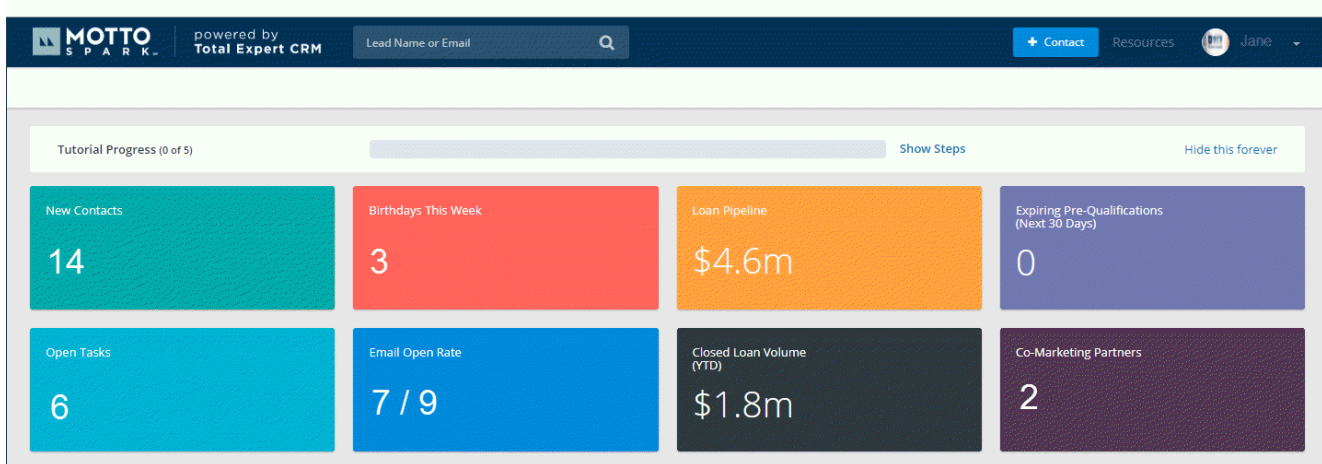




What is MottoSpark™?

MottoSpark™ is a Customer Management System (CRM) empowered by Total Expert designed to empower you and your team, aligns sales, marketing and compliance—all in one user-friendly platform.



Action Item: Complete your Account Setup

1. Check your profile settings to ensure everything is correct (**Name > Account Settings**)
 - a. If not, contact help@mottomortgage.com or 866-MOTTO-60
2. Verify your contacts have been imported from Encompass and all information is correct (**Leads & Contacts > Contacts**)
3. Create contact Groups (**Leads & Contacts > Groups**)
4. Add your State License to auto-populate State Disclaimers in your Marketing materials
 - a. **Name > Disclaimers > Click + Create** for each State License

Action Item: Opt-in to the Loan Milestones Campaign

First ensure all Loans in your Encompass pipeline are at the correct, real-time Milestone, then opt in to the Loan Milestones Auto-Campaign in MottoSpark™ (**Auto-Campaigns > Loan Milestones > Actions > Edit Group Assignment**). The Loan Milestones campaign sends automated notification emails to borrowers based on their progression through the loan process in Encompass.

MottoSpark™ Additional Resources

- [Click Here](#) for a guide on how to view and edit a Lead Source.
- [Click Here](#) for a guide on how to import a list of Contacts using a .csv file.
- [Click Here](#) for a guide on how to create Groups and Smart Groups.
- [Click Here](#) to learn about the benefits of Co-Marketing

Pro Tip: The MottoSpark input form in Encompass displays all fields Encompass feeds to the CRM so you can easily find and update information. All loan data updates will display in MottoSpark™ within one hour after saving the change in Encompass.