

Loan teams can now refresh assets in Blend whenever needed.

Refreshing Assets

The screenshot shows the Blend interface for a loan (Loan 120004). The 'Application' tab is selected. The 'Assets' section is highlighted with a red circle '1'. A 'Refresh Assets' button is highlighted with a red circle '2'. The interface shows details for Alice Firstimer, including her F score (710) and DU status (Available to run). The Assets section lists Institution #1 (U.S. Bank) and Account #1 (Checking, Current balance \$12,500, Last 4 of account number 2345).

1. Select the desired loan and navigate to the **Assets** section of the **Application Page**.
2. Click **Refresh Assets**.

The screenshot shows the 'Select accounts to refresh' dialog. It includes a warning message: 'We'll attempt to generate updated assets statements automatically. If we're unable to connect, we'll automatically issue a follow-up to request updated asset information from the borrower.' A table lists accounts with checkboxes for selection. Three accounts are selected (checked), and one is not (unchecked). A 'Refresh accounts (3)' button is highlighted with a red circle '4'.

	ACCOUNTS	STATUS	LAST REFRESHED	RESULT
<input checked="" type="checkbox"/>	U.S. Bank - Brokerage 6666 Alice Firstimer	Connected	—	—
<input checked="" type="checkbox"/>	U.S. Bank - Checking 2345 Alice Firstimer	Connected	—	—
<input checked="" type="checkbox"/>	U.S. Bank - Savings 2222 Alice Firstimer	Connected	—	—
<input type="checkbox"/>	CIT Bank - Checking Alice Firstimer	Not connected	Yesterday at 2:48PM	Follow-up issued (Account Statements)

3. Select the accounts to be refreshed.
4. Click **Refresh accounts** button.



Note: It may take a minute or two to refresh accounts.

Select accounts to refresh

We'll attempt to generate updated assets statements automatically. If we're unable to connect, we'll automatically issue a follow-up to request updated asset information from the borrower.

Name	Type	Borrower(s)	Shared With	Uploaded By	Document status
Firstimer - Generated Asset Stat...	Generated Ass...	Alice Firstimer	Alice Firstimer	system	25 minutes ago
Firstimer - Generated Asset Stat...	Generated Ass...	Alice Firstimer	Alice Firstimer	system	25 minutes ago
Firstimer - Generated Asset Stat...	Generated Ass...	Alice Firstimer	Alice Firstimer	system	25 minutes ago
Firstimer - W-2 - Blend - 2017	W-2	Alice Firstimer	Alice Firstimer	Alice Firstimer	16 days ago
Firstimer - W-2 - Blend - 2018	W-2	Alice Firstimer	Alice Firstimer	Alice Firstimer	16 days ago

[New statement available](#)

[New statement available](#)

5. Click **New statement available** link to view refreshed statement.
 - a. All updated asset statements will be uploaded to the Docs tab once available.

Select accounts to refresh

We'll attempt to generate updated assets statements automatically. If we're unable to connect, we'll automatically issue a follow-up to request updated asset information from the borrower.

ACCOUNTS	STATUS	LAST REFRESHED	RESULT
<input type="checkbox"/> U.S. Bank - Brokerage 6666 Alice Firstimer	a Connected ?	Just now	New statement available
<input type="checkbox"/> U.S. Bank - Checking 2345 Alice Firstimer	Connected ?	Just now	New statement available
<input type="checkbox"/> Wells Fargo Bank - Checking 1234 Alice Firstimer	b Locked ?	Just now	Follow-up issued (Account Statements)
<input type="checkbox"/> CIT Bank - Checking Alice Firstimer	c Not connected ?	Yesterday at 2:48PM	Follow-up issued (Account Statements)

6. You will see the following statuses for refreshed accounts:
 - a. **Connected** – Blend has refreshed the Generated Asset Statement for the last 2 months of data
 - b. **Locked** – Account needs additional authentication; a Follow-Up has been issued for the borrower to reconnect the account. Once completed, Blend will generate an updated statement for this account.
 - c. **Not connected** – Account was added manually; a Follow-Up has been issued for the borrower to upload updated account statements.

! Note: If the borrower did not connect to an account during the application process: In post-submission, you can issue a Follow-Up, which will ask the borrower to connect to their bank accounts or to upload bank statements. Once completed by the borrower, you will be able to refresh those accounts using Asset Refresh.