

Required & Recommended Fields for Upload

Below are the required and recommended fields to upload your client data. Please keep in mind, **your past clients and prospect import data must be in separate spreadsheets for proper import.**

FOR PAST CLIENTS/HOMEOWNERS

Required Fields (Don't have loan data? We'll pull it from public record!)

- First Name
- Last Name
- Email
- Property Address
- Property Zip

Add any additional property owner's contact information so they can receive Homebot too!

Required Fields to Upload Loan Data

We'll use your loan data in conjunction with the public record to populate the most accurate data:

- Total Loan Amount
- Interest Rate
- Loan Term (# of Months)
- Loan Purpose (Refi, Purchase, Etc)
- Closing Date
- NMLS Loan Originator ID
- NMLS Loan Type
- Lender NMLS ID

If you're an agent or don't have the loan details, Homebot will automatically pull loan data from public records.

Highly Recommended Fields

These are especially important if you are in **rural areas or non-disclosure states.**

- **Sold Price**
- **Appraised Value**

Recommended Fields:

- Insurance Policy Start Date
- DOBs (MM/DD/YYYY) to activate the [reverse mortgage module](#)
- Monthly Mortgage Insurance Premium
- Loan Number (can be used in the future when integrating with the Homebot API)



FOR PROSPECTS/BUYERS

Required Fields for Basic Import

- First & last name
- Email

Highly Recommended Fields

- Zipcodes of interest
- Max Loan Amount
- Downpayment
- Max Home Price
- Preapproved

Additional Fields Available

- Estimated Rate
- Loan Type
- Loan Term Months
- Loan Adjustable
- Loan ARM Years Initial
- Expires At