User Guide

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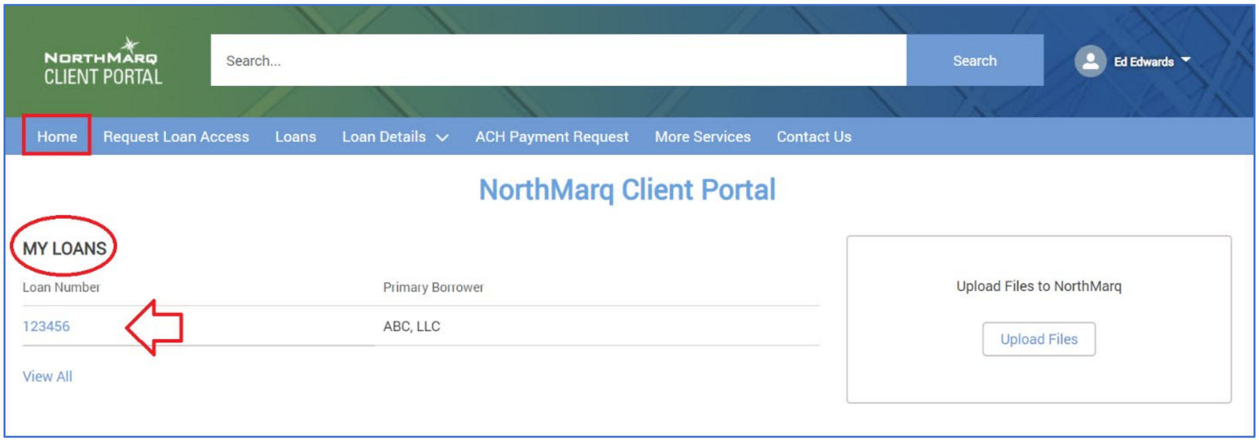
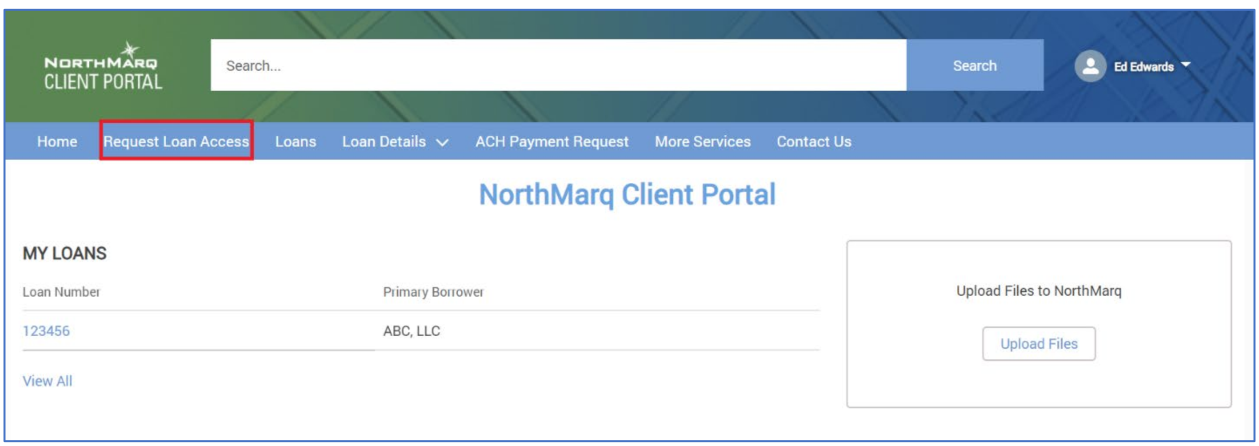
** Please note that if NorthMarq does not collect your loan payment, you may not see data in all of the fields illustrated in this user guide. **

How to Add a Loan to “My Loans” List

Upon login, the My Dashboard page will appear. The loans to which you have access will be listed under MY LOANS.

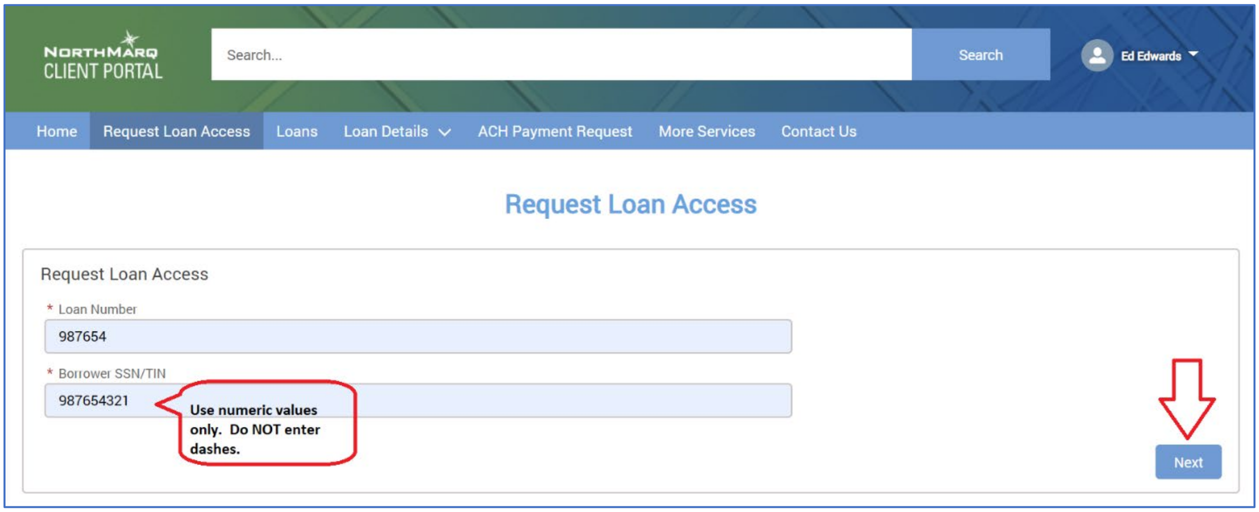


To request access to additional loans, click the REQUEST LOAN ACCESS tab in the main navigation bar.



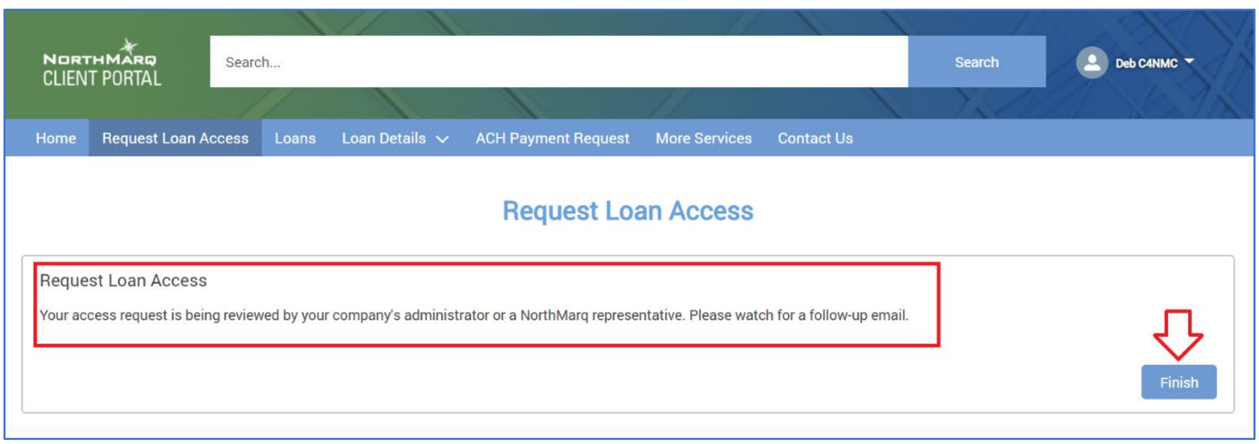
Enter the NorthMarq loan number and the Primary Borrower's TIN/SSN. **Only enter numeric numbers in the TIN/SSN field. Do NOT enter dashes.

Click NEXT.



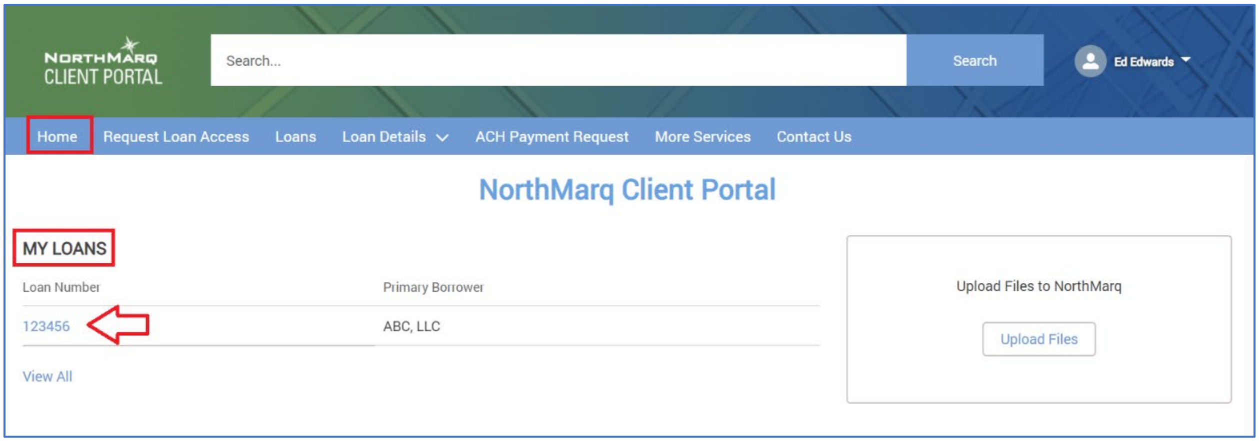
A confirmation screen will appear. Your company's loan administrator for that loan will be notified of your request for loan access via email and within the Client Portal.

Click Finish.

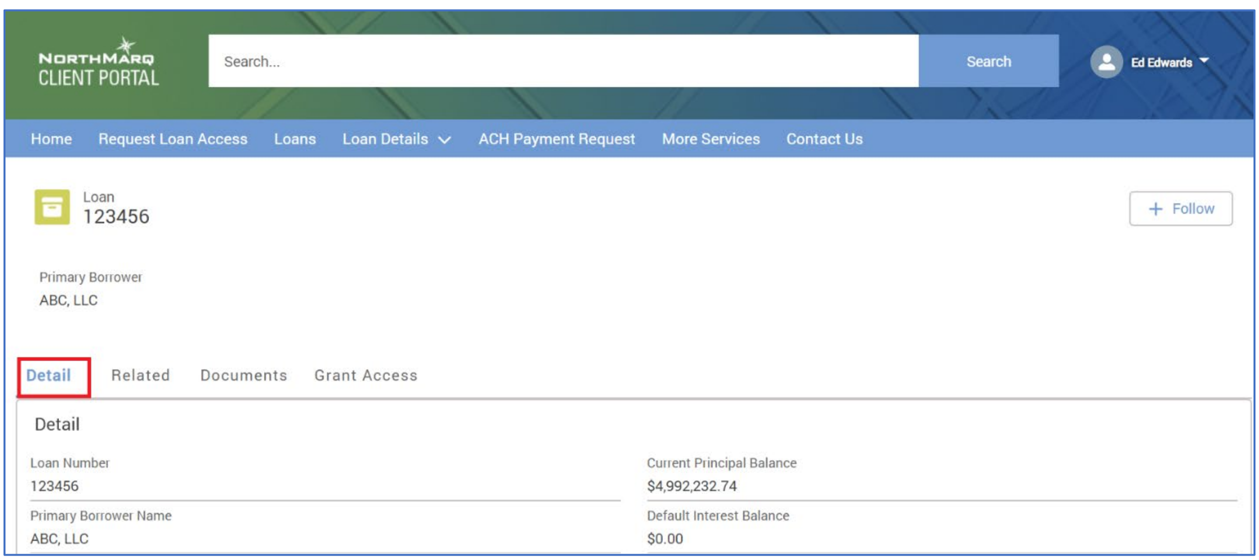


How to View Loan Details

To view the details of a loan, click on the loan number displayed on the My Dashboard page under “My Loans.”

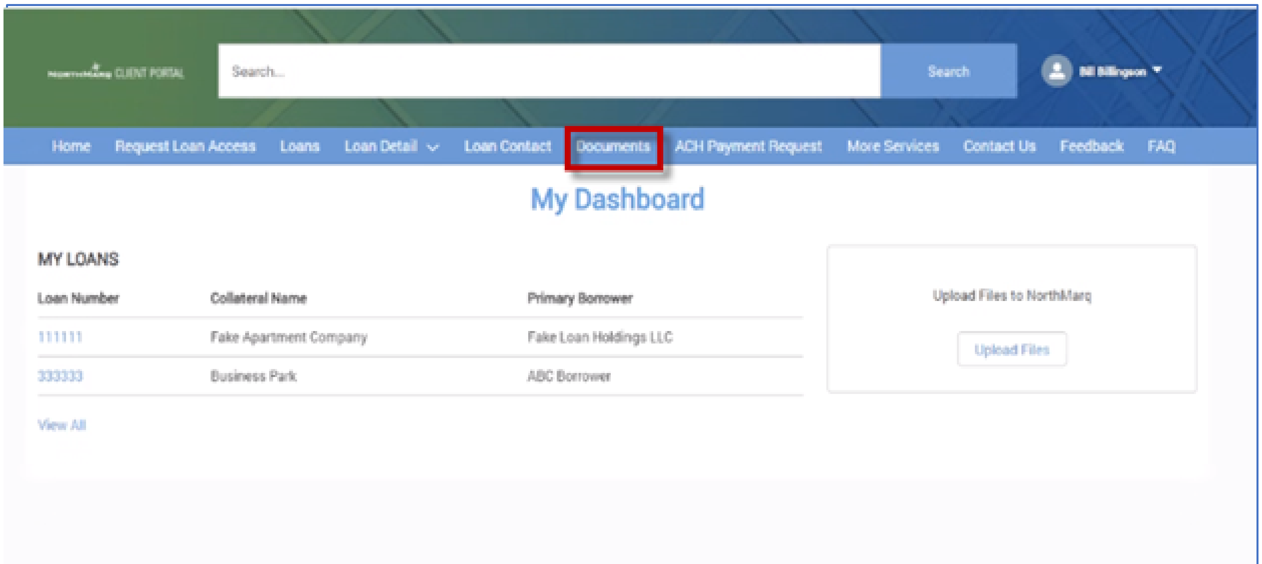


The loan details will appear under the “Detail” tab.

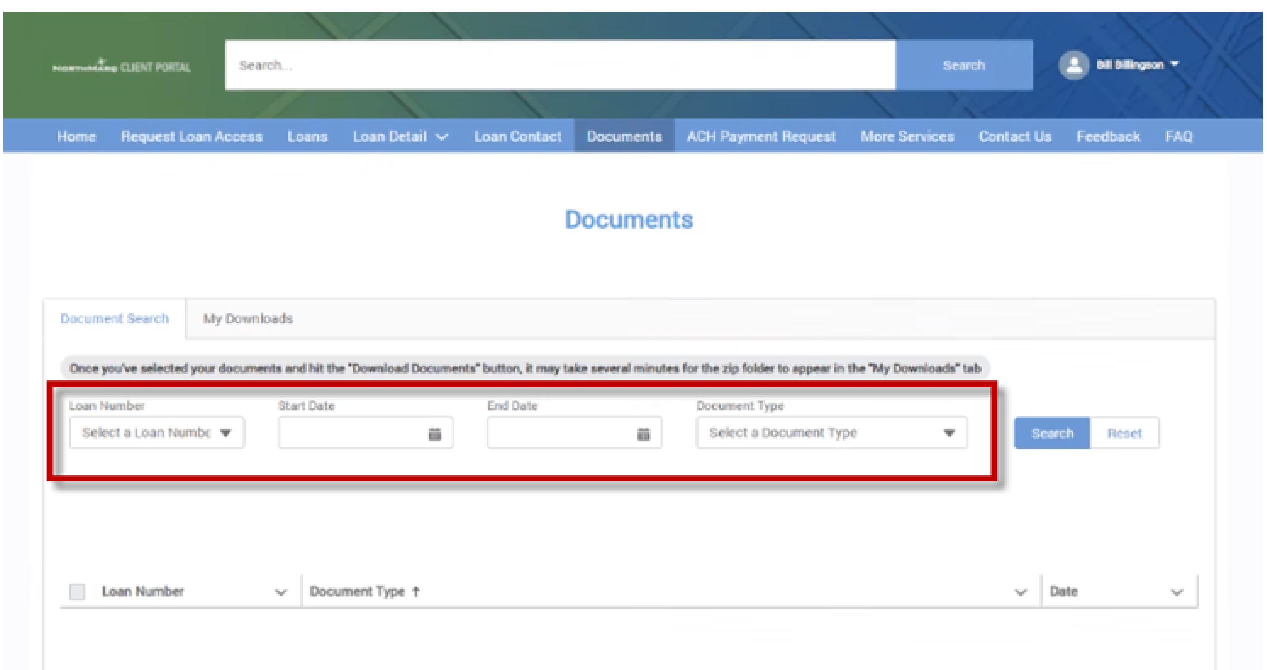


How to View Documents

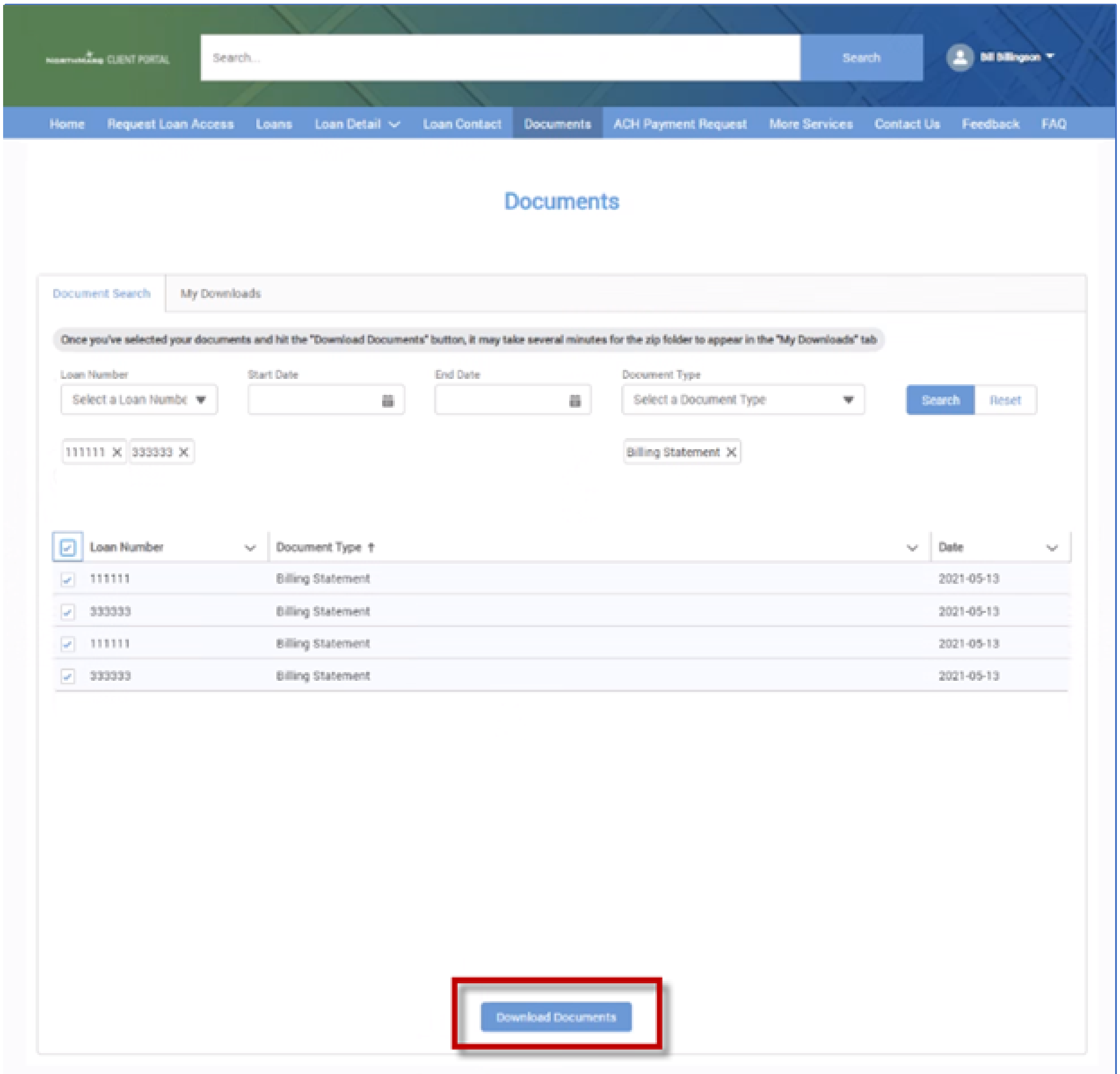
To view documents for your loans, click the Documents tab on the navigation bar.



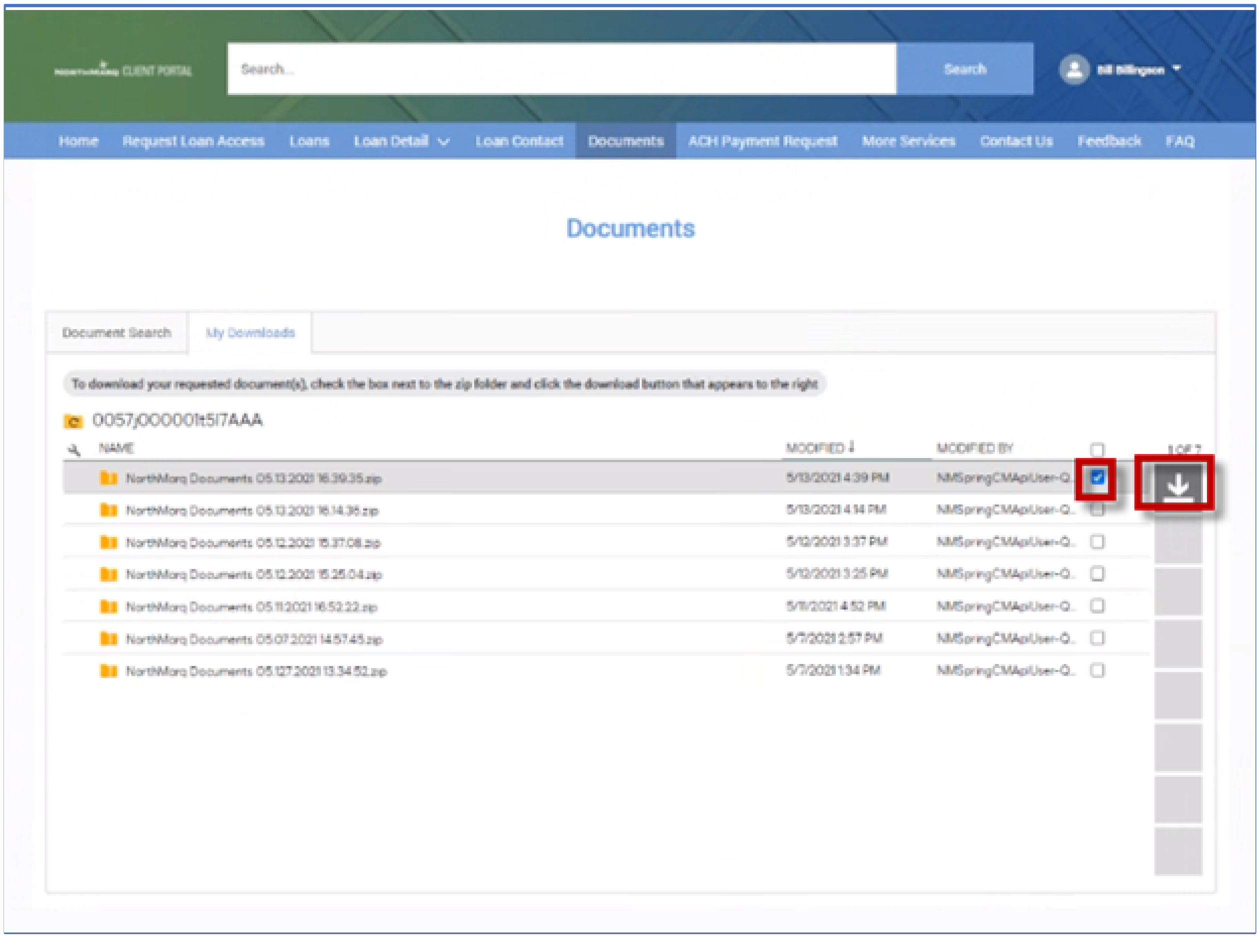
You can search by Loan Number, Start Date, End Date, as well as Document Type. The Loan Number and Document Type fields are multi-select, and the Start Date and End Date parameters further refine your results based on when the document was created.



Once the search criteria is set, click the Search button. All documents that meet the search criteria will be displayed on the page. In order to view the documents, you'll need to download them. You can do this by individually selecting the box to the far left of the relevant row(s), or can select all by clicking the box the left of the "Loan Number" column header, then clicking the "Download Documents" button at the bottom of the screen.



Once the files are packaged and ready to download, they will appear in the My Downloads page. To download, check the box next to the folder you want and click the download arrow that appears on the right-hand side.



The zip folder will contain all of the documents selected for download, and the documents will have a naming convention of Loan Number, Document Type, Date and Time Stamp. The zip folder will remain available for your download in the Client Portal for three calendars days.

How to Use the Upload Files Feature

The Upload Files feature will allow you to upload one or more files for loans to which you have access in the Client Portal. You can choose to upload one file for a loan or upload multiple files for multiple loans.

Each document you upload to the Client Portal will need to have a loan number and a Document Type assigned during the upload process.

Upon login, the My Dashboard page will appear. On the right side of the Dashboard page, look for the “Upload Files to NorthMarq” option.

TO UPLOAD ONE FILE:

1. Click on the “Upload Files” button on the home page. You should see a document upload page; if a login page appears, your session in the Client Portal may have timed out. Please log out of the Client Portal and then log back in to re-establish your connection.
2. Use the drag-and-drop or “Select a file” option in the left panel to choose the file you wish to upload.
3. When the document name appears in the left panel under “Your Document,” it is ready to be uploaded. (If you chose the wrong file, use the red “X” next to the document name to remove it from the upload panel.)
4. In the panel on the right, enter the Loan Number that corresponds with the document.
5. Select the option from the “Document Type” field that corresponds with the contents of the document (e.g., Financial Reporting, Tax Receipt, Form W-9, etc.).
6. Click the “Save” button in the left panel to complete the upload process.

TO UPLOAD MULTIPLE FILES FOR ONE LOAN:

1. Click on the “Upload Files” button on the home page. You should see a document upload page; if a login page appears, your session in the Client Portal may have timed out. Please log out of the Client Portal and then log back in to re-establish your connection.
2. Use the drag-and-drop or “Select a file” option in the left panel to choose <u>only the first file</u> you wish to upload. (This activates the upload process whether you are uploading one or multiple files.)
3. When the document name appears in the left panel under “Your Document,” it is ready to be uploaded. (If you chose the wrong file, use the red “X” next to the document name to remove it from the upload panel.)
4. In the panel on the right, enter the Loan Number that corresponds with the document.
5. Select the option from the “Document Type” field that corresponds with the contents of the document (e.g., Financial Reporting, Tax Receipt, Form W-9, etc.).
6. **Upload additional documents with the <u>same Document Type</u>** (e.g., Financial Reporting, Tax Receipt, etc.):
    a. Use the drag-and-drop or “Select File” option to select add other documents for the SAME loan number and the SAME Document Type. (If you add the wrong

file, use the red “X” next to the document name to remove it.)
NOTE: The upload option under “Step 3) Attach additional documents for this loan if needed” will apply the same “Document Type” to all files.

7. **Upload documents to the same loan with a <u>new Document Type</u>**:
    a. Scroll down to the “Additional Loan Section” and move on to “Step 4) Add documents for additional loans if needed.”
    b. Check the box next to “Add documents for a second loan.” (You will re-enter the same loan number when prompted.)
    c. Enter the same loan number used for the previous documents.
    d. Select the new Document Type from the drop-down menu.
    e. Drag-and-drop or select a new file to upload using the options available under “Loan 2 Attachment(s) 2a.”
    f. Use the “Document Type 2b” field to identify the next Document Type. (The files will be uploaded to the same loan number entered in the “Loan Number 2” field.)
    g. Use the drag-and-drop or Select Files option to attach the corresponding documents.

    If you need additional Document Types for the same loan, repeat the process using the “Add documents for a third loan” checkbox.

8. Click the “Save” button in the left panel to complete the upload process.

TO UPLOAD FILES FOR MULTIPLE LOANS

1. Click on the “Upload Files” button on the home page. You should see a document upload page; if a login page appears, your session in the Client Portal may have timed out. Please log out of the Client Portal and then log back in to re-establish your connection.
2. Use the drag-and-drop or “Select a file” option in the left panel to choose only the first file you wish to upload. (This activates the upload process whether you are uploading one or multiple files.)
3. When the document name appears in the left panel under “Your Document,” it is ready to be uploaded. (If you chose the wrong file, use the red “X” next to the document name to remove it from the upload panel.)
4. In the panel on the right, enter the Loan Number that corresponds with the document.
5. Select the option from the “Document Type” field that corresponds with the contents of the document (e.g., Financial Reporting, Tax Receipt, Form W-9, etc.).
6. **Upload additional documents with the same Document Type** (e.g., Financial Reporting, Tax Receipt, etc.):
    - Use the drag-and-drop or “Select File” option to select add other documents for the SAME loan number and the SAME Document Type. (If you add the wrong file, use the red “X” next to the document name to remove it.)
      NOTE: The upload option under “Step 3) Attach additional documents for this loan if needed” will apply the same “Document Type” to all files.

Upload documents to the SAME loan with a NEW Document Type:

- Scroll down to the "Additional Loan Section" and move on to "Step 4) Add documents for additional loans if needed."
- Check the box next to "Add documents for a second loan." (You will re-enter the same loan number when prompted.)
- Enter the same loan number used for the previous documents.
- Select the new Document Type from the drop-down menu.
  Drag-and-drop or select a new file to upload using the options available under "Loan 2 Attachment(s) 2a."
- Use the "Document Type 2b" field to identify the next Document Type. (The files will be uploaded to the same loan number entered in the "Loan Number 2" field.)
- Use the drag-and-drop or Select Files option to attach the corresponding documents.

  If you need additional Document Types for the same loan, repeat the process using the "Add documents for a third loan" checkbox.

\- OR -

Upload documents to a NEW loan:

- Scroll down to the "Additional Loan Section" and move on to "Step 4) Add documents for additional loans if needed."
- Check the box next to "Add documents for a second loan."
- Enter the new loan number.
- Select the appropriate Document Type from the drop-down menu.
- Use the drag-and-drop or Select File options to upload a document under "Loan 2 Attachment(s) 2a."
- If needed, use the "Document Type 2b" field to identify the next Document Type. (The files will be uploaded to the same loan number entered in the "Loan Number 2" field.)
- Use the drag-and-drop or Select Files option to attach the corresponding documents.

  If you need additional Document Types for the same loan, repeat the process using the "Add documents for a third loan" checkbox.

8. Use the checkboxes for the third loan, fourth loan, etc. to repeat the process as needed.
9. Click the "Save" button in the left panel to complete the upload process for all documents.

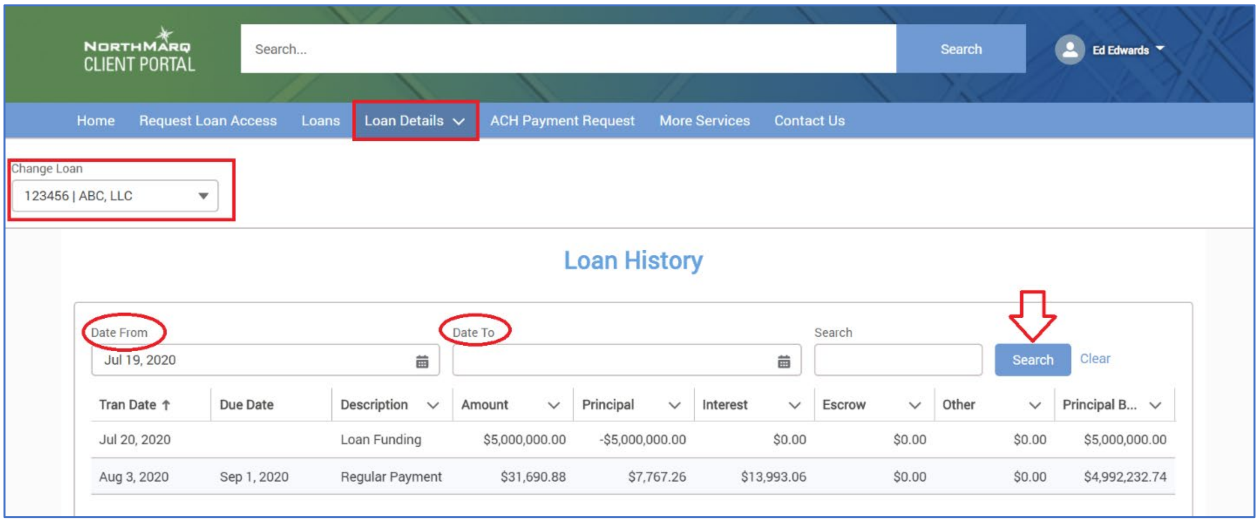
How to View Loan History

Select LOAN HISTORY from the “Loan Details” drop-down list in the main navigation.

Use the “Change Loan” drop-down menu in the upper left corner to select the appropriate loan.

Enter a date range to narrow your search.

Click the “Search” button.



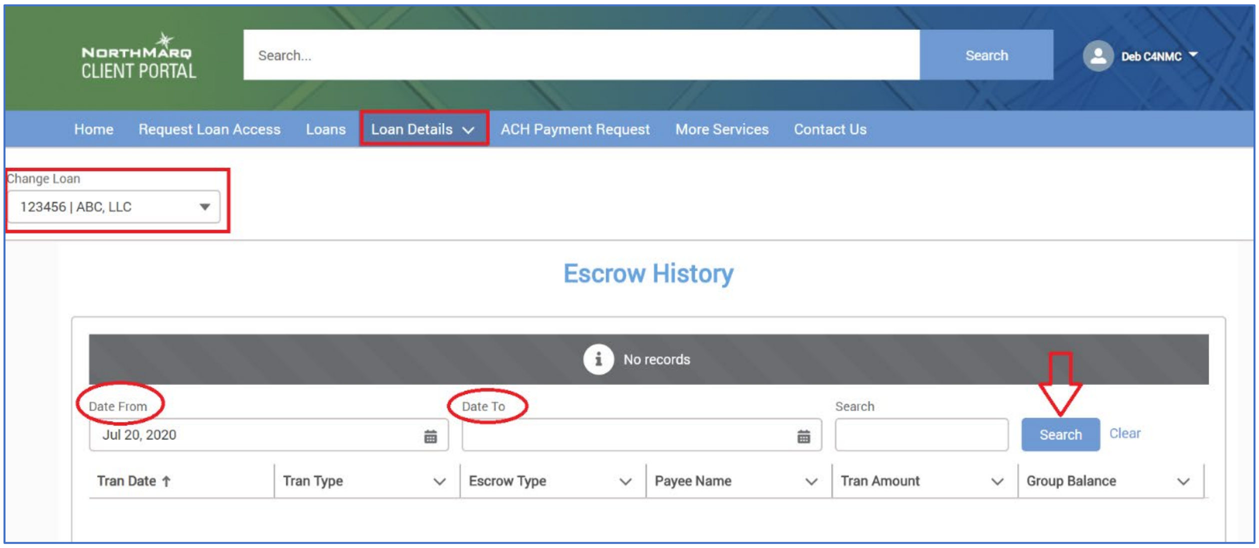
How to View Escrow History

Select ESCROW HISTORY from the “Loan Details” drop-down list in the main navigation.

Use the “Change Loan” drop-down menu in the upper left corner to select the appropriate loan.

Enter a date range to narrow your search.

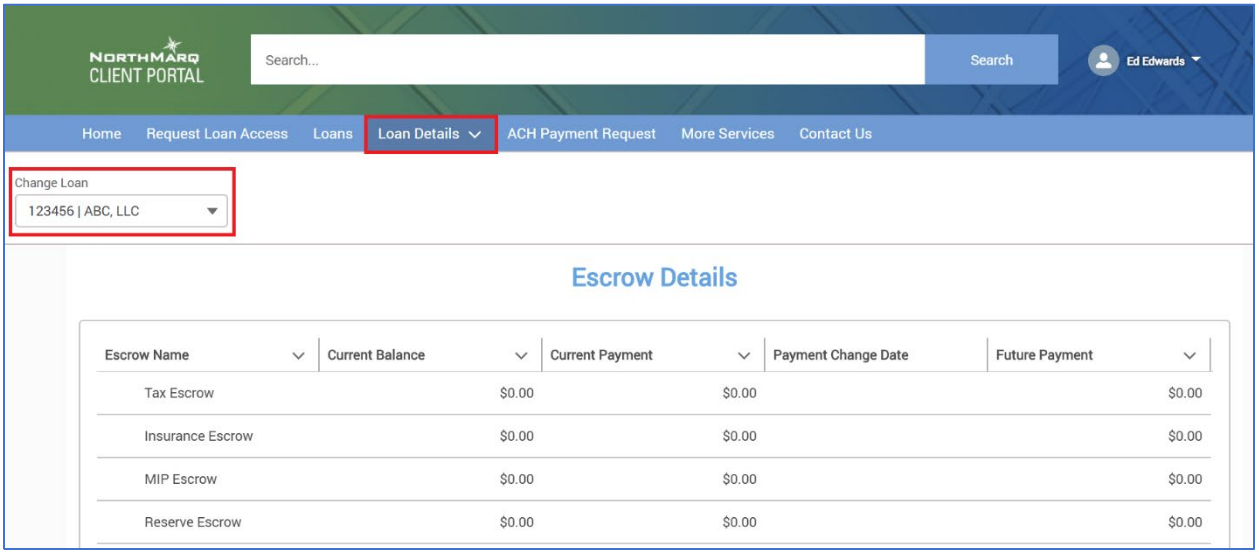
Click the “Search” button.



How to View Escrow Details

Select ESCROW HISTORY from the “Loan Details” drop-down list in the main navigation.

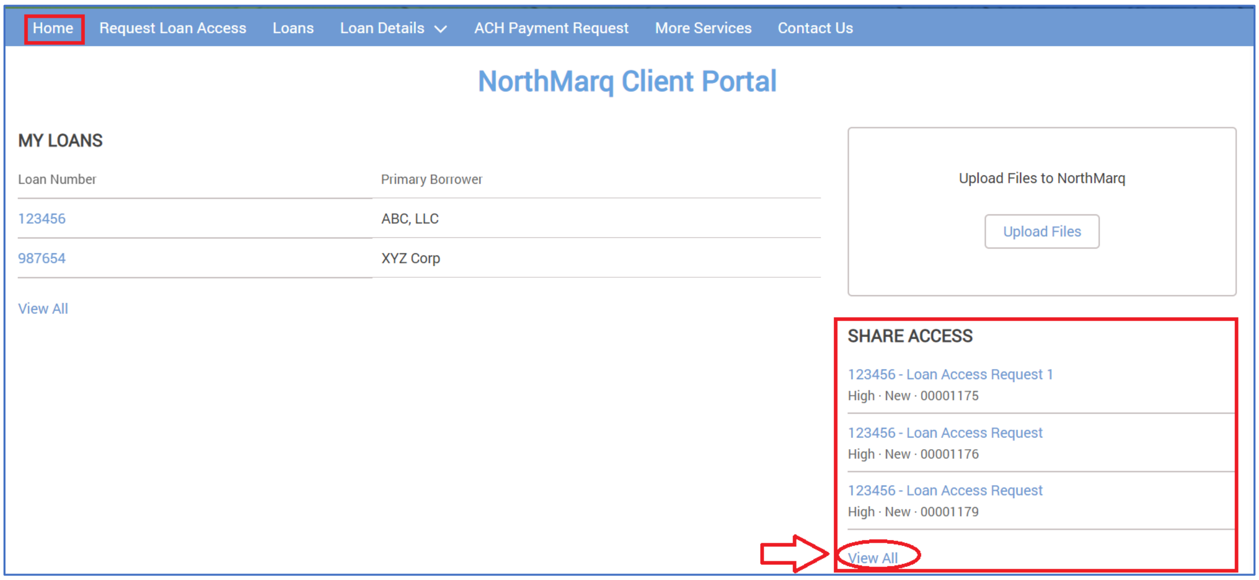
Use the “Change Loan” drop-down menu in the upper left corner to select the appropriate loan.



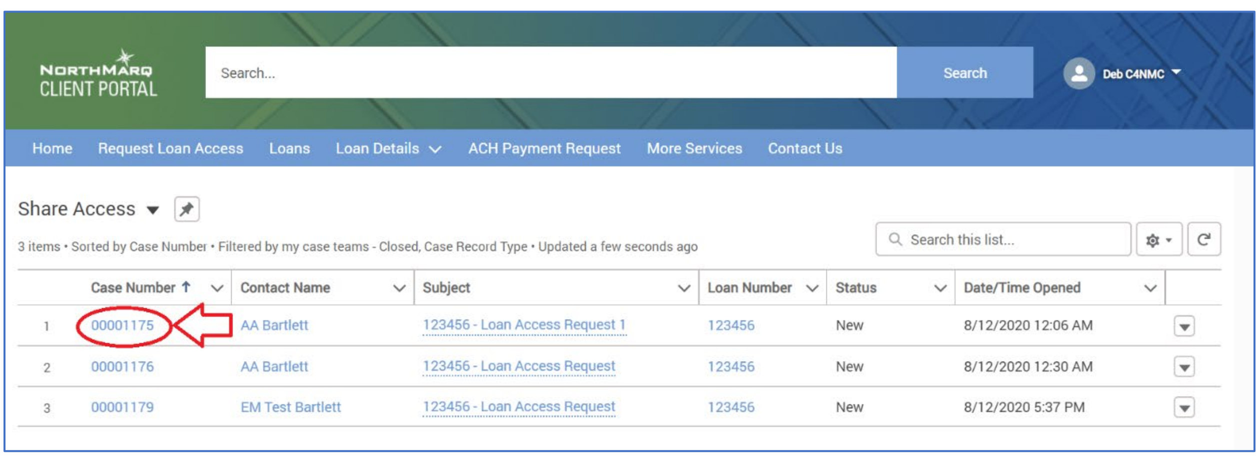
How to Grant/Deny Loan Access Requests as a Loan Administrator

Open loan access requests for which you are a Loan Administrator will appear in the lower right corner of the HOME page under "Share Access."

To view all of your open loan access requests, click the "View All" link.



From the Share Access screen, click the Case Number link.

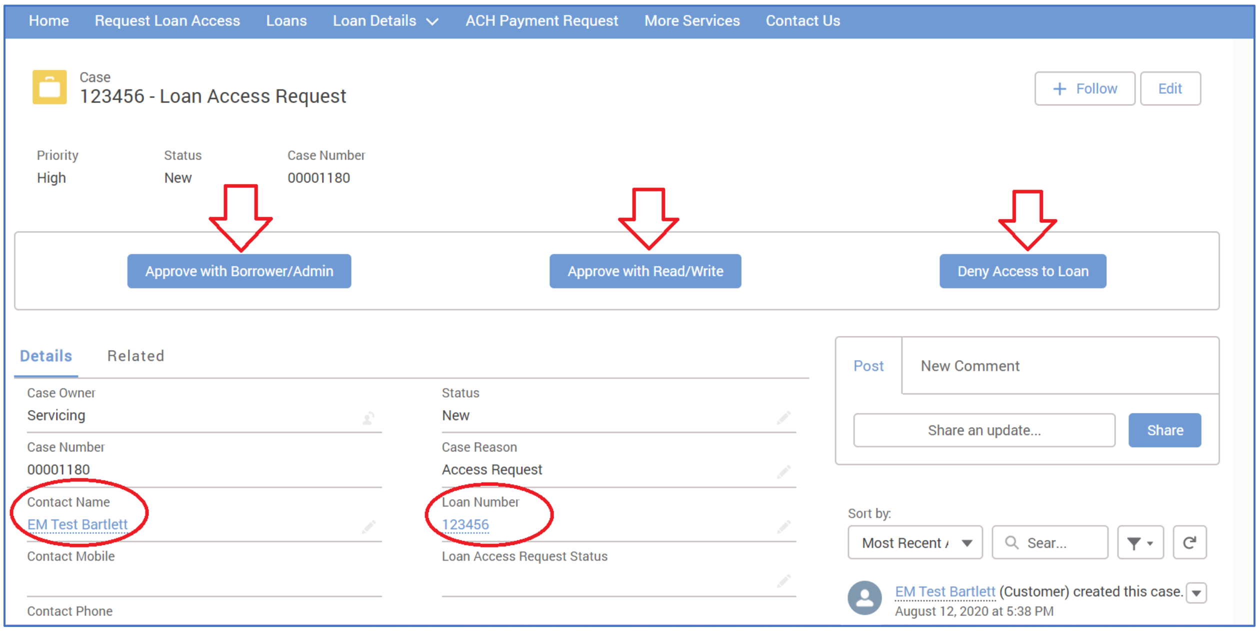


The Case Screen will appear. Click the Contact Name and/or the Loan Number to get additional information about the person requesting access or about the loan itself.

There are three permission levels for each loan access request:

1) Approve with Borrower/Admin = This option gives the requestor full access to the loan as well as giving him/her Loan Administration rights. With loan administration rights, the requestor can grant loan access to others, as well as modify and remove access.

2) Approve with Read/Write = This option gives the requestor access to the loan and the ability to view and upload documents for the loan.
3) Deny Access to Loan = The requestor will not be able to view any information about the loan, and it will not appear in his/her list of “My Loans.”



VIEW OR MODIFY LOAN ACCESS

To see all the people who have access to a given loan or to change someone’s access to a loan, select the loan number from the HOME page.

Click the Grant Access tab. A list will be displayed of each user’s access. The check mark to the right indicates each person’s level of access.

To change that access or remove loan access, click the appropriate button to the right of the person’s name.