PROPERTY SERVICES · CRM WORKFLOWS

How CirclePe Personalizes Support with Spur's Custom Fields

CirclePe turned its helpdesk into a context-rich CRM using Spur's Custom Fields, CSV import/export, and Dynamic Segments, personalizing every chat, routing faster, and powering monthly broadcasts to 10k+ home-seekers.

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CirclePe
Property services · CRM workflows

2,000+
Tickets handled every month

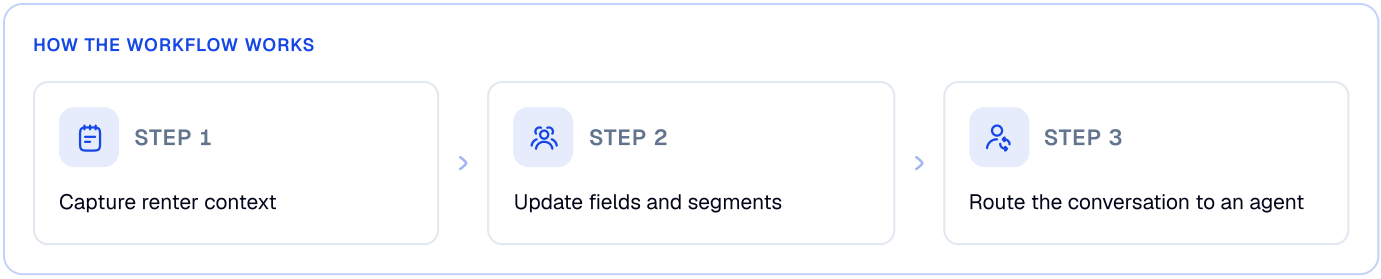
Custom fields powering routing & personalization	13
Avg first response	1 hr

KEY TAKEAWAYS

- Custom Fields = CRM superpowers in the inbox. Store the data you care about and show it where agents work.
- Automation keeps data fresh. Ask → capture → update fields → route—on autopilot.
- Segments drive ROI. Dynamic audiences turn one-size-fits-all blasts into high-intent conversations.
- CSV keeps systems in sync. Import, export, and enrich without hassles.

Ask an AI about this story ChatGPT Claude Perplexity

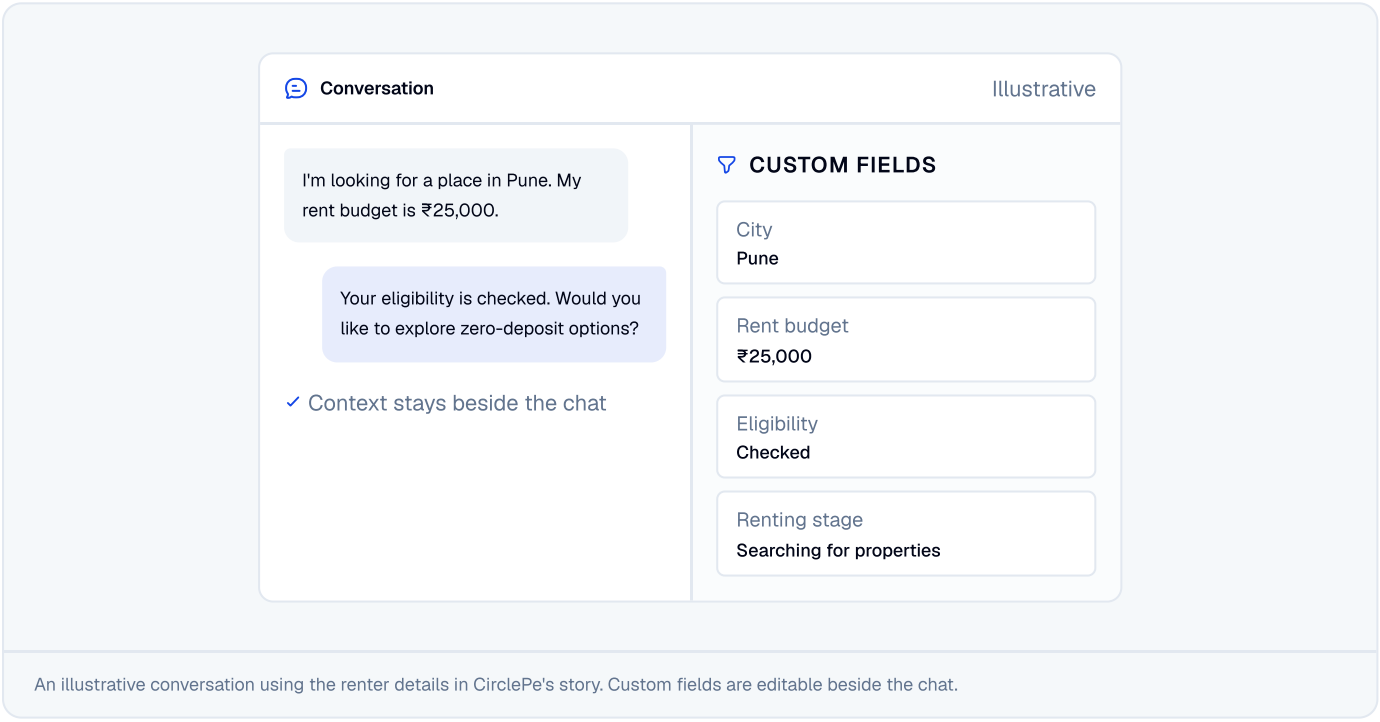
CHALLENGE	Scattered notes and manual CRM updates made renter context difficult to carry between conversations.
SOLUTION	Use editable custom fields, dynamic segments and flows that update fields and assign the right agent.
RESULTS	✓ 13 custom fields in the workflow ✓ Monthly broadcasts to 10,000+ customers



Before Spur

- Agents juggled spreadsheets and scattered notes to recall a renter's **city, budget, eligibility, and stage**.
- Broadcasts went broad, not **segment-smart**.
- Updating CRM data during chats was manual and error-prone.

The Spur Solution

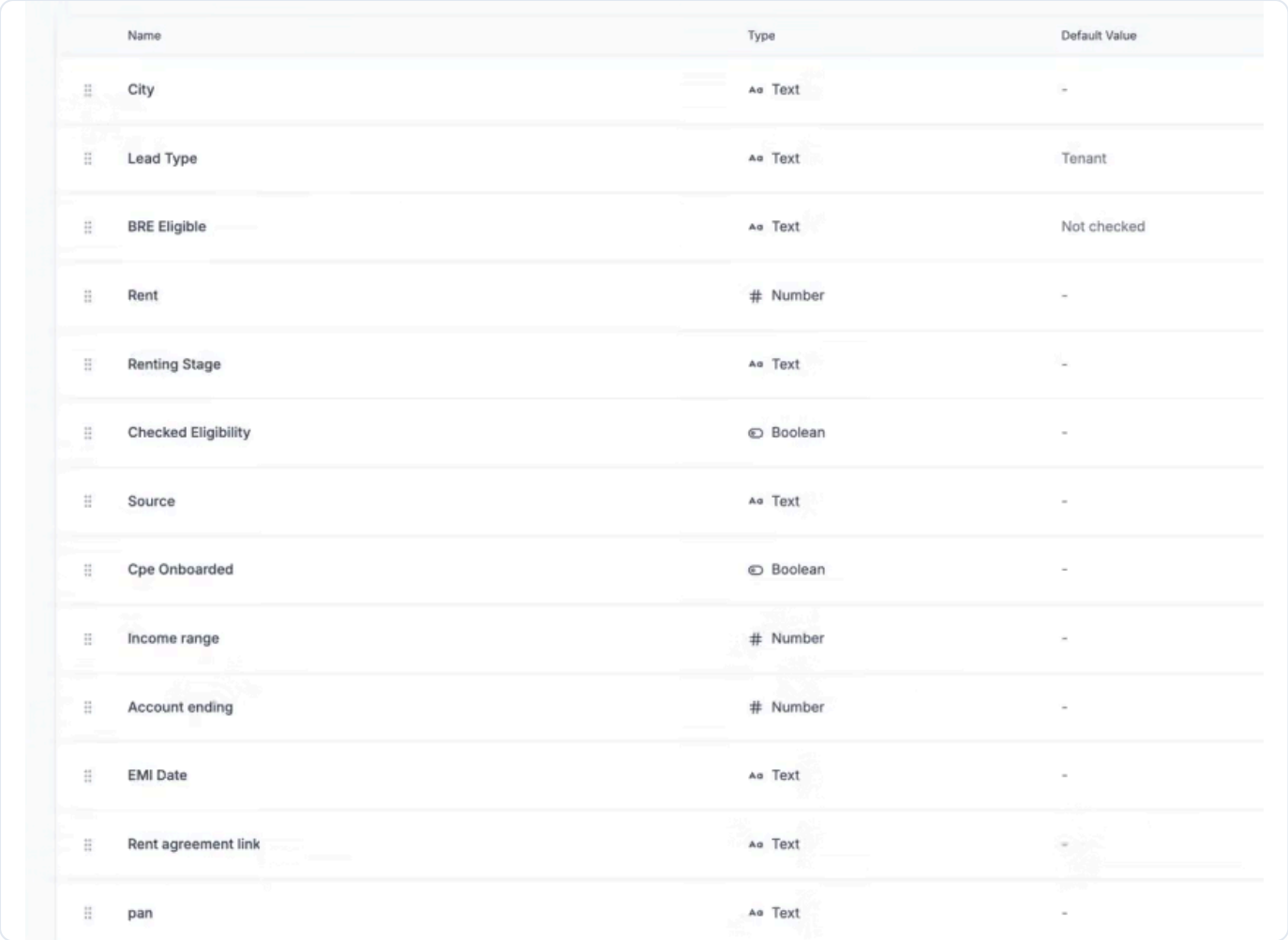


An illustrative conversation using the renter details in CirclePe's story. Custom fields are editable beside the chat.

Custom Fields for Live Context (the star of the show)

Spur's **Custom Fields** live directly in the inbox sidebar right beside every conversation so agents never leave the chat to see crucial details. Fields are editable on the spot or updated automatically by flows.

CirclePe's Custom Fields (13):



Name	Type	Default Value
City	Text	-
Lead Type	Text	Tenant
BRE Eligible	Text	Not checked
Rent	Number	-
Renting Stage	Text	-
Checked Eligibility	Boolean	-
Source	Text	-
Cpe Onboarded	Boolean	-
Income range	Number	-
Account ending	Number	-
EMI Date	Text	-
Rent agreement link	Text	-
pan	Text	-

circlepe custom fields

Bulk Import / Export Contacts via CSV

CirclePe bulk-loaded legacy prospects and keeps lists fresh with **CSV import/export,** great for migrating from other tools, enriching data offline, or handing clean lists to finance and field ops.

Dynamic Customer Segments

With Custom Fields as the source of truth, **Dynamic Segments** update themselves. Anyone whose **Renting Stage = "Searching for properties"** drops into a live segment automatically; change a field and their segment membership follows.

SPUR

Let changing fields move the workflow forward.

Build segments and routing rules around the customer information your team already uses.

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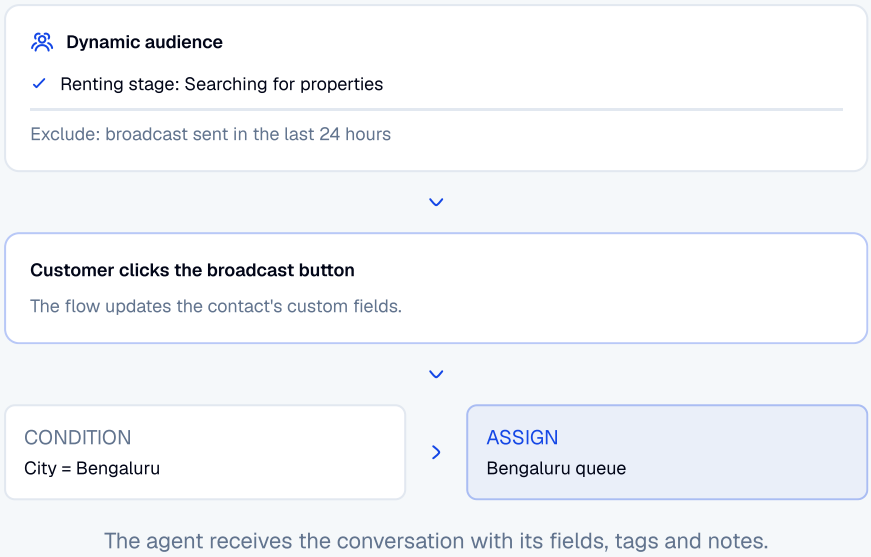
How Their Automation & Broadcast Flow Works

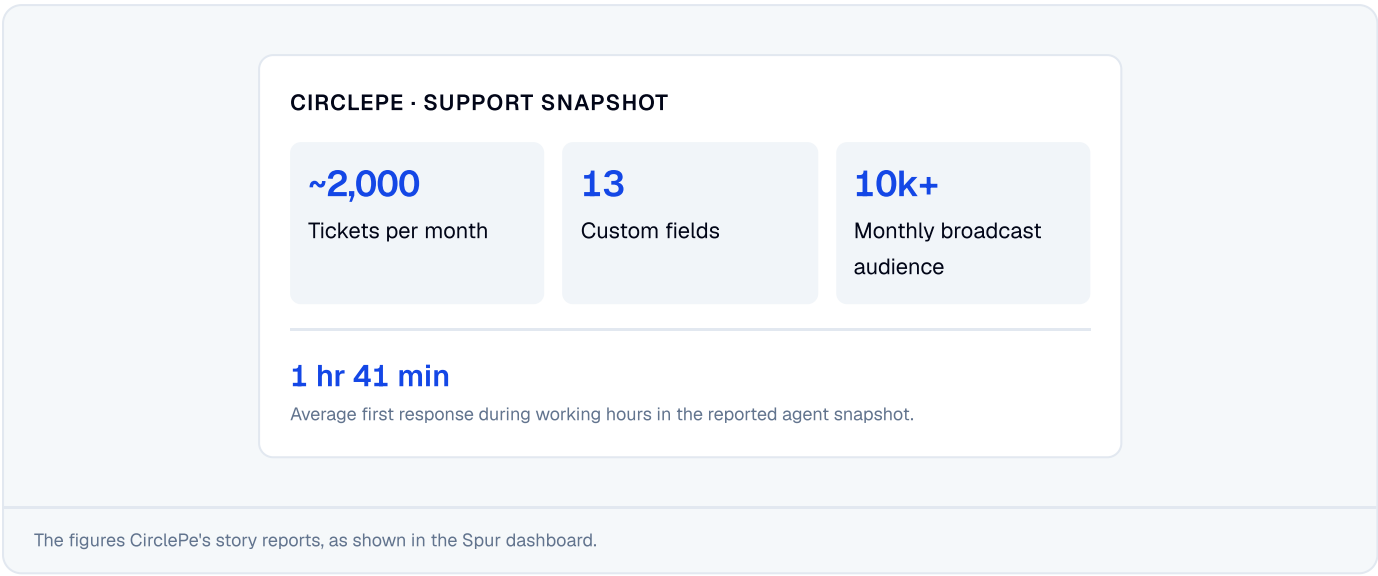


CirclePe's broadcast-to-assignment workflow, with its audience exclusion and example city-routing rule.

1. **Monthly broadcast to 10k+ customers**
   Example broadcast with this message template -
   Sent to **Segment** - “Searching for properties”.
   Excluded segment: “Broadcast sent in last 24 hours” (no spam, no overlaps).
2. Broadcast's button triggers a flow that **updates Custom Fields** on that contact in real time.
3. Based on fields, a **Condition block** routes the chat (e.g., City = “Bengaluru” ⍰ Bengaluru queue; Eligibility = “Checked” ⍰ priority lane).
4. Conversation is **auto-assigned to the right agent** with all context visible (tags, custom fields, notes) in the right-hand panel.

> “Spur’s custom fields give our agents live context (city, rent, eligibility, stage) right in the inbox, so chats feel personal and conversions are up.”
>
> **Neeraj Kuriakose**, Growth, CirclePe

Analytics Snapshot (Last Week)



The figures CirclePe's story reports, as shown in the Spur dashboard.

Agent: *Sumit Ravindran,* **77** currently assigned

- **163** tickets resolved | **238** total involvements
- **Resolution times:** Min ~1 min · Max **226 hr 19 min** (96 hr working hrs) · **Avg 21 hr 18 min** (working hrs **7 hr 38 min**)
- **First response times:** Min ~1 min · Max **23 hr 5 min** (7 hr 43 min working hrs) · **Avg 10 hr 52 min** (working hrs **1 hr 41 min**)

Takeaway: With live context and segmented routing, agents keep pace with **~2,000 tickets/month** while maintaining sub-2-hour first responses during working hours.

What Changed

- **Every chat is personal:** Agents greet with specifics—“Saw you’re in **Pune** with a **₹25k** rent budget; eligibility already checked—want to tour zero-deposit options?”
- **Cleaner ops:** No double entry. Flows write to Custom Fields; CSV keeps lists aligned across teams.
- **Smarter marketing:** Segments self-update; broadcasts reach only the right renters, with sensible exclusions.
- **Faster routing:** Condition blocks use fields to triage by city, stage, or eligibility and assign instantly.

Ready to replicate this?

Results at a glance

Tickets handled every month	**2,000+**
Custom fields powering routing & personalization	**13**
Avg first response	**1 hr**

Ready to give every agent live context, route by the right signals, and keep first responses under two hours during working hours? Create your Spur Account **today** and follow this guide to set up Custom Fields, Dynamic Segments, and the broadcast-to-assignment flow.

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