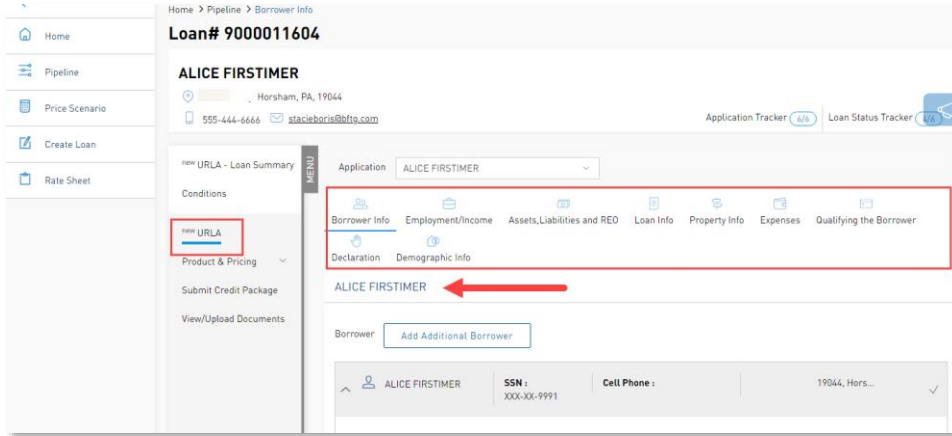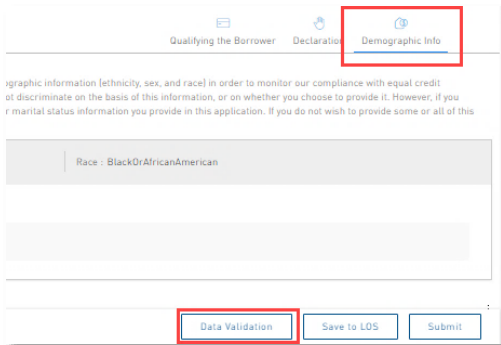1. In the loan file, click the ^{new} **URLA** tab in the navigation pane to view the imported loan information in detail.

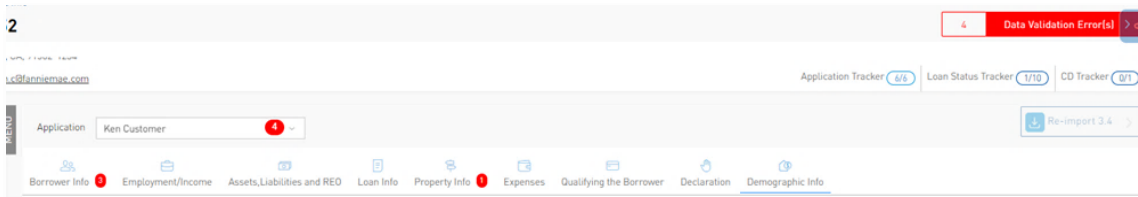*Note:* Use the tabs at the top of the window above the borrower(s) names to navigate the URLA form.

2. Click **Data Validation** on the last tab of the URLA to ensure the required fields have data.

Note: If no validation errors are found, the portal automatically goes to **Price Loan**.

3. If there are errors, resolve before continuing to **Product & Pricing**.

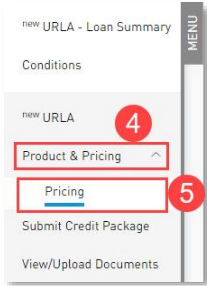*Example:* Four **Data Validation Errors** found must be resolved before **Pricing**.

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4. On the navigation pane, select **Product & Pricing**.

5. Click **Pricing**.

6. Input all required information. Required fields have a red asterisk (*****) next to the field name.

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7. Complete **First Lien Search Criteria**.

   a. Select **Loan Type** from the drop-down list.

      i. If **Loan Type** is **Non-Agency Products**, select the **Non-Agency Product Type**.

   b. Select **Yes** or **No** for **Interest Only**.

   c. Select **Prepayment Penalty**.

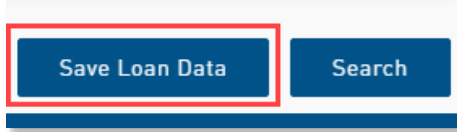   d. Select the number of days in the **Desired Lock Period (Days)** from the drop-down menu.

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8. Click **Save Loan Data**.

Note: Any missing data results in error.

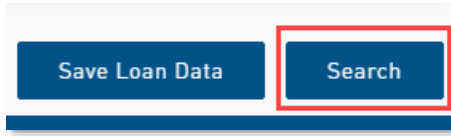*Example:* Missing **Purchase Price** and warning at the top of the screen.

9. Input any missing data and click **Save Loan Data** again.

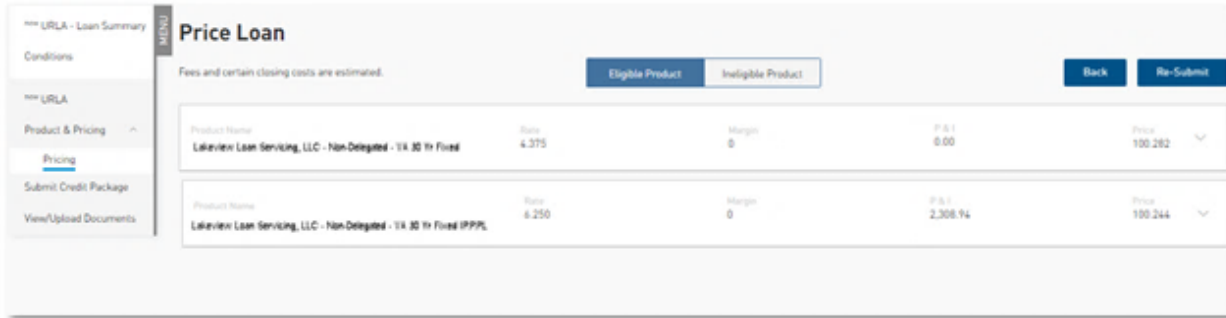*Note:* You cannot proceed until all required fields have information and loan data has been saved.

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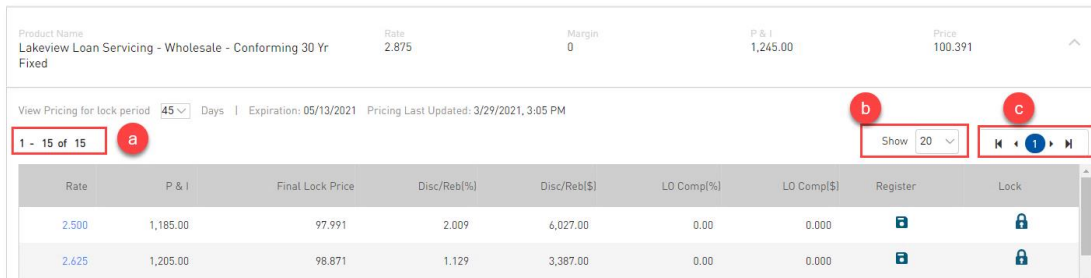10. Click **Search**.

Outcome: A list of eligible products displays.

11. Select a product from the list to view the expanded rate stack.

    a. Indicates the number of rates offered in a rate stack.

    b. Indicates the number of rates to **Show** on a page.

    c. Page buttons to advance or retreat viewing of rates based on the number of rates listed per page.

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12. Select **Register** (float) or **Lock** to indicate the desired rate.

Outcome: Pop-up window shows details of rate selected.

13. Click **Yes** to select.

Outcome: A green bar with a checkmark confirms the saved pricing information.
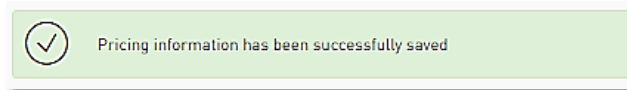
Example: Below is a pipeline view of loans after the product and price selection.

Note: Lock confirmation generates the message shown below.

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