

Non-Delegated Quick Start Guide

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JMAC LENDING QUICK Sta	rt Guide				
Import Loan					
 Import Fannie Mae file Browse I understand that applicants' Social Security Numbers may be stored and potentially visible to other users. Import 	 Click Create New Loan Click Import Ioan file Browse to select a <i>Fannie Mae 3.2 file</i> Check the box to acknowledge the disclaimer 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	 Click Pricing page Click Application #1 tab Click Manually Enter Credit Report Click Enter Credit Enter the borrower(s) credit scores Click Enter Credit to save 				
Register Loan					
Other Information Underwriting Type Delegated Prior Approved Eligible Loan Programs RATE POINT PAYMENT 30 YR FIXED CONFORMING in register request lock 4.500 -4.000 1,672.06 Image: pin register request lock 4.500 -4.000 1,672.06 Image: pin register request lock 4.250 -3.125 1,623.40	 Click Property & Loan Info tab to confirm Prior Approved as the Underwriting Type Choose your preferred Terms, Amortization Type and Product Type Click Price Choose a Secondary agent Find your preferred rate and product Click Register or Request Pre-Lock 				
Upload Subm	ission Docs				
Select a Doc Type Search for: Search Folders > NON-DELEGATED CORRESPONDENT UPLOAD	 Click Edocs page Click Select Doc Type 				

- 3. Choose Non-Delegated Correspondent Upload
- 4. Choose Correspondent Submission Package
- 5. Browse to select a document
- 6. Click Add Doc to upload multiple documents
- 7. Click Upload

Doc Туре

1 CORRESPONDENT SUBMISSION PACKAGE

5 COMPLETE LOAN PACKAGE FOR PURCHASE REVIEW

2 UNDERWRITING CONDITIONS

3 COLOR APPRAISAL & UCDP 4 CLOSING DOC ORDER FORM

6 SUSPENSE CONDITIONS

7 TRAILING DOCS

Submit Loan

Open Tasks				
	Status	Category	Subject 🔺	
	Active			
Resolve	Submit: Cancellation Request			
	Active		Culture to Long Declares Decide for Culture to 1	
	Resolve		Submit: Loan Package Ready for Submission	

- 1. Click Tasks page
- 2. Click **Resolve** next to *Submit: Loan Package Ready for Submission*

Upload Underwriting Conditions

Select a Do	ос Туре			
Search for:		Search		
Folders > N	ON-DELEGATED CORRESP	PONDENT UPLOAD		
Doc Туре				
1 CORRE	SPONDENT SUBMISSIO	N PACKAGE		
2 UNDERWRITING CONDITIONS				
3 COLOR APPRAISAL & UCDP				
4 CLOSING DOC ORDER FORM				
5 COMPLETE LOAN PACKAGE FOR PURCHASE REVIEW				
6 SUSPENSE CONDITIONS				
7 TRAILING DOCS				
7 TRAILI	NG DOCS			

- 1. Click Edocs page
- 2. Click Select Doc Type
- 3. Choose Non-Delegated Correspondent Upload
- 4. Choose Underwriting Conditions or Color Appraisal & UCDP
- 5. Browse to select a document
- 6. Click Add Doc to upload multiple documents
- 7. Click Upload

Submit Underwriting Conditions

Open Tasks			
	Status	Category	Subject 🛦
	Active Resolve		Submit: Underwriting Conditions Ready for Review
	Active Resolve		Submit: Loan Package Ready for Submission

- 1. Click Tasks page
- 2. Click **Resolve** next to *Submit: Underwriting Conditions Ready for Review*

Request Lock

Eligible Loan Programs		RATE	POINT	PAYMENT
30 YR FIXED CONFORMING				
pin	<u>request lock</u>	4.625	-4.000	2,056.56
pin	request lock	4.500	-3.500	2,026.74
pin	request lock	4.375	-2.750	1,997.14
pin	request lock	4.250	-2.250	1,967.76

- 1. Click Pricing page
- 2. Click **Property & Loan Info** tab to review the *Lock Period* and *Impounds*
- 3. Click Price
- 4. Find your preferred rate
- 5. Click Request Lock

P

(Optional) Upload Closing Doc Order Form

Select a Doc Type				
Search for:	Search			
Folders > NON-DELEGATED CORRES	PONDENT UPLOAD			
Doc Туре				
1 CORRESPONDENT SUBMISSIO	ON PACKAGE			
2 UNDERWRITING CONDITIONS				
3 COLOR APPRAISAL & UCDP				
4 CLOSING DOC ORDER FORM				
5 COMPLETE LOAN PACKAGE FOR PURCHASE REVIEW				
6 SUSPENSE CONDITIONS				
7 TRAILING DOCS				

- 1. Click Edocs page
- 2. Click Select Doc Type
- 3. Choose Non-Delegated Correspondent Upload
- 4. Choose Closing Doc Order Form
- 5. Click Add Doc to upload multiple documents
- 6. Click Upload

(Optional) Request JMAC to Draw Closing Docs



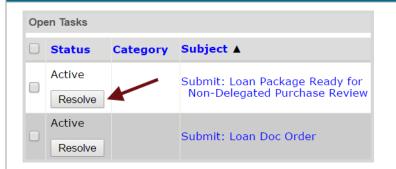
1. Click Tasks page

2. Click **Resolve** next to the *Submit: Loan Doc Order*

Upload Complete Loan Package & Docs

Select a Do	ос Туре					
Search for:		Search				
Folders > N Doc Type	Folders > NON-DELEGATED CORRESPONDENT UPLOAD					
1 CORRE	SPONDENT SUBMISSIO	N PACKAGE				
2 UNDERWRITING CONDITIONS						
3 COLOR APPRAISAL & UCDP						
4 CLOSING DOC ORDER FORM						
5 COMPLETE LOAN PACKAGE FOR PURCHASE REVIEW						
6 SUSPENSE CONDITIONS						
7 TRAILING DOCS						

- 1. Click Edocs page
- 2. Click Select Doc Type
- 3. Choose Non-Delegated Correspondent Upload
- 4. Choose Complete Loan Package For Purchase Review
- 5. Browse to select a document
- 6. Click Add Doc to upload multiple documents
- 7. Click **Upload**



Submit for Purchase Review

- 1. Click Tasks page
- 2. Click **Resolve** next to *Submit: Loan Package for Non-Delegated Purchase Review*

Upload Suspense Conditions

Select a Doc Type	1. Click Edocs page
Search for: Search	2. Click Select Doc Type
Folders > NON-DELEGATED CORRESPONDENT UPLOAD Doc Type 1 CORRESPONDENT SUBMISSION PACKAGE	 Choose Non-Delegated Correspondent Upload
2 UNDERWRITING CONDITIONS 3 COLOR APPRAISAL & UCDP	 Choose Complete Loan Package For Purchase Review
4 CLOSING DOC ORDER FORM 5 COMPLETE LOAN PACKAGE FOR PURCHASE REVIEW	5. Browse to select a document
6 SUSPENSE CONDITIONS	6. Click Add Doc to upload multiple documents
7 TRAILING DOCS	7. Click Upload
Submit Suspens	se Conditions

O	pen Tasks			
	Status	Category	Subject ▲	1 0
	Active Resolve		Submit: Suspense Conditions Ready for Review	1. Cl 2. Cl <i>Cl</i>
	Active Resolve		Submit: Loan Doc Order	

1.	Click	Tasks	page
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lick **Resolve** next to *Submit: Suspense* Condition Ready for Review

Upload Trailing Docs

Select a Do	ос Туре			
Search for:		Search		
Folders > N Doc Type	ION-DELEGATED CORRES	PONDENT UPLOAD		
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- 3. Choose Non-Delegated Correspondent Upload
- 4. Choose Trailing Docs
- 5. Browse to select a document
- 6. Click Upload