

Roostify

https://roostify-dev-pr-8132.herokuapp.com/la/1788437060842557/home_tasks_list

ROOSTIFY

Welcome, Admin U

Admin U
Loan Officer
NMLS #123456789
roostify... Mobile
111-111-...

Loan Applications

Connections

Team

Unassigned Apps

Home Loan 1

Activity

Tasks

Documents

Loan Details

Admin Console

Configuration

Settings

Reporting of other income Jan 05

Personal tax returns - most recent year Jan 05

Personal tax returns - most recent year Jan 05

Personal tax returns - previous year Jan 05

Personal tax returns - previous year Jan 05

Primary mortgage statement - most recent month Jan 05

Due Today Due

Copy of your driver's license or equivalent proof of identity (e.g., passport) Jan 07

Copy of your driver's license or equivalent proof of identity (e.g., passport) Jan 07

Other separation related expenses Jan 07

Separation or divorce decree, or similar legal document for alimony payments Jan 07

Upcoming Due

Upcoming tasks will appear here.

Completed Done

Please eSign the Initial Disclosure for TOM T Jan 04

Document for task 6598433915504082_2019-01-04 12:30:48.311

Please eSign the Initial Disclosure for TODD PETER Jan 04

Document for task 8538204787024052_2019-01-04 12:30:41.303

G fine for me

- 1) Login to Application as Admin
- 2) Click on Configurations drop down
- 3) Select States Tab
- 4) Click '+' icon at right corner to Create a New State Configuration
- 5) Enter the name of New State Configuration
- 6) Select the name of account from drop down to which configuration is to be set
- 7) Click Create button
- 8) Uncheck the 'Allow this configuration to be used by child accounts' check box
- 9) Click Save button
- 10) Check and uncheck the States as per requirements
- 11) Scroll Down and click Save button present at bottom
- 12) Select accounts tab in Admin console
- 13) Select child account of the account for which new State configuration is created.
- 14) Click Configuration tab.

15) Go to State configuration drop down.

16) Check whether Newly Created State configuration name is displayed in drop down.

The screenshot displays the Roostify web application interface. The browser address bar shows the URL: https://roostify-dev-pr-8132.herokuapp.com/la/1788437060842557/home_tasks_list. The page header includes the Roostify logo and a welcome message: "Welcome, Todd Pater".

The left sidebar contains navigation links: "My Transactions", "Home Loan 1", "Activity", "Tasks" (highlighted), "Documents", "Loan Details", and "Settings".

The main content area displays a list of tasks under the heading "ent, interest on investments, dividends)". The tasks are organized into sections: "Due Today", "Upcoming", and "Completed".

Task	Due
Reporting of other income	Jan 05
Reporting of other income	Jan 05
Personal tax returns - most recent year	Jan 05
Personal tax returns - most recent year	Jan 05
Personal tax returns - previous year	Jan 05
Personal tax returns - previous year	Jan 05
Primary mortgage statement - most recent month	Jan 05

Due Today

Task	Due
Copy of your driver's license or equivalent proof of identity (e.g., passport)	Jan 07
Copy of your driver's license or equivalent proof of identity (e.g., passport)	Jan 07
Other separation related expenses	Jan 07
Separation or divorce decree, or similar legal document for alimony payments	Jan 07

Upcoming

Upcoming tasks will appear here.

Completed

Task	Done
Please eSign the Initial Disclosure for TODD PETER	Jan 04
Document for task 8538204787024052_2019-01-04 12:30:41.303	

The right sidebar shows the user profile for "Admin U", a Loan Officer with NMLS #123456789, and a mobile number. Below the profile, there is a message input field and a "Send a message to your loan team:" button. A privacy notice is also visible at the bottom of the sidebar.