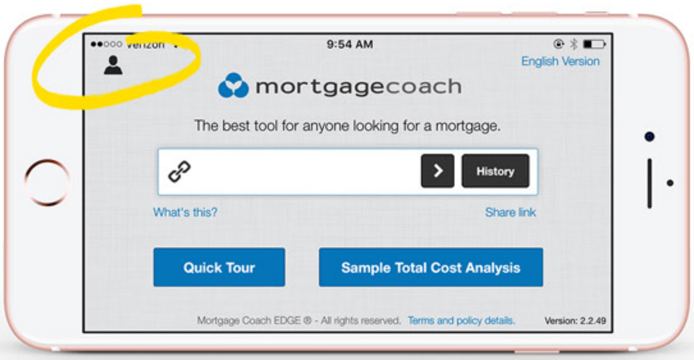
MORTGAGE COACH

HOW TO CREATE A TOTAL COST ANALYSIS ON MOBILE

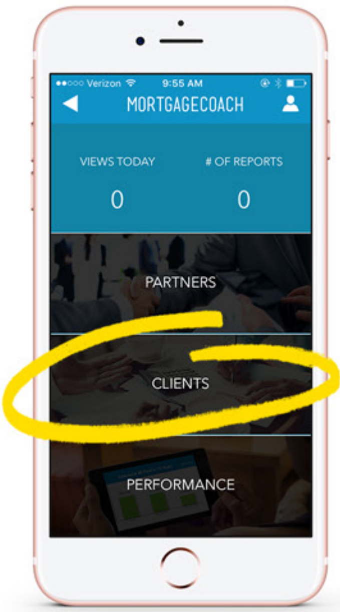
HOW TO USE THE MOBILE APP TO CREATE A TOTAL COST ANALYSIS

1 CLICK ON

at the top left corner of the home screen.

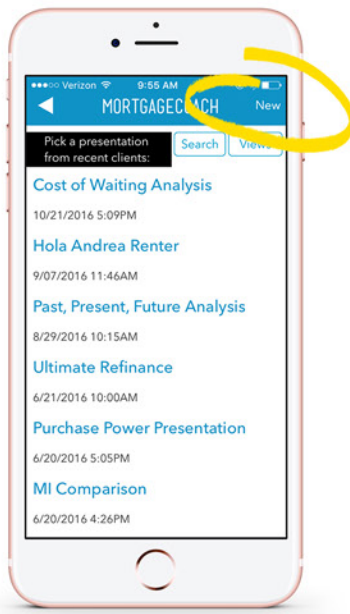


2 SIGN IN and then CLICK ON CLIENTS

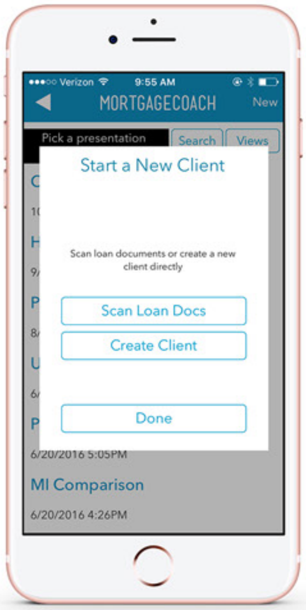


3 CLICK ON NEW

at the top right corner.



4



On the pop-up:

SCAN LOAN DOCS: This will create a new client and auto-populate the fields with information from the scanned document.

CREATE CLIENT: This will create a new client and allow you to fill in the client information.

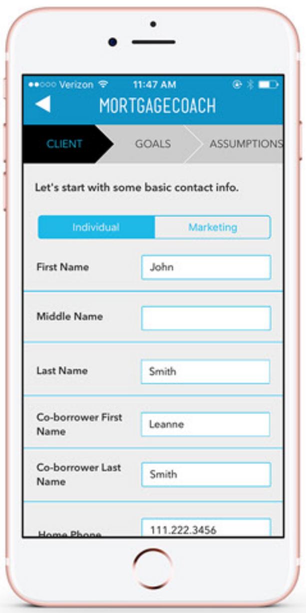
5

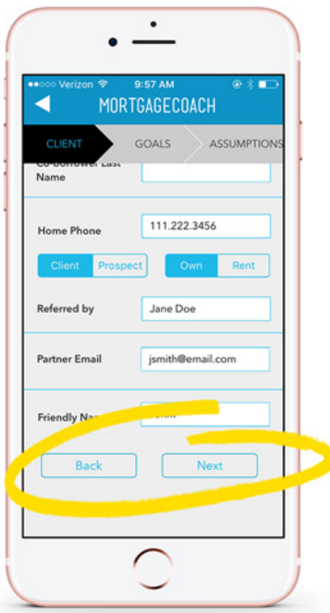
Once you click on **CREATE CLIENT**,

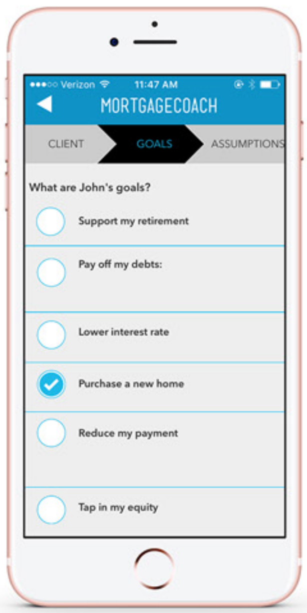
FILL OUT the fields as you move through the tabs.

CLICK ON NEXT at the bottom of the page to move to the next tab or **SWIPE** left or right.

At any time, you can scroll through the tabs and click on any tab.







6

On the last tab, **CLICK NEXT**.

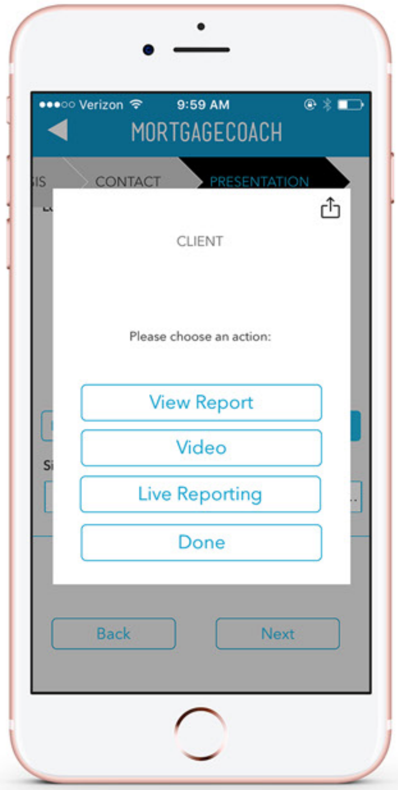
A pop-up will then appear.

SELECT:

VIEW REPORT to view the report on your phone.

VIDEO to add a video.

LIVE REPORTING to highlight and move through your report in real-time as your clients follow on their mobile devices.



7

CLICK ON  at the top right corner of the pop-up to share your report.

CHOOSE how you would like to share your report.