
How To “Forward” Lock

Cardinal Financial Company - Wholesale

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Instructions

Add Loan

- Upload 3.2 File using the “Add Loan” feature on the home screen
 - Make sure your compensation Type is Accurate

Provide Estimated Score

- Navigate to the Credit Screen and put in an Estimated Score
 - Use the middle of the 3 credit scores from your credit report

Get Rates

- Navigate to the Terms screen - Click “Get Rates”

Obtain Products

- Select the products you want to view
 - Check and uncheck boxes to look at the specified products

Choose Rate and Term

- Select the rate and term discussed with the borrower - Click “Choose Selected”

Lock

- Once back to the main terms screen, Click “Lock” to lock loan.
 - A lock confirmation will be emailed to you.

References

Reference List
Octane

Revision History

Date	Description	Approver
10.5.2020	Revised	Nyreen Huyser
11.30.2020	Revised	Stephanie Simon
3.4.2021	Revised	Timothy Williams