



REQUEST FOR CIC CREDENTIALS

STEP BY STEP GUIDE

1. Go to Contact

The screenshot shows the HubSpot interface. The 'Contacts' menu item in the top navigation bar is highlighted with a red box. Below it, the 'Contacts' section is visible, showing 24,933 records. A search bar is present, and a table of contacts is displayed below.

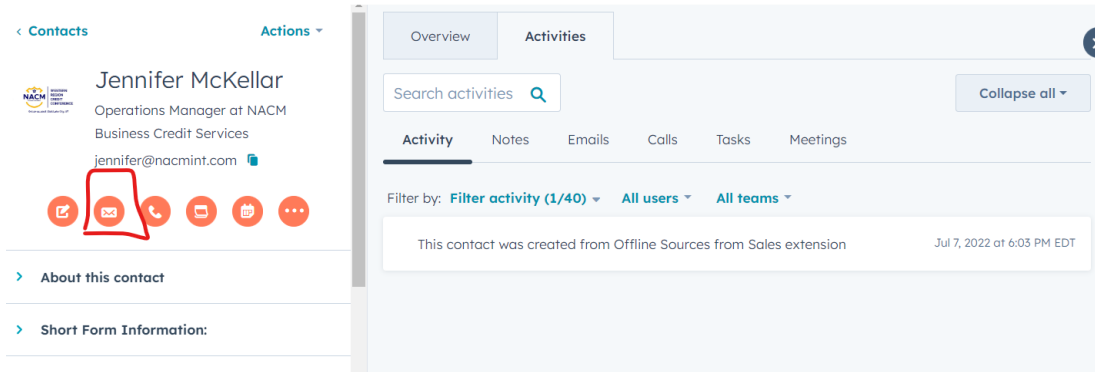
	NAME	EMAIL	PHONE NUMBER	CONTACT OWNER	MARKETING CONTACT STATUS	
<input type="checkbox"/>	Jorge Gall...	gallardorealtyllc@gmail.com	+1 (786) 229-7746	Michael Fernandez (mf...	Marketing contact	R
<input type="checkbox"/>	Mindy Kapit	mindy@kapitalbrothers.com	+1 (954) 650-4441	Michael Fernandez (mf...	Marketing contact	R
<input type="checkbox"/>	Sei Desmangles	seiryn.d@gmail.com	+1 (954) 330-8305	Sara Winner (ops@winn...	Marketing contact	B

2. **SEARCH** for Jennifer McKellar then click her name which will redirect to her profile

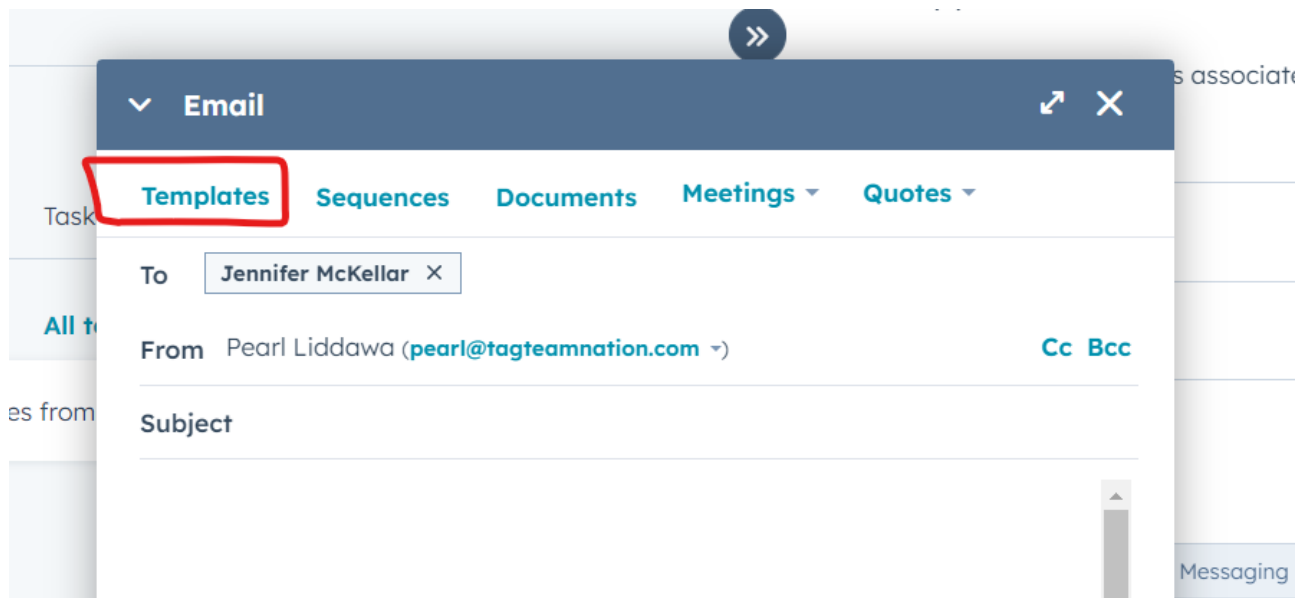
jennifer mc			
<input type="checkbox"/>	NAME	EMAIL	CONTACT CATEGORY
<input type="checkbox"/>	Jennifer McKellar	jennifer@nacmint.com	--



3. After you're redirected to her profile **CLICK** the email icon



4. You will be redirected to create an email. Just **CLICK THE TEMPLATE**





5. **SEARCH** for CIC then **CLICK** CIC Credential

NAME	CREATED BY
CIC Credential	Pearl Liddawa

6. Edit all the necessary details needed then click **SEND**

- First Name
- Last Name
- Phone Number
- Email (**NOTE: Use your company email address)

Email

Templates Sequences Documents Meetings Quotes

To: Jennifer McKellar

From: Pearl Liddawa (pearl@tagteamnation.com)

Subject: Jennifer may I request for my CIC Credentials

Hi there,

This is Pearl a new Loan Officer here at Tag Lending Group. Please see below the information to process my needed credentials for Full credit and soft credit.

First Name: Pearl
Last Name: Liddawa
Phone: +63 935 726 6443
Email: pearl@tagteamnation.com

Send Create a task to follow up