

HOW TO USE THE JUNGO INTEGRATION

1

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

The screenshot shows the Jungo web application interface. The navigation bar at the top includes 'Home', 'Accounts', 'Contacts', 'Loans', 'DocsBar', 'Refinify', 'Files', 'Reports', 'Dashboards', and 'Training Center'. The 'Loans' tab is circled in red. Below the navigation bar, there is a search bar with a dropdown menu open, showing 'Recently Viewed' selected. A red arrow points to this option. The main content area displays a table of loans with columns for 'SING DATE', 'LOAN PURPOSE', 'OCCUPANCY', and 'PROPERTY ADDRESS'. The table contains 9 items.

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.

The screenshot shows the Jungo web application interface with the 'Loans' tab selected. The search bar dropdown menu is open, showing '8. Closed' selected. A blue box highlights the 'Mortgage Review' button in the top right corner of the search bar area. The main content area displays a table of loans with columns for 'LOAN NAME', 'BORROWER NAME', 'STATUS', 'LOAN PURPOSE', 'L...', 'ST TD', and 'TERM (1ST TD)'. The table contains 50+ items, sorted by Loan Name and filtered by Status.

3

INPUT your desired filters, then click on [Filter](#).

You can filter and sort by these categories:

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

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

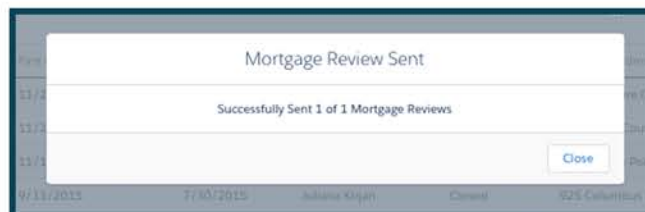
The screenshot shows the Jungo software interface. At the top, there is a navigation bar with options like Home, Accounts, Contacts, Loans, DocsBar, Refinify, Files, Reports, Tasks, Dashboards, PrintPub, Training Center, and Demo Account. Below this, there are several filter sections: 'Closing Date Between', 'Loan Amount Between', 'Loan Rates Above', 'Loan Status', 'Loan Type', and 'Select Owner'. A 'Filter' button is circled in red. Below the filters, there are three product selection sections: 'Product 1: Faster Payoff', 'Product 2: 30 Year Fixed', and 'Product 3: 15 Year Fixed'. A 'Send Mortgage Review' button is circled in red. Below the filters and products, there is a table with columns: Borrower, Rate, Term, Loan Amount, First Payment Date, Close Date, Owner, Loan Status, Property Address, Loan Type, and Loan Program. A red arrow points to the 'Borrower' column. At the bottom, there is a pagination bar showing 'Showing 11 to 20 of 49 entries' and 'Previous 1 2 3 4 5 Next'.

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.

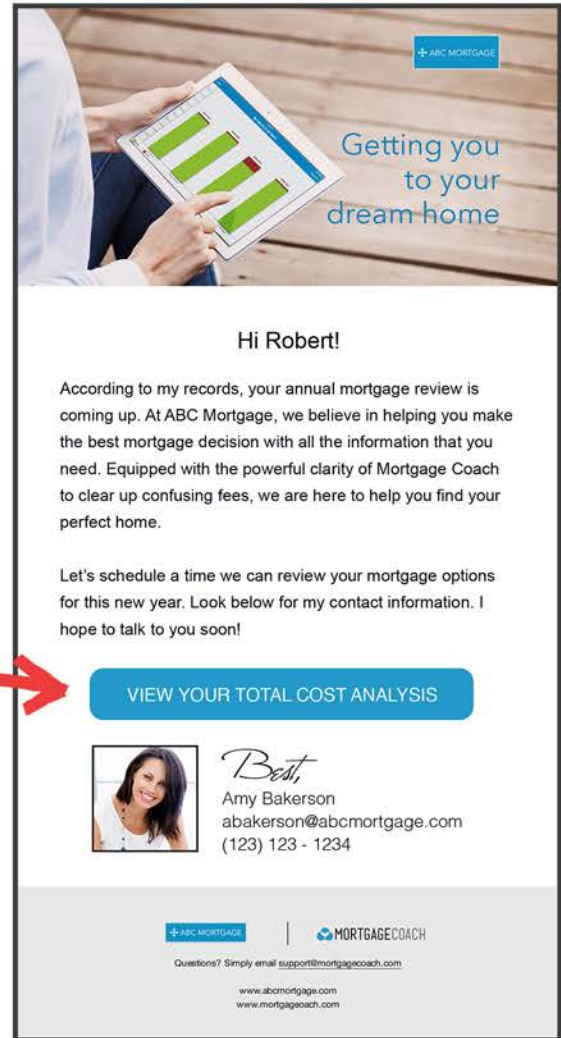
When you click

[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.

