Non-Delegated

Correspondent Lender Reference Guide

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Create Loan

Silver Hill Capital
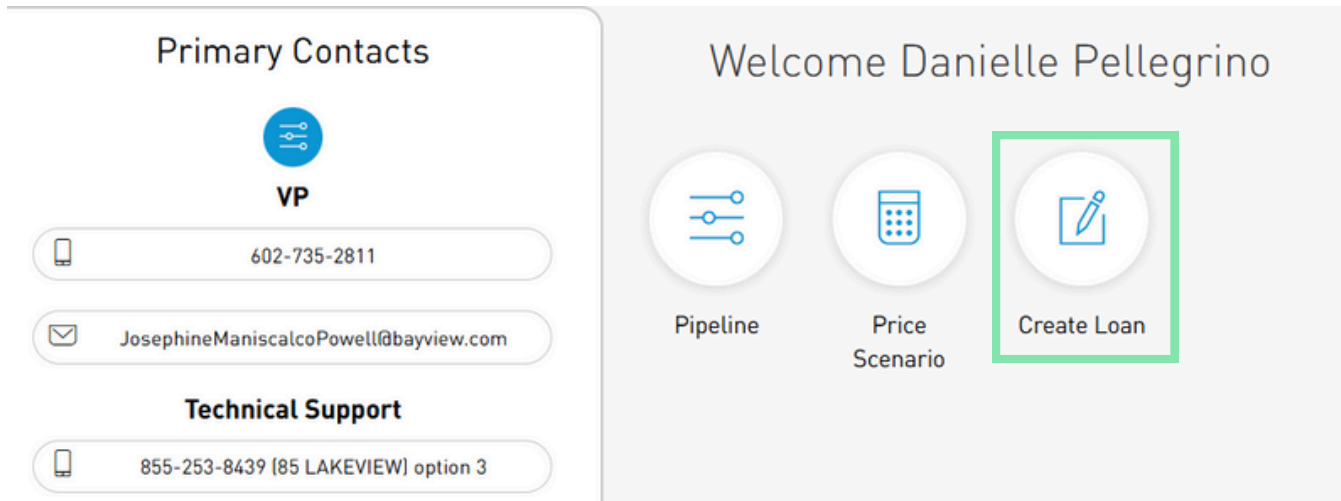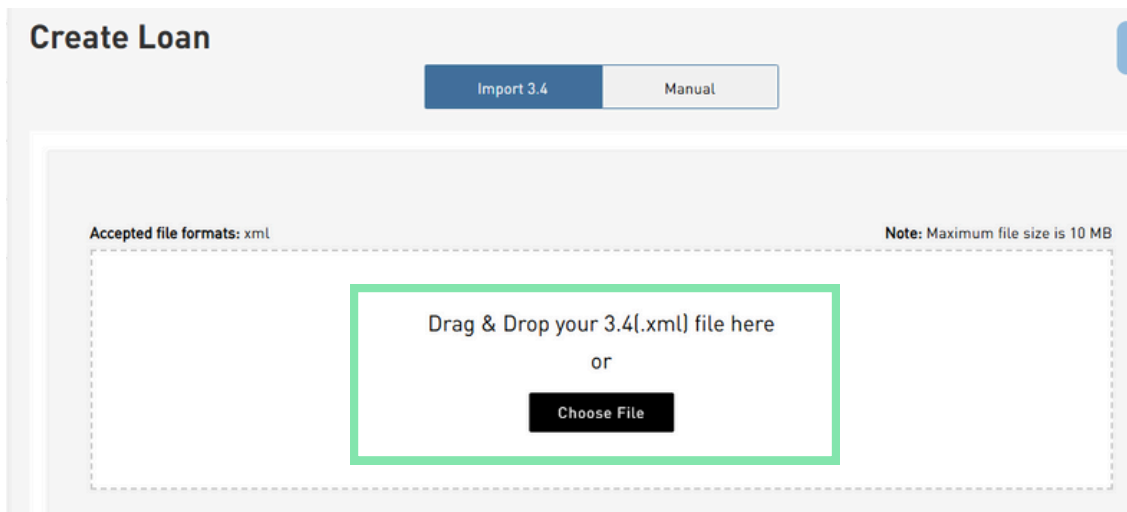
Create Loan

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 <u>Lakeview Correspondent Non-Delegated Portal</u>

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

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

4. Click S**ave 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

Create Loan

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

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

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.

11. Click **Save to LOS**

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

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.*

Create Loan

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

| Data Validation | Save to LOS | Submit |

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

OK

- 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.

5   Data Validation Error(s)

pris@bftg.com   Application Tracker 6/6   Loan Status Tracker 1

Application   PA BREYTMAN   5 ⌄

Borrower Info   Employment/Income   Assets,Liabilities and REO 3   Loan Info 1   Property Info 1   Expenses   Qualifying the Borrower   Declaration
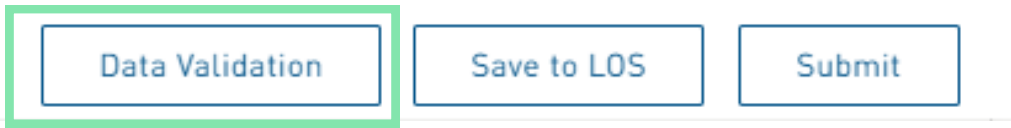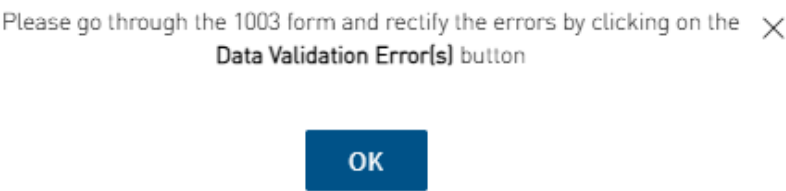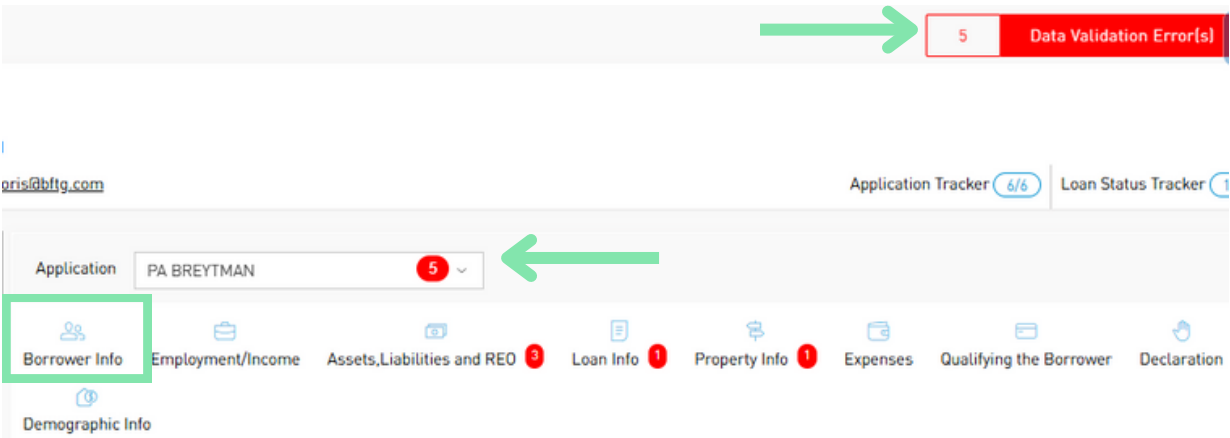
Demographic Info

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.*