

## NYLX / Leads360 Integration Overview

The NYLX / Leads360 integration was developed to offer our clients the value add of having a seamless integration from their CRM to the NYLX.

This integration allows a user to take a lead file from Leads360 and transfer it into the NYLX for running eligibility and pricing, and have that information updated back into Leads360 to utilize along with the other features of their CRM.

The screenshot displays the Leads360 website interface. At the top, the logo features a target icon with an arrow and the text "LEADS360" in blue and orange, followed by the contact information "Contact us today! 1.888.508.4462". Below the logo is a navigation bar with five green buttons: "industries", "what we do", "about us", "talk to us", and "should we work together?".

The "industries" dropdown menu is open, showing four options: "mortgage" (with a house icon), "debt/credit" (with a credit card icon), "education" (with a graduation cap icon), and "insurance" (with a shield icon). The "education" option is selected, leading to a large banner for "EDUCATION".

The banner features a black graduation cap and a rolled-up diploma tied with a red ribbon. To the right of the image, the text reads: "EDUCATION" in large orange letters, followed by "Leads360 provides lead management software and services driven by industry best practices. We make leads more valuable™." and a "learn more" link with a right-pointing arrow.

Below the banner are three main content areas:

- ROI Calculator:** A section with a yellow input field at the top, followed by three rows of input fields labeled "Conversion Rate (%)", "Monthly Lead Volume", and "Revenue Per Deal", each with a question mark icon. A green "Calculate ROI" button with a plus sign is at the bottom.
- How It Works:** A section with a blue header, a text box saying "Watch our flash demo to see what lead management is and why you need it.", and an illustration of a modern office building. A "play now" button with a right-pointing arrow is at the bottom.
- Features:** A section with a blue header, an image of a laptop displaying a dashboard with charts and graphs, and the text "METRICS AND MILESTONES". "back" and "next" buttons with left and right arrows are at the bottom.

## Features of Leads360:



We make leads more valuable™. We help our clients turn leads into customers and identify which leads work best. It's pretty simple, here's a brief summary of how our software works and what our company can do for you:

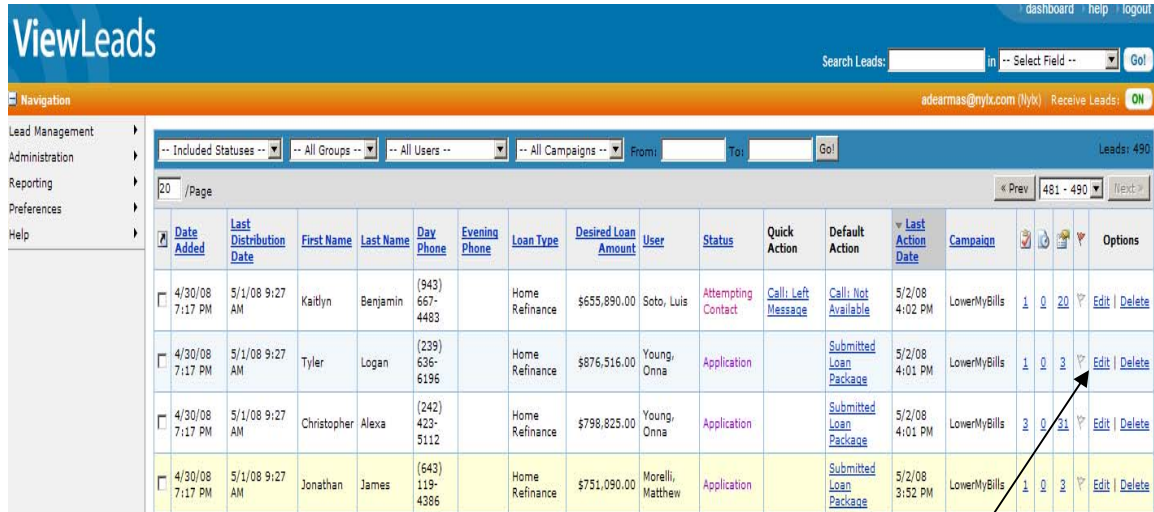
- First, your leads get instantly inserted into our lead management software.
- Then your sales agents login and leads are automatically assigned to them based on customized business rules.
- Next, as your agents work, their activity is tracked in real time.
- Your managers monitor progress and analyze performance metrics.
- Leads that aren't ready to convert are nurtured with automated emails until they're ready.
- As leads are converted into deals they are automatically sent to your backend software for fulfillment.
- Finally, you can view reports to understand your marketing ROI, sales performance, and improve your business.
- Best of all, we don't just give you the software; we actually show you how to use it. Our dedicated Professional Services team will help you through training, implementation, adoption, optimization, growth, reorganization, and any other issues that may arise.

- [Professional Services](#)
- [Lead Integration](#)
- [Lead Acquisition](#)
- [Lead Routing](#)
- [Lead Management](#)
- [Lead Tracking](#)
- [Lead Nurturing](#)
- [Scoring & Ranking](#)
- [Lead Analytics](#)
- [Integrated Dialer](#)
- [DNC Scrubbing](#)
- [Integrated Services](#)

How does a user get into NYLX from Leads360?

The integration begins and ends inside of Leads360 – a file cannot be originated in the NYLX.

The originator begins with the Lead File in Leads360:

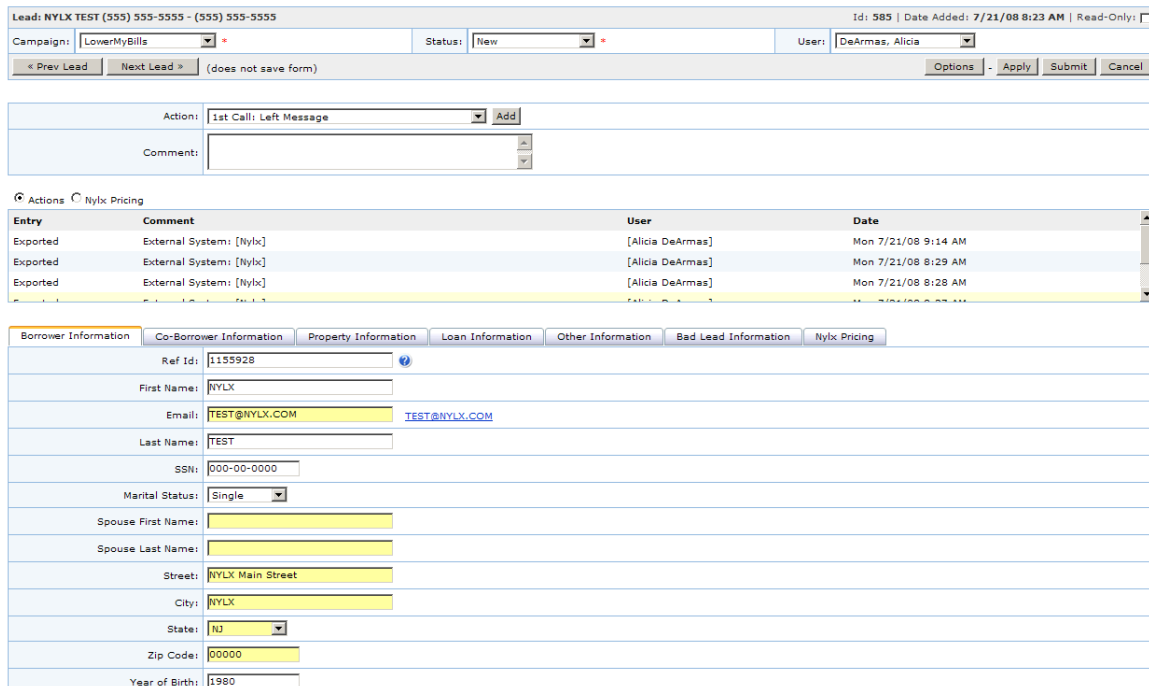


The screenshot shows the 'ViewLeads' dashboard with a navigation menu on the left and a search bar at the top. Below the search bar is a filter section with dropdowns for 'Included Statuses', 'All Groups', 'All Users', and 'All Campaigns'. A table of leads is displayed with columns: Date Added, Last Distribution Date, First Name, Last Name, Day Phone, Evening Phone, Loan Type, Desired Loan Amount, User, Status, Quick Action, Default Action, Last Action Date, Campaign, and Options. The first lead row is highlighted, and an arrow points to the 'EDIT' button in the 'Options' column.

Date Added	Last Distribution Date	First Name	Last Name	Day Phone	Evening Phone	Loan Type	Desired Loan Amount	User	Status	Quick Action	Default Action	Last Action Date	Campaign	Options
4/30/08 7:17 PM	5/1/08 9:27 AM	Kaitlyn	Benjamin	(943) 667-4483		Home Refinance	\$655,890.00	Soto, Luis	Attempting Contact	Call: Left Message	Call: Not Available	5/2/08 4:02 PM	LowerMyBills	1 0 20 Edit Delete
4/30/08 7:17 PM	5/1/08 9:27 AM	Tyler	Logan	(239) 636-6196		Home Refinance	\$876,516.00	Young, Onna	Application		Submitted Loan Package	5/2/08 4:01 PM	LowerMyBills	1 0 3 Edit Delete
4/30/08 7:17 PM	5/1/08 9:27 AM	Christopher	Alexa	(242) 423-5112		Home Refinance	\$798,825.00	Young, Onna	Application		Submitted Loan Package	5/2/08 4:01 PM	LowerMyBills	3 0 31 Edit Delete
4/30/08 7:17 PM	5/1/08 9:27 AM	Jonathan	James	(643) 119-4386		Home Refinance	\$751,090.00	Morelli, Matthew	Application		Submitted Loan Package	5/2/08 3:52 PM	LowerMyBills	1 0 3 Edit Delete

Then opens one Lead file by clicking the “EDIT” tab on the right side of screen.

This opens the individual Lead file with all the information either entered manually by the originator or imported from an external source through Leads360 services.



The screenshot shows the 'Lead: NYLX TEST (555) 555-5555 - (555) 555-5555' form. It includes fields for Campaign (LowerMyBills), Status (New), and User (DeArmas, Alicia). Below the form are sections for 'Action' (1st Call: Left Message) and 'Comment'. A table of actions is shown, and a 'Borrower Information' tab is selected, displaying fields for Ref Id, First Name, Email, Last Name, SSN, Marital Status, Spouse First Name, Spouse Last Name, Street, City, State, Zip Code, and Year of Birth.

Entry	Comment	User	Date
Exported	External System: [Nylx]	[Alicia DeArmas]	Mon 7/21/08 9:14 AM
Exported	External System: [Nylx]	[Alicia DeArmas]	Mon 7/21/08 8:29 AM
Exported	External System: [Nylx]	[Alicia DeArmas]	Mon 7/21/08 8:28 AM

**Borrower Information**

Ref Id: 1159928

First Name: NYLX

Email: TEST@NYLX.COM

Last Name: TEST

SSN: 000-00-0000

Marital Status: Single

Spouse First Name:

Spouse Last Name:

Street: NYLX Main Street

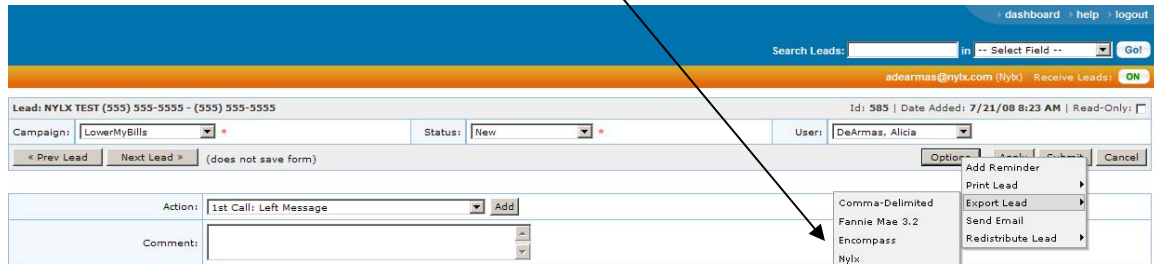
City: NYLX

State: NJ

Zip Code: 00000

Year of Birth: 1980

Once the file is opened, the originator can choose to “push” the file into the NYLX by clicking the “Options” button and then scrolling down to the Export Lead section and choosing the NYLX.



This will log the user directly into the NYLX (the user does not have to input their NYLX login information each time, this is setup when the account is first setup with the NYLX)

The file is then uploaded into the NYLX (note: if this is the first time the file is uploaded, it will “create” the loan in the NYLX, if it is after the file has been uploaded previously, it will update the existing file in the NYLX and not create a new file.)

The user follows the standard NYLX process for pricing loans until they are at the pricing details page.

- Loan Application
- Credit Report
- View Guidelines
- Pre-Approval Letter
- Good Faith Estimate
- Loan Status
- Lock Form
- Borrower Ratios
- Reprice
- Fannie Mae Export
- Fannie Mae Import

[Printer Friendly Version](#)   [Print Lock Information](#)

**NYLX TEST (1 of 2 previous next)**

**NYLX Main Street**

**NYLX, NJ 00000**

**555-555-5555**

**TEST@NYLX.COM**

**Program Warning Message: Maximum qualifying DTI of 36% may only be exceeded with an acceptable AUS certificate.**

This loan was last submitted to Leads 360 on: 07/21/2008 12:10 PM

[Resubmit to Leads 360](#)

**LEADS360**  
We make leads more valuable.

Once on the pricing details page – the user can choose to Submit the loan data back to Leads360 (or Resubmit for loans that have been exported previously.)

Once the file is updated to Leads360 – the user can see the history of pricings by clicking on the “NYLX PRICING” tab.

Actions NYLX Pricing

Date	Lender	Loan Program	Lock Days	Price	Options
7/21/2008 9:51:17 AM	Countrywide	Countrywide - Conf 30 Yr Fixed Full Doc	30	101.1220	<a href="#">Add Pricing Data to Lead</a>   <a href="#">Details</a>
7/21/2008 9:16:06 AM	Wells Fargo	Wells Fargo - Conf 30 Yr Fixed Full Doc	30	102.9720	<a href="#">Add Pricing Data to Lead</a>   <a href="#">Details</a>
7/21/2008 8:36:04 AM	Astoria Federal Savings	Astoria Federal Savings - Portfolio 5/1 T-Bill ARM Full Doc	30	100.7500	<a href="#">Add Pricing Data to Lead</a>   <a href="#">Details</a>

The originator can choose which program/rate to assign to the file by clicking the “Add Pricing Data to Lead” link.

Each time the file is sent back to the NYLX for pricing, the new rates / programs are stored in Leads360 so that the originator can view a complete history of all quotes supplied to the potential borrower.

Changes in Leads360 are only updated to NYLX when/if the user follows the steps to re-export the file back to the NYLX from Leads360 and the clicks the Update Leads360 button from the Pricing Details page to send the information back into the Lead Manager system in Leads360.

For additional information please contact:

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