

LOAN SERVICING SOFT Adding a Borrower to a Loan:

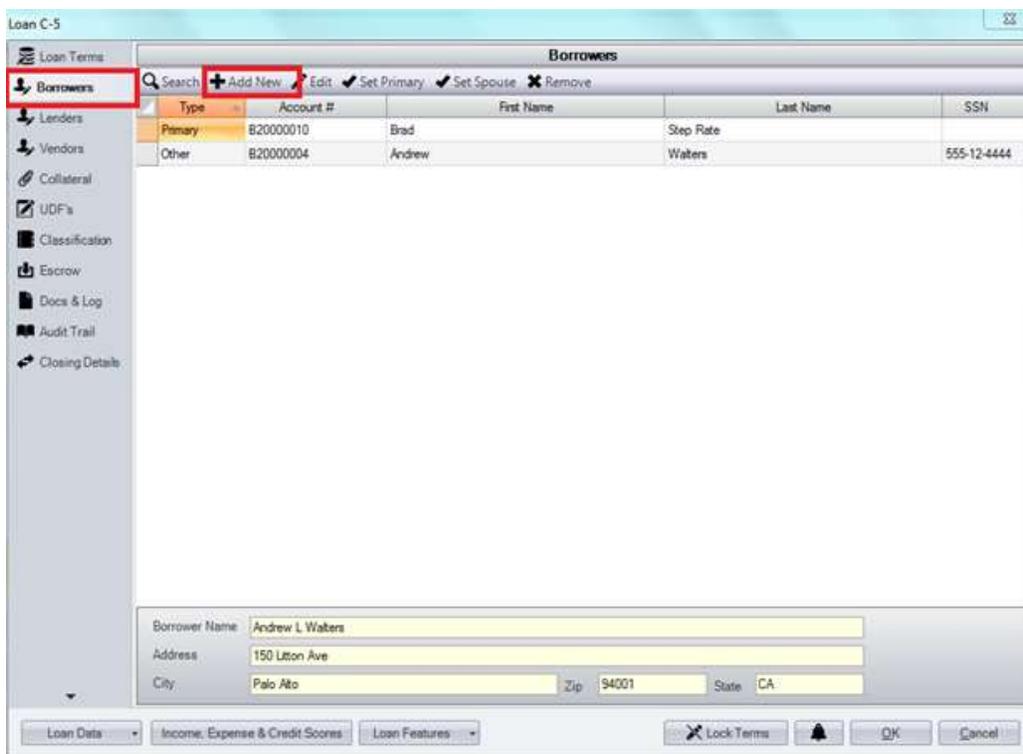
This document will guide you through the process of adding a borrower or co-borrower to a loan in LOAN SERVICING SOFT.

For additional information and/or questions please feel free to contact our support group at support@loanservicingsoft.com or 1-800-993-1839 x2.

Adding a borrower to a loan in LOAN SERVICING SOFT can be done in one of two ways. A new contact can be added to the system from the loan entry window then added as a borrower or co-borrower to the loan, or an existing borrower who is already in the system can be added as a borrower or co-borrower to a loan.

Adding a Borrower to a Loan During Loan Entry

From the loan object window, click on the borrower tab.



Click on the Add New button and a borrower window will appear.

The screenshot shows a software window titled "New Borrower" with a sidebar on the left containing navigation options: Personal Info, Classification, UDF's, Trust Account, ACH, Docs & Log, and Audit Trail. The main area is titled "Borrower Personal Info" and contains the following fields and controls:

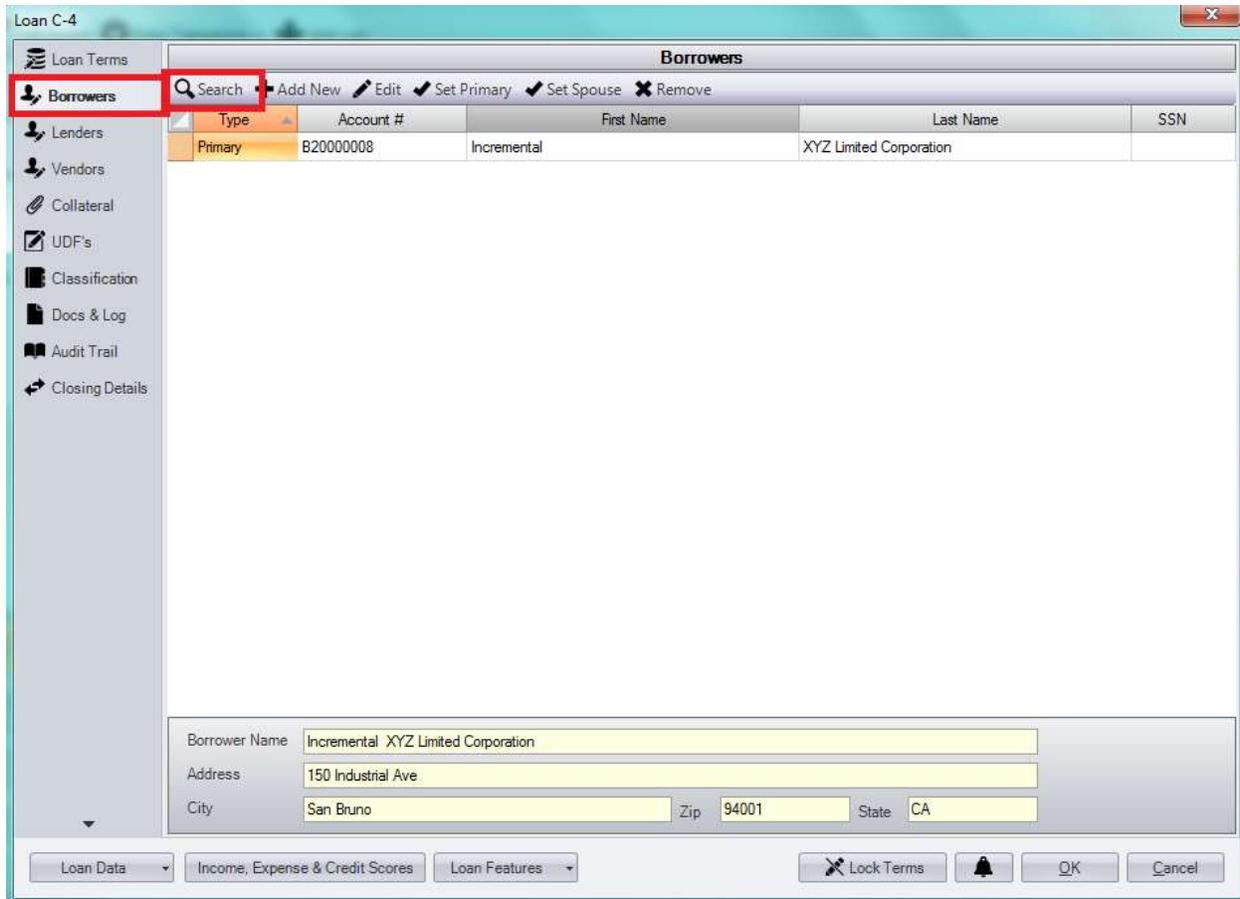
- Borrower # (text field)
- Auto Assign Number
- Company (dropdown)
- First Name (text field)
- MI (text field)
- Last Name (text field)
- Address (text field)
- City (text field)
- State (text field)
- Zip (text field)
- Country (text field)
- Phone 1 (text field)
- Ext. (text field)
- Phone 2 (text field)
- Phone 3 (text field)
- Fax (text field)
- E-Mail (text field)
- POC (text field)
- SSN/EIN (text field)
- IN Type (dropdown menu, currently set to SSN)
- Web Site (text field)
- Alt. Contact # (text field)
- Date of Birth (dropdown menu)
- Driver Lic. # (text field)
- Check Pay To Name (text field)
- Active
- Web Enabled
- Web Password (text field)
- Notes (text area)

At the bottom of the window, there are buttons for "Display Loans", "HMDA Info", a bell icon, "OK", and "Cancel".

This is where all of the information on your new borrower will be added. Once all of the appropriate information for the borrower has been entered, click OK. The new borrower will be added to the list of borrowers for the loan.

Adding an Existing Borrower to a Loan

A borrower who already exists in the system can also be added as a borrower or co-borrower to a new loan. From the loan object window, click on the borrower tab. Find the existing borrower by clicking the Search button.



A list of the borrowers currently in the system will appear. Find the one you would like to add as a borrower to the loan and double-click on it. The existing borrower will be added to the loan.