

# REC PORTAL & UPDATES

(REALTOR)



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.

<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.

**Leads Pipeline**

Active Pipeline (0) Under Contract (0) Deal Received (0) Lead Received (4)

Stages

New Lead	1	25%
Called	1	25%
Sent to Lender	1	25%

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 decisions.

Most Recent Pipeline Updates

REC Number	Buyer Name	State	Amount	Stage	Sub Stage	Follow-up Date	Lender Name	Action
No data found.								

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

<b>REC Stages</b>	<b>Definition</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

**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 301-535-6361	MD	New Lead		06/11/2020 13:41 PM	Dan Love	Update File

Click for detailed view

Quickly 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.

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

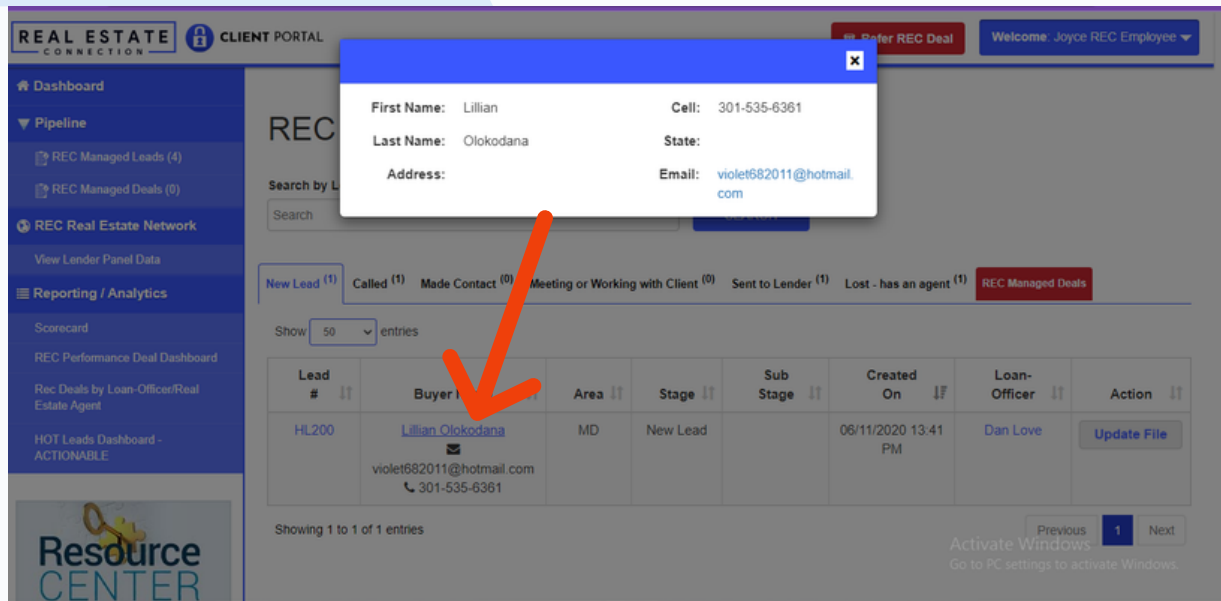
**View Prior Notes**

Brian Coester(2022-05-10T14:12:16+05:00)  
Buyer just called and would like to get pre-approved Created By : User Updates  
REC Portal Creator Email : portal@realconnectusa.com  
Modified By: Brian Coester 2022-05-10T14:12:16+05:00  
File Updated by Joyce REC Employee  
REC Portal User Updates/2021-03

**Add Notes**

Notify All

Notify REC, the Agent or LO of the new update



### Sending a Proactive Update

- Any significant event or updates can be sent to [Updates@RealConnectUSA.com](mailto:Updates@RealConnectUSA.com) (simply include the file number or client's name)
- Feel free to copy [updates@realconnectusa.com](mailto: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.