# *Valet*

ACBN
AMERICAN CAPITAL BROKER NETWORK
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# *Demo*

# ACBN VALET

## Features of ACBN Valet

- Access the pipeline
- Check loan status
- Upload new loans
- Fax or upload conditions/documentation

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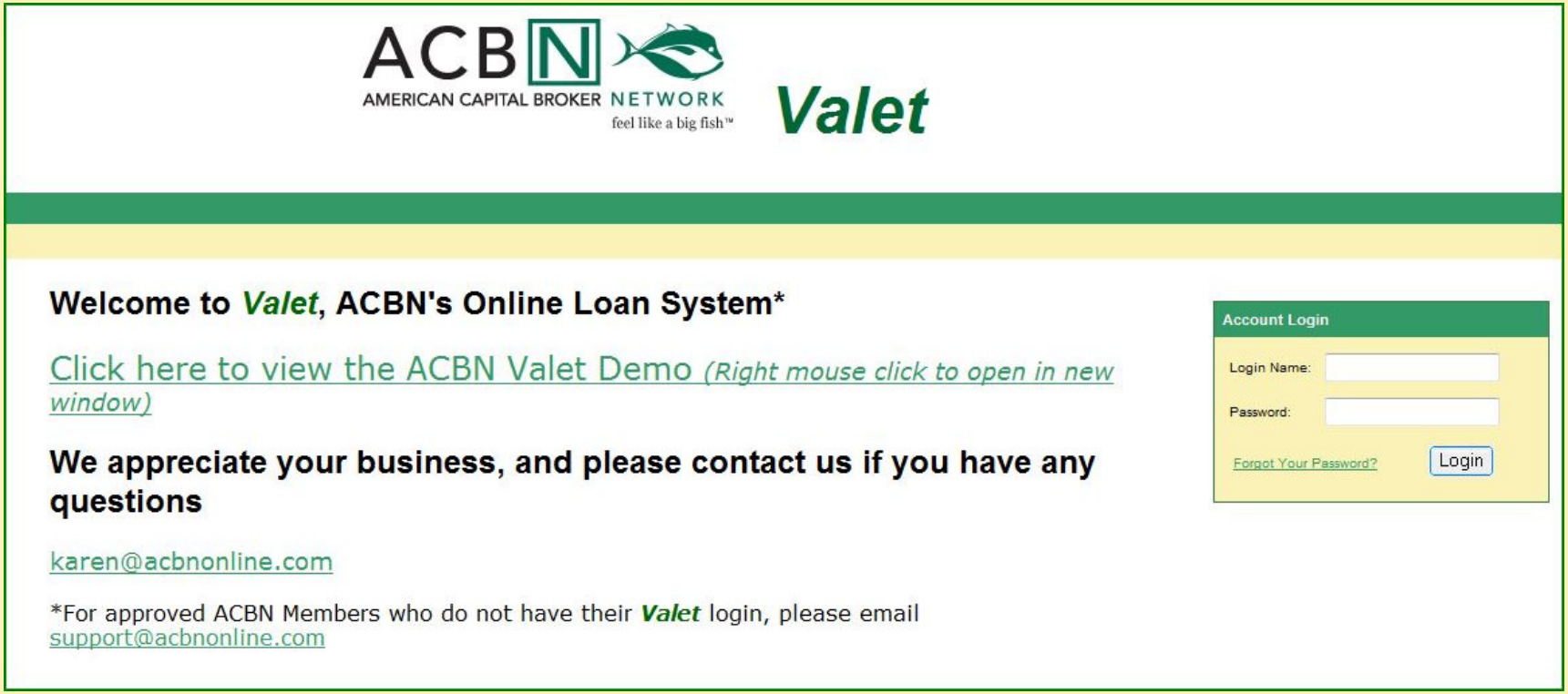
# ACBN VALET ACCESS via

## www.acbnonline.com

Click here

# Login to ACBN VALET

## Enter your Login Name and Password



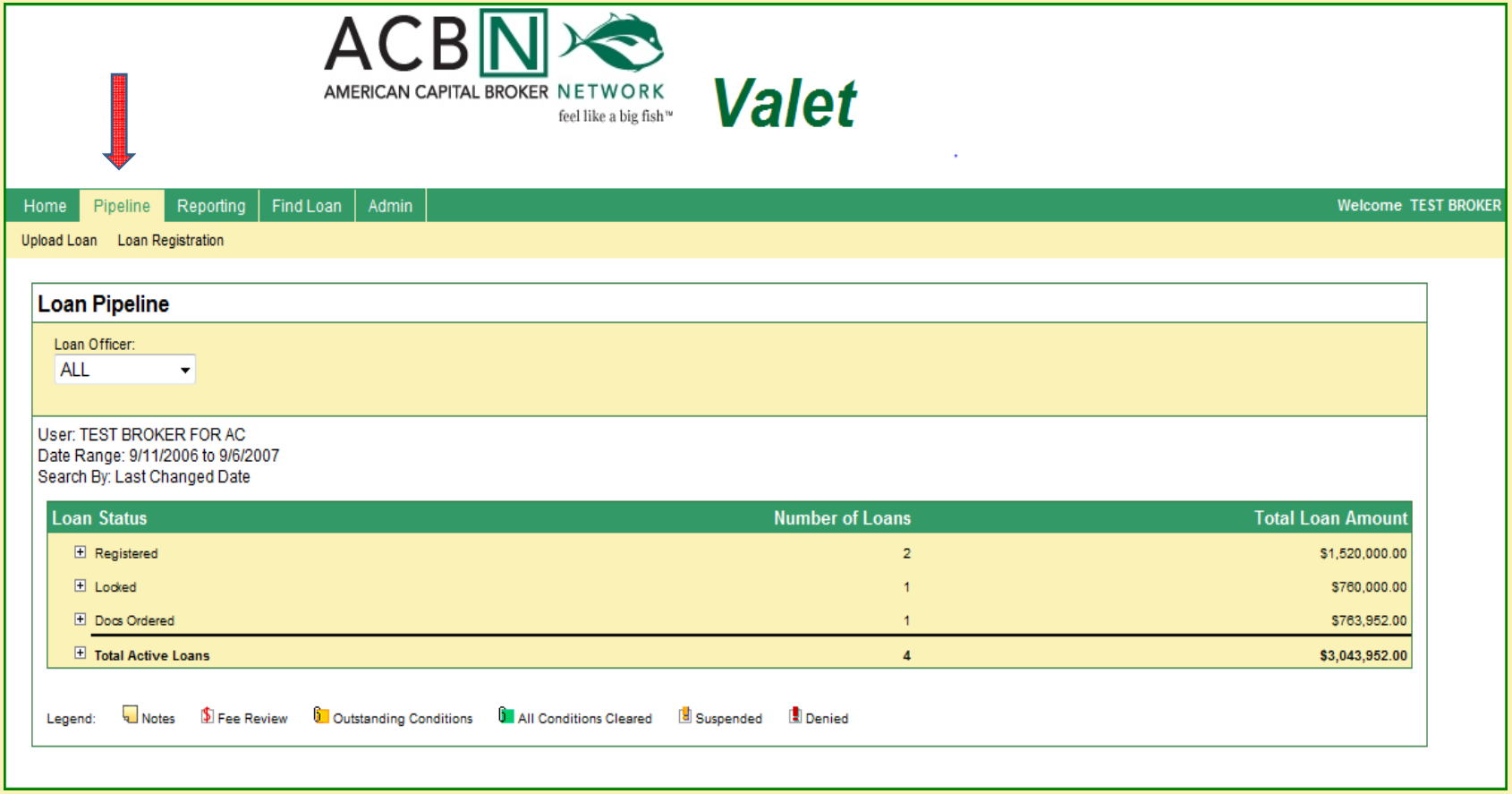

**If you do not have a Login Name and Password, please contact support@acbnonline.com**

# Valet Home Page

**You can access the following from our home page:**

# Loan Pipeline

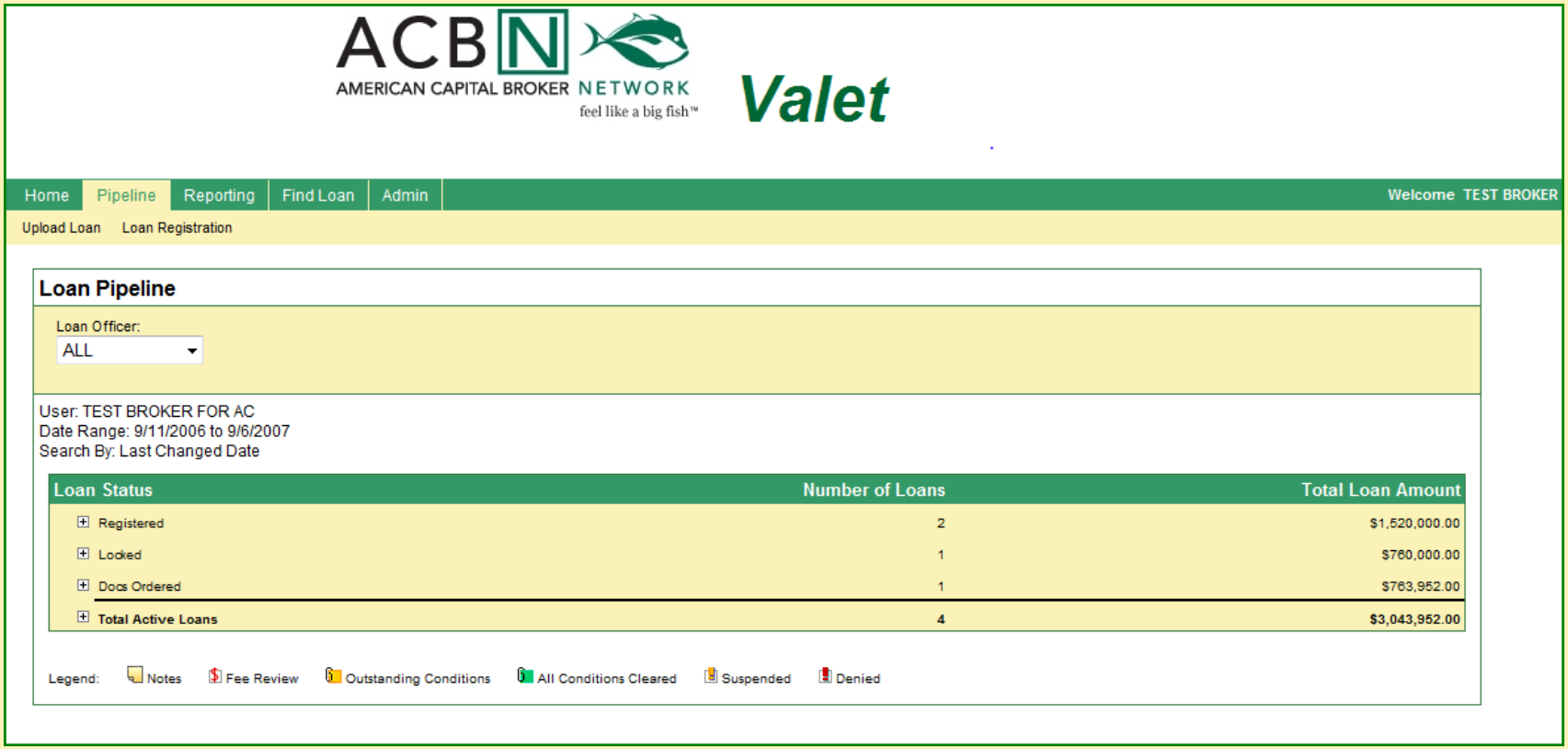
**From the Pipeline, you can view registered and approved borrower information in detail by expanding the list**



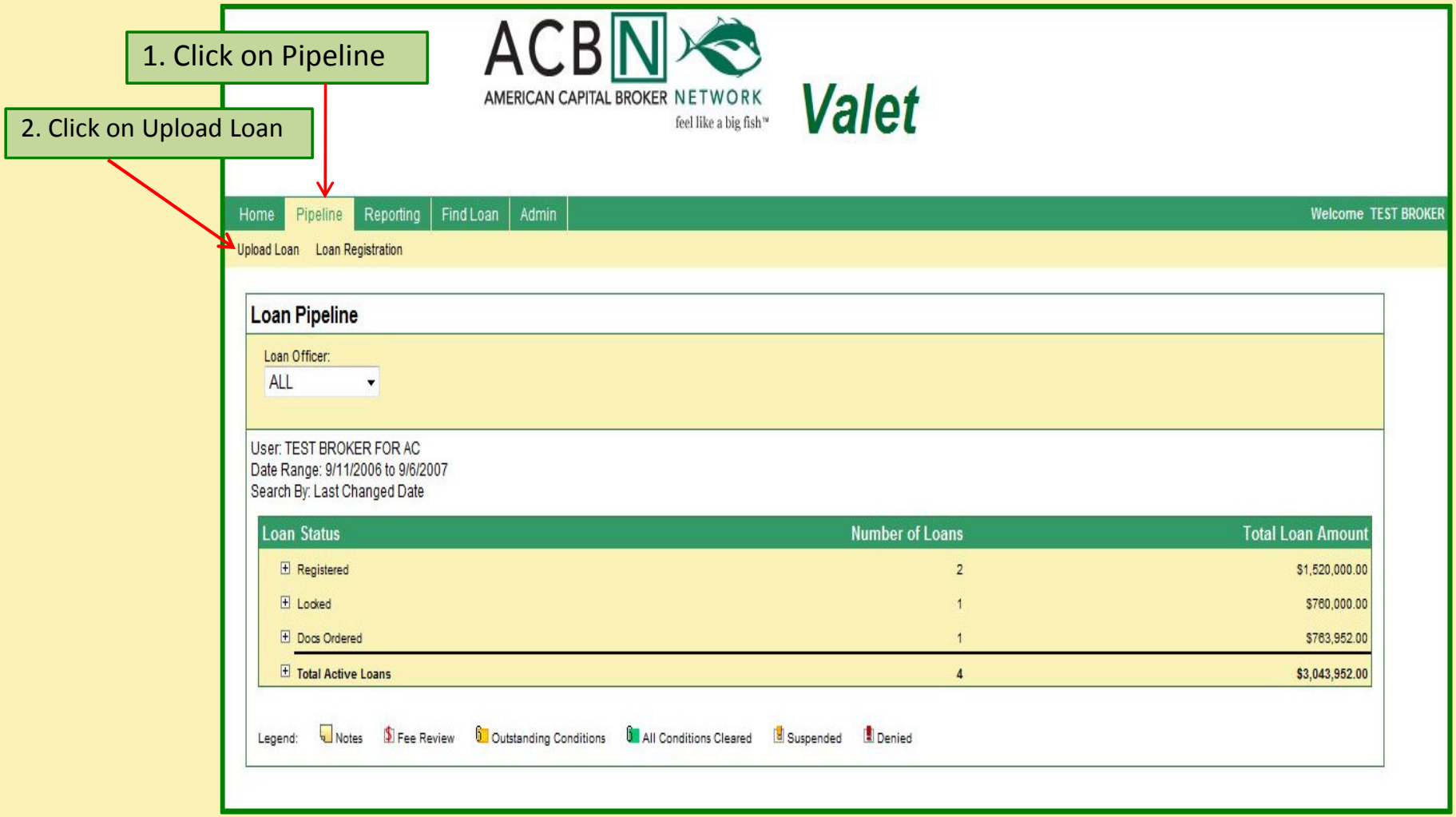
# Pipeline Features

**The Pipeline allows you to:**

- Upload loans
- View loan details
- Sort loans
- View and add notes



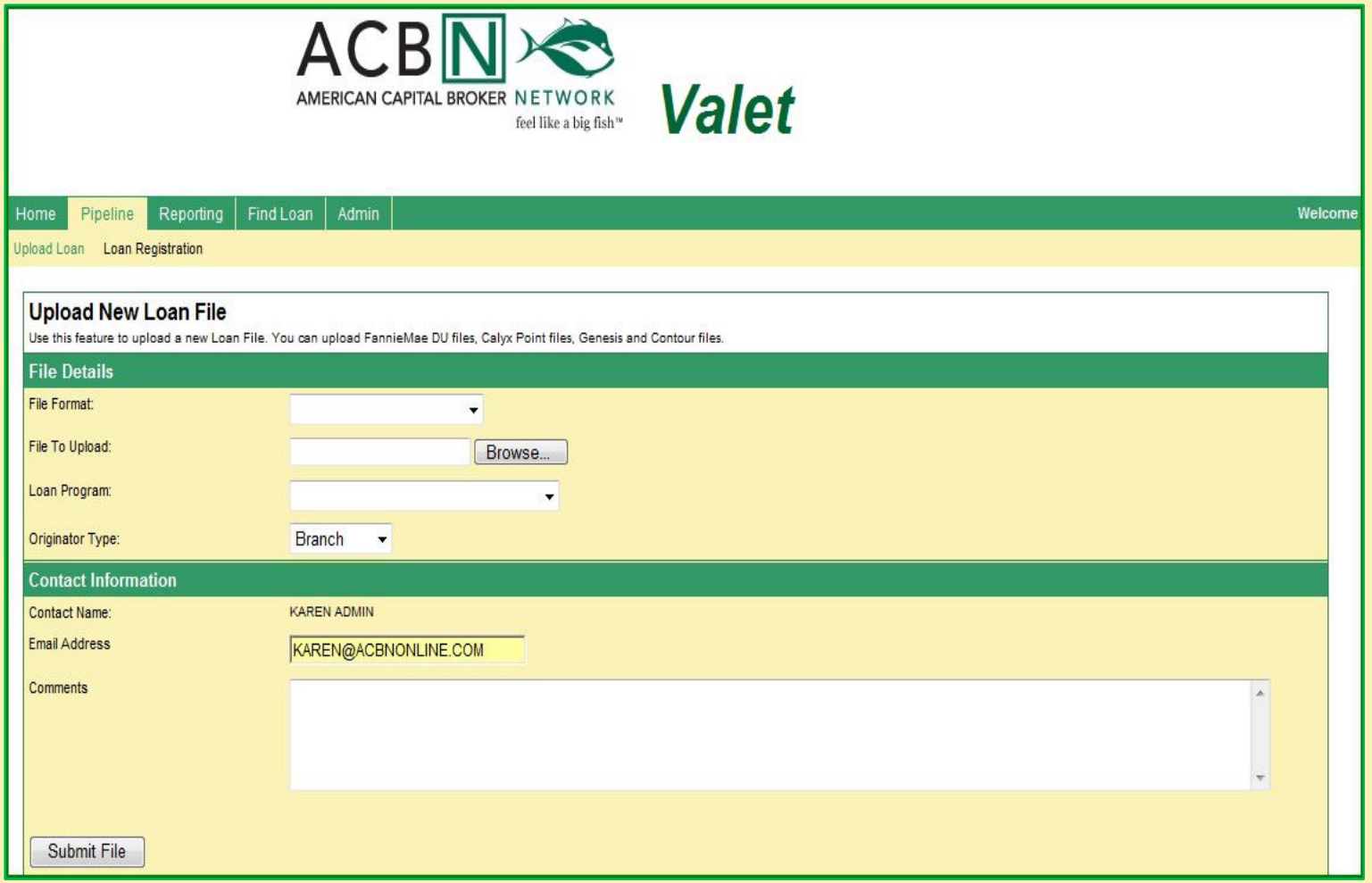
# How to Upload a Loan



# Upload Loan

**Complete the following fields:**

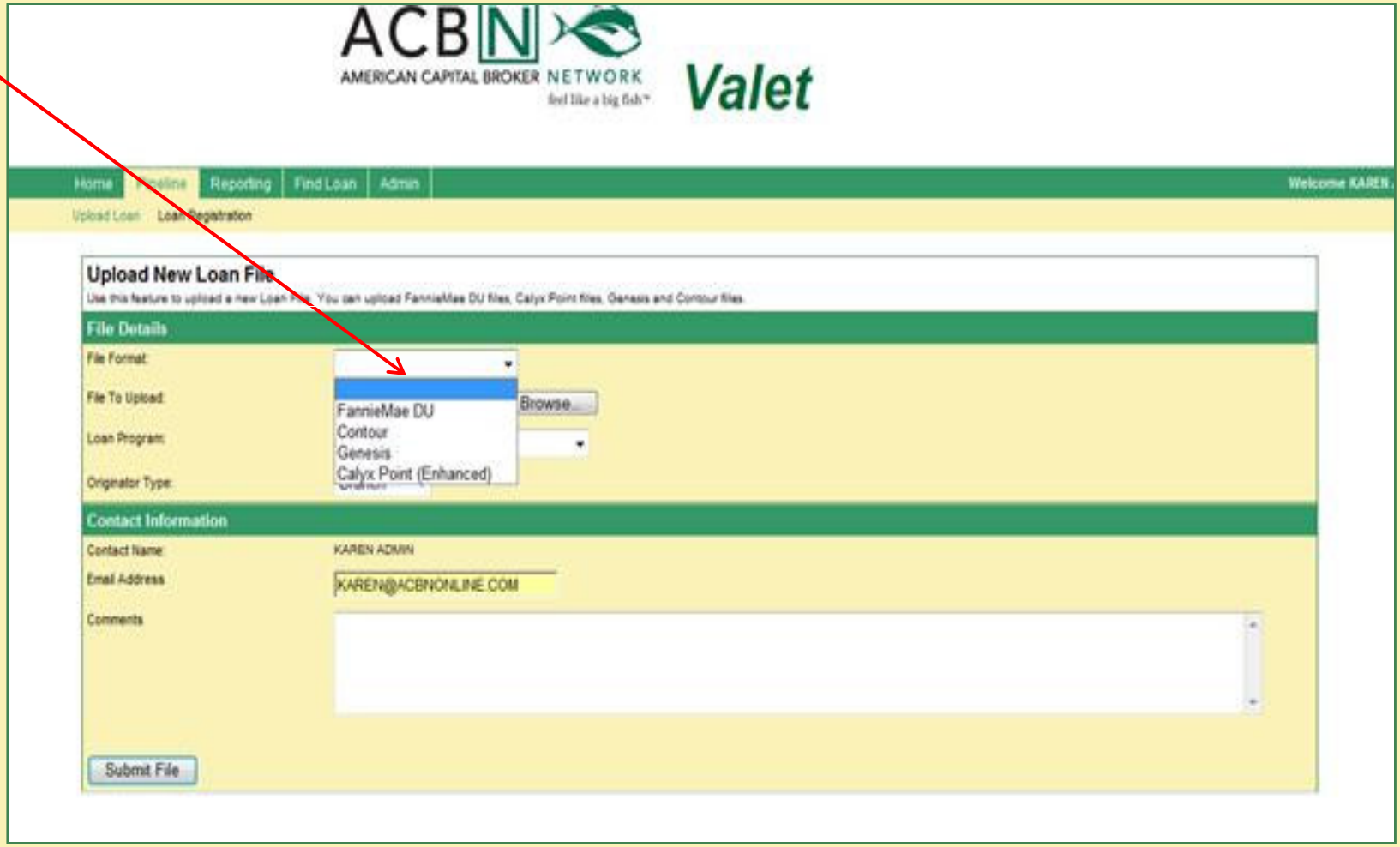
- File Format
- File to Upload
- Loan Program
- Contact Name
- Email Address
- Comments



# Choosing File Format

**Choose a File Format from the drop down menu**

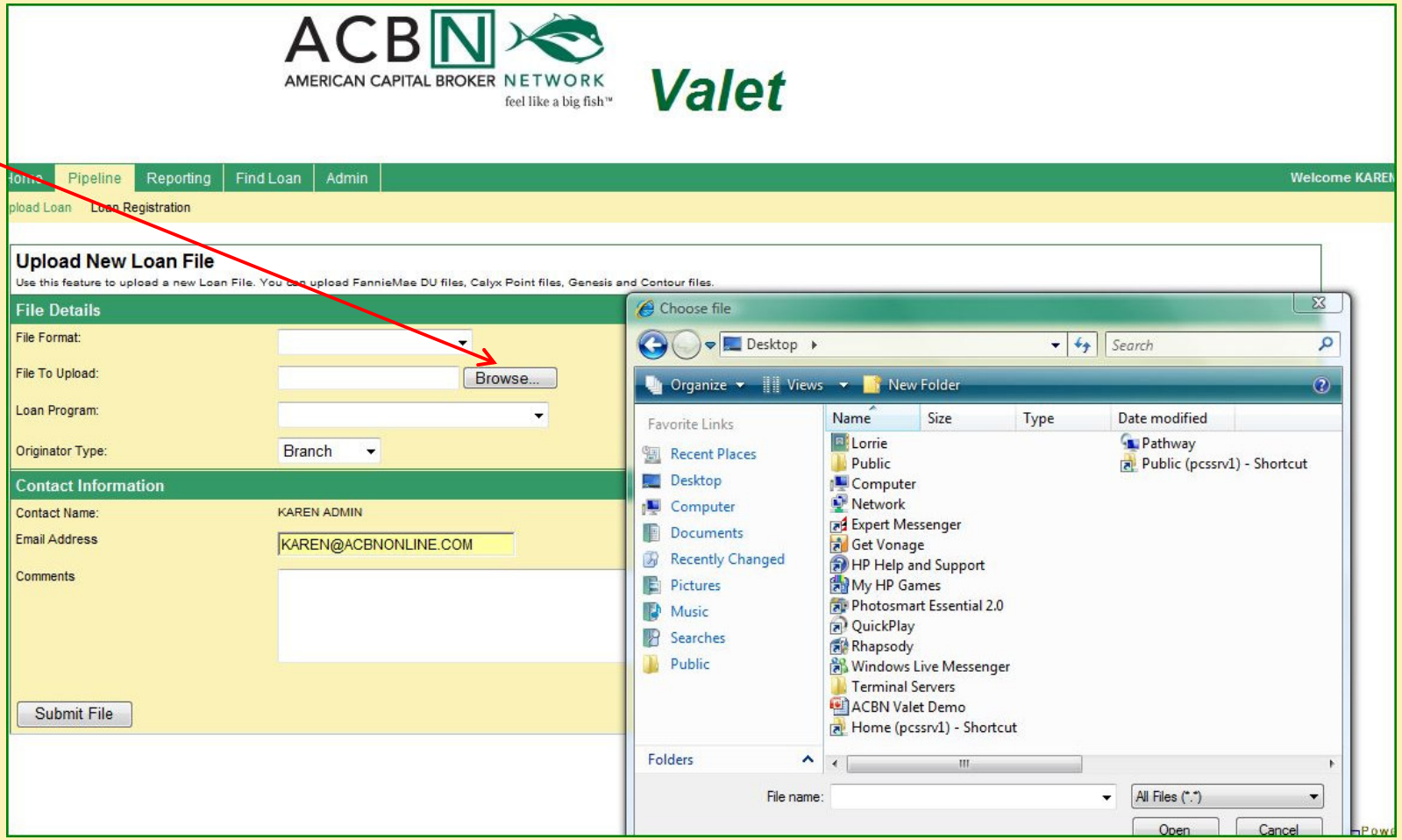
Click here to view the drop down menu



# Upload Your File

**Browse to locate the file in your computer or server and click open**

**Click Browse**

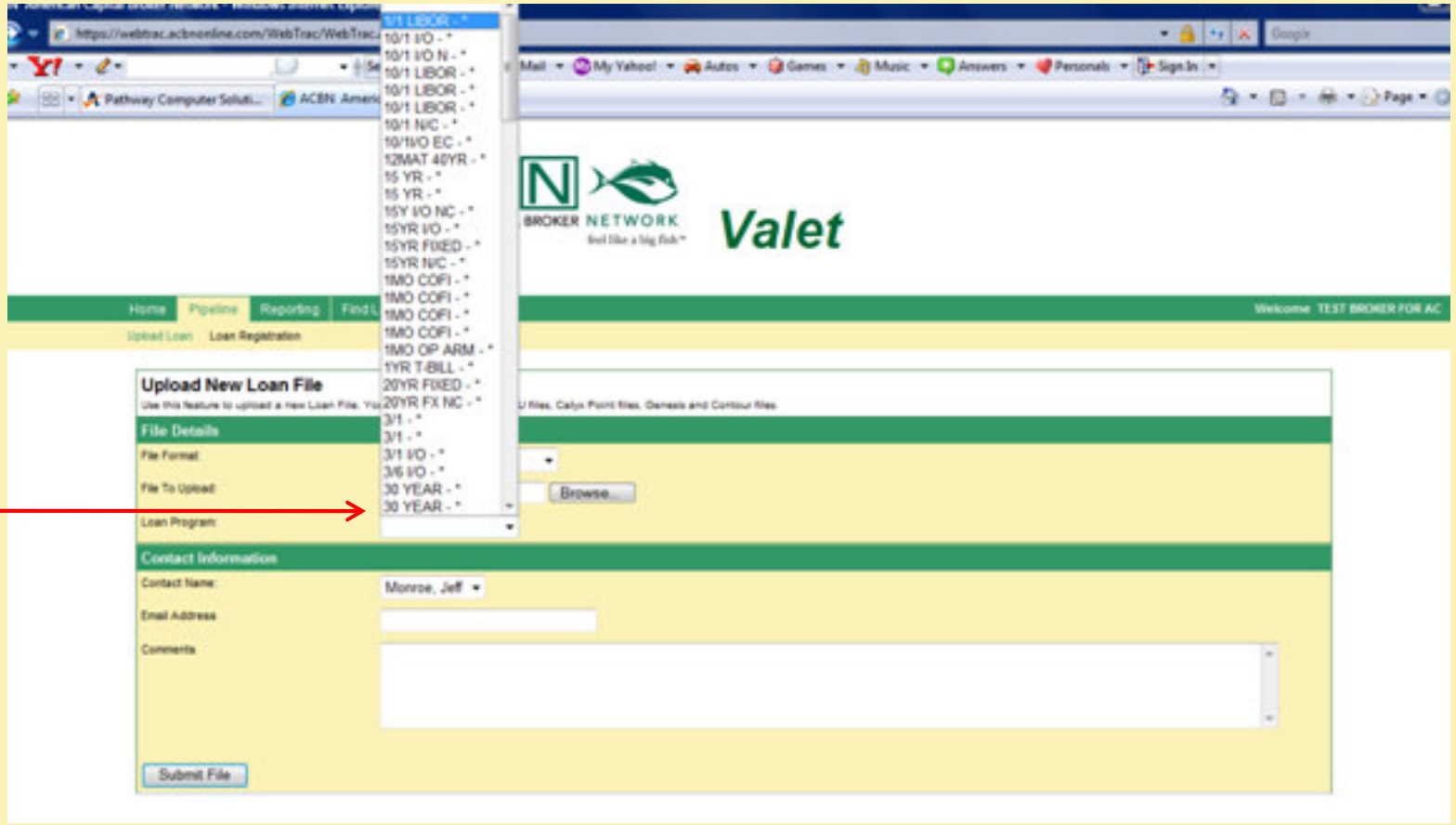


# Loan Program

## ACBN VALET

**Choose the appropriate Loan Program from the list**

**Click on the drop down menu to view loan programs**

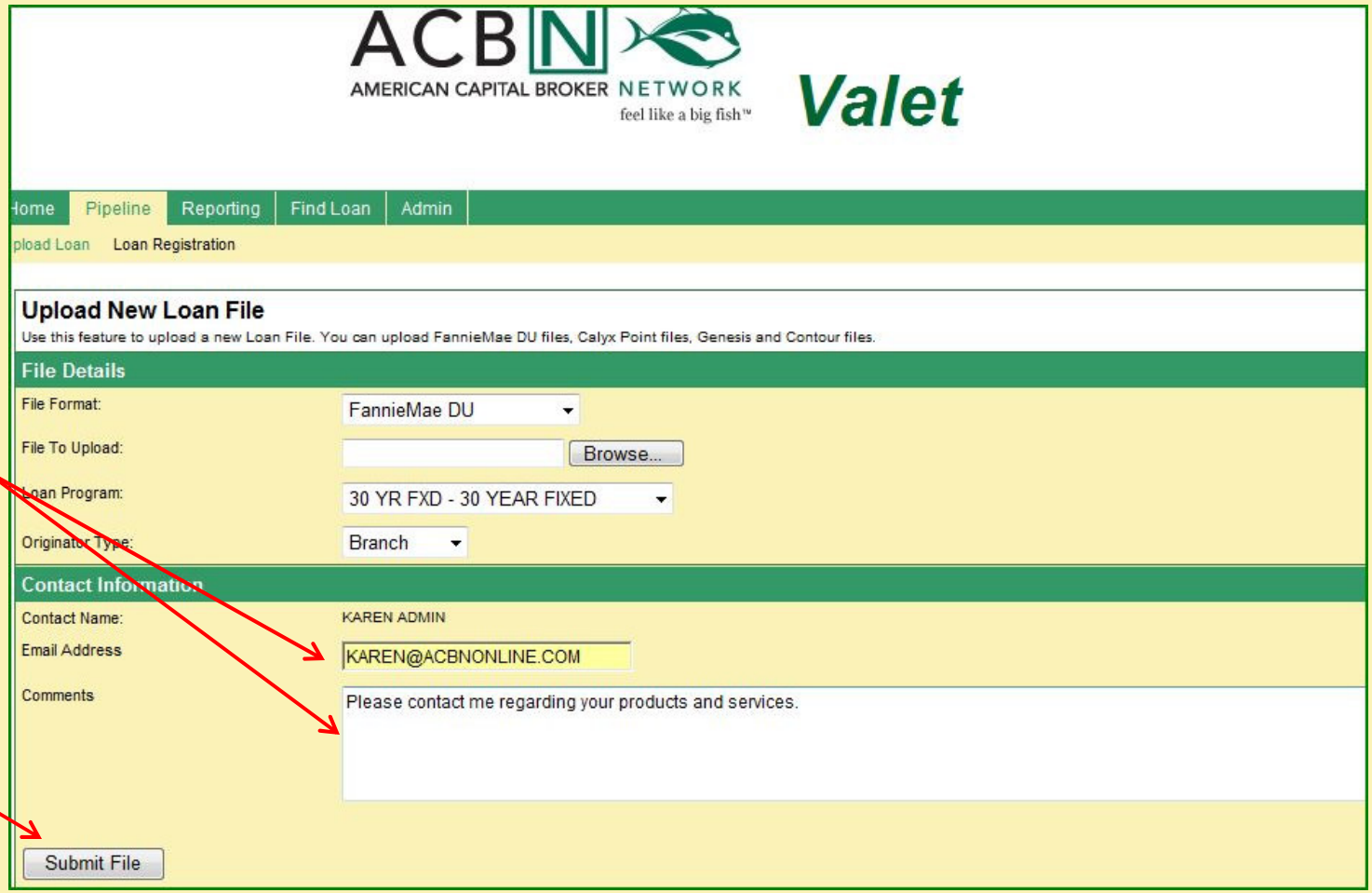


# Contact Information

## ACBN VALET

Enter your Email Address and add any Comments

Click Submit File



# Check for Duplicates

## ACBN VALET

The system will check for duplicate loans and display the following message:

**This file already exists in the system.**
**Please contact us for assistance. Thank you for your business.**
**support@acbnonline.com**

You may then choose from the following options:

- Update the Loan Information
- Enter a New Loan
- Cancel the existing one

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# *Upload Confirmation*

## ACBN VALET

**We have received your loan submission. There are 2 more steps to take to complete the process:**

**Step One:**

**Please complete the loan submission form by clicking on this link:**

http://www.acbnonline.com/valet/

We will receive a copy of this submission form electronically. In addition, please print a copy of the form and send it with your hard files. You may also want to print a copy for your records.

**Step Two:**

**Please send us a copy of your loan file. You can do this in the following ways:**

**Using our Imaging Technology:** ***No need to send us a hard file!***

**Click on the borrower name in the box down below. That will take you to the loan details page for this borrower. Once there, look at the options on the top right of the page. You can scan the file to your desktop, then upload the pdf of your file. Or print a fax cover page specific to this borrower, and use this to fax the file to us. The fax number is on the fax cover page.**

**If you have submitted a first and a second, complete the above for each loan. There is *no need to send us the hard file* if you have uploaded or faxed the file to us. If you need help, click on the question mark in the loan details page.**

**Or -**

**Transbox a hard copy of the loan in the overnight transbox.**

**Transbox Orange 1323**

If you are submitting a first and a second, please send a hard copy for each loan.

Once the hard files have been received and reviewed, they will be sent to underwriting. The status of the loan in ***Valet*** will change from registered to submitted when underwriting has received a complete loan package. Please be sure to check ***Valet*** during the loan status for up to date information on your file.

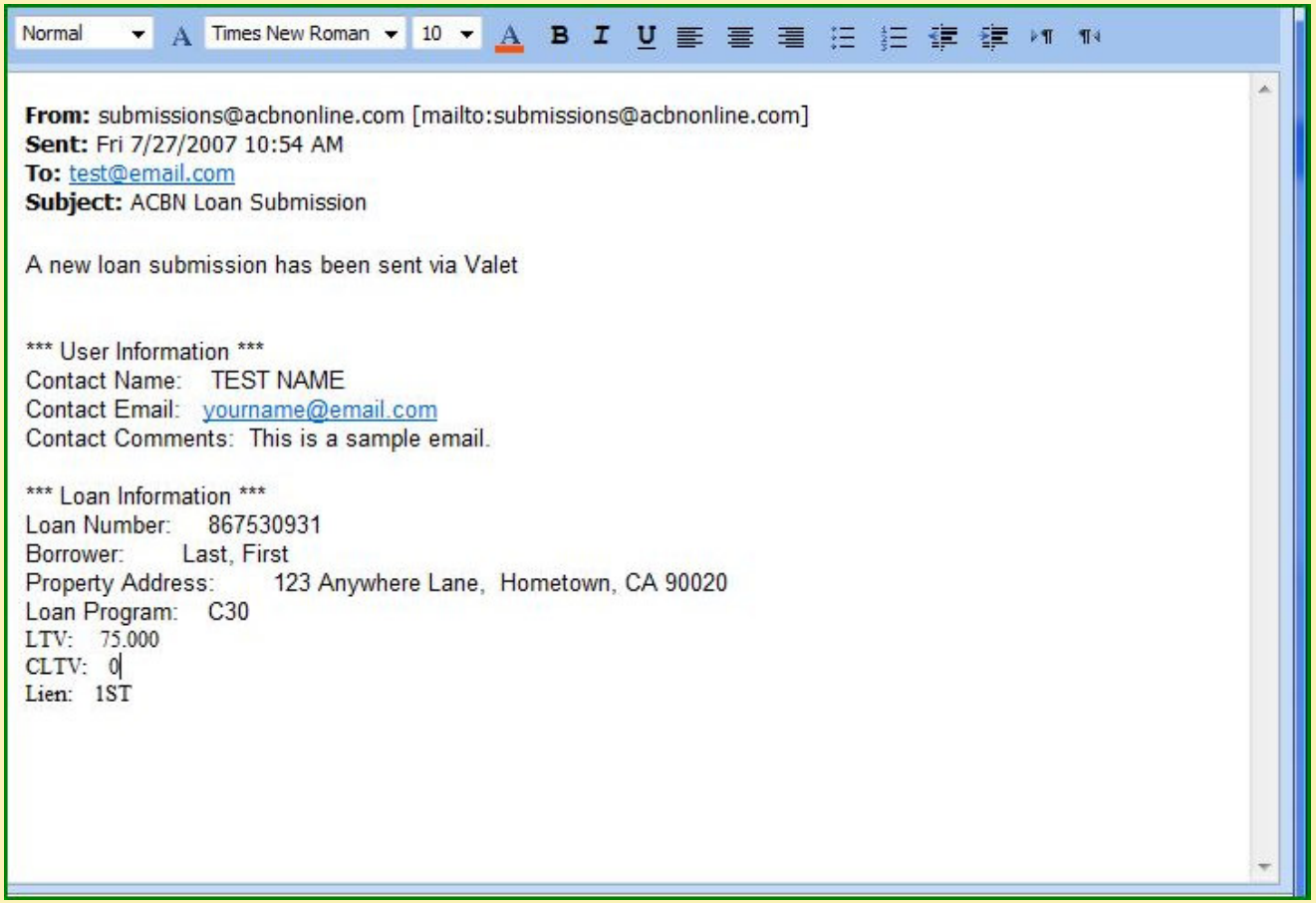
Thank you for your business, and please feel free to contact us with any questions.

Melody Castillo
ACBN Sales Assistant
melody@acbnonline.com
310 252 7292

# Email Confirmation

## ACBN VALET

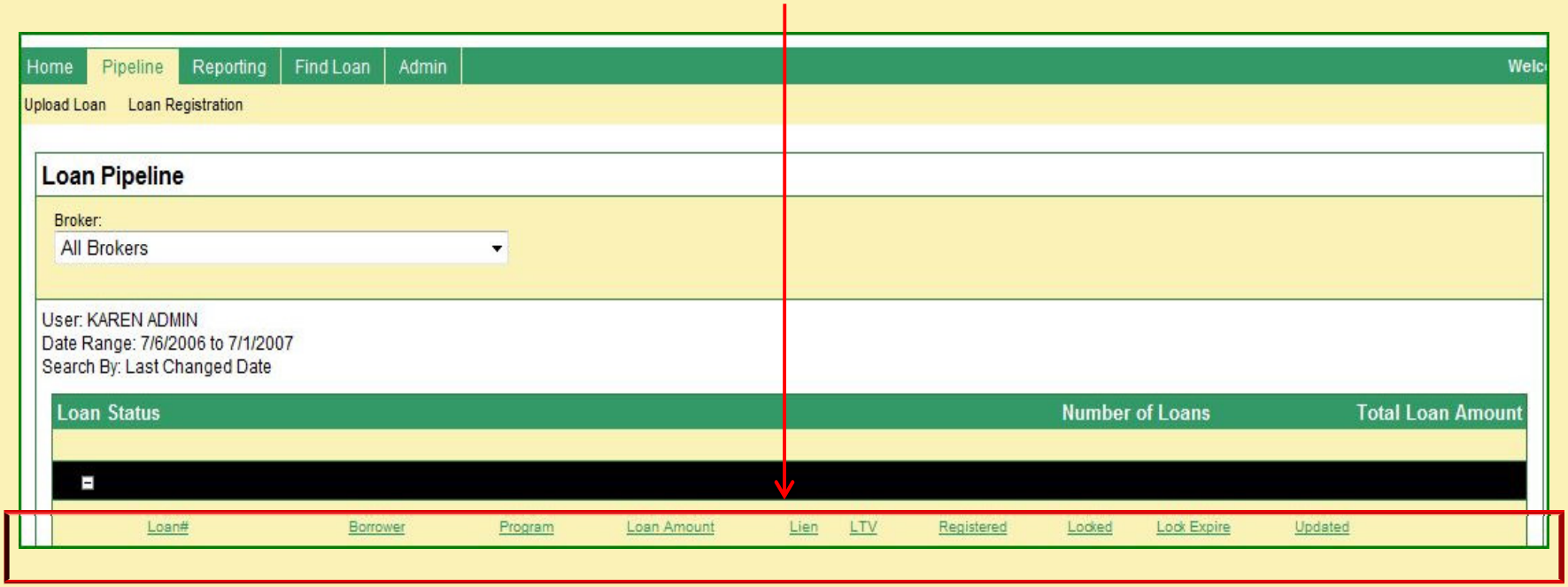
**You will receive a confirmation via email once your loan has been successfully uploaded to the Valet**



# Sort Loans

## ACBN VALET

**Click on any column header to sort loans**



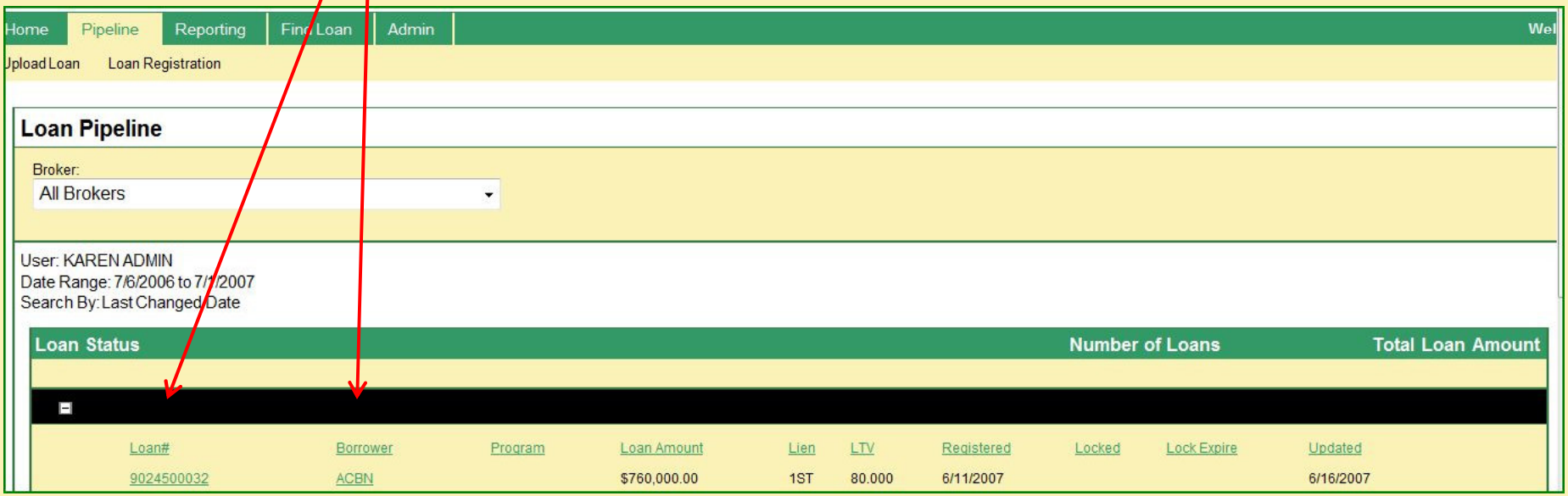
# View Loan Details

## ACBN VALET

**Click on Loan Number or Borrower**

You will be able to view:

- Details of the loan
- Notes
- Conditions
- Fee Review



# Details of the Loan

## ACBN VALET

- General Loan Information
- Loan Program Information
- Borrower Details
- Notes & Conditions

### Loan Details

Print Fax Cover | Upload a Document | View Documents

**General Loan Information**

| | |
|---|---|
| Loan Number: | 9024500032 |
| Current Stage: | REGISTERED |
| Borrower: | ACBN, AMERICAN |
| Primary SSN: | 555-77-5555 |
| Property: | 123 ANYTIME STREET, MANHATTAN BEACH, CA 90266 |
| Property Type: | SFR |
| Broker | TEST BROKER FOR AC |
| LO/Rep: | JEFF MONROE |
| Office: | ACBN |
| Underwriter: | |
| Processor: | SUZIE DANPERSAUD |

**Borrower Details**

| | Borrower | Spouse |
|---|---|---|
| Name: | AMERICAN ACBN | |
| SSN: | 555-77-5555 | |
| Credit Score: 1 | 0 | 0 |
| Credit Score: 2 | 0 | 0 |
| Credit Score: 3 | 0 | 0 |
| Home Phone: | 310 555-5555 | |
| Work Phone: | 310 640-0100 | |
| Email: | | |
| DTI: | 30.26 | 0 |
| Loan Source: | | |

**Loan Program Information**

| | |
|---|---|
| Program: | |
| Description: | |
| Lien Position: | 1ST |
| Base Loan Amt: | $760,000.00 |
| Loan Amount: | $760,000.00 |
| Sales Price: | $950,000.00 |
| Appraised Value: | $950,000.00 |
| LTV: | 80.000 |
| CLTV: | 80.000 |
| Subordinate Amt: | 0 |
| Impounds?: | NO |
| Interest Rate: | 6.000 |
| Rate Sheet Price: | 0 |
| Net Buy Price: | 0 |
| O/O?: | YES |
| Purpose: | PURCHASE |
| Doc Type: | |

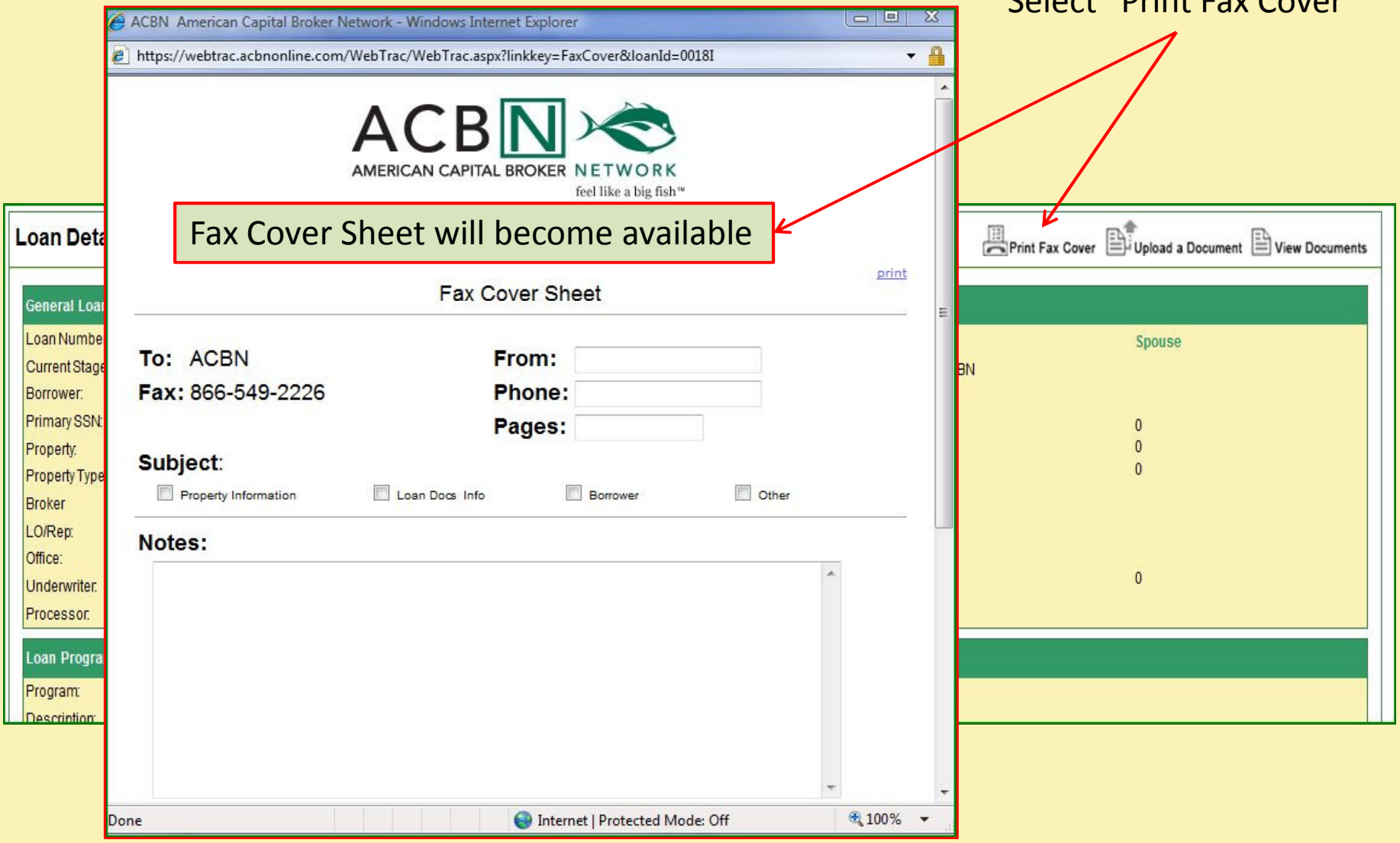
**Key Dates**

| | |
|---|---|
| Submitted: | |
| Locked: | |
| Lock Expiration: | |
| Clear To Close: | |
| Est. Closing: | |
| U/W Received: | |
| PAL Approval: | |
| Resubmitted: | |
| Approved: | |
| Approval Expiration: | |
| Suspended: | |
| Cancelled: | |
| Denied: | |
| Docs Ordered: | |
| Docs Drawn: | |
| Docs Sent: | |
| Docs Back: | |
| Note Date: | |
| Funded: | |

# Loan Details- Print a Fax Cover

## ACBN VALET

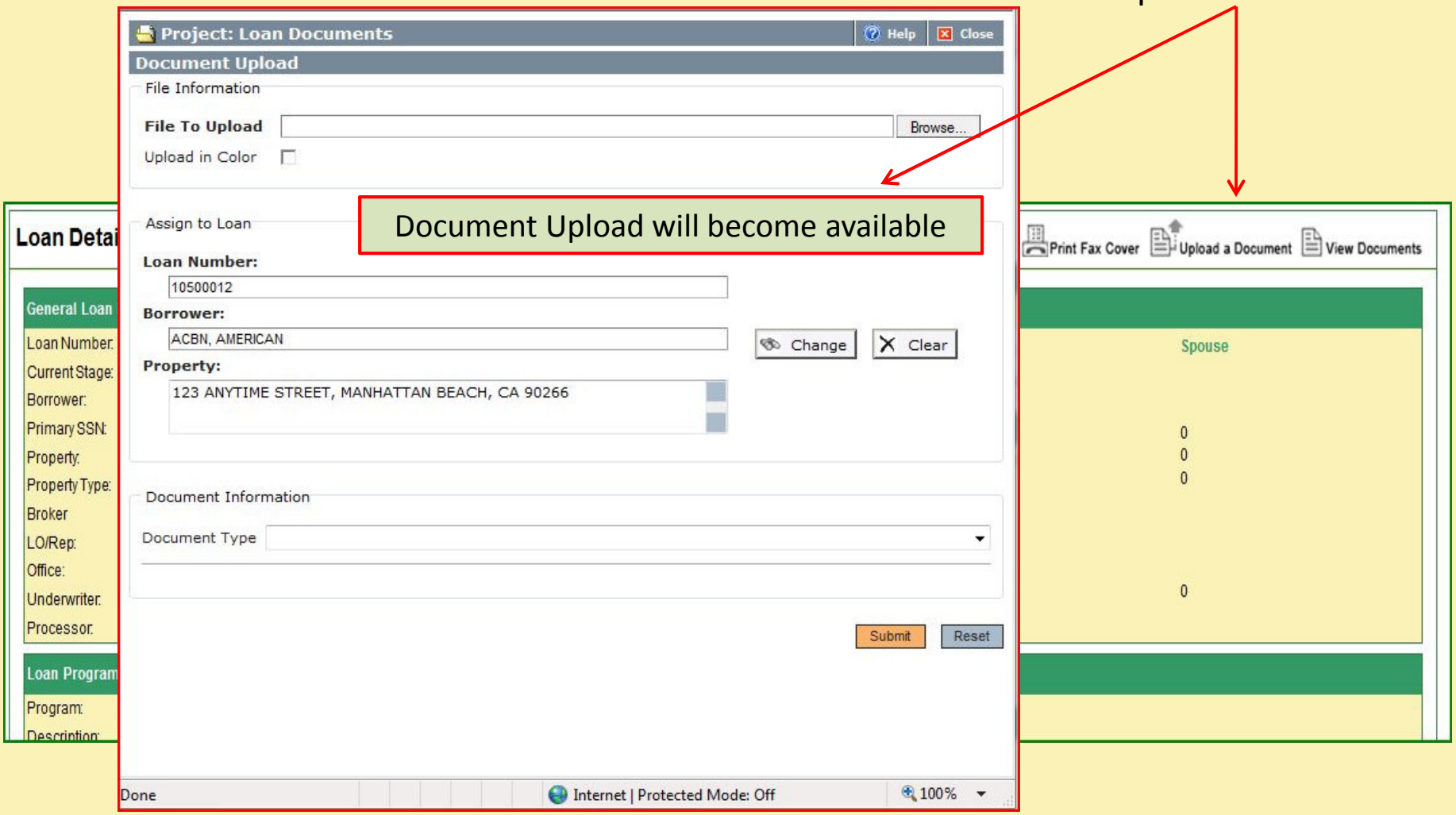
Select “Print Fax Cover”



# Loan Details- Upload a Document

## ACBN VALET

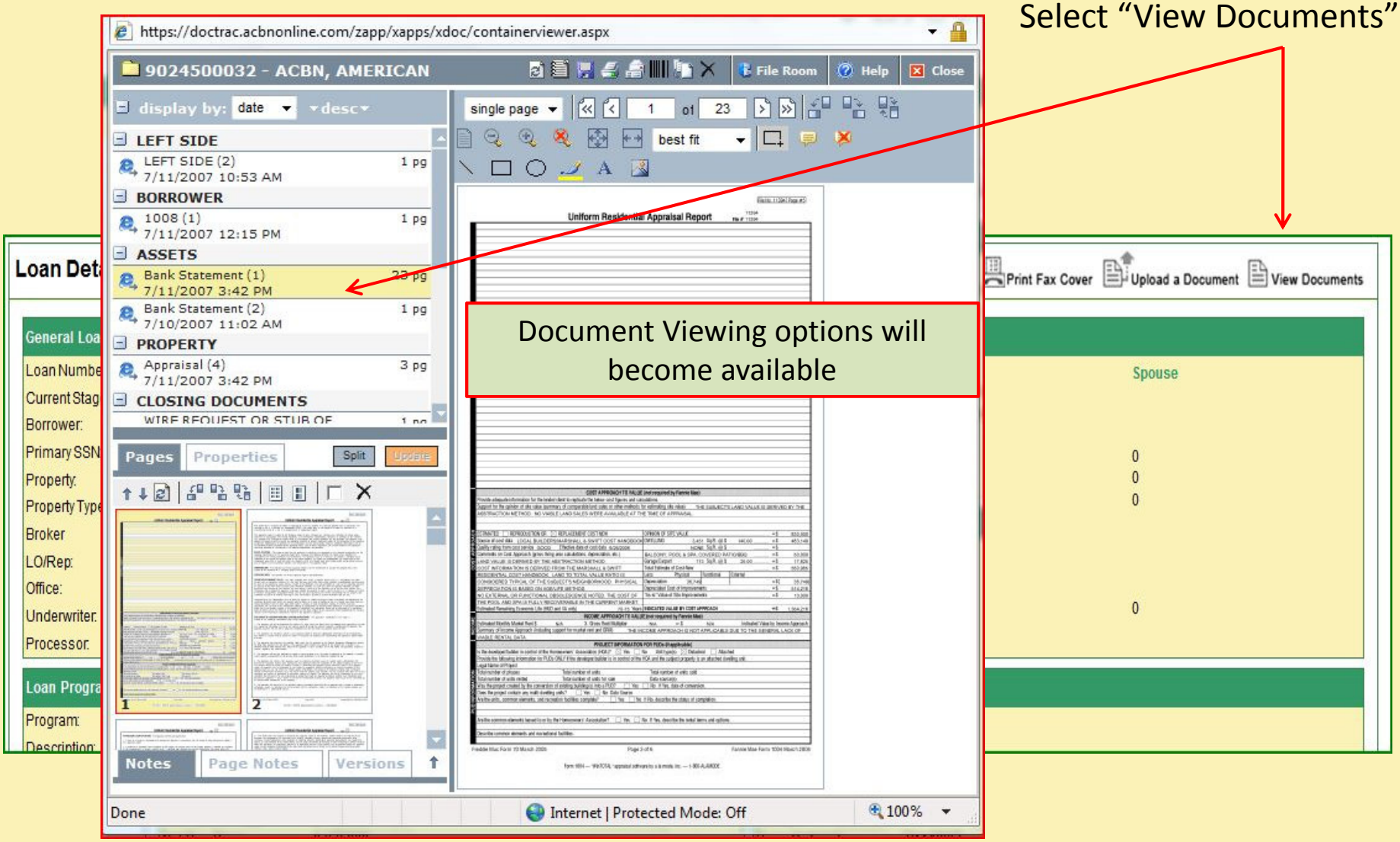
Select “Upload a Document”



# Loan Details- View Documents

## ACBN VALET

Select “View Documents”



# View and Add Notes

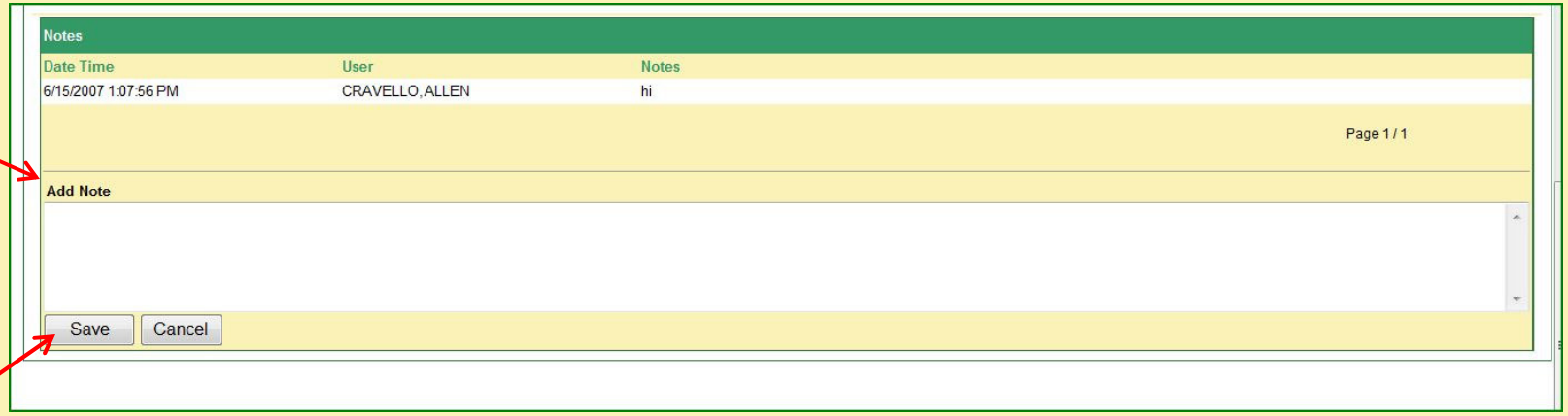
## ACBN VALET

To view or add notes, click on the yellow note icon, located on the Loan Pipeline page

| Loan# | Borrower | Program | Loan Amount | Lien | LTV | Registered | Locked | Lock Expire |
|---|---|---|---|---|---|---|---|---|
| 9024500032 | ACBN | | $760,000.00 | 1ST | 80.000 | 6/11/2007 | | |
| 10500008 | ACBN | | $760,000.00 | 1ST | 80.000 | 6/11/2007 | | |
| 10500011 | ACBN | 10/1 | $760,000.00 | 1ST | 80.000 | 6/15/2007 | | |
| 9024500025 | ACBN | | $760,000.00 | 1ST | 80.000 | 6/13/2007 | | |
| | ACBN | | $760,000.00 | 1ST | 80.000 | 6/19/2007 | | |

Add Notes

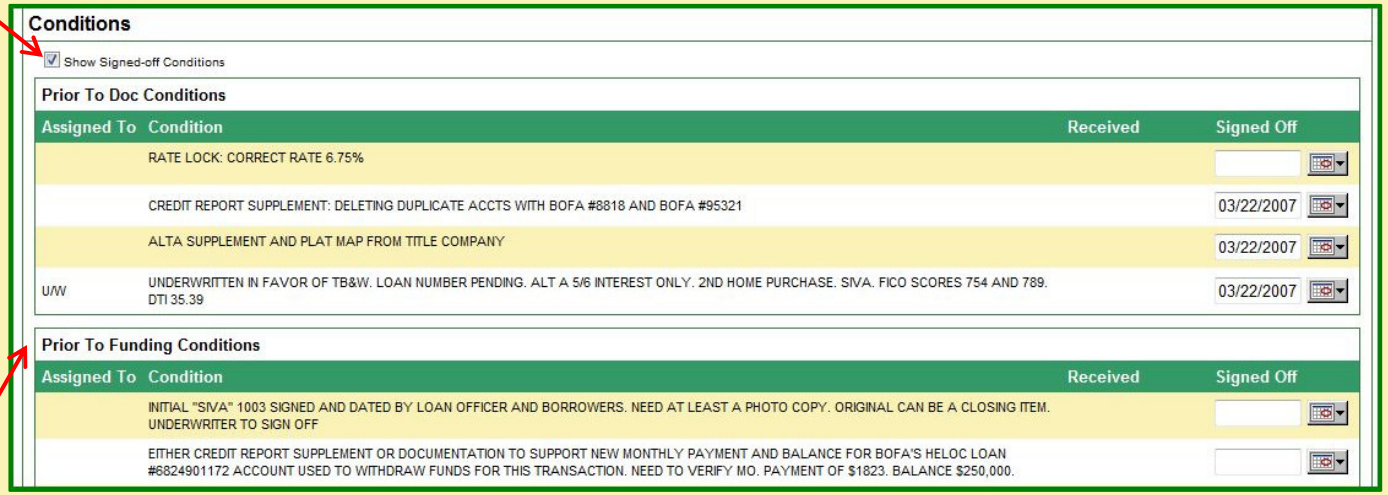
Click Save



# Conditions

## ACBN VALET

Check **"Show Signed-off Conditions"** to view all conditions

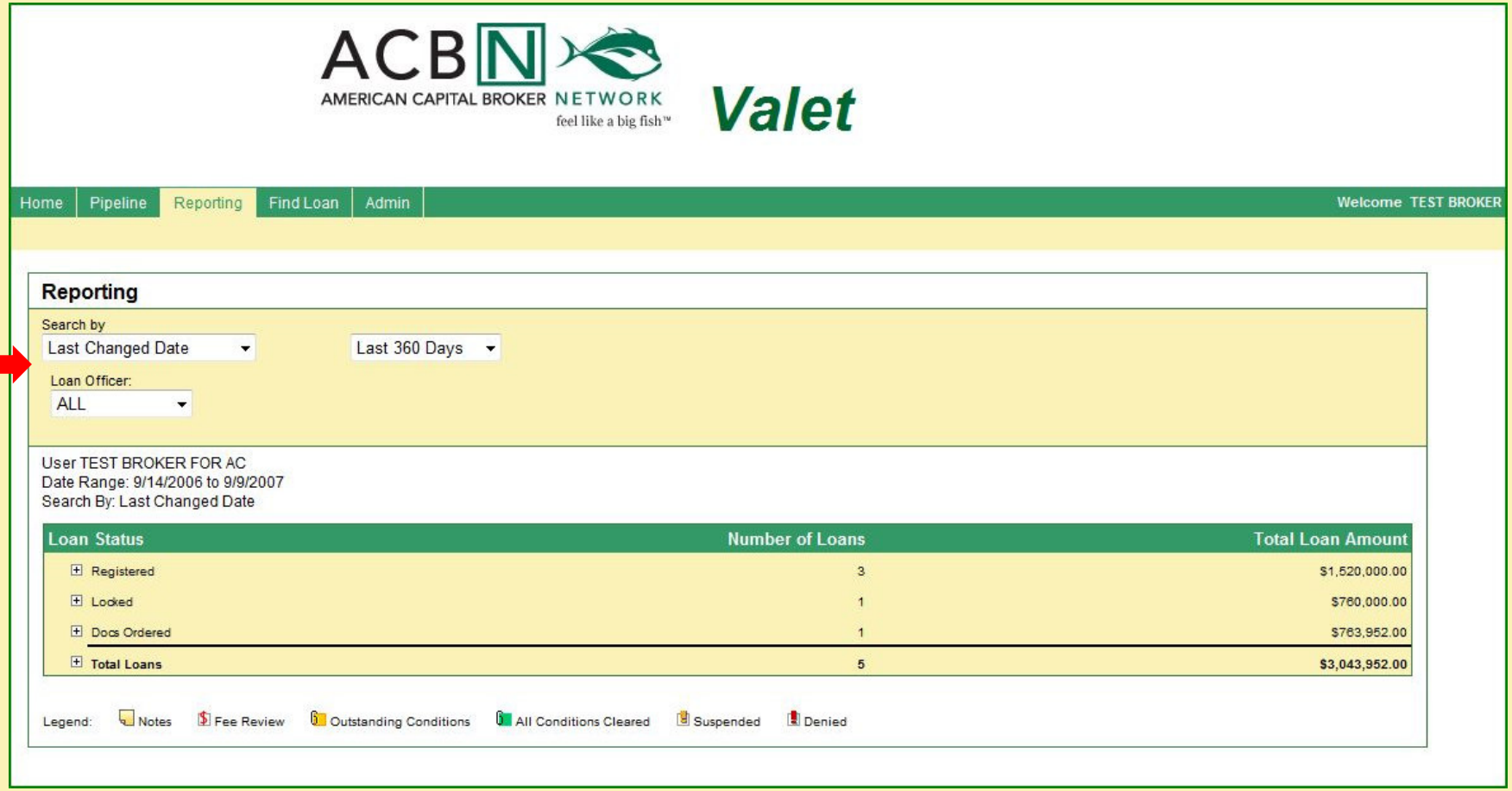



**You can then view Prior To Doc Conditions and Prior To Funding Conditions**

# Reporting

## ACBN VALET

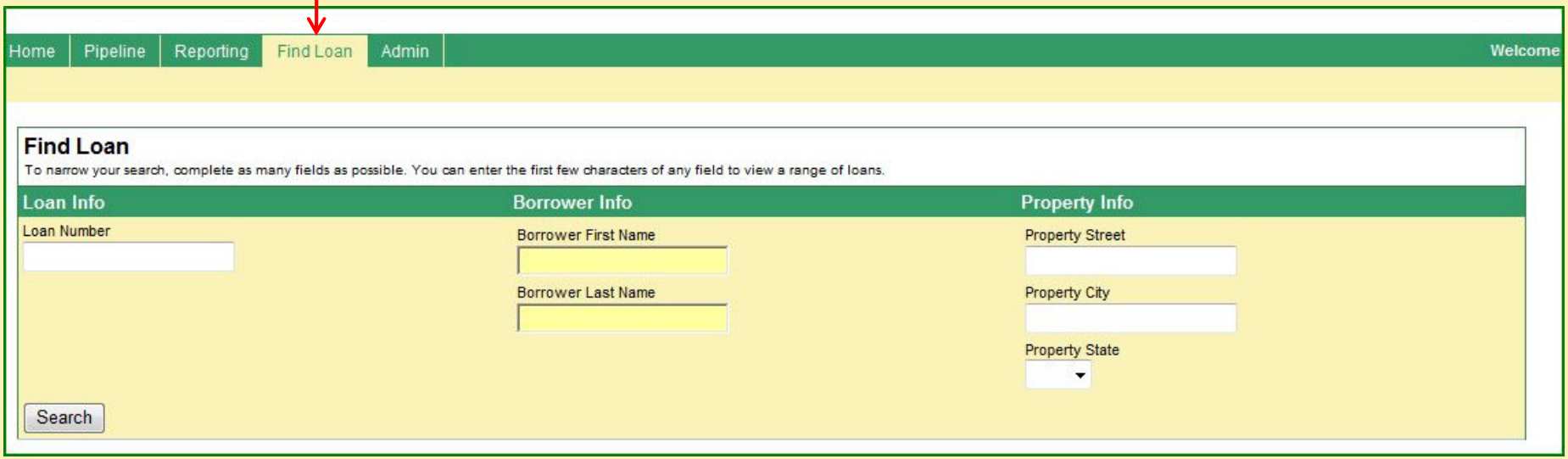
You can search for reports by date range



# *Find a Loan*

## ACBN VALET

Click here to Find a Loan




**To narrow your search, enter as much information as possible in the listed fields**

# Demo Complete!

***Thank you for your interest in ACBN Valet!***

Using ACBN Valet, you will be able to:

- Access the pipeline
- Check loan status
- Upload new loans
- Fax or upload conditions/documentation

For more information, please contact support@acbnonline.com

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