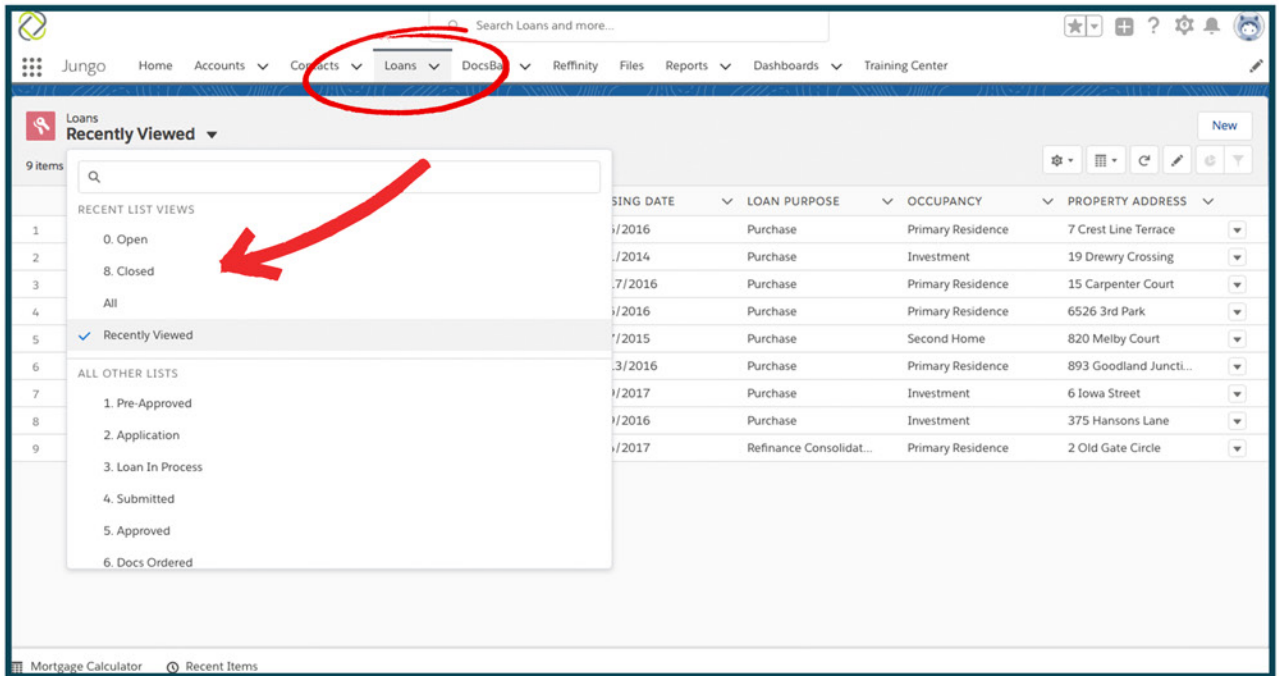


# HOW TO USE THE JUNGO INTEGRATION

1

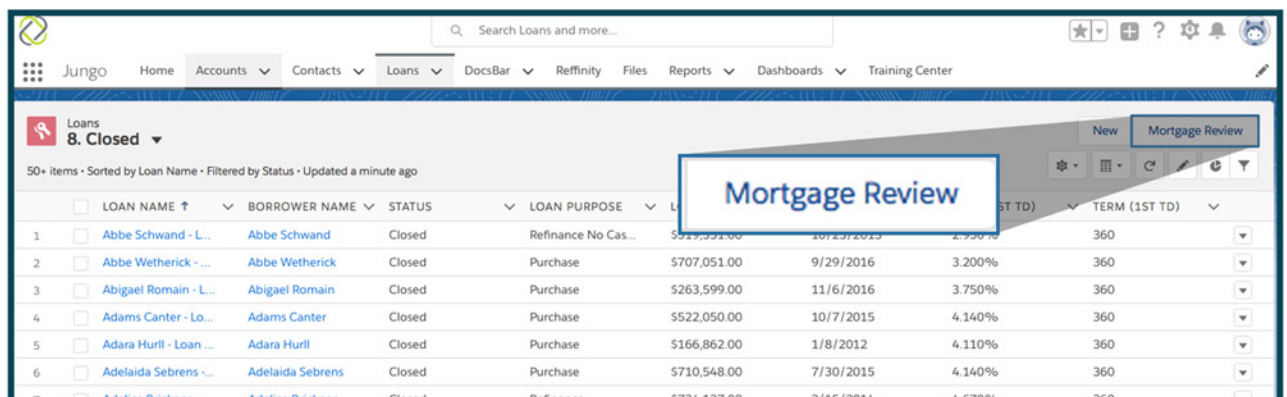
After logging in, **CLICK ON** the **LOANS** tab.



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

**TYPE IN** the Accelerated Payment information for your scenario.

The screenshot shows the Junjo software interface. At the top, there are navigation tabs: Home, Accounts, Contacts, Loans, DocuBar, Refinity, Files, Reports, Dashboards, and Training Center. Below the navigation is a search bar and a filter menu. The filter menu includes sections for 'Closing Date Between', 'Loan Amount Between', 'Loan Rates Above', 'Loan Status', 'Loan Type', 'Loan Program', and 'Select Owner'. There are three product selection boxes: 'Product 1: Faster Payoff' (Rate: 3.75%, APR Fee: 125), 'Product 2: 30 Year Fixed' (Rate: 4.25%, APR Fee: 2,430), and 'Product 3: 15 Year Fixed' (Rate: 3.75%, APR Fee: 2,354). A 'Filter' button is circled in red. Below the filter menu is a table of mortgage loans. A red arrow points to the 'Send Mortgage Review' button in the filter menu, and another red arrow points to the 'Send Mortgage Review' button in the table header. The table has columns for Borrower, Rate, Term, Loan Amount, First Payment Date, Close Date, Owner, Loan Status, Property Address, Loan Type, and Loan Program. The table shows 11 entries, with the first entry being Arne Neilan.

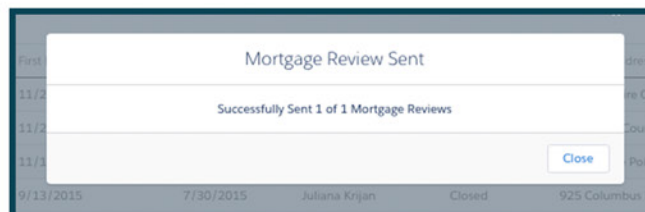
Borrower	Rate	Term	Loan Amount	First Payment Date	Close Date	Owner	Loan Status	Property Address	Loan Type	Loan Program
Arne Neilan	3.75%	360	711,611.00	11/23/2015	10/9/2015	Juliana Krijan	Closed	6808 McGuire Circle, Lemon Grove, CA		
Adams Carter	4.25%	360	522,050.00	11/21/2015	10/7/2015	Juliana Krijan	Closed	820 Melby Court, National City, CA		
Arline...	4.25%	360	298,718.00	11/11/2015	9/27/2015	Juliana Krijan	Closed	2 Westridge Point, Oceanside, CA		
...	4.14%	360	710,548.00	9/13/2015	7/30/2015	Juliana Krijan	Closed	925 Columbus Hill, Santee, CA		
...	2.9%	360	268,740.00	7/27/2015	6/12/2015	Juliana Krijan	Closed	548 1st Parkway, Encinitas, CA		
Alicia Brooks	5.04%	360	534,574.00	7/21/2015	6/6/2015	Juliana Krijan	Closed	0708 Randy Crossing, Lemon Grove, CA		
Alfa Wadlow	5.04%	360	274,268.00	1/15/2015	12/1/2014	Juliana Krijan	Closed	19 Drewry Crossing, Escondido, CA	Conventional	30 yr Fixed
Alessandro Jakes	3.84%	360	359,056.00	9/1/2014	7/18/2014	Juliana Krijan	Closed	0330 Bnar Crest Trail, Del Mar, CA		
Anisotie Stark	2.75%	360	699,304.00	7/24/2014	6/9/2014	Juliana Krijan	Closed	377 Claremont Street, San Diego, CA		
Adelice Brinkner	4.67%	360	734,137.00	4/29/2014	3/15/2014	Juliana Krijan	Closed	472 Norway Maple Center, Vista, CA		

# 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.

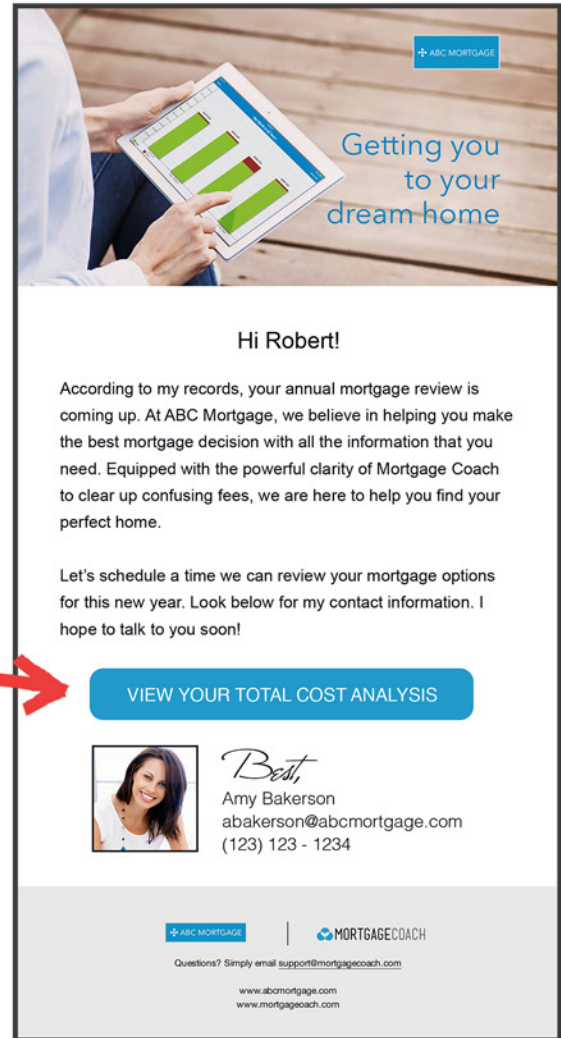
When you click

[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.

