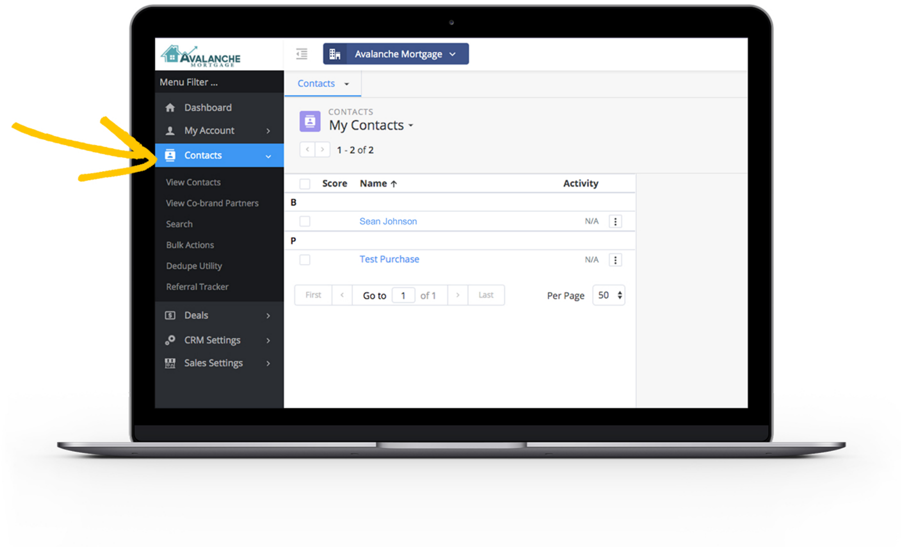
How to use the Surefire Integration with Mortgage Coach

1

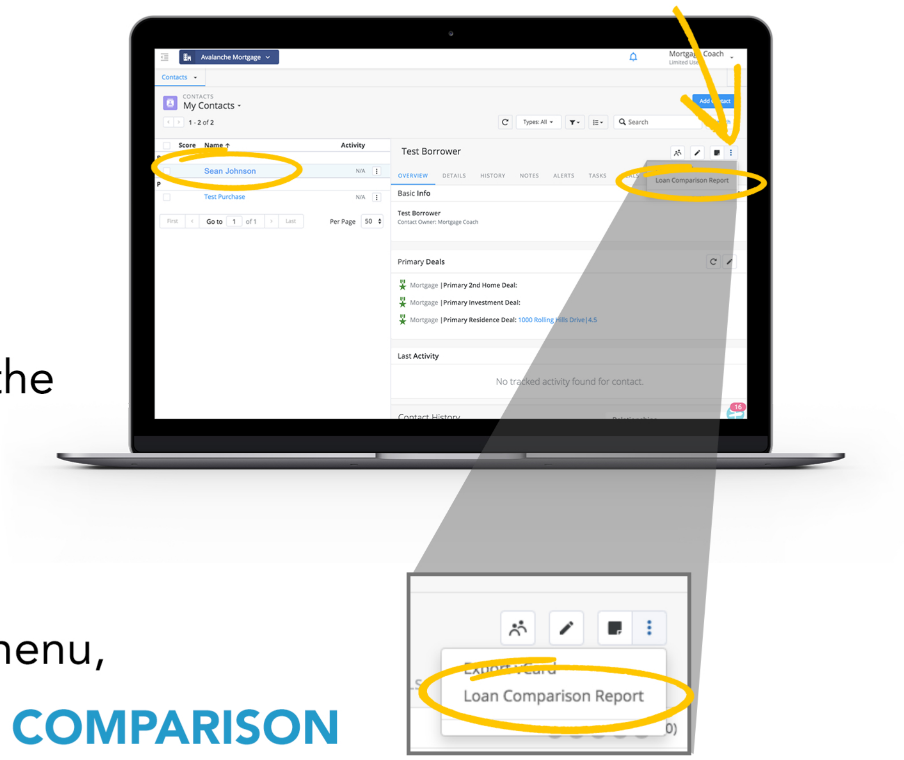
After signing in, **CLICK ON** **CONTACTS** on the left panel.



2

CLICK ON the contact's name.

CLICK ON ⋮ the menu found on the top right of the contact's record.



On the drop down menu, **CHOOSE** **LOAN COMPARISON REPORT**.

3

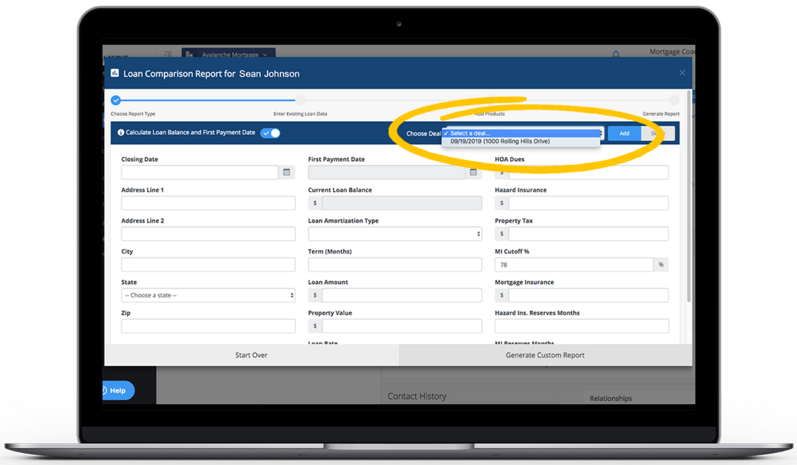
On the pop up,

CLICK ON BUILD WITH EXISTING LOAN for refinance or **BUILD WITH NEW LOAN PRODUCTS** for purchase.

4

For refinance:

under the **CHOOSE DEAL** drop down menu, **CLICK** a deal to pre-populate existing loan data within Surefire for refinance options.



For purchase:

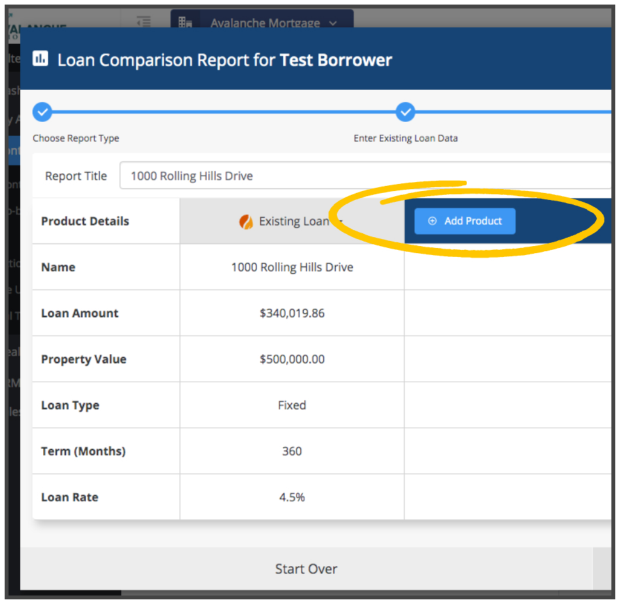
TYPE IN new data for purchase options.

Once the information is complete,

CLICK ON ADD to add loan products.

5

CLICK ON ADD PRODUCT. Add up to four loan scenarios.



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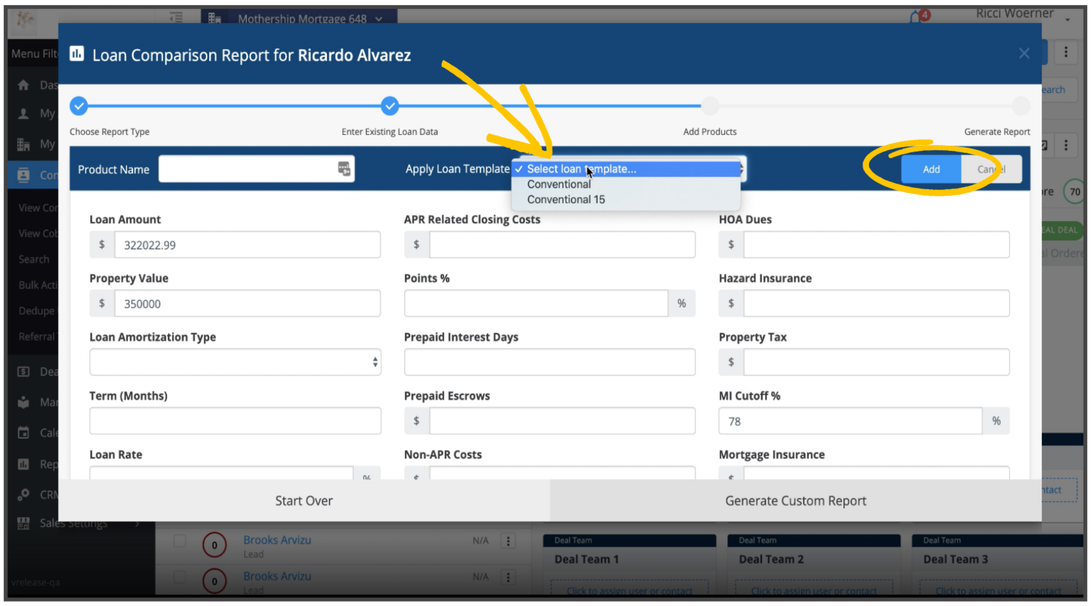
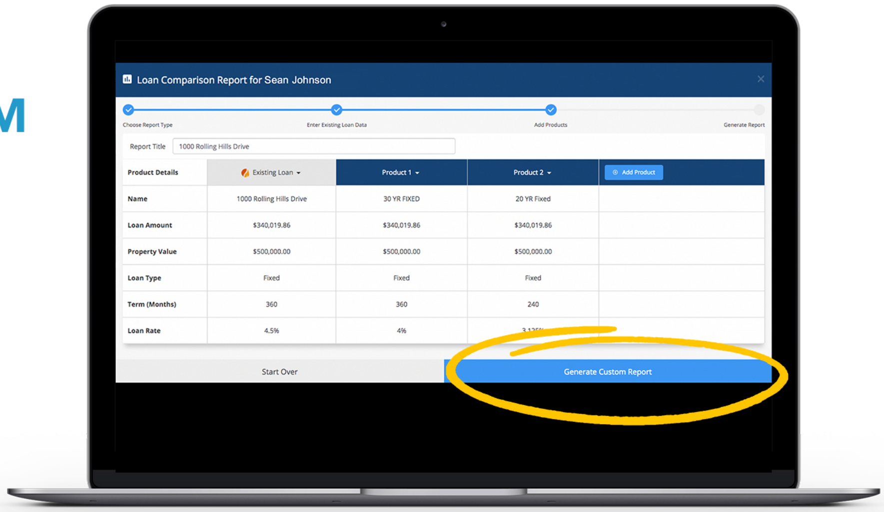


Under **APPLY LOAN TEMPLATE** drop down menu, **CLICK ON** a loan template.

CLICK ON ADD.

7

CLICK ON **GENERATE CUSTOM REPORT**.



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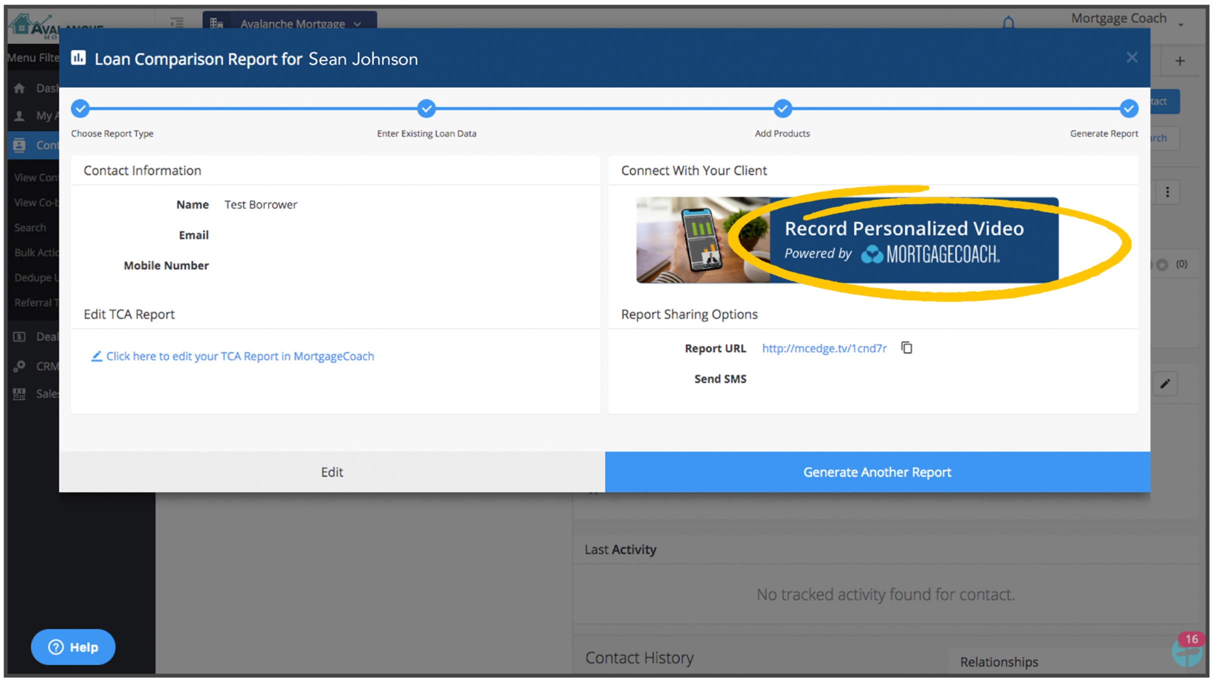
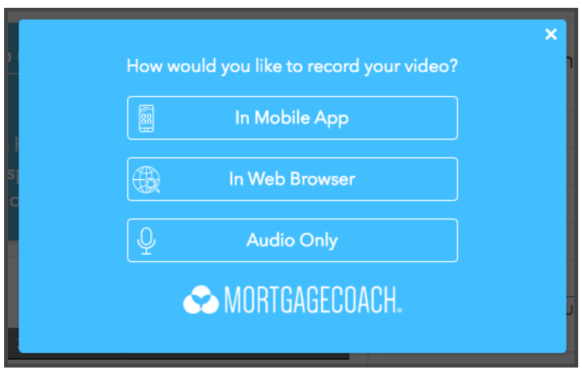


Now your report is generated

Finalize your presentation by **ADDING VIDEO**.

CLICK ON RECORD PERSONALIZED VIDEO.

On the following page, choose to use your **MOBILE** or **COMPUTER** to add video.



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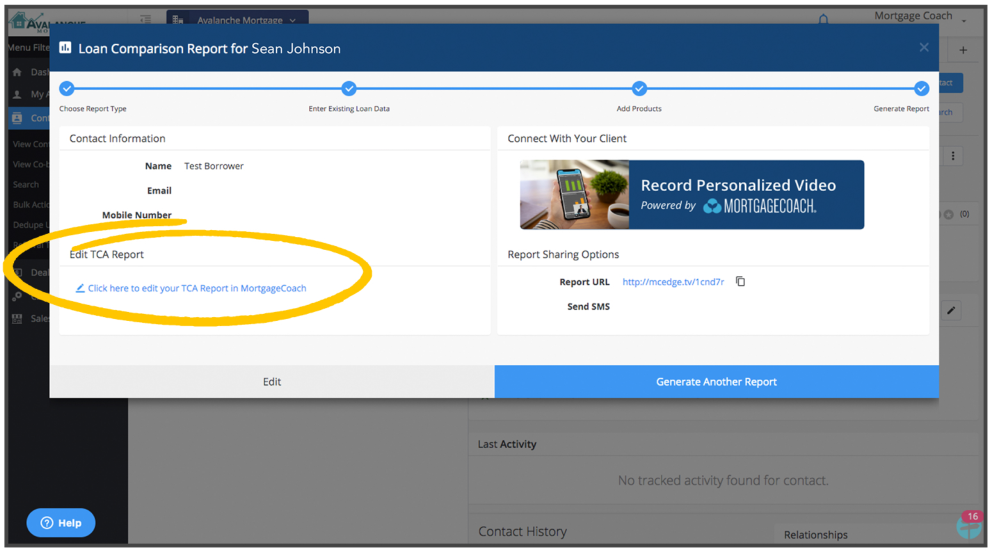
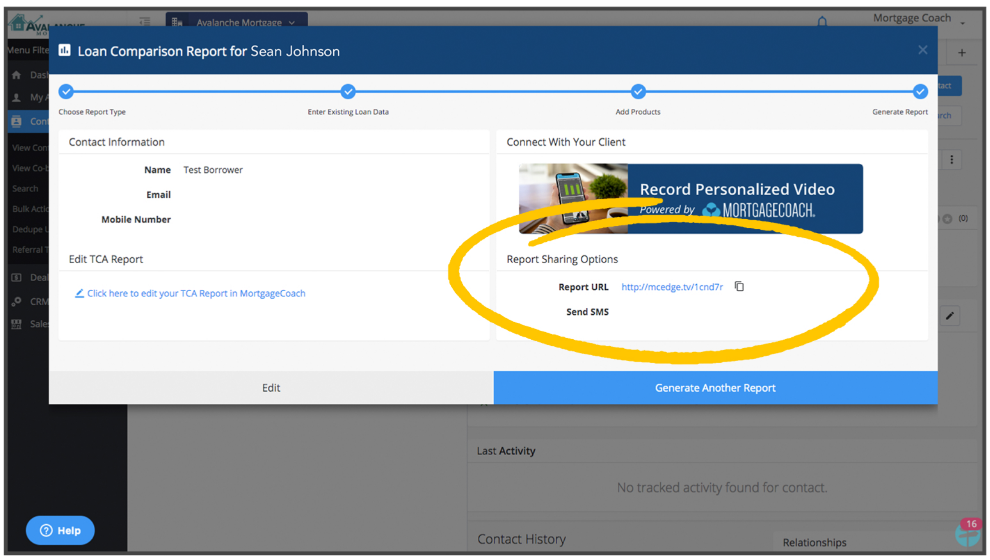


To make changes to your report, **CLICK** **EDIT TCA REPORT** to be routed to your Mortgage Coach Account. From the Advice Engine dashboard, locate the client record and click on it to begin making changes as needed.

10



SHARE your report by copying your TCA link and sending via **SMS** or **EMAIL**.