



# Introducing *PortalPal*

Step-by-step guide

THE  
*ValPal*  
NETWORK

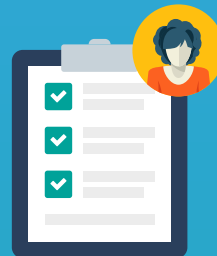
# How does PortalPal work?



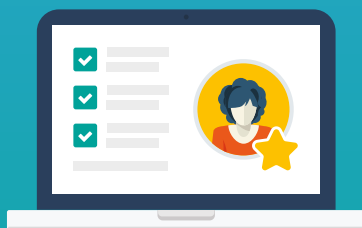
Portal lead comes in



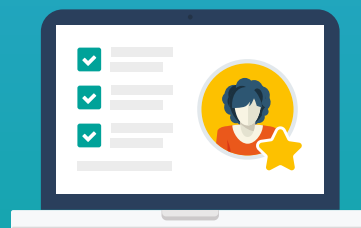
PortalPal emails applicant



Applicant fills in survey



Agent gets hot lead



Supplier gets hot lead



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You (the agent) set up auto-forwarding on all of your incoming portal leads, so PortalPal receives them as well and can work in the background.

## How to set up auto-forwarding

- ▶ Firstly, you'll need to log in to your Outlook account as an administrator.
- ▶ On the menu, you'll then need to select **Admin Centers** on the dropdown, followed by **Exchange**.
- ▶ Once you're in the Exchange Admin Center, you'll need to select **Mail Flow** which allows you to set up the required rule for auto-forwarding.
- ▶ Next, you'll see the Rules tab, hit the **+** dropdown and select **Create a new rule**.
- ▶ You'll then be asked to set the rule name. We recommend you call it 'PortalPal Auto-forwarding' or something similar.
- ▶ When you're asked to **Apply this rule if...**, select **The sender address includes...**
- ▶ Then you'll need to add an email address for Rightmove (**autoresponder@rightmove.com**), for Zoopla (**members@zpg.co.uk**) and for OnTheMarket (**no-reply@expert.onthemarket.com**). Click **Save** and you're nearly done.
- ▶ Next up, you'll need to choose **BCC message to...** in the **Do the following...** section. Then enter the email address '**leads@portalleads.thevalpalnetwork.co.uk**' into the Check names box and click **Ok**.
- ▶ Hit **Save** and your auto-forwarding rule will be set up and ready to go.



**Not using Outlook or unable to set up at server level?**

[Click here](#) to see more autoforwarding instructions to find the right solution for you

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We've leveraged the power of The ValPal Network to get you the best possible supplier deals!

**Choose our suppliers or plug in your own:**



The **Moving Hub** 

Conveyancing: Get paid upfront with no claw back!



**Mortgage  
Advice Bureau**

One of the biggest, most trustworthy mortgage companies in the UK - could you earn more?



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The applicant receives an instant email from PortalPal.



Hi John Smith,

Thank you for your enquiry, we will be in touch with you shortly.

In the meantime, to progress your enquiry and book a viewing online, [click below](#) to answer a few questions that will help us better assist you in your property search.

[BOOK A VIEWING ONLINE](#)

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Applicant fills in either the tenant or buyer survey while PortalPal identifies potential landlords and vendor leads and creates additional revenue through referral services.

Test the surveys for yourself:

BUYER SURVEY

TENANT SURVEY

## 1. What are your current circumstances?



Cash buyer



Mortgage arranged



Need a mortgage

Are you happy to receive information and rates on mortgages?

*Our mortgage partner [insert mortgage partner] can work with you to give you the best advice and most competitive rates to make your move as easy and stress-free as possible. If you're happy to be contacted by them, please select yes.*

Yes

No

## 2. What is your budget?

Between

£

and

£

## 3. What is your current living situation?

Owner Occupied

Renting

## 4. What is the purpose of your property search?

To live in

Buy to let

Investment

Second home

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The applicant is sent a thank you email driving them back to your website, essentially stealing traffic from the portals.



Thank you for your enquiry. We will be in touch shortly.

In the meantime, we have similar properties you might be interested in on our site and our branch details are below should you need to contact us - we are here to help.



See more of our properties to rent



[SEARCH NOW](#)




Your phone number  
Your email address  
Your web address



480 High Street  
Southwark, London, SE12EH  
Sales Properties | Lettings Properties

You (the agent) receive a hot lead straight into your inbox with the completed survey and the highlights that PortalPal has uncovered.





 **HOT LEAD!**

This buyer has requested a **market appraisal** at the following time slot:

 **Thursday, 9th May 2019**  **PM**

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This buyer has booked a **viewing** at the following time slot:

 **Wednesday 8th May 2019**  **AM**

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The applicant is a **cash buyer**  
The applicant is **renting through a private landlord**  
The applicant **has provided landlord details**

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The applicant has shown an interest in the following services:

**Conveyancing**      **Mortgages**      **Surveying**

Don't worry, we've passed these on to **your suppliers** already!

**CALL THEM NOW!**

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<b>Lead Details</b>	<b>Landlord Details</b>
Name: John Smith	Email: <a href="mailto:johnbloggs@email.co.uk">johnbloggs@email.co.uk</a>
Email: <a href="mailto:johnsmith@email.co.uk">johnsmith@email.co.uk</a>	Phone: 020 8495 0033



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Your chosen supplier gets an email with the lead details courtesy of you, the agent.

**PortalPal**



 **HOT LEAD!**

You've received a new **utilities lead** courtesy of



**CALL THEM NOW!**

They have opted in to hear from you about assisting them with their utility needs.

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### Lead Details

Name: Joe Bloggs

Email: [jbloggs@gmail.com](mailto:jbloggs@gmail.com)

Phone: [07521 345670](tel:07521345670)

**Summary:** Get paid on referrals, identify new vendors and landlords, save time and pre-qualify your portal leads!

