

Non-Delegated

Correspondent Lender Reference Guide

Create Loan



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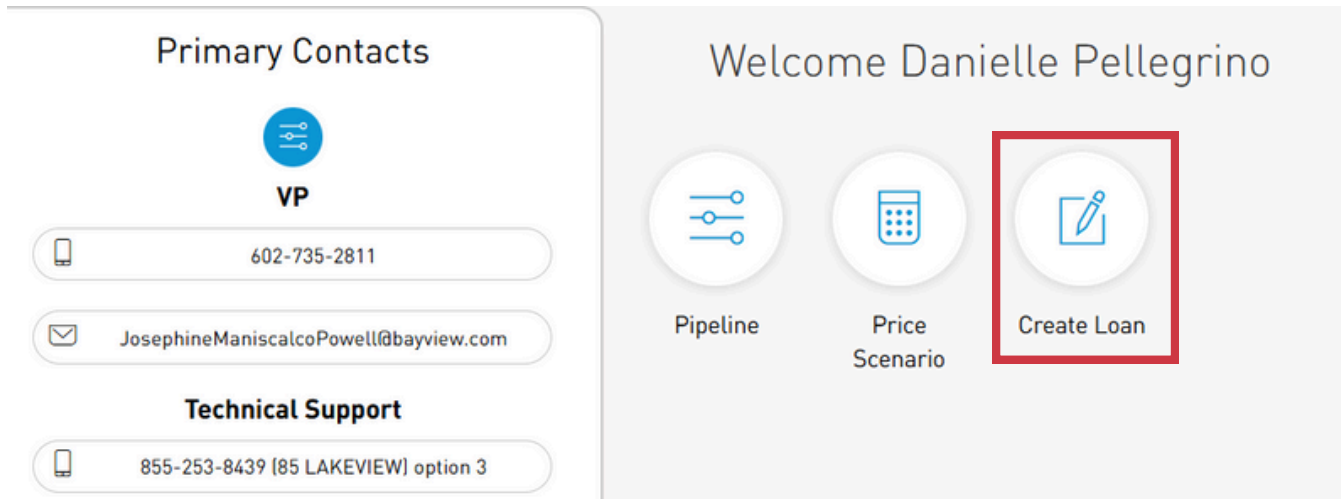
03.03.25

Create Loan

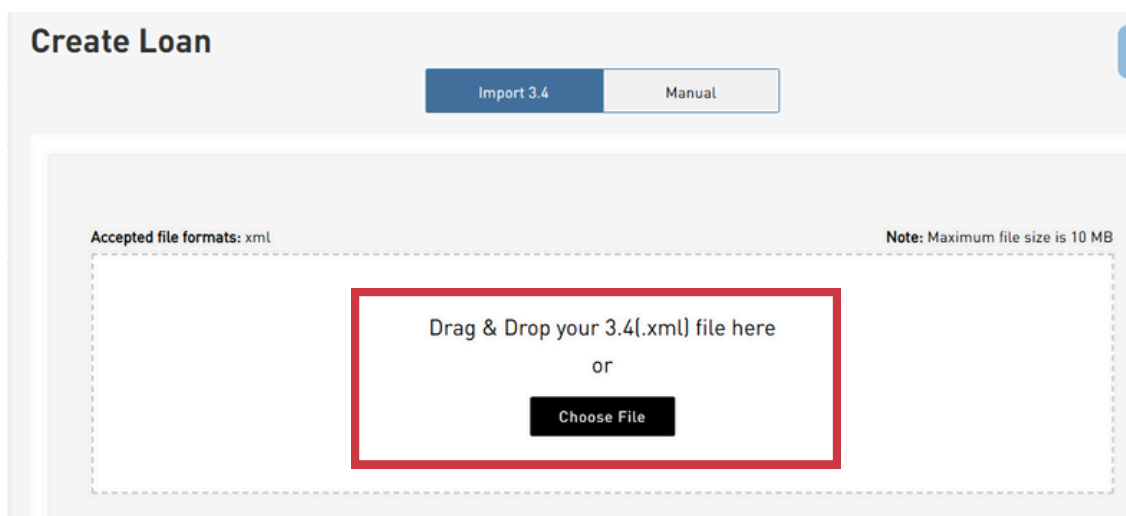
Manually enter the URLA/1003 data to create a loan application or import a 3.4.xml file. Importing the 3.4.xml file allows for quick loan creation. Follow the steps below to upload the loan file.

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.



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.*



Create Loan

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](#)

NondeL_DSCR_updated.XML 30.85 Kb

Originating Branch Address (ID)
7984986556


[Save Loan Data](#)

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

Create Loan 

[Import 3.4](#) [Manual](#)

Enter the date when six application elements* were received?


[Next](#) 

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

Create Loan

[Import 3.4](#) [Manual](#)

Enter the date when six application elements* were received?

[Next](#) 

< May 2022 >

Su	Mo	Tu	We	Th	Fr	Sa
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31	1	2	3	4
5	6	7	8	9	10	11



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

Home > Pipeline > Loan Summary

Loan# 9000009656

PA BREYTMAN
422 PA Way, Miami, FL, 33101
777-888-9999 | stacieboris@bftg.com

Application Tracker 6/6 | Loan Status Tracker 1/6

new URLA - Loan Summary | Loan Summary

Conditions	Application Date	ITP Received Date	Est. Closing Date	Lock Expiration Date
	01/01/2024	-	-	-

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

Borrower And Employment Information | PA BREYTMAN

Borrower Add Co-Borrower

First Name PA	Last Name BREYTMAN
SSN XXX-XX-9999	Email stacieboris@bftg.com
Cell Phone (888) 777-9999	FICO



Create Loan

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.

The screenshot shows the 'Loan and Property Info' section of the Loan Summary screen. The 'Lender Loan #' field is highlighted with a red box. A red arrow points from the 'Subject Property Address' field to the 'Lender Loan #' field.

Loan and Property Info		Mortgage Applied for : Conventional	Subject Property Address : , 422 PA Way, Miami, FL, 33101
Mortgage Type Applie... Conventional	<input type="checkbox"/> Jumbo	Purpose of Loan Refinance	
Purchase Price/Estimate... \$ 157,000.00	Loan Amount \$ 100,750.00	Total Loan Amount \$ 100,750.00	
Amortization Type Fixed Rate	Note Rate 3.75	Loan Term (in Months) 360	Lender Loan #

11. Click **Save to LOS**

The screenshot shows the bottom of the Loan Summary screen. The 'Save to LOS' button is highlighted with a red box.

Contact Information

Revert to Saved

Save to LOS

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

The screenshot shows the left navigation pane with the following items:

- new [URLA - Loan Summary](#)
- Conditions
- new [URLA](#)

The 'new URLA' item is highlighted with a red box.

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.

The screenshot shows the bottom navigation bar with the following tabs:

- Borrower Info
- Employment/Income
- Assets, Liabilities and REO
- Loan Info
- Property Info
- Expenses
- Qualifying the Borrower
- Declaration
- Demographic Info**

The 'Demographic Info' tab is highlighted with a red box.



Create Loan

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

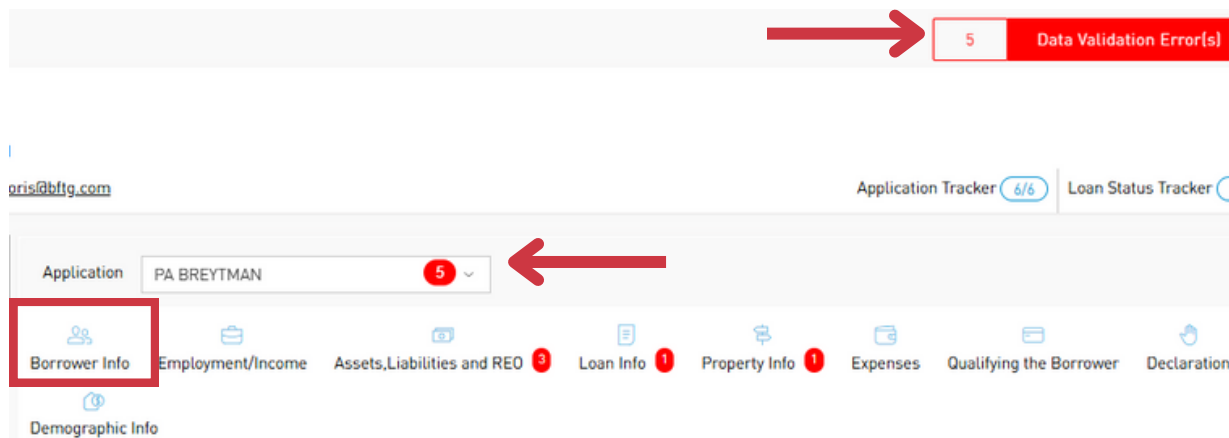


Note: A dialogue box appears if any errors are detected, directing the user to resolve the errors.

Please go through the 1003 form and rectify the errors by clicking on the **Data Validation Error(s)** button



- 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.