Mortgage**Dashboard**™

BundleOne User Manual
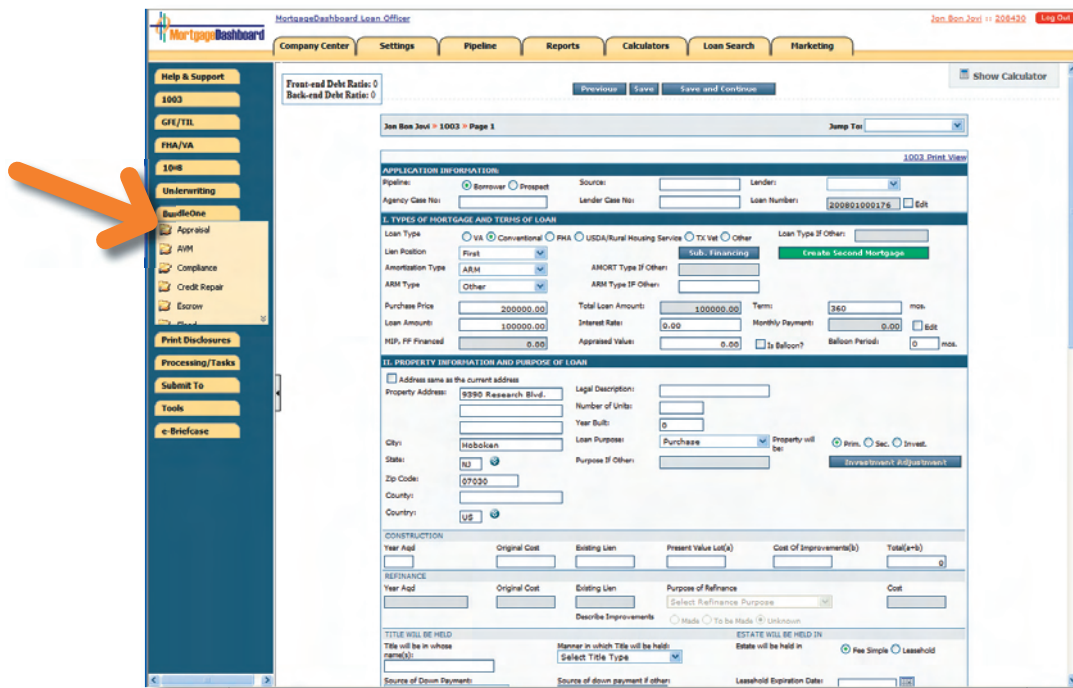
The BundleOne™ system is an easy-to-use platform included in your MortgageDashboard™ system. Bundle-One™ allows you to order, status and manage all of the services you need from one centralized location with the click of a button.

With BundleOne™ you can:

- Customize the platform with access to your favorite vendors.
- Select a vendor that is already provided or request a new one.
- Order and manage your services easily in a single area.
- See who ordered a service and view its status, no matter which user role you play.
- Have your appraisers and title companies upload the final product right into your file's BundleOne™.
- Cut down the time and cost to close a loan by no longer depending on outside networks, faxing and e-mails.
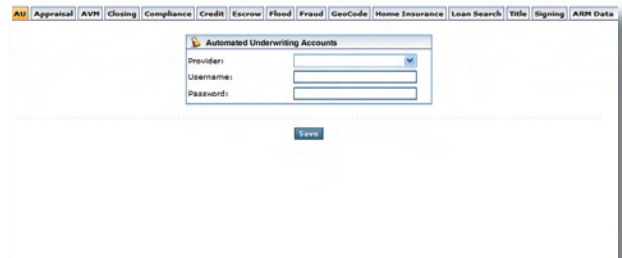
There are two ways to add a new vendor in MortgageDashboard™:

1. From the *Settings* section of your user account, go to **Vendors Accts** and select the link for *Request a New Vendor*.

2. Click **BundleOne** in your file, and select *Request New Vendor*.

Complete the form with the vendor's information and press **Submit**.

We will then contact your new vendor and request that they sign the platform agreement in order to be added to the system.

Once they have been integrated, we will notify you so that you can begin ordering your vendor's services right from inside your MortgageDashboard™.
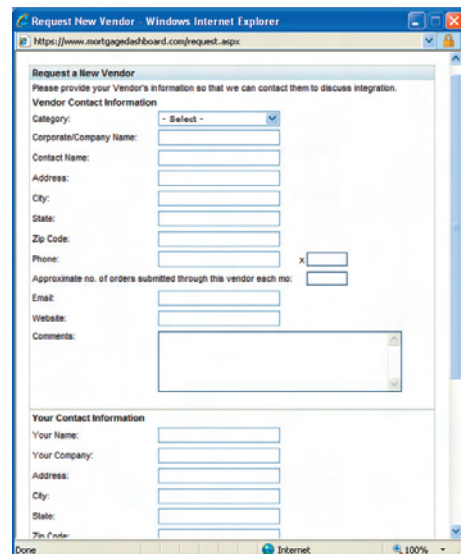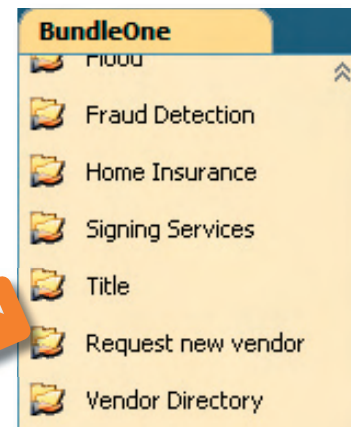
1. Click on

BundleOne inside of your file.

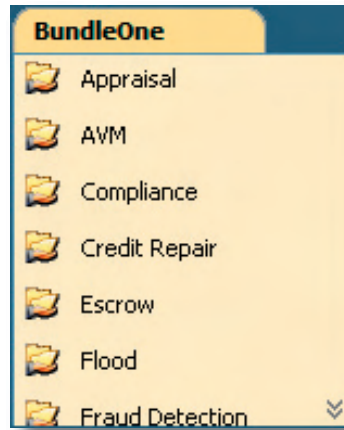2. Select the service you would like to order.

3. Click the *Order* button for the service.

4. Choose a provider from the drop-down menu, select a product and fill out the form.

5. Click the *Order* button at the top of the screen.

After ordering a service, it will appear on the status page. Once the vendor has updated the order in their service area, you will be able to see their comments, status items and the finished product.

Once a vendor uploads a file to BundleOne™, you may send the file to your e-Briefcase by selecting for the file.
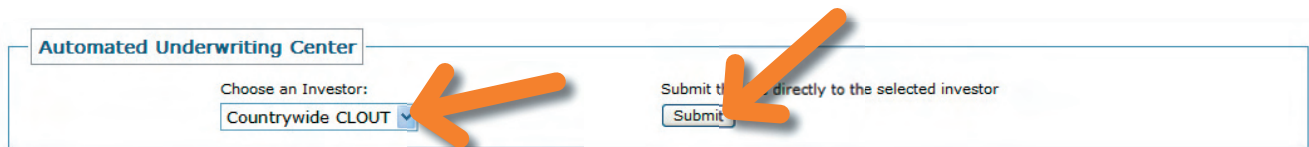
Automated Underwriting

To submit for automated underwriting, select **Underwriting** on the left while inside of a file.

Select an investor from the drop-down menu, and press **Submit**. When you select *Submit*, your file is automatically exported to the investor you chose in the drop-down.

Automated Underwriting Center

Choose an Investor:
Countrywide CLOUT

Submit the file directly to the selected investor
Submit

Lender's Portal

To access the Lender's Portal, select **Underwriting** on the left while inside of a file.

To export the file in FannieMae 3.2 format, select **Export**.

To manually submit the exported file to an investor via their Web site, select the investor from the drop-down menu and click **Open Website**. The Web site will open inside of MortgageDashboard™.

Please note: Selecting the *Export* button under *Export this file in FannieMae3.2 format* does not submit it automatically to the investor you choose in the drop-down on the left. You must first export it, then open the Web site for your chosen investor using the button on the left and then submit it to the site.

Lender's Portal

Choose an Investor:
Fifth Third
Open Website

Export this file in FannieMae 3.2 format
Export