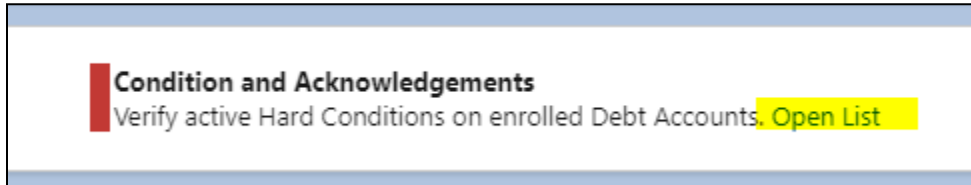


How-To Verify Conditions & Acknowledgements

1. Conditions & Acknowledgements tab will be red if any Hard Conditions are present – Click on **OPEN LIST**



2. Select the checkbox next to the account in which you are uploading the document to

| SELECT | NAME | DEBT ACCOUNT | VERIFIED BY DC | VERIFIED BY UW | UPLOADED BY DC | UPLOADED BY UW |
|-------------------------------------|---------------------|--------------|-------------------------------------|-------------------------------------|--------------------------|--------------------------|
| <input checked="" type="checkbox"/> | Statements Required | Capital One | <input type="checkbox"/> Unverified | <input type="checkbox"/> Unverified | <input type="checkbox"/> | <input type="checkbox"/> |

- 2a. If you are uploading a **SINGLE** document to satisfy multiple conditions (for example, a 224 or manual upload file) you may select ALL of the conditions that a credit report upload would satisfy

*Please be sure to add ALL creditors to the debt table prior to uploading the credit report & selecting conditions

Lead > 224 ERROR

Conditions and Acknowledgements

* Select a Document Type

--None--

7 items • Sorted by Status Type ASC

| SELECT | NAME | DEBT ACCOUNT | VERIFIED BY DC | VERIFIED BY UW | UPLOADED BY |
|-------------------------------------|-------------------------------|--------------|-------------------------------------|-------------------------------------|--------------------------|
| <input checked="" type="checkbox"/> | Client - Credit Pull Required | | <input type="checkbox"/> Unverified | <input type="checkbox"/> Unverified | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Statements Required | Capital One | <input type="checkbox"/> Unverified | <input type="checkbox"/> Unverified | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | Statements Required | JPMCB | <input type="checkbox"/> Unverified | <input type="checkbox"/> Unverified | <input type="checkbox"/> |

How-To Verify Conditions & Acknowledgements

- At the top of the page, a box will appear labeled “**Select a Document Type**” – Select the appropriate document type for which you are uploading

Lead > CORE SIMPLE

Conditions and Acknowledgements

*Select a Document Type

--None--

Complete this field.

- A box labeled “Upload Files” will appear, upload the document that satisfies the selected condition

*Select a Document Type

Credit Card Statement

Upload Files

Upload Files Or drop files

- Once the selected file is uploaded a green check mark will appear, select **Done**.

Unverified Unverified

Upload Files

PDF FDR-AFF Statistics Q2 2024.pdf 282 KB

1 of 1 file uploaded

Done

How-To Verify Conditions & Acknowledgements

6. The “Uploaded by DC” checkmark should now be green

| SELECT | NAME | DEBT ACCOUNT | VERIFIED BY DC | VERIFIED BY UW | UPLOADED BY DC | UPLOADED TO ECM | CONDITION RESPONSE |
|--------------------------|---------------------|--------------|-------------------------------------|-------------------------------------|-------------------------------------|--------------------------|--------------------|
| <input type="checkbox"/> | Statements Required | Capital One | <input type="checkbox"/> Unverified | <input type="checkbox"/> Unverified | <input checked="" type="checkbox"/> | <input type="checkbox"/> | |

7. You may now toggle the “Verified by DC” field

| SELECT | NAME | DEBT ACCOUNT | VERIFIED BY DC | VERIFIED BY UW | UPLOADED BY DC | UPLOADED TO ECM |
|--------------------------|---------------------|--------------|--|-------------------------------------|-------------------------------------|--------------------------|
| <input type="checkbox"/> | Statements Required | Capital One | <input checked="" type="checkbox"/> Verified | <input type="checkbox"/> Unverified | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

8. Complete this process for any additional hard conditions present and the pillar should now show green upon refresh

Condition and Acknowledgements

You're ready for Conversion! [Open List](#)