

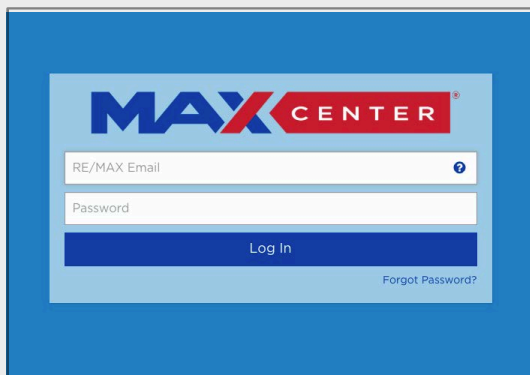
Accept Released Leads

When an agent leaves RE/MAX and has been fully deleted from LeadStreet, that agent's clients will be "released" to the office. Recovering these leads is a two part process.

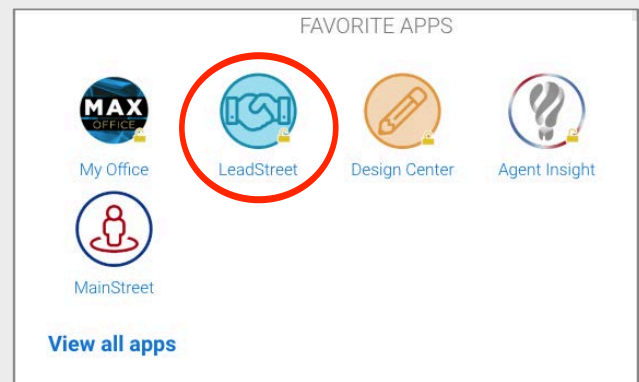
1. First, you have to accept the Released Leads within the office LeadStreet account.
2. Next, you will have to manually transfer these clients from the office contacts to the intended agent(s) within your office.

Please follow the steps below to recover these leads.

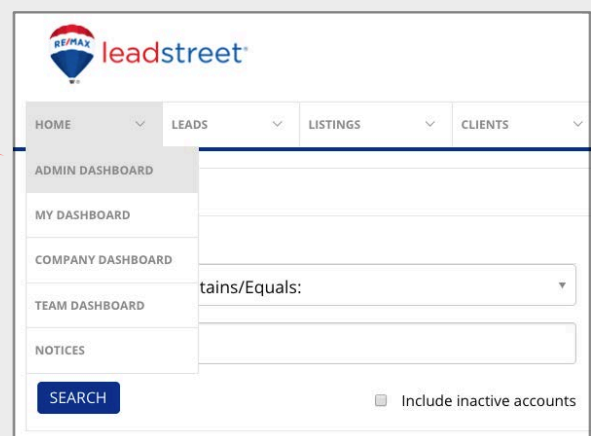
Login at www.maxtech.me using Max Center credentials.



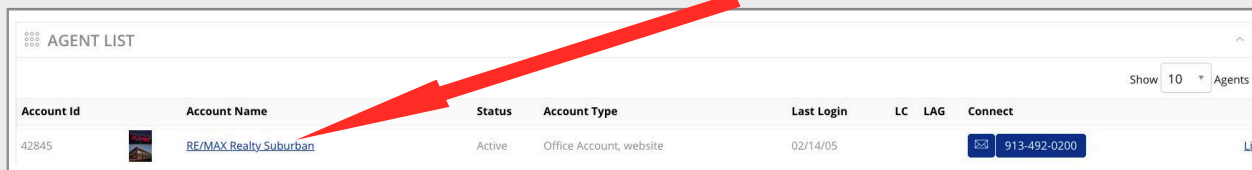
Click on the LeadStreet icon.



Hover over the the Home menu item and select **Admin Dashboard**.



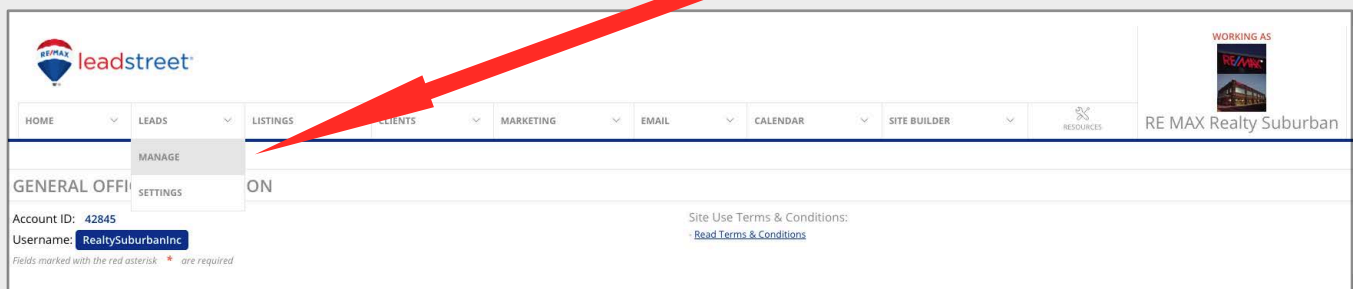
Click on the link for the office account.



Account Id	Account Name	Status	Account Type	Last Login	LC	LAG	Connect
42845	RE/MAX Realty Suburban	Active	Office Account, website	02/14/05			913-492-0200

Step 1: Accept the Released Leads

Hover over the Leads menu and select **Manage**



leadstreet

HOME LEADS LISTINGS CLIENTS MARKETING EMAIL CALENDAR SITE BUILDER RESOURCES

MANAGE

GENERAL OFFICE SETTINGS

Account ID: 42845
Username: [RealtySuburbanInc](#)

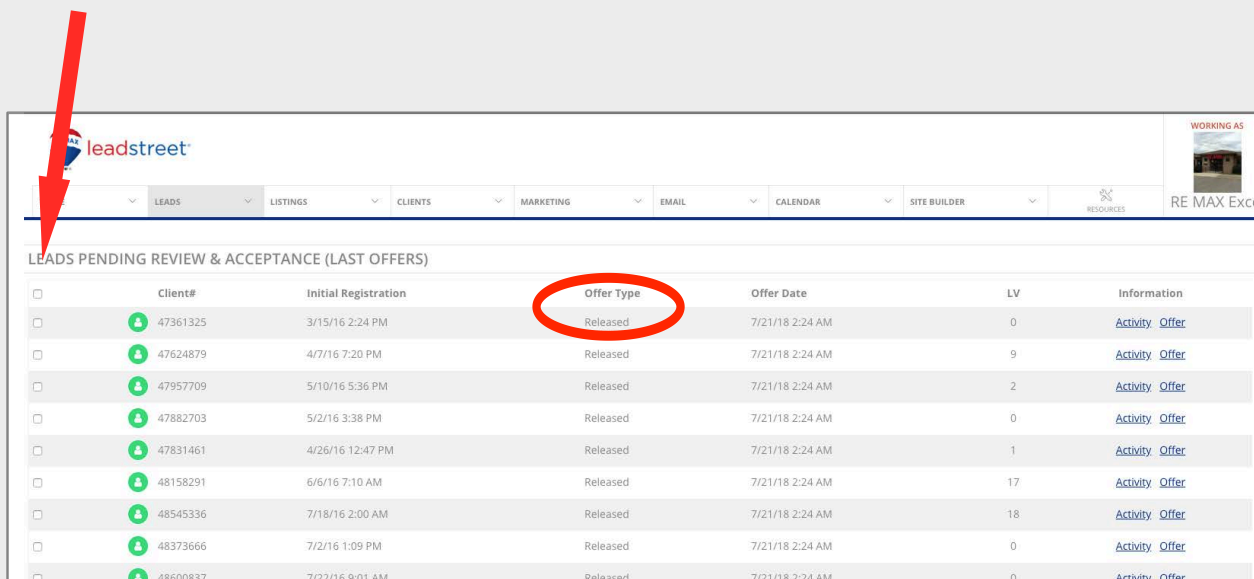
Fields marked with the red asterisk * are required

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WORKING AS
RE MAX Realty Suburban

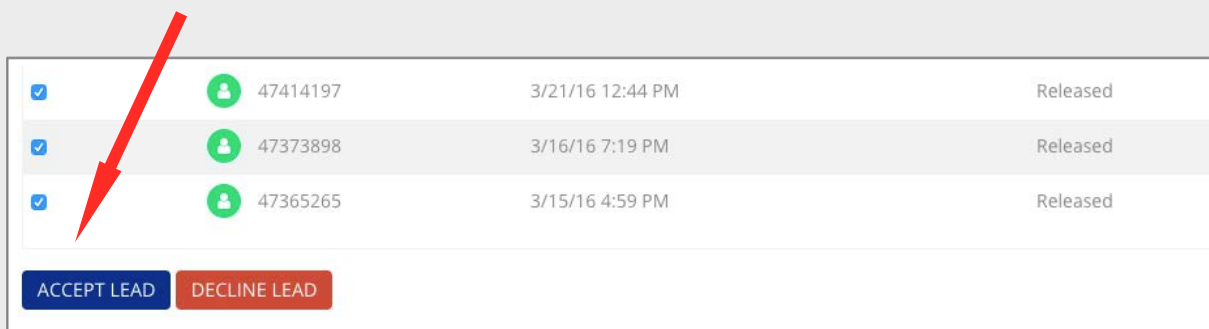
Any leads that have been "released" to the office from former agents will have an offer type of **Released**.

Click on the box to the left of Client# to select the first 100 leads.



<input type="checkbox"/>	Client#	Initial Registration	Offer Type	Offer Date	LV	Information
<input type="checkbox"/>	47361325	3/15/16 2:24 PM	Released	7/21/18 2:24 AM	0	Activity Offer
<input type="checkbox"/>	47624879	4/7/16 7:20 PM	Released	7/21/18 2:24 AM	9	Activity Offer
<input type="checkbox"/>	47957709	5/10/16 5:36 PM	Released	7/21/18 2:24 AM	2	Activity Offer
<input type="checkbox"/>	47882703	5/2/16 3:38 PM	Released	7/21/18 2:24 AM	0	Activity Offer
<input type="checkbox"/>	47831461	4/26/16 12:47 PM	Released	7/21/18 2:24 AM	1	Activity Offer
<input type="checkbox"/>	48158291	6/6/16 7:10 AM	Released	7/21/18 2:24 AM	17	Activity Offer
<input type="checkbox"/>	48545336	7/18/16 2:00 AM	Released	7/21/18 2:24 AM	18	Activity Offer
<input type="checkbox"/>	48373666	7/2/16 1:09 PM	Released	7/21/18 2:24 AM	0	Activity Offer
<input type="checkbox"/>	48600837	7/22/16 9:01 AM	Released	7/21/18 2:24 AM	0	Activity Offer

Click on **Accept Lead**.

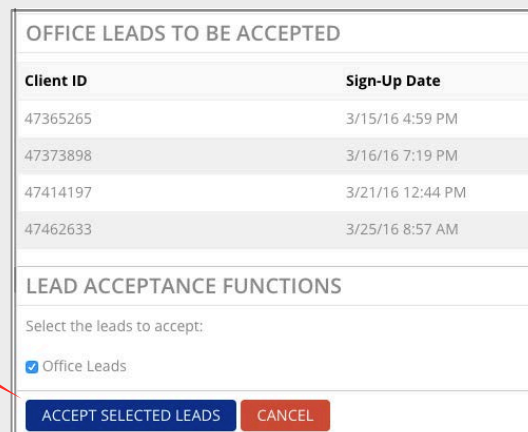


A screenshot of a lead management interface. It features a table with three rows of lead data. Each row has a checkbox on the left, a green person icon followed by a Client ID, a timestamp, and a status. Below the table are two buttons: 'ACCEPT LEAD' (blue) and 'DECLINE LEAD' (red). A red arrow points from the top left towards the 'ACCEPT LEAD' button.

	Client ID	Timestamp	Status
<input checked="" type="checkbox"/>	47414197	3/21/16 12:44 PM	Released
<input checked="" type="checkbox"/>	47373898	3/16/16 7:19 PM	Released
<input checked="" type="checkbox"/>	47365265	3/15/16 4:59 PM	Released

ACCEPT LEAD **DECLINE LEAD**

This will take you to a confirmation page. Click on **Accept Selected Leads**. Repeat this process as many times as necessary to recover all of the released leads.



A screenshot of a confirmation page titled 'OFFICE LEADS TO BE ACCEPTED'. It contains a table with Client ID and Sign-Up Date. Below the table is a section 'LEAD ACCEPTANCE FUNCTIONS' with a checkbox for 'Office Leads' and two buttons: 'ACCEPT SELECTED LEADS' (blue) and 'CANCEL' (red). A red arrow points from the left towards the 'ACCEPT SELECTED LEADS' button.

Client ID	Sign-Up Date
47365265	3/15/16 4:59 PM
47373898	3/16/16 7:19 PM
47414197	3/21/16 12:44 PM
47462633	3/25/16 8:57 AM

LEAD ACCEPTANCE FUNCTIONS

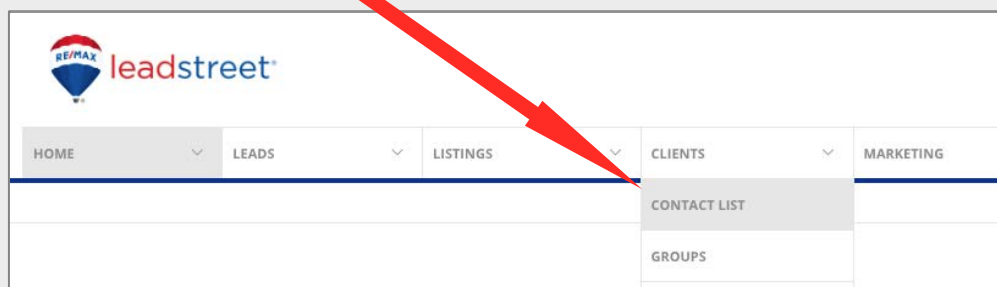
Select the leads to accept:

☒ Office Leads

ACCEPT SELECTED LEADS **CANCEL**

Step 2: Reassign new contacts to agents within the office.

Hover over the Clients menu and select **Contact List**



A screenshot of the leadstreet navigation menu. The menu includes options for HOME, LEADS, LISTINGS, CLIENTS, and MARKETING. The CLIENTS menu is expanded, showing sub-options: CONTACT LIST and GROUPS. A red arrow points from the top left towards the 'CONTACT LIST' option.

RE/MAX leadstreet

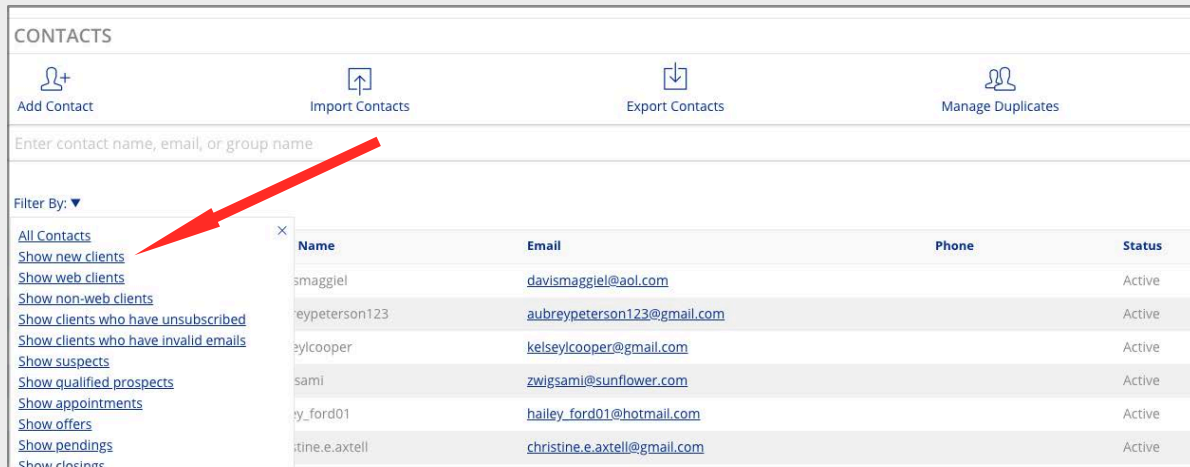
HOME LEADS LISTINGS CLIENTS MARKETING

CONTACT LIST

GROUPS

Most offices don't maintain contacts in the office account. If this is the case, all of the contacts in your contact list will be the newly released clients. If you already have clients in the office contact record, you can filter as follows:

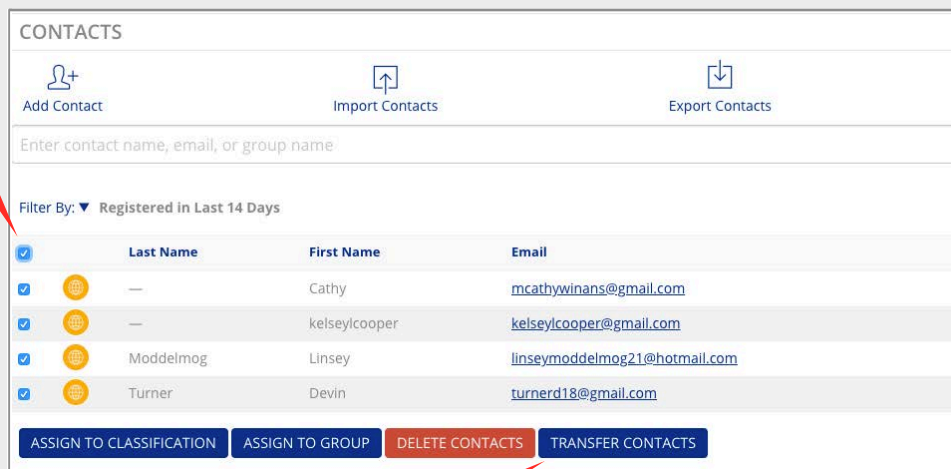
1. Click on Filter By
2. Click on Show New Clients



The screenshot shows the 'CONTACTS' interface with a search bar and four action buttons: 'Add Contact', 'Import Contacts', 'Export Contacts', and 'Manage Duplicates'. Below the search bar is a 'Filter By:' dropdown menu. A red arrow points to the 'Show new clients' option in the dropdown list. The main table displays contact information with columns: Name, Email, Phone, and Status. The table contains six rows of data.

Name	Email	Phone	Status
smaggie1	davismaggie1@aol.com		Active
reypeterson123	aubreyreypeterson123@gmail.com		Active
reylcooper	kelseycooper@gmail.com		Active
sami	zwigsami@sunflower.com		Active
ry_ford01	hailey_ford01@hotmail.com		Active
stine.e.axtell	christine.e.axtell@gmail.com		Active

Click on the box to the left of Last Name in order to select the first 50 clients.



The screenshot shows the 'CONTACTS' interface with the 'Filter By:' dropdown set to 'Registered in Last 14 Days'. A red arrow points to the checkbox in the first column of the table. The table has columns: Last Name, First Name, and Email. The table contains five rows of data. Below the table are four buttons: 'ASSIGN TO CLASSIFICATION', 'ASSIGN TO GROUP', 'DELETE CONTACTS', and 'TRANSFER CONTACTS'. A red arrow points to the 'TRANSFER CONTACTS' button.

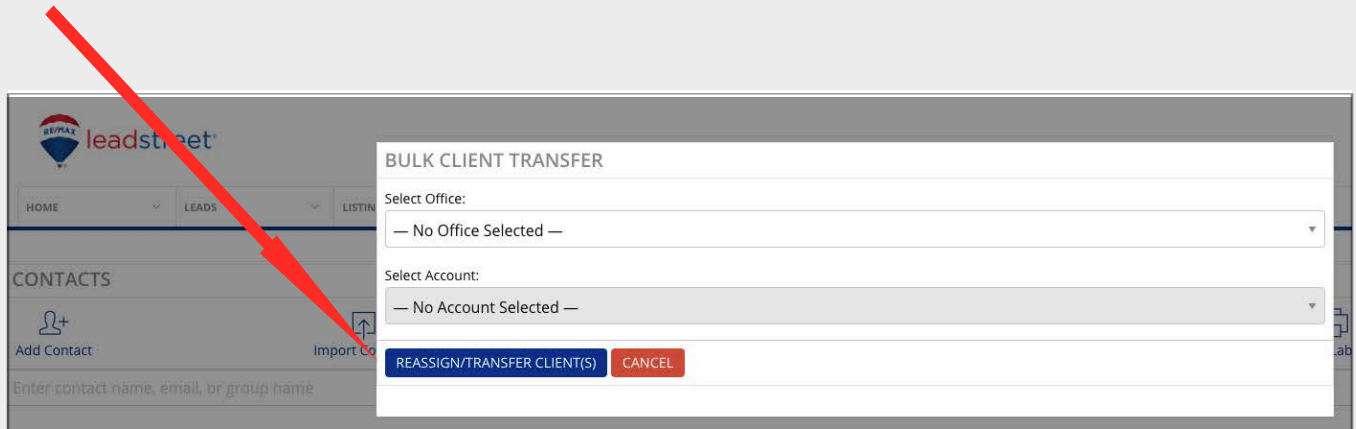
	Last Name	First Name	Email
<input checked="" type="checkbox"/>	—	Cathy	mcathywinans@gmail.com
<input checked="" type="checkbox"/>	—	kelseycooper	kelseycooper@gmail.com
<input checked="" type="checkbox"/>	Moddelmog	Linsey	linseymodelmog21@hotmail.com
<input checked="" type="checkbox"/>	Turner	Devin	turnerd18@gmail.com

Click on **Transfer Contacts**.

Select your office.

Select account.

Click on Reassign/Transfer Clients



The screenshot shows the RE/MAX leadstreet web application. A red arrow points from the top-left text instructions to the 'Import Contacts' button in the 'CONTACTS' sidebar. A modal window titled 'BULK CLIENT TRANSFER' is open, featuring two dropdown menus: 'Select Office:' with the value '— No Office Selected —' and 'Select Account:' with the value '— No Account Selected —'. At the bottom of the modal are two buttons: 'REASSIGN/TRANSFER CLIENT(S)' in blue and 'CANCEL' in red. The background interface includes a top navigation bar with 'HOME', 'LEADS', and 'LISTING' tabs, and a sidebar with 'CONTACTS', 'Add Contact', and 'Import Contacts' options.

Repeat until all clients have been reassigned.