Lending Leads®

Powered by Data Driven Partners, LLC

Client User Guide

Protect. Prospect. Compete. Win.

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Lending Leads is a dynamic prospecting, business development, and competitive intelligence platform designed for commercial and residential lenders, compliance officers, and executive leadership.

Data Driven Partners is committed to ensuring its clients are prepared to navigate **Lending Leads** to capitalize on the competitive intelligence that lies within.

This User Guide gives step-by-step instructions on how to:

Creating Bookmarks

You can choose filters in **Lending Leads** to reach your desired level of segmentation and "*bookmark*" that view for future sessions.

Bookmarks are unique for each **Lending Leads** user, and multiple bookmarks may be created.

When creating a bookmark, consider different scenarios you would like to keep track of. For example:

- ❖ Bookmark the names of people in your portfolio for whom you are responsible for managing the relationship.
- ❖ Bookmark the names of prospects who are on your interest list.
- ❖ Identify and bookmark the elements of your ideal customer profile (size of loan, geography, current banking relationships, property use, etc.).
- ❖ Bookmark the names of banks or other financial institutions who you are concerned about entering your market.

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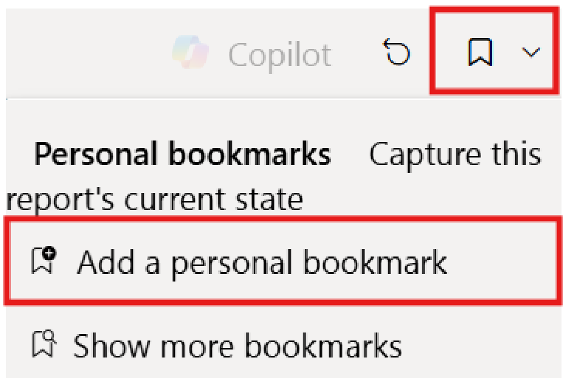
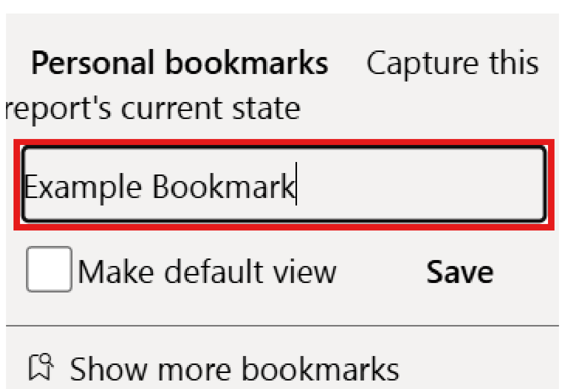
Creating Bookmarks

To create a personal bookmark, follow these steps:

1. Filter the page to your desired level of segmentation.
2. Select the **Bookmarks** icon at the top of the page and then select **Add a personal bookmark**.



3. Name your bookmark. Choose a name to remind you of the purpose of your filter, and Save your bookmark.



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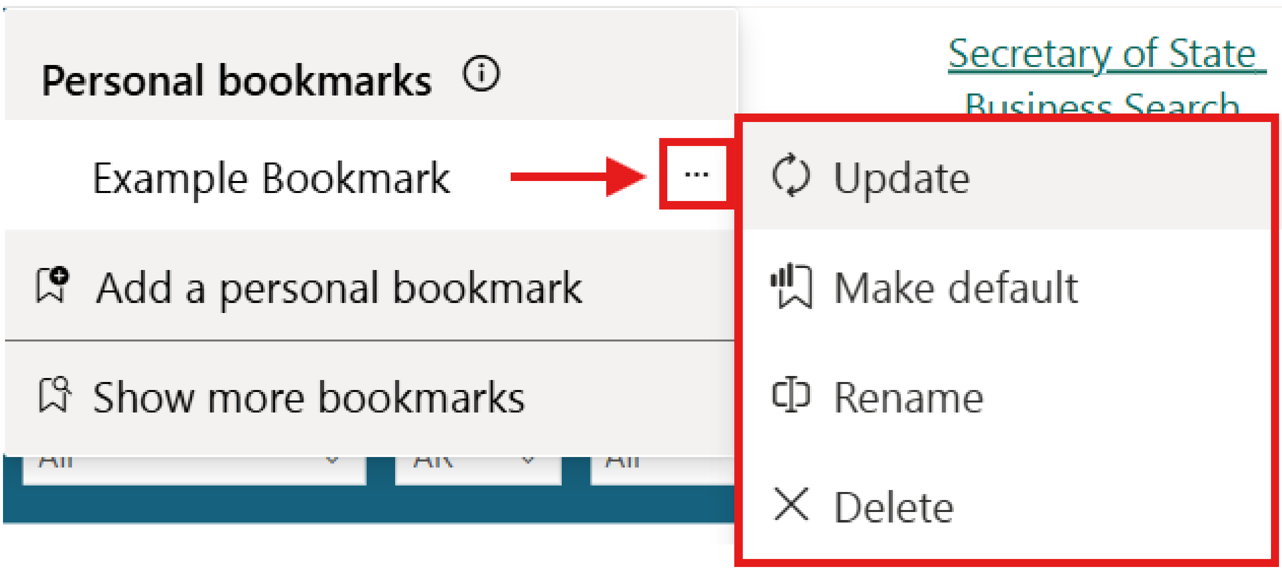
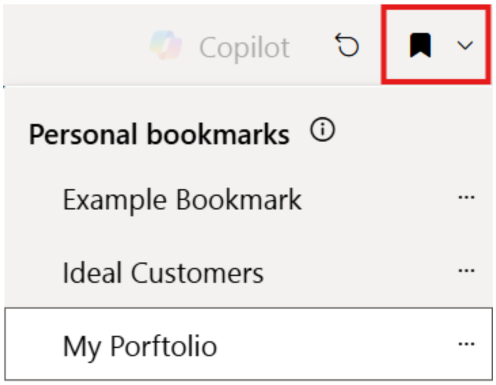
Creating Bookmarks

4. Once your bookmark is saved, you can click the 3 dots to the right of the bookmark name to Update, Rename, or Delete the bookmark.



5. To move from bookmark to bookmark, select the **Bookmarks** icon and choose desired bookmark option.



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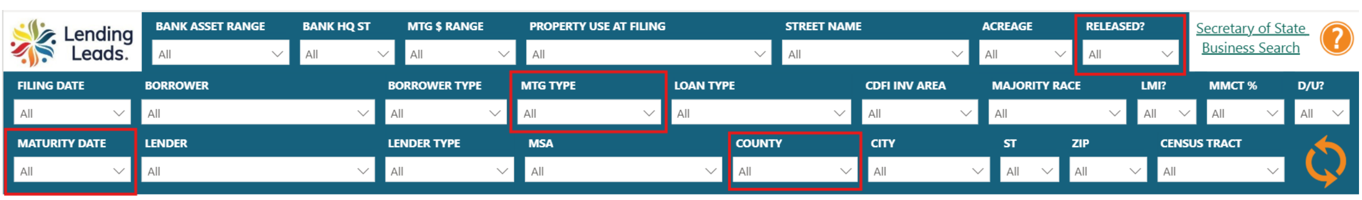
Subscribe to Reports

Subscribing to reports is an easy way to automate report reminders to be delivered at your desired frequency and timeframe.

1. Go to the Export report.

2. Use filters to design report parameters. For example, you may make selections from MTG TYPE, COUNTY, MATURITY DATE, and RELEASED? Filters:



3. Click on the **Subscribe** icon above the filter bar.

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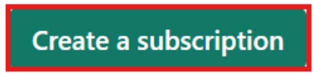
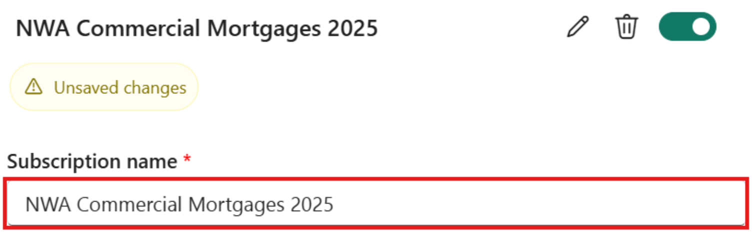
Subscribe to Reports

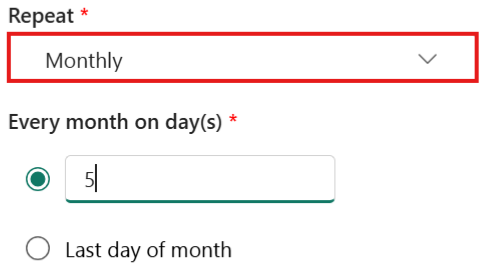
4. Click on **“Create a Subscription.”**



5. Assign a Subscription name. The subscription name will appear in the body of the email sent to you.



6. Select a frequency for the report to be sent (Weekly, Monthly). DDP updates data weekly, so we recommend Monthly subscriptions.



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Subscribe to Reports

7. Schedule time of day you would like to receive the email.

8. You will receive an email at the time defined in your subscription.

9. Click on the "Open report in Power BI >" button in your email to take you to that report in **Lending Leads**.

10. To export the report, select the three dots to the right of the orange "Export here" button.

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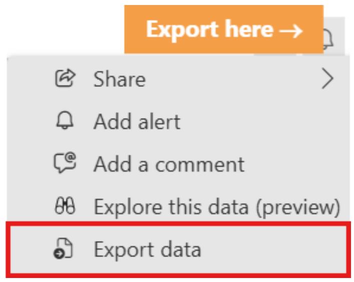
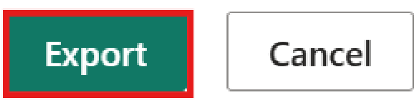
Subscribe to Reports

11. Select "Export data."



12. Select "Export."



Note: If you forward the subscription email to someone without a **Lending Leads** license, they will be able to see the report snapshot but will *not* be able to access the live report page.

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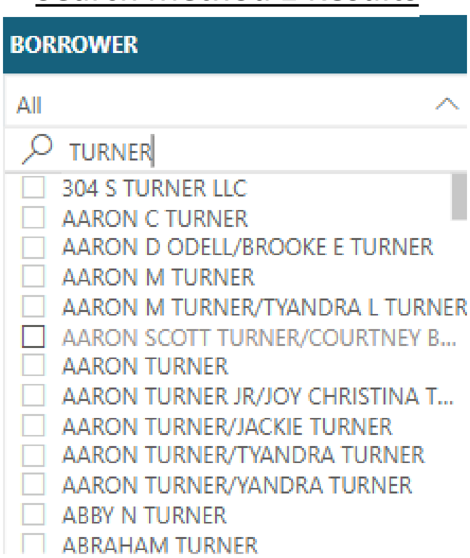
Search Using Keywords

Searching for values using keywords is a great way to find what you're looking for in any filter. Use an asterisk (*) to optimize search results.

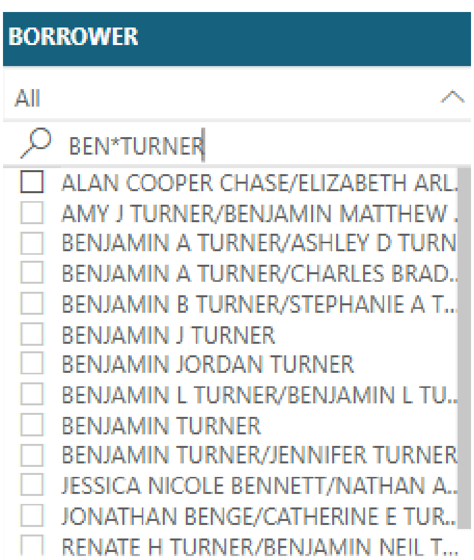
Search Method 1: As an example, if you are searching for a borrower whose last name is TURNER, type TURNER into the BORROWER filter. This will return the names of **all** borrowers whose names include TURNER.

Search Method 2: If you are searching for a borrower named BEN TURNER, it is recommended that you search for that borrower using an asterisk between the names to return the names of all borrowers whose name includes BEN followed by any other letters, followed by TURNER.

Search Method 1 Results



Search Method 2 Results



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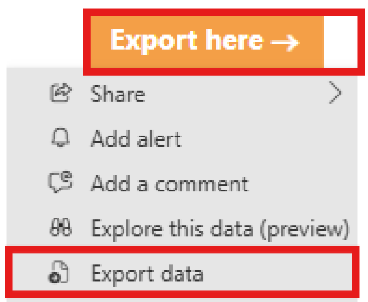
Exporting Mortgage & PPP Data

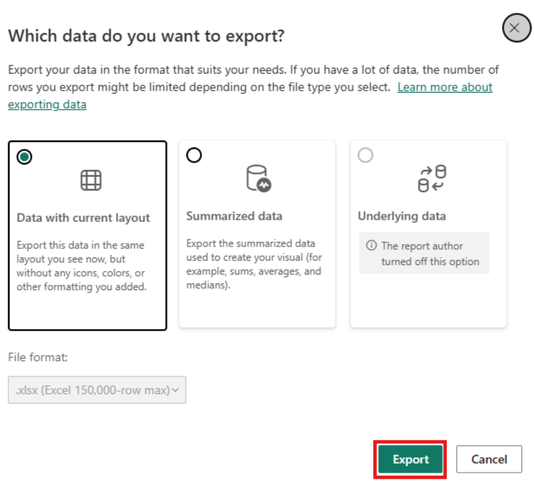
Mortgage data can be exported from **Lending Leads** on the **EXPORT Page**. PPP loan data can be exported on the two pages that begin with Exportable in the PPP LOANS section of **Lending Leads**. *Before exporting, use filters to arrive at desired data segmentation.*

1. In the top right corner of the Export report and the Exportable Directories, select the three dots … to see More Options. On the **EXPORT report** or the **Exportable PPP Loan reports**, hover your mouse to the right of the Export Here button to see the “More Options” button.

2. Select Export data**.**



3. Select Export.



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Exporting Mortgage & PPP Data

4. The export will be downloaded to the default download location and a notice will pop up in your browser window.

5. Select the notice next to the download file name to open the Excel file.

Lending Leads may only be used for prospecting and marketing purposes. Data may *not* be used to create anything resembling a competing product or service, even if built for internal use only. Data may not be shared externally or resold.

Parameters will be in place to monitor downloading activity. DDP reserves the right to suspend use of Exportable Directories or cancel contract if DDP suspects noncompliance/misuse of data.

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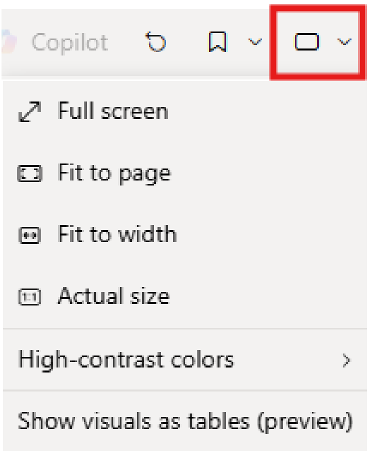
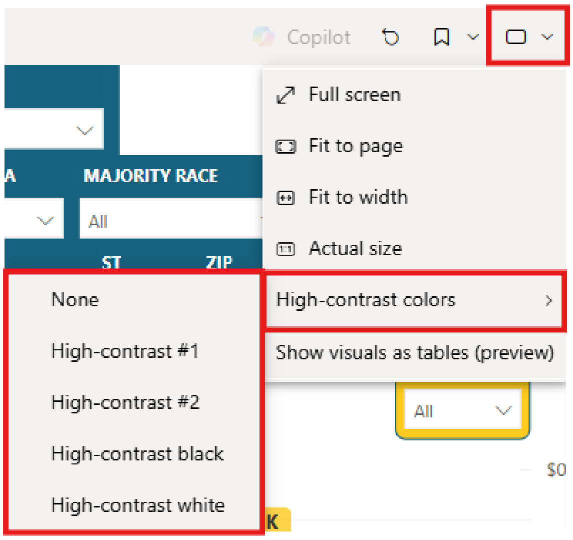
Change Screen View

1. To change your view, select the **View** icon and select an option.



2. You may also view Lending Leads in "High-contrast colors." Click the option to see the available colors.



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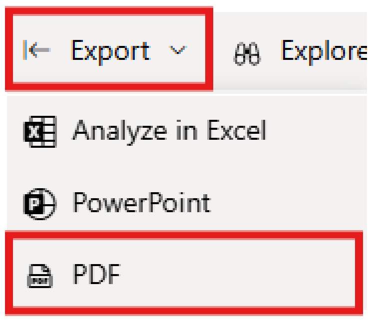
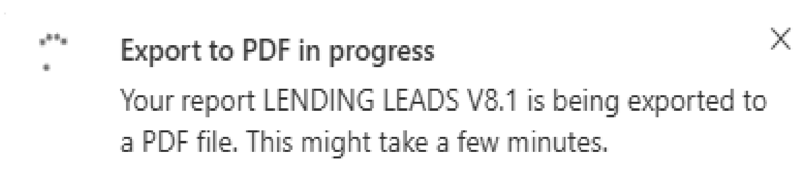
Exporting to PDF

Before exporting, use filters to arrive at desired data segmentation.

1. From the top of any screen select the **Export** icon, and then select PDF.



2. Select Export, and a pop up will appear that says "Export to PDF in progress."



3. When the export is complete, the export will be downloaded to the default download location and a notice will pop up in your browser window.

4. Select the notice next to the file name to open the PDF.

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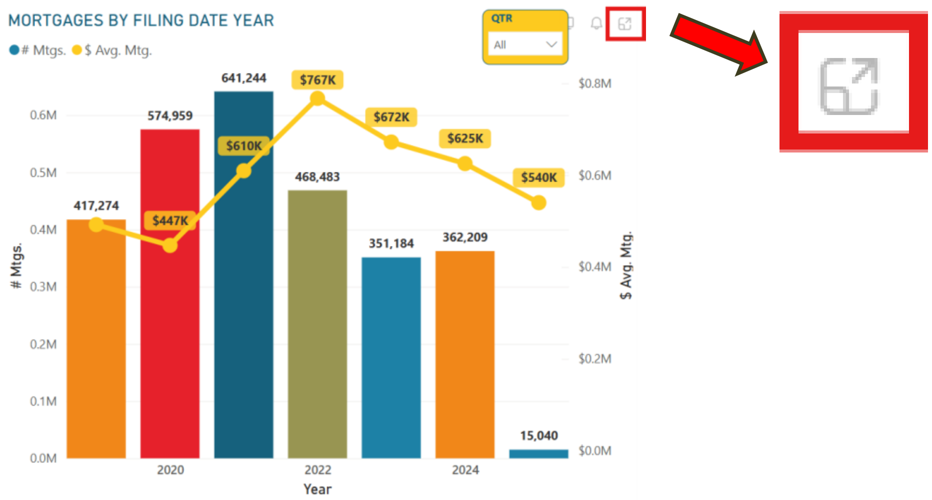
Enlarging Images

To increase the size of the images in Lending Leads (charts, graphs, or tables), follow the steps below:

1. Click on the **Focus mode** icon in the top right corner of the image to open the image in a larger view on a separate page.



2. To exit the page and return to normal view of Lending Leads, select **Back to report**.

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Have Questions? Contact Us!

Click on this icon in **Lending Leads** or contact us directly.

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