



# Welcome to the Borrower Portal

Borrower Portal:

First Steps & General Overview



Borrower Portal:

First Steps & General Overview

# 1. Log In To Your Borrower Portal

[https://catalystfunding.liquidlogics.com/HM\\_borrowerportal.aspx](https://catalystfunding.liquidlogics.com/HM_borrowerportal.aspx)

Enter:

## Borrower Portal

Welcome, log in to work  
on your loan.

Login

[Reset password](#)



Once Logged in you will see the landing page shown below.

**My Loans & Lines of Credit**

[\\$ View My Loans](#) [View My LoC](#)

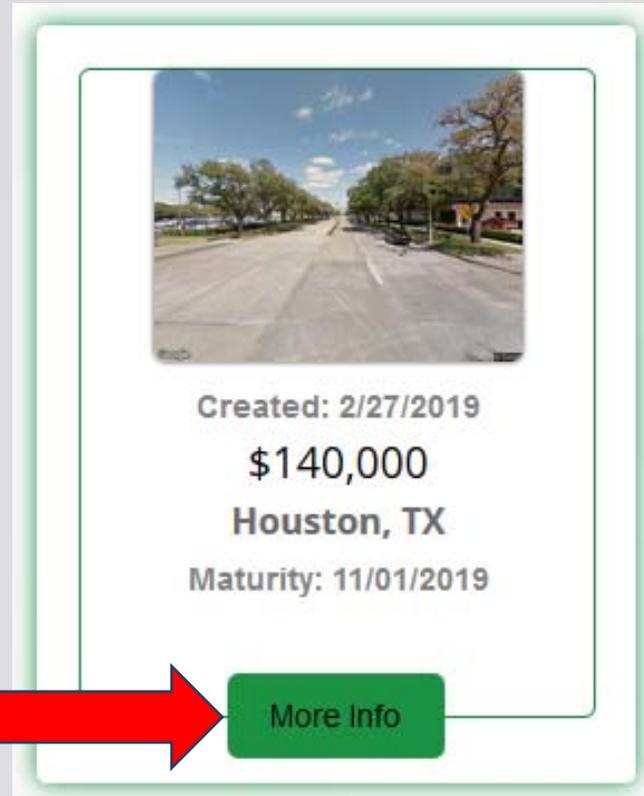


Created: 2/27/2019  
**\$140,000**  
Houston, TX  
Maturity: 11/01/2019

[More Info](#)

**Welcome**  
**YOUR NAME**  
You have the ability to create multiple loans. To create a new loan click "Start New Loan" at the top. If you have multiple loans, please select which loan you would like to work with by clicking on the Loan Details or the "More Info" button.

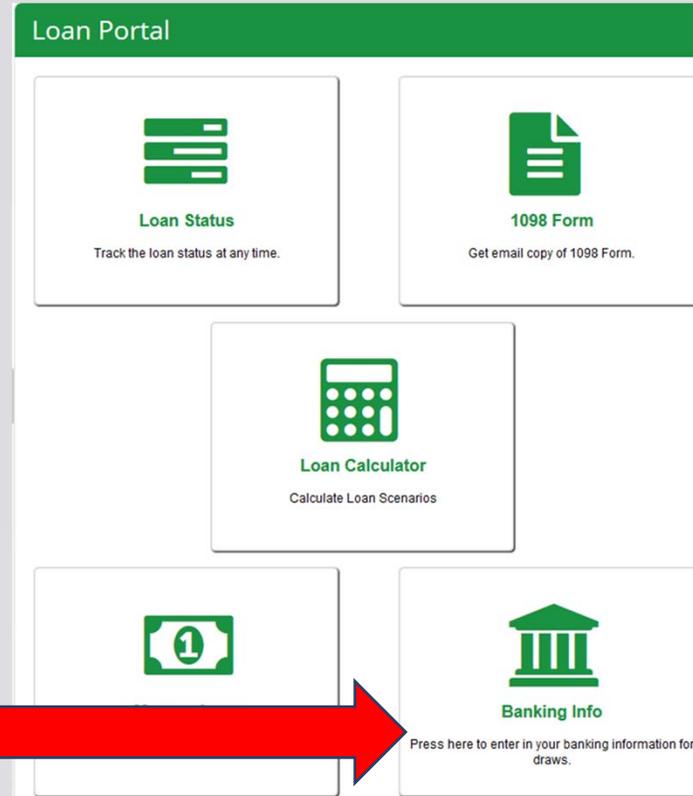
2. Click on your loan or on the "More Info" button.

A loan card with a white background and a green border. At the top is a photograph of a paved road lined with trees under a blue sky. Below the photo, the text reads: "Created: 2/27/2019", "\$140,000", "Houston, TX", and "Maturity: 11/01/2019". At the bottom right is a green button with the text "More Info". A large red arrow points from the left towards this button.

Created: 2/27/2019  
\$140,000  
Houston, TX  
Maturity: 11/01/2019

More Info

3. Locate the  
“Banking Info”  
box,  
then click on  
“Banking Info”



Loan Portal

**Loan Status**  
Track the loan status at any time.

**1098 Form**  
Get email copy of 1098 Form.

**Loan Calculator**  
Calculate Loan Scenarios

**Banking Info**  
Press here to enter in your banking information for draws.



4. Enter your banking information for ACH's.  
This is how you will receive & make all  
payments.

Bank Information		
Bank Name: <input type="text"/>	Beneficiary Bank: <input type="text"/>	Address: <input type="text"/>
City: <input type="text"/>	State: <input type="text" value="Alabama"/>	Zip: <input type="text"/>
Phone: <input type="text"/>	RTN #: <input type="text"/>	Acct #: <input type="text"/>



Adding a scope of work:

One line item at a time

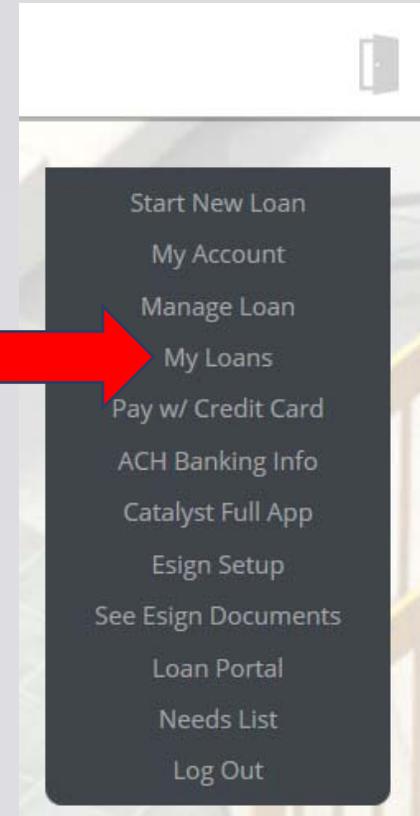
Please make sure to save your banking information.

Now lets continue with a brief overview of the rest of the Portal.

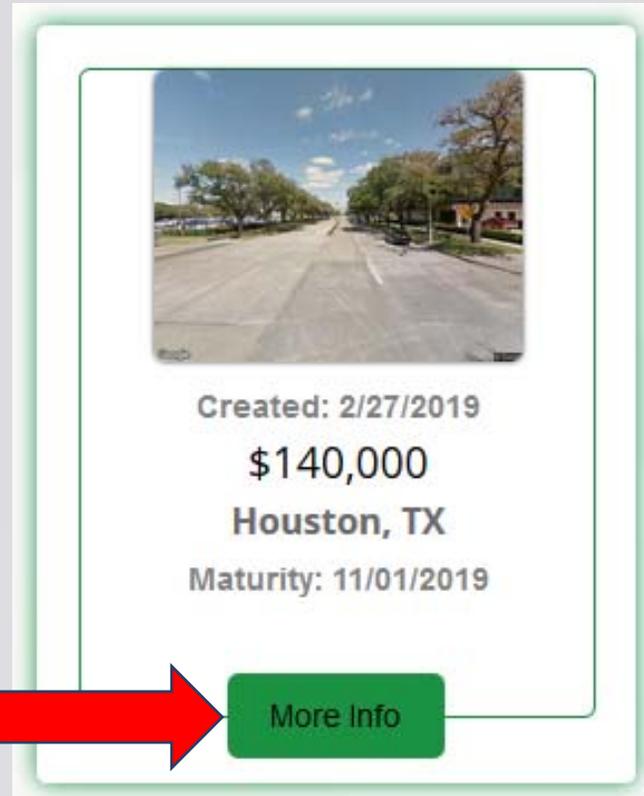
Please note the gray opened door icon in the upper right side of the page.

Clicking on this icon will bring up a menu to navigate to other pages.

Clicking on "My Loans" will bring you back to the original landing page.



Click on your  
loan or on the  
“More Info”  
button.



Created: 2/27/2019  
\$140,000  
Houston, TX  
Maturity: 11/01/2019

More Info

This brings you to the Loan Portal page. Lets explore the other boxes on this page.

**Loan Portal**



**Loan Status**  
Track the loan status at any time.



**1098 Form**  
Get email copy of 1098 Form.



**Loan Calculator**  
Calculate Loan Scenarios



**Manage Loan**  
View and Manage Loan



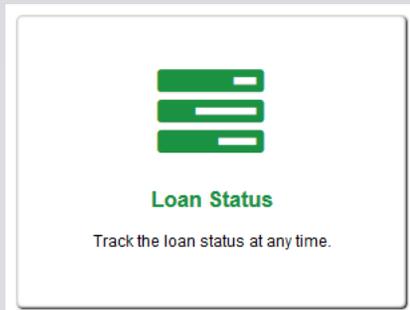
**Banking Info**  
Press here to enter in your banking information for draws.



**Needs List**  
Upload all required documents.



**My Loans**  
View and navigate to any of your loans.



**Loan Status** Maturity Date: 9/1/2019 12:00:00 AM Loan ID: 49024 ⓘ

**Application 38%**  
\_\_\_\_\_

**Completed Initial Needs**  
\_\_\_\_\_

**Rate Status** **No Rate**  
\_\_\_\_\_

**Underwriting**  
\_\_\_\_\_

**Closing**  
\_\_\_\_\_

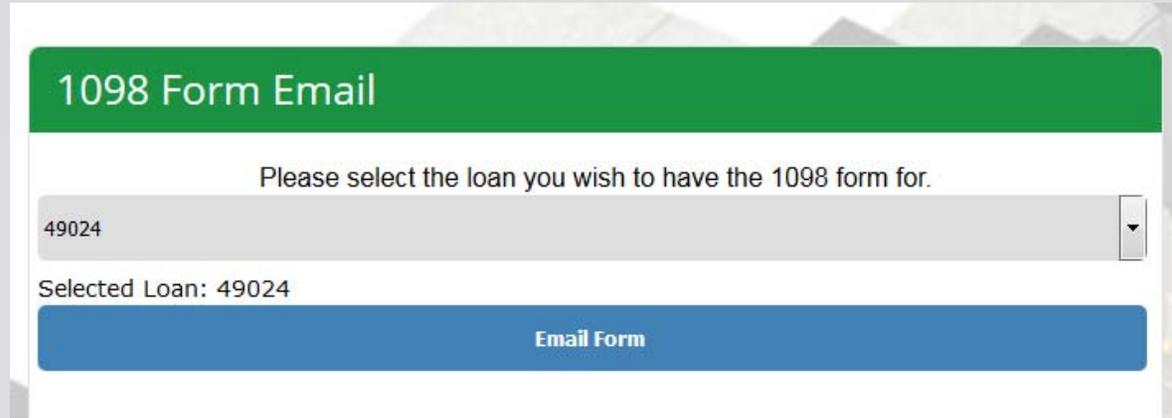
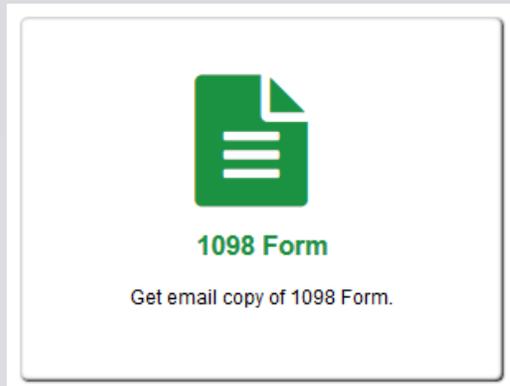
**Ready to Close** **Closing Date TBD**  
\_\_\_\_\_

**Welcome**

Here you will see status bars that show you how far along you are in the loan process. Please remember to fill out the Full App and upload your Needs via the Needs List.

 Home  Messages  Team

The "Loan Status" gives you a quick view of how far along you are in the loan process.

The image shows a web form titled "1098 Form Email" in a green header. Below the header, there is a text prompt: "Please select the loan you wish to have the 1098 form for." This is followed by a dropdown menu with "49024" selected. Below the dropdown, it says "Selected Loan: 49024". At the bottom of the form is a blue button labeled "Email Form".

**1098 Form Email**

Please select the loan you wish to have the 1098 form for.

49024

Selected Loan: 49024

**Email Form**

The "1098 Form" icon will bring you to a page to request an emailed copy of the 1098 Form.



### Loan Calculator

Calculate Loan Scenarios

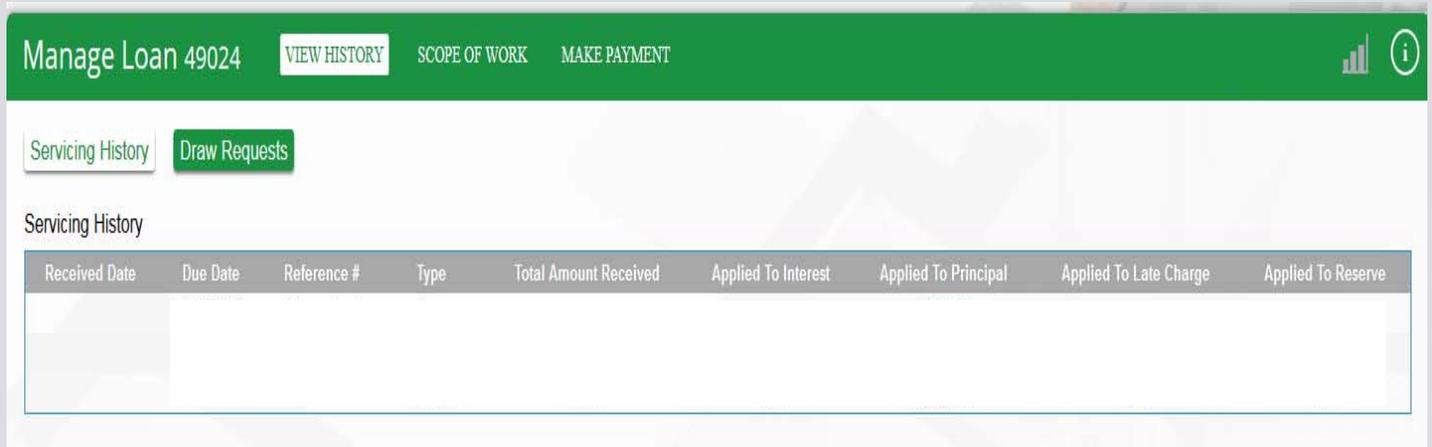
Loan Calculator		Loan Results	
<b>Property Values</b>		<b>Expenditures</b>	
Purchase Price <input type="text"/>	Rehab Cost <input type="text"/>	Closing Costs <input type="text"/>	Total Amount Out of Pocket <input type="text"/>
After Repair Value <input type="text"/>			
<b>Fees</b>		<b>Pricing</b>	
Property Tax in Escrow <input type="text"/>	Applicant Fee <input type="text"/>	Total Interest % <input type="text"/>	Total Points % <input type="text"/>
Processing Fee <input type="text"/>	Wiring Fee <input type="text"/>	Broker Points % <input type="text"/>	Loan Term (Months) <input type="text"/>
Underwriting Fee <input type="text"/>	Legal Fee <input type="text"/>	<input type="button" value="Calculate"/>	
		<b>Loan Results</b>	
		Loan Amount: \$0.00	
		Loan Amount After Net: \$0.00	
		Loan To Value: 0.00%	
		Total Interest: \$0.00	
		Total Points: \$0.00	
		Total Broker Points: \$0.00	
		Per Diem: \$0.00	
		Total Broker Points 2: \$0.00	
		Total Closing Costs: \$0.00	

The Loan Calculator is a future enhancement and is currently not ready for use. Please disregard.



### Manage Loan

View and Manage Loan



Manage Loan 49024 [VIEW HISTORY](#) [SCOPE OF WORK](#) [MAKE PAYMENT](#)  

[Servicing History](#) [Draw Requests](#)

Servicing History

Received Date	Due Date	Reference #	Type	Total Amount Received	Applied To Interest	Applied To Principal	Applied To Late Charge	Applied To Reserve
---------------	----------	-------------	------	-----------------------	---------------------	----------------------	------------------------	--------------------

The “Manage Loan” icon will bring you to a page to view the loan’s servicing history, view or enter the scope of work, make a draw request, or make a payment.



### Needs List

Upload all required documents.

### Needs List

[Go to Catalyst Full App](#)

[Go to My Loans](#)

[Detailed App](#)

**Summary :**

**Financial :**

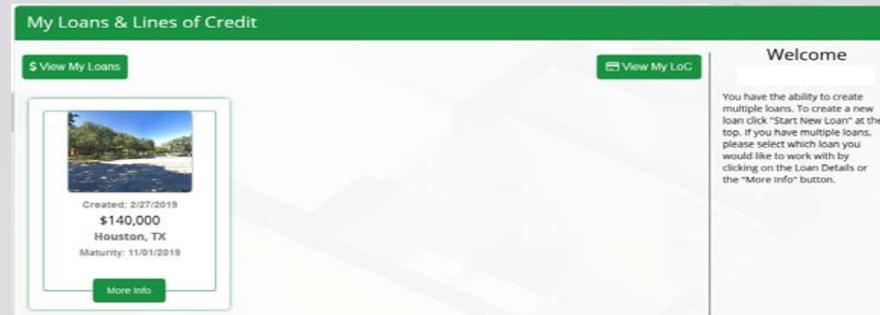
**Property :**

The "Needs List" icon will bring you to a page that will list out any items that are still needed to process your loan.



**My Loans**

View and navigate to any of your loans.

A screenshot of a web dashboard titled "My Loans & Lines of Credit". The dashboard has a green header bar. Below the header, there are two buttons: "\$ View My Loans" and "View My LoC". The main content area features a card with a landscape image of a lake and trees. Below the image, the text reads: "Created: 2/27/2019", "\$140,000", "Houston, TX", and "Maturity: 11/01/2019". At the bottom of the card is a "More Info" button. To the right of the card is a "Welcome" section with a paragraph of text: "You have the ability to create multiple loans. To create a new loan click 'Start New Loan' at the top. If you have multiple loans, please select which loan you would like to work with by clicking on the Loan Details or the 'More Info' button."

The "My Loans" icon will bring you back to the original landing page from when you initially logged into the borrower portal.