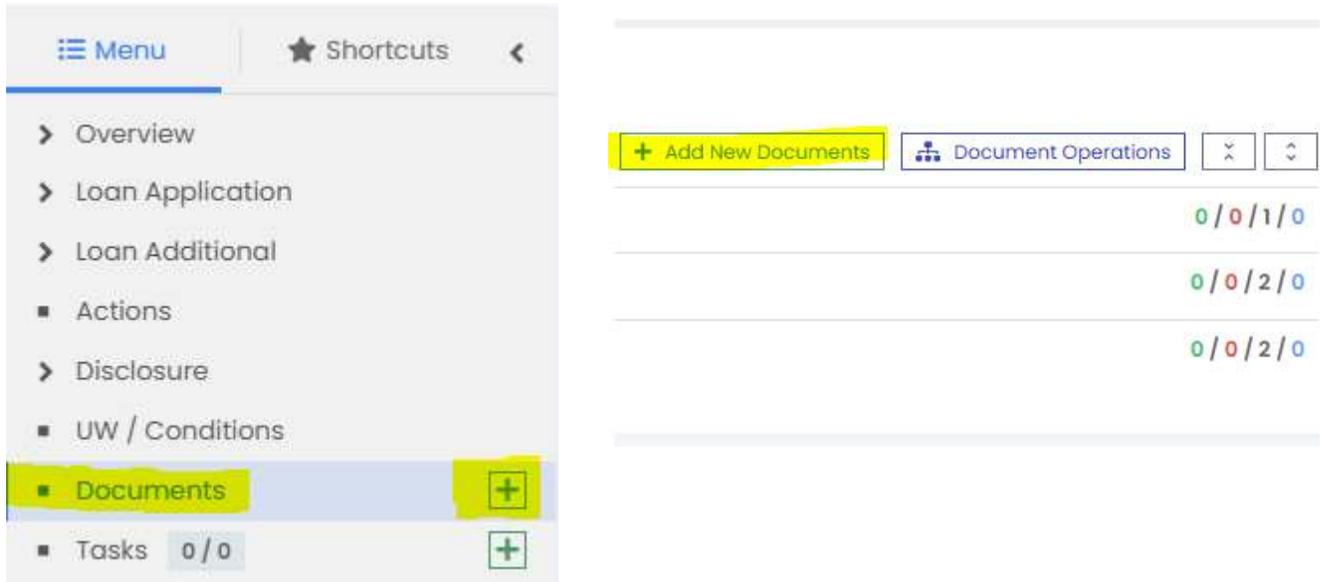
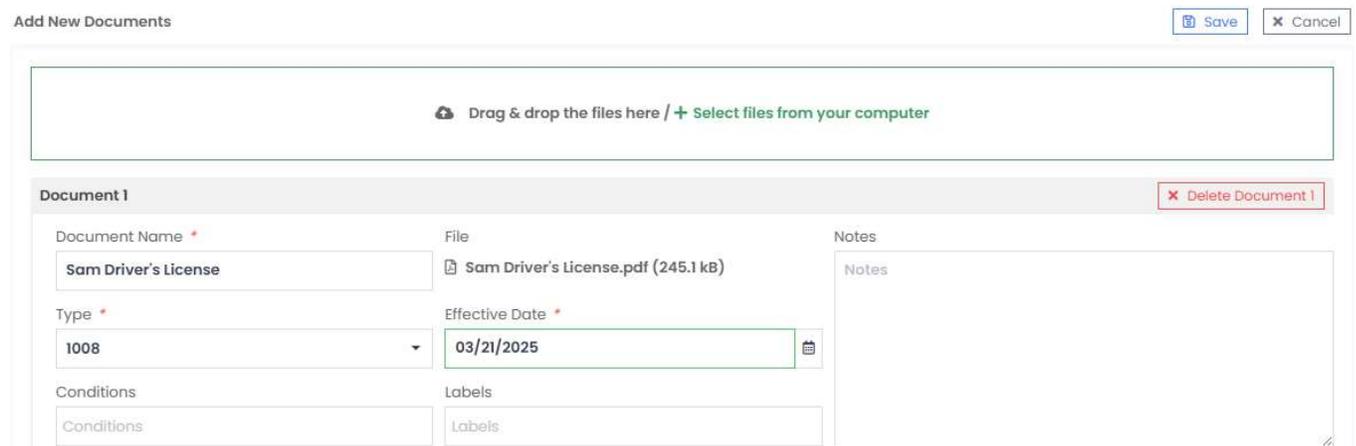


Uploading Documents and Underwriting Conditions

Step 1: Open the loan and navigate to the *Documents* tab. Select the *+Add New Documents* button to open the document upload menu (see below):



Step 2: On the next screen, drag and drop a document or multiple documents into the box, or press *Select files from your computer*.



Step 3: For each document, there are a few options you can select before pressing Save to complete the upload. You can rename the document or change the effective date. You can also select the *Type* dropdown to organize the document(s) into folders such as income, credit, etc. Finally, you can select a corresponding underwriting condition under the *Conditions* dropdown to attach the file to a specific condition (see below). Press Save at the top right when finished.

Add New Documents Save Cancel

Drag & drop the files here / + Select files from your computer

Document 1 Delete Document 1

| | | |
|---|--|--|
| Document Name * <input type="text" value="Sam Driver's License"/> | File <input type="text" value="Sam Driver's License.pdf (245.1 kB)"/> | Notes <div style="border: 1px solid #ccc; height: 80px;"></div> |
| Type * <input type="text" value="1008"/> | Effective Date * <input type="text" value="03/21/2025"/> | |
| Conditions <div style="border: 1px solid #ccc; padding: 5px;"><p>PRIOR TO CLOSING</p><ul style="list-style-type: none"><input type="checkbox"/> Income<input checked="" type="checkbox"/> IRS 1040 transcripts for years: 2024/2023 / 2022 -Everstream to order<input type="checkbox"/> REO<input type="checkbox"/> Current mortgage statement</div> | Labels <input type="text" value="Labels"/> | |