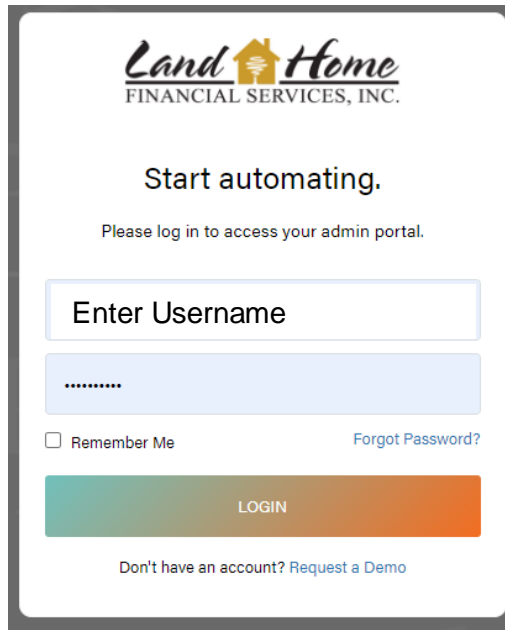


HOW TO SUBMIT A LOAN THROUGH DASH

Please utilize the following steps to submit a loan.

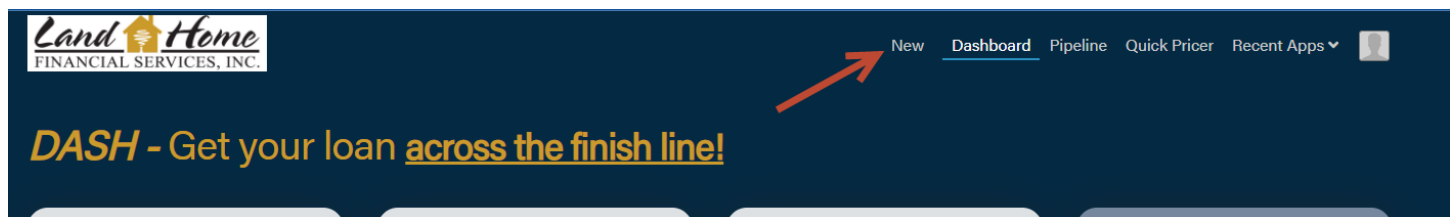
Log in to [DASH](#)

Enter credentials provided by LHFS.



TPO Dashboard will automatically open upon successful login.

- Select “New” to upload a new file, OR
- Select “Dashboard” to review current pipeline and/or status of files.



Upload a New File

Select “New” to upload a loan file and select “Import MISMO 3.4 (xml).”

1. Select “Choose MISMO File”
 - Upload 3.4
2. Under “Channel” field, select “Brokered” or “Correspondent”
3. Make certain the following fields are accurate:
 - “Company” and “Internal Contact (TPO LO)”
4. Upon completion, click “Process MISMO File” to start the file import process.

NEW SUBMISSION FORM


File Import

1 Upload File 2 Review Data 3 Loan Characteristic(s) 4 Borrower Characteristic(s) 5 Submission

Import MISMO 3.4 (xml) Import DU 3.2 (fnm) Start New Application

1 Please upload a valid MISMO 3.4 file to start your submission

Choose MISMO File

File name	Action
 Fish_173589.xml	Remove

Choose the Channel

Channel

Company

Choose the TPO LO

Internal Contact (TPO LO)

2 **Select one of the following: "Brokered" or "Correspondent"**

3 **Make certain the following items are accurate: "Company", and "Internal Contact (TPO LO)"**

4 **Process MISMO File**

Uploading Loan – Review Data

Please Note: User must select the correct Loan Purpose and Loan Type to accurately trigger necessary submission requirements.

1. Loan Purpose - Select applicable purpose
2. Loan Type - Select applicable type
3. Review and complete “Loan Characteristic(s)” as needed
4. Proceed to “Borrower Characteristic(s)” and complete as needed
5. Click “Proceed to Final Review” (Submission)

NEW SUBMISSION FORM

1 Upload File

2 Review Data

3 Loan Characteristic(s)

4 Borrower Characteristic(s)

5 Submission

Borrower 1

Drop down arrow and select appropriate Loan Purpose.

1

--Select One--

Imported Loan Information

Borrower 1

Phil Fish
SSN: 9999
(222) 222-2222
6/19/1985
Phil@test.com

Mailing Address: 3096 Plaza Blanca 87507

Subject Property: 3096 Plaza Blanca, SANTA FE, — 87507

Loan Type: —
Loan Purpose: Refinance
Loan Amount: \$250,000.00
Appraised Value: \$415,000.00
LTV/CLTV: —% / —%
Rate: 5.500%

Please confirm/provide the loan purpose and loan type

Loan Purpose

Refinance
--Select--
Purchase
Refinance
OwnOption Lease to Own
LINK - Seller Financing Agreement

Loan Type

--Select--
Conventional
FHA
FHA Streamline
VA
VA IRRRL
USDA
Jumbo
Power Purchase Conventional
Express Conventional
Within Reach Conventional
Within Reach FHA
JetOn Jumbo
Elite Jumbo
Champion Jumbo
Access Express Jumbo
Access Jumbo
Hobby Farm
TRIO OwnOption
LINK - Seller Financing Agreement
Conventional

Drop down arrow and select appropriate Loan Type.

2



Review outstanding conditions:

Phil Fish

SANTA FE
3096 Plaza Blanca
Address

Lead - New
Loan Status

Loan Number

Wholesale

Click anywhere within the blue square to review outstanding conditions.

Lead - New
Loan Status

Your Progress
29% to goal

Completed In Progress

5
Outstanding
Conditions

Review URLA by clicking on "URLA 2020" and edit as needed.

Mia Toretto

CONCORD
1234 Test Street
Address

Lead - New
Loan Status

Loan Number

Wholesale
Channel

Edit URLA by clicking "URLA 2020"

Loan Detail

360
Term

\$0.00 \$459,000.00
Subordinate Lien Amount Total Loan Amount

Loan Summary

URLA 2020

Services

Fees

Pricing

3. Real Estate Owned

5. Declarations

7. Military Service

8. Demographic Information of Borrower

9. Loan Originator Info

L1. Property and Loan Information

L2. Title Information


L3. Mortgage Loan Information

L4. Qualifying the Borrower - Minimum Required Funds or Cash Back

Pay special attention to yellow notifications, clear them if possible.

Submission Screen

Upload applicable documents and click “Submit”

**Mia Toretto**

CONCORD
1234 Test Street
Address

Lead - New
Loan Status

Loan Number

Wholesale
Channel

Loan Summary

URLA 2020

Services

Fees

Pricing







Conditions

Submission

Additional


Items Required for Submission

Search:

Detail	Borrower	Description	Request Date	Due Date	View File	Status
		Asset Documentation per AUS Findings (Showing Sufficient Funds)	8/25/22 2:46 PM	8/25/22 2:46 PM		<button>Pending</button>
		Purchase Contract and All Addendums	8/25/22 2:46 PM	8/25/22 2:46 PM		<button>Pending</button>
	Mia Toretto	Current Paystub	8/25/22 2:46 PM	8/25/22 2:46 PM		<button>Pending</button>
	Mia Toretto	Photo ID	8/25/22 2:46 PM	8/25/22 2:46 PM		<button>Pending</button>
	Mia Toretto	Upload Credit Report Dated Within 90 Days	8/25/22 2:46 PM	8/25/22 2:46 PM		<button>Pending</button>
	Mia Toretto	W2's Per AUS	8/25/22 2:46 PM	8/25/22 2:46 PM		<button>Pending</button>

Showing 1 to 6 of 6 entries

Data Validations

 **Passed**

Disclosure Path

Who is sending disclosures

--Select One--

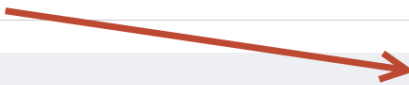
There is no key date for TRID Application Date

Program

Program Name	Rate	Locked?	APR	Price	Monthly P&I
	5.250				

Final Submission Info

Final Notes



Submit Loan

Review / Submits the Following Via Dash

- ☐ Uploads 3.4
 - ☐ Complete URLA - pay special attention to yellow notifications, clear them if possible
- ☐ Upload items required for submission
 - ☐ Include Credit Report
 - ☐ Verbal Credit Authorization, if applicable ([Access "How to Upload Documents / Complete a Form via DASH"](#))
 - Set up a customized signature through DASH! See screen shots below for steps on how to update user profile.

Create or Edit Profile Signature Via Dash:

Click on user icon located in the upper right corner.

1. Select "Profile"
2. Under the "Profile" tab select "Edit" to add or updated signature
3. Accept signature and select "Save"

This signature will appear on documents created through DASH.

How to Upload Documents / Complete a Form via DASH:

1. Click on the applicable green arrow button (located under "Detail") to upload documents. corner.
2. If applicable, Generate form
 - A. Select "Start Document Generation"
 - B. Document Generation window will appear – Enter authorization date, select "Finish & Generate Doc"
 - C. Completed document has been instantly created!
3. Review Form or Document
 - D. Click on applicable link to access document
 - E. Optional, select the trash icon to delete.

The screenshot displays the DASH interface with a table of loan tasks. A red box labeled '1' points to a green arrow icon in the 'Detail' column, with the text 'Utilize green arrow upload button to upload documents'. Another red box labeled '2' points to a green arrow icon in the 'Detail' column, with the text 'Need to create a form? If applicable, click on the green arrow upload button to generate form.'.

Error	Detail	Borrow	Due Date	View File	Status
		Purchase Contract and All Addendums	8/25/22 2:46 PM	8/25/22 2:46 PM	Pending
		Earnest Money Deposit - Showing Cleared Through Bank	8/25/22 2:46 PM	8/25/22 2:46 PM	Pending
					Pending
					Pending
		Verbal Credit Authorization	8/25/22 2:46 PM	8/25/22 2:46 PM	Pending
		Mia Toretto Upload Credit Report Dated Within 90 Days	8/25/22 2:46 PM	8/25/22 2:46 PM	Pending
		Upload Credit Inquiry	8/25/22	8/25/22	

Below the table, there are two pop-up windows. The first window, 'Task Information', shows details for 'Verbal Credit Authorization' and has a red box labeled 'A' pointing to the 'Start Document Generation' button. The second window, 'Generate Document Template', shows a form with a red box labeled 'B' pointing to the 'Finish & Generate Doc' button.

Error	Detail	Borrower	Description	Request Date	Due Date	View File	Status
			Purchase Contract and All Addendums	8/25/22 2:46 PM	8/25/22 2:46 PM		Pending
			Earnest Money Deposit - Showing Cleared Through Bank	8/25/22 2:46 PM	8/25/22 2:46 PM		Pending
			Asset Verification (Show Funds)	8/25/22 2:46 PM	8/25/22 2:46 PM		Pending
			Verbal Credit Authorization	8/25/22 2:46 PM	8/25/22 2:46 PM	Verbal Credit Authorization.pdf	Pending
		Mia Toretto	Upload Credit Report Dated Within 90 Days	8/25/22 2:46 PM	8/25/22 2:46 PM		Pending
		Mia Toretto	Upload Credit Inquiry Letter (120 Days)	8/25/22 2:46 PM	8/25/22 2:46 PM		Pending

How to access or review form and/or documents

Form has been successfully created if the highlighted is visible.

Task Information

Description: Verbal Credit Authorization

Notes: To notify a user, simply type @ and select them from the list.

Request Date: 08/25/2022 2:46PM

Due Days: 0

Responsible Party: Johnson, Christina

Condition: ☐

Request From Borrower: ☐

Generate Document

Start Document Generation

File name

☐ Verbal Credit Authorization.pdf

Action

Click on document to review

Delete is an option if changes are needed

EXAMPLE DOCUMENT (FORM INCLUDING CUSTOM SIGNATURE)

Verbal Credit Authorization Certification

Borrower Name: Mia Toretto
Property Address: 1234 Test Street
Property City: CONCORD State: CA Zip: 94519

I, the undersigned representative of Fake External Company (Main),
do hereby certify that I had verbal permission to pull the credit report for the above-referenced borrower(s) on 8/25/2022

By (Loan Officer's Signature):
Date: 08/25/2022

