



# Velocity CRM


RETAIL LOAN  
OFFICER

  
**Acra**  
LENDING  


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LEARNING & DEVELOPMENT





## Sign In



- Faster Response
- More Calls
- More Revenue

[Learn More](#)


Sign In

User Name:

Password:

[Forgot Password?](#)

Your log in will be provided by e-mail in separate email. After selecting Sign-n you will go to the next page.



DASHBOARDLEADS

Priority View

Normal View

Pull Leads ▼

Select **Priority View** as this will have all of new leads that came into queue.  
**Pull Leads** has all of the leads that have not been assigned.



Action:	Called: Contacted/Call Back ▾	Add Action
Comment:	<div></div> * Required	

When selecting the **Action Box**, the drop-down list is to the right. You will choose one of these.

-- Select --  
-- Select --  
Called: Contacted/Call Back  
Called: No Contact  
Called: Left Message  
Pitched Loan  
Submit for Pre-Qualification  
Application Taken  
Does Not Qualify  
Not Interested  
Bad Phone Number  
Bad Lead: Return to Vendor  
General Comment

Once the **Action** has been selected, you will be directed to this screen listed below.

Action:	Called: Contacted/Call Back ▾	Add Action	<a href="#">Hide Calendar Event</a>
Comment:	<div></div> * Required		
<b>Add Calendar Event</b>			
Event Type:	<input checked="" type="radio"/> Task <input type="radio"/> Appointment		
Title:	<div></div>		
Description:	<div></div>		
Date/Time:	<input type="radio"/> 15 minutes ▾ from now <input checked="" type="radio"/> 11/14/2020 10:04 AM		
Alert Me By:	<input checked="" type="checkbox"/> Popup <input type="checkbox"/> Email <input type="checkbox"/> Text (SMS) 0 minutes ▾ before start Date/Time		
Scheduled Dial:	<input type="checkbox"/> Call Me At: (949) 386-0383 (Mobile Phone) ▾ <input type="checkbox"/> Call Lead At: (470) 737-7635 (Day Phone) ▾		
Other:	<input type="checkbox"/> Create Outlook Calendar Reminder <input type="checkbox"/> Dismiss upon Status Change		
Notify Lead:	<input type="checkbox"/> SMS Reminder 15 minutes ▾ before start Date/Time <span style="color: red;">Please go to Client Settings, SMS Settings tab, and set a Reminder Message before selecting an SMS reminder.</span>		
			Add Calendar Event

Below is the **Lead Activity** information that is completed to follow up with the client. Complete the **Add Calendar Event** information for it to create the follow-up reminder.

**Tony Zangrilli**  
Date Added: 12/17/2020 1:02 PM

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**Lead Activity**

Lead Source: Cix \*      Status: New \*      User: Singh, Jas

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Action: Called: Contacted/Call Back    Add Action

Comment:  \* Required

**Add Calendar Event**

Event Type: ☒ Task    ☐ Appointment

Title:

Description:

Date/Time: ☐ 15 minutes    from now    ☒ 12/17/2020 2:39 PM

Alert Me By: ☒ Popup    ☐ Email    ☐ Text (SMS)    0 minutes    before start Date/Time

Scheduled Dial: ☐ Call Me At: (949) 386-0383 (Mobile Phone)    ☐ Call Lead At: (239) 572-2676 (Evening Phone)

Other: ☐ Create Outlook Calendar Reminder    ☐ Dismiss upon Status Change

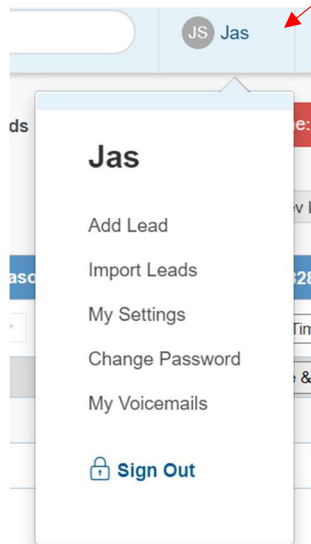
Notify Lead: ☐ SMS Reminder    15 minutes    before start Date/Time    *Please go to Client Settings, SMS Settings tab, and set a Reminder Message before selecting an SMS reminder.*

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**History**

☒ Actions Only    ☐ Logs Only    ☐ Actions & Logs    ☐ Calendar Events    ☐ Integrations    ☐ Duplicate Leads    ☐ SMS

Entry	Comment	User
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The click on the **User** and your name to the Lead

In the **Lead Activity** field, select the source when inputting the lead.

Lead Activity

Lead Source:

CSC Web Lead Retail Pages

▼\*

Complete by selecting the Borrowers information to update the Lead.

Lead Data

Lead Information

Borrower Profile

Summary

Borrower(s) Information

Property Information

Loan Information

Finances

Payment Calculator

Funding

Miscellaneous Information

Borrower Basics

First Name (from Summary):

Tyheema

Middle Name:

Last Name (from Summary):

Mason

Day Phone (from Summary):

(470) 737-7635

Evening Phone (from Summary):

Mobile Phone (from Summary):

Email (from Summary):

treasureofgod360@outlook.com

Address:

City:

State:

GA

▼

Zip Code:

County:

Primary Contact: