

# Submitting a TBD Loan (Purchases Only)

Open up your internet browser

Go to our website: [www.5thstcap.com](http://www.5thstcap.com)

Find and Click "Pipeline Login" on the top right



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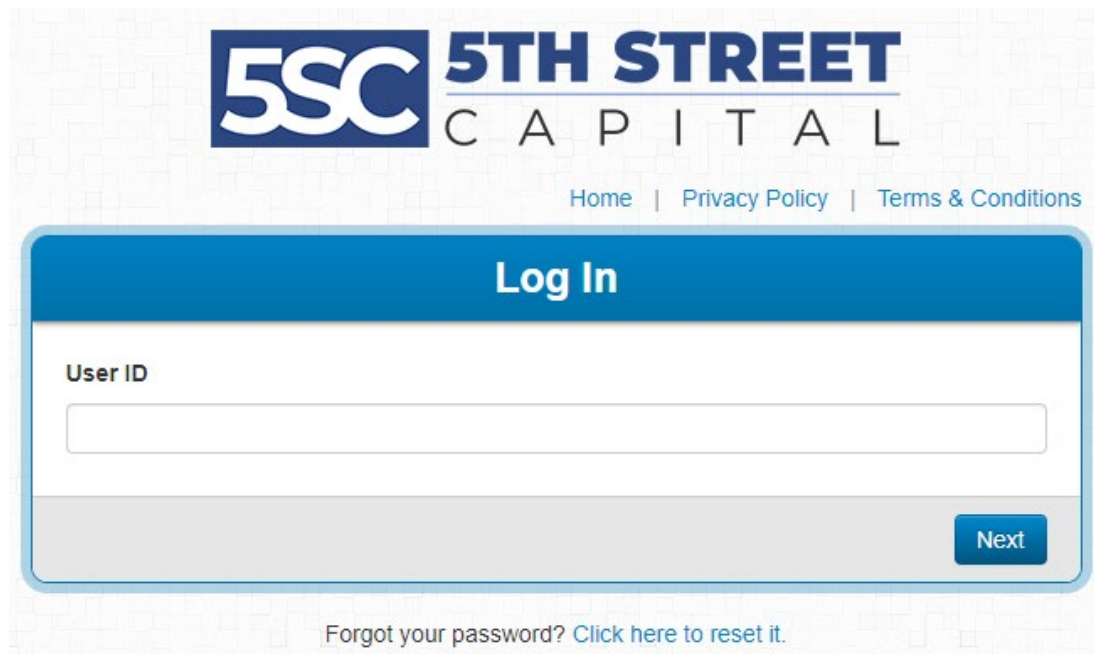


You will be redirected to our mortgage platform:

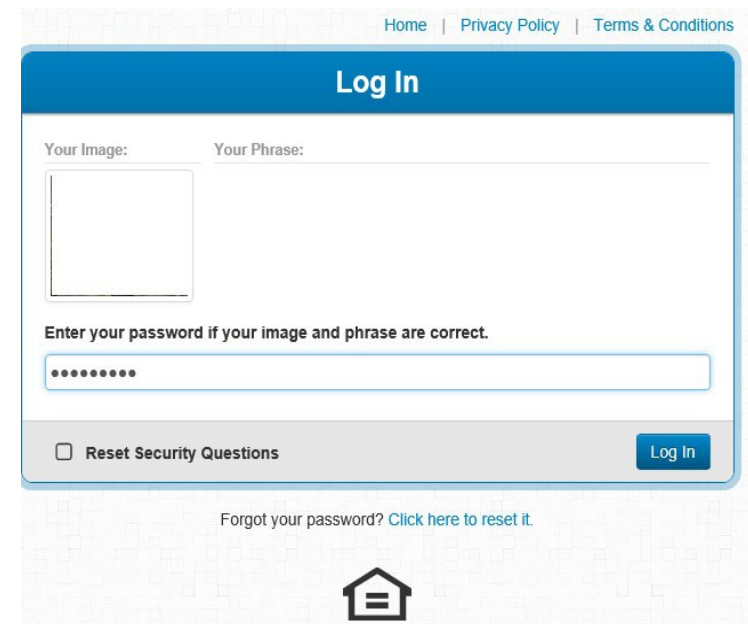
<https://5thstreetcapital.mortgagebotlos.com/Login>

Enter your User ID and click "Next" (If you do not have a User ID you can register on our website using the link below <http://5thstcap.com/resources/submitting-a-loan/registering-for-an-id-and-password/>)

Enter your password and click "Log in"



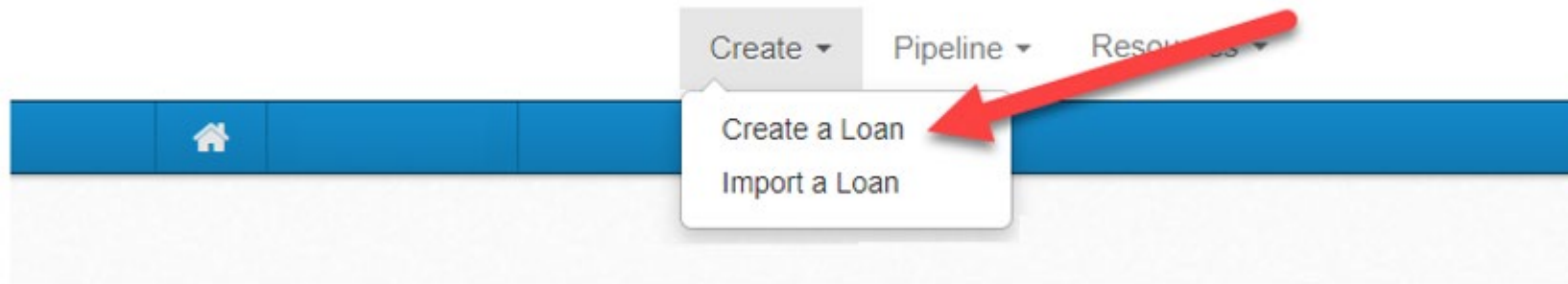
The screenshot shows the 5th Street Capital logo at the top left, with the text "5SC 5TH STREET CAPITAL" and navigation links "Home | Privacy Policy | Terms & Conditions". Below the logo is a blue "Log In" header. Underneath is a "User ID" label and a text input field. At the bottom right of the form is a blue "Next" button. Below the form, there is a link: "Forgot your password? [Click here to reset it.](#)"



The screenshot shows the 5th Street Capital logo at the top left, with the text "5SC 5TH STREET CAPITAL" and navigation links "Home | Privacy Policy | Terms & Conditions". Below the logo is a blue "Log In" header. Underneath are two fields: "Your Image:" with a square placeholder and "Your Phrase:" with a text input field. Below these is a password prompt: "Enter your password if your image and phrase are correct." followed by a password input field with masked characters. At the bottom left is a checkbox labeled "Reset Security Questions". At the bottom right is a blue "Log In" button. Below the form, there is a link: "Forgot your password? [Click here to reset it.](#)" and a home icon.

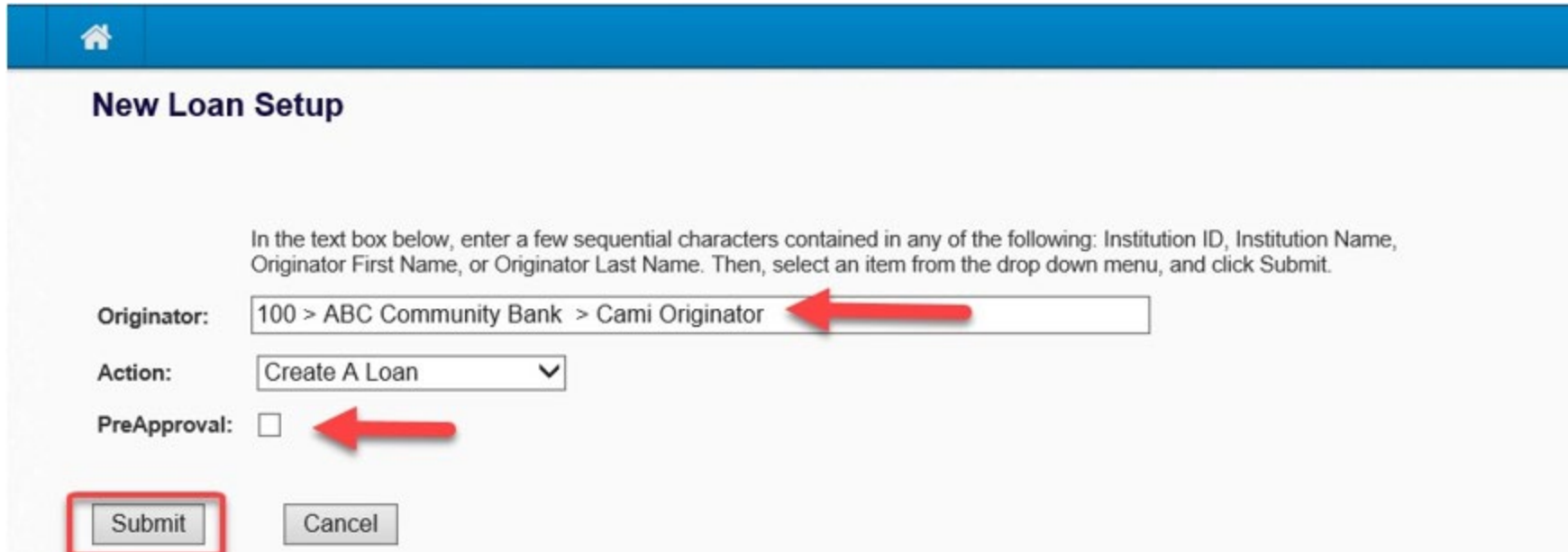
Click “Create”

Then Click “Create a loan”



See next slide for Creating a loan

Originator: Choose the Loan Officers name from the dropdown list  
Check the Box next to **Preapproval**  
Select Submit



The screenshot shows a web form titled "New Loan Setup" with a blue header bar containing a home icon. Below the title, there is a text box with the instruction: "In the text box below, enter a few sequential characters contained in any of the following: Institution ID, Institution Name, Originator First Name, or Originator Last Name. Then, select an item from the drop down menu, and click Submit." The form contains three main fields: "Originator:" with a text input containing "100 > ABC Community Bank > Cami Originator" and a red arrow pointing to the input; "Action:" with a dropdown menu showing "Create A Loan"; and "PreApproval:" with an unchecked checkbox and a red arrow pointing to it. At the bottom, there are two buttons: "Submit" (highlighted with a red box) and "Cancel".

**New Loan Setup**

In the text box below, enter a few sequential characters contained in any of the following: Institution ID, Institution Name, Originator First Name, or Originator Last Name. Then, select an item from the drop down menu, and click Submit.

Originator: 100 > ABC Community Bank > Cami Originator

Action: Create A Loan

PreApproval:

Submit Cancel

Fill out info in red (Name, Last name, SSN)

Under property information, Make sure the box for “Pre Approval” is checked

Enter City, State, County, and Zip if it is available at the time of submission

The screenshot shows a 'Property Information' form with the following fields and options:

- Same as Borrower's Present Address?** with radio buttons for 'Yes' and 'No'.
- PreApproval** checkbox, which is checked and highlighted with a red box. A red arrow points to this checkbox.
- Subject Property Address** text input field.
- Address Number**, **Address Street**, and **Address Unit** text input fields.
- City**, **State** (dropdown), and **County** (dropdown) fields.
- Zip** and **Zip Ext.** text input fields.

Under Loan Information enter the following:

- “Sales Price”
- “Appraised Value”
- “Product”
- “Base Loan Amount”

Select “Save/Close” when complete

Loan Information			
<b>Sales Price</b>	<b>Estimated Balance on Home</b>	<b>Property Type</b>	
\$1,000,000.00	\$0.00		
<b>Appraised Value</b> Same as Sales Price	<b>Approx. Mtg Payment</b>	<b>Property will be</b>	<b>Purpose of Loan</b>
\$1,000,000.00	\$0.00		
<b>Base Loan Amount</b>	<b>Is Employee Loan?</b>	<b>Product</b>	
\$500,000.00	<input type="radio"/> Yes <input checked="" type="radio"/> No	Non-Conforming 5/1 Libor Arm 5SCh	
<b>Financed FHA MIP or VAFF</b>	<b>LTV</b>	<b>Lien Type</b>	<b>Mortgage Applied For</b>
\$0.00	50.000%	First Mortgage	Conventional
<b>Total Loan Amount</b>	<b>CLTV</b>	<b>Number of Months</b>	<b>Rate</b>
\$500,000.00	50.000%	360	5.500%
<b>Down Payment</b>	<b>Subordinate Financing LIAB</b>		
50.000% % \$500,000.00	\$0.00		
<b>Subordinate Financing DOT</b>	<b>New First Mortgage Amount</b>	<b>Closing Costs from 2nd Lien</b>	<b>Application Date</b>
\$0.00	\$0.00	\$0.00	

## The loan Purpose will reflect “PreApproval”

Forms & Docs	<b>Application Criteria</b> <span>Hide</span>			
Doc Packages	<b>Application Date:</b>		<b>Property Address</b>	
Closing Docs	<b>Name</b> ✓		<b>Value of Property</b>	
Services	<b>Monthly Income</b>		<b>Loan Amount</b> ✓	
Status & Tracking	<b>Social Security Number</b> ✓			
Actions	<b>Loan Details</b> <span>Hide</span>			
Imaging	<b>Final:</b> 5/22/2019		<b>Product Code:</b> NCA51L N	
	<b>Loan Amount:</b> \$500,000.00		<b>Rate:</b>	
	<b>Loan Purpose:</b> PreApproval		<b>APR:</b> 0.000%	
	<b>Institution:</b> ABC Community Bank (100)		<b>P &amp; I:</b> \$0.00	
	<b>Loan Status:</b>		<b>PITI:</b> \$0.00	
	<b>AU Status:</b>		<b>Lock Status:</b> Not Locked	
	<b>Property Address:</b>		<b>Lock Expiration:</b>	
	SAN DIEGO, CA 92108		<b>Cash To Close:</b> \$500,000.00	
	<b>Appraised Value:</b> \$1,000,000.00		<b>Closing Date:</b>	

**\*Do not “Register” the loan it will trigger compliance alerts**



The 1003 must be completed except for Property Address before the loan is submitted to Underwriting

Clicks Forms & Docs > 1003

Complete all tabs and then save and close to proceed

<b>I. TERMS</b>	<b>II. PROPERTY</b>	<b>III. BORROWER</b>	<b>IV. EMPLOYMENT</b>	<b>V. INCOME, HOUSING</b>	<b>VI. ASSETS</b>	<b>VI. REO</b>
<b>VI. LIABILITIES</b>	<b>VII. TRANSACTION DETAILS</b>	<b>VIII. DECLARATIONS</b>	<b>IX. SIGNATURE</b>	<b>X. GOVERNMENT MONITORING</b>	<b>OTHER DATA</b>	<b>GOVERNMENT</b>

Proceed to upload documents to the loan.

- From the left side click 'Imaging' > 'Upload Document'
- Click the empty box to the right of 'File to Upload' or use the drag and drop feature 'Drop Files to Upload'
  - \*Users have the ability to drag and drop multiple documents at one time in the grey space and designate the document type to upload (see next slide)
- Locate the file(s) on your computer that you want to upload (make sure it is not password protected)
- Click the Arrow on right of 'Document Type' field and select the description that best matches what you are uploading
  - \*You must **choose a document type** for **EACH** document that you upload. If a document type is not selected, the document will not be uploaded to file even if you receive a successful upload message
- Appraisal uploads: Choose 'Full Color' under the first drop down "Color Handler" and select appraisal type under document type
- Click 'Submit' and repeat process until all your documents are uploaded

44612-1190 - Mario Hernandez

Type to filter...

Forms & Docs

Doc Packages

Services

Actions

Imaging

ImageFlow

Upload Document

Application Criteria		Hide	
Application Date:	12/11/2020	Property Address	✓
Name	✓	Value of Property	✓
Monthly Income	✓	Loan Amount	✓
Social Security Number	✓		

XDOC - Google Chrome

imageflow26566.mortgagebotios.com/xdoc/ui/kapps/fileUpload.aspx?AppLink=DOCUMENTUPLOAD&ProjectId=1000&ContainerKey=4245

Upload Loan Documents

loan

Files to Upload

File to upload: CPU.pdf

Color Handler: Black and White

Render Quality: Normal

Document Type: Closing Protection Letter

File to upload: Prelim.pdf

Color Handler: Black and White

Render Quality: Normal

Document Type: Preliminary Title Report

Drop Files to Upload...

Ratios Show

End of document