

FULL SUITE CRM SOLUTION



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

UNIFY CAN HELP YOU ACHIEVE:

Improved conversion rates, improved ROI, higher customer retention rates and better talent retention.

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.

UNIFY INTEGRATES SEAMLESSLY WITH YOUR LOS (LOAN ORIENTATION SOFTWARE)

LOS INTEGRATION

- Real Time Loan Updates - Integration
- Underwriting Conditions
- Audience Specific "In Process (Milestone) Communications"
- Loan Contacts Sync
- Read/Write Sync
- Web-Based 24/7 Access to Loan Info

PIPELINE MANAGEMENT

- Underwriting Conditions
- Loan Details
- Loan Schedule
- Loan Contacts
- Loan Documents
- Loan Status
- Lock Status
- Consumer and Realtor
- Milestone Alert Emails

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.

LEADS MANAGEMENT

- Lead Details
- Multiple Lead Groups
- Marketing History
- List Upload
- List Download
- 3rd Party Lead Source Integration
- Task Scheduler
- Web Site Leads
- Leads Distribution (Push, Pull, Catapult, Redistribution)
- Leads Catapult
- Integrated Phone System

YOUR RANK

3 ↑

TOTAL VOLUME

\$10,457,576 ↑

APPLICATIONS

96 ↑

TOTAL UNITS

36 ↑

EFFICIENCY

74 days ↓

LOAN OFFICER DASHBOARD

LENDING OPPORTUNITY ALERTS

- Rate Savings Alerts
- ARM Reset Alerts
- Balloon Payment Alerts
- Target Rate Alerts
- Credit Rate Alerts

CUSTOM LIFE EVENT ALERT

- Just Listed/Home for Sale Alerts
- Move Update Alerts
- Loan Anniversary Alerts
- Birthday Alerts

LOAN PIPELINE ALERT

- Lock Expiration
- Loan Approved
- Loan Declined
- Appraisal Received

REAL ESTATE PARTNER SYNC

- Import to Unify Automatically
- On Click add as Marketing Partner
- Agents added to Loan Officers Database
- Agents added to Marketing Campaigns Automatically

HOT LEADS PROSPECT MANAGEMENT INTERFACE

- Task/Appointment Scheduler
- Response Logging
- Auto Notes

CONTACT MANAGEMENT

- Unlimited Contact Groups
- Full Calendar Integration with Outlook Contact Details
- Loan History
- Marketing History
- Tracker Notes
- Loan Scenarios
- De-Dupe Service
- List Upload
- List Download
- Task Scheduler

PIPELINE MANAGEMENT

- **Underwriting Conditions**
- Loan Details
- Loan Schedule
- Loan Contacts
- Loan Documents
- Loan Status
- Lock Status
- Consumer and Realtor
- Milestone Alert Emails

MARKETING

- Editable Emails with Approval Process
- Open House Flyers—create within a couple of seconds
- Compliance Marketing Audit
- Online Store for Direct Mail – 1 piece, 50 pieces or 1000
- Perpetual Newsletters
- Direct Mail
- Unlimited Email Marketing
- Marketing Flyers
- Birthday Cards
- Holiday Cards
- Post Close Marketing
- Marketing Concierge (30 Automated Campaigns)
- Weekly Activity Reports
- Marketing History
- Campaign Management
- Marketing Partners (Realtors)
- Marketing Analytics
- Custom Graphic Design
- 700+ Marketing pieces

SERVICES

- Listing Alerts
- Move Update
- Mortgage Inquiry Alerts - Credit Alert

MORTGAGE INSIGHTS

- Advanced Mortgage Analysis
- Comparative Mortgage Analysis
- Streamlined Closing Cost Generation
- Accurate APR Calculations
- Integrated with CRM
- Consumer Friendly Reports
- Charts and Graphs
- Email Reports – Download Reports

PROFESSIONAL SERVICE

- Custom Software Development

LIVE CUSTOMER SUPPORT

- Monday-Friday 8:00 AM to 7:00 PM CST
- Data Base Assistance
- Live Training
- Training Videos

