

TPO Loan Registration Steps



1 Pipeline - Login to your system to view your pipeline

Loans Pipeline Active

1
LE Issued
LE Out

1
Rate Locked
Rate Locked

19
Loans Registered
All Loans

6
Outstanding PTD Conditions

29
All Loans
All Loans

+ Start New Loan
(Click or Drop file to Start)

Pricing

<input type="checkbox"/>	Loan Numl	Conditio	Borrower	Subject Property	Loan Status	Lock Exp Date	Loan Amou	Note Rat	Loan Type	Loan Purpos
<input type="checkbox"/>	53112	0	Ken N Customer	10655 Birch St	PreQual		300,000...	5.490	Conventio...	Purchase
<input type="checkbox"/>	53111	1	Ken N Customer	10655 Birch St	Submit to Pr...		300,000...	4.250	Conventio...	Purchase
<input type="checkbox"/>	53109	0	Bobby Ewing		PreQual		400,000...	6.000	Conventio...	Purchase
<input type="checkbox"/>	53108	0	Sam Austin		In Processing		400,000...	6.000	Conventio...	Purchase
<input type="checkbox"/>	53107	0	Richard Brown	4657 Margo Court	Submit to Pr...		400,000...	6.000	Conventio...	Purchase
<input type="checkbox"/>	53105	0	test est		PreQual		0.00	0.000		
<input type="checkbox"/>	53104	0	Bobby Borrower	1628 University	In Processing		400,000...	5.990	Conventio...	Purchase
<input type="checkbox"/>	2507030...	0	Bobby Ewing		Submit to Un...		400,000...	6.000	Conventio...	Purchase
<input type="checkbox"/>	2507030...	0	Piper Borrower	333 Arborview Dr	Clear to Close		400,000...	6.000	Conventio...	Purchase
<input type="checkbox"/>	2507030...	0	Ken N Customer	10655 Birch St	PreQual		250,000...	7.311	Conventio...	Purchase
<input type="checkbox"/>	2507030...	0	Sung N TPOTest	10655 Birch St	Clear to Close		250,000...	7.311	Conventio...	Purchase
<input type="checkbox"/>	2507021...	0	JOHN PREPARER	1628 University Dr	In Closing		240,000...	7.000	Conventio...	Purchase
<input type="checkbox"/>	2506170...	0	Loren Winston		PreQual		400,000...	6.000	Conventio...	Purchase
<input type="checkbox"/>	2505230...	0	Tammy Edwin		PreQual		400,000...	6.000	Conventio...	Purchase
<input type="checkbox"/>	53018	0			PreQual		0.00	0.000		
<input type="checkbox"/>	2505231...	0	Tracy Elders	4657 Margo Ct	In Processing		450,000...	0.000	Conventio...	Purchase
<input type="checkbox"/>	2505190...	0	Melissa Adams	9600 Bull Creek Dr	Submit to Pr...		400,000...	6.000	Conventio...	Purchase

2 Pipeline - Select New Loan to start a new loan or Import to import a new file

Dashboard statistics:

- 1 LE Issued / LE Out
- 1 Rate Locked / Rate Locked
- 19 Loans Registered / All Loans
- 6 Outstanding PTD Conditions
- 29 All Loans / All Loans

Buttons: + Start New Loan (Click or Drop file to Start), Pricing

Loan Num	Conditio	Borrower	Subject Property	Loan Status	Lock Exp Date	Loan Amou	Note Rat	Loan Type	Loan Purpos
53112	0	Ken N Customer	10655 Birch St	PreQual		300,000...	5.490	Conventio...	Purchase
53111	1	Ken N Customer	10655 Birch St	Submit to Pr...		300,000...	4.250	Conventio...	Purchase
53109	0	Bobby Ewing		PreQual		400,000...	6.000	Conventio...	Purchase
53108	0	Sam Austin		In Processing		400,000...	6.000	Conventio...	Purchase
53107	0	Richard Brown	4657 Margo Court	Submit to Pr...		400,000...	6.000	Conventio...	Purchase
53105	0	test est		PreQual		0.00	0.000		
53104	0	Bobby Borrower	1628 University	In Processing		400,000...	5.990	Conventio...	Purchase
2507030...	0	Bobby Ewing		Submit to Un...		400,000...	6.000	Conventio...	Purchase
2507030...	0	Piper Borrower	333 Arbonview Dr	Clear to Close		400,000...	6.000	Conventio...	Purchase
2507030...	0	Ken N Customer	10655 Birch St	PreQual		250,000...	7.311	Conventio...	Purchase
2507030...	0	Sung N TPOTest	10655 Birch St	Clear to Close		250,000...	7.311	Conventio...	Purchase
2507021...	0	JOHN PREPARER	1628 University Dr	In Closing		240,000...	7.000	Conventio...	Purchase
2506170...	0	Loren Winston		PreQual		400,000...	6.000	Conventio...	Purchase
2505230...	0	Tammy Edwin		PreQual		400,000...	6.000	Conventio...	Purchase
53018	0			PreQual		0.00	0.000		
2505231...	0	Tracy Elders	4657 Margo Ct	In Processing		450,000...	0.000	Conventio...	Purchase
2505190...	0	Melissa Adams	9600 Bull Creek Dr	Submit to Pr...		400,000...	6.000	Conventio...	Purchase
2505140...	0	Bobby Day	4657 Margo Ct	In Underwriti...		240,000...	7.000	Conventio...	Purchase

Buttons: New Loan, Import

3 Pipeline - Drag and drop files in the "Start New Loan" section for easy uploading.

Dashboard statistics:

- 1 LE Issued / LE Out
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- 29 All Loans / All Loans

Buttons: + Start New Loan (Click or Drop file to Start), Pricing

Loan Num	Conditio	Borrower	Subject Property	Loan Status	Lock Exp Date	Loan Amou	Note Rat	Loan Type	Loan Purpos
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53109	0	Bobby Ewing		PreQual		400,000...	6.000	Conventio...	Purchase
53108	0	Sam Austin		In Processing		400,000...	6.000	Conventio...	Purchase
53107	0	Richard Brown	4657 Margo Court	Submit to Pr...		400,000...	6.000	Conventio...	Purchase
53105	0	test est		PreQual		0.00	0.000		
53104	0	Bobby Borrower	1628 University	In Processing		400,000...	5.990	Conventio...	Purchase
2507030...	0	Bobby Ewing		Submit to Un...		400,000...	6.000	Conventio...	Purchase
2507030...	0	Piper Borrower	333 Arbonview Dr	Clear to Close		400,000...	6.000	Conventio...	Purchase
2507030...	0	Ken N Customer	10655 Birch St	PreQual		250,000...	7.311	Conventio...	Purchase
2507030...	0	Sung N TPOTest	10655 Birch St	Clear to Close		250,000...	7.311	Conventio...	Purchase
2507021...	0	JOHN PREPARER	1628 University Dr	In Closing		240,000...	7.000	Conventio...	Purchase
2506170...	0	Loren Winston		PreQual		400,000...	6.000	Conventio...	Purchase
2505230...	0	Tammy Edwin		PreQual		400,000...	6.000	Conventio...	Purchase
53018	0			PreQual		0.00	0.000		
2505231...	0	Tracy Elders	4657 Margo Ct	In Processing		450,000...	0.000	Conventio...	Purchase
2505190...	0	Melissa Adams	9600 Bull Creek Dr	Submit to Pr...		400,000...	6.000	Conventio...	Purchase
2505140...	0	Bobby Day	4657 Margo Ct	In Underwriti...		240,000...	7.000	Conventio...	Purchase

Buttons: New Loan, Import

4

Pipeline - Click on the line item of the loan for access

1
LE Issued
LE Out

1
Rate Locked
Rate Locked

19
Loans Registered
All Loans

6
Outstanding PTD Conditions

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All Loans
All Loans

+ Start New Loan
(Click or Drop file to Start)

Pricing

<input type="checkbox"/>	Loan Numl	Conditio	Borrower	Subject Property	Loan Status	Lock Exp Date	Loan Amou	Note Rat	Loan Type	Loan Purpos
<input type="checkbox"/>	53112	0	Ken N Customer	10655 Birch St	PreQual		300,000...	5.490	Conventio...	Purchase
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<input type="checkbox"/>	53108	0	Sam Austin		In Processing		400,000...	6.000	Conventio...	Purchase
<input type="checkbox"/>	53107	0	Richard Brown	4657 Margo Court	Submit to Pr...		400,000...	6.000	Conventio...	Purchase
<input type="checkbox"/>	53105	0	test est		PreQual		0.00	0.000		
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<input type="checkbox"/>	2507030...	0	Piper Borrower	333 Arbonview Dr	Clear to Close		400,000...	6.000	Conventio...	Purchase
<input type="checkbox"/>	2507030...	0	Ken N Customer	10655 Birch St	PreQual		250,000...	7.311	Conventio...	Purchase
<input type="checkbox"/>	2507030...	0	Sung N TPOTest	10655 Birch St	Clear to Close		250,000...	7.311	Conventio...	Purchase
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<input type="checkbox"/>	53018	0			PreQual		0.00	0.000		
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<input type="checkbox"/>	2505190...	0	Melissa Adams	9600 Bull Creek Dr	Submit to Pr...		400,000...	6.000	Conventio...	Purchase
<input type="checkbox"/>	2505140...	0	Bobby Day	4657 Margo Ct	In Underwriti...		240,000...	7.000	Conventio...	Purchase

New Loan

Import

6

Quote - Navigate to different sections of the application quickly through the General tab.

Broker LO, - Wholesale Broker

Loans ▾ 53112—Ken N Customer, JR X ▾ Lock Quote

Quote My Conditions Summary List Request

General

Borrower Information

Credit

Income and Employment

Assets

Property You Own

Liabilities

Loan & Product Information

Programs & Pricing

Subject Property

SSN 500-50-7000

Date of Birth 07/04/1966

Citizenship US Citizen

Preferred Language

Other

Will you occupy the property as your primary residence? Yes

Marital Status Unmarried(Single, Divorced, W... Married To

Number of Dependents 0 Ages

Middle Name	Last Name	Suffix	Occupant	Main Contact
N	Customer	JR	Yes	

Current Address

Address 10655 Birch St

Unit Type

Unit Number

City Burbank

State CA ZIP 91502

County

Country Other

Years at Address 3 Months at Address 7

Own/Rent Rent

Contact Information

Home Phone (818) 222-2222

Cell Phone (818) 444-1234

Work Phone Ext.

Fax

Email ken.c@fanniema.com

Best Contact Cell Phone

Best Time to Call 11:30AM

Present Primary Housing Expenses

7

Quote - Run interfaces such as Credit, Mortgage Insurance, Pricing, or AUS. Register your Loan once all tasks are complete (not just tasks on this screen but all screens)

Note: Register Loan will send the file to the Lender.

Subject Property

Prequalification Same as Current Address

Address 10655 Birch St

Unit Type

Unit Number

City Burbank

State CA ZIP 91502-1234

County LOS ANGELES

Property Type Single Family Residence

Attachment Type Attached

Number of Units 1 Year Built 1965

Number of ADUs Estate Held Fee Simple

FHA Loan Information

FHA License Number

Section of the Act

Other Loan Information

Agency Case Number

Lender Case Number C01_v1.8.2

MERS MIN Number 111111120251023021

Register Loan Mortgage Insurance Credit Programs Save Delete Pricing

8 List - Click "List" to navigate to the Documents section

Broker LO, - Wholesale Broker

Loans ▾ 53112—Ken N Customer, JR x ▾ Lock Quote

Quote My Conditions Summary **List** Request

General

Borrower Information

Number	First Name	Middle Name	Last Name	Suffix	Occupant	Main Contact
<input type="checkbox"/> 1	Ken	N	Customer	JR	Yes	

Personal Information

First Name: Ken
 Middle Name: N
 Last Name: Customer
 Suffix: JR
 SSN: 500-50-7000
 Date of Birth: 07/04/1966
 Citizenship: US Citizen
 Preferred Language:
 Other:
 Will you occupy the property as your primary residence? Yes
 Marital Status: Unmarried(Single, Divorced, W... Married To:
 Present Primary Housing Expenses

Current Address

Address: 10655 Birch St
 Unit Type:
 Unit Number:
 City: Burbank
 State: CA ZIP: 91502
 County:
 Country: Other
 Years at Address: 3 Months at Address: 7
 Own/Rent: Rent

Contact Information

Home Phone: (818) 222-2222
 Cell Phone: (818) 444-1234
 Work Phone: Ext.
 Fax:
 Email: ken.c@fanniema.com
 Best Contact: Cell Phone
 Best Time to Call: 11:30AM

9 Documents - Drag and Drop documents into the File Drop Zone or you can select the Add from Computer button to access files in your system.

Broker LO, - Wholesale Broker - | Help | Log out

Loans ▾ 53112—Ken N Customer, JR x ▾ Documents **List**

Quote My Conditions Summary List Request

SEARCH [] x [] Show Full Description Show Active Only Show All Template

Drag a column header and drop it here to group by that column

Document	Borrower	Category	Type	Description	By	Status	Status Date & Time	Upload Date & Time	Review Date & Time	Due Date
<input type="checkbox"/>	Customer Characteristics (1)	Ken N Customer, JR			Broker LO	Uploaded	10/23/2025 12:53:58 PM	10/23/2025 12:53:56 PM		

+ File Drop Zone or Click to Upload

Save Add from Computer

10

Documents - Pull in Document Templates via the Templates dropdown.

Broker LO, - Wholesale Broker - | Help | Log out

2—Ken N Customer, JR > Documents > List

itions Summary List Request

Search: [] Show Full Description Show Active Only Show All [] Template: TPO stacking template

Click and drag here to group by that column

	Borrower	Category	Type	Description	By	Status	Status Date & Time	Upload Date & Time	Review Date & Time	Due Date
acteristics (1)	Ken N Customer JR				Broker LO	Uploaded	10/23/2025 12:53:58 PM	10/23/2025 12:53:56 PM		

Decorative purple flower icon

11 Documents - Choose from 2 options for your Template

Sort Only - Pulls in just the document order

Add Placeholders - Pulls in the document order and adds "Placeholders" which are shown in red and indicate that the item is needed.

The screenshot shows the 'Documents' list view for a loan. A 'Template' dialog box is open, allowing the user to choose between 'Sort Only' (selected) and 'Add Placeholders'. The background table shows a single document entry: 'Customer Characteristics (1)' by 'Ken N Customer, JR' with status 'Broker LO' and 'Uploaded'.

Document	Borrower	Category	Type	Description	By	Status	Status Date & Time	Upload Date & Time	Review Date
Customer Characteristics (1)	Ken N Customer, JR				Broker LO	Uploaded	10/23/2025 12:53:58 PM	10/23/2025 12:53:56 PM	

12 Documents - Placeholders are added and the template is in order.

The screenshot shows the 'Documents' list view with a 'TPO stacking template' selected. The list contains 14 documents, all with a status of 'Placeholder'. A 'Documents Not in Template' section is also visible at the bottom, containing one document: 'Customer Characteristics (1)'.

Document	Borrower	Category	Type	Description	By	Status	Status Date & Time	Upload Date & Time	Review Date
Loan Application		Processing	Loan Applicat...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
Borrower Signature Authorization ...		Form	Borrower Sig...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
Credit Score Information Disclosure		Form	Credit Score I...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
Pre-Approval Letter		Form	Pre-Approval ...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
Bank Statement		Assets	Bank Statem...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
Pay Stub		Income	Pay Stub		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
IRS W2		Income	IRS W2		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
Tax Return		Income	Tax Return		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
Drivers License		Borrower	Drivers License		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
Gift Letter - Borrower		Assets	Gift Letter - B...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
Credit Report		Credit	Credit Report		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
Automated Underwriting Feedback		Credit Appro...	Automated U...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	

Document	Borrower	Category	Type	Description	By	Status	Status Date & Time	Upload Date & Time	Review Date
Customer Characteristics (1)	Ken N Customer, JR				Broker LO	Uploaded	10/23/2025 7:53:58 AM		

13

Documents - To add a document to a placeholder from your computer, select Add from Computer

Show Full Description

Show Active Only Show All

Template TPO stacking template

Drag a column header and drop it here to group by that column

	Document	Borrower	Category	Type	Description	By	Status	Status Date & Time	Upload Date & Time	Review Dat
<input type="checkbox"/>	Loan Application		Processing	Loan Applicat...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Borrower Signature Authorization ...		Form	Borrower Sig...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Credit Score Information Disclosure		Form	Credit Score I...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Pre-Approval Letter		Form	Pre-Approval ...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Bank Statement		Assets	Bank Statem...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Pay Stub		Income	Pay Stub		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	IRS W2		Income	IRS W2		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Tax Return		Income	Tax Return		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input checked="" type="checkbox"/>	Drivers License		Borrower	Drivers License		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Gift Letter - Borrower		Assets	Gift Letter - B...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Credit Report		Credit	Credit Report		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Automated Underwriting Feedback		Credit Appro...	Automated U...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	

Documents Not in Template

Drag a column header and drop it here to group by that column

	Document	Borrower	Category	Type	Description	By	Status	Status Date & Time	Upload Date & Time	Review Dat
<input type="checkbox"/>	Customer Characteristics (1)	Ken N Customer JR				Broker LO	Uploaded	10/23/2025 7:53:58 AM		

+ File Drop Zone or Click to Upload

14 Documents - Select Browse, find your document, and select Add.

***Note - Select Close the window checkbox to close when the upload is complete.

Documents **Browse**

Teams Background 1.pdf
Ready

Close the window when upload is complete.

Add

15 Documents - The Placeholder item is moved to the bottom to the Documents Not in Template section. Select the magnifying glass to refresh the Documents screen at anytime.

Loans ▾ 53112—Ken N Customer, JR ✕ Documents List

Quote My Conditions Summary List Request

Show Full Description Show Active Only Show All Template TPO stacking template ▾

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Document	Borrower	Category	Type	Description	By	Status	Status Date & Time	Upload Date & Time	Review Dat
<input type="checkbox"/>	Loan Application		Processing	Loan Applicat...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Borrower Signature Authorization ...		Form	Borrower Sig...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Credit Score Information Disclosure		Form	Credit Score I...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Pre-Approval Letter		Form	Pre-Approval ...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Bank Statement		Assets	Bank Statem...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Pay Stub		Income	Pay Stub		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	IRS W2		Income	IRS W2		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Tax Return		Income	Tax Return		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Drivers License		Borrower	Drivers License		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Gift Letter - Borrower		Assets	Gift Letter - B...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Credit Report		Credit	Credit Report		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/>	Automated Underwriting Feedback		Credit Appro...	Automated U...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	

Documents Not in Template

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Document	Borrower	Category	Type	Description	By	Status	Status Date & Time	Upload Date & Time	Review Dat
<input type="checkbox"/>	Customer Characteristics (1)	Ken N Customer JR				Broker LO	Uploaded	10/23/2025 7:53:58 AM		
<input type="checkbox"/>	Teams Background 1	Ken N Customer JR				Broker LO	Uploaded	10/29/2025 5:19:22 AM		

16

Documents - Once the screen is refreshed or the document completes uploading, the font will change from red to black and the status will update to Uploaded

<input type="checkbox"/>	Borrower Signature Authorization ...	Form	Borrower Sig...	Broker1	Placeholder	10/29/2025 10:17:50 AM
<input type="checkbox"/>	Credit Score Information Disclosure	Form	Credit Score I...	Broker1	Placeholder	10/29/2025 10:17:50 AM
<input type="checkbox"/>	Pre-Approval Letter	Form	Pre-Approval ...	Broker1	Placeholder	10/29/2025 10:17:50 AM
<input type="checkbox"/>	Bank Statement	Assets	Bank Statem...	Broker1	Placeholder	10/29/2025 10:17:50 AM
<input type="checkbox"/>	Pay Stub	Income	Pay Stub	Broker1	Placeholder	10/29/2025 10:17:50 AM
<input type="checkbox"/>	IRS W2	Income	IRS W2	Broker1	Placeholder	10/29/2025 10:17:50 AM
<input type="checkbox"/>	Tax Return	Income	Tax Return	Broker1	Placeholder	10/29/2025 10:17:50 AM
<input type="checkbox"/>	Drivers License	Borrower	Drivers License	Broker1	Placeholder	10/29/2025 10:17:50 AM
<input type="checkbox"/>	Gift Letter - Borrower	Assets	Gift Letter - B...	Broker1	Placeholder	10/29/2025 10:17:50 AM
<input type="checkbox"/>	Credit Report	Credit	Credit Report	Broker1	Placeholder	10/29/2025 10:17:50 AM
<input type="checkbox"/>	Automated Underwriting Feedback	Credit Appro...	Automated U...	Broker1	Placeholder	10/29/2025 10:17:50 AM

Documents Not in Template

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Document	Borrower	Category	Type	Description	By	Status	Status Date & Time
<input type="checkbox"/>	Customer Characteristics (1)	Ken N Customer JR				Broker LO	Uploaded	10/23/2025 7:53:58 AM
<input type="checkbox"/>	Teams Background 1	Ken N Customer JR				Broker LO	Uploaded	10/29/2025 5:19:25 AM

+ File Drop Zone or Click to Upload

Save Add from Computer

17

Documents - Select on a document to see additional options such as: Download, Email, or E-sign.

Loans 53112—Ken N Customer, JR Documents List

List	Pending	Deleted	Summary						
<input type="checkbox"/>	Drivers License			Borrower	Drivers License	jsmith	Placeholder	11/03/2025 2:54:16 PM	11/03/2025 2:54:16 PM
<input type="checkbox"/>	Tax Return			Income	Tax Return	jsmith	Placeholder	11/03/2025 2:54:16 PM	11/03/2025 2:54:16 PM
<input type="checkbox"/>	IRS W2			Income	IRS W2	jsmith	Placeholder	11/03/2025 2:54:16 PM	11/03/2025 2:54:16 PM

Documents Not in Template

Drag a column header and drop it here to group by that column

<input type="checkbox"/>	Document	Borrower	Category	Type	Description	By	Status	Status Date & Time	Upload Date & Time	Review Date & Time
<input checked="" type="checkbox"/>	Fees Worksheet	Ken N Customer JR	Disclosure	Fees Worksh...		Janice Smith	Added from Libra...	11/03/2025 8:55:19 AM		
<input type="checkbox"/>	Flood Insurance Disclosure	Ken N Customer JR	Form	Flood Insura...		Janice Smith	Added from Libra...	11/03/2025 8:55:17 AM		
<input type="checkbox"/>	PHA Gift Letter	Ken N Customer JR	Form	FHA Gift Letter		Janice Smith	Added from Libra...	11/03/2025 8:55:17 AM		
<input type="checkbox"/>	Fair Lending Notice Disclosure (CF...	Ken N Customer JR	Form	Fair Lending ...		Janice Smith	Added from Libra...	11/03/2025 8:55:18 AM		

+ File Drop Zone or Click to Upload

Save Delete Add from Computer Add from Library Request Merge Add Package Review View Download Email Edit Move Up Move Down eSign

18 Request - Click Request to navigate to the Lock Request screen

Broker LO, - Wholesale Broker

Loans ▾ 53112—Ken N Customer, JR ✕ Documents List

Quote My Conditions Summary List Request

⊞ Show Full Description Show Active Only Show All Template TPO stacking template

Drag a column header and drop it here to group by that column

Document	Borrower	Category	Type	Description	By	Status	Status Date & Time	Upload Date & Time	Review Dat
<input type="checkbox"/> Loan Application		Processing	Loan Applicat...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/> Borrower Signature Authorization ...		Form	Borrower Sig...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/> Credit Score Information Disclosure		Form	Credit Score I...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/> Pre-Approval Letter		Form	Pre-Approval ...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/> Bank Statement		Assets	Bank Statem...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/> Pay Stub		Income	Pay Stub		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/> IRS W2		Income	IRS W2		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/> Tax Return		Income	Tax Return		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/> Drivers License		Borrower	Drivers License		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/> Gift Letter - Borrower		Assets	Gift Letter - B...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/> Credit Report		Credit	Credit Report		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	
<input type="checkbox"/> Automated Underwriting Feedback		Credit Appro...	Automated U...		Broker1	Placeholder	10/29/2025 10:17:50 AM	10/29/2025 10:17:50 AM	

Documents Not in Template

Drag a column header and drop it here to group by that column

Document	Borrower	Category	Type	Description	By	Status	Status Date & Time	Upload Date & Time	Review Dat
<input type="checkbox"/> Customer Characteristics (1)	Ken N Customer JR				Broker LO	Uploaded	10/23/2025 7:53:58 AM		
<input type="checkbox"/> Team Background 1	Ken N Customer JR				Broker LO	Uploaded	10/23/2025 8:10:36 AM		

19 Lock - Request Type will default to Initial. Verify the Lock Period.

Broker LO, - Wholesale Broker

Loans ▾ 53112—Ken N Customer, JR ✕ Lock Request

Quote My Conditions Summary List Request

Lock Request

Request Type: **Initial** Lock Request Date/Time: Lock Request Rate: 5.490%

Lock Expiration: Lock Date: Lock Period: 15

Cancel Reason: Cancel Date: Extension Period:

Float Down Option: Float Down Date:

Lock Request Note:

Lock Confirmation

Lock Confirmation Date:

Lock Confirmation Note:

Lock Price

Last Priced Date/Time: 10/29/2025 10:13:37 AM

Group: 30 Yr Fixed Group ID:

Investor/Provider: PHH Agency Investor/Provider ID:

20

Lock - Select Request Lock to make your lock request

Lock Request

Request Type	Initial	Lock Request Date/Time		Lock Request Rate	5.490%
Lock Expiration		Lock Date		Lock Period	15
Cancel Reason		Cancel Date		Extension Period	
Float Down Option	<input type="checkbox"/>	Float Down Date			
Lock Request Note	<input type="text"/>				

Lock Confirmation

Lock Confirmation Date	
Lock Confirmation Note	<input type="text"/>

Lock Price

Last Priced Date/Time	10/29/2025 10:13:37 AM	Group ID	
Group	30 Yr Fixed	Investor/Provider ID	
Investor/Provider	PHH Agency	Program ID	a33c6406-eb1f...
Program	Conventional FNMA	Product Code	100FNMA30
Product	30yr Fixed P&I Conforming- FNMA		

Buttons: Save, **Request Lock**, Relock, Update Requested, Compare Lock History, Compare Lock Request, Pricing

21

Lock - Enter any notes to be displayed in the Status section at the bottom of the screen.

Lock Request

Request Type	Initial	Lock Request Date/Time		Lock Request Rate	5.490%
Lock Expiration		Lock Date		Lock Period	15
Cancel Reason		Cancel Date		Extension Period	
Float Down Option	<input type="checkbox"/>	Float Down Date			
Lock Request Note	<input type="text"/>				

Lock Confirmation

Lock Confirmation Date	
Lock Confirmation Note	<input type="text"/>

Lock Price

Last Priced Date/Time	10/29/2025 10:13:37 AM	Group ID	
Group	30 Yr Fixed	Investor/Provider ID	
Investor/Provider	PHH Agency	Program ID	a33c6406-eb1f...
Program	Conventional FNMA	Product Code	100FNMA30
Product	30yr Fixed P&I Conforming- FNMA		

Send and Status Notes

Please lock asap

Buttons: Save, Request Lock, Relock, Update Requested, Compare Lock History, Compare Lock Request, Pricing

22 Quote - Return to the Quote screen to review data before loan registration

Broker LO, - Wholes

Loans 53112—Ken N Customer, JR Lock Request

Quote My Conditions Summary List Request

Lock Request

Request Type: Initial
 Lock Request Date/Time: 10/29/2025 10:21:10 AM
 Lock Request Rate: 5.490%
 Lock Expiration:
 Lock Date:
 Lock Period: 15
 Cancel Reason:
 Cancel Date:
 Extension Period:
 Float Down Option:
 Float Down Date:
 Lock Request Note:

Lock Confirmation

Lock Confirmation Date:
 Lock Confirmation Note:

Lock Price

Last Priced Date/Time: 10/29/2025 10:13:37 AM
 Group: 30 Yr Fixed Group ID:

23 Quote - Click on the "Register Loan" button to register the loan with the Lender

General

Borrower Information

Number	First Name	Middle Name	Last Name	Suffix	Occupant	Main Contact
<input type="checkbox"/> 1	Ken	N	Customer	JR	Yes	

Personal Information

First Name: Ken
 Middle Name: N
 Last Name: Customer
 Suffix: JR
 SSN: 500-50-7000
 Date of Birth: 07/04/1966
 Citizenship: US Citizen
 Preferred Language:
 Other:
 Will you occupy the property as your primary residence?: Yes

Current Address

Address: 10655 Birch St
 Unit Type:
 Unit Number:
 City: Burbank
 State: CA ZIP: 91502
 County:
 Country: Other
 Years at Address: 3 Months at Address: 7
 Own/Rent: Rent

Contact Information

Home Phone: (818) 222-2222
 Cell Phone: (818) 444-1234
 Work Phone: Ext.
 Fax:
 Email: ken.c@fanniema.com
 Best Contact: Cell Phone
 Best Time to Call: 11:30AM

Marital Status

Marital Status: Unmarried(Single, Divorced, W...
 Married To:
 Number of Dependents: 0 Ages:

Present Primary Housing Expenses

Rent: \$ 3,500.00
 Homeowner's Insurance: \$
 Mortgage Insurance: \$
 First Mortgage (P&I): \$
 Supplemental Property Insurance: \$
 Association/Project Dues: \$
 Subordinate Lien(s) (P&I): \$
 Property Taxes: \$
 Other: \$

Register Loan Mortgage Insurance Credit Programs Save Delete Pricing

24 Quote - Add any necessary notes

General

Borrower Information

Number	First Name	Middle Name	Last Name	Suffix	Occupant	Main Contact
1	Ken	N	Customer	JR	Yes	

Personal Information

First Name: Ken
 Middle Name: N
 Last Name: Customer
 Suffix: JR
 SSN: 500-50-7000
 Date of Birth: 07/04/1966
 Citizenship: US Citizen
 Preferred Language:
 Other:
 Will you occupy the property as your primary residence? Yes

Current Address

Address:
 Unit Type:
 Unit Number:
 City:
 State:
 County:
 Country:
 Years at Address: 3 Months at Address: 7
 Own/Rent: Rent

Contact Information

Home Phone: (818) 222-2222
 Cell Phone: (818) 444-1234
 Work Phone:
 Fax:
 Email: ken.c@fanniema.com
 Best Contact: Cell Phone
 Best Time to Call: 11:30AM

Marital Status

Unmarried(Single, Divorced, W... Married To:
 Number of Dependents: 0 Ages:
 Present Primary Housing Expenses

Loan Mortgage Insurance Credit Programs Save Delete Pricing

Send and Status Notes

Loan is ready for registration.

Save

25 My Conditions - Click "My Conditions" to verify and manager Loan Conditions from the Lender.

Broker LO, - Wholesale Broker

Loans 53112 - Ken N Customer, JR Production Quote

Quote My Conditions Summary List Request

General

Borrower Information

Number	First Name	Middle Name	Last Name	Suffix	Occupant	Main Contact
1	Ken	N	Customer	JR	Yes	

Personal Information

First Name: Ken
 Middle Name: N
 Last Name: Customer
 Suffix: JR
 SSN: 500-50-7000
 Date of Birth: 07/04/1966
 Citizenship: US Citizen
 Preferred Language:
 Other:
 Will you occupy the property as your primary residence? Yes

Current Address

Address: 10655 Birch St
 Unit Type:
 Unit Number:
 City: Burbank
 State: CA ZIP: 91502
 County:
 Country: Other
 Years at Address: 3 Months at Address: 7
 Own/Rent: Rent

Contact Information

Home Phone: (818) 222-2222
 Cell Phone: (818) 444-1234
 Work Phone:
 Fax:
 Email: ken.c@fanniema.com
 Best Contact: Cell Phone
 Best Time to Call: 11:30AM

Marital Status

Unmarried(Single, Divorced, W... Married To:
 Number of Dependents: 0 Ages:
 Present Primary Housing Expenses