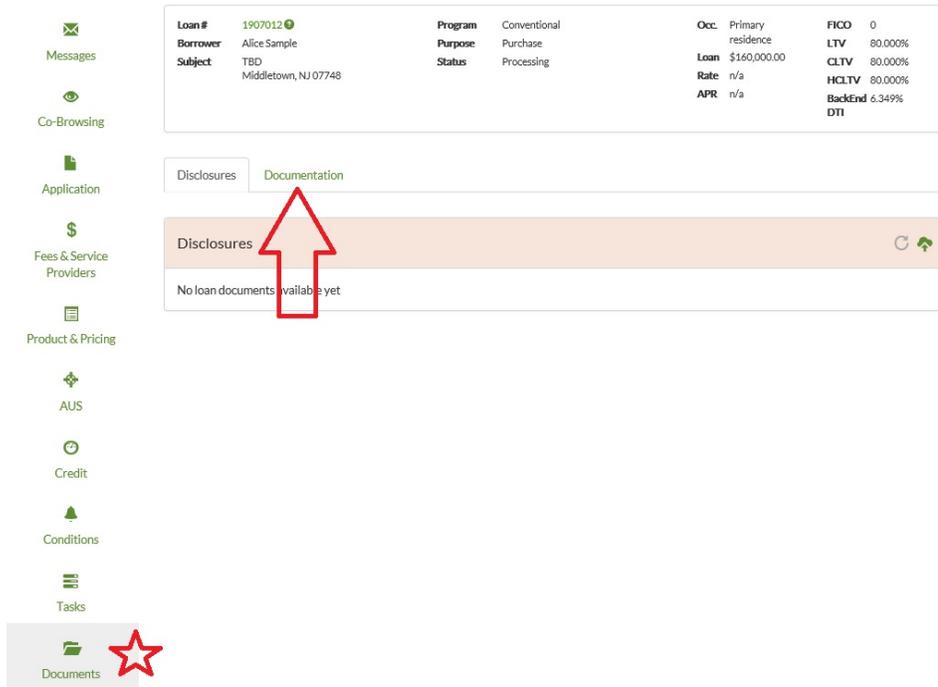
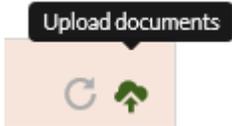


Sharing Docs with Borrowers

1. Open the loan in BSM and go to the Documents folder. Next you will need to click the **Documentation** tab, as shown below.



2. From here click the  button, located on the right corner of the Documentation bar.



As always if you have any questions or concerns please reach out to BSMAdmin@greenwaylending.com

- A popup window will appear where you can add a description that will appear to the borrower.
Note the file type will need to be a PDF, JPG PNG or TIF file type.

Upload Documents

Choose any .PDF, .JPG, .PNG or .TIF file to upload.

Description

Type in a description here so you know what you uploaded...

Choose File to Upload

Upload

Close

- In order to make the doc visible to the borrower you will now need to click the check box beneath the ***“show to Borrower”*** column, as shown below.

- Messages
- Co-Browsing
- Application
- Fees & Service Providers
- Product & Pricing
- AUS
- Credit
- Conditions
- Tasks
- Documents
- Status

Loan #	1907012	Program	Conventional	Occ.	Primary residence	FICO	0
Borrower	Alice Sample	Purpose	Purchase	Loan	\$160,000.00	LTV	80.000%
Subject	TBD Middletown, NJ 07748	Status	Processing	Rate	n/a	CLTV	80.000%
				APR	n/a	HCLTV	80.000%
						BackEnd DTI	6.349%

Disclosures | Documentation

Documentation 🔄 🏠

🔍 Search

Application (1)

Date	Category	Doc Type	Uploaded By	Action	Show to Borrower?
7/5/2019 @ 1:12:52 pm	Application	This is a test to see if borrower can get docs we upload here.	Rachel Gisleson	Pending	<input type="checkbox"/>

As always if you have any questions or concerns please reach out to BSMAdmin@greenwaylending.com

Curious how this will look to your borrower? They will need to log in and click continue from the **My Loans** screen which will bring them to the Loa Dashboard as seen below, on the right-hand side there is the **Loan Docs** section. This is where the borrower will be able to click on the doc and view/download.

Loan Dashboard

Home Messages

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

Nice! There are no conditions right now.

Loan Condition	Files Uploaded	Status/Action
----------------	----------------	---------------

Loan Status

Loan Approval
(Submitted Application)

Loan Summary

Purpose: Purchase
Loan Amount: \$160,000.00

Loan Docs

This is a test to see if borrower can get docs we upload here. - 7/5/19