



How to Upload Conditions (The easy way!)

As of 6/1/2016, our conditional approval notices are now listing numbered conditions. The first reaction by the LO or Processor is usually not positive as they believe that each condition will have to be scanned separately. Although this will work...it is a time consuming process. FSB is all about efficiency and we would not create a process that adds to your work load. We want to make closing loans with us simple and fast. With that in mind, please use these steps to upload your conditions in the most efficient manner possible.

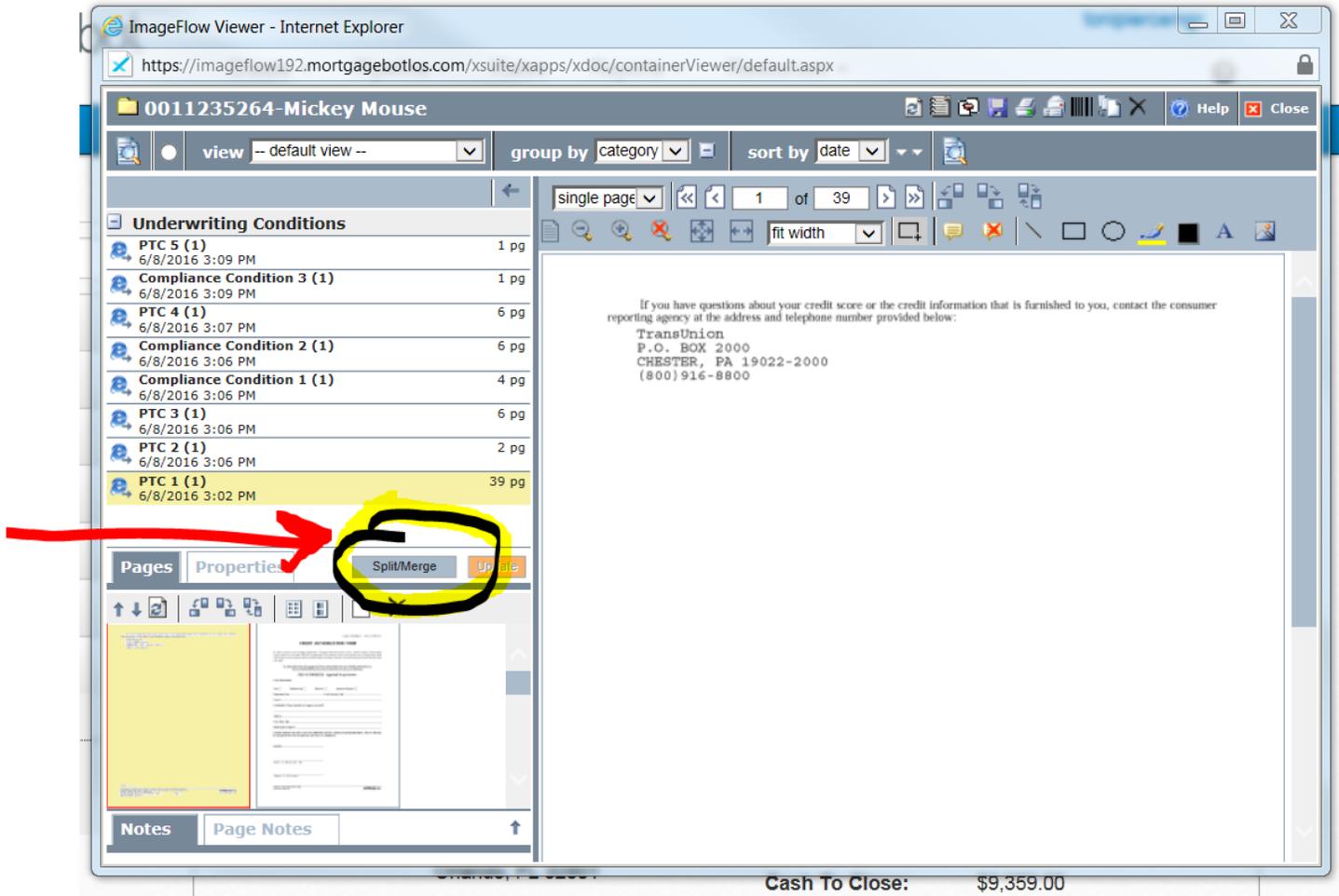
Step 1: Number your conditions to match the Conditional Approval.

This will become important when viewing them within Imageflow in the next couple of steps.

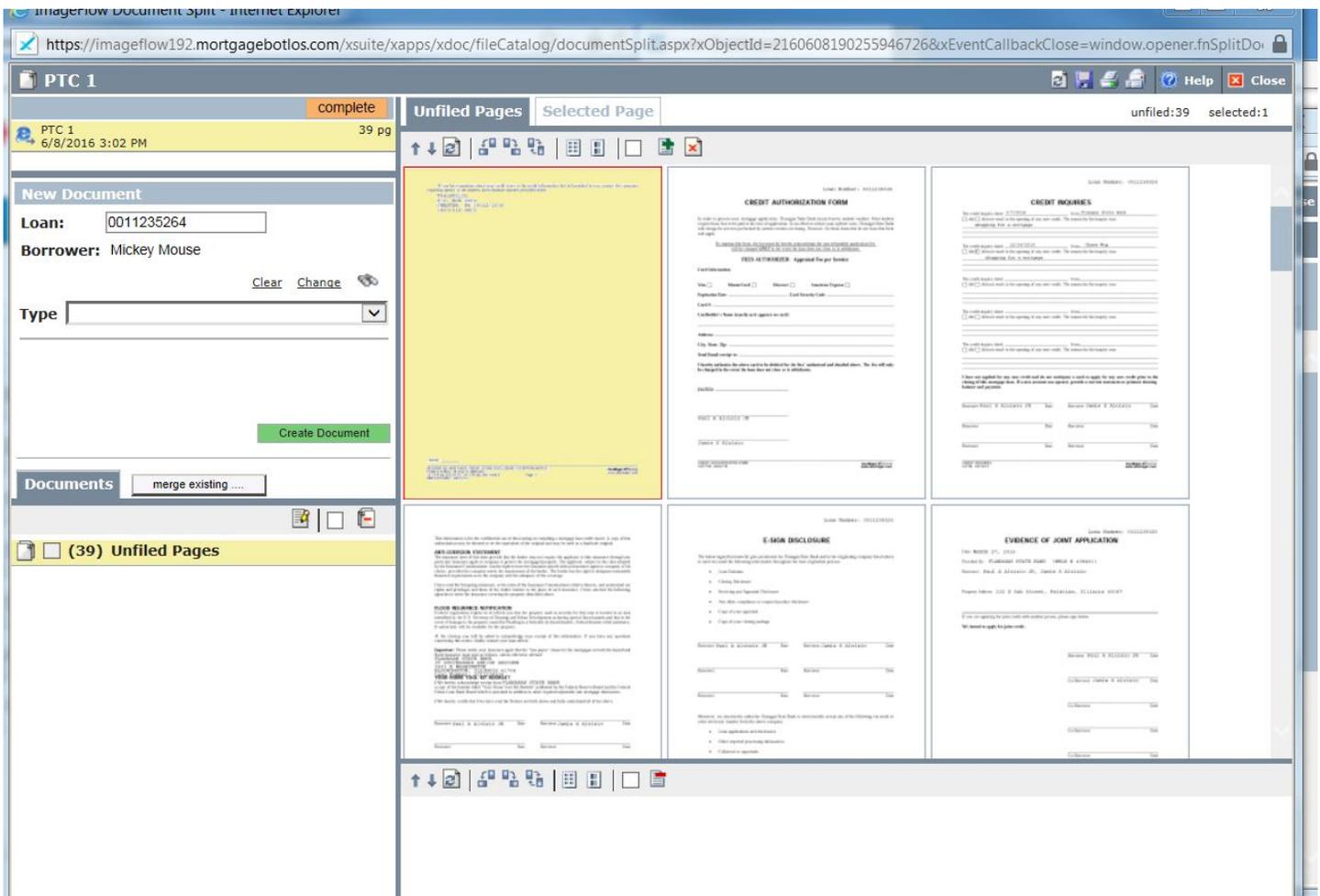
Step 2: Upload your conditions in one scan and preferably in the order listed on the Conditional Approval.

Upload to PTC1 for now. This will include compliance conditions and PTC conditions. We do like to get as many conditions from both sections as possible at one time. This allows us to clear the loan faster and keep additional conditions from being needed.

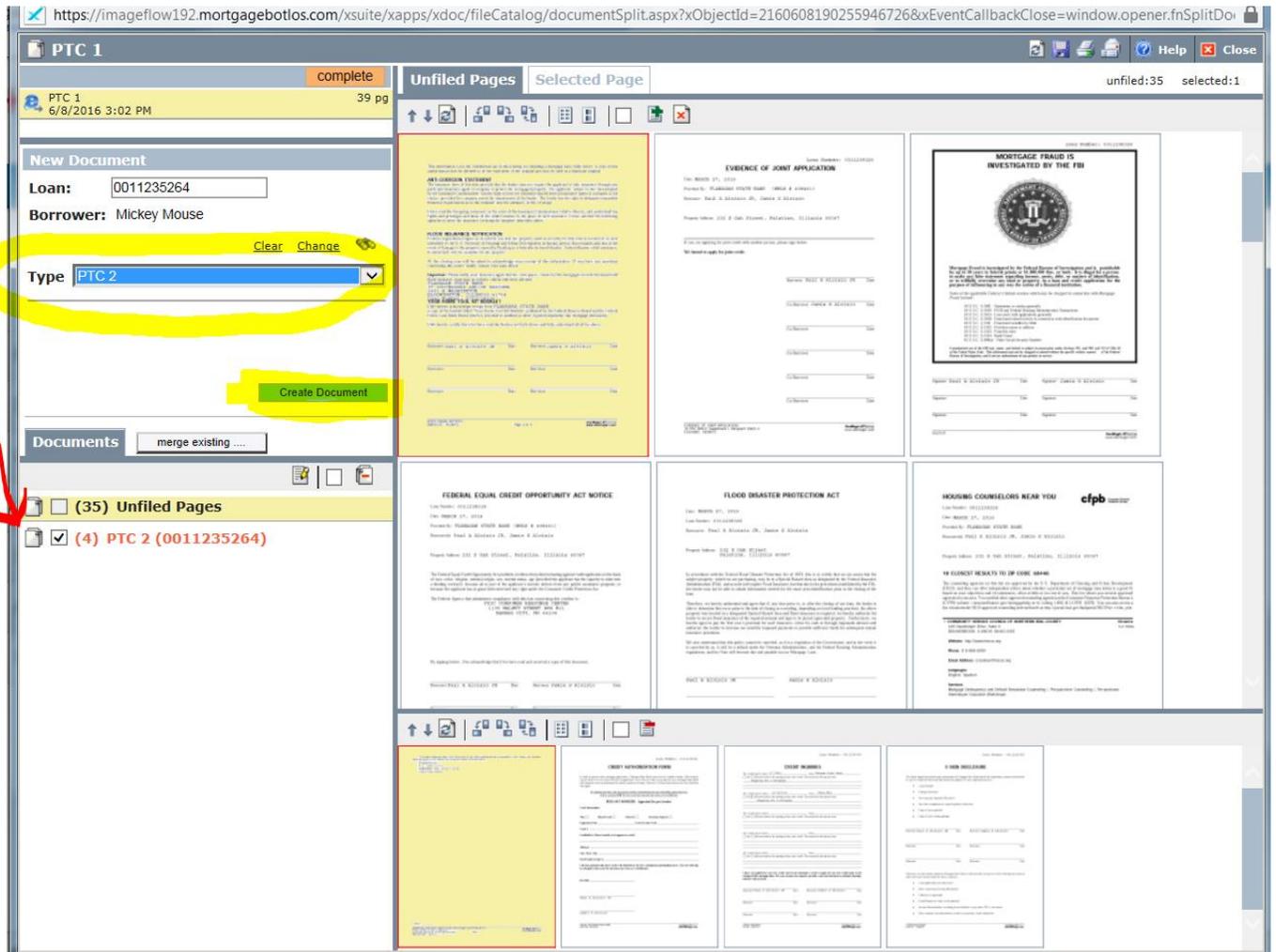
Step 3: Click on PTC1 where you placed your upload and then click on split/merge.



A new screen will pop up and will allow you to "sort" the conditions under the appropriate Compliance or PTC number.

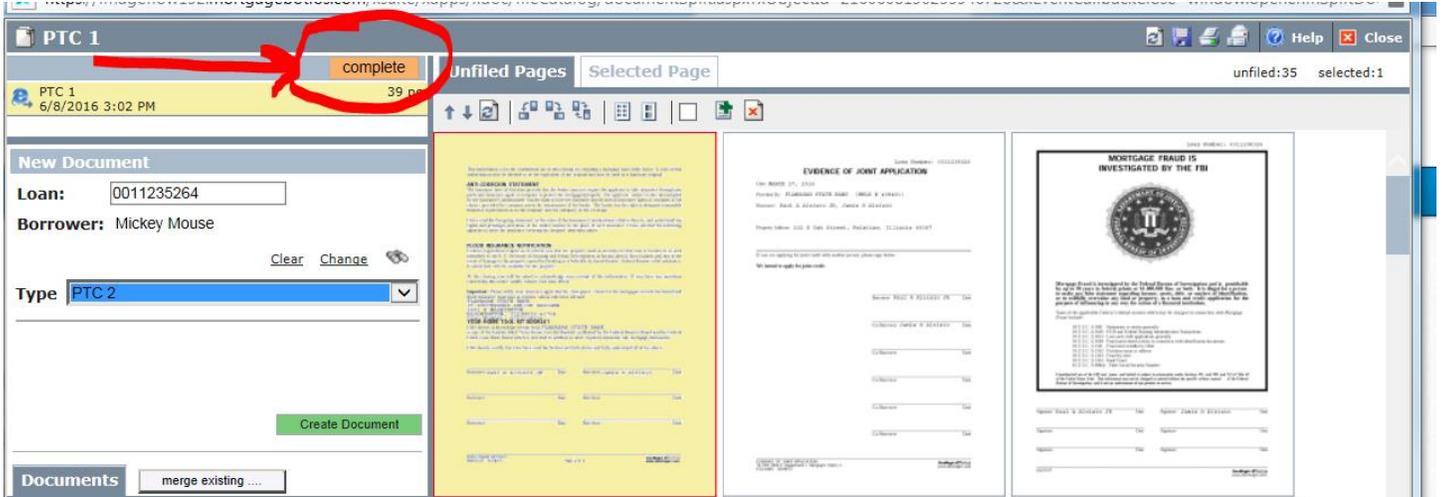


Step 4: Begin sorting the conditions. Hold the ctrl button while choosing multiple pages and only choose the pages you need for the next condition you will label. When a page is chosen, it will highlight in a red outline:



For each condition you have uploaded, repeat this to label appropriately. Compliance conditions will have their own labels.

When you have completed the sorting of the conditions be sure to click at the top of the screen COMPLETE.



You will see all your sorted documents in Imageflow when this is done. The file is ready to go back to underwriting!
Don't forget to click FINAL under ACTIONS.

IMPORTANT: If you are uploading conditions to meet a suspense or verify that a condition will not cause the file to be denied, please make a note to underwriter in the file to identify this. Otherwise, we will return the file to you due to not having the majority of the conditions to review.