

INTEGRATION GUIDE



Velocify Mortgage Solution

Menu Dashboard Leads Partners Campaigns

Search: Leads
 Advanced Edit
 Help & Support | Sign Out
 -- Select Field --
 Leads: ON calls: OFF

My Top Leads

Name	Status	Campaign	Last Modified Date
Janie Rowe	New	Zillow/Bob HouseSeller	Just now
Lauren Sanders	New	Lending Tree	
Jack Sanchez	Presentation Opened	Mortgage Leads Direct	Oct 1, 2016
Bob Woodward	Presentation Opened	Referral	Sep 30, 2016
Jack Browne	Presentation Forwarded	Referral	Sep 28, 2016
Danny Powell	New	Zillow	Sep 28, 2016
Lauren Sanders	New	Lending Tree	Sep 28, 2016
Jack Sanchez	Presentation Opened	Mortgage Leads Direct	Sep 23, 2016

Client Presentations last 7 days

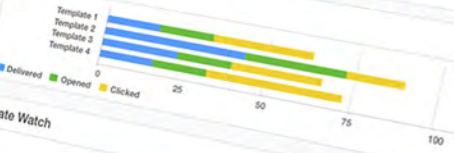
Susan Brown
TCA Presentation
Sent: 2/13/2016
Opened: Yesterday

Alex Craft
TCA Presentation
Sent: 2/02/2016
Opened: -

Mike Johnson
TCA Presentation
Sent: 2/11/2016
Opened: Two days ago

Jack Mitchell
TCA Presentation
Sent: 2/13/2016
Opened: -

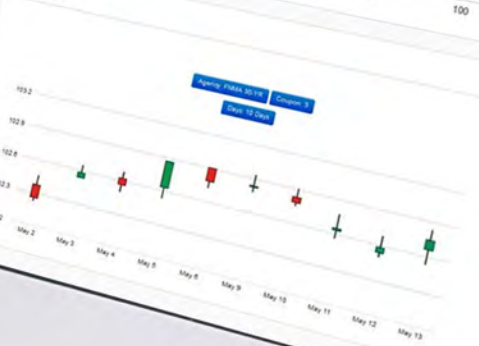
Email Templates last 90 days



Lead Sources last 90 days

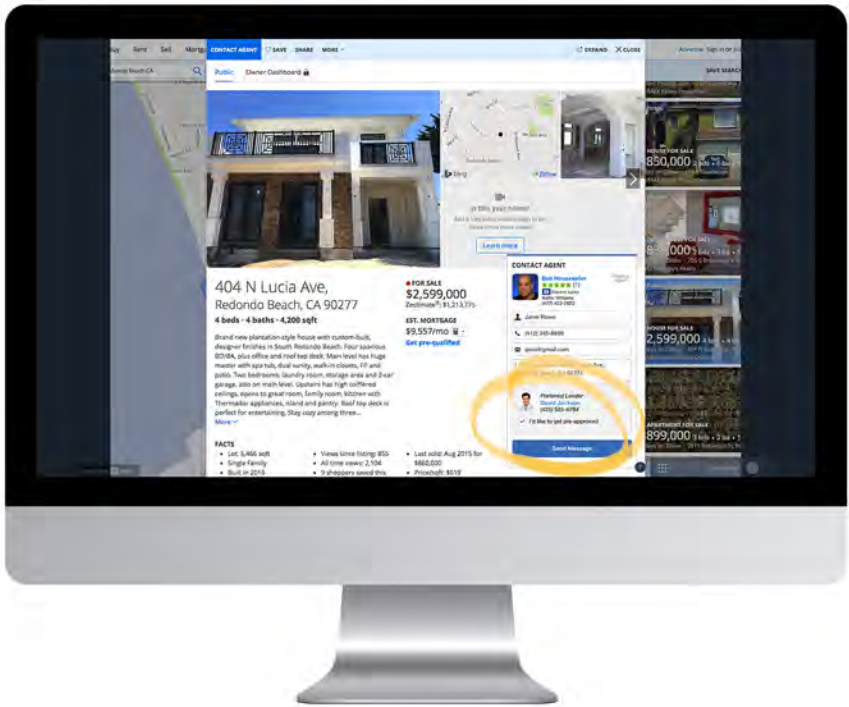


Rate Watch



HOW TO USE THE LOAN ENGAGE INTEGRATION

ZILLOW MORTGAGE COACH LEAD MANAGEMENT STRATEGY EXAMPLE



CO-BRANDED

Your information will be shown along with the Realtor, identifying you as the preferred lender.



BEAUTIFUL & INSTANT MARKETING

Once the potential client clicks on **SEND MESSAGE** on the website, an email will be sent to them. This email contains your contact information along with the Realtor's.



MY TOP LEADS

This displays the status of your top leads. **CLICK** on any lead to see more details and for additional action items.

CLIENT PRESENTATIONS

This identifies the Total Cost Analysis status of your Mortgage Coach presentations.

RATEWATCH

Your LoanEngage has RateWatch embedded to keep you up to date with the MBS market.

EMAIL TEMPLATES

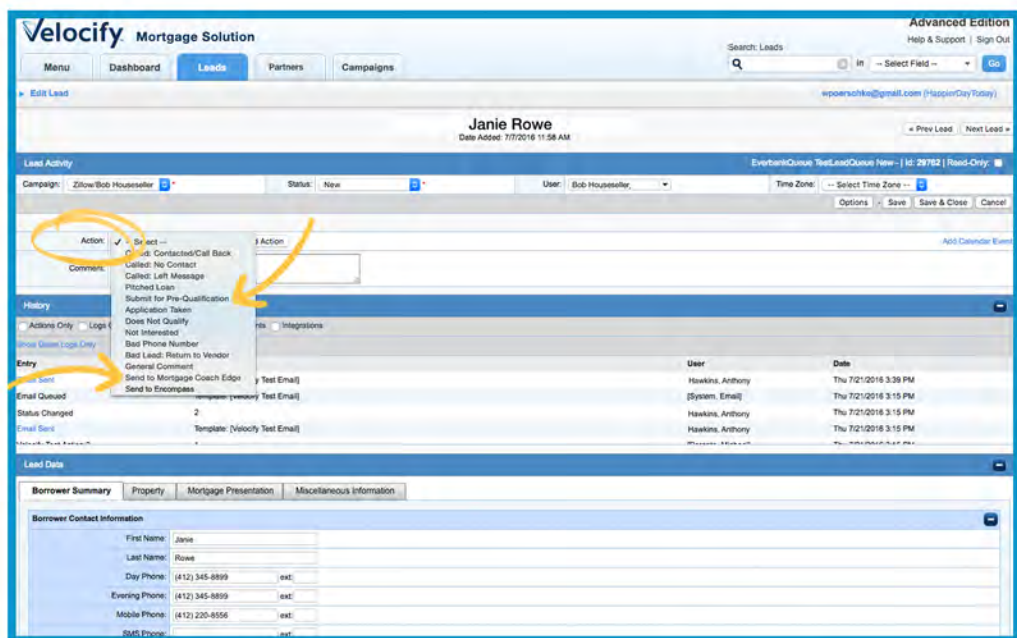
Get insights on which marketing emails are driving the most responses.

LEAD SOURCES

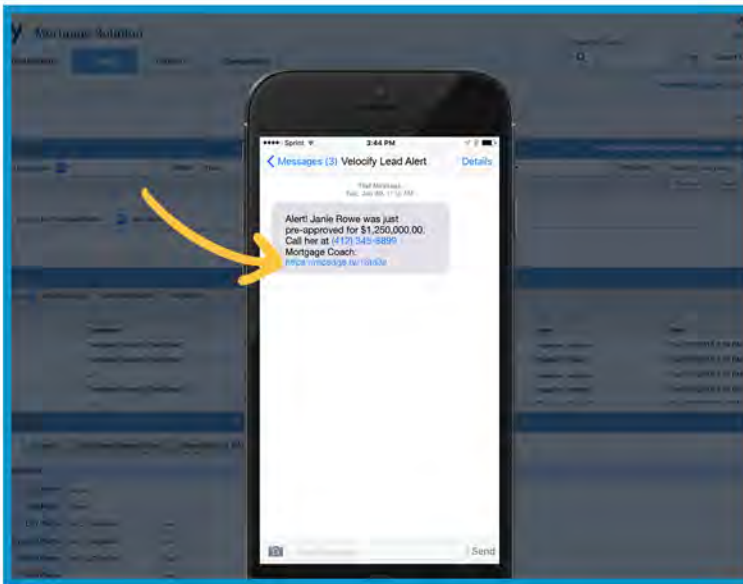
See which sources are bringing the most leads.



CLICK on **A** at the end of the row.



Under **ACTION** drop down menu at the left, **CLICK** on **SUBMIT FOR PREQUALIFICATION** or **SEND TO MORTGAGE COACH EDGE**.



SUBMIT FOR PREQUALIFICATION

Clicking on this sends a text message to the lead to let them know they are prequalified for a loan. This includes a Mortgage Coach link to see their options.

SUBMIT TO MORTGAGE COACH EDGE

LOG IN with your email and password on your phone or desktop.

ADD VIDEO and any other information.

USE the numerous email templates and campaigns to deliver your Mortgage Coach Total Cost Analysis.