

Mortgage365

Platform Overview



Mortgage365

Azure

Office

Microsoft

Dynamics[®] 365

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83 19	Action Items Today		Loa	ns Need Attention			Co over credit report by Christien Konass on Tue Are for Sand Banks No Description
	14 ₽ New Loans	0 🖻			15 Loans This Mon		v Today (h
	Q Search						Go Over Customer Pret by Chelstine Korace on Mon & Re: Client Wilder- (212) 125-79 No Description
	Loan Number	Topic	Status Reason	Loan Purpose	Rate	Base L	V Max Complete J Call Nov
	20010554	Willard - 910 S Peoria	New Loan	Purchase	4.875	\$160,00	Review FICO findings
	28010558	Jenkins - 910 S Peorl	New Loan	Purchase		\$170,00	No Des
	28010555	Jenkins - 910 S Peorl	New Loan	Purchase		\$170,00	Want Norveran V
	•	Murtaugh - 229 Bridle	New Loan	Purchase	4.625	\$295,00	> Part 7 D My Pipelin
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							Loan Number Topic Rogers - TBO Status Reason New
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HouseCanary 🔁 Zillow

Pricing optimalblue[,]

AUS Fannie Mae Freddie Mac



Features You & Your Borrowers Will Love

bson - TBD - Ra	te 4.37%		Loan Purchase	Purpose e •	Loan S New I		Loan Number 27004278		Origination Lead	Owner Christine Kor
1st + 2nd S Leen Type Conv Bear Laren 3250,000.00 Come Ty 25.00% Rare 4.370% Leen Tarm 30 yr Hensen Cony Insurance Only Loan Program Payment Payment Incomme	Troi Law S250,000 Grave 3 \$175,000.00 Price Americation Fixed Rate	Pay	2nd Liner, Type Conv Kate Loan S297,500,00 Drawn % 30,00% Kiner 5.375% Loan Them 25 yr wrearen Only No Proponds Insurance Only Laan Program BB&T - Conforming ment Income & A			+ 2nd Laon Type VA Week Low S318,750.00 Comm h 25.00% Mare 4.750% Laon Threm 25.97 Mo Proposed BB&T - FHA 25 Yr FID BB&T - FHA 25 Yr FID Income & A	red		Laan Type Conv Base Laan \$318,750.00	y 25 Yr Fixed 🗙
Ins. \$150.00	Total 1,797.48 re: 4.3205		1000 1000 1000 1000 1000 1000 1000 100	0.00 Debts \$200.00	FETT	12 12 2005 101 12 2005 102 12 12 12 12 12 12 12 12 12 12 12 12 12	HOA \$400.00 HI ent L31 \$154.06	1211		Mortgage365 4.675% 2.25 vr. More the second seco
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Our Mortgage365 applications combine with MortgageOS to unlock the full power and potential of the Microsoft Cloud and Platform Technologies for lenders looking to create BETTER, SMARTER, FASTER loan experiences.

Our community today enjoys real-time pricing, credit, loan and AUS data and features in their Outlook, Dynamics CRM and mobile apps.



Fully Loaded CRM Mobile App





Cloud Aware MortgageOS Includes:

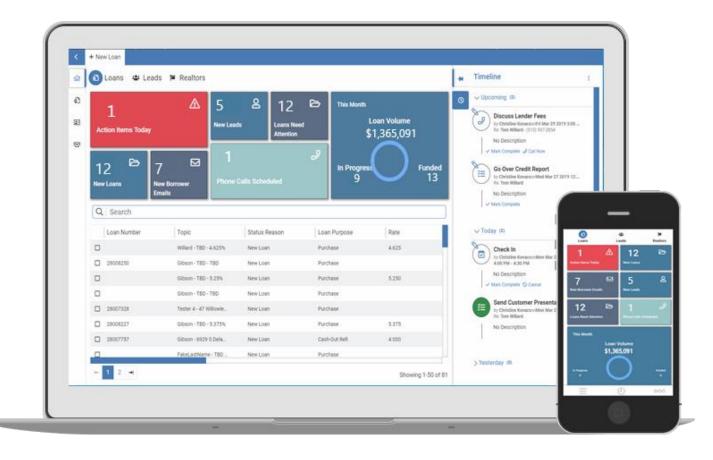
- ✓ Lead Management
- ✓ Marketing Automation
- ✓ Live Pricing
- ✓ Credit
- ✓ AUS, Fees, Valuation
- ✓ Bi-Directional LOS

M365 License Provides:

- ✓ Mortgage365 Desktop
- ✓ Outlook App
- ✓ iOS App
- ✓ Android App



Lead & Pipeline Management







Top of Funnel

- Fully Integrated Lead Providers
- ✓ Fully Integrated Five9 Dialer
- Automated Lead Marketing
- ✓ Distribution
- ✓ Prioritization
- ✓ Campaign Management
- ✓ Activity Center Intelligent Alerts & Lists

Mid Funnel

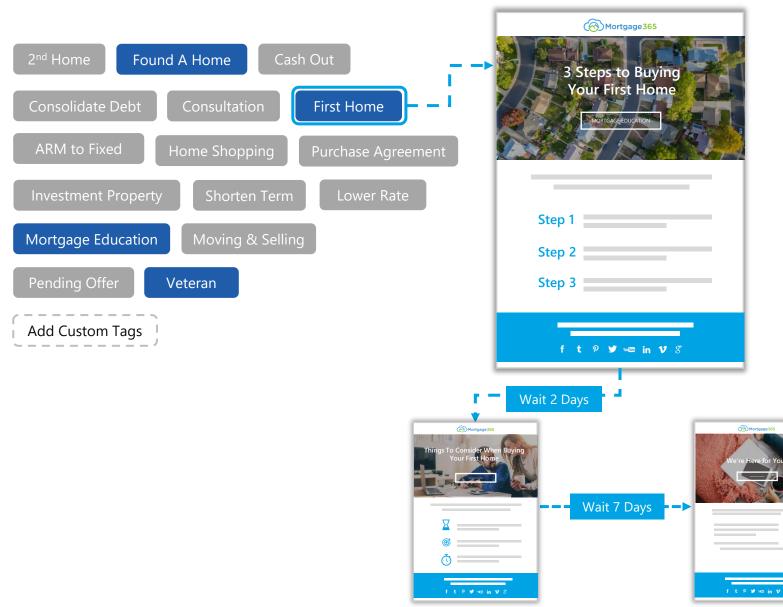
- ✓ Loan Scenario Presentation
- ✓ LOS Loan Pipeline
- ✓ Automated In Process Marketing
- ✓ Realtor Lists

Bottom of Funnel

- Automated Post Close Marketing
- ✓ Portfolio Retention Campaigns
- ✓ Trigger Alerts



Automated Marketing – Why Cloud





Our Why Cloud ties marketing and sales together; by allowing users to quickly select what the Borrower's motivations, specific needs and persona are.

This allows highly targeted and personal email to be sent.

The LOS statuses are mapped to specific Marketing Events which enables the right message to be sent at the right time.

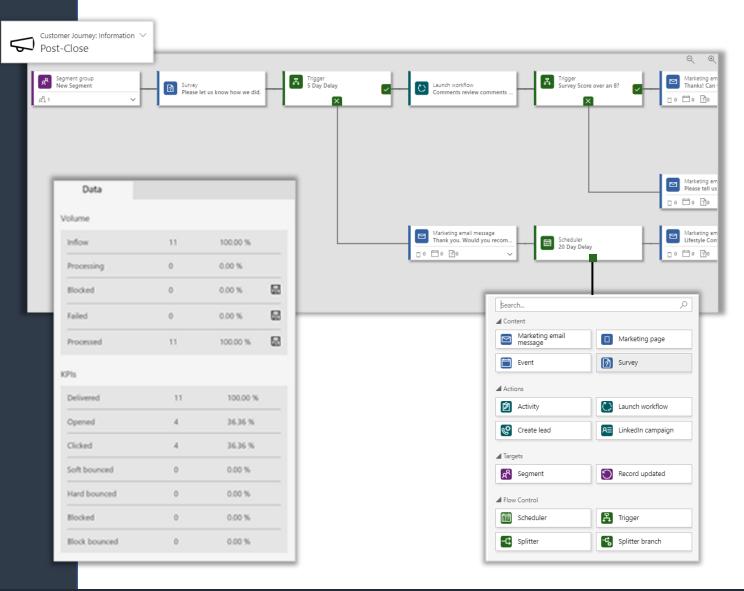


Omni Channel Communication	Customizable Email Templates	Landing Pages & Forms	Reusable Content & Marketing Cale		
Full Lifecyo Marketing Microsoft	Designer	360-Degree View	Behavior-Based Lead Nurture	In Process & Post Close Campaigns	
Dynamics 365 For Marketing	Embedded Intelligence	Multiple Lead Scoring Grades	Interactions Insights	Social Insights	
Feature Summary Smart Marketing	Persona-Driven Campaigns	Advanced Suppression I	Intelligent ogic Segmentation	Loan Data Driven Journeys	
Reporting	Dashboards & Insights	Surveys	Advanced Analytics via Power Bl	Easy to Use & Extend	

Built-in Mortgage Campaigns

Mortgage365 includes email templates, segments and customer journeys to support the following mortgage-specific campaigns:

- Nurture Campaign
- Pre-Qual Campaign
- Loan In Process Campaign
- Post-Close Campaign





Marketing Portals

Mortgage 365	Fill out your i	Information below.								
	Fill out your information below.									
Get into your new home!	First Name*	Last Name*	(The second seco							
	Email*	Landi								
	Email									
✓ Start your pre-approval today	Mobile Phone*									
✓ Low rates and fees										
√ Direct Lender	Loan Purpose		Fill out your information below. First Name*							
√ Easy Application	Purchase		Email*							
✓ Lock in a rate Immediately			Email							
√ Close in 30 Days or Less	SUBMIT	CLEAR	Molis Phone*							
			SUBMIT CLEAR							
			SUBMIT CLEAK							
	Susan Loan Officer									
	OSUSAI LoanOfficer H you or anyone you know is lookin to purchase or entireance a home, I'd appreciated the opportunity to work with you.									



- Easily recreate landing pages and forms to post on external sites
- Use code-snippets from existing landing pages to bring data straight into Mortgage365
- Use portals to deploy web-facing landing pages on your websites
 - Loan Officer portals
 - Realtor portals
 - Company portals
- Portal technology uses a modern interface built on CSS3, HTML5, and Bootstrap.



Lead Scoring and AI Intelligent Customer Engagement

	🛱 Active	events ~				[Search for red	cords P	
	August 20 Sunday	019 Monday	Tuesday	Wednesday	Today Age	nda Day Friday	Week Mor Satur	-	
	28	29	30	31	Aug 1	2	3		
	4	5 12:00am Pink event	6	7	8	9	10		
	11	12 12:00am Standard event		14 12:00am Purple event	15	16	17		
_	18		20 12:00am Red event	21	22	23	24		
_	25	26	27	28	29	30	31		

Spam Score: Craft messages that generate a low spam score to improve email deliverability and credibility.

Smart Scheduler: Let the AI tell you specifically and generally the best times to send content to borrowers to raise your open rate.

Segment Booster: Watch the AI pull in 'best contacts' from a current segment and add them to a running customer journey to boost subscription rates and customer interaction.



