

LOAN SERVICING SOFT Servicing Company

This document will guide you through the process of setting up your Servicing Company 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.

The LOAN SERVICING SOFT system allows you to set up one or more servicing companies that can then be assigned to your loans, as the official servicing entity.

To set up your Servicing Company information go to Control Panel > Servicing Companies.

The screenshot shows the LOAN SERVICING SOFT interface. On the left is a 'My Portfolio' sidebar with a 'Control Panel' menu. The 'Servicing Companies' option is highlighted. The main area displays the 'Servicing Company' form. The form has a header 'YOUR SERVICING COMPANY NAME' and a 'Company Info' section. The 'Company Info' section includes fields for Company Name, Account Number, Federal TIN / EIN #, NMLS License #, State Tax ID, State License #, Phone Number 1, Phone 2, E-Mail Address, Fax, Servicing Manager, Servicing Account, and Impound Account. The 'Address' section includes fields for Address, Suite #, City, State, ZIP, Country, and a 'Show on Map' button. The 'Web Settings' section includes fields for Company Website, Borrower Portal URL, Web ID, Web Enabled, Lender Portal URL, System Code, Vendor Portal URL, and User Portal URL. The form has 'OK' and 'Cancel' buttons at the bottom right.

Be sure to enter your Servicing Company Name and contact information in the Company Info section. Also be sure to select a Servicing Account (or Trust Account/Bank

Account) for loans and loan payments assigned to this Servicing Company. And then be sure to fill out the address information in the Address section.

That will be it for your initial set up. You can come back to this section to enter information, your servicing company account information, etc.. for things like pulling credit reports, running ACH, doing e-signature, etc...