LeadRouter™

The Right Agent... Right NOW!

Using LeadRouter 3.0

Using Lead Router

What is LeadRouter

Lead Router is a unique system that captures leads and converts them into a voice call that immediately routes to your cell phone and “reads” the lead out loud using text speech technology. Once you listen to and accept the lead, Lead Router records that lead in the Agent’s Personal Lead Management System where you can incubate it using online follow up tools.

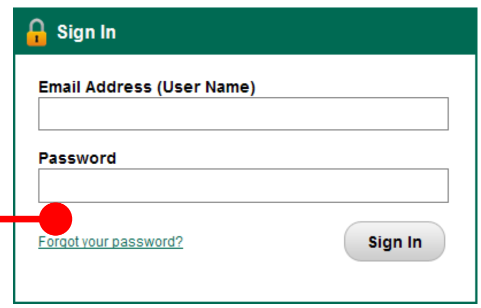
The ability to receive the lead details immediately without having to check email allows you to respond rapidly and increase your odds of turning the lead into a sale!

Lead Router captures leads from many sources including Coldwell Banker web sites, Realtor.com, additional third party websites and personal web pages.

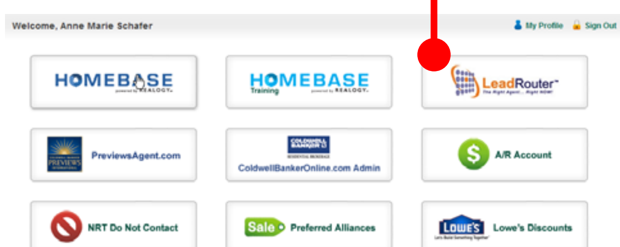
Note: Lead Router is compatible with Internet Explorer and Firefox only.

Accessing LeadRouter

1. Go to CBResource Center
2. Click on **Local Site Admin/LeadRouter** in the **Quick Nav**.
3. Login using your cbexchange.com email and password.
   Note: If you using LeadRouter for the first time click on **Forgot your password** and follow the steps.
4. Click on the **LeadRouter** Button.



Pop-up Blocker: Internet Explorer will have a security warning window. Click **Yes** to grant access. Firefox will have no pop-up by adding the NRT intranet site to the allowed sites.

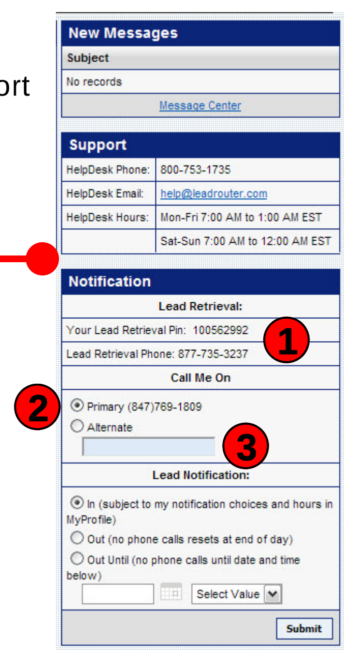


Toolbar: If an extra toolbar that has been installed (i.e. google, yahoo, aol) it may cause the NRT Intranet site to not open. You may have to uninstall the toolbar.

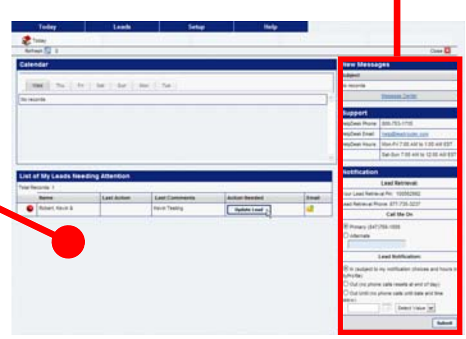
Using Lead Router

The main screen will show your Calendar, List of Leads, New Messages, Support Numbers, and Notifications.

1. The first time you need to retrieve a lead – call this number 877-735-3237 and enter your pin#
2. Primary number is always your cell phone number.
3. Add an Alternate Phone Number.



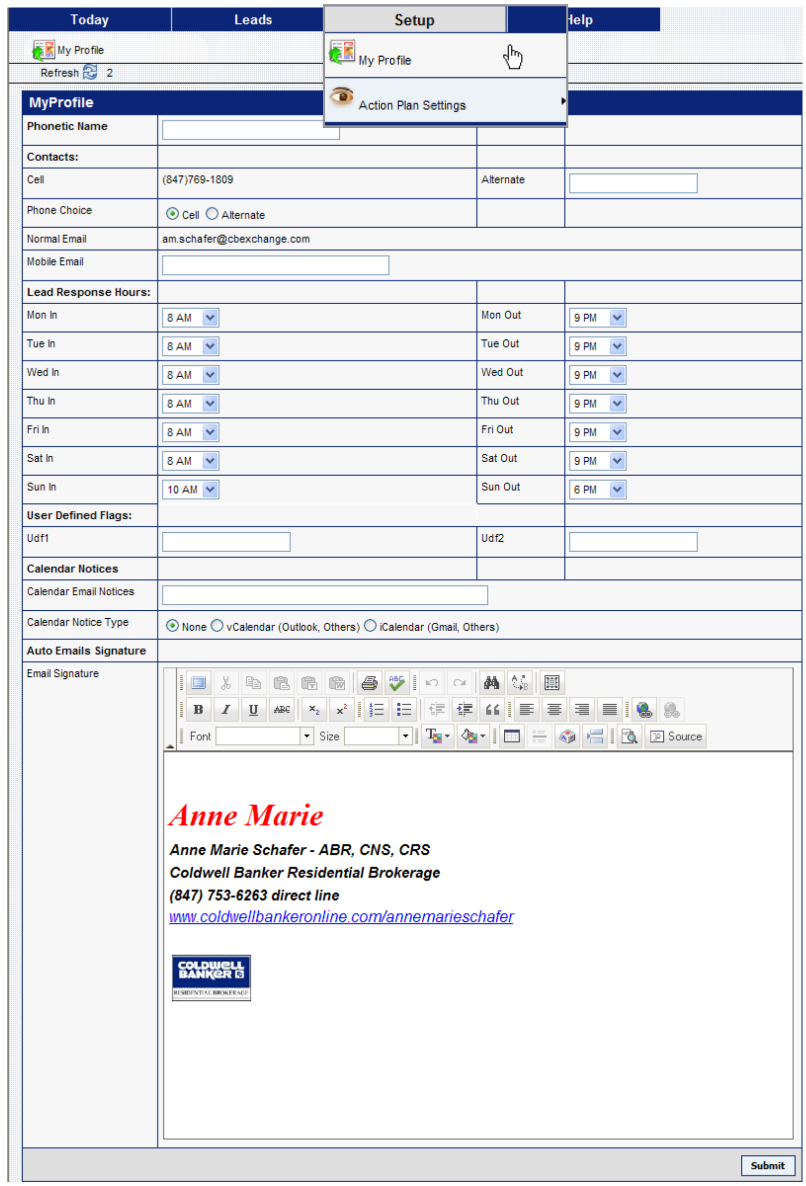
This box shows the **List of My Leads Needing Attention box.**
To update a Lead to go page 6.



Accessing your Profile Page

My Profile Page

Primary Cell: Phone number LeadRouter calls with new leads; This can only be changed by your Administrator.
Alternate Cell (Cell2): A replacement number users can switch to. When activated, the system will call this number INSTEAD OF your primary cell phone.
Normal Email: Your CBExchange email will get a copy of accepted leads.
Mobile Email: Receive "second" copy of accepted leads or notification of compliance.
Lead Response Hours: Default business hours are: M-Sat 8:00am to 9:00pm, Sun 10:00am to 6:00pm. Your hours can be customized and your phone will not ring after hours!
eMail Signature: Enter you signature as it shows in your CBExchange email. It Does not have our material for the Outgoing Referral.
***My LeadRouter Mobile Profile*:** The link is at the bottom of the profile page. Go to page 4 to setup you mobile profile.



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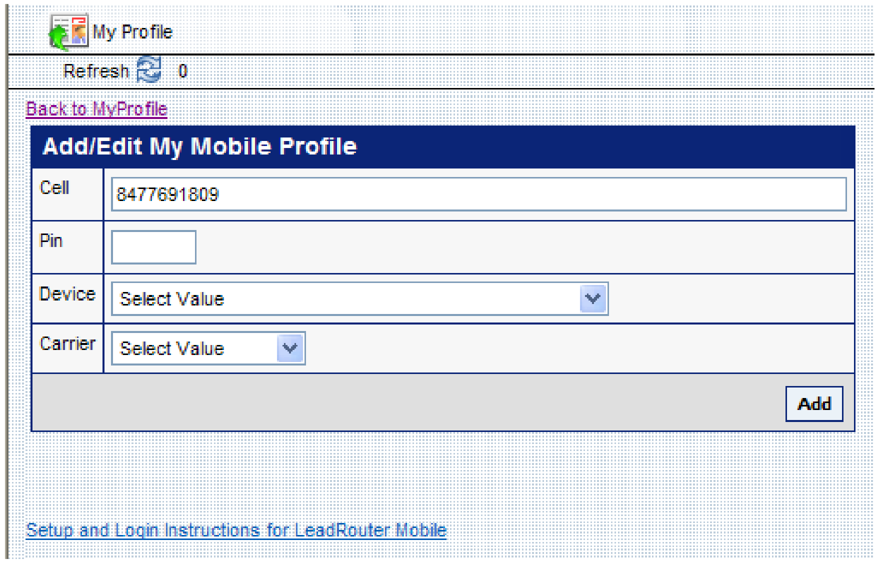
Profile Page Continued...

LeadRouter Mobile

By setting up LeadRouter for your mobile device. You can access and update Leads.



Setup Instructions for LeadRouter Mobile

1. Click on "**My LeadRouter Mobile Profile**" link (you will be directed to "**Add/Edit My Mobile Profile**".)
2. Select a 4 digit PIN Number (e.g. 1234 or last 4 digits of cell phone number.)
3. Enter Device Make and Model (e.g. Blackberry 8703e.)
4. Enter Carrier (e.g. Verizon) the click **Add**.

Login Instructions for Accessing LeadRouter Mobile

1. Open a web/internet browser on your mobile device (Refer to your user manual for your mobile device on accessing web/internet browser.)
2. Enter the following URL in the address bar: http://m.leadrouter.com (you will be directed to the LeadRouter Mobile Login Screen.)
3. Enter Cell Phone Number (digits only e.g. 2012345678) and 4 digit PIN number then select **login**.

Update a Lead with your Mobile Device

The first screen gives you different options:
[Home] – Brings you back to this screen
[Leads] – Lets you update the leads you currently have
[Logout] – Logout of the system when you are done.

Note: When you are not available you can set the Notification to "Out Today". On the BlackBerry you will need to scroll down to see this option.

1. From the main screen click on **[Leads]**
2. The next screen will list your leads. Your leads are displayed by category. Leads that request your attention are displayed with the date in **Red.**
3. To update a lead, click on the Lead under "Name". After clicking on the Name of the Lead, click on the "New Action" down arrow to display the list of Action options.
4. Finally, click inside the "New Action Comments" text box to add your comments.
5. When completed click on **[Update]**. You may need to scroll down the screen to see the update button.

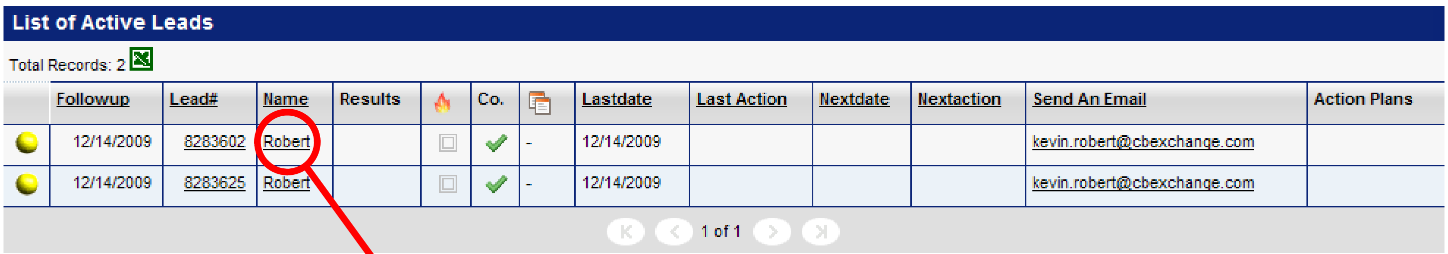
Add LeadRouter™ Mobile to your Favorite/Bookmark

Access the LeadRouter™ Mobile site easily. The User ID will automatically populate (you only need to enter your password)

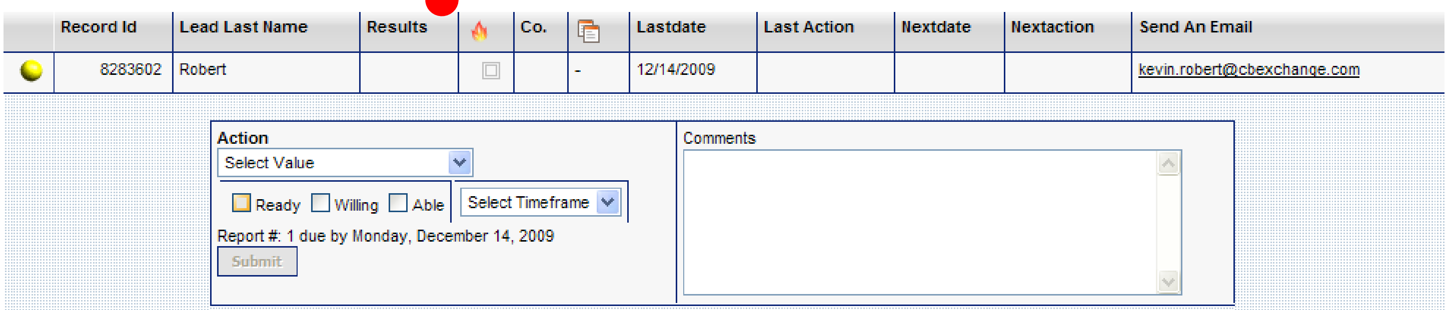
1. **IMPORTANT –** Use the following for the Address
   http://mobile.nrtinc.com/login.aspx?UserID=your email here
   sample of **your email here** john.smith@cbexchange.com.
2. Save to your Favorites in your mobile device.

Access your List of Active Leads & Lead Details

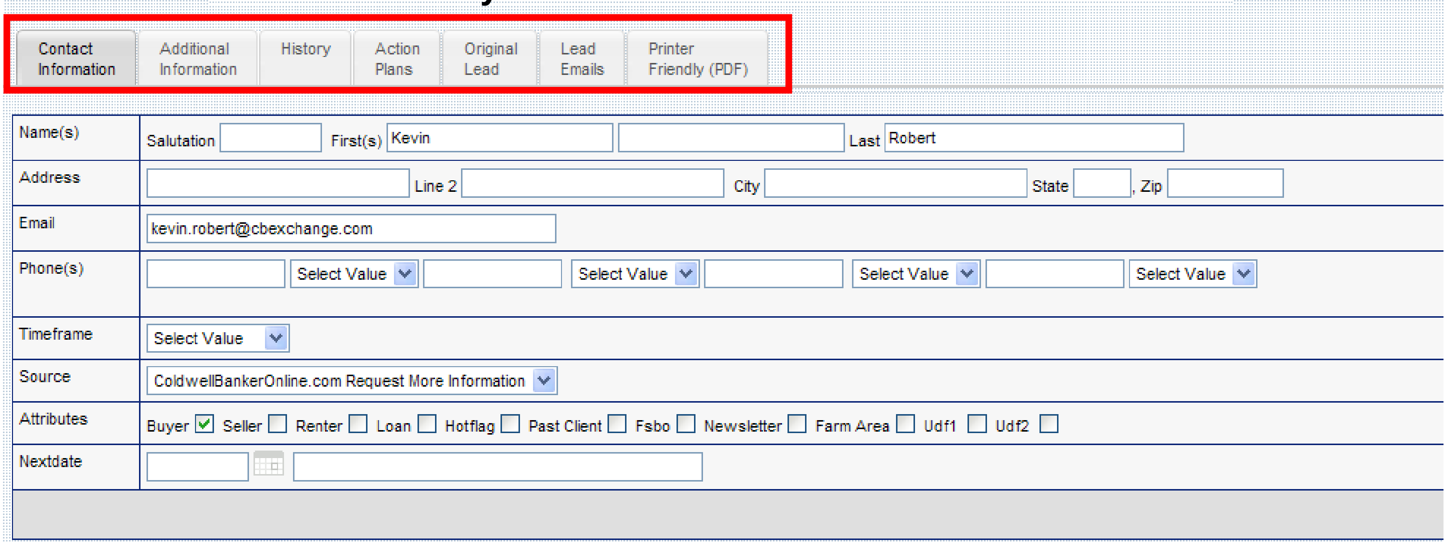
1. Select **Leads** >> **My Leads** in the menu bar above.
2. Click on the **Name** of the lead to access all details.



Lead with Details



Lead Information reference key below



Contact Information – View client contact information captured by LeadRouter.

Additional Information - e.g. address and phone number to centralize.

History – Stores all Agent updates and shows a history of comments.

Action plans - Are automated follow-up/event plans to keep in touch with leads.

Original Email – Displays original client email from the web.

Lead Email – Displays additional emails related to this lead.

Printer Friendly (PDF) - Displays entire Lead in PDF format. You can print and/or save the entire lead.

How To update a Lead.

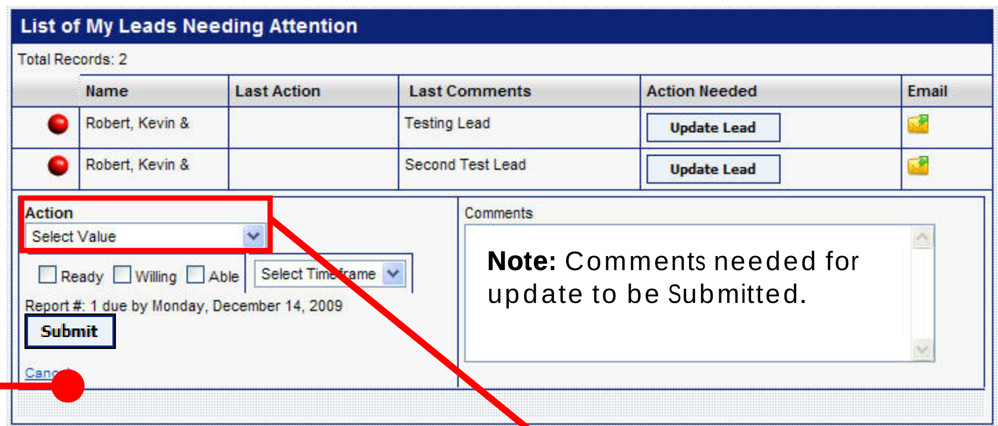
LeadRouter requests the agent to follow a system of "reporting stages" to update the lead in a timely and consistent manner.

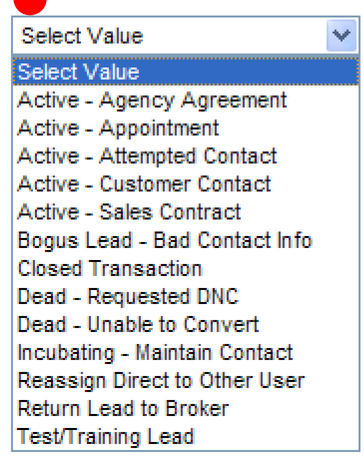
Lead Status Colors

All leads have a **"Lead Status Light"** that quickly displays their compliance with company reporting rules.

- **GREEN LIGHT STATUS** - Lead is in compliance with required update timelines.
- **YELLOW LIGHT STATUS** - Lead needs to be updated within 24 hrs.
- **RED LIGHT STATUS** - Lead is out of compliance with required update timelines.

1. Click on **Update Lead**.
2. Click the **Action** list to select a category most similar to the action taken for the new lead.
3. Enter **Comments** in the space provided (up to 255 characters)
4. Click **Submit** to update your lead.





Active- Agency Agreement: use this selection to indicate you have signed an agency agreement. Write details in comments. *Active Status.*
Active - Appointment: use to indicate appointments made/kept with consumer. Write comments in details. *Maintains Active Status.*
Active - Attempted Contact: use to indicate any kind of "attempted contact with consumer" such as leaving a message, sending follow up email, etc. Write details in comments area. *Maintains Active Status.*
Active - Customer Contact: use to indicate any kind of "successfully contacted consumer" activity such as spoke on telephone, met at office. Write details in comments area. *Maintains Active Status.*
Active – Sales Contract: use to indicate you have entered into a purchase/sales contract with this consumer.
Bogus Lead – Bad Contact Info: use to indicate you received a lead with erroneous contact data, such as "Mickey Mouse" and there is no way to contact the consumer; **Do not use to indicate you felt the lead you got was bad/unfair.** Transfers lead to Administrator.
Closed Transaction: use to indicate the consumer has completed a **purchase/sale transaction**. Write details in comments. Transfers *contact to Closed Status.*
Incubating by Maintaining Contact: use to indicate you are maintaining regular contact with consumer. Write details in comments. Transfers *Lead to Incubating Table and maintains follow up requirements.*
Dead – Requested DNC: use to indicate you contacted the consumer and they requested to be added to Coldwell Bankers Do Not Call list and not contacted further.
Continued…

Actions pull-down menu continued

Dead Lead: Don't Consider a Lead Dead Unless: The Consumer requested no contact. Multiple contact attempts including e-mails and voicemails over a 3+ week period.
Reassign Direct to Other User: If you are working with a lead that arrived as an inquiry of your own listing, you can transfer the lead to another agent.
Return Lead to Broker: use to return a lead to Coldwell Banker or Administrator if you are not able to assist the consumer. Example: Consumer requires expertise for which you are not qualified.
Test/Training Lead: use to clear a lead you were "practicing" with in order to get familiar with the system, or used when demonstrating LeadRouter to a prospect and generating a lead for yourself.

Important Phone Numbers

Lead Router:	**877.735.3237**
Lead Router Help Desk:	**800.753.1735**
NRT Help Desk:	***877.NRT.HELP***
	877.678.4357

Enter these in your cell phone!

Tip: Have a specific ringtone for the LeadRouter number.