unify®

Fast Start Guide

Marketing

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

Weekly Marketing Activities

Please Review Your Weekly Activities, Christopher.

B Total Active Contacts: 333
Total Sales Opportunities: $2,429,089.00
Total Listing Alerts: 42

C Total Inactive Contacts: 662
Average Sales Opportunities: $115,670.90
Total Listing Leads: 560

D Total Unassigned Contacts: 665

E Week of Sunday, November 3, 2013
Select Week: 11/03/2013 📅 ↩

F

Type	Last Name	First Name	Marketing Campaign	Event	Date	Completed
Contact	Aggasi	Andre	Uni- Post Close - 5 Years	Email	11/07/2013	☑
Contact	Alt	Ashly	Uni- Home Buyer Prospects - 6 Months	Email	11/08/2013	☐
Contact	Alt	Ashly	Post Close - 5 Years	Email	11/07/2013	☑
Contact	Alt	Ashly	Uni- Home Buyer Prospects - 6 Months	FirstMailing	11/08/2013	☐
Contact	Amay	Juan	Post Close - 5 Years	Email	11/07/2013	☑
Contact	Anderson	Becca	Post Close - 5 Years	Email	11/07/2013	☑
Contact	Anderson	Bruce D	Post Close - 5 Years	Email	11/07/2013	☑
Contact	Anderson Jr	John G	Post Close - 5 Years	Email	11/07/2013	☑
Contact	Anthony	Justin	Post Close - 5 Years	Email	11/07/2013	☑
Contact	Arendt	Jody C	Post Close - 5 Years	Call	11/07/2013	☐

G   H   I

J |◀ ◀ ━━━━━━━━━━ ▶ ▶| Page 1 of 37 (363 items)

Please select view: Show All ▼   SAVE COMPLETED ACTIVITIES

Marketing/Activities

A. Print

Click this link to print your Marketing Activities for the selected week.

B. Total Active Contacts

This number represents the total number of contacts in your database that are currently enrolled in a marketing campaign.

C. Total Inactive Contacts

This number represents the total number of contacts that at one time WERE enrolled in a marketing campaign, but are not at this time. Click on the blue link and you will be taken to a page listing all of the "Inactive Contacts" and allows you to initiate a marketing campaign to the contacts you select.

D. Total Unassigned Contacts

This number represents the total number of contacts that have NEVER been enrolled in a marketing campaign. Click on the blue link and you will be taken to a page listing all of the "Unassigned Contacts" and allows you to initiate a marketing campaign to the contacts you select.

E. Calendar Tool

Click on the calendar to select the week you would like to have displayed in the "Activity List." You may move forward or backwards to select the appropriate time frame.

F. The Activity List

The activity list displays the contact's last name, their first name, the campaign name that has activity during this period and the type of marketing event column, you can select or deselect all of the leads in the search.

G. Contact Last Name

Click on the contact's last name and you will be taken to their "View/ Edit Contact" screen. Here you may make any edits or additions you like.

H. Events

Click on the event to take you to the "Manage Contact Campaign" screen. If it was a "Mail" event, you will see the last piece that was sent. A "Call" event will show you the last piece that was mailed along with suggested discussion points. "Email" will display the email that was last sent. "Letter" will prompt you to print an editable letter from your computer.

I. Completed

This is used in conjunction with the drop down menu in the lower left hand corner and the "Save Completed" button in the lower right hand corner. Check the items you have completed and then click the "Save Completed" button. Next, using the drop down tool, select how you would like your activities to display. You may choose "Show All,""Show Completed," or "Show Incomplete."

J. Slide Bar and Page Number

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.

Marketing/Library

View Campaign Library

This page is used to view the various campaigns that are available. You cannot initiate a marketing campaign from this page as "No Contact" has been selected. To view a campaign, begin by clicking on one of the categories displayed in the Campaign tree to the left or by selecting the tile. Once you have done this, the campaigns within that category will be displayed. When you click on one of these, the campaign, along with a description and pricing, will be displayed. You may click on any image to enlarge it and close it by clicking on the red 'X' in the top right hand corner. A scroll bar is located on the right hand side of the page to allow you to view all of the campaign elements.

Marketing/Campaigns

A. Search for Contacts

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 contact grid will allow you to move from page to page of your contacts.

B. View Campaign Information

You can view a Campaign's content and schedule by clicking on the title of the campaign, which will be in blue.

C. View Contact Information

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

D. Delete Campaigns

To delete a contact's campaigns, check the box to the left on the line on which the contact appears. When you do this, the "Delete Campaigns" button will become active. Click on the "Delete Campaigns" button. You will be prompted to confirm this action. Click yes to continue. 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 contacts in the search.

E. Download Contacts

To download contacts, 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.

F. Print Contacts

To print contacts, click on the "Print" link at the top right hand side of the page.

G. 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.

Campaign Name: 1-Test Email Campaign   Campaign Start Date: 4/5/2013   Week # : 1   Campaign Status: Completed   Activity Status: N/A

A | **Campaign Schedule** | Follow Up | Notes | Email

Schedule of Events

View Event	Week #	Event Date	Event Type	Completed
Select	1	4/5/2013	Email	Yes
Select	1	4/7/2013	Email	Yes
Select	1	4/9/2013	Email	Yes
Select	1	4/11/2013	Email	Yes

Marketing/Campaigns/Manage Contact Campaign

This page is the follow up and user dashboard for each active campaign in the system. Along the top of the page you will see navigation tabs for all of the activities and information available on the page.

A. View Campaign Schedule

A convenient place to view a snapshot of the campaign schedule including detailed event information. You may jump to an event by clicking the blue "Select" link on the event row. This will jump you to the "Follow Up" tab for this event.

A Search By: [Last Name ▾] [   ] [SEARCH] ⟳ Reset **B** ⊕ Add Part **E** ⊠ Download Partner List ?

	Last Name △	First Name	Company	Active
C ☐	Johnson	Robert	Cross Media Financial	Yes
☐	Smith	Cindy	Cross Media Realty	Yes
☐	Wilson	Edward	Cross Media Insurance	Yes

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D Partner Active Status: [Yes ▾] [GO]

Marketing/Partners

About Marketing Partners

A marketing partner is someone with whom you might want to "Co-Brand" your marketing with. Examples of this may be real estate agents, financial planners, insurance agents, builders, etc. This feature allows you to add information about these people into your account so that you may select them during the campaign selection process and add their information to the marketing piece along with your own.

A. Search

Use the "Search" tool to locate specific "Marketing Partners." When you have the correct information entered into the appropriate fields, click "Search" and the results will be displayed in the table below

B. Add Partner

Click on this link to take you to the "Marketing Partner Information" screen.

C. View Partner Details

Click on the last name of any "Marketing Partner" and you will be taken to their "Marketing Partner Information" page where you may view or edit any of their information.

D. Partner Active Status

To change the "Status" of a "Marketing Partner" check the box next to their name and then select either "Yes" or "No" from the drop down menu located in the lower right hand side of the page. Click "Go" when you are satisfied with your selection. This step can be undone.

E. Download Partner List

To download your partners, 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.

A Marketing Partner Information

*	First Name:	Robert
*	Last Name:	Johnson
	Title:	Financial Planner
	Company Name:	Cross Media Financial
	Address 1:	2658 Patton Road
	Address 2:	
	City:	Roseville
	State:	MINNESOTA
	Zip:	55113
	Direct	651 426 6696
	Cell	651 653 1899
*	Email Address:	support@crossmedia-llc.com
	Web Address:	
	Active:	Yes

B Marketing Partner Photo: [ ] Browse...

Marketing Partner Logo: [ ] Browse...

Upload Images

SAVE CONTACT INFO   CLEAR FORM

Marketing/Partners/Marketing Partner Information

A. Marketing Partner Information

Fill in as much information you have about this "Marketing Partner" and click save. This information will be used on the marketing pieces when they are selected as the "Marketing Partner."

B. Upload Images

Once information about a "Marketing Partner" is saved, you may upload their photo and logo by browsing your computer for the images. Please make certain that they are high resolution images (200kb or larger and in .jpg format). Click the "Upload Images" button when you are satisfied.

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

Cross Media, LLC is an innovative provider of mortgage-lending marketing tools and technology services. We help mortgage banks, community banks, mortgage brokers and credit unions connect to their customers, communicate efficiently, and more effectively manage their relationships. Our services include software development, custom design of marketing materials and campaigns, target-marketing lists and marketing communications compliance.

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