

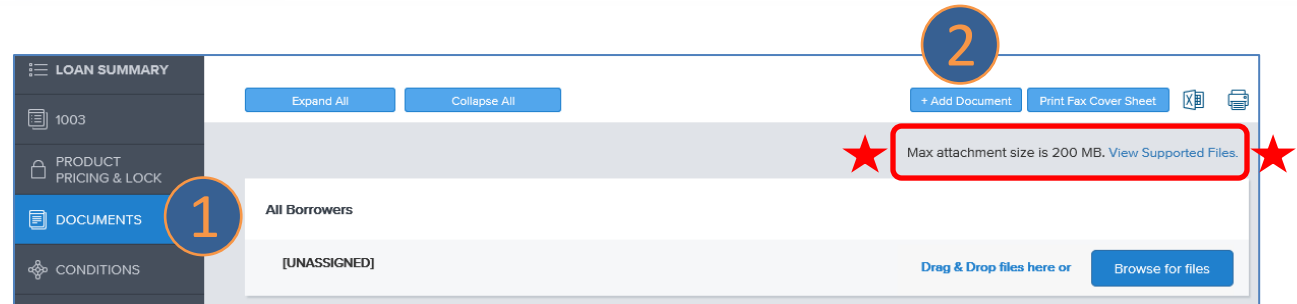


Adding Documents

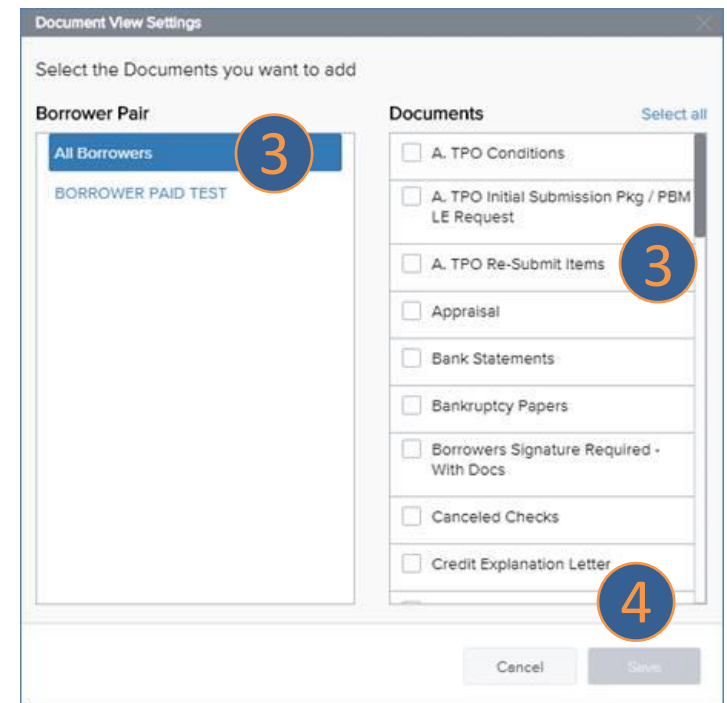
Rev. 8/21/2018

Adding Documents:

1. On the menu on the left, click **Documents**.
2. Click the **Add Document** button.
3. On the **Document View Settings** dialogue box, select a borrower pair and then select a document from the **Documents** list.
4. Click **Save**.



- For **submissions**, all documents go to **A. TPO Initial Submission Pkg/PBM LE Request**.
- For **re-submittal**, all documents go to **A. TPO Re – Submit Items**.
- For **conditions**, all documents go to **A. TPO Conditions**.



Special NOTE: Documents uploaded will be automatically indexed through the use of document recognition technologies. Documents which are unable to be automatically indexed will be temporarily placed in an unknown placeholder, which will need to be manually renamed by our internal staff.

★ **Max attachment size is 200 MB supported file types are PDF, DOC, DOCX, TXT, TIF, JPG, JPEG, EMF, ZIP.** ★

Adding Documents:

1. Click the **Browse for Files** button to select a file from your computer to attach to the document entry, or you can also use the drag and drop function. The document is now in the Documents.

The screenshot displays the 'DOCUMENTS' section of the Wholesale TPO Connect interface. On the left is a dark sidebar with navigation options: LOAN SUMMARY, 1003, PRODUCT PRICING & LOCK, DOCUMENTS (highlighted), CONDITIONS, FEES, DISCLOSURE, TRACKING, and LOAN ACTIONS (with sub-options: Import Additional Data, Order Credit, Order DU, Order LPA, Disclosures, Submit Loan, Re-Submit Loan, Change of Circumstance). The main content area has buttons for 'Expand All', 'Collapse All', '+ Add Document', and 'Print Fax Cover Sheet'. A note states 'Max attachment size is 200 MB. View Supported Files.' Below this, there are sections for 'All Borrowers' (with '[UNASSIGNED]' and a 'Browse for files' button) and 'Test Brian' (with 'PPE REPORT' and 'TPO SUBMISSION FORM OR PACKAGE' entries, each with a 'Comments' icon and a 'Browse for files' button). A file '92504.pdf' (43 k, 07/17/2018 12:56 PM, tpolo351 Tester) is listed at the bottom. Two blue circles with the number '1' are overlaid on the 'Browse for files' buttons for the 'PPE REPORT' and 'TPO SUBMISSION FORM OR PACKAGE' entries.

- If the documents uploaded to **A. TPO Initial Submission Package** you **MUST** go to Submit Loan under Loan Actions and click on the **Submit Loan** button to notify PBM.
- If documents uploaded to **A. TPO Re – Submit Items** you **MUST** go to Re-submit Loan under Loan Actions and click on the **Re-submit Loan** button to notify PBM.
- If documents uploaded to **A. TPO Conditions** you **MUST** go to Re-submit Loan under Loan Actions and click on the **Re-submit Loan** button to notify PBM.