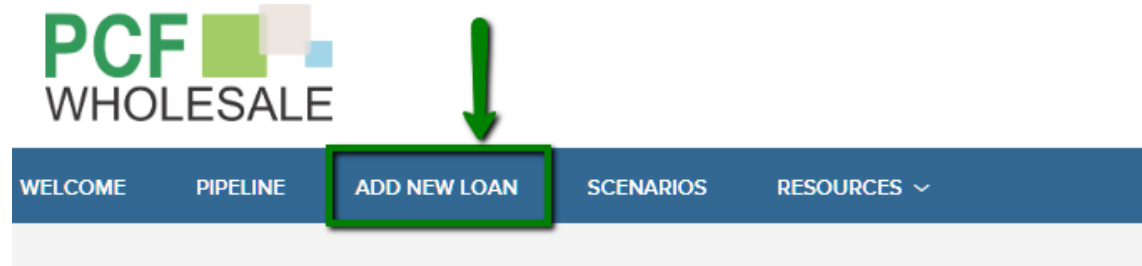


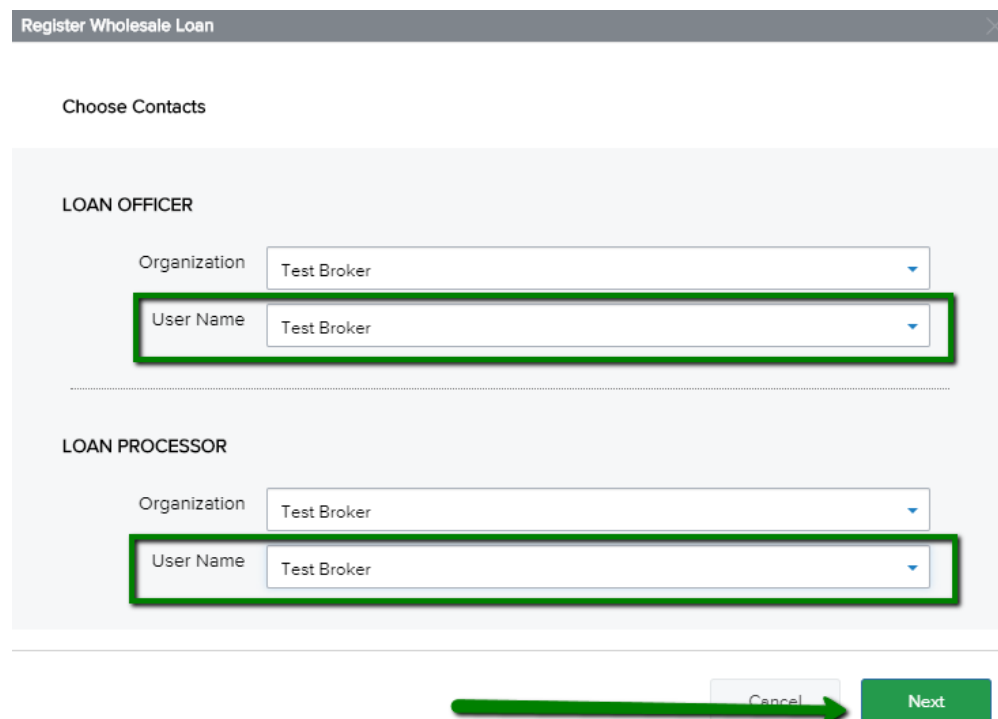
## How to Start and Submit a loan | Cheat Sheet

Once you have Logged in

Click on “Add New Loan”



You will need to select the Loan Officer and the Loan processor.



The image shows a form titled "Register Wholesale Loan" with a close button (X) in the top right corner. The form is divided into two sections: "LOAN OFFICER" and "LOAN PROCESSOR". Each section has two dropdown menus: "Organization" and "User Name". Both dropdown menus in both sections are set to "Test Broker" and are highlighted with a green box. At the bottom of the form, there are two buttons: "Cancel" (disabled) and "Next" (active). A green arrow points from the "Next" button towards the right.

On this next step you can select to enter the information to the loan Manually or upload a FNM file.

To upload you can drag and drop from your desktop to the window or Browse for the file from the green "Click here to browse" button

Please specify if you what it to be Broker disclosed LE

Or Lender Disclosed LE

**Register Wholesale Loan**

**Initial Loan Estimate Issued By**

Broker

Lender

Import Loan Data From FNM 3.2

Manual

Drop Here to Upload or [Click to Browse](#)

Back Cancel Next

Once you have reviewed the file you will want to register the loan so it receives a loan number and you save the file in the pipeline.

WELCOME PIPELINE ADD NEW LOAN SCENARIOS RESOURCES

Loan Number: Total Loan Amt. Loan Type: Loan Purpose: Rate: LTV/CLTV:

LOAN SUMMARY

1003

Loan Information

Borrower Information

Select Borrower Pair

(1) Mark & Rain Edit

Register Next

It will provide the information like shown below

Loan Number: <b>190813284</b>	Loan Type: <b>VA</b>	Rate: <b>3.250%</b>	Wh	1st	🔒	✉	👤	Started
Total Loan Amt: <b>\$308,867.00</b>	Loan Purpose: <b>Cash-Out Refinance</b>	LTV/CLTV: <b>92.00% / 92.00%</b>						

[Save](#) [Next](#)

If you want to notify our team that you are ready for us to start working on the loan.

You will need to submit the loan but before it gets submitted the system requires the submission Package. (anything you want to add as part of the loan can be added at this point or it could be added any time throughout the loan by uploading it to “Unassigned”).

The screenshot shows a sidebar menu with 'DOCUMENTS' highlighted. The main content area displays a table of documents for 'All Borrowers'. The table has columns for document name, status, comments, and actions. A green arrow points from the 'DOCUMENTS' menu item to the 'SUBMISSION PKG' row.

All Borrowers			
[UNASSIGNED]		Drag & Drop files here or	<a href="#">Browse for files</a>
Mark Tieman, Rainy Tieman			
* CD		Comments	Drag & Drop files here or <a href="#">Browse for files</a>
* LE		Comments	Drag & Drop files here or <a href="#">Browse for files</a>
* SUBMISSION PKG (ALL ITEMS ON SUBMISSION FORM CHECKLIST)		Comments	Drag & Drop files here or <a href="#">Browse for files</a>
COMPLIANCE		Comments	Drag & Drop files here or <a href="#">Browse for files</a>

You can now Click on Submit loan

The screenshot shows the sidebar menu with 'LOAN ACTIONS' expanded. The 'Submit Loan' button is highlighted with a green box.

- LOAN SUMMARY
- 1003
- PRODUCT PRICING & LOCK
- DOCUMENTS
- CONDITIONS
- FEEs
- DISCLOSURE TRACKING
- LOAN ACTIONS
  - Import Additional Data
  - Order Credit
  - Submit Loan**
  - Re-Submit Loan

If you are missing the submission Pkg or basic information to start the loan you will be asked to enter it or upload it with a red pop-up like the one below.

Missing required fields and documents

Documents Missing Attachments

Document \* Submission Pkg (All items on Submission Form Checklist) is missing an attachment

Required Documents

\* SUBMISSION PKG (ALL ITEMS ON SUBMISSION FORM CHECKLIST)

Comments

Drag & Drop files here or

Browse for files

Browse for files

Review Loan Update

If you do get this, once you have added what is needed Click update for the system to review.

Required Documents

\* SUBMISSION PKG (ALL ITEMS ON SUBMISSION FORM CHECKLIST)

Comments

Drag & Drop files here or

Browse for files

Sub pkg.pdf 1,573 08/23/2019 8:49 AM Broker, Test

Review Loan Update

It will ask you to confirm if you want to submit the loan.

Are you sure you want to submit this loan at this time?

Cancel Continue