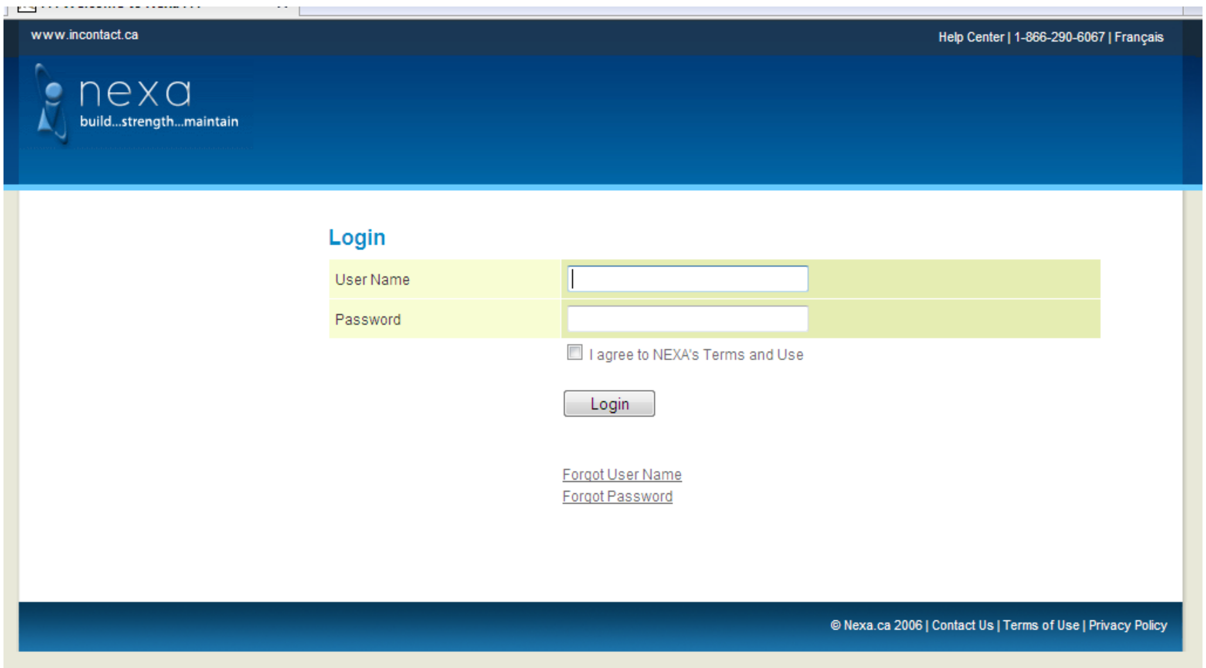
Getting started with Nexa
Welcome Manual

Table of Contents

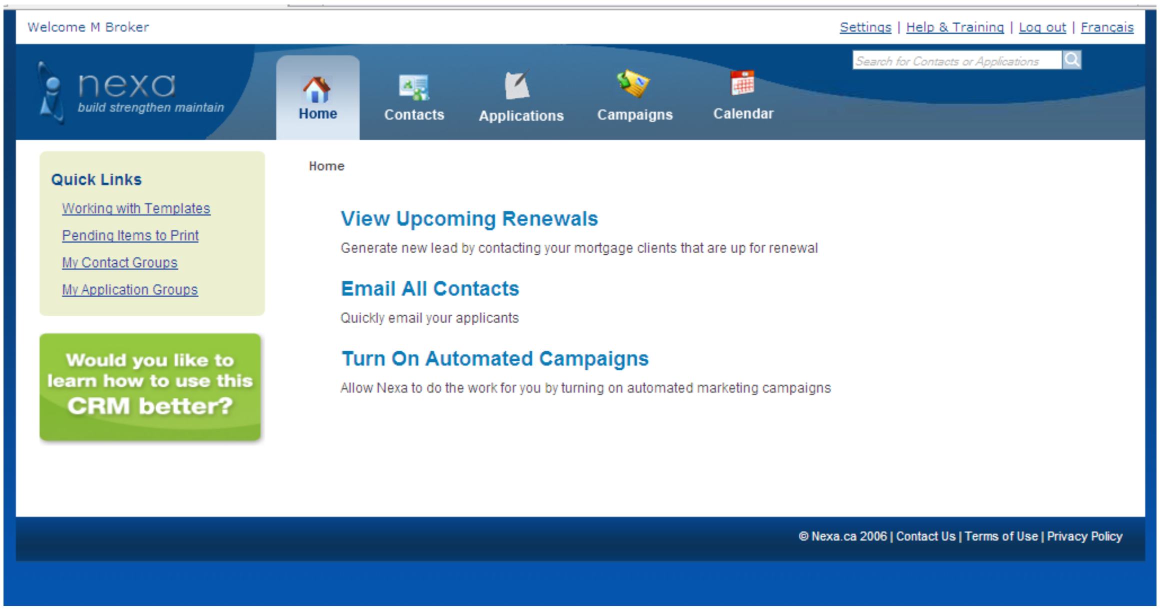
Logging in

To log into Nexa enter the user name and password that were emailed to you. Click the checkbox to agree to the use and terms of the system. Click "Login".



Working with your homepage

When you have logged into Nexa the first screen you see is the home page or "dashboard". This screen contains links into the application to help you quickly move to the section, task, or function you wish to access.



Along the top navigation bar are many tabs that will take you to various areas of Nexa.

The ***Contacts*** and ***Applications*** tabs are where you will see your Expert data.

In ***Campaigns,*** you can set up automated actions. An action can be an email to your contacts, a printed piece or a notification to yourself.

Under the ***Calendar*** tab, you can add appointments and view a calendar on a monthly, weekly or daily basis.

Synchronizing with Expert – Data updated in Nexa

After inputting your Nexa identifier into Expert, the data that you see in Expert will automatically populate into your Nexa account. The data in Nexa will update from Expert every two hours so that your Nexa database is always up to date. Any changes or additions made to an application in Expert will update in Nexa the next time it updates.

Changes made in Nexa will not show in Expert. Any changes to the application need to be made in Expert and that change will update in Nexa the next time it updates.

If you wish to make changes in Nexa and do not want the data overwritten with information coming from Expert, you have the option to mark that application as 'Do not synch with Expert'. To do this view the application or contact you do not want updated. Under the heading Synchronize, remove the check mark from the field "Synch with Expert?" and save the changes. The application will no longer update with information from Expert.

Contacts vs. Applications

When an application uploads from Expert into Nexa, the information splits into Contacts and Applications.

The Principal Applicant, Co-Applicants and any other participants on the application show as separate records under the 'Contacts' section of Nexa. In this section of Nexa, you will see the clients contact information, personal details, employment details, applications belonging to the contact as well as an activity section where notes can be added to each contact.

All new contacts are given a Contact Type. The Contact Type is used to differentiate between applicants or participants on the applications.

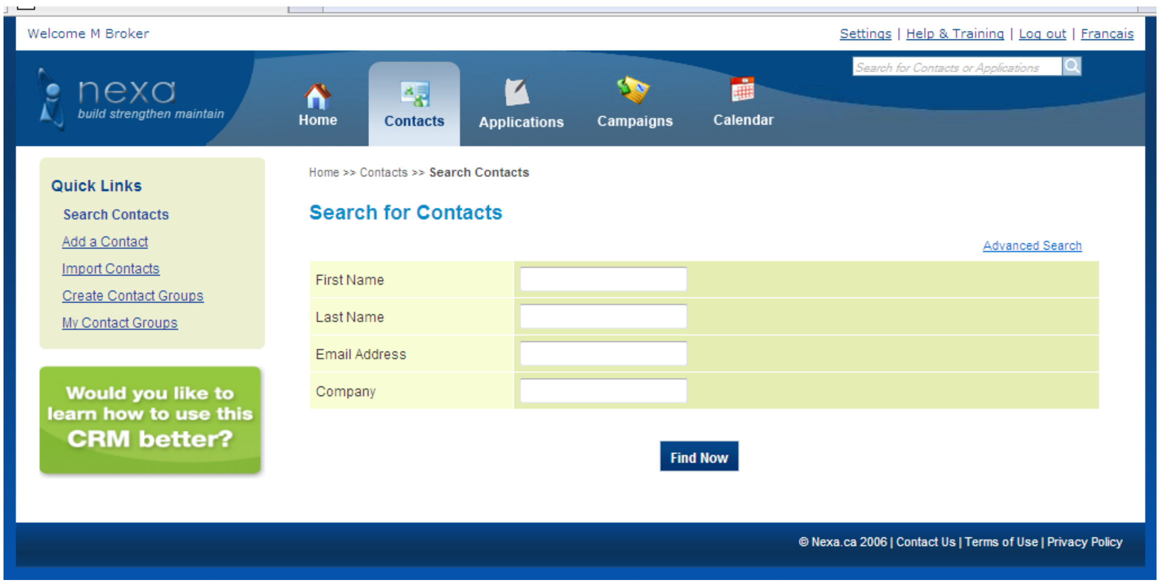
The 'Application' section of Nexa will contain all of the Mortgage Details.

Searching Contacts – Simple Search

There are two options when searching for a contact. The first is a quick search that allows you to type in the contacts first or last name, email address or company.

Select 'Contacts' on the top navigation bar.

Click 'Search for Contacts'.



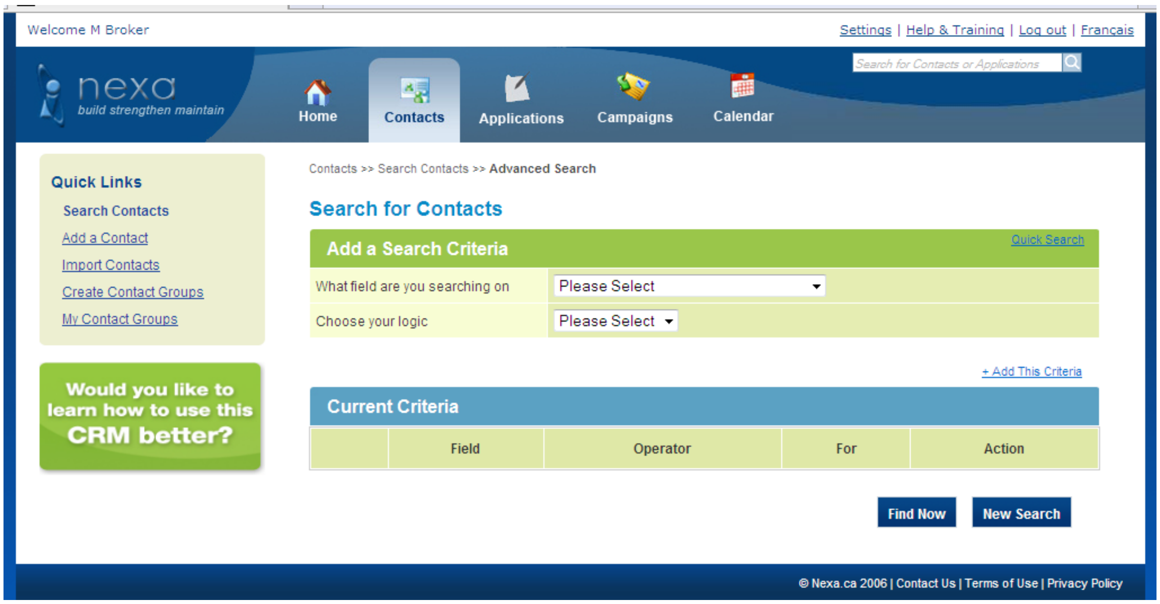
Enter the first name, last name, email address or company. Click Find Now.

The results of your search will be displayed.

Searching Contacts –Advanced search

Using the "Advanced Search" section, you can build a search by choosing any field on the contact record to search on.

Click on the "Contacts" tab, then 'Search for Contacts'.
Click on the 'Advanced Search' link.



To create your search you must fill in 3 pieces of information. The field you are searching on, the logic of your search and what you are looking for.

For example, if you were searching for all Contacts whose First name begins with the letter A. The Field would be "First Name", the logic in this example is "begins with" and 'What you are looking for' would be "A", the first letter of the name.

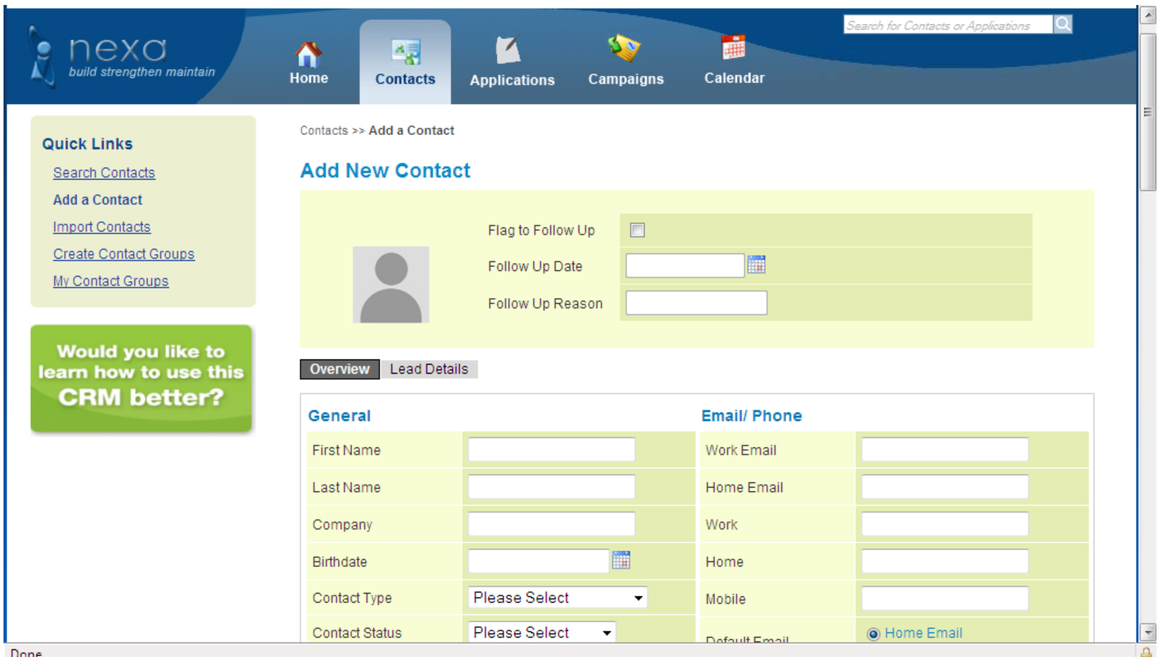
When you have entered the 3 criteria, click "+ Add this Criteria". This button allows you to save the criteria and moves it to the section below called "Current Criteria". At this point you can click on "Find Now" to search based on this criteria or your can build another criteria to narrow down you search.

The results of your search will be displayed.

Adding a Contact

If you would like to track or work with Contacts that are not in Expert you can do so by adding a new contact.

Select ‘Contacts’ on the top navigation bar and then ‘Add a Contact’.



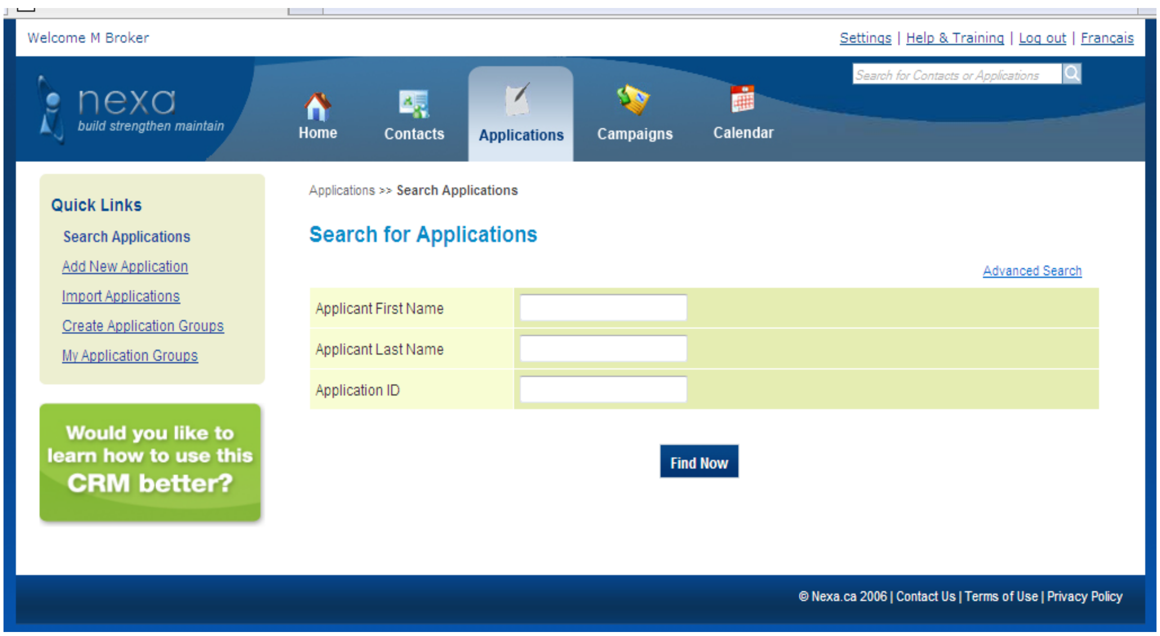
Fill in the Contact information and click ‘Add Contact’ at the bottom of the screen.

Searching Applications – Simple Search

There are 2 options when searching for applications. The first is a quick search that allows you to type in the applicants first or last name or the Application ID.

Select 'Applications' on the top navigation bar.

Click on ' Search for Applications'.

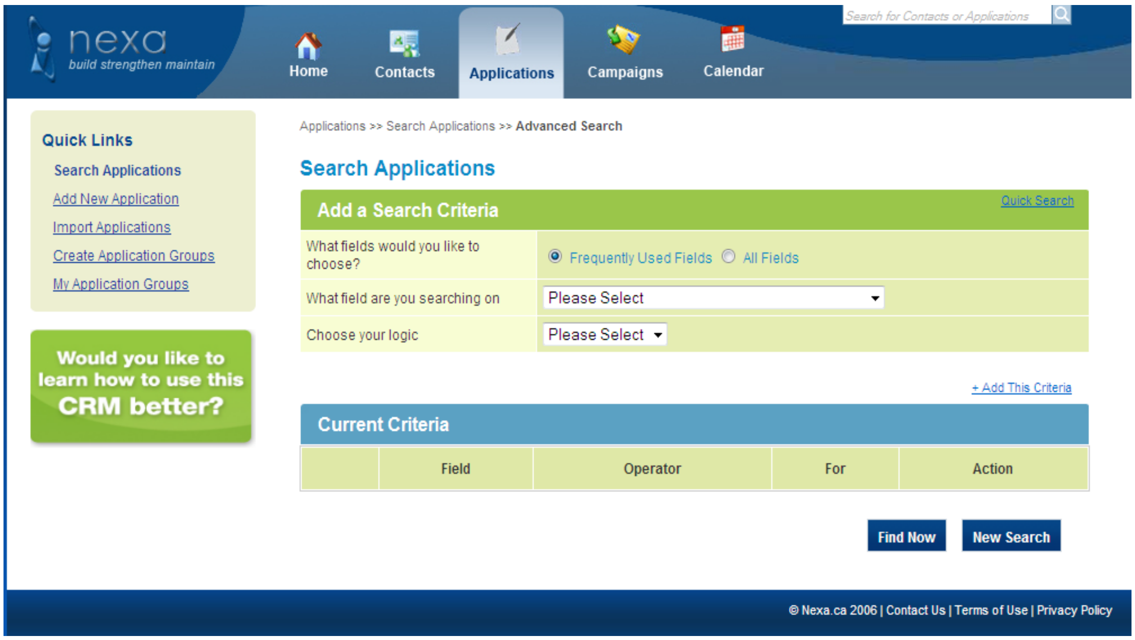


Type in the First Name, Last Name or Application ID in the correct field and click 'Find Now'.

The results of the search will be displayed.

Searching Applications – Advanced Search

The Second option is to create a more detailed search by selected any field on the application to search on. Click on the “Applications” tab, then ‘Search for Applications’. Click ‘Advanced Search’.



To create your search you must fill in 3 pieces of information. The first is the ‘Field you are searching on’. From the drop down menu, select the field that you want to search. If the field you want to search on is not in the drop down list, select the ‘All Fields’ button in the ‘What fields would you like to choose’ option above. Choose your logic and type in what you are looking for.

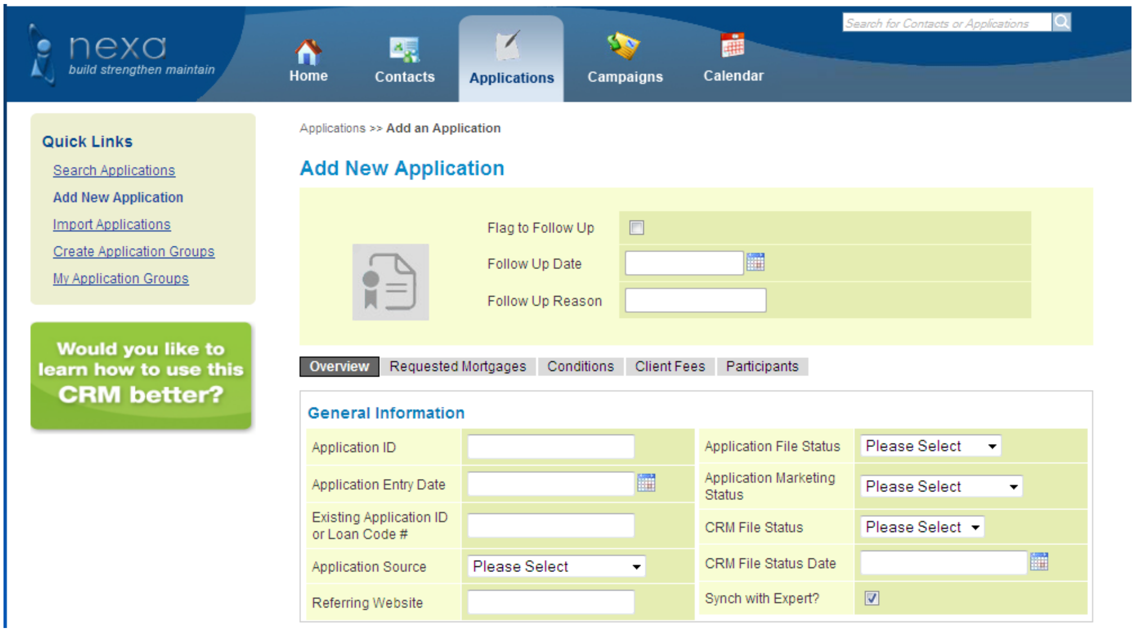
For example, if you were searching for all Applications with a property address on Main St. The Field would be “Property Street Name”, the logic in this example is “equal to” and “What are you are looking for’ is ‘Main St’

When you have entered the 3 criteria, select “+ Add This Criteria”. This button allows you to save the criteria and moves it to the section below called “Current Criteria”. At this point you can click on “Find Now” to search based on this criteria or you can build another criteria to narrow down you search.
The results of your search will be displayed.

Adding an Application

If you would like to track or work with Applications that are not in Expert you can do so by adding in a new application.   Select "Applications" on the top navigation bar.

Click "Add New Application".



Fill in the application information and click "Add Application" at the bottom of the screen.

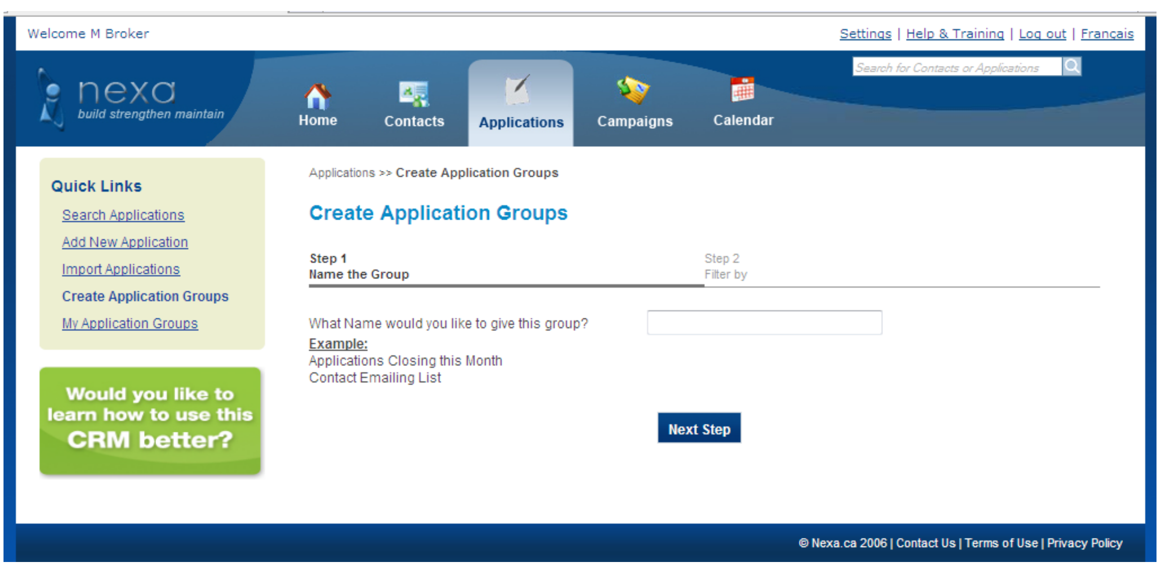
Creating a new Group

Groups allow you to view numerous contacts or applications together. Creating a group is completed by working through a 2-step wizard.

You must first decide if your group will be build using Contact information or Application information. For example, if you want to create a group of all clients with a birthday next month. You only want the client to appear in the group once even if they have 3 or 4 mortgages with you. Your birthday group will be built under Contacts. On the other hand, if you want a group of all maturities, the maturity date is information contained in the application section of Nexa so your group will be built under Applications.

On either the “Contact” or “Applications” tab, click on “Create a new group”. You can also use the links on the left “Create Application Groups” or “Create Contact Groups” to get to the same wizard.

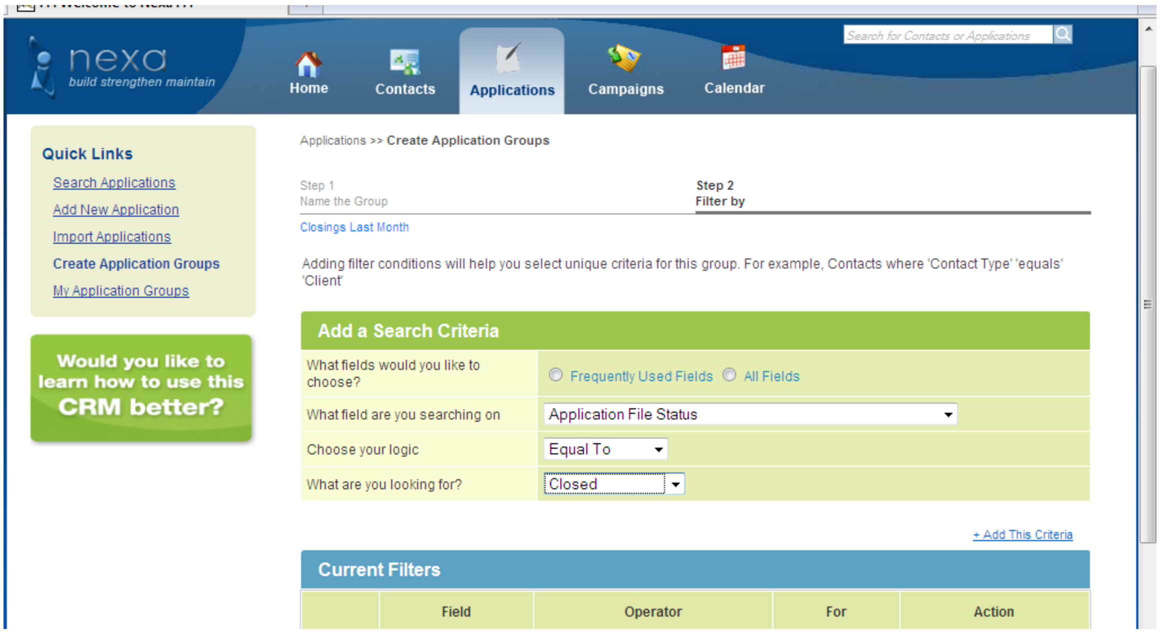
In Step 1 give your group a name, make it as descriptive as possible.



When completed select “Next Step”.

Created a New Group – Step 2

Step 2 of the wizard is where you set up the logic of whom in your database you would like in the group. If you would like a group of your maturities, this is where you would set that up.



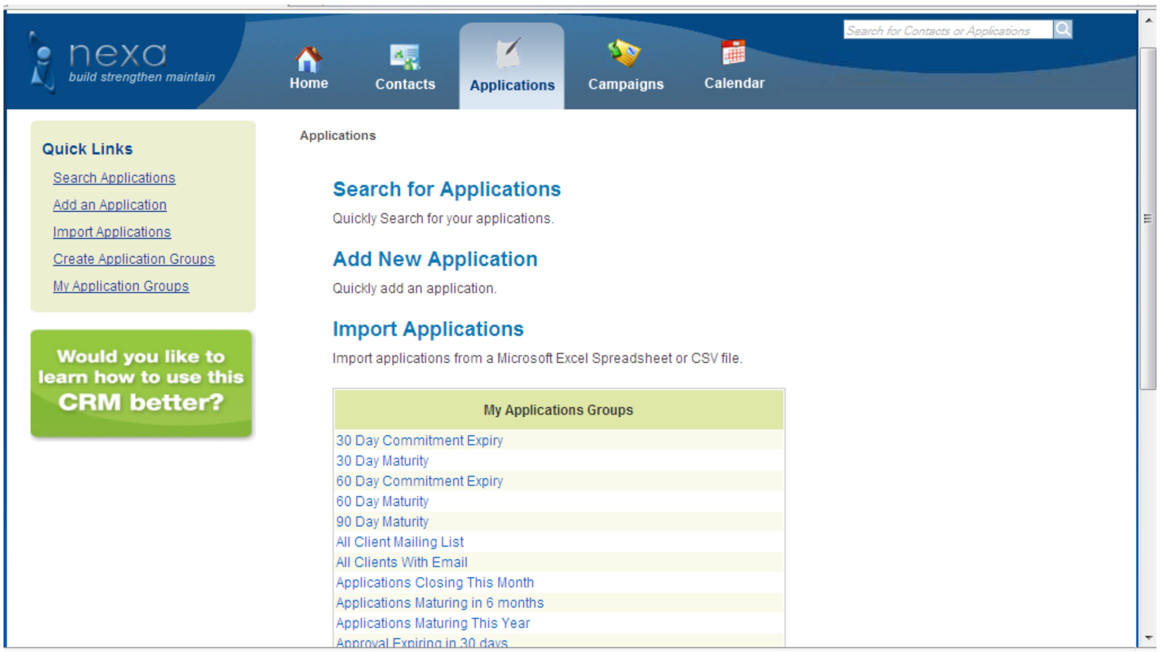
To create a filter you must fill in your criteria using 3 pieces of information. The first is the 'Field you are searching on'. From the drop down menu, select the field that you want to search. If the field you want to use is not in the drop down menu, select the "All fields" button above. Choose the logic of your group. Depending on your logic you may also need to fill in the field 'What are you looking for'.

In our example, we are going to search applications where the Application File Status is equal to Closed. In this example, the Field is "Application File Status", the logic is "Equal To" and what you are looking for is "Closed". Once you have created the logic you want to filter on select "Add This Criteria". This will move your filter to the bottom section under "Current Filters". At this point you can click on "Save Group Settings" to search based on this filter or you can create another filter.

To edit or remove a "Current Filter" use the drop down menu to the right. When you are complete, Click 'Save Group Settings'.

Viewing Groups

To view the contacts or applications of a group, click on the “Contacts” or “Applications” tab along the top.

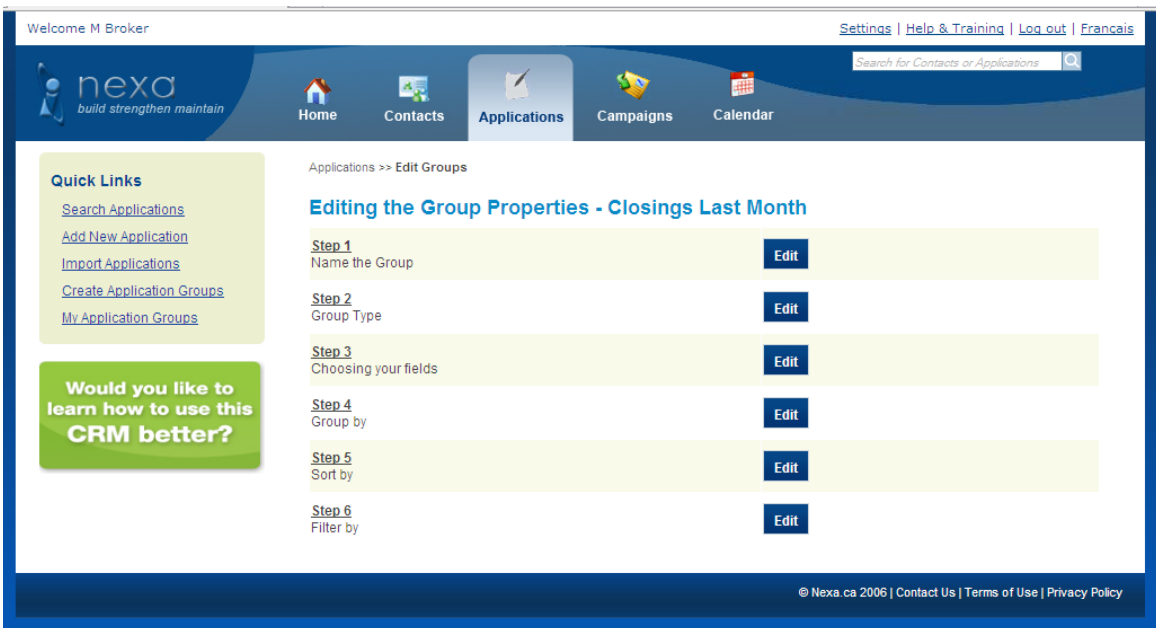


Under the My Contact Group or My Application Groups heading, click on the group you want to view. The group will open.

Editing Groups

To edit the contacts or applications of a group, click on the “Contacts” or “Applications” tab along the top.

Under the My Contact Group or My Application Groups heading, click on the group you want to edit. When the group opens click ‘Properties’ from the top navigation bar.

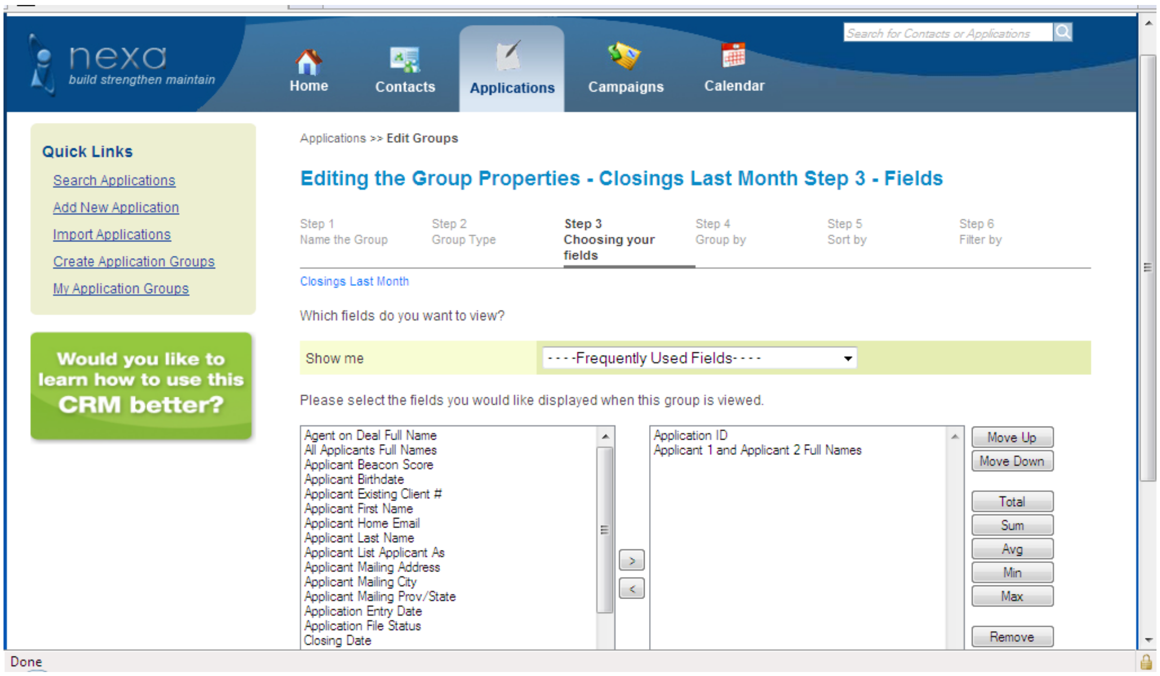


The edit group properties window will open and give you the option to edit from any of the steps used to create the group.
Click “Edit” beside the step you would like to make changes.

If you wish to review and edit all group properties, click “Edit” beside Step 1 and proceed through the steps making changes as needed.

Editing a Group – Step 3

Step 3 'Choosing your fields' presents you with all the fields available that you can view when your group is opened. You have the option from the Show Me drop down menu to see Frequently Used Fields, Commonly Used Fields or All Fields. After selecting from the drop down menu, the available fields will be in the box on the left.



Click on a field name in the list of "available Fields" on the left to select it. Then click the ">" arrow button in the middle to add that field to the list of "selected Fields" on the right. Continue this process until you have selected all the fields you want.

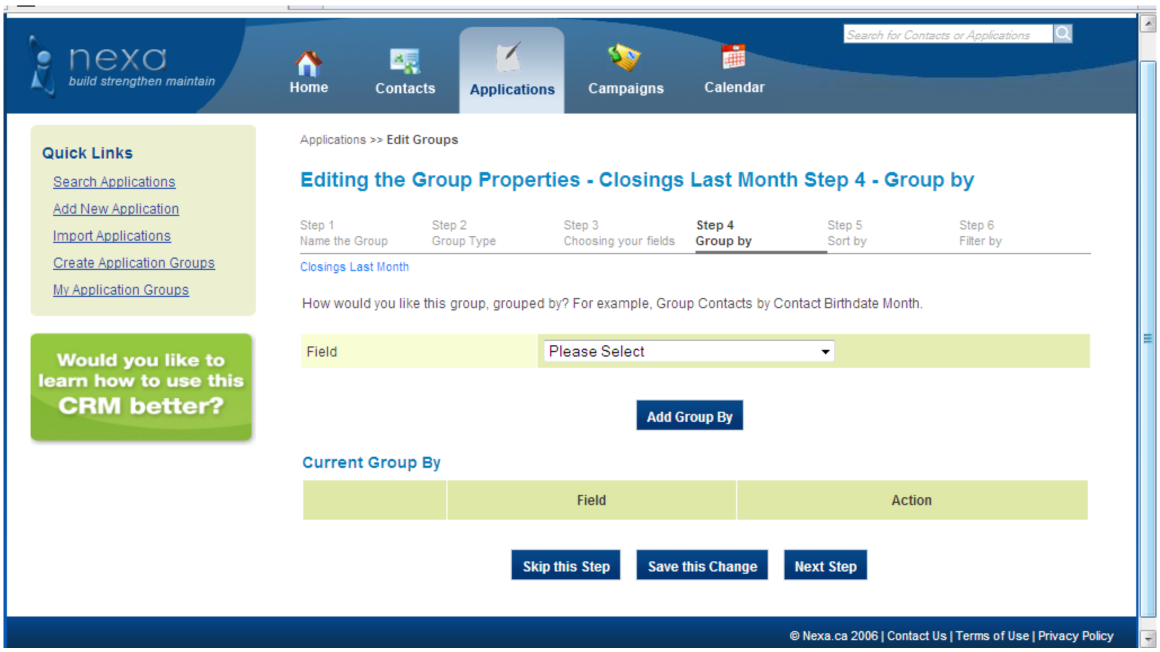
The buttons to the right of the "selected Fields" are used to change the order the fields will be displayed when you view the group. The first field will appear on the left, the last will appear on the right.
To remove a field from the "selected fields" on the right, click on the field you want to remove then click the "<" arrow button. The field will return to the list of "available fields".

Click "Next Step" when you have the fields you want.

Editing a Group – Step 4

Step 4 and Step 5 allow you to select in what order you will view your contacts or applications in the group.

'Group by' allows you to group the results of your group by any field you have selected in Step 3.



For example if you would like to group your prospects by the city they are living in you can choose from the "Field" drop down "Current City", then click on "Add Group By". This will move the field to appear under the "Current Group By" heading.

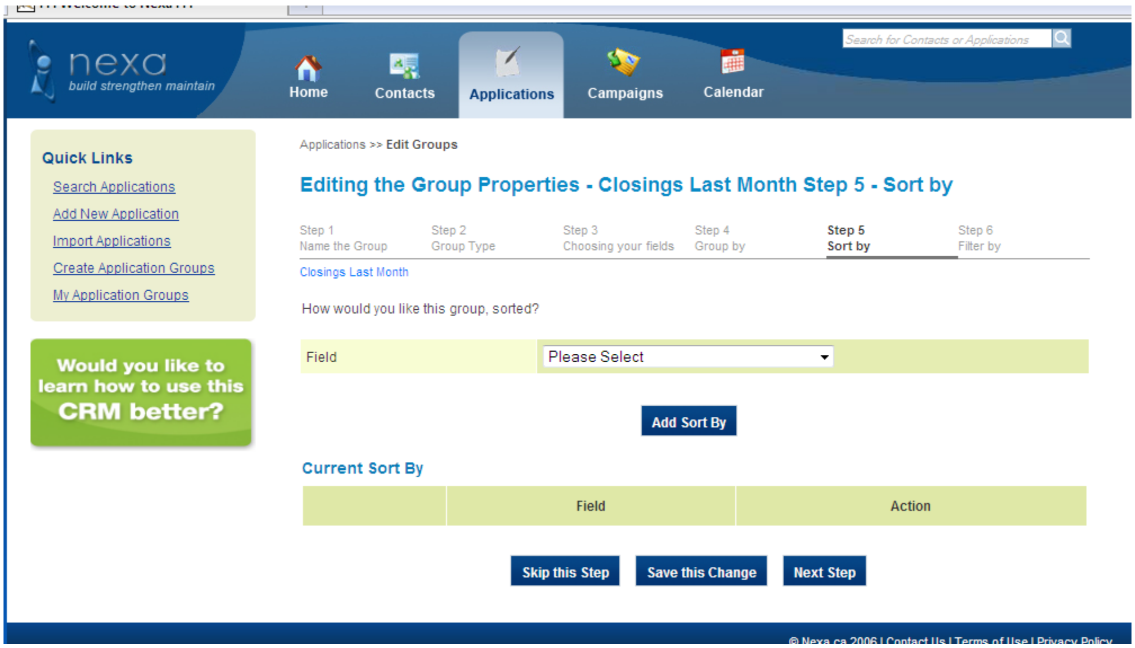
To edit or remove this "Current Group By" use the drop down menu to the right.

Click 'Next Step' when you are finished.

This step can be left blank by clicking directly on 'Next Step'.

Editing a Group – Step 5

'Sort by' allows you to sort the results of your group by any field you selected in Step 3.



Choose the field you would like to sort by from the "Field" drop down menu, then click on "Add Sort By" button. This will move the field to appear under the "Current Sort By" heading.

To edit or remove this "Current Sort By" use the drop down menu to the right.

Click 'Next Step' when you are finished.

This step can be left blank by clicking directly on 'Next Step'

Addresses – Current vs. Mailing

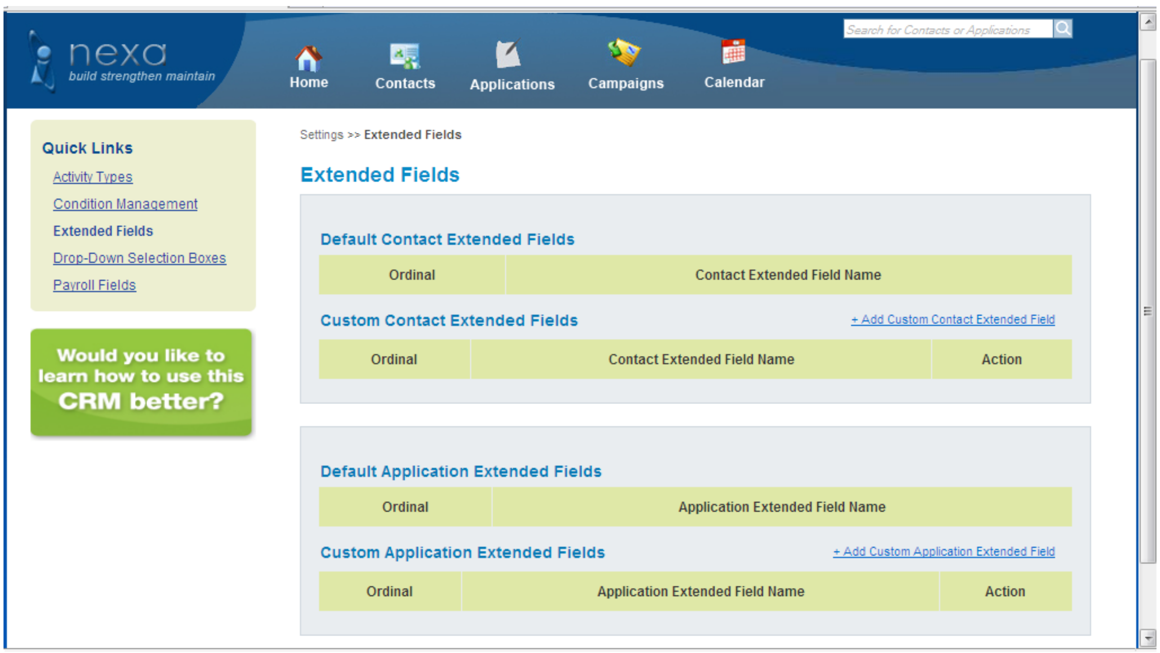
When creating groups in Nexa you have the choice of three addresses - the Current Address, the Property Address and the Mailing Address.

When choosing an address field to use we recommend using the Mailing Address. The Mailing address will be the Current address of the Applicant until after the closing date. Once the application is statused as Complete the Mailing address will change to whichever address you have chosen in Expert to use after the closing. It either will remain as the Current address or will change to the Property address.

Adding Extended fields

Extended Fields are customizable fields that you can add to your contacts and applications. This allows you to track information that is not included in the default program.

To add extended fields click on the ‘Settings’ link in the top right corner of the screen. Click on ‘Extended Fields’.

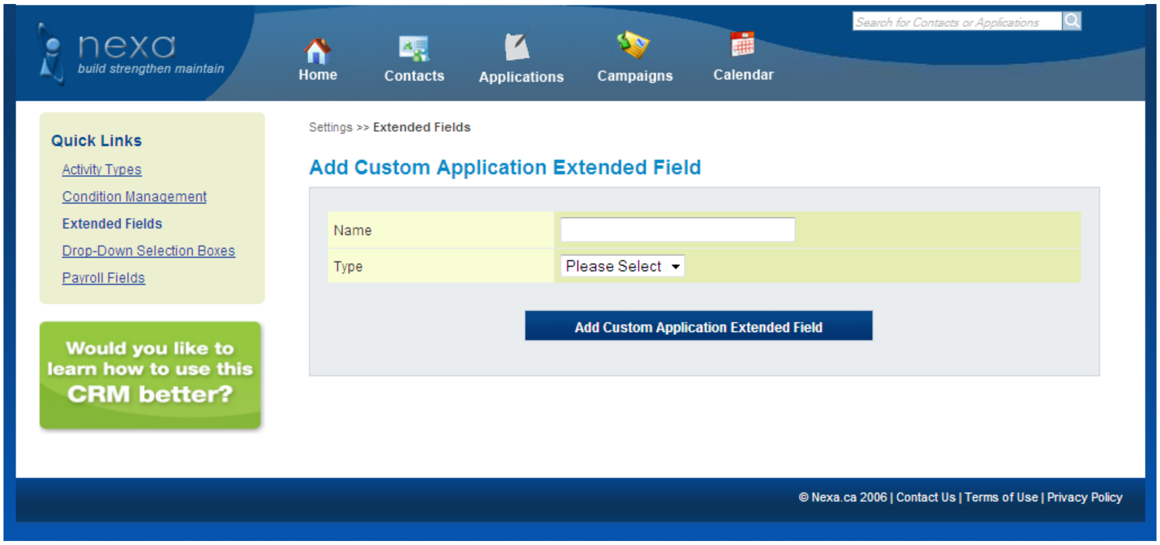


To add an extended field to your contacts choose “Add Custom Contact Extended Field”.

To add an extended field to your applications choose “Add Custom Application Extended Field”.

Adding Extended fields

You can customize the name, type and format of the fields you are creating.



In the first box type the name of the field you are creating. It is very important that the name be unique.

In the Type field, choose if the data you enter into this field will be “Text”, “Number”, “Percent”, “Yes/No” or a “Date”.

Depending on the type of field you choose the format options will change accordingly.

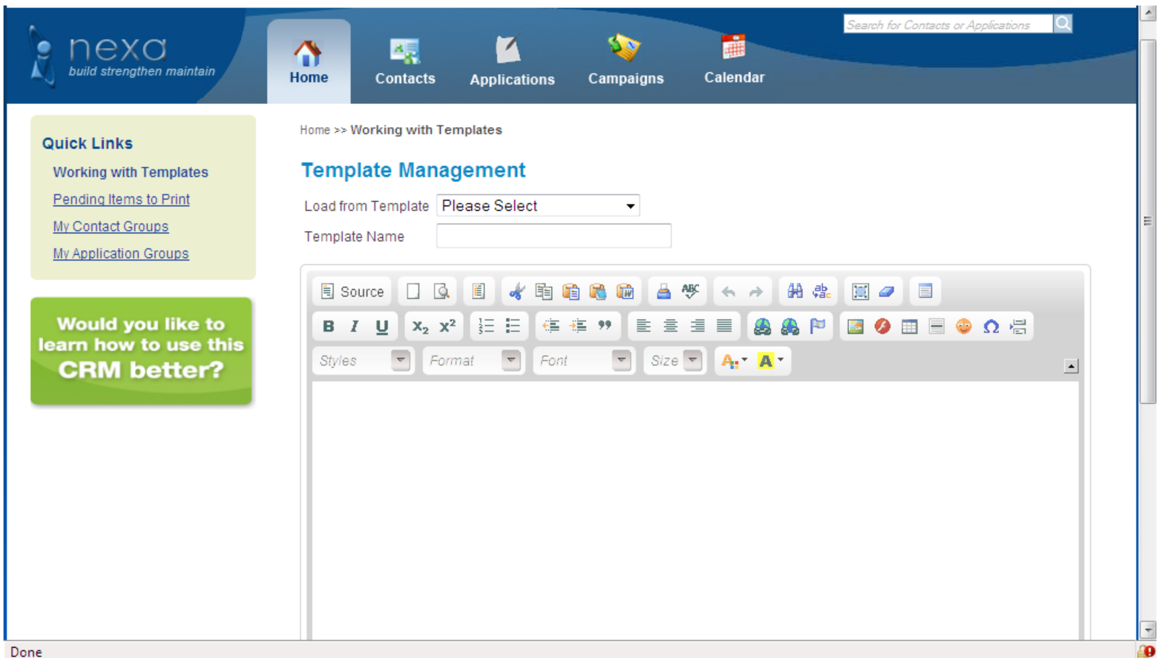
When completed choose “Add Custom Extended Field”.

When you now work with your contacts or applications you will have available under the “Extended Fields” section, the fields you have created.

Working with Templates

Before sending an email or printing a letter you must first create a template. The template is the email or the letter you want to send.

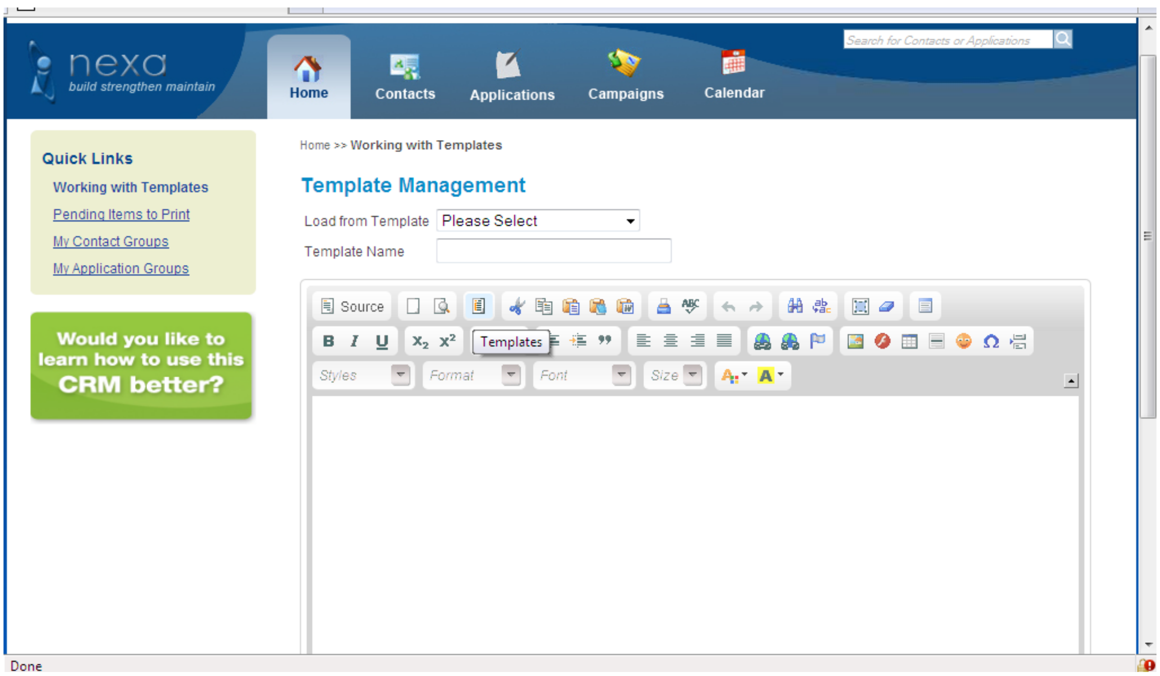
To access the template section of Nexa click on the "Working with Templates" link under the "Quick Links' heading on the homepage. This will open the Template Management screen.



Templates in Nexa

Nexa has templates already created that you can open and edit.

To access these templates, click on the “Templates” icon in the shaded area above the blank template.



Scroll through the templates available and click on the template you want to use.

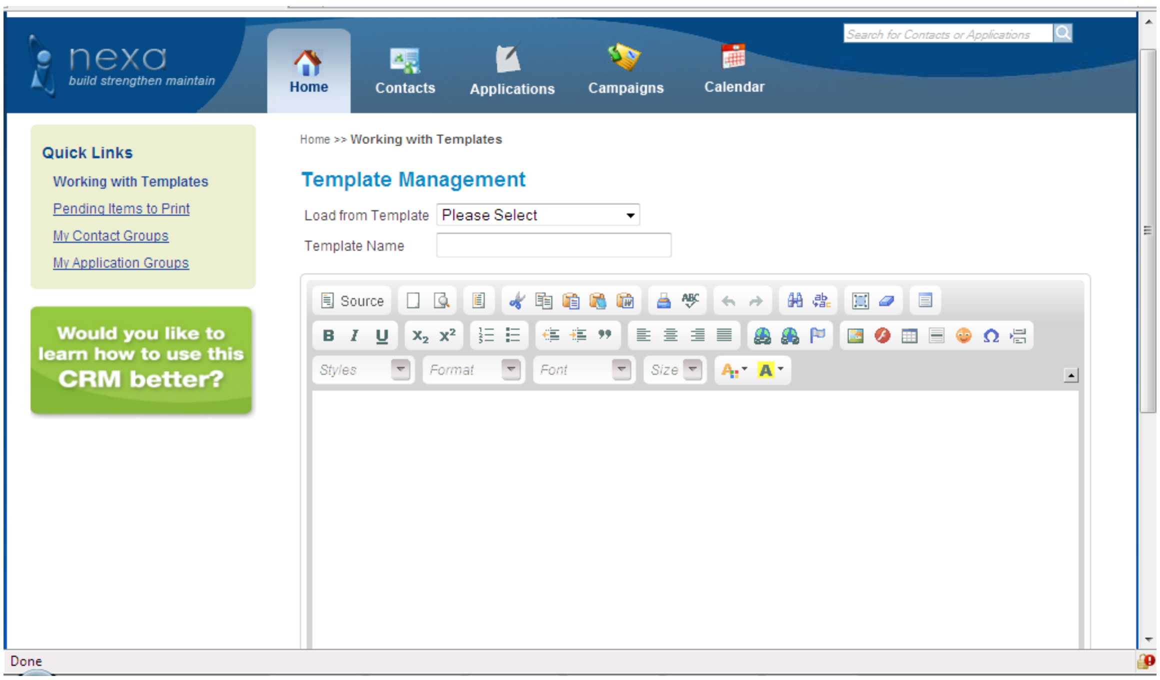
Once the template is open, you can edit the template by adding images and editing the text. After you have made your changes to the template, give the template a name in the “Template name” field and click on “Save New Template”.

This will save the template in Nexa so it can be used for all actions.

Creating a new Template

If you do not want to use one of the templates already created in Nexa, you have the option of creating your own template. To do this open the template section in Nexa by clicking on the "Working with Templates" link on the homepage. This will open the Template Management screen.

Create your email/letter in the blank template.

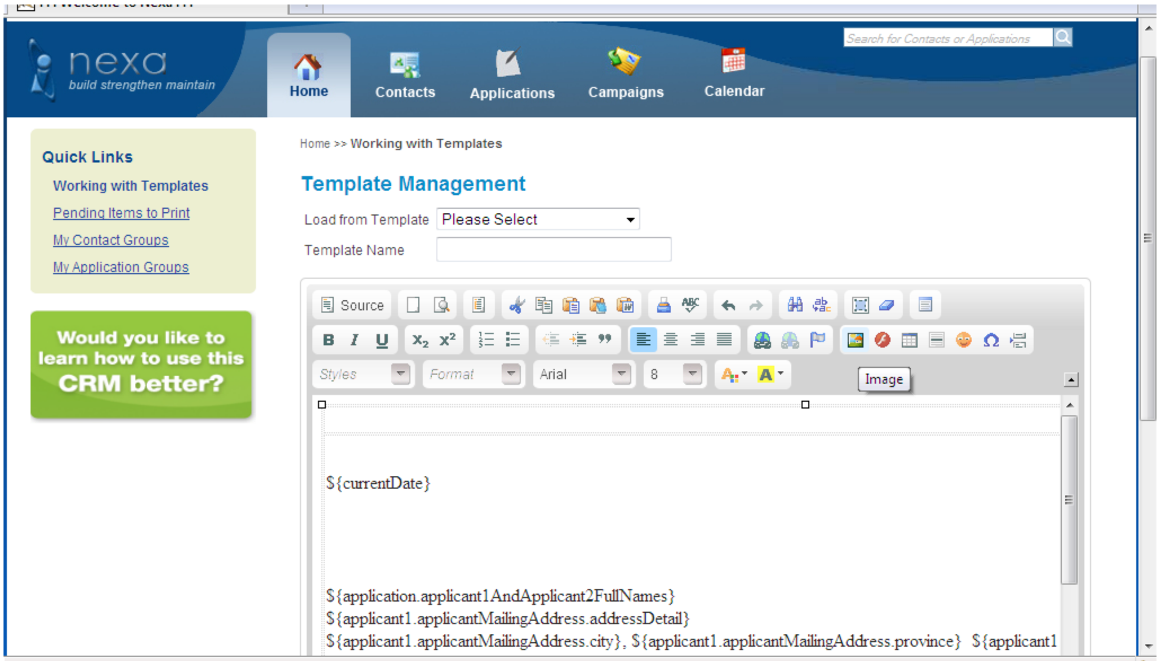


When your template is complete, enter a name for your template in the "Template Name" field and click 'Save New Template'.

This will save the template in Nexa so it can be used for all actions.

Adding an image to a Template

To insert an image into a template, click on the “Image” icon in the shaded area above the template.



Click ‘Browse Server’.

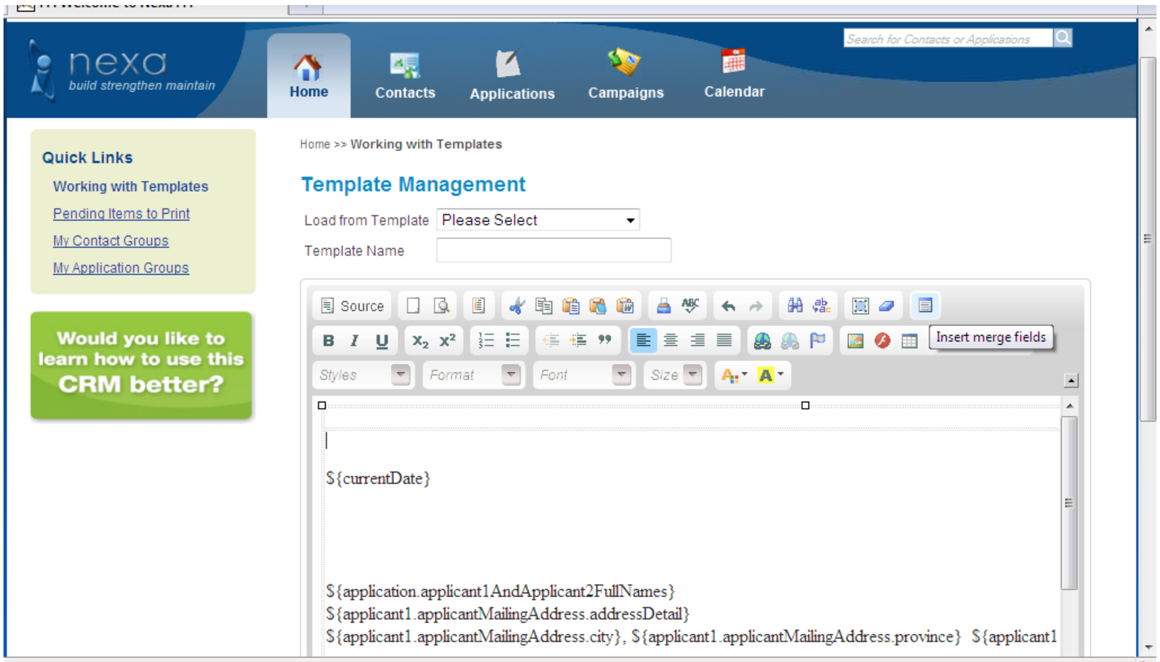
Any images you have already uploaded to Nexa will show on this screen. To upload a new image, click on ‘Browse’ at the top of the screen to find the image on your computer. Click on the image and click ‘Open’. Click ‘Upload’. This will upload the image to Nexa so it can be used again in future templates.

To insert the image after it has been uploaded, click on the image name you want to insert into the template. Click ‘Select’. This will bring you to the image properties screen where you can adjust the height and width of the image. Click ‘OK’ when you are ready to insert the image.

The image will insert into the template.

Adding Merge Fields to a Template

Merge fields can be inserted into a template to insert information from the contact or the application. Click on the 'Insert Merge Fields' icon in the shaded area above the template.



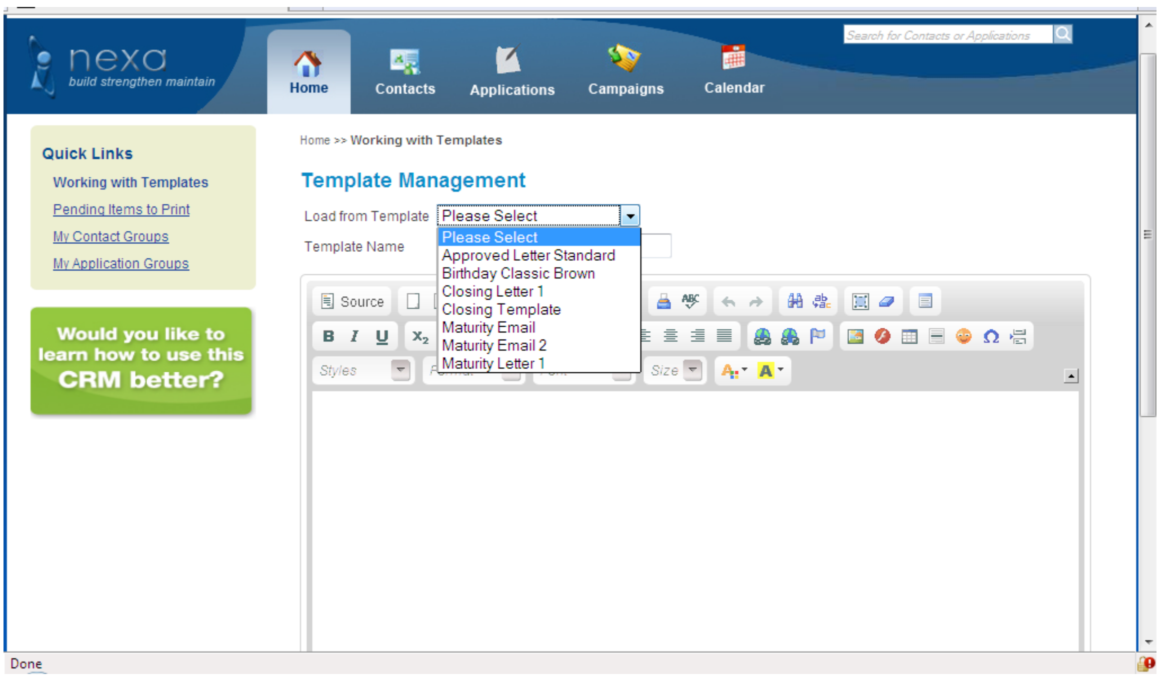
Scroll down the list of fields and click on the field you want to insert.

Please note: there are different merge fields for Contacts and Applications. If you are using the template to communicate with your contacts, you must use the 'Contact' merge fields. If you are using the template to communicate with your applications insert the 'Application' merge fields.

Editing a Template

To edit a template you have already saved, click on the “Working with Templates” link under the “Quick Links” heading on the homepage.

From the “Load from Template” drop down menu, select the template you want to edit.

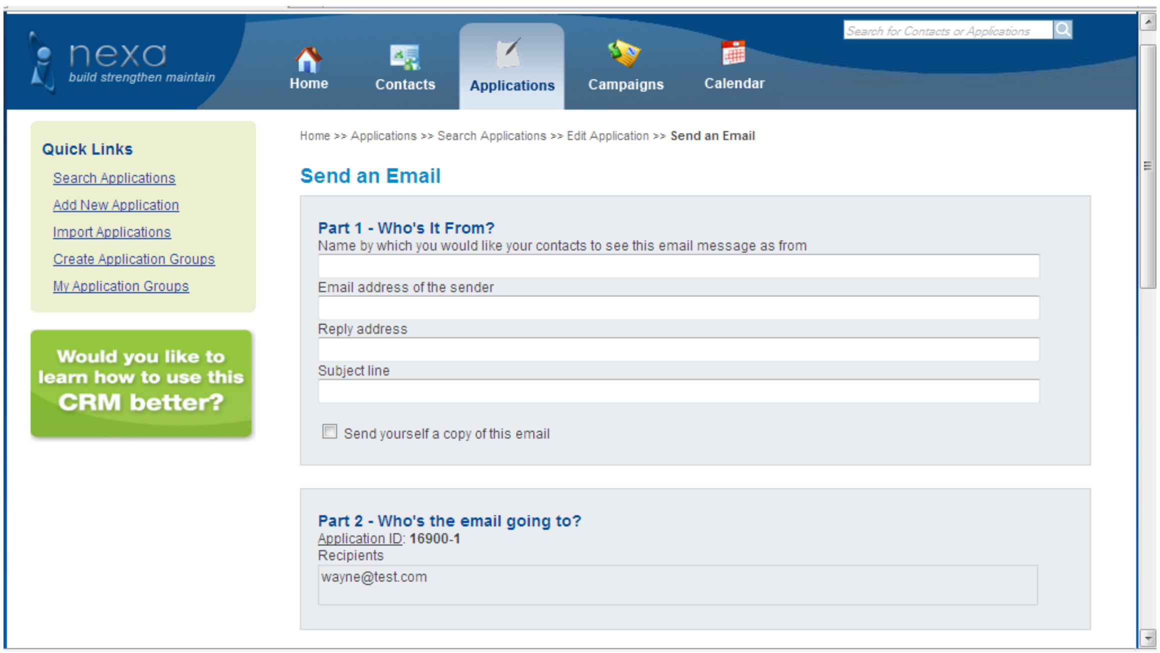


When your changes have been made click “Save”.

Sending an Email

To send an email to a contact or applicant you must first create the template. The template is the body of the email. Once the template is created you are ready to send the email.

Under Contacts or Applications search for the contact or application you are sending the email. Click 'Send Email'.



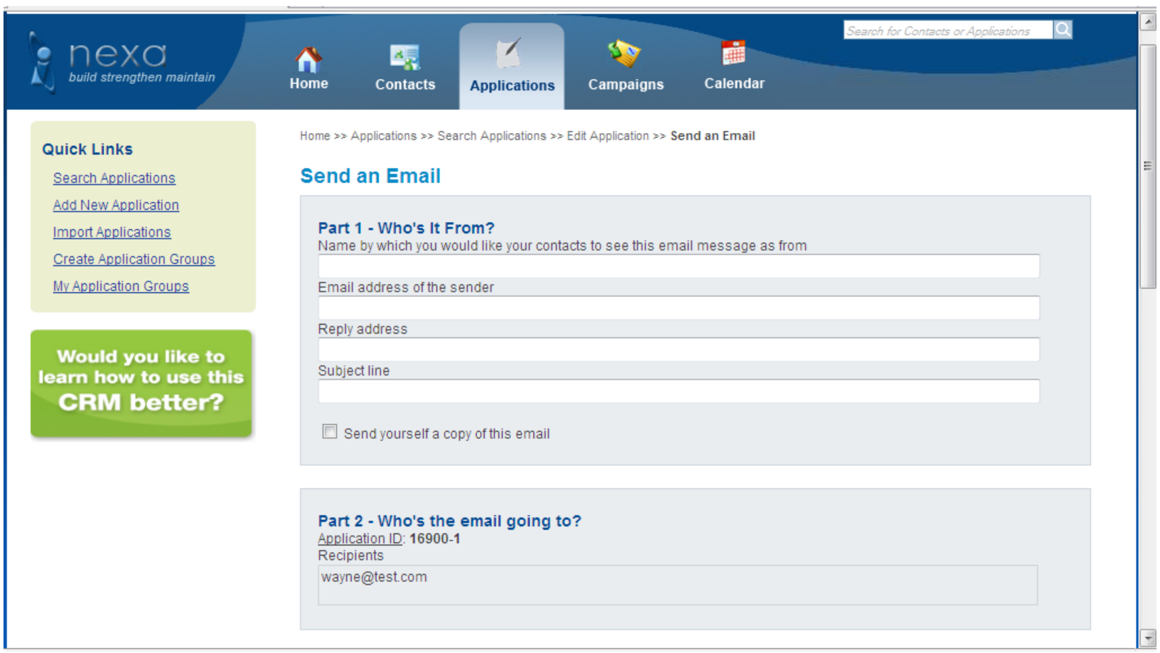
Part 1 - Fill in the required fields – Name by which you would like your contacts to see this email as from, Email address of the sender, Reply address and Subject line. If you check 'Send yourself a copy', the email will be sent to the email address that inContact has listed on your account.
Part 2 - The recipients field will be filled with the email address from the contact record or application.
Part 3 - From the "Load from Template" drop down menu select the template you want to send. Click "Send".

The Activity History on the client record will update with the date the email was sent and the subject line.
Note: We recommend sending the email to yourself to check the formatting/appearance before sending to your clients.

Sending an Email to a group

To send an email to a group of contacts or applications you must first create the template and the group containing the clients you want to email. Once the template and the group are created, you are ready to send the email.

Under My Contact Groups or My Application Groups click on the group you are sending the email to. When the group opens click 'Send Email'.



Part 1 - Fill in the required fields – Name by which you would like your contacts to see this email as from, Email address of the sender, Reply address and Subject line. If you check 'Send yourself a copy', the email will be sent to the email address that inContact has listed on your account.

Part 2 - The recipients field will be filled with the email address from the contacts or applications in the group.

Part 3 - From the "Load from Template" drop down menu select the template you want to send. Click "Send".

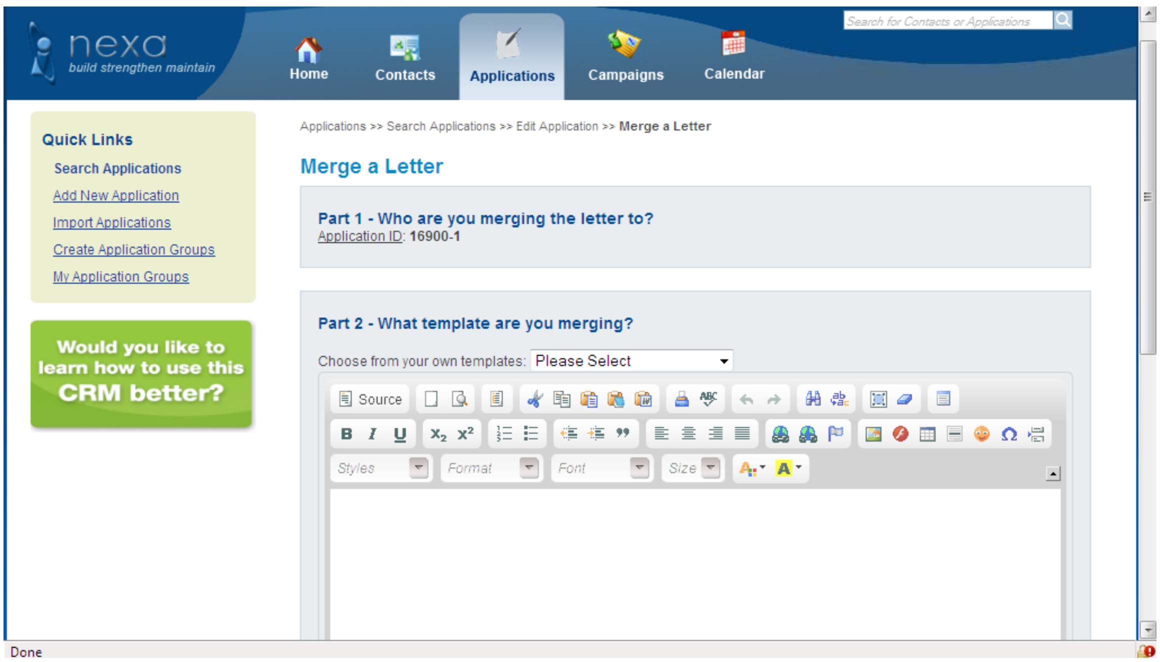
The Activity History on each of the client records will update with the date the email sent.

Note: We recommend sending the email to yourself to check the formatting/appearance before sending to your clients.

Merging a Letter

To print a letter to send to a client you must first create the template. The template is the body of the letter. Once the template is created, you are ready to print your letter.

Under Contacts or Applications search for the contact or application you are merging the letter for. Click 'Merge Letter'.



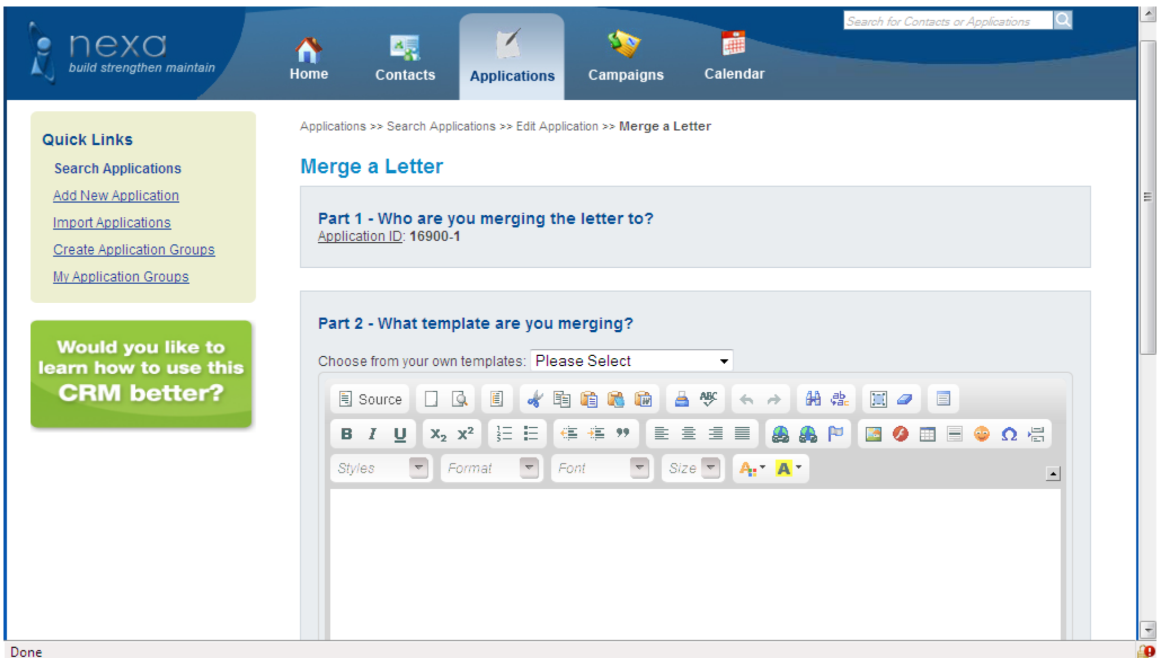
From the "Load from Template" drop down menu, choose the template you want to use to print out your letter. Click 'OK'.

The letter will open as a pdf file. Once you have opened the file the letter can be printed or saved to print later.

Merging a Letter for a Group

To merge a letter for a group of clients, you must first create the template and the group containing the clients for whom you are printing the letters. Once the template and the group are created, you are ready to merge your letters.

Under My Contact Groups or My Application Groups click on the group you are sending the letter to. When the group opens click 'Merge Letter'.

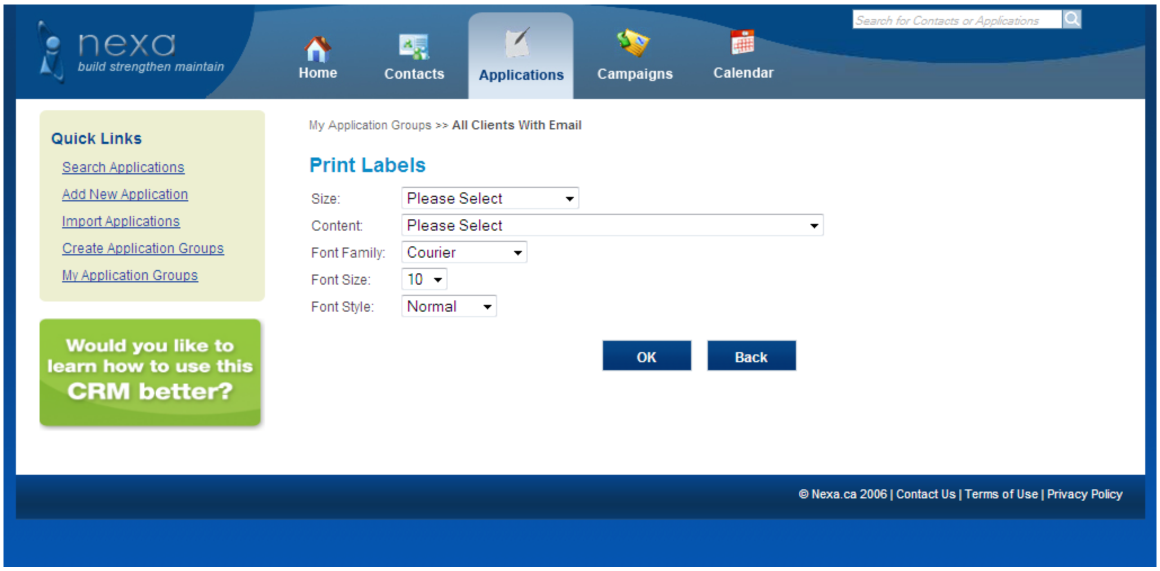


From the "Load from Template" drop down menu, choose the template you want to use to print out your letter. Click 'OK'.

The letters will open as a pdf file. Once you have opened the file you can print the letters or save the file to print later.

Printing Labels for a Group

Under My Contact Groups or My Application Groups click on the group you are printing labels for. When the group opens click 'Print Labels'.



Using the drop down menus select the size of labels you are using and the content you want included on the label.

Click "OK" when done.

The labels will open as a pdf file. Once you have opened the file you can print the labels or save the file to print later.

Campaigns

Campaigns in Nexa are individual tasks that can be set up to have an action automatically occur. When creating a campaign, three types of actions are available. They are; an email to your contacts, a printed piece or a notification to yourself or a recipient of your choosing.

For example, if you would like all pre-approvals that are expiring in 30 days to receive an email reminder this would be considered an “action”.

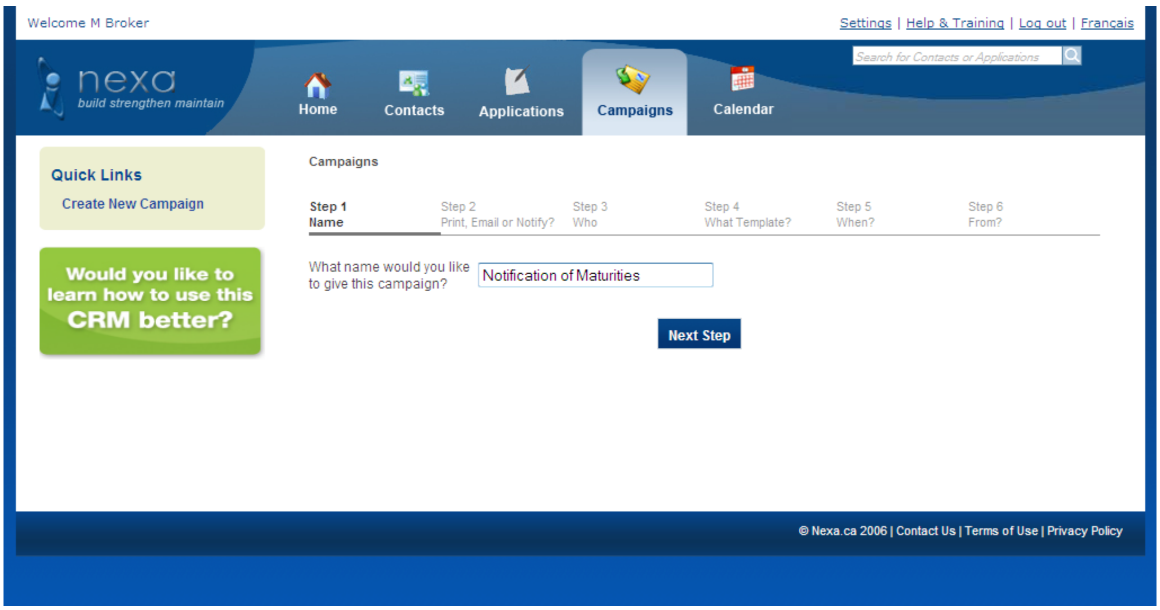
Before setting up a campaign, create a group containing the clients to whom the action will apply. For example, if you would like to create a campaign to email all applicants who have a pre-approval expiring in 30 days, you must first create a group of applications where the pre-approval is expiring.

Creating a Campaign – Email Notification or Reminder

This will allow you to set up an automated email to be sent to yourself, your staff or a recipient of your choosing as a reminder or notification.

To create this action you will follow a 6-step wizard. To access the Wizard, select "Campaigns" for the top menu. Click on "Create New Campaign" on the left of your screen.

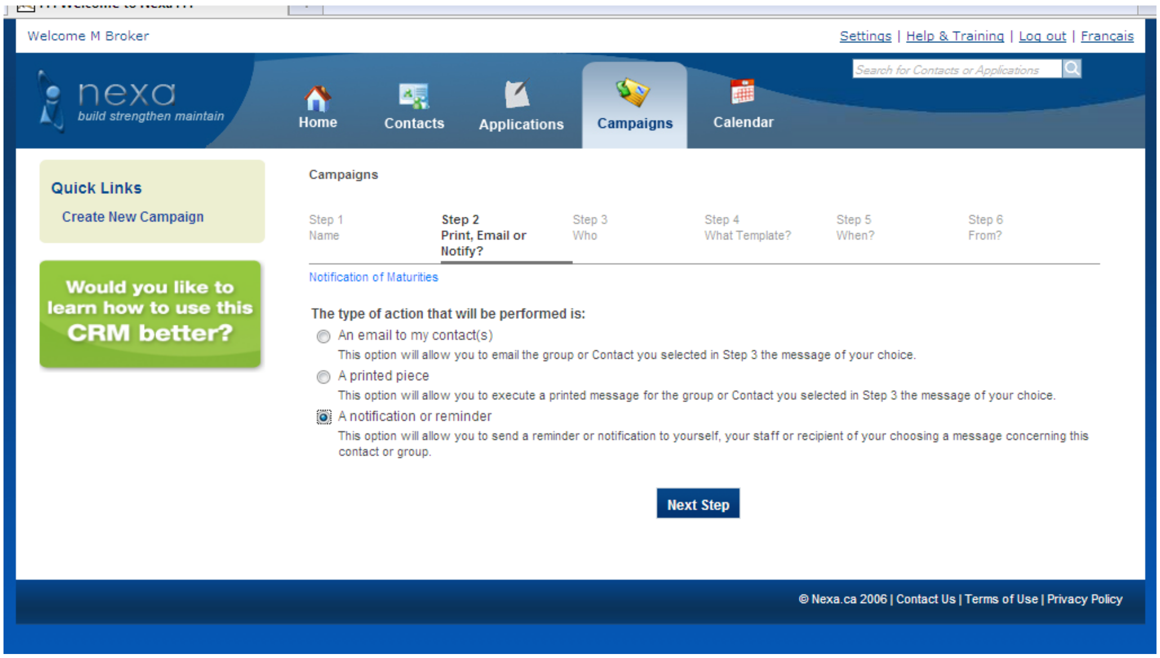
Step 1 will ask you to name the action. Use something that is descriptive.



Click "Next Step".

Creating a Campaign – Email Notification or Reminder – Step 2

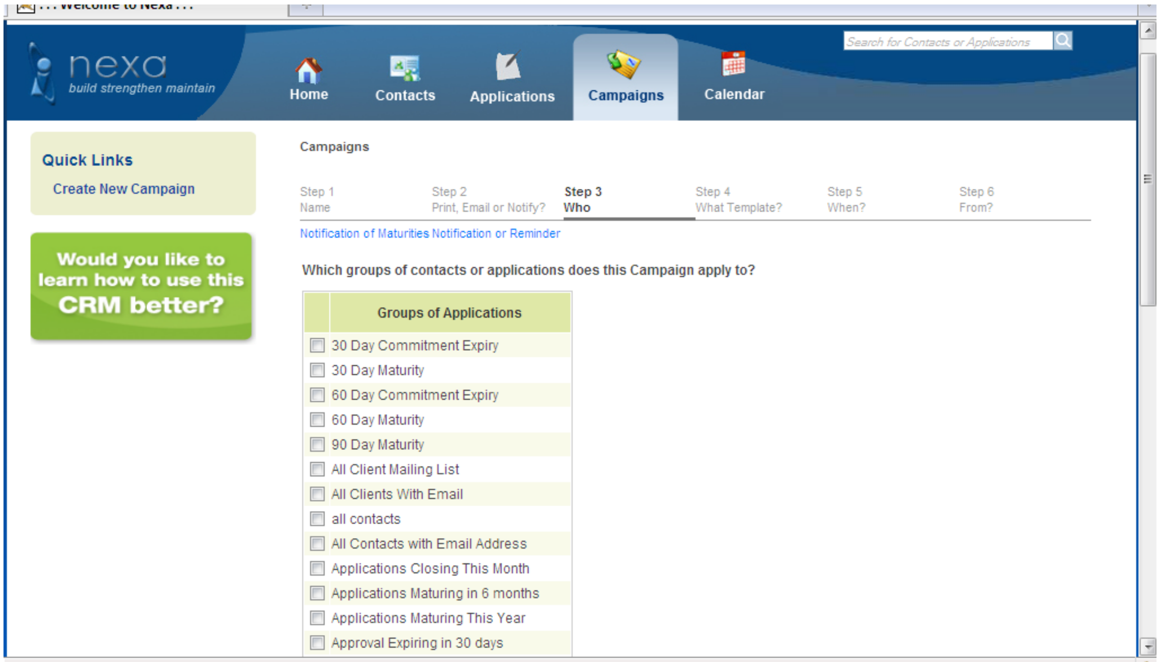
Step 2 allows you to specify the type of action you are setting up. Select “A Notification or reminder”.



Click “Next Step.

Creating a Campaign – Email Notification or Reminder – Step 3

In Step 3, select the group that the notification will be concerning.

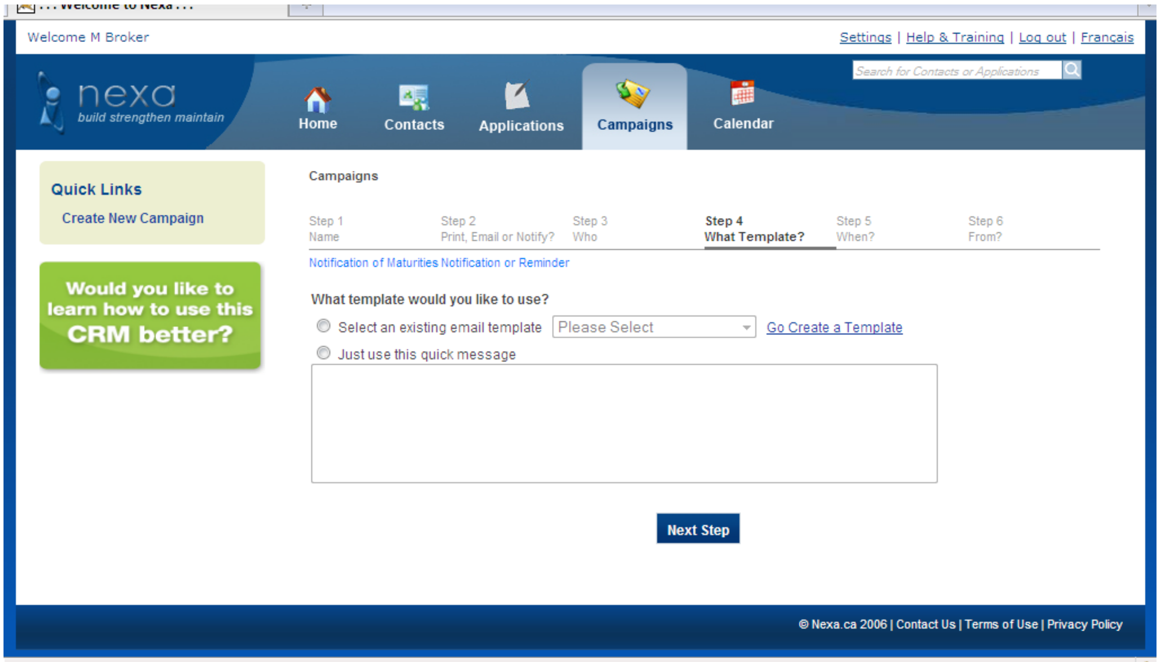


Below the list of groups, sender information for the notification email must be entered. The following fields will need to be filled in; Your Name, Your Email Address, Reply Address and the Subject Line.

Click “Next Step”.

Creating a Campaign – Email Notification or Reminder – Step 4

Fill in the content of the email notification.



The content of the email can be a template you have already created or it can be an email written just for this campaign.

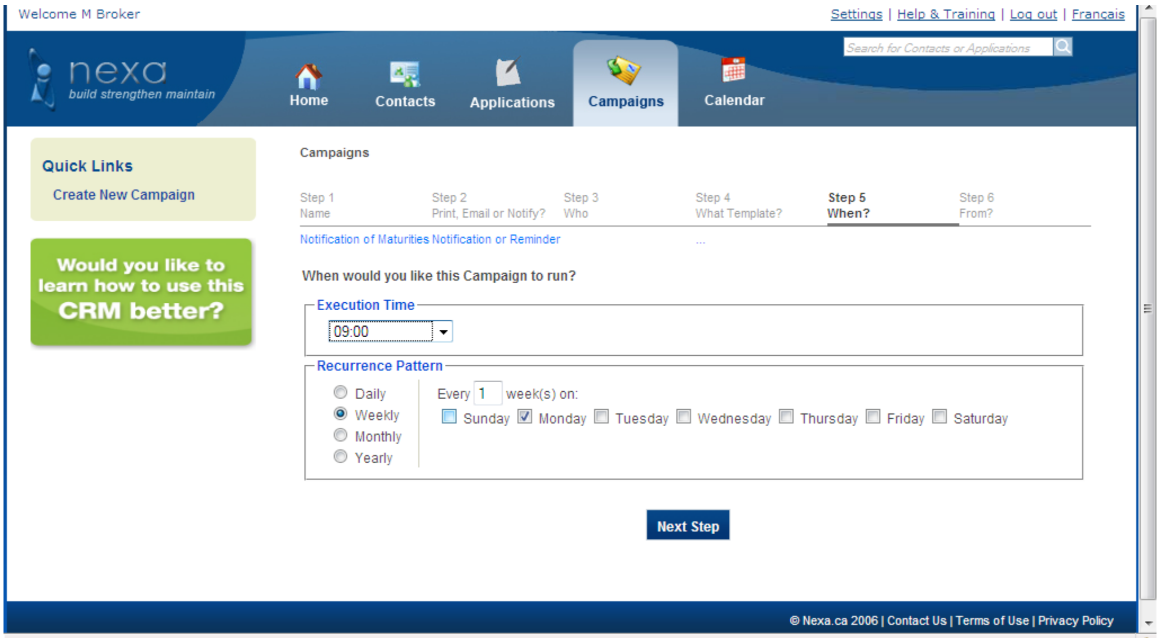
To have a template sent as the notification, select ‘Select an existing email template’ and then choose the template name from the drop down menu.

To write a notification for this campaign, select the option ‘Just use this quick message’ and type the contents of your email in the box below.

Click “Next Step”.

Creating a Campaign – Email Notification or Reminder – Step 5

Step 5 allows you to select when the notification will be sent.



Using the 'Execution Time' drop down menu choose the time of day the notification will be sent. **Note:** hours are in EST.

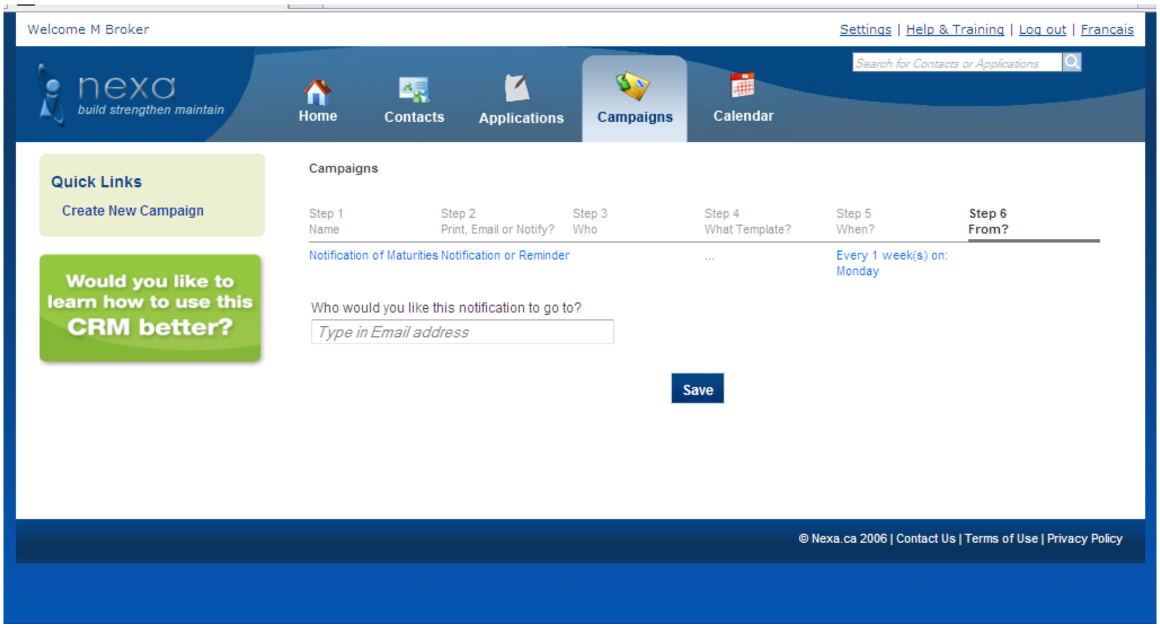
Under the 'Recurrence Pattern' heading choose the frequency and day(s) the notification will be sent.

In the example above, the email notification will be sent every Monday at 9:00am.

Click "Next Step" when you have scheduled your notification.

Creating a Campaign – Email Notification or Reminder – Step 6

In Step 6 fill in to whom the notification will be sent.



Type in the email address of the recipient. To enter more than one recipient, use a semicolon (;) between each email.

Click Save.

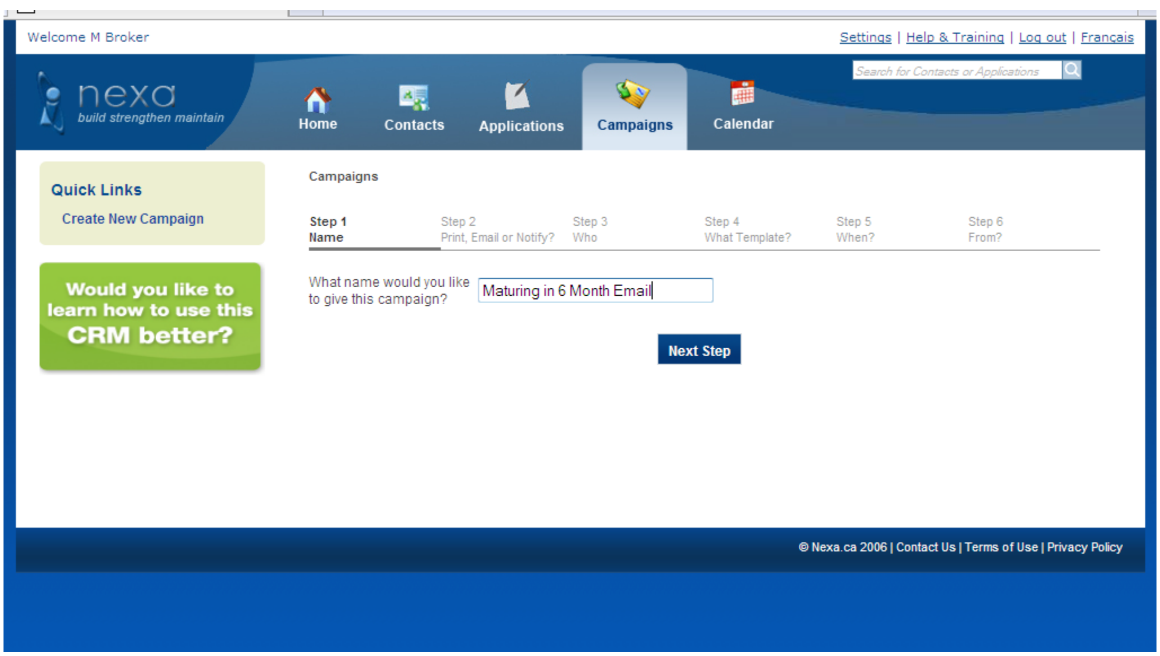
Please note: until the action is activated, no notifications will be emailed.

Creating a Campaign – Automated Email to Clients

This allows you the option to email a group of clients the message of your choice. Before setting up this action, create a group containing the clients you wish to email as well as the template you will be using. For example, if you would like to create an action to email all applicants who have a mortgage maturing in 6 months, you must first create a group in applications showing maturity dates expiring in 6 months and the template that will be sent.

To create this action you will follow a 6-step wizard. To access the Wizard, select "Campaigns" from the top menu. Click on "Create New Campaign" on the left of your screen and then "Start".

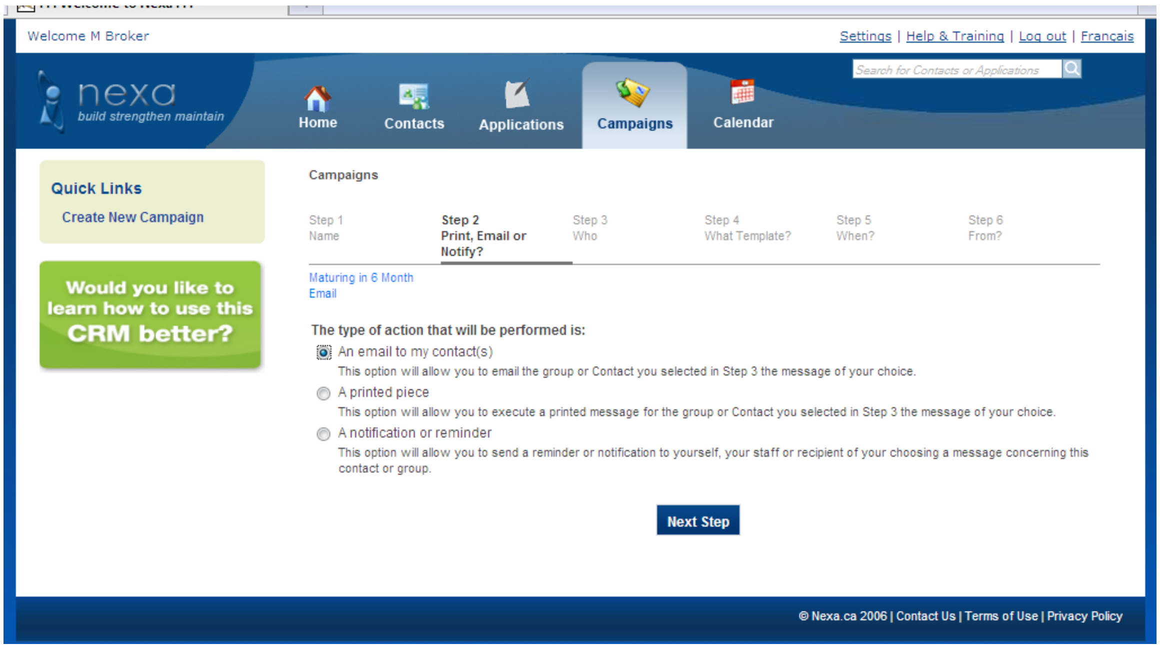
Step 1 will ask you to name the action. Use something that is descriptive.



Click "Next Step".

Creating a Campaign – Automated Email to Clients – Step 2

Step 2 allows you to specify the type of action you are setting up.

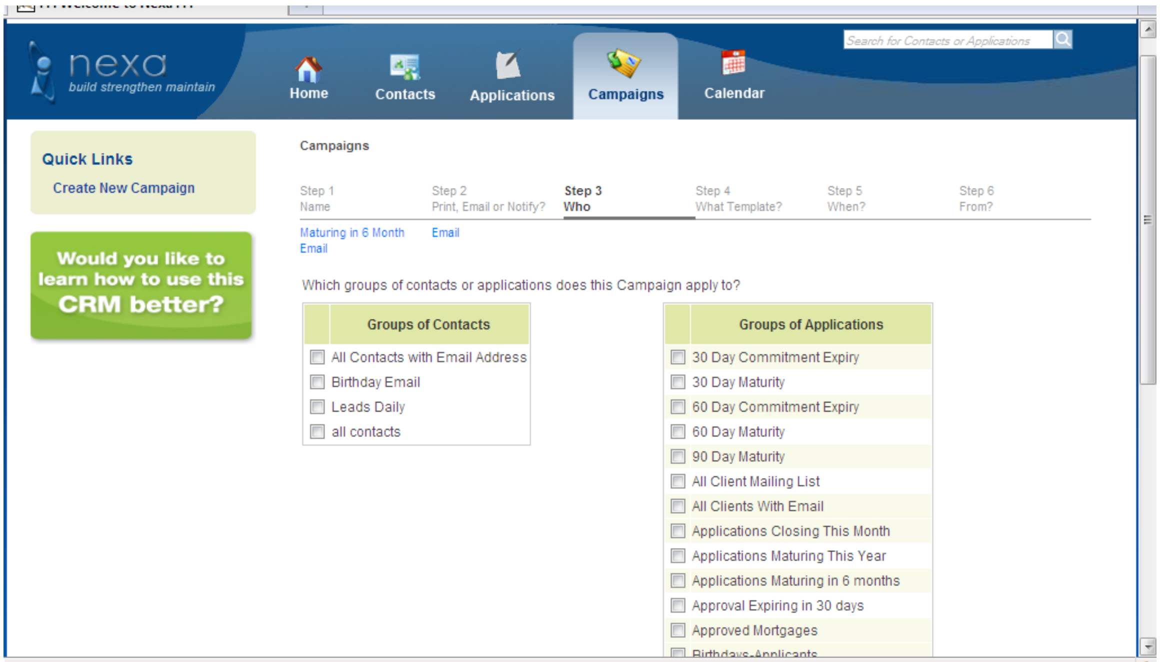


Select “An email to my contact(s)”.

Click ‘Next Step”.

Creating a Campaign – Automated Email to Clients – Step 3

In Step 3, choose the clients who will receive the email.

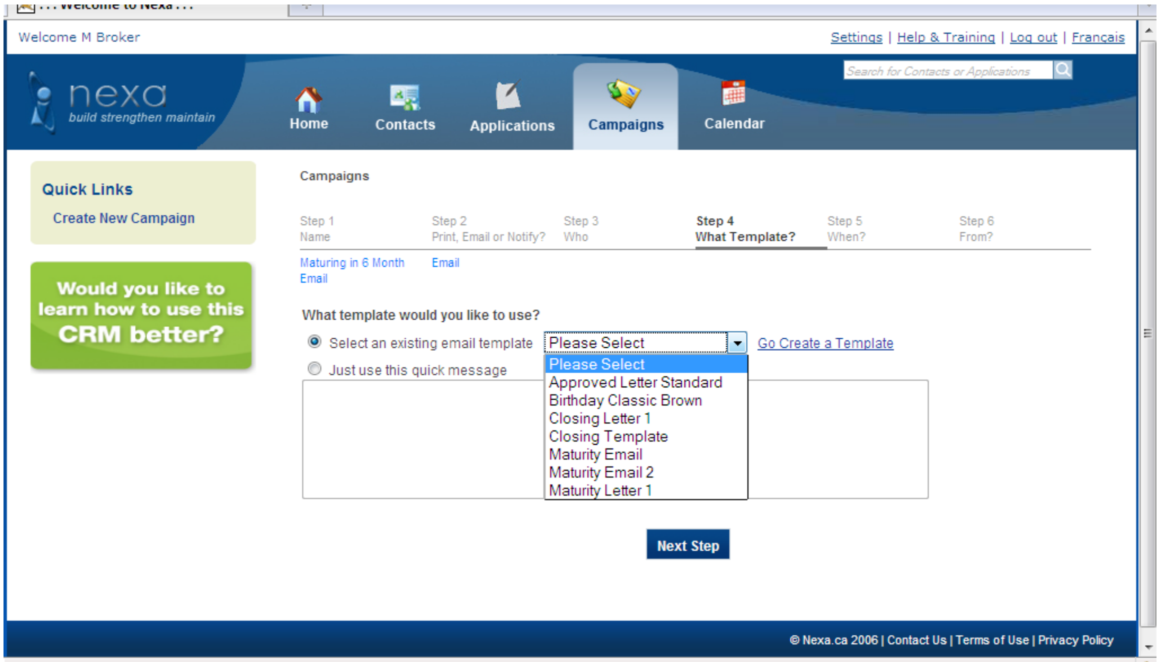


Select the group you want Nexa to use when the email is sent. Any clients in the group who have an email address at the time the email is sent will receive the email.

Click “Next Step”.

Creating a Campaign – Automated Email to Clients – Step 4

Select the content of the email notification.



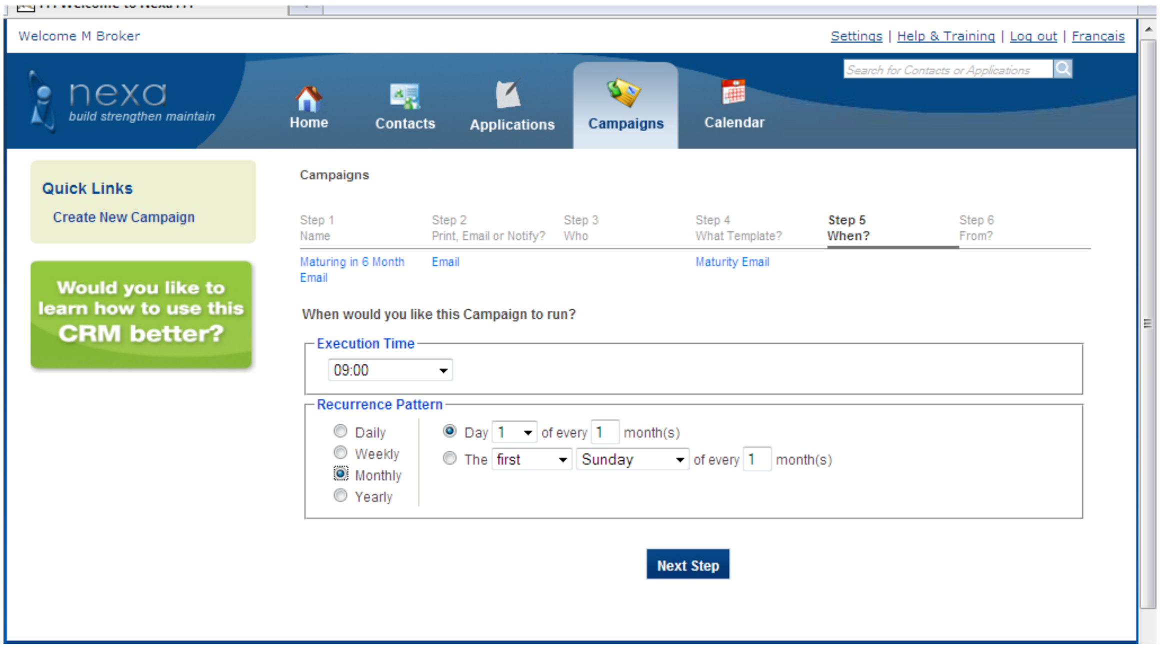
To have a template sent as the notification, select 'Select an existing email template' and then choose the template name from the drop down menu.

If you have not created the template, click "Go create a Template". When you have created and saved your new template, you will return to finish setting up your Campaign.

When you have selected the template you want to use, click "Next Step".

Creating a Campaign – Automated Email to Clients – Step 5

Step 5 allows you to select when the email will be sent.



Using the ‘Execution Time’ drop down menu choose the time of day the email will be sent. **Note:** hours are in EST.

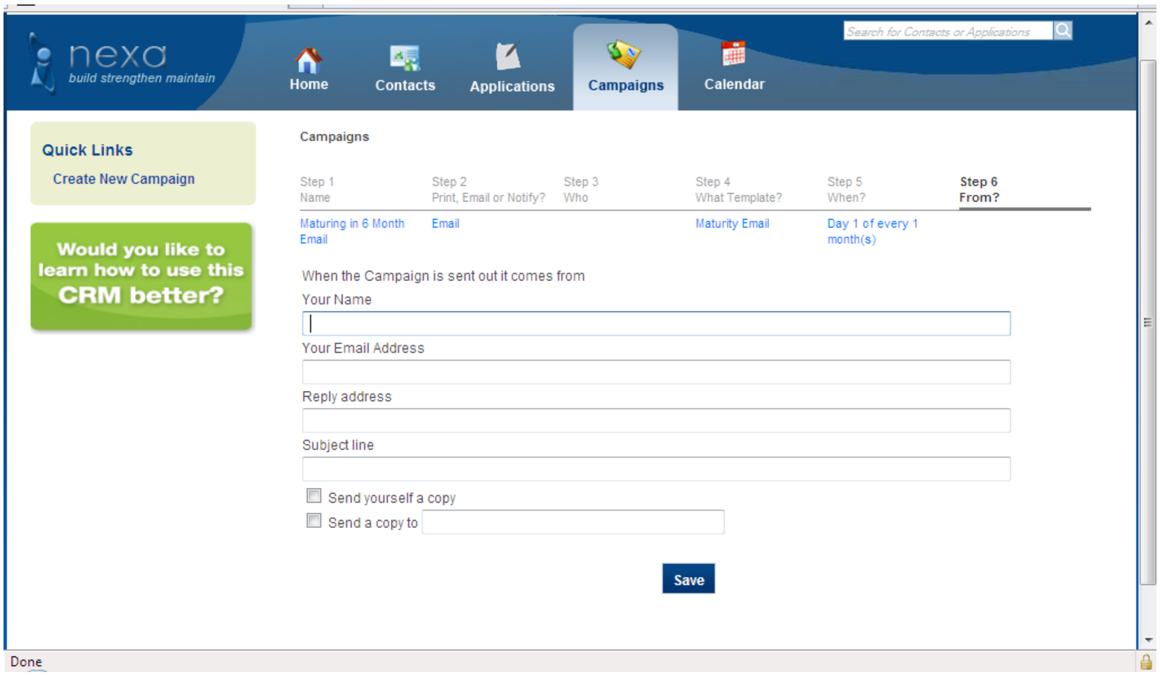
Under the ‘Recurrence Pattern’ heading choose the frequency and day(s) the email will be sent.

In the example above, the email will be sent at 9:00am the first of every month.

Click “Next Step” when you have scheduled your email.

Creating a Campaign – Automated Email to Clients – Step 6

Fill in the email details.



The following fields are required; Your Name, Your Email Address, Reply address and Subject line.

If you check 'Send yourself a copy', the email will be sent to the email address that inContact has listed on your account.
To send a copy of the email to a recipient not in the group you chose in Step 3, check the option "Send a copy to" and enter the email address you want included in the email.
Please note: when using the option to send yourself a copy or entering another recipient, any merge fields you have on the template you are using will not be filled in. Nexa will not have an application or a contact record from which to pull any merge field information.
Click "Save".

Please note: until the action is activated, no emails will be sent

Importing Contacts or Applications – preparing your spreadsheet

To import data into Nexa, the data must be in an excel spreadsheet or a CSV file.

Before using the 4-step wizard in Nexa to import your spreadsheet, the data on your spreadsheet should be clean and formatted correctly.

Check the following on your spreadsheet:

- ✓ Blank columns and rows have been removed
- ✓ Dates are in the MM/DD/YYYY format.
- ✓ Column headings are on each column and label the data in the column
- ✓ First and Last Names are separated. This data is imported into separate fields in Nexa so will need to be in individual columns.
- ✓ Columns that contain dates do not contain any other text
- ✓ Columns that contain numbers or percentages (i.e. Mortgage Amount or Interest Rate) do not contain any other text.

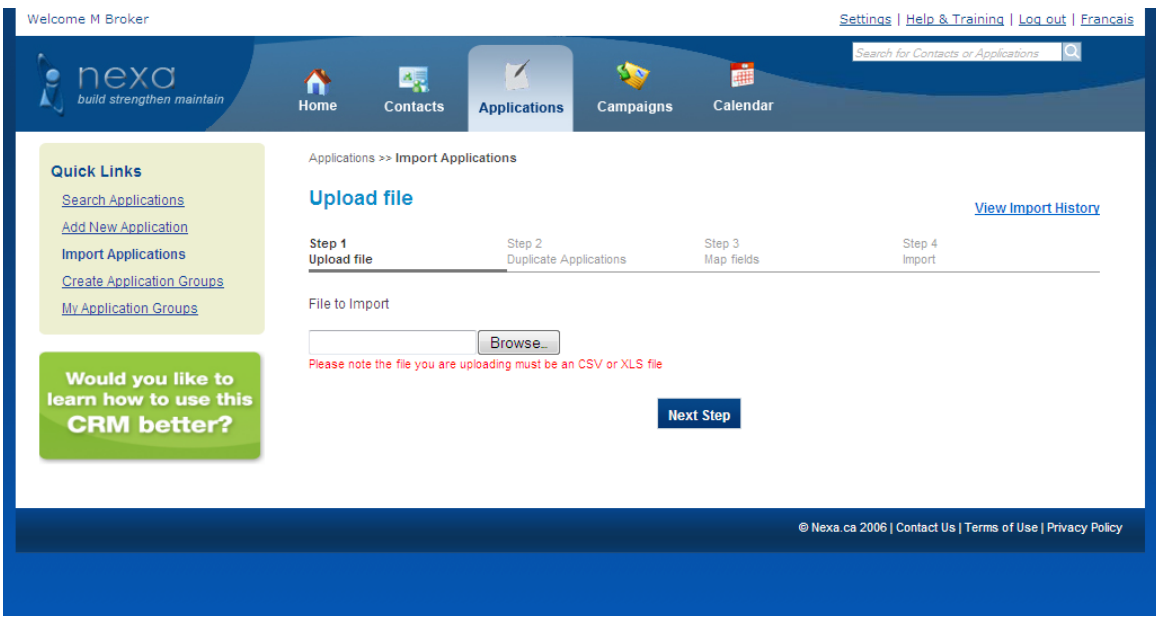
Check that the data on your spreadsheet has a field in Nexa. If you have data on your spreadsheet that is not already a field in Nexa, an extended field will need to be created before you start the import wizard.

Importing a spreadsheet

The 4-step import wizard is the same in Contacts and Applications.

If you are importing contacts, click on the Contacts tab and then 'Import Contacts'. If you are importing applications, click on the Applications tab, then 'Import Applications'.

Step 1 of the Import Wizard is selecting the spreadsheet that you want to import. Click Browse and locate the spreadsheet.



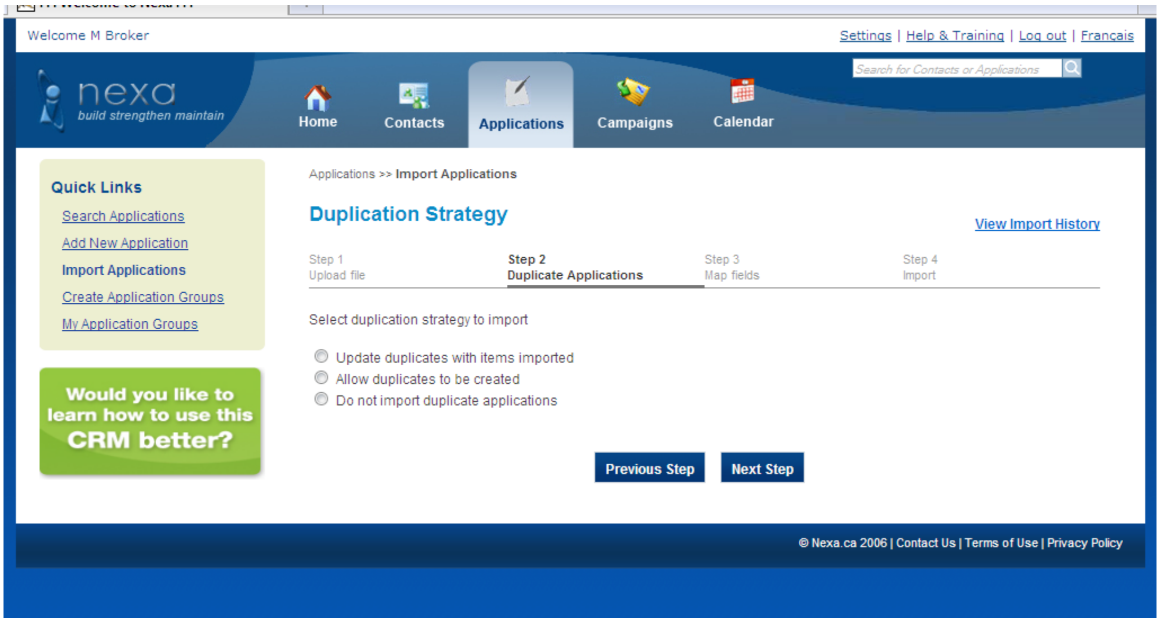
Click on the spreadsheet you are importing. Click Open.
The file must be either a CSV or an XLS file.

Click Next Step.

Importing a spreadsheet – Step 2

Step 2 is selecting the duplication strategy.

If Nexa finds the contact or application you are importing is already in Nexa, do you want Nexa to create a duplicate record, replace the record with the information you are importing or not import the duplicate record.



In Applications, Nexa will use the Application ID to identify a duplicate. In Contacts, you decide which fields Nexa should use to identify a duplicate by checking the field names.

For example, if you check First Name, Last Name and Home Email. If Nexa finds a contact on your spreadsheet that has the same first name, last name and home email address as a contact already in Nexa, it will treat the contact on your spreadsheet as a duplicate and use the duplication strategy you have selected.

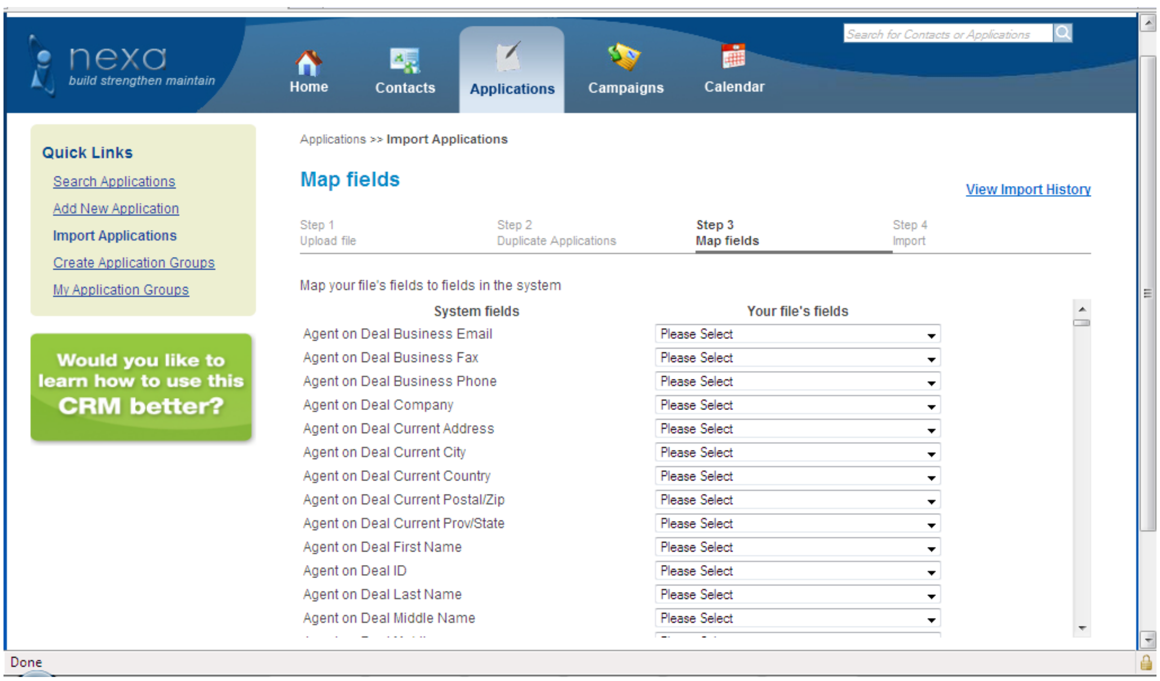
Click Next Step when you have selected your duplication strategy.

Importing a spreadsheet – Step 3

Step 3 is mapping the fields for Import.

The fields available in Nexa will show listed down the left. Beside each field is drop down menu that will contain the column headings from your spreadsheet.

Beside each Nexa field, select from the drop down menu, the column from your spreadsheet that will be imported into that field.



When all fields from your spreadsheet have been selected and assigned to a field in Nexa, click Next Step.

This will start your import. The progress of your import will show.

More information

inContact can tailor either an online or onsite training session for you.
Please call 1-866-290-6067 Ext 111 for more information.

Nexa Support - support@incontact.ca