

# FiveStreet Project Requirements:

## RE/MAX Lead Routing Rules

### Inputs

1. All leads from RE/MAX require the following
    - 1.1. Source
    - 1.2. ListingID
    - 1.3. MLSAgentID
    - 1.4. OfficeID
    - 1.5. Zip Code/ Postal Code (First 3)
    - 1.6. Unique Lead Identifier (email/phone)
  2. A unique @fivestreet.me address will be created for every recipient of leads. A recipient is defined as a receiver of leads and can be any of the following
    - 2.1. An Office
    - 2.2. A Team Leader
    - 2.3. Individual Agent
  3. FiveStreet accounts will be created at the Office level using the following
    - 3.1. Name: Standardized naming convention for Office names  
(ex. <Brokerage Name> <Neighborhood>, <State>)
    - 3.2. Office ID
    - 3.3. Email
    - 3.4. Phone
  4. FiveStreet accounts will be created at the agent level using the following
    - 4.1. Agent Name (or Team name)
    - 4.2. AgentID
    - 4.3. OfficeID
    - 4.4. Email
    - 4.5. Phone
    - 4.6. MLSID
    - 4.7. MLSBoard
  5. All leads (REMAX listing agent and non-REMAX leads) will route through the connector
  6. REMAX Integra will provide on a quarterly (or some agreed upon) interval a list outlining the following
    - 6.1. Full List of Zip/Postal Codes
      - 6.1.1. Office Name/OfficeID assigned to those zip/postal codes
      - 6.1.2. The closest officeID for the zips not serviced by an office
- NOTE: The above will be used to determine weighting and routing of non REMAX listing leads

# High Level Requirements

## 1. FiveStreet Connector

- 1.1. Will maintain a list of OfficeID with associated Zip/Postal Codes and servicing agents for each Zip/Postal Code.
  - 1.1.1. The source of this information will be provided on a quarterly (or some other agreed upon interval) basis by Integra
- 1.2. Will store all submitted inquiries with the following details
  - 1.2.1. LeadEmail
  - 1.2.2. LeadPhoneNumber
  - 1.2.3. OfficeID matching the office account the lead was submitted to
  - 1.2.4. Zip/Postal Code
- 1.3. Delivery to FiveStreet
  - 1.3.1. The connector transforms the lead submission to a format supported by FiveStreet
  - 1.3.2. Lead is routed to the appropriate Office/Agent account depending on input from RE/MAX

## 2. RE/MAX.com Listing Leads

- 2.1. Source = RE/MAX.com or RE/MAX.ca
- 2.2. Lead Data
  - 2.2.1. Name
  - 2.2.2. Email
  - 2.2.3. Phone
  - 2.2.4. Source
  - 2.2.5. Notes/Message
  - 2.2.6. Property Address
  - 2.2.7. Custom Data
    - 2.2.7.1. ListingID
    - 2.2.7.2. MLSAgentID (or some agreed upon unique ID that shared between REMAX, the Connector and FiveStreet)
    - 2.2.7.3. OfficeID
    - 2.2.7.4. Property of Interest - Address
    - 2.2.7.5. Property of Interest - URL
    - 2.2.7.6. List Price
    - 2.2.7.7. Other custom fields (Web Activity?, IsRental?)
- 2.3. Destination: Connector
  - 2.3.1. See FiveStreet Connector for details
- 2.4. Rules
  - 2.4.1. Connector accepts the lead submission

- 2.4.2. Connector determines the corresponding Office
- 2.5. Delivery to FiveStreet
  - 2.5.1. The connector transforms the lead submission to a format supported by FiveStreet
  - 2.5.2. Lead is routed to the appropriate Office/Agent account.
    - 2.5.2.1. Once accepted by FiveStreet any Office level routing rules will be applied

NOTE: At this time the lead has been routed to the listing agent, any broadcast rules are managed inside of FiveStreet by the team leader or individual agent. Rebroadcast rules will be managed at the Office Level

### 3. Non-RE/MAX Listing Leads

- 3.1. Source = RE/MAX.com & remax.ca & global.remax.com
- 3.2. Lead Data
  - 3.2.1. Name
  - 3.2.2. Email
  - 3.2.3. Phone
  - 3.2.4. Source
  - 3.2.5. Notes/Message
  - 3.2.6. Custom Data
    - 3.2.6.1. MLSAgentID (or some agreed upon unique ID that shared between REMAX, the Connector and FiveStreet)
    - 3.2.6.2. Property of Interest - Address
    - 3.2.6.3. Property of Interest - URL
    - 3.2.6.4. List Price
    - 3.2.6.5. Other custom fields (Web Activity?, IsRental?)
- 3.3. Destination: Connector
  - 3.3.1. See FiveStreet Connector for details
- 3.4. Rules for Office assignment
  - 3.4.1. When an inquiry is submitted the **email address** for the lead are compared with the RE/MAX database of previously submitted leads and connected agents.
  - 3.4.2. If Agent and Type information are not provided by RE/MAX:
    - 3.4.2.1. When an inquiry is submitted the email address and zip/postal code for the lead are compared with the lead history of previously submitted inquiries and office assignments
    - 3.4.2.2. If lead history is found for this **email address** then connector will use the previously assigned OfficeID
    - 3.4.2.3. If no lead history for this **email address** are found:
      - 3.4.2.3.1. The connector will determine the servicing office(s).

- 3.4.2.3.1.1. If there is only one servicing office for the zip the connector will submit the lead to the corresponding Office account
    - 3.4.2.3.1.2. If there are more than one servicing offices for the zip the connector will select an Office account on a weighting system provided by RE/MAX on a zip level
    - 3.4.2.3.2. Log the selection processes including eligible offices and respective weightings along with the selected officeID
    - 3.4.2.3.3. Log the selected office for subsequent inquiries from this email address and zip/postal code
  - 3.4.3. If Agent and Type information are provided:
    - 3.4.3.1. The inquiry's details along with AgentID and Type will be routed directly to FiveStreet
- 3.5. Delivery of lead to FiveStreet
  - 3.5.1. If OfficeID is calculated/retrieved by the connector then it will be passed to FiveStreet along with the inquiry details
  - 3.5.2. If AgentID and Type is provided by RE/MAX the connector will send AgentID and Type along with inquiry details to FiveStreet

#### **4. FiveStreet**

- 4.1. FiveStreet will adhere to the following priority determined by RE/MAX when routing leads
  - 4.1.1. Favourited Agent
  - 4.1.2. Connected Agent
  - 4.1.3. Listing Agent
  - 4.1.4. Everything else
- 4.2. FiveStreet Will:
  - 4.2.1. Check for the presence of OfficeID, AgentID, and Type from the FiveStreet Connector and employ the following logic
    - 4.2.1.1. OfficeID:
      - 4.2.1.1.1. Present - Assign using FiveStreet Routing rules
      - 4.2.1.1.2. Not Present - Error to FiveStreet Connector and Connector will reprocess as new lead
    - 4.2.1.2. AgentID and Favourited Type
      - 4.2.1.2.1. Present - Assign directly to Agent
      - 4.2.1.2.2. Not Present - Error to FiveStreet Connector and Connector will reprocess as new lead
    - 4.2.1.3. AgentID and Connected Agent Type
      - 4.2.1.3.1. Present - Update Agent and Office
      - 4.2.1.3.2. Not Present - Error to FiveStreet Connector and Connector will reprocess as new lead
    - 4.2.1.4. AgentID and Listing Agent Type

- 4.2.1.4.1. Present - Route to Office and Agent via Listing Alert rule
  - 4.2.1.4.2. Not Present - Error to FiveStreet Connector and Connector will reprocess as new lead.
- 4.2.2. Upon claim or returning or unassignment or unclaim RE/MAX will get an update with the new agent ID for that email and update their Connected Agent Database

## Clarifications and Open items

### Lead Flow to FiveStreet Connector

#### Option 1:

Homes.com sends lead inquiries to RE/MAX pre connector  
REMAX pre connector augments lead inquiry with connected/favorited logic  
REMAX pre connector sends to FiveStreet Connector  
FiveStreet connector submits leads to FiveStreet

#### Option 2:

Homes.com sends lead inquiries to FiveStreet Connector  
FiveStreet Connector queries REMAX pre connector for connected/favorited logic  
FiveStreet Connector submits leads to FiveStreet

#### Option 3:

Homes.com queries REMAX preconnector for connected/favorited logic  
Homes.com sends lead inquiries to FiveStreet Connector  
FiveStreet Connector submits leads to FiveStreet

### Historical connected agent logic

*Given the proposed workflow historical connected agent logic will need to be managed by the RE/MAX pre:connector (API) as this has been determined as the owner of connected and agent favorited logic*

### Connected Office Logic on Agent Moving of Office: Graeme to determine Business Rule

Option 1: If agent transfers to another office, connected leads will stay with Office unless lead has favorited agent

Option 2: If agent transfers to another office, connected leads will stay with Agent