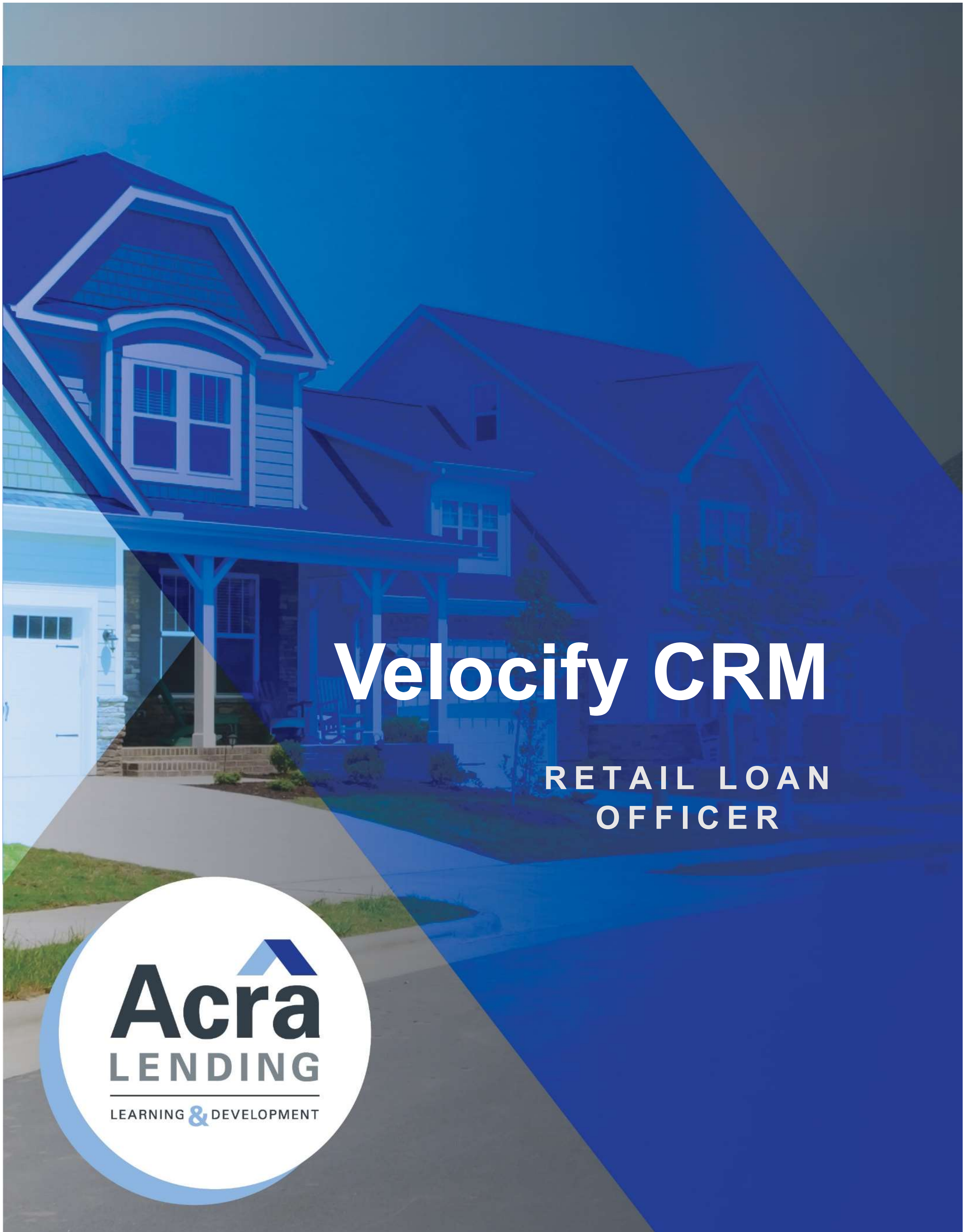
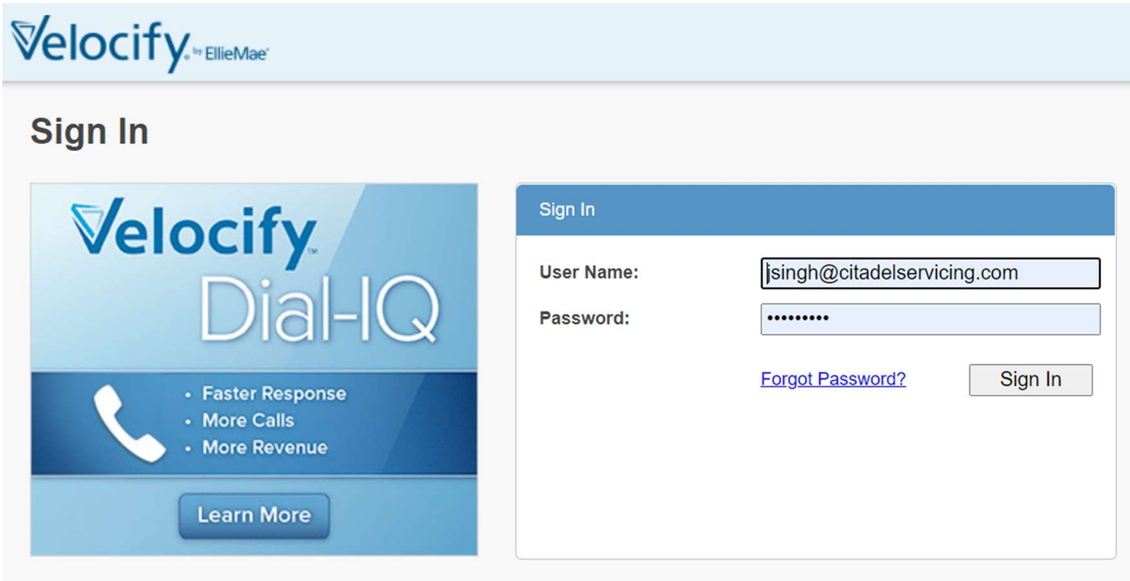


Velocify CRM

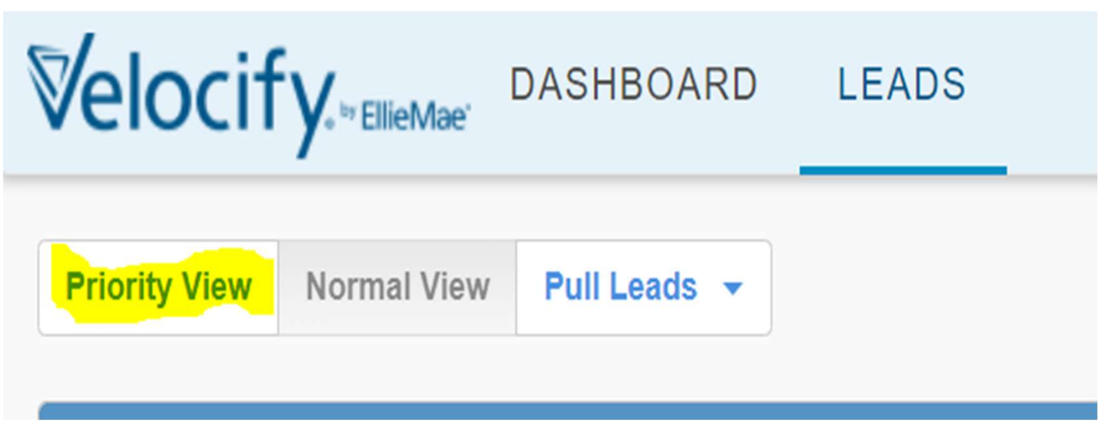
RETAIL LOAN OFFICER

Acra LENDING

LEARNING & DEVELOPMENT

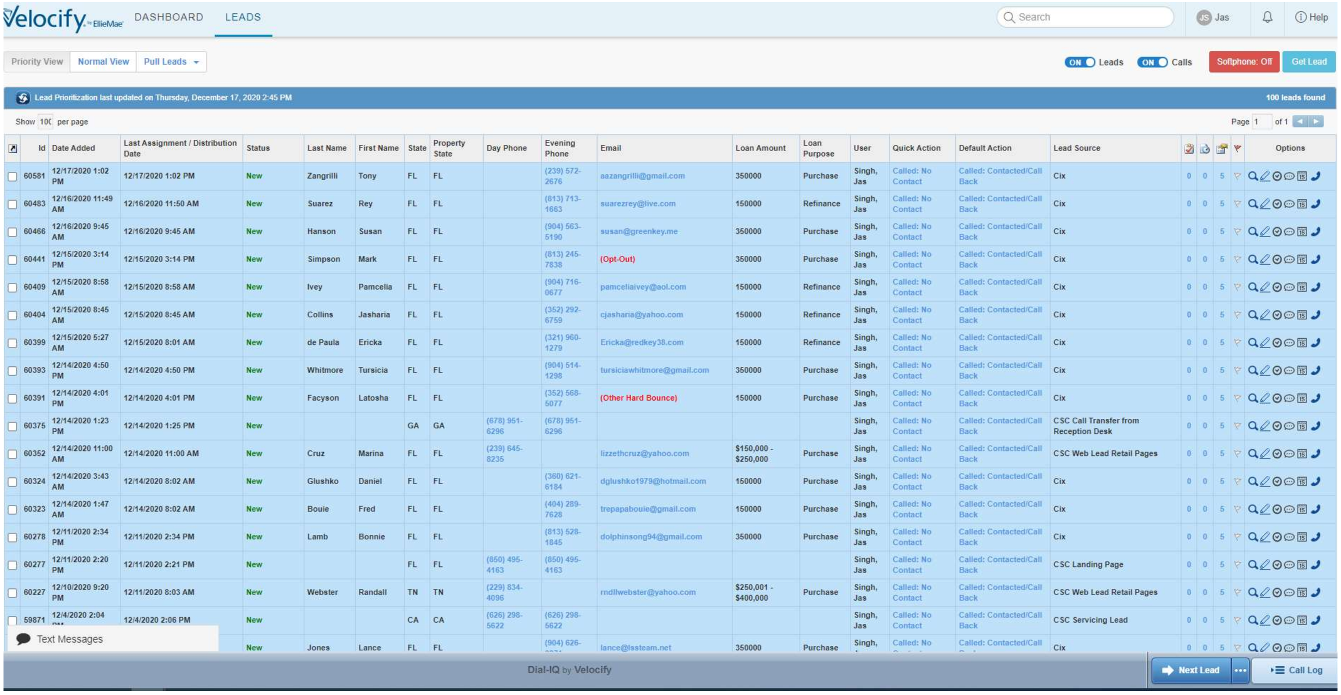


Your log in will be provided by e-mail in separate email. After selecting Sign-n you will go to the next page.



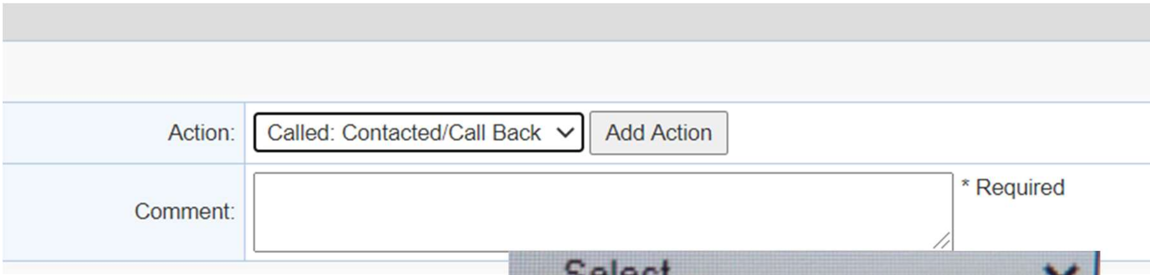
Select **Priority View** as this will have all of new leads that came into queue.

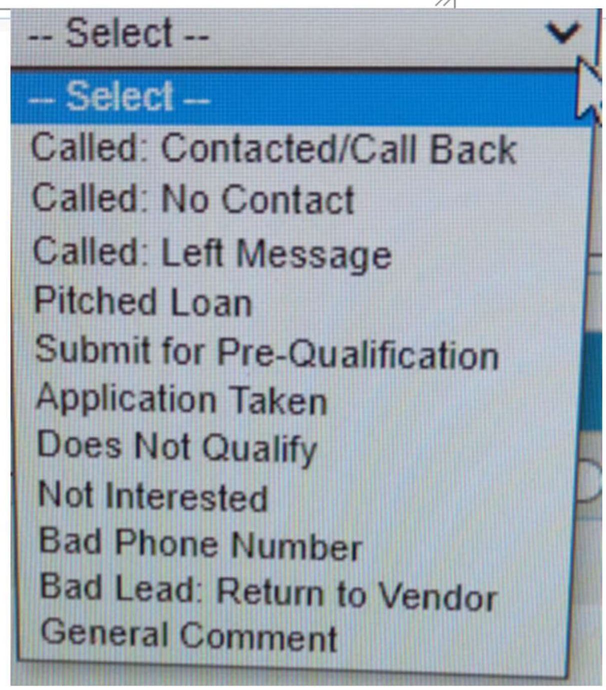
Pull Leads has all of the leads that have not been assigned.



Above is an example of the **Priority View** page. The Lead Source will show you all the different ways they came in to the LO. CIX is another company we buy leads from.

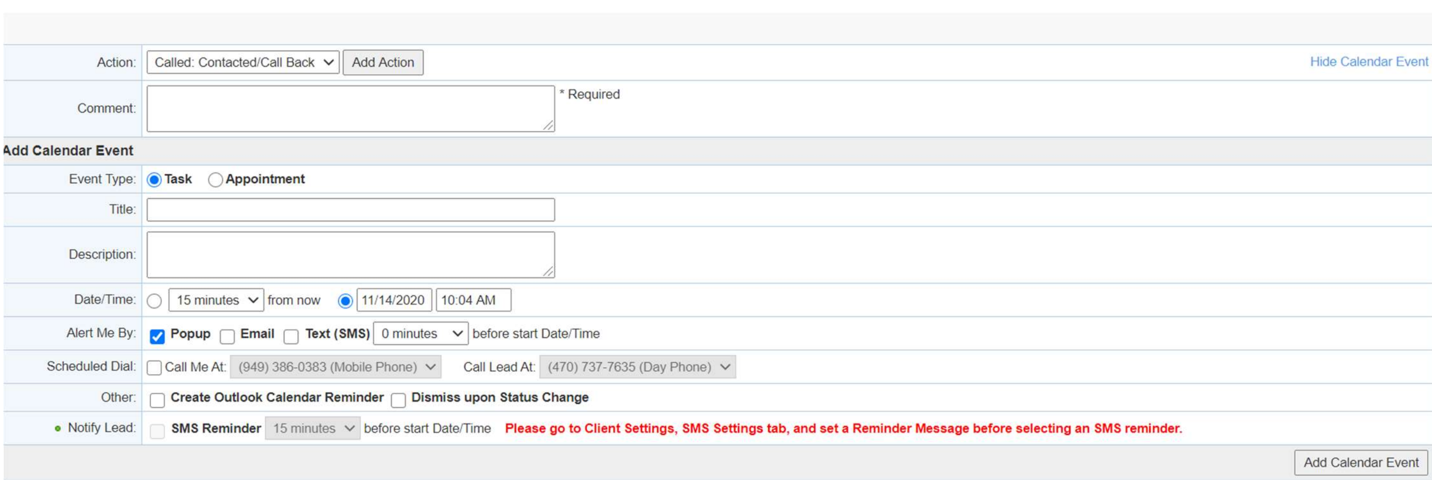
Once the lead has been selected – under **Options** select the "**Pencil**" and Click on it.



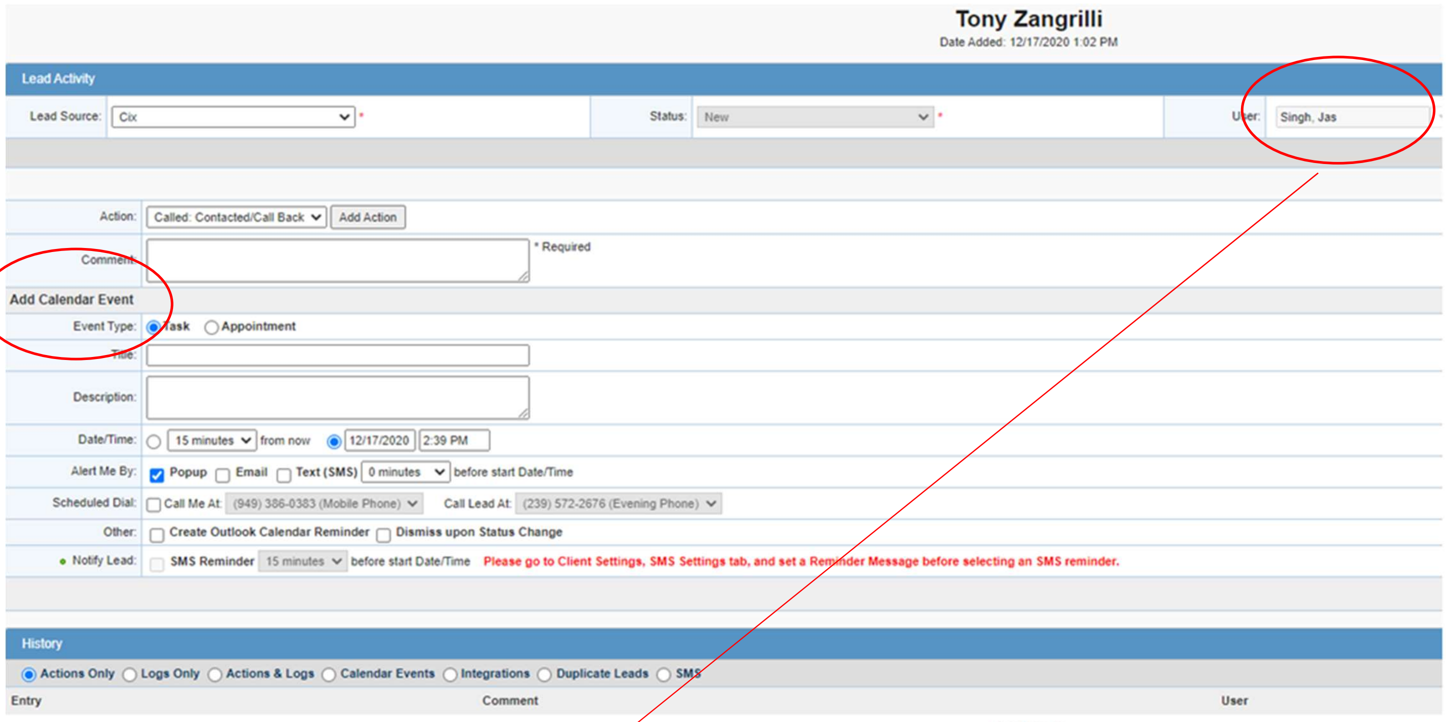


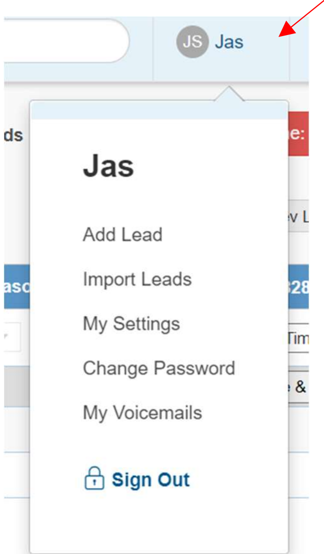
When selecting the **Action Box**, the drop-down list is to the right. You will choose one of these.

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



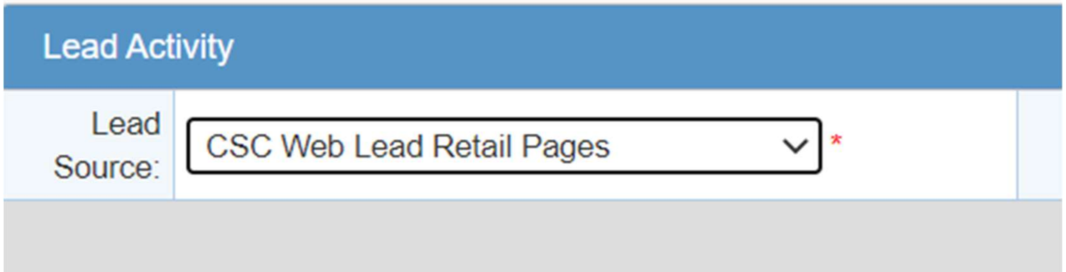
Below is the **Lead Activity** information that is completed to follow up with the client. Complete the **Add Calendar Event** information for it to create the follow-up reminder.





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

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



Complete by selecting the Borrowers information to update the Lead.