JETMORTGAGE

How to Upload Conditions and Access Documents Guide

Step: 1

- After logging into the portal, click on your **'PIPELINE'** this is where you can access all loans you have with Jet Mortgage.

- After clicking into the desired loan, you will see the screen to the right. Here you can click into the desired tab as needed in the blue column.

- **Status and Agents** will provide you with the current status of the loan and contacts assigned to the loan.

- **E-docs** tab will allow you to search for ANY document that has been uploaded to the file.

- **Conditions** will allow you to view all conditions needed on the loan.

Once you are inside the loan click on **Conditions** tab near the bottom left.

Step: 2

- To upload a document you can do one of two ways. You can 'DRAG AND DROP FILES HERE' or you can 'SELECT FILES TO UPLOAD' from your desktop.

- Once you have selected the document, you can then LABEL the document by SLECTING DOC TYPE.

Upload Docs   Fax Docs   Document List

You may upload up to 12 documents at a time with a total upload size of 100MB.

Jet_How to Upload Conditions and Access Documen

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Drag and Drop Files Here to Upload

OR SELECT FILES TO UPLOAD

1 of 12 files selected for upload

File Name	Doc Type *	Description
Jet_How to Upload Conditions and Access Documents Guide 0423.pdf	[select Doctype] scan barcodes	

0 of 200 characters

Step: 2 Cont.

- Click on 'SELECT DOC TYPE' and search unclassified.

Select a Doc Type   X

Search for: [   ] SEARCH 🔍

Matching Doc Types:

Doc Type	Folder
UNCLASSIFIED	UNCLASSIFIED
BORROWER UPLOAD	UNCLASSIFIED
FLOOD CERTIFCIATION	UNCLASSIFIED
IDXPRESS REPORT	UNCLASSIFIED
UNASSIGNED DOCUMENT TYPE	UNCLASSIFIED

Step: 2 Cont.

○ Once the Doc Type has been selected you will be taken back out to the 'Upload Docs' screen

○ Here you can add and additional description in the highlighted box (any notes you think will help your Account Manager or UW).

○ Once done click 'UPLOAD DOCUMENT'

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1 of 12 files selected for upload

File Name	Doc Type *	Description
Jet_How to Upload Conditions and Access Documents Guide 0423.pdf	[select Doctype] scan barcodes UNCLASSIFIED : UNCLASSIFIED	

0 of 200 characters

UPLOAD DOCS

Step 3

Lastly, Send an email to your AE and AM alerting them that the file is ready for review