

JAN 2021 V.1



REC Portal & Updates (REALTOR)

Real Estate Connection is a licensed Real Estate Broker registered
in the State of Maryland #656001
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www.RealConectUSA.com

You can easily find your Leads and Deals Pipeline on the left hand side.

Leads	Anyone who has yet to have a credit decision.
Deals	A lead who has converted to an active deal, this could include looking at homes, under contract, or any qualified prospect. Deals also include any buyer who is still attempting to be qualified, so anyone on hold for credit repair or for any similar reason.

Leads Pipeline

Active Pipeline (18) Under Contract (1) Deal Received (1) Lead Received (2)

REC Lead Performance

Stages	No. of Leads	Percentage
New Lead	18	58%
Called	7	23%

REC Deal Performance

Stages	No. of Deals	Percentage
On HOLD	1	100%

Deals Pipeline consists of any lead that has a credit decision, for instance pre-qualified, looking at homes or under contract. Will also consist of any deal on hold for credit repair or any other reason.

Most Recent Pipeline Updates

REC Number	Buyer Name	State	Amount	Stage	Sub Stage	Follow-up Date	Lender Name	Action
REC3152	Test QA		\$10	On HOLD	Timeframe 90 Days or More	01/05/2021 01:23 AM	TO BE DETERMINED	Update File

Measuring results is the backbone of the REC Direct Program and updates on active files is required.

REC Stages	Definition
New Lead	New lead default stage
Called	A Lead that has had at least one call and is being actively worked and followed up on.
Made Contact	Some contact or exchange has been made either by voice, text or email.
Meeting or Working with Client	When a Realtor is scheduled to meet with the buyer or show them a property.
Sent to Lender	A lead sent back to the Lender for a pre-approval. Either for initial pre-approval or to give the Lender a chance to win a client who has already been qualified elsewhere.
Lost – Dead	Bad Lead information, has already purchased a home or has requested no further contact

Tags can be used to quickly add extra information on a client record. Substage TAGS include:

Spoke with Buyer / Left Voicemail / Scheduled Appointment / Email Exchange / Texting | Not in a Rush | Bad phone number | Bad Email | Do Not Contact

REAL ESTATE CONNECTION CLIENT PORTAL

Refer REC Deal | Welcome: Dan Love

Dashboard

Pipeline

- REC Managed Leads (30)
- REC Managed Deals (1)

Reporting / Analytics

- Scorecard
- REC Performance Deal Dashboard
- Rec Deals by Loan Officer/Real Estate Agent
- HOT Leads Dashboard
- ACTIONABLE

Resource CENTER

- View FAQ
- Create Ticket
- Check Status

REC Managed Leads

Leads by Stage

New Lead (0) | Called (0) | Made Contact (0) | Meeting or Working with Client (0) | Sent to Lender (0) | Lost - has an agent (0) | REC Managed Deals

Show: 50 entries

Lead	Buyer	Area	Stage	Sub Stage	Created On	Lender	Action
HL282	Sergio Sanchez		Called	Opening Emails, Left Voicemail, Email Exchange	06/26/2020 15:12 PM	TO BE DETERMINED	Update File
HL257			Called	Opening Emails	06/22/2020 19:01 PM	TO BE DETERMINED	Update File
HL244	Brian DiMaggio		Called	Left Voicemail		TO BE DETERMINED	Update File
HL223	Marian Keysmith		Called	Left Voicemail	06/16/2020 20:05 PM	TO BE DETERMINED	Update File
HL183	Lisa Wix		Called	Bad Phone Number	06/08/2020 14:45 PM	TO BE DETERMINED	Update File
HL168	Diody Gibbs		Called	Left Voicemail	06/03/2020 14:01 PM	TO BE DETERMINED	Update File

NOTE: When the Loan Officer is not listed, notify REC that the buyer needs to be pre qualified and we will ensure the correct Loan Officer is notified.

Notify us via Email or within the portal, select Notify All and we will receive the update. See below for how to quickly update a file.

Update Stage Sub Stage Add Follow

Lead Name HL282

Stage: Called

Sub Stage: Favoriting Properties Online, Texting, Schedule of Appointment, Left Voicemail, Email Exchange

Follow-up Date: mm/dd/yyyy

Add Notes: Quickly add Notes

Notify All ☐

View Prior Notes

File Updated by Dan Love

Portal User: 2020-11-06T20:49:47+05:00

Modified By: Portal User 2020-11-06T20:49:47+05:00

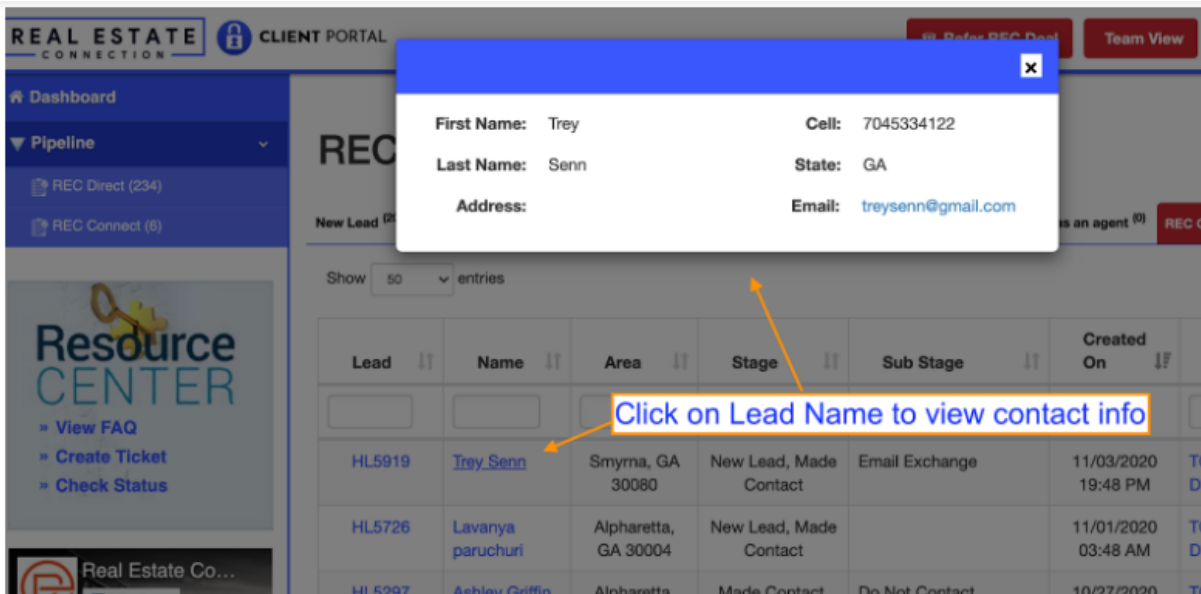
File Updated by Dan Love

Portal User: 2020-11-06T18:54:59+05:00

Modified By: Portal User 2020-11-06T18:54:59+05:00

Notify REC, the Agent or LO of the new update

Update



Sending a Proactive Update

- Any significant event or updates can be sent to Updates@RealConnectUSA.com (simply include the file number or client's name)
- Feel free to copy updates@realconnectusa.com on any Lender introduction emails and we will ensure the file is updated correctly.

Basic Service Level Agreement and Reporting

- All leads will be called within 24 hours and placed on an appropriate follow up schedule for follow up calls.
- All active leads (regardless of the lender) must be updated in REC Portal.

Active Deals REC will send an email requesting an update every 3 weeks, below you will find the active stages.

Deals Stages:

Stages	Definition
Realtor Made Contact	Some connection has been made with the buyer
Looking at Homes	Actively looking or scheduled to see homes
Under Contract	Ratified or accepted offer
Went to Settlement	Clear to Close or Went to Settlement

Sub-Stages:

REC also has sub-stages which can provide a second level of clarity for the buyers specific status, some common **Sub-Stages:** *limited at price point, buyer less responsive, currently making offers, scheduled an appointment, waiting until after the holidays etc.* These **sub-stages** allow all parties to more accurately manage, update and service our all parties. If you do not have a sub-stage that fits your situation please let us know and we would be happy to add them.