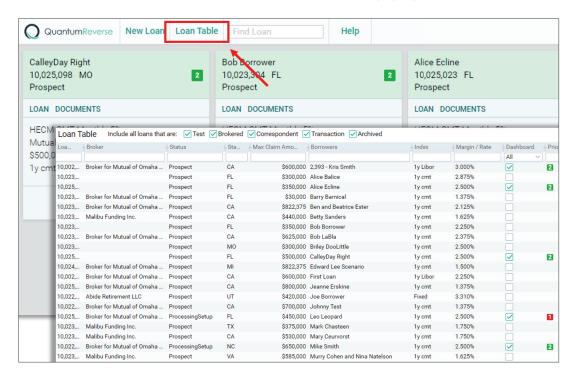
The Dashboard displays loan detail snapshot of each loan in your pipeline. These loans are recorded on a "Loan Card" shown below. The Dashboard is customizable to add or delete any loans.

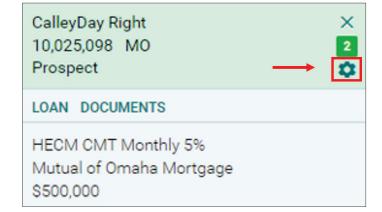
• To add a loan, click "Loan Table" and select from list in the pop-up window



To delete a loan from the Dashboard hover over green portion of Loan Card to show "X," then click on "X" (note: this does not delete the loan from system, only removes the selected Loan Card from view in the Dashboard).



- The details in the Loan Card on the Dashboard can be customize to the user specifications.
- Hover over green portion of Loan Card and click the widget to open pop-up window with all choices.

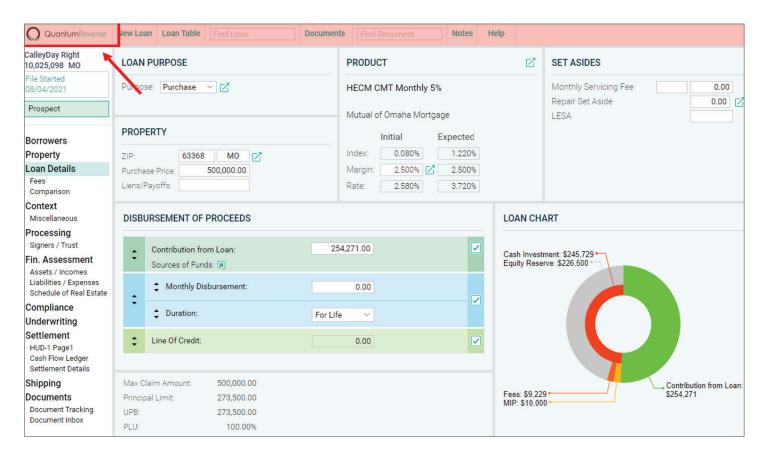




You can go directly to the loan or the documents by clicking "Loan" or "Documents" on the Loan Card.

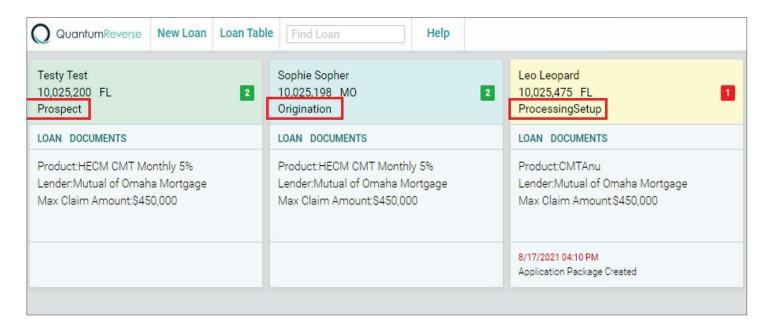


To return to the Dashboard, simply click "QuantumReverse" on the upper left of the loan.



The status of the loan will be indicated by the following:

- Prospect file has been started
- Origination Counseling Certificate has been uploaded
- Processing Setup application has been submitted



Additional Milestone Notifications

• Please note, when creating a Proposal the loan card will indicate "Prospect". Once the Counseling Certificate has been uploaded, it will change to "Origination".

| Milestone | Start | Actual Completion | Status |
|--------------------------------|---|---|-----------------|
| File Started | Manually | Manually | Prospect |
| Pre Approval | File Started Milestone Completed | Manually | Prospect |
| Counseling Certificate Date | Manually | Manually | Origination |
| Application Taken | Counseling Milestone Completed | Application Taken Date (Context Screen) | Origination |
| Application Docs Drawn | Application taken Milestone Completed | Creation of Application Package | ProcessingSetup |
| Setup | Application Docs Drawn Milestone Completed | Manually | Processing |
| Processing | Setup Milestone Completed | Manually | Underwriting |
| Conditional Approval | Adding Standard Conditions/ Processing Milestone Completed | UW status Approved | Closing |
| Adversed | Manually | UW Status Denied | Adversed |
| Clear to Close | Manually | Manually | Closing |
| Closing Docs Drawn | Clear to Close Milestone completed | Creation of Closing Package | Closing |
| Closing | Closing Docs Drawn Milestone Completed | Actual Closing Date | Funding |
| Funding | Closing Milestone Completed | Actual Funding Date | Post Closing |
| Post Closing | Closing Milestone Completed | Manually | Servicing |
| Servicing | Post Closing Closing Milestone Completed | Manually | Servicing |

