Weichert Lead Network

Managers Portal Guide

Updated:
November 2006

Introduction

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

How to Logon

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

Updating Requirements for Associates

Your associates 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 that means is they can update any day of the week as long as it is by Tuesday.
Long term active and Under Contract leads are required to be updated every 4th week, between Wednesday morning at 12:01 AM and Tuesday evening at 11:59 PM.
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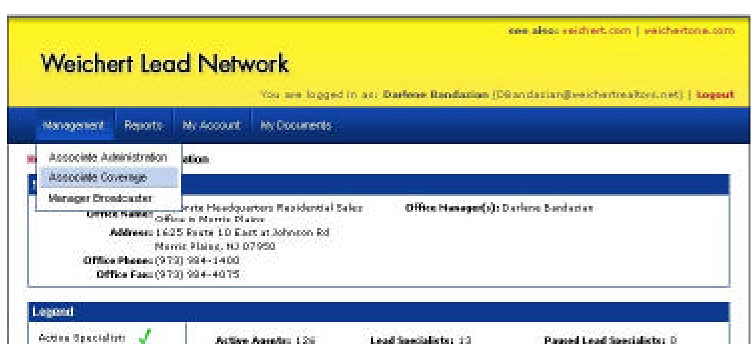
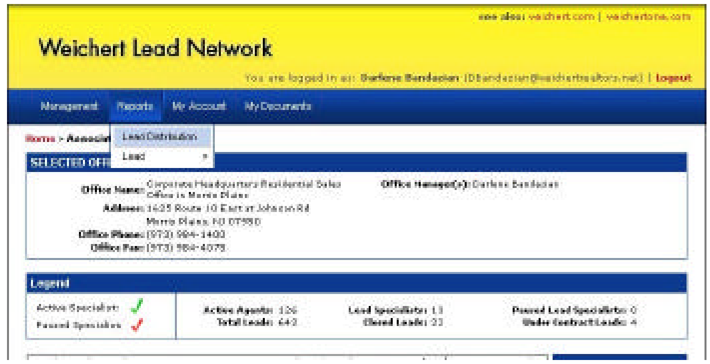
Important Information:

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. Managers when viewing Reports in Adobe, **YOU MUST USE the BACK** button once in ADOBE to get back to the Portal.
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 Management on the Menu and then clicks on Associate Coverage (Shown Below)



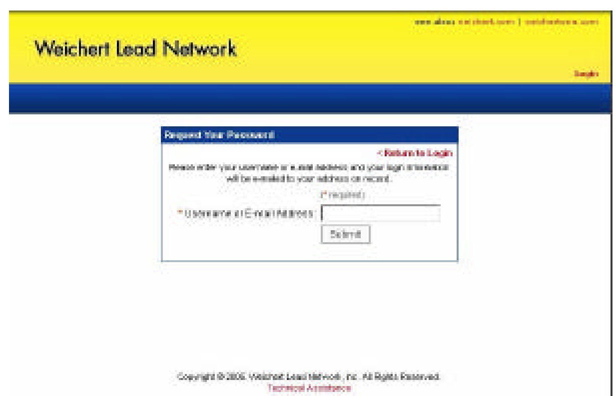
2) Then the User Clicks on Reports on the Menus and then Lead Distribution



Now if the User wants to go back to the Associate Coverage page instead on hitting the Back Button to go to the previous screen the user can click on Associate Coverage (Manager/LC) on the Top Navigation bar

How to get my Username and 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

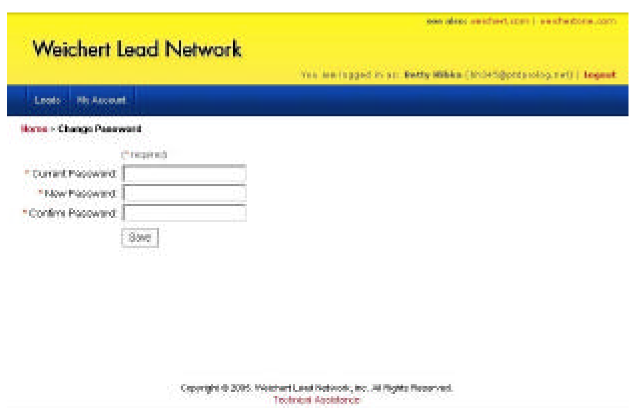
The Home page is displayed when you log in. There are some helpful links, they are:

- **Messages from WLN, System Administrators, Manager, RSM, and the 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 **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 **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 Send Broadcast Messages

As a manager you can send messages to your lead specialists via the portal using the Manager Broadcaster.

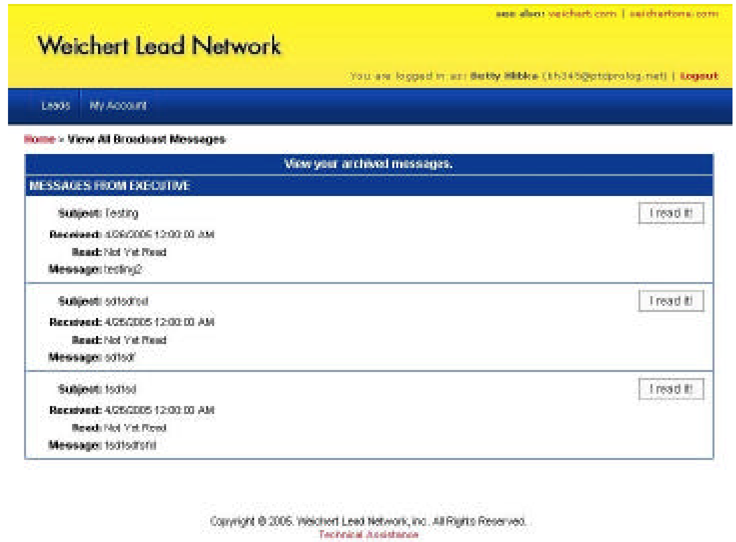
1. Click on **Management**
2. Click on **Manager Broadcaster**
3. Select who the message will go to
    - If choosing all of your Lead specialists simply check the box to the left of "Lead Specialists"

    - If you only want to send the message to certain associates click on the "+" symbol to the left of the "Lead Specialists" and it will expand to reveal the Office, then click on the "+" symbol next to the office name to revel the individual lead specialists names, and simply put a check mark next to the people you want to receive the message.

4. Choose a Start and End Date – This will set how long the message will display as a new message in the associates portal – the Default is 1 week.
5. Enter in a Subject
6. Enter in a Message
7. **Check Spelling** before sending the message
8. Click **Send Message** to send the message out

How to View All Broadcast Messages

1. Click on **My Account**
2. Click on **View All Broadcast Messages**

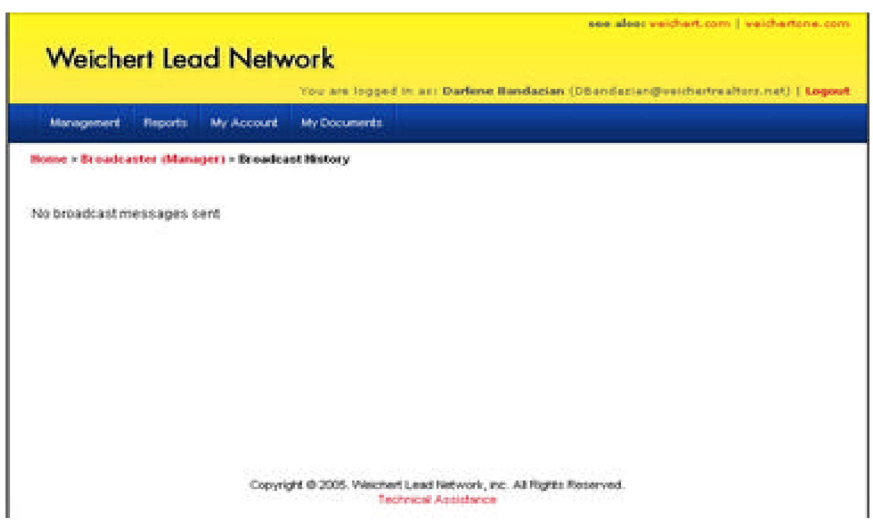


To view messages that have already been read, click on the **View your archived messages** link.

How to View Broadcast History

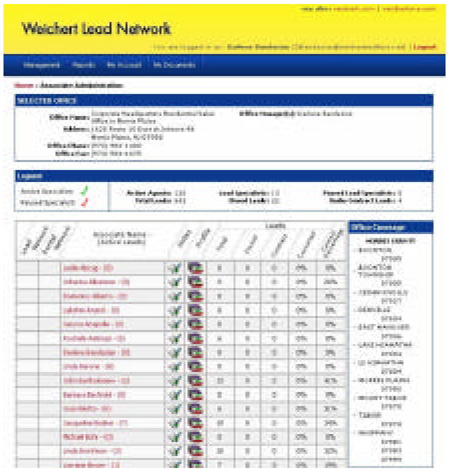
The broadcast history page will give you an expandable list of each broadcast message that you sent. When the messages are "expanded," there will be 2 expandable links: *Message Details* and *Recipients*. *Message Details* provides information related to the message, such as subject, message text, etc. *Recipients* lists all of the intended recipients for the broadcast message, along with their message status (not read, or the date the message was read). If there are more than 50 recipients, the detail data for recipients will not be available; however, a summary will be displayed that shows the number of recipients who have read the broad cast and the number of recipients who have not.

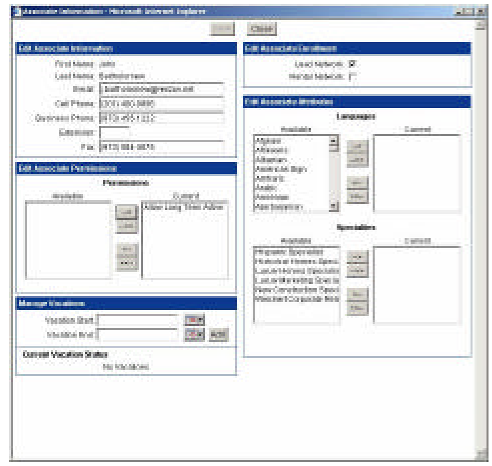
1. Click on the **My Account**
2. Click on **Broadcast History**



How to Add a Lead Specialist

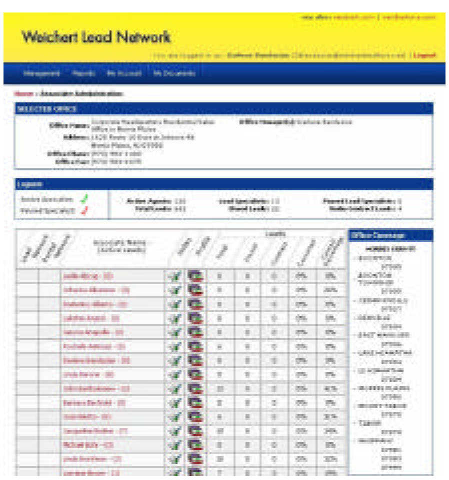
1. Log in to the portal
2. Click on **Management**
3. Click on **Associate Administration**
4. Click on the **Card File** in the profile column next to the associate you want to add to the Network.
5. In the top right hand corner, put a check mark next to Lead network.
6. Click **Save**
7. Click **Close**

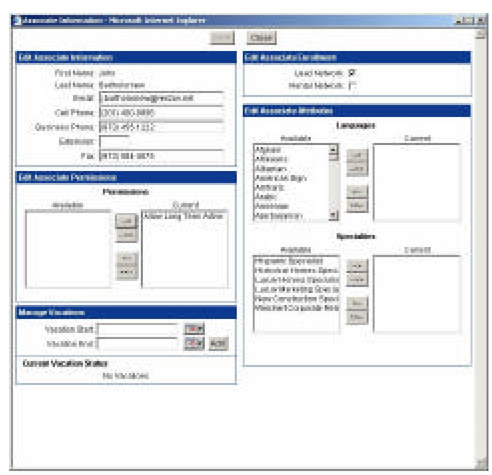




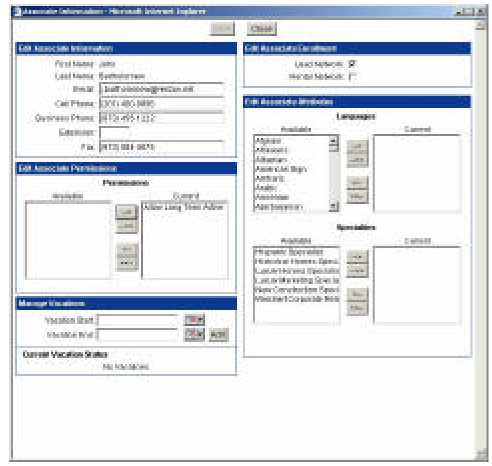
How to Remove a Lead Specialist

1. Log in to the portal
2. Click on **Management**
3. Click on **Associate Administration**
4. Click on the **Card File** in the profile column next to the associate you want to remove from the Network.
5. In the top right hand corner, uncheck the check mark next to Lead network.
6. Click **Save**
7. Click **Close**





How to Edit an Associates Cell Phone and Email Address



1. Log in to the portal
2. Click on **Management**
3. Click on **Associate Administration**
4. Click on the **Card File** in the profile column next to the associate you want to edit.
5. In the top left hand corner, update the info you need to (Email, cell…)
6. Click **Save**
7. Click **Close**

How to Edit Associates Languages and Specialties

1. Log in to the portal
2. Click on **Management**
3. Click on **Associate Administration**
4. Click on the **Card File** in the profile column next to the associate you want to add to the Network. When the box appears

   For languages:

   - Select the languages from the **Edit Associate Attributes** box on the Left and using the "→" button; add it to the box on the Right hand side. (- - > > Will add whole list -- > will add only select items)
   - Removing use < <- - to remove all and use < - - to remove only selected.

   For Specialties:

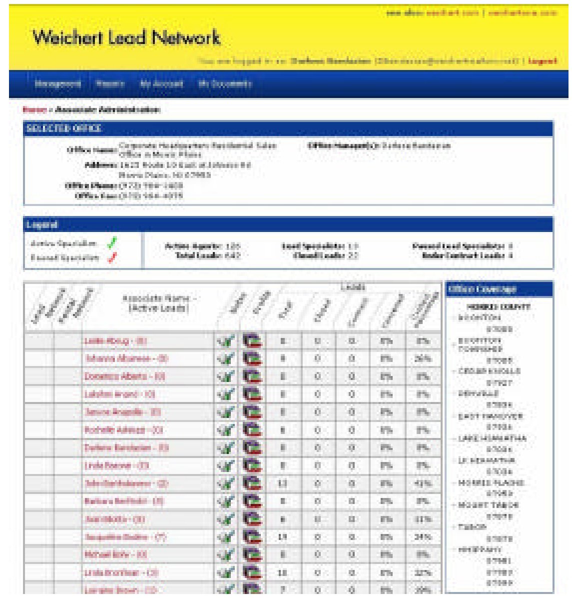
   - Select the Specialties from the **Edit Associate Attributes** box on the Left and using the "→" button; add it to the box on the Right hand side. (- - > > Will add whole list -- > will add only select items)
   - Removing use < <- - to remove all and use < - - to remove only selected.

5. Click **Save**
6. Click **Close**

Holding down your Control key on your keyboard (CRTL) and clicking on multiple selections enables you to add the selected items all at once.

How to Get an Overview of the Leads for your office

1. Log in to the portal
2. Click on **Management**
3. Click on **Associate Administration**
   - The Total column gives you the total number of leads that the agent has received.
   - The Closed column indicates the number of leads that have closed, out of the total number given.
   - The Contract column indicates the number of leads that are under Contract.
   - The Converted column is a percentage of Closed to Total number of leads.
   - The Contact Percentage number represents the amount of time we get a hold of the associate. Example: Someone with a rating of 70% means, we get a hold of them and do a warm transfer of a lead, and 30% of the time they don't answer the phone or it goes into voicemail, etc….

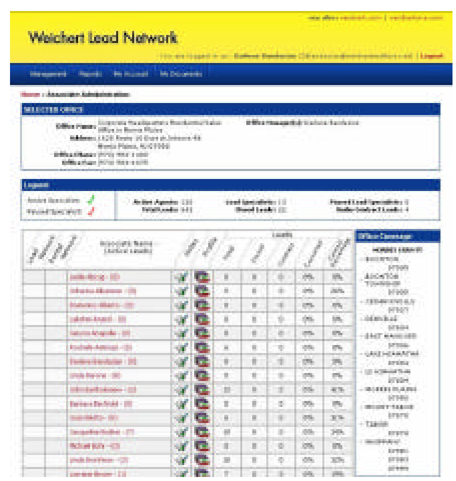


How to View the Office Coverage

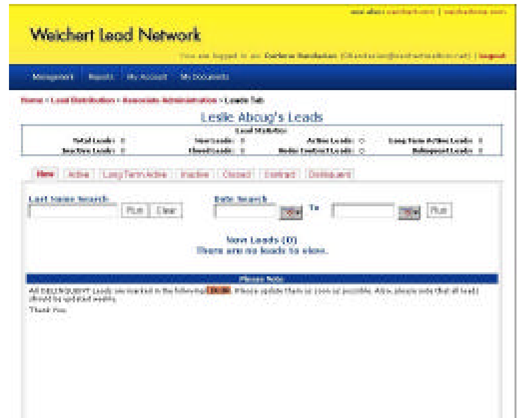
Each office is set to cover specific cities/towns. To see the list follow the instructions below:

1. Log in to the portal
2. Click on **Management**
3. Click on **Associate Administration**

You can see the list in the right hand column. Please speak with your RSM to make changes.



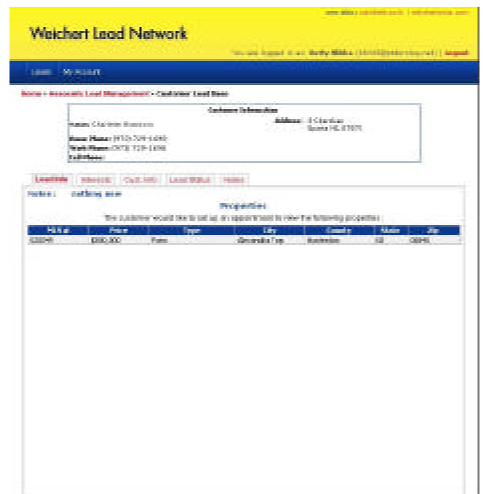
How to View Leads for an Associate



1. Log in to the portal
2. Click on **Management**
3. Click on **Associate Administration**
4. Click on the Associates Name.
5. You can click through each tab to get the status of each set of leads (New, Active, Long Term Active, Inactive, Closed, Contract, Delinquent).

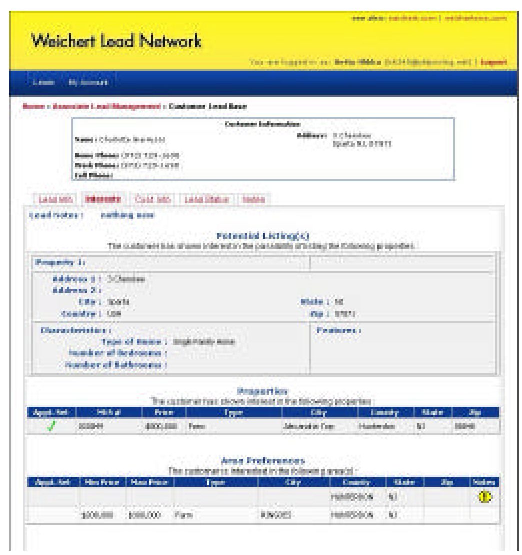
To find out more information on each of the specific leads click on the customer's name. The following tabs are available to click on: Lead Info, Interests, Customer Info, Lead Status, and Notes.

Please see below for each tab function.



Info Tab

The Info Tab gives you basic information about the lead and what properties and/or areas they may be interested in.

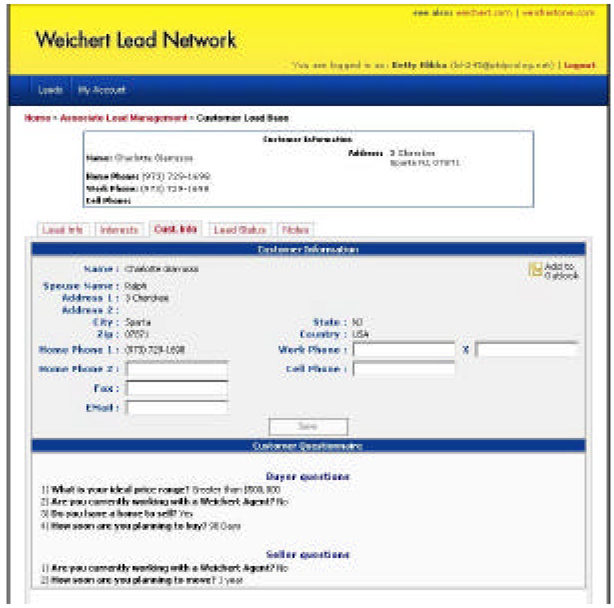


Interests Tab

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 the associates 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 the associate for their information.
I.E. Name, Numbers, Address, Email

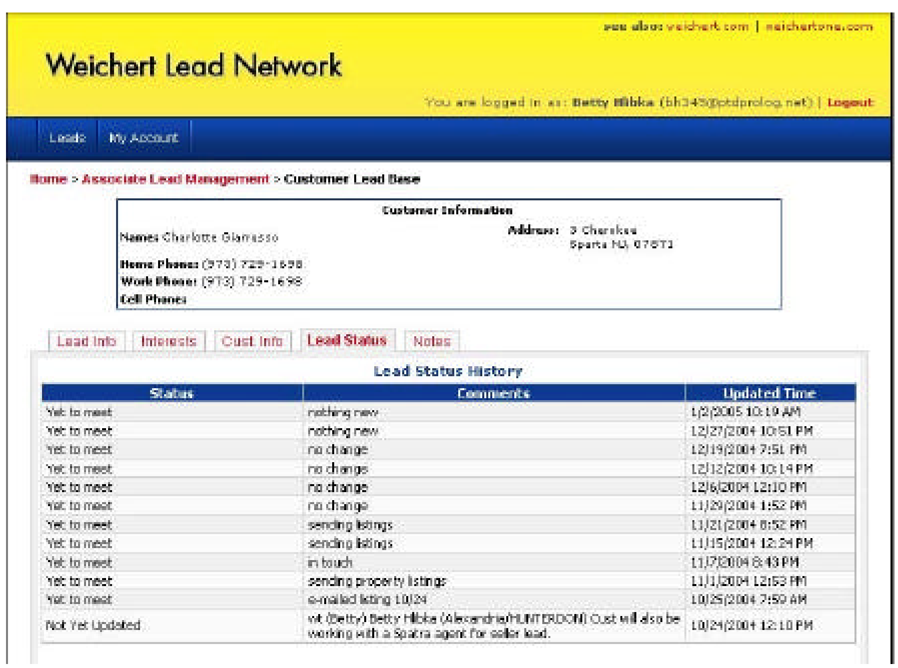


1. You can update any information that has not been collected by Weichert Lead Network.
2. Click **Save.**

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.

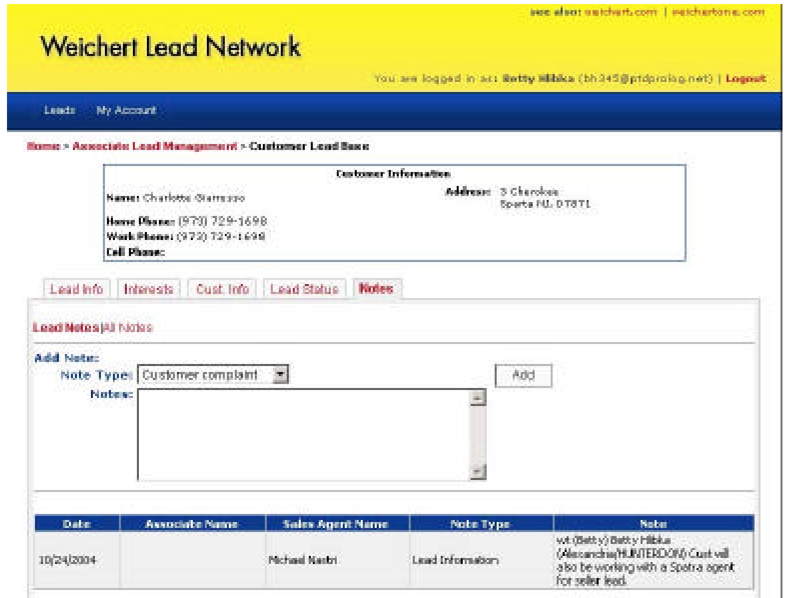
Lead Status Tab

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.



Notes Tab

This is an area that you can leave a note for the agent



To add:

1. Add Notes in the box
2. Click the **Add** Button

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

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

Status Definitions

Buyer - Lead Status Definitions

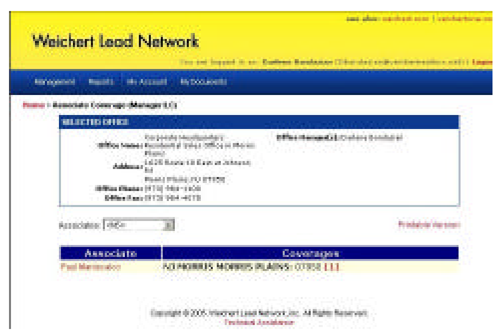
Anticipated offer fourth coming	Self Explanatory
Appointment set to see a listing	Self Explanatory
High interest in visited listings	Self Explanatory
Inactive – Return To Lead Network	**Removes a lead that you no longer want to work with from your portal.**
Lead Successfully Closed	**When customer has 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

<u>How to give an associate specific town coverage</u>

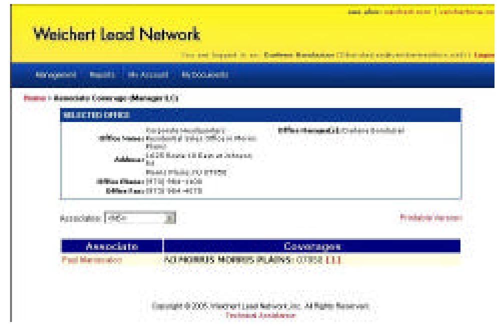
As the manager you have the ability to set Associate Coverage areas based on what the office is currently covering.



1. Log in to the portal
2. Click on **Management**
3. Click on **Associate Coverage**
4. Choose an **Associate** from the drop down menu
5. Use the **WLN Counties/Cities/Zips** box on the left and click to highlight the cities that this agent will cover.
   Note: You can Select Multiple cities by holding down your Control (CTRL) key on your keyboard and clicking on the town names.
   Note: This coverage is limited to only what your office covers, to add coverage beyond what you office already covers, speak with you RSM.
6. Use the top → arrow button to move it over to the **Selected Counties/Cities/Zips**
7. Click **Save**

You can also Sort by City, Zip or County by clicking on the Sort by City, Zip or County buttons.

How to Remove town Coverage for Associates



1. Log in to the portal
2. Click on **Management**
3. Click on **Associate Coverage**
4. Choose an **Associate** from the drop down menu
5. Use the **Selected Counties/Cities/Zips** box on the Right and click to highlight the cities that will be removed from the coverage area.
   Note: You can Select Multiple cities by holding down your Control (CTRL) key on your keyboard and clicking on the town names.
6. Use the bottom ← Arrow button to remove Cities
7. Click **Save**

You can also Sort by City, Zip or County by clicking on the Sort by City, Zip or County buttons

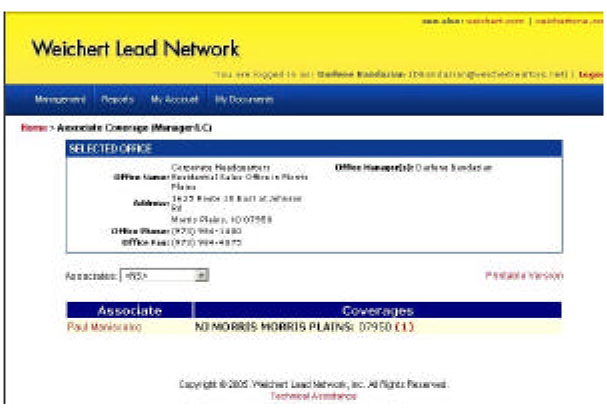
Associate Coverage Area Report

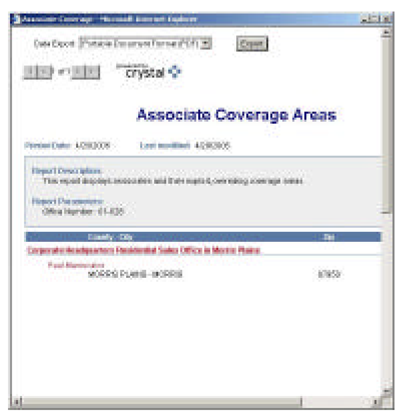
To find out which associates in your office have a specific coverage areas, and what those coverage areas are.

1. Click on **Management**
2. Click on **Associate Coverage**

The list of associates who have specific coverage's will appear. To change the areas, click on the agent's name or to add new coverage for an associate click on the drop down menu of names.

Click on the **Printable Version** link to print out this report.

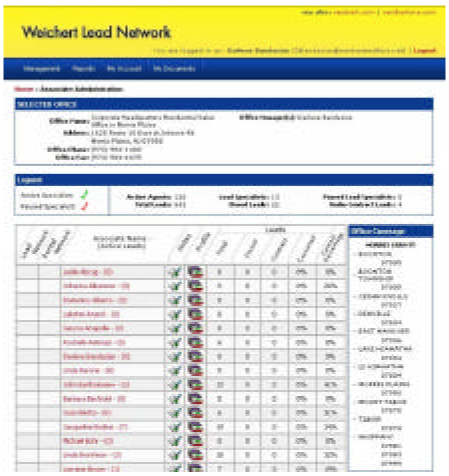


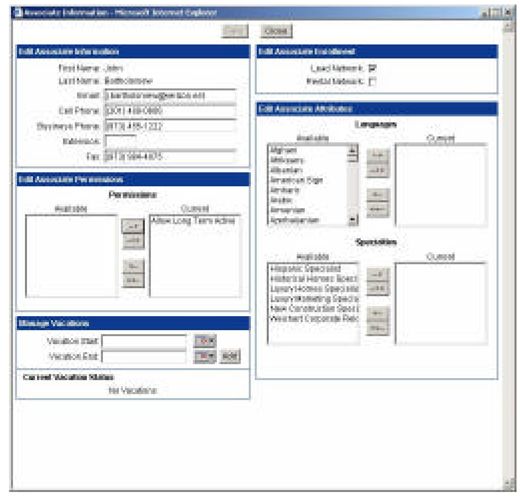


How to Pause an Associate from Leads

This will stop the agent from getting leads.

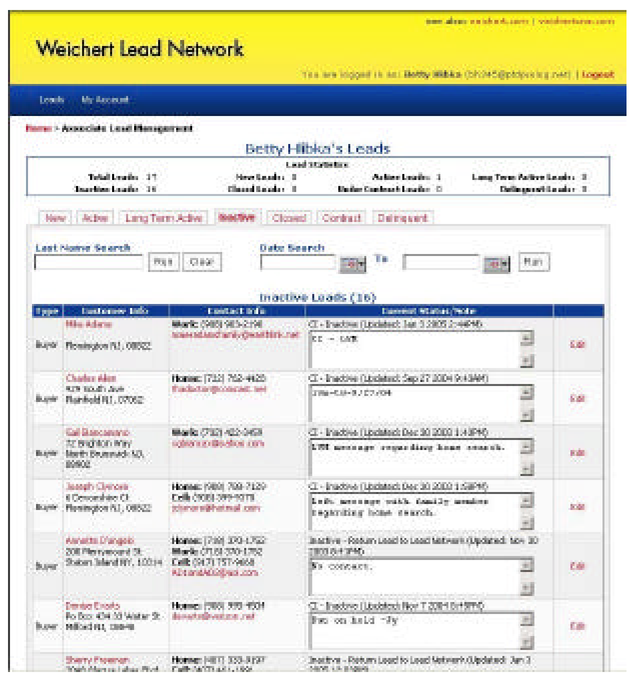
1. Log in to the portal
2. Click on **Management**
3. Click on **Associate Administration**
4. Click on the **Card File** the profile column next to the associate you want to add to Pause.
5. Put a **Check mark** in the box next to pause.
6. Fill in the reason Why you are Pausing them, also put in a enable date (When you want them to receive leads again)
7. Click **Save**.





How to Reactivate Leads:

Sometimes an associate will need to inactivate a lead from their portal due to lack of contact with the customer (i.e. Customer doesn't return calls or emails). Then all of a sudden the customer pops back up after they have inactivated them from their portal. Associates have the ability to reactivate the lead right from their portal. You as the manager can do so as well:



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

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

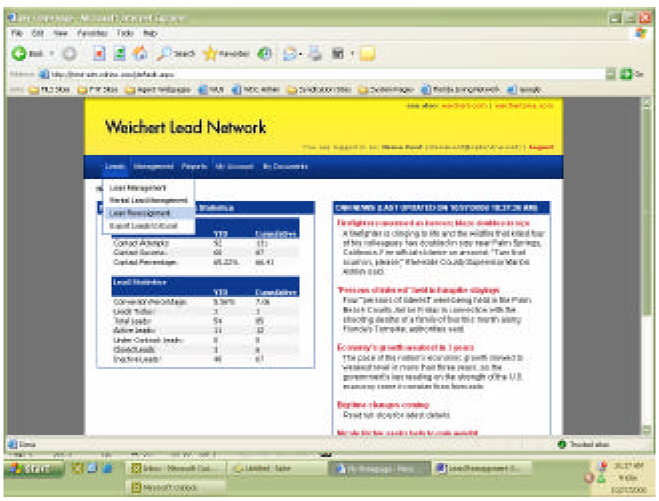
Reassigning Leads

As the Manager/LC you can reassign the inactive leads from your new Inactive Call Sessions.

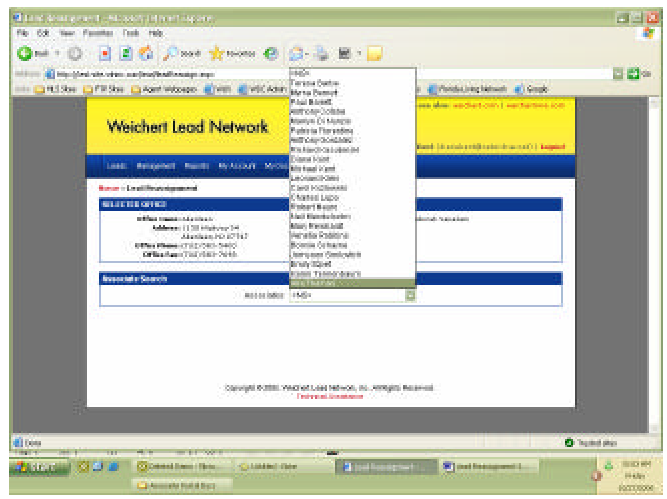
How to Reassign Leads:

1. Login to http://www.weichertleadnetwork.com
2. Click on **LEADS** link.
3. Click on **Lead Reassignment** *(Screen A)*
4. Choose an associate's Name or for the Full office list leave the selection as <NS> *(Screen B)*
5. Find the customers name on the list *(Screen C)*
6. Click on the **Edit** link
7. Choose the associate that the Lead will go to.
8. Enter in a comment (Why is the lead being reactivated, This is required) *(Screen D)*
9. Click **Save**

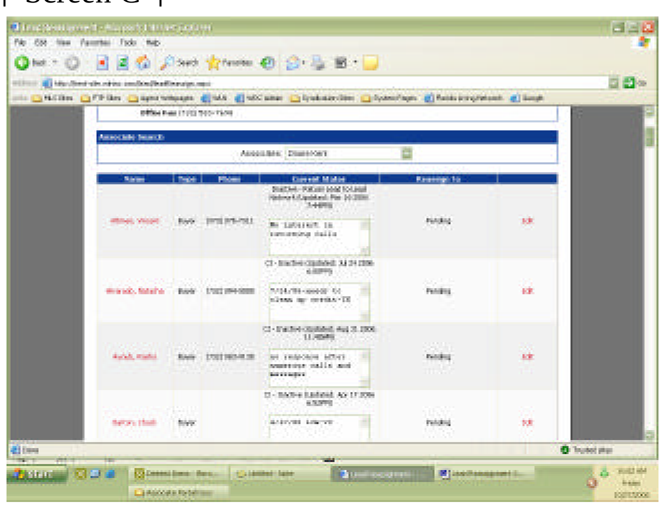
Screen A



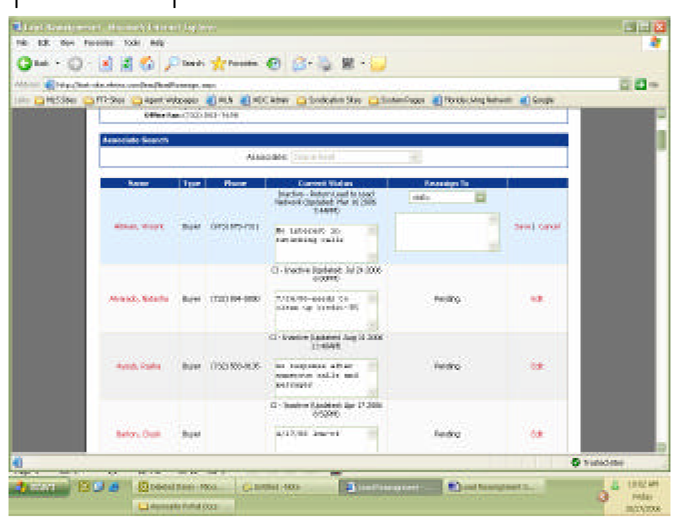
Screen B



Screen C



Screen D



To Export Inactive Leads to Excel Spreadsheet.

As a Manager/LC you can export the list of inactive leads to for one particular associate or for the Whole off to and excel Spread Sheet. In order for this feature to work you need to make sure that you have www.weichertleadnetwork.com as a trusted Site….See below on how to add a trusted site.

How to add a website as a trusted site

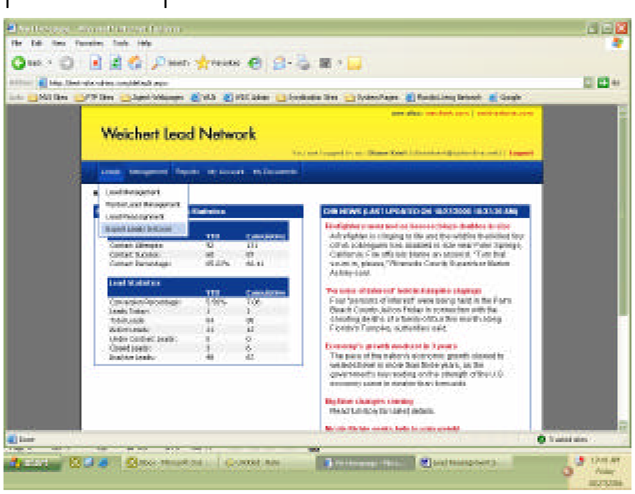
1. Open Internet Explorer
2. Click on the Tools Menu
3. Click on Internet Options
4. Click on the Security tab (2nd tab at the top)
5. Click on the green circle labeled Trusted sites
6. Click on the button labeled sites
7. In the box that says "add this website to the zone" type in http://www.weichertleadnetwork.com
8. Uncheck where it says require server verification
9. Click on the Add button
10. Click on ok to close box
11. Click on Ok again to close second box.
12. Restart Internet Explorer and try again.

****Note:* *If you are still having trouble opening the export after you have added the trusted site. Hold down the control key { Crtl } on your keyboard WHILE you hit the* ***Export Leads To Excel button.***

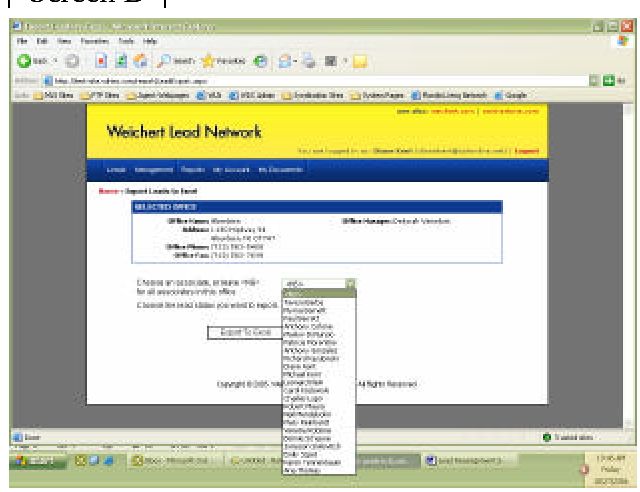
How to Export Leads to Excel:

1. Login to http://www.weichertleadnetwork.com
2. Click on **LEADS** link.
3. Click on **Export Leads To Excel** *(Screen A)*
4. Choose an associate's Name or for the Full office list leave the selection as <NS> *(Screen B)*
5. Choose the Lead Status to export (Inactive) *(Screen C)*
6. When Prompted with file download Box Click **Open** (Screen D)
7. The excel spreadsheet will open and you are ready to print out your document. (Screen E)

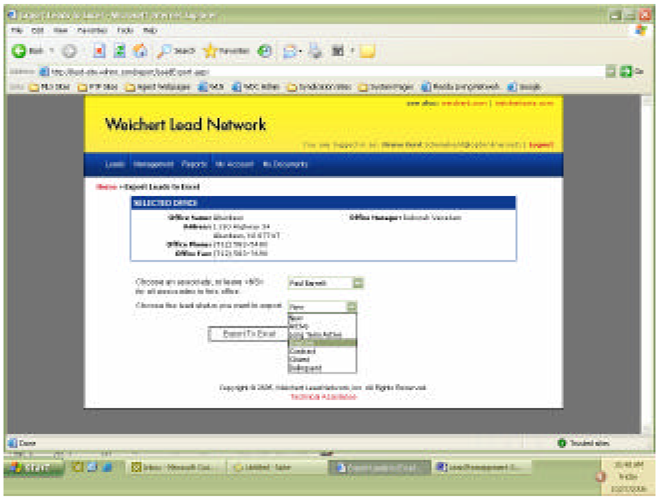
Screen A



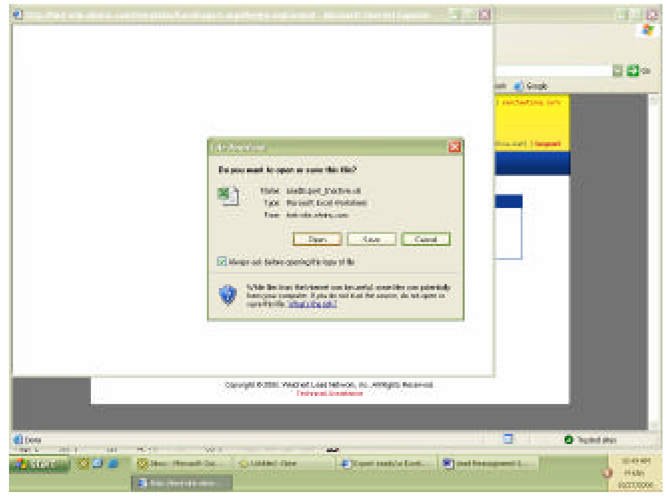
Screen B



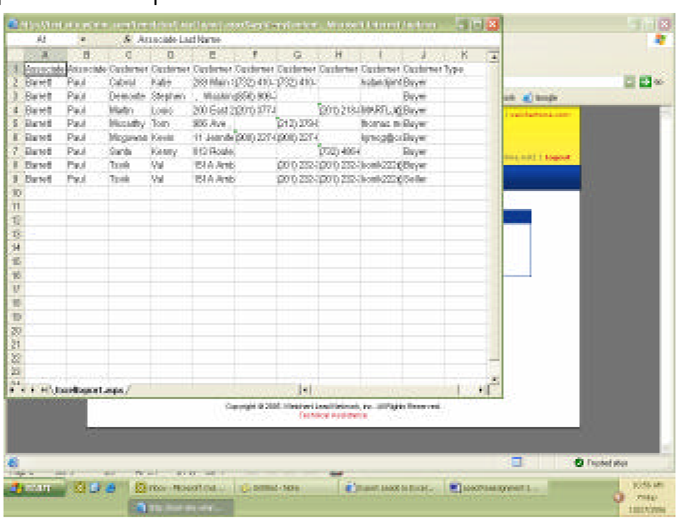
Screen C



Screen D

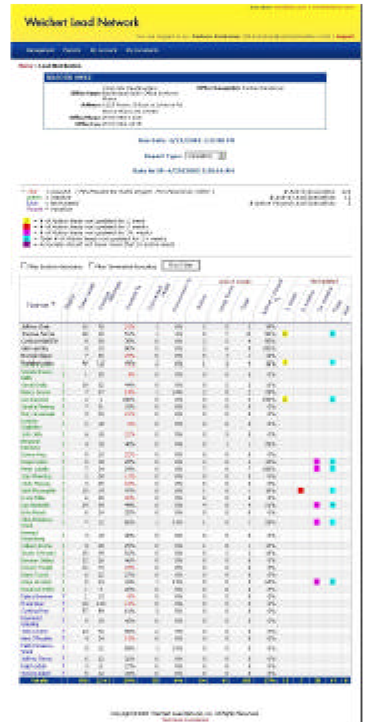


Screen E



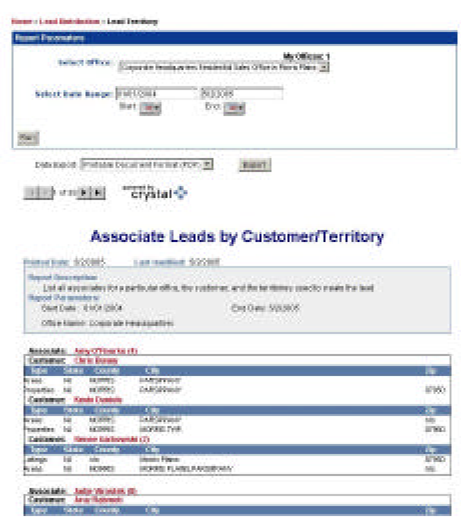
Report - Lead Distribution

All data will be updated once a day.



1. Click on **Reports**
2. Click on **Lead Distribution**

- **Status Column** - The report will list all current and former (inactive and terminated) lead specialists. Names of inactive lead specialists will appear in green and the "Status" column will note an "I" for these Lead Specialists. Names of terminated lead specialists will appear in blue and in the "Status" column will note a "T" for those lead specialists. If you want to collapse all inactive and terminated lead specialists into one row of data, click the "Filter Inactive Associates" box and "Filter Terminated Associates" box and Run the Filter. If a lead specialist is temporarily paused, they will appear in red, and the "Status" column will note "PO" for those lead specialists. Names of lead specialists on Vacation will appear in Purple, and the "Status" column will note an "v" for these associates.
- **Total leads** – The number of leads sent to the lead specialist to date.
- **Contact attempts** – The number of times we've called the lead specialist with a lead opportunity.
- **Contact %** - The percentage of time the lead specialist takes the lead(s) following a call attempt. Since they can take more than one lead on one call, this percentage isn't always the number of leads divided by attempts. The "contact %" will appear in red if it is 50% or less, because we feel that 50% should be the minimum.
- **Converted leads** – The number of leads currently under contract or closed.
- **Conversion %** - Converted leads divided by total leads.
- **Active leads** - Total leads minus closed or in-actives.
- **Active/Closed %** - Active leads plus closed leads divided by total leads.
- **Not updated** – The number delinquent (not updated) leads by the number of weeks delinquent.
- **Max** – A purple box appears if the lead specialist has 15 or more active leads.



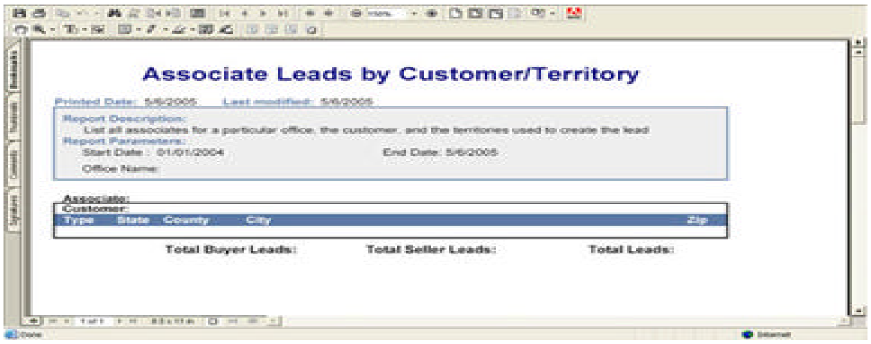
Report - Associate leads by Territory

This report will display all the leads by associate for the office and the territory the Lead was generated for. (Based on the Area or Property the customer was looking for)

1. Click on **Reports**
2. Click on **Associate leads by Territory**
3. **Select Date Range** using the calendar icons.
4. Click **Run.**

To print this Report:

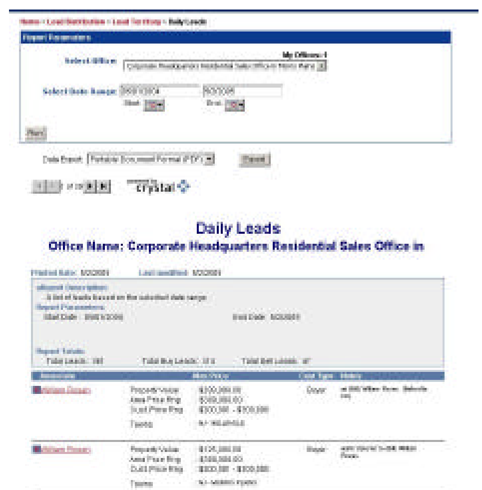
1. Run the report as stated above
2. Click **Export**
3. Click the **print** button on the adobe toolbar.



Report - Daily Leads By Office

This report is a breakdown of all Leads generated for the office with basic lead information.

1. Click on **Reports**
2. Click on **Daily Leads By Office**
3. **Select Date Range** using the calendar icons.
4. Click **Run.**



To print this Report:

4. Run the report as stated above
5. Click **Export**
6. Click the **print** button on the adobe toolbar.

<u>Report - Office leads by Territory</u>

This will display all leads by the office and the territory the Lead was generated for. (Based on the Area or Property the customer was looking for)

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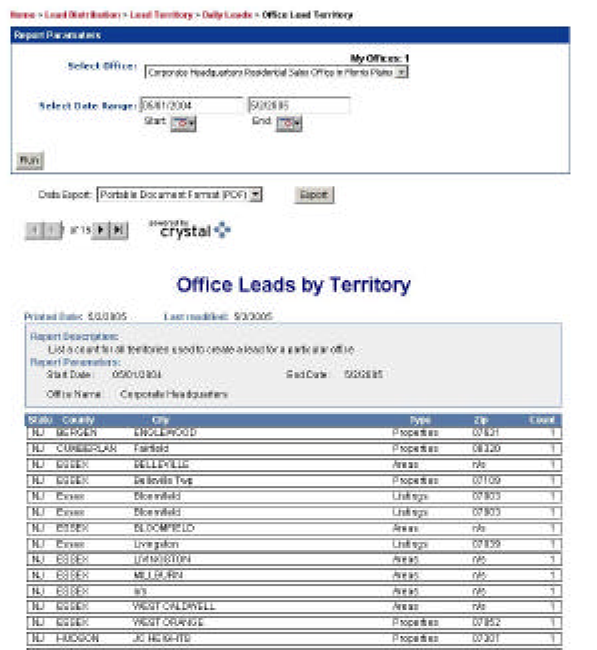
1. Click on **Reports**
2. Click on **Office leads by Territory**
3. **Select Date Range** using the calendar icons.
4. Click **Run.**



To print this Report:

7. Run the report as stated above
8. Click **Export**
9. Click the **print** button on the adobe toolbar.