

BORROWER GETTING STARTED GUIDE

USER INSTRUCTIONS

- Once you click on your link, your browser will open to the **"Sign In"** page. As a first time user, you will click **"Create an account"** and complete the **"Registration"** page. Once you click **"Submit"** on your registration page, you will be sent to your questionnaire.

The image shows two side-by-side screenshots of a web application. The left screenshot is the 'Sign in' page, featuring input fields for 'E-mail' and 'Password', a 'LOGIN' button, and a 'CREATE AN ACCOUNT' button. A large red arrow points from the 'CREATE AN ACCOUNT' button to the right screenshot. The right screenshot is the 'Registration' page, which includes input fields for 'E-mail', 'First name', 'Last name', 'Password', and 'Confirm password', followed by a checkbox for terms and conditions, a 'SUBMIT' button, and a disclaimer about the application's purpose.

- Within the questionnaire, the section on the left hand side of the screen is highlighted to show where you are at in the process. You can click the **"Back"** button to return to the previous question or click **"Save & Continue"** to move to the next question. At any time, you can click **"Exit Questionnaire"** and return to your dashboard. NOTE: All your information will be saved from the last screen that you clicked **"Save & Continue"**

The image is a screenshot of a web application's questionnaire interface. On the left, a sidebar lists six sections: 'Personal Information', 'Property Owned', 'Mortgage and Terms', 'Assets & Liabilities', 'Income', and 'Declaration Questions'. The 'Personal Information' section is highlighted. The main content area is titled 'What states are you looking to finance in?' and contains a dropdown menu with a list of US states (Alabama through Florida) and an empty text input field. At the bottom, there are three buttons: 'Back', 'Save & Continue', and 'Exit Questionnaire'. Red arrows indicate the flow: one points from the 'Back' button to the left, another points from the 'Save & Continue' button to the right, and a third points from the 'Exit Questionnaire' button to the right.

- Your information will be saved after each question you answer, so don't worry about running out of battery, dropping wifi signal, closing the window on accident, or logging out and returning later- **EVERYTHING IS SAVED**. If you are Logged Off the system, follow the steps below to pick up where you left off:
 - Click the link I sent you

2. Sign in using your email and password from when you registered your account (or click forgot password)
3. Click the **"Action"** button on your dashboard

Your Loan Originator:
Eric OBrien
NMMLS: 1973
Phone: 603-674-0299
Email: eric@perfectlo.com

Dashboard Hello, Jim! Log off

Questionnaires

Create New

Legal First Name	Legal Last Name	Email Address	Status	
Jim	Beam	jbeam@yahoo.com	Not Submitted	Action ▾

4. You have the following options under **"Action"**
 - **Edit Contact Info:** Clicking here allows you to edit your contact information.
 - **Beginning:** Clicking here will bring you to the beginning the questionnaire.
 - **Resume:** Clicking here will bring you to the last question that you saved within the questionnaire.
 - **Submit Questionnaire to Loan Originator:** Clicking here gives you the option to submit the questionnaire to me
 - **Document Checklist:** Clicking here allows you to save, view or print your checklist of documents that will need to be sent to me

Your Loan Originator:
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NMMLS: 1973
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Questionnaires

Create New

Legal First Name	Legal Last Name	Email Address	Status	
Jim	Beam	jbeam@yahoo.com	Not Submitted	Action ▾

Edit Contact Info

Beginning

Resume

Submit Questionnaire to Loan Office

Document Checklist

- Once you submit the questionnaire, you will see the confirmation screen below and have the option to view or print the checklist of documents that will be needed based on your answers by clicking **"Download Checklist"**. This checklist is also saved and available on your dashboard under the **"Action"** button as described above.

Your Loan Originator:
Eric OBrien
NMMLS: 1973
Phone: 603-674-0299
Email: eric@perfectlo.com

Dashboard Hello, Jim! Log off

Your questionnaire was submitted successfully.

We created a checklist for you.

You'll need to provide these documents to your Loan Originator.

Download Checklist

Done