INFORMATION NEEDED FOR COMPANY SETUP

COMPANY INFORMATION FOR SETUP	COMPANY INFO
Contact Name	
Company Name	
Company Street Address	
Company City, State, Zip	
Company Phone Number	
Company Fax Number	
Company Website	
Company NMLS	
Slogan	

COMPANY SET UP OPTIONS PER LOCATION

BORROWER/CO-BORROWER SSN: With this option on, the Borrower is asked to provide their SSN in the questionnaire after providing authorization to pull credit. **DEFAULT=ON**

BORROWER EMAIL NOTIFICATION: With this option on, the Borrower automatically receives an email, from you, with the default message below when they submit the questionnaire. **DEFAULT=ON**
NOTE: The Admin can change this message for each individual LO.

Loan Document Checklist

<USERNAME>

Thank you for completing the loan questionnaire. Please review the attached document checklist and start uploading those documents to me directly by clicking on the following link: <DOCCENTERLINK>

I will be in touch shortly to go over your loan options.
Thank you,
<LONAME>
<LOEMAIL>
Phone: <LOPHONE>
NMLS#: <LONMLS>

DOCUMENT CENTER: With this option on, the borrower receives the above email message with a link to Document Center to upload documents to your directly. **DEFAULT=ON**

BORROWER EMAILED CHECKLIST: With this option on, the Borrower automatically receives their Document Checklist attached to the email above. **DEFAULT=ON**

LO RECEIVES CHECKLIST AND SUMMARY: With this option on, the LO receives the Checklist and Questionnaire Summary in their completed email notification. **DEFAULT=ON**

EDITABLE DOCUMENT CHECKLIST: The LO can receive their checklist in an editable Word document or PDF document. NOTE: Open the checklist in a word compatible program- it may look distorted opening in a browser. **DEFAULT=WORD**

RECEIVE 3.2 FILE: With this option on, the LO receives the Fannie Mae 3.2 file in their completed email notification. **DEFAULT=ON**

3.2 FILE IN CAPS: With this option on, the Fannie Mae 3.2 file is populated in all CAPITALS and will import into your LOS in all CAPITALS. **DEFAULT=OFF**

CHECKLIST: A customized opening statement or paragraph can be added as a default to the beginning of the borrower's Document Checklist. **DEFAULT=BLANK** Please provide the verbiage.

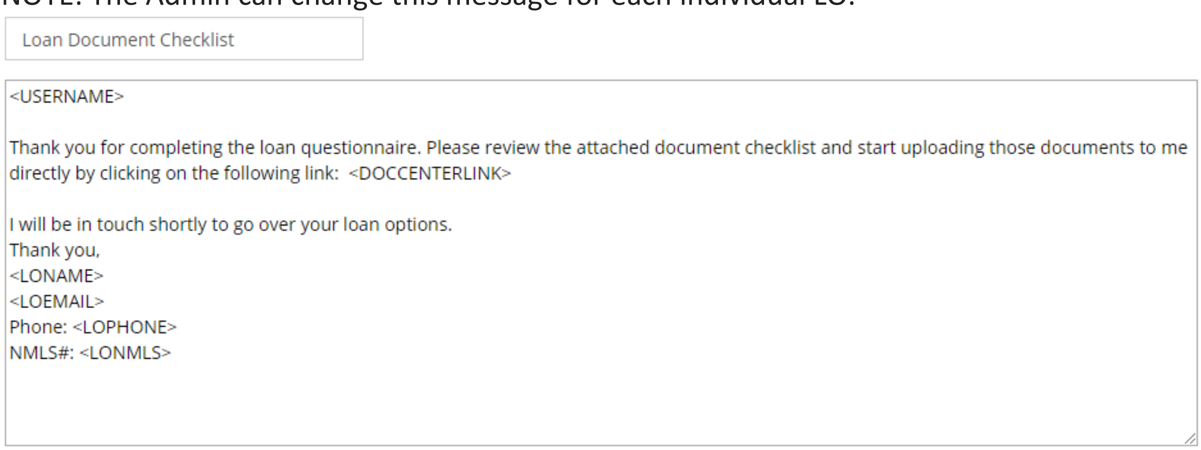
CHECKLIST: A customized closing statement or paragraph can be added to the end of the borrower's Document Checklist (i.e. Do's & Don'ts, reminders, etc.) **DEFAULT=BLANK** Please provide the verbiage.

ADMIN OPTIONS PER LO

As an admin, you can click on "Manage Users" at the top right of your dashboard. Then click on "Edit" next to the Loan Originator that you want to make changes to. Below are explanations of the tab names and the functions they provide. NOTE: The changes made are for each individual LO.

Information Tab: This is where you would update the LO's contact information which shows up on the header on their page. NOTE: The "Email" in this tab is also the email that the user will log into their dashboard with and where they will receive their started and completed notifications. When you are done making changes, click "Save" in upper right corner.

Customized Email Tab: When this option is turned on, the Borrower automatically receives an email, from the LO, with the default message below when they submit their questionnaire. If this option is turned off, the information in the tab will be blank and you will not be able to check the box next to "Customize Email". Send us an email and we can turn it on for you. When you are done making changes, click "Save" in upper right corner.
NOTE: The Admin can change this message for each individual LO.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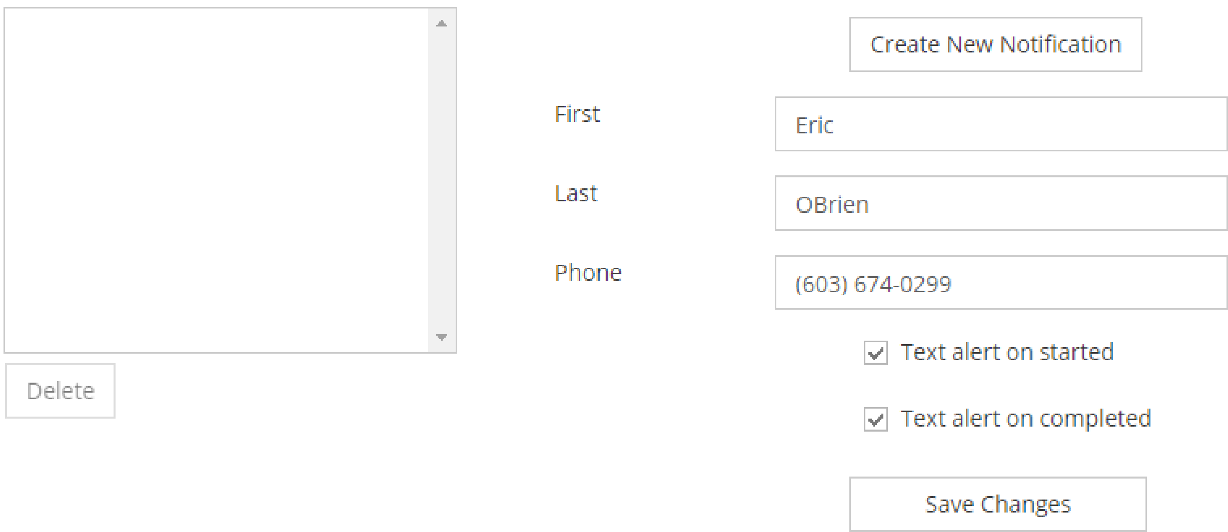
Thank you,
<LONAME>
<LOEMAIL>
Phone: <LOPHONE>
NMLS#: <LONMLS>

Options Tab: The admin can assign an Admin by checking that box. They can disable a LO by checking that box. They can hide a LO from the public list which is a URL with all your LO listed with their borrower links for a borrower to choose who they want to work with.

SMS Options Tab: The admin can click “Create New Notification” and enter a First and Last name along with a number that can receive text messages. They can then choose to check the box next to the text notifications they would like to receive “started” and/or “completed”. NOTE: If it doesn’t allow you to “Save Changes”, remove the last number off the phone number and type it again and you will be able to then click “Save Changes”. When you are done making changes, click “Save” in upper right corner.



Email Options Tab: The admin can type an email into the “Email Address” field and then click “Add Email Address” to have people copied on the started and completed email notifications (Managers, Processors, LOA’s, etc…). An email can be added as a cc or bcc by adding it to the proper field. When you are done making changes, click “Save” in upper right corner.