

**RE/MAX of Western Canada**

# **LeadStreet Broker Guide**

**Ver. 2.0**



## Revision History

<b>Name</b>	<b>Date</b>	<b>Version</b>	<b>Description</b>
<i>Tamika Anglin</i>	<i>09/04/13</i>	<i>1.0</i>	<i>Initial Creation</i>
<i>Tamika Anglin</i>	<i>11/05/13</i>	<i>2.0</i>	<i>Inclusion of instructions on reporting and new listing options</i>

### **Audience and Purpose**

This document is geared towards providing an overview of LeadStreet 2.0 for Broker Owners, Managers, Office Administrators and Power Users affiliated with RE/MAX for the sole purpose of administering the system. It provides an introduction and simplified steps needed to understand and configure LeadStreet 2.0 from a technical perspective. No part of this document may be reproduced or altered without prior written consent from RE/MAX of Western Canada.

This document covers only the sections accessible by the intended audience and does not provide a complete overview of the system, covered in other guides.

### **Disclaimer**

The author shall take no responsibility for the results of any assumptions or deviations from the stated instructions made by the reader.

For support, please contact the RE/MAX of Western Canada Technology Department:

RE/MAX of Western Canada  
#340-1060 Manhattan Drive, Kelowna, BC V1Y 9X9  
Tel: 250-860-3628  
Fax: 250-861-5131  
Email: [technology@remax.ca](mailto:technology@remax.ca)



## Introduction

LeadStreet is the lead management and marketing tool developed by homes.com for RE/MAX. LeadStreet houses agent and office profiles, acts as the CRM database for all users and manages listings and websites:



Figure 1: LeadStreet and Homes.com

## Accessing LeadStreet

- Sign on to LeadStreet via MainStreet



- Go to [www.remax.net](http://www.remax.net) and input your credentials
- Under QuickLinks, select MyLeads
- You will now be presented with a another screen showing your personal account as well as all your offices
- Select the office you would like to configure/administer
- You may or may not be taken to a start up checklist screen depending on your setting

## The Broker Profile

The Broker Profile is similar to the agent profile however, have the following exclusive uses:

- Update a photo for the office website
- Update a personal logo to appear on all agents' websites
- Update the contact information for the office
- Update the office information to affect all agents' profile

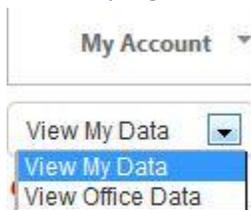
## Switching between your multiple office sites

Once you have signed on to MainStreet and are presented with the multiple offices, the easiest way to switch between your offices is to open each office in a new tab. At this initial screen, right click on each of the office and select "Open in new tab" or "Open in new window" depending on your preferences.

## Switching between your office and personal site

This option only allows you to switch between the office site you are currently logged into and your personal site. To do this, perform the following steps:

- At the top right hand section of the screen, select the arrow next to My Account



**Help**

**Sign Out**

- For office administration, select "View Office Data"
- For personal administration, choose "View My Data"

## Office Settings (Broker Options)

To access the office settings option in LeadStreet, select the arrow next to My Account at the top right hand section of the page, and then select Office Settings.



The office settings option will allow you to:

- **Configure lead management for the office**

As a broker, you have the authority and ability to decide how leads are handled within your offices. You are able to define the number of agents a lead should be sent to or to particular agent. You also have the ability to configure for how long the lead should be with an agent before it expires and also when it should be bounced back to you for manual assignment. We will examine each part of the screen below:

- **Site Lead Distribution Setup**

- **When New Leads Come to The Site Assign Them To:**

- **Assign All Leads to Broker (Except When Listing is Associated With One of your Agents)**
  - All leads will be assigned to you for manual assignment, unless the lead is generated from a listing associated with one of your agents.
- **Assign All Leads to Broker (Regardless of Listing Agent)**
  - All leads will be assigned to you irrespective of whom the listing agent is
- **Lead Acceptance Single Agent (Except When Listing is Associated With One of your Agents)**
  - Leads will be assigned to a single agent, except where the listing is associated to one of your agents, in which case it will be assigned to that agent.
- **Lead Acceptance Single Agent (Regardless of Listing Agent)**
  - Leads will be assigned to a single agent irrespective of whom the listing agent is.
- **Lead Acceptance Multiple Agents (Except When Listing is Associated With One of your Agents)**
  - Lead will be offered to a number of agents in the office except where the lead is generated from a listing belonging to one of your agents, in which case it will be assigned to that agent.
- **Lead Acceptance Multiple Agents (Regardless of Listing Agent)**
  - Lead will be offered to a number of agents in the office irrespective of whom the listing agent is.
- **Choose A Specific Agent**
  - You can determine if you would like all leads to be sent to a particular agent.

- **Apply Round Robin Rules Checkbox**

- A new lead is offered to a randomly chosen agent from a pool. If the agent accepts the lead, that agent is removed from the pool until all other agents



have received a lead, at which point the pool resets. If the agent lets the lead expire, that agent will be taken out of the pool until all other agents have received a lead, at which point the pool resets. If the agent actively declines the lead that agent remains in the pool and is eligible for another random lead.

- **Maximum Time Of Lead Pending For Acceptance**
  - This option determines how long a lead stays with an agent before expiring. The allowable choices range between thirty minutes and eight hours.
- **Number of Expirations Before Assigning To Broker**
  - This option determines how many times a lead must have expired before being passed to the broker for manual assignment. The available choices range between one and three.
- **Maximum Number of Agents To Be Pending For Lead Acceptance**
  - This option is only available when the multiple agents' options are chosen for lead assignment.
- **Only Count Business Hours checkbox**
  - Business hours are defined to be Sunday to Saturday between the hours of 9:00 a.m. and 5:00 p.m. Leads received outside of these hours will not be affected by the **Maximum Time of Lead Pending for Acceptance** option until the defined business hours has started.
- **Lead Notification Options**
  - **When A Lead is Accepted, Expires or Is Declined, Which Email Address Would You like a Notification Sent to?**
    - Input the email address for which you would like to be notified of such an activity. This can be your personal email address or an office administrator's, responsible for the day to day monitoring of the office.
  - **When A Lead Is Accepted, Show Full Lead Details in Notification Email Checkbox**
    - This option ties in with the email option above, and will provide full details of the lead in the notification.
  - **Do Not Send Notifications Emails When Leads Are Accepted By Agents Checkbox**



- This option, once checked will prevent notifications of leads being accepted by agents in your office.
- Send A Summary Email Notification When A Lead is Generated on An Agent Site Checkbox
  - Though this lead did not come through the office site, you will still be notified that the agent has received a lead.
- When Leads Are Generated From The Website, Which Cell Phone or Pager Would You Like Text Alerts Sent To?
  - Please leave this section blank as this functionality only applies to our US counterparts and is not available for us here in Canada.
- **Activate Branding**

Branding allows a broker to relay messages to the agents in his/her office. With this option turned on, the broker can upload an image and a message to the agents which will appear on their dashboard. This can act as internal communication for the office.
- **Manage Agents**

This option allows for you to:

  - Search for an agent assigned to your office
    - Once you have searched for and found an agent, you will be able to:
      - Note their Associate ID
      - Note whether or not they are accepting Leads
      - Note Whether or not they are forwarding their leads to another agent
      - Note whether or not they have been assigned a seat and add or remove seats as needed. **Note that this seats option is not available for our agents in Western Canada**, and would refer to the number of agents who are provided with access to the Dashboard.
    - Edit the Agent's profile
      - Once you have selected to edit an agent's profile, you will be taken into his/her profile page as if he/she had signed into his/her account. From here you are able to:
        - Update the agent's title
        - Update the agent's IDX code



- This is the agent's Real Estate code, unique to the agent, and used at the real estate board whenever the agent uploads a listing. This allows for the listing to be associated to the agent in LeadStreet and on all RE/MAX websites.
- Update any contact numbers, email addresses and website URL
- Forward the agent's lead to another agent
- Add/Remove the agent's ability to accept leads

## Manage Listings

To access the Listings section of LeadStreet, at the top left hand corner of the screen, select the white drop down arrow next to the HomesConnect icon as seen below, then select Listings.



The Listings section of LeadStreet allows you to exclusively:

- Access the MLS Resource Center
  - Every office is pre-configured with the required data feeds which have the listings uploaded to each of the different real estate boards. If there are additional boards for which agents are uploading listings, then this will need to be added to your office setup via this section.
    - Before doing this, it is a good idea to check the preset Listing Sources configured for your office (To be discussed in a later section)
    - To apply for additional data feeds, select IDX-SELECT next to the name of the MLS. You will then be emailed an application form for completion and submission to Homes.com for approval and processing.
  - Track your IDX Order

After you have successfully applied for new data feeds, you can track the progress of this application in this section.
- Cities Setup
  - In order for the addresses of your agents' listings to be complete, the correct cities must be updated in the system. Please note this option only refers to manual listing uploads, as those from the data feeds will be complete. From here, you have the ability to:



- Add New City
  - Select Add New City
  - Input the name of the city to be included along with the corresponding Province
- Remove All Cities
  - Remove all cities currently in the system
- Import Cities from MLS
  - Allows you to Import the cities currently uploaded with the listings at the MLS
- Property Types Setup
  - This option will determine the different property types for which a client can filter by on your office or agents' websites.
    - To add a new property type, select Add New Property Type at the top of this page
      - Choose from the list of available property types at the drop down menu entitled Auction Item
      - Input the name to be displayed on the website
      - Select the group this category would fall under: Residential, Commercial or Both
      - Under actions, select the checkbox to add this property type
      - This property type is now added to the list of available property types for filter searches.
    - To remove a property type, select Property Types Setup, then select the  next to the Property Type to be removed
    - To edit a property type, select the  next to the Property Type to be edited. This will allow you to update the Display Name as well as the group this type should be categorized under.
- Listing Source Setup
  - To check which data feeds are currently in your office, select the Listing Source Setup option from within Listings
    - MLS
      - Name of Real Estate Board from which listings are being sent to your office
      - You will either see one or more, depending on the Real Estate Boards you and your agents are a member of



- Listing Source
  - Location of the MLS and the LSID for that Real Estate Board
- Last Update
  - The last date and time listings were synced between this office and the Real Estate Board via this specific data feed.
- # Listings
  - The number of listings in the data feed. Please note these would also include non-RE/MAX IDX listings
- IDX Code
  - Broker Code under which this feed is applied
- Source Homes.com Listings checkbox
  - A check in this box shows that all listings for the office will be synced on homes.com via this data feed.
- When Listings are imported, would you like to automatically link listings for your agents?
  - No – Do Not Automatically Link Listings During Import
    - Listings will not be linked to agents
  - Yes – Automatically Link Listings to Agents During Import (Preferred option)
    - Listings will be linked to the individual agents, who will also have access to them via their LeadStreet account.
- RE/MAX Collection (Luxury Properties)
  - Properties meeting stipulated values in particular areas as predetermined by RE/MAX is automatically tagged as RE/MAX Collection properties and will appear accordingly on remax-western.ca, remax.ca and at theremaxcollection.ca.
  - Properties outside of the stipulated values, yet meeting certain features which can be classified as a collection property, can be manually tagged by the broker to appear on the aforementioned websites.
    - Go to listings and locate the property to be tagged as a collection property
    - Next to the property, under **Select An Action**, choose **Edit Details**



- Under General Listing Information, select the checkbox next to RE/MAX Collection

Subdivision:	Area:	Service Level:
<input type="text"/>	<input type="text" value="Starland"/>	<input type="text"/>
Date Expires:	Date Sold:	<input checked="" type="checkbox"/> RE/MAX Collection
<input type="text"/>	<input type="text"/>	

- Choose Save Listing at the top right section of the page
- Listing Features
  - This option allows for different features to be setup to be used on a listing
  - To add a new feature:
    - Select **Add New Feature**
    - Input a name for the feature
    - Select the category from the drop down list of available features
    - Place a check in the box next to the checkbox under Show to have it appear under the features on a listing
    - Select the check to save the listing
  - Edit a listing to use the newly created feature
    - Locate listing and choose **Edit Details**
    - Under the **Advanced** Tab, scroll to listing features
    - Choose **Add/Modify Features**
    - Highlight the feature(s) to be used
    - Select **Add Feature**
    - Choose **Save Features** at the top of the dialogue box
  - To delete a feature, select **Listing Features**
  - Select the thrash icon next to the feature to be deleted
  - Select OK at the message from webpage dialogue box



## Business Intelligence Reporting

Outside of the regular reports afforded to all agents, brokers are equipped with the following two reports to assist with the daily operations and to monitor the lead assignments:

- Lead Flow Log
  - This report shows for each lead, the agents it was offered to, the number of times offered, and the agent accepting it. The report is grouped based on the LeadID (every lead is given a unique ID number for tracking purposes).
  - The report also provides the following information:
    - LeadName – Name of the client generating the lead
    - LeadSource – Where the lead was generated
    - Listing – Address of the property
    - MLSNumber – Property MLS
  - The report can be printed or exported to a PDF file for distribution
    - To save, select the  and choose the file format to save the report
    - To print, select the  icon at the top of the report, choose your printer and any required print options and select OK
- Lead Acceptance By Agent
  - This report gives a breakdown of the number of leads offered or assigned to an agent and the number accepted, expired or declined. It also gives a rating based on the agent's acceptance percentage.
  - As with the report above, the report can be saved or printed as needed.