# Freddie Mac

**SBL Pipeline Manager (SBL PM)**

**Version 6.0**

**External User Guide**

**Febuary 11, 2019**

## Contents

# 1 Overview

The purpose of this document is to provide an overview of the SBL Pipeline Manager (SBL PM) application and to provide a guide that describes how to use the application. For the remainder of the document we refer to the tool as “SBL PM” or “the tool.”

# 2 Background

SBL PM is an externally hosted, web-based tool that enables Sellers and Freddie Mac to monitor the pipeline of Small Balance loans. The objective of this too is to improve the efficiency of entering new small balance deals into the pipeline, updating information on these deals, and reporting on the pipeline.

# 3 Application Overview

SBL PM is a website that provides Sellers and Freddie Mac with information about Small Balance deals. It creates a centralized location to store this data with a uniform method to create the data. It allows all users to review and update their pipeline of deals.

SBL PM provides users with a combination of standard and custom reporting capabilities. Most of the reports are interactive in nature, allowing the user to apply custom settings to the report and export report content into various formats.

# 4 Minimum Browser Requirements

The minimum required browser is IE 7.  Users on IE6 and below WILL NOT be able to access SBL PM. The minimum browser version outside of IE is unknown (eg: Chrome, Firefox).

# 5 SBL PM Support

Servicer user support for SBL PM:

- For any SBL PM issues, please contact email to SBL_Production@freddiemac.com

# 6 Accessing SBL PM

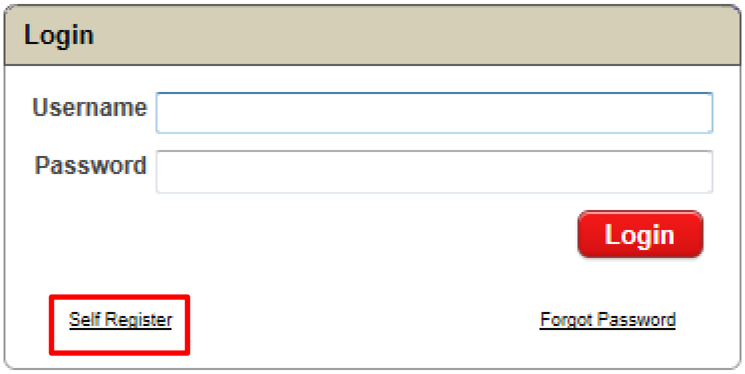
This section describes how to access SBL PM.

## 6.1 Website URL

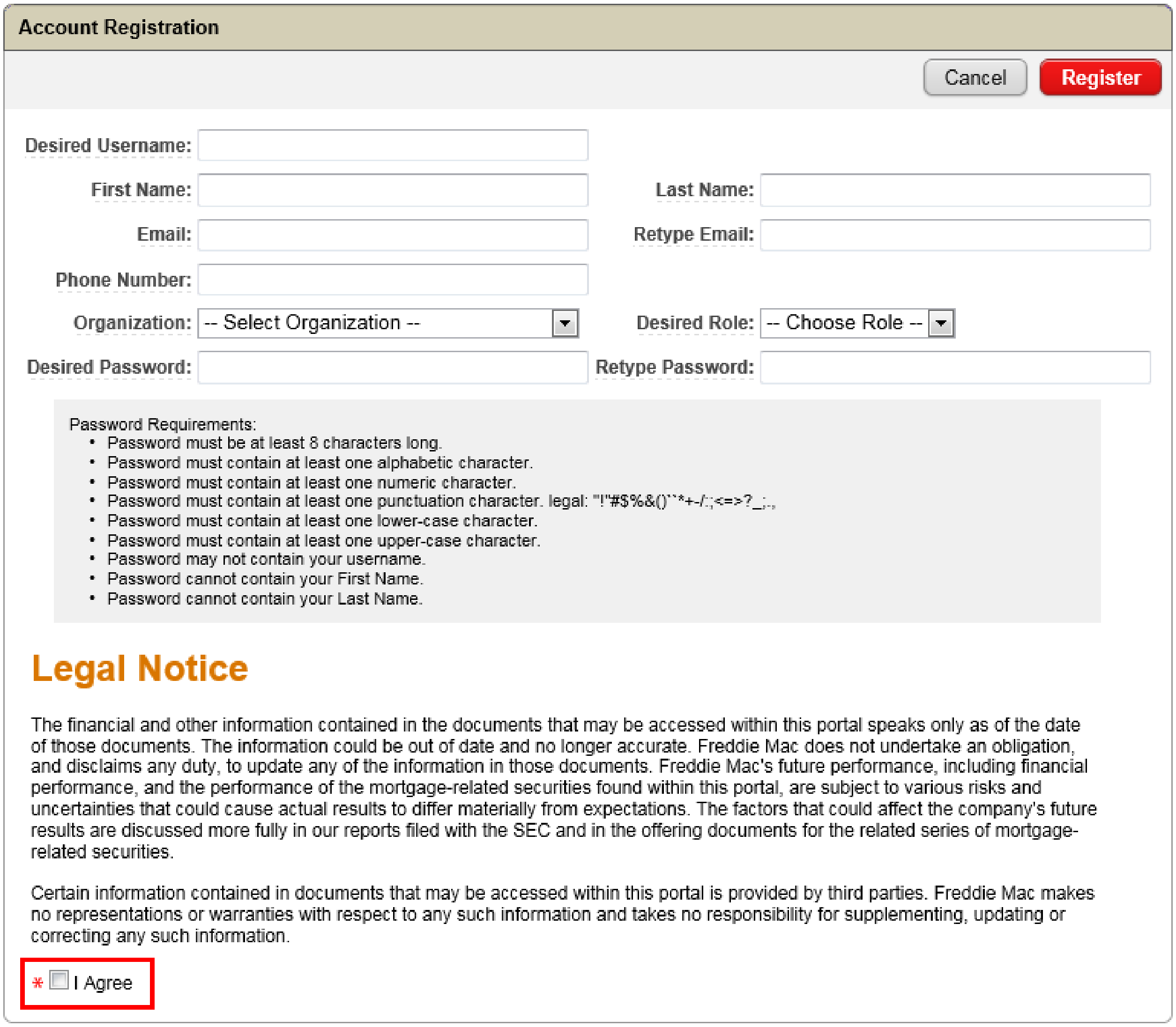
Users can access the application via the following URL:[https://sbl.ficonsulting.com](https://sbl.ficonsulting.com). If the application fails to load, ensure the URL is using the https protocol.

## 6.2 Initial Registration and Login

Users can self-register for the application using the Self Register link on the Login screen:




Clicking the self-registration link will display the Account Registration form below. The users must enter all data on the screen.  The user is required to accept the terms and conditions of use as part of the registration process by clicking the ‘I Agree’ box at the bottom of the screen. After populating all data, click ‘Register’ to submit an access request, or ‘Cancel’ to discard changes.



**Account Registration**

Cancel | Register

Desired Username:

First Name: Last Name:

Email: Retype Email:

Phone Number:

Organization: -- Select Organization -- Desired Role: -- Choose Role --

Desired Password: Retype Password:

Password Requirements:

- Password must be at least 8 characters long.
- Password must contain at least one alphabetic character.
- Password must contain at least one numeric character.
- Password must contain at least one punctuation character. legal: "!"#$%&()``*+-/:;<=>?_;.,
- Password must contain at least one lower-case character.
- Password must contain at least one upper-case character.
- Password may not contain your username.
- Password cannot contain your First Name.
- Password cannot contain your Last Name.

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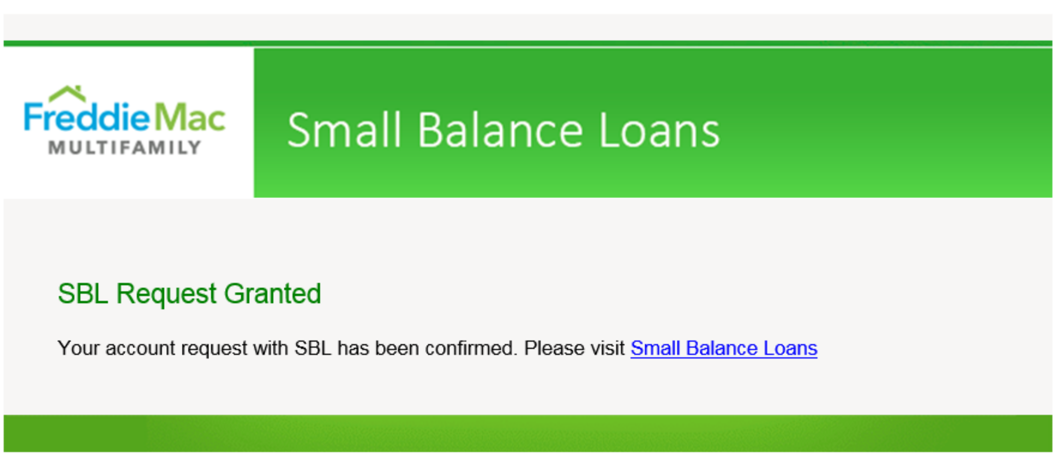
* I Agree

Selecting the 'Register' button will notify Administrators of the system of a request for access. Once a user is confirmed and granted access by an Administrator, the user will receive the email below indicating their account is ready for use:



FreddieMac MULTIFAMILY

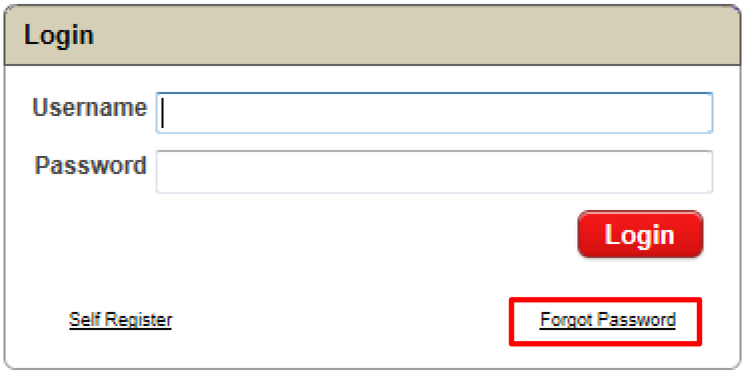
Small Balance Loans

SBL Request Granted

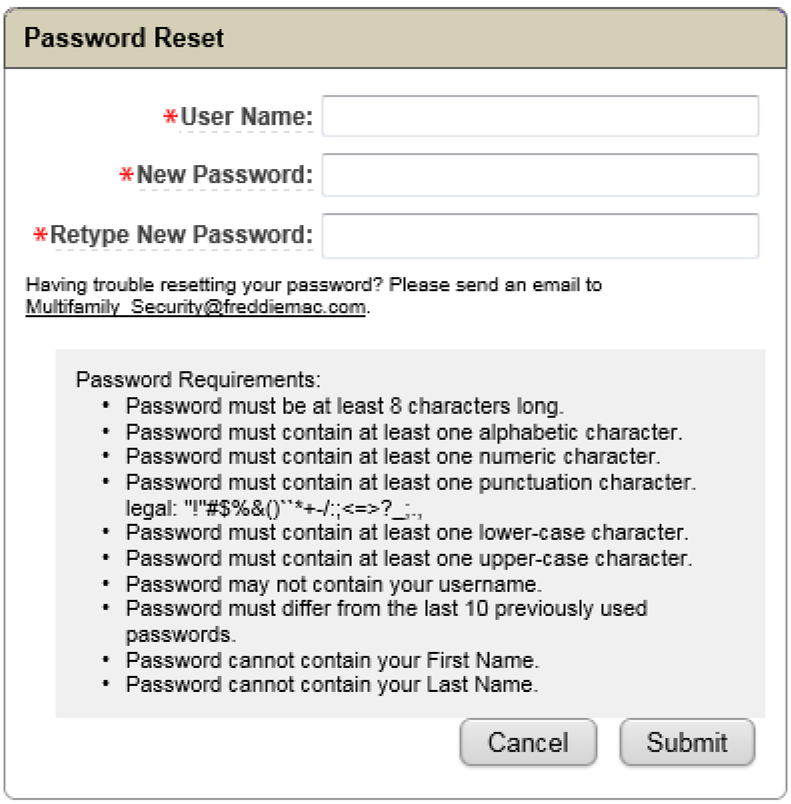
Your account request with SBL has been confirmed. Please visit Small Balance Loans

### 6.3 Forgotten Passwords

A user can click on the ‘Forgot Password’ link on the SBL PM Login page as indicated below to request a password reset. .




Clicking on ‘Forgot Password’ will bring the user to the Password Reset page. The user enters their User Name and a new password. Clicking ‘Submit’ will generate an email to the account associated with the User Name. ‘Cancel’ will discard the action.




As of SBL PM 2.0, the Password requirements are displayed at the bottom of every page where a password is created.

Additional PM SBL login features include:

- Maximum of four (4) login attempt failures.
- (5 seconds X n) lockout period between failed login attempts where N is the number of failed login attempts.

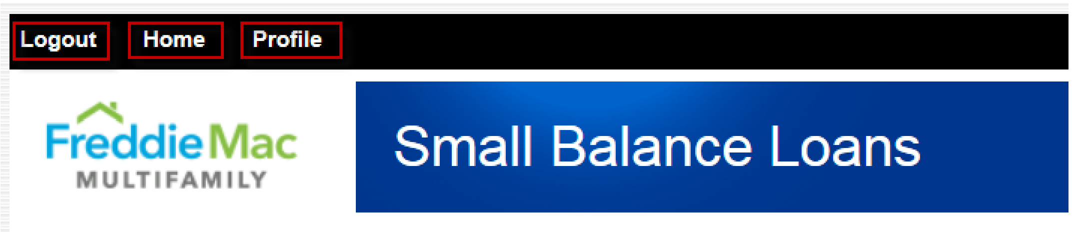
# 7 Application Navigation

## 7.1 Overview of Application Navigation

Application navigation is primarily from the menus at the top and left side of the screen. The top menu consists of the Logout, Home and Profile menu choices. The left side menu consists of navigation sections, with menu commands grouped by function as defined by the section header, such as Main Menu, Pipeline Reports, and Administrator Menu (Admins only). The left side menu is what the user will use most often.

## 7.2 Top Menu

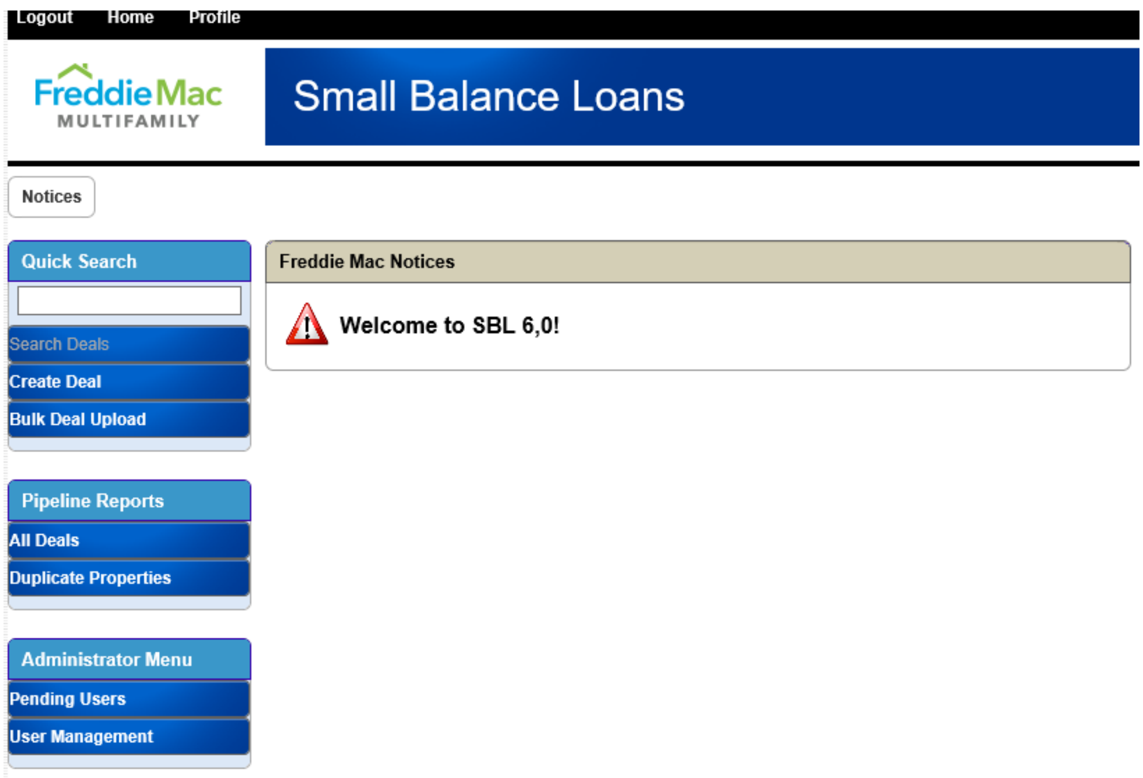
The top menu contains the Logout, Home, and Profile options. These buttons are available from any web page in the Tool.




**Logout**: Selecting logout allows users to end their session at any time.

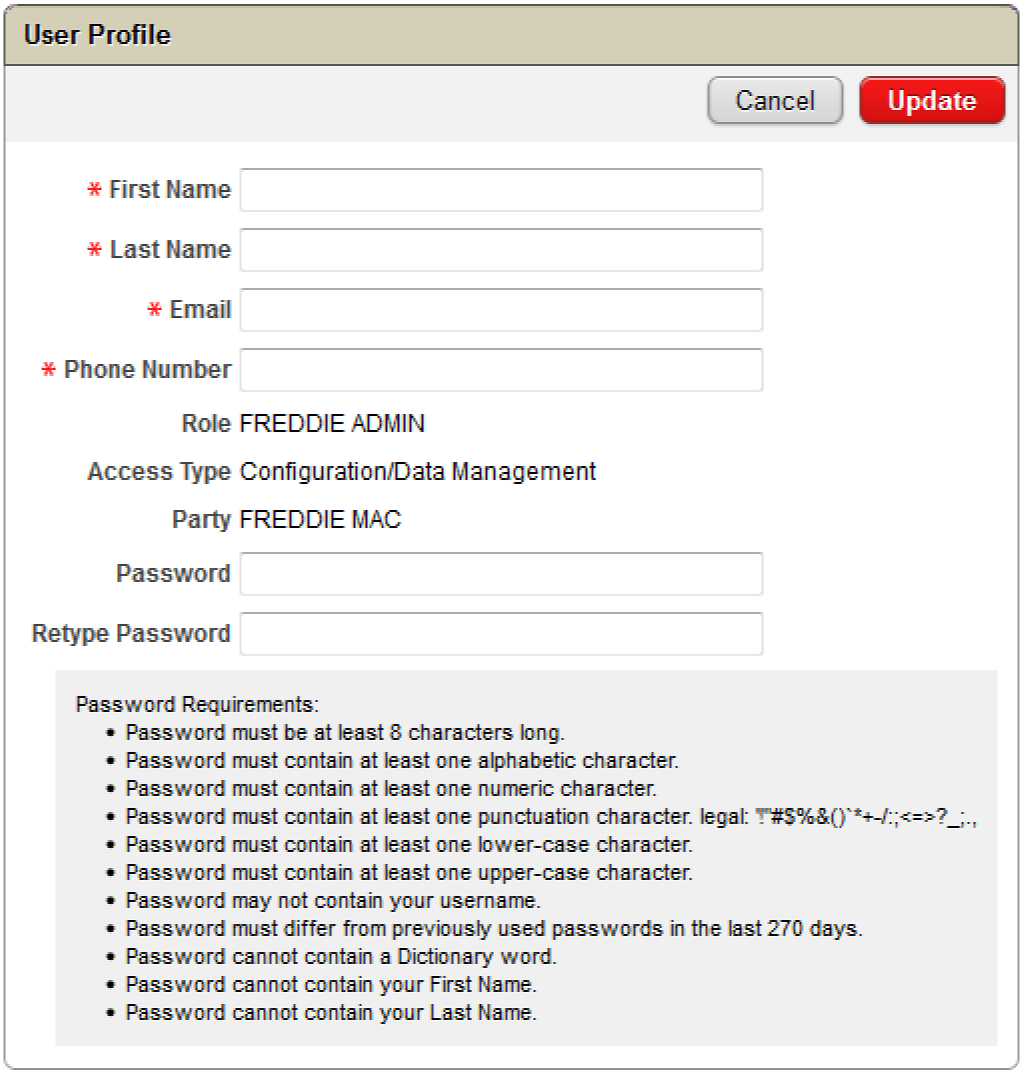
**Home**: Selecting Home brings users to the Notices page. The home screen displays notices that are pertinent to all users, such as system maintenance schedules, and user support options.

**Profile**: Selecting Profile allows users to see their user information. See section 7.3 for more details.



### 7.3 Updating the User Profile and Changing Your Password After Login

After logging in, users can change their passwords and update other profile information at any time by clicking on the Profile link in the upper left hand corner of the screen. Users can modify their First Name, Last Name, email address, phone number, or update their password. Users cannot modify their Role, Access Type or Party. Administrators can edit these properties for each user if necessary; see section **Error! Reference source not found.** for more details.




### 7.4 Left-Side Menu Bar Options

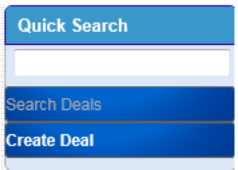
The left-side menu is where most of the functionality, commands and navigation links reside. The sections of the menu bar consist of Quick Search, Pipeline Reports, and Administrator Menu.

### 7.5 Quick Search

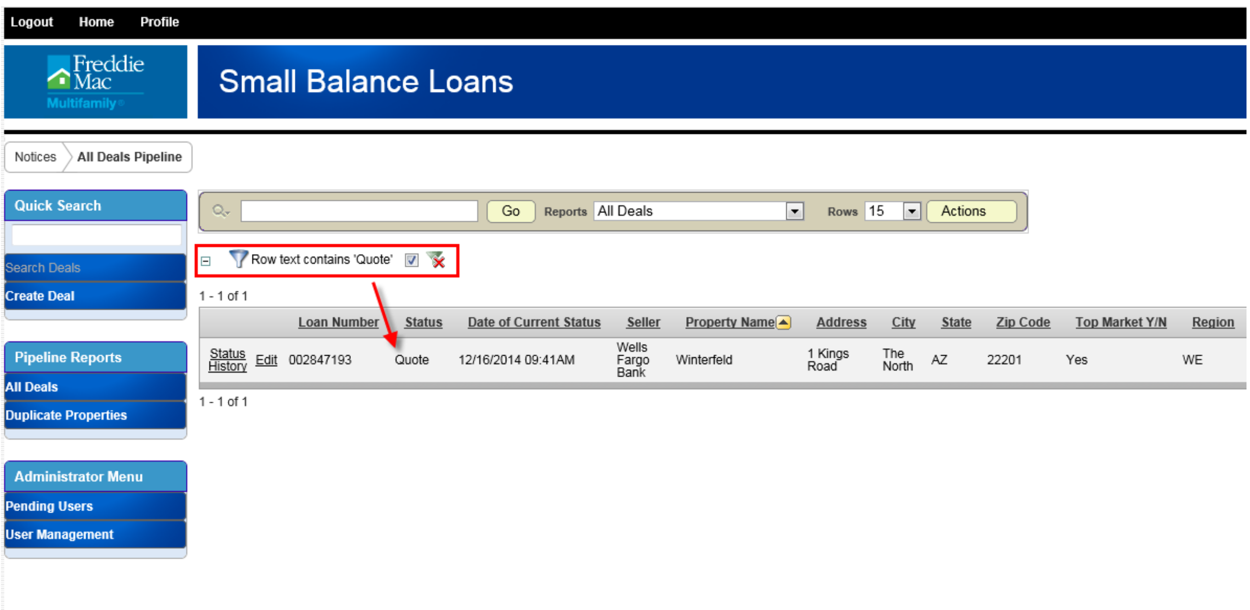
The Quick Search menu has two options, Search Deals and Create Deals.

#### 7.5.1 Search Deals

Upon entering text into the search box, the Search Deals button activates.

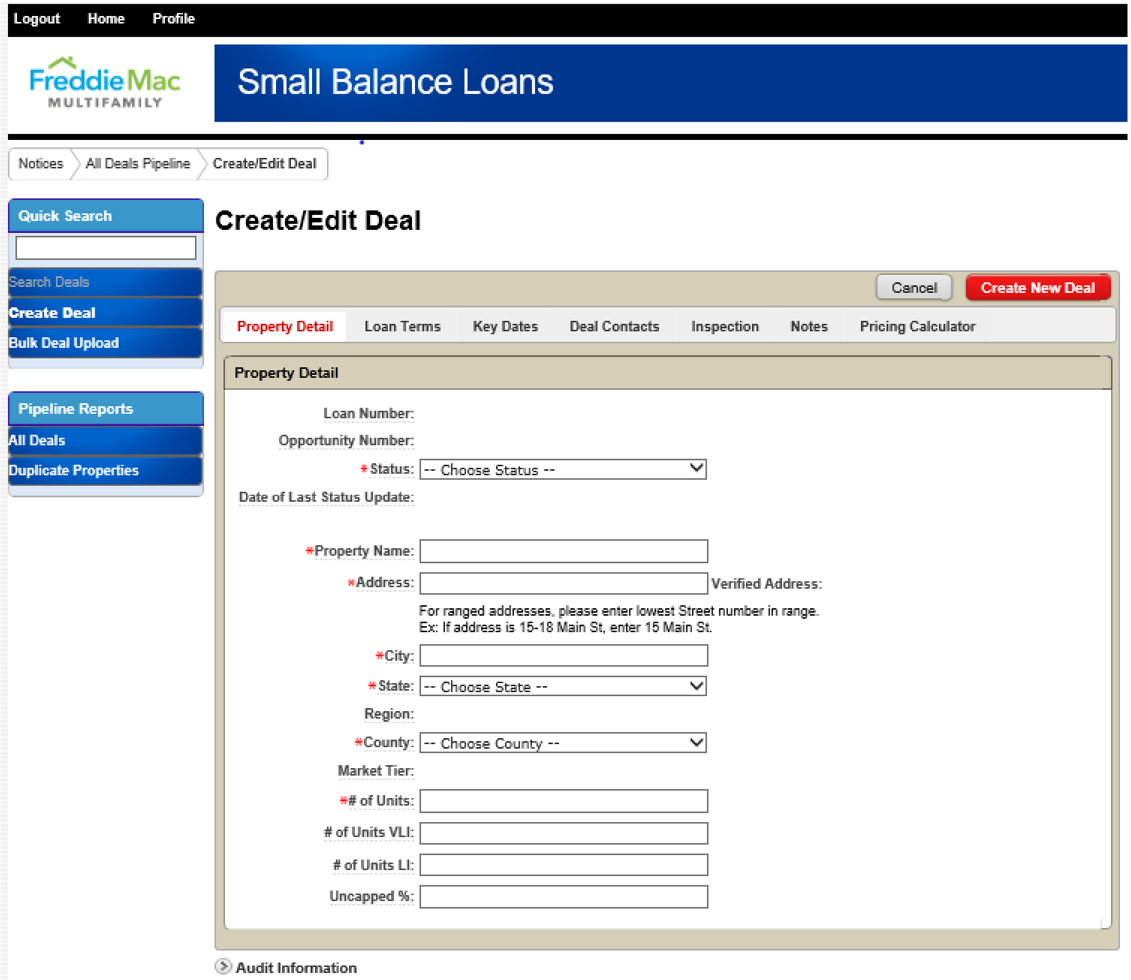



Clicking Search Deals will search all columns in the default pipeline view for the word in the search box.



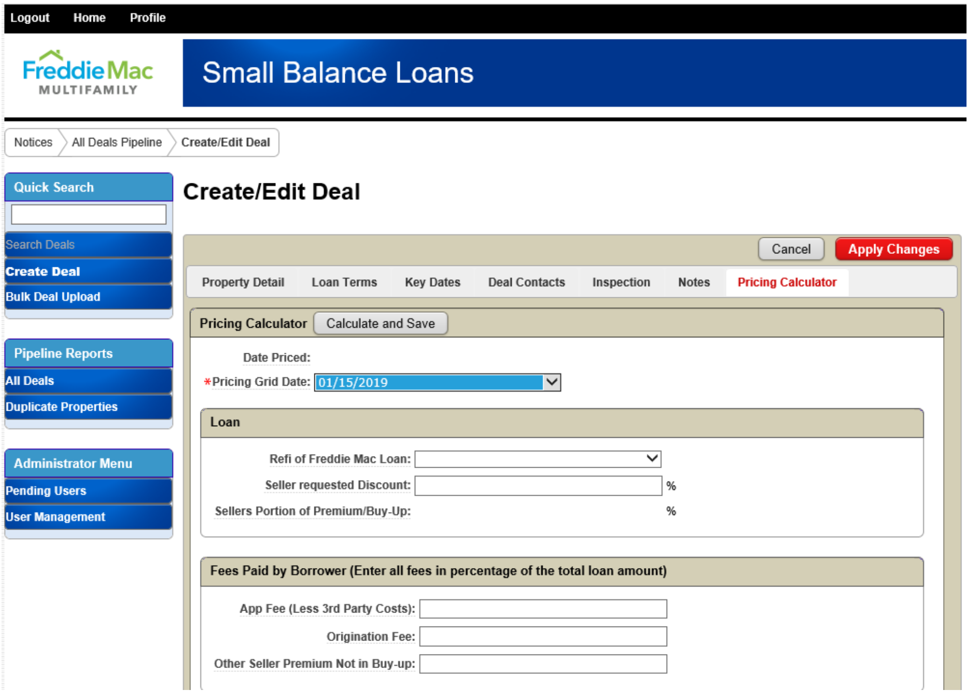

#### 7.5.2 Create Deals

The Create Deal button will load the Create/Edit Deal screen.

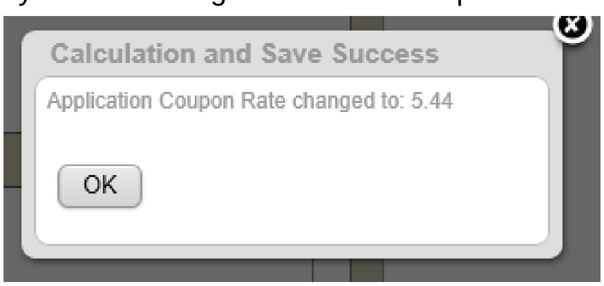



Create Deal is 2 step processes:

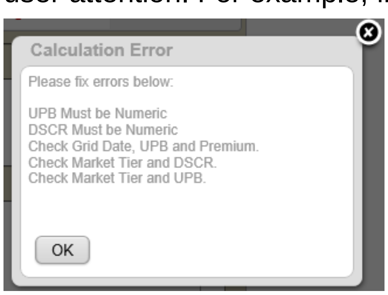
Step 1: Users must enter a value in every field marked with a red asterisk. Upon entering the required data, the user can click the Create New Deal button. This will create a new record in the system and bring the user to Create/Edit Deal screen. Clicking the Cancel button will return the user to the Pipeline screen without creating a new record.



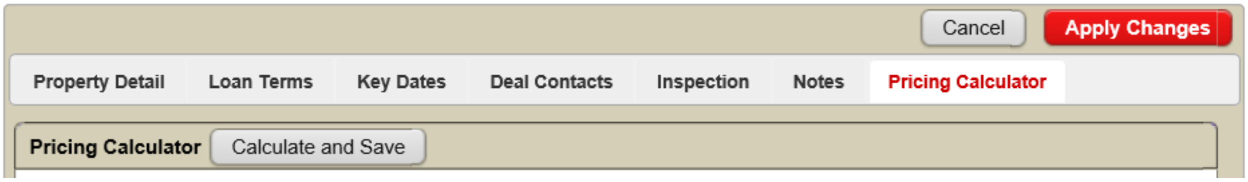

Step 2: Click on **Pricing Calculator** Tab. You will now see “Calculate and Save” button. Click on “Calculate and Save” button. In case of no errors “Calculation and Save Success” message box will be displayed with updated “Application Coupon Rate” and also Pricing calculation history is saved. Click OK. If you Click the Apply Changes button will update record in the system and bring the user to the Pipeline screen.




In case of errors, Calculation Error message box will display with the possible fields that needs user attention. For example, if UPB must be numeric, you need to enter valid number for UPB.

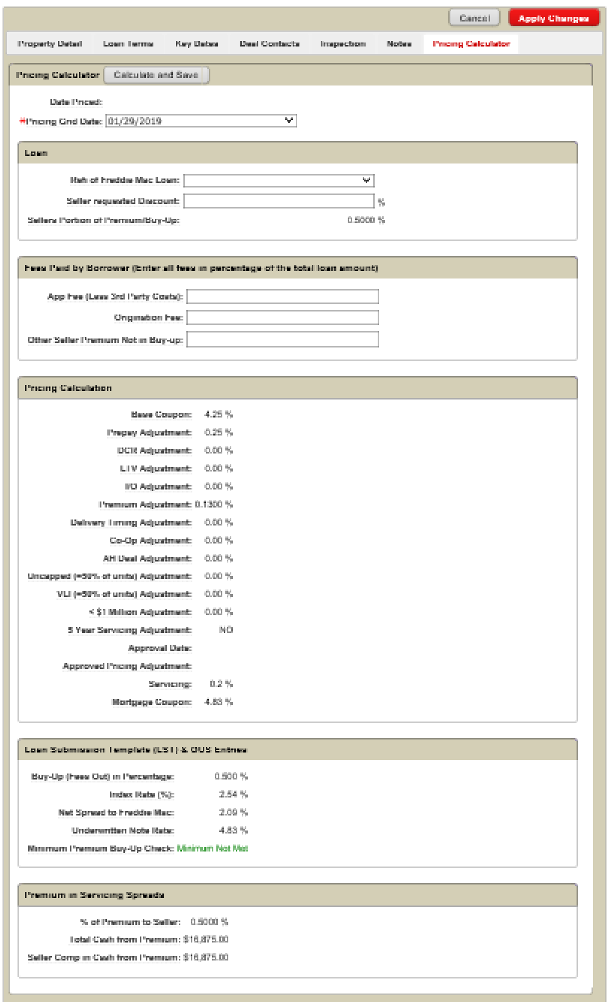


**Calculate and Save Button**:



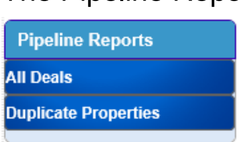

If you Click the Calculate and Save button, will do all the Pricing calculations and will save the history. You can see all the calculations as shown below picture.

Create/Edit Deal

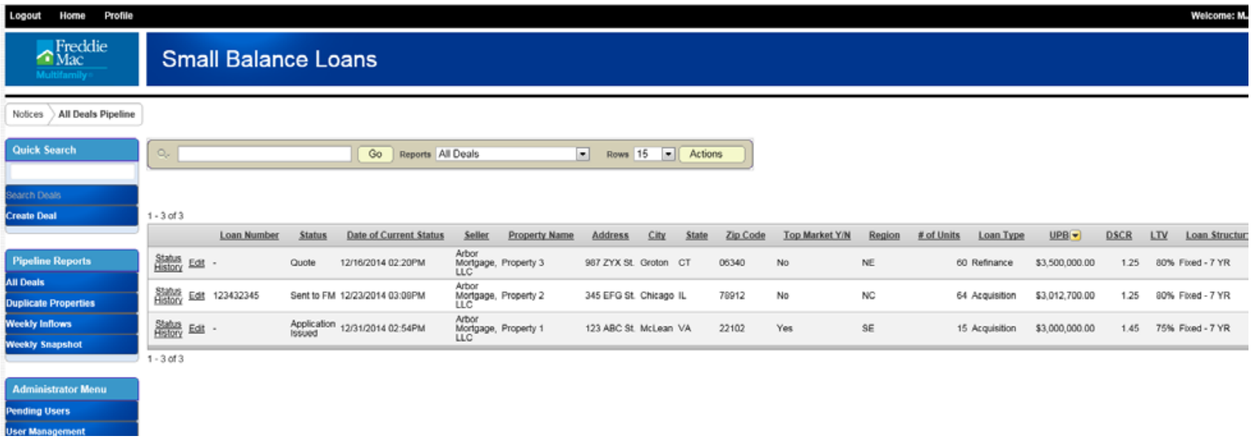



## 7.6 Pipeline Reports

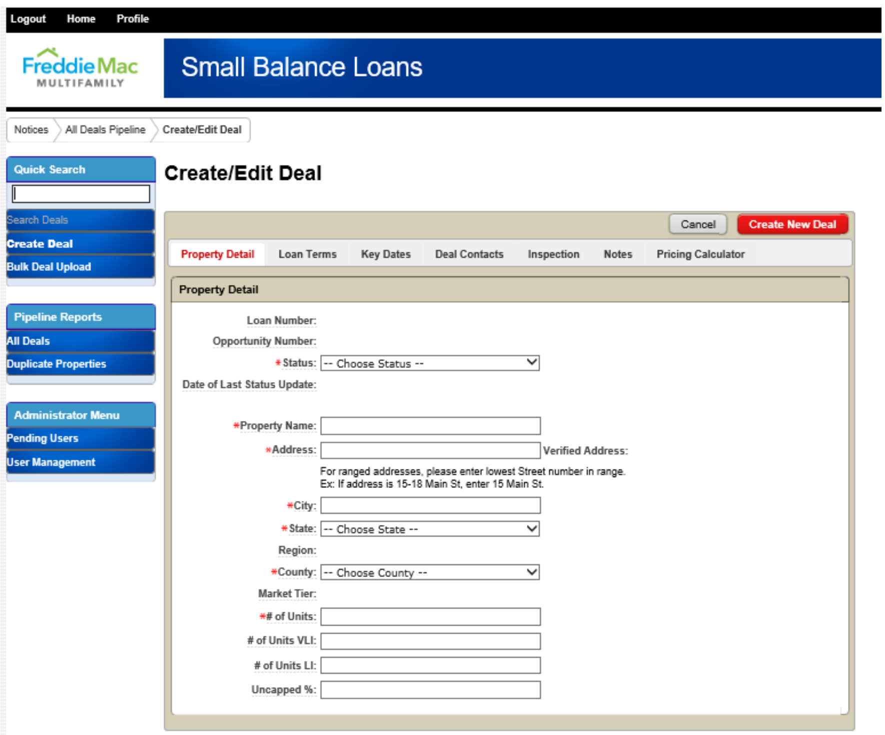
The Pipeline Reports menu has two buttons, All Deals and Duplicate Properties.



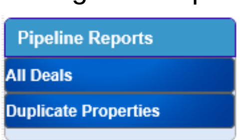
The All Deals button will load the Pipeline Screen.



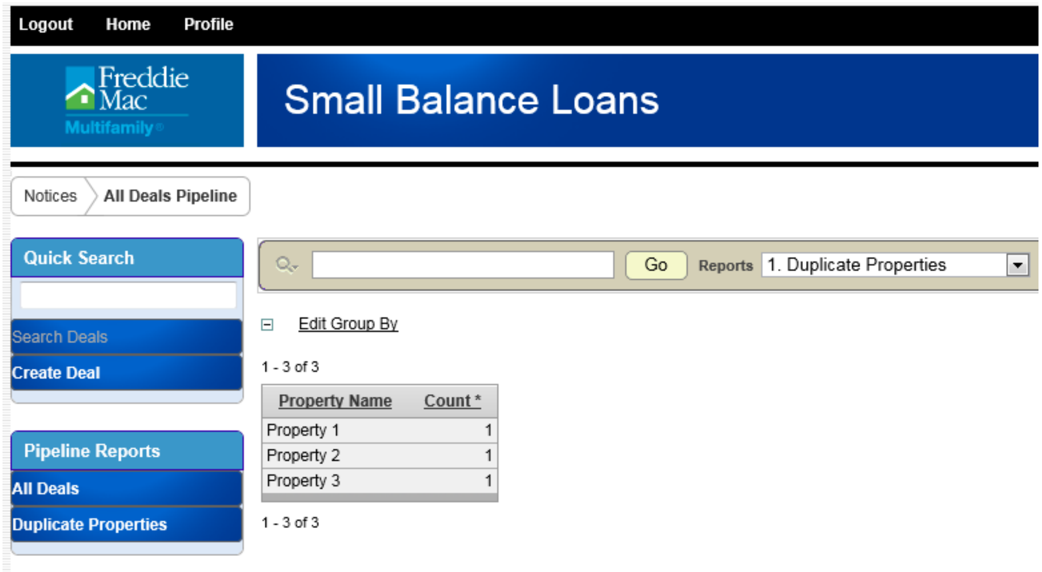

Each deal in the Pipeline has a Status History and Edit Link. The Edit link will load the Create/Edit Deal screen for the selected deal allowing the user to update and save the deal.




The Cancel button will discard the user's changes and return to the Pipeline screen. The Apply Changes will update the deal and return to the Pipeline screen.

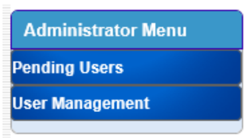



The Duplicate Properties button will open the Duplicate Properties report. This report displays all Property Name with a Count of each name. This screen will allow users to easily identify duplicate property names.

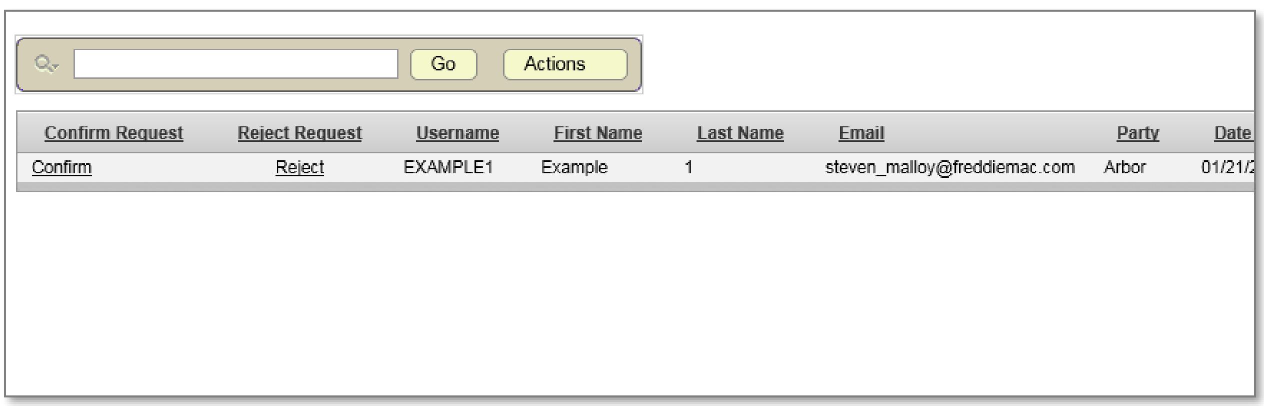



### 7.7 Admin Menu

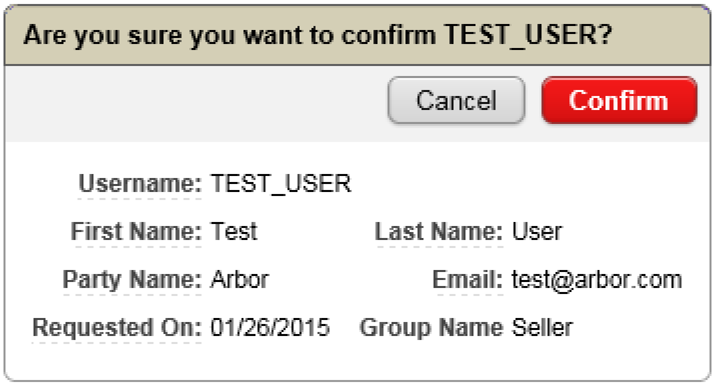
The Admin Menu has two buttons, Pending Users and User Management.



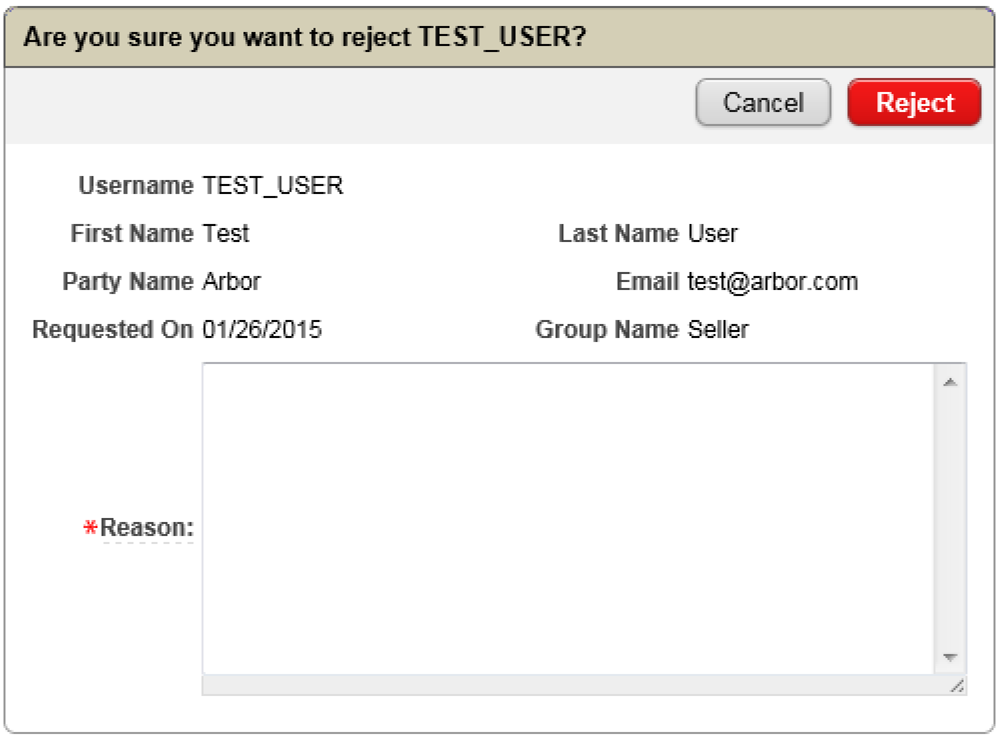

The Pending Users button will open the pending users screen. From this screen, Admins can confirm or reject pending users.



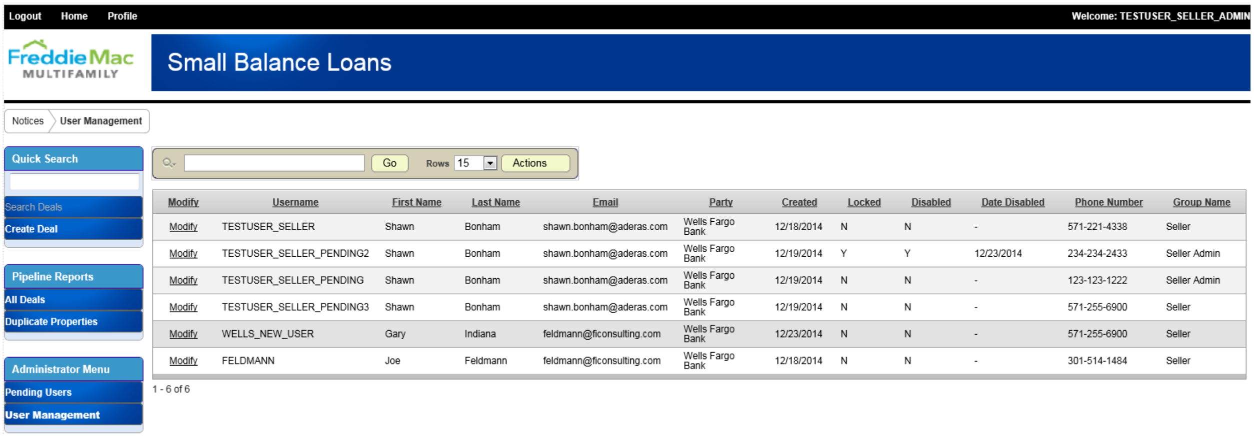

The Confirm link will display a confirmation message. Upon clicking the Confirm button, the user will be granted access.



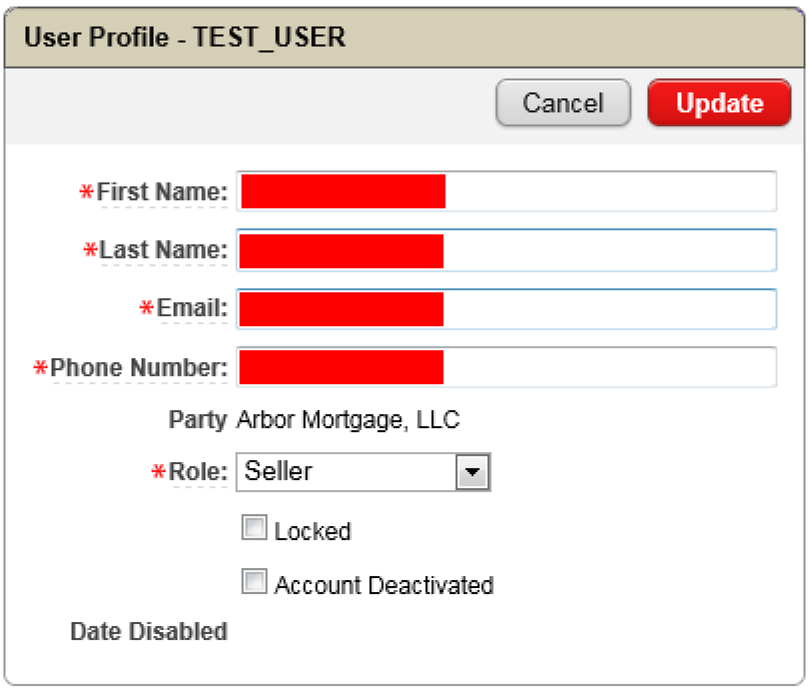

The Reject link will display a confirmation message requiring a reason for rejecting the user access. Upon clicking reject, the pending user will not be granted access and will be removed from the Pending Users list.




The User Management button will open the user management screen displaying all users.




Each user has a modify link. The modify link will open the user profile for the selected user.




Admins can update the user's name, email, phone number, and role. Admins can also lock and deactivate users from this screen. The Update button will save the changes and return the admin to the User Management screen. The Cancel button will discard all changes and return the admin to the User Management screen.

## 7.8 Search Functionality

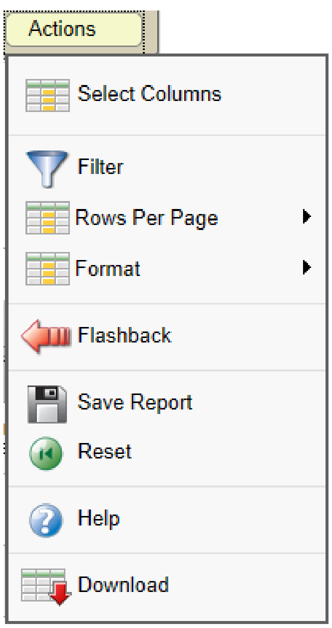
The Search capability in SBL PM allows users to easily aggregate, filter and find data. Users may enter any number, text or date in the Search field and click 'Go' to see the records containing their search criteria.


Once a search filter is applied, the criteria appear below the Action Bar. To lift the criteria, users can uncheck the green check box. This will allow users to apply the criteria at a later point. To remove the filter entirely, users can click the red x filter button.

Internal Stuff goes here

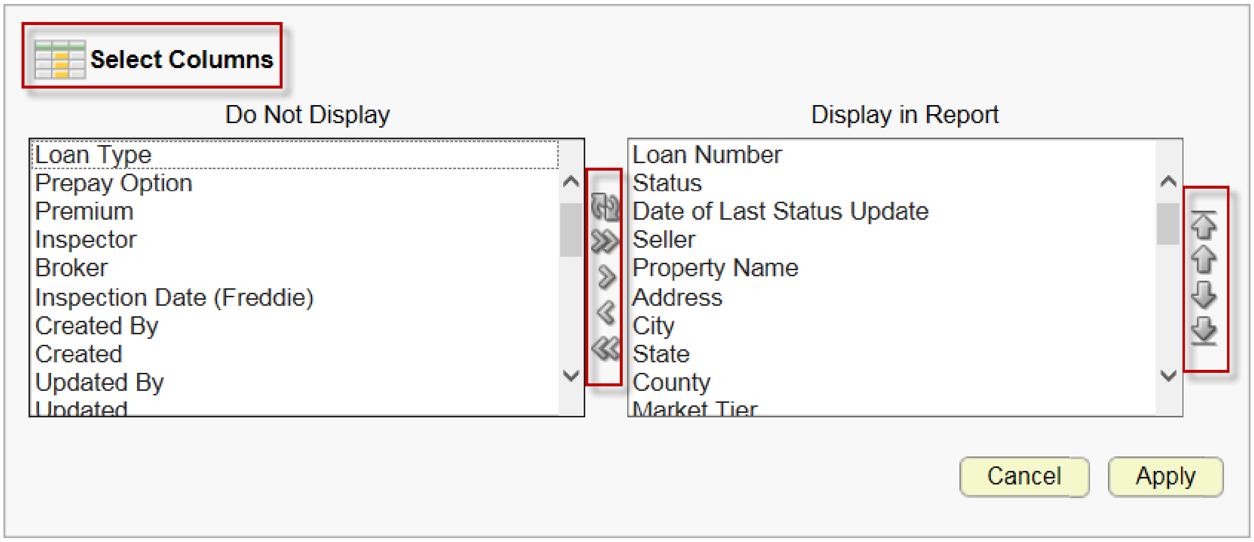
### 7.9 Actions Button Functionality

Users can click on the 'Actions' button to display a menu of possible actions. **Make sure to use the 'Save Report' action after each report change and prior to moving to a different report. If you move to a different report without saving the report, all changes will be lost. There will not be any warning message.**




#### 7.9.1 Select Columns

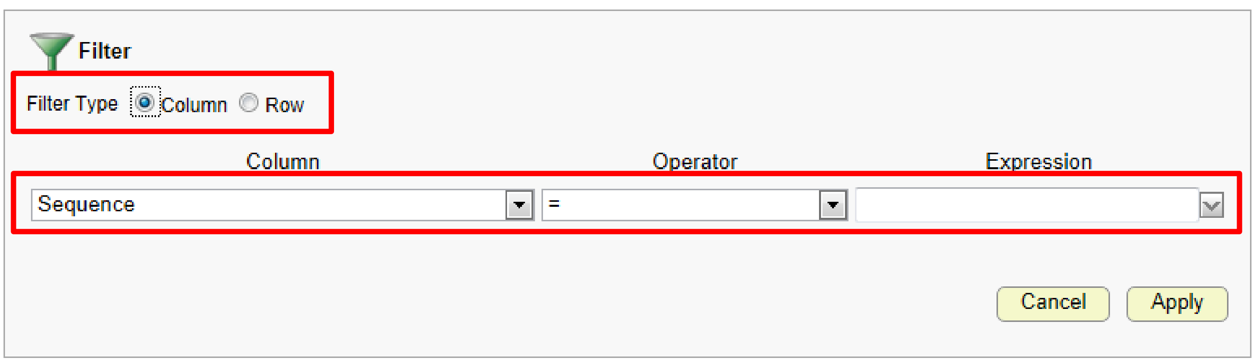
Users will see two boxes, one representing columns that are not displayed on the left, the other representing the columns and order of the data that is displayed in the report on the right. Users can use the buttons in between the boxes to control what data displays on their screen. The double arrow moves all items from one box to the other. A single arrow moves only selected items to the other box. To select multiple items, press-and-hold the Ctrl key. The arrows to the right move the order of columns. The arrow with a line above or below moves a selected item to the top or bottom of the list on the right. The arrow without a line moves the selected column up or down by one space. Users can select and arrange data to their preference using this function. Clicking ‘Apply’, will implement the changes. ‘Cancel’ will discard changes to the display.



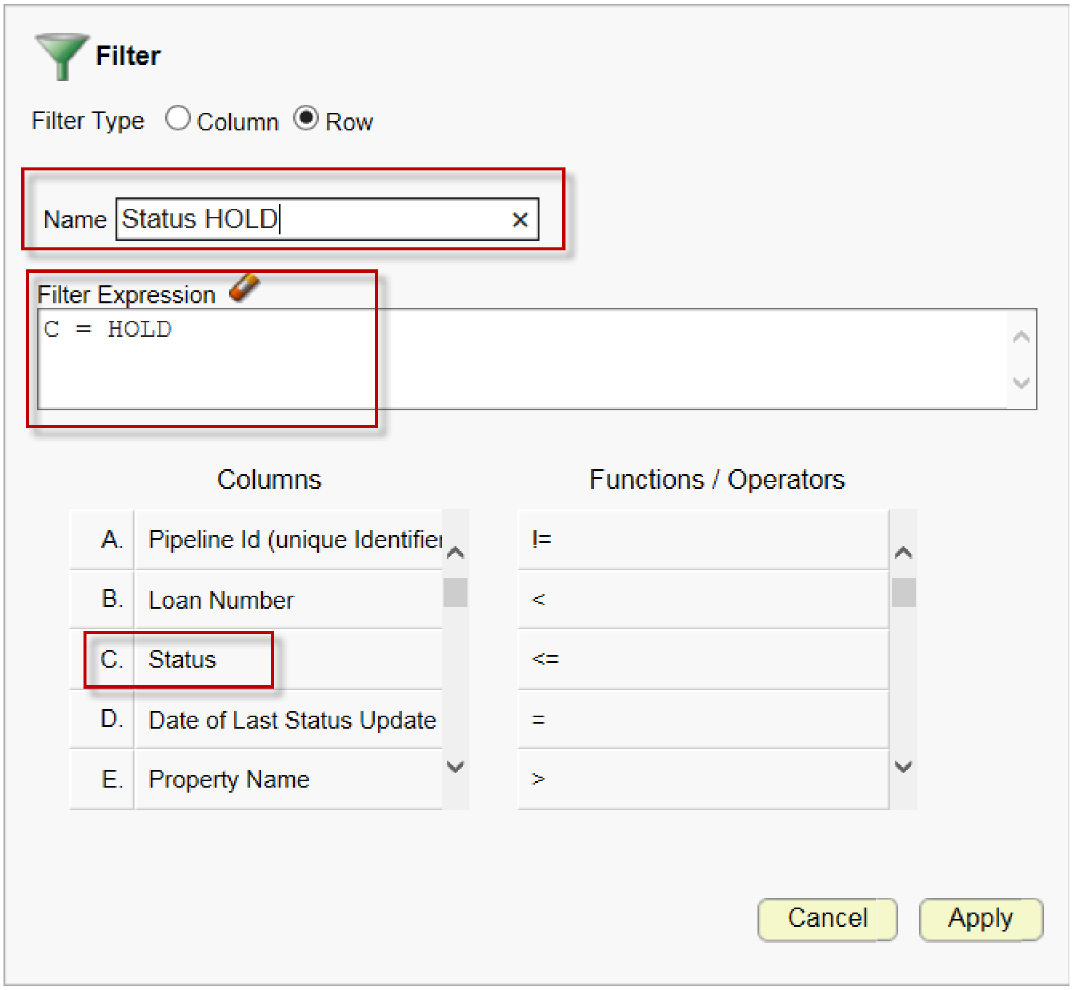

### 7.9.2 Filter

The filter function allows users to filter the data displayed. Users may opt to filter information by either Column or by Row.

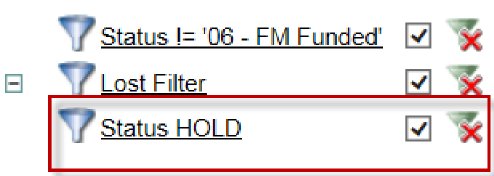
Filter by column: provides a dropdown of all columns available to filter data on. The Operator allows the user to select the correct filter function. The Expression populates with relevant data depending on which column the user has selected to filter. Users can choose ‘Apply’ to implement changes, or ‘Cancel’ to discard any changes.



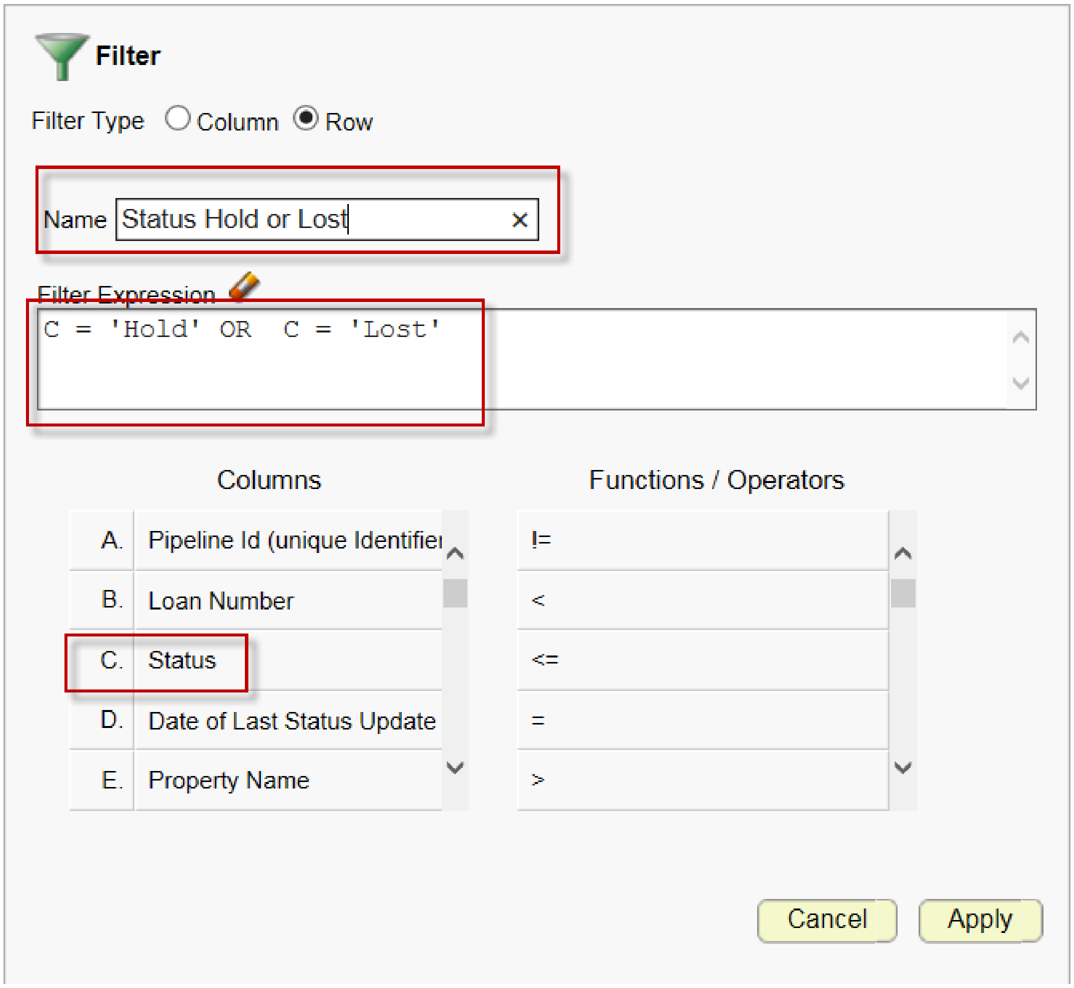

Filter by Row: users can enter the name of their filter. This name will display on the screen after the filter is applied. Users can click on items in the ‘Columns’ box and operators in the ‘Functions / Operators’ box to build a filter expression. The Eraser button next to ‘Filter Expression’ will erase the expression. ‘Apply’ will implement the change, ‘Cancel’ will discard changes.




Once a filter is applied, it will display on the screen with the name the user entered.



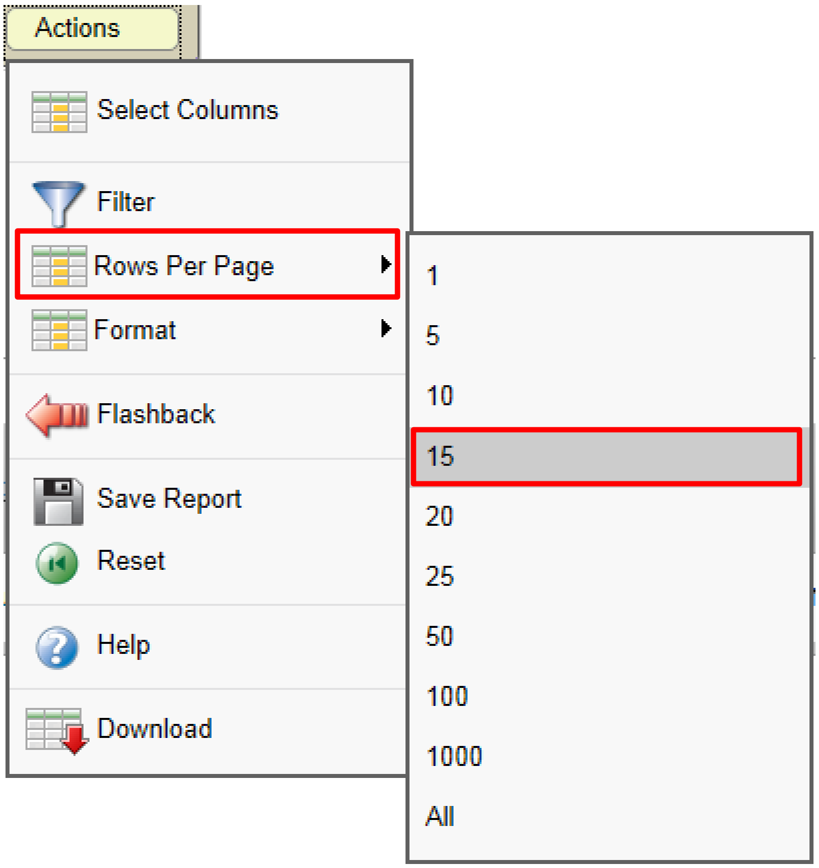

Multiple filters may be applied to a report, but they must be created one at a time. When filters are created, care must be taken to ensure that the filters don't overly restrict the viewable data. For example, if you want to filter a report by a value in a drop-down box, for example Request Type, you can create a column filter and select the value you want to filter by. However, if you want to display more than one value, you can create a second filter and apply them both to the report. To avoid "over filtering" the report, the user can utilize the Row Filter and manually type an expression in the Filter Expression text box of the Row Filter Type. As shown in the below screen shot, you can use the OR operator in the expression to filter on multiple values. In the expression below, C is the column for Status. The values in quotes are the desired filters. The values must be spelled exactly as displayed in the Request Type column of the report. You could also use the LIKE operator if you are unsure of the exact spelling, however, this may also return unwanted records.




Users can lift the filter by un-checking the check box. This removes the filter from the data, but leaves the filter displayed for the user to apply at a later point. Users can delete the filter entirely by clicking the red x over the filter. Once deleted, users would have to rebuild the filter to use it again.

### 7.9.3 Rows Per Page

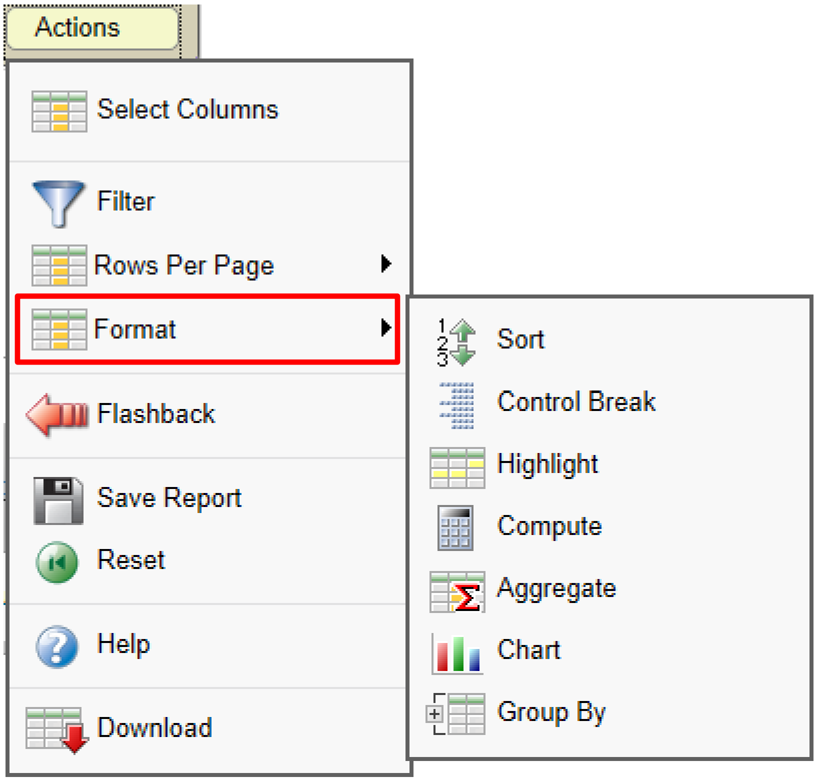
Rows per page allows the user to determine the number of rows to display on a page. Users can select the desired number of rows to display. Remember however, that displaying a large number of records may impact the performance of the web page. When the report is saved as explained below, the setting for Rows Per Page will be saved as well.




Rows can also be altered using the dropdown in the tool bar:

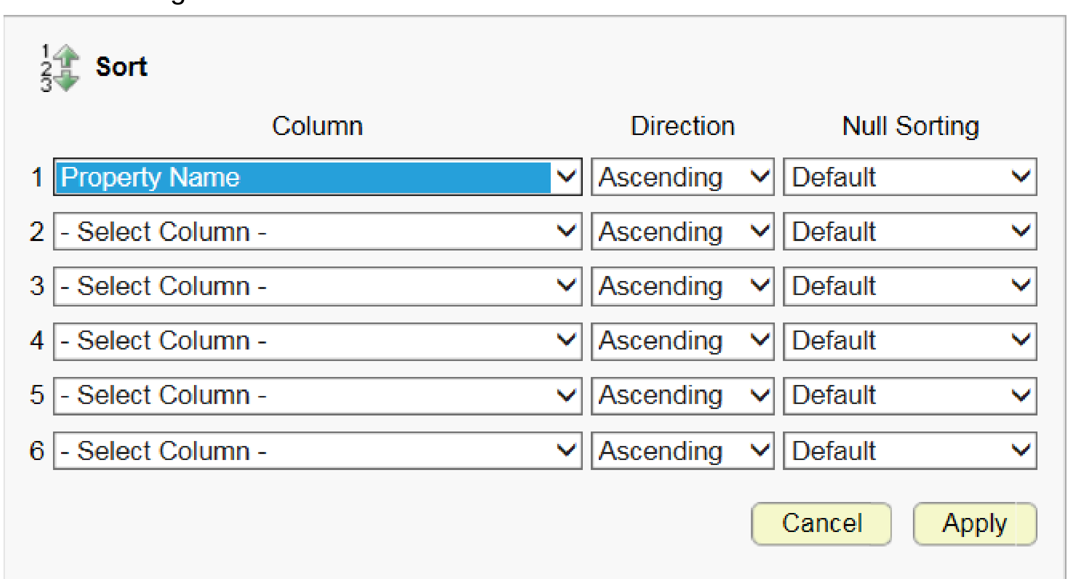
### 7.9.4 Format

Users can select from a menu of Format options.



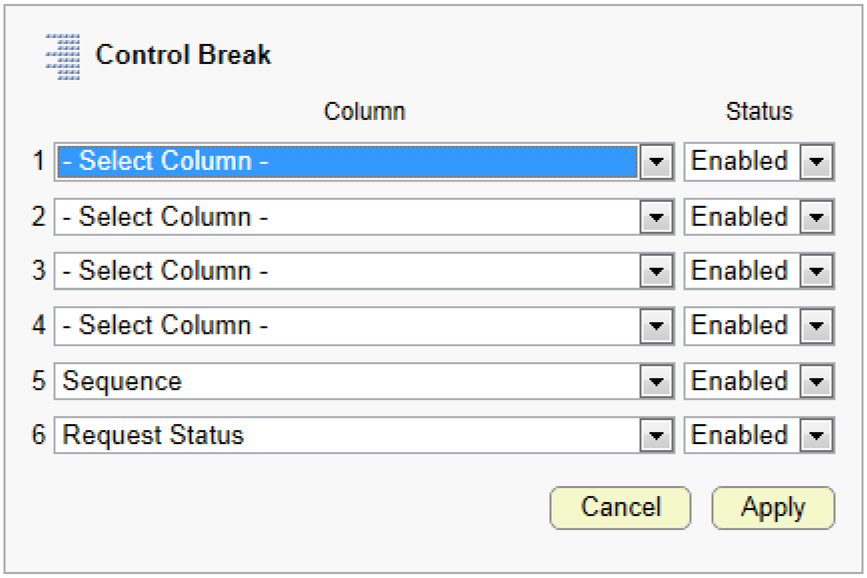

### 7.9.5 Sort

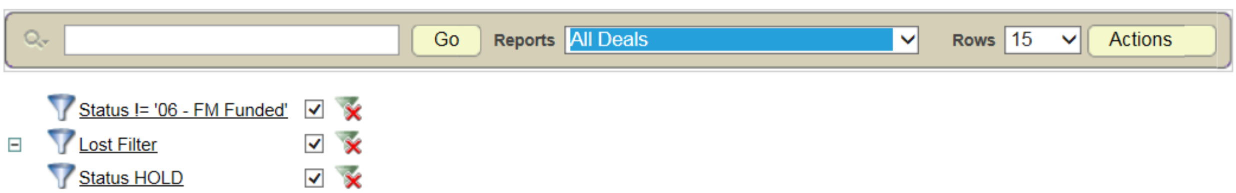
Sort provides up to six columns from which users can sort data for display. Users can designate a direction for each column. Clicking 'Apply' will implement the changes, clicking 'Cancel' will discard changes.



### 7.9.6 Control Break

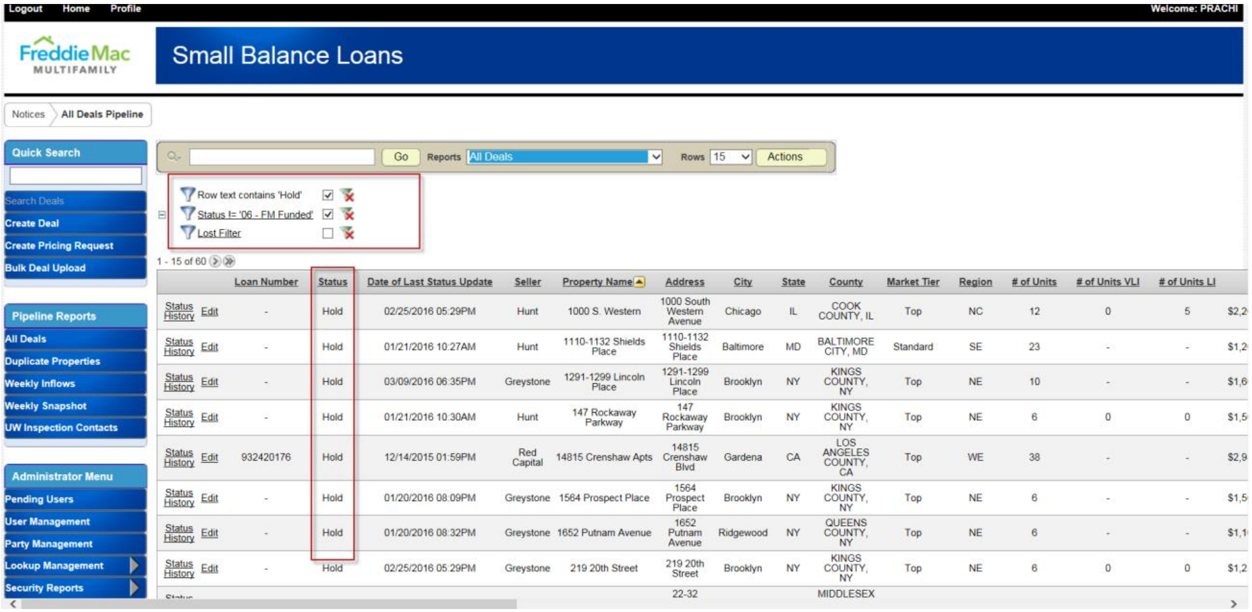
Control break will provide users up to 6 columns to implement breaks in the data set. A user can apply a control break, which will appear on the home page below the Tool Bar.




Users can lift the control break buy unselecting the green check mark. This will lift the break from the data, but allow the user to re-apply it if they wish. Users can completely remove the control break by clicking the red x mark.

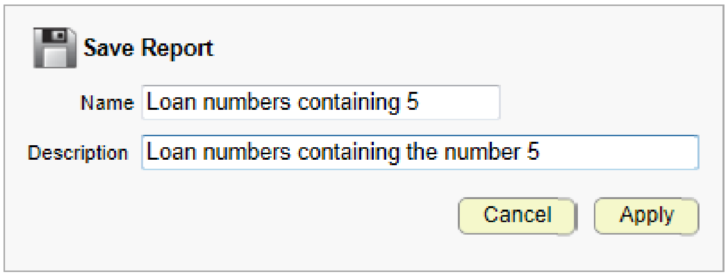
Control breaks separate the data by control break category.



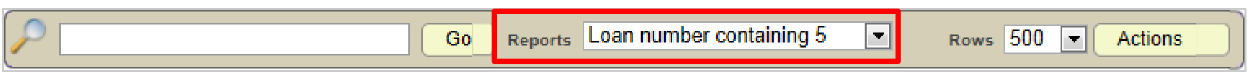
### 7.9.7 Save Report

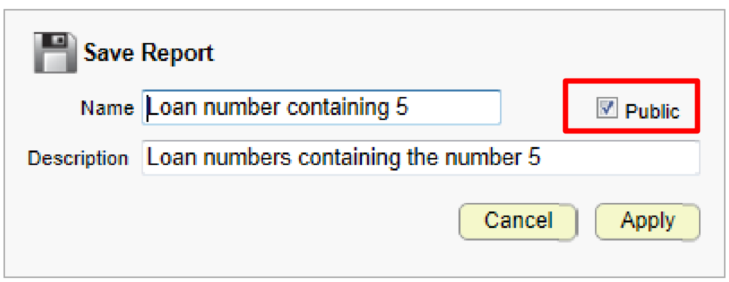
Make sure to use the 'Save Report' action after each report change and prior to moving to a different report. If you move to a different report before saving, all changes will be lost. There will not be any warning message.

Users can use all of the tools and functions described to compile data as they desire. Users can then save these parameters to use the next time they log into SBL PM. Save Report allows users to save these parameters and provide a report name and description. This report will be available every time the user logs into SBL PM. Clicking on 'Apply' will save the report under the specified name, clicking on 'Cancel' will discard the action.

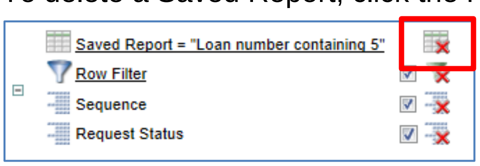



Once a report is saved, it will be available in the Reports drop down selection.



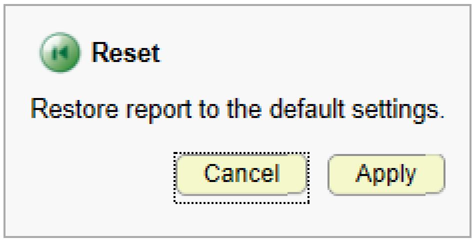




To delete a Saved Report, click the Red X next to the name of the report as shown below.



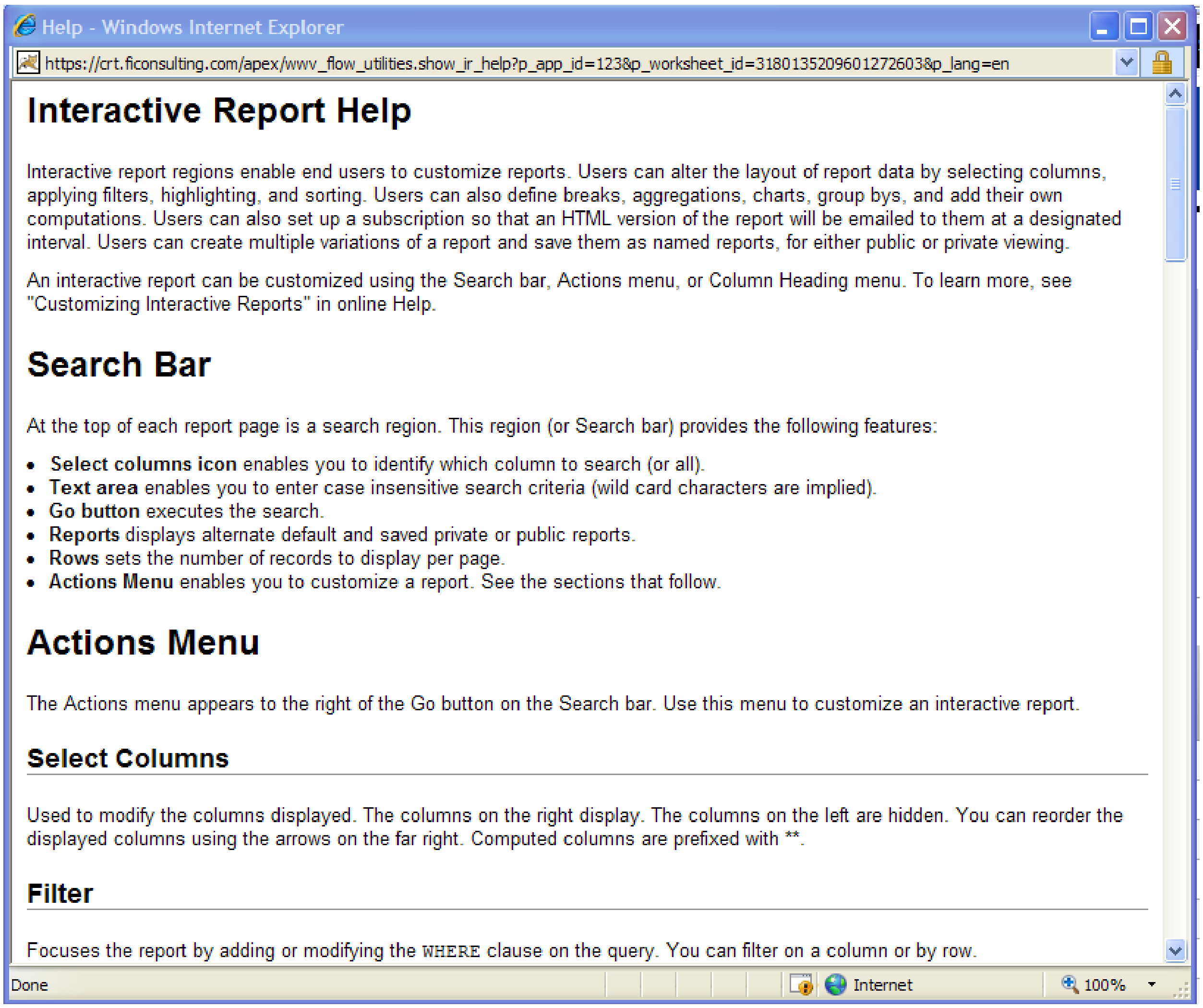

### 7.9.8 Reset

Reset allows a user to revert back to the last time the report was saved. Clicking 'Apply' will revert to default settings, clicking 'Cancel' will not revert to default settings.




### 7.9.9 Help

Help provides a pop-up window with helpful tips on creating a report (performing actions) on the data.




# Interactive Report Help

Interactive report regions enable end users to customize reports. Users can alter the layout of report data by selecting columns, applying filters, highlighting, and sorting. Users can also define breaks, aggregations, charts, group bys, and add their own computations. Users can also set up a subscription so that an HTML version of the report will be emailed to them at a designated interval. Users can create multiple variations of a report and save them as named reports, for either public or private viewing.

An interactive report can be customized using the Search bar, Actions menu, or Column Heading menu. To learn more, see "Customizing Interactive Reports" in online Help.

## Search Bar

At the top of each report page is a search region. This region (or Search bar) provides the following features:

- **Select columns icon** enables you to identify which column to search (or all).
- **Text area** enables you to enter case insensitive search criteria (wild card characters are implied).
- **Go button** executes the search.
- **Reports** displays alternate default and saved private or public reports.
- **Rows** sets the number of records to display per page.
- **Actions Menu** enables you to customize a report. See the sections that follow.

## Actions Menu

The Actions menu appears to the right of the Go button on the Search bar. Use this menu to customize an interactive report.

### Select Columns

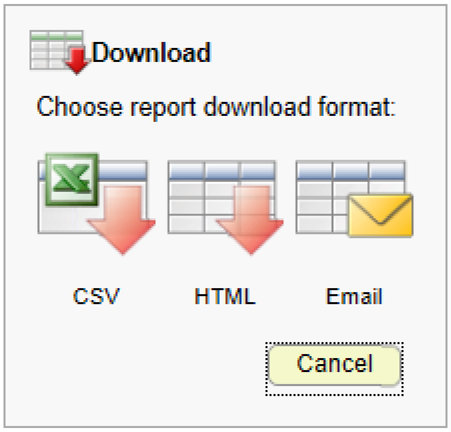
Used to modify the columns displayed. The columns on the right display. The columns on the left are hidden. You can reorder the displayed columns using the arrows on the far right. Computed columns are prefixed with **.

### Filter

Focuses the report by adding or modifying the `WHERE` clause on the query. You can filter on a column or by row.

### 7.9.10 Download

Download allows users to download the data into .csv, .html, or email.




Selecting CSV or HTML will provide a pop-up file download box providing users the option to open, save or cancel.

Selecting 'Email' will provide users the option to enter one or multiple email addresses. Users can edit the prepopulated subject line.

An email will be sent with an attached .htm file containing the data.