



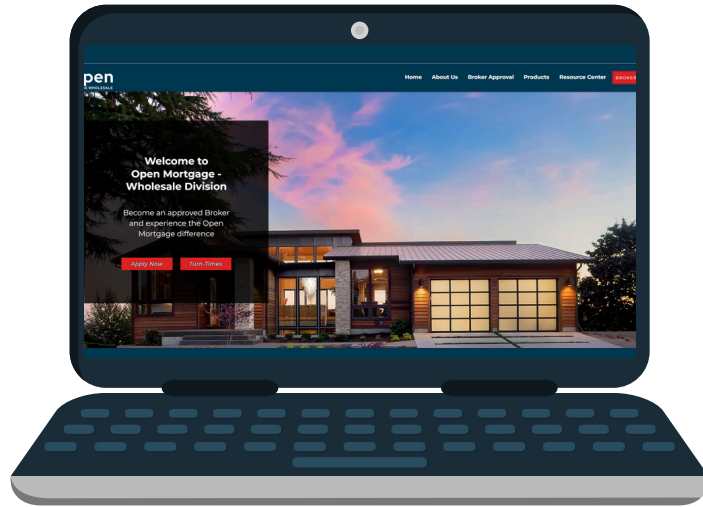
USER GUIDE

Uploading Conditions in TPO

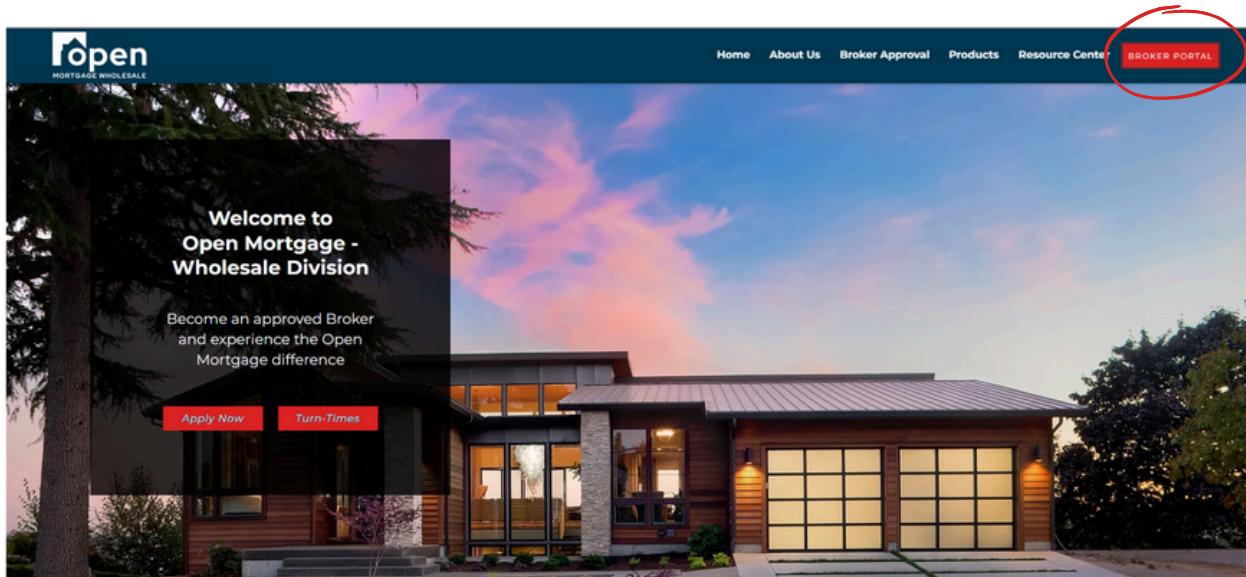
Last Updated 9/5/2024

Uploading Conditions in TPO

- 1 Visit OpenWholesale.com



- 2 Click on the "[Broker Portal](#)" button on the top right side of the page

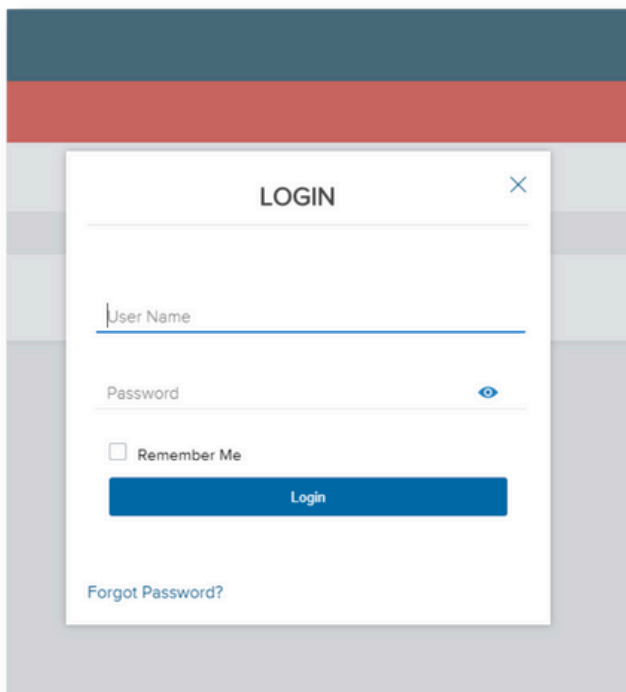


Uploading Conditions in TPO

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



4 Enter your credentials and click "Login"

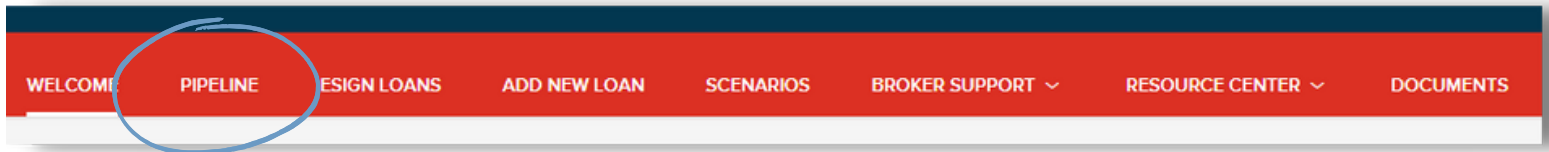


★ If you have forgotten your password, please click the "Forgot Password?" link and follow the prompts to reset it







Uploading Conditions in TPO

- 5 Click on the "Pipeline" link towards the left side of the top menu



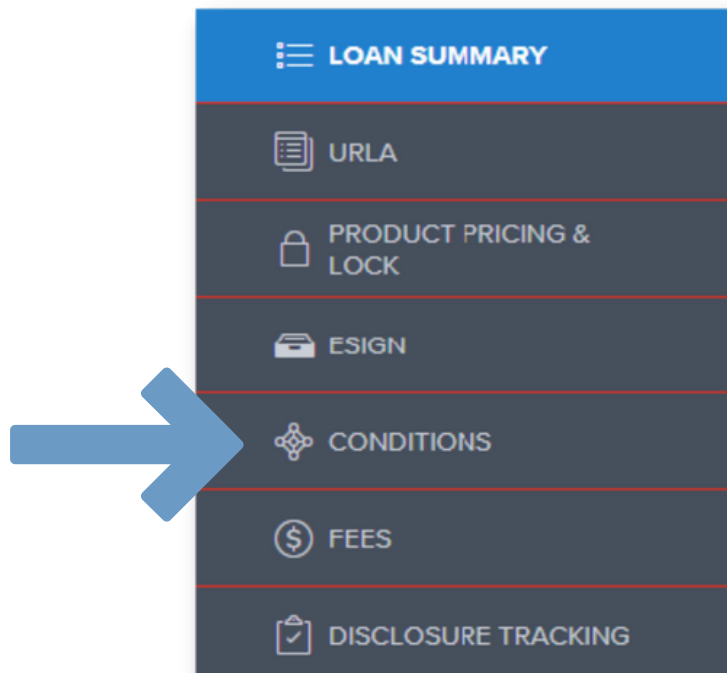
- 6 Find the loan you are submitting conditions for and click on it to open the file

<input type="checkbox"/>		Name / Loan # / Property Address	
<input type="checkbox"/>		Borrower #1 Address #1	#10002010004300
<input type="checkbox"/>		Borrower #2 Address #2	#10002010004339
<input type="checkbox"/>		Borrower #3 Address #3	#TEST2005000083



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

Max attachment size is 200 MB. View Supported Files.

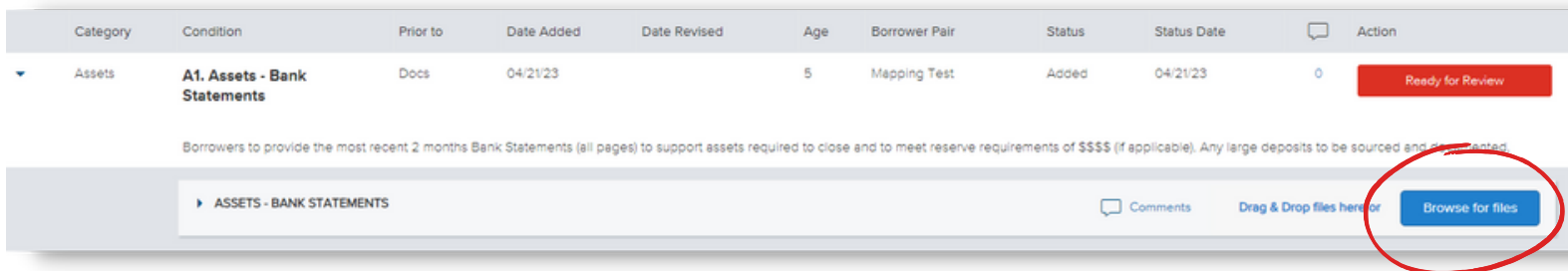
Category	Condition	Prior to	Date Added	Date Revised	Age	Borrower Pair	Status	Status Date	Action
Assets	A1. Assets - Bank Statements	Docs	04/21/23		5	Mapping Test	Added	04/21/23	Ready for Review

Borrowers to provide the most recent 2 months Bank Statements (all pages) to support assets required to close and to meet reserve requirements of \$\$\$\$ (if applicable). Any large deposits to be sourced and documented.



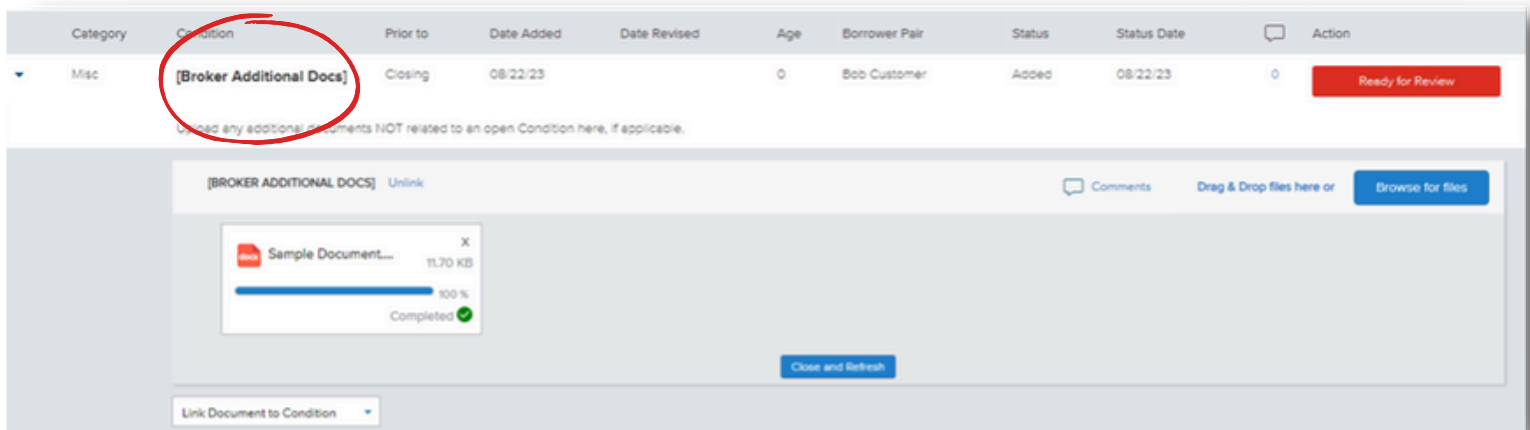
Uploading Conditions in TPO

- 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

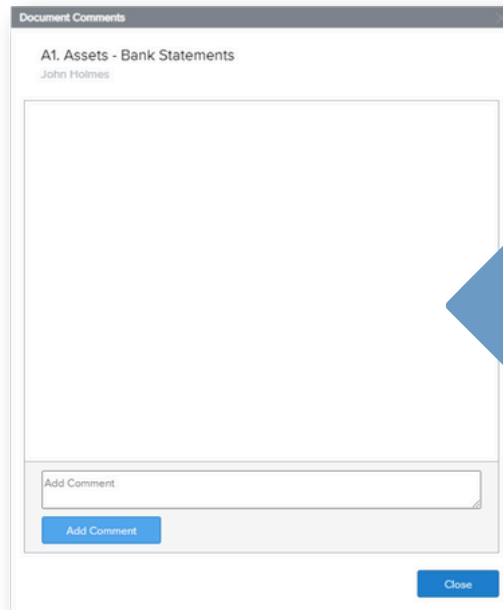
- 10 Utilize the [Broker Additional Docs] condition to upload any documents that do not pertain to an existing condition



Uploading Conditions in TPO

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Add any comments per condition as necessary



The screenshot shows a 'Document Comments' dialog box. At the top, it says 'A1. Assets - Bank Statements' and 'John Holmes'. Below this is a large empty text area for comments. At the bottom of the dialog, there is a text input field labeled 'Add Comment', a blue 'Add Comment' button, and a blue 'Close' button. A large blue arrow points from the right towards the comment area.

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

Category	Condition	Prior to	Date Added	Date Revised	Age	Borrower Pair	Status	Status Date	Comments	Action
Assets	A1. Assets - Bank Statements	Docs	04/21/23		5	Mapping Test	Added	04/21/23	0	Ready for Review

Borrowers to provide the most recent 2 months Bank Statements (all pages) to support assets required to close and to meet reserve requirements of \$\$\$\$ (if applicable). Any large deposits to be sourced and documented.

ASSETS - BANK STATEMENTS

Test File.docx 11 KB 04/21/2023 3:57 PM Brittney Bui



Uploading Conditions in TPO

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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

Category	Condition	Prior to	Date Added	Date Revised	Age	Borrower Pair	Status	Status Date	Comments	Action
Assets	A1. Assets - Bank Statements	Docs	04/21/23		5	Mapping Test	Fulfilled	04/26/23	0	Re-Open

Borrowers to provide the most recent 2 months Bank Statements (all pages) to support assets required to close and to meet reserve requirements of \$\$\$\$ (if applicable). Any large deposits to be sourced and documented.

ASSETS - BANK STATEMENTS

Comments Drag & Drop files here or Browse for files

Test File.docx 11 KB 04/21/2023 3:57 PM Brittney Bui

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





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