

B.O.L.T. TRAINING

Lesson 08 - Creating A New Loan

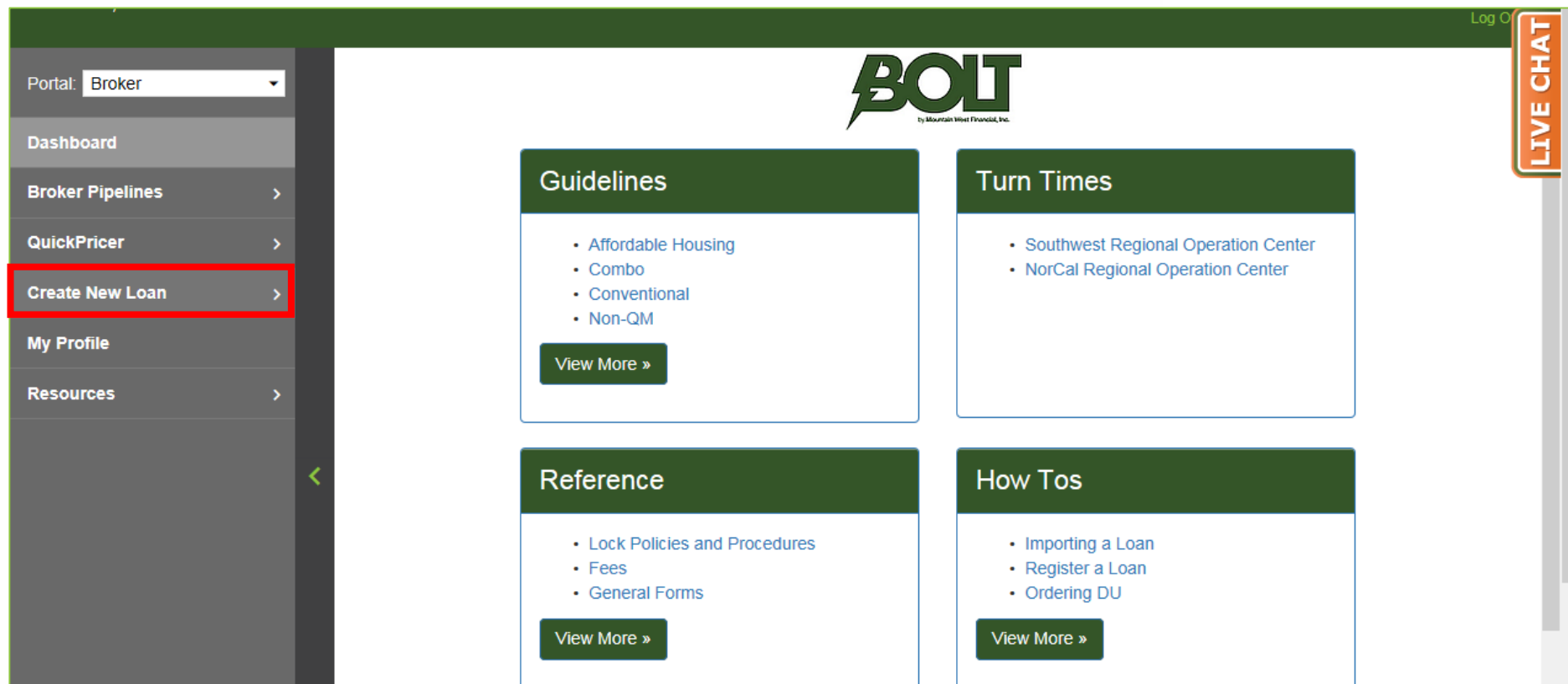


In This Training We Will Discuss

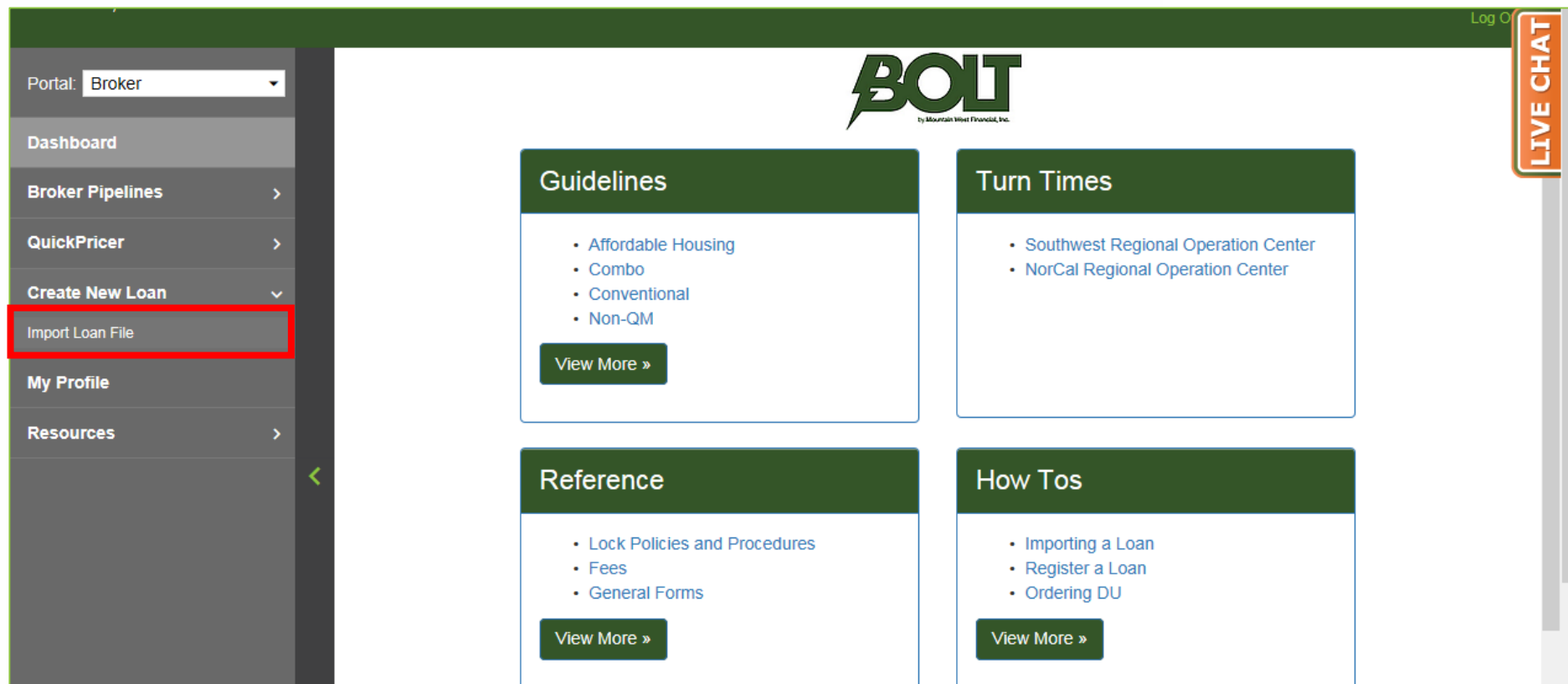
- Creating A New Loan
 - Three Ways To Create A New Loan
 - Retrieve Existing Loan From DO/DU
 - Retrieve Existing Loan From LPA
 - Import Fannie Mae 3.2 File



Creating A New Loan



1. Click “Create New Loan”.



2. Click “Import Loan File”.

Portal: **Broker**

Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☒ Import Fannie Mae file

CHOOSE FILE No file chosen *

☐ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

IMPORT

☐ Retrieve existing loan from DO/DU

☐ Retrieve existing loan from LPA

LIVE CHAT

3. The Import Loan screen will appear.



Three Ways To Create A New Loan

- **Retrieve Existing Loan from DO/DU**
 - Preferred when DO/DU was ran prior to the loan existing in B.O.L.T.
- **Retrieve Existing Loan from LPA**
 - Preferred when LPA was ran prior to the loan existing in B.O.L.T.
- **Import Fannie Mae 3.2 File**
 - Preferred when DO/DU will be ran within B.O.L.T.
 - Preferred when LP will be ran within B.O.L.T.



Retrieve Existing Loan from DO/DU

Portal: Broker

Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☒ Import Fannie Mae file

CHOOSE FILE No file chosen *

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IMPORT

☒ Retrieve existing loan from DO/DU

☐ Retrieve existing loan from LPA

LIVE CHAT

1. Click “Retrieve existing loan from DO/DU”.

Portal: Broker

Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☐ Import Fannie Mae file

☒ Retrieve existing loan from DO/DU

Casefile ID *

Enter Casefile ID

DO/DU User ID *

☐ Remember my User ID

DO/DU Password *

☒ Get credit report from casefile (if any)

☐ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

IMPORT

LIVE CHAT

2. Enter Casefile ID.

Portal: Broker

Dashboard

Broker Pipelines

QuickPricer

Create New Loan

Import Loan File

My Profile

Resources

Import Loan File

* Indicates required fields

☐ Import Fannie Mae file

☒ Retrieve existing loan from DO/DU

Casefile ID *

Enter Casefile ID

DO/DU User ID *

Enter DO/DU User ID ☐ Remember my User ID

DO/DU Password *

☒ Get credit report from casefile (if any)

☐ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

IMPORT

LIVE CHAT

3. Enter DO/DU User ID.

Portal: Broker

Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☐ Import Fannie Mae file

☒ Retrieve existing loan from DO/DU

Casefile ID *

DO/DU User ID *
 ☐ Remember my User ID

DO/DU Password *

☒ Get credit report from casefile (if any)

☐ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

IMPORT

LIVE CHAT

4. Enter DO/DU Password.

Portal: Broker

Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☐ Import Fannie Mae file

☒ Retrieve existing loan from DO/DU

Casefile ID *

DO/DU User ID *
 ☐ Remember my User ID

DO/DU Password *

☒ Get credit report from casefile (if any)

☐ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

IMPORT

LIVE CHAT

5. Checkmark “Get credit report from casefile (if any)”.

Portal: Broker

Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☐ Import Fannie Mae file

☒ Retrieve existing loan from DO/DU

Casefile ID *

DO/DU User ID *

☐ Remember my User ID

DO/DU Password *

☒ Get credit report from casefile (if any)

☒ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

LIVE CHAT

6. Checkmark "I understand that applicants' Social Security Numbers may be stored and potentially visible to other users."

Portal: Broker

Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☐ Import Fannie Mae file

☒ Retrieve existing loan from DO/DU

Casefile ID *

DO/DU User ID *

☐ Remember my User ID

DO/DU Password *

☒ Get credit report from casefile (if any)

☒ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *


IMPORT

LIVE CHAT

7. Click “Import”.



Retrieve Existing Loan from LPA



Import Loan File

* Indicates required fields

☒ Import Fannie Mae file

No file chosen *

☐ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

☐ Retrieve existing loan from DO/DU

☐ Retrieve existing loan from LPA

LIVE

Dashboard

Broker Pipelines >

QuickPricer >


Create New Loan v

Import Loan File

My Profile

Resources >

1. Click “Retrieve existing loan from LPA”.



Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☐ Import Fannie Mae file

☐ Retrieve existing loan from DO/DU

☒ Retrieve existing loan from LPA

LPA Loan ID *

Enter LPA Loan ID

LPA AUS Key Number

LPA NOTP Number

☐ Import Credit Report

☐ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

IMPORT

LIVE

2. Enter LPA Loan ID.



Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☐ Import Fannie Mae file

☐ Retrieve existing loan from DO/DU

☒ Retrieve existing loan from LPA

LPA Loan ID *

LPA AUS Key Number

LPA NOTP Number

☒ Import Credit Report

☐ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

IMPORT

LIVE

5. Checkmark "Import Credit Report".



Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☐ Import Fannie Mae file

☐ Retrieve existing loan from DO/DU

☒ Retrieve existing loan from LPA

LPA Loan ID *

LPA AUS Key Number

LPA NOTP Number


☒ Import Credit Report

☒ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

IMPORT

LIVE

6. Checkmark “I understand that applicants’ Social Security Numbers may be stored and potentially visible to other users.”.



Dashboard

Broker Pipelines >

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Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☐ Import Fannie Mae file

☐ Retrieve existing loan from DO/DU

☒ Retrieve existing loan from LPA

LPA Loan ID *

Enter LPA Loan ID

LPA AUS Key Number

LPA NOTP Number

☒ Import Credit Report

☒ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

IMPORT

LIVE

7. Click “Import”.



Import Fannie Mae 3.2 File

Portal: Broker

Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☒ Import Fannie Mae file

CHOOSE FILE No file chosen *

☐ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

IMPORT

☐ Retrieve existing loan from DO/DU

☐ Retrieve existing loan from LPA

LIVE CHAT

1. Click "Import Fannie Mae file".

Portal: **Broker**

Import Loan File

* Indicates required fields

☒ Import Fannie Mae file

CHOOSE FILE No file chosen *

☐ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

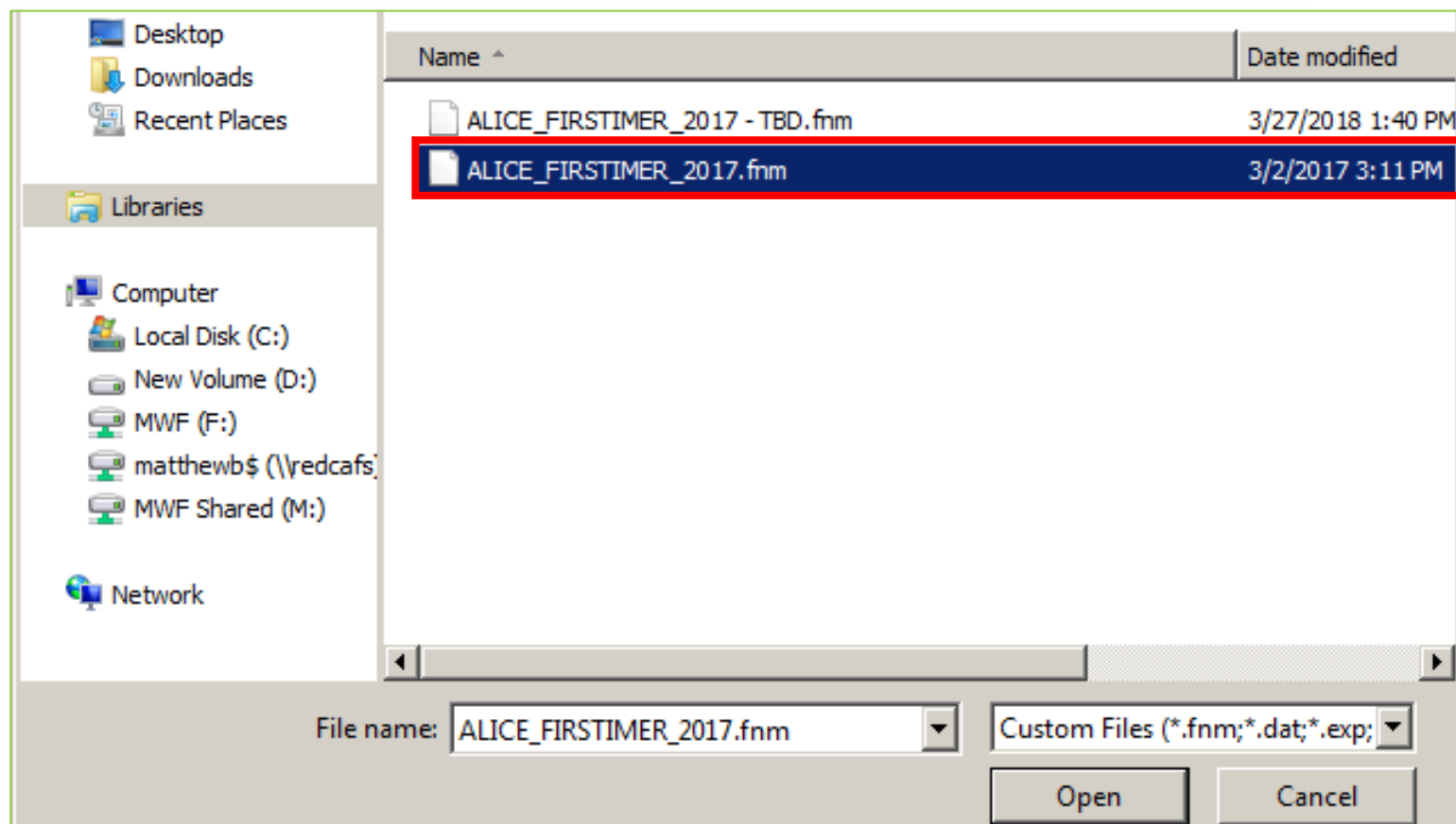
IMPORT

☐ Retrieve existing loan from DO/DU

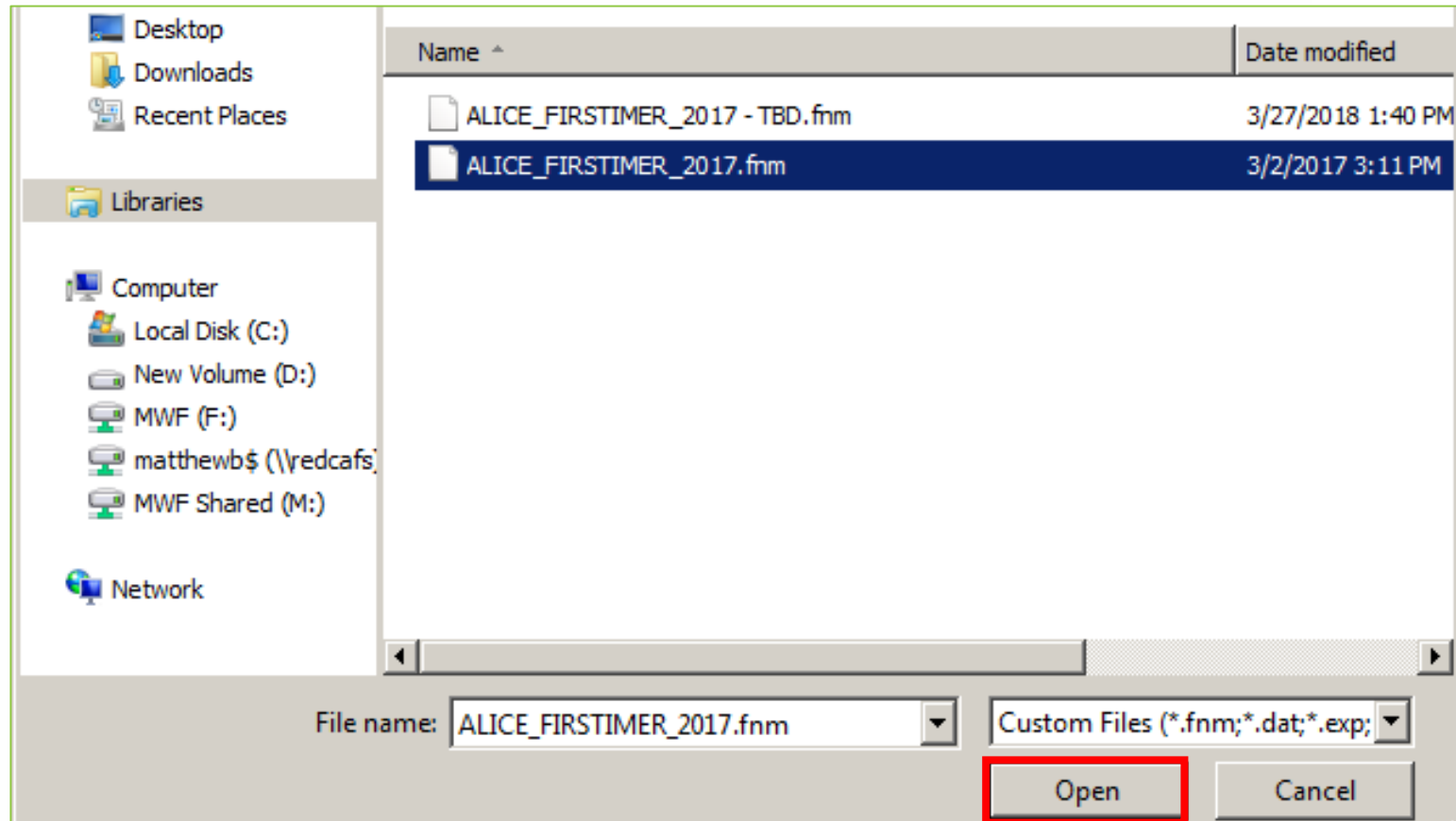
☐ Retrieve existing loan from LPA

LIVE CHAT

2. Click “Choose File”.



3. Find and select the Fannie Mae 3.2 File from your computer.



4. Click “Open”.

Portal: Broker

Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☒ Import Fannie Mae file

CHOOSE FILE ALICE_FIRSTIMER_2017.fnm *

☒ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

IMPORT

☐ Retrieve existing loan from DO/DU

☐ Retrieve existing loan from LPA

LIVE CHAT

5. Checkmark "I understand the applicants' Social Security Numbers may be stored and potentially visible to other users."

Portal: Broker

Dashboard

Broker Pipelines >

QuickPricer >

Create New Loan v

Import Loan File

My Profile

Resources >

Import Loan File

* Indicates required fields

☒ Import Fannie Mae file

CHOOSE FILE ALICE_FIRSTIMER_2017.fnm *

☒ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

IMPORT

☐ Retrieve existing loan from DO/DU

☐ Retrieve existing loan from LPA

LIVE CHAT

6. Click "Import".



THANK YOU FOR VIEWING

For further B.O.L.T. Training, please visit <https://www.mwfwholesale.com>