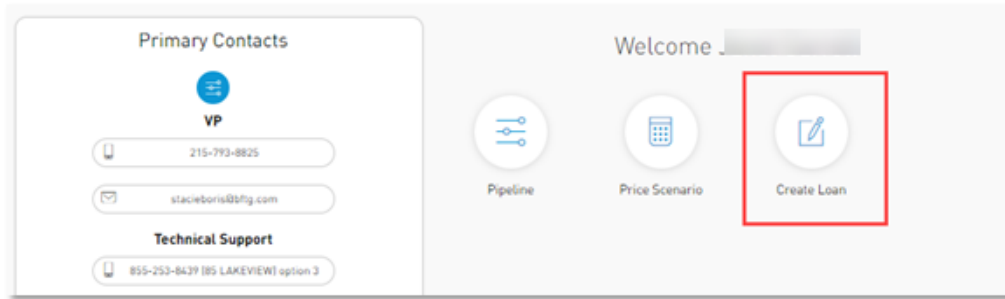


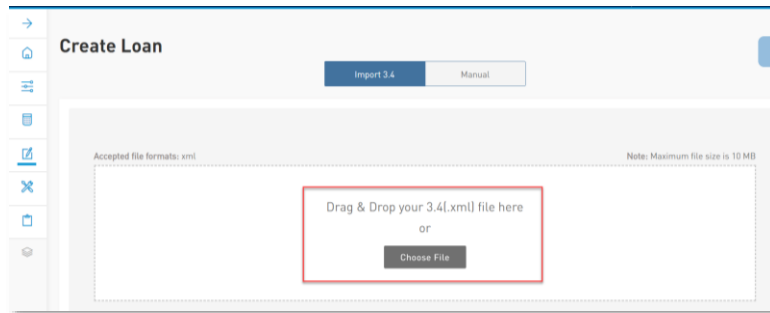
Create a loan application by manually entering the URLA/1003 data or importing a 3.4.xml file. Importing the 3.4.xml file allows for quick loan creation. Follow the steps below to upload the loan file.

**Note:** Internal and external users can create loans. Internal users can generate the loan on behalf of a Loan Officer from a branch associated with a broker company.

1. Log in to the [Lakeview Correspondent Non-Delegated Portal](#).
2. Click the **Create Loan** icon from the **Home** screen.

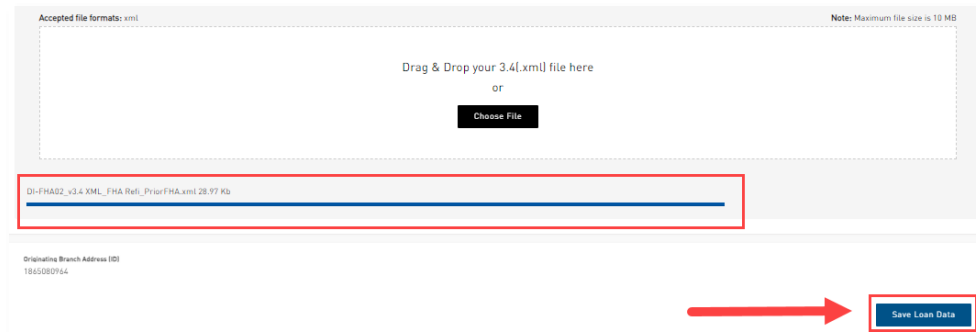


3. Drag and drop the 3.4 loan file into the window or click **Choose File** to browse for a file to select.



**Note:** The upload progress bar displays the progress, upload speed, percentage complete, and total file size of the document.

4. Click **Save Loan Data**.



**Outcome:**The **Create Loan** screen prompts for a date.

6. Click the **Calendar** icon.
7. Select the appropriate date.
8. Click **Next**.

**Outcome:**The loan is successfully uploaded. The **Loan Summary** screen appears.

9. Enter a **FICO** score on the **Loan Summary** screen below the **Borrower and Employment Information** section.

Loan Summary

Application Date 05/13/2022	ITP Received Date -	Est. Closing Date -
Approval Date -	DTI/DSCR 12.52 / 15.85	Loan Status Loan Created
Product -	Base LTV / CLTV 88.24% / 88.24%	

Borrower And Employment Information | DOMENIC TESTLOAN

Borrower

First Name DOMENIC	Last Name TESTLOAN	<a href="#">Add Co-Borrower</a>
SSN XXX-XX-5143	Email ken.c@fanniemae.com	
Cell Phone (818) 444-1234	FICO	

Present Address

10. Update the **Lender Loan #** to the loan number as documented in the Originator Loan Origination System (LOS) on the **Loan Summary** screen below **Loan and Property Info** section.

Loan and Property Info | Mortgage Applied for: Conventional | Subject Property Address: 10655 Birch St, BURBANK, CA, 91502-1234

Mortgage Type Applied for Conventional	<input type="checkbox"/> Jumbo	Purpose of Loan Purchase	Total Loan Amount \$ 300,000.00
Purchase Price/Estimated Value \$ 340,000.00	Down Payment \$ 40,000.00	Loan Amount \$ 300,000.00	
Amortization Type Fixed Rate	Note Rate 4.25	Loan Term (in Months) 360	Lender Loan #

11. Click **Save to LOS**.

Contact Information

[Revert to Saved](#) [Save to LOS](#)

12. Click **URLA** in the left navigation pane to review and validate the loan data uploaded.

new URLA - Loan Summary

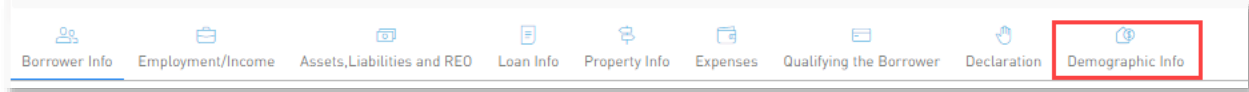
Conditions

Change in Circumstance

new URLA

13. Select the last tab of the **URLA** screen.

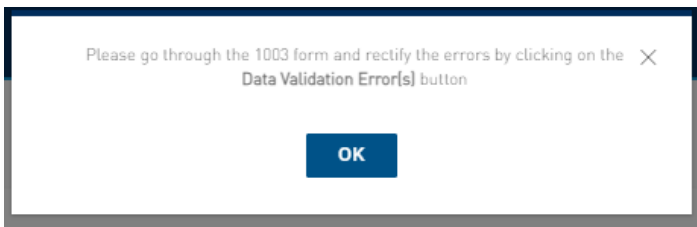
**Note:** The last tab is **Demographic Info** for conforming loans or **HUD** for FHA or VA loans.



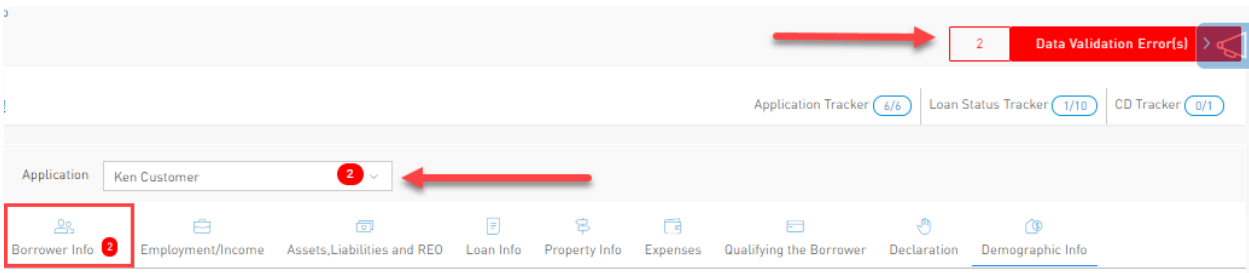
14. Scroll to the bottom of the last screen. Click **Data Validation**.



**Note:** A dialogue box appears if any errors are detected, directing the user to resolve the errors.



- The red **Data Validation Error(s)** alert displays the number of errors next to the customer's name and the **URLA** tabs that require additional information. Click **OK** and navigate to the indicated tabs to make the necessary updates.



Once all the URLA data is validated, continue to **Product & Pricing**.

**Note:** If **Data Validation** is successful, the loan automatically opens to the **Price Loan** screen.