

Loan Transfer made by the LO and LP

Once you have logged in and selected the loan you want to transfer:

In the upper right corner of the screen when the loan is open, you will see the milestone settings at which the loan is in. To the left of this is what appears to be a person icon. If you click on this icon, a popup window opens where you can change ownership on the loan of the Loan Officer and the Loan Processor.

This change can be done By the LO LP or Admin of the account.

The screenshot displays the PCF Wholesale loan management interface. A 'Key Loan Contacts' popup window is open, showing contact information for the Loan Officer and Loan Processor. Green arrows point to edit icons for each contact. The background shows the loan summary for a \$585,000.00 loan.

PCF WHOLESALE

WELCOME PIPELINE ADD NEW LOAN SCENARIOS RESCUE

Test Test
CA, Test Broker

LOAN SUMMARY

1003

PRODUCT PRICING & LOCK

DOCUMENTS

\$585,000.00

0.00% / 0.00%

Base Loan Amount
\$585,000.00

Key Loan Contacts

Originator Contacts

Loan Officer

Test Broker
Test Broker
testbroker@primechoicefunding.com
Cell
Office 714-555-1212
Fax

Loan Processor

Test Broker
Test Broker
testbroker@primechoicefunding.com
Cell
Office 714-555-1212
Fax

Lender Contacts

Account Executive

test Super admin
Admin@primechoicefunding.com
Cell null

Loan Processor

Zachary Johnson
zacharyj@primechoicefunding.com
Cell

CONTACT US Test Broker

0.000%
0.00% / 0.00%

Wh Test Started

Application Disclosure

Registered 06/27/2019

Sent

Loan Officer

Test Broker

Join PCF

Test Broker

Test Broker

testbroker@primechoicefunding.com

Cell

Office 714-555-1212

Fax

Cancel

Save

