

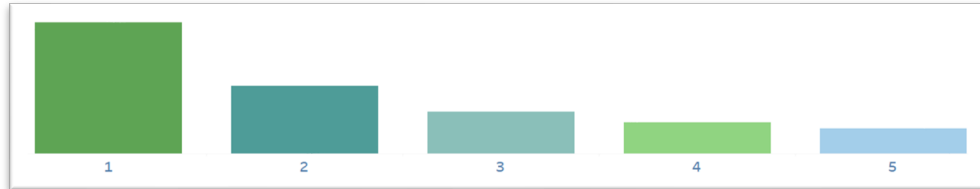
## The ProPair Challenge

### See your data inside of ProPair ML applications...

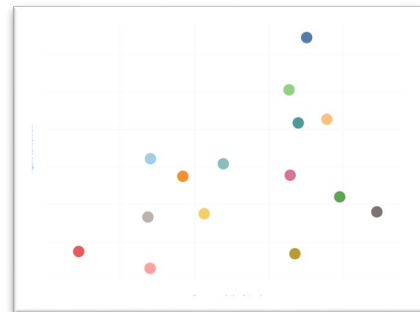
A quick and easy way to view RANK & MATCH results within 2-3 business days! ProPair will complete a preliminary evaluation and customize our two core products, to share with you.

You'll see how ALL of your leads are...

1. Distributed through **RANK** bins, from high value to low value



2. Assigned to LO's by their individual **MATCH** recommendation rate and lead distribution



### 3 easy steps...

1. Pull lead, loan and sales agent data (details enclosed) and upload to ProPair;
2. Respond to clarifying questions on your data; and
3. Gather your data lovers and innovators for a firsthand look at your data in ProPair's RANK & MATCH applications!

## Pull your Data

Pull historical lead, loan and sales agent data from the last 12 months, from these data sources:

1. Lead data: pulled from Lead Management Software (LMS) or CRM
2. Loan data: pulled from Loan Origination Software (LOS)
3. Sales Agent data: pulled from HR system or LMS/ CRM

### Lead Data

1. Create the **Lead report** in the LMS/ CRM and name: "PP\_Demo\_Lead"
  - Date range: Last 12 months
  - Once run, "Export to Text", save as a CSV and keep file in Download folder (or elsewhere)
  - Fields:

Field	Source
Lead Source	LMS Lead Detail
Lead Provider	LMS Lead Detail
Status	LMS Lead Detail
Current User/ Lead Owner	LMS Lead Detail
Lead Source Group	LMS Lead Detail
Channel	LMS Lead Detail
Credit Profile	LMS Lead Detail
Credit Score	LMS Lead Detail
Cash Out Amount	LMS Lead Detail
Datetime Added	LMS Lead Detail
Existing Home Value	LMS Lead Detail
First Assignment / Distribution Date	LMS Lead Detail
First Assignment / Distribution User	LMS Lead Detail
Loan Purpose	LMS Lead Detail
Intended Property Use	LMS Lead Detail
Loan Amount	LMS Lead Detail
Property Type	LMS Lead Detail
Property State	LMS Lead Detail
Purchase Price	LMS Lead Detail
Borrower Email	LMS Lead Detail
Application Date (from LOS OK)	LMS Lead Detail
Lock Date (from LOS OK)	LMS Lead Detail
Close Date (from LOS OK)	LMS Lead Detail

2. Create the **Loan report** in the LOS and name: "PP\_Demo\_Agents"
  - Date range: ALL loan records created in last 12 months
  - Once run, "Export to Text", save as a CSV and keep file in Download folder (or elsewhere)
  - Fields:

Field	Source
Loan Number	LOS Loan File
LMS Lead ID	LOS Loan File
File Started/ Application Date	LOS Loan File
Lock Date	LOS Loan File
Close Date	LOS Loan File
Loan Officer Name	LOS Loan File
Loan Officer Email	LOS Loan File
Borrower Email	LOS Loan File

3. Create the **Agent report** in the HR system/ LMS and name: "PP\_Demo\_Agents"
  - Date range: Active agents in last 12 months
  - Once run, "Export to Text", save as a CSV and keep file in Download folder (or elsewhere)
  - Fields:

Field	Source
Active	Agent Profile
First Name	Agent Profile
Last Name	Agent Profile
LMS Name	Agent Profile
Agent Email	Agent Profile
LMS Agent ID	Agent Profile
Branch	Agent Profile
Role	Agent Profile

4. Upload data to the folder provided by your ProPair contact. Any questions can be directed to 650-226-5165 or [customer@propair.ai](mailto:customer@propair.ai).