

DEAL MARKETING AUTOMATION

- 1 MEET OR BEAT 
- 2 CHECKLIST (NEW CLIENT) 
- 3 APP-IN - PENDING DOCS 
- 4 DOCS IN - STRUCTURING 
- 5 ORDER VOE 
- 6 PRE-APPROVAL SENT 
- 7 HOME HUNTING 
- 8 E-CONSENT 
- 9 CONTRACT ACCEPTED  
- 10 TO BE DISCLOSED  
- 11 OPS HANDOFF - PENDING SIGNATURE
- 12 PROCESSING/UW SUBMISSION 
- 13 APPRAISAL ORDERED  
- 14 SUBMITTED TO UW 
- 15 APPRAISAL IN (VALUE GOOD) 
- 16 APPRAISAL IN (VALUE SHORT) 
- 17 APPRAISAL IN (VALUE GOOD SUBJECT TO) 
- 18 APPRAISAL IN (VALUE SHORT SUBJECT TO) 
- 19 CLOSING CONDITIONS (FINAL) 
- 20 FAST TRACK CD 
- 21 CLEAR TO CLOSE 
- 22 CLOSING/FUNDING  
- 23 CLOSING/FUNDING (REFI)  