Non-Delegated

Correspondent Lender Reference Guide

Managing the Pipeline View

Silver Hill Capital

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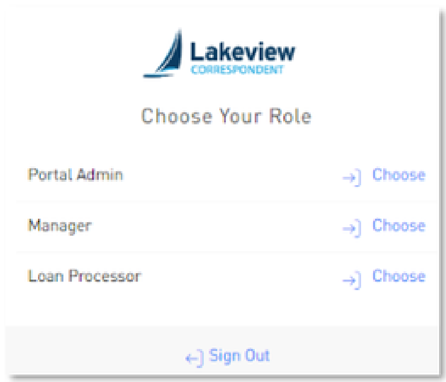
Managing the Pipeline View

1. User Roles

The user login identifies the user role. The user may be assigned multiple roles when their account is created. The role selected at login determines the user permissions and Pipeline view if multiple roles are listed.

Example: Login screen for a user who is assigned multiple roles



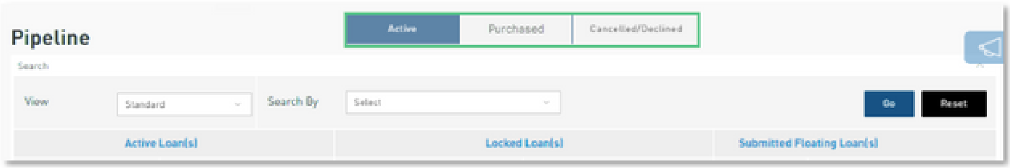
Role	Access
Loan Processor	Can view all the loans they are associated with
Manager	Can view all the loans of processors they manage
Portal Admin	Can view all the loans for the Lender and branch locations

The Pipeline window allows the user to manage the loans that are accessible to them based on the user role as defined and illustrated above and selected at login

Managing the Pipeline View

2. View by Loan Category

The **Pipeline** view has three categories based on the loan status. The categories include **Active, Purchased,** and **Cancelled/Declined**



- **Active** – Loans the user is associated with that are currently being processed. Active is the default view.
- **Purchased** – Displays all loans the user is associated with that have been purchased.
- **Cancelled/Declined** – Displays all loans where the borrower has withdrawn the loan application or is determined to be ineligible.

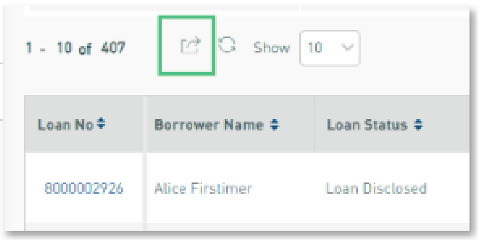
Managing the Pipeline View

3. Excel View of Pipeline

The user can export the currently visible pipeline view to an excel workbook. The downloaded excel file will have all the columns and search filters applied to the Pipeline. The user can filter the list of loans on more columns that are not available using the portal pipeline view (e.g., **Lock Expiration**).

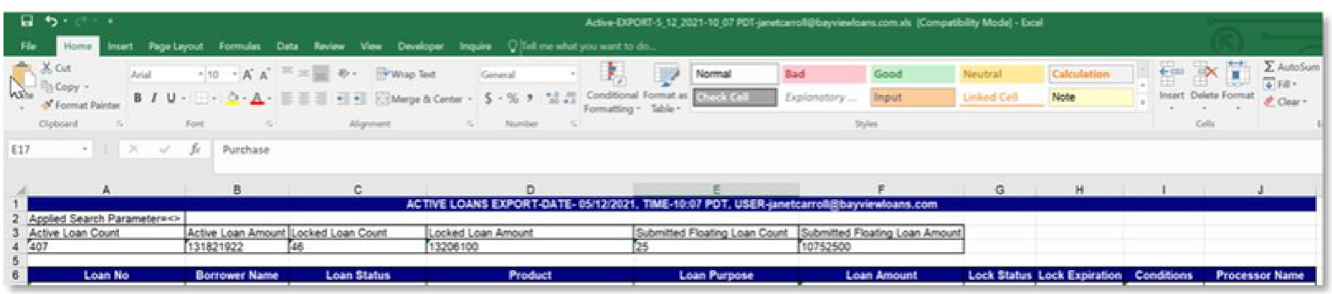
Note: The **Pipeline** view sorts by **Lock Expiration**, one of many headers. The user may also add/apply additional column organizers described in Customize Columns.

1. Click the export icon



Outcome: Depending on the browser settings, the excel file is listed at the bottom of the browser window or opens automatically in Excel.

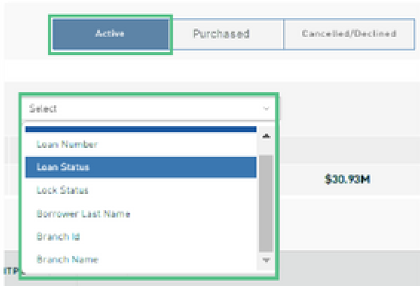
Example: Excel file of **Active** loans listed in the user's **Pipeline**

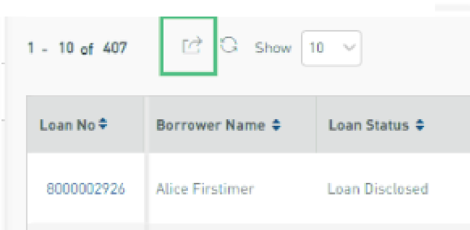


Managing the Pipeline View

4. Search the Active Pipeline

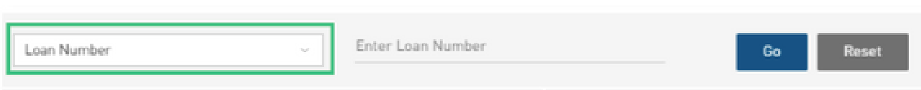
The user role determines the available search options along with the pipeline category selected. The list of searchable items in the **Active** Pipeline is below.



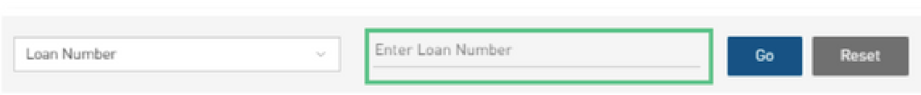


Search by Loan Number

1. Select **Loan Number**

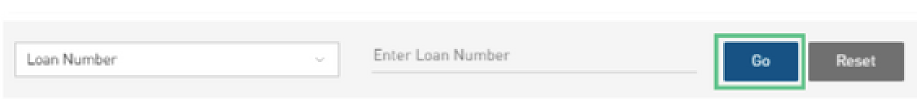


2. Enter the loan number in the space provided



Note: The loan number must be exact. The look-up will not do partial numbers

3. Click **Go**

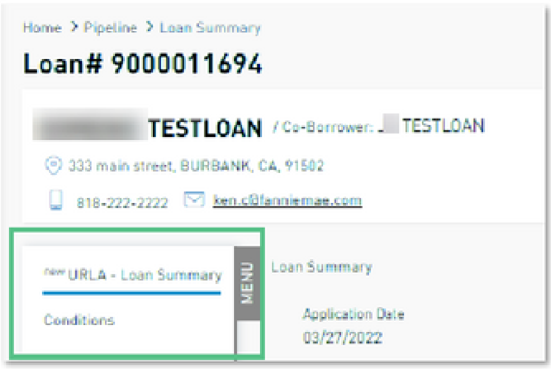


Managing the Pipeline View

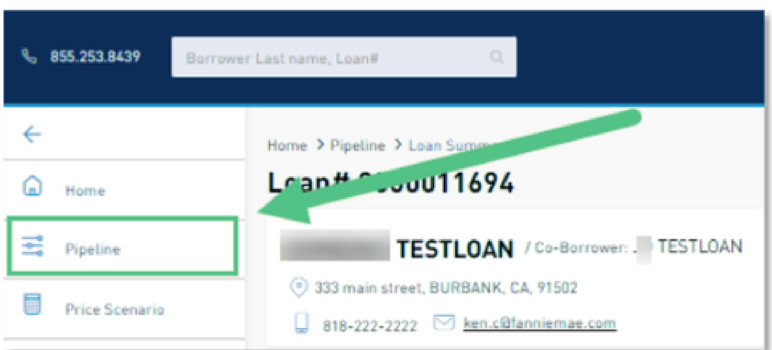
4. Search the Active Pipeline, continued

Search by Loan Number continued

4. Click the **Loan No** to access the portal **MENU** for the specific loan



5. Click **Pipeline** to return to the list of loans.

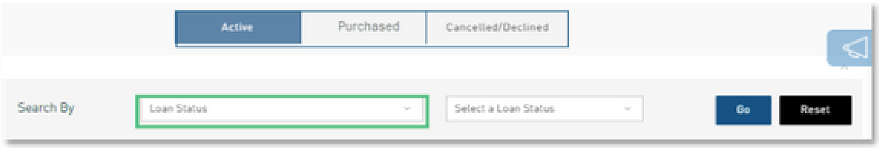


Managing the Pipeline View

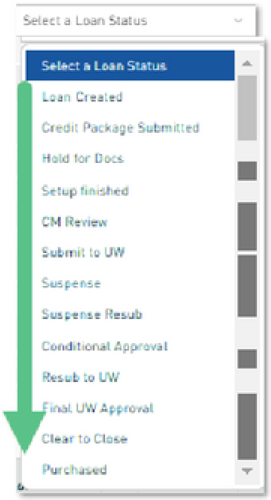
4. Search the Active Pipeline, continued

Search by Loan Status

6. Select **Loan Status** using the drop-down menu



7. Select a loan status from the available drop-down list.



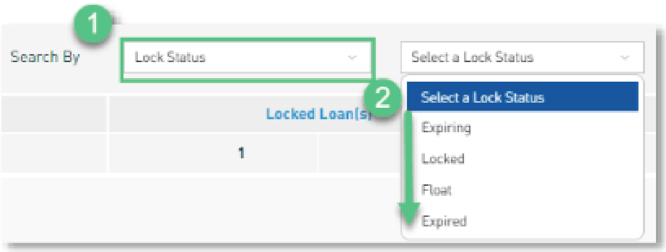
8. Click **Go**

Managing the Pipeline View

4. Search the Active Pipeline, continued

Search by Lock Status

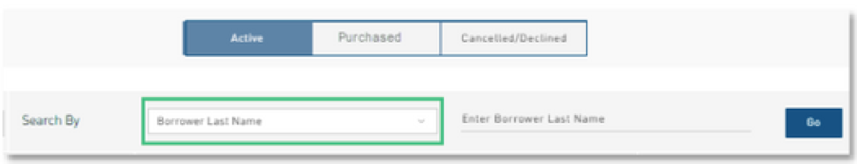
1. Select **Lock Status** using the drop-down menu.
2. Select a lock status from the available drop-down list.



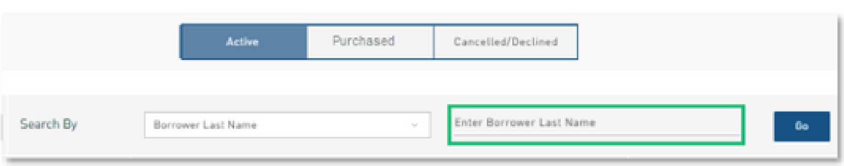
3. Click **GO**

Search by Borrower Last Name

1. Select **Borrower Last Name** using the drop-down menu

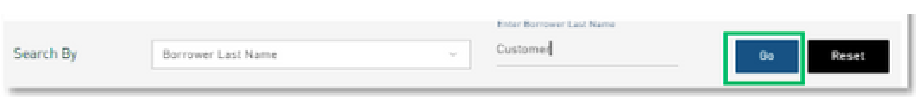


2. Enter the borrower's last name in the space provided



Note: The last name must be entered and spelled correctly

3. Click **Go**

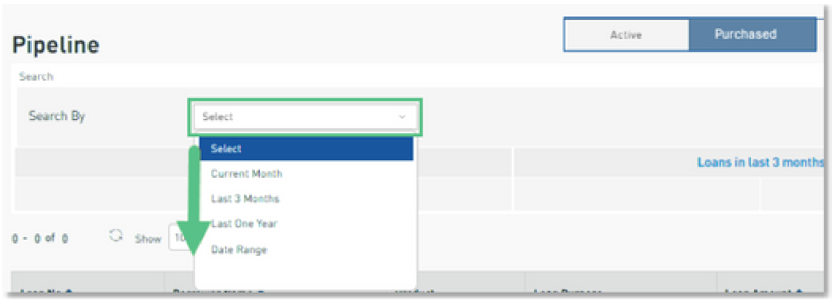


Managing the Pipeline View

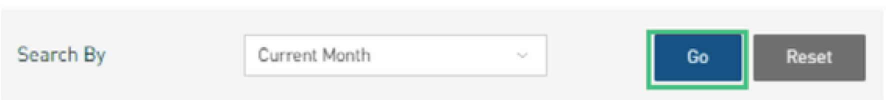
5. Other Search Options

Search the Purchased Pipeline

1. Select the date range to display from the drop-down list.



2. Click **GO**

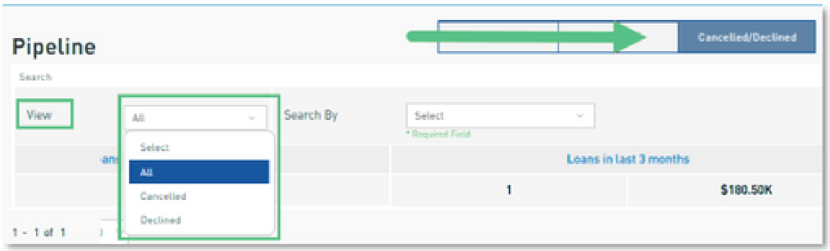


Managing the Pipeline View

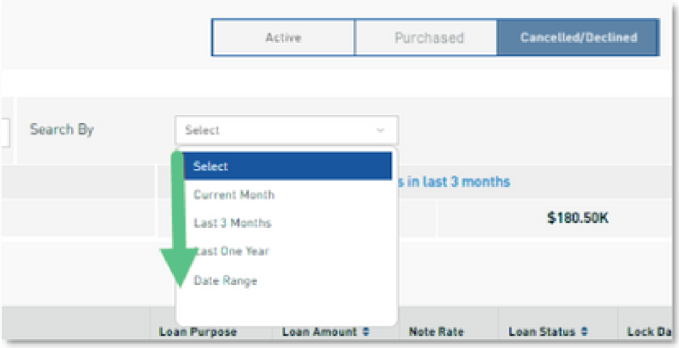
5. Other Search Options, continued

Search for Cancelled/Declined loans

1. Search for Cancelled/Declined loans



2. Select the date range to display from the **Search** by drop-down menu.



3. Click **Go**

Managing the Pipeline View

5. Other Search Options, continued

Quick Search

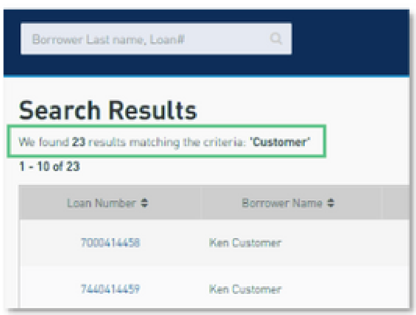
The quick search option is available at the top of the portal window. The user can quickly search by entering Borrower Last Name or Loan#

1. Enter the **Borrower Last Name** or **Loan#** in the search box.

2. Press **Enter**

Note: *The search results display the list of loans matching the criteria.*

If an exact match is found, the portal automatically opens to the **new URLA – Loan Summary** screen within the matching loan file



Managing the Pipeline View

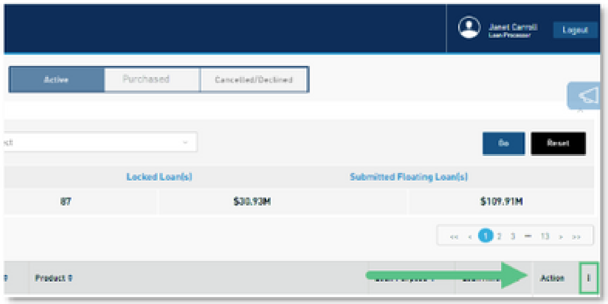
6. Customize Columns

The **Column Organizer** permits the user to add/remove columns in the Active pipeline view.

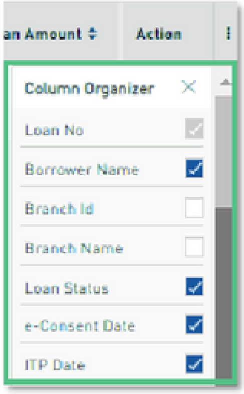
Note: The **Column Organizer** is only available in the **Active** Pipeline

The user role determines available columns

1. Click three vertical dots (⋮) next to the **Action** column

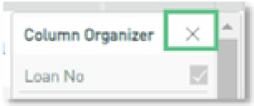


2. Select or clear the checkbox to indicate which columns to display in the Active pipeline view



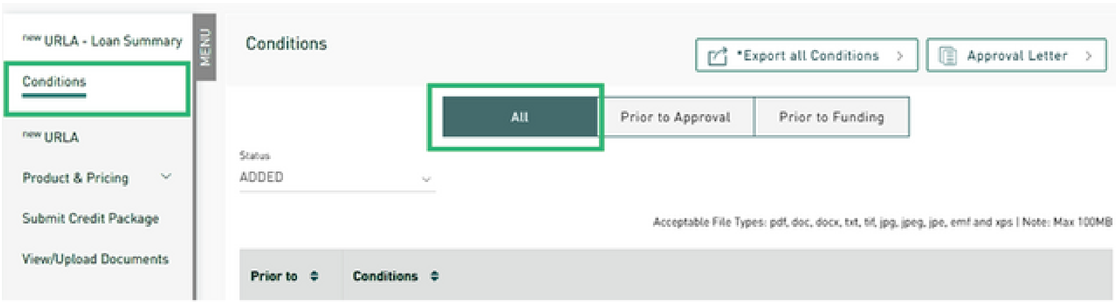
Note: Some columns are mandatory and cannot be removed from the view

3. Click the **X** to close the **Column Organizer**



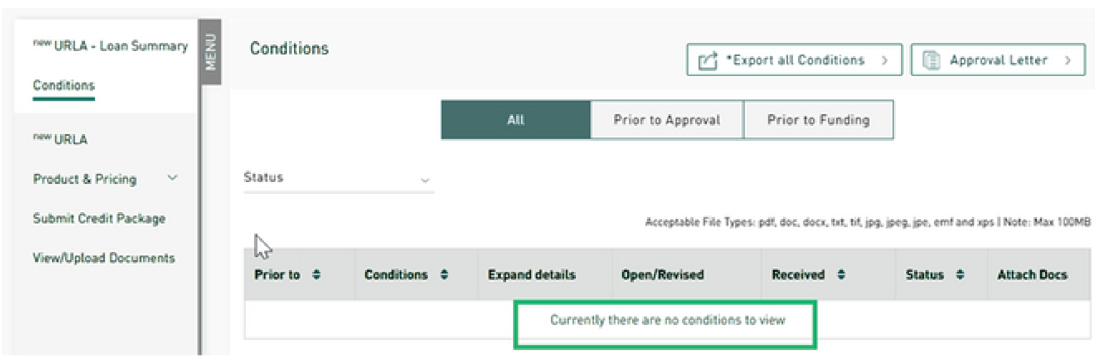
Managing the Pipeline View

Click **Conditions** to navigate to the **Conditions** dashboard.



Outcome: The **All** tab is the default view and lists all conditions regardless of the category

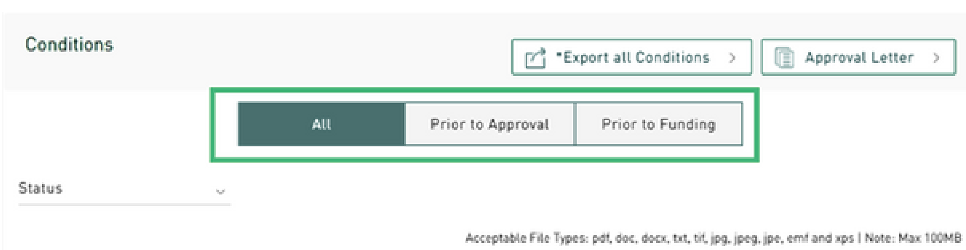
- *If no data is found, the message* ***Currently there are no conditions to view*** *displays*



Viewing Conditions

The **Conditions** dashboard features options to view by category or **Status**.

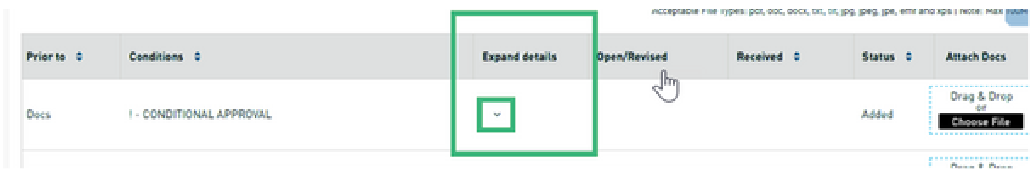
1. Select a condition category using the category bar at the top of the Conditions screen.



Managing Conditions

2. Filter the list by **Status** by selecting the appropriate status from the drop-down list

3. Click the ˅ icon for **Expand Details** to display the details of the condition.

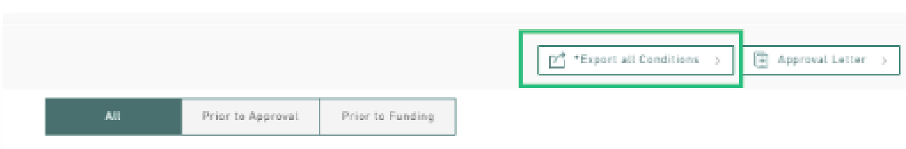


Note: If the Underwriter enters a comment supporting the condition, the comment displays under **Revision Comments** when viewing the condition details

- **Revision Comments** has a **Read More** button to view the entire comment in a separate dialogue box.

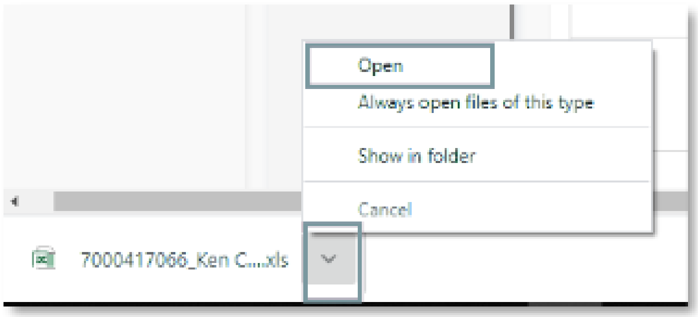
Export List of Conditions

1. To export the list of conditions to an Excel workbook, click *Export all Conditions.

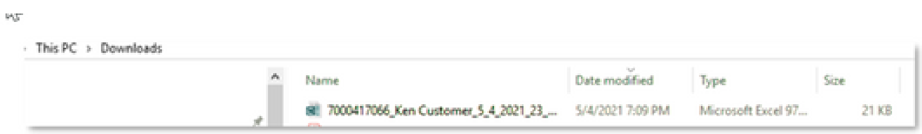


Managing Conditions

2. Click the ˅ icon. Select **Open**.

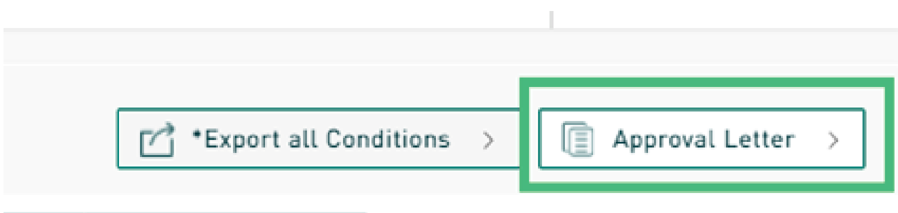


Outcome: A file opens in Excel.



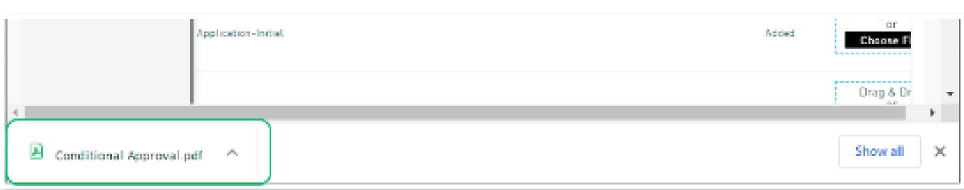
Printing Approval Letter

1. To print a Conditional Approval Letter, click **Approval Letter.**



Note: This button is enabled when the loan is in either **Conditional Approval** or **Final Approval** status.

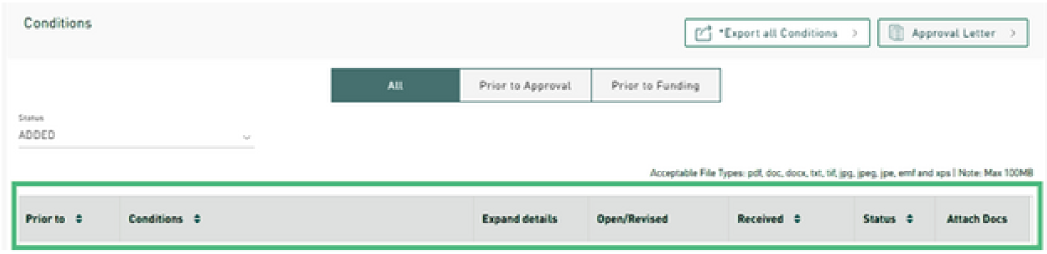
Outcome: The document appears in the lower-left corner of the page.



Managing Conditions

3. Column Headers on the Conditions Screen

The following section describes the dashboard columns when viewing the list of conditions.



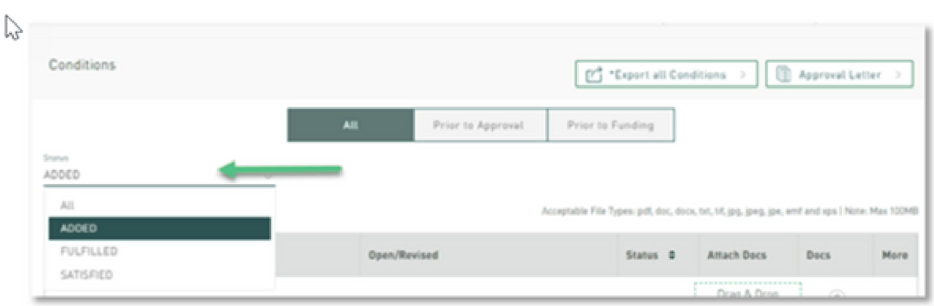
Column Heading	Purpose
Prior to	This describes the category of the condition.
Conditions	This is the name of the condition; the numerical portion is for internal use only.
Open/Revised	This is the date the condition was opened and/or revised by the Underwriter.
Received	This is the date the documents were received for review.
Status	This is the current status of the condition.
Attach Docs	This enables the user to upload documents supporting the condition.
View Docs	This displays documents uploaded.
More	This displays details of the condition, including Underwriter comments, if any.

4. Uploading Document to Clear Conditions

It is a best practice and recommended to upload one document at a time to clear one condition and click Submit on the bottom-right of the page before moving to another condition. This allows for quicker service to review and clear conditions.

1. Find the condition you want to clear.

Note: Select **ADDED** or **OPEN** from the **Status** drop-down list to view only open conditions.

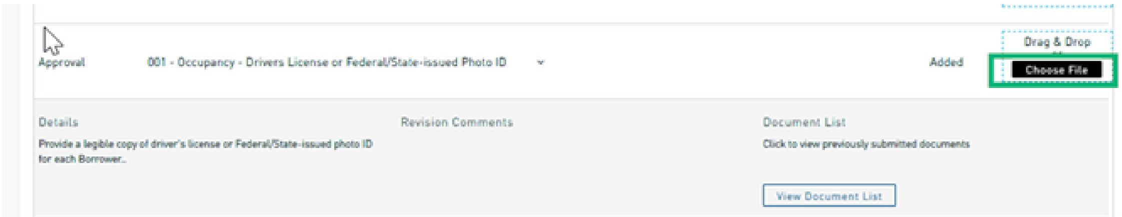


Managing Conditions

The user may browse to upload a document using Choose File or use Drag & Drop to upload a file.

Choose File

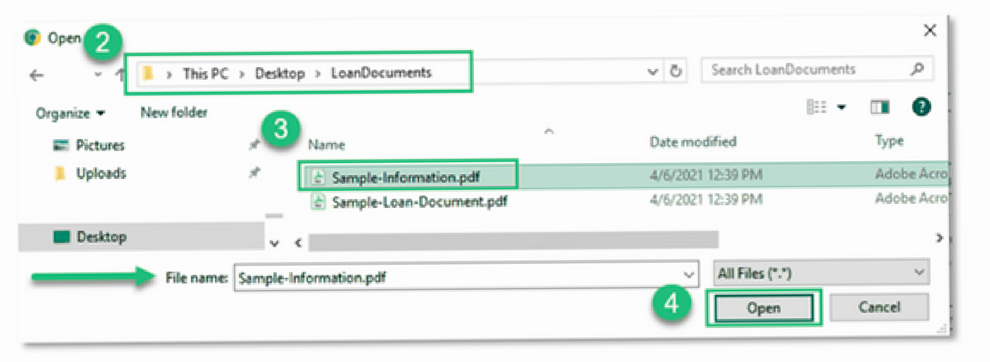
1. Click **Choose File.**



2. Navigate to the location of the document.
3. Select the document.

Note: The document name populates in the **File name:** box.

4. Click **Open** to upload the document to the portal.



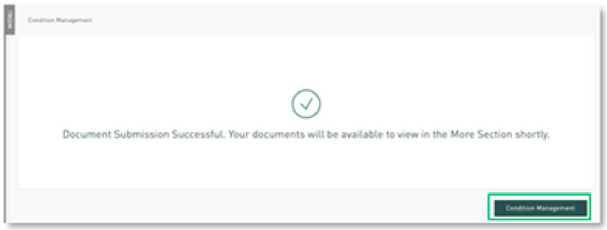
5. Click **Submit** on the bottom-right of the page to upload

Managing Conditions

Choose File, continued

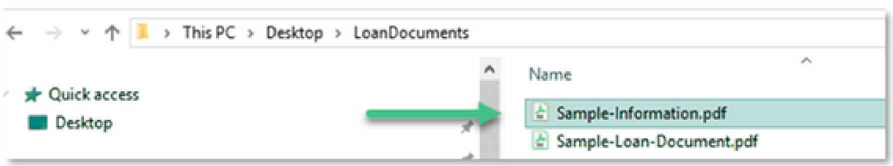
Outcome: A Document Submission Successful message displays

6. Click **View/Upload** Documents on the left nav bar

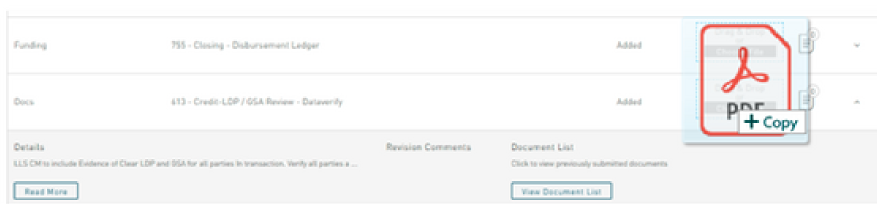


Drag & Drop

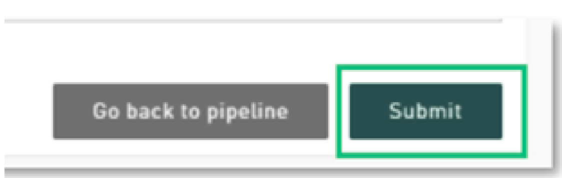
1. Navigate to the file to be uploaded for the condition.



2. Using your mouse, drag the highlighted file over the **Drag & Drop** box for the condition.



3. Click **Submit** to complete the submission of the document for review.



Managing Conditions

Drag & Drop, continued

***Outcome:* A Document Submission Successful** message displays

4. Click Condition Management to return to the Conditions screen.