



FOUNDATION  
MORTGAGE

Register a New Loan

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# How to search product and pricing

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**Below are the steps needed to register a new loan. Log on to the Foundation Portal, select the Add New Loan. Once the popup appears proceed to Step 1.**

# Step 1

- Select the Main Point of Contacts for Loan Officer and Loan Processor.
- 
- NOTE: These are the Key Contacts throughout the transaction. If the user who will be working the loans is not listed. Please reach out to [EncompassSupport@foundationmortgage.com](mailto:EncompassSupport@foundationmortgage.com).

Register Wholesale Loan

Choose Contacts

LOAN OFFICER

Organization

Test Broker Originator

User Name

Test Company LO User

LOAN PROCESSOR

Organization

Test Broker Originator

User Name

Test Company Processor User

Cancel

Next

# Step 2

- Select Import Loan Data From ULAD/iLAD (MISMO 3.4) File if you would like to import your 3.4 file.
- Select Manual if you would like to manually key in the borrower information. (We suggest using your 3.4 file)

Register Wholesale Loan

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

Drop Here to Upload or

Click to Browse

Please Note: Downgrading a 3.4 file to a 2009 URLA may cause lost or inaccurate data.

Back

Cancel

Next

# Step 3

- Verify the terms are accurate in the Quick Registration Screen. In the “Loan Details” Section add the below information:
- Decision FICO
- Loan Documentation Type
- Validate if Lender Paid or Broker Paid, Loan amount, Term and if a Lender Fee Waiver

Decision FICO

Lien Position

First Lien

Base Loan Amount

\$300,000.00

Loan Type

Conventional

Purpose of Loan

Purchase

Purchase Price

\$340,000.00

PMI Coverage

MIP

☐ Lender Paid Mortgage Insurance

MI, MIP, FF Financed

Loan Documentation Type

Select an Option

Term Months

360

Due In

Impound Waiver Type

Waived

Interest Only Months

LO Compensation Paid By

☐ Borrower
 ☒ Lender

Lender Fee Waiver

☐ Yes
 ☐ No

# Step 4

- At the bottom right, select "Register"
- Your loan is now registered and has been assigned a new loan # with Foundation.
- Follow the next steps on selecting product and pricing and how to submit a new loan.

Register

<b>Ken Customer</b> 10655 Birch St, Burbank, CA, 91502... 01- Test Company	Loan #	230312916	Loan Purpose	Purchase	Total Loan \$	\$300,000.00
	DTI %	13.353%	Loan Type	Conventional	Submission Status	-
	LTV %	88.235%	Interest Rate	4.250%	Cash to Close	\$32,322.80



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THANK YOU

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