Accept Released Leads

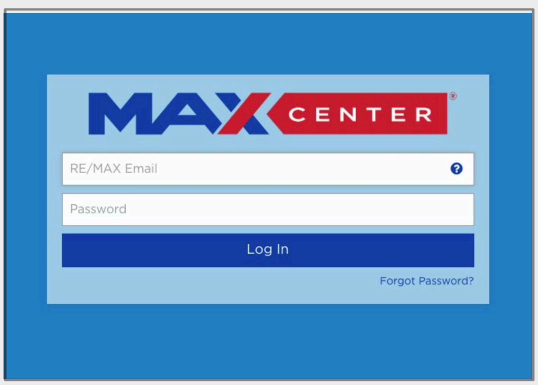
When an agent leaves RE/MAX and has been fully deleted from LeadStreet, that agent's clients will be "released" to the office. Recovering these leads is a two part process.

1. First, you have to accept the Released Leads within the office LeadStreet account.

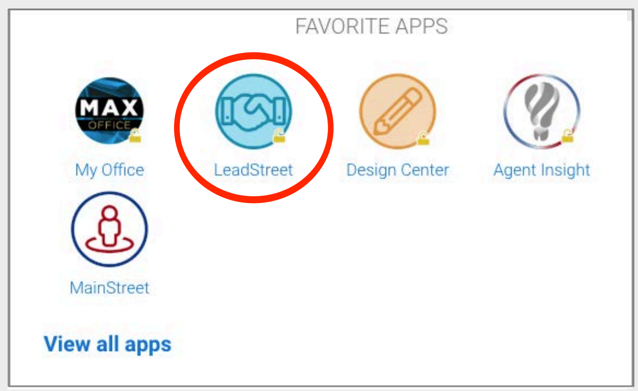
2. Next, you will have to manually transfer these clients from the office contacts to the intended agent(s) within your office.

Please follow the steps below to recover these leads.

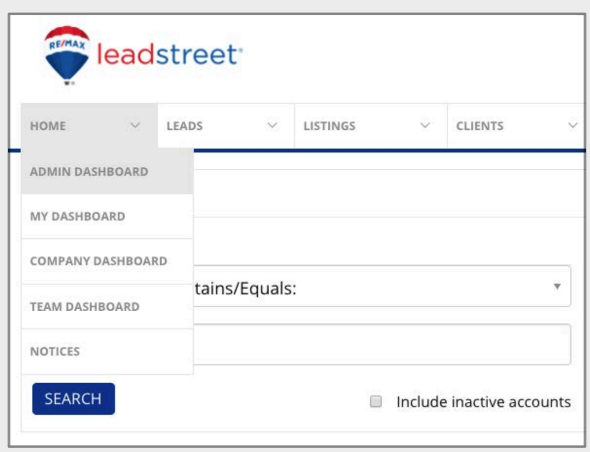
Login at www.maxtech.me using Max Center credentials.



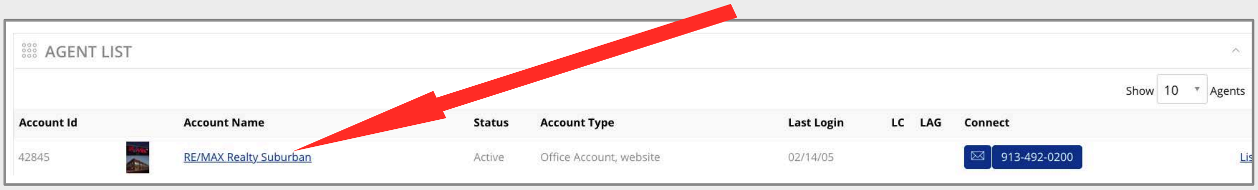
Click on the LeadStreet icon.



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

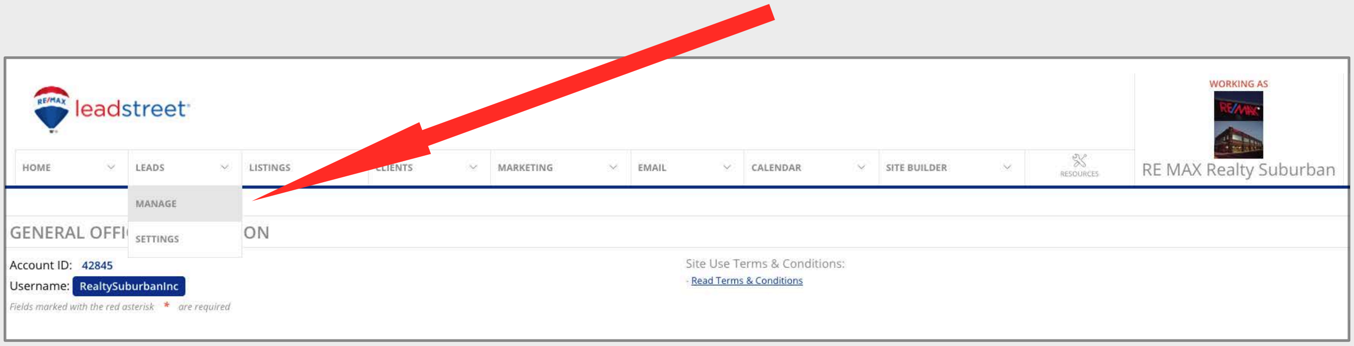


Click on the link for the office account.



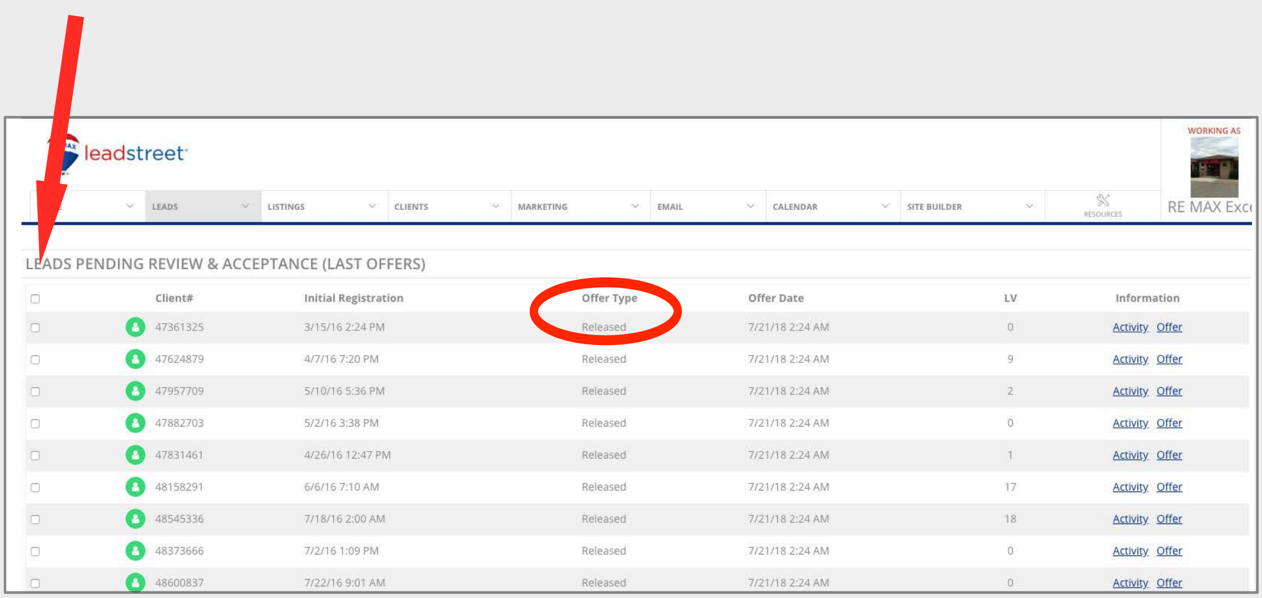
Step 1: Accept the Released Leads

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



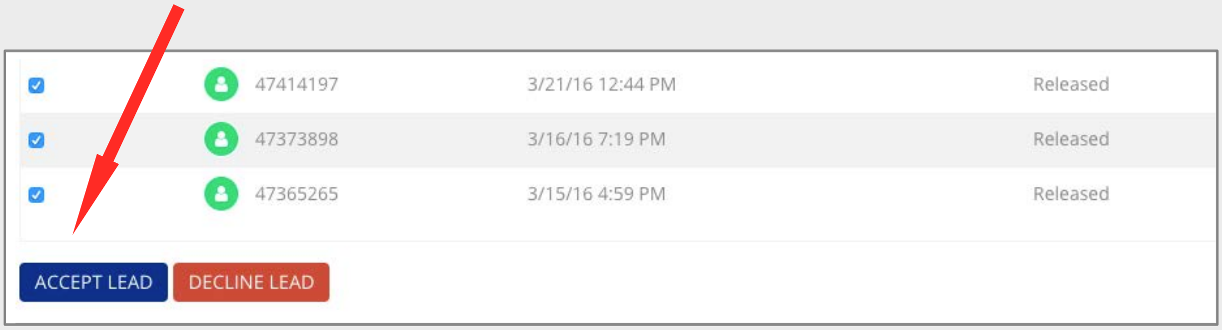
Any leads that have been "released" to the office from former agents will have an offer type of **Released**.

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

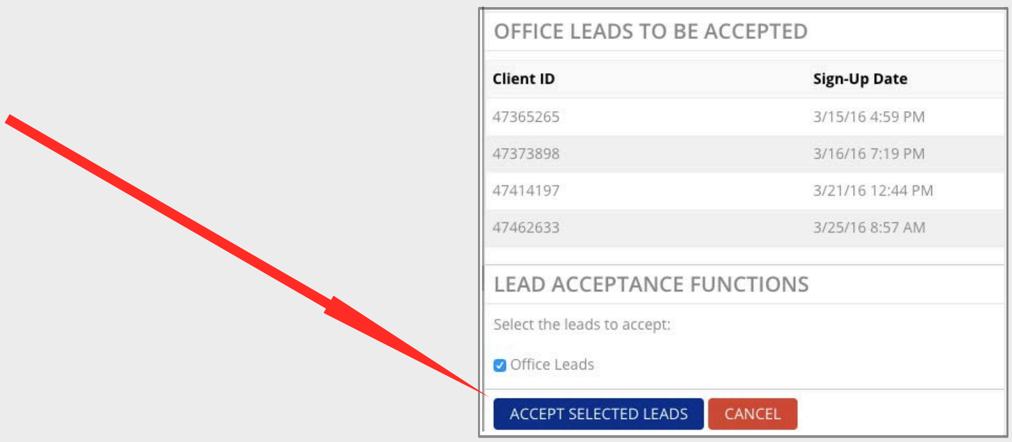


Client#	Initial Registration	Offer Type	Offer Date	LV	Information
47361325	3/15/16 2:24 PM	Released	7/21/18 2:24 AM	0	Activity Offer
47624879	4/7/16 7:20 PM	Released	7/21/18 2:24 AM	9	Activity Offer
47957709	5/10/16 5:36 PM	Released	7/21/18 2:24 AM	2	Activity Offer
47882703	5/2/16 3:38 PM	Released	7/21/18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

Click on **Accept Lead**.

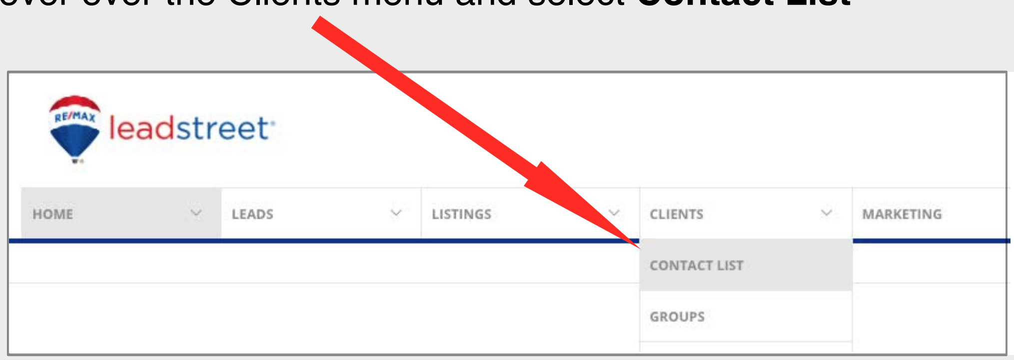


This will take you to a confirmation page. Click on **Accept Selected Leads**. Repeat this process as many times as necessary to recover all of the released leads.



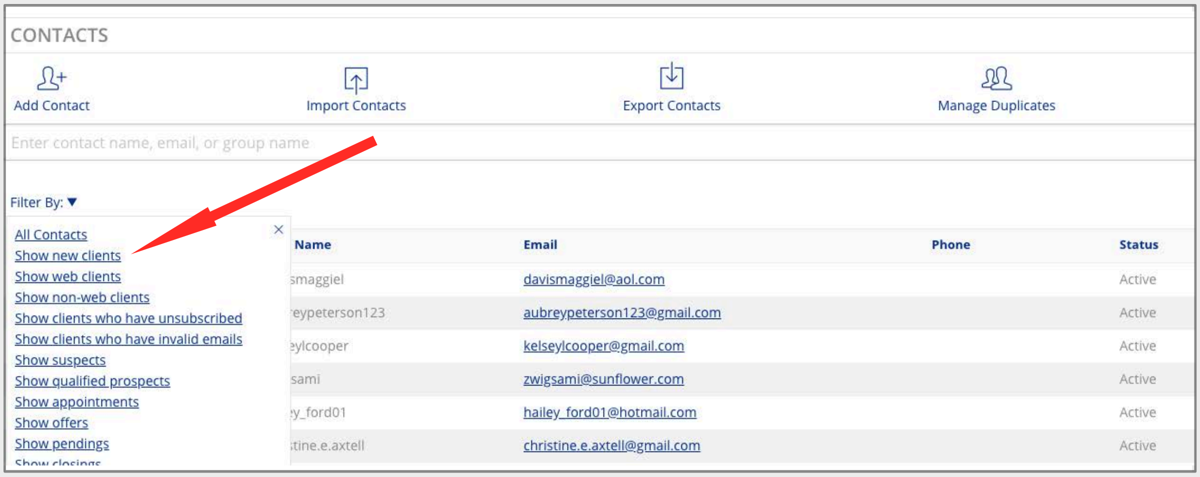
Step 2: Reassign new contacts to agents within the office.

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

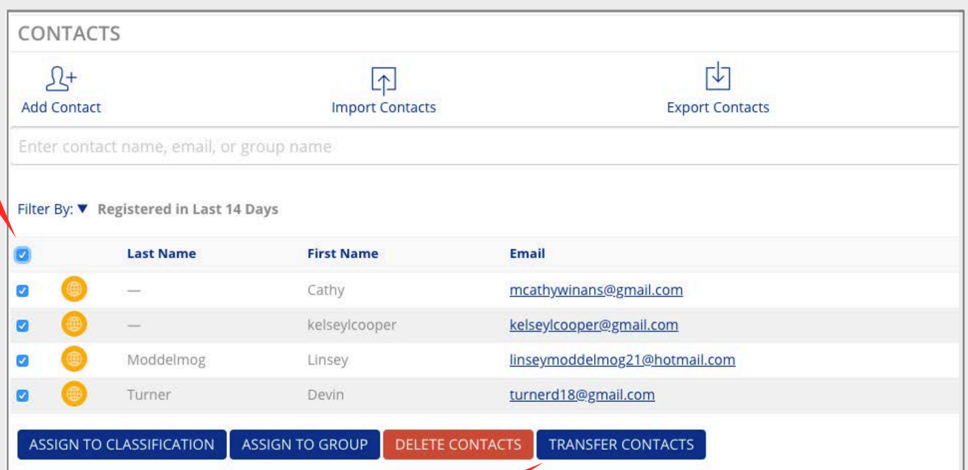


Most offices don't maintain contacts in the office account. If this is the case, all of the contacts in your contact list will be the newly released clients. If you already have clients in the office contact record, you can filter as follows:

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



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

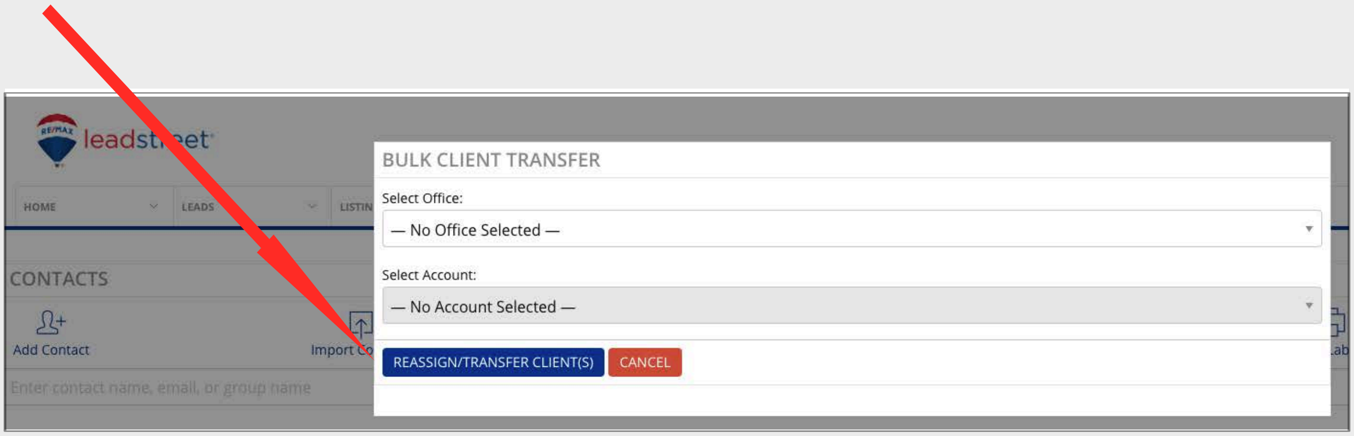


Click on **Transfer Contacts**.

Select your office.

Select account.

Click on Reassign/Transfer Clients



Repeat until all clients have been reassigned.