

TRACKING & ORGANIZING YOUR LOAN DATA

1

Sortable Loan List

Presented here is a list of your brokered loans

This list is fully sortable and filterable.

2

Download the List

You can download this list, in a CSV form.

Create a secure password.

3

Drill Down to Loan Details

Click on the loan number for more details on each loan.

The loan # is an internal tracking index that Visio uses to identify your loan.

4

Loan Details

Clicking on the loan # will bring you to a Loan Detail Page.

This page includes all key loan information, documents for the loan and loan status.

5

Loan Fields

Look to the right for an explanation of the loan fields.

