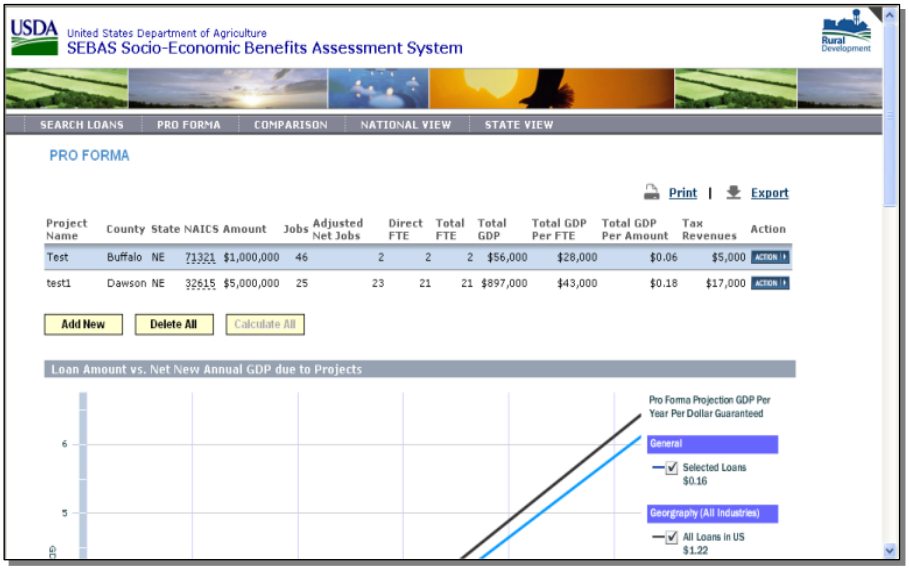
The **Pro Forma** search option is used to make a determination of which loan application would be best for a specific need. When the **Pro Forma** function is run, a projection of which loan application will generate the most economic activity is displayed.

PRO FORMA

The **Pro Forma** page appears.



Pro Formas previously run are shown in the list at the top of the screen. They are identified by the assigned project name. The system will save the previous entries, unless deleted by the user.

1. Remove the **Pro Formas** that are no longer needed.

2. To run a new **Pro Forma**, click the **Add New** button. This will add a new search to the list of projects.
   Add New
   The **Pro Forma** data entry page appears.

3. To begin your search, enter the **Project Name**, **Amount**, and **Jobs**.
   Note: Asterisks note the required information

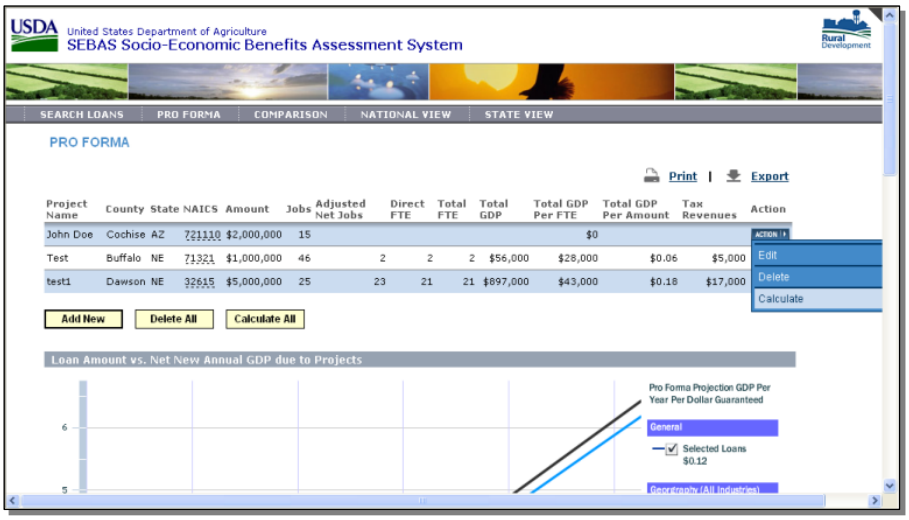
4. Next, enter the State and County of the proposed project

5. To select the **NAICS Code**, click the arrow.
   A search can then be done by entering the **NAICS Code** or a desired search term, such as “Hotels.”

6. Once the desired search criteria has been entered, click the **Save** button.
   Selecting Save will transfer you to the **SEBAS Data Output** screen. Save
   You will then return to the Pro Forma page. Your new search will now be included in the project list.

7. To calculate the predicted loan performance measures click on the **Action** button.

8. Select the **Calculate** link.
   Note: This is also the location where you can choose to Delete a Project from your list or Edit an existing Project.



A pop-up box will appear asking you if you would like to proceed with the calculation.

9. Click the O.K. button
   The estimated results of the potential application are then displayed.