

Ventures Knowledgebase:

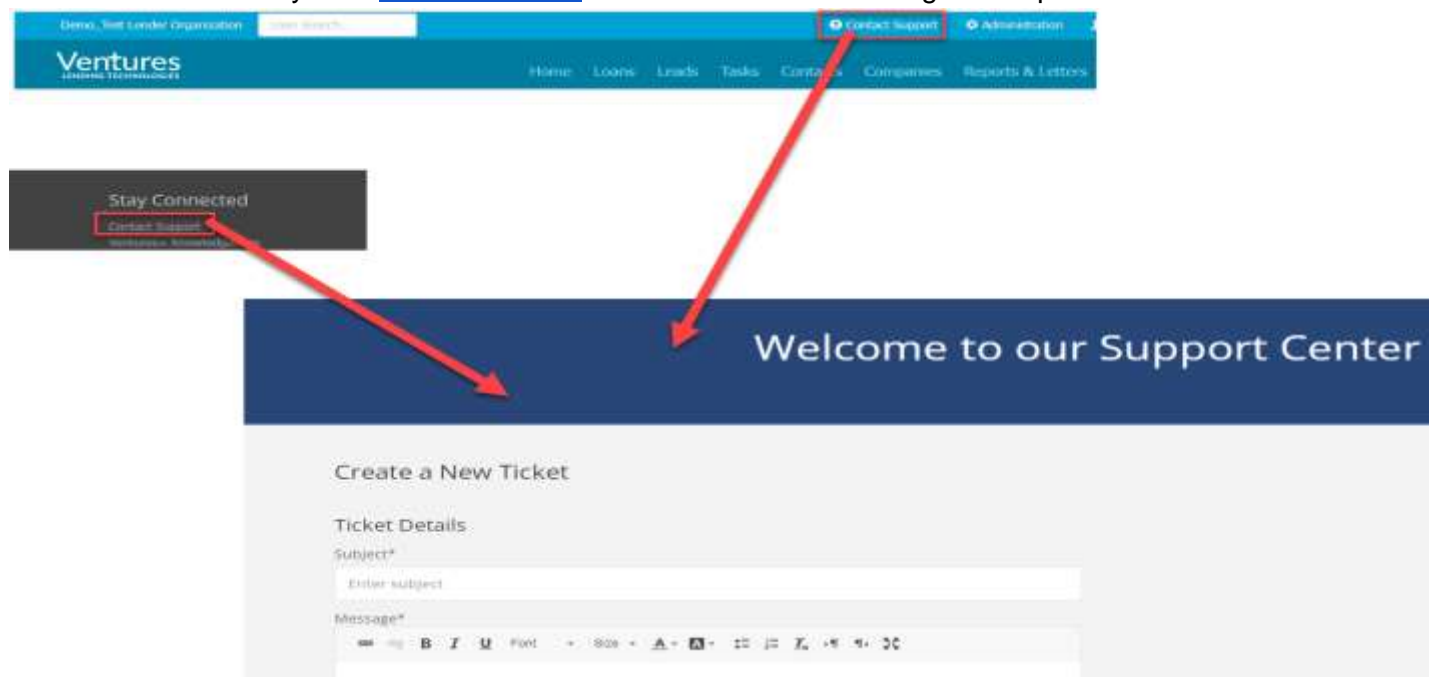
Did you know that Ventures has a Knowledge Base platform where you have access to helpful Articles, Videos, and even [Submit](#) a Support Ticket?

- Access the Ventures Knowledge Base widget located on the lower section of Ventures: **Stay Connected** section or bookmark <https://ventures.happyfox.com/home/>
- Have new employees? Need a refresher? Access the unedited Ventures Foundational series recorded videos located within the Knowledge Base platform or [HERE](#).



New Contact Support Widget:

- The **Contact Support** buttons that are visible on the upper right section and lower section of Ventures will now route you to [Submit a Ticket](#) via the Ventures Knowledge Base platform.



New Enhancement to Address fields:

- The Address fields throughout Ventures have been enhanced in an effort to assist you with your data input. Addresses are now validating using Google Address Autocomplete. To further ensure that there are no issues in submitting to SBA, we also format to the USPS standard. If an address is not found please validate the address by visiting the [USPS Zip Lookup](#) tool and update your address in Ventures accordingly.
 - **View the video demonstrating the enhancement [HERE](#)**

4506 Form line 5a:

- The completion of line 5a is only required for lenders who do not use a 3rd party vendor and submit their transcript request directly to the IRS. This allows the IRS to know who to mail the transcripts back to.
- **Lender Action: Only if you submit transcript requests directly to the IRS and do not use a 3rd party vendor:**
 - Administration > Default Organization > Document Settings tab > Form 4506-C Section
 - Enter the Address you'd like to appear on line 5a and Save
 - Generate form 4506 and line 5a will auto populate based on the data input within Administration

Edit Organization

Company Fees **Document Settings**

SBA Form 1244

Section XVIII

General

☐ Staff Changes Since Last Debenture Request?
Has any member, officer, director or professional staff of CDC changed since last debenture request?

☐ If staff changes, 1081/Resume Submitted?
Form 1081 & resume submitted to SBA.

☒ Do not show purpose
This will hide the loan purpose, and instead show 'See Credit Memo' (if comment exists).

Form 4506-C

Specify an IVES address to be used for 4506-C Request for Tax Transcript Form on line 5a (leave blank if using third party tax transcript vendor)

IVES Address 1234 Test Ave. San Diego, CA 92106

5a. IVES participant name, address, and SOR mailbox ID
1234 Test Ave. San Diego, CA 92106