



# Welcome to Real Estate Connection

**Real Estate Connection** would like to welcome you to the Team!

**REC** utilizes an online web portal "**REC Connect**" to keep all parties involved in the buyer transactions updated on the status of the file. The REC Connect is designed to act as the system of record for the buyer from the initial lead engagement to final closing. Below you will find important links and information on how to use REC Connect and engaged with Real Estate Connection effectively.

## **With REC Connect Features:**

- View Buyer Contact Information and note History
- View REC Concierge team engagement notes
- View Lender client engagement notes
- Update File Stage and Buyer Engagement
- Add File Notes and notify all parties
- Manage files and leads in a team like fashion with all parties We look forward to serving you and your buyers!

Need Help? We are here to help you, please e-mail [support@realconnectusa.com](mailto:support@realconnectusa.com)

Thank you,

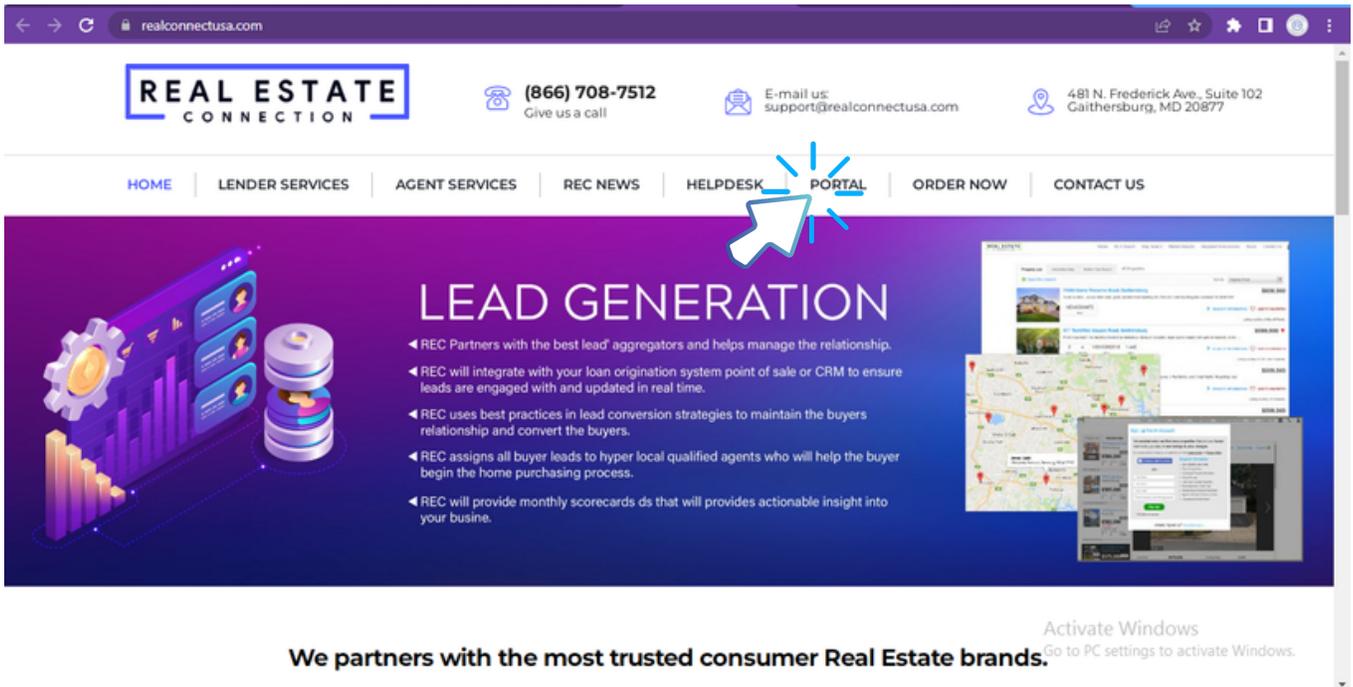
*Real Estate Connection*



# Loan Officer Partner Technology Guide

## Access the portal

Go to [www.RECUSAPortal.com](http://www.RECUSAPortal.com)



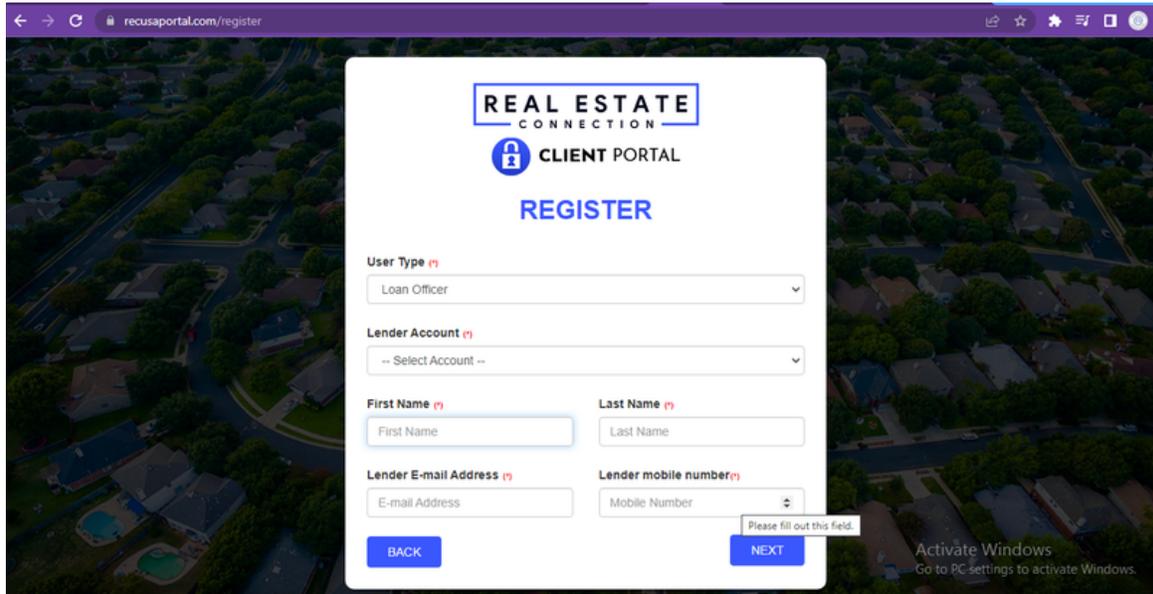
REC Website: <a href="http://www.realconnectusa.com">www.realconnectusa.com</a>	REC B2B Website
Direct URL: <a href="http://www.RECUSAPortal.com">www.RECUSAPortal.com</a>	Direct Portal Link

**\*Not the first time accessing the portal? We require you to clear your browsing history and remove cookies.**

## Creating your account with REC:

To set up your REC account you will need to fill out the following fields

Field	Description
User Typer	Loan Officer, Realtor, Buyer
First and Last Name	This is for the person registering the account
Email address	Professional Email we have for you



REAL ESTATE CONNECTION  
CLIENT PORTAL  
REGISTER

User Type

Lender Account

First Name  Last Name

Lender E-mail Address  Lender mobile number

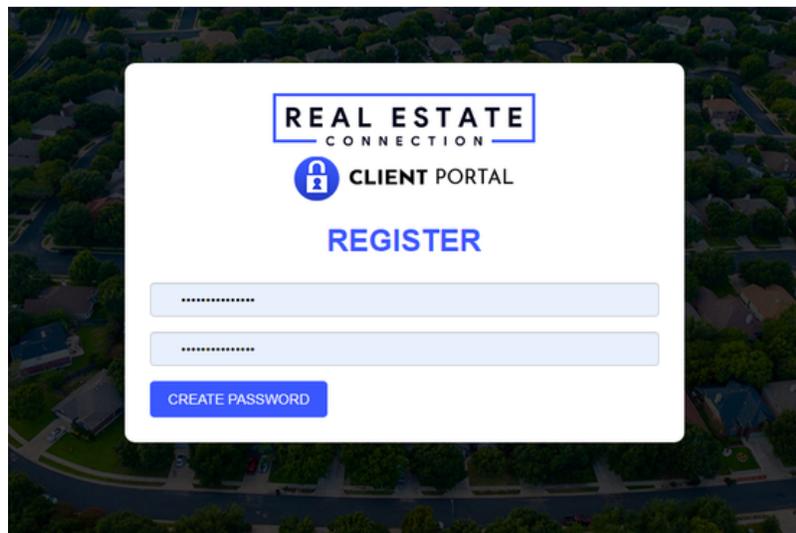
BACK NEXT

Please fill out this field.

Activate Windows  
Go to PC settings to activate Windows.

## Password Creation

You will be asked to make a strong password so that you may easily access your account. We do recommend that you use capital and small letters together with numbers and symbols.



REAL ESTATE CONNECTION  
CLIENT PORTAL  
REGISTER

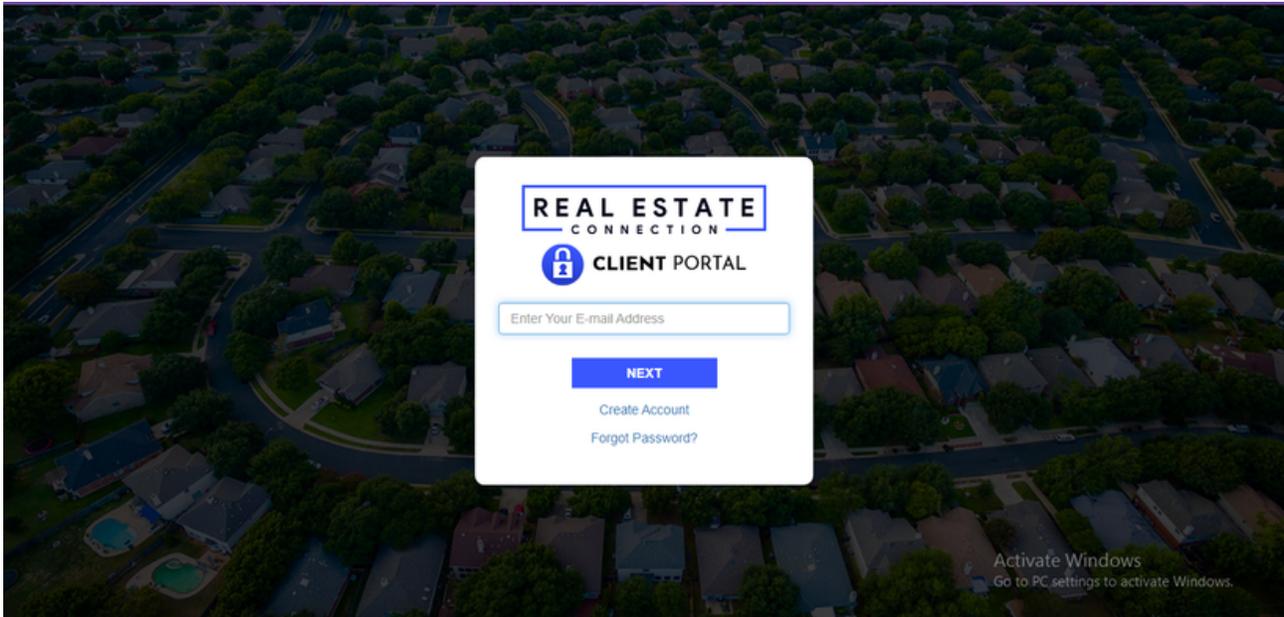
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CREATE PASSWORD

## Login on your Portal

Visit [www.RealConnectUSA.com](http://www.RealConnectUSA.com) or [www.RECUSAPortal.com](http://www.RECUSAPortal.com), Provide your email address and password so that you may access your account. Click the drop down menu to select your position and type in your password. You can click the **Remember Me** checkbox so that you do not need to type in your email and password every time you access your account.



## REC DASHBOARD

Here you will have a snapshot of your pipeline. Under Pipeline we have Segmented into 2 groups.

**REC Deals** - this pipeline contains clients or seemingly potential clients. Typically a buyer qualified by the Loan Officer or there has been some meaningful contact with the Realtor.

**REC Leads** - this is where we will find all higher funnel leads that are being worked in team like fashion in order to make contact and qualify.

**REAL ESTATE CONNECTION CLIENT PORTAL** Refer REC Deal Welcome, Joyce REC Employee

- Dashboard
- Pipeline**
  - REC Managed Leads (4)
  - REC Managed Deals (0)
- REC Real Estate Network
  - View Lender Panel Data
- Reporting / Analytics
  - Scorecard
  - REC Performance Deal Dashboard
  - Rec Deals by Loan-Officer/Real Estate Agent
  - HOT Leads Dashboard - ACTIONABLE

**Active Pipeline (0)** **Under Contract (0)** **Deal Recieved (0)** **Lead Recieved (4)**

### REC Lead Performance

Stages	No. of Leads	Percentage
New Lead	1	25%
Called	1	25%
Sent to Lender	1	25%

### REC Deal Performance

Stages	No. of Deals	Percentage
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### Most Recent Pipeline Updates

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

Activate Windows [View All](#)  
Go to PC settings to activate Windows.

## REC Deals Pipeline Stages

These Stages listed below reflect the big bucket stages during the sale process and how we manage the pipeline with our lending partners. Please ensure your buyer stage most accurately reflects the below table.

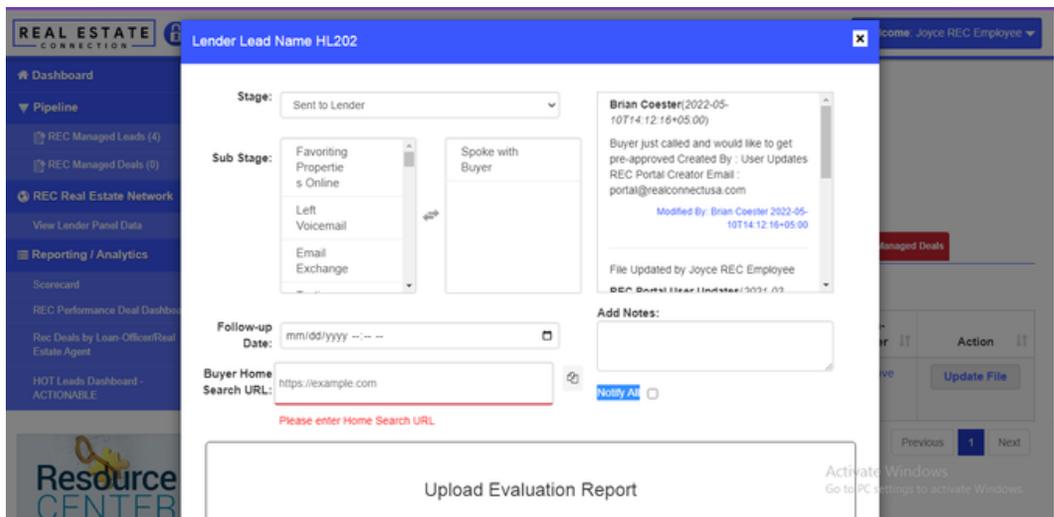
Stage	Description
<b>Realtor Made Contact</b>	Realtor has made meaningful contact with the client
<b>Looking at Homes</b>	Actively looking or scheduled to see homes
<b>Under Contract</b>	Ratified contract or accepted verbal offer
<b>Went to Settlement</b>	Clear to Close or Went to Settlement

## 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 substages 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.



You can also add a follow up date for any file that is On Hold and notify all parties of any significant changes.

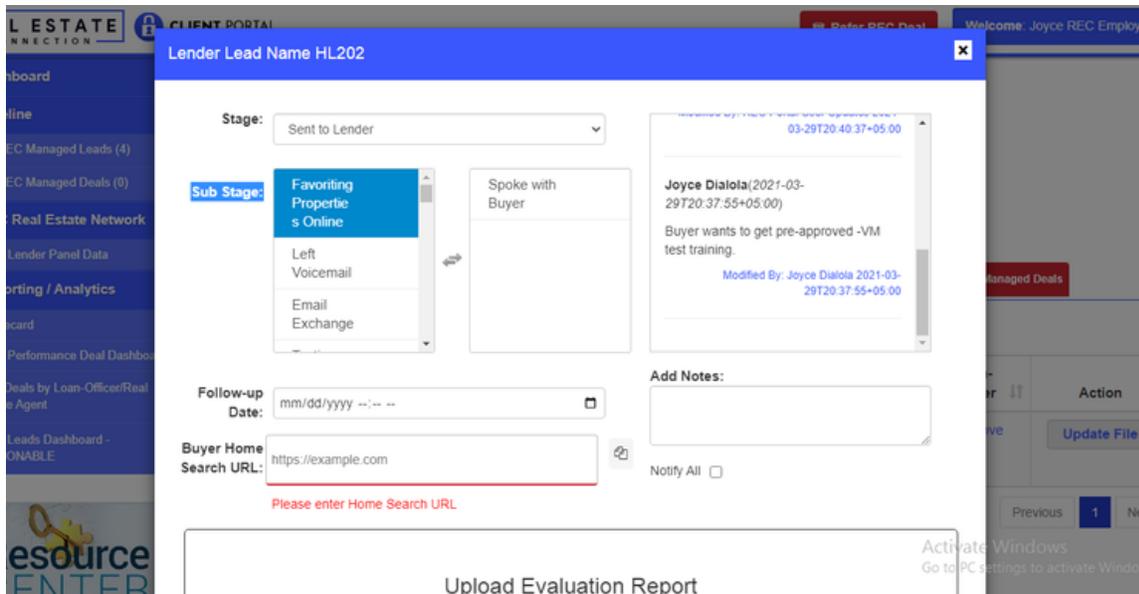
## Leads

Lead Stages are as follows:

Stage	Description
New Lead	Brand New Lead
Called	Lead has been called by Agent and REC at least once.
Made Contact	Some type of connection or exchange has been made.
Sent to Lender	Contacted the buyer and notified the LO to contact for loan application.
Converted to Deal	Lead is now a Deal and buyer very likely a client.
Lost - Dead	The lead has indicated no further contact or is a bad lead.

### Sub-Stage Tags include:

Spoke with buyer, Favoriting properties online, Left Voicemail, Email exchange, Texting, Schedule Appointment, Bad Lead (Add Notes), Bad Email, Do Not Contact, Credit Repair (Set Follow Up Date), Attempted to Contact, Sent Intro Email, Zillow Leads from Liberty Home Mortgage, Just Looking, REC 48 First Engagement, Realtor Made Contact, REC Sent to Lender, No Longer Interested, Buyer Interested, REC Made Follow-up Call and REC Called.



### Other portal information:

For other assistance in regards withy our account, feel free to contact us through [partners@realconnectusa.com](mailto:partners@realconnectusa.com). We will be more than happy to assist you.