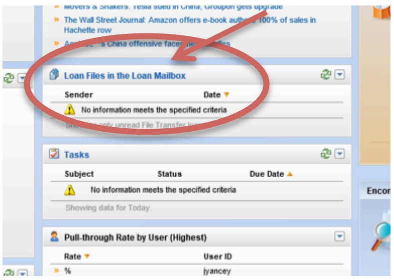
TUTORIAL: How to move A file to Prospects/iConnect

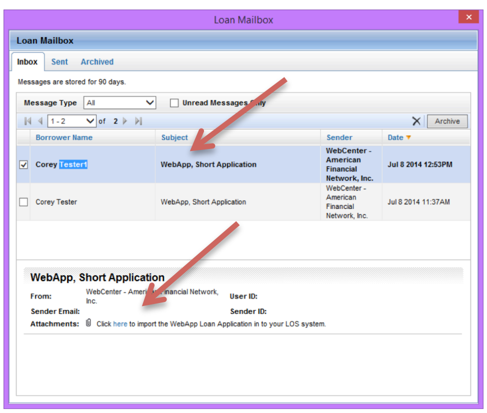
American Financial Network

When someone fills out the short or full application on your website, you will get an email alerting you that the file is in your loan mailbox. In order to move the file to prospects so that you can work on it and also sync it to our CRM, you will need to follow these steps.

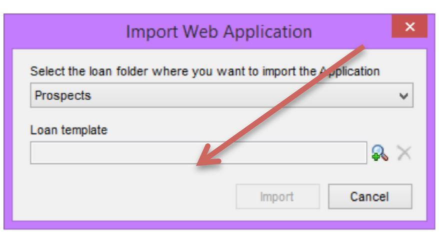
STEP 1
From the dashboard **CLICK TO OPEN THE "LOAN FILES IN THE LOAN MAILBOX".**
PLEASE NOTE: New mail does not always show until you open the mailbox.



STEP 2
CLICK ON THE EMAIL to see a menu appear below it. Then **CLICK ON THE LINK TO IMPORT**.



STEP 3
Select **PROSPECTS** on the first drop down.
CHOOSE A LOAN TEMPLATE. (You can always change it later) Then **CLICK IMPORT**.



You will now see the file in your prospects folder and it will appear in iConnect within a few minutes.

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