

***B.E.A.T. 2005/2006***  
***Screenshots***

# **Basic Layout**

# Top Screen



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## B.E.A.T. *the Competition*

*Business Efficiency Automation Training*

<b>Record Type</b>	<input type="text" value=""/>	<b>Opt In/Out</b>	<input type="text" value=""/>	<b>ID/Status</b>	<input type="text" value=""/>
Contact	<input type="text" value=""/>	<input type="button" value="..."/>	<b>Current Status</b>	<input type="text" value=""/>	<input type="text" value=""/>
Dear/Salutation	<input type="text" value=""/>			<b>Market Level</b>	<input type="text" value=""/>
Spouse	<input type="text" value=""/>			<b>Referred By / Date</b>	<input type="text" value=""/>
Mailing Address	<input type="text" value=""/>			<b>Refer Name</b>	<input type="text" value=""/>
Suite/Floor/Dept.	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<b>Address</b>	<input type="text" value=""/>
City, State Zip	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<b>City, State Zip</b>	<input type="text" value=""/>
<b>Contact Phone Numbers.....</b>	<b>Comm. Style.....</b>	<input type="text" value=""/>	<input type="text" value=""/>	<b>Marketing Materials Y/N</b>	<b>Affiliate/Coaching Partners Y/N</b>
Home Phone	<input type="text" value=""/>	<input type="button" value="..."/>	<b>Best Phone</b>	<input type="text" value=""/>	<input type="text" value=""/>
Phone	<input type="text" value=""/>	<input type="button" value="..."/>	<b>Work Ext.</b>	<input type="text" value=""/>	<input type="text" value=""/>
Mobile	<input type="text" value=""/>	<input type="button" value="..."/>	<b>Fax Ext.</b>	<input type="text" value=""/>	<input type="text" value=""/>
Fax	<input type="text" value=""/>	<input type="button" value="..."/>	<b>Pager/Voice</b>	<input type="text" value=""/>	<input type="text" value=""/>
E-mail	<input type="text" value=""/>			<b>Newsletter</b>	<input type="text" value=""/>
Web Site	<input type="text" value=""/>			<b>Holiday</b>	<input type="text" value=""/>
<b>The Team</b>	<b>Loan Officer</b>	<b>Processor</b>	<b>Marketing</b>	<b>Next Financial Event Change</b>	<b>Next Financial Change Date</b>
<b>1st Name Only</b>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>	<input type="text" value=""/>

# Communications Tab

Communication Tab		Copyright © CD-Consulting Group	
<b>Best Point of Contact....</b>		<b>Last Results.....</b>	
Decision Maker	<input type="text" value=""/>	Bond	<input type="text" value=""/>
Contact	<input type="text" value=""/>	Key Factor	<input type="text" value=""/>
Method	<input type="text" value=""/>	Capability Level	<input type="text" value=""/>
Place	<input type="text" value=""/>	Motivation Level	<input type="text" value=""/>
Time	<input type="text" value=""/>	Maintenance Level	<input type="text" value=""/>
<b>Co-Borrower Phone Numbers.....</b>		<b>Communication Style....</b>	
Home Phone	<input type="text" value=""/>	Best Phone #	<input type="text" value=""/>
Alt. Work Phone	<input type="text" value=""/>	Work Ext.	<input type="text" value=""/>
Fax	<input type="text" value=""/>	Fax Ext.	<input type="text" value=""/>
Mobile/Cell	<input type="text" value=""/>	Pager/Voice Mail	<input type="text" value=""/>
<b>Email 3rd Party</b>	<input type="text" value=""/>		
WebSite	<input type="text" value=""/>		

# Client Tab

## Client Tab

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### Contact Information B-Day

First/Last Name	<input type="text"/>	<input type="text"/>
Marital Status	<input type="text"/> ▼	Social Sec # <input type="text"/>
Birthday	<input type="text"/> ▼	Wedding <input type="text"/> ▼

### Contact Interests.....

Hobbies	<input type="text"/> ▼
Restaurant	<input type="text"/> ▼
Gift Certificate	<input type="text"/> ▼

### Children Information.....

Child's First Name	<input type="text"/>	Birthday	<input type="text"/> ▼
Child's First Name	<input type="text"/>	Birthday	<input type="text"/> ▼
Child's First Name	<input type="text"/>	Birthday	<input type="text"/> ▼
Child's First Name	<input type="text"/>	Birthday	<input type="text"/> ▼

### Spouse Information B-Day

First/Last Name	<input type="text"/>	<input type="text"/>
Marital Status	<input type="text"/> ▼	Social Sec # <input type="text"/>
Birthday	<input type="text"/> ▼	

### Spouse Interests.....

Hobbies	<input type="text"/> ▼
Restaurant	<input type="text"/> ▼
Gift Certificate	<input type="text"/> ▼

### Comments.....

# Employer Tab

Employer Tab		Copyright © CD-Consulting Group	
<b>Contact Employment/Information.....</b>		<b>Contact Employment/Income.....</b>	
Company	<input type="text"/>	Job Title	<input type="text"/>
Direct Contact	<input type="text"/>	Department	<input type="text"/>
Address	<input type="text"/>	Occupation	<input type="text"/>
Address	<input type="text"/>	# of Job Chgs	<input type="text"/>
City, State Zip	<input type="text"/>	Next Raise	<input type="text"/>
Dear	<input type="text"/>	Next Promotion	<input type="text"/>
<b>Spouse /Co-Borrower Employment Information.....</b>		<b>Spouse /Co-Borrower Employment/Income.....</b>	
Company	<input type="text"/>	Job Title	<input type="text"/>
Direct Contact	<input type="text"/>	Department	<input type="text"/>
Address	<input type="text"/>	Occupation	<input type="text"/>
Address	<input type="text"/>	# of Job Chgs	<input type="text"/>
City, State Zip	<input type="text"/>	Next Raise	<input type="text"/>
Dear	<input type="text"/>	Next Promotion	<input type="text"/>

# PQ Tab

PQ Tab

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## Contact Credit Information.....

C/C Payments	<input type="text"/>	Balance	<input type="text"/>
Install Payments	<input type="text"/>	Balance	<input type="text"/>
EXP / TU /EQ	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gross Income	<input type="text"/>	Other Inc.	<input type="text"/>

## Spouse Credit Information.....

C/C Payments	<input type="text"/>	Balance	<input type="text"/>
Install Payments	<input type="text"/>	Balance	<input type="text"/>
EXP / TU /EQ	<input type="text"/>	<input type="text"/>	<input type="text"/>
Gross Income	<input type="text"/>	Other Inc.	<input type="text"/>

## Housing Payment

PI	<input type="text"/>
OtherPay	<input type="text"/>
Insurance	<input type="text"/>
R.E. Taxes	<input type="text"/>
Mortgage Ins.	<input type="text"/>
HOA	<input type="text"/>
OtherPI	<input type="text"/>
PITI	<input type="text"/>

## Financial Snapshot....

Total Mo. Debt	<input type="text"/>
Total Liability	<input type="text"/>
Total Income	<input type="text"/>
Total Liq. Asset	<input type="text"/>
Total Retire.	<input type="text"/>

## Ratios

<b>Top Ratio %</b>	<input type="text"/>
<b>Bottom Ratio %</b>	<input type="text"/>

# 1<sup>st</sup> Loan Tab

1st Loan Tab		Copyright © CD-Consulting Group					
Mtg Anniversary	<input type="text"/>	Trigger Rate	<input type="text"/>	Lender	<input type="text"/>	Loan Number	<input type="text"/>
1st Loan	<input type="text"/>	1st Note Rate	<input type="text"/>	Occupancy	<input type="text"/>	Document Type	<input type="text"/>
Loan Program	<input type="text"/>	Loan Purpose	<input type="text"/>	1st Term	<input type="text"/>	<input type="checkbox"/> 1st Pre-Payment/Date	<input type="text"/>
Sales Price	<input type="text"/>	Appraise Value	<input type="text"/>	LTV/CLTV	<input type="text"/>	<input type="checkbox"/> PMI / Review Date	<input type="text"/>
<b>ARM Info.....</b>	Low Index + Margin = 1st ARM Rate	ARM Period	ARM Cap %	ARM Index Type	ARM Life Cap	High Index	Change Date
<b>1st Loan</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Fee Income</b>	Borrower Points	Origination	Rebate	Gross Comm.	Lender Points	Total Points	Net Commission
<b>1st Loan</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Loan Notes</b>	<input type="text"/>						

# 2<sup>nd</sup> Loan Tab

2nd Loan Tab		Copyright © CD-Consulting Group							
2nd Loan Amt.	<input type="text"/>	2nd Note Rate	<input type="text"/>	Lender	<input type="text"/>	Loan Number	<input type="text"/>		
2nd Program	<input type="text"/>	2nd Purpose	<input type="text"/>	<input type="text"/>	2nd Term	<input type="text"/>	<input type="checkbox"/> 2nd Pre-Payment/Date	<input type="text"/>	
<b>ARM Info.....</b>	Low Index + Margin = 2nd ARM Rate		ARM Period	ARM Cap %	ARM Index Type	ARM Life Cap	High Index	Change Date	
<b>2nd Loan</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<b>Fee Income</b>	Borrower Points	Origination	Rebate	Gross Comm.	Lender Points	Total Points	Net Commission		
<b>2nd Loan</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

# Status Tab

## In Process Status Tab

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Contract	Ordered	Due	Received	Contract	Ordered	Due	Received
Buyer Agent	<input type="text"/>	<input type="text"/>	<input type="text"/>	Builder	<input type="text"/>	<input type="text"/>	<input type="text"/>
Escrow Company	<input type="text"/>	<input type="text"/>	<input type="text"/>	Title Company	<input type="text"/>	<input type="text"/>	<input type="text"/>
Buyer Attorney	<input type="text"/>	<input type="text"/>	<input type="text"/>	Insurance	<input type="text"/>	<input type="text"/>	<input type="text"/>
Appraiser	<input type="text"/>	<input type="text"/>	<input type="text"/>	HOA Insurance	<input type="text"/>	<input type="text"/>	<input type="text"/>

## In Process Critical Dates

Est. Close	Loan Open	Submitted	Approval	Cancel Date	Reason for Cancellation
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Docs Ordered	Docs Out	Docs Signed	Docs Back	Loan Funded	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Actual Close	Lock Date	Expiration	Lock Ext.	Churn Date	
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

# Contact Information Tab

Contact Information Tab		Copyright © CD-Consulting Group					
<b>Record Creator</b>	Admin	<b>Last Edited by</b>	Admin	<b>Last Attempt</b>		▼	
<b>Record Manager</b>	Admin ▼	<b>Create Date</b>		▼	<b>Last Meeting</b>		▼
<b>Contact Access</b>		<b>Letter Date</b>		▼	<b>Last Reach</b>		▼
<input checked="" type="radio"/> Public		<b>Edit Date</b>		▼	<b>Sync Master ID</b>		
<input type="radio"/> Private		<b>Full Name</b>					
<input type="radio"/> Limited Access							
<b>The Team</b>							
<b>Loan Officer</b>							
<b>Loan Processor</b>							
<b>Marketing Asst.</b>							

# Home Address Tab

Home Address Tab		Copyright © CD-Consulting Group	
Home Address	<input type="text"/>	Personal E-mail	<input type="text"/>
	<input type="text"/>		
Home City, St Zip	<input type="text"/> <input type="text"/>		
Home Country	<input type="text"/>		

# User Fields Tab

User Fields Tab		Copyright © CD-Consulting Group			
User 1	<input type="text"/>	User 6	<input type="text"/>	<b>ACT System Fields Not Utilized</b>	
User 2	<input type="text"/>	User 7	<input type="text"/>	Country	<input type="text"/>
User 3	<input type="text"/>	User 8	<input type="text"/>	Messenger ID	<input type="text"/>
User 4	<input type="text"/>	User 9	<input type="text"/>	Hm Ext.	<input type="text"/>
User 5	<input type="text"/>	User 10	<input type="text"/>	Pager Ext.	<input type="text"/>

# **Intermediate Layout (Additional Screens)**

# Priorities Tab

## Priorities/Goals Tab

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### Real Estate Questions.....

Are you purchasing your first home

If no, are you selling your current home?

If selling your home, is it currently listed?

**Are you interested in buying real estate for investment purposes?**

**How old would you like to be when you payoff this loan?**

**What is important to you about a home loan?**

<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

### Investment Questions.....

Do you have a Living Trust?

Would you like to pay your home off early?

Do you have a retirement plan at work?

### Retirement Goals.....

In how many years do you plan to retire?

**1-5 Years**       **5-10 Years**       **10-20 Years**

<input type="text"/>	<input type="text"/>	<input type="text"/>
----------------------	----------------------	----------------------

**Financial goals.....In your opinion what is.....**

**Greatest financial challenge?**

**You're strongest Asset?**

**Are you anticipating any extraordinary changes in the next five years?**

**Rate Priority**

# Mortgage Coach Tab

Mortgage Coach - Discovery Questions Tab

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In your opinion, what is your ultimate goal with this loan?

How long do you expect to be in this home and/or keep this mortgage?

Have you spoken with other lenders, if so who were they?

If so, what programs did you like and why?

## Comments

**Please rank in the following priorities in order of personal importance 1-6 ,  
One being the most important to you.....**

Speed of the Loan Process

Lowest Rate

Requested Documentation

Lowest Overall Cost

Early Mortgage Payoff

Lowest Up-Front Cost

# Mid Process Survey Tab

Mid Process SurveyTab

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**I was calling to make sure you are completely satisfied with the manner in which your transaction has been managed so far. Do you have a few minutes to answer a few very brief questions? I am always looking for way to improve my service to you and would appreciate your candid feedback. Please rate the following on a scale of 1-5. One being poor-five being best.**

Have we done a good job determining your mortgage needs?

Have we returned your calls promptly

Have we answered your questions to your satisfaction?

Have you found everyone on our team to be courteous and professional?

Are you willing to refer us to your family and friends?

What areas do you feel we need to improve upon?

**What can we do better so you can feel confident referring your family and friends to us??**



# Additional Property(s) Tab

Additional Property(s) Tab				Copyright © CD-Consulting Group			
<b>Address 1</b>				<b>Address 2</b>			
Close Date	<input type="text"/>	Sales Price/Value	<input type="text"/>	Close Date	<input type="text"/>	Sales Price/Value	<input type="text"/>
1st Loan	<input type="text"/> %	<input type="text"/> Type	<input type="text"/>	1st Loan	<input type="text"/> %	<input type="text"/> Type	<input type="text"/>
2nd Loan	<input type="text"/> %	<input type="text"/> Type	<input type="text"/>	2nd Loan	<input type="text"/> %	<input type="text"/> Type	<input type="text"/>
Occupancy	<input type="text"/>	Transaction Type	<input type="text"/>	Occupancy	<input type="text"/>	Transaction Type	<input type="text"/>
Add Notes	<input type="text"/>			Add Notes	<input type="text"/>		
<b>Address 3</b>				<b>Address 4</b>			
Close Date	<input type="text"/>	Sales Price/Value	<input type="text"/>	Close Date	<input type="text"/>	Sales Price/Value	<input type="text"/>
1st Loan	<input type="text"/> %	<input type="text"/> Type	<input type="text"/>	1st Loan	<input type="text"/> %	<input type="text"/> Type	<input type="text"/>
2nd Loan	<input type="text"/> %	<input type="text"/> Type	<input type="text"/>	2nd Loan	<input type="text"/> %	<input type="text"/> Type	<input type="text"/>
Occupancy	<input type="text"/>	Transaction Type	<input type="text"/>	Occupancy	<input type="text"/>	Transaction Type	<input type="text"/>
Add Notes	<input type="text"/>			Add Notes	<input type="text"/>		

# Mid Process Tab

Realtor / Builder Tab				Copyright © CD-Consulting Group			
<b>Are you Working with?</b>		<b>Rate</b>	<b>Company</b>	<b>Name</b>	<b>If Referred to Buyer Agent - Complete End Result</b>		
Buyer Realtor <input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<b>Buyer Realtor.....</b>				<b>Builder.....</b>			
Company		<input type="text"/>		Company		<input type="text"/>	
Full Name		<input type="text"/>		Full Name		<input type="text"/>	
Address		<input type="text"/>		Address		<input type="text"/>	
City, State Zip		<input type="text"/>		City, State Zip		<input type="text"/>	
Dear		<input type="text"/>		Dear		<input type="text"/>	
Work Phone		<input type="text"/>	Cell Phone	<input type="text"/>	Work Phone		<input type="text"/>
Direct Dial		<input type="text"/>	Fax Number	<input type="text"/>	Direct Dial		<input type="text"/>
<b>Email 3rd Party</b>		<input type="text"/>		<b>Email 3rd Party</b>		<input type="text"/>	
<b>Are you Working with?</b>		<b>Rate</b>	<b>Company</b>	<b>Name</b>	<b>If Referred to Listing Agent - Complete End Result</b>		
Listing Realtor <input type="checkbox"/>		<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<b>Listing Realtor.....</b>				<b>Seller.....</b>			
Company		<input type="text"/>		Full Name		<input type="text"/>	
Full Name		<input type="text"/>		Full Name		<input type="text"/>	
Address		<input type="text"/>		Address		<input type="text"/>	
City, State Zip		<input type="text"/>		City, State Zip		<input type="text"/>	
Dear		<input type="text"/>		Dear		<input type="text"/>	
Work Phone		<input type="text"/>	Cell Phone	<input type="text"/>	Work Phone		<input type="text"/>
Direct Dial		<input type="text"/>	Fax Number	<input type="text"/>	Direct Dial		<input type="text"/>
<b>Email 3rd Party</b>		<input type="text"/>		<b>Email 3rd Party</b>		<input type="text"/>	
<b>Financial Contingency Date.....</b>		<input type="text"/>		<b>Email 3rd Party</b>		<input type="text"/>	

# **Advanced Layout (Additional Screens)**

# 3<sup>rd</sup> Party Tab

3rd Party Tab		Copyright © CD-Consulting Group					
Are you Working with?	Rate	Company	Name	If Referred to Insurance Agent - Complete End Result			
Insurance Agent	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>			
<b>Appraiser.....</b>		<b>Insurance Agent.....</b>					
Company	<input type="text"/>	Company	<input type="text"/>	<input type="text"/>			
Full Name	<input type="text"/>	Full Name	<input type="text"/>	<input type="text"/>			
Address	<input type="text"/>	Address	<input type="text"/>	<input type="text"/>			
City, State Zip	<input type="text"/>	City, State Zip	<input type="text"/>	<input type="text"/>			
Dear	<input type="text"/>	Dear	<input type="text"/>	<input type="text"/>			
Work Phone	<input type="text"/>	Fax Number	<input type="text"/>	Work Phone	<input type="text"/>	Fax Number	<input type="text"/>
File #	<input type="text"/>	Policy#	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<b>Email 3rd Party</b>	<input type="text"/>	<b>Email 3rd Party</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<b>Escrow / Closing Company.....</b>		<b>Title Company.....</b>					
Company	<input type="text"/>	Company	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Full Name	<input type="text"/>	Full Name	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Address	<input type="text"/>	Address	<input type="text"/>	<input type="text"/>	<input type="text"/>		
City, State Zip	<input type="text"/>	City, State Zip	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Dear	<input type="text"/>	Dear	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Work Phone	<input type="text"/>	Fax Number	<input type="text"/>	Work Phone	<input type="text"/>	Fax Number	<input type="text"/>
Escrow #	<input type="text"/>	Order #	<input type="text"/>	<input type="text"/>	<input type="text"/>		
<b>Email 3rd Party</b>	<input type="text"/>	<b>Email 3rd Party</b>	<input type="text"/>	<input type="text"/>	<input type="text"/>		

# Attorney Tab

Attorney Tab		Copyright © CD-Consulting Group			
Are you Working with?	Rate	Company	Name	If Referred to Insurance Agent - Complete End Result	
Buyer Attorney <input type="checkbox"/>					
Seller Attorney <input type="checkbox"/>					
<b>Buyer Attorney.....</b>			<b>Seller Attorney....</b>		
Company			Company		
Full Name			Full Name		
Address			Address		
City, State Zip			City, State Zip		
Dear			Dear		
Work Phone	( ) - -	Fax Number	( ) - -	Work Phone	( ) - - Fax Number ( ) - -
File #			Policy#		
<b>Email 3rd Party</b>			<b>Email 3rd Party</b>		

# Key Professionals Tab

Key Professionals Tab		Copyright © CD-Consulting Group			
Are you Working with?	Rate	Company	Name	If Referred to Affinity Partner - Complete End Result	
CPA <input type="checkbox"/>					▼
CFP <input type="checkbox"/>					▼
Estate Planner <input type="checkbox"/>					▼

CPA/Accounting Firm.....		Financial Planner.....		Estate Planner.....	
Company		Company		Company	
Full Name		Full Name		Full Name	
Address		Address		Address	
City, St Zip		City, St Zip		City, St Zip	
Dear		Dear		Dear	
Work Phone	( ) - -	Cell	( ) - -	Work Phone	( ) - -
					Cell ( ) - -
Direct Dial	( ) - -	Fax	( ) - -	Direct Dial	( ) - -
					Fax ( ) - -
Email 3rd Pty		Email 3rd Pty		Email 3rd Pty	

# Referrals Tab

Referrals Tab		Copyright © CD-Consulting Group			
Total Value of	# of Referrals	Total Volume	Total Commission		
Client Referral(s)	<input type="text"/>	<input type="text"/>	<input type="text"/>		
Referred to (Name).....	Referral Date	Referral Value	Gross Comm.	End Results	
Referral Name 1	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Referral Name 2	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Referral Name 3	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Referral Name 4	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Referral Name 5	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Referral Name 6	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Referral Name 7	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Referral Name 8	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Referral Name 9	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
Referral Name 10	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	

# Income/Expense Tab

Income/Expense Tab

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Current Transaction Income.....

Gross Income	<input type="text"/>
Referral Fee	<input type="text"/>
Net Income	<input type="text"/>

Labor Cost - # Hours x Wage per hour

Loan Officer	<input type="text"/>	X Wage	<input type="text"/>
Processor	<input type="text"/>	X Wage	<input type="text"/>
Assistant	<input type="text"/>	X Wage	<input type="text"/>

Current Transaction Expenses.....

BrickMortar	<input type="text"/>
Advertising	<input type="text"/>
FoodEnt	<input type="text"/>
Supplies/Post	<input type="text"/>
Referral Gift	<input type="text"/>
Closing Gift	<input type="text"/>
Extended Locks	<input type="text"/>
LO Wage	<input type="text"/>
Proc. Salary	<input type="text"/>
Asst. Salary	<input type="text"/>
Other 1	<input type="text"/>
Other 2	<input type="text"/>
<hr/>	
<input type="text"/>	

Value of Client.....

Transaction(s)

# of Units


Volume

Asset Value

<hr/>
<hr/>
<input type="text"/>

# **Company Layout (Modified Screens)**

# Top Screen

		<h2>B.E.A.T. <i>the Competition</i></h2> <p><i>Business Efficiency Automation Training</i></p>			
<b>Record Type</b>	<input type="text"/>	<b>OPT In/Out</b>	<input type="text"/>	ID/Status	Escrow;Key Professional
Web Site	<input type="text"/>	<input type="text"/>	<input type="text"/>	Current Status	<input type="text"/>
Contact	<input type="text"/>	<input type="text"/>	<input type="text"/>	Market Level	<input type="text"/>
Title	<input type="text"/>	<input type="text"/>	<input type="text"/>	Referred By / Date	<input type="text"/> Date <input type="text"/>
Mailing Address	<input type="text"/>			Refer Name	<input type="text"/>
Suite/Floor/Dept.	<input type="text"/>	<input type="text"/>	<input type="text"/>	Salutation	<input type="text"/>
City, State Zip	<input type="text"/>	<input type="text"/>	<input type="text"/>	Last Results	<input type="text"/>
<b>Phone Numbers:</b>			<b>Best Point of Contact</b>		
Direct Dial	<input type="text"/>	<input type="text"/>	Best Phone #	<input type="text"/>	Best Contact
Work Phone	<input type="text"/>	<input type="text"/>	Work Ext	<input type="text"/>	Place
Fax Number	<input type="text"/>	<input type="text"/>	Home Phone	<input type="text"/>	E-mail
Cell/Mobile Phone	<input type="text"/>	<input type="text"/>	Pager/Voice Mail	<input type="text"/>	Web Site
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# Communication Tab

Communication Tab		Copyright © CD-Consulting Group			
<b>Sales Information.....</b>		<b>Co-Borrower Phone Numbers.....</b>			
Decision Maker	<input type="text"/>	<input type="button" value="v"/>	Home Phone	<input type="text"/>	<input type="button" value="..."/>
Capability Level	<input type="text"/>	<input type="button" value="v"/>	Alt Work Phone	<input type="text"/>	<input type="button" value="..."/>
Motivation Level	<input type="text"/>	<input type="button" value="v"/>	Fax 2	<input type="text"/>	<input type="button" value="..."/>
<b>Provides the Data to Prioritize.....</b>		Cell/Mobile		<input type="button" value="..."/>	<input type="button" value="..."/>
		<b>E Mail 3rd Party</b>			
		Web Site		<input type="text"/>	