



Trigger tags

Apply the right tag and the matching action plan kicks in and the lead's status updates automatically.

QUICK REFERENCE
V2.2 · 2026

TAG	USE WHEN	RESULT
Timeframe nurture		
All move the lead to Watch. Set a long-term nurture plan based on when the lead expects to act.		
Timeframe: 3 to 6 Months	Interested; expects to act in 3–6 months.	Assigns 3–6 mo nurture plan → ● Watch
Timeframe: 6 to 12 Months	Expects to act in 6–12 months.	Assigns 6–12 mo nurture plan → ● Watch
Timeframe: 12+ Months	Expects to act in 12+ months.	Assigns 12+ mo nurture plan → ● Watch
Timeframe: No Timeframe	Interested, but no clear window yet.	Assigns no-window nurture plan → ● Watch
Workflow triggers		
All move the lead to Qualify. Trigger an action plan based on the lead's behavior or situation.		
Ghosted	Nudging a lead who went silent after recent engagement — about 7 days.	Buyer / Seller Ghosted plan → ● Qualify
Reactivate	Re-engaging old or unresponsive leads — 30+ days since last activity.	Buyer / Seller Reactivation Campaign → ● Qualify
Has Agent	A lead says they're already working with another agent.	Has Agent plan → ● Qualify
Already Bought	A lead has already purchased.	Already Bought plan → ● Qualify

Some tags apply themselves

Behavioral activity, communication tracking, and service-managed flags are added by the system automatically. You'll see them on the contact page, but you don't manage them. If you spot a tag you don't recognize, it's probably one of those.

Tags are how you steer the system — apply the right one and the matching plan and status change take over.

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