



How to Upload Conditions and Access Documents Guide

Step: 1

- After logging into the portal, click on your **'PIPELINE'** this is where you can access all loans you have with Jet Mortgage.
- After clicking into the desired loan, you will see the screen to the right. Here you can click into the desired tab as needed in the blue column.
- **Status and Agents** will provide you with the current status of the loan and contacts assigned to the loan.
- **E-docs** tab will allow you to search for ANY document that has been uploaded to the file.
- **Conditions** will allow you to view all conditions needed on the loan.

Once you are inside the loan click on **Conditions** tab near the bottom left.

The screenshot shows a loan management interface. At the top, a dark blue header contains the 'Pipeline' logo and loan details: Loan Number: UN121110477, Borrower Name: Alice Firsttime, Loan Amount: \$408,500.00, DTI: 42.537%, and LTV: 95.000%. On the left, a light blue sidebar lists various tabs: Status and Agents, Application Information, Closing Costs, Pricing, Loan Information, Rate Lock, Disclosures, E-docs, Tasks (1), Conditions (0), and Order Services. The 'Conditions (0)' tab is highlighted with a red box, and a red arrow points from it to the main content area. The main content area is titled 'Status and Agents' and shows the loan's current status as 'Registered' with a status date of 11/15/2021. A green progress bar indicates the loan's history: 'Loan Open' starting on 11/13/2021 and 'Registered' starting on 11/15/2021. Below the status section, there are two sections for 'Assigned Agents'. The first section, 'Assigned Agents in JET Mortgage', lists 'Loan Officer re-assign' and 'Processor assign' with fields for Name, Email, and Phone. The second section, 'Assigned Agents in HOME MORTGAGE ALLIANCE CORP (HMAC)', lists 'Processor' and 'Underwriter' with fields for Name, Email, and Phone.

Step: 2

- To upload a document you can do one of two ways. You can 'DRAG AND DROP FILES HERE' or you can 'SELECT FILES TO UPLOAD' from your desktop.
- Once you have selected the document, you can then LABEL the document by SLECTING DOC TYPE.


Upload Docs

Fax Docs

Document List

You may upload up to 12 documents at a time with a total upload size of 100MB.

Jet_How to Upload Conditions and Access Document



Drag and Drop Files Here to Upload

OR SELECT FILES TO UPLOAD

1 of 12 files selected for upload

File Name	Doc Type *	Description
Jet_How to Upload Conditions and Access Documents Guide 0423.pdf	[select Doctype] scan barcodes	<input type="text"/> 0 of 200 characters

Step : 2 Con t.

- Click on 'SELECT DOC TYPE' and search unclassified.

Select a Doc Type



Search for:

SEARCH


Matching Doc Types:

Doc Type	Folder
UNCLASSIFIED	UNCLASSIFIED
BORROWER UPLOAD	UNCLASSIFIED
FLOOD CERTIFICATION	UNCLASSIFIED
IDXPRESS REPORT	UNCLASSIFIED
UNASSIGNED DOCUMENT TYPE	UNCLASSIFIED

Step: 2 Cont.

- Once the Doc Type has been selected you will be taken back out to the 'Upload Docs' screen
- Here you can add and additional description in the highlighted box (any notes you think will help your Account Manager or UW).
- Once done click 'UPLOAD DOCUMENT'

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File Name	Doc Type *	Description
Jet_How to Upload Conditions and Access Documents Guide 0423.pdf	[select Doctype] scan barcodes UNCLASSIFIED : UNCLASSIFIED	<input type="text"/> 0 of 200 characters

UPLOAD DOCS

Step 3

Lastly, Send an email to your AE and AM alerting them that the file is ready for review