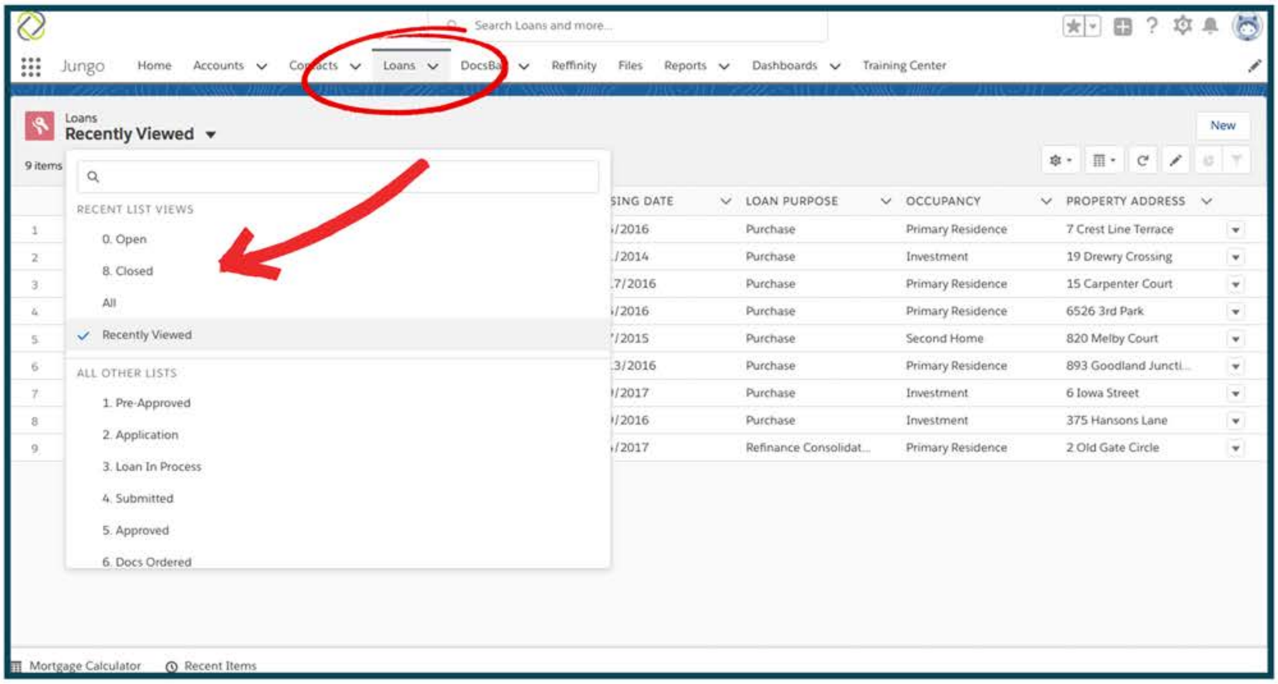
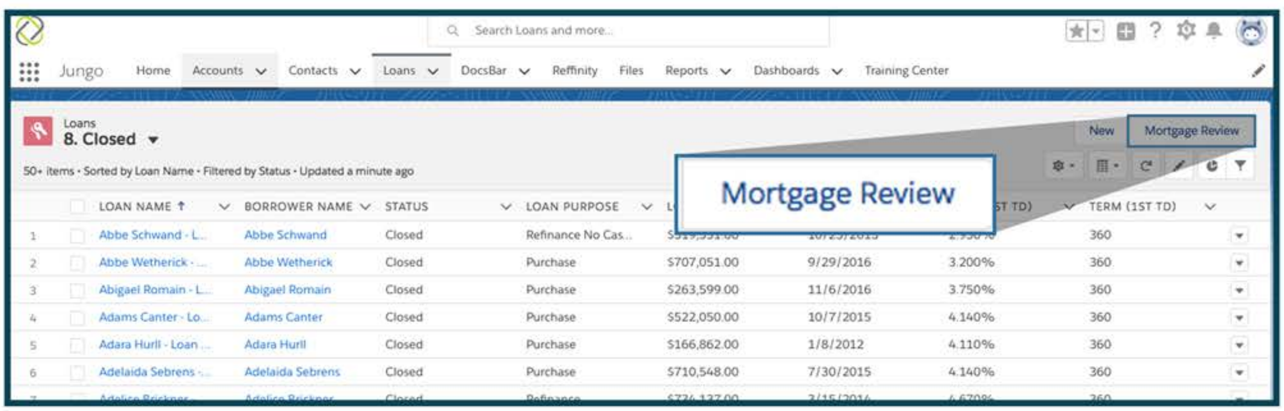
# HOW TO USE THE JUNGO INTEGRATION

**1** After logging in, **CLICK ON** the **LOANS** tab.




**SELECT** **OPEN**, **CLOSED**, and **ALL** loans under the drop down menu in the search bar.

**2** Then, **CLICK ON** the **MORTGAGE REVIEW** button at the top right corner.



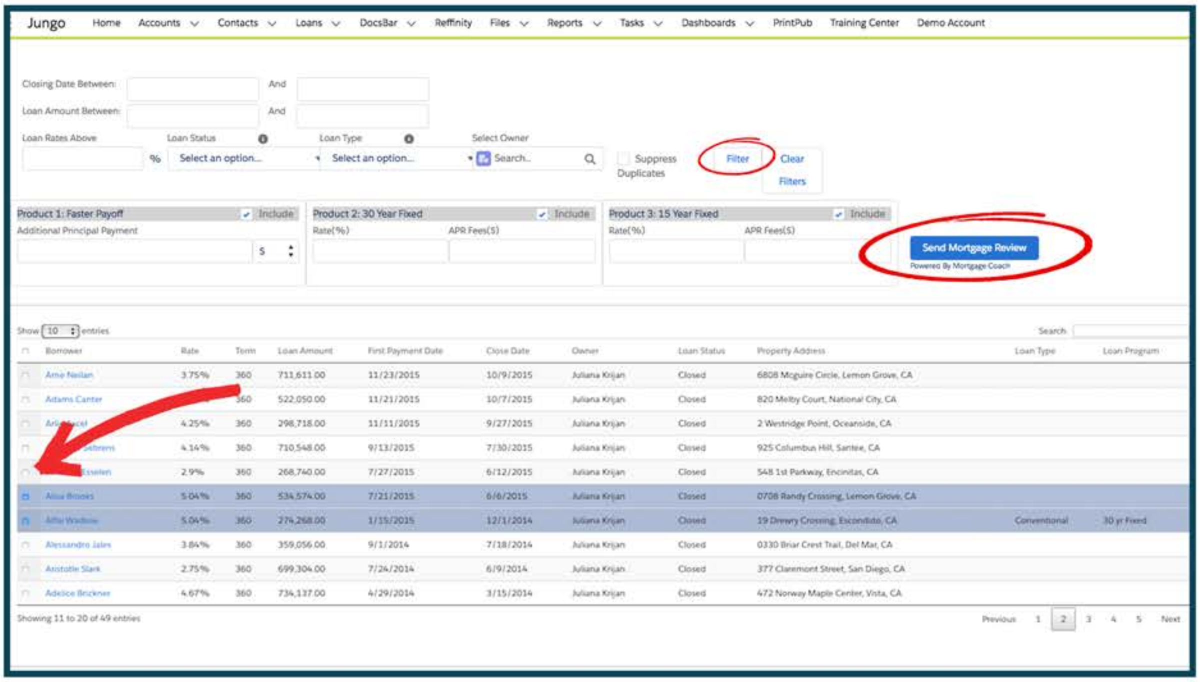
**3**

**INPUT** your desired filters, then click on Filter .

You can filter and sort by these categories:

- Close Loan Date (Date Range)
- Rate (Above a certain target rate)
- Loan Amount
- Loan Types (FHA, VA, Conventional)

**CHECK** to make sure the Accelerated Payment information for your scenario is correct.

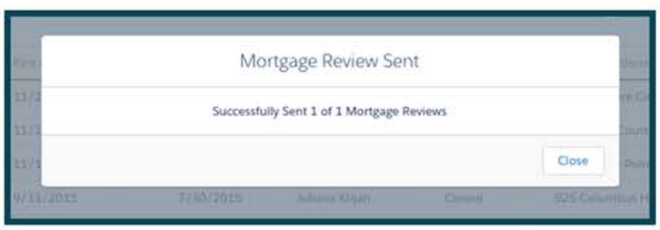



**4**

Then, **CLICK** the check boxes by client's names. You may choose more than one borrower.

Once you're done, **CLICK** on Send Mortgage Review

Once you send, you will receive a pop up notification that your emails have been sent.

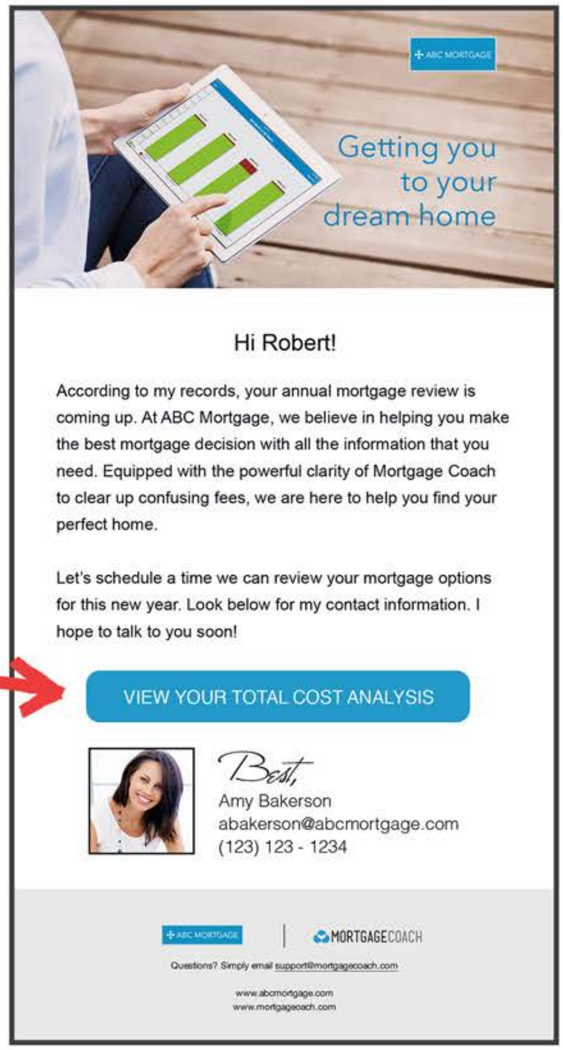


## Sample Automated Email

You can create an annual mortgage review by creating a scenario for your closed loans.

When you click Send Mortgage Review , an email similar to the one on the right will be sent to the client.

They can view their report by clicking on VIEW YOUR TOTAL COST ANALYSIS




## Walking through the Presentation

Here is a sample Annual Mortgage Review presentation.
Use this opportunity to ask what is new in their lives, show them what future savings they have, and educate them on their options.