

# BSM How To: Finicity VOA Refresh

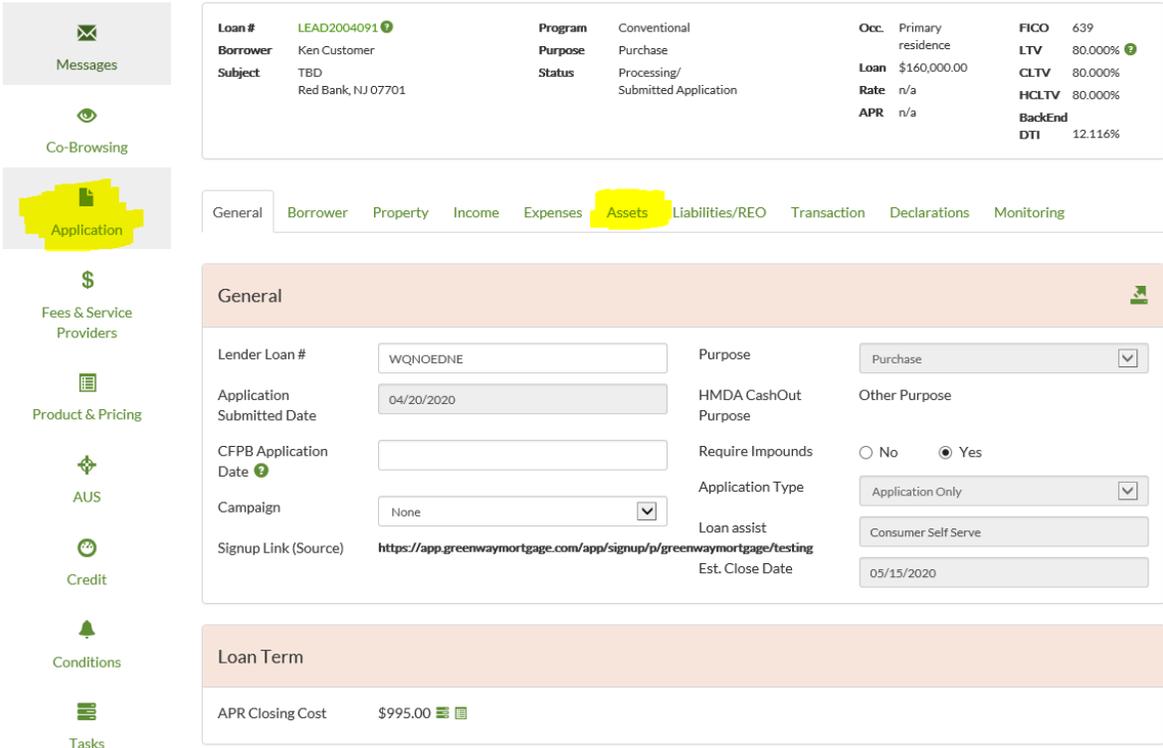
### Overview:

If you need to refresh the VOA on a borrower, you can do so within the BSM portal. Simply go into the file under the Assets tab where you will find the section **Asset Reports**. From there you click the pencil

edit icon and a button will appear for you to select,  .

**Note:** Finicity allows for unlimited refreshes for 60 days.

1. Open the file in question, you will want to be in the Application portion, and go into the Assets tab, as seen below.



The screenshot shows the BSM portal interface. On the left is a navigation sidebar with icons for Messages, Co-Browsing, Application (highlighted in yellow), Fees & Service Providers, Product & Pricing, AUS, Credit, Conditions, and Tasks. The main content area is divided into a top summary section and a detailed 'General' section. The top summary section displays loan details: Loan # LEAD2004091, Borrower Ken Customer, Subject TBD, Program Conventional, Purpose Purchase, Status Processing/Submitted Application, Occ. Primary residence, Loan \$160,000.00, Rate n/a, APR n/a, FICO 639, LTV 80.000%, CLTV 80.000%, HCLTV 80.000%, and BackEnd DTI 12.116%. Below this is a horizontal tab bar with 'Assets' highlighted in yellow. The 'General' section contains various input fields and dropdown menus: Lender Loan # (WQNOEDNE), Application Submitted Date (04/20/2020), CFPB Application Date, Campaign (None), Signup Link (Source) (https://app.greenwaymortgage.com/app/signup/p/greenwaymortgage/testing), Purpose (Purchase), HMDA CashOut Purpose, Require Impounds (No/Yes), Application Type (Application Only), Loan assist (Consumer Self Serve), and Est. Close Date (05/15/2020). Below the 'General' section is a 'Loan Term' section with a table showing APR Closing Cost of \$995.00.

Loan #	LEAD2004091	Program	Conventional	Occ.	Primary residence	FICO	639
Borrower	Ken Customer	Purpose	Purchase	Loan	\$160,000.00	LTV	80.000%
Subject	TBD	Status	Processing/ Submitted Application	Rate	n/a	CLTV	80.000%
	Red Bank, NJ 07701			APR	n/a	HCLTV	80.000%
						BackEnd DTI	12.116%

APR Closing Cost		\$995.00
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If you have any questions or concerns, please reach out to [BSMAdmin@greenwaylending.com](mailto:BSMAdmin@greenwaylending.com)

- Under header “Asset Reports” you will find the VOA, to the right there is column “Actions” where you will find the pencil icon to edit. Click this and details will populate on said VOA.

The screenshot shows a sidebar on the left with navigation options: Messages, Co-Browsing, Application (highlighted), Fees & Service Providers, Product & Pricing, AUS, Credit, and Conditions. The main content area has a top navigation bar with tabs: General, Borrower, Property, Income, Expenses, Assets (highlighted), Liabilities/REO, Transaction, Declarations, and Monitoring. Below the tabs, there are two sections: 'Assets' (showing 'No assets provided') and 'Asset Reports'. The 'Asset Reports' section contains a table with one entry:

Date	Borrower's Name	VOA Vendor	Reference #	Actions
4/19/2020 @ 8:00:00 pm	Ken Customer	Finicity	6fd6ys4jinih	

At the top of the page, there is a summary of loan details:

<b>Loan #</b>	LEAD2004091	<b>Program</b>	Conventional	<b>Occ.</b>	Primary residence	<b>FICO</b>	639
<b>Borrower</b>	Ken Customer	<b>Purpose</b>	Purchase	<b>Loan</b>	\$160,000.00	<b>LTV</b>	80.000%
<b>Subject</b>	TBD Red Bank, NJ 07701	<b>Status</b>	Processing/ Submitted Application	<b>Rate</b>	n/a	<b>CLTV</b>	80.000%
				<b>APR</b>	n/a	<b>BackEnd DTI</b>	12.116%

- This detailed outline of the items included on the report is where you can exclude items if need be, but this is also where you can refresh the report. As highlighted below, there is a “Re-generate Asset Report” button at the bottom, click this and you can refresh the report on hand.

The screenshot shows the 'Asset Reports' section with a table of accounts and a 'Re-generate Asset Report' button. The table has the following data:

Institution	Accounts	Exclude?
FinBank Profiles - A	Savings (XX2222)	<input type="checkbox"/> Yes
FinBank Profiles - A	IRA (XX2020)	<input type="checkbox"/> Yes
FinBank Profiles - A	401K (XX2121)	<input type="checkbox"/> Yes

Below the table is a button labeled "Re-generate Asset Report".

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