nafconnect

USER GUIDE

Abstract

This document describes how to use and troubleshoot the NAF Connect platform.

Audience

NAF Connect Users

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List of Acronyms

See **Table 1** below for a list of Acronyms commonly used across New American Funding (NAF) Tech.

Table 1 - List of Acronyms

Acronym	Meaning
NAF	New American Funding
BV	BankerView
LO	Loan Officer
URL	Uniform Resource Locator
IM	Instant Messenger
IT	Information Technology
MMI	Mobile Market Intelligence
RE	Real Estate
REA	Real Estate Agent
URLA	Uniform Residential Loan Application

How to Use

This document is written using headings and subheadings. Each heading level can be seen in the **Table of Contents** and is used to navigate each topic. All figures are listed in the **List of Figures** and all tables are listed in the **List of Tables** (if applicable). The **Table of Contents**, **List of Figures**, and **List of Tables** are comprised of hyperlinked cross references within the document. A list of acronyms is provided at the beginning of this document for ease of reference.

Hyperlinks are used (if applicable) for websites and cross-references within the document. Hyperlinked cross-references are used to reference figures titles, steps, headings, and page numbers. To use the hyperlinked cross-references, press and hold the **[CTRL]** key and use the keypad or mouse to select the hyperlinked item.

Full screen images are used to provide context on the location of buttons and features. Black boxes indicate the highlighted sections of the screen.

Notes are used as applicable to outline essential information. See the **Notes** section for the use and explanation of these conventions. All supplemental information is placed at the end of the document in appendices labeled with a letter (e.g., Appendix A, Appendix B etc.).

Notes

Notes contain information that is not procedural and used to outline important information that will not lead to injury or damaged equipment. Notes are placed before the section, steps, or paragraph it pertains to.

Note:

CHAPTER 1: GENERAL INFORMATION

Introduction

NAF Connect is a platform for Real Estate Agents (REAs) and builders to connect to NAF Loan Officers and access loan information. NAF Connect is comprised of information about clients associated with the user and their progress in the loan application. The platform syncs user information with other NAF products (e.g., NAF Link and BankerView). This manual describes how to use the platform and perform basic procedures.

NAF Connect is available on mobile devices with identical features. Screenshots in this user guide typically depict the desktop version of NAF Connect.

Contact Support@NAF-Connect.com with any questions or concerns.

Commonly Used Sections

The following sections are used commonly in typical workflows:
- Client List
- Creating Marketing Materials
- Refer a Client
- Loan Milestones
- Printing a Pre-Approval Letter

REA and Builder Account Types

NAF Connect is used by both REA and Builder partners with NAF to check deal information. Account type is set at creation (see Enrollment) and cannot be changed. The following account types are available:
- **REA**: The standard NAF Connect experience. REAs can use all features available in the platform and have specific fields that only apply to their account type (e.g., NMLS ID Number and States Licensed in).
- **Builder**: Builder accounts cannot use the Social Sign In feature and do not contain any fields related to REA licensing.

Automatic Log Out

NAF Connect automatically logs users out of the platform after ten minutes of inactivity on any page in the platform. **Still there?** pop-up (Figure 1) displays after nine minutes of inactivity and selecting the **Stay Logged In** button allows the user to continue their session.
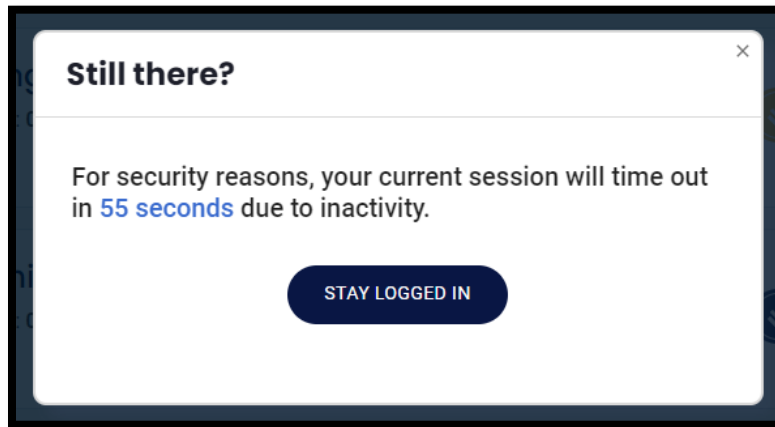
Figure 1 - Still There? Pop-up – Typical

NAF Connect Login Page

The NAF Connect URL ([https://naf-connect.com/)](https://naf-connect.com/) directs the user to the NAF Connect Login Page (Figure 2 and Figure 3). The NAF Connect login page details key elements and features of the platform (Figure 3).
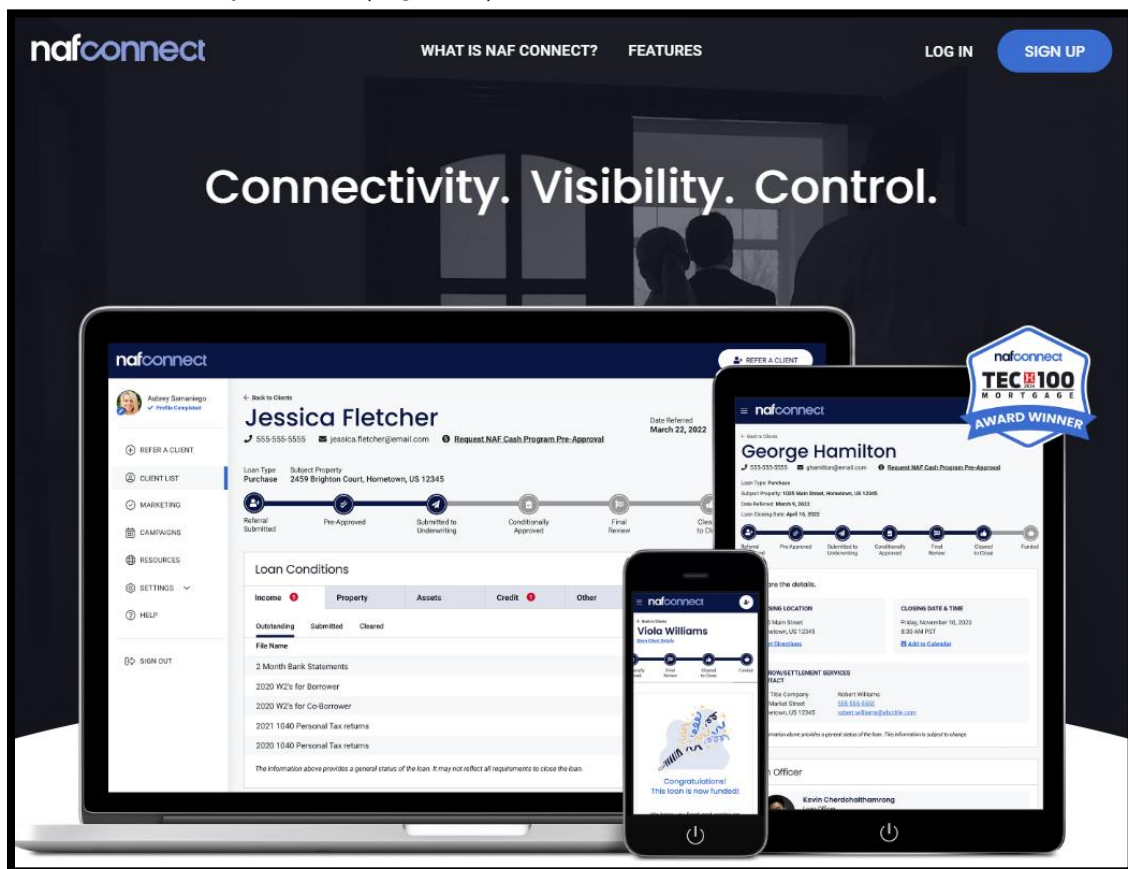
Figure 2 - NAF Connect Login Page 1 of 2
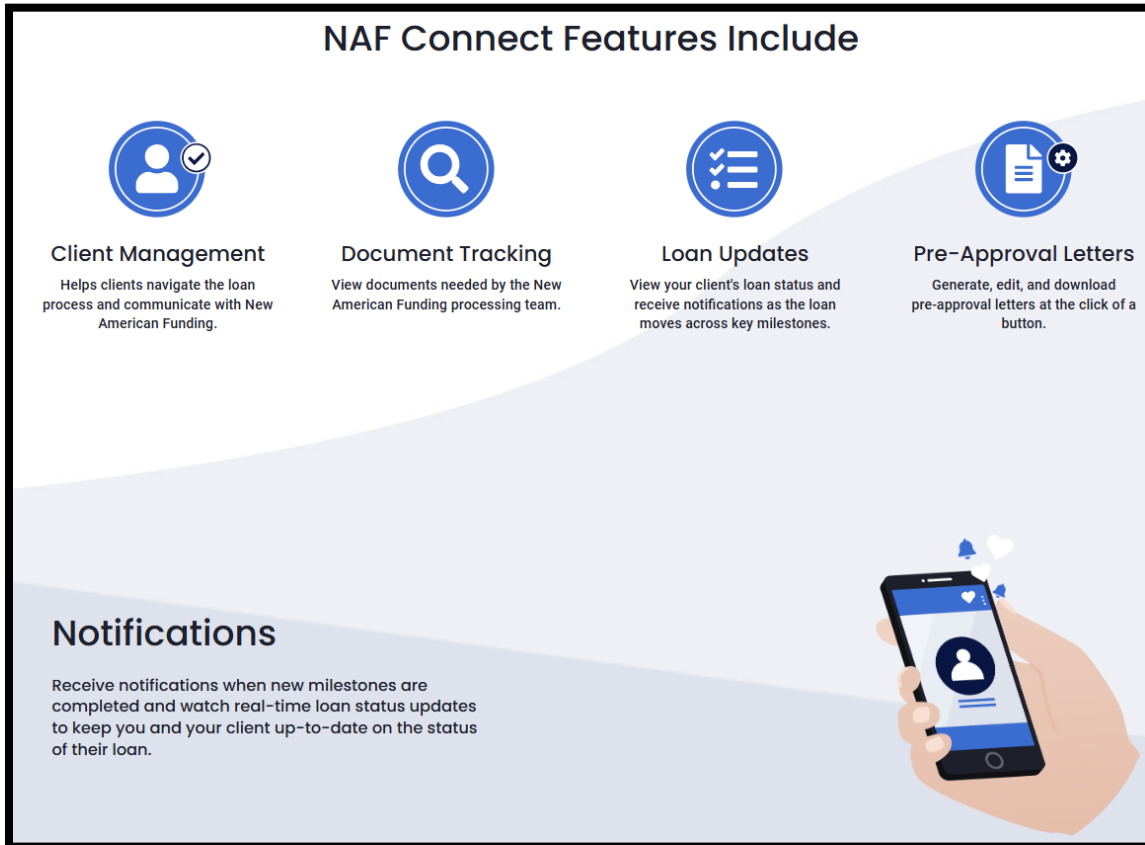
Figure 3 - NAF Connect Login Page 2 of 2

For a guided experience, schedule an appointment with the NAF Connect trainer at NAF Connect Training.

Dashboard

The **Dashboard** (Figure 4) displays once the user has successfully logged into the NAF Connect platform.

📋 **Note: Users without clients in any NAF products will see the Refer A Client button (Figure 5) instead of the Client List.**

The Client List displays an overview of each client. Selecting anywhere in a client row opens the Client Profile (see Client Profile). The Dashboard is comprised of the following features:

- Feature Spotlight
- Client List
- Refer a Client Button
- Feedback Button

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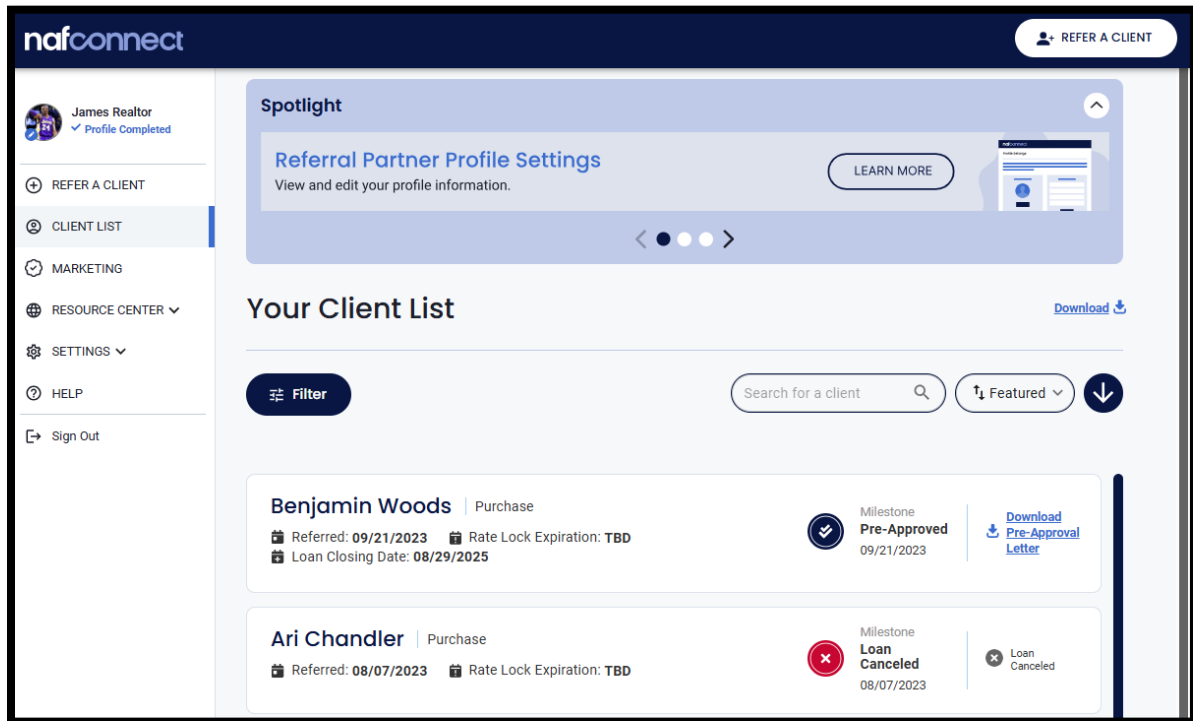
Figure 4 - NAF Connect Dashboard
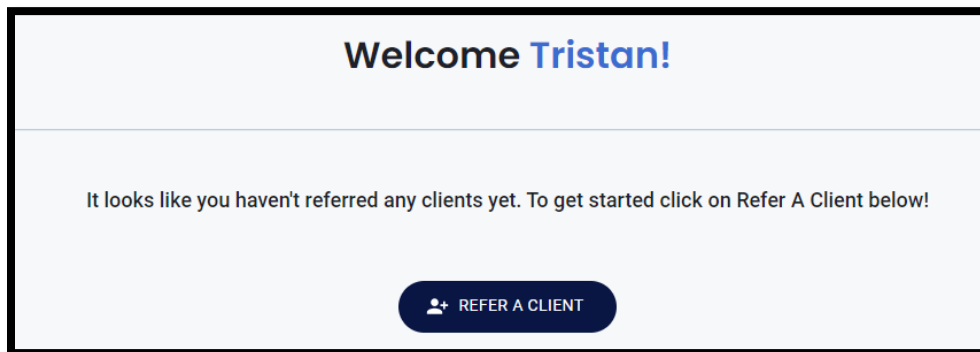
Figure 5 - Dashboard – No Clients

Feature Spotlight

The **Feature Spotlight** (Figure 6) displays a spotlight on a specific NAF Connect feature. The left and right arrows allow the user to scroll through different features (Figure 7). Selecting the **Learn More** button (Figure 6) opens the corresponding page in the Resource Center (see Resource Center). The Arrow icon at the top of the Spotlight collapses the panel (Figure 8).
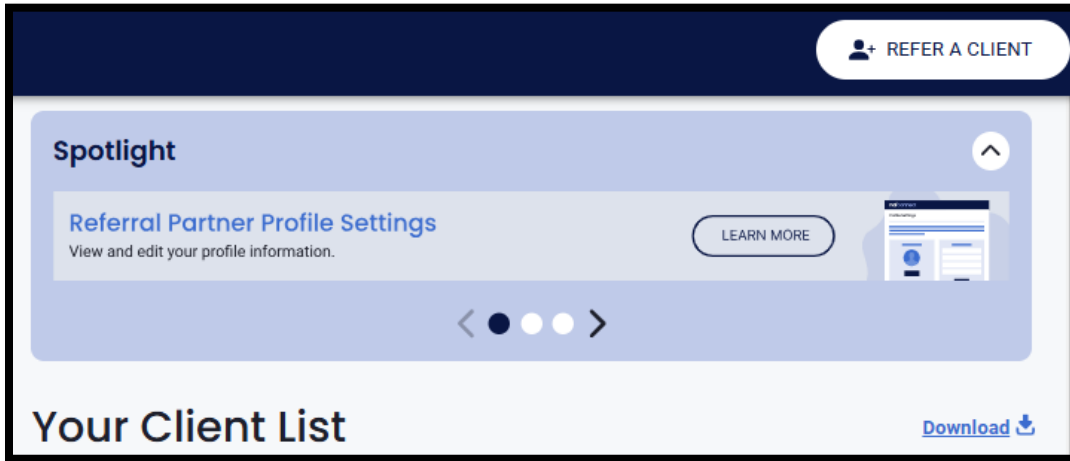
Figure 6 - Feature Spotlight – Expanded
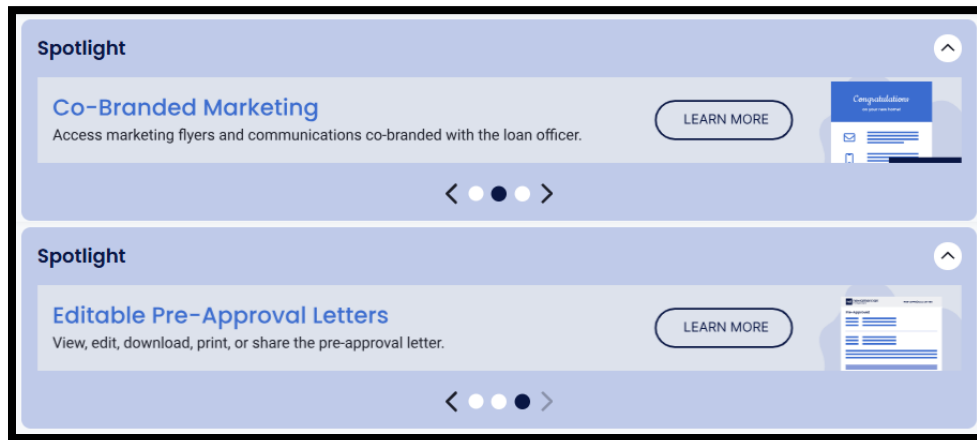
Figure 7 - Feature Spotlights - Co-Branded Marketing and Editable Pre-Approval Letters

Figure 8 - Feature Spotlight - Collapsed

Client List

The **Client List** (Figure 9) displays high-level client information. Selecting anywhere in a client row opens the **Client Profile** page (Client Profile). The following information is available in the Client List:

- Name
- Type of Loan
- Date of Referral
- Loan Closing Date
- Property address
- Loan Milestones
- Outstanding Conditions
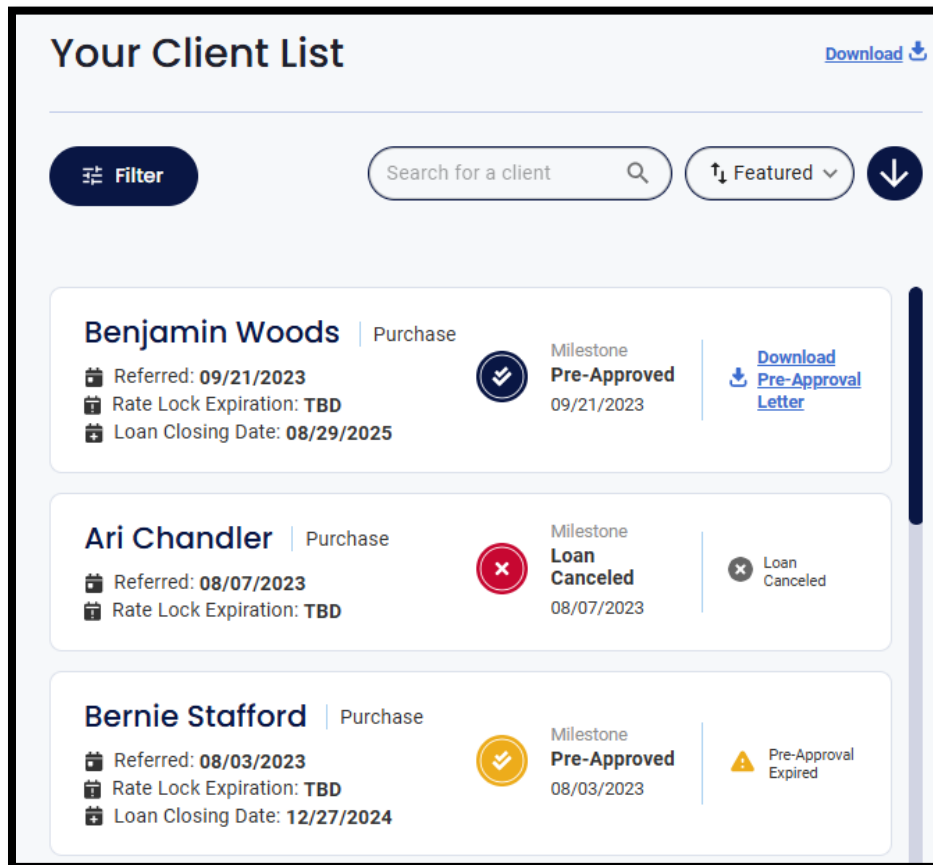
Figure 9 - Dashboard – Client List

Client List Filters

The **Client List Filters** (Figure 10) allow the user to filter the Client List to only display specific clients.
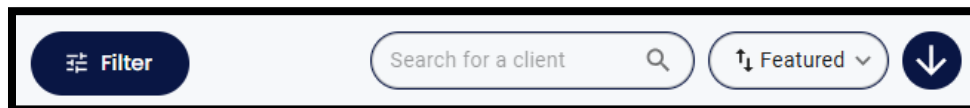
Figure 10 - Client List Filters

The Client List Filters include the following buttons:
- Filter Button
- Filters Search Bar
- Filters Drop-Down Menu and Order Button

Filter Button

Selecting the **Filter** button (Figure 10) opens a drop-down menu with loan milestone options. Users can select one or more milestones to filter the client list, displaying only clients at the selected milestones.
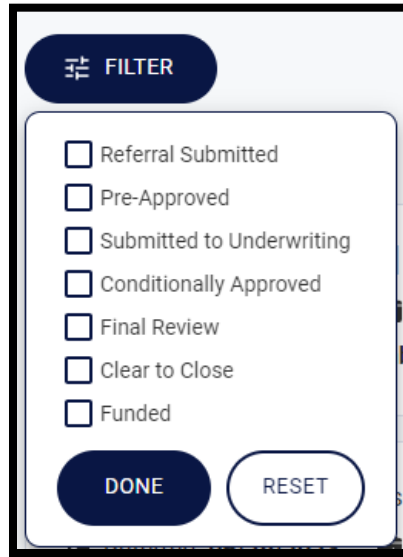
Figure 11 - Client List Filters – Filter Button

Selecting the **Done** button (Figure 11) will close the Filter drop-down menu. Selecting the **Reset** button will erase all set checkboxes.

Filters Search Bar

Entering a name in the Search bar (Figure 10) displays all clients that match the input (Figure 12).
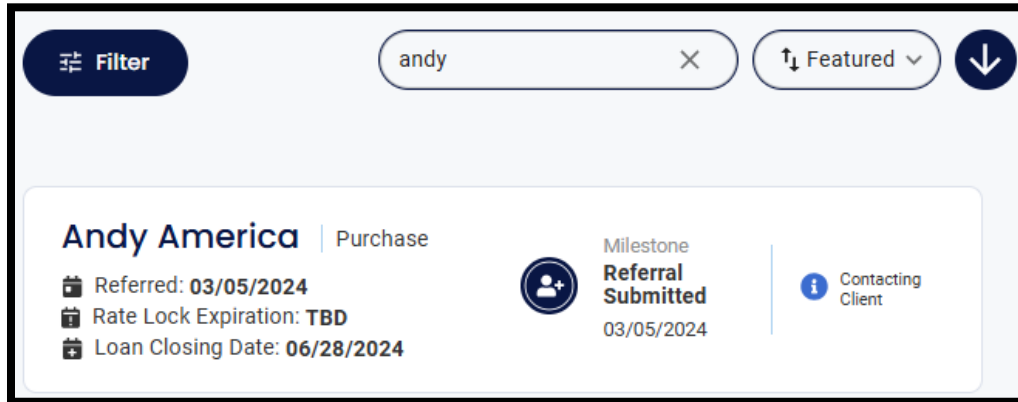
Figure 12 - Filters Search Bar – Typical

Filters Drop-Down Menu and Order Button

Selecting the **Filters** drop-down button (Figure 13) displays the **Filter** options menu. Selecting an option will reorder the Client List by the selected category (e.g., selecting the Client Name option will sort the Client List in alphabetical order).

The **Order** button displays the list in ascending or descending order and selecting the arrow button changes the direction.
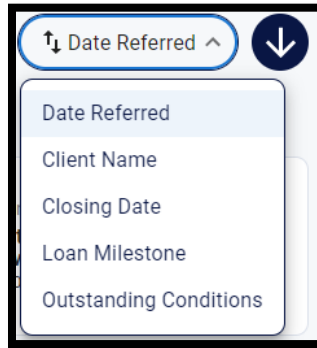
Figure 13 - Filters Drop-Down Menu and Order Button

Refer a Client Button

The **Refer a Client** button (Figure 14) is located at the top right corner of the Dashboard and opens the **Refer a Client** pop-up window (see Figure 15 and Referring a Client).

Figure 14 - Dashboard – Refer a Client Button

Figure 15 - Refer A Client Page

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Referring a Client

Perform the following steps to refer a client:

1. Select the **Refer A Client** button on the top right corner of the Dashboard (Figure 4). The **Refer a Client** page displays (Figure 16).

Figure 16 - Refer A Client Page

2. Enter or select the required information into the following textboxes (Figure 16):
   a. State of Transaction
   b. First Name
   c. Last Name
   d. Email Address
   e. Cell Phone

📋 **Note: The NAF Cash hyperlink opens a browser page explaining the NAF Cash program.**

   f. NAF Cash Program
      i. If the user selects the **Yes** button, then the Loan Officer (LO) assigned to the client receives a notification to check if the client would be able to use NAF Cash. A NAF Cash employee will reach out to the client to initiate the NAF Cash process.

3. Select a Loan Officer by using one of the following options (Figure 17):

Figure 17 - Select A Loan Officer – Refer A Client Page – Typical

    a. Select the **Select A Preferred Loan Officer** radio button (Figure 17).
        i. Select the radio button next to the desired Loan Officer (see Adding a Preferred Loan Officer).
    b. Select the **Search for a Loan Officer by Name or NMLS ID** radio button (Figure 17).
        i. Enter the name or NMLS ID of the desired Loan Officer into the search bar (Figure 18).
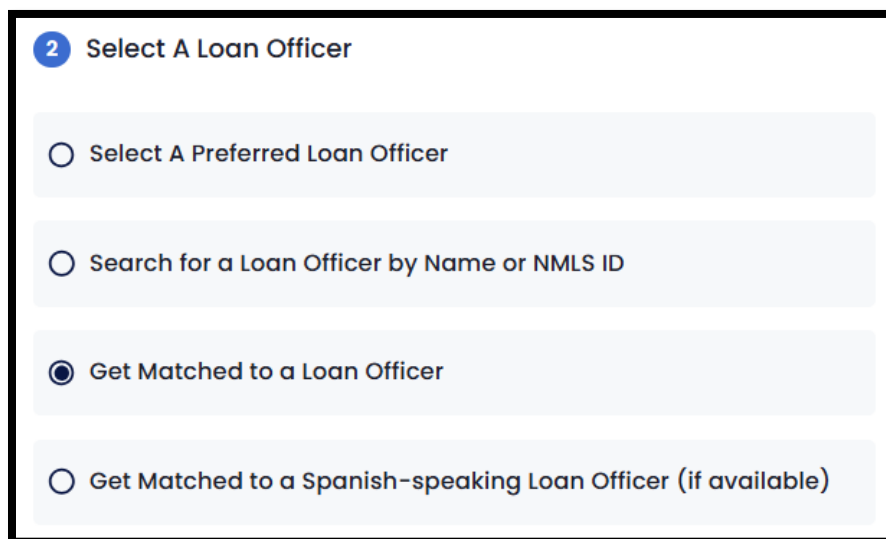
Figure 18 - Search for a Loan Officer – Typical

    ii. Select the desired Loan Officer (Figure 18).
   c. Select the **Get Matched to a Loan Officer** radio button (Figure 19).

Figure 19 - Get Matched to a Loan Officer Radio Button

   d. Select the **Get Matched to a Spanish-speaking Loan Officer (if available)** radio button (Figure 20).

Figure 20 - Get Matched to a Spanish-speaking Loan Officer Radio Button

4. Enter any additional information, if required (Figure 21).

Figure 21 - Enter Additional Information Buttons and Fields

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a. Select the appropriate **Contact** and **Additional Preferences option**, if required (Figure 21).
b. Enter a note into the **Additional Notes** field if appropriate (Figure 21).

5. Select the **Submit Referral** button (Figure 21). The **Successfully Referred** toast message (Figure 22) displays.

Figure 22 - Successfully Referred Toast Message − Typical

When the Success notification displays (Figure 22), the following emails are sent:
- An email to the user confirming the referral submission (Figure 23)
- An email to the referred LO confirming the new client (Figure 24)
- An email to the referral to begin the application:
  - With a known LO (Figure 25)
  - With a compatible LO (Figure 26)
- An NAF Cash confirmation email to users who answered **Yes** to NAF Cash (Figure 27)
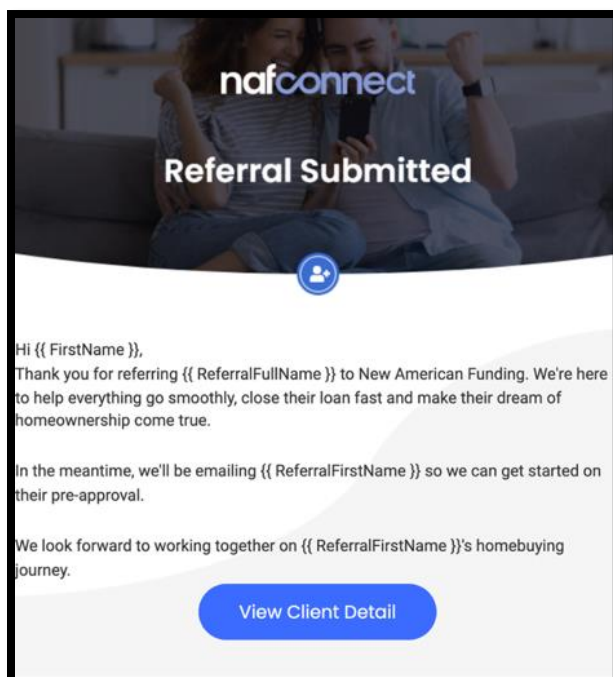
Figure 23 - User Notification Email − Referral Submitted
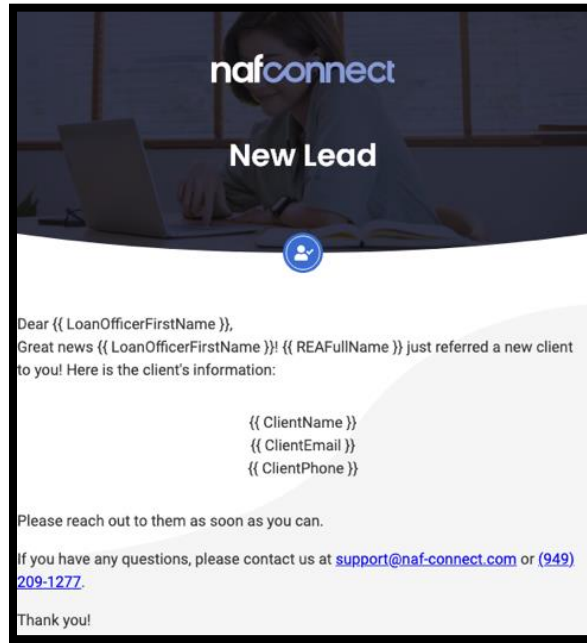
Figure 24 - Loan Officer Notification Email – New Lead
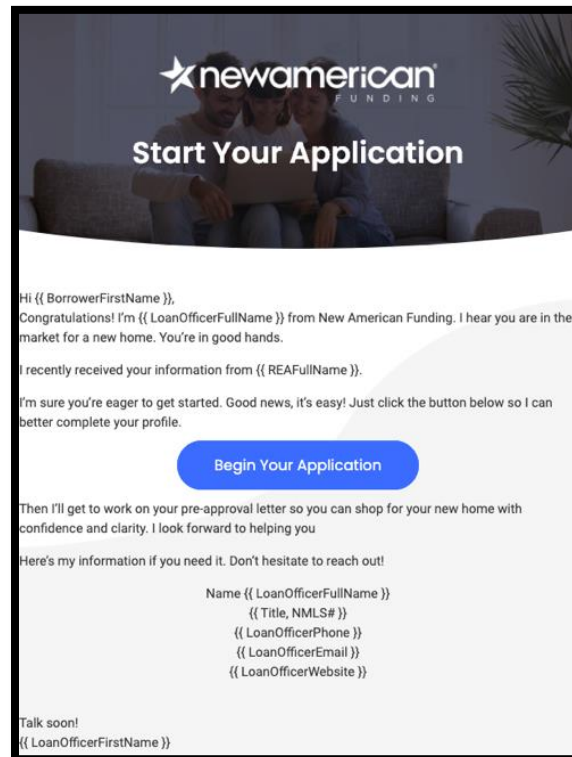
Figure 25 - Borrower Notification Email – Known Loan Officer
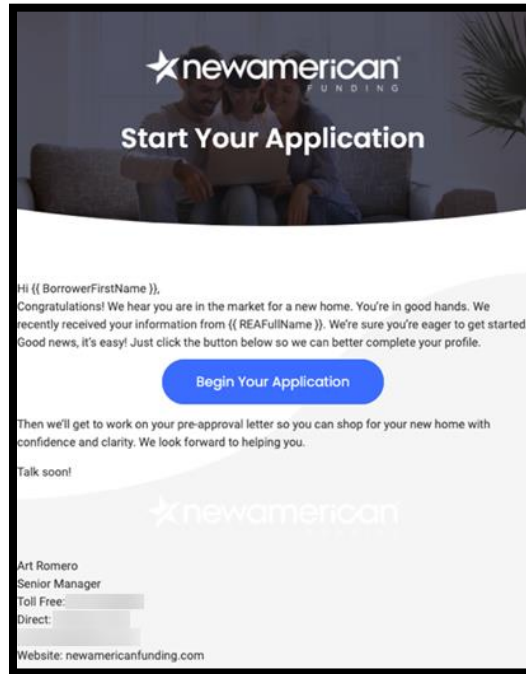
Figure 26 - Borrower Notification Email – Compatible Loan Officer
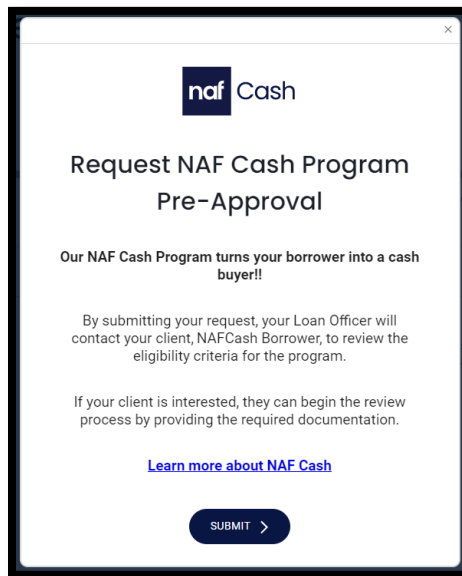
Figure 27 - NAF Cash Confirmation Email

Feedback Button

The **Feedback** button located on the right side of the screen (Figure 28) opens the Feedback pop-up (Figure 29). This pop-up allows users to send their feedback and ideas to the creators of NAF Connect.

Figure 28 - Feedback Button

Figure 29 - Feedback Pop-up

Navigation Menu

The Navigation Menu (Figure 30) is located on the left side of all pages in the NAF Connect platform. Selecting the following menu buttons allows the user to navigate through NAF Connect:

- Refer a Client
- Username and Image
- Profile Indicator
- Clients Button
- Settings Drop-Down List
- Help Button
- Sign Out Button
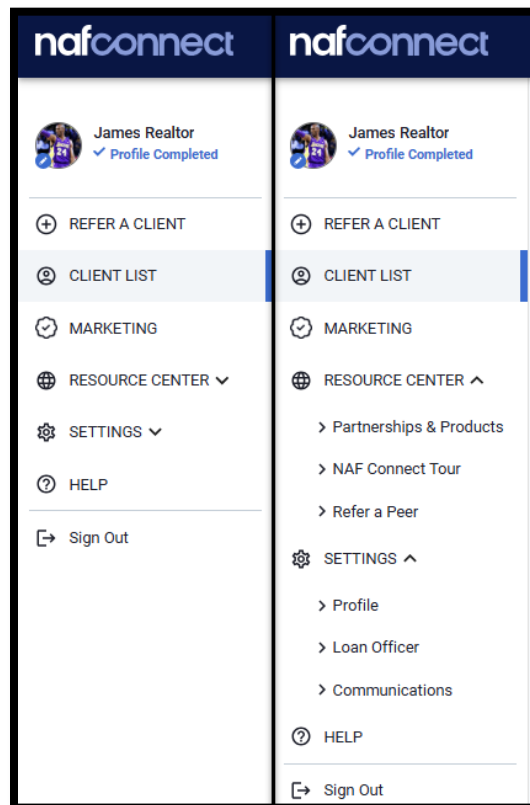
Figure 30 - Navigation Menu Collapsed (Left) and Extended (Right)

The Navigation Menu does not display by default on mobile devices and in small desktop windows. The hamburger menu button located on the left side of the platform (Figure 31) opens the Navigation Menu. The X button (Figure 32) closes the menu. The Navigation Menu on mobile devices includes the **Refer a Client** button (see Referring a Client) and **Feedback** button at the bottom of the page (Figure 33).
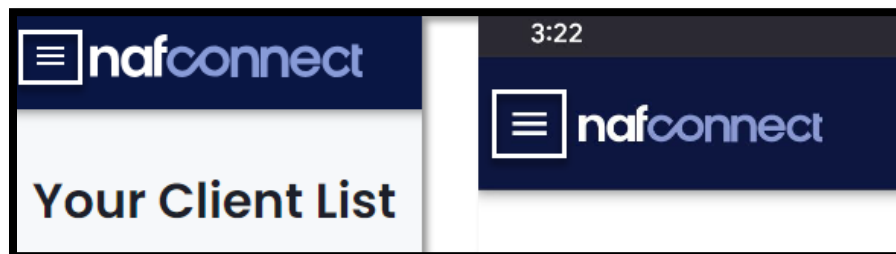
Figure 31 - Navigation Menu Hamburger Button – Desktop (Left), Mobile (Right)
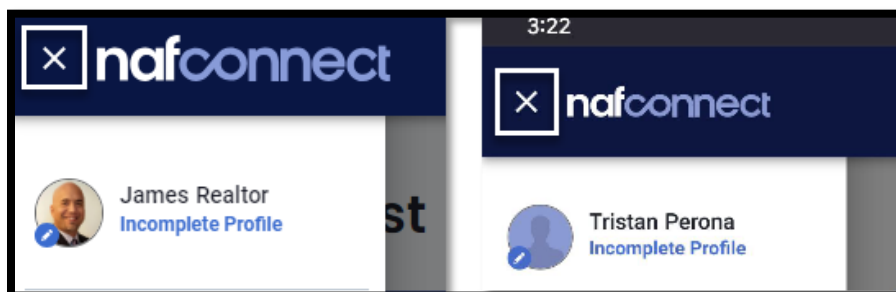
Figure 32 - Navigation X Button – Desktop (Left), Mobile (Right)

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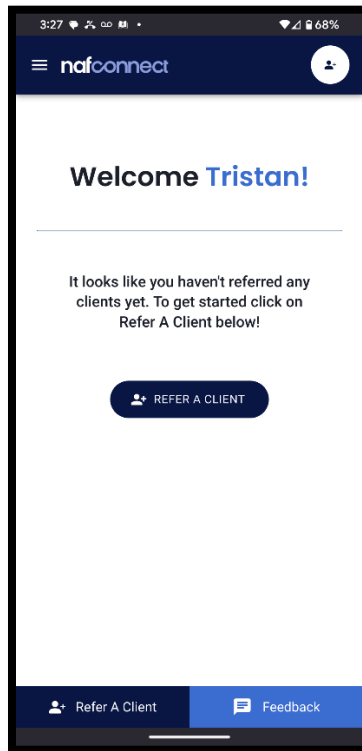
Figure 33 - Mobile Navigation Menu – Typical

Refer a Client Navigation Button

The **Refer a Client** button (Figure 30) is located on the left side of the Dashboard and opens the Refer a Client page (see Referring a Client).

Username and Image

The username and profile image (Figure 30) displays on the top left of the Dashboard above the Navigation Menu. Selecting the username or image opens the **Profile Settings** page (see Profile Settings).

Profile Indicator

The **Profile Indicator** (Figure 34) appears below the username in the Navigation Menu and shows the status of the user's profile. The indicator has two states:

- Incomplete Profile (Figure 34): Displays when the NAF Connect account does not contain Real Estate License, Mailing Address, and Company Information. The **Incomplete Profile Reminder** pop-up (Figure 35) displays for users with incomplete profiles on login.
- Profile Completed (Figure 34): Displays when the user has completed their profile information.
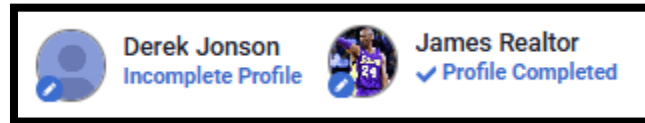
Figure 34 - Profile Indicators
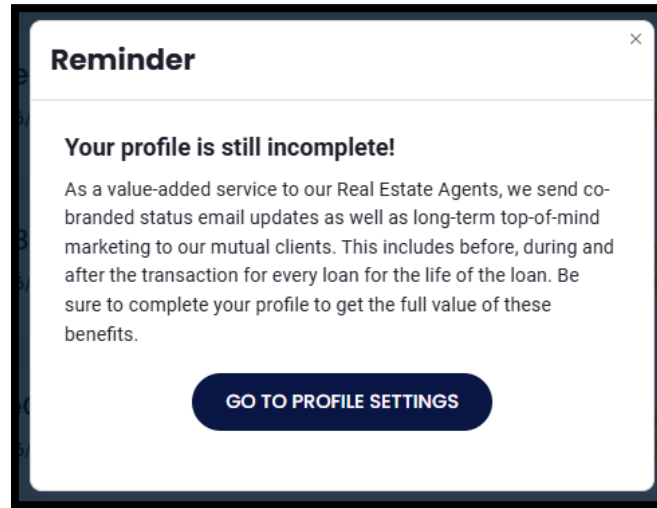
Figure 35 - Reminder for Incomplete Profile

The Profile Indicator displays **Profile Completed** for users with a completed profile (Figure 30).

Clients Button

The **Clients** button (Figure 30) in the Navigation menu opens the Client List (see Dashboard), where users can view and manage all their referred clients. Users can access individual client profiles, track loan milestones, and apply filters or search to quickly locate specific clients from the Client List.

Marketing Button

The **Marketing** button (Figure 30) in the Navigation menu opens the Marketing Collateral section (see Marketing Collateral Page). This section provides access to marketing assets such as brochures, flyers, and branded templates.

Settings Drop-Down List

The **Settings** drop-down list (Figure 30) in the Navigation menu allows users to select the following settings:
- Profile Settings
- Loan Officer Settings
- Communications Settings
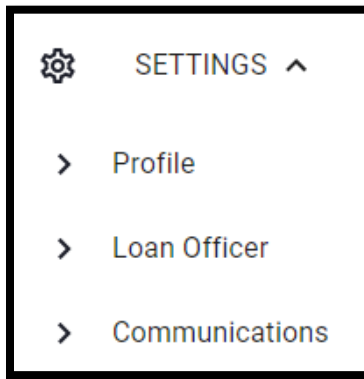
Figure 36 - Settings – Drop-Down Menu

Help Button

The **Help** button (Figure 30) in the Navigation menu opens the **Help** page (see Help Page). This page provides access to FAQs, user manuals, troubleshooting guides, and support contact information to assist users with any questions or issues.

Marketing Collateral Page

📋 **Note: Users must enter profile information to use the Marketing Collateral feature (see Profile Settings).**

Selecting the Marketing button in the Navigation menu (Figure 30) opens the Marketing Collateral page. The **Marketing Collateral** page (Figure 37) allows users to create NAF co-branded marketing material with the user contact information available at the bottom of the images. NAF Connect users typically use these marketing materials in emails, printed filters, and other digital platforms to market real estate services to potential customers. Marketing materials are sorted alphabetically.

Favorited materials appear at the top of the list. The **Favorite** button (heart icon) allows the user to mark material as favorites or remove them from their favorites . Selecting a marketing material style opens the Marketing Collateral Creation Screen (see Marketing Collateral Creation Screen).
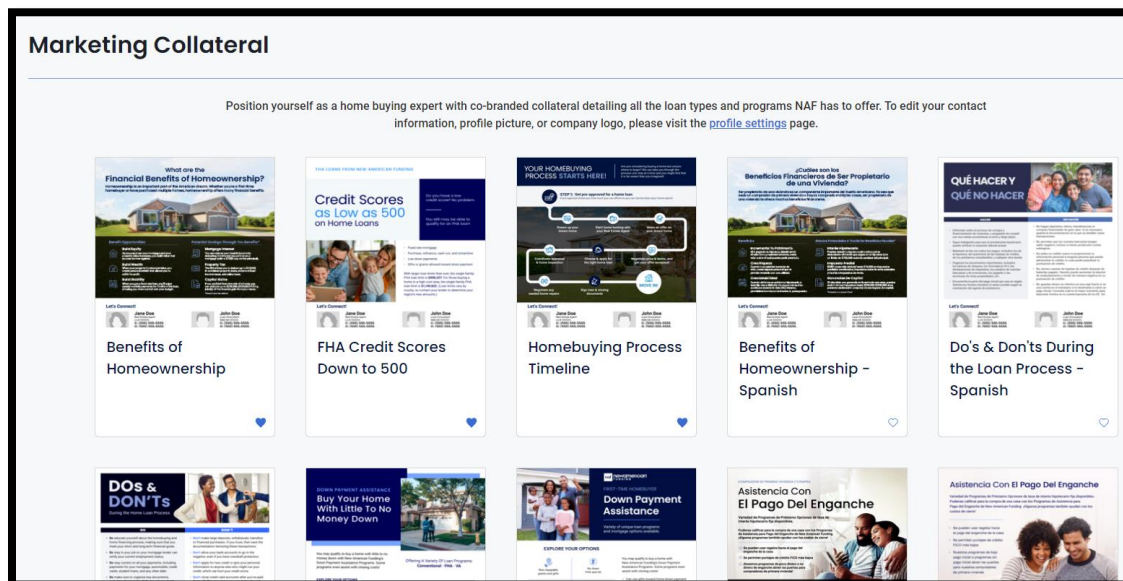
Figure 37 - Marketing Collateral – Typical

Marketing Collateral Creation Screen

The **Marketing Collateral Creation** screen (Figure 38) allows users to create co-branded marketing materials using existing NAF templates that include user contact information at the bottom of the images. The PDF Preview located on the left side of the screen displays the collateral. The **Back to Marketing Collateral** button (Figure 38) at the top of the screen allows users to return to the last page to select a different marketing material to generate. The user must enter the following information to create marketing collateral:

- State
- Their contact information in Profile Settings (see Profile Settings)
- A loan officer licensed in the appropriate state

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Figure 38 - Marketing Collateral Creation Screen – Typical

📋 **Note: Personal images, company logos, and contact information are imported from the user profile settings.**

Images are co-branded using the following contact information of both the user and the loan officer the user selects:
- Name
- NAF Connect Profile Image
- License Number
- Phone numbers
- Email
- Company Logo

The **Download** button (Figure 38) opens a browser pop-up with a PDF of the marketing material. Users without a completed profile cannot download marketing materials, and a warning message (Figure 39) displays under the Download button instead of the Co-Branding Agreement message.
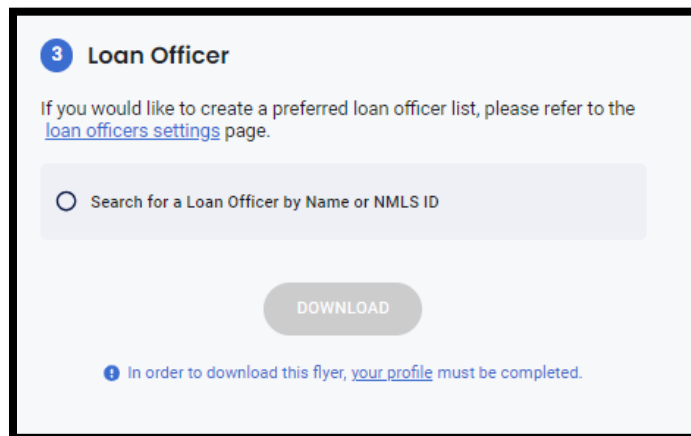
Figure 39 - Incomplete Profile Warning Message

Co-Branding Agreement

The Co-Branding Agreement button (Figure 38) opens a new tab to the **NAF Connect Co-Branding Agreement** (Figure 40). The Co-Branding Agreement outlines the compliance requirements for downloading and using NAF Connect co-branded materials.

Figure 40 - Co-Branding Agreement – 9-6-23

Creating Marketing Materials

📋 **Note: The user profile must be completed to create and download marketing materials (see Profile Settings).**

Perform the following steps to create marketing materials:
1. Select the **Marketing** button in the Navigation menu (Figure 41). The Marketing Collateral Screen displays (Figure 38).
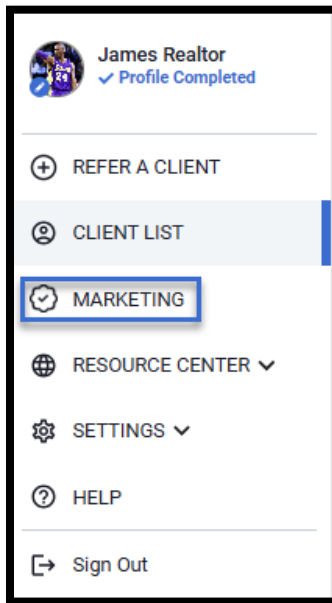
Figure 41 - Marketing Button – Navigation Menu

2. Select the desired marketing material (Figure 38). The Marketing Collateral Creation screen displays (Figure 42).
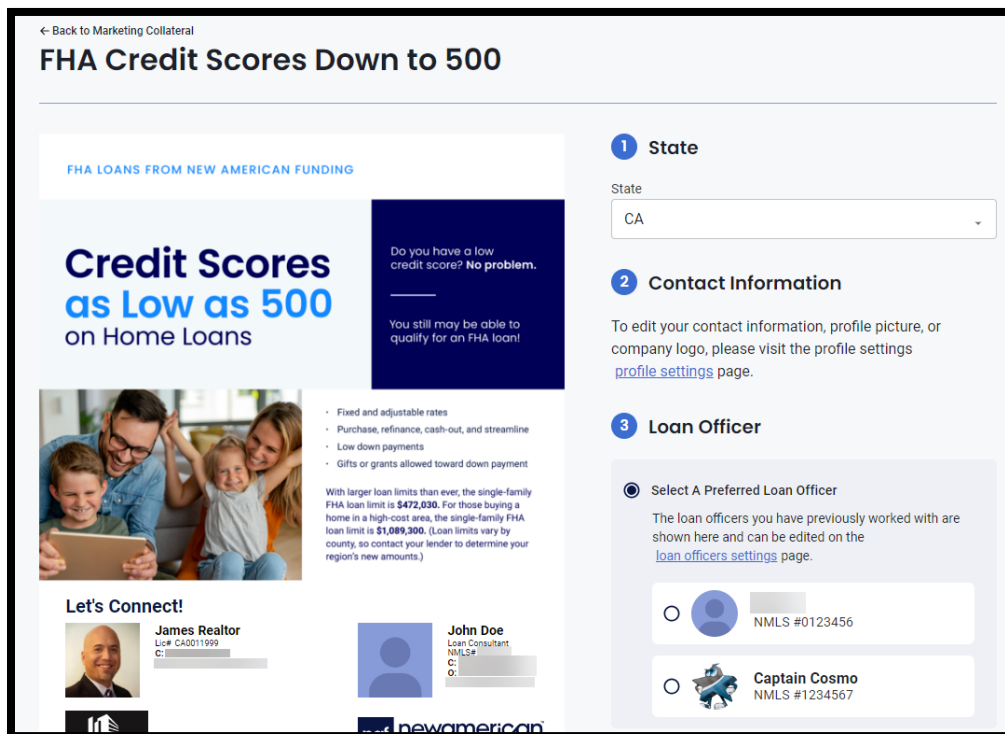
Figure 42 - Marketing Collateral Creation Screen – Typical

3. Select the State field (Figure 42). The State drop-down menu displays (Figure 43).
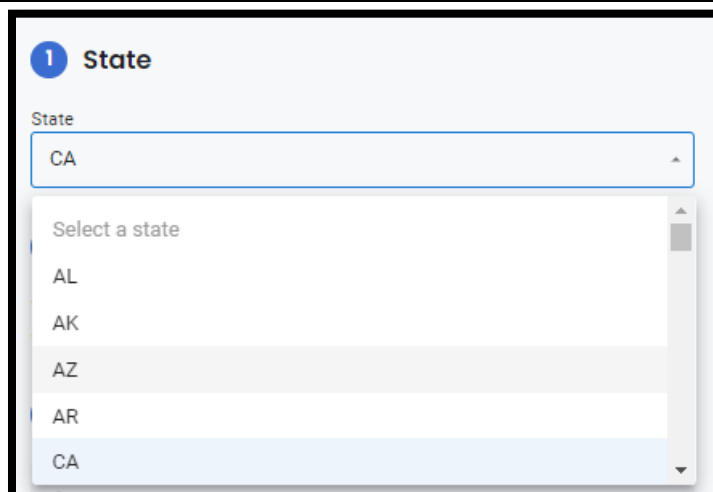
Figure 43 - State Drop-Down Menu

4. Select the appropriate state (Figure 43).
5. Perform one of the following steps to select a loan officer:
   a. Select a preferred loan officer (Figure 44).

Figure 44 - Select A Preferred Loan Officer – Typical

   b. Select the **Search for a Loan Officer by Name or NMLS ID** radio button (Figure 45). The Loan Officer Search bar displays (Figure 46).
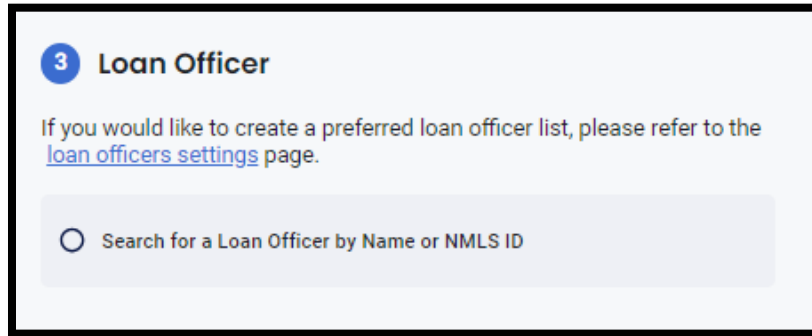
Figure 45 - Search for A Loan Officer By Name Or NMLS ID Button
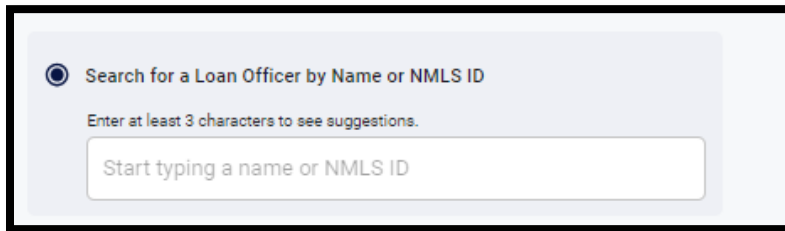
Figure 46 - Loan Officer Search Bar

    i. Enter the name of the appropriate LO into the Search bar. The Search Options display (Figure 47).
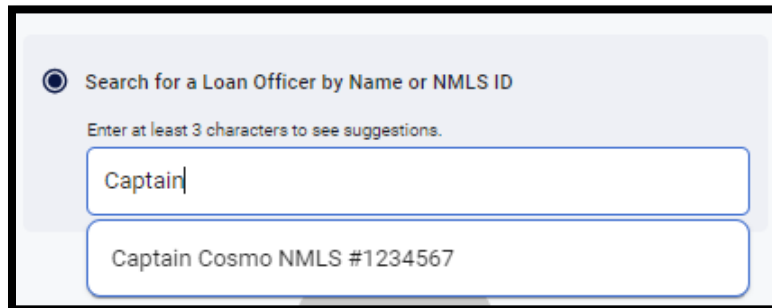
Figure 47 - Loan Officer Search Options – Typical

    ii. Select the appropriate LO (Figure 47).

6. Select the **Download** button (Figure 48). A browser pop-up displays with the marketing material PDF (Figure 49).
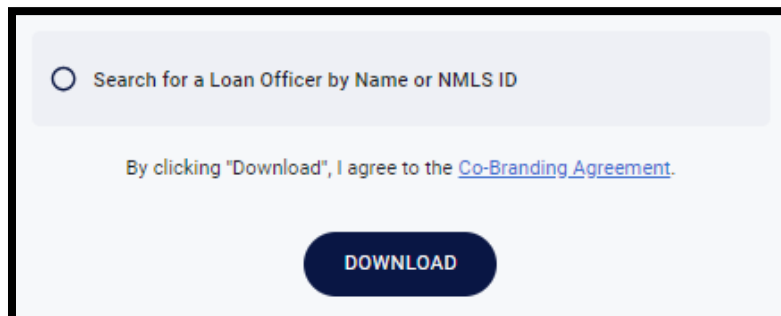
Figure 48 - Download Button – Typical
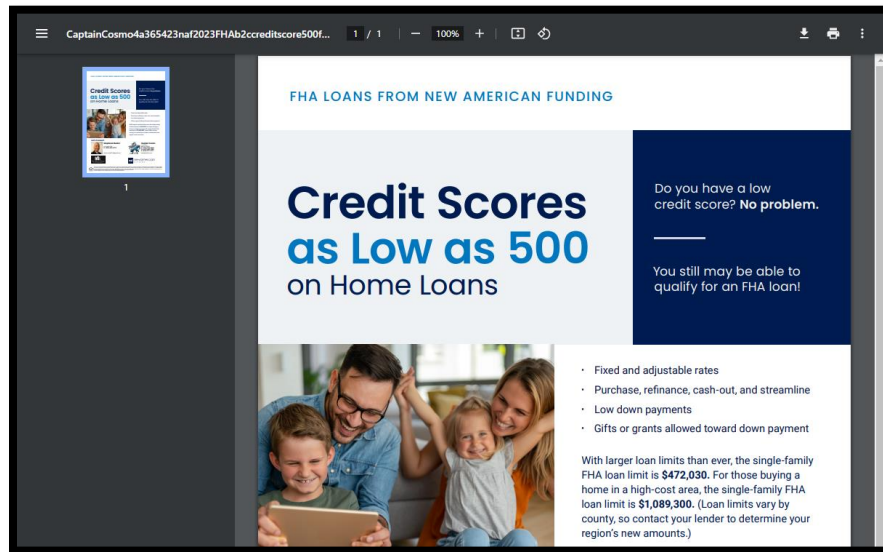
Figure 49 - Browser PDF Reader – Typical

📋 **Note: Users with pop-up blockers must open the pop-up using browser specific options**.

7. Select the **Download** button (Figure 49).

Resource Center

The **Resource Center** section (Figure 50) in the Navigation menu educates users about available NAF business opportunities and the NAF Connect platform. The following pages are available in the Resource Center section:

- Partnerships and Products Page
- NAF Connect Tour
- Refer a Peer Page
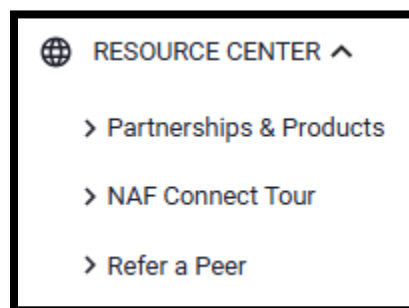
Figure 50 - Resource Center Section

Partnerships and Products Page

The **Partnerships & Products** page (Figure 51) educates users on NAF resources that REAs use to secure borrowers. Hovering over a resource card displays a brief description of the resource (Figure 52). Selecting a card opens the following pages:

- NAF Cash Page
- Co-Branding Page
- We're Local Page
- NAF Pathway Page
- NAF Concierge Page
- NAF Insurance Page
- UQUAL Page
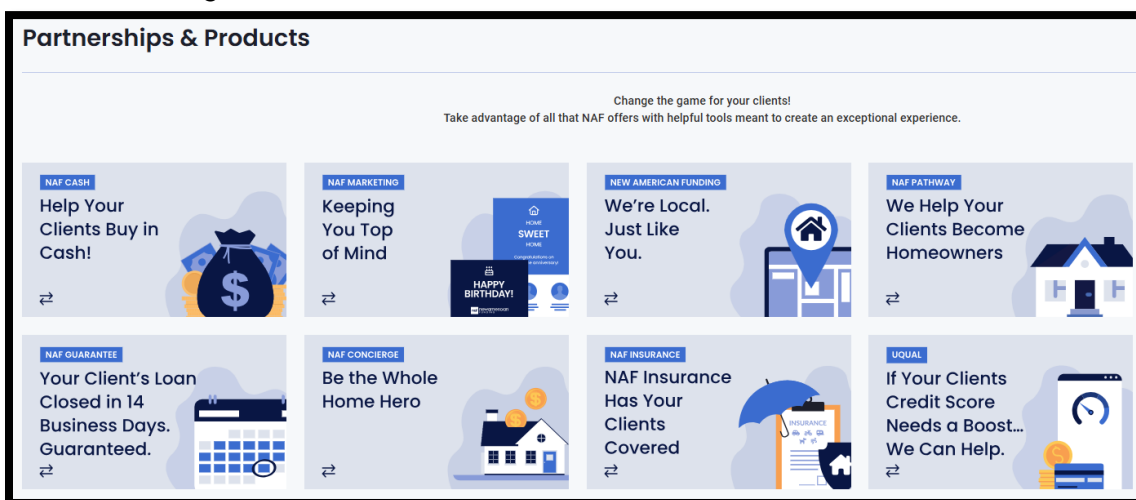
Figure 51 - Resource Center
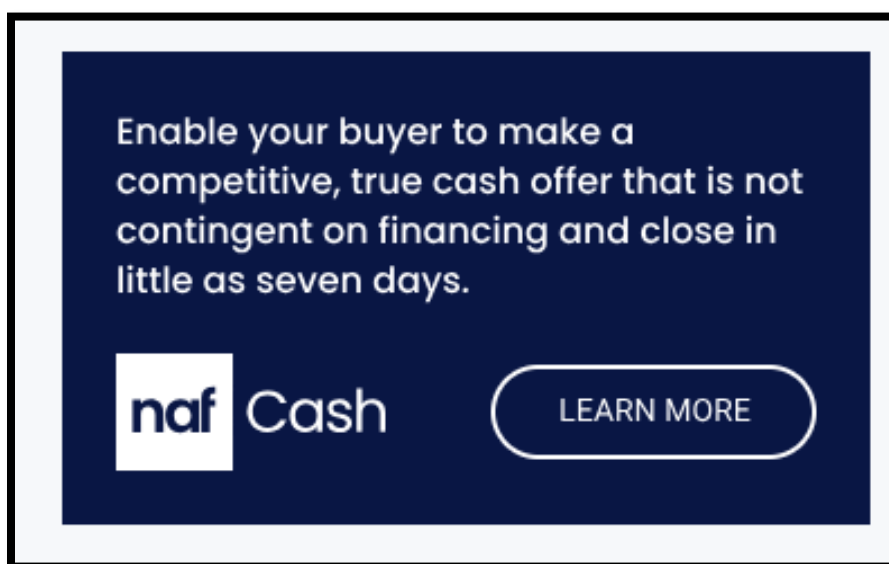
Figure 52 - Resource Center Hover Cards – Typical

NAF Cash Page

The **NAF Cash** page (Figure 53) displays a description, legal information, and important links for REAs interested in using the NAF Cash program with their borrowers. The **View Openings** button (Figure 53) opens the [NAF Cash training Calendly site](link).
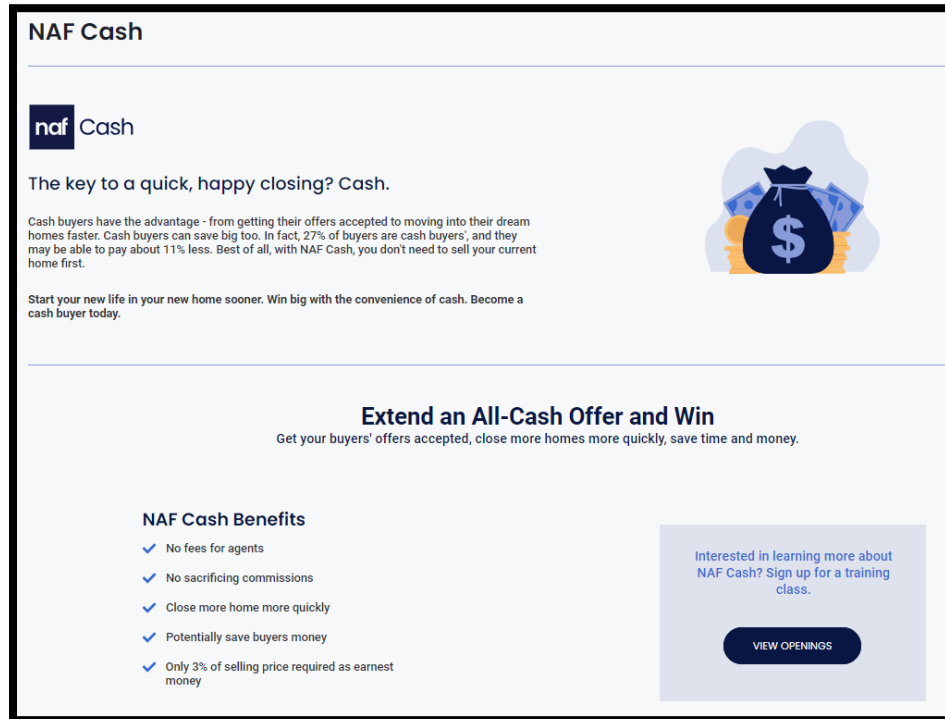
Figure 53 - NAF Cash Page

Co-Branding Page

The **Co-Branding** page (Figure 54) displays a description of NAF co-branding options for REAs.
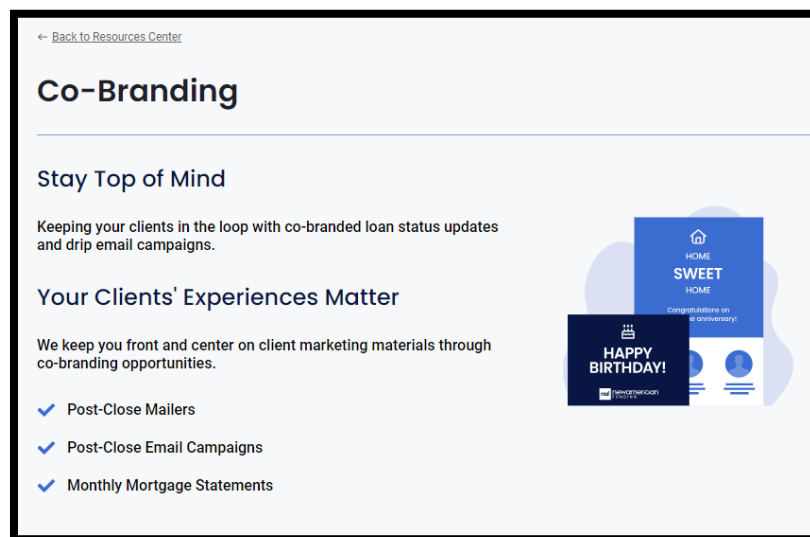
Figure 54 - Co-Branding Page

We're Local Page

The **We're Local** page (Figure 55) highlights how NAF branches serve clients nationwide and provides contact information for preferred loan officers for further inquiries.
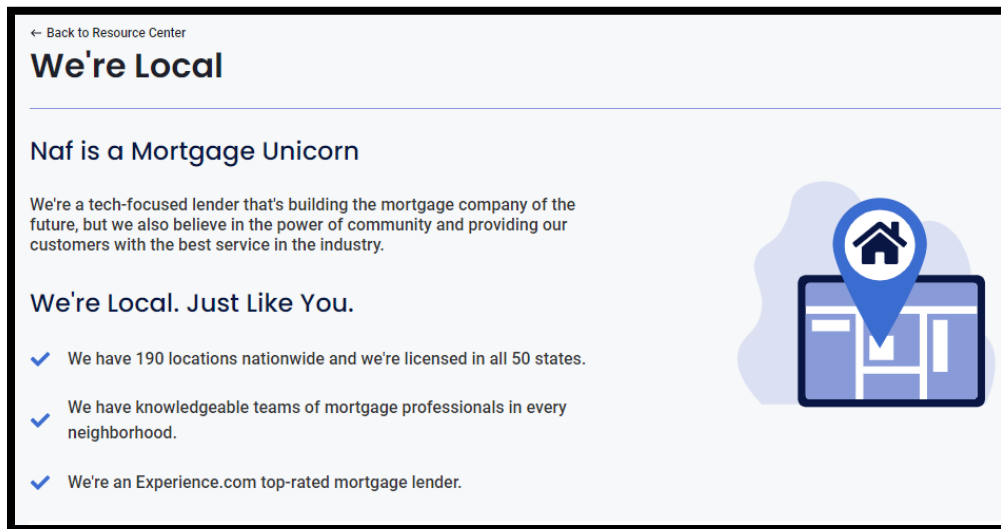
Figure 55 - We're Local Page

NAF Pathway Page

The **NAF Pathway** page (Figure 56) provides an overview of the NAF Pathway program and includes contact information for preferred loan officers for additional inquiries.
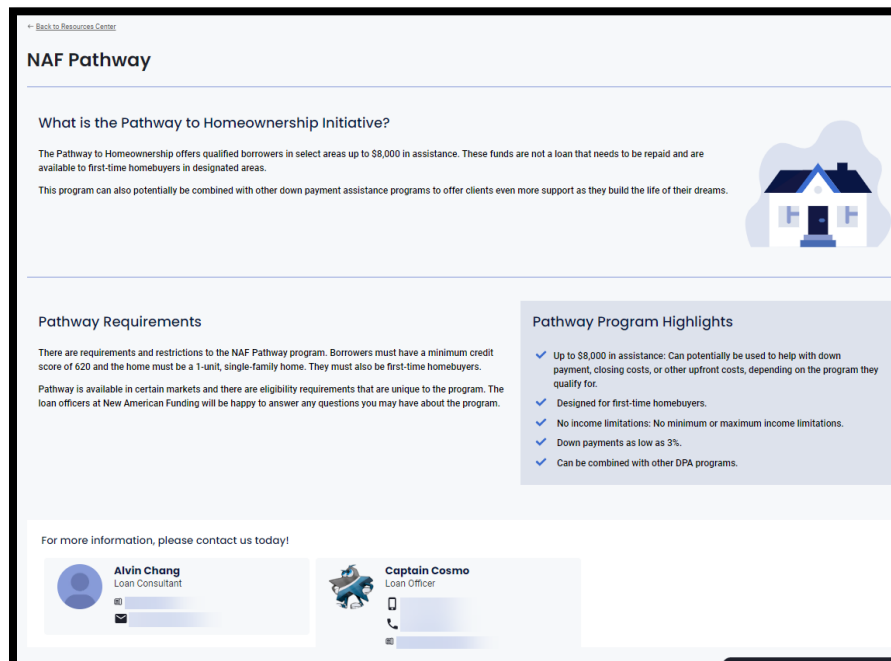
Figure 56 - NAF Pathway Page

14-Day Close Guarantee Page

The **14-Day Close Guarantee** page (Figure 57) displays a description and benefits of the guarantee that NAF delivers borrower loans within 14 business days.
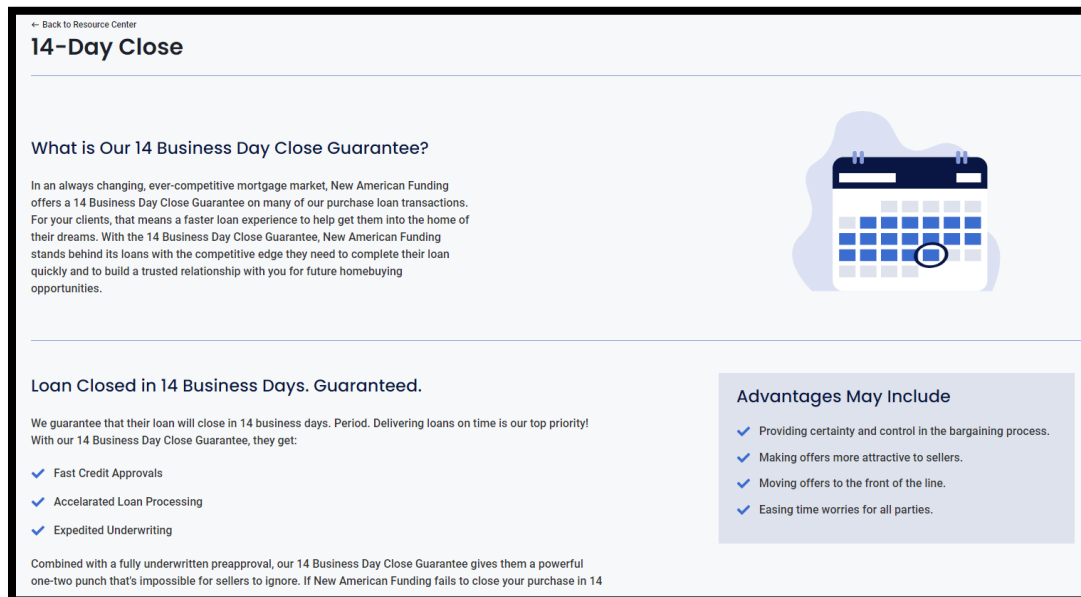
Figure 57 - NAF 14-Day Close Guarantee Page

NAF Concierge Page

The **NAF Concierge** page (Figure 58) provides an overview of the NAF Concierge moving program and includes contact information for preferred loan officers for further assistance.
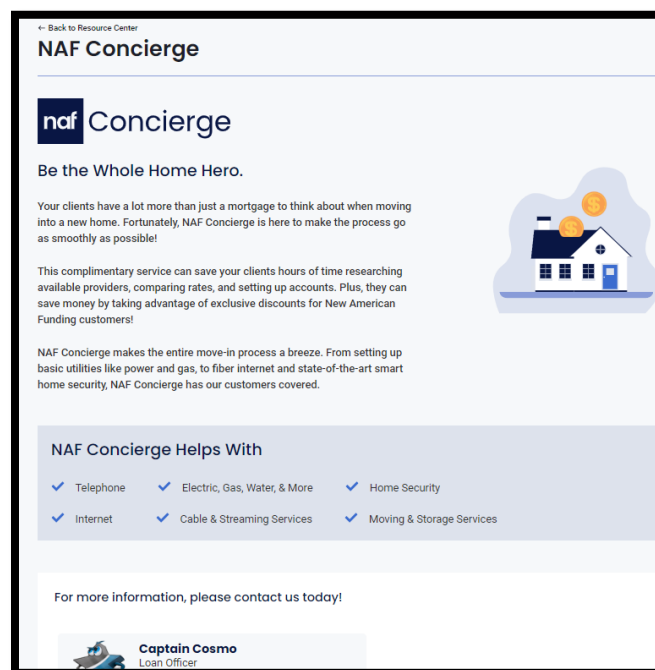
Figure 58 - NAF Concierge Resource Page

NAF Insurance Page

The **NAF Insurance** page (Figure 59) provides an overview of the NAF Insurance program and includes contact details for preferred loan officers for additional information.
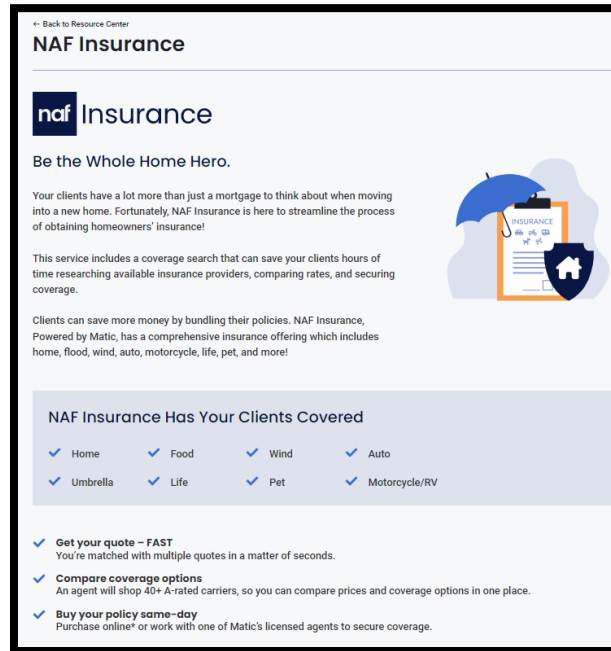
Figure 59 - NAF Insurance Resource Page

UQUAL Page

The UQUAL page (Figure 60) displays a description of the UQUAL program and the contact information of preferred loan officers to request more information.
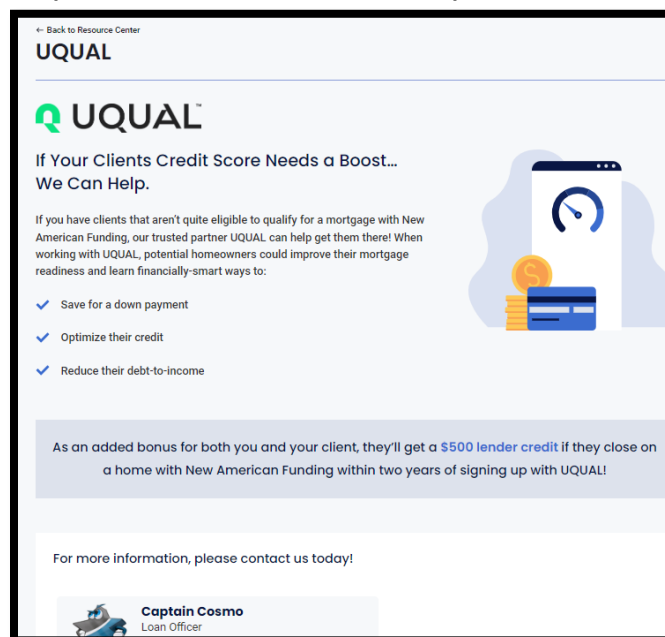
Figure 60 - UQUAL Resource Page

NAF Connect Tour

The NAF Connect Tour (Figure 61) educates users on how to use the NAF Connect platform. Selecting a feature card opens the following pages:

- Referral Partner Profile Settings Page
- Co-Branded Marketing Page
- Editable Pre-Approval Letters Page
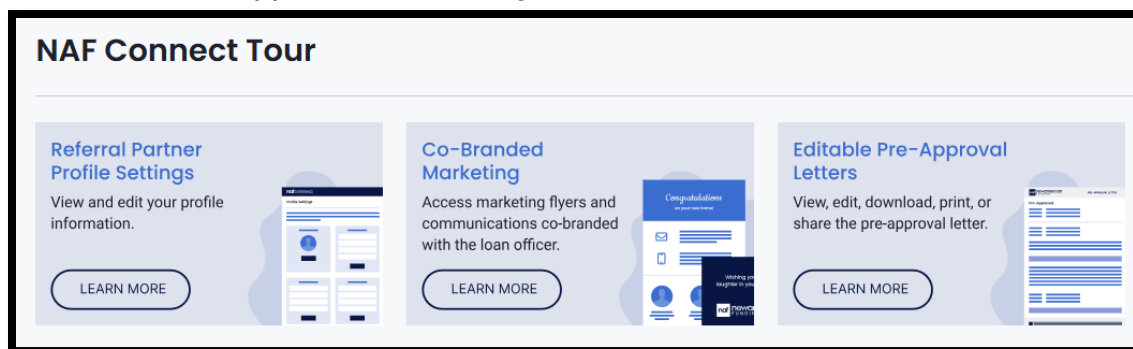
Figure 61 - NAF Connect Tour – Typical

Referral Partner Profile Settings Page

The **Referral Partner Profile Settings** page (Figure 62) educates users on how NAF Connect uses realtor information to create marketing materials.
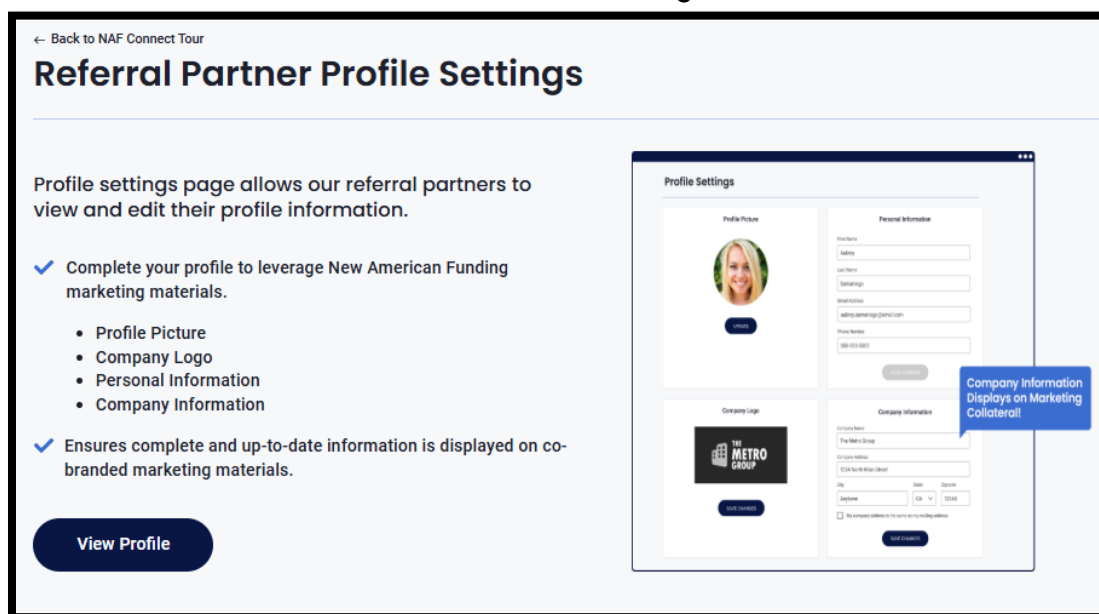
Figure 62 - Referral Partner Profile Settings

Co-Branded Marketing Page

The **Co-Branded Marketing** page (Figure 63) educates users on how to create and use co-branded marketing from NAF Connect.
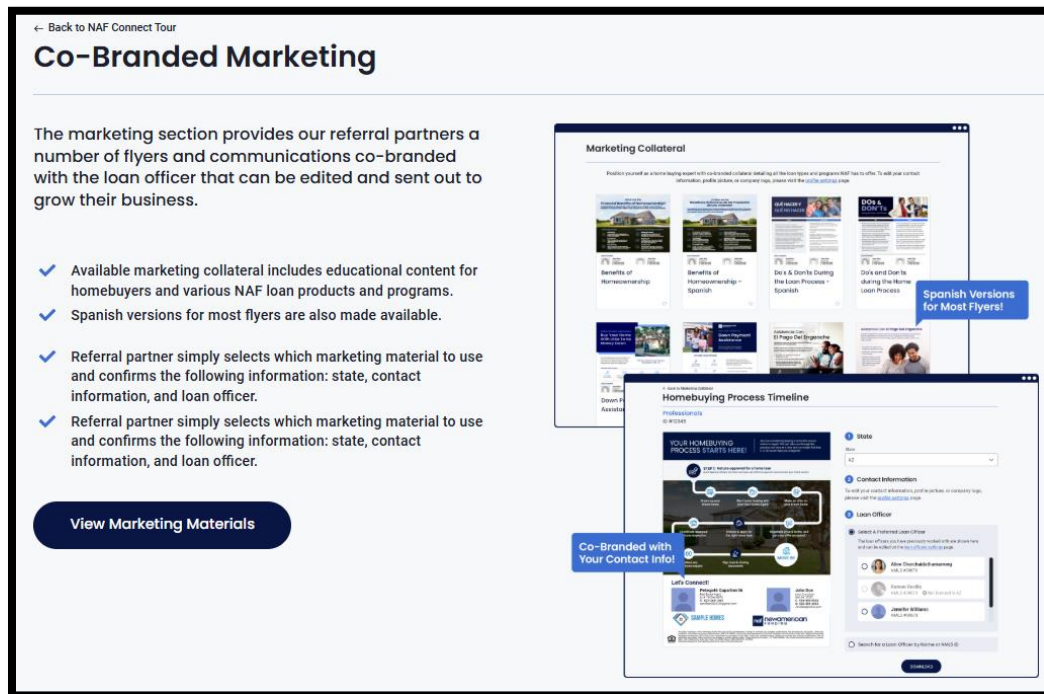
Figure 63 - Co-Branded Marketing Page

Editable Pre-Approval Letters Page

The **Editable Pre-Approval Letters** page (Figure 64) educates users on how to use and edit pre-approval letters within the platform (see Pre-Approved Milestone).
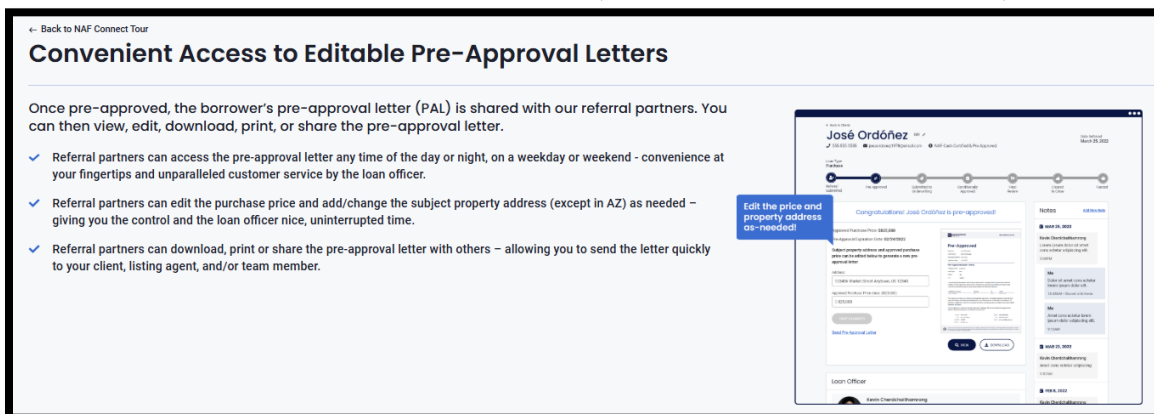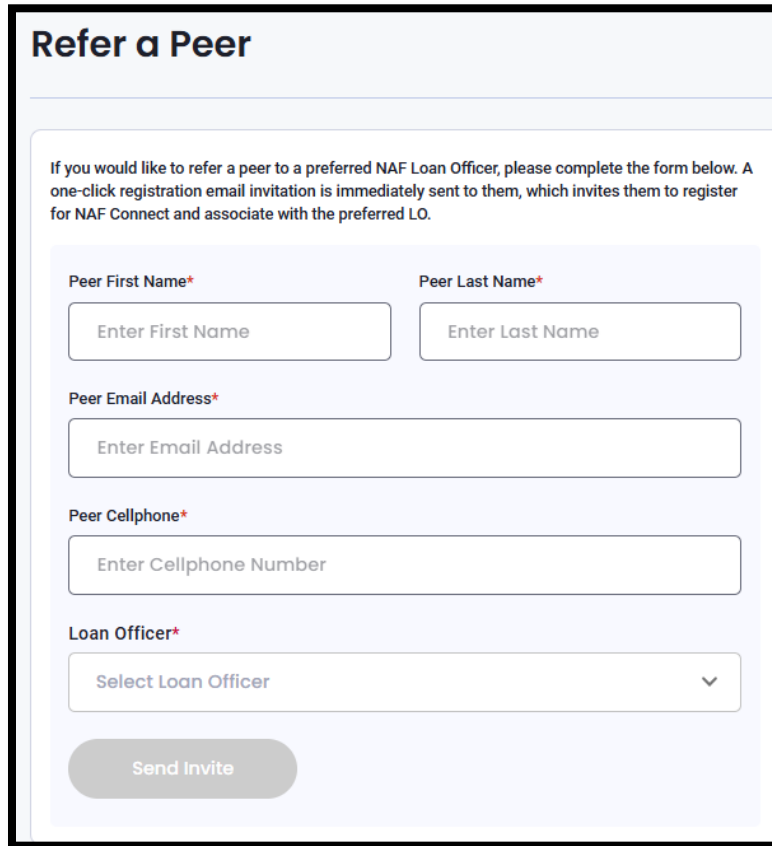
Figure 64 - Editable Pre-Approval Letters Page

Refer a Peer Page

Selecting the **Refer a Peer** button in the Navigation menu (Figure 30) opens the **Refer a Peer** page (Figure 65). This page allows users to refer peers in their industry to a preferred loan officer (e.g., REAs or builders who want to work with NAF), and the platform sends them an email invitation to create an account.

Refer a Peer

If you would like to refer a peer to a preferred NAF Loan Officer, please complete the form below. A one-click registration email invitation is immediately sent to them, which invites them to register for NAF Connect and associate with the preferred LO.

Peer First Name*   Peer Last Name*

Enter First Name   Enter Last Name

Peer Email Address*

Enter Email Address

Peer Cellphone*

Enter Cellphone Number

Loan Officer*

Select Loan Officer

Send Invite

Figure 65 - Refer a Peer Page

Referring a Peer

Perform the following steps to refer a peer:

1. Select the **Refer a Peer** button in the Navigation menu (Figure 66). The Refer a Peer page displays (Figure 67).
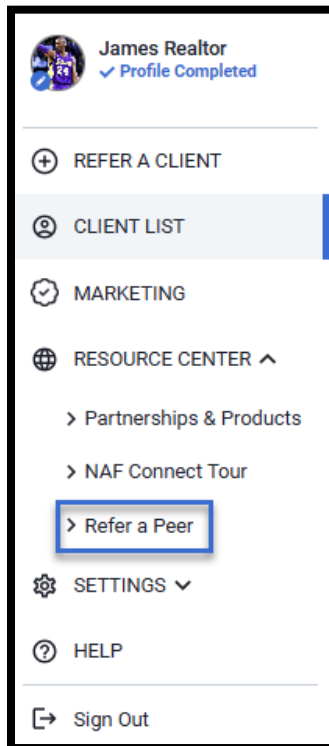
Figure 66 - Navigation Menu - Refer a Peer Button

Figure 67 - Refer a Peer Page - Fields

2. Enter the proper information into the following fields (Figure 67):
   a. Peer First Name
   b. Peer Last Name
   c. Peer Email Address
   d. Peer Cellphone

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📋 **Note: The Loan Officer drop-down menu populates with the user's preferred LOs. Only preferred LOs can be used to refer a peer to the platform (see Adding a Preferred Loan Officer).**

3. Select the **Loan Officer** drop-down button (Figure 67). The Loan Officer drop-down menu displays (Figure 68).
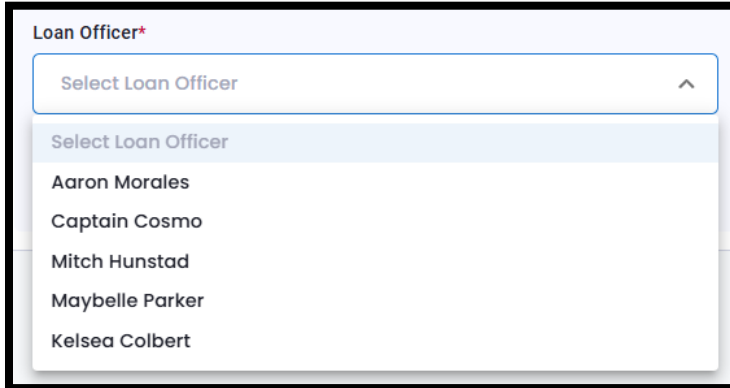
Figure 68 - LO Drop-down Menu - Typical

4. Select the appropriate LO (Figure 68). The page updates and the selected loan officer (LO) appears in the LO field (Figure 69).
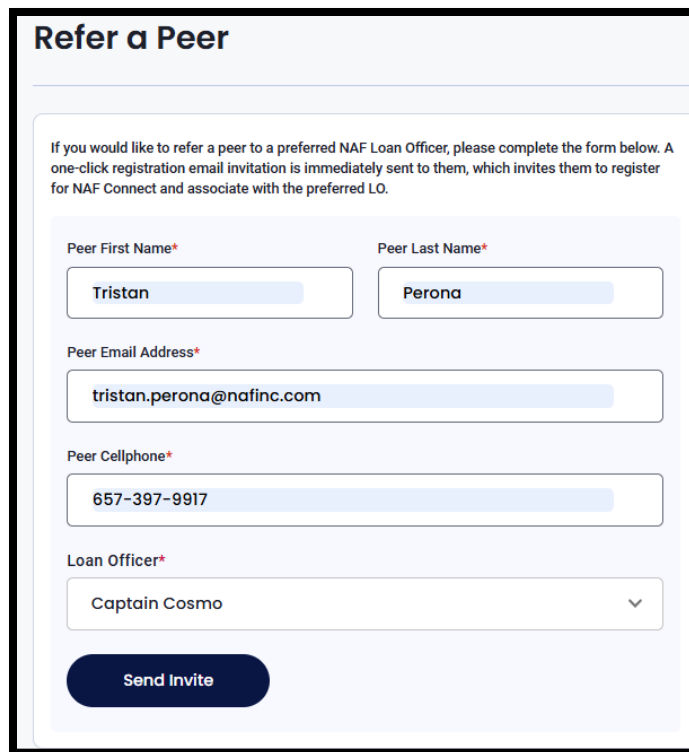
Figure 69 - Refer a Peer Page - Completed

5. Select the **Send Invite** button (Figure 69). The Thank You pop-up (Figure 70) displays and the peer is sent the Peer Referral email (Figure 71).
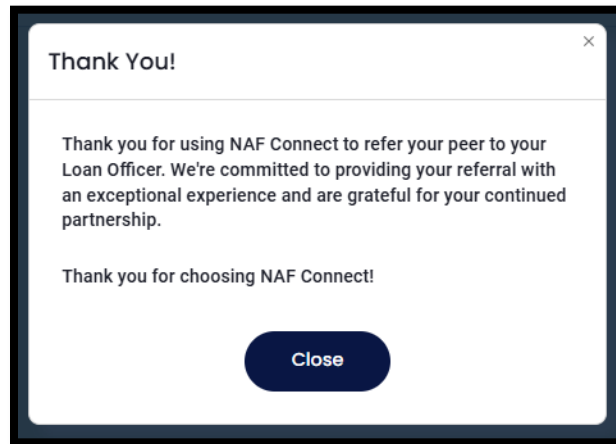
Figure 70 - Thank You Pop-up
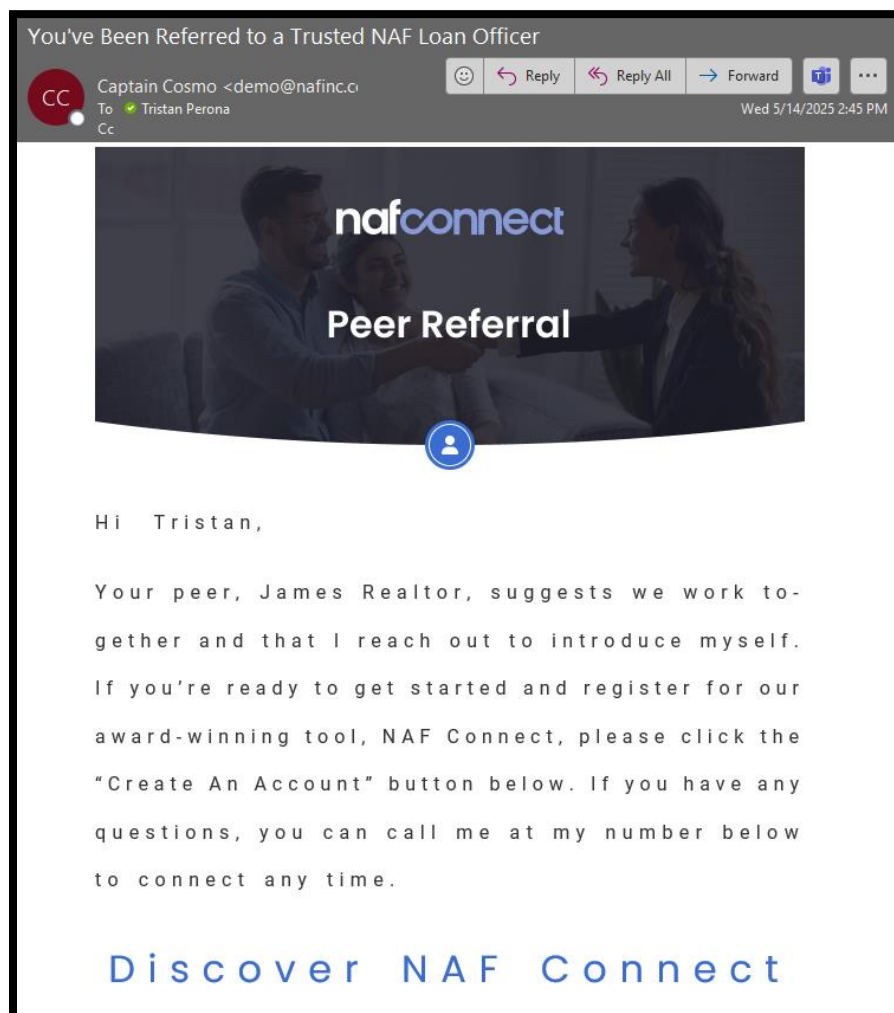
Figure 71 - Referral Email – Typical

Settings

The Settings section of the Navigation menu (Figure 72) allows the user to customize the following account settings:
- Profile Settings
- Loan Officer Settings
- Communications Settings
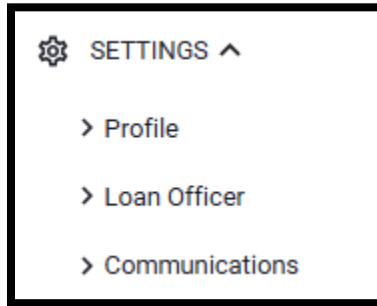
Figure 72 - Navigation Menu - Settings

Profile Settings

📋 **Note: Any changes made to the NAF Connect Profile Settings automatically sync across all NAF products**.

The **Profile** button in the Navigation Menu (Figure 72) opens the Profile Settings (Figure 73). Profile Settings allows the user to change the following information:
- Profile Picture
- Personal Information
- Real Estate License No.
- Company Logo
- Mailing Address
- Company Information
- Password

Figure 73 - Profile Settings – Finished Profile – Typical

The Profile Settings screen displays the **Incomplete Profile Warning** to remind users with incomplete profiles to complete the profile information fields (Figure 74). The Incomplete Profile Warning identifies missing details in the user's profile and dynamically updates as the information is added (Figure 75).

Figure 74 - Profile Settings – Incomplete Profile Warning

Figure 75 - Incomplete Profile Warning – Typical

📋 **Note: The Save Changes button becomes active when the user enters new information into the fields.**

The **Change Email Address** and **Change Cell Phone Number** buttons (Figure 76) open pop-ups that allow users to update their information after completing authorization (see Updating Email Address and Updating Phone Number). Selecting the **Save Changes** or **Update** buttons (Figure 76) applies and saves the updates.

Figure 76 - Profile Settings – Save Changes Button

The following procedures can be performed in Profile Settings:
- Navigating to Profile Settings
- Updating Profile Picture
- Updating Company Logo
- Updating Company Information
- Updating Name or Office Phone Number
- Updating Email Address
- Updating Phone Number
- Updating Real Estate License

Navigating to Profile Settings

Perform the following steps to navigate to the Profile Settings:
1. Select the **Settings** drop-down button (Figure 77) in the Navigation Menu. The **Settings** drop-down menu displays (Figure 78).
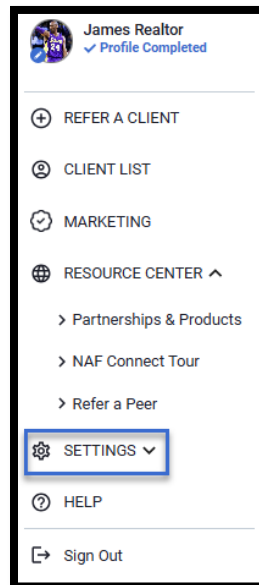
Figure 77 - Navigation Menu - Settings Drop-down Button
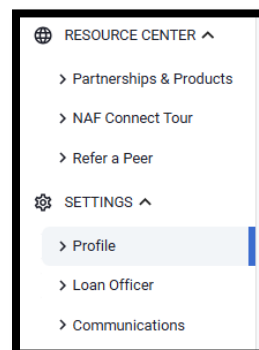
Figure 78 - Navigation Menu - Profile Button

2. Select the **Profile** button (Figure 78). The **Profile Settings** displays (Figure 73).

Perform the following steps to update a profile picture:

1. Navigate to the **Profile Settings** screen (see Navigating to Profile Settings).
2. Select the **Update** button under the profile picture (Figure 79). The Update Profile Picture pop-up displays (Figure 80).
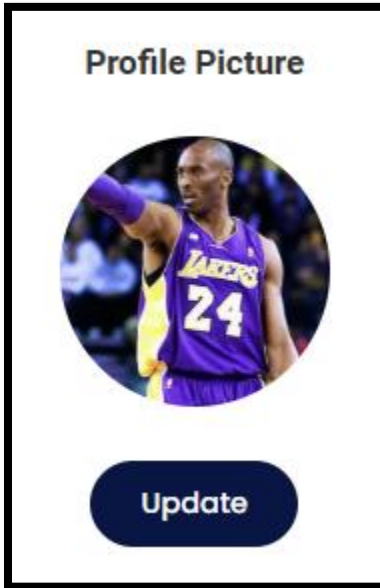
Figure 79 - Profile Picture Section – Update Button
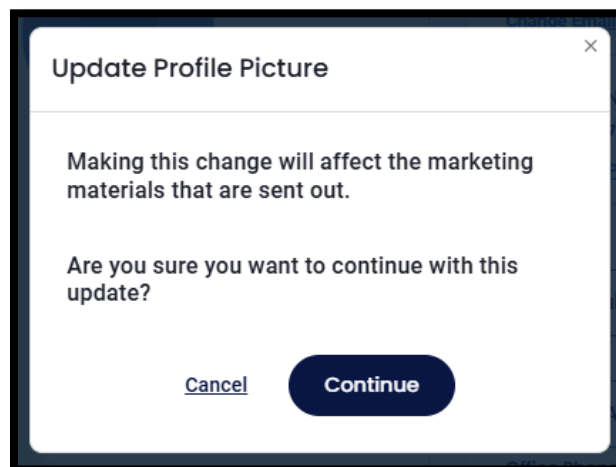
Figure 80 - Update Profile Picture Pop-up

3. Select the **Continue** button (Figure 80). The pop-up closes and the **Drop file here** area displays (Figure 81).
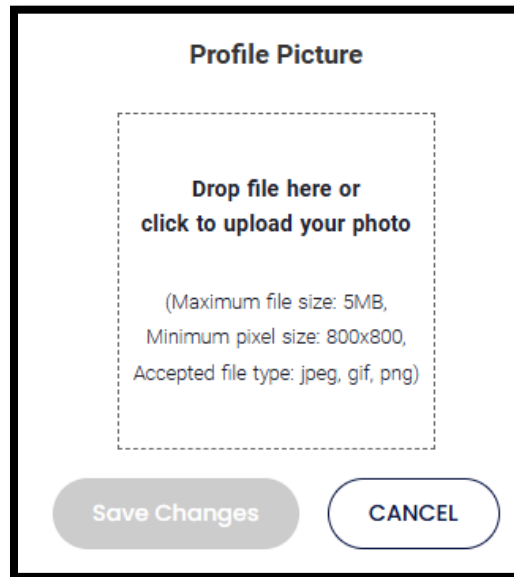
Figure 81 - Profile Picture Section – Drop File Here Area

📋 **Note: Dragging and dropping a file into the dotted lines also uploads a file.**

4. Select the **Drop file here** area to upload the appropriate profile photo (Figure 81). The system file explorer displays (Figure 82 and Figure 83).
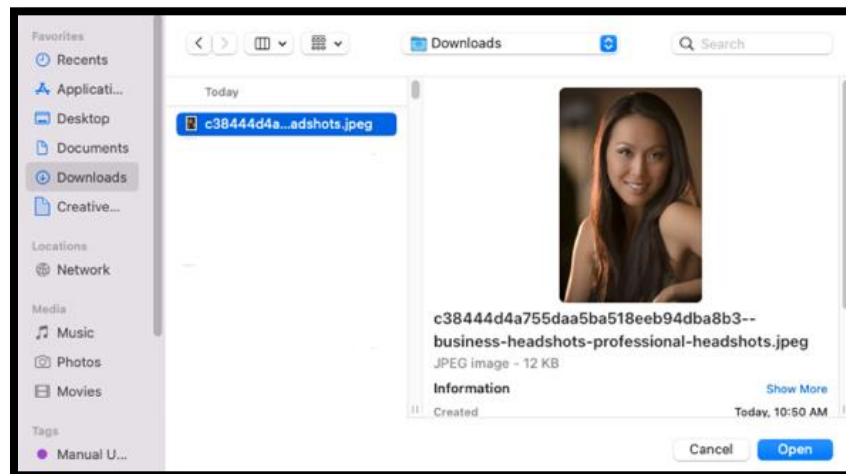
Figure 82 - File Explorer – Mac
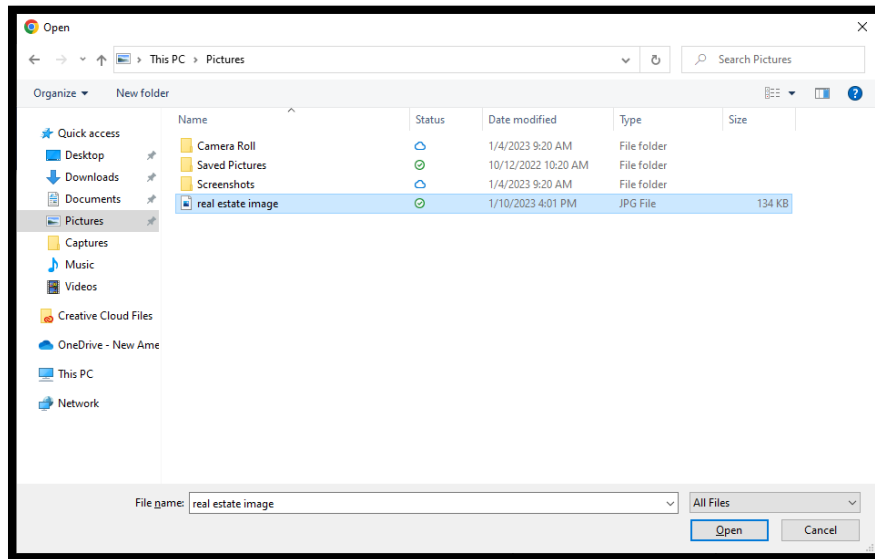
Figure 83 - File Explorer – Windows

📋 **Note: The maximum file size for the photo is 5 megabytes (MB) with a minimum pixel size of 800x800. The only file types accepted are JPEG, GIF, and PNG.**

5. Select the appropriate file for the profile picture (Figure 82 and Figure 83).
6. Select the **Open** button (Figure 82). The **Profile Picture** screen updates with the selected photo (Figure 84).
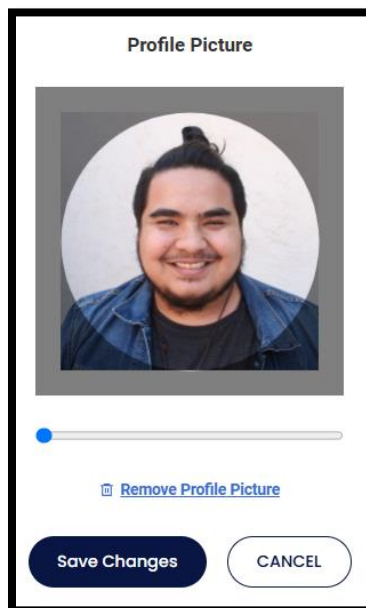
Figure 84 - Profile Picture Section – Uploaded File

7. Select the zoom on the image using the slider (Figure 84).
8. Crop the image by dragging the image (Figure 84).
9. Select the **Save Changes** button (Figure 84). The user profile picture updates to the cropped uploaded image.

Updating Company Logo

Perform the following steps to update the company logo image:
1. Navigate to the **Profile Settings** screen (see Navigating to Profile Settings).
2. Select the **Update** button under the company logo (Figure 85). The Update Company Picture pop-up displays (Figure 86).
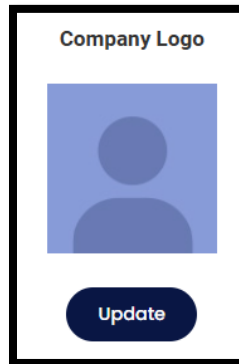
Figure 85 - Company Logo Section – Update Button
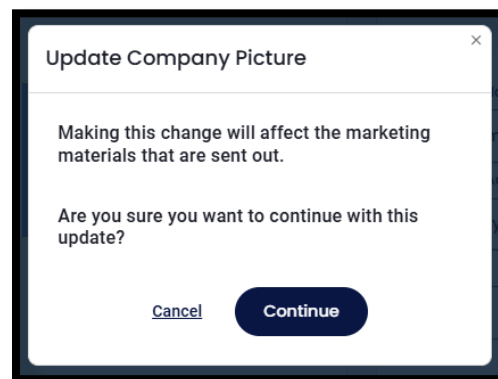
Figure 86 - Update Company Picture Pop-up

3. Select the **Continue** button (Figure 86). The **Drop file here** area displays (Figure 87).
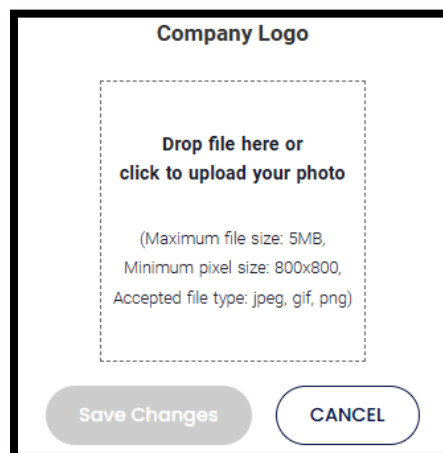
Figure 87 - Company Logo Section – Drop File Here Area

📋 **Note: Dragging and dropping a file into the dotted lines also uploads a file.**

4. Select the **Drop file here** section (Figure 87). The system file explorer displays (Figure 88 and Figure 89).
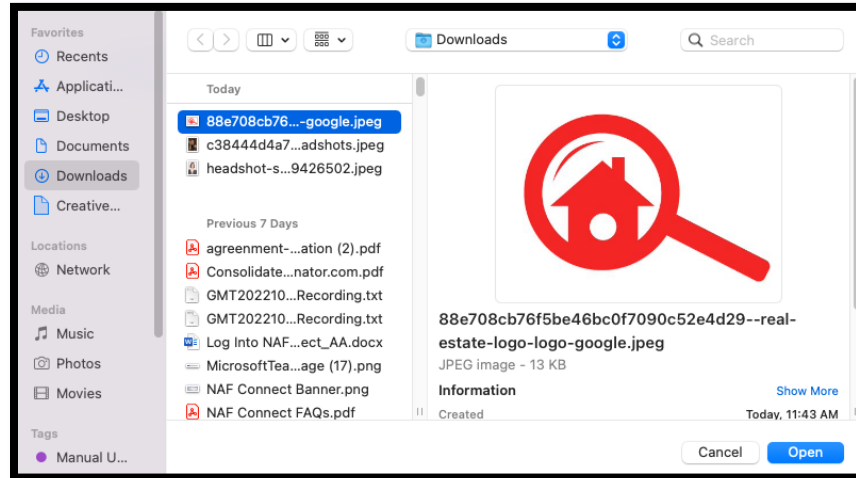
Figure 88 - File Finder – Company Logo Image
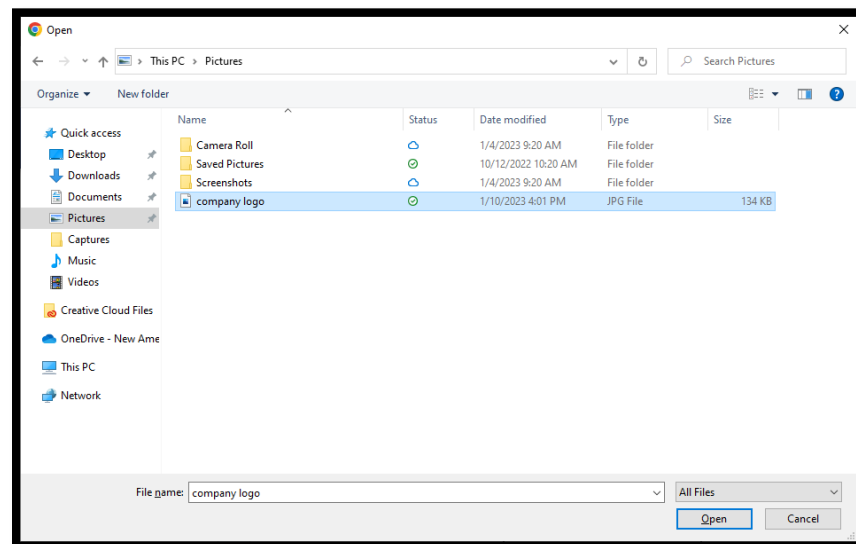
Figure 89 - File Finder – Windows

📋 **Note: The maximum file size for the photo is 5 Megabytes (MB) with a minimum pixel size of 800x800. The only file types accepted are JPEG, GIF, and PNG.**

5. Select the appropriate file (Figure 88 and Figure 89).
6. Select the **Open** button (Figure 88 and Figure 89). The **Company Logo** updates with the uploaded file (Figure 90).

Figure 90 - Company Logo Section – Save Changes Button

7. Select the zoom on the image using the slider (Figure 90).
8. Crop the image by dragging the image (Figure 90)
9. Select the **Save Changes** button (Figure 90).

Updating Company Information

Perform the following steps to update company information:
1. Navigate to the **Profile Settings** screen (see Navigating to Profile Settings).
2. Verify or update the information in the **Company Information** section (Figure 91):
   a. Company Name
   b. Company Address
   c. City
   d. State
   e. Zipcode

Figure 91 - Company Information Section

📋 **Note: The Save Changes button changes colors when a field contains new information (Figure 92).**

3. Select the **Save Changes** button (Figure 92).

Company Information

Company Name

Jamming Mortgage

Company Address

4708 Downlow Road St 8

City	State	Zipcode
Los Angeles	CA ˅	90014

Save Changes

Figure 92 - Company Information Section – Save Changes Button Active

Updating Name or Office Phone Number

Perform the following steps to update personal information:
1. Navigate to the **Profile Settings** screen (see Navigating to Profile Settings).
2. Edit the required following information in the **Personal Information** section (Figure 93). The screen updates with new information and the Save Changes button becomes blue.
   a. First Name
   b. Last Name
   c. Office Phone Number

Figure 93 - Personal Information Section – Typical

3. Select the **Save Changes** button (Figure 94).
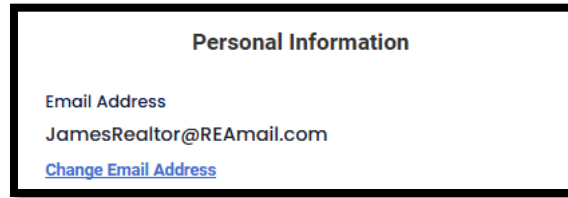
Figure 94 - Personal Information Section – Save Changes Button Active

Updating Email Address
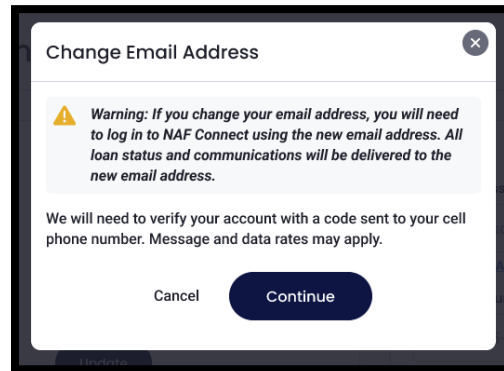
Perform the following steps to update the account email address:
1. Navigate to the **Profile Settings** screen (see Navigating to Profile Settings).
2. Select the **Change Email Address** button (Figure 95). The Change Email Address pop-up displays (Figure 96).

Figure 95 - Change Email Address Button
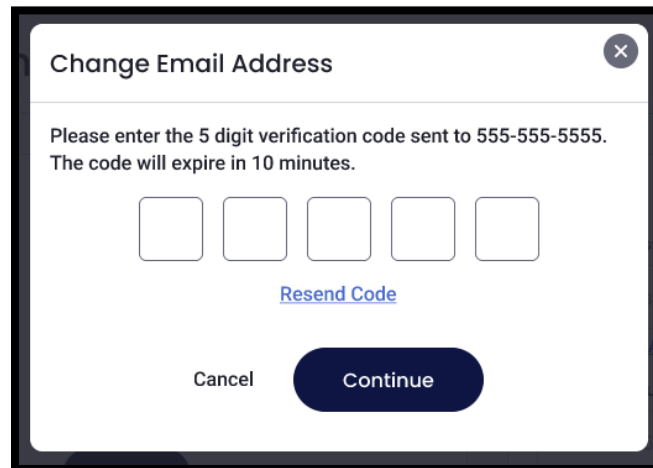
Figure 96 - Change Email Address Pop-up - Warning

3. Select the **Continue** button (Figure 96). The pop-up updates (Figure 97) and a verification code is sent to the phone number associated with the account.
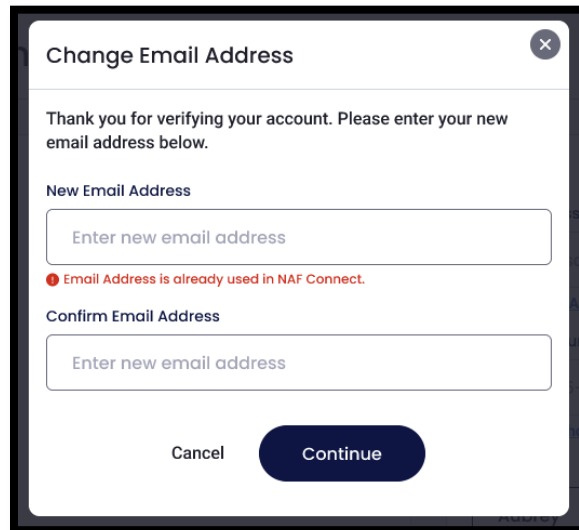
Figure 97 - Change Email Address Pop-up - Phone Verification Sent

4. Enter the verification code sent to the associated phone number into the pop-up (Figure 98).
5. Select the **Continue** button (Figure 97). The pop-up updates (Figure 98).

Figure 98 - Change Email Address Pop-up - New Email Address

📋 **Note: Users cannot change their email address to one used by another NAF Connect account.**

6. Enter the new email address into the **New Email Address** and **Confirm Email Address** fields (Figure 98).

Figure 99 - Change Email Address Pop-up - Verification Email Sent

7. Enter the verification code sent to the new email address into the pop-up (Figure 99).
8. Select the **Continue** button (Figure 99). The pop-up updates with a success message and the user email address is changed to the new email address (Figure 100).
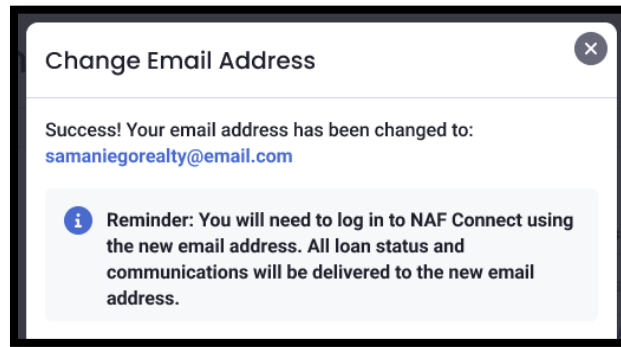
Figure 100 - Change Email Address Pop-up - Success Message
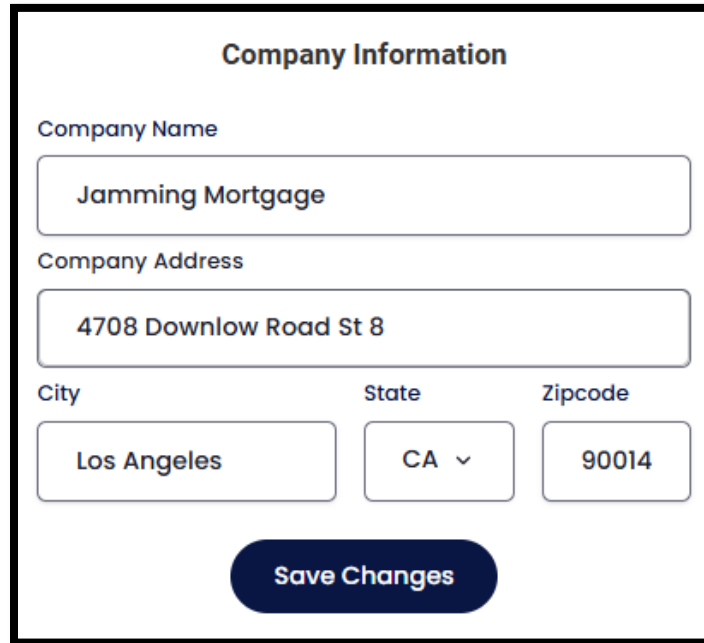
Updating Phone Number

Perform the following steps to update the account email address:
1. Navigate to the **Profile Settings** screen (see Navigating to Profile Settings).
2. Select the **Change Cell Phone Number** button (Figure 101). The Change Cell Phone Number pop-up displays (Figure 102).
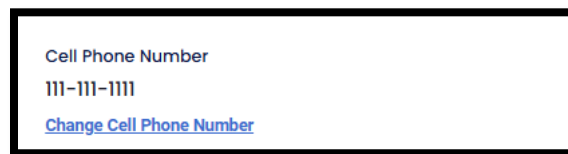
Figure 101 - Profile Settings - Change Cell Phone Number Button
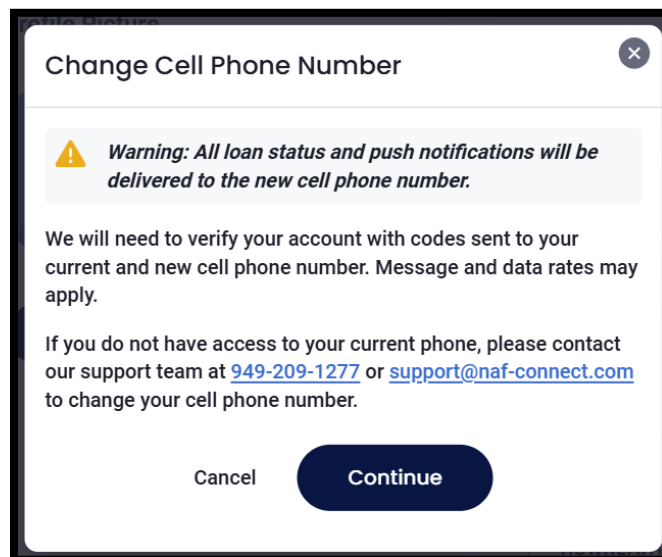
Figure 102 - Change Cell Phone Number - Warning

3. Select the **Continue** button (Figure 102). The pop-up updates (Figure 103) and sends a verification code to the phone number associated with the user.
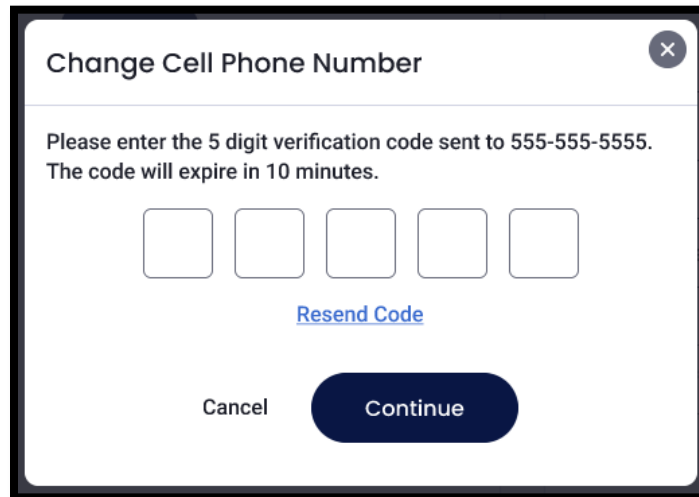
Figure 103 - Change Cell Phone Number Pop-up - Phone Verification

4. Enter the verification code sent to the associated phone number into the pop-up (Figure 103).
5. Select the **Continue** button (Figure 103). The pop-up updates (Figure 104).
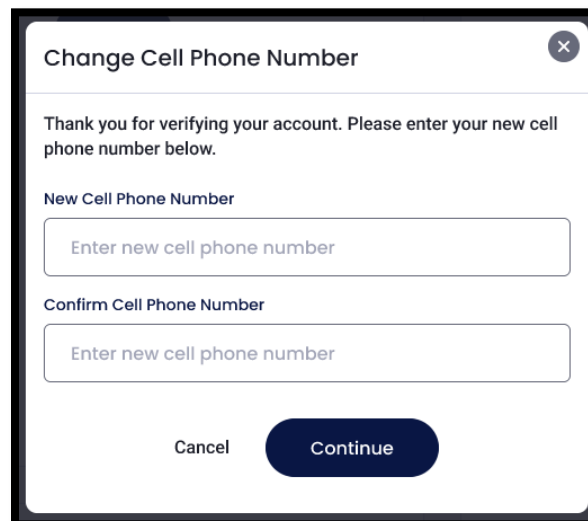
Figure 104 Change Cell Phone Number Pop-up - New Number

6. Enter the new cell phone number in both the **New Cell Phone Number** and **Confirm Cell Phone Number** fields (Figure 104).
7. Select the **Continue** button (Figure 104). The pop-up updates (Figure 105) and sends a verification code to the new phone number.
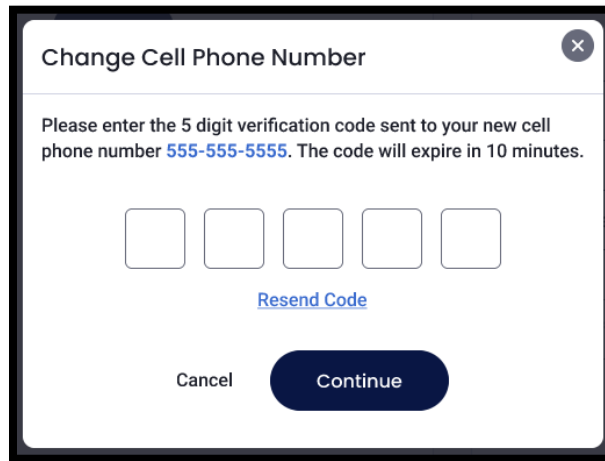
Figure 105 - Change Cell Phone Number Pop-up - New Phone Verification

8. Enter the verification code sent to the new phone number into the pop-up (Figure 105).
9. Select the **Continue** button (Figure 105). The pop-up displays a success message (Figure 106), and the updated phone number is now used for all account communications.
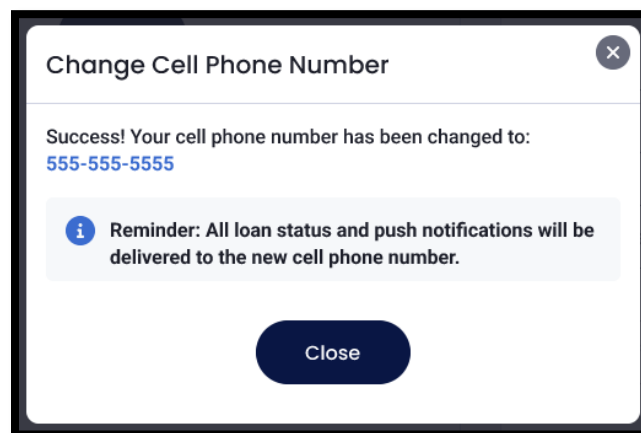
Figure 106 - Change Cell Phone Number Pop-up - Success Message

Updating Real Estate License

Perform the following steps to update the real estate license:
1. Navigate to the **Profile Settings** screen (see Navigating to Profile Settings).
2. Scroll to the bottom of the web page. The **Real Estate License** section displays (Figure 107).

Figure 107 - Real Estate License Section – Typical

3. Update the following required Real Estate License information (Figure 107):
    a. Real Estate License Number(s)
    b. State(s)
4. Select the **Save Changes** button (Figure 107).

Add Additional Real Estate License

Perform the following steps to add a new real estate license:
1. Navigate to the **Profile Settings** screen (see Navigating to Profile Settings).
2. Scroll to the bottom of the web page. The **Real Estate License** section displays (Figure 107).
3. Select the **Add Additional License (Max. 3)** button (Figure 107). The screen updates with a new license field (Figure 108).

Figure 108 - Additional Real Estate License Number

4. Update the following required Real Estate License information (Figure 108):
    a. Real Estate License Number(s)
    b. State(s)
5. Select the **Save Changes** button (Figure 108).

Updating Mailing Address

Perform the following steps to update the mailing address:
1. Navigate to the **Profile Settings** screen (see Navigating to Profile Settings).
2. Scroll to the middle of the web page. The **Mailing Address** section displays (Figure 109).

Figure 109 - Mailing Address Section – Typical

3. Select either the **Same as Company Address** or **Other** radio button (Figure 109).
   a. Selecting the **Other** radio button updates the screen with the Mailing Address fields. Perform the following tasks:
      i. Enter the appropriate address into the **Mailing Address** field (Figure 109).
      ii. Enter the appropriate city into the **City** field (Figure 109).
      iii. Select the state from the **State** drop-down menu.
      iv. Enter the appropriate zipcode into the **Zipcode** field (Figure 109).
4. Select the **Save Changes** button (Figure 109).

Changing Password

Perform the following steps to change a password:
1. Navigate to the **Profile Settings** screen (Figure 73).

📋 **Note: New passwords must meet the listed requirements (Figure 111) to be accepted.**

2. Enter the following required information into the **Password** section (Figure 110):
   a. Current Password
   b. New Password
   c. Confirm New Password
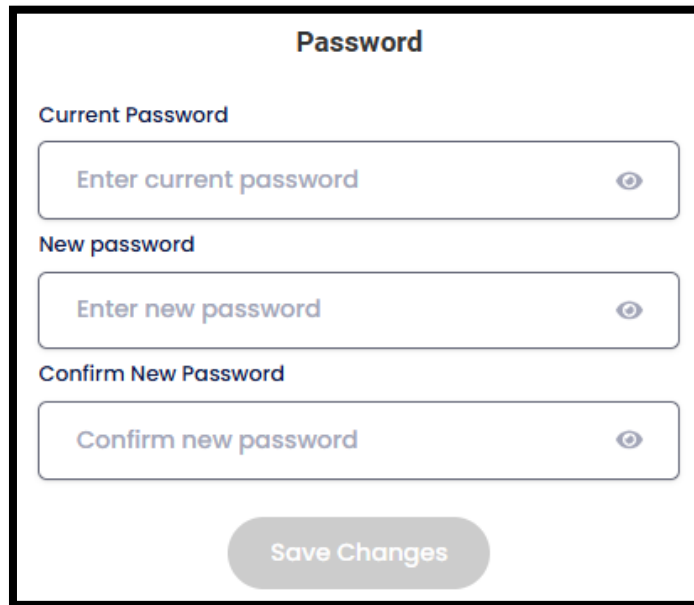
Figure 110 - Password Section – Typical

Figure 111 - Password Requirements - Typical

3. Select the **Save Changes** button (Figure 112).

Figure 112 - Password Section – Save Changes Button Active

Loan Officer Settings

The **Loan Officer Settings** page (Figure 113) allows users to search and add preferred loan officers. Marking loan officers as preferred sets them as the default option for client referrals. The Loan Officer Settings page is comprised of the following information:

- Loan Officer introduction
- Search for a Loan Officer search bar
- Preferred Loan Officer(s)
- Loan Officer phone number
- Loan Officer email address
- Loan Officer licensed states

Figure 113 - Loan Officer Settings

The following procedures can be performed in the Loan Officer Settings:
- Navigating to the Loan Officers Settings
- Adding a Preferred Loan Officer
- Removing a Preferred Loan Officer
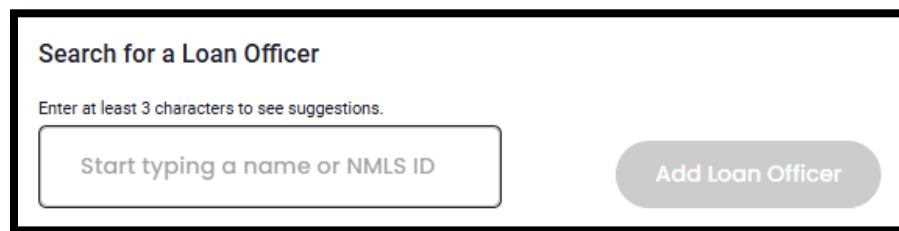
Perform the following steps to navigate to the Loan Officer Settings:
1. Select the **Settings** drop-down button in the Navigation menu (see Navigation Menu). The **Settings** drop-down menu displays (Figure 36).
2. Select the **Loan Officer** option (Figure 36). The **Loan Officers** section displays (Figure 113).

Adding a Preferred Loan Officer

Perform the following steps to add a preferred loan officer:
1. Navigate to the **Loan Officer Settings** (see Navigating to the Loan Officers Settings).
2. Enter the name of the appropriate LO or Nationwide Multistate Licensing System (NMLS) ID into the **Search for a Loan Officer** search box (Figure 114). The **Loan Officer** drop-down menu displays (Figure 115).
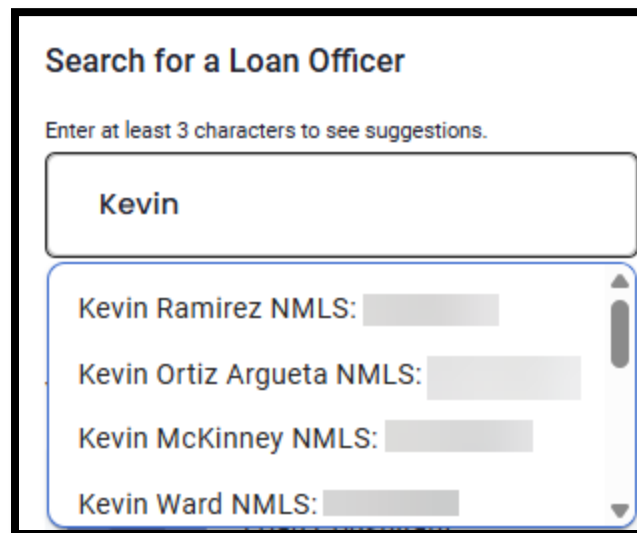
Figure 114 - Loan Officer Search Box

Figure 115 - Loan Officer Search Box – Loan Officer Drop-Down

📋 **Note: The Add Loan Officer button changes from grey to blue when a new LO is added as a preferred LO (Figure 116).**

3. Select the appropriate LO from the drop-down menu (Figure 115).

Figure 116 - Loan Officer Search Box – Active Add Loan Officer Button

4. Select the **Add Loan Officer** button (Figure 116). The **Your Preferred Loan Officer(s)** section updates (Figure 117).

Figure 117 - Loan Officer Page – Preferred Loan Officer(s) Displayed

Removing a Preferred Loan Officer

Perform the following steps to remove a preferred loan officer:
1. Navigate to the **Loan Officer** Settings page (see Navigating to the Loan Officers Settings).
2. Navigate to the appropriate LO.
3. Select the **Remove** button (Figure 118). The **Your Preferred Loan Officer(s)** section displays without the removed LO.
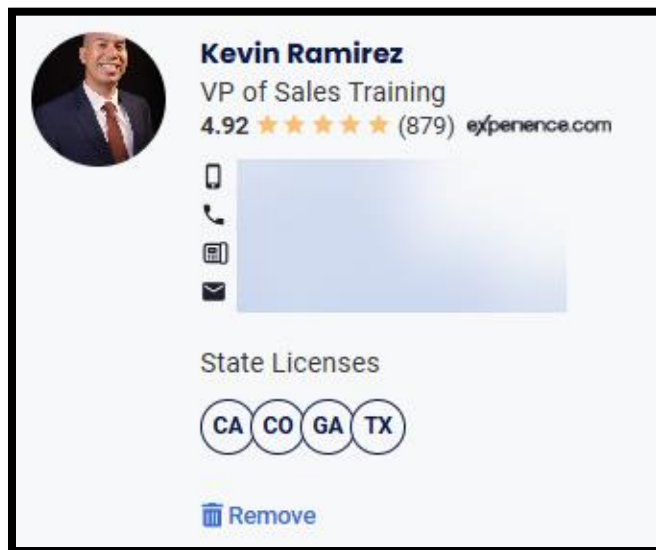
Figure 118 - Your Preferred Loan Officer(s) Section – Remove Button

Communications Settings

The **Communications Settings** page (Figure 119) allows users to set what notifications the NAF Connect platform sends them through text, email, and push notifications.

Figure 119 - Communications Settings

The following procedures can be performed in the Communications Settings page:
- Navigating to the Communications Settings
- Updating Communication Preferences
- Updating Product and Marketing Preferences

Navigating to the Communications Settings

Perform the following steps to navigate to the Communications Section:
1. Select the **Settings** option on the left side of the dashboard (Figure 30). The **Settings** drop-down menu displays (Figure 36).
2. Select the **Communications Option** (Figure 36). The **Communications Settings** page displays (Figure 119).

Updating Communication Preferences

Perform the following tasks to update communication preferences:
1. Navigate to the **Communications Settings** page (see Navigating to the Communications Settings).
2. Select the checkboxes of the desired settings (Figure 120).

Figure 120 - Email Subscription Preferences Section

📋 **Note: The Save Changes button turns from blue to gray when new settings are selected (Figure 94).**

3. Select the **Save Changes** button (Figure 121).

Figure 121 - Email Subscriptions Preferences Section – Save Changes Button Active

Updating Product and Marketing Preferences

Perform the following steps to update product and marketing preferences:
1. Navigate to the **Communications Settings** page (see Navigating to the Communications Settings).
2. Select the **Manage Preferences** button at the bottom of the page (Figure 122). The Preference Center opens in a new tab (Figure 123).

Figure 122 - Manage Preferences Button

Figure 123 - Preferences Center - Typical

3. Select the checkbox next to the desired preferences (Figure 123).
4. Select the **Save Preferences** button (Figure 123). NAF Connect updates the user's phone and text preferences.

The **Help** page (Figure 124) displays resources for users to find and contact support on the NAF Connect platform. The following resources are available:

- Training Button
- User Guide Button
- FAQ Button
- Sign Out Button
- Feedback Button
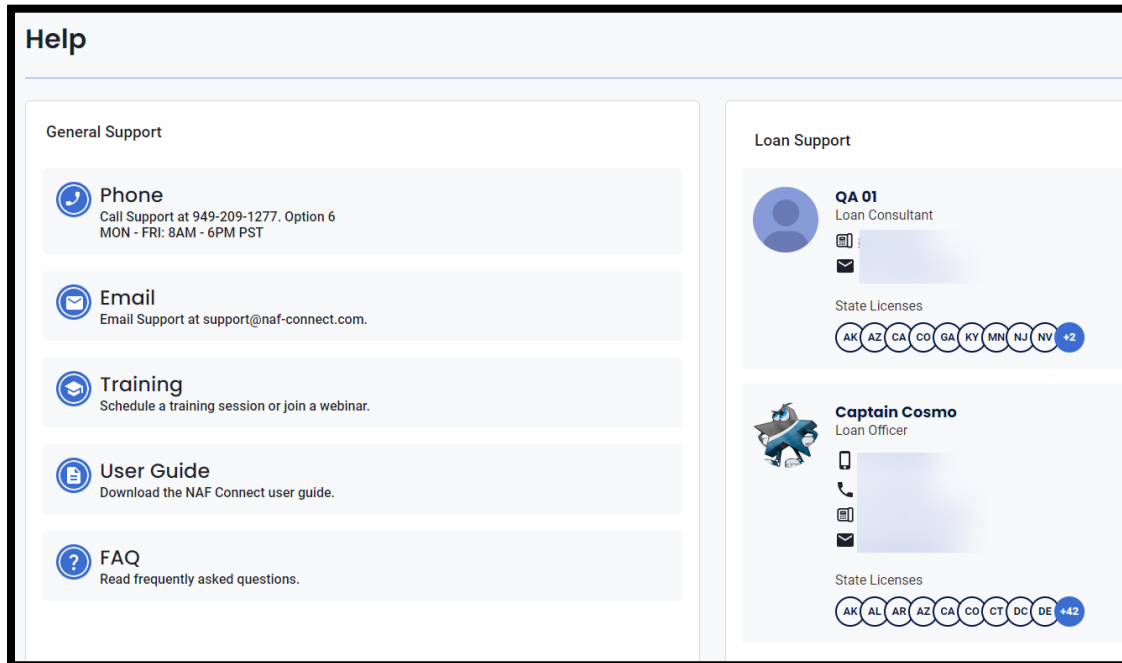
Figure 124 - Help Section

Training Button

Selecting the **Training** button (Figure 124) opens the NAF Connect training page (Figure 125) in the default browser. NAF Connect training and one-on-one assistance sessions are available to all users.
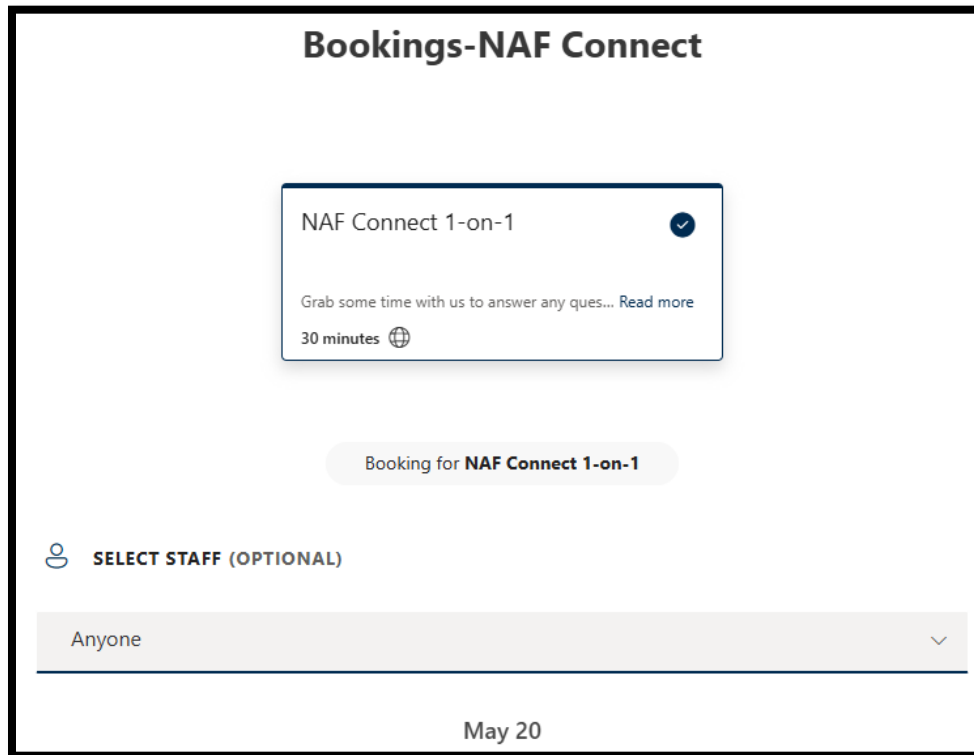
Figure 125 - NAF Connect Training Calendly

User Guide Button

Selecting the **User Guide** button (Figure 124) opens the NAF Connect User Guide in a new browser tab.

FAQ Button

Selecting the **FAQ** button (Figure 124) opens the FAQ page (Figure 126) which lists and answers frequently asked questions from NAF Connect users.
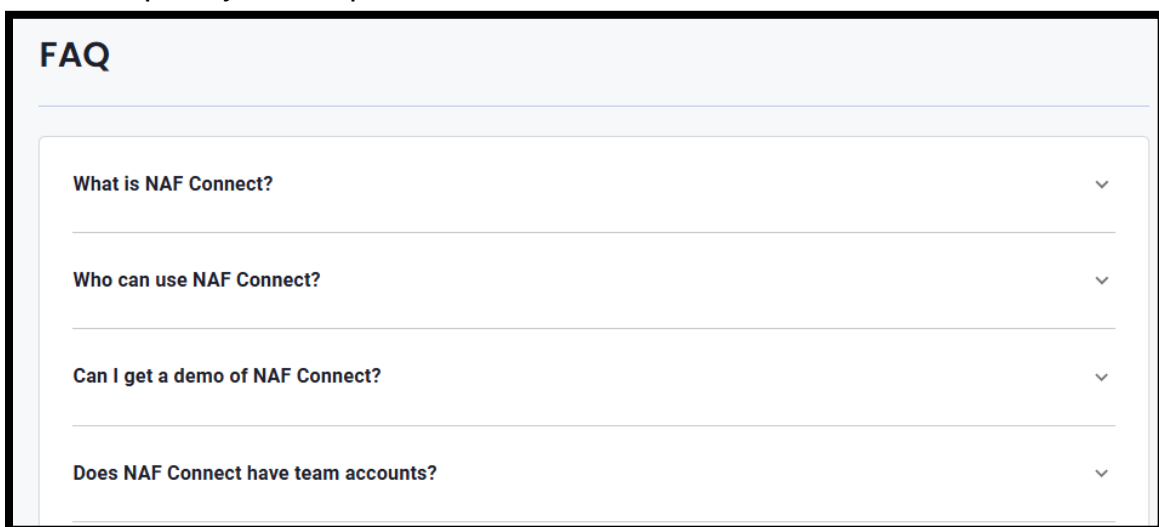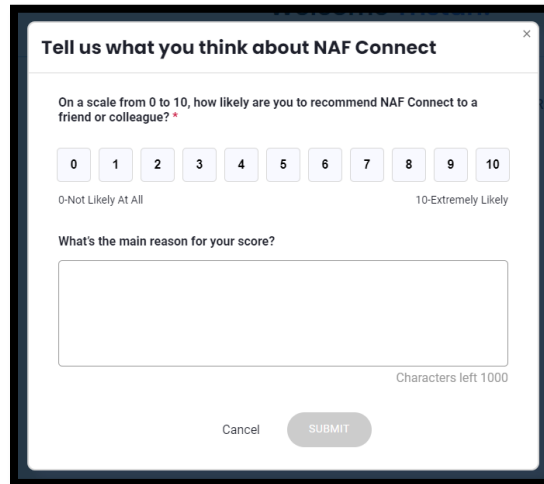
Figure 126 - FAQ Page

Sign Out Button

The **Sign Out** button (Figure 30) is located on the left side of the Dashboard and allows the user to sign out of the NAF Connect platform.

Feedback Button

The **Feedback** button (Figure 28 and Figure 33) is located on the right side of most screens and opens the Feedback pop-up. The Feedback pop-up (Figure 127) allows users to send feedback to the NAF Connect team to improve the platform.

Figure 127 - Feedback Pop-up

CHAPTER 2: ENROLLMENT AND LOGIN

Enrollment

REAs and Builders must register for a NAF Connect account to use the platform. Potential users can be referred to the platform by a user and are invited to create an account by email (Figure 71). Accounts are flagged as either REAs or builders (see REA and Builder Account Types).

Enrolling for an Account with Email

Perform the following steps to enroll for a NAF Connect account:

📋 **Note: Google Chrome and Safari are the preferred web browsers for NAF Connect.**

1. Navigate to the NAF Connect platform at https://naf-connect.com/ (Figure 128) in a web browser. The NAF Connect Login Page displays (Figure 2 and Figure 3).
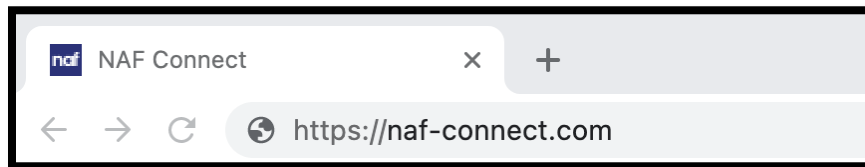
Figure 128 - NAF Connect URL

2. Select the **Sign Up** button in the top corner (Figure 129). The **Create an Account** pop-up displays (Figure 130).
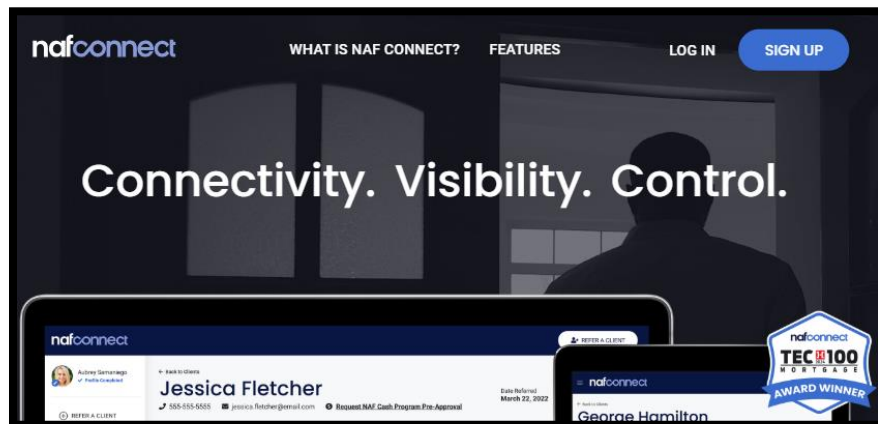
Figure 129 - NAF Connect Landing Page
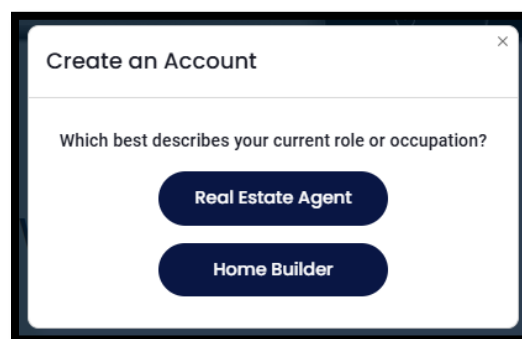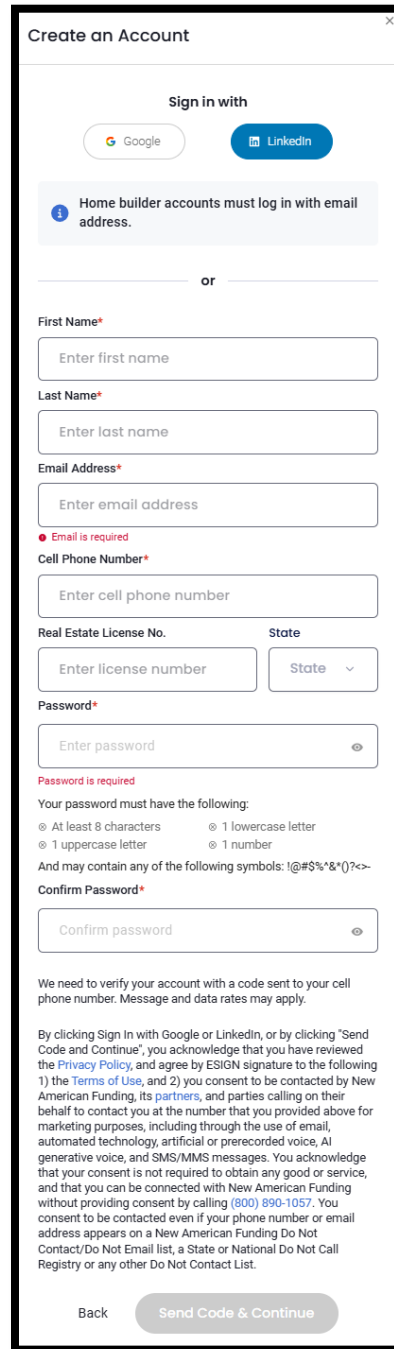
Figure 130 - Create an Account Pop-up

📋 **Note: Builder accounts do not contain all the features of a Real Estate Agent account (see REA and Builder Account Types). Social Sign In is not available for Builder accounts.**

3. Select the desired account type (Figure 130). The **Create an Account** pop-up displays (Figure 131).

Figure 131 - Create an Account Pop-up – Creation

4. Enter the following required information into the textboxes (Figure 131):
   a. First Name
   b. Last Name

    c. Email Address
    d. Cell Phone Number
    e. Real Estate License Number
    f.   State
    g. Password
    h. Confirm Password

5. Select the **Send Code & Continue** button (Figure 131). The **Verification** screen displays (Figure 132).

Figure 132 - Verification Screen – Typical

6. Enter the code texted to the user phone number (Figure 132).

📋 **Note: NAF Connect pulls current leads and loans from BankerView for real estate agents who have worked with NAF prior to enrolling in NAF Connect.**

7. Select the **Register** button (Figure 132).

Enrolling for an Account with Social Sign In

Perform the following tasks to enroll for a NAF Connect account with Social Sign In:

📋 **Note: Google Chrome and Safari are the preferred web browsers for NAF Connect.**

1. Navigate to the NAF Connect platform at <ins>https://naf-connect.com/</ins> (Figure 128) in a web browser. The NAF Connect Login Page displays (Figure 2 and Figure 3).
2. Select the **Sign Up** button in the top corner (Figure 2). The **Create an Account** pop-up displays (Figure 131).
3. Select a **Social Sign In** button (Figure 131). The 3rd party pop-up displays (Figure 133).
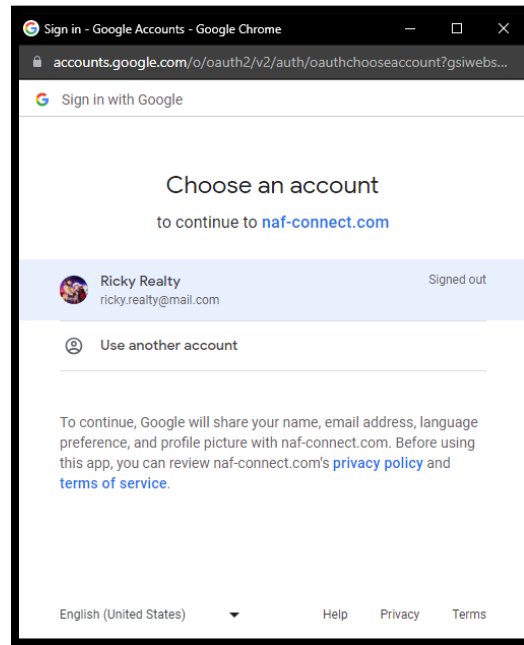
Figure 133 - 3rd Party Social Sign In – Typical

4. Select the desired account or **Use another account** button (Figure 133). The 3rd Party Sign In page displays (Figure 134).
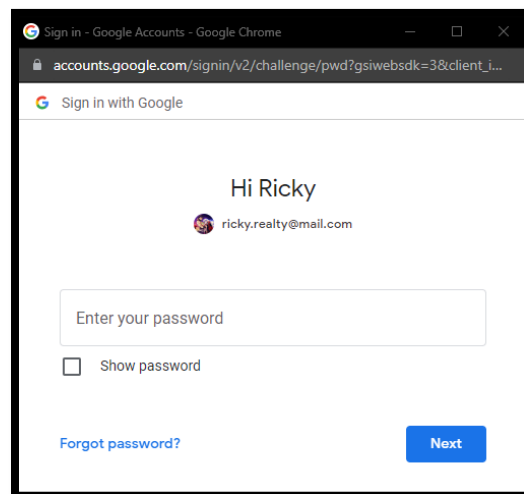
Figure 134 – Third-Party Sign In Page – Typical

5. Enter the password into the **Password** field (Figure 134).
6. Select the **Next** button (Figure 134). The Dashboard displays (see Dashboard).

📋 **Note: Enrollment is required to log into NAF Connect (see Enrollment).**

The Log In pop-up (Figure 135) displays after the user enrolls for a NAF Connect account or selects the **Log In** button on the NAF Connect landing page. Logging into NAF Connect opens the Client List with the Real-time Alerts pop-up (Figure 136) unless the user enables real-time mobile notifications.

Figure 135 - Log In Pop-up

Figure 136 - Real-time Alerts Pop-up

Logging into NAF Connect with Email

📋 **Note: Google Chrome and Safari are the preferred web browsers for NAF Connect.**

Perform the following steps to log into NAF Connect:
1. Navigate to the NAF Connect platform at https://naf-connect.com/ (Figure 128) in a web browser. The NAF Connect Login Page displays (Figure 2 and Figure 3).
2. Select the **Log In** button at the top of the page (Figure 2). The **Log In** pop-up displays (Figure 137).

Figure 137 - NAF Connect Log In Screen

3. Enter the email address and password credentials into the required textboxes (Figure 137).
4. Select the **Log In** button (Figure 137). The Dashboard displays (see Dashboard).

Logging into NAF Connect with Social Sign In

Perform the following tasks to log into NAF Connect with Social Sign:
1. Navigate to the NAF Connect platform at https://naf-connect.com/ (Figure 128) in a web browser. The NAF Connect Login Page displays (Figure 2 and Figure 3).
2. Select the **Log In** button at the top of the page (Figure 2). The **Log In** pop-up displays (Figure 137).
3. Select a **Social Sign In** button (Figure 137). The 3rd party pop-up displays (Figure 133).
4. Select the desired account (Figure 133). The 3rd Party Sign In page displays (Figure 134).
5. Enter the password into the **Password** field (Figure 134).

📋 **Note: Accounts that have not shared all appropriate information to NAF Connect displays the Additional Permissions pop-up (Figure 138) before the Dashboard. NAF Connect sends a verification code to the cell phone number on record if the account has not been verified.**

6. Select the **Next** button (Figure 134). The Dashboard displays (see Dashboard).
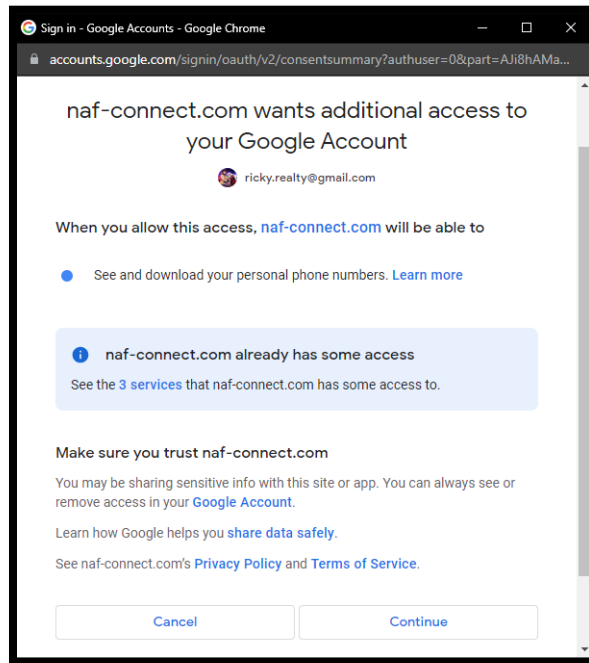
Figure 138 - Additional Permissions Pop-up – Typical

CHAPTER 3: FEATURES

Clients

The Dashboard displays the Client List (Figure 139). The **Clients** button in the Navigation menu (Figure 30) returns the user to the Client List. Selecting the **Refer a Client** button begins the referral process for new clients (see Referring a Client). Clients listed in the platform have opened a loan application with NAF, and their deal information displays in the following features:

- Client List
- Client Profile
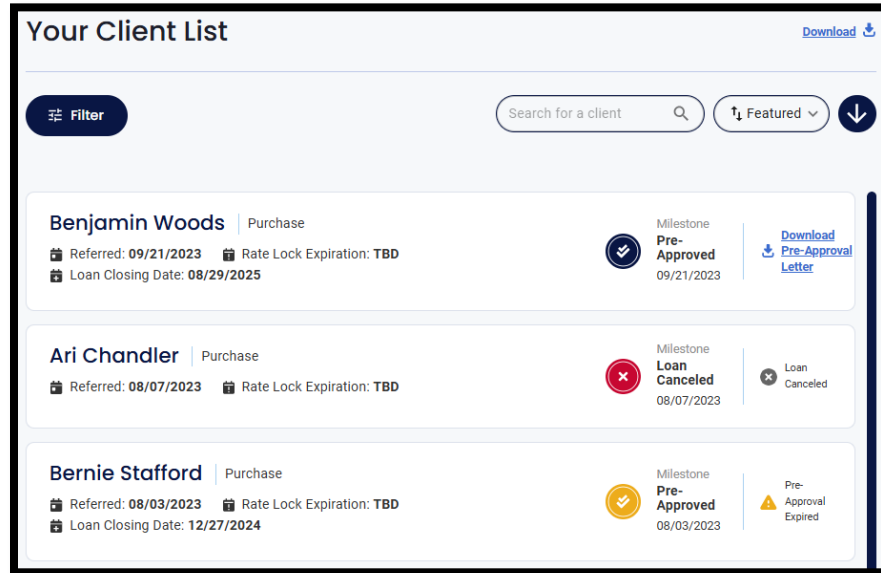
Figure 139 - Client List - Typical

Client Profile

Selecting a name in the Client List opens their **Client Profile** (Figure 140) which displays the status of their loan application and relevant loan information. The Client Profile is comprised of the following features:

- Loan Milestones
- Client Notes
- Loan Officer panel

The following procedures can be performed from the Client Profile:

- Editing a Pre-Approval Letter
- Viewing a Pre-Approval Letter
- Printing a Pre-Approval Letter
- Downloading a Pre-Approval Letter
- Adding a Note
- Calling a Client
- Emailing a Client

Figure 140 - Client Profile

Loan Milestones

Loan Milestones can be viewed from the **Client Profile** using the Loan Milestone Tracker (Figure 141). The Loan Milestones Tracker updates when a milestone is completed and moves to the next step. Notifications can be sent to the user based on settings. NAF Connect contains the following loan milestones:

- Referral Submitted Milestone
- Pre-Approved Milestone
- Submitted to Underwriting Milestone
- Conditionally Approved Milestone
- Final Review Milestone
- Cleared to Close Milestone
- Funded Milestone
- Loan Canceled Milestone
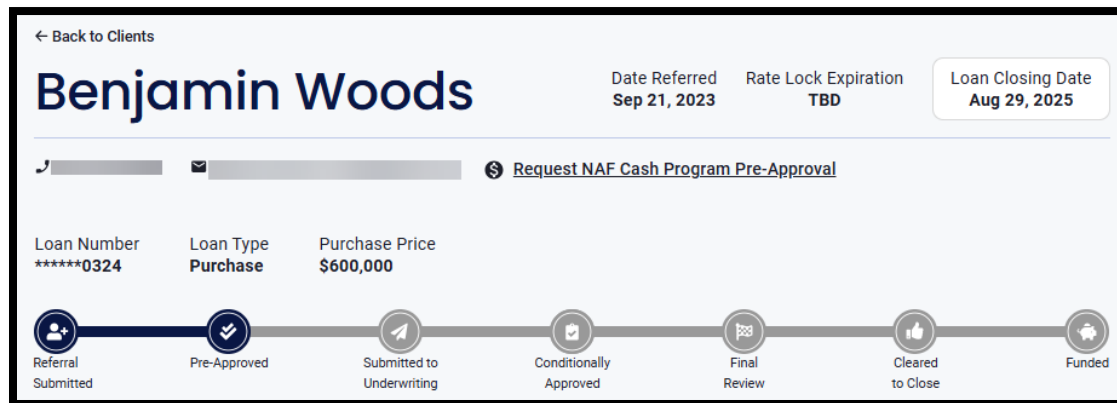
Figure 141 - Client Profile – Loan Milestone Tracker

Referral Submitted Milestone

The **Referral Submitted** milestone (Figure 142) displays when a referral is sent to a client. Clients at the Referral Submitted milestone have received an email to join NAF Connect but have not started their application.
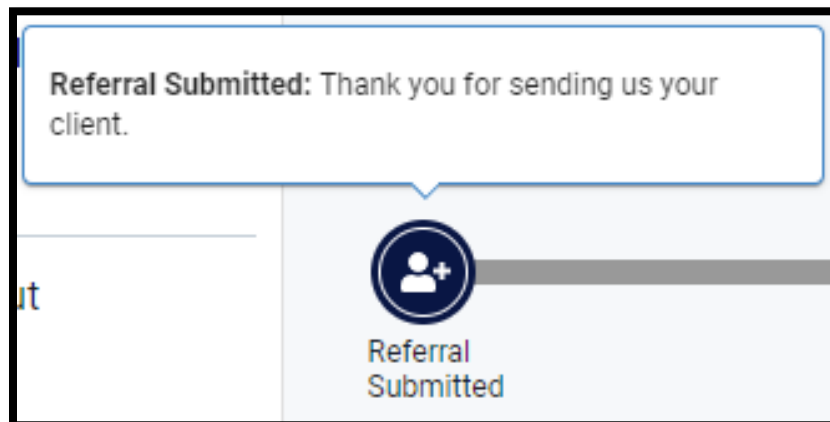
Figure 142 - Loan Milestone – Referral Submitted

The **Pre-Approved** milestone (Figure 143) displays when the applicant submits the required loan application information. Clients at the Pre-Approved milestone meet the preliminary requirements for a loan but must submit additional information for underwriter review.

Figure 143 - Loan Milestone – Pre-Approved

Users cannot obtain Pre-Approval letters for clients at the Pre-Approved milestone until the associated LO fills out the appropriate deal information. The **Message to Loan Officer** field (Figure 144) displays on client profiles who do not have a valid Pre-Approval letter. Entering a message into the **Message to Loan Officer** field and selecting the **Submit** button (Figure 144) requests a new Pre-Approval Letter from the client's Loan Officer.
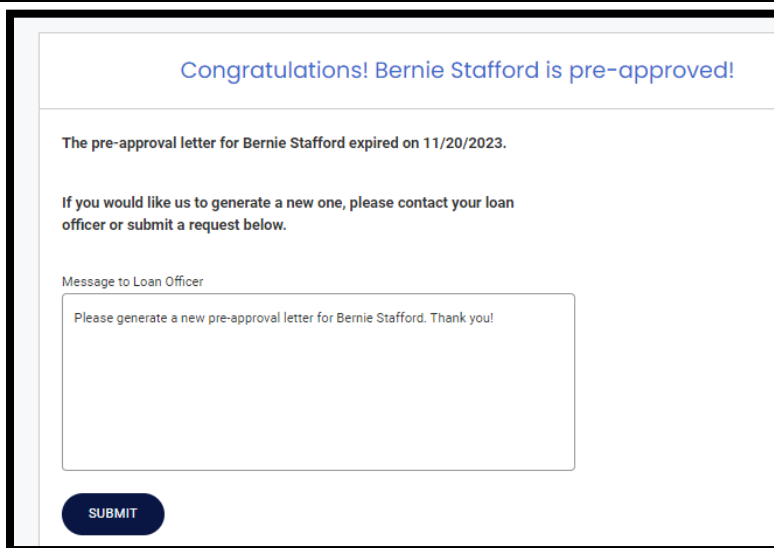
Figure 144 - Expired Pre-Approval Letter – Typical

Clients with an available Pre-Approval Letter display the **Download Pre-Approval Letter** button (Figure 145) on the Client List.
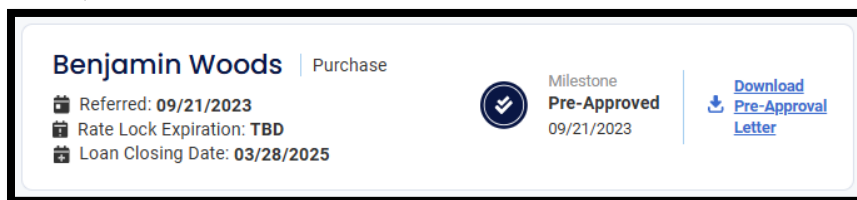
Figure 145 - Pre-Approved Milestone - Available

Pre-Approval letters are only available until the expiration date set in Encompass. The milestone on the Client List displays a yellow warning for clients with an expired letter (Figure 146). The Clint Profile updates with a **Pre-approval letter has expired** message (Figure 147) when a letter expires and a field that allows the user to contact their loan officer to generate a new letter.

Pre-Approval letter expiration dates vary in the following ways:
- Initial Pre-Approval letters expire 60 days after the Approved Date.
- AZ Pre-Approval letters expire on the manually set date in Encompass.
- All other Pre-Approval letters expire on the date populated in Encompass.
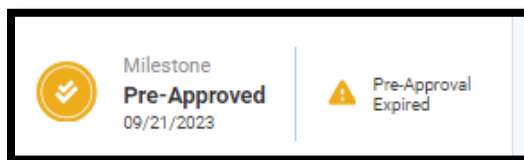
Figure 146 - Pre-Approved Milestone – Expired

Figure 147 - Expired Pre-Approval Client Profile – Typical

The following procedures can be performed at the Pre-Approved milestone:
- Editing a Pre-Approval Letter
- Printing a Pre-Approval Letter
- Printing a Pre-Approval Letter
- Downloading a Pre-Approval Letter

Editing a Pre-Approval Letter

📋 **Note: Editing a pre-approval letter is only possible while the client is at the Pre-Approved milestone with a current pre-approval letter.**

Perform the following steps to edit a pre-approval letter:
1. Navigate to the appropriate **Client Profile**. The **Pre-Approved** section displays (Figure 148) under the Loan Milestone Tracker.

Figure 148 - Pre-Approved Section

2. Enter the address of the subject property (Figure 148).

📝 **Note: The adjusted amount must be equal to or lower than the approved amount (Figure 149).**

3. Enter the appropriate amount into the **Approved Purchase Price** field (Figure 149).

Figure 149 - Pre-Approval Section – Edit the Pre-Approval Amount Field

4. Select the **Save Changes** button (Figure 149).

Viewing a Pre-Approval Letter

Perform the following steps to view and print a pre-approval letter:

📝 **Note: Viewing a pre-approval letter in the NAF Connect platform is only possible for clients with a valid pre-approval letter.**

1. Navigate to the appropriate **Client Profile**. The **Pre-Approved** section displays (Figure 148) under the Loan Milestone Tracker.
2. Select the **View** button (Figure 148). The **Pre-Approval Letter** preview displays (Figure 150).
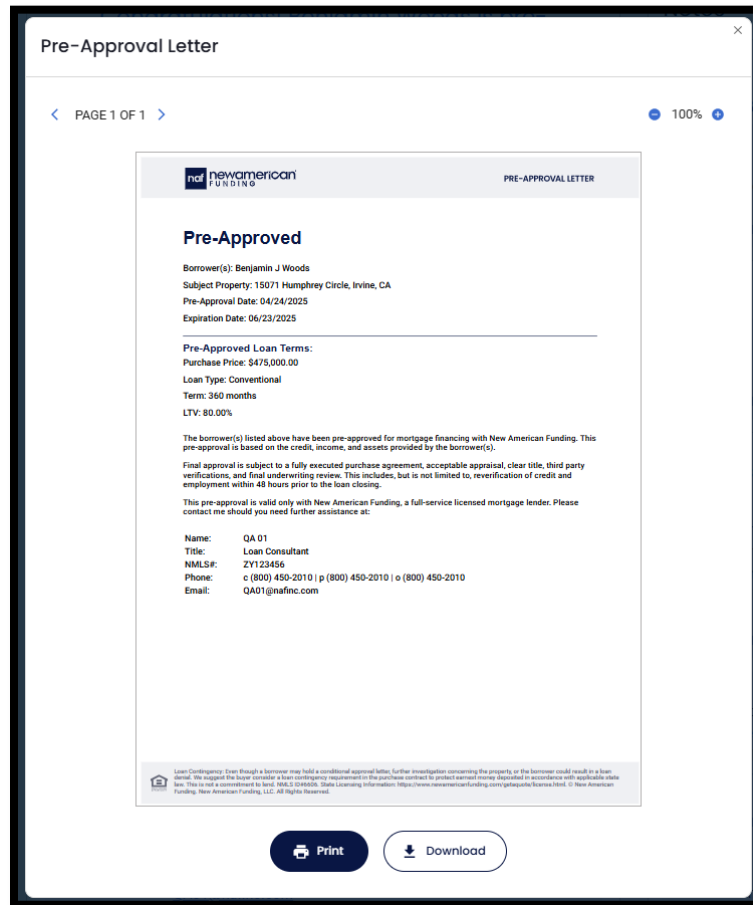
Figure 150 - Pre-Approval Letter – Preview

Printing a Pre-Approval Letter

📋 **Note: Printing a pre-approval letter in the NAF Connect platform is only possible from the Pre-Approval Letter Preview.**

Perform the following tasks to view and print a pre-approval letter:
1. Navigate to the appropriate **Client Profile**. The **Pre-Approved** section displays (Figure 148) under the Loan Milestone Tracker.
2. Select the **View** button (Figure 148). The **Pre-Approval Letter** preview displays (Figure 150)
3. Select the **Print** button (Figure 150). The system print options display (Figure 151).

Figure 151 - System Print Options - Typical

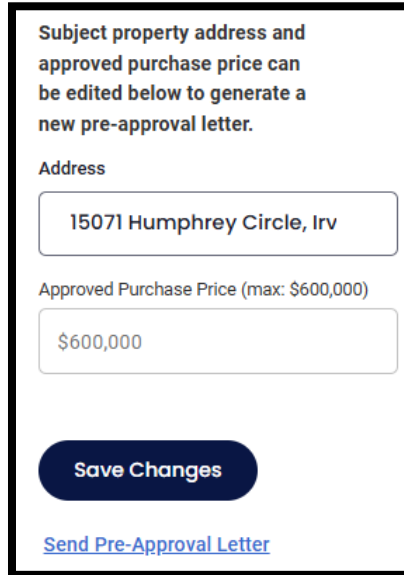4. Select the **Print** button (Figure 151).

Downloading a Pre-Approval Letter

📋 **Note: Downloading a pre-approval letter is only possible while the client is at the Pre-Approved milestone.**

Perform the following tasks to download a pre-approval letter:
1. Select the **Clients** button (Figure 30) from the Navigation Menu.
2. Navigate to the appropriate **Client Profile** (see). The **Pre-Approved** section displays (Figure 148).
3. Select the **Download** button (Figure 149). The pre-approval letter saves to the system default location (Figure 152).
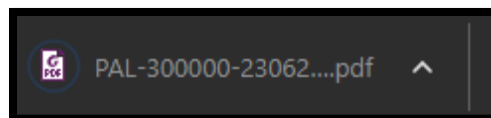
Figure 152 - Pre-Approval Section – Downloaded Pre-Approval Letter

Submitted to Underwriting Milestone

The **Submitted to Underwriting** milestone (Figure 153) generates the **Loan Conditions** section in the Client Profile. Clients at Submitted to Underwriting milestone may receive loan conditions that need to be completed prior to loan funding. The Loan Conditions

section (see Loan Conditions) displays loan condition information if the client has consented to share.
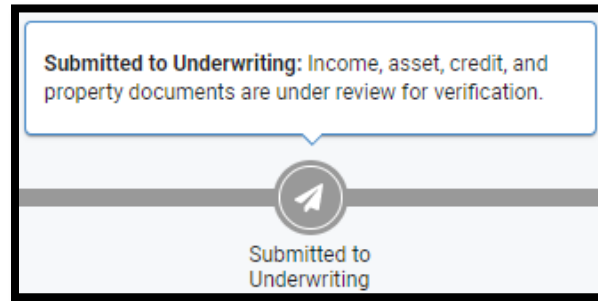
Figure 153 - Loan Milestone – Submitted to Underwriting Explanation

Loan Conditions

📋 **Note: Loan Conditions are only accessible for clients currently at the Submitted to Underwriting milestone.**

The Loan Conditions screen (Figure 154) displays relevant loan condition information to the user. Loan conditions can be categorized using the following classification:
- Income Conditions
- Property
- Asset
- Credit
- Other
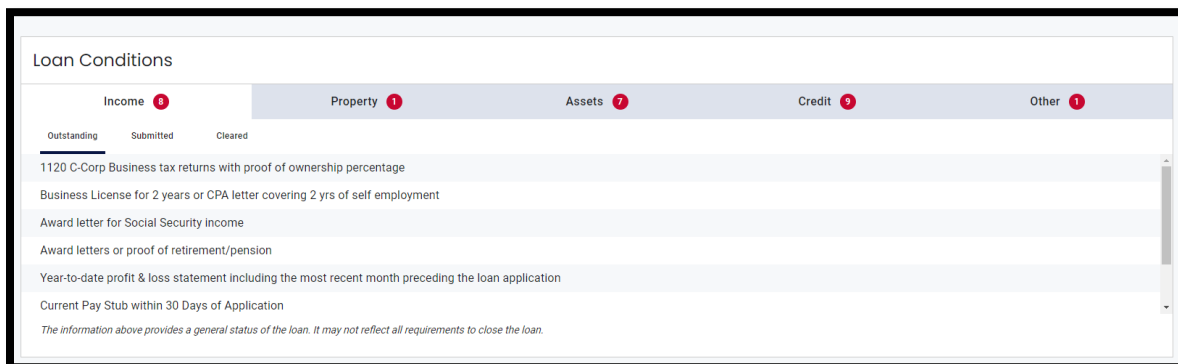
Figure 154 - Loan Conditions – Income Conditions

See **Table 2** below for loan condition statuses and descriptions.

Table 2 - Loan Conditions Descriptions

Loan Condition Status	Description
Outstanding	**Outstanding** conditions must be completed by the client.
Submitted	**Submitted** conditions have been submitted by the client but not reviewed by the underwriter.
Cleared	**Cleared** conditions have been approved by the underwriter.

Income Conditions

The Loan Conditions screen displays **Income** conditions (e.g., uploading a pay stub) (Figure 154) by default.

Property Conditions

Selecting the **Property** conditions button (Figure 155) displays loan conditions associated with the property (e.g., Roof Renovations).

Figure 155 - Loan Conditions – Property Conditions

Asset Conditions

Selecting the **Asset** conditions button (Figure 156) displays loan conditions associated with the client assets (e.g., uploading bank statements).

Figure 156 - Loan Conditions – Asset Conditions

Credit Conditions

Selecting the **Credit** conditions button (Figure 157) displays loan conditions associated with the client credit (e.g., paying off student loans).

Figure 157 - Loan Conditions – Credit Conditions

Other Conditions

Selecting the **Other** conditions button (Figure 157) displays loan conditions that do not fit into other categories (e.g., uploading a copy of Trust Certification).

Figure 158 - Loan Conditions – Other Conditions

Conditionally Approved Milestone

The **Conditionally Approved** milestone (Figure 159) displays on the Loan Milestones Tracker when the underwriter conditionally approves a loan. Lenders assign loan conditions to clients at the Conditionally Approved milestone, which must be fulfilled before funding the loan.

Figure 159 - Loan Milestone – Conditionally Approved Explanation

Final Review Milestone

The **Final Review** milestone (Figure 160) displays on the Loan Milestones Tracker when NAF is reviewing a loan. Clients at the Final Review milestone may be assigned more conditions or be cleared to close.
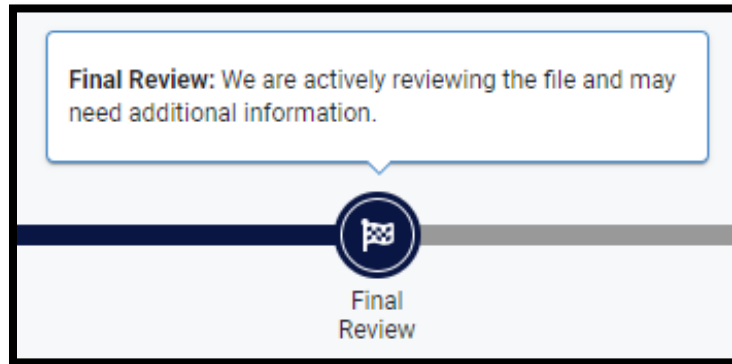
Figure 160 - Loan Milestone – Final Review Explanation

Cleared to Close Milestone

The **Cleared to Close** milestone (Figure 161) displays on the Loan Milestones Tracker when the client clears all loan conditions, the loan is approved to close, and the client can move forward in the loan process. The Client Profile displays important loan information (Figure 162) before the loan funds (e.g., the closing location and the settlement services contact).
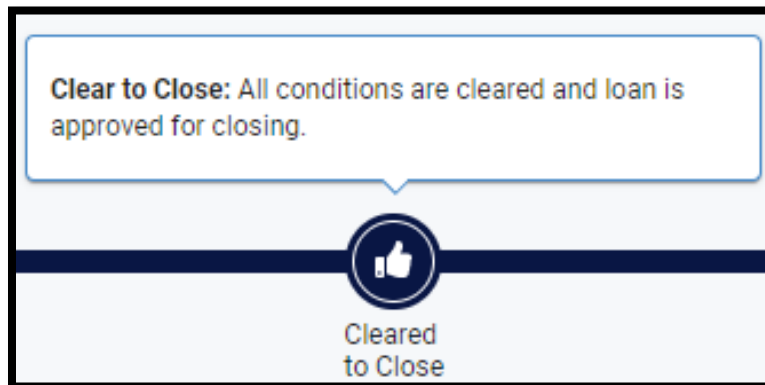
Figure 161 - Loan Milestone – Cleared to Close Explanation
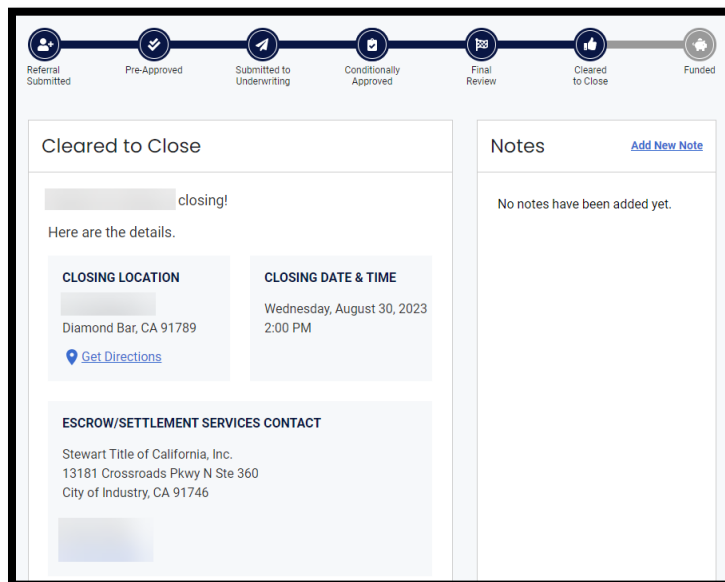
Figure 162 - Cleared to Close – Typical

Funded Milestone

The **Funded** milestone (Figure 163) displays on the Loan Milestones Tracker when the client loan application is funded and closed.
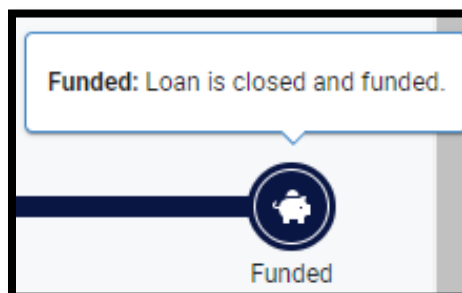
Figure 163 - Loan Milestone – Funded Explanation

Loan Canceled Milestone

The **Loan Canceled** milestone (Figure 164) displays on the Loan Milestones Tracker when the loan application of the client is canceled. Both the potential borrower and the underwriter can cancel a loan. The loan officer associated with the loan can be contacted for more information.
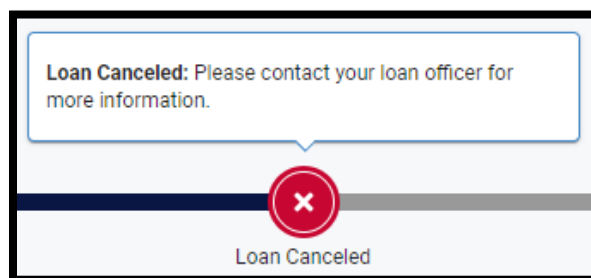
Figure 164 - Loan Milestone – Loan Canceled Explanation

Client Notes

The Client **Notes** section (Figure 165) is located on the right side of the Client Profile and displays all notes the user or the loan officer has associated with the client. Notes can be shared with the loan officer associated with the client.
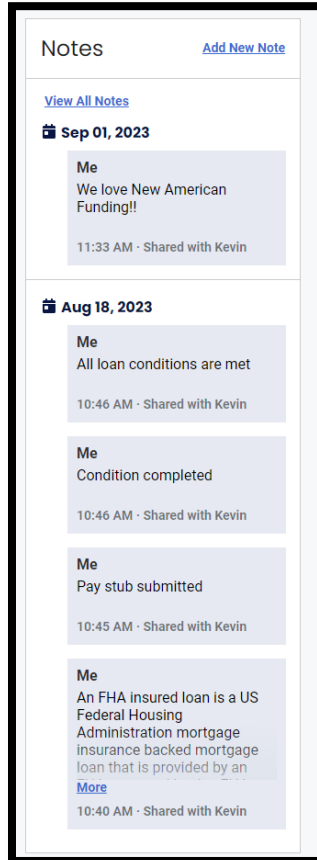
Figure 165 - Client Notes Section – Typical

The **Add Note** button (Figure 165) located at the top of the Client Notes section opens the Add a New Note pop-up (Figure 166). The Add Note button allows users to create new notes (see Adding a Note).

Figure 166 - Add A New Note Pop-up – Typical

The **View All Notes** button (Figure 165) opens the Notes pop-up (Figure 167). The Notes pop-up displays all notes associated with the client that the user or the loan officer have created.

Figure 167 - Notes Pop-up – Typical

Adding a Note

Perform the following steps to add a note to a client profile:
1. Navigate to the appropriate Client Profile (see Client Profile).
2. Select the **Add New Note** button (Figure 165). The Add New Note Pop-up displays (Figure 166).
3. Enter the desired note into the **Note** field (Figure 166).
4. Select the **Share note** checkbox if appropriate.

5. Select the **Save Note** button (Figure 166). The note displays in the Client Notes section (Figure 165).

Calling a Client

Perform the following tasks to call a client:
1. Select the Clients button from the **Navigation Menu** (Figure 30).
2. Navigate to the appropriate **Client Profile** (Figure 140).
3. Select the client phone number underneath the client name (Figure 168). The **Dialing Options** display (Figure 169).
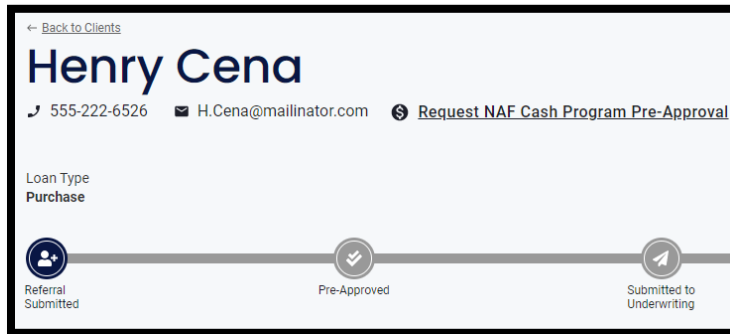
Figure 168 - Client Profile – Client Contact Information
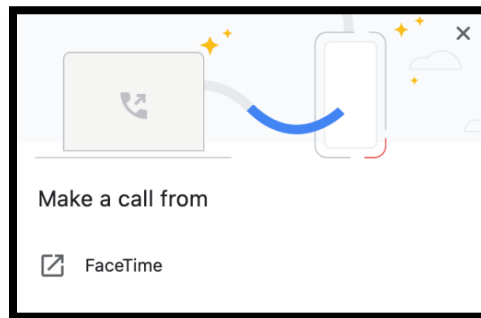
Figure 169 - System Dialing Options

4. Select the appropriate option to call the client (Figure 169).

Emailing a Client

Perform the following steps to email a client:
1. Select the Clients button from the Navigation Menu.
2. Navigate to the appropriate **Client Profile** (Figure 140).
3. Select the client email address (Figure 168). The system-preferred email system displays (Figure 170).
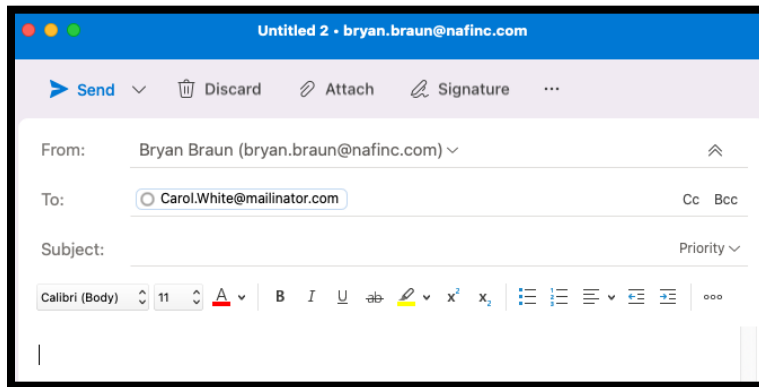
Figure 170 - Blank Email Message

4. Type the appropriate information and message into the appropriate textboxes (Figure 170).
5. Select the **Send** button (Figure 170).

Document Review Requirements

This document must be reviewed no less than annually or at such time regulation changes should impact its content. All changes to this procedure must be approved by Department/Owner.

Table 3 - Document Revision History

| Effective Date	Author	Business Owner	Revisions/Review
01/01/23	Alisa Atkinson	Fjori Narazani	Template and outlining
01/15/23	Tristan Perona	Fjori Narazani	Creation
04/24/23	Tristan Perona	Fjori Narazani	Added profile indicator, updated screenshots
06/10/23	Tristan Perona	Fjori Narazani	Added prequal letters and new Refer A Client page
08/08/23	Tristan Perona	Fjori Narazani	Updated screenshots, added social log in
09/01/23	Tristan Perona	Fjori Narazani	Updated screenshots, added Notes, removed PreQual and associated verbiage, added Final Review milestone, and added Facebook SSI
09/29/23	Tristan Perona	Fjori Narazani	Updated screenshots, added marketing panel in Profile section, updated Navigation menu terminology
10/12/23	Tristan Perona	Fjori Narazani	Updated screenshots, added Marketing Collateral screen and associated features
11/10/23	Tristan Perona	Fjori Narazani	Updated screenshots, added Feedback section, and Refer a Client in the navigation menu
11/27/23	Tristan Perona	Fjori Narazani	Updated screenshots, added the resources page, reorganized marketing page, help page, and PAL approval screen, moved Help Page header
12/04/23	Tristan Perona	Derek Orona	Updated screenshots, blurs, and new caption style
01/08/24	Tristan Perona	Derek Orona	Updated resource center, PAL screenshots, and caption style
02/05/24	Tristan Perona	Derek Orona	Updated resource center, Refer a Client screenshots
02/08/24	Tristan Perona	Derek Orona	Added copyright footer, updated font, and fixed header spacing
04/08/24	Tristan Perona	Derek Orona	Updated header styles, pagination
07/02/24	Tristan Perona	Christian Walthers	Updated document revision history location, removed Request Consent verbiage

Effective Date	Author	Business Owner	Revisions/Review
07/11/24	Tristan Perona	Christian Walthers	Added expired PAL content
07/19/24	Tristan Perona	Christian Walthers	Added automatic log out, We're Local, favorite button
08/30/24	Tristan Perona	Christian Walthers	Moved document revision table to the end of the manual, changed the spacing of the title page
09/09/24	Gokul R	Christian Walthers	Updated editorial changes
01/14/25	Tristan Perona	Christian Walthers	Added changes to Resource Center
05/08/25	Tristan Perona	Robin Rosenberg	Added Builder changes
05/23/25	Tristan Perona	Robin Rosenberg	Updated screenshots, headers, and formatting
05/28/25	Gokul R	Robin Rosenberg	Editorial Review

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