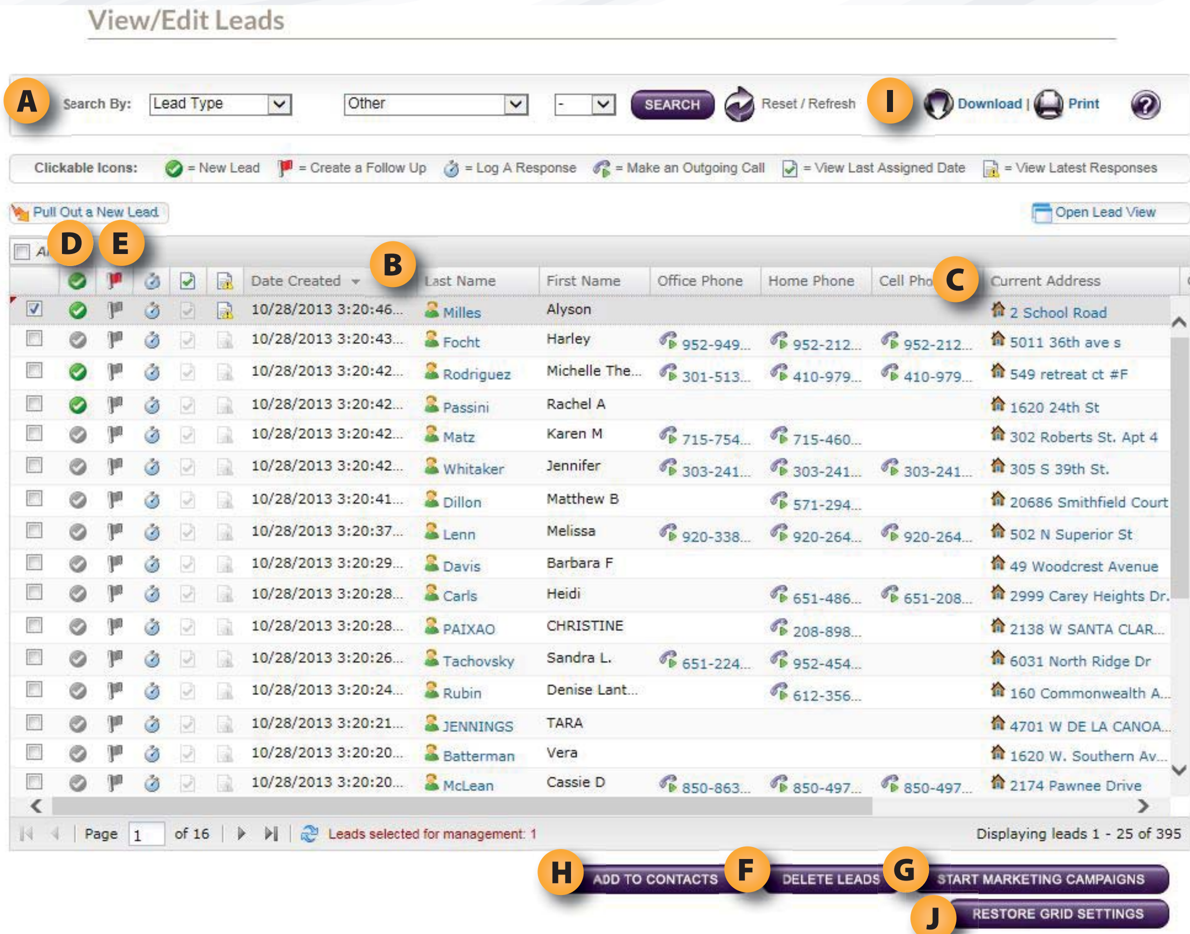
unify®

Fast Start Guide

Leads

A Single Access Solution that helps Loan Originators
become ***more*** efficient and communicate ***more*** effectively.



Leads/(View/Edit)

A. Search for Leads

You can search for specific contacts using the "Search by" options located at the top of the page. You can search by any of the categories in the drop down menu, and narrow it down by specific details using the middle drop down lists. If you want to add an additional level to your search, select either "and" or "or" in the drop down to the right. When you have your search criteria selected, click "Search" and the results will appear in the tables below. Your search parameters will also be displayed just below the search bar. The "Reset" button will clear the search parameters. The "slide" at the bottom of the lead grid will allow you to move from page to page of your leads.

B. View Lead Information

You can view the Lead's information by clicking on the lead's last name, which will be in blue.

C. View Lead Address

You can view the contact's home location in Google Maps by clicking on the contact's address, which will be in blue.

D. New Lead Icon

All Leads are new until you designate them as "old," which will switch them from green to gray. The new/old designations allow you to quickly identify new leads right away.

E. Follow Up Sent Icon

Clicking the "Follow Up Sent" icon allows you to mark a lead with a flag for future follow up action.

F. Delete Leads

To delete a lead, check the box to the left on the line on which they appear. When you do this, the "Start Marketing Campaigns", "Add to Contacts," and "Delete Leads" buttons will become active. Click on the "Delete Leads" button. You will be prompted to confirm this action. Click yes to continue. The "Lead" and all of their campaigns will be deleted. If there are "Pay Up Front" campaigns running, the unused portion of the purchase will be refunded to your account balance. By checking the box at the top of the column, you can select or deselect all of the leads in the search.

G. Start Campaigns

To begin a campaign, select the Leads you want to include by checking the box to the left of their name. When you do this, the "Start Marketing Campaign", "Add to Contacts", and "Delete Leads" buttons will become active. Click on the "Start Marketing Campaign" button. This will take you to the "Campaign Library" where you can select the campaign you want to begin.

H. Add to Contacts

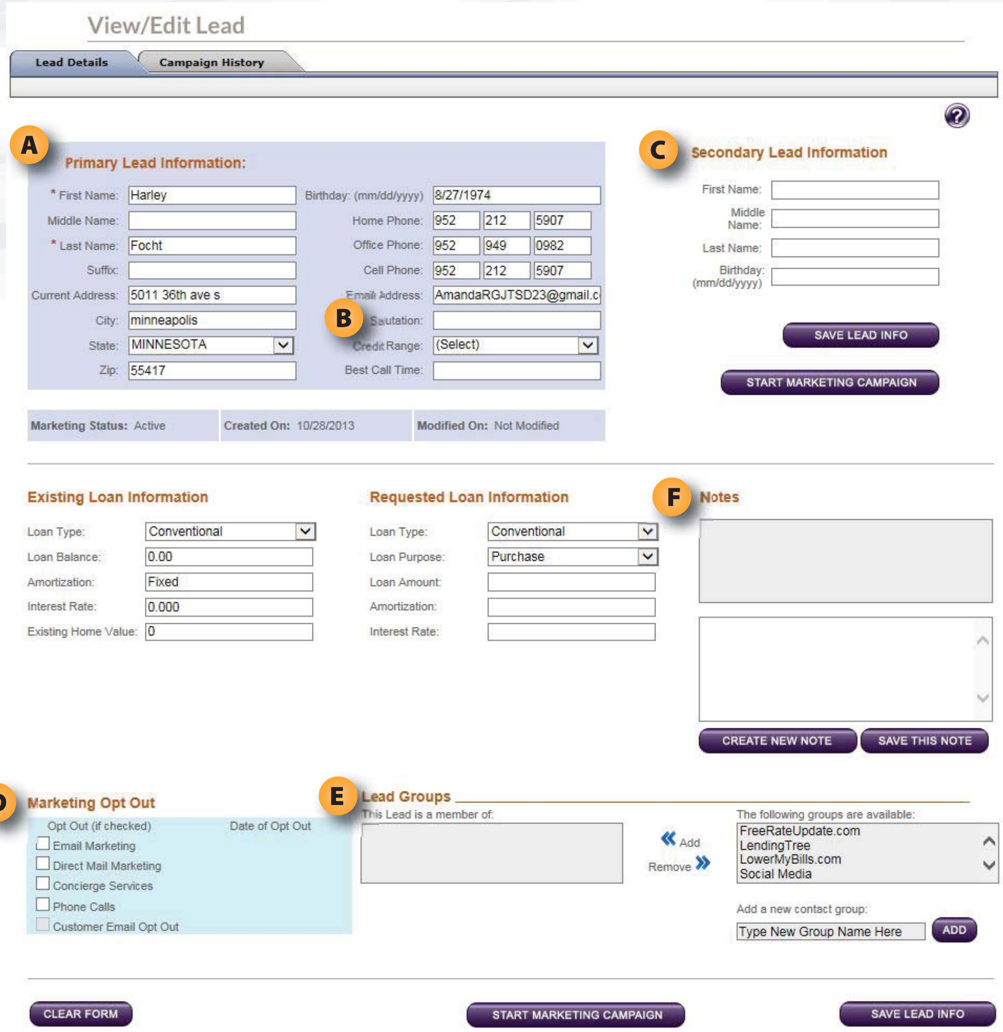
To add a lead to your contacts, select the Leads you want to include by checking the box to the left of their name. When you do this, the "Start Marketing Campaign," "Add to Contacts," button will become active. Click on the "Add to Contacts" button. This will add the lead to your contacts; the lead will also remain in the leads section unless you delete it.

I. Download Leads

To download leads, click on the "Download" link at the top right hand side of the page. In some browsers, a special "Allow Download" bar may appear at the top. In these cases, click that bar, click "Allow" and then click "Download" again.

J. Restore Grid Settings

You are able to rearrange the columns in the table by clicking and dragging the column header to a new location in the header order. If you want to reset the table back to its default order, click the "Restore Grid Settings" button.



Leads/Lead Details

A. Primary Lead Information

Complete as much information as you have about this lead. This information will be used for your email and direct mail marketing campaigns. If you have information about the "Secondary Lead," or "Referral Information," complete that as well and then click "Save Lead Info" at the bottom of the page. Once you have saved this information, you can add notes or start marketing campaigns by clicking the "Start Marketing Campaign" button that is now available at the bottom of the page.

B. Salutation

In some cases, the "Lead's" name is printed on the pieces we produce. If this field is left blank, this will usually appear something like "Dear Robert." By filling in this field, you can override this standard greeting with something more personal, such as "Hey Bobby!"

C. Secondary Lead Information

Complete as much information as you have about the Secondary Lead.

D. Marketing Opt Out

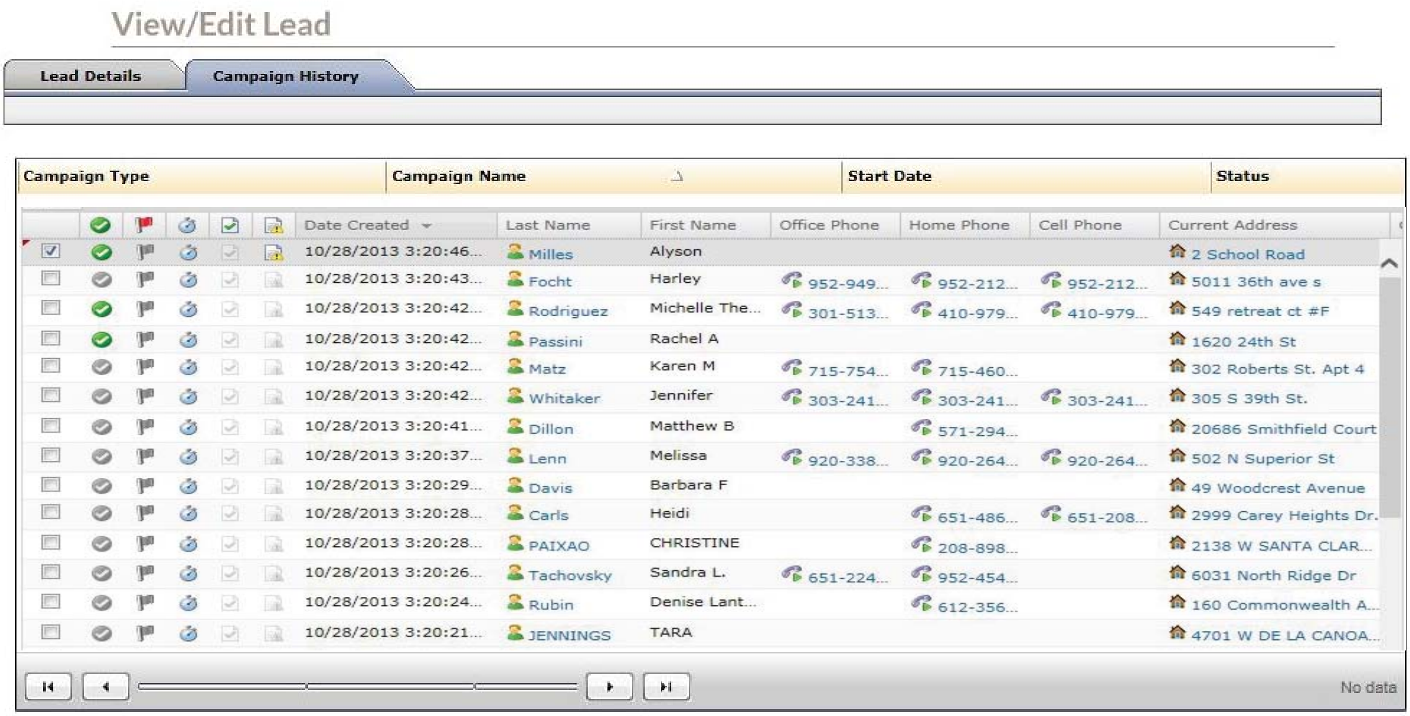
You can manage what forms of marketing will be sent to the lead here. By selecting an item, you are telling the system to NOT send this form of marketing to this lead. The Customer Email Opt Out will be checked if the customer has unsubscribed from email marketing. This will opt the lead out of marketing emails only, they will still receive any personally generated or one on one contact touches that you send.

E. Lead Groups

This area displays any groups you have designated this lead to be in. For example: past clients, friends, family, or co-workers. You can add or remove this lead from a group by selecting the group name, and clicking on the "Remove" or "Add" arrows. You can also create a new group by typing the group name in the appropriate field and clicking the "Add" button.

F. Notes

Notes can only be added after a new "Lead's" information has been saved. Once this is done, you can type notes in the bottom window and then click "Save. This Note" The notes will appear in the top window along with a date stamp.

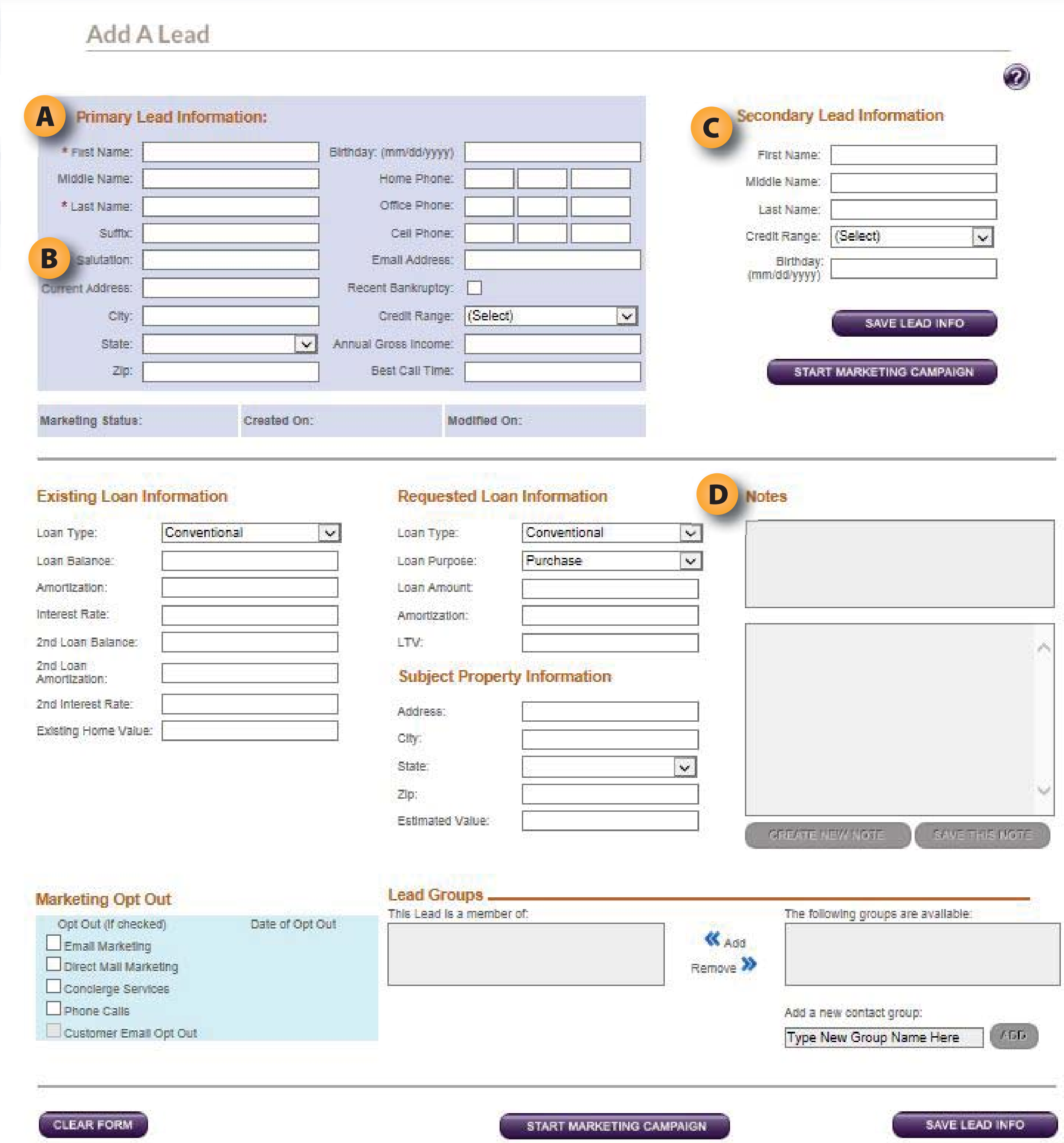


Date Created	Last Name	First Name	Office Phone	Home Phone	Cell Phone	Current Address
10/28/2013 3:20:46...	Milles	Alyson				2 School Road
10/28/2013 3:20:43...	Focht	Harley	952-949...	952-212...	952-212...	5011 36th ave s
10/28/2013 3:20:42...	Rodriguez	Michelle The...	301-513...	410-979...	410-979...	549 retreat ct #F
10/28/2013 3:20:42...	Passini	Rachel A				1620 24th St
10/28/2013 3:20:42...	Matz	Karen M	715-754...	715-460...		302 Roberts St. Apt 4
10/28/2013 3:20:42...	Whitaker	Jennifer	303-241...	303-241...	303-241...	305 S 39th St.
10/28/2013 3:20:41...	Dillon	Matthew B		571-294...		20686 Smithfield Court
10/28/2013 3:20:37...	Lenn	Melissa	920-338...	920-264...	920-264...	502 N Superior St
10/28/2013 3:20:29...	Davis	Barbara F				49 Woodcrest Avenue
10/28/2013 3:20:28...	Carls	Heidi		651-486...	651-208...	2999 Carey Heights Dr.
10/28/2013 3:20:28...	PAIXAO	CHRISTINE		208-898...		2138 W SANTA CLAR...
10/28/2013 3:20:26...	Tachovsky	Sandra L.	651-224...	952-454...		6031 North Ridge Dr
10/28/2013 3:20:24...	Rubin	Denise Lant...		612-356...		160 Commonwealth A...
10/28/2013 3:20:21...	JENNINGS	TARA				4701 W DE LA CANOA...

Leads/Campaign History

"Campaign History" provides a list of any and all campaigns you have sent to this lead. It shows their start dates and current campaign status.

"Active" – currently receiving marketing "Inactive" – marketing has been completed "Unassigned" – has not yet been marketed to



Leads/Add

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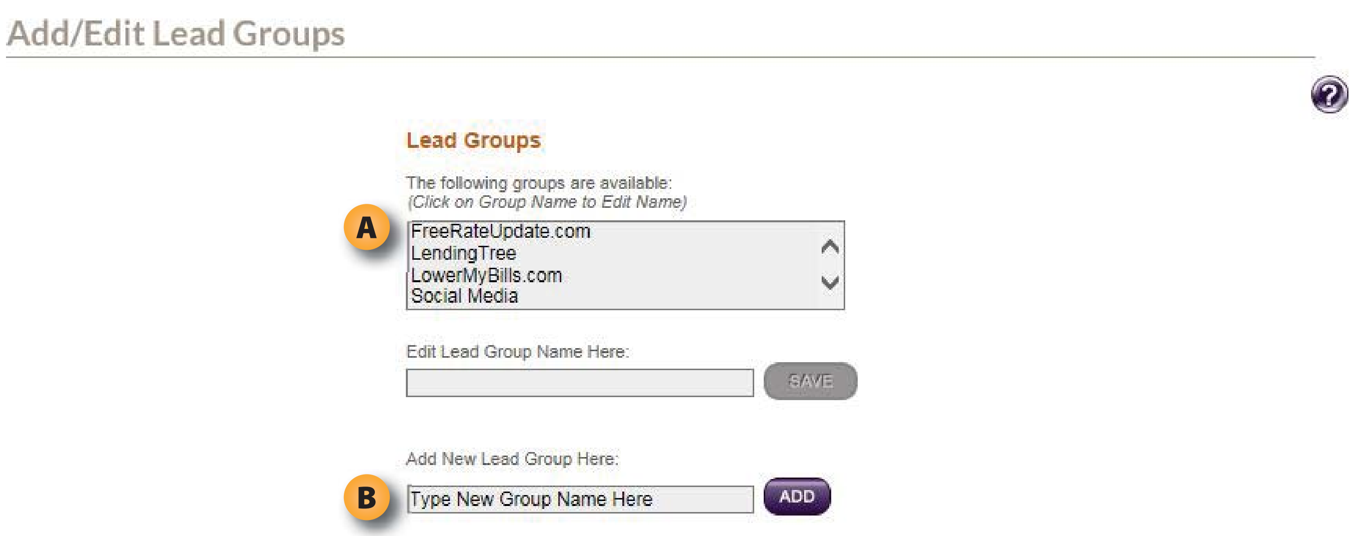
Leads/Upload lists

Click on the "Browse" button to search your computer for your list of leads you wish to upload. The file needs to be in a .csv or .xls format. You do not need to map any fields. Click on the "Upload" button and the list will be sent to us.

Helpful Tips

- If you would like your list uploaded to a specific lead group, add a column to your list named "Lead Group" and add the appropriate information to the list.
- If there are multiple "Lead Groups" within the same list, either split the list and follow the procedures above, or add a column in your file called "Lead Group" and add the appropriate information to the list.
- Lists are processed by our database department and may take up to one business day to appear in your account.
- If you have any questions or need assistance, please feel free to contact our customer support team.



Leads/(Add/Edit Lead Groups)

A. Changing Lead Group Name

If you want to change the name of a "Lead Group," select that "Lead Group" from the list. Once you click on it, the name will appear in the editing field below the list. Make any changes to the name, and click "Save."

B. Adding New Lead Group

If you want to add a new "Lead Group," click in the field that says "Type New Group Name Here," type the name for the new group, and click "Add."

Unify Your Business.

Learn how Unify simplifies and reduces the expense of:

• Business Intelligence for Managers and Loan Originators

• Robust Customer Relationship Tools

• Lead Management and Distribution

• Company Driven Marketing and Communications

• Sophisticated Business Building Tools

• Customer and Producer Retention

Contact us Today!

866-497-3224
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CrossMedia, LLC

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