Form Translation

Meeting on 07/08

Date: Should be populated Automatically

- Lead No:
- Customer No:
- Sales Manager:
- Total Customers:
- Master Customer No:
- Floor Sale, Fax, Mail out:

SUMMARY WORKSHEET (A)

1. BASIC INFORMATION
   - Purchaser, Borrower, titleholder, Auth Rep/Signatory multiple choice
   - Languge (Single choice)
2. ☑ OPTION for a co-signer
3. title taken as: (multiple option? or just one?)
4. Name of Entity: (?) Legal Rep / trust
5. Beneficial Interests: (can it be more than one?)
6. List Purchase Price: (?)
7. Existing Owner: (this could be moved to section 1)
8. Purchase Incentive: (Pre-filled by Sales Rep)
9. Note / Special Instructions: (for Sales Rep)
10. Admin Notes: (Def. Hide this only Available to Sales Rep)
11. Basic Information: (Again?)
12. Full information: (this should be merged into one section)

13. Discrepancy Explanantions: (Hide/open if necessary)

14. full Information of Co-Signer: (Not neccessary unless co-signed)

15. Additional Information for Entity: (?)

16. Disclaimer & Signature: (Date shouldn't be there)

B. ID VERIFICATION FOR 25% OR MORE BENEFICIAL OWNER. → ? what does it mean?

1. Information of Beneficial Owner: (is this a different person?)
2.
3.

4. Signatures & Disclaimer: (Date Automatic)

C. CREDICARD AUTHORIZATION FOR DOWNPAYMENT

- DATE (Auto)
- AMOUNT $
- CARD TYPE (should populate by itself)
- CC ACCOUNT (ACCOUNT? OR Number?
- exp. DATE ✓
- Billing Address ✓
- Phone Number: AGAIN? (should be in BASIC INFO)
- Signature
- Name

> could be merge

1 LOAN APPLICATION

- BORROWER information
  - BASIC INFORMATION IS REPETED (Maybe we could Add A button on the first section to know if they Are Gonna be Requesting A loan. TO Activate this Section).
- EMPLOYER INFO
- Nearest relative: (why?)
- Disclaimer & Signature:

CREATE ACCOUNT Online?

- Live chat?
- Tabs within tabs
- Dropdowns
- Req. (just mark the optional)
- Icons

- Collapsing fields (Accordion) / with Fields)

- Fast Pass -? Print it out option

- Can't change form

Docusign.

- TOUR
- CONTACT
- Purchase
- LOAN
- Payment
- SUMMARY.

Purchase TAB.

Type:
- Title taken as:

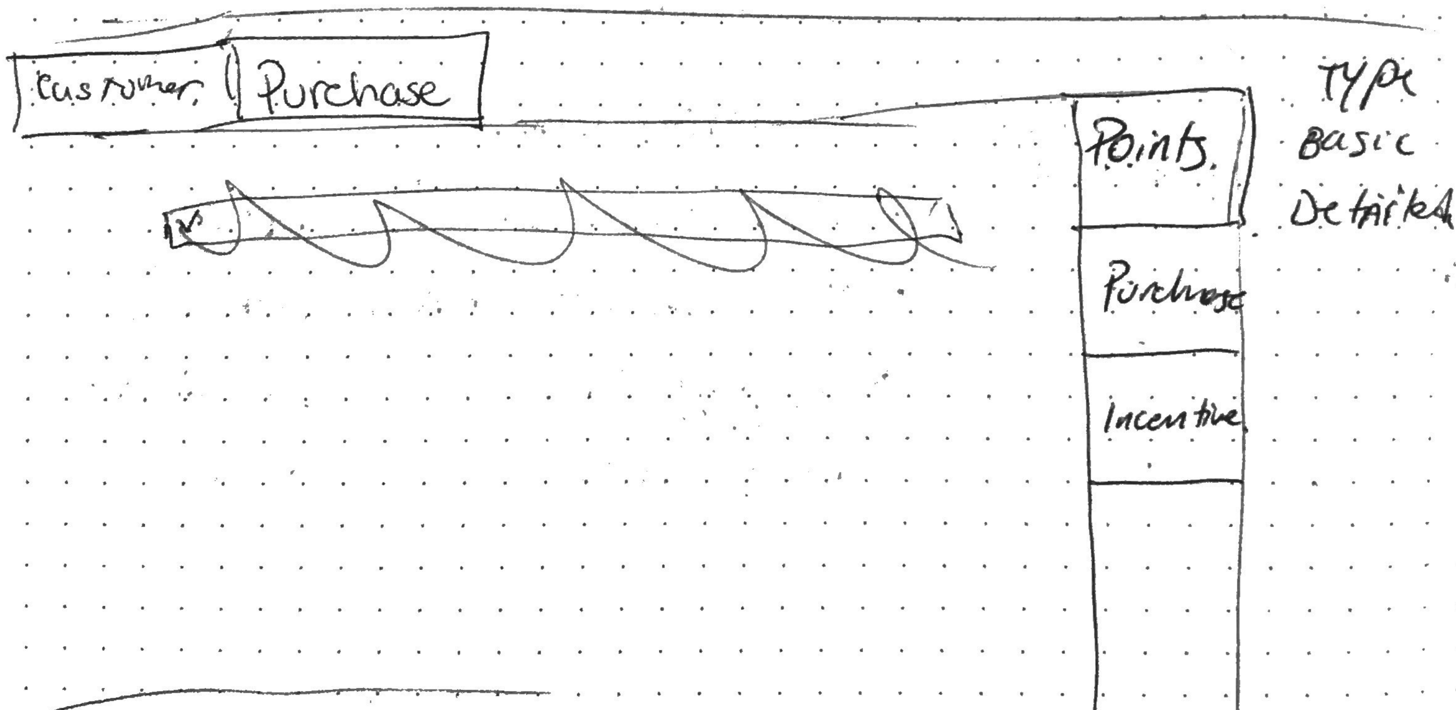
BASIC:
- Full legal name
- Customer #

Detailed:
- List Purchase
- Net Contract
- Downpayment
- Additional payment?
- Balance Due

BASIC:
- Title
- Full Name
- Customer #

Detailed:
- List Purchase
- Net Contuct
- Payment
- Add payment
- Balance Due

Additional:
- Balance due days.
- Anticipated closing dates

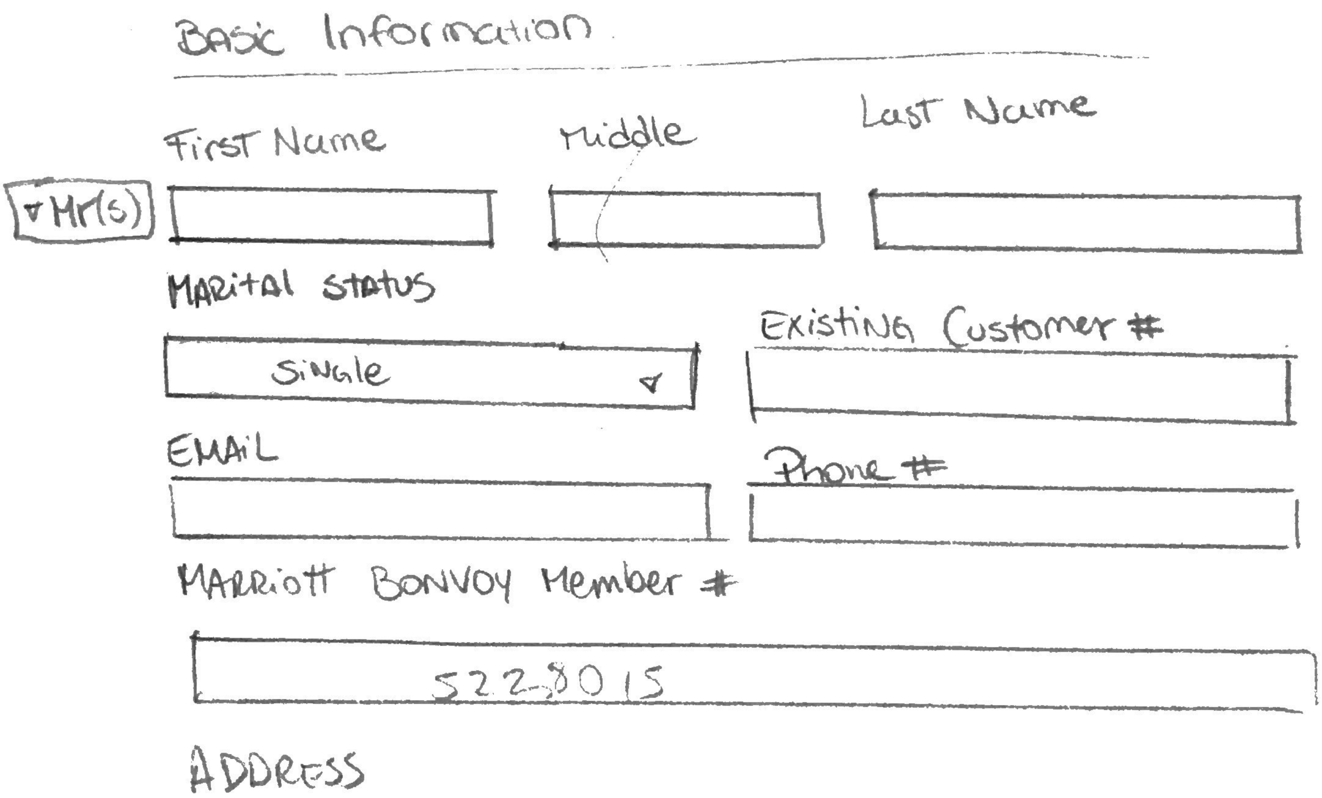


Genericꞩ tabs.

Form Design & Interaction

* Live chat for support.
* Tabs within tabs?
* Dropdowns
* Required
* Human element
* Icon selections

Customer #1



→ fast pass optional
First tab

Deadlines
- Wireframes:
- UI:

Customer
~~Owner~~ | Information

type
Please mark all options that apply.

Purchaser | Borrower | Title Holder | Auth. Rep

check boxes

Please choose one preferred language.

ENGLISH ▼ → Dropdown

Choose. RADIO BUTTON.

Basic Information

Title
Mr. ▼

Last Name

Suffix

Middle Name

First Name

DOB

Marital Status

Add A YES or ENroll.

Marriott Bonvoy #

ENROLL

☐ M ☐ U ☐ S

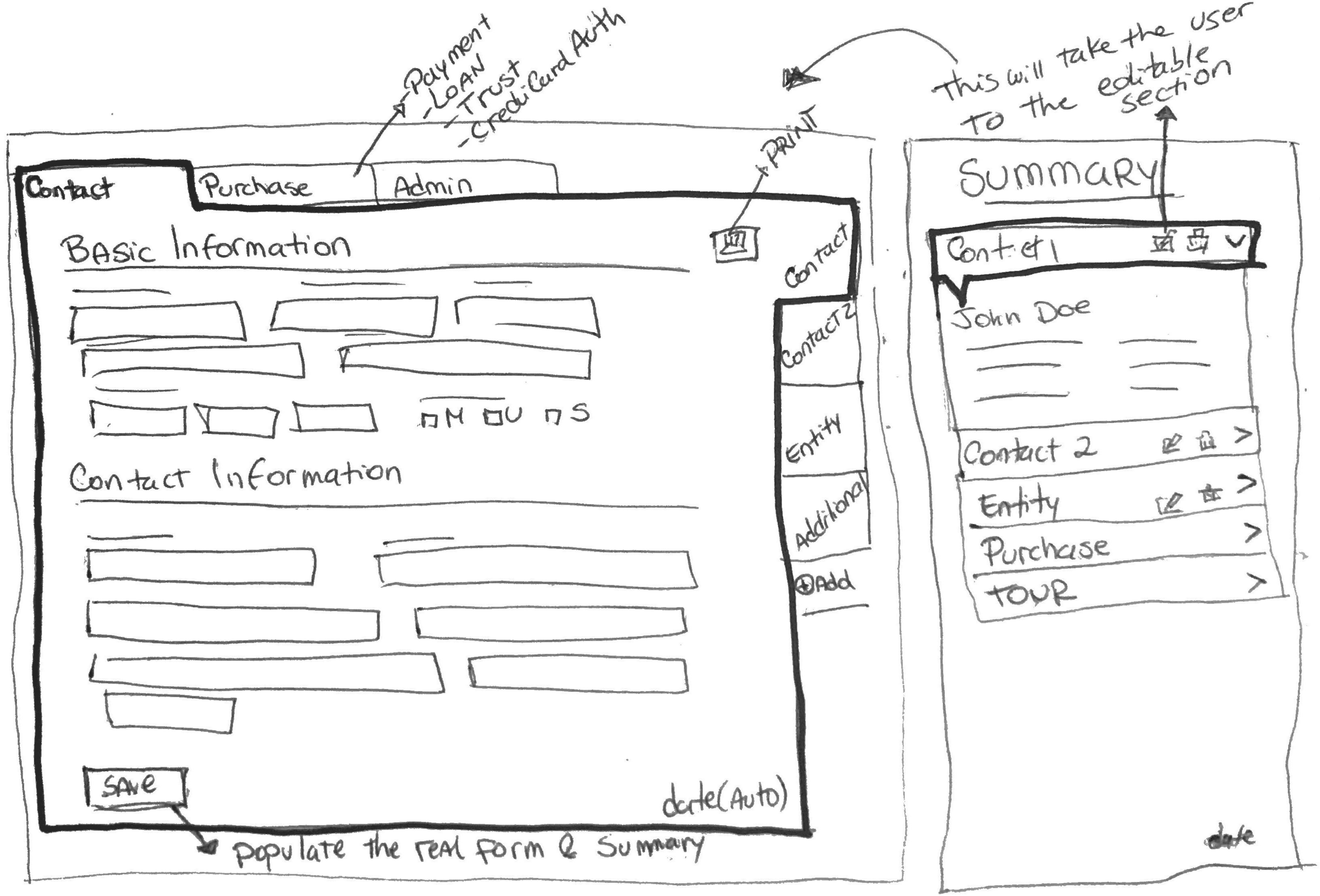
When collapsin, show fields in a "NON-EDitable" way.

MARRIOTT BONVOY #

☑ YES

☐ ENroll

Triggers



Payment
-LOAN
-Trust
-CrediCard Auth
PRINT
This will take the user to the editable section
Contact
Purchase
Admin
Basic Information
M
U
S
Contact Information
Contact
Contact2
Entity
Additional
Add
SAVE
date(Auto)
populate the real form & Summary
Summary
Contact 1
John Doe
Contact 2
Entity
Purchase
TOUR
date