



**CONNEXIONS**



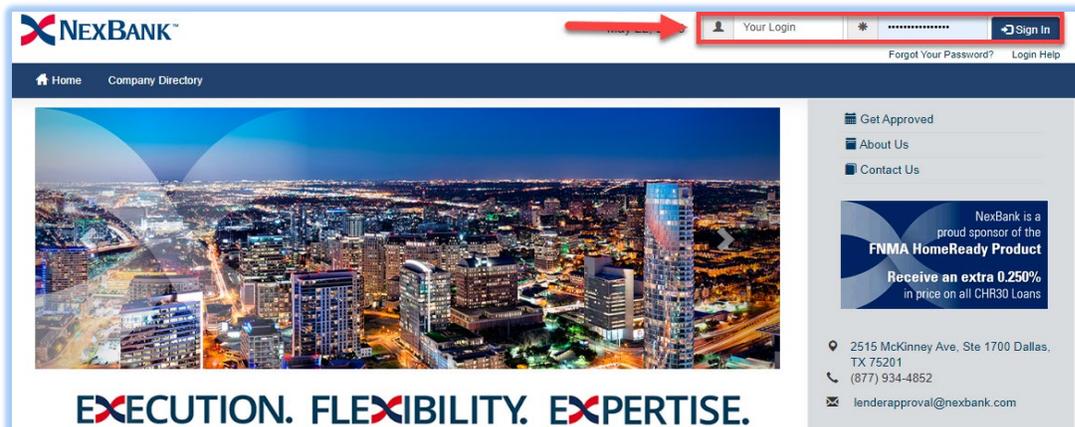
B2B Portal  
Broker User Guide

September 2021

## Welcome to Connexions!

NEXBANK will be using the Connexions platform to procure their Appraisals. Follow the steps in this guide to help place your Appraisal Orders.

### Logging into the B2B Portal



1. Login to the B2B Portal by going to <https://www.test.pclender.com/>
2. Enter your User ID /Password and click on Sign In.

### Upload a Loan



Upon signing into the B2B portal you will see the option to 'Upload A Loan'. Once you Click 'Upload A Loan' you will be prompted to select the AUS, Channel, Loan Program and upload your **DU File**.

## Disclosure Package/Create Loan File

**Workflow Option 2**

Do you want NexBank to Disclose the initial Disclosure Package?: --Select--

[Back](#)
[Submit](#)

After you submit who will Disclose the Disclosing Package, the DU file will load into the portal and create the Loan file and assign a Loan Number

**Loan Number 690002076, John Sample**
Loan Number
Floating

✓ Registered 05/21/2020	Setup Received	Submitted to UW	Approved with Conditions	Early CD Eligible	Clear to Close	Funded
----------------------------	----------------	-----------------	--------------------------	-------------------	----------------	--------

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

←

[Loan Details](#)
[Connexions Appraisal](#)
[Anti-Steering Data](#)
[Intent to Proceed](#)
[Pricing/Lock](#)
[Conditions](#)
[Submit Loa](#)
→

### Loan Details

**Borrower**

Name:	John Sample	Citizenship:	U.S. Citizen
Occupancy:	Owner	Marital Status:	Married

**Subject Property**

Street:	15 Sandstone Ct	Property Type:	Single Family Dwelling
City, St Zip:	San Rafael CA 94901	Units:	1

**Loan Information**

Loan Program:	Conf Fixed 30	Rate:	5.125%
Loan Purpose:	Purchase	Lock Status:	Floating
Loan Amount:	\$300,000.00	Ratios:	14.60% / 35.88%
Base Loan:	\$300,000.00	Haz Impounds:	Yes
LTV/CLTV:	75.00% / 75.00%	Tax Impounds:	Yes
MI Coverage:	0.00%	Agency Case Number:	

Merge a Loan
Cancel Loan

## How to Request Appraisal Order via **CONNEXIONS**

**Loan Number 690002076, John Sample** Floating

✓ Registered 05/21/2020   Setup Received   Submitted to UW   Approved with Conditions   Early CD Eligible   Clear to Close   Funded

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then retrieve your AUS Findings or Credit into the loan! Then refresh to see your next step toward closing!

← Loan Details **Connexions Appraisal** Anti-Steering Data Intent to Proceed Pricing/Lock Conditions Submit Loa →

### Loan Details

Borrower	
Name:	John Sample
Citizenship:	U.S. Citizen

Click on the **“Connexions Appraisal”** tab from the loan page to request your Residential Appraisal. Information from the loan file will prepopulate into the Connexions Order Form. Verify the information is correct, then proceed to select your Product, Preferred AMC and update any relevant Borrower information (i.e. Contact #'s/ Email)

Connexions Appraisal

Request Residential Appraisal   Payment Information

### Request Residential Appraisal

Nexbank

#### Property Info

*Please provide the Subject Property Address to be appraised.*

Street Num \* 15  
Street Name \* Sandstone Ct  
Unit Number  
City \* San Rafael  
State \* CA  
Zip \* 94901  
Purchase Price 400000  
(Please enter purchase price on all purchase orders.)

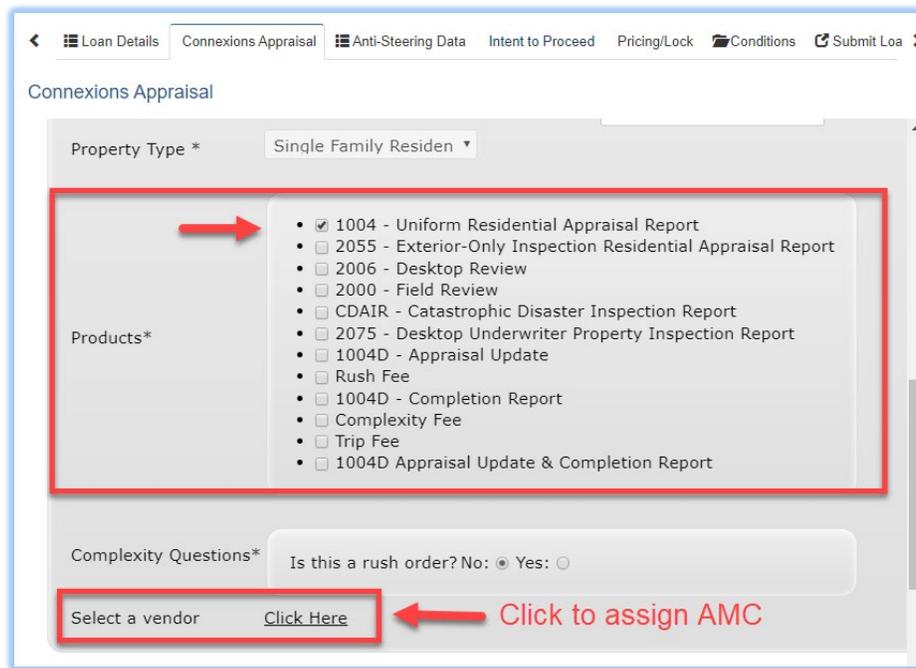
#### Appraisal Information

*Accurate appraisal details will help ensure an accurate report the first time around.*

Payment Type \* Credit Card  
Transaction Type \* Purchase

## Selecting Products

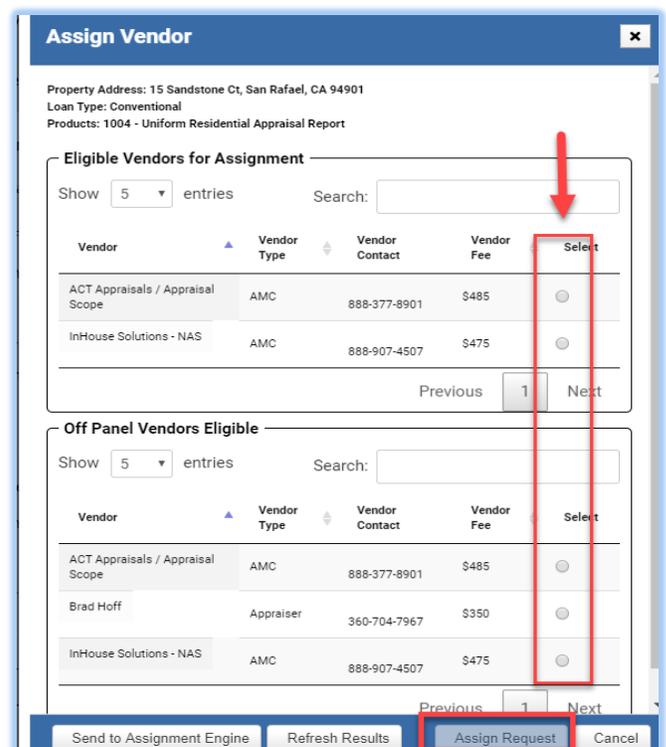
Scroll down on the Order Form and select the desired Product. A Product must be selected in order to display the AMC’s Quote to complete the assignment.



## Select your AMC

When you click on “Select a vendor” a screen with a list of NEXBANK AMC’s will appear along with their respective fee.

In order to select your preferred AMC, click on the radio button near the far right followed by ‘Assign Request’ at the bottom of the page



## Update Borrower's Information

Buyer/Borrower Info

*Provide accurate borrower information, as this information will be included on your report. For purchases, please make sure to provide accurate information.*

Borrower First Name \* John      Last Name \* Sample  
 Home Number 4165555556      Home Number Ext.   
 Cell/Other Number      Cell/Other Number Ext.   
 Email Address noemail@noemail.com

I certify I have the Borrower's Intent to Proceed \*

Co-Borrower First Name Marys      Last Name Sample  
 Home Number 7722212809      Home Number Ext.   
 Cell/Other Number 4165555556      Cell/Other Number Ext.   
 Email Address test@test.com

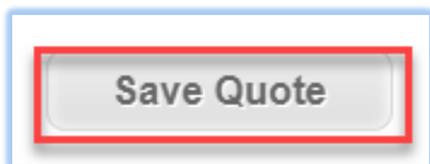
Borrower's Information will prepopulate from the DU File. If there are any changes required, you can update it prior to submitting your appraisal for a *Quote*.

*Only certain fields are editable or selectable / Mandatory fields must be filled*

## Submitting a QUOTE

Once you have selected your Product, AMC and updated any information, click on the **SAVE QUOTE** button at the bottom of the Order Form to create your order and receive a Connexions Order ID.

The Order will remain in 'Quote' status until the **Intent to Proceed** date.



Appraisal ID: 8610 ← Order ID

Source: PC Lender  
 Location: Nexbank

**Connexions Order Details Page**

Appraisal Information

Property Type: Single Family Residence      Transaction Type: Purchase  
 Loan Type: Conventional      Case Number:   
 Occupancy Type: Primary Residence      Purchase Price: 400000  
 Loan Number: 69002033      Lender Target Delivery Date:   
 Appraised Amount:      Vendor Estimated Delivery Date:   
 Products

Schedule

Appraisal Appointment: No Appointment Scheduled

Status History

Status	Date
Quote	05-21-2020 05:01 pm

↑ Status

## Intent to Proceed

The Appraisal will not be sent to the assigned AMC until the **Intent to Proceed** Date has been applied. Click on the 'Intent to Proceed' tab from the loan page to enter your Intent to Proceed date.

Loan Number 690002033, John Sample Floating

✓ Registered 05/21/2020
Setup Received
Submitted to UW
Approved with Conditions
Early CD Eligible
Clear to Close
Funded

Please price your loan and "Save to LOS" or Lock it in in order to establish your loan program and then receive your AUS Findings or Credit into the loan! Then refresh to see your next step towards closing!

←
☰ Loan Details
Connexions Appraisal
☰ Anti-Steering Data
Intent to Proceed
Pricing/Lock
📁 Conditions
📄 Submit Loa >

Connexions Appraisal



🔍 Change Items
🔄

	Current Value	Requested Value
Borrower Intent to Proceed Date	5/28/2020	<input type="text" value="MM/DD/YYYY"/>
How was the intent given?	Oral	<input type="text" value=""/>
Date of Loan Estimate where Intent to Proceed Given?	5/28/2020	<input type="text" value="MM/DD/YYYY"/>
Intent was given by:	Sally	<input type="text" value=""/>
Intent to proceed was given to	Jeff	<input type="text" value=""/>

Submit Request
Fill out details on the Intent to Proceed and Submit Request

*After applying the **Intent to Proceed**, that will be updated in the NEXBANK LOS. When you log back into the B2B Portal, and return to the Connexions Appraisal tab, you will be able to Request Appraisal*

## Requesting Appraisal

When the Intent to Proceed date has arrived you can go back into the B2B portal and search for the Loan that was sent for Quote. Click on the “Connexions Appraisal” tab and scroll to the bottom and to Request the Appraisal.

Q Loan Search

Enter Loan Number [Q]

Enter Last Name [Q]



**Request Appraisal**

Scroll to the bottom of Order Form

**SEARCH LOAN #**

## Pay for Appraisal

**Payment Information**

Thank you! We have received your appraisal request. Your order number is **8612**.

**NOTE:** We require payment for the appraisal at the time of order before proceeding with processing of your appraisal order.

**The fee should not exceed \$475** (subject to change based on additional information and circumstances)

**Credit Card Information**

Credit Card Number: [input]

Credit Card Type: [dropdown: --Credit Card--]

Credit Card Expiration (MM/YYYY): [dropdown: --Month--] [dropdown: --Year--]

**Is the borrower paying for this appraisal?:**  
Yes:  No:

By clicking on this box, I certify that I am the card holder, or I have written authorization to process this Credit Card Payment on behalf of the card holder. Further, I agree to and authorize the charge for the appraisal fee(s) listed above.

**Billing Information**

Check to use property address

Name: [input]

Billing Address 1: [input]

Billing Address 2: [input]

Billing City: [input]

Billing State: [dropdown: --State--]

Enter Credit Card Information to pay for the Appraisal

Once the order has been paid, the order will be directed to the assigned AMC for Acceptance

**For any additional questions/inquiries, please contact the Connexions support team at:**

*1-844-259-8599 (M-F 8-8 Eastern Time)*

*clientservices@getcnx.com*