

Step 1: Log into TPO Connect using the site address below. Your username will always be your email address.

TPO Connect Link

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Remember Me				
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Step 2: Click **PIPELINE** from the menu bar at the top. Search for your loan by last name or loan number by using the dropdown in **Find Loan**.

PIPELINE	ADD NEW LOAN	SCENARIOS	FCM knowledge center \sim	NEW USER REQU	JEST ~ RES	OURCES V DOCUMENTS	Advanced Filt	er Archive [
	Borrower Name	Loan #	Lender Case #	Alternate Loan #	Property Add	Loan # Lender Case #	urrent TPO onnect Status	Lock & Request Status	F
	🖂 Ackbar, Admiral	5100081539	5100081539		275 Robert Ro	Borrower Name Alternate Loan #	egistered	Expired	C
	🖂 🛛 America, Andy	100180703499	7		4321 Cul de Si	ac St SMYRNA TN 37167		🧯 Not Locked	

Click on the loan to open

PIPELINE	ADD NEW LOAN	SCENARIOS	FCM KNOWLEDGE CENTER $ imes $	NEW USER REQUES	it ~ resources ~ docu	MENTS	
				Find Loan	customer	Advanced Filter Clear Filte	ers /
	Borrower Name	Loan #	Lender Case #	Alternate Loan #	Property Address	Current TPO Connect Status	Lock Statu
	Customer JR, Ken I	N 5100113822	DI-C01_v3.4		10655 Birch St Burbank CA 91502-1234	Registered	<u></u>

Step 3: Once you open the loan from the pipeline, the screen below will appear. Click on **DOCUMENTS** on the left side of the screen.

TPO CONTACTS WELCOME	PIPELINE ADD NEV	VILOAN SCENARIOS	FCM KNOWLEDGE CENTER ~	NEW USER REQUEST ~	RESOURCES ~	DOCUMENTS	
Ken Customer 10655 Birch St, Burbank, CA, 91502-12 01DC Sample	Collatera 34	al Trac Lender Case # Loan #: Alternate Loan	t: DI-C01_v 51001138 VA Loan Sum	\$300,000.00 Loan Type: 750 Loan Purpo	: Conventional ose: Purchase	Interest Rate: Loan To Value	4.250% 88.24% / 88.24% C 1st
	Ken Cust	omer	Pendin	a Purchase Review	,	Key Dates	
	\$300,000.00		. chain			Registered	03/10/2021
		Document Tyr	Purchase Con	ditions		Submitted for Review	
	Conventional	FullDocume	entation Open		0	Purchase Suspended	
CONDITIONS	Lien Position FirstLien	Loan Purpose Purchase				Purchased Approval	
S PURCHASE ADVICE	Amortization Typ	e Purpose of Re	•Fi			Clear to Purchase	
LOAN ACTIONS	Fixed Rate Amortization Ter 360	- m	10655 H 91502-1	3irch St, Burbank, 0 1234	CA	Purchase Date	
Import Additional Data			Primary 1	Unit Detached		Withdrawn Date	
Submit for Review			Purchase Prio	e Estimated Va	lue		



Submitting a Loan for Underwriting- updated 4.7.21



Step 4: Upload your pdf file to the ***CORRESPONDENT UW SUBMISSION PACKAGE** placeholder. Drag the pdf file from your desktop and release over **Drag & Drop files here** or **click to browse** and select the pdf file you saved. *Be sure to include the pre-closing underwriting submission checklist.*

Ken Customer 10655 Birch St, Burbank, CA, 91502-1234 01DC Sample	Collateral Trac	Lender Case #: Loan #: Alternate Loan	DI-C01_v 51001149	Total Loan Am VA Loan Sum	\$300,000.00 760	Loan Type: Loan Purpose:	Conventional Purchase	Interest Rate: Loan To Value	3.500% 88.24% / 88.24%	Registered C 1st	í 🗹
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PURCHASE CONDITIONS	[UNASSIGNED]							Drag &	Drop files here or	Browse for	files
(\$) PURCHASE ADVICE	Ken Customer										
LOAN ACTIONS	*CORRESPONDENT CLOS	ED LOAN PACKAGE					Comn	nents Drag &	Drop files here or	Browse for	files
Import Additional Data Submit for Review	*CORRESPONDENT CONI	DITIONS TO BE REVIEW	VED				Comn	nents Drag &	Drop files here or	Browse for	files
	*CORRESPONDENT PURC	HASE SUSPENSE COM	DITION SHEET				Comn	nents Drag &	Drop files here or	Browse for	files
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	*CORRESPONDENT UW S	UBMISSION PACKAGE				-		Drag &	Drop files here or	Browse for	files

Once your pdf is imported, click **Close and Refresh**.

Ken Customer				
*CORRESPONDENT CLOSED LOAN PACKAGE		Comments	Drag & Drop files here or	Browse for files
*CORRESPONDENT CONDITIONS TO BE REVIEWED		Comments	Drag & Drop files here or	Browse for files
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Step 5: The " " " next to the placeholder indicates there are documents in a placeholder. Click the arrow to open the folder to see your successfully imported documents.

	Max attachment size is 200 MB. View Supported Files.	Expand All Collapse All Print F
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& PURCHASE CONDITIONS	[UNASSIGNED]	Drag & Drop files her
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Step 6: Now that your Underwriting Submission package has been imported, click **Submit for Review** under the loan actions on the left side of your screen. A window will appear to confirm you are ready to submit, click **Continue**. Once you click Continue, the following Green Banner will appear inidicating your Loan was submitted Successfully.

Kent Customer 10655 Birch Street, Burbank, CA, 91502 01DC Sample	Collateral Trac Lender Case F: 50016133 Total Loan Am 5300,000,00 Loan Type: Convention Alorn F: 50016133 VA Loan Sum 760 Loan Purpose: Panthase Alorn Purpose: Panthase Alorn	Int conserve materials
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PURCHASE CONDITIONS	[UNASSIGNED]	
(\$) PURCHASE ADVICE		C PRODUCT PRICING & Submission Overview
	Kent Customer	DOCUMENTS Application Date Submission Status Initial Submit
LOAN ACTIONS	*CORRESPONDENT CLOSED LOAN PACKAGE	OLOS2019 Not Submitted OLOS2019
Import Additional Data Submit for Review	*CORRESPONDENT CONDITIONS TO BE REVIEWED	PURCHASE ADVICE Borrower Information Solution Solution Solution
	*CORRESPONDENT UNDERWRITING APPROVAL	LOAN ACTIONS
		Import Additional Data Borrower Co-Borrow
	TEST UNDERWRITING SUBMISSION PACKAGE.pdf 17 KB 04/13/2021 8:57 PM DC User	Submit for Review Borrower First Name Ken Co



Your loan was submitted Successfully.





Step 7: Once the loan has been underwritten, the conditions will be published under the ***CORRESPONDENT UNDERWRITING APPROVAL** placeholder, located in the documents tab. A notification email will be sent to advise the conditional approval has been published.

To upload documents for review, click **DOCUMENTS** and upload your pdf file to the ***CORRESPONDENT CONDITIONS TO BE REVIEWED** placeholder. Drag the pdf file from your desktop and release over **Drag & Drop file here** or **click to browse** and select the pdf file you saved.

Once your pdf is imported, click Close and Refresh.

Ken Customer 10655 Birch St, Burbank, CA, 91502-1234 01DC Sample	Collateral Trac Lender Case #: Di-Coll.y Total Loan Am \$300,000.00 Loan Type: Loan #: \$1001149 VA Loan Sum 760 Loan Purpose: Alternate Loan.	Conventional Purchase
E LOAN SUMMARY		
URLA		
	Max attachment size is 200 MB. View Supported Files.	Exp
	All Borrowers	
& PURCHASE CONDITIONS	[UNASSIGNED]	
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