



Leads



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

View/Edit Leads

The screenshot shows the 'View/Edit Leads' interface. At the top, there is a search bar (A) with 'Lead Type' and 'Other' dropdowns, a 'SEARCH' button, and 'Reset / Refresh', 'Download', 'Print', and help icons (I). Below the search bar are 'Clickable Icons' for 'New Lead', 'Create a Follow Up', 'Log A Response', 'Make an Outgoing Call', 'View Last Assigned Date', and 'View Latest Responses'. A 'Pull Out a New Lead' button (D, E) and an 'Open Lead View' button are also present. The main area is a table with columns: 'Date Created', 'Last Name', 'First Name', 'Office Phone', 'Home Phone', 'Cell Phone', and 'Current Address'. The first row is highlighted in blue (B). Callouts D and E point to the 'Pull Out a New Lead' button. Callout C points to the 'Current Address' column. At the bottom, there are buttons for 'ADD TO CONTACTS' (H), 'DELETE LEADS' (F), 'START MARKETING CAMPAIGNS' (G), and 'RESTORE GRID SETTINGS' (J). The page number is 1 of 16, and it shows 'Leads selected for management: 1' and 'Displaying leads 1 - 25 of 395'.

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.

View/Edit Lead

Lead Details **Campaign History**

A Primary Lead Information:

* First Name: Birthday: (mm/dd/yyyy)

Middle Name:

* Last Name: Home Phone:

Suffix: Office Phone:

Current Address: Cell Phone:

City: Email Address:

State: Salutation:

Zip: Credit Range:

Best Call Time:

C Secondary Lead Information

First Name:

Middle Name:

Last Name:

Birthday: (mm/dd/yyyy)

SAVE LEAD INFO

START MARKETING CAMPAIGN

Marketing Status: Active Created On: 10/28/2013 Modified On: Not Modified

Existing Loan Information

Loan Type:

Loan Balance:

Amortization:

Interest Rate:

Existing Home Value:

Requested Loan Information

Loan Type:

Loan Purpose:

Loan Amount:

Amortization:

Interest Rate:

F Notes

CREATE NEW NOTE **SAVE THIS NOTE**

D Marketing Opt Out

Opt Out (if checked) Date of Opt Out

Email Marketing

Direct Mail Marketing

Concierge Services

Phone Calls

Customer Email Opt Out

E Lead Groups

This Lead is a member of:

The following groups are available:

FreeRateUpdate.com

LendingTree

LowerMyBills.com

Social Media

Add a new contact group:

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.

View/Edit Lead

Lead Details

Campaign History

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

Add A Lead

A Primary Lead Information:

* First Name: Birthday: (mm/dd/yyyy)
Middle Name: Home Phone:
* Last Name: Office Phone:
Suffix: Cell Phone:
B Salutation: Email Address:
Current Address: Recent Bankruptcy:
City: Credit Range:
State: Annual Gross Income:
Zip: Best Call Time:

Marketing Status: Created On: Modified On:

C Secondary Lead Information

First Name:
Middle Name:
Last Name:
Credit Range:
Birthday:

Existing Loan Information

Loan Type:
Loan Balance:
Amortization:
Interest Rate:
2nd Loan Balance:
2nd Loan Amortization:
2nd Interest Rate:
Existing Home Value:

Requested Loan Information

Loan Type:
Loan Purpose:
Loan Amount:
Amortization:
LTV:

Subject Property Information

Address:
City:
State:
Zip:
Estimated Value:

D Notes

Marketing Opt Out

Opt Out (If checked)	Date of Opt Out
<input type="checkbox"/> Email Marketing	
<input type="checkbox"/> Direct Mail Marketing	
<input type="checkbox"/> Conolerge Services	
<input type="checkbox"/> Phone Calls	
<input type="checkbox"/> Customer Email Opt Out	

Lead Groups

This Lead is a member of:

The following groups are available:

Add a new contact group:

Leads/Add

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

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C. Secondary Lead Information

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

D. 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.

Upload a Lead List



Upload a list of multiple Leads in Excel (.xls, .xlsx) or (.csv) Format.

 Browse...

UPLOAD LIST

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.

Add/Edit Lead Groups



Lead Groups

The following groups are available:
(Click on Group Name to Edit Name)

A

FreeRateUpdate.com

LendingTree

LowerMyBills.com

Social Media

Edit Lead Group Name Here:

 SAVE

Add New Lead Group Here:

B

 Type New Group Name Here ADD

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!

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