



Weichert Lead Network

Associate Portal Guide

Updated:
May 2005

Weichert Lead Network

Introduction	3
Updating Requirements	3
Important Information:	3
Use of the Back button.....	3
Bread Crumb Trail –	3
How to Log in.....	4
How to get my Username and/or Password.....	4
How to update my Email/Cell Phone/Username.....	5
How to update my password.....	5
How to View All Broadcast Messages.....	6
How to put yourself on Vacation	6
How to Cancel a Vacation.....	6
How to update your leads	7
Buyer - Lead Status Definitions	8
Seller - Lead Status Definitions	8
How to Find Out More Information about Your Lead	9
Lead Info Tab	9
Interests Tab.....	10
Customer Info Tab.....	10
Lead Status Tab	11
Notes Tab	11
How to Add a Leads Contact info to Microsoft Outlook	12
How to Reactivate Leads	13

Introduction

This easy to use guide provides information on how to use the Weichert Lead Network Associate Portal.

Updating Requirements

You are required to update a **minimum of once a week**, between Wednesday morning at 12:01 AM and Tuesday evening at 11:59 PM.

(What does that mean for me?)

What that means is you can update any day of the week as long as it is by Tuesday.

Long term active leads are required to be updated every 4th week, between Wednesday morning at 12:01 AM and Tuesday evening at 11:59 PM.

Important Information:

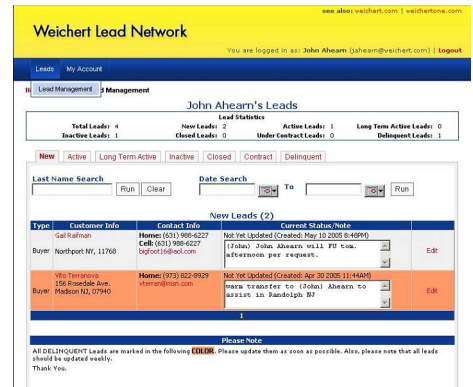
Use of the Back button – The back button always cause some issues because this is a WEB APPLICATION not a WEBSITE so you should use the functions on the screen to move around not the functions of the Browser.

Bread Crumb Trail – The bread crumb trail can be found at the top of the screen just underneath the menu. Instead on hitting the Back Button to go to the previous screen you can use the bread crumb trail.

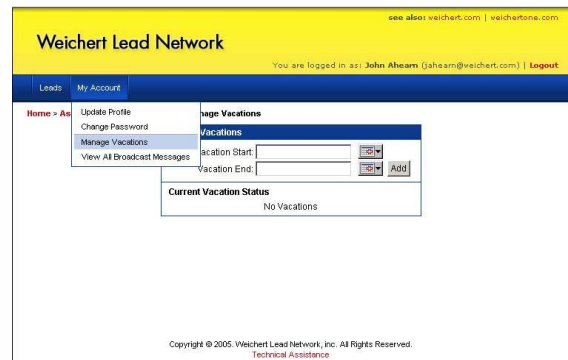
Example:

1) On Home page the user clicks on Lead on the Menu and then clicks on Lead Management (Shown Below)

2) Then the User Clicks on My Account on the Menu and then Manage Vacation



Now if the User wants to go back to the Lead Management page instead on hitting the Back Button to go to the previous screen the user can click on Associate Lead Management on the Top Navigation Bar



How to Log in

1. Open Internet Explorer (version 5.5 or higher).
2. In the address bar, enter www.weichertleadnetwork.com, the login screen is displayed.
3. Enter your Username.
4. Enter your Password.
5. Click **Login**.

see also: weichert.com | weichertone.com

Weichert Lead Network

Login

Login

Username:

Password:

Remember My Username

[Forgot Username or Password?](#)

[Trouble Logging In?](#)

Copyright © 2005, Weichert Lead Network, Inc. All Rights Reserved.
Technical Assistance

****Don't know your Username and/or Password:
Follow the steps below for how to get my Username and/or Password.****

How to get my Username and/or Password

1. Go to <http://www.weichertleadnetwork.com>
2. Click **Forgot Username and Password** link.
3. Enter in your Username or the email address you think we have on file for you.
4. Click **Submit**

At the top of the page it will tell you if it went through successfully.

see also: weichert.com | weichertone.com

Weichert Lead Network

Login

Request Your Password < Return to Login

Please enter your username or e-mail address and your login information will be e-mailed to your address on record.

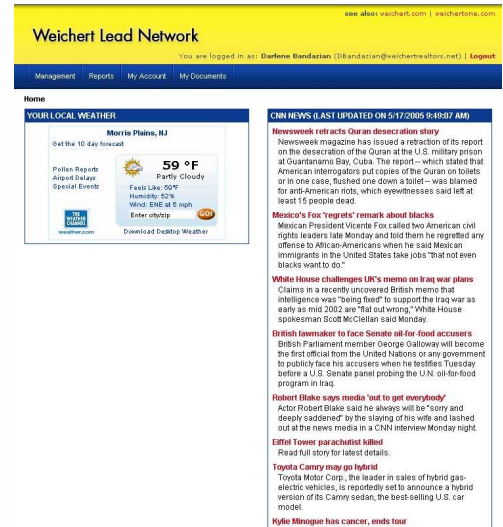
(* required)

* Username or E-mail Address:

Copyright © 2005, Weichert Lead Network, Inc. All Rights Reserved.
Technical Assistance

Home

- ❖ **Weather:** Get the local weather for the weekend while in your portal. The Weather Channel gives the weather for your area. Click on the image to get the 10 Day forecast. You can also enter the city or zip to get the weather for any specific region.
- ❖ **Messages from WLN, System Administrators, Manager, RSM, Lead Coordinator:** These are the messages broadcasted from any one of the above listed sources. Once read, click "I read it!"



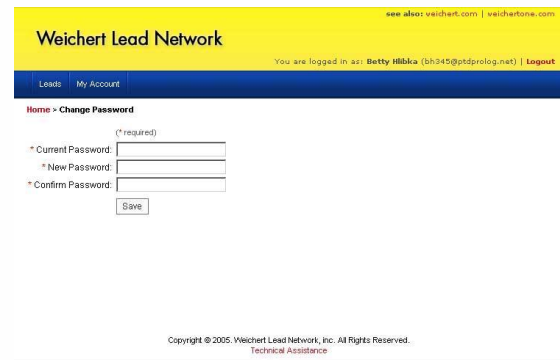
How to update my Email/Cell Phone/Username

1. Click on the **My Account**
2. Click **Update Profile**
3. Update any of the following fields: Username, cell phone, email, fax
4. Click **Save**.



How to update my password

1. Click on the **My Account**
2. Type in Current Password
3. Type in New Password
4. Type in New Password again to confirm
5. Click **Save**.



How to View All Broadcast Messages

1. Click on the **My Account**
2. Click on **View all Broadcast Messages**

To view messages that have already been read, click on the **View your archived messages** link.

see also: weichert.com | weichertone.com

Weichert Lead Network

You are logged in as: **Betty Hibka** (bh345@ptdprolog.net) | **Logout**

Leads My Account

Home > View All Broadcast Messages

View your archived messages.

MESSAGES FROM EXECUTIVE

Subject: Testing Received: 4/26/2005 12:00:00 AM Read: Not Yet Read Message: testing2	I read !!!
Subject: sdfsdfs Received: 4/26/2005 12:00:00 AM Read: Not Yet Read Message: sdfsdf	I read !!!
Subject: tsdfsd Received: 4/26/2005 12:00:00 AM Read: Not Yet Read Message: tsdfsdtsfd	I read !!!

Copyright © 2005. Weichert Lead Network, Inc. All Rights Reserved.
Technical Assistance

How to put yourself on Vacation

1. Click on **My Account**.
2. Click on the **Manage Vacations**.
3. Click on the calendar icon next to the Vacation Start.
4. A new box will pop up and you will select the start date of your vacation.
5. Once selected it will automatically fill in the date.
6. Repeat for end date.
7. Click the **ADD** button.

see also: weichert.com | weichertone.com

Weichert Lead Network

You are logged in as: **Betty Hibka** (bh345@ptdprolog.net) | **Logout**

Leads My Account

Home > Manage Vacations

Manage Vacations

Vacation Start:

Vacation End:

Current Vacation Status

	Start Date	End Date
<input type="button" value="Delete"/>	4/29/2005	4/30/2005

Copyright © 2005. Weichert Lead Network, Inc. All Rights Reserved.
Technical Assistance

How to Cancel a Vacation

1. Click on **My Account**.
2. Click on **Manage Vacations**.
3. Click on the word **Delete**.

see also: weichert.com | weichertone.com

Weichert Lead Network

You are logged in as: **Betty Hibka** (bh345@ptdprolog.net) | **Logout**

Leads My Account

Home > Manage Vacations

Manage Vacations

Vacation Start:

Vacation End:

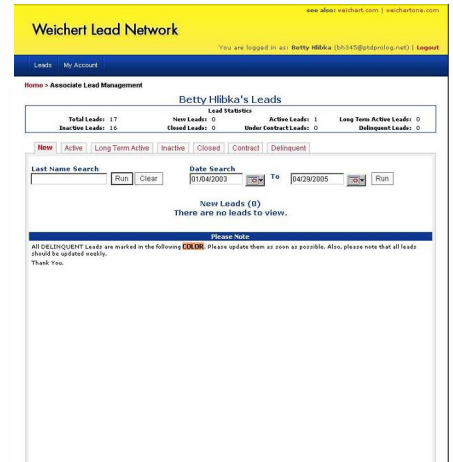
Current Vacation Status

	Start Date	End Date
<input type="button" value="Delete"/>	4/29/2005	4/30/2005

Copyright © 2005. Weichert Lead Network, Inc. All Rights Reserved.
Technical Assistance

How to update your leads

1. Click on **LEADS** link
2. Click **Lead Management**
3. Find the Lead that you would like to update by clicking on one of the following tabs.
New – New leads assigned to you, not yet updated
Active – Leads you are currently working actively.
Long Term – Leads that aren't ready just quite yet, but will get in contact with you when they are.
Contract – Leads under contract, waiting to close
Delinquent – Leads that haven't been update for more than one week.
4. Click on the word **Edit** in the last column
5. Choose a status in the Drop down menu and add a comment to the **Current Status/Note** box.
6. When you have updated that lead, click **SAVE** in the last column.
7. Repeat steps 1-6 till you have updated all your leads.



Note: If the Status of a customer hasn't changed you would need to reselect the same status and add your note.

Note: You may search for a Lead by last name, but the search is only good for the tab you are on.
 Example: If you are on the Active tab, and want to search for a lead you know is listed under the Long Term Active tab, you must first click on the Long Term Active tab, then perform your search.
This will come in most handy when you have an inactive lead that you need to reactivate.

Note: You may search for a Lead by the date you received it, but the search is only good for the tab you are on.
 Example: If you are on the Active tab, and want to search for a lead you know is listed under the Long Term Active tab, you must first click on the Long Term Active tab, then perform your search.

See next page for both Buyer and Seller definitions

Status DefinitionsBuyer - Lead Status Definitions

Anticipated offer fourth coming	Self Explanatory
Appointment set to see a listing	Self Explanatory
High interest in visited listings	Self Explanatory
Inactive – Return To Lead Network	Removes a lead that you no longer can work or is no longer considered a viable lead from your portal.
Lead Successfully Closed	When customer has gone through closing and title has passed.
Listings visited	Self Explanatory
Long Term Active	Status only available thru your manager. Use this status for leads that are considered viable, but who are many months (or possibly years) away from taking the next step to buy or sell. These leads will only need to be updated every 4th week.
Met – reviewed listing	Self Explanatory
No target properties available	Self Explanatory
Offer made / in negotiation	Self Explanatory
Under Contract	Self Explanatory – These leads will only need to be updated every 4th week.
Visiting listings as they arise	Self Explanatory
Yet to meet	Self Explanatory

Seller - Lead Status Definitions

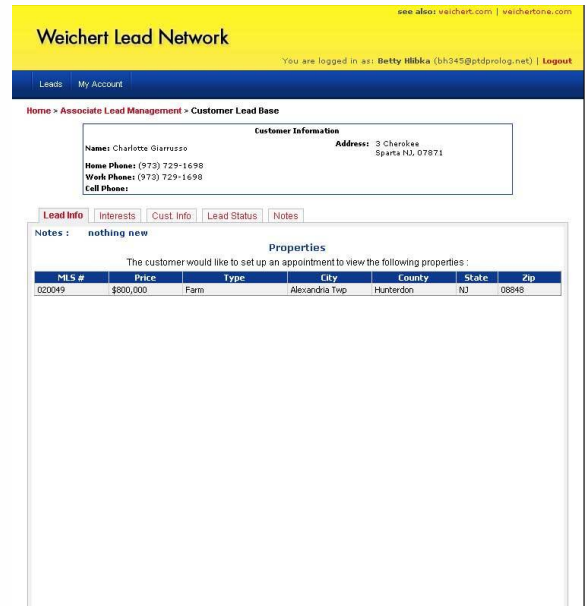
Appointment scheduled	Self Explanatory
Inactive – Return To Lead Network	Removes a lead that you no longer want to work with from your portal.
Initial presentation made	Self Explanatory
Lead Successfully Closed	When customer has gone through closing and title has passed.
Listing taken	Self Explanatory
Long Term Active	Status only available thru your manager. Use this status for leads that are considered viable, but who are many months (or possibly years) away from taking the next step to buy or sell. These leads will only need to be updated every 4th week.
Serious buyer(s)/ close to contract	Self Explanatory
Under Contract	Self Explanatory – These leads will only need to be updated every 4th week.
Yet to schedule appointment	Self Explanatory

If an agent really feels the lead is not viable, or if they're not going to work the lead effectively, we would rather have them make the lead inactive so that we at WLN can incubate the lead.

How to Find Out More Information about Your Lead

The Associate Lead Management page will give you some pertinent information to begin with such as name, address, type of customer (Buyer/Seller), phone numbers (up to 3, home, cell, and work), email address, current status, and the date that status was last entered. To get more detailed information follows the steps below

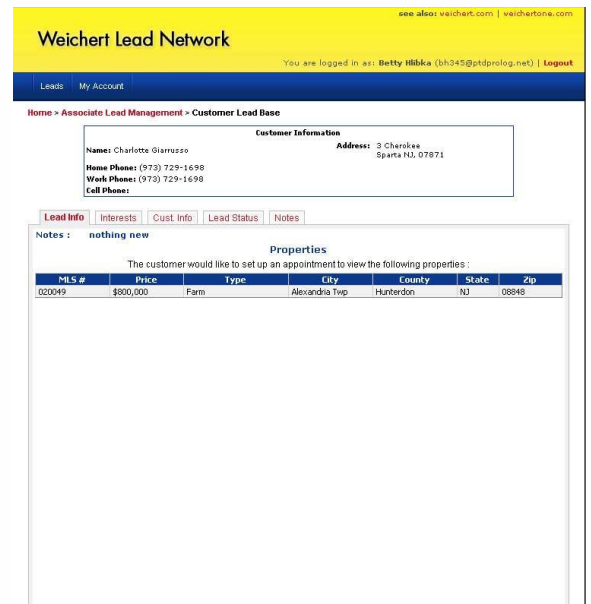
1. Click **Leads**.
2. Click **Lead Management**
3. Find the lead(s) that you would like to view more information.
4. Click on the customer's name
The following screen will be displayed:
There are several tabs available, please reference the table of contents for each use.



Lead Info Tab

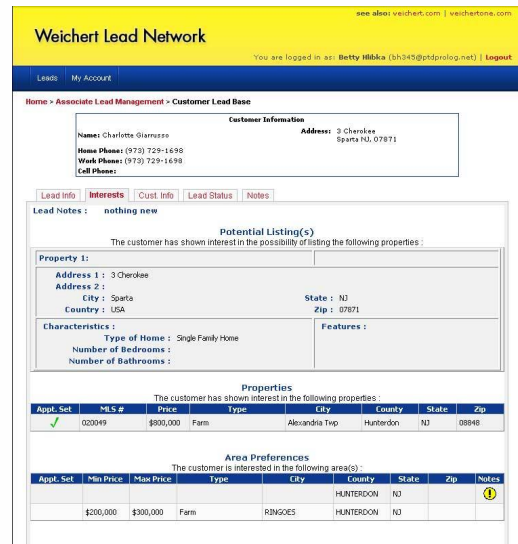
The lead info tab gives you basic information about the lead and what properties and or areas they may be interested in.

There are several tabs available, please reference the table of contents for each of their use.



Interests Tab

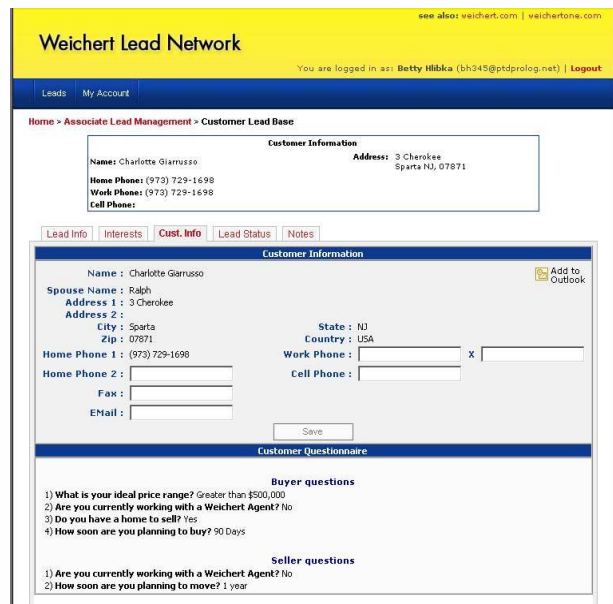
The interests tab tells you specifically which areas or properties the customer would like an appointment for. Anything in which a check mark appears is what has been targeted for an appointment. If the Customer has signed up for a “My Weichert” account any listings he/she clicks on will be gathered in here for your information.



Customer Info Tab

The customer info tab has the information on the customer that was gathered by Weichert Lead Network and is passed to you, the associate, for your information. I.E. name, numbers, address, email

1. You can update any information that has not been collected by Weichert Lead Network.
2. Click **Save**.



Weichert Lead network asks some general information questions. These questions and answers can be found at the bottom of the customer information page, see above example.

Lead Status Tab

This section will show you the history of the lead from beginning to end. Every status that this customer is changed to will be logged in this area.

The screenshot shows the 'Lead Status History' tab selected. It displays a table with columns for Status, Comments, and Updated Time. The status is consistently 'Yet to meet' with various comments like 'nothing new', 'no change', 'sending listings', 'in touch', and 'e-mailed listing'. The last entry is 'Not Yet Updated' with a comment about working with a Spatra agent.

Status	Comments	Updated Time
Yet to meet	nothing new	1/2/2005 10:19 AM
Yet to meet	nothing new	12/27/2004 10:51 PM
Yet to meet	no change	12/19/2004 7:51 PM
Yet to meet	no change	12/12/2004 10:14 PM
Yet to meet	no change	12/6/2004 12:10 PM
Yet to meet	no change	11/29/2004 1:52 PM
Yet to meet	sending listings	11/21/2004 8:52 PM
Yet to meet	sending listings	11/15/2004 12:24 PM
Yet to meet	in touch	11/7/2004 8:43 PM
Yet to meet	sending property listings	11/1/2004 12:53 PM
Yet to meet	e-mailed listing 10/24	10/25/2004 7:59 AM
Not Yet Updated	wt (Betty) Betty Hlibka (Alexandria/HUNTERDON) Cust will also be working with a Spatra agent for seller lead.	10/24/2004 12:10 PM

Notes Tab

This is an area that you can place notes:

The following options are available:

- Customer Complaint
- Customer Follow up
- Customer preference
- Lead Information
- Rescheduled

To add:

1. Choose **Note Type**
2. Add Notes in the box
3. Click the **Add** Button

The screenshot shows the 'Notes' tab selected. It features a form to add a note with a dropdown for 'Note Type' (set to 'Customer complaint') and an 'Add' button. Below the form is a table listing existing notes.

Date	Associate Name	Sales Agent Name	Note Type	Note
10/24/2004		Michael Nastri	Lead Information	wt (Betty) Betty Hlibka (Alexandria/HUNTERDON) Cust will also be working with a Spatra agent for seller lead.

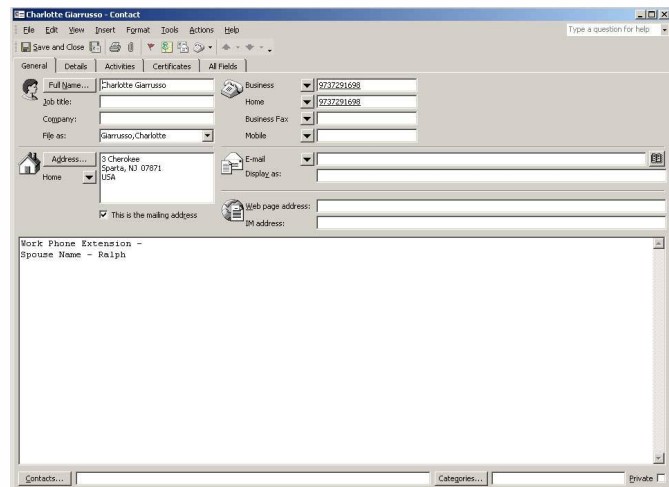
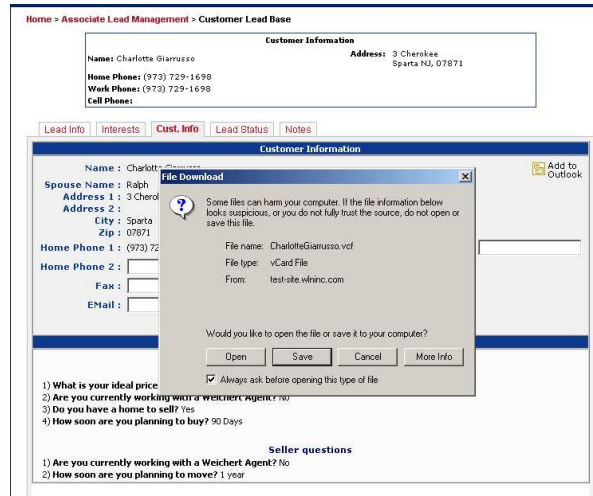
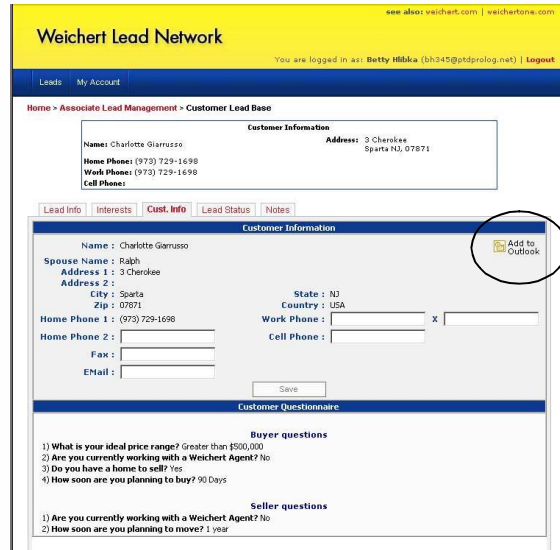
Click on the link **Lead Notes**: to see only those notes put in by you, your manager, and RVP.

Click on the link **All Notes** to see all notes put in by you, your manager, and RVP as well as the contact center.

How to Add a Leads Contact info to Microsoft Outlook

You can add the contact information for any lead to your Microsoft Outlook contacts, at the click of a button. Follow the simple instructions below.

1. Click **LEADS**.
2. Click **Lead Management**
3. Find your customers name, and click on it
4. Click on Customer info tab
5. Click on the **“Add to Outlook”** link.
6. Click on **“Open”**
7. A new box opens with the information.
8. Click **Save and Close**
9. This will now be apart of your contacts list.



How to Reactivate Leads

Sometimes a lead will need to Inactivate a lead from our portal due to lack of contact with the customer (i.e. Customer doesn't return calls or emails) then all of a sudden pop back up after you have inactivated them from your portal. You now have the ability to reactivate the lead yourself right from your portal.

1. Click **Leads**
2. Click **Leads Management**
3. Click on the **Inactive Leads** Tab
4. Locate the Customer's name on the list
5. Click on the **Edit** link.
6. Choose the Status the best fits your needs and then put in a note why you are reactivating this lead.
7. Click **Save**

The lead(s) you have chosen to reactivate are now available in your portal once again for updating under the Active Tab.

The screenshot displays the 'Weichert Lead Network' portal interface. At the top, there is a yellow header with the company name and a link to 'see also: weichert.com | weichertone.com'. Below this, a blue navigation bar shows 'Leads' and 'My Account' tabs. The main content area is titled 'Home > Associate Lead Management' and 'Betty Hlibka's Leads'. It features a 'Lead Statistics' section with various counts: Total Leads: 17, Inactive Leads: 16, New Leads: 0, Closed Leads: 0, Active Leads: 1, Under Contract Leads: 0, Long Term Active Leads: 0, and Delinquent Leads: 0. Below the statistics are search filters for 'Last Name Search' and 'Date Search'. The primary section is 'Inactive Leads (16)', which contains a table with columns for Type, Customer Info, Contact Info, and Current Status/Note. Each row includes an 'Edit' link. The table lists several leads, such as Mike Adams, Charles Allen, Gail Biancamano, Joseph Clymore, Annette D'angelo, Denise Evarts, and Sherry Freeman, with their respective contact details and status notes.

Type	Customer Info	Contact Info	Current Status/Note	Edit
Buyer	Mike Adams Flemington NJ, 08822	Work: (908) 903-2190 maieradamsfamily@earthlink.net	CI - Inactive (Updated: Jan 3 2005 2:44PM) CI - LVM	Edit
Buyer	Charles Allen 929 South Ave Plainfield NJ, 07062	Home: (732) 762-4428 thadoctor@comcast.net	CI - Inactive (Updated: Sep 27 2004 9:43AM) lvm-tv-9/27/04	Edit
Buyer	Gail Biancamano 72 Brighton Way North Brunswick NJ, 08902	Work: (732) 422-3459 xgbianca@yahoo.com	CI - Inactive (Updated: Dec 30 2003 1:43PM) LVM message regarding home search.	Edit
Buyer	Joseph Clymore 6 Devonshire Ct Flemington NJ, 08822	Home: (908) 788-7129 Cell: (908) 399-9370 jclymore@hotmail.com	CI - Inactive (Updated: Dec 30 2003 1:58PM) Left message with family member regarding home search.	Edit
Buyer	Annette D'angelo 200 Merrymount St Staten Island NY, 10314	Home: (718) 370-1752 Work: (718) 370-1752 Cell: (917) 757-9668 AD1andAD2@aol.com	Inactive - Return Lead to Lead Network (Updated: Nov 30 2003 8:41PM) No contact.	Edit
Buyer	Denise Evarts Po Box 434 33 Water St Milford NJ, 08848	Home: (908) 995-4504 devarts@verizon.net	CI - Inactive (Updated: Nov 7 2004 8:45PM) Put on hold -Jy	Edit
	Sherry Freeman 2048 Marina Lakes Blvd	Home: (407) 333-9197 Cell: (407) 461-1001	Inactive - Return Lead to Lead Network (Updated: Jan 3 2005 12:03PM)	