

PDIUM

As of 7.31.2025

DOMINION  FINANCIAL
WHOLESALE

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Click on the topic you want to review, and it will take you to that page.

PODIUM Platform Access

You can access the Podium platform several ways:

- Visit dominionfinancialwholesale.com and on our main page click on the “***Client Portal***” button in the upper right corner (example below)

OR

- Click the “***Client Portal***” button below:



Products ▼ Resources ▼ Company ▼

Partner With Dominion

Client Portal



Podium Login



[About](#) [Contact Us](#) [Login](#)

[Click here to Log In](#)

WELCOME TO
PODIUM

Dominion Financial Wholesale Partner Portal

Dominion Financial is excited to launch its new Wholesale Division after 22 years as a leader in direct-to-consumer investor residential lending. Here at Dominion Financial Wholesale, we know brokers account for more than a third of mortgage transactions annually, and we are eager to provide our investor residential lending solutions to this growing population of customers.

The Wholesale Division will specialize in offering both business-purpose investor residential as well as Non-QM solutions to brokers nationwide. Leveraging Dominion Financial's stellar reputation, proven lending expertise, and commitment to competitive rates, Dominion Financial Wholesale aims to stand out in the competitive Wholesale space. As a market price leader, Dominion Financial Wholesale is dedicated to providing best-in-class execution for its broker partners, particularly on investor residential "DSCR" loans where property cash flow drives approvals. By offering the most competitive rates, Dominion Financial Wholesale enables brokers to qualify their customers successfully. Become a partner today and discover why Dominion Financial Wholesale is where brokers come to WIN.

- Click on **“Click here to Log In”**
- On this screen you can also obtain:
 - **Important Emails**
 - **Current Turn Times** and

Important Emails

Help Desk

wholesalehelpdesk@thedominiogroup.com

Lock Desk

wholesalelockdesk@thedominiogroup.com

Scenario Questions

wholesalescenarioquestions@thedominiogroup.com

Income & Appraisal Review

wholesaleincomeandappraisalreview@thedominiogroup.com

UW Escalation

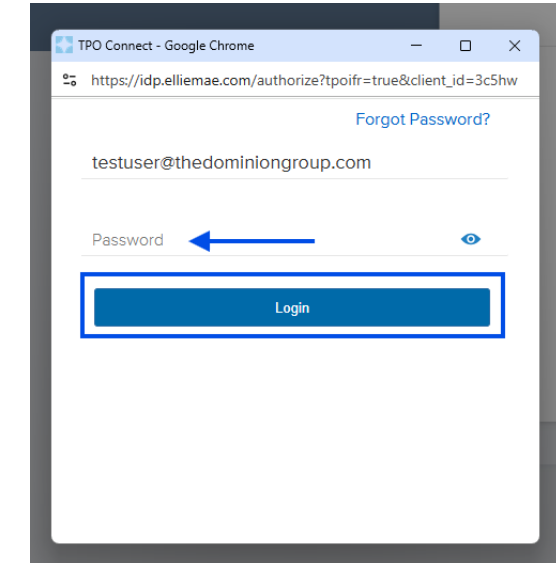
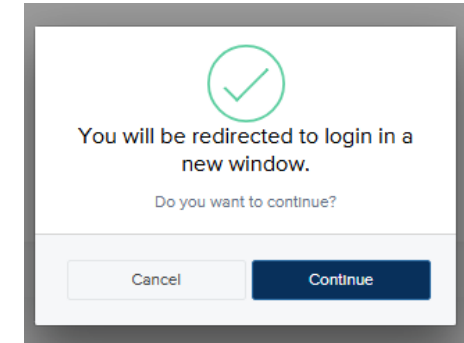
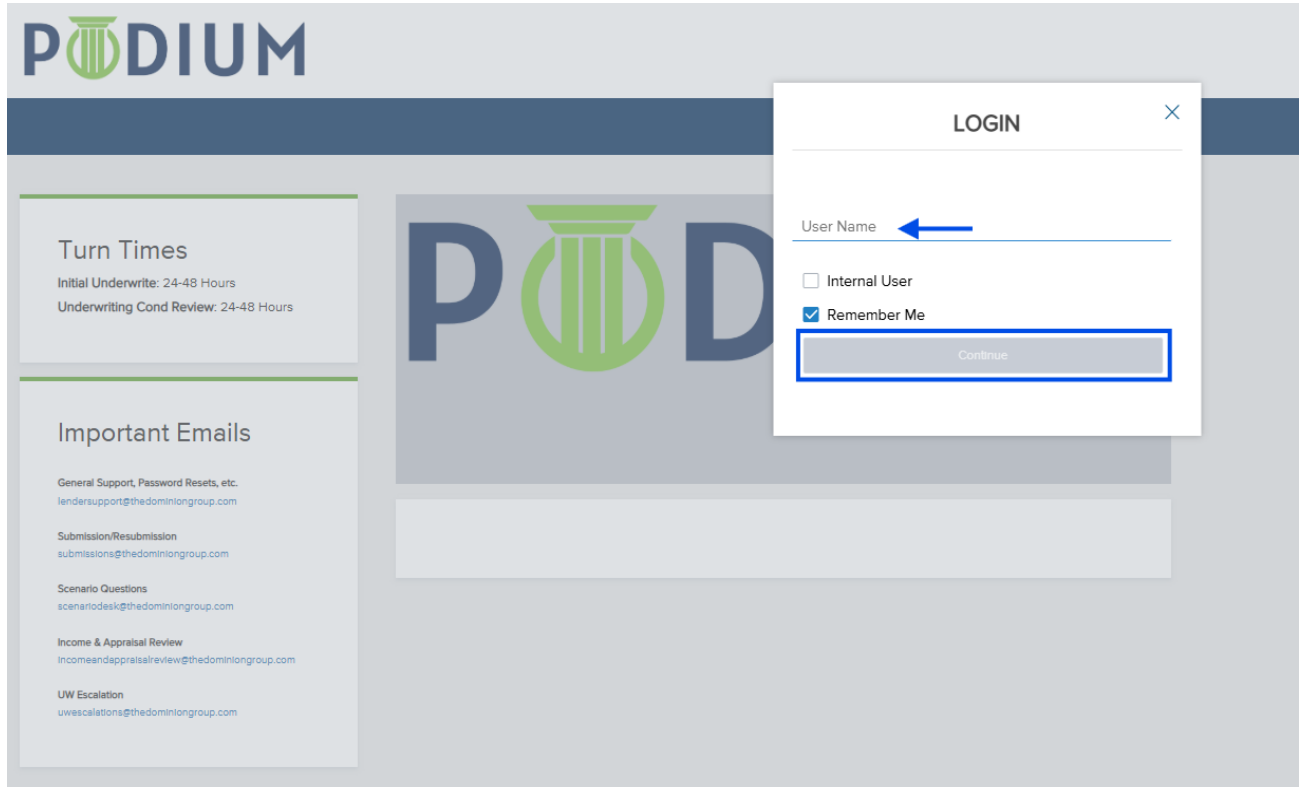
wholesaleuwescalations@thedominiogroup.com

Turn Times

Initial Underwrite: 24-48 Hours

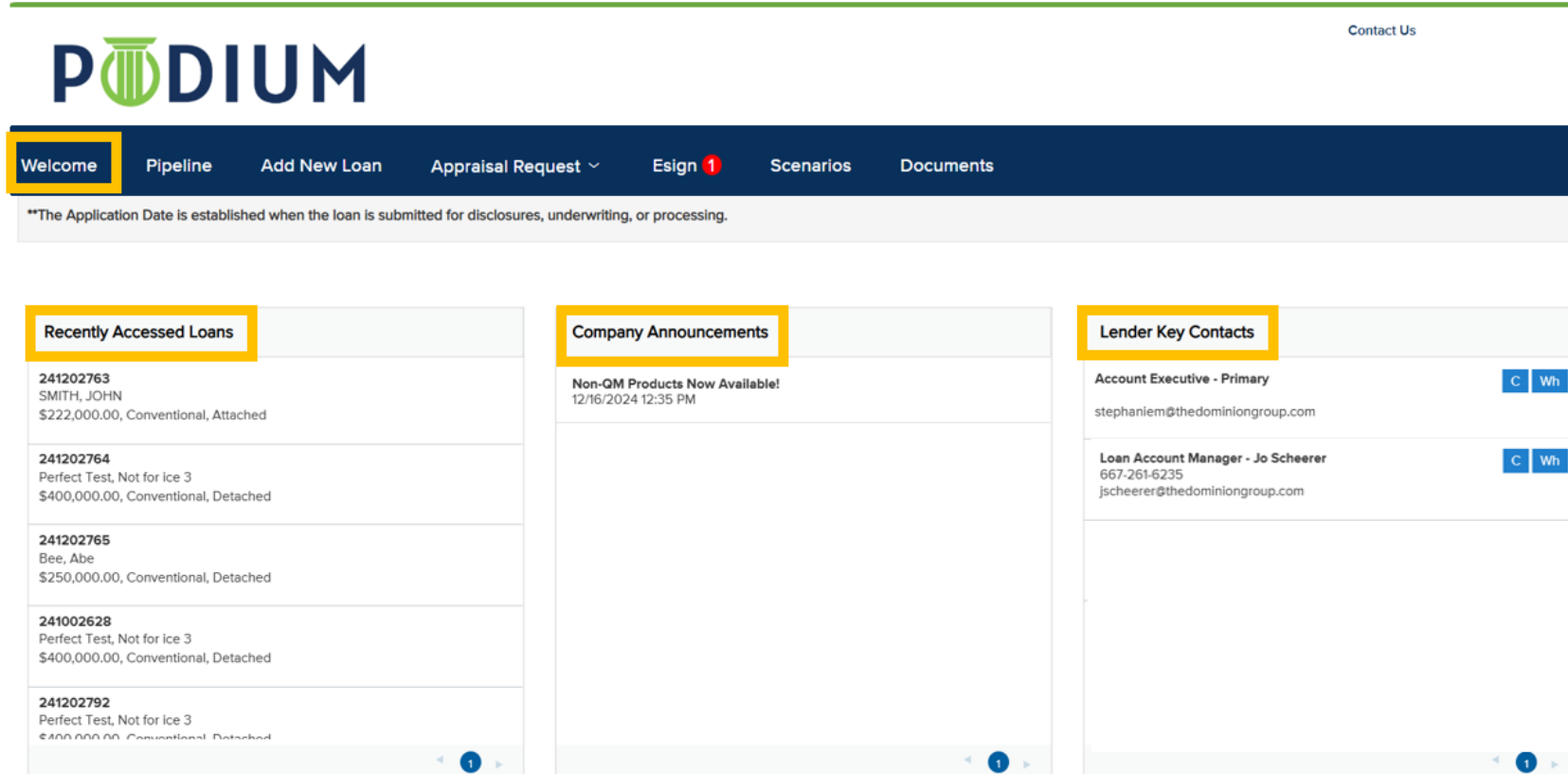
Underwriting Cond Review: 24-48 Hours

Login Screen Continued



- On the LOGIN pop-up, enter **your PODIUM UserName** (**do not** check Internal User), then click “**Continue**” **NOTE:** Use **.com credentials** for Business Purpose Loans/Investment Properties. Use **.TRID credentials** for Consumer Loans/Primary or Second Homes.
- On the next pop-up screen, press “**Continue**”
- A separate window will open, enter **your password**, then click “**Login**”

Welcome Screen



The screenshot shows the Podium Welcome Screen. At the top is the Podium logo and a 'Contact Us' link. Below is a dark blue navigation bar with tabs: 'Welcome' (highlighted with a yellow box), 'Pipeline', 'Add New Loan', 'Appraisal Request' (with a dropdown arrow), 'Esign' (with a red notification bubble containing the number 1), 'Scenarios', and 'Documents'. A light gray banner below the navigation bar contains the text: '**The Application Date is established when the loan is submitted for disclosures, underwriting, or processing.' Below this are three main content panels, each with a yellow header box. The 'Recently Accessed Loans' panel lists five loans with their IDs, names, and amounts. The 'Company Announcements' panel shows a single announcement about Non-QM products. The 'Lender Key Contacts' panel lists two contacts: an Account Executive and a Loan Account Manager, each with their role, name, phone number, email, and status buttons (C and Wh).

Podium

Contact Us

Welcome Pipeline Add New Loan Appraisal Request Esign 1 Scenarios Documents

**The Application Date is established when the loan is submitted for disclosures, underwriting, or processing.

Recently Accessed Loans

241202763 SMITH, JOHN \$222,000.00, Conventional, Attached
241202764 Perfect Test, Not for ice 3 \$400,000.00, Conventional, Detached
241202765 Bee, Abe \$250,000.00, Conventional, Detached
241002628 Perfect Test, Not for ice 3 \$400,000.00, Conventional, Detached
241202792 Perfect Test, Not for ice 3 \$400,000.00, Conventional, Detached

Company Announcements

Non-QM Products Now Available!
12/16/2024 12:35 PM

Lender Key Contacts

Account Executive - Primary stephaniem@thedominiongroup.com C Wh
Loan Account Manager - Jo Scheerer 667-261-6235 jscheerer@thedominiongroup.com C Wh

You will automatically be directed to the **Welcome** page. Here you will find:

- **Recently Accessed Loans** - Last 5 loans accessed
- **Company Announcements**
- **Lender Key Contacts** – Assigned **Account Executive** and **Loan Account Manager** information
- Click **Pipeline** on Top Blue Bar to review your entire pipeline.

Register/Add New Loan – Select Contacts

PODIUM

Welcome Pipeline **Add New Loan** Appraisal Request ▾ Esign 1 Scenarios Documents

Select Channel **Select Contacts** Loan Data Source

ROLE	CONTACT NAME	COMPANY NAME	EMAIL	CELL #	OFFICE #	FAX #
Originator Contacts						
Loan Officer				-	-	-
Loan Processor				-	-	-

Back Next

Add Loan Officer Contact

Loan Officer Company *
TPO Test Company 1 - Business

Loan Officer *
Select contact

TPO Test Company 1 - Business
Company

Loan Officer

Cell:
Office:
Fax:

Cancel Save

Add Loan Processor Contact

Loan Processor Company *
TPO Test Company 1 - Business

Loan Processor *
Select contact

TPO Test Company 1 - Business
Company

Loan Processor

Cell:
Office:
Fax:

Cancel Save

To Register/Add a new loan:

- Click **“Add New Loan”** on the top bar > in the **Select Contacts** section do the following:
 - To the right of **Loan Officer** Role click the **“Pencil Icon”**. Then on the **Add Loan Officer Contact** pop-up, in the **Loan Officer dropdown** select **your name**, then click **“Save”** at the bottom right.
 - To the right of **Loan Processor** Role click the **“Pencil Icon”**. Then on the **Add Loan Processor Contact** pop-up, in the **Loan Officer dropdown** select **your name**, then click **“Save”** at the bottom right.
 - Reach out to your Admin if names are not listed, they will be able to add them.
- NOTE:** Contacts entered here will receive all notifications on the loan.
- Then click the **“Next”** button at the bottom right of the screen.

Register/Add New Loan – Loan Data Source – Import 3.4 MISMO File

The screenshot shows the Podium web application interface. At the top is the Podium logo and a 'Contact Us' link. Below is a navigation bar with links: Welcome, Pipeline, Add New Loan, Appraisal Request, Esign (with a red '1' badge), Scenarios, and Documents. A progress indicator shows three steps: 'Select Channel' (completed), 'Select Contacts' (completed), and 'Loan Data Source' (active, indicated by a blue circle with the number 3). The main content area is titled 'Loan Data Source'. Under the 'Data Format' section, there are two radio buttons: 'Import Loan Data From ULAD / ILAD (MISMO 3.4) File' (which is selected and highlighted with a yellow box) and 'Manual'. Under the 'Upload' section, there is a 'Browse:' label followed by a button labeled 'LOCAL DRIVE' (highlighted with a yellow box). Below this is a large rectangular box with a cloud upload icon and the text 'Drop Files here to upload' (highlighted with a yellow box). Below the box, it says 'Supported: 1003, txt, xml'. At the bottom of the form, there is a red text note: 'Please Note: Downgrading a 3.4 file to a 2009 URLA may cause lost or inaccurate data.' At the bottom right, there are two buttons: 'Back' and 'Go to Register Loan Form' (highlighted with a yellow box).

To Import a 3.4 MISMO file do the following:

- In the **Data Format** section, make sure the click the *radial* next to **Import Loan Data From ULAD/ILAD (MISMO 3.4) File**
- Next in the **Upload** section, click “**LOCAL DRIVE**” to locate the file in your **File Explorer** folder or **drag the file** in the **Drop Files here to upload** box.
- Then click the “**Go to Register Loan Form**” button at the bottom right of the screen.

Register/Add New Loan – Loan Data Source – Manual Entry

Podium

Contact Us

Welcome Pipeline Add New Loan Appraisal Request Esign Scenarios Documents

Select Channel Select Contacts **3** Loan Data Source

Loan Data Source

Data Format

☐ Import Loan Data From ULAD / iLAD (MISMO 3.4) File

☒ Manual

Back Go to Register Loan Form

For enter data manually do the following:

- In the **Data Format** section, make sure the click the **radial** next to **Manual**
- Then click the **“Go to Register Loan Form”** button at the bottom right of the screen.

Quick Register – Manual Entry

Borrower and Property Information

Borrower First Name *	Street Address
Required Field	
Borrower Middle Name	Unit Type
	Select an Option
Borrower Last Name *	Unit Number
Required Field	
Suffix	City
Social Security Number	State *
	Select an Option
	Required Field
	Zip
	County
	Property Type
	Select an Option
	Number of Units
	Occupancy Type *
	Select an Option
	Required Field
	☐ FHA Secondary Residence

Loan Details

Decision FICO	Term Months
Lien Position	Due In
Base Loan Amount	Impound Waiver Type *
	Select an Option
	Required Field
Loan Type	Interest Only Months
Purpose of Loan *	LO Compensation Paid By
	☐ Borrower ☒ Lender
Required Field	
PMI Coverage	Lender Fee Waiver
	☐ Yes ☐ No
☐ Lender Paid Mortgage Insurance	
MI, MIP, FF Financed	
Total Loan Amount	
\$0	
Appraised Value	

- MISMO 3.4 upload will complete most of these fields
- For manual entry input the fields on the **Quick Register** screens.
- Click the **Register** button at the bottom of the 2nd screen once completed.

Required Fields

- Required information will display in the **Error Details** pop-up > complete the **FIELD sections** > once all completed, click the **Save** button at the bottom right.

Error Details

FIELD ID	REQUIRED FIELD NAME	FIELD
CX.CREDIT....	Credit Report By	Select an Option
CX.INCOME....	Income Documentation Type	✓ Select an Option
763	Estimated Closing Date	Broker
608	Amortization Type	Dominion - DFW
CX.LOI.GFE....	LOI or GFE Selection	Select an Option

Cancel Save

- If the **Credit Report By** field is listed- select **Broker** if you pulled credit & will **re-issue** it or select **Dominion – DFW** if you want us to pull credit (must have a **signed Credit Authorization** and **upload** it to **PODIUM**)

Error Details

FIELD ID	REQUIRED FIELD NAME	FIELD
763	Estimated Closing Date	MM / DD / YYYY
608	Amortization Type	
CX.INCOME....	Income Documentation Type	Select an Option
2293	Impound Waiver Type	Select an Option
14	State	Select an Option

Cancel Save

Error Details

FIELD ID	REQUIRED FIELD NAME	FIELD
CX.LOI.GFE....	LOI or GFE Selection	Select an Option
763	Estimated Closing Date	✓ Select an Option
		LOI
		GFE

Save

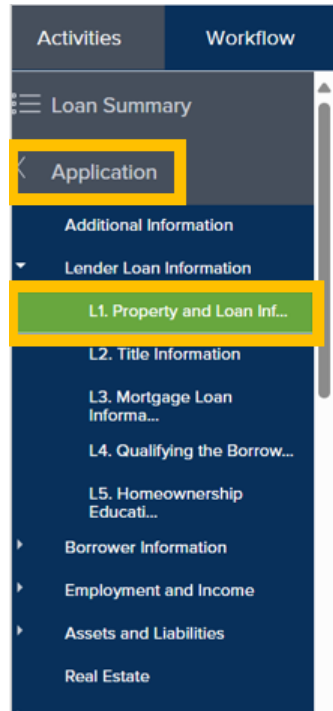
- Business Purpose (Investment) loans **only**, if the **REQUIRED FIELD LOI or GFE Selection** is listed > select **LOI** or **GFE**

Loan Tracker

The screenshot displays the Loan Tracker interface. At the top, a dark blue navigation bar contains links: Welcome, Pipeline (highlighted with an orange box), Add New Loan, Appraisal Request (with a dropdown arrow), Esign, and Scenarios. Below this, the user's name 'JOHN SMITH' and address '125 ANYTOWN STREET, Baltimore, MD, 21202' are shown. To the right, loan details are listed: Loan #: 241202763, Total Loan Am... \$222,000.00, Loan Type: Conventional, Loan Purpose: Cash-Out Refinance, Interest Rate: 8.875%, LTV/Comb Lo... 66.67% / 66.67%, and a 'Started' status with 'Wh' and '1st' buttons. A central workflow diagram, highlighted with an orange box, shows five steps: 1. Registration (with a checkmark), 2. Submission (highlighted with an orange box), 3. Condition Approval, 4. Clear to Close, and 5. Funding. On the left, a sidebar menu includes 'Activities', 'Workflow', 'Loan Summary' (highlighted with an orange box), and 'Application'.

- Congratulations! Your loan is now **Registered**, and you are now on the **Loan Summary** page.
- The **Loan Tracker** is displayed in the middle of the main page.
 - **Remains visible** as you move through the page options.
 - Quick way to **view your loan's status**.
 - As each stage is completed, the **number updates** to a **check mark**.
- Click on **Loan Summary** on the left of the screen, to begin reviewing/completing the **Loan Application** screens.
- You can access any of your loans by clicking on **Pipeline** on the top bar.

Loan Application



Application / Lender Loan Information

- **Application** – add, edit, delete data
- **Next** button – move to each page without losing data entered
- **Save** button – saves data
- When prompted - **Save information** to the loan file

❖ **Important** - Review and ensure the L1. Property and Lender Loan Information screen is **fully completed and accurate** as possible.

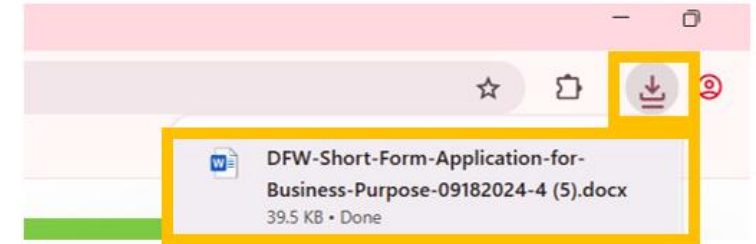
❖ **MISMIO 3.4 Clients** click [HERE](#) to go to Order/Re-issue Credit

❖ **Data Entry Only Clients** click [HERE](#) for Application and Order Credit Instructions

❖ **DFS Orders Credit Clients** click [HERE](#) to go to Order Credit Instructions

Loan Application – Data Entry Clients Only

- Click **Dominion Financial Loan Application Form** to download the application to your computer for completion (ensure Subject Property information is fully complete and accurate as possible). The form will **download** to your computer. In the upper right corner of the website click this  **icon** & then click **DFW – Short-Form-Application-for-Business-Purpose-09182024-4 (5).docx** the document will open in **Word** for you to **complete & save** to your computer.



or

- go to our website at www.dominionfinancialwholesale.com > click **Resources** at the top of the page > in the dropdown, click **Broker Resources** > below **Downloadable Resources** click + **Checklists & Forms** > click the **Dominion Financial Loan Application** button. The form will **download** to your computer. In the upper right corner of the website click this  **icon** & then click **DFW – Short-Form-Application-for-Business-Purpose-09182024-4 (5).docx** the document will open in **Word** for you to **complete & save** to your computer.
- If you prefer DFW enter the application data for you, click **HERE** to move to the next step. *** Note: Your profile must be set up in advance in Podium to access this service.**

Business Purpose Only Application

BORROWER INFORMATION				
Individual Name:	Closing As:		Individual	Entity
Entity Name:				State:
Entity Type:	LLC	Corporation	Partnership	Trust
				Good Standing? Yes No

- ❖ **Note:** You can **manually enter the data** yourself by completing all the **Application** screens to expedite the process. Click **HERE** to go back to slide 14 for information.
- ❖ **Important** - If you do manually enter the information **ensure** the **L1. Property and Lender Loan Information** screen is **fully completed and accurate** as possible.

Loan Documents – Data Entry or DFW Ordering Credit

For Data Entry – If you prefer to have DFW complete the Application data entry, your profile must be set up for this option in advance.

- **Uploading Documents-** On the **Activities** Menu, click **Loan Documents**
 - **Data Entry Only Clients – Upload Application** to the **LOAN SUBMISSION OR CONDITION DOCS** line by either **drag & dropping** it to **Drag & Drop file here** or clicking the **Browse for files** button and **locate application** on your computer
 - **DFW Ordering Credit – Upload Signed Credit Report Authorization** to the **CREDIT REPORT AUTHORIZATION** line by either **drag & dropping** it to **Drag & Drop file here** or clicking the **Browse for files** button and **locate application** on your computer

Additional Information – Data Entry Request OR DFW Ordering Credit



Contact Us Tammy Robinson

TPO Contacts Welcome Pipeline Add New Loan Appraisal Request Esign Scenarios Documents

Test Donald Test Duck

TX
TPO Test Company 1 - Business

Loan #: 250402948
Total Loan Am... \$0.00
Loan Type: Conventional
Loan Purpose: Purchase
Interest Rate: 0.000%
LTV/Comb Lo... 0.00% / 0.00%
Started Wh

Activities Workflow

Loan Summary

Application

Additional Information

Lender Loan Information

Borrower Information

Employment and Income

Assets and Liabilities

Real Estate

Loan and Property Informa...

Information for Governmen...

URLA Continuation

Order/Reissue Credit

Product & Pricing



Additional Information

Select Borrower Pair
Test Donald Test Duck

Save

Next

Specialty Fields

Income Documentation Type
DSCR - Individual

LOI or GFE Selection
GFE

Data Entry Request (Application)
Yes

Data Entry Request Completed
MM / DD / YYYY

Trans Details Loan Program

Specialty Products
Non-QM Individual DSCR

Borrower First-Time Homebuyer?
Select an Option

Property Type
Select an Option

☐ Foreign National Flag

Credit Report By
Dominion - DFW

1. **Data Entry Application Clients Only -**
On the **Activities** Menu, click **Application** > then on the expanded section click **Additional Information**.

- In the **Specialty Fields** section, click the **Data Entry Request (Application)** dropdown, select **Yes** > click the **Save** button
- Disclosure Desk** receives **auto-notification** and **inputs data points** from application to **PODIUM**
- Client receives **email notification** once data entry is complete.

2. **DFW Ordering Credit -** In the **Credit Report By** dropdown, click **Dominion - DFW** > then click the **Save** button.

- Automatic notification** is sent to the **Disclosure Desk** to **pull credit**
- After **credit** is **pulled and uploaded** to **PODIUM**, an **email notification** is sent to **Broker**

Return to Table of Contents

Additional Information – Data Entry Request / Credit Report by Dominion - DFW

- 1. Data Entry Clients Only & DFW Ordering Credit** – You must wait to *receive the emails* indicating the **application** and **credit report** have been *completed* and *uploaded* to **PODIUM**. Once you have *received BOTH email notifications*, click [HERE](#) to complete the next steps.
- 2. DFW Ordering Credit Clients** - You must wait to *receive the email* indicating the **credit report** has been *pulled* and *uploaded* to **PODIUM**. Once you have *received the email notification*, click [HERE](#) to complete the next steps.

❖ **Loan cannot be disclosed** until the **Data Entry** and/or the **Credit report** has been *pulled* and *both*, if applicable, are *complete* and *uploaded*.

Order/Re-Issue Credit

Peter Cottontail
NV,
TPO Test Company 1 - Business

Loan #: 250302903
Total Loan Am.: \$0.00

Loan Type: Conventional
Loan Purpose: Purchase

Interest Rate: 0.000%
LTV/Comb Lo.: 0.00% / 0.00%

Started Wh

Activities Workflow

Order/Relssue Credit

Order Credit

AUS Preference
No Preference

Order Credit

1
Order Credit Report

1 You must order credit for Peter Cottontail before AUS order can be placed.

Credit Details

Borrower Pair
Peter Cottontail

Credit Provider
CIS by Xactus

3
Re-issue Credit

Reference Number
1234

Report Details

Request Type
Individual

Report Type
Merge

Provider Details

User Name
Trobinson

Password

BranchID
BranchID

Save Login Information

Re-issue Credit

IMPORT LIABILITIES

- From the **Activities** Menu, click **Order/Re-Issue Credit** > then click the **Order Credit** button
- On the **Order Credit Report** pop-up, complete the following:
 - Borrower Pair** dropdown –select the **borrower** to re-issue/import credit. If additional borrowers are on the loan, **return & select any additional borrowers** to re-issue credit for them
 - Credit Provider** dropdown – select **your credit company's provider**
 - Re-issue Credit** – ensure the **radial to the left is selected**.
 - Reference Number** – Enter the **credit report reference number** from **your credit report** you're importing
 - Request Type** dropdown – Select to **Joint** or **Individual**
 - Report Type** dropdown – always select **Merge**
 - Provider Details** section – Enter **your credentials** for your credit vendor
 - Request Re-Issue** – click the **Re-Issue Credit** button at the bottom right.

Product and Pricing



A screenshot of the LOANPASS web application interface. The top navigation bar is dark blue with links: Welcome, Pipeline, Add New Loan, Appraisal Request (with a dropdown arrow), Esign (with a red circle containing the number 1), Scenarios, and Documents. Below this, a user profile section for Peter Cottontail (NV, TPO Test Company 1 - Business) is shown on the left, and loan details on the right: Loan #: 250302903, Total Loan Am...: \$0.00, Loan Type: Conventional, Loan Purpose: Purchase, Interest Rate: 0.000%, LTV/Comb Lo...: 0.00% / 0.00%, and a Started button with a lock, mail, and user icon. The main content area has a left sidebar with 'Activities' and 'Workflow' tabs. Under 'Activities', a list includes Loan Summary, Application, Order/Relssue Credit, Product & Pricing (highlighted with a yellow box and a green circle with the number 1), and Fees and Disclosure Request. The main content area is titled 'Product & Pricing | 2 Service' and contains a 'Category' dropdown with options 'Closing Fees' and 'Product and Pricing' (the latter is crossed out with a large red X). In the top right corner of the main content area, there is an 'ORDER SERVICE' button highlighted with a yellow box and a green circle with the number 2.

1. From the **Activities** Menu, click **Product & Pricing**.
2. Then click the **ORDER SERVICE** button

Product and Pricing - Order Service

The screenshot shows a software interface with a sidebar on the left containing a list of activities: Loan Summary, Application, Order/Relssue Credit, Product & Pricing (highlighted), Fees and Disclosure Request, Loan Documents, and UW Conditions. The main area displays the 'Product & Pricing' workflow. A pop-up window titled 'Order Service' is open, showing two columns: 'Categories' and 'Providers'. In the 'Categories' column, 'Product and Pricing' is selected and highlighted with a green circle '1'. In the 'Providers' column, 'LoanPASS' is selected and highlighted with a green circle '2'. At the bottom right of the pop-up, a 'Next' button is highlighted with a green circle '3'.

1. On the **Order Service** pop-up, click **Product & Pricing**.
2. Click **LoanPASS**
3. Then click the **Next** button

Product & Pricing - LoanPASS Login

The screenshot shows a web application interface for LoanPASS. On the left is a sidebar with a 'Workflow' tab. Under 'Workflow', there are several menu items: 'Loan Summary', 'Application', 'Order/Reissue Credit', 'Product & Pricing' (which is highlighted), 'Fees and Disclosure Request. *Must Enter Est Appraised Value Before Proceeding*', 'Loan Documents', and 'UW Conditions **For Underwriter to Review Conditions, Click UW or Processing Submissions then Click Resubmit.' The main content area displays a 'Log in to order service' form. The form has a title 'Log in to order service' and a note 'These credentials will be saved for future use.' Below this are three input fields: 'Client Access ID' (containing 'dominionwholesale'), 'Email Address', and 'Password'. The 'Submit' button is highlighted with a yellow border. There are also 'Close' and 'Cancel' buttons at the top of the sidebar.

- For **Client ID** - enter *dominionwholesale*
 - For **Email Address** – enter *your email address*
 - For **Password** – enter the *password you created for LoanPASS*
 - Click the **Submit** button
- ❖ **Credentials** – only need to be entered the first time in PODIUM

Product and Pricing - Input/Product Selection

Step 1

Step 2

- In the **1st column** - complete any remaining **required fields** to receive eligible product and pricing results.
- In the **2nd column** – under each product to the right **Next Field** click on the **field name in blue** & it will take you to the **field to complete**. This field will update until eligible products and pricing results are received.

Step 2

- Once the **Approved** products appear, click on the **Product Name** to select it for the loan.

Submit Float or Submit Lock Request

Activities Workflow

DOMINION FINANCIAL WHOLESALE

Cottontail
Created by: Tammy Robinson

Initial Scenario From Encompass ★ Add Scenario Exit Pipeline Record

Next Field Load Scenario

Optional Fields

Desired Amortization Type
Fixed

Interest Only
No

Number of Financed Properties
5

Locking

Desired Rate Lock Period
30 Days

Lock Extension
day(s)

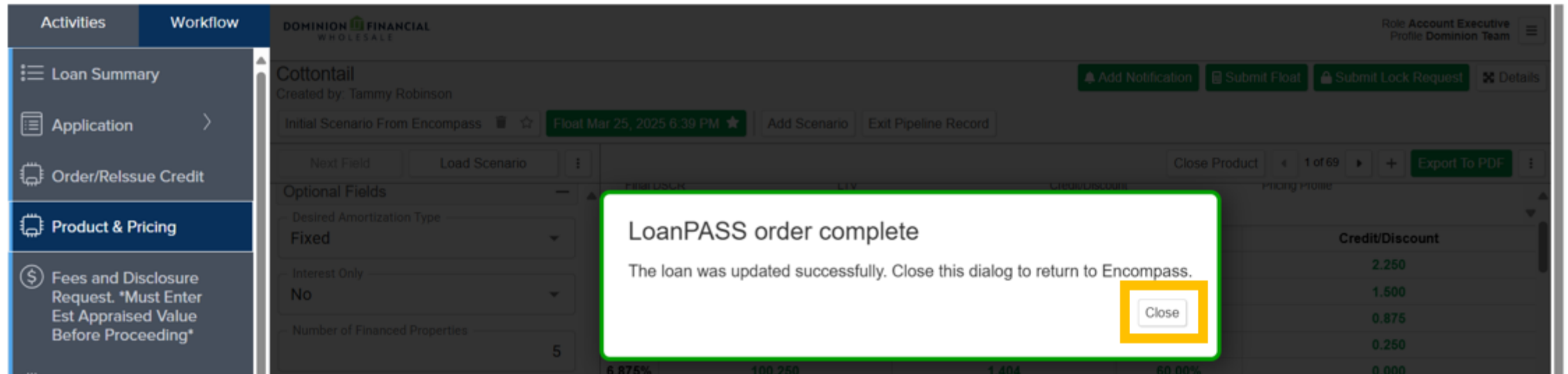
Close Product 1 of 69 + Export To PDF

Current	30 days	Final DSCR	LTV	Credit/Discount
6.375%	97.750	1.472	60.00%	2.250
6.500%	98.500	1.454	60.00%	1.500
6.625%	99.125	1.437	60.00%	0.875
6.750%	99.750	1.420	60.00%	0.250
6.875%	100.250	1.404	60.00%	0.000
7.000%	100.750	1.387	60.00%	0.000
7.125%	X	1.371	60.00%	0.000
7.250%	X	1.356	60.00%	0.000
7.375%	X	1.340	60.00%	0.000
7.500%	X	1.325	60.00%	0.000
7.625%	X	1.310	60.00%	0.000

Role Account Executive
Profile Dominion Team

1. In the **Days column** – go to the rate and desired price and click on the price.
2. Then click either the **Submit Float** button or the **Submit Lock Request** button.
3. Click the **Export To PDF** button, to **print the selected scenario** for your file or to present to a client.

Product and Pricing Order Complete



- Click the **Close** button
- ❖ **Float or Lock Request - LoanPASS print out auto-populates** to the "Product and Pricing" folder under the "Loan Documents" tab

Fees and Disclosure Request – Non-TRID Loans

Instructions for *Non-TRID Loans: Business Purpose (Investment Property)*

From the **Activities** Menu, click **Fees and Disclosure Request**

In Section **A. Origination Charges**, enter the **Broker Fees amount**

In Section **B. Services You Cannot Shop For**, complete the following, if applicable:

1. If collecting a **Broker Processing Fee**, go the **Broker Processing Fee Line**
2. If using a **third-party processing co.**, in the **Paid to Name** column, **enter the name of the company**.
3. In the **Amount** column, enter the **fee amount**

Once all fees are completed, click the **Save** button > then click the **Request Loan Estimate** button to **request the GFE or LOI**

- All **Fees** will be **greyed out** once **Request Loan Estimate** button is selected.
- If **GFE** is **not requested** before loan submission, **disclosure request** will be sent simultaneously with the submission

Activities Workflow

Loan Summary

Application

Order/Release Credit

Product & Pricing

Fees and Disclosure Request. "Must Enter Est Appraised Value Before Proceeding"

Fees and Disclosure Request. "Must Enter Est Appraised Value Before Proceeding"

Loan Documents

UW Conditions "For Underwriter to Review Conditions, Click UW or Processing Submissions then Click Resubmit."

Fees and Disclosure Request. "Must Enter Est Appraised Value Before Proceeding"

Complete Product and Pricing to access the Title Fees Request button and to Request Disclosures.

Click the Loan Estimate button to request an LE or a GFE.

Request Loan Estimate Save

A. Origination Charges

Total: \$1,649.00

Loan Origination Fees % or \$

Application Fees \$

Processing Fees \$

Underwriting Fees \$1,649.00

Borrower Paid Compensation Lender Paid Compensation

Origination/Discount Points

Broker Fees % \$

Yield Spread Prem. \$

B. Services You Cannot Shop For

Total: \$1,702.48

	Paid To Name	Amount
Appraisal Fee		\$750.00
Credit Report Fee		\$90.78
Tax Service Fee	Corelogic	\$82.00
Flood Certification Fee	Corelogic	\$12.50
VA Funding Fee		\$
Processing Fee		\$
Doc Preparation Fee	Grogg & Valby	\$425.00
MERS® Registration Fee	Dominion Financial Services, LLC	\$24.95
Fraud Report		\$33.00
Social Security Verification	Xactus	\$13.25
Appraisal Review Fee		\$120.00
Entity Review Fee	Grogg and Valby	\$150.00
Broker Processing Fee		\$

❖ If requesting an LOI, review the next two pages.
If not, click [HERE](#) to go to next steps.

Request LOI – Enter Date

Activities Workflow

Loan Summary

Application

Additional Information

Lender Loan Information

Borrower Information

Employment and Income

Assets and Liabilities

Real Estate

Loan and Property Informa...

Information for Governmen...

URLA Continuation

Order/Relssue Credit

Product & Pricing

Fees and Disclosure Request. *Must Enter Est Appraised Value Before Proceeding*

Registration Submission Condition Approval Clear to Close Funding

Additional Information

Select Borrower Pair

Not for ICE 3 Perfect Test Not for ICE 3 Perfect Test

Save Next

Specialty Fields

Income Documentation Type

DSCR - Entity (LLC/Corp)

Date Entry Request (Application)

Yes

LOI Request Date

MM / DD / YYYY

LOI Signed

Select an Option

Specialty Products

LOI or GFE Selection

LOI

Date Entry Request Completed

MM / DD / YYYY

LOI Sent Date

MM / DD / YYYY

Trans Details Loan Program

Borrower First-Time Homebuyer?

- After the **Application** (Only **Data Entry Clients**) and **Credit Report Authorization** (Only if **Dominion** is pulling **credit**) have been uploaded to the **Loan Documents** section and product and pricing have been completed, then do the following:
 - From **Activities** menu, click **Application** > click **Additional Information**
 - Then, in the **LOI Request Date** field, **enter the date** to request the LOI (the **date field will be greyed out** if the applicable steps above have not been completed) > then click the **Save** button.

LOI Process

- **LOI Request received** is confirmed by email notification
- **Disclosure Desk** reviews application and credit report
- **LOI emailed** to broker for review
- **Broker replies** to email with *any changes needed* or *sends LOI to borrower for signature*

❖ Click **HERE** for next steps

Instructions for *TRID* Loans

29

DOMINION FINANCIAL
WHOLESALE

- From the **Activities** Menu, click **Fees and Disclosure Request**
- In Section **A. Origination Charges**, enter the **Broker Fees amount** and chose if **Borrower Paid** or **Lender Paid**
- In **Section B. Services You Cannot Shop For**, complete the following, if applicable:
 1. If collecting a **Broker Processing Fee**, go the **Broker Processing Fee Line** (If **Lender Paid Comp** is selected above, a **Processing Fee can only be charged if using a licensed third-party company.**)
 2. If using a **licensed third-party processing co.**, in the **Paid to Name column**, enter the **company name**.
 3. In the **Amount column**, enter the **fee amount**
- Once all fees are completed, click the **Save** button > then click the **Request Loan Estimate** button
 - All **Fees** will be **greyed out** once **Request Loan Estimate button** is selected.
 - If **LE is not requested** before loan **submission**, **disclosure request** will be sent simultaneously with the submission

Loan Documents - Upload Loan Submission Documents

The screenshot displays a web application interface for loan submissions. On the left is a sidebar menu with the following items: 'Loan Summary', 'Application', 'Order/Reissue Credit', 'Product & Pricing', 'Fees and Disclosure Request. *Must Enter Est Appraised Value Before Proceeding*', 'Loan Documents' (highlighted with a yellow box), 'UW Conditions **For Underwriter to Review Conditions, Click UW or Processing Submissions then Click Resubmit.', and 'Submit/Resubmit to UW or Processing **First Complete Product & Pricing**'. The main content area has a top navigation bar with 'Activities' and 'Workflow' tabs. Below this is a red warning message: '***Important: To Resubmit for Underwriter to Review Conditions, go to the tab called UW or Processing Submissions then Click Resubmit.***'. A 'Re-Submit Loan' button is in the top right. The main area shows a list of documents for 'All Borrowers'. The first document is '[UNASSIGNED]' with a 'Drag & Drop files here or Browse for files' button. The second document is 'PRODUCT AND PRICING' with a 'Comments' icon and a 'Drag & Drop files here or Browse for files' button. The third document is 'Peter Cottontail' with a 'CREDIT REPORT AUTHORIZATION' sub-header. Below this is 'LOAN SUBMISSION OR CONDITION DOCS' (highlighted with a yellow box) with a 'Comments' icon and a 'Drag & Drop files here or Browse for files' button. The last document is 'XX(EXTERNAL) DO NOT SHIP XX' with a 'Comments' icon and a 'Drag & Drop files here or Browse for files' button. At the top of the document list, there are buttons for 'Expand All', 'Collapse All', '+ Add Document', and 'Print Fax Cover Sheet', along with icons for a PDF and a printer.

- From the **Activities** Menu, click **Loan Documents**
- To the right of **LOAN SUBMISSION OR CONDITION DOCS** either **drag your files** to **Drag & Drop files here or** click the **Browse for files** and **upload them from your File Explorer**. Documents can be uploaded as **one file** or **individually**.
- **Do not** upload your submission to individual buckets.

Loan Documents – Uploading Borrower Signed LOI

JOHN SMITH
123 ANYTOWN STREET, Baltimore, MD, 21202
TPO Test Company 1 - Business

Loan #: 241202763
Total Loan Am... \$222,000.00

Loan Type: Conventional
Loan Purpose: Cash-Out Refinance

Interest Rate: 8.875%
LTV/Comb Lo... 66.67% / 66.67%

Started
Wh 1st

Activities Workflow

Loan Summary
Application
Order/Reissue Credit
Product & Pricing
Loan Documents

UW Conditions **For Underwriter to Review Conditions, Click UW or Processing Submissions then Click Resubmit.

Submit/Resubmit to UW or Processing **First Complete Product & Pricing**

eSign
Disclosure Tracking
Request Withdraw

Max attachment size is 200 MB. [View Supported Files.](#)

Expand All Collapse All + Add Document Print Fax Cover Sheet

All Borrowers

[UNASSIGNED] [Drag & Drop files here or](#) [Browse for files](#)

JOHN SMITH

CREDIT REPORT AUTHORIZATION [Comments](#) [Drag & Drop files here or](#) [Browse for files](#)

LETTER OF INTENT - BP [Comments](#) [Drag & Drop files here or](#) [Browse for files](#)

test - blank page.pdf 15 KB 12/03/2024 7:50 AM Jo Scheerer [Download](#) [Share](#)

test - blank page.pdf 15 KB 12/03/2024 7:50 AM Jo Scheerer [Download](#) [Share](#)

LOAN SUBMISSION OR CONDITION DOCS [Comments](#) [Drag & Drop files here or](#) [Browse for files](#)

- On the **Activities** Menu, click **Loan Documents** > upload the **Borrower signed LOI** to the **LETTER OF INTENT – BP** line by either **drag & dropping** it to **Drag & Drop file here or** clicking the **Browse for files** button and **locate application** on your computer

Loan Submission

- From the **Activities** Menu, click **Submit/Resubmit to UW or Processing** > then click **Submit Loan**
- A **Required Fields** pop-up will appear with any **additional field that need to be completed** prior to submitting the loan, Complete this pop-up as follows:
 - Click the **arrow** to the left of each required field.
 - On the expanded section, complete each Field, until all are completed.
 - Click the **Save** button.
 - Click **Confirm** button.

❖ A **Submitted message** will appear once the **submission is complete**.

Loan Submission Confirmation

JOHN SMITH
125 ANYTOWN STREET, Baltimore, MD, 21202
TPO Test Company 1 - Business

Loan #: 241202763
Total Loan Am... \$222,000.00

Loan Type: Conventional
Loan Purpose: Cash-Out Refinance

Interest Rate: 8.875%
LTV/Comb Lo... 66.67% / 66.67%

Started
Wh 1st

Activities Workflow

Loan Summary

Application

Registration Submission **3** Condition Approval 4 Clear to Close 5 Funding

- To confirm the submission was completed, scroll up and click **Loan Summary** on the left **Activities Menu**
- On the **Loan Tracker**, **Submission** should have a **check mark** above it; this confirms your loan has been submitted successfully.
- If there is a “2” above **Submission**. Go back to **Submit/Resubmit** section and click the **Confirm button** in the upper right corner. Then **return here** to confirm again.
- If issue continues, please email wholesalehelpdesk@thedominiogroup.com

Loan Approvals

The screenshot displays the 'Loan Approvals' interface. On the left, the 'Activities' menu is visible, with 'Loan Documents' highlighted. The main area shows a list of documents under the 'Workflow' tab. The documents are listed in a table with columns for Title, Comments, File Upload Instructions, and File Upload Button. The document 'UNDERWRITING: UW APPROVAL' is expanded, showing two entries: 'U/W Status Update - DSCR' (99 KB, 03/20/2025 6:02 PM, Christopher Brophy) and 'U/W Status Update - DSCR' (97 KB, 03/21/2025 2:33 PM, Christopher Brophy). The most recent entry is highlighted with a yellow box.

Title	Comments	File Upload Instructions	File Upload Button
TITLE: CLOSING PROTECTION LETTER	Comments	Drag & Drop files here or	Browse for files
TITLE: E&O	Comments	Drag & Drop files here or	Browse for files
TITLE: PRELIMINARY TITLE COMMITMENT	Comments	Drag & Drop files here or	Browse for files
TITLE: TAX CERTIFICATE	Comments	Drag & Drop files here or	Browse for files
TITLE: VESTING	Comments	Drag & Drop files here or	Browse for files
TITLE: WIRING INSTRUCTIONS	Comments	Drag & Drop files here or	Browse for files
UNDERWRITING: 1008 - TRANSMITTAL SUMMARY	Comments	Drag & Drop files here or	Browse for files
UNDERWRITING: LOAN EXCEPTIONS	Comments	Drag & Drop files here or	Browse for files
UNDERWRITING: UW APPROVAL	Comments	Drag & Drop files here or	Browse for files
U/W Status Update - DSCR	99 KB 03/20/2025 6:02 PM Christopher Brophy	Download, Copy, Delete	
U/W Status Update - DSCR	97 KB 03/21/2025 2:33 PM Christopher Brophy	Download, Copy, Delete	
XX(EXTERNAL) DO NOT SHIP XX	Comments	Drag & Drop files here or	Browse for files
XX(EXTERNAL) DO NOT SHIP XX	Comments	Drag & Drop files here or	Browse for files

- From the **Activities** Menu, click **Loan Documents** > then click the **down arrow** to the left of **UNDERWRITING UW APPROVAL**. This is where the **Conditional** and **Final Loan Approvals** will appear. Click on the most recent UW Status Update to review the decision
- An **Approval email** will be sent to you **after** the Underwriter's review.

UW Conditions

Activities | Workflow

- Loan Summary
- Application
- Order/Reissue Credit
- Product & Pricing
- Fees and Disclosure Request. *Must Enter Est Appraised Value Before Proceeding*
- Loan Documents
- UW Conditions **For Underwriter to Review Conditions, Click UW or Processing Submissions then Click Resubmit.**
- Submit/Resubmit to UW or Processing **First Complete Product & Pricing**
- eSign
- Disclosure Tracking
- Request Withdraw

Conditions (81)

Condition Type All Conditions

PUBLISHED	STATUS	CATEGORY	PRIOR TO	TYPE	NAME	DESCRIPTION			DISPOSITION
03/20/2025	Fulfilled		☐ Approval	Underwriting	Appraisal	Provide fully complete appraisal on appr...	1		Re-Open
03/20/2025	Fulfilled		☐ Closing	Underwriting	Appraisal Delivery	Provide evidence Appraisal was downloa...	1		Re-Open
03/20/2025	Added		☐ Docs	Underwriting	Appraisal Lender and AMC	Underwriter to confirm the appraisal sho...	1		Ready For Revi
03/20/2025	Added		☐ Funding	Underwriting	Appraisal Review - Clear Capital	Dominion Financial Wholesale will order ...	1		Ready For Revi
03/20/2025	Fulfilled			Underwriting	Appraisal: 1007 Rent Schedule	Obtain a comparable rent schedule on F...	1		Re-Open
03/20/2025	Fulfilled	Approval		Underwriting	Appraisal: Air Disclosure	Correspondent/Broker to rep & warrant t...	1		Re-Open
03/20/2025	Waived	Approval		Underwriting	Assets: Bank Statements/VOD	Most recent one months Bank Statement[...	2		
03/20/2025	Added	Funding		Underwriting	Assets: Cash Out Reserves	Need to verify \$2,153.84 x 6= \$12,923.04 ...			Ready For Revi
03/20/2025	Added	Funding		Underwriting	Closing Disclosure: Occupancy A...	Borrower to sign a final Occupancy Affida...	1		Ready For Revi
03/20/2025	Added	Funding		Underwriting	Closing Disclosures: Borrower Co...	Borrower(s) to sign the Borrower Contact ...			Ready For Revi
03/20/2025	Added	Funding		Underwriting	Closing Disclosures: ACH	Borrower to complete ACH form at closing.	1		Ready For Revi
03/20/2025	Added	Funding		Underwriting	Closing Disclosures: LLC Borrowe...	If the transaction is closing in an Entity's n...	1		Ready For Revi
03/20/2025	Added	Funding		Underwriting	Closing Disclosures: Spousal Con...	If the transaction is closing in an Entity's n...	1		Ready For Revi
03/20/2025	Added	Funding		Underwriting	Closing: 1st Note, Deed, & HUD-1	Copy of Note, Deed & HUD-1 of 1st Mortg...	3		Ready For Revi
03/20/2025	Added	Funding		Underwriting	Closing: AKA Affidavit	Name Affidavit for Borrower to be fully ex...	1		Ready For Revi

- From the **Activities** Menu, click **UW Conditions** to review all conditions on the loan. All **Prior to Approval Conditions** are the **Broker's responsibility**.
- Click on **Prior To**, then in the **dropdown** select the options of **Approval, Closing, Docs, Funding** to search when the **conditions are do by**.
- For **CTC**, all **Approval** and **Docs conditions** must be cleared.

UW Conditions – Removing Columns from View

Conditions (81)

Condition Type All Conditions

PUBLISHED	STATUS	CATEGORY	PRIOR TO	TYPE	NAME	DESCRIPTION	
03/20/2025	Fulfilled			Underwriting	Appraisal	Provide fully complete appraisal on appr...	
03/20/2025	Fulfilled			Underwriting	Appraisal Delivery	Provide evidence Appraisal was downloa...	
03/20/2025	Added			Underwriting	Appraisal Lender and AMC	Underwriter to confirm the appraisal sho...	
03/20/2025	Added			Underwriting	Appraisal Review - Clear Capital	Dominion Financial Wholesale will order ...	
03/20/2025	Fulfilled			Underwriting	Appraisal: 1007 Rent Schedule	Obtain a comparable rent schedule on F...	
03/20/2025	Fulfilled	Approval	Underwriting	Appraisal: Air Disclosure	Correspondent/Broker to rep & warrant t...		
03/20/2025	Waived	Approval	Underwriting	Assets: Bank Statements/VOD	Most recent one months Bank Statement...		
03/20/2025	Added	Funding	Underwriting	Assets: Cash Out Reserves	Need to verify \$2,153.84 x 6= \$12,923.04 ...		
03/20/2025	Added	Funding	Underwriting	Closing Disclosures: Occupancy A...	Borrower to sign a final Occupancy Affida...		
03/20/2025	Added	Funding	Underwriting	Closing Disclosures: Borrower Co...	Borrower(s) to sign the Borrower Contact ...		
03/20/2025	Added	Funding	Underwriting	Closing Disclosures: ACH	Borrower to complete ACH form at closing...		
03/20/2025	Added	Funding	Underwriting	Closing Disclosures: LLC Borrowe...	If the transaction is closing in an Entity's n...		
03/20/2025	Added	Funding	Underwriting	Closing Disclosures: Spousal Con...	If the transaction is closing in an Entity's n...		
03/20/2025	Added	Funding	Underwriting	Closing: 1st Note, Deed, & HUD-1	Copy of Note, Deed & HUD-1 of 1st Mortg...		
03/20/2025	Added	Funding	Underwriting	Closing: AKA Affidavit	Name Affidavit for Borrower to be fully ex...		

Clear Filters
Reset View
Customize Columns

PRIOR TO

DISPOSITION

Multi Selection
Search all

☒ Prior To
☒ Comments
☒ Disposition
☐ Category
☐ Published
☒ Status
☐ Type

- From the **UW Conditions** screen, you can remove columns, so you don't have to continually scroll to the right to view the **Ready for Review & Re-Open** buttons.

- Scroll** all the way to the right
- Click on the **3 dots** at the top right of the screen.
- On the dropdown, click **Customize Columns**
- On the next dropdown, click on the **columns** you do not want to show in your view , which will **uncheck the columns** and **condense the view** so you can see the **Ready for Review & Re-Open** buttons.

Uploading Conditions

Condition Type: All Conditions

PUBLISHED	STATUS	CATEGORY	PRIOR TO	TYPE	NAME	DESCRIPTION	DISPOSITION
03/20/2025	Waived		Approval	Underwriting	Credit: Credit Report (IPE)	*Please provide full Tri-Merge credit repo...	✓
03/20/2025	Waived	Credit	Approval	Underwriting	Credit: Fraud Alert on Credit	Active Fraud Alert on credit report Must o...	✓
03/20/2025	Added	Docs	Underwriting	Credit: Fraud Report	Underwriter to review Fraud Manager rep...	Underwriter to review Fraud Manager rep...	⌚ Ready For Review

Description:
Underwriter to review Fraud Manager report for any red flags or high alerts. Processor to provide the following documentation to clear alerts:

Linked Document Folders | 2

- Fraud
 - Browse LOCAL DRIVE UNASSIGNED FILES
- Fraud/Audit Services
 - Browse LOCAL DRIVE UNASSIGNED FILES

Condition Type: All Conditions

PUBLISHED	STATUS	CATEGORY	PRIOR TO	TYPE	NAME	DESCRIPTION	DISPOSITION
03/20/2025	Waived		Approval	Underwriting	Credit: Credit Report (IPE)	*Please provide full Tri-Merge credit repo...	✓
03/20/2025	Waived	Credit	Approval	Underwriting	Credit: Fraud Alert on Credit	Active Fraud Alert on credit report Must o...	✓
03/20/2025	Added	Docs	Underwriting	Credit: Fraud Report	Underwriter to review Fraud Manager rep...	Underwriter to review Fraud Manager rep...	⌚ Ready For Review
03/21/2025	Cleared	Credit	Approval	Underwriting	Credit: Housing History	Document sufficient housing history for p...	✓

Condition Type: All Conditions

PUBLISHED	STATUS	CATEGORY	PRIOR TO	TYPE	NAME	DESCRIPTION	DISPOSITION
03/20/2025	Waived		Approval	Underwriting	Credit: Credit Report (IPE)	*Please provide full Tri-Merge credit repo...	✓
03/20/2025	Waived	Credit	Approval	Underwriting	Credit: Fraud Alert on Credit	Active Fraud Alert on credit report Must o...	✓
03/20/2025	Fulfilled	Docs	Underwriting	Credit: Fraud Report	Underwriter to review Fraud Manager rep...	Underwriter to review Fraud Manager rep...	⌚ Re-Open
03/21/2025	Cleared	Credit	Approval	Underwriting	Credit: Housing History	Document sufficient housing history for p...	✓

Steps for Uploading documents to Conditions

1. Click on the **arrow** to the left of the **date for the condition** > in the **expanded section** either **drag & drop** to the **cloud icon** or click **LOCAL DRIVE** to browse to upload. If this section is missing contact your Loan Account Manager or Underwriter to fix.
2. Click on the **Ready For Review** button to the far right of the condition.
3. After completing **Step 2**, the **STATUS** changes to **Fulfilled** and the far-right column the button changes to **Re-Open**.

Re-Submit Loan to send condition/docs for Review

The screenshot displays the 'Activities' menu on the left, which includes options like 'Loan Summary', 'Application', 'Order/Reissue Credit', 'Product & Pricing', 'Fees and Disclosure Request', 'Loan Documents', and 'UW Conditions'. The 'UW Conditions' section is highlighted with a yellow box, and the 'Re-Submit Loan' button is also highlighted. The main content area shows a loan summary for a \$196,000.00 loan, which is 'Conditionally Approved' as of 03/21/2025. The loan details include a base loan amount of \$196,000.00, a sub-financing amount of \$0.00, and a purpose of 'CashOutDebtConsolidation'. The loan is locked at 8.250% from 03/14/2025 to 04/14/2025. The conditions section shows 'Open' at 49 and 'Ready for Review' at 13. The P&I is \$1,472.48, and the reserves are \$0. The DTI is 0.000%/0.000%.

Workflow: Registration (✓) → Submission (✓) → Condition Approval (✓) → **4 Clear to Close** → Funding (5)

\$196,000.00
70.00% / 70.00% / 70.00%

Base Loan Amount: \$196,000.00
Sub. Financing: \$0.00

MI, FF, MIP Financed: \$0.00
Purpose of ReFi: CashOutDebtConsolidation

Conditionally Approved
03/21/2025

Conditions

Open	49
Ready for Review	13

[Show Details](#)

P & I: \$1,472.48
Reserves: \$0
DTI: 0.000%/0.000%

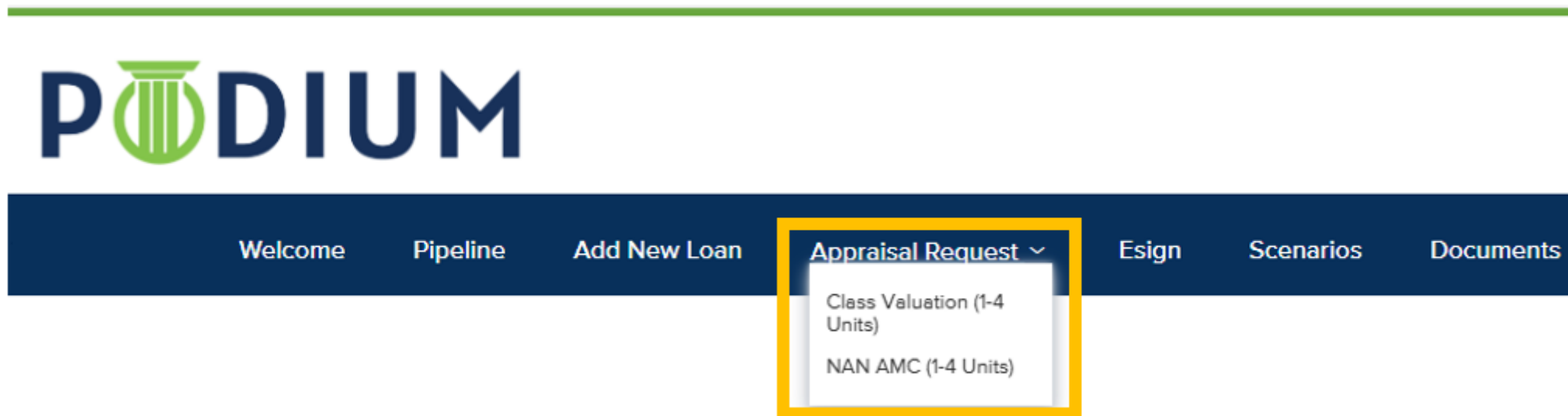
Locked 8.250%
03/14/2025 - 04/14/2025 (32d)
[Search Product and Pricing](#)

Amortization Type: Fixed
Amortization Term: 360

Decision FICO 744

- Once conditions are marked **Fulfilled** and loan is ready to re-submit to UW, from the **Activities** Menu > click **Submit/Resubmit to UW or Processing**
- **Submit Loan** and **Re-submit Loan** will appear below on the **Activities** Menu > click **Re-submit Loan** to send the conditions/docs for review (**Do NOT click Submit**)

Appraisal Order – AMC Links



- On the **Top Menu Bar**, click **Appraisal Request** > then select one of the AMC options in the dropdown
- You will then be directed to the **AMC's website** > either **log in** with **your own AMC credentials** for the **company selected** or if you don't have an account, you can **register** to **sign up for an account**.
- When you place your appraisal order, **it's important to select *Dominion* in the Lender dropdown**, if **Dominion is not in the dropdown contact the AMC to have us added**.

Pipeline Page

PODIUM Contact Us Tammy Robinson

TPO Contacts Welcome **Pipeline** Add New Loan Appraisal Request ▾ Esign Scenarios Documents

Pipeline Loan # ▾ Search 🔍

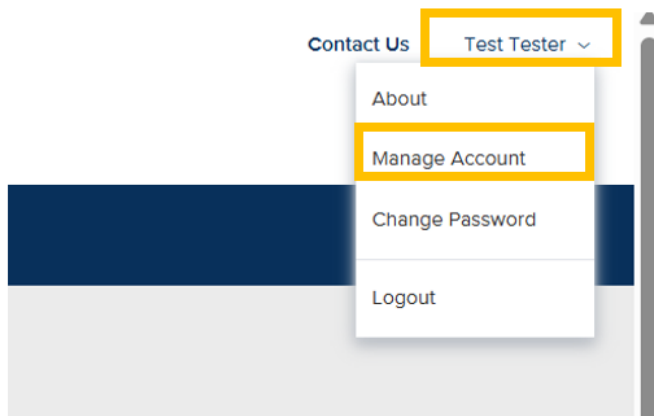
Channel ▾ **View ▾** All Loans
✓ All Loans
My Loans

	BORROWER NAME	ALTERNATE LOAN #	PROPERTY ADDRESS	STATUS	LOCK & REQUEST STATUS	RATE LOCK EXPIRES	DELIVERY DATE	PURCHASE DATE	COMMIT. #
✉	Perfect Test, Not for ice 3	241002646 241002644	3726 Poplar St Austin TX 78669	Send to Processing	🔓 Unlocked				
✉	Perfect Test, Not for ice 3	241202754 241002682	3726 Poplar St Spicewood TX 78669	Started	🔓 Unlocked				
✉	Perfect Test, Not for IC E 3	250302922	TX	Started	🔓 Unlocked				

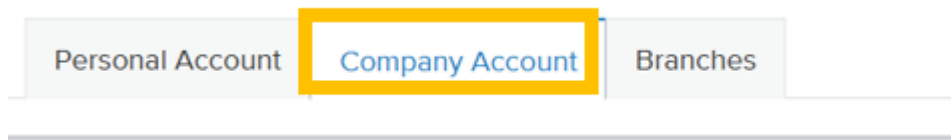
- On the **Top Menu Bar**, click **Pipeline** > then click the **View dropdown** and select **All Loans** or **My Loans** to view/sort **all loans in the company pipeline or just your loans**.
- In the upper right corner, you can also search for a specific loan in the dropdown by the following:
 - **Loan #** > then enter the **Loan #** in the **Search box** to the right > then click the **magnifying glass icon**
 - **Borrower Name** > then enter the **Borrower Name** in the **Search box** to the right > then click the **magnifying glass icon**

Administrator

Administrator - TPO Manager



- Administrator/TPO Manager to log in to **PODIUM**
- On right-hand side of screen in the upper corner, click on **username**
- In the dropdown, click **Manage Account**



Company Contacts							Add Contact  	
First Name	Last Name	Address	Business Phone	Email	Login Status	Personas		
Test	TPO	111 Main Street		stephaniem@thedominiong...	Enabled	3	View	Delete
Tammy	Robinson	111 Main Street		tammyr@thedominiongroup...	Enabled	3	View	Delete

- On the pop-up screen, click on **Company Account**
- Scroll down to **Company Contacts**:
- To add a user, click **Add Contact**
 - **Complete all necessary fields** to issue **credentials**
- To delete a user, click **Delete**