

B.O.L.T. UPDATE

New Condition Process



Benefits Of Update

- Streamline Your Condition Review Process
 - Easily identify what is uploaded for each Condition
 - Easy to track Conditions
- Reduce Time To Clear To Close

Status and Agents

Status

Current Status: Registered Status Date: 12/21/2018 Action: [view status certificate](#) [CHANGE LOAN STATUS](#)

Loan Open Registered Doc Check Funded

12/21/2018 12/21/2018

Agents

Assigned Agents in *TPO LQB Testing

Loan Officer re-assign	Processor assign
Name: Matthew Baker	Name:
Email: matthew.baker@mwfinc.com	Email:
Phone: (909) 793-1500	Phone:

Assigned Agents in Mountain West Financial, Inc.

LIVE CHAT

1. Within a loan, click “Conditions”.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (4)

Order Services

Conditions

REFRESH

Display Condition assigned to: **Anyone**Condition #SEARCH

Open Conditions

<input type="checkbox"/>	Status	Condition / Category	Subject	Supporting Documents	Due Date ^ / Assigned To
<input type="checkbox"/>	Active	9W9CPJH / PTD	ANTI-STEERING SIGNED BY ALL BORROWERS.	<div>Requirement: None</div> <div>Association: None</div> <div>upload</div> <div>associate previously uploaded</div>	12/31/2018 Matthew Baker
<input type="checkbox"/>	Active	9W9CPJJ / PTD	APPRAISAL ORDERED THROUGH BOLT.	<div>Requirement: Not Satisfied</div> <div>PROPERTY : APPRAISAL</div> <div>Association: None</div> <div>upload</div> <div>associate previously uploaded</div>	12/31/2018 Matthew Baker

LIVE CHAT

To Display All Conditions For The Loan

2-A. Choose “Anyone” in the “Display Conditioned Assigned To” dropdown.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (4)

Order Services

Conditions

REFRESH

Display Condition assigned to: Me

Condition #

SEARCH

SUBMIT TO CONDITION REVIEW

Open Conditions

<input type="checkbox"/>	Status	Condition / Category	Subject	Supporting Documents	Due Date / Assigned To
<input type="checkbox"/>	Active	9W9CPJH / PTD	ANTI-STEERING SIGNED BY ALL BORROWERS.	<div>Requirement: None</div> <div>Association: None</div> <div>upload</div> <div>associate previously uploaded</div>	12/31/2018 Matthew Baker
<input type="checkbox"/>	Active	9W9CPJJ / PTD	APPRAISAL ORDERED THROUGH BOLT.	<div>Requirement: Not Satisfied</div> <div>PROPERTY : APPRAISAL</div> <div>Association: None</div> <div>upload</div> <div>associate previously uploaded</div>	12/31/2018 Matthew Baker

To Display Conditions Only You, The Broker, Needs To Complete

2-B. Choose “Me” in the “Display Conditioned Assigned To” dropdown.

Status and Agents

Application Information

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Conditions (4)

Order Services

Conditions

REFRESH

Display Condition assigned to: Me

Condition #

SEARCH

Open Conditions

<input type="checkbox"/>	Status	Condition / Category	Subject	Supporting Documents	Due Date / Assigned To
<input type="checkbox"/>	Active	9W9CPJH / PTD	ANTI-STEERING SIGNED BY ALL BORROWERS.	<div>Requirement: None</div> <div>Association: None</div> <div>upload</div> <div>associate previously uploaded</div>	12/31/2018 Matthew Baker
<input type="checkbox"/>	Active	9W9CPJJ / PTD	APPRAISAL ORDERED THROUGH BOLT.	<div>Requirement: Not Satisfied</div> <div>PROPERTY : APPRAISAL</div> <div>Association: None</div> <div>upload</div> <div>associate previously uploaded</div>	12/31/2018 Matthew Baker

LIVE CHAT

3. Find the desired Condition.

Status and Agents

Application Information

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Loan Information

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Conditions (4)

Order Services

Conditions

REFRESH

Display Condition assigned to: Me

Condition #

SEARCH

Open Conditions

<input type="checkbox"/>	Status	Condition / Category	Subject	Supporting Documents	Due Date / Assigned To
<input type="checkbox"/>	Active	9W9CPJH / PTD	ANTI-STEERING SIGNED BY ALL BORROWERS.	<div>Requirement: None</div> <div>Association: None</div> <div>upload</div> <div>associate previously uploaded</div>	12/31/2018 Matthew Baker
<input type="checkbox"/>	Active	9W9CPJJ / PTD	APPRAISAL ORDERED THROUGH BOLT.	<div>Requirement: Not Satisfied</div> <div>PROPERTY : APPRAISAL</div> <div>Association: None</div> <div>upload</div> <div>associate previously uploaded</div>	12/31/2018 Matthew Baker

SUBMIT TO CONDITION REVIEW

LIVE CHAT

4. Click "Upload".

Status and Agents

Application Information

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Conditions (4)

Order Services

Conditions

SUBMIT TO CONDITION REVIEW

SEARCH

Due Date ^ / Assigned To

12/31/2018 Matthew Baker

12/31/2018 Matthew Baker

Upload Docs

Condition	Category	Subject	Required DocType
9W9CPJH	PTD	ANTI-STEERING SIGNED BY ALL BORROWERS.	None

Please select a document to upload and associate with this condition.

Application

SUZI BUILDER

Doc Type

DISCLOSURES : ANTI STEERING DISCLOSURE

change Doc Type

Document

CHOOSE FILE

No file chosen

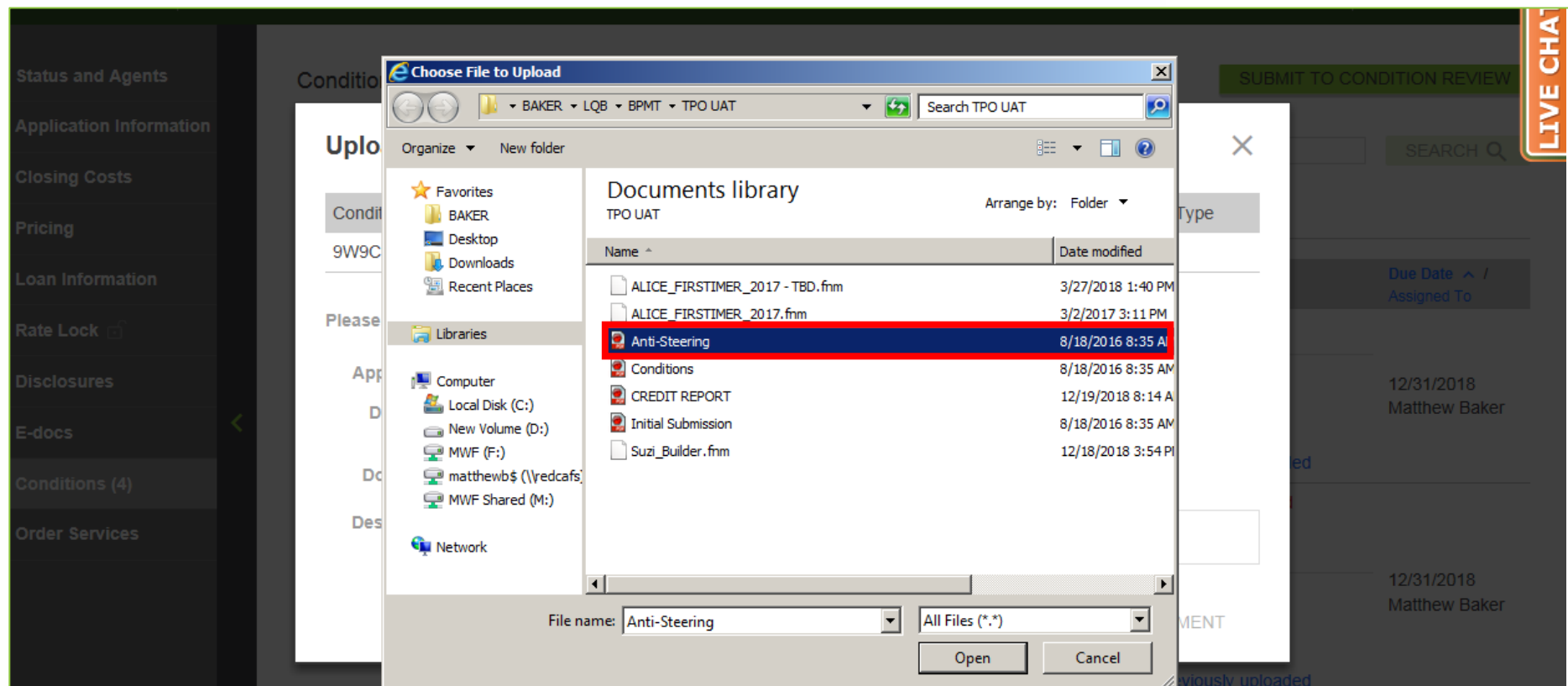
Description

CANCEL

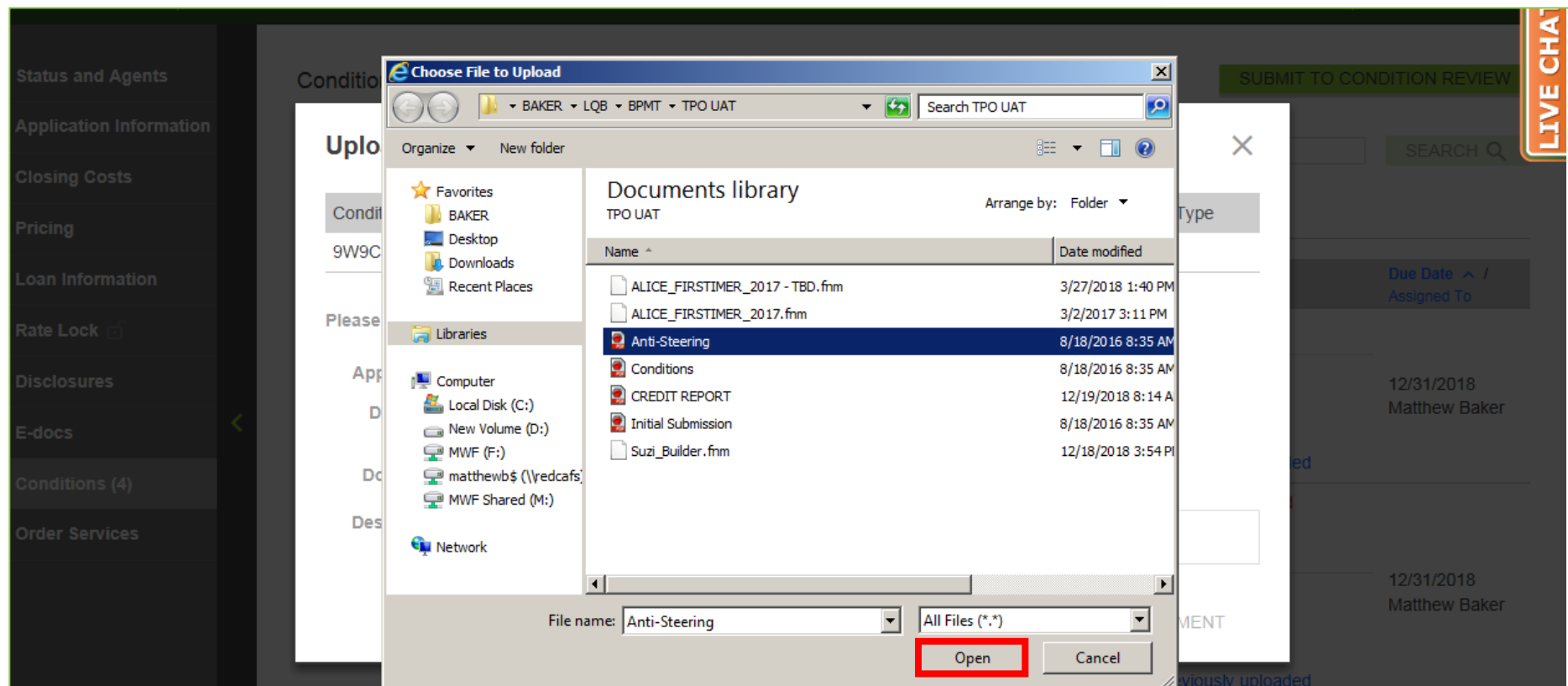
UPLOAD DOCUMENT

associate previously uploaded

5. Click “Choose File”.



6. Find and select the document to be associated to the Condition.



7. Click “Open”.

Status and Agents

Application Information

Closing Costs

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E-docs

Conditions (4)

Order Services

Conditions

SUBMIT TO CONDITION REVIEW

SEARCH

Due Date ^ / Assigned To

12/31/2018 Matthew Baker

12/31/2018 Matthew Baker

Upload Docs

Condition	Category	Subject	Required DocType
9W9CPJH	PTD	ANTI-STEERING SIGNED BY ALL BORROWERS.	None

Please select a document to upload and associate with this condition.

Application

SUZI BUILDER

Doc Type

DISCLOSURES : ANTI STEERING DISCLOSURE

change Doc Type

Document

CHOOSE FILE

Anti-Steering.pdf

Description

CANCEL

UPLOAD DOCUMENT

associate previously uploaded

8. Click “Upload Document”.

Status and Agents

Application Information

Closing Costs

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Conditions (4)

Order Services

Conditions

REFRESH

Display Condition assigned to: Me

Condition #

SEARCH

Open Conditions

<input type="checkbox"/>	Status	Condition / Category	Subject	Supporting Documents	Due Date / Assigned To
<input type="checkbox"/>	Active RESOLVE	9W9CPJH / PTD	ANTI-STEERING SIGNED BY ALL BORROWERS.	<div>Requirement: None</div> <div>Association:</div> <div> <div>unlink</div> <div>DISCLOSURES : ANTI STEERING DISCLOSURE</div> <div>upload</div> <div>associate previously uploaded</div> </div> <div>Requirement: Not Satisfied</div> <div>PROPERTY : APPRAISAL</div>	12/31/2018 Matthew Baker
<input type="checkbox"/>	Active RESOLVE	9W9CPJJ / PTD	APPRAISAL ORDERED THROUGH BOLT.	<div>Requirement: Not Satisfied</div> <div>Association: None</div>	12/31/2018 Matthew Baker

SUBMIT TO CONDITION REVIEW

LIVE CHAT

9. The document will now be associated to the Condition.

Status and Agents

Application Information

Closing Costs

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Conditions (4)

Order Services

Conditions

REFRESH

Display Condition assigned to: Me

Condition #

SEARCH

Open Conditions

<input type="checkbox"/>	Status	Condition / Category	Subject	Supporting Documents	Due Date / Assigned To
<input type="checkbox"/>	Active	9W9CPJH / PTD	ANTI-STEERING SIGNED BY ALL BORROWERS.	<div>Requirement: None</div> <div>Association:</div> <div> unlink </div> <div> upload </div> <div> associate previously uploaded </div>	12/31/2018 Matthew Baker
<input type="checkbox"/>	Active	9W9CPJJ / PTD	APPRAISAL ORDERED THROUGH BOLT.	<div>Requirement: Not Satisfied</div> <div>PROPERTY : APPRAISAL</div> <div>Association: None</div>	12/31/2018 Matthew Baker

LIVE CHAT

10. Repeat Step #3 to Step #8, for additional Conditions, if any.

Status and Agents

Application Information

Closing Costs

Pricing

Loan Information

Rate Lock

Disclosures

E-docs

Conditions (5)

Order Services

Conditions

FUNDING CONDITIONS

REFRESH

Display Condition assigned to: Me

Condition #

SEARCH

Open Conditions

<input type="checkbox"/>	Status	Condition / Category	Subject	Supporting Documents	Due Date / Assigned To
<input type="checkbox"/>	Active	9WCKJNF / PTD	ANTI-STEERING SIGNED BY ALL BORROWERS.	<div>Requirement: None</div> <div>Association: None</div> <div>upload</div> <div>associate previously uploaded</div>	12/31/2018 Matthew Baker
<input type="checkbox"/>	Active	9WCKJNG / PTD	APPRAISAL ORDERED THROUGH BOLT.	<div>Requirement: Not Satisfied</div> <div>PROPERTY : APPRAISAL</div> <div>Association: None</div>	12/31/2018 Matthew Baker

LIVE CHAT

If Uploading Funding Conditions

- Click "Funding Conditions" instead, once all Funding Conditions have been uploaded.



Important Information

- When the file is submitted to Condition Review, our BOLT Technicians will review and ensure all remaining Conditions are uploaded before they push the loan to Underwriting.
 - Please upload all Conditions prior to submitting to Condition Review, otherwise it will delay the review of your conditions.
- Turn times for Condition Review do vary, so please refer to posted Turn Times.



THANK YOU FOR VIEWING

For further B.O.L.T. Training, please visit <https://www.mwfwholesale.com>