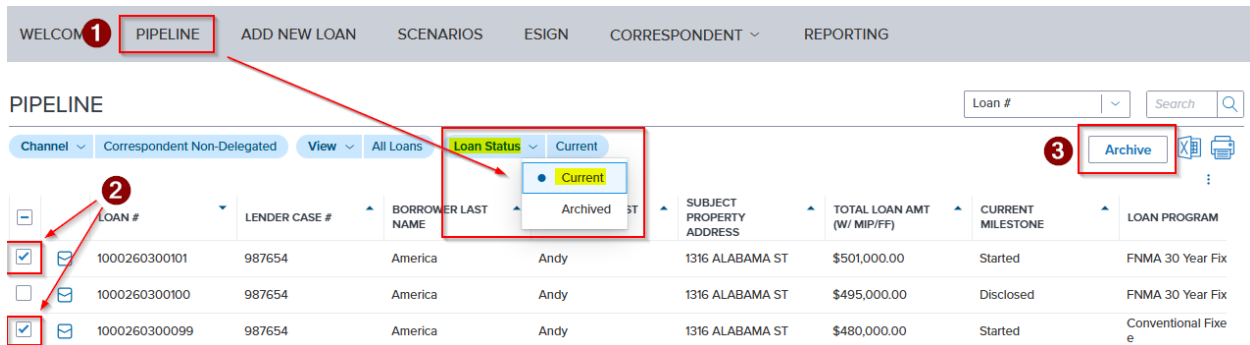


Archiving Loans

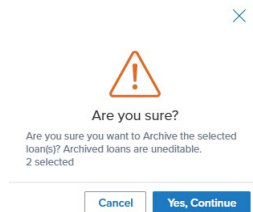
Clean up the Client Portal pipeline by archiving loans that are not moving forward in the process once 'Started'. This function should only be utilized for loans that have not been disclosed through the portal and for loans that have not been submitted to underwriting. For those loans, please follow the process for 'Withdrawing/Cancelling a Loan' in the website Training Documents.

Access the 'Current' loans from 'PIPELINE' in the gray toolbar. Check the checkbox for the loan(s) you wish to archive then click the 'Archive' button:



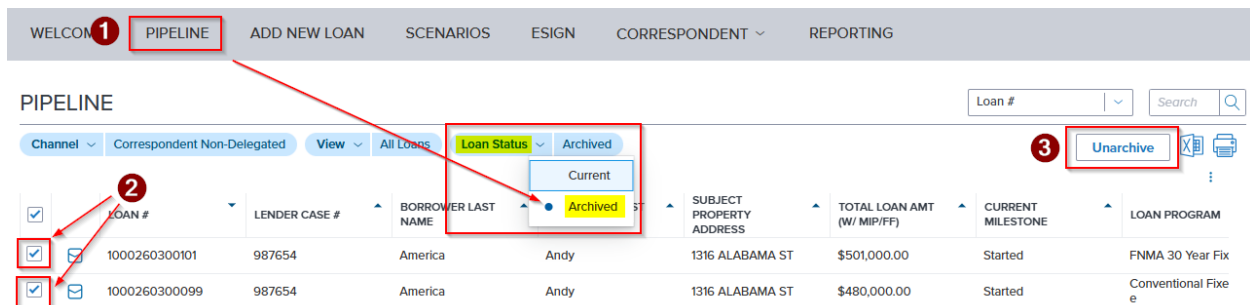
Channel	Correspondent Non-Delegated	View	All Loans	Loan Status	Current	Archived	ST	SUBJECT PROPERTY ADDRESS	TOTAL LOAN AMT (W/ MIP/FF)	CURRENT MILESTONE	LOAN PROGRAM
<input checked="" type="checkbox"/>				<input checked="" type="radio"/>	<input type="radio"/>			1316 ALABAMA ST	\$501,000.00	Started	FNMA 30 Year Fix
<input type="checkbox"/>				<input type="radio"/>	<input type="radio"/>			1316 ALABAMA ST	\$495,000.00	Disclosed	FNMA 30 Year Fix
<input checked="" type="checkbox"/>				<input checked="" type="radio"/>	<input type="radio"/>			1316 ALABAMA ST	\$480,000.00	Started	Conventional Fixe

You will get a popup asking for confirmation:



Archiving does NOT change the status of the loan(s), but they will be removed from the PIPELINE of 'Current' loans.

If you erroneously archived a loan and wish to move it back to the 'Current' pipeline, access the 'Archived' loans from 'PIPELINE' in the gray toolbar. Check the checkbox for the loan(s) you wish to unarchive then click the 'Unarchive' button:



Channel	Correspondent Non-Delegated	View	All Loans	Loan Status	Archived	Current	ST	SUBJECT PROPERTY ADDRESS	TOTAL LOAN AMT (W/ MIP/FF)	CURRENT MILESTONE	LOAN PROGRAM
<input checked="" type="checkbox"/>				<input checked="" type="radio"/>	<input type="radio"/>			1316 ALABAMA ST	\$501,000.00	Started	FNMA 30 Year Fix
<input checked="" type="checkbox"/>				<input checked="" type="radio"/>	<input type="radio"/>			1316 ALABAMA ST	\$480,000.00	Started	Conventional Fixe

You will receive a popup asking for confirmation just like the above. Once confirmed, your loan will reappear in the 'Current' loan pipeline. Be sure you click 'Current' under 'Loan Status', as it will stay selected as 'Archived' until selected otherwise.