

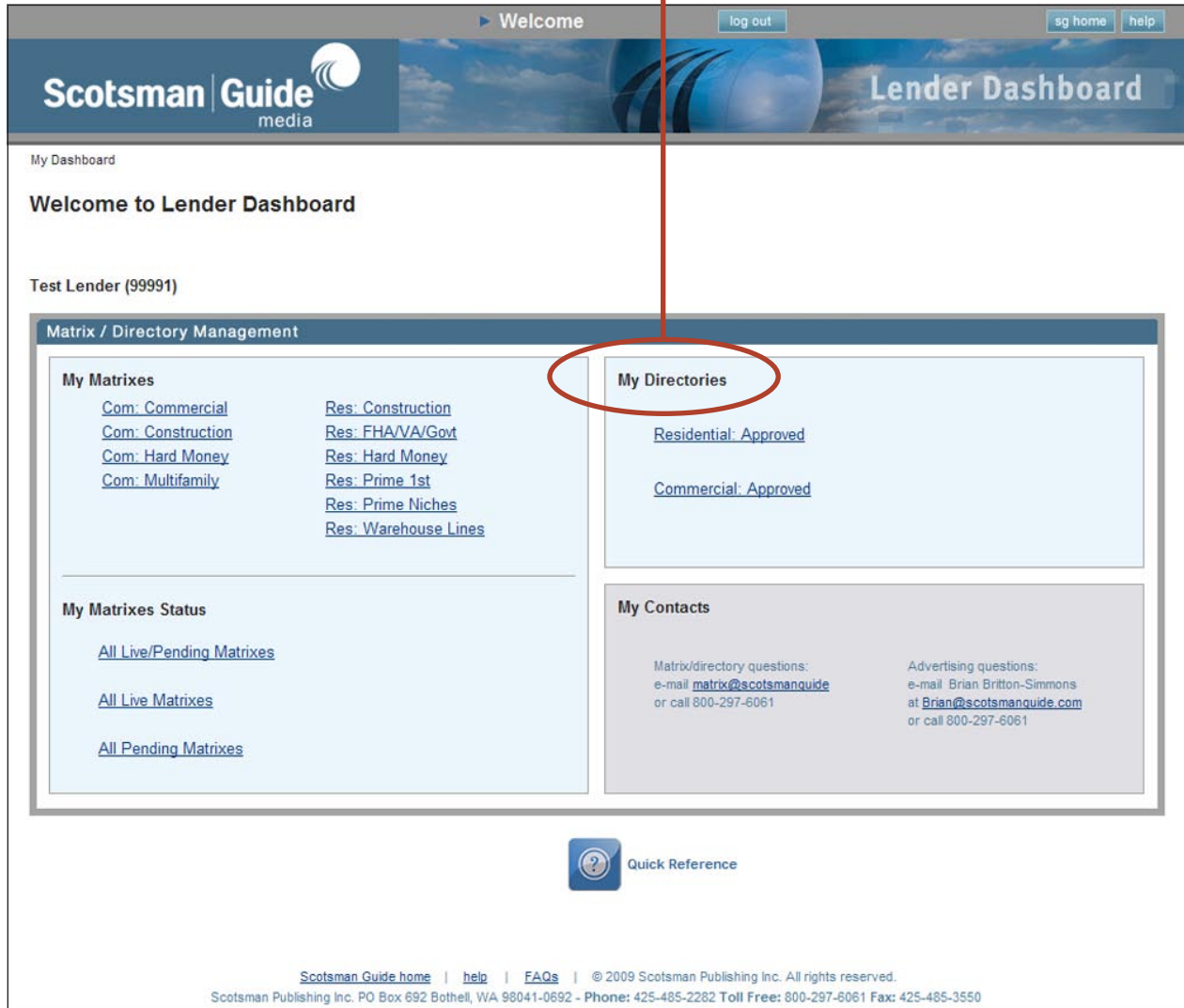
Lender Dashboard Quick Start Training

1. Log onto Lender Dashboard at scotsmanguide.com/lenderdashboard.

Note: Your username and password may be different from those used for *Scotsman Guide* Loan Post and other parts of scotsmanguide.com.

2. On Lender Dashboard, you can see your matrix(es), Lender Directory items and their statuses.

A good rule of thumb is to update your Directory listing first.



3. Update your Lender Directory information and contacts.

Note: Comments are limited to 150 characters — or 300 characters, if you are paying for a logo. Contacts are limited to 17 lines for the residential Lender Directory and three lines for the commercial Lender Directory. To purchase more space for comments or contacts, contact your account executive.

Lender Dashboard Quick Start Training

To save your work in progress, click the **“Draft”** button. When you’re finished, click the **“Submit”** button, which sends your information to *Scotsman Guide*. *Note:* We will not review your information until you have clicked Submit.

You will receive a confirmation e-mail from matrix@scotsmanguide.com once we have received your information. Please ensure that your spam filters classify “matrix@scotsmanguide.com” as a trusted sender.

Welcome [log out](#) [sg home](#) [help](#)

Scotsman Guide media **Lender Dashboard**

[My Dashboard](#) > [Edit Directory](#) [Preview](#)

Live Edit Edition Residential

Directory Format Template 3 [Example \[pdf\]](#) Option 1 E-Mail Option 2 Cell Publication Date: Jan 10

Lender Name Phone Fax

Address E-Mail

City State WA Postal Code Web URL

Comments

Directory Logo [Browse...](#) [Upload](#) [View Logo specifications \[pdf\]](#)

Select a row to use these function(s) [Add](#) [Delete](#) [Up](#) [Down](#) [Quick Reference](#)

Area	Contact	Title	Extension	E-Mail	Cell	Phone
NY, NJ, PA	Amy Jones	Sales				718-555-1212
Nationwide	Scott Sampson	Sales Manager				425-984-6031

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4. To update your matrix(es), click “My Dashboard” and select the appropriate matrix under “My Matrixes.”

Welcome

log out

sg home help

Scotsman | Guide
media

Lender Dashboard

My Dashboard

Welcome to Lender Dashboard

Test Lender (99991)

Matrix / Directory Management

My Matrixes

[Com: Commercial](#) [Res: Construction](#)
[Com: Construction](#) [Res: FHA/VA/Govt](#)
[Com: Hard Money](#) [Res: Hard Money](#)
[Com: Multifamily](#) [Res: Prime 1st](#)
 [Res: Prime Niches](#)
 [Res: Warehouse Lines](#)

My Directories

[Residential: Approved](#)

[Commercial: Approved](#)

My Matrixes Status

[All Live/Pending Matrixes](#)

[All Live Matrixes](#)

[All Pending Matrixes](#)

My Contacts

Matrix/directory questions:
e-mail matrix@scotsmanguide.com
or call 800-297-6061

Advertising questions:
e-mail Brian Britton-Simmons
at Brian@scotsmanguide.com
or call 800-297-6061

Quick Reference

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5. Start by updating your Online matrix data — and note that all users now have two versions of their matrixes:

1. The Online version, which is used to update lender search engines on scotsmanguide.com; and
2. The Print version, which is used to update the matrixes in the *Scotsman Guide* print publication.

These versions can have different data or be identical. *Note:* Because the Online data is updated much faster (5 to 7 days from when you submit) than the print data (which is published about 1.5 months later), we suggest that you use the Online version for data that changes more frequently and the Print version for more-stable data that is not likely to change.

We recommend that you update the information in the Online version first and then use the pop-up (described in Step 6) to submit your data for the Print version as well.

The screenshot displays the Scotsman Guide Lender Dashboard. At the top, there is a navigation bar with 'Welcome', 'log out', 'sg home', and 'help'. Below this, the 'Matrix Status' section shows a dropdown menu for 'Res: Prime 1st'. To the right, there are radio buttons for 'Online' and 'Print', with 'Online' selected. Below these are buttons for 'Draft', 'Submit', and 'Cancel', which are circled in red. The main content area includes a 'General Note' field with 'New Test1', a state selection grid with checkboxes for various states (AK, AL, AR, AZ, CA, CO, CT, DC, DE, FL, GA, HI, IA, IL, IN, KS, KY, LA, MA, MD, ME, MI, MN, MO, MS, MT, NC, ND, NE, NH, NJ, NM, NV, NY, OH, OK, OR, PA, RI, SC, SD, TN, TX, UT, VA, VT, WA, WI, WV, WY), and a table with columns for 'Mod Date', 'Ln No', 'Status', 'Program', 'Doc Type', '4506', 'Occ', 'Pur', '# Units', 'FICO1', '% LTV SK', '% LTV SK', '% LTV SK', 'FICO2', and '%'. The table contains five rows of data. At the bottom, there is a 'Quick Reference' section and a 'Message' field with a 'Send' button.

To start, click “**Edit**”. To save your work in progress, click the “**Draft**” button. When you’re finished, click the “**Submit**” button, which sends your information to *Scotsman Guide*. *Note:* We will not review your information until you have clicked “**Submit**”.

You will receive a confirmation e-mail from matrix@scotsmanguide.com once we have received your information. Please ensure that your spam filters classify “matrix@scotsmanguide.com” as a trusted sender.

6. After you have clicked the “Submit” button a message will pop-up on the screen asking if you would like to submit your data for the Online and Print versions or the Online version only.

Click “Yes” if you want to submit your data for both the Online and Print versions

Click “No” if you want to submit your data for the Online version only.

The screenshot shows the Scotsman Guide Lender Dashboard interface. A dialog box titled "Confirm Copy Matrix -- Webpage Dialog" is open, asking the user: "Do you also want to submit this data for your Print version." The dialog includes a note: "Note: This will overwrite all your data in the Print version." It also explains that Scotsman Guide advertisers have two versions of their matrices: an Online version (updated faster) and a Print version (updated 1.5 months ahead). The dialog concludes with: "Matrix information can be different in each version. As such, we recommend putting information that changes frequently in the online version and placing information that changes less frequently in the print version." At the bottom of the dialog, there are two buttons: "Yes" and "No". The "Yes" button is circled in red. The background of the dashboard shows a matrix table with columns for Mod Date, Ln No, Status, Program, Doc Type, 4506, and Occ. The table contains five rows of data, with the last three rows having a red background for the Doc Type column.

Mod Date	Ln No	Status	Program	Doc Type	4506	Occ
11/02/2009	1	Approved	Test1	Full	Y	OVN
11/02/2009	2	Approved	Test2	Full		V
11/17/2009	3	Pending Approval	Test3	SIVA	Y	OVN
11/17/2009	4	Pending Approval	Test4	SIVA	Y	O
11/17/2009	5	Pending Approval	Mercury	SIVA	Y	O

7. If you have submitted your data for both the Online and Print versions and don't want to make any further changes, skip to step 8.

If you have submitted your data and want to make changes to your Print version (i.e. have different information appearing in Print than you do for Online), then click on the **“Print”** button and then the **“Edit”** button. Once you are in editing mode, edit your data as you did in the Online version and then click **“Submit”** when you are finished. After submitting your information, you will receive another confirmation e-mail from matrix@scotsmanguide.com.

8. Repeat steps 4-6 if you have listings in more than one matrix. You will receive a confirmation e-mail from matrix@scotsmanguide.com for each Online or Print version you submit.

9. After you have submitted all of your data, the Scotsman Guide Matrix Department will review your submissions and change or approve your data. Note: We do require you to approve or reject all changes and submit that data for approval again. Only approved data will appear on scotsmanguide.com and in our print editions.

You will receive a confirmation e-mail from matrix@scotsmanguide.com for each set of Matrix data that you submit. Your listing will be updated on scotsmanguide.com in 5 to 7 days and/or will appear in the next scheduled print publication. Questions? E-mail matrix@scotsmanguide.com or call (800) 297-6061.