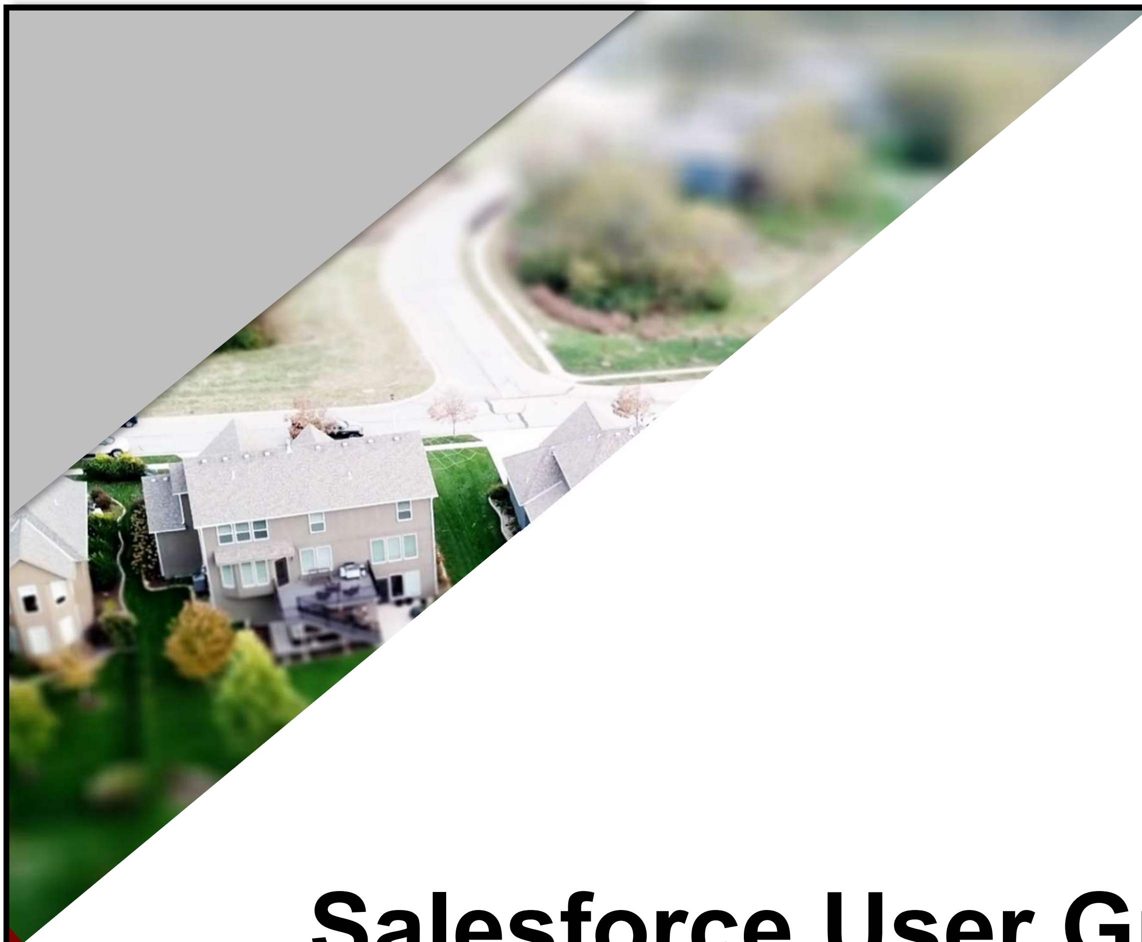

Salesforce User Guide

Account Executive - Sales

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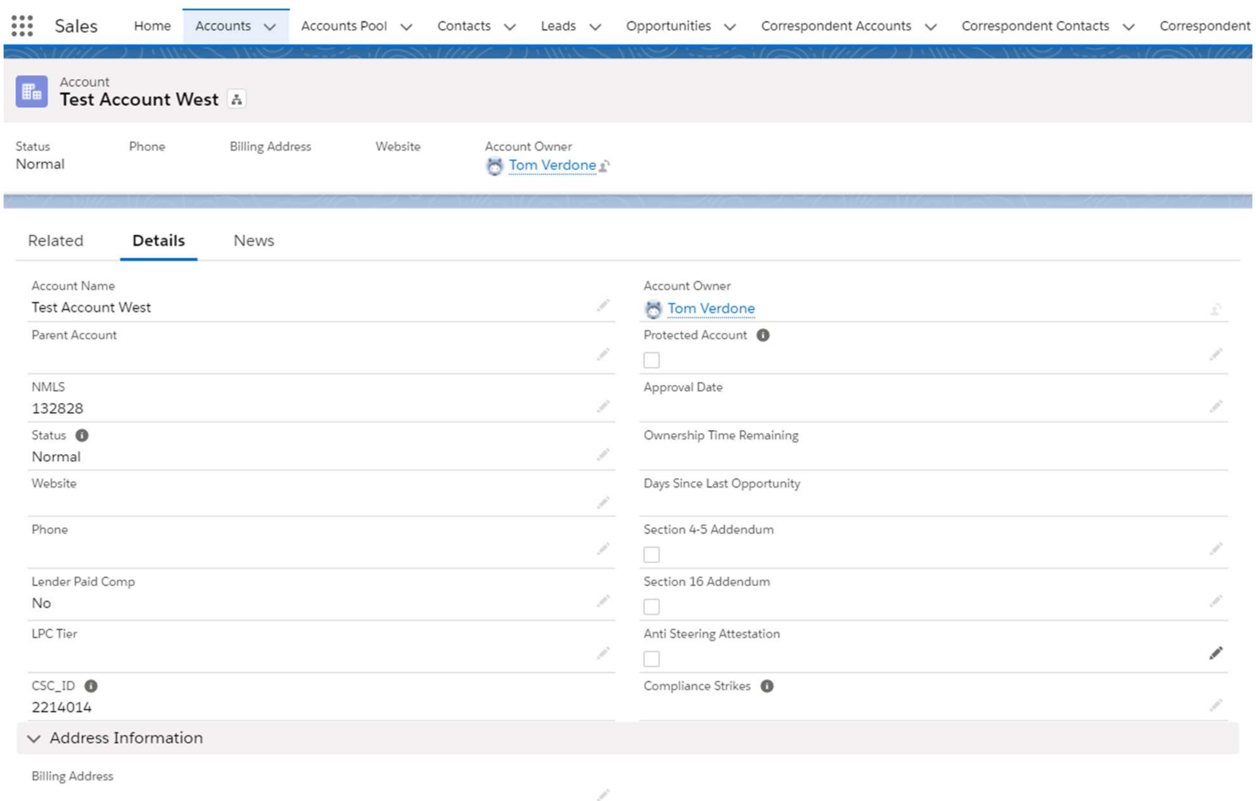
LEARNING&DEVELOPMENT

Accounts

Overview:

An Account in Salesforce is created for each Broker Company or Branch Location and houses details and related pages. Accounts are created by the Vendor Manager when a Broker Application Package is signed and approved. Only one Account Executive may be assigned to an Account at any time. Some Accounts in Salesforce are unowned (Owner = Available Broker) and may be contacted by any Account Executive to obtain ownership. Accounts are only visible to the Account Executive that is assigned and the Account Executive's Manager.



Fields:

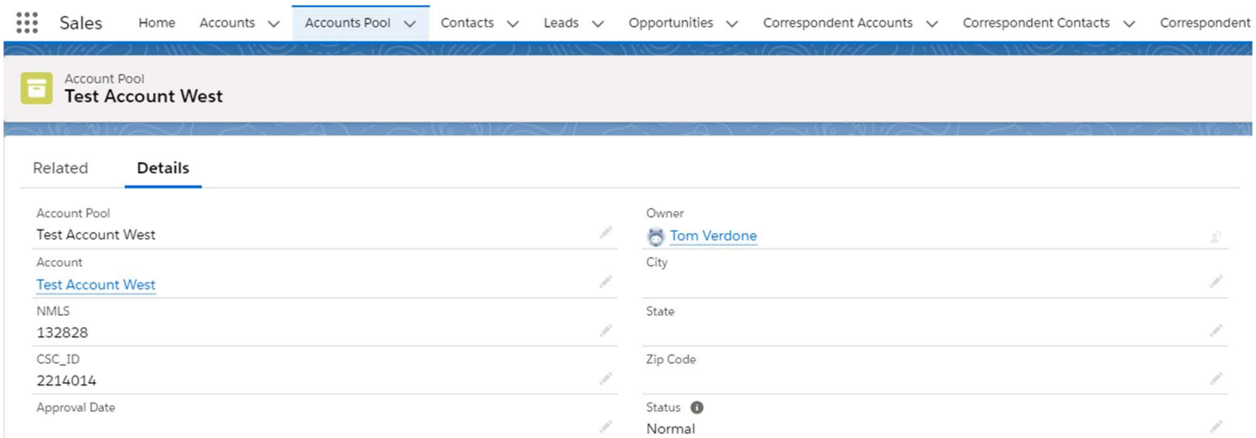
Account Name: Name of Broker Company
Account Owner: Account Executive assigned
Parent Account: Name of Parent Account if Account is a branch location
Protected Account: Checkbox to exclude from automatic ownership transfers
NMLS: NMLS ID
Approval Date: Date Broker or Branch was originally approved
Status: Current status of Account
Ownership Time Remaining: Days until system moves Account into available status
Website: Broker or Branch website
Phone Number: Broker or Branch Phone Number

Section 4-5 addendum: Broker Application Package information
Section 16 addendum: Broker Application Package information
Anti-Steering Attestation: Broker Application Package information
Lender Paid Compensation: Whether Broker/Branch is eligible for Lender Paid Compensation
LPC Tier: Lender Paid Compensation Tier which must be used by Broker/Branch
CSC ID: Unique Identifier
Compliance Strikes: Number of compliance findings associated with Broker/Branch
Address: Broker/Branch Address

Account Pool

Overview:

An Account Pool entry is automatically created and associated with every Account. The Account Pool page is designed to show limited account information to all Account Executives regardless of ownership. Before sending a Broker Application Package to a prospective Broker the Account Executive is required to check the Account Pool to confirm an entry does not already exist.



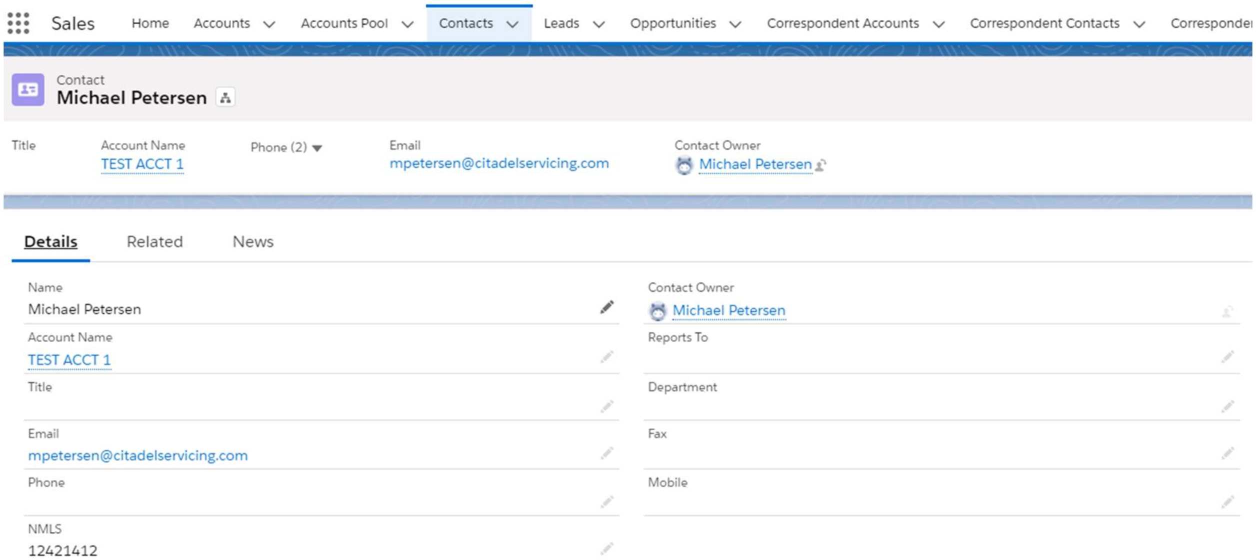
Fields:

Account Pool: Name of Broker/Branch
Account: Name of Broker/Branch
Owner: Account Executive assigned to Broker/Branch
NMLS: NMLS ID
CSC ID: Unique Identifier
Approval Date: Date Broker/Branch was approved
Address: City, State, Zip of Broker/Branch
Status: Current status of Broker/Branch

Contacts

Overview:

A contact is an individual associated with a Broker Company or Branch Account. Account Executives are responsible for creating and maintaining the contact list for the Accounts they own. Calls and Emails to contacts are tracked and will be detailed below.



Fields:

Account Name: Account the Contact is associated with
Title: Contact's Job Title
Name: Contact's Name
Email: Contact's Email
Phone: Contact's Phone Number
NMLS: Contact's Personal NMLS ID (If applicable, if not leave blank)
Owner: Owner of the Contact Record
Reports To: Contact's Manager (if applicable and entered in SalesForce as a contact)
Department: Contact's Department
Fax: Contact's Fax Number
Mobile: Contact's Mobile Number
Address: Contact's Address

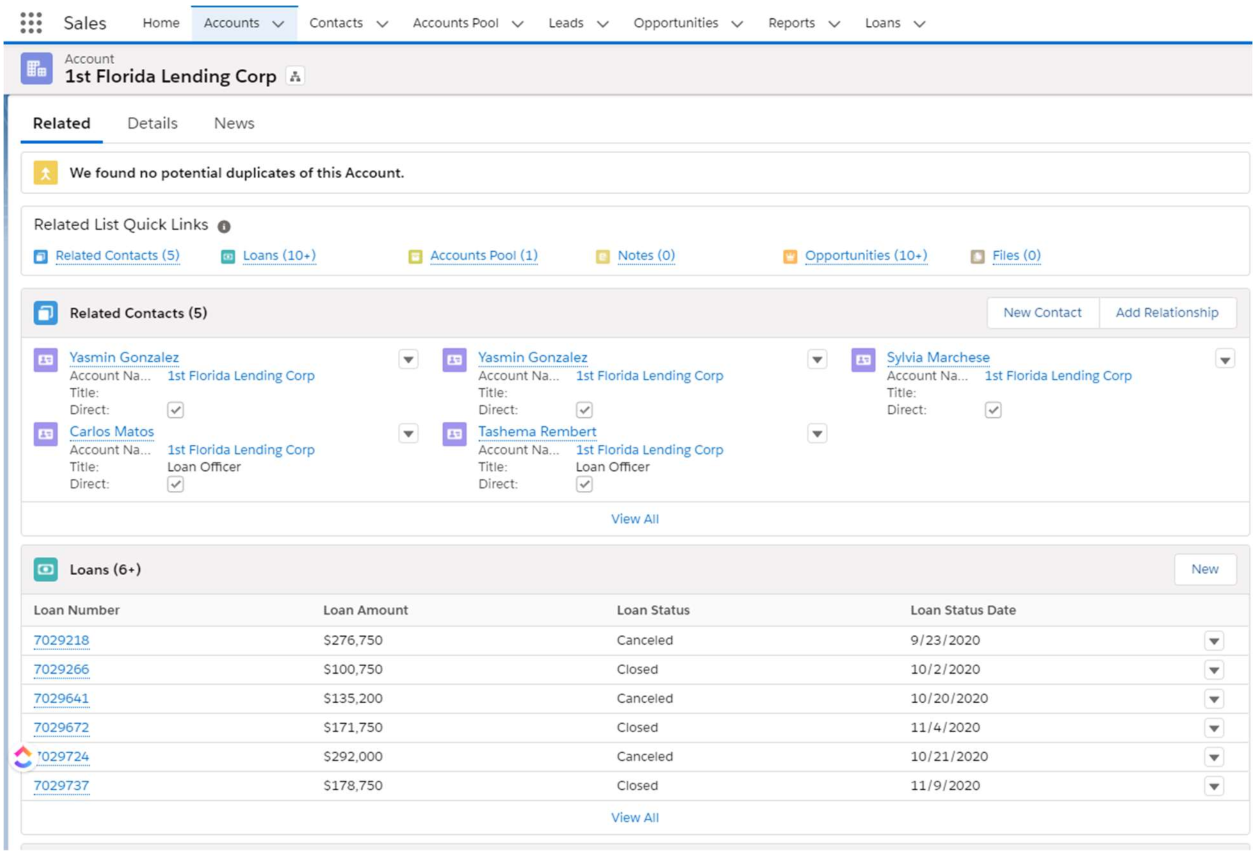
Guide:

1. To create a new contact, from the associated Account navigate to the Related tab. Under the Related Contacts section click the New Contact Button.
2. Fill the appropriate information into the fields on the New Contact screen which pops up.
3. Click the Save button to complete the Contact Creation Process
4. If entering more than one new Contact at a time click the Save and New button instead to bring up the next New Contact screen.

Loans

Overview:

Loans in Salesforce are automatically created to show transactions associated with the Broker Account/Branch. Limited information is displayed and is meant to be used as a quick reference for communicating loan status.



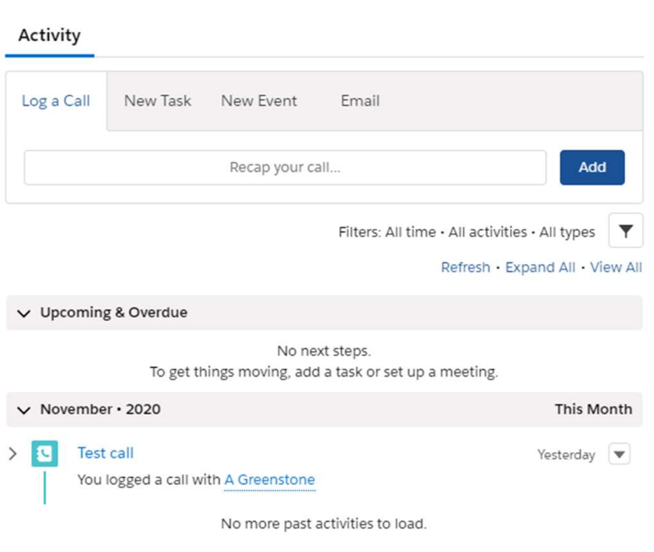
Fields:

Loan Number: Loan number from LOS
Loan Amount: Dollar Amount of the Loan
Loan Status: Status of the loan from LOS
Loan Status Date: Date of last status change

Activities

Overview:

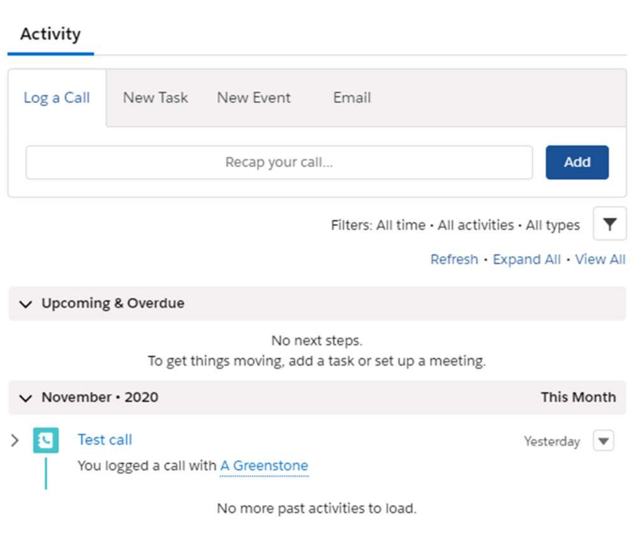
The Activities panel is available on the Account Page and Contact Page. Activities are comprised of calls, emails, tasks, and events. This panel is used to log and track communication from the Account Executive. Any activity logged on a Contact Page will be displayed in the activity history of the related Account Page. SalesForce should be integrated with Microsoft Outlook (refer to SalesForce Integration Setup Guide). Account Executives are responsible for logging all calls and emails.



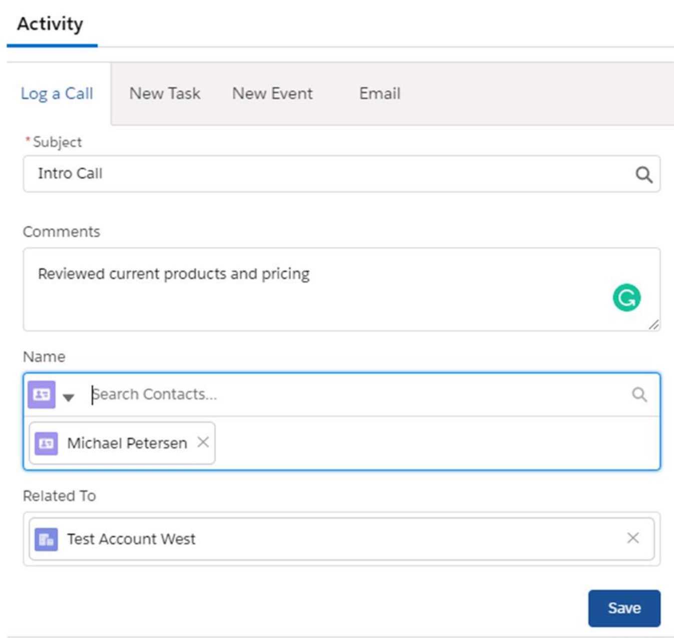
Guide:

Logging a Call:

1. From the Contact Page, under the Activity Section, under the Log a Call Section click the Add Button.



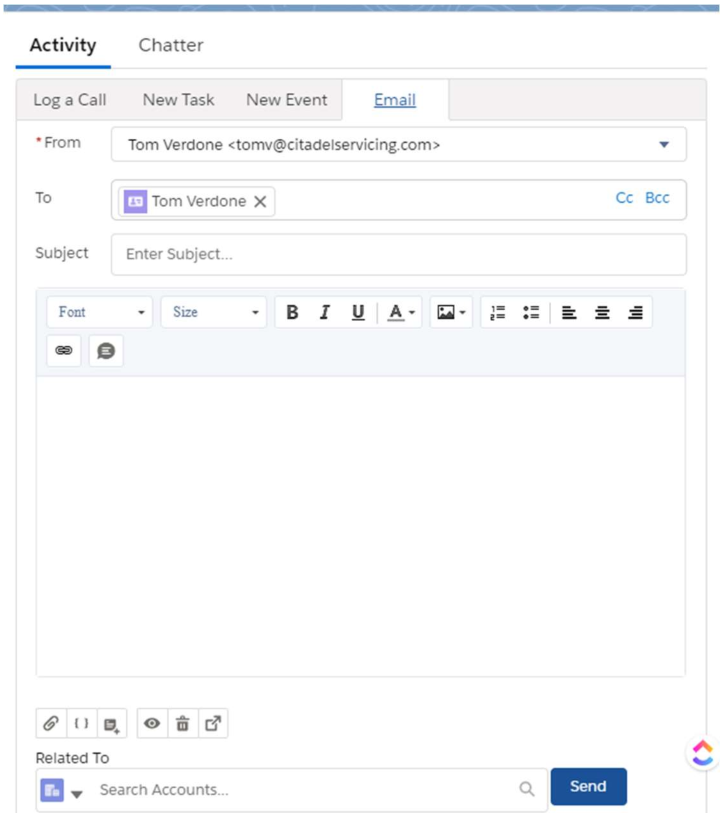
2. In the Subject Box type the subject of the conversation
3. In the Comments Box type all relevant information from the call.
4. In the Name Box confirm the name of the contact and add any others if applicable.
5. In the Related To Box enter any additional accounts to relate the phone call to if applicable. (Normally not applicable)



6. When complete click the Save Button.

Sending an Email from SalesForce:

1. From the Contact Page, under the Activity Section, under the Email Section a blank email template will be available.
2. In the From Box confirm that your email is entered.
3. In the To Box confirm the email address of the Contact and add any others if applicable.
    a. CC is available if necessary
4. In the Subject Box type the subject of the email.
5. In the Body Box type the message of the email.
6. In the Related To Box confirm the associated Account is selected.



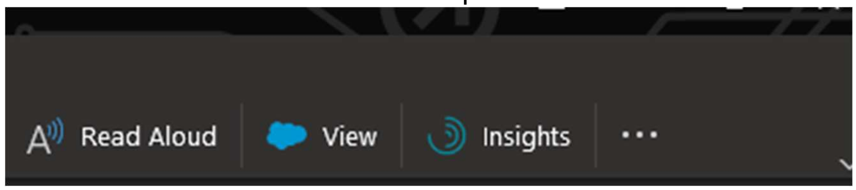
7. When complete click the Send Button.

Logging an Email from Microsoft Outlook (optional feature):

This requires an Outlook Add-In to be enabled (refer to SalesForce Integration Setup Guide)

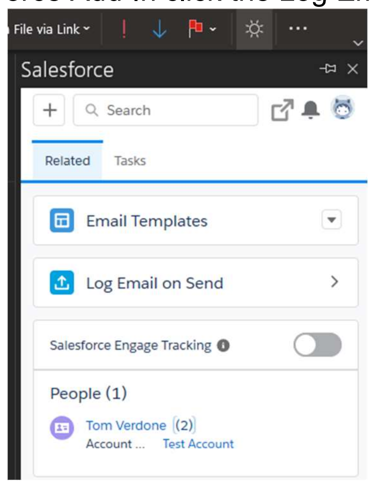
1. In Microsoft Outlook click the New Email button, Reply Button, or Reply All Button (as applicable).
2. In the Untitled – Message window that appears click the View Button with the blue SalesForce cloud icon.

1. If this icon is not visible click the button with three dots in a horizontal line and select from the dropdown menu.



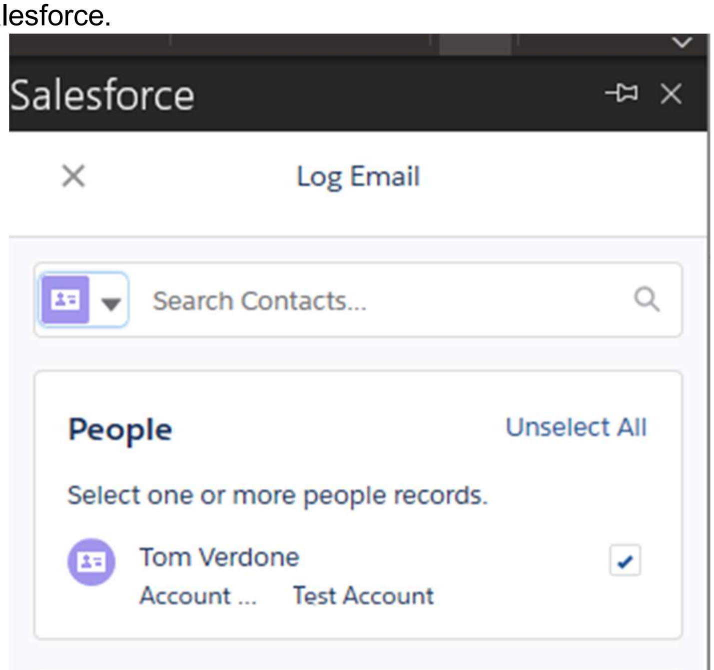
2Compose the new email using the normal Microsoft Outlook process.

3. When ready to send in the SalesForce Add-In click the Log Email on Send button



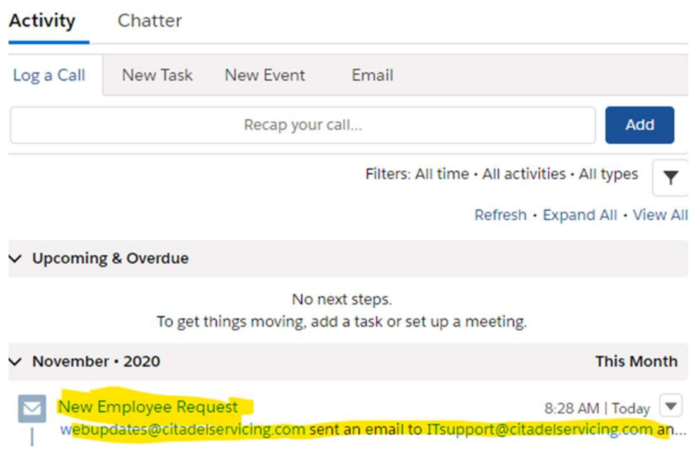
Confirm all SalesForce Contacts are selected in the People Section which appears.

1. If an email recipient does not appear, confirm they have been created as a contact in Salesforce.



2. Click the Save Button
3. This will cause an email address to be added to the BCC box.

3. Send email using normal Microsoft Outlook process.
4. Logging can be confirmed by navigating to the specific Contact page in SalesForce.



Account Administration

Account Transfers

For Account Transfer requests email Brokers@citadelservicing.com and specify the Account requested.

Protecting Accounts

An Account executive may protect a number of accounts as decided by the National Sales Manager. Protecting an account will exclude the account from all automatic ownership transfers.

To protect an Account click the Protected Account Checkbox on the Account Page.