

Marketing Assistant User Role

Following is a description of the “Marketing Assistant” user role and their permissions. Contact your iConnect admin to have a Marketing Assistant assigned to your account:

1. Marketing Assistants may:

- a. Change their own password
- b. Manage their own “Tasks”
- c. Impersonate assigned Users

Marketing Assistants, may not:

- a. Create Mortgage Insights presentations
- b. Download lists
- c. Market from their own account
- d. Manage Tasks assigned to person they are impersonating.
- e. Change user Passwords

2. Marketing Assistant will have impersonation privileges

- a. A Loan Officer can view who their marketing assistant is in their profile
- b. Only one Marketing Assistant per Loan Officer
- c. Loan Officers are Unassigned if Marketing Assistant is Terminated, made inactive, or switched to a different User role.

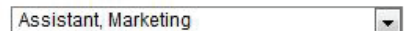
Current State Licenses



A screenshot of a web interface showing a list of US states with checkboxes next to them. The visible states are ALABAMA, ALASKA, ARIZONA, ARKANSAS, CALIFORNIA, and COLORADO. There is a scrollbar on the right side of the list.

Assign Marketing Assistant:

Warning: Assistant will have access to your account.



A screenshot of a dropdown menu with the text "Assistant, Marketing" selected. There is a small downward arrow icon on the right side of the dropdown.

SAVE MARKETING ASSISTANT





3. Assigned Loan Officers appears in “Marketing Assistant User Selection” area. Clicking on a User’s last name takes you to “Impersonation.”

Marketing Assistant User Selection

To begin your marketing activities, search for your user then click on their last name.



A screenshot of a search bar with the text "Search By:" followed by a dropdown menu showing "Last Name". There is a text input field next to the dropdown. To the right of the input field is a blue button labeled "Search Users" and a link labeled "View All Users" with a circular arrow icon.

User Type	Branch Location	Last Name	First Name	Email Address	Status	Phone 1	Phone 2
CompanyManager	Bala	 Manager	Test	 CompanyAdmin@alliedmg.com	Active	566-456-7890	456-789-1203
LoanOfficer	Bala	 Yost	Jennifer	 jenyost75@gmail.com	Active	763-516-4425	763-516-4425

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4. "Marketing Assistant" may discontinue "Impersonation," of that User by clicking on the green bar.

[Impersonation Active - Click Here Return to User Management](#)

My Account

Personal Information

* First Name:	<input type="text" value="Jennifer"/>
* Last Name:	<input type="text" value="Yost"/>
Suffix:	<input type="text"/>

Social Media Information

Facebook Link:	<input type="text" value="https://www.facebook.com/alliedm"/>
Twitter Link:	<input type="text" value="https://twitter.com/GoAlliedMG"/>
LinkedIn Link:	<input type="text" value="https://www.linkedin.com/compan"/>

5. Marketing Assistant, when impersonating a User, may:

- | | |
|---------------------------------|--------------------------|
| a. Initiate Marketing Campaigns | e. Add Contacts/Leads |
| b. Manage Marketing Campaigns | f. Delete Contacts/Leads |
| c. Add Marketing Partners | g. View Loan Detail |
| d. Upload Lists | |