



CoStar for Lenders

Portfolio Import User Guide

July 2024



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Section 1: Imports Permission

Permission to run imports is provisioned through a built-in Importers team. To add users to this team, a user with Administrator or Manage Security product access can follow these steps:

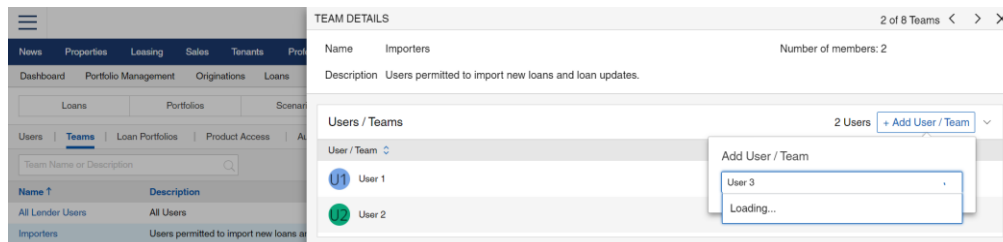


Figure 1: Adding users to the Importers team through Admin → Security → Teams

1. Navigate to Admin → Security → Teams tab.
2. Click on the Importers team.
3. Click **+ Add User / Team** to search for and add users or teams to the Importers team.

Users can also be added to the Importers team from the Admin → Security → Users tab:

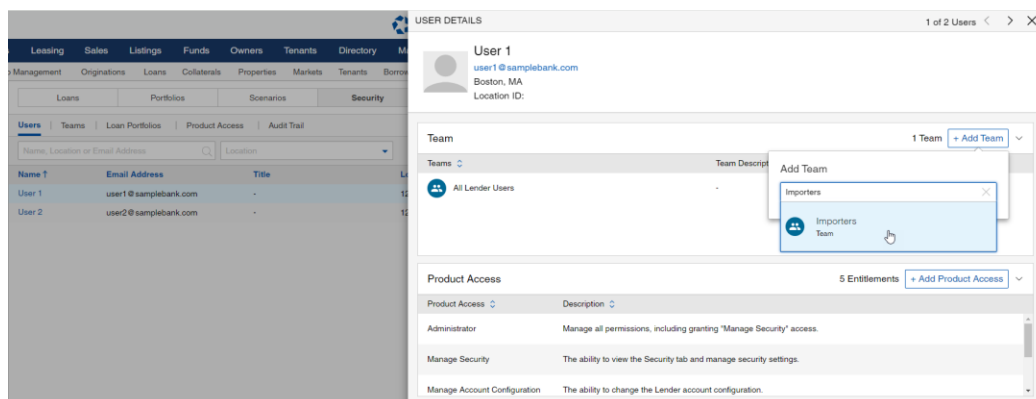


Figure 2: Adding users to the Importers team through Admin → Security → Users

1. Navigate to Admin → Security → Users tab.
2. Click on the user you want to add to the Importers team.
3. Click **+ Add Team** to search for and add this user to the Importers team.

Users added to this team are granted Imports, Add Loan, Manage Portfolios, and Manage Portfolio Composition product access. Users on this team are also granted edit access to all loans.

Section 2: Import New Loans

2.1 New Loans Input Template

The New Loans Input Template contains all the inputs you need to import your loans into Lender. To download the New Loans Input Template:

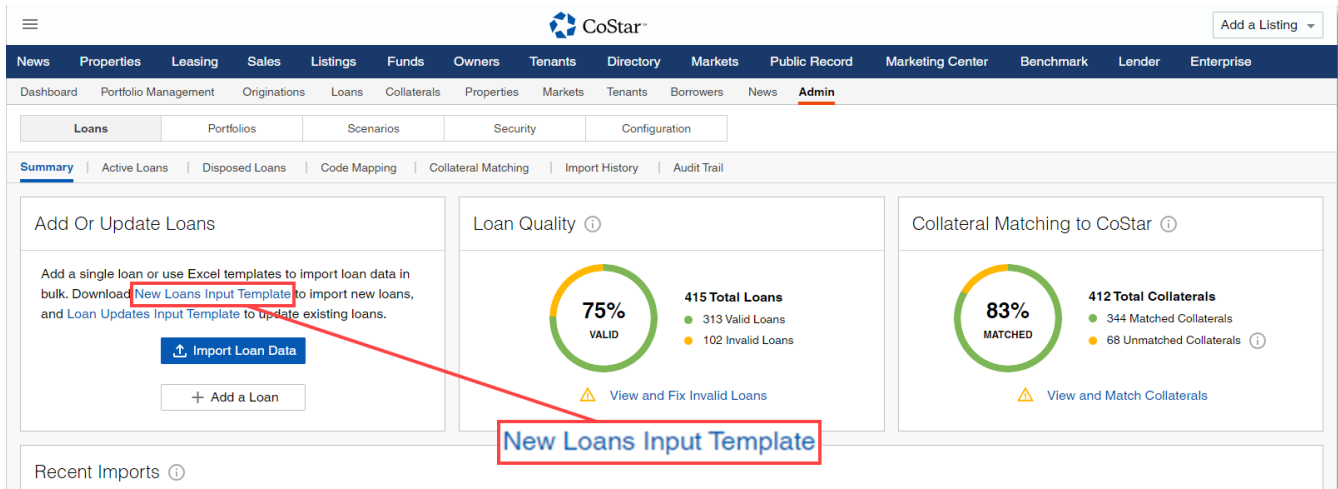


Figure 3: Click the New Loans Input Template hyperlink to download the template file.

1. Navigate to Admin → Loans → Summary tab.
2. Under the “Add or Update Loans” card, click on the [New Loans Input Template](#) hyperlink to download the template file.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O	P	Q	R	S
1	PortfolioName	LoanID	LoanName	LoanType	Memo	OrigDate	OrigTotalLoanAmt	OrigAmortPeriod	OrigMaturityTerm	OrigInterestOnlyTerm	PrepayAdj	OrigLockoutMos	OrigYMMos	OrigPremiumMos	DayCountConvention	OrigRiskRating	OrigBorrowerRating	CurrentDate	CurrentTotalLoanAmt
2																			
3																			
4																			
5																			
6																			
7																			
8																			
9																			
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37																			

Figure 4: An empty New Loans Input Template

Column headers highlighted in **blue** are required and must contain data for all loans of any type. Column headers highlighted **orange** are only required under certain conditions (e.g., fields that are unique to construction loans, etc.). Unhighlighted tabs and column headers are optional. Inputs are required for every loan in the four tabs highlighted blue, while unhighlighted tabs only contain optional fields.

When entering data into each field, inputs should match the format listed in the data dictionary. Percentages should be entered as decimal values (e.g., enter 3% as 0.03). Dates should be formatted as MM/DD/YYYY. For any Value Table data fields, enter the values exactly as they appear in the data dictionary.

For any values that differ from the data dictionary, you will be prompted to provide code mappings during import if they haven't already been configured (see [Section 4.2](#) for more details).

You will be notified during the import process if any errors are detected. Loans with non-critical errors can either be imported into Lender or moved into a separate Unimported Loans File where errors can be corrected in Excel and the loans can be imported into Lender (see [Section 2.4](#) for more details). Critical error loans (i.e., any loan with missing or invalid data in the LoanID, LoanName, LoanType, Collateral ID, or any servicing-related field) cannot be imported. These loans must be corrected then imported from the Unimported Loans File.

2.2 Import New Loans

To import new loans into Lender:

1. On the Admin → Loans → Summary page, click the [New Loans Input Template](#) hyperlink to download the template (see [Section 2.1](#) for instructions and details on the template file).
2. Enter your data into the New Loans Input Template.
3. (Optional) If the data contain codes that Lender doesn't recognize, code mappings may be set up prior to import via the Admin → Loans → Code Mapping tab (see [Section 4.1](#) for instructions).
 - a. Otherwise, code mapping will be prompted during the import process.
4. On the Admin → Loans → Summary page, click the **Import Loan Data** button.

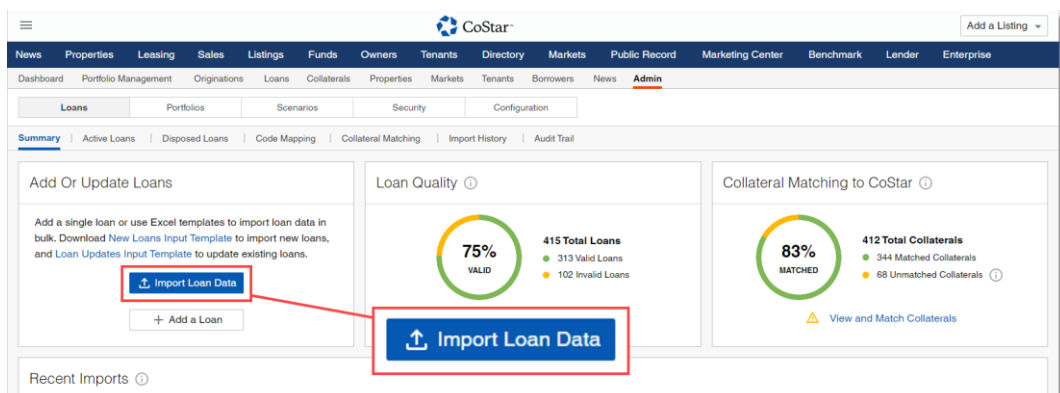


Figure 5: Click the Import Loan Data button to open a dialogue where you can select the file you want to import.

5. Select the **Import New Loans** radio button.

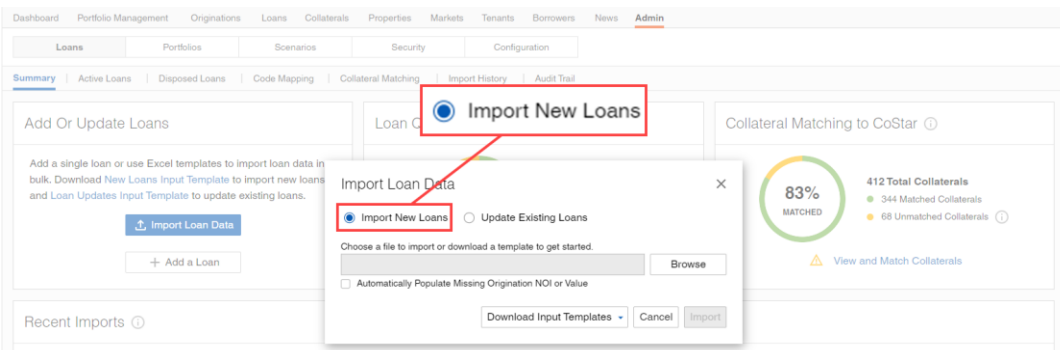


Figure 6: Select the Import New Loans radio button to specify the import type.

6. Click **Browse** and locate the template file you want to import.

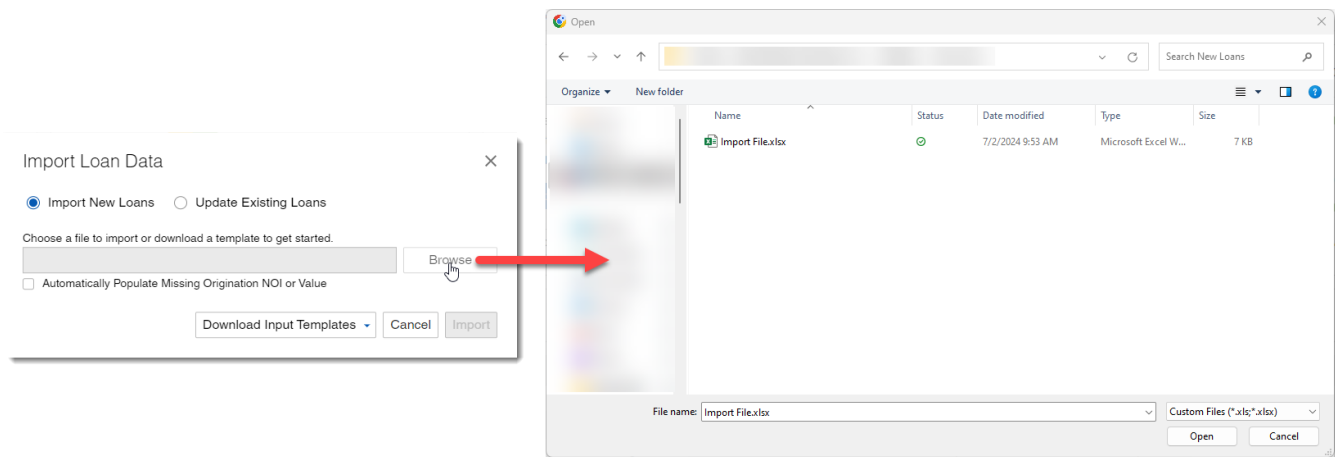


Figure 7: Clicking the **Browse** button opens the file manager where you can locate and select your import file.

7. (Optional) If any loans are missing Origination NOI or Value data, check the **Automatically Populate Missing Origination NOI or Value** box to populate missing fields using CoStar cap rate data.

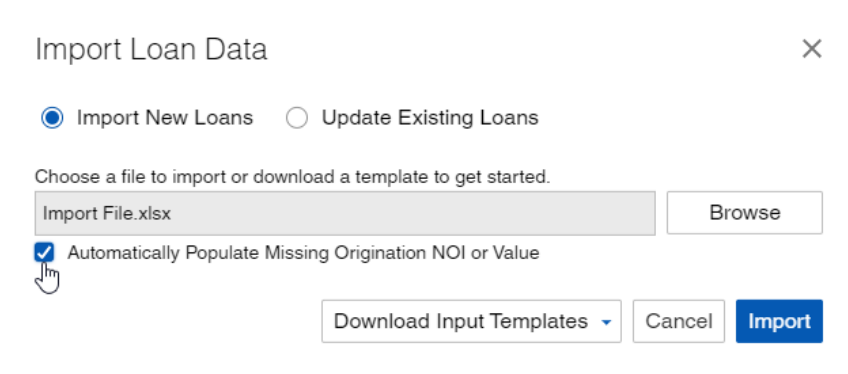


Figure 8: Check the box to populate missing OrigNOI and OrigValue fields with Lender cap rate data.

8. Click **Import** to begin the import process.

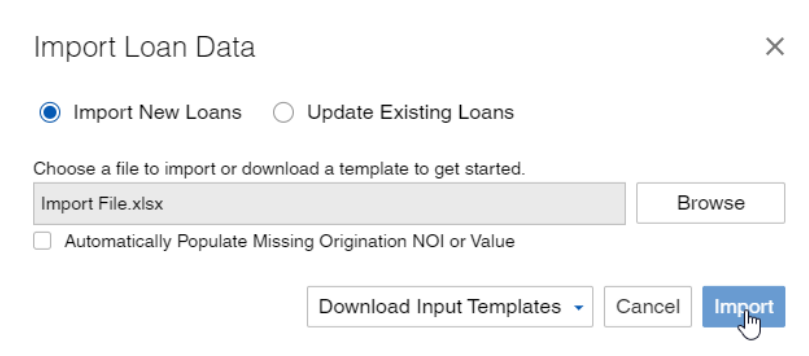


Figure 9: Click the **Import** button to begin the import process.

9. If you are prompted to provide code mappings, select the corresponding CoStar Input Value for each Unknown Input Value to proceed with the import process.
 - a. If you don't have time to provide all code mappings, you may cancel the import and download a file of your unknown input values (see [Section 4.2](#) for more details).

Code Mapping
✕

6 Unknown Input Values cannot be recognized by CoStar Lender.
 Please map them to CoStar Input Values. To stop the import process, click "Cancel Import".
 Once all the unknown inputs are successfully mapped, click "Continue" to proceed.

Input Field Name	User Input Value	CoStar Input Value
MostRecentBorrowerRating	SUPERB	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;">Select ▾</div>
MostRecentBorrowerRating	VERY GOOD	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;">Select ▾</div>
MostRecentTenantRating	ACCEPTABLE	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;">Select ▾</div>
MostRecentTenantRating	SATISFACTORY	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;">Select ▾</div>
PropertyType	APARTMENTS	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;">Select ▾</div>
PropertyType	HOTELS	<div style="border: 1px solid #ccc; padding: 2px; display: flex; align-items: center;">Select ▾</div>

Cancel Import

Continue

Figure 10: Dialogue shown when prompted for Code Mapping during a new loan import. CoStar Input Values must be selected for all rows before the Continue button enables to allow proceeding with import.

10. Wait for loan processing to complete. You may leave the Summary page while this occurs.
11. If your file contains any errors, you will be presented with a banner showing a summary of the loans imported into the account and loans with critical or non-critical errors. You have two options for handling loans with non-critical errors. Review the options, select the radio button next to your preferred option, and click **Continue** to proceed with the import.

Recent Imports ⓘ

Status: User Guide Test Import.xlsx - Processing Loans - 80%

Summary	This file contains: <ul style="list-style-type: none"> 9 Valid Loans: Successfully imported. 2 Loans with Critical Errors: Not imported. Errors can be reviewed and fixed in the Unimported Loans File. 4 Loans with Non-Critical Errors: Choose a preferred action below.
Action Required	Select an option to continue import: <div style="margin-top: 5px;"> <input checked="" type="radio"/> Do not import loans with non-critical errors. An Unimported Loans File containing critical and non-critical errors will be generated at the end of the import process. </div> <div style="margin-top: 5px;"> <input type="radio"/> Import loans with non-critical errors. CoStar data and analytics will not be available for these loans until the errors are corrected in the system. </div> <div style="text-align: right; margin-top: 10px;"> <div style="border: 1px solid #007bff; padding: 5px 15px; background-color: #007bff; color: white;">Continue</div> </div>

Figure 11: Banner showing a summary of the import and options for importing or not importing non-critical error loans. Review the options, make a selection, then click the Continue button to proceed with the import.

- a. **Do not import loans with non-critical errors:** Selecting this option does not import loans with non-critical errors. You will be provided with an Excel file at the end of the import process—the Unimported Loans File—containing each loan with critical and non-critical errors, highlighted to show which cells contain errors (see [Section 2.4](#) for more details).
 - i. This option is recommended, as this file shows all the loan errors in one place and allows import of the error loans once errors have been corrected.
 - b. **Import loans with non-critical errors:** Selecting this option imports all loans with non-critical errors. You may correct errors with these loans from the Lender form pages (see [Section 2.3](#) for more details).
 - i. This will only import loans with non-critical errors. Critical error loans cannot be imported.
12. Once the import is complete, you will be shown an **Import Processed** dialogue with the number of loans imported and unimported.
- a. Clicking **Finish** will download the Unimported Loans File. You may uncheck the box to opt out of downloading the file if you prefer to download it later.
 - i. The Unimported Loans File can be downloaded at any time from the Recent Imports or Import History tables (see [Section 5.4](#) for details on the Recent Imports table or [Section 6](#) for details on the Import History table).
 - b. If there are loans with errors, the number of unimported loans includes loans with non-critical errors (if they were chosen not to be imported) and critical error loans.

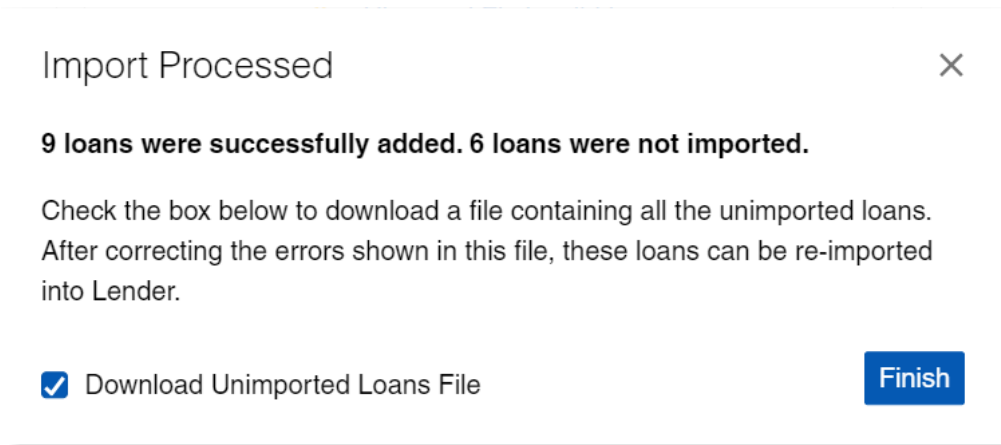


Figure 12: The Import Processed dialogue, indicating 9 imported and 6 unimported loans. Checking the box downloads the Unimported Loans File after clicking the Finish button.

2.3 Correct Non-Critical Error Loans

If you chose to import non-critical error loans during the import process, errors can be corrected in the Loan Origination form. To access the Loan Origination form:

1. Navigate to Admin → Loans → Active Loans tab.

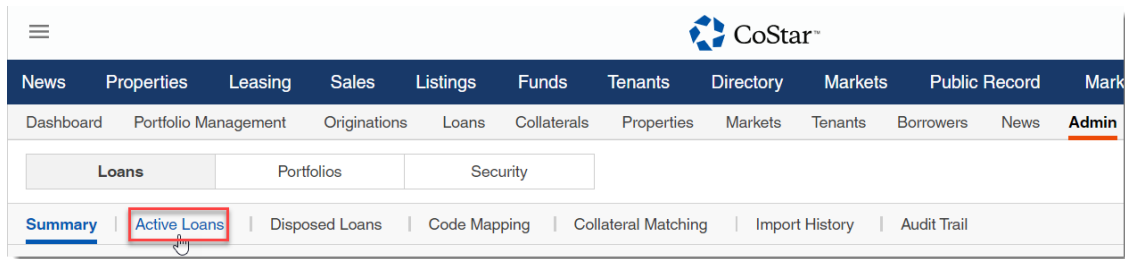


Figure 13: Click on the Active Loans tab to view all the loans in your account.

2. Locate and click on the loan containing errors you want to correct.

Loan Name Collateral Address	Loan ID	Collateral ID	Loan Type	Loan Status	Calculation Results	Data Age (Mos)	Origination Date	Balance ↓	NOI	DSCR
1523 Second Ave	1523 Second Ave	Test Collateral 5...	Permanent	-	Error	43	12/21/2020	-	-	-

Figure 14: The Admin → Loans → Active Loans table, showing a loan with errors.

3. Click on the origination date of the loan in the Loan History table.

Period	Loan Status	Balance	NOI	DSCR	Value	LTV	Valuation Method	Debt Yield	Cap Rate	Interest Rate	True Borrower Rating
7/31/2024	-	-	-	-	-	-	-	-	-	-	-
6/30/2024	-	-	-	-	-	-	-	-	-	-	-
5/31/2024	-	-	-	-	-	-	-	-	-	-	-
4/30/2024	-	-	-	-	-	-	-	-	-	-	-
3/31/2024	-	-	-	-	-	-	-	-	-	-	-
2/29/2024	-	-	-	-	-	-	-	-	-	-	-
1/31/2024	-	-	-	-	-	-	-	-	-	-	-
12/31/2023	-	-	-	-	-	-	-	-	-	-	-
11/30/2023	-	-	-	-	-	-	-	-	-	-	-
10/31/2023	-	-	-	-	-	-	-	-	-	-	-
12/21/2020	-	-	-	-	-	-	-	-	-	-	-

Figure 15: The Loan History table, highlighted to show the link to access the Loan Origination form.

4. Open the Loan Origination form and refer to the card on the right for a list of errors with the loan.

Figure 16: The Loan Origination form, with errors highlighted in the Maturity (Mos), Rate Reset Frequency (Mos), and Ceiling (%) fields.

5. In the Collateral Information card, click “Edit” next to any collateral to open the Collateral Information form and refer to the card on the right for a list of errors with the collateral.

The screenshot shows the Loan Origination system interface. The left sidebar contains a menu with the following items: Loan Information, Origination Loan Terms, Interest Rate, Loan Limits, Prepayment Terms, Risk Rating, True Borrower, Stakeholders, **Participation**, and Collateral Information. The main content area is divided into three sections: Stakeholder Type, Participation, and Collateral Information. The Collateral Information section shows a validation failed message and a list of collateral items. A red arrow points from the 'Edit' button next to the 'Test Collateral 29161' entry to the Collateral Information form.

Collateral Information Card:

- Stakeholder Type: Select Stakeholder Type
- Stakeholder Name: Search/Add Stakeholder Name
- Add Stakeholder (+)
- Participation:

Participant	Participation (%)	Participation (\$)
	100.00%	\$10,274,938.00
- Collateral Information:
 - Validation failed
 - Test Collateral 29161
 - Collateral ID: Test Collateral 29161
 - 200 N Sacramento St, CA 95240, Retail
 - 0 CoStar Properties
 - Collateral Errors Found: Edit the highlighted collaterals to correct.
 - Add Collateral (+)

Collateral Information Form:

- CoStar Property Matches
- Collateral Details (i)
- Collateral Financials (i)
- Map of Mexico showing the location of the collateral.
- Collateral Details:
 - Collateral ID*: Test Collateral 29161
 - Collateral Name: Test Collateral 29161
 - Property Type*: Retail
 - Collateral Address*: 200 N Sacramento St
 - City*: Enter City
 - State*: CA
 - ZIP Code*: 95240
- Collateral Financials:
 - Origination NOI*: -\$243,849.00
 - Configured Action*: Enter Origination NOI and Origin...
 - Cap Rate (Implied):
 - Origination Value*: Enter Value
 - Origination Balance*: \$10,274,938.00
 - Allocation %: 100%
 - Tenant Rating: Excellent
- Errors:
 - Cap Rate cannot be blank.
 - City is required.
 - Origination NOI cannot be negative.
 - Origination Value cannot be blank.

Figure 17: Click the Edit button next to a given collateral to access the Collateral Information form, where address and financials data can be modified.

2.4 Unimported Loans File

	A	B	C	D	E	F	G	H	I	J	K	L
1	PortfolioName	LoanID	LoanName	LoanType	Memo	OrigDate	OrigTotalLoanAmt	OrigAmortPeriod	OrigMaturityTerm	OrigInterestOnlyTerm	PrepayAdj	Orig
2		Sample Loan 1	Sample Loan 1	Construction		11/20/2022			353			
3		Sample Loan 2	Sample Loan 2	Construction		12/31/2021			218			
4		Sample Loan 3	Sample Loan 3	Construction		7/12/2023			272			
5		Sample Loan 4	Sample Loan 4	Construction		12/6/2014			345			
6		Sample Loan 5	Sample Loan 5	Construction		3/26/2023			329			
7		Sample Loan 6	Sample Loan 6	Construction		5/2/2017			266			
8		Sample Loan 7	Sample Loan 7	Construction		8/29/2021						
9		Sample Loan 8	Sample Loan 8	Construction		4/6/2016			204			
10		Sample Loan 9	Sample Loan 9	Construction		5/2/2008			217			
11		Sample Loan 10	Sample Loan 10	Construction		12/15/2019			132			
12		Sample Loan 11	Sample Loan 11	Permanent		12/24/2021			21	OrigAmortPeriod cannot be missing for permanent loan types.		
13		Sample Loan 12	Sample Loan 12	Construction		8/9/2020			305			
14		Sample Loan 13	Sample Loan 13	Construction		12/27/2021			194			
15		Sample Loan 14	Sample Loan 14	Construction		12/13/2021						
16		Sample Loan 15	Sample Loan 15	Construction		5/10/2020			122			
17		Sample Loan 16	Sample Loan 16	Construction		6/3/2017			323			
18		Sample Loan 17	Sample Loan 17	Construction		5/9/2024			219			
19												
20												
21												
22												
23												
24												
25												
26												
27												
28												
29												
30												
31												
32												
33												
34												

Figure 18: Errors highlighted in the Unimported Loans File. Critical errors are in dark red, non-critical errors are in light red. Error messages are shown when hovering over a highlighted cell.

The Unimported Loans File shows loans that were not imported either because they contain critical errors or non-critical errors that the importer opted not to import. Imported loans are not populated into this file. To access this file:

1. Navigate to Admin → Loans → Summary page.
2. In the Recent Imports table, locate the record for the import you completed.
 - a. If you cannot find your import, click **View More »**, or click on the **Import History** tab to view the complete history of imports into the account.
3. Click the download link under the Unimported Loans column to download the Unimported Loans File.

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Audit Trail

Add Or Update Loans

Add a single loan or use Excel templates to import loan data in bulk. Download [New Loans Input Template](#) to import new loans, and [Loan Updates Input Template](#) to update existing loans.

Import Loan Data

Add a Loan

Loan Quality

75%
VALID

419 Total Loans

317 Valid Loans

102 Invalid Loans

View and Fix Invalid Loans

Collateral Matching to CoStar

83%
MATCHED

416 Total Collaterals

348 Matched Collaterals

68 Unmatched Collaterals

View and Match Collaterals

Recent Imports

Timestamp	Filename	User	Type	Status	Total Loans	Unimported Loans	Imported Loans
7/2/2024 - 8:59:53 AM	New Loan File 1.xlsx	Sample User 1	Import New Loans	Complete	81	0	81
7/2/2024 - 8:30:55 AM	New Loan File 2.xlsx	Sample User 2	Import New Loans	Complete	85	0	85
6/26/2024 - 1:39:11 PM	Loan Update File 1.xlsx	Sample User 1	Update Existing Loans	Complete	24	7	17
6/26/2024 - 1:15:51 PM	New Loan File 3.xlsx	Sample User 2	Import New Loans	Complete	80	31	49
6/25/2024 - 3:53:44 PM	Loan Update File 2.xlsx	Sample User 1	Update Existing Loans	Complete	52	19	33

View More

Figure 19: The Admin → Loans → Summary page. To download the unimported file, click the download link under the Unimported Loans column in the Recent Imports table. To download the file for an older import, click View More » to access the Import History table, which contains a complete history of imports into the account.

Cells with non-critical errors are highlighted light red. Cells with critical errors are highlighted in dark red. Hovering over any cell with errors shows a message explaining the error. Check every tab with data to ensure you correct all the identified errors. Once all errors have been corrected, this file can be imported into Lender.

Section 3: Update Existing Loans

3.1 Loan Updates Input Template

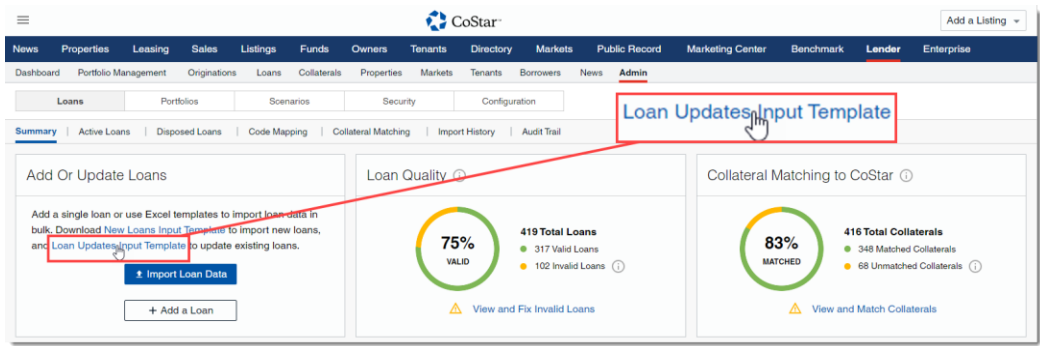


Figure 20: On the Admin → Loans → Summary page, click the Loan Updates Input Template link to download the template Excel file.

The screenshot shows an empty Excel spreadsheet titled 'Loan Updates Input Template'. The spreadsheet has columns A through I and rows 1 through 34. The first row (row 1) contains the following headers: 'LoanID' (blue), 'CollateralID' (orange), 'Date' (blue), 'Variable' (blue), and 'Value' (blue). The remaining rows are empty. The spreadsheet is displayed in a window with a 'Data Dictionary' tab and a 'Loan Updates' tab. The 'Loan Updates' tab is active.

Figure 21: An empty Loan Updates Input Template

The loan updates template contains all the inputs you need to update your loans in Lender. Column headers highlighted in blue are required and must contain data for all loans of any type. Column headers highlighted orange are only required under certain conditions (e.g., collateral-specific updates).

Unhighlighted tabs and column headers are optional. Inputs are required in the Loan Updates tab. Any loan being updated must have a Calculation Results status of Valid in the Admin → Loans → Active Loans tab. Updates cannot be made to loans with a Calculation Results status of Error or System Error.

To update a loan:

1. In the Loan Updates tab, under **LoanID**, enter the ID of the loan you're updating.
2. (Optional) If updating CollateralNOI, CollateralValue, or TenantRating, enter the ID of the collateral being updating under **CollateralID**.
3. Enter the **Date** on which the update applies (format: MM/DD/YYYY). This date cannot be earlier than one month after the loan's origination date or later than the loan's maturity month.
4. Enter the **Variable** that you're updating (refer to the Data Dictionary for a list of variables).
5. Enter the updated **Value** (refer to the Data Dictionary for constraints on each field).

To provide an updated construction drawdown schedule:

1. On the Loan Updates tab, add two updates on the same date: one for **RemMaturityTerm** and another for **TotalExpectedCost**.
2. On the Construction Cost Updates tab, add a row with the same **Loan ID** and **Date** as entered on the Loan Updates tab.
3. Provide updated costs for each month of the construction term:
 - a. If the drawdown schedule exceeds 36 months, click on **Month36** and drag the green square to the right to add more months.
 - b. The number of months should equal the longest RemMaturityTerm on any loan in the file with a drawdown schedule being updated.

3.2 Update Existing Loans

To update existing loans in Lender:

1. Enter your data into the Loan Updates template (see [Section 3.1](#) for instructions).

	A	B	C	D	E	F
	LoanID	CollateralID	Date	Variable	Value	
1	235 S Coltrane Rd		7/31/2024	TrueBorrowerRating	Excellent	
2	235 S Coltrane Rd		7/31/2024	RiskRating	A++	
3	235 S Coltrane Rd	Test Collateral 55480	7/31/2024	CollateralNOI	\$6,446,541	
4	235 S Coltrane Rd	Test Collateral 55480	7/31/2024	CollateralValue	\$96,567,418	
5	235 S Coltrane Rd	Test Collateral 55480	7/31/2024	TenantRating	Great	
6	235 S Coltrane Rd		7/31/2024	LoanStatus	Performing	
7	235 S Coltrane Rd		7/31/2024	Balance	\$65,000,000	
8	235 S Coltrane Rd		7/31/2024	BalanceUpdateType	T-UP CORRECT	
9	235 S Coltrane Rd		7/31/2024	RemAmortPeriod	250	
10	235 S Coltrane Rd		6/30/2024	TrueBorrowerRating	Outstanding	
11	235 S Coltrane Rd		6/30/2024	RiskRating	B-	
12	235 S Coltrane Rd	Test Collateral 55480	6/30/2024	CollateralNOI	\$6,490,759	
13	235 S Coltrane Rd	Test Collateral 55480	6/30/2024	CollateralValue	\$96,809,264	
14	235 S Coltrane Rd	Test Collateral 55480	6/30/2024	TenantRating	Fine	
15	235 S Coltrane Rd		6/30/2024	LoanStatus	Performing	
16	235 S Coltrane Rd		6/30/2024	Balance	\$70,000,000	
17	235 S Coltrane Rd		6/30/2024	BalanceUpdateType	T-UP CORRECT	
18	235 S Coltrane Rd		6/30/2024	RemAmortPeriod	260	
19	235 S Coltrane Rd		5/31/2024	TrueBorrowerRating	Good	
20	235 S Coltrane Rd		5/31/2024	RiskRating	B+	
21	235 S Coltrane Rd	Test Collateral 55480	5/31/2024	CollateralNOI	\$6,652,016	
22	235 S Coltrane Rd	Test Collateral 55480	5/31/2024	CollateralValue	\$96,681,124	
23	235 S Coltrane Rd	Test Collateral 55480	5/31/2024	TenantRating	Outstanding	
24	235 S Coltrane Rd		5/31/2024	LoanStatus	D30	
25	235 S Coltrane Rd		5/31/2024	Balance	\$74,000,000	
26	235 S Coltrane Rd		5/31/2024	BalanceUpdateType	DELINQ	
27	235 S Coltrane Rd		5/31/2024	RemAmortPeriod	270	
28	235 S Coltrane Rd					
29						
30						
31						
32						
33						
34						
35						
36						
37						

Figure 22: The Loan Updates Input Template, filled in to update three months of data for a given loan.

2. (Optional) If your data contain codes that Lender doesn't recognize, you may set up code mappings prior to import on the Admin → Loans → Code Mapping tab.
 - a. Otherwise, you will be prompted to provide these during the import process.
3. On the Admin → Loans → Summary page, click the **Import Loan Data** button.

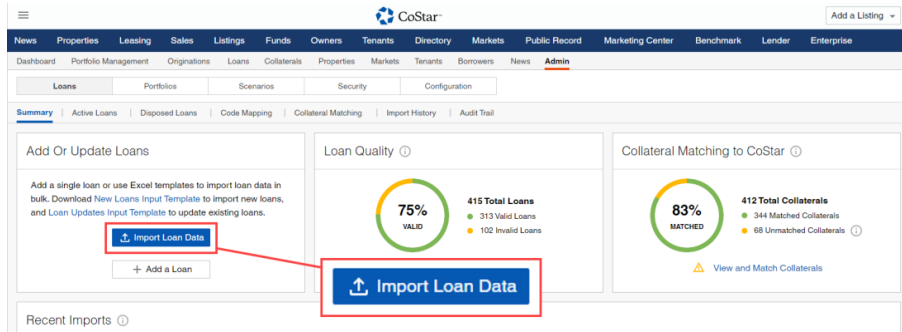


Figure 23: Click the **Import Loan Data** button to open a dialogue where you can select the file you want to import.

4. Select the **Update Existing Loans** radio button.

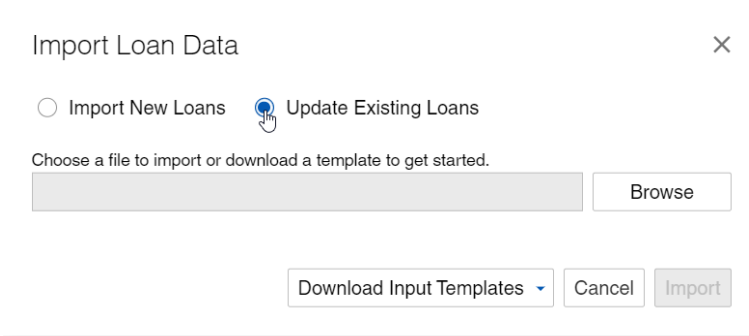


Figure 24: Select the **Update Existing Loans** radio button to specify the import type.

5. Click **Browse** and locate the file of loan updates you want to import.

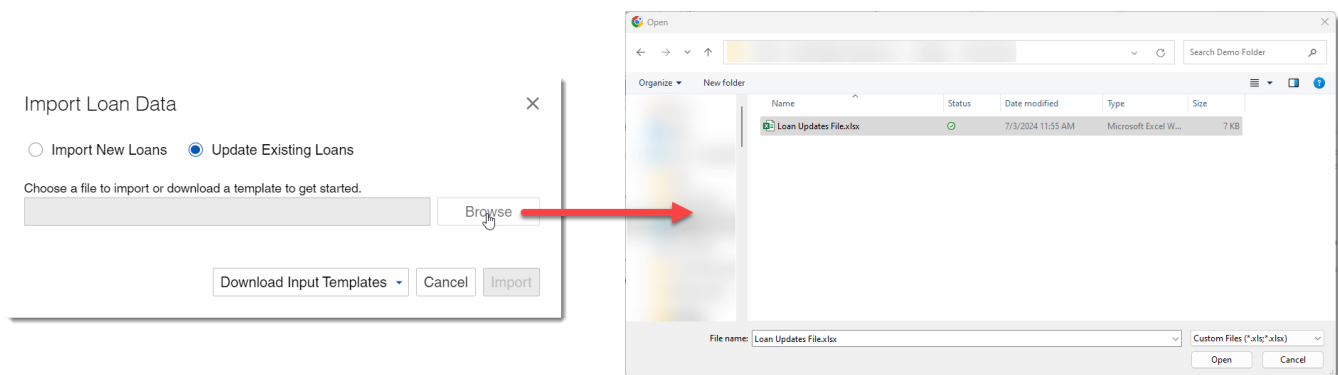


Figure 25: Clicking the **Browse** button opens the file manager where you can locate and select your import file.

6. Click **Import** to begin the import process.

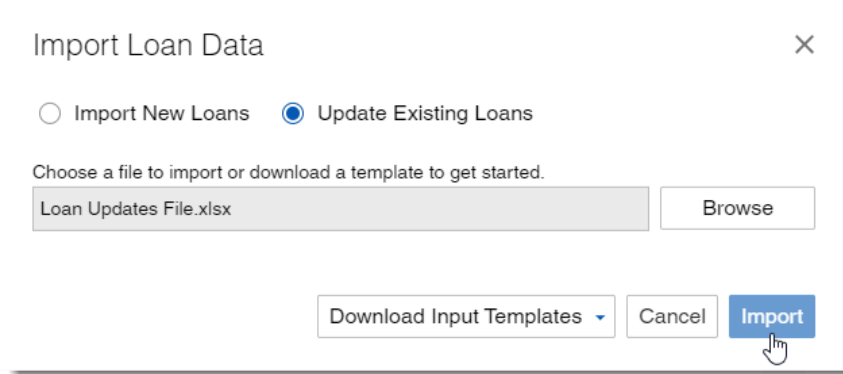


Figure 26: Clicking the Import button begins the import process

7. If you are prompted to provide code mappings, select the corresponding CoStar Input Value for each Unknown Input Value to proceed with the import process.
 - a. If you don't have time to provide all code mappings, you may cancel the import and download a file of your unknown input values (see [Section 4.2](#) for more details).

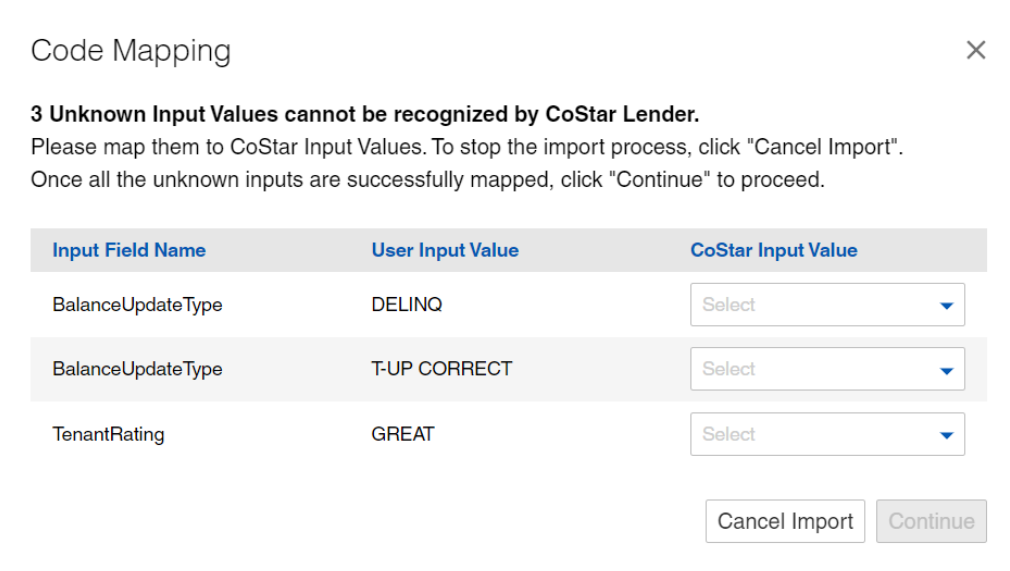


Figure 27: Dialogue shown when prompted for Code Mapping during a loan updates import

8. Wait for loan processing to complete. You may leave the Summary page while this occurs.
9. Once the import is complete, you will be shown an **Import Processed** dialogue with the number of loans that were updated and the number of loans that could not be updated, if there were any.
 - a. If any single update for a given Loan ID contained an invalid input, none of the updates for that loan were imported. Download the Unimported Loan Updates File to review errors.

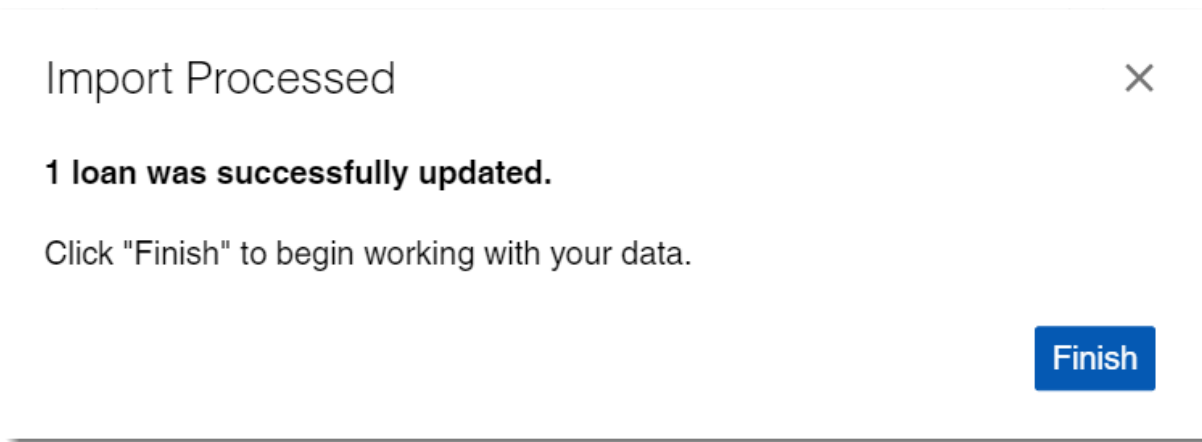


Figure 28: Import Processed dialogue, following a loan update import without any errors

3.3 Unimported Loan Updates File

LoanID	CollateralID	Date	Variable	Value
Sample Loan 1		05/31/2020	EquityDistributionMethod	Pari Passu
Sample Loan 1		06/30/2020	EquityDistributionMethod	Equity First
Sample Loan 2		04/30/2023	TrueBorrowerRating	Outstanding
Sample Loan 3		04/30/2023	LoanStatus	Performing
Sample Loan 4		04/30/2023	Balance	63000000
Sample Loan 5		04/30/2023	BalanceUpdateType	
Sample Loan 6	Test Collateral 59231	04/30/2023	TenantRating	Excellent
Sample Loan 7		05/31/2023	TrueBorrowerRating	D30
Sample Loan 8		05/31/2023	LoanStatus	58000000
Sample Loan 9		05/31/2023	Balance	Delinquency
Sample Loan 10		05/31/2023	BalanceUpdateType	Fine
Sample Loan 11	Test Collateral 59231	05/31/2023	TenantRating	Good
Sample Loan 12		06/30/2023	TrueBorrowerRating	D60
Sample Loan 13		06/30/2023	LoanStatus	53000000
Sample Loan 14		06/30/2023	Balance	Additional Pay Down
Sample Loan 15		06/30/2023	BalanceUpdateType	Good
Sample Loan 16	Test Collateral 59231	06/30/2023	TenantRating	Fine
Sample Loan 17		07/31/2023	TrueBorrowerRating	D90+
Sample Loan 18		07/31/2023	LoanStatus	Excellent
Sample Loan 19	Test Collateral 59231	07/31/2023	TenantRating	Poor
Sample Loan 20		08/31/2023	TrueBorrowerRating	Foreclosure
Sample Loan 21		08/31/2023	LoanStatus	Outstanding
Sample Loan 22	Test Collateral 59231	08/31/2023	TenantRating	Real Estate Owned
Sample Loan 23		09/30/2023	LoanStatus	

Figure 29: Errors highlighted red in the Unimported Loan Updates File. Error messages are shown when hovering over a highlighted cell.

The unimported loan updates file shows all the loans containing errors that were unable to be updated in Lender. All errors in this file must be corrected for a given loan to be imported into Lender. To access this file:

1. Navigate to Admin → Loans → Summary page.
2. In the Recent Imports table, locate the record for the import you completed.
 - a. If you cannot find your import, click **View More »**, or click on the **Import History** tab to view the complete history of imports into the account.
3. Click the download link under the Unimported Loans column to download the Unimported Loan Updates File.

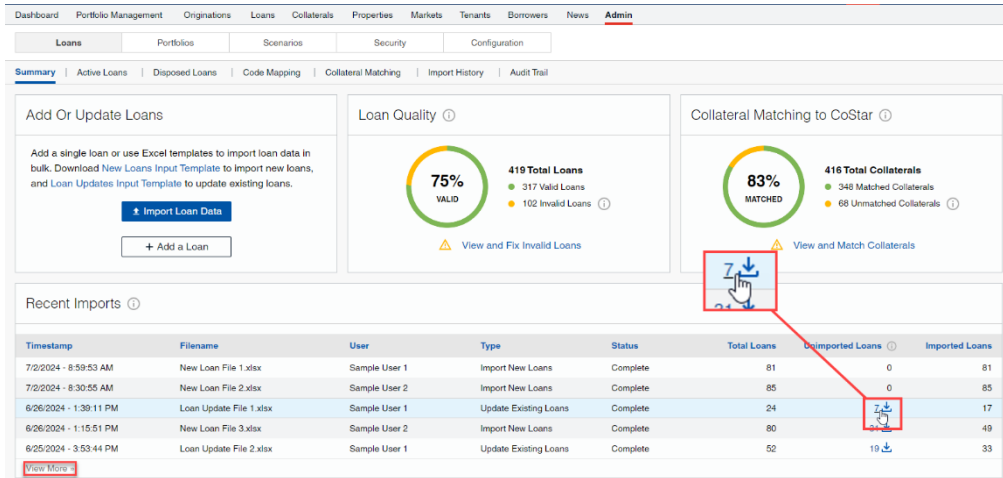


Figure 30: The Admin → Loans → Summary page. To download the unimported file, click the download link under the Unimported Loans column in the Recent Imports table. To download the file for an older import, click View More » to access the Import History table, which contains a complete history of imports into the account.

Section 4: Code Mapping

If your organization uses codes that are different from CoStar inputs, you can add code mappings to map the CoStar values to your corresponding codes. You may define code mappings prior to beginning imports, or you will be prompted to add them during the import process (see [Section 4.2](#) for more details).

4.1 Code Mapping Table

Summary Active Loans Disposed Loans Code Mapping Collateral Matching Import History Audit Trail			
Code Mapping ⓘ			
DayCountConvention X LoanStatus X		Clear	Add New Entry
Input Field Name	User Input Value	CoStar Input Value	
DayCountConvention	ACT/ACT	Actual/Actual	Edit ⓘ
DayCountConvention	ACT/THREEHUNDREDSIXTY	Actual/360	Edit ⓘ
DayCountConvention	ACT/THREEHUNDREDSIXTYFIVE	Actual/365	Edit ⓘ
DayCountConvention	ACTUAL360DAYYEAR	Actual/360	Edit ⓘ
DayCountConvention	THIRTY/THREEHUNDREDSIXTY	30/360	Edit ⓘ
DayCountConvention	THIRTY/THREEHUNDREDSIXTYFIVE	30/365	Edit ⓘ
LoanStatus	30 DAY	D30	Edit ⓘ
LoanStatus	60 DAY	D60	Edit ⓘ
LoanStatus	90+ DAY	D90+	Edit ⓘ
LoanStatus	FRCLSR	Foreclosure	Edit ⓘ
LoanStatus	PERFORM	Performing	Edit ⓘ
LoanStatus	RE OWNED	Real Estate Owned	Edit ⓘ

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Show 50 per page ▼

Figure 31: Admin → Loans → Code Mapping table, filtered to show records for DayCountConvention and LoanStatus

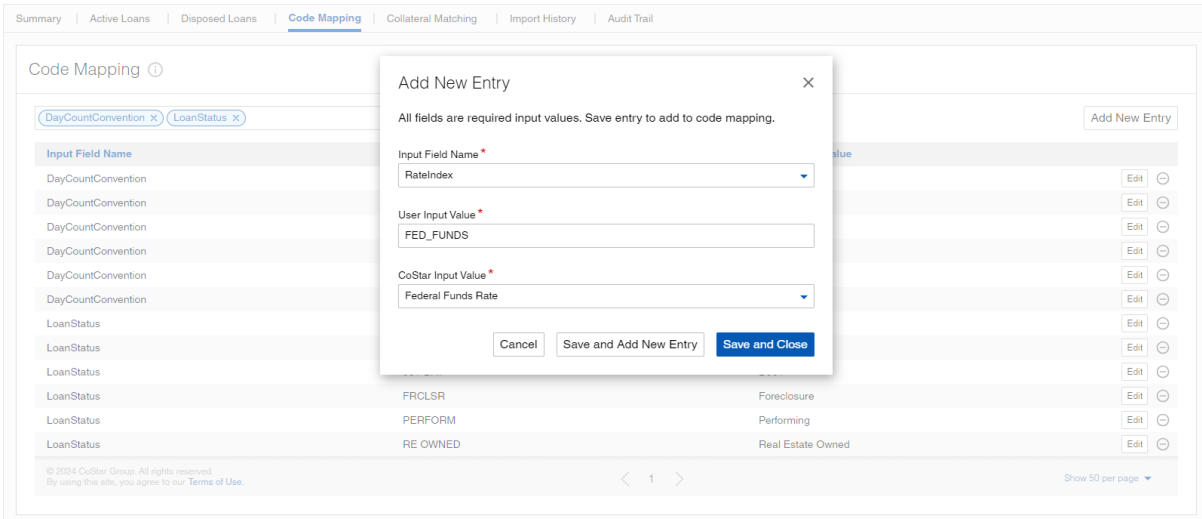


Figure 32: Add New Entry dialogue, accessed from the Admin → Loans → Code Mapping table

To add a code mapping prior to the import process:

1. Navigate to Admin → Loans → Code Mapping
2. Click the **Add New Entry** button.
3. **Input Field Name:** Choose the Lender input field where you want to apply a code mapping.
4. **User Input Value:** Specify the code to be used in the input file.
5. **CoStar Input Value:** Select the corresponding CoStar input value to which your code aligns.
6. Click **Save and Close** to save your code mapping and exit the dialogue or click **Save and Add New Entry** to keep the dialogue open and continue adding more code mappings.

Code mappings are synced across all users in the organization and apply to all future imports after the mapping is saved. They are not applied retroactively to previous imports.

4.2 Code Mapping during Import

If the import process identifies codes that do not match CoStar values, you will receive a prompt displaying a table listing all occurrences of Unknown Input Values. To proceed with the import, code mappings must be provided for all Unknown Input Values.

Code Mapping

6 Unknown Input Values cannot be recognized by CoStar Lender.

Please map them to CoStar Input Values. To stop the import process, click "Cancel Import".

Once all the unknown inputs are successfully mapped, click "Continue" to proceed.

Input Field Name	User Input Value	CoStar Input Value
MostRecentBorrowerRating	SUPERB	Select
MostRecentBorrowerRating	VERY GOOD	Select
MostRecentTenantRating	ACCEPTABLE	Select
MostRecentTenantRating	SATISFACTORY	Select
PropertyType	APARTMENTS	Select
PropertyType	HOTELS	Select

Cancel Import

Continue

Figure 33: Dialogue shown when prompted for Code Mapping during a new loan import

If you need more time to complete code mapping, you can cancel the import and download an Excel file with a list of all the Unknown Input Values.

Code Mapping

6 Unknown Input Values cannot be recognized by CoStar Lender.

Please map them to CoStar Input Values. To stop the import process, click "Cancel Import".

Once all the unknown inputs are successfully mapped, click "Continue" to proceed.

Input Field Name	User Input Value	CoStar Input Value
MostRecentBorrowerRating	ACCEPTABLE	Select
MostRecentBorrowerRating	SATISFACTORY	Select
MostRecentBorrowerRating	SUPERB	Select
MostRecentBorrowerRating	VERY GOOD	Select
PropertyType	APARTMENTS	Select
PropertyType	HOTELS	Select

Cancel Import

Continue

Code Mapping

6 Unknown Input Values cannot be recognized by CoStar Lender.

Please map them to CoStar Input Values. To stop the import process, click "Cancel Import".

Once all the unknown inputs are successfully mapped, click "Continue" to proceed.

Input Field Name	User Input Value	CoStar Input Value
MostRecentBorrowerRating	ACCEPTABLE	Select
MostRecentBorrowerRating	SATISFACTORY	Select
MostRecentBorrowerRating	SUPERB	Select
MostRecentBorrowerRating	VERY GOOD	Select
PropertyType	APARTMENTS	Select
PropertyType	HOTELS	Select

Cancel Import

Continue

Cancel Import Process

Warning: We are unable to import your file until you complete Code Mapping. Any inputs to CoStar Input Values will not be saved. Are you sure you want to cancel?

☒ Download Unknown Input Values

Close

Cancel Import

Figure 34: Steps to cancel an import and download the Unknown Input Values file

This “Unknown Input Values” file contains three tabs:

- **Unknown Input Values:** Lists all the input values provided in the import file that could not be recognized by CoStar.
- **Code Mappings:** Lists all the possible CoStar values to which the unknown input values could be mapped.
- **Download:** The date and name of the user who downloaded the file.

This file can be used as a reference when filling out code mappings next time the file is imported.

	A	B	C	D
1	Input Field Name	User Input Value		
2	MostRecentBorrowerRating	SUPERB		
3	MostRecentBorrowerRating	VERY GOOD		
4	MostRecentTenantRating	ACCEPTABLE		
5	MostRecentTenantRating	SATISFACTORY		
6	PropertyType	APARTMENTS		
7	PropertyType	HOTELS		
8				
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< >
Unknown Input Values
Code Mappings
Download

Figure 35: The Unknown Input Values file, showing six unknown input values detected during import.

Section 5: Summary of Loan Errors and Unmatched Collaterals

5.1 Overview

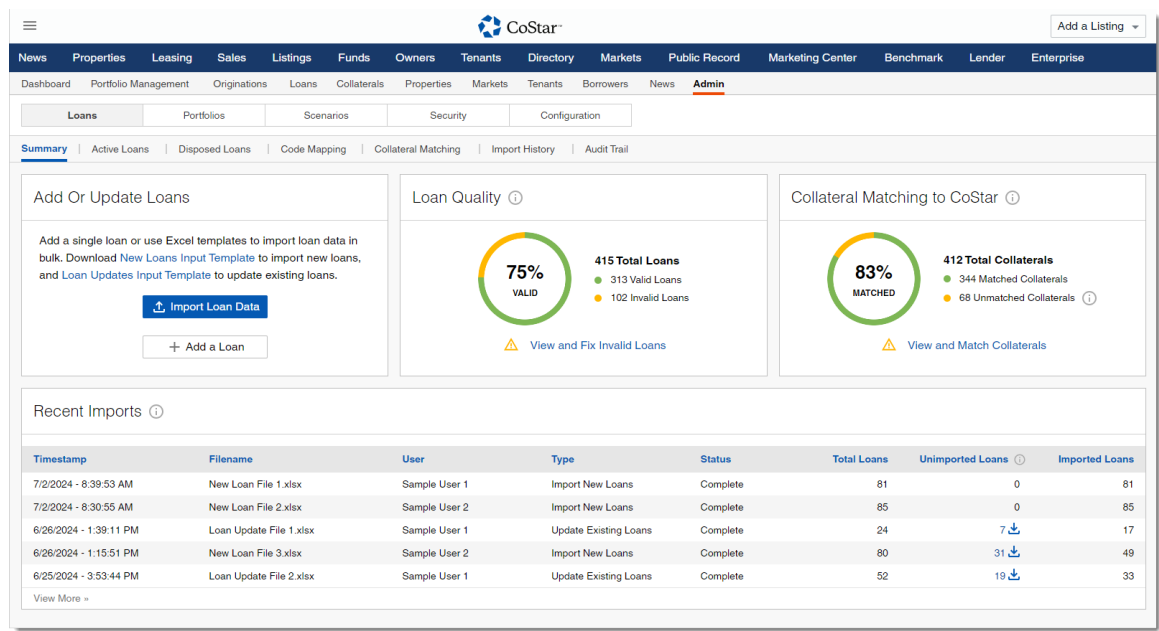


Figure 36: The full Admin → Loans → Summary page

The Admin → Loans → Summary page serves as a new centralized hub for admins to import new loans, update existing ones, monitor loan imports, and assess the number of loans in the portfolio with errors or unmatched collaterals. Loans and collaterals are tracked in two separate widgets.

5.2 Loan Quality Widget

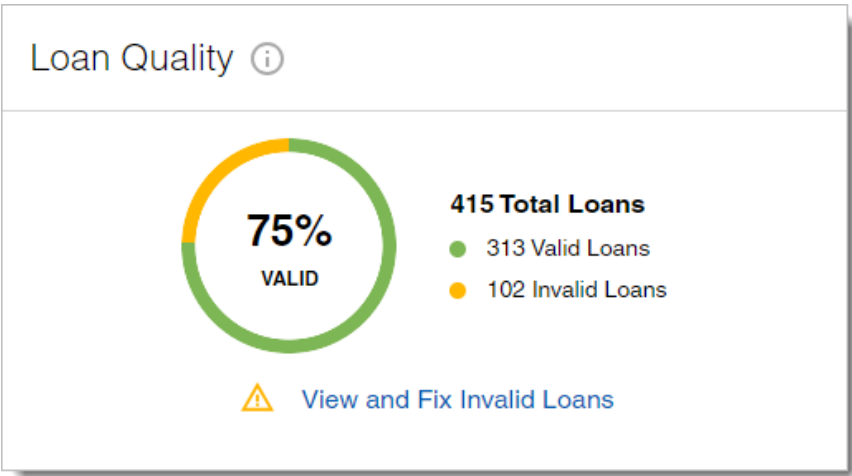


Figure 37: Loan Quality widget, indicating 75% of the total loans are valid. Invalid loans can be corrected by clicking the “View and Fix Invalid Loans” hyperlink.

The Loan Quality widget breaks down the number of loans in the portfolio that are valid and invalid. Invalid loans require errors to be corrected for the loan to properly return CoStar data and analytics and be viewable elsewhere in Lender.

The number of Invalid Loans includes any loan in the Active Loans table with a Calculation Results status of Error. Click **View and Fix Invalid Loans** to access the Active Loans table, filtered to show only Error loans.

5.3 Collateral Matching to CoStar Widget

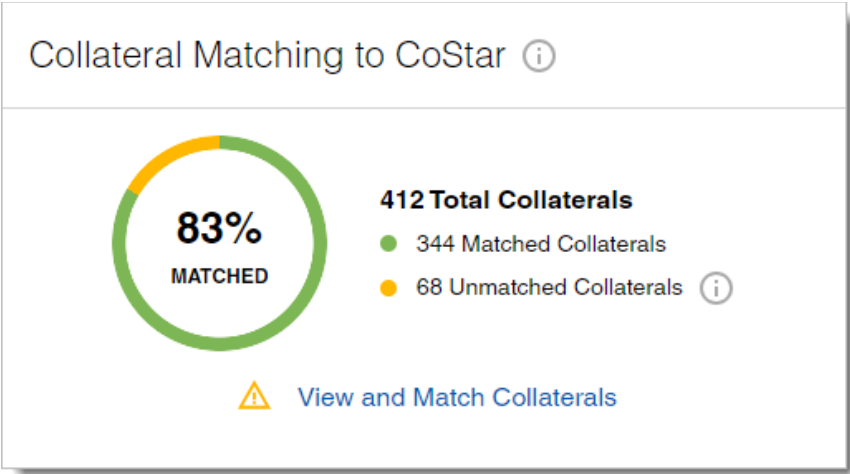


Figure 38: Collateral Matching to CoStar widget, indicating 83% of the total collaterals are matched to properties. Unmatched collaterals can be corrected by clicking the “View and Match Collaterals” hyperlink.

The Collateral Matching to CoStar widget breaks down the number of collaterals in your portfolio that are matched and unmatched. Unmatched collaterals should be matched to CoStar properties to fully leverage CoStar’s property, market, and tenant analytics. Hovering over the info icon next to Unmatched Collaterals shows a more detailed breakdown with statuses describing why the collateral is unmatched (see [Section 7.2](#) for more information on collateral statuses).

The number of Unmatched Collaterals includes any collateral with a status of Unmatched, Support Requested, Invalid Address, or Unsupported. Click **View and Match Collaterals** to access the Collateral Matching table, filtered to show only collaterals with the unmatched statuses.

5.4 Recent Imports Table

Recent Imports ⓘ							
Timestamp	Filename	User	Type	Status	Total Loans	Unimported Loans ⓘ	Imported Loans
7/2/2024 - 8:39:53 AM	New Loan File 1.xlsx	Sample User 1	Import New Loans	Complete	81	0	81
7/2/2024 - 8:30:55 AM	New Loan File 2.xlsx	Sample User 2	Import New Loans	Complete	85	0	85
6/26/2024 - 1:39:11 PM	Loan Update File 1.xlsx	Sample User 1	Update Existing Loans	Complete	24	7 ⬇️	17
6/26/2024 - 1:15:51 PM	New Loan File 3.xlsx	Sample User 2	Import New Loans	Complete	80	31 ⬇️	49
6/25/2024 - 3:53:44 PM	Loan Update File 2.xlsx	Sample User 1	Update Existing Loans	Complete	52	19 ⬇️	33
View More »							

Figure 39: Recent Imports table, showing the five most recent imports. Click the View More » button to access the full Import History table.

The Recent Imports table shows the five most recent imports into the account by any user in the organization. The columns in this table contain key information about each import record:

- **Timestamp:** The time at which the import began.

- **Filename:** The name of the original import file.
- **User:** The name of the user who initiated the import.
- **Type:** Indicates whether the import type was new loans or loan updates.
- **Status:** Indicates the current state of the import:
 - *Completed:* The import completed.
 - *In Progress:* The import is ongoing.
 - *Failed:* The import was canceled or unable to be completed.
- **Total Loans:** Total number of loans in the original import file.
- **Unimported Loans:** Number of loans not imported due to errors.
 - If an import generated an Unimported Loan (or Loan Updates) File, the file can be downloaded by clicking the hyperlinked count under this column.
- **Imported Loans:** Number of loans imported (with or without non-critical errors).

Clicking **View More »** will open the Import History table, which contains all records of imports into the account.

Section 6: Import History

Dashboard	Portfolio Management	Originations	Loans	Collaterals	Properties	Markets	Tenants	Borrowers	News	Admin
	Loans	Portfolios	Scenarios	Security	Configuration					
Summary	Active Loans	Disposed Loans	Code Mapping	Collateral Matching	Import History	Audit Trail				
Type	Timestamp									
Timestamp ↓	Filename	User	Type	Status	Total Loans	Unimported Loans ⓘ	Total Loans	Invalid Loans ⓘ	Total Collaterals	Unmatched Collaterals ⓘ
5/28/2024 - 7:58:52 AM	New Loan Import 1.xlsx ↓	Portfolio Import	Import New Loans	Complete	20	10 ↓	10	0	10	0
5/28/2024 - 7:45:53 AM	New Loan Import 2.xlsx ↓	Portfolio Import	Import New Loans	Complete	20	4 ↓	16	0	16	0
5/28/2024 - 7:20:56 AM	New Loan Import 3.xlsx ↓	Portfolio Import	Import New Loans	Complete	3	0	3	3	3	0
5/28/2024 - 7:17:38 AM	New Loan Import 4.xlsx ↓	Portfolio Import	Import New Loans	Complete	21	3 ↓	18	0	18	0
5/24/2024 - 1:28:07 PM	Loan Update Import 1.xlsx ↓	Portfolio Import	Update Existing Loans	Complete	2	1 ↓	1	-	-	-
5/24/2024 - 1:27:20 PM	Loan Update Import 2.xlsx ↓	Portfolio Import	Update Existing Loans	Complete	2	1 ↓	1	-	-	-

Figure 40: Import History table

The Import History table provides detailed information about past imports into your account:

- **Timestamp:** The time at which the import began.
- **Filename:** The name of the original import file.
- **User:** The name of the user who initiated the import.
- **Type:** Indicates whether the import type was new loans or loan updates.
- **Status:** Indicates the current state of the import:
 - *Completed:* The import completed.
 - *In Progress:* The import is ongoing.
 - *Failed:* The import was canceled or unable to be completed.
- **Total Loans:** Total number of loans in the original import file.
- **Unimported Loans:** Number of loans not imported due to errors.
 - If an import generated an Unimported Loans (or Loan Updates) File, the file can be downloaded by clicking the hyperlinked count under this column.
- **Imported Loans**
 - **Total Loans:** Total number of loans imported.
 - **Invalid Loans:** Number of invalid loans imported.

- **Total Collaterals:** Total number of collaterals imported.
- **Unmatched Collaterals:** Number of collaterals imported without a CoStar property match.

Records can be filtered by import type and timestamp, using the dropdowns above the table.

Section 7: Collateral Matching

7.1 Collateral Matching Table

Collateral ID	Collateral Name	Loan ID	Loan Name	Collateral Address	City	State	ZIP Code	Collateral Status	Matched CoStar Properties
									Primary Property Address, City, State, ZIP Code, Property Count
Test Collateral...	Test Collateral 39478	1 Comm...	1 Commerce Blvd	1 Commerce Blvd	Amyville	NY	11701	Matched	1 Commerce Blvd, Amyville, NY, 11701, 1
Test Collateral...	Test Collateral 13084	100 E Ma...	100 E Main St	100 E Main St	Arlington	KS	67514	Matched	100 E Main St, Arlington, KS, 67514, 1
Test Collateral...	Test Collateral 25371	100 Thom...	100 Thompson Farm	100 Thompson Farm	Bedford	MA	01730	Matched	100 Thompson Farm, Bedford, MA, 01730, 1
Test Collateral...	Test Collateral 32338	1041 N Fi...	1041 N Formosa Ave	1041 N Formosa Ave	West Holly...	CA	90046	Matched	1041 N Formosa Ave, West Holly..., CA, 90046, 1
Test Collateral...	Test Collateral 18106	1048 Unk...	1048 Unknown Blvd	333 S Hope St	Los Angeles	CA	90071	Matched	333 S Hope St, Los Angeles, CA, 90071, 1
Test Collateral...	Test Collateral 40461	1094 No-2...	1094 No-210 Hwy	1094 No-210 Hwy	Sneads Ferry	NC	28460	Matched	1094 No-210 Hwy, Sneads Ferry, NC, 28460, 1
Test Collateral...	Test Collateral 72306	1094 Unk...	1094 Unknown Dr	1094 Unknown Dr	San Diego	CA	92113	Unmatched	-
Test Collateral...	Test Collateral 91967	1111 N H...	1111 N Harrison St	1111 N Harrison St	Saginaw	MI	48602	Invalid Address	-
Test Collateral...	Test Collateral 93999	1130 Golf...	1130 Golf Club Rd SE	1130 Golf Club Rd SE	Lacey	WA	98503	Matched	1130 Golf Club Rd, Lacey, WA, 98503, 1
Test Collateral...	Test Collateral 74510	11768 W...	11768 W Broad St	11768 W Broad St	Richmond	VA	23033	Support Requested	Withdraw
Test Collateral...	Test Collateral 69267	12300 Pa...	12300 Park Central Dr	12300 Park Central Dr	Dallas	TX	75251	Matched	12300 Park Central Dr, Dallas, TX, 75251, 1
Test Collateral...	Test Collateral 79115	1314 N W...	1314 N West Ave	1314 N West Ave	Jackson	MI	48202	Matched	1314 N West Ave, Jackson, MI, 48202, 1
Test Collateral...	Test Collateral 32030	1316 Sad...	1316 Sadler St	1316 Sadler St	Houston	TX	77022	Matched	1316 Sadler St, Houston, TX, 77022, 1
Test Collateral...	Test Collateral 63315	132 N El...	132 N Elm St	132 N Elm St	Westfield	MA	01085	Matched	132 N Elm St, Westfield, MA, 01085, 1
13786 Jones...		13786 Jo...	13786 Jones St	13786 Jones St	Lavonia	GA	30053	Invalid Address	-
Test Collateral...	Test Collateral 86029	14895 Be...	14895 Bear Valley Rd	14895 Bear Valley Rd	Hesperia	CA	92345	Matched	14895 Bear Valley Rd, Hesperia, CA, 92345, 1

Figure 41: Collateral Matching table

The collateral matching table lists all collaterals in the portfolio and indicates which collaterals are matched and unmatched. Any collateral highlighted in red is unmatched, indicating that it is not linked to a CoStar property. Collaterals must be matched for the loan to make full use of CoStar's property, market, and tenant analytics.

- **Collateral ID:** The collateral's ID.
- **Collateral Name:** The collateral's name.
- **Loan ID:** The loan's ID.
- **Loan Name:** The loan's name.
- **Collateral Address:** The user-defined address of the collateral.
- **City:** The user-defined city of the collateral.
- **State:** The user-defined state of the collateral.
- **ZIP Code:** The user-defined ZIP code of the collateral.
- **Collateral Status:** Indicates whether the collateral is matched (see [Section 7.2](#) for more details).
- **Matched CoStar Properties**
 - **Primary Property Address:** The CoStar-defined address of the primary property.
 - **City:** The CoStar-defined city of the primary property
 - **State:** The CoStar-defined state of the primary property.
 - **ZIP Code:** The CoStar-defined ZIP code of the primary property.
 - **Property Count:** The number of properties matched to the collateral.

Selections made in the **Collateral Status** dropdown filter the table to show only collaterals with the selected collateral status(es). Collaterals can also be searched for by Loan ID, Loan Name, Collateral ID,

Collateral Name, or Address using the search bar. The contents of this table can be viewed in an Excel file by clicking the **Export** button.

All unmatched collaterals can be submitted to our support team for assistance with matching by clicking the **Request Matching Support** button (see [Section 7.4](#) for more details).

7.2 Collateral Statuses

Collaterals can have five different statuses depending on whether they are matched to a CoStar property, whether the collateral was imported with an address, and any determination made by the matching support team. The five statuses are:

- **Matched:** Collaterals linked to at least one CoStar property. Properties linked to these collaterals were either:
 - Imported and automatically matched to a property during the import.
 - Matched manually through one of the collateral forms.
 - Matched by the matching support team in response to a support request.
- **Unmatched:** Unmatched collaterals have sufficient address data but are not linked to a CoStar property. These collaterals may be matched manually or submitted for matching support.
- **Support Requested:** Support Requested collaterals have been submitted for matching support.
 - Matching support requests on these collaterals can be withdrawn at any time.
 - Inputs for these collaterals are locked until the support request has either been fulfilled or withdrawn.
- **Invalid Address:** Invalid Address collaterals do not contain sufficient information to identify a match. These collaterals were either:
 - Imported without an address and require one before they can be submitted for matching support.
 - Reviewed by the matching support team, who were unable to identify a match due to inaccurate or insufficient information.
- **Unsupported:** Unsupported collaterals were reviewed by the matching support team, who were unable to identify a property match that can be used in Lender. These addresses were deemed by the matching support team to either be:
 - Single-family residential addresses
 - Addresses located outside of the United States

7.3 Collateral Forms

Figure 42: Collateral Matching form

Figure 43: Collateral Information form

Collateral data can now be configured through the Collateral Matching and Collateral Information forms. These forms can be accessed from the following locations:

- **Collateral Matching:** Admin → Loans → Collateral Matching table → Collateral Status link
- **Collateral Information:** Admin → Loans → Active Loans table → Loan Origination form → Collateral Information card → “Add Collateral” or “Edit” buttons

7.3.1 Collateral Matching Form

The Collateral Matching form supports property matching and editing address details. Click **Save** to save all changes on the form and return to the Collateral Matching table. Assistance with matching to a CoStar property can also be requested by clicking **Request Matching Support**.

7.3.2 Collateral Information Form

The Collateral Information form supports editing all information about a collateral, including its property matches, address details, and financials such as NOI and Value. Click **Save** to save all changes on the form and return to the Loan Origination form. Assistance with matching to a CoStar property can also be requested by clicking **Request Matching Support**.

7.4 Collateral Matching Support

7.4.1 How Matching Support Works

Collaterals can be submitted to CoStar for assistance with matching to properties so that your loan results fully leverage CoStar’s property, market, and tenant analytics. Once a collateral is submitted for matching support, please allow approximately two weeks for our support team to respond to a request.

Only the following fields are submitted to our support team. Loan financials and other details are not included in the request.

- Loan Type

- Collateral Address
- City
- State
- ZIP Code
- Property Type

Inputs cannot be edited on collaterals submitted for matching support until the support request is either fulfilled or withdrawn.

7.4.2 Submitting One Collateral

Collateral Matching

CoStar Property Matches

Collateral Details

Test Collateral 73669
Collateral ID: Test Collateral 73669
Loan ID: 100 Jackson Ave | Loan Name: 100 Jackson Ave

Save

Cancel

Request Matching Support

CoStar Property Matches

Status: Unmatched ⓘ

Use the map and search box below to find properties. In the Search Results tab, click the + button to match a property to this collateral.

Tips:

- Any errors are shown in this area.
- Be sure to enter values for all fields with a red asterisk.

Figure 44: The Collateral Matching form, with the Request Matching Support button highlighted. If the collateral's status is Unmatched, click the button to submit this collateral to our support team for matching assistance.

You may submit one collateral for matching support by following the steps below:

1. Navigate to Admin → Loans → Collateral Matching table.
2. Click the link next to the collateral's status to access the Collateral Matching form.
3. Click the **Request Matching Support** button.
4. Read the information about matching support requests and click **Request Support** to submit the collateral.

You can also submit matching support requests from the Collateral Information form:

1. Navigate to Admin → Loans → Active Loans table.
2. Click on the loan with the collateral you're requesting support for.
3. Click on the origination date of the loan to access the Loan Inputs form.
4. In the Collateral Information card, click **Edit** next to the collateral needing support.
5. In the Collateral Information form, click the **Request Matching Support** button.
6. Read the information about matching support requests and click **Request Support** to submit the collateral.

7.4.3 Submitting All Collaterals

Collateral ID	Collateral Name	Loan ID	Loan Name ↑	Collateral Address	City	State	ZIP Code	Collateral Status ⓘ	Matched CoStar Properties
									Primary Property Address
									City
									State
									ZIP Code
									Property Count

Figure 45: The collateral matching table, with Request Matching Support button highlighted. Click the button to submit all collaterals in the table with "Unmatched" status to our support team for matching assistance.

You may submit all collaterals eligible for matching support by following the steps below:

1. Navigate to Admin → Loans → Collateral Matching tab.
2. Click the **Request Matching Support** button.
3. Read the information about matching support requests and click **Request Support** to submit all unmatched collaterals.

7.4.4 Withdrawing Support Requests

Collateral ID	Collateral Name	Loan Name ↑	Collateral Address	City	State	ZIP Code	Collateral Status	Primary Property Address	City	State	ZIP Code	Property Count
Test Collateral 57184	Test Collateral 57184	103 NW 63rd Ave	103 NW 63rd Ave	Bentonville	AR	72713	Support Requested Withdraw	-	-	-	-	-

Figure 46: The collateral matching table, filtered to only show loans submitted for matching support. Click the **Withdraw** link to cancel the support request for a collateral.

Matching support requests can be withdrawn at any time. To withdraw a support request:

1. Navigate to Admin → Loans → Collateral Matching table.
2. Locate the collateral with the active support request (status will be Support Requested).
3. Under the Collateral Status column, click **Withdraw**.
4. Confirm and click **Withdraw Request** to withdraw the support request.

Support requests can also be withdrawn from the Collateral Information form:

1. Navigate to Admin → Loans → Active Loans table.
2. Click on the loan with the collateral you're requesting support for.
3. Click on the origination date of the loan to access the Loan Inputs form.
4. In the Collateral Information card, click **Edit** next to the collateral for which you're withdrawing support.
5. In the Collateral Information form, click the **Withdraw Matching Support** button.
6. Confirm and click **Withdraw Request** to withdraw the support request.

After withdrawing the request, the table will refresh and update the collateral's status to Unmatched.

7.4.5 Re-Submitting Support Requests

Support requests can be re-submitted on the same collateral by following the same steps as above. If the original support request was returned by the support team with a status of Invalid Address or Unsupported, then at least one edit must be made to any one of the following fields:

- Collateral Address
- City
- State
- ZIP Code

If the original support request was withdrawn, no edits need to be made to re-submit a request.