Gateway 2.0 Cheat Sheet

Ventures
LENDING TECHNOLOGIES
part of the LENDERS COOPERATIVE family.

What's Changing?

- Gateway applications and documents will be available for review in Ventures
- Lenders can start applications in Ventures and send them to Applicants to fill out.
- Referral codes/links and email notifications for Gateway applications are set up in Ventures Users' Profile menu
- Only Gateway Administrators can log in to Gateway to edit application forms, document requests, or customize site.
- Gateway Administrators will not be able to access applications in Gateway.
- Lender Users with Staff or Manager permission levels will not be able to log into Gateway.

What's Not Changing?

- Nothing is changing for your Applicants. Applicants will still register, log in, complete applications, submit documents and message in Gateway.
- Gateway Application Forms and Document Requests are still built in Gateway by Gateway Site Administrators.
- Third Parties need to added in Gateway by Gateway Site Administrators. After a Third-Party registers, they will appear as an option to select in Ventures.

Possible To Do's after 2.0 release

- If your team uses Referral Codes, they will need to individually add their code in Ventures > Profile icon > Edit Profile menu > Gateway Application Link Builder section.
- Set your Gateway application email notification preferences in Ventures > Profile icon > Notifications menu.
- Update Loan officer and other partner contact assignments in Ventures records. During the migration, if there were assigned Gateway Staff Users to applications, then in Ventures, we brought over the assignments using the following logic:
    - Look at email of Gateway User assigned and compare with Ventures user email, if there was a match, we assigned the Ventures user as the Loan Officer on the application
    - If more than one Gateway user was assigned to the application, we picked one valid Ventures user to assign as the Loan Officer. We then added the rest of assigned Gateway Staff Users to the Notes section with name and email
- To access Gateway applications, the user must be a Ventures user. Your Ventures Site Administrator may need to add additional users to the Ventures site. Please have your Ventures Site Administrator contact Support if you need to add a user seat.
- Update Ventures User Permissions. Your Ventures Site Administrator may need to edit your Ventures user permission set if you cannot view Ventures records with Gateway applications or if you cannot access the Documents menu.
- Credit Pull/Report Users: Your Gateway Site Administrator will need to set a Credit Report Document Type in Gateway site> Site Settings >Credit menu. This will allow your credit reports to automatically drop into the correct document type bucket when received.

Q&A

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- What applications were migrated over from Gateway into Ventures?
  - Applications that were in Open, Submitted, More Information Needed, or Reviewed status AND the Last Activity on the application is within 60 days
- What does Last Activity mean?
  - There was an update to field in application, a data portion of an application had been submitted by applicant(s), or a document was uploaded to a document request
- How do I find Gateway applications in Ventures?
  - Go to Loans menu > Gateway filter to see a list of Ventures records with associated Gateway Applications
- How do I review the applicant(s) responses to their application?
  - In the Ventures record, go to Application > Data menu
- How do I review the applicant(s) uploaded documents?
  - In the Ventures record, go to Documents > Requests menu
- Where can I find instructions and videos to learn about the new process?
  - You can find instructions on our Gateway 2.0 Hub Page. Click here to access it!