REC PORTAL & UPDATES

(Loan Officer)





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.

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

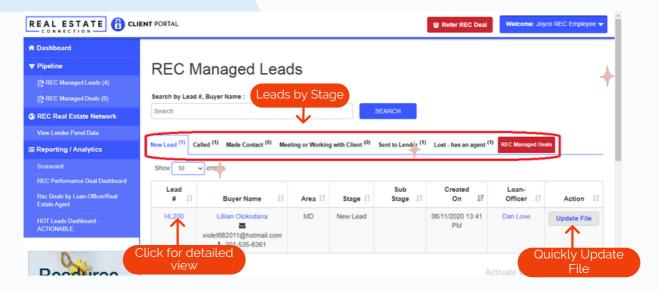
Tags can be used to quickly add extra information on a client record. Substage TAGS include:

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

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.

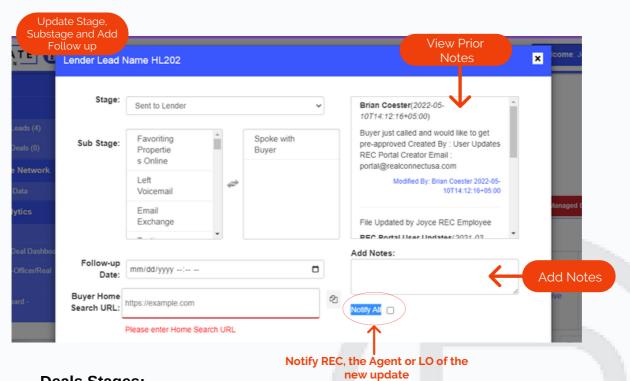




Important Note:

"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.



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.

