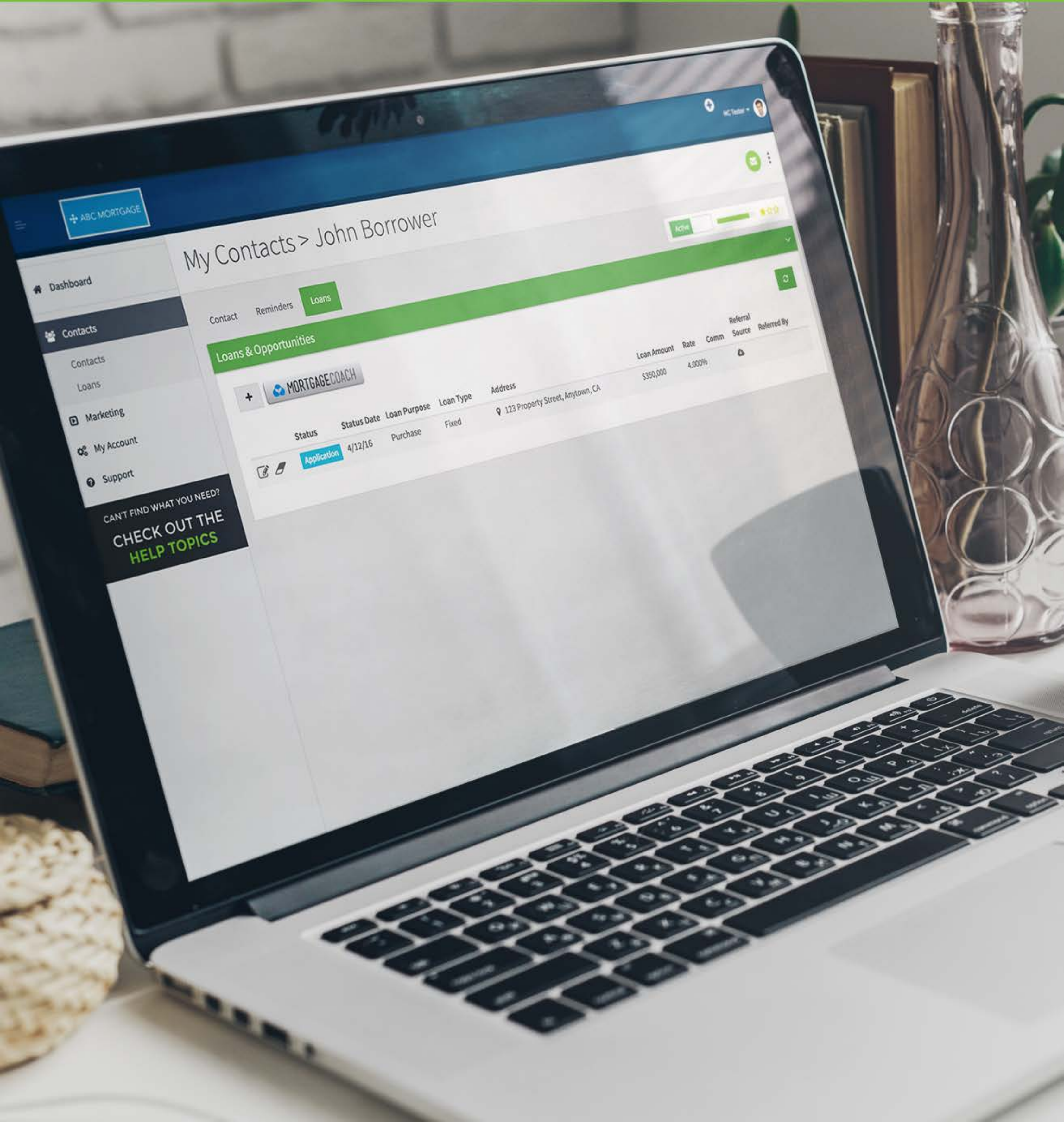
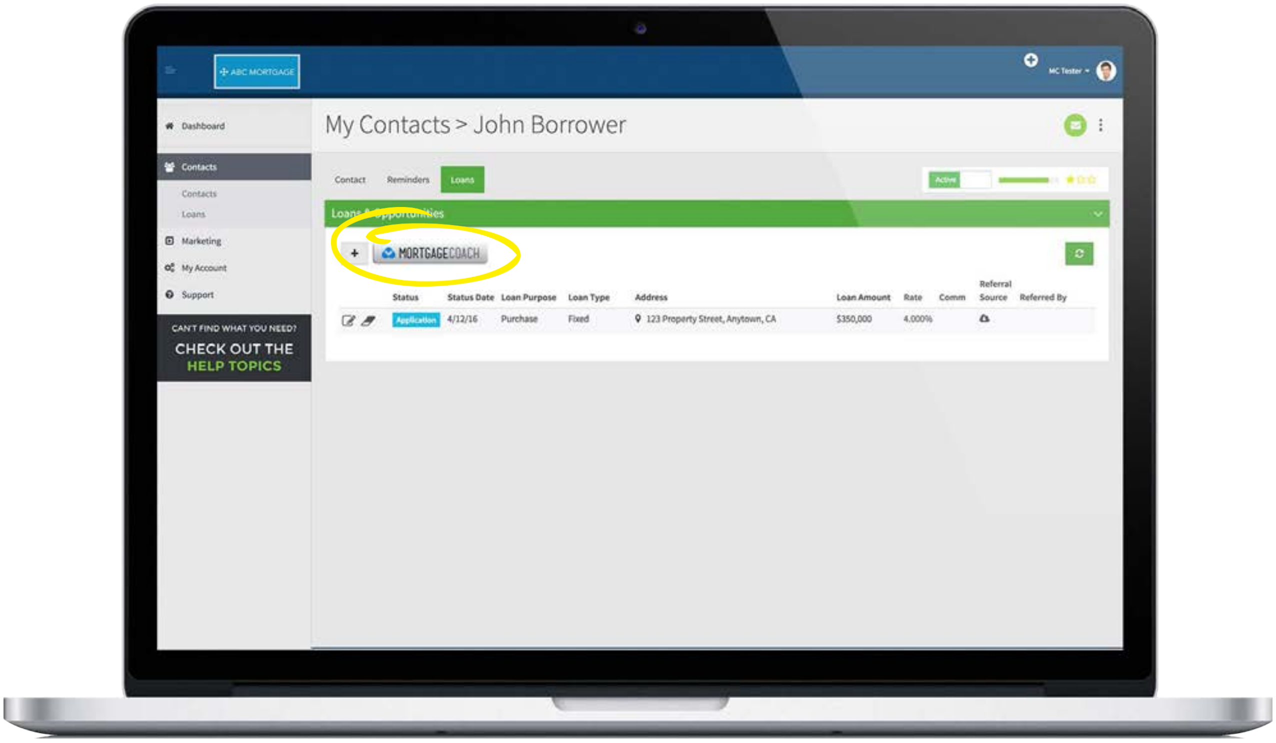
INTEGRATION GUIDE

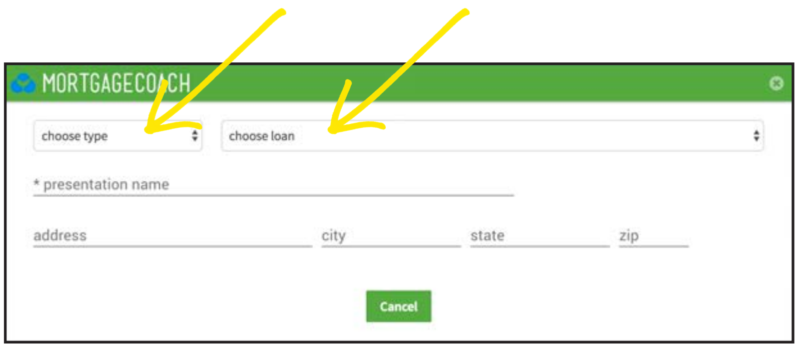


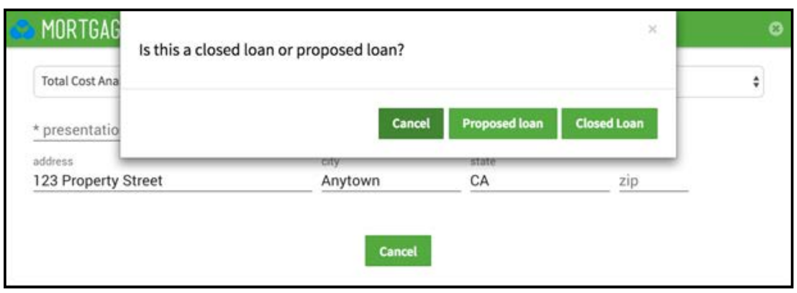
HOW TO USE THE VELMA INTEGRATION

1 On your CONTACTS page, **CHOOSE** a contact. **GO TO** LOANS, on the top menu bar. Then, **CLICK ON** the MORTGAGECOACH button.

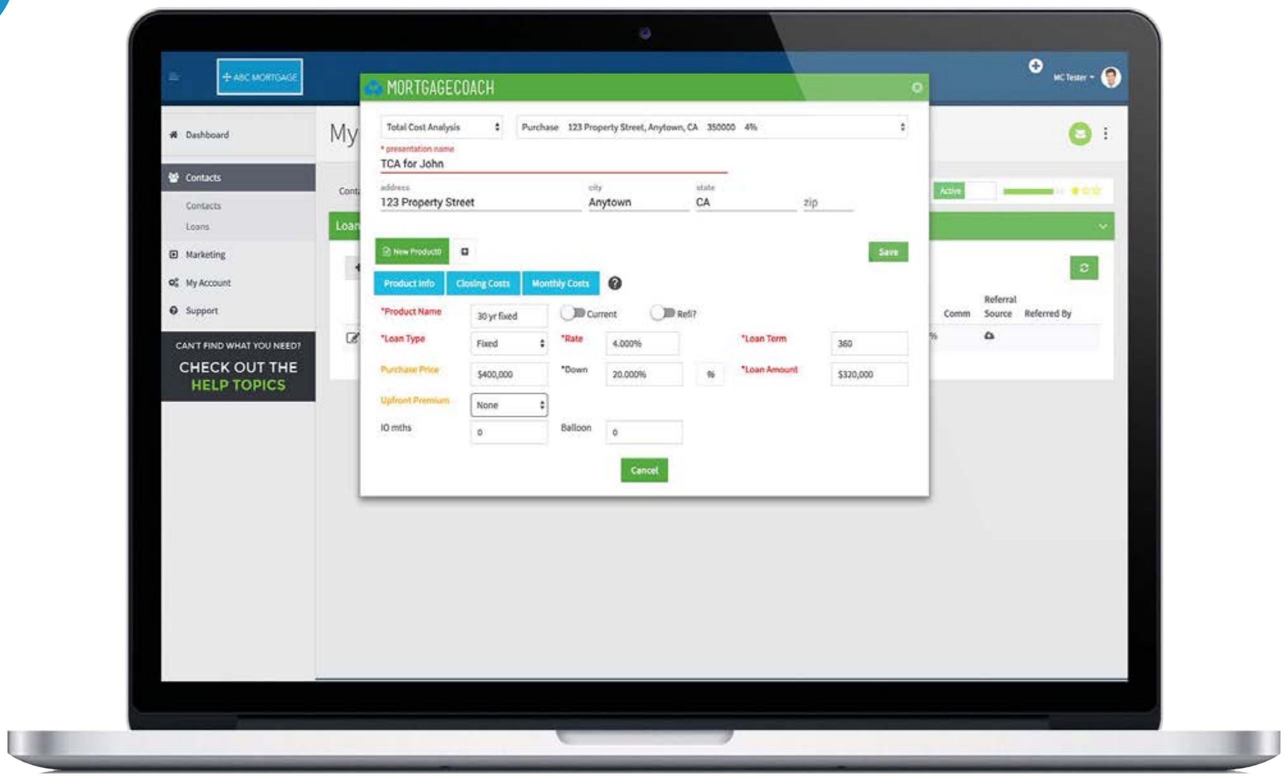


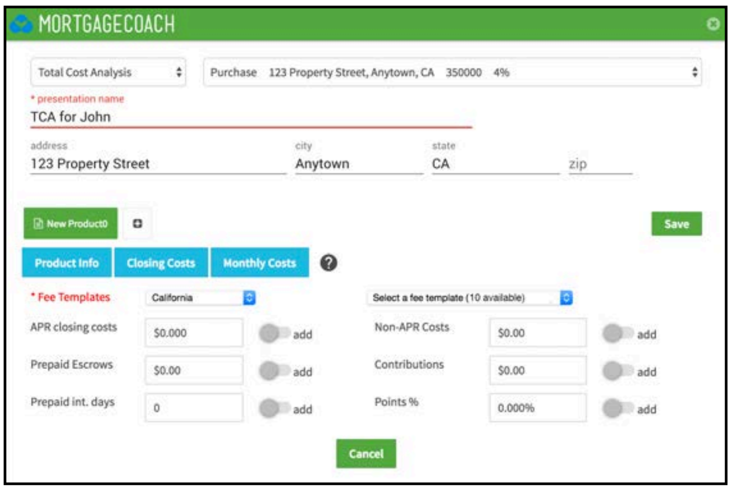
2 Once you choose your type of PRESENTATION and LOAN, **CHOOSE** PROPOSED or CLOSED LOAN.



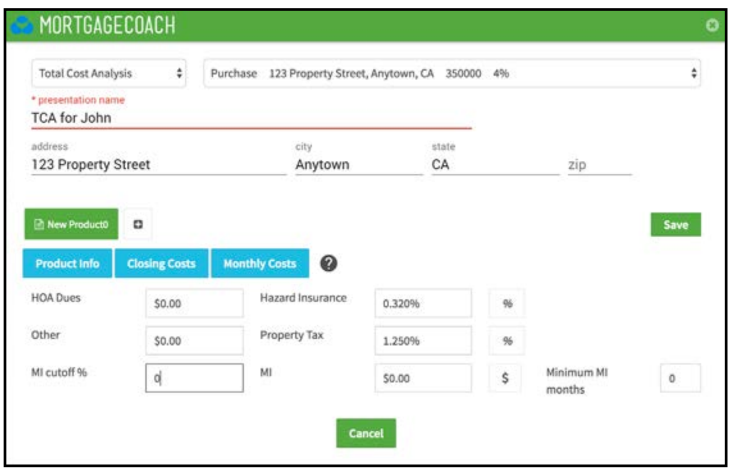


3 **FILL OUT** the fields as you go through the tabs.





Under CLOSING COSTS, **CHOOSE** the fee state and fee template.

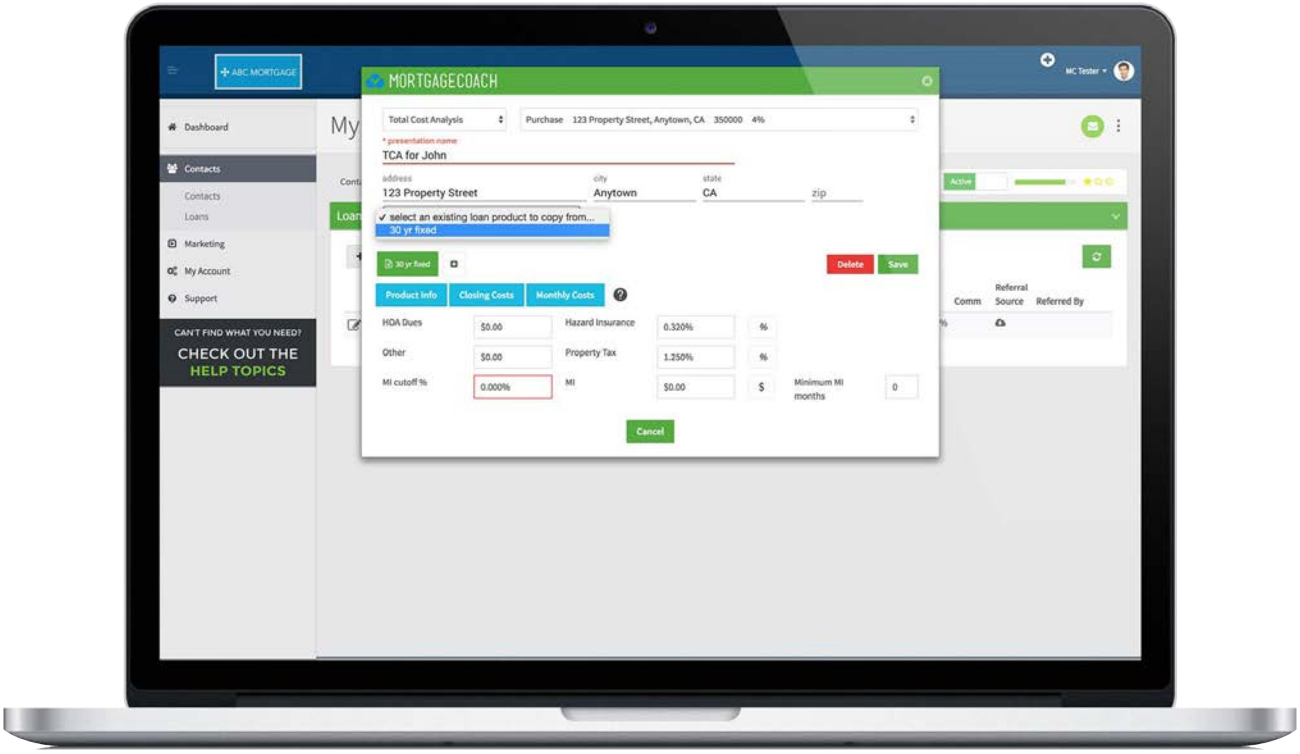


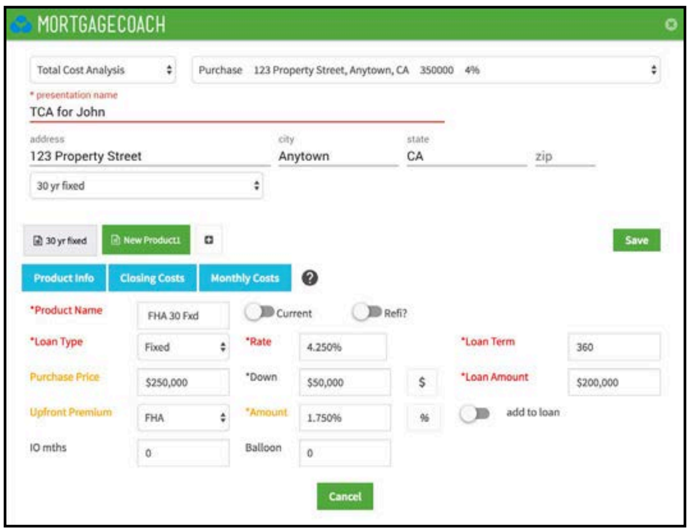
Under MONTHLY COSTS, **FILL IN** the necessary info.

CLICK SAVE.

4

To add another product, go to SELECT AN EXISTING LOAN PRODUCT TO COPY FROM...





FILL OUT the 2nd product info.

(Closing Costs and Monthly Costs info will be copied from the 1st product.)

ADD up to 4 products.

CLICK SAVE.

5

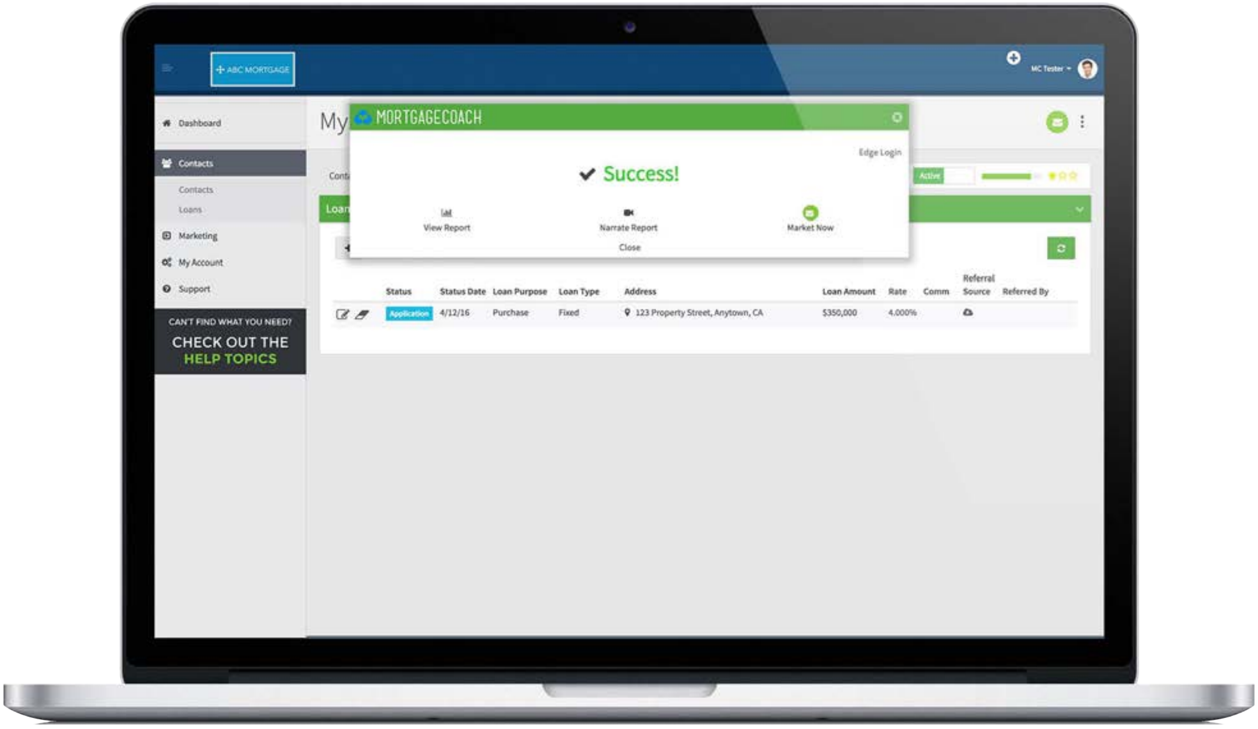
CLICK ON

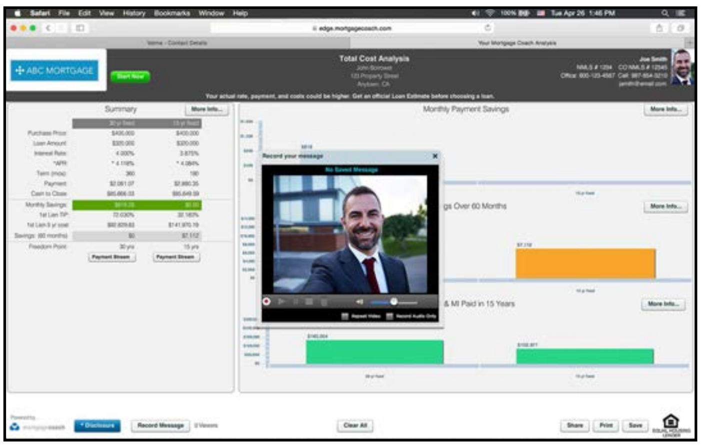
Submit to create your Mortgage Coach experience

to create your presentation.

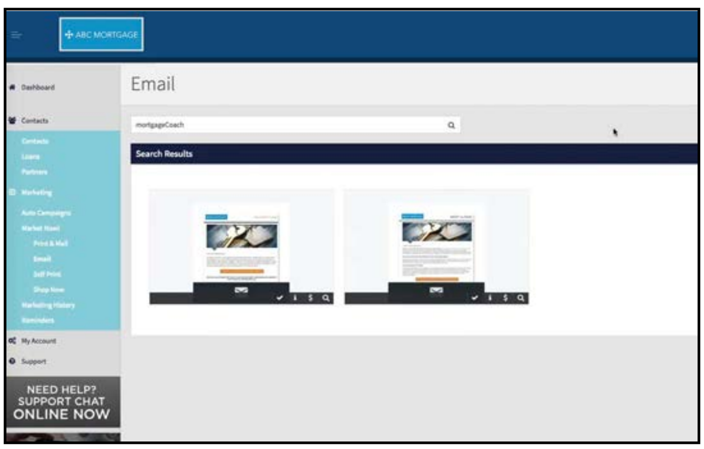
6

Now you can, VIEW REPORT, add a video by clicking on NARRATE REPORT , or send through email by clicking on MARKET NOW.





To add video, click on NARRATE REPORT. Click on RECORD MESSAGE on the bottom left of the screen. **RECORD** in the pop-up and then close the pop-up.



Go to MARKETING to send branded emails and share your report with your clients.