Affinity Partnerships

How to Create & Submit the Daily Status Report

Purpose: **To provide daily metrics and analytics related to multiple platforms. The data will be used to enhance lead quality across each platform.**

Process: **Below are the Steps for creating and submitting the Daily Status Report.**

Step 1: The Daily Status Report data needs to be pulled from your LMS (ie. Leads360, Leads Mailbox, etc…). The following date range should be pulled:

- The date range for the data should include the current report run date and 8 days back (for example, if the report is being run on March 12th, it would include the date range of March 4-12.)

Step 2: Using the approved template ("Daily Status Report Template"), export the requested data from your LMS into an Excel Spreadsheet

Lender	Campaign	Date Added	First Name	Last Name	Property Zip Code	Property State	Email	CostCo Member Type

Desired Loan Amount	Existing Home Value	Ref Id	Loan Type	Day Phone	Evening Phone	Mobile Phone	Credit Profile	Total Contact Attempts	LMS Status	Status	Cascade Status

IMPORTANT: When exporting the data it must remain in the exact column order as the "Daily Status Report Template." In addition, the exported spreadsheet should not contain any additional columns not found in the template.

Field Explanation:

Column Name	Column Description
Lender	Lender Name (Example = Capwest)
Campaign	Platform Name (Example = Costco Mobile) • Costco, Costco Mobile, Costco Short Form • Refinance.com, VA Loan Ranger, Rates on the Fly
Date Added	Date you received the lead
First Name	Borrower's First Name
Last Name	Borrower's Last Name
Property Zip Code	Borrower's Property Zip Code
Property State	Borrower's Property State
Email	Borrower's Email Address
Costco Member Type	Borrower's Costco Member Type • Executive Goldstar Member • Executive (Not Validated) • Goldstar Member • Business Member

	• Non-Executive (Not Validated) • Executive Business Member
Desired Loan Amount	Requested Loan Amount
Existing Home Value	Current Home Value
Ref ID	Lead ID
Loan Type	Type of Loan Requested • Purchase, Refinance, VA Loan, HARP, HELOC
Day Phone	Borrower’s Day Phone #
Evening Phone	Borrower’s Evening Phone #
Mobile Phone	Borrower’s Mobile Phone #
Credit Profile	Borrower’s Credit Rating • Excellent • Very Good • Good • Fair
Total Contact Attempts	Total # of times you have attempted to make contact with the lead
LMS Status	Status pulled from you LMS
Status	Based upon the “Detailed Status Map” translation *(explained below)*
Cascade Status	Based upon the “Cascade Status Mapping” translation *(explained below)*

Step 3: Once the data has been exported, the "Status" column now can be populated. The "Status" column needs to be populated using the mapping referenced below:

Lender Status	*Detailed Status Map*
Archived	Opportunity Exhausted
Attempting Contact	Open Opportunity
Bad Lead	Bad Lead
Cancelled/Declined	Application Denied/Withdrawn
Closed	Closed
Contacted	Open Opportunity
Credit Pulled	Open Application
Do NOT Call	Opportunity Exhausted
Funded	Closed
Loan Setup	Active Locked Loan
Manager Review	Opportunity Exhausted
New	Open Opportunity
New Assigned	Open Opportunity
Not Qualified	Opportunity Exhausted
Nurture	Opportunity Exhausted
Prequalification	Open Opportunity
Presented Options	Open Opportunity
Priority Purchase Setup	Open Application
Purchase Incubation	Lead Nurture
Purchase Nurture	Lead Nurture
Purchase Pre-Approval	Open Opportunity
Refinance Nurture	Lead Nurture
Re-Market	Opportunity Exhausted
Sent to Processing	Active Locked Loan
Sent to UW	Active Locked Loan
SmartCredit Re-Market	Pre-Application Disqualifed
TEST STATUS	Test Lead
Unable to Contact	Opportunity Exhausted

<u>Step 4</u>: After populating the “Status” column, you will now need to populate the “Cascade Status” column using the mapping referenced below:

Lender Status	***Cascading Status Mapping***
Archived	
Attempting Contact	
Bad Lead	Contacted
Cancelled/Declined	Contacted
Closed	Closed
Contacted	Contacted
Credit Pulled	Qualification
Do NOT Call	Contacted
Funded	Closed
Loan Setup	Locked
Manager Review	Contacted
New	
New Assigned	
Not Qualified	Contacted
Nurture	Contacted
Prequalification	Qualification
Presented Options	Qualification
Priority Purchase Setup	Qualification
Purchase Incubation	Contacted
Purchase Nurture	Contacted
Purchase Pre-Approval	Contacted
Refinance Nurture	Contacted
Re-Market	
Sent to Processing	Locked
Sent to UW	Locked
SmartCredit Re-Market	Contacted
TEST STATUS	
Unable to Contact	

Step 5: Once all of the columns have been populated, save the file as a .xls (Excel 97-2003 Workbook).

Step 6: Email the completed file to reports@affinityps.com or contact Karis@affinityps.com to request a Box.com location for daily uploads.

IMPORTANT: The report is due daily before 10 AM PST.

Step 7: Note: You can find a copy of the template, and this “How To” document by logging into the “Lender Portal,” found on our www.affinitypartnerships.com website.