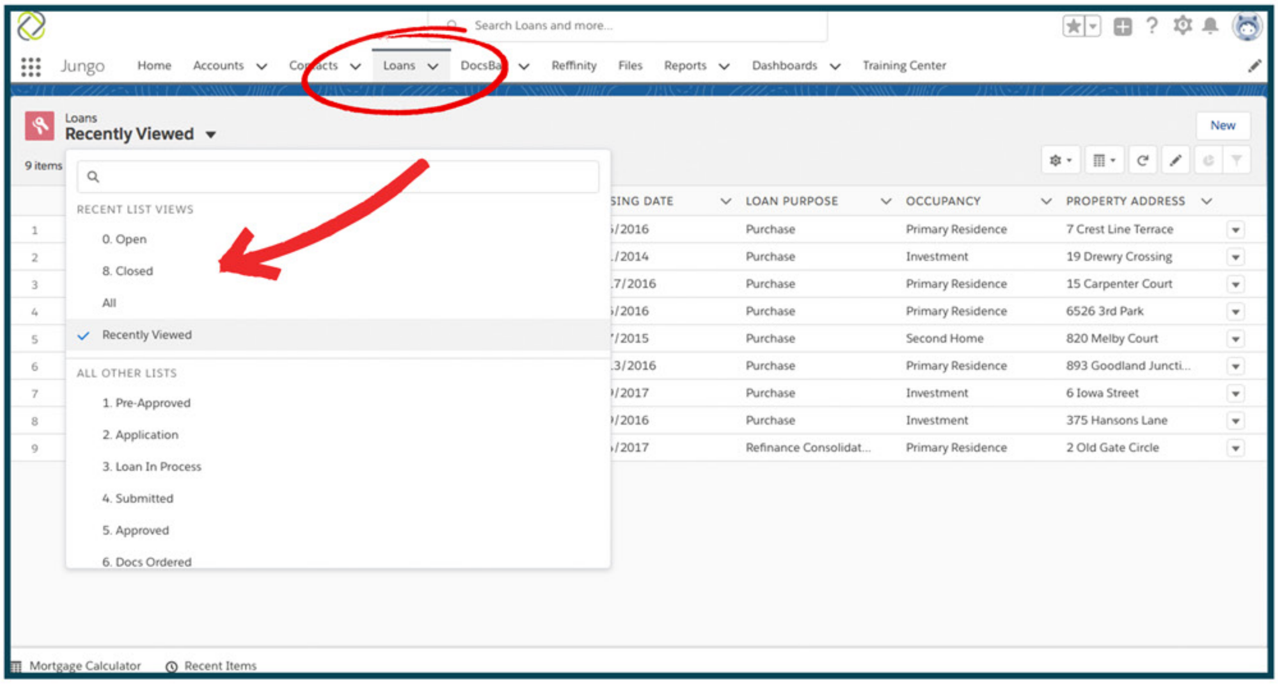
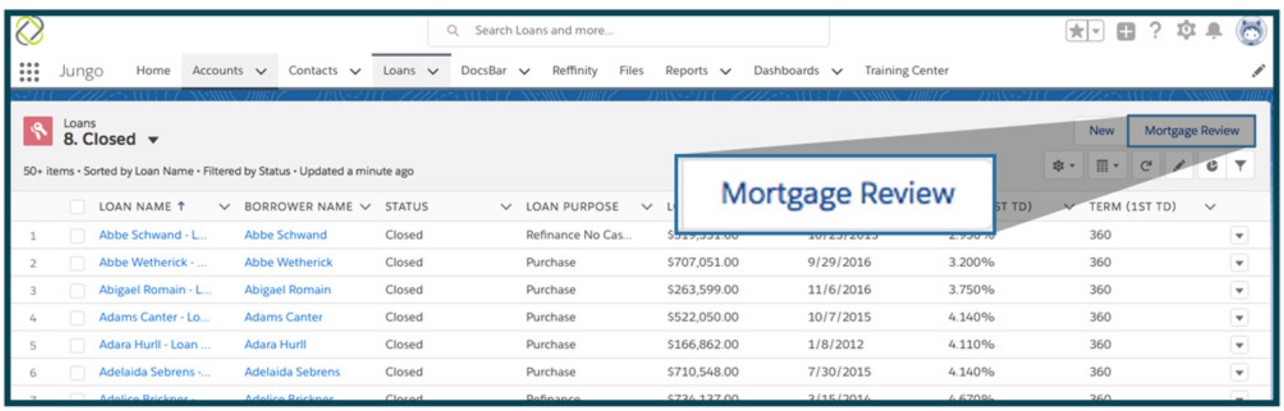
HOW TO USE THE JUNGO INTEGRATION

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.



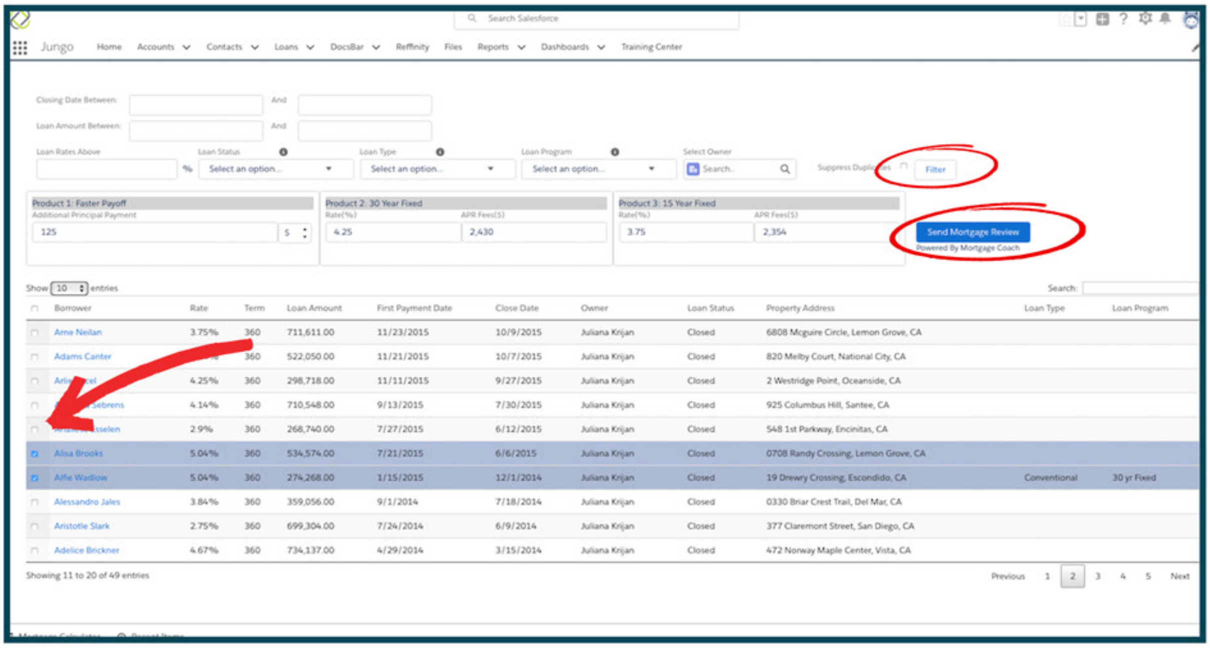
3

INPUT your desired filters, then click on Filter .

You can filter and sort by these categories:

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

TYPE IN the Accelerated Payment information for your scenario.

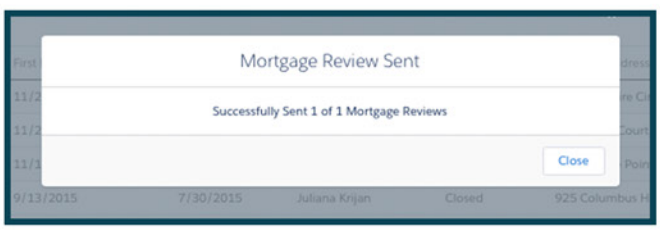


4

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.

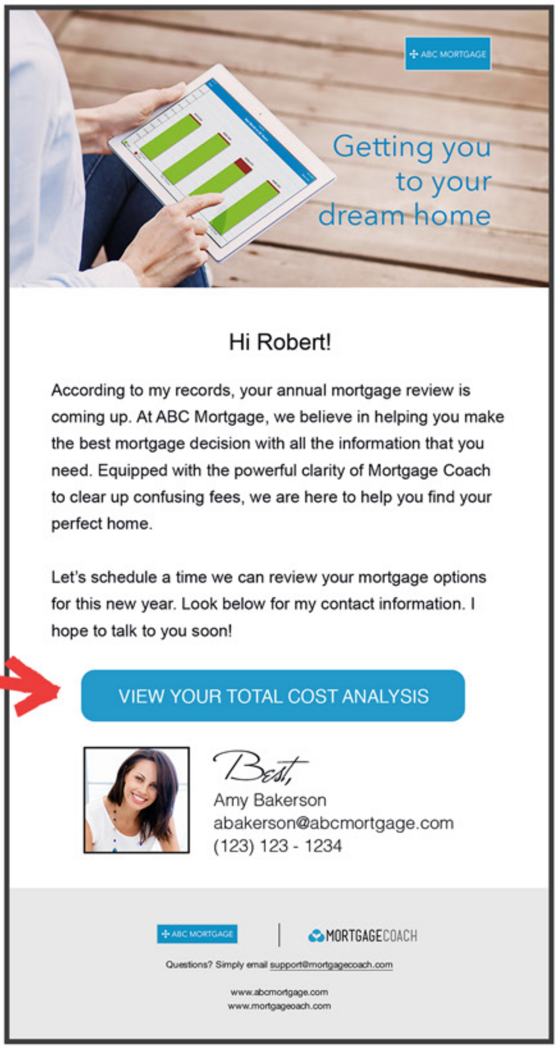


Sample Automated Email

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.