

REC PORTAL & UPDATES

(Loan Officer)



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

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

<i>REC Stages</i>	<i>Definition</i>
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

Viewing your Pipeline

Leads will be segmented at the top by stage and you can quickly view contact information or update the file from this view.

REC Managed Leads

Search by Lead #, Buyer Name : **Leads by Stage**

SEARCH

New Lead (1) Called (1) Made Contact (0) Meeting or Working with Client (0) Sent to Lender (1) Lost - has an agent (1) **REC Managed Deals**

Show 50 entries

Lead #	Buyer Name	Area	Stage	Sub Stage	Created On	Loan-Officer	Action
HL200	Lillian Olokodana violet682011@hotmail.com 201-535-6361	MD	New Lead		06/11/2020 13:41 PM	Dan Love	Update File

Click for detailed view

Quickly Update File

Important Note:

“Update File” button

You can quickly view the prior notes, add notes, notify REC and the Agent of any update, view or update the stages or add a follow up date.

Update Stage, Substage and Add Follow up

Lender Lead Name HL202

Stage: Sent to Lender

Sub Stage: Favoriting Properties Online, Spoke with Buyer

Follow-up Date: mm/dd/yyyy --:--

Buyer Home Search URL: https://example.com

Please enter Home Search URL

View Prior Notes

Add Notes

Notify All

Notify REC, the Agent or LO of the new update

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.

