

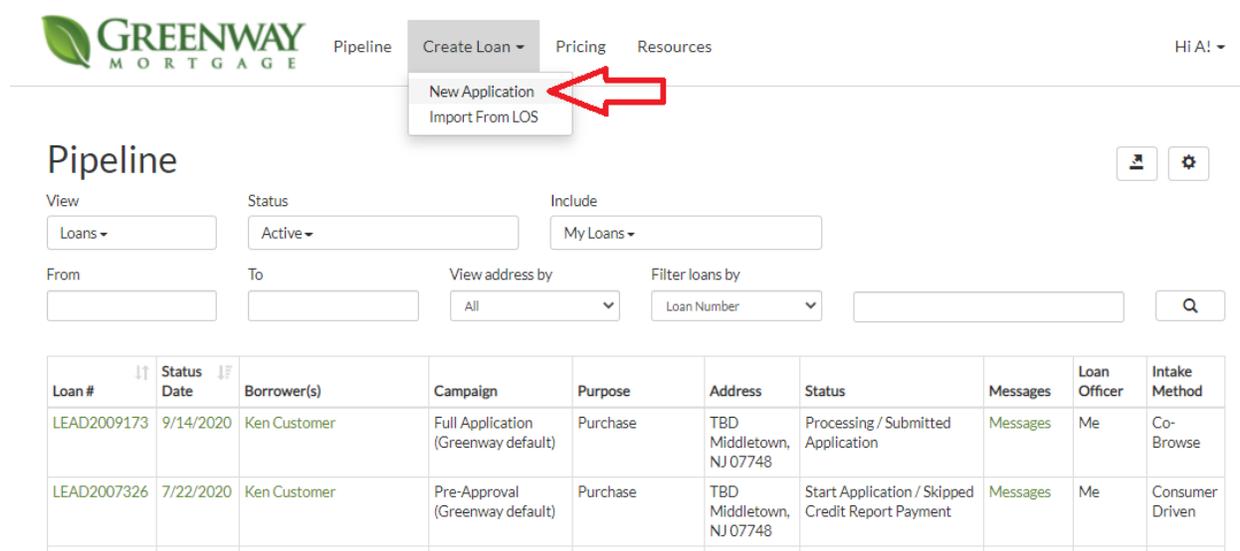
How to Create a Manual App

Overview:

If you would like to start the app for a borrower or complete their full 1003 data for them, this can be done through the BSM portal. By doing so here you can have the borrower either finish entering their information or simply provide them access at the end to upload documents themselves. By choosing the **New Application** under the create loan drop down you can get them started on the process.

Instructions:

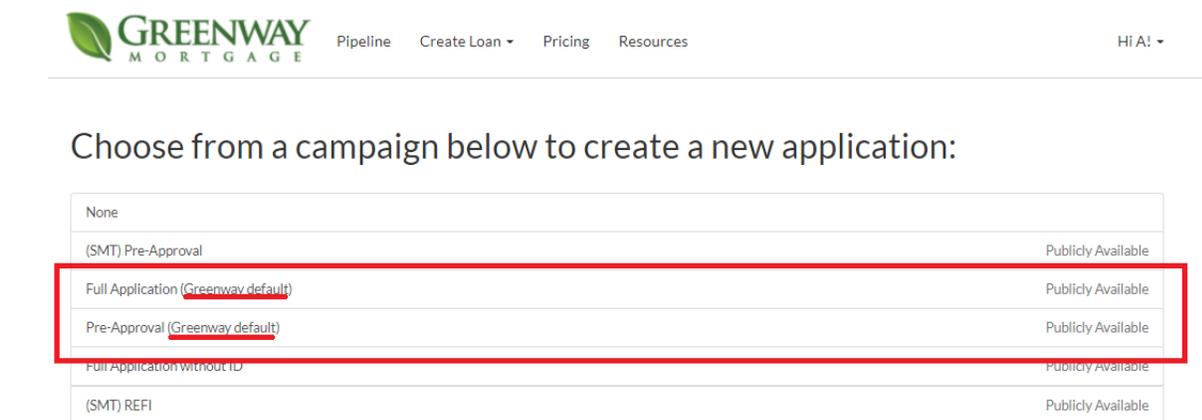
1. Locate the menu option “Create Loan” on the top bar, click to see the drop-down options and select **New Application**.



The screenshot shows the Greenway Mortgage BSM portal interface. At the top, there is a navigation bar with the Greenway Mortgage logo, 'Pipeline', 'Create Loan', 'Pricing', and 'Resources'. A dropdown menu is open under 'Create Loan', showing 'New Application' (highlighted with a red arrow) and 'Import From LOS'. Below the navigation bar, there is a 'Pipeline' section with filters for 'View' (Loans), 'Status' (Active), and 'Include' (My Loans). There are also fields for 'From', 'To', 'View address by' (All), and 'Filter loans by' (Loan Number). Below the filters is a table of loan records.

Loan #	Status Date	Borrower(s)	Campaign	Purpose	Address	Status	Messages	Loan Officer	Intake Method
LEAD2009173	9/14/2020	Ken Customer	Full Application (Greenway default)	Purchase	TBD Middletown, NJ 07748	Processing / Submitted Application	Messages	Me	Co-Browse
LEAD2007326	7/22/2020	Ken Customer	Pre-Approval (Greenway default)	Purchase	TBD Middletown, NJ 07748	Start Application / Skipped Credit Report Payment	Messages	Me	Consumer Driven

2. You will be redirected to a screen with multiple campaign options, look for the “Greenway Default” choices and decide what option is best for your borrower.
 - a. *Full Application (Greenway default)* – manual credit run
 - b. *Pre-Approval (Greenway default)* – Automatically runs borrower soft pull credit

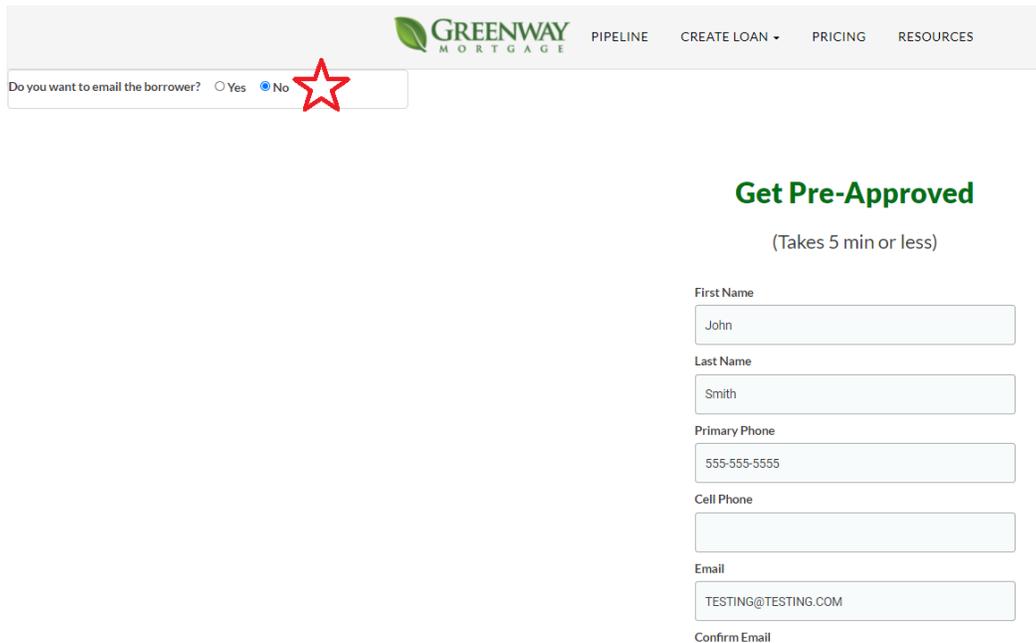


The screenshot shows the Greenway Mortgage BSM portal interface. At the top, there is a navigation bar with the Greenway Mortgage logo, 'Pipeline', 'Create Loan', 'Pricing', and 'Resources'. Below the navigation bar, there is a section titled 'Choose from a campaign below to create a new application:'. This section contains a table of campaign options.

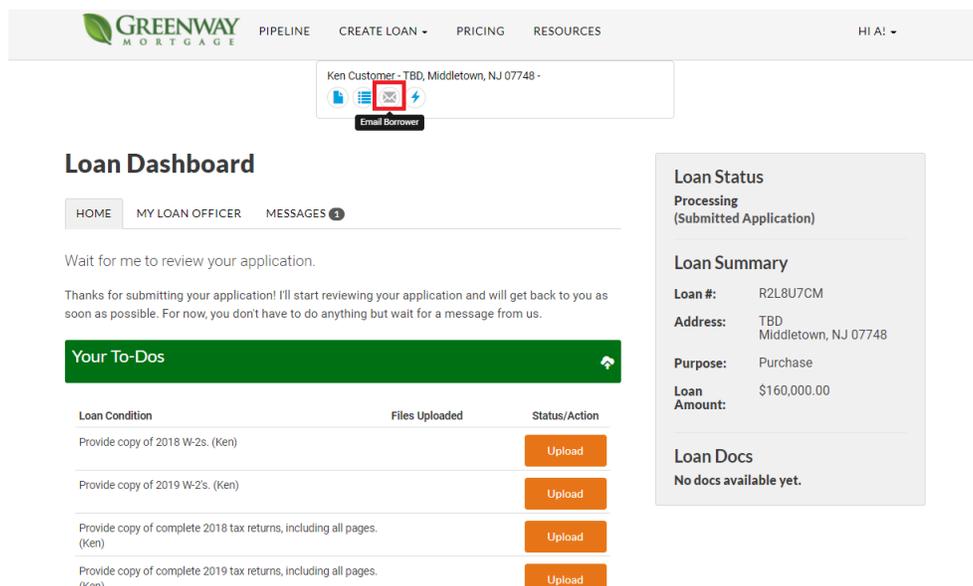
None	
(SMT) Pre-Approval	Publicly Available
Full Application (Greenway default)	Publicly Available
Pre-Approval (Greenway default)	Publicly Available
Full Application without ID	Publicly Available
(SMT) REFI	Publicly Available

For any questions or concerns please reach out to BSMAdmin@greenwaylending.com

- You will then be redirected to the application. Note in the left-hand corner there is an option to send borrower emails or not. This will default to NO you can change this to yes before entering their data and creating their account. From here you can enter their full 1003 data yourself skipping the steps that need to be done strictly by the borrower.
 - For good practice, if you want the borrower to be able to upload documents to the conditions screen select the Yes radio option.



- If you go through the entire app for the borrower you will be redirected to the Loan Dashboard, as seen below, after hitting the Submit button. This is the screen where the borrowers can upload documents. This is also when the option will come up to email the borrower. Click the envelop button indicated by the red box. To get into your view just click the first icon,  .



Ken Customer - TBD, Middletown, NJ 07748

Loan Dashboard

HOME MY LOAN OFFICER MESSAGES 1

Wait for me to review your application.

Thanks for submitting your application! I'll start reviewing your application and will get back to you as soon as possible. For now, you don't have to do anything but wait for a message from us.

Your To-Dos

Loan Condition	Files Uploaded	Status/Action
Provide copy of 2018 W-2s. (Ken)		Upload
Provide copy of 2019 W-2s. (Ken)		Upload
Provide copy of complete 2018 tax returns, including all pages. (Ken)		Upload
Provide copy of complete 2019 tax returns, including all pages. (Ken)		Upload

Loan Status
Processing (Submitted Application)

Loan Summary

Loan #: R2L8U7CM
Address: TBD Middletown, NJ 07748
Purpose: Purchase
Loan Amount: \$160,000.00

Loan Docs
No docs available yet.

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