

# Quick Start Guide

**Credit Money Machine Net**

**Or**

**How to Become a Credit  
Repair Expert in One Day**

If you need assistance or find an error in this guide, or if you'd like to suggest an addition to this guide, just post a Trouble Ticket at [www.LMRHELP.com](http://www.LMRHELP.com)

This guide assumes that Templates are installed in the software (when running a trial, the Templates and Contracts are not installed). Contact support to get your Templates installed.

Our goal is your complete satisfaction.

Thank you.

LMR International, Inc.  
Support Team

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## REGISTERING CREDIT MONEY MACHINE NET

When you open the software you will see the Menu Screen.

If you are under a trial, simply click ENTER



And then CONTINUE.

If you are a client and you had received a Registration PIN then after clicking ENTER click the PIN REGISTRATION button and you will be taken to the registration screen.

REGISTRATION FORM

Help

Back

**During your trial period you should not have to register.**  
If you are still within your trial period, please hit back now, and use the button labeled "Enter" to access the program.

Version (0.) 01-31-2012-1 AAA-BBB-CCC 135529981    Key: **135529981** [COPY KEY](#)

After you have purchased / leased our software, you will receive your registration PIN.

\* Full Name:

\* Company Name:

\* Your Email:

\* Your Phone:

\* PIN Number:

To register your software enter the data in the fields above and click the RED button.

1

CLICK HERE TO REGISTER. THE  
PASSWORD WILL BE  
RETRIEVED AUTOMATICALLY.  
DO NOT NEED TO WAIT JUST  
ENTER THE PROGRAM  
NORMALLY

PASSWORD

[GRAB INTERNET  
PASSWORD](#)  
[VALIDATE  
PASSWORD](#)  
[SEE ONLINE  
PASSWORD](#)

To contact support go to [www.LMRHELP.com](http://www.LMRHELP.com) by clicking here

Enter all requested information fields and click the RED button. Note that you need to be connected to the Internet to retrieve the password.

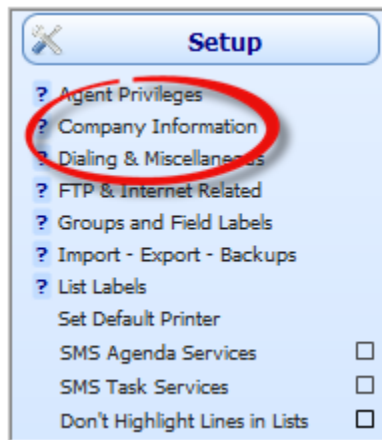
Once you click the RED button you will receive a confirmation at the right side of your screen and you can proceed inside the program. You DON'T have to wait to receive the password that will be done later automatically.

# ENTERING BASIC COMPANY INFORMATION

When you install the software for the first time, before being directed to the main screen, you will be displayed a section where you have to enter your company's basic data.

In the event that you have several companies to use in the software, you can go to SETUP.

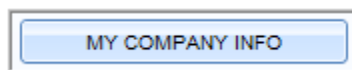
Click Company Information under the Setup tab from the main screen (Level 4 and 5).



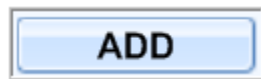
Or by directly clicking the Setup icon from Levels 1 and 3 of the software



Once in the Setup, click the MY COMPANY INFO button.




In the Company Information section, click the ADD button at the right side of the screen.



At the center of the screen are company data fields where you have to enter the information about the company.

CONTACT NAME:	<input type="text"/>	
COMPANY NAME:	<input type="text"/>	SN: <input type="text"/>
CONTACT TITLE:	<input type="text"/>	
ADDRESS:	<input type="text"/>	
CITY:	<input type="text"/>	
STATE:	<input type="text"/>	ZIP CODE: <input type="text"/>
COUNTRY:	<input type="text"/>	
CONTACT PHONE:	<input type="text"/>	
CONTACT FAX:	<input type="text"/>	
EMAIL:	<input type="text"/>	
WEBSITE:	<input type="text"/>	
EBAY ID:	<input type="text"/>	
PAYPAL EMAIL:	<input type="text"/>	
TAX PERCENTAGE:	<input type="text"/>	Used In Invoices When Printing Invoices Print <input type="text" value="1"/> Copies By Default Invoice Freight Is Taxable <input checked="" type="checkbox"/>
FEDERAL ID:	<input type="text" value="TAX ID"/>	
STATE ID:	<input type="text"/>	
LOCAL ID:	<input type="text"/>	
TAX EXEMPT NUMBER STATE:	<input type="text"/>	
TAX EXEMPT NUMBER COUNTY:	<input type="text"/>	
TAX EXEMPT NUMBER CITY:	<input type="text"/>	
COMPANY SLOGAN:	<input type="text"/>	
COMPANY POLICY/GUARANTEE:	<input type="text" value="Buyer agrees to pay total amount above according to Cardholder"/>	
NOTES:	<input type="text" value="REPLACE WITH YOUR INFO"/>	

**LOGO**




**IMPORT LOGO**

You can paste any picture that you have in the clipboard. Just right click into the field and select paste or you can import an image by clicking the button below.

This Picture will be used as logo of Invoices

PASTE YOUR LOGO OR LETTERHEAD BELOW



**IMPORT LOGO**

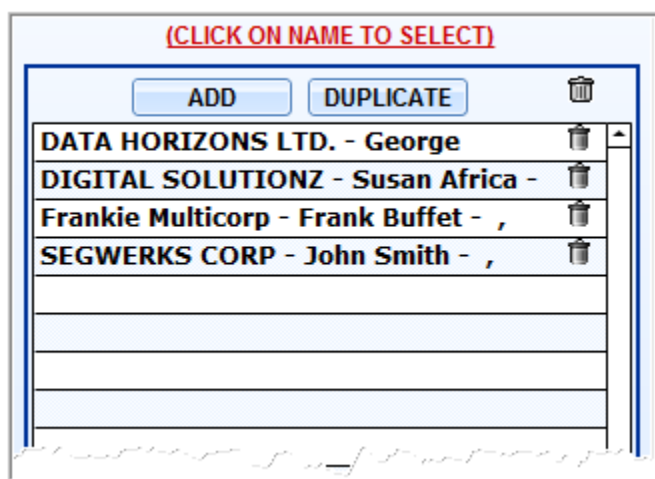
You can paste any picture that you have in the clipboard. Just right click into the field and select paste or you can import an image by clicking the button at left. 72 x 54 Points

CURRENCY CODE:

## SELECTING DEFAULT COMPANY

From your list of companies in the software, you can have only company to be selected as default. This means that the selected company will be the one that will be used in some parts of the software where a company data is needed.

To assign a company, select from the list of companies at the right side of the screen.



(CLICK ON NAME TO SELECT)	
ADD	DUPLICATE
DATA HORIZONS LTD. - George	
DIGITAL SOLUTIONZ - Susan Africa -	
Frankie Multicorp - Frank Buffet - ,	
SEGWERKS CORP - John Smith - ,	

Once a company is selected, the name of the selected company will reflect in the field as shown in the figure below.



ASSIGN CURRENT AS DEFAULT COMPANY	SEGWERKS CORP	John Smith
-----------------------------------	---------------	------------

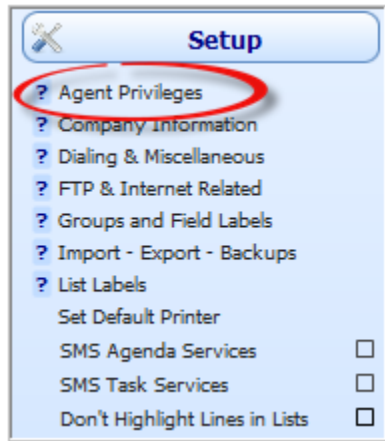
Notice the button beside the field. To assign the company reflected in the field, just click the ASSIGN CURRENT AS DEFAULT COMPANY button.

## ENTERING BASIC AGENT INFORMATION



To enter basic agent information in the software, go to SETUP.

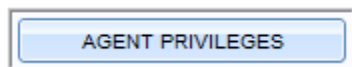
Click Agent Privileges under the Setup tab from the main screen (Level 4 and 5).



Or by directly clicking the Setup icon from Levels 1 and 3 of the software



Once in the Setup, click the AGENT PRIVILEGES button.



Click the Add button to add an agent.



Then, fill in the basic data of the agent in the provided section as shown in the figure below.

Created: 04/26/12 Agent Information Modified: 04/26/12

Copy ID Name AGENT P

Company

Address

City State

Zip Code MAP

Phones

Fax Cell

Email

Level Of Use 1 ? Allow Self Change ☒ Rank AGENT

URL WHOIS Alexa DNS

Referrals Position

Status ACTIVE Salary

Password CHANGE PASSWORD See Only Privates ☐ ? ☐

IP Address Logged for IM ☐ LOG OUT

HESK Username Password

Notes

User Defined Fields

One of the most important data to fill in this section about the agent is the level of use. The level determines what level the agent can only access in the software.

Level Of Use

1

2

3

4

5

Also indicate the RANK of the agent in using the software. There are three ranks provided with the Administrator being the highest rank.

A dropdown menu for selecting a rank. The menu is open, showing three options: AGENT (selected), EXECUTIVE, and ADMINISTRATOR. The label 'Rank' is visible to the left of the dropdown.

## REQUEST PAYMENT

A form for requesting payment. It includes a 'Company' field, an 'E-mail' field, a 'Currency' dropdown set to 'USD', and a 'Payments by' button with the PayPal logo.

In the case where the agent requests payment, you can use this area of the Agent Privileges. You can do this if the agent requests for payment through PayPal.

Enter in the Company field the company that you want the agent to see when receiving the payment. Also, enter in the Email field your email that you have in PayPal.

## ALLOWED FIELDS

To control the agent's access to certain agent information fields in the software, check mark the check box of the fields that you don't want the agent to access.

A form titled 'Agent Selected: AGENT' with a sub-header 'DON'T ALLOW TO ENTER IN: C S'. It contains a table with columns for 'FIELDS', 'EMPTY', 'MODIFY', and 'MODIFY (unless empty)'. The table lists various fields like First Name, Last Name, Company Name, Address, City, State, Zip Code, Country, Phone 1, and Phone 2. To the right of the table, there is a list of actions: Contacts Enter, Contacts Add, Contacts Modify, Contact-Email Delete, Agenda, Advertising Center, Agent Metrics, CC Analyzer, Checks, Credit Repair, Data Analysis, Debt Settlement, and Domains Manager. Each action has a checkbox next to it.

# CLIENTS AND PROSPECTS

## ADDING A NEW CLIENT

In Credit Money Machine Net, there are five *use levels* that show different features of the program being Level 5 the most advanced of them.

In all of them to add a new client (or contact) just click the Plus Icon at the top left of the Main Screen.



Or the Add Contact button in Level 4.



Enter the basic information for this client such as its name, address, phone number, etc. In this case, Level 5 is used as shown in the contact information section below.

**Contact Information** Compare Duplicates Undo

Name: Portia Mcfann P P \$

Company: Beachcomber Realty P D

Address: 4891 Pacific Hwy P

City: San Diego State: CA R

Zip Code: 92110 Z+4 Country: San Diego MAP R

Phones: (858) 294-0682 D On

Fax: (858) 294-1695 D Cellular Off

1 E-mail: portia@mcfann.com D

Templates: NONE SELECTED FAX

URL: http://www.portiamcfann.com Whois Alexa P G

Other Contacts:

Other E-mails:

To enter his Social Security and Date of Birth (D.O.B.) press and **hold** the SHIFT key and then CLICK on the Task Manager icon at the top of the screen.



The User Defined Fields area will open in the center of the screen and then you can enter the Social Security and D.O.B. in User Defined Fields TEXT and in the User Defined Fields DATE

The screenshot shows the 'User Defined Fields' application window. It features a 'TEXT' section with ten input fields, each accompanied by a red circular icon and a blue 'S' button. Below this is a 'NUMBER' section with a calculator interface, including a '+' sign, a 'Total =' field, and a table with columns 'C', 'T', and 'A'. The 'DATE' section includes a date picker showing '01/01/75', an 'Age: 37' display, and a 'Capricorn' astrological sign. A 'Picture' section contains a large empty box. At the bottom, there are fields for 'Twitter ID:' and 'Facebook URL:', and a 'Client Valuation' button.

Be sure to format the Social Security in the way you want to appear in letters. The format of date should be entered like 01/01/1960 (4 digits for the year).

**Notice** that when you enter the D.O.B. you can see the age and astrological sign of the client useful for small talk.

## FINDING CLIENTS (QUICK FIND)

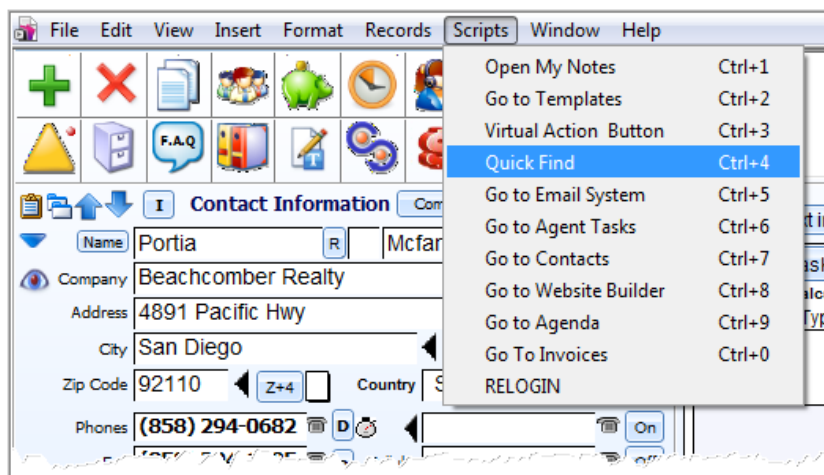
To find clients from the whole database or selected database of clients, click on the Find Contacts button on Levels 1 and 4 of the software



Or the Find button on Levels 2, 3 and 5 of the software



Or the Quick Find link under the Scripts menu on Levels 4 and 5



Once the Find is clicked, a windows dialog will pop up where you can enter the query of information on the client/s you want to find.

Quick Find and From Selected searches in First Name, Last Name, Company , Phone Numbers, Keywords, Product Codes, URL, Referrals, Related to, State, E-mail, Keywords and Contact ID

Previous Search

or Type New Search

In the search field from the windows dialog, you can enter any query of information for the system to filter. Note that you can enter into the field different query of information at the same time (always put a space in between distinct queries)

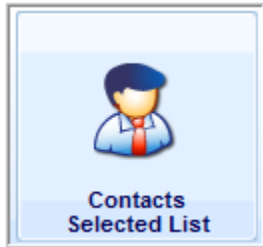
Once the query is entered, click Quick Find to search for clients from the database of all clients in the software and automatically, the software will display the search result in the following screen:

CONTACTS SELECTED - FOUND LIST										
First Name	Last Name	Company Name	TZ	ST	Phone 1	URL	E-mail	Q	Omit	🗑
Andrew	Fenstermacher	Shafer Commercial Seating Inc	FL		(850) 584-7434	http://www.andrewfenstermacher.com	andrew@fenstermacher.com	1	Omit	🗑
Gracie	Riskalla	Jessup, Richard A Esq	CA		(916) 344-7735	http://www.gracieriskalla.com	gracie@riskalla.com	1	Omit	🗑
Shirley	Keams	Transport Workers Un Afl Cio	MA		(508) 228-6114	http://www.shirleykeams.com	shirley@keams.com	1	Omit	🗑
Willie	Coughenour	Adams Rib Rstrnt At Norwalk	WV		(304) 422-8589	http://www.williecoughenour.com	willie@coughenour.com	1	Omit	🗑
Antionette	Shoobridge	Dolfin International	FL		(305) 624-9608	http://www.antionetteshooobridge.com	antionette@shoobridge.com	1	Omit	🗑
Ann	Senff	Travelodge Santa Barbara Beach	CA		(909) 923-0954	http://www.annsenff.com	ann@senff.com	1	Omit	🗑
Lauren	Langenbach	Albright, David F Esq	WA		(425) 745-5517	http://www.laurenlangenbach.com	lauren@langenbach.com	1	Omit	🗑
Julia	Cokins	Ati Title Company	GA		(404) 266-1124	http://www.juliacokins.com	julia@cokins.com	1	Omit	🗑
Ashley	Kilness	Criterium Day Engineers	TX		(972) 416-8588	http://www.ashleykilness.com	ashley@kilness.com	1	Omit	🗑
Jules	Kellerhouse	Apt Guid Ormq Cnty Long Bch	OH		(937) 294-6534	http://www.juleskellerhouse.com	jules@kellerhouse.com	1	Omit	🗑
Marilyn	Kleine	Alitalia Airlines	NE		(402) 341-8233	http://www.marilynkleine.com	marilyn@kleine.com	1	Omit	🗑
Jeromy	Dirksen	Automatic Mach Products Co	CA		(562) 868-3418	http://www.jeromydirksen.com	jeromy@dirksen.com	1	Omit	🗑
Abdul	Begum	Hirich, Thomas H Esq	NY		(718) 522-7615	http://www.abdulbegum.com	abdul@begum.com	1	Omit	🗑
Jamey	Cellar	World Const & Parliament Assn	FL		(850) 434-4388	http://www.jameycellar.com	jamey@cellar.com	1	Omit	🗑
Alfonso	Canerday	Cirrus Logic Colorado	NJ		(732) 937-8343	http://www.alfonsocanerday.com	alfonso@canerday.com	1	Omit	🗑
Brooke	Mondelli	Sands Beach Club All Ste Resrt	PA		(717) 741-3987	http://www.brookemondelli.com	brooke@mondelli.com	1	Omit	🗑
Angelica	Berkenbile	B D Holt Co	MD		(410) 252-6645	http://www.angelicaberk.com	angelica@berkenbile.com	1	Omit	🗑
Ashley	Coneway	Pearle Vision Express	PA		(610) 354-6047	http://www.ashleyconeway.com	ashley@coneway.com	1	Omit	🗑
Van	Sprewell	Asia Pacific Technotrade	TX		(915) 593-7646	http://www.vansprewell.com	van@sprewell.com	1	Omit	🗑
Quinn	Prazak	Am Interntl	CA		(916) 363-9562	http://www.quinnprazak.com	quinn@prazak.com	1	Omit	🗑
Antionette	Andree	Syring Wayne Ins Aqcy Inc	HI		(808) 488-7186	http://www.antionetteandree.com	antionette@andree.com	1	Omit	🗑
Alfred	Fines	Saurer Txtl Systems Charlotte	MT		(406) 232-7958	http://www.alfredfines.com	alfred@fines.com	1	Omit	🗑
Nicholas	Engelson	Apollo Glass Co	CO		(303) 499-1368	http://www.nicholasengelson.com	nicholas@engelson.com	1	Omit	🗑
Alecia	Krance	Lenweaver, Thomas E Esq	PA		(215) 735-0485	http://www.aleciakrance.com	alecia@krance.com	1	Omit	🗑
Ivan	Cimaglia	Surveying And Mapping Inc	CA		(510) 429-4828	http://www.ivancimaglia.com	ivan@cimaglia.com	1	Omit	🗑

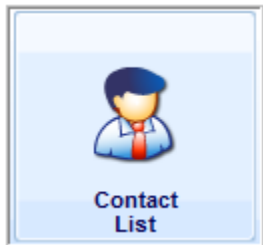
The selected list of clients/contacts can also be displayed using the List button beside the Find button from the main screen of the software.



Or the Contacts Selected List button in Level 1



Or the Contacts List button in Level 2



## **DELETING CONTACTS**

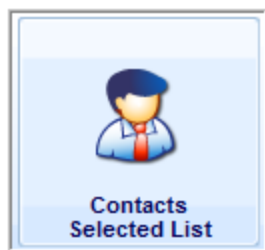
There are two ways to delete contacts. One is by deleting them one by one using the delete button directly from the main screen.



Another way is by displaying all the contacts in a list first and either delete them one by one or delete them in a group directly from there.

To do this, click CONTACTS SELECTED LIST button on Levels 1 or 2 of the software





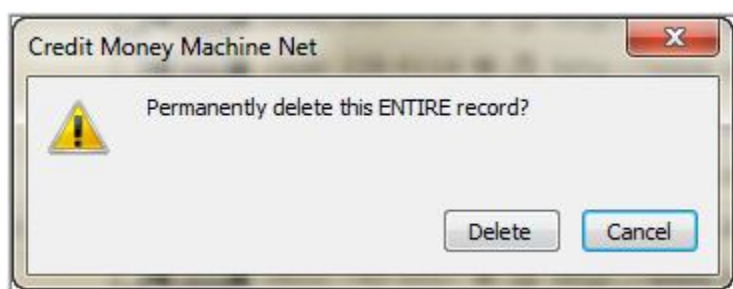
Or the LIST button on Levels 3, 4, or 5



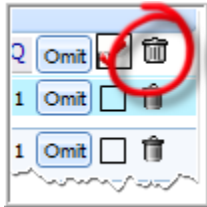
## DELETING CONTACTS FROM LIST

First Name	Last Name	Company Name	TZ	ST	Phone 1	URL	E-mail	Q	Omit	✓	✗
Andrew	Fenstermacher	Shafer Commercial Seating Inc	<input type="checkbox"/>	FL	(850) 584-7434	http://www.andrewfenste	andrew@fenstermacher.co	1	Omit	<input type="checkbox"/>	<input type="checkbox"/>
Gracie	Riskalla	Jessup, Richard A Esq	<input type="checkbox"/>	CA	(916) 344-7735	http://www.gracieriskalla.	gracie@riskalla.com	1	Omit	<input type="checkbox"/>	<input type="checkbox"/>
Shirley	Keams	Transport Workers Un Afl Clo	<input type="checkbox"/>	MA	(508) 228-6114	http://www.shirleykeams.	shirley@keams.com	1	Omit	<input type="checkbox"/>	<input type="checkbox"/>
Willie	Coughenour	Adams Rib Rstrnt At Norwalk	<input type="checkbox"/>	WV	(304) 422-8589	http://www.williecoughen	willie@coughenour.com	1	Omit	<input type="checkbox"/>	<input type="checkbox"/>
Antionette	Shoobridge	Dolfin International	<input type="checkbox"/>	FL	(305) 624-9608	http://www.antionettesh	antionette@shoobridge.co	1	Omit	<input type="checkbox"/>	<input type="checkbox"/>
Ann	Senff	Travelodge Santa Barbara Beach	<input type="checkbox"/>	CA	(909) 923-0954	http://www.annsenff.com	ann@senff.com	1	Omit	<input type="checkbox"/>	<input type="checkbox"/>

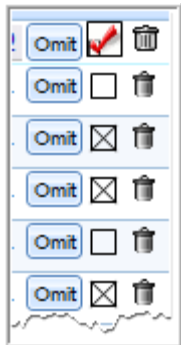
To delete contacts from the list **ONE BY ONE**, just click the GARBAGE BIN icon of the contact. Once the icon is clicked, you will be prompted with the windows dialog as shown below.



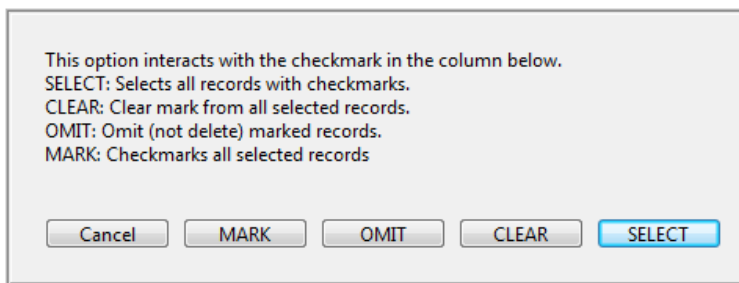
In the case where you don't want this to pop up every time you delete a contact, just click the GARBAGE BIN icon on top of all the same icons on the column.



To delete contacts from the list **BY GROUP**, mark the checkbox of the contacts that you want to delete at the same time.



**Note** To mark all the contacts on the list, click the checkbox with a check from the checkbox column and select MARK.



Once, the group of contacts to be deleted are marked, click the DELETE CONTACTS button.



## **DUPLICATING CONTACTS**

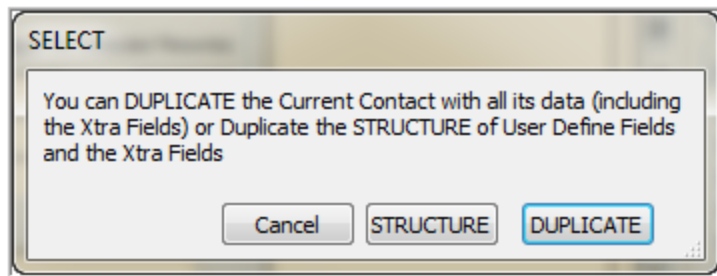
To duplicate the current contact, click the green “honeycomb” icon at the top left of the main screen. That is if, you are in Levels 1 or 3.



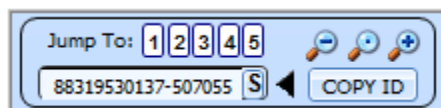
If you are in Level 4 or 5, click the duplicate icon inside the Contact Information section of the main screen.



Then select the kind of duplicate that you want from the pop-up windows dialog as shown below.



**Note** The duplicate contact has a different contact ID to distinguish it from the original one. The Contact ID can be found at the lower right part of the main screen on Levels 4 and 5.



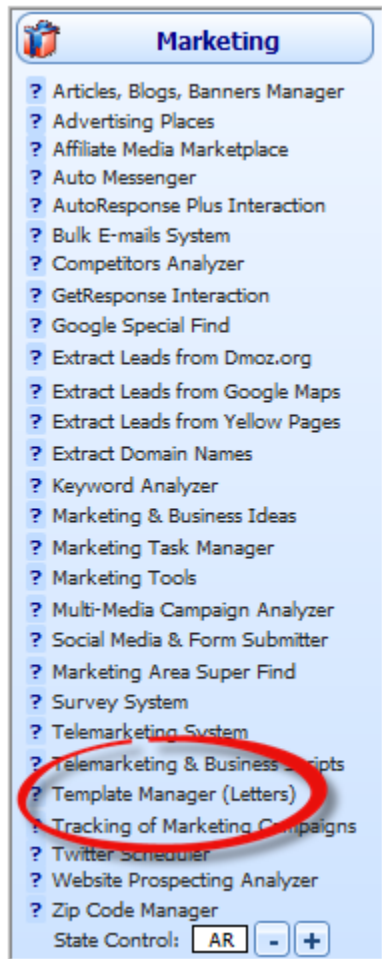
## TEMPLATES FOR DISPUTES

## SELECTING TEMPLATES

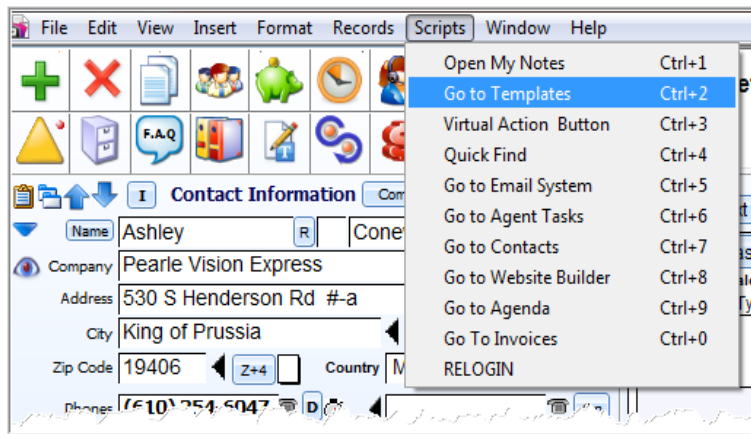
To select the templates to be used for the disputes in Credit Repair, go to the Template Manager.

The Template Manager can be accessed in three ways.

- 1) By clicking the Marketing tab (located at the right part of the main screen) and selecting Template Manager.



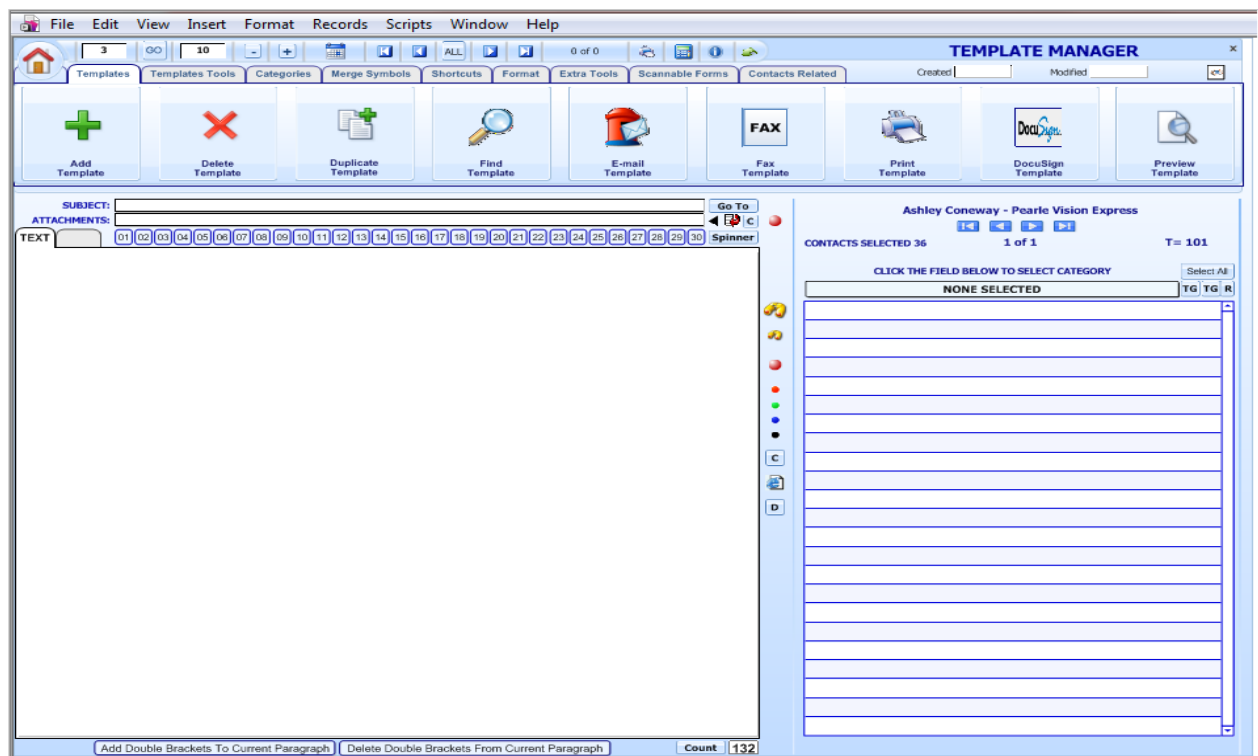
- 2) By clicking the Scripts tab menu and selecting Go to Templates or by pressing CTRL+2.



- 3) By clicking the Template Manager icon (located on top of the contact information section in level 5).

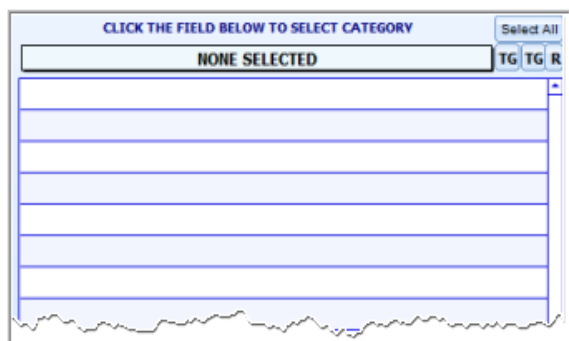


Now you should be in the Template Manager screen.

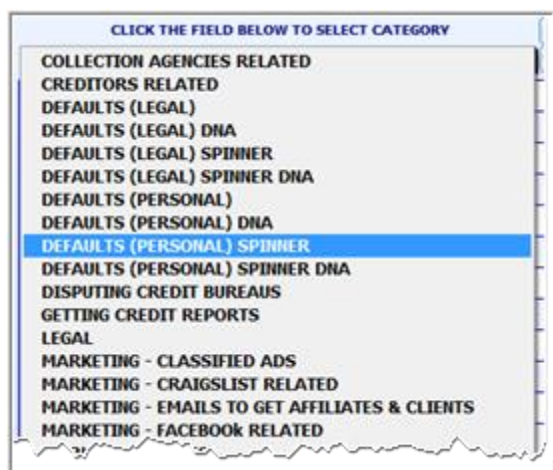


In the Template Manager, select the category of templates to use for your disputes in the Credit Repair area of the software.

To do this, click on the template Category field and select from the available categories.



In this case, select **DEFAULTS (PERSONAL) SPINNER DNA** for default templates with a Spinner action which practically spins or randomly select templates for the dispute entries.



Below are the default templates under the category DEFAULTS (PERSONAL) SPINNER DNA. Mark **the second checkbox** of the template under the selected category to be used in your dispute entries. Or you can just click on the second TG button to mark all the templates under the selected category.

CLICK THE FIELD BELOW TO SELECT CATEGORY		Select All
DEFAULTS (PERSONAL) SPINNER DNA		TG TG R
[[*]]15 DAYS CONSTRUCTIVE NOTICE TO	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[[*]]DISPUTE ITEM WITH ORIGINAL CREDITOR	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[[*]]Generic Initial Dispute Multiple [[M]] [[2(A)]]	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[[*]]GENERIC REMOVAL TO A NO RESPONSE FROM	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[[*]]LATE PAYMENT TO BE REMOVED [[ONE OR	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[[*]]OUTDATED INFORMATION TO BE REMOVED	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[[*]]REQUEST CORRECTION OF INACCURATE	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[[*]]Unauthorized Inquiry in Credit Report [[ONE OR	<input type="checkbox"/>	<input checked="" type="checkbox"/>
[[*]] Verification of Procedure after Verified Item	<input type="checkbox"/>	<input checked="" type="checkbox"/>

**Note** You can notice that below the selected category are templates with two checkmarks. The second checkmark column represents templates to be selected in the Disputes area or in the **Disputes Center**.

The selected templates will then be randomly picked based on their contents and the dispute type of the dispute entry and entered in the template field of each dispute in the Dispute Center.

S	A	Template	
<input type="checkbox"/>	<input checked="" type="checkbox"/>	[[*]]Generic	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	[[*]]Generic	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	[[*]]Generic	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	[[*]]Generic	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	[[*]]Generic	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	[[*]]Generic	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	[[*]]LATE	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	[[*]]LATE	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	[[*]]LATE	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	[[*]]LATE	<input checked="" type="checkbox"/>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	[[*]]Generic	<input checked="" type="checkbox"/>

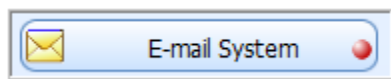
# INTEGRATED EMAIL SYSTEM – ACCOUNT SETUP

Our software features an integrated email system as supposed to interaction with the Microsoft Office Outlook or any other software.

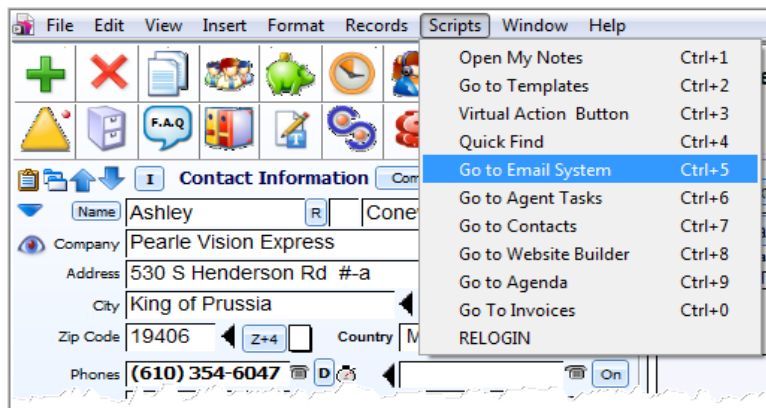
## HOW TO ACCESS THE EMAIL SYSTEM

There are three ways to access the email system.

- 1) By clicking the Email System button (located at the right side of the main screen).



- 2) By pressing CTRL+5 based on the Quick Access script under the Scripts tab.



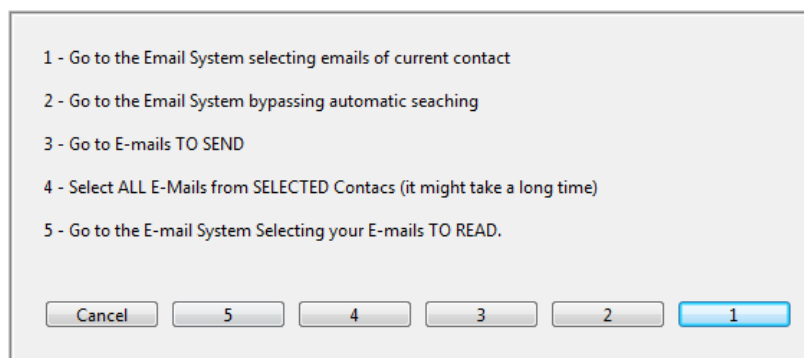
This option goes directly to the Email System. However if you use this option, you will not be selecting the emails of the current selected client. With this option, you can go back and forth to the main screen with CTRL+7 and you can go back by CTRL+5 without searching for the emails of the current client.

- 3) By clicking (if you are in level 5) the email icon located at the upper left part of the main screen.



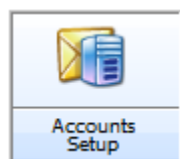
Then select from the options:





## ACCOUNTS SETUP AREA

To add your email account, click the Accounts Setup button.



**Note** that if you have a **Gmail account** that you want to setup in the software, you just have to click the Add Gmail account button inside the Account Setup area. Then provide the required fields from the pop-up windows dialog and follow the stated instructions.



On the other hand, to normally add your email account that is not Gmail, click Add Email Account button.



Then provide the required fields in the Accounts Setup screen.

**EMAIL ACCOUNTS SETUP**

This is NOT YOUR DEFAULT account when composing new messages. Click the SET AS DEFAULT TO SEND button to set it as default for you or another Agent.

**Required Fields**

Private Description: John Team USA [SET AS DEFAULT TO SEND] [?]

Will Be Received By: John Smith [CHECK DEFAULT TO SEND]

Full Name to be seen: John Smith [?]

Email Address: johnsmithcrm@gmail.com [?]

POP Server: [WHOIS] POP Server Port: 110 [POP3 LIST] [?]

POP Auth: LOGIN Timeout (secs): 60 POP SSL: ON OFF [?]

POP User Name: [?]

POP Password: [?]

SMTP Server: [WHOIS] SMTP Server Port: 25 [SMTP LIST] [?]

SMTP Auth: LOGIN Timeout (secs): 60 SMTP SSL: ON OFF [?]

SMTP User Name: [?]

SMTP Password: [?]

Use This Email for Bulk Sending: [ ]

Default Signature: [?]

Default Attachments: [?]

Default Subject: [?]

Default Group: [ADD GROUP]

DELETED MESSAGES FROM SERVER AFTER DOWNLOAD Delete After (Days): 7 [?]

THIS SERVER REQUIRES SMTP AUTHENTICATION TO SEND MAIL [?]

INCLUDE THIS ACCOUNT WHEN RECEIVING MESSAGES [?]

LEAVE EMAILS ON SERVER [?]

DOWNLOAD MESSAGE SIZE MAX: 999 [?]

PRIORITY DEFAULT: Normal [?]

**TEST RECEIVE** [?]

**TEST SEND** [?]

**SIGNATURES**

**OTHER OPTIONS**

**RESET HISTORY**

**RECEIVE EMAILS**

Processing: [ ] [?]

1 of 1 (Total=1)

Created: 02/12/12

Modified: 02/12/12

**Notes**

John Smith

ADMINISTRATOR

The following are the main fields\_for your email account that are needed to be filled in:

### PRIVATE DESCRIPTION

This field is where you specify a unique account description. Put a name in the private description that can only be seen by you. The description can be a personal email or maybe from a certain support department.

### FULL NAME TO BE SEEN

This field is where the name the client will see when receiving an email from you.

### EMAIL ADDRESS

This field is where the actual email address is entered.

### POP SERVER

This field is where the actual POP server is entered. Usually a *mail.domain\_name* is entered, but it could be something else.

### PREFERRED POP AUTHENTICATION

By default, LOGIN is entered in this field.

### POP USERNAME

Usually, your email is entered in this field. In that case, be sure that it is in lower case.

### **POP PASSWORD**

This field is where the password that you have with this email is entered.

### **SMTP SERVER**

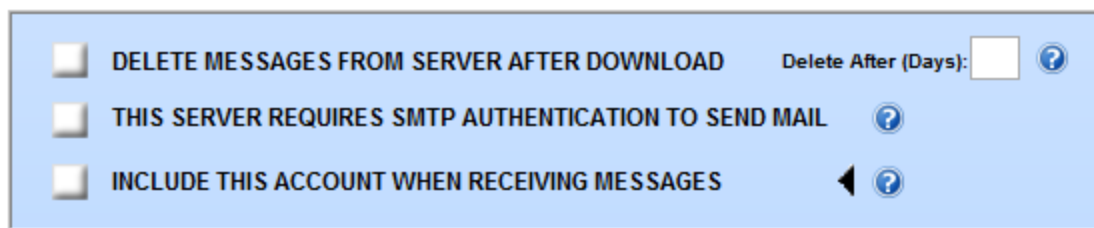
Usually, what is entered in this field is the same as what is entered in the pop server such as *smtp.domain\_name*.

### **SMTP USERNAME AND PASSWORD**

Sometimes, you don't need to do the SMTP server username or SMTP server password. You could leave it blank.

### **PREFERRED SMTP AUTHENTICATION**

There are cases that your account requires SMTP authentication. In that case, at the bottom left of the Email System Area, check mark the label that reads 'THIS SERVER REQUIRES SMTP AUTHENTICATION TO SEND MAIL' (located at the bottom part of the Accounts Setup screen)



The screenshot shows a light blue rectangular box containing three settings. Each setting has a checkbox on the left and a text label. The first setting is 'DELETE MESSAGES FROM SERVER AFTER DOWNLOAD' with an unchecked checkbox and a 'Delete After (Days):' field with a question mark icon. The second setting is 'THIS SERVER REQUIRES SMTP AUTHENTICATION TO SEND MAIL' with a checked checkbox and a question mark icon. The third setting is 'INCLUDE THIS ACCOUNT WHEN RECEIVING MESSAGES' with an unchecked checkbox and a question mark icon.

If you click on it, the username and password from the POP server will be copied automatically into the SMTP server.

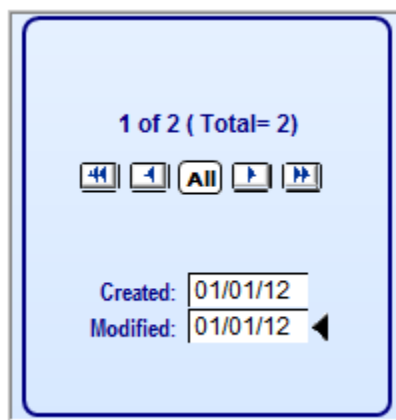
**Note** that this is the correct way to do it. While many other configuration are possible in terms of different ports for SMTP or even for pop server supports, this is the most common configuration and it should work 99% of the cases.

## **DISPLAY EMAILS TO READ**

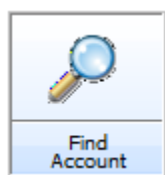
To display the emails of a particular email account in the software, go to the Accounts Setup by clicking the Accounts Setup button inside the Email System.



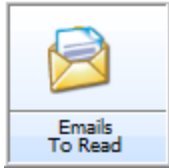
Going into the Accounts Setup allows you to select what account to use. To select, click on the 'All' button in the navigation bar and use the navigation arrows to find the account.



Or you can use the Find Account button (located at the upper right corner of the Accounts Setup screen).

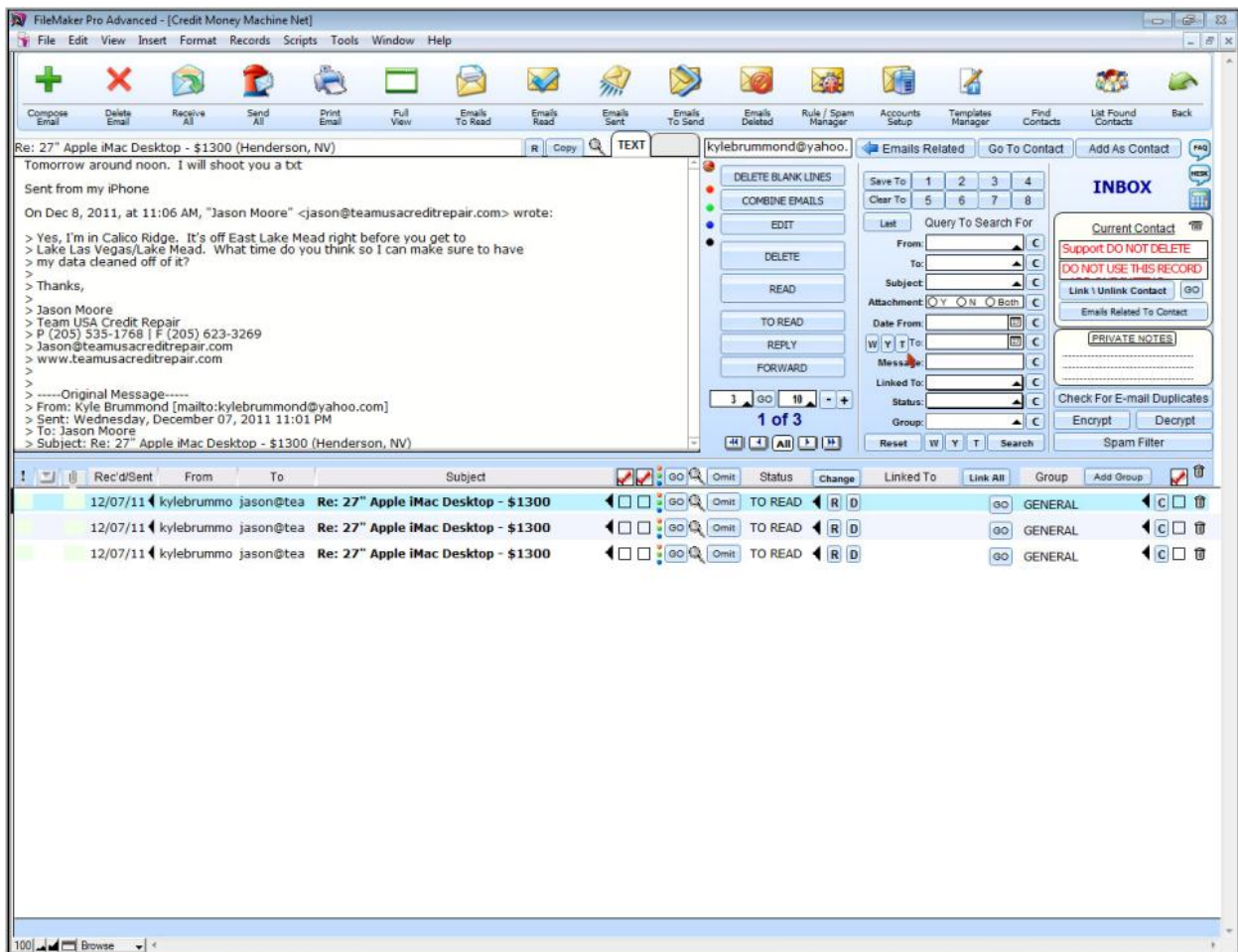


Once the account to use is selected, click the Emails To Read button.

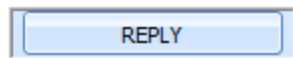


**Note** that if you hover on the button, there are a number of instructions of how to access the emails of the selected account that you can select from.

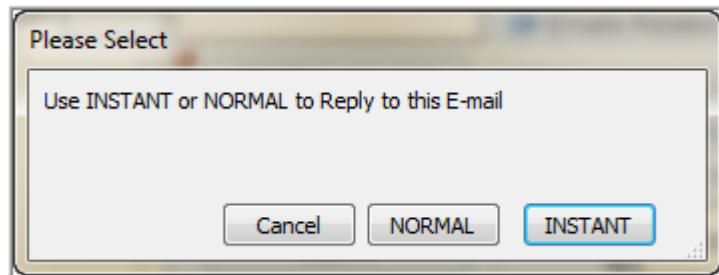
Now you should be in the Inbox screen of the selected account with the emails to read.



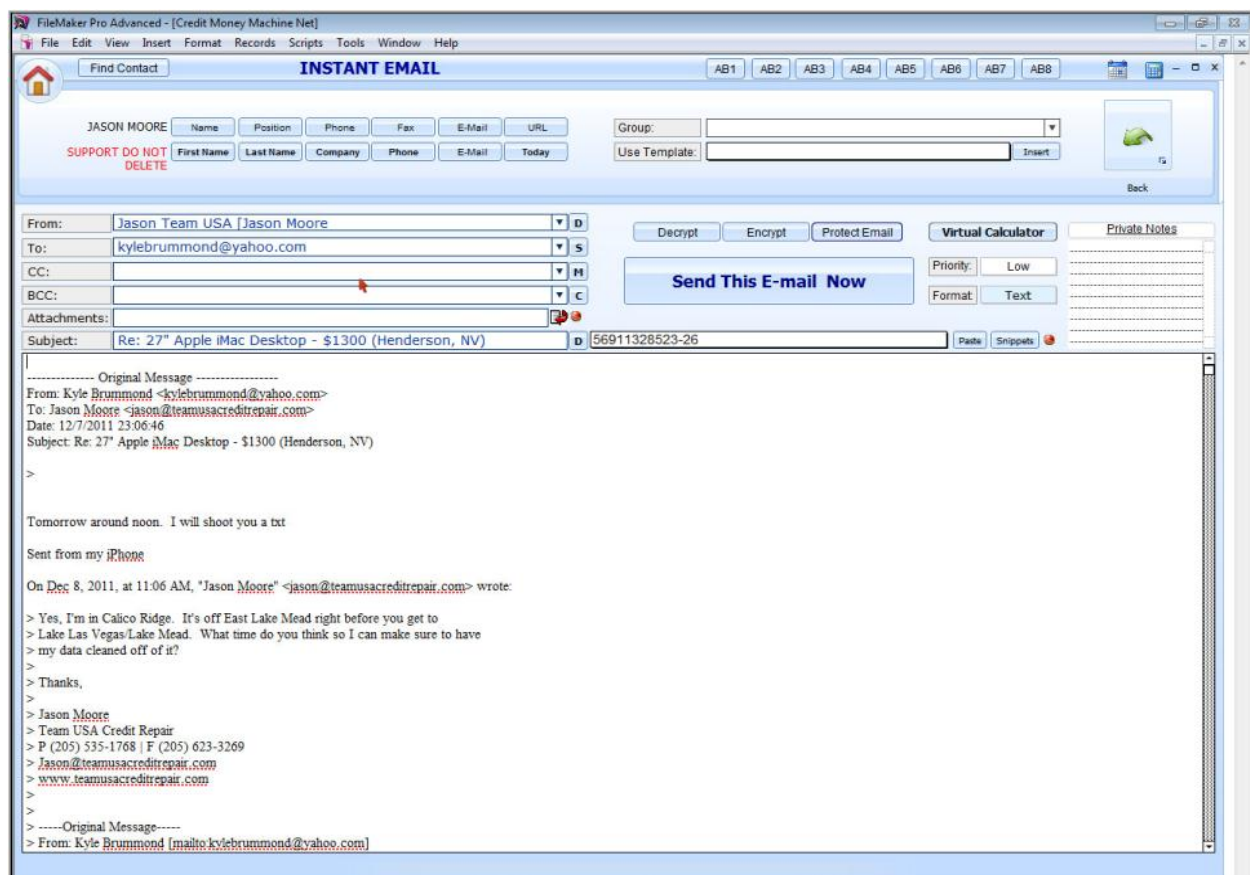
To reply from any of the emails in your inbox using the software, select the email and click the **Reply** button.



When having to reply to an email, you are to select what type of email to use.



In the case where you select **INSTANT** which is faster than the NORMAL option, the following screen is displayed.

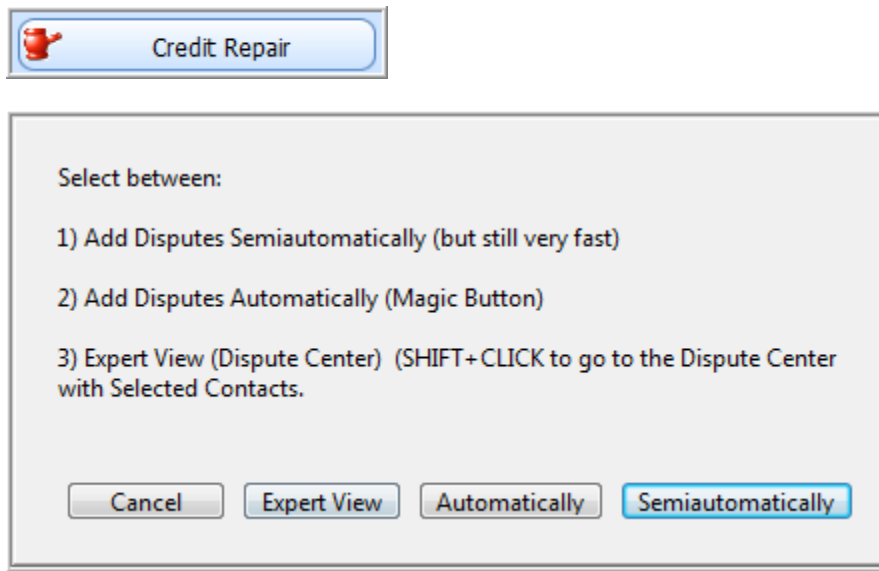


# CREDIT REPAIR

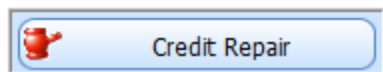
## THE DISPUTE CENTER

Once the basic data is entered you can proceed to the Dispute Center. You can do this in two ways.

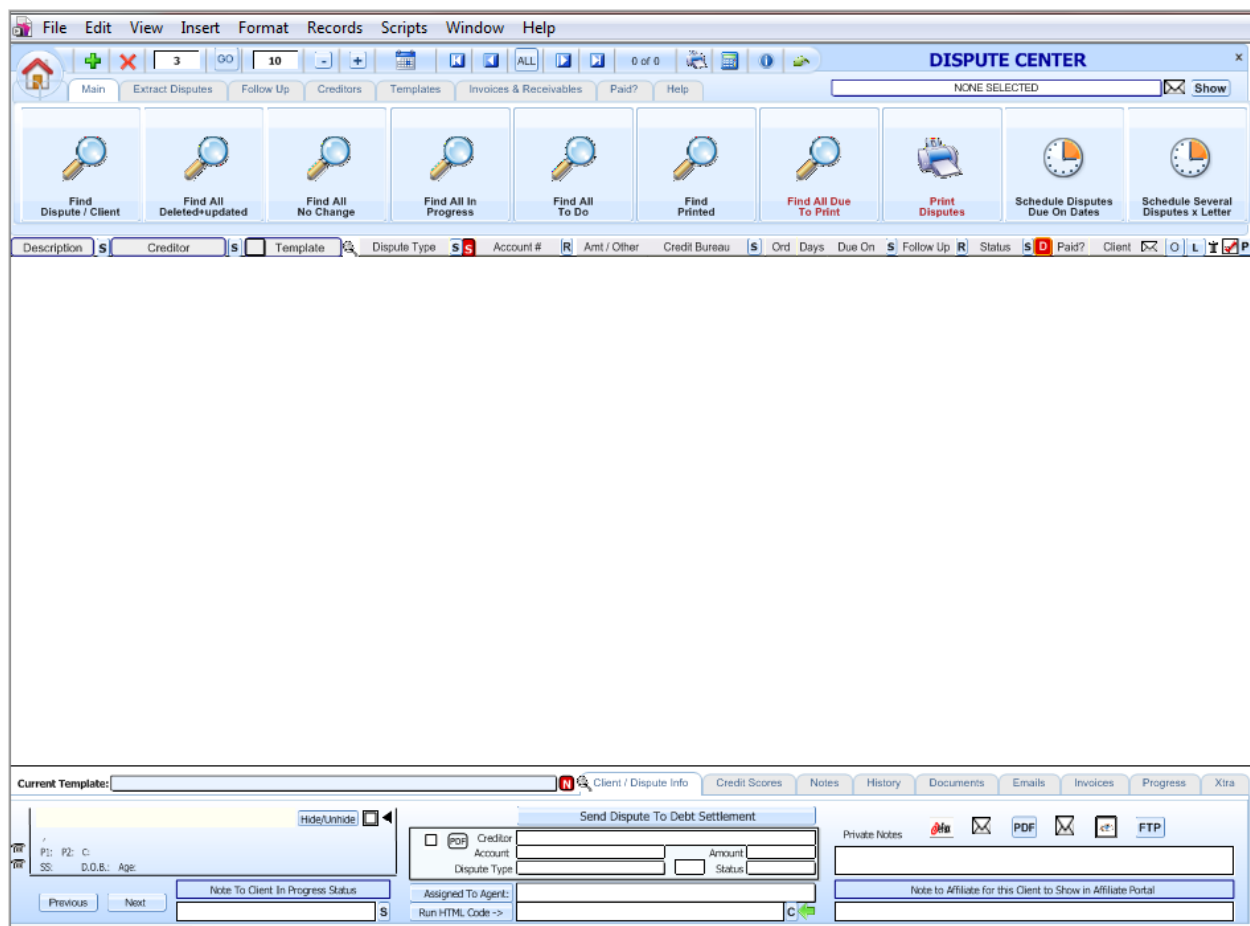
- 1) By clicking the Credit Repair button (located at the bottom right of the screen in level 1, 3, 4 and 5) and then the EXPERT VIEW button (in level 2 the button is at the top left.)



- 2) By pressing and holding the SHIFT+CONTROL key combination and then clicking on the Credit Repair button.



Now you should be in the Dispute Center screen.



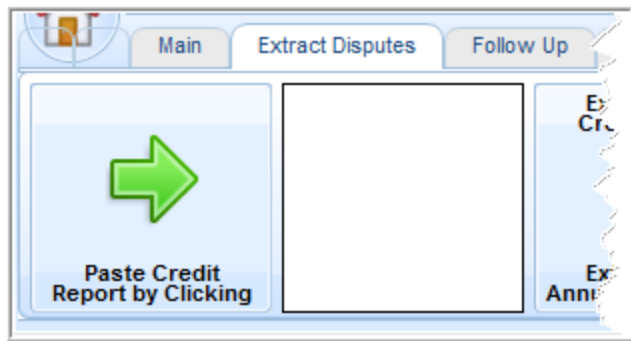
Now is time to download the Credit Report for your client. While it is possible to extract from credit reports of different credit report providers we recommend you to advise your client to use [www.creditkeeper.com](http://www.creditkeeper.com) because it is easy to use and cheaper and it works flawlessly.

So from now on, these instructions will assume that you are using a Credit Keeper report from your client.

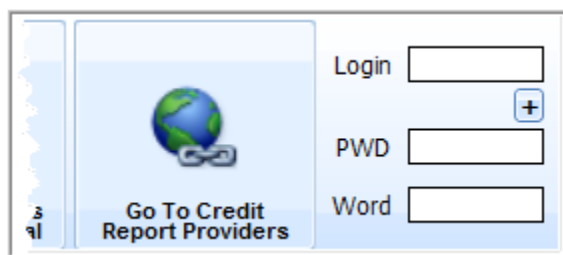
To retrieve your client's credit report you need his username, password and the security word.

Once you have that click on the EXTRACT DISPUTES tab at the top of the screen.



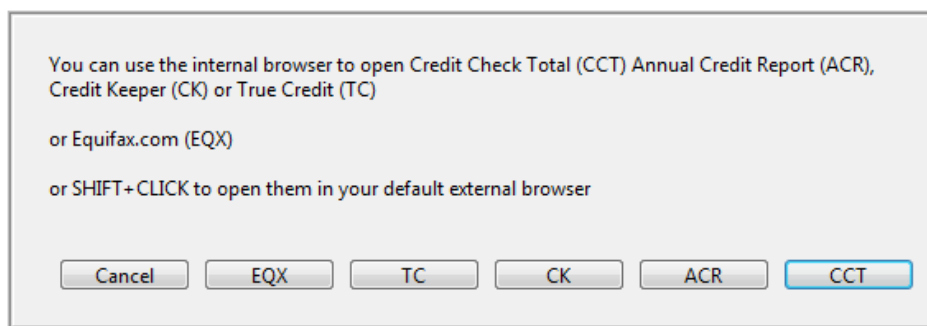


You can enter your client's Username, Password and Security Word in the right side of the screen



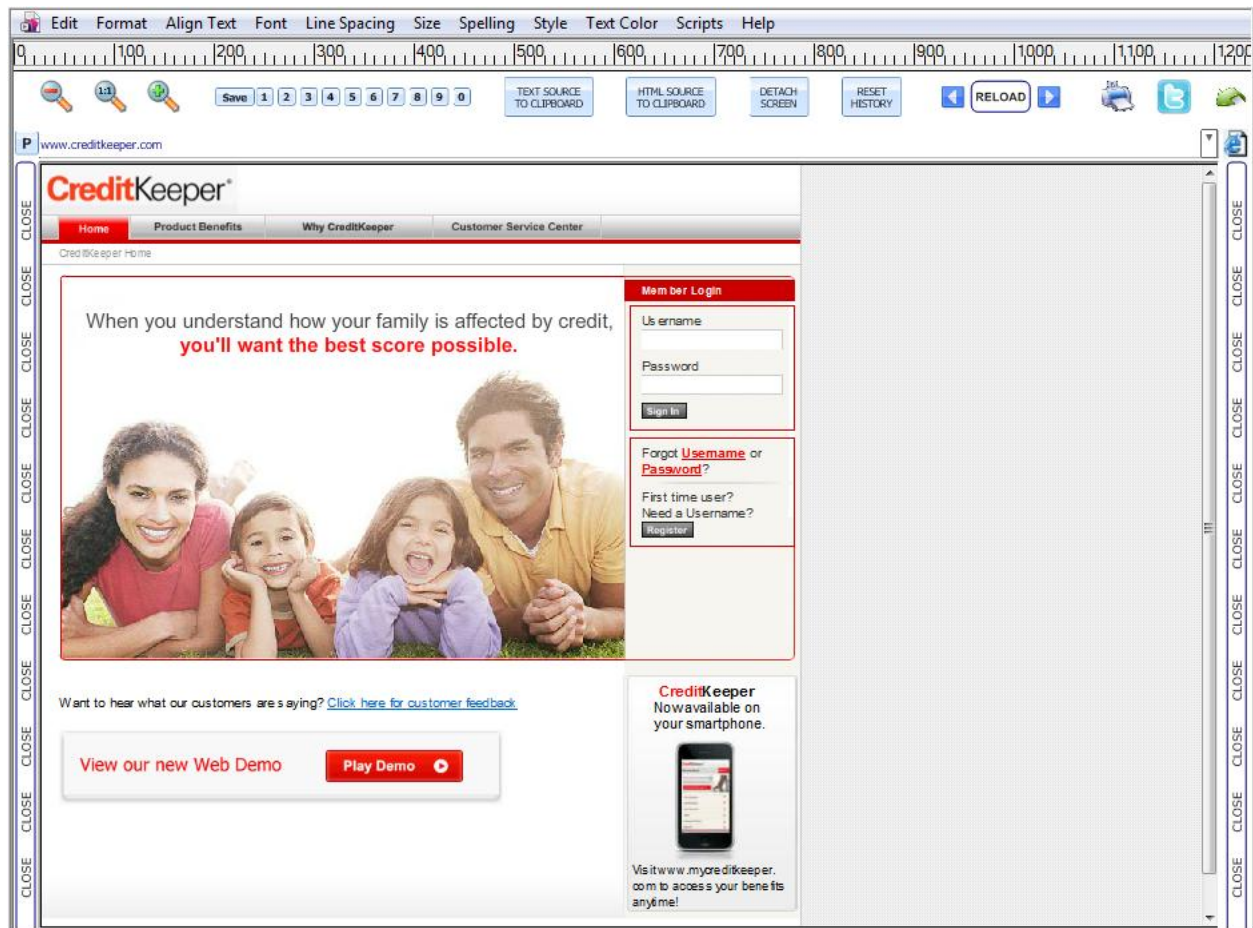
Notice that an empty line (row) is created automatically and once all disputes are extracted ***most will be deleted.***

Once there you will click the "Go To Credit Report Providers" button and select the CK (Credit Keeper) button.



Once you click the CK button the [www.CreditKeeper.com](http://www.CreditKeeper.com) website will open inside the software.

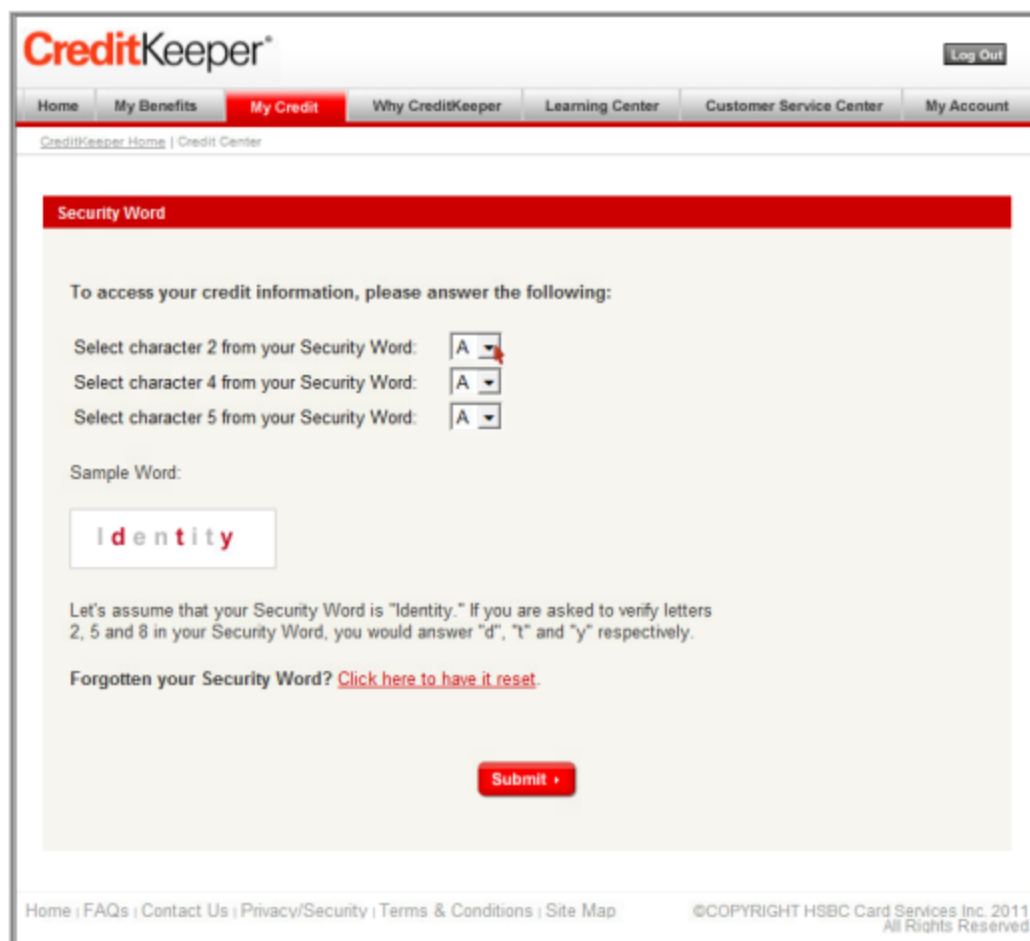
The Username and Password of the client will be copied to your Windows Clipboard so it is perfectly possible to paste that using the CTRL+V key combination.



Once you enter into your Credit Keeper account, you can then access your credit information by clicking on the My Credit tab.



The first screen that you will see is to enter 3 letters related to the secret word. Please read the instructions and sample on how to do that.



**CreditKeeper®** Log Out

[Home](#) [My Benefits](#) **[My Credit](#)** [Why CreditKeeper](#) [Learning Center](#) [Customer Service Center](#) [My Account](#)

[CreditKeeper Home](#) | [Credit Center](#)

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**Security Word**

To access your credit information, please answer the following:

Select character 2 from your Security Word:

Select character 4 from your Security Word:

Select character 5 from your Security Word:

Sample Word:

**I d e n t i t y**

Let's assume that your Security Word is "Identity." If you are asked to verify letters 2, 5 and 8 in your Security Word, you would answer "d", "t" and "y" respectively.

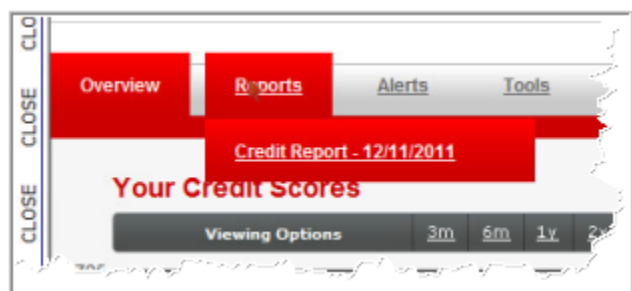
Forgotten your Security Word? [Click here to have it reset.](#)

**Submit**

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Once there HOVER you mouse (don't click on it) on the Reports button and select Credit Report.



Now you should be in the Credit Report screen.

**CreditKeeper®** [Close Window](#)

[Print this page](#)   [View Full Report](#)

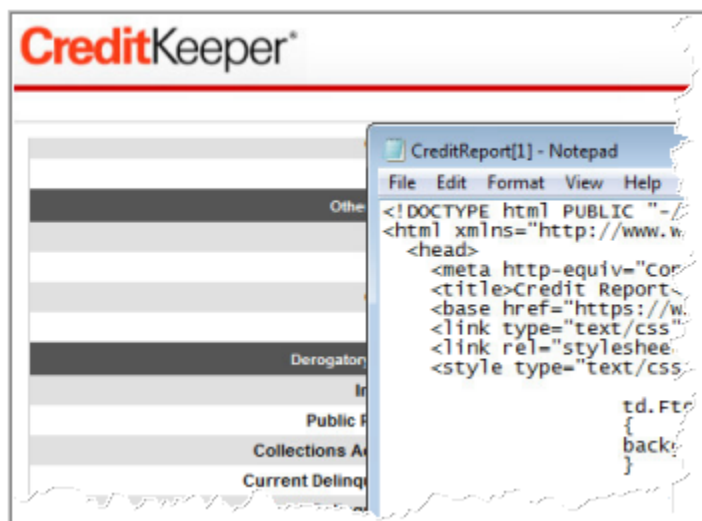
Prepared for: kathryn duke | Report Date: 12/11/2011 (GMT)

Personal Profile	Credit Summary	Account History	Credit Inquiries	Public Records	Credit Score
<p>Below is your personal information as it appears in your credit file. This information includes your legal name, current and previous addresses, employment information and other details.</p>					
	Experian	Equifax	TransUnion		
Name:	KATHRYN DUKE	KATHRYN DUKE	KATHRYN DUKE		
Also Known As:	KATHERINE DUKE CATHERINE DUKE		DUKE, KATHRYN		
Year of Birth:	1988	1988	1988		
Address(es):	3175A OLD COLUMBIANA RD BIRMINGHAM, AL 35226-3706  1028 TERRANIUM DR HENDERSON, NV 89011  1926 3RD AVE N STE 302 BIRMINGHAM, AL 35203-3533	3175A OLD COLUMBIANA RD BIRMINGHAM, AL 35226  3034 CHESTNUT RIDGE LN HOOVER, AL 35216  1926 3RD AVE N APT 302 BIRMINGHAM, AL 35203	3175 OLD COLUMBIANA RD VESTAVIA, AL 35226  3034 CHESTNUT RIDGE LN HOOVER, AL 35216		
Current Employer:			FINANCIAL SOLUTIONS		
Previous Employer(s):			FINANCIAL SOLUTIONS		

[Return to top](#)   [Print this page](#)   [View Full Report](#)

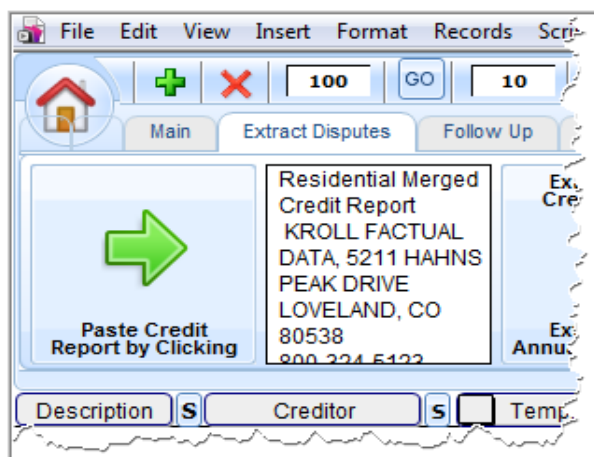
In the Credit Report screen, click the 'View Full Report' link. Once there, right click on the page and select View Page Source.

The page source will then pop up from which you will copy all the text into the Windows Clipboard.

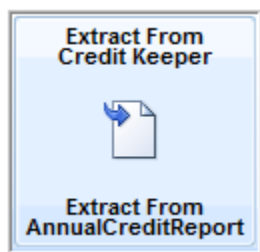


## EXTRACTING THE DISPUTES

Once you have the credit report in the Windows Clipboard come back to the software and click the GREEN ARROW to paste it in the correct field.

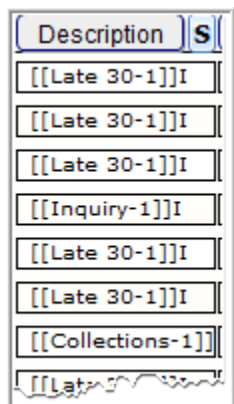


Then click the "Extract From Credit Keeper" button to extract all the items to dispute.



When you click the extract button only the derogatory are extracted:

The Description / Reason for the dispute



The Creditor which also will be added automatically to the creditor's database (The software comes with more than 5000 creditors)

Creditor	S
BK OF AMER	<input type="checkbox"/>
NATIONWIDE	<input type="checkbox"/>
VERIZON	<input type="checkbox"/>
FDC	<input type="checkbox"/>
5/3 CC	<input type="checkbox"/>
Asset	<input type="checkbox"/>

The Letters (templates) will be assigned automatically based on the Dispute Type.

Template	N
[[*]]Unauthoriz	<input type="checkbox"/>
[[*]]Unauthoriz	<input type="checkbox"/>
[[*]]Unauthoriz	<input type="checkbox"/>
[[*]]Unauthoriz	<input type="checkbox"/>
[[*]]Unauthoriz	<input type="checkbox"/>
[[*]]Unauthoriz	<input type="checkbox"/>
[[*]]LATE	<input type="checkbox"/>
[[*]]Unauthoriz	<input type="checkbox"/>
[[*]]LATE	<input type="checkbox"/>

The Dispute Types will be assigned automatically for each Dispute Item.

Dispute Type	S
Late Payment	<input type="checkbox"/>
Late Payment	<input type="checkbox"/>
Late Payment	<input type="checkbox"/>
Inquiry - 6	<input type="checkbox"/>
Late Payment	<input type="checkbox"/>
Late Payment	<input type="checkbox"/>
Collection - 4	<input type="checkbox"/>

Also, the accounts are extracted automatically.

Account#	R
4800113999	
4755397	
437	
5444000199	
22648438	
158806	4

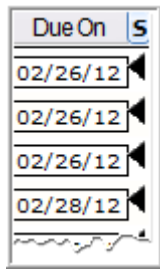
The amounts are extracted as appropriate as well as the dates for inquiries.

Amt/Other
8,931
901
245
01/29/20
524
449

The Credit Bureaus are assigned automatically as appropriate.

Credit Bureau	S
<input checked="" type="radio"/> EQ <input type="radio"/> EX <input type="radio"/> TR	
<input type="radio"/> EQ <input checked="" type="radio"/> EX <input type="radio"/> TR	
<input type="radio"/> EQ <input type="radio"/> EX <input checked="" type="radio"/> TR	
<input type="radio"/> EQ <input type="radio"/> EX <input checked="" type="radio"/> TR	
<input checked="" type="radio"/> EQ <input type="radio"/> EX <input type="radio"/> TR	

Even the dates when you should send the letters are assigned automatically.



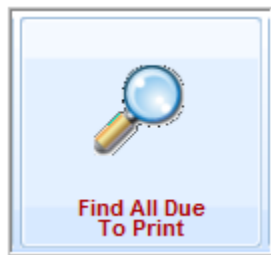
So in seconds we have set all the disputes for these clients.

## **SELECTING ALL DISPUTES TO PRINT FOR ALL CLIENTS**

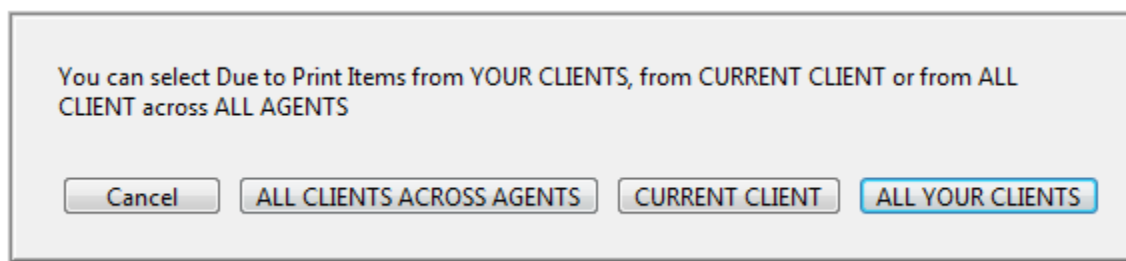
Usually we don't want to process client by client since it would take the whole day even with a small number of clients.

For this reason we can process them at the same time.

Just click the "Find All Due To Print" button

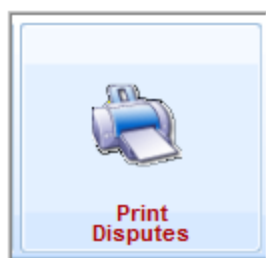


And then click on the "All Your Clients" button to select with one click all disputes due to be printed among all clients.



Then, click the "Print Disputes" button along with the "Selected" button to print all dispute items selected. This way you can do the work of a whole day in minutes.





That's if you have process and printed the disputes for all your clients at once.

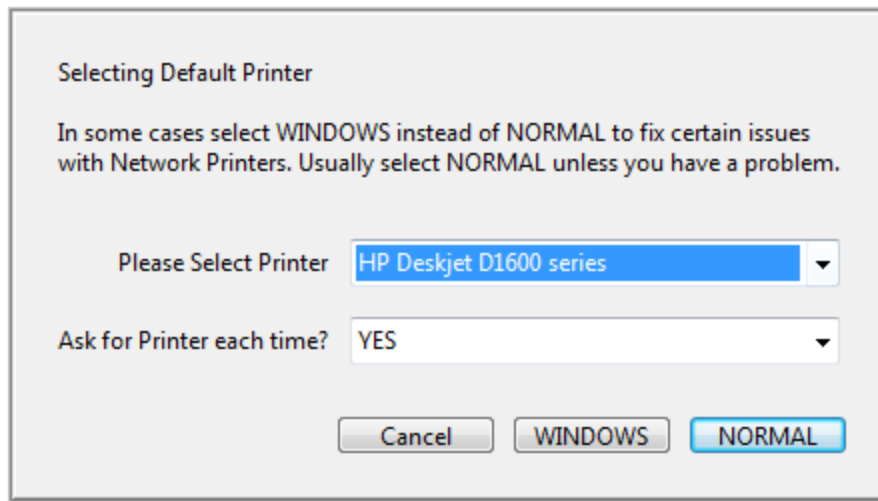
## **TROUBLESHOOTING PRINTERS**

Some network printers can present some issues to print under certain conditions. If your printer does not print then do the following:

Click the printer icon at the top of the Dispute Center screen



Then, select your printer and click the WINDOWS button.

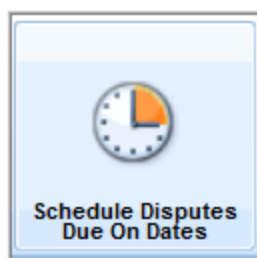


This will resolve all printing issues. You will need to repeat this every time that you upgrade to a new version.

## **CHANGING THE DUE DATES AUTOMATICALLY**

The default number of days between batches is 2 days. While this might be appropriate in many cases (especially when you want to repair your clients' credit as soon as possible) it is possible to change the due on date easily.

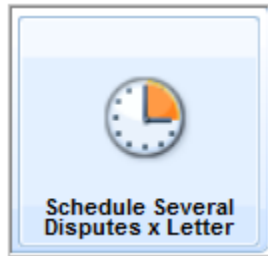
To change the number of days in between batches of letters just click the "Schedule Disputes Due on Dates" button and set a different number of days.



## **SETTING SEVERAL DISPUTES PER LETTER**

While it is recommended to send just one dispute per letter it's very easy to set several disputes per letters.

Just click the "Schedule Several Disputes x Letter" button and set how many disputes will be set per letter and the number of days in between batches.



When you are grouping several disputes in one letter you will see the groups in the right side of the screen as letters from A to Z.



Three things need to happen to be grouped

- 1) The Credit Bureaus must be the same
- 2) The Template assigned must be the same
- 3) The status must be TO DO

In this case, when you select the disputes due to print, as explained elsewhere before, the ones belonging to the group will be selected too.

## **PAY PER DELETION CREDIT REPAIR EXPLAINED**

“Pay Per Deletion” is when you charge to your clients a fee after you delete or update as appropriate the disputed items.

This is a 100% legal method to credit repair and should be used if at all possible.

If you still want to charge your clients with a setup fee, this fee should be unrelated to credit repair.

That is why we include in our software four tools to specifically address this issue.

These tools, explained elsewhere, are:

- 1) The Credit Card Analyser
- 2) The Debt Reduction System
- 3) The Loan Amortization Center
- 4) The Budget Center.

These tools can be used as consulting tools to charge an initial setup fee unrelated to your credit repair efforts which ideally should be “Pay Per Deletion”

When you do a “Pay Per Deletion” you need to ask your client to maintain a monitor service with the credit report provider (like Credit Keeper) so you can check deletions and updates every month.

The procedure is as follows:

In the Dispute Center, select the client you want to update then the same system explained elsewhere above to extract the disputes only that this time, automatically you will be presented with a different window when you click the “Extract from Credit Keeper” button.

When you see the above window, just click on the “EXTRACT AND DISPLAY COMPARISON VIEW” button.

This will produce a view similar to the one below.

Notice that the Status column has changed from TO DO to other status such as NO CHANGE, COMPARE, DELETED, etc.

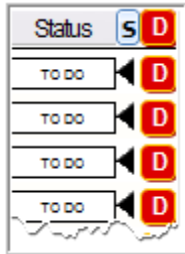
You can change the status by just clicking on it and selecting among the list of available predefined statuses.

## CREATING AN INVOICE FOR DELETED AND UPDATED DISPUTES

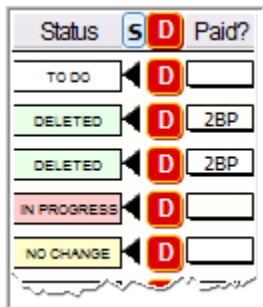
In the Dispute Center, you can directly create an invoice with deleted and updated dispute entries.

**Note** To create an invoice inside the Dispute Center, the status of the dispute entries must not be TO DO, IN PROGRESS, NO CHANGE, ON HOLD, and NO ANSWER.

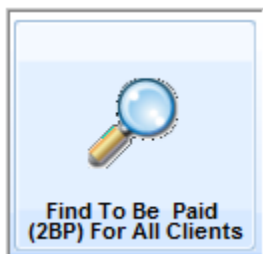
To change the status of the disputes into DELETED or UPDATED, click on the status field.



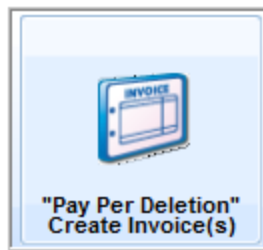
While the Paid column fields of the dispute entries are blank by default, once the status of a dispute is changed into either DELETED or UPDATED, they will be changed into 2BP.



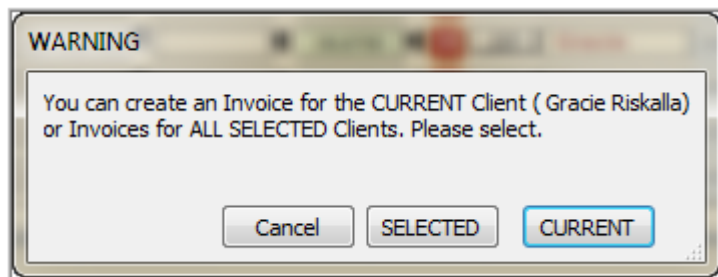
For example, to create an invoice for disputes with the DELETED or UPDATED status, the easiest thing to do with thousands of dispute entries is to click under the Paid tab and select Find 2BP for All Clients.



Next thing to do once you have selected disputes entries is to click Create Invoices under the Invoices & Receivables tab.



And select to whom the client the invoice is for.



Then enter a fix amount and an additional text in which by default is provided as shown in the windows dialog below and click either to create an invoice by DISPUTE or by ACCOUNT.

In this case, we click BY DISPUTE INVOICE.

This option will send SELECT DISPUTES to the INVOICES either by ACCOUNT (consolidating the three bureaus in one line) or by DISPUTE (each bureau per line).

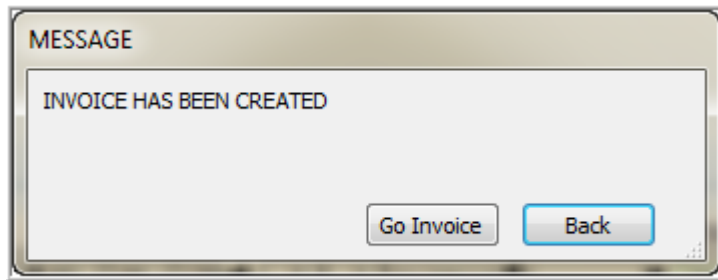
This is ideal for Companies that charge their clients by ACCOUNT (like a fix cost if item is deleted) or by DISPUTE (like a fix price for Item by Credit Bureau)

You can also enter a fix amount that will be used for each line and additional text to be added per line for any purpose (usually saying \"per item\" or similar text

Enter Amount (only numbers)

Enter Additional Text (10 chars max)

Once the invoice is created, click Go Invoice to go directly in the Invoice System.



Below is the Invoice System with the new invoice of the selected dispute entries created in the Dispute Center.

File Edit View Insert Format Records Scripts Window Help

2 of 2

Add Duplicate Delete Find Email Efax Print DocuSign 1 GO 10 List View Banks Reports Envelope Excel Exp Products Receivables Contacts

By Agent: John Smith

Invoice Details Created: 02/12/12 Modified: 02/12/12

Change Seller: Find Client: Gracie Riskalla - Jessup, Richard A Esq Use This Client

SELLER: Attn: Company: Address: City / St / Zip Code: Phone: Fax: Tax:

BILL TO: Attn: Gracie Riskalla Company: Jessup, Richard A Esq Address: 5345 Madison Ave City / St / Zip Code: Sacramento CA 95841 Country: Sacram Ph: (916) 344-7735

SHIP TO: Attn: Gracie Riskalla Company: Jessup, Richard A Esq Address: 5345 Madison Ave City / St / Zip Code: Sacramento CA 95841 Country: Sacram Ph: (916) 344-7735

Select Only This Invoice Select All Invoices / Quotations for this Client

Invoice # 102 PO Number Invoice Date 02/12/12 Due Date 02/12/12 Chg Due Chg Date Paid Date Status INVOICED QUOTATION INVOICED PAID VOID

This is a representation of the available space in the Invoice based on Font Courier New Size 18 here and Size 10 in the Invoice. Click the Magnifier icon above to see the whole Invoice

Copy Snippets

Invoice Description	Amount	Per Item	Collection	Palisades	Collection in	TRANSUNION	PAL1ATT502
02/12/2012	\$25.00	per item	Collection	Palisades	Collection in	TRANSUNION	PAL1ATT502
02/12/2012	\$25.00	per item	Collection	Palisades	Collection in	EXPERIAN	PAL1ATT502
02/12/2012	\$25.00	per item	Collection	Palisades	Collection in	TRANSUNION	PAL1ATT509
02/12/2012	\$25.00	per item	Collection	Palisades	Collection in	EXPERIAN	PAL1ATT509
02/12/2012	\$25.00	per item	Collection	Palisades	Collection in	TRANSUNION	PAL1ATT512
02/12/2012	\$25.00	per item	Collection	Palisades	Collection in	EXPERIAN	PAL1ATT512

BALANCE: \$ 150.00 AS OF: 2/12/2012

Notes: S

Keywords: Referred: Tracking #

Recurrence Information: RT Every + Times Next Date Due 1 Month 12 02/12/12

Process Recurrence: Sales Tax Sent To Government? O Y N Find / Set

Subtotal: \$150.00

Tax: \$0.00

Total: \$150.00

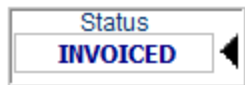
Delivered: Ship Cost Shipping Via Ship Date Delivery Assigned Printed By Paid Terms Print Date Marketing Campaign Ad Date

Private Notes (won't print) AVS S Date Pmt Type Bank Account Payment Description CK Balance \$150.00

Charge Credit Card Status Invalid

Notice that the status of the new invoice is set to 'INVOICED' automatically.

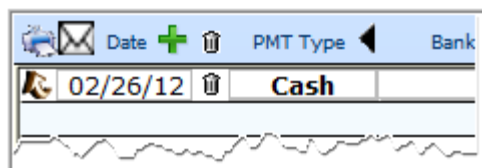




Once a payment is made to the invoice, you have to add a payment entry for the invoice by clicking on the green plus button (located at the bottom part of the Invoice System).



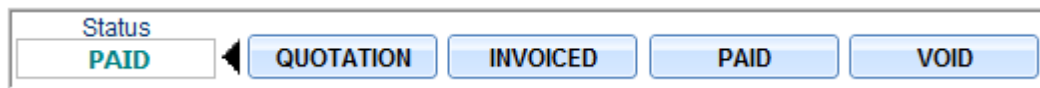
A new line of payment will then be created in the payment area. Now select the payment type by clicking on the payment type (PMT Type) field.



Also click on 'B' (located at the right most part of the payment entry) to copy the balance to the Amount Paid field.

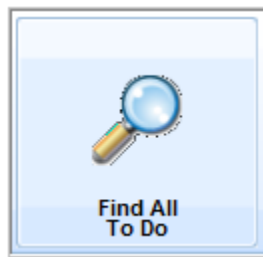


Then change the status of the invoice to PAID by clicking the PAID button.

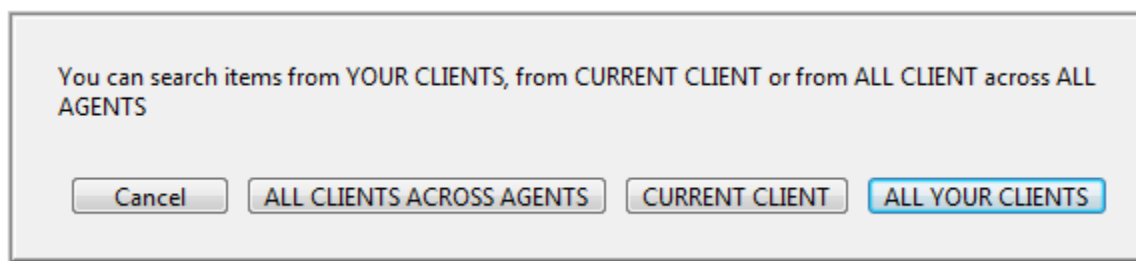


## CREATING AN INVOICE FOR 'TO DO' DISPUTES

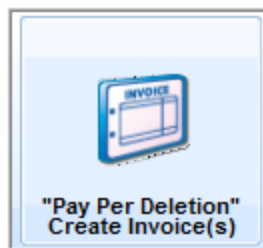
To create an invoice for disputes with TO DO status, first, select all of these disputes by clicking the FIND All To Do button under the main tab.



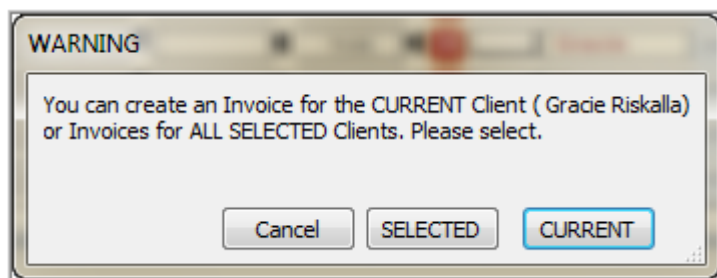
Then select from which client the 'TO DO' disputes will be extracted from.



Then click the Create Invoices under the Invoices & Receivables tab.



And select to whom the client the invoice is for.



Then enter a fix amount and an additional text in which by default is provided as shown in the windows dialog below and click either to create an invoice by DISPUTE or by ACCOUNT.

This option will send SELECT DISPUTES to the INVOICES either by ACCOUNT (consolidating the three bureaus in one line) or by DISPUTE (each bureau per line).

This is ideal for Companies that charge their clients by ACCOUNT (like a fix cost if item is deleted) or by DISPUTE (like a fix price for Item by Credit Bureau)

You can also enter a fix amount that will be used for each line and additional text to be added per line for any purpose (usually saying \"per item\" or similar text

Enter Amount for Fixed Price or By Account Invoice (only numbers)

Enter Additional Text (10 chars max)

Now since the invoice to be created is from the disputes with TO DO status, you can create a GOOD FAITH ESTIMATE by clicking on it.

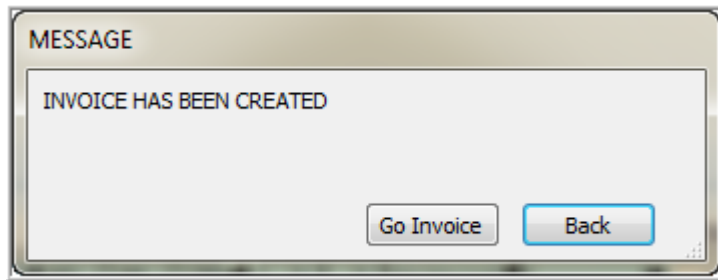
STATUS is TO DO or IN PROGRESS or NO CHANGE or ON HOLD or NO ANSWER this looks like an error. Do you want to continue? You can create a GOOD FAITH ESTIMATE (GFE) Please Select

And enter the estimated percentage of the invoice.

You have selected to create a GOOD FAITH ESTIMATE so please enter what is the estimate percentage that we believe will be your performane

Enter Percentage (only numbers)

Once the invoice is created, click Go Invoice to go directly in the Invoice System.



Below is the Invoice System with the new invoice of the selected dispute entries created in the Dispute Center.

File Edit View Insert Format Records Scripts Window Help

3 of 3

Add Duplicate Delete Find Email Efax Print DocuSign 1 GO 10 LIT View Banks Reports Envelope Excel Exp Products Receivables Contacts

By Agent: John Smith

Invoice Details Created: 02/12/12 Modified: 02/12/12

Change Seller: Find Client: Gracie Riskalla - Jessup, Richard A Esq Use This Client

SELLER: Attn: Company Address City / St / Zip Code Phone: Fax: Tax:

BILL TO: Attn: Gracie Riskalla Company: Jessup, Richard A Esq Address: 5345 Madison Ave City / St / Zip Code: Sacramento CA 95841 Country: Sacram Ph: (916) 344-7735

SHIP TO: Attn: Gracie Riskalla Company: Jessup, Richard A Esq Address: 5345 Madison Ave City / St / Zip Code: Sacramento CA 95841 Country: Sacram Ph: (916) 344-7735

Invoice # 103 PO Number Invoice Date 02/12/12 Due Date 02/12/12 Chg Chg Date Paid Date Status QUOTATION INVOICED PAID VOID

This is a representation of the available space in the Invoice based on Font Courier New Size 18 here and Size 10 in the Invoice. Click the Magnifier icon above to see the whole Invoice

Invoice Description	Amount	Per	Item	Late Payme	Maf Collection Servi	in	EXPERIAN	3351088014
02/12/2012	\$25.00	per	item	Late Payme	Maf Collection Servi	in	EQUIFAX	3351088014
02/12/2012	\$25.00	per	item	Late Payme	Gulf Coast Collectio	in	EXPERIAN	894437
02/12/2012	\$25.00	per	item	Late Payme	Gulf Coast Collectio	in	EQUIFAX	894437
02/12/2012	\$25.00	per	item	Late Payme	Gulf Coast Collectio	in	EXPERIAN	958717
02/12/2012	\$25.00	per	item	Late Payme	Gulf Coast Collectio	in	EQUIFAX	958717
02/12/2012	\$25.00	per	item	Late Payme	Palisades	in	EQUIFAX	AT
02/12/2012	\$25.00	per	item	Late Payme	Florida Power A	in	EQUIFAX	30194615
02/12/2012	\$25.00	per	item	Late Payme	Palisades	in	EQUIFAX	AT

Notes: S

Keywords: Referred: Tracking:

Recurrence Information: RT Every 1 Month 12 02/12/12

Process Recurrence: Next Date Due

Sales Tax Sent To Government? O Y N Find / Set

Calculate: Subtotal: \$339.00 SM: 0.00 Tax: \$0.00 Total: \$339.00

CLICK TO SAVE AFTER PAYMENT IS ENTERED

Delivered: Ship Cost: Shipping Via: Ship Date: Delivery Assigned: Printed By: Paid: Terms: Print Date: Marketing Campaigns: Ad Date: Tax: \$0.00

Private Notes (won't print):

Bank Account: Payment Description: Balance: \$0.00

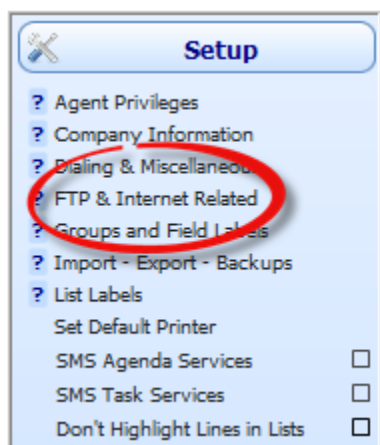
Charge Credit Card: Status: Invalid

**POST DISPUTES IN YOUR INTERNET SERVER**

To submit your disputes in your internet server, click the FTP button (located at bottom right of the Dispute Center screen). Follow the instructions provided by the tooltip of the FTP button displayed by hovering on the button.



In the instruction from the tooltip, you are asked to enter the FTP information and the name of the company. To do this, you need to access FTP & Internet Related under Setup (located at the right part of the main screen).



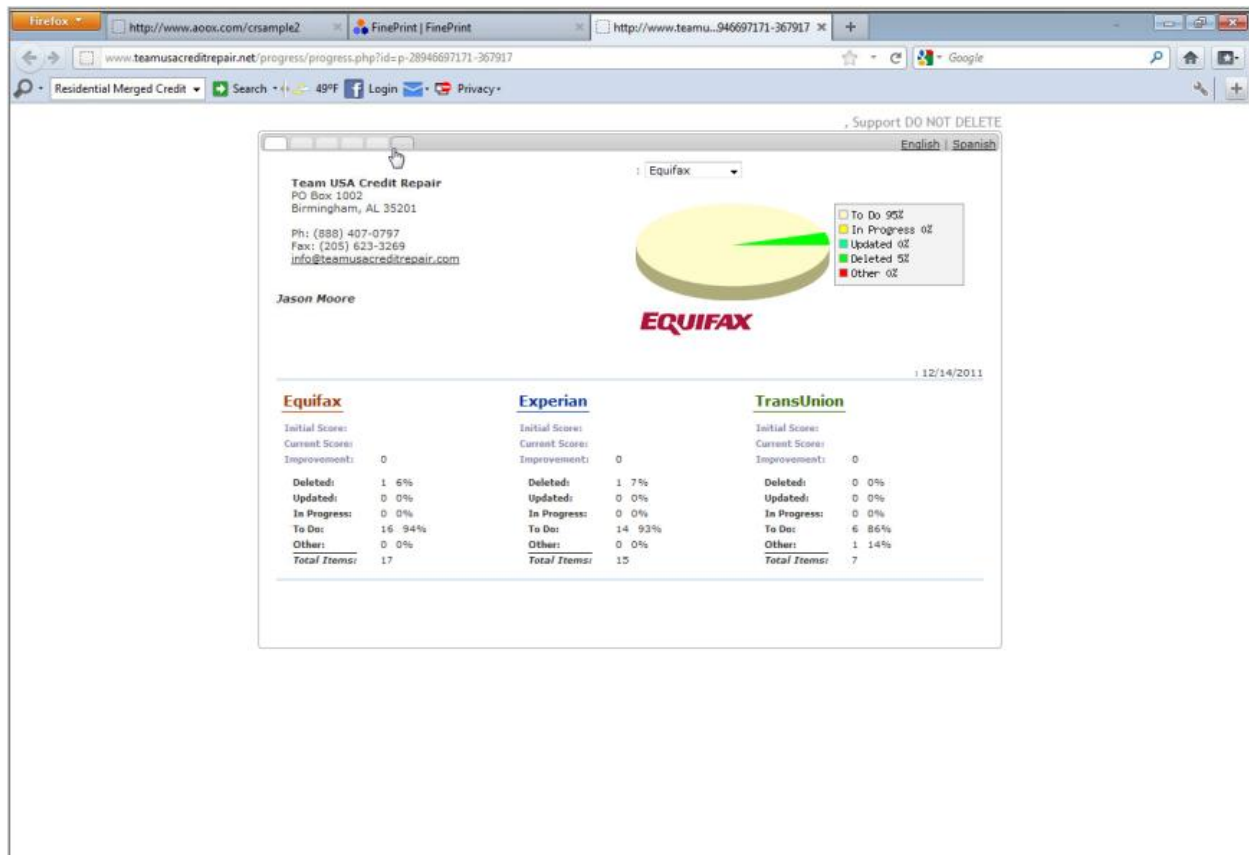
Inside the FTP & Internet Related area of the Setup, enter the FTP information in the FTP and Progress Status section.

A screenshot of a form titled "FTP coordinates to upload the PROGRESS STATUS Pages". The form has two tabs: "WHOIS" and "SPEED". Below the tabs are several input fields: "HOST IP:", "USER ID:", "PASSWORD:", "DOMAIN+DIR:", "INITIAL DIR:", and "TEMPLATE:". The "TEMPLATE:" field contains the text "progress.php". At the bottom of the form are two buttons: "FTP FILES" and "FTP TEST PAGE".

Now once the disputes are submitted in your internet server, you can see your webpage in your default browser by clicking on the display icon (located beside the FTP button).



Below is the web page from a default browser with the default company name and the disputes submitted in the internet server.



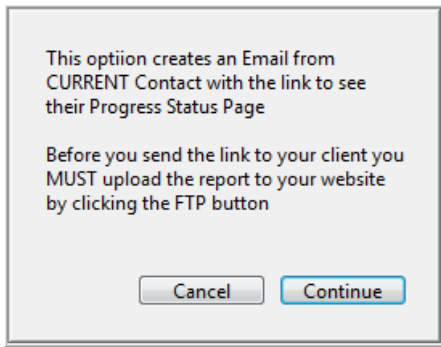
## EMAIL CLIENT WITH THE DISPUTES IN THE PROGRESS STATUS

Once the disputes are posted in your Progress Status page by submitting/uploading them in your internet server, the link of the Progress Status page with the disputes can then be provided.

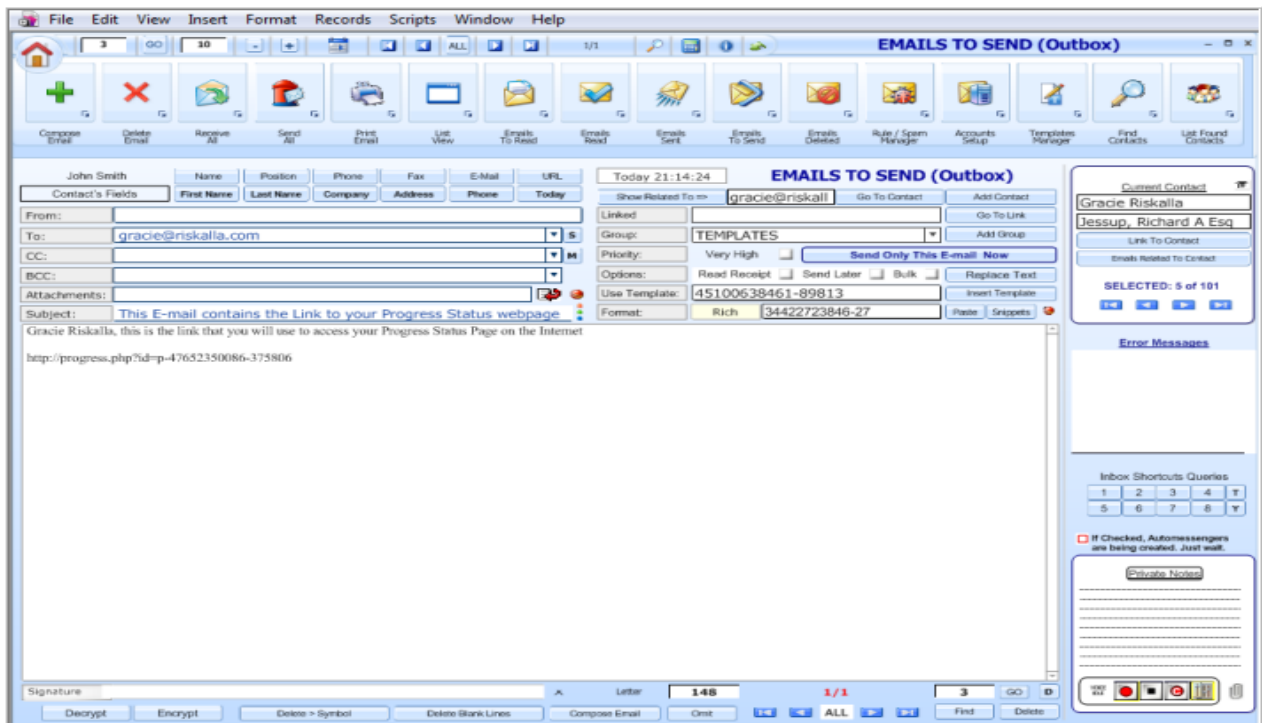
To email selected clients with the link, click the email icon beside the display icon



And click Continue

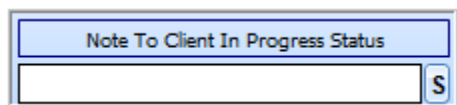


Automatically, you will be directed to the Email System of the software where the required fields are already provided such as the email to be sent and the email of the sender (which is the agent currently logged in) and the subject of the email together with the link of the Progress State you just have uploaded on the internet using the FTP button.



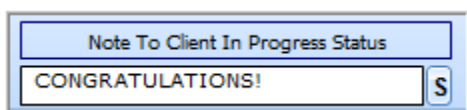
**NOTE TO CLIENT IN PROGRESS STATUS**

For each dispute, you can add a note in the Progress Status page through the Notes section (located at the bottom left part) in the Dispute Center screen.

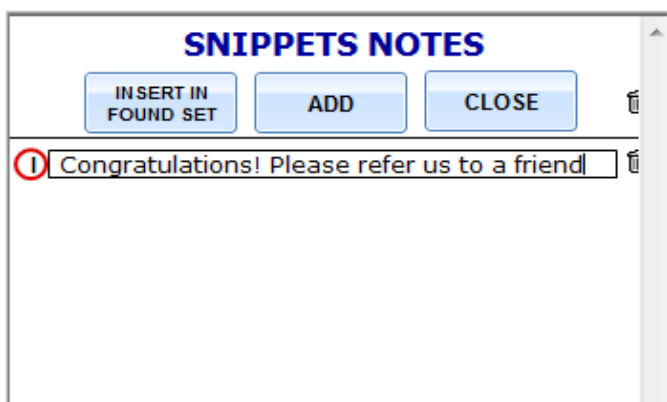


There are two ways on which you can add a note to the client.

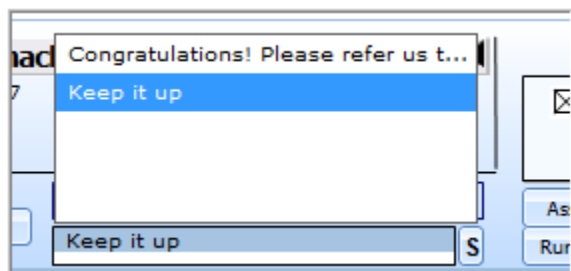
- 1) You can directly enter the note or text into the note field.



- 2) Or go to the Snippet list by clicking the S button. To insert a snippet, click on the I button from the left side of the selected snippet.



Notes from the snippet list can be directly accessed by clicking on the notes field wherein you can select.

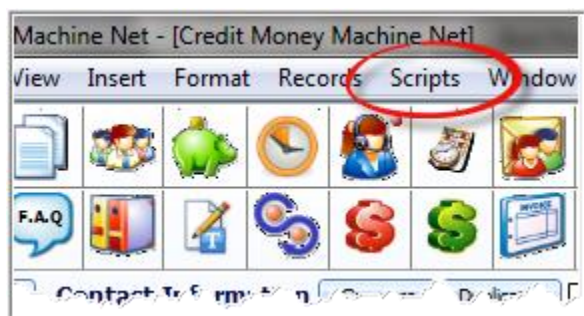


## QUICK ACCESS SCRIPTS

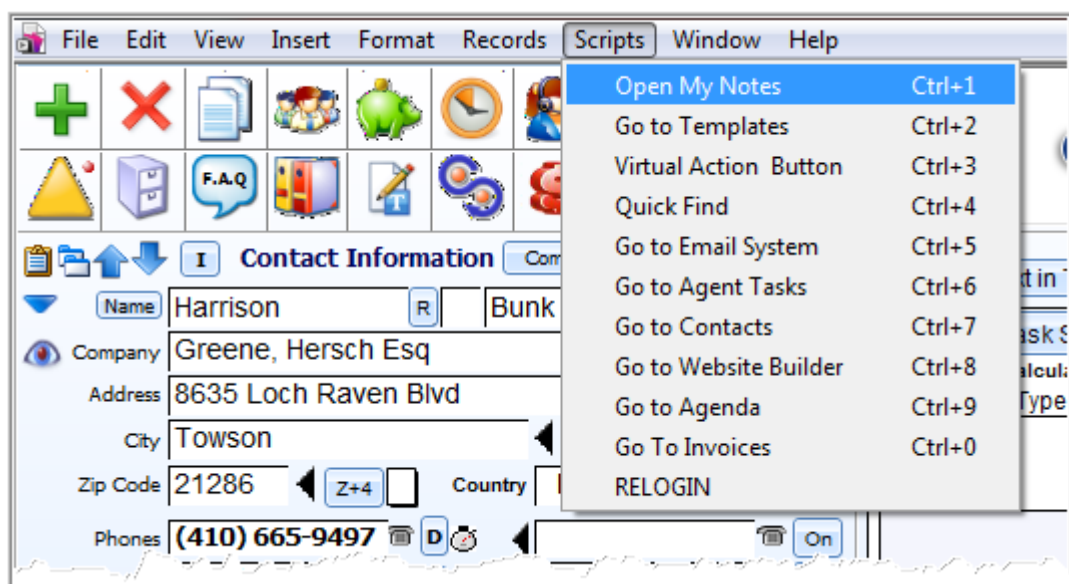


While you can access any area of the software using their corresponding buttons from the main screen, there is also a predefined set of commands for some of the main areas of the software.

For quick access of these areas, click the "Scripts" tab menu.



Under the Scripts tab menu are some of the programs of the software together with their corresponding quick access scripts from which you can select.



## HELP

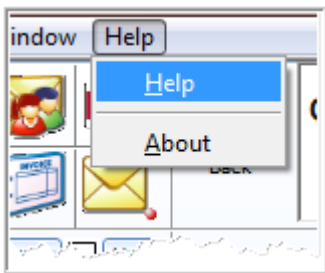
The software has a HELP program also known as the Hands – On Training System which contains all the basic things to know about the software.

There are two ways to access the Hands – On Training System.

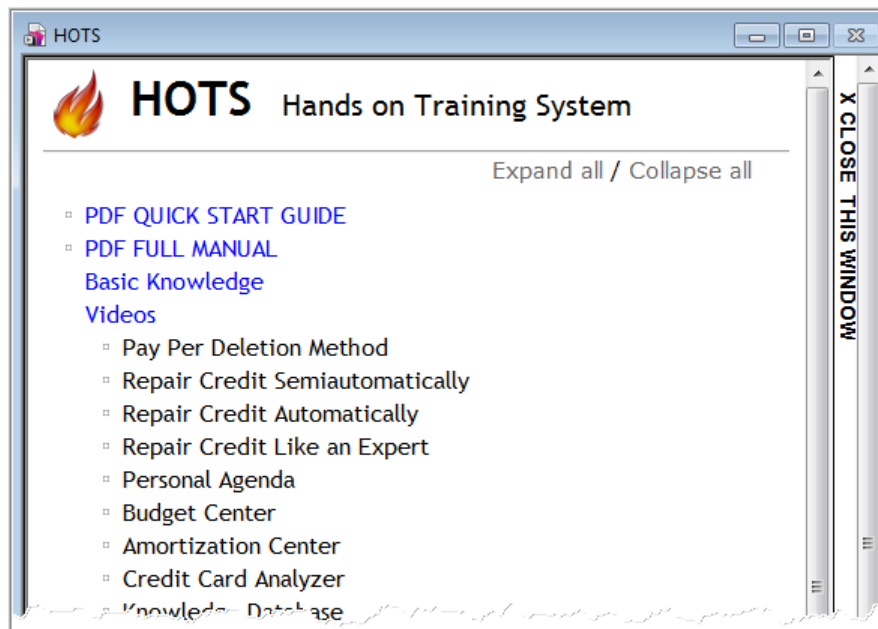
- 1) By clicking the HELP icon (located at the upper part of the main screen Levels 1, 2, and 3.).



- 2) By clicking the HELP tab menu and selecting Help.



Once the 'HOTS' is accessed, you can then select from its list of steps and basic knowledge on the areas of the software. Included in the list are videos that serve as guides on how you can control the given areas of the software.



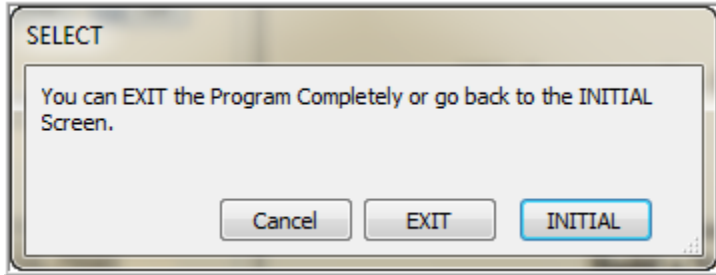
The blue color of the text on the list means that it can still be expanded. To expand, just click and select from the list under it. To expand all from the list at the same time, click the "Expand All". Otherwise, click the "Collapse All" to shrink them all back.

Once you have selected any topic from the list, you will be asked whether to read it in an internal or in an external browser. To read it using the latter, click the CANCEL button.

## EXIT FROM THE SOFTWARE

Once you have finished your transactions in the software, you can exit from the software completely or go to the initial Menu first before exiting from the software completely.

To do this, just click on the Exit button and select from the options on the windows pop up dialog.



## LEVELS OF USE

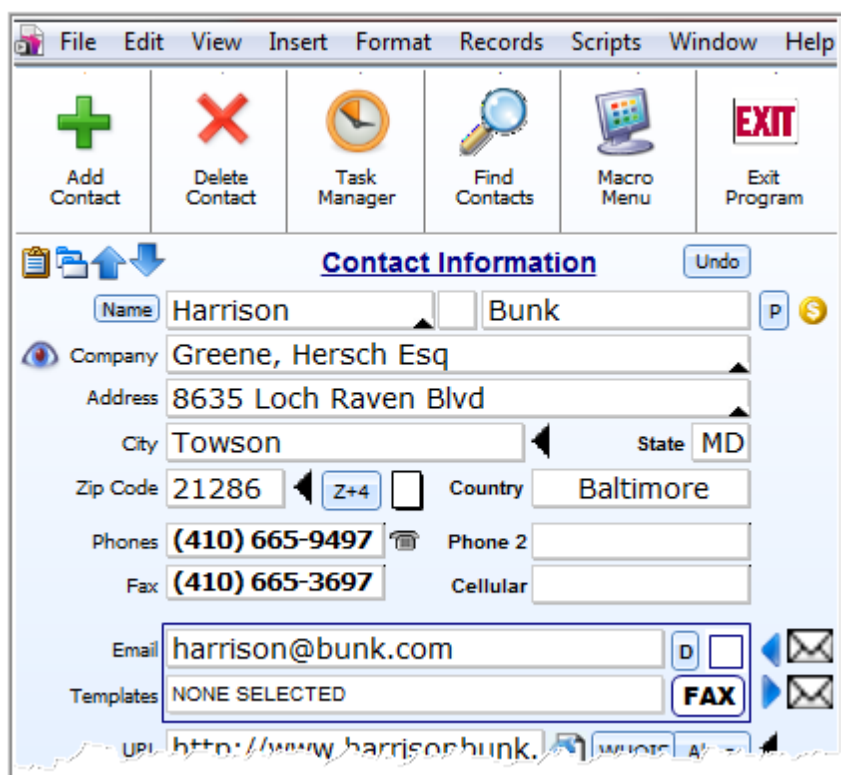
In Credit Money Machine Net there are five use levels that show different features of the program being Level 5 the most advanced of them.

Basically, each level of use affects the contact information and the number of quick icons of some important areas of the software. The number of important areas of the software with their corresponding icons increases as the level of use progresses.

To change the level of use on the software, select from the five buttons (located at the upper right corner of the main screen).



Once the level of use is selected, depending on what level, the number of icons and the contact information fields are affected. Below are the contact information and the icons shown in Level 4.



Ultimately, level 5 being the most advanced is provided with all the powerful functionalities that you can choose from. Mostly all the important areas of the software are presented with their corresponding icons in this level as well as more contact information fields.

Below is a snippet of the contact information section and the all the icons shown in level 5.

The screenshot displays the 'Contact Information' section of a software application. The interface includes a menu bar at the top with options: File, Edit, View, Insert, Format, Records, Scripts, Window, and Help. Below the menu is a toolbar with various icons, including a green plus sign, a red X, a document icon, a group of people, a green piggy bank, a clock, a person with a speech bubble, a calendar, a red 'EXIT' button, a yellow triangle, a purple cube, a blue speech bubble with 'F.A.Q.', a red book, a blue notepad, a blue circular arrow, a red 'S', a green '\$', a blue computer monitor, and a yellow envelope. The 'Contact Information' section itself has a sub-toolbar with icons for a clipboard, a blue arrow, a red arrow, and buttons for 'I', 'Contact Information', 'Compare', 'Duplicates', and 'Undo'. The main form contains the following fields and controls:

- Name:** Harrison Bunk (with a red 'R' icon)
- Company:** Greene, Hersch Esq (with a red 'P' and a blue 'D' icon)
- Address:** 8635 Loch Raven Blvd (with a red 'P' and a blue 'D' icon)
- City:** TOWSON (with a red 'R' icon)
- State:** MD (with a red 'R' icon)
- Zip Code:** 21286 (with a 'Z+4' button and a red 'R' icon)
- Country:** Baltimore (with a 'MAP' button and a red 'R' icon)
- Phones:** (410) 665-9497 (with a red 'D' icon and a red 'On' button)
- Fax:** (410) 665-3697 (with a red 'D' icon and a red 'Off' button)
- E-mail:** harrison@bunk.com (with a red 'D' icon and a red 'On' button)
- Templates:** NONE SELECTED (with a 'FAX' button and a red 'On' button)
- URL:** http://www.harrisonbunk.com (with a 'Whois' button, an 'Alexa' button, and a red 'P' and 'G' icon)

At the bottom left, there is a section labeled 'Other' with a red 'D' icon.

# THE CLIENT'S ADDRESS IN USPS FORMAT

In order to provide the client's address with a USPS standard format with its Zip-4, the software has the Z+4 button on every contact/client information (only on Levels 4 and 5).

**Contact Information** Compare Duplicates Undo

Name: Harrison R Bunk P S

Company: Greene, Hersch Esq P D

Address: 8635 Loch Raven Blvd P

City: Towson State: MD R

Zip Code: 21286 Z+4 Country: Baltimore MAP R

Phones: (410) 605-497 D On

Fax: (410) 665-3697 D Cellular Off

1 E-mail: harrison@bunk.com D

## CHECKING THE ADDRESS

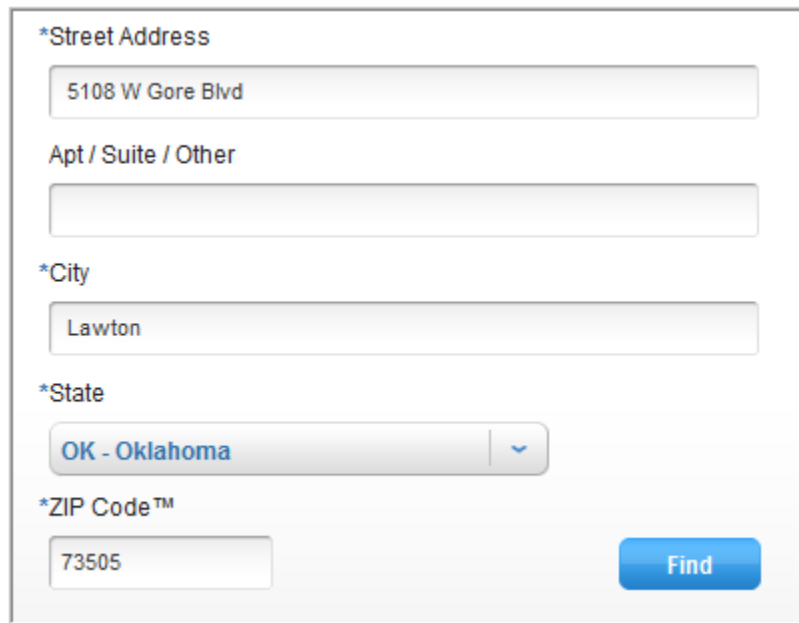
The "Z+4" button is used to check if the inputted address of the client exists in the United States Postal Service database and if it has the correct standard format. To check the address using the USPS website, click on the "Z+4" button first and then select CHECK on the windows dialog pop up.

**Please Select**

You can CHECK this address with the USA Postal Service or if you have an address in your Windows Clipboard (possibly because you copied it from the USPS website) you can IMPORT it.

Cancel IMPORT CHECK

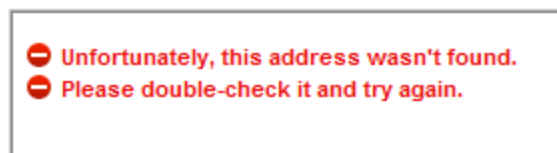
Then, at the center of the main screen, click the Find button with the address of the current contact/client entered on the fields.



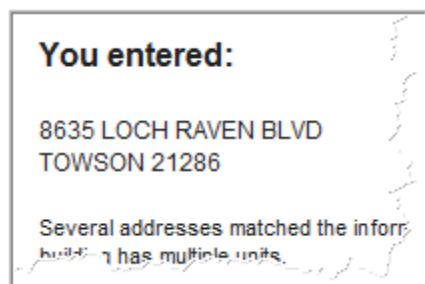
A form for finding an address. It contains the following fields and controls:

- \*Street Address**: A text input field containing "5108 W Gore Blvd".
- Apt / Suite / Other**: An empty text input field.
- \*City**: A text input field containing "Lawton".
- \*State**: A dropdown menu showing "OK - Oklahoma" with a blue arrow icon.
- \*ZIP Code™**: A text input field containing "73505".
- Find**: A blue button with white text.

The software will then check the address using the USPS website. If the address of the client is not found in the USPS database, the website will prompt the following message at the center of the main screen:

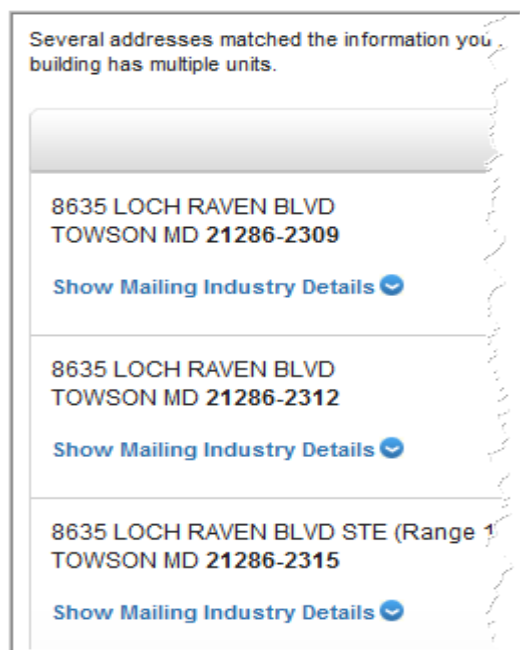


Otherwise, it will give the full address in Standard Format with ZIP-4 wherein you can copy on your windows clipboard and use it to overwrite on the existing address in the contact information address fields.





On the other hand, there are cases when the USPS website finds more than one result of the given address. In these cases, you can select from the results

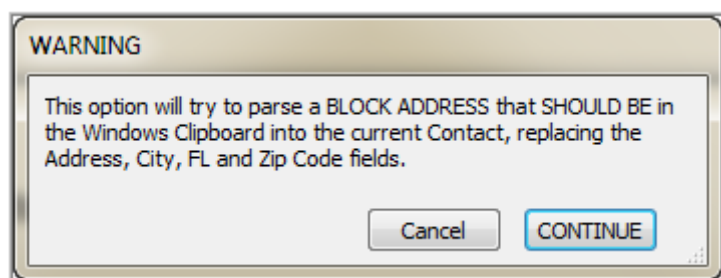


## IMPORTING THE STANDARD USPS ADDRESS RESULT

Once the address of the contact/client is found by the USPS website, you can then copy the given standard format into your windows clipboard and import it using the "Z+4" button.

**Note** that in order to import the standard USPS addresses with Z+4 format correctly, they should be in a corrected two lines address.

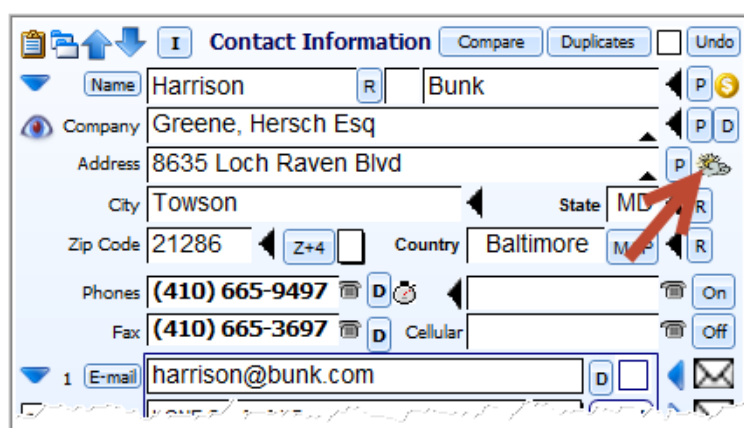
To import the address from your windows clipboard, click the 'Z+4' button with the SHIFT key and click CONTINUE.



Automatically, the standard USPS address format with ZIP-4 that you have copied from the USPS website result will be filled-in in the address fields of your contact/client.

## CHECKING THE WEATHER BASED ON ZIPCODE

To check the current weather as well as the weather for the week from where the client lives based on the zip code on his information field, click the weather icon and then select where to display the weather result.



**Contact Information** Compare Duplicates Undo

Name: Harrison R Bunk P S

Company: Greene, Hersch Esq P D

Address: 8635 Loch Raven Blvd P

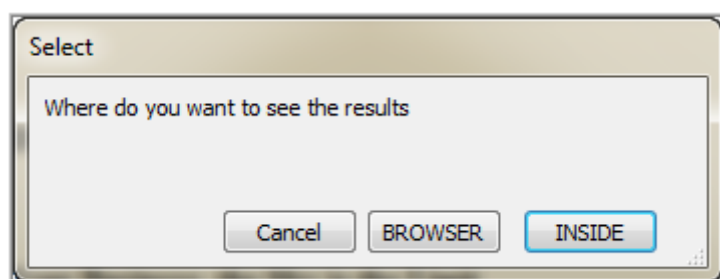
City: Towson State: MD R

Zip Code: 21286 Z+4 Country: Baltimore M R

Phones: (410) 665-9497 D On

Fax: (410) 665-3697 D Cellular Off

E-mail: harrison@bunk.com D



Select

Where do you want to see the results

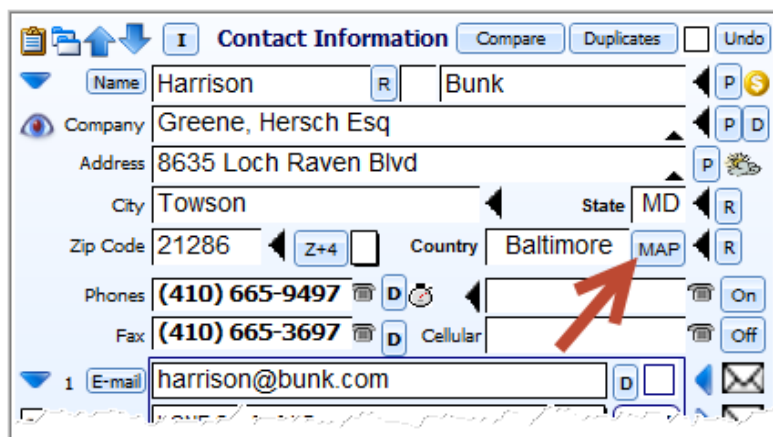
Cancel BROWSER INSIDE

If the selected option is to show the result INSIDE, the result will then be displayed at the center of the main screen. Otherwise, it will open the default browser and display the result from there.

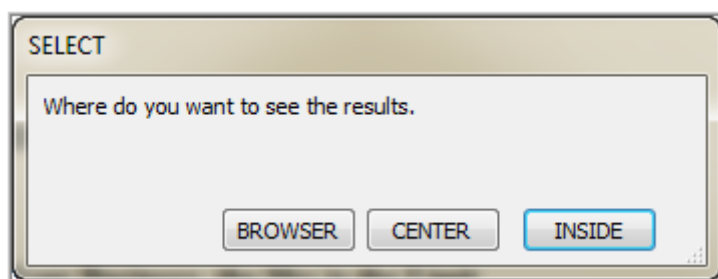
## THE MAP OF THE ADDRESS

Given the standard USPS complete address of the current contact/client, the software can then easily locate the map of the address from MapQuest on the internet.

To show the map of the contact's address, click on the MAP button (located beside the country information field) and select where to display the result.



The screenshot shows a 'Contact Information' form with the following fields: Name (Harrison Bunk), Company (Greene, Hersch Esq), Address (8635 Loch Raven Blvd), City (Towson), State (MD), Zip Code (21286), Country (Baltimore), Phones ((410) 665-9497), Fax ((410) 665-3697), and E-mail (harrison@bunk.com). A red arrow points to the 'MAP' button located next to the 'Country' field.



The screenshot shows a 'SELECT' dialog box with the text 'Where do you want to see the results.' and three buttons: BROWSER, CENTER, and INSIDE. The 'INSIDE' button is highlighted with a blue border, indicating it is the selected option.

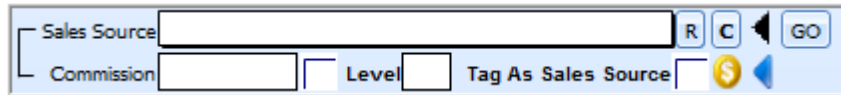
If the selected option is to show the result INSIDE, the result will then be displayed in a browser inside the software. If CENTER is selected, the result will be displayed at the center of the main screen. If BROWSER is selected, the result will be displayed on your default browser.

## INTEGRATED COMMISSION SYSTEM

## ASSIGNING COMMISSIONS TO YOUR SALES PEOPLE AND AFFILIATES

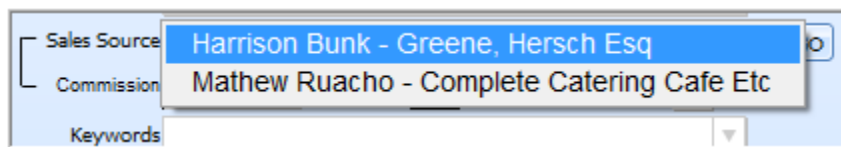
In assigning commissions to your sales people and affiliates, you need to tag them as a sales person.

To do that, check mark the Tag As Sales Source the contact you want to assign (located at the bottom part of the Contact Information section)



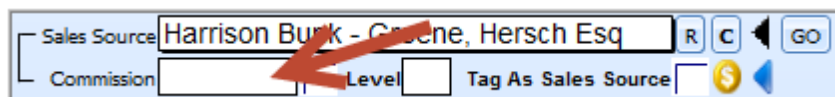
A screenshot of a web form for contact information. It includes fields for 'Sales Source' (a text input), 'Commission' (a text input), and 'Level' (a dropdown menu). To the right of the 'Commission' field is a checkbox labeled 'Tag As Sales Source'. There are also buttons for 'R', 'C', and 'GO'.

Once a contact is tagged as a sales person, the contact will then be included in the Sales Source list.



A screenshot of the 'Sales Source' dropdown menu. The dropdown is open, showing a list of names: 'Harrison Bunk - Greene, Hersch Esq' and 'Mathew Ruacho - Complete Catering Cafe Etc'. The 'Keywords' field is visible below the dropdown.

When you already have assigned a sales source to the current contact, you can type either an integer or a percentage that you want to pay to this sales person in the commission field.



A screenshot of the contact information form. A red arrow points to the 'Commission' field, which is currently empty. The 'Sales Source' field is filled with 'Harrison Bunk - Greene, Hersch Esq'. The 'Tag As Sales Source' checkbox is also visible.

**Note** If you want to assign the sales person of a particular client 10% of all the sales then you will type in the commission field 0.1. If you want to assign a fixed amount, then you will type that amount as long as it is larger than one.

Numbers that are lower than one are considered percentages and larger than one are considered fixed amounts.

Or you can just click on the field and select from the predefined list of integers.

## DISPLAYING THE DOWNLINE LIST

A Downline list is a list of contacts or clients that has the Sales Source selected.

To display the downline list of the current Sales Source, just click on the yellow dollar sign button below the Go button.

Then you will be directed to the Downline List screen.

DOWNLINE ORDERED BY LEVEL AND SALES SOURCE				
Level	Contact Name	Strategy Status	Sales Source Name	Commission % / \$
1	Portia Mcfann - Beachcomber Realty			0%
2	Andrew Fenstermacher - Shafer Commercial Seating Inc	6- DORMANT	Portia Mcfann - Beachcomber Realty	5%
2	Brady Tatum - Bohlin, Cywinski Jackson	6- DORMANT	Portia Mcfann - Beachcomber Realty	5%
2	Gracie Riskalla - Jessup, Richard A Esq	4- HOT LEAD	Portia Mcfann - Beachcomber Realty	10%
2	Helga Rio - Pony Express	4- HOT LEAD	Portia Mcfann - Beachcomber Realty	10%
2	Shirley Keams - Transport Workers Un Aff Cio	5- SALE LOST	Portia Mcfann - Beachcomber Realty	5%
2	Willie Coughenour - Adams Rib Rstrnt At Norwalk	1- WARM LEAD	Portia Mcfann - Beachcomber Realty	10%
2	Lashawn Mariska - Goldstein, Phillip	1- WARM LEAD	Portia Mcfann - Beachcomber Realty	20%
2	Linda Golda - Parham, J Randolph Esq	2- QUALIFIED LEAD	Portia Mcfann - Beachcomber Realty	20%
2	Tyler Hendershott - Rappaport Hertz Cherson		Portia Mcfann - Beachcomber Realty	10%
2	Guillermo Bramhall - West, J Kevin Esq		Portia Mcfann - Beachcomber Realty	10%
2	Pattie Brudnicki - J Gilbert Parrish Jr	3- PRESENTATION	Portia Mcfann - Beachcomber Realty	5%
2	Stewart Sheakley - Chase Communications Group Ltd	5- FULFILLMENT	Portia Mcfann - Beachcomber Realty	15%
2	Antionette Shooobridge - Dolfin International	5- FULFILLMENT	Portia Mcfann - Beachcomber Realty	15%

## SELECT IMMEDIATE DOWNLINE OF SALES PERSON

To select and display the information of the immediate downline of the current Sales Person, click on the yellow dollar button with SHIFT.

The screenshot shows a 'Contact Information' form with the following fields and values: Name (Clark Strothmann), Company (Dann Ocean Towing Inc), Address (16 Filmore Pl), City (Freeport), State (NY), Zip Code (11520), Country (Nassau), and Phones ((516) 223-1706). A red arrow points to a yellow dollar button with a 'P' and 'S' icon, located next to the State field.

On the other hand, to select and display the information of the immediate downline of the Sales Source, click on the yellow dollar button with SHIFT beside the Commission area (located at the bottom part of the Contact Information section)

The screenshot shows the 'Sales Source' and 'Commission' section of the form. The Sales Source field contains 'Harrison Bunk - Greene, Hersch Esq'. The Commission field is empty. A red arrow points to a yellow dollar button with a 'P' and 'S' icon, located next to the Commission field.

## TRIGGERED COMMISSIONS TO THE SALES PERSON WHEN INVOICES ARE PAID

The software also has an integrated commission system with unlimited levels that is triggered when invoices are paid, automatically creating a corresponding entry in Accounts Payable.

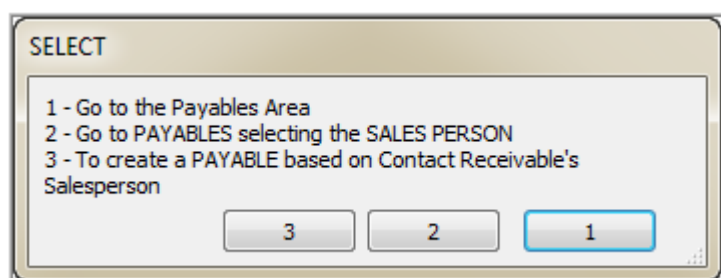
To see the corresponding entry of the invoice by the current client, click on the Accounts Payable icon (only available in level 5)



Or under the 'Financial' tab (located at the right part of the main screen)



Then click the button number 2 to show only the entries with the Sales Person of the current contact.



Now you should be in the Account Payables screen with the entries of the downline of the current Sales Person.

**ACCOUNT PAYABLES**

Main Filter Reports Shortcuts Commissions Contact Selected Helga Rio Pony Express 6 of 101

Add Payable
 Delete Payable
 Duplicate Payable
 Find Payable
 Find Contact
 1 Line View
 Go To Receivables
 Go To Invoices
 Copy To Clipboard
 Find Due Payables

NONE SELECTED SEND

- Recurrent Info - Total: **\$625.00** ID: 84128260877-7134

Contact / Payor	Date Paid	RT	Every	+Times	Date Due	Amount	Running Due	Status	S	Omit		
Andrew Fenstermacher - Shafer			1	Month	12/23/11	<b>\$300.00</b>	\$300.00	DUE	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Private Notes: From Invoice # 10005 for \$2,000.00 Helga Rio ( Commission Amt. : \$300.00 based on: 15% )

Payment Notes:

Check Memo: Create Check To Pay For This Comm. Helga Rio (Invoice : 10005)

Date Amount PMT# DOC# Related Document # 10005 GO

---

Andrew Fenstermacher - Shafer All Hold Paid Due GO

Private Notes: From Invoice # 10006 for \$1,500.00 Helga Rio ( Commission Amt. : \$225.00 based on: 15% )

Payment Notes:

Check Memo: Create Check To Pay For This Comm. Helga Rio (Invoice : 10006)

Date Amount PMT# DOC# Related Document # 10006 GO

---

Andrew Fenstermacher - Shafer All Hold Paid Due GO

Private Notes: From Invoice # 10007 for \$500.00 Shirley Keams ( Commission Amt. : \$100.00 based on: 20% )

Payment Notes:

Check Memo: Create Check To Pay For This Comm. Shirley Keams (Invoice : )

Date Amount PMT# DOC# Related Document # GO

Total: **\$625.00**

Notice that the name of the Sales Person is written in its designated field together with the contacts assigned with the commissions (located on top of the Private Notes field).

The commission amount of the sales person is located in the Private Notes field of every entry.

**Private Notes**

From Invoice # 10005 for \$2,000.00 Helga Rio ( Commission Amt. : \$300.00 based on: 15% )

Group / COA

## COMMISSION SECTION INSIDE THE INVOICE SYSTEM



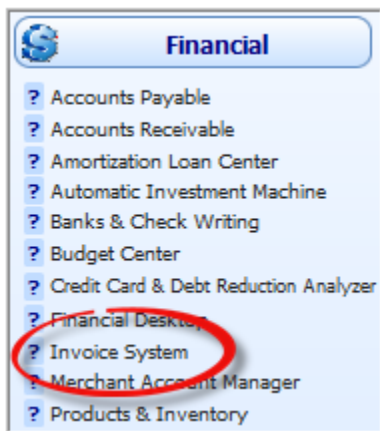
When you go to the Invoice System and create an invoice for the current sales person/contact, automatically you will see that below the notes field, there is an area designed or dedicated to the commissions.

You have four ways to enter into the Invoice System with the current contact:

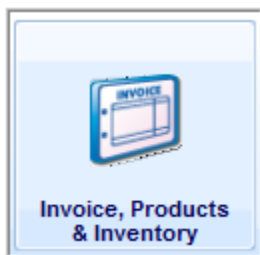
- 1) First, click the Invoice System icon (only available in level 5).



- 2) Or under the 'Financial' tab (located at the right part of the main screen)



- 3) Or by clicking the Invoice button in Level 3



Then click the button number 1 to select invoices of the current sales person/contact.

1 - Go to Invoices selecting invoices from current Client.

2 - Select Invoices from Selected Clients

3 - Go to Invoices preserving the previous Invoice group selection.

- 4) At the bottom part of the main screen, there is an Invoices tab for every contact. Under the Invoices tab are the invoices created for the contact.

Qty =	2	Due =	\$3,500.00	Paid =	\$3,500.00	NOTES	HISTORY	DOCUMENTS	EMAILS	INVOICES	PROGRESS	LIST	UDG
Invoice #	Date	Due On	Terms	Pay Method	Shipped Via	Tracking	Weight	Status	Total	Balance			
10006	12/23/11	12/23/11					0.0	PAID	\$1,500.00	\$1,500.00	GO		
						12/23/2011 11:50:56 PM Fri - JOHN SMITH					+		
						INVOICE # 10006 WAS PAID ON 12/23/2011					S		
10005	12/23/11	12/23/11					0.0	PAID	\$2,000.00	\$2,000.00	GO		
						12/23/2011 02:29:26 PM Fri - JOHN SMITH					+		
						INVOICE # 10005 WAS PAID ON 12/23/2011					S		

To go to the Invoice System, you can click on the GO button from the list of invoice entries under the Invoices tab.

NOTES	HISTORY	DOCUMENTS	EMAILS	INVOICES	PROGRESS	LIST	UDG
Tracking	Weight	Status	Total	Balance			
	0.0	PAID	\$500.00	\$500.00	GO		
12/23/2011 04:09:14 PM Fri - JOHN SMITH					+		
INVOICE # 10007 WAS PAID ON 12/23/2011					S		

You will then be directed to the Invoice System screen with the invoices of the current contact.

Notice that under the Notes field of the Invoice System screen is the Integrated Commission System section

In the Integrated Commission System section inside the Invoice System, you can display the contact information of the Sales Source of the sales person by clicking on the GO button.

To go to the Account Payables with the entries having the current Sales Source, click on the Payables button.

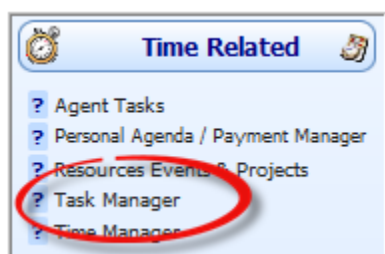
## TASK MANAGER

The Task Manager is part of the software where all the tasks for a given contact assigned to a particular agent are managed. It has a special feature where it can assign one or several tasks to other agents as well.

To access the Task Manager, click the Task Manager button in Levels 1, 2, and 3 of the software



Or the Task Manager link under the Time Related tab

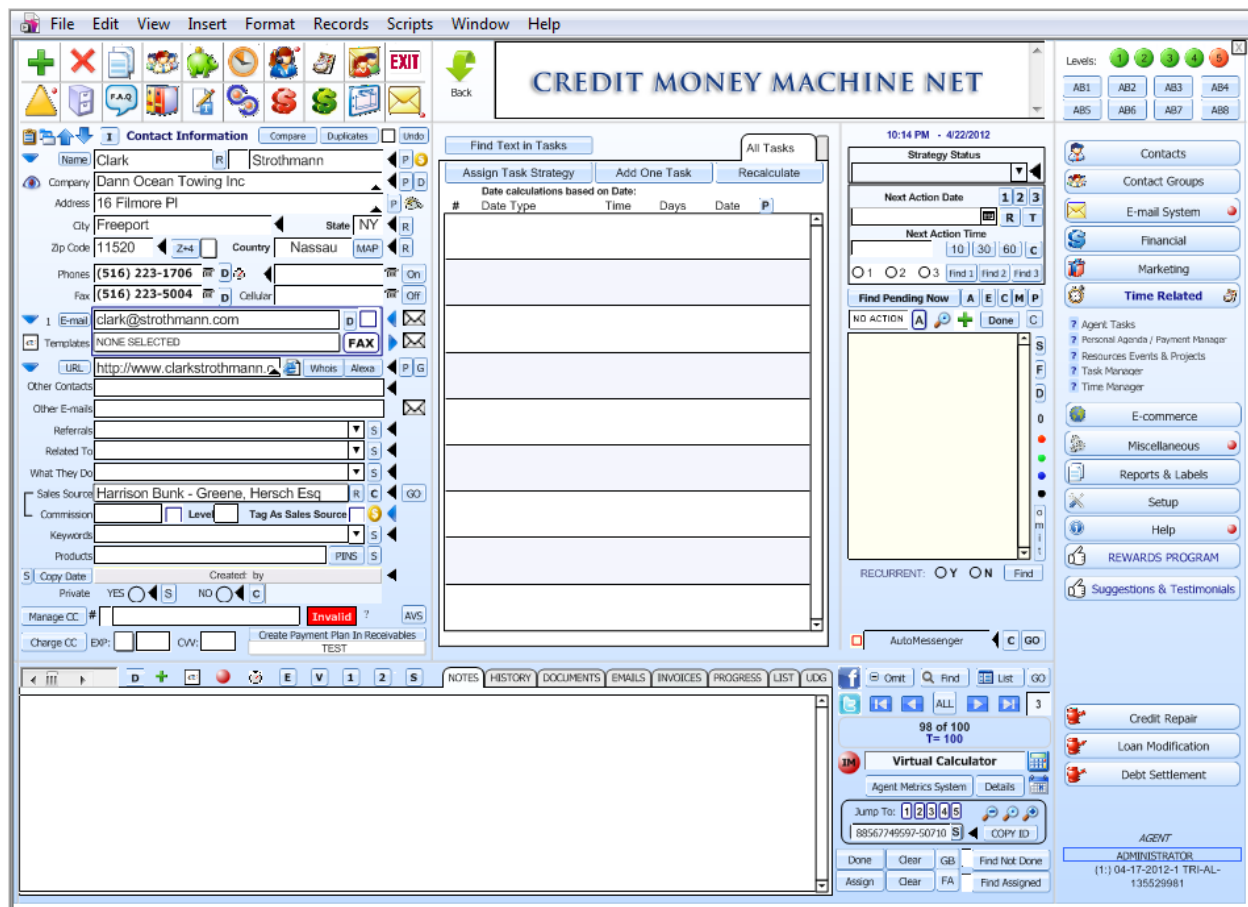


Or the Task Manager icon in Levels 4 and 5 located at the top left of the main screen



**Note** that the Task Manager is displayed ON the main screen once accessed without going inside the software.

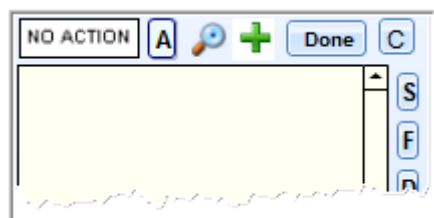
Below is the Task Manager in Level 5.



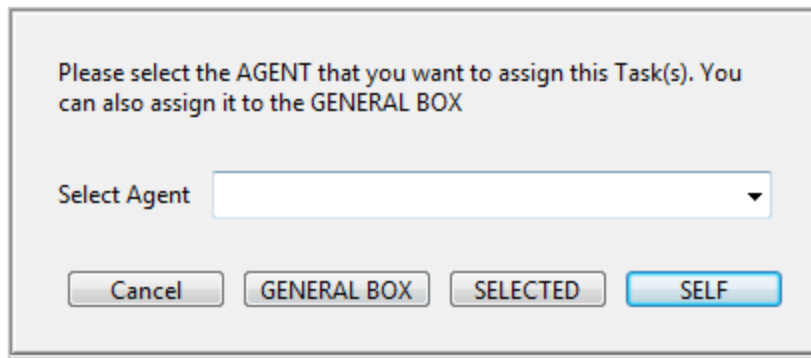
## ADDING A TASK

### USING THE GREEN PLUS BUTTON

To add a new task, just click the green plus button in the Task Manager area.



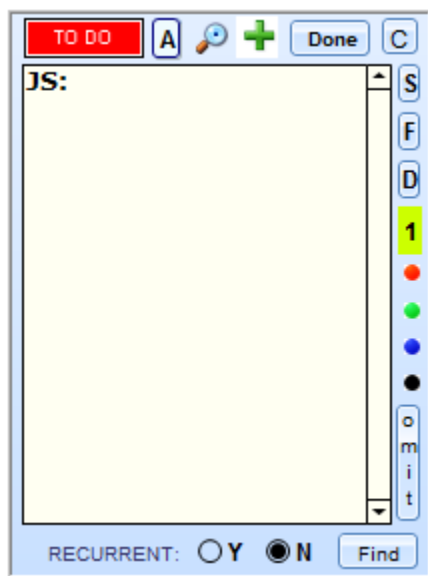
Then select the agent to assign the task.



**Note** that assigning the task to SELF means assigning it to the currently logged on agent of the software and assigning the task to the GENERAL BOX means assigning it to ALL the agents of the software.

On the other hand, to select other agents, select from the drop down menu and click SELECTED.

Once adding task is successful, the INITIALS of the selected agent are written inside the task box as well as in the task list. In the example, the selected agent is John Smith. Hence,

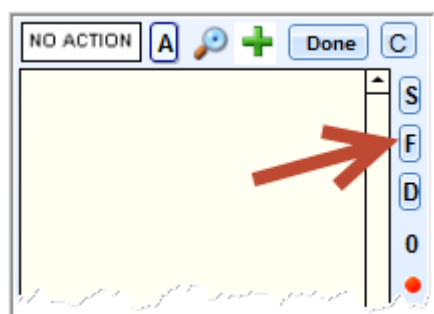


Then click on the task box to write the task with regards to the current contact.

## USING THE F BUTTON

The F button stands for FOLLOW UP which is usually used when you have some descriptive notes for the task.

To add a task using this option, click the F button.



Automatically, the task will be scheduled for TODAY with the default task "Follow Up (See Notes)".



So instead of having to put the task in the task box, you can have it in the Notes area under the current contact's Contact Information Section.

04/22/2012 10:21:15 PM Sun - JOHN SMITH  
LIST ALL AVAILABLE SCHEDULE OF FLIGHTS

To ADD notes for this client, click the green plus button above the notes text field.

04/22/2012 10:21:15 PM Sun - JOHN SMITH  
LIST ALL AVAILABLE SCHEDULE OF FLIGHTS

Enter the note in the Notes field and click SAVE.

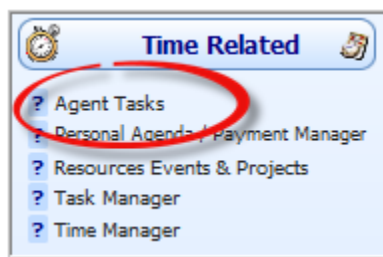
LIST ALL SCHEDULE OF ACTIVITIES



**Note** that this is a very different approach of creating a personal task just like in PERSONAL AGENDA in a way that using the software's TASK MANAGER, the tasks are created for you to do to the client linked to it.

Also, in principle, you can have several tasks to do to one client for different agents. For instance, a particular client has different issues to each of the agents. Each agent can create a task assigned to him on the particular client and so on. Thus, the Task Manager is provided for the client but is assigned to an agent.

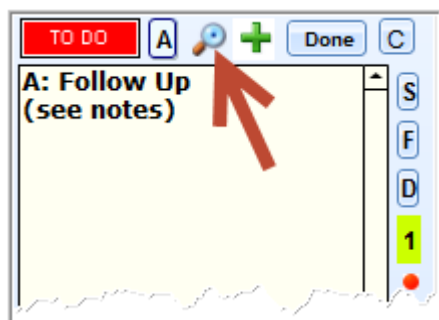
There is an Agent Task in the software that is designed exclusively to have tasks for agents (which can be accessed under the Time Related button of the main screen in Levels 4 and 5).



## TASK SCHEDULER LIST

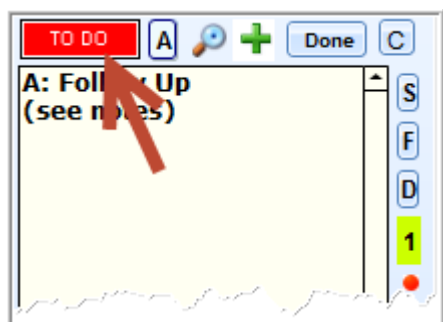
All the task created that is to do to a certain client are displayed in one list called Task Scheduler List. This list is particular to a client with the agents assigned to them.

To open/close the Task Scheduler List, click the magnifying glass icon in the Task Manager.



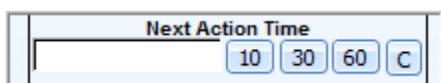
## HOW TO RESCHEDULE TASK

Ultimately, when a task is created, it is automatically scheduled to be done the day it was created and is signified by the label TO DO.

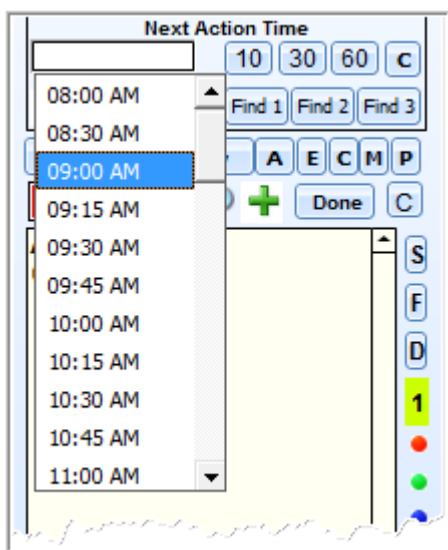


There are several ways to reschedule a task based on the TIME.

- 1) By clicking on the buttons 10, 30, and 60 in the Next Action Time section. The buttons will reschedule the time 10, 30, or 60 minutes after the current time.

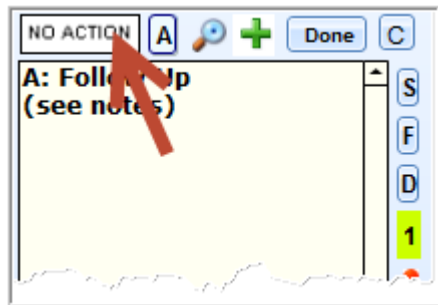


- 2) By clicking on the time field and selecting from the given default time list.

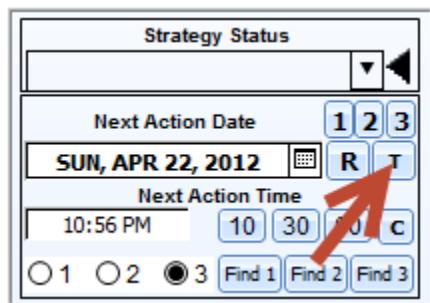


- 3) By manually entering the time based on the software time format HH:MM A.
- 4) By clicking on the buttons 10, 30, and 60 with SHIFT key combination. This will add 10, 30, or 60 minutes to the existing time in the time field.

**Note** that once the task is rescheduled, the previous TO DO label will then be NO ACTION. After the designated schedule of the task arrives, the task will then go back to its TO DO label.



On the other hand, you can also reschedule the task based on a particular DAY or Month. There are several ways for this using the T button in the Next Action Date section.



- 1) By clicking on the T button directly. This will set the task to be done to TODAY.
- 2) By clicking on the T button with the SHIFT key combination. This will set the task to be done to NEXT DAY.
- 3) By clicking on the T button with the CONTROL key combination. This will set the task to be done to NEXT WEEK.
- 4) By clicking on the T button with the SHIFT + CONTROL keys combination. This will set the task to be done 30 DAYS MORE.
- 5) By clicking on the calendar icon beside the date field and selecting which date to reschedule the task.
- 6) By manually typing into the date field with the format MM/DD/YYYY.

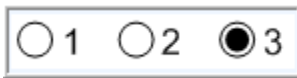
## HOW TO SET PRIORITY TO TASKS

Tasks must be set with specific priorities in order to manage the more important tasks from tasks with less important ones.

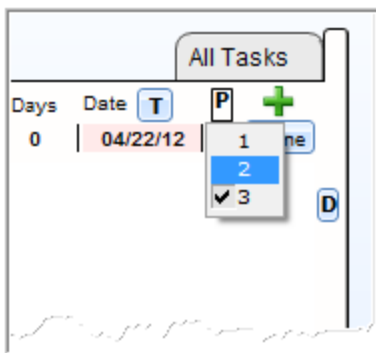
**Note** that the Task Manager has priorities 1 to 3: 1 having the highest priority and 3 having the lowest. When you create a task for a client, the task manager will set the priority of the task to 3 by default.

There are two ways in which you can set priority to a task.

- 1) By selecting from the radio buttons



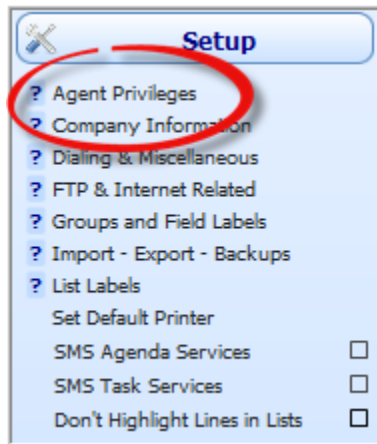
- 2) By the drop down priority list in the Task Scheduler List



## **CHECK TASKS EVERY DESIGNATED MINUTES**

In order to be aware of the TASKS WITH PRIORITY ONE AND HAS TIME to be done while doing some other activities in the software, you can have an automatic checking of tasks that will pop up every designated minutes until you have taken into action the task to be done.

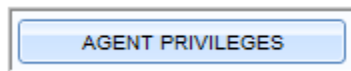
For the software to check the tasks for you and at the same time remind you through pop ups, you need to go the Agent Privileges under the Setup tab in Levels 4 and 5.



Or by clicking the Setup icon at the upper part of the main screen in Levels 1 to 3



and selecting Agent Privileges button.



At the bottom left of the Agent Privileges area, there is a CHECK TASKS EVERY column with text field where you have to enter the number of minutes you want the software to check your tasks.

 A screenshot of the 'Agent Privileges' configuration window. At the top, it says 'Be Sure To Hover The Mouse On The Fields To Understand Their Use'. Below this are several fields: 'H.O.P.S. Assigned' (a text box), 'H.O.P.S. Level' (a dropdown menu showing '3'), 'Hours This Agent Can Work' (a text box), 'Leave Empty if you don't want any time restrictions for this Agent' (a checkbox), 'Starts At' (a text box), and 'Ends At' (a text box). To the right of these are several checkboxes and text boxes: 'Receive All Accounts' (checkbox), 'Receive E-mails Every' (text box '0' minutes), 'Send E-mails Every' (text box '0' minutes), 'Check Tasks Every' (checkbox, with a red arrow pointing to it), 'Check Agenda Every' (text box '0' minutes), 'Log Out Agents Every' (text box '0' minutes), 'Can't Find Assigned To General Box' (checkbox), 'RRC' (checkbox), and 'Automessages Won't Trigger When Box Is Checked' (checkbox with a red 'X' in the box). At the bottom are three buttons: 'Start', 'Stop', and 'Events Will Stop Next Login'.

In the case where you want to snooze automatically every 5 minutes and the pop-up will close without any further action, click on the checkbox beside the Check Tasks Every.

Check Tasks Every ☐

Now once the number of minutes is indicated for the software to check the task, click the Start button.

Start

**Note** that the event will only start in the next login. Meaning, you have to logout from the software first and login again.

To log out, go back to the main screen and click Exit button and then select INITIAL.

EXIT

SELECT

You can EXIT the Program Completely or go back to the INITIAL Screen.

Cancel EXIT INITIAL

Once the software starts checking tasks on the designated minutes you have provided, every designated minutes the windows dialog as shown below will pop up for reminder.

You have at least an Task Due with PRIORITY ONE that is DUE  
Do you want to see them now?

SNOOZE 60 SNOOZE 30 SNOOZE 10 SNOOZE 5 YES

## FIND PENDING TASKS

Find Pending Tasks is the same as checking tasks but without having the software do the checking for you in designated minutes. This way you can check the tasks all by yourself in any time you want to do them.

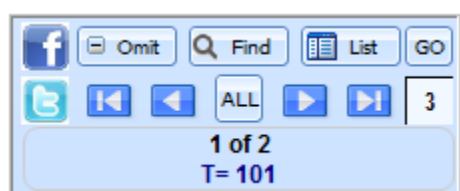
To do this, click the Find Pending Now button.



Then select from whom the tasks you want to find.



The software will then display all the contacts/prospects with tasks of the agent you selected previously (available only Levels 4 and 5) and navigate them using the navigation buttons.



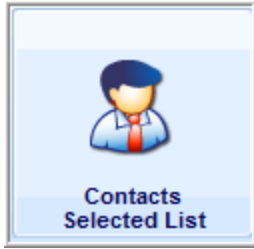
**Note** that the order of Finding Pending Tasks goes by the priority then the date and then the time. This means that if the tasks with the highest priority are first to be displayed.

On the other hand, in the case where all the tasks have the same priority, it will check for the tasks based on who is oldest.

If all the tasks have been created at the same date, it will display by its natural order.

There is also another technique which is to DISPLAY ALL THE FOUND TASKS IN A LIST. There are three ways to do this.

1) By clicking the Contacts Selected List button in Levels 1 and 2 of the software.



- 2) By clicking the Contacts List View button with the SHIFT key combination (located at the upper left corner of the main screen in level 5).



- 3) By clicking the List button on top of the Navigation Bar in the main screen in Levels 3 to 5 of the software.



Although this is not a good technique because it does not directly access the Task List View. Once in the Contacts Selected Found List screen, click the Multiple List View button.



In the Task List View, you can have three different ways to view the tasks by clicking any of these buttons:





In the 1 Line View, the tasks of the agent are displayed all in one line.

File Edit View Insert Format Records Scripts Window Help

Contacts 1 LINE VIEW

Sort By: Next Action Date

Templates: NONE SELECTED

First Name	Last Name	Company	ST	Phone 1	TZ	Email	Next Task Description	A	D	A	E	C	M	P	Next Task Date	P	T	Q	Agent Task	Omit	✓	✓	✓	✓
Clark	Strothmann	Dann Ocean Towing	NY	(516) 223-1706		clark@strothm	A: Follow Up								04/22/12	3	1		JOHN SMITH	Omit				
Portia	McFann	Beachcomber Realty	CA	(858) 294-0682		portia@mcfan	JS: Follow Up								04/24/12	3	1		JOHN SMITH	Omit				
Andrew	Fenstermacher	Shafer Commercial	FL	(850) 584-7434		andrew@fenst	JS: Follow Up								04/24/12	3	1		JOHN SMITH	Omit				
Brady	Tatum	Bohlin, Cywinski	OH	(419) 222-8541		brady@tatum	JS: Follow Up								04/24/12	3	1		JOHN SMITH	Omit				
Gracie	Riskalla	Jessup, Richard A	CA	(916) 344-7735		gracie@riskall	JS: Follow Up								04/24/12	3	1		JOHN SMITH	Omit				
Helga	Rio	Pony Express	OK	(580) 357-0385		helga@rio.com	JS: Follow Up								04/24/12	3	1		JOHN SMITH	Omit				
Shirley	Keams	Transport Workers	MA	(508) 228-6114		shirley@keams	JS: Follow Up								04/24/12	3	1		JOHN SMITH	Omit				
Willie	Coughenour	Adams Rib Rstrmt At	WV	(304) 422-8589		willie@coughe	JS: Follow Up								04/24/12	3	1		JOHN SMITH	Omit				
Lashawn	Mariska	Goldstein, Phillip	KS	(785) 272-6823		lashawn@meri	JS: Follow Up								04/24/12	3	1		JOHN SMITH	Omit				
Linda	Golda	Parham, J Randolph	MI	(616) 451-2797		linda@golda.c	JS: Follow Up								04/24/12	3	1		JOHN SMITH	Omit				
Tyler	Hendershott	Rappaport Hertz	CA	(916) 349-5439		tyler@henders	JS: Follow Up								04/24/12	3	1		JOHN SMITH	Omit				

04/22/2012 10:21:15 PM Sun - JOHN SMITH  
LIST ALL AVAILABLE SCHEDULE OF FLIGHTS

2012 T Apr

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					

by clicking on a date in the Calendar, you will select records that have actions pending for that date or before. Use Shift to select ONLY that date.

In the 3 Lines View, the area has much more space for the tasks so you can basically read the tasks in its entirety.

File Edit View Insert Format Records Scripts Window Help

3 10 1 of 11

CONTACTS 3 LINE VIEW

Sort By: Next Action Date

Contacts A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Add Contact
 Delete Contact
 Go To Templates
 Multi-Task View
 1 Line View
 Selectable Fields View
 Find Contact
 Find Text in Tasks
 Find Pending Now
 Go To Reports

Templates: NONE SELECTED

Create Email List In Windows Clipboard

First Name	Last Name	Company	ST	GO	Phone /Cellular	TZ	Next Task	A	D	Tasks	Next Task Date	P	T	Omit	Checkboxes
Clark	Strothmann	Dann Ocean Towing Inc 16 Filmore Pl Freeport NY 11520			(516) 223-1706		A: Follow Up (see notes)			1	04/22/12				JOHN SMITH
Portia	McFann	Beachcomber Realty 4891 Pacific Hwy San Diego CA 92110			(858) 294-0682		JS: Follow Up (see notes)			1	04/24/12				JOHN SMITH
Andrew	Fenstermacher	Shaffer Commercial Seating Inc 2400 N Jefferson St Perry FL 32347			(850) 584-7434		JS: Follow Up (see notes)			1	04/24/12				JOHN SMITH
Brady	Tatum	Bohlin, Cywinski Jackson 710 N Cable Rd Lima OH 45805			(419) 222-8541		JS: Follow Up (see notes)			1	04/24/12				JOHN SMITH
Gracie	Riskalla	Jessup, Richard A Esq 5345 Madison Ave Sacramento CA 95841			(916) 344-7735		JS: Follow Up (see notes)			1	04/24/12				JOHN SMITH
Helga	Rio	Pony Express 5108 W Gate Blvd Lawton OK 73505			(580) 357-0385		JS: Follow Up (see notes)			1	04/24/12				JOHN SMITH
Shirley	Keams	Transport Workers Un Aff Co 6111 Water St			(508) 228-6114		JS: Follow Up (see notes)			1	04/24/12				JOHN SMITH

Delete Empty Lines

NOTES HISTORY DOCUMENTS EMAILS INVOICES PROGRESS LIST LOG

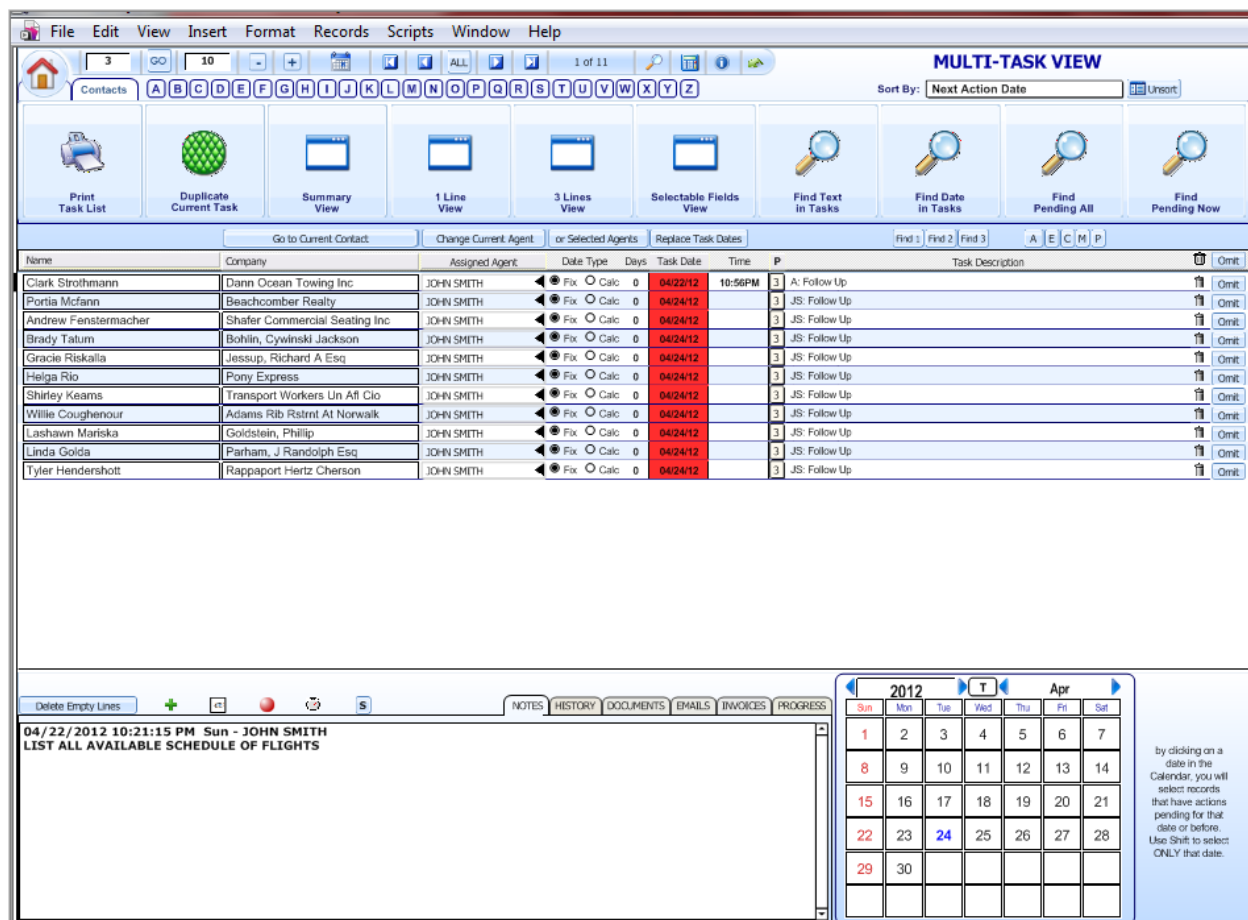
04/22/2012 10:21:15 PM Sun - JOHN SMITH  
LIST ALL AVAILABLE SCHEDULE OF FLIGHTS

2012 Apr

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					

by clicking on a date in the Calendar, you will select records that have actions pending for that date or before. Use Shift to select ONLY that date.

In the Multi-Task view, the area gives more emphasis on the tasks containing important fields relevant to contact, assigned agent, and tasks.

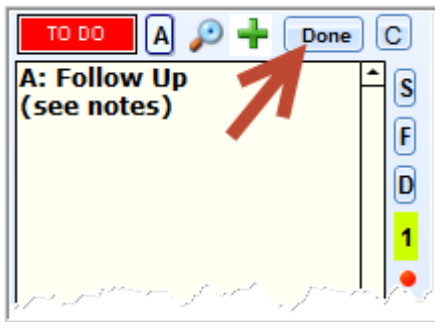


## HOW TO DISPOSE TASKS

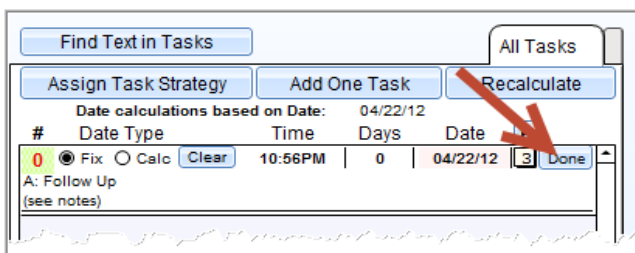
There are several reasons why you want to dispose a task. One of the most basic reasons is if you have already done the task for the client. The same way, you can also have several ways in disposing a task.

Specifically, the software has four ways to dispose the task.

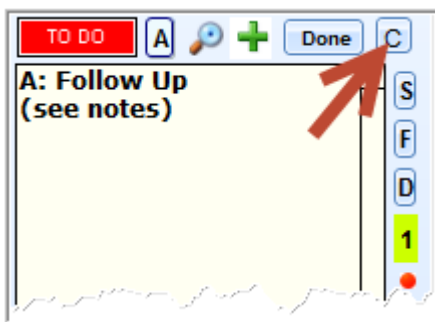
- 1) By clicking the DONE button of the task that is in the Task Box. Usually, the task contained inside the said task box is the task with the highest priority among the others.



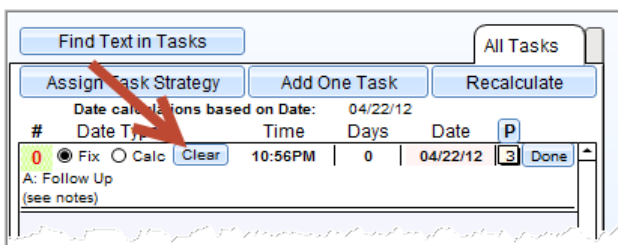
The DONE button can also be found on each of the tasks in the Task Scheduler List where you can directly dispose other tasks that are not in the task box.



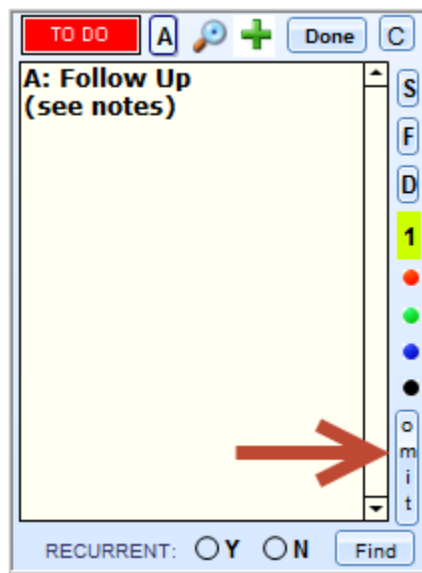
2) By clicking either the C button of the task that is in the Task Box



or the CLEAR button on each task in the Task Scheduler List.



- 3) By clicking the OMIT button of the task that is in the Task Box.



**Note** that omitting a task doesn't mean the task is deleted from the Task Manager. It only temporarily deletes the task and can be retrieved anytime.

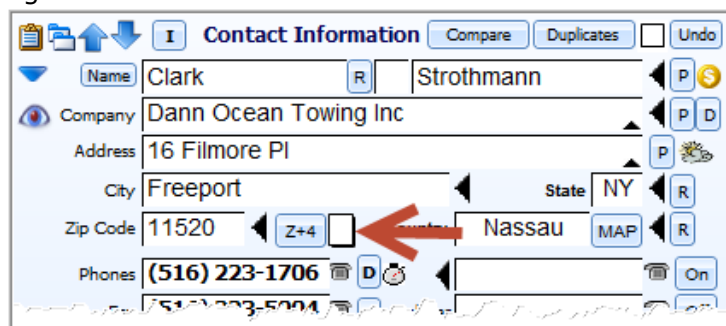
- 4) By rescheduling the task. This way, it is as if you have created a new task by just overwriting the content of the task with the old one.

## FINDING AND SELECTING TASKS

There are several ways to find contacts that are designated with tasks to be done by an assigned agent.

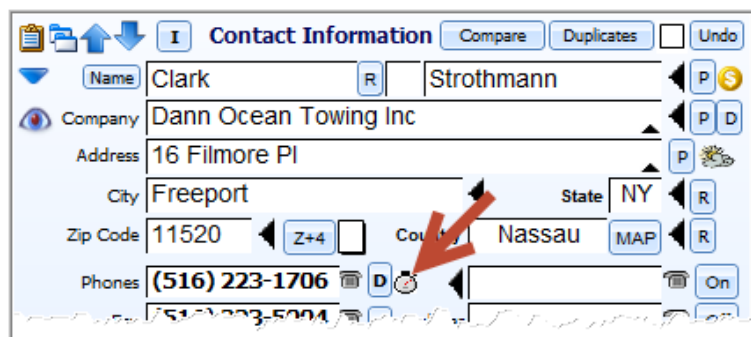
- 1) By finding based on time zones: E (Eastern), C (Central), M (Mountain), P (Pacific)

**Note** that before using this option; make sure that the client or prospects that agents have tasks for have been set with a time zone on his/her contact information.

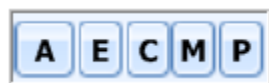


If the time zone wasn't provided at the time the client was added in the software, you can click the clock icon to know the time based on the client's phone number area code.

To set the times zones of all the selected contacts at the same time, click the icon with the SHIFT key combination.



Now to find and select contacts with tasks assigned to an agent based on time zone, just select from the E, C, M, or P buttons

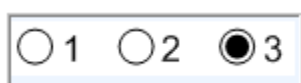


The A button, however is used to find and select all the due and future tasks.

2) By the priority number.

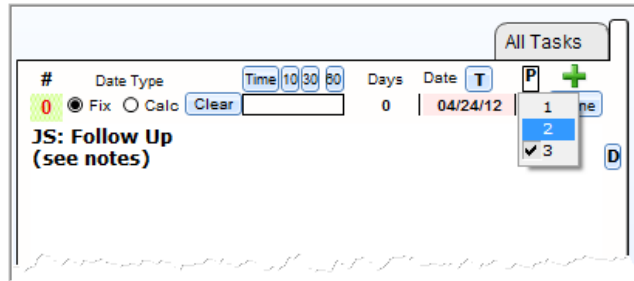
**Note** that when adding a task, by default, its priority is set to 3. Now to change its priority, you have two ways:

a. By selecting from the radio buttons

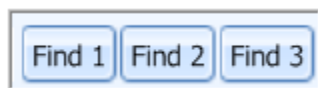


This is the case if you want to change the priority of the task that is in the task box.

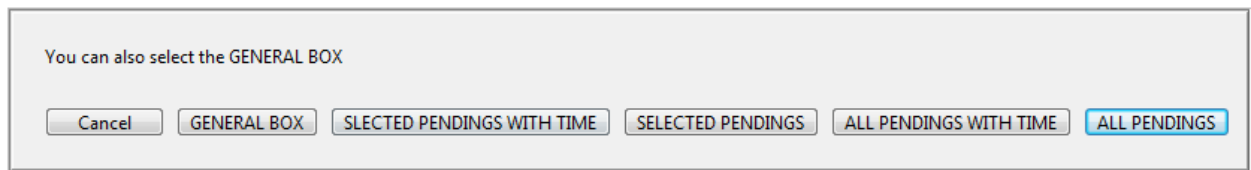
- b. By the drop down priority list in the Task Scheduler List



Now to find and select tasks based on their priority, click from the Find 1, Find 2, or Find 3 buttons.



Then select what kind of tasks

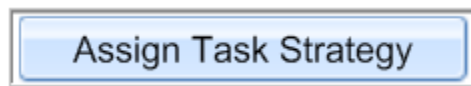


## ASSIGNING STRATEGY TASKS

In order to be consistent of assigning tasks for clients; just click on the 'A' button beside the task status label.

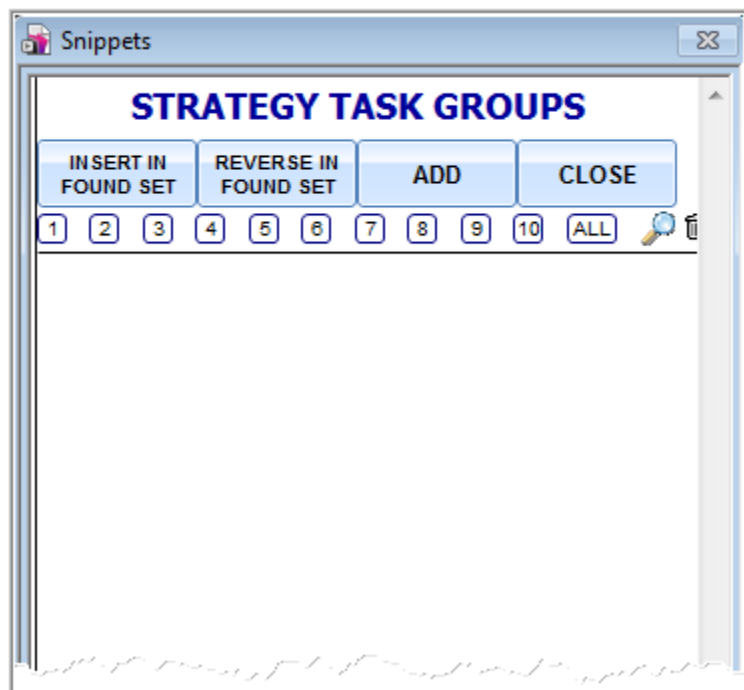


Or the Assign Task Strategy button in the Task Scheduler List

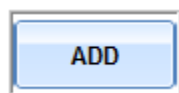


The tasks created using this are called STRATEGY TASKS. Strategy tasks are tasks that are grouped in order to utilize the time of adding tasks one by one. Usually tasks are grouped because they are under the same task category or they are tasks that are related to each other and must be done consecutively.

Now you will be presented a snippet window where you can add the Strategy Tasks.



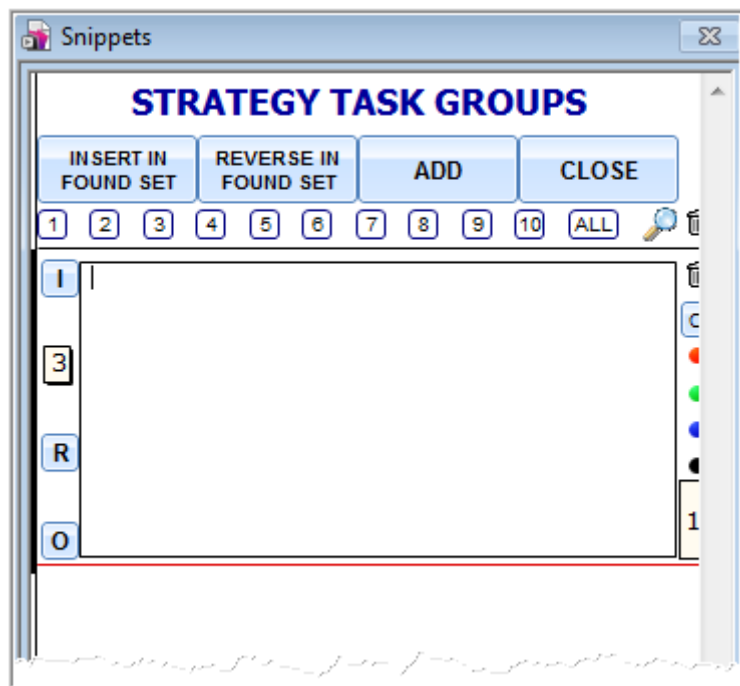
To add strategy tasks, click the Add button.



**Note** that once a group of strategy tasks are added, it will remain in the snippet window unless deleted. So next you open the snippet window of strategy task groups again, the strategy tasks that were previously added will be included in the existing list.



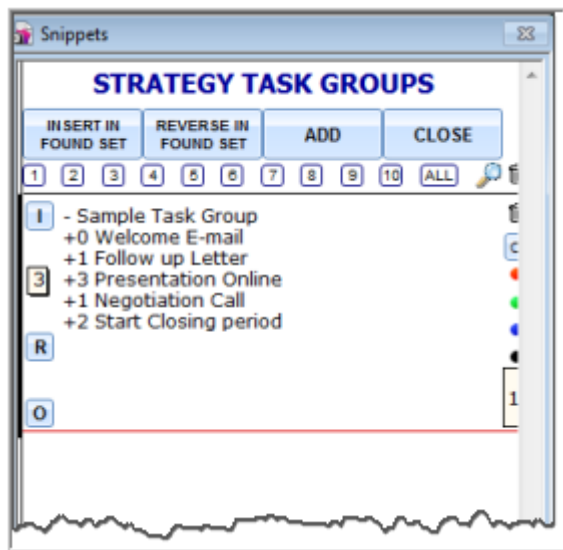
Then, add the strategy tasks in the field that is provided once the Add button is clicked.



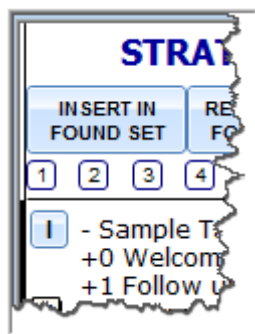
You can enter many ACTIONS in one Snippet or manually one per line for a complete Sales Strategy Cycle in one click.

- If you precede TASKS (lines) with a dash (-) then it becomes a Title and it won't be considered a task.
- If, in a title you put a code between double square brackets like `[[LENDER1]]` then that code is considered like a set. In other words, different sets will be treated independently, test and check for yourself how powerful is this feature.
- A + sign and a number then the TASK will be scheduled AUTOMATICALLY based on those numbers (days in between actions).
- The numbers at the beginning of TASKS (lines) indicate days in between actions.
- Also, it is possible to use symbols for many contact fields like in the Template Manager. Therefore, `<<UDF 01>>` will be replaced by the content of the User Defined Field 01 for example.

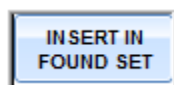
For example, we enter the following strategy tasks:



Once the strategy tasks are added, you can then insert them into the Task Manager using the 'I' button of the particular Strategy Task Group.



Or if you want to insert the current group of strategy tasks to ALL the selected clients, click the Insert In Found Set button.



Now when either the 'I' or Insert Found Set buttons are clicked, the next thing to do is select the agent that will be assigned to the tasks for the client/s.

Please select the AGENT that you want to assign this Snippet. You can also assign it to the GENERAL BOX

Select Agent

The tasks will then be added to the selected client/s Task Scheduler List with the number of days in between the tasks.

Find Text in Tasks All Tasks

Assign Task Strategy Add One Task Recalculate

Date calculations based on Date: 02/05/12

#	Date Type	Time	Days	Date	P
1	<input checked="" type="radio"/> Fix <input type="radio"/> Calc <input type="button" value="Clear"/>		0	02/05/12	<input type="button" value="3"/> Done
JS: Follow Up (see notes)					
2	<input checked="" type="radio"/> Fix <input type="radio"/> Calc <input type="button" value="Clear"/>		0	02/05/12	<input type="button" value="3"/> Done
JS: FOLLOW UP BY PHONE					
3	<input type="radio"/> Fix <input checked="" type="radio"/> Calc <input type="button" value="Clear"/>		0	02/05/12	<input type="button" value="3"/> Done
JS: Welcome E-mail					
4	<input type="radio"/> Fix <input checked="" type="radio"/> Calc <input type="button" value="Clear"/>		1	02/06/12	<input type="button" value="3"/> Done
JS: Follow up Letter					
5	<input type="radio"/> Fix <input checked="" type="radio"/> Calc <input type="button" value="Clear"/>		3	02/09/12	<input type="button" value="3"/> Done
JS: Presentation Online					
6	<input type="radio"/> Fix <input checked="" type="radio"/> Calc <input type="button" value="Clear"/>		1	02/10/12	<input type="button" value="3"/> Done
JS: Negotiation Call					
7	<input type="radio"/> Fix <input checked="" type="radio"/> Calc <input type="button" value="Clear"/>		2	02/12/12	<input type="button" value="3"/> Done
JS: Start Closing period					