



# Lakeview

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## **Correspondent Non-Delegated Lender Reference Guide**

### **Managing the Pipeline View**





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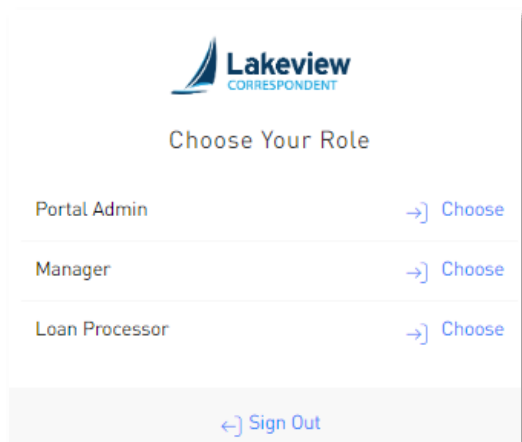
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## 1. User Roles

The user login identifies the user role. The user may be assigned multiple roles when their account is created. After logging in, the role selected at login will determine the user permissions and Pipeline view if multiple roles are listed.

**Example:** Login screen for a user who is assigned multiple roles

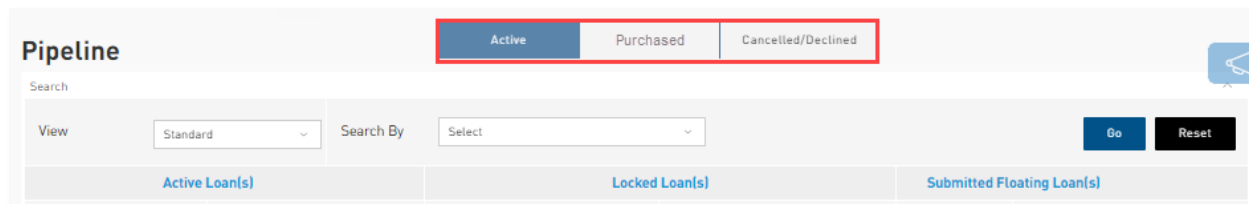


Role	Access
Loan Processor	Can view all the loans they are associated with
Manager	Can view all the loans of processors they manage
Portal Admin	Can view all the loans for the Lender and branch locations

The Pipeline window allows the user to manage the loans that are accessible to them based on the user role as defined and illustrated above and selected at login.

## 2. View by Loan Category

The **Pipeline** view has three categories based on the loan status. The categories include **Active**, **Purchased**, and **Cancelled/Declined**.



### Active

Loans that are currently being processed that the user is associated with. The **Active** is the default view.

### Purchased

Displays all loans the user is associated with that have been purchased.

### Cancelled/Declined

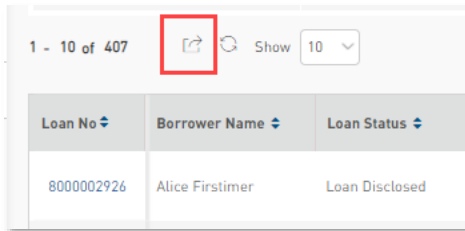
Displays all loans where either the borrower has withdrawn the loan application or is determined to be ineligible.

## 3. Excel View of Pipeline

The user can export the currently visible pipeline view to an excel workbook. The downloaded excel file will have all the columns and search filters applied to the pipeline. The user can filter the list of loans on more columns that are not available using the portal pipeline view (e.g. **Lock Expiration**).

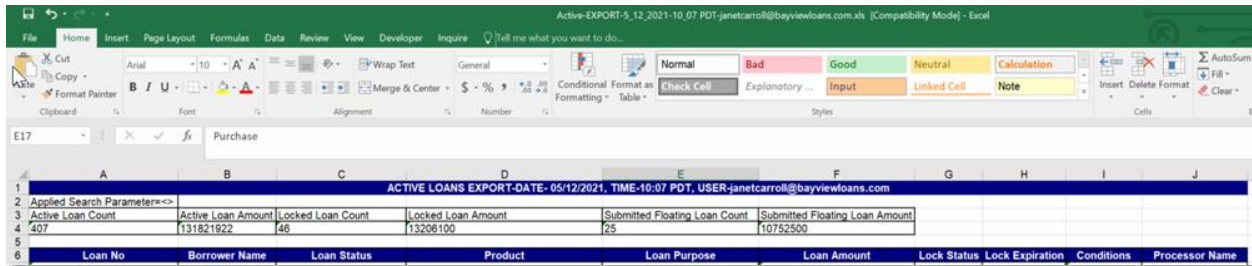
**Note:** The **Pipeline** view sorts by **Lock Expiration**, one of many headers. The user may also add/apply additional column organizers described in [Customize Columns](#).

1. Click the export icon.



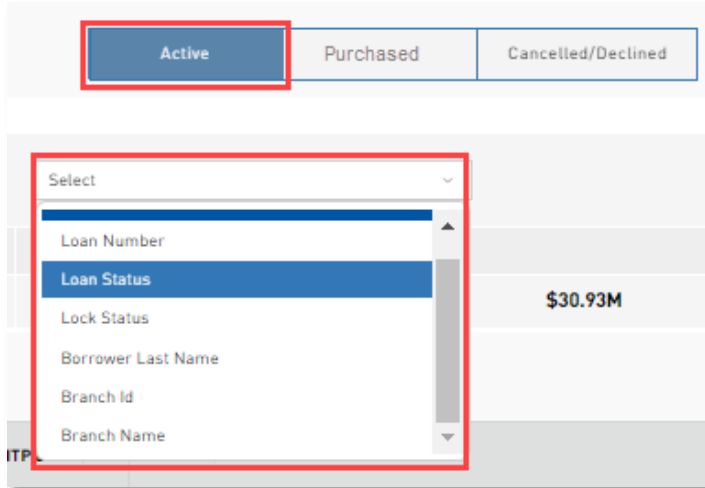
**Outcome:** Depending on the browser settings, the excel file is listed at the bottom of the browser window or opens automatically in Excel.

**Example:** Excel file of **Active** loans listed in the user's **Pipeline**.



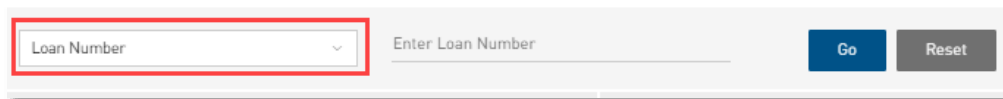
## 4. Search the Active Pipeline

The user role will determine the available search options along with the pipeline category selected. The list of searchable items in the **Active** pipeline is below.

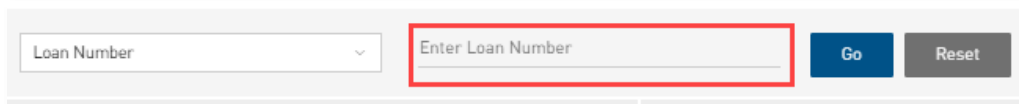


### Search by Loan Number

1. Select **Loan Number**.

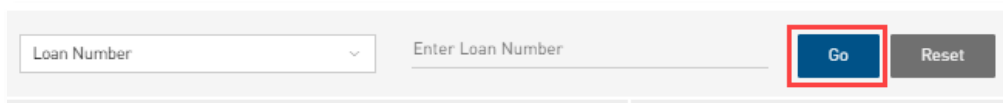


2. Enter the loan number in the space provided.



**Note:** The loan number must be exact. The look-up will not do partial numbers.

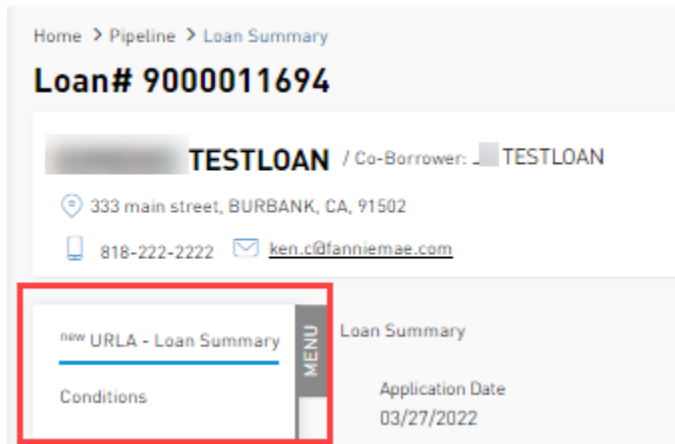
3. Click **Go**.



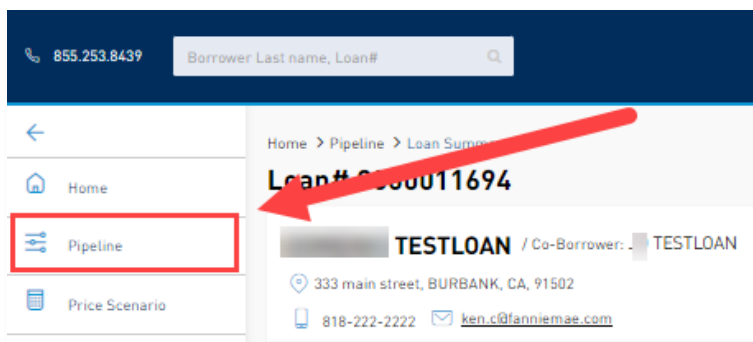
## 4. Search the Active Pipeline, continued

### Search by Loan Number continued

4. Click the **Loan No** to access the portal **MENU** for the specific loan.



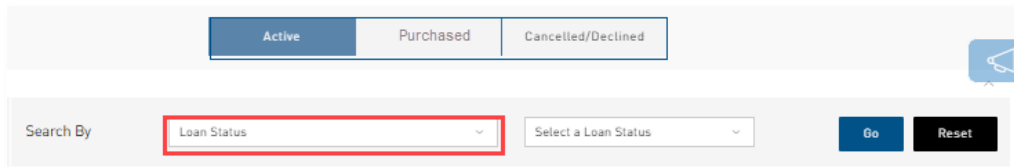
5. Click **Pipeline** to return to the list of loans.



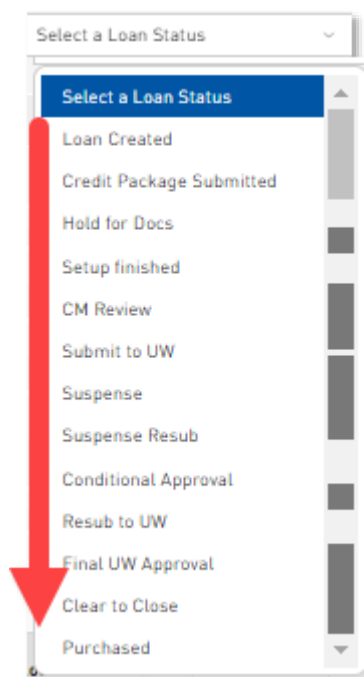
## 4. Search the Active Pipeline, continued

### Search by Loan Status

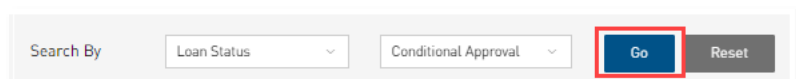
6. Select **Loan Status** using the drop-down menu.



7. Select a loan status from the available drop-down list.



8. Click **Go**.

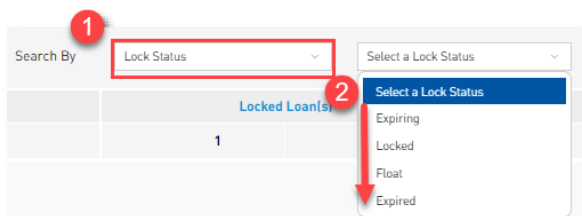




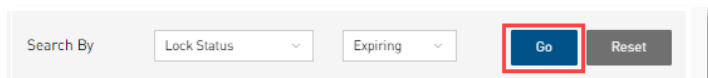
## 4. Search the Active Pipeline, continued

### Search by Lock Status

1. Select **Lock Status** using the drop-down menu.
2. Select a lock status from the available drop-down list.

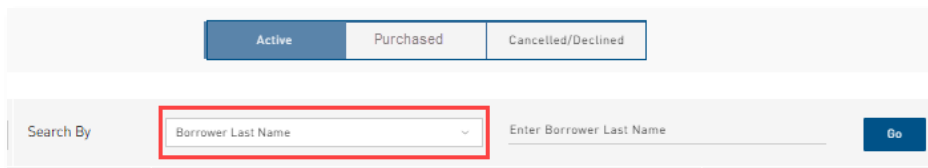


3. Click **Go**.

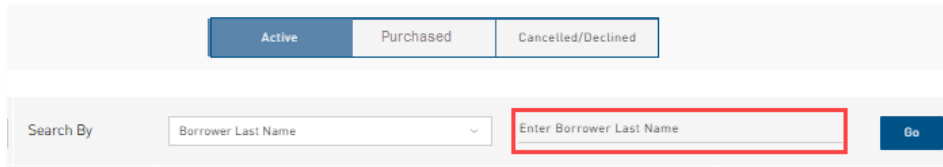


### Search by Borrower Last Name

1. Select **Borrower Last Name** using the drop-down menu.

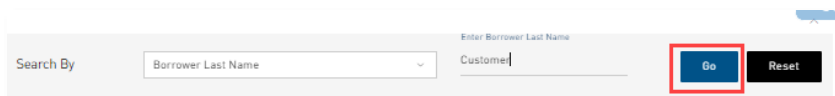


2. Enter the borrower's last name in the space provided.



**Note:** The last name must be entered and spelled correctly.

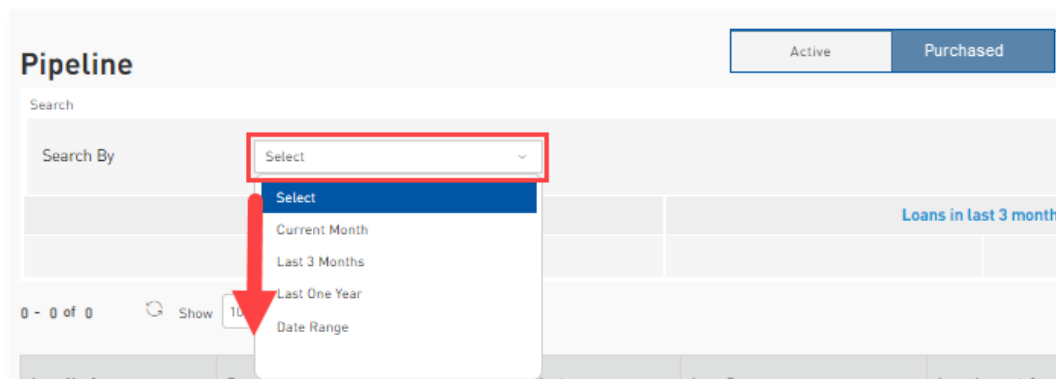
3. Click **Go**.



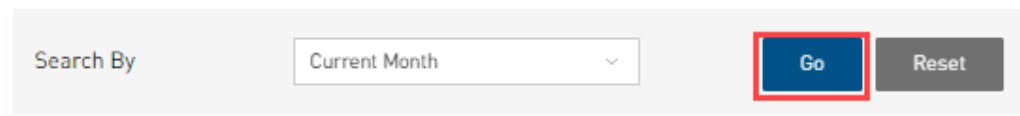
## 5. Other Search Options

### Search the Purchased Pipeline

1. Select the date range to display from the drop-down list.



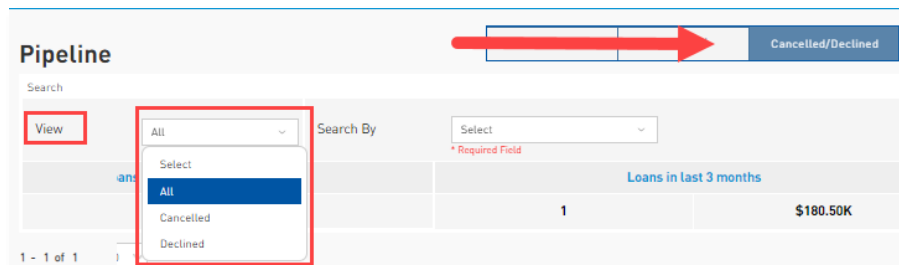
2. Click **Go**.



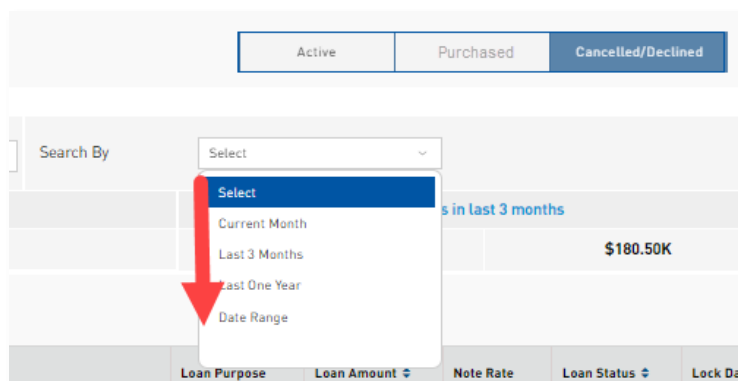
## 5. Other Search Options, continued

### Search for Cancelled/Declined loans

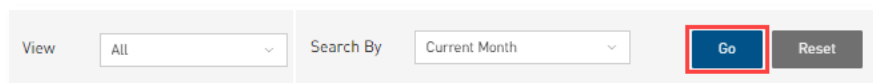
1. Select the loan status from the available drop-down list for **View**.



2. Select the date range to display from the drop-down list.



3. Click **Go**.



## 5. Other Search Options, continued

### Quick Search

The quick search option is available at the top of the portal window. The user can quickly search by entering **Borrower Last Name** or **Loan#**.

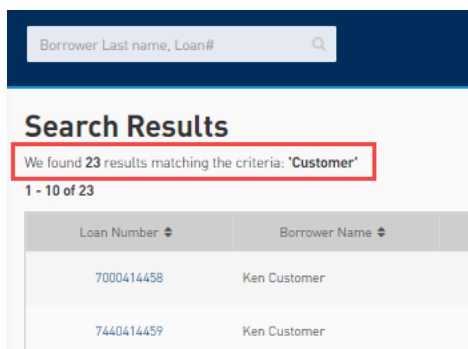
1. Enter the **Borrower Last Name** or **Loan#** in the search box.



2. Press **Enter**.

**Note:** The search results display the list of loans matching the criteria.

- If an exact match is found, the portal will automatically open to the **new URLA – Loan Summary** screen within the matching loan file.



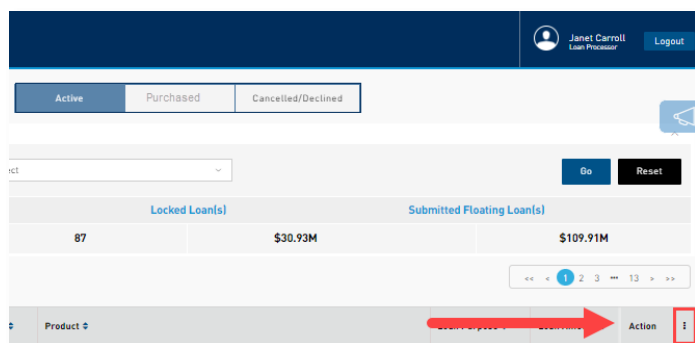
## 6. Customize Columns

The **Column Organizer** permits the user to add/remove columns in the **Active** pipeline view.

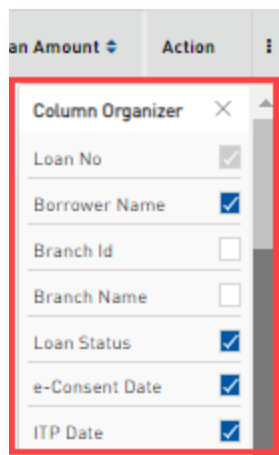
**Note:** The **Column Organizer** is only available in the **Active** pipeline.

- Available columns are determined by the user role.

1. Click three vertical dots (⋮) next to the **Action** column.



2. Select or clear the checkbox to indicate which columns to display in the **Active** pipeline view.



**Note:** Some columns are mandatory and cannot be removed from the view.

3. Click the **X** to close the **Column Organizer**.

