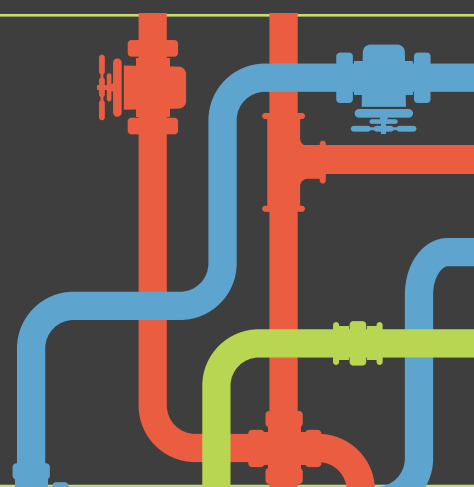# unify®

FULL SUITE CRM SOLUTION

Are you using multiple vendors? If so, cut costs and improve production with one single CRM vendor.

Save time and keep your momentum. Unify is a comprehensive, complete solution - no jumping from software to software, no searching for buried files, passwords or programs. One login, one database, one solution - it's all right there.

PIPELINE MANAGEMENT TOOL

Don't miss a beat. Access Unify from anyplace you access the web and get real-time reporting - summarized or detailed - on loan status and milestones, plus instant access to Underwriting Conditions.

YOUR RANK	TOTAL VOLUME	APPLICATIONS	TOTAL UNITS	EFFICIENCY
3 ⬆⬆	$10,457,576 ⬆⬆	96 ⬆⬆	36 ⬆⬆	74 days ⬇⬇

Today's Hot Sheet

🔴 Opportunities 👥 Customers 👤 Partners 👥 Pipeline 🔴 Hot Prospects

Alert Type	Information	Last Name	First Name	Email Address	Office Phone	Home Phone	Added
Birthday	Kyle Moyer was born on 3/19/1984	Moyer	Kyle	moyer81@gmail.com	555-800-4451	555-982-4551	06/19
Listing Alert	56 S 7092604 Taylor Young...	Young	Taylor	lyoung@gmail.com	561-571-8074	561-135-8071	04/16
Loan Active	Anniversary Date: 2/2/2009 based...	Harris	Jack	harris_jack@outlook.com	888-445-9833	888-695-3002	06/11
Rate Savings	Possible Rate Savings (0.685% on...	Richards	Angela	single_richards@gmail.com	400-742-6421	409-741-3364	12/15

LEADS MANAGEMENT - DASHBOARD

Unify's Leads Management system pulls data from lead providers and web pages and organizes it to automatically give you the information to nurture more effectively. Quickly and easily build and manage multiple lead programs from multiple sources in a single platform. Measure results, set follow up tasks or initiate communications with just a few quick clicks.

IN PROCESS COMMUNICATIONS (IPC'S)

Communicating with all stakeholders during the origination process is vital. Unify's IPC's allow companies to tailor both the workflow and the messages to keep everyone up to date and informed throughout the application process.

Unify Integrates Seamlessly With Your LOS (LOAN ORIGINATION SOFTWARE)

PRE-CLOSING → CLOSING

APPLICATION → PROCESSING → UNDERWRITING

MARKETING CONCIERGE

Automatically send communications, either direct mail or email, for specific events - holidays, rate adjustments, birthdays, closed loan. Leverage any combination of emails, greeting cards, direct mail or other communications you want - all branded with your photo, as well as company logo and content.

Unify can help you achieve: Improved conversion rates, improved ROI, higher customer retention rates and better talent retention
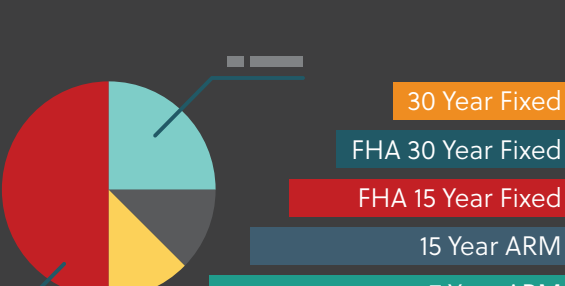
MARKETING AUDIT

Have you been through an audit before?

Compliance made simple. With this feature, staying compliant with CFBP requirements to archive ALL of your marketing communications is easy. Totally comprehensive - it gives you access to every direct mail piece, email, flyer download and Mortgage Insights report. Do your search, generate the report, save the file and give it to the auditor. It's that easy!

MORTGAGE INSIGHTS MORTGAGE ANALYSIS

This powerful sales presentation tool gives you the ability to clearly and effectively show your customers the loan options that make sense for them. With integrated tools to prepare and present various loan options in an easy to digest, visually engaging and compliant way, your loan originators will close more deals with more satisfied customers.

- 30 Year Fixed
- FHA 30 Year Fixed
- FHA 15 Year Fixed
- 15 Year ARM
- 7 Year ARM

OPPORTUNITY, LISTING & MOVE UPDATE ALERTS

Seize the opportunity right when it happens. Notifications trigger you to respond to events that could result in new transactions. Set alerts for birthdays, customer cost savings, ARM resets, P&I requirement expiration, rate savings. Keeps you on top of opportunities with daily alerts that let you know when someone in your database has listed their home for sale. Keep your database up to date and your communications going to the right place. This alerts you when someone in your database files a change of address form with the Post Office.