

MortgageDashboard™

BundleOne User Manual

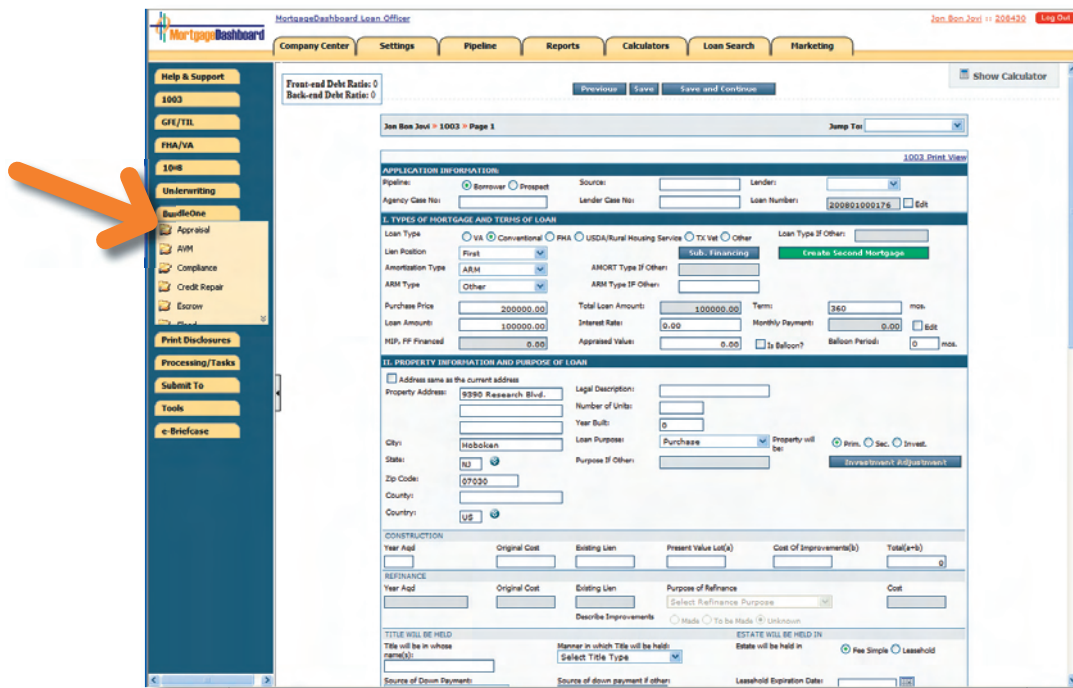
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The BundleOne™ system is an easy-to-use platform included in your MortgageDashboard™ system. BundleOne™ allows you to order, status and manage all of the services you need from one centralized location with the click of a button.



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.

Adding a New Vendor:

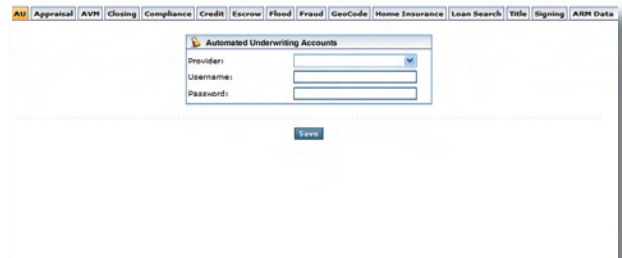
There are two ways to add a new vendor in MortgageDashboard™:

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™.



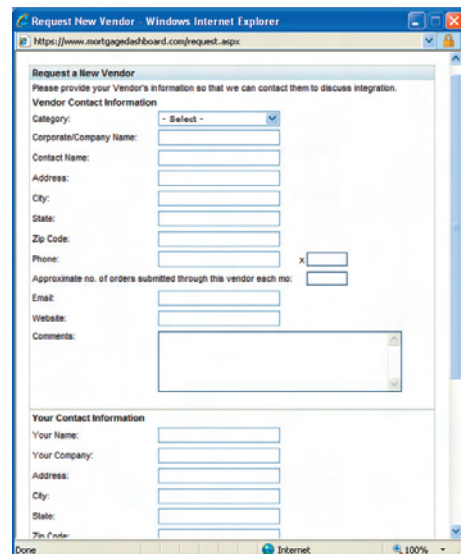
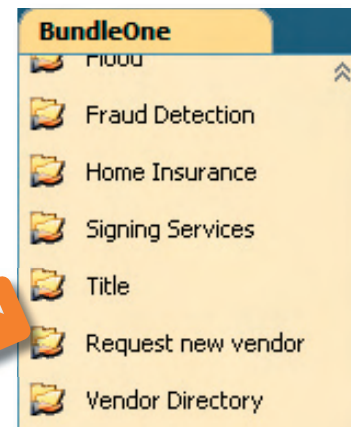
Automated Underwriting Accounts

Provider:

Username:

Password:

Save



Request a New Vendor - Windows Internet Explorer

https://www.mortgagedashboard.com/request.aspx

Request a New Vendor

Please provide your Vendor's information so that we can contact them to discuss integration.

Vendor Contact Information

Category:

Corporate/Company Name:

Contact Name:

Address:

City:

State:

Zip Code:

Phone: x

Approximate no. of orders submitted through this vendor each mo:

Email:

Website:

Comments:

Your Contact Information

Your Name:

Your Company:

Address:

City:

State:

Zip Code:

Ordering a Service:

1. Click on

BundleOne inside of your file.


2. Select the service you would like to order.

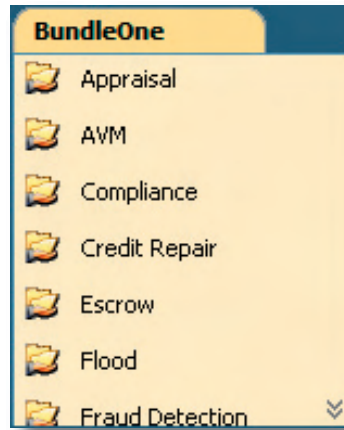
3. Click the *Order* button for the service.

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.



STATUS OF APPRAISAL ORDERS

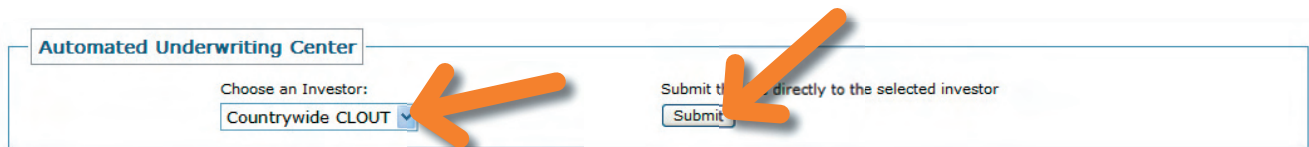
Order ID	Order Date	Vendor Name	Product Name	Status Date	Status Code	Description	File
170510_199A204	8/9/2007	Vuecentric Appraisal Test	2055 Exterior	8/9/2007		Ordered created	
170510_199A202	8/9/2007	Vuecentric Appraisal Test	Desk Review	9/13/2007	1001	Order Received	RestoredCompany.xls
170510_199A202	8/9/2007	Vuecentric Appraisal Test	Desk Review	11/15/2007	1010	Report delivery	AutumnLeaves.jpg
170510_199A202	8/9/2007	Vuecentric Appraisal Test	Desk Review	12/3/2007	1002	Order processing started	pointScheme.xml
170510_199A207	8/9/2007	Vuecentric Appraisal Test	Other	8/9/2007		Ordered created	
170510_199A200	8/16/2007	Vuecentric Appraisal Test	URAR (1004)	8/16/2007		Ordered created	
170510_199A200	8/16/2007	Vuecentric Appraisal Test	URAR (100-9)	12/1/2007	1001	Order Received	
170510_199A200	8/16/2007	Vuecentric Appraisal Test	URAR (100-9)	12/1/2007	1002	Thanks for your order.	
170510_199A200	8/16/2007	Vuecentric Appraisal Test	URAR (100-9)	12/1/2007	1005	Order processing started	
170510_199A200	8/16/2007	Vuecentric Appraisal Test	URAR (100-9)	12/1/2007	1010	Order processing complete	Appraisal.pdf

Underwriting Center:

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.



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.

