iToolPro

internet tools for professionals

1. Introduction

Thank you for signing up for iToolPro Website. Your new professional website offers a host of great features to promote your business and increase your conversion rate.

This user guide is designed to help you step-by-step through the setup and working of your site. From your first login and setting up your home page to managing your contacts and checking your iStats, you will find all the information you need right here in this guide.

Your website comes with several power-packed features that can be utilized to your benefit. To realize the full potential of your new website, please take some time to go through this user guide to understand all the features and how they can be modified. Use the guide's easy-to-navigate topic index to quickly find the information you require. The navigation pane to the left of your screen lists all the featured topics for quick navigation.

So go ahead and make the most of your new website!

2.Getting Started

This first chapter guides you through the crucial steps of your first login, setting up essential components of your site, and an introduction to your home page in order to get your site up and running.

This section features the following topics:

2.1 Login Procedure

2.2 Setup Wizard

2.3 What Your Website Will Have

2.1 Login Procedure

2.1.1 Your Login Details

- You will receive an email from registration@itoolpro.com when you sign up for the Website package. This email will contain your website address, along-with your username and password.

- Once you receive the email, click on the URL (link) provided in the email. If this does not open a new window, copy paste the URL in your browser address bar and click 'Go'.

- The page you see will be the Home Page of your iToolPro Website. There will be several sections, buttons and links on the home page that will be explained in depth later in this guide.

- To login to your iOffice, locate the 'Login' link at the bottom of your home page. Click on this link to access your **iOffice Account Login** page.

2.1.2 Account Login Page

- Your account Login page will look something like this:

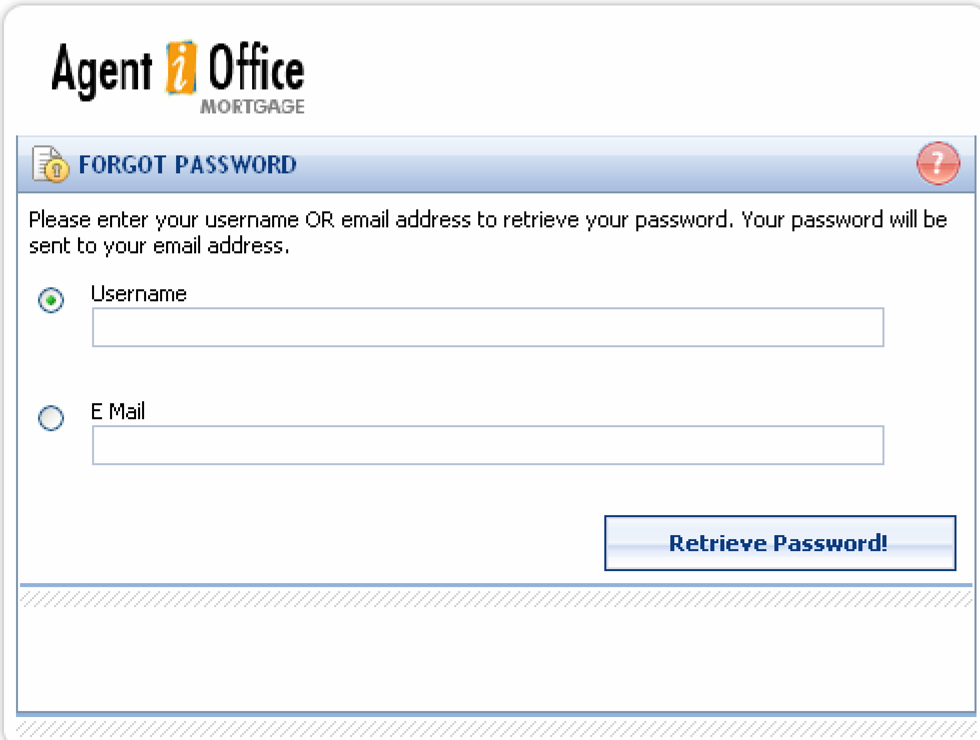
- Enter your username and password as mentioned in the email that you received. (Please remember that your username and password is case sensitive)

- Click on the 'Log In' button to enter the iOffice.

2.1.3 Forgot Password

- In case you forget or misplace your password, you can retrieve it by clicking on the **Forgot Password** link located below the Log In button.

- Clicking on the link will open the following page



- Enter either your username or email address by selecting the appropriate radio button and click on the **Retrieve Password** button.

- Your iToolPro Website password will be emailed to the account specified in your subscription.

2.1.4 Your iOffice Page

- By default, the first page you see when you log in to your website will be your **iOffice**. The iOffice is the main control center of your website. Please refer to the chapter on iOffice for details on the various features and functional aspects.

Note: The first time you login to your website, you will be guided through a Setup Wizard

2.2 Setup Wizard

The Setup Wizard runs automatically the first time you log into your iOffice. This wizard guides you through some quick steps that are essential to customize your website. Information entered in this first Setup Wizard can be changed anytime by running the wizard again through the iOffice.

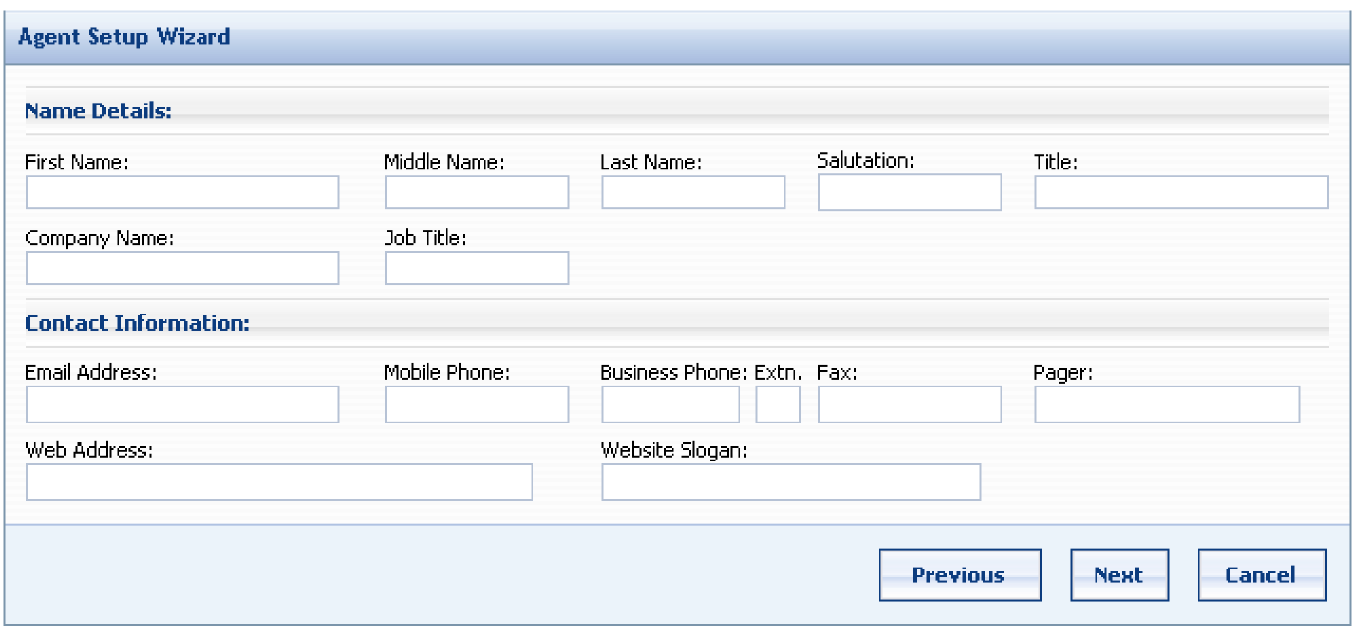
The Setup Wizard consists of three steps:

2.2.1 The Agent Setup
2.2.2 Company Setup
2.2.3 Application Form Selection

2.2.1 Step 1 — Agent Setup

- The first step of the Setup Wizard will collect some basic information such as your name, contact details, company name, and website slogan. Enter these details in the fields provided.

- Once all the information has been entered, click on the Next button at the bottom right hand corner to proceed to the next step of the wizard.

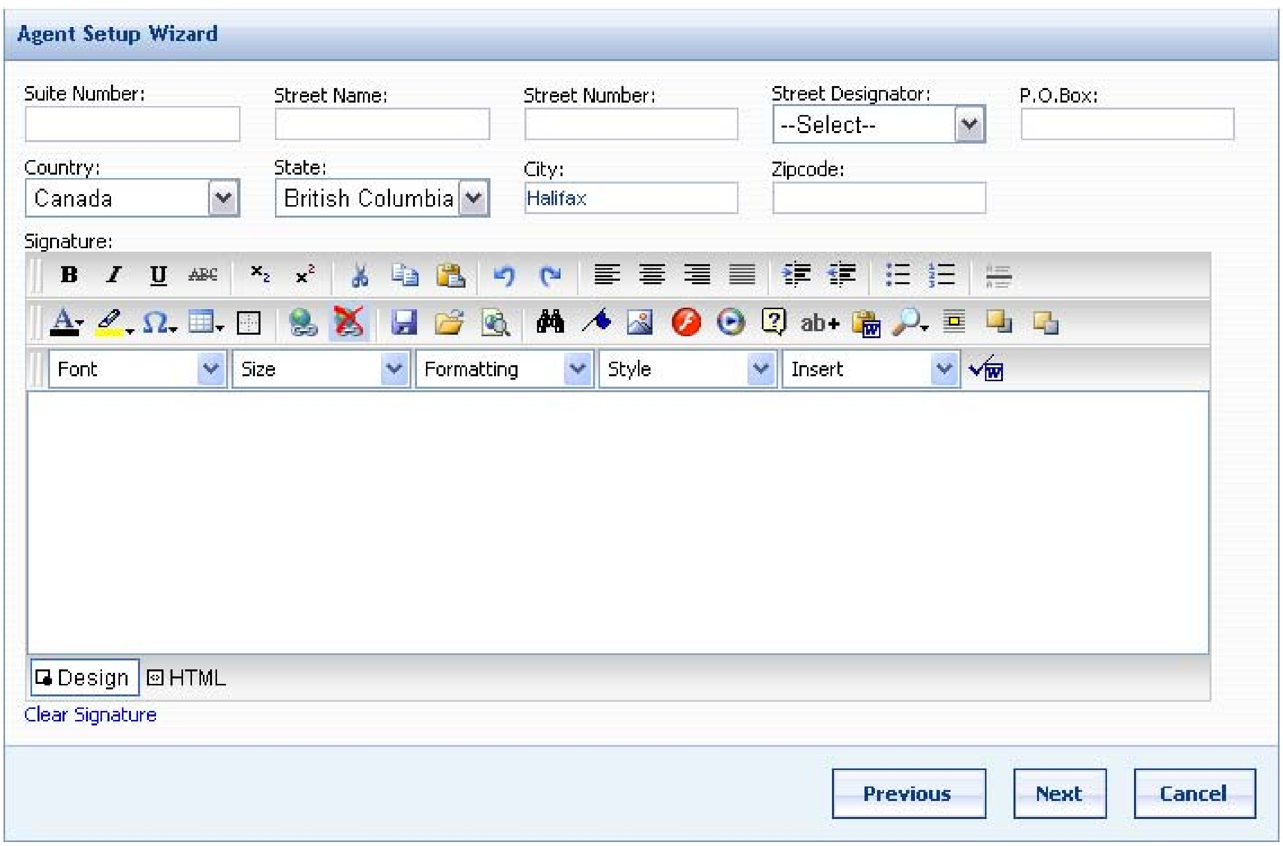


2.2.2 Step 2 — Company Setup

- The second step of the wizard will guide you through the setup of your company information. The form will contain details such as your company address and your personal signature.

a. Adding your Personal Signature

- The lower half of the Company Setup form consists of a Signature section which allows you to customize your personal signature. The signature can contain your photo, company logo, and your company URL apart from any other contact information that you might want.
- The Signature pane is a rich-text editor, allowing you several formatting options such as font selection and alignment.



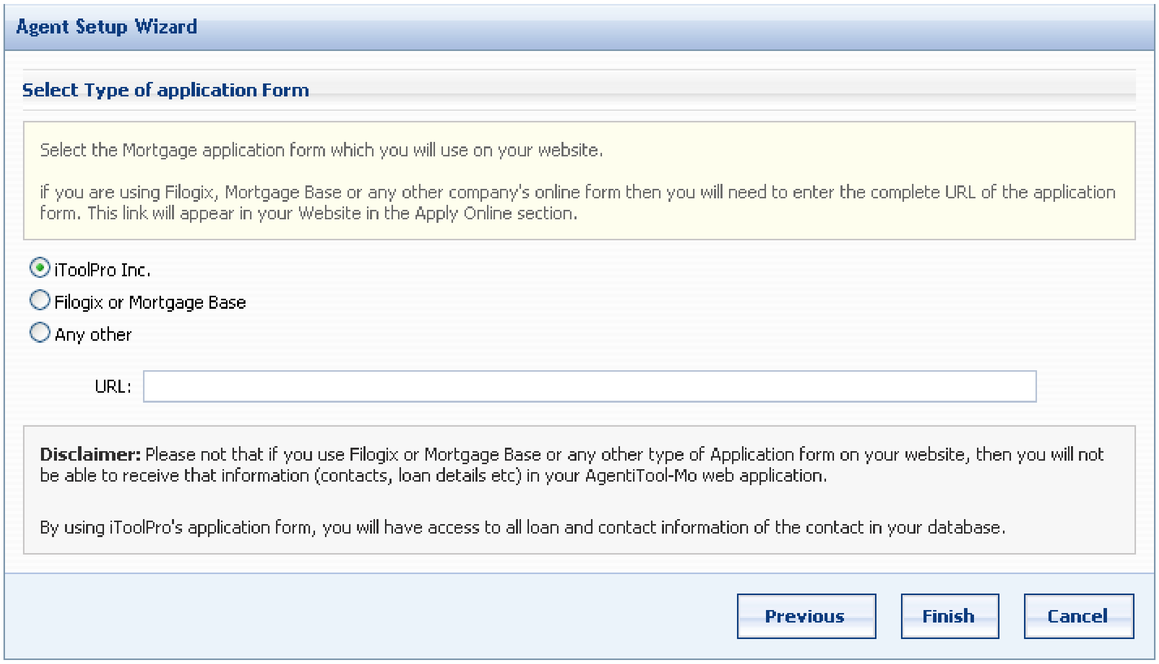
- You can enter your signature details in the space provided and also add your photo or company logo using the 'Insert' drop down menu as shown in the above image.

- To add a URL to your signature, click on the ‘Insert link’ option below the Signature editor. A dialogue box will prompt you to specify the desired URL. Click OK to insert the URL in the position where you last placed your cursor. Alternatively, you can also click on the  (insert hyperlink) symbol in the rich-text editor to insert the link.

Once all the details have been entered, click on the Next button to proceed to the third and the final step of selecting the Application Form.

2.2.3 Step 3 — Select Application Form

- The third step of the Setup Wizard will ask you to select the application form that you would like to use on your website.
- To select iToolPro’s application form, select the radio button next to iToolPro Inc.
- To select a Filogix or Mortgage Base application form, select the appropriate radio button and specify the correct URL in the URL field. This URL will appear on your website under the Apply Online section. Make sure the URL is precise so that it functions correctly.
- You can also specify the URL of another form provided by selecting the ‘Any Other’ radio button.
- Click on the ‘Finish’ button to complete the Setup Wizard.



After completing the Setup Wizard, you will log in to your iOffice. The iOffice lets you take charge of your site and make any modifications that you may require. For detailed information on this section of your website, please refer to the section on iOffice. You can access the Setup Wizard anytime after this first process through the iOffice secondary link panel.

Next, let us have a look at the layout of your website.

2.3 What Your Website Will Have

Once you have completed all the setup procedures, your very own customizable website is good to go. The look and feel of your website will depend on the template you picked during the website creation process. This template can be edited as per your requirement. Please refer to the Change Theme section for more information.

Regardless of the template you selected, all your website pages will have certain common features such as a page header, a three column page body and a footer area. Each of these sections has several components that can be altered. To find out more about the different sections of your website, let's have a closer look at your Home Page.

2.3.1 Your Home Page

Your Home Page is the first page that your users see when they visit your website. Depending on the template you chose at the time of registration, your home page will look something like this:

The individual features of your home page are given below.

Page Header

- The Page Header is the topmost part of all your pages. The page header usually comprises of your personal photo, company logo and slogan. However, the layout of your home page might differ depending on your template selection. You can add your own slogan, logo and photo through the initial Setup Wizard process or change it at a later stage by using the Edit Site feature.

Left Panel

- The left panel contains all the major navigation links to the different sections of your website. It may also contain the agent photo, and company logo and contact information depending on the template selected.

- Whenever you remove a certain page from your website, the corresponding link to that page will also be removed from the left panel automatically. Similarly, whenever a new page is added, the corresponding link will be added to your left panel.

- No user control can be added to the Left Panel when editing your website.

- You can sort the pages that are listed in the left panel according to your preference. This process is explained in detail in the Edit Site section under Sort Menu.

Center Panel

- The center panel contains the main body of your home page. The default website that you start with will contain default content in the center panel of the home page. This can be modified later using Edit Site.

- On the other pages of your site, the center panel can also contain Application Forms, Calculators and other controls such as your Lender's List and the iFrame. Using Edit Site, you can add or remove controls from the center panel. The content in the center panel can also be completely modified.

Right Panel

- The right panel serves as a supplementary control holder. You can add any of the available user controls to this panel.

- Custom content can also be added to the right panel using Edit Website.

Page Footer

- The page footer is the bottom-most part of your website. The footer contains banner advertisements (Basic edition only) and the same navigation links as are present in the left panel.

- The page footer also contains the 'Login' link required to sign in to your iOffice, and other general functional links such as the Site Map and the Privacy Policy. These links cannot be altered.

1. The iOffice

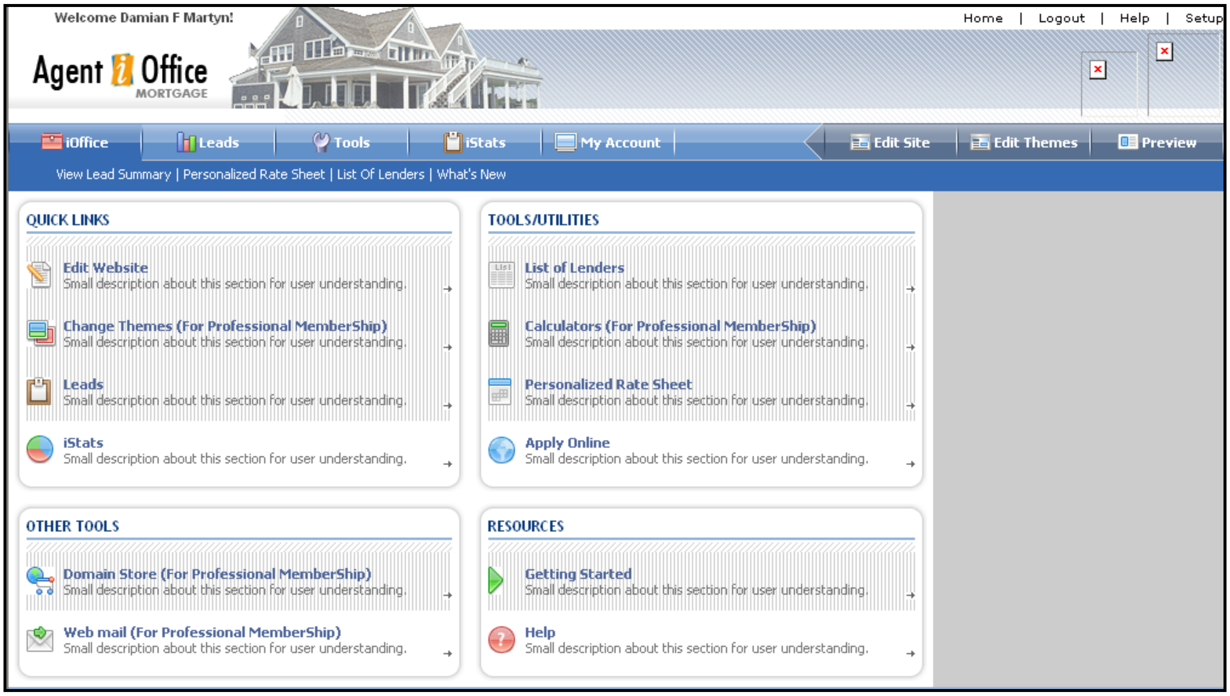
Once you have figured out the different sections in your website page, you might be interested in knowing how you can modify them. The iOffice is the main control center of your website, allowing you to add, remove, and modify most of the components that are available in your subscription.

By default, whenever you log in to your iToolPro Website account, you will start at the iOffice Home Page. You can access the various areas of your iOffice from the navigation links provided.

The following sections give a detailed insight into the different functional aspects of your iOffice.

1. Home Page

The Home Page of your iOffice is the first page that will open every time you log into your iToolPro Website. A sample of your iOffice home page is given below



The iOffice home page is divided into the following sections:

1. Quick Links

- **Edit Site**
  The Edit Site mode allows you to customize the layout of your website. Using this, you can add, modify, or delete the different user controls and custom content areas of your website. You can also add new pages and personalize them or delete the ones that you do not require. For more information on this topic, please refer to the Edit Site section of this guide.

- **Edit Themes**
  The Edit Themes mode allows you to change your website template or make modifications to the existing one by changing the color scheme. You can preview your website before accepting the changes. For more information on this topic, please refer to the Edit Themes section of this guide.

- **Leads**
  The Leads section manages the leads that come in through the various forms on your website. The Leads Manager allows you to add, delete and modify lead details. For more information on this topic, please check the Leads section of this guide.

- **iStats**
  The iStats section shows you the statistics of your website; the number of hits received, most visited pages, daily, weekly and monthly traffic and server errors among other details. This will let you analyze the strong and weak points of your website and make modifications accordingly. For more information on iStats, please refer to the iStats section of this guide.

2. Tools

- **List of Lenders**
  The List of Lenders allows you to display a list of affiliated lending banks, institutions or organizations on your website. This helps increase your goodwill by instilling a sense of trust in your clients. For more information on this topic, please refer to the List of Lenders section in this guide.

- **Calculators**
  Mortgage Calculators are online tools for your users to assess different details about their mortgage. For more information on Mortgage calculators, please refer to the separate section on the topic in this guide.

- **Personalized Rate Sheet**
  The Personalized Rate Sheet is a tabular representation of the mortgage rates offered by you in comparison to the ones that are prevalent in the market on a daily basis. The rates are mentioned for the different terms and can be changed as per your requirement. Please refer to the section on List of Lenders for more information.

- **Apply Online**
  The Online Application section allows you to manually enter a prospective borrower's loan information. This form is helpful if you are meeting a client in person and taking down information for a loan application. The Online Application page is similar to the loan application form present on your website. By submitting the form, the prospective borrower's record is entered into the Lead Manager for future reference.

3. Utilities

- **Domain Store**
  The Domain Store feature allows you to create your own domain or transfer an existing one to your iToolPro Website. For more information on domain management, please refer to the Domain Store section in this guide.

- **Web Mail**
  The Web Mail feature of your iToolPro Website allows you to configure and create mailboxes on your domain. For more information on email management, please refer to the Web Mail section in this guide.

4. Resources

- **Getting Started**
  The Getting Started section will give you certain basic information about configuring your website's essential components and services.

- **Help**
  The Help link takes you to the online version of the user guide for instant access.

4. Edit Site

Your iToolPro Website is completely customizable, allowing you to change the entire appearance and layout of how your pages appear to the end user. The Edit Site mode of your iOffice allows you to modify the appearance and contents of your various web pages. This powerful yet easy-to-use section of your website will allow you to personalize every element on your site.

- To access the Edit Site section, click on the Edit Site link located in the top right hand side of the iOffice page.

- Alternatively, you can click on the Edit Site link on the home page of your iOffice.

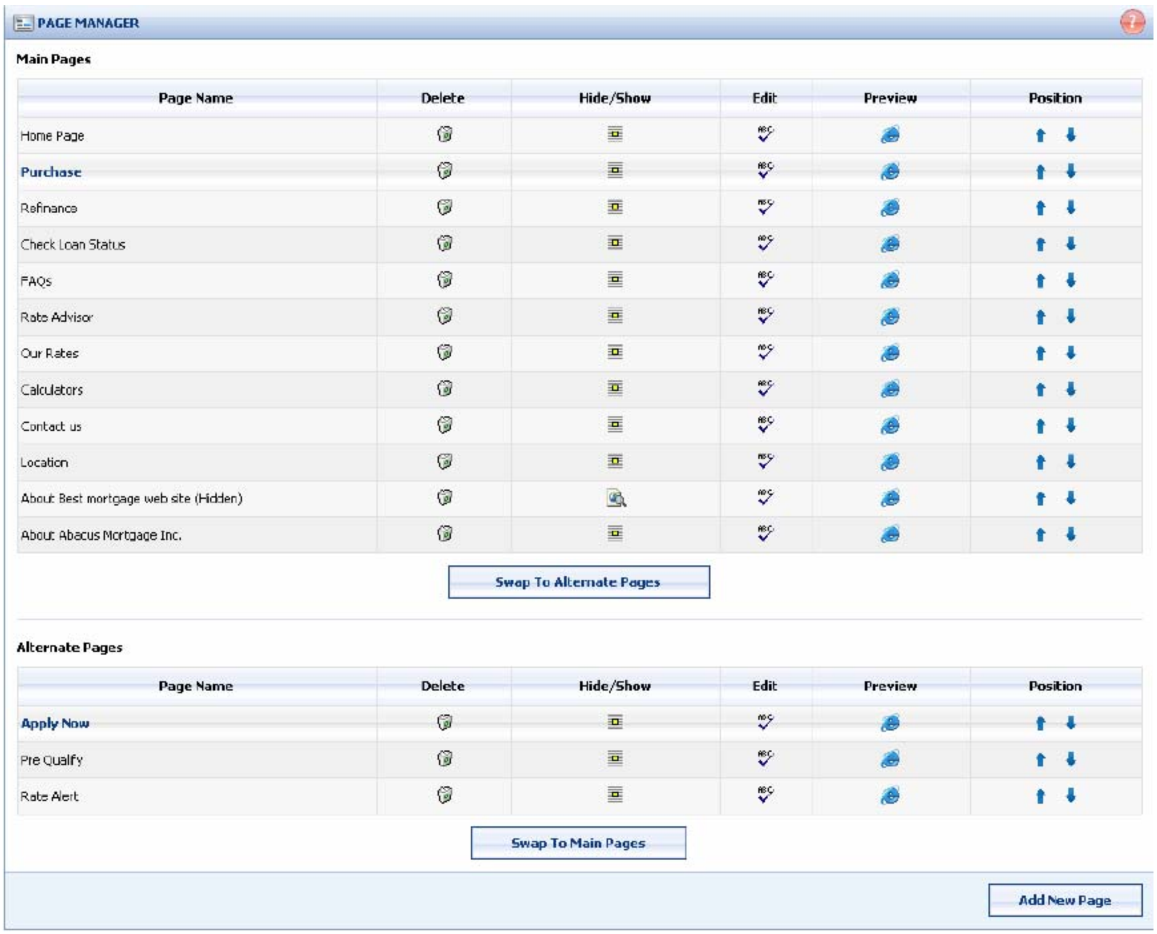
The first page that opens up in the Edit Site mode will be the Page Manager.

- There are 3 main links in Edit Site that appear just below the page header. These are:

  4.1 Page Manager – Allows you to manage all your pages from a single tabular list
  4.2 Edit Pages – Takes you to the edit mode where you can add, remove and modify the content of your web pages.
  4.3 Sort Menu – Allows you to change the sequence of the links as they appear in the left panel.
  .

4.1 The Page Manager

1. The main page of the Edit Site mode contains the Page Manager. The Page Manager is a tabular listing of all the pages that are present on the website. A sample Page Manager is given below:



PAGE MANAGER

Main Pages

Page Name	Delete	Hide/Show	Edit	Preview	Position
Home Page					
Purchase					
Refinance					
Check Loan Status					
FAQs					
Rate Advisor					
Our Rates					
Calculators					
Contact us					
Location					
About Best mortgage web site (Hidden)					
About Abacus Mortgage Inc.					

Swap To Alternate Pages

Alternate Pages

Page Name	Delete	Hide/Show	Edit	Preview	Position
Apply Now					
Pre Qualify					
Rate Alert					

Swap To Main Pages

Add New Page

2. The Page Manager is divided into 7 columns:

4.1.1 Page Name
4.1.2 Delete
4.1.3 Hide/Show
4.1.4 Edit
4.1.5 Preview
4.1.6 Position

Each of these functions is explained in detail below under each individual topic.

4.1.5 Preview

The 'Preview' button allows you to check the layout of the page as it would appear to the end users of your website. This function allows you to check the end result of the changes that you might have made to a webpage. If the layout is not according to your liking, you can always make further changes to the site using the Add Content feature.

To preview a page:

Method 1

1. Select the page that you want to preview from the drop down page list.

2. Once the page opens within the Edit Site page, click on the 'Preview' button located in the top right hand corner in the primary link bar.

3. A new internet browser window will open, displaying the final layout of the site.

Method 2

1. Open the Page Manager

2. Locate the page you want to preview from the page list and click on the corresponding Preview icon under the preview column to view the page in a new browser window.

   A new internet browser window will open, displaying the page of your choice.

3. The Page Manager is also divided into two halves; the top half for Main Pages and the bottom half for Alternate Pages. Alternate Pages are those links that appear in the top right hand corner of your iToolPro Website. You can use the Page Manager to sort the order of pages according to your preferences.

4. The Page Manager also contains an ‘Add New Page’ button at the bottom of the page list. You can use this button to add new pages to your website. Please refer to the Add a New Page section for more information.

4.2 Edit Pages Mode

The Edit Pages mode allows you to make all the required changes to your web pages. To enter the Pages mode, click on the Edit Site link from the set of 3 links situated at the top of the page, just below the page header.

- Once the Edit Pages page is open, you will see the following controls in the top panel:

- The lower half of the Edit Pages page will display the different user controls that are present on the page selected in the ‘Go to Page’ drop-down menu.

- Using the different buttons that are present in the top panel, you can perform several operations.

The Edit Pages mode allows you to:

4.2.1 Add a new page to your website
4.2.2 Add/remove user controls from an existing page
4.2.3 Delete a page from your website
4.2.4 Hide a page / Unhide a page
4.2.5 Change the Meta Tag Information of the web page
4.2.6 Reset Changes

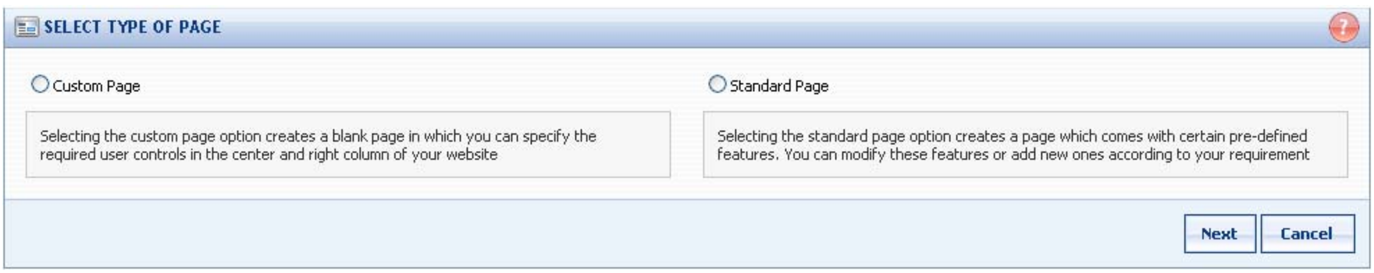
4.2.1 Add a New Page

1. Adding a Custom Page

Adding a custom page to your website allows you to specify the components that you wish to add to your webpage. These components comprise the different user controls that are available under your subscription. The following steps will guide you to add a custom page to your website:

1. On the top panel of the Edit Pages page, click on the Add New Page button.

2. On the next page, you will be asked to select either a **Custom Page** or a **Standard Page**. Select the Custom Page Radio Button.



3. Enter the name and title of the new page that you wish to add to your website and click on Next.

4. Next, select the user controls that you wish to add to the page and specify their alignment from the drop down menu. You can add the following features to a custom page:
   - Custom Content
   - Links
   - Quick Contact
   - Our Rates
   - iFrame
   - Contact Us
   - Lenders' List
   - Mortgage Calculators

For details on each of these components, please refer to the respective sections in this guide.

5. Once you have selected all the required user controls, click on the Save button to complete the page creation process.

6. Your new page is ready and the various user controls can be modified as per your requirements. For more details on how to edit user controls, please refer to the topic on User Controls.

Note: You can also add a new page from the Page Manager. Click on the Add New Page button at the bottom of the page list and follow the same procedure as described above.

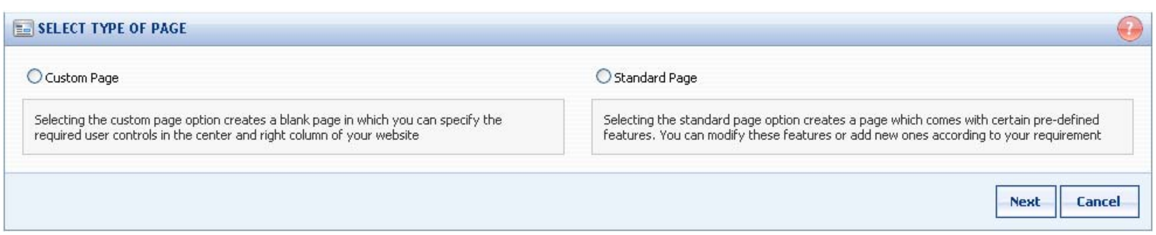
2. Adding a Standard Page

A standard page is one that need not be customized as it comes equipped with a ready form and content. All the pages that are present on your site at the beginning fall under the category of standard pages. If you happen to delete any of these pages, you can always add them again using the **Add Standard Page** option.

To add a Standard Page to your website:

1. On the top panel of the Edit Pages page, click on the Add New Page button.

2. On the following page, select the Standard Page radio button and click next.



3. On the left-hand side of the following page, you will see a list of pages that are already present on your website. The right-hand side page list includes the pages that can be added. Select the pages you wish to add to your website and click on 'Next'.

4. The standard page will be added to your website. To view the page, select it from the drop down page list in the Edit Website mode.

5. You can further personalize the page by adding different user controls.

6. If all available standard pages have already been included in your website, then the list on right-hand side will be blank. You can then use the Add Custom Page option to include additional pages in your website.

Note: You can also add a new page from the Page Manager. Click on the Add New Page button at the bottom of the page list and follow the same procedure as described above.

4.2.2 Add/Remove User Controls from an Existing Page

The ‘Add Content’ button in the Edit Pages mode allows you to make changes to an existing page. You can personalize a default page that was supplied to your site or make changes to a new page that you created.

The Add Content feature allows you to manage the user controls that will be available on each page of your website.

1. From the Page Manager, select the page that you want to personalize by clicking on the Edit link. The contents of the page will be displayed in the lower half of the Website Editor.

2. Click on the 'Add Content' button located above the page view. A new page will show you the complete list of available user controls.

3. Select the user control you want to add to the page and specify its alignment from the drop down menu. Click on Next.

4. You will be taken back to the Edit Pages page with the new controls added to the body of the page. You can change the position of the user controls by using the simple mechanism of *drag and drop*. Remember that the user controls can only be placed in the center or right panel.

   For details on how to *edit* or *delete* these user controls, please refer to the chapter on User Controls.

4.2.3 Deleting a Page

The Delete Page option allows you to completely remove a page from your website.

Method 1

1. Select a page to be deleted from the drop down menu on the Edit Pages page.

2. Click on the 'Delete Page' button located in the top panel.

3. A confirmation message will ask you whether you want to delete the selected page.

4. Click on OK to confirm the deletion of the page. The page will be removed from the page list and the link for the same will be removed from the left panel as well as the page footer.

Method 2

1. Open the Page Manager.

2. Locate the page you want to delete from the page list.

3. Click on the corresponding Wastebasket icon  under the Delete column to delete the page.

4. A message box will confirm whether you want to delete the page. Click OK to delete the page from your website.

4.2.4 Hiding a Page

The Hide Page feature allows you to restrict your users' access to a particular page. This feature is beneficial especially when a new page is under construction and you do not want your users to access it. The page will not be visible to your end users but will continue to exist in your iOffice.

Method 1

1. Select the page you want to hide from the drop down page list in the Edit Pages mode.

2. Click on the 'Hide Page' button located in the top panel of the page to hide the particular page.

3. The links to that page will be removed from all other pages automatically.

Method 2

1. Open the Page Manager

2. Locate the page that you want to hide. Click on the corresponding Hide icon under the Hide column to hide the page.

3. The page that you hide will contain the word ‘Hidden’ next to its name in the page list.

Unhide a Page

Method 1

1. To unhide a page, select it from the drop down page list on the Edit Pages page. The page name will have ‘(Hidden)’ next to it.

2. Once the page is selected and opened in the lower half of the Edit Pages mode, the ‘Hide Page’ button will change to ‘Show Page’

3. Click on the Show Page button to make the page visible to the end users.

Method 2

1. Open the Page Manager

2. Locate the page that you want to unhide and click on the corresponding Show icon under the Show column to unhide the page.

3. The page will be removed from the Hide mode and will be visible to the end users of your site.

4.2.5 Update Meta Tag Information

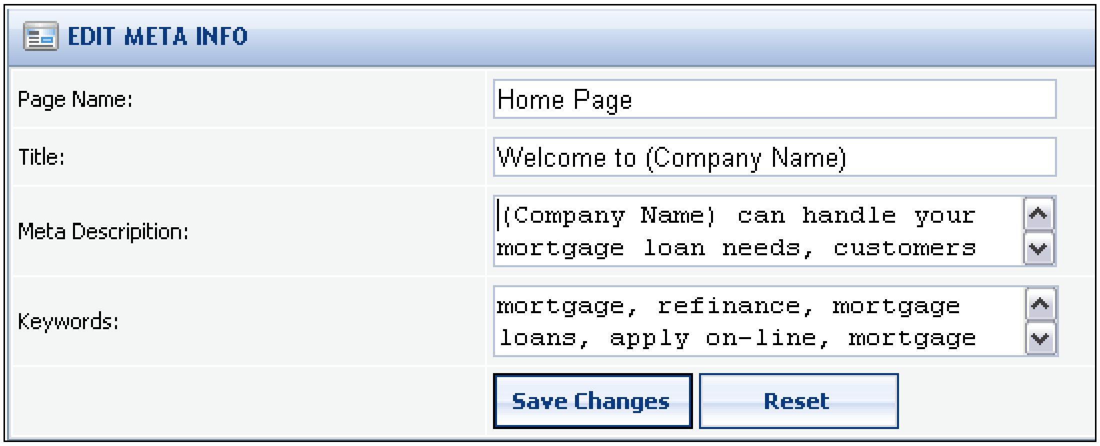
The Update Meta Tag Information control allows you to make alterations to the Meta tag information of a web page on your iToolPro Website. Meta tag information is what users see on the title bar of their web browser or in the website description that appears in a search engine. Optimizing your Meta tags to target your market can increase the chances of it getting a higher ranking in search engine, which in turn will increase the number of hits on your site.

Your iToolPro Website allows you to make changes to the Meta Title, Meta Description and the Meta Keywords of the site.

To make changes to the Meta Tag information of your website:

1. Select the page in which you want to update the Meta Tag information from the drop down page list in the Edit Pages mode.

2. Click on the ‘Update Meta Info’ button in the top panel of the website. The following page will open up:



3. The Edit Meta Info page has the following 4 fields:

- **Page Name –** Name of the page as it appears in your website
- **Title –** Title of the page as it appears in the title bar of your web browser
- **Meta Description –** The description of the page as it will appear in a search engine.
- **Keywords –** The keywords used by the search engine to locate your site.

After making changes to the Meta tags, click on the Save Changes button to return to the Edit Pages mode.

4.2.6 Reset Changes

The 'Reset Changes' button allows you to reset any changes made to a page. The result of the Reset Changes option is different for a Custom Page and a Standard Page.

1. Resetting a Custom Page

2. Select the Custom Page you want to reset from the drop down page list in the Edit Pages mode.

3. Once the page opens in Edit pages, click on the Reset Changes button located in the top right hand corner of the page.

4. On resetting, all the user controls that you have added to the page will be removed. The page will be clear allowing you to add a new set of user controls.

2. Resetting a Standard Page

1. Select the Standard Page you want to reset from the drop down page list in the Edit Pages mode.

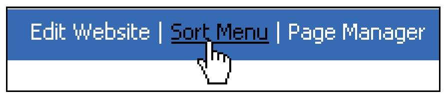
2. Once the page opens, click on the Reset Changes button located in the top right hand corner of the page.

3. On resetting, all the additional user controls that you may have added to the page while personalizing, will be removed. The page will be restored to its original form with only the basic form and content. ***Changes made to the textual content will not be affected when you reset a page.***

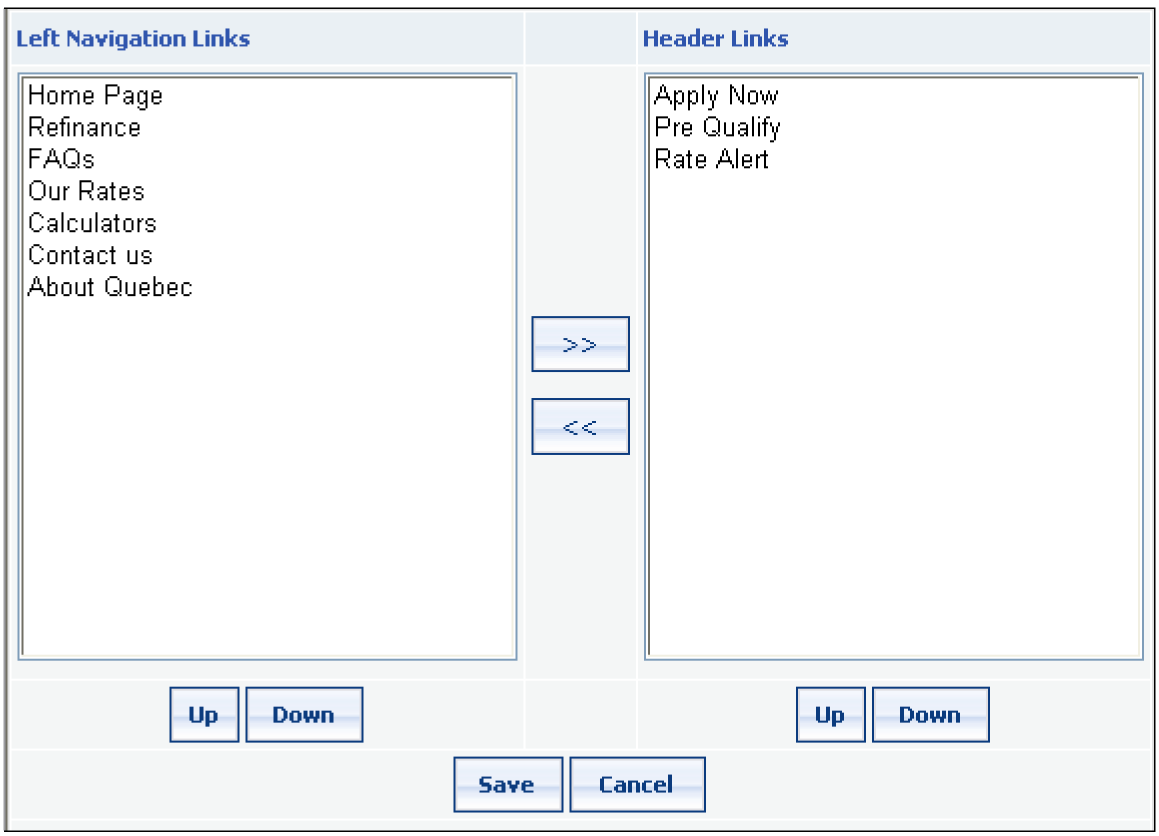
4.3 Sort Menu

The Sort Menu allows you to change the sequence of the links as they appear on your website's left navigation pane and the page header. Whenever a new page is added to the website or an existing page is removed, the link for that particular page will be added or removed from the sidebar, as the case might be.

1. To access the Sort Menu, click on the Sort Menu link located in the sub-links section of the Edit Site mode.



2. The next page will display the Sort Menu section.



3. The Sort Menu page is divided into two sections – the Left Navigation Links and the Header Links. You can decide which links will appear in the left panel and the page header by using the left and right arrow buttons located between the two sections.
   Note: The header links section can contain only 3 links.

4. Once you have decided which link will appear where on the site, you can further change the sequence of the links in each of the two sections

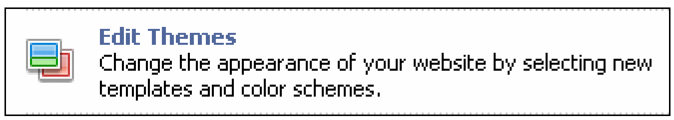
using the Up and Down buttons provided.

5. After finalizing the layout of the links, click on the Save button to save the changes to your website. You can view the changes made using the Preview option in Edit Site mode.

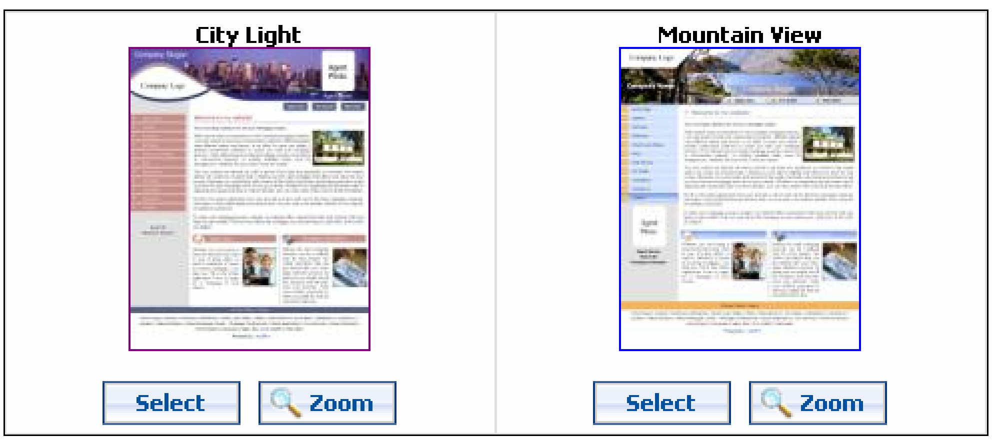
5. Edit Themes - Modifying the Appearance of your Website *(Plus Members Only)*

The appearance of your website can be completely modified, not only in relation to the different user controls present, but also in terms of changing the color scheme and design template. The Edit Theme option in your iOffice allows you to change the layout of your site according to your preference. You can change the template that you chose when you first set up your site or modify the existing color scheme.

- To access the Edit Theme section, click on the Edit Theme link on the home page of your iOffice or in the primary link bar.



- The main page of the Edit Theme section will have thumbnails of the different design template. Click on the Zoom button to view a larger sample of the template in a new window.



- Once you have decided on a template, click on the Select button. The next page will ask you to pick the color scheme for that particular template. Pick the color of your choice which you think will best suit the website. Click on the 'Change Template' button to complete the process and apply the new design template to your site.

5.1 Changing Only the Color Scheme

If you wish to change only the color scheme of your website template, you can do so by using the Change Color option.

- Click on the Change Color link in the sub-link section of the Edit Theme mode.

- Select the color scheme that you prefer by clicking on the appropriate color boxes present on the right-hand side of the thumbnail image. Selecting a particular color scheme will be automatically reflected in the thumbnail, giving you a better idea of what the end product will look like.

- After selecting the color of your choice, click on the Change Template button to apply the changes to your website.

5.2 Template History

- All the changes you make to your website template are saved in the Template History. This option allows you to quickly revert back to any previous theme or color scheme that you had selected.

- To view the Template History, click on the ‘Template History’ link in the secondary link panel of the Change Theme mode. The following page will appear.

TEMPLATE HISTORY

Template History	
City Light (Purple) Dec 26 2006 4:49AM	<< Change Template
Grey Blue (Blue) Dec 26 2006 5:13AM	<< Change Template
Mountain View (Green) Dec 26 2006 5:40AM	<< Change Template
Dream Home (Blue) Dec 26 2006 5:43AM	<< Change Template
Open Sky (Blue) Dec 26 2006 7:14AM	<< Change Template
Manhattan (Colourful) Dec 26 2006 10:13AM	<< Change Template

- This table shows the entire history of the changes made to your website template. To revert to any previous version, click on the Change Template link next to the corresponding date and time. The template will be changed to the version you selected.

6. Add Controls

User controls are the various tools and features that enhance the usability and efficiency of your site. These controls can be added to any page of your site using the Edit Pages feature. Once you have added a particular user control, you can then modify or delete it at a later stage.

Certain user controls are built into the default site that you start off with. You have the freedom to remove or modify these controls in order to personalize your site. The other controls can be added through the Add Content option under the Edit Pages mode. In order to further customize your website, you can even create a new page and add the user controls of your choice.

The user controls can be placed either in the right panel or the center panel of your website. To make it simpler for you, the Edit Pages mode supports ***drag and drop***. Once you have added the user control of your choice in a particular panel, you can simply drag and place it in any other location (*in the center or right panel only*) that you desire.

Most User Controls come with the following two features:

1. **Edit**
   The 'Edit' mode allows you to make changes to the control. You can modify the layout and appearance, personalize the content or add new content to the user control. Certain form-based user controls such as the Quick Online Application Form do not allow any changes to the existing form. You can only make changes to the custom text that supports the form.
2. **Delete**
   The 'Delete' function is common to all user controls. To remove a particular user control, simply click on the Delete link located in the top right-hand corner of the control. A dialogue box will prompt you to confirm the deletion. Click on OK to delete the particular user control.

The following user controls can be used on your website:

- 6.1 Custom Content
- 6.2 Personalized Rate Sheet (Our Rate)
- 6.3 Links
- 6.4 iFrame
- 6.5 Quick Contact
- 6.6 Lenders' List (Plus edition only)
- 6.7 Contact Us
- 6.8 Apply Now (Online Application Form)
- 6.9 Mortgage Calculators

Each of these user controls are explained in detail in the following sections.

6.1 Custom Content

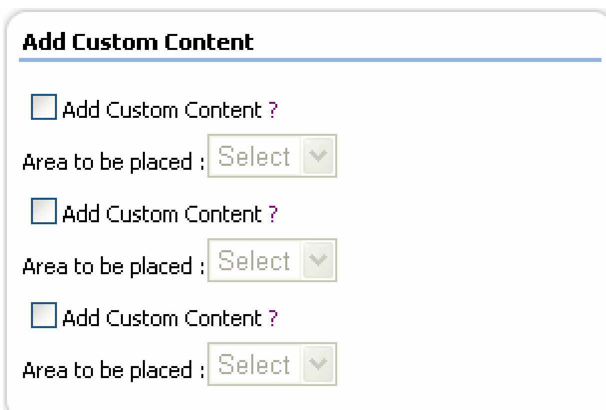
The Custom Content control is a blank textbox which allows you to enter the text, images or links of your choice. You can add up to three Custom Content controls per page. This control comes with the Edit and Delete options.

This section will guide you on how to:

6.1.1 Adding a Custom Content Control to your page

1. In the Edit Pages section, select the page where you want to add the Custom Content control from the drop down menu and click on the Add Content button at the top of the page.

2. On the next page, you will see a list of user controls divided into three sections. The leftmost section is the Add Custom Content section.



3. Depending on the number of Custom Content controls you want to add, select the corresponding checkboxes provided.

4. For each Custom Content control that you select, you will have to specify its placement on your web page from the drop-down selection menu. You can place the control either in the center panel or the right panel. The left panel is reserved only for the site navigational links.

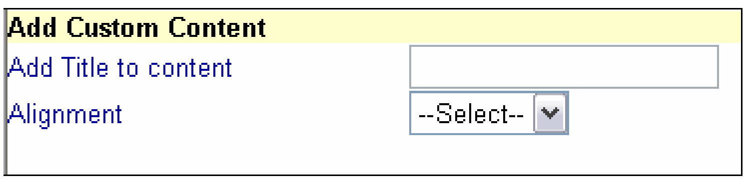
5. Once you have made the necessary selections, click on ‘Next’ to go back to the Edit Pages main page. You will see the layout of the page you just modified with the blank Custom Content boxes.

6.1.2 Editing the Custom Content Control

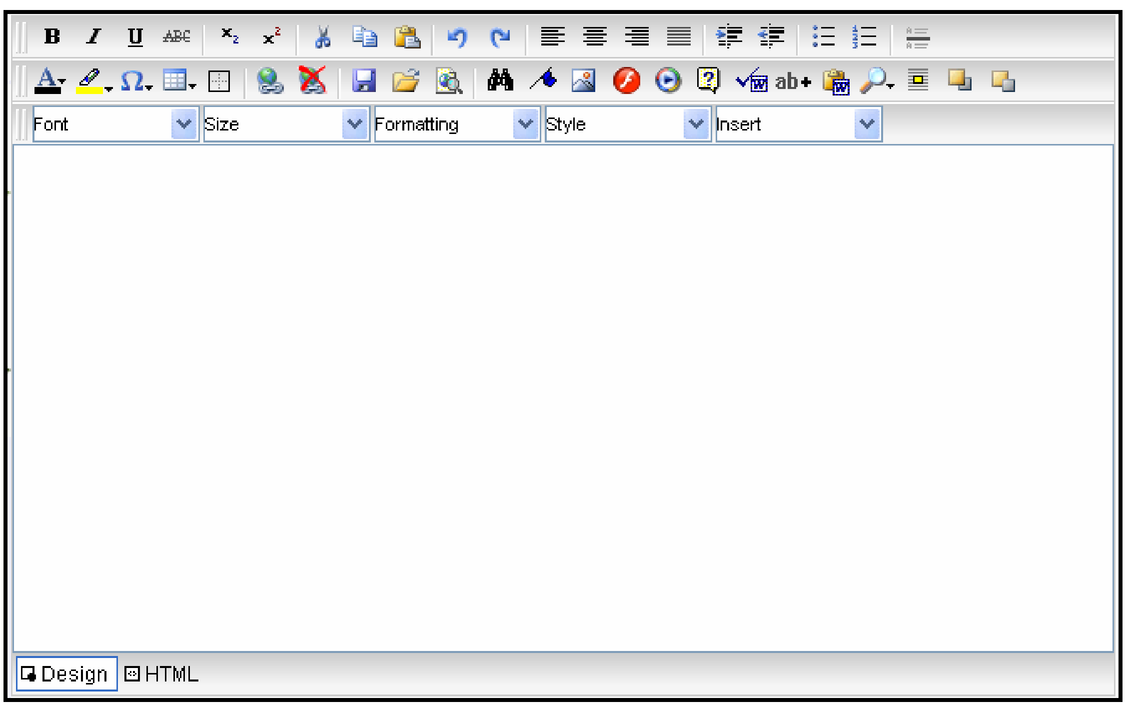
1. Once you have added the required number of Custom Content controls to your web page, you can modify them with the 'Edit' feature.

2. Each of the Custom Content controls that you have added will have an edit button within the control box. Click on the Edit button to go to the edit page of the Custom Content control.

3. On the Edit page, first enter the title of the content and specify the alignment of the same from the drop down menu.



4. The lower half of the edit page contains a rich-text editor.



You can add your content in the text editor using the several text formatting options available. You can also insert images, hyperlinks, media files and flash files in the text editor screen. If you are modifying an existing Custom Content control, you can make the required changes in this same text editor.

5. Once you have added or modified the content as per your requirement, click on the OK button located below the text editor to save the changes. You will be taken back to the Edit Pages mode of the page on which the Custom Content control is present.

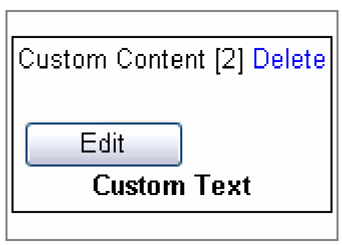
6. Click on the Preview button next to the drop down menu to see how the final output will appear to the end user. To make further changes, follow steps 2 to 5 until the desired effect is achieved.

6.1.3 Deleting a Custom Content Control

1. From the Edit Pages mode, select the page from the drop-down menu from which you want to delete a Custom Content control.

2. Once the page is displayed, you will see the various user controls that are present on the page.

3. Each user control will have a Delete link in the top right hand corner. The custom content control that you want to delete will have a similar link.



4. Click on the 'Delete' link to delete the particular user control.

5. A Delete clarification dialogue box will appear, confirming if you want to delete the particular user control. Click on OK to delete the user control from the web page.

6.2 Personalized Rate Sheet/Our Rate

The Personalized Rate Sheet gives a comparison between the mortgage rates offered by you and the current market rates. The Personalized Rate Sheet feature is known as ‘Our Rate’ on the agent website. Your Personalized Rate Sheet will look like this:

Personalized Rate Sheet

Term	Market Rate	Our Rate
6 Months	5.4%	5.4%
1 Years	6.8%	6.8%
2 Years	7%	7%
3 Years	7.25%	7.25%
4 Years	6%	6%
5 Years	6.5%	6.5%
6 Years	7.3%	7.3%

The first two columns of 'Term' and Market Rates' cannot be edited. The 'Our Rates' column can be edited to display the rates you offer.

This section will guide you on how to:

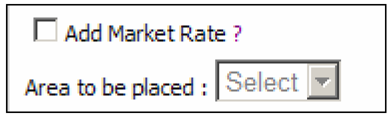
6.2.1 Add a Personalized Rate Sheet to your website
6.2.2 Edit a Personalized Rate Sheet
6.2.3 Delete a Personalized Rate Sheet

6.2.1 Adding a Personalized Rate Sheet to your page

1. Go to the Edit Pages mode within the Edit Site section.

2. In the Edit Pages section, select the page where you want to add the Our Rate control from the drop down menu and click on the Add Content button at the top of the page.

3. On the Add Content page, you will see a list of user controls. Select the check box next to the Our Rate control under the second column of 'Add Other Feature'.



4. Select where you want the control to be placed (center or right panel) from the drop-down menu.

5. Click on the Next button to go back to the Edit Pages page. Your new Rate Sheet will be visible either in the right or center panel, depending where you placed it.

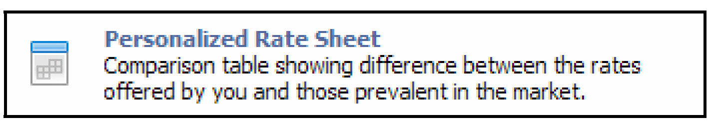
6. To change the position of your Rate Sheet, simply drag and drop the control and place it anywhere either in the center panel or the right panel.

6.2.2 Editing your Personalized Rate Sheet

You can only edit your rates in the Personalized Rate Sheet. The term remains constant and the Market Rates are updated from the system.

Making changes to the Personalized Rate Sheet

- On the home page of your iOffice, click on the Personalized Rate Sheet Link.



This will take you to the Edit page of the Personalized Rate Sheet. Here you can make the required changes to the rates that will be posted.


PERSONALISED RATE SHEET

Term	Posted Rates	Our Rate
6 Months	5.4%	5.4%
1 Years	6.8%	6.8%
2 Years	7%	7%
3 Years	7.25%	7.25%
4 Years	6%	6%
5 Years	6.5%	6.5%
6 Years	7.3%	7.3%

Edit Cancel

- Click on the Edit button to add your rates. Clicking on the Edit button will activate the 'Our Rate' column into editable text boxes. Enter your mortgage rates in each of these boxes next to the corresponding terms.

- Once you have added all the rates, click on ‘Save’ to update your rate sheet. The changes made will be reflected in all the rate sheets that are present on the different pages of your site.

6.2.3 Deleting a Personalized Rate Sheet

1. From the Edit Pages mode, select the page from the drop-down menu from which you want to delete a personalized rate sheet.

2. Locate the Personalized Rate Sheet on that page and click on the Delete link in the top right hand corner of the control.

3. A Delete clarification dialogue box will appear, confirming whether you want to delete the particular user control. Click on OK to delete the user control from the web page.

6.3 Links

The Links control allows you to add links of any other websites of your choice. These links may provide your users with some information, entertainment, mortgage related news or could lead to any other website of your choice. The Link control can be added to any page of your site, either in the center panel or the right panel.

This section will guide you on how to:

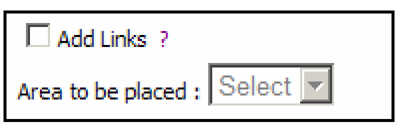
6.3.1 Add a Link control to your website
6.3.2 Add/Edit links in a Link control
6.3.3 Delete a Link control

6.3.1 Adding a Link control to your website

1. Go to the Edit Pages mode within the Edit Site section.

2. In the Edit Pages section, select the page where you want to add the Links control from the drop down menu and click on the Add Content button at the top of the page.

3. On the Add Content page, you will see a list of user controls. Select the check box next to the Add Links control under the second column of 'Add Other Feature'.



4. Select where you want the control to be placed from the drop-down menu.

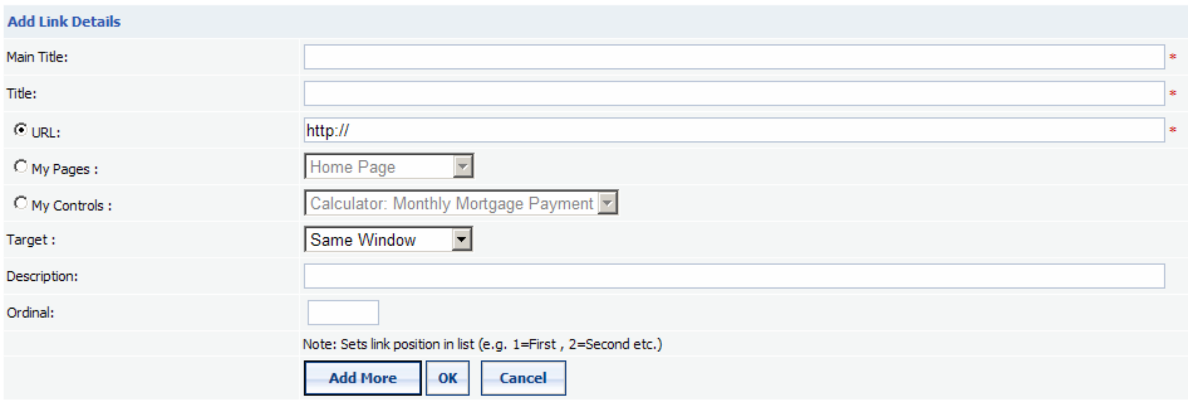
5. Click on the Next button to go back to the Edit Pages page. Your new Links control will be visible either in the right or center panel, depending on where you placed it.

6. To change the position of your Link control, simply drag and drop the control anywhere in the center or right panel.

6.3.2 Adding/Editing links in your Link control

1. Locate your Links user control by selecting the page on which it is placed from the "Go to Page" drop down menu.

2. Click on the Add Links button located within the user control. You will be taken to the Add Link Details page within the Edit Pages mode. You will see the following screen



3. Enter the main title of the Links control, along with the title for the hyperlink that will appear in the control box. You can specify an external website, open up another page within your website or link to one of the calculators available in your subscription by selecting the appropriate radio button.

4. You can specify if you want the hyperlink to open in the same window or in a new one by selecting the appropriate option in the Target drop down menu.

5. The Description field allows you to enter a short description for the link, which will appear once a user places the mouse pointer over the text.

6. The Ordinal field allows you to specify the position of the link as it will appear within the control. In case you have multiple links added within the same control, you can alter their sequence by giving a numerical denomination in the Ordinal field. E.g. mentioning 1 in the field will make the link appear first in the Links user control and so on.

7. Once all these details have been entered, click on the OK button to save the changes. If you want to save the changes and add more links, click on the Add More button.

6.3.3 Deleting a Links control

1. In the Edit Pages mode, select the page from the drop-down menu from which you want to delete a Links control.

2. Locate the Links control on that page. Click on the Delete link located in the top right hand corner of the control.

3. A Delete clarification dialogue box will appear, confirming if you want to delete the particular user control. Click on OK to delete the user control from the web page.

6.4 iFrame

The iFrame user control is a unique feature which allows you to display an entire website within your site. This feature is very useful in marketing another site that you might have or for promoting the site of an affiliate or partner. All you have to do is add the URL of the website you wish to display.

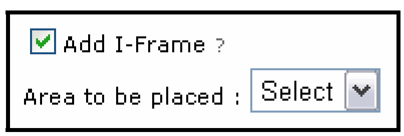
This section will guide you on how to:

6.4.1 Adding an iFrame control to your website

1. Go to the Edit Pages mode within the Edit Site section.

2. In the Edit Pages section, select the page where you want to add the iFrame control from the drop down menu and click on the Add Content button at the top of the page.

3. On the Add Content page, you will see a list of user controls. Select the check box next to the Add iFrame control under the second column of 'Add Other Feature'.



4. Select where you want the control to be placed from the drop-down menu.

5. Click on the Next button to go back to the Edit Pages page. Your new iFrame control will be visible either in the right or center panel, depending on where you placed it.

6. To change the position of your iFrame control, simply drag and drop the control where you want it.

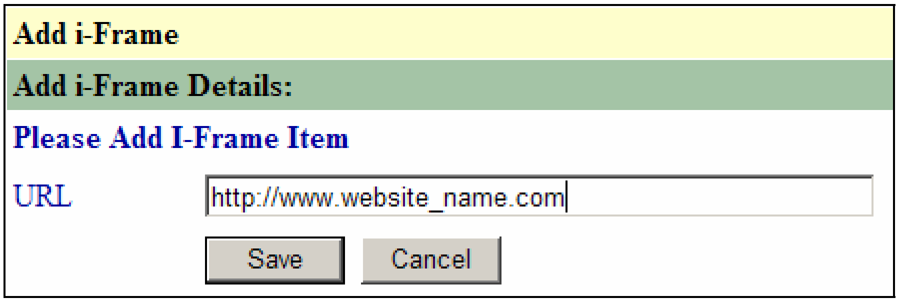
6.4.2 Editing an iFrame control

1. To specify the website that you want the iFrame control to fetch and display on your web page, open the page on which the iFrame control is

placed in Edit pages.

2. Locate the iFrame control and click on the Edit button.

3. In the page that follows, specify the URL of your choice in the field provided and click on Save.



4. The website you specified will be visible in the iFrame control on your Edit Pages page.

6.4.3 Deleting an iFrame control

1. In the Edit Pages mode, select the page from the drop-down menu from which you want to delete an iFrame.

2. Locate the iFrame control on that page. Click on the Delete link located in the top right hand corner of the control.

3. A Delete clarification dialogue box will appear, confirming whether you want to delete the particular user control. Click on OK to delete the user control from the web page.

6.5 Quick Contact

The Quick Contact form serves as a lead generation tool by fetching the necessary information from a prospect and registering it in the Lead Manager. The Quick Contact form is much shorter than a normal Contact Us form, making it simpler and more convenient for the users to fill up.

This section will guide you on how to:

Note: The Quick Contact control is a form and hence cannot be edited.

6.5.1 Adding a Quick Contact form to your website

1. Go to the Edit Pages mode within the Edit Site section.

2. In the Edit Pages section, select the page where you want to add the Quick Contact form from the drop down menu and click on the Add Content button at the top of the page.

3. On the Add Content page, you will see a list of user controls. Select the check box next to the Quick Contact control under the second column of 'Add Other Feature'.

4. Select where you want the control to be placed from the drop-down menu.

5. Click on the Next button to go back to the Edit Pages page. Your new Quick Contact form will be visible either in the right or center panel, depending on where you placed it.

6. To change the position of the Quick Contact form, simply drag and drop the control where you want it.

6.5.2 Deleting a Quick Contact form

1. In the Edit Pages mode, select the page from the drop-down menu from which you want to delete the Quick Contact form.

2. Locate the Quick Contact form on that page and click on the Delete link in the top right hand corner of the control.

3. A Delete clarification dialogue box will appear, confirming if you want to delete the particular user control. Click on OK to delete the user control from the web page.

6.6 Lenders' List

The Lenders' List control allows you to display a list of lending institutions or companies with whom you have an association. The control can be added to any page of your website. Displaying a list of prominent and noteworthy lenders will help boost your image as a reliable mortgage professional.

This section will guide you on how to:

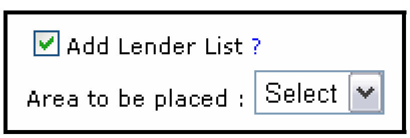
6.6.1 Add a Lenders' List to your website
6.6.2 Edit a Lenders' List
6.6.3 Delete a Lenders' List

6.6.1 Adding a Lenders' List to your website

1. Go to the Edit Pages feature within the Edit Site section.

2. In the Edit Pages section, select the page where you want to add the Lenders' List control from the drop down menu and click on the Add Content button at the top of the page.

3. On the Add Content page, you will see a list of user controls. Select the check box next to the Add Lender List control under the second column of 'Add Other Feature'.



4. Select where you want the control to be placed from the drop down menu.

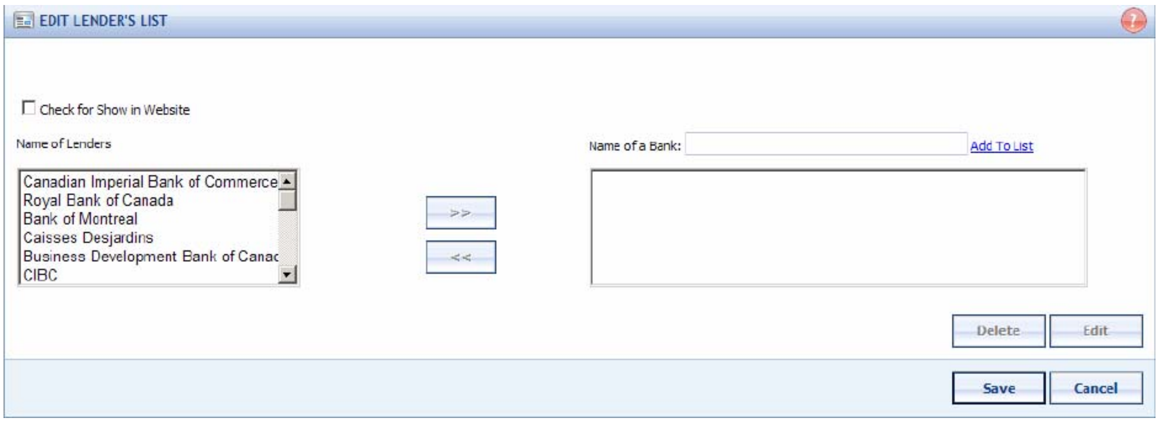
5. Click on the ‘Next’ button to go back to the Edit Pages page. Your new Lender's List control will be visible either in the right or center panel, depending on where you placed it.

6. To change the position of the Lenders' List control, simply drag and drop the control to the desired location.

6.6.2 Editing a Lenders' List

1. To edit a Lenders' List, click on the List of Lenders link on the home page of your iOffice under the Tools/Utilities section.

   You will see the following page:



   This page contains a ready list of lenders on the left hand side and a blank list where you can add your lenders for display on your site. The Add and Remove arrow buttons can be used to transfer names from the ready list to the one which you want to display on your site.

2. To add a lender to your list of lenders, select a name from the ones specified in the preloaded selection box. Select by merely clicking on the name and then click on the rightward pointing button to add that particular lender to your Lenders' List. If you added a lender by mistake, you can remove the name from the list by selecting it and clicking on the leftward pointing button.

3. If you want to add a lender to your list but the name does not exist in the predefined list of lenders, then you can manually add the name by entering it in the topmost field on the page. Enter the name of a bank or private lender and then click on the 'Add to List' link. The name you entered gets added to your Lenders' List.

4. To make changes to a name that you entered yourself as mentioned in Step 4, select the name from the Lenders' List and click on Edit. A small pop-up window will appear where you can re-enter or make changes to the name that you previously entered.
   Note: Please ensure that all popup blockers are disabled before trying this step.

5. You can delete a name that you entered by selecting the lender from your Lenders' List and clicking on the delete button. Please note that the delete function works only with values that you enter and not with the default values that pre-exist in the List of Lenders.

6. Once your list has been finalized, click on the Save button to save the list and return to the main page of your iOffice.

Changes made to any Lenders' List will be reflected universally on all the pages of your site that contain the Lenders' List.

6.6.3 Deleting a Lenders' List

1. From the Edit Pages mode, select the page from the drop-down page list from which you want to delete a Lenders' List.

2. Locate the Lenders' List on that page. Click on the Delete link located in the top right hand corner of the control.

3. A Delete clarification dialogue box will appear, confirming whether you want to delete the particular user control. Click on OK to delete the user control from the web page.

6.7 Contact Us

The Contact Us control adds the complete contact form to your web page. The Contact Us form is similar to the Quick Contact form but includes several additional fields in order to get more details from the user.

This section will guide you on how to:

Note: The Contact Us control is a form and hence cannot be edited.

6.7.1 Adding a Contact Us form to your website

1. Go to the Edit Pages feature within the Edit Site section.

2. In the Edit Pages mode, select the page where you want to add the Contact Us form from the drop down menu and click on the Add Content button at the top of the page.

3. On the Add Content page, you will see a list of user controls. Select the check box next to the Contact Us control under the second column of 'Add Other Feature'.

4. Select where you want the control to be placed from the drop-down menu.

5. Click on the Next button to go back to the Edit Pages page. Your new Contact Us form will be visible either in the right or center panel, depending on where you placed it.

6. To change the position of the Contact Us form, simply drag and drop the control where you want it.

6.7.2 Deleting a Contact Us form

1. From the Edit Pages mode, select the page from the drop-down menu from which you want to delete the Contact Us form.

2. Locate the Contact Us form on that page and click on the Delete link in the top right hand corner of the control.

3. A Delete clarification dialogue box will appear, confirming if you want to delete the particular user control. Click on OK to delete the user control from the web page.

6.8 Apply Now (Online Application Form)

The Apply Now user control adds an online application form to the web page of your choice. The detailed online application form is a great means of generating more leads. The form collects all the necessary information from the user, including basic contact details, information about assets currently owned and the liabilities that have to be paid off.

This section will guide you on how to:

6.8.1 Add an Online Application Form to your website.
6.8.2 Delete an Online Application Form from your website.

Note: The Apply Now control is a form and hence cannot be edited.

6.8.1 Adding an Online Application Form to your website

1. Go to the Edit Pages feature within the Edit Site section.

2. In the Edit Pages mode, select the page where you want to add the application form from the drop down menu and click on the Add Content button at the top of the page.

3. On the Add Content page, you will see a list of user controls. Select the check box next to the Apply Now control under the second column of 'Add Other Feature'.

4. Select where you want the control to be placed from the drop-down menu.

5. Click on the Next button to go back to the Edit Pages page. Your new online application form will be visible either in the right or center panel, depending on where you placed it.

6. To change the position of the application form, simply drag and drop the control where you want it (center or right panel only).

6.8.2 Deleting an Online Application Form

1. From the Edit Pages mode, select the page from the drop-down menu from which you want to delete the Online Application form.

2. Locate the Online Application form on that page and click on the Delete link in the top right hand corner of the control.

3. A Delete clarification dialogue box will appear, confirming if you want to delete the particular user control. Click on OK to delete the user control from the web page.

Note: Since the Online Application Form is very lengthy and with multiple fields, it is advisable to keep this as the only control on a particular page. You can, however, have text preceding the form using a custom content control.

6.9 Calculators

With your iToolpro Mortgage website, you can give your users access to up to five different calculators (for Plus Members only). These mortgage calculators allow the users to make basic calculations regarding their loan and help them initiate the mortgage application process once they have a clear idea of their present financial standing.

The mortgage calculators can be added to any page of your website. They cannot be modified in any way but can be removed from the page. There are 5 calculators offered on the iToolpro Mortgage website (5 for premium users, 2 for free subscribers):

1. Mortgage Loan Payment Calculator
2. Monthly Mortgage Payment Calculator
3. Rent Vs. Buy Calculator
4. Mortgage Qualification Calculator
5. Refinance calculator

A detailed look at the functional aspect of each of these calculators is given in the separate section on calculators, later in this guide.

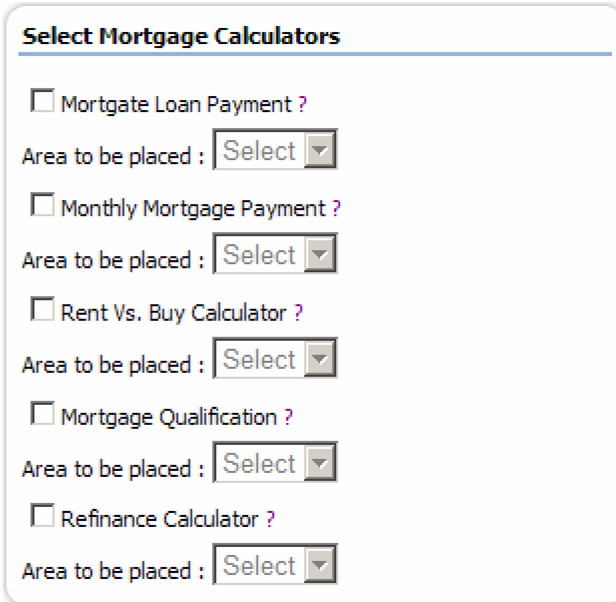
This section will guide you on how to:

6.9.1 Adding a Calculator to your Website

1. Go to the Edit Pages feature within the Edit Site section.

2. In the Edit Pages mode, select the page where you want to add a Calculator from the drop down page list and click on the Add Content button at the top of the page.

3. On the Add Content page, you will see a list of user controls. The third column of Select Mortgage Calculators will have a list of available calculators.



Select the calculator(s) that you want to place on the web page and specify each calculator's placement, i.e. at the center of the page or in the right column.

4. Once the selection is made, click on the next button to view your page in the edit website mode. Your calculators will appear in the form of links on the page.

5. You can move the calculators around the page by using the drag and drop mechanism.

6.9.2 Deleting a Calculator

1. From the Edit Pages mode, select the page from the drop-down page list from which you want to delete a calculator.

2. Locate the calculator on that page and click on the Delete link located in the top right hand corner.

3. A Delete clarification dialogue box will appear, confirming whether you want to delete the particular calculator. Click on OK to delete the user control from the web page.

3. Standard Pages

When adding a new page to your website, you get certain predefined pages with a particular form or function that can be directly added to your website without customization. These pages can later be modified according to your needs by adding more controls and changing the textual content. Many of the standard pages are already present in your website when you first sign up. In the event of a page being deleted, it can be added again if required using the Add New Page option in the Edit Pages feature. The following is the list of standard pages that are available in your iToolPro Website:

1. Home Page
2. About Us
3. Refinance
4. Purchase
5. Calculators
6. Check Loan Status
7. Rate Alert
8. Our Rates
9. Rate Advisor
10. Pre Qualify
11. Our Services
12. Location
13. Apply Now
14. Affiliate Information
15. Quick Application
16. Home Purchase
17. Home Equity (Paid Version Only)
18. Renewals (Paid Version Only)
19. FAQs
20. Contact Us

Note: Only one instance of a standard page can exist on the website at a time. The pages already existing on the website cannot be selected when adding a new standard page.

4. Our Rate

The Our Rate feature (known as the Personalized Rate Sheet in the iOffice) lets you display a comparative chart showing the difference between the current market rates and the rates offered by you.

The Our Rate section allows you to show your visitors that the rates that you offer are truly competitive, offering your clients a more feasible option for their mortgage needs.

'Our Rate' can be accessed from the iOffice main page. The table contains three columns, namely Term, Market Rate and Our Rate. Changes can be made only to the Our Rate column. The Market Rate is updated automatically each day. For details on how to add this feature to your web pages, please refer to the Personalized Rate Sheet section under User Controls.

Our Rates

Term	Market Rate	Our Rate
6 Months	5.4%	5.4%
1 Years	6.8%	6.8%
2 Years	7%	7%
3 Years	7.25%	7.25%
4 Years	6%	6%
5 Years	6.5%	6.5%
6 Years	7.3%	7.3%

5. Lenders’ List

The Lender’s List is a user control that allows you to display a list of your affiliated lenders and lending institutions on your website. The Lender’s List can be added to any page of your website and serves as a brand building tool. Having affiliations with reputed lenders will instill greater levels of confidence within your clients.

The Lenders’ List option can be accessed from the home page of your iOffice or from the Tools/Utilities section. For details on how to add and edit this feature on your website, please refer to the Lender’s List section under User Controls.

6. Leads

Leads are the basis of any mortgage business. The more leads a mortgage agent has, the more are the chances of him converting them to sales. To help manage your business better, your iToolPro Website comes with a complete Leads Manager.

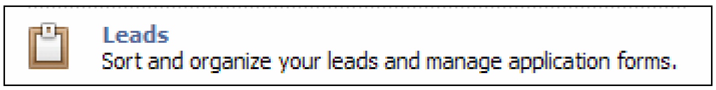
Your website has several forms that users will fill up in order to get more information about their mortgage. Every time a form is submitted on your website, it is registered in your database as a new lead. Your Leads Manager will help you keep track of these new leads so that your business works in a more efficient manner.

This section of the guide will give you an in depth look into the functioning of the Leads section of your site. This chapter will cover the following topics:

6.10 Leads Manager

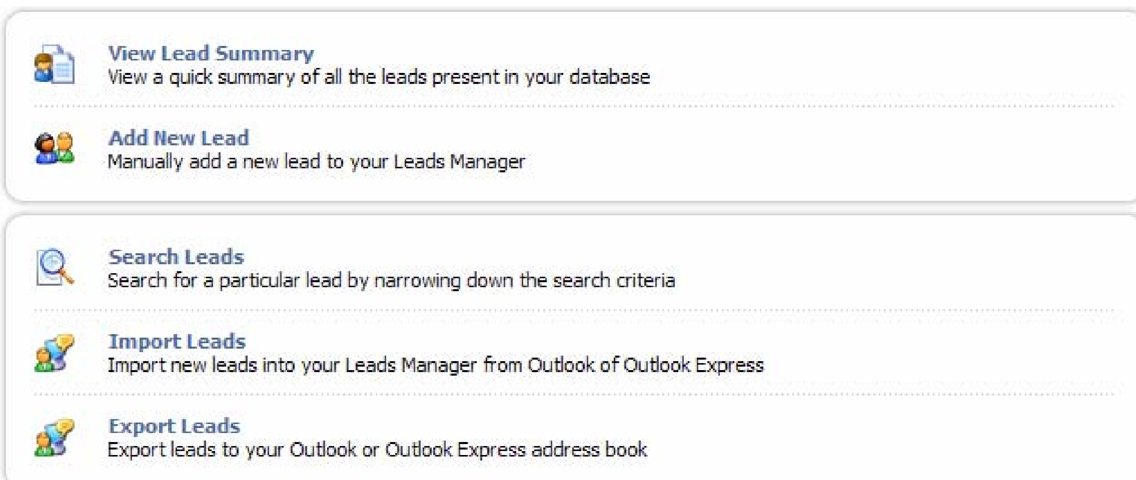
The Leads Manager is the main console of the leads section of your iOffice from where you can add, edit and delete leads.

- To access your Leads Manager, click on the Leads link on the home page of your iOffice.



- Alternatively, you can also click on the Leads link in the top link panel.

- The main page of your Leads Manager will display the different functional links that are available within the Leads menu.



- Each of these links will take you to a separate section from where you can work with your database of leads.

6.11 View Lead Summary

The View Lead Summary option allows you to view a quick summary of all your leads and their basic contact information. You can also make changes to a particular lead by using one of the several options given in the summary table.

Name	Date	Web Page	Email Address	Phone	Delete	Edit	Application	Update Loan
Yearwood,Linda	12/27/2006	Quick Application	linda_y@domainname.com	(514)-876-4078(H)				
Jones,Peter	12/27/2006	Renewals	peter_jones@domainname.com					
Smith,John	12/27/2006	Contact us	jsmith@domain.com					

The Lead Summary table consists of 4 editing options:

1. Delete
2. Edit
3. Application
4. Update Loan

Each of these options has been explained in detail in separate sections under this topic.

6.12 Add a new Lead

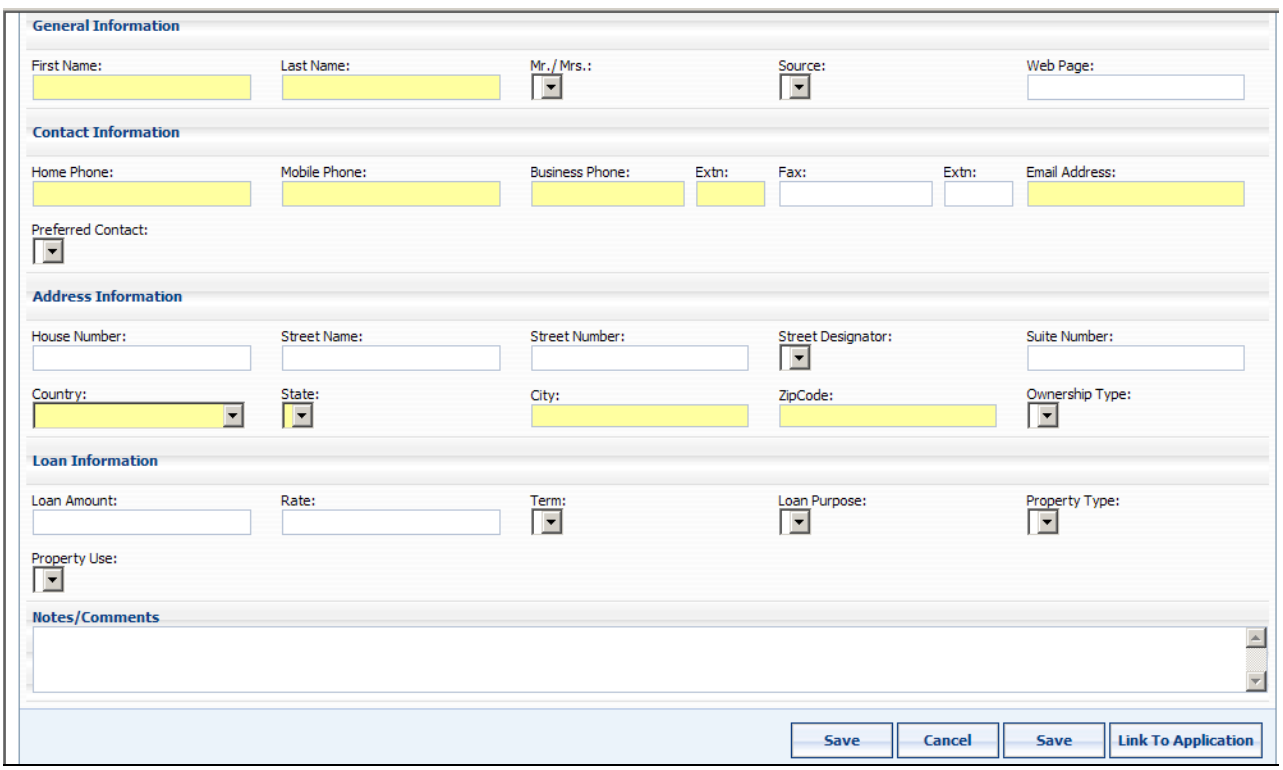
The Add New Lead option allows you to manually add new leads into your database. Basic subscribers can add 5 additional leads whereas Plus subscribers do not have any such restrictions.

To add a new lead to your database, follow these steps:

- Click on the Add New Lead link on the main page of your Leads.

Alternatively, you can also click on the Add New Lead link in the sub-link section under the Leads tab.

- The following screen will be displayed where you can enter general information about the lead along with contact details and basic loan information.



- Enter the details as per your requirement and click on the Save button to add the new lead.

- The new lead will be added to your database and will be visible in the View Lead Summary section.

6.13 Update Loan Information

The Update Loan Information section is applicable to only those leads that have submitted the Online Application Form. This section of your Leads Manager allows you to update the loan information of the applicant and post it back on your website.

1. To locate a lead that has filled in the Online Application form, check the Web Page column under Lead Summary table. This column displays the source of the lead. Only those leads received from the Apply Now or Quick Application section can be edited using Update Loan Information.

2. If you select a lead that has not been received from either of these two pages, clicking on the Update Loan Information link will give you an error page saying that the record has not applied for a loan.

3. Once you select an appropriate lead and click on the Update Loan Information link in the left panel, the lead's application form will open up for editing. You can make the required changes to the loan application and then either save the changes for your own reference or post them on your website for the applicant's benefit.

6.14 View Application Form

The View Application Form option allows you to view all the details of a particular lead's loan application. This feature is similar to the Update Loan Information section covered earlier in the guide but does not allow you to make changes to the person's loan application.

1. To view a particular lead's loan application form, locate a lead which has Apply Now or Quick Application mentioned next to it in the Web Page column of the Lead Summary.

2. You can view the application form for only those leads that have filled either the detailed online application form or the shorter quick version. Selecting any other lead would give an error message saying that an application form is not available.

3. Once you have selected an appropriate record, click on the View Application Form link in the left panel to view the details entered by the applicant.

6.15 Enter a New Application

The **Enter a New Application** option under the Leads section of your iToolpro Mortgage website allows you to manually enter the loan details of a particular lead into your database. A new lead will automatically be created whenever you personally fill up an application form. To manually enter the details of an applicant in the application form, follow these steps:

1. Click on the Leads link in the primary link panel of the iOffice. Click on the **Enter a New Application** link in the secondary link panel of the Leads section.

2. The detailed Online Application Form will open up. Enter the required information in the fields provided. The mandatory fields are marked by a red asterisk. These fields need to be filled up in order to complete the application process.

3. Once all the borrower and co-borrower (optional) information has been entered, click on the Send Application button to complete the process.

4. A new lead will be generated in your Leads Manager and you will receive an email notifying you about the same.

6.16 Delete a Lead

- Select the lead you want to delete from your database from the Leads' Manager.
- Click on the 'Delete Lead' link in the lead link panel to delete the lead.
- A pop-up message will prompt you to confirm the deletion. Click on OK to delete the record.
- The record is permanently removed from your Leads Manager.

6.17 Link to Application

The Link to Application function allows you to import a particular lead's information into an Online Application Form. This feature allows you to manually enter a particular lead's details into an Online Application Form. Very often, you will receive leads from pages other than the Online Application Form. If at any future date you need to enter their loan information yourself, you can save time and effort by importing at least the basic information into the lengthy form.

On clicking the Link to Application button, all the fields that have been entered by the lead will be fetched into the corresponding fields in the Online Application Form. The other information will have to be entered manually. Click on the Send Application button once all the details have been entered.

6.18 Import Lead

The Import Lead option allows you to import contacts into your Lead's Manager from Microsoft Outlook Express or Outlook 2000/2003. This is a convenient way of building your database, instead of manually entering each record one at a time. To import leads into your Leads Manager, you will first have to create a .csv file using your mail client.

6.18.1 Creating a .csv file in Outlook Express

1. Open Outlook Express.

2. Go to File → Export → Address Book.

3. An Address Book Export Tool will open up. Select the **Text File (Comma Separated Values)** option and click on Export.

4. In the CSV Export box that opens up, click on Browse to specify the path where you want to save the .csv file. Give an appropriate file name (e.g. Outlook Express Contacts) and click on Save. Click on the Next button in the CSV Export box.

5. Select the fields that you wish to export and click on the Finish button. Your contacts will be saved in a .csv file in the location that you specified in the previous step.

6.18.2 Creating a .csv file in Outlook 2000/2003

1. Open Outlook 2000/Outlook 2003

2. Go to File → Import and Export

3. In the **Import and Export Wizard** that opens up, select '**Export to a File**' option and click on Next.

4. In the **Export to a File** box, select the **Comma Separated Values (Windows)** option and click on Next.

5. From the list of folders that appears, select the **Contacts** folder and click on Next.

6. In the following window, specify the file name and path where you want to save the .csv file (*e.g. C:\Documents and Settings\Administrator/My*

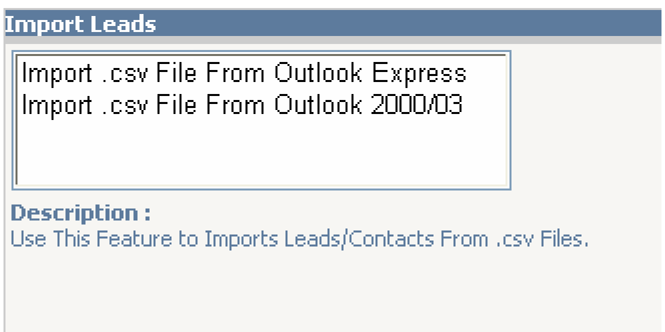
Documents/Outlook contacts.csv). Click on Next to proceed to the final step of the Export Wizard.

7. In the final window of the **Export Wizard,** you can select the fields that you want in the new .csv file that will be created. Click on the **Map Custom Fields** button to drag and drop the required fields from the 'From' and 'To' columns. Click on OK to save the changes made and close the Map Custom Fields window. Click on Finish to complete the export process. The new .csv file will be saved in the path specified.

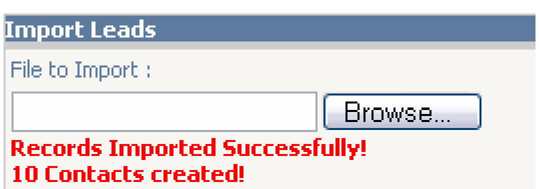
6.18.3 Importing Contacts into Your iOffice Leads Manager

1. Click on the **Import Lead** link in the secondary link panel of the Leads section of your iOffice.

2. Select the program from which you created the .csv file (Outlook Express or Outlook 2000/2003) and click on Next.



3. Locate and select the file you want to import using the Browse button. Click on Finish to import the contacts into your Leads Manager. The number of contacts imported will be displayed below the confirmation message.



4. The new imported contacts will be visible in the Leads Manager and can be viewed by clicking on the **View Lead Summary** link in the secondary link panel.

6.19 Export Lead

The Export Lead option allows you to export contacts from your **Leads Manager** into Outlook Express or Outlook 2000/2003. This makes it convenient to transfer your leads into your mail client.

6.19.1 Creating a .csv file in your Leads Manager

1. Click on the Export Lead link in the secondary link panel of the Leads section.

2. Select the program to which you want to export your iToolpro Mortgage website contacts (Outlook Express or Outlook 2000/2003). Click on Next to proceed.

3. Click on the Finish button to generate the .csv file. In the file download dialogue box, click on Save and specify the file name and the path where you want to save the .csv file. Remember the path as you will need to locate the file when importing into Outlook Express or Outlook 2000/2003.

6.19.2 Importing the .csv file into Outlook Express

1. Open Outlook Express

2. Go to File → Import → Other Address Book. The Address Book Import Tool will open up.

3. Select the **Text File (Comma Separated Values)** option and click on Import.

4. Select the .csv file that you generated through your iToolpro Mortgage website using the browse button and click on Next.

5. Using the checkboxes provided, map the fields that you would like to import into your Outlook Express address book. You can also leave the default settings if you are unfamiliar with the functionality of the field mapping process. Click on the Finish button to import the contacts into your Outlook Express address book.

6.19.3 Importing the .csv file into Outlook 2000/2003

1. Open Outlook 2000/2003.

2. Go to File → Import and Export. The Import and Export Wizard will appear.

3. Select the **Import from another program or file** option and click on Next.

4. In file type selection, select **Comma Separated Values (Windows)** and click on Next.

5. Select the .csv file generated through your iToolpro Mortgage website using the Browse button. You can also specify if you want duplicate entries to be created or overwrite the duplicate entries with new ones or exclude the duplicates altogether by selecting the appropriate radio button. Click on Next to proceed to the next step.

6. Select the folder where you want to import the contacts. In most cases, it will be the **Contacts** folder. Click on Next after selecting the desired location.

7. In the last section of the Import Wizard, you can specify the fields that will be imported using the **Map Custom Fields** button. You can also change the destination where you want to import the contacts using the **Change Destination** button. Click on Finish to complete the import process.

7. Loan Status Tracking

Clients who have filled the Online Application Form on your website can check the status of their loan by simply logging in to their individual loan accounts. iToolpro Mortgage's loan status tracking features allows users to check their loan status from time to time, as and when you update it.

The Check Loan Status page allows the user to enter their username and password that they received when they filled in the application form.

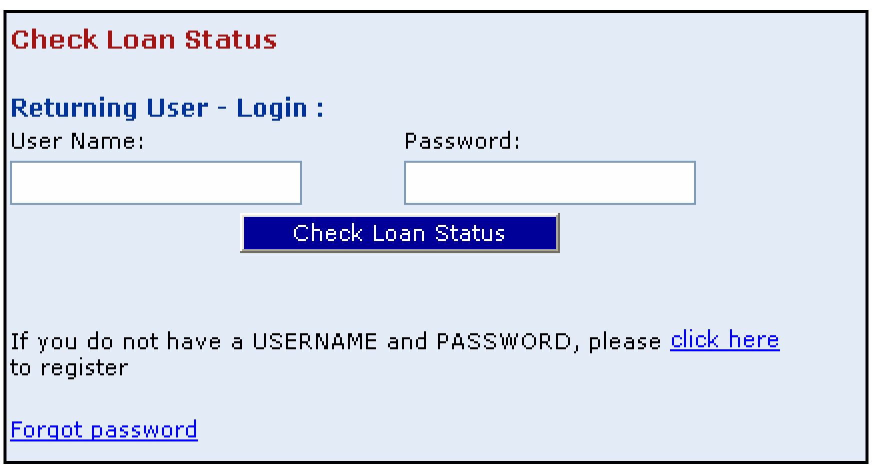
6.20 Check Loan Status

The Check Loan Status feature allows user to check the status of their loan once it has been updated by you. Every time you update the loan information of a lead, an automated mail is sent to him or her, notifying the person to check their loan status.

Using the username and password supplied during the Online Application process, they can sign into the Check Loan Status page and view their loan information.

6.20.1 Adding a Check Loan Status Page

- From the Add New Page option in Edit Pages, select Standard Page.
- On the next page, select the check box next to ‘Check Loan Status’ and click on Next.
- Your new Check Loan Status page is ready and added to your website. It can be customized or deleted using Edit Website.
- The Check Loan Status Page will have the following form:



6.20.2 Loan Status Report

- Once the user has logged into his or her account, the loan status will be displayed in the form of a ***Loan Status Report***.
- The report mentions all the different aspects of the loan such as loan amount, interest rate, monthly installments and the duration.

- The user can, then, either print the report or download a copy on the local machine, using the respective buttons provided at the bottom of the report.

8. Calculators

The iToolpro Mortgage website comes with 5 great mortgage calculators (2 for Basic members) that help your users calculate their mortgage details and decide whether going in for a mortgage is the right option.

The following 5 calculators are available for use on your website:

1. Mortgage Payment Calculator
2. Monthly Mortgage Payment Calculator
3. Rent vs. Buy Calculator
4. Mortgage Qualification Calculator
5. Refinance Calculator

6.21 Mortgage Payment Calculator

The Mortgage Payment Calculator can be used to generate an amortization schedule for your current mortgage. The calculator will give you quick results on how much interest you will have to pay and your principal balances. The Mortgage Payment calculator also determines the impact of any principal that is prepaid. Users can click on the View Report button for a detailed analysis of their mortgage and its payment schedule.

- The Mortgage Payment calculator can be found in the Calculators page of your website.

- To add the calculator to any other page of your website, please refer to the **Calculators** section under **User Controls**.

6.22 Monthly Mortgage Payment Calculator

The Monthly Mortgage Payment Calculator allows your users to either enter a loan amount and term and then calculate their monthly installments or enter the installment that they are comfortable paying and calculate the loan that they can avail of. The calculator will also give details about the total interest that will be incurred. Users can click on the View Report button for a detailed report on the data they entered and a monthly payment schedule for the set amount.

- The Monthly Mortgage Payment calculator can be found in the Calculators page of your website.

- To add the calculator to any other page of your website, please refer to the **Calculators** section under **User Controls**.

6.23 Rent vs. Buy Calculator

The decision to buy a new home or to continue living in a rented house requires a lot of consideration and proper calculations. Your investment in a new home should break even at the end of the amortization period else it is a futile exercise. Without proper calculations, you might end up incurring severe losses in the forms of property taxes and interest on the mortgage.

The Rent vs. Buy calculator will give your users a proper analysis of the two situations by comparing the details entered. The report generated will tell the users which of the two is the right decision by explaining all the influential factors. This way, your clients get a reassurance that they aren't being cheated into applying for a mortgage that they do not require.

- The Rent vs. Buy Calculator can be found in the Calculators page of your website.
- To add the calculator to any other page of your website, please refer to the **Calculators** section under **User Controls**.

6.24 Mortgage Qualification Calculator

The Mortgage Qualification Calculator lets the users determine their budget and gives them an idea of how much they can borrow. The calculation can be done based on their annual income, the purchase price or the total monthly payment that they are comfortable with. The View Report button gives a detailed analysis of the mortgage, including the yearly payment schedule.

- The Mortgage Qualification Calculator can be found in the Calculators page of your website.
- To add the calculator to any other page of your website, please refer to the **Calculators** section under **User Controls**.

6.25 Refinance Calculator

Refinancing can be a great option to save on a high-interest mortgage. The refinance calculator lets your users find out the interest that will be saved if they refinance with a new mortgage of a lesser interest rate. All they need to do is enter the details of the old mortgage and the terms of the new one, and the calculator will do the rest. The calculator will specify how much will be the monthly and total savings on the interest paid and will also give a detailed breakup of the monthly payments.

- The Refinance Calculator can be found in the Calculators page of your website.

- To add the calculator to any other page of your website, please refer to the **Calculators** section under **User Controls**.

9. Rate Advisor

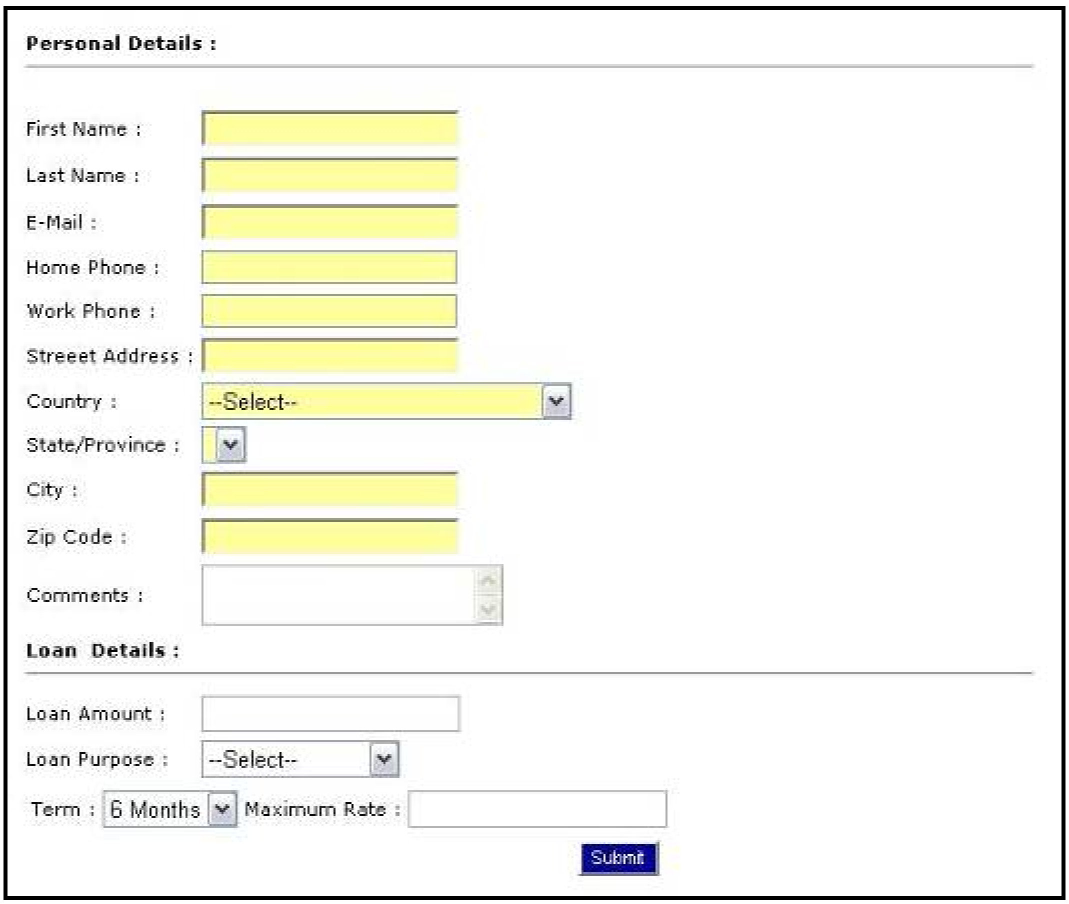
The Rate Advisor engine allows your users to search for the current market rates and the competitive rates offered by you. This tool helps your users find the right rate for their mortgage.

The Rate Advisor page is a **standard page** that comes with the default site. It consists of a short form in which the users have to enter their personal details and their loan requirements.

The Rate Advisor feature functions as a lead generation tool. Once the user has submitted his or her details, it is registered as a lead in your Leads' Manager. You can keep a follow-up with the person in order to convert the lead into a sale.

The automated system integrated into the Rate Advisor engine will send out a daily mail to the email address specified by the user. This mail will contain the day's market rate and the rate offered by you.

A sample Rate Advisor application form is given below



You cannot modify the Rate Advisor form. However, the content of the form can be customized according to your requirements. For details on how to delete, modify or add a Rate Advisor page that you have deleted, please refer to the Edit Website section.

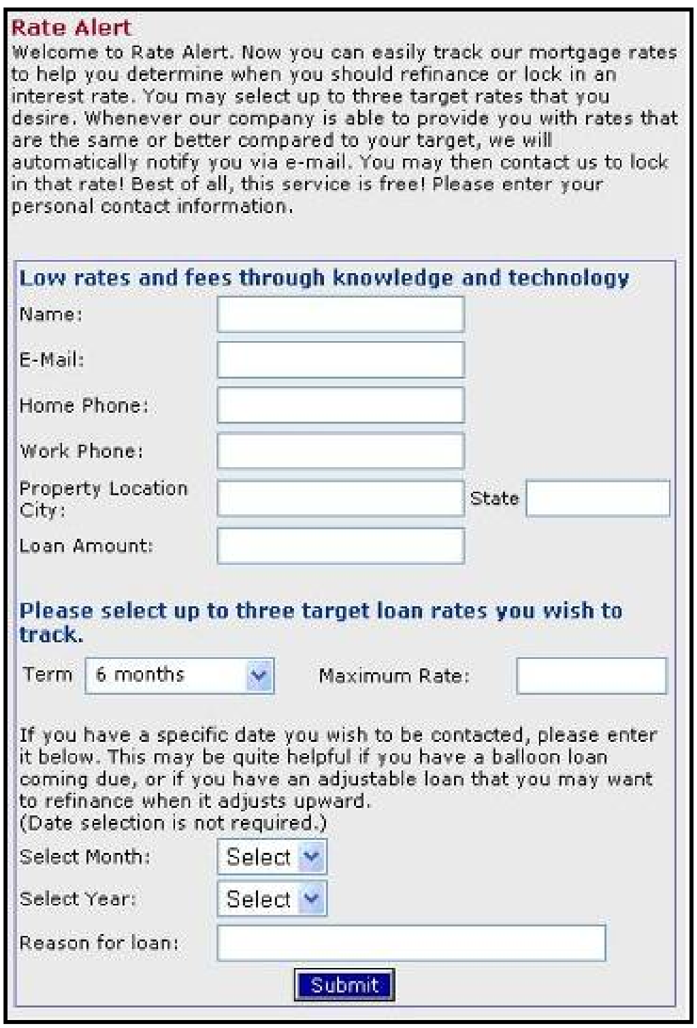
10. Rate Alert

Rate Alert is an automated system which sends an email to the user once the specified search criterions are met. This allows users to lock in a preferred rate and start the mortgage application process, thereby getting you another sale.

The Rate Alert page is a standard page that is integrated into the default site that you start off with. Like the Rate Advisor, Rate Alert also acts as a lead generation tool. Whenever a user enters his or her details in the form provided, it is registered in your Leads Manager as a new lead.

In the Rate Alert system, users have to specify the target rate that they require or a time period when they would like to consider a mortgage. When either or both of these criterions are met, the system automatically sends an email to the specified address, alerting the person about the rate.

A sample Rate Alert form is given below:



Rate Alert

Welcome to Rate Alert. Now you can easily track our mortgage rates to help you determine when you should refinance or lock in an interest rate. You may select up to three target rates that you desire. Whenever our company is able to provide you with rates that are the same or better compared to your target, we will automatically notify you via e-mail. You may then contact us to lock in that rate! Best of all, this service is free! Please enter your personal contact information.

Low rates and fees through knowledge and technology

Name:

E-Mail:

Home Phone:

Work Phone:

Property Location City: State

Loan Amount:

Please select up to three target loan rates you wish to track.

Term 6 months Maximum Rate:

If you have a specific date you wish to be contacted, please enter it below. This may be quite helpful if you have a balloon loan coming due, or if you have an adjustable loan that you may want to refinance when it adjusts upward.
(Date selection is not required.)

Select Month: Select

Select Year: Select

Reason for loan:

Submit

The Rate Alert form cannot be modified. You can, however, change the custom content above the form according to your requirement. The Rate Alert page can be deleted from your website. You can also add the page again and modify it by adding your own user controls. For more details, refer to the Edit Pages section.

11. iStats

The iStats section of your iToolpro Mortgage iOffice gives you graphical data about the various statistics of your site such as the daily, weekly and monthly hit count, most visited pages, errors if any and search engine statistics among other details.

The left panel of your iStats screen will have the various links to the different controls of your iStats tool. The right panel has features such as the calendar to set the time period for the statistical data, an options panel to specify the format of the graphical representation and other tools such as emailing or printing the report.

To go back to your iOffice, click on the ‘Home’ link in the page header.

12. Domain Store/Email

The Domain Store/Email feature of your iOffice lets you create a unique domain for your iToolpro Mortgage website and also allows you to create your own email id on that particular domain. You can create up to 5 additional email accounts on your domain, all of which can be managed from the Domain Store/Email section of your iOffice.

6.26 Creating your Domain

Your iToolpro Mortgage website allows you to create your own domain name by which people can recognize your website. The domain can be your name, your company's title or anything else that you desire. Follow these steps to create our own domain.

1. Click on the Domain Store/Email link in the primary link panel of your iOffice.

2. Click on the Register Domain link. Specify the domain of your choice and click on register. Your domain will be created after its uniqueness has been verified by our support team.

6.27 Working with your Mailbox

Once your domain is registered, you can access your personal mailbox. Your personal domain also allows you to create up to 5 additional mailboxes having the address user@domainname.com

- The first time you visit your mailbox, you will be asked to specify your time zone and configure your message settings. After specifying the settings, click on the Save link in the top right hand corner of the screen.
- You will be taken to the inbox of your screen, with the various other links such as contacts, calendar and tasks in the left panel.
- You can a read received mail or compose and send new ones from your mail client.

6.28 Creating Domain Users

1. Click on the Domain Store/Email link in the primary link panel of your iOffice. Click on the Create Domain Users link that appears

2. Enter the domain details of the individual you wish to add along with the mailbox space that you wish to allot. After entering all the details, click on the Save button to add the new users. You can add up to 5 additional users to your domain.

3. After a user has been added, the name and login details will appear in the Existing User List.