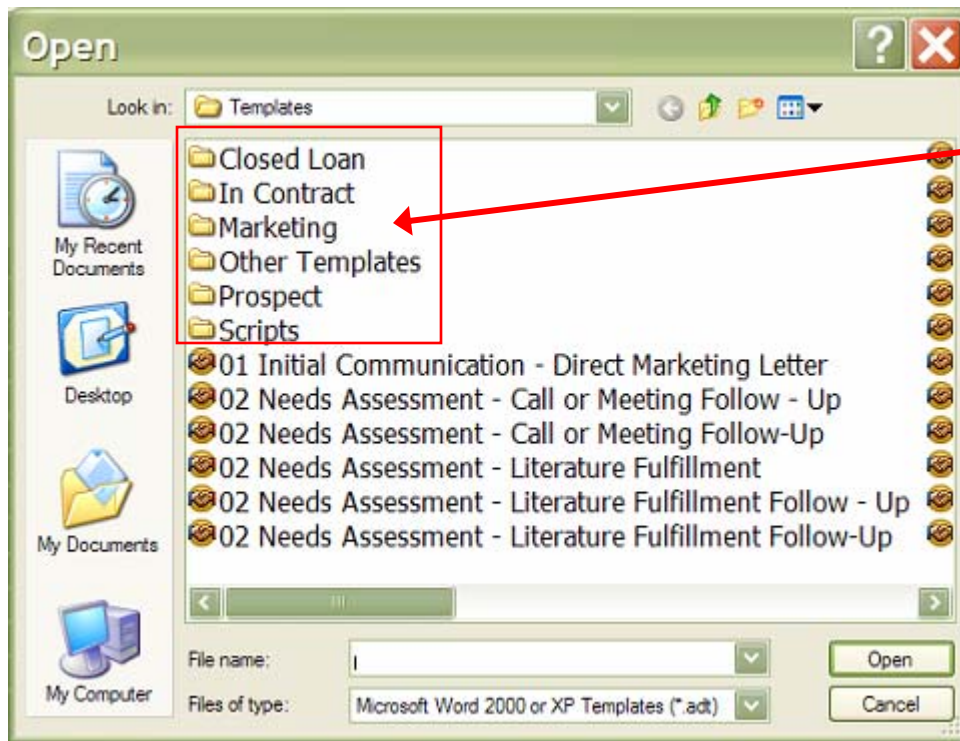


## BEAT 2006 – Features at a Glance – Quick Reference Guide

### Templates

Hundreds of industry specific document and email templates have been customized for ease of use. To access them in ACT, go to:

Write > Other Document (from template)...



Drill down through the folders shown above to access the different types of document templates.

## Activity Series

An activity series is a sequence of activities or events that can be scheduled together with ease. BEAT includes many customized activity series that coincide with common tasks in the mortgage industry. To access them in ACT, go to:

Schedule > Activity Series

An activity series allows you to schedule a pre-defined series of activities with one or more contacts, as well as select an "anchor" date for all activities in the series.

Select activity series and date:

Activity series template:  Series anchor date:

Series description:

NOTE: After the first year schedule quarterly update calls to your Platinum/MVP clients and semi-annual calls to the rest of the database. This in combination with birthday calls; anniversary

Schedule activities

With:

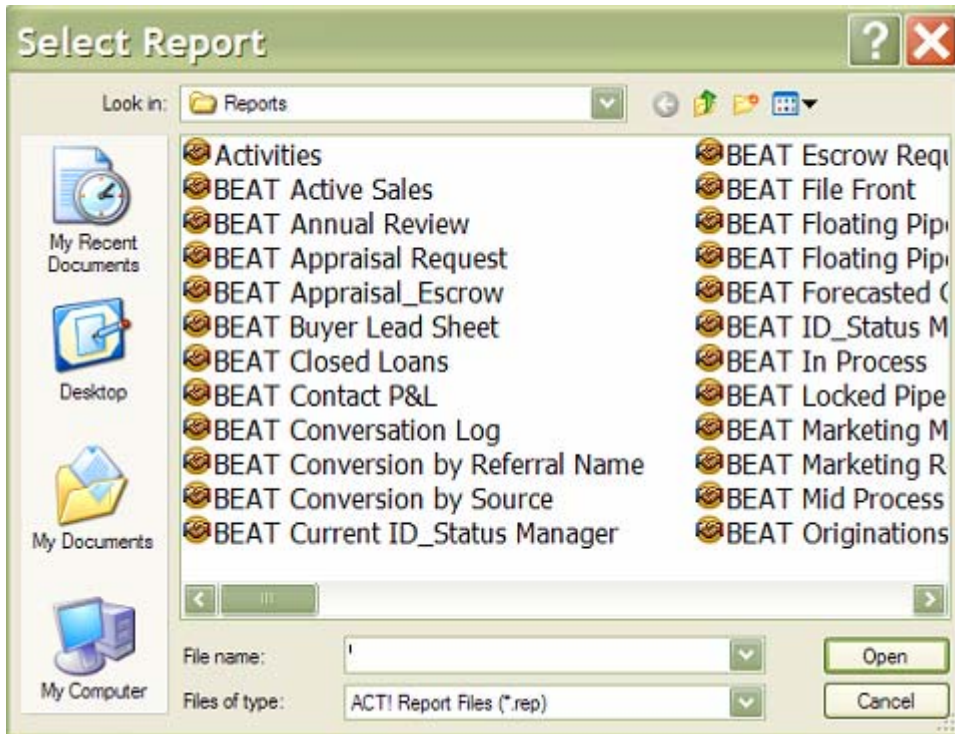
| Type  | From Anchor Date | Duration   | Schedule For | Regarding               |
|-------|------------------|------------|--------------|-------------------------|
| To-do | 0 day            | 15 minutes | Admin        | Day of Closing Letter ( |
| Call  | 3 days           | 15 minutes | Admin        | After Close 3 Day Mov   |
| To-do | 1 week           | 15 minutes | Admin        | After Close 1 Week Le   |
| Call  | 2 weeks          | 15 minutes | Admin        | First Payment Call      |
| To-do | 3 weeks          | 15 minutes | Admin        | After Close 3 Week Le   |
| To-do | 2 months         | 15 minutes | Admin        | After Close 2 Month L   |

You may choose from several templates in the upper portion of the window, and see the details of the activity series in the lower portion.

## Reports

The BEAT software comes with many custom reports that have been specifically designed for the mortgage industry. To access them in ACT, go to:

Reports > Other Contact Reports...



You may select and preview any of the pre-made report templates.

**More Information on BEAT**

We have more ways for you to get the most out of the BEAT product. View our online demonstration at the following link:

<http://cd-consultinggroup.com/media/beat2006-demo/beat2006-demo.html>

We offer a strategic BEAT 2006 Training Guide for sale through our website:

[BEAT 2006 Training Guide](#)

Training videos for the BEAT 2006 product are also available through our website:

[BEAT 2006 Training Videos](#)

Specialized training is also available. Please [e-mail](#) us or call us at 1 (800) 847-1607.