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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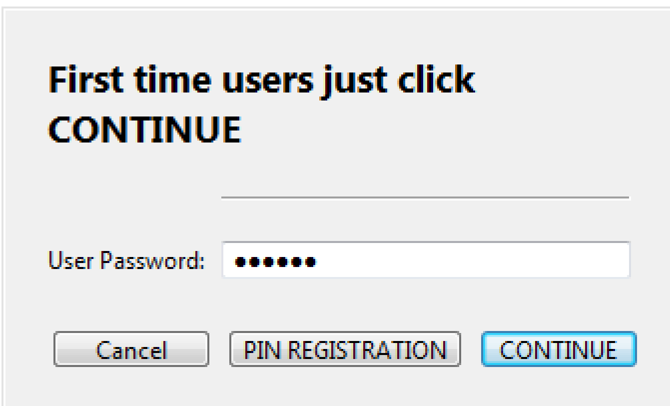
REGISTERING CREDIT MONEY MACHINE PRO

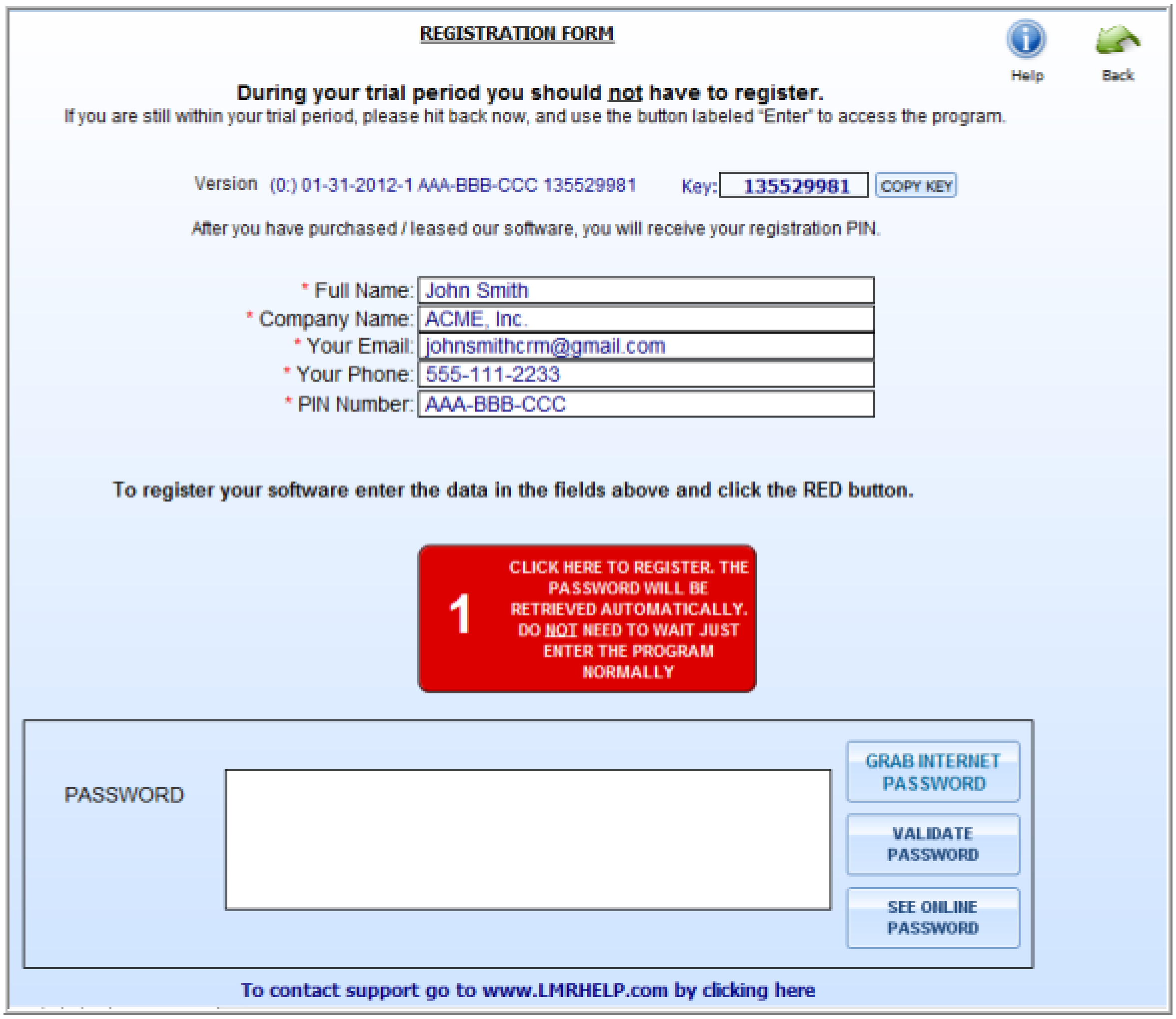
When you open the software you will see the Menu Screen.

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.



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.

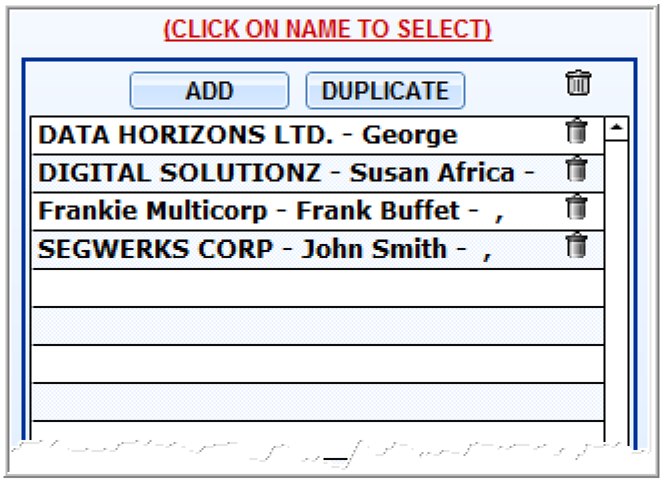
In the Company Information section, click the ADD button at the right side of the screen.

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

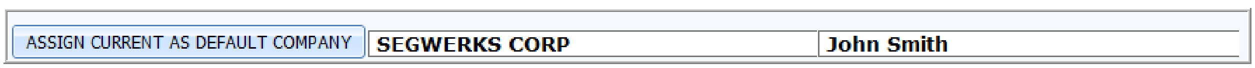
SELECTING DEFAULT COMPANY

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.

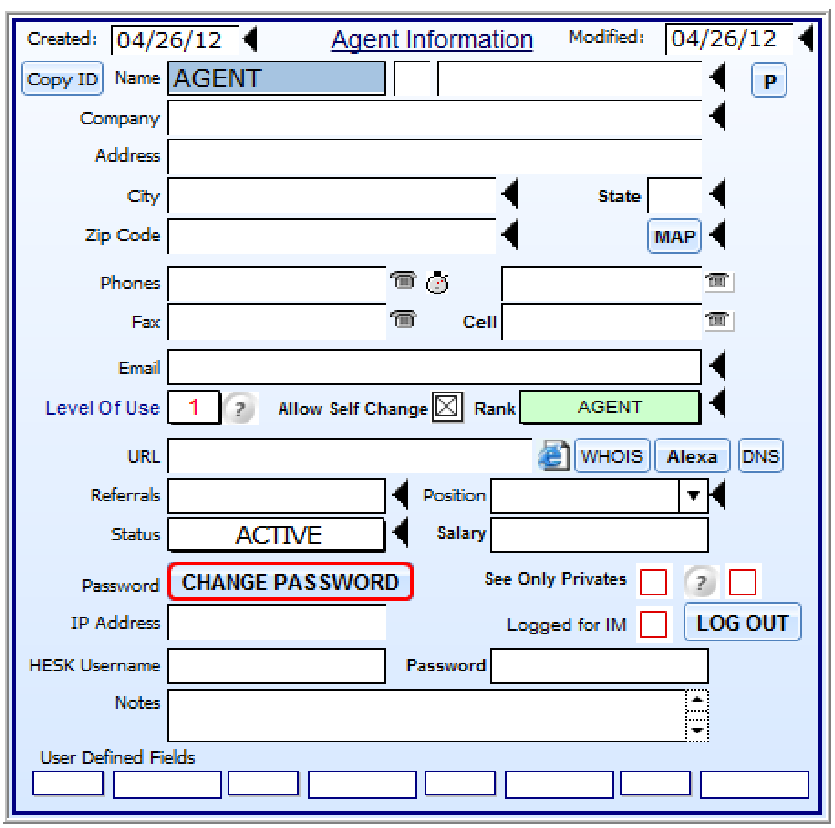
ENTERING BASIC AGENT INFORMATION

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

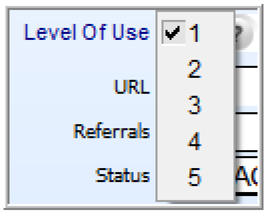
Once in the Setup, click the AGENT PRIVILEGES button.

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.

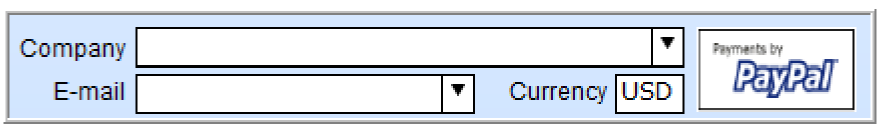


One of the most important data to fill in this section about the agent is the level of use. The level determines what level the agent can only access in the software.



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

REQUEST PAYMENT

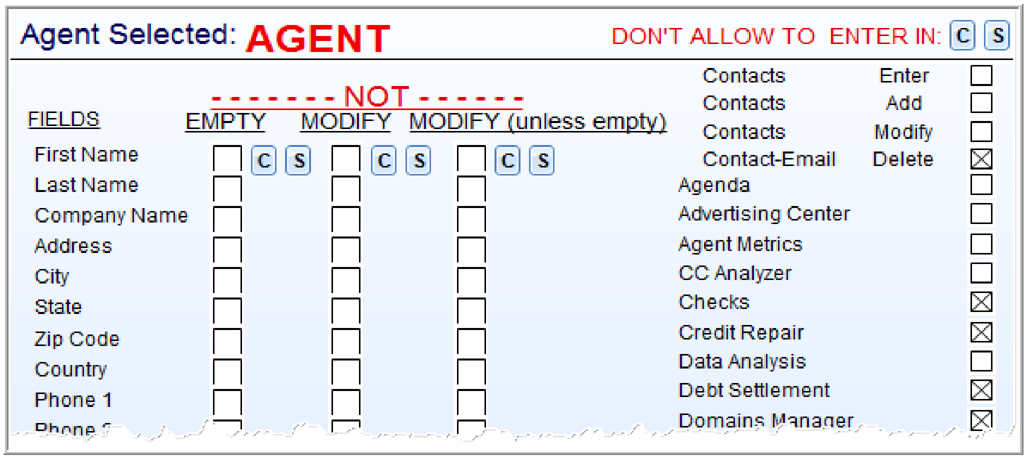


In the case where the agent requests payment, you can use this area of the Agent Privileges. You can do this if the agent requests for payment through PayPal.

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

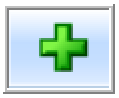
To control the agent's access to certain agent information fields in the software, check mark the check box of the fields that you don't want the agent to access.



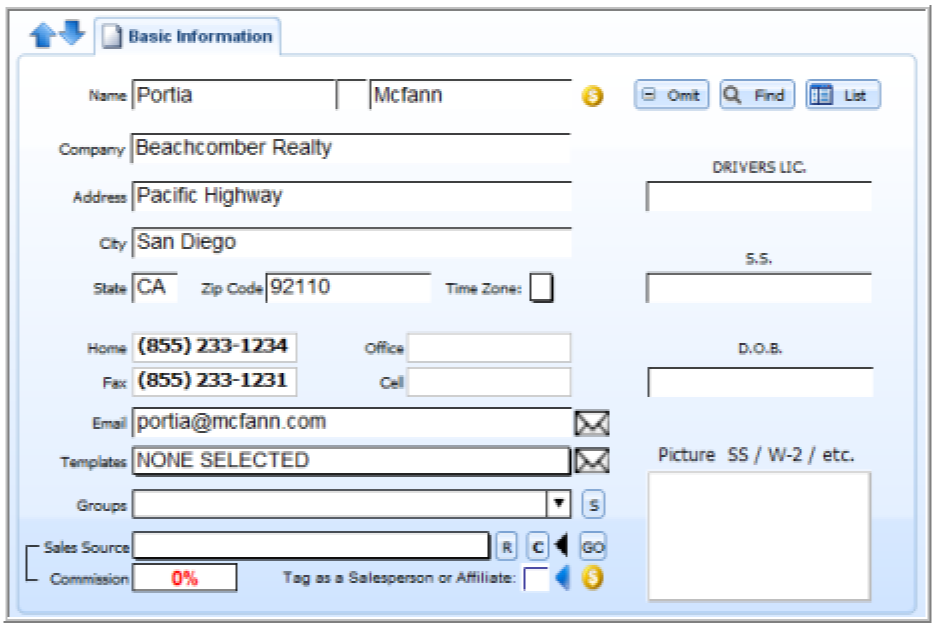
CLIENTS AND PROSPECTS

ADDING A NEW CLIENT

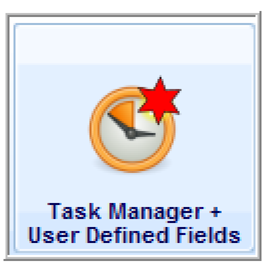
To add a new client (or contact) just click the Plus Icon at the top left of the Main Screen.



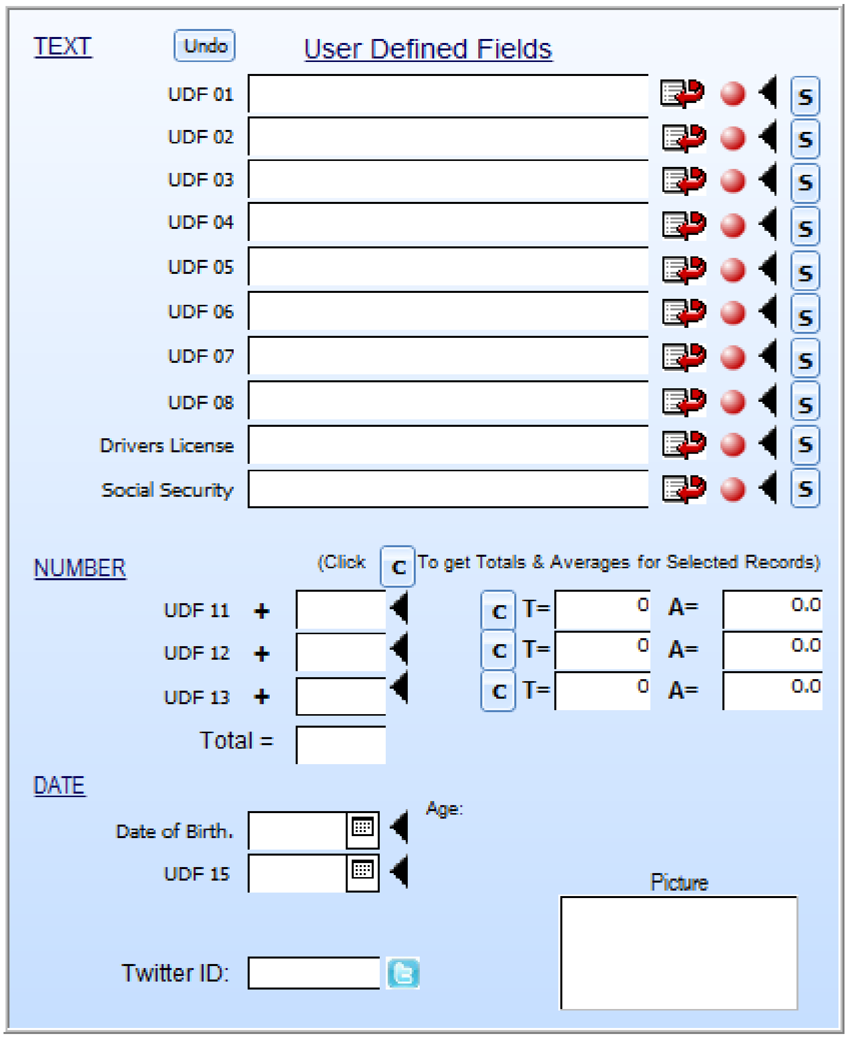
Enter the basic information for this client such as its name, address, phone number, etc.



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.



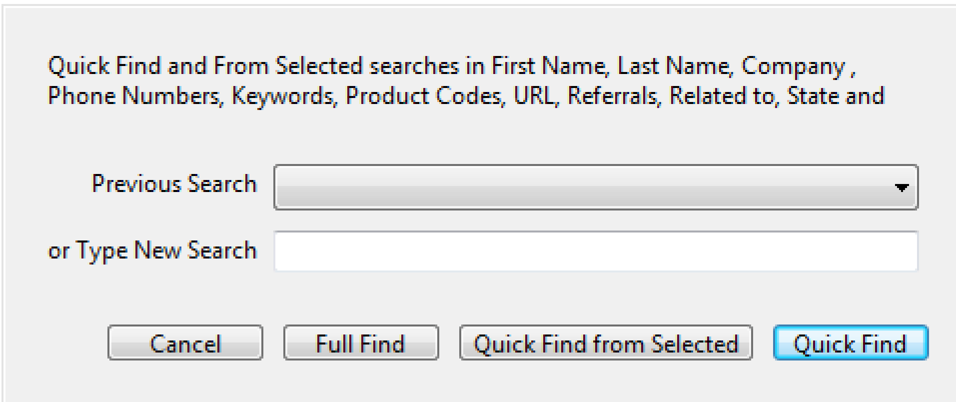
Be sure to format the Social Security in the way you want to appear in letters. The format of date should be entered like 01/01/1960 (4 or 2 digits for the year).

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.

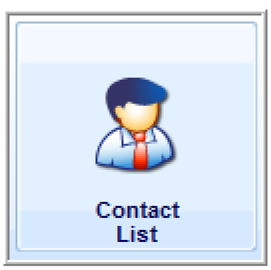
A windows dialog will then pop up where you can enter the query of information on the client/s you want to find.



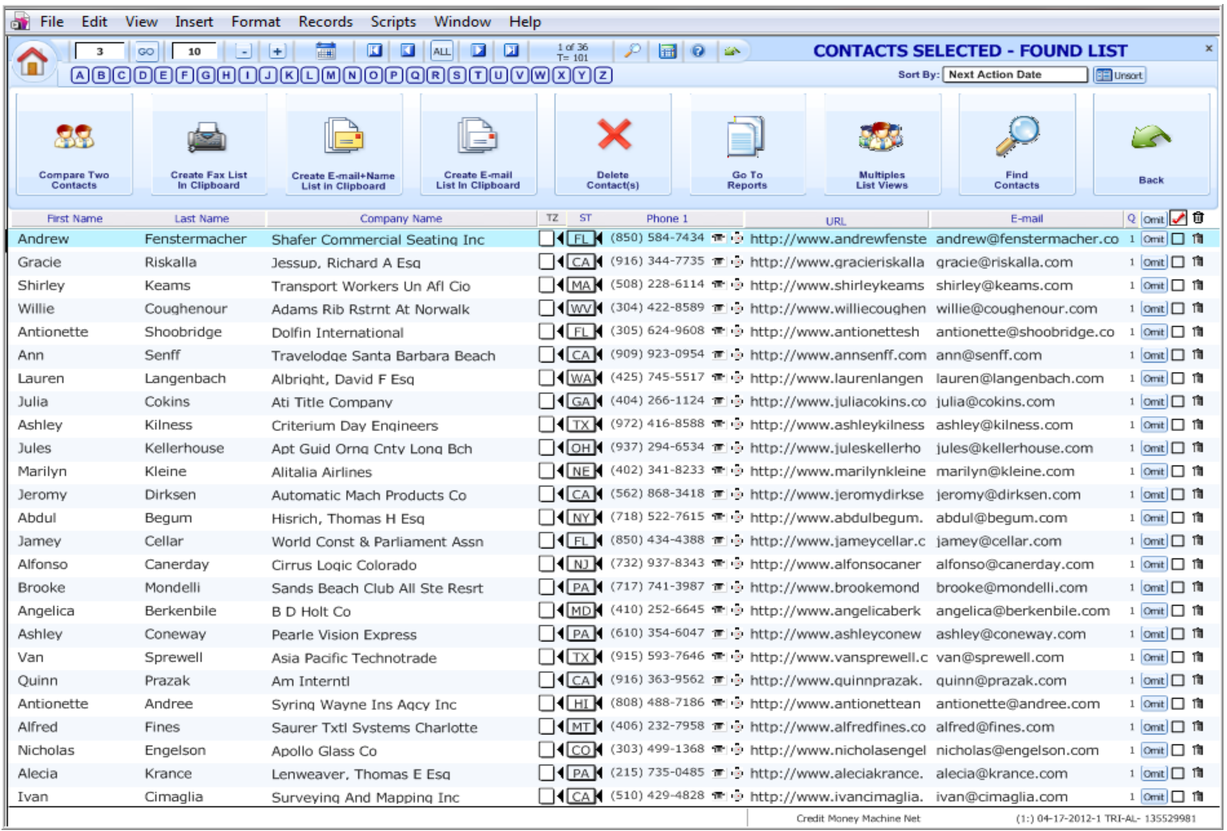
In the search field from the windows dialog, you can enter any query of information for the system to filter. Note that you can enter into the field different query of information at the same time (always put a space in between distinct queries)

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.

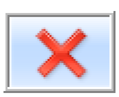


Now once the Contact List button is clicked, you will be directed to the Contacts Selected – Found List screen with the search results.



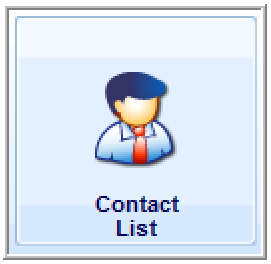
DELETING CONTACTS

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



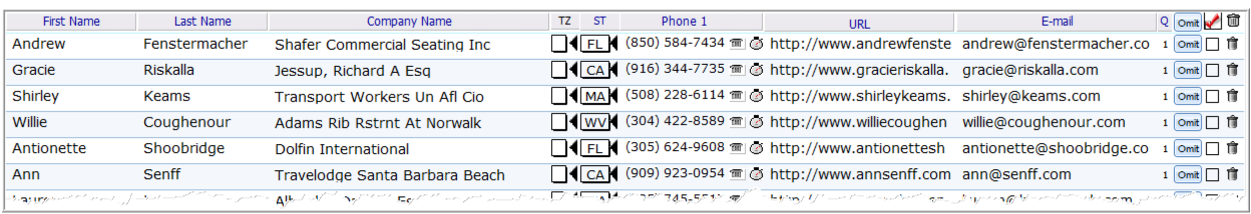
Another way is by displaying all the contacts in a list first and either delete them one by one or delete them in a group directly from there.

To do this, click CONTACT LIST button



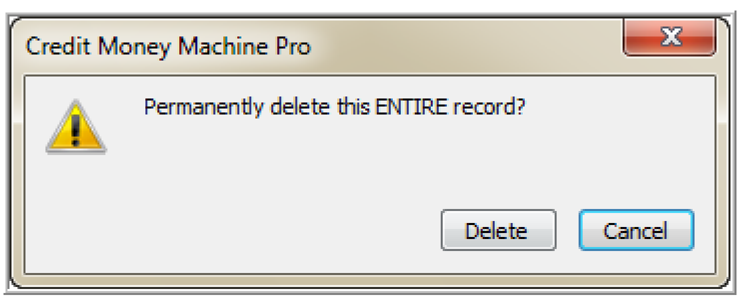
Or the LIST button in the Contact Information section

DELETING CONTACTS FROM LIST

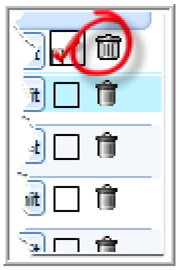


First Name	Last Name	Company Name	TZ	ST	Phone 1	URL	E-mail	Q	Omit		
Andrew	Fenstermacher	Shafer Commercial Seating Inc		FL	(850) 584-7434	http://www.andrewfenste	andrew@fenstermacher.co	1	Omit		
Gracie	Riskalla	Jessup, Richard A Esq		CA	(916) 344-7735	http://www.gracieriskalla.	gracie@riskalla.com	1	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		

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.

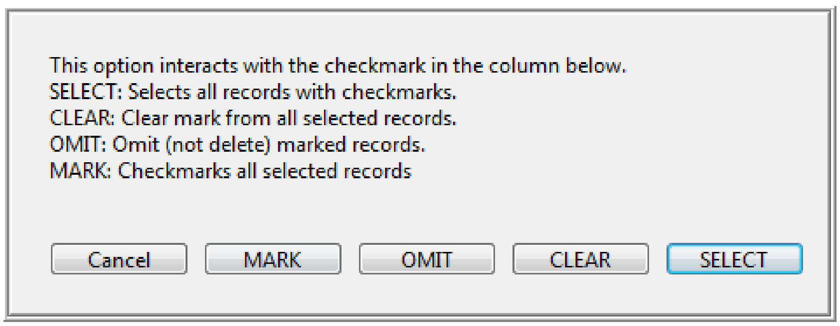


In the case where you don't want this to pop up every time you delete a contact, just click the GARBAGE BIN icon on top of all the same icons on the column.

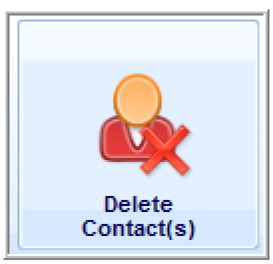


To delete contacts from the list ***BY GROUP***, mark the checkbox of the contacts that you want to delete at the same time.

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



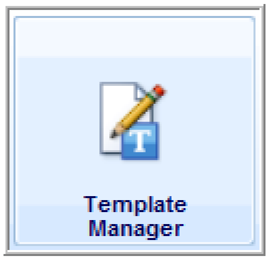
Once, the group of contacts to be deleted are marked, click the DELETE CONTACTS button.



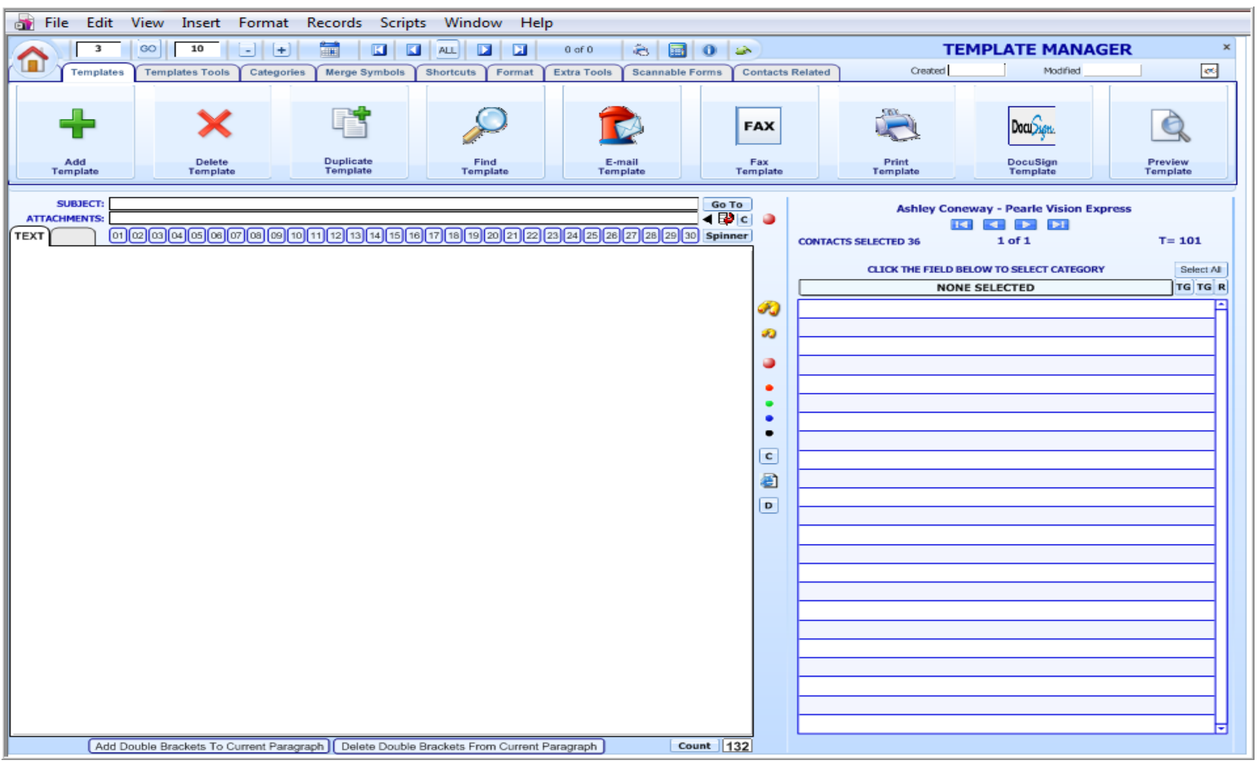
TEMPLATES FOR DISPUTES

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.

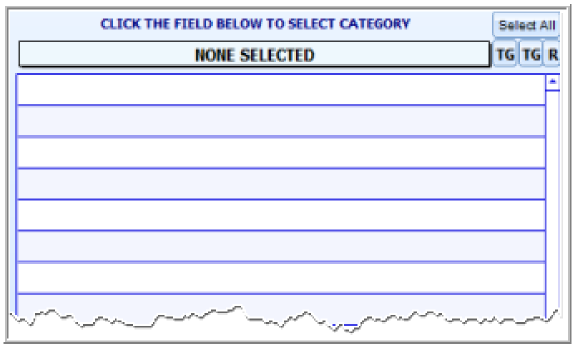


Now you should be in the Template Manager screen.

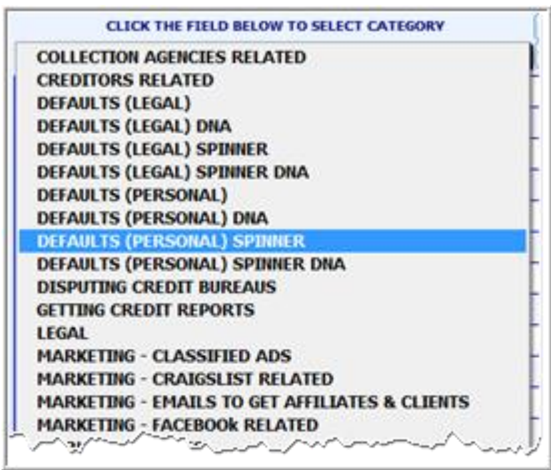


In the Template Manager, select the category of templates to use for your disputes in the Credit Repair area of the software.

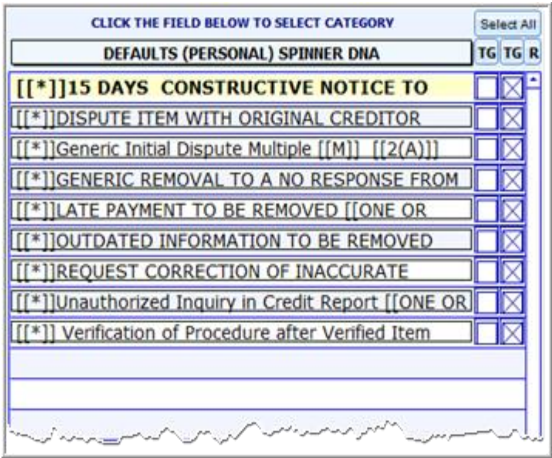
To do this, click on the template Category field and select from the available categories.



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.

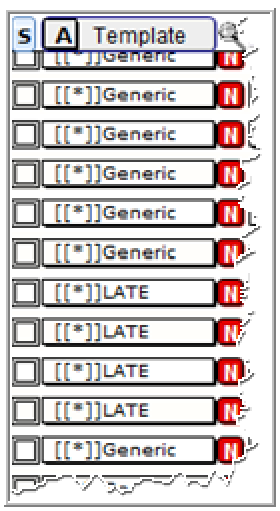


Below are the default templates under the category DEFAULTS (PERSONAL) SPINNER DNA. Mark ***the second checkbox*** of the template under the selected category to be used in your dispute entries. Or you can just click on the second TG button to mark all the templates under the selected category.



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.

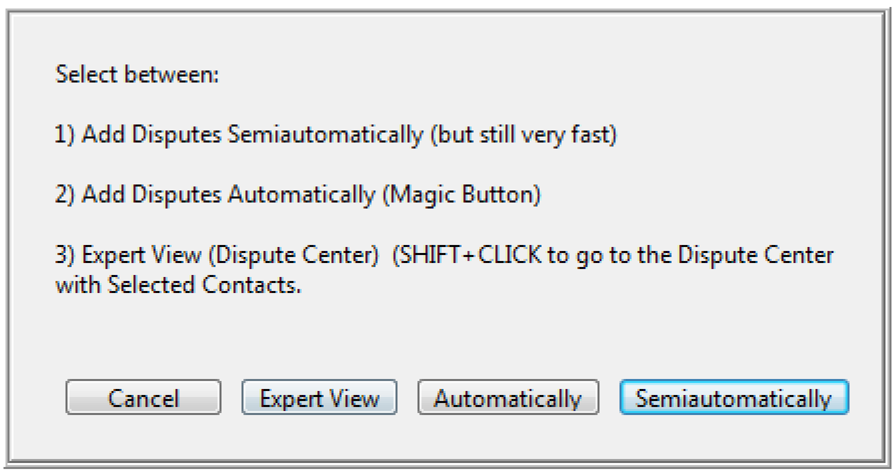


CREDIT REPAIR

THE DISPUTE CENTER

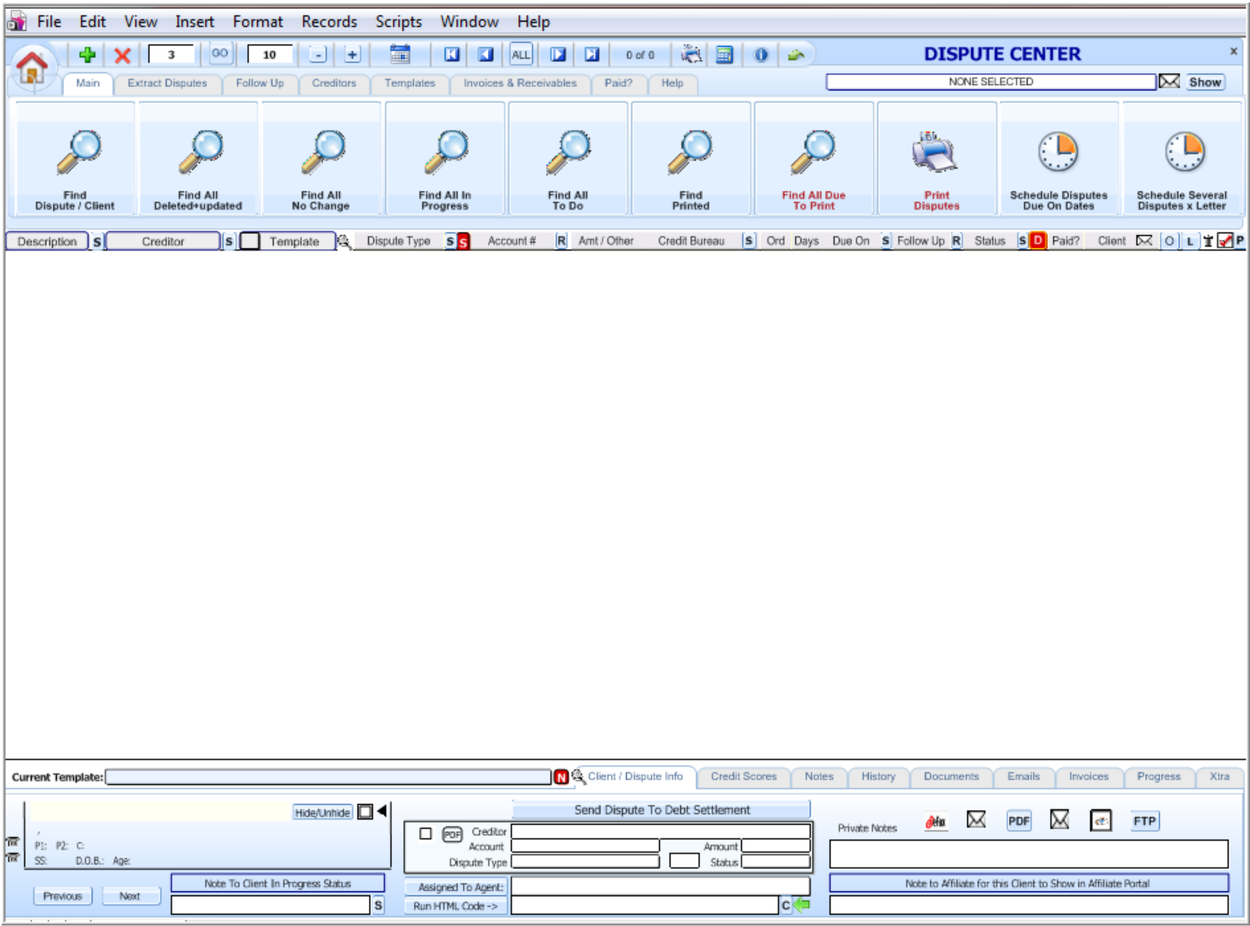
Once the basic data is entered you can proceed to the Dispute Center. You can do this in two ways.

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.

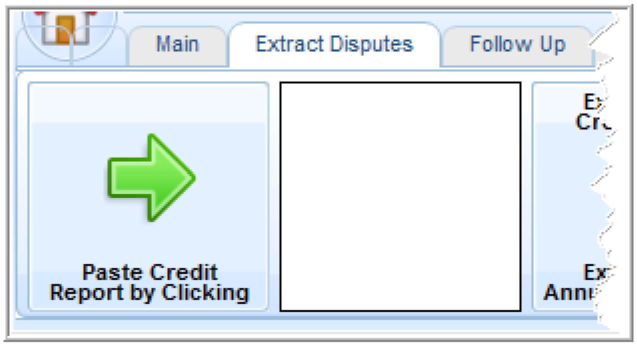


Now is time to download the Credit Report for your client. While it is possible to extract from credit reports of different credit report providers we recommend you to advise your client to use www.creditkeeper.com because it is easy to use and cheaper and it works flawlessly.

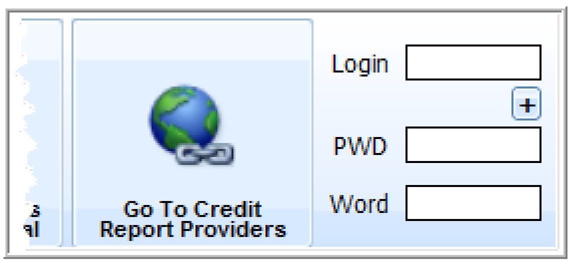
So from now on, these instructions will assume that you are using a Credit Keeper report from your client.

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.

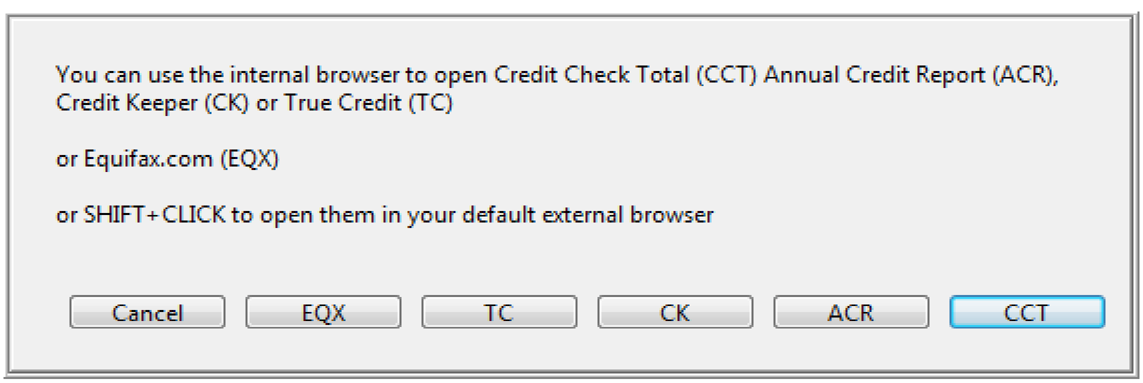


You can enter your client's Username, Password and Security Word in the right side of the screen



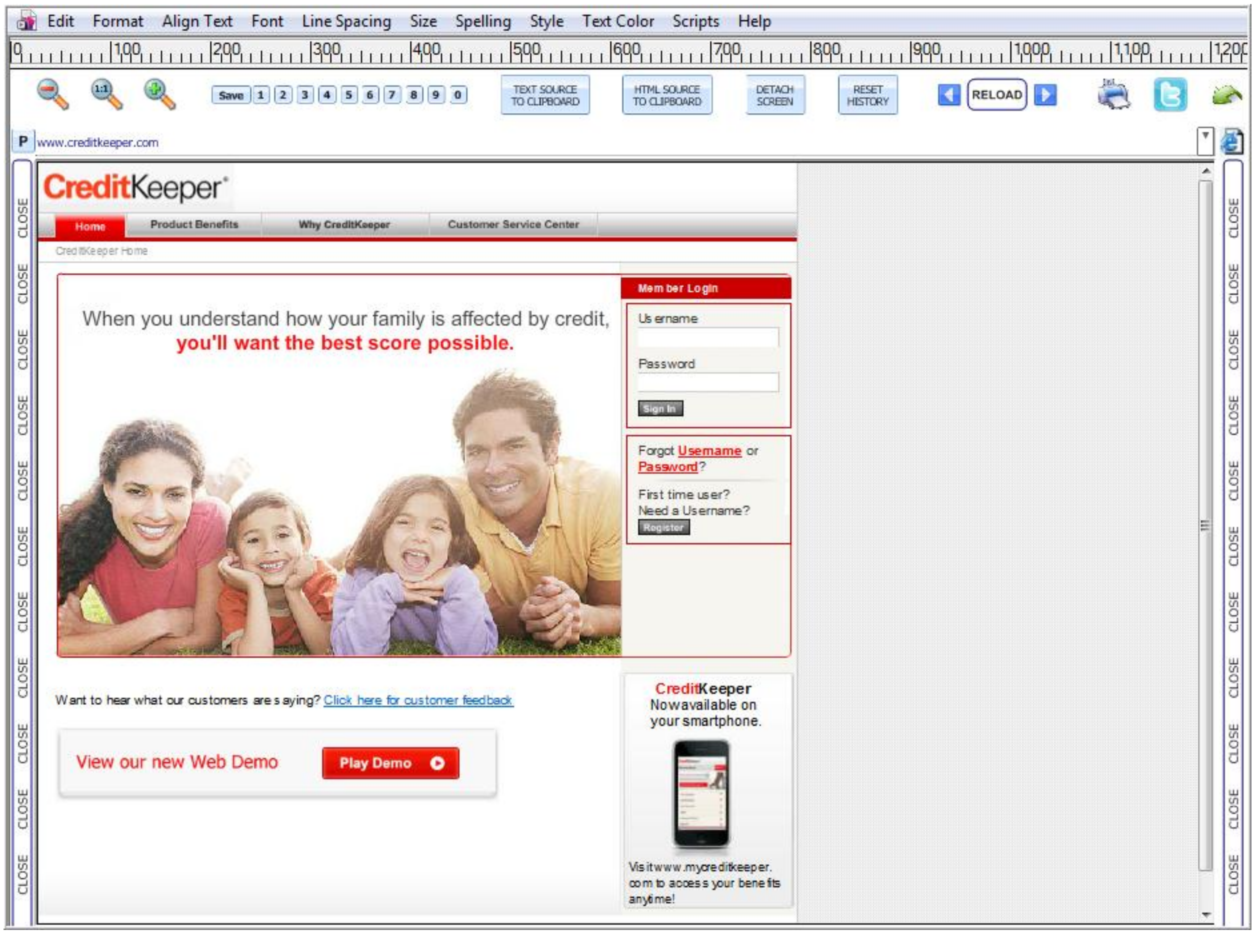
Notice that an empty line (row) is created automatically and once all disputes are extracted ***most will be deleted***.

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



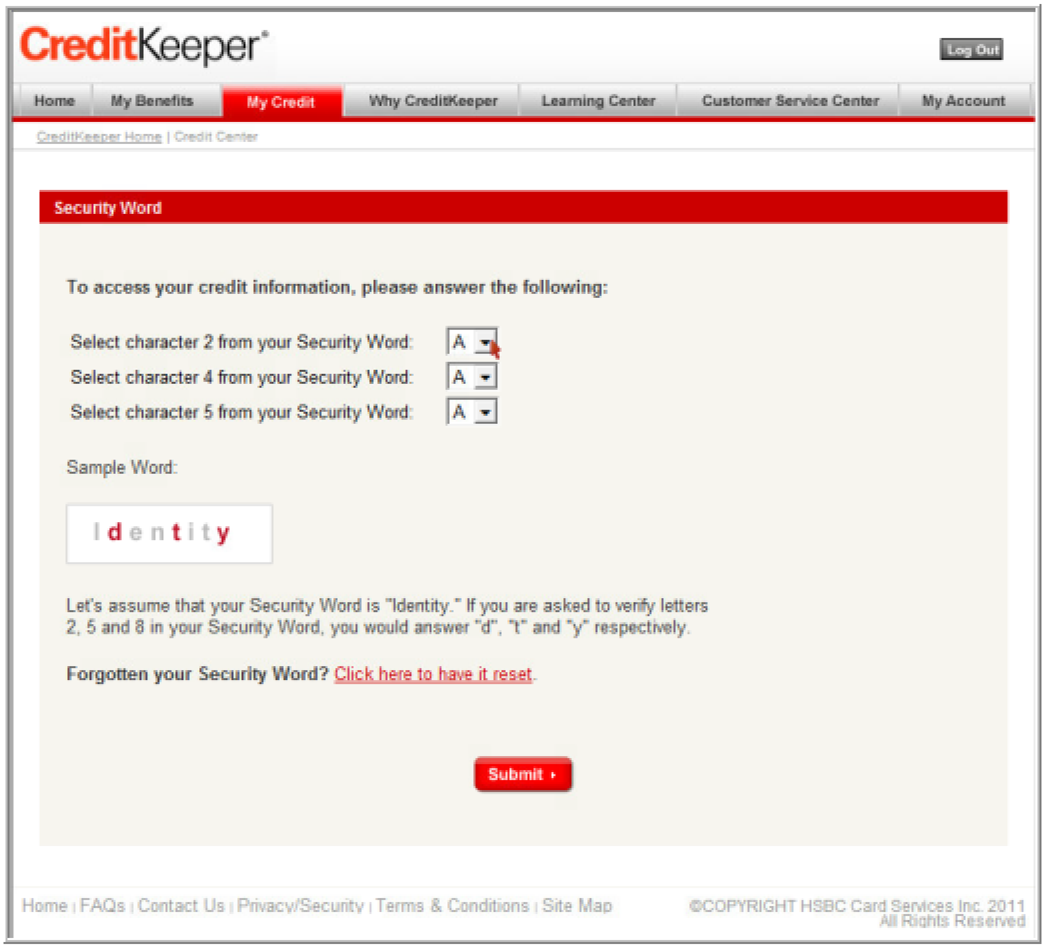
Once you click the CK button the www.CreditKeeper.com website will open inside the software.

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.

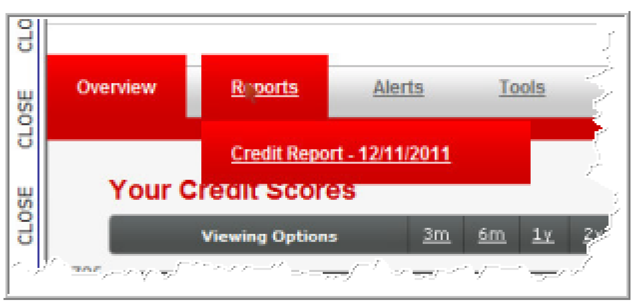


Once you enter into your Credit Keeper account, you can then access your credit information by clicking on the My Credit tab.

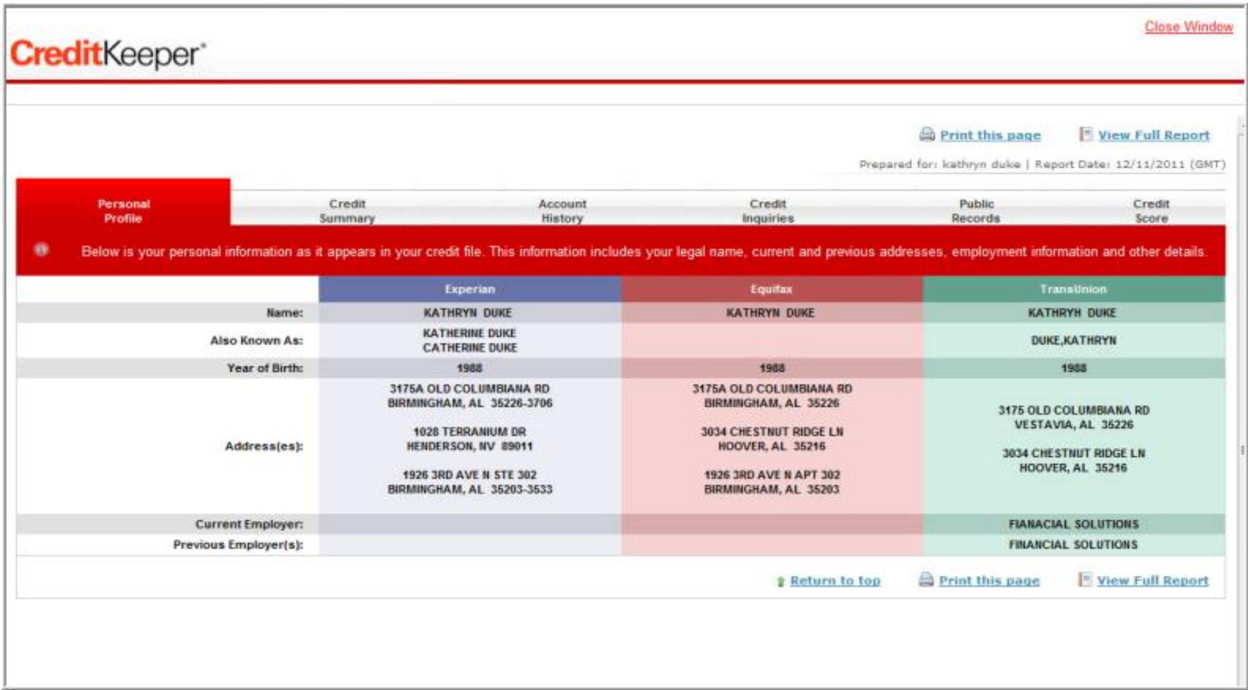
The first screen that you will see is to enter 3 letters related to the secret word. Please read the instructions and sample on how to do that.



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

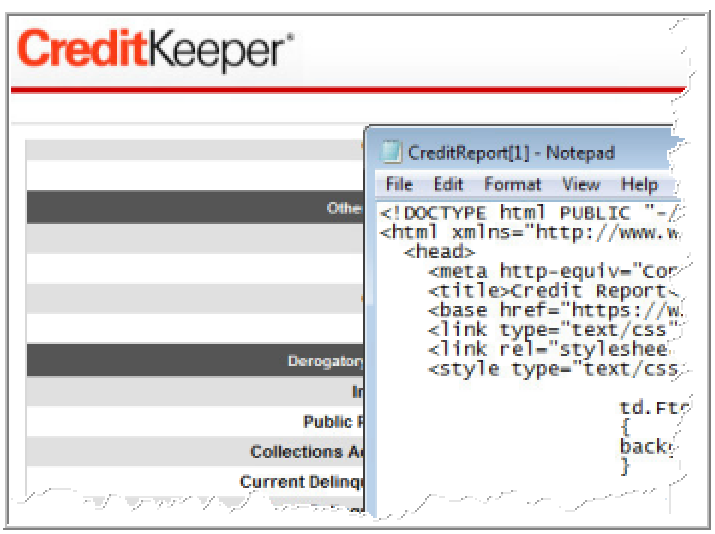


Now you should be in the Credit Report screen.



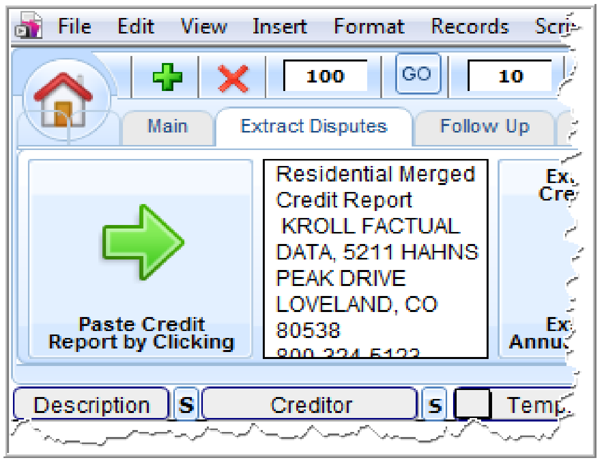
In the Credit Report screen, click the 'View Full Report' link. Once there, right click on the page and select View Page Source.

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

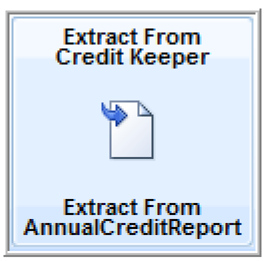


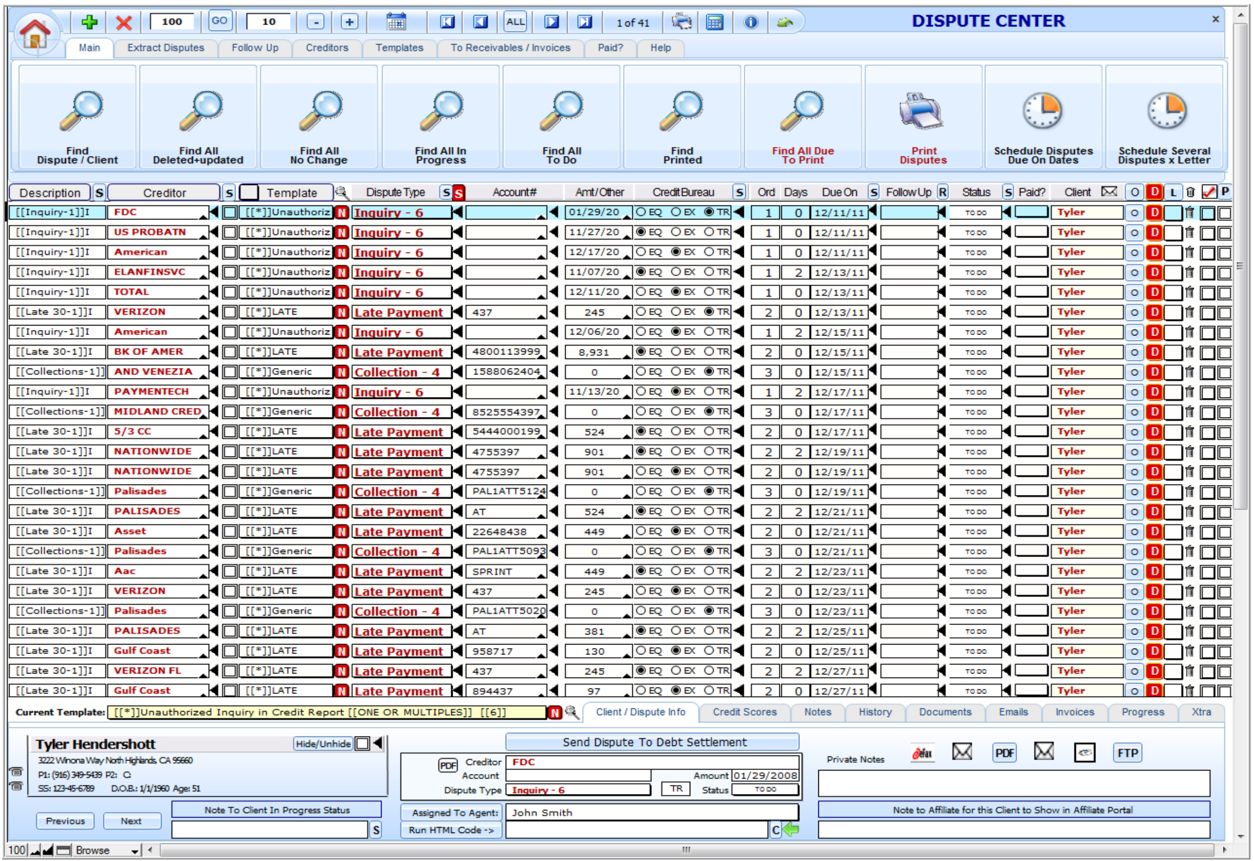
EXTRACTING THE DISPUTES

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.



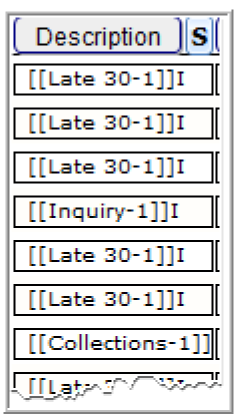
Then click the "Extract From Credit Keeper" button to extract all the items to dispute.



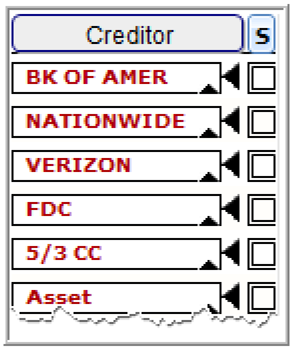


When you click the extract button only the derogatory are extracted:

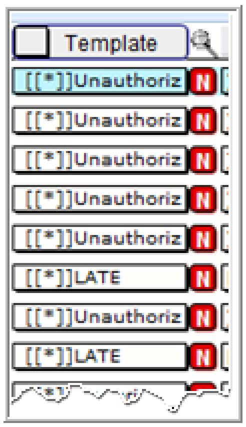
The Description / Reason for the dispute



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

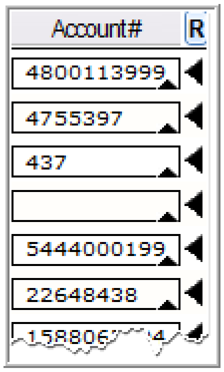


The Letters (templates) will be assigned automatically based on the Dispute Type.

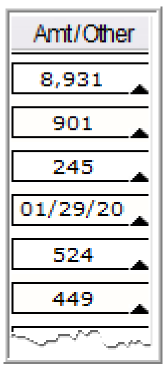


The Dispute Types will be assigned automatically for each Dispute Item.

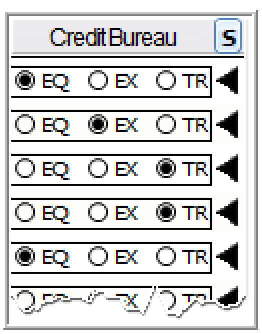
Also, the accounts are extracted automatically.



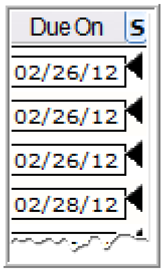
The amounts are extracted as appropriate as well as the dates for inquiries.



The Credit Bureaus are assigned automatically as appropriate.



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



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

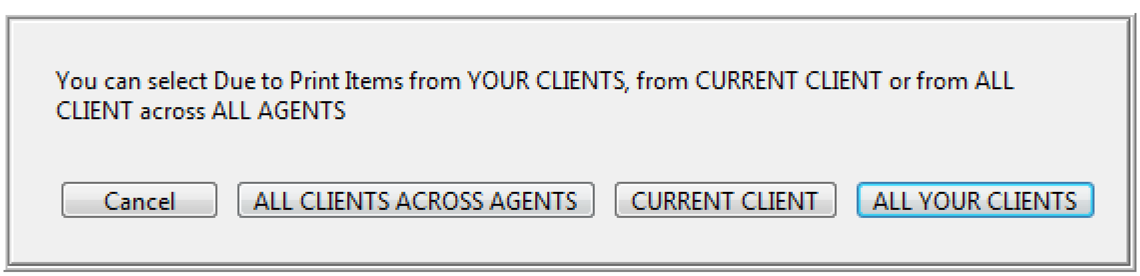
SELECTING ALL DISPUTES TO PRINT FOR ALL CLIENTS

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

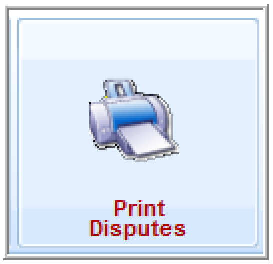
For this reason we can process them at the same time.

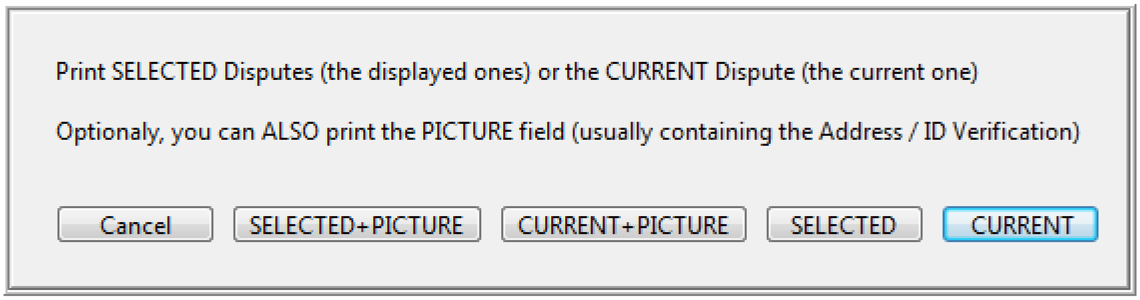
Just click the "Find All Due To Print" button

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.





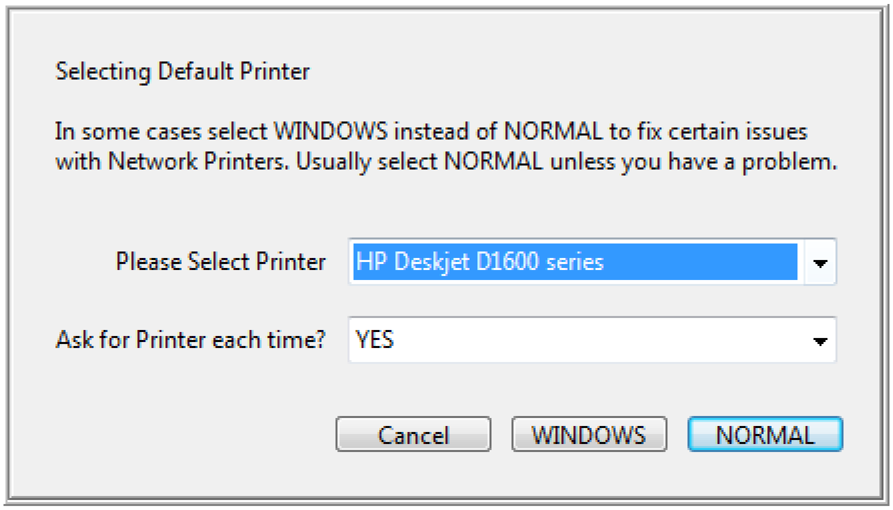
That’s if you have process and printed the disputes for all your clients at once.

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.

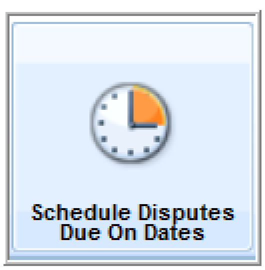


This will resolve all printing issues. You will need to repeat this every time that you upgrade to a new version.

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.

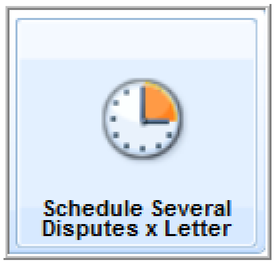
To change the number of days in between batches of letters just click the "Schedule Disputes Due on Dates" button and set a different number of days.



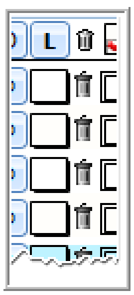
SETTING SEVERAL DISPUTES PER LETTER

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 most be the same
2) The Template assigned most be the same
3) The status most 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.

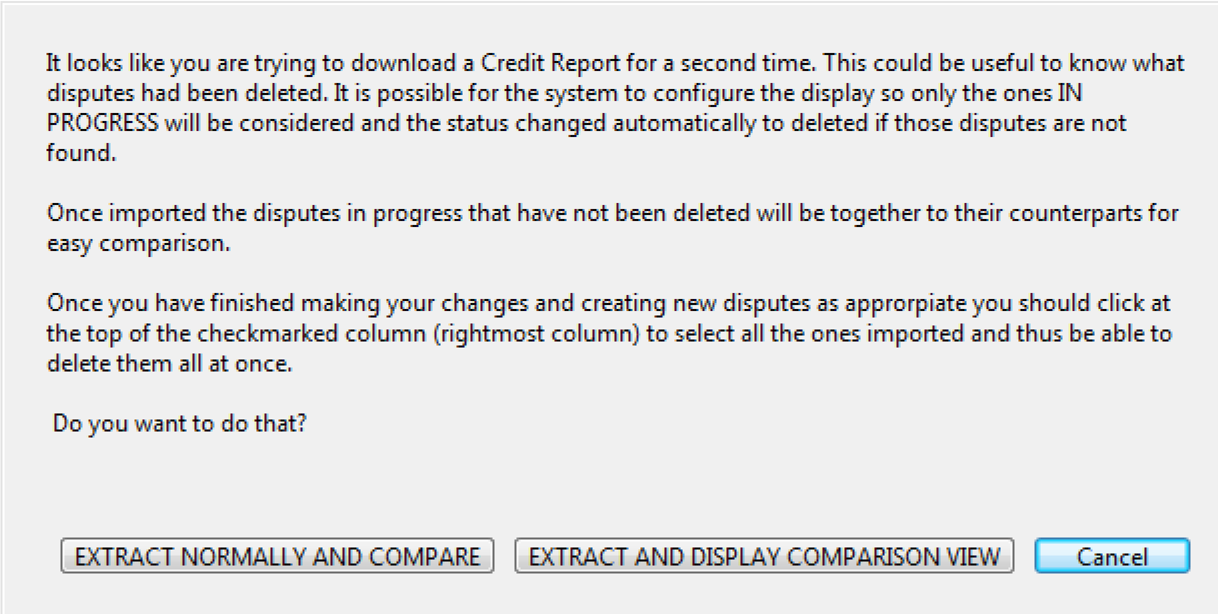
These tools can be used as consulting tools to charge an initial setup fee unrelated to your credit repair efforts which ideally should be "Pay Per Deletion"

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.

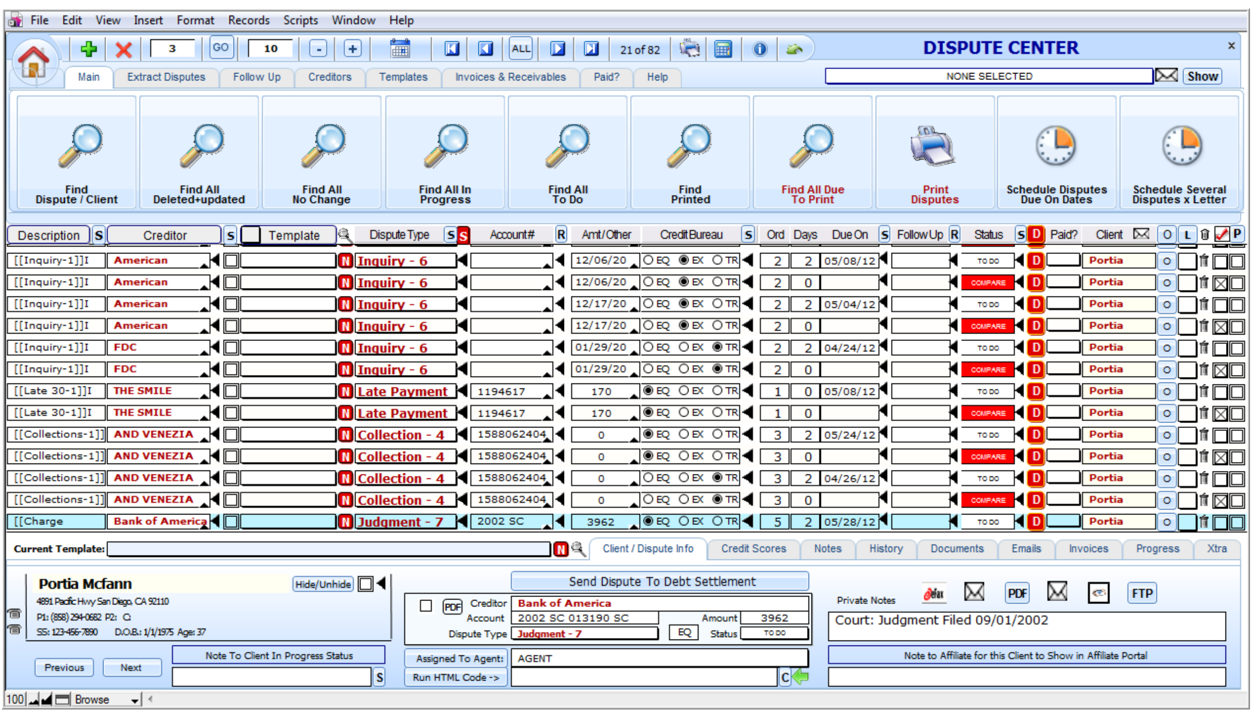
The procedure is as follows:

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.



This will produce a view similar to the one below.

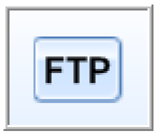


Notice that the Status column has changed from TO DO to other status such as NO CHANGE, COMPARE, DELETED, etc.

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

POST DISPUTES IN YOUR INTERNET SERVER

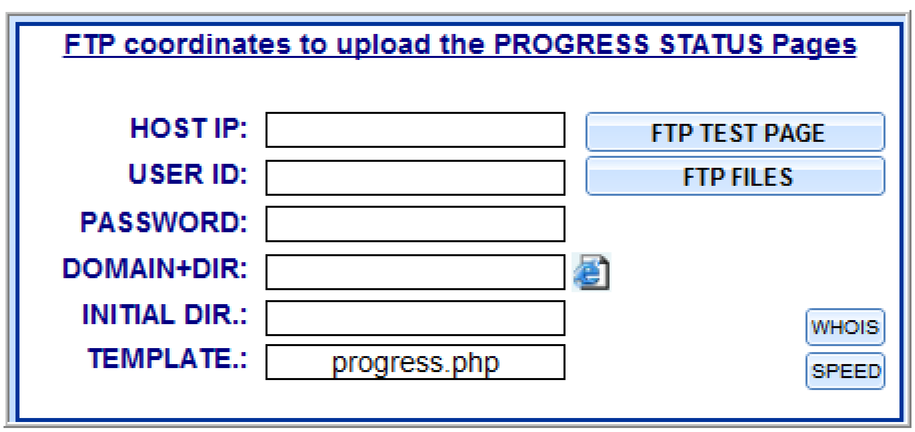
To submit your disputes in your internet server, click the FTP button (located at bottom right of the Dispute Center screen). Follow the instructions provided by the tooltip of the FTP button displayed by hovering on the button.



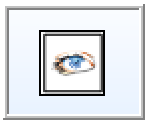
In the instruction from the tooltip, you are asked to enter the FTP information and the name of the company. To do this, you need to access FTP & Internet Related under Setup area

Setup can be accessed by clicking the Setup icon at the upper right part of the main screen.

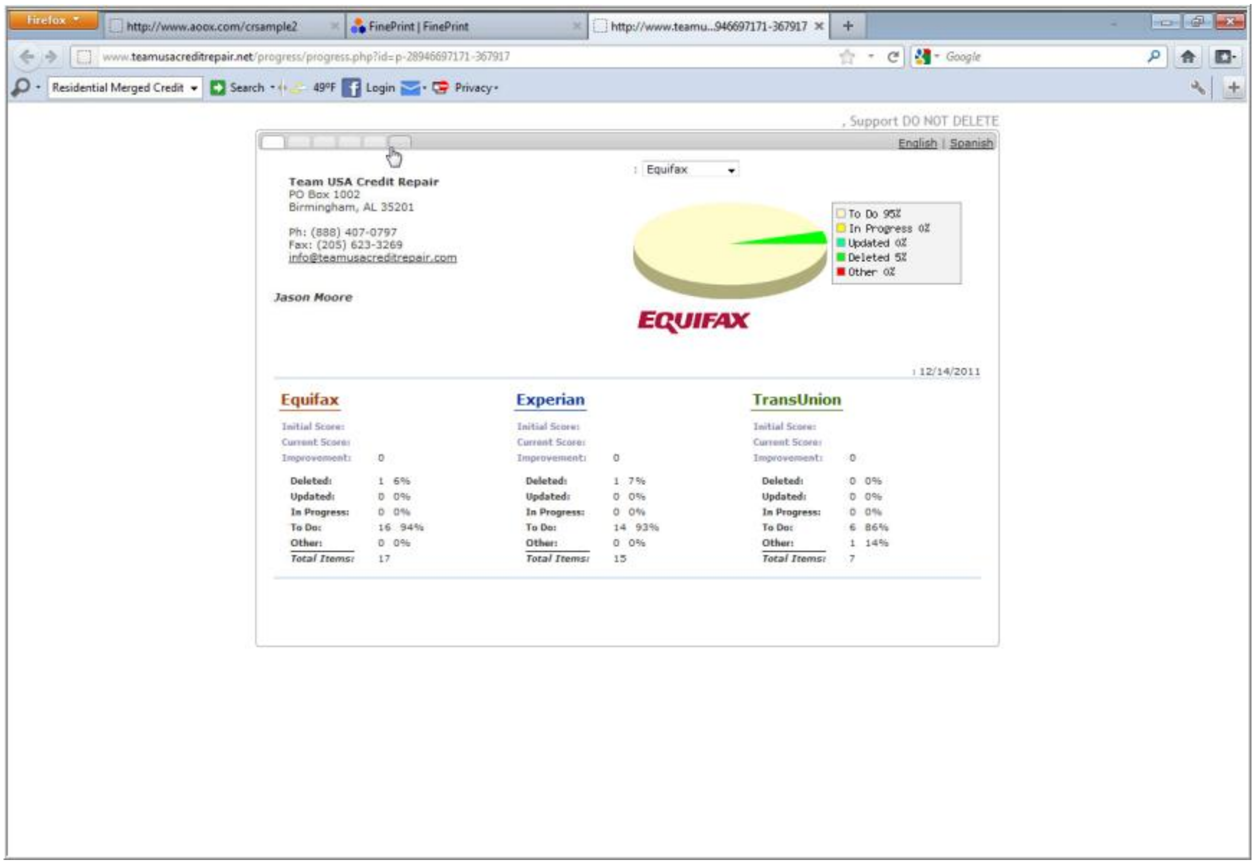
Inside the FTP & Internet Related area of the Setup, enter the FTP information in the FTP and Progress Status section.



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).



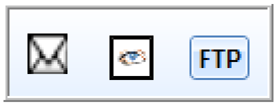
Below is the web page from a default browser with the default company name and the disputes submitted in the internet server.



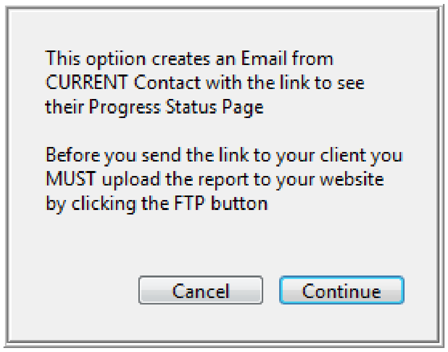
EMAIL CLIENT WITH THE DISPUTESIN THE PROGRESS STATUS

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.

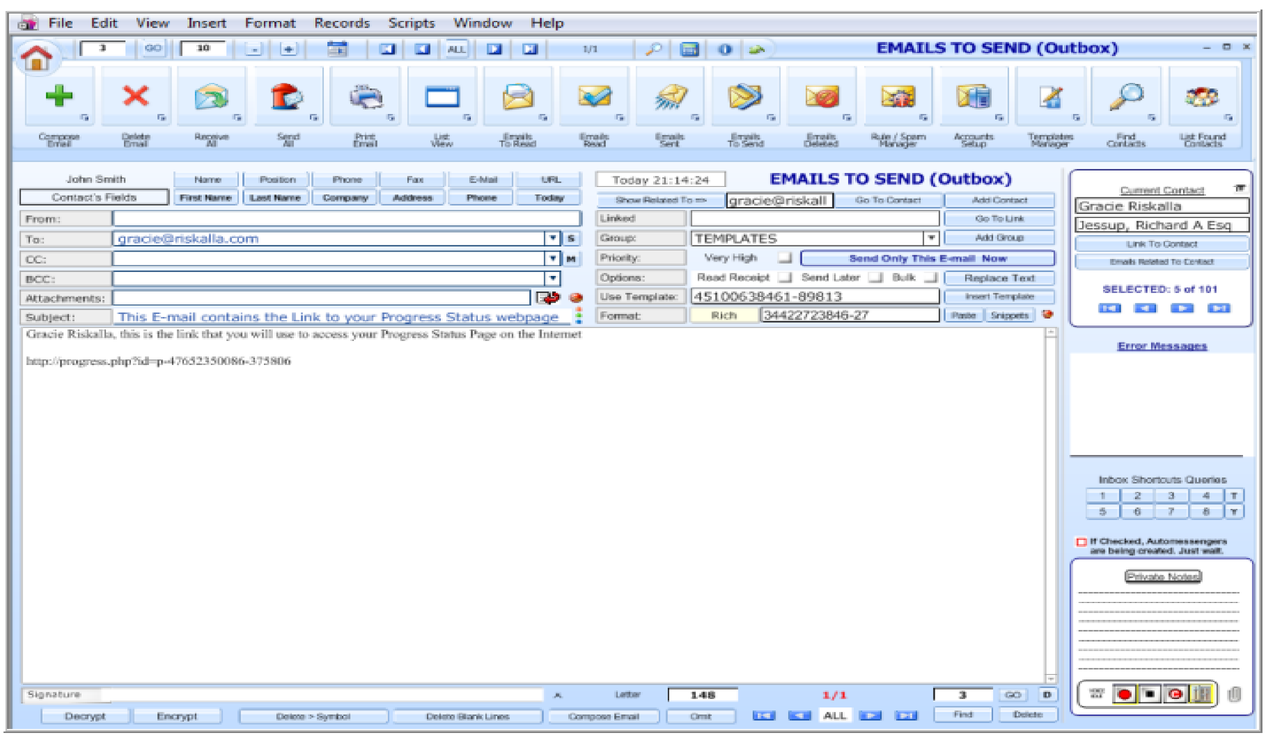
To email selected clients with the link, click the email icon beside the display icon



And click Continue

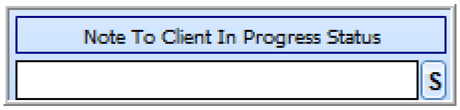


Automatically, you will be directed to the Email System of the software where the required fields are already provided such as the email to be sent and the email of the sender (which is the agent currently logged in) and the subject of the email together with the link of the Progress State you just have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



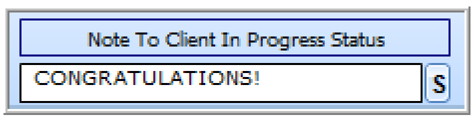
NOTE TO CLIENT IN PROGRESS STATUS

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.

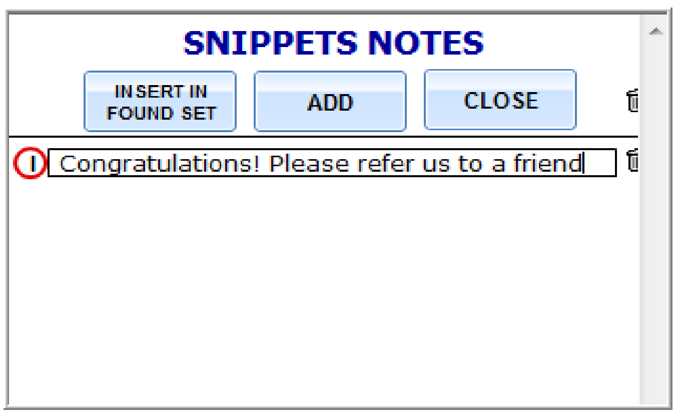


There are two ways on which you can add a note to the client.

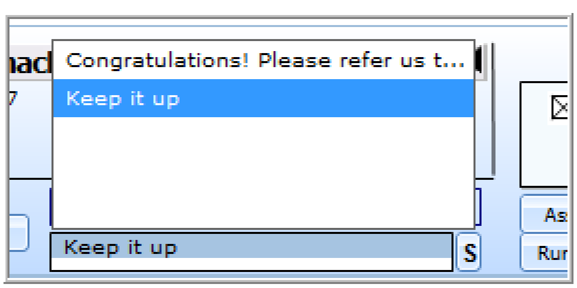
1) You can directly enter the note or text into the note field.



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.



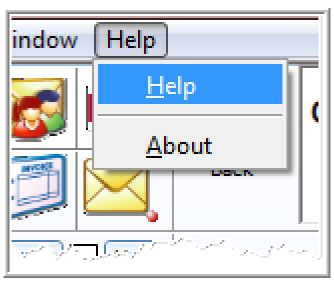
HELP

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.

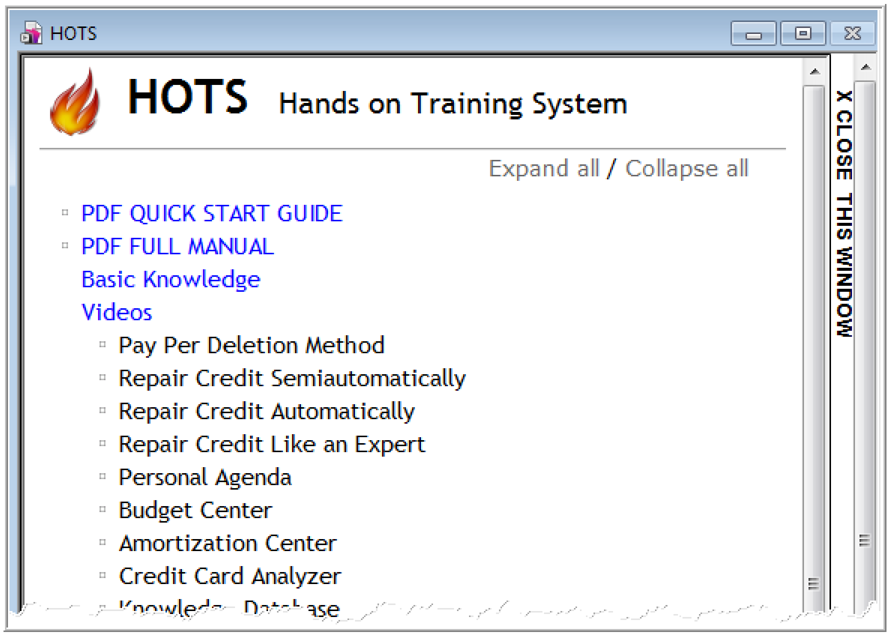
1) By clicking the HELP icon (located at the upper part of the main screen Levels 1, 2, and 3.).

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.



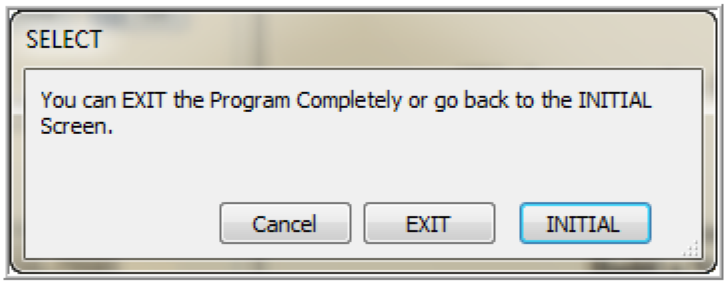
The blue color of the text on the list means that it can still be expanded. To expand, just click and select from the list under it. To expand all from the list at the same time, click the "Expand All". Otherwise, click the "Collapse All" to shrink them all back.

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.

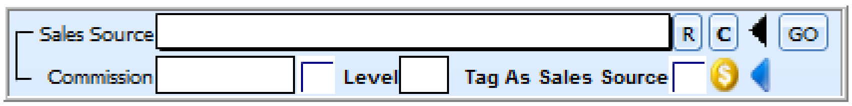


INTEGRATED COMMISSION SYSTEM

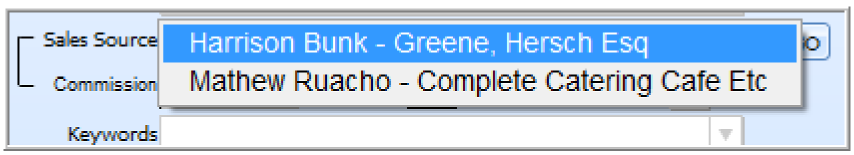
ASSIGNING COMMISSIONS TO YOUR SALES PEOPLE AND AFFILIATES

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

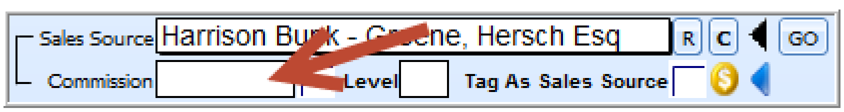
To do that, check mark the Tag As Sales Source the contact you want to assign (located at the bottom part of the Contact Information section)



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



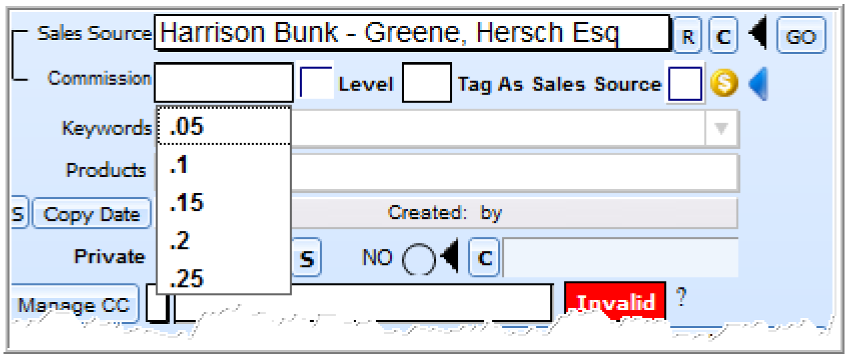
When you already have assigned a sales source to the current contact, you can type either an integer or a percentage that you want to pay to this sales person in the commission field.



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.

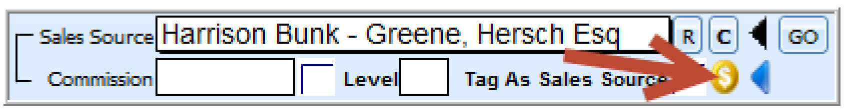
Or you can just click on the field and select from the predefined list of integers.



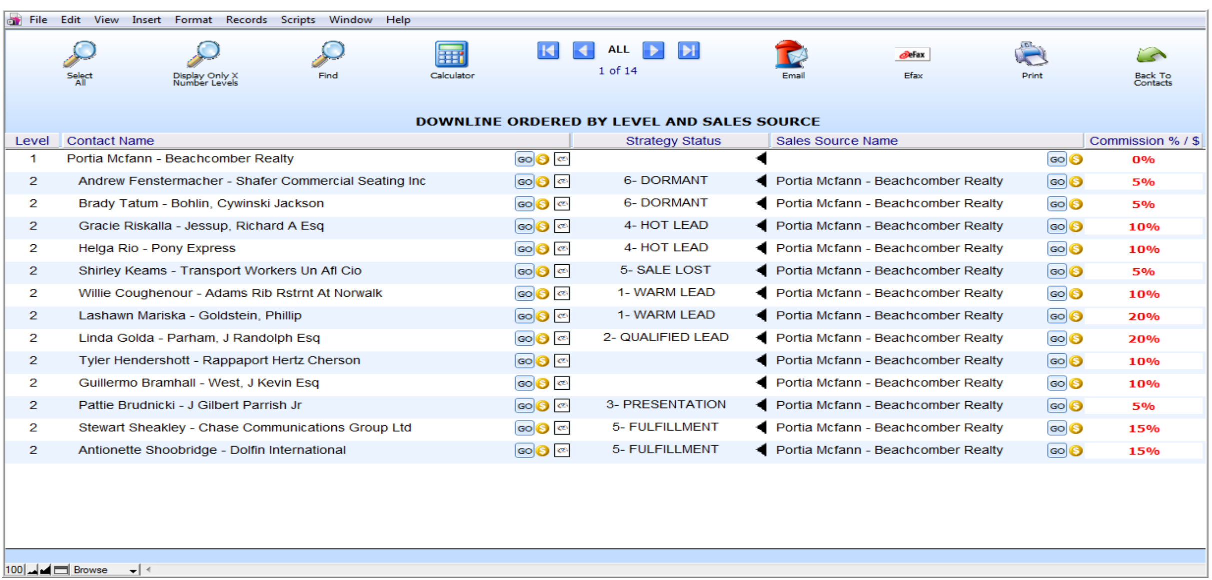
DISPLAYING THE DOWNLINE LIST

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.

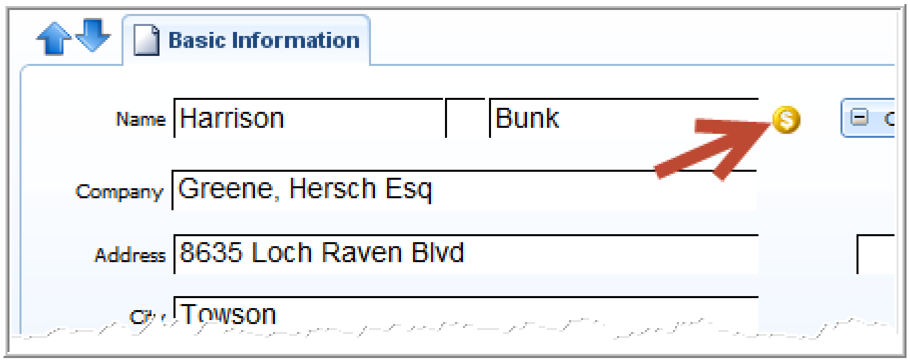


Then you will be directed to the Downline List screen.

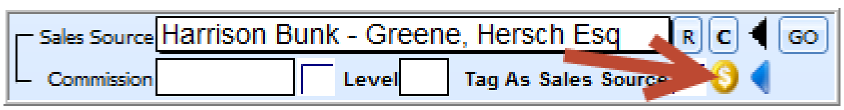


SELECT IMMEDIATE DOWNLINE OF SALES PERSON

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



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)

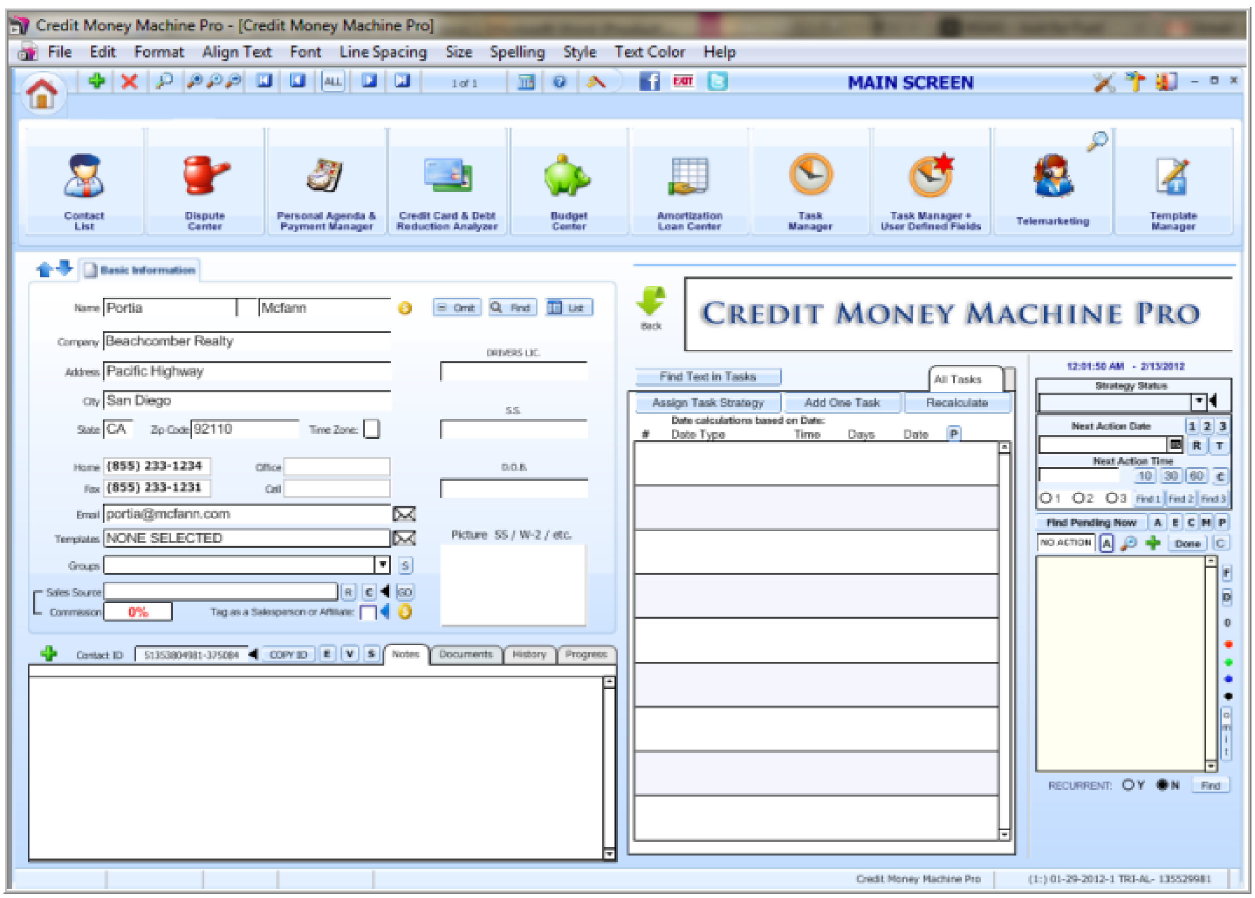


TASK MANAGER

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.

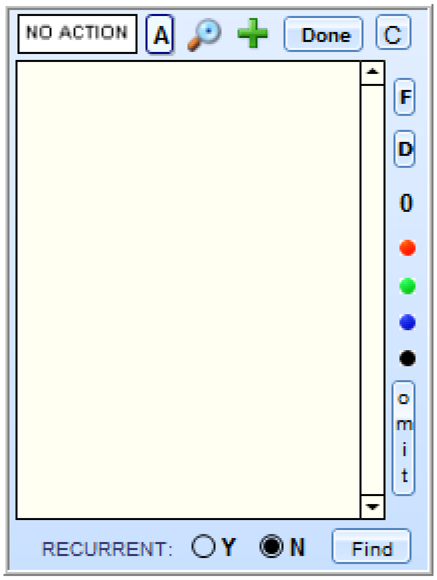
Note that the Task Manager is displayed ON the main screen once accessed without going inside the software.



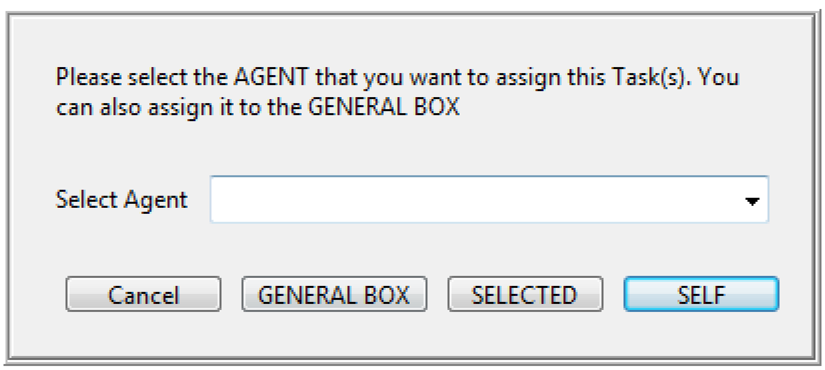
ADDING A TASK

USING THE GREEN PLUS BUTTON

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



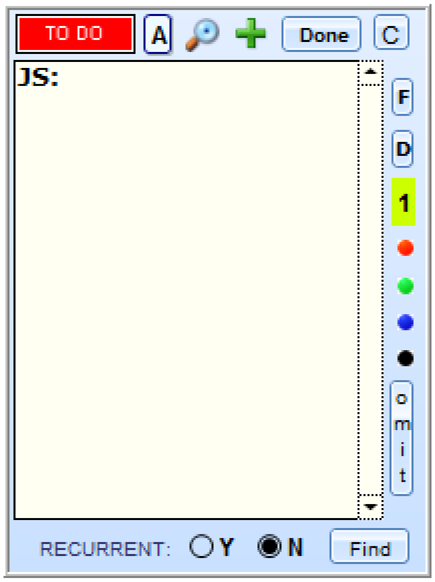
Then select the agent to assign the task.



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,



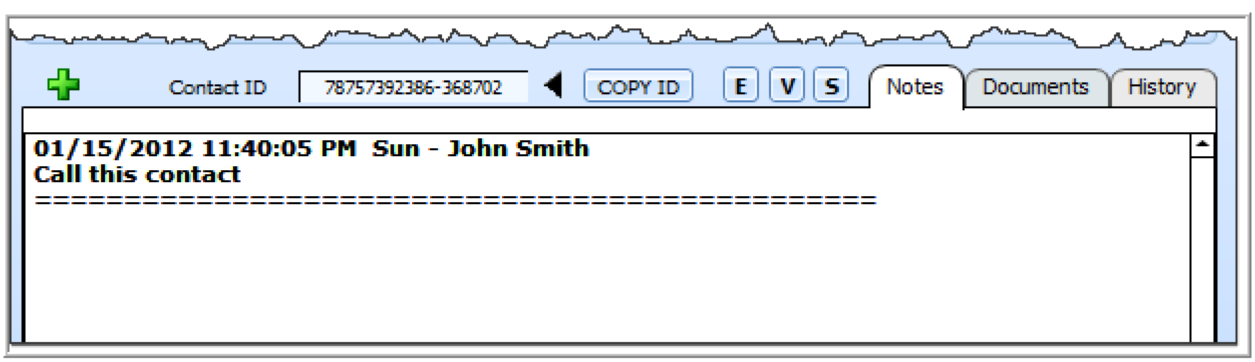
Then click on the task box to write the task with regards to the current contact.

USING THE F BUTTON

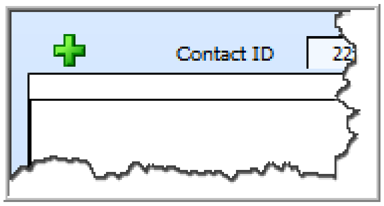
The F button stands for FOLLOW UP which is usually used when you have some descriptive notes for the task.

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)".

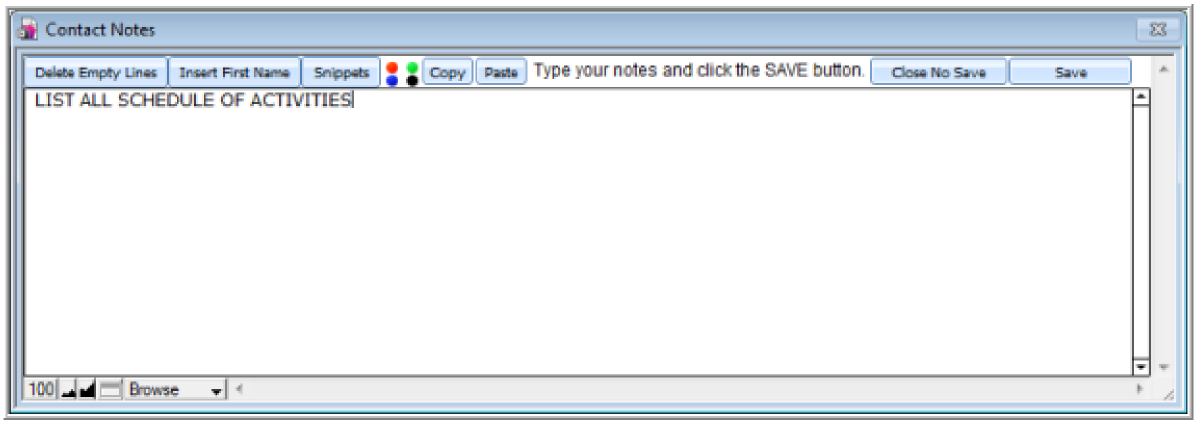
So instead of having to put the task in the task box, you can have it in the Notes area under the current contact's Contact Information Section.



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.



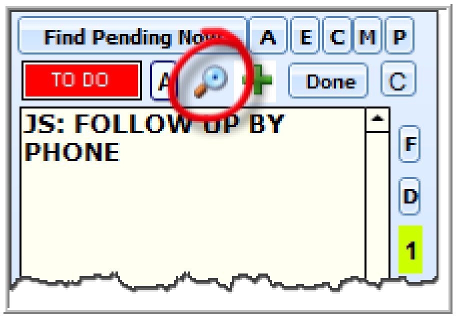
Note that this is a very <u>different approach</u> of creating a personal task just like in PERSONAL AGENDA in a way that using the software's TASK MANAGER, the tasks are created for you to do to the client linked to it.

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.

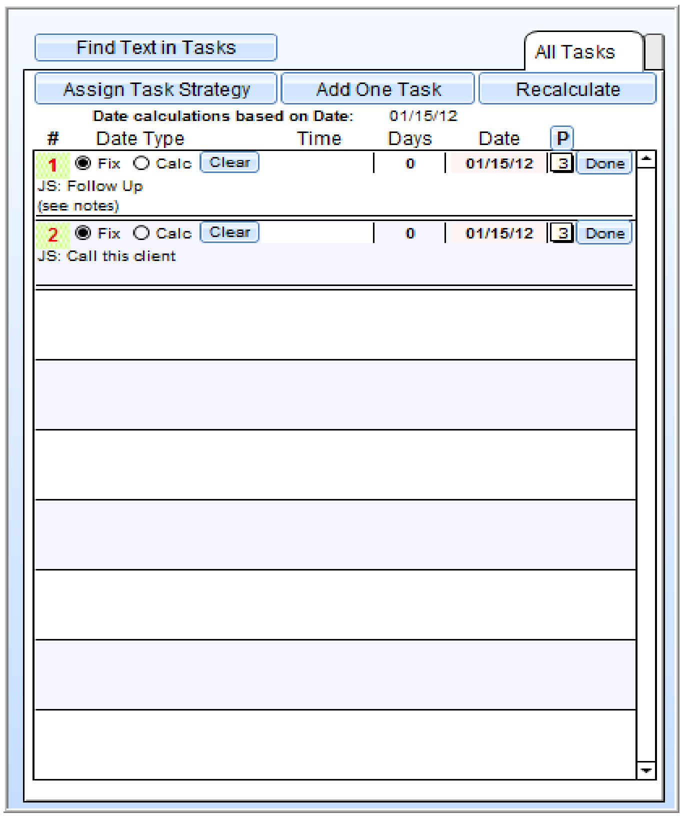
TASK SCHEDULER LIST

All the task created that is to do to a certain client are displayed in one list called <u>Task Scheduler List</u>. 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.

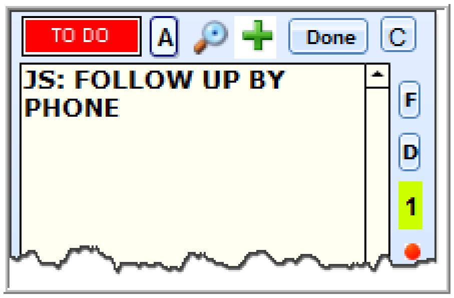


The Task Scheduler List is shown in the figure below.



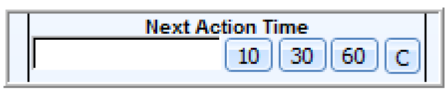
HOW TO RESCHEDULE TASK

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.

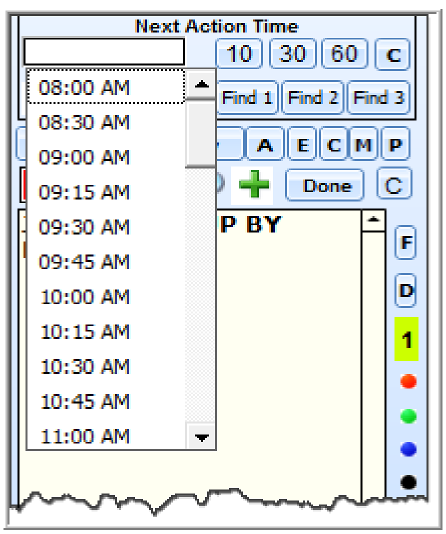


There are several ways to reschedule a task based on the TIME.

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.



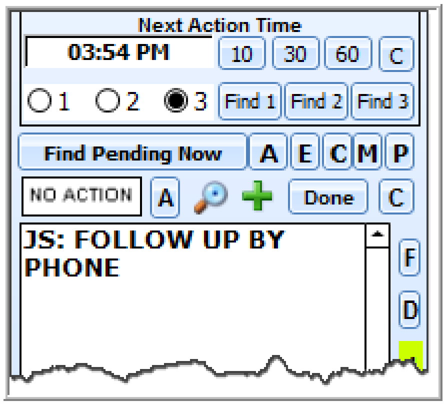
2) By clicking on the time field and selecting from the given default time list.



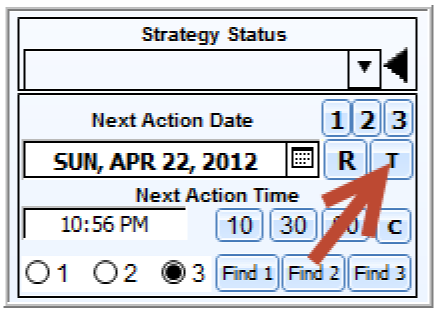
3) By manually entering the time based on the software time format HH:MM A.

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.

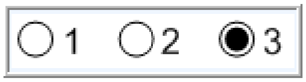
HOW TO SET PRIORITY TO TASKS

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

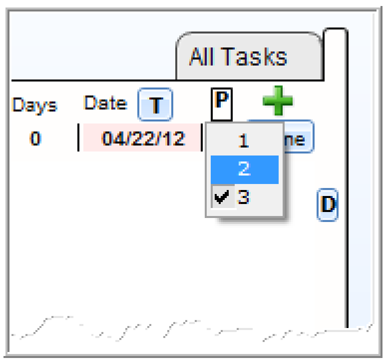
Note that the Task Manager has priorities 1 to 3: 1 having the highest priority and 3 having the lowest. When you create a task for a client, the task manager will set the priority of the task to 3 by default.

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

1) By selecting from the radio buttons



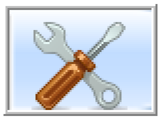
2) By the drop down priority list in the Task Scheduler List



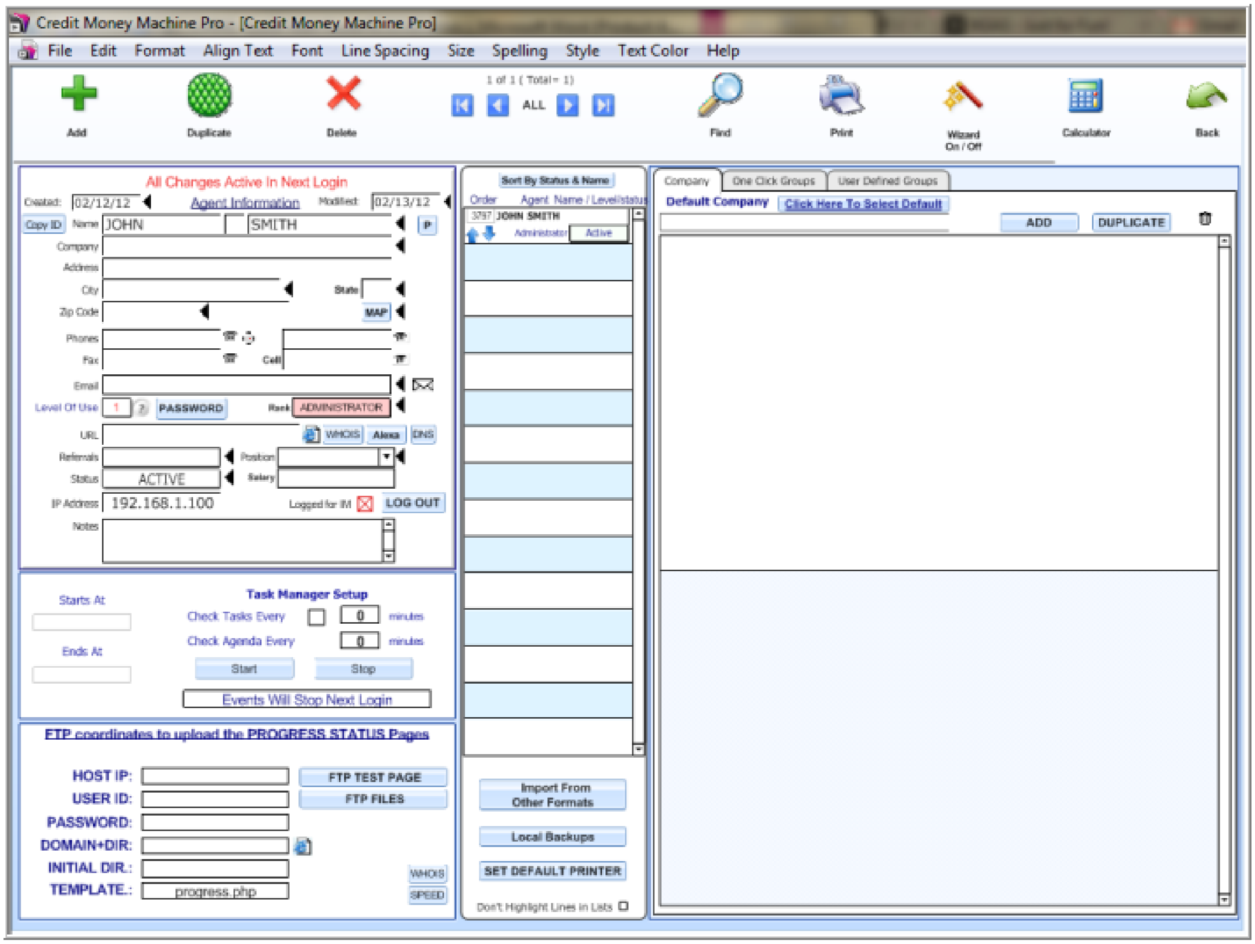
CHECK TASKS EVERY DESIGNATED MINUTES

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.

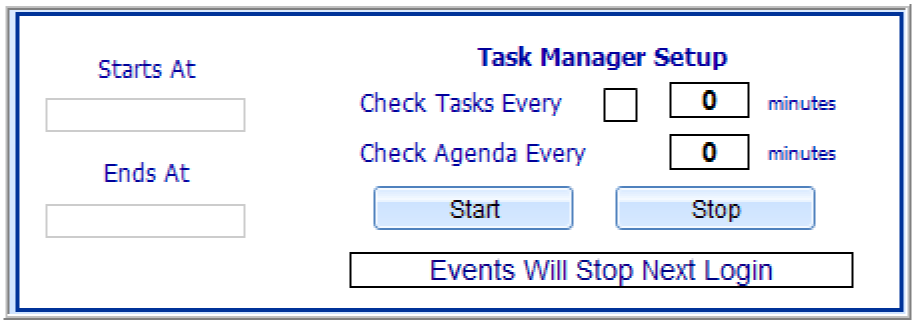
For the software to check the tasks for you and at the same time remind you through pop ups, you need to go the Setup area by clicking the Setup icon at the upper part of the main screen.



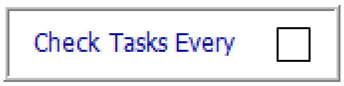
Now you should be in the Setup area.



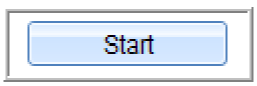
At the bottom left of the Setup area, there is a CHECK TASKS EVERY column with text field where you have to enter the number of minutes you want the software to check your tasks.



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.

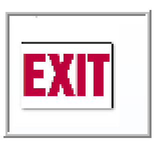


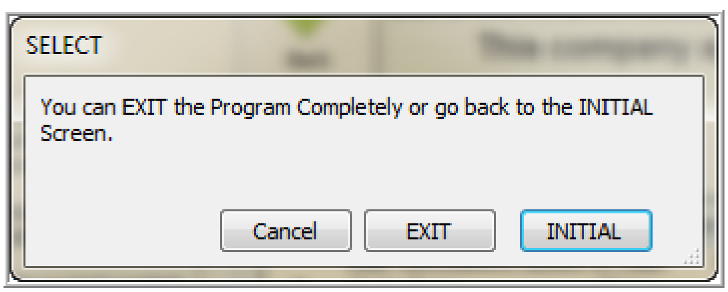
Now once the number of minutes is indicated for the software to check the task, click the Start button.



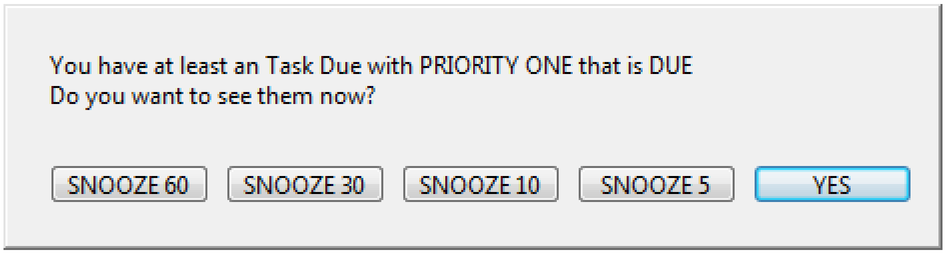
Note that the event will only start in the next login. Meaning, you have to logout from the software first and login again.

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.

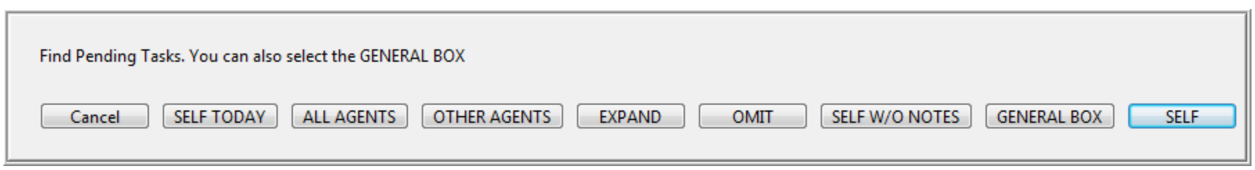


FIND PENDING TASKS

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.



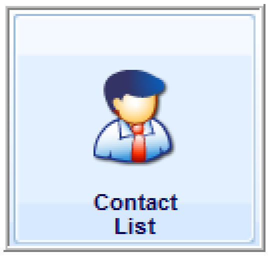
The software will then display all the contacts/prospects with tasks of the agent you selected previously and navigate them using the navigation buttons.

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.

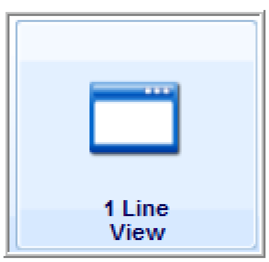
If all the tasks have been created at the same date, it will display by its natural order.

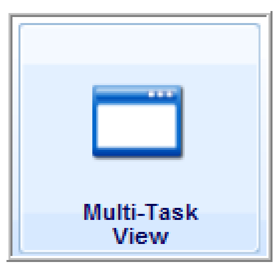
There is also another technique which is to DISPLAY ALL THE FOUND TASKS IN A LIST. To do this, click the Contact List button.



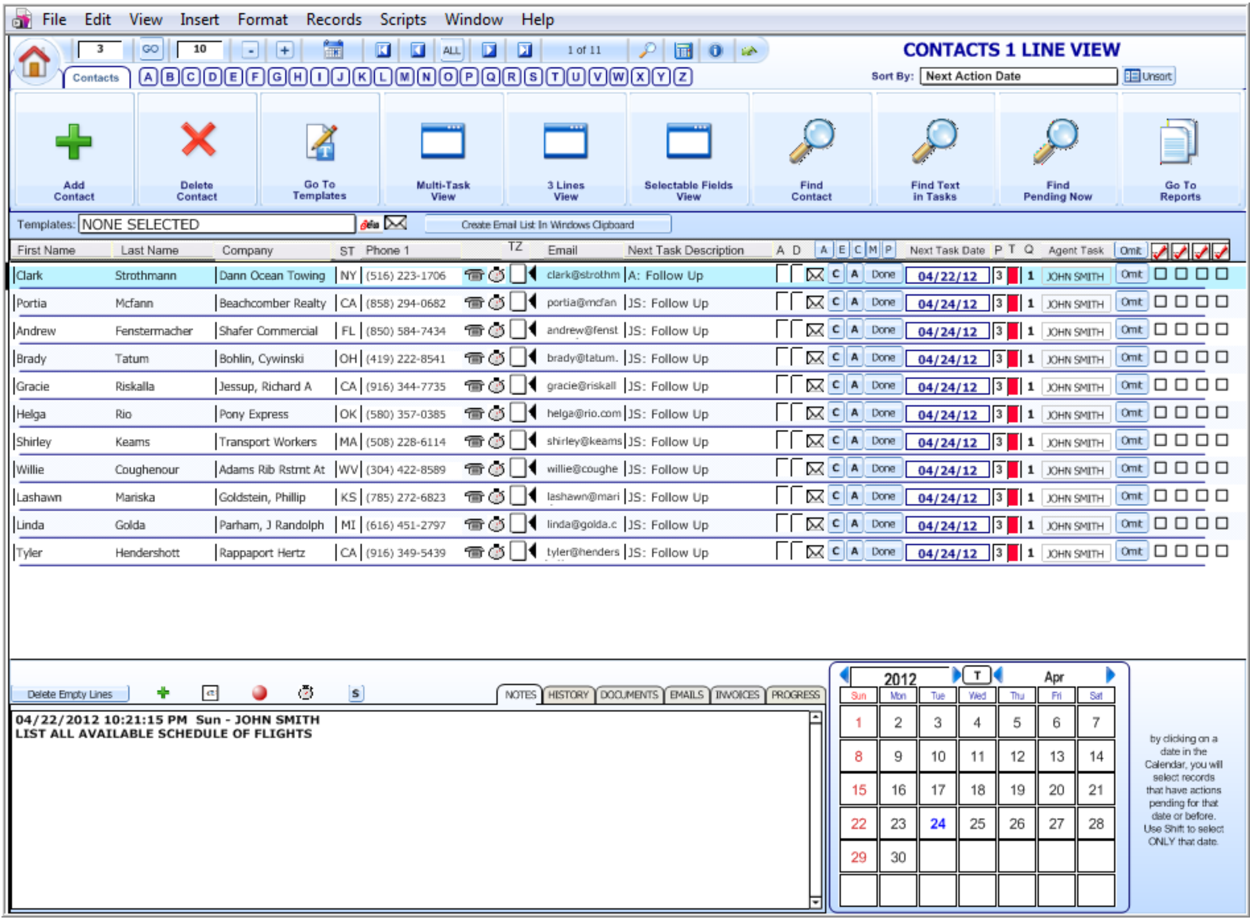
Once you are in the Contact List View screen or the Contacts Selected – Found List screen, click the Multiple List Views button. This will allow you to view the contacts with the pending tasks.

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

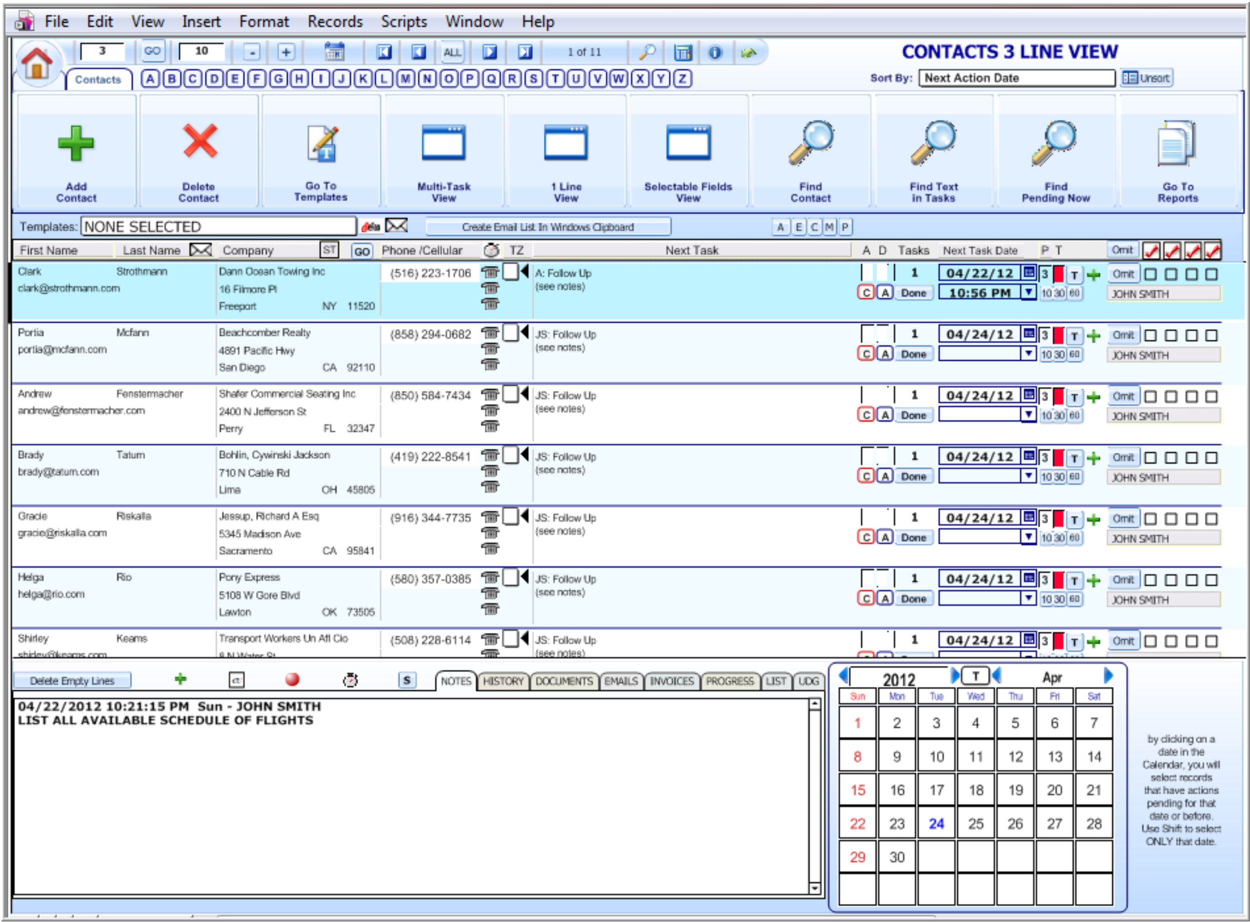




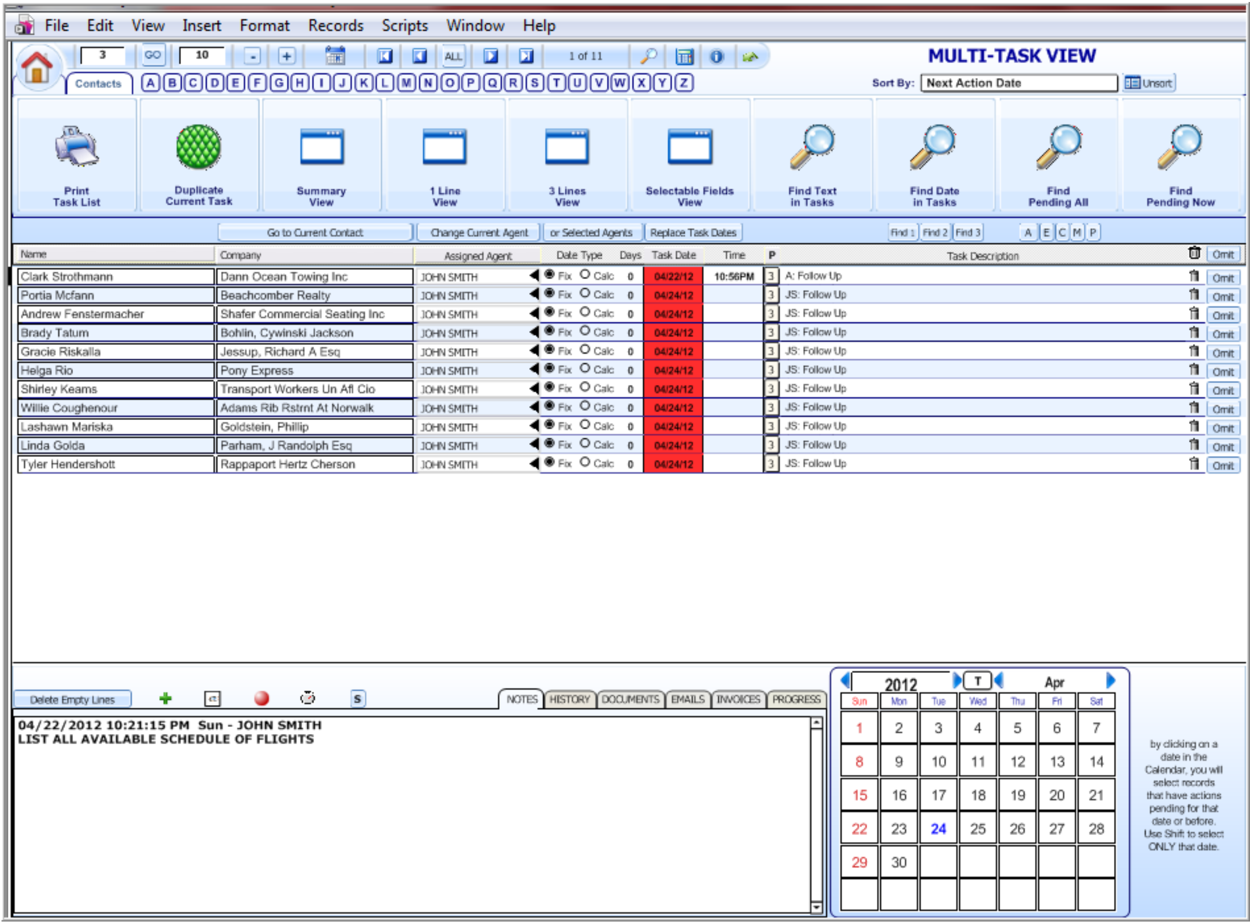
In the 1 Line View, the tasks of the agent are displayed all in one line.



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



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



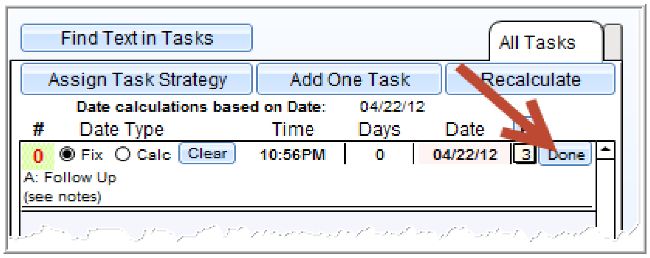
HOW TO DISPOSE TASKS

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.

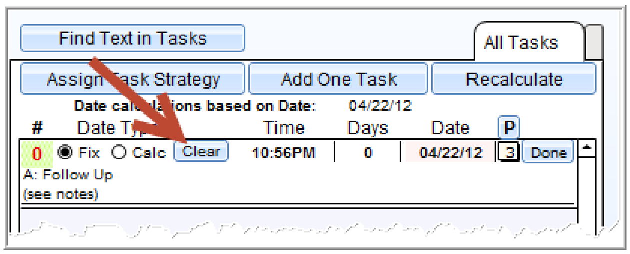
1) By clicking the <u>DONE</u> button of the task that is in the Task Box. Usually, the task contained inside the said task box is the task with the highest priority among the others.

   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 <u>C</u> button of the task that is in the Task Box

or the <u>CLEAR</u> 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.

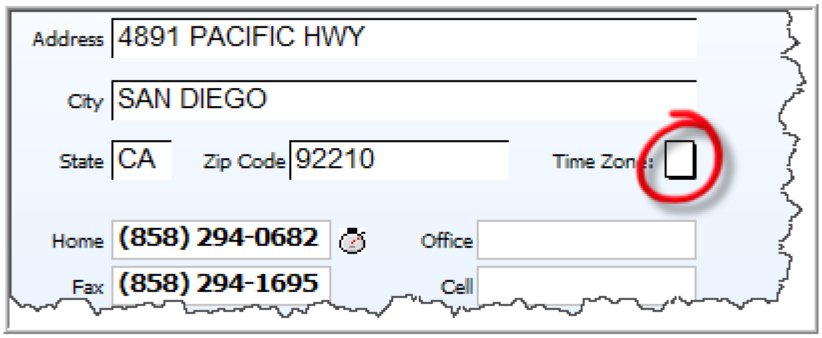
4) By <u>rescheduling</u> the task. This way, it is as if you have created a new task by just overwriting the content of the task with the old one.

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.



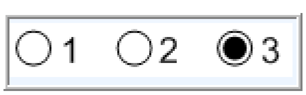
Now to find and select contacts with tasks assigned to an agent based on time zone, just select from the E, C, M, or P buttons

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

2) By the priority number.

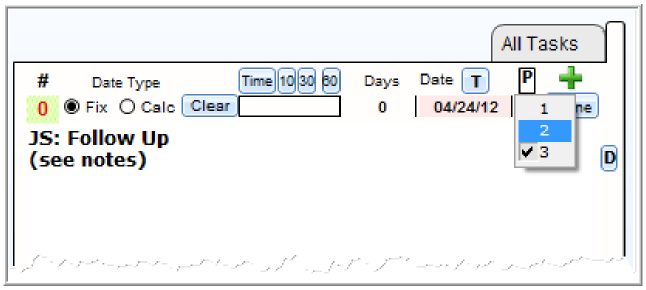
Note that when adding a task, by default, its priority is set to 3. Now to change its priority, you have two ways:

a. By selecting from the radio buttons



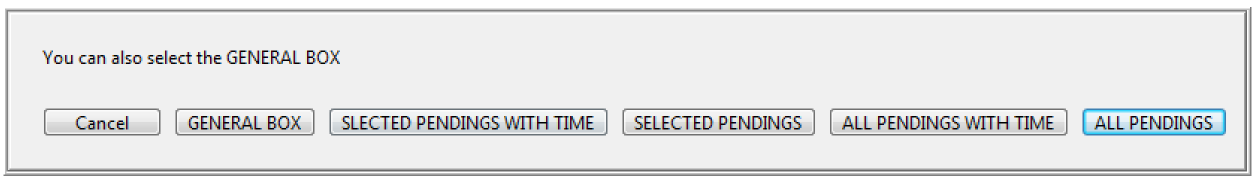
This is the case if you want to change the priority of the task that is in the task box.

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



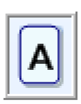
Now to find and select tasks based on their priority, click from the Find 1, Find 2, or Find 3 buttons.

Then select what kind of tasks



ASSIGNING STRATEGY TASKS

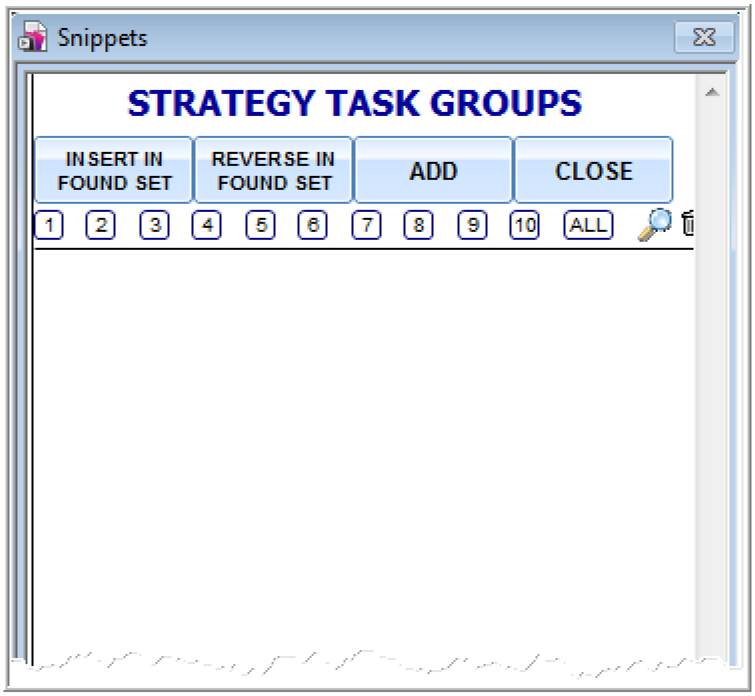
In order to be consistent of assigning tasks for clients; just click on the 'A' button beside the task status label.



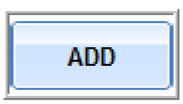
Or the Assign Task Strategy button in the Task Scheduler List

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.

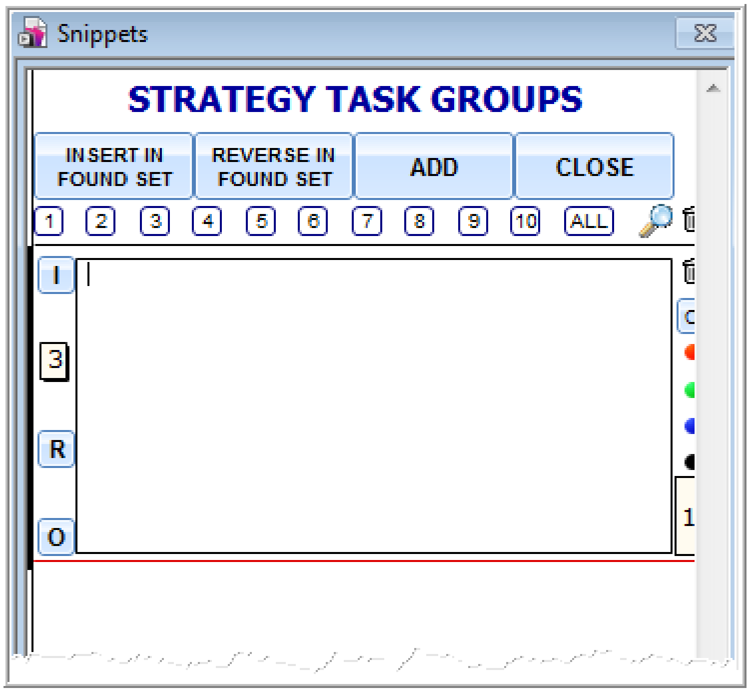


To add strategy tasks, click the Add button.



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.

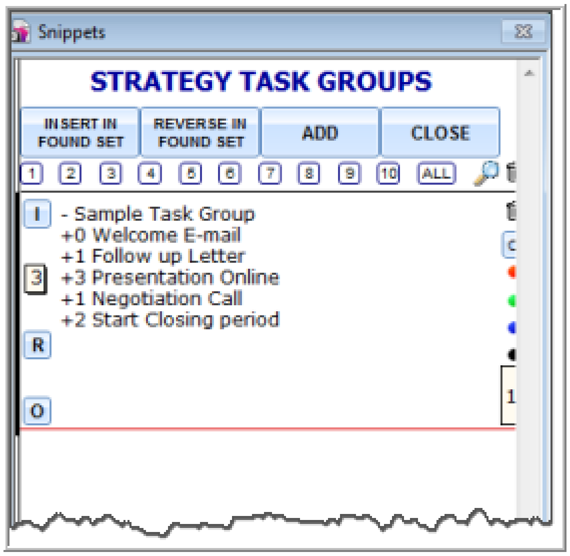
Then, add the strategy tasks in the field that is provided once the Add button is clicked.



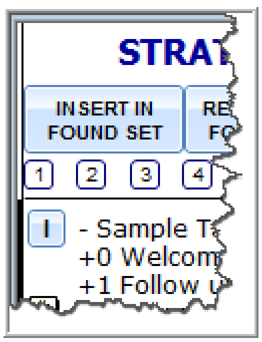
You can enter many ACTIONS in one Snippet or manually one per line for a complete Sales Strategy Cycle in one click.

- 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.

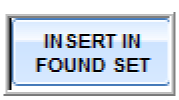
For example, we enter the following strategy tasks:



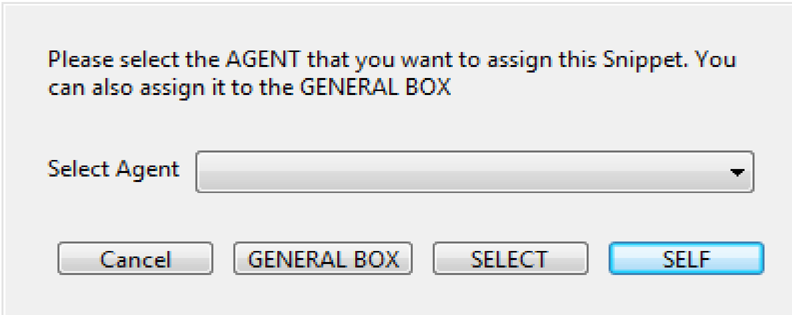
Once the strategy tasks are added, you can then insert them into the Task Manager using the 'I' button of the particular Strategy Task Group.



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.



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