Weichert Lead Network

Associate Portal Guide

Updated:
May 2005

Introduction

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

Updating Requirements

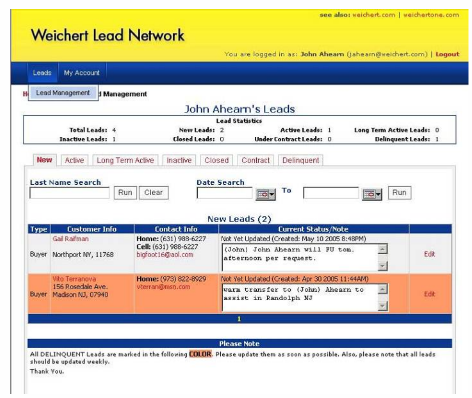
You are required to update a **minimum of once a week**, between Wednesday morning at 12:01 AM and Tuesday evening at 11:59 PM.
(What does that mean for me?)
What that means is you can update any day of the week as long as it is by Tuesday.
Long term active leads are required to be updated every 4th 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.

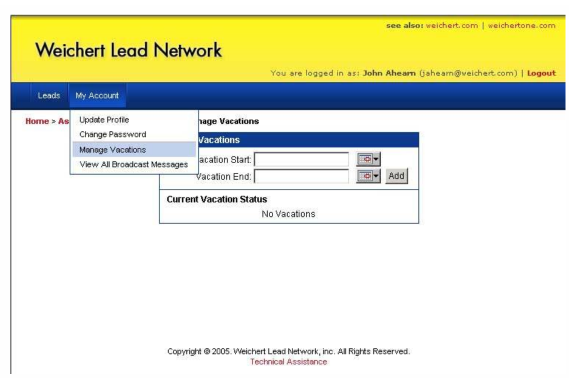
Bread Crumb Trail – The bread crumb trail can be found at the top of the screen just underneath the menu. Instead on hitting the Back Button to go to the previous screen you can use the bread crumb trial.

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



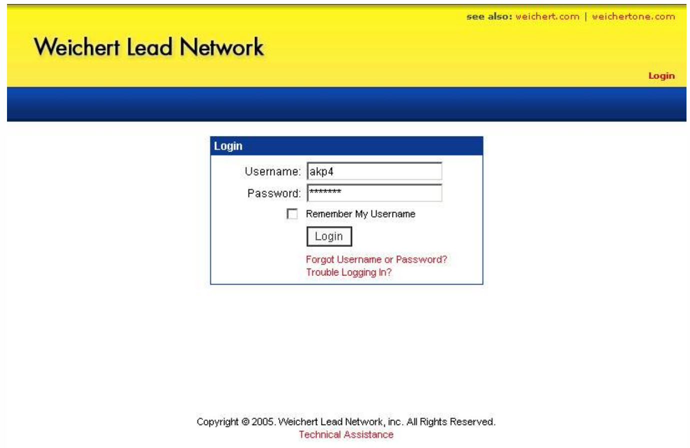
2) Then the User Clicks on My Account on the Menu and then Manage Vacation

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.**



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

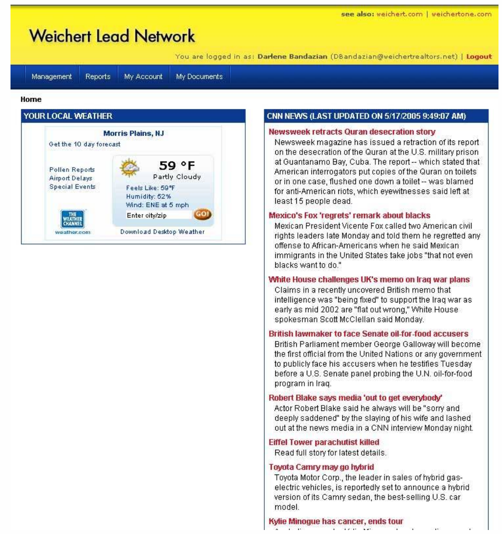
How to get my Username and/or Password

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.

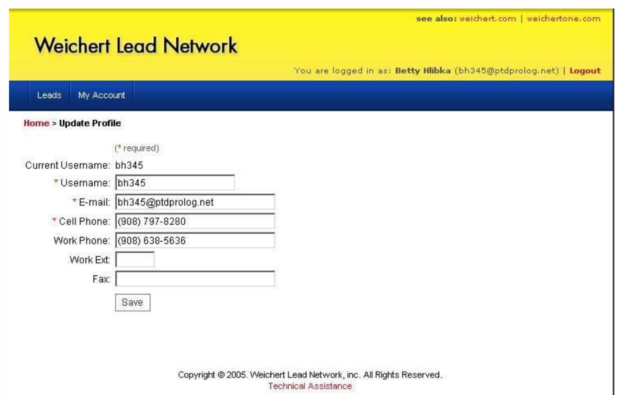
Home

- ❖ **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!”



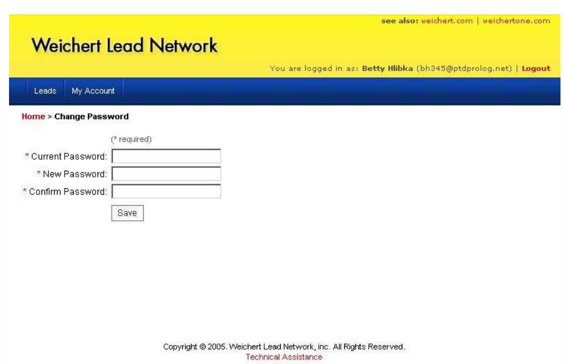
How to update my Email/Cell Phone/Username

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.**



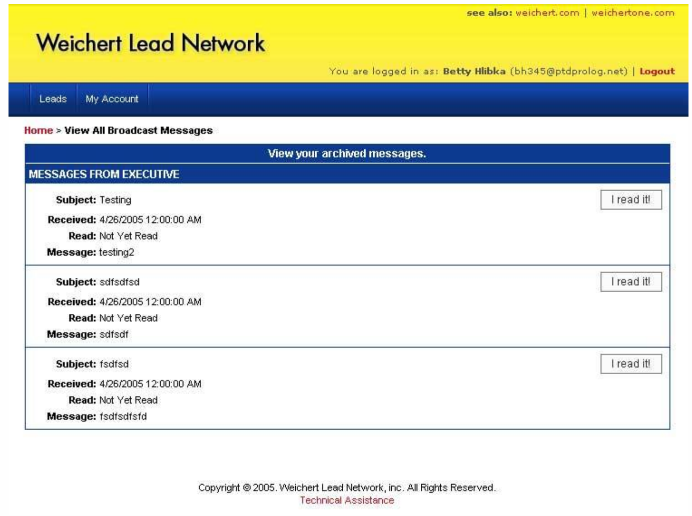
How to update my password

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

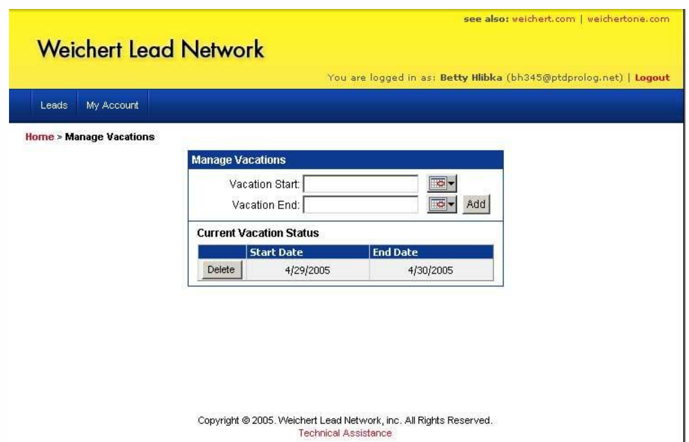
1. Click on the **My Account**
2. Click on **View all Broadcast Messages**



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

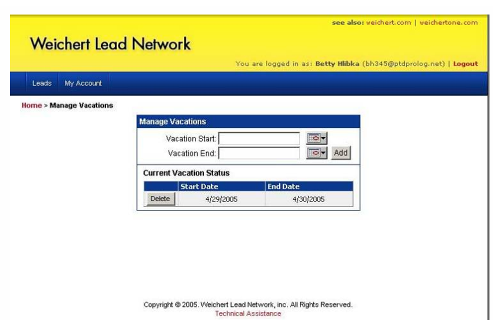
How to put yourself on Vacation

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.

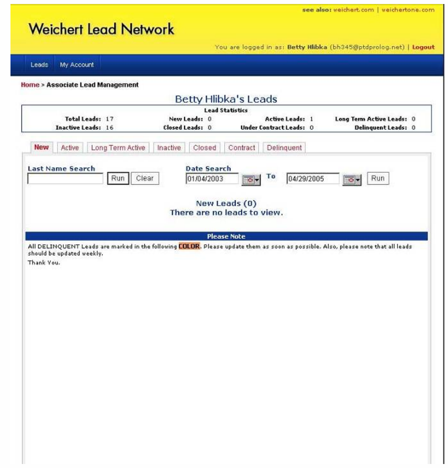


How to Cancel a Vacation

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



<u>How to update your leads</u>



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 Definitions

Buyer - 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

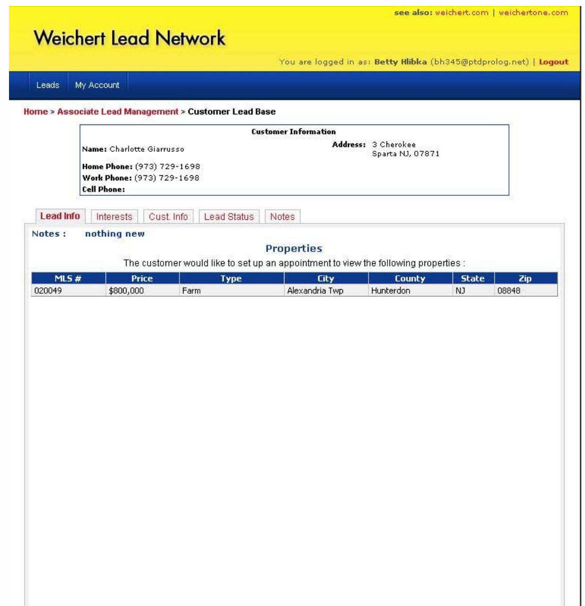
Appointment scheduled	Self Explanatory
Inactive – Return To Lead Network	**Removes a lead that you no longer want to work with from your portal.**
Initial presentation made	Self Explanatory
Lead Successfully Closed	**When customer has gone through closing and title has passed.**
Listing taken	Self Explanatory
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

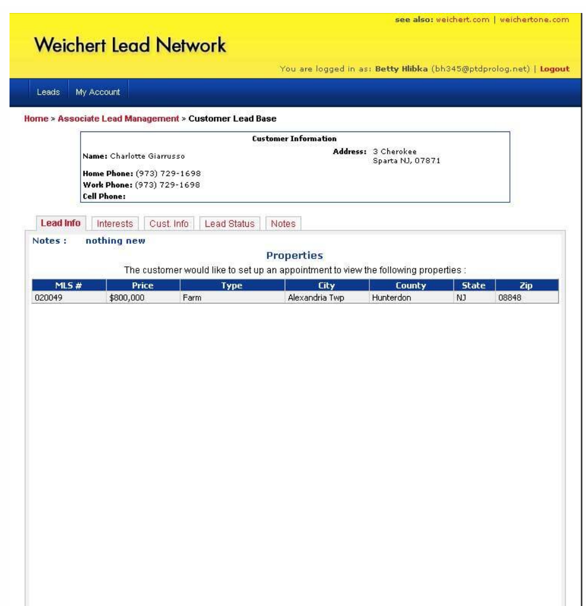
The Associate Lead Management page will give you some pertinent information to begin with such as name, address, type of customer (Buyer/Seller), phone numbers (up to 3, home, cell, and work), email address, current status, and the date that status was last entered. To get more detailed information follows 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 customers name
   The following screen will be displayed:
   There are several tabs available, please reference the table of contents for each use.



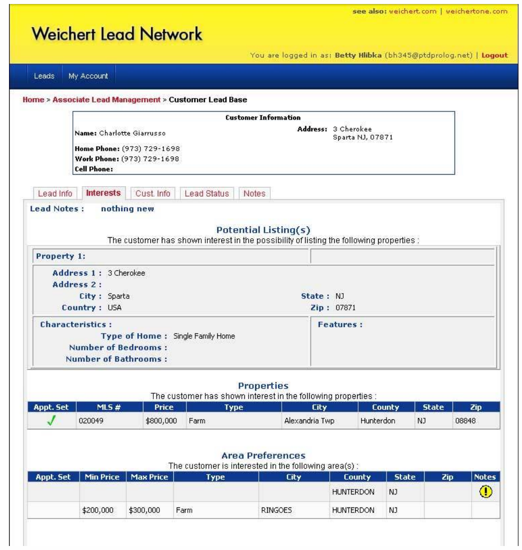
Lead Info Tab

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



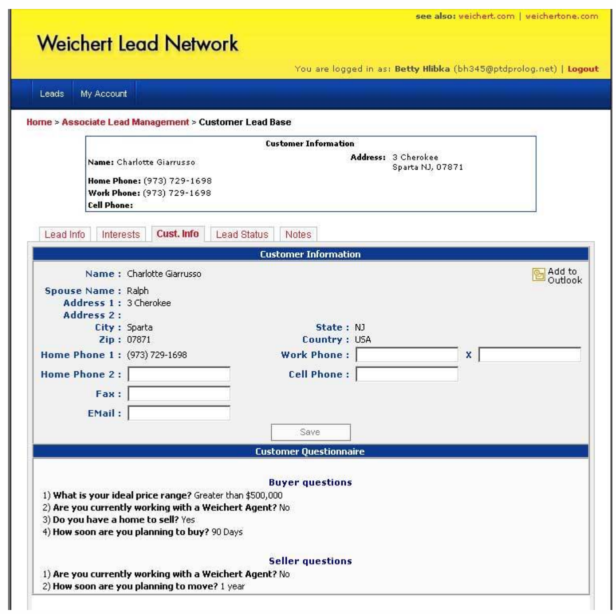
There are several tabs available, please reference the table of contents for each of their use.

<u>Interests Tab</u>
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.



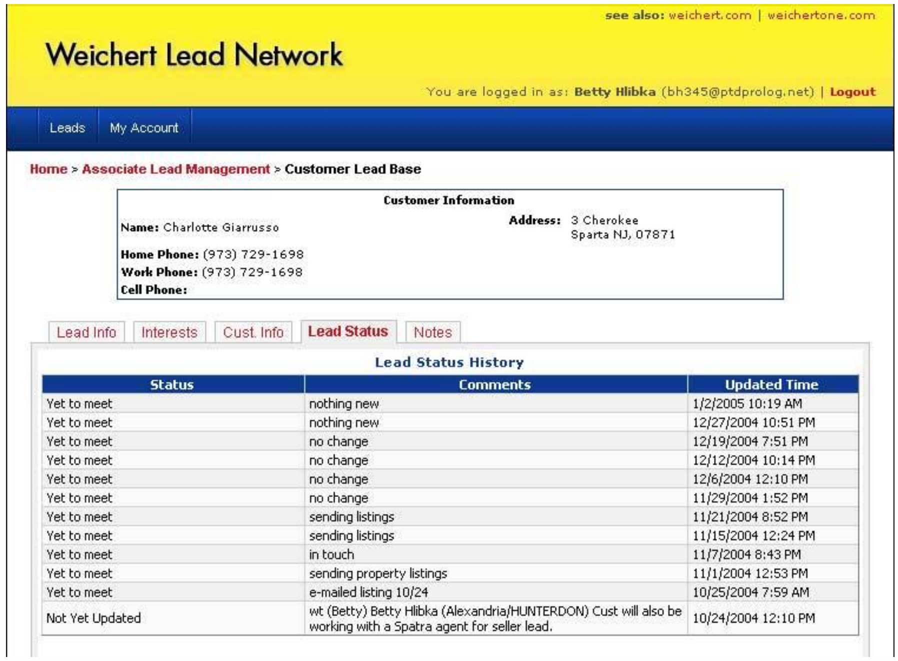
<u>Customer Info Tab</u>
The customer info tab has the information on the customer that was gathered by Weichert Lead Network and is passed to you, the associate, for your information.
I.E. name, numbers, address, email

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

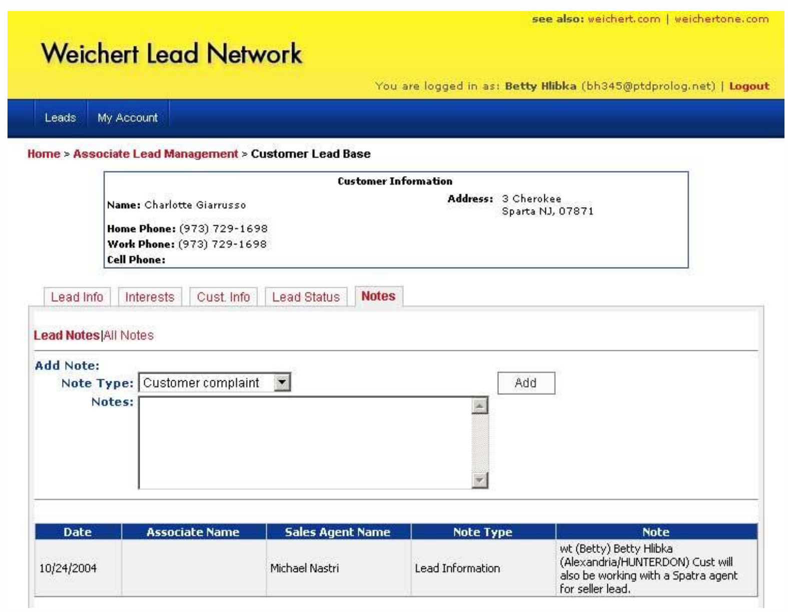


Weichert Lead network asks some general information questions. These questions and answers can be found at the bottom of the customer information page, see above example.

<u>Lead Status Tab</u>
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.



<u>Notes Tab</u>
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

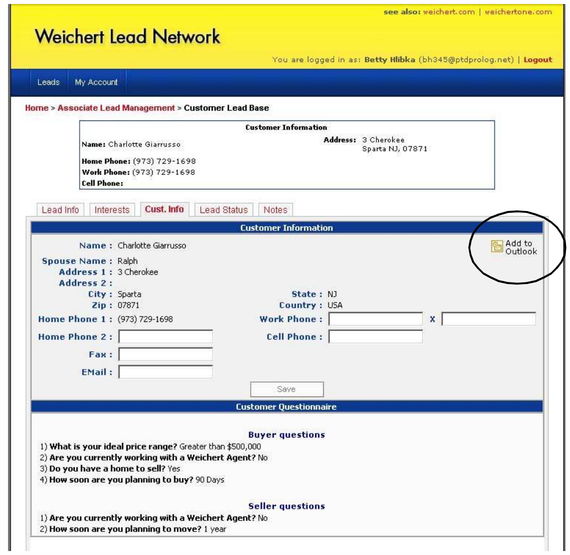
Click on the link **Lead Notes**: to see only those notes put in by you, your manager, and RVP.

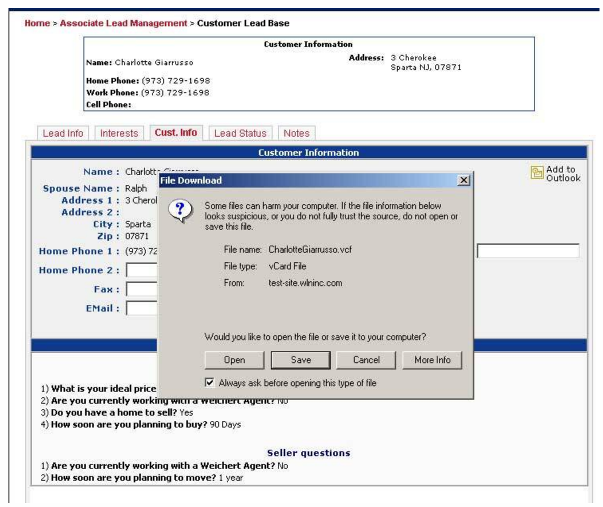
Click on the link **All Notes** to see all notes put in by you, your manager, and RVP as well as the contact center.

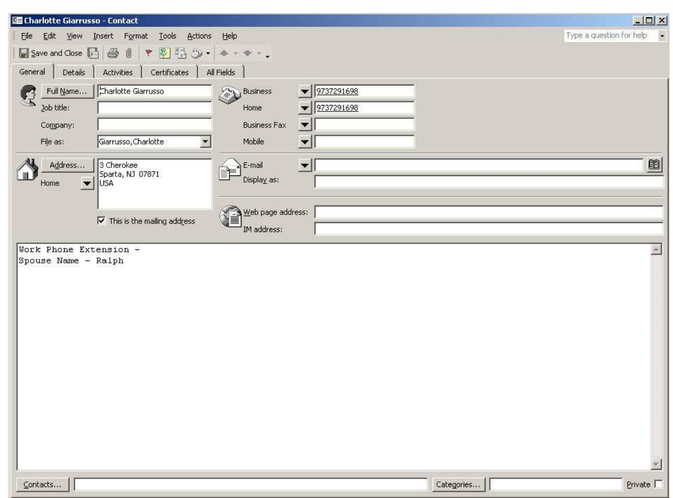
How to Add a Leads Contact info to Microsoft Outlook

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.