

Broker Portal Guide

MANAGING CONDITIONS

Managing conditions is as easy as 1, 2, 3!

Step 1. Organize PDF conditions on your desktop.

Step 2. Attach each PDF to the corresponding condition by clicking **Browse** or **Drag & Drop**.

Step 3. Once the process is complete, click **Submit to Condition Review**.

NOTE: There is a time delay between the broker portal and our LOS system when the “**Submit to Condition Review**” button is clicked.



You will receive an email notification with an upload confirmation once the systems sync.

1

Click Browse button to find PDF **Or** Drag and Drop PDFs. **Add additional PDFs to any condition by repeating this process.**

2

Once you have attached conditions, click **Submit to Condition Review**.

Underwriting Conditions

Drag/Drop or Browse for a file to match an individual condition below.
Submit to condition review is only available when loan is in "Approved" or "Suspended" status.

Prior To Docs "PTD" Conditions	Status	Status Date
7 Complete escrow instructions including vesting	Active	
12 Appraisal on Fannie Mae form specific to property type from an approved AMC with appraisers license, E&O, AIR Cert and invoice.	Active	
14 Provide all applicable fee invoices (i.e.. credit report, survey, appraisal) for them to be paid on the CD	Active	
15 Inquiry letter signed by the borrower(s) addressing all inquiries within the past 90 days. If any new debt(s) have been established provide documentation supporting balance and payment.	Active	

3

LO/Processor will receive confirmation via email once systems sync.

CLEAREDGE LENDING

STATUS UPDATE

Hello Lance,
Thank you for uploading your conditions! Our team will review as soon as possible.

LOAN DETAILS:
Loan Number: 2019100067
Borrower Last Name: SAMPLE
Property Address: 222 FRIENDLY AVENUE

Feel free to contact your Account Manager with questions:
Steve Account Manager
(760) 550-0794
baustin@clearedgelending.com



Can't remember what you uploaded? Scroll to the bottom of the Conditions screen to view a history of uploaded conditions. Click the document to view the PDF for each condition.