

Import Loan

Import Loan File

* Indicates required fields

☒ Import Fannie Mae file

CHOOSE FILE No file chosen *

☐ I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. *

IMPORT

1. Click **Create New Loan**
2. Click **Import Loan File**
3. Click **Choose File**
4. Find The File And Click **Open**
5. Checkmark The Disclaimer Box
6. Click **Import**

Validate Credit

Please select an option

- ☐ Order New Credit Report
- ☐ Re-Issue Credit Report
- ☐ Upgrade Existing Credit Report to Tri-Merge Report
- ☒ Manually Enter Credit Report

Enter Credit

Revise Property & Loan Info

1. Click **Pricing Page**
2. Click **Application #1** Tab
3. Click Manually Enter Credit Report
4. Click **Enter Credit**
5. Enter Credit Scores
6. Click **Enter Credit**

Register Loan

Other Information

Underwriting Type ☐ Delegated ☒ Prior Approved

- 30 YR FIXED CONFORMING

+ pin register request lock	5.750	-3.042	1,400.57	32.768	5.750
+ pin register request lock	5.625	-2.595	1,381.58	32.514	5.625

1. Click **Property & Loan Info** Tab
2. Confirm **Prior Approved** Is Selected
3. Confirm All Other Data Is Accurate
4. Click **Price**
5. Find Your Preferred Rate And Product
6. Click **Register Or Request Lock**

Upload Documents

New Loan Submission

Additional Submission Documents

1. Click **E-Docs**
2. Click **Document Upload**
3. Click **New Loan Submission**
4. Click **Add Files**
5. Find The Files And Click **Open**
6. Click **Upload Files**

Submit Loan

DOCUMENT UPLOAD

SUBMIT TO DOCUMENT CHECK

LIVE CHAT

1. From The E-Docs Page, Click **Submit To Document Check**
2. Click OK

Upload Underwriting Conditions

Requirement: None

Association: None

TEST CONDITION

[associate previously uploaded](#)

Drag and Drop Files Here Files to Upload (Max 1)

OR SELECT FILES TO UPLOAD

[FOLLOW UP DATE](#) [EXPORT TO CSV](#) [EXPORT TO PDF](#)

1. Click **Conditions** Page
2. Select **Me** for Display Condition Assigned To
3. Find the Preferred Condition
4. Drag And Drop The Files To That Condition
5. Repeat Steps For Additional Conditions
6. Click **Submit To Condition Review**

Request Lock

- 30 YR FIXED CONFORMING						
+ pin register request lock	5.750	-3.042	1,400.57	32.768	5.750	
+ pin register request lock	5.625	-2.595	1,381.58	32.514	5.625	
+ pin register request lock	5.500	-2.596	1,362.69	32.263	5.500	
+ pin register request lock	5.375	-2.281	1,343.93	32.012	5.375	
+ pin register request lock	5.250	-1.964	1,325.29	31.764	5.250	

1. Click **Property & Loan Info** Tab
2. Review Rate Lock Period
3. Review Impounds
4. Click **Price**
5. Find Your Preferred Rate And Product
6. Click **Request Lock**

Upload Complete Loan Package/Submit To Purchase Review

Purchase Conditions

1. Click **E-Docs**
2. Click **Document Upload**
3. Click **Purchase Conditions**
4. Click **Add Files**
5. Find The Files And Click **Open**
6. Click **Upload Files**