



# FreedomSoft

## Top 10

# Feature Updates From 2019

Converting More Leads  
Into Profit!

# Top 10 Favorite Freedom\$oft Feature Updates From 2019

Hey, Rob Swanson here, CEO of Freedomsoft and I'm excited to share my Top 10 picks for the best, most-valuable, and most used new feature updates from 2019.

If you don't religiously follow the Freedomsoft feature development and release schedule, you can get a short and quick summary here in this report.

On top of the simple to use, robust, and fully customizable system that Freedomsoft is already, every new feature we develop is designed to add value and make the lives of our Users better.

And, with each new feature development, Freedomsoft's feature rich system becomes more and more powerful in 4 key areas that we put a ton of time in planning, developing, and optimizing:

- (1) Lead Generation,
- (2) Lead Management,
- (3) Lead Automation,
- (4) Lead Conversion.

We have invested time, money, and resources to keep Freedomsoft at the top and we continue to do that every single month by listening to our Users.

In fact, our entire 2019 development roadmap was directly influenced by the feedback, interaction, conversations, and suggestions of our Users.

We love feedback and use it every day. So, if you're reading this as a current User, and you've shared feedback to help us improve - we Thank You.

As you dive into my Top 10 list, you might be asking: Are these the only features Freedomsoft worked on in 2019?

THE ANSWER: Not even close. Our product and development team works long, hard hours to make Freedomsoft what it is today. This is just my personal 2019 Top 10 List of Favorites.

Enjoy!

Now go create some freedom,



Rob Swanson, CEO

# 2019 Favorite Feature #10

## Live Answer & Call Forwarder

### Routing Schedules

Your significant other may like the development of this feature even more than you and I do, I know mine does.

If you're like most people, you know how hard it can be to "turn-off" the urge to pick up the phone when it rings. That's where Freedomsoft's Phone Routing saves the day.

Whether you want to initiate Live Answer for your entire team starting at 8 am, automatically forward to an answering service at 5 pm, or set-up your schedule to go straight to voicemail after 8 pm, Freedomsoft's Phone Routing Schedule tool is powerful.

The tool allows you to set-up custom routing schedules for every phone in your Freedomsoft system with as many, or as few automated scheduling changes as you want.

You can customize every day to be different, set-up Live Answer and Call Forwarding at the same time, or on different schedules, and much more. The flexibility is awesome.

This feature got a big ole thumbs up from our Users when we first released it and we get regular comments about how awesome it is to be able to manage the phone system so robustly, yet, so simply.

We are confident you'll love it too.

Voicemail    Upload custom message

### Setup Call Forwarding / Live Answer

Forward to: Phone Number

Number: (303) 555-1212

Schedule:

Sun	Mon	Tue	Wed	Thu	Fri	Sat
-----	-----	-----	-----	-----	-----	-----

Starting: 09:00am    Ending: 05:00pm    Timezone: (GMT-06:00) America/Indiana/...

Add Timeframe    Cancel

# 2019 Favorite Feature #9

## DNC List Management plus DNC & Litigator Flags

With the addition of FreedomSkip and because of Freedomsoft's robust, built-in Phone & SMS system, we knew we wanted to (and needed to), make it simple for Users to manage their internal DNC (Do Not Call) lists, as well as provide DNC and Litigator flags for skip traced leads.

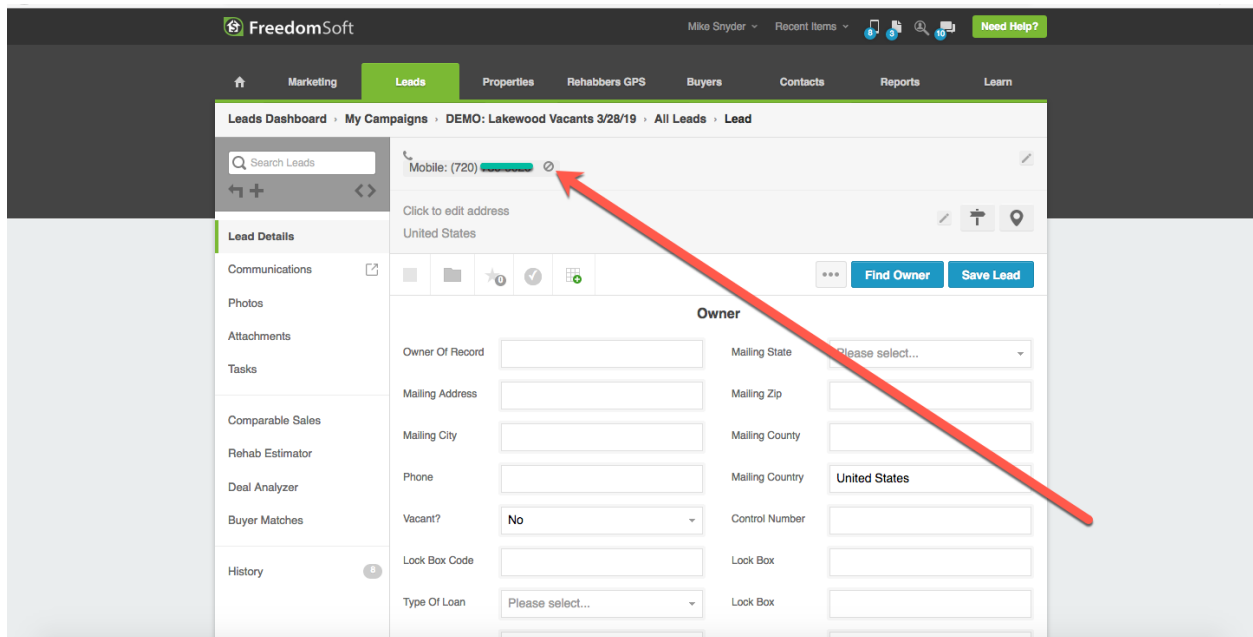
Let's start with your internal DNC list. Anytime someone tells you to "take them off your list", it's as simple as clicking the DNC Icon which is attached to every phone number in the system.

After clicking that Icon, the associated phone number will turn **RED** and be immediately added to your DNC List, which you can find under the Freedomsoft Reports tab.

Adding a phone number to the DNC list immediately removes that number from the various marketing tools inside Freedomsoft, so you and/or your team can't "accidentally" contact that number again.

And, as you know, sometimes people change their mind and contact you again in the future. When that happens, Freedomsoft will still capture that inbound message (call, voicemail, or text message) and add it to the lead record.

You'll see the number highlighted **RED** (meaning it's on your internal DNC list) so you have the flexibility to decide your next steps.



**DNC Icon Is Clickable Making It Simple To Add Numbers To Your Internal DNC List**

Second, let's take a look at the DNC & Litigator flags you get on your phone numbers when you use FreedomSkip.

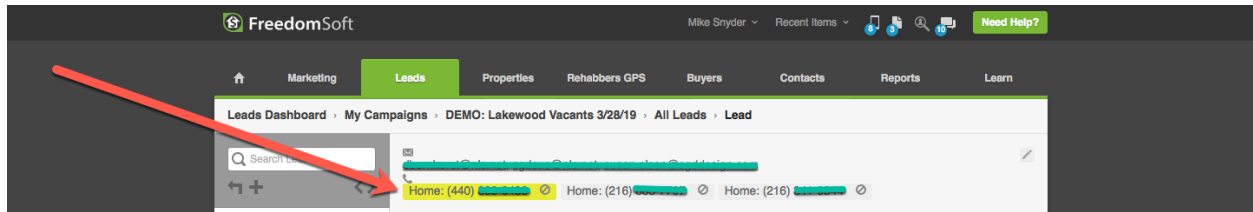
When you skip trace a lead using FreedomSkip, you can add a State and National DNC flag, as well as a Known Litigator flag to help identify numbers that have been party to TCPA (Telephone Consumer Protection Act) litigation.

The numbers you get back from FreedomSkip are marked with a colored background and a pop-up identifier when you hover over a number, such as:

Yellow Flag = Is a number on the State / National DNC list

Orange Flag = Is a number identified as a Known Litigator

Red Flag = Is a number you placed on your internal DNC list



**Numbers That Have Been Skip Traced Using FreedomSkip Are Color Flagged For Easy Identification**

Freedomsoft automatically suppresses all numbers that you add to your internal DNC list.

And, the marketing tools inside Freedomsoft allow you to easily suppress numbers on the State/National DNC list (as needed), or that have been identified as a Know Litigator (if desired).

## **2019 Favorite Feature #8**

### **Easily Distribute Leads Between Lists, Campaigns, & Workspaces**

Our thousands of Users range from solo-operators, to small teams who need permission based campaigns and simple tracking, to large operations with team up to and over 55+ people working from two offices and operating in multiple different markets.

Organizing and controlling permission based access to lists, campaigns, and workspaces is critical. One feature that helps Freedomsoft Users accomplish the goal of optimizing their entire team is the “Distribute To” and “Remove From” functions.

The “distribute function” allows you to quickly and easily distribute leads from any Lead Campaign, to another...

...or into a permission controlled Workspace you’ve set-up for a single team member for cold calling, prospecting, or follow-up. Distribute to always maintains the tracking, and reporting integrity of your source campaign so you always know how your marketing is performing.

Removing a lead from a Campaign or Workspace (for example if a team member leaves and you want to redistribute to another workspace), is just as simple, Simply Select the lead, Click the Remove from button. It's that simple.

Leads Dashboard > My Campaigns > DEMO: Lakewood Vacants 3/28/19 > All Leads

Control Number	Address	City	Zip	Campaign Name	Primary Contact Phone	Mailing State	Last Updated	Created At
2179 OLIVE AVE	LAKEWOOD	44107	WORKSPACE: Ryan H.		Ohio	Mar 28, 2019	Mar 28, 2019	
2104 WASCANA AVE	LAKEWOOD	44107	WORKSPACE: Ryan H.		Ohio	Mar 28, 2019	Mar 28, 2019	
2196 NORTHLAND AVE	LAKEWOOD	44107	WORKSPACE: Ryan H.		Ohio	Mar 28, 2019	Mar 28, 2019	
12700 LAKE AVE APT 2006	LAKEWOOD	44107	WORKSPACE: Ryan H.		Ohio	Mar 28, 2019	Mar 28, 2019	
1291 BEACH AVE	LAKEWOOD	44107	DEMO: Lakewood Vacants 3/28/19		Ohio	Mar 28, 2019	Mar 28, 2019	
18310 CLINTON BLVD	LAKEWOOD	44107	DEMO: Lakewood Vacants 3/28/19		Ohio	Nov 18, 2019	Mar 28, 2019	
146 WESTWOOD AVE	LAKEWOOD	44107	DEMO: Lakewood Vacants 3/28/19		Ohio	Mar 28, 2019	Mar 28, 2019	
2022 MAGEE ST	LAKEWOOD	44107	DEMO: Lakewood Vacants 3/28/19		Ohio	Mar 28, 2019	Mar 28, 2019	
1567 PARKWOOD RD	LAKEWOOD	44107	DEMO: Lakewood Vacants 3/28/19		Ohio	Mar 28, 2019	Mar 28, 2019	
12700 LAKE AVE APT 609	LAKEWOOD	44107	DEMO: Lakewood Vacants 3/28/19		Ohio	Mar 28, 2019	Mar 28, 2019	
1464 RIVERSIDE DR	CLEVELAND	44107	DEMO: Lakewood Vacants 3/28/19		Ohio	Mar 28, 2019	Mar 28, 2019	
2089 WYANDOTTE AVE	CLEVELAND	44107	DEMO: Lakewood Vacants 3/28/19		Ohio	Mar 28, 2019	Mar 28, 2019	

**Easily Distribute Leads To Your Team (Do It Automatically - See Feature #4 in the report)**

## 2019 Favorite Feature #7

### Managing Lists & Tracking Leads

Everyone has a little different idea when it comes to tracking marketing lists, with a lot of people tracking campaign costs, cost per lead, conversion rates, and revenue per contract - to name a few.

Some people track everything, others don't track anything. One of the fun parts of running a software company is listening to the needs and wants of our Users, and figuring out how to solve the various challenges they bump into on a daily basis.

As more and more people started to utilize and understand the List, Campaign, and Workspace set-up inside Freedomsoft, one of the challenges in 2019 that Users asked us to solve, was a way to handle 'records' differently than 'leads'.

In short, a record is part of a list that you will use for marketing, whereas a lead is a record that responds to that marketing.

Software by itself doesn't know the difference between a record and a lead until a human defines the rules.

While we could certainly have "forced" our definition of a record vs. a lead onto the software, and thus onto our Users, we didn't feel like that was in alignment with the flexibility we were wanting to offer people.

Different people define things differently, but at the same time expect automated tracking and expect the software to know when a new lead is captured.

Are you seeing the challenge?

We couldn't lock down the definition and force it on Users, but at the same needed it to function in a way that the software knows when a new lead hits your dashboard for reporting.

We solved it with a combination of automated lead tracking, and a manual override option.

The screenshot shows the FreedomSoft interface with the 'Leads' tab selected. The breadcrumb trail is: Leads Dashboard > My Campaigns > CAMP: 38127 Vacant - 01/28/2020 > All Leads > Lead. The lead details for '5547 [redacted] RD MEMPHIS, Tennessee 38127' are shown. The 'Source' dropdown is set to 'Lead Finder'. The 'Status' is 'Warm Follow-up'. The 'Acquisitions Rep' is 'Please select...'. The 'Lead Count' icon is highlighted with a red box, and a red arrow points from it to the 'Source' dropdown.

Freedomsoft Automatically Recognizes All Inbound Leads & Adds The Lead Count Icon Marking It As A Lead

Let me explain a little more.

Marking a record as a lead, counts that lead in your Lead Campaign, as well as in your overall company Lead Dashboard stats reports.

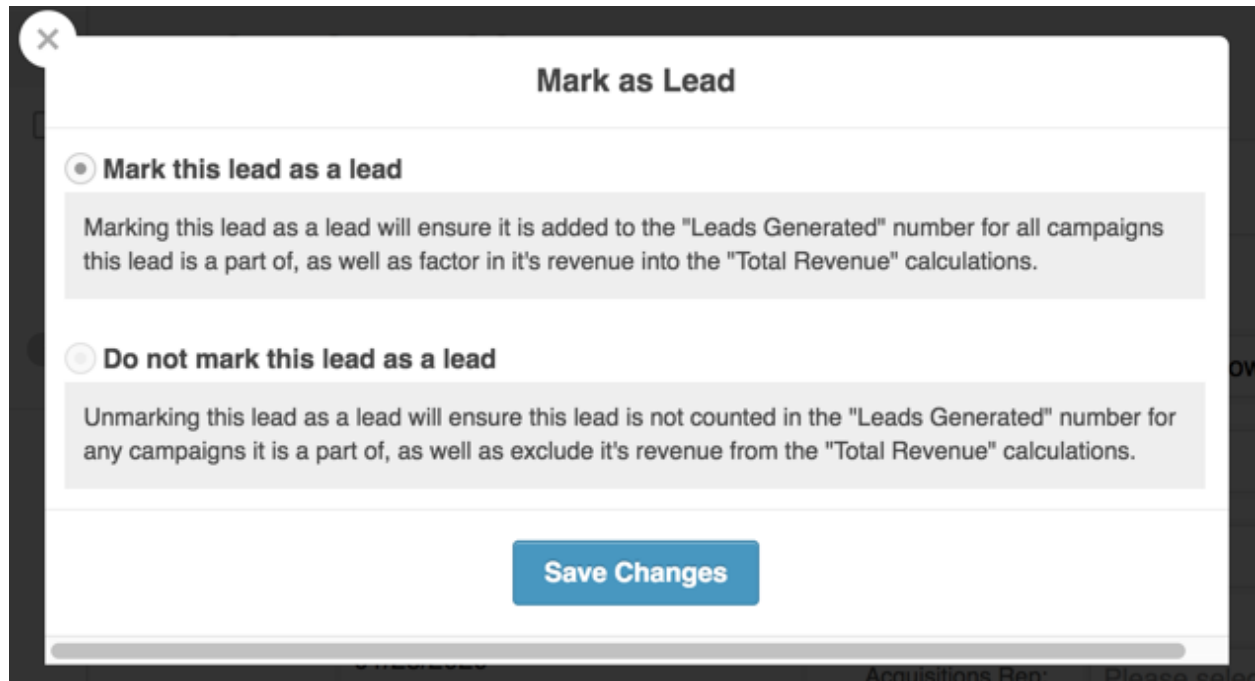
On every Lead Campaign, the number of leads is used to automatically calculate campaign stats such as cost per lead, revenue per lead, conversion rates, and more.

1200 Campaign Size	236 Leads Generated	19.7% Response Rate	0 Leads To Properties
\$450.00 Campaign Cost	\$1.91 Cost Per Lead	\$0.00 Total Revenue	\$0.00 Revenue Per Lead

Sometimes, especially when comparing the performance of different Lead Campaigns, it's important to make sure that the leads are counted correctly.

Providing Users the flexibility to override mark or unmark a record as a lead, allows Users to manually manage the lead count and maintain highly accurate statistics across all lists, campaigns, and workspaces.

People love the ability to manage the accuracy of all lead campaigns



**Mark as Lead**

☒ **Mark this lead as a lead**

Marking this lead as a lead will ensure it is added to the "Leads Generated" number for all campaigns this lead is a part of, as well as factor in it's revenue into the "Total Revenue" calculations.

☐ **Do not mark this lead as a lead**

Unmarking this lead as a lead will ensure this lead is not counted in the "Leads Generated" number for any campaigns it is a part of, as well as exclude it's revenue from the "Total Revenue" calculations.

**Save Changes**

## 2019 Favorite Feature #6

# Custom Merge Fields Added To SMS Broadcast & Follow-up Marketing

Text messaging (SMS) has become a very popular way to communicate with people and it doesn't look like that is changing any time soon.

Freedomsoft allows you to customize your leads dashboard in any way you desire by adding Custom Fields for anything.

Then, those custom fields can be automatically inserted into your text message marketing and follow-up by inserting the merge field into the message template.

It's awesome.

A customized, more personalized message almost always gets a higher response of more qualified leads than a more generic message.

Using the merge field variables in your message template, you can insert anything with popular fields being Property Address, Primary Contact's First Name, a Neighborhood name, a Zip Code, and more. Be creative.

It's as simple as selecting the Custom Field from the drop down menu as you create your message and then Freedomsoft handles the rest, customizing each message for the unique information stored on that lead record.

Compose SMS Broadcast/Dialer

Recipients: All Confirmed Buyers (3)

From: Please Select

Message: You - Seller Leads / Properties / Rehabbers GPS - Buyer Leads / Buyers -  
Hey {property\_first\_name} it looks like you own a property at {property\_address}. You wouldn't be interested in selling would you?

132 characters  
Character count may be different in the final message if variables are used.

☒ Remove duplicate numbers  
☐ Send to mobile numbers only

NOTE: You can ONLY use the DNC and Litigator flag removal options below if you used the FreedomSoft skip trace system and included those flags in your order.

☐ Remove numbers with DNC flag  
☐ Remove numbers with Litigator flag

Next

## 2019 Favorite Feature #5

### Audit Trail For Digital Signatures

While many people know that Freedomsoft is designed as an all-in-one lead getting and conversion system for real estate investors, that allows people to cancel (on average) 3 to 5 other 3rd party systems saving \$150 to \$650 per month...

...many more people have yet to see Freedomsoft's built-in digital signing tool.

The digital signing tool in Freedomsoft allows you to use the Document Generator to generate a document, such as a Purchase & Sale Agreement, (or any document you want by simply uploading it into the system) with just a few clicks of your mouse...

...and then instantly, with no export or import needed, send the document to one or more parties for signature.

It's fast and simple.

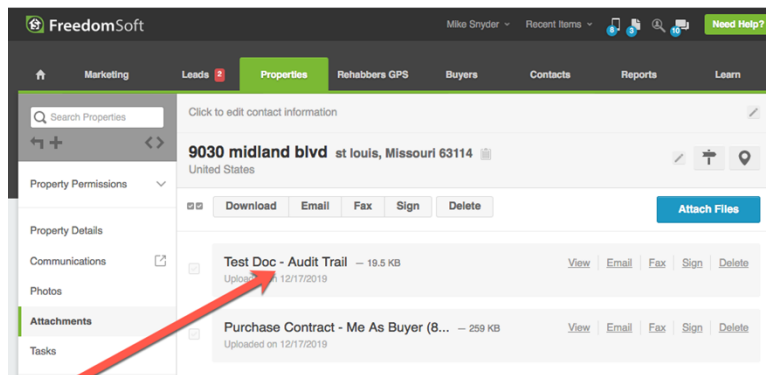
### Freedomsoft's Digital Signing Tool Makes Getting Signed Paperwork Simple

When the document is signed by all parties, it is immediately added to your lead record and marked as “Signed”. You’ll never misplace or lose an important document again.

Even more importantly, if you’re working with a small team, you’ll always have instant access to their signed documents which will be automatically attached in the Attachments section of the correct lead record.

If you’ve ever tried to get your team to follow the process and upload their documents to stay organized, you’ll immediately recognize the benefit of this built in system.

But, as good as all that is, it’s not the feature improvement I’m adding to my Top 10 list for 2019 - my add, related to the digital signing tool has to do with the Signature Audit Trail.



Digital signing has become an important part of everyday business, and, being able to track, re-trace, and prove the validity of a digitally signed document (especially in real estate), doesn’t seem important, until you figure out why it’s important.

So, we added a digital signing audit trail as a separate attachment that gets automatically attached to the lead record when the document is complete. Take a look:



TITLE	Purchase Agreement 22- [REDACTED]
FILE NAME	Purchase__Sale_Agreement__Buying_040119_.pdf
DOCUMENT UUID	d21aeb37-3e16-4502-a516-25fc4032c933
STATUS	Complete

## Document Timeline

Uploaded	May 07, 2019 21:16:47 UTC	Uploaded by John [REDACTED] ([REDACTED]@freedomsoft.com) IP: 67.176.125.134
Sent	May 07, 2019 21:16:50 UTC	Sent to John [REDACTED] ([REDACTED]@freedomsoft.com)
Viewed	May 07, 2019 21:17:11 UTC	Viewed by John [REDACTED] ([REDACTED]@freedomsoft.com) IP: 67.176.125.134
Signed	May 07, 2019 21:17:37 UTC	Signed by John [REDACTED] ([REDACTED]@freedomsoft.com) IP: 67.176.125.134
Sent	May 07, 2019 21:17:37 UTC	Sent to Robert [REDACTED]@yahoo.com)
Viewed	May 07, 2019 23:47:19 UTC	Viewed by Robert [REDACTED]@yahoo.com) IP: 174.63.247.79
Signed	May 07, 2019 23:51:20 UTC	Signed by Robert [REDACTED]@yahoo.com) IP: 174.63.247.79
Completed	May 07, 2019 23:52:06 UTC	The document was completed

The audit trail tracks everything with a unique ID #, and date and time stamps all actions throughout the signing process. If you ever have an issue with a digitally signed document, the audit trail document will become an important part of your proof.

## 2019 Favorite Feature #4

# Manual, Bulk, & Automated Lead Management Tools

Lead Management is critical to the success of every real estate investor.

From way back in the day when my only Lead Management options were to stay organized in a "leads notebook", to today with powerful tools at your fingertips, Lead Management is key.

I say it all the time:

If you're not making offers, you're not making money.

...but, the action of making offers gets lost in the shuffle when your leads are disorganized.

That's why at Freedomsoft, we believe in Organization BEFORE Automation.

Yep, you read that right.

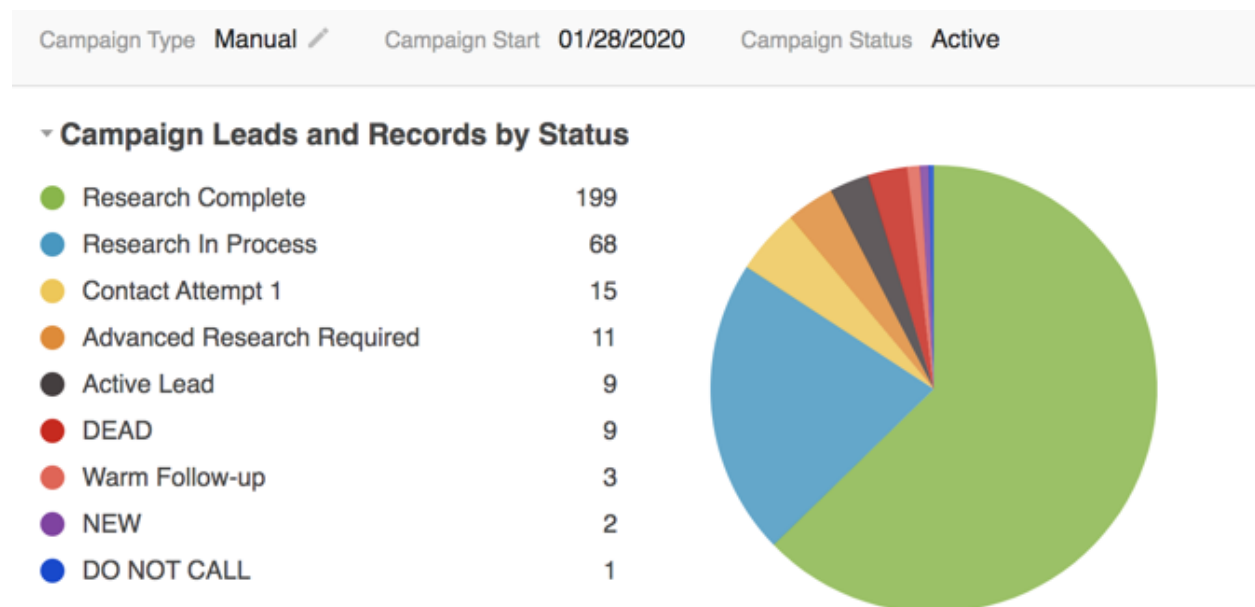
We love automation (and you'll see that below)...

...but we have seen it too many times when someone starts with a disorganized Lead Generation strategy, that results in a completely disorganized Lead Management effort, that is often times riddled with so much automation that no-one knows what's going on.

Organize before you Automate.

Create simple, visual organization that makes Lead Management a breeze. Then, once the organization is "dialed in", automate to your heart's content.

Before I break down how we improved your Lead Management, let me give you a quick glimpse into the visual lead organization inside Freedomsoft. Every lead campaign, and your overall "global" leads pipeline can be seen visually just like this:



**The Visual Leads Dashboard Is One Of The Most Loved Lead Management Tools In Freedomsoft**

Ok, so now let's dive into 2019's Favorite Feature #3.

Lead Management is physically done in a variety of ways.

First, Lead Management is done manually, at an individual lead level. This is most often done by a Leads Manager, or an Acquisitions Team Member while working a specific lead.

Whether this is done by updating the status, pushing the lead into a follow-up campaign, or setting up an appointment or task, managing individual leads manually is part of the daily work that is done as part of an organized lead management effort.

But not all lead management is done manually, and one lead at a time. Often your lead management needs to be done “in bulk” by selecting a group of leads at once, and applying a certain action to the group as a whole.

By selecting the leads in bulk, each lead gets individually updated when manually applying the action to the group.

And finally, once your leads are organized, your lead management can become automated. Ah, yes, the beautiful automation word. Organized automation is AWESOME.

Freedomsoft's Workflow Automation (you'll see more below) is set-up to trigger certain actions by simply updating a lead's status. Whether moving leads into groups, from Campaigns to Workspaces, or starting/stopping Follow-up Actions - using Freedomsoft's Workflow Automations, automates your lead management.

The reason I'm highlighting this for 2019, is we recognized that every action that helps you manage your leads better, depending on the situation, needs to be done either...

...(1) manually one lead at a time, (2) in bulk across groups of leads with a single click, or (3) automated and virtually unseen.

So, we spent 2019 making sure every action that helps you manage your leads better, make more offers, and turn leads into profit, can be done in all 3 ways. Dig in. You'll love it.

The screenshot displays the Freedomsoft Leads Dashboard. At the top, there's a navigation bar with tabs: Marketing, Leads (selected), Properties, Rehabs GPS, Buyers, Contacts, Reports, and Learn. Below this, a breadcrumb trail reads: Leads Dashboard > My Campaigns > DEMO: Lakewood Vacants 3/28/19 > All Leads. A toolbar contains buttons: New Lead, Archive, Delete Multiple, Mark As Read, Move To, Copy To, Distribute To, Remove From, and More. A search bar is on the right. The main table lists leads with columns: Control Number, Address, City, Zip, Owner Of Record, and Primary Contact Phone. A red arrow points from the 'More' button in the toolbar to the 'Update Status' option in the dropdown menu. The table shows several leads, including one in 'Inbox' and others in 'Trash' and 'Groups'.

Control Number	Address	City	Zip	Owner Of Record	Primary Contact Phone
1002 Indian Hills Court	Venice	34293	Charlotte, Cinciguerra Trust	(720) 730-9020	
12520 EDGEWATER DR APT 203	LAKEWOOD	44107	Susan M Olson	(440) 808-8486	
12900 LAKE AVE PH 7	LAKEWOOD	44107	Herbert W Riemenschneider	(614) 442-3000	
12500 EDGEWATER DR APT 701	LAKEWOOD	44107	Linda L Williams	(614) 442-3000	
12520 EDGEWATER DR APT 409	LAKEWOOD	44107	Amy Balliett	(614) 442-3000	
2103 ELBUR AVE	LAKEWOOD	44107	Kevin Oboyle	(614) 442-3000	
1314 MATHEWS AVE	LAKEWOOD	44107	Sandy Banks Lic	(614) 442-3000	

**Easily Manage Your Leads In Bulk And Update Status To Trigger Automated Actions**

## 2019 Favorite Feature #3

# Powerful Workflow Automation & My Personal Lead Management Set-up

I love this one because the overall design of the Freedomsoft's Lead Management system forces you to be more organized. As a result, Workflow Automation becomes magical.

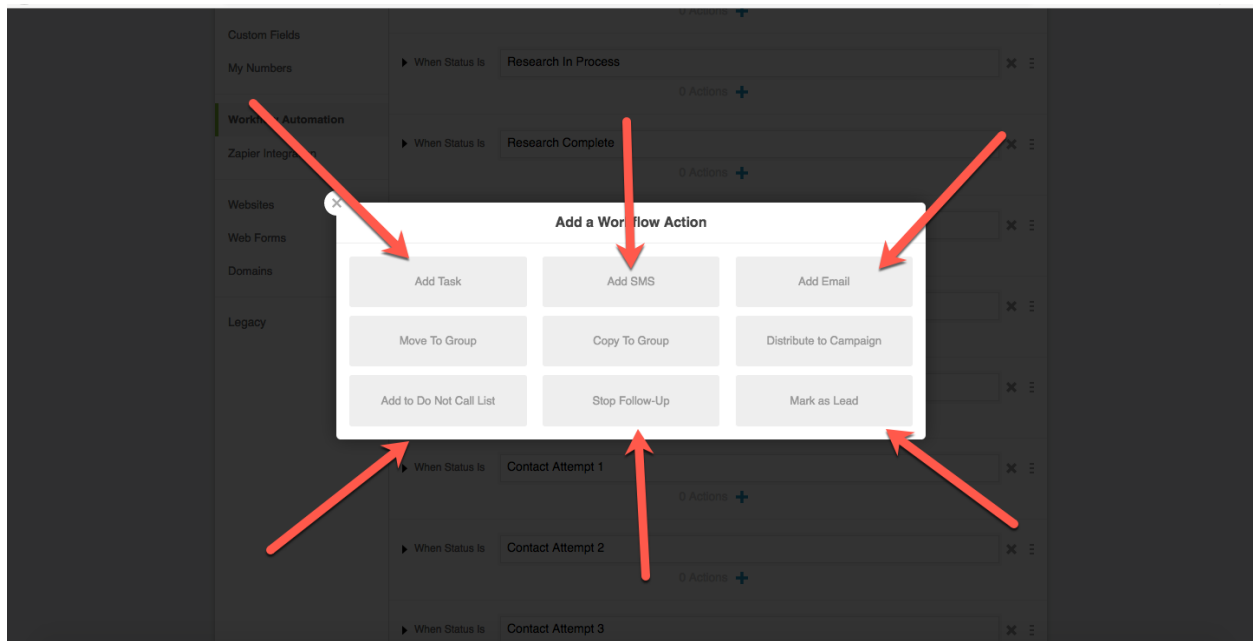
As I often say, simplicity, organization, and automation are the keys to running your business smoothly and efficiently, and Freedomsoft's Workflow Automation helps you do this beautifully.

Workflow Automation is designed around Freedomsoft's Lead Central concept which puts your Lead Campaigns at the center of your Lead Management system, like the hub of a wheel.

Everything gets driven by managing to Status.

Updating a Leads Status can instantly trigger a series of actions. Remember, the fortune is in the follow-up, so never underestimate the power of an organized, and visual leads dashboard.

Because you can always visually see your leads pipeline on Freedomsoft's Visual Leads Dashboard, (see image in Feature #4 above), applying an updated Status to any lead that can instantly trigger automation, becomes intuitive.



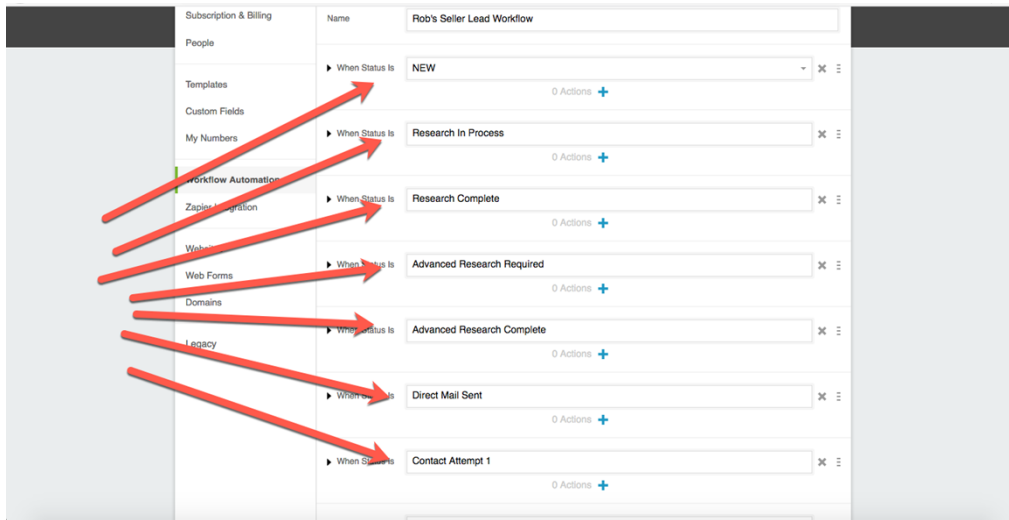
**These Workflow Actions Create Powerful Automations To Help You Close More Deals**

It's so simple

And, here's the best part. If you don't want to try and build any of this yourself...you're in luck because, as part of our effort to help you turn more leads into profit, we've added my personal Workflow Automation set-up.

If you're already a Freedomsoft User, it's in Settings > Workflow Automation. If you're just signing up today, it's waiting for you right now.

It comes complete with all my Lead Statuses and Automated Actions.



**Build Powerful, Fully Customized Automated Actions For Every Lead Status**

## 2019 Favorite Feature #2

# Single Lead & Bulk Lead Skip Tracing

One of my favorite, and obviously one of our User's favorite feature additions in 2019 was the addition of the built-in, point-n-click skip tracing tool we call FreedomSkip.

FreedomSkip has been a huge value add for Users running cold call campaigns, getting leads from bird-dog campaigns, and digging deeper during lead follow-up to uncover opportunities that most real estate investors completely miss.

Using Freedomsoft's Lead Finder (more on this soon), it's as easy as 1-2-3 to build marketing lists of dozens, 100's, and even thousands of leads. We built FreedomSkip for ultimate flexibility with no minimums so you can skip trace a single lead, or thousands at a time. It's up to you.

With a single click, FreedomSkip runs a comprehensive skip trace on any lead in your system returning phone numbers and email addresses in seconds.

It's never been so fast and simple to get the contact information you need. FreedomSkip eliminates importing or exporting, keeping your data safer, and preventing human errors that often occur when moving leads between systems.

It's so simple to use. Simply select the leads you want to skip trace, hover over the More button, and click Skip Trace Leads. FreedomSkip takes care of the rest.

The screenshot shows the Freedomsoft Leads Dashboard. On the left, there's a sidebar with navigation options like 'New Lead', 'Import Leads', 'Inbox (196)', 'Archived Leads', 'Subscribed Leads', 'Unsubscribed Leads', 'Confirmed Leads (227)', 'Unconfirmed Leads (9)', 'All Leads (236)', 'Trash', and 'Groups'. The main area displays a table of leads with columns: Control Number, Address, City, Zip, Owner Of Record, Primary Contact Phone, Mailing State, and Last. A dropdown menu is open over the table, showing options like 'Mark As Unread', 'Color Code', 'Confirm Leads', 'Stop Follow-Up', 'Update Status', 'Mark as Lead', 'Add To Whiteboard', 'Print Leadsheets', 'Outsource Leads', 'Skip Trace Leads', 'Export to Direct Mail', and 'Export'. Red arrows point to the 'Inbox' section and the first four rows of the lead table. A red arrow also points to the 'Skip Trace Leads' option in the dropdown menu.

# 2019 Favorite Feature #1

## Lead Finder, Freedomsoft's Searchable Leads Database w/ Over 108 Million Properties Nationwide

Freedomsoft gets you leads. Period. End of story.

We love not only providing a software system that is designed to convert more leads into profit, but also to be at the forefront of getting you the leads to convert.

Freedomsoft's LEAD FINDER is a lead getting tool inside Freedomsoft that allows you to search and pull leads nationwide...INCLUDED AT NO COST.

You can apply filters and flags to instantly pull leads like:

- > Absentee Owned
- > Vacant Houses
- > Tax Delinquent Leads
- > Owner Occupied
- > Length of Ownership
- > High Equity Houses
- > Low Equity Property
- > Free & Clear Deals
- > Corporate Owned
- > Trust Owned

- > Bank Owned /REO
- > Last Sale Price
- > Last Sale Date
- > Bedrooms
- > Bathrooms
- > Square Footage
- > Lot Size
- > And more...

...all with a click.

Build fully customized lead lists, and drop them right onto a Freedomsoft lead campaign, to instantly start marketing.

Lead Finder is automatically integrated with the Freedomsoft Find The Owner tool, so when the leads hit your campaign, the Owners names, mailing addresses, and property details are all right on your dashboard.

And best of all, the simple search screen makes adding filters, flags, and customizing your marketing leads lists fast and easy.

The screenshot shows the 'Lead Finder Search' window in the Freedomsoft application. Red arrows point to the following sections:

- GEOGRAPHY:** Missouri (dropdown), City or Zip Code(s) (text input), OR (radio button), Saint Louis (dropdown).
- OWNERSHIP TYPE:** Individual Owned (Include, Exclude, No Preference), Corporate Owned (Include, Exclude, No Preference).
- PROPERTY TYPE:** Search All (1 - 4 units), Single Family Residential (checked), Duplex, Triplex, Quadplex, Condo/Townhome.
- PROPERTY FILTERS:** Bedrooms (3), Bathrooms (2), Year Built (Min - Max), Square Feet (1,000 sqft), Lot Size (Min - Max), Stories (1-Story, 2-Story, Any).
- PROPERTY STATUS:** Ownership Status (Owner Occupied, Absentee Owner, No Preference), Out-of-State Owner (Only, Exclude, No Preference), Vacant (Yes, Exclude, No Preference), Tax Delinquent (Yes, Exclude, No Preference), Foreclosure Auction (Yes, Exclude, No Preference), Quit Claim/Deed Transfer (Yes, Exclude, No Preference).

Instantly Build Highly Customized Marketing Lists Using Freedomsoft's Lead Finder

## 2019 Favorite Feature

**\* HONORABLE MENTION \***

## Advanced User Permissions

It's super fun to see how different FreedomSoft Users set up and manage their accounts and teams. Some Owners give everyone full access to everything, others restrict permissions to most areas of the software.

There isn't a right or wrong way to do it, it's really whatever helps you and your team function with maximum efficiency, while managing the risks that come with access.

One of the things we spent a lot of time working on in 2019 were User Permissions. As more and more teams use the software, User Permissions became a bigger and bigger point of discussion amongst Users, and among my internal team.

**Invite New User**

Name:  First  Last

Email Address:

Permissions: **Has limited account access**

<input checked="" type="checkbox"/> Lead Finder	<input checked="" type="checkbox"/> Cash Buyers	<input checked="" type="checkbox"/> Private Lenders
<input checked="" type="checkbox"/> Offerbot	<input checked="" type="checkbox"/> Direct Mail	<input checked="" type="checkbox"/> Email Broadcasts
<input checked="" type="checkbox"/> SMS Broadcast/Dialer	<input checked="" type="checkbox"/> Lead Swiper	<input checked="" type="checkbox"/> Leads
<input checked="" type="checkbox"/> Properties	<input checked="" type="checkbox"/> Rehabbers GPS	<input checked="" type="checkbox"/> Buyers
<input checked="" type="checkbox"/> Contacts	<input checked="" type="checkbox"/> Community	<input checked="" type="checkbox"/> Classroom
<input type="checkbox"/> Websites / Webforms	<input checked="" type="checkbox"/> Exports	<input checked="" type="checkbox"/> Reports

Campaigns: **No Campaigns**

SMS Broadcast/Dialer: ☒ Show broadcasts related to all Lead Campaigns ☐ Limit based on Lead Campaign permissions

Include a personalized message (optional):

**Send Invitation**

#### **Inviting A New User To Your Account Allows You To Immediately Set User Permissions**

As you can see, User Permissions are quite flexible. You can grant access or restrict access to just about anything.

Here's how we tackled User Permissions.

At the top line of User Permissions, we wanted to grant or restrict access to complete areas inside the application, such as to various marketing and data tools, the leads module and lead campaigns, the properties dashboard, the buyers list, etc.

The initial question to be asked when granting User Permissions is simple, what areas of the application do I want this person to have access to?

A unique, but not overlooked User Permission limitation, is the restriction of exporting. You can grant someone permission to an area of the application, lets say your Buyers List, but by restricting exports, that person would not be able to select all leads and export that list.

The next level of User Permissions, what I think of as the working permissions are based primarily around Lead Campaigns and Properties.

Every Lead Campaign can be customized with its own set of User Permissions by simply selecting who can see each Campaign. You'll notice in the image above, that when you first invite someone into your Account, you can manage their campaign permissions there too.

The screenshot displays the FreedomSoft interface. The top navigation bar includes 'Marketing', 'Leads', 'Properties', 'Rehabbers GPS', 'Buyers', 'Contacts', 'Reports', and 'Learn'. The 'Leads' section is active, showing a dashboard for 'DEMO: Lakewood Vacants 3/28/19'. The dashboard includes a pie chart for 'Campaign Leads and Records by Status' and a table of lead counts. A red arrow points from the 'Campaign Permissions' link in the left sidebar to a detailed view of the permissions on the right. This view shows a list of permissions with 'Campaign Permissions' selected. Below this, a dropdown menu shows '2 Selected' users: Rob Swanson and Samantha Swanson, both of whom have their checkboxes checked under the 'Available to everyone' option.

Status	Count
Contact Attempt 1	42
DEAD	40
Warm Follow-up	40
NEW	29
Cold Follow-up	25
Contact Attempt 2	25
DO NOT CALL	21
Property Inspection	5
UNDER CONTRACT	4
Active Lead	3
Contract Sent	2

Permission	Available to everyone	Rob Swanson	Samantha Swanson
Associated Number	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Email To This Campaign	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Workflow Automation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Web Forms	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Share	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Campaign Permissions	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

**Simple User Permission Control**

This allows you to grant someone access to the Leads module, but then grant or limit their access to individual Lead Campaigns.

Likewise, granting access to the Properties and Buyers modules, allows those Users to access the Properties and Buyers Dashboards, but then, access to each property, and each buyer on the dashboard can be individually managed.

# 2019 Top 10 Summary

Well, there you have it, my personal list of the Top 10 favorite development updates to Freedomsoft in 2019.

If you're a current Freedomsoft user, hopefully you're taking full advantage of each and every one of these as they are sure to simplify your business and ultimately help you close more deals.

If you're not, please reach out to my support team today so we can help you take full advantage of everything Freedomsoft has to offer. You can reach them directly by email at: [support@freedomsoft.com](mailto:support@freedomsoft.com).

If you're not currently using Freedomsoft, take a deeper look at what the software can do for you. And remember, we've made switching to Freedomsoft very, Very, VERY simple with our Free Guide - Abandon Your Inferior CRM, Switching To Freedomsoft Made Simple.



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