

Creating a New File

Khafre
File and Document Management System

Branch Manager Trainer - Training Branch - Branch Administrator

Distressed Mortgage System

Alerts/Reminders
Notes
Homeowner Info
Subject Property
+ Add Mortgage
Debts
Assets
Expenses
Branch-Level Tags
Exhibits List
File Usage
Merged Documents List

Please note the screen changes
1.) You are now in the "Distressed Mortgage System" This is where you create and edit files.
2.) The new Left Panel Menu

The Alerts/Reminders, Notes, Exhibits List, File Usage and Merged Documents List, buttons are grayed out and the name of the file is "My File". This will change once you have entered a home owners first and last name.

Tip: You can view Khafre in Full Screen "Kiosk" mode by pressing F11. You press F11 again to get out of "Kiosk" mode.

Close All

Auto-Save My File Save

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Homeowner Information

Borrower B. Employment B. Misc. Inc Co-Borrower Co.B. Employment Co.B. Misc. Inc Household

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Creating a file in the Distressed Mortgage System
Step 1: Click the "Homeowner Info" button on the Left Panel Menu
Step 2: Input First and Last Name of Homeowner
Step 3: Click "OK"

*When you click "OK" the "Homeowner Information" screen will disappear. You can bring it back by clicking the "Homeowner Info" button on the Left Panel Menu.

** You can avoid the window closing by clicking the blue "Pin Down" button on the bottom left of the box. Remember to "Unpin" if you would like to close the box

Note the name of the file has changed to the homeowners first and last name and the Left Panel Menu Buttons are no longer grayed out.
If you would like to change or add to the file name just type in the green box and click "Save"

First Name: Sarah MI: P
Last Name: Test Suffix:
Mailing Address:
Mailing Address 2:
City:
State: --- Please Choose ---
Zip:
County:
Email:
Date of Birth:
SSN:
Primary Language: English
Work Phone: Ext:
Home Phone:
Cell Phone:
Preferred Time to Call: --- Please Choose ---
Preferred Phone: --- Please Choose ---
Credit Rating: --- Please Choose ---
Credit Score:

Close All

Auto-Save Sarah Test OK Cancel Save