



Pilot Group.Net
Solutions for e-Business



Mortgage

Mortgage Software Admin Help

<http://www.pilotgroup.net>

1-866-282-1029

1-888-228-8440 (toll free)

Customers - customer information

Here is the list of all registered site members. Click customer name link to view complete profile and "Delete" to remove the user.

Pipeline

Here you'll see those borrowers who applied for a loan on your site. Application type shows, if the borrower has submitted an online form or sent you a pdf document.

Change application status by choosing the suitable option in a drop-down menu.

Content management

Below is a list of all site texts and pages. Leave a tick in "On/off" checkbox to disable any page.

Click "Edit" to make changes in site pages names or texts.

Success stories

Here is the list of referrals left on your site. Leave a tick in the "Approve" checkbox to publish referral message on the site. Click "Edit" to make changes in the referrals texts.

Contact information

Here you'll see the list of messages that site visitors left on your site. Please note – when you click "Reply" button, new message will be opened in your default mailing program. (Outlook, The Bat etc)

Call back form

This area contains all call back requests submitted by your borrowers and clients. You can preview, remove and reply every request. Please note – when you click "Reply" button, new message will be opened in your default mailing program. (Outlook, The Bat etc)

SEO configuration

Make changes in site title, keywords and description to lift up your site in search results.

Settings

Administrator info

To change password for site administrative panel you should enter your current password first and then enter a new one. Second email account will be used when the first administrator email is inactive.

Language

To add a new site language, please do the following:

1. At the bottom of the page you'll see a line where you can add language name, Encoding and charset.
2. After you add your language, English language file will be copied and all you will need to do is to translate it right at admin area, to your required language.

It is possible to make changes to the language file choosing language and clicking "Edit" button

Site statistic

Here you can find complete statistics for all site pages.

Site template

To add new color theme you should do the following:

1. upload files with the theme to pilot_3_theme, for example css_orange, images_orange
2. Enter new color theme name (e.g. orange)
3. Specify new color theme images and css folder pathes(/css_orange, images_orange)

Don't forget to enter "Save" button

My Notifications

In this area you can add notes about important events and meetings. Up-to-date notes will be showed in admin panel home page. Every note can be removed.