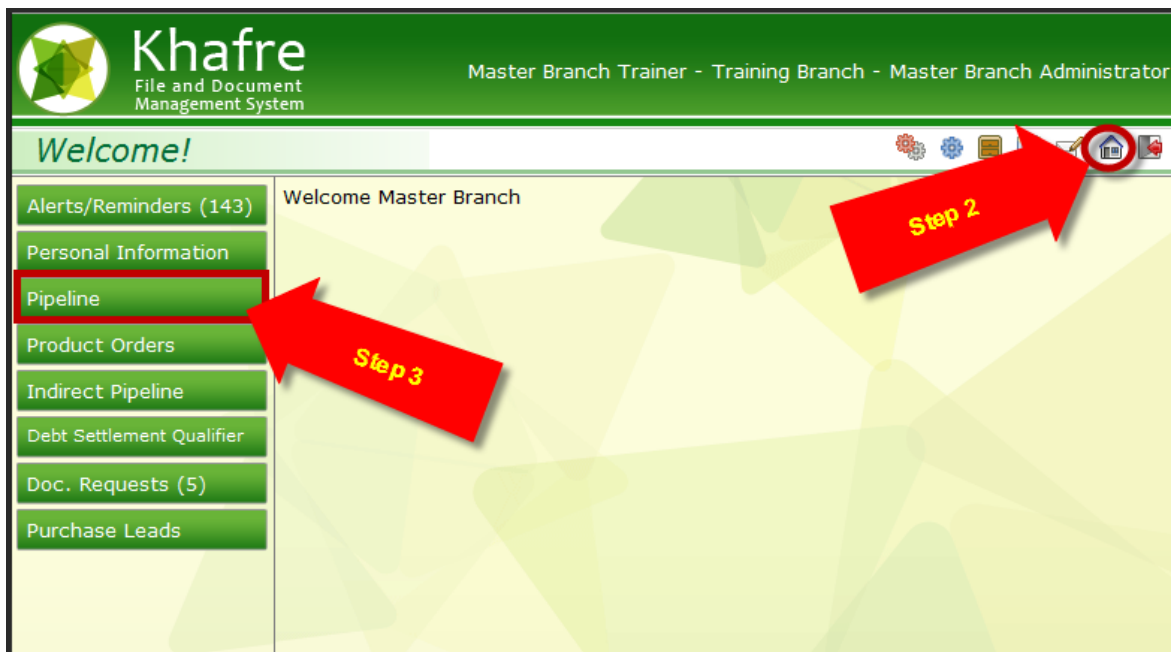


How To Add a Note to a Client File

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

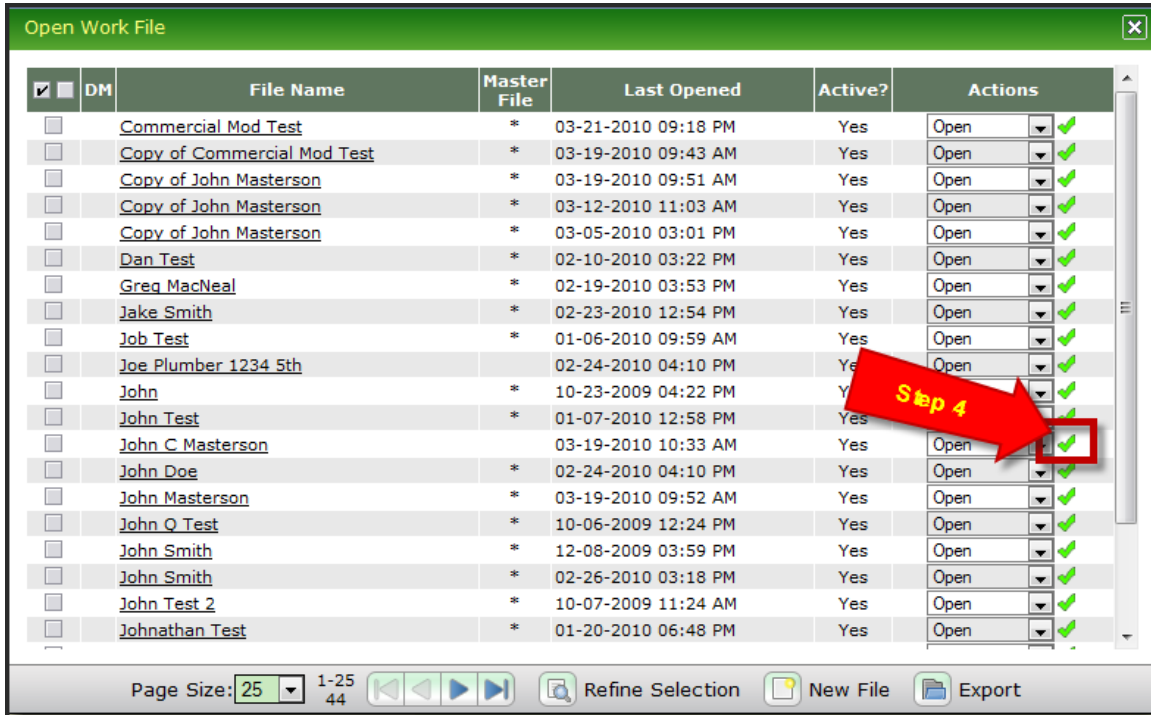


2. Click the home icon in the upper right corner of the screen
 - The Welcome! screen displays



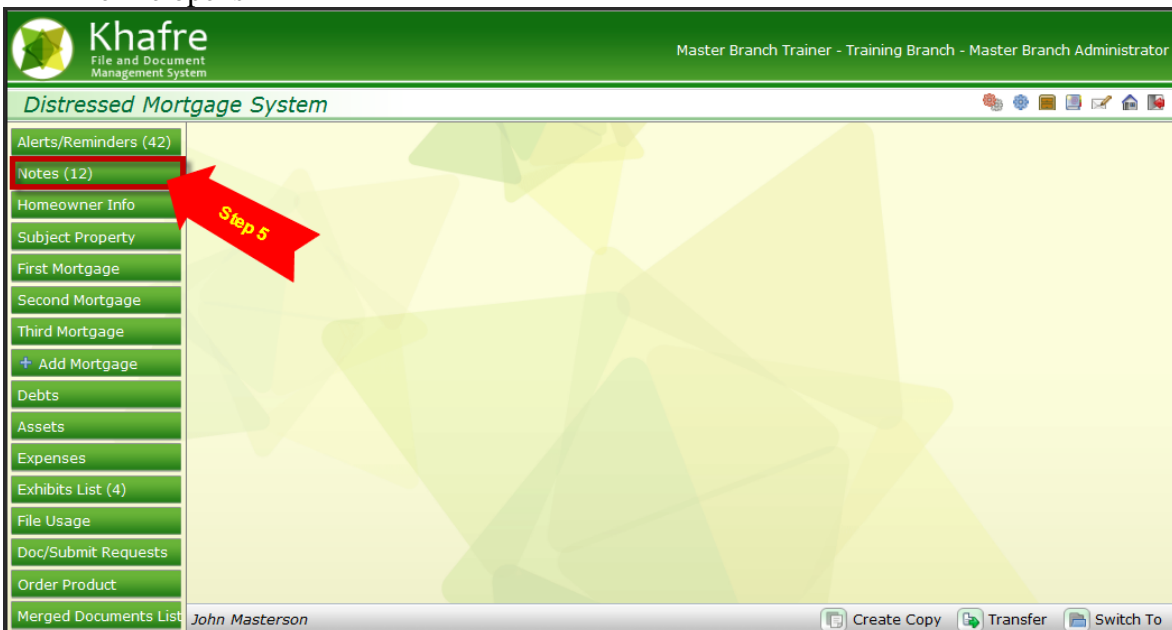
3. Click the Pipeline tab in the left-hand navigation menu

- The Open Work File dialog box displays



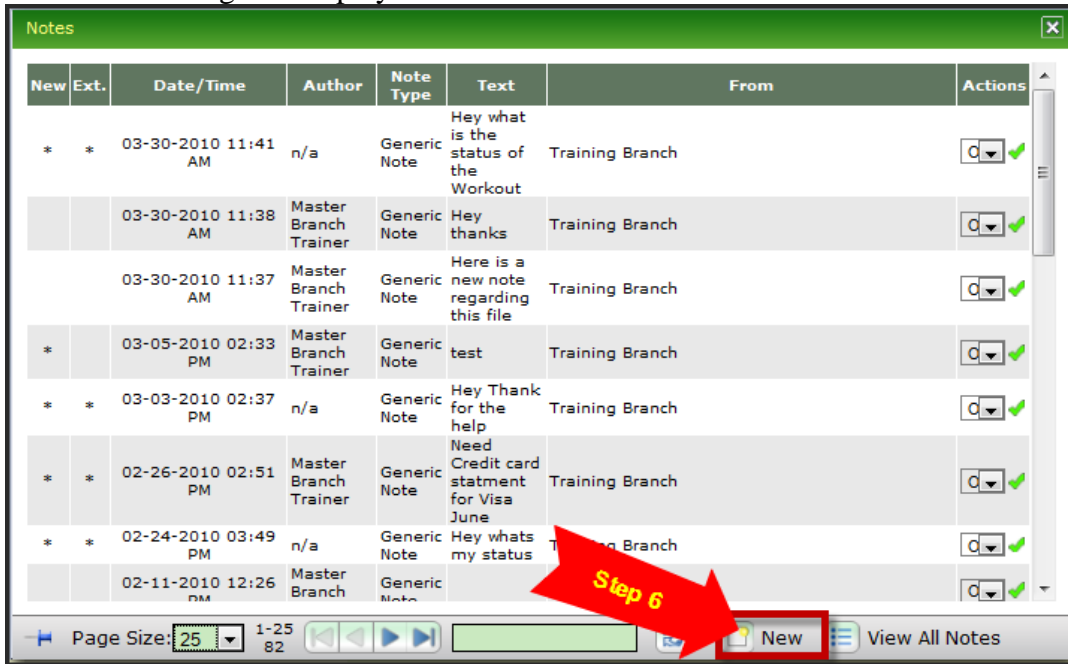
4. Click the green check to the right of the file you wish to open

- The file opens



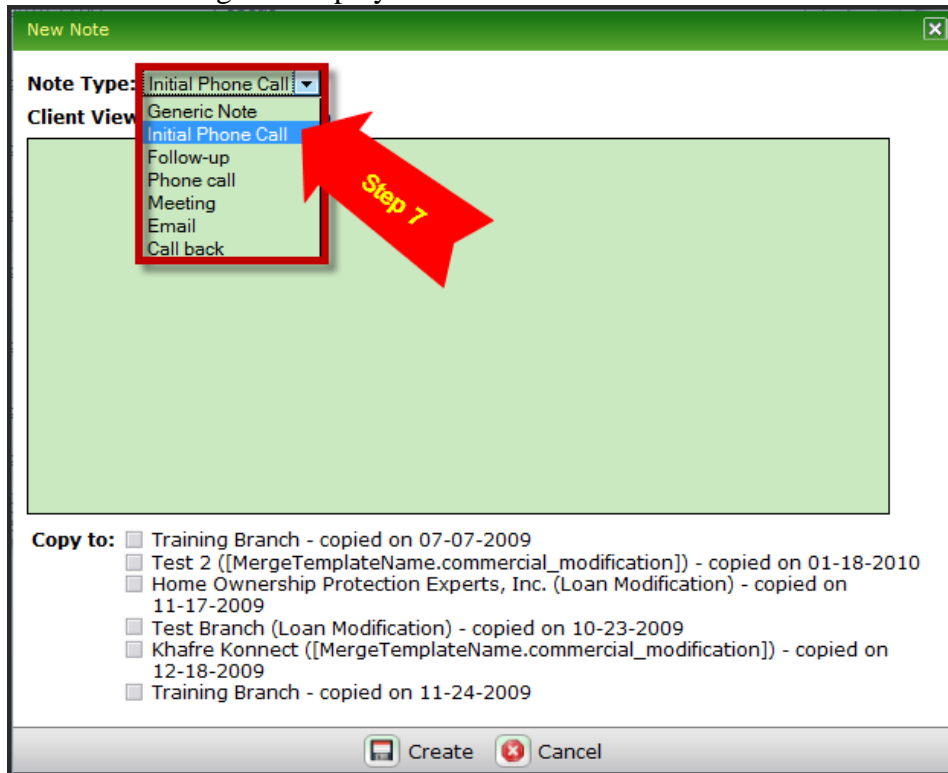
5. Click the Notes tab in the left hand navigation menu

- The Notes dialog box displays

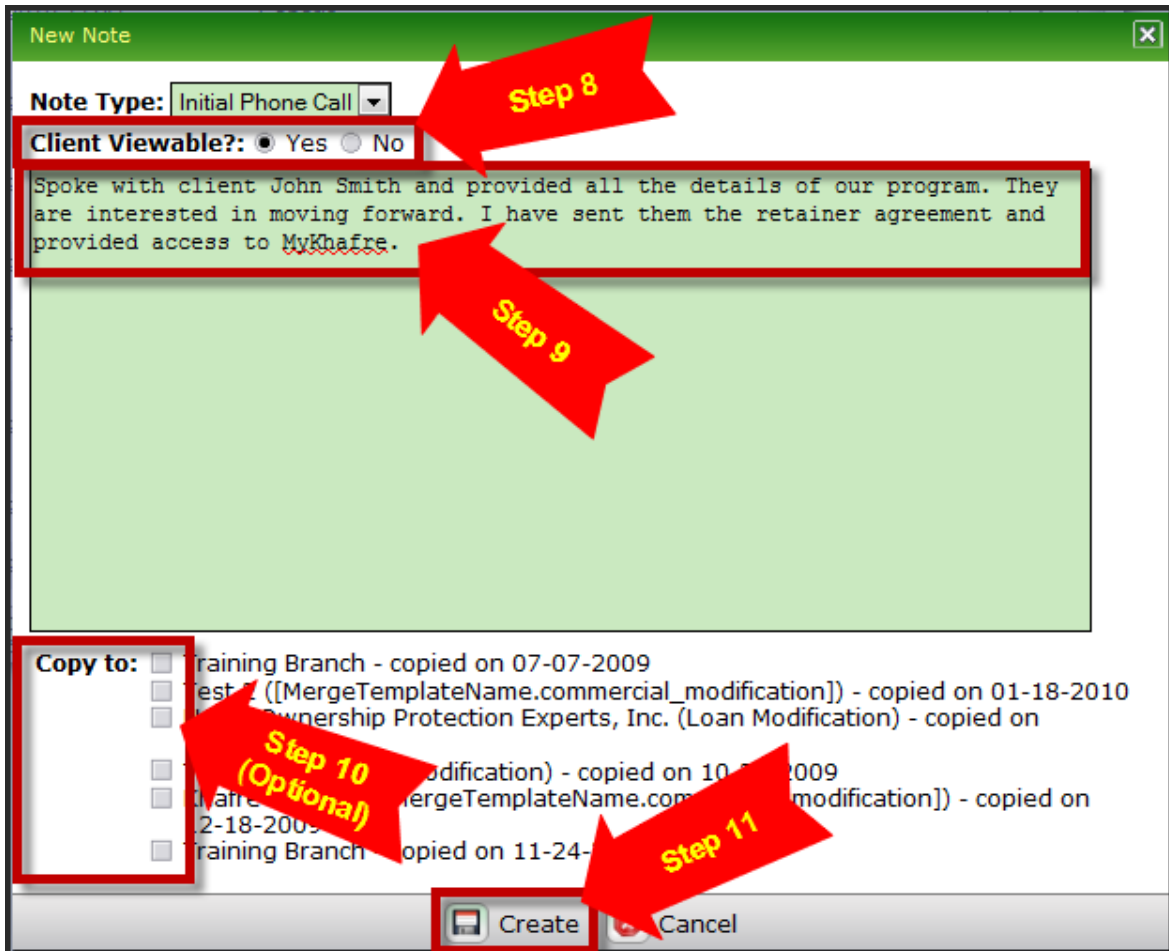


- Click the New button

- The New Note dialog box displays



- Select the type of note you are creating from the “Note Type:” pull-down list



New Note

Note Type: Initial Phone Call

Client Viewable?: Yes No

Spoke with client John Smith and provided all the details of our program. They are interested in moving forward. I have sent them the retainer agreement and provided access to MyKhafre.

Copy to:

- Training Branch - copied on 07-07-2009
- Test 1 ([MergeTemplateName.commercial_modification]) - copied on 01-18-2010
- Ownership Protection Experts, Inc. (Loan Modification) - copied on
- Modification) - copied on 10-7-2009
- MyKhafre ([MergeTemplateName.commercial_modification]) - copied on 12-18-2009
- Training Branch - copied on 11-24-

Create Cancel

8. Select whether the note should be visible to the client when they log into MyKhafre
9. Type your note
10. (Optional) If this is the Master file, mark which copies you want this note to be added to. If this is a copy file, mark whether you want the note to be added to the Master file by checking the appropriate boxes
11. Click the Create button