



Lakeview Naming Conventions Quick Reference Guide Correspondent

Last updated: February, 18, 2021



BEFORE You Name Your Loan File Documents

You have to come up with a loan file numbering system BEFORE the loan file is registered and uploaded on our system. See below for 3 suggestions if your shop does not have a numbering system in place. Best Efforts Submissions.

- Enter the Seller Loan Number when the loan is registered

Suggestions:

- Use the Loan Origination System assigned number.

Example: 564077801

- Use the AUS number assigned to your loan.

Example: 009711757

- House number and street name with NO spaces.

Example: 8153MapleCourt

Add New Loan
* = required field

General Loan Information

Seller loan number *

Program *

FHA Number

DO NOT USE “UNASSIGNED” , “TBD” , or all zeroes (000000) for the Seller Loan Number as your loan WILL NOT move into Underwriting.

The Seller Loan Number has to be unique to loan file and CANNOT be used again on another loan.

•The system requires the use of a unique loan number or file number, called the **Seller Loan Number**.

•Our system will also assign your file a loan number, but you **MUST** use **YOUR Seller Loan Number** when searching for your loans.

•After the Seller Loan Number is determined and entered, it is imperative that the person uploading the loan file documents, must use the EXACT SAME Seller Loan Number *to begin the file name for the document.*



Lakeview Naming Conventions

It is imperative that you follow our naming convention before uploading your files. This will ensure they are properly matched to their parent loan.

The person who will upload the documents will need to ALSO use the exact same previously entered Seller Loan Number to begin the file name. This will insure that the documents will be properly and correctly tied to the loan.

Example of loan document file names:

564077801_Royer_CreditandClosingPkg

The red portion is the **Seller Loan Number** that was entered when the loan was registered.

The green portion is the **borrower last name**.

The blue portion is a **description of the document**.

Note that each section is separated by an underscore, NOT a space or a dash/hyphen. You need to use an underscore.

If the Seller Loan Number is not the same in the document file name, your documents will not correctly be tied to the loan file.



Lakeview TDOC (Trailing) Documents-Naming Conventions

Any document uploaded after the initial documents are uploaded is consider to be a Trailing Document, TDOC for short. All of your trailing documents will be uploaded at the loan level.

To name your TDOC:

Start with the Seller Loan Number, underscore, borrower last name, underscore, TDOC Underscore description:

564077801_Royer_TDOC_Appraisal

The red portion is the **Seller Loan Number** that was entered when the loan was registered.

The green portion is the **borrower last name**.

The purple portion is the **TDOC** indicator.

The blue portion is a **description of the document**.

1. Click on the **Deliver Loans & Reporting/Deliver Loans** link under the **(3021)** or **(6033)** Bayview/Lakeview UW or **Closed** header.
2. For (3021), enter YOUR Seller Loan Number/loan or file number to search.
3. Use the **Upload TDOC Files (to THIS loan)** link to upload TDOCS (3021) or in the case of (6033), click the button labeled:

Upload Loan Images to 6033 - Bayview/Lakeview CLDD

