



INTEGRATION GUIDE



My Contacts > John Borrower

Contact Reminders Loans

Loans & Opportunities




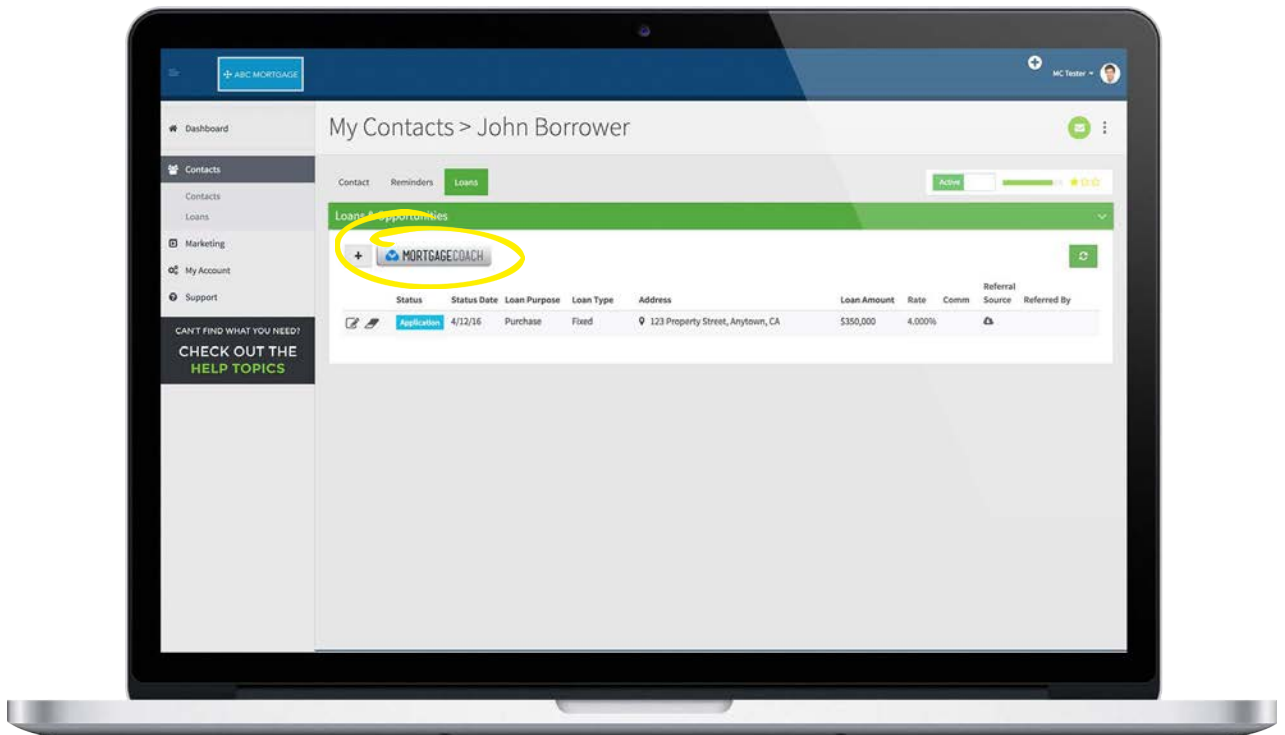
Status	Status Date	Loan Purpose	Loan Type	Address	Loan Amount	Rate	Comm	Referral Source	Referred By
Application	4/12/16	Purchase	Fixed	123 Property Street, Anytown, CA	\$350,000	4.000%			

CAN'T FIND WHAT YOU NEED?
CHECK OUT THE
HELP TOPICS

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  button.



2

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

MORTGAGECOACH

choose type choose loan

* presentation name

address city state zip

Cancel

MORTGAGECOACH

Is this a closed loan or proposed loan?

Total Cost Ana

* presentation

address city state zip

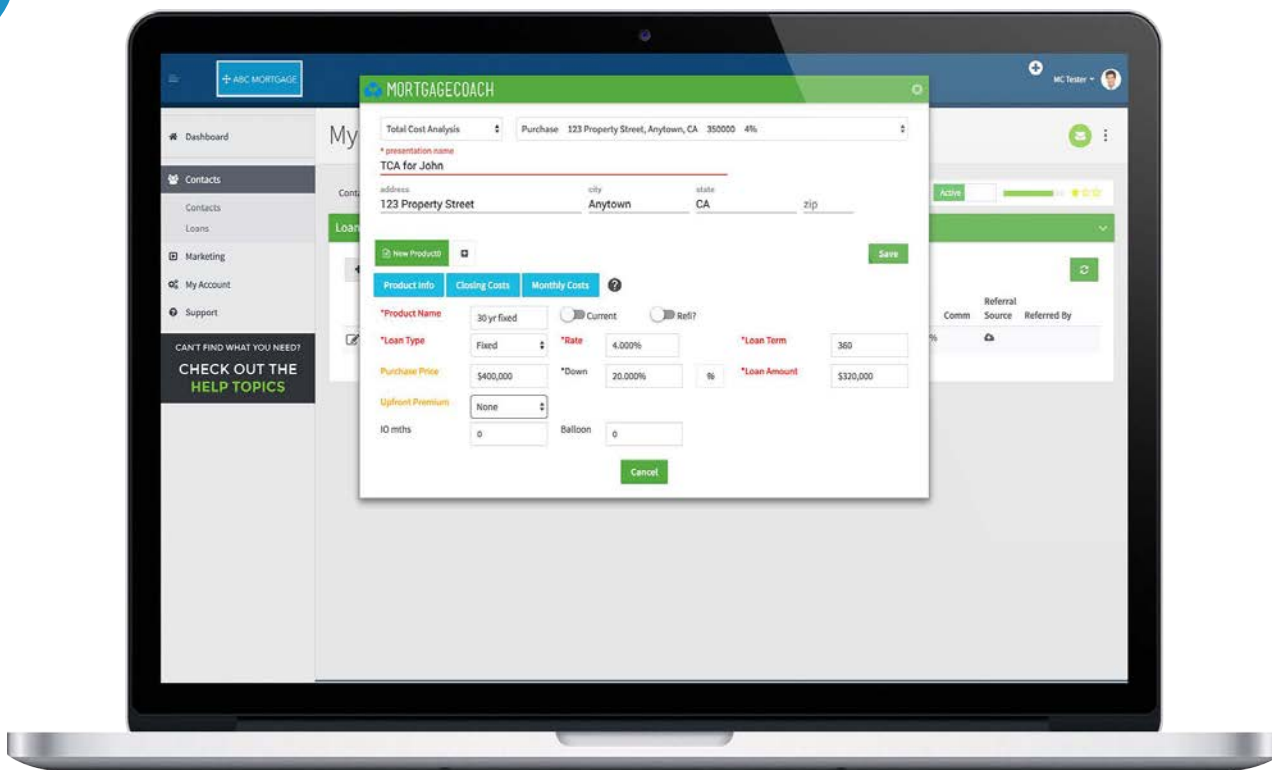
123 Property Street Anytown CA

Cancel Proposed loan Closed Loan

Cancel

3

FILL OUT the fields as you go through the tabs.



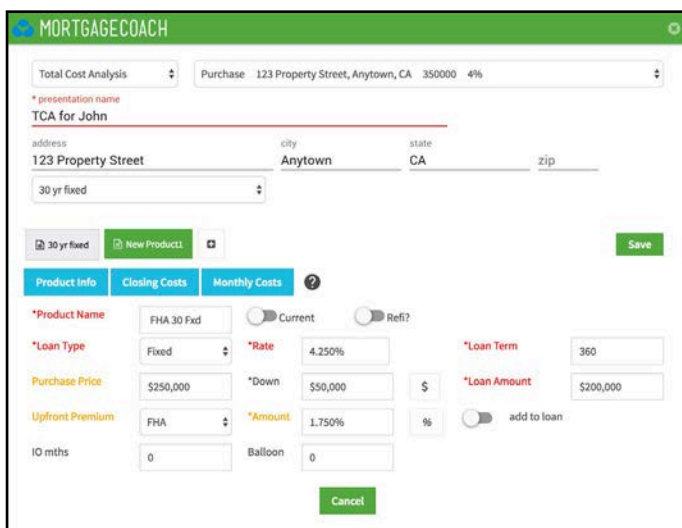
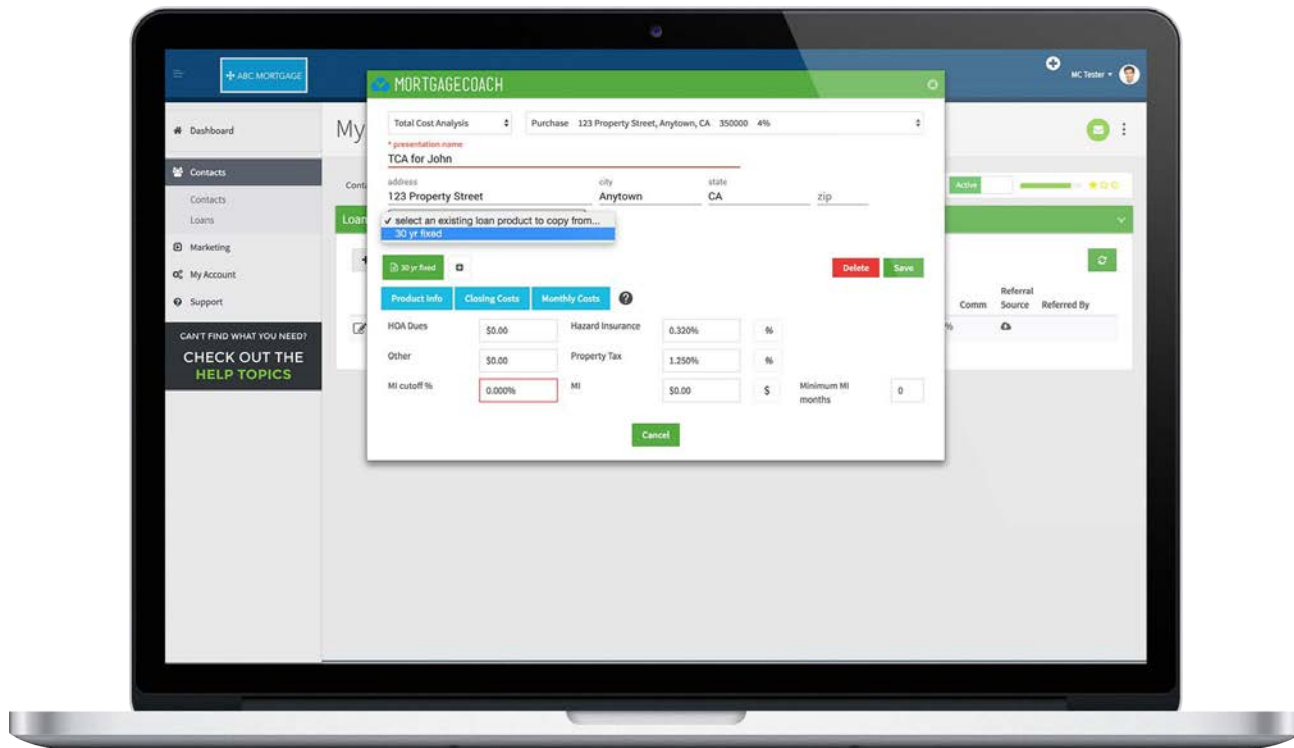
Under **CLOSING COSTS**, **CHOOSE** the fee state and fee template.

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

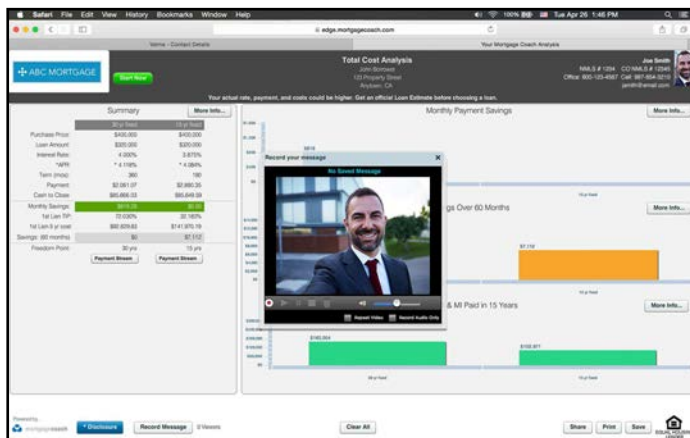
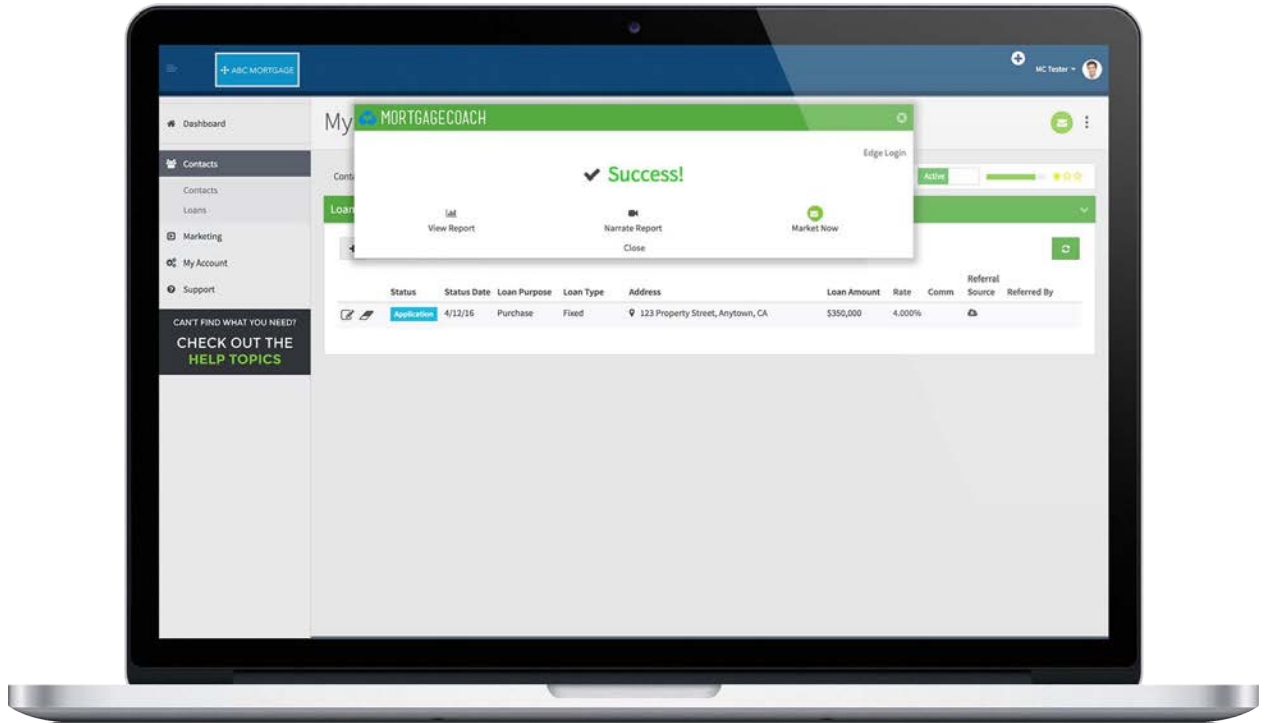
Submit to create your Mortgage Coach experience

to create your presentation.

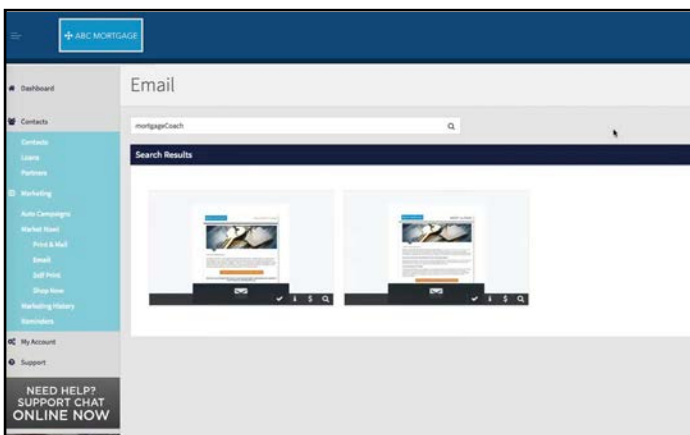


6

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.