

Instructions for Loan Registration and Document Upload

Version 1.2

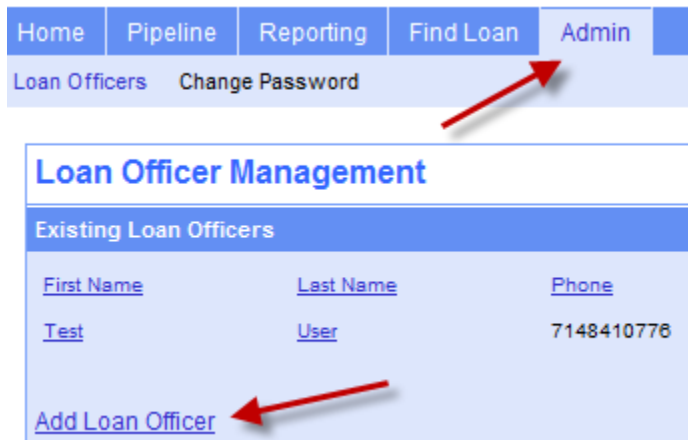
Contents

- I. First Time User Requirements
- II. Loan Registration
- III. Document Upload
- IV. Notifying Submission Desk

I. First Time User Requirements

Before registering your first loan, these requirements are needed:

- Internet Explorer 6.0 or greater
- An LO user account. You can setup the account by selecting the Admin tab and selecting Loan Officer. For the first LO, you can add yourself. Please note that a different email address than what you have under your main broker ID account.



The screenshot shows a web application interface. At the top, there is a navigation bar with tabs: Home, Pipeline, Reporting, Find Loan, and Admin. Below the navigation bar, there are links for "Loan Officers" and "Change Password". A red arrow points to the "Admin" tab. Below the navigation bar, there is a section titled "Loan Officer Management". Under this section, there is a sub-section titled "Existing Loan Officers". This sub-section contains a table with three columns: "First Name", "Last Name", and "Phone". The table has one row with the following values: "Test", "User", and "7148410776". Below the table, there is a link labeled "Add Loan Officer". A red arrow points to this link.

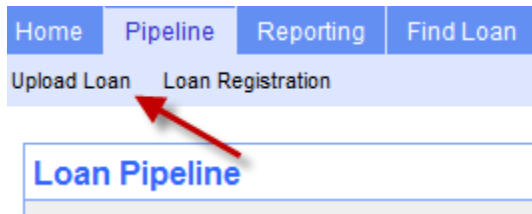
<u>First Name</u>	<u>Last Name</u>	<u>Phone</u>
<u>Test</u>	<u>User</u>	7148410776

[Add Loan Officer](#)

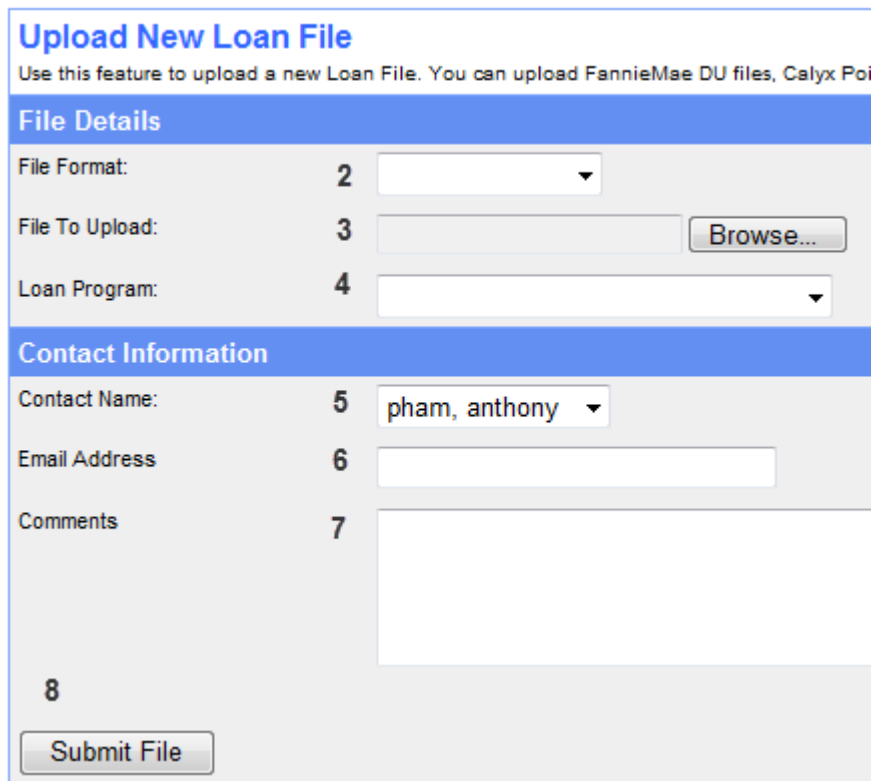
II. Loan Registration

You can register your loan by uploading a loan file from a supported format.

1. Log into WebTrac and access the pipeline tab. Select Upload Loan.



2. Select the file format from the drop down list. Please view the image below.
3. Browse and select the appropriate loan file. If you are uploading a Calyx Point and have multiple borrowers, an additional field will populate below File To Upload. This field allows you to upload co-borrower files.
4. Select the loan program from the drop down list.
5. Select a contact name. This will be either the loan officer or broker.
6. Enter your e-mail address.
7. You may enter comments.
8. Click Submit File. The loan will be uploaded with the “Registered” status. You will be given a loan number at



The image shows a form titled 'Upload New Loan File'. Below the title is a subtitle: 'Use this feature to upload a new Loan File. You can upload FannieMae DU files, Calyx Poi'. The form is divided into two main sections: 'File Details' and 'Contact Information'.
In the 'File Details' section, there are three rows:
1. 'File Format:' with a dropdown menu, labeled with a '2' to its left.
2. 'File To Upload:' with a text input field and a 'Browse...' button, labeled with a '3' to its left.
3. 'Loan Program:' with a dropdown menu, labeled with a '4' to its left.
In the 'Contact Information' section, there are three rows:
1. 'Contact Name:' with a dropdown menu showing 'pham, anthony', labeled with a '5' to its left.
2. 'Email Address' with a text input field, labeled with a '6' to its left.
3. 'Comments' with a large text area, labeled with a '7' to its left.
At the bottom of the form, there is a 'Submit File' button, labeled with an '8' to its left.

this time.

9. You have successfully uploaded your loan!

III. Document Upload

1. In WebTrac, select the pipeline tab. Click on the + sign to expand the appropriate loan status group. Click the

Loan Pipeline

Loan Officer:
ALL

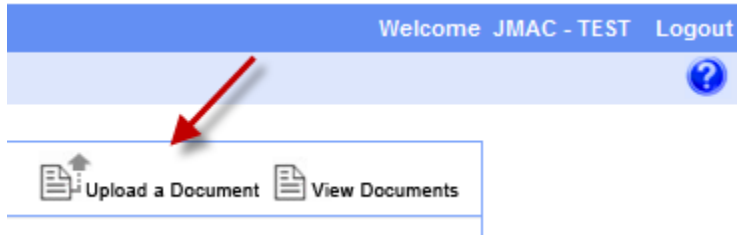
User: JMAC - TEST
Date Range: 3/16/2010 to 7/14/2010
Search By: Last Changed Date

Loan Status

UW Received
 Approved
 Total Active Loans

loan number or borrower name to open the Loan Details page.

2. On the top right, click Upload a Document.



3. A new browser window will appear to upload documents. The upload screen has three sections:
- a. File Information
 - b. Assign to Loan
 - c. Document Information

Document Upload

File Information

File To Upload Browse...

Upload in Color

Assign to Loan

Loan Number:

Borrower:

Property:

Document Information

Document Type

4. Under the file information section, browse for the file you would like to upload. Do not select Upload in Color unless the document is specifically an Appraisal or color is absolutely necessary. Though there are more formats, we only support PDF.
5. The second section, assign to loan, will automatically have your borrower information.
6. On the last section, document information, you can select your document type. The document types that are CAPITALIZED are the ones that you should upload to. If you are unsure or have a multi document type file, please select UNFILED.

The image shows a screenshot of a web form titled "Document Information". A dropdown menu is open for the "Document Type" field. The menu lists several options in all caps: UNFILED, BROKER UNDERWRITING CONDITIONS, BROKER FUNDING CONDITIONS, BROKER SUBMISSION SHEET, BROKER 1008 INITIAL, BROKER 1003/1008 TYPED, and BROKER 1003 INITIAL. The "UNFILED" option is currently selected and highlighted in blue.

IV. Notifying the Submission Desk

1. Once all the required submission documents have been uploaded, please email submissions@jmaclending.com and CC your AE the following information:
 - a. Loan Number
 - b. Stating that you are ready to submit your loan.
2. You will be receiving an email later in the day on whether your submission has been accepted or rejected. Your loan status will change from Registered to Submitted once it has been accepted.
3. Once the loan has been submitted, underwriting conditions should be uploaded to BROKER UNDERWRITING CONDITIONS and funding conditions be uploaded to FUNDING CONDITIONS. If the upload does not pertain to these categories, please upload to UNFILED.