

- DASHBOARD

AGENT LEADS

CLIENT ADS

B2B

DIALING PLAN

PERFORMANCE

CAMPAIGN

 BACK  LOGOUT

☐ SELECT ALL

From Date:

Lead Status:

Loan Officer:

Client:




To Date:

Campaign:

Agent:

Search

Prestige Back Office Leads (CLIENT PART)

	DATE	CLIENT	AGENT	LOAN OFFICER	NAME	AMOUNT	TERM	RATE#1	RATE#2	CASHOUT	LTV	EMPLOYEE#1	EMPLOYEE#2	D:I	FICO	DESIRED TERM	TYPE OF LOAN
<input type="checkbox"/>																	
																	
	DATE	CLIENT	AGENT	LOAN OFFICER	NAME	AMOUNT	TERM	RATE#1	RATE#2	CASHOUT	LTV	EMPLOYEE#1	EMPLOYEE#2	D:I	FICO	DESIRED TERM	TYPE OF LOAN
<input type="checkbox"/>																	
																	
	DATE	CLIENT	AGENT	LOAN OFFICER	NAME	AMOUNT	TERM	RATE#1	RATE#2	CASHOUT	LTV	EMPLOYEE#1	EMPLOYEE#2	D:I	FICO	DESIRED TERM	TYPE OF LOAN
<input type="checkbox"/>																	
																	

REPORTING



Pull Report By Staff

PULL REPORT BY INDIVIDUAL

DAILY				WEEKLY				MONTH			
MONTH ▾	DAY ▾	DATE ▾	YEAR ▾	MONTH ▾	DAY ▾	DATE ▾	YEAR ▾	MONTH ▾	DAY ▾	DATE ▾	YEAR ▾
ENTER NAME								ENTER ID			
LAUNCH				EDIT				UPDATE			

MONTH ▾ | DAY ▾ | DATE ▾

◀ April ▶

Sun Mon Tue Wed Thu Fri Sat

1 2 3 4 5 6 7

8 9 10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

29 30 1 2 3 4 5

START

DAY	
DATE	

MONTH ▾ | DAY ▾ | DATE ▾

◀ April ▶

Sun Mon Tue Wed Thu Fri Sat

1 2 3 4 5 6 7

8 9 10 11 12 13 14

15 16 17 18 19 20 21

22 23 24 25 26 27 28

29 30 1 2 3 4 5


START


AGENT REPORTING SYSTEM

MONTH						
START DATE			NAME	END DATE		
MONTH	DAY	DATE		MONTH	DAY	DATE
LEADS RECEIVED		REPLACEMENT	NET LEADS	CLOSED LEADS		CONVERSION%

AGENT REPORTING SYSTEM

MONTH						
START DATE			NAME	END DATE		
MONTH	DAY	DATE		MONTH	DAY	DATE
LEADS RECEIVED		REPLACEMENT	NET LEADS	CLOSED LEADS		CONVERSION%

ACCELERATE
MORTGAGE



QUESTIONNAIRE

THE QUESTIONNAIRE ALLOWS FOR A SMOOTH IMPLEMENTATION OF YOUR PROJECT. ALL ADS REQUIRED FOR LAUNCH ALONG WITH THE DESIGN OF YOUR WEBSITE DOMAIN IS ALL REQUIREMENT FOR A SUCCESSFUL CAMPAIGN. THIS PROCESS WILL ALLOW FOR EFFECTIVE MANAGEMENT OF YOUR AGENTS/ LEADS/ CONVERSIONS.

COPY OF YOUR LOGO		COPY OF THE MAIN WEBSITE PAGE	
PROGRAM THAT YOU OFFER			
PROGRAM		YES	NO
CONVENTIONAL			
FHA		✓	
VA			
REVERSE MORTGAGE			✓
ADJUSTABLE			
RATE TREE			
30 YEAR RATE - 660 + _____ 725+ _____			
25 YEAR RATE - 660 + _____ 725+ _____			
20 YEAR RATE - 660 + _____ 725+ _____			
15 YEAR RATE - 660 + _____ 725+ _____			
10 YEAR RATE - 660 + _____ 725+ _____			
THE ABILITY TO WAIVE THE APPRISAL FEE			
APPRISAL FEE AMOUNT		YES	NO
PHONE NUMBER FOR TRANSFER			
VELOCIFY OR LEAD 360 MAPPING/ STRING TO PROGRAM			
TWO FLYER WILL BE DESIGN FOR EMAIL MARKETING			
PROGRAM INCENTIVE			
QUESTIONS		ANSWERS	
LOWER YOUR PAYMENT		REDUCE YOUR MONTHLY BILLS AND SAVE!	
TAKE CASHOUT		RENOVATE YOUR HOME OR CONSOLIDATE DEBT	
CJAMGE UPIR ADJUSTABLE RATE TO FIXED		WITH RECORD LOW INTEREST RATES, THERE COULDN'T BE A BETTER TIME TO LOCK IN	
REDUCE YOUR LOAN		PAY OFF YOUR MORTGAGE SOONER	
ELIMINATE PRIVATE MORTGAGE INSURANCE (PMI)		POTENTIALLY REMOVE PMI COMPLETELY FROM YOUR MONTHLY PAYMENT	
PROGRAM INCENTIVE			
QUESTIONS		ANSWERS	
LOWER YOUR PAYMENT		YES	NO
TAKE CASHOUT		YES	NO
CJAMGE UPIR ADJUSTABLE RATE TO FIXED		YES	NO
REDUCE YOUR LOAN		YES	NO
ELIMINATE PRIVATE MORTGAGE INSURANCE (PMI)		YES	NO
4 - 5 MAIN FEATURES / ATTRIBUTES / SERVICES YOU'RE WILLING TO OFFER			
QUESTIONS		ANSWERS	
MATCH INTEREST RATE / FEES		YES	NO
WAIVE APPRISAL FEE		✓	
WAIVE PROCESSING FEE			
WAIVE UNDERWRITING FEE			✓
SPECIAL PRICING FOR CLOSING FEES		REDUCE BY 20% ETC.	



CLIENT REPORTING

LAUNCH

EDIT

UPDATE

MONTH | DAY | DATE

◀ April ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

START

DAY	
DATE	

MONTH | DAY | DATE

◀ April ▶

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

START

LEADS ORDER TRACKER FORM

MONTH						
START DATE			EXTENSION REQUIRED	END DATE		
MONTH	DAY	DATE	DONE BY WEEKS	MONTH	DAY	DATE
LEADS ORDERED			LEADS TO DATE	REPLACEMENT		LEADS TO COMPLETION

LEADS ORDER TRACKER FORM

WEEKLY									
START DATE			EXTENSION REQUIRED				END DATE		
MONTH	DAY	DATE	FROM:	MONTH	DAY	DATE	MONTH	DAY	DATE
			TO:	MONTH	DAY	DATE			
LEADS ORDERED			LEADS TO DATE				REPLACEMENT		LEADS TO COMPLETION

LEADS ORDER TRACKER FORM

DAILY									
START DATE			EXTENSION REQUIRED				END DATE		
MONTH	DAY	DATE	FROM:	MONTH	DAY	DATE	MONTH	DAY	DATE
			TO:	MONTH	DAY	DATE			
LEADS ORDERED			LEADS TO DATE				REPLACEMENT		LEADS TO COMPLETION

UPLOAD

DISPLAY APPLICATION

DAILY WEEKLY MONTHLY

MONTH	DATE	YEAR
START TIME	LEADS RECEIVED FIELD	END TIME
9:00 AM		9:00 PM

FIRST NAME:

LAST NAME:

CLICK TO OPEN

12345.....15

APPROVED	PENDING STILL WORKING	SALES	NOT INTERESTED	DUPLICATE	DID NOT RECEIVE	EDIT	UPDATE
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Bank - Loan Officer:

BORROWER'S CONTACT INFORMATION

First Name:

Last Name:

Telephone Number:

Secondary Number:

Email Address:

Address:

City:

State:

Zip:

LOAN DETAILS

Hi Its with a Live Transfer Call. I have on the line, his/her Mortgage Balance is

1. a) Property Type:

2. a) Mortgage Balance on 1st Mortgage:

b) interest Rate on 1st Mortgage:

c) Mortgage Term on 1st Mortgage:

d) Fixed/Adjustable:

3. a) Mortgage Balance on 2nd Mortgage:

b) interest Rate on 2nd Mortgage:

4. a) Value of Property(s):

b) Loan to Value (1.7V):

c) Desired Cash Out: Desired Loan Amount is:

d) Desired Loan Amount is:

5. a) Bankrupt, or Foreclosure:

b) Current on Mortgage Payments (12 months):

6. a) Escrow Payment:

b) Monthly Mortgage Payment:

c) Annual Property Tax:

d) Annual Property insurance:

7. a) Approximate Annual Household income:

b) Primary Employment Status:

c) Secondary (Spouse) Employment Status:

d) Debt to Income Ratio:

8. a) Fico Score:

9. a) Borrowers Primary Term:

b) The borrower is looking to:

c) Loan Type:

Brokers Data - Loan Officer:

OBTAINING SSN & DOB

So we can focus on what means the to you throughout these [Refinancing or New Purchases] process, and together create a program that fits both your short and long term goals, the goal is to create a good faith estimate that accurately and is of maximum benefit to you - the only information require to accomplish this will be your dob and that date is _____ and so that I can take a peak of credit to ensure you exactly what you will be paying monthly and what your new interest rate will be your social security number is _____ faith estimate is accurate and beneficial to you, the only remaining information required to do so is your date of birth and for me to take a peak at your credit. The date of birth is? ___ and your social insurance number? Willingness to earn your business.

CLOSING

Now [Borrower] you may have already received various quotes; however, I hope that your loyalty is not to any one particular bank, but to the best money saving option for both you and your family. My goal is to discuss various options ___ put it in a good faith estimate breaking down or competitive pricing, rates and closing fees, demonstrating my strong commitment and willingness to earn your business.

LEAD STATUS

REASSIGN LEAD TO MANAGEMENT "ISSUED CLOSING DUE TO PRICING"

FORWARD TO UPPER MANAGEMENT

1.MANAGER NAME

Email:

Send Email

ACCELERATE

MORTGAGE