

Loan Selling AdvisorSM is the Freddie Mac all-in-one solution for pricing, contracting, and loan delivery. This document lists various resources available on The Learning Center that show how to work with Loan Selling Advisor and/or Freddie Mac, and these icons show what form each resource takes:



Tutorial



Reference Tool



User Guide

Introduction

[Loan Selling Advisor Overview](#). Provides an overview of Loan Selling Advisor, including information on logging on, navigation, user profiles, user roles, and various resources.



[Loan Selling Advisor User Roles](#). Explains the various user roles available and the process for getting set up with those roles.



[Collateral Rep and Warranty Relief Information - Loan Selling Advisor](#). Explains when the various statuses for collateral representation and warranty relief are available, how to view them, and what impacts they have.



[Selling Mortgages to Freddie Mac for Cash User Guide](#). Step-by-step instructions on pricing, taking out contracts, creating loans, and more using cash contracts.



[Selling Mortgages to Freddie Mac Guarantor and MultiLender Swap User Guide](#). Step-by-step instructions on taking out contracts, creating loans, and more using Guarantor and MultiLender Swap contracts.



Cash Pricing and Contracting

[Best Efforts Commitment Option](#). Instructions on using the Modify Best Effort Import functionality, the data required to create a loan or contract using "Quick Loan," and other best practices with a Best Efforts Commitment.



[Cash Contract Data Fields](#). Data field definitions and requirements for entering data when creating all cash contracts: Servicing Retained, Cash-Released XChange, or WAC ARM.



[Servicing Released Premium Adjustment Guide](#): Identifies contract and loan data fields subject to SRP adjustments for mortgages sold through Cash-Released XChange.



[Request Cash Price Sheet](#): Tutorial highlights how to request Freddie Mac Price Sheets for Servicing Retained and Cash-Released XChange contracts, focusing on price sheet results and options.



[Cash-Released XChange Fundamentals](#): Tutorial highlights fundamentals of Cash-Released XChange process for mortgages sold servicing released. It focuses on the key steps for taking out a contract and contract fulfillment.



[WAC ARM Cash Contracts](#). Information and tips on selling and delivering Mandatory WAC ARM cash mortgages.



[Best Efforts Commitment Option](#). Information on taking out and fulfilling a Best Efforts Contract.



[Cash Contract Pair-Offs](#). A 5-minute tutorial defining a cash pair-off, which identifies the cash contract tolerance and options for pair-offs, as well as simulates the pair-off process.



[Purchase Contracts Overview](#). An overview of Freddie Mac purchase contracts and contract types, as well as a description of the contract life cycle.



Guarantor and MultiLender Swap Pricing and Contracting

[Additional Supplement \(OCS\) Timeline](#). A timeline to assist Sellers in getting Additional Supplement (OCS) information to Freddie Mac on time.



[Credit Fee in Yield Add-On Pricing](#). The details needed to implement the mandated Gfee, a fee for mortgages sold through the Guarantor and MultiLender Swap programs.



[Guarantor and MultiLender Contract Data Fields](#). Contains a listing of the Guarantor and MultiLender contract data fields and valid values, the section location, and a mapping between the Product Type and the Security Product Name.



[Guarantor Pricing and Contract Process](#). A tutorial overview of the Guarantor and MultiLender pricing and contract process that contains simulations of the functions you'll use, including importing a contract, using a rate sheet, manually creating a contract, and exporting data.



[Purchase Contracts Overview](#). A tutorial overview of Freddie Mac purchase contracts, contract types, and the contract life cycle.



[Loan Selling Advisor Early Funding Learning Clip](#) provides key points for the Early Funding Contract option available for Guarantor and MultiLender Pools. Learn tips for finalizing the contract and loan delivery.



Loan Data and the Uniform Loan Delivery Dataset (ULDD)

[Appraisal Data Integration from UCDP to Loan Selling Advisor](#). Describes the process to compare the appraisal data delivered in Loan Selling Advisor with the appraisal data in the Uniform Collateral Data Portal (UCDP).



[Export Your Loan Data](#). Step-by-step instructions on exporting your data.



[Allocating & Pricing Loans](#). Describes how to allocate loans to a contract and how to price those loans against the contract.



[Loan Selling Advisor Collateral Representation and Warranty Relief](#). Instructions on and a simulation of receiving a Collateral Representation and Warranty Relief decision.



[Create and Modify Loans](#). A tutorial about importing loans and manually entering loans.



[Evaluating Loans](#). A tutorial about evaluating loans.



[Loan Selling Advisor Tips for Resolving Delivery Edits](#). Information on purchase edits revised in accordance with the ULDD.



[ULDD: Tips for Bedroom Count and Property Dwelling Unit Eligible Rent Amount](#). Explains the Bedroom Count and Property Dwelling Unit Eligible Rent Amount data points.



[Validating Loan Product Advisor and Non-Loan Product Advisor Loans in Loan Selling Advisor](#). Guidance on troubleshooting and fixing critical error messages received for LP loans.



Loan Delivery

[Certification Prior to Allocation](#). Information on certifying loans before they are allocated to a contract.



[Delivery Standards for Cash](#). Provides standards for delivering cash contracts.





[Delivery Standards for Guarantor and MultiLender](#). Provides standards for delivering guarantor contracts.




Loan Delivery

[Documents Freddie Mac Requires for Certification of NY CEMA Deliveries](#). Identifies the documents needed for the certification of NY CEMA Deliveries. 

[Form 996E and Form 1034E Document Delivery Flow](#). Describes the flow of settlement documents 996E (Warehouse Provider Release and Transfer form) and 1034E (Custodial Certification Schedule) during the settlement process, highlighting the steps performed by the Seller, Warehouse Lender, Document Custodian, and Freddie Mac. 


[Form 996E Tips and Best Practices](#). Provides tips and best practices for entering settlement details, as well as building and using Form 996E. 

Funding/Settlement: All Executions

[Loan Selling Advisor Settlement/Funding Online Tool](#). Information about Settlement/Funding documents and their availability, as well as how the Total Disbursement is calculated. 


Funding/Settlement: All Executions: Guarantor and MultiLender Swap


[Freddie Mac Settlement Date Calendars](#). Various calendars that provide settlement dates. 


[Understanding the Daily ACH Process](#). Describes the Daily ACH (Automated Clearing House) process for mortgages sold under the Guarantor and MultiLender Swap Programs, which can assist Sellers in tailoring their settlement and reconciliation processes. 

Document Custodians

[Certifying Mortgages for Freddie Mac](#). Describes the process and options to certify loans. 

[Certifying Mortgages for Freddie Mac](#). Describes the methods of certifying a Note, as well as managing the loans during the process. 

[Document Custody Updates tutorial](#). Updates to document custody requirements, identifies Freddie Mac's Designated Custodians and more. 

[Document Custody Procedure Handbook](#). Provides Document Custodians with information necessary to facilitate the Document Custodian's process and to ensure timely and accurate certification. 

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