

naconnect USER GUIDE

Abstract

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

Audience

NAF Connect Users

Table of Contents

How to Use 10

 Notes 10

Chapter 1: General Information 11

 Introduction 12

 Commonly Used Sections 12

 NAF Connect Login Page 12

 Dashboard 13

 Client List 15

 Client List Filters 15

 Filter Button 16

 Filters Search Bar 16

 Filters Drop-Down Menu and Order Button 16

 Dashboard Features 17

 Refer a Client Button 18

 Navigation Menu 19

 Refer a Client Navigation Button 20

 User Name and Image 20

 Profile Indicator 20

 Clients Button 21

 Marketing Button 21

 Settings Drop-Down List 21

 Help Button 21

 Marketing Collateral 22

 Marketing Collateral Creation Screen 22

 Co-Branding Agreement 24

 Create Marketing Materials 24

 Resource Center 29

 NAF Cash Page 30

 Co-Branding Page 30

 NAF Pathway Page 31

 14-Day Close Guarantee Page 31

 NAF Concierge Page 32

NAF Insurance Page.....	32
UQUAL Page	33
Settings.....	34
Profile Settings	34
Loan Officer Settings.....	36
Communications Settings.....	37
Navigate to Profile Settings	37
Update Profile Picture.....	37
Update Company Logo	39
Update Company Information	41
Update Personal Information	42
Update Real Estate License	43
Update Mailing Address	44
Change Password	45
Navigate to the Loan Officers Settings	46
Add a Preferred Loan Officer.....	46
Remove a Preferred Loan Officer.....	48
Navigate to the Communications Settings	48
Update Email Subscription Preferences	48
Help Page	50
Training Button	50
User Guide Button.....	51
FAQ Button.....	51
Sign Out Button.....	51
Feedback Button.....	51
Chapter 2: Enrollment and Login	52
Enrollment	53
Enroll for a NAF Connect Account with Email.....	53
Enroll for a NAF Connect Account with Social Sign In	54
Login	56
Log into NAF Connect with Email.....	56
Log into NAF Connect with Social Sign In.....	57
Chapter 3: Features	59

Clients.....	60
Client Profile	60
Loan Milestones.....	61
Referral Submitted Milestone	61
Pre-Approved Milestone.....	62
Edit a Pre-Approval Letter	63
View a Pre-Approval Letter	64
Print a Pre-Approval Letter	65
Download a Pre-Approval Letter.....	65
Submitted to Underwriting Milestone.....	65
Loan Conditions	66
Income Conditions.....	67
Property Conditions.....	67
Asset Conditions.....	68
Credit Conditions	68
Other Conditions.....	68
Requesting Client Consent to View Loan Conditions.....	69
Conditionally Approved Milestone.....	70
Final Review Milestone.....	70
Cleared to Close Milestone	71
Funded Milestone	71
Loan Canceled Milestone.....	72
Client Notes	72
Add a Note.....	74
Refer a Client.....	74
Call a Client	80
Email a Client.....	81

List of Figures

Figure 1 NAF Connect Login Page 1 of 2	12
Figure 2 NAF Connect Login Page 2 of 2	13
Figure 3 NAF Connect Dashboard	13
Figure 4 Dashboard – No Clients	14
Figure 5 Dashboard – Client List	15
Figure 6 Client List Filters	15
Figure 7 Client List Filters – Filter Button.....	16
Figure 8 Filters Search Bar – Typical.....	16
Figure 9 Filters Drop-Down Menu and Order Button.....	17
Figure 10 UI Buttons – Refer a Client Button	17
Figure 11 Navigation Menu.....	17
Figure 12 Feedback Button.....	18
Figure 13 Refer A Client Page.....	18
Figure 14 Navigation Menu Hamburger Button – Desktop (Left), Mobile (Right)	19
Figure 15 Navigation X Button – Desktop (Left), Mobile (Right)	19
Figure 16 Mobile Navigation Menu – Typical	20
Figure 17 Profile Indicator – Incomplete Profile.....	20
Figure 18 Settings – Drop-Down Menu	21
Figure 19 Marketing Collateral – Typical	22
Figure 20 Marketing Collateral Creation Screen – Typical.....	23
Figure 21 Incomplete Profile Warning Message	24
Figure 22 Co-Branding Agreement – 9-6-23	24
Figure 23 Marketing Button – Navigation Menu.....	25
Figure 24 Marketing Collateral Creation Screen – Typical.....	25
Figure 25 State Drop-Down Menu.....	26
Figure 26 Select A Preferred Loan Officer – Typical	26
Figure 27 Search For A Loan Officer By Name Or NMLS ID Button.....	27
Figure 28 Loan Officer Search Bar	27
Figure 29 Loan Officer Search Options – Typical.....	27
Figure 30 Download Button – Typical	27
Figure 31 Browser PDF Reader – Typical	28
Figure 32 Resource Center.....	29
Figure 33 Resource Center Hover Cards – Typical.....	29
Figure 34 NAF Cash Page	30
Figure 35 Co-Branding Page	30
Figure 36 NAF Pathway Page	31
Figure 37 NAF 14-Day Close Guarantee Page	31
Figure 38 NAF Concierge Resource Page	32
Figure 39 NAF Insurance Resource Page	32
Figure 40 UQUAL Resource Page	33
Figure 41 Profile Settings – Finished Profile – Typical.....	34
Figure 42 Profile Settings – Incomplete Profile Warning.....	35
Figure 43 Incomplete Profile Warning – Typical	35
Figure 44 Profile Settings – Save Changes Button	35
Figure 45 Loan Officer Settings	36

Figure 46 Communications Settings.....	37
Figure 47 Profile Picture Section – Update Button.....	38
Figure 48 Profile Picture Section – Drop File Here Area	38
Figure 49 File Explorer – Mac.....	38
Figure 50 File Explorer – Windows.....	39
Figure 51 Profile Picture Section – Save Changes Button.....	39
Figure 52 Company Logo Section – Update Button	40
Figure 53 Company Logo Section – Drop File Here Area.....	40
Figure 54 File Finder – Company Logo Image.....	40
Figure 55 File Finder – Windows	41
Figure 56 Company Logo Section – Save Changes Button	41
Figure 57 Company Information Section	42
Figure 58 Company Information Section – Save Changes Button Active.....	42
Figure 59 Personal Information Section – Typical	43
Figure 60 Personal Information Section – Save Changes Button Active.....	43
Figure 61 Real Estate License Section – Typical.....	44
Figure 62 Mailing Address Section – Typical	44
Figure 63 Password Section – Typical.....	45
Figure 64 Password Section – Save Changes Button Active.....	45
Figure 65 Loan Officer Search Box.....	46
Figure 66 Loan Officer Search Box – Loan Officer Drop-Down	46
Figure 67 Loan Officer Search Box – Active Add Loan Officer Button.....	47
Figure 68 Loan Officer Page – Preferred Loan Officer(s) Displayed.....	47
Figure 69 Your Preferred Loan Officer(s) Section	48
Figure 70 Email Subscription Preferences Section	49
Figure 71 Email Subscriptions Preferences Section – Save Changes Button Active.....	49
Figure 72 Help Section	50
Figure 73 NAF Connect Training Calendly	50
Figure 74 FAQ Page.....	51
Figure 75 Feedback Pop-up	51
Figure 76 NAF Connect URL	53
Figure 77 Create an Account for NAF Connect – Step 1	53
Figure 78 Verification Screen – Typical	54
Figure 79 3rd Party Social Sign In – Typical	55
Figure 80 3rd Party Sign In Page – Typical.....	55
Figure 81 Real-time Alerts Pop-up.....	56
Figure 82 NAF Connect Log In Screen	57
Figure 83 Additional Permissions Pop-up – Typical	58
Figure 84 Client Profile.....	60
Figure 85 Client Profile – Loan Milestone Tracker.....	61
Figure 86 Loan Milestone – Referral Submitted Explanation	61
Figure 87 Loan Milestone – Pre-Approved	62
Figure 88 Expired Pre-Approval Letter – Typical	62
Figure 89 Pre-Approved Section	63
Figure 90 Pre-Approval Section – Edit the Pre-Approval Amount Field	64
Figure 91 Pre-Approval Letter – Preview	64

Figure 92 Pre-Approval Section – Downloaded Pre-Approval Letter.....	65
Figure 93 Loan Milestone – Submitted to Underwriting Explanation.....	66
Figure 94 Loan Conditions Section – Request Consent.....	66
Figure 95 Loan Conditions – Income Conditions	67
Figure 96 Loan Conditions – Property Conditions	67
Figure 97 Loan Conditions – Asset Conditions	68
Figure 98 Loan Conditions – Credit Conditions.....	68
Figure 99 Loan Conditions – Other Conditions	68
Figure 100 Client Consent Pop-Up	69
Figure 101 Success Notification – Request Consent	69
Figure 102 Borrower Notification Email – Loan Conditions Consent	70
Figure 103 Loan Milestone – Conditionally Approved Explanation.....	70
Figure 104 Loan Milestone – Final Review Explanation.....	70
Figure 105 Loan Milestone – Cleared to Close Explanation	71
Figure 106 Cleared To Close – Typical	71
Figure 107 Loan Milestone – Funded Explanation	72
Figure 108 Loan Milestone – Loan Canceled Explanation.....	72
Figure 109 Client Notes Section – Typical.....	73
Figure 110 Add A New Note Pop-up – Typical	73
Figure 111 Notes Pop-up – Typical.....	74
Figure 112 Refer A Client Page.....	75
Figure 113 Select A Loan Officer – Refer A Client Page – Typical.....	76
Figure 114 Search for a Loan Officer – Typical	76
Figure 115 Get Matched to a Loan Officer Radio Button	77
Figure 116 Get Matched to a Spanish-speaking Loan Officer Radio Button.....	77
Figure 117 Enter Additional Information Field	77
Figure 118 Successfully Referred Toast Message – Typical.....	78
Figure 119 User Notification Email – Referral Submitted	78
Figure 120 Loan Officer Notification Email – New Lead.....	79
Figure 121 Borrower Notification Email – Known Loan Officer.....	79
Figure 122 Borrower Notification Email – Compatible Loan Officer	80
Figure 123 NAF Cash Confirmation Email	80
Figure 124 Client Profile – Client Contact Information	81
Figure 125 System Dialing Options	81
Figure 126 Blank Email Message	81

List of Tables

Table 1 List of Acronyms	8
Table 2 Loan Conditions Descriptions	67

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

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.

Document Revision History:

Effective Date	Author	Business Owner	Revisions/Review
1/1/23	Alisa Atkinson	Fjori Narazani	Template and outlining
1/15/23	Tristan Perona	Fjori Narazani	Creation
4/24/23	Tristan Perona	Fjori Narazani	Added profile indicator, updated screenshots
6/10/23	Tristan Perona	Fjori Narazani	Added prequal letters and new Refer A Client page
8/8/23	Tristan Perona	Fjori Narazani	Updated screenshots, added social log in
9/1/23	Tristan Perona	Fjori Narazani	Updated screenshots, added Notes, removed prequal, added Final Review milestone, added Facebook SSI
9/29/23	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
12/4/23	Tristan Perona	Derek Orona	Updated screenshots, blurs, and new caption style
1/8/24	Tristan Perona	Derek Orona	Updated resource center, PAL screenshots, and caption style
2/5/24	Tristan Perona	Derek Orona	Updated resource center, Refer a Client screenshots
2/8/24	Tristan Perona	Derek Orona	Added copyright footer, updated font, and fixed header spacing
4/8/24	Tristan Perona	Derek Orona	Updated header styles, pagination

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 (REA) 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. Contact Support@Naf-Connect.com with any questions or concerns.

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

Commonly Used Sections

The following sections are used commonly in typical workflows:

- Client List
- Create Marketing Materials
- Refer a Client
- Loan Milestones
- Print a Pre-Approval Letter

NAF Connect Login Page

The NAF Connect URL (<https://naf-connect.com/>) directs the user to the NAF Connect Login Page (Figure 1 and Figure 2). The NAF Connect login page details key elements and features of the platform (Figure 2). Selecting the **Get Started** button in the middle of the page begins the enrollment process (see **Enroll for a NAF Connect Account**).

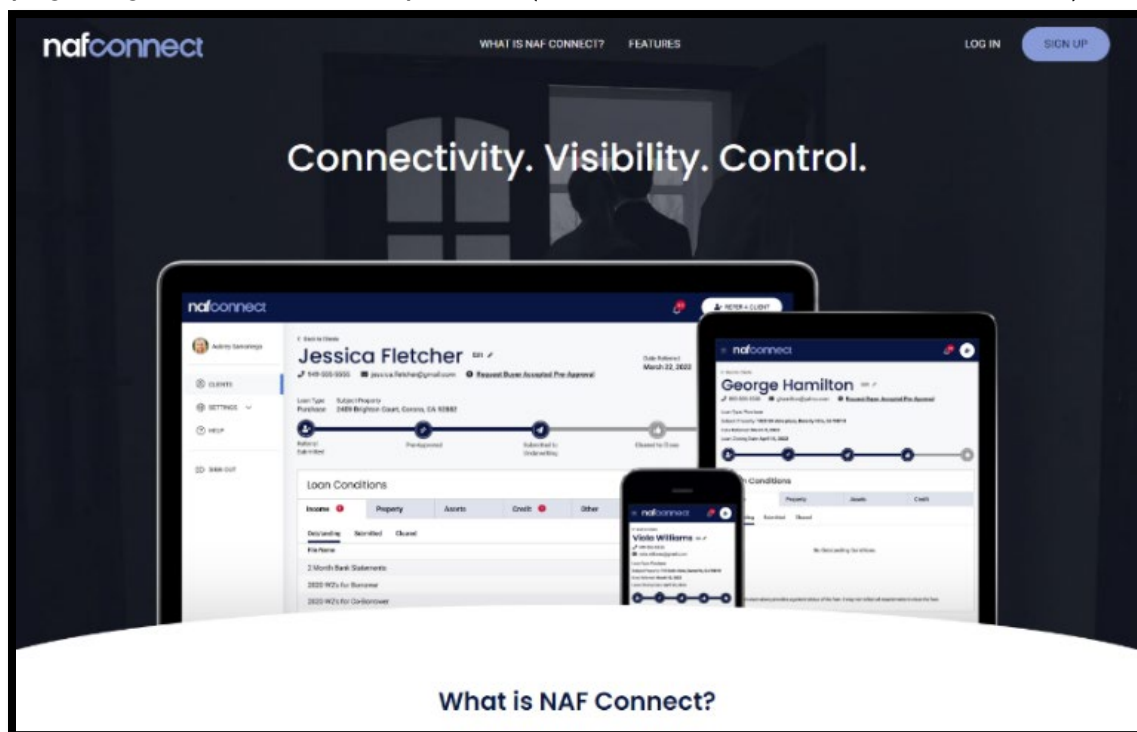


Figure 1 NAF Connect Login Page 1 of 2

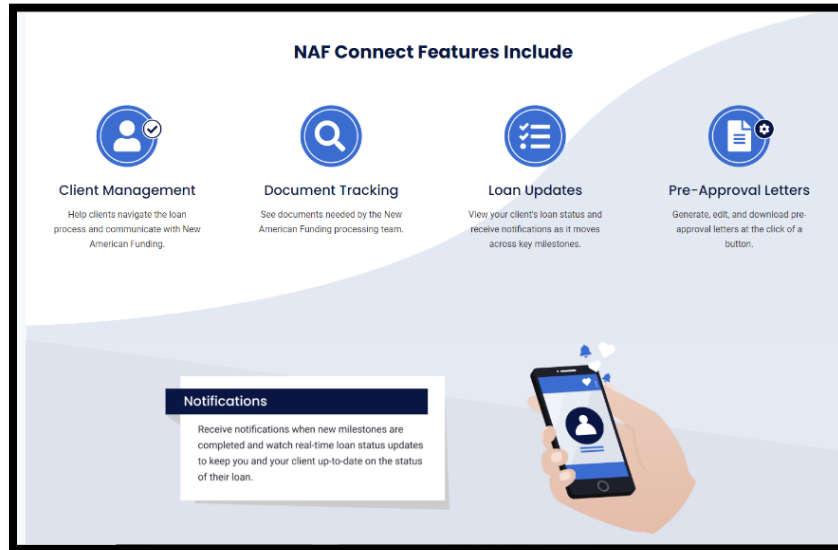


Figure 2 NAF Connect Login Page 2 of 2

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. The Dashboard is comprised of the **Client List** and **User Interface (UI) Navigation buttons** (see Client List and Dashboard). The Client List displays an overview of each client. Selecting anywhere in a client row opens the **Client Profile** (see Client Profile).

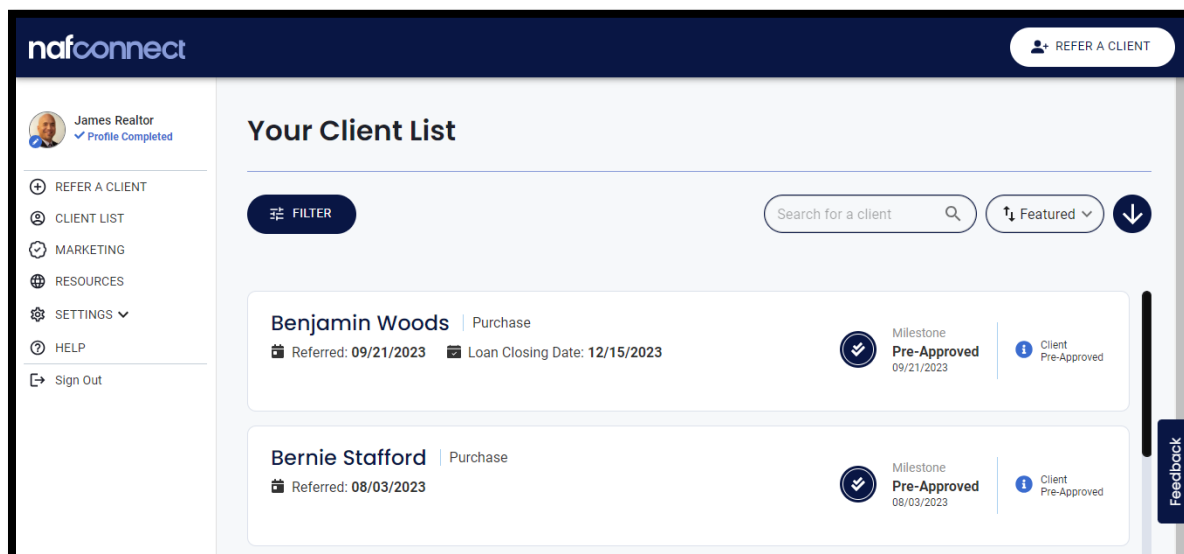


Figure 3 NAF Connect Dashboard

Note: Users without clients in any NAF products will see the Refer A Client button (Figure 4) instead of the Client List.

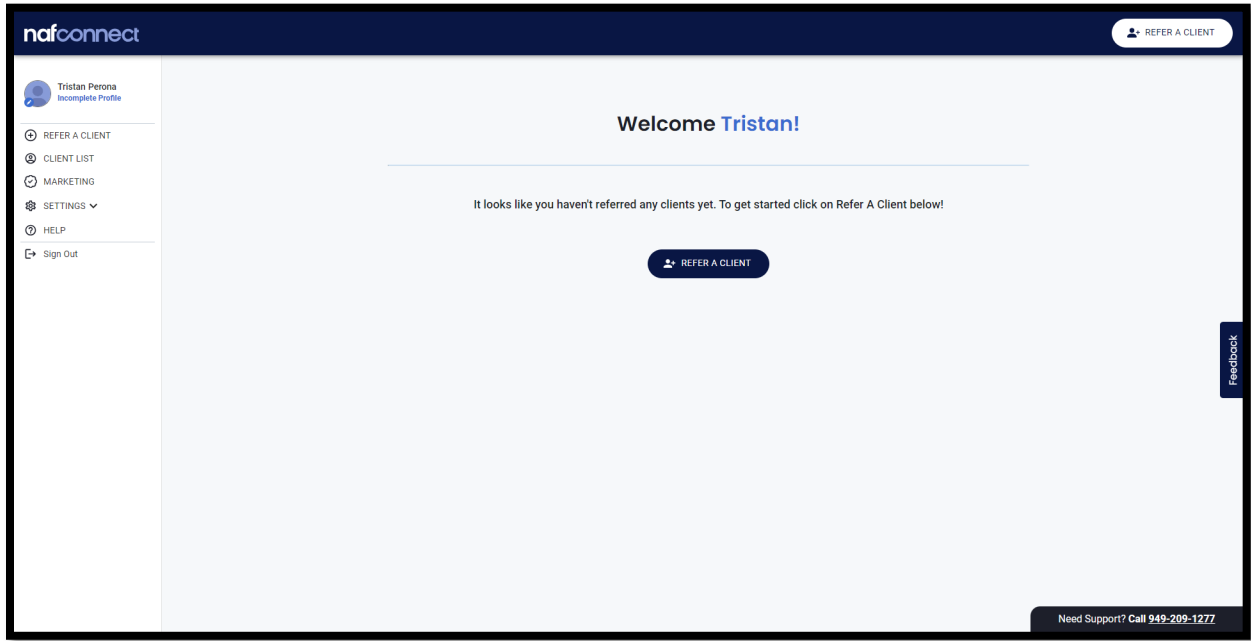


Figure 4 Dashboard – No Clients

Client List

The **Client List** (Figure 5) displays high-level client information. Selecting anywhere in a client row opens the **Client Profile** (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

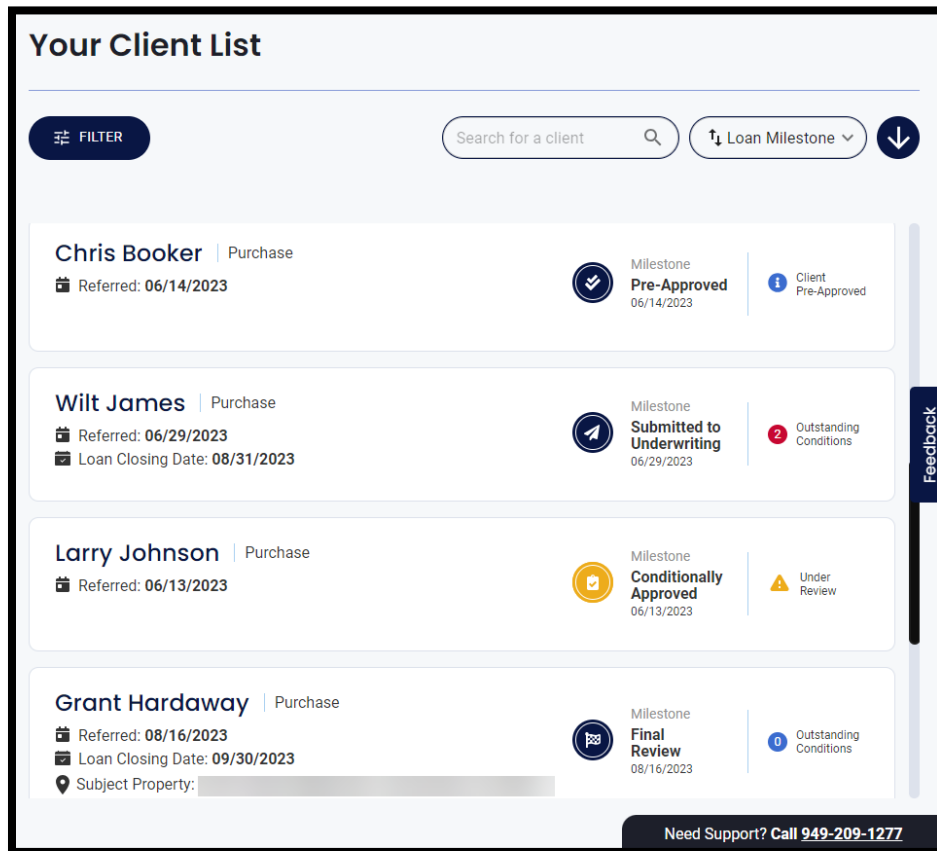


Figure 5 Dashboard – Client List

Client List Filters

The **Client List Filters** (Figure 6) allows the user to filter the Client List to only display specific clients.



Figure 6 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 6) opens the **Filter** drop-down menu of loan milestone options. The menu allows users to select milestones to filter the Client List and only show clients at the selected milestones.

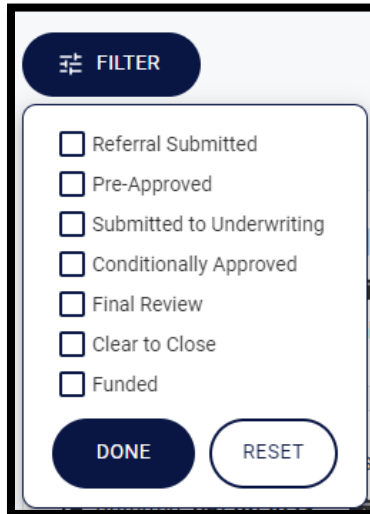


Figure 7 Client List Filters – Filter Button

Selecting the **Done** button (Figure 7) will close the Filter drop-down menu. Selecting the **Reset** button will erase all set checkboxes.

Filters Search Bar

Typing a name into the Search bar (Figure 6) will return any clients with the searched name (Figure 8).

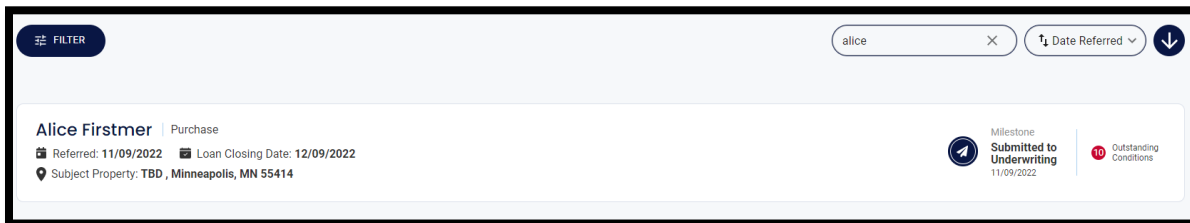


Figure 8 Filters Search Bar – Typical

Filters Drop-Down Menu and Order Button

Selecting the **Filters** drop-down button (Figure 9) displays the **Filters** drop-down 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 if the list is ascending or descending and selecting the button changes the direction.

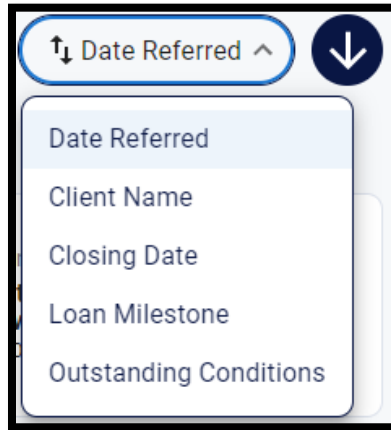


Figure 9 Filters Drop-Down Menu and Order Button

Dashboard Features

The Dashboard features (Figure 10 and Figure 11 and Figure 12) are made up of the following features:

- Refer a Client Button
- Navigation Menu
- Feedback Button

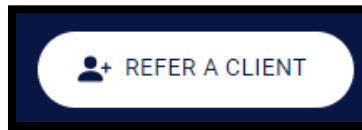


Figure 10 UI Buttons – Refer a Client Button

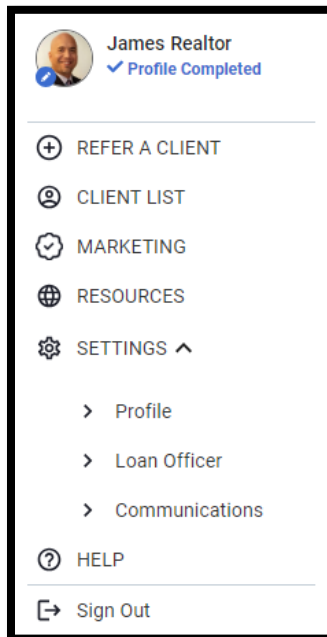


Figure 11 Navigation Menu



Figure 12 Feedback Button

Refer a Client Button

The **Refer a Client** button (Figure 10) is located at the top right side of the Dashboard and generates the **Refer a Client** pop-up (Figure 13). The Refer a Client page is the first step in the referral process (see Refer a Client).

Refer a Client

1 Enter Client Information

State of Transaction *

▼
MI

First Name * Last Name *

Enter First Name

Enter Last Name

Email Address *

Enter Email Address

Cell Phone *

Enter Cell Phone

Would you like your client to be considered for our cash buyer program called [NAF Cash?](#) *

Yes No

2 Select A Loan Officer

Figure 13 Refer A Client Page

Navigation Menu

The Navigation Menu (Figure 11) is located on the left side of the NAF Connect platform on every page. Selecting the following menu buttons allows the user to navigate through NAF Connect:

- Refer a Client
- User Name and Image
- Profile Indicator
- Clients Button
- Settings Drop-Down List
- Help Button
- Sign Out Button

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 14) opens the Navigation Menu. The X button (Figure 15) closes the menu. The Navigation Menu on mobile devices includes the **Refer a Client** button (see Refer a Client) and **Feedback** button at the bottom of the page (Figure 16).

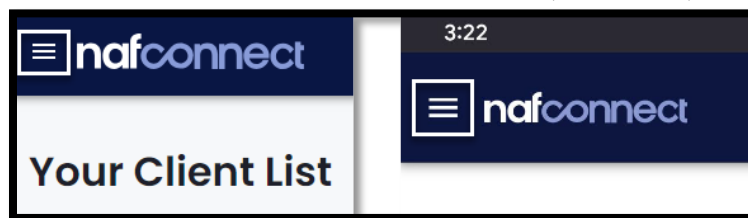


Figure 14 Navigation Menu Hamburger Button – Desktop (Left), Mobile (Right)



Figure 15 Navigation X Button – Desktop (Left), Mobile (Right)

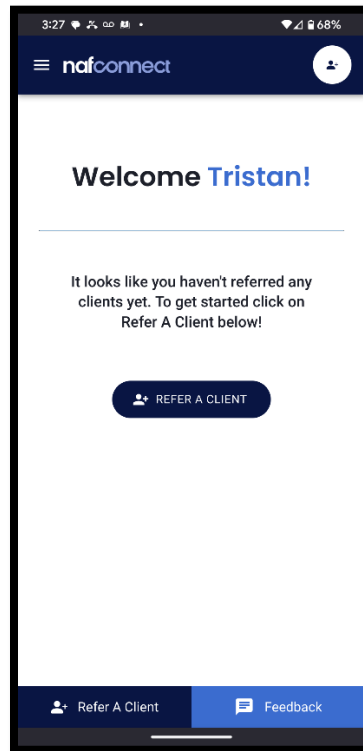


Figure 16 Mobile Navigation Menu – Typical

Refer a Client Navigation Button

The **Refer a Client** button (Figure 11) is located on the left side of the Dashboard and opens the Refer a Client page (see Refer a Client).

User Name and Image

The user name and profile image (Figure 11) displays on the top left side of the Dashboard above the Navigation Menu. Selecting the user name or image opens the **Profile Settings** page (see Profile Settings).

Profile Indicator

The **Profile Indicator** (Figure 17) is located underneath the user name in the Navigation Menu. The Profile Indicator displays the status of the user profile. Upon account creation the Profile Indicator displays **Incomplete Profile** until the user saves the Real Estate License, Mailing Address, and Company Information (see Update Company Information, Update Personal Information, and Update Real Estate License). The Profile Indicator will display **Profile Completed** (Figure 11).

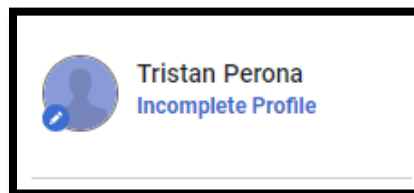


Figure 17 Profile Indicator – Incomplete Profile

Clients Button

The **Clients** button (Figure 11) is located on the left side of the Dashboard and opens the Client List (Figure 3).

Marketing Button

The **Marketing** button (Figure 11) is located on the left side of the Dashboard and opens the Marketing Collateral (Figure 19).

Settings Drop-Down List

The **Settings** drop-down list (Figure 11) is located on the left side of the Dashboard. The Settings drop-down list allows users to select the following settings:

- Profile Settings
- Loan Officer Settings
- Communications Settings

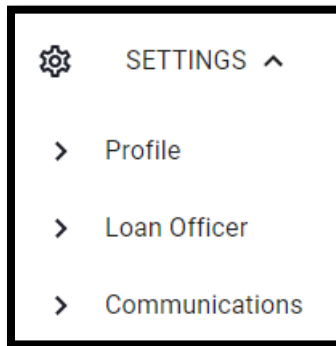


Figure 18 Settings – Drop-Down Menu

Help Button

The **Help** button (Figure 11) is located on the left side of the Dashboard and opens the **Help** page (see Help Page).

Marketing Collateral

 **Note:** Users must fill out profile information to use the Marketing Collateral feature of NAF Connect (see Profile Settings).

The **Marketing Collateral** screen (Figure 19) allows users to create NAF cobranded 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. Selecting a marketing material style opens the Marketing Collateral Creation Screen (Figure 19).

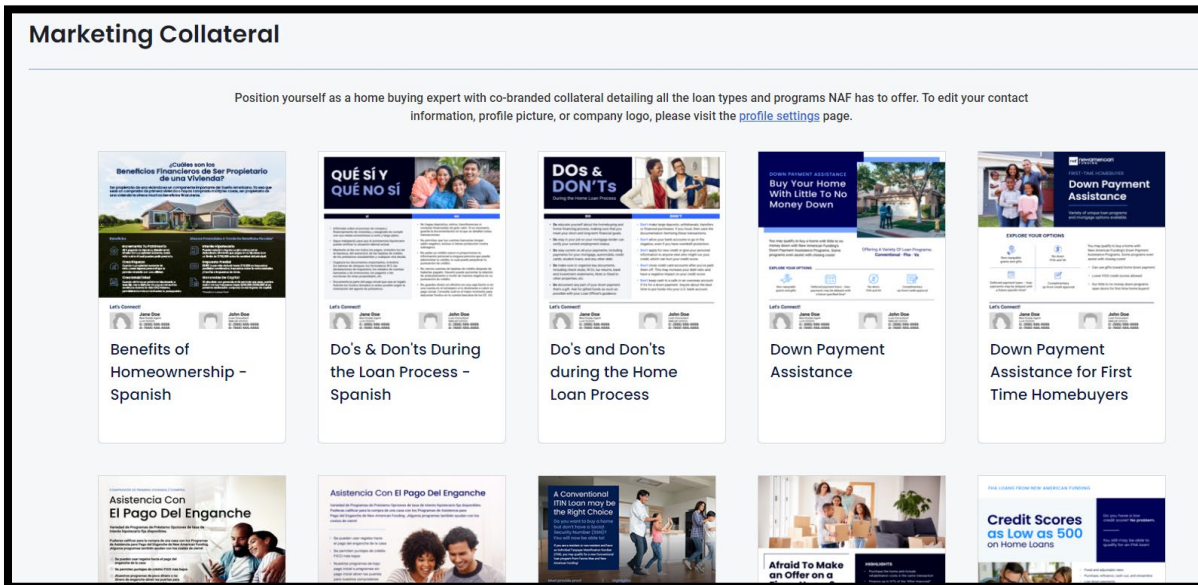


Figure 19 Marketing Collateral – Typical

Marketing Collateral Creation Screen

The **Marketing Collateral Creation** screen (Figure 20) allows users to create cobranded 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 20) at the top of the screen allows users to return to the last page to select a different marketing material to generate. To create marketing materials, the user must enter the following information:

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

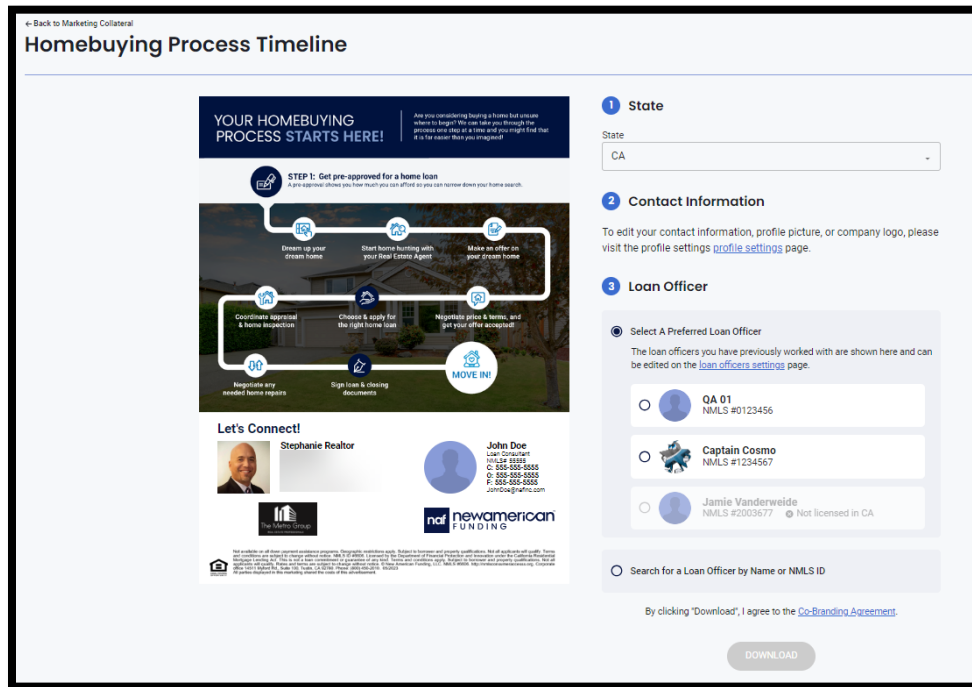



Figure 20 Marketing Collateral Creation Screen – Typical

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

Images are cobranded 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 20) 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 21) displays under the Download button instead of the Co-Branding Agreement message.

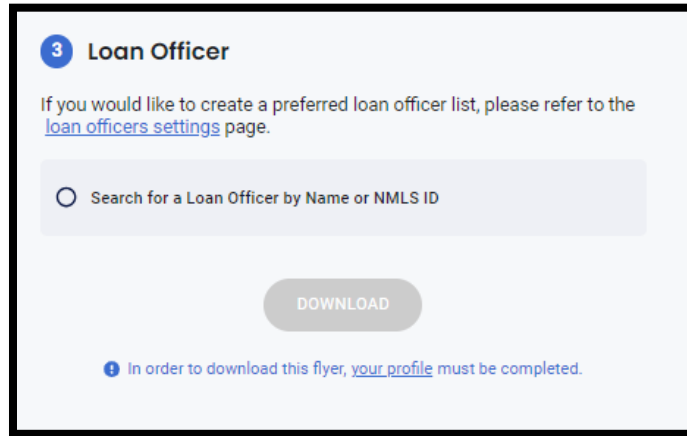


Figure 21 Incomplete Profile Warning Message

Co-Branding Agreement

The Co-Branding Agreement button (Figure 20) opens a new tab to the [NAF Connect Co-Branding Agreement](#) (Figure 22). The Co-Branding Agreement outlines the compliance requirements for downloading and using NAF Connect Co-branded materials.



Figure 22 Co-Branding Agreement – 9-6-23

Create Marketing Materials

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

Perform the following tasks to create marketing materials:

1. Select the **Marketing** button in the Navigation menu (Figure 23). The Marketing Collateral Screen displays (Figure 20).

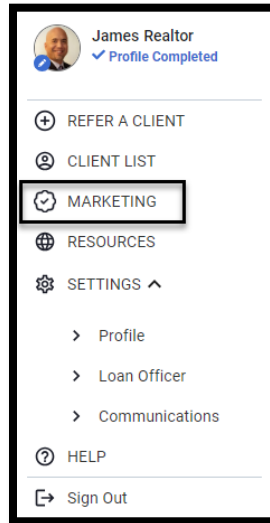


Figure 23 Marketing Button – Navigation Menu

2. Select the desired marketing material (Figure 20). The Marketing Collateral Creation screen displays (Figure 24).

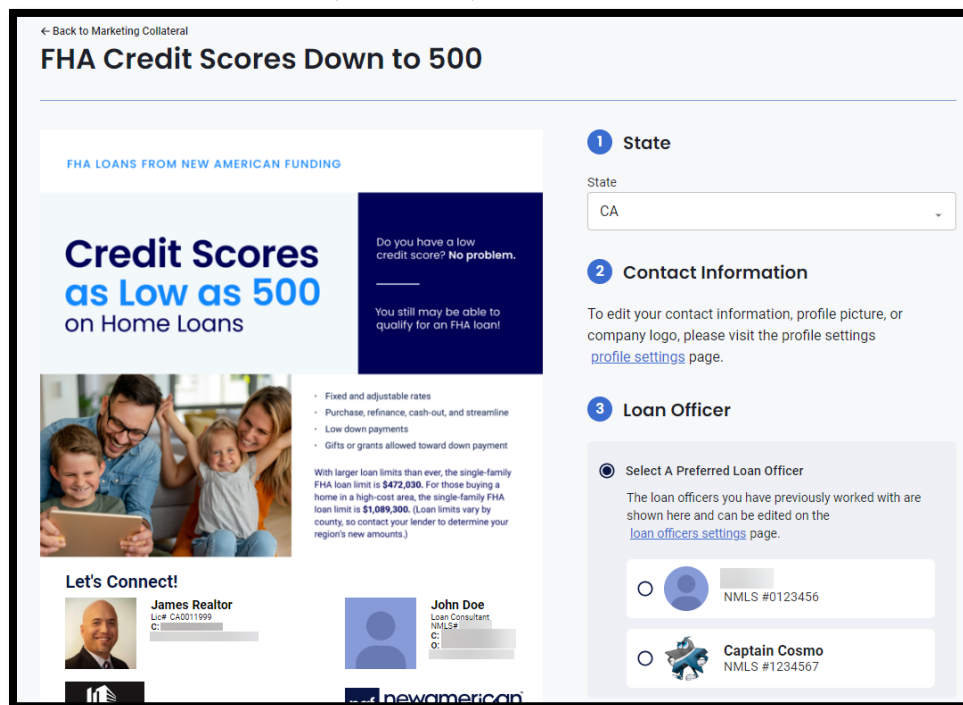


Figure 24 Marketing Collateral Creation Screen – Typical

3. Select the State field (Figure 24). The State drop-down menu displays (Figure 25).

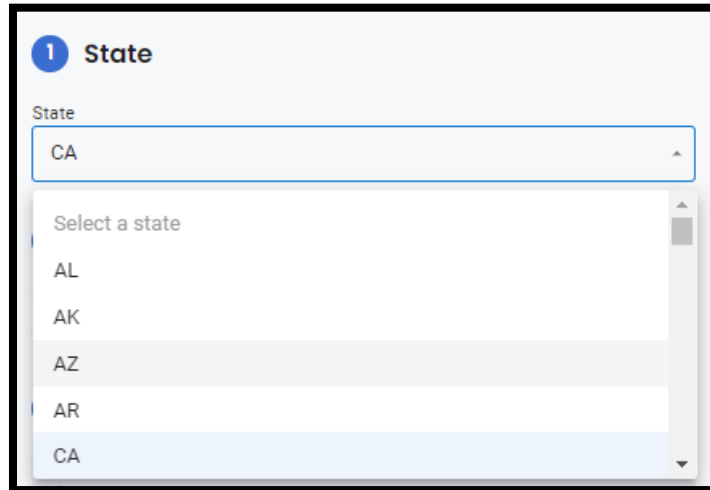


Figure 25 State Drop-Down Menu

4. Select the appropriate state (Figure 25).
5. Perform one of the following steps to select a loan officer:
 - a. Select a preferred loan officer (Figure 26).

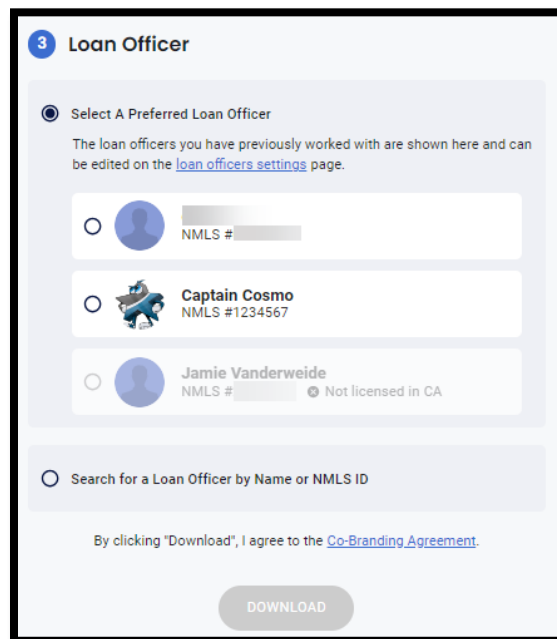


Figure 26 Select A Preferred Loan Officer – Typical

- b. Select the **Search for a Loan Officer by Name or NMLS ID** button (Figure 27). The Loan Officer Search bar displays (Figure 28).

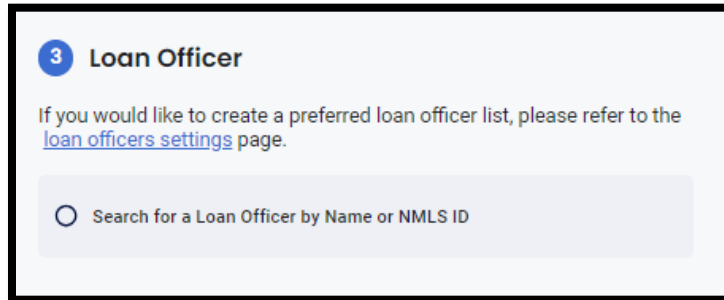


Figure 27 Search For A Loan Officer By Name Or NMLS ID Button

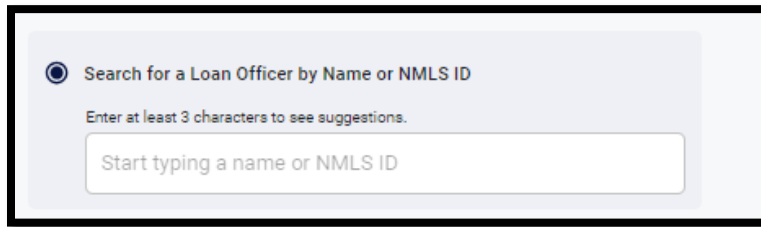


Figure 28 Loan Officer Search Bar

- i. Type the name of the appropriate LO into the Search bar. The Search Options display (Figure 29).

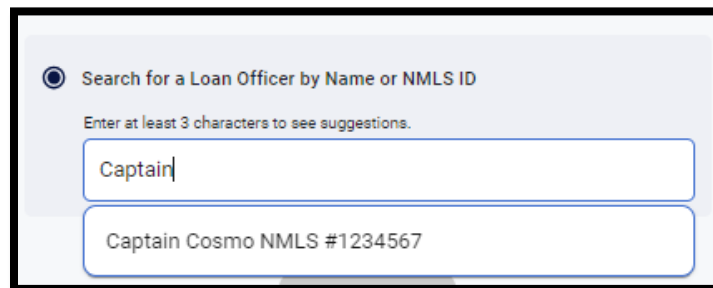


Figure 29 Loan Officer Search Options – Typical

- ii. Select the appropriate LO (Figure 29).
6. Select the **Download** button (Figure 30). A browser pop-up displays with the marketing material PDF (Figure 31).

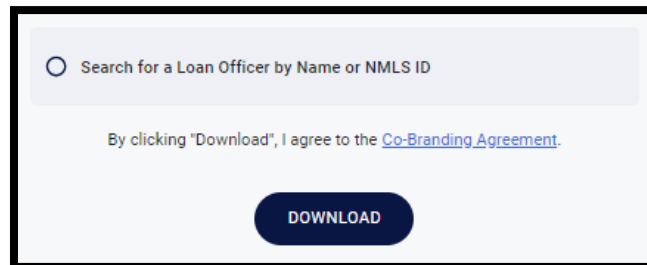


Figure 30 Download Button – Typical

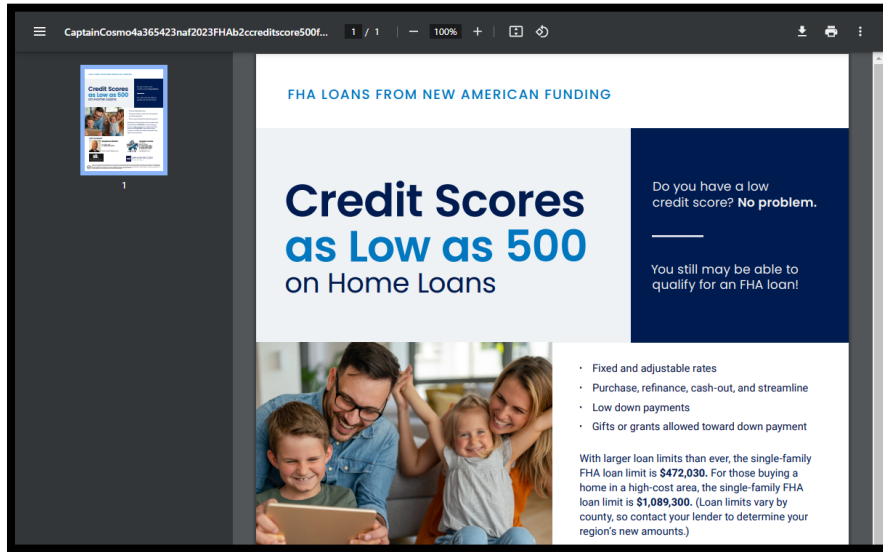


Figure 31 Browser PDF Reader – Typical

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

7. Select the **Download** button (Figure 31).

Resource Center

The **Resource Center** screen (Figure 32) educates users on NAF resources that REAs use to secure borrowers. Hovering over a resource card displays a brief description of the resource (Figure 33). Selecting a card opens the following pages:

- NAF Cash Page
- Co-Branding Page
- NAF Pathway Page
- NAF Concierge Page
- NAF Insurance Page
- UQUAL Page

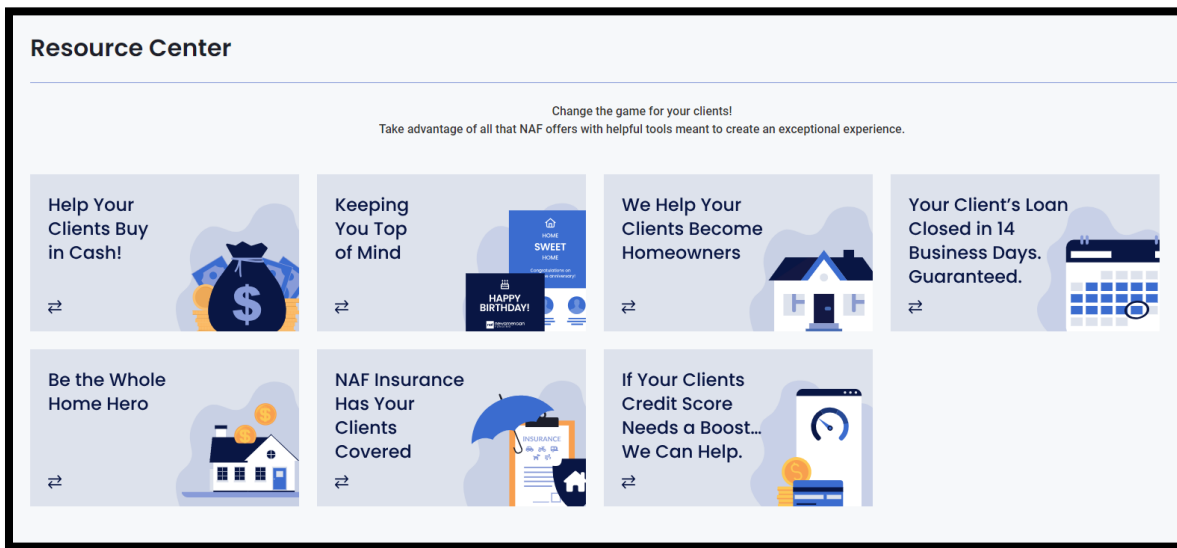


Figure 32 Resource Center

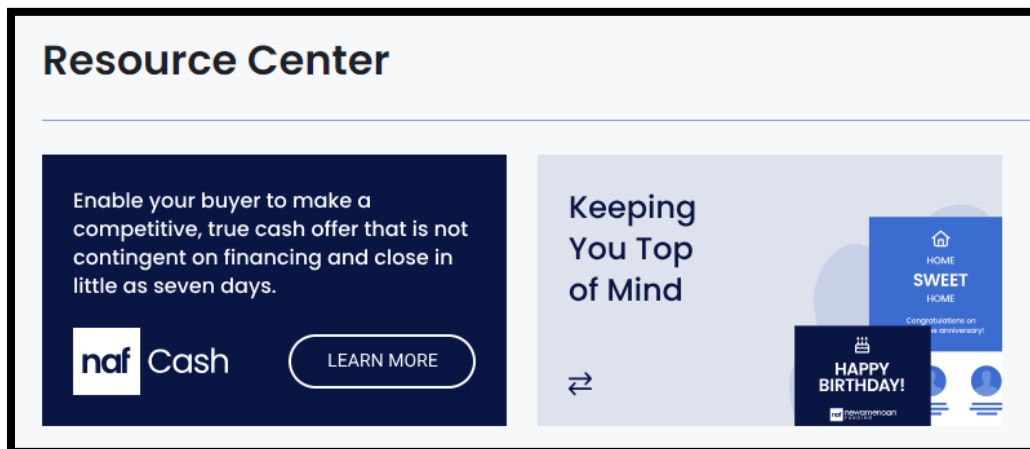


Figure 33 Resource Center Hover Cards – Typical

NAF Cash Page

The NAF Cash page (Figure 34) 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 34) opens the [NAF Cash training Calendly site](#).

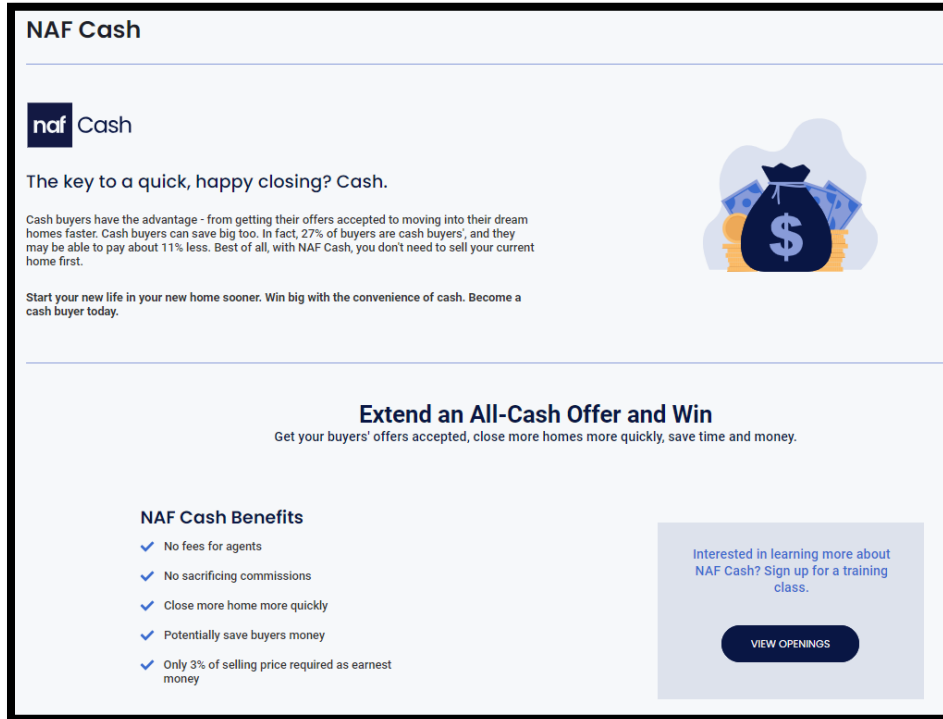


Figure 34 NAF Cash Page

Co-Branding Page

The Co-Branding page (Figure 35) displays a description of NAF co-branding options for REAs.

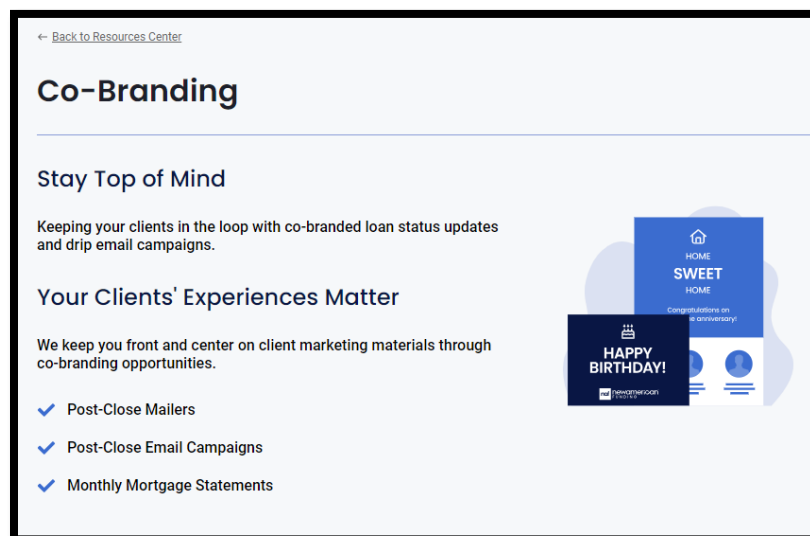


Figure 35 Co-Branding Page

NAF Pathway Page

The NAF Pathway page (Figure 36) displays a description of the NAF Pathway program and the contact information of preferred loan officers to request more information.

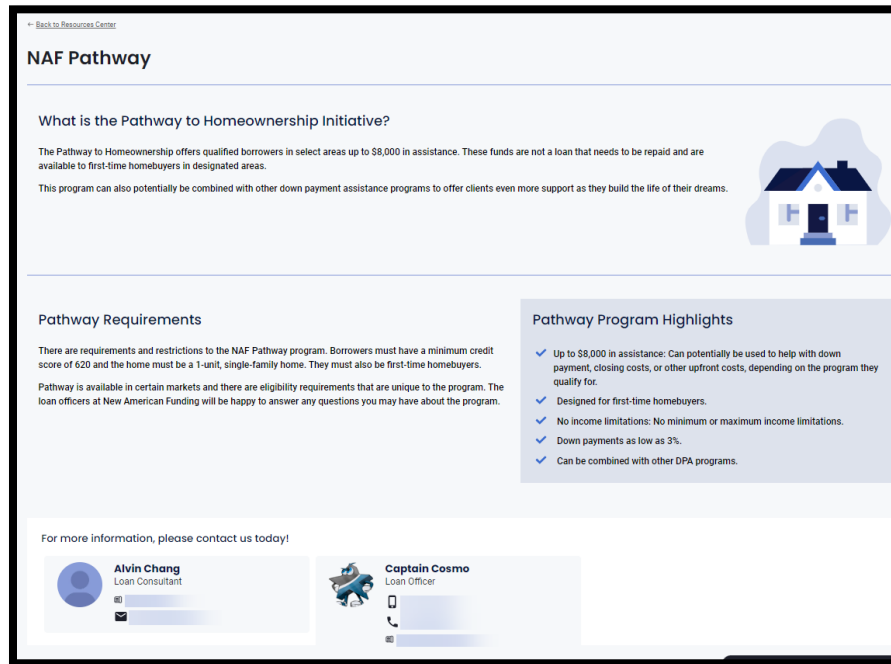


Figure 36 NAF Pathway Page

14-Day Close Guarantee Page

The 14-Day Close Guarantee page (Figure 37) displays a description and benefits of the guarantee that NAF delivers borrower loans within 14 business days.

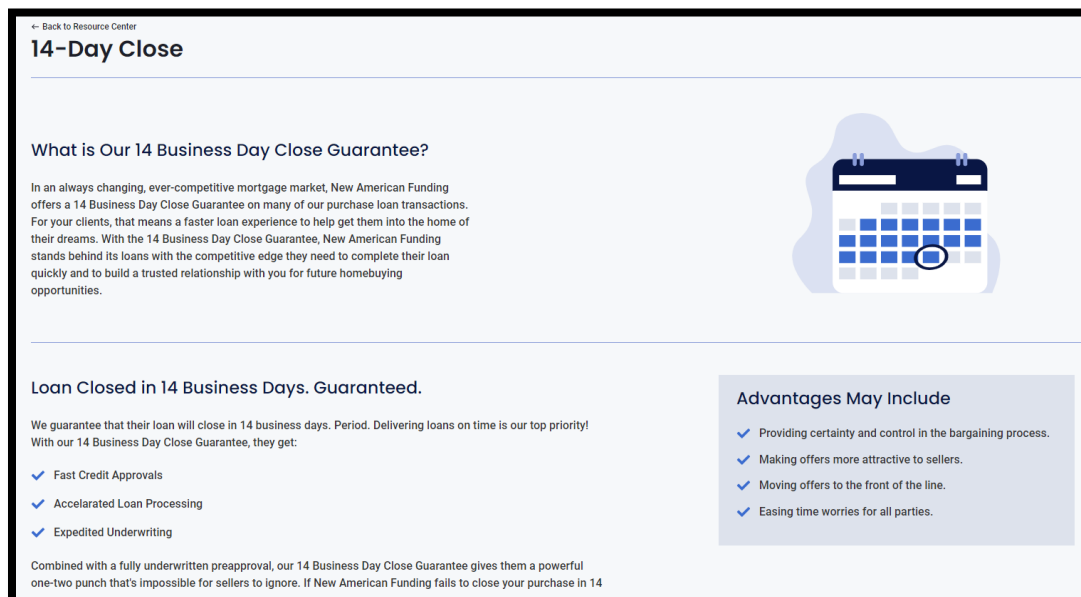


Figure 37 NAF 14-Day Close Guarantee Page

NAF Concierge Page

The NAF Concierge page (Figure 38) displays a description of the moving program NAF Concierge and the contact information of preferred loan officers to request more information.

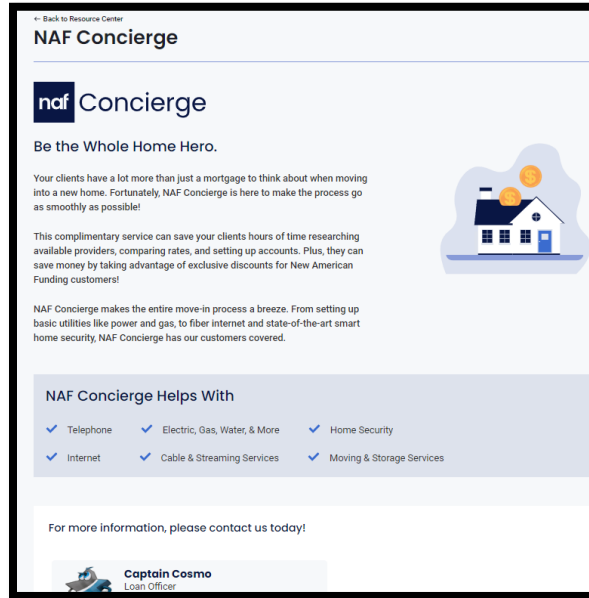


Figure 38 NAF Concierge Resource Page

NAF Insurance Page

The NAF Insurance page (Figure 39) displays a description of the NAF Insurance program and the contact information of preferred loan officers to request more information.

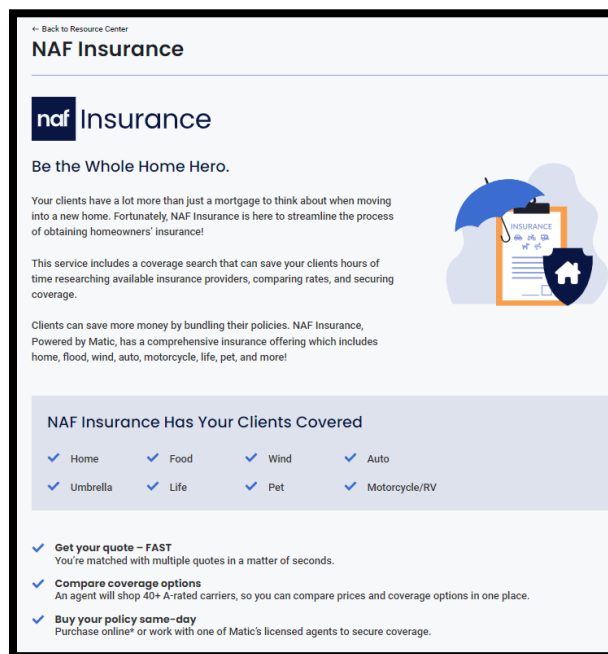


Figure 39 NAF Insurance Resource Page

UQUAL Page

The UQUAL page (Figure 40) displays a description of the UQUAL program and the contact information of preferred loan officers to request more information.

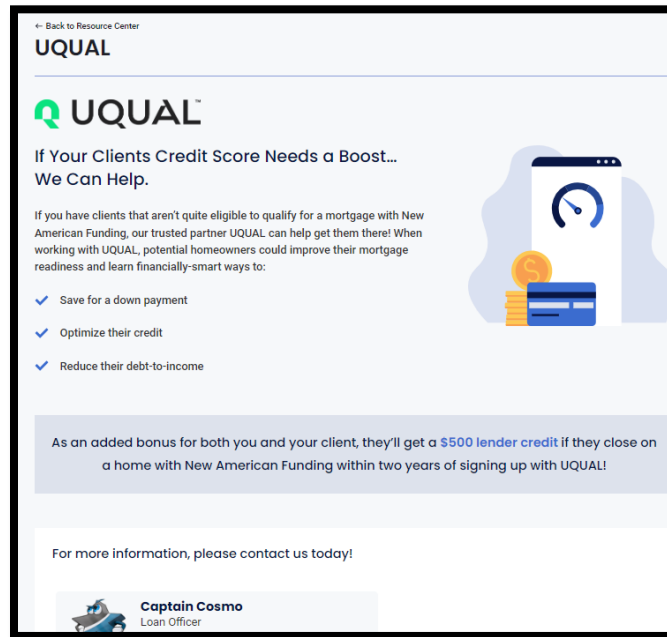


Figure 40 UQUAL Resource Page

Settings

The NAF Connect Settings menu (Figure 11) allows the user to customize following features:

- Profile Settings
- Loan Officer Settings
- Communications Settings

Profile Settings

 **Note: Any changes performed in the NAFConnect Profile Settings will sync with other NAF products.**

The **Profile** button in the Navigation Menu (Figure 11) opens the Profile Settings (Figure 72). The Profile Settings (Figure 41) allows the user to change the following information:

- Profile Picture
- Personal Information
- Real Estate License No.
- Company Logo
- Mailing Address
- Company Information
- Password

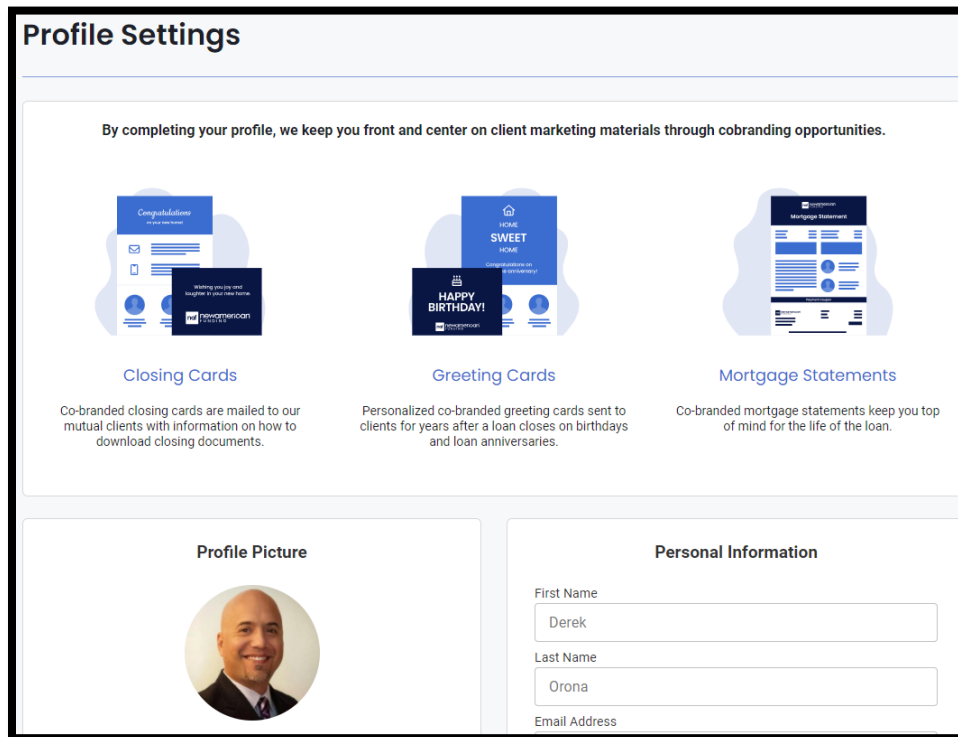


Figure 41 Profile Settings – Finished Profile – Typical

The Profile Settings screen displays the **Incomplete Profile Warning** to remind users with incomplete profiles to complete the profile information fields (Figure 42). The

Incomplete Profile Warning displays what information is missing from the user profile and updates when the user adds information to the profile (Figure 43).

Profile Settings

The following information is missing from your profile:

- Real Estate License
- Mailing Address (Mailing Address, City, Zipcode)
- Company Information (Company Name, Company Address, City, Zipcode)

Profile Picture

Personal Information

First Name
Derek

Last Name
Orona

Email Address

Figure 42 Profile Settings – Incomplete Profile Warning

Profile Settings

The following information is missing from your profile:

- Mailing Address (Mailing Address, City, State, Zipcode)
- Company Information (Company Name, Company Address, City, Zipcode)

Figure 43 Incomplete Profile Warning – Typical

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

Selecting the **Save Changes** or **Update** buttons (Figure 44) saves any changes.

Personal Information

First Name
James

Last Name
Realtor

Email Address

Phone Number

SAVE CHANGES

Figure 44 Profile Settings – Save Changes Button

The following procedures can be performed in Profile Settings:

- Navigate to Profile Settings
- Update Profile Picture
- Update Company Logo
- Update Company Information
- Update Personal Information
- Update Real Estate License
- Update Mailing Address
- Change Password

Loan Officer Settings

The **Loan Officer Settings** page (Figure 45) allows users to search and add preferred loan officers. Putting loan officers as preferred will set that officer 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

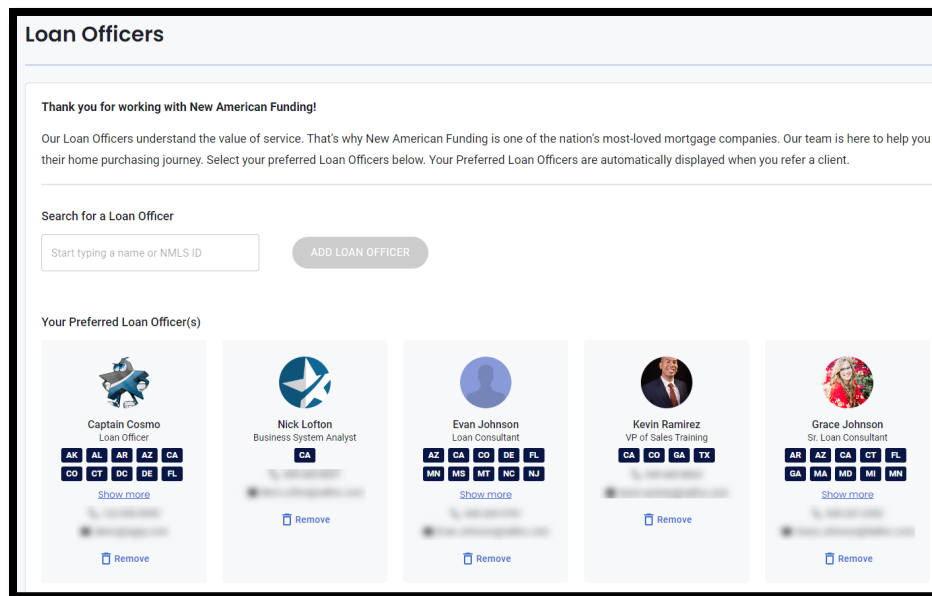


Figure 45 Loan Officer Settings

The following procedures can be performed in the Loan Officer Settings:

- Navigate to the Loan Officers Settings
- Add a Preferred Loan Officer
- Remove a Preferred Loan Officer

Communications Settings

The **Communications Settings** page (Figure 46) allows users to view email notifications from NAF Connect and opt-out of product and marketing emails. Unselecting the checkbox in **Email Subscription Preferences** will prevent NAF Connect from sending announcements, updates, and recommendations from NAF Connect (see Update Email Subscription Preferences).

Notification	Text/SMS	Email
Referral Submitted	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Loan Officer Assigned		<input checked="" type="checkbox"/>
Pre-Qualified		<input checked="" type="checkbox"/>
Pre-Approved		<input checked="" type="checkbox"/>
Weekly Client Updates		<input checked="" type="checkbox"/>

Email Subscription Preferences

Product and Marketing Emails

Receive announcements, updates, and recommendations from the NAF Connect team.

SAVE CHANGES

Figure 46 Communications Settings

The following procedures can be performed in the Communications Settings page:

- Navigate to the Communications Settings
- Update Email Subscription Preferences

Navigate to Profile Settings

Perform the following tasks to navigate to Profile Settings:

1. Navigate to the **Navigation Menu** (Figure 11).
2. Select the **Settings** button (Figure 11) in the Navigation Menu. The **Settings** drop-down menu displays (Figure 18).
3. Select the **Profile** button (Figure 18). The **Profile Settings** displays (Figure 41).

Update Profile Picture

Perform the following tasks to update a profile picture:

1. Navigate to the **Profile Settings** screen (see Navigate to Profile Settings).
2. Select the **Update** button under the profile picture (Figure 47). The **Drop file here** area displays (Figure 48).

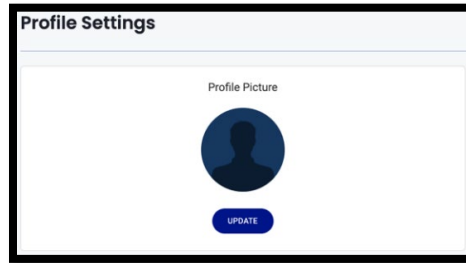


Figure 47 Profile Picture Section – Update Button

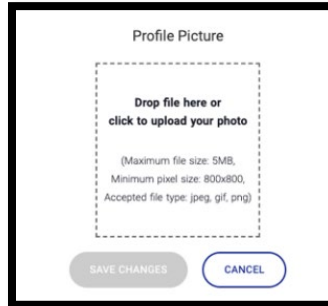


Figure 48 Profile Picture Section – Drop File Here Area

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

3. Select the **Drop file here** area to upload the appropriate profile photo (Figure 48). The system file explorer displays (Figure 49 and Figure 50).

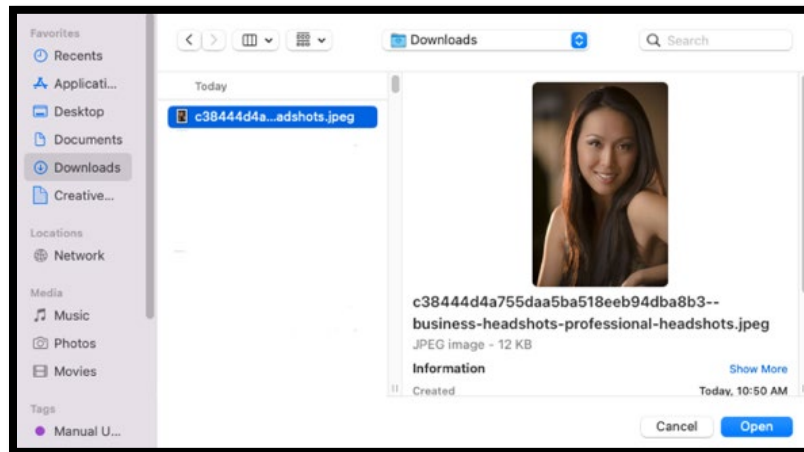


Figure 49 File Explorer – Mac

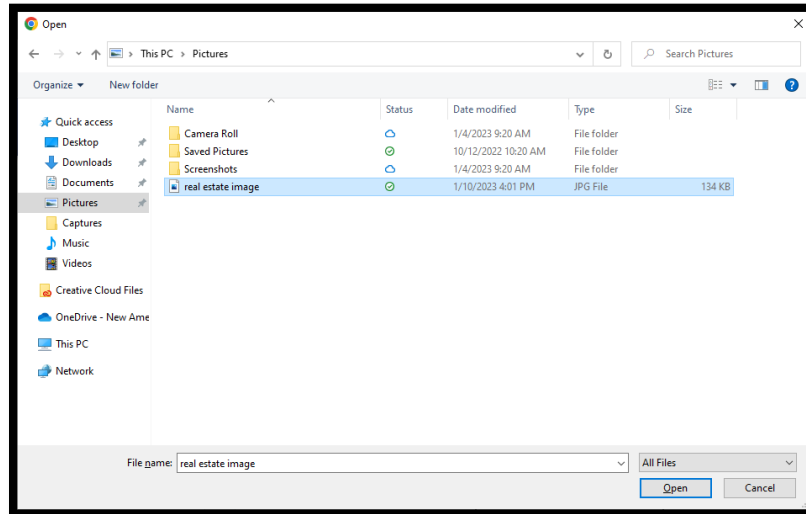



Figure 50 File Explorer – Windows

 **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.

4. Select the appropriate file for the profile picture (Figure 49 and Figure 50).
5. Select the **Open** button (Figure 49). The **Profile Picture** screen displays (Figure 51).

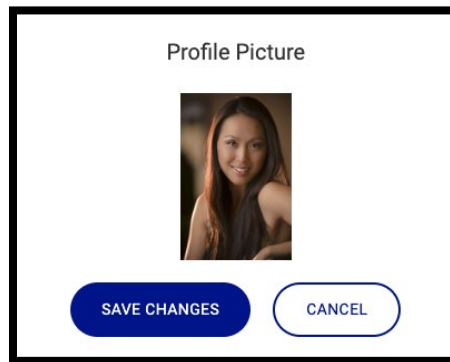


Figure 51 Profile Picture Section – Save Changes Button

6. Select the **Save Changes** button (Figure 51).

Update Company Logo

Perform the following tasks to update a company logo image:

1. Navigate to the **Profile Settings** screen (see Navigate to Profile Settings).
2. Select the **Update** button under the company logo (Figure 52). The **Drop file here** area displays (Figure 53).

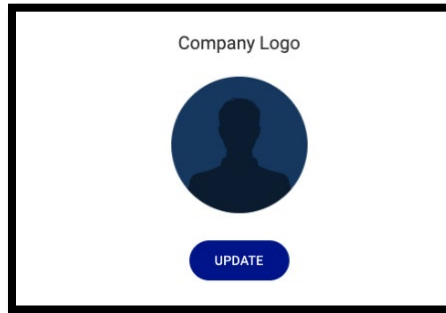


Figure 52 Company Logo Section – Update Button

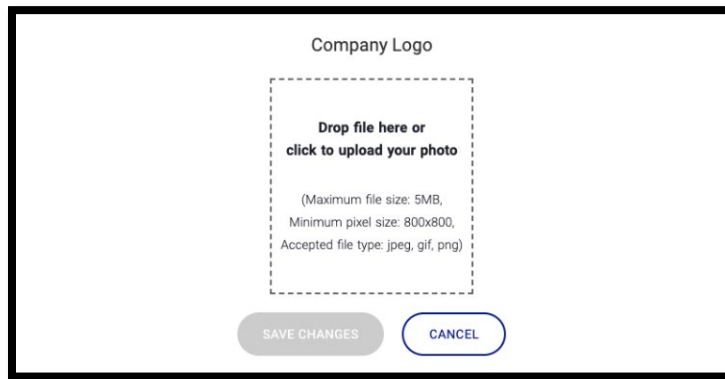


Figure 53 Company Logo Section – Drop File Here Area

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

3. Select the **Drop file here** section to upload the appropriate logo (Figure 53). The system file explorer displays (Figure 54 and Figure 55).

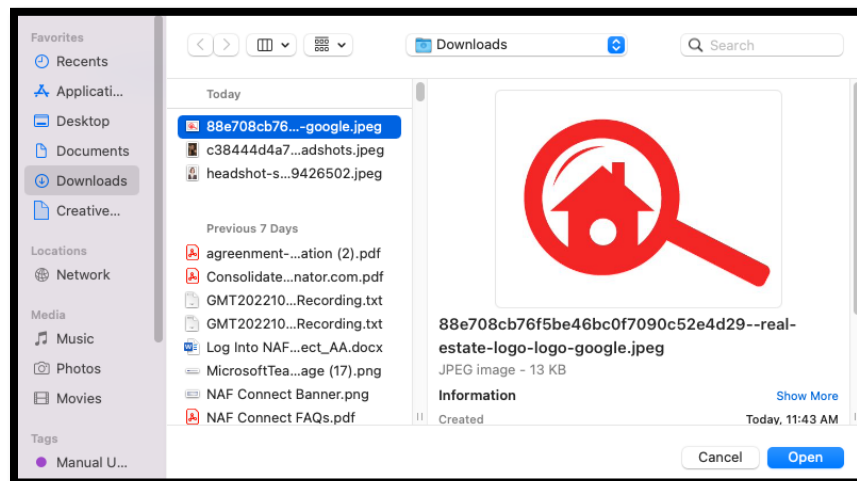


Figure 54 File Finder – Company Logo Image

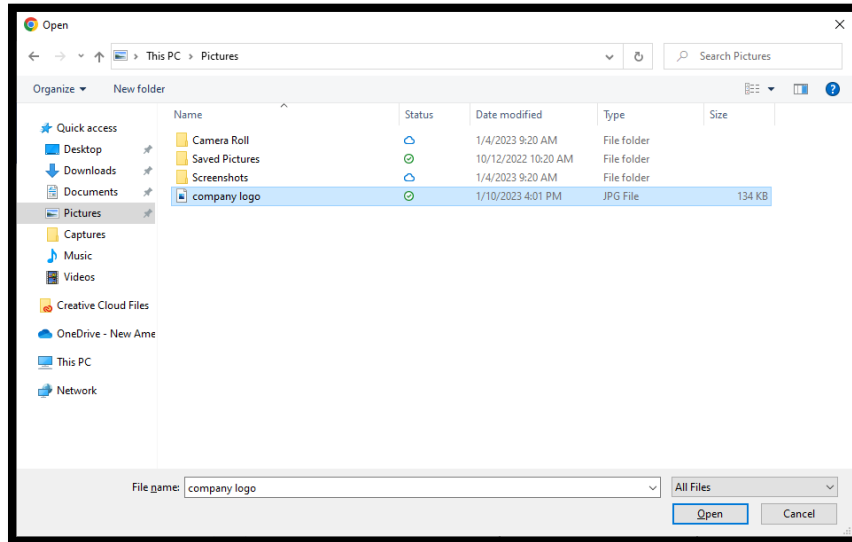


Figure 55 File Finder – Windows

 **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.

4. Select the appropriate file (Figure 54 and Figure 55).
5. Select the **Open** button (Figure 54). The **Company Logo** screen displays (Figure 56).

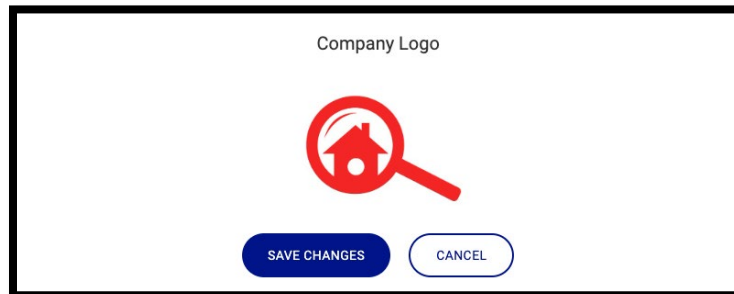


Figure 56 Company Logo Section – Save Changes Button

6. Select the **Save Changes** button (Figure 56).

Update Company Information

Perform the following tasks to update company information:

1. Navigate to the **Profile Settings** screen (see Navigate to Profile Settings).
2. Verify or update the information in the **Company Information** section (Figure 57):
 - a. Company Name
 - b. Company Address
 - c. City
 - d. State
 - e. Zipcode

The screenshot shows a form titled "Company Information". It contains the following fields:

- Company Name *: Awesome Realty
- Company Address *: 123 Lemon Grove
- City *: Lake Forest
- State *: CA
- Zipcode *: 92630

 At the bottom center, there is a grey button labeled "SAVE CHANGES".

Figure 57 Company Information Section

 **Note:** The Save Changes button changes colors a field contains new information (Figure 58).

3. Select the **Save Changes** button (Figure 58).

This screenshot is identical to Figure 57, but the "SAVE CHANGES" button is now blue. Additionally, the input fields for "Company Address" (25471 Arctic Ocean Drive), "City" (Lake Forest), and "State" (CA) are highlighted with a light blue background, indicating they have been updated.

Figure 58 Company Information Section – Save Changes Button Active

Update Personal Information

Perform the following tasks to update personal information:

1. Navigate to the **Profile Settings** screen (see Navigate to Profile Settings).
2. Verify or update the following required information into the **Personal Information** section (Figure 59):
 - a. First Name
 - b. Last Name
 - c. Email Address
 - d. Phone Number

Personal Information

First Name
James

Last Name
Realtor

Email Address

Phone Number

SAVE CHANGES

Figure 59 Personal Information Section – Typical

 **Note:** The **Save Changes** button changes colors when an information field contains new information (Figure 60).

3. Select the **Save Changes** button (Figure 60).

Personal Information

First Name
Jeff

Last Name
Kvalevog

Email Address
wow@nafinc.com

Phone Number
555-111-1111

SAVE CHANGES

Figure 60 Personal Information Section – Save Changes Button Active

Update Real Estate License

Perform the following tasks to update the real estate license:

1. Navigate to the **Profile Settings** screen (Figure 41).
2. Scroll to the bottom of the web page. The **Real Estate License** section displays (Figure 61).

Figure 61 Real Estate License Section – Typical

3. Update the following required Real Estate License information (Figure 61):
 - a. Real Estate License Number(s)
 - b. State(s)
4. Select the **Save Changes** button (Figure 61).

Update Mailing Address

Perform the following tasks to update a mailing address:

1. Navigate to the **Profile Settings** screen (Figure 41).
2. Scroll to the middle of the web page. The **Mailing Address** section displays (Figure 62).

Figure 62 Mailing Address Section – Typical

3. Select either the **Same as Company Address** or **Other** radio button (Figure 62).
 - a. If you select the **Other** radio button, perform the following tasks:
 - i. Type the address into the **Mailing Address** field (Figure 62).
 - ii. Type the city into the **City** field (Figure 62).
 - iii. Select the state from the **State** drop-down menu.
 - iv. Type a zipcode into the **Zipcode** field (Figure 62).
4. Select the **Save Changes** button (Figure 62).

Change Password

Perform the following tasks to change a password:

1. Navigate to the **Profile Settings** screen (Figure 41).
2. Type the following required information into the **Password** section (Figure 63):
 - a. Current Password
 - b. New Password
 - c. Confirm New Password

Figure 63 Password Section – Typical

 **Note:** The **Save Changes** button changes colors when an information field contains new information (Figure 64).

3. Select the **Save Changes** button (Figure 64).

Figure 64 Password Section – Save Changes Button Active

Navigate to the Loan Officers Settings

Perform the following tasks to navigate to the Loan Officer Settings:

1. Navigate to the **Navigation Menu** (Figure 11).
2. Select the **Settings** option on the left side of the dashboard (Figure 11). The **Settings** drop-down menu displays (Figure 18).
3. Select the **Loan Officer** option (Figure 18). The **Loan Officers** section displays (Figure 45).

Add a Preferred Loan Officer

Perform the following tasks to add a preferred loan officer:

1. Navigate to the **Loan Officer Settings** (see Navigate to the Loan Officers Settings).
2. Type the name of the appropriate LO or Nationwide Multistate Licensing System (NMLS) ID into the **Search for a Loan Officer** search box (Figure 65). The **Loan Officer** drop-down menu displays (Figure 66).

Figure 65 Loan Officer Search Box

Figure 66 Loan Officer Search Box – Loan Officer Drop-Down



Note: The Add Loan Officer button changes from grey to blue (Figure 67).

3. Select the appropriate LO from the drop-down menu (Figure 66).

Search for a Loan Officer

Kevin Ramirez

ADD LOAN OFFICER

Figure 67 Loan Officer Search Box – Active Add Loan Officer Button

4. Select the **Add Loan Officer** button (Figure 67). The **Your Preferred Loan Officer(s)** page displays (Figure 68).

Thank you for working with New American Funding!

Our Loan Officers understand the value of service. That's why New American Funding is one of the nation's most-loved mortgage companies. Our team is here to help you and your clients throughout their home purchasing journey. Select your preferred Loan Officers below. Your Preferred Loan Officers are automatically displayed when you refer a client.

Search for a Loan Officer

Start typing a name or NMLS ID

ADD LOAN OFFICER

Your Preferred Loan Officer(s)

CC

Captain Cosmo
Loan Officer

AL AK AZ AR CA
CO CT DE DC FL

[Show more](#)

657-600-7000
demo@zigzy.com

Remove

Figure 68 Loan Officer Page – Preferred Loan Officer(s) Displayed

Remove a Preferred Loan Officer

Perform the following tasks to remove a preferred loan officer:

1. Navigate to the **Loan Officer** Settings page (see Navigate to the Loan Officers Settings).
2. Navigate to the appropriate LO.
3. Select the **Remove** button (Figure 69). The **Your Preferred Loan Officer(s)** section displays without the removed LO.



Figure 69 Your Preferred Loan Officer(s) Section

Navigate to the Communications Settings

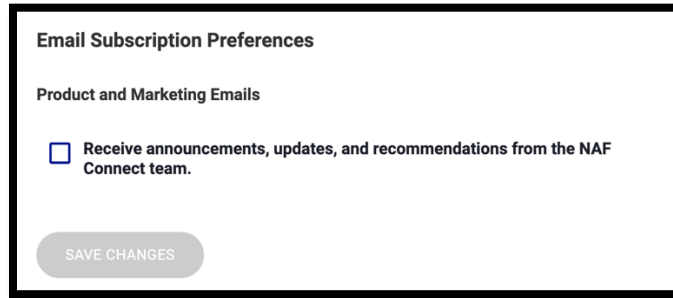
Perform the following tasks to navigate to the Communications Section:

1. Navigate to the **Navigation Menu** (Figure 11).
2. Select the **Settings** option on the left side of the dashboard (Figure 11). The **Settings** drop-down Menu displays (Figure 18).
3. Select the **Communications Option** (Figure 18). The **Communications Settings** page displays (Figure 46).

Update Email Subscription Preferences

Perform the following tasks to update email subscription preferences:

1. Navigate to **Communications Settings** page (see Navigate to the Communications Settings).
2. Select the **Receive announcements, updates, and recommendations from the NAF Connect team** checkbox to receive NAF Connect emails (Figure 70).

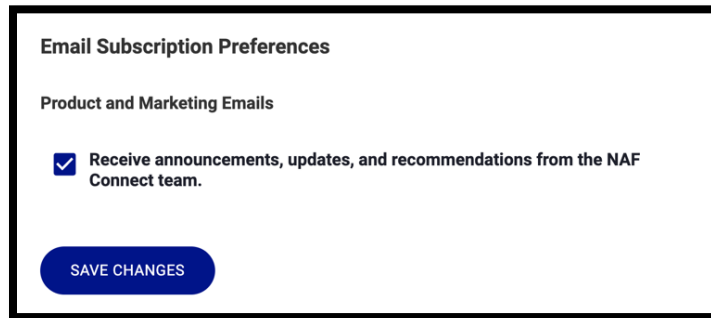


The screenshot shows a form titled "Email Subscription Preferences". Under the heading "Product and Marketing Emails", there is a checkbox that is currently unchecked. The text next to the checkbox reads: "Receive announcements, updates, and recommendations from the NAF Connect team." At the bottom of the form, there is a light gray button labeled "SAVE CHANGES".

Figure 70 Email Subscription Preferences Section

 **Note: The Save Changes button changes colors when an information field contains new information (Figure 60).**

3. Select the **Save Changes** button (Figure 71).



The screenshot shows the same form as Figure 70. In this version, the checkbox is checked. The text next to the checkbox reads: "Receive announcements, updates, and recommendations from the NAF Connect team." At the bottom of the form, the "SAVE CHANGES" button is now a dark blue color, indicating it is active.

Figure 71 Email Subscriptions Preferences Section – Save Changes Button Active

Help Page

The **Help** page (Figure 72) is comprised of contact information for NAF Connect Support, NAF Connect training schedule information, and contact information for preferred loan officers (see Loan Officer Settings).

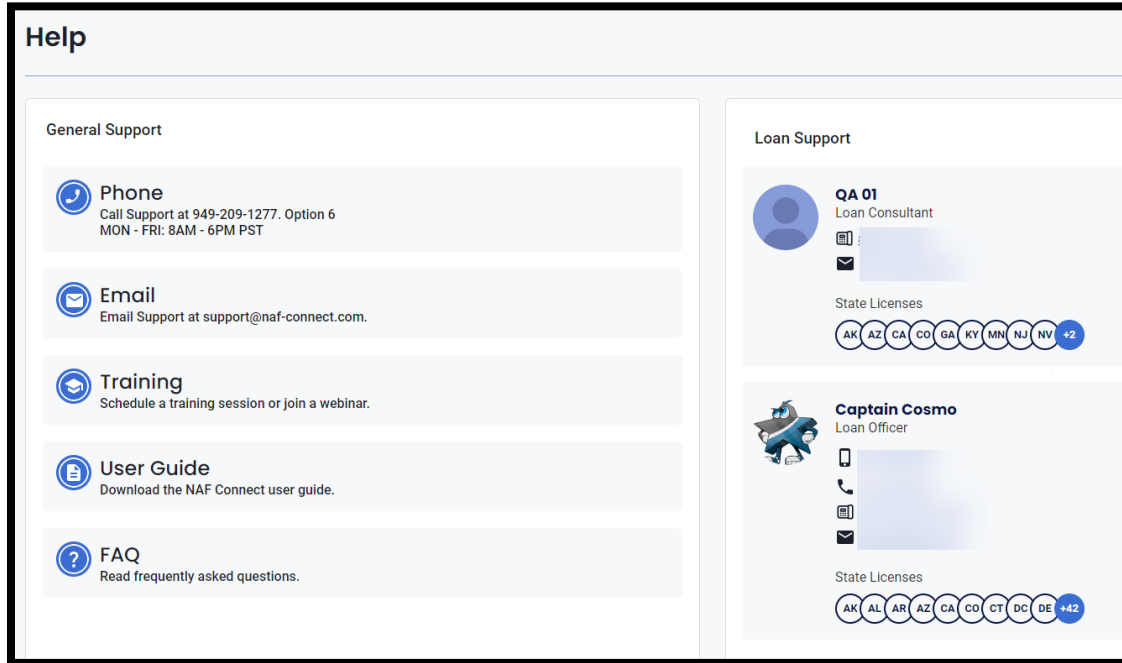


Figure 72 Help Section

Training Button

Selecting the **Training** button (Figure 72) opens the NAF Connect training Calendly page (Figure 73) in the default browser. The **NAF Connect Training** and the **NAF Connect One-on-One Assistance** trainings are available for any users.

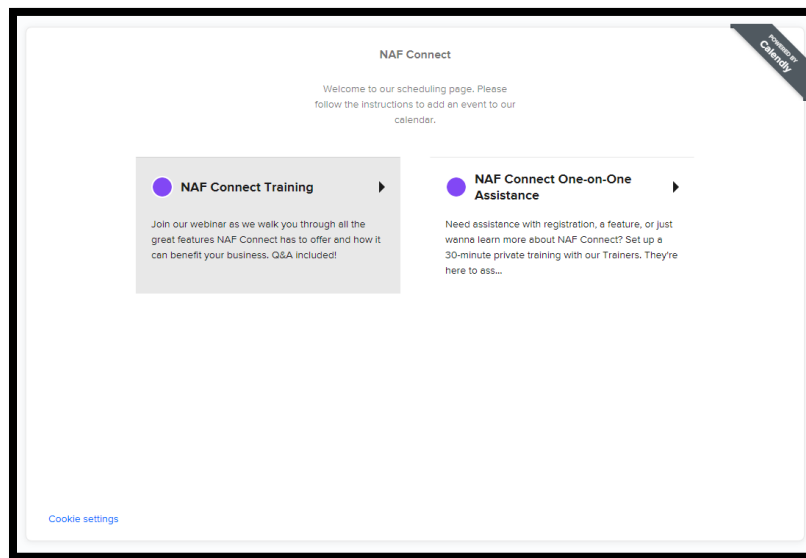


Figure 73 NAF Connect Training Calendly

User Guide Button

Selecting the **User Guide** button (Figure 72) will download and open the NAF Connect User Guide.

FAQ Button

Selecting the **FAQ** button (Figure 72) opens the FAQ page (Figure 74) which lists and answers frequently asked questions from NAF Connect users.

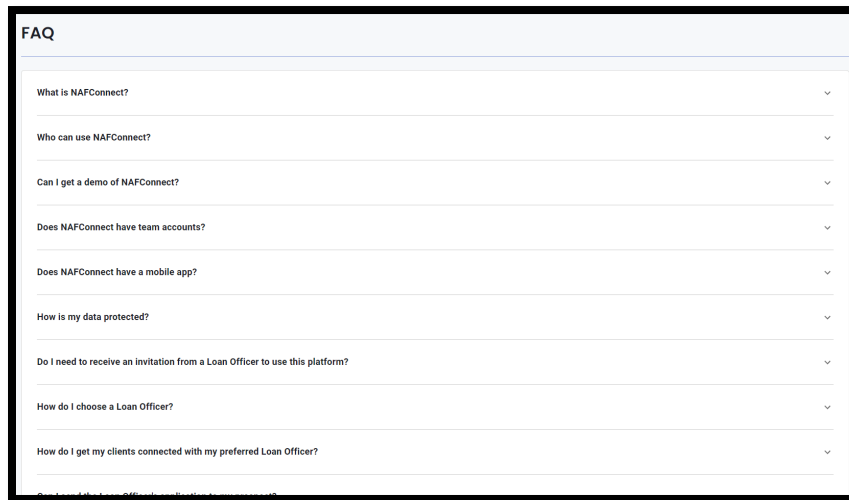


Figure 74 FAQ Page

Sign Out Button

The **Sign Out** button (Figure 11) 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 12 and Figure 16) is located on the right side of most screens and opens the Feedback pop-up. The Feedback pop-up allows users to send feedback to the NAF Connect team to improve the platform.

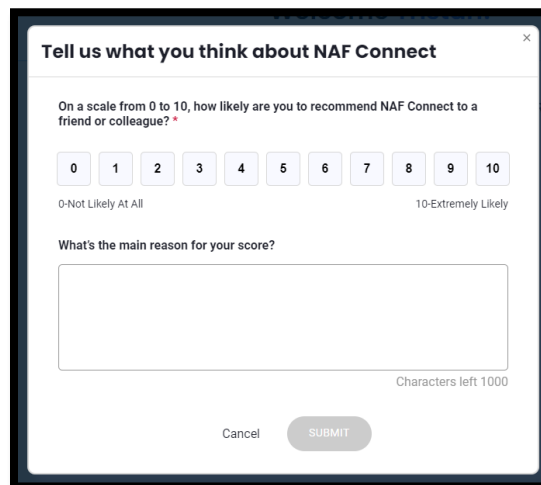


Figure 75 Feedback Pop-up

CHAPTER 2: ENROLLMENT AND LOGIN

Enrollment

Enrollment is a requirement to use the platform (see Enroll for a NAF Connect Account). Once successfully enrolled a NAF Connect account will be created.

Enroll for a NAF Connect Account with Email

Perform the following tasks to enroll:

 **Note: Google Chrome and Safari are the preferred web browsers for NAFConnect.**

1. Navigate to the NAF Connect platform at <https://naf-connect.com/> (Figure 76) in a web browser. The NAF Connect Login Page displays (Figure 1 and Figure 2).

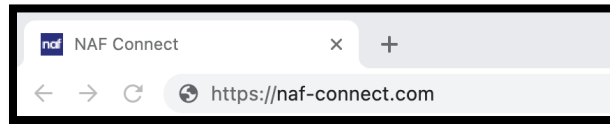


Figure 76 NAF Connect URL

 **Note: The Get Started button on the NAF Connect login page also opens the Create an Account pop-up.**

2. Select the **Sign Up** button in the top corner (Figure 1). The **Create an Account** pop-up displays (Figure 77).

 A screenshot of a mobile device displaying a "Create an Account" pop-up form. The form includes the following fields:

- Sign in with options: Google, LinkedIn, Facebook.
- Text: "By clicking Sign in with Google, LinkedIn or Facebook you agree to New American Funding's [Terms of Use](#) and acknowledge that you have reviewed the [Privacy Policy](#)."
- Separator: "or"
- First Name: Input field with "Ricky" entered.
- Last Name: Input field with "Juarez" entered.
- Email Address: Input field with "ricky.realty@gmail.com" entered.
- Cell Phone Number: Input field with "555-111-1111" entered.
- Real Estate License No.: Input field with "123456789" entered.
- State: Dropdown menu with "CA" selected.
- Password: Input field with masked characters "*****".
- Confirm Password: Input field with masked characters "*****".
- Text: "We need to verify your account with a code sent to your cell phone number. Message and data rates may apply."
- Button: "SEND CODE & CONTINUE" with a right arrow.

Figure 77 Create an Account for NAF Connect – Step 1

3. Type the following required information into the textboxes (Figure 77):
 - 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
4. Select the **Send Code And Continue** button (Figure 77). The **Verification** screen displays (Figure 78).

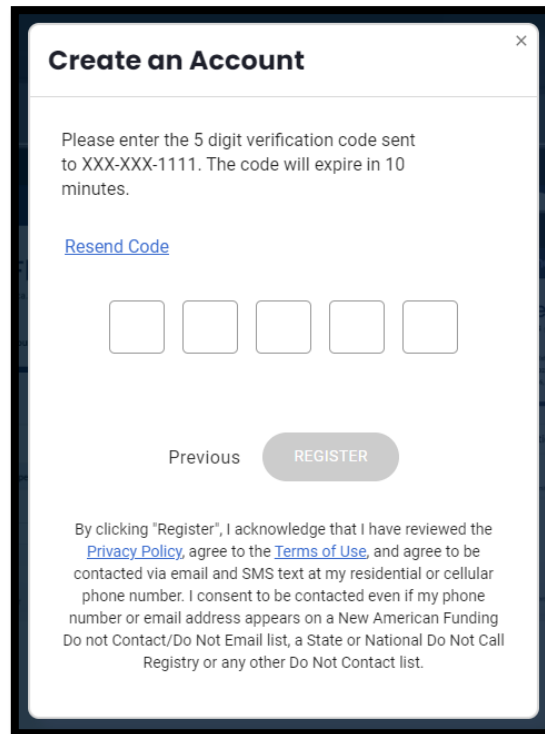



Figure 78 Verification Screen – Typical

5. Enter the code texted to the user phone number (Figure 78).

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

6. Select the **Register** button (Figure 78).

Enroll for a NAF Connect 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 NAFConnect.**

1. Navigate to the NAF Connect platform at <https://naf-connect.com/> (Figure 76) in a web browser. The NAF Connect Login Page displays (Figure 1 and Figure 2).

2. Select the **Sign Up** button in the top corner (Figure 1). The **Create an Account** pop-up displays (Figure 77).
3. Select a **Social Sign In** button (Figure 77). The 3rd party pop-up displays (Figure 79).

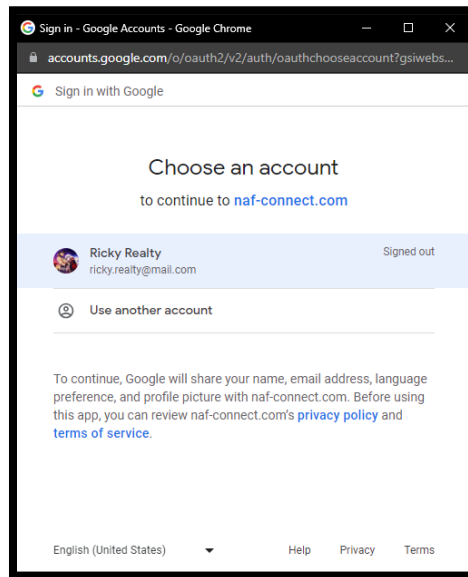


Figure 79 3rd Party Social Sign In – Typical

4. Select the desired account or **Use another account** button (Figure 79). The 3rd Party Sign In page displays (Figure 80).

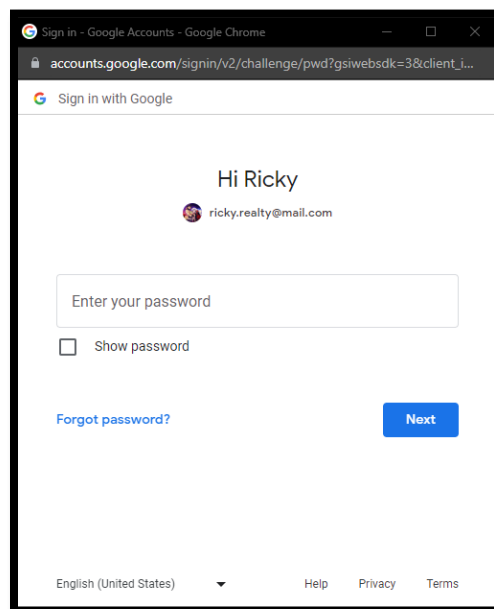


Figure 80 3rd Party Sign In Page – Typical

5. Type the password into the **Password** field (Figure 80).
6. Select the **Next** button (Figure 80). The Dashboard displays (see Dashboard).

Login

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

The login pop-up displays once a user has enrolled in NAF Connect (see Enrollment) or selects the Log In Button on the NAF Connect Main Page. Logging into NAF Connect opens the Client List with the Real-time Alerts pop-up unless the user enables real time mobile notifications.

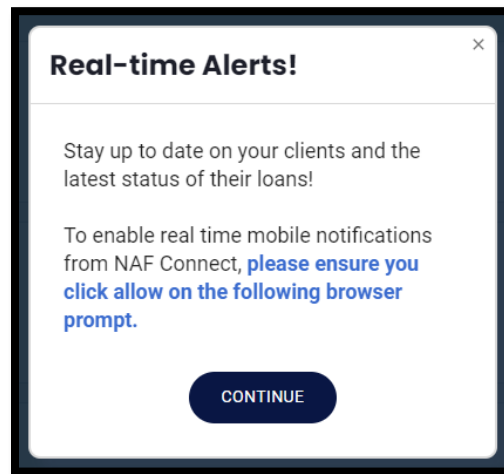


Figure 81 Real-time Alerts Pop-up

Log into NAF Connect with Email

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

Perform the following tasks to log into NAF Connect:

1. Navigate to the NAF Connect platform at <https://naf-connect.com/> (Figure 76) in a web browser. The NAF Connect Login Page displays (Figure 1 and Figure 2).
2. Select the **Log In** button at the top of the page (Figure 1). The **Log In** pop-up displays (Figure 82).

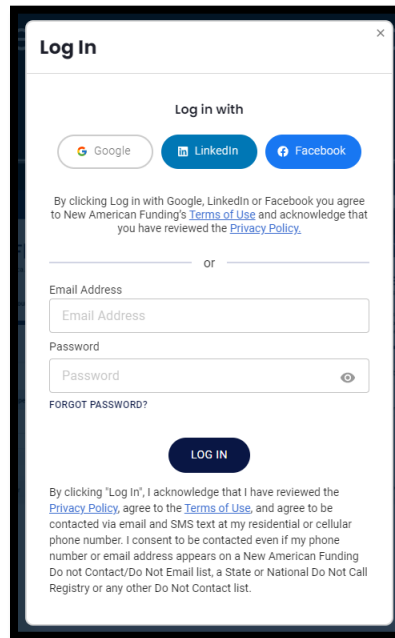


Figure 82 NAF Connect Log In Screen

3. Type the email address and password credentials into the required textboxes (Figure 82).
4. Select the **Log In** button (Figure 82). The Dashboard displays (see Dashboard).

Log 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 76) in a web browser. The NAF Connect Login Page displays (Figure 1 and Figure 2).
2. Select the **Log In** button at the top of the page (Figure 1). The **Log In** pop-up displays (Figure 82).
3. Select a **Social Sign In** button (Figure 82). The 3rd party pop-up displays (Figure 79).
4. Select the desired account (Figure 79). The 3rd Party Sign In page displays (Figure 80).
5. Type the password into the **Password** field (Figure 80).



Note: Accounts that have not shared all appropriate information to NAF Connect displays the Additional Permissions pop-up (Figure 83) 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 80). The Dashboard displays (see Dashboard).

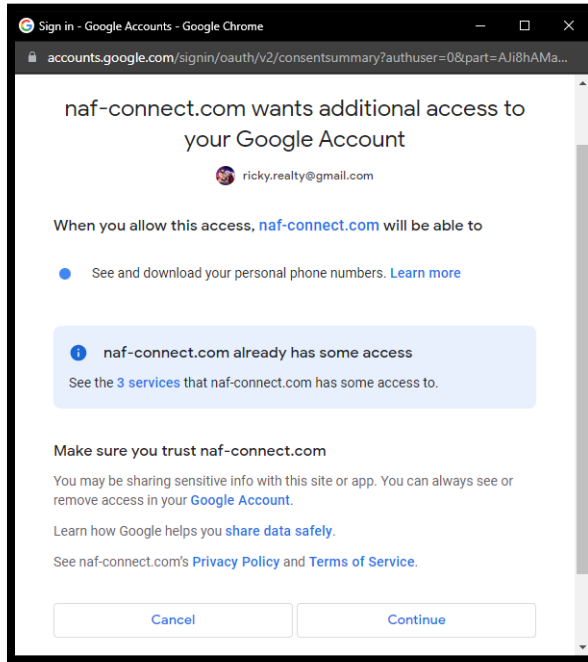


Figure 83 Additional Permissions Pop-up – Typical

CHAPTER 3: FEATURES

Clients

NAF Connect displays the **Client List** on the Dashboard (see Dashboard). The **Clients** button (Figure 11) returns the user to the Client List. Selecting the **Refer a Client** button begins the referral process (see Refer a Client).

Client Profile

A client profile can be viewed in the NAF Connect platform. Selecting the name of a client from the Client List opens an existing Client Profile. The **Client Profile** displays relevant loan information and the status of the loan application. The following procedures can be performed from the Client Profile:

- Call a Client
- Email a Client
- Edit a Pre-Approval Letter

← Back to Clients

Grant Hardaway

Date Referred: Aug 16, 2023 Loan Closing Date: Sep 30, 2023

Loan Type: Purchase Subject Property: [Redacted]

Progress: Referral Submitted → Pre-Approved → Submitted to Underwriting → Conditionally Approved → **Final Review** → Cleared to Close → Funded

Submitted for Final Review.
We are actively reviewing the file and may need additional information.

Income	Property	Assets	Credit	Other
Outstanding	Submitted	Cleared		

Notes [Add New Note](#)

[View All Notes](#)

Sep 01, 2023

Me
We love New American Funding!!
11:33 AM · Shared with Kevin

Aug 18, 2023

Me
All loan conditions are met
10:46 AM · Shared with Kevin

Figure 84 Client Profile

Loan Milestones

Loan Milestones can be viewed from the **Client Profile** using the Loan Milestone Tracker (Figure 85). Once a milestone is complete the Loan Milestones Tracker updates. The loan process includes the following milestones:

- Referral Submitted
- Pre-Approved
- Submitted to Underwriting
- Conditionally Approved Milestone
- Final Review Milestone
- Cleared to Close
- Funded
- Loan Canceled

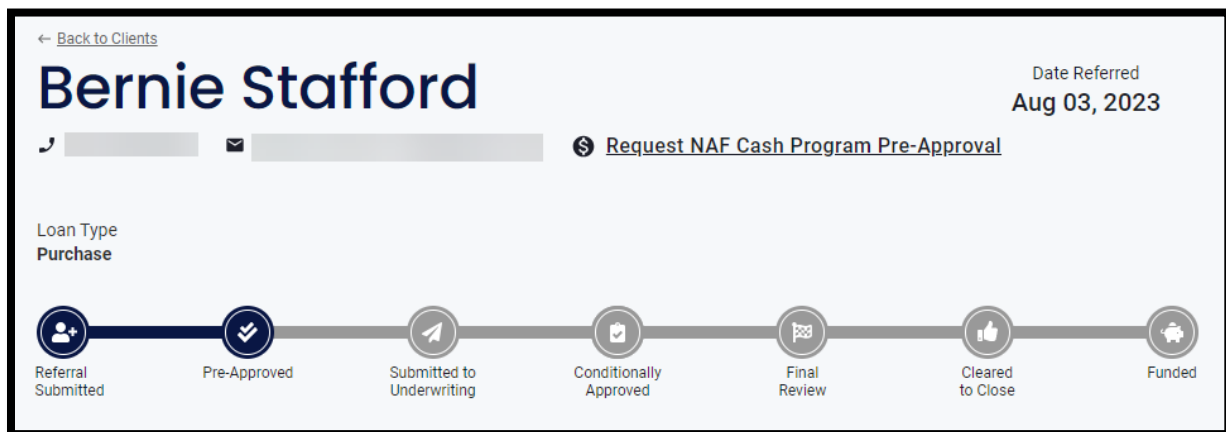


Figure 85 Client Profile – Loan Milestone Tracker

Referral Submitted Milestone

The **Referral Submitted** milestone (Figure 86) displays when a referral is sent to a client. Clients at Referral Submitted milestone have received an email to join NAF Connect but have not started their application.

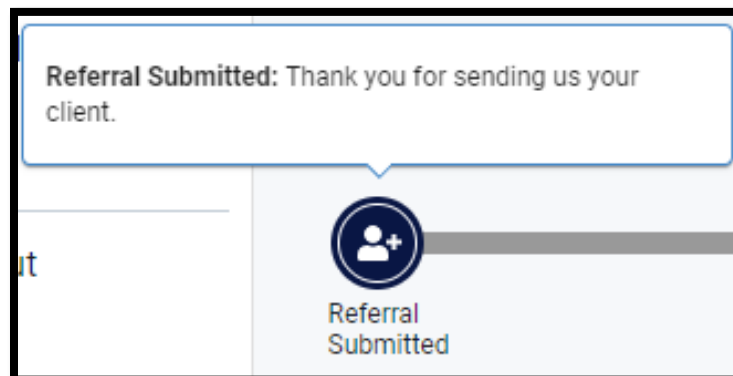


Figure 86 Loan Milestone – Referral Submitted Explanation

Pre-Approved Milestone

The **Pre-Approved** milestone (Figure 87) displays when the applicant submits the required loan application information. Clients at Pre-Approved milestone meet the preliminary requirements for a loan but must submit additional information for underwriter review.

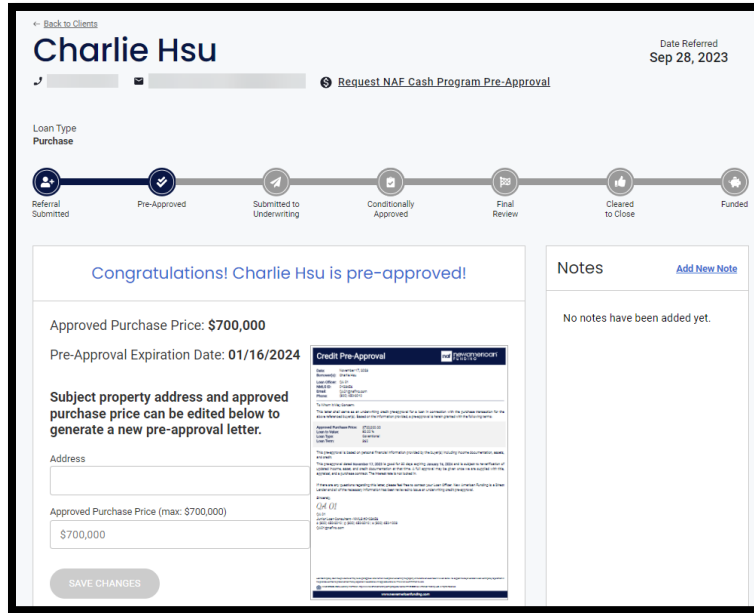


Figure 87 Loan Milestone – Pre-Approved

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 88) 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 88) requests a new Pre-Approval Letter from the client’s Loan Officer.

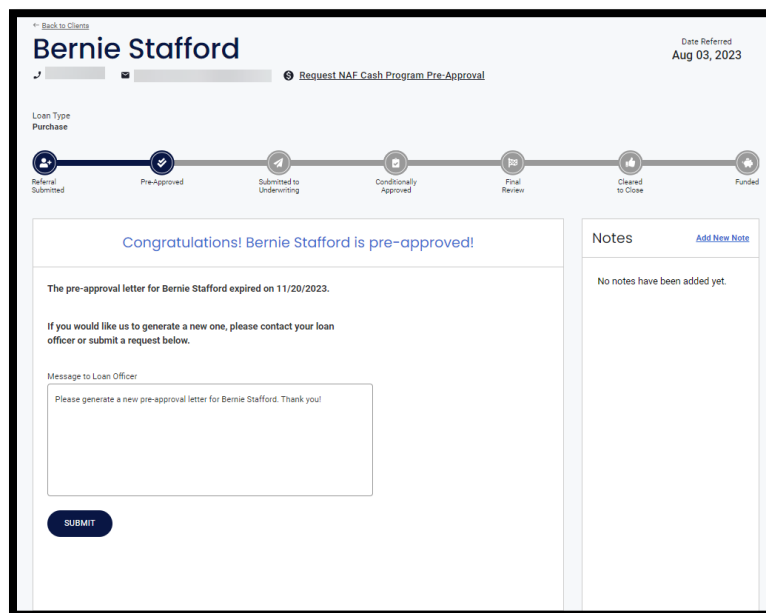


Figure 88 Expired Pre-Approval Letter – Typical

The following procedures can be performed at the Pre-Approved milestone:

- Edit a Pre-Approval Letter
- Print a Pre-Approval Letter
- Print a Pre-Approval Letter
- Download a Pre-Approval Letter

Edit 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 tasks to edit a pre-approval letter:

1. Select the **Clients** button (Figure 11) from the Navigation Menu.
2. Navigate to the appropriate **Client Profile**. The **Pre-Approved** section displays (Figure 89) under the Loan Milestone Tracker.



Figure 89 Pre-Approved Section

3. Enter the address of the subject property (Figure 89).



Note: The adjusted amount must be equal to or lower than the approved amount (Figure 90).

4. Enter the appropriate amount into the **Approved Purchase Price** field (Figure 90).

Address
222 Birch Way

Approved Purchase Price (max: \$700,000)
\$650,000

SAVE CHANGES

Figure 90 Pre-Approval Section – Edit the Pre-Approval Amount Field

5. Select the **Save Changes** button (Figure 90).

View a Pre-Approval Letter

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

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

1. Select the **Clients** button (Figure 11) from the Navigation Menu.
2. Navigate to the appropriate **Client Profile**. The **Pre-Approved** section displays (Figure 89) under the Loan Milestone Tracker.
3. Select the **View** button (Figure 89). The **Pre-Approval Letter** preview displays (Figure 91).

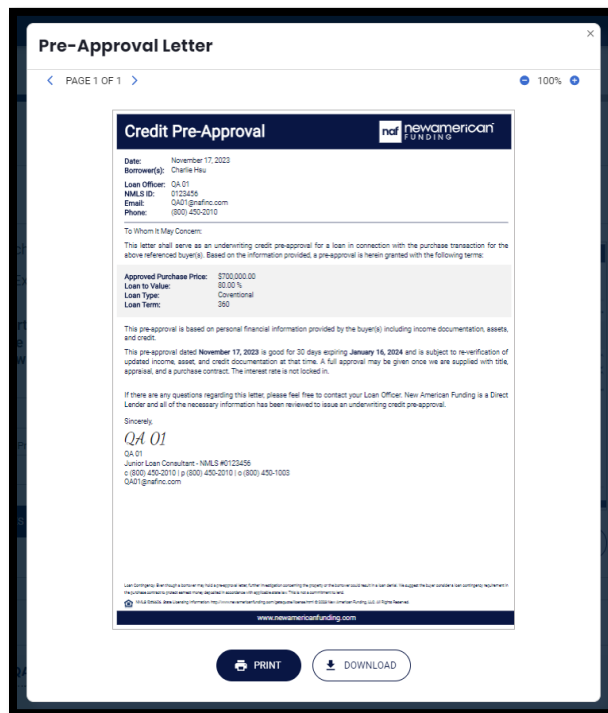


Figure 91 Pre-Approval Letter – Preview

Print a Pre-Approval Letter

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

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

1. Select the **Clients** button (Figure 11) from the Navigation Menu.
2. Navigate to the appropriate **Client Profile**. The **Pre-Approved** section displays (Figure 89) under the Loan Milestone Tracker.
3. Select the **View** button (Figure 89). The **Pre-Approval Letter** preview displays (Figure 91)
4. Select the **Print** button (Figure 91). The system print options display.
5. Select the **Print** button.

Download 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 11) from the Navigation Menu.
2. Navigate to the appropriate **Client Profile** (see Client Profile). The **Pre-Approved** section displays (Figure 89).
3. Select the **Download** button (Figure 90). The pre-approval letter saves to the system default location (Figure 92).

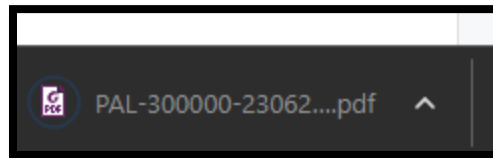


Figure 92 Pre-Approval Section – Downloaded Pre-Approval Letter

Submitted to Underwriting Milestone

The **Submitted to Underwriting** milestone (Figure 93) 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. Requests for consent can be made by following the steps in the **Requesting Client Consent** procedure.

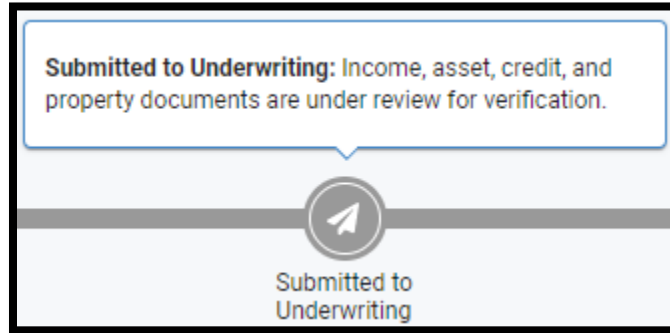


Figure 93 Loan Milestone – Submitted to Underwriting Explanation

Loan Conditions

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

The underwriter of the loan can assign conditions to fund a loan. The **Loan Conditions** section (Figure 94) displays a **Request Consent** button if the user does not have client consent to view loan conditions.

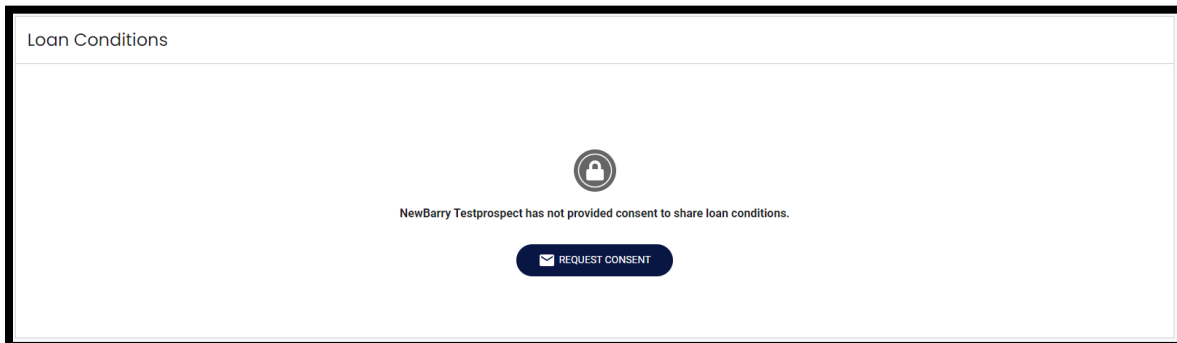


Figure 94 Loan Conditions Section – Request Consent

The Loan Conditions screen (Figure 95) displays if a client has previously granted consent to the user. Loan conditions can be categorized using the following classification:

- Income Conditions
- Property
- Asset
- Credit
- Other

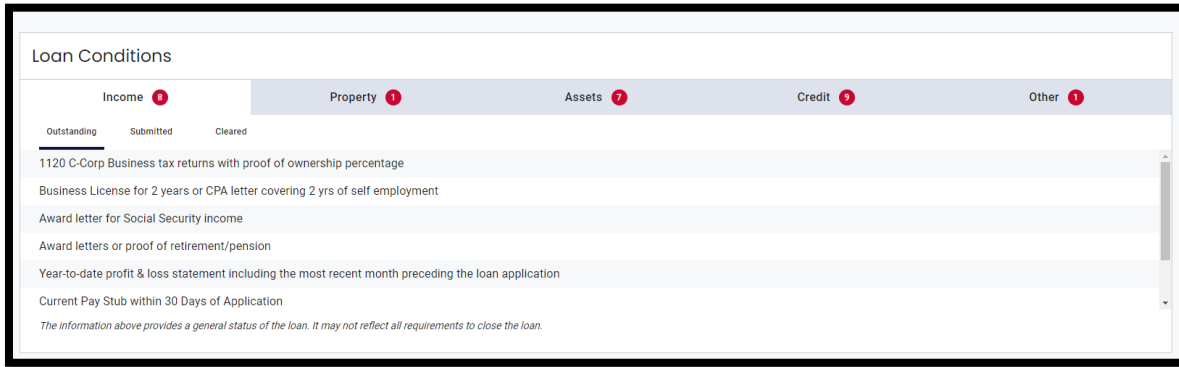


Figure 95 Loan Conditions – Income Conditions

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 95) by default.

Property Conditions

Selecting the **Property** conditions button (Figure 96) displays loan conditions associated with the property (e.g., Roof Renovations).

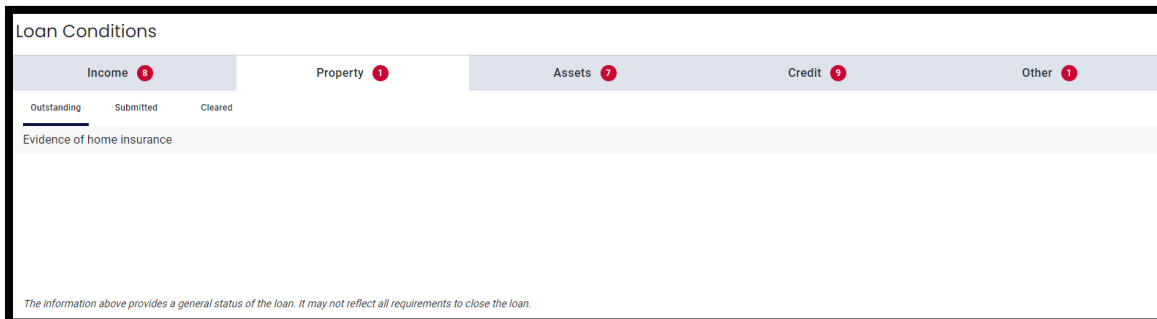


Figure 96 Loan Conditions – Property Conditions

Asset Conditions

Selecting the **Asset** conditions button (Figure 97) displays loan conditions associated with the client assets (e.g., uploading bank statements).

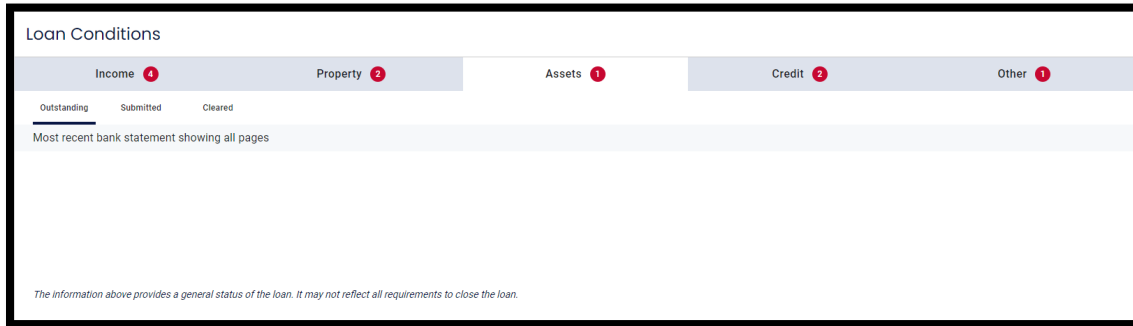


Figure 97 Loan Conditions – Asset Conditions

Credit Conditions

Selecting the **Credit** conditions button (Figure 98) displays loan conditions associated with the client credit (e.g., paying off student loans).



Figure 98 Loan Conditions – Credit Conditions

Other Conditions

Selecting the **Other** conditions button (Figure 98) displays loan conditions that do not fit into other categories (e.g., uploading a copy of Trust Certification).

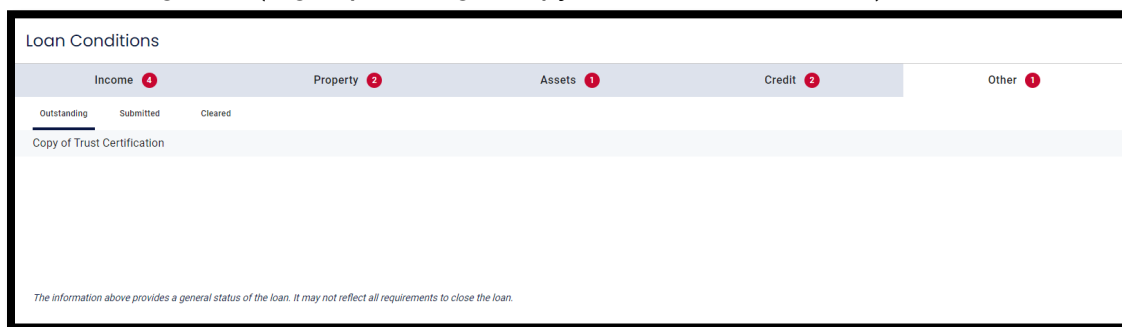



Figure 99 Loan Conditions – Other Conditions

Requesting Client Consent to View Loan Conditions

 **Note:** Requesting Client Consent is only possible during the Submitted to Underwriting milestone.

Perform the following tasks to request client consent to view loan conditions:

1. Select the Clients button from the **Navigation Menu** (Figure 11).
2. Navigate to the appropriate **Client Profile** (see Client Profile). The **Loan Conditions** screen displays (Figure 94).
3. Select the **Request Consent** button (Figure 94). The **Client Consent** pop-up displays (Figure 100).

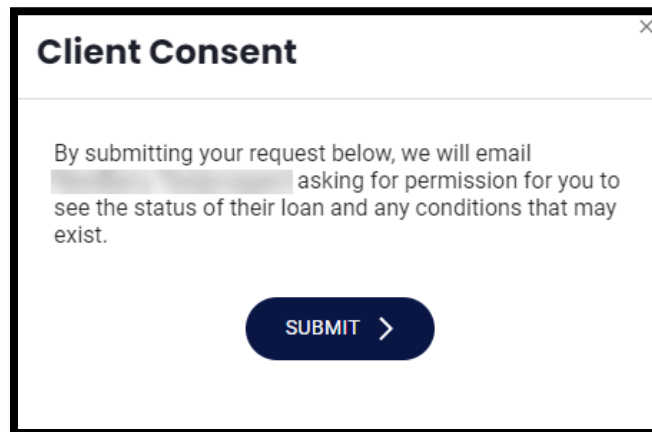


Figure 100 Client Consent Pop-Up

4. Select the **Submit** button (Figure 100). A **Success** notification displays (Figure 101).

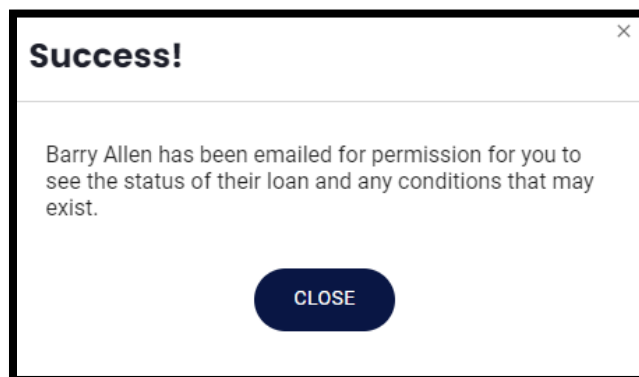


Figure 101 Success Notification - Request Consent

The client will receive an email requesting permission for the NAF Connect to view the loan conditions (Figure 102).

 **Note:** If the client consents, the request consent button (Figure 94) will be replaced with the Loan Conditions screen (Figure 102).

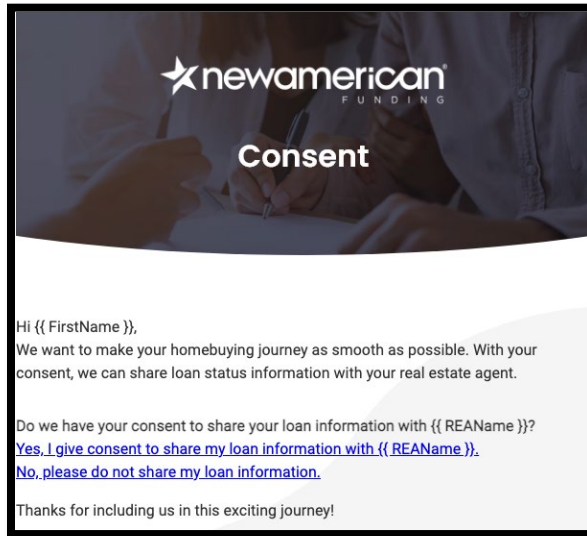


Figure 102 Borrower Notification Email – Loan Conditions Consent

Conditionally Approved Milestone

The **Conditionally Approved** milestone (Figure 103) displays on the Loan Milestones Tracker when the underwriter conditionally approves a loan. Clients at the Conditionally Approved milestone may receive loan conditions that need to be completed prior to loan funding.

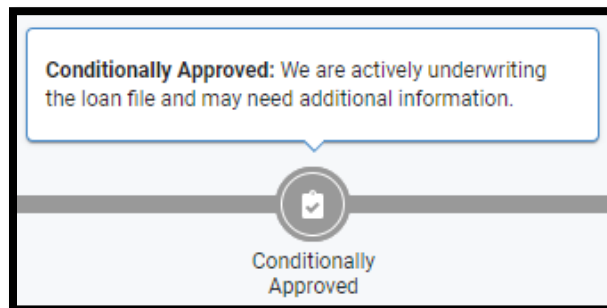


Figure 103 Loan Milestone – Conditionally Approved Explanation

Final Review Milestone

The **Final Review** milestone (Figure 104) 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.

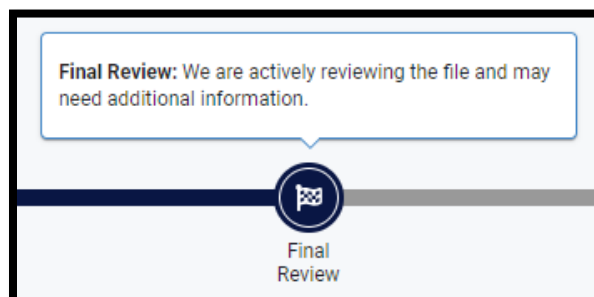


Figure 104 Loan Milestone – Final Review Explanation

Cleared to Close Milestone

The **Cleared to Close** milestone (Figure 105) 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 106) before the loan funds (e.g., the closing location and the settlement services contact).

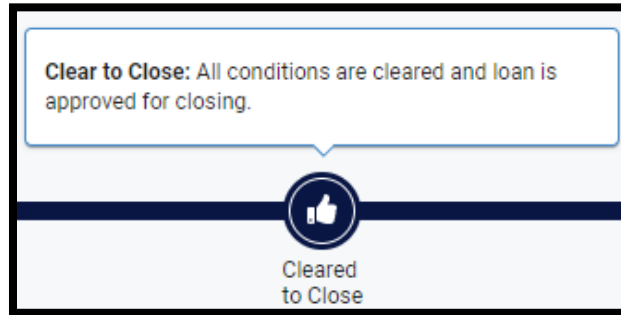


Figure 105 Loan Milestone – Cleared to Close Explanation

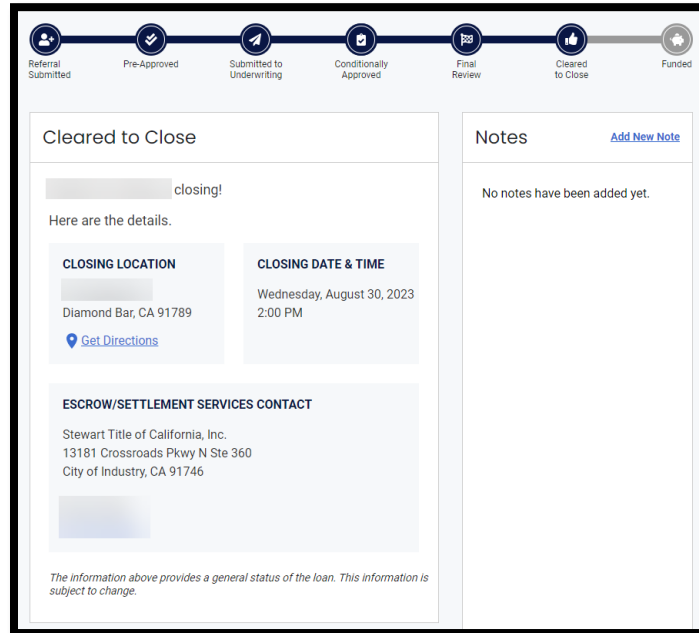


Figure 106 Cleared To Close – Typical

Funded Milestone

The **Funded** milestone (Figure 107) displays on the Loan Milestones Tracker when the client loan application is funded and closed.

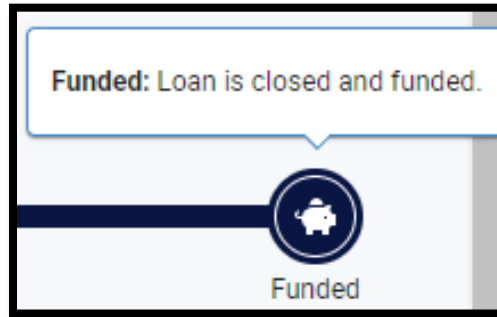


Figure 107 Loan Milestone – Funded Explanation

Loan Canceled Milestone

The **Loan Canceled** milestone (Figure 108) 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.

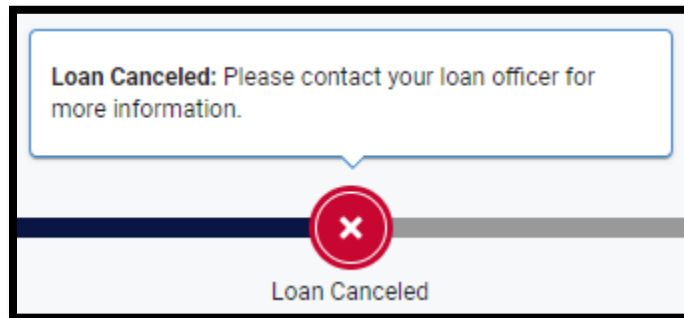


Figure 108 Loan Milestone – Loan Canceled Explanation

Client Notes

The Client **Notes** section (Figure 109) located on the right side of the Client Profile and displays all notes the user or the loan officer have associated with the client. Notes can be shared with the loan officer associated with the client.

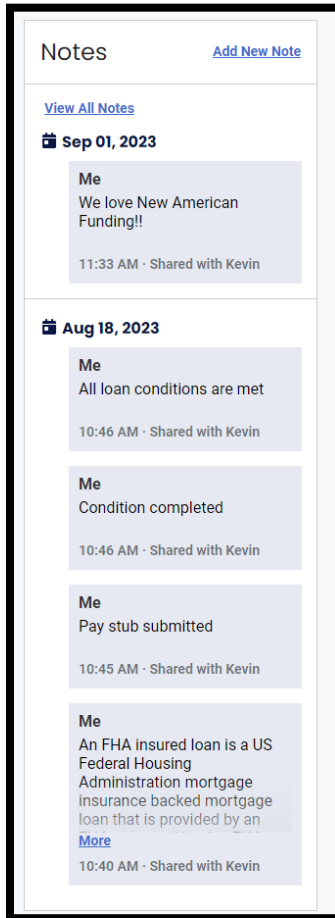


Figure 109 Client Notes Section – Typical

The **Add Note** button (Figure 109) located at the top of the Client Notes section opens the Add a New Note pop-up (Figure 110). The Add Note button allows users to create new notes (see Add a Note).

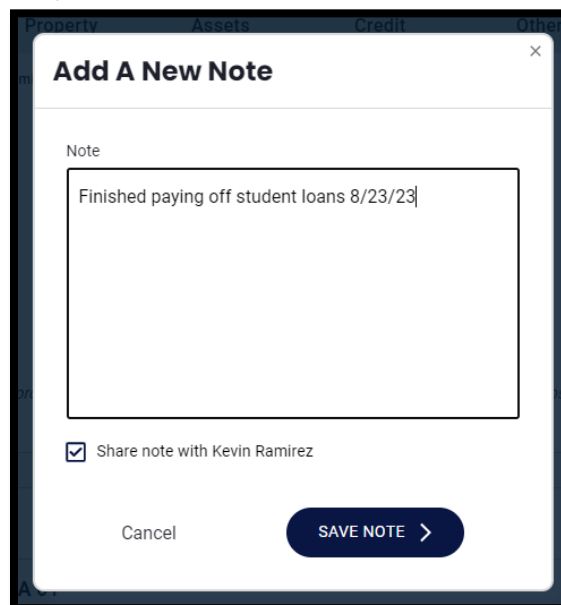


Figure 110 Add A New Note Pop-up – Typical

The **View All Notes** button (Figure 109) opens the Notes pop-up (Figure 111). The Notes pop-up displays all notes associated with the client that the user or the loan officer have created.

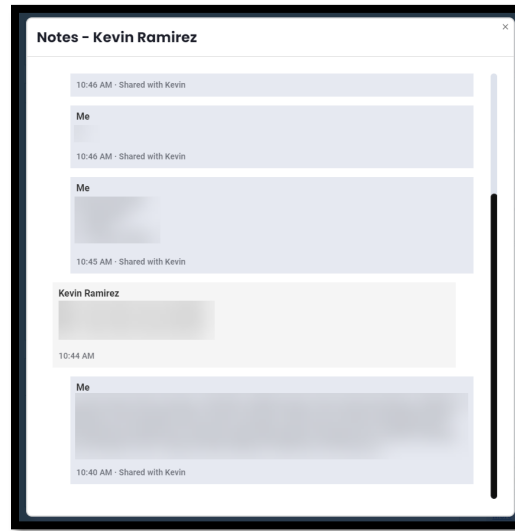


Figure 111 Notes Pop-up – Typical

Add a Note

Perform the following tasks to add a note to a client profile:

1. Navigate to the client profile (see Client Profile).
2. Select the **Add New Note** button (Figure 109). The Add New Note Pop-up displays (Figure 110).
3. Type the desired note into the **Note** field (Figure 110).
4. Select the **Share note** checkbox if appropriate.
5. Select the **Save Note** button (Figure 110). The note displays in the Client Notes section (Figure 109).

Refer a Client

Perform the following tasks to refer a client:

1. Select the **Refer A Client** button on the top right side of the Dashboard (Figure 10). The **Refer a Client** page displays (Figure 112).

The screenshot shows a web form titled "Refer a Client". It is divided into two main sections. The first section, "1 Enter Client Information", contains the following fields: a dropdown menu for "State of Transaction" with "MI" selected; two text input boxes for "First Name" and "Last Name"; a text input box for "Email Address"; and a text input box for "Cell Phone". Below these is a question: "Would you like your client to be considered for our cash buyer program called [NAF Cash?](#)" with "Yes" selected. The second section, "2 Select A Loan Officer", is partially visible at the bottom.

Figure 112 Refer A Client Page

2. Type or select the required information into the following textboxes (Figure 112):
 - a. State of Transaction
 - b. First Name
 - c. Last Name
 - d. Email Address
 - e. Cell Phone
 - f. NAF Cash Program
 - i. If the user selects the **Yes** radio 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 contact the client to begin the NAF Cash process.

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

3. Select a Loan Officer by using one of the following options (Figure 113):

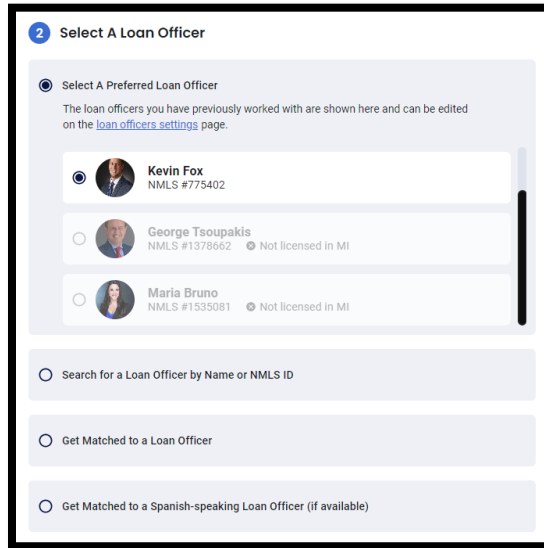


Figure 113 Select A Loan Officer – Refer A Client Page – Typical

- a. Select the **Preferred Loan Officer** radio button (Figure 113).
 - i. Select the radio button next to the desired preferred Loan Officer (see Add a Preferred Loan Officer).
- b. Select the **Search for a Loan Officer** radio button (Figure 113).
 - i. Type the name or NMLS ID of the desired Loan Officer into the search bar (Figure 114).

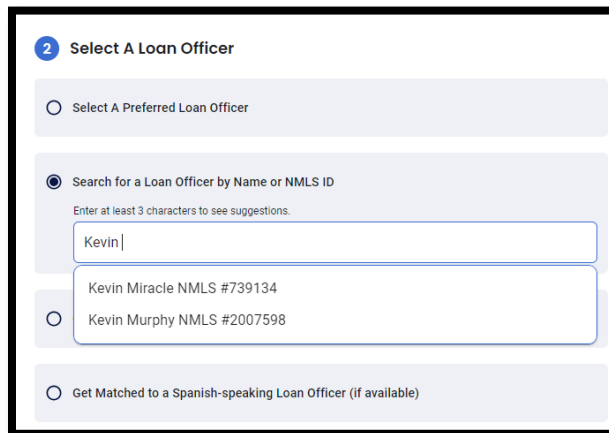


Figure 114 Search for a Loan Officer – Typical

- ii. Select the desired Loan Officer (Figure 114).
- c. Select the **Get Matched to a Loan Officer** radio button (Figure 115).

Figure 115 Get Matched to a Loan Officer Radio Button

- d. Select the **Get Matched to a Spanish-speaking Loan Officer (if available)** button (Figure 116).

Figure 116 Get Matched to a Spanish-speaking Loan Officer Radio Button

4. Select an answer for the **Are you working with a NAF Agent Relationship Manager?** field (Figure 117).

Figure 117 Enter Additional Information Field

5. Enter a note into the **Additional Notes** field if appropriate (Figure 117).
6. Select the **Submit Referral** button (Figure 117). The **Successfully Referred** toast message (Figure 118) displays after the platform successfully sends all emails.



Figure 118 Successfully Referred Toast Message – Typical

When the Success notification displays (Figure 118), the following emails are sent:

- An email to the user confirming the referral submission (Figure 119)
- An email to the referred LO confirming the new client (Figure 120)
- An email to the referral to begin the application:
 - With a known LO (Figure 121)
 - With a compatible LO (Figure 122)

If the user referred the client to NAF Cash, the user will receive the NAF Cash confirmation email (Figure 123).

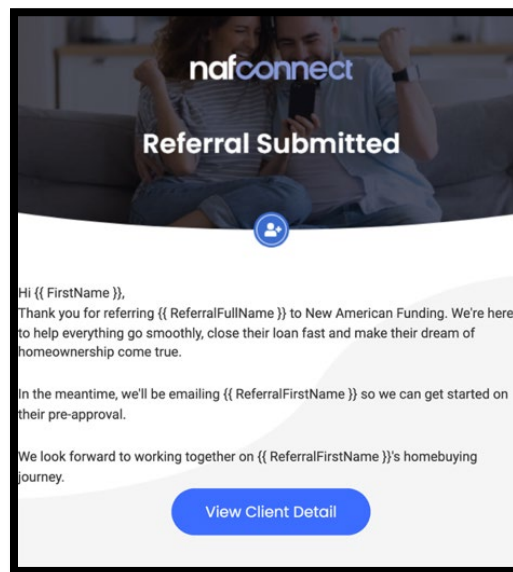


Figure 119 User Notification Email – Referral Submitted

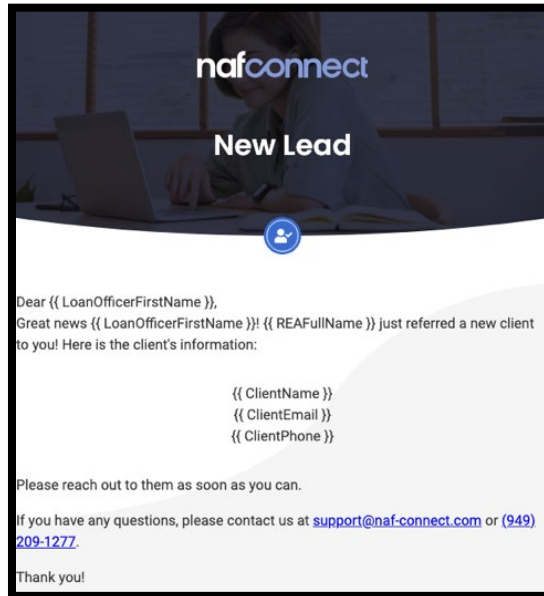


Figure 120 Loan Officer Notification Email – New Lead

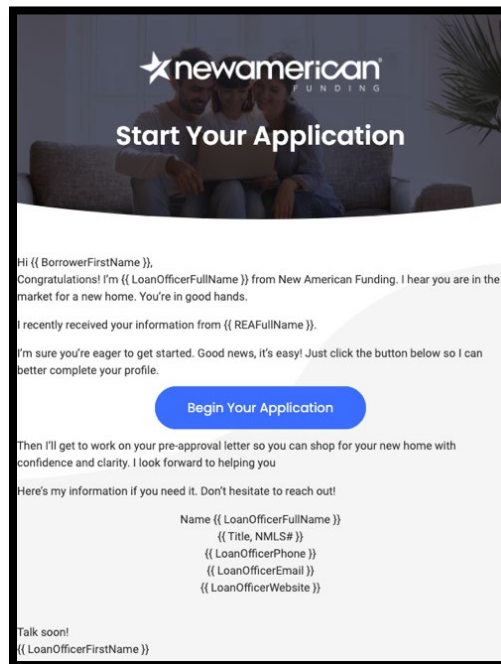


Figure 121 Borrower Notification Email – Known Loan Officer

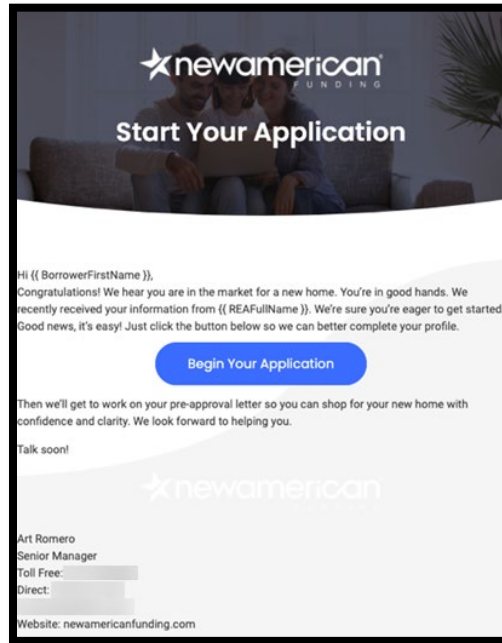


Figure 122 Borrower Notification Email – Compatible Loan Officer

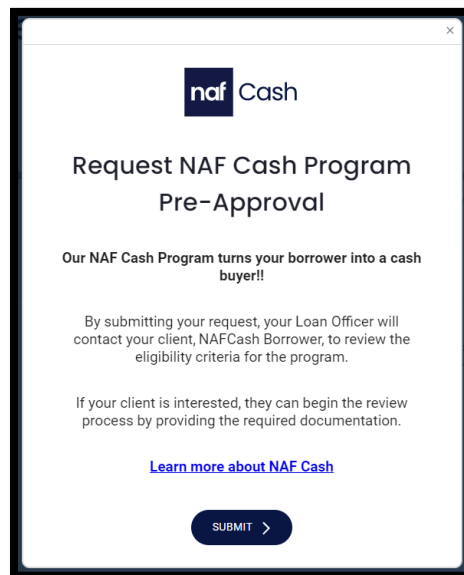


Figure 123 NAF Cash Confirmation Email

Call a Client

Perform the following tasks to call a client:

1. Select the Clients button from the **Navigation Menu** (Figure 11).
2. Navigate to the appropriate **Client Profile** (Figure 84).
3. Select the client phone number underneath the client name (Figure 124). The **Dialing Options** display (Figure 125).

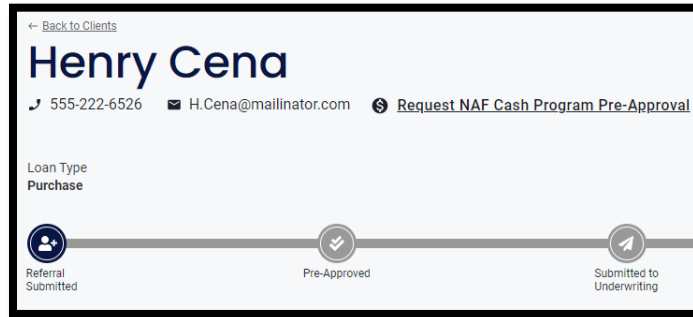


Figure 124 Client Profile – Client Contact Information

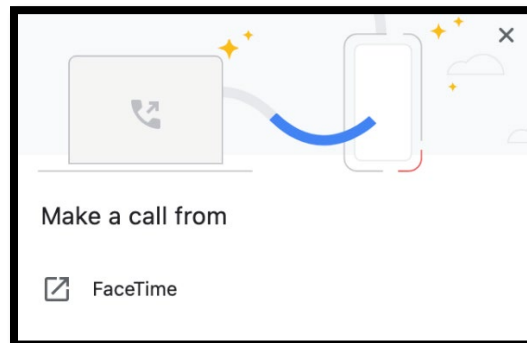


Figure 125 System Dialing Options

4. Select the appropriate option to call the client (Figure 125).

Email a Client

Perform the following tasks to email a client:

1. Select the Clients button from the Navigation Menu.
2. Navigate to the appropriate **Client Profile** (Figure 84).
3. Select the client email address (Figure 124). The system-preferred email system displays (Figure 126).

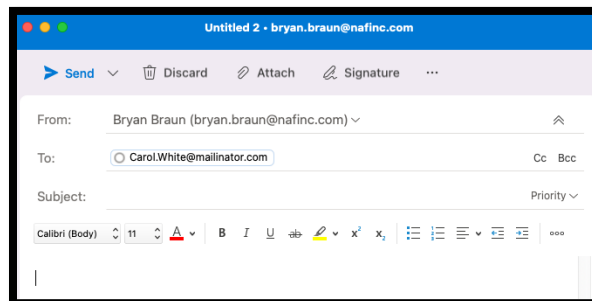


Figure 126 Blank Email Message

4. Type the appropriate information and message into the appropriate textboxes (Figure 126).
5. Select the **Send** button (Figure 126).