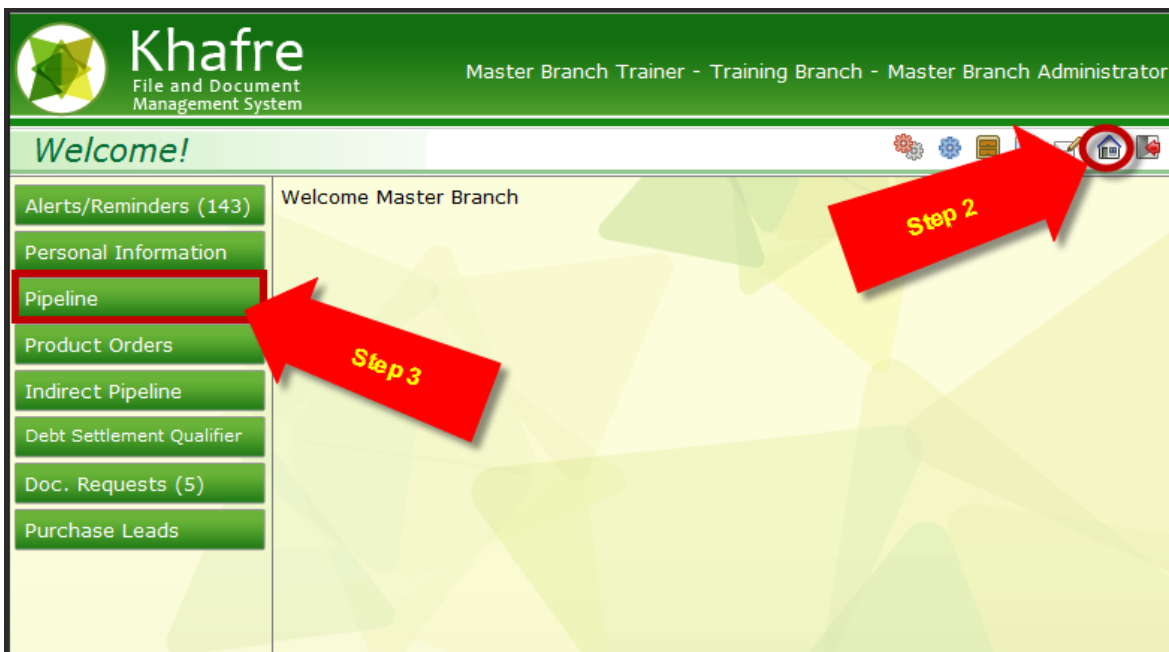


How To Add an Alert/Reminder to a Client File

1. Log in to Khafre at <http://www.khafreonline.com/app>

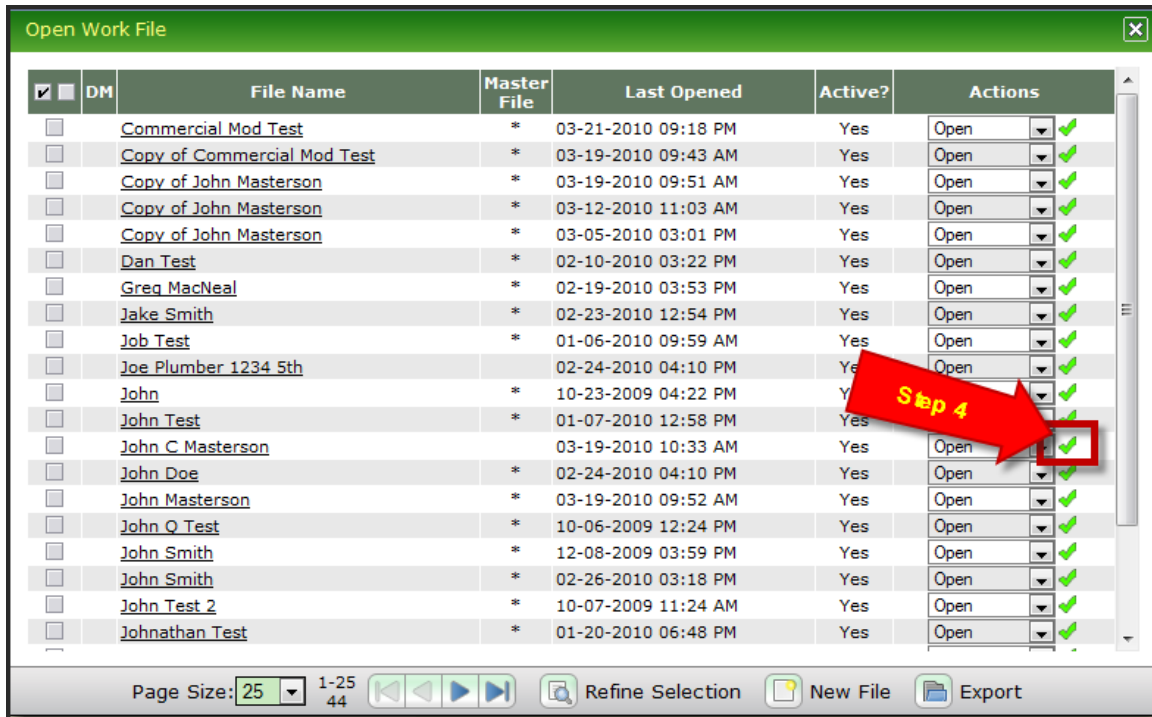


2. Click the home icon in the upper right corner of the screen
 - The Welcome! screen displays



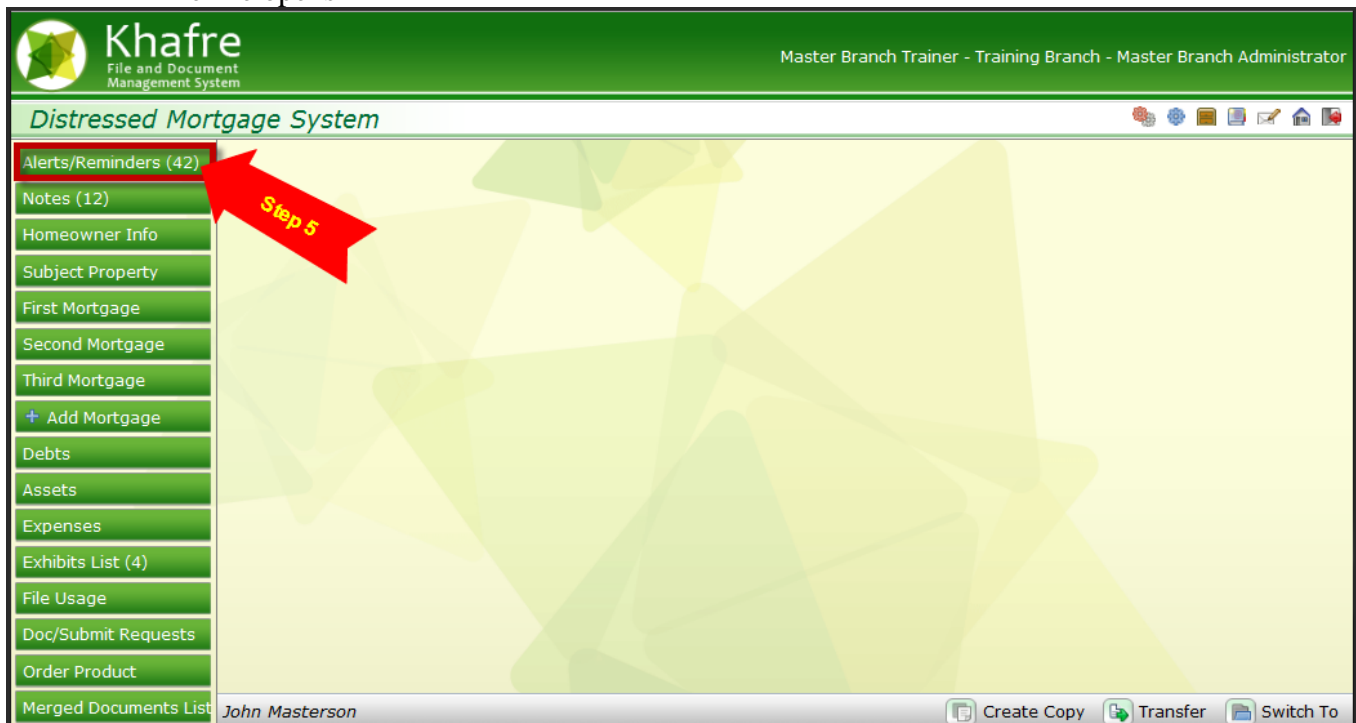
3. Click the Pipeline tab in the left-hand navigation menu

- The Open Work File dialog box displays



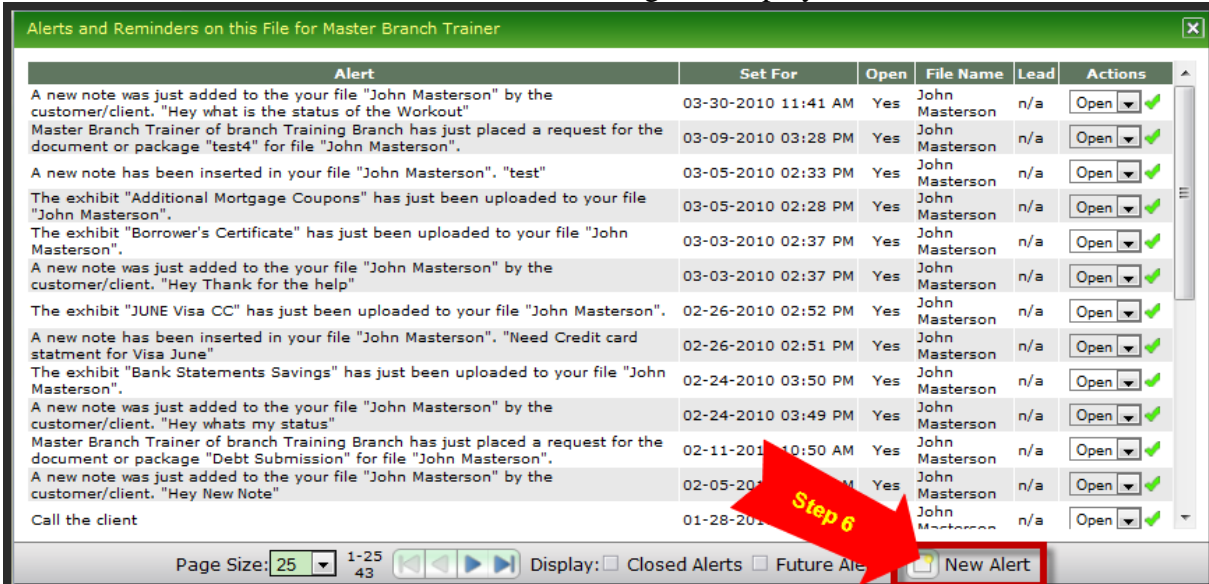
4. Click the green check to the right of the file you wish to open

- The file opens



5. Click the Alerts/Reminders tab in the left hand navigation menu

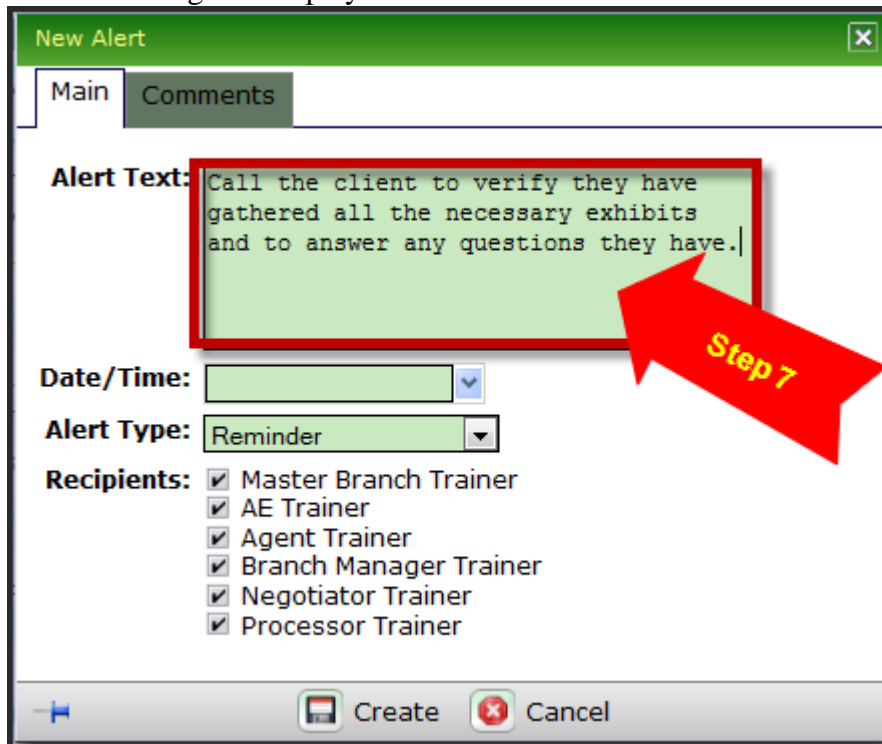
- The Alerts and Reminders on this File dialog box displays



Alert	Set For	Open	File Name	Lead	Actions
A new note was just added to the your file "John Masterson" by the customer/client. "Hey what is the status of the Workout"	03-30-2010 11:41 AM	Yes	John Masterson	n/a	Open [v] ✓
Master Branch Trainer of branch Training Branch has just placed a request for the document or package "test4" for file "John Masterson".	03-09-2010 03:28 PM	Yes	John Masterson	n/a	Open [v] ✓
A new note has been inserted in your file "John Masterson". "test"	03-05-2010 02:33 PM	Yes	John Masterson	n/a	Open [v] ✓
The exhibit "Additional Mortgage Coupons" has just been uploaded to your file "John Masterson".	03-05-2010 02:28 PM	Yes	John Masterson	n/a	Open [v] ✓
The exhibit "Borrower's Certificate" has just been uploaded to your file "John Masterson".	03-03-2010 02:37 PM	Yes	John Masterson	n/a	Open [v] ✓
A new note was just added to the your file "John Masterson" by the customer/client. "Hey Thank for the help"	03-03-2010 02:37 PM	Yes	John Masterson	n/a	Open [v] ✓
The exhibit "JUNE Visa CC" has just been uploaded to your file "John Masterson".	02-26-2010 02:52 PM	Yes	John Masterson	n/a	Open [v] ✓
A new note has been inserted in your file "John Masterson". "Need Credit card statement for Visa June"	02-26-2010 02:51 PM	Yes	John Masterson	n/a	Open [v] ✓
The exhibit "Bank Statements Savings" has just been uploaded to your file "John Masterson".	02-24-2010 03:50 PM	Yes	John Masterson	n/a	Open [v] ✓
A new note was just added to the your file "John Masterson" by the customer/client. "Hey whats my status"	02-24-2010 03:49 PM	Yes	John Masterson	n/a	Open [v] ✓
Master Branch Trainer of branch Training Branch has just placed a request for the document or package "Debt Submission" for file "John Masterson".	02-11-2010 10:50 AM	Yes	John Masterson	n/a	Open [v] ✓
A new note was just added to the your file "John Masterson" by the customer/client. "Hey New Note"	02-05-2010 10:50 AM	Yes	John Masterson	n/a	Open [v] ✓
Call the client	01-28-2010 10:50 AM	Yes	John Masterson	n/a	Open [v] ✓

Page Size: 25 | 1-25 / 43 | Display: Closed Alerts Future Alerts New Alert

- Click the New Alert button
 - The New Alert dialog box displays



New Alert

Main | Comments

Alert Text: Call the client to verify they have gathered all the necessary exhibits and to answer any questions they have.

Date/Time: [] [v]

Alert Type: Reminder [v]

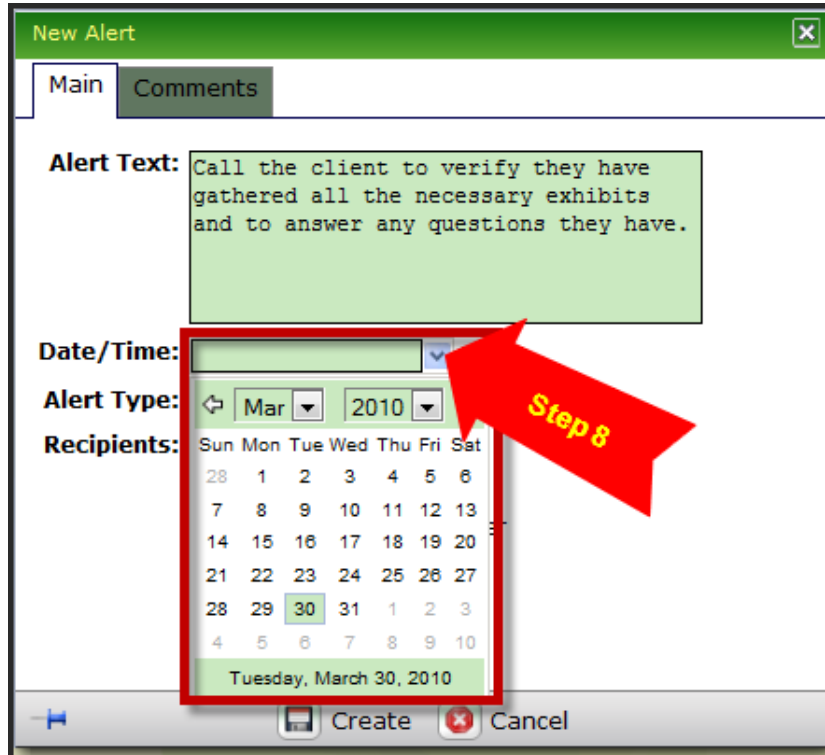
Recipients:

- Master Branch Trainer
- AE Trainer
- Agent Trainer
- Branch Manager Trainer
- Negotiator Trainer
- Processor Trainer

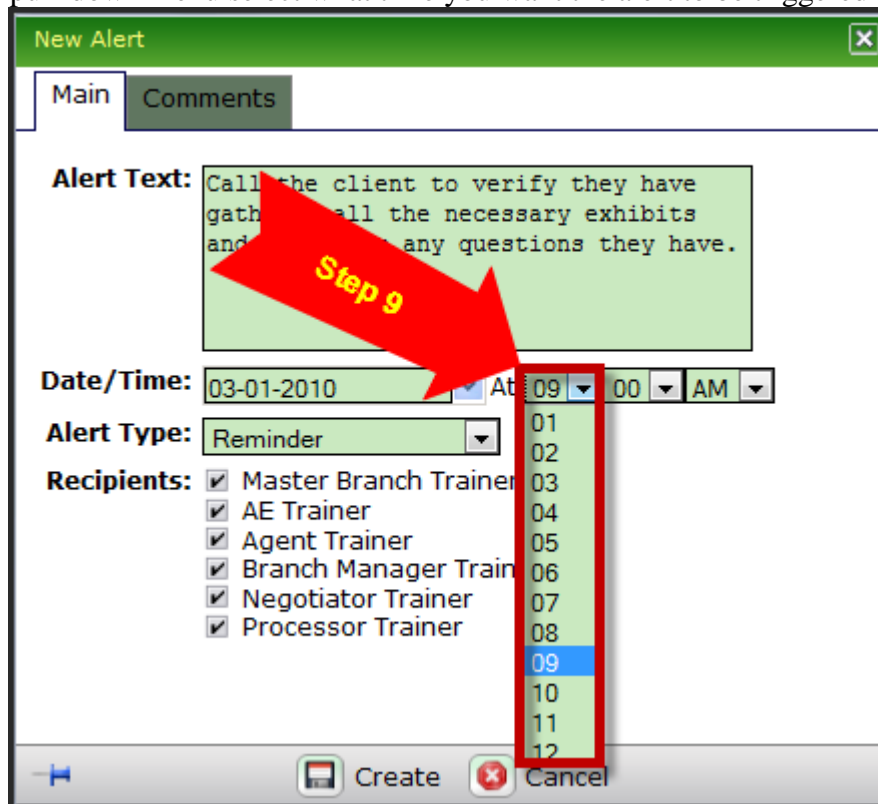
[] Create [x] Cancel

- Enter the text you want displayed when the alert is triggered

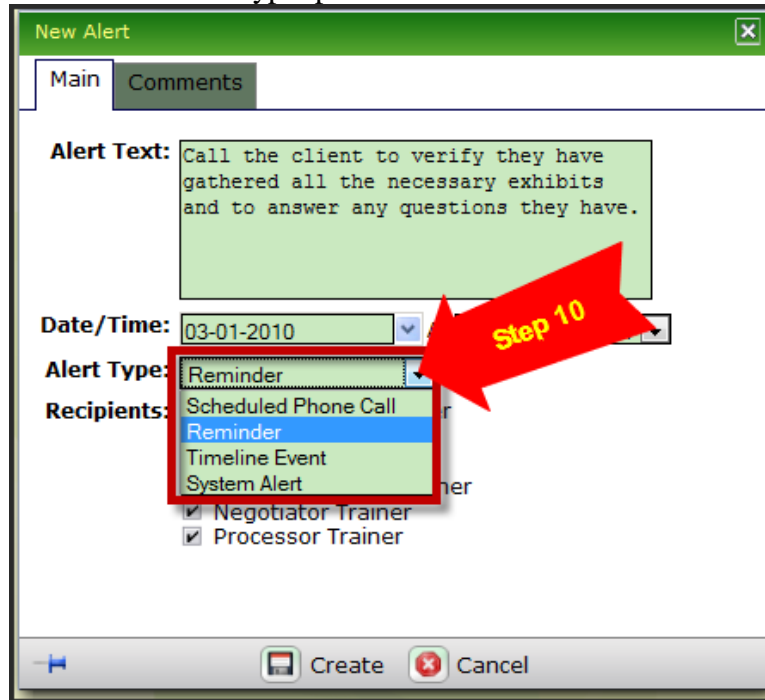
8. Using the Date/Time: pull-down calendar select the date you want the alert to be triggered



9. Using the Time pull-down menu select what time you want the alert to be triggered

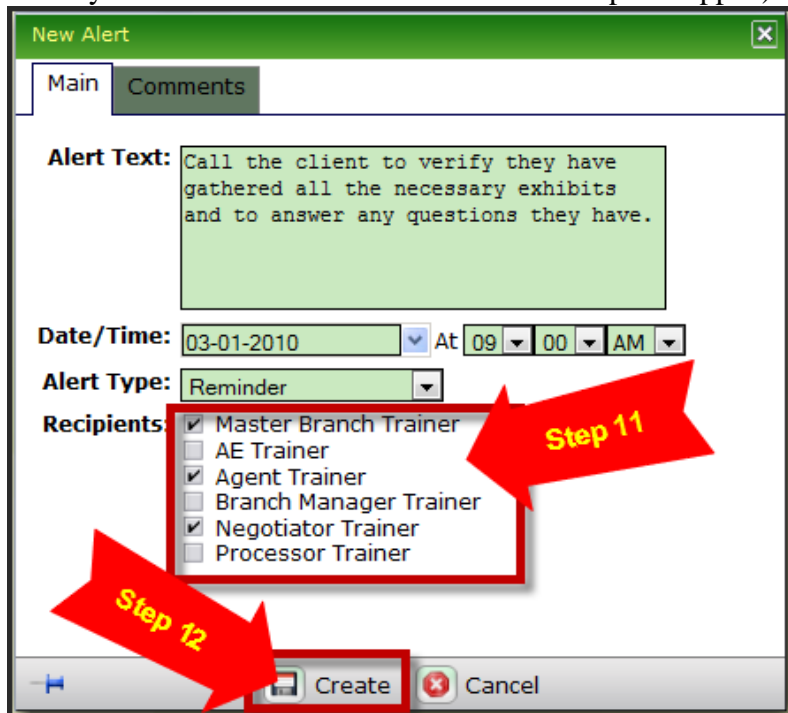


10. Select the type of alert from the Alert Type: pull-down menu



The screenshot shows the 'New Alert' dialog box with the 'Alert Text' field containing the text: 'Call the client to verify they have gathered all the necessary exhibits and to answer any questions they have.' The 'Date/Time' is set to '03-01-2010'. The 'Alert Type' dropdown menu is open, showing options: 'Reminder' (selected), 'Scheduled Phone Call', 'Timeline Event', and 'System Alert'. Below the dropdown, there are checkboxes for 'Negotiator Trainer' and 'Processor Trainer', both of which are checked. A red arrow labeled 'Step 10' points to the 'Alert Type' dropdown menu. The 'Create' and 'Cancel' buttons are visible at the bottom.

11. Select which persons should receive this alert when it is triggered by checking the appropriate boxes.
(NOTE: If you are the only authorized user of this file then this step is skipped)



The screenshot shows the 'New Alert' dialog box with the 'Alert Text' field containing the text: 'Call the client to verify they have gathered all the necessary exhibits and to answer any questions they have.' The 'Date/Time' is set to '03-01-2010' at '09:00 AM'. The 'Alert Type' is set to 'Reminder'. The 'Recipients' list is expanded, showing checkboxes for 'Master Branch Trainer', 'AE Trainer', 'Agent Trainer', 'Branch Manager Trainer', 'Negotiator Trainer', and 'Processor Trainer'. The checkboxes for 'Master Branch Trainer', 'Agent Trainer', 'Negotiator Trainer', and 'Processor Trainer' are checked. A red arrow labeled 'Step 11' points to the 'Recipients' list. Another red arrow labeled 'Step 12' points to the 'Create' button. The 'Create' and 'Cancel' buttons are visible at the bottom.

12. Click the Create button