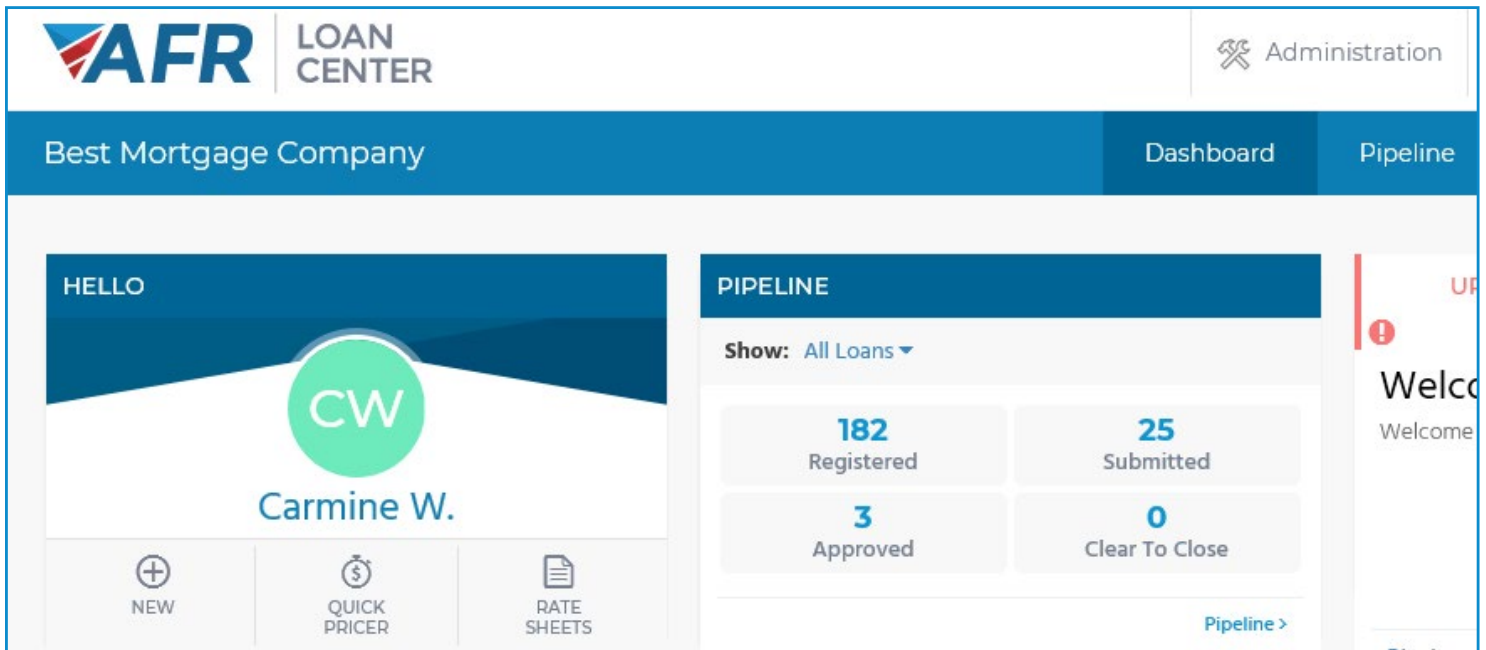


How to Create Custom Assignment Templates in Loan Center:

Loan Center supports customized Assignment templates used to send borrower(s) requests for information and or acknowledgments. From Loan Center, Associates can send Assignments to Borrower(s) using the Assignment Feature. Assignment Templates will provide Associates with a more efficient way of requesting documentation and standard assignments.

System Admins have access to this feature.

- Click Administration Tab



The screenshot shows the AFR Loan Center interface. At the top, there's a header with the AFR logo and 'LOAN CENTER' text. To the right of the header is an 'Administration' tab with a wrench icon. Below the header, there's a navigation bar with 'Best Mortgage Company', 'Dashboard', and 'Pipeline' tabs. The main content area is divided into two sections. On the left, a 'HELLO' section displays a green circular profile picture with the initials 'CW' and the name 'Carmine W.' below it. Below this are three buttons: 'NEW' (with a plus icon), 'QUICK PRICER' (with a dollar sign icon), and 'RATE SHEETS' (with a document icon). On the right, a 'PIPELINE' section shows a dropdown menu set to 'All Loans'. Below this are four summary cards: '182 Registered', '25 Submitted', '3 Approved', and '0 Clear To Close'. At the bottom right of the pipeline section is a link that says 'Pipeline >'. On the far right edge, a partial view of a 'Welcome' message is visible.



LOAN CENTER

- Click MyLoanCenter tab and scroll to Assignment Templates. You can create new assignments templates and then modify them.
- To create a new Assignment Template click **CREATE TEMPLATE**.

AFR LOAN CENTER

Administration CW Carmine W. ?

Best Mortgage Company Dashboard Pipeline Resource Center Contact Us

MyLoanCenter™

MyLoanCenter™ is the borrower-facing companion web app for AFR Loan Center. Configurable right here in AFR Loan Center, MyLoanCenter™ enables your borrowers to view their loan status, details, and documents. If enabled, borrowers can even upload documents to satisfy the “Borrower Assignments” you create for them. MyLoanCenter™ streamlines the mortgage process by offering a unifying experience for you and your borrowers.

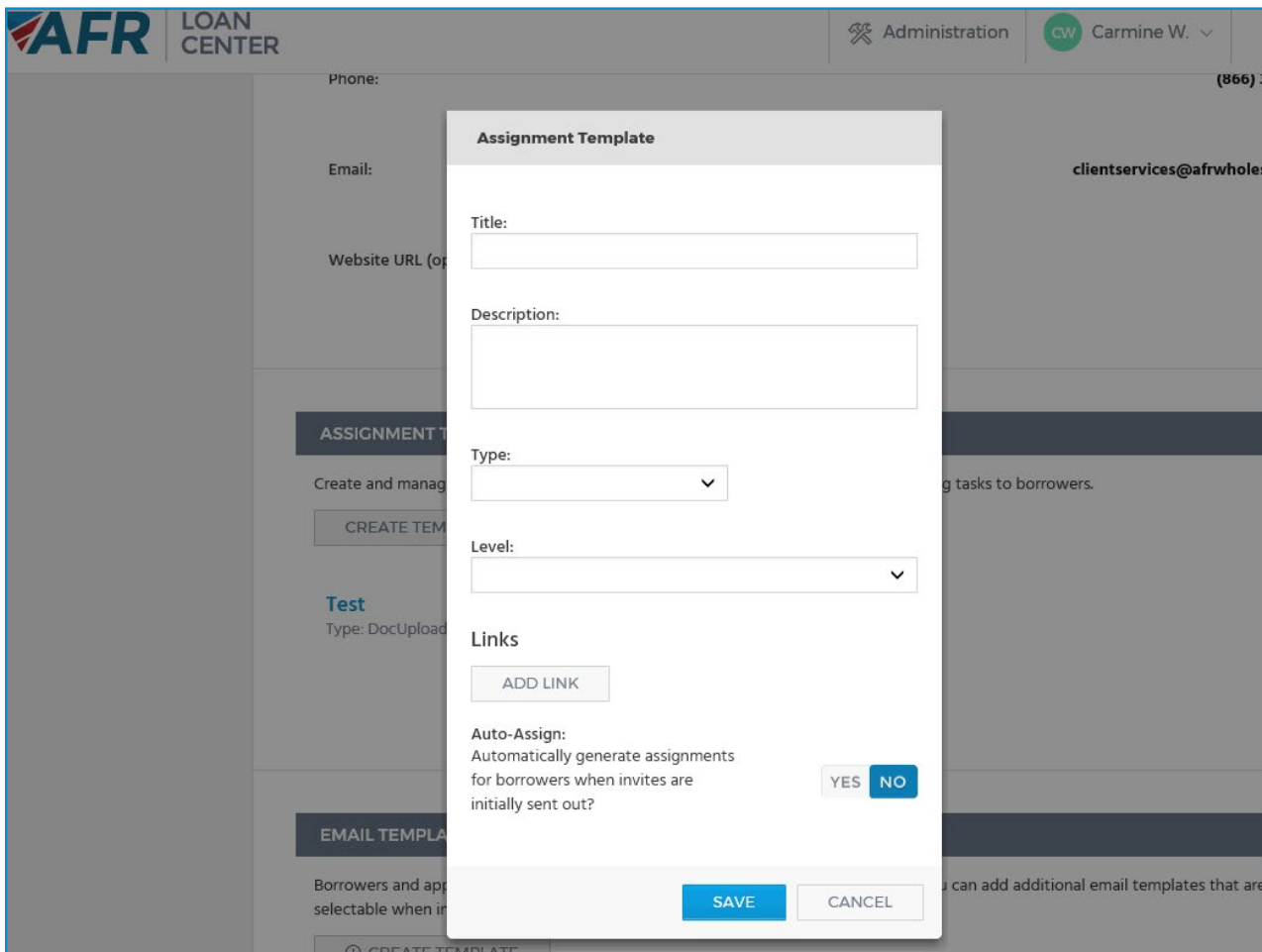
MYLOANCENTER VERSION

ASSIGNMENT TEMPLATES

Create and manage pre-defined assignments to help streamline the process of assigning tasks to borrowers.

CREATE TEMPLATE

- Complete the required Fields:
 - **TITLE** – This is the name that will appear in Template Assignment. Associates can click on the name to select it.
 - **DESCRIPTION** – Describe what you would like the Borrower(s) to do. This will display in the Assignment to the recipients.
 - **TYPE** – Click the drop-down menu and choose the type of assignment.
 - **LEVEL** – Click the drop-down menu and select who will receive this Assignment. This can be edited when the Associate is sending the Assignment.
 - **LINKS** – When you click on ADD LINK, you can enter a URL and Text. The borrower(s) can click on the link.
 - **AUTO-ASSIGN** – If enabled, this feature automatically generates assignments for borrowers when invites are initially sent out. This is an excellent feature for automated contacts that are completed on all loans.

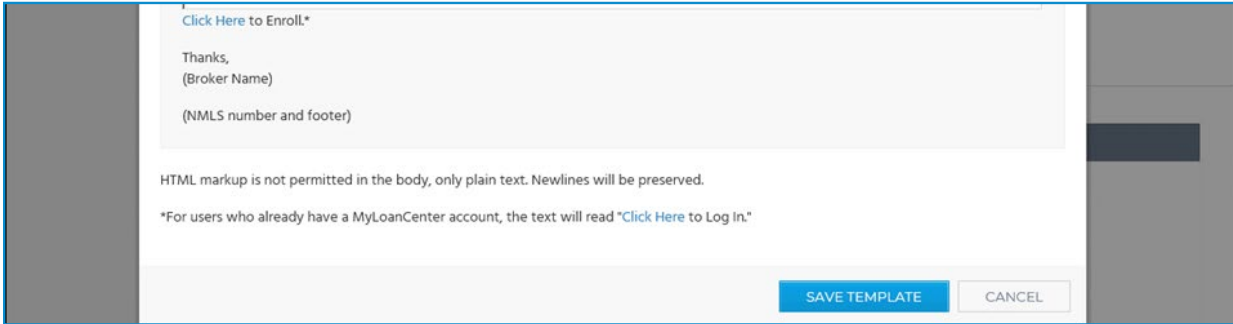


The screenshot shows the 'Assignment Template' modal form in the AFR Loan Center interface. The form is overlaid on a blurred background of the main application. The modal has a title bar 'Assignment Template' and contains the following fields and controls:

- Title:** A text input field.
- Description:** A larger text area for description.
- Type:** A dropdown menu.
- Level:** A dropdown menu.
- Links:** A section with an 'ADD LINK' button.
- Auto-Assign:** A section with the text 'Automatically generate assignments for borrowers when invites are initially sent out?' and two radio buttons labeled 'YES' and 'NO'.
- Buttons:** 'SAVE' and 'CANCEL' buttons at the bottom.

The background interface shows the 'AFR LOAN CENTER' header, a user profile 'CW Carmine W.', and a sidebar with options like 'ASSIGNMENT T', 'Create and manag', 'CREATE TEM', 'Test', and 'EMAIL TEMPLA'.

- Once the **Assignment Template** is created, click **SAVE TEMPLATE**.



Click Here to Enroll.*

Thanks,
(Broker Name)

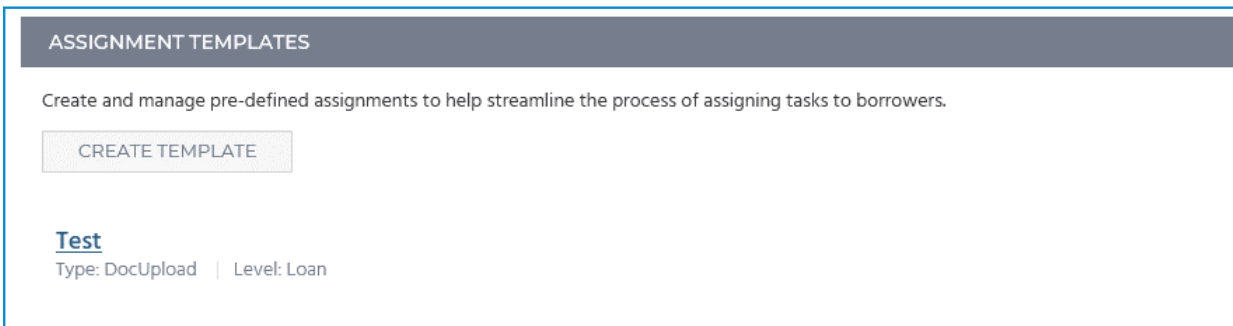
(NMLS number and footer)

HTML markup is not permitted in the body, only plain text. Newlines will be preserved.

*For users who already have a MyLoanCenter account, the text will read "Click Here to Log In."

SAVE TEMPLATE **CANCEL**

- To edit the **Assignment Template**, click the **Assignment** and **Save** changes when completed.



ASSIGNMENT TEMPLATES

Create and manage pre-defined assignments to help streamline the process of assigning tasks to borrowers.

CREATE TEMPLATE

Test
Type: DocUpload | Level: Loan