsive Leads with valid contact information** should be categorized as **Prospect**. Why? See below

TRASH = ARCHIVE

At **BoomTown**, we had a **TRASH** category. **BoldTrail Pro** does not. Therefore, **Archive** should contain the contacts you don't intend to work or communicate with. Moving a contact to this status will unsubscribe them from any further automated communication.

Additional Lead Organization Tools to Consider

LEAD TYPE = DEAL TYPE

The Deal Type in **BoldTrail Pro** is the equivalent of Lead Type in **BoomTown**. This detail refers to the type of contact that you are working with regardless of where they are in the buying/selling process. In **BoomTown**, you are used to Buyer, Seller, or Buyer/Seller. **BoldTrail Pro** offers the following:

- **Buyer**
- **Seller**
- **Renter**
- **Vendor**
- **Agent**

Because a seller lead can turn into a buyer after their sale closes and a fellow agent could need your help with a home purchase of their own, each contact in your Smart CRM can have more than one lead type as necessary.



SOURCE = SOURCE

In both systems, the **Source** will identify where the lead/ contact originated from. Just as in **BoomTown**, once a source has been identified in **BoldTrail Pro**, it CANNOT be changed.

ADDITIONAL RESOURCES

- [Contact Statuses Overview](#)
- [Lead Types Overview](#)
- [Contact Record Overview](#)
- [Admin Overview](#)
- [Importing Your Contacts](#)