

Quick Start Guide

Credit Money Machine Pro

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

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 PRO

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:

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

To contact support go to 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

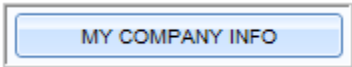
When you install the software for the first time, before being directed to the main screen, you will be displayed a section where you have to enter your company's basic data.

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

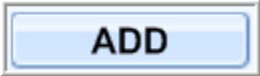
Directly click the Setup icon at the upper part of the software



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.

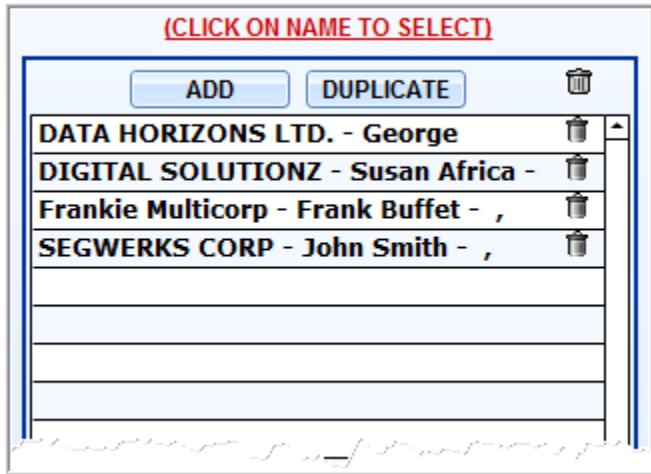


At the center of the screen are company data fields where you have to enter the information about the company.

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.



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



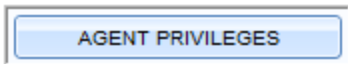
Notice the button beside the field. To assign the company reflected in the field, just click the ASSIGN CURRENT AS DEFAULT COMPANY button.

ENTERING BASIC AGENT INFORMATION

To enter basic agent information in the software, go to SETUP. Directly click the Setup icon at the upper part of the software



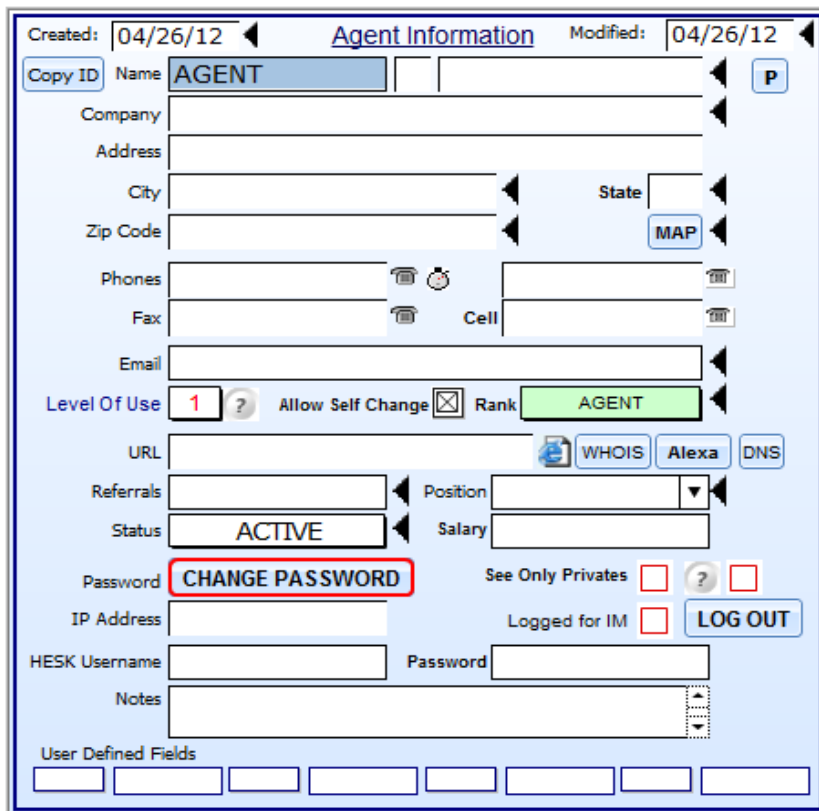
Once in the Setup, click the AGENT PRIVILEGES button.



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 Cell

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 ?

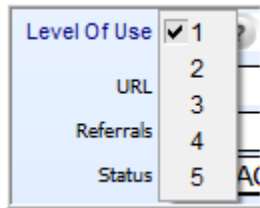
IP Address Logged for IM LOG OUT

HESK Username Password

Notes

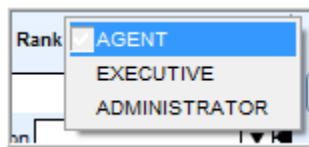
User Defined Fields

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.



A screenshot of a web form showing a dropdown menu for 'Level Of Use'. The menu is open, displaying five options: 1 (checked), 2, 3, 4, and 5. To the left of the menu, the text 'Level Of Use' is visible. Below the menu, there are labels for 'URL', 'Referrals', and 'Status'.

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



A screenshot of a web form showing a dropdown menu for 'Rank'. The menu is open, displaying three options: AGENT (checked), EXECUTIVE, and ADMINISTRATOR. The label 'Rank' is visible to the left of the menu.

REQUEST PAYMENT



A screenshot of a web form titled 'REQUEST PAYMENT'. It contains three input fields: 'Company', 'E-mail', and 'Currency'. The 'Currency' field is set to 'USD'. To the right of the form is a 'Payments by' section with a 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.

Agent Selected: AGENT				DON'T ALLOW TO ENTER IN: <input type="checkbox"/> C <input type="checkbox"/> S	
FIELDS	-----NOT-----				
	EMPTY	MODIFY	MODIFY (unless empty)		
First Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Last Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Company Name	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Address	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
City	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
State	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Zip Code	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Country	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone 1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Phone 2	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
				Contacts	Enter <input type="checkbox"/>
				Contacts	Add <input type="checkbox"/>
				Contacts	Modify <input type="checkbox"/>
				Contact-Email	Delete <input checked="" type="checkbox"/>
				Agenda	<input type="checkbox"/>
				Advertising Center	<input type="checkbox"/>
				Agent Metrics	<input type="checkbox"/>
				CC Analyzer	<input type="checkbox"/>
				Checks	<input checked="" type="checkbox"/>
				Credit Repair	<input checked="" type="checkbox"/>
				Data Analysis	<input type="checkbox"/>
				Debt Settlement	<input checked="" type="checkbox"/>
				Domains Manager	<input checked="" type="checkbox"/>

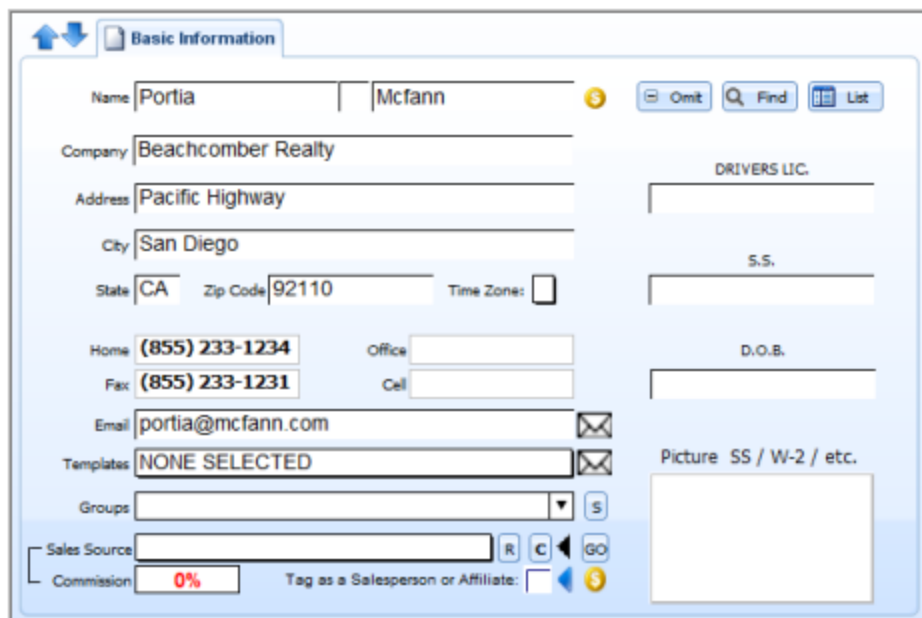
CLIENTS AND PROSPECTS

ADDING A NEW CLIENT

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



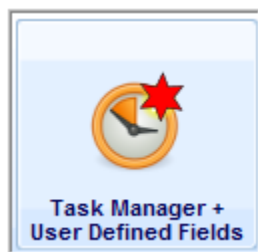
Enter the basic information for this client such as its name, address, phone number, etc.



The screenshot shows a web-based form titled "Basic Information" for a client named Portia Mcfann. The form is organized into several sections:

- Name:** Portia Mcfann
- Company:** Beachcomber Realty
- Address:** Pacific Highway
- City:** San Diego
- State:** CA, **Zip Code:** 92110, **Time Zone:** [dropdown]
- Home:** (855) 233-1234, **Office:** [text box]
- Fax:** (855) 233-1231, **Cell:** [text box]
- Email:** portia@mcfann.com
- Templates:** NONE SELECTED
- Groups:** [dropdown menu]
- Sales Source:** [text box]
- Commission:** 0%
- Tag as a Salesperson or Affiliate:** [checkbox]
- DRIVERS LIC.:** [text box]
- S.S.:** [text box]
- D.O.B.:** [text box]
- Picture SS / W-2 / etc.:** [text box]

To enter his Social Security and Date of Birth (D.O.B.), click the Task Manager + User Defined Fields button from the main 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 number 10 and 14.

TEXT Undo **User Defined Fields**

UDF 01	<input type="text"/>				
UDF 02	<input type="text"/>				
UDF 03	<input type="text"/>				
UDF 04	<input type="text"/>				
UDF 05	<input type="text"/>				
UDF 06	<input type="text"/>				
UDF 07	<input type="text"/>				
UDF 08	<input type="text"/>				
Drivers License	<input type="text"/>				
Social Security	<input type="text"/>				

NUMBER (Click To get Totals & Averages for Selected Records)

UDF 11	+	<input type="text"/>			T=	<input type="text" value="0"/>	A=	<input type="text" value="0.0"/>
UDF 12	+	<input type="text"/>			T=	<input type="text" value="0"/>	A=	<input type="text" value="0.0"/>
UDF 13	+	<input type="text"/>			T=	<input type="text" value="0"/>	A=	<input type="text" value="0.0"/>
Total =		<input type="text"/>						

DATE

Date of Birth. Age:

UDF 15

Twitter ID:

Picture

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 or 2 digits for the year).

Notice that when you enter the D.O.B. you can see the useful for small talk. The AGE is automatically entered in the Age field once you enter a date on the D.O.B. field.

FINDING CLIENTS (QUICK FIND)

To find clients from the whole database or selected database of clients, click on the Find button.



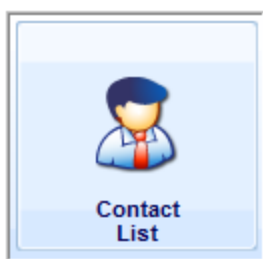
A windows dialog will then pop up where you can enter the query of information on the client/s you want to find.

A light gray dialog box with a title bar. The title text reads: "Quick Find and From Selected searches in First Name, Last Name, Company, Phone Numbers, Keywords, Product Codes, URL, Referrals, Related to, State and". Below the title is a dropdown menu labeled "Previous Search" and a text input field labeled "or Type New Search". At the bottom, there are four buttons: "Cancel", "Full Find", "Quick Find from Selected", and "Quick Find".

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.

The search result will then be displayed in the main screen selecting the contacts based on the result. To display them in a list, click the Contact List button.



Now once the Contact List button is clicked, you will be directed to the Contacts Selected – Found List screen with the search results.

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.andrewfenste	andrew@fenstermacher.co	1	Omit	🗑️
Gracie	Riskalla	Jessup, Richard A Esq	CA		(916) 344-7735	http://www.gracieriskalla	gracie@riskalla.com	1	Omit	🗑️
Shirley	Keams	Transport Workers Un Afl Cio	MA		(508) 228-6114	http://www.shirleykeams	shirley@keams.com	1	Omit	🗑️
Willie	Coughenour	Adams Rib Rstrnt At Norwalk	WV		(304) 422-8589	http://www.williecoughen	willie@coughenour.com	1	Omit	🗑️
Antionette	Shoobridge	Dolfin International	FL		(305) 624-9608	http://www.antionettesh	antionette@shoobridge.co	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.laurenlangen	lauren@langenbach.com	1	Omit	🗑️
Julia	Cokins	Ati Title Company	GA		(404) 266-1124	http://www.juliacokins.co	julia@cokins.com	1	Omit	🗑️
Ashley	Kilness	Criterium Day Engineers	TX		(972) 416-8588	http://www.ashleykilness	ashley@kilness.com	1	Omit	🗑️
Jules	Kellerhouse	Apt Guid Orng Cnty Long Bch	OH		(937) 294-6534	http://www.juleskellerho	jules@kellerhouse.com	1	Omit	🗑️
Marilyn	Kleine	Alitalia Airlines	NE		(402) 341-8233	http://www.marilynkleine	marilyn@kleine.com	1	Omit	🗑️
Jeromy	Dirksen	Automatic Mach Products Co	CA		(562) 868-3418	http://www.jeromydirkse	jeromy@dirksen.com	1	Omit	🗑️
Abdul	Begum	Hisrich, Thomas H Esq	NY		(718) 522-7615	http://www.abdulbegum.	abdul@begum.com	1	Omit	🗑️
Jamey	Cellar	World Const & Parliament Assn	FL		(850) 434-4388	http://www.jameycellar.c	jamey@cellar.com	1	Omit	🗑️
Alfonso	Canerday	Cirrus Logic Colorado	NJ		(732) 937-8343	http://www.alfonsocaner	alfonso@canerday.com	1	Omit	🗑️
Brooke	Mondelli	Sands Beach Club All Ste Resrt	PA		(717) 741-3987	http://www.brookemond	brooke@mondelli.com	1	Omit	🗑️
Angelica	Berkenbile	B D Holt Co	MD		(410) 252-6645	http://www.angelicaberk	angelica@berkenbile.com	1	Omit	🗑️
Ashley	Coneway	Pearle Vision Express	PA		(610) 354-6047	http://www.ashleyconew	ashley@coneway.com	1	Omit	🗑️
Van	Sprewell	Asia Pacific Technotrade	TX		(915) 593-7646	http://www.vansprewell.c	van@sprewell.com	1	Omit	🗑️
Quinn	Prazak	Am Internl	CA		(916) 363-9562	http://www.quinnprazak.	quinn@prazak.com	1	Omit	🗑️
Antionette	Andree	Syrinq Wayne Ins Aqcy Inc	HI		(808) 488-7186	http://www.antionettean	antionette@andree.com	1	Omit	🗑️
Alfred	Fines	Saurer Txtl Systems Charlotte	MT		(406) 232-7958	http://www.alfredfines.co	alfred@fines.com	1	Omit	🗑️
Nicholas	Engelson	Apollo Glass Co	CO		(303) 499-1368	http://www.nicholasengel	nicholas@engelson.com	1	Omit	🗑️
Alecia	Krance	Lenweaver, Thomas E Esq	PA		(215) 735-0485	http://www.aleciakrance.	alecia@krance.com	1	Omit	🗑️
Ivan	Cimaglia	Surveying And Mapping Inc	CA		(510) 429-4828	http://www.ivancimaglia.	ivan@cimaglia.com	1	Omit	🗑️

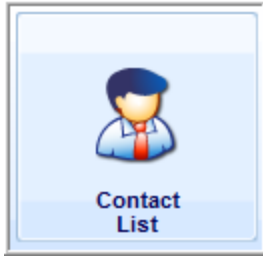
DELETING CONTACTS

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 CONTACT LIST button



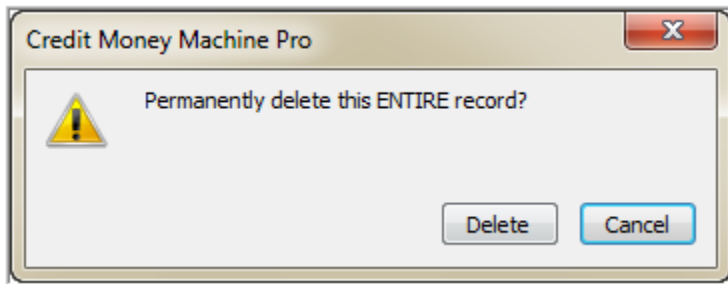
Or the LIST button in the Contact Information section



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	<input type="checkbox"/>	<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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shirley	Keams	Transport Workers Un Afi Cio	<input type="checkbox"/>	MA	(508) 228-6114	http://www.shirleykeams.	shirley@keams.com	1	<input type="checkbox"/>	<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	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Antionette	Shoobridge	Dolfin International	<input type="checkbox"/>	FL	(305) 624-9608	http://www.antionettesh	antionette@shoobridge.co	1	<input type="checkbox"/>	<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	<input type="checkbox"/>	<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.

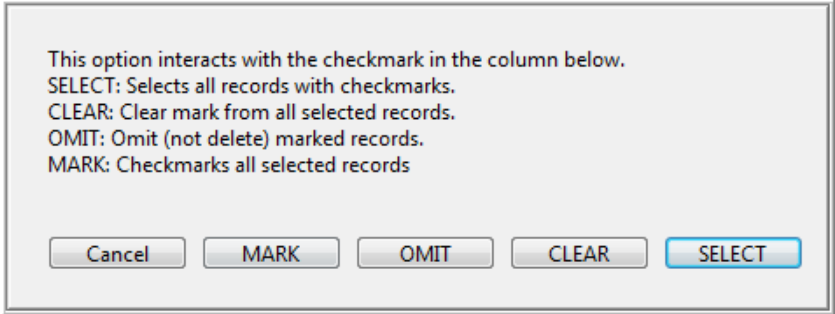


In the case where you don't want this to pop up every time you delete a contact, just click the GARBAGE BIN icon on top of all the same icons on the column.

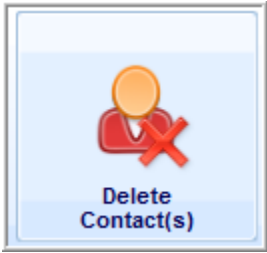


To delete contacts from the list **BY GROUP**, mark the checkbox of the contacts that you want to delete at the same time.

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



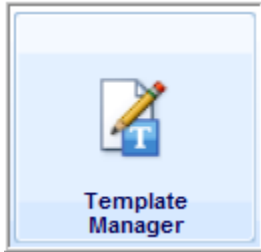
Once, the group of contacts to be deleted are marked, click the DELETE CONTACTS button.



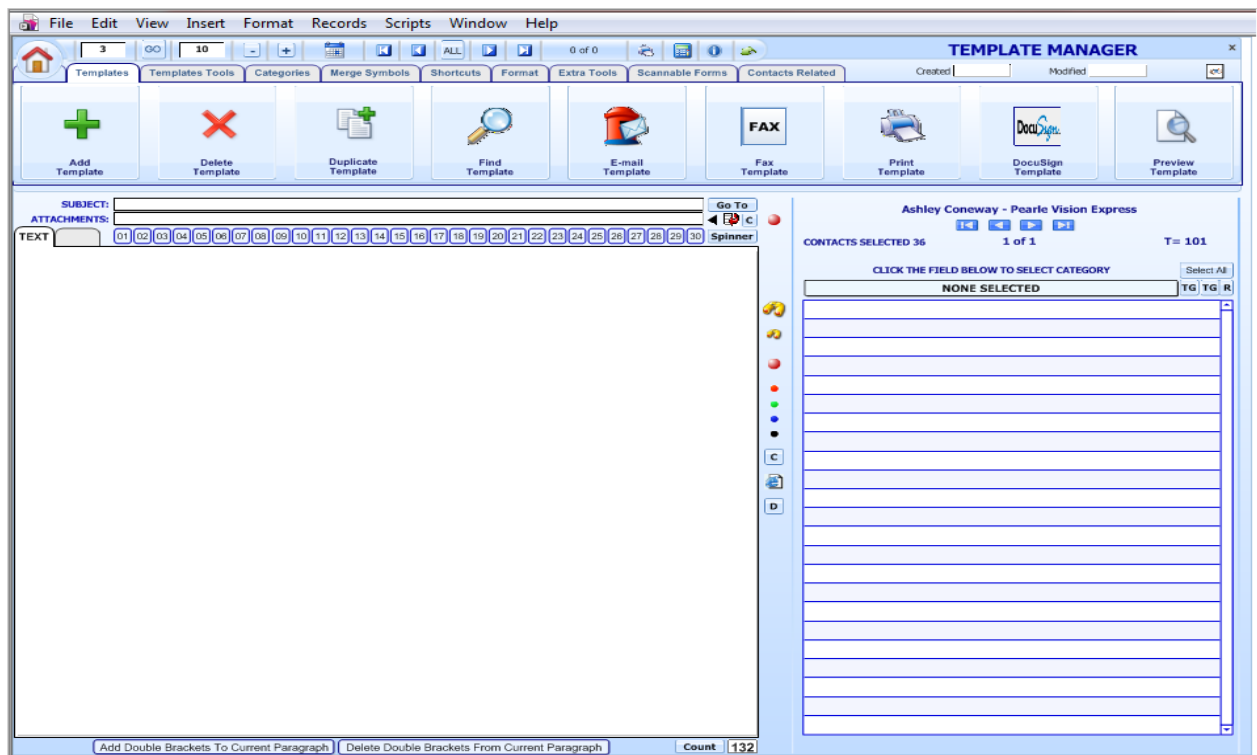
TEMPLATES FOR DISPUTES

SELECTING TEMPLATES

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

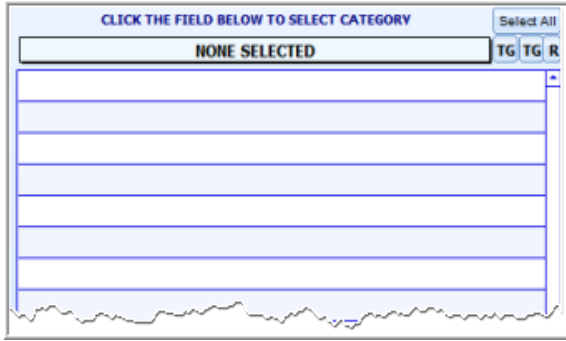


Now you should be in the Template Manager screen.



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

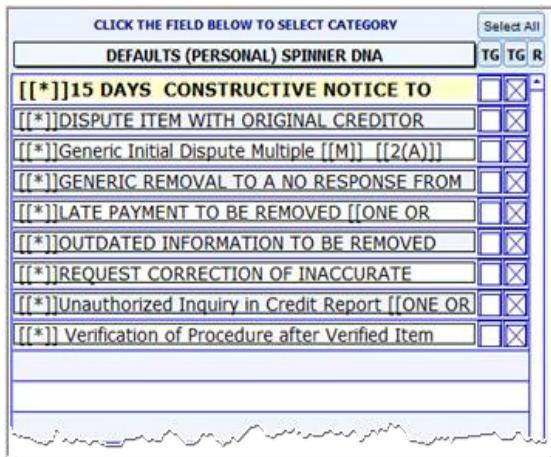
To do this, click on the template Category field and select from the available categories.



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.

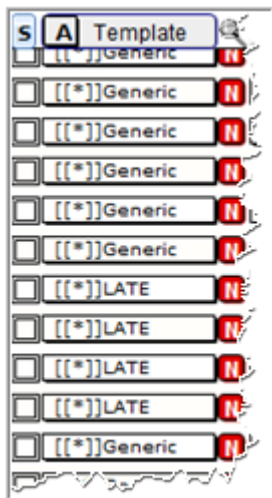


Below are the default templates under the category DEFAULTS (PERSONAL) SPINNER DNA. Mark **the second checkbox** of the template under the selected category to be used in your dispute entries. Or you can just click on the second TG button to mark all the templates under the selected category.



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.

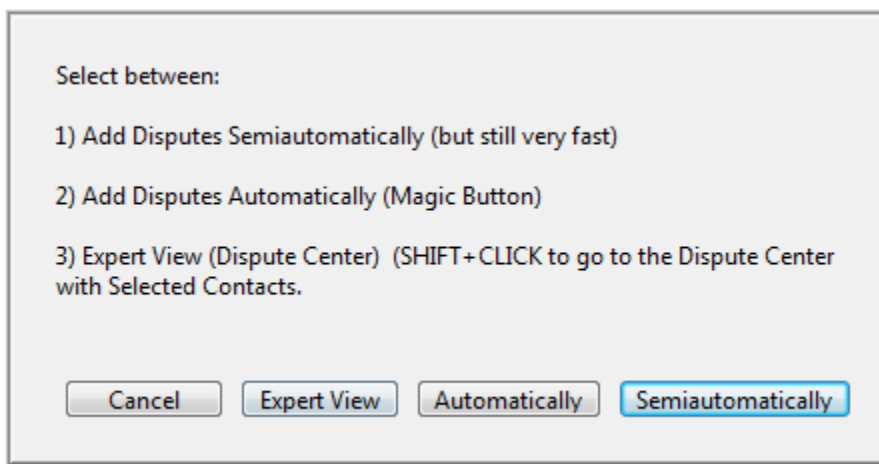


CREDIT REPAIR

THE DISPUTE CENTER

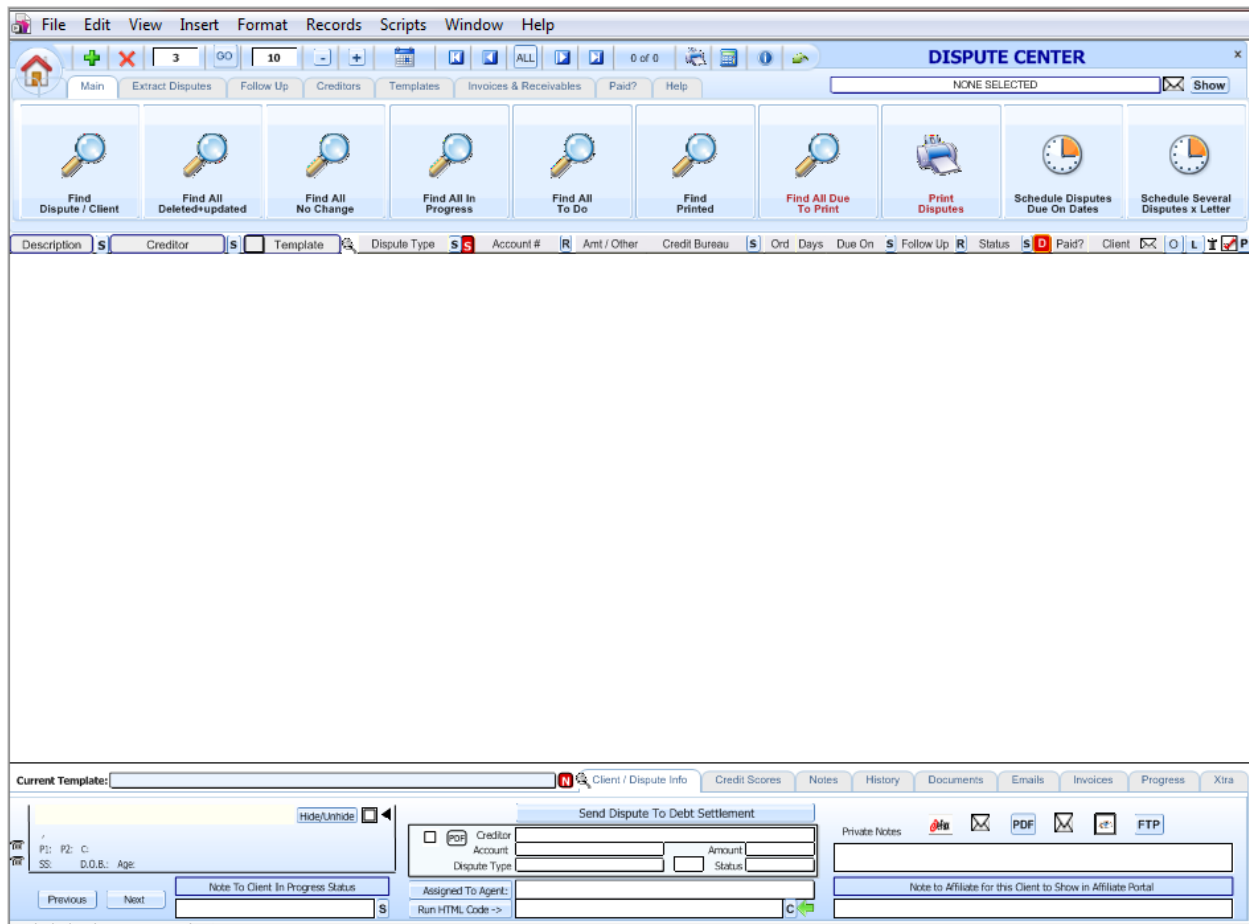
Once the basic data is entered you can proceed to the Dispute Center. You can do this in two ways.

- 1) By clicking the Credit Repair button (from the main screen) and then the EXPERT VIEW button.



- 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.

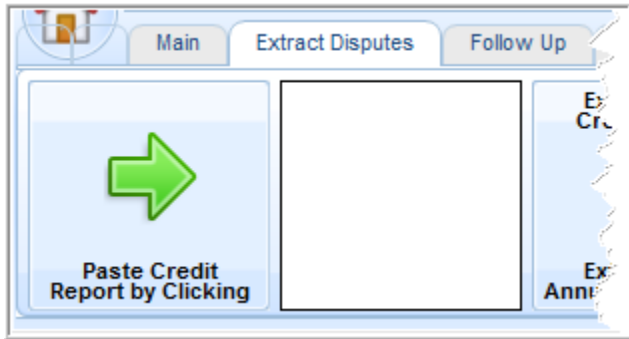


Now is time to download the Credit Report for your client. While it is possible to extract from credit reports of different credit report providers we recommend you to advise your client to use www.creditkeeper.com because it is easy to use and cheaper and it works flawlessly.

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.

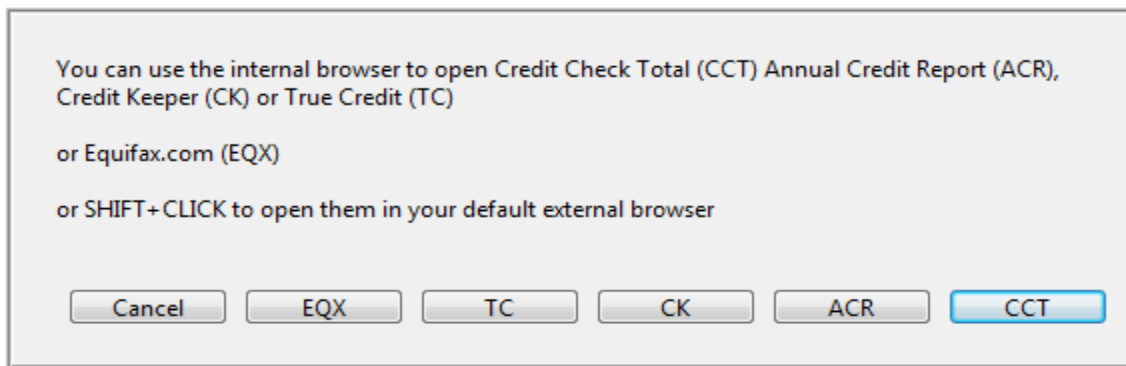


You can enter your client's Username, Password and Security Word in the right side of the screen



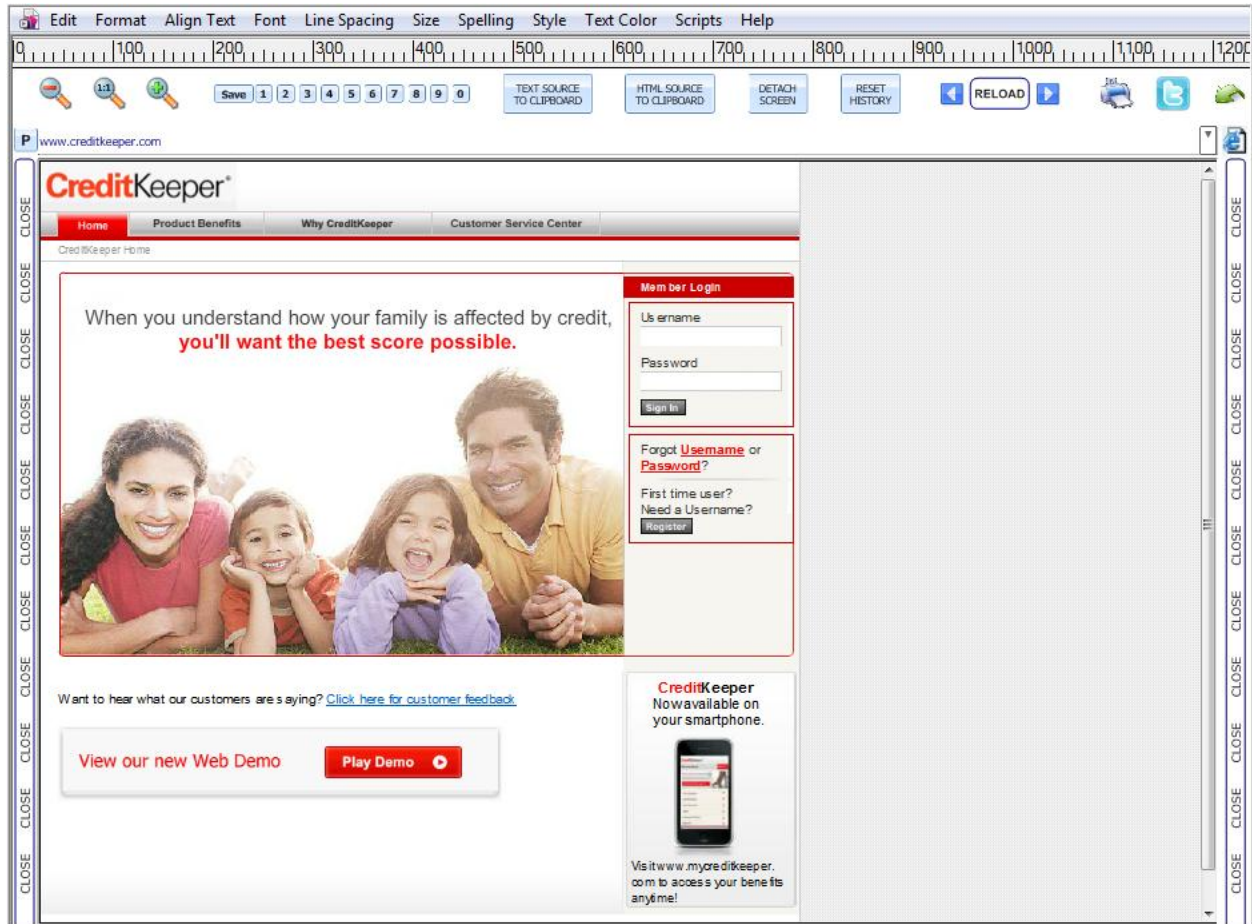
Notice that an empty line (row) is created automatically and once all disputes are extracted ***most will be deleted.***

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 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.



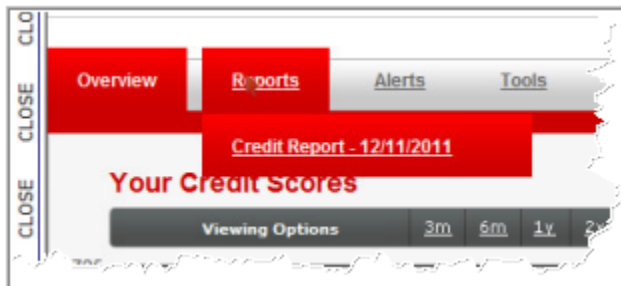
Once you enter into your Credit Keeper account, you can then access your credit information by clicking on the My Credit tab.



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.

The screenshot shows the CreditKeeper website's security verification page. At the top, the 'CreditKeeper' logo is on the left, and a 'Log Out' button is on the right. Below the logo is a navigation menu with links for 'Home', 'My Benefits', 'My Credit' (which is highlighted in red), 'Why CreditKeeper', 'Learning Center', 'Customer Service Center', and 'My Account'. Underneath the navigation menu, there is a breadcrumb trail: 'CreditKeeper Home | Credit Center'. The main content area has a red header with the text 'Security Word'. Below this, a message reads: 'To access your credit information, please answer the following:'. There are three dropdown menus for selecting characters from the security word: 'Select character 2 from your Security Word:', 'Select character 4 from your Security Word:', and 'Select character 5 from your Security Word:'. Each dropdown menu currently shows the letter 'A'. Below these is a 'Sample Word:' section with a box containing the word 'Identity'. A paragraph of text explains: '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.' A link is provided: 'Forgotten your Security Word? [Click here to have it reset.](#)'. At the bottom of the form is a red 'Submit' button. The footer contains links for 'Home | FAQs | Contact Us | Privacy/Security | Terms & Conditions | Site Map' and copyright information: '©COPYRIGHT HSBC Card Services Inc. 2011 All Rights Reserved'.

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.

The screenshot shows the CreditKeeper credit report interface. At the top, there is a 'Close Window' link. Below the header, there are navigation links for 'Print this page' and 'View Full Report'. The report is prepared for 'kathryn duke' on '12/11/2011 (GMT)'. The main content area is divided into sections: 'Personal Profile', 'Credit Summary', 'Account History', 'Credit Inquiries', 'Public Records', and 'Credit Score'. The 'Personal Profile' section is highlighted in red and contains a message: '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.' Below this message is a table with three columns representing data from Experian, Equifax, and TransUnion. The table includes fields for Name, Also Known As, Year of Birth, Address(es), Current Employer, and Previous Employer(s). At the bottom of the table, there are links for 'Return to top', 'Print this page', and 'View Full Report'.

	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:			FIANACIAL SOLUTIONS
Previous Employer(s):			FINANCIAL SOLUTIONS

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

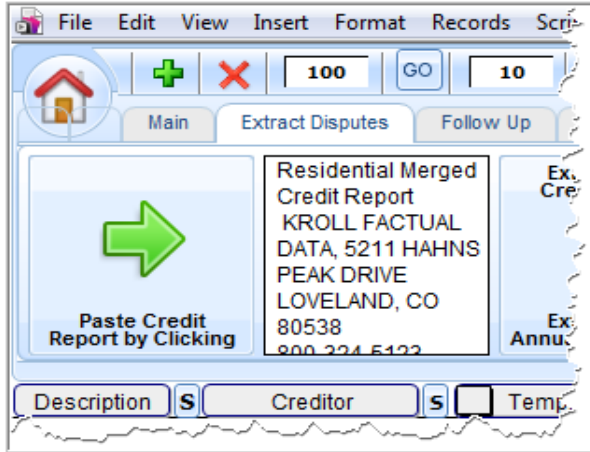
The page source will then pop up from which you will copy all the text into the Windows Clipboard.

The screenshot shows the CreditKeeper credit report interface with a Notepad window open over it. The Notepad window is titled 'CreditReport[1] - Notepad' and contains the following HTML source code:

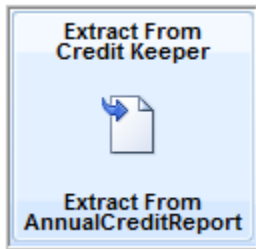
```
File Edit Format View Help
<!DOCTYPE html PUBLIC "-//
<html xmlns="http://www.w
<head>
<meta http-equiv="con
<title>Credit Report
<base href="https://w
<link type="text/css"
<link rel="stylesheet
<style type="text/css
td.Ftr
back;
```

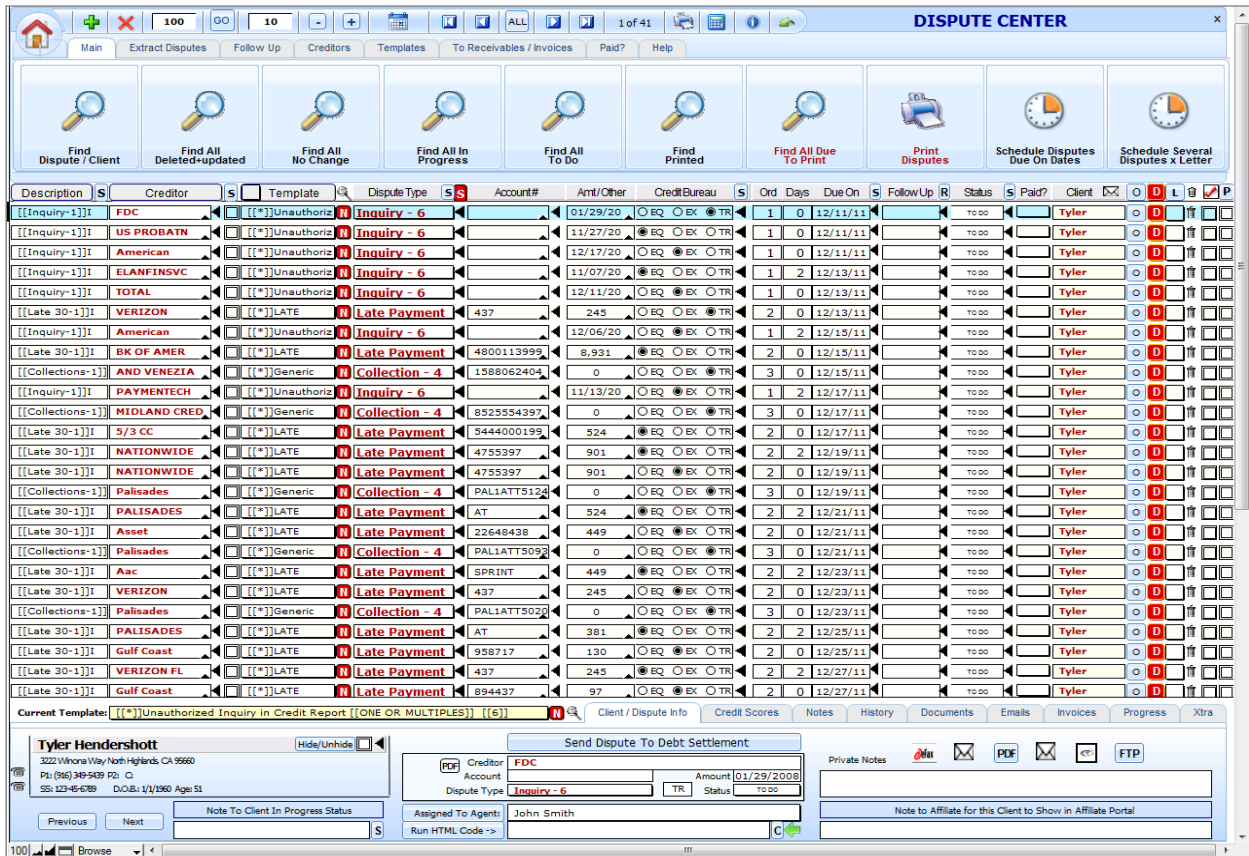
EXTRACTING THE DISPUTES

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.



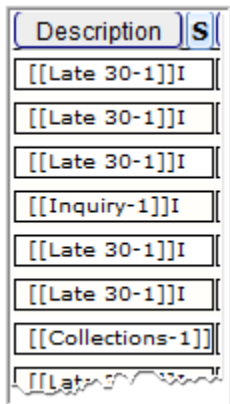
Then click the "Extract From Credit Keeper" button to extract all the items to dispute.



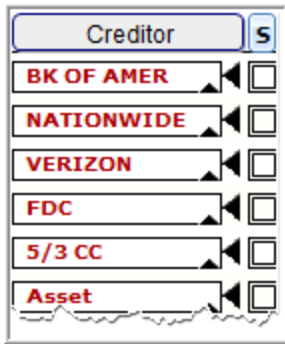


When you click the extract button only the derogatory are extracted:

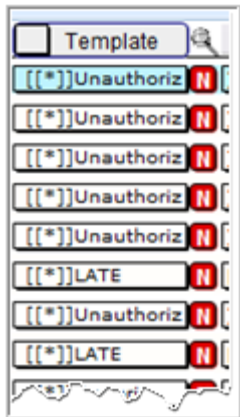
The Description / Reason for the dispute



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



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



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



Also, the accounts are extracted automatically.

Account#	R
4800113999	
4755397	
437	
5444000199	
22648438	
158806	4

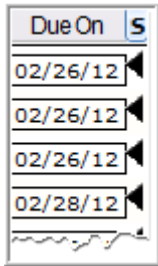
The amounts are extracted as appropriate as well as the dates for inquiries.

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.



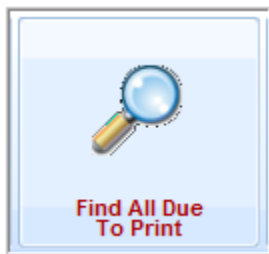
So in seconds we have set all the disputes for these clients.

SELECTING ALL DISPUTES TO PRINT FOR ALL CLIENTS

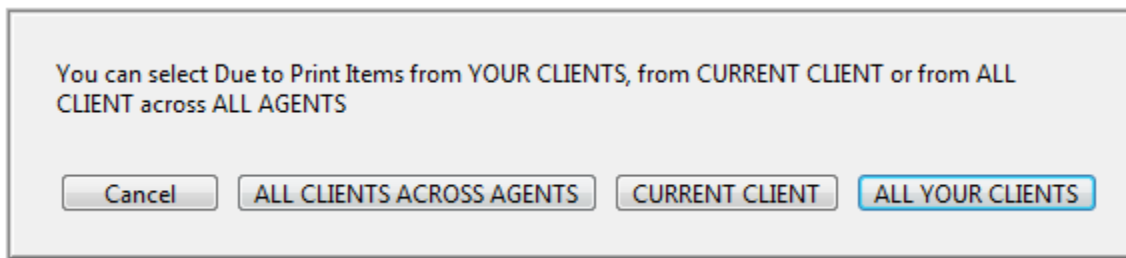
Usually we don't want to process client by client since it would take the whole day even with a small number of clients.

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

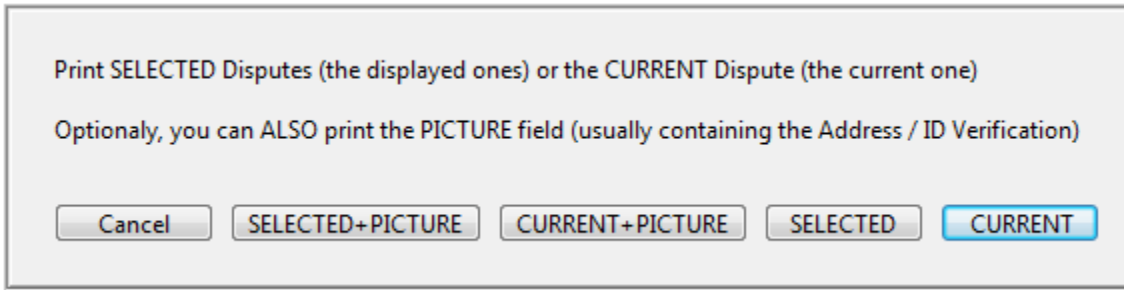
Just click the "Find All Due To Print" button



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.

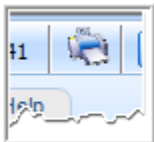


That's if you have process and printed the disputes for all your clients at once.

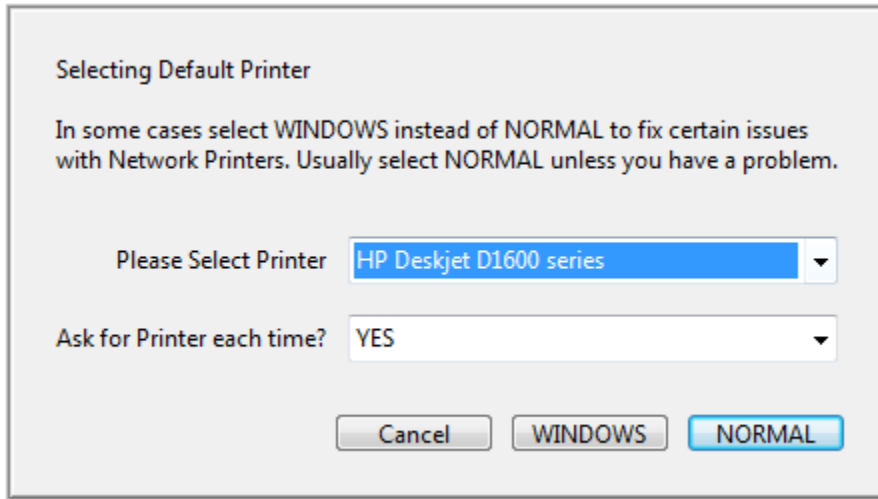
TROUBLESHOOTING PRINTERS

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.

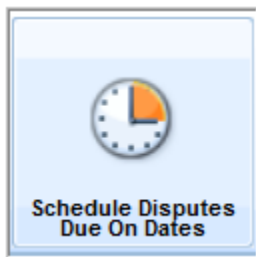


This will resolve all printing issues. You will need to repeat this every time that you upgrade to a new version.

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.

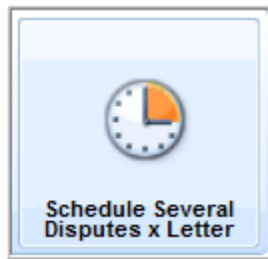
To change the number of days in between batches of letters just click the "Schedule Disputes Due on Dates" button and set a different number of days.



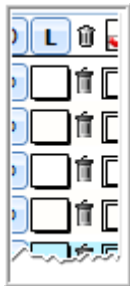
SETTING SEVERAL DISPUTES PER LETTER

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 windows dialog as shown in the figure below, just click on the "EXTRACT AND DISPLAY COMPARISON VIEW" button.

It looks like you are trying to download a Credit Report for a second time. This could be useful to know what disputes had been deleted. It is possible for the system to configure the display so only the ones IN PROGRESS will be considered and the status changed automatically to deleted if those disputes are not found.

Once imported the disputes in progress that have not been deleted will be together to their counterparts for easy comparison.

Once you have finished making your changes and creating new disputes as appropriate you should click at the top of the checkmarked column (rightmost column) to select all the ones imported and thus be able to delete them all at once.

Do you want to do that?

EXTRACT NORMALLY AND COMPARE EXTRACT AND DISPLAY COMPARISON VIEW Cancel

This will produce a view similar to the one below.

The screenshot shows the DISPUTE CENTER application window. At the top, there is a menu bar (File, Edit, View, Insert, Format, Records, Scripts, Window, Help) and a toolbar with various icons. Below the toolbar is a navigation pane with buttons for 'Main', 'Extract Disputes', 'Follow Up', 'Creditors', 'Templates', 'Invoices & Receivables', and 'Paid?'. The main area displays a table of disputes with columns for Description, Creditor, Template, Dispute Type, Account#, Amt/Other, Credit Bureau, Ord, Days, Due On, Follow Up, Status, Paid?, Client, and other icons. The table contains several rows of data, including inquiries and collections. Below the table, there is a 'Current Template' field and a detailed view for a specific dispute. The detailed view shows the client's name (Portia Mcfann), contact information, and a 'Send Dispute To Debt Settlement' section with fields for Creditor (Bank of America), Account (2002 SC 013190 SC), Amount (3962), and Dispute Type (Judgment - 7). There are also buttons for 'Previous', 'Next', and 'Run HTML Code'.

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.

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 area

Setup can be accessed by clicking the Setup icon at the upper 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.

FTP coordinates to upload the PROGRESS STATUS Pages

HOST IP:	<input type="text"/>	<input type="button" value="FTP TEST PAGE"/>
USER ID:	<input type="text"/>	<input type="button" value="FTP FILES"/>
PASSWORD:	<input type="text"/>	
DOMAIN+DIR:	<input type="text"/>	
INITIAL DIR.:	<input type="text"/>	<input type="button" value="WHOIS"/>
TEMPLATE.:	<input type="text" value="progress.php"/>	<input type="button" value="SPEED"/>

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.

The screenshot shows a web browser window with the URL www.teamusacreditrepair.net/progress/progress.php?id=p-28946697171-367917. The page content includes:

- Company name: **Team USA Credit Repair**, PO Box 1002, Birmingham, AL 35201. Contact info: Ph: (888) 487-0797, Fax: (205) 623-3269, info@teamusacreditrepair.com.
- Client name: **Jason Moore**.
- A 3D pie chart for **EQUIFAX** with a legend: To Do 95%, In Progress 0%, Updated 0%, Deleted 5%, Other 0%.
- Three columns of progress data for **Equifax**, **Experian**, and **TransUnion**.

Equifax	Experian	TransUnion
Initial Score:	Initial Score:	Initial Score:
Current Score:	Current Score:	Current Score:
Improvement: 0	Improvement: 0	Improvement: 0
Deleted: 1 6%	Deleted: 1 7%	Deleted: 0 0%
Updated: 0 0%	Updated: 0 0%	Updated: 0 0%
In Progress: 0 0%	In Progress: 0 0%	In Progress: 0 0%
To Do: 16 94%	To Do: 14 93%	To Do: 6 86%
Other: 0 0%	Other: 0 0%	Other: 1 14%
Total Items: 17	Total Items: 15	Total Items: 7

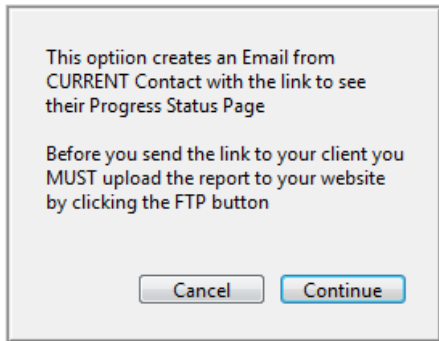
EMAIL CLIENT WITH THE DISPUTES IN THE PROGRESS STATUS

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.

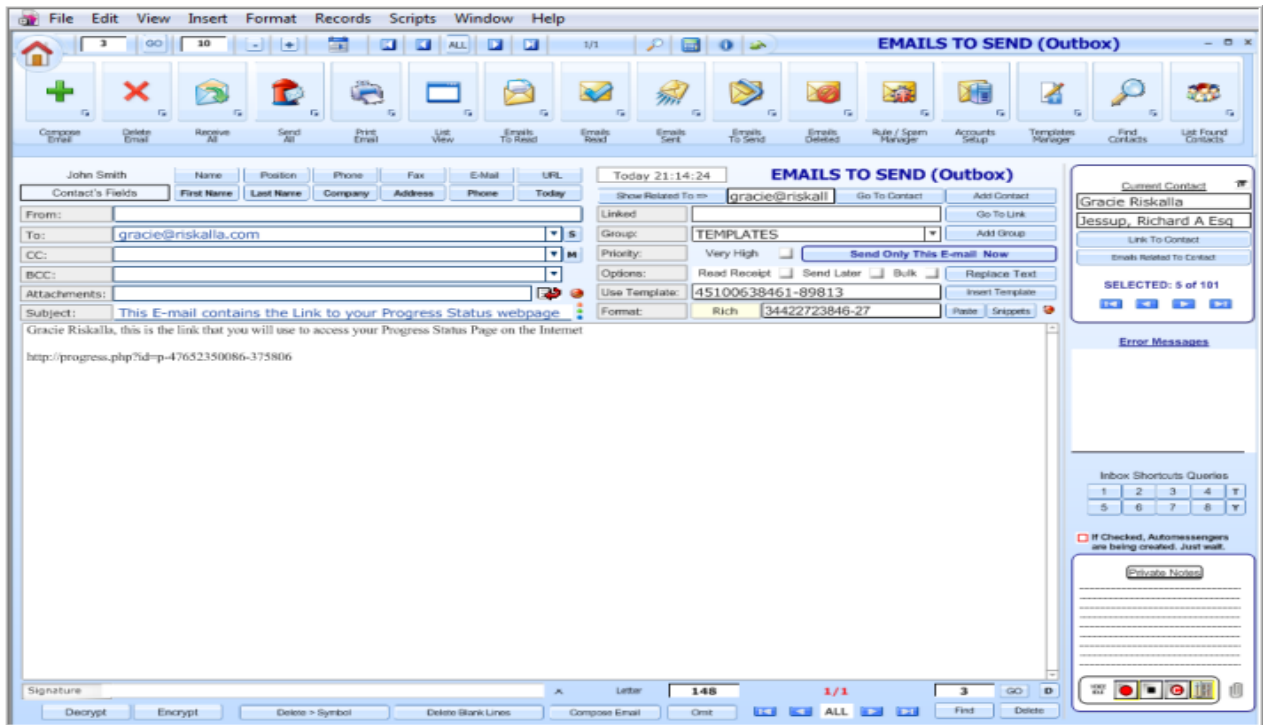
To email selected clients with the link, click the email icon beside the display icon



And click Continue

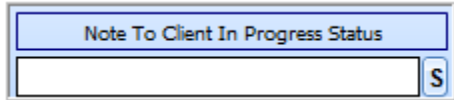


Automatically, you will be directed to the Email System of the software where the required fields are already provided such as the email to be sent and the email of the sender (which is the agent currently logged in) and the subject of the email together with the link of the Progress State you just have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



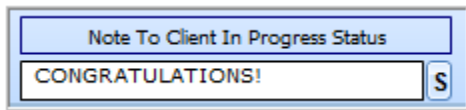
NOTE TO CLIENT IN PROGRESS STATUS

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.

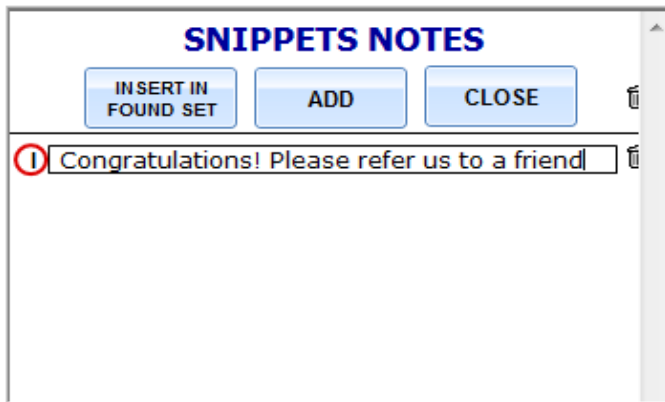


There are two ways on which you can add a note to the client.

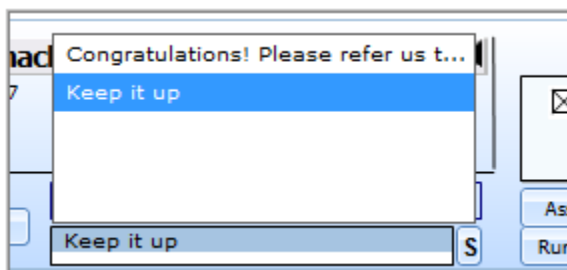
- 1) You can directly enter the note or text into the note field.



- 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.



HELP

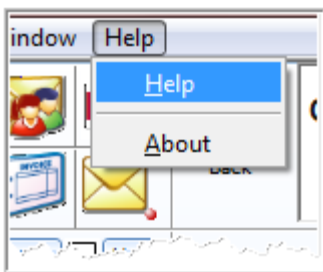
The software has a HELP program also known as the Hands – On Training System which contains all the basic things to know about the software.

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.).

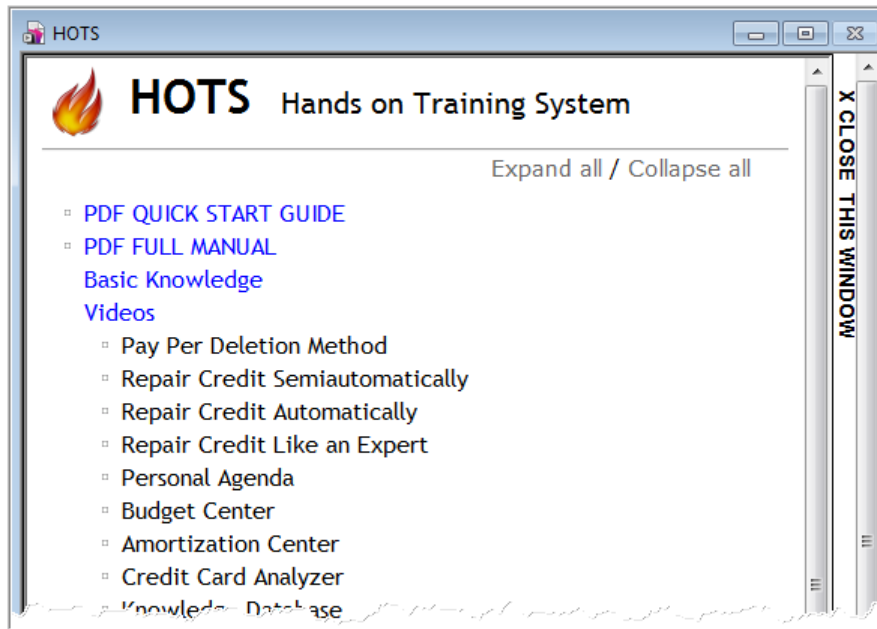


- 2) By clicking the HELP tab menu and selecting Help.



THE HANDS ON TRAINING SYSTEM (HOTS)

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.



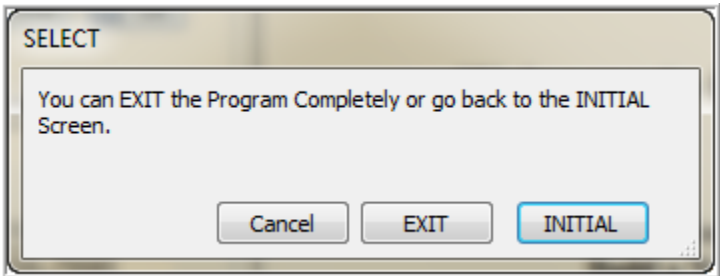
The blue color of the text on the list means that it can still be expanded. To expand, just click and select from the list under it. To expand all from the list at the same time, click the "Expand All". Otherwise, click the "Collapse All" to shrink them all back.

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.

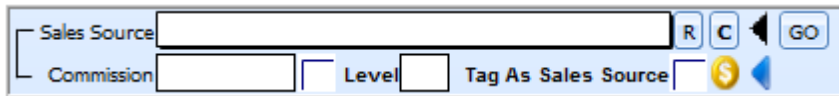


INTEGRATED COMMISSION SYSTEM

ASSIGNING COMMISSIONS TO YOUR SALES PEOPLE AND AFFILIATES

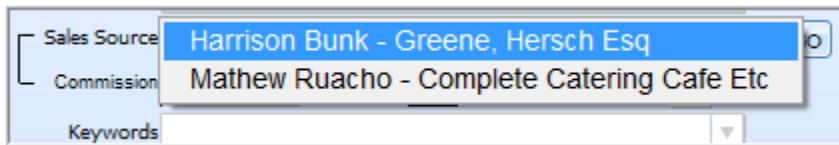
In assigning commissions to your sales people and affiliates, you need to tag them as a sales person.

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)



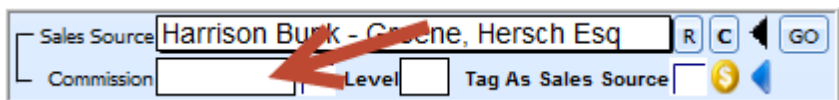
A screenshot of a software interface for assigning commissions. It features a form with the following fields: 'Sales Source' (a text input field), 'Commission' (a text input field), 'Level' (a text input field), and 'Tag As Sales Source' (a checkbox). To the right of the 'Sales Source' field are buttons labeled 'R', 'C', and 'GO'. Below the 'Tag As Sales Source' checkbox is a yellow dollar sign icon and a blue arrow icon.

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



A screenshot of a dropdown menu for 'Sales Source'. The menu is open, showing two options: 'Harrison Bunk - Greene, Hersch Esq' (highlighted in blue) and 'Mathew Ruacho - Complete Catering Cafe Etc'. Below the dropdown is a 'Keywords' field with a downward arrow.

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.

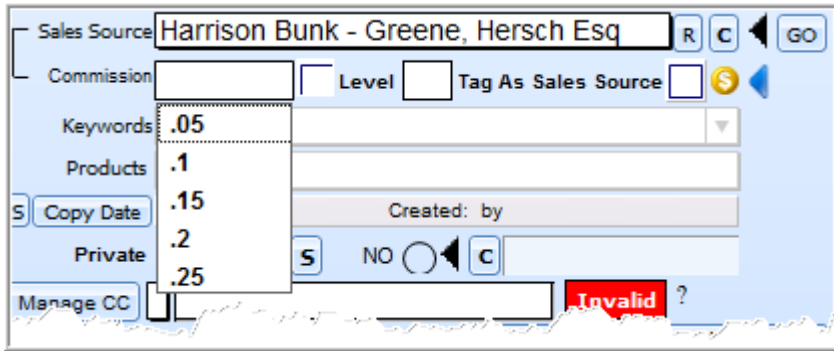


A screenshot of the same software interface as above, but with a red arrow pointing to the 'Commission' field. The 'Sales Source' field now contains the text 'Harrison Bunk - Greene, Hersch Esq'.

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.

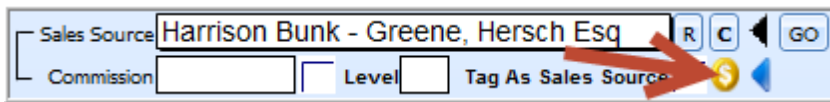
Or you can just click on the field and select from the predefined list of integers.



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.

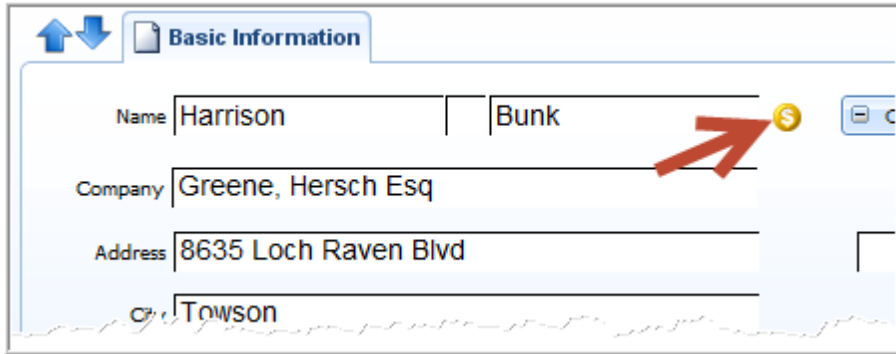


Then you will be directed to the Downline List screen.

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

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.

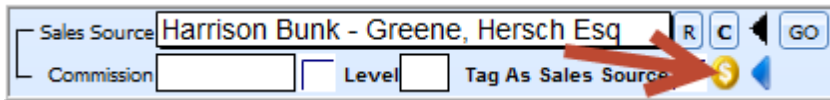


The screenshot shows a 'Basic Information' form with the following fields:

- Name: Harrison Bunk
- Company: Greene, Hersch Esq
- Address: 8635 Loch Raven Blvd
- City: Towson

A red arrow points to a yellow dollar sign button located to the right of the Name 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 a 'Sales Source' form with the following fields:

- Sales Source: Harrison Bunk - Greene, Hersch Esq
- Commission: []
- Level: []
- Tag As Sales Source: []

A red arrow points to a yellow dollar sign button located to the right of the Tag As Sales Source field.

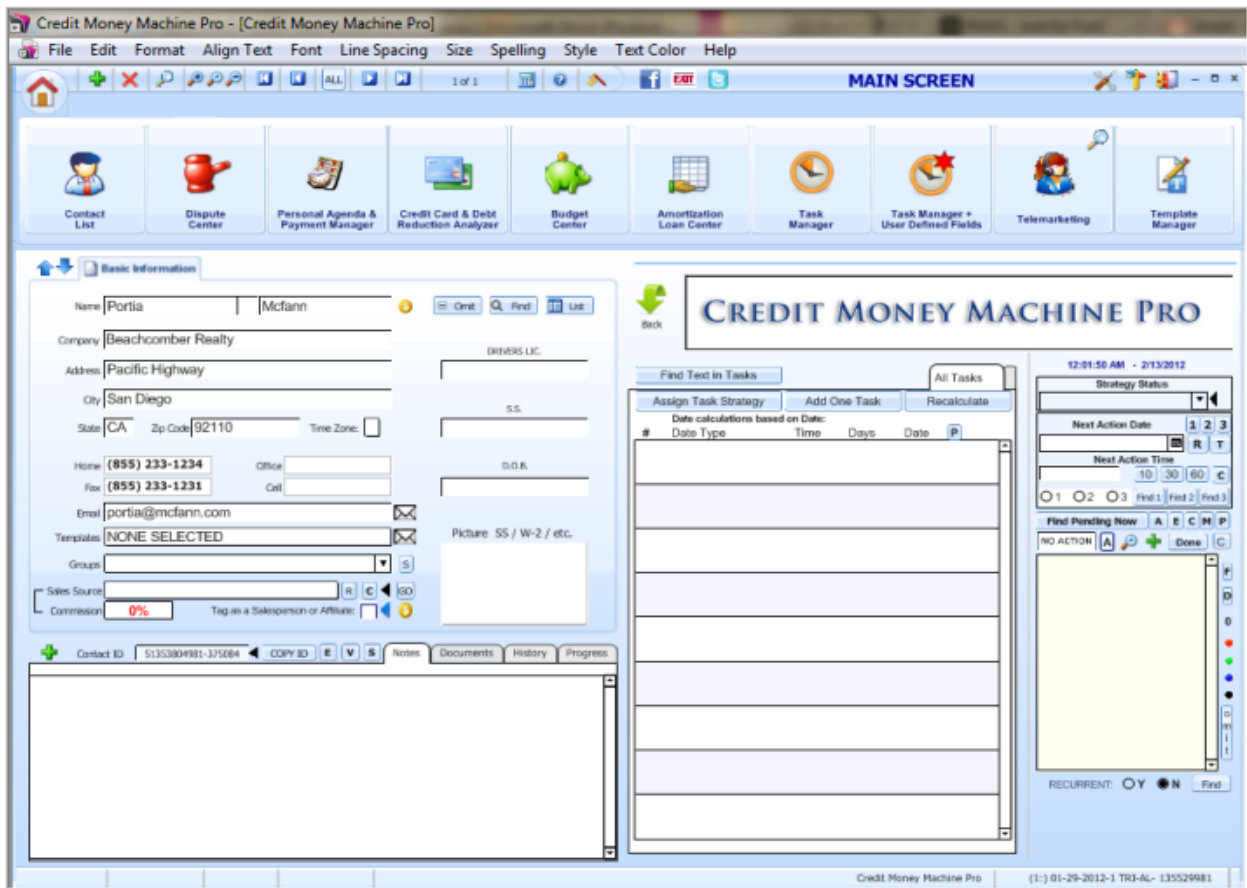
TASK MANAGER

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.



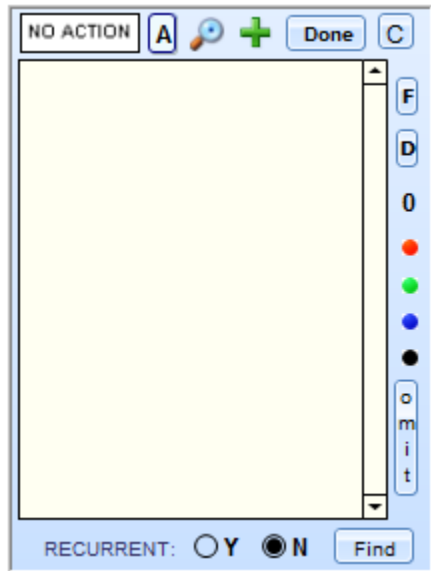
Note that the Task Manager is displayed ON the main screen once accessed without going inside the software.



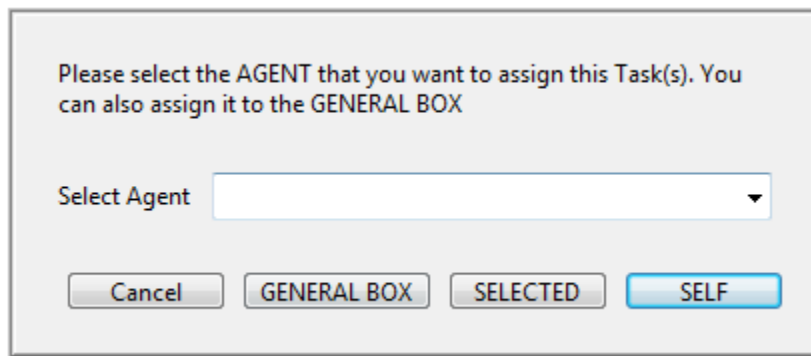
ADDING A TASK

USING THE GREEN PLUS BUTTON

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



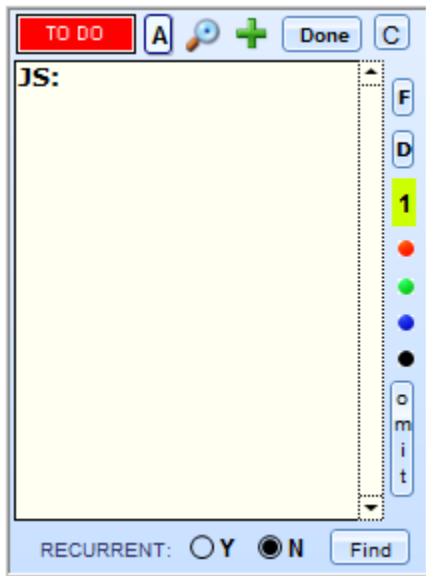
Then select the agent to assign the task.



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,



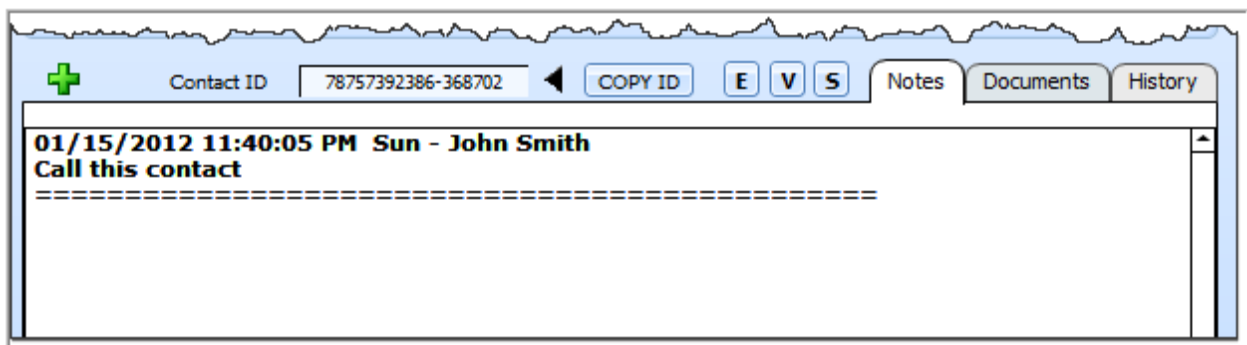
Then click on the task box to write the task with regards to the current contact.

USING THE F BUTTON

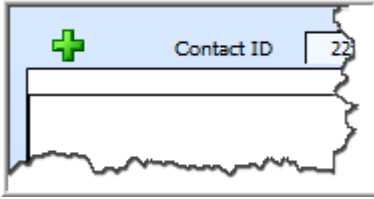
The F button stands for FOLLOW UP which is usually used when you have some descriptive notes for the task.

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)".

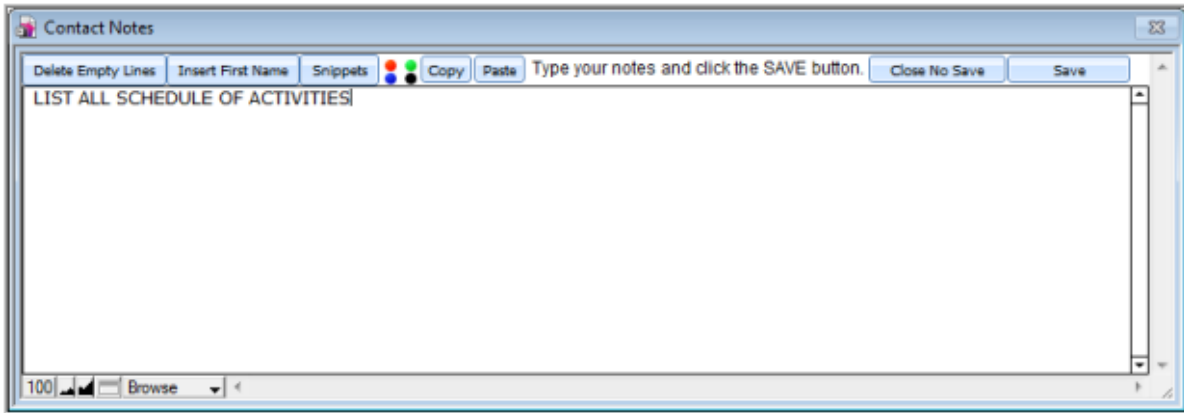
So instead of having to put the task in the task box, you can have it in the Notes area under the current contact's Contact Information Section.



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



Enter the note in the Notes field and click SAVE.



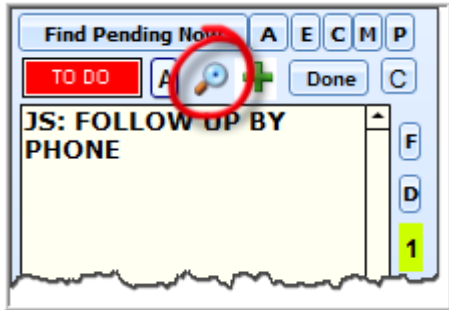
Note that this is a very different approach of creating a personal task just like in PERSONAL AGENDA in a way that using the software's TASK MANAGER, the tasks are created for you to do to the client linked to it.

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.

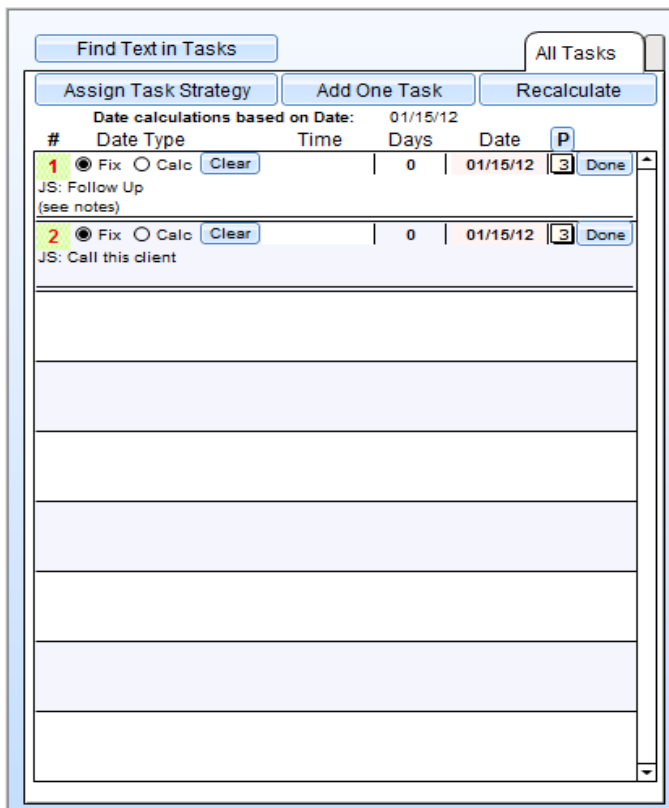
TASK SCHEDULER LIST

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.

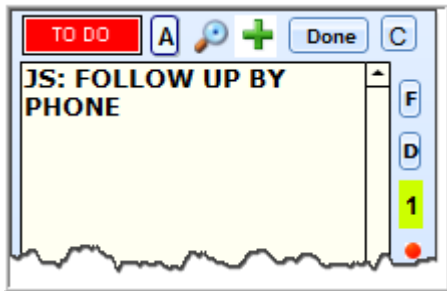


The Task Scheduler List is shown in the figure below.



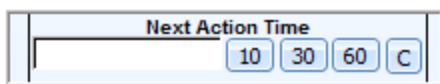
HOW TO RESCHEDULE TASK

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.

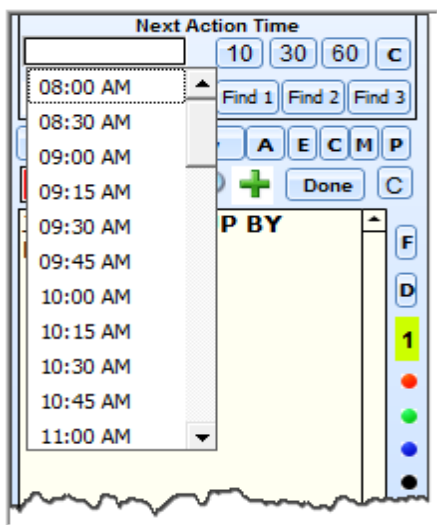


There are several ways to reschedule a task based on the TIME.

- 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.

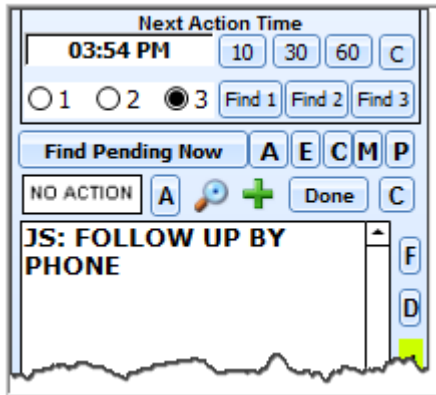


- 2) By clicking on the time field and selecting from the given default time list.

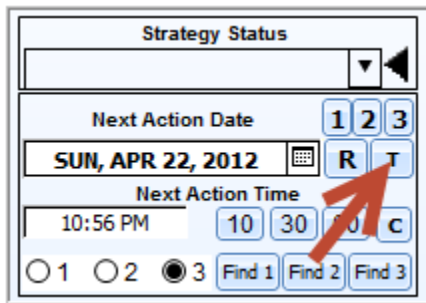


- 3) By manually entering the time based on the software time format HH:MM A.
- 4) By clicking on the buttons 10, 30, and 60 with SHIFT key combination. This will add 10, 30, or 60 minutes to the existing time in the time field.

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.

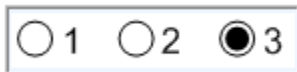
HOW TO SET PRIORITY TO TASKS

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

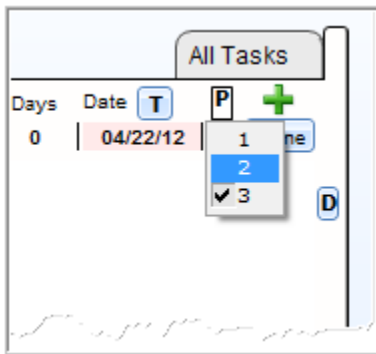
Note that the Task Manager has priorities 1 to 3: 1 having the highest priority and 3 having the lowest. When you create a task for a client, the task manager will set the priority of the task to 3 by default.

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 Setup area by clicking the Setup icon at the upper part of the main screen.

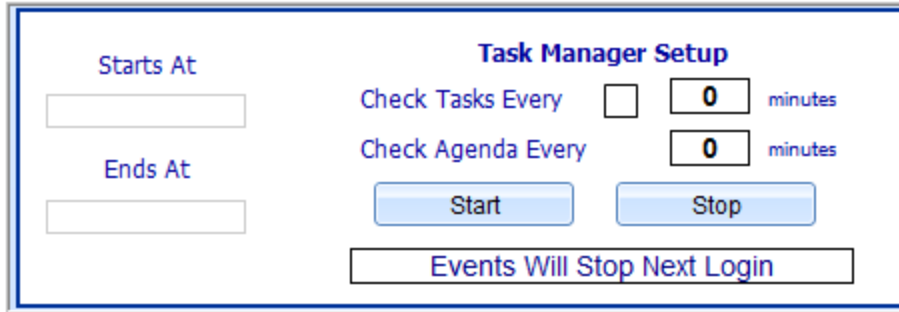


Now you should be in the Setup area.

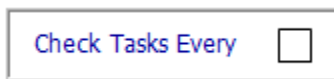
The screenshot shows the 'Credit Money Machine Pro' software interface. The window title is 'Credit Money Machine Pro - [Credit Money Machine Pro]'. The menu bar includes File, Edit, Format, Align Text, Font, Line Spacing, Size, Spelling, Style, Text Color, and Help. The toolbar contains icons for Add, Duplicate, Delete, Find, Print, Wizard On / Off, Calculator, and Back. The main area is divided into several sections:

- Agent Information:** A form for 'JOHN SMITH' with fields for Name, Company, Address, City, State, Zip Code, Phones, Fax, Email, Level Of Use (1), Password, Role (ADMINISTRATOR), URL, Referrals, Status (ACTIVE), IP Address (192.168.1.100), and Notes.
- Task Manager Setup:** Includes 'Starts At' and 'Ends At' fields, 'Check Tasks Every' and 'Check Agenda Every' (both set to 0 minutes), and 'Start' and 'Stop' buttons. A note says 'Events Will Stop Next Login'.
- FTP coordinates to upload the PROGRESS STATUS Pages:** Fields for HOST IP, USER ID, PASSWORD, DOMAIN+DIR, INITIAL DIR, and TEMPLATE (set to 'progress.php'). Buttons for 'FTP TEST PAGE' and 'FTP FILES' are present.
- Agent List:** A table with columns for Agent Name / Level/Status. The first entry is 'JOHN SMITH' with role 'Administrator' and status 'Active'.
- Company Section:** Includes 'Default Company' and 'Click Here To Select Default' link, along with 'ADD' and 'DUPLICATE' buttons.

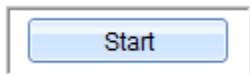
At the bottom left of the Setup area, there is a CHECK TASKS EVERY column with text field where you have to enter the number of minutes you want the software to check your tasks.



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.

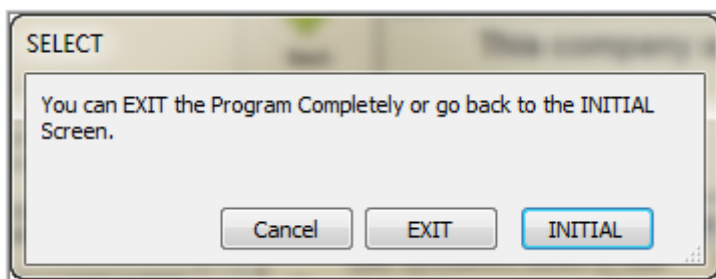


Now once the number of minutes is indicated for the software to check the task, click the Start button.

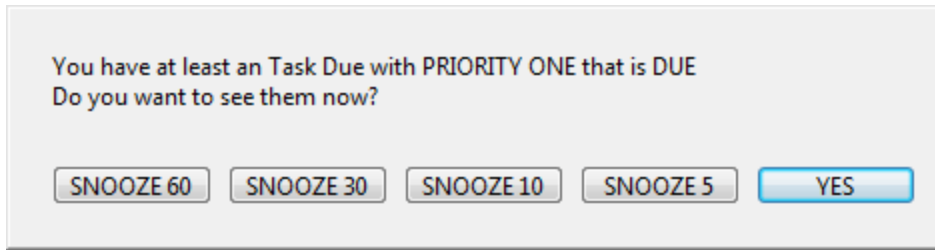


Note that the event will only start in the next login. Meaning, you have to logout from the software first and login again.

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



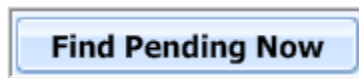
Once the software starts checking tasks on the designated minutes you have provided, every designated minutes the windows dialog as shown below will pop up for reminder.



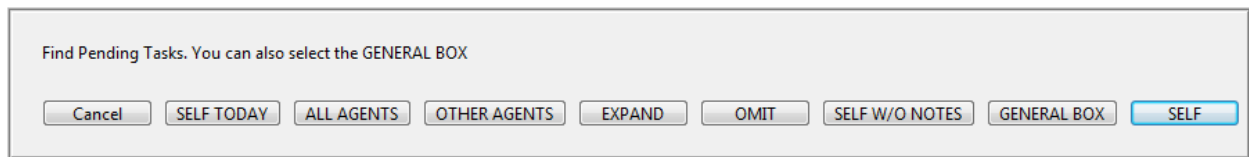
FIND PENDING TASKS

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.

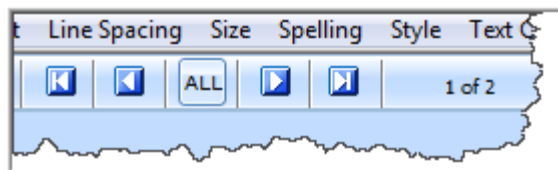
To do this, click the Find Pending Now button.



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 and navigate them using the navigation buttons.

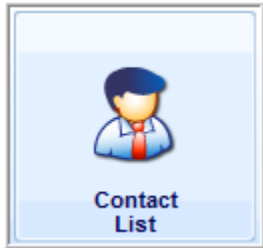


Note that the order of Finding Pending Tasks goes by the priority then the date and then the time. This means that if the tasks with the highest priority are first to be displayed.

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. To do this, click the Contact List button.



Once you are in the Contact List View screen or the Contacts Selected – Found List screen, click the Multiple List Views button. This will allow you to view the contacts with the pending tasks.



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	Omt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Clark	Strothmann	Dann Ocean Towing	NY	(516) 223-1706		clark@strothm	A: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/22/12	3	1	1	JOHN SMITH	Omt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Portia	Mcfann	Beachcomber Realty	CA	(858) 294-0682		portia@mcfan	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1	1	JOHN SMITH	Omt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Andrew	Fenstermacher	Shafer Commercial	FL	(850) 584-7434		andrew@fenst	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1	1	JOHN SMITH	Omt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brady	Tatum	Bohlin, Cywinski	OH	(419) 222-8541		brady@tatam.	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1	1	JOHN SMITH	Omt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gracie	Riskalla	Jessup, Richard A	CA	(916) 344-7735		gracie@riskall	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1	1	JOHN SMITH	Omt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helga	Rio	Pony Express	OK	(580) 357-0385		helga@rio.com	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1	1	JOHN SMITH	Omt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shirley	Keams	Transport Workers	MA	(508) 228-6114		shirley@keams	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1	1	JOHN SMITH	Omt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Willie	Coughenour	Adams Rib Rstrmt At	WV	(304) 422-8589		willie@coughe	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1	1	JOHN SMITH	Omt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Lashawn	Mariska	Goldstein, Phillip	KS	(785) 272-6823		lashawn@meri	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1	1	JOHN SMITH	Omt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Linda	Golda	Parham, J Randolph	MI	(616) 451-2797		linda@golda.c	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1	1	JOHN SMITH	Omt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Tyler	Hendershott	Rappaport Hertz	CA	(916) 349-5439		tyler@henders	JS: Follow Up	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	04/24/12	3	1	1	JOHN SMITH	Omt	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Delete Empty Lines

NOTES HISTORY DOCUMENTS EMAILS INVOICES PROGRESS

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

CONTACTS 3 LINE VIEW

Sort By: Next Action Date

Templates: NONE SELECTED

First Name	Last Name	Company	ST	Phone /Cellular	TZ	Next Task	A	D	Tasks	Next Task Date	P	T	Omit
Clark	Strothmann	Dann Ocean Towing Inc 16 Filmore Pl Freeport NY 11520		(516) 223-1706		A: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/22/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Portia	Mcfann	Beachcomber Realty 4891 Pacific Hwy San Diego CA 92110		(858) 294-0682		JS: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/24/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Andrew	Fenstermacher	Shafer Commercial Seating Inc 2400 N Jefferson St Perry FL 32347		(850) 584-7434		JS: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/24/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Brady	Tatum	Bohlin, Cywinski Jackson 710 N Cable Rd Lima OH 45805		(419) 222-8541		JS: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/24/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Gracie	Rekalla	Jessup, Richard A Esq 5345 Madison Ave Sacramento CA 95841		(916) 344-7735		JS: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/24/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Helga	Rio	Pony Express 5108 W Gore Blvd Lawton OK 73505		(580) 357-0385		JS: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/24/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Shirley	Keams	Transport Workers Uh All Clo 6 N Water St		(508) 228-6114		JS: Follow Up (see notes)	<input type="checkbox"/>	<input type="checkbox"/>	1	04/24/12	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

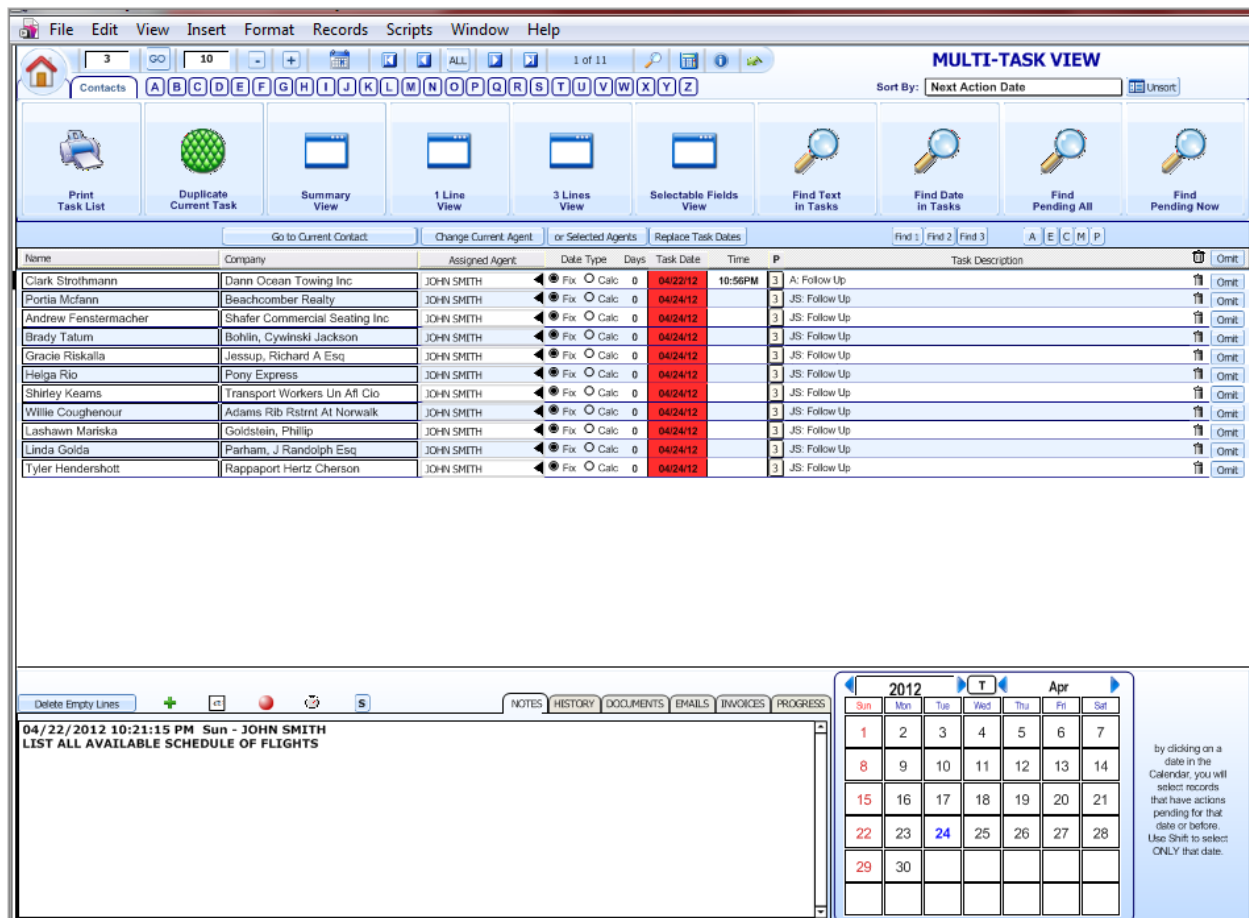
04/22/2012 10:21:15 PM Sun - JOHN SMITH
LIST ALL AVAILABLE SCHEDULE OF FLIGHTS

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



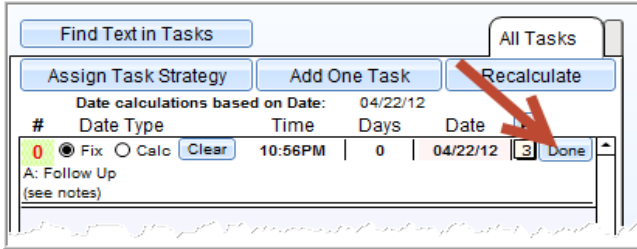
HOW TO DISPOSE TASKS

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.

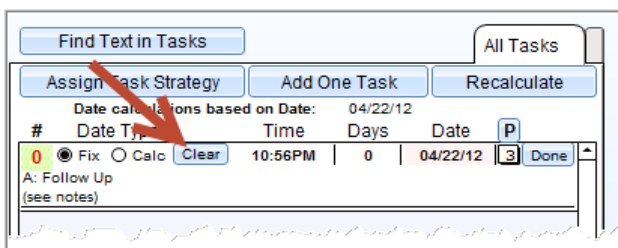
Specifically, the software has four ways to dispose the task.

- 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.

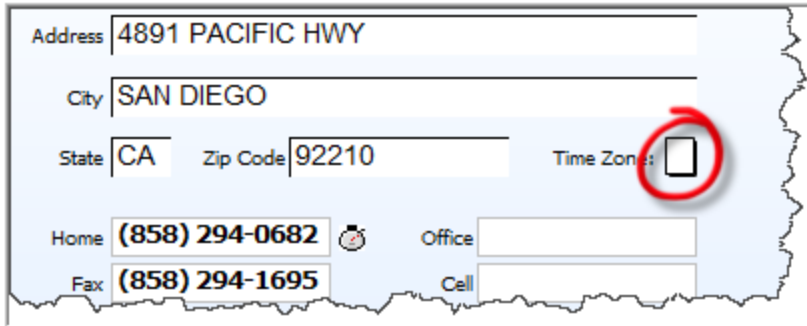
- 4) By rescheduling the task. This way, it is as if you have created a new task by just overwriting the content of the task with the old one.

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.



A screenshot of a contact information form. The fields are: Address (4891 PACIFIC HWY), City (SAN DIEGO), State (CA), Zip Code (92210), Time Zone (dropdown menu circled in red), Home ((858) 294-0682), Office (empty), Fax ((858) 294-1695), and Cell (empty).

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

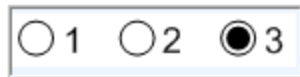


The A button, however is used to find and select all the due and future tasks.

- 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:

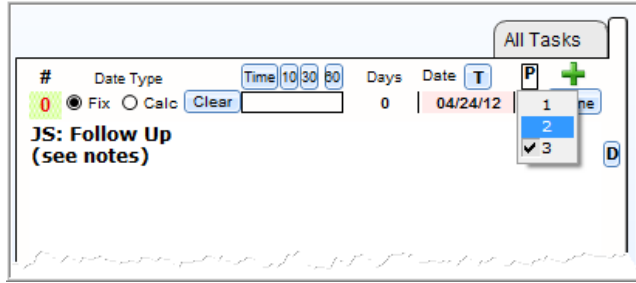
- a. By selecting from the radio buttons



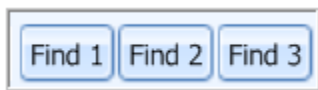
Three radio buttons labeled 1, 2, and 3. The button for 3 is selected.

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

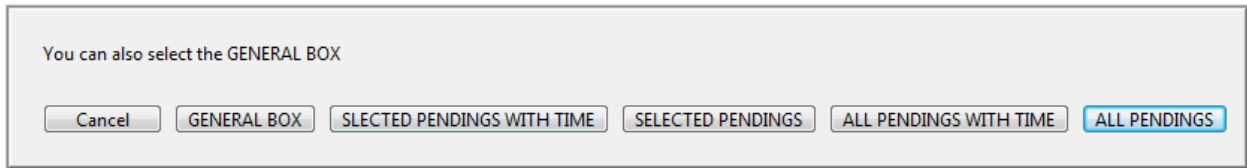
- b. By the drop down priority list in the Task Scheduler List



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

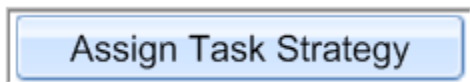


ASSIGNING STRATEGY TASKS

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



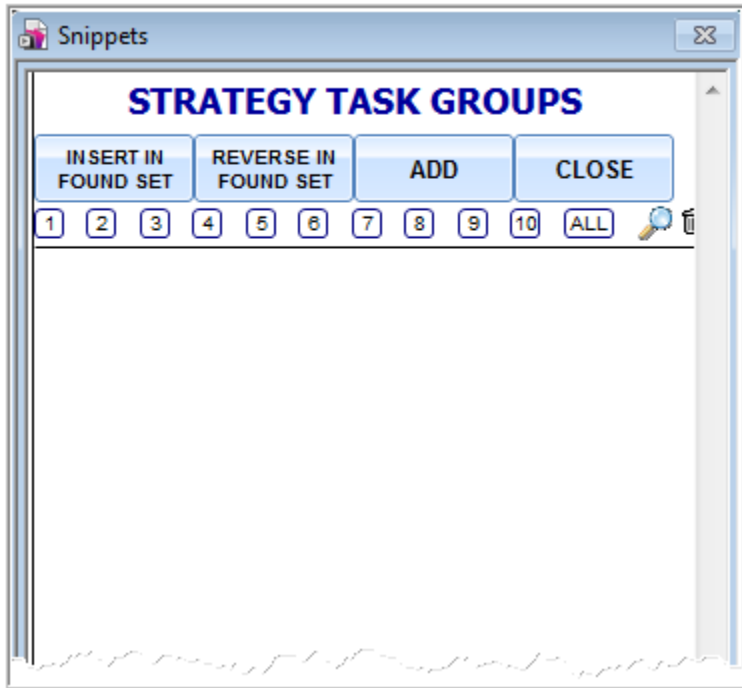
Or the Assign Task Strategy button in the Task Scheduler List



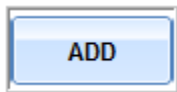
The tasks created using this are called STRATEGY TASKS. Strategy tasks are tasks that are grouped in order to utilize the time of adding tasks one by one. Usually tasks are grouped

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.

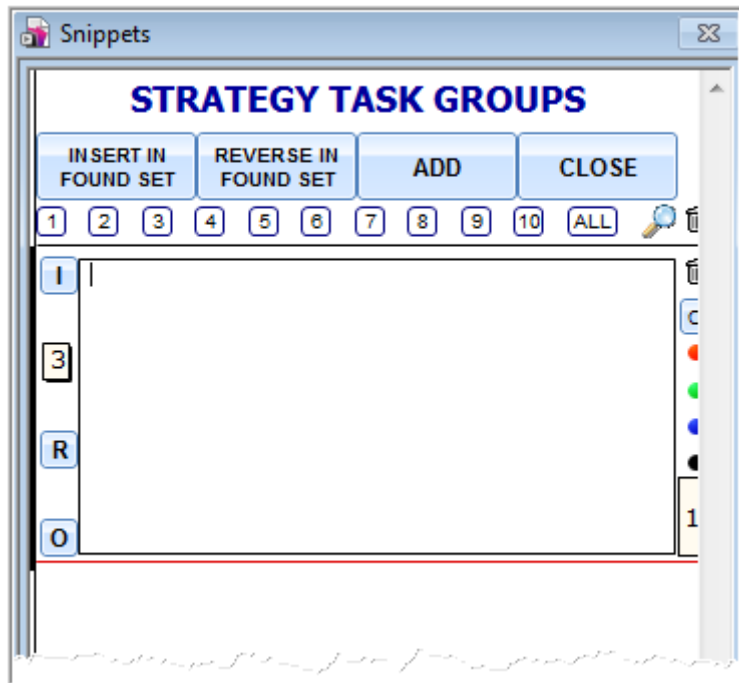


To add strategy tasks, click the Add button.



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.



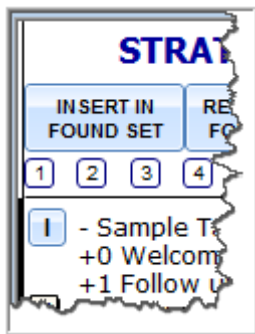
You can enter many ACTIONS in one Snippet or manually one per line for a complete Sales Strategy Cycle in one click.

- 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.

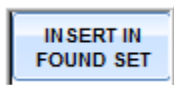
For example, we enter the following strategy tasks:



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					