Will be Live August 3, 2026

New File Transfer Tab

We're excited to share that we are enhancing the **File Transfer** tab experience within your client dashboard.

In the coming days, the current File Transfer tab will be replaced with a **new, modernized interface** designed to improve usability and provide a more intuitive experience—while maintaining the same core functionality you rely on today.

What's changing:

- Updated look and feel for easier navigation
- Improved layout for quicker access to key actions
- A more streamlined, user-friendly experience
- Drag and drop capability for easier file uploads.
- Client Specific Procedures, Client Specific Forms, and the User Guide for the File Transfer tab will be moving to the Document Library tab of your dashboard.

What's staying the same:

- All existing functionality
- Your current workflows and processes

There is **no action required** on your part, and your access and permissions will remain unchanged. The new File Transfer tab will replace the old one. All existing data will be transferred to the new tab.

To help you get familiar with the updated interface, we've included a **User Guide** with step-by-step instructions and screenshots.

Thank you for your continued partnership. If you have any questions in the meantime, please don't hesitate to reach out to Donna Rowe at donna.rowe@firstsource.com.

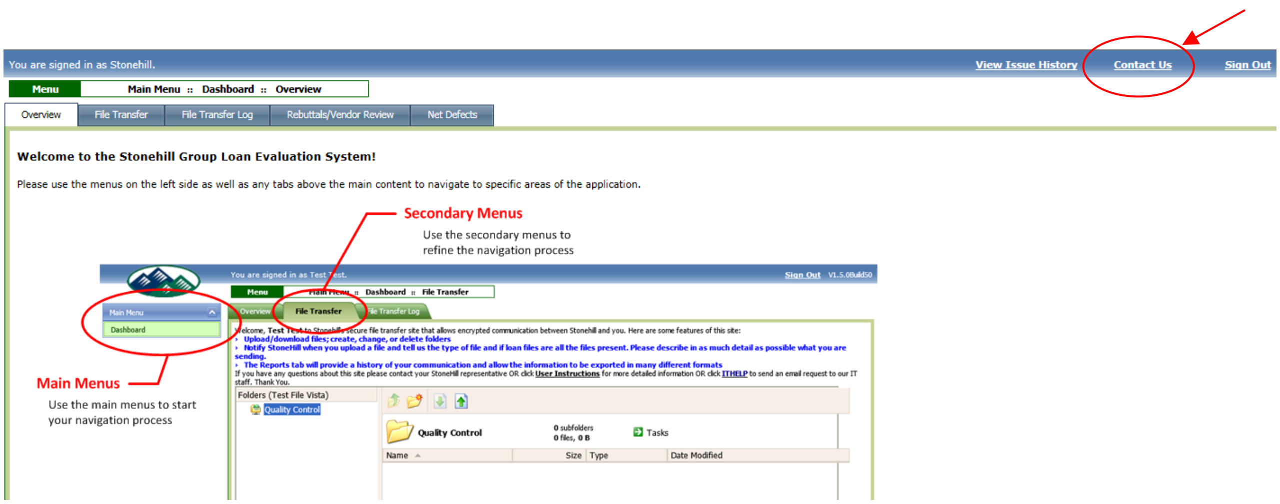
Client Dashboard
User Guide

Table of Contents

Introduction

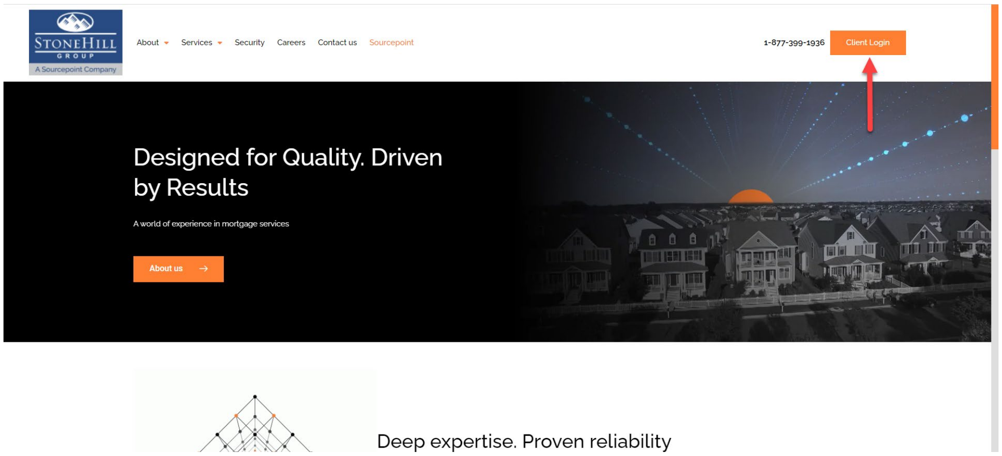
The purpose of this document is to provide step-by-step instructions for logging into the client dashboard, uploading/downloading files and creating/changing/deleting folders or documents.

If at any time you experience difficulty or have any questions, please use the "Contact Us" link located at the top right of your Dashboard to submit a ticket.

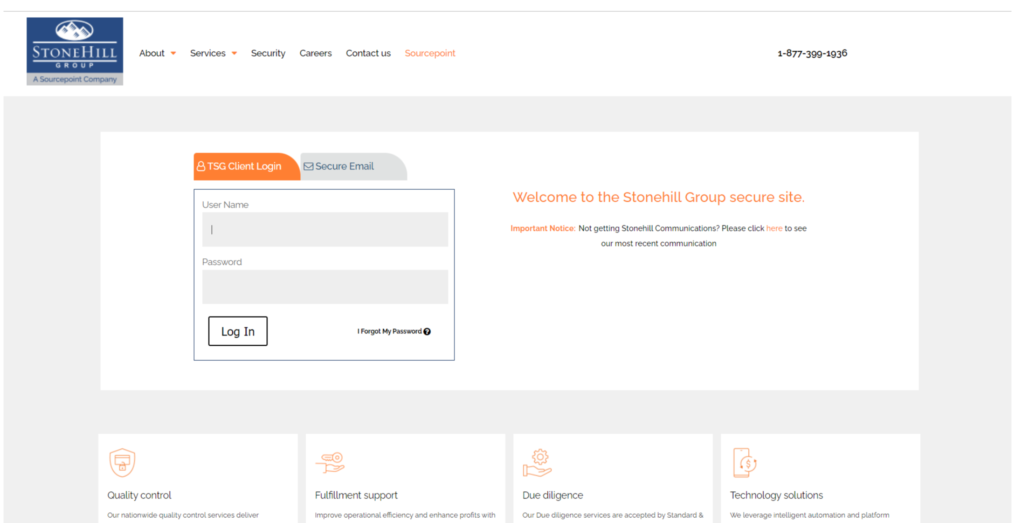


Accessing the Client Dashboard

1. Navigate to www.stonehillgroup.com and select “Client Login” in the upper, right-hand corner.



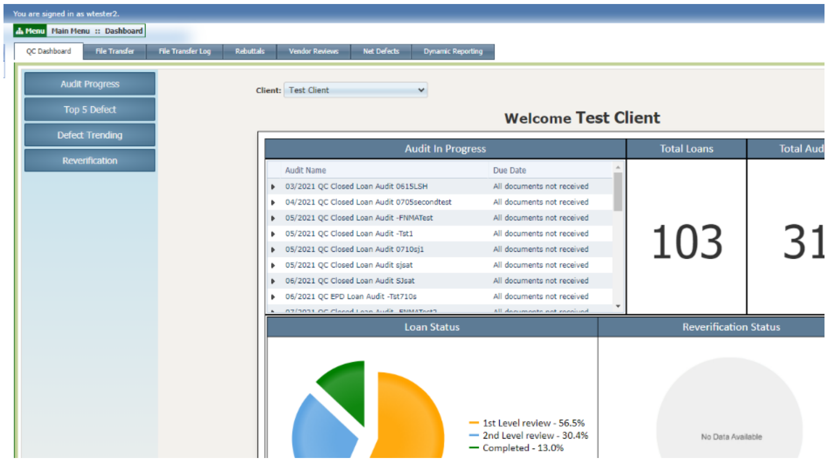
2. After clicking the “CLIENT LOGIN” link, you will see the following web page. You will enter your username and password, then click login.



NOTE:

If this is the first time you have logged into the client portal, you will be asked to set up “Security Questions.” Proceed by selecting your security questions and answers.

Once you are signed into the client portal you will be presented with a main “Dashboard”.



The tabs available include the following (depending on the service provided):

- **<u>File Transfer:</u>** For Uploading/downloading files
- **<u>File Transfer Log:</u>** Allows you to view the log files that record file uploads and downloads.
- **<u>Rebuttals/Vendor Reviews:</u>** On-line submission of Client Rebuttals and Vendor Reviews.
- **<u>Net Defects:</u>** On-line submission and reporting for Client Net Defects.
- **<u>Dynamic Reporting:</u>** Allows you to run predefined reports or create your own reports.

<u>NOTE:</u>

This guide will not review in detail Rebuttals/Vendor Reviews, Net Defects or Dynamic Reporting. Separate guides are available for downloading on the respective tabs.

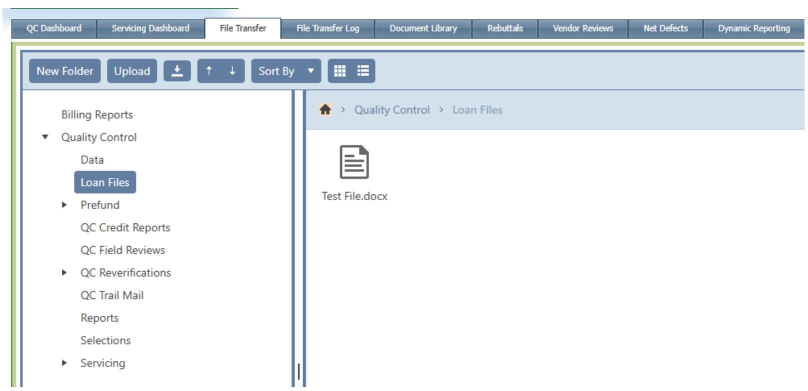
File Transfer Tab

The File Transfer tab is the main screen for uploading/downloading files.

As the client you have complete control over creating/modifying the folders and files located in your client directory.

The StoneHill Group will establish a set of core folders on your behalf. The folders will vary depending on the services provided.

The screen shot below is an example of the standard folders established for all QC clients.

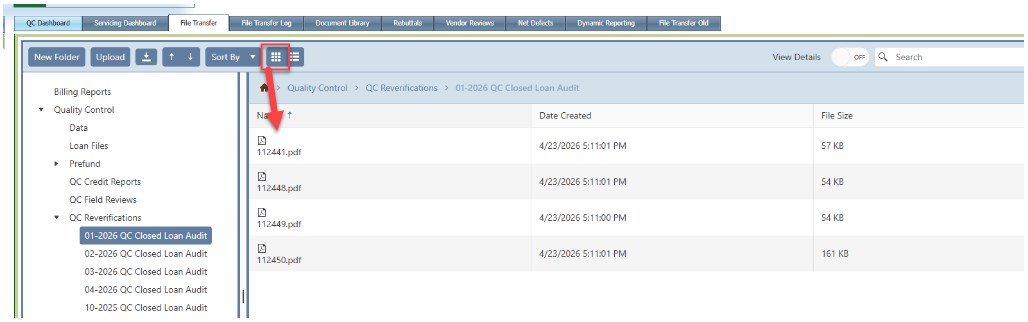


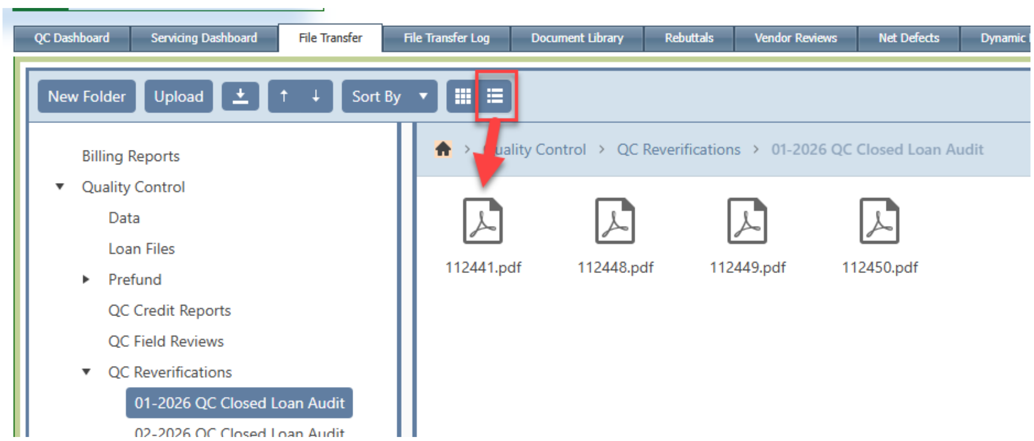
It is important that you do not modify or delete these core folders as it will disrupt the automated retrieval/delivery of your files/reports once they have been uploaded.

The purpose of each folder is listed below, and documents/files being uploaded should be placed in the appropriate folder.

Folder	Purpose
Data	Excel files containing loan data
Loan Files	Loan documentation (.pdf format)
QC Credit Reports	Completed Credit Reports
QC Field Reviews	Completed Field Reviews
QC Reverifications	Completed Reverification response documents that arrive prior to audit completion
QC Trail Mail	Completed Reverification response documents that arrive after audit has been completed
Reports	Client Reports produced by TSG
Selections	Excel Data Files containing Selected loans for an audit

Documents on this tab can be viewed as a List or as an image/thumbnail.





Document/Folder Naming Conventions

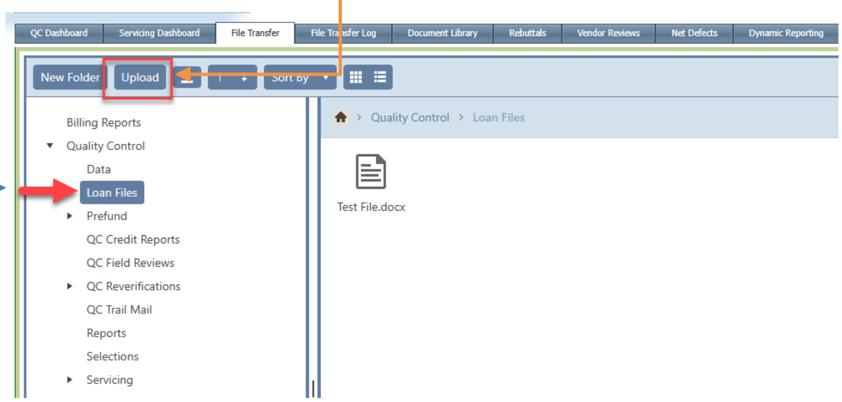
When uploading loan documentation via the File Transfer Tab, The Stonehill Group requests that our clients follow the naming conventions outlined below.

Document	Naming Convention
Single file containing all loan documentation in .pdf format *(preferred)*	*BorrowerLastname – LoanNumber* (ex: Smith – 123456)
Single file containing all loan documentation in .zip compressed format	*BorrowerLastname – LoanNumber* (ex: Smith – 123456)
Multiple documents (Multiple files per a single loan)	*Create sub-folder as BorrowerLastname – LoanNumber* (ex: Smith – 123456) and upload multiple files into sub-folder.

File Uploads

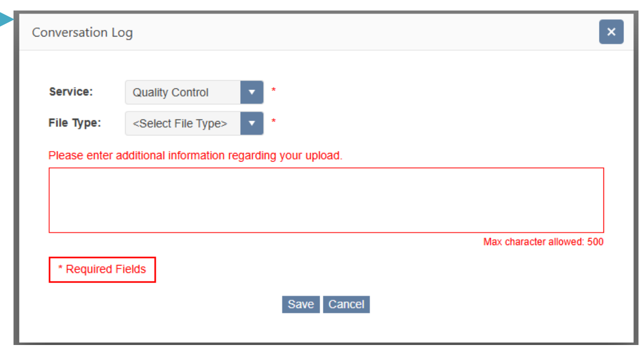
1. Locate and select the folder you wish to upload documents to on the File Transfer Tab.

2. Select the "**Upload**" button.



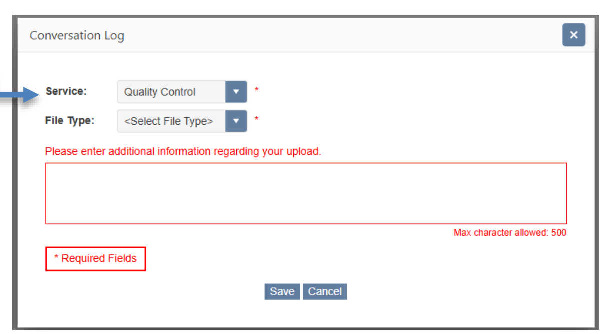
The "Conversation Log" pop-up will display.

Please note required fields are highlighted in **RED.**

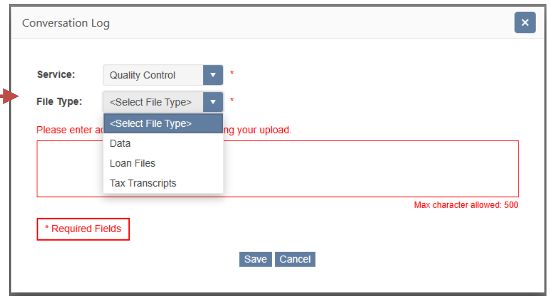


3. Select the appropriate ***Service*** that you are uploading for.

   Note: If only one option is available, the menu will default to the option available.

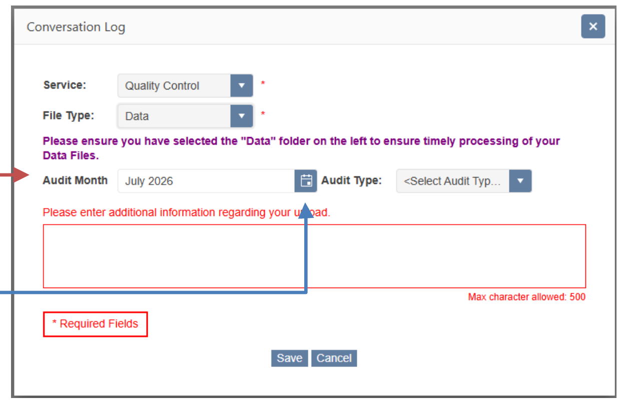


4. Select the drop-down for **File Type** and choose one of the following options:



- ✓ Data
- ✓ Loan Files
- ✓ Tax Transcripts

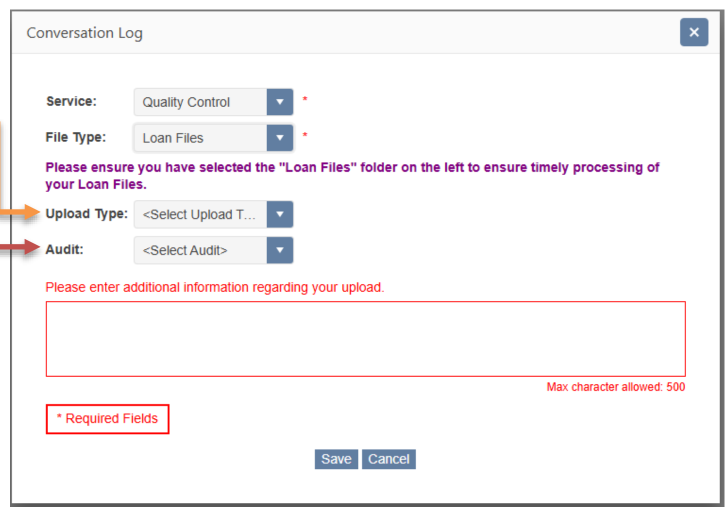
If you are uploading spreadsheets containing loan data for initial audit set up, please select "**Data**" from the dropdown and ensure that you have selected the "Data" folder on the left side of the screen.



You will be prompted to select the **Audit Month** and the **Audit Type**.

If you are uploading supporting Loan Documentation for your selected loans, please select "**Loan Files**."

You will be prompted to select the "**Upload Type**" and "**Audit**."

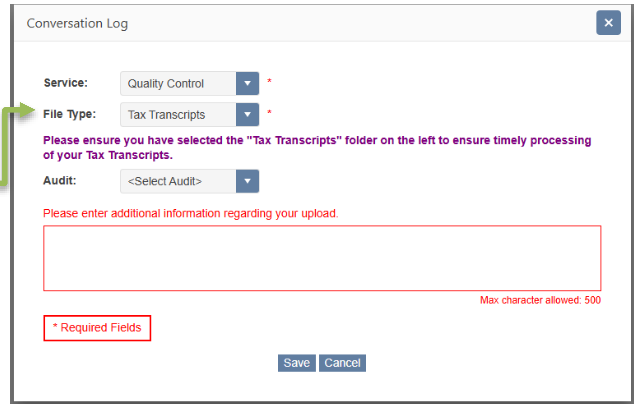


For **"Upload Type"** select ***FULL*** if all documents in an audit are included or select ***PARTIAL*** if only some of the documents are included).

For the **Audit Name**: This drop-down will contain a list of all open audits. Select the audit name that pertains to these loan documents.

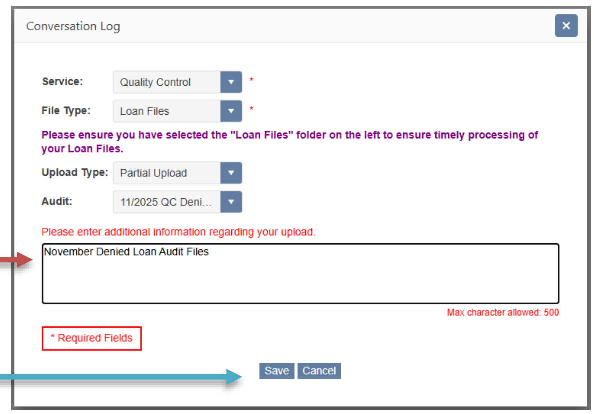
If you are uploading Tax Transcript reports that were not included in the main loan file documents, select “**Tax Transcripts**.”

You will be prompted to select the Audit from the drop-down that the Tax Transcripts belong to.



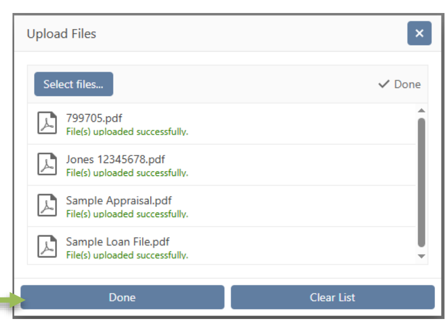
5. Input a brief description of what information/file(s) you are sending in the description box.

6. Select **Save** when completed.

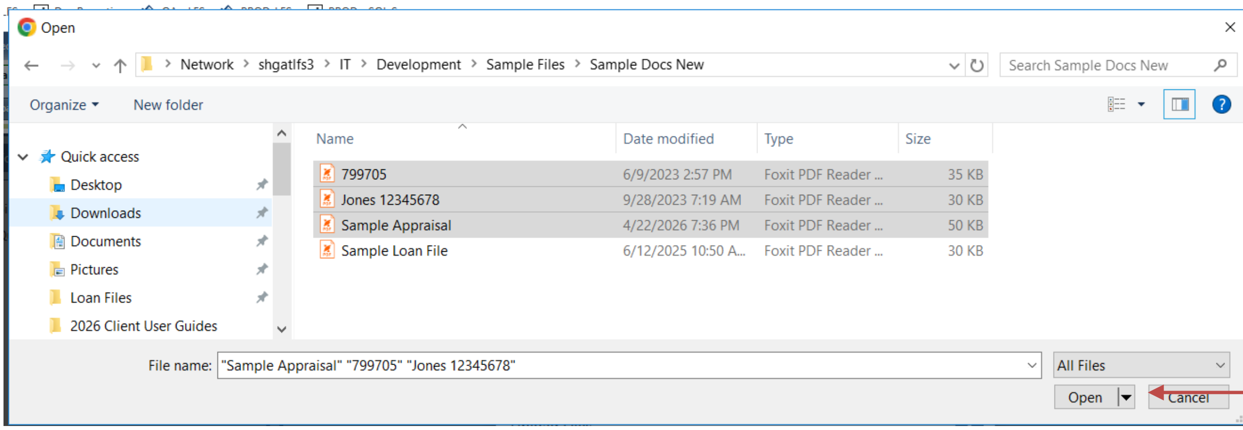


7. The “**Upload Files**” window will appear. *There are 2 options for uploading files*.
   a. Locate and select all documents in a separate Folder window and “drag/drop” the documents to the pop-up where it says, “Drop Files here to Upload.”

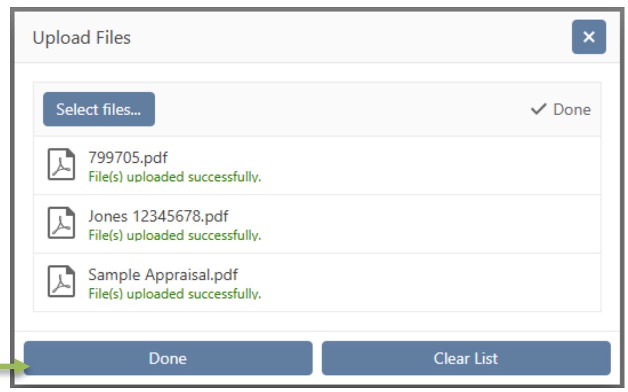
Your uploaded documents will be displayed in the pop-up. You may click “**Done**” once all files appear in the list.



8. You may also hit the "**Select Files**" button which will allow you to browse through your folders to locate the files you wish to upload. Select all desired documents and Click **OPEN**.



9. You will be returned to the ***Upload Files*** window with your document(s) listed. Click **Done** to upload the files.



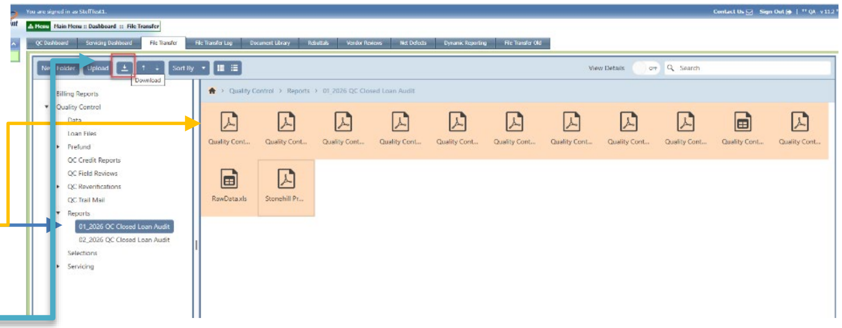
Files will only remain in the folder that you upload them to for a short time. These files will be moved to the appropriate work queue.

Important Note regarding File Types:

- *Supported file types are: *.pdf | *.doc | *.docx | *.tif | *.zip | *.xls | *.xlsx | *.xlsm | *.csv | *.xml |*
- *UN-Supported file types are: *.png |*.msg |*.eml| *.jpg| *.html | *.txt*

File Downloads

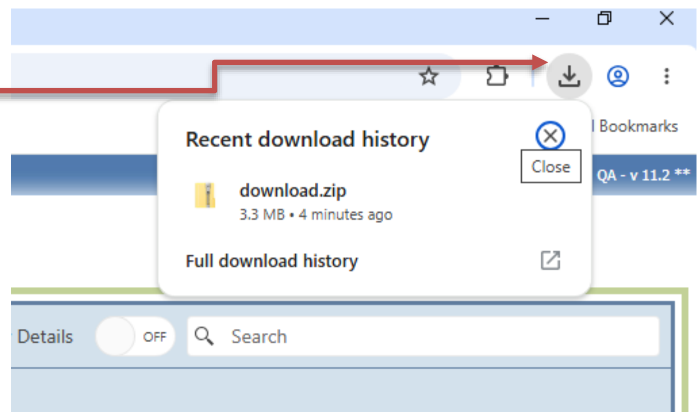
From the File Transfer Tab:



1. Locate and select the folder you wish to download documents from.

2. Select all the files you wish to download on the right-hand side of the windowpane.

3. Click the Download button and all files will be downloaded as a .Zip file.

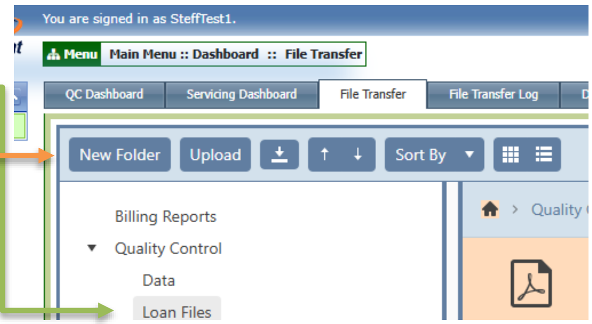


4. Your downloaded .zip file will appear in the download option of your browser.

Creating/Deleting a File or Folder

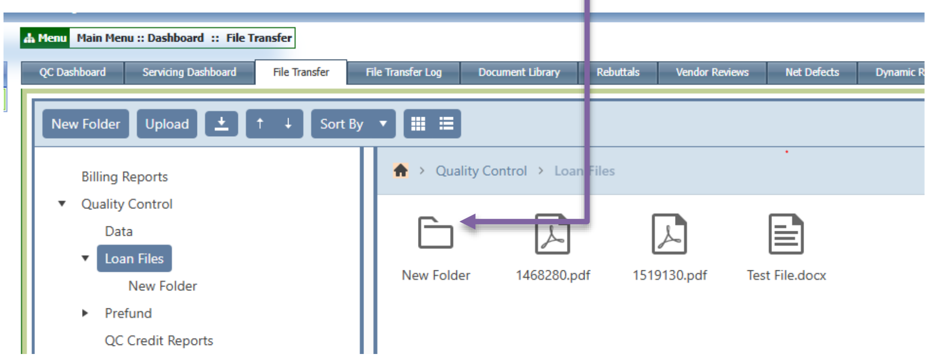
To create a new folder within the Client Dashboard:

1. Select the main folder on the left where you wish to locate your new folder.

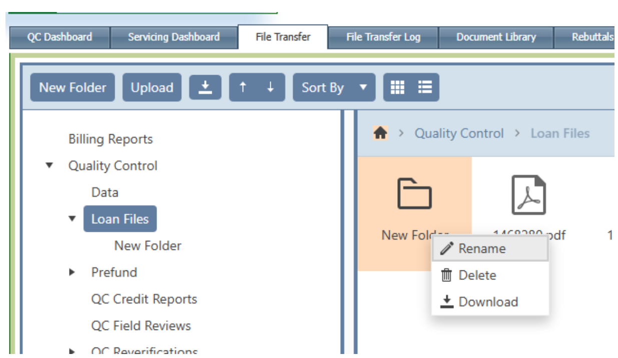


2. Select the **New Folder** button.

3. A new folder will be added to the selected location.

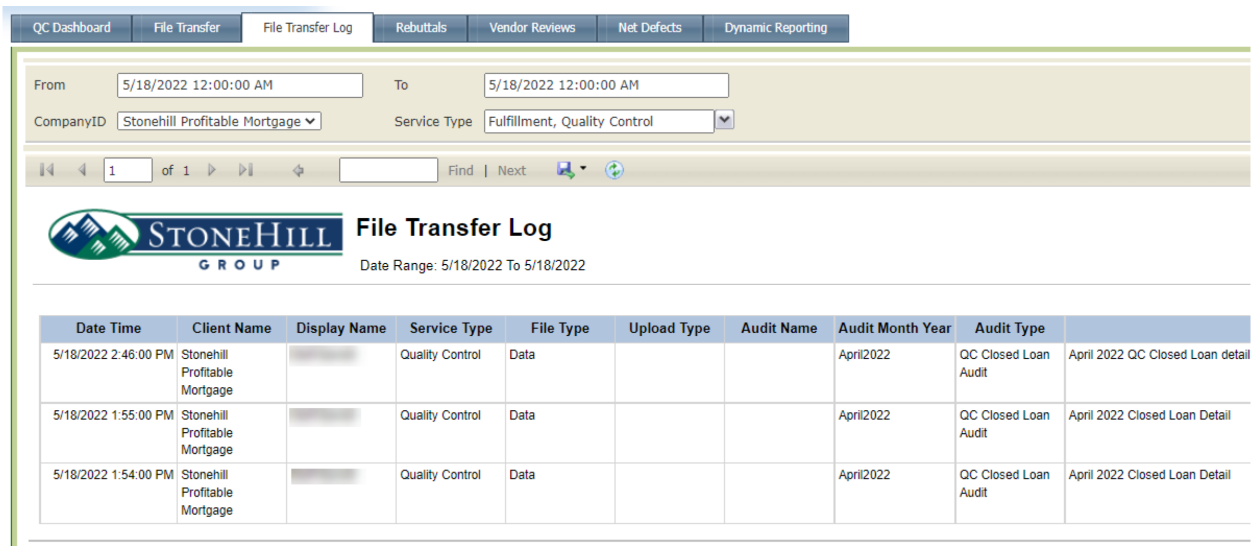


4. Right-clicking on a selected folder or file will allow you to ***rename***, ***delete*** or ***download*** the selected item.



File Transfer Log

To verify any uploads, click the “File Transfer Log” tab. This log is a record of communications between the Stonehill Group and our clients as it pertains to files uploaded to the Dashboard.



Date Time	Client Name	Display Name	Service Type	File Type	Upload Type	Audit Name	Audit Month Year	Audit Type	
5/18/2022 2:46:00 PM	Stonehill Profitable Mortgage		Quality Control	Data			April2022	QC Closed Loan Audit	April 2022 QC Closed Loan detail
5/18/2022 1:55:00 PM	Stonehill Profitable Mortgage		Quality Control	Data			April2022	QC Closed Loan Audit	April 2022 Closed Loan Detail
5/18/2022 1:54:00 PM	Stonehill Profitable Mortgage		Quality Control	Data			April2022	QC Closed Loan Audit	April 2022 Closed Loan Detail