

Getting started with Nexa Welcome Manual

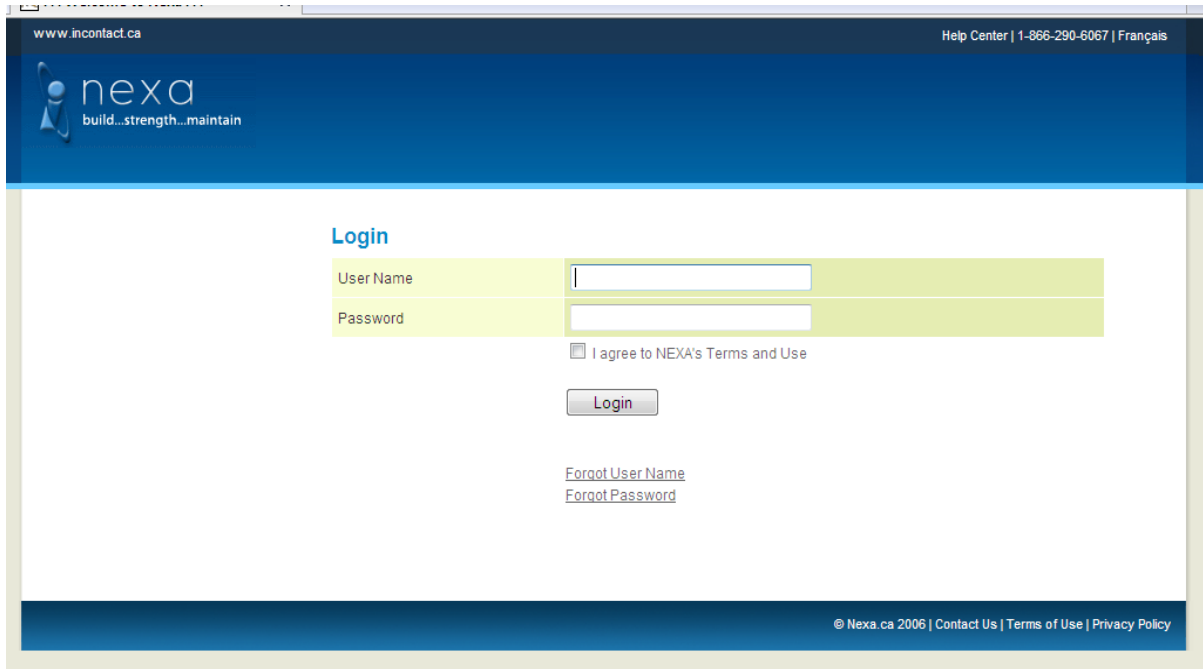


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Logging in

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”.



The screenshot shows the login page for Nexa. At the top, there is a dark blue header with the Nexa logo and tagline "build...strength...maintain" on the left, and the website URL "www.incontact.ca" and "Help Center | 1-866-290-6067 | Français" on the right. Below the header, the page has a light beige background. The "Login" section is centered and features two input fields for "User Name" and "Password" with light green labels. Below these fields is a checkbox labeled "I agree to NEXA's Terms and Use". A "Login" button is positioned below the checkbox. At the bottom of the login section, there are two links: "Forgot User Name" and "Forgot Password". The footer of the page is a dark blue bar containing the copyright notice "© Nexa.ca 2006 | Contact Us | Terms of Use | Privacy Policy".

www.incontact.ca Help Center | 1-866-290-6067 | Français

nexa
build...strength...maintain

Login

User Name

Password

☐ I agree to NEXA's Terms and Use

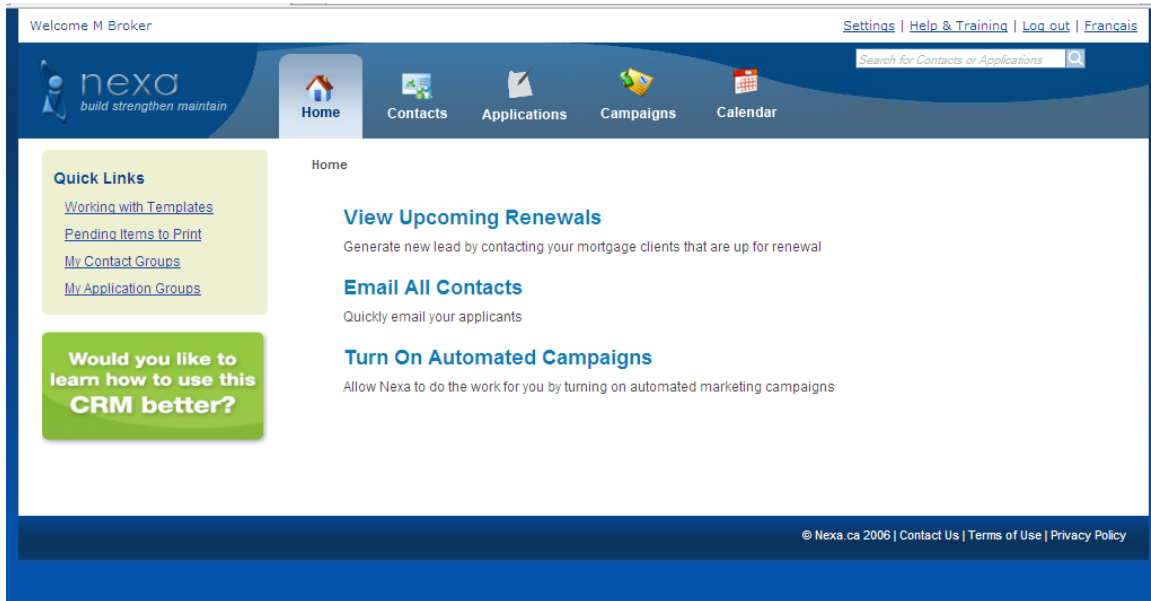
Login

[Forgot User Name](#)
[Forgot Password](#)

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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.

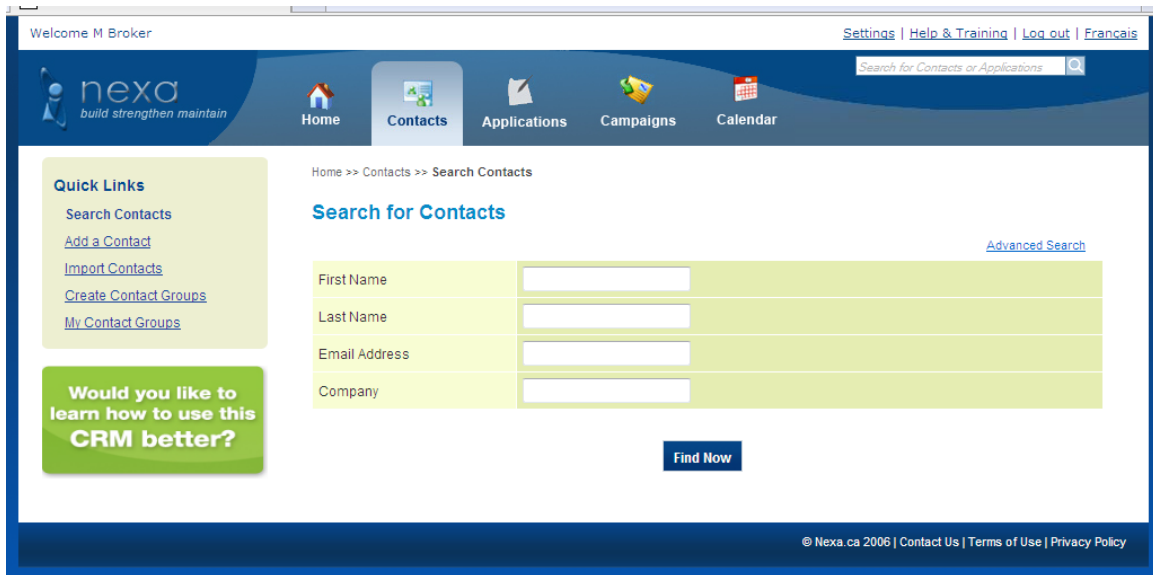
The 'Application' section of Nexa will contain all of the Mortgage Details.

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'.



The screenshot displays the Nexa CRM web application interface. At the top, a navigation bar includes links for 'Settings', 'Help & Training', 'Log out', and 'Francais'. Below this, a secondary navigation bar features icons for 'Home', 'Contacts' (which is highlighted), 'Applications', 'Campaigns', and 'Calendar'. The main content area is titled 'Search for Contacts' and contains a search form with four input fields: 'First Name', 'Last Name', 'Email Address', and 'Company'. A 'Find Now' button is positioned below the form. To the left of the search form, there is a 'Quick Links' section with links for 'Search Contacts', 'Add a Contact', 'Import Contacts', 'Create Contact Groups', and 'My Contact Groups'. A green box with the text 'Would you like to learn how to use this CRM better?' is also visible. The footer of the page contains the copyright notice '© Nexa.ca 2006' and links for 'Contact Us', 'Terms of Use', and 'Privacy Policy'.

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.

The screenshot shows the Nexa CRM interface. At the top, there's a navigation bar with 'Home', 'Contacts', 'Applications', 'Campaigns', and 'Calendar'. The 'Contacts' tab is active. Below the navigation bar, there's a 'Quick Links' sidebar with links like 'Search Contacts', 'Add a Contact', 'Import Contacts', 'Create Contact Groups', and 'My Contact Groups'. The main content area is titled 'Search for Contacts' and contains an 'Add a Search Criteria' section with two dropdown menus: 'What field are you searching on' and 'Choose your logic'. Below this is a 'Current Criteria' table with columns for Field, Operator, For, and Action. At the bottom right, there are 'Find Now' and 'New Search' buttons.

Welcome M Broker [Settings](#) | [Help & Training](#) | [Log out](#) | [Français](#)

[Search for Contacts or Applications](#)

Quick Links

- [Search Contacts](#)
- [Add a Contact](#)
- [Import Contacts](#)
- [Create Contact Groups](#)
- [My Contact Groups](#)

Would you like to learn how to use this CRM better?

Contacts >> Search Contacts >> Advanced Search

Search for Contacts

Add a Search Criteria [Quick Search](#)

What field are you searching on

Choose your logic

[+ Add This Criteria](#)

Current Criteria			
Field	Operator	For	Action

[Find Now](#) [New Search](#)

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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'.

The screenshot shows the 'Add New Contact' form in the Nexa CRM interface. The top navigation bar includes 'Home', 'Contacts', 'Applications', 'Campaigns', and 'Calendar'. The 'Contacts' tab is active, and the breadcrumb trail shows 'Contacts >> Add a Contact'. On the left, there is a 'Quick Links' sidebar with links for 'Search Contacts', 'Add a Contact', 'Import Contacts', 'Create Contact Groups', and 'My Contact Groups'. Below this is a green box asking 'Would you like to learn how to use this CRM better?'. The main form area has a title 'Add New Contact' and a sub-header 'Contacts >> Add a Contact'. It features a profile picture placeholder, a 'Flag to Follow Up' checkbox, and fields for 'Follow Up Date' and 'Follow Up Reason'. Below these are tabs for 'Overview' and 'Lead Details'. The 'General' tab is selected, showing a form with fields for 'First Name', 'Last Name', 'Company', 'Birthdate', 'Contact Type', and 'Contact Status'. To the right, the 'Email/ Phone' section includes fields for 'Work Email', 'Home Email', 'Work', 'Home', 'Mobile', and 'Default Email', with 'Home Email' selected as the default.

Quick Links

- [Search Contacts](#)
- [Add a Contact](#)
- [Import Contacts](#)
- [Create Contact Groups](#)
- [My Contact Groups](#)

Would you like to learn how to use this CRM better?

Add New Contact

Contacts >> Add a Contact

Flag to Follow Up ☐

Follow Up Date

Follow Up Reason

Overview **Lead Details**

General

First Name	<input type="text"/>	Work Email	<input type="text"/>
Last Name	<input type="text"/>	Home Email	<input type="text"/>
Company	<input type="text"/>	Work	<input type="text"/>
Birthdate	<input type="text"/>	Home	<input type="text"/>
Contact Type	Please Select	Mobile	<input type="text"/>
Contact Status	Please Select	Default Email	<input checked="" type="radio"/> Home Email

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'.

The screenshot shows the 'Search for Applications' page in the Nexa CRM. The top navigation bar includes 'Home', 'Contacts', 'Applications' (selected), 'Campaigns', and 'Calendar'. A search bar at the top right says 'Search for Contacts or Applications'. On the left, a 'Quick Links' sidebar lists: 'Search Applications', 'Add New Application', 'Import Applications', 'Create Application Groups', and 'My Application Groups'. Below this is a green box asking 'Would you like to learn how to use this CRM better?'. The main content area is titled 'Applications >> Search Applications' and 'Search for Applications'. It features three input fields: 'Applicant First Name', 'Applicant Last Name', and 'Application ID'. A 'Find Now' button is positioned below the fields. An 'Advanced Search' link is on the right. The footer contains copyright information: '© Nexa.ca 2006 | Contact Us | Terms of Use | Privacy Policy'.

Applicant First Name	<input type="text"/>
Applicant Last Name	<input type="text"/>
Application ID	<input type="text"/>

[Advanced Search](#)

Find Now

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’.

The screenshot shows the Nexa web application interface. At the top is a navigation bar with the Nexa logo and tabs for Home, Contacts, Applications (selected), Campaigns, and Calendar. A search bar at the top right contains the text "Search for Contacts or Applications". Below the navigation bar, the breadcrumb trail reads "Applications >> Search Applications >> Advanced Search".

On the left side, there is a "Quick Links" section with links: "Search Applications", "Add New Application", "Import Applications", "Create Application Groups", and "My Application Groups". Below this is a green box with the text "Would you like to learn how to use this CRM better?".

The main content area is titled "Search Applications". It features a section "Add a Search Criteria" with a "Quick Search" link. This section contains three input fields: "What fields would you like to choose?" with radio buttons for "Frequently Used Fields" (selected) and "All Fields"; "What field are you searching on" with a dropdown menu showing "Please Select"; and "Choose your logic" with a dropdown menu showing "Please Select". A "+ Add This Criteria" link is located to the right of these fields.

Below the input fields is a table titled "Current Criteria". The table has four columns: "Field", "Operator", "For", and "Action". The table is currently empty.

At the bottom right of the search area are two buttons: "Find Now" and "New Search". The footer of the page contains the copyright notice "© Nexa.ca 2006 | Contact Us | Terms of Use | Privacy Policy".

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”.

The screenshot shows the 'Add New Application' form in the Nexa CRM interface. The top navigation bar includes 'Home', 'Contacts', 'Applications' (selected), 'Campaigns', and 'Calendar'. A search bar on the right says 'Search for Contacts or Applications'. On the left, a 'Quick Links' sidebar lists: 'Search Applications', 'Add New Application', 'Import Applications', 'Create Application Groups', and 'My Application Groups'. Below this is a green box asking 'Would you like to learn how to use this CRM better?'. The main content area is titled 'Applications >> Add an Application' and 'Add New Application'. It features a document icon and three input fields: 'Flag to Follow Up' (checkbox), 'Follow Up Date' (calendar), and 'Follow Up Reason' (text). Below these are tabs: 'Overview' (selected), 'Requested Mortgages', 'Conditions', 'Client Fees', and 'Participants'. The 'General Information' section contains a table of input fields:

General Information	
Application ID	<input type="text"/>
Application Entry Date	<input type="text"/>
Existing Application ID or Loan Code #	<input type="text"/>
Application Source	<input type="text" value="Please Select"/>
Referring Website	<input type="text"/>
Application File Status	<input type="text" value="Please Select"/>
Application Marketing Status	<input type="text" value="Please Select"/>
CRM File Status	<input type="text" value="Please Select"/>
CRM File Status Date	<input type="text"/>
Synch with Expert?	<input checked="" type="checkbox"/>

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 built 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.

The screenshot shows the Nexa CRM interface. At the top, there's a navigation bar with 'Welcome M Broker' on the left and links for 'Settings', 'Help & Training', 'Log out', and 'Français' on the right. Below this is a main menu with icons for 'Home', 'Contacts', 'Applications' (which is highlighted), 'Campaigns', and 'Calendar'. A search bar is also present. On the left side, there's a 'Quick Links' section with links: 'Search Applications', 'Add New Application', 'Import Applications', 'Create Application Groups', and 'My Application Groups'. Below this is a green box asking 'Would you like to learn how to use this CRM better?'. The main content area is titled 'Applications >> Create Application Groups' and 'Create Application Groups'. It shows a two-step process: 'Step 1: Name the Group' (active) and 'Step 2: Filter by'. Under Step 1, it asks 'What Name would you like to give this group?' with an example: 'Applications Closing this Month' and 'Contact Emailing List'. There is a text input field and a 'Next Step' button. At the bottom, there's a footer with '© Nexa.ca 2006 | Contact Us | Terms of Use | Privacy Policy'.

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.

The screenshot shows the 'Create Application Groups' wizard in Step 2, 'Filter by'. The interface includes a top navigation bar with 'Home', 'Contacts', 'Applications' (active), 'Campaigns', and 'Calendar'. A search bar is present in the top right. On the left, there's a 'Quick Links' sidebar with links like 'Search Applications', 'Add New Application', 'Import Applications', 'Create Application Groups', and 'My Application Groups'. Below this is a green box asking 'Would you like to learn how to use this CRM better?'. The main content area is titled 'Applications >> Create Application Groups' and shows 'Step 1: Name the Group' and 'Step 2: Filter by'. A link 'Closings Last Month' is visible. A text box explains: 'Adding filter conditions will help you select unique criteria for this group. For example, Contacts where 'Contact Type' 'equals' 'Client''. Below this is the 'Add a Search Criteria' section with four fields: 'What fields would you like to choose?' (radio buttons for 'Frequently Used Fields' and 'All Fields'), 'What field are you searching on?' (dropdown menu showing 'Application File Status'), 'Choose your logic' (dropdown menu showing 'Equal To'), and 'What are you looking for?' (dropdown menu showing 'Closed'). A '+ Add This Criteria' link is at the bottom right. Below the criteria section is a 'Current Filters' table with columns: Field, Operator, For, and Action.

Current Filters			
Field	Operator	For	Action

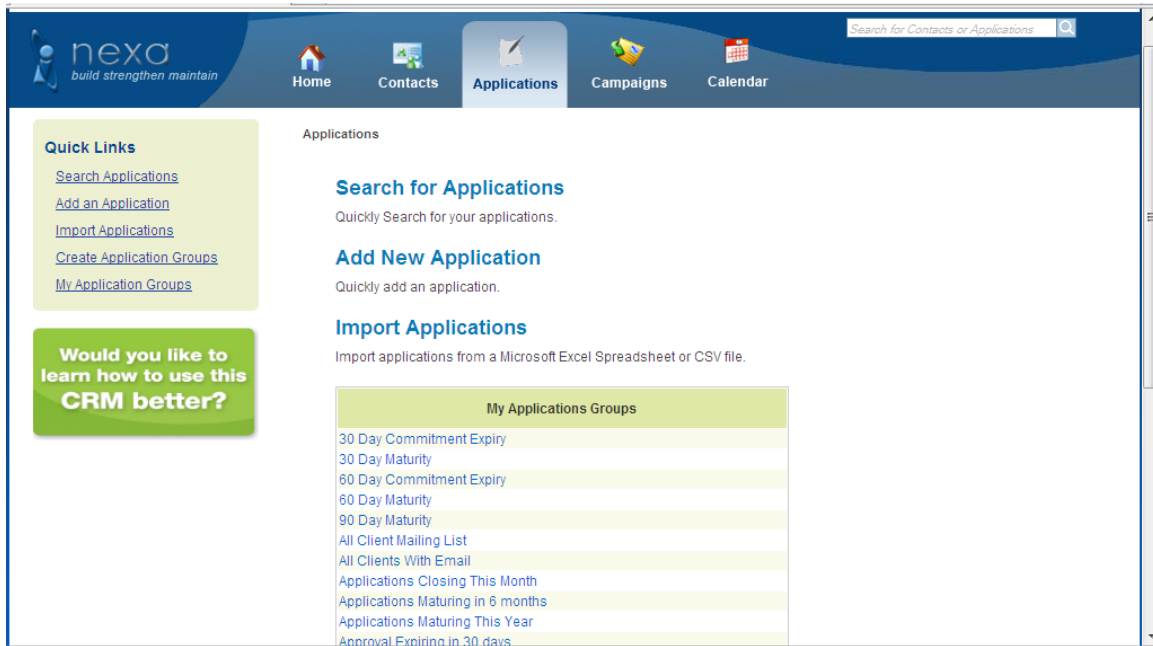
To create a filter you must fill in your criteria using 3 pieces of information. The first is the 'Field you are searching on'. From the drop down menu, select the field that you want to search. If the field you want to use is not in the drop down menu, select the "All fields" button above. Choose the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

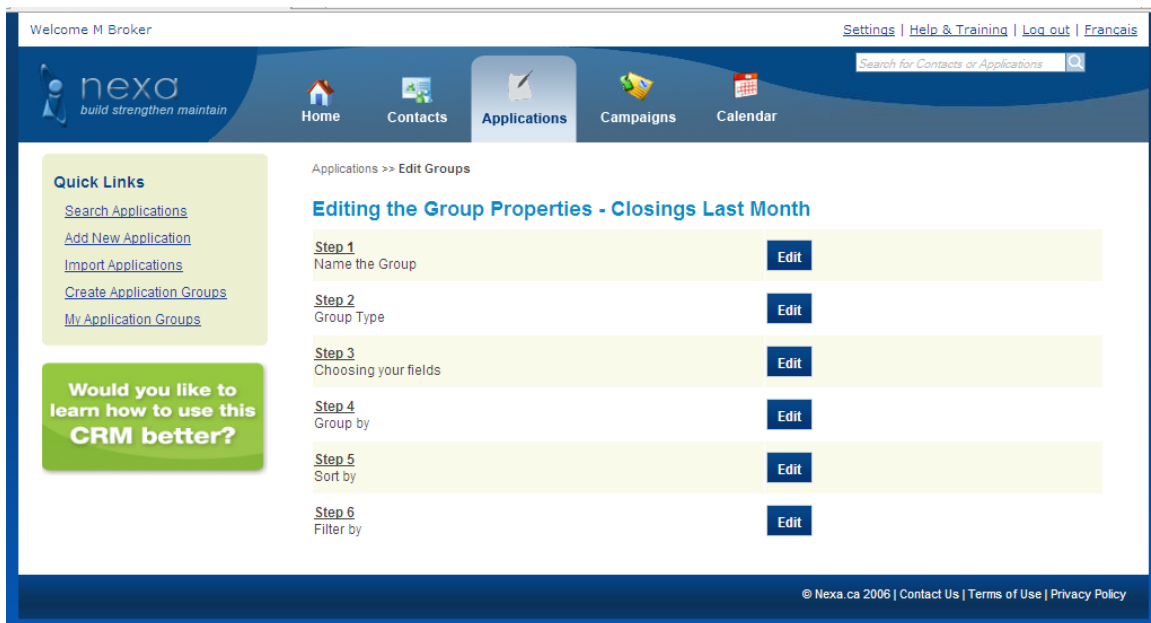


Under the My Contact Group or My Application Groups heading, click on the group you want to view. The group will open.

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.

The screenshot shows the Nexa CRM interface for editing group properties. The top navigation bar includes links for Home, Contacts, Applications (active), Campaigns, and Calendar. A search bar is located in the top right corner. The main content area is titled 'Applications >> Edit Groups' and 'Editing the Group Properties - Closings Last Month Step 3 - Fields'. A progress bar shows six steps: Step 1 (Name the Group), Step 2 (Group Type), Step 3 (Choosing your fields - active), Step 4 (Group by), Step 5 (Sort by), and Step 6 (Filter by). Below the progress bar, a dropdown menu labeled 'Show me' is set to 'Frequently Used Fields'. A message asks the user to select fields for display. Two lists are provided: 'available Fields' on the left and 'selected Fields' on the right. The 'available Fields' list includes: Agent on Deal Full Name, All Applicants Full Names, Applicant Beacon Score, Applicant Birthdate, Applicant Existing Client #, Applicant First Name, Applicant Home Email, Applicant Last Name, Applicant List Applicant As, Applicant Mailing Address, Applicant Mailing City, Applicant Mailing Prov/State, Application Entry Date, Application File Status, and Closing Date. The 'selected Fields' list includes: Application ID and Applicant 1 and Applicant 2 Full Names. Between the lists are '>' and '<' arrow buttons. To the right of the 'selected Fields' list are buttons for 'Move Up', 'Move Down', 'Total', 'Sum', 'Avg', 'Min', 'Max', and 'Remove'. A 'Done' button is at the bottom 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.

The screenshot shows the Nexa CRM interface for editing group properties. The top navigation bar includes links for Home, Contacts, Applications (active), Campaigns, and Calendar. A search bar is located in the top right. On the left, a 'Quick Links' sidebar lists options like Search Applications, Add New Application, Import Applications, Create Application Groups, and My Application Groups. Below this is a green box asking 'Would you like to learn how to use this CRM better?'. The main content area is titled 'Applications >> Edit Groups' and 'Editing the Group Properties - Closings Last Month Step 4 - Group by'. It features a progress bar with six steps: Step 1 (Name the Group), Step 2 (Group Type), Step 3 (Choosing your fields), Step 4 (Group by - active), Step 5 (Sort by), and Step 6 (Filter by). Below the progress bar, a text prompt asks 'How would you like this group, grouped by? For example, Group Contacts by Contact Birthdate Month.' A form with a 'Field' label and a 'Please Select' dropdown menu is provided. An 'Add Group By' button is located below the dropdown. Under the heading 'Current Group By', there is a table with two columns: 'Field' and 'Action'. At the bottom of the form, there are three buttons: 'Skip this Step', 'Save this Change', and 'Next Step'. The footer contains the copyright notice '© Nexa.ca 2006' and links for 'Contact Us', 'Terms of Use', and 'Privacy Policy'.

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.

Applications >> Edit Groups

Editing the Group Properties - Closings Last Month Step 5 - Sort by

Step 1 Name the Group Step 2 Group Type Step 3 Choosing your fields Step 4 Group by **Step 5 Sort by** Step 6 Filter by

[Closings Last Month](#)

How would you like this group, sorted?

Field

[Add Sort By](#)

Current Sort By

Field	Action
-------	--------

[Skip this Step](#) [Save this Change](#) [Next Step](#)

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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

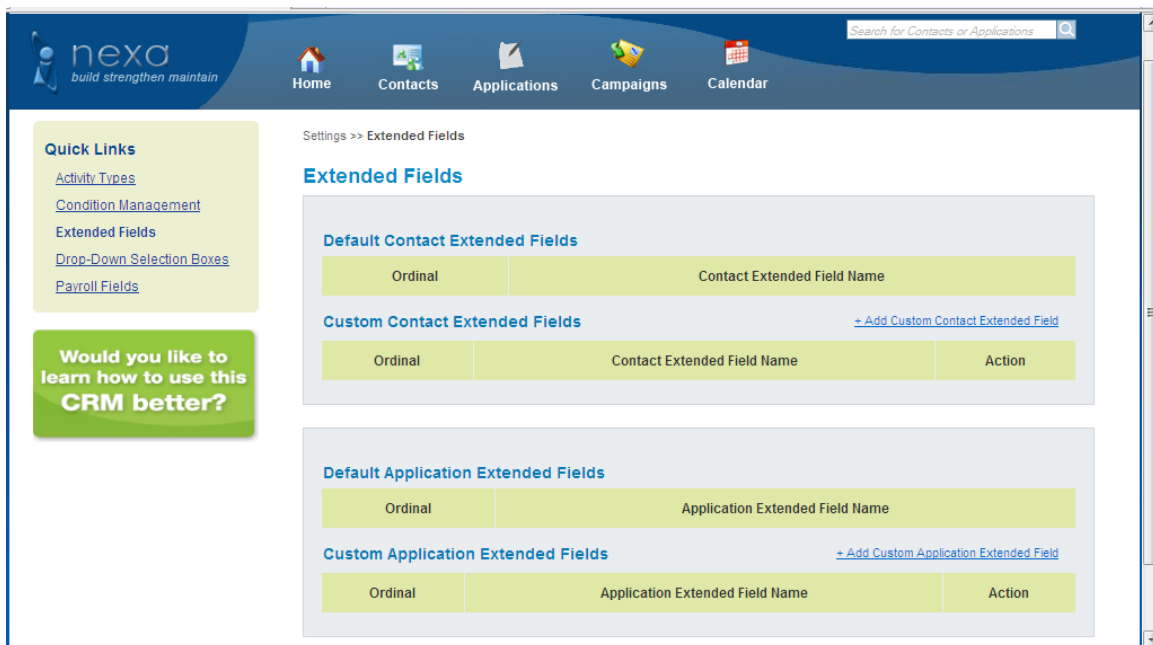
When creating groups in Nexa you have the choice of three addresses - the Current Address, the Property Address and the Mailing Address.

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.

The screenshot shows the Nexa CRM interface. The top navigation bar includes the Nexa logo with the tagline 'build strengthen maintain', and icons for Home, Contacts, Applications, Campaigns, and Calendar. A search bar is located on the right. On the left, a 'Quick Links' sidebar lists: Activity Types, Condition Management, Extended Fields, Drop-Down Selection Boxes, and Payroll Fields. Below this is a green box asking 'Would you like to learn how to use this CRM better?'. The main content area is titled 'Settings >> Extended Fields' and 'Add Custom Application Extended Field'. It contains two input fields: 'Name' (a text box) and 'Type' (a dropdown menu with 'Please Select' as the current selection). A blue button labeled 'Add Custom Application Extended Field' is positioned below these fields. The footer contains the copyright notice '© Nexa.ca 2006' and links for 'Contact Us', 'Terms of Use', and 'Privacy Policy'.

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.

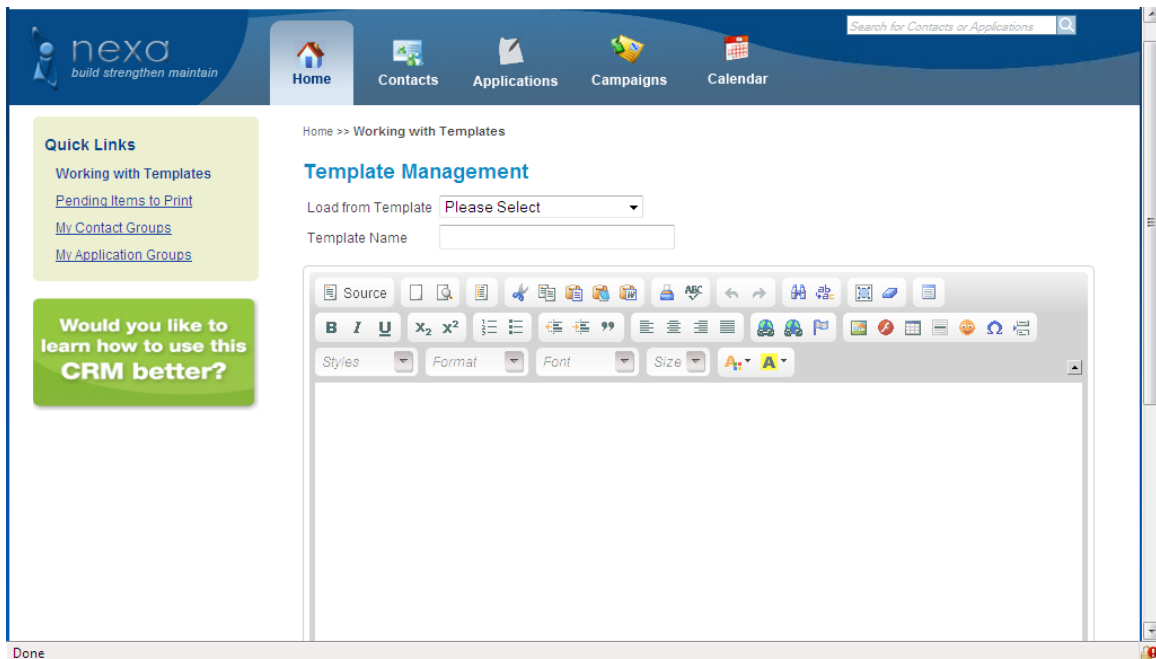
When completed choose “Add Custom Extended Field”.

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.

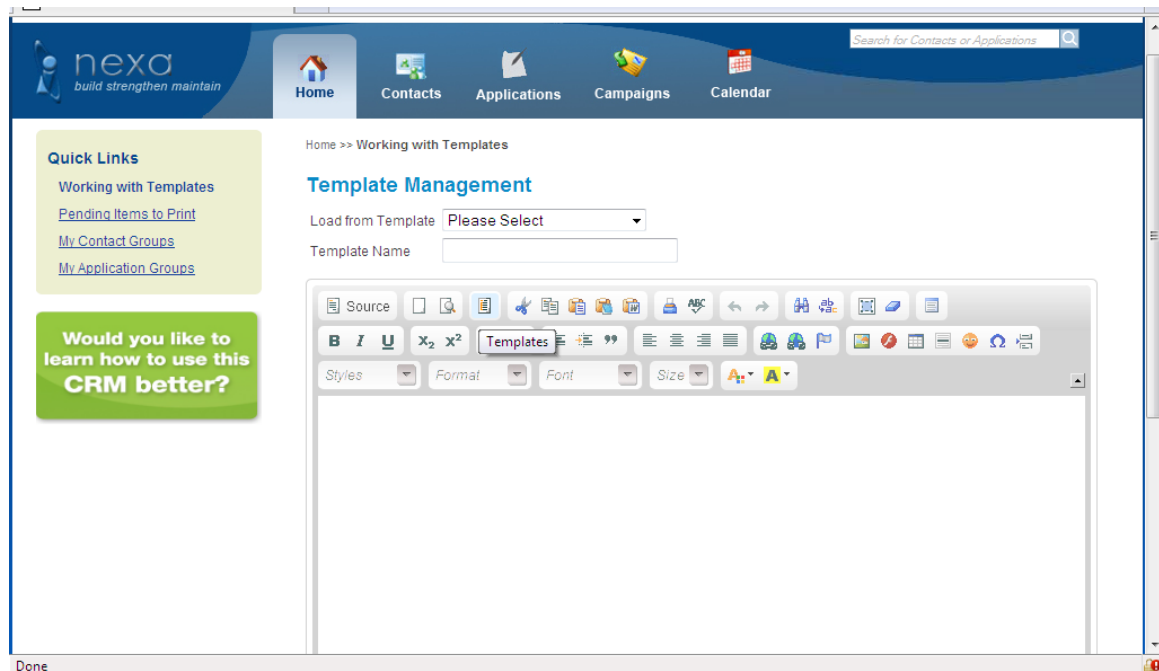
To access the template section of Nexa click on the “Working with Templates” link under the “Quick Links” heading on the homepage. This will open the Template Management screen.



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.

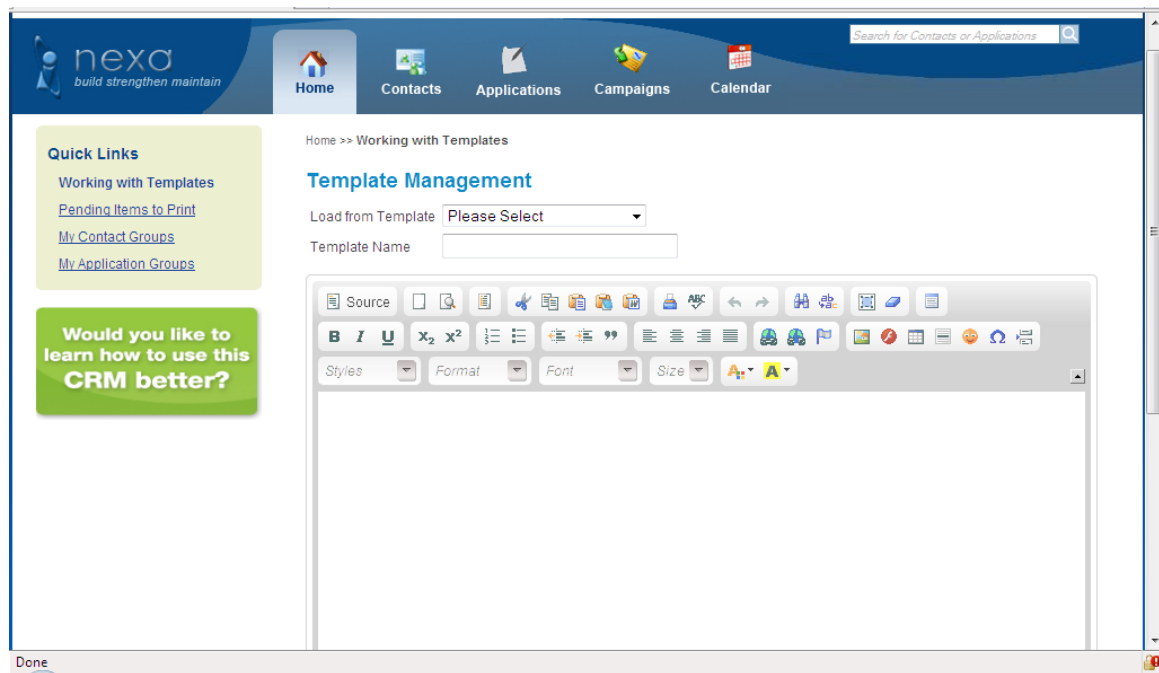
Once the template is open, you can edit the template by adding images and editing the text. After you have made your changes to the template, give the template a name in the “Template name” field and click on “Save New Template”.

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.

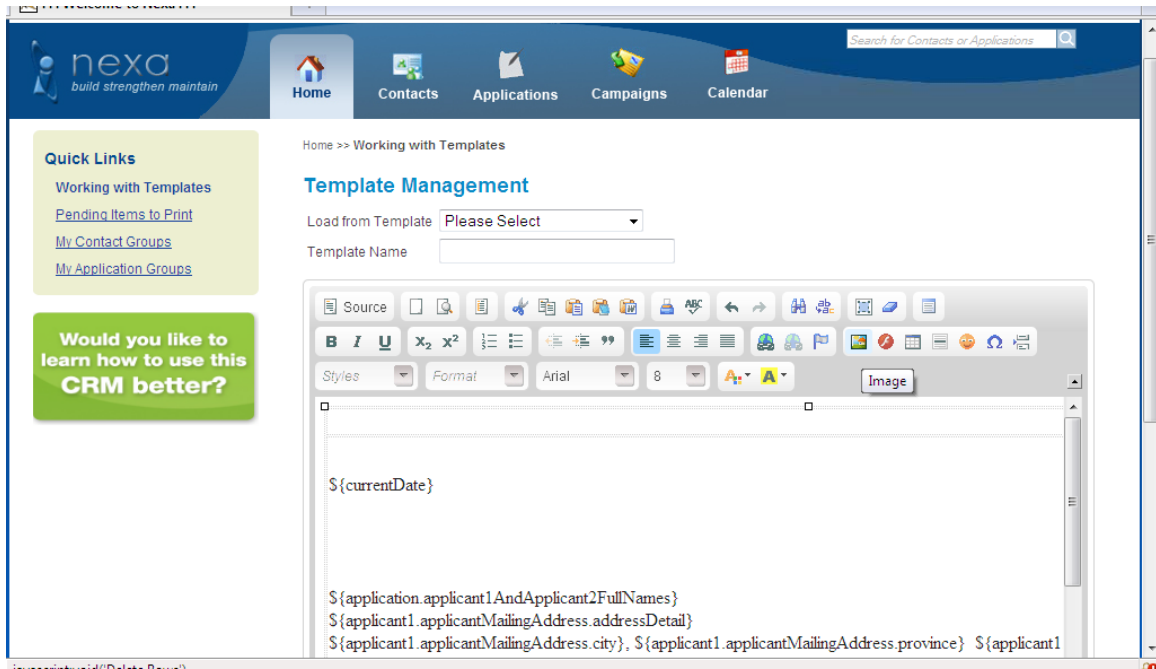


When your template is complete, enter a name for your template in the “Template Name” field and click ‘Save New Template’.

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’.

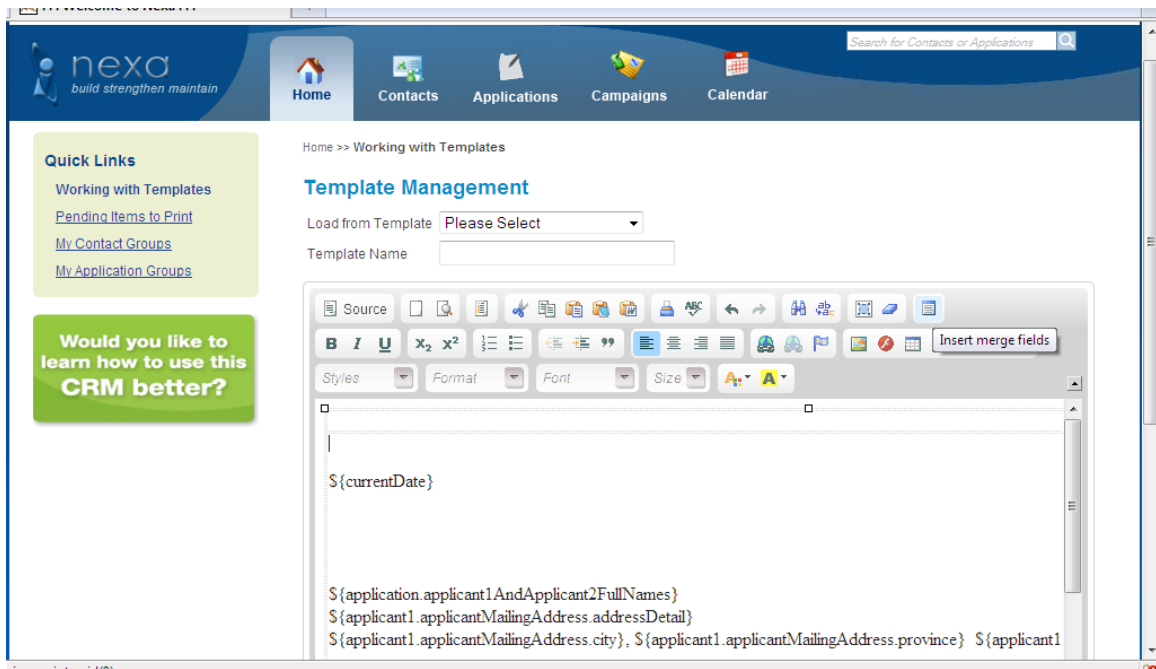
Any images you have already uploaded to Nexa will show on this screen. To upload a new image, click on ‘Browse’ at the top of the screen to find the image on your computer. Click on the image and click ‘Open’. Click ‘Upload’. This will upload the image to Nexa so it can be used again in future templates.

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.



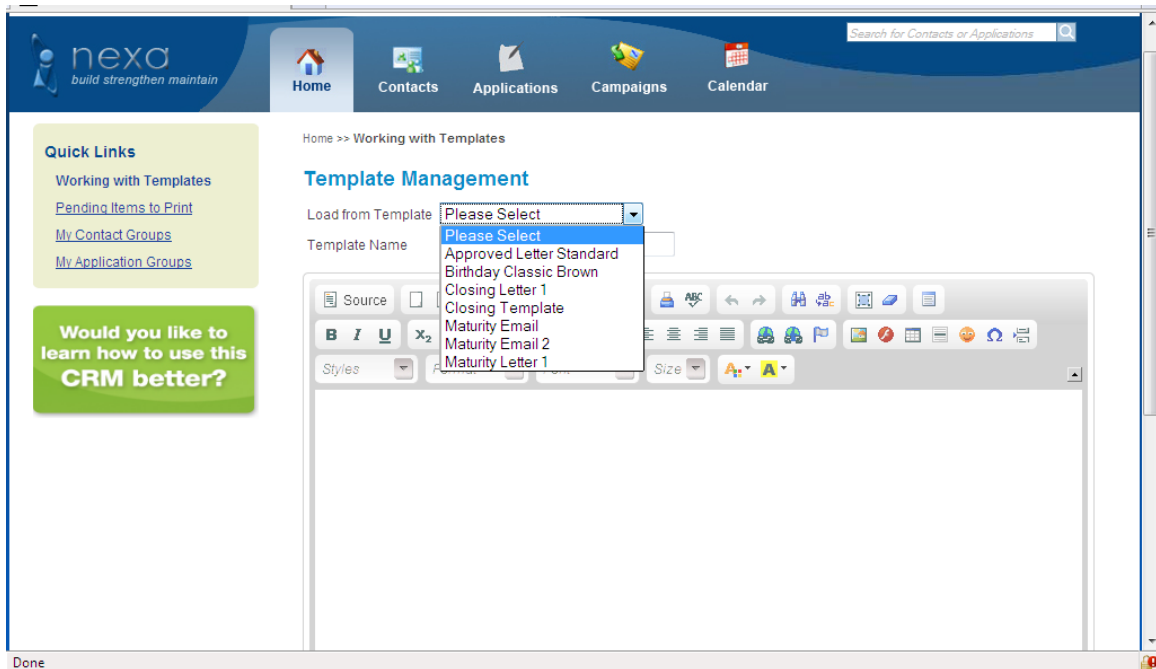
Scroll down the list of fields and click on the field you want to insert.

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'.

The screenshot shows the 'Send an Email' page in the Nexa CRM. The top navigation bar includes 'Home', 'Contacts', 'Applications' (selected), 'Campaigns', and 'Calendar'. A search bar is on the right. The left sidebar has 'Quick Links' and a green box asking 'Would you like to learn how to use this CRM better?'. The main content area has a breadcrumb trail: 'Home >> Applications >> Search Applications >> Edit Application >> Send an Email'. The 'Send an Email' section is divided into two parts. 'Part 1 - Who's It From?' contains fields for 'Name by which you would like your contacts to see this email message as from', 'Email address of the sender', 'Reply address', and 'Subject line', along with a checkbox for 'Send yourself a copy of this email'. 'Part 2 - Who's the email going to?' shows 'Application ID: 16900-1' and a 'Recipients' field with the email 'wayne@test.com'.

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'.

The screenshot shows the 'Send an Email' page in the Nexa CRM application. The top navigation bar includes 'Home', 'Contacts', 'Applications' (selected), 'Campaigns', and 'Calendar'. A search bar is located on the right. The left sidebar contains 'Quick Links' such as 'Search Applications', 'Add New Application', 'Import Applications', 'Create Application Groups', and 'My Application Groups'. A green box in the sidebar asks 'Would you like to learn how to use this CRM better?'. The main content area is titled 'Send an Email' and contains two parts: 'Part 1 - Who's It From?' and 'Part 2 - Who's the email going to?'. Part 1 includes fields for 'Name by which you would like your contacts to see this email message as from', 'Email address of the sender', 'Reply address', and 'Subject line', along with a checkbox for 'Send yourself a copy of this email'. Part 2 shows 'Application ID: 16900-1' and a 'Recipients' field with the email address 'wayne@test.com'.

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".

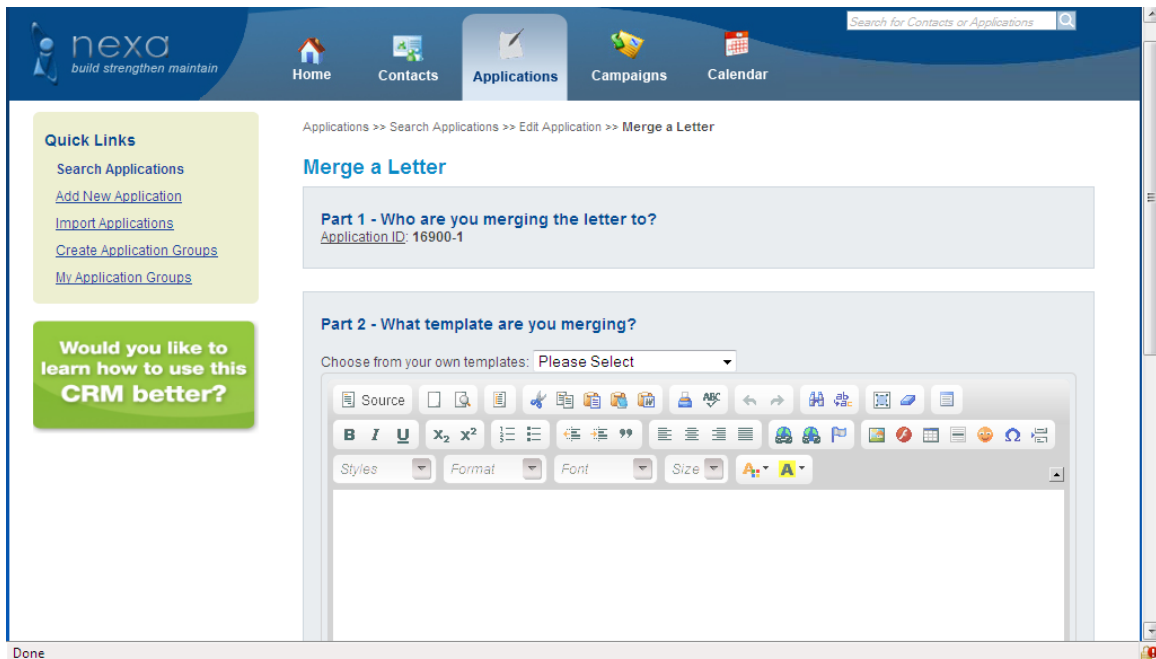
The Activity History on each of the client records will update with the date the email sent.

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'.



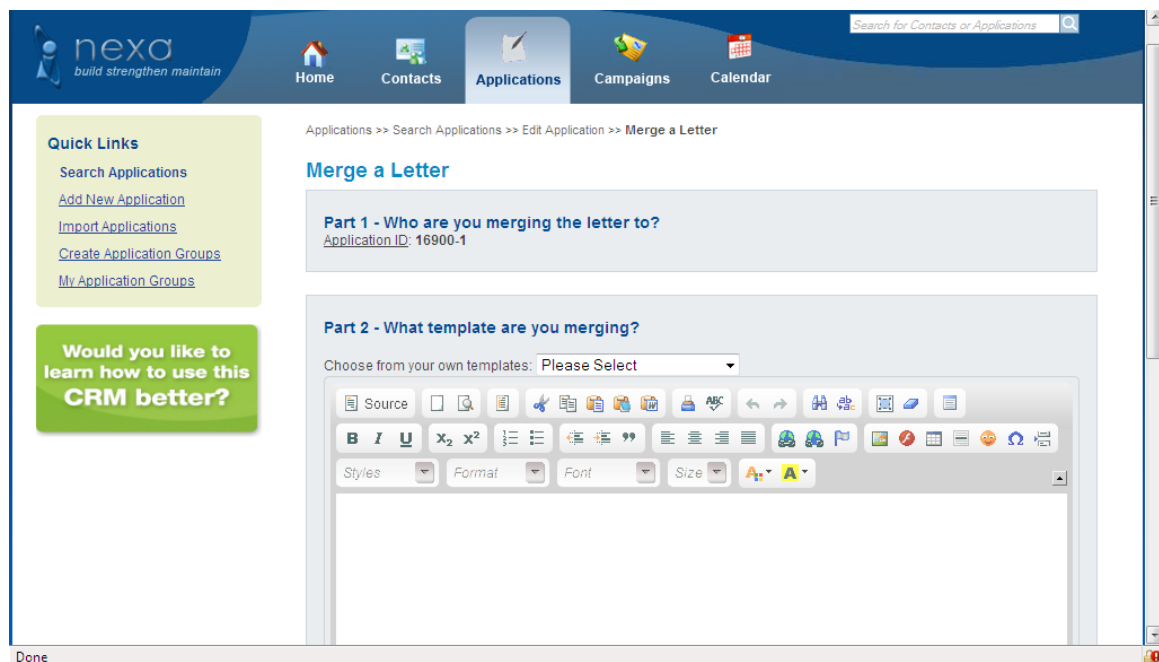
From the “Load from Template” drop down menu, choose the template you want to use to print out your letter. Click ‘OK’.

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'.

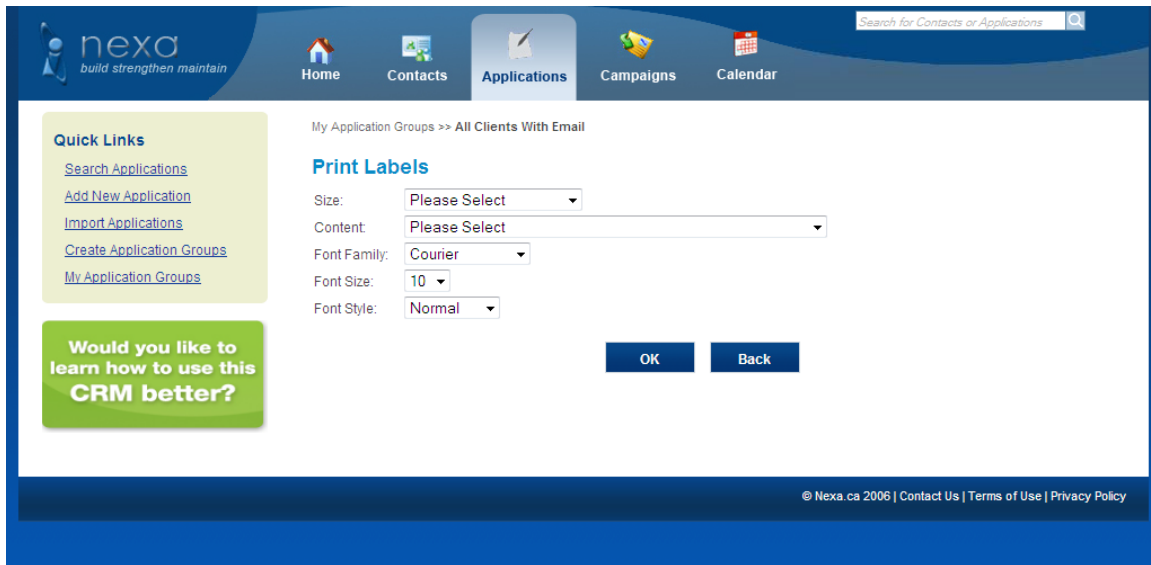


From the “Load from Template” drop down menu, choose the template you want to use to print out your letter. Click ‘OK’.

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'.



The screenshot shows the 'Print Labels' page in the Nexa CRM. The top navigation bar includes 'Home', 'Contacts', 'Applications' (selected), 'Campaigns', and 'Calendar'. A search bar is located in the top right corner. On the left, a 'Quick Links' sidebar contains links for 'Search Applications', 'Add New Application', 'Import Applications', 'Create Application Groups', and 'My Application Groups'. Below this is a green box asking 'Would you like to learn how to use this CRM better?'. The main content area is titled 'My Application Groups >> All Clients With Email' and 'Print Labels'. It features four dropdown menus: 'Size' (Please Select), 'Content' (Please Select), 'Font Family' (Courier), and 'Font Size' (10). The 'Font Style' is set to 'Normal'. At the bottom right of the form are 'OK' and 'Back' buttons. The footer contains the copyright notice '© Nexa.ca 2006' and links for 'Contact Us', 'Terms of Use', and 'Privacy Policy'.

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.

The screenshot shows the Nexa CRM interface. At the top, there's a navigation bar with 'Home', 'Contacts', 'Applications', 'Campaigns' (selected), and 'Calendar'. Below this, a 'Quick Links' sidebar on the left contains 'Create New Campaign'. The main area is titled 'Campaigns' and shows a 6-step wizard. Step 1, 'Name', is active and asks 'What name would you like to give this campaign?'. The input field contains 'Notification of Maturities'. A 'Next Step' button is visible. A green box on the left asks 'Would you like to learn how to use this CRM better?'. The footer contains copyright information: '© Nexa.ca 2006 | Contact Us | Terms of Use | Privacy Policy'.

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Search for Contacts or Applications

nexa
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Home Contacts Applications **Campaigns** Calendar

Quick Links
Create New Campaign

Would you like to learn how to use this CRM better?

Campaigns

Step 1 **Name** Step 2 Print, Email or Notify? Step 3 Who Step 4 What Template? Step 5 When? Step 6 From?

What name would you like to give this campaign?

Next Step

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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”.

The screenshot shows the Nexa CRM interface for creating a campaign. The top navigation bar includes links for Settings, Help & Training, Log out, and Français. The main navigation bar has icons for Home, Contacts, Applications, Campaigns (selected), and Calendar. A search bar is located on the right. On the left, there is a 'Quick Links' section with a 'Create New Campaign' button and a green box asking 'Would you like to learn how to use this CRM better?'. The main content area is titled 'Campaigns' and shows a progress bar with six steps: Step 1 Name, Step 2 Print, Email or Notify? (selected), Step 3 Who, Step 4 What Template?, Step 5 When?, and Step 6 From?. Below the progress bar, the title 'Notification of Maturities' is displayed. The section 'The type of action that will be performed is:' contains three radio button options: 'An email to my contact(s)' (unselected), 'A printed piece' (unselected), and 'A notification or reminder' (selected). Each option has a descriptive text block. A 'Next Step' button is located at the bottom right of the form area. The footer contains the copyright notice '© Nexa.ca 2006' and links for Contact Us, Terms of Use, and Privacy Policy.

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Search for Contacts or Applications

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Home Contacts Applications Campaigns Calendar

Quick Links
Create New Campaign

Would you like to learn how to use this CRM better?

Campaigns

Step 1 Name Step 2 Print, Email or Notify? Step 3 Who Step 4 What Template? Step 5 When? Step 6 From?

Notification of Maturities

The type of action that will be performed is:

☐ An email to my contact(s)
This option will allow you to email the group or Contact you selected in Step 3 the message of your choice.

☐ A printed piece
This option will allow you to execute a printed message for the group or Contact you selected in Step 3 the message of your choice.

☒ A notification or reminder
This option will allow you to send a reminder or notification to yourself, your staff or recipient of your choosing a message concerning this contact or group.

Next Step

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Click “Next Step.”

Creating a Campaign – Email Notification or Reminder – Step 3

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

Quick Links
Create New Campaign

Would you like to learn how to use this CRM better?

Campaigns

Step 1 Name Step 2 Print, Email or Notify? **Step 3 Who** Step 4 What Template? Step 5 When? Step 6 From?

Notification of Maturities Notification or Reminder

Which groups of contacts or applications does this Campaign apply to?

Groups of Applications
<input type="checkbox"/> 30 Day Commitment Expiry
<input type="checkbox"/> 30 Day Maturity
<input type="checkbox"/> 60 Day Commitment Expiry
<input type="checkbox"/> 60 Day Maturity
<input type="checkbox"/> 90 Day Maturity
<input type="checkbox"/> All Client Mailing List
<input type="checkbox"/> All Clients With Email
<input type="checkbox"/> all contacts
<input type="checkbox"/> All Contacts with Email Address
<input type="checkbox"/> Applications Closing This Month
<input type="checkbox"/> Applications Maturing in 6 months
<input type="checkbox"/> Applications Maturing This Year
<input type="checkbox"/> Approval Expiring in 30 days

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 screenshot shows the 'Create Campaign' wizard in the Nexa CRM system, specifically Step 4: 'What Template?'. The interface includes a top navigation bar with 'Home', 'Contacts', 'Applications', 'Campaigns', and 'Calendar'. A sidebar on the left contains 'Quick Links' and a green box asking 'Would you like to learn how to use this CRM better?'. The main content area shows a progress bar with six steps: Step 1 (Name), Step 2 (Print, Email or Notify?), Step 3 (Who), Step 4 (What Template?), Step 5 (When?), and Step 6 (From?). Below the progress bar, the title is 'Notification of Maturities Notification or Reminder'. The question 'What template would you like to use?' is followed by two radio button options: 'Select an existing email template' (selected) and 'Just use this quick message'. The 'Select an existing email template' option is linked to a dropdown menu currently showing 'Please Select' and a 'Go Create a Template' link. A large text area for writing a quick message is visible below the radio buttons. A 'Next Step' button is at the bottom right. The footer contains copyright information: '© Nexa.ca 2006 | Contact Us | Terms of Use | Privacy Policy'.

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.

The screenshot shows the Nexa CRM interface. At the top, there's a navigation bar with 'Home', 'Contacts', 'Applications', 'Campaigns' (selected), and 'Calendar'. Below this, a 'Quick Links' section contains a 'Create New Campaign' button. A green box asks, 'Would you like to learn how to use this CRM better?'. The main area is titled 'Campaigns' and shows a progress bar with six steps: Step 1 Name, Step 2 Print, Email or Notify?, Step 3 Who, Step 4 What Template?, Step 5 When? (selected), and Step 6 From?. Under Step 5, the heading is 'Notification of Maturities Notification or Reminder'. Below this, it asks 'When would you like this Campaign to run?'. There are two sections: 'Execution Time' with a dropdown menu set to '09:00', and 'Recurrence Pattern' with radio buttons for 'Daily', 'Weekly' (selected), 'Monthly', and 'Yearly'. The 'Weekly' option is further configured with 'Every 1 week(s) on:' and checkboxes for days of the week, with 'Monday' selected. A 'Next Step' button is at the bottom right of the form area. The footer contains copyright information: '© Nexa.ca 2006 | Contact Us | Terms of Use | Privacy Policy'.

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.

The screenshot shows the 'Campaigns' page in the Nexa CRM system, specifically Step 6: From?. The page has a blue header with the Nexa logo and navigation links: Home, Contacts, Applications, Campaigns (active), and Calendar. A search bar is also present. On the left, there's a 'Quick Links' section with a 'Create New Campaign' button and a green box asking 'Would you like to learn how to use this CRM better?'. The main content area shows the campaign setup progress: Step 1 Name, Step 2 Print, Email or Notify?, Step 3 Who, Step 4 What Template?, Step 5 When?, and Step 6 From? (active). The campaign name is 'Notification of Maturities Notification or Reminder'. The frequency is set to 'Every 1 week(s) on: Monday'. A text box labeled 'Who would you like this notification to go to?' contains the placeholder 'Type in Email address'. A 'Save' button is at the bottom right. The footer includes copyright information: '© Nexa.ca 2006 | Contact Us | Terms of Use | Privacy Policy'.

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.

The screenshot shows the Nexa CRM interface. At the top, there's a navigation bar with 'Home', 'Contacts', 'Applications', 'Campaigns' (selected), and 'Calendar'. Below this is a 'Quick Links' section with a 'Create New Campaign' button. A green box asks 'Would you like to learn how to use this CRM better?'. The main area is titled 'Campaigns' and shows a 6-step wizard. Step 1, 'Name', is active. It asks 'What name would you like to give this campaign?' with a text input field containing 'Maturing in 6 Month Email'. A 'Next Step' button is at the bottom right. The footer contains copyright information and links for 'Contact Us', 'Terms of Use', and 'Privacy Policy'.

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Home Contacts Applications **Campaigns** Calendar

Search for Contacts or Applications

Quick Links

Create New Campaign

Would you like to learn how to use this CRM better?

Campaigns

Step 1 Name Step 2 Print, Email or Notify? Step 3 Who Step 4 What Template? Step 5 When? Step 6 From?

What name would you like to give this campaign?

Next Step

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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.

The screenshot shows the 'Create New Campaign' interface in the Nexa CRM. The top navigation bar includes 'Home', 'Contacts', 'Applications', 'Campaigns' (active), and 'Calendar'. A 'Quick Links' sidebar on the left contains 'Create New Campaign' and a green box asking 'Would you like to learn how to use this CRM better?'. The main content area is titled 'Campaigns' and shows a progress bar with six steps: Step 1 Name, Step 2 Print, Email or Notify? (active), Step 3 Who, Step 4 What Template?, Step 5 When?, and Step 6 From?. Below the progress bar, a link 'Maturing in 6 Month Email' is visible. The section 'The type of action that will be performed is:' contains three radio button options: 'An email to my contact(s)' (selected), 'A printed piece', and 'A notification or reminder'. Each option has a descriptive text block. A 'Next Step' button is located at the bottom right of the form area. The footer contains the copyright notice '© Nexa.ca 2006 | Contact Us | Terms of Use | Privacy Policy'.

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Search for Contacts or Applications

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Home Contacts Applications Campaigns Calendar

Quick Links

Create New Campaign

Would you like to learn how to use this CRM better?

Campaigns

Step 1 Name Step 2 Print, Email or Notify? Step 3 Who Step 4 What Template? Step 5 When? Step 6 From?

Maturing in 6 Month Email

The type of action that will be performed is:

☒ An email to my contact(s)
This option will allow you to email the group or Contact you selected in Step 3 the message of your choice.

☐ A printed piece
This option will allow you to execute a printed message for the group or Contact you selected in Step 3 the message of your choice.

☐ A notification or reminder
This option will allow you to send a reminder or notification to yourself, your staff or recipient of your choosing a message concerning this contact or group.

Next Step

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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.

The screenshot shows the Nexa CRM interface for creating a campaign. The top navigation bar includes 'Home', 'Contacts', 'Applications', 'Campaigns' (active), and 'Calendar'. A search bar is located on the right. On the left, there are 'Quick Links' including 'Create New Campaign' and a green box asking 'Would you like to learn how to use this CRM better?'. The main area is titled 'Campaigns' and shows a progress bar with six steps: Step 1 Name, Step 2 Print, Email or Notify?, Step 3 Who (active), Step 4 What Template?, Step 5 When?, and Step 6 From?. Below the progress bar, there are links for 'Maturing in 6 Month' and 'Email'. A section titled 'Which groups of contacts or applications does this Campaign apply to?' contains two columns of checkboxes. The 'Groups of Contacts' column includes 'All Contacts with Email Address', 'Birthday Email', 'Leads Daily', and 'all contacts'. The 'Groups of Applications' column includes '30 Day Commitment Expiry', '30 Day Maturity', '60 Day Commitment Expiry', '60 Day Maturity', '90 Day Maturity', 'All Client Mailing List', 'All Clients With Email', 'Applications Closing This Month', 'Applications Maturing This Year', 'Applications Maturing in 6 months', 'Approval Expiring in 30 days', 'Approved Mortgages', and 'Birthdays-Applicants'.

Groups of Contacts	Groups of Applications
<input type="checkbox"/> All Contacts with Email Address	<input type="checkbox"/> 30 Day Commitment Expiry
<input type="checkbox"/> Birthday Email	<input type="checkbox"/> 30 Day Maturity
<input type="checkbox"/> Leads Daily	<input type="checkbox"/> 60 Day Commitment Expiry
<input type="checkbox"/> all contacts	<input type="checkbox"/> 60 Day Maturity
	<input type="checkbox"/> 90 Day Maturity
	<input type="checkbox"/> All Client Mailing List
	<input type="checkbox"/> All Clients With Email
	<input type="checkbox"/> Applications Closing This Month
	<input type="checkbox"/> Applications Maturing This Year
	<input type="checkbox"/> Applications Maturing in 6 months
	<input type="checkbox"/> Approval Expiring in 30 days
	<input type="checkbox"/> Approved Mortgages
	<input type="checkbox"/> Birthdays-Applicants

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.

The screenshot shows the 'Create New Campaign' wizard in the Nexa CRM, specifically Step 4: 'What Template?'. The interface includes a top navigation bar with 'Home', 'Contacts', 'Applications', 'Campaigns', and 'Calendar'. A 'Quick Links' sidebar on the left contains 'Create New Campaign' and a green box asking 'Would you like to learn how to use this CRM better?'. The main area shows a progress bar with six steps: Step 1 (Name), Step 2 (Print, Email or Notify?), Step 3 (Who), Step 4 (What Template?), Step 5 (When?), and Step 6 (From?). Below the progress bar, the 'What template would you like to use?' section has two radio buttons: 'Select an existing email template' (selected) and 'Just use this quick message'. A dropdown menu is open for 'Select an existing email template', showing options: 'Please Select', 'Approved Letter Standard', 'Birthday Classic Brown', 'Closing Letter 1', 'Closing Template', 'Maturity Email', 'Maturity Email 2', and 'Maturity Letter 1'. A 'Go Create a Template' link is also present. A 'Next Step' button is at the bottom right. The footer contains copyright information: '© Nexa.ca 2006 | Contact Us | Terms of Use | Privacy Policy'.

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.

The screenshot shows the 'Campaigns' section of the Nexa CRM interface. The 'Campaigns' tab is selected in the top navigation bar. Below the navigation bar, there is a 'Quick Links' section with a 'Create New Campaign' button and a green box asking 'Would you like to learn how to use this CRM better?'. The main content area is titled 'Campaigns' and shows a progress bar with six steps: Step 1 Name, Step 2 Print, Email or Notify?, Step 3 Who, Step 4 What Template?, Step 5 When?, and Step 6 From?. Step 5 is currently active. Below the progress bar, there is a section titled 'When would you like this Campaign to run?'. This section contains two main fields: 'Execution Time' and 'Recurrence Pattern'. The 'Execution Time' field has a dropdown menu set to '09:00'. The 'Recurrence Pattern' field has radio buttons for 'Daily', 'Weekly', 'Monthly', and 'Yearly'. The 'Monthly' option is selected. Below the radio buttons, there is a text input field showing 'Day 1 of every 1 month(s)'. Below the 'Recurrence Pattern' field, there is a 'Next Step' button.

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.

Quick Links
Create New Campaign

Would you like to learn how to use this CRM better?

Campaigns

Step 1 Name	Step 2 Print, Email or Notify?	Step 3 Who	Step 4 What Template?	Step 5 When?	Step 6 From?
Maturing in 6 Month Email	Email		Maturity Email	Day 1 of every 1 month(s)	

When the Campaign is sent out it comes from

Your Name

Your Email Address

Reply address

Subject line

☐ Send yourself a copy

☐ Send a copy to

Save

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.

The screenshot shows the 'Import Applications' page in the Nexa CRM. The top navigation bar includes links for 'Settings', 'Help & Training', 'Log out', and 'Francais'. The main navigation tabs are 'Home', 'Contacts', 'Applications' (selected), 'Campaigns', and 'Calendar'. A search bar is present on the right. On the left, a 'Quick Links' sidebar lists options like 'Search Applications', 'Add New Application', 'Import Applications', 'Create Application Groups', and 'My Application Groups'. Below this is a green box asking 'Would you like to learn how to use this CRM better?'. The main content area is titled 'Applications >> Import Applications' and 'Upload file'. It features a progress bar with four steps: 'Step 1: Upload file' (active), 'Step 2: Duplicate Applications', 'Step 3: Map fields', and 'Step 4: Import'. A 'View Import History' link is on the right. Below the progress bar, there is a 'File to Import' section with a text input field and a 'Browse...' button. A red note states: 'Please note the file you are uploading must be an CSV or XLS file'. A 'Next Step' button is at the bottom right. The footer contains copyright information: '© Nexa.ca 2006 | Contact Us | Terms of Use | Privacy Policy'.

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.

The screenshot shows the Nexa CRM interface. At the top, there's a navigation bar with 'Home', 'Contacts', 'Applications' (selected), 'Campaigns', and 'Calendar'. Below this is a 'Quick Links' sidebar with links like 'Search Applications', 'Add New Application', 'Import Applications', 'Create Application Groups', and 'My Application Groups'. The main content area is titled 'Applications >> Import Applications' and 'Duplication Strategy'. It shows a progress bar with four steps: Step 1 (Upload file), Step 2 (Duplicate Applications - active), Step 3 (Map fields), and Step 4 (Import). Below the progress bar, it says 'Select duplication strategy to import' and lists three radio button options: 'Update duplicates with items imported', 'Allow duplicates to be created', and 'Do not import duplicate applications'. There are 'Previous Step' and 'Next Step' buttons at the bottom. A green box on the left asks 'Would you like to learn how to use this CRM better?'. The footer contains copyright information: '© Nexa.ca 2006 | Contact Us | Terms of Use | Privacy Policy'.

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.

The screenshot shows the Nexa web application interface. The top navigation bar includes links for Home, Contacts, Applications (selected), Campaigns, and Calendar. A search bar is located on the right. On the left, there is a 'Quick Links' section with links for Search Applications, Add New Application, Import Applications, Create Application Groups, and My Application Groups. Below this is a green box asking 'Would you like to learn how to use this CRM better?'. The main content area is titled 'Applications >> Import Applications' and 'Map fields'. It shows a progress bar with four steps: Step 1 (Upload file), Step 2 (Duplicate Applications), Step 3 (Map fields - active), and Step 4 (Import). A link for 'View Import History' is on the right. The 'Map fields' section is titled 'Map your file's fields to fields in the system'. It contains two columns: 'System fields' and 'Your file's fields'. The 'System fields' column lists various fields like 'Agent on Deal Business Email', 'Agent on Deal Business Fax', 'Agent on Deal Business Phone', 'Agent on Deal Company', 'Agent on Deal Current Address', 'Agent on Deal Current City', 'Agent on Deal Current Country', 'Agent on Deal Current Postal/Zip', 'Agent on Deal Current Prov/State', 'Agent on Deal First Name', 'Agent on Deal ID', 'Agent on Deal Last Name', and 'Agent on Deal Middle Name'. The 'Your file's fields' column contains a list of 'Please Select' dropdown menus for mapping the spreadsheet columns to the system fields.

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