



Click n' Close™, Inc.
Mortgage

HOW TO
SUBMIT
CONDITIONS
INTO
MORTGAGE
MACHINE

MAM allows 2 options for submitting conditions.

1st Option: We'll allow you to email the conditions directly to your Account Manager (Please copy your AE). Use the loan number and last name of the borrower in the subject line.

2nd Option: Upload the conditions directly into the subject file within our system (Mortgage Machine). This is the most secure way of protecting your borrower information. Below are instructions for uploading the conditions.

-Log in...open your file (make sure it says Active Loan).-

The screenshot displays the web application interface for Click n' Close, Inc. The top navigation bar is purple and contains the company name, a user greeting, and links for Site Map, Support, and Log Out. Below this is a secondary navigation bar with menu items: Home, Loan, Origination, Interfaces, Underwriting, Doc Prep, Post-Closing, and Reports. The main content area is titled 'Home Page' and features a sidebar with buttons for Home, Loan Reports, Loan Information (highlighted), Contacts, Bulletins and Resources, and Your Information. The central 'Active Loan' section includes a table with loan details and a list of actions. A red arrow points to the 'Active Loan' header.

Active Loan		[Import Data Close Loan]	
Loan Number		Estimated Close Date	7/29/2022
Borrower Name		Estimated Funding Date	7/29/2022
Loan Status		Business Channel	Wholesale

- Product Lookup / Lock
- Submit to Underwriting
- Order Closing Documents
- URLA Lender Loan Information
- Overview and Assignments
- Underwriting Transmittal
- Loan Status
- URLA Borrower Information
- Pipeline and Loan Reports
- Reporting

XDOC View Upload Multiple Upload in XDoc [Manager]

Once in the file and are ready to upload:
Look for..."Upload Multiple" or "Upload Documents"

Click n' Close, Inc. Welcome, | Site Map | Support [Log Out](#)

Home | Loan | Origination | Interfaces | Underwriting | Doc Prep | Post-Closing | Reports

Home Page Wednesday, August 24, 2022 12:16:51 PM (1032)

Home
Loan Reports
Loan Information
Contacts
Bulletins and Resources
Your Information

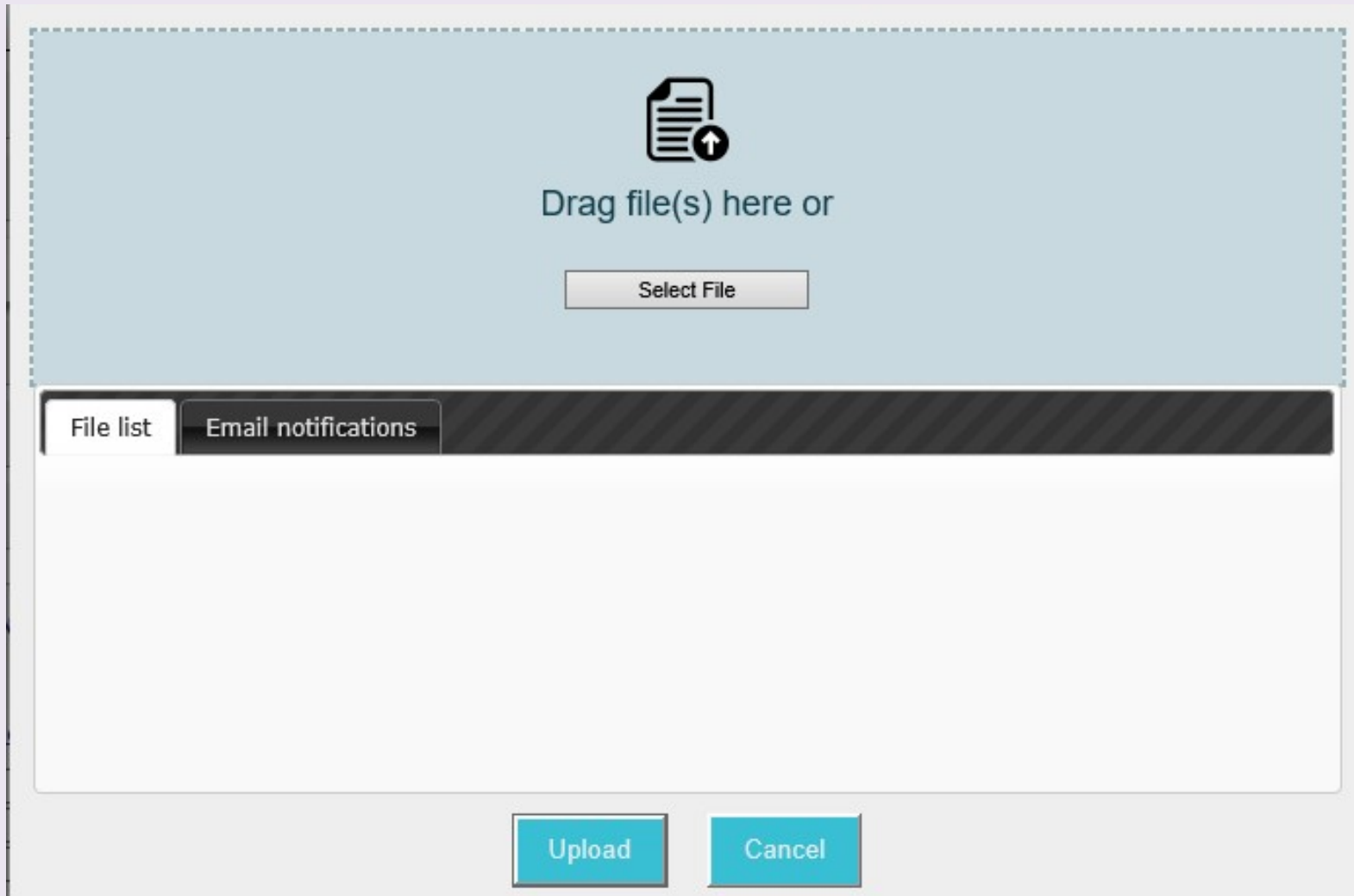
Active Loan [\[Import Data\]](#) [\[Close Loan\]](#)

Loan Number	Estimated Close Date	7/29/2022
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XDOC [View](#) [Upload Multiple](#) [Upload in XDoc \[Manager\]](#)

If you select the “Upload Multiple” link, you should see the following (you can drag and drop or choose the select file bar). You may even click if you want email notification on these items.



If you choose the “Upload Documents” link, you should see the following screen: **DO NOT click on document type!** Click Browse to get the documents needed for uploading/submitting. Choose the upload in color box only for appraisals.

Project: Loan Documents Help Close

Document Upload

File Information

File To Upload Browse...

Upload in Color

Assign To Loan

Loan: Change

Borrower: Br1 Test Clear

Document Information

Document Type

Submit Reset

Once you finish and submit, you should see a message that your upload was successful.

Now that the documents have been uploaded, you'll need to let us know that conditions have been submitted. Click on the "Submit to Underwriting" link below.

Click n' Close, Inc. Welcome, | Site Map | Support [Log Out](#)

Home | Loan | Origination | Interfaces | Underwriting | Doc Prep | Post-Closing | Reports

Wednesday, August 24, 2022 12:16:51 PM (1032)

Home Page

- Home
- Loan Reports
- Loan Information**
- Contacts
- Bulletins and Resources
- Your Information
- Register a... [New Loan](#) | [New Lead](#)

Active Loan

[\[Import Data\]](#) | [\[Close Loan\]](#)

Loan Number	Estimated Close Date	7/29/2022
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XDOC | [View](#) | [Upload Multiple](#) | [Upload in XDoc \[Manager\]](#)

The Submission screen should resemble the following:
You can type notes to the underwriter if you'd like. Once that is completed, click the "Submit to Underwriting" button on the bottom left.

The screenshot displays a web interface for submission information. At the top, a dark header bar contains the text "Submission Information". Below this, the form is organized into several sections:

- Selected Product:** CONF 30 [Change Product]
- LO Comp Source:** Lender (dropdown menu) LO Compensation: 2.000% / \$1,400.00
- Notes to the Underwriter:** A large empty text area.
- Submission Type:** (dropdown menu)
- FNMA Day One Certainty:** (dropdown menu)
Full = All borrowers
Partial = At least one borrower
None = Not Day One
- Documents for Review:** XDoc Images
No documents have been added for underwriting review.
[Upload New Documents](#)

At the bottom of the form, a dark header bar contains the text "Data Check and Submission". Below this, the status is "No rule violations were found." with links for [Refresh List](#) and [Report Incorrect Error Message\(s\)](#).

A red arrow originates from the text "Submit to Underwriting" in the instructions and points to a purple button labeled "Submit to Underwriting" at the bottom left of the form, which is circled in red.

After clicking you should see a confirmation that it was done successfully.