

# Non-Delegated

## Correspondent Lender Reference Guide

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Create Loan



**Silver Hill Capital**



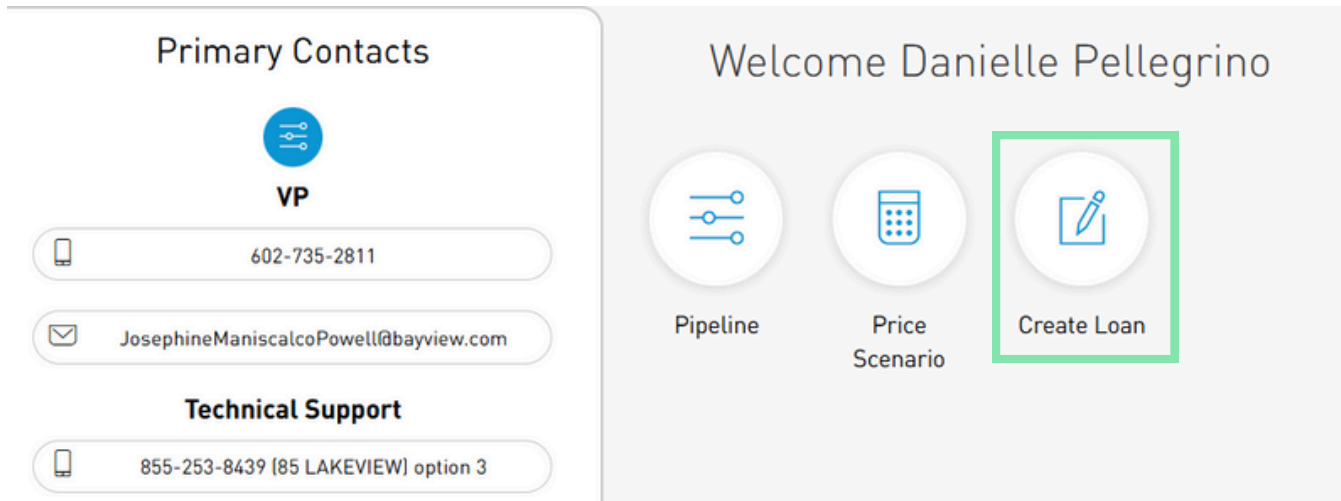
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## Create Loan

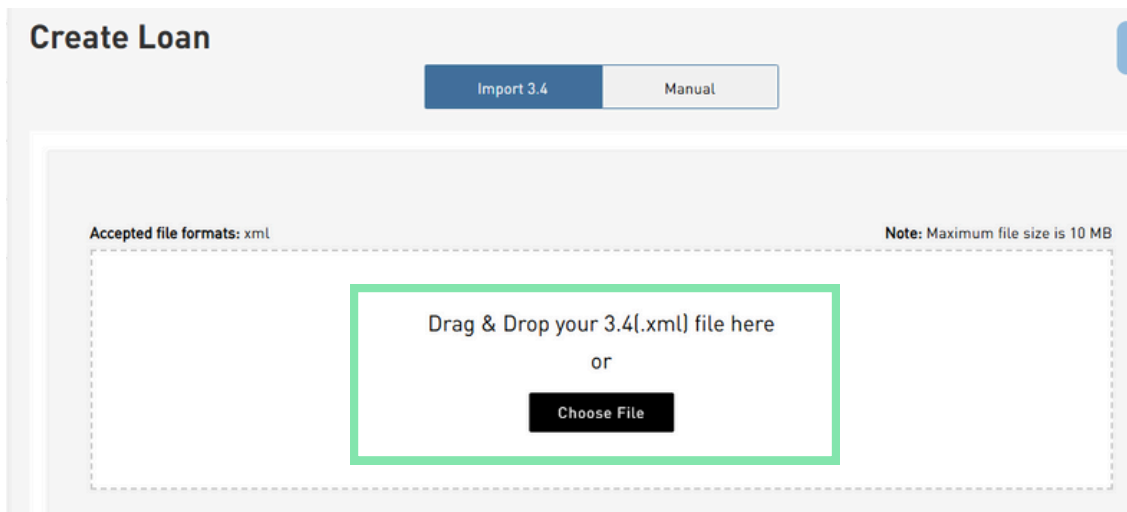
Manually enter the URLA/1003 data to create a loan application or import a 3.4.xml file. Importing the 3.4.xml file allows for quick loan creation. Follow the steps below to upload the loan file.

**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 3.4Manual

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 3.4Manual

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

# Create Loan

**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 01/01/2024

ITP Received Date -

Est. Closing Date -

Lock Expiration Date -

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

Borrower And Employment Information

PA BREYTMAN

Borrower

First Name PA

Last Name BREYTMAN

SSN XXX-XX-9999

Email stacieboris@bftg.com

Cell Phone [888] 777-9999

FICO

Add Co-Borrower



# 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.

Loan and Property Info

Mortgage Applied for :  
Conventional

Subject Property  
Address :  
, 422 PA Way, Miami, FL,  
33101

Mortgage Type Applie...  
Conventional

☐ 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**

Contact Information

Revert to Saved

Save to LOS

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

new URLA - Loan Summary

Conditions

new URLA

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.

Borrower Info

Employment/Income

Assets, Liabilities and REO

Loan Info

Property Info

Expenses

Qualifying the Borrower

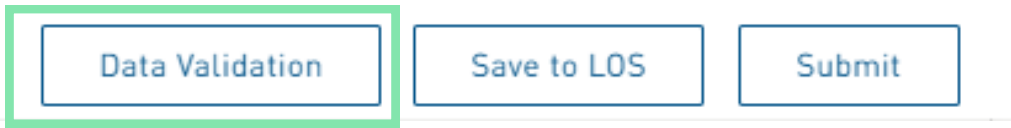
Declaration

Demographic Info

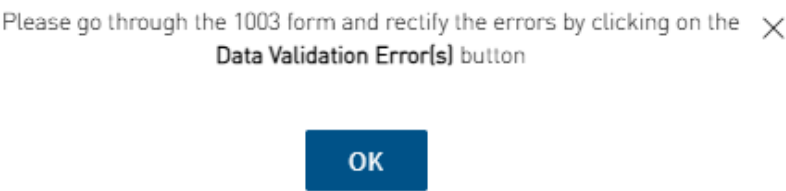


# Create Loan

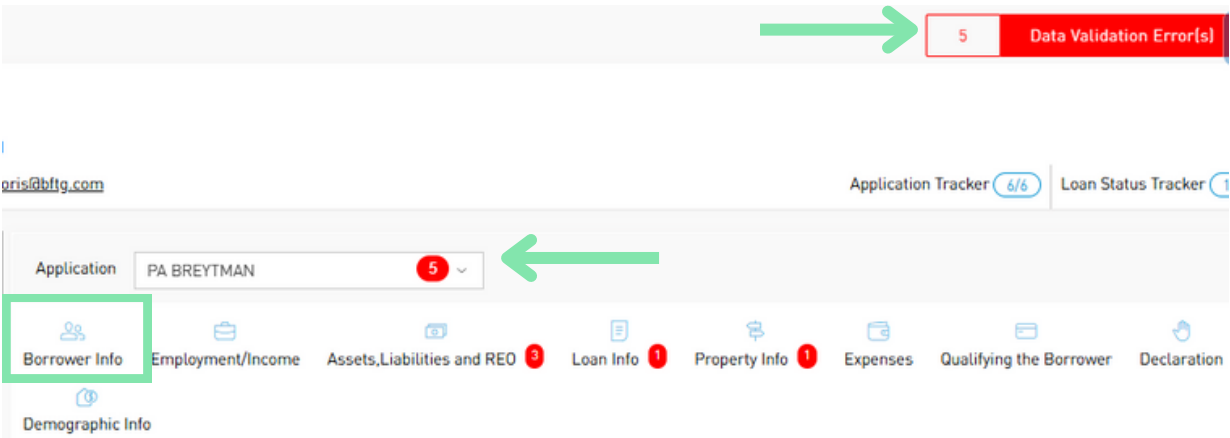
14. Scroll to the bottom of the last screen. Click **Data Validation**



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



- 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.