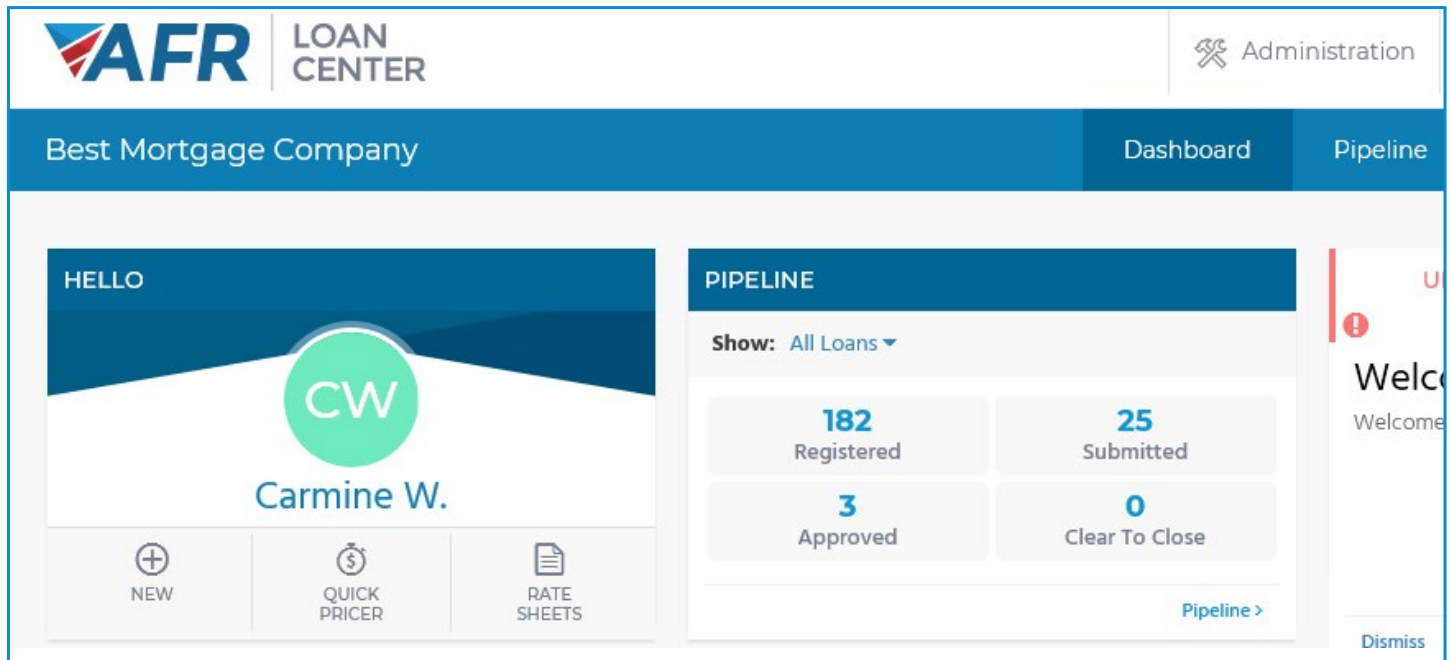


## How to Create Custom Email Templates in Loan Center:

Loan Center supports customized email templates used to invite borrower(s) to MyLoanCenter. This will provide you with the flexibility to brand your own message directed towards the recipient. This tutorial will walk you through the steps in setting up Email Templates.

System Admins have access to this feature.

- Click Administration Tab










The screenshot shows the AFR Loan Center interface. At the top, the AFR logo and 'LOAN CENTER' are displayed. A navigation bar includes 'Administration' (selected), 'Best Mortgage Company', 'Dashboard', and 'Pipeline'. The main content area is divided into two sections. On the left, a 'HELLO' greeting is followed by a green circular profile picture with 'CW' and the name 'Carmine W.'. 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, the 'PIPELINE' section shows a dropdown menu set to 'All Loans'. Below this are four statistics: '182 Registered', '25 Submitted', '3 Approved', and '0 Clear To Close'. A 'Pipeline >' link is at the bottom right of the pipeline section. A partial view of a 'Welcome' message is visible on the far right.



# LOAN CENTER

- Click **MyLoanCenter tab** and scroll to Email Templates. You can create new templates and then modify them. Default Email Templates can't be modified.
- To create a new Email template click Create Template.

The screenshot shows the AFR Loan Center interface. The top navigation bar includes the AFR logo, 'LOAN CENTER', and user information (Administration, Carmine W.). The main header features 'Best Mortgage Company' and navigation links for Dashboard, Pipeline, Resource Center, and Contact Us. A left sidebar lists various management options: MyLoanCenter™, Manage Users, Add Users, Manage Teams, Create Teams, Company Settings, Manage Branches, Manage Roles, and Compensation. The main content area is titled 'MyLoanCenter™' and provides a description of the borrower-facing web app. Below this, there are sections for 'MYLOANCENTER VERSION' and 'EMAIL TEMPLATES'. The 'EMAIL TEMPLATES' section includes a 'CREATE TEMPLATE' button and a table of existing templates.

EMAIL TEMPLATES	
Borrowers and applicants are sent email invitations to enroll in MyLoanCenter. Here you can add additional email templates that are selectable when inviting new users to enroll in MyLoanCenter™.	
<a href="#">+ CREATE TEMPLATE</a>	
Template	
Default Loan Invitation	 
Default Online Application Invitation	 
Collection Session	  

- AFR

LOAN  
CENTER

Administration

CW Carmine W. ▾

1

Create New Email Template

YES NO

Email Template Name

Email Subject

Email Body Content

Dear (Borrower Name),

[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

YES NO

EDIT

66) 372-6596

holesale.com



# LOAN CENTER

- Once the **Email Template** is created, click **EMAIL ICON** to test the email, should you need to edit the template, click the EDIT ICON and save changes when completed. To delete the template, click **DELETE ICON**.
- Email Templates** are available when an invitation is being sent.

### EMAIL TEMPLATES

Borrowers and applicants are sent email invitations to enroll in MyLoanCenter. Here you can add additional email templates that are selectable when inviting new users to enroll in MyLoanCenter™.

⊕ CREATE TEMPLATE

Template

Default Loan Invitation			
Default Online Application Invitation			
Collection Session			