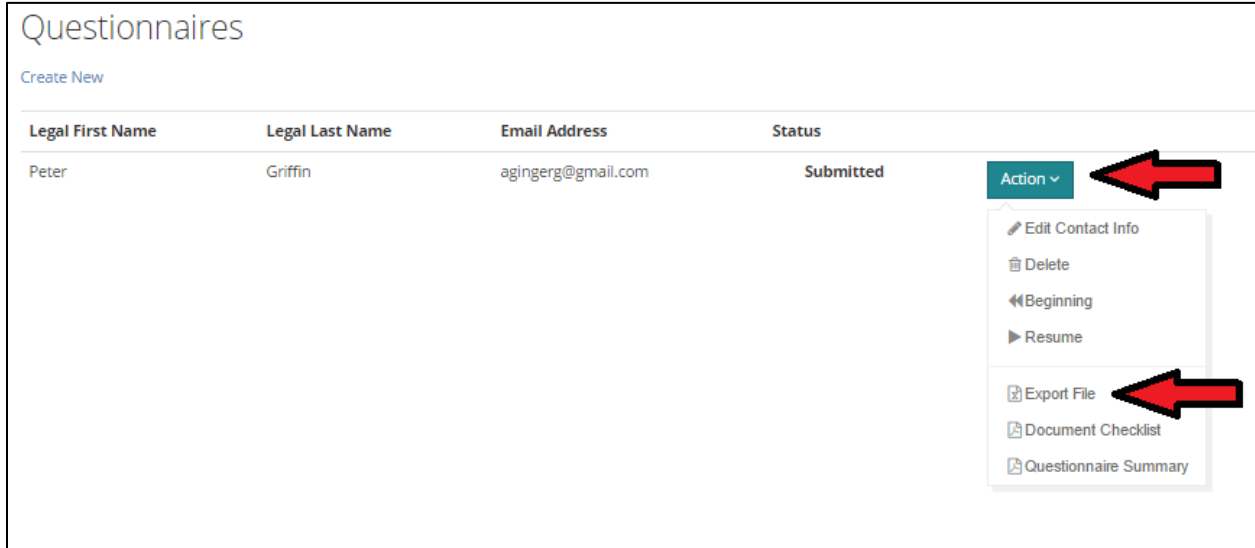


EXPORTING A FILE FROM YOUR PERFECTLO DASHBOARD AND IMPORTING INTO CALYX

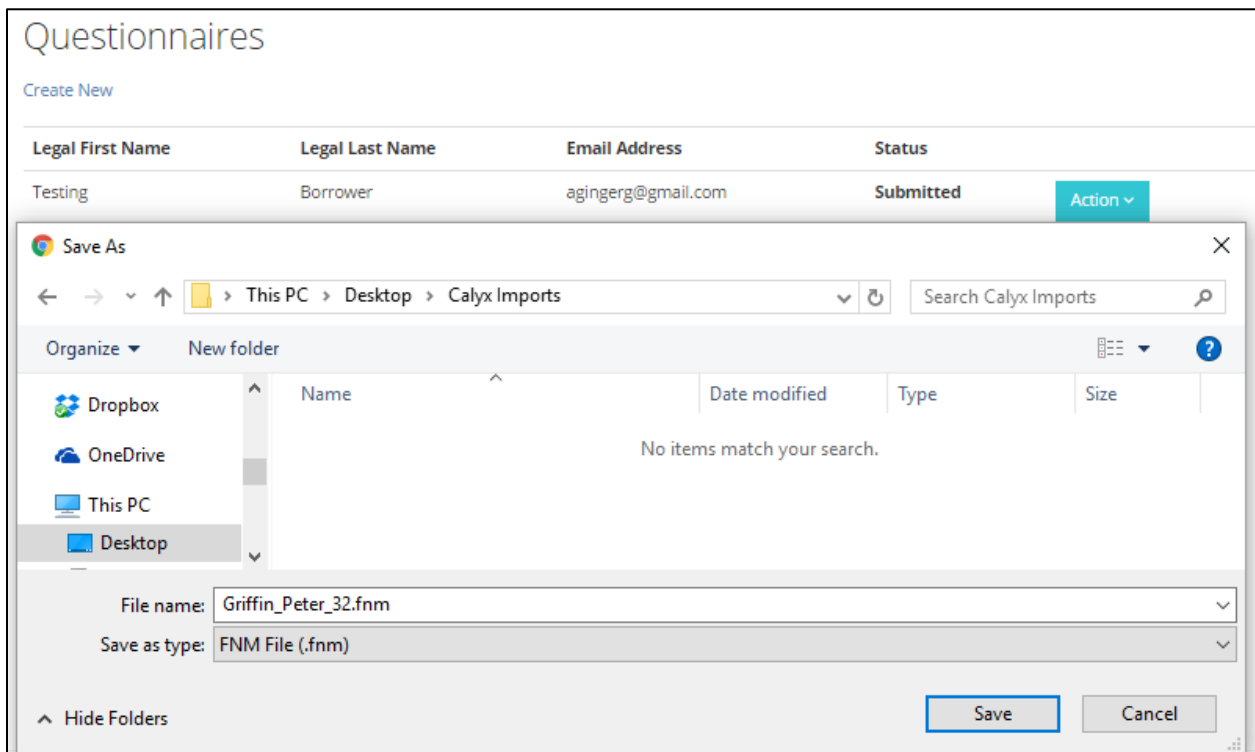
1. You may Export your borrowers questionnaire to a Fannie Mae (.fnn) file by finding their name on your dashboard and clicking on the **"Action"** button. In the drop down menu, click on **"Export File"**



The screenshot shows the 'Questionnaires' dashboard with a table of borrower information. The table has columns for Legal First Name, Legal Last Name, Email Address, and Status. A red arrow points to the 'Action' dropdown menu for the first row, which is open, showing options like 'Edit Contact Info', 'Delete', 'Beginning', 'Resume', 'Export File', 'Document Checklist', and 'Questionnaire Summary'. Another red arrow points to the 'Export File' option.

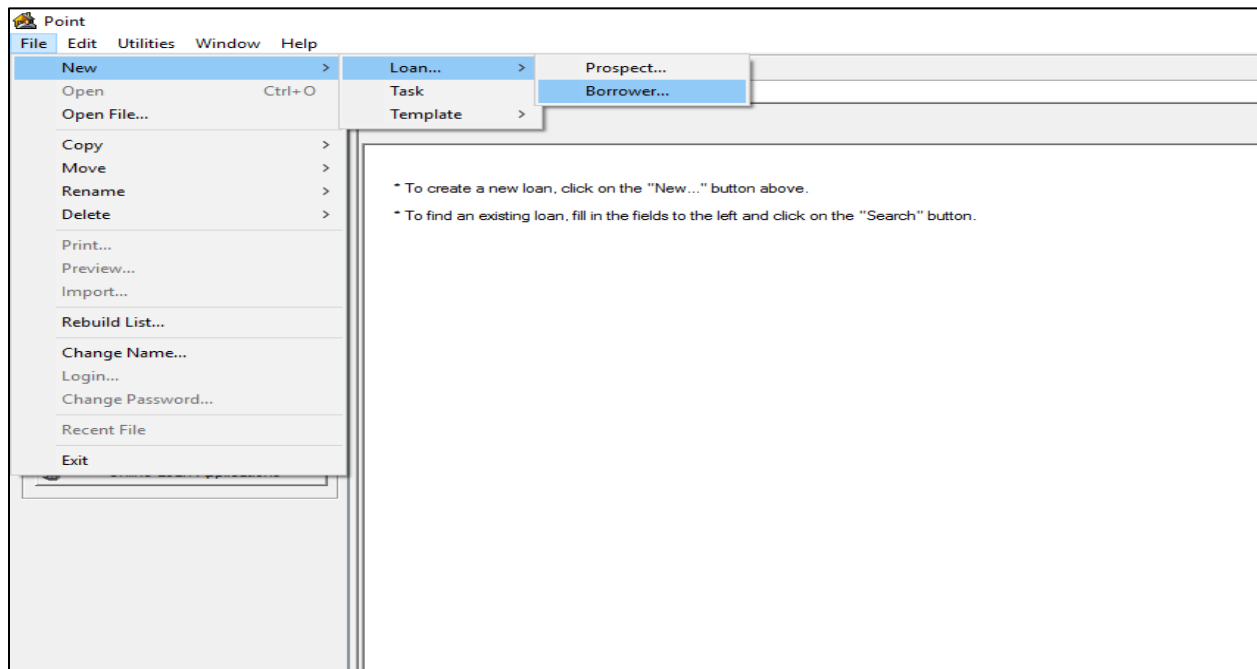
Legal First Name	Legal Last Name	Email Address	Status
Peter	Griffin	agingerg@gmail.com	Submitted

2. Choose the location to save your file (You can save to any location that you wish but it is important to remember the location of where you saved the file). Change the **"File Name"** to your borrower name by clicking on **"PerfectLO"** and typing in the name you want to save the file as. Click **"Save"** and then close the download window once the file transfer is complete.

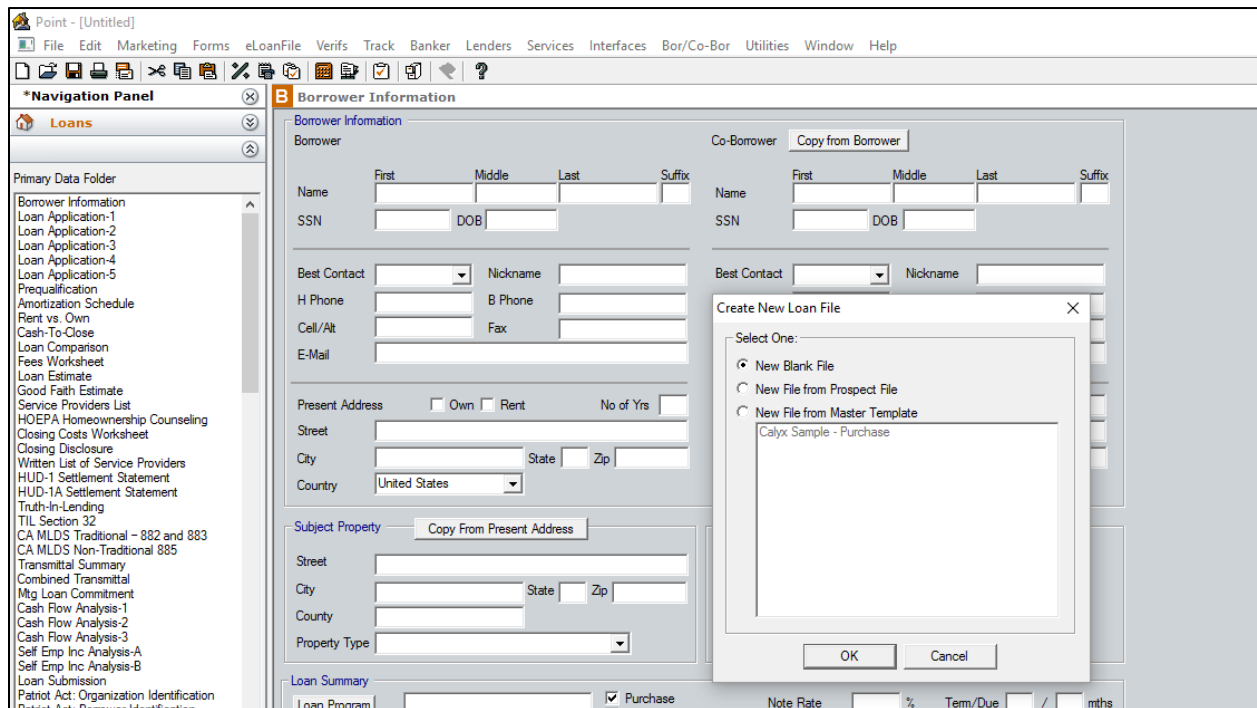


The screenshot shows a 'Save As' dialog box. The file name is 'Griffin_Peter_32.fnn' and the save as type is 'FNM File (.fnn)'. The save location is 'Calyx Imports' on the Desktop. The dialog box also shows a list of folders on the left and a search bar at the top.

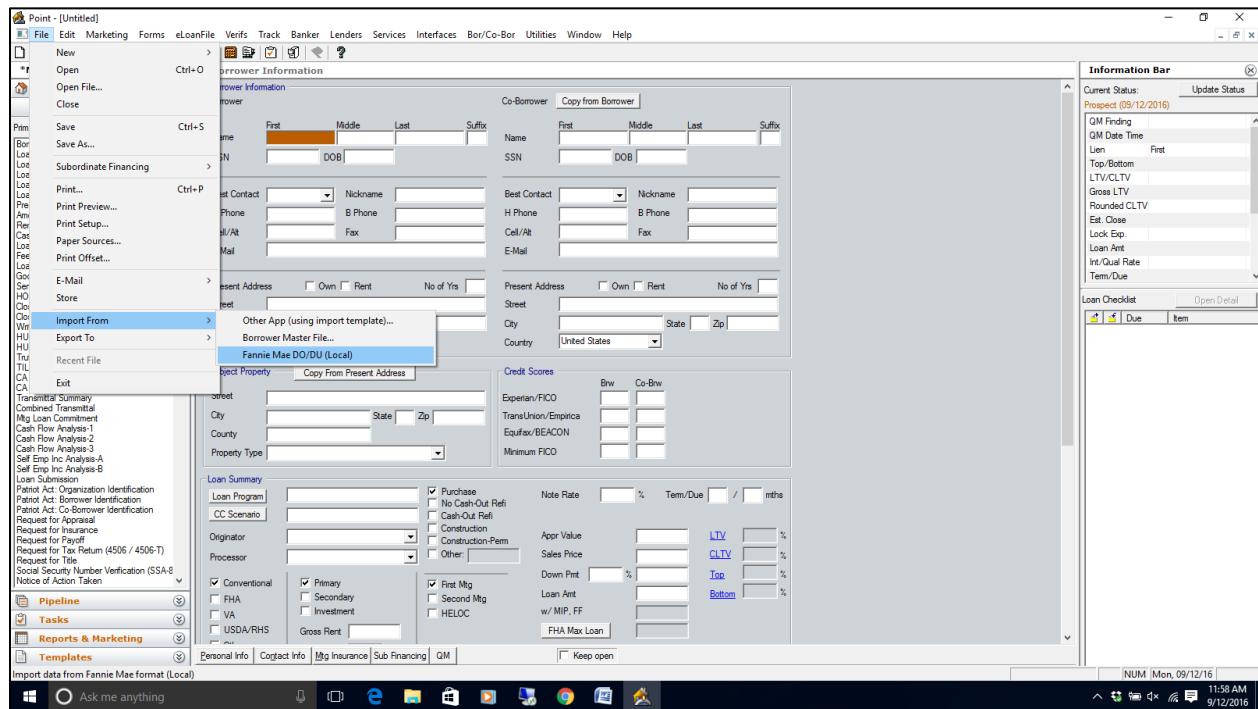
3. Start Calyx. Once running Calyx, click on **"File"** at the top in the menu bar. Then highlight the arrow on **"New"**, then **"Loan..."**, then click on **"Borrower"**.



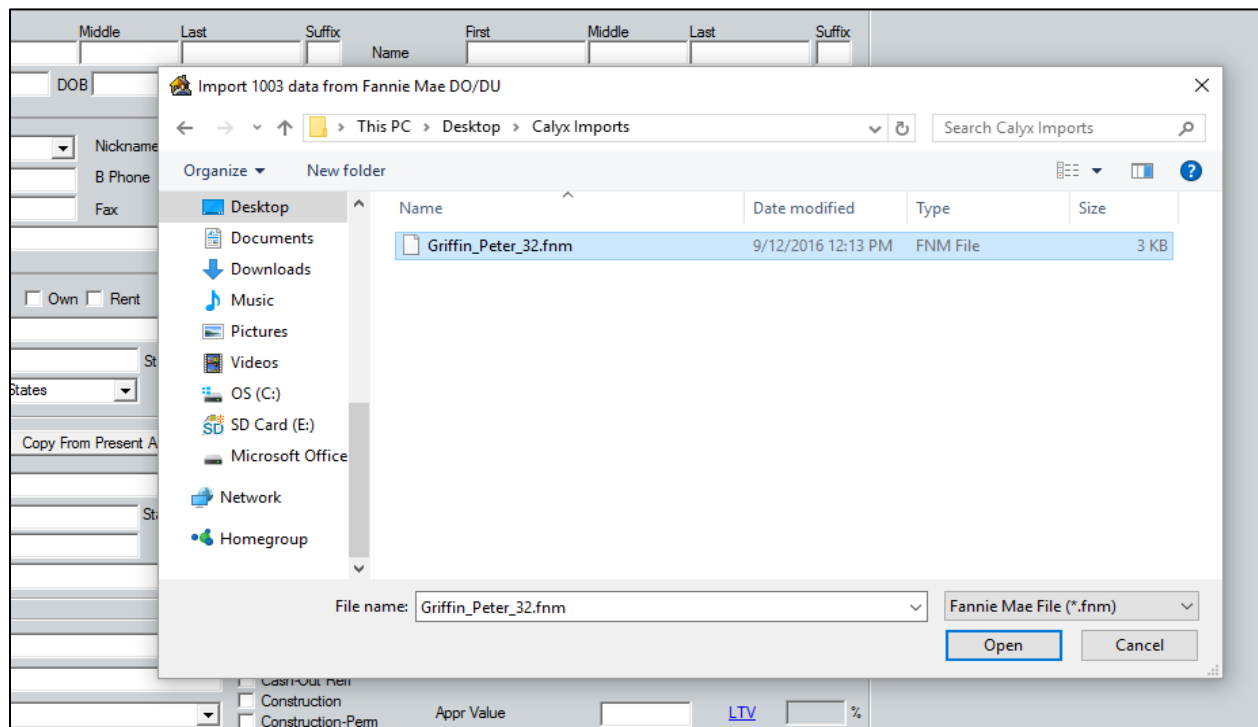
4. Click on **"New Blank File"** and then click **"OK"**.



5. Click on **"File"** in the menu bar and highlight **"Import From"** and then click on **"Fannie Mae DO/DO (Local)"**




6. Find the location that you saved the Fannie Mae (.fnn) file to, highlight the file and click **"Open"** at the bottom of the window to start the import.



7. Once the file is done importing, click "**OK**" to continue and work on it as usual.

Borrower Information					Co-Borrower				
Borrower					Co-Borrower Copy from Borrower				
Name	First	Middle	Last	Suffix	Name	First	Middle	Last	Suffix
	Peter		Griffin			Jane		Doe	
SSN	000-00-0000	DOB	01/01/1983		SSN		DOB	03/03/1980	
Best Contact Nickname 					Best Contact Nickname 				
H Phone	603-568-5244	B Phone			H Phone	333-333-3333	B Phone		
Cell/Alt		Fax			Cell/Alt		Fax		
E-Mail	agingerg@gmail.com				E-Mail	iane@doe.net			
Present Address <input checked="" type="checkbox"/> Own <input type="checkbox"/> Rent No of Yrs 2.08					Present Address <input checked="" type="checkbox"/> Own <input type="checkbox"/> Rent No of Yrs 2.08				
Street 25 Main St.					Street 				
City Keene State NE Zip 09958					City State Zip 				
Country United States					Country 				
Subject Property Copy From Present Address					Create 				
Street 					Expected 				
City State Zip 					TransUnion/Empirica 				
County 					Equifax/BEACON 				
Property Type 					Minimum FICO 				
Loan Summary					Note Rate % Term/Due 240 / 240 mths				
Loan Program 					Appr Value LTV %				
CC Scenario 					Sales Price CLTV %				
Originator 					Down Pmt % Top %				
Processor 					Loan Amt 380,000 Bottom %				
<input checked="" type="checkbox"/> Conventional <input checked="" type="checkbox"/> Primary <input checked="" type="checkbox"/> First Mtg <input type="checkbox"/> FHA <input type="checkbox"/> Secondary <input type="checkbox"/> Second Mtg <input type="checkbox"/> VA <input type="checkbox"/> Investment <input type="checkbox"/> HELOC <input type="checkbox"/> USDA/RHS Gross Rent 					<input type="checkbox"/> Purchase <input checked="" type="checkbox"/> No Cash-Out Refi <input type="checkbox"/> Cash-Out Refi <input type="checkbox"/> Construction <input type="checkbox"/> Construction-Perm <input type="checkbox"/> Other: 				
FHA Max Loan 					w/ MIP, FF 380,000				
Personal Info					Contact Info				
Mtg Insurance					Sub Financing				
QM					<input type="checkbox"/> Keep open				

Imported from Fannie Mae

 Imported 1003 data from Fannie Mae

OK