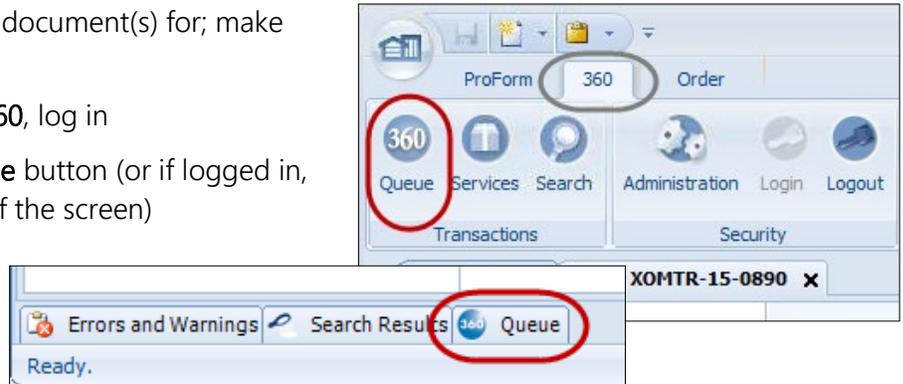


Sending Documents to the Lender

Follow these steps to submit document(s) to the Lender for an existing order.

1. Open the order you want to submit document(s) for; make sure all other orders are closed
2. If you are not already logged into 360, log in
3. From the 360 ribbon, click the **Queue** button (or if logged in, click the **Queue** tab at the bottom of the screen)

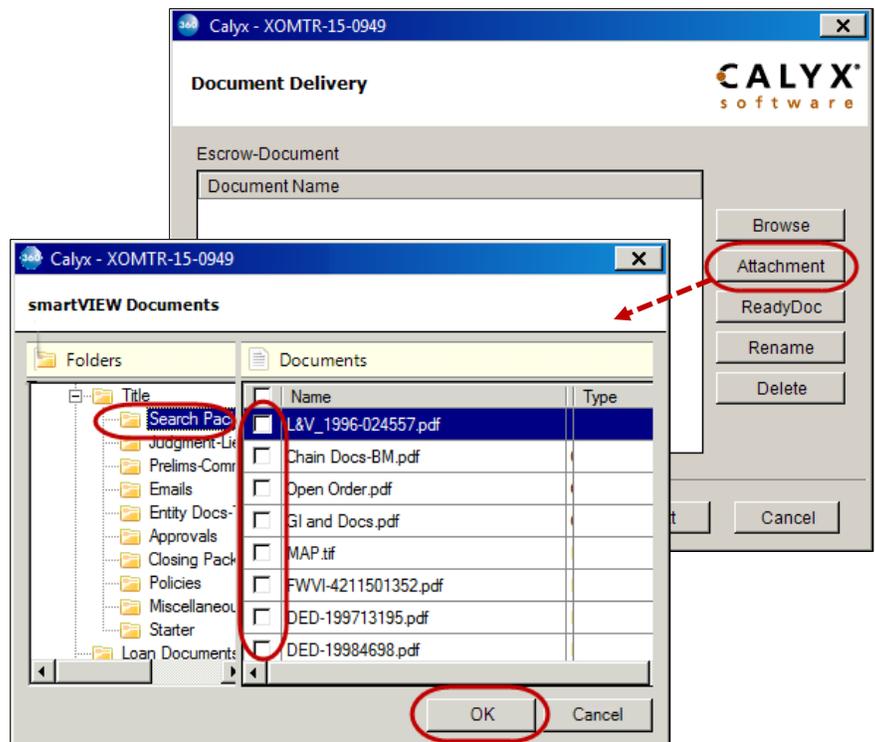


4. From the **Views** drop-down, select **Active Orders** to ensure you are working in the order you intend to submit the document
5. Click the **Next Steps** button



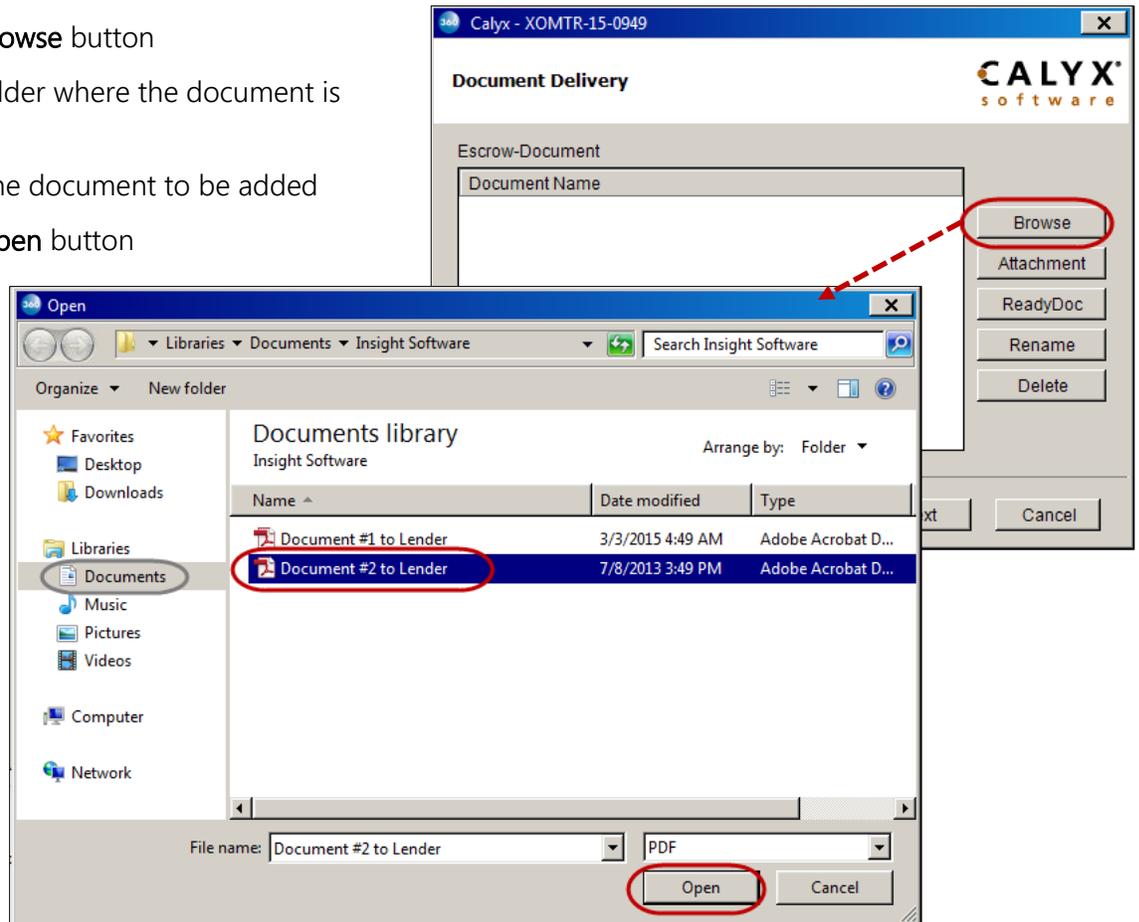
This opens the **Document Delivery** window. You can add document(s) from smartVIEW or from a local or network folder.

6. Select your document(s)
 -) located in smartVIEW,
 - a. Click the **Attachment** button
 - b. Click the folder where the document is stored
 - c. Check the applicable document check box(es)
 - d. Click the **OK** button

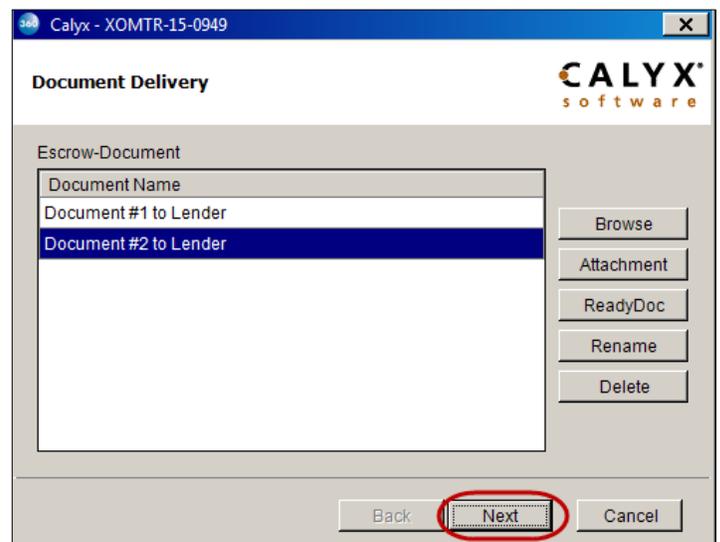


Sending Documents to the Lender

- › located in your Local or Network folder,
 - a. Click the **Browse** button
 - b. Click the folder where the document is stored
 - c. Highlight the document to be added
 - d. Click the **Open** button

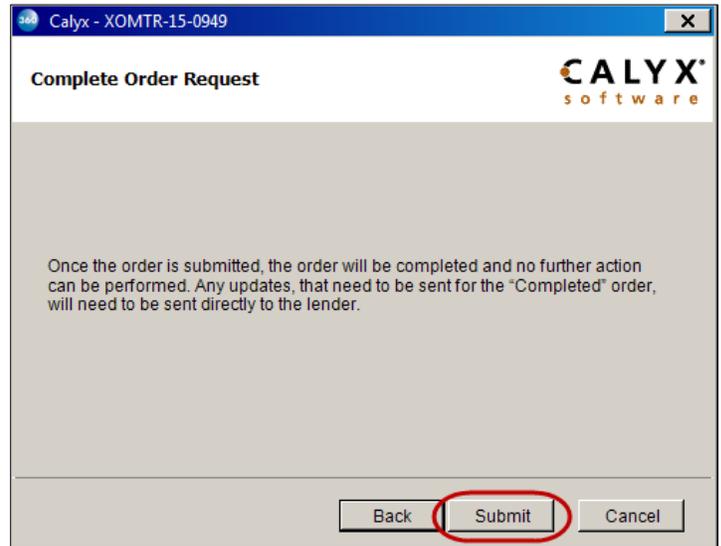


- 7. Once the document(s) is added, click the **Next** button

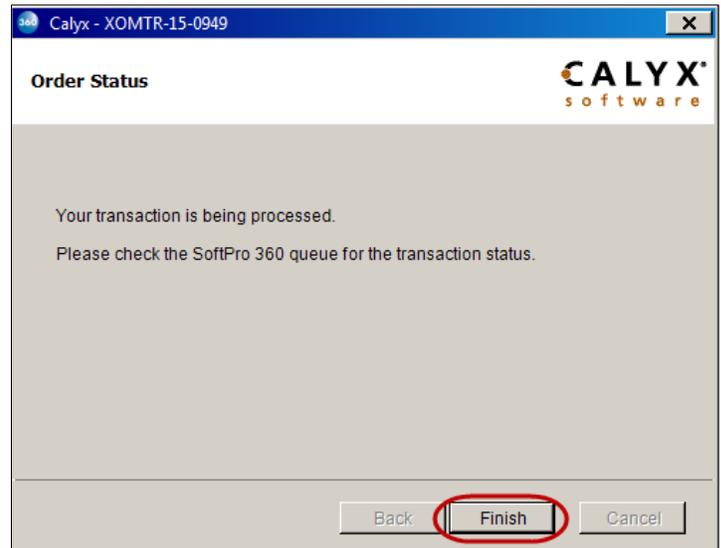


Sending Documents to the Lender

- At the Complete Order Request window, click Submit



- At the Order Status window, click Finish
- Save and Exit your order



The **Queue** now shows the Order as **Completed**. If further updates are required contact the Lender directly.

In our example, we submitted documents against the Escrow entry; the Title entry remains set to **In Progress** until documents are submitted.

Provider	Service	Status	Linked Order	Linked Profile	Description
Calyx	Point	Completed	XOMTR-15-0850	\\Default\T\...	j, j, 565 J Street livermore, CA, Title / Lender - ABC Mortgag
Calyx	Point	Completed	XOMTR-15-0857	\\Default\T\...	Jackson, Heather, 745 Happy Avenue Livermore, CA, Escro
Calyx	Point	Completed	XOMTR-15-0857	\\Default\T\...	Jackson, Heather, 745 Happy Avenue Livermore, CA, Title /
Calyx	Point	Completed	XOMTR-15-0949	Default\T\FL...	James, Nicole, 852 J. Street Cupertino, CA, Escrow
Calyx	Point	In Progress	XOMTR-15-0949	Default\T\FL...	James, Nicole, 852 J. Street Cupertino, CA, Title
Calyx	Point	Completed	XOMTR-15-0902	Default\T\FL...	Joe, John, 123 Any Way Livermore, CA, Title