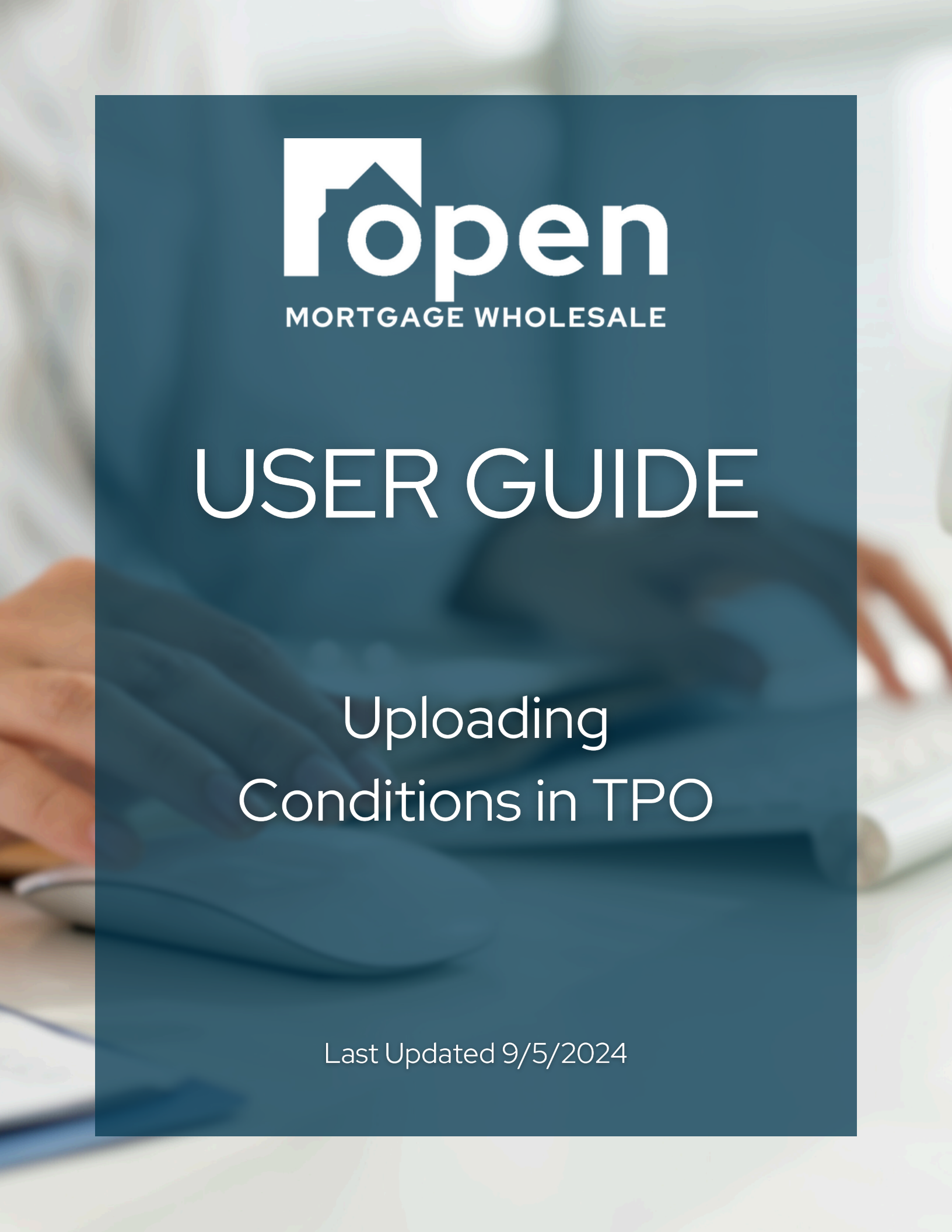


MORTGAGE WHOLESALE

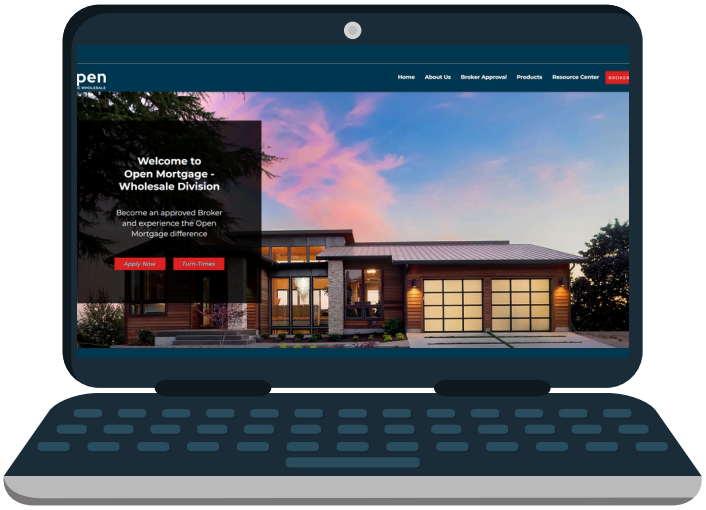
# USER GUIDE

## Uploading Conditions in TPO

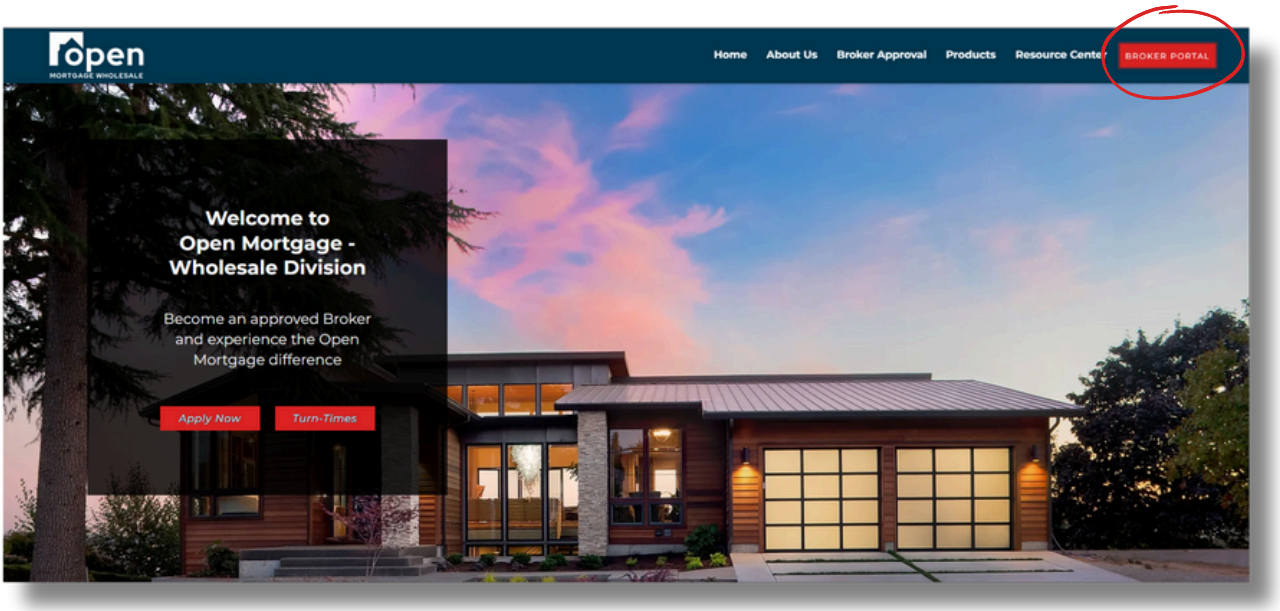
Last Updated 9/5/2024

# Uploading Conditions in TPO

1 Visit OpenWholesale.com



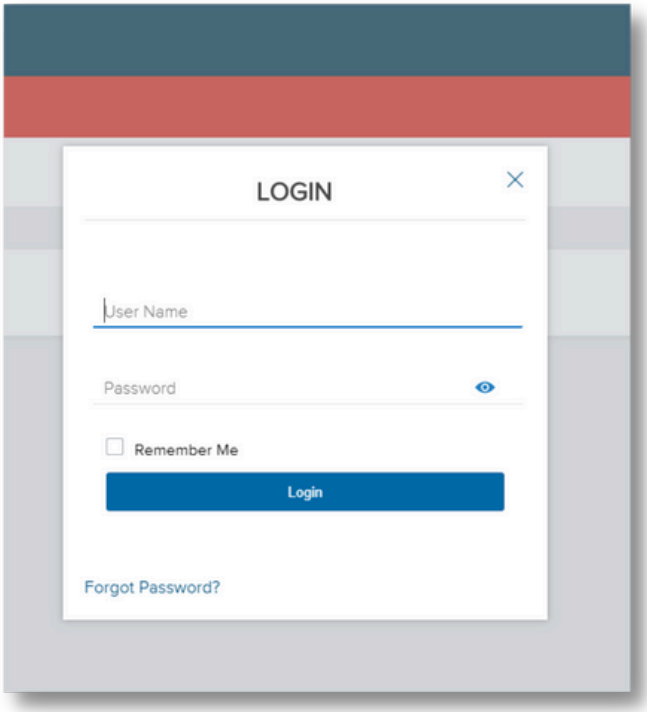

2 Click on the "Broker Portal" button on the top right side of the page



# Uploading Conditions in TPO

**3** Click on the button on the left side of the page to log in

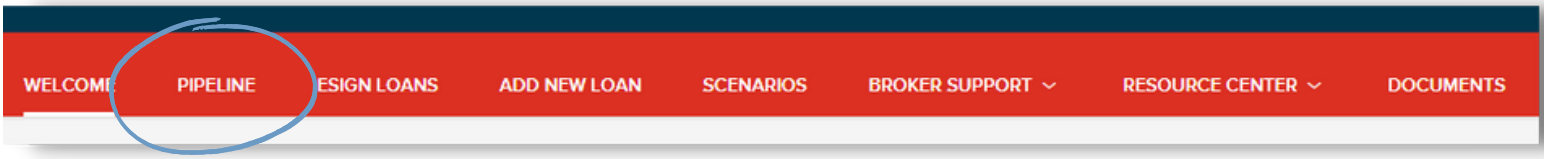
**4** Enter your credentials and click “Login”



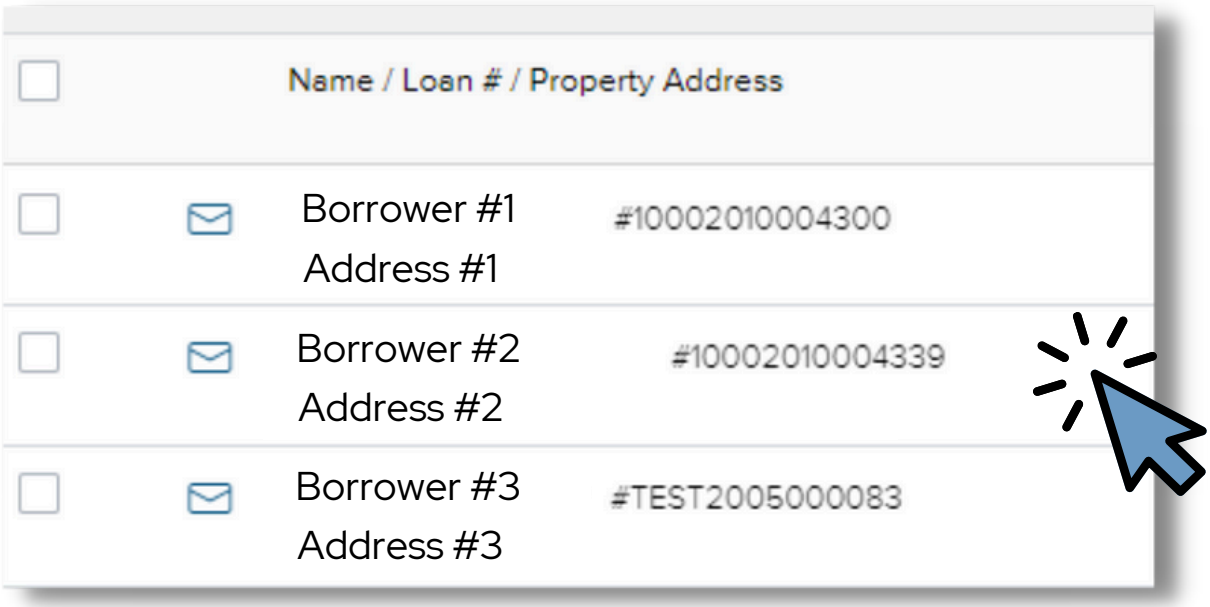

★ If you have forgotten your password, please click the "Forgot Password?" link and follow the prompts to reset it

# Uploading Conditions in TPO

**5** Click on the “Pipeline” link towards the left side of the top menu

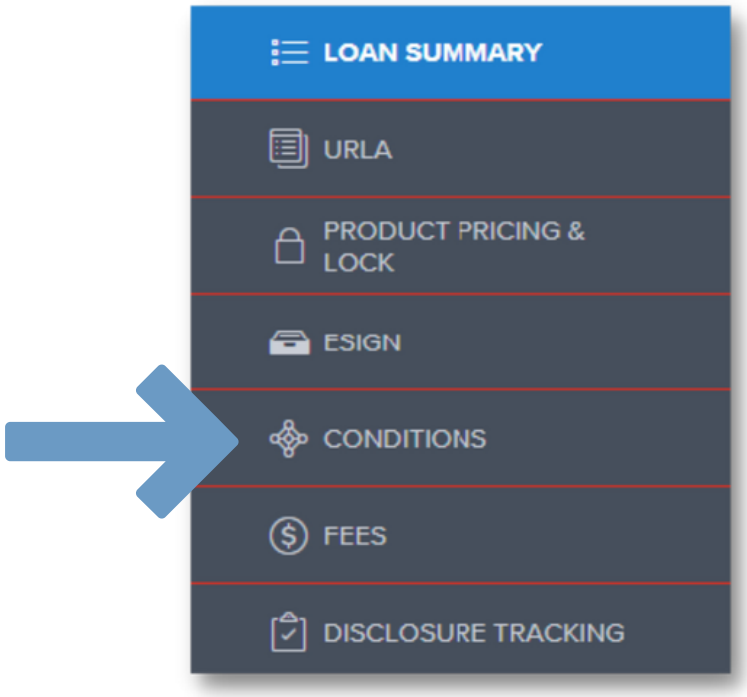



**6** Find the loan you are submitting conditions for and click on it to open the file

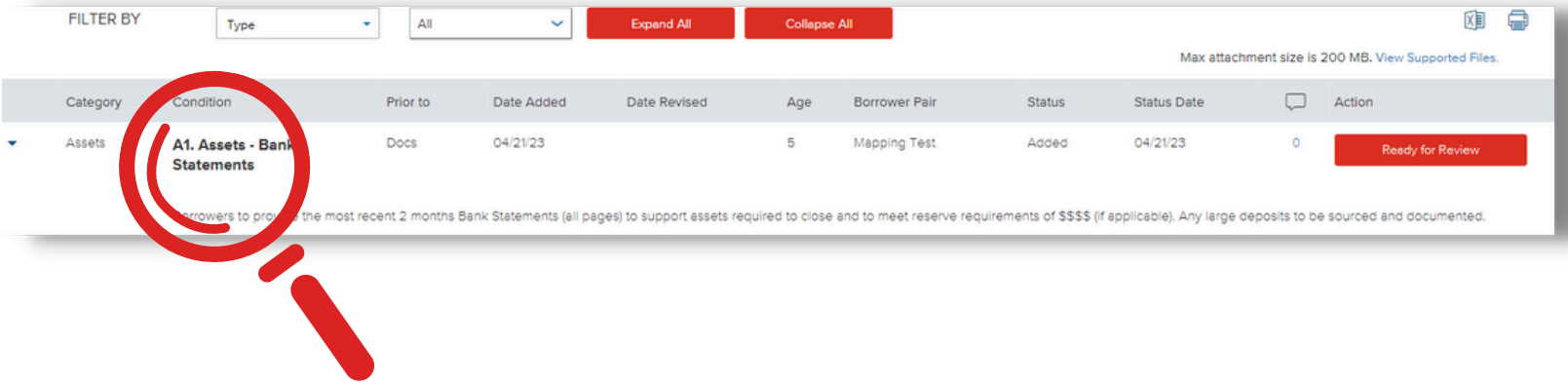


# Uploading Conditions in TPO

**7** Click on "Conditions" on the left hand menu

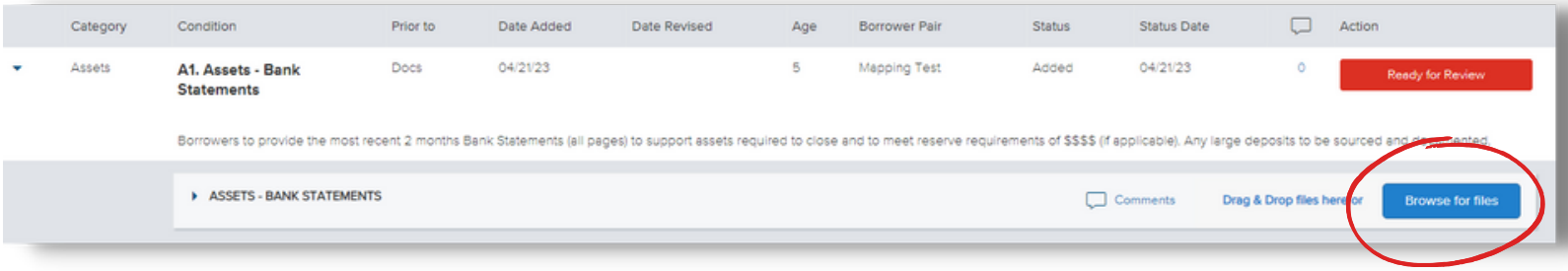



**8** Find each condition you're uploading documents for, using the filters as needed



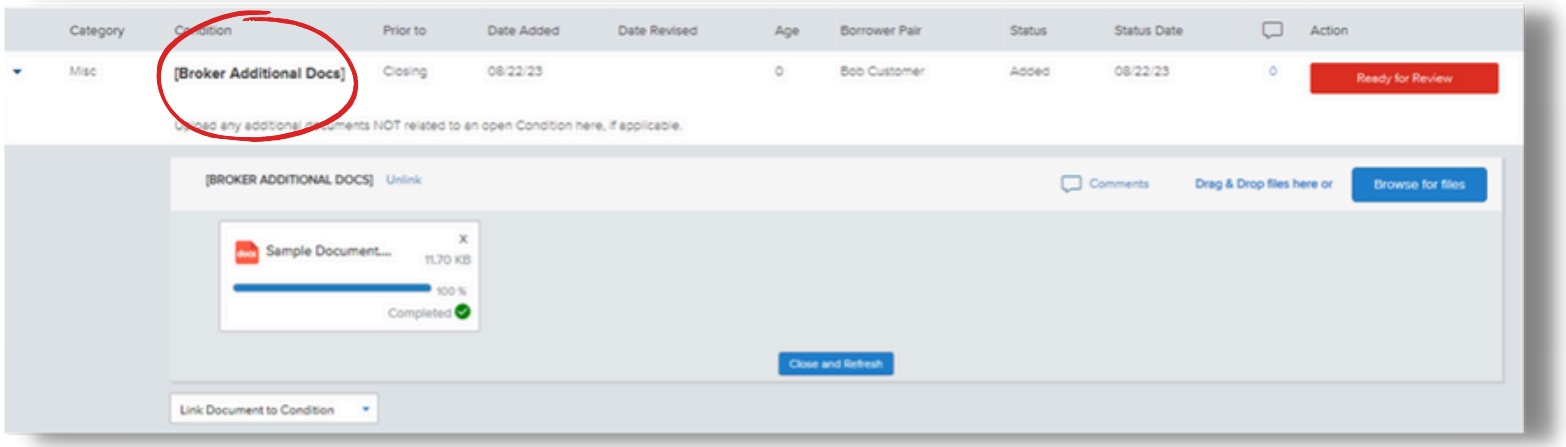
# Uploading Conditions in TPO

**9** Upload documents by either dragging and dropping or clicking the “Browse for files” button and uploading from your device



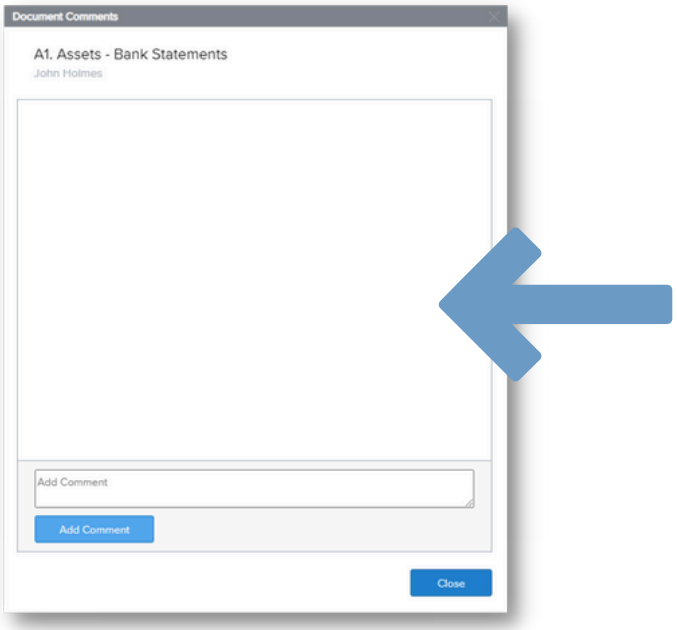

Note that the max document size is 200MB and supported file types include doc, docx, html, jpg, jpe, jpeg, pdf, png, tif, tiff, and txt

**10** Utilize the [Broker Additional Docs] condition to upload any documents that do not pertain to an existing condition

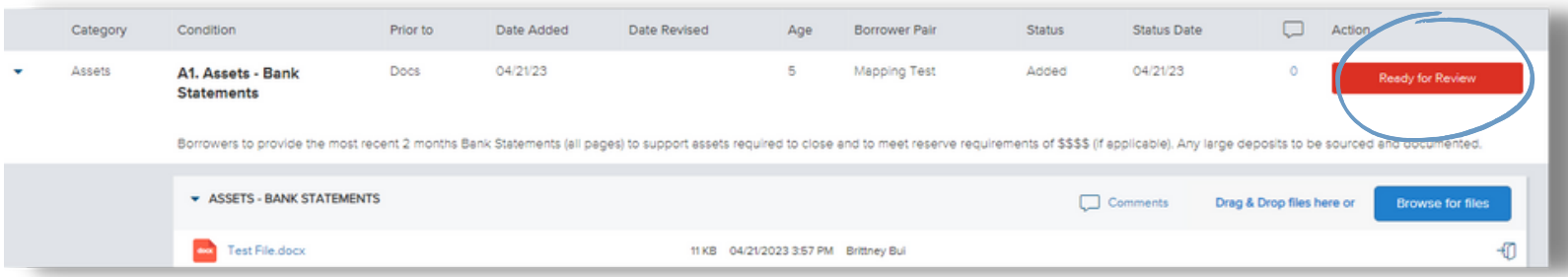


# Uploading Conditions in TPO

**11** Add any comments per condition as necessary

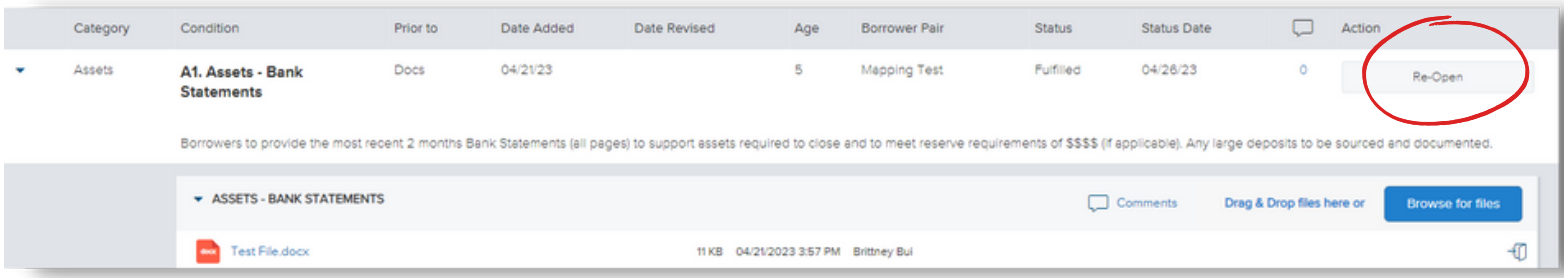



**12** Once document has been uploaded, click "Ready for Review." This button notifies the Underwriting team that the condition is ready for review



# Uploading Conditions in TPO

13 Once the "Ready for Review" button is clicked, the Condition Status will show *Fulfilled*. If you need to add additional documents, click "Re-Open," add documents, then click "Ready for Review" again




14 Your conditions have been uploaded! Please call your Account Executive or 800-644-1258 for additional assistance

Open

MORTGAGE WHOLESALE

EQUAL HOUSING OPPORTUNITY

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