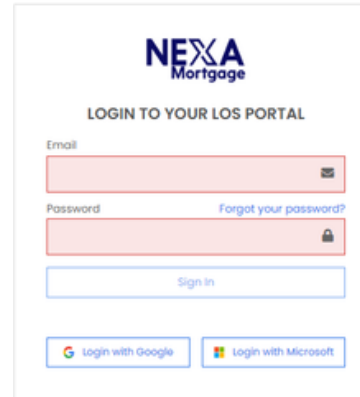


LO Payroll Request Procedure Guide for NEXA Lending Pad (Brokered)

1

Login to your **NEXA**
Lending Pad account



The screenshot shows the NEXA Mortgage login page. At the top is the NEXA Mortgage logo. Below it is the text "LOGIN TO YOUR LOS PORTAL". There are two input fields: "Email" and "Password". The "Password" field has a "Forgot your password?" link next to it. Below the input fields is a "Sign In" button. At the bottom, there are two buttons: "Login with Google" and "Login with Microsoft".

2

Click the Pipeline tab.



The screenshot shows a navigation bar with the word "Pipeline" in blue text, centered between two horizontal lines.

3

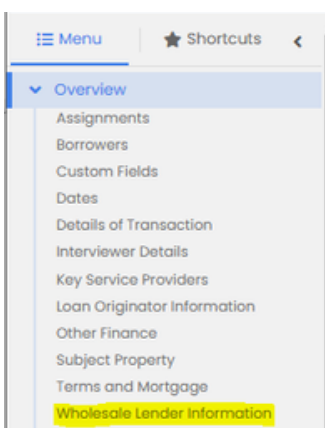
Select the file you will
be submitting to
payroll



The screenshot shows a file selection interface. On the left, there is a blue box containing a pencil icon and the text "#N161820". On the right, there is a grey button with a hamburger menu icon and the text "Closed".

4

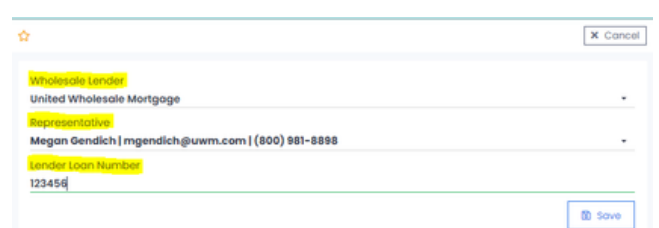
Once you open the file, go
to the Overview section,
then select Wholesale
Lender Information.



The screenshot shows a navigation menu with a "Menu" button and a "Shortcuts" button. The "Overview" section is expanded, showing a list of items: Assignments, Borrowers, Custom Fields, Dates, Details of Transaction, Interviewer Details, Key Service Providers, Loan Originator Information, Other Finance, Subject Property, Terms and Mortgage, and Wholesale Lender Information. The "Wholesale Lender Information" item is highlighted in yellow.

5

Click the Edit button,
enter the Lender Name,
Representative, and
Lender Loan Number, then
click **SAVE**.



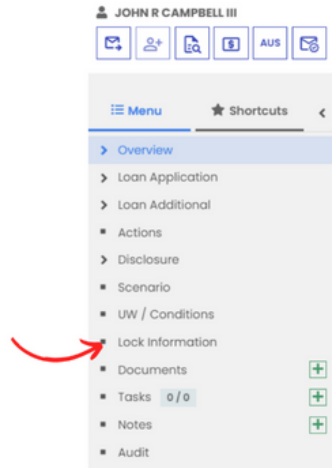
The screenshot shows a form for entering Wholesale Lender Information. The form has three fields: "Wholesale Lender" with the value "United Wholesale Mortgage", "Representative" with the value "Megan Gendich | mgendich@uwm.com | (800) 981-8898", and "Lender Loan Number" with the value "123456". There is a "Save" button at the bottom right and a "Cancel" button at the top right.

Lock Information

The lock information will need to be input in order to finalize the payroll request. Please follow the steps below

1

On the left side of your screen select the lock information



2

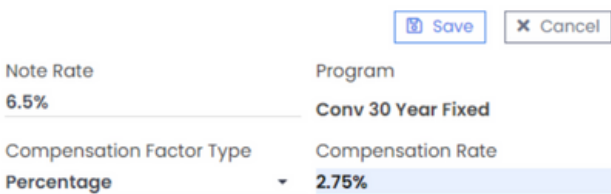
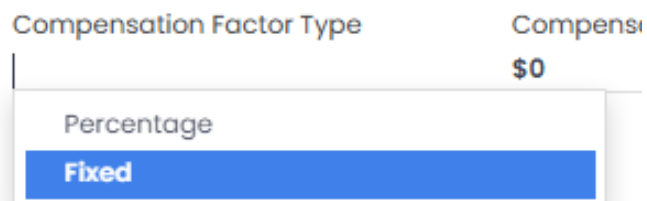
You will find the lock information here, simply select the edit button on the right hand side

Lock Information

Lock Price: 0.000%
Lock Status: None
Lock Date: -
Lock Period: 0 days
Lock Expired:

3

On the right hand side please select the compensation type in the drop down. Percentage or Fixed.. Kindly click Fixed

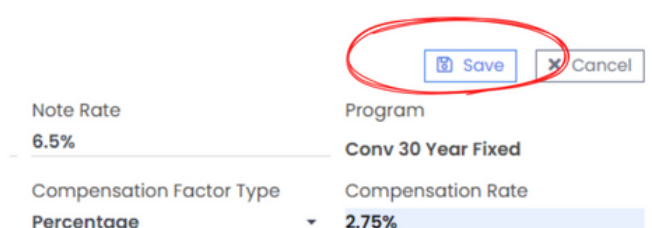


4

Then enter in the percentage or fixed amount.

5

From here, simply hit save at the top and continue.

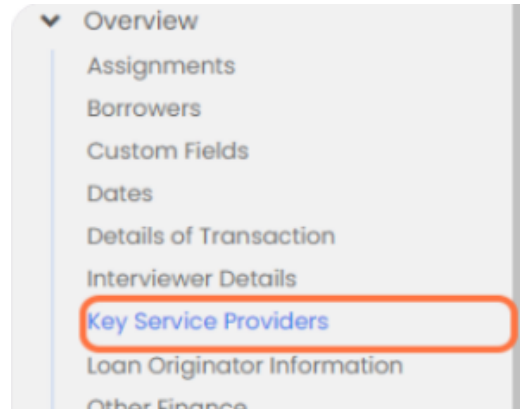


Title Company Information

The title company information will need to be input in order to finalize the payroll request. Please follow the steps below

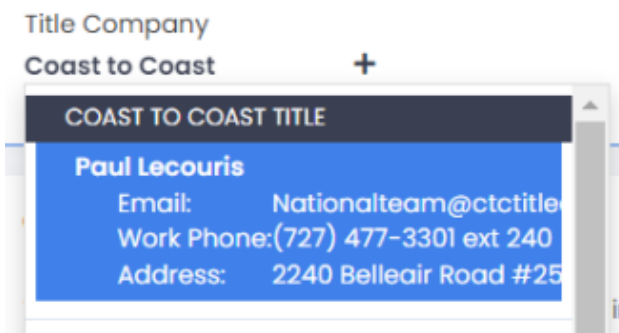
1

Open up the Overview section on the left and select Key Service Providers



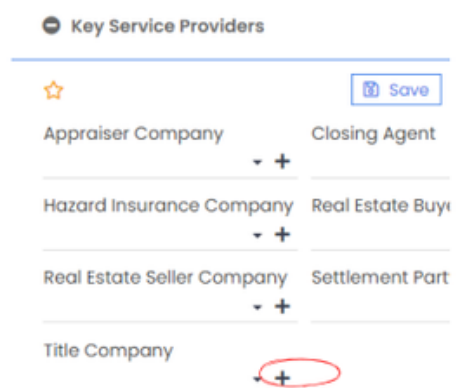
2

Once you have entered edit mode, you can start typing the name of the Title Company, if it comes up with the correct info, just select, save and continue.



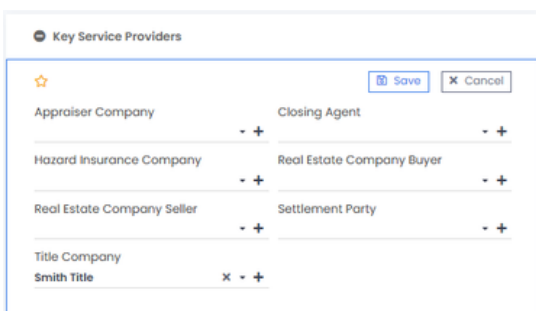
3

If your Title company does not come up, you will need to enter the information manually, you start this by hitting the + sign on the right



4

You can fill in the other fields if you know the information; if not, you can leave them blank.



5

From here, simply hit save at the top and continue on

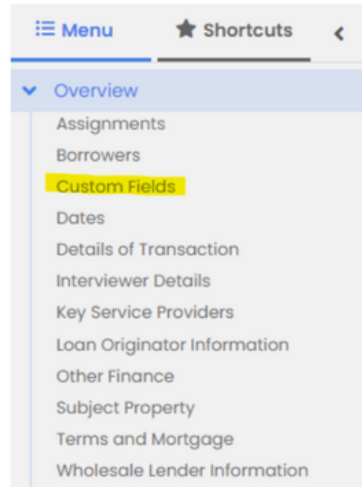


Custom Fields

The Custom Fields section will need to be completely filled out with no blanks in order to finalize the payroll request.

1

Open up the Overview section on the left and select Custom Fields



2

The first two sections just need to have your instructor name and who the loan was referred by. If neither of these apply please put N/A in each section

☆ Academy Instructor

Loan Referred By (if applicable)
Text

3

The next section has 3 drop downs and a date section. Please notate whether you are w2/1099, if the wire or check was received, what the lead type was and what date the wire/check was initiated.

W2 or 1099

Wire/Check Received

4

In this section Please list your Branch or LOA (if N/A please say so) and paid amount (if N/A please put 0)

The upper section is for LOS and Academy, those that are involved know what to put. Otherwise put N/A

NEXA Academy Loan <input type="text" value="No X"/>	Is this an LOS Referral? <input type="text" value="No X"/>
LO Support and paid amount <input type="text" value="NA"/>	Loan Referred By <input type="text" value="NA"/>
Broker-Lender/Borrower Paid <input type="text" value="Lender Paid"/>	Academy Instructor and paid amount (Brokered) <input type="text" value="NA"/>
Branch Name <input type="text" value="NA"/>	Branch (paid amount) <input type="text" value="\$0"/>
LOA Name 1 <input type="text" value="NA"/>	LOA 1 (paid amount) <input type="text" value="\$0"/>
LOA Name 2 <input type="text" value="NA"/>	LOA 2 (paid amount) <input type="text" value="\$0"/>

5

Broker Comp is the dollar amount of the BPS paid to NEXA
Credit Refund is only if you personally paid for it (if N/A put 0)
VOE is if you had to pay for a Verification of Employment (if N/A put 0)
Cure/Tolerance is only if there was one (if N/A put 0)

NEXA Broker Compensation \$0.00	Credit Refund (addition) \$0.00
VOE Refund (addition) \$0.00	Cure/Tolerance (minus) \$0.00

Custom Fields (cont.)

The Custom Fields section will need to be completely filled out with no blanks in order to finalize the payroll request.

6

You only put the amount of the processing fee here if it is included with the funds sent to NEXA

Processing Fee (addition) \$0.00
Additional (please detail amount) Text
Total Wire Amount - Must Equal Above \$0.00
Processing Check
Processing Check To (whom and what?) Text
Conversation Log

Charge to LO
Included with our Funds
Self Processed
Separate Check

7

The additional amount is for your other reimbursements like the Appraisal Fee.

The total wire amount is calculated by adding all of these fees/credits together

Additional (please detail amount)
\$200 - Appraisal Fee
Total Wire Amount - Must Equal Above (Brokered)
\$0

8

If NEXA needs to cut the check to the processor please list the company name and amount.

Please use the drop down to select Lender or Borrower Paid.

Processing Fee (addition) \$0.00
Additional (please detail amount) Text
Total Wire Amount - Must Equal Above \$0.00
Processing Check
Processing Check To (whom and what?) Text
Lender Paid or Borrower Paid

9

The conversation log is to put information you need to relay to payroll such as a request for funds to be added to your Divvy Card or information regarding Borrower Paid status.

Conversation Log
\$1500 to my Divvy Card

10

Completely filled out with no spots left blank select Save at the top and continue

Custom Fields
Academy Instructor
Loan Referred By (if applicable)

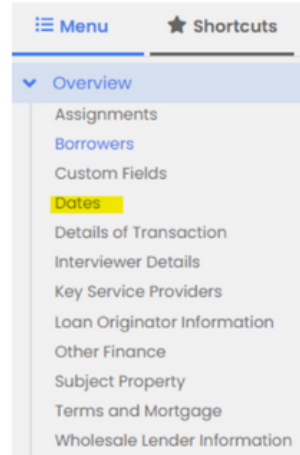
Save Cancel

Critical Dates

The Critical Dates section will need to be filled out correctly in order to finalize the payroll request.

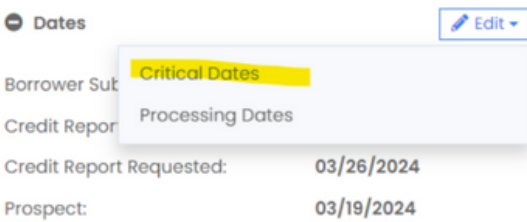
1

On the left hand side, under the Overview section, select “Dates”



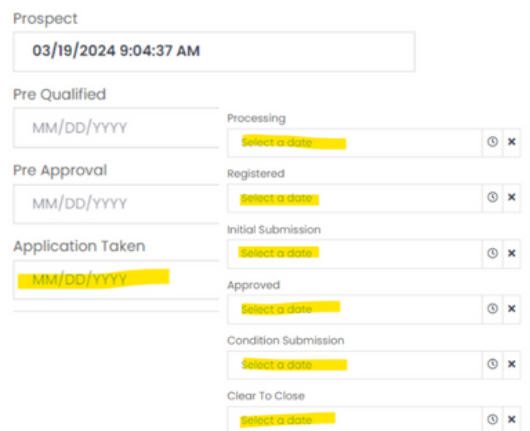
2

You will select to edit the Critical Dates



3

Your processor may or may not have entered these dates for you. If they did not, it is your responsibility to fill them in.



4

Ensure that the Prospect Date, Application Taken Date, and Closed Date fields are completed.

Prospect	Schedule Closing
05/26/2024 4:19:33 PM	MM/DD/YYYY
Pre-Qualify	Closing Estimate
MM/DD/YYYY	MM/DD/YYYY
Pre-Approval	Funding Estimate
MM/DD/YYYY	MM/DD/YYYY
Application Taken	Closed
06/12/2024	07/12/2024

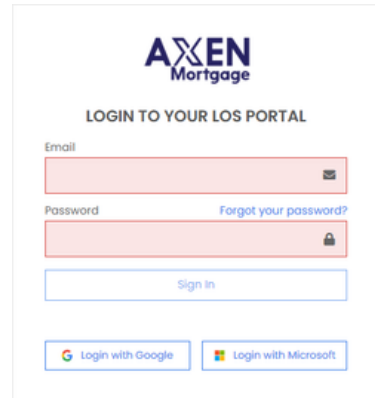


Please note that once the closing date is entered, the file will be submitted to Payroll, and further edits to the information will no longer be possible on the LO's end.

LO Payroll Request Procedure Guide for AXEN Lending Pad (Brokered)

1

Login to your **AXEN**
Lending Pad account



The image shows the AXEN Mortgage login portal. At the top is the AXEN Mortgage logo. Below it is the text "LOGIN TO YOUR LOS PORTAL". There are two input fields: "Email" and "Password". The "Password" field has a "Forgot your password?" link to its right. Below the input fields is a "Sign in" button. At the bottom, there are two buttons: "Login with Google" and "Login with Microsoft".

2

Click the Pipeline tab.



The image shows a horizontal navigation bar with several tabs. The "Pipeline" tab is highlighted in blue and is the focus of the instruction.

3

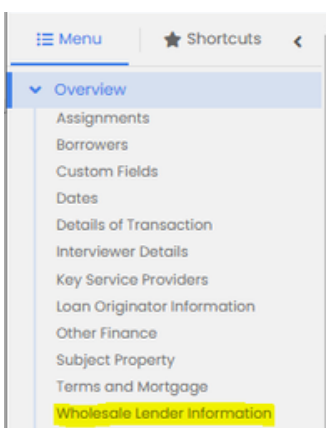
Select the file you will
be submitting to
payroll



The image shows a file selection interface. A blue box highlights a file with a pencil icon and the ID "#A035797". To the right, there is a grey button with a hamburger menu icon and the text "Funded".

4

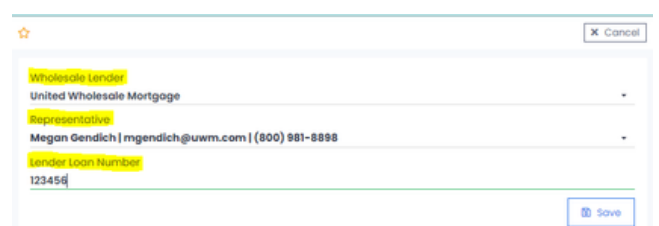
Once you open the file, go
to the Overview section,
then select Wholesale
Lender Information.



The image shows a sidebar menu with a "Menu" icon and a "Shortcuts" icon. The "Overview" section is expanded, showing a list of options: Assignments, Borrowers, Custom Fields, Dates, Details of Transaction, Interviewer Details, Key Service Providers, Loan Originator Information, Other Finance, Subject Property, Terms and Mortgage, and Wholesale Lender Information. The "Wholesale Lender Information" option is highlighted in yellow.

5

Click the Edit button,
enter the Lender Name,
Representative, and
Lender Loan Number, then
click **SAVE**.



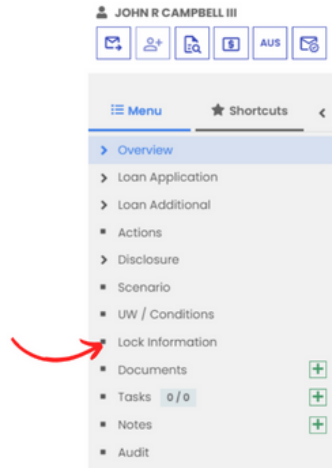
The image shows a form titled "Wholesale Lender Information". It has a "Cancel" button in the top right corner. The form contains three fields: "Wholesale Lender" with the value "United Wholesale Mortgage", "Representative" with the value "Megan Gendich | mgendich@uwm.com | (800) 981-8898", and "Lender Loan Number" with the value "123456". There is a "Save" button in the bottom right corner.

Lock Information

The lock information will need to be input in order to finalize the payroll request. Please follow the steps below

1

On the left side of your screen select the lock information



2

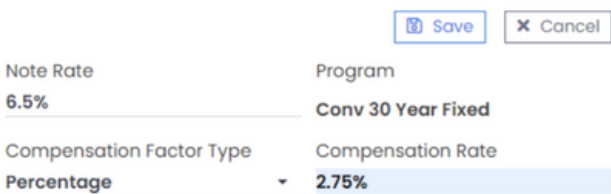
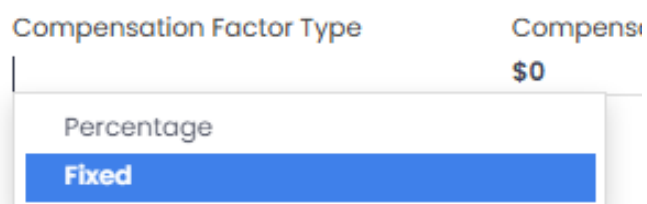
You will find the lock information here, simply select the edit button on the right hand side

Lock Information

Lock Price: 0.000%
Lock Date: -
Lock Expired:
Lock Status: None
Lock Period: 0 days

3

On the right hand side please select the compensation type in the drop down. Percentage or Fixed.. Kindly click Fixed

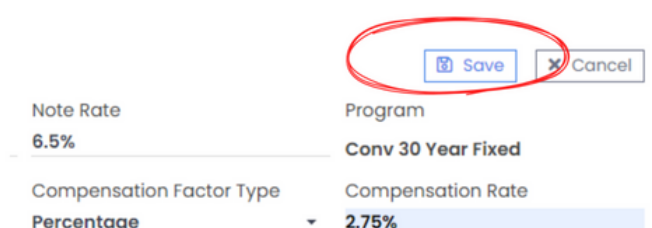


4

Then enter in the percentage or fixed amount.

5

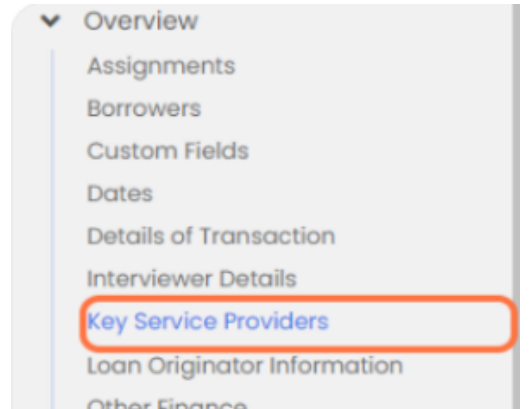
From here, simply hit save at the top and continue.



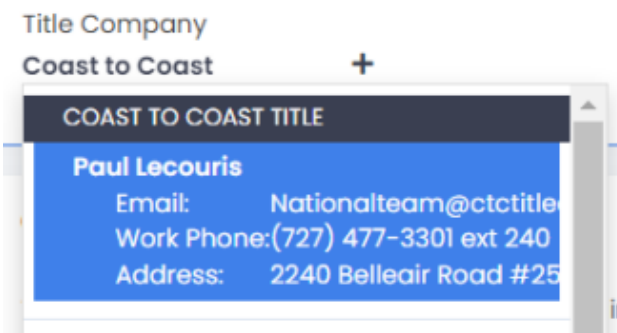
Title Company Information

The title company information will need to be input in order to finalize the payroll request. Please follow the steps below

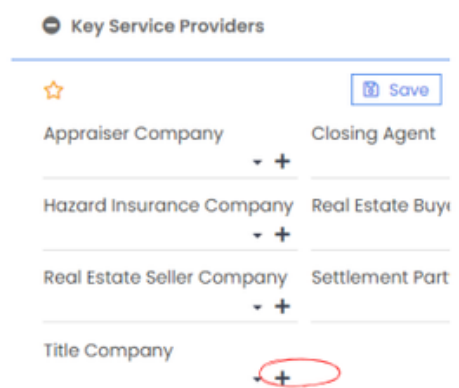
1 Open up the Overview section on the left and select Key Service Providers



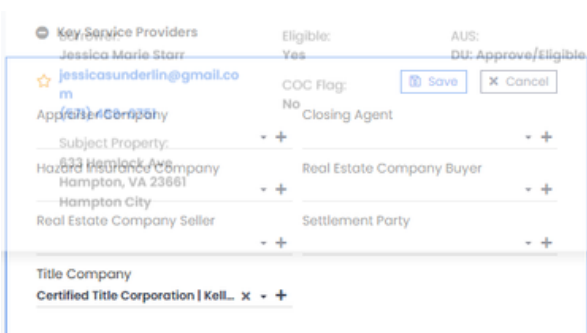
2 Once you have entered edit mode, you can start typing the name of the Title Company, if it comes up with the correct info, just select, save and continue.



3 If your Title company does not come up, you will need to enter the information manually, you start this by hitting the + sign on the right



4 You can fill in the other fields if you know the information; if not, you can leave them blank.



5 From here, simply hit save at the top and continue on

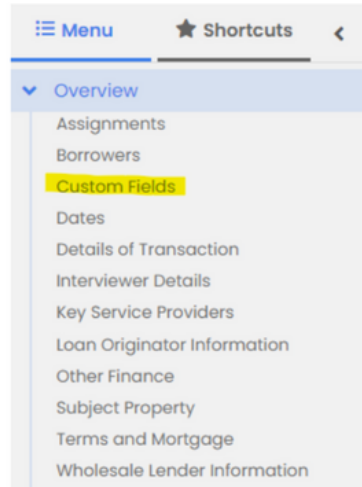


Custom Fields

The Custom Fields section will need to be completely filled out with no blanks in order to finalize the payroll request.

1

Open up the Overview section on the left and select Custom Fields



2

The first two sections just need to have your instructor name and who the loan was referred by. If neither of these apply please put N/A in each section

☆ Academy Instructor

Loan Referred By (if applicable)
Text

3

The next section has 3 drop downs and a date section. Please notate whether you are w2/1099, if the wire or check was received, what the lead type was and what date the wire/check was initiated.

W2 or 1099

Wire/Check Received

4

In this section Please list your Branch or LOA (if N/A please say so) and paid amount (if N/A please put 0)

The upper section is for LOS and Academy, those that are involved know what to put. Otherwise put N/A

NEXA Academy Loan <input type="text" value="No X"/>	Is this an LOS Referral? <input type="text" value="No X"/>
LO Support and paid amount <input type="text" value="NA"/>	Loan Referred By <input type="text" value="NA"/>
Broker-Lender/Borrower Paid <input type="text" value="Lender Paid"/>	Academy Instructor and paid amount (Brokered) <input type="text" value="NA"/>
Branch Name <input type="text" value="NA"/>	Branch (paid amount) <input type="text" value="\$0"/>
LOA Name 1 <input type="text" value="NA"/>	LOA 1 (paid amount) <input type="text" value="\$0"/>
LOA Name 2 <input type="text" value="NA"/>	LOA 2 (paid amount) <input type="text" value="\$0"/>

5

Broker Comp is the dollar amount of the BPS paid to NEXA
Credit Refund is only if you personally paid for it (if N/A put 0)
VOE is if you had to pay for a Verification of Employment (if N/A put 0)
Cure/Tolerance is only if there was one (if N/A put 0)

NEXA Broker Compensation \$0.00	Credit Refund (addition) \$0.00
VOE Refund (addition) \$0.00	Cure/Tolerance (minus) \$0.00

Custom Fields (cont.)

The Custom Fields section will need to be completely filled out with no blanks in order to finalize the payroll request.

6

You only put the amount of the processing fee here if it is included with the funds sent to NEXA

Processing Fee (addition)
\$0.00

Additional (please detail amount)
Text

Total Wire Amount - Must Equal Above
\$0.00

Processing Check To (whom and what?)
Text

Conversation Log

Processing Check

- Charge to LO
- Included with our Funds
- Self Processed
- Separate Check

Processing Fee (addition)
\$0.00

Additional (please detail amount)
Text

Total Wire Amount - Must Equal Above
\$0.00

Processing Check To (whom and what?)
Text

Lender Paid or Borrower Paid

7

The additional amount is an amount you decided to give the processor over and above their

Processing fee. The total wire amount is calculated by adding all of these fees/credits together

8

If NEXA needs to cut the check to the processor please list the company name and amount.

Please use the drop down to select Lender or Borrower Paid.

Processing Fee (addition)
\$0.00

Additional (please detail amount)
Text

Total Wire Amount - Must Equal Above
\$0.00

Processing Check To (whom and what?)
Text

Lender Paid or Borrower Paid

Conversation Log
\$1500 to my Divvy Card

9

The conversation log is to put information you need to relay to payroll such as a request for funds to be added to your Divvy Card or information regarding Borrower Paid status.

10

Ensure this section is completely filled out with no blank fields. Click the 'Ready for Payroll' button to submit the file to payroll, and then select Save at the top.

Ready for Payroll?

Yes

Custom Fields

Academy Instructor

Loan Referred By (if applicable)

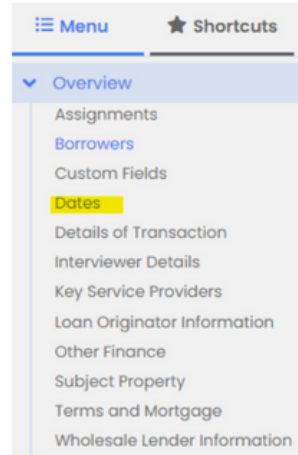
Save Cancel

Critical Dates

The Critical Dates section will need to be filled out correctly in order to finalize the payroll request.

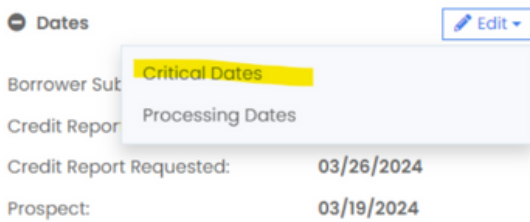
1

On the left hand side, under the Overview section, select “Dates”



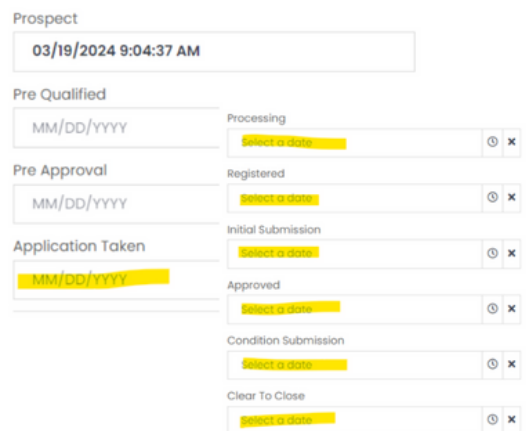
2

You will select to edit the Critical Dates



3

Your processor may or may not have entered these dates for you. If they did not, it is your responsibility to fill them in.



4

Ensure that the Prospect Date, Application Taken Date, Closed Date and Funded Date fields are completed.

Lead	Schedule Closing	
10/19/2024 8:18:26 AM	MM/DD/YYYY	✕
Pre-Qualify	Closing Estimate	✕
MM/DD/YYYY	MM/DD/YYYY	✕
Pre-Approval	Funding Estimate	✕
MM/DD/YYYY	MM/DD/YYYY	✕
Application Taken	Closed	✕
10/21/2024	MM/DD/YYYY	✕
Loan Locked	Funded	✕
	MM/DD/YYYY	✕



Please note that once the closed date and funded date are entered, the file will be submitted to Payroll, and further edits to the information will no longer be possible on the LO's end.