

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.

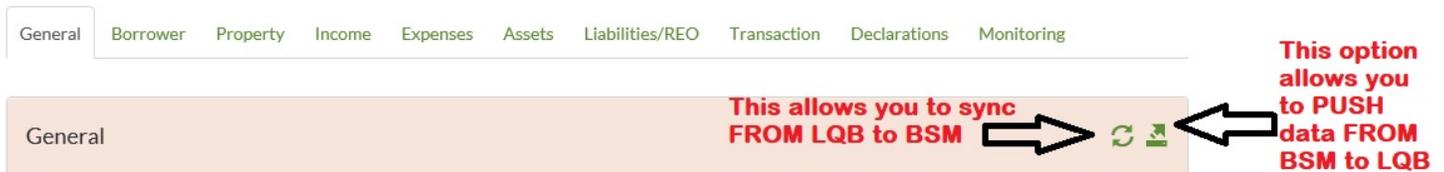


Clicking this icon will pull loan data from LQB and overwrite BSM data. Do not use this function if you've made edits in BSM that you want to get into LQB.



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 A.

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.

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Sync loan data from LQB



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



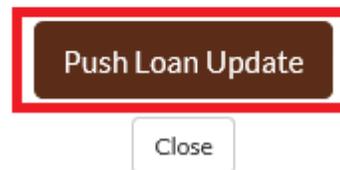
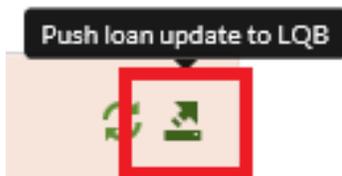
If instead you want to send the information on the file from BSM **TO** LQB, then you will want to click on the second

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.

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