rex
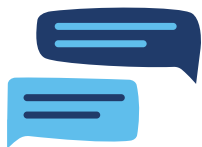
Our top Zaps

For estate agencies and property businesses

Need help or have a question?

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rex

Powerful property CRM and marketing workflow automation
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Contents

Introduction: Automate your agency with Zaps

Everyday thousands of agents across the world use Zapier to...

✓ **Send new leads a personal message**

✓ **Notify my team about new leads**

✓ **Share content across social media**

✓ **Add new leads to a spreadsheet or database (like Rex)**

✓ **Add new leads to my CRM (Rex) or support platform**

✓ **Save files and media to the cloud**

These are just a few use cases that can power your business in 2021 and boost your productivity with less time doing the manual tasks. Over 640,000 people use just one of these time saving workflows using Zapier, so it's about time you too benefited from the power of Zaps.

Send new leads a personal message
Used by 333.8k
Use workflow

Notify my team about new leads
Used by 307.2k
Use workflow

Share content across social media
Used by 647.7k
Use workflow

Add new leads to a spreadsheet or database
Used by 327.6k
Use workflow

Add new leads to my CRM or support platform
Used by 352.5k
Use workflow

Save files and media to the cloud
Used by 234.5k
Use workflow

Our top 13 Zaps

You've set yourself a goal for the year. It might be 2X growth, or it might be 10X growth. To achieve this you know you have to be able to scale – and that's where automation comes in.

Rex is a CRM and marketing workflow that powers real estate and estate agencies to list and sell more properties. We've asked our agents both in the UK and across Australia and New Zealand to share their most useful Zaps — here's the top 13:

Zap #1

Add new contacts added to Rex mailing lists to Mailchimp as subscribers

Rex + Mailchimp

Zap #2

Add new leads in Facebook Lead Ads to Rex

Facebook Lead Ads + Rex

#3

Create leads in Rex from new ones tagged as "Seller" in StreetText

StreetText + Rex

Zap #4

Create leads in Rex from new ones tagged as "Buyer" in StreetText

StreetText + Rex

Zap #5

Add new Rex leads to Textdrip and applies Drip campaigns

Rex + Textdrip

Zap #6

Send channel messages in Slack for new leads in Rex

Rex + Slack

Zap #7

Add Rex tasks for new listing created

Rex + Rex

Zap #8

Send emails for new leads created in Rex

Rex + Rex

Zap #9

Create match profiles from new leads in Rex

Rex + Rex

Zap #10

Create match profiles when attendees are checked into open home in Rex

Rex + Rex

Zap #11

Send emails when new contract statuses are changed in Rex

Rex + Rex

Zap #12

Create tracks in Rex from new open home attendees added

Rex + Rex

Zap #13

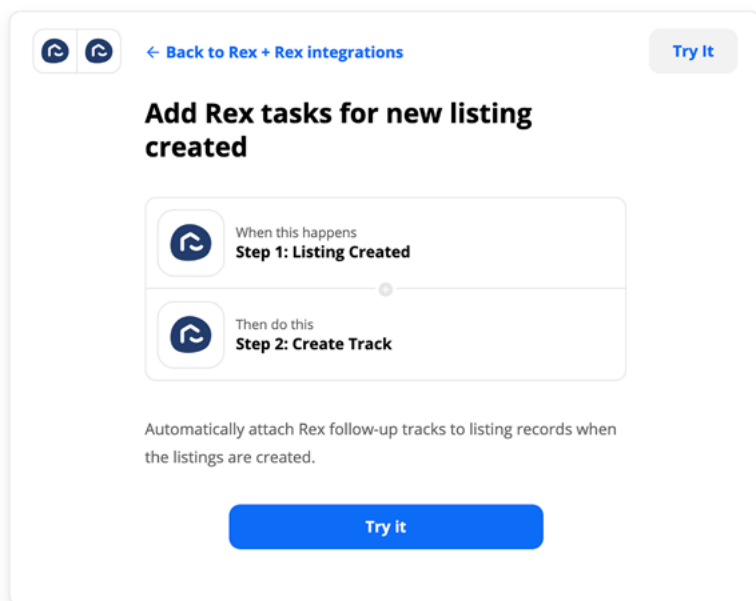### Send text messages for new listings published in Rex

Rex + Rex

The Zap basics

If you are new to Zapier and not sure what all the talk of Zaps is really about we've broken down the basics.

Zapier is the world leader in online automation. They handle the busywork by connecting your apps and services together and running tasks constantly behind the scenes so you don't have to. You can automate repetitive tasks without coding or relying on developers to build an integration. The Zapier app uses a really simple interface so you can point, click, and automate from idea to workflow in minutes, plus you can see tasks being completed while you watch.

How Zapier helps you automate

Once inside the Zapier platform, you can create the workflows called Zaps that automate your repetitive tasks that don't require personal attention.

The anatomy of a Zap

Each Zap consists of a trigger and one or more actions. When you turn your Zap on, it will run the action steps every time the trigger event happens.

Let's start with the **trigger** – which is an event that starts a Zap. For example, if you want to send a text message each time you receive an email, the trigger is 'a new email is received in your inbox'.

The Rex Zapier integration includes 20 different Rex triggers already set up and ready to use, including:

Instant

Contract Status Changed

Triggers when a Contract status changes

Instant

Listing Sold/Leased

Triggers when a Listing is marked as sold or leased

Instant

Appraisal Created

Triggers when a Appraisal is Created.

Instant

Calendar Event Created

Triggers when a Calendar Event is Created.

Instant

Calendar Events Updated

Triggers when a Calendar Events is Updated.

Instant

Contact Created

Triggers when a Contact is Created.

Instant

Contact Updated

Triggers when a Contact is Updated.

Instant

Tag Added to Contact

Triggers when a Tag is added to a Contact

Instant

Contract Created

Triggers when a Contract is Created.

Instant

Lead Created

Triggers when a Lead is received or created Open Home Attendee Added

Instant

Listing Created

Triggers when a Listing is Created.

Instant

Listing Updated

Triggers when a Listing is Updated.

Instant

Listing Published

Triggers when a Listing is published

Instant

Tag Added to Listing

Triggers when a Tag is added to a Listing

Instant

Contact Added to Mailing List

Triggers when a Contact is added to a Mailing List

Instant

Contact Removed From Mailing List

Triggers when a Contact is remove/unsubscribes from a Mailing List

Instant

Note Created

Triggers when a Note is Created.

Instant

Open Home Attendee Added

Triggers when an open home attendee is added to a Listing (as an individual feedback)

Instant

Property Updated

Triggers when a Property is Updated.

Instant

Tag Added to Property

Triggers when a Tag is added to a Property

These are all Instant triggers. With an instant trigger, your trigger app will send Zapier an instant notification whenever there's new data. Zaps with instant triggers are labelled Instant on your dashboard and in the Zap editor.

Once the trigger is selected, you can then move on to the actions. This could be one or a series of actions. How many actions you link together can be as simple or as complex as your business processes.

An action is an event a Zap performs after it is triggered. For example, if you want to send a text message each time you receive an email, the action is 'send a text message'.

> **"What we're achieving with the Zapier integration would've taken our team dozens of hours every week. It's kept everyone focused on the work that's really dollar productive."**

— Henry Hodge – Principal Henry Hodge Real Estate

The team at Rex have set up 11 different Rex actions including:

Create Match Profile

Creates a Match Profile for a Contact (if one doesn't exist)

Instant

Add Tag

Adds a Tag to a Contact, Listing or Property

Instant

Create Reminder

Creates a Reminder

Instant

Remove Tag

Removes a Tag from a Contact, Listing or Property

Instant

Assign Lead

Assigns a Lead to a user

Instant

Create Track

Applies a Track to a record

Instant

Instant

Send Email

Sends an email

Instant

Send SMS

Sends an SMS

Instant

Assign Lead

Assigns a Lead to a user

Instant

Remove All Tracks

Removes all Tracks associated with a record

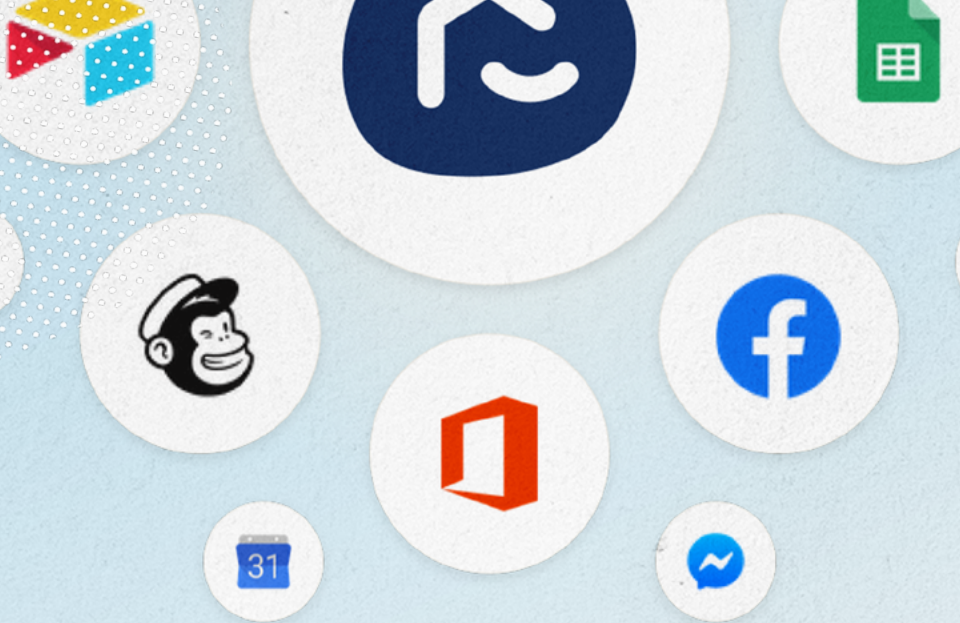Instant

Create Note

Creates a Note

Simple zaps might only have one action, but with Zapier you can link together a whole string of actions. One that will get many agencies excited is receiving a contact form submission from your website, and before you have read the rest of this resource, you could have:

✓ **Added the contact details into Rex**

✓ **Sent an email response to the contact**

✓ **Sent notification to the sales team via Slack or Messenger**

✓ **And Set a followup task in Rex**

Want to see how Rex could automate your agency workflows and help you drive your 10X growth?

If you want to talk about how you, your agents, and your agency could benefit from Rex's powerful built-in and thrid party automation can help you grow, reach out to our team at sales@rexsoftware.com (Australia/New Zealand) or uksales@rexsoftware.co.uk (UK).

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marketing workflow automation**

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