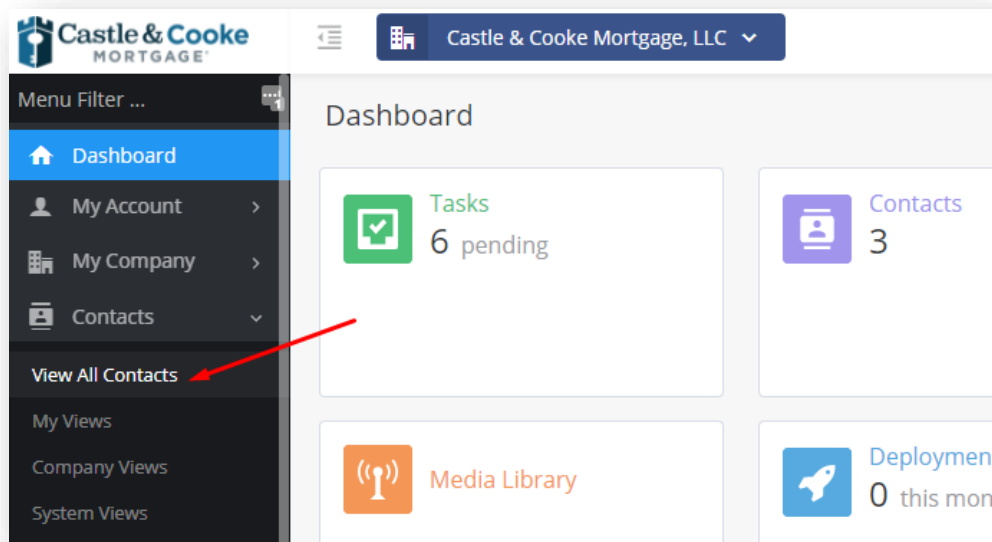


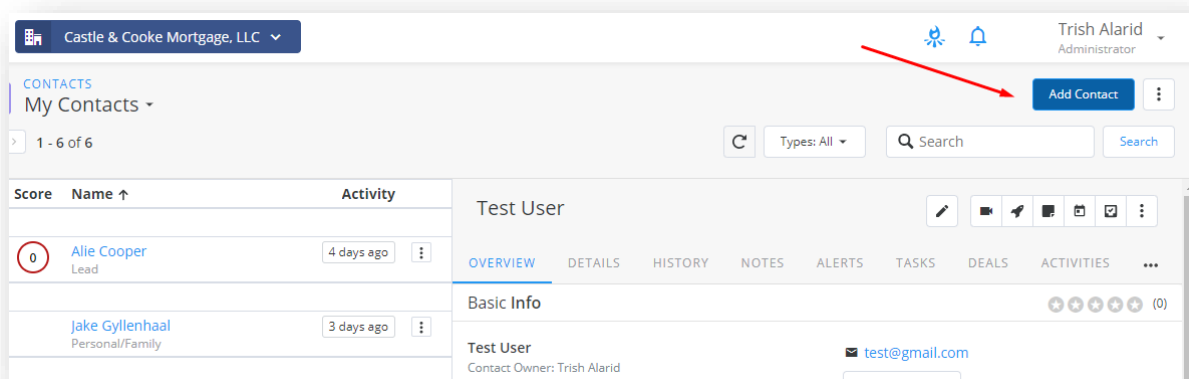
How to in The Forge

Add and Delete a Contact:

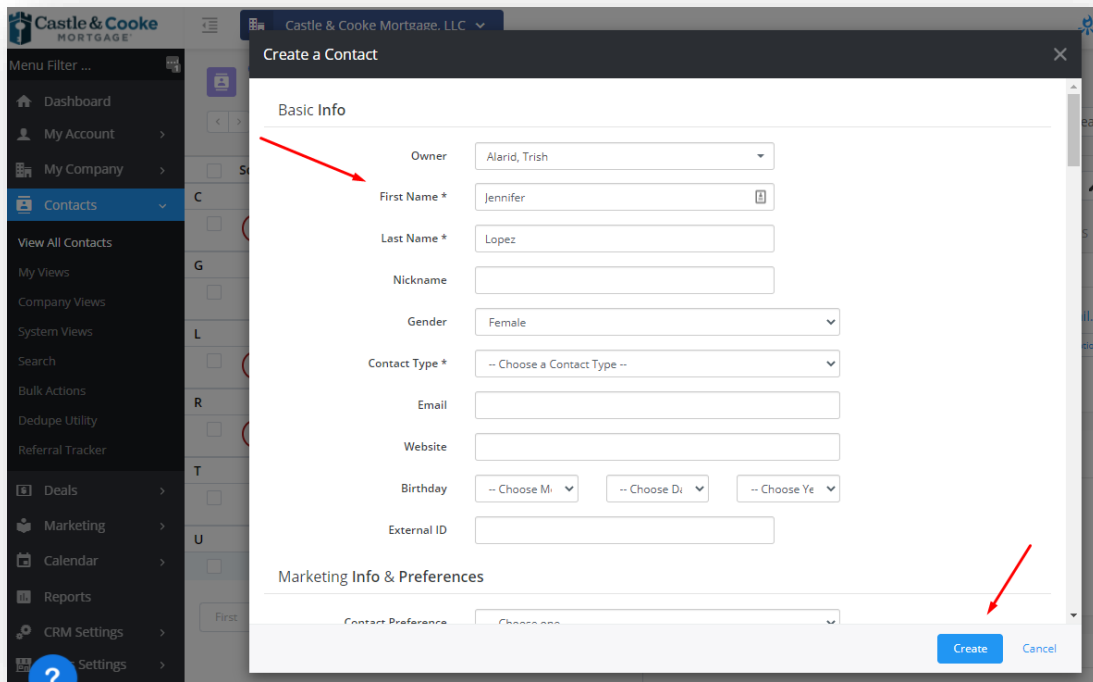
1. Once you sign in, you will land on the Dashboard screen
2. Use the side panel menu > Click on the arrow next to "Contacts" to expand the menu > Then Click on "View All Contacts"



3. This will bring you to the My Contacts page > Then click on the "Add Contact" button on top right side of the page.

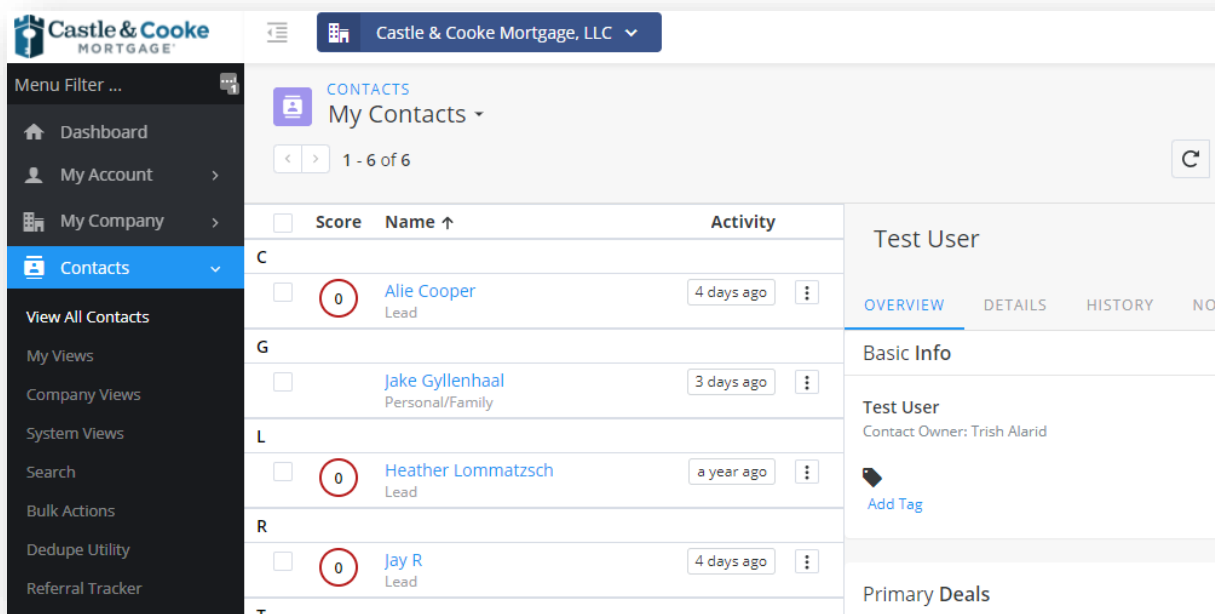


4. A pop up page will appear > Fill out all of the new contact's info > Then click Create at the bottom.

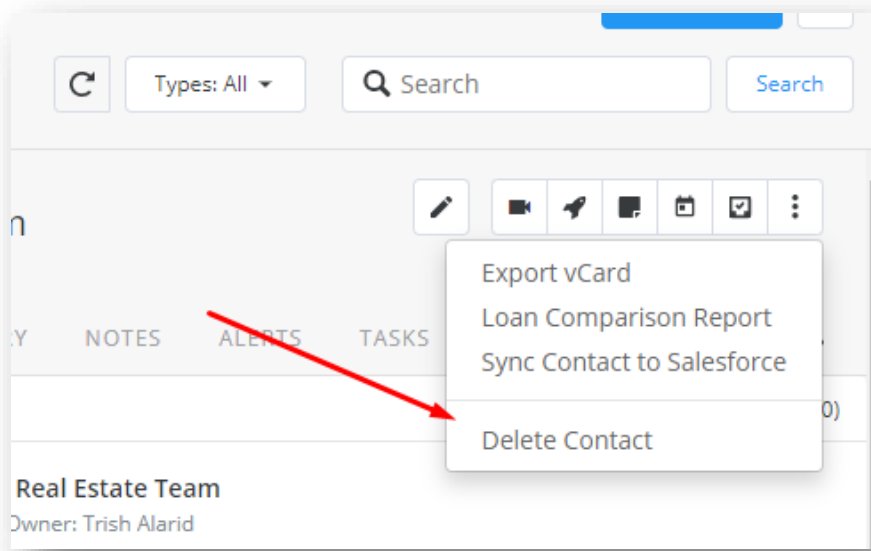


To Delete a contact > Follow steps 1 & 2 above, then ...

- A. From the My Contacts page > Select the contact you would like to delete.

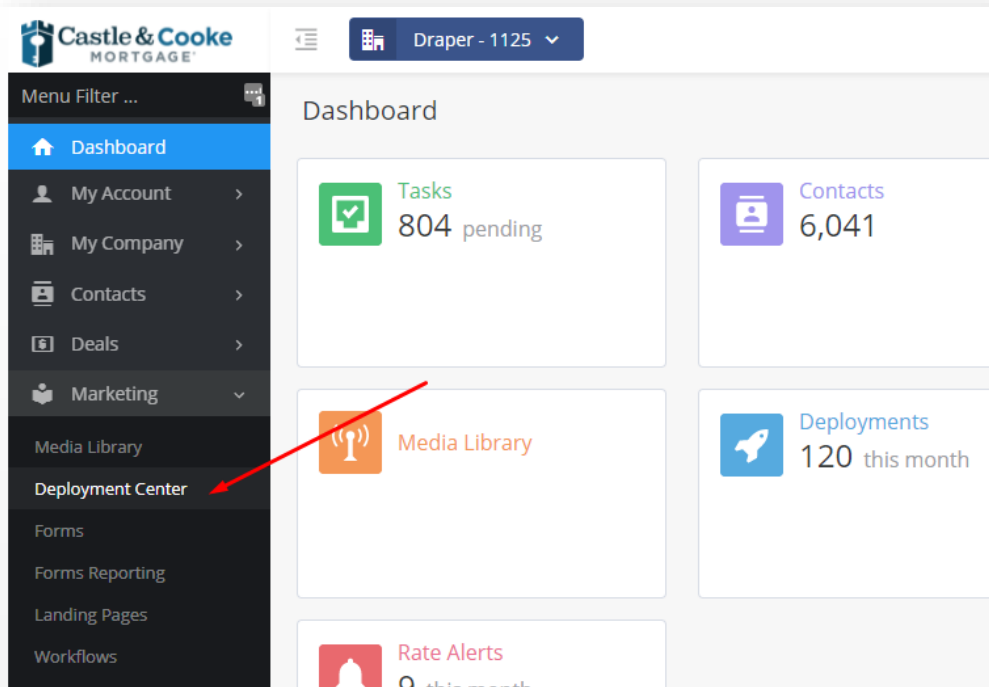


- B. All of the contact's info will display > Click the three vertical dots menu on the right side of the page (kebab Menu) > Click Delete Contact.

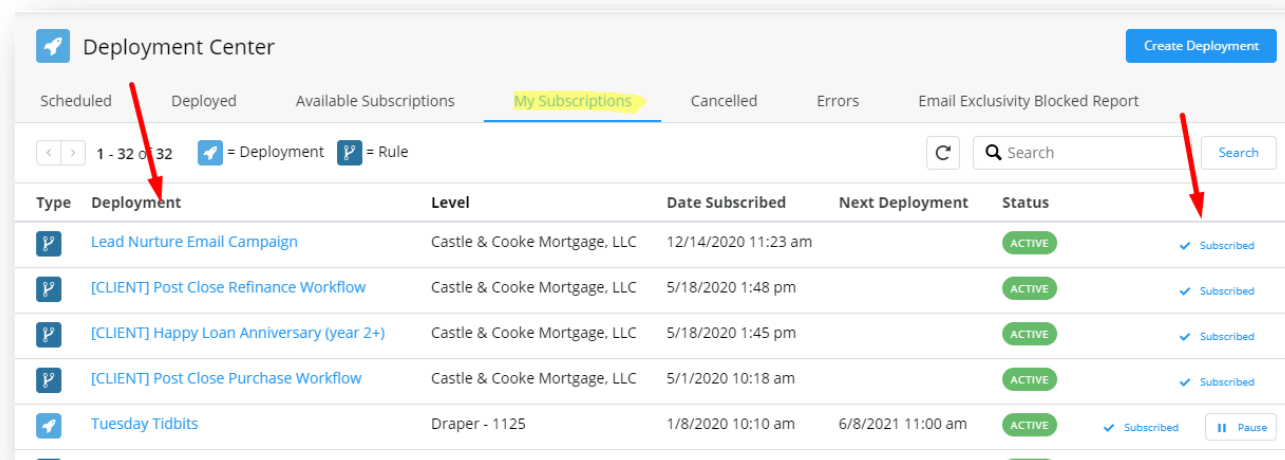


Subscriptions

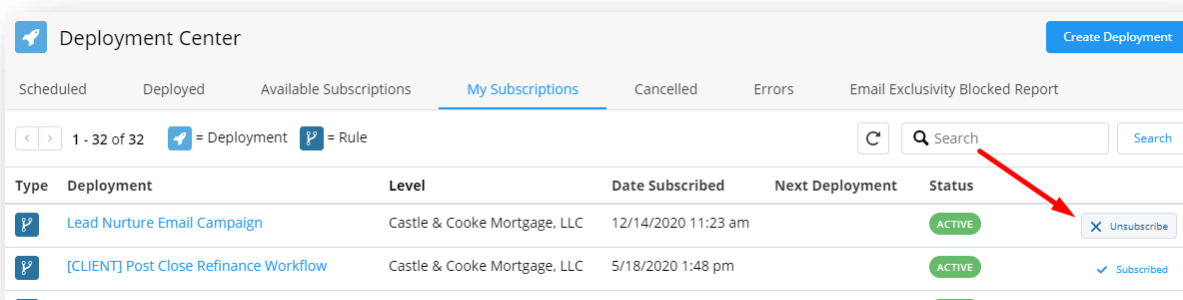
1. Sign into the Forge > you will land on the Dashboard > from the side panel menu > click the arrow next to Marketing to expand the menu > Then click Deployment Center.



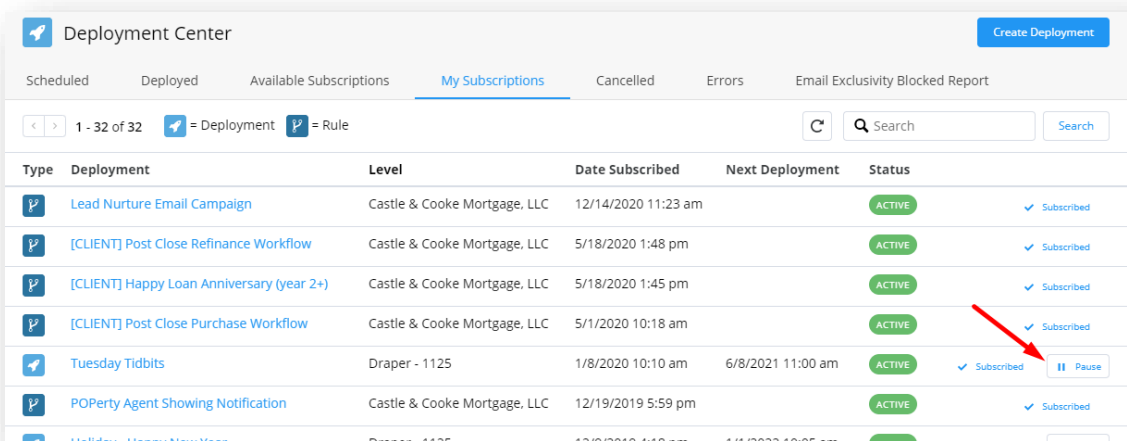
- From the Deployment Center page > Click on Subscriptions at the top. (This will display all automations that you are subscribed to).



- To Unsubscribe from content > Hover over the subscribed verbiage > it will change to an "Unsubscribe Button" Click the button.



- To Pause Content > Click on the Pause button next to the Subscribe button.



- To see what is available that you are not currently subscribed to > From Deployment Center page > Click Available Subscriptions.
- Subscribe to additional content by > Click the Subscribe button on the far right side.

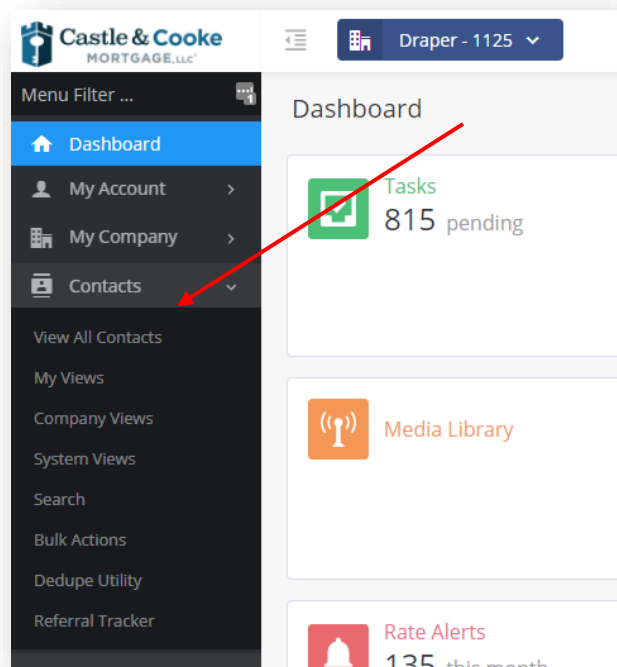
Deployment Center Create Deployment

Scheduled Deployed **Available Subscriptions** My Subscriptions Cancelled Errors Email Exclusivity Blocked Report

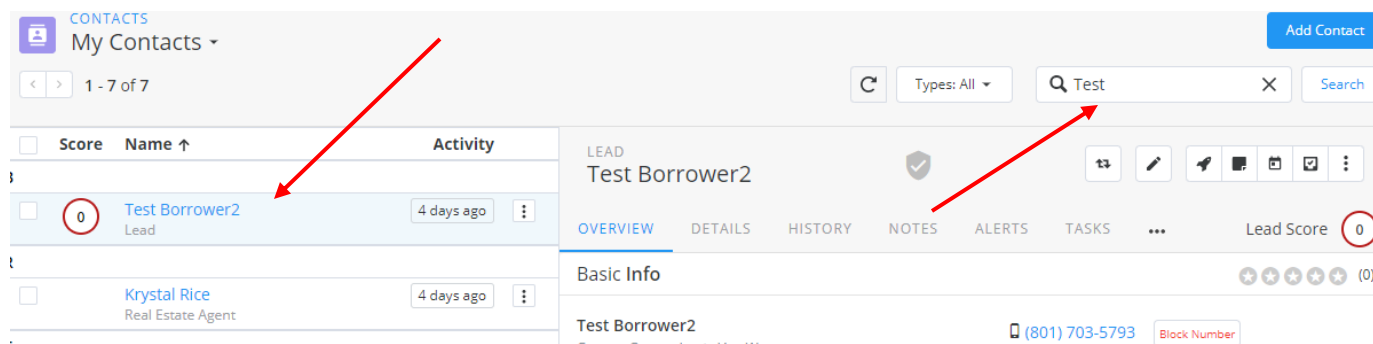
1 - 50 of 57 = Deployment = Rule Search

Type	Name	Level	Created ↓	Next Deployment	Subscribed
	First Payment Reminder Email	Castle & Cooke Mortgage, LLC	1/5/2021 5:05 pm		+ Subscribe
	Monthly Client Newsletter	Draper - 1125	12/23/2020 5:33 pm	7/7/2021 6:00 pm	+ Subscribe
	Retail LO Recruiting	Castle & Cooke Mortgage, LLC	12/8/2020 8:06 am		+ Subscribe

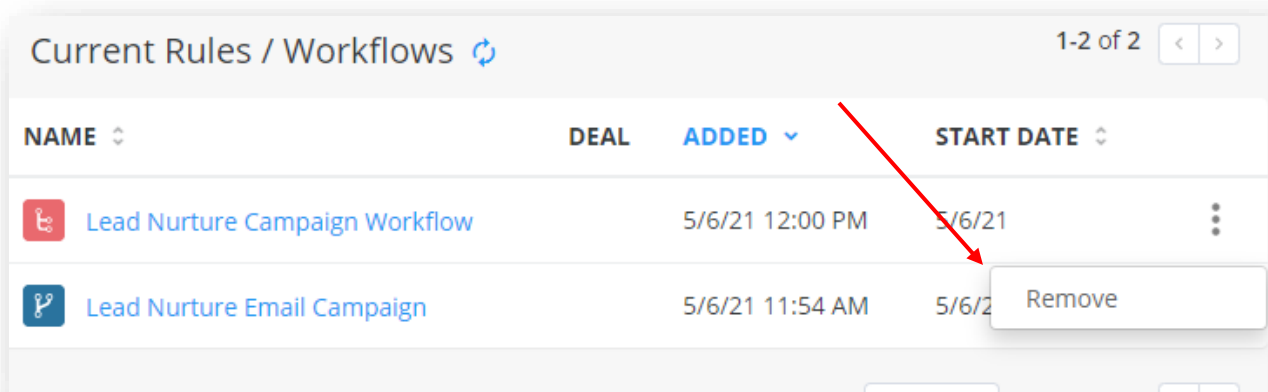
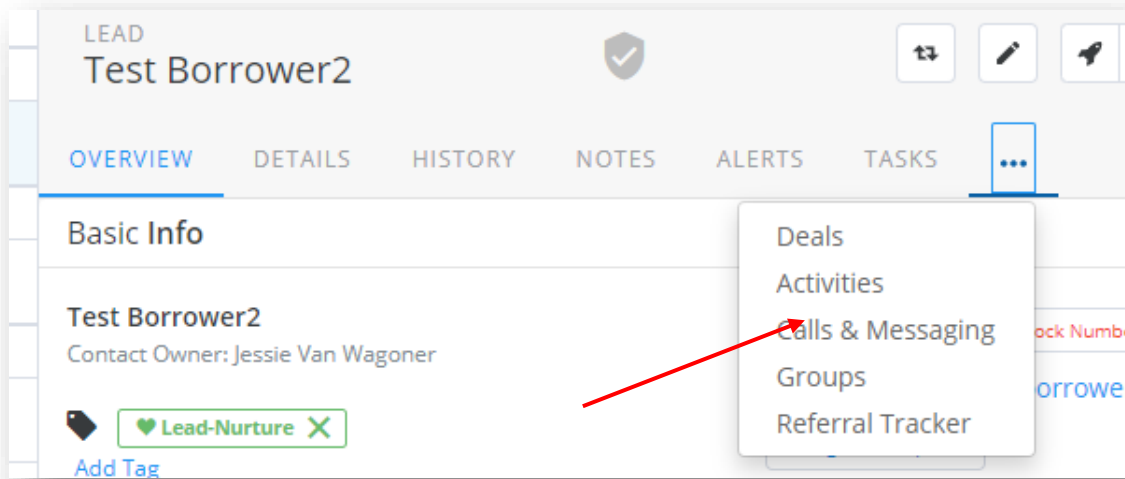
1. **Unsubscribe a contact from a Subscription in The Forge** > From the Dashboard > Click the arrow next to Contacts to expand the menu > Click View All Contacts.



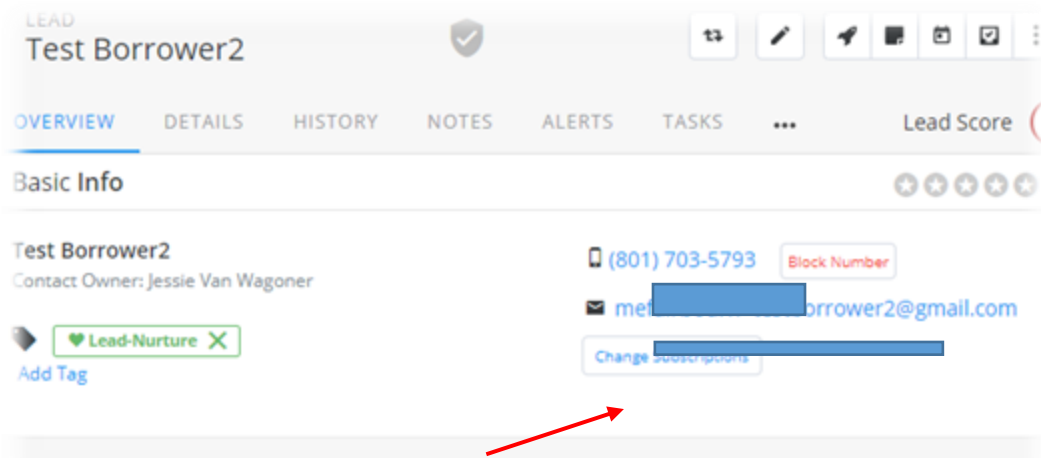
2. Type Contact Name in Search Box and click Search > Click on the Contacts Name.



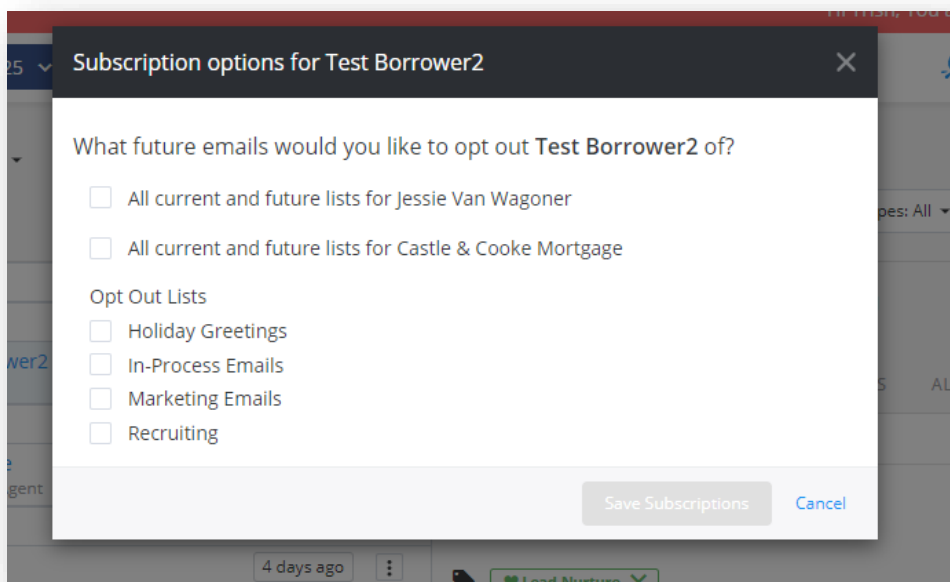
3. Click on the three dot menu on the far right of the menu ribbon > Select Activities > The Subscriptions & Workflows will display > Locate the subscription the contact wishes to be removed from > Click the three dot menu to the right > Click Remove



1. **Opt out a contact from CCM Marketing content.** *(This will allow you to remove the contact from a particular type of content including all marketing from a specific Loan Officer and/or all content from Castle & Cooke)* From the Dashboard > Follow Steps 1 & 2 from above. Select Contact > Click Change Subscriptions Button.

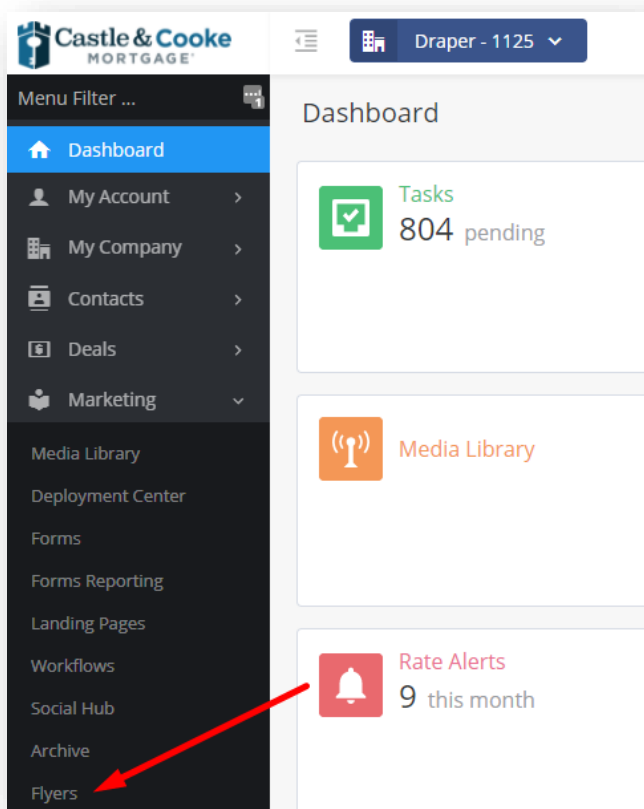


2. Check the boxes for types of content that the contact no longer wishes to receive.

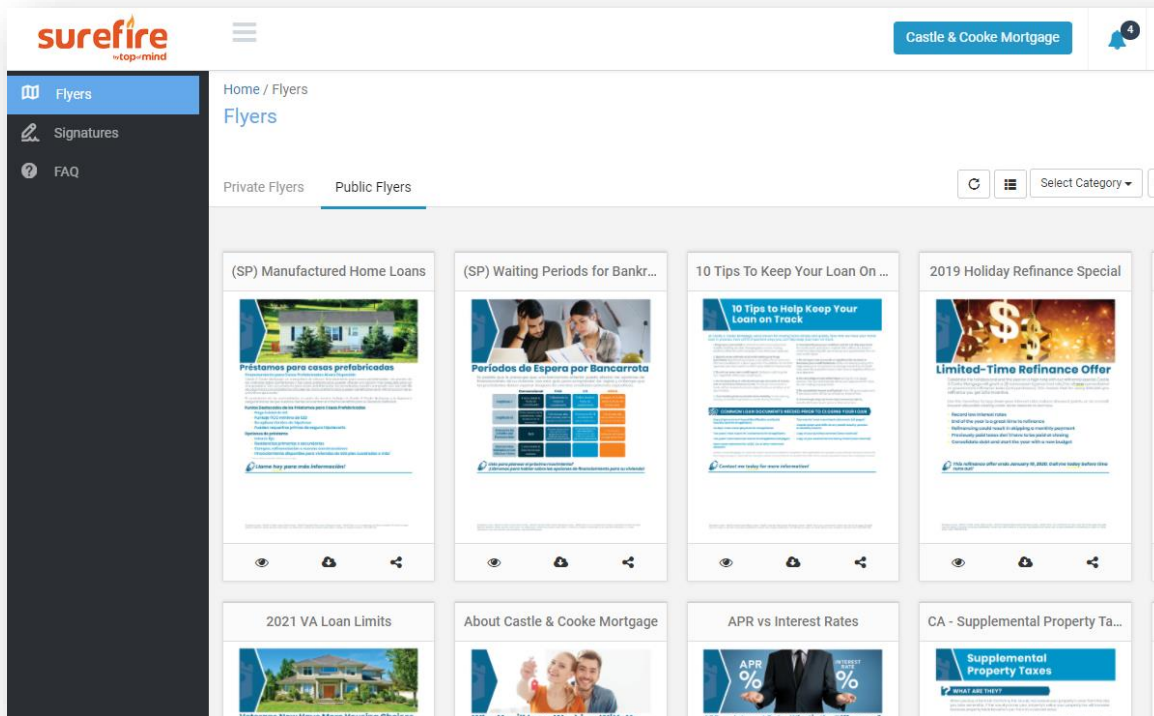


Flyers (Top of Mind)

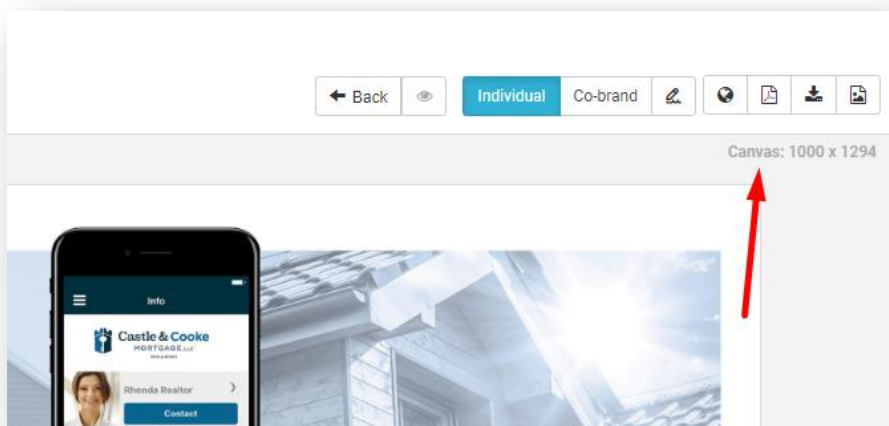
1. Sign into The Forge > from the side menu panel > Click the arrow next to Marketing to expand the menu > Click Flyers.



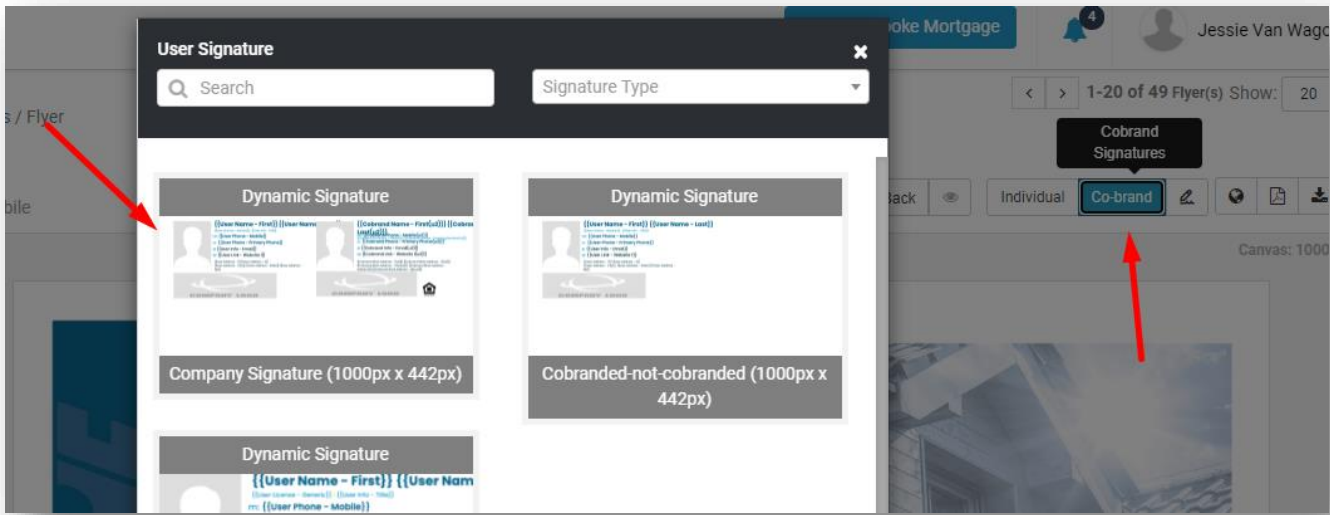
- You will be redirected to Top of Mind > You will see a list of available flyers to select from which can be downloaded as a PDF for print and cobranded with your referral / Real Estate Partners.



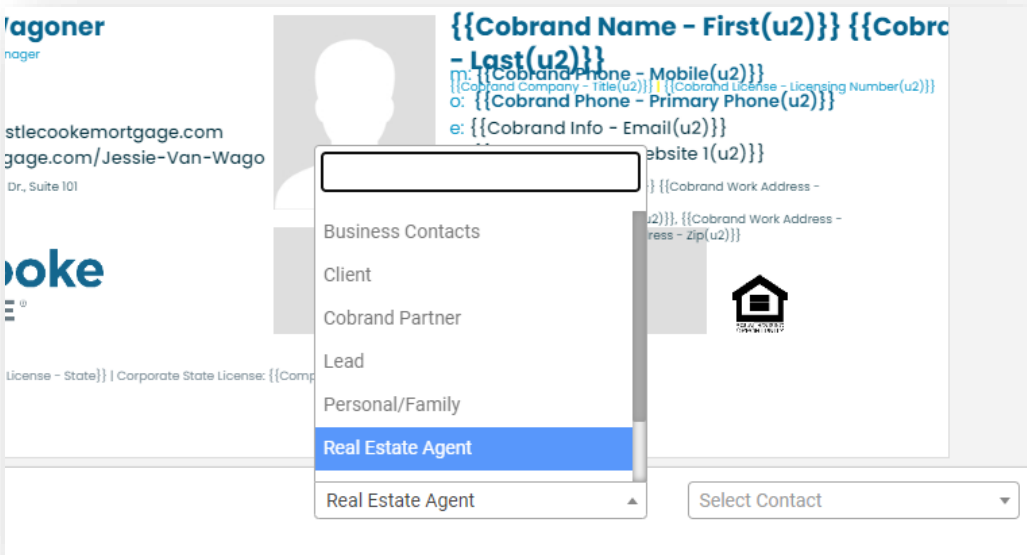
- Click on the Flyer of your choice > Once the flyer populates > There are multiple options on the top right side including PDF, JPEG, and cobranding.



- To Cobrand > Select the Co-Brand button > A pop up will appear > Select Dynamic Signature as shown below > Click Below.



- B. Next > Scroll to the bottom of the page > you will see two drop down menus > First select the contact type (Real Estate Agent) > Then in the second drop down box > Select the name of the contact.



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Real Estate Agent

Cheryl Knowlton