Jen: Okay, this is the 'needs' section. If you notice, up here there are a lot of little quick links, that you're going to see in all the pages. This is the 'needs', this is the exit back to the search of your pipeline, this is your task, this is the...shoot I can't remember, hover over that. [inaudible 00:00:20]... What's that one again?

Speaker 2:   This is the-

Speaker 3:   The proposal.

Speaker 2:   -the proposal. That is something we'll have.

Jen: Okay. And then, the full app, the notes, and save. So, in your needs, this is what we clicked on to get in here, the needs are going to be automatically, that we've already set up to be system generated, based upon where it's at in the process. So, you're gonna see, this initial needs group came in because it's already been through that first little process. So now, these initial needs group will also show up on the bar with portal.

Jen: But, like you were saying, and I'm sorry I didn't catch your name, but how you add a need if you want to get something specific, you come up here and click this 'add need' button, and then you can choose, in here, when you want this due. So, if you tell that bar 'I need this by Friday', you can put that due date in by Friday, and that will show up to them. You can put in the description, just... driver's license, that's gonna be in, one of the automatic ones, but, you can say driver's license. And then the internal description? That is something that you just see, internally, so, maybe its... make sure it's front and back copy, and clear, legible, not cut off, or something like that.

Jen: In this dropdown, for the needs type? You can choose whatever it is in reference to, whether its financial, property, mortgage, borrower, so if it was a driver's license you could probably just choose borrower.

Jen: You could also click... if you had a sample to show them, of what you needed, you could give them a sample, because we all know borrowers are notorious for not giving us what we've actually asked them for. So, you can actually, give them a sample of... This is what it should look like.

Speaker 4:   And you can leverage that also, not just as a sample, if you have a phone you want to send them, an excel sheet. Say you want them to give you a list of 50 properties that are part of their portfolio, is reoccurring, any type of document that you want to send to them, that is a file, obviously, these regular files work for excel, you can send it to them, so they can download it, fit it, and then save it, and upload it back to you.

Jen: Now, I will tell you, if you click on this little check box, internal need, maybe it's just something that you know you need to do, before you put, you need to

upload something before you send it on to the next person in the process flow. So, maybe it's a particular checklist that you guys require, as a company.

Jen: You could put that need in there for yourself and mark it as internal, so it'll show up on a borrower portal, but it'll still show up as a need list that has to get done.

Allison Artling: And then, when we do this, how is the borrower notified?

Jen: They get an email.

Speaker 6: Great. So, when she presses save it'll be...

Jen: There's a 'add need' template set up, there's an 'add need' template, sorry, that as long as that email template is set up, they will get an email saying, 'A need has been added.'

Allison Artling: We don't have to push anything extra, if we say, we put it there, press save, it'll automatically go to them and they'll get an...

Jen: Yep.

Allison Artling: ...email saying 'give me this.'

Jen: As long as the template is active, it will go.

Jen: What was your question? Sorry.

Speaker 6: No, that was it, I was wondering if we just push save, and that's an automatic email that, that'll send.

Jen: Yes, it's basically, it's called an on-click function, so when you click that to that, that triggers that function to go send that email.

Allison Artling: Can we create, say, if we're sending a need for a bid, for a rehab project, can we have a sample uploaded in there, by default?

Speaker 4: Yep.

Jen: Yeah.

Speaker 4: You're talking about sample project plan , or sample draw schedule?

Jen: Yes.

Speaker 4: Okay, so there's, actually, two pieces in this? I will show that, here, in a second. The borrow portal, is actually part of our standard thing, you send them a sample, they fill it, they upload it to the back.

Speaker 4:	There is also, after that in the borrower portal, we give them a template, they can fill it themselves, and upload it in the draw schedule, in the [inaudible 00:04:51], and it will create the entire draw schedule, and the entire project plan for you in the system, broken down to everything you want it to.
Allison Artling:	But, if it's truly a sample, you could use this as an example, when you're creating it.
Speaker 4:	Yeah.
Allison Artling:	And so on.
Speaker 4:	Yeah, yeah. You have both. You have both options.
Allison Artling:	Thank you.
Speaker 4:	Jen?
Jen:	The next section would be, the task. So, if you click on this, like now, we don't have any tasks, in this one, but, to add a task, you just click on this. The only reason why you see two right there, is because, typically, if there was a bunch there, you would have the option to add to the top or add to the bottom. That's the only reason why they are right next to each other.
Jen:	I know, cause I've asked that question, when I saw it, at first. I said, "Why is there two?" But, when you come in here and add a task, you're gonna select who this task is going to be assigned to.
Speaker 4:	It's either this or that. You don't have to do that. You could, either, assign it to the loan, or you can assign it to a specific person, you want them to have that task to do.
Jen:	This, actually, was just updated, I haven't even seen this.
Speaker 4:	Yep. And then, you could create it for the future, or you could create it for today. So, you have an option to say, "I want something for Monday, that's due Tuesday." Or you can say something for today, that's due Friday.
Jen:	And it could be something as simple as, you want to set a task for yourself, or maybe the loan officer gets a document in, but the loan's already in processing, you could say, "I want to set a task for the loan processor to review this document." And, I'm just giving it as, a broad, example. But, whatever that case may be, you could set that task for...
Jen:	This email on task completion... That's optional. You could say, when that task is completed I want to be notified of it. So, send me a copy, send me an email telling me that they've done it. Or, you could say, send it to the underwriter,

because they've now, the processor has reviewed this document, so, I'm ready for the underwriter to look at it.

Jen: So, it could be lots of different things. Those are just quick scenarios that you could do. And if you would type, in here, what the actual task is. So...

Jen: And then if you scroll down, then hit save, and there's the tasks, on the very first task.

Jen: Yeah, then an option, there's a filter by user, as well, if you wanted to do that, so if you wanted to see what task a certain person has on that loan, and then, what is that store, I can't read that, sorry.

Speaker 4: It's just...

Speaker 4: So, you either go by all tasks or by users listed there, that they have tasks on this loan, and they're, so you can see that.

Speaker 4: There's only [inaudible 00:08:09] Admin is the test one. And then, if you create one for...

Speaker 4: I can, potentially, add another task in here, but I'm gonna assign it, now, to... I don't know

Speaker 4: [inaudible 00:08:27]

Speaker 4: I'm going to just leave this alone and create it to that...

Speaker 4: For Wednesday for completion, tell the processor, and my second task. Save it. Now, I have two tasks, if I drop down, now I see the two people. And they're on that loan that has tasks. And I can search, sort between them.

Speaker 4: There's two functions, here, that are really simple. Either you can complete it or you can say this is not applicable.

Speaker 4: So, if you push N/A, and there's gonna turn it to orange, and it just gonna say who decided that. If you say completed, it's gonna turn into green. It's done.

Jen: And you can see that the color codes are up here for you. I didn't realize this was added. I was hoping this was going to be added. This sort task vice status, it allows you to filter through, if they're completed, boom, moved to the bottom. You don't want to see them. You want to see what you have left.

Speaker 4: If it goes right, it means it was due today, or yesterday I should say, and it was not completed. So you can see that it was past due, as well, on that loan.

Speaker 4:	The key item I want to talk about that is different in tasks, is this is on the pipeline. So, now here in the pipeline, I want to see my tasks, and I'm seeing all the tasks that are available, I can sort. There's one key difference between adding a task on the pipeline versus inside the loan itself.
Speaker 4:	And that is when you add a task, in here. And there, all of a sudden from here it does not tell you what the loan numbers associated with it. Because you're outside of any loan, you're just in the general pipeline. So, if I wanted to start typing in here and I'm gonna stop typing it's gonna give me the loans I'm gonna assign it to that, so everything else is the same.
Speaker 4:	Now it adds it to that loan.
Allison Artling:	How are we notified when we have a task? If my processor asks me to do something, do I get an email, is it phone messages?
Speaker 4:	And so, the first thing that you're gonna notify in there, that should be your normal operation, is you're looking at your tasks are, right there on your pipeline, and see. It's gonna show you all the tasks that are outstanding from today, or prior to today. And if you wanna see future tasks that might be assigned to you, you click on that, choose date over here, and say show me everything as of the 19th, and if there's anything in there on the 19th and before, is gonna show these additional tasks. That's a ballot.
Speaker 4:	But, there is, I think, a task added trigger, also, that you can have an email audit. I don't remember. So, we can even have you get an email that task has been added.
Allison Artling:	I just added a task to my little bunny file, but if I go to my pipeline, it's not showing up in my tasks. Shouldn't it?
Speaker 2:	Did you view tasks?
Speaker 2:	You have to go to view tasks, on the menu bar.
Allison Artling:	Then, my tasks[crosstalk 00:12:06]?
Speaker 4:	Okay, where? Let me see.
Speaker 4:	Okay.
Allison Artling:	Right, and then-
Speaker 4:	I'm showing you. I'm sorry what's your name?
Allison Artling:	Allison. Allison Artling.

Speaker 4:	Okay, and you said you added a task?
Allison Artling:	I did. Maybe I didn't add it correctly?
Speaker 2:	You save it?
Speaker 4:	[inaudible 00:12:26] Did you save it?
Speaker 3:	The save button takes a genius.
Allison Artling:	It shows that in the file...
Jen:	I'll come take a look at it.
Speaker 4:	Okay, Hold up. When did you add it for?
Allison Artling:	I don't think I put a date on there.
Speaker 4:	Okay, that's why you, so you have it forever for the future, so it'll never show up. You have to put a sure date.
Allison Artling:	You have to put a date.
Speaker 4:	You have to put a date, otherwise it's like you didn't say when it's due.
Allison Artling:	Okay.
Speaker 4:	So, this here, looks at everything, as of today and prior. So it shows all your current tasks.
Jen:	That's one [crosstalk 00:13:00]
Speaker 4:	Or, if you give it a future date, you can tell it, hey show me all the tasks that are due as of November 1st.
Allison Artling:	So you can't use it as a to do list. It would be-
Speaker 4:	Yeah.
Allison Artling:	Specific tasks.
Jen:	You can, but-
Speaker 4:	You can, you just have to assign-
Allison Artling:	You just have to assign a date to it?

Speaker 4:	Yeah.
Jen:	You have to give yourself a due date. I'm not gonna give you a task without telling you when I need it done.
Allison Artling:	Oh, it automatically populated to be due date for tomorrow, the 4th.
Speaker 4:	Okay, so that's probably, if you go back in here tomorrow, you're gonna see it.
Jen:	So if you look at your future, did you try putting in a future date?
Allison Artling:	Okay.
Speaker 4:	Yeah, it's...
Speaker 4:	Yeah.
Jen:	So that in my task, where you did the date right there, plug in tomorrow's date.Or even Saturday.
Speaker 4:	Yeah, but this..
Speaker 4:	It's not refreshing for some reason, so that's why it won't show up for a future date on this, but I bet you tomorrow you come in and you gonna see it on that one.
Speaker 3:	I got an email saying that you added my task.
Speaker 4:	Oh, you did?
Speaker 3:	Yep, I [crosstalk 00:14:10]
Speaker 4:	Okay, I was gonna say that, do we have a task [inaudible 00:14:13] so, I added a task, you got it.
Speaker 3:	Yep.
Jen:	Did you get an email? Allison? When you added it? Did you assign it to yourself?
Allison Artling:	I did. Greg saw it on his, but I don't see it on mine.
Jen:	I'll come look at it.
Speaker 4:	Alright.
Speaker 3:	On the my [inaudible 00:14:33]-

Jen: Yeah.

Speaker 3:   With all the search stuff, is there a way to, because its showing all the ones from everybody. How do you get it to just show all of your loans, without having to individually search?

Jen: I will come help you, just because we are on time constraints with the video. I'll come back help you real quick.

Speaker 4:   Yeah, [crosstalk 00:14:53] you gonna create-