
Mortgage Quest Technical Support

The Best Marketing Software for the Mortgage Industry

Policies and Procedures



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Overview

Business computing is a world of constant change. Technologies, user expectations, market conditions, and demands on business are all subject to rapid changes. Your challenge is to find new and better ways to manage these changes and keep costs down. Ultimately, your success depends on how effectively you can put Mortgage Quest to work to increase sales and create a referral-based business.

At Market Focus we understand the importance of being available when you need us. Sharing information, responding to technical changes, and working through problems and solutions together are part of our responsibility in providing you with a reliable, comprehensive support program.

Ours is not a "one size fits all" approach to support. Instead, we have developed a variety of services that respond to the diverse requirements of our customers. Our tiered support and upgrade plans provide you with the maximum flexibility based on your particular business needs.

Hours of Operation

Mortgage Quest Technical Support is available Monday through Friday, from 8 am to 5 pm, Pacific Standard Time.

Contacting Technical Support

You can contact Technical Support using following methods:

Telephone: 800-708-9715, Ext. 2

Internet: <http://support.emarketfocus.com>

Support Services

Market Focus, Inc. uses the latest Internet technology to provide you with many support services, including:

- Mortgage Quest Knowledge Base – Central repository for articles on helpful tips, answers to “how to” questions, solving problems and other useful information.
- Mortgage Quest Help Desk – Customers can submit support tickets and track their status through individual accounts.
- Mortgage Quest Update Service – Program updates and new features are downloaded automatically from Mortgage Quest.
- Mortgage Quest Online Training – Learn how to use Mortgage Quest’s basic features via the Internet. The training is divided into topic areas. A training CD is available for an additional cost.
- Database Repair – If your database becomes corrupted, Support can repair it with special tools.

Annual Support and Upgrade Plans

When you purchase Mortgage Quest, you are provided with 30 days of free technical support from the time of purchase. At the end of 30 days, you can subscribe to an annual support and upgrade plan, which provides you with all support services described above. Please review the support plans described in this document and select the plan that best meets your needs.

Pay Per Request Support

If you do not subscribe to a support plan, you can pay for only support services that you use. Each support service is priced separately, including program updates. This option is for customers who do not plan to use many support services. However, this is not a cost-effective option as compared to the annual support plans, which includes all services and updates for the year.

If you decide on the Pay Per Request option, you will be enrolled for one year. At the end of the year, you will have the option to subscribe to one of the annual support plans. However, there will be an extra fee to cover the cost of any program updates that were missed during the year.

We encourage all Mortgage Quest users to subscribe to an annual support plan, as this will ultimately save you time and money.

Renewing Your Plan

The support plan you select expires on a specific date. Market Focus will send a notice before the current plan expires. We'll also provide you with information about any changes to the plans or new options offered at that time. You may select a different plan or keep your same plan. If you do not renew a plan, you will be enrolled in the Pay Per Request Plan.

Installation Support

If you need assistance installing Mortgage Quest on a network, consider using Market Focus' Installation Support instead of hiring a consultant. For a flat fee of \$150, Technical Support can assist you in installing Mortgage Quest and import data from other loan processing systems. We are Mortgage Quest experts and can solve problems quicker than consultants. This will save you time and money, and it will ensure that the installation and importing is done correctly the first time.

Working with Consultants

Many Mortgage Quest users have computer consultants help them with their computer systems. Market Focus will work with your consultants to resolve any problem with Mortgage Quest. However, we recommend the following:

1. Whenever you plan to have your consultant onsite to help with Mortgage Quest, first schedule an appointment with Market Focus Technical Support. Then if your consultant needs to contact Technical Support, they will have priority and bypass the support queue.

If you don't make an appointment, your consultant will have to wait for a call back, which can be several hours.

2. If you have problems with Mortgage Quest after it is installed, always contact Technical Support first. Do not have your consultant try to solve problems unless directed by Market Focus Technical Support.

Support and Upgrade Plans

Each Market Focus customer has different support requirements. If you have a single version of Mortgage Quest and are a casual user, you may not need high priority support. However, if you have a Mortgage Quest Multi-User Enterprise system on a network, you may want priority support and additional consulting services to help you achieve your marketing goals.

Keep in mind your resources and skill levels as you choose the level of support that best meet your needs and your business goals.

Mortgage Quest support and upgrade services are divided into two categories: Single and networked systems. Each plan is priced differently.

A major component of annual support plans includes free unlimited program updates. Updates correct problems found in Mortgage Quest, and also include new features and enhancements as well.

Market Focus may create additional modules that provide major features. These modules are not included as free updates and are priced separately, such as a new interface module to a loan processing system, like Encompass or to other software programs like Outlook.

Single Version Plans

Bronze Plan

The Bronze Support Plan bundles various support products and services. It entitles you to 6 tickets per year under one help desk account and unlimited updates. The Bronze Plan is for customers who don't require high priority and do not plan to contact Technical Support often. The response time goal for Bronze plan users is one business day.

Silver Plan

The Silver Support Plan is a better value for customers who require more assistance and higher priority. It entitles you to 12 incidents per year under one help desk account, and unlimited updates. The response time goal is between 2-6 business hours.

Gold Plan

The Gold Support Plan is our highest level of support. It is designed for users who want the highest response priority and soonest help with problems. It delivers all the benefits you need to maximize your productivity with Mortgage Quest. There is no limit to the number of incidents, and you can have up to two help desk accounts. The response time goal for Gold plan users is between 1-2 business hours.

Single Version Plan Summary

Service	Bronze	Silver	Gold
Priority	Low	Medium	High
Response Goal	1 Day	2-6 Hours	1-2 Hours
Tickets	6	12	Unlimited
Knowledge Base	No Charge	No Charge	No Charge
Help Desk	No Charge	No Charge	No Charge
Update Service	No Charge	No Charge	No Charge
Online Training	No Charge	No Charge	No Charge
Database Repair	No Charge	No Charge	No Charge
Cost	\$195	\$295	\$495

Multi-User Network Plan

Multi-user network systems are more complex and require more support than the Mortgage Quest single version. As a result, this support and upgrade plan is priced according to the maximum number of users on the system. The basic network plan is allotted 12 incidents per year and has Silver level priority. In addition, you can upgrade to the Gold plan, which has no limit for incidents.

The following table shows the cost for the Multi-user network plans. It also shows the cost of upgrading the support for Gold priority service. The response time goals are 2-6 business hours for the Silver plan and 1-2 business hours for the Gold plan.

Licensed Users	Silver	Gold
2-10	\$295	\$495
11-19	\$395	\$595
20+	\$495	\$695

Multi-User Network Plan Summary

Service	Silver	Gold
Priority	Medium	High
Response Goal	2-6 Hours	1-2 Hours
Tickets	12	Unlimited
Knowledge Base	No Charge	No Charge
Help Desk	No Charge	No Charge
Update Service	No Charge	No Charge
Online Training	No Charge	No Charge
Database Repair	No Charge	No Charge

Pay Per Request Support Plan

If you choose not to subscribe to a support plan, you will pay for only those services that you request during the year. Each service is priced separately as shown below.

Knowledge Base – You will be given access to all articles in the Knowledge Base. The cost is \$95 per year.

Help Desk – If you need to contact support for assistance with a problem or if you have a question, the cost is \$95 per ticket for customers who have the Mortgage Quest single system. The cost is \$125 per ticket for customers who have Mortgage Quest Network systems.

Your request will be serviced by appointment only and must be paid prior to the time of service with a credit card. Support requests can also be purchased online at www.emarketfocus.com. If the solution to the request is to update the program, the cost of the request will be applied to the purchase of the update.

Program Updates – Includes fixes to problems as well as new enhancements that improve the program. The cost for updates increases over time depending on the number of updates you miss. The minimum is \$95 for the one update and increases \$50 for each additional update missed. If you miss all four updates for one year the cost will be \$245.

Database Repair – If your database becomes damaged, you will need to send it in to Technical Support for repair. The cost of the repair is \$95. If the database cannot be repaired, there is no charge.

Pay Per Request Plan Summary

Service	Cost
Knowledge Base	\$95/Yr
Help Ticket Single	\$95/Request
Help Ticket Network	\$125/Request
Program Updates	\$95 Minimum
Database Repair	\$95

Support Component Descriptions

Mortgage Quest Knowledge Base

The Mortgage Quest Knowledge Base is a state-of-the-art Internet central repository of technical information, including articles on solving common problems, answers to “how-to” questions, technical tips, common questions, suggestions, release notes, and other useful information.

Access to the Knowledge Base is free to customers who subscribe to a support plan. The cost is \$95 per year for customers on the Pay Per Request plan.

Features of the Mortgage Quest Knowledge Base include:

- Standardized look and feel of articles
- Easy navigation with the Explorer tree
- Searchable by keywords and categories
- Search results are sorted by relevance
- Article voting is used to determine which articles are most helpful
- Articles can be printed and emailed

Accessing the Mortgage Quest Knowledge Base

There are three ways to access the Knowledge Base on the Internet. When you are on the Log-on Screen, enter your user name and password. Your user name is your email address and the default password is the word password. If you forgot your login information, please email support@emarketfocus.com.

- Visit <http://support.emarketfocus.com>
- Visit www.emarketfocus.com, click Support, and click Knowledge Base / Help Desk

- Start Mortgage Quest and select Help \ Mortgage Quest on the Web \ Enter Knowledge Base \ Help Desk.

To search the Knowledge Base:

1. Enter a search string in the Search field at the top of the Knowledge Base.
2. Search results will be provided by relevance and number of previous hits.
3. Click Advanced Search to search articles with more specific information, such as searching by category or date range.

To vote on an article:

1. Open the article.
2. Click the Vote button at the top of the article.
3. Choose a number to indicate how helpful the article was. The higher the number, the more helpful the article was to you.
4. If you are voting on a suggestion, the number represents how much you would like to see the new feature implemented.
5. Your vote is tallied along with other user's votes. The most helpful articles are shown in the Most Helpful Articles section of the Knowledge Base.

Changing Your Password

1. Log into the Knowledge Base.
2. Click Profile.
3. Enter a new password and enter it again in the Repeat Password field. The password does not display on the screen for security reasons.

Mortgage Quest Help Desk

The Mortgage Quest Help Desk allows you to submit Tickets to report problems via the Internet. A Ticket equals one incident as defined in the next section. Once a Ticket is submitted, you can view the status of the problem.

Access to the Help Desk is free to customers who subscribe to annual support and update plans. Each Help Desk Ticket counts toward your allotment of incidents for your plan. For example, Bronze plan subscribers are allotted 6 incidents per year.

The cost is \$95 per Ticket for customers on the Pay Per Request plan and who have the Mortgage Quest single system. The cost is \$125 per Ticket for customers who have Mortgage Quest Network systems.

Accessing the Mortgage Quest Help Desk

There are three ways to access the Help Desk on the Internet. When you enter the Help Desk, enter your user name and password.

- Visit <http://support.emarketfocus.com> .
- Visit www.emarketfocus.com click Support and click Knowledge Base / Help Desk
- Start Mortgage Quest and select Help \ Mortgage Quest on the Web \ Enter Knowledge Base \ Help Desk.

Reporting problems

The primary and most efficient way to report problems is by adding a Ticket to the Help Desk via the Internet. Do not submit support requests via e-mail. Enter the Help Desk and add a Ticket to describe your problem.

If you report a problem via Telephone, a Ticket will be created by a support person to document the call. However, since our support staff is frequently on the phone, it's more effective to add Tickets via the Internet rather than waiting for them to do it for you. Your response time will be quicker.

Before adding Tickets, here are some tips:

- Search for articles in the Mortgage Quest Knowledge Base that might help solve your problem or answer your question.
- View past tickets you submitted to see if the problem was fixed previously and then try the solution.
- If you have general questions about a feature, view the Mortgage Quest online training first.
- Verify that you have the latest Mortgage Quest update. If not, update the program. View the release notes to see what problems were fixed in the updates.

Adding Help Desk Tickets

1. Click Add a Ticket.

2. Make sure your e-mail address and phone number are correct. To change your contact information, click Profile and make any changes needed.
3. Enter a Title of the problem.
4. Enter a description of the problem. The more details, the better. In the description, it's often helpful to indicate the version of Mortgage Quest you are using. If you can start Mortgage Quest, select Help / About and note the version.
5. Select a priority.
6. Select a problem category.
7. Select the Mortgage Quest product you are using.
8. Click Send to add the Ticket.

Viewing Ticket Status

1. Click Tickets to view current and past tickets.
2. You can filter the view by Status, Priority, Product and Category. For example, you can view only Open Tickets.
3. To view Ticket notes, click the view icon at the far left of the Ticket. Technical Support will add notes as we analyze the problem.

Ticket Management

1. Technical Support monitors the Help Desk for new Tickets added.
2. Response time depends on the level of your support plan and the severity of the problem.
3. When Support analyzes the problem, it will set the status to Open.
4. Support will add notes to document all activities regarding the problem.
5. When Technical Support updates the Ticket information, you will be notified by email.
6. If Technical Support emails you a procedure to solve the problem, we will assume the problem is solved if we do not hear from you in 2 days. At that time the Ticket status will be set to Closed and you will be notified by email.

Incidents \ Tickets

An incident is a problem or question that is received and resolved by Technical Support. Each incident is serviced as a ticket on the support help desk. You can contact Technical Support as many times as needed to resolve a ticket. However, if a request concerns a new problem, it is considered a new incident and serviced under a new ticket.

After you have reached the number of incidents allowed for your support plan is exceeded, we ask that you renew your plan at the next highest level. We may ask you to renew at the next highest level ahead of your expiration date if the number of tickets exceeds the amount given under the plan. This is done to make the support usage consistent with the plan level.

Unused incidents for the subscription year cannot be carried over into the next year. For example, if you select the Bronze plan and use 4 out of 6 incidents during the subscription year, you cannot add the 2 remaining incidents to the next subscription year.

If you need to know how to do something specific and request assistance, this is considered an incident. However, if a question is general, such as "How do I create a campaign, report, or query?", this is considered a consulting or training request and applicable consulting charges will apply.

Technical Support will only resolve incidents related to the Mortgage Quest software and specific printing problems using Microsoft Word. Technical Support cannot help you with problems regarding other software, such as loan processing software, Windows, email, or faxing software.

When you purchase additional Mortgage Quest modules and marketing letters, you'll be provided with 30 days free Technical Support for any problems with the new module. These problems will not count toward the total number of incidents for a support plan. However, problems that occur after 30 days of purchase will be considered support incidents.

Automatic Program Update Service

Mortgage Quest program updates are downloaded from an update service website. When you start Mortgage Quest, it periodically checks the Internet to see if an update is available. Updates are automatically downloaded and installed from Mortgage Quest.

Program updates solve software problems reported by customers and include new features and enhancements that improve the program. Many times, Mortgage Quest must be modified to remain compatible with newer versions of software, such as Microsoft Word, Windows, WinfaxPro and loan processing and prequalification software.

Updates are free for customers who subscribe to annual support plans. Customers who are on the Pay Per Request plan are charged for each update.

Database Repair

If your computer shuts down because of a power failure or Windows crashes while Mortgage Quest is running, one or more databases may become corrupted because Windows did not close them properly. This can occur with any database program and is caused by Windows, not Mortgage Quest.

Mortgage Quest has a built-in database repair utility which can repair most database problems. However, if Mortgage Quest becomes inoperable or has problems because of a corrupted database, you may need to send in a backup of your data for repair. Technical Support has advanced database tools that analyze and repair corrupted databases.

Database repair services can be avoided by making frequent Mortgage Quest backups on multiple media, such as zip drives or multiple folders on your hard drive.

Database Repair is free to customers who subscribe to annual support and update plans. The cost is \$95 for customers on the Pay Per Request plan.

Response Time Goals

The response times stated for each support plan are goals, which may vary depending on call volume and other factors. The support plan you select determines the general priority as follows:

1. Gold Support Plan (1-2 Business Hours)
2. Silver Support Plan (2-6 Business Hours)
3. Bronze Support Plan (1 Business Day)
4. Pay Per Request Support Plan (Appointment Only).
Must be paid in advance of receiving assistance.

Consulting and Training

Mortgage Quest has many powerful features to help you market to various people. Whether you need help setting up specific marketing campaigns, learning a specific feature, or looking for long-term strategies, Market Focus' consulting services has what you need.

We are the experts on Mortgage Quest and can help you achieve your marketing objectives in a very cost effective manner. If you don't have time to figure out a certain feature or setup marketing campaigns, we can show you how in a fraction of the time.

The cost for training and consulting services is \$125 per hour and billed in 15-minute increments. The minimum charge for consulting or training is \$95.

Mortgage Quest training is also available online at www.emarketfocus.com at no cost.

License Agreement

This is an Agreement between the end user and Market Focus, Inc. The enclosed software program (Software) is licensed by Market Focus, Inc. for use only on the terms set forth herein. Please read this license Agreement. If you do not agree to these terms, return the entire unregistered product. By registering Mortgage Quest, you accept the terms and conditions of the license agreement and the return policy, as stated in the following section.

Grant of License. Market Focus, Inc. grants the right to use the Software as follows:

The single version can be installed on as many computers as desired as long it is registered to the same single user.

The multi-user enterprise system server software can be installed on only one computer. The client software can be installed on as many client workstations as desired, but simultaneous access is limited to the number of users purchased.

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Other Restrictions. You may not rent or lease the Software. You may not reverse engineer, de-compile, disassemble, or create derivative works from the Software.

General. This Agreement will be governed by the laws of the State of California, without regard to any conflicts of law principles. Any actions or procedures initiated in connection with the Software or this Agreement must be initiated in a court of competent jurisdiction only in the County of San Diego.

Software Limited Warranty. To the original customer only of Market Focus, Inc. the following warranty is provided;

Market Focus, Inc. warrants that (1) the Software, unless modified, will perform substantially the functions described in the documentation provided by Market Focus, Inc. and (2) the media on which the software is furnished is free from defects in materials and workmanship under normal use. Market Focus,

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Some states do not allow the exclusion of implied warranties; so the above exclusion may not apply to you. This warranty gives you specific rights; you may have other rights, which may vary from state to state.

Limitations of Remedies. Regardless of whether any remedy set forth herein fails of its essential purpose, in no event will Market Focus, Inc. be liable to you for any special, consequential, indirect or similar damages, including any lost profits or lost data arising out of the use or inability to use the software or any data supplied therewith, even if Market Focus, Inc. or anyone else has been advised of the possibility of such damages, or for any claim by any other party.

Some states do not allow the limitation or exclusion of liability for incidental or consequential damages; so the above limitation may not apply to you.

In no case shall Market Focus, Inc. liability exceed the purchase price of the Software.

Return Policy

Market Focus will only accept unregistered copies of Mortgage Quest for return. Mortgage Quest is registered when the program has been installed on a computer and a registration password has been issued.

However, if you experience a critical technical problem that renders Mortgage Quest non-operational and one in which Market Focus cannot resolve within 30 days of purchase, Market Focus will accept the return of the product or refund the cost of a non-operational module. After 30 days, Market Focus will not accept a return under any circumstances.