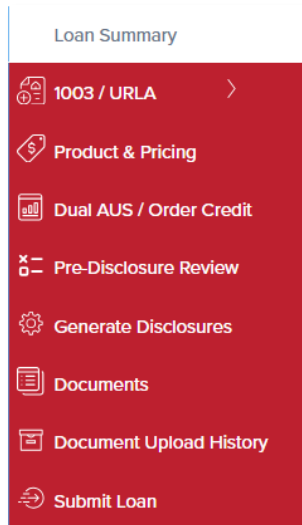


Purpose

To support and streamline the loan workflow, updates have been implemented within the Loan Manager system. These updates include the removal of the requirement to submit a loan prior to generating disclosures.

Updated Workflow



After you have added a new loan to the system, you will go through the following tasks:

- Review the 1003/URLA to ensure all data points flowed over correctly
- Select Product & Pricing for the loan
- Order or Reorder Credit and AUS
- Click on Pre-Disclosure Review to ensure all data is accurate to register the loan
- Generate Disclosures – for additional details on how to complete this step, please refer to the [Broker Generated Disclosure Job Aid](#)
Please note: If you are uploading a Correspondent submission or have selected a different disclosure path on your Wholesale loan, generate disclosures may be unavailable or skipped
- Upload Documents you wish to have reviewed at the time of submission.
Please note: Document Upload History is a new feature you can use to review what documentation has been submitted and when.
- Submit Loan – this is when the loan will come over to us for review.

Instructions

STEP 1

- Click on the Pre-Disclosure Review.
- Review the information to ensure it is accurate, then click Confirm.
- This is going to register the loan within our system but will not be submitted. *Note: If anything is inaccurate, go back to the 1003/URLA section to update and save.*

LoanManager Contact Us Test AE

Welcome Pipeline Add New Loan Quick Pricer NDM Links NDM Training and Webinars FHAVA Lender IDs Need Help? Documents

Test Test Started Wh

Loan Program: Nations Direct Mortgage, LLC - Wholesale
Total Loan Amount: \$320,000.00
Assigned AMC: cb0bae97-6c13-45f6-9f9f-bf35d387e...

Loan Type: Conventional
Loan Purpose: Purchase
Interest Rate: 5.740%
LTV: 64.000%
CLTV: 64.000%

Pre-Disclosure Review

Overview

Application Date	Submission Status	Initial Pre-Disclosure Review Date	Last Pre-Disclosure Review Date
12/24/2025	-	-	-

Borrower

Field	Value
First Name	Test
Middle Name	F.
Suffix	-
Last Name	Test
Cell Phone Number	955-555-5555
Email Address	test@tech_testing@myndm.com
SSN	###-##-####

Co-Borrower

Field	Value
First Name	-
Middle Name	-
Suffix	-
Last Name	-
Cell Phone Number	-
Email Address	-
SSN	###-##-####

Subject Property Address

Field	Value
Street Address	-
City	-
State	-
Zip	-
County	-

Property Type

Field	Value
Property Type	Detached
Occupancy Type	OwnerOccupied
Number Of Units	1

Product & Pricing

Field	Value
Loan Program	Nations Direct Mortgage, LLC - Wholesale - NEW Conventional 30 Yr Fixed DU - Florida
Loan Type	Conventional
Interest rate	5.740%
Price	-
Lock Expiration date	-
Interest Only(Months)	-

Loan Details

Field	Value
Loan Purpose	Purchase
Purchase Price	\$500,000
Base Loan Amount	\$320,000
Total Loan Amount	\$320,000
Estimated value	\$500,000
Appraised Value	\$500,000
Authorization Term	360
Estimated Closing Date	01/30/2026

Confirm

If anything is incomplete, you will receive a pop-up message that looks like this. The information must be completed to move forward.

Required Fields

Please complete the following field to complete required state licenses:

2306 - LO State License ID

FIELD ID	FIELD NAME	FORM	FIELD
Information for Government Monitoring (1)			
2306	Interviewer's License Number	Information for Government Monitoring	<input type="text"/>
Not Available on Form (1)			
1401	Loan Program	Not Available on Form	<input type="text"/>

Cancel Save

STEP 2

Once registered, you will receive a Success message.

Next steps (*not documented here*) are to [Generate Disclosures](#) and Upload Documents.

Pre-Disclosure Review

Overview

Application Date 01/14/2026	Submission Status Submitted	Initial Pre-Disclosure Review Date 01/14/2026	Last Pre-Disclosure Review Date 01/14/2026
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Borrower

First Name Test	Middle Name F.	Last Name -	Cell Phone Number 555-555-5555	Email Address docutech_testing@myndm.com	SSN ###-##-4440
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Co-Borrower

First Name -	Middle Name -	Last Name -	Cell Phone Number -	Email Address -	SSN ###-##-####
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Subject Property Address

Street Address 1596 Shale Trail Loop	City The Villages	State FL	Zip 32163	County Sumter
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Property Type
Detached

Occupancy Type
OwnerOccupied

Number Of Units
1

Product & Pricing

Loan Program Nations Direct Mortgage, LLC - Wholesale - NEW Conventional 30 Yr Fixed DU - Florida	Loan Type Conventional	Interest rate 5.740%	Price -	Lock Expiration date -	Interest Only(Months) -
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Loan Details

Loan Purpose Purchase	Purchase Price \$500,000	Base Loan Amount \$320,000	Total Loan Amount \$320,000	Estimated value \$500,000	Appraised Value \$500,000	Authorization Term 360	Estimated Closing Date 01/30/2026
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Success

STEP 3

When you are ready for the loan to go over to our Loan Setup Team for review, click on Submit Loan

Loan Summary

1003 / URLA

Product & Pricing

Dual AUS / Order Credit

Pre-Disclosure Review

Generate Disclosures

Documents

Document Upload History

Submit Loan

STEP 4

Once submitted, you will receive a notification showing the submission is successful. In addition, it will show the Submission Status as Submitted along with the Initial Submit Loan Date and Last Submit Loan Date.

Submit Loan

Overview

Application Date

01/13/2026

Submission Status

Submitted

Initial Submit Loan Date

01/13/2026

Last Submit Loan Date

01/14/2026

Borrower

First Name

Test

Middle Name

F.

Suffix

-

Last Name

Test

Cell Phone Number

555-555-5555

Email Address

docutech_testing@myndm.com

SSN

###-##-1111

Co-Borrower

First Name

-

Middle Name

-

Suffix

-

Last Name

-

Cell Phone Number

-

Email Address

-

SSN

###-##-####

Subject Property Address

Street Address

City

State

Zip

County

Property Type

Occupancy Type

Number Of Units

Detached

OwnerOccupied

1

Product & Pricing

Loan Program

30 Yr Fixed - Fannie

Loan Type

Conventional

Interest rate

5.000%

Price

97.614

Lock Expiration date

-

Interest Only(Months)

-

Loan Details

Loan Purpose

Purchase

Purchase Price

\$1,000,000

Base Loan Amount

\$700,000

Total Loan Amount

\$700,000

Estimated value

\$1,000,000

Appraised Value

\$1,000,000

Authorization Term

360

Estimated Closing Date

02/20/2026

Information contained is Subject to Change. This information is provided for your convenience and Nations Direct Mortgage, LLC makes no warranties concerning the accuracy or completeness of any of the information. This is not compliance or legal advice and should not be taken as such. This information is for mortgage professionals only and is not intended for distribution to consumers.