SYNCING LOAN DATA BETWEEN BESMARTEE AND LENDINGQB (BSM ⇔ LQB)

OVERVIEW

Described below is the synchronization behavior of BeSmartee (BSM) to/from LendingQB (LQB). Depending on the situation you will want to either push data from BSM to LQB or vice versa.



Clicking this icon will pull loan data from LQB and overwrite BSM data. Do not use this function if you've made edits in BSM that you want to get into LQB.



This button will push data from BSM into LQB and overwrite the data in LQB.

NOTE: BSM and LQB will sync automatically on a regular basis. Best practice is to work in one or the other.



FULL DETAILS

Login URL: https://app.greenwaymortgage.com/lender/login/9RQ1UYRE

When working in BSM if you ever need to sync the system with LQB there are two ways to do this, depending on which direction you want to sync.

First start by logging into the BSM portal and choosing the appropriate loan.

Once in the loan it should look something like Image A. below. You will want to be under the *Application* section and *General* tab, marked by stars in the image.

*** If you have any questions or concerns please reach out to BSMAdmin@greenwaylending.com ***

Image	Α.
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	A G E Pipeline	Create Loan 👻 Pricin	g Resourc	es Admin -	Fickets			Hi Rachel! 🚽
Messages © Co-Browsing	Loan # LEAD1903 Borrower Alice Firsti Subject TBD Avenel, NJ	178 • P mer P 07001	rogram Conv urpose Purch batus Proce	rentional hase essing	Occ. Loan Rate APR	Primary residence \$254,200.00 n/a n/a	FICO LTV CLTV HCLTV BackEnd DTI	0 82.000% 82.000% 16.395%
Application \$ Fees & Service	General General	Property Income Exp	enses Assets	5 Liabilities/REO	Transaction	Declarations	Monitoring	C 4
Providers	Lender Loan #	LEAD1903178		Purpose	Pu	rchase		\checkmark
Product & Pricing	Application Submitted Date	03/28/2019		Require Impounds	0 N	lo 🖲 Yes		
\$	CFPB Application Date 🔞			Application Ty	Ap	plication Only		\checkmark
AUS	Campaign	Full Application without ID		Loan assist	Cor	nsumer Self Serve		
Ø	Signup Link (Source)	https://app.greenwaymortgag campaign=fulb:	e.com/app/signup	Est. Close Dat /p/greenwaymortgage/to	e 4/2 arvelli?	5/2019		

Within this section you will see two icons in the right-hand corner, as shown in image 2.

Image 2.



If you are looking to sync the BSM file FROM LQB, aka pull in information that was added only to LQB, then click the

rotating arrows option, This will allow BSM to pull in information from the corresponding LQB loan file.

*** If you have any questions or concerns please reach out to <u>BSMAdmin@greenwaylending.com</u> ***

Sync loan data from LQB



Click the Sync button below to sync loan data from LQB.



If instead you want to send the information on the file from BSM TO LQB, then you will want to click on the second

option "Push loan update to LQB" represented by the line and arrow icon,

Push Loan Update to LQB

Click to push this loan update into LQB.





Both options will have popups to confirm the action you choose but once you click **Sync** or **Push** the data will be shared between BSM & LQB.