



Agent CRM

Take control over your business growth.



IDX Integration

Your IDX website and CRM work together as a single, integrated system to help you optimize your opportunities and work more productively.

- Keep all lead information in one, easy-to-use system
- Lead Rating uses your leads' activity to show you which leads are your best bets, so you can prioritize your time
- Your leads' property search and viewing history is kept alongside your notes and tasks, all working together to help you close them

Business Dashboard

Everything you need to monitor your performance and manage your time is provided in one screen.

- Track the percentage of leads with activity in the last 30 days
- Track the percentage of leads with email subscriptions
- See all the leads in your funnel and monitor their progress towards closing
- Learn which of your lead generation channels are producing the most leads
- See your tasks that are due today and other tasks scheduled for the week



Tools To Help You Close

Smart, powerful, and simple features work together to keep you productive while staying out of your way.

- Keep all your tasks in a single To Do list
- Sync your tasks with your calendar
- Create Tags to track, filter, categorize, and instantly find your leads
- Locate tasks or groups of tasks with a variety of filter options
- Use filters to make changes & updates to multiple leads at once
- Track the stage of every lead with Pipeline Status to prepare your next steps



More Mobile Power

Stay on top of your tasks with access to Agent CRM features in Optima Leads, our mobile app for agents.

- Add & update the Lead Stage in lead records as you move them closer to closing
- Add & update Tags in lead records to easily find them using filters
- Add notes with automatic time stamps & review them in your lead's History view

A Complete Email Toolbox

Add more email marketing tools to engage, build trust, and grow relationships with your leads.

- Send newsletters or other custom email content to leads you choose
- Recognize your leads' birthdays & closing anniversaries with ready-to-use, automated emails
- Use a drag-and-drop editor to quickly build emails with images & embedded videos
- Add images from our stock image library
- Emails are sent from your own email address to avoid spam & junk email filters
- Track your email performance metrics

