

NexBank B2B Navigation & Loan Submission

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General Navigation

mortgage.nexbank.com

NEXBANK™

February 20, 2019

Username Password Sign In

Forgot Your Password? Login Help

Home Company Directory

EXECUTION. FLEXIBILITY. EXPERTISE.

Get Approved
About Us
Contact Us

Did you know
NexBank offers Reduced Doc Jumbo Mortgages
at an exceptional rate

2515 McKinney Ave, Ste 1700
Dallas, TX 75201
(877) 934-4852



NexBank B2B Homepage

Sign In Section

The screenshot displays the NexBank B2B homepage. At the top left is the NexBank logo. To its right, the date "February 20, 2019" is shown. The sign-in section, highlighted with a red box, includes a "Username" input field with a person icon, a "Password" input field with an asterisk icon, and a "Sign In" button with a right-pointing arrow. Below the sign-in fields are links for "Forgot Your Password?" and "Login Help". A dark blue navigation bar contains "Home" and "Company Directory" links. The main content area features a large image of a city at night and a sidebar with links for "Get Approved", "About Us", and "Contact Us". A promotional banner at the bottom right states "Did you know NexBank offers Reduced Doc Jumbo Mortgages".

NexBank B2B Homepage

Forgot/Reset Password link

The screenshot displays the NexBank B2B homepage. At the top left is the NexBank logo. To its right, the date "February 20, 2019" is shown. Further right are input fields for "Username" and "Password", followed by a "Sign In" button. Below the password field, a red box highlights the "Forgot Your Password?" link, with "Login Help" positioned to its right. A dark navigation bar below the login area contains "Home" and "Company Directory" links. The main content area features a large image of a city at night. On the right side, there is a vertical menu with "Get Approved", "About Us", and "Contact Us" links. Below this menu is a promotional banner that reads "Did you know NexBank offers Reduced Doc Jumbo Mortgages".



Start New Loan Upload Wizard



Welcome: **Robert Test** [Logout](#)

- [Home](#)
- [Resource Center](#)
- [News Flashes](#)
- [Company Directory](#)

Status	# Loans	\$ Volume
Application	3	900,000
Registered	1	300,000
Setup Received	1	300,000

[Show Printable](#)

Reports Available

[Lock Expiration Report](#)

[Pipe Report](#)

[📄 UPLOAD LOAN](#)

Current Turn Times

Setup	1 Day
Underwriting	1 Day
Conditions	1 Day
Closing Disclosure	1 Day
Funding Review	30 Minutes
Pre-Purchase Review	3 Days

NexBank Holiday Schedule

Monday, May 27th *Memorial Day, our office will be closed*

News

10182018 - Conventional Product Matrix Update

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[📅 Holiday Schedule](#)

[👤 About Us](#)

[📞 Contact Us](#)

🔍 Loan Search



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Receive an extra 0.250%
in price on all CHR30 Loans

Hugh Sinclair
Account Executive

📍 2515 McKinney Avenue Dallas,
TX 75201

📞 (425)802-2660



View Loans By Status



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- [Company Directory](#)

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View Reports of Loan Activity



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Status	# Loans	\$ Volume
Application	3	900,000
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[Show Printable](#)

Reports Available

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[UPLOAD LOAN](#)

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Search by Last Name or Loan#



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Resource Center



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News Flashes



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- [News Flashes](#)**
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🔍 Loan Search

<input type="text" value="Enter Loan Number"/>	<input type="button" value="🔍"/>
<input type="text" value="Enter Last Name"/>	<input type="button" value="🔍"/>

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✉



Company Directory



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Helpful Links



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Loan Search

Enter Loan Number

Enter Last Name

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Account Executive Contact Info



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Loan Level View


Welcome: **Robert Test** [Logout](#)

[Home](#) [Resource Center](#) [News Flashes](#) [Company Directory](#)

Loan Number 64001209, John Sample **Floating**

✓ Registered 02/18/2019	Setup Received	Submitted to UW	Approved with Conditions	Early CD Eligible	UW Final Approved	Funded
----------------------------	----------------	-----------------	-----------------------------	-------------------	-------------------	--------

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

←

- [Loan Details](#)
- [DU Retrieval](#)
- [Pricing/Lock](#)
- [Upload / Conditions](#)
- [Submit Loan](#)
- [Get Forms / Files](#)
- [Messages](#)

→

Loan Details

Borrower

Name:	John Sample	Citizenship:	U.S. Citizen
Occupancy:	Owner	Marital Status:	Married

Subject Property

Street:	15 Sandstone Ct	Property Type:	Single Family Dwelling
City, St Zip:	San Rafael CA 94901	Units:	1

Loan Information

Loan Program:	Conf Fixed 30	Rate:	5.125%
Loan Purpose:	Purchase	Lock Status:	Floating
Loan Amount:	\$300,000.00	Ratios:	14.60% / 35.88%
Base Loan:	\$300,000.00	Haz Impounds:	Yes
LTV/CLTV:	75.00% / 75.00%	Tax Impounds:	Yes
MI Coverage:	0.00%	Agency Case Number:	

[Merge a Loan](#)

Frequently Requested Info

- [Holiday Schedule](#)
- [About Us](#)
- [Contact Us](#)

Loan Search

Receive an
extra 0.125% in price
on all **Conventional Fixed**
Rate Loans with a 720+ FICO

Status Ribbon

The status ribbon will display milestones toward the funding and purchasing of your loan based on the loan channel and options you have requested.

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Loan Number 64001209, John Sample **Floating**

✓ Registered 02/18/2019	Setup Received	Submitted to UW	Approved with Conditions	Early CD Eligible	UW Final Approved	Funded
----------------------------	----------------	-----------------	-----------------------------	-------------------	-------------------	--------

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

← Loan Details DU Retrieval Pricing/Lock Upload / Conditions Submit Loan Get Forms / Files Messages →

Next Steps Help

The steps in this text box tell you what to do next to get your loan moved to the next milestone in the status bar.

In this case, the next step would be to click on the Pricing/Lock Tab and price our loan with the pricing engine.

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Loan Number 64001209, John Sample Floating

✓ Registered 02/18/2019	Setup Received	Submitted to UW	Approved with Conditions	Early CD Eligible	UW Final Approved	Funded
----------------------------	----------------	-----------------	-----------------------------	-------------------	-------------------	--------

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

← Loan Details DU Retrieval **Pricing/Lock** Upload / Conditions Submit Loan Get Forms / Files Messages →

Navigation Tabs

The Tabs are sorted in the order you need to complete the steps to get your loan submitted and funded.

Once you complete a step make sure to refresh your screen by pressing F5 or the recycle button to update the text for your next steps.

The screenshot displays a loan management interface for a loan with number 64001209, owned by John Sample. The interface includes a progress bar with seven steps: Registered (02/18/2019), Setup Received, Submitted to UW, Approved with Conditions, Early CD Eligible, UW Final Approved, and Funded. Below the progress bar, a message instructs the user to price the loan, save to LOS, or lock it in to establish the loan program and retrieve AUS Findings or Credit. A navigation bar is highlighted with a red box, containing tabs for Loan Details, DU Retrieval, Pricing/Lock, Upload / Conditions, Submit Loan, Get Forms / Files, and Messages. Below the navigation bar, the 'Loan Details' section is visible, showing the borrower's name as John Sample and their citizenship as U.S. Citizen.

Loan Number 64001209, John Sample Floating

✓ Registered 02/18/2019	Setup Received	Submitted to UW	Approved with Conditions	Early CD Eligible	UW Final Approved	Funded
----------------------------	----------------	-----------------	-----------------------------	-------------------	-------------------	--------

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

Navigation Tabs: < Loan Details DU Retrieval Pricing/Lock Upload / Conditions Submit Loan Get Forms / Files Messages >

Loan Details

Borrower			
Name:	John Sample	Citizenship:	U.S. Citizen

Update loan data (merge loan)

If you need to update your loan file after your initial pricing/disclosure, just navigate to the “Loan Details” screen and click the “Merge A Loan” button

Navigation: Loan Details | DU Retrieval | Pricing/Lock | Upload / Conditions | Submit Loan | Get Forms / Files | Messages

Loan Details

Borrower			
Name:	John Sample	Citizenship:	U.S. Citizen
Occupancy:	Owner	Marital Status:	Married

Subject Property			
Street:	15 Sandstone Ct	Property Type:	Single Family Dwelling
City, St Zip:	San Rafael CA 94901	Units:	1

Loan Information			
Loan Program:	Conf Fixed 30	Rate:	5.125%
Loan Purpose:	Purchase	Lock Status:	Floating
Loan Amount:	\$300,000.00	Ratios:	14.60% / 35.88%
Base Loan:	\$300,000.00	Haz Impounds:	Yes
LTV/CLTV:	75.00% / 75.00%	Tax Impounds:	Yes
MI Coverage:	0.00%	Agency Case Number:	

[Merge a Loan](#)

Upload / Conditions Tab

If you want to upload all of your conditions as one upload click here:

Loan Number 64001209, John Sample

Floating

✓ Registered 02/18/2019	Setup Received	Submitted to UW	Approved with Conditions	Early CD Eligible	UW Final Approved	Funded
----------------------------	----------------	-----------------	-----------------------------	-------------------	-------------------	--------


Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

← [Loan Details](#) [DU Retrieval](#) [Pricing/Lock](#) **Upload / Conditions** [Submit Loan](#) [Get Forms / Files](#) [Messages](#) →

Conditions

[For a Printer Friendly Condition List Click Here](#)

[Refresh](#)

Would you like to upload all documents as a single file? 

Conditions can be reviewed and uploaded here in bulk, or individually. Once uploaded, the condition will show as Received which puts the document in line for review by the employee assigned to the role under "To Be Reviewed By".

The "Code" legend:

U = Prior to Underwriting.

A = Prior to Approval.

Initial Conditions List

The system will show you all the loan conditions before you submit the file based on the information you provide in the FNMA 3.2 file.

	Code	#	Received	Status	For	Reviewed By	Condition
▼	M		Upload			Loan Setup	TPO to provide all subsequent Loan Estimates for all changes of circumstance prior to UW Submission.
▼	U	4	Upload			Loan Setup	TPO to provide initial 1003 executed by LO and all other initial disclosures including any Loan Estimates already given to the borrower, along with their COC's, which have all been properly executed by all borrower(s).
▼	U	5	Upload			Underwriter	TPO to provide tri-merged credit report dated within 90 days of submission.
▼	U	0	Upload		ABC Trucking, John Sample	Underwriter	Provide full written VOE, with a break down of the income, to support the income indicated on the application in addition to the base income.
▼	U	6	Upload			Underwriter	Provide complete, fully executed & dated Purchase/Sales Contract
▼	U	7	Upload			Loan Setup	Borrower Executed certification, or other evidence that the "Know Before You Owe" booklet was delivered within three days of the signed application

Initial Conditions List

The “For” column will tell you which borrower, property, or bank the condition is related to.

	Code	#	Received	Status	For	Reviewed By	Condition
▼	M		Upload			Loan Setup	TPO to provide all subsequent Loan Estimates for all changes of circumstance prior to UW Submission.
▼	U	4	Upload			Loan Setup	TPO to provide initial 1003 executed by LO and all other initial disclosures including any Loan Estimates already given to the borrower, along with their COC's, which have all been properly executed by all borrower(s).
▼	U	5	Upload			Underwriter	TPO to provide tri-merged credit report dated within 90 days of submission.
▼	U	0	Upload		ABC Trucking, John Sample	Underwriter	Provide full written VOE, with a break down of the income, to support the income indicated on the application in addition to the base income.
▼	U	6	Upload			Underwriter	Provide complete, fully executed & dated Purchase/Sales Contract
▼	U	7	Upload			Loan Setup	Borrower Executed certification, or other evidence that the "Know Before You Owe" booklet was delivered within three days of the signed application

Initial Conditions List

The “Reviewed By” column will tell you who to contact if you have questions about the condition.

	Code	#	Received	Status	For	Reviewed By	Condition
▼	M		Upload			Loan Setup	TPO to provide all subsequent Loan Estimates for all changes of circumstance prior to UW Submission.
▼	U	4	Upload			Loan Setup	TPO to provide initial 1003 executed by LO and all other initial disclosures including any Loan Estimates already given to the borrower, along with their COC's, which have all been properly executed by all borrower(s).
▼	U	5	Upload			Underwriter	TPO to provide tri-merged credit report dated within 90 days of submission.
▼	U	0	Upload		ABC Trucking, John Sample	Underwriter	Provide full written VOE, with a break down of the income, to support the income indicated on the application in addition to the base income.
▼	U	6	Upload			Underwriter	Provide complete, fully executed & dated Purchase/Sales Contract
▼	U	7	Upload			Loan Setup	Borrower Executed certification, or other evidence that the "Know Before You Owe" booklet was delivered within three days of the signed application

Initial Conditions List

If you want to see the images in a condition click the magnifying glass and click “view 1 image”.

Code	#	Received	Status	For	Reviewed By	Condition	
▼	☰	M	Upload	Received	Q	Loan Setup	TPO to provide all subsequent Loan Estimates for all changes of circumstance prior to UW Submission.
Image Status							
Date	Image Status	View Images	Image Notes				
02/20/2019	Received	View 1 Image(s)					
In Progress							

Get Forms / Files

If you want to see the current 1003, 1008, Lock Confirmation, Purchase Advice, Income Calculations, or the Complete loan file click on the Get Forms / Files tab.



Loan Number 64001209, John Sample **Floating**

✓ Registered 02/18/2019	Setup Received	Submitted to UW	Approved with Conditions	Early CD Eligible	UW Final Approved	Funded
----------------------------	----------------	-----------------	-----------------------------	-------------------	-------------------	--------



Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

◀ [Loan Details](#) [DU Retrieval](#) [Pricing/Lock](#) [Upload / Conditions](#) [Submit Loan](#) **[Get Forms / Files](#)** [Messages](#) ▶

Forms

-  Application
-  Transmittal Summary

Imaging Package

-  Complete Loan File
-  Underwriter Income Calculations

Messages

If you want to get an answer to a question your loans contacts will appear in this list and you can send a message to them directly in the system.

The screenshot displays the NEXBANK user interface for a loan with ID 64003069, owned by John Sample. The loan status is 'Floating'. A progress bar shows the following steps: Setup Received (05/14/2019), Submitted to UW (05/14/2019), Approved with Conditions (05/14/2019), UW Final Approved (05/14/2019), Closing Package Received, and Purchased. Below the progress bar, there is a message: 'Clear to Close! Please upload your completed closing package and all closing related documents in the "Conditions" tab in bulk and when you are ready to submit the loan for Pre-Purchase review, go to the "Submit for Purchase" tab and click Submit!'. A navigation menu includes options like Pricing/Lock, Upload / Conditions, Submit for Purchase, Closing Request, Get Forms / Files, Messages, and Excel. The 'Messages' section is active, showing a 'Contacts' table with columns for Contact, Name, Phone, and Message. The contacts listed are Loan Setup (Theresa Dougherty), Client Advocate (Client Advocate), Underwriter (Underwriter Sample), and Closer (Closer Sample). Below the contacts is a 'Loan Communication Log' section with tabs for 'Inbox' and 'Sent Items', and a table with columns for Status, Subject, Sent By, and Date.

Loan Number 64003069, John Sample Floating

✓ Setup Received 05/14/2019 ✓ Submitted to UW 05/14/2019 ✓ Approved with Conditions 05/14/2019 ✓ UW Final Approved 05/14/2019 Closing Package Received Purchased

Clear to Close! Please upload your completed closing package and all closing related documents in the "Conditions" tab in bulk and when you are ready to submit the loan for Pre-Purchase review, go to the "Submit for Purchase" tab and click Submit!

← Pricing/Lock Upload / Conditions Submit for Purchase Closing Request Get Forms / Files Messages Excel →

Messages

Contacts

Contact	Name	Phone	Message
Loan Setup	Theresa Dougherty	(469) 362-8818	✉
Client Advocate	Client Advocate	(469) 362-8822	✉
Underwriter	Underwriter Sample	(877) 934-4852	✉
Closer	Closer Sample	(877) 934-4852	✉

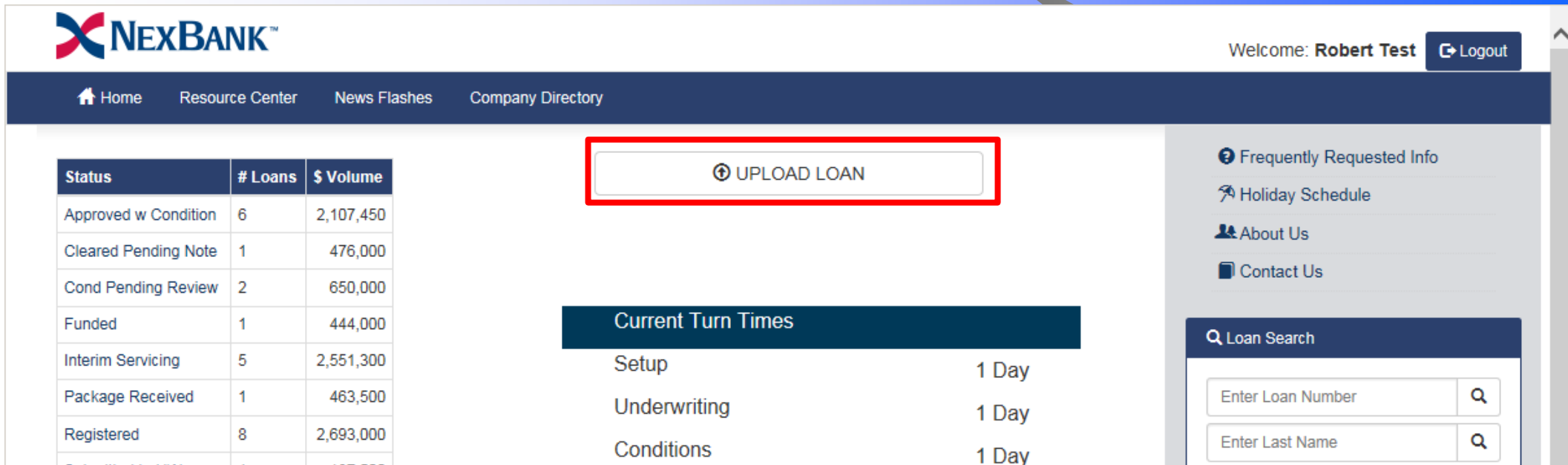
Loan Communication Log

Inbox Sent Items

Status	Subject	Sent By	Date
--------	---------	---------	------

Upload A Loan

From the home screen after you login there will be a “Upload Loan” Button in the center.



The screenshot displays the NexBank home interface. At the top left is the NexBank logo. The top right shows a user greeting: "Welcome: Robert Test" and a "Logout" button. A navigation bar below the header contains links for "Home", "Resource Center", "News Flashes", and "Company Directory".

In the center of the page, a white button with a red border and a circular arrow icon is labeled "UPLOAD LOAN".

To the left of the button is a table with the following data:

Status	# Loans	\$ Volume
Approved w Condition	6	2,107,450
Cleared Pending Note	1	476,000
Cond Pending Review	2	650,000
Funded	1	444,000
Interim Servicing	5	2,551,300
Package Received	1	463,500
Registered	8	2,693,000

Below the table is a section titled "Current Turn Times" with the following details:

Category	Duration
Setup	1 Day
Underwriting	1 Day
Conditions	1 Day

On the right side of the page, there is a sidebar with several links: "Frequently Requested Info", "Holiday Schedule", "About Us", and "Contact Us". Below these links is a "Loan Search" section with two input fields: "Enter Loan Number" and "Enter Last Name", each with a search icon.

Upload A Loan

Depending on your company's seller type, and your user rights, you will see different options on the loan setup wizard.

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Home Resource Center News Flashes Company Directory

Upload

Channel

AUS: --Select-- Loan Program: --Select--

Channel: --Select--

Upload File

File

File type FNMA 3.2

[Upload File & Next](#)

Upload A Loan

Select how you want us to underwrite, close, and/or purchase your loan.

NEXBANK™

Home Resource Center News Flashes Company Directory

Upload

Channel

AUS: --Select-- Loan Program: --Select--

Channel: --Select--

Upload File

File

File type FNMA 3.2

[Upload File & Next](#)

Upload A Loan

Drag and drop or click in the box to select your FNMA 3.2 file.

NEXBANK™

Home Resource Center News Flashes Company Directory

Upload

Channel

AUS: --Select--

Loan Program: --Select--

Channel: --Select--

Upload File

File

Drag the file here or click here to browse the file

File type

FNMA 3.2

Upload File & Next

Upload A Loan

Then click “Upload File & Next”.

NEXBANK™

Home Resource Center News Flashes Company Directory

Upload

Channel

AUS: --Select--

Loan Program: --Select--

Channel: --Select--

Upload File

File

Drag the file here or click here to browse the file

File type

FNMA 3.2

➤ Upload File & Next

Upload A Loan

Depending on your selections you may have an additional set of questions to answer.

NEXBANK™

Home Resource Center News Flashes Company Directory

Workflow Options Loan Number: **64003067**

Upload / Workflow Options

Workflow Options

Do you want to use our on-site Document Preparation for Closing Docs?:

[← Back](#)

Upload A Loan

After you made all of your selections click “Submit” and wait for the system to take you into the newly created loan.

NEXBANK™

Home Resource Center News Flashes Company Directory

Workflow Options Loan Number: **64003067**

Upload / Workflow Options

Workflow Options

Do you want to use our on-site Document Preparation for Closing Docs?:

[← Back](#)

Price A Loan

After your loan has uploaded you will want to price your loan to our current rate sheet. Click on the Pricing/Lock Tab.

NEXBANK™ Welcome: **Robert Test** [Logout](#)

[Home](#) [Resource Center](#) [News Flashes](#) [Company Directory](#)

Loan Number 64003067, John Sample **Floating**

✓ Registered 05/14/2019 | Setup Received | Submitted to UW | Approved with Conditions | UW Final Approved | Closing Package Received | Purchased

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

[Loan Details](#) **Pricing/Lock** [Upload / Conditions](#) [Submit Loan](#) [Get Forms / Files](#) [Messages](#) [Exception Reque](#)

Loan Details

Borrower

Name:	John Sample	Citizenship:	U.S. Citizen
Occupancy:	Owner	Marital Status:	Married

Subject Property

Street:	15 Sandstone Ct	Property Type:	Single Family Dwelling
----------------	-----------------	-----------------------	------------------------

Loan Search

Enter Loan Number

Enter Last Name

Did you know
NexBank offers Reduced Doc Jumbo Mortgages
at an exceptional rate

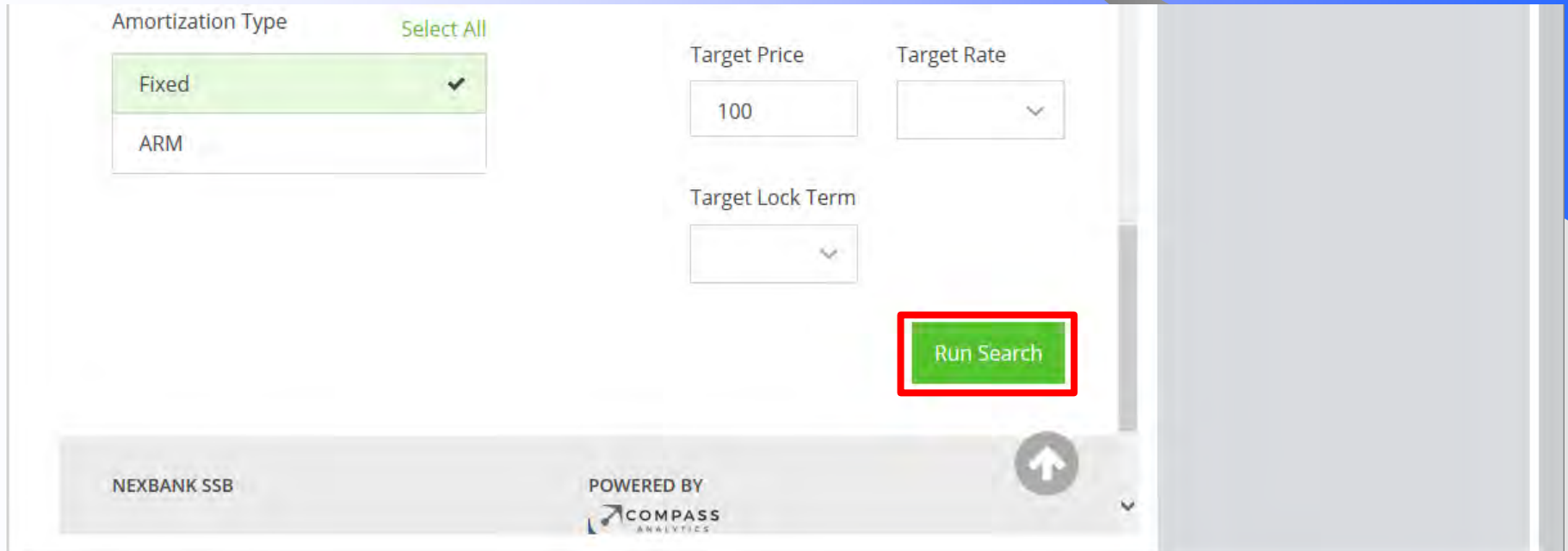
Price A Loan

Scroll down on the pricing window and update the information.

The screenshot shows the NexBank website interface for loan pricing. At the top, the NexBank logo is on the left, and the user is logged in as Robert Test. The main content area displays loan details for loan number 64003067, including a progress bar with steps like 'Registered', 'Setup Received', 'Submitted to UW', 'Approved with Conditions', 'UW Final Approved', 'Closing Package Received', and 'Purchased'. Below this, there are navigation tabs for 'Loan Details', 'Pricing/Lock', 'Upload / Conditions', 'Submit Loan', 'Get Forms / Files', 'Messages', and 'Exception Reque'. The 'Pricing/Lock' section is active, showing a 'NEW SEARCH' button and a 'Run Search' button. A red arrow points to the 'Run Search' button. A red box highlights the scrollbar on the right side of the page, indicating where to scroll down. The 'LOAN SCENARIO' section shows 'Loan Purpose' set to 'Purchase' and 'Application Date' set to '2019-05-14'. On the right side, there is a 'Loan Search' section with input fields for 'Enter Loan Number' and 'Enter Last Name', and a promotional banner for 'Receive an extra 0.125% in price on all Conventional Fixed Rate Loans with a 720+ FICO'.

Price A Loan

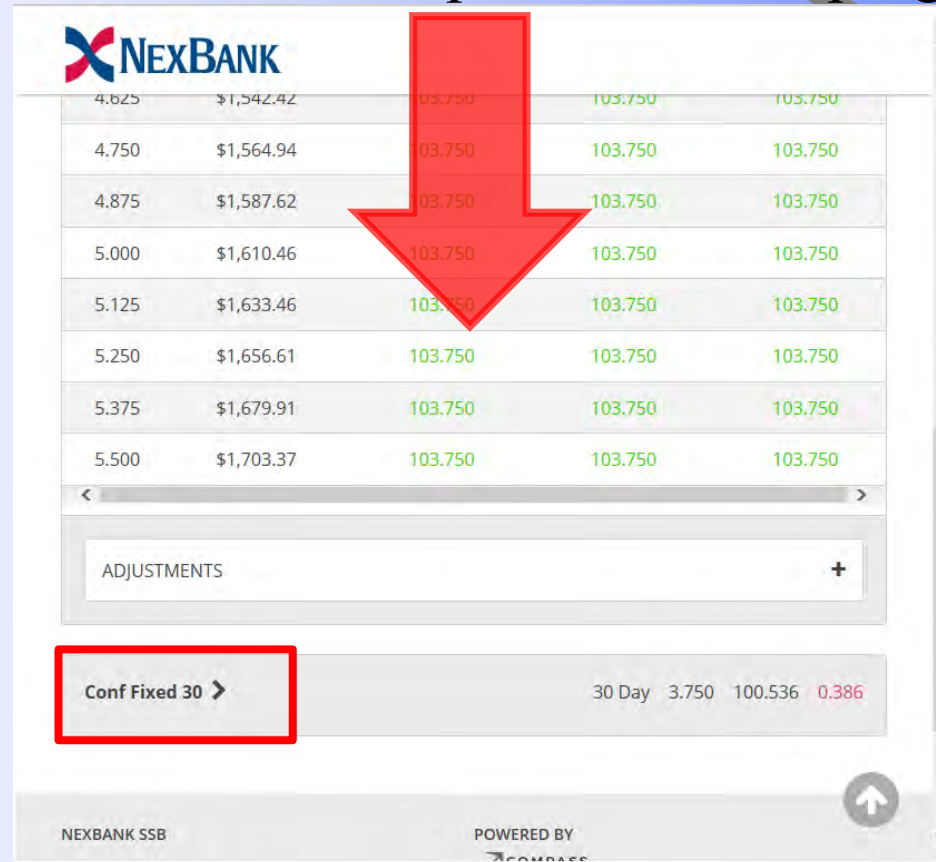
After updating all of the information, click on “Run Search” at the bottom of the page.



The screenshot shows a web interface for pricing a loan. On the left, under "Amortization Type", there is a dropdown menu with "Fixed" selected (indicated by a checkmark) and "ARM" as an option. A "Select All" link is visible above the dropdown. To the right, there are three input fields: "Target Price" with the value "100", "Target Rate" with a dropdown arrow, and "Target Lock Term" with a dropdown arrow. A green "Run Search" button is highlighted with a red rectangular border. At the bottom of the interface, there is a footer area containing the text "NEXBANK SSB", "POWERED BY COMPASS ANALYTICS", and a circular button with an upward-pointing arrow.

Price A Loan

On the following page the system will list all the eligible programs with the best priced program on top. If you want a different program scroll down past the first program and click on the title bar to expand the other programs pricing table.



Rate	Amount	APR	Rate	Rate
4.625	\$1,542.42	103.750	103.750	103.750
4.750	\$1,564.94	103.750	103.750	103.750
4.875	\$1,587.62	103.750	103.750	103.750
5.000	\$1,610.46	103.750	103.750	103.750
5.125	\$1,633.46	103.750	103.750	103.750
5.250	\$1,656.61	103.750	103.750	103.750
5.375	\$1,679.91	103.750	103.750	103.750
5.500	\$1,703.37	103.750	103.750	103.750

ADJUSTMENTS +


Conf Fixed 30 > 30 Day 3.750 100.536 0.386

NEXBANK SSB POWERED BY

Price A Loan

Once you are on the program table you want, click the rate and pricing you want.

Pricing/Lock ← Back Next →



QUALIFIED DISQUALIFIED

Conf Fixed 30 HomeReady ▾

Rate	P&I	05/29/2019	06/13/2019	06/28/2019
		15 Day	30 Day	45 Day
3.625	\$1,368.15	100.180	100.150	100.021
3.750	\$1,389.35	100.815	100.786	100.657
3.875	\$1,410.71	101.388	101.359	101.229
4.000	\$1,432.25	101.775	101.746	101.616
4.125	\$1,453.95	102.241	102.212	102.082
4.250	\$1,475.82	102.796	102.767	102.637
4.375	\$1,497.86	103.250	103.221	103.092
4.500	\$1,520.06	103.682	103.653	103.523
4.625	\$1,542.42	103.750	103.750	103.750

Price A Loan

Next scroll down until you see the “Save to LOS” and either the “AutoLock” or “Lock Request” buttons.

Pricing/Lock Back Next

NEXBANK

Status: Prospect Loan #: 68003067 Borrower: Sample Originator: Homewood Mortgage, LLC.

Conf Fixed 30 HomeReady

May 14

Rate	30 Day	P&I
4.250	102.767	\$1,475.82

BREAKDOWN

	Rate	Price
Base:	4.250	102.517
Conv Fixed & ARM LTV/FICO Adj >15yr Credit Score > 739 <= 999, LTV <= 75.000%		-0.125
Conventional Fixed		0.125

LOCK REQUEST

Borrower First Name	Property Address
John	15 Sandstone Ct
Borrower Last Name	Property City
Sample	San Rafael
Borrower SSN	Borrower Email
999-40-5000	robert.bryan3225@gm
Borrower Phone #	Notes
(772)221-2809	

SAVE TO LOS **AUTOLOCK™**

Price A Loan

Make a selection by clicking one of the buttons.

Pricing/Lock Back Next

NEXBANK

Status: Prospect Loan #: 68003067 Borrower: Sample Originator: Homewood Mortgage, LLC.

Conf Fixed 30 HomeReady

May 14

Rate	30 Day	P&I
4.250	102.767	\$1,475.82

BREAKDOWN

	Rate	Price
Base:	4.250	102.517
Conv Fixed & ARM LTV/FICO Adj >15yr Credit Score > 739 <= 999, LTV <= 75.000%		-0.125
Conventional Fixed		0.125

LOCK REQUEST

Borrower First Name	Property Address
John	15 Sandstone Ct
Borrower Last Name	Property City
Sample	San Rafael
Borrower SSN	Borrower Email
999-40-5000	robert.bryan3225@gm
Borrower Phone #	Notes
(772)221-2809	

SAVE TO LOS **AUTOLOCK™**

Retrieve DU Findings

Navigate to the DU Retrieval tab enter your Fannie Mae Casefile ID and click save and then click Download.

The screenshot displays the NexBank user interface for loan management. At the top, the NexBank logo is on the left, and the user is logged in as Robert Test with a Logout button. A navigation bar includes Home, Resource Center, News Flashes, and Company Directory. The main content area shows loan details for Loan Number 64003067, John Sample, in a Floating status. A progress bar indicates the loan is Registered (05/14/2019) and has moved through Setup Received, Submitted to UW, Approved with Conditions, UW Final Approved, Closing Package Received, and Purchased. A message prompts the user to price the loan and "Save to LOS" or "Lock it in" to retrieve AUS Findings. Below this, a breadcrumb trail includes Loan Details, DU Retrieval (highlighted), Pricing/Lock, Upload / Conditions, Submit Loan, Get Forms / Files, and Messages. Under the "Fannie Mae" section, a "Save" button is highlighted with a red box. Below it are tabs for Request, Data, and Government. A "Fannie Mae Desktop Underwriter" section contains a "Fannie Mae DU Case File ID" input field and a "Download" button, both highlighted with red boxes. On the right sidebar, there are links for Frequently Requested Info, Holiday Schedule, About Us, and Contact Us, along with a Loan Search section.

Retrieve DU Findings

After Saving, click Download.

The screenshot displays the NexBank user interface. At the top, the NexBank logo is on the left, and the user's name 'Robert Test' with a 'Logout' button is on the right. A navigation bar contains links for Home, Resource Center, News Flashes, and Company Directory. The main content area is titled 'Loan Number 64003067, John Sample' with a 'Floating' status. A progress bar shows the following steps: Registered (05/14/2019), Setup Received, Submitted to UW, Approved with Conditions, UW Final Approved, Closing Package Received, and Purchased. Below the progress bar, a message instructs the user to price the loan and 'Save to LOS' or 'Lock it in' to retrieve AUS Findings or Credit. A breadcrumb trail includes 'Loan Details', 'DU Retrieval' (the active tab), 'Pricing/Lock', 'Upload / Conditions', 'Submit Loan', 'Get Forms / Files', and 'Messages'. Under the 'Fannie Mae' section, there is a 'Save' button and tabs for 'Request', 'Data', and 'Government'. The 'Fannie Mae Desktop Underwriter' section contains a text input field for 'Fannie Mae DU Case File ID' and a 'Download' button, which is highlighted with a red rectangular box. On the right side, there is a 'Frequently Requested Info' sidebar with links for 'Holiday Schedule', 'About Us', and 'Contact Us'. Below this is a 'Loan Search' section with two input fields: 'Enter Loan Number' and 'Enter Last Name', each with a search icon. At the bottom of the sidebar is a promotional banner for 'Reduced Doc Jumbo Mortgages'.

Retrieve LPA Findings

Navigate to the LPA Retrieval Tab. Then Click on the “Request” sub-tab.

NEXBANK™ Welcome: **Robert Test** [Logout](#)

[Home](#) [Resource Center](#) [News Flashes](#) [Company Directory](#)

Loan Number 64003069, John Sample **Floating**

✓ Registered 05/14/2019 Setup Received Submitted to UW Approved with Conditions UW Final Approved Closing Package Received Purchased

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

← [Loan Details](#) **[LPA Retrieval](#)** [Pricing/Lock](#) [Upload / Conditions](#) [Submit Loan](#) [Get Forms / Files](#) [Messages](#) →

Freddie Mac Loan Product Advisor

[Save](#) [Data Check](#)

[Data](#) **[Request](#)** [Result 0](#)

Seller Provided Below Market Financing

Sales Concessions

Loan Search

Enter Loan Number

Enter Last Name

NexBank is a proud sponsor of the **FNMA HomeReady Product**

Receive an extra **0.250%** in price on all CHR30 Loans

Retrieve LPA Findings

From the sub-tab, enter the LPA Key and Loan Prospector ID.

NEXBANK™ Welcome: **Robert Test** [Logout](#)

[Home](#) [Resource Center](#) [News Flashes](#) [Company Directory](#)

Loan Number 64003069, John Sample **Floating**

✓ Registered 05/14/2019 Setup Received Submitted to UW Approved with Conditions UW Final Approved Closing Package Received Purchased

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

[Loan Details](#) **LPA Retrieval** [Pricing/Lock](#) [Upload / Conditions](#) [Submit Loan](#) [Get Forms / Files](#) [Messages](#)

Freddie Mac Loan Product Advisor

[Save](#) [Data Check](#)

[Data](#) [Request](#) [Result 0](#)

Key Number

Loan Prospector ID

[Get Existing Findings](#)

Frequently Requested Info

- [Holiday Schedule](#)
- [About Us](#)
- [Contact Us](#)

Loan Search

Enter Loan Number

Enter Last Name

NexBank is a proud sponsor of the **FNMA HomeReady Product**

Receive an extra **0.250%** in price on all CHR30 Loans

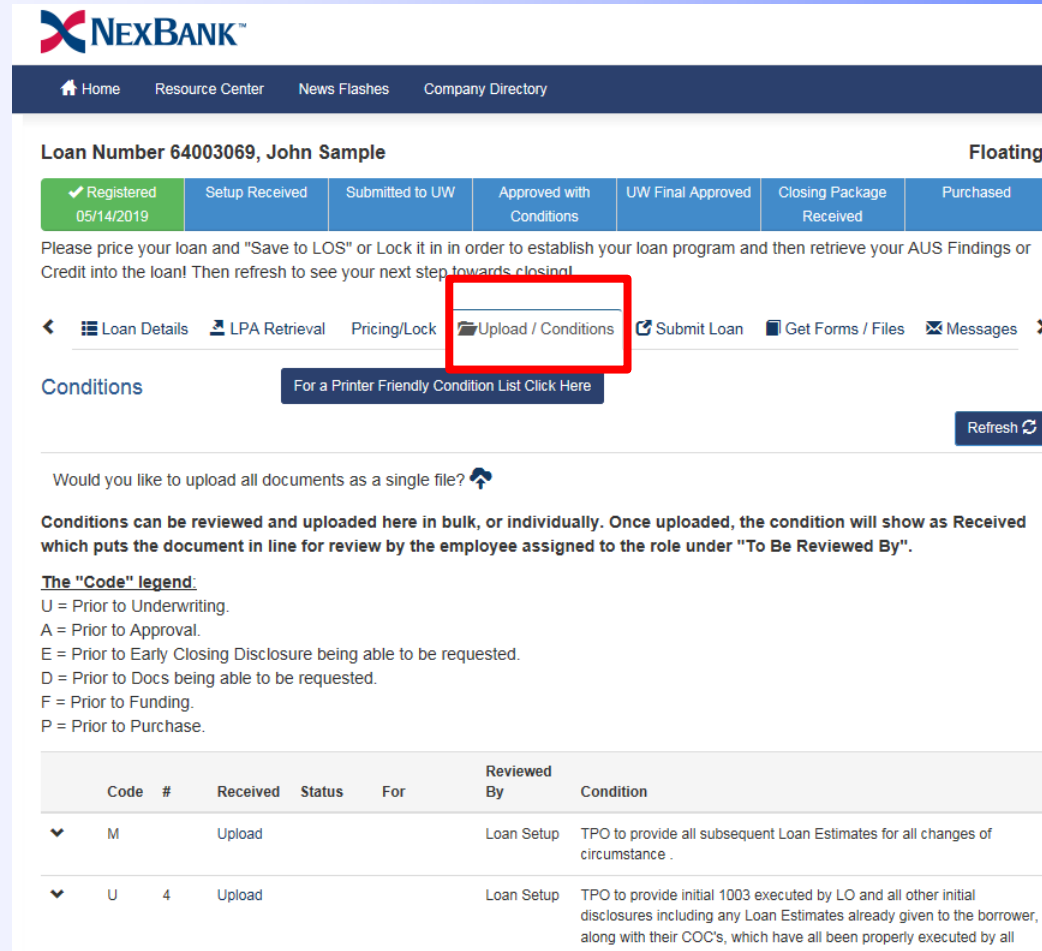
Retrieve LPA Findings

Click “Get Existing Findings”.

The screenshot displays the NexBank user interface for loan management. At the top, the NexBank logo is on the left, and the user is logged in as Robert Test with a Logout button. A navigation bar includes Home, Resource Center, News Flashes, and Company Directory. The main content area is titled "Loan Number 64003069, John Sample" and "Floating". A progress bar shows the loan status: Registered (05/14/2019), Setup Received, Submitted to UW, Approved with Conditions, UW Final Approved, Closing Package Received, and Purchased. Below the progress bar, a message instructs the user to price the loan and retrieve AUS Findings. A breadcrumb trail includes Loan Details, LPA Retrieval (highlighted), Pricing/Lock, Upload / Conditions, Submit Loan, Get Forms / Files, and Messages. The "Freddie Mac Loan Product Advisor" section contains a Save button, a Data Check button, and tabs for Data, Request, and Result (0). Input fields for Key Number and Loan Prospector ID are present. A "Get Existing Findings" button is highlighted with a red box. On the right sidebar, there are links for Frequently Requested Info, Holiday Schedule, About Us, and Contact Us, along with a Loan Search section with input fields for Loan Number and Last Name. A promotional banner for FNMA HomeReady Product offers an extra 0.250% on all CHR30 Loans.

Upload Package

Click on the Upload / Conditions Tab



NEXBANK™

Home Resource Center News Flashes Company Directory

Loan Number 64003069, John Sample Floating

Registered 05/14/2019 Setup Received Submitted to UW Approved with Conditions UW Final Approved Closing Package Received Purchased

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

Loan Details LPA Retrieval Pricing/Lock **Upload / Conditions** Submit Loan Get Forms / Files Messages

Conditions [For a Printer Friendly Condition List Click Here](#) Refresh

Would you like to upload all documents as a single file?

Conditions can be reviewed and uploaded here in bulk, or individually. Once uploaded, the condition will show as Received which puts the document in line for review by the employee assigned to the role under "To Be Reviewed By".

The "Code" legend:
U = Prior to Underwriting.
A = Prior to Approval.
E = Prior to Early Closing Disclosure being able to be requested.
D = Prior to Docs being able to be requested.
F = Prior to Funding.
P = Prior to Purchase.

Code	#	Received	Status	For	Reviewed By	Condition
▼	M	Upload			Loan Setup	TPO to provide all subsequent Loan Estimates for all changes of circumstance .
▼	U	4	Upload		Loan Setup	TPO to provide initial 1003 executed by LO and all other initial disclosures including any Loan Estimates already given to the borrower, along with their COC's, which have all been properly executed by all

Upload Package

You can upload your entire submission package by clicking on the cloud-arrow

NEXBANK™

Home Resource Center News Flashes Company Directory

Loan Number 64003069, John Sample Floating

Registered 05/14/2019 Setup Received Submitted to UW Approved with Conditions UW Final Approved Closing Package Received Purchased

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

Loan Details LPA Retrieval Pricing/Lock **Upload / Conditions** Submit Loan Get Forms / Files Messages

Conditions [For a Printer Friendly Condition List Click Here](#) [Refresh](#)

Would you like to upload all documents as a single file?

Conditions can be reviewed and uploaded here in bulk, or individually. Once uploaded, the condition will show as Received which puts the document in line for review by the employee assigned to the role under "To Be Reviewed By".

The "Code" legend:
U = Prior to Underwriting.
A = Prior to Approval.
E = Prior to Early Closing Disclosure being able to be requested.
D = Prior to Docs being able to be requested.
F = Prior to Funding.
P = Prior to Purchase.

Code	#	Received	Status	For	Reviewed By	Condition
▼	M	Upload			Loan Setup	TPO to provide all subsequent Loan Estimates for all changes of circumstance .
▼	U	4	Upload		Loan Setup	TPO to provide initial 1003 executed by LO and all other initial disclosures including any Loan Estimates already given to the borrower, along with their COC's, which have all been properly executed by all

Upload Package

From this screen, select your file, and click “Start Upload”. You can close the window when the upload window indicates 100% and says you may close the window. It may still have processing to do in the background.

Loan Number: 64003069

Upload All Documents as a single file

*Note: File size limit is 100mb
Password protected files are not supported
A large file will take a longer time to upload to LOS*

Select File Start Upload Close

Upload Package

Alternatively, you can upload individual documents to the condition it meets by dragging the document over the upload link on the row.

Loan Number 64003069, John Sample Floating

✓ Setup Received 05/14/2019	✓ Submitted to UW 05/14/2019	✓ Approved with Conditions 05/14/2019	✓ UW Final Approved 05/14/2019	Closing Package Received	Purchased
--------------------------------	---------------------------------	---	-----------------------------------	-----------------------------	-----------

Clear to Close! Please upload your completed closing package and all closing related documents in the "Conditions" tab in bulk and when you are ready to submit the loan for Pre-Purchase review, go to the "Submit for Purchase" tab and click Submit!

← Loan Details Pricing/Lock Upload / Conditions Submit for Purchase Closing Request Get Forms / Files →

Conditions [For a Printer Friendly Condition List Click Here](#) Refresh ↻

Would you like to upload all documents as a single file?  

Conditions can be reviewed and uploaded here in bulk, or individually. Once uploaded, the condition will show as Received which puts the document in line for review by the employee assigned to the role under "To Be Reviewed By".

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E = Prior to Early Closing Disclosure being able to be requested.
D = Prior to Docs being able to be requested.
F = Prior to Funding.
P = Prior to Purchase.

Code	#	Received	Status	For	Reviewed By	Condition
▼ F	2	Upload			Funder	Provide the 4506-T Signed at Closing.

Viewing Uploaded Items

You can view documents you've uploaded to individual condition by clicking the magnifying glass and clicking on the upload you wish to view.

NEXBANK™

Home Resource Center News Flashes Company Directory

Loan Number 64003069, John Sample Floating

✓ Setup Received 05/14/2019	✓ Submitted to UW 05/14/2019	✓ Approved with Conditions 05/14/2019	✓ UW Final Approved 05/14/2019	Closing Package Received	Purchased
--------------------------------	---------------------------------	---	-----------------------------------	-----------------------------	-----------

Clear to Close! Please upload your completed closing package and all closing related documents in the "Conditions" tab in bulk and when you are ready to submit the loan for Pre-Purchase review, go to the "Submit for Purchase" tab and click Submit!

← Loan Details Pricing/Lock Upload / Conditions Submit for Purchase Closing Request Get Forms / Files →

Conditions [For a Printer Friendly Condition List Click Here](#) Refresh

Would you like to upload all documents as a single file?

Conditions can be reviewed and uploaded here in bulk, or individually. Once uploaded, the condition will show as Received which puts the document in line for review by the employee assigned to the role under "To Be Reviewed By".

The "Code" legend:
U = Prior to Underwriting.
A = Prior to Approval.
E = Prior to Early Closing Disclosure being able to be requested.
D = Prior to Docs being able to be requested.
F = Prior to Funding.
P = Prior to Purchase.

Code	#	Received	Status	For	Reviewed By	Condition
F	2	Upload	Received		Funder	Provide the 4506-T Signed at Closing.

Image Status

Date	Image Status	View Images	Image Notes
05/15/2019	Received	View 1 Image(s)	

In Progress

Message Our Staff

Navigate to the messages tab. You can see who's assigned to your loan and send messages directly through the system!

The screenshot displays the NEXBANK loan management interface for Loan Number 64003069, John Sample. The interface includes a progress bar with stages: Setup Received (05/14/2019), Submitted to UW (05/14/2019), Approved with Conditions (05/14/2019), UW Final Approved (05/14/2019), Closing Package Received, and Purchased. A navigation menu at the bottom highlights the 'Messages' tab. Below this, there is a 'Messages' section with a 'Contacts' table and a 'Loan Communication Log' section.

Contacts Table:

Contact	Name	Phone	Message
Loan Setup	Theresa Dougherty	(469) 362-8818	✉
Client Advocate	Client Advocate	(469) 362-8822	✉
Underwriter	Underwriter Sample	(877) 934-4852	✉
Closer	Closer Sample	(877) 934-4852	✉

Loan Communication Log:

Inbox | Sent Items

Status	Subject	Sent By	Date
--------	---------	---------	------

Update loan data (merge loan)

If you need to update your loan file after your initial pricing/disclosure, just navigate to the “Loan Details” screen and click the “Merge A Loan” button

Navigation: Loan Details | DU Retrieval | Pricing/Lock | Upload / Conditions | Submit Loan | Get Forms / Files | Messages

Loan Details

Borrower			
Name:	John Sample	Citizenship:	U.S. Citizen
Occupancy:	Owner	Marital Status:	Married

Subject Property			
Street:	15 Sandstone Ct	Property Type:	Single Family Dwelling
City, St Zip:	San Rafael CA 94901	Units:	1

Loan Information			
Loan Program:	Conf Fixed 30	Rate:	5.125%
Loan Purpose:	Purchase	Lock Status:	Floating
Loan Amount:	\$300,000.00	Ratios:	14.60% / 35.88%
Base Loan:	\$300,000.00	Haz Impounds:	Yes
LTV/CLTV:	75.00% / 75.00%	Tax Impounds:	Yes
MI Coverage:	0.00%	Agency Case Number:	

[Merge a Loan](#)

Submit Your Loan

Navigate to the Submit Loan tab.

NEXBANK™ Welcome: **Robert Test** [Logout](#)

[Home](#) [Resource Center](#) [News Flashes](#) [Company Directory](#)

Loan Number 64003069, John Sample **Floating**

✓ Registered 05/14/2019 Setup Received Submitted to UW Approved with Conditions UW Final Approved Closing Package Received Purchased

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

[Loan Details](#) [LPA Retrieval](#) [Pricing/Lock](#) [Upload / Conditions](#) **[Submit Loan](#)** [Get Forms / Files](#) [Messages](#)

Conditions [For a Printer Friendly Condition List Click Here](#) [Refresh](#)

Would you like to upload all documents as a single file?

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A = Prior to Approval.
E = Prior to Early Closing Disclosure being able to be requested.
D = Prior to Docs being able to be requested.

Loan Search
Enter Loan Number
Enter Last Name

Did you know
NexBank offers Reduced Doc Jumbo Mortgages
at an exceptional rate

Submit Your Loan

You may be asked additional questions about your submission based on the previous questions along with the credit and AUS information you've imported.

NEXBANK™ Welcome: **Robert Test** [Logout](#)

[Home](#) [Resource Center](#) [News Flashes](#) [Company Directory](#)

Loan Number 64003069, John Sample **Floating**

✓ Registered 05/14/2019 | Setup Received | Submitted to UW | Approved with Conditions | UW Final Approved | Closing Package Received | Purchased

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

[Loan Details](#) [LPA Retrieval](#) [Pricing/Lock](#) [Upload / Conditions](#) [Submit Loan](#) [Get Forms / Files](#) [Messages](#)

[Save](#) [Submit Loan](#) [Data Check](#)

Loan Information

Loan Program: Power of Attorney:

[Save](#) [Submit Loan](#)

Loan Search

Enter Loan Number

Enter Last Name

Receive an **extra 0.125% in price** on all **Conventional Fixed Rate Loans** with a **720+ FICO**

Submit Your Loan

Click “Submit Loan”.

The screenshot shows the NEXBANK user interface for loan management. At the top, the NEXBANK logo is on the left, and the user is logged in as Robert Test with a Logout button on the right. A navigation bar contains links for Home, Resource Center, News Flashes, and Company Directory. The main content area displays the loan details for loan number 64003069, John Sample, in a 'Floating' status. A progress bar shows the loan's status: Registered (05/14/2019), Setup Received, Submitted to UW, Approved with Conditions, UW Final Approved, Closing Package Received, and Purchased. Below the progress bar, a message instructs the user to price the loan and 'Save to LOS' or 'Lock it in' to establish the loan program and retrieve AUS Findings or Credit. A breadcrumb trail includes Loan Details, LPA Retrieval, Pricing/Lock, Upload / Conditions, Submit Loan (highlighted), Get Forms / Files, and Messages. Action buttons for Save, Submit Loan, and Data Check are visible. The 'Loan Information' section shows 'Loan Program' set to 'Conf Fixed 30' and 'Power of Attorney' set to 'No'. A second 'Submit Loan' button is highlighted with a red box. On the right sidebar, there are links for Frequently Requested Info, Holiday Schedule, About Us, and Contact Us, along with a Loan Search section containing input fields for Loan Number and Last Name. A promotional banner at the bottom right offers an extra 0.125% in price on all Conventional Fixed Rate Loans with a 720+ FICO score.

Retrieve Copies of Forms & Docs

Navigate to the “Get Forms / Files” tab and click on the link you want.

The screenshot displays the NexBank portal interface for a user named Robert Test. The main content area shows the loan status for Loan Number 64003069, John Sample, with a progress bar indicating stages: Setup Received, Submitted to UW, Approved with Conditions, UW Final Approved, Closing Package Received, and Purchased. Below the progress bar, a message states: "Clear to Close! Please upload your completed closing package and all closing related documents in the 'Conditions' tab in bulk and when you are ready to submit the loan for Pre-Purchase review, go to the 'Submit for Purchase' tab and click Submit!". A navigation bar below the message includes tabs for "ons", "Submit for Purchase", "Closing Request", "Get Forms / Files" (highlighted with a red box), "Messages", and "Exception Requests".

Below the navigation bar, there are two sections highlighted with red boxes:

- Forms**: A list of document types including "Application" and "Transmittal Summary".
- Imaging Package**: A list of document types including "Underwriter Income Calculations" and "Pred-Protect Results".

On the right side of the page, there is a sidebar with a "Loan Search" section containing input fields for "Enter Loan Number" and "Enter Last Name", and a promotional banner for "FNMA HomeReady Product" offering an extra 0.250% in price on all CHR30 Loans.

View Conditions Status

On the conditions tab you will see a “Received” status after an image has been uploaded to a condition that has not yet been reviewed.

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Home Resource Center News Flashes Company Directory

Loan Number 64003069, John Sample Floating

✓ Setup Received 05/14/2019 ✓ Submitted to UW 05/14/2019 ✓ Approved with Conditions 05/14/2019 ✓ Early CD Eligible 05/14/2019 UW Final Approved Ready for Docs Purchased

Time to order your CD through the CD Request tab! Continue to upload the remaining conditions in bulk or directly into the condition in the Conditions tab to get your Clear to Close from Underwriting!

Loan Details Pricing/Lock Upload / Conditions CD Request Get Forms / Files Messages Exception Requests

Conditions For a Printer Friendly Condition List Click Here Refresh

Would you like to upload all documents as a single file?

Conditions can be reviewed and uploaded here in bulk, or individually. Once uploaded, the condition will show as Received which puts the document in line for review by the employee assigned to the role under "To Be Reviewed By".

The "Code" legend:
U = Prior to Underwriting.
A = Prior to Approval.
E = Prior to Early Closing Disclosure being able to be requested.
D = Prior to Docs being able to be requested.
F = Prior to Funding.
P = Prior to Purchase.

Code	#	Received	Status	For	Reviewed By	Condition
D	6	Upload	Received	Q	Closer	Provide appraisal acknowledgement form, indicating the borrower received a copy of the appraisal (cannot be dated prior to the appraiser's signature date as reflected on the actual appraisal) -OR- provide executed 3 day waiver disclosure (may be dated at any time).

View Conditions Status

On to see the date the document was received click on the Chevron

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Home Resource Center News Flashes Company Directory

Loan Number 64003069, John Sample Floating

✓ Setup Received 05/14/2019 ✓ Submitted to UW 05/14/2019 ✓ Approved with Conditions 05/14/2019 ✓ Early CD Eligible 05/14/2019 UW Final Approved Ready for Docs Purchased

Time to order your CD through the CD Request tab! Continue to upload the remaining conditions in bulk or directly into the condition in the Conditions tab to get your Clear to Close from Underwriting!

← Loan Details Pricing/Lock Upload / Conditions CD Request Get Forms / Files Messages Exception Requests →

Conditions For a Printer Friendly Condition List Click Here Refresh

Would you like to upload all documents as a single file? 📁


Conditions can be reviewed and uploaded here in bulk, or individually. Once uploaded, the condition will show as Received which puts the document in line for review by the employee assigned to the role under "To Be Reviewed By".

The "Code" legend:
U = Prior to Underwriting.
A = Prior to Approval.
E = Prior to Early Closing Disclosure being able to be requested.
D = Prior to Docs being able to be requested.
F = Prior to Funding.
P = Prior to Purchase.

	Code	#	Received	Status	For	Reviewed By	Condition
▼	D	6	Upload	Received	🔍	Closer	Provide appraisal acknowledgement form, indicating the borrower received a copy of the appraisal (cannot be dated prior to the appraiser's signature date as reflected on the actual appraisal) -OR- provide executed 3 day waiver disclosure (may be dated at any time).

View Conditions Status


On to see the date the document was received click on the Chevron

Code	#	Received	Status	For	Reviewed By	Condition
	D	6	Upload	Received	Closer	Provide appraisal acknowledgement form, indicating the borrower received a copy of the appraisal (cannot be dated prior to the appraiser's signature date as reflected on the actual appraisal) -OR- provide executed 3 day waiver disclosure (may be dated at any time).

Document Tracking Details			
Date Ordered		Re-Ordered	
Expecting Date		Last Received	05/20/2019 12:31:34
Signed Off		Expires	
Remarks:			

View Conditions Status

Alternatively, you can click on the paper log icon to see the uploads, their status of success or failure, and the date time of upload.

Code	#	Received	Status	For	Reviewed By	Condition
	6	Upload	Received	Q	Closer	Provide appraisal acknowledgement form, indicating the borrower received a copy of the appraisal (cannot be dated prior to the appraiser's signature date as reflected on the actual appraisal) -OR- provide executed 3 day waiver disclosure (may be dated at any time).

Document Tracking Details			
Date Ordered		Re-Ordered	
Expecting Date		Last Received	05/20/2019 12:31:34
Signed Off		Expires	
Remarks:			

View Conditions Status

Alternatively, you can click on the paper log icon to see the uploads, their status of success or failure, and the date time of upload.

Provide appraisal acknowledgement form, indicating the borrower received a copy of the appraisal (cannot be dated prior to the appraiser's signature date as reflected on the actual appraisal) -OR- provide executed 3 day waiver disclosure (may be dated at any time).

Status	File Name	Date Time	Last Msg
✓ Success	Title Report Review.pdf	2019-05-20 10:31:35	Successfully Uploaded
✓ Success	Title Report Review.pdf	2019-05-20 10:29:12	Successfully Uploaded

Clear Logs Close

Would you like to upload all documents a

Conditions can be reviewed and upload which puts the document in line for review

The "Code" legend:
U = Prior to Underwriting.
A = Prior to Approval.
E = Prior to Early Closing Disclosure being able to be requested.
D = Prior to Docs being able to be requested.
F = Prior to Funding.
P = Prior to Purchase.

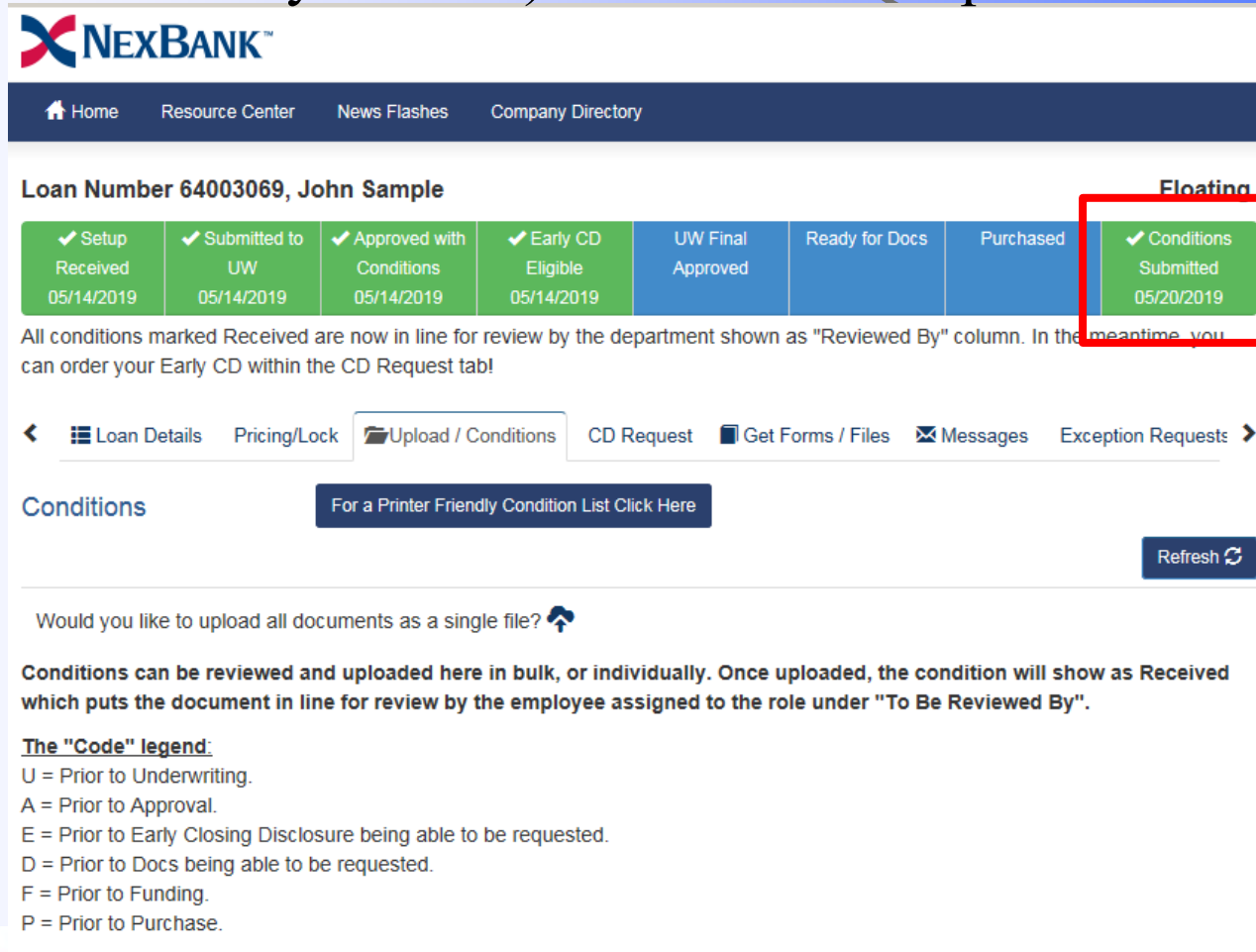
Code	#	Received	Status	For	Reviewed By	Condition
D	6	Upload	Received	Q	Closer	Provide appraisal acknowledgement form, indicating the borrower received a copy of the appraisal (cannot be dated prior to the appraiser's signature date as reflected on the actual appraisal) -OR- provide executed 3 day waiver disclosure (may be dated at any time).

Document Tracking Details

Date Ordered	Re-Ordered
Expecting Date	Last Received 05/20/2019 12:31:34

View Conditions Status

If you upload a document to a bucket where a user is assigned who can clear the condition (the Reviewed by column) the status will update to Conditions Submitted.



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Home Resource Center News Flashes Company Directory

Loan Number 64003069, John Sample Floating

✓ Setup Received 05/14/2019	✓ Submitted to UW 05/14/2019	✓ Approved with Conditions 05/14/2019	✓ Early CD Eligible 05/14/2019	UW Final Approved	Ready for Docs	Purchased	✓ Conditions Submitted 05/20/2019
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All conditions marked Received are now in line for review by the department shown as "Reviewed By" column. In the meantime, you can order your Early CD within the CD Request tab!

← Loan Details Pricing/Lock Upload / Conditions CD Request Get Forms / Files Messages Exception Requests →

Conditions [For a Printer Friendly Condition List Click Here](#) [Refresh](#)

Would you like to upload all documents as a single file?


Conditions can be reviewed and uploaded here in bulk, or individually. Once uploaded, the condition will show as Received which puts the document in line for review by the employee assigned to the role under "To Be Reviewed By".

The "Code" legend:
U = Prior to Underwriting.
A = Prior to Approval.
E = Prior to Early Closing Disclosure being able to be requested.
D = Prior to Docs being able to be requested.
F = Prior to Funding.
P = Prior to Purchase.

View Conditions Type





Each condition has a code which indicates where in the process it must be completed by.

Conditions For a Printer Friendly Condition List C

Would you like to upload all documents as a single file? 

Conditions can be reviewed and uploaded here in bulk, or individually which puts the document in line for review by the employee as

The "Code" legend:
U = Prior to Underwriting.
A = Prior to Approval.
E = Prior to Early Closing Disclosure being able to be requested.
D = Prior to Docs being able to be requested.
F = Prior to Funding.
P = Prior to Purchase.

	Code	#	Received	Status	For	
▼ 	D	1	Upload	Received	 Seacoast National Bank, Colorado Br, John Sample	
▼ 	D	6	Upload	Received		
▼	F	0	Upload			

View Conditions Type

Here are all the completion codes you might encounter:

- U = Prior to Underwriting.
- A = Prior to Approval.
- E = Prior to Early Closing Disclosure being able to be requested.
- D = Prior to Docs being able to be requested.
- F = Prior to Funding.
- P = Prior to Purchase.
- M = Miscellaneous

Request an Exception

Navigate to the “Exception Requests” tab and click on “Request Exception”.

The screenshot displays the NEXBANK website interface for a loan with number 64003069, owned by John Sample. The loan status is 'Floating'. A progress bar shows the following steps: Setup Received (05/14/2019), Submitted to UW (05/14/2019), Approved with Conditions (05/14/2019), UW Final Approved (05/14/2019), Closing Package Received, and Purchased. A message below the progress bar states: 'Clear to Close! Please upload your completed closing package and all closing related documents in the "Conditions" tab in bulk and when you are ready to submit the loan for Pre-Purchase review, go to the "Submit for Purchase" tab and click Submit!'. The navigation menu includes: Home, Resource Center, News Flashes, Company Directory, Submit for Purchase, Closing Request, Get Forms / Files, Messages, and Exception Requests (highlighted with a red box). Below the navigation menu, the 'Exception Requests' section is visible, with a 'Request Exception' button (highlighted with a red box) and a table for tracking requests.

Date	Exception Request	Decision	Decision Reason	Decision Date
------	-------------------	----------	-----------------	---------------

Request an Exception

Complete the form and click “Submit Request”

Loan Number 64003069, John Sample Floating

✓ Setup Received 05/14/2019	✓ Submitted to UW 05/14/2019	✓ Approved with Conditions 05/14/2019	✓ UW Final Approved 05/14/2019	Closing Package Received	Purchased
--------------------------------	---------------------------------	---	-----------------------------------	-----------------------------	-----------

Clear to Close! Please upload your completed closing package and all closing related documents in the "Conditions" tab in bulk and when you are ready to submit the loan for Pre-Purchase review, go to the "Submit for Purchase" tab and click Submit!

← ons [Submit for Purchase](#) [Closing Request](#) [Get Forms / Files](#) [Messages](#) **Exception Requests** →

Please enter your exception request information below and press "Submit Request" in order to have the exception escalated to management for review. We will be in contact with you upon making a decision.

📅 Exception Request Date: Department:

Change Items		
	Current Value	Requested Value
Exception Request		<input type="text"/>
Compensating Factors		<input type="text"/>

Early CD Request

If there is no date or checkmark in the Early CD Eligible box, then you still have conditions that have not been signed off, which are required before you can request your early CD.

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Loan Number 64003069, John Sample Floating

✓ Setup Received 05/14/2019	✓ Submitted to UW 05/14/2019	✓ Approved with Conditions 05/14/2019	✓ Early CD Eligible 05/14/2019	UW Final Approved	Ready for Docs	Purchased
--------------------------------	---------------------------------	---	-----------------------------------	-------------------	----------------	-----------

Time to order your CD through the CD Request tab! Continue to upload the remaining conditions in bulk or directly into the condition in the Conditions tab to get your Clear to Close from Underwriting!

← Loan Details Pricing/Lock Upload / Conditions **CD Request** Get Forms / Files Messages Exception Requests →

CD Request

Please complete the following information in order to request your Closing Disclosure from the closing department.

Change Request Date:

Change Items		Current Value	Requested Value
Will a POA be used in this transaction?	No		<input type="text" value=""/>

Early CD Request

Your loan is eligible for us to disclose the Early CD when all of the conditions of type A, U, and E are signed off. When that happens the “CD Request” tab will appear.

The screenshot shows the NEXBANK loan management interface for Loan Number 64003069, John Sample. The loan status is 'Floating'. A progress bar shows the following steps: Setup Received (05/14/2019), Submitted to UW (05/14/2019), Approved with Conditions (05/14/2019), Early CD Eligible (05/14/2019), UW Final Approved, Ready for Docs, and Purchased. A message indicates it is time to order the CD through the CD Request tab. The 'CD Request' tab is highlighted with a red box. Below the navigation bar, the 'CD Request' section is active, showing a 'Change Request Date' of 05/17/2019 and a table for 'Change Items'.

	Current Value	Requested Value
Will a POA be used in this transaction?	No	<input type="text"/>

Early CD Request

Navigate to the CD Request tab, complete the form and click “Submit Request”.

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Home Resource Center News Flashes Company Directory

Loan Number 64003069, John Sample Floating

✓ Registered 05/14/2019	✓ Setup Received 05/14/2019	✓ Submitted to UW 05/14/2019	✓ Approved with Conditions 05/14/2019	UW Final Approved	Closing Package Received	Purchased
----------------------------	--------------------------------	---------------------------------	---	-------------------	-----------------------------	-----------

APPROVED! Upload your conditions directly into the condition for the fastest service, or feel free to upload in bulk and we will sort all the conditions for you.

< | DU Retrieval Pricing/Lock Upload / Conditions Submit Loan **CD Request** Get Forms / Files Messages >

CD Request

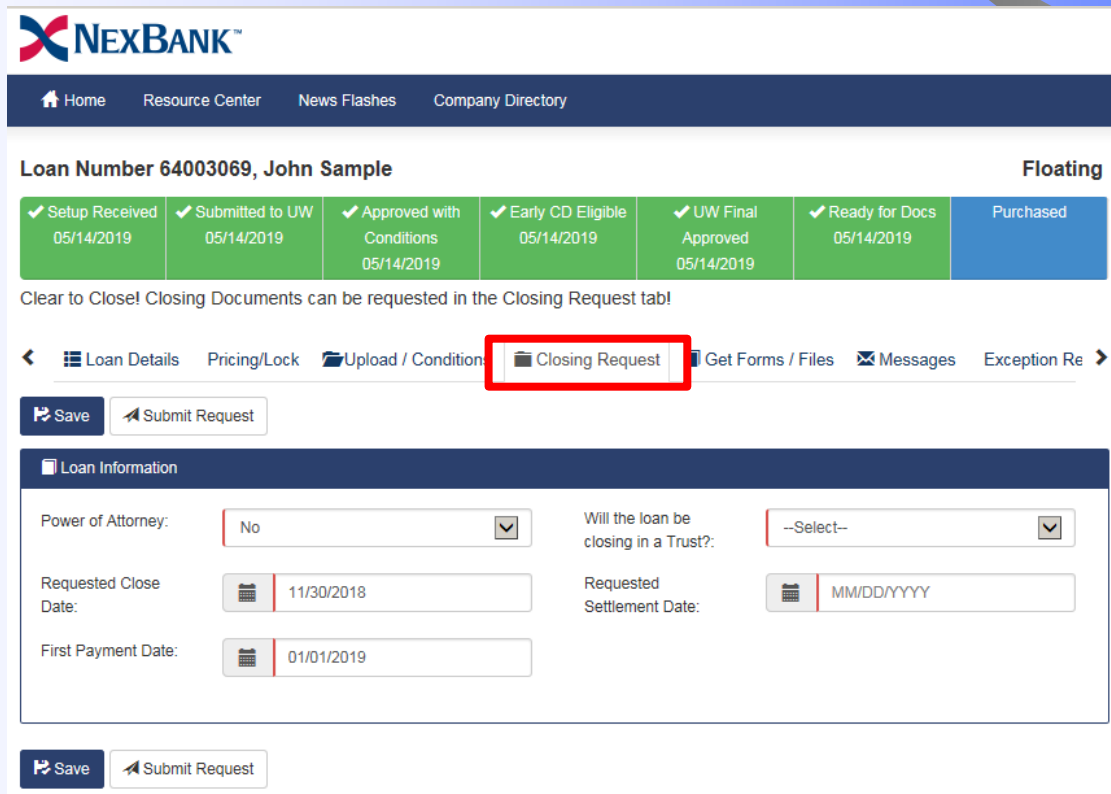
Please complete the following information in order to request your Closing Disclosure from the closing department.

Change Request Date:

Change Items		Current Value	Requested Value
Will a POA be used in this transaction?	No		<input type="text" value=""/>
Will this loan be closing in a Trust?			<input type="text" value=""/>
Last Disclosed LE Issued Date			<input type="text" value="MM/DD/YYYY"/>
Requested Closing Date	11/30/2018		<input type="text" value="MM/DD/YYYY"/>
First Payment Date	01/01/2019		<input type="text" value="MM/DD/YYYY"/>
Requested Settlement Date			<input type="text" value="MM/DD/YYYY"/>

Closing Request

You will be eligible to complete the closing request when all conditions of type A, U, E, and D have been signed off and the underwriter has Underwriting Final Approved your loan.



The screenshot displays the NexBank loan management interface for a loan with the number 64003069, owned by John Sample. The loan is currently in a 'Floating' state. A progress bar at the top shows the following status: Setup Received (05/14/2019), Submitted to UW (05/14/2019), Approved with Conditions (05/14/2019), Early CD Eligible (05/14/2019), UW Final Approved (05/14/2019), Ready for Docs (05/14/2019), and Purchased. A message indicates that closing documents can be requested in the Closing Request tab. The navigation menu includes Loan Details, Pricing/Lock, Upload / Conditions, Closing Request (highlighted with a red box), Get Forms / Files, Messages, and Exception Re. Below the navigation, there are 'Save' and 'Submit Request' buttons. The 'Loan Information' section contains the following fields: Power of Attorney (No), Will the loan be closing in a Trust? (--Select--), Requested Close Date (11/30/2018), Requested Settlement Date (MM/DD/YYYY), and First Payment Date (01/01/2019). At the bottom, there are again 'Save' and 'Submit Request' buttons.

Setup Received	Submitted to UW	Approved with Conditions	Early CD Eligible	UW Final Approved	Ready for Docs	Purchased
05/14/2019	05/14/2019	05/14/2019	05/14/2019	05/14/2019	05/14/2019	

Clear to Close! Closing Documents can be requested in the Closing Request tab!

Navigation: Loan Details | Pricing/Lock | Upload / Conditions | **Closing Request** | Get Forms / Files | Messages | Exception Re

Buttons: Save | Submit Request

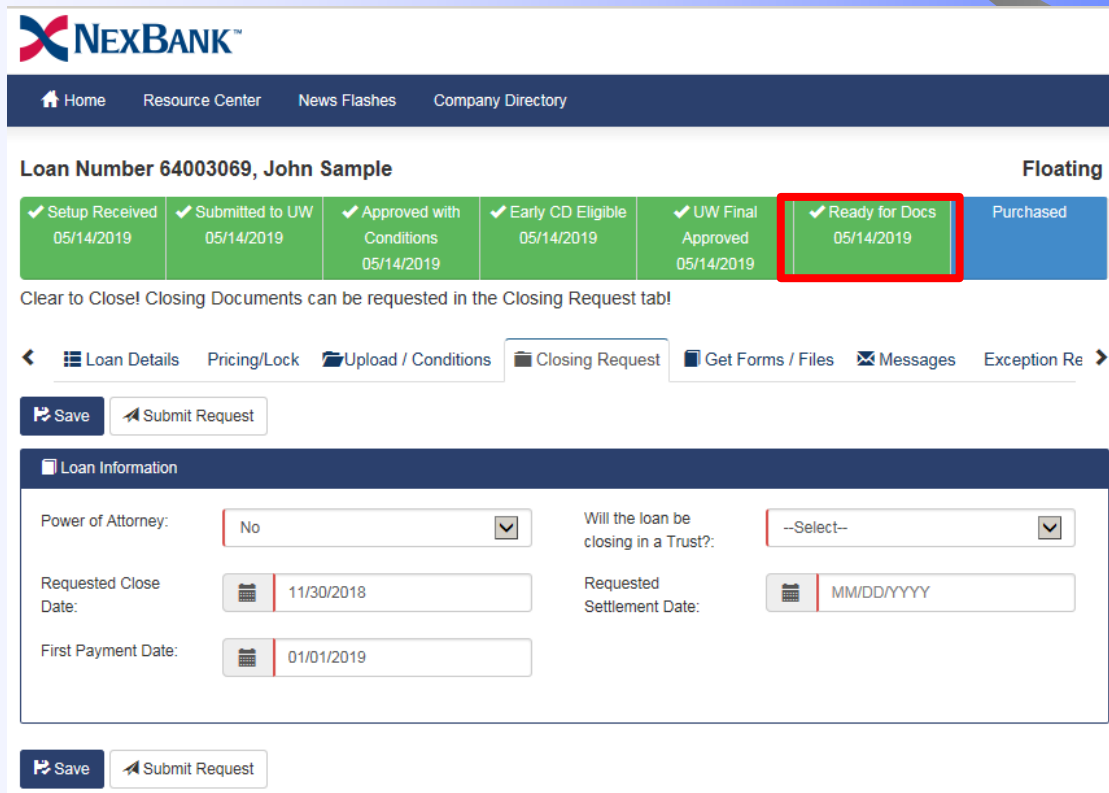
Loan Information

Power of Attorney:	No	Will the loan be closing in a Trust?:	--Select--
Requested Close Date:	11/30/2018	Requested Settlement Date:	MM/DD/YYYY
First Payment Date:	01/01/2019		

Buttons: Save | Submit Request

Closing Request

If there is no date or checkmark in the “Ready for Docs” status box, then you still have conditions that have not been signed off, which are required before ordering your closing documents.



The screenshot displays the NEXBANK loan management interface for Loan Number 64003069, John Sample. The interface includes a navigation bar with links for Home, Resource Center, News Flashes, and Company Directory. Below the navigation bar, the loan details are shown, including the loan number and name. A status bar indicates the loan is 'Floating' and lists several completion steps: Setup Received (05/14/2019), Submitted to UW (05/14/2019), Approved with Conditions (05/14/2019), Early CD Eligible (05/14/2019), UW Final Approved (05/14/2019), and Ready for Docs (05/14/2019). The 'Ready for Docs' status box is highlighted with a red border. Below the status bar, there is a message: 'Clear to Close! Closing Documents can be requested in the Closing Request tab!'. The interface also features a navigation menu with options like Loan Details, Pricing/Lock, Upload / Conditions, Closing Request, Get Forms / Files, Messages, and Exception Re. At the bottom, there are 'Save' and 'Submit Request' buttons.

Status	Date
✓ Setup Received	05/14/2019
✓ Submitted to UW	05/14/2019
✓ Approved with Conditions	05/14/2019
✓ Early CD Eligible	05/14/2019
✓ UW Final Approved	05/14/2019
✓ Ready for Docs	05/14/2019
Purchased	

Clear to Close! Closing Documents can be requested in the Closing Request tab!

Loan Information

Power of Attorney:	<input type="text" value="No"/>	Will the loan be closing in a Trust?:	<input type="text" value="--Select--"/>
Requested Close Date:	<input type="text" value="11/30/2018"/>	Requested Settlement Date:	<input type="text" value="MM/DD/YYYY"/>
First Payment Date:	<input type="text" value="01/01/2019"/>		

Closing Request

Navigate to the tab, complete the request form and click “Submit Request”.

NEXBANK™

Home Resource Center News Flashes Company Directory

Loan Number 64003069, John Sample **Floating**

✓ Setup Received 05/14/2019	✓ Submitted to UW 05/14/2019	✓ Approved with Conditions 05/14/2019	✓ Early CD Eligible 05/14/2019	✓ UW Final Approved 05/14/2019	✓ Ready for Docs 05/14/2019	Purchased
--------------------------------	---------------------------------	---	-----------------------------------	--------------------------------------	--------------------------------	-----------

Clear to Close! Closing Documents can be requested in the Closing Request tab!

← Loan Details Pricing/Lock Upload / Conditions **Closing Request** Get Forms / Files Messages Exception Re →

Save Submit Request

Loan Information

Power of Attorney:	No	Will the loan be closing in a Trust?:	--Select--
Requested Close Date:	11/30/2018	Requested Settlement Date:	MM/DD/YYYY
First Payment Date:	01/01/2019		

Save Submit Request

Submit For Purchase Request

If you have opted to close your own loan the “Submit for Purchase” tab will become available once you’ve reached UW Final Approved status and you’ve uploaded your package to the bulk upload bucket.

(you will need to refresh your browser after the document upload)

NEXBANK™ Welcome: **Robert Test** [Logout](#)

[Home](#) [Resource Center](#) [News Flashes](#) [Company Directory](#)

Loan Number 64003069, John Sample **Floating**

✓ Setup Received 05/14/2019	✓ Submitted to UW 05/14/2019	✓ Approved with Conditions 05/14/2019	✓ UW Final Approved 05/14/2019	Closing Package Received	Purchased
--------------------------------	---------------------------------	---	-----------------------------------	-----------------------------	-----------

Clear to Close! Please upload your completed closing package and all closing related documents in the "Conditions" tab in bulk and when you are ready to submit the loan for Pre-Purchase review, go to the "Submit for Purchase" tab and click Submit!

[Loan Details](#) [Pricing/Lock](#) [Upload / Conditions](#) **[Submit for Purchase](#)** [Closing Request](#) [Get Forms / Files](#)

Have all conditions been submitted?

Loan Search

Enter Loan Number

Enter Last Name

Receive an **extra 0.125% in price** on all **Conventional Fixed Rate Loans** with a 720+ FICO

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