

Supercharge your mortgage business.



# Revo Mortgage Collaboration System

Your *complete* sales and mortgage deal management solution.

## Industry Challenges:

- Are you looking for a complete mortgage deal management solution?
- Are you using archaic or non-mortgage specific software to manage your business?
- Not getting the tools you need from your network or franchise?
- Want your data to remain independent & have total ownership?
- Want deal collaboration amongst your interactive mortgage team?
- Want to close more leads & pre-approvals?

## Hassle Free:

- ✓ **NO** contract required
- ✓ **NO** IT investment
- ✓ **ONE** low monthly fee
- ✓ **FULL** training & support



Supercharge your mortgage business.

**Sign up now for a  
30-Day Risk Free Trial**

Have questions? Contact us at

**1-403-616-1954**

[info@revodoc.com](mailto:info@revodoc.com)  
[www.revodoc.com](http://www.revodoc.com)

## Revo is *the* solution!

**By supercharging your business with Revo you will have the freedom and power to achieve these desired results.**

### Increase Sales

- Help close more leads & pre-approvals
- Enhance your web sales & marketing strategy
- Sync's online applications to Revo

### Independent System

- Maintain your independence & operate like a superbroker
- Grow your business nationally
- Built for independent brokerages & agents
- Network or franchise brokerages & agents welcome

### Easy to Use

- Sign up & start using
- Intuitive & simple to use
- Personalize the system the way you want it

### Worry Free

- Never miss a task or follow up action again
- Easy audit & compliance on every deal
- Vacation coverage a click away

### Reduce Deal Administration

- Set deal underwriting & forget it!
- All deal information in one integrated dashboard
- Save up to 50% of your time per deal
- Your assistant will be more productive & efficient

### Innovative & Secured

- Advance deal underwriting & collaboration
- Advance workflow & status management
- Advance document management & distribution
- Advance communication & CRM



# Main Dashboard



## Main Features & Benefits:

1. All deals summary lists
2. Quick deal documents summary
3. Sensitive deadlines & milestones
4. Milestone deadlines action required
5. Conditions outstanding action required
6. Reminders, alerts & notifications
7. **File emails to deal or conditions**
8. Assign guest access
9. Personalize & customize dashboard settings

## More Powerful Features:

- Establish deal underwriting & requirements
- Tag notes & documents to deal conditions
- Concise document management
- Secured upload & download deal documents
- **Applicant direct document upload to condition(s)**
- Track deal communication & document distribution
- Customizable deal progress & workflow
- CRM customer deal touchpoints
- Personalized email & PDF templates
- Sales pipeline & reporting
- Deal audit & compliance

The screenshot shows the Revo dashboard interface with the following components and callouts:

- 1 Customer:** Summary of leads (27), pre-approvals (13), and approvals (14).
- 2 Approvals:** A table listing active deals with columns for Name, Purpose, Progress, Amount, Docs Included, Appl Date, COF, Cond Met, Closing, Days To, and Milestone.
- 3 Approvals:** A callout highlighting the 'Docs Included' column in the Approvals table.
- 4 Deadlines:** A table showing upcoming deadlines for deals like Schmidt, John (Apr 23, 2014) and Wallace, Judy (Apr 24, 2014).
- 5 Conditions:** A list of conditions for deals, such as 'Schmidt, John' with a 'Next Milestone: Apr 23, 2014 COF'.
- 6 Alerts:** A list of reminders and alerts, including one for Brian Johnstone.
- 7 Pending Emails:** A section showing the count of pending emails (1).
- 8 Guests:** A section for managing guest access, currently showing Allan Smith.
- 9 Settings:** A callout highlighting the 'Settings' menu item in the top navigation bar.

This graphic and its contents is meant for educational purposes only. All names, amounts, dates are representational only.

### Brokerage Benefits

- File audit and compliance
- Sale pipeline projection & reporting
- Supports business growth
- Supports new hire training
- Deal data archive

### Agent Benefits

- More sales activities
- Less administrative tasks
- On demand deal progress
- Sales pipeline management
- Owns the data

### Applicant Benefits

- Frequent contacts
- Valued customer
- Application status updates
- Easy secured document upload

### Assistant Benefits

- Less administrative tasks
- More customer communication
- Sensitive timeline monitor
- Complete deal tracking
- Forecast workload

**Revodoc Inc.**  
 Unit 103E  
 1144 29 Ave. NE  
 Calgary, AB  
 T2E 7P1