

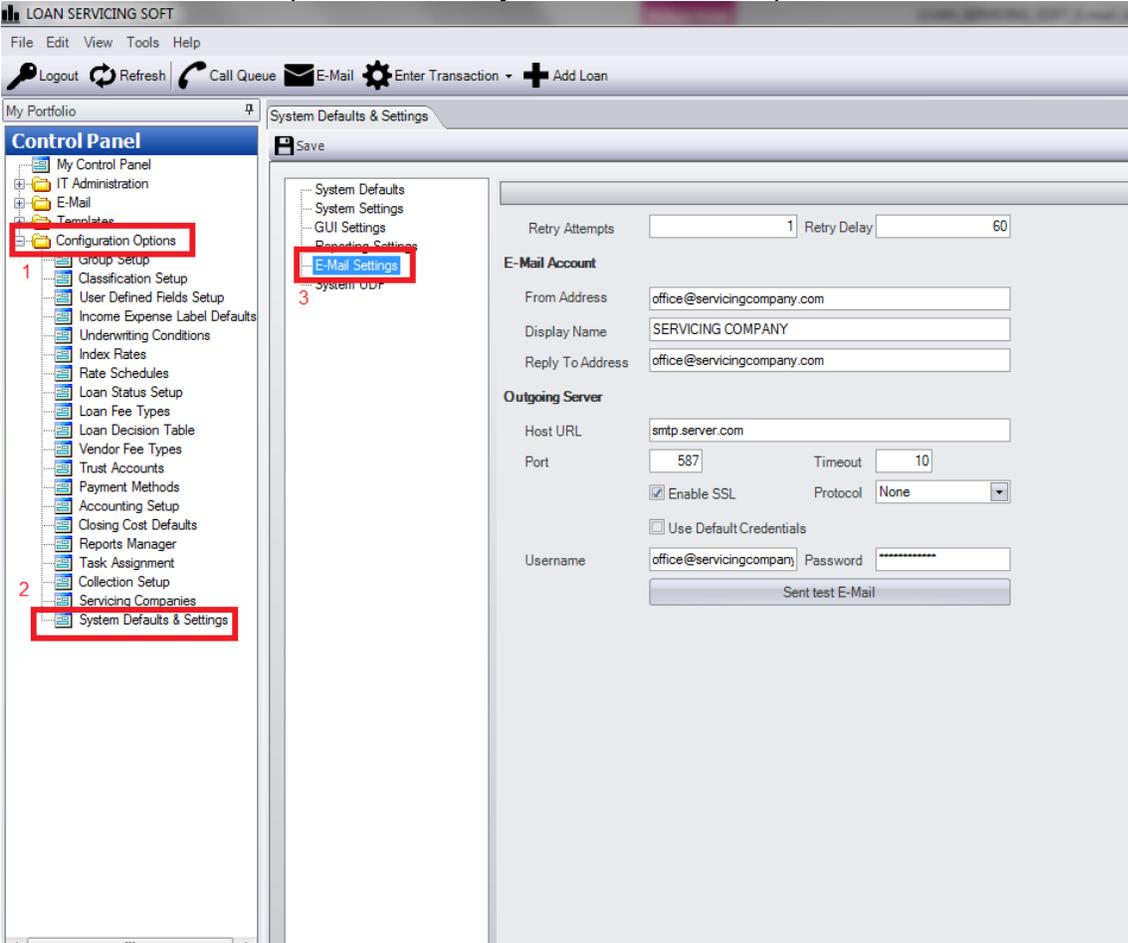
### LOAN SERVICING SOFT E-Mail Setup and Sending

This document will guide you through process of setting up & sending e-mail in LOAN SERVICING SOFT.

For additional information and/or questions please feel free to contact our support group at support@loanservicingsoft.com or 1-800-993-1839 x2.

### Setting Up E-Mail

To set up email functionality in the software, go to: Configuration Options > System Defaults & Settings > E-Mail Settings. Fill in all boxes with the appropriate information, as shown on the image below. For more information on where to obtain the "Outgoing Server" information, please contact your e-mail service provider.



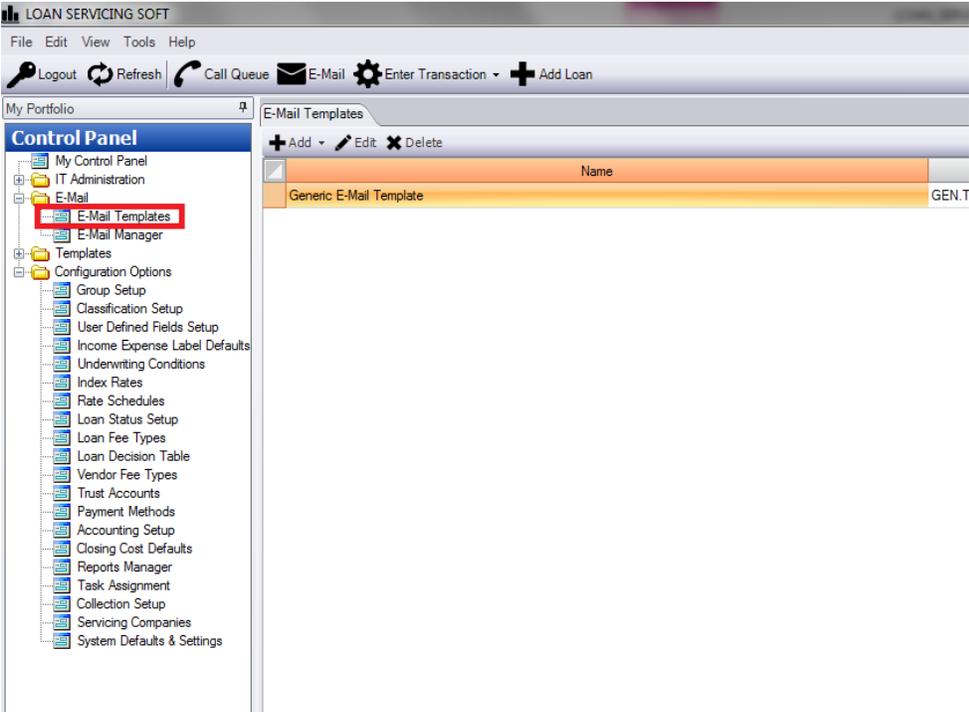
Finally, click on the "Send test E-Mail" button to determine whether the e-mail capabilities have been set up successfully. If the setup was successful, a "Message Sent" window will appear, and a test email should arrive in the appropriate email inbox.

If the "Message Sent" window did not appear, and/or an email did not arrive in the appropriate email inbox, please continue working with your e-mail service provider to re-enter the "Outgoing Server" information.

**E-Mail Templates Setup**

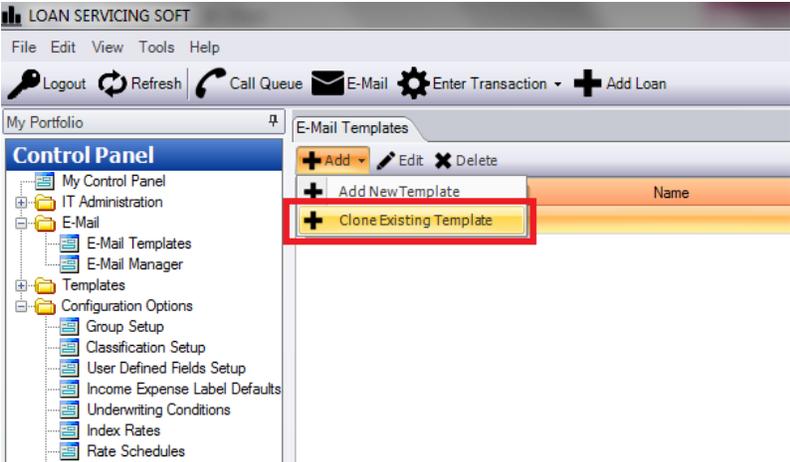
An unlimited number of e-mail templates may be set up in the software.

To set up an e-mail template, go to: Control Panel -> "E-Mail" folder -> E-Mail Templates.



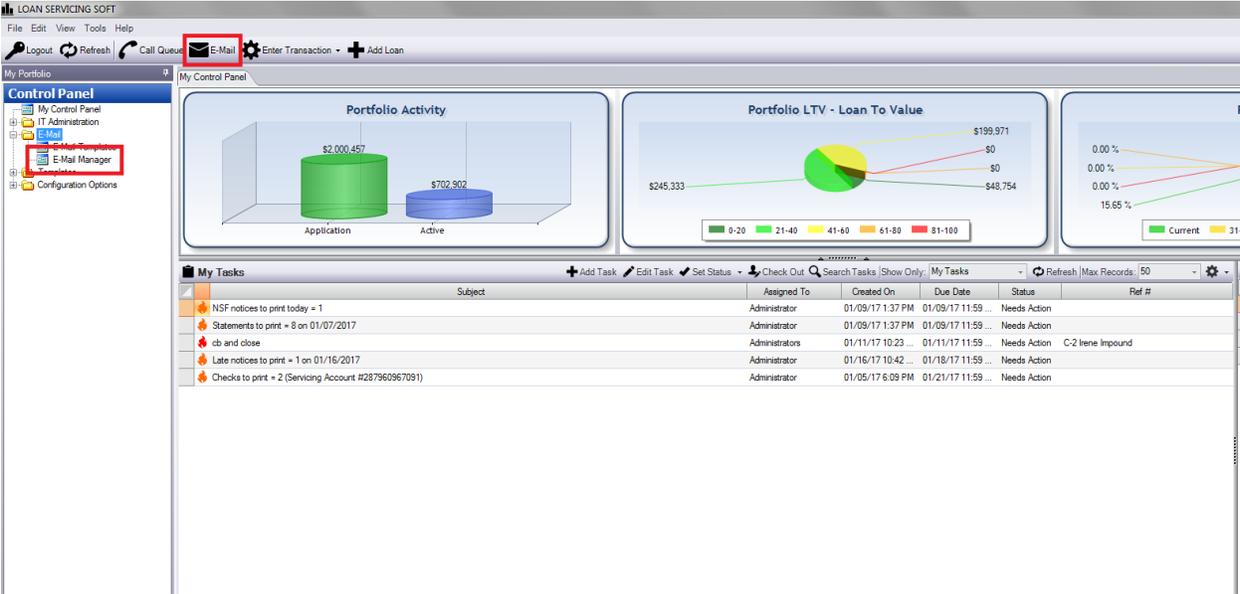
Click on the "Add" button to add a new template. There is also an option to clone an existing template when clicking the "Add" button (image below). It is recommended to

use the clone option as a shortcut to setting up emails with complex settings.

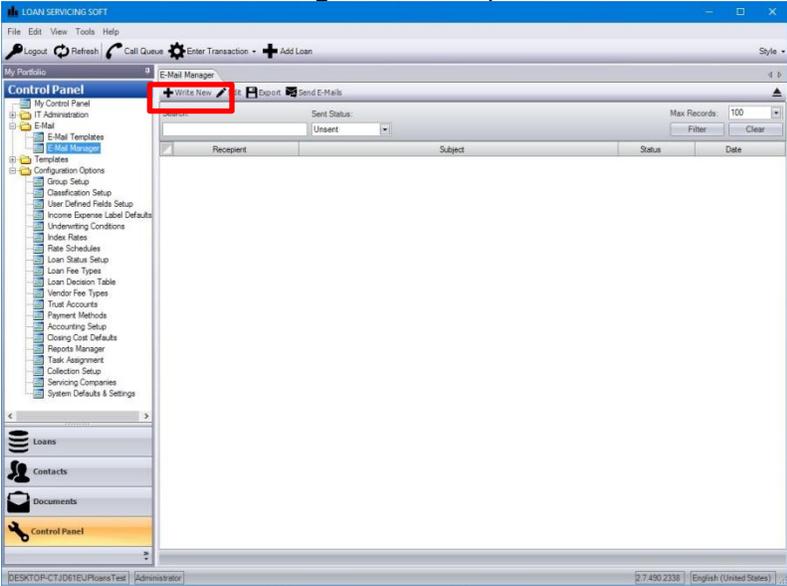


**Sending an E-Mail**

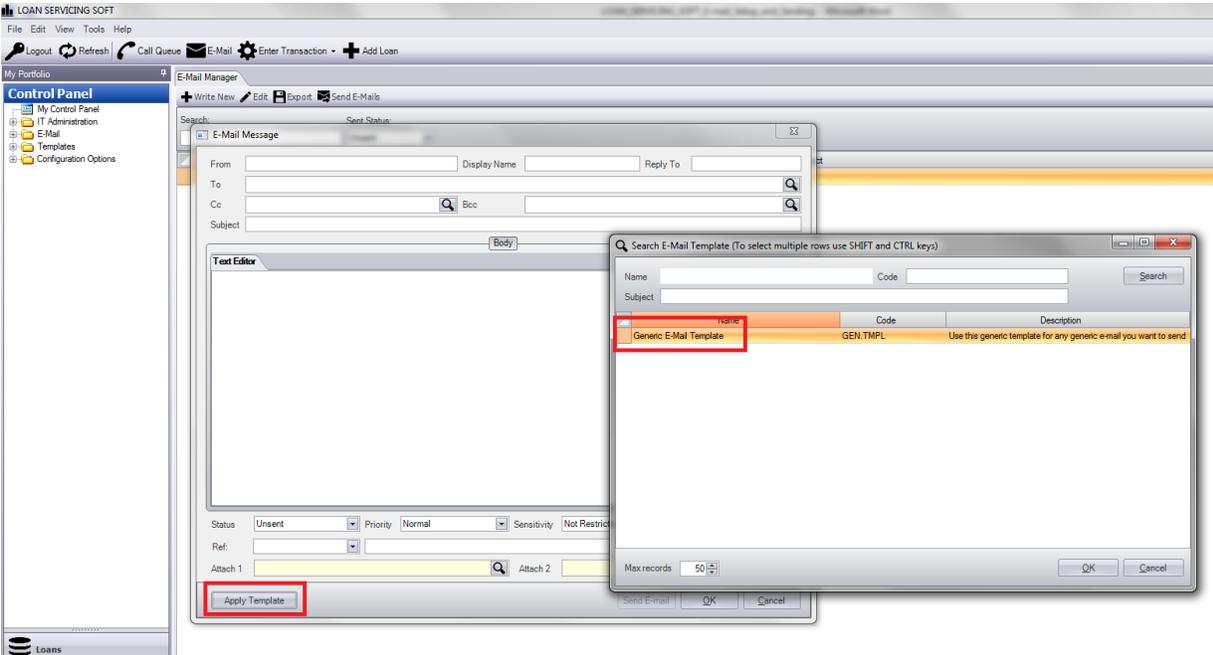
E-mails can be sent in one of two ways: 1) From the Control Panel, click on **E-Mail**, then select **E-Mail Manager**, or 2) click on the **E-Mail** icon from the top menu.



Once the E-Mail Manager screen opens, click on the **Write New** icon.



This will open a blank e-mail screen. From here, the user can manually enter the contents of the email, or the user can apply a template by clicking the **Apply Template** button.

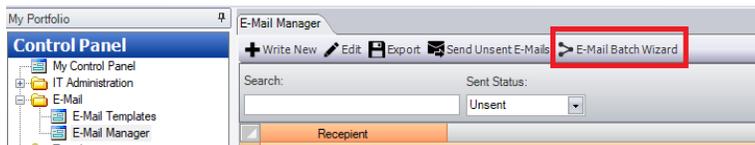


Once the user is ready to send the email, click on the **Send E-mail** button.

If, for any reason, the email was not sent by the software, the user can view all e-mails that were unsent by going to: Control Panel -> "E-Mail" folder -> E-Mail Manager. From here, the unsent e-mail can be re-sent.

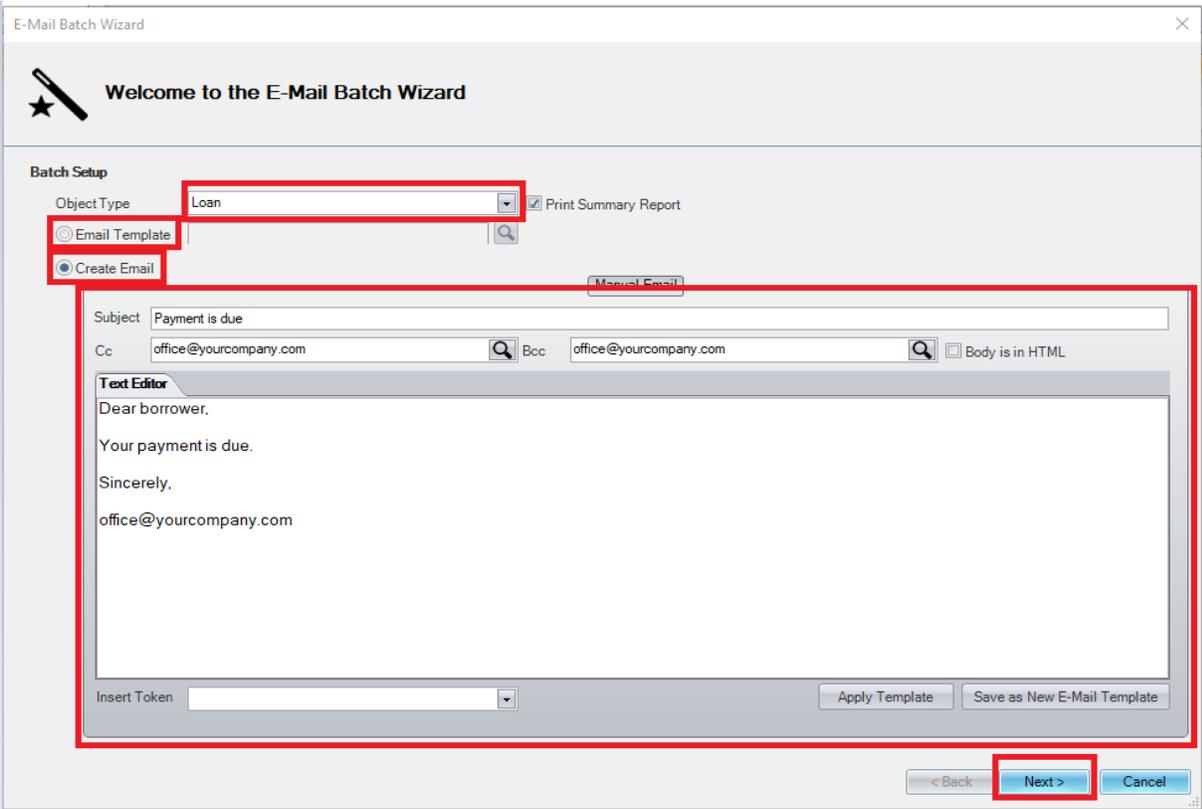
### **E-Mail Batch Wizard**

The E-Mail Batch Wizard process allows a user to send multiple emails at one time. To use this option, go to: Control Panel -> "E-Mail" folder -> E-Mail Manager, then click on the **E-Mail Batch Wizard** button.

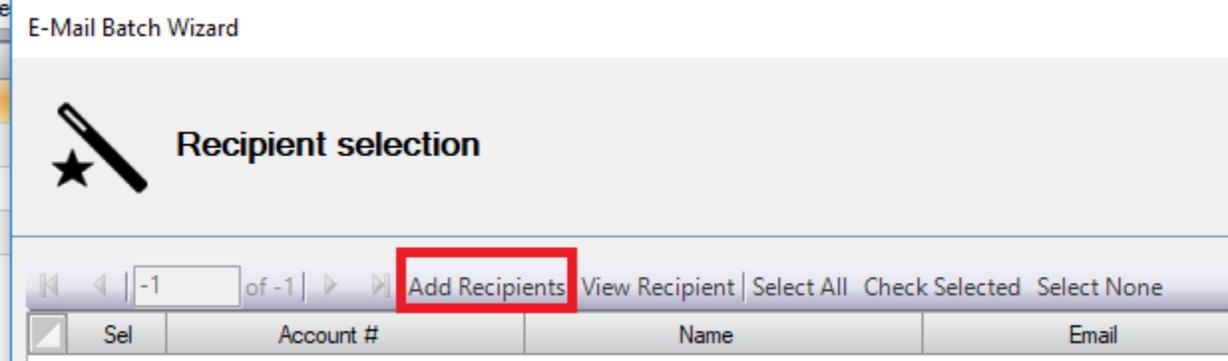


Under "Object Type," choose the contact that the email recipient will be under (for example, if an email is to be sent to a borrower for a specific loan, choose "Loan," or if an email is to be sent to a specific vendor, choose "Vendor.")

The user has the option of choosing an email template (if desired), or creating a new email, by clicking on the appropriate circle. Next, fill in the contents of the email, then click the "Next" button.



Next, click on "Add Recipients."



Choose all necessary recipients that should be receiving this email. Multiple recipients may be chosen by holding down the "Ctrl" button while clicking on multiple records. Once all recipients are chosen, click the "OK" button.

Search Loan (To select multiple rows use SHIFT and CTRL keys)

Loan #  Nickname   Loan Status Active   Special Status -

Borrower  Co-Borrower  Property Address

Loan #	Nickname	Borrower	Co-Borrower	Property Address	Payment	st	Status Date
12345678		Borrower of Loan			562.76	C..	3/20/2018
24680123		Sammy Sosa				C..	7/27/2018
L10000001		Barry Bonds		1234 Barry Bonds Drive, San Francisco, C...	504.93	A..	
L10000002		Barry Bonds		1234 Barry Bonds Drive, San Francisco, C...	504.93	A..	

Next, check all the boxes next to all desired recipients on the left, or click on the "Select All" button to select all recipients, then click the "Next" button.

 **Recipient selection**

1 of 3 | Add Recipients View Recipient **Select All** Check S

Sel	Account #	Name
<input type="checkbox"/>	12345678	Borrower of Loan
<input type="checkbox"/>	24680123	Sammy Sosa
<input type="checkbox"/>	L10000001	Barry Bonds

Finally, click the "Finish" button.