



Lakeview

Correspondent Lending Reference Guide

Client Web Administration





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1. Client Site: Access and Login

Use the steps below to access LoanDock, the Lakeview Correspondent Delegated/Closed loan client portal.

1. Open your browser to lakeviewcorrespondent.com.

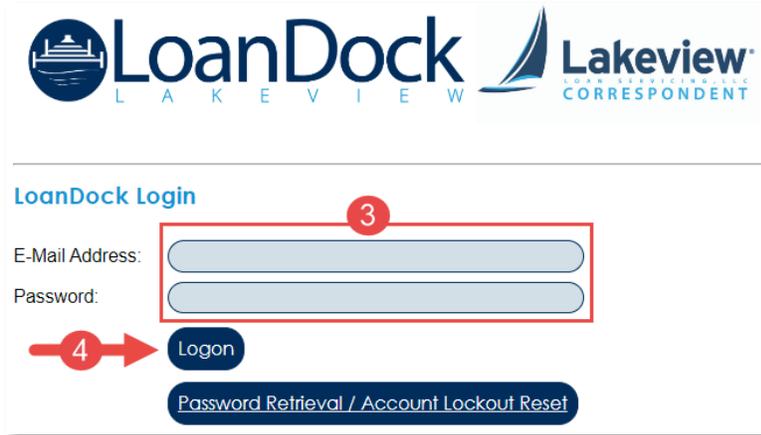
Note: We recommend you save this website address as a Favorite.

2. Click **Delegated/Closed Loan Portal** at the upper right-hand corner of the website.



1. Client Site: Access and Login, continued

3. On the **LoanDock Login** page, enter your **E-mail Address** and **Password**.
4. Click **Logon**.



Note: If you have difficulty logging in, please contact **Client Services** at ClientServices@Lakeview.com or 1.855.253.8439 for assistance.

Outcome: The **Daily Turn Times** screen displays.

Turn Times
Registration/Lock/Pricing
Current Rate Sheet
Closed Loan ▾
Non-Agency SLV Submission
Resources ▾
Admin ▾
User Profile
Logout

Daily Turn Times

All Turn Times are Approximate and Updated Daily

	Initial Review:	Condition Clearing:	Collateral Review:
Conv/Gov't/HFA	3 Days	2 Days	3 Days
Jumbo	7 Days	3 Days	3 Days
Non-Agency	7 Days	3 Days	3 Days

(In Average Business Days)

TURN TIMES ARE BASED ON RECEIPT OF LOAN IMAGES AND ULDD (XML) DATA FILE (WHEN APPLICABLE)

Initial review: Number of business days from file receipt date to completion of the credit and compliance review
Condition Review: Number of business days from trailing document receipt date to the completion of the condition review
Collateral Review: Number of business days from collateral receipt date to the completion of the custodian's collateral review

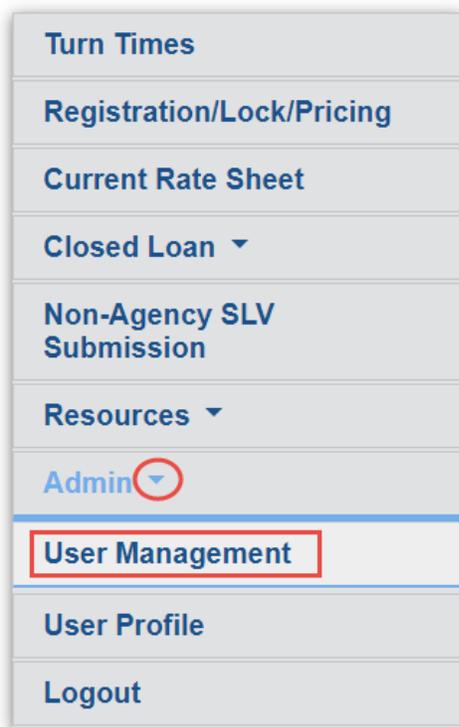
2. User Management

The individual(s) designated as your company's Web Admin(s) have website administrative access to our system. The Web Admin performs these functions for your company:

- [Add new users](#)
- [View/edit the entire list of users](#)

Add New Users

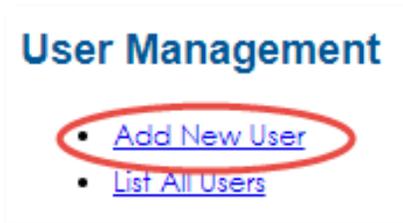
1. After logging into the system, click **Admin** and select **User Management** on the left navigation bar.



2. User Management, continued

Add New Users, continued

1. Click **Add New User**.



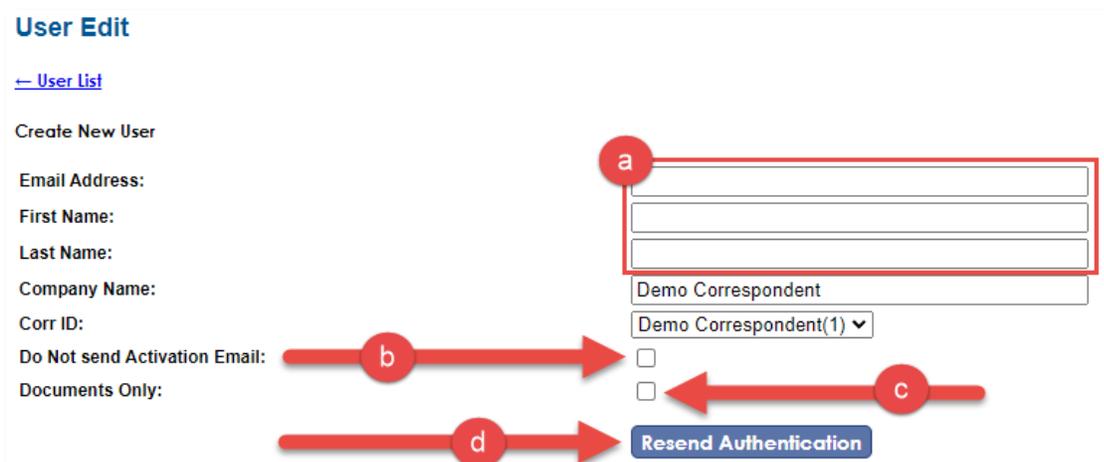
2. In the **User Edit** section of the screen, complete all applicable fields:

- a. Enter the new user's information:

- **Email Address**
- **First Name**
- **Last Name**

Note: The **Company Name** and **Corr ID** pre-populate with your company name.

- b. Check the **Do Not send Activation Email** checkbox to show the **Authentication URL** on the screen to copy and send to the new user rather than via an automated email.
- c. Check the **Documents Only** checkbox if you want the user only to have access to a scaled-down version of the left navigation bar without the **Loan Registration/Lock/Pricing, Deliver Loans/TDOCs, and Reporting** options.
- d. **Click Resend Authentication** to send a new automated email to a new user if their **Authentication URL** has expired.



2. User Management, continued

Add New Users, continued

3. In the **User Access Information** section, select at least one **Job ID** for the user to appear in the **User List**.
 - **6033 Bayview/Lakeview Closed Loan**
 - Select the **Client Access** checkbox if the user submits closed loans for Lakeview to purchase.
 - Select the **Rate Sheet Access** checkbox to allow the user to view the daily rate sheet.
 - In the **7303 Pricing Engine** row, select **Seller User** from the **Registration/Lock Access** drop-down menu to give the user permission to lock a loan.
 - If you do not want to grant that permission, keep the selection as **None**.
4. Click **Save**.

User Access Information

Job ID	Description	Client Access	Registration/Lock Access	Rate Sheet Access
6033	BayView/Lakeview Closed Loan	<input type="checkbox"/>		<input type="checkbox"/>
7303	Pricing Engine		None	

[Save](#)

Outcome: The new user automatically receives a **Credential Information for Bayview/Lakeview Client Site** email, which includes an authentication link to set their password.

You have been given access to the Bayview/Lakeview Client website.

Your login is your email address, [redacted]

Click on the link below to create a password. This link will expire in 14 days.

<https://www.BayviewTPO.com/UserAuthentication.asp?ID={4C2B07AF-7C1F-414F-AA57-205BE6AC8COA}>

Your Activation Code

4C2B07AF-7C1F-414F-AA57-205BE6AC8COA

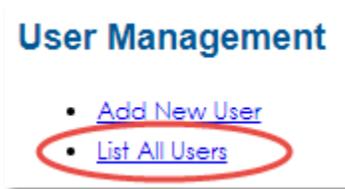
You can access the Client site at:

<https://www.BayviewTPO.com/Client/bayview.asp>

2. User Management, continued

List All Users

- To view a list of all users at your company, click the **List All Users** link on the **User Management** screen:



Outcome: The user list displays and allows you to view all users at your company, as well as the job IDs and roles granted to each user.

Email Address	First Name	Last Name	Company	Seller ID	Seller Name	Client Access	PE Access	CorrWeb Manager	HFA Access	Documents Only	Active
doonly@demo.com	Doc	Only	Demo Correspondent							6033	<input checked="" type="checkbox"/>
testingdocsonly@1.com	Test	DocsOnly	Demo Correspondent							6033	<input checked="" type="checkbox"/>
training@1.com	USER	DEMO	Demo Correspondent	1	Demo Correspondent	6033		6033			<input checked="" type="checkbox"/>

Editing a User

- Click the user's email address.

Email Address	First Name
doonly@demo.com	Doc
testingdocsonly@1.com	Test

- Make any desired changes and click **Save**.

User Edit

[← User List](#)

Email Address:

First Name:

Last Name:

Company Name:

Corr ID:

Do Not send Activation Email:

Documents Only:

User Access Information

Job ID	Description	Client Access	Registration/Lock Access	Rate Sheet Access
6033	BayView/Lakeview Closed Loan	<input type="checkbox"/>		<input type="checkbox"/>
7303	Pricing Engine		None	<input type="checkbox"/>

2. User Management, continued

Disabling a current user

1. To disable an existing user, click their email in the **User List**.

Email Address	First Name
doonly@demo.com	Doc
testingdoconly@1.com	Test

2. In the **User Edit** screen, click **Disable User**.

User Access Information

Job ID	Description	Client Access	Registration/Lock Access	Rate Sheet Access
6033	BayView/Lakeview Closed Loan	<input checked="" type="checkbox"/>		<input type="checkbox"/>
7303	Pricing Engine			

Seller User ▼

[Save](#) [Disable User](#)

Outcome: A **User Successfully Disabled** message appears at the top of the screen once complete.

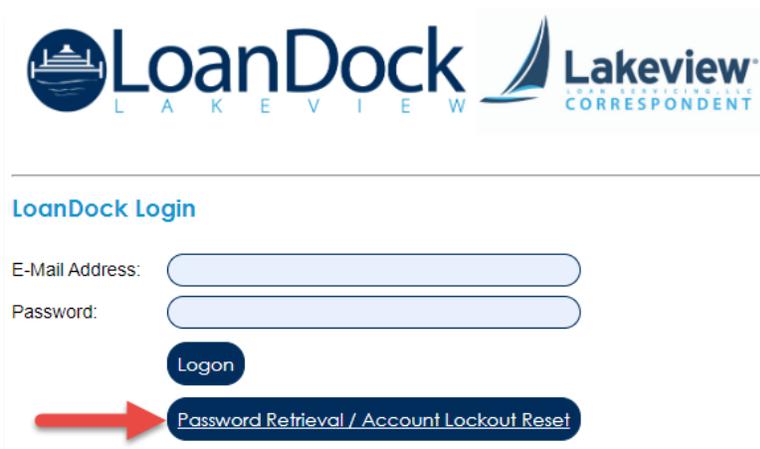


Note: To reactivate a user, add them as a new user.

Resetting a Password

Users can now reset their own password using the instructions below.

1. On the **LoanDock Login** screen, click **Password Retrieval/Account Lockout Reset**.



LoanDock Login

E-Mail Address:

Password:

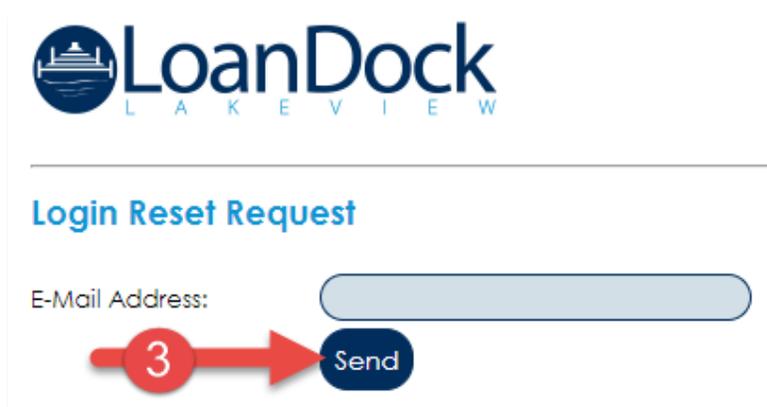
[Logon](#)

[Password Retrieval / Account Lockout Reset](#)

2. User Management, continued

Resetting a Password, continued

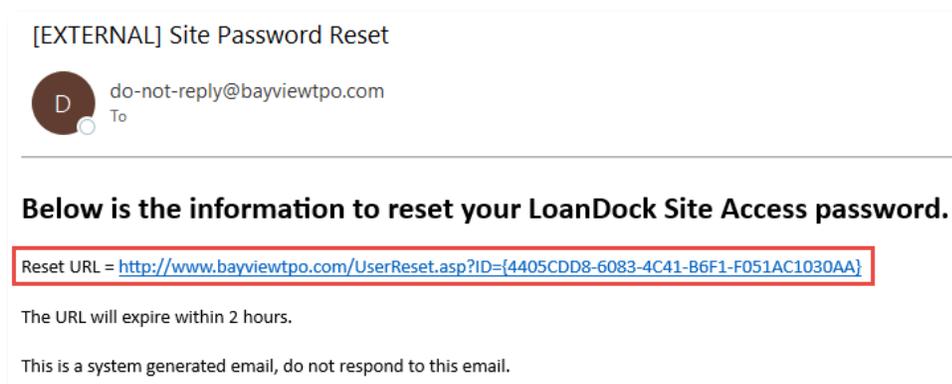
2. On the **Login Reset Request** screen, enter your **E-mail Address**.
3. Click **Send**.



Outcome: You will receive an email containing a password reset URL.

- The URL expires 2 hours after it was sent.

4. Open the email and click the **Reset URL** link.

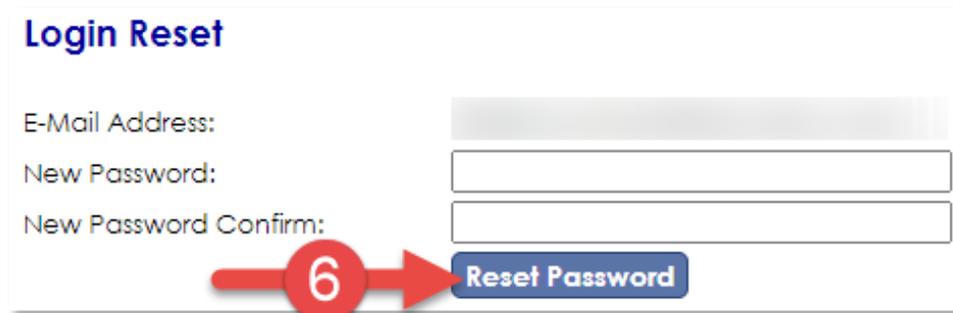


5. Type the new password in the **New Password** field and again in the **New Password Confirm** field.

2. User Management, continued

Resetting a Password, continued

6. Click **Reset Password**.



The screenshot shows a web form titled "Login Reset". It contains three input fields: "E-Mail Address:", "New Password:", and "New Password Confirm:". Below the "New Password Confirm:" field is a blue button labeled "Reset Password". A red arrow with the number "6" inside a circle points to the "Reset Password" button.

Outcome: You are routed to the **LoanDock Login** screen to enter your new credentials.

- Please note your new password, as the system does not save or have a record of them.