

JAN 2021 V.1



# 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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[www.RealConectUSA.com](http://www.RealConectUSA.com)

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

<b>Leads</b>	Anyone who has yet to have a credit decision.
<b>Deals</b>	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.

*Definition*

<b>REC Stages</b>	
<b>New Lead</b>	New lead default stage
<b>Called</b>	A Lead that has had at least one call and is being actively worked and followed up on.
<b>Made Contact</b>	Some contact or exchange has been made either by voice, text or email.
<b>Meeting or Working with Client</b>	When a Realtor is scheduled to meet with the buyer or show them a property.
<b>Sent to Lender</b>	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.
<b>Lost – Dead</b>	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.

**REAL ESTATE CONNECTION CLIENT PORTAL** | Refer REC Deal | Welcome: Dan Love

**Leads by Stage**

**REC Managed Leads**

New Lead (98) | Called (7) | Made Contact (2) | Meeting or Working with Client (0) | Sent to Lender (0) | Lost - has an agent (0) | **REC Managed Deals**

Show 50 entries | Search:

Lead	Buyer	Area	Stage	Sub Stage	Created On	Lender	Action
HL282	Sergio Sanchez		Called	Opening Emails	06/26/2020 13:12 PM	TO BE DETERMINED	Update File
HL257			Called	Opening Emails	06/22/2020 19:01	TO BE DETERMINED	Update File
HL244	Brian DiMaggio		Called	Left Voicemail	PM	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		Update File

Resource CENTER  
View FAQ  
Create Ticket  
Check Status

https://www.recusportal.com/realtor/dashboard

Viewing your Pipeline

**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**  
**Sub Stage**  
**Add Follow**

Lead Name HL282

Stage: Called

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

Follow-up Date: mm/dd/yyyy

Add Notes: Quickly add Notes

Notify All

View Prior Notes

Notify REC, the Agent or LO of the new update

File Updated by Dan Love  
Portal User 2020-11-05 20:49:47+05:00  
soc6bds  
Modified By: Portal User 2020-11-05 20:49:47+05:00

File Updated by Dan Love  
Portal User 2020-11-05 18:54:59+05:00  
test  
Modified By: Portal User 2020-11-05 18:54:59+05:00

**REAL ESTATE CONNECTION CLIENT PORTAL** | Refer REC Deal | Team View

First Name: Trey | Cell: 7045334122  
Last Name: Senn | State: GA  
Address: | Email: treysenn@gmail.com

Click on Lead Name to view contact info

Lead	Name	Area	Stage	Sub Stage	Created On	
HL5919	Trey Senn	Smyrna, GA 30080	New Lead, Made Contact	Email Exchange	11/03/2020 19:48 PM	TO BE DETERMINED
HL5726	Lavanya paruchuri	Alpharetta, GA 30004	New Lead, Made Contact		11/01/2020 03:48 AM	TO BE DETERMINED
HL5297	Ashley Griffin	Alpharetta,	Made Contact,	Do Not Contact	10/27/2020	TO BE DETERMINED

Resource CENTER  
View FAQ  
Create Ticket  
Check Status

### Deals Stages:

<b>Stages</b>	<b>Definition</b>
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.