LOAN SERVICING SOFT Underwriting Conditions

This document will guide you through the process of setting up and using underwriting conditions in LOAN SERVICING SOFT.

For additional information and/or questions please feel free to contact our support group at support@loanservicingsoft.com or 1-800-993-1839 x2.

LOAN SERVICING SOFT comes with standard Underwriting Conditions that you edit, add, or delete to your needs. You can create your own master template and then adjust accordingly for each loan.

Master Template

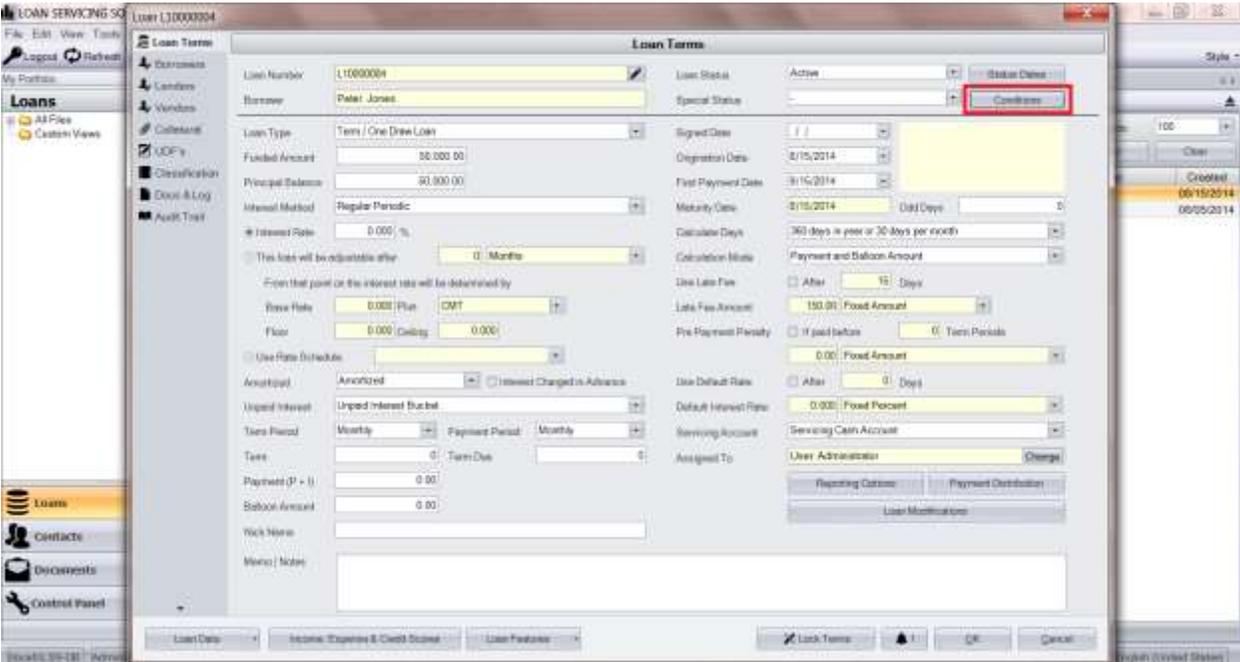The template is found in Control Panel -> Configuration Options -> Underwriting Conditions.

From this window you can:

- Add or delete conditions
- Edit the existing conditions
- Change the condition's default Status, Category, Date Requested, and Date Completed/Received
- Rearrange the conditions by moving them up or down as desired

Once you have set the master template it will appear in every loan. You can then customize the conditions for individual loans.
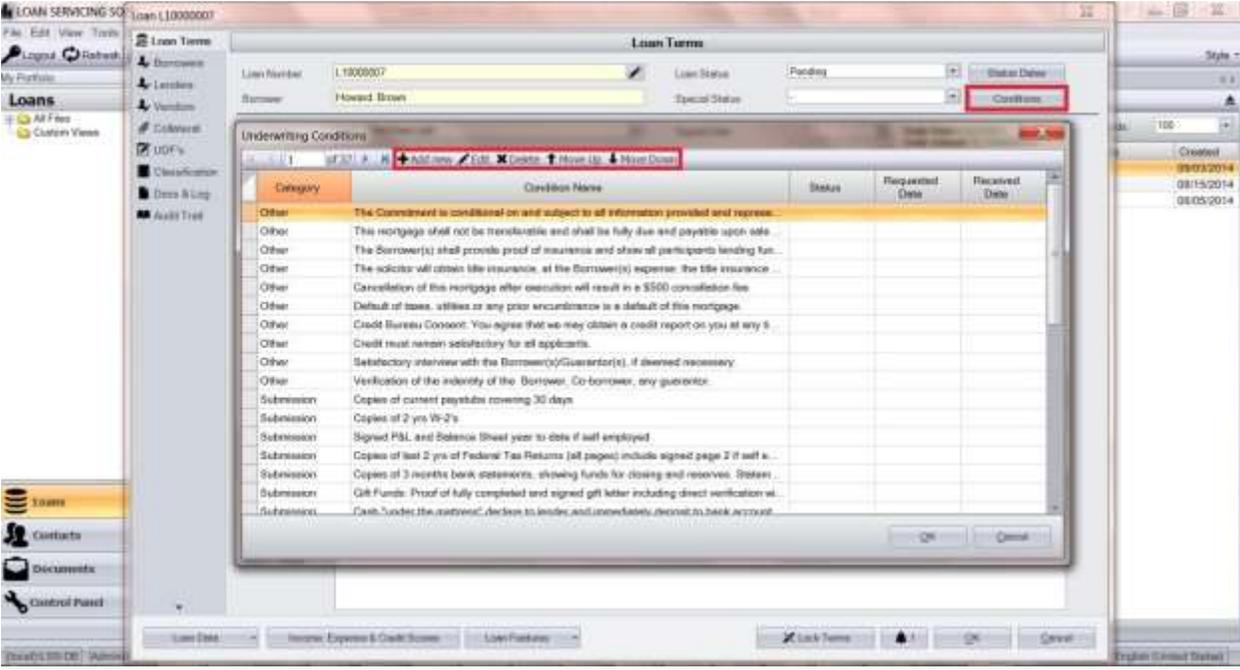
Underwriting Conditions per Loan

To add, delete, or modify underwriting conditions for a specific loan, open the loan object and click the Conditions button.

In the Underwriting Conditions window you can:

- Add or delete conditions
- Edit the existing conditions
- Change the condition's Status, Category, Date Requested, and Date Completed/Received
- Rearrange the conditions by moving them up or down as desired

Printing a Condition Sheet

The underwriting conditions report is located in Documents -> Reports -> Application Pipeline -> Underwriting Conditions.

Select a Loan and Run the report, then you can choose to print or export the report.