Welcome to the Cimmaron & Mortgage Coach Integration!

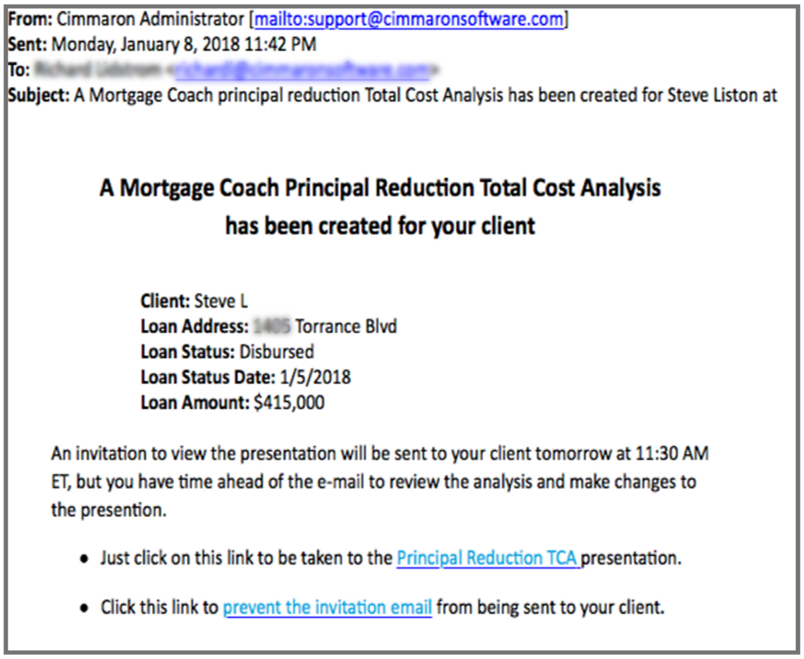
Through the seamless integration of Cimmaron and Mortgage Coach, Loan Officers have one simple strategy to increase production, build lasting clients for life and deepen Realtor relationships through execution of the Automated Mortgage Review. With this automation, Loan Officers become their own referral engine.

Automated Email Notifications

Every time an automatic email is sent, you will receive an email notification.

Click On Principal Reduction TCA to **add a video message**.

Click On prevent the invitation email to **cancel the submission**.


From: Cimmaron Administrator [mailto:support@cimmaronsoftware.com]
Sent: Monday, January 8, 2018 11:42 PM
To:
Subject: A Mortgage Coach principal reduction Total Cost Analysis has been created for Steve Liston at

A Mortgage Coach Principal Reduction Total Cost Analysis has been created for your client

Client: Steve L
Loan Address: Torrance Blvd
Loan Status: Disbursed
Loan Status Date: 1/5/2018
Loan Amount: $415,000

An invitation to view the presentation will be sent to your client tomorrow at 11:30 AM ET, but you have time ahead of the e-mail to review the analysis and make changes to the presentation.

- Just click on this link to be taken to the Principal Reduction TCA presentation.
- Click this link to prevent the invitation email from being sent to your client.

Once you receive the email notification with the link to the Principal Reduction TCA for a past client, you will have **24 hours** to add your own customized video narration, make edits to the presentation, or cancel delivery of the Automated Mortgage Review for that client.

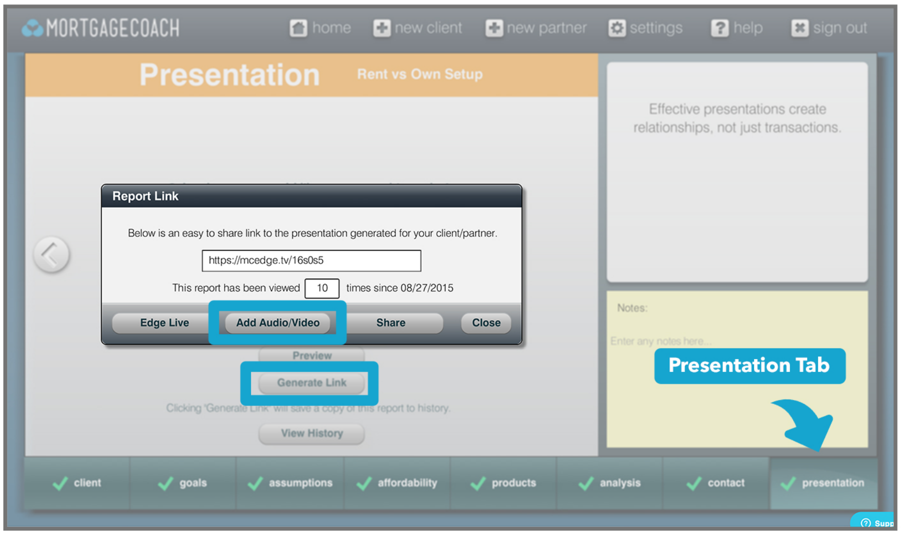
How to Add Video on Desktop

Login to your account at edge.mortgagecoach.com. **Double click on** a client or report.

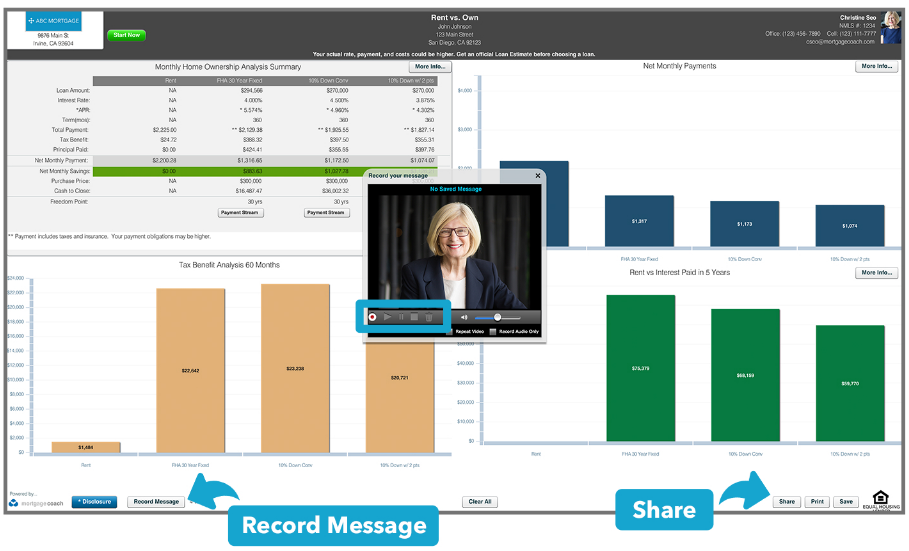
On the **Presentation** tab, **check** your report info as you click through with the left and right arrows.

On the last page, **Click On** **Generate Link**.

In the resulting pop-up, **Click On** **Audio/Video**.



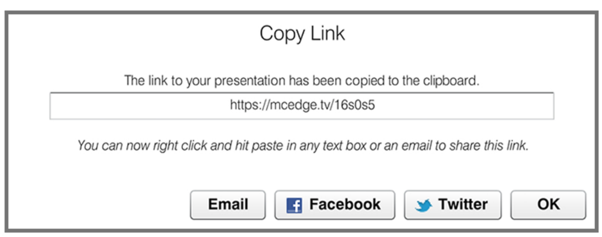
On the resulting page, **Click On** **Record Message** at the bottom left of your screen.



Record your video in the resulting pop-up.

Click on the stop button when finished. **Click on X** of the pop-up, and your video will be **saved**.

Share your report with the new video, by **clicking on** Share at the bottom right. **Send** the link to your clients.



How to Add Video on Mobile

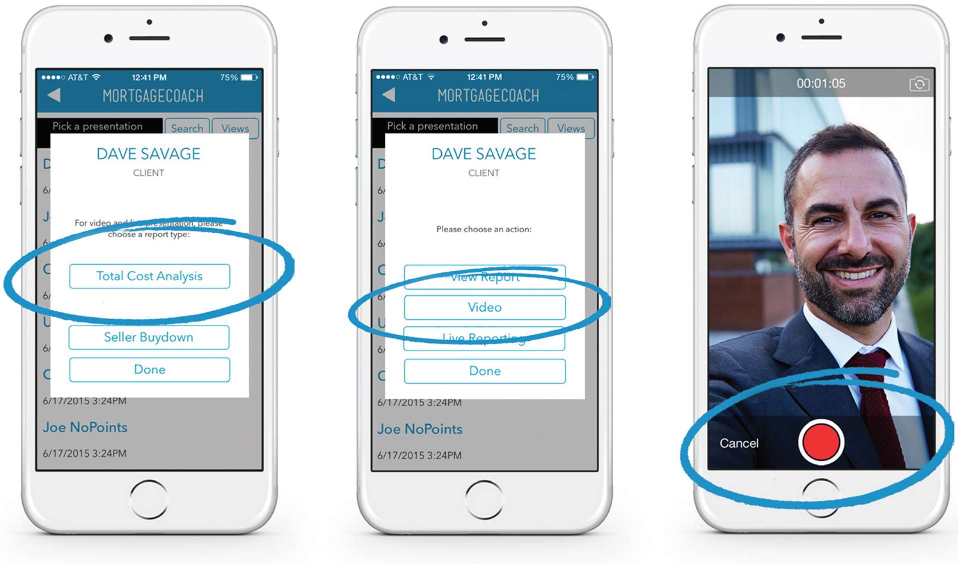
Log in to your Mortgage Coach account on the mobile app.

Click On **Clients**. Then **choose** your client or report.

Click On **Total Cost Analysis** on the pop-up.

Click On **Video**.

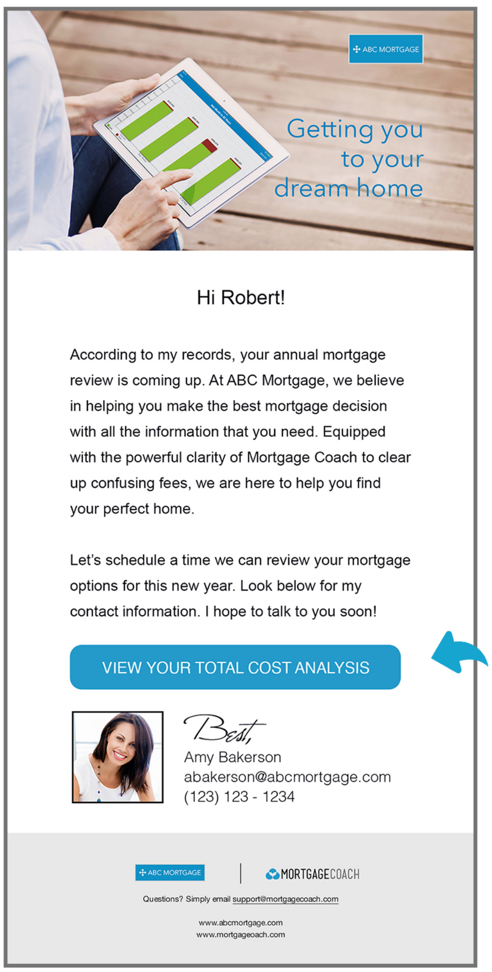
Record your video.



Customer Generated Emails:

Annual Mortgage Review

Here is a sample email, that is sent to customer through the Principal Reduction Payment Campaign.



Hi Robert!

According to my records, your annual mortgage review is coming up. At ABC Mortgage, we believe in helping you make the best mortgage decision with all the information that you need. Equipped with the powerful clarity of Mortgage Coach to clear up confusing fees, we are here to help you find your perfect home.

Let's schedule a time we can review your mortgage options for this new year. Look below for my contact information. I hope to talk to you soon!

VIEW YOUR TOTAL COST ANALYSIS

Best,
Amy Bakerson
abakerson@abcmortgage.com
(123) 123 - 1234

ABC MORTGAGE | MORTGAGECOACH

Questions? Simply email support@mortgagecoach.com

www.abcmortgage.com
www.mortgagecoach.com

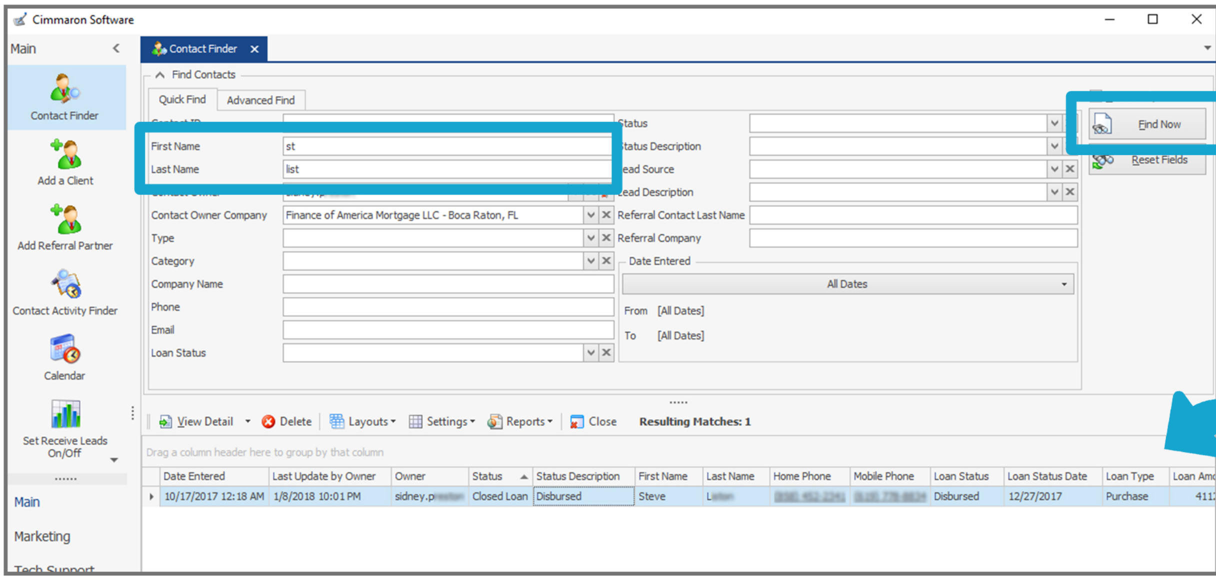
The customer would click here to review their Total Cost Analysis

How to create an On-Demand Mortgage Review

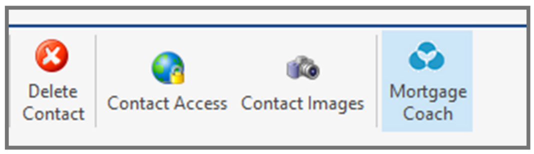
Type in the customer's first and last name, under **Contact Finder**.

Select **Find now**. The most recent funded loan will display with the search results.

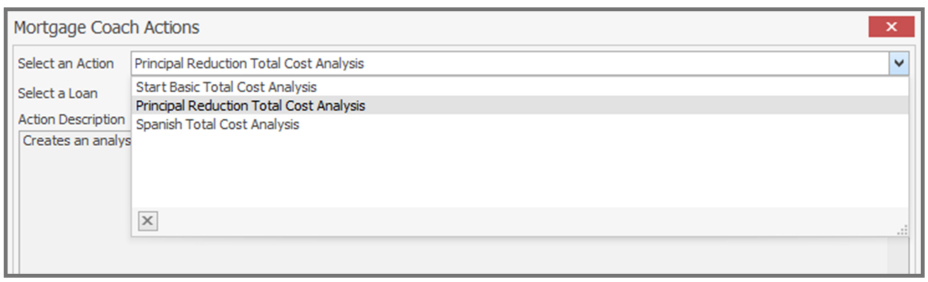
Choose the loan.



On the Contact Detail screen, **Click on** the Mortgage Coach button, located at the top right.

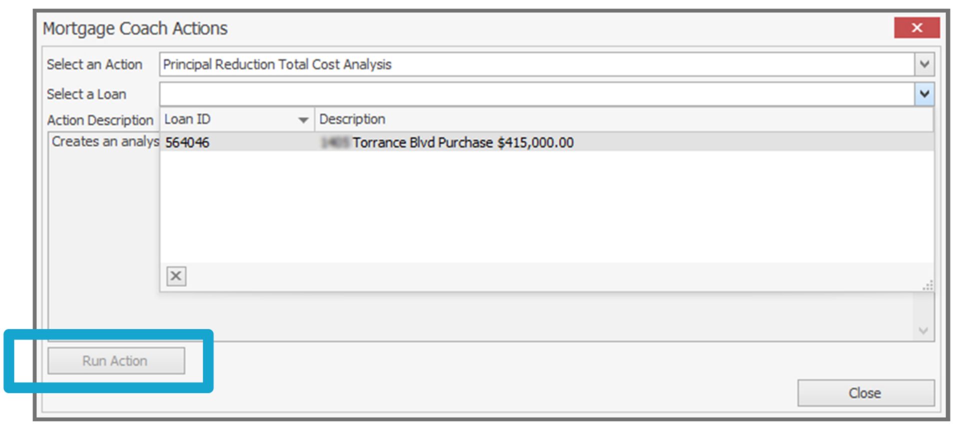


Select **Principal Reduction Total Cost Analysis** under the drop-down menu.



Select a loan.

Click **Run Action**.



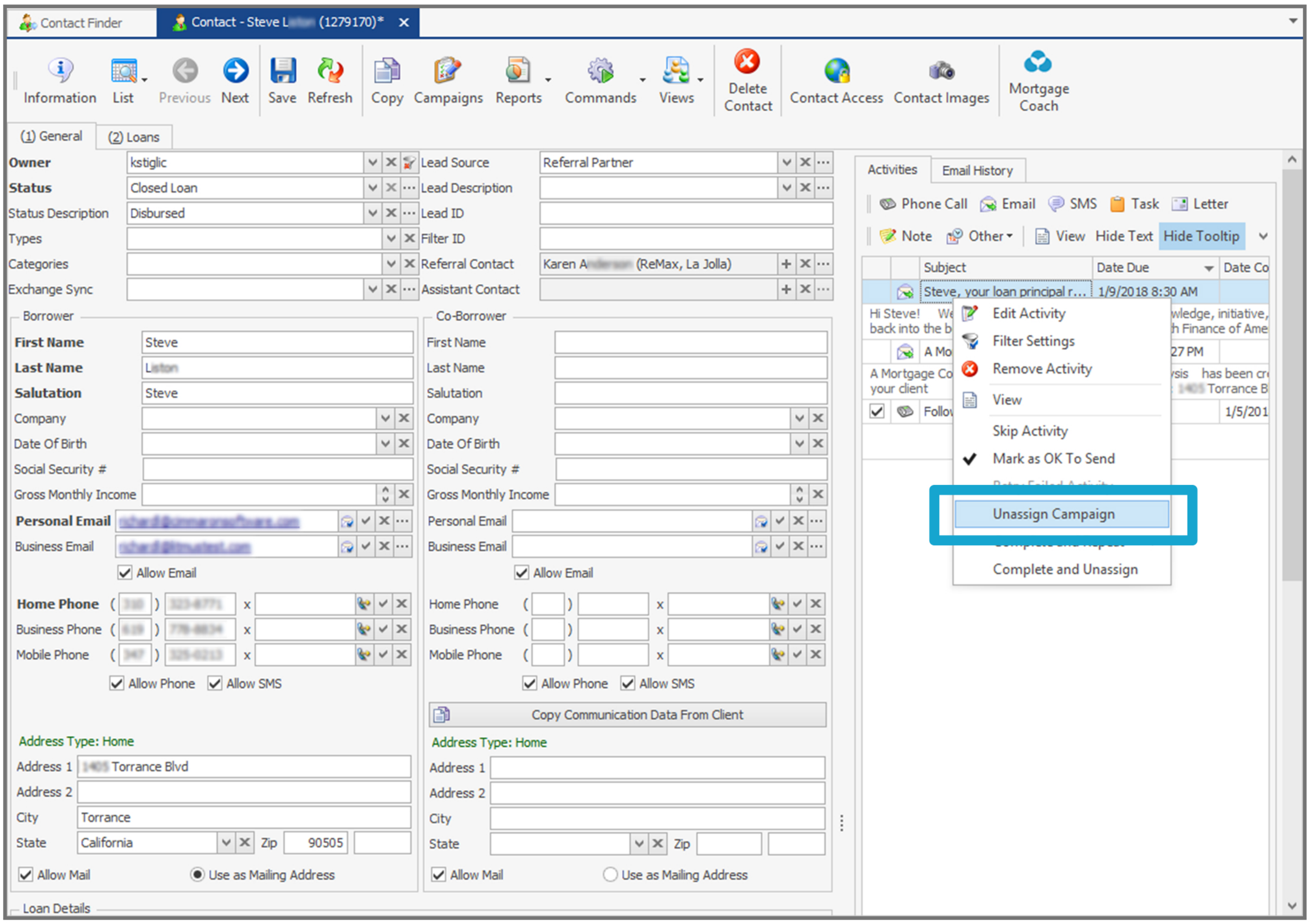
Once this is done, you will see the pending email to the customer under the **Activities** tab, under your client information.

On-demand Mortgage Review presentations that are created will generate a customer email **within 1 hour**.

How to cancel an email

Right click on the email under the **Activities** tab, under the Contact's info tab.

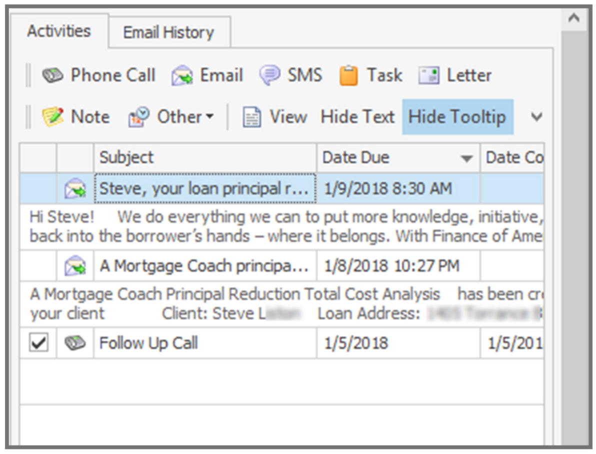
Click on **Unassian Campaign**.



How to Delay an Email

Click on on the email under the **Activities** tab, under the Contact's record tab.

On **Edit Activity**, **Adjust** the date and time as desired.



Click **OK**, at the bottom right.

Click on **Save,** located at the tob bar.