LeadRouter™

Agent Guide

LeadRouter Customer Service
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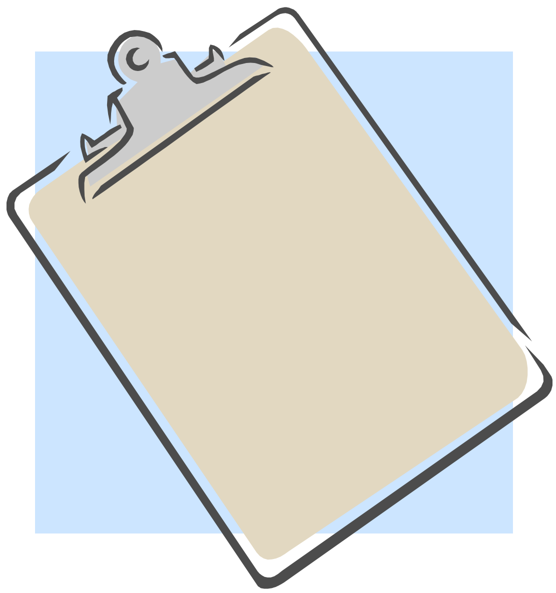
M-F: 7:00AM – 1:00AM ET
Weekends: 7:00 AM – 12:00AM ET

Version 1.4 | May 2012

Contents



Chapter 1:

Overview

What is LeadRouter?

- **LeadRouter is a unique lead distribution and lead management system** that captures internet leads, converts them into a voice call, routes it to your cell phone and provides online follow-up tools. LeadRouter captures leads from many internet websites, including your brand website, company websites, Realtor.com, and more. It even handles manually entered leads from call-ins and walk-ins. Consumers simply inquire from the web and LeadRouter takes over to get the lead to you anywhere, anytime, directly on your cell phone!

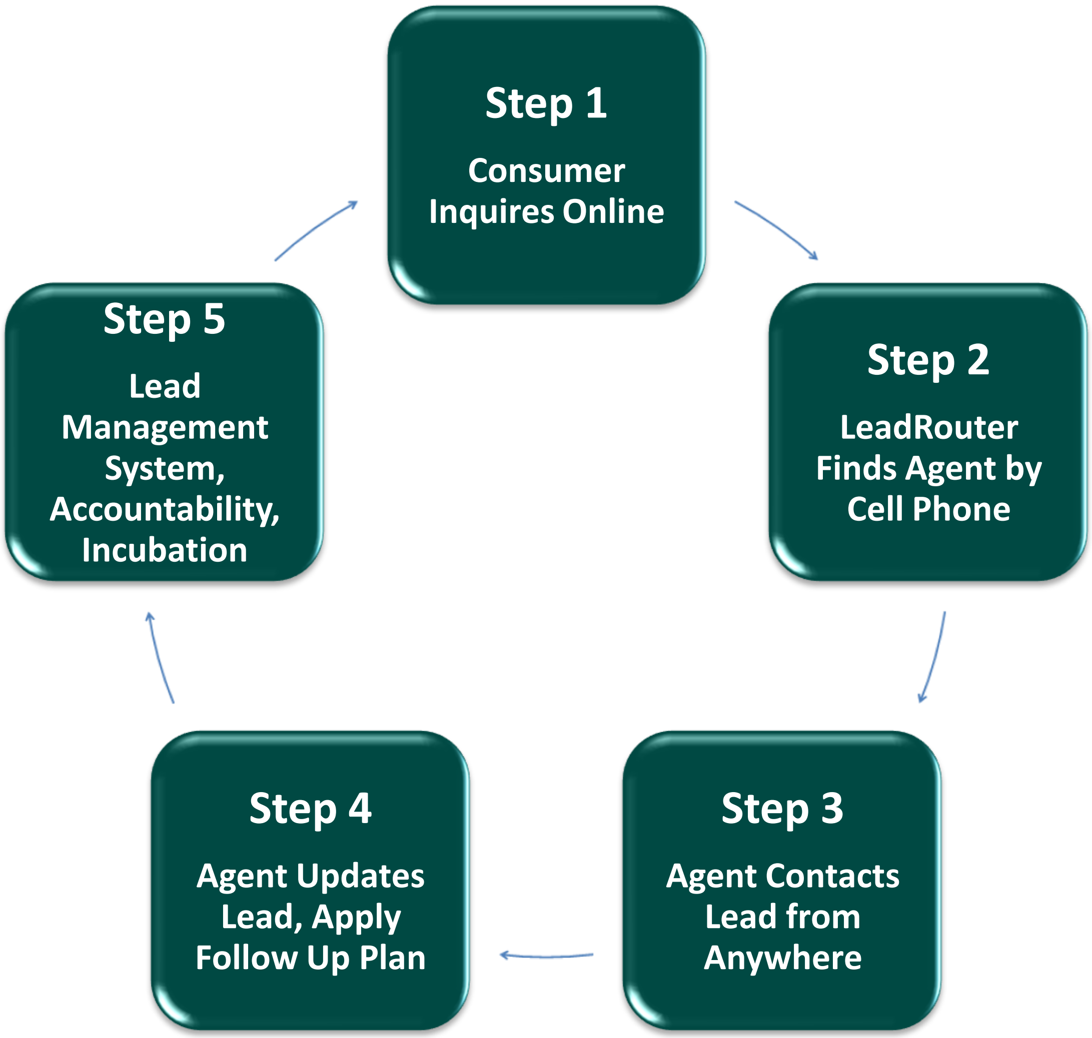
- **LeadRouter uses a special "matching" system to match leads with the right agents.** It can match listing leads with the listing agent or find a Spanish-speaking agent for a Spanish-speaking consumer - according to each agent's skill assignments and rules established by your company.

- **LeadRouter calls you on your cell phone and "reads" the lead out loud, using state of the art text-to-speech technology.** Agents "accept" leads on their cell phone and are then provided all of the client's contact info by phone, email, and text. The agent can then contact the consumer right away!

- **LeadRouter requires the agent to follow a system of "reporting intervals" to update the lead in a timely and consistent manner.** After accepting the lead, LeadRouter records that lead in the Agent's personal account where they update the lead periodically with what is happening with their lead. This allows the agent to receive future lead offers, incubate leads, and provide excellent customer service as leads will never fall through the cracks.

- **Throughout the process, the agent can apply Follow Up Plans to leads, access their lead account via mobile devices, import personal leads, and run productivity reports.** Follow Up Plans allow the agent to incubate and keep in touch with clients through the use of auto emails, calendar reminders, and print pieces. On the go? Access your leads on your mobile device using the mobile website or the iPhone app. Importing personal leads ensure the agent has all of their lead contacts in one central system to stay organized. At any time, the agent can run reports to measure conversion rates, estimated lead value, and timeframe pipelines.

The LeadRouter Approach



Accepting Leads

LeadRouter will offer leads to you on your cell phone.

The system will always offer the leads from the following phone number:

970-660-5323

Tip: Consider adding this number as a contact in your cell phone and setting a unique ringtone to pay special attention to calls from this number.

Lead Acceptance Phone Prompts

Step	Result
"If this is not voicemail, **press 1**"	• **Press 1** if you are answering call, Lead Offer Continues… • If 1 is not pressed, lead offer goes to Voicemail*
Call provides **Preview** of lead offer	Agent hears Source, Area, Price of lead offer
To **Accept** lead, **press 1**	• **Press 1** to **Accept** lead offer • **Press 9** or **Hang Up** to **Reject** lead offer
If Accepted, Call Provides Client Info	Client info is read over phone call and emailed to agent's email address
Post Acceptance Keypad Prompts	**Press 1**: Repeat lead info ***Press 2**:* Client info is sent via **TEXT** message to agent's cell phone number **(Optional)** **Press 3**: Spell customer's name **Press 4**: Repeat client info

*** Voicemail Claim Time:** The timeframe the agent has to retrieve a lead if the lead offer is missed. If the lead offer is missed, LeadRouter will attempt the following:

1. Leave a **voicemail** on the agent's telephone
2. Send an **email** to the agent's primary email address
3. Send a **text** to the agent's telephone******

The agent can **call back, reply to the email, or reply to the text** to accept the lead.

******In order to **accept via text**, the agent **MUST** have the **"Accept SMS Messages"** setting in the "**Profile"** set to **"YES"**. If **replying via text to accept**, agent **must type "YES"** in the text message sent back to LeadRouter.

*Please note that this is an **OPTIONAL** setting enabled by your company's Broker. Not all companies will use Voicemail Claim Times. If your company is not using Voicemail Claim Times and you miss an offer, you miss the lead with no option to retrieve it before it moves on to the next agent in rotation.*

Accessing LeadRouter

There are **three** methods to access the LeadRouter system:

Access Method	Instructions
Computer  **1. Brand Intranet Website** *(Accessible on All Computers such as Desktop, Laptop, Mac, iPad, etc.)*	Login to your Brand Intranet website and locate the LeadRouter link. When link is clicked, you are automatically logged into LeadRouter
Cell Phone  **2. LeadRouter Mobile Website** *(Accessible on All Cell Phones with Internet Access such as Android, Blackberry, iPhone, etc.)*	Use your cell phone internet browser to navigate to: https://mobile.leadrouter.com • **Username:** Primary Email Address • **Password:** Mobile PIN (Username and Password Set in LeadRouter Profile via method 1)
Cell Phone  **3. LeadRouter iPhone App** *(App **ONLY** available on **iPhone**)*	Download the free "LeadRouter Mobile" App via the iPhone App Store • **Username:** Primary Email Address • **Password:** Mobile PIN (Username and Password Set in LeadRouter Profile via method 1)

Navigating LeadRouter

Top Menu

The top horizontal menu is the main navigational element. When the mouse hovers over a particular item, the submenu is automatically displayed without clicking. Both main menu and submenu items are clickable and will cause a page change.

Header Links

Above the horizontal menu, the following links are displayed.

- **Calendar**: Navigates to the Calendar
- **Profile**: Navigates to the Agent's Profile
- **Customer Support**: Navigates to the Customer Support Page
- **Logout**: Agent is logged out of LeadRouter

Search Leads

Use the **"Search Leads"** keyword box to search for leads by name, phone number, email address, or Lead ID.

Sub-Header Links

The following elements will be present just below the main page header based on the page that you are viewing

- **Export As Excel**: Exports current list info to excel spreadsheet. Only appears if data is in tabular format such as viewing leads or reports
- **Download PDF**: Saves Current Page as a PDF document
- **Print**: Prints Current Page
- **Save as Favorite**: Saves the Current Page to the Agent's Favorites List
- **View Favorites**: Displays the Agent's Favorites List

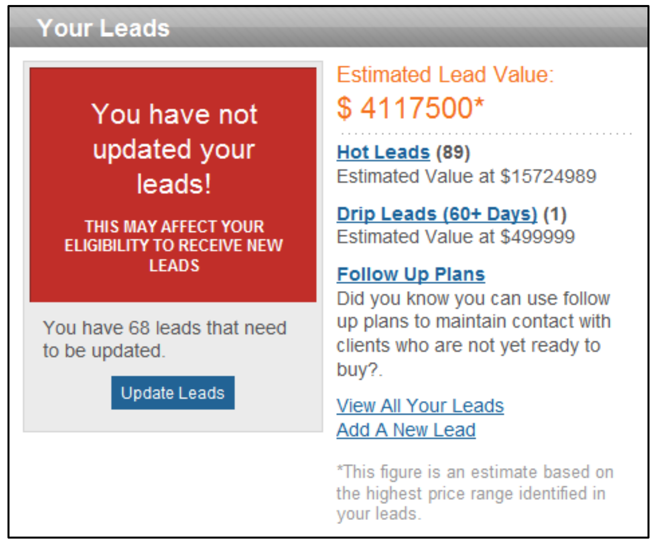
Chapter 2:
Home

Home Page

The home page of LeadRouter contains a quick overview of the agent's current status as well as many shortcuts to common tasks that can be performed.

The key sections of the agent's Home page include:

- Your Leads
- Your Stats
- Calendar
- Lead Notification
- Update Your Leads



Your Leads

This section contains a status box that indicates if the agent's leads are up to date and if the agent is eligible to receive new lead offers.

The box at anytime can be one of the following colors:

- **Green** (Leads are Up to Date, Eligible for New Leads)
- **Yellow** (One or More Leads Needs to be Updated within 24 hours, Eligible for New Leads)
- **Red** (Lead Updates have been Missed, Not Eligible for New Leads)

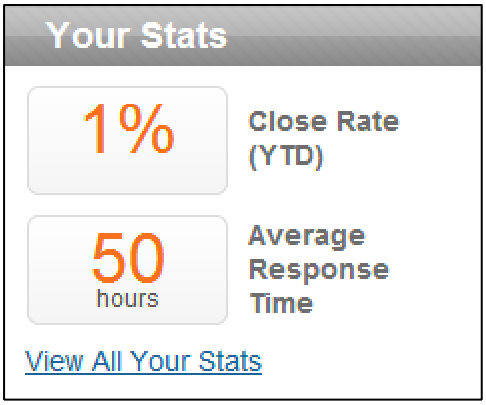
All leads assigned to the agent that require updates will also have a status light associated with each lead so the agent can easily determine if an update is due by viewing that lead.

This menu also contains clickable links to access various areas of LeadRouter:

- **Hot Leads:** *View All Hot Leads **(Short Term Clients)***
- **Drip Leads (60+ Days):** *View All Drip Leads **(Long Term Clients)***
- **Follow Up Plans:** *View, Edit, and Add Follow Up Plans in System*
- **View All Your Leads:** *View All Leads Assigned to the Agent*
- **Add a New Lead:** *Add a Personal Lead to LeadRouter*

Your Stats

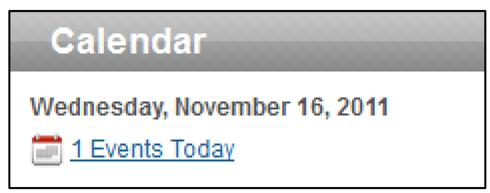
The **"Your Stats"** section contains a quick peek at two key statistics for the agent and a link to view all statistics in the system for the agent. The "Default" date range for the stats is "Year to Date" or "YTD". These stats do **NOT** include personal leads for the agent.



- **Close Rate (YTD)**
  - Percentage of all leads converted into a closed transaction in LeadRouter
- **Average Response Time (YTD)**
  - Average time in hours it takes for the agent to accept a lead and then update the lead for the first time in LeadRouter

Calendar

The **"Calendar"** section contains a quick link to view the LeadRouter Calendar.

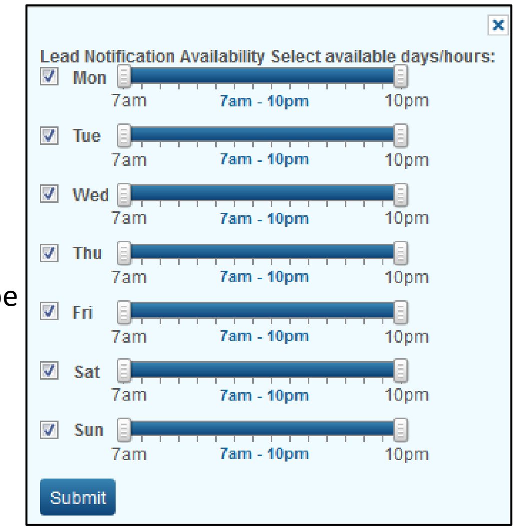


Lead Notification

The **"Lead Notification"** section is a quick way to adjust your **"Availability"** for leads. Availability indicates if you are available for lead offers or not. Agents can also change the contact phone number that LeadRouter uses to offer leads.

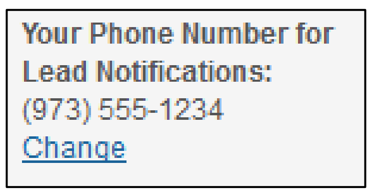
To set your availability for new lead offers you can quickly click the **"Available" or "Unavailable"** buttons. If **"Unavailable"** is chosen, the agent will not be offered leads until the agent changes the setting back to **"Available".**

Lead Notification, continued



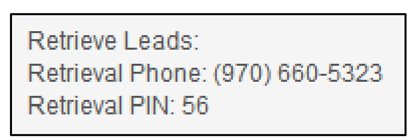
If you choose to permanently adjust your available hours, click the **"Change Hours Available"** link. This will open a pop out that you can adjust individual hours for each day by adjusting the sliders. If you want to be not available for a specific day of the week, uncheck the day and click **"Submit".**

To change the phone number that LeadRouter offers you leads on, click the **"Change"** link under the **"Your Phone Number for Lead Notifications"** item. This will jump you to your profile where you can adjust the telephone number LeadRouter calls you on to accept leads.



The **"Retrieve Leads"** area contains the "**Retrieval Phone"**. This is the number that LeadRouter calls from to offer you leads. The phone number is: **970-660-5323**. *Consider programming this number into your cell phone to easily recognize when LeadRouter is calling you.*

The "**Retrieval PIN"** is listed here and is your **CREST ID number**. You would use this number to **call LeadRouter back to accept leads if ALL of the following apply**:



- Your company is using a voicemail claim time **AND**
- You miss an offer, **AND**
- You are calling back from a different number than what LeadRouter called you on
  Example: *LeadRouter called you on your cell, but you are calling back from your home phone number, you would need to enter your PIN to accept the lead.*

  Typically, if you call back from the same number you missed the call on, LeadRouter knows who you are from Caller ID and you do not need to enter the PIN.

Update Your Leads

Use this table to quickly identify leads that are missing a required update. This list will include leads that are:

- **Red** (Missed Updates)
- **Yellow** (Updates Due within 24 hours)

Update Your Leads

1 to 4 of 4 Records

Date Entered	Lead Update	Update Due	Lead Name	Status	
08/31/07 10:50	●	Due 1 days ago	Jason Test	Hot Prospect	Update
12/04/09 09:00	●	Due 1 days ago	Donald Miller	Hot Prospect	Update
12/10/10 11:48	●	Due 1 days ago	James Smith	Hot Prospect	Update

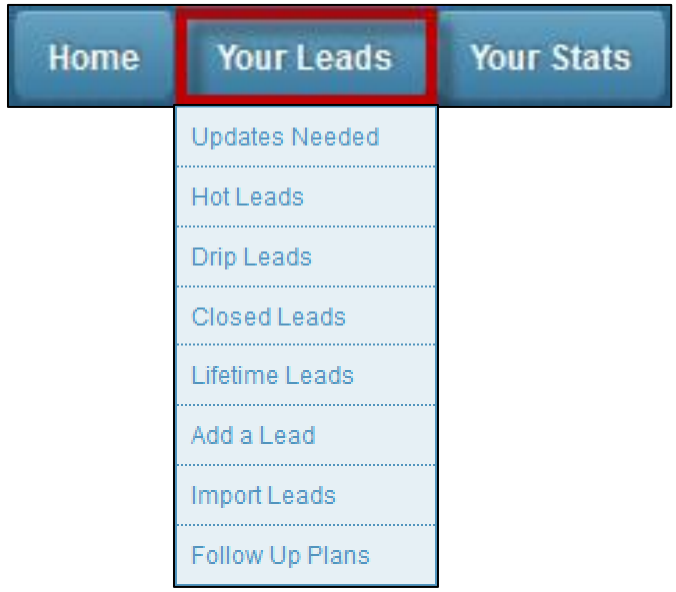
To update your leads here: click the **"Update"** link to the right of the lead. Once the leads are updated, they are removed from this table, showing only leads still requiring an update.

Tip: *For more info on updating leads see "Updating Leads" on page 21*

Chapter 3:
Your Leads

Your Leads

To access your leads in LeadRouter, click the **"Your Leads"** menu item located in the top navigation menu.



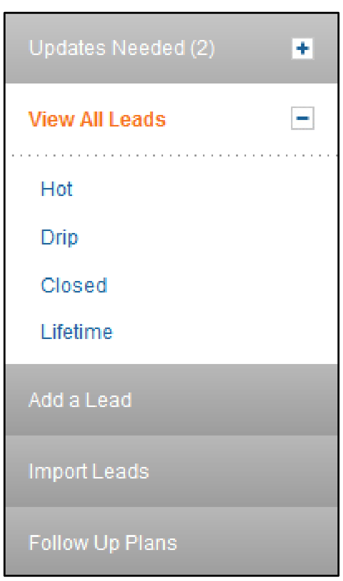
This chapter will cover the following:

- View Leads
- Update Leads
- Add a Lead
- Import Leads

View Leads

The **"Your Leads"** menu offers **two** different ways to view your leads in LeadRouter.

The **first way** is to use the dropdown menu that appears when you hover over the **"Your Leads"** menu at the top as seen in the above image.



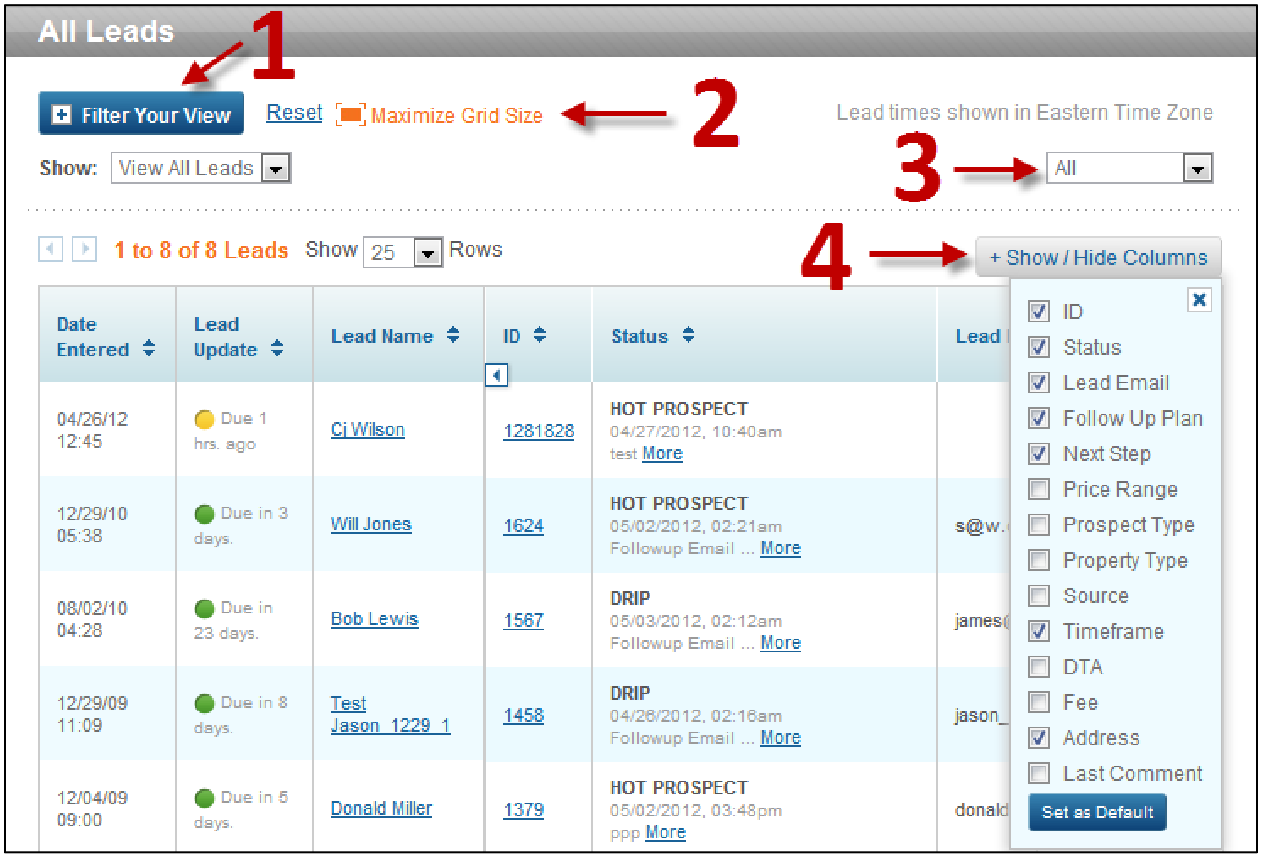
The **second way** is to click the **"Your Leads"** menu item at the top and then use the menu on the left hand side of the system.

Both of the menus contain links to view leads based on the following preset searches:

- Updates Needed
- View All Leads
- Hot
- Drip
- Closed
- Lifetime

Lead View	Description
Updates Needed	Leads that the agent **MUST** update to remain eligible for new leads, Includes Red and Yellow leads
View All Leads	Shows **ALL** leads in agent's account
Hot (Short Term)	All Buyer, Seller and Renter leads that the agent is actively pursuing and looking to move in the next few months. Includes appointments, representation agreements, and sales contracts
Drip (Long Term)	All Buyer, Seller, and Renter leads that are long term in the timeframe the client is looking to move. These are also leads that may not be responding as frequently to the agent but the agent still wishes to pursue and incubate.
Closed	Closed Transactions, these would include buyer, seller, and renter transactions
Lifetime	Clients that are closed and the agent would like to keep in touch post sale with client to create a "Customer for Life", Sphere of Influence leads

When any of the lead views are selected the leads appear in the middle of the page and look like this:



1. **Filter Your View:** Allows the agent to perform custom lead searches in the system

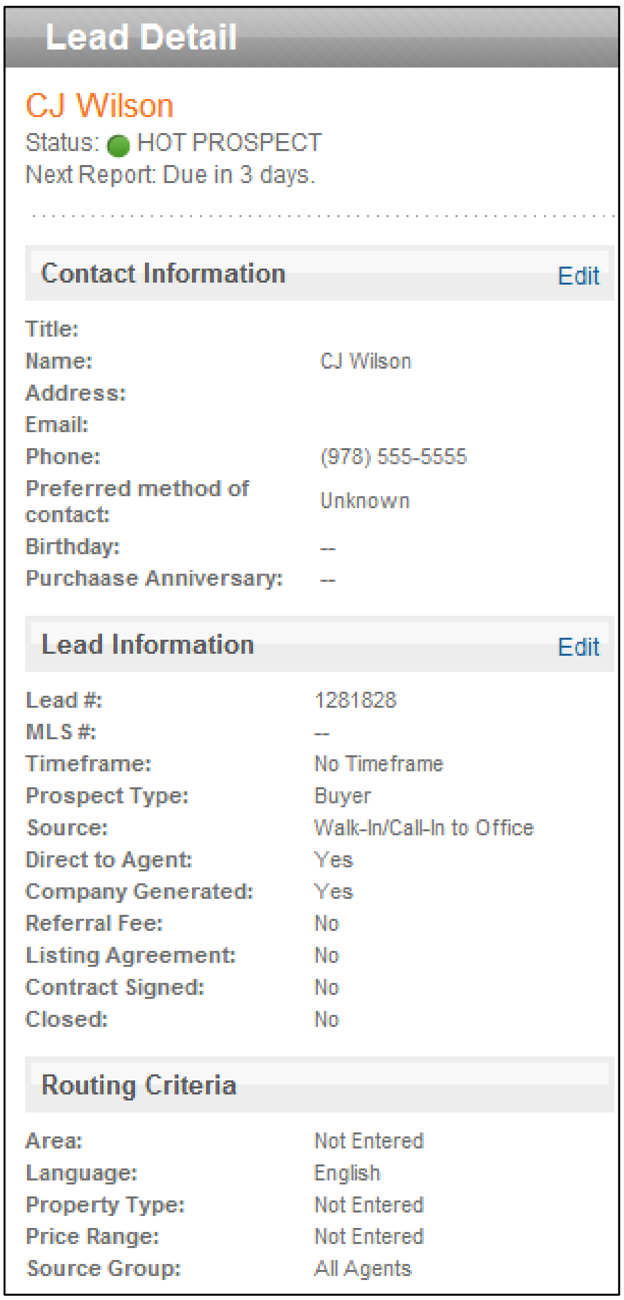
2. **Maximize Grid Size:** Click to view the lead grid in an expanded view

3. **View Leads by Date:** Use the dropdown on the right to select from preset date ranges

4. **Show/Hide Columns:** Click to adjust the columns of data that are visible on the lead grid. To set the view as a default, click the “Set as Default” button

To **view the lead details,** you must **click the name of the client**.

Here is an example of how the **Lead Detail** appears:



Tip: Click the **"Edit"** links to update any client info as needed

At the bottom of the lead detail is a series of tabs that contain additional information about the lead. Click on any tab to display the following:

- **History:** All past updates made by the agent or admin on this lead
- **Follow Up Plan:** The agent can assign, remove, and monitor Follow Up Plans for this lead
- **Lead Emails:** Shows the original email request that was sent to LeadRouter to generate this lead

History | Follow Up Plan | Lead Emails

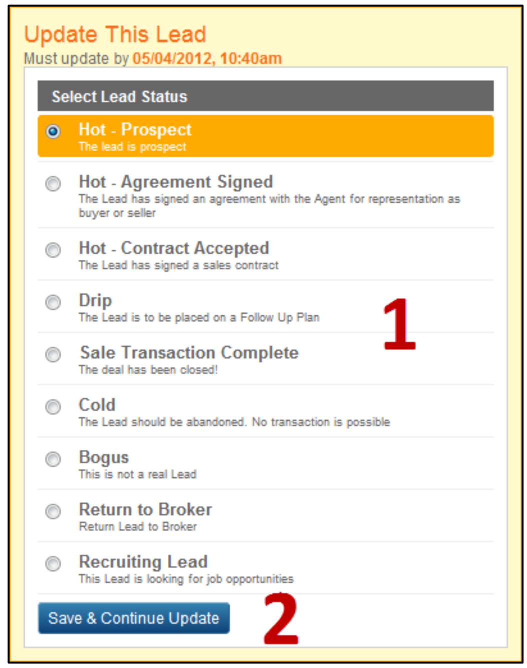
Accepted Lead History

Date	Agent / Admin	Status	Comments + Notes
04/27/12 10:40:47 am EDT	David Braswell	Hot Prospect	Spoke with lead. "test"
04/26/12 1:36:38 pm EDT	David Braswell	Hot Prospect	Left voicemail. "will try back tomorrow"
04/26/12 12:45:07 pm EDT	Tara Hale		New Lead
04/26/12 12:45:07 pm EDT	Tara Hale	Hot Prospect	

Update Leads

In order to continue to receive lead offers you **MUST** update your leads based on your company updating intervals. To update a lead, click on the **“lead name”** to view the **“lead detail”** and use the **“Update This Lead”** module on the right side.

Tip: *If you do not know what your company updating intervals are see your LeadRouter company administrator*

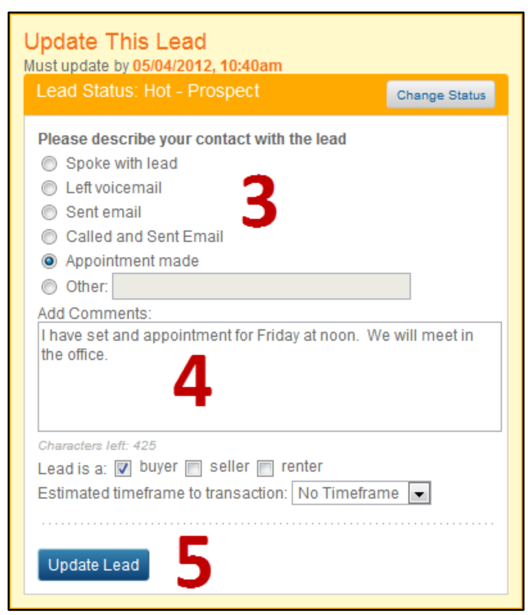


When updating a lead for the ***first time***:

1. **Select** a **“Lead Status”** using the **radio buttons** as shown in the image to the right **(Required)**

2. **Click** the **“Save & Continue Update”** button at the bottom **(Required)**

Tip: *Once the lead has been updated for the first time, any future update follows steps 3-7*

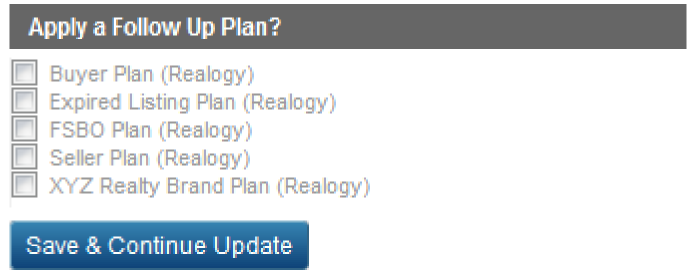


3. Select **one** of the default radio button contact options **(Required)**

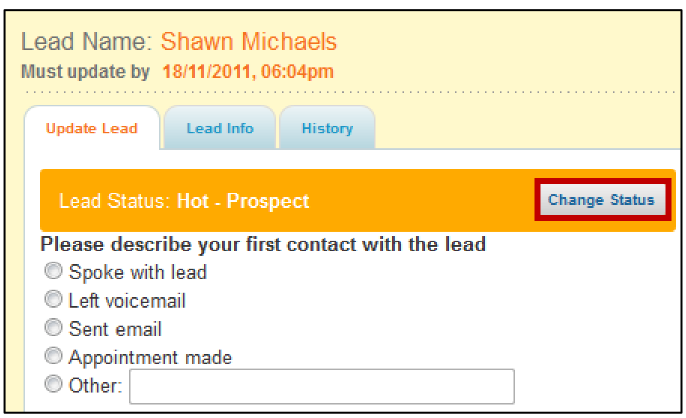
4. Type **Additional Comments (Required)**

5. Click the **“Update Lead”** button **(Required)**

6. ***Optional Step:*** Apply a Follow Up Plan to this lead by checking the box next to the plan desired and click the "**Save & Continue Update"** button



7. **Your Lead Status Update is Complete!**



If a status change is needed, you can always click **"Change Status"** and then repeat **steps 1- 7** to complete the update

(To learn more about each status please refer to the next page)

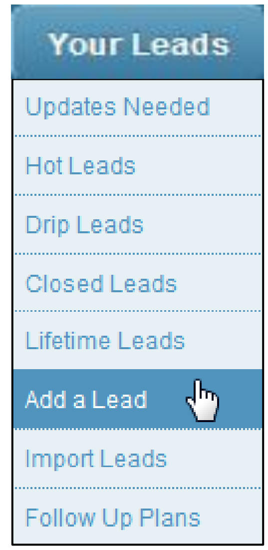
Lead Status	Description
Hot - Prospect	The lead is a buyer, seller, or renter prospect and the agent is actively pursuing and working with the client. Hot leads typically will become a transaction in a few months time **(Short Term Leads)**
Hot - Agreement Signed	A Hot lead that the agent represents the buyer or the seller
Hot - Contract Accepted	A Hot lead and a contract is pending for buying, selling, or renting a home
Drip	The lead is a long term buyer, seller, or renter prospect that is not yet ready to move. Clients the agent wishes to incubate **(Long Term Leads)**
Sale Transaction Complete	The lead is a done deal. The agent has a transaction as their client has bought, sold, or rented a home
Cold*	The agent has determined the lead is not going to become a transaction. The lead is removed from the agent's account
Bogus*	The lead was not real as it contained either a fake phone, email, or it was spam. The lead is removed from the agent's account
Return to Broker*	The agent is unable to work the lead but someone else in the company may be able to. The lead is removed from the agent's account
Recruiting Lead*	The lead is a prospective agent looking to join the company and the management team will work the lead. The lead is removed from the agent's account
Assign lead to Another Agent	This option is enabled by the broker in the company business rules. If this option is activated, you have the ability to send a lead from your account to another trained agent at your company

***If any of the starred statuses are chosen for the update, the lead is removed from the agent's account and sent back to the administrator for review. The agent no longer has to update these leads**

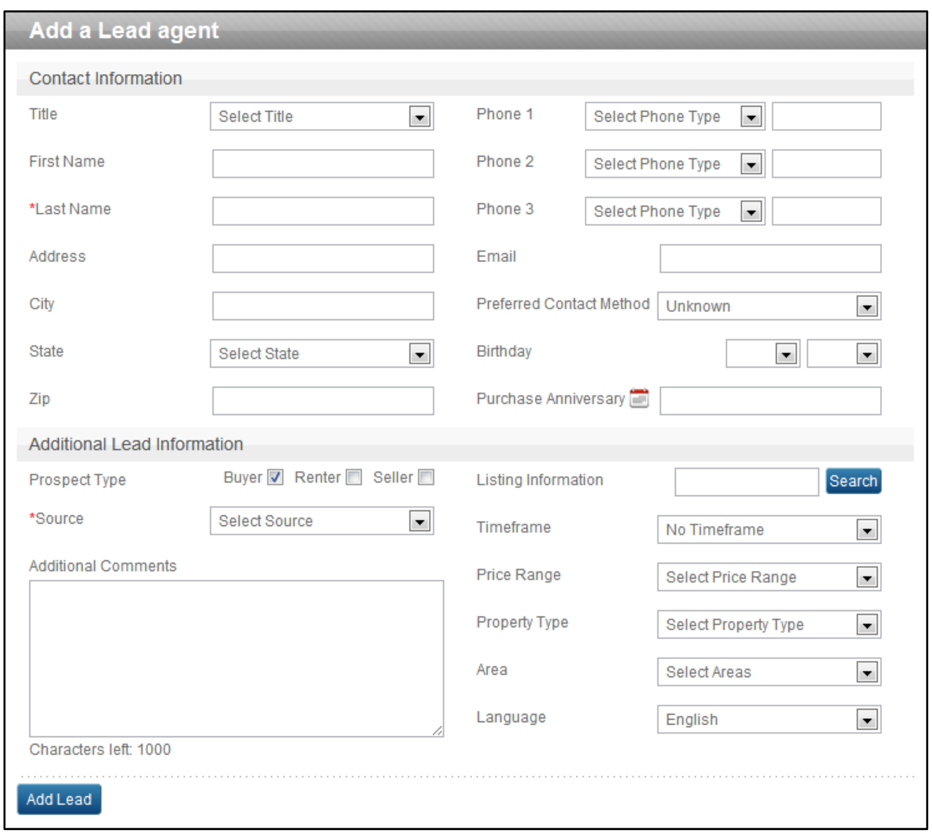
Add a Lead

LeadRouter allows you to track and organize all of your clients in one central database. This section will show you how to add personal leads into LeadRouter to help you stay organized.

Tip: *Personal leads that you add in yourself are considered agent generated leads and are not required to update as you would for a company lead*



1. Navigate to the **"Your Leads"** menu drop down
2. Click on **"Add a Lead"**
3. Fill out the form with all information you know about the client *(**Required:** Last Name, Phone or Email, Source)*
4. Click **"Add Lead"** to enter the lead in the system
5. Repeat steps for all leads you wish to enter to LeadRouter!



Import Leads

On the previous page, you learned how to add leads manually one at a time. This section will cover how you can import leads in bulk to LeadRouter.

The menu location to Import Leads: **“Your Leads” >> “Import Leads”**

Importing from a CSV file

- Import files are required to be in **.CSV file format**.

- If you need a **sample CSV file** there is a sample located in the **“Import Leads”** section of LeadRouter by clicking on the blue question mark icon:

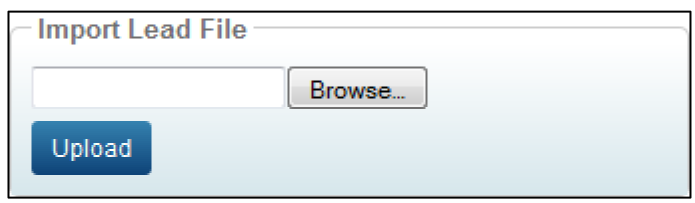
- Import size should be less than **500KB**

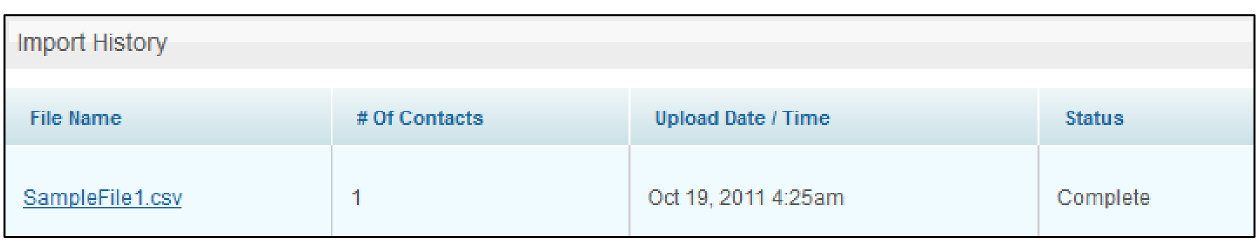
- Imports are available immediately, unless there are **over 1000 records** to be imported. Then the import will be **processed overnight** and available in LeadRouter the following morning.

- The following **fields** are **required**:
  - **Last Name**
  - **Email Address or Phone Number**

When the CSV file is ready to be imported:

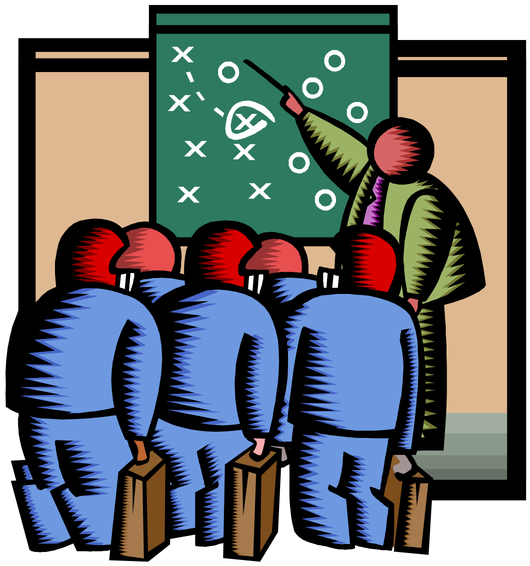
1. Select **“Browse”**
2. Locate your **.CSV file**
3. Click **“Upload”**





Import History

File Name	# Of Contacts	Upload Date / Time	Status
SampleFile1.csv	1	Oct 19, 2011 4:25am	Complete



Chapter 4:
Follow Up Plans

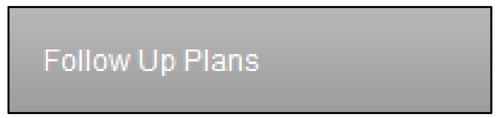
Follow Up Plans

A Follow Up Plan is a drip marketing tool that includes auto email templates, calendar reminders, and print letters that will help the agent keep in touch with clients. LeadRouter allows agents to assign follow up plans to any lead in the system.

IMPORTANT: In order to utilize the Follow Up Plans, the agent **MUST** create the email signature first in the Profile. Click here or go to Page 40 to learn how to create the email signature.

This chapter will cover the following:

- Assigning Follow Up Plans
- Viewing and Removing Follow Up Plans
- Creating Follow Up Plans



Assigning Follow Up Plans

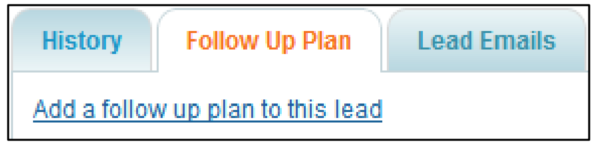
Follow Up Plans are assigned to leads during the lead update process.

The agent is prompted with a screen during the update process that asks what follow up plans the agent would like to assign to the lead.

To assign a follow up plan:

1. **Check the box** next to the plan you wish to assign or remove from that lead
2. Click the **"Save & Continue Update"** button
3. **Complete!**

Follow Up Plans can also be assigned to leads when viewing the lead details. At the bottom is a tab called **"Follow Up Plan".** Click the **Add** link to assign a follow up plan.



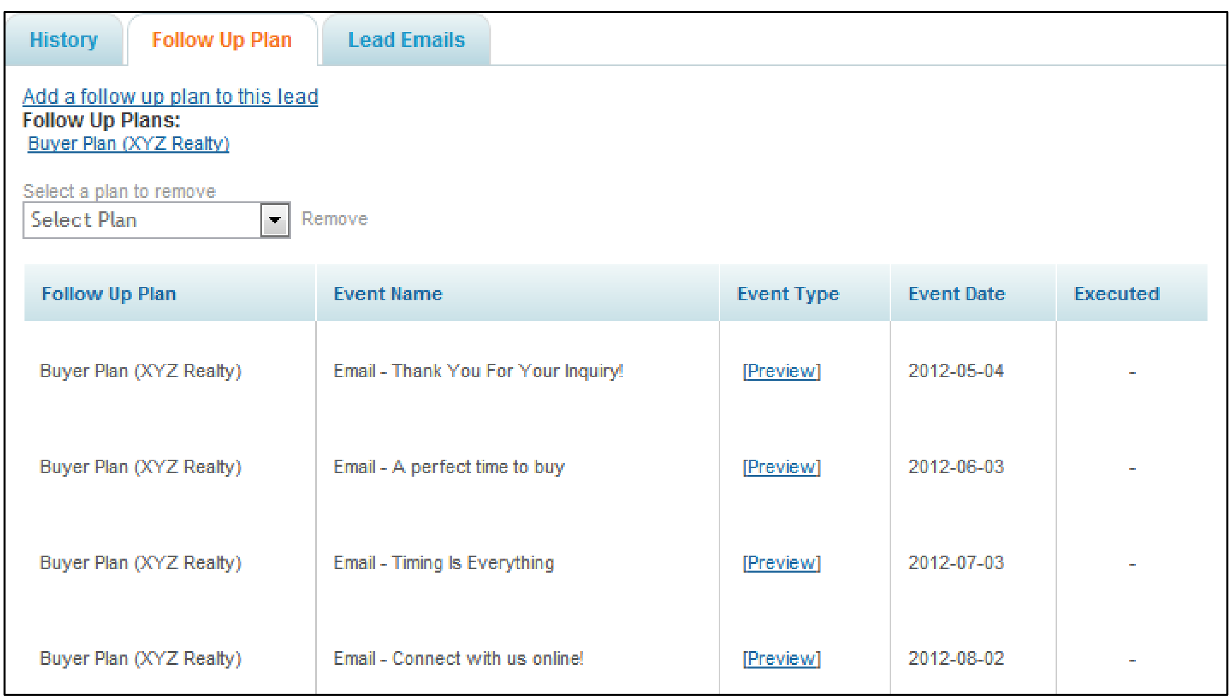
Viewing and Removing Follow Up Plans

Once the plan has been assigned to the lead, the agent can click the **"Follow Up Plan"** tab on the bottom of the lead detail screen.

When this tab is clicked, the Follow Up Plan **"Event History"** is displayed for the agent.

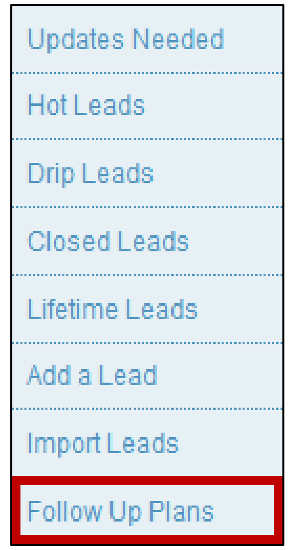
Here the agent can review the event order, preview any events and see the date an event executed.

There is also a **"Remove"** link to **remove** any follow up plans from the lead.



Follow Up Plan	Event Name	Event Type	Event Date	Executed
Buyer Plan (XYZ Realty)	Email - Thank You For Your Inquiry!	[Preview]	2012-05-04	-
Buyer Plan (XYZ Realty)	Email - A perfect time to buy	[Preview]	2012-06-03	-
Buyer Plan (XYZ Realty)	Email - Timing Is Everything	[Preview]	2012-07-03	-
Buyer Plan (XYZ Realty)	Email - Connect with us online!	[Preview]	2012-08-02	-

Creating Follow Up Plans



Agents can create their own custom Follow Up Plans to assign to leads in LeadRouter. Email templates, calendar reminders, and print letters can also be created to be added to these custom follow up plans.

To create a custom Follow Up Plan:

1. Navigate to **"Your Leads" > "Follow Up Plans"** in the top menu

2. Click on the **"Create New Plan"** button at the top right

3. Fill out the **"Plan Name"** and **"Description"** text boxes

4. Check off the following related items for the plan:
   a. Related Statuses
   b. Related Prospect Types
   c. Related Timeframes

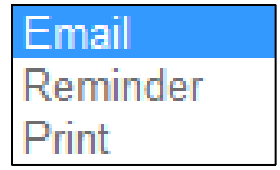
Your choices here control the availability and order of follow up plans shown during the follow up plan assignment process

You are now ready to begin adding events to your follow up plan. You can add events that have been already created by your brand and company or you can create your own events.

The next section describes how to add already made events to your follow up plan.

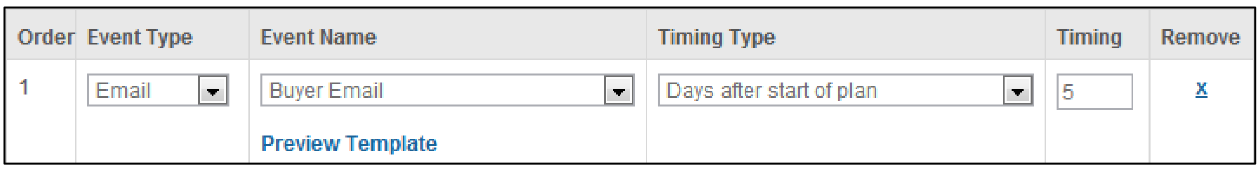
To add an existing event:

1. Select the **"Event Type"** for the event you wish to add:
    a. **Email**
    b. **Reminder**
    c. **Print**



2. Select the **Event** from the **"Event Name"** dropdown

3. ***Optional:*** If you choose to edit the existing content you can do that here by clicking the **"Preview Template"** link and then click the **"Edit"** button at the bottom of the event.



4. Choose the **"Timing Type"** for the event. (This is when you want the event to occur)

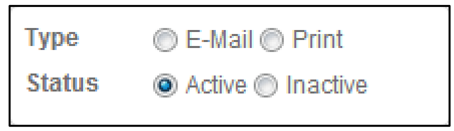
    a. **Days after start of plan:** Enter a "Timing" number for how many days after you assign the plan to the lead that this event will occur)
    b. **Days after previous plan event:** Enter a number for how many days after the previous event occurs that this event will occur
    c. **Specific Date:** Enter the 2 digit month and day for when this event will occur.
        Example: **12/31** if you want the event to occur on December 31st
    d. **Client Birthday:** Based on birthday date in lead detail
    e. **Purchase Anniversary:** Based on purchase anniversary date in lead detail

5. Click the **"Add Event"** button to add additional events to your plan by **repeating steps 1-4**

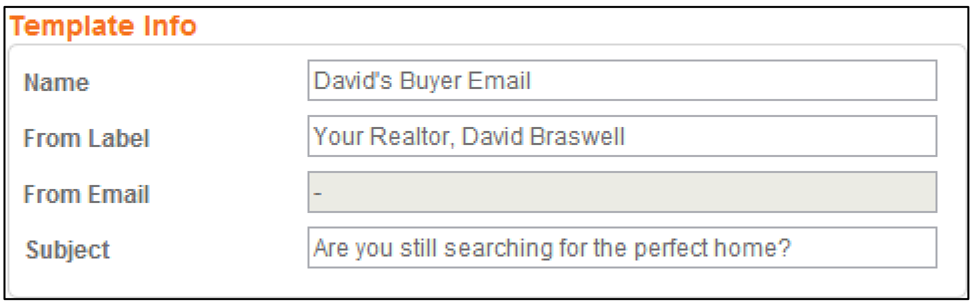
If you choose to create your own events to add to your custom follow up plan, click the **“Add New Template”** button.

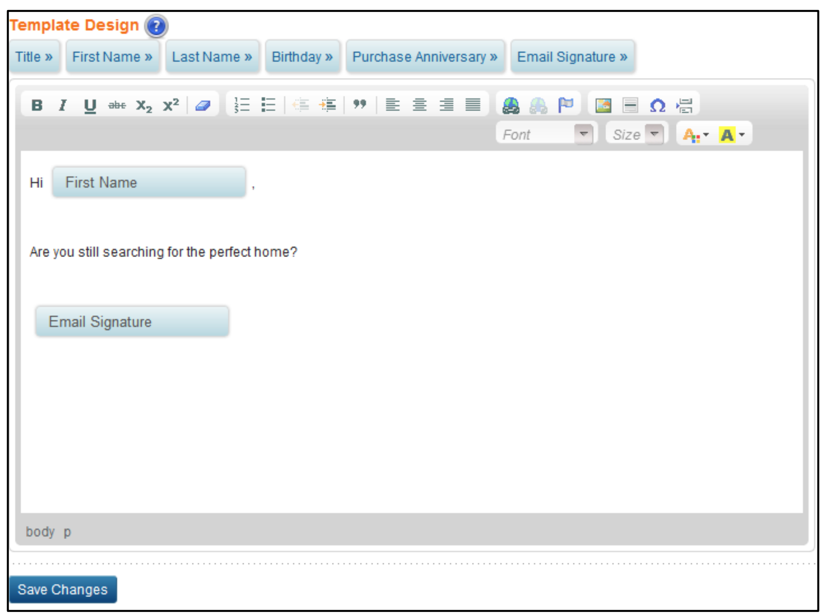
You can also browse and edit existing templates and create new templates by clicking on the **“Template Library”** under the **“Your Leads”** menu.

To create a new “Email” or “Print” Template:



1. Select the **“Type”:** Email or Print
2. Fill out the **“Template Info”**





3. Create your **“Template Design”** using the text editor
4. Click **“Save Changes”**
5. Click the **“Back to Follow Up Plan”** button at the top to return to your plan

Once you have added all events that you want to have in your Follow Up Plan you can save the plan by clicking on the **“Save Changes”** button.

Your plan is now ready to use!

Chapter 5:

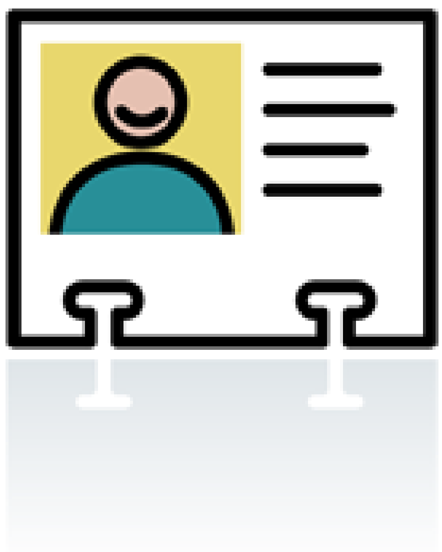
Your Stats

Your Stats

The **"Your Stats"** page contains your **key performance numbers** and **three key reports** that you can use to measure your own performance within LeadRouter.

Key Performance Numbers	Description
Number of Leads Offered	Total amount of times LeadRouter has offered you a lead on your cell phone. Inlcudes all lead offers no matter if the result is accepted, rejected, or voicemail.
Estimated Lead Value	The total value of all your leads using the maximum value of the price range that the client was interested in
Speed of First Update	Average time in hours it takes from accepting a lead to when the lead is first updated by the agent
Conversion Rate	Percentage of closed transactions reported compared to total leads received from LeadRouter for the individual agent
Direct-to-Agent (DTA) Leads	Number of leads that were sent to you directly via your DTA email address or assigned directly to you via your company

Key Reports	Description
Estimated Lead Value	Compares month-to-month results of total leads received and the total estimated value the clients were interested in
Lead Conversion	Shows leads by type of transaction: • Listing Agreement Signed • Contract Signed • Transaction Closed The report data shows the lead name, price range, and days to conversion for each lead
Timeframe Pipeline	Total number of leads for each Timeframe client is looking to move based on status: • Hot • Drip

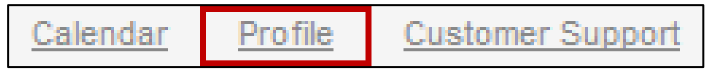


Chapter 6:

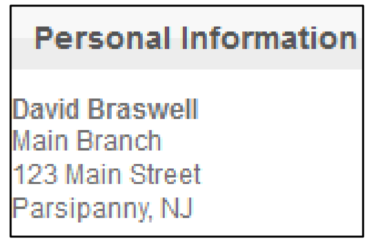
Profile

Viewing Profile

To access **"Your Profile"** in LeadRouter, click the **"Profile"** link at the top of the LeadRouter home page.



Here you can view your personal information and picture. To edit your personal information and picture you must have your administrator make the change in CREST EDG.



Editing Profile

You can edit the following profile information:

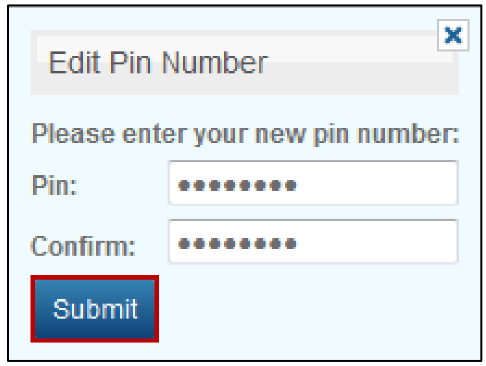
- Mobile PIN
- Lead Notification Information
- Lead Notification Availability
- Email Signature

Mobile PIN

The Mobile PIN is the password you use when you login to the LeadRouter Mobile website on your phone or the iPhone App. The PIN **MUST** be at least **8** characters
in length and can contain both letters and numbers. It may be no longer than 20 characters.

To set the PIN:

1. Click the **"Edit PIN"** link
2. **Enter and Confirm your PIN**
3. Click **"Submit"**



To Access LeadRouter Mobile:

- https://mobile.leadrouter.com
- Download the **"LeadRouter Mobile"** iPhone App from the App Store

Your **Username** for Mobile is your **primary email address** in your profile

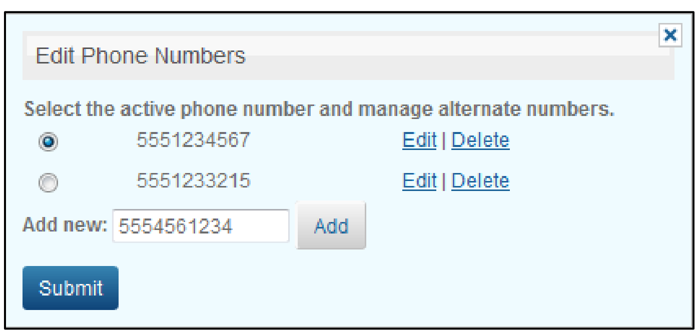
Lead Notification Information

Telephone

This is the telephone number LeadRouter will offer you leads on. Your default number is your cell phone number and can only be edited by your company administrator in CREST EDG. You may add additional phone numbers and set LeadRouter to offer you leads on that phone number here.

To add an additional phone number:

1. Select **“Edit”**
2. Type the phone number in the **“Add New”** field and press **“Add”**
3. You can now select the phone number to be called on and press **“Submit”**



You can also delete any phone number you have added by clicking on the **“Delete”** link

Primary Email

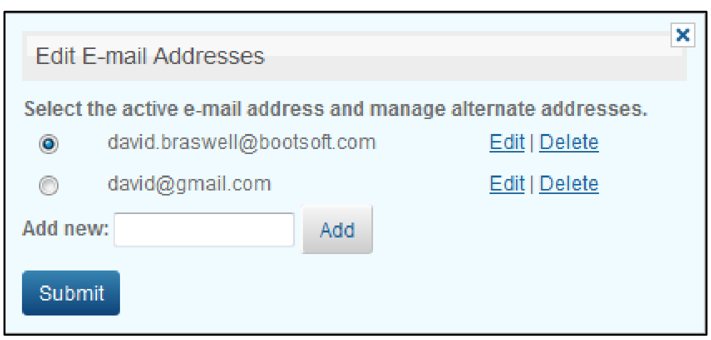
This is the email address LeadRouter will use to send email notifications such as lead acceptance emails and lead update reminder emails. The default email address is only editable by your company administrator in CREST EDG. You may add additional email addresses in this area.

Calendar Notices Email

This is the email address LeadRouter will use to send reminders about any calendar events that are due in your LeadRouter Calendar.

To add additional email addresses:

1. Select **“Edit”**
2. Type the email address in the **“Add New”** field and press **“Add”**
3. You can now select the email address for notifications to be sent to and click **“Submit”**



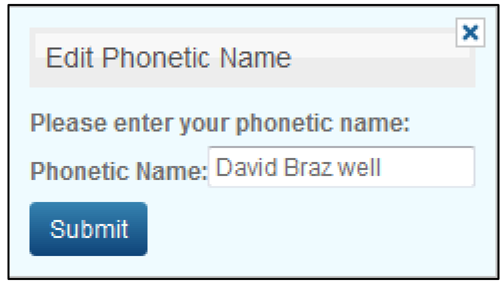
Tip: You can also **delete any email address** you have added by clicking on the **“Delete”** link

Phonetic Name

You can edit the phonetic spelling of your name here so that LeadRouter may pronounce your name correctly when offering you leads. This is an optional feature and does not need to be set.

To set the phonetic spelling:

1. Select **"Edit"**
2. Type the Phonetic spelling of your name
3. Click **"Submit"**



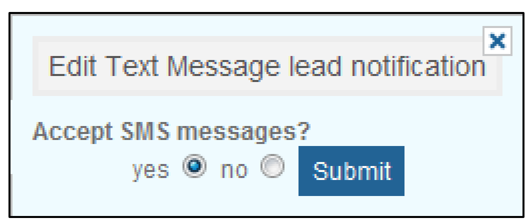
LeadRouter will now pronounce your name the way it is spelled here when offering you leads over the telephone.

Accept SMS Messages

If your company is using a **Voicemail Claim Time** to retrieve leads and the **offer is missed** this setting allows the agent to **accept the lead via text**.

Set **"Accept SMS Messages" to "Yes".**

This will now allow a **text message to be sent to the agent's cell phone** when a lead offer is missed. The agent can **accept the lead by replying to the text** and **typing "YES"** in the message.

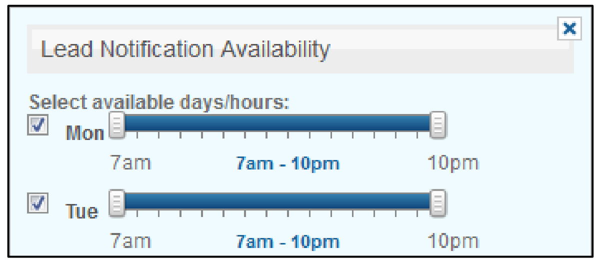


Lead Notification Availability

The hours set here are the default company hours as set by your broker to route leads to agents. These can be adjusted to limit the available days and times LeadRouter may offer you leads.

To edit your availability:

1. Select **"Edit Availability"**
2. Click and drag the slider ends to adjust the available hours each day or uncheck a day to be out the entire day
3. Click the **"Submit"** button

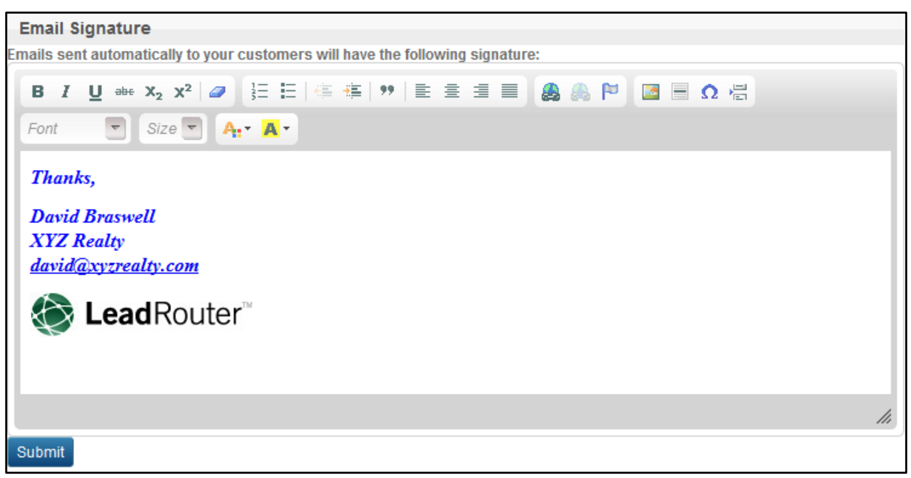


Email Signature

You can edit the email signature that will appear on the bottom of any drip email sent to your clients when using Follow Up Plans. **IMPORTANT: This is required to be set up in order to utilize the Follow Up Plans.**

To edit the email signature:

1. Use the HTML editor to edit the text
2. Click **"Submit"** to save the signature



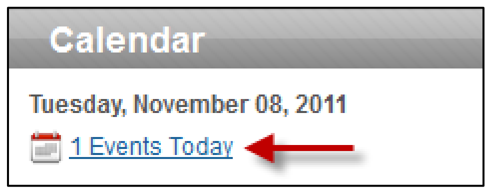
Chapter 7:
Calendar

Navigation

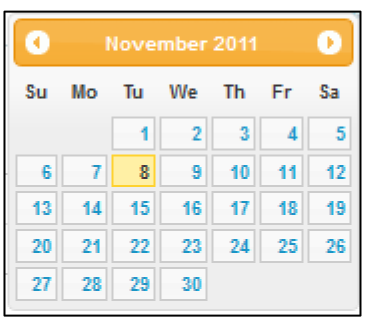
The LeadRouter Calendar allows you to manage events and organize your day in LeadRouter. Events will auto populate in your calendar when you have an event due in a follow up plan and when you have a lead update due.

Your Calendar is accessible in two ways.

1. Click the **“Calendar”** link at the top of the system
2. On the **Home screen**, there is a Calendar box with a link to the current day’s Events



- You may view your events in either a daily or weekly view by clicking the **“Day”** or **“Week”** tabs at the top. You can also jump to a specific date using the **“Jump to Date”** button.



- To navigate to the previous or next date ranges use the **“Prev”** and **“Next”** buttons across the top of the calendar.

Viewing and Adding a Calendar Event

When viewing your calendar, you may view the event details by hovering over the event title. Here you can view the following:

- **Event Title** (Click to View Event Details)
- **View Lead** (Click to View Lead Info)
- **Event Description**

To Add a New Event to your Calendar:

1. Click the **"Create New Event"** button
2. Type the **"Event Title"**
3. Select the **Date and Time** of the Event
4. Add an **Event Description**
5. ***Optional:*** *Search for a lead by name to link to the event*
6. Click **"Save Event"** to add the event to the calendar