

SBL PMT Job Aid

Version 8.4

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1 Overview

The purpose of this document is to provide an overview of the SBL Pipeline Manager Tool (SBL PMT) 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 PMT” or “the tool.”

2 Background

SBL PMT 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 tool 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 PMT 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 PMT 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 PMT. The minimum browser version outside of IE is unknown (eg.: Chrome, Firefox).

5 SBL PMT Support

Servicer user support for SBL PMT:

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

6 Accessing SBL PM

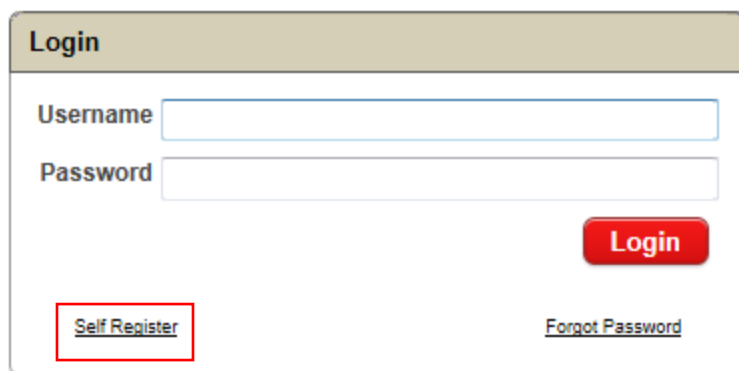
This section describes how to access SBL PMT.

6.1 Website URL

Users can access the application via the following URL: <https://sbl.fm-apps.com>. If the application fails to load, ensure the URL is using the https protocol.

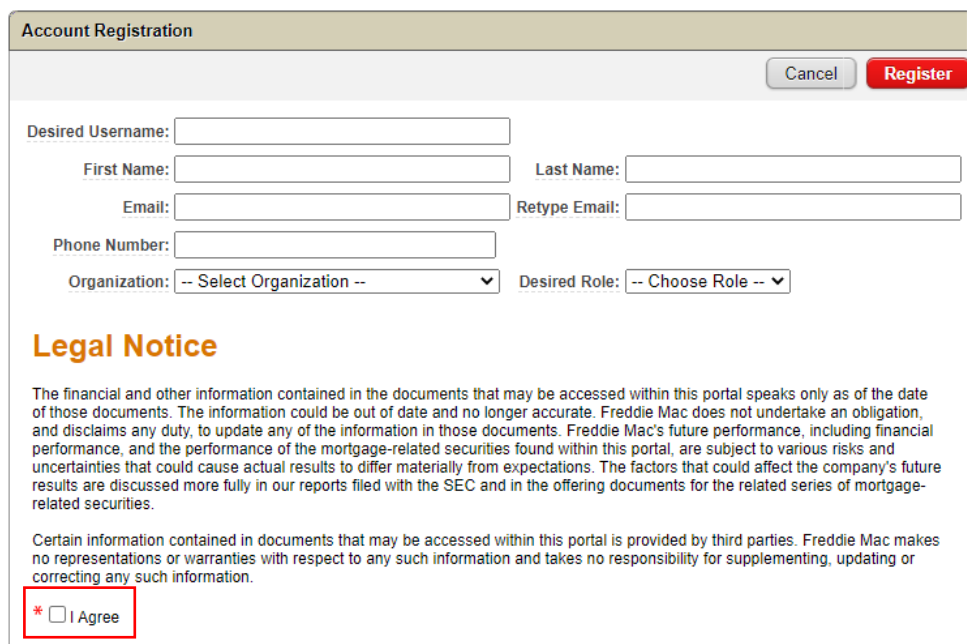
6.2 Initial Registration and Login

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



The screenshot shows a 'Login' form with a title bar. It contains two input fields: 'Username' and 'Password'. Below the 'Password' field is a red 'Login' button. At the bottom left, there is a 'Self Register' link enclosed in a red rectangular box. At the bottom right, there is a 'Forgot Password' link.

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.



The screenshot shows an 'Account Registration' form with a title bar. In the top right corner, there are 'Cancel' and 'Register' buttons. The form contains several input fields: 'Desired Username:', 'First Name:', 'Last Name:', 'Email:', 'Retype Email:', 'Phone Number:', 'Organization:' (a dropdown menu showing '-- Select Organization --'), and 'Desired Role:' (a dropdown menu showing '-- Choose Role --'). Below these fields is a section titled 'Legal Notice' in orange. The notice contains two paragraphs of text. At the bottom of the form, there is a red rectangular box containing the text '* ☐ 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 with a temporary password. Once user has logged in with the temporary password, the user will be instructed to update their password to one that follows SBL PMT's security rules:



Small Balance Loans

SBL Request Granted

Your account request with SBL has been confirmed. Please visit [Small Balance Loans](#)

Your temp password: DbWb5IsK1\$

6.3 Forgotten Passwords

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

A screenshot of the SBL PMT Login page. The page has a light beige header with the word 'Login' in bold. Below the header, there are two input fields: 'Username' and 'Password'. To the right of the 'Password' field is a red 'Login' button. At the bottom left, there is a link 'Self Register'. At the bottom right, there is a link 'Forgot Password' which is highlighted with a red rectangular border.

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.

Password Reset

*User Name:

*New Password:

*Retype New Password:

Having trouble resetting your password? Please send an email to Multifamily_Security@freddiemac.com.

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 must differ from the last 10 previously used passwords.
- Password cannot contain your First Name.
- Password cannot contain your Last Name.

Cancel

Submit

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

Additional PMT 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.

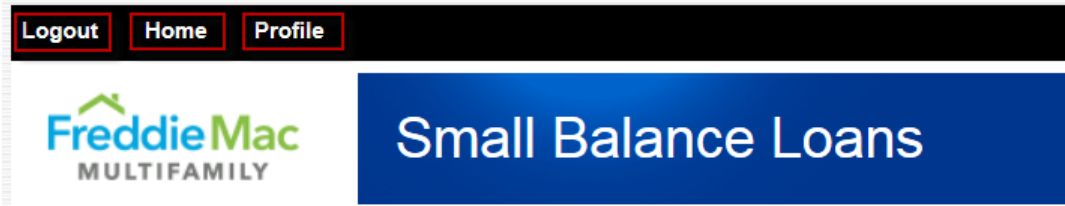
7 Application Navigation

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

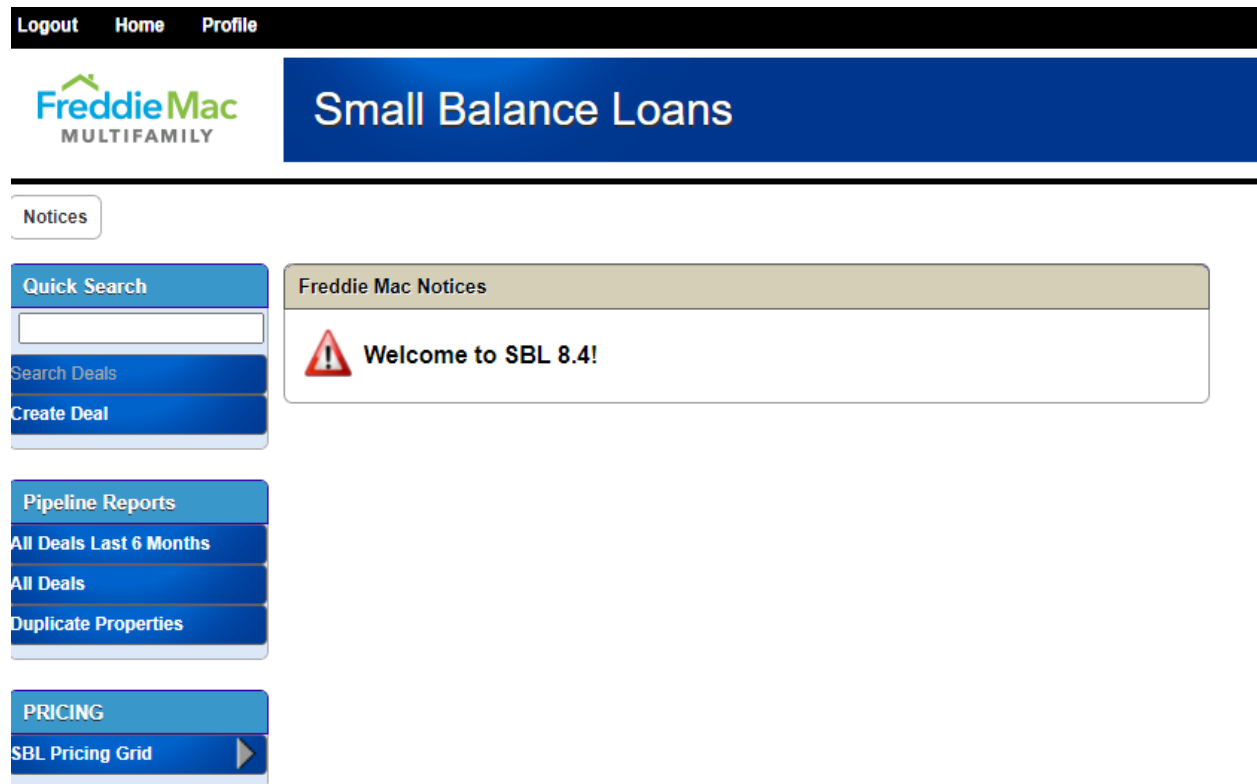
The top menu contains the Logout, Home, and Profile options. These buttons are available from any web page in the Tool.



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 7.8 for more details.

User Profile

Cancel

Update

*First Name:

*Last Name:

*Email:

*Phone Number:

Party Freddie Mac

Current Password

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 must differ from the last 10 previously used passwords.
- Password cannot contain a Dictionary word.
- Password cannot contain your First Name.
- Password cannot contain your Last Name.

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.

Quick Search

Search Deals

Create Deal

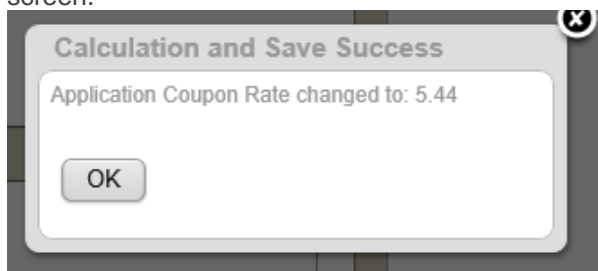
Clicking Search Deals will search all columns in the default pipeline view for the word in the search box.

Create/Edit Deal

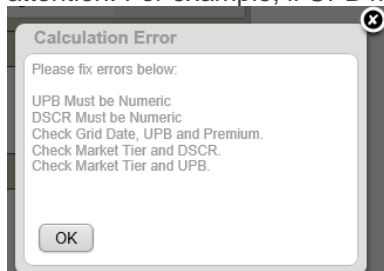
The screenshot shows the 'Create/Edit Deal' form with the 'Pricing Calculator' tab selected. The form has a top navigation bar with tabs: Property Detail, Loan Terms, Key Dates, Deal Contacts, Lender Fee Cert, Contract Underwriting, Inspection, and Notes. Below this is a sub-navigation bar with 'Pricing Calculator' (highlighted) and 'Exception/Prescreen'. The main form area is titled 'Pricing Calculator' and contains the following sections:

- Date Priced:** A text field.
- *Pricing Grid Date:** A dropdown menu with the text '-- Choose Pricing Grid Date --'.
- Loan** section:
 - Refi of Freddie Mac Loan:** A dropdown menu.
 - Sellers Portion of Premium/Buy-Up:** A text field followed by a '%' sign.
 - Seller requested Discount (bps):** A text field followed by a red label 'Discount Changed:'.
 - Approved Discount:** A text field.
 - Approved Seller Discount by FM:** A text field.
 - Approver Name:** A text field.
- Fees Paid by Borrower (Enter all fees in percentage of the total loan amount)** section:
 - App Fee (Less 3rd Party Costs):** A text field followed by a '%' sign.
 - Origination Fee:** A text field followed by a '%' sign.
 - Other Seller Premium Not in Buy-up:** A text field followed by a '%' sign.

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 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:

The screenshot shows a software interface with a top navigation bar containing tabs: Property Detail, Loan Terms, Key Dates, Deal Contacts, Lender Fee Cert, Contract Underwriting, Inspection, and Notes. Below this is a sub-navigation bar with 'Pricing Calculator' (highlighted in red) and 'Exception/Prescreen'. At the bottom, there is a row of buttons: 'Pricing Calculator', 'Calculate and Save', and 'Print View'. In the top right corner of the interface, there are 'Cancel' and 'Apply Changes' buttons.

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

Property Detail
Loan Terms
Key Dates
Deal Contacts
Lender Fee Cert
Contract Underwriting
Inspection
Notes

Pricing Calculator
Exception/Prescreen

Pricing Calculator
Calculate and Save
Print View

Date Priced:

*Pricing Grid Date:

Loan

Refi of Freddie Mac Loan:

Sellers Portion of Premium/Buy-Up: %

Seller requested Discount (bps): Discount Changed:

Approved Discount:

Approved Seller Discount by FM:

Approver Name:

Fees Paid by Borrower (Enter all fees in percentage of the total loan amount)

App Fee (Less 3rd Party Costs): %

Origination Fee: %

Other Seller Premium Not in Buy-up: %

Pricing Calculation

Base Coupon: %

Prepay Adjustment: %

DCR Adjustment: %

LTV Adjustment: %

I/O Adjustment: %

Premium Adjustment: %

Delivery Timing Adjustment: %

Regulatory Agreement Adjustment: %

Mission (=50% of units) Adjustment: %

Qualified <=60% of AMI (>=30% of units) Adjustment: %

< \$1 Million Adjustment: %

Link Loans Adjustment: %

Approval Date:

Approved Pricing Adjustment:

Approved Market Tier Adj: No

Servicing: %


Mortgage Coupon: %

Loan Submission Template (LST) & OUS Entries	
Buy-Up (Fees Out) in Percentage:	1.250 %
Index Rate (%):	0.50 %
Net Spread to Freddie Mac:	2.99 %
Underwritten Note Rate:	3.94 %
Minimum Premium Buy-Up Check: Minimum Not Met	

Premium in Servicing Spreads	
% of Premium to Seller:	1.2500 %
Total Cash from Premium:	\$.56
Seller Comp in Cash from Premium:	\$.56

Print View Button:

Clicking on the Print View button will open SBL Pricing Calculator in a print view screen as shown below. On the print view screen, clicking on the Output PDF button to export data to PDF file.



SBL Pricing Calculator

FM Loan Number:

Property Name:

Property State:

Property County:

Property MSA:

Date Priced:

Pricing Grid Date:

Date Under App:

Delivered to FRE:

Business Days UA:

Loan	
UPB	\$2,500,000
Market Tier	Standard
Acquisition/Refinance ¹	Refinance
Refi of Freddie Mac Loan	
Loan Type	Fixed - 10 YR
Total Premium/Buy-Up	0.750%
Seller's Portion of Premium/Buy-Up	0.750%
Prepayment Option	YM
DCR	1.35
LTV	62.00%
IO Term →	2 YR
Delivery Timing (20 Days = Standard Delivery)	
Regulatory Agreement	No
Is Qualified Mission	Yes
Qualified Mission	50
Qualified ≤60% of AMI(≥30% of Units)	No
< \$1 Million	No
Link Loans	No
Market Tier Adjustment	
Fees Paid by Borrower	
	Percentage of UPB(%)
App Fee (Less 3rd Party Costs)*	%
Origination Fee*	%
Other Seller Premium Not in Buy-Up*	%
Pricing Calculation	
Base Coupon	3.28%
Prepay Adjustment	-0.20%
DCR Adjustment	-0.06%
LTV Adjustment	-0.08%
IO Adjustment	-0.04%
Premium Adjustment	0.12%
Delivery Timing Adjustment	0.00%
Regulatory Agreement Adjustment	0.00%
Mission (≥50% of units) Adjustment	-0.15%
Qualified ≤60% of AMI(≥30% of Units) Adjustment	0.00%
< \$1 Million Adjustment	0.00%
Link Loans Adjustment	0.00%
Approval Date	
Approved Pricing Adjustment	%
Approved Market Tier Adjustment	No
Mortgage Coupon ²	3.34%
Loan Submission Template (LST) & OUS Entries	
Buy-Up (Fees Out) in Percentage	0.75%
Index Rate(%) ³	0.90%
Net Spread to Freddie Mac ⁴	1.97%
Servicing Fee (bps)	47
Underwritten Note Rate	3.34%
Premium in Servicing Spreads	
% of Premium to Seller	0.75%
Total Cash from Premium	\$18,750
Seller Comp in Cash from Premium	\$18,750

Freddie Mac - Internal Use Only:

Delivery Type:

Standard delivery (Full Underwriting)

***Enter all fees in a percentage of total loan amount**

Minimum Premium Buy-Up Check

Minimum Not Met

Notes:

1 For a Freddie Mac refinance, please contact your SBL Regional Manager

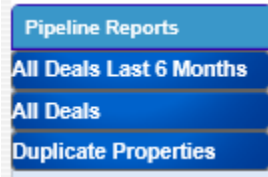
2 Final mortgage coupon adjusted for premium/buyups

3 Coupon per pricing grid but including add-ons for premium/buyups and servicing

4 Indicative spread based on final coupon less servicing and index

7.6 Pipeline Reports

The Pipeline Reports menu has three buttons, All Deals Last 6 Months, All Deals and Duplicate Properties.



The All Deals Last 6 Months and All Deals button will load the Pipeline Screen.

Notices > All Deals Pipeline

Quick Search: Go 1. Primary Report ☐ Rows 15 ☐ Actions ☐

Search Deals
Create Deal

Pipeline Reports
All Deals Last 6 Months
All Deals
Duplicate Properties

PRICING
SBL Pricing Grid

▼ ☒ ☒ Days Created Filter <= 180 ☒ Status != '06 - FM Funded' ☒ Lost Filter

Total number of rows: 60 1 (1 - 15) > >

	Loan Number	Status	Date of Last Status Update	Seller	Property Name	Address	City	State	Zip Code	County	Market Tier	Region	# of Units
Status History Edit	-												
Status History Edit	-												
Status History Edit	-												

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.

Create/Edit Deal

Cancel Create New Deal

Property Detail Loan Terms Key Dates Deal Contacts Lender Fee Cert Contract Underwriting Inspection Notes

Pricing Calculator Exception/Prescreen

Property Detail

Loan Number:

Opportunity Number:

* Status:

Date of Last Status Update:

* Property Name:

* Address:

* City:

* State:

Region:

* Zip Code:

* County:

Market Tier:

Market Tier Adj:

* # of Units:

of Units VLI:

of Units LI:

Mission %:

Link Loans:

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.

Pipeline Reports

All Deals Last 6 Months

All Deals

Duplicate Properties

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.

31. Duplicate Properties
15

Total number of rows: 3198 1 (1 - 15)

Property Name	Count All Rows
119 Pharr Road	3
South East Playground	1
111 S Oxford St	1
Creed Street	1
Hialeah	1
Twin Oaks Apartments - Schaich Portfolio	1
Newark Portfolio - 330 Mount Prospect Ave	1
737 Center Ave	1
1015 & 1017 Howe Ave	1
Cranford Place APartments	1
845 Manhattan Ave	1
1094 Dekalb Ave	1
764 Jefferson Ave	1
669 Halsey Street	1
Design 39	1

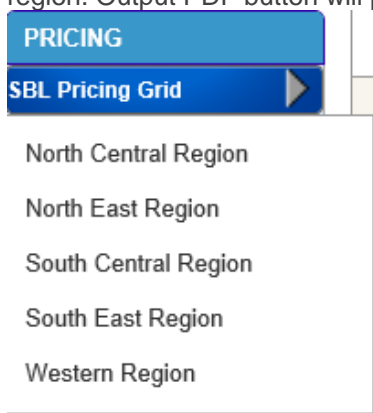
Total number of rows: 3198 1 (1 - 15)

7.7 Pricing Menu

The Pricing Menu has a button called SBL Pricing Grid.

7.7.1 SBL Pricing Grid

The SBL Pricing Grid button has five options, North Central Region, North East Region, South Central Region, South East Region and Western Region. All buttons will open Pricing Grid Data for selected region. Output PDF button will print the SBL Pricing Grid data into pdf file.



Region: 

CONFIDENTIAL

* As of 5/29/2018, note rate excludes primary servicing fee.

Region Pricing Grid - Top/Standard Markets					Effective: 11/17/2020	
Section A - Base Available Loan Structures						
Loan Type	Hybrid	Hybrid	Hybrid	Fixed	Fixed	Fixed
Fixed Term	5	7	10	5	7	10
Floating Term	15	13	10	0	0	0
Balloon/Amortization	20/30	20/30	20/30	5/30	7/30	10/30
Max IO Period (Yrs) ¹	1	2	3	1	2	3
Prepay During Fixed	54321	5544321	5544332211	54321	5544321	5544332211
Prepay During Floating	1%	1%	1%	N/A	N/A	N/A
LTV/DSCR - Top Markets	80/1.20	80/1.20	80/1.20	80/1.20	80/1.20	80/1.20
LTV/DSCR - Standard Markets	80/1.25	80/1.25	80/1.25	80/1.25	80/1.25	80/1.25
Section B - Base Loan Pricing Coupon*						
Fixed Pricing (Standard Markets)	3.10%	3.13%	3.28%	3.10%	3.13%	3.28%
Fixed Pricing (Top Markets)	3.00%	3.13%	3.23%	3.00%	3.13%	3.23%
Section C - Loan Pricing Adjustments						
Qualified Mission Loans						
Standard Markets ≥50% ≥80%	-15 -30	-15 -30	-15 -30	-15 -30	-15 -30	-15 -30
Top Markets ≥50% ≥80%	-15 -30	-15 -30	-15 -30	-15 -30	-15 -30	-15 -30
Qualified ≤60% of AMI(≥30% of Units)	-10	-10	-10	-10	-10	-10
Alternative Prepay Protections						
Alternative 1	YM,1%	YM,1%	YM,1%	YM	YM	YM
Pricing Change	-15	-20	-20	-10	-20	-20
Alternative 2 ²	321(3),1%	3(2),2(2),1(3),1%	3(3),2(3),1(4),1%	321(3)	3(2),2(2),1(3)	3(3),2(3),1(4)
Pricing Change	20	20	15	25	20	15
Alternative 3 ²	310(3),0%	N/A	N/A	310(3)	N/A	N/A
Pricing Change	30			30		
Loan Size ≤\$1M	15	15	15	15	15	15
Regulatory Agreement ³	10	10	10	10	10	10
LTV ≤ 70% ≤ 65% ≤ 55%	-4 -8 -12	-4 -8 -12	-4 -8 -12	-4 -8 -12	-4 -8 -12	-4 -8 -12
DSCR ≥ 1.30 ≥ 1.40 ≥ 1.50	-6 -12 -16	-6 -12 -16	-6 -12 -16	-6 -12 -16	-6 -12 -16	-6 -12 -16
Section D - Excess Premium (Buy-Up or Ongoing Spread)						
BPs Per Point of Premium	25	20	15	25	20	15
Notes						

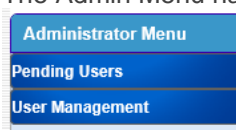
Notes

- UST Index Yields (For Seller LST Submission and Internal Freddie Mac Purposes only. Do not use for quoting.)

All 5-yr	All 7-yr	All 10-yr
50	60	80

7.8 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.

Confirm Request	Reject Request	Username	First Name	Last Name	Email	Party	Date Requested	Group Name
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							
Confirm	Reject							

1 - 15 >

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

Are you sure you want to confirm TEST_USER?

Username: TEST_USER

First Name: Test **Last Name:** User

Party Name: Arbor **Email:** test@arbor.com

Requested On: 01/26/2015 **Group Name:** Seller

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.

Are you sure you want to reject TEST_USER?

Username TEST_USER

First Name Test

Last Name User

Party Name Arbor

Email test@arbor.com

Requested On 01/26/2015

Group Name Seller

***Reason:**

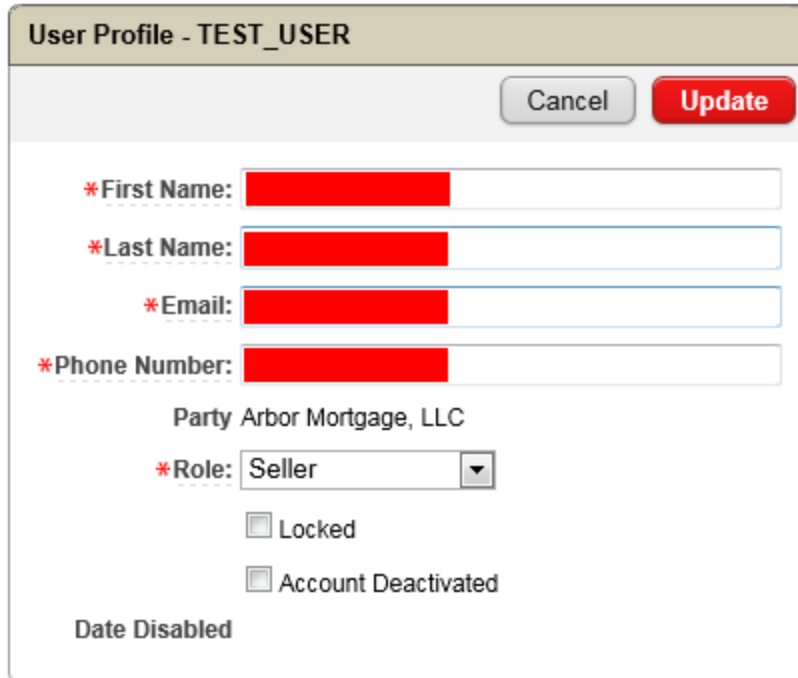
The User Management button will open the user management screen displaying all users.

Q v	Go	Rows	15	Actions v
-----	----	------	----	-----------

Modify	Username	First Name	Last Name	Email	Party	Created	Locked	Disabled	Date Disabled	Phone Number	Group Name
Modify											
Modify											
Modify											
Modify											
Modify											
Modify											
Modify											
Modify											
Modify											
Modify											
Modify											
Modify											
Modify											
Modify											

1 - 15 of 215 >

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



User Profile - TEST_USER

Cancel Update

*First Name:

*Last Name:

*Email:

*Phone Number:

Party Arbor Mortgage, LLC

*Role:

☐ Locked

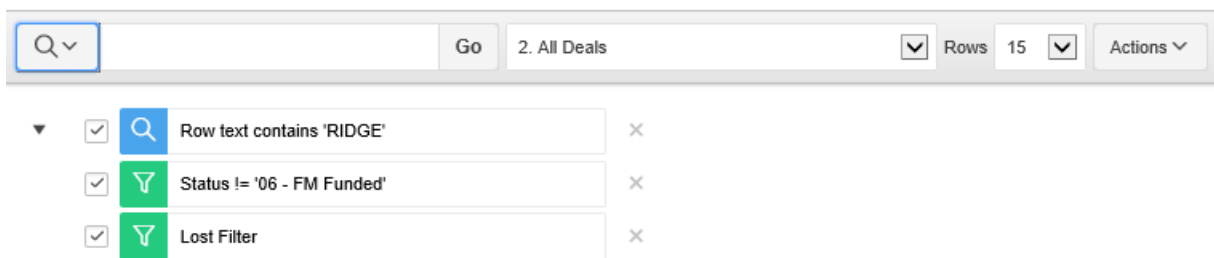
☐ Account Deactivated

Date Disabled

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.

7.9 Search Functionality

The Search capability in SBL PMT 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.



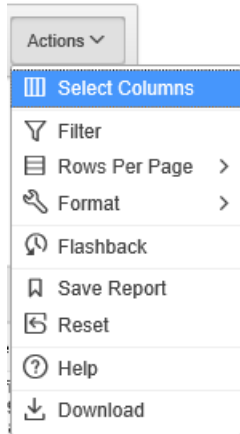
Q Go 2. All Deals Rows 15 Actions

☒ Row text contains 'RIDGE' x
☒ Status != '06 - FM Funded' x
☒ Lost Filter x

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.

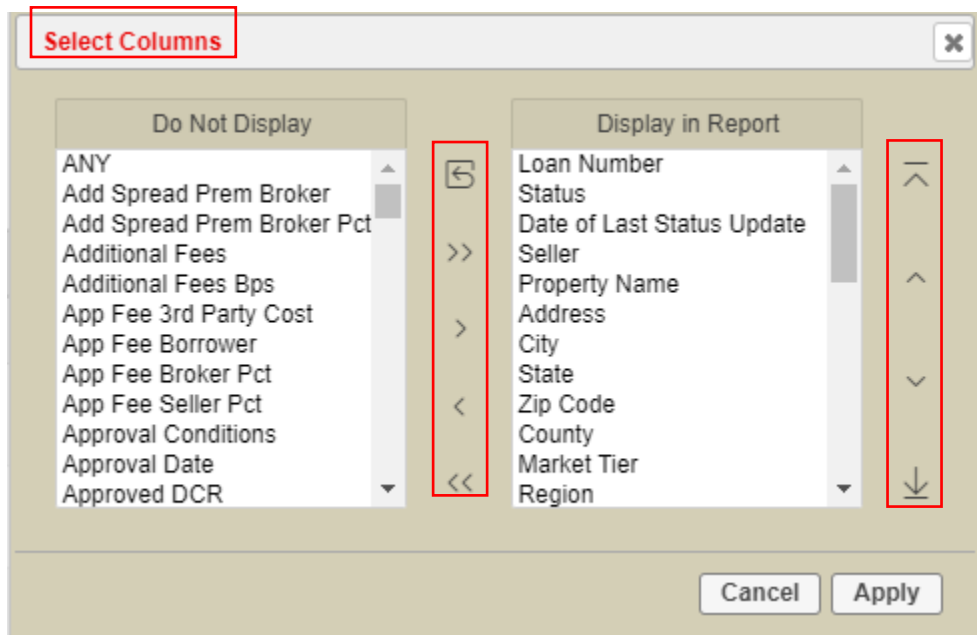
7.10 Actions Button Functionality

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.**



7.10.1 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.



7.10.2 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.

The 'Filter' dialog box is shown with the 'Filter by Row' tab selected. It features a 'Column' list on the left and an 'Expression' field on the right. The 'Column' list contains 'Loan Number'. The 'Expression' field shows an equals sign (=) as the operator. The 'Filter' name field is empty. The 'Cancel' and 'Apply' buttons are at the bottom right.

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.

The 'Filter' dialog box is shown with the 'Filter by Column' tab selected. It features a 'Name' field, a 'Filter Expression' field, and two lists: 'Columns' and 'Functions / Operators'. The 'Name' field is empty. The 'Filter Expression' field is empty. The 'Columns' list contains: A. Pipeline Id (unique Identifier), B. Loan Number, C. Status, D. Date of Last Status Update, E. Property Name, F. Address, G. City, H. State. The 'Functions / Operators' list contains: !=, <, <=, =, >, >=, ABS, ADD MONTH. The 'Cancel' and 'Apply' buttons are at the bottom right.

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

<input checked="" type="checkbox"/>		Row text contains 'RIDGE'	
<input type="checkbox"/>		Status != '06 - FM Funded'	
<input checked="" type="checkbox"/>		Status = 'Hold'	
<input checked="" type="checkbox"/>		Lost Filter	

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.

Filter

Column

Row

Name

Status Hold or Lost

Filter Expression

C = 'Hold' OR C= 'Lost'

Columns

A. Pipeline Id (unique Identifier)
B. Loan Number
C. Status
D. Date of Last Status Update
E. Property Name
F. Address
G. City
H. State

Functions / Operators

!=
<
<=
=
>
>=
ABS
ADD_MONTHS

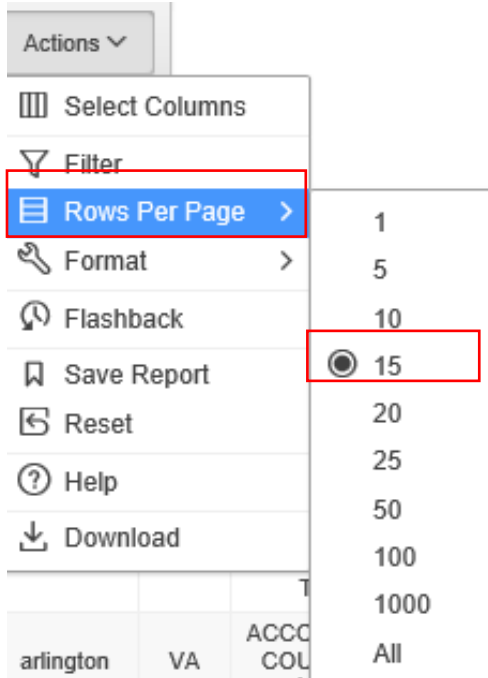
Cancel

Apply

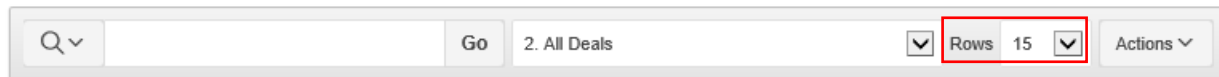
Users can lift the filter by un-checking the check box. This removes the filter from the data, but leaves the filter displayed for the user to apply at a later point. Users can delete the filter entirely by clicking the red x over the filter. Once deleted, users would have to rebuild the filter to use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

7.10.3 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 many 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.

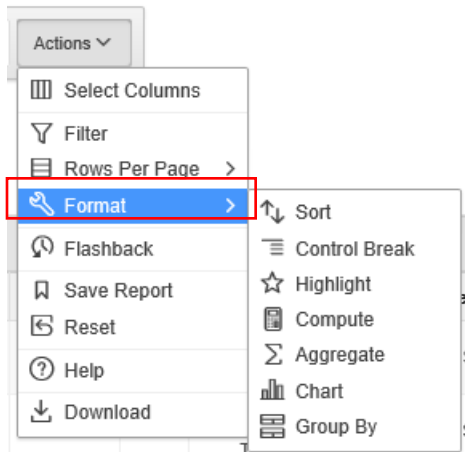


Rows can also be altered using the dropdown in the tool bar:



7.10.4 Format

Users can select from a menu of Format options.



7.10.5 Sort

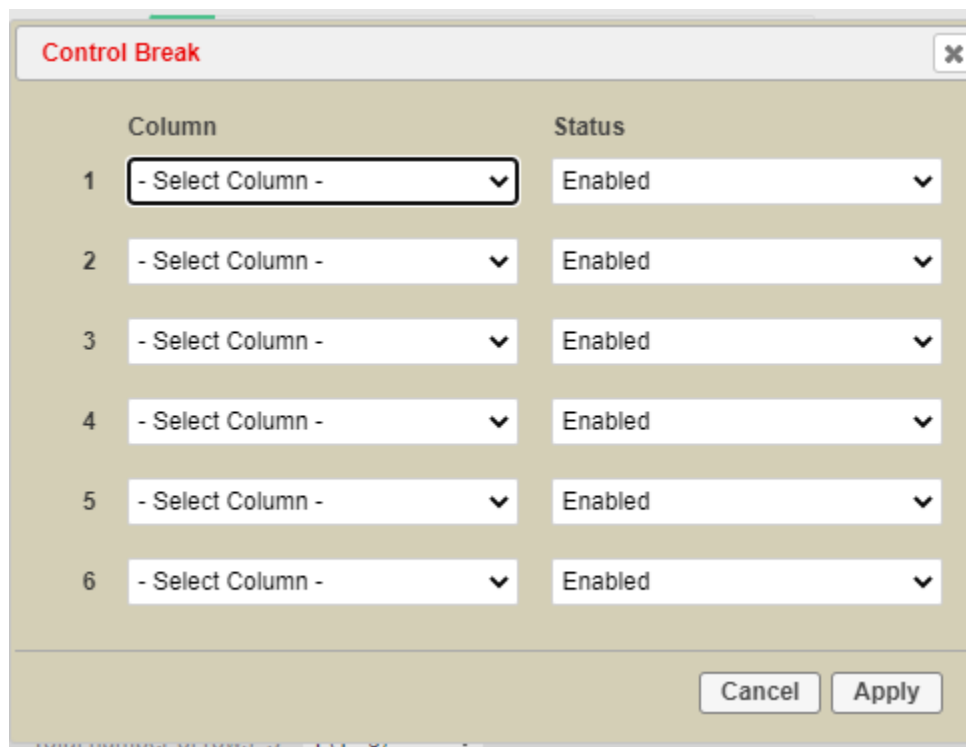
Sort provides up to six columns from which users can sort data for display. Users can designate a direction for each column. Clicking 'Apply' will implement the changes, clicking 'Cancel' will discard changes.

 A screenshot of a 'Sort' dialog box. The dialog has a title bar with the word 'Sort' in red and a close button. It contains a table with three columns: 'Column', 'Direction', and 'Null Sorting'. There are six rows in the table. The first row is pre-filled with 'Date of Last Status' in the 'Column' column, 'Descending' in the 'Direction' column, and 'Default' in the 'Null Sorting' column. The remaining five rows have '- Select Column -' in the 'Column' column, 'Ascending' in the 'Direction' column, and 'Default' in the 'Null Sorting' column. At the bottom right of the dialog, there are two buttons: 'Cancel' and 'Apply'.

	Column	Direction	Null Sorting
1	Date of Last Status	Descending	Default
2	Property Name	Ascending	Default
3	- Select Column -	Ascending	Default
4	- Select Column -	Ascending	Default
5	- Select Column -	Ascending	Default
6	- Select Column -	Ascending	Default

7.10.6 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.



The image shows a 'Control Break' dialog box with a title bar containing the text 'Control Break' and a close button (X). The dialog contains a table with two columns: 'Column' and 'Status'. There are six rows, each with a column number (1-6) and a status dropdown menu. All status dropdowns are currently set to 'Enabled'. At the bottom of the dialog, there are two buttons: 'Cancel' and 'Apply'.

	Column	Status
1	- Select Column -	Enabled
2	- Select Column -	Enabled
3	- Select Column -	Enabled
4	- Select Column -	Enabled
5	- Select Column -	Enabled
6	- Select Column -	Enabled

Cancel Apply

Users can lift the control break by 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.

2. All Deals

Rows

15

☐

Status != '06 - FM Funded'

☒

Status = 'Hold'

☐

Lost Filter

Total number of rows: 7

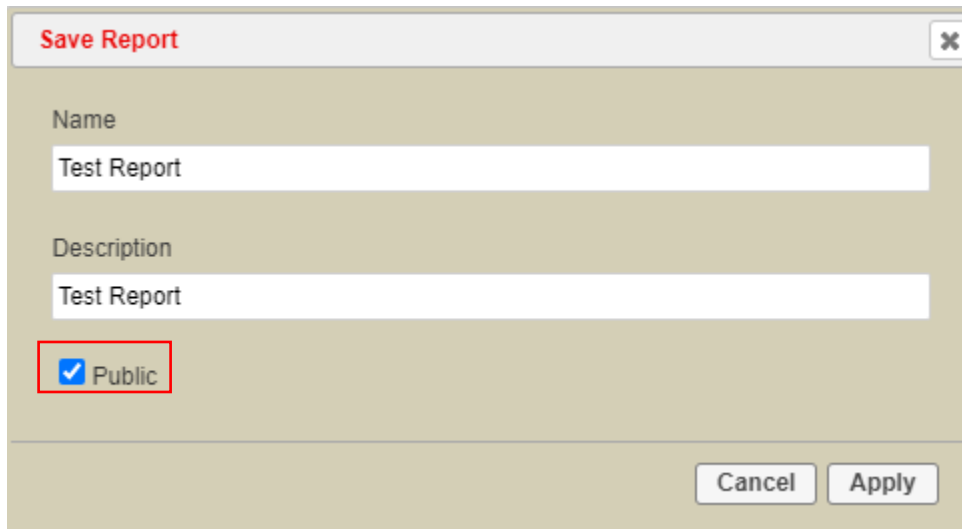
1 (1 - 7)

		Loan Number	Status	Date of Last Status Update ↓	Seller	Property Name	Address	City	State
Status History	Edit	-	Hold	07/23/2020 06:47PM					
Status History	Edit	-	Hold	07/17/2020 03:42PM					
Status History	Edit	-	Hold	07/17/2020 03:41PM					
Status History	Edit	-	Hold	07/15/2020 09:55AM					
Status History	Edit	-	Hold	07/01/2020 08:11PM					
Status History	Edit	-	Hold	06/30/2020 02:14PM					

7.10.7 Save Report

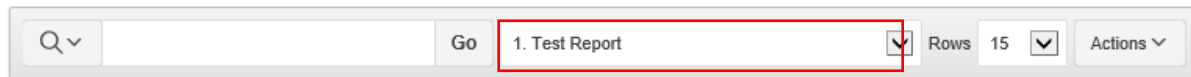
Make sure to use the 'Save Report' action after each report change and prior to moving to a different report. If you move to a different report before saving, all changes will be lost. There will not be any warning message.

Users can use all 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 PMT. 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 PMT. Clicking on 'Apply' will save the report under the specified name, clicking on 'Cancel' will discard the action.



The 'Save Report' dialog box has a title bar with the text 'Save Report' and a close button (X). It contains two text input fields: 'Name' with the value 'Test Report' and 'Description' with the value 'Test Report'. Below these fields is a checkbox labeled 'Public' which is checked. At the bottom right are two buttons: 'Cancel' and 'Apply'.

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



The Reports dropdown menu shows a search bar with a magnifying glass icon and a 'Go' button. The dropdown list contains one item: '1. Test Report', which is highlighted with a red box. To the right of the dropdown are 'Rows' (set to 15) and 'Actions' (with a dropdown arrow).

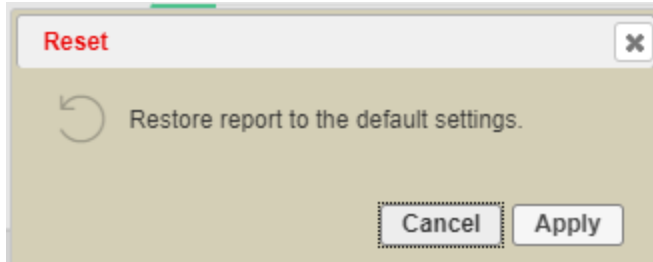
To delete a Saved Report, click the Red X next to the name of the report as shown below.



A list of saved reports is shown. The first item is 'Saved Report = "Test Report"' with a blue bookmark icon and a red box around the delete (X) button. Below it are two other items: 'Status != '06 - FM Funded'' and 'Lost Filter', both with green funnel icons and delete (X) buttons.

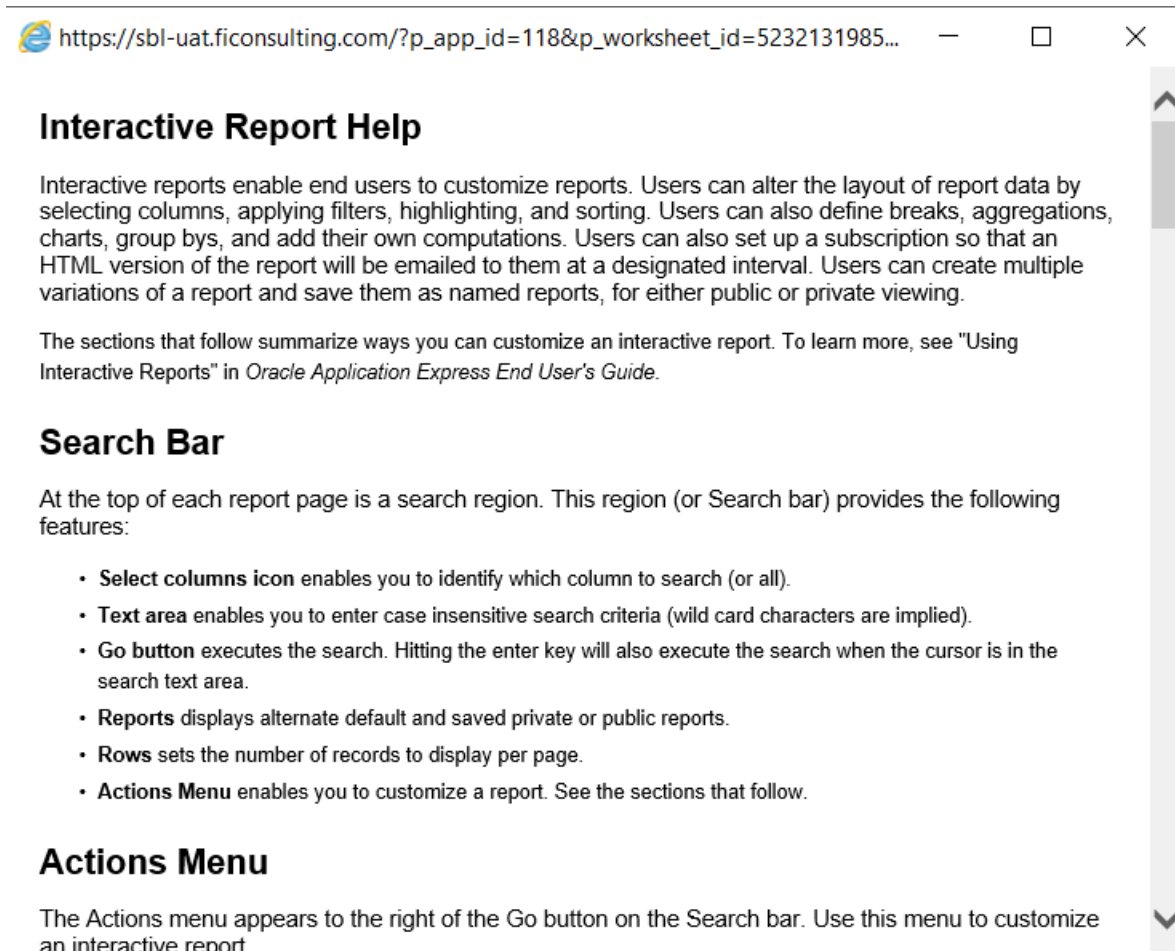
7.10.8 Reset

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.



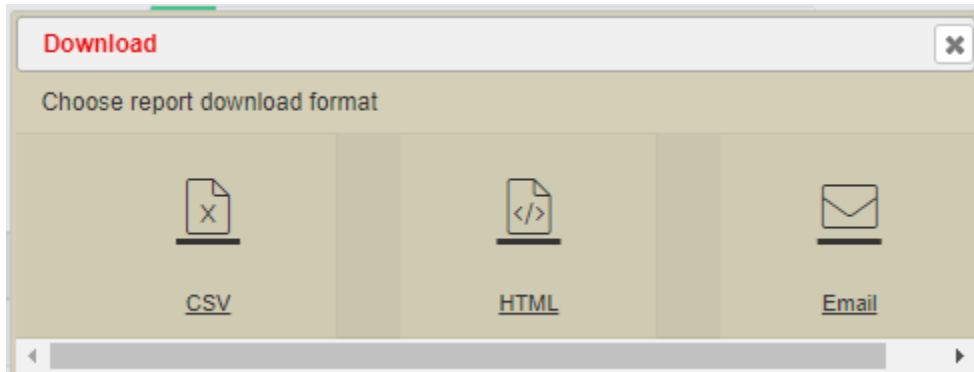
7.10.9 Help

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



7.10.10 Download

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

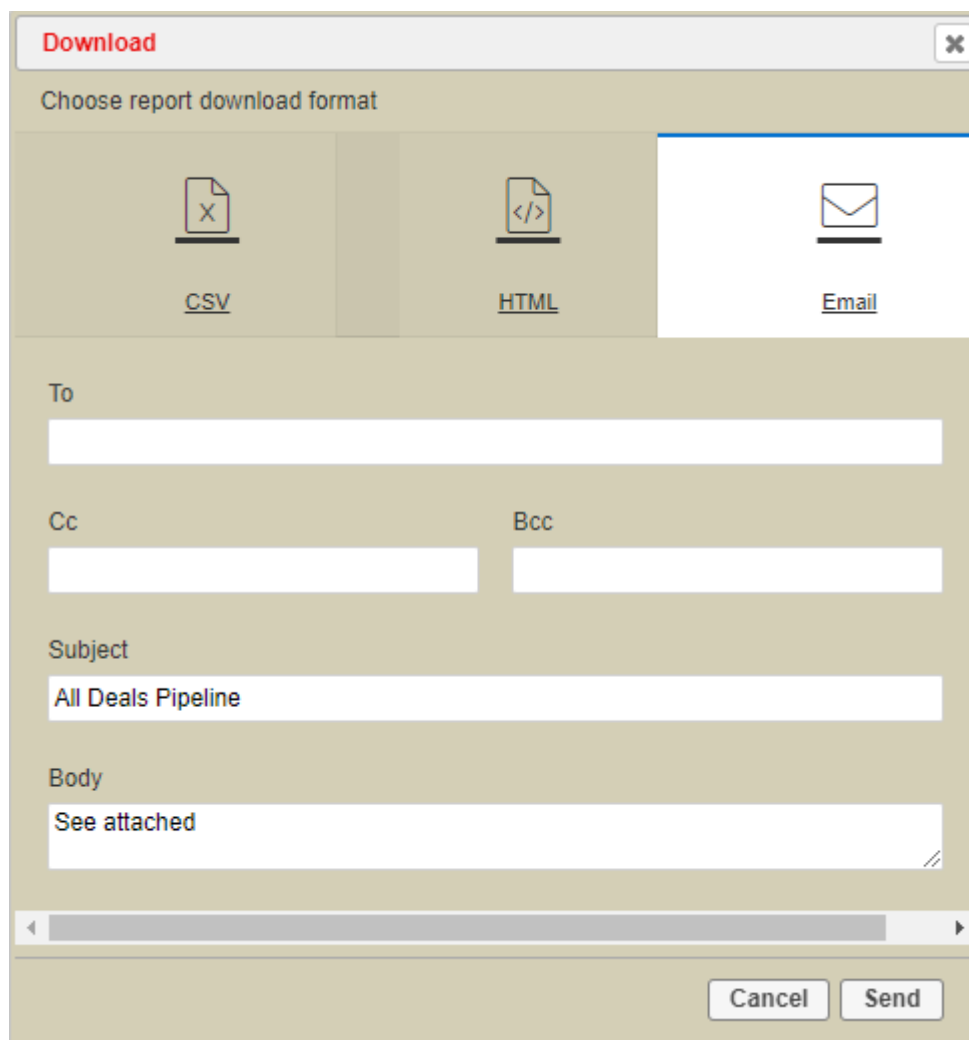


Selecting CSV or HTML will provide a pop-up file download box providing users the option to open, save or cancel.



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.





The screenshot shows a 'Download' dialog box with a title bar and a close button. The main heading is 'Choose report download format'. There are three buttons with icons: a file with an 'X' for 'CSV', a file with code symbols for 'HTML', and an envelope for 'Email'. The 'Email' button is highlighted with a blue border. Below the format selection, there are input fields for 'To', 'Cc', and 'Bcc'. The 'Subject' field is prepopulated with 'All Deals Pipeline'. The 'Body' field is prepopulated with 'See attached'. At the bottom right, there are 'Cancel' and 'Send' buttons.

Download

Choose report download format

 CSV

 HTML

 Email

To

Cc

Bcc

Subject

All Deals Pipeline

Body

See attached

Cancel Send