

How To Guide: Upload Documents Through EDocs

1. Click on the applicable loan from the **“Broker Pipeline”** to reveal additional options. Then click on **“open EDocs”**.

Portal Mode: **Broker** ▾

Broker Pipelines

- Loans
- Tasks
- Conditions
- QuickPricer

Loans | Conditions | Tasks

Search

Loan Number	Conditions	Tasks	Last Name	First Name
W2015030107	4 Conditions	2 Tasks	TESTCASE	DANNY

run pricing/request lock
view 1003
edit closing costs status
view pre-qual certificate
open EDocs
order services

2. On the next screen, click **“select Doc Type”**.

Upload Docs | Fax Docs | Document List

You may upload up to 6 PDFs at a time with a total upload size of 50MB.

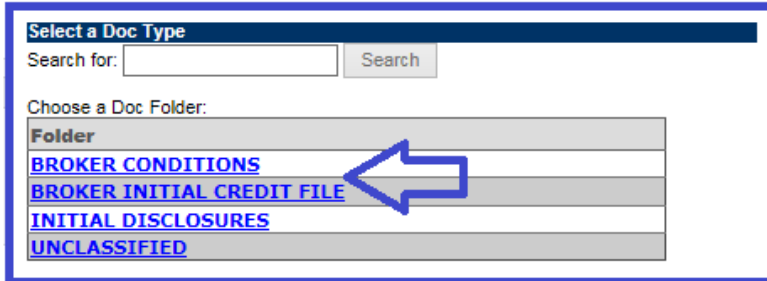
Doc Type / Application

No Doc Type Selected ❌
select Doc Type or scan barcodes

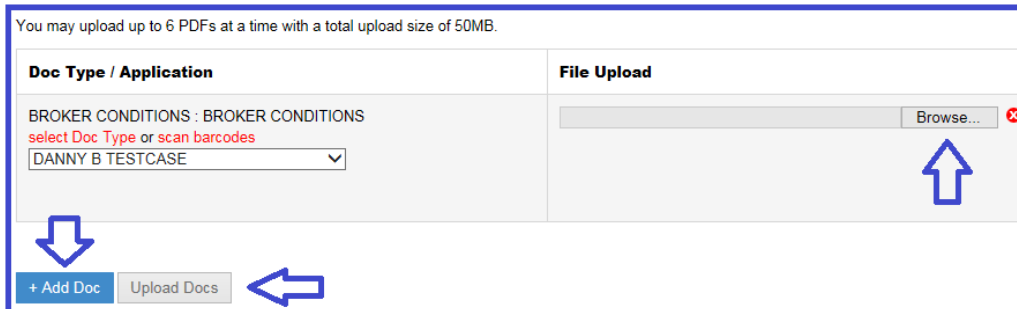
DANNY B TESTCASE ▾

+ Add Doc | Upload Docs

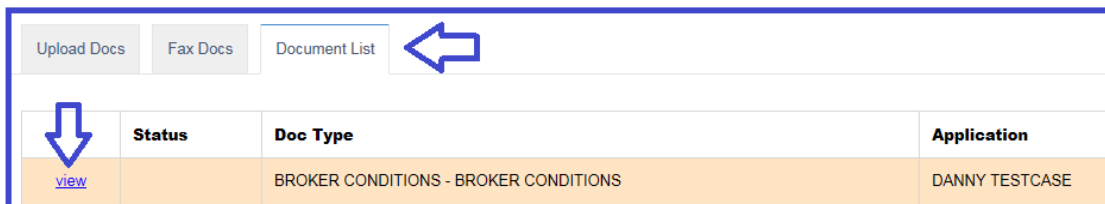
3. In the next window, select the type of document you are uploading.



4. After selecting the document type, click on **"Browse"** to search for the document on your computer. If you have multiple PDFs you can add up to 6 at a time by clicking the **" + Add Doc "** button. Once your documents are selected, click on **"Upload Docs"**.




5. To confirm that the document was uploaded, you can view the document in the **"Document List"** tab.



6. *****VERY IMPORTANT STEP*****


In order to communicate to Blustream that you have uploaded documents, it is critical that you resolve the appropriate **TASK**. From the Pipeline view, click on the **"Tasks"** link to open the existing outstanding tasks.

Loan Number	Conditions	Tasks	Last Name	First Name	Loan Amount	Loan Status	Status Date
W2015030107	4 Conditions	2 Tasks	TESTCASE	DANNY	\$375,000	Pre-Doc QC	3/28/2015




7. Click on the actual Task which pertains to the upload that was just completed.

Task	Subject	Status	Due Date	Follow-up Date	Last Updated	Assigned To	Owner
<input type="checkbox"/> MDG7HK	*****CLICK HERE***** PLEASE RESOLVE THIS TASK WHEN YOU ARE READY TO SUBMIT THE FILE TO Blustream	Active	04/16/2015		03/27/2015	Jason Ramirez	Processor



8. Select resolve.



Task MDG7HK		Edit	Assign	E-mail	Resolve	Back to Task List
Subject *****CLICK HERE***** PLEASE RESOLVE THIS TASK WHEN YOU ARE READY TO SUBMIT THE FILE TO Blustream						
Assigned to Jason Ramirez	Borrower DANNY B TESTCASE	Loan Number W2015030107		Task Owner Processor		
Status Active		Resolution Block Trigger Nexera Not Registered ?		Resolution Date Setter Document Check Date		
Due Date 4/16/2015		Task Permission General ?				
Follow-up Date						

9. Input any comments in the comment field and then choose ***“Resolve & Close”***
This step will notify Blustream that you have completed your document upload and are ready for us to review your file.

Subject *****CLICK HERE***** PLEASE RESOLVE THIS TASK WHEN YOU ARE READY TO SUBMIT THE FILE TO Blustream

Assigned to Jason Ramirez -> Processor **Borrower** DANNY B TESTCASE **Loan Number** W2015030107

Status Active -> Resolved **Task Owner** Processor [take ownership](#)

Due Date 4/16/2015 [calculate](#) **Task Permission** General ? [change](#)

Resolution Block Trigger Nexera Not Registered ? [clear](#) **Resolution Date** Document Check Date
Setter [clear](#)

Follow-up Date [calendar](#)

Comments Please review ASAP...

[Resolve & Close](#) [Resolve](#) [Cancel](#)