

Manually enter the URLA/1003 data to create a loan application or import 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.

Primary Contacts		Welcome .	
VP 215-793-8825 Stackeboris@bthg.com Technical Support B55-253-8429 (IIS LAKEVIEW) option 3	Pipeline	Price Scenario	Create Loan

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

$\rightarrow$	
G	Create Loan
	Import 3.4 Manual
	Accepted file formats: xml Note: Maximum file size is 10 MB
×	
۵	Drag & Drop your 3.4(.xml) file here or
9	Choose File

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

4. Click Save Loan Data.

Accepted file formats: xml		Note: Maximum file size is 10 MB
	Drag & Drop your 3.4(.xml) file here	
	or	
	Choose File	
DI-FHAD2_v3.4 XML_FHA Refi_PriorFHA.xml 28.97 Kb		
Originating Branch Address (ID) 1865080964		
		Save Loan Data

Lakeview Loan Servicing Proprietary and Confidential Orig: May 7, 2022\_JC Correspondent Non-Delegated Lenders, BDD Non-Del Import a Loan Page 1 of 4





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

Create Loan 🚽			
	Import 3.4	Manual	]
	Enter the date when six applie	ation elements	* were received?
		Vext	

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

reate Loan		Import 3.4	Manual							
	Enter the date w	vhen six applica	ation eleme	nts*	were	e rec	eiv:	ed?		
				<		Ма	y 202	2		>
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		N		Su 1 8	2	<b>Tu</b> 3 10 17	We 4 11	<b>Th</b> 5 12	6 13	<b>Sa</b> 7 14
		N		Su 1 8 15	2 9 16	<b>Tu</b> 3 10 17	We 4 11 18	Th 5 12 19	6 13 20	<b>Sa</b> 7 14 21

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

Home > Pipetine > Loan Summary				
<ul> <li>⊙ 10655 Birch St, BURBANK, CA, 91502-1234</li> <li>☑ 818-222-2222 <sup>™</sup> ken.c0tannismae.com</li> </ul>			Application Tracker 🔬	n Status Tracker (1/6)
Cenditions Generation Date 05/13/2022	ITP Received Date -	Est. Closing Date -	Lock Expiration Date	

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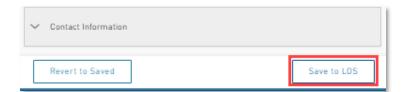
9. Enter a **FICO** score on the **Loan Summary** screen below the **Borrower and Employment Information** section.

Application Date	ITP Received Date	Est. Closing Date
05/13/2022	-	-
Approval Date	DTI/DSCR	Loan Status
-	12.52 / 15.85	Loan Created
Product	Base LTV / CLTV	
-	88.24% / 88.24%	
Borrower And Employment Information	ODMENIC TESTLOAN	2
Borrower And Employment Information Borrower	ODMENIC TESTLOAN	Add Co-Borrower
	DOMENIC TESTLOAN	·
Borrower		·
Borrower First Name DOMENIC SSN	Last Name TESTLDAN Email	·
Borrower First Name DOMENIC	Last Name TESTLOAN	·
Borrower First Name DOMENIC SSN	Last Name TESTLDAN Email	·

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	Jumbo	Purpose of Lean Purchase v	
Purchase Price/Estimated Value \$ 340,000.00	Down Payment \$ 40,000.00	Lean Amount 5 300,000.00 \$ 300,000.00	
Amortization Type Fixed Rate	Note Rate 4.25	Loan Term (in Months) 360 Lender Loan #	

## 11. Click Save to LOS.



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



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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**.

Data Validation	Save to LOS	Submit
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*Note:* A dialogue box appears if any errors are detected, directing the user to resolve the errors.

Please go through the 1003 form and rectify the errors by clicking on the Data Validation Error[s] button	×
ок	

• 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.

2							-	2 Data Valid	ation Error(s)
I						Application Tracker (	6/6 Loan S	tatus Tracker (1/10)	CD Tracker 0/1
Application Ke	n Customer	2 ~		_					
<u>ුං</u> Borrower Info <mark>2</mark>	😑 Employment/Income		Loan Info	😫 Property Info	Expenses	Cualifying the Borrower	ی Declaration	Operation of the second sec	

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.

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