



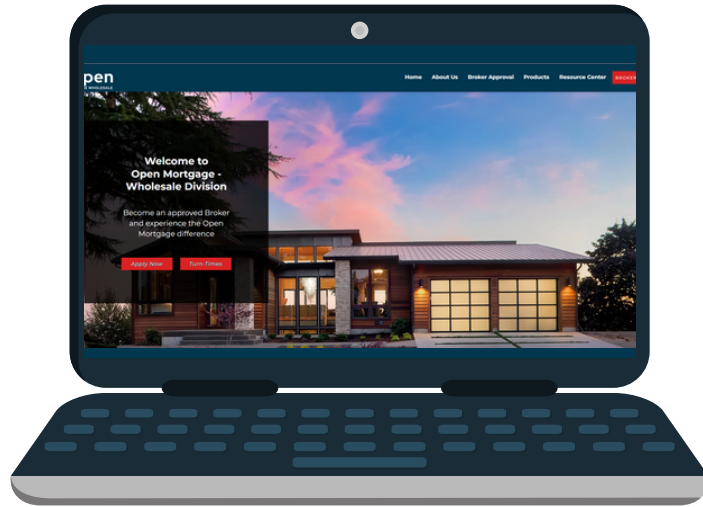
# USER GUIDE

## Submission Form

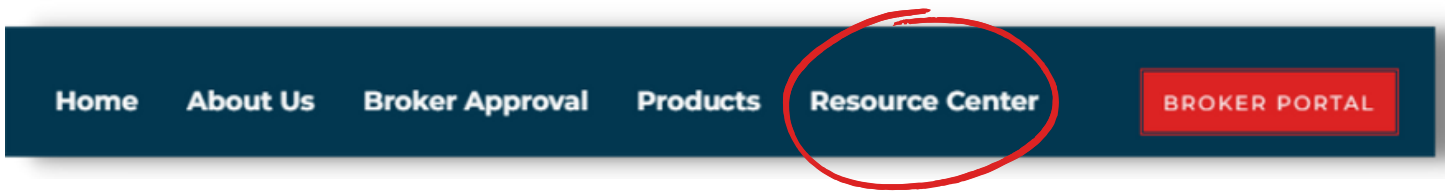
Last Updated 9/5/2024

# Submission Form

- 1 Visit [OpenWholesale.com](https://OpenWholesale.com)

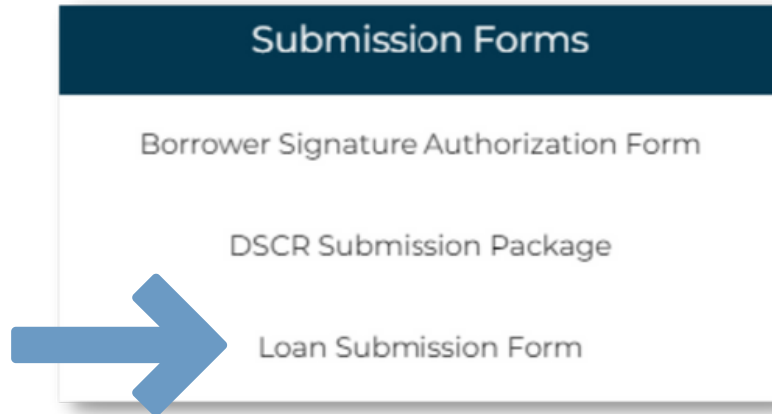


- 2 Click on "[Resource Center](#)" on the right side of the navigation menu



# Submission Form

3 Click on "Loan Submission Form"



4 Click the "Continue" button at the bottom of the page to acknowledge Adobe's Terms of Use and proceed

**LOAN SUBMISSION FORM**  
Please complete form in its entirety prior to uploading it in TPO Connect.

Start

LOAN OVERVIEW	
Loan Type: *Select...	Documents:
Term:	Program:

FILE CONTACTS	
Broker Name: *	Account Executive Name: *

LOAN OFFICER INFORMATION	PROCESSOR INFORMATION
Name: *	Name: *
Email Address: *	Email Address: *
Phone Number: *	Phone Number: *

BROKER COMPENSATION (LPC OR BPC) + PROCESSING FEE	
Choose One: <input type="radio"/> LPC <input type="radio"/> BPC	Flat Fee: \$
Choose \$ or %: \$ or %	3 <sup>rd</sup> Party Processing Fee: <input type="radio"/> Waive <input type="radio"/> \$

*\*Must provide invoice at submission if 3<sup>rd</sup> party processing fee is entered\**

LOAN INFORMATION		
Transaction Type: *Select...	Loan Amount: \$ *	Property Value: \$ *
Property Type: *Select...	Occupancy: *Select...	LTV: % CLTV: * %
Expected Rate: * %	Impounds: Select...	Buydown Contributor: Select...
Fee Buy Out: *Select...	Pre-Locked: <input type="checkbox"/> Conforming/Govt. only	Use Smart Fees? *Select...

**MINIMUM SUBMISSION REQUIREMENTS**

By clicking continue, I acknowledge that I have read and agree to the Adobe [Terms of Use](#). See our [Privacy Policy](#) for details on our privacy practices.

Continue



# Submission Form

- 5 Enter submission details – fill in everything you can to improve accuracy and avoid delays; all fields marked with an asterisk (\*) are required

The screenshot displays a multi-section submission form. Key sections include:

- LOAN OVERVIEW:** Fields for Loan Type, Term, Documents, and Program.
- FILE CONTACTS:** Fields for Broker Name, Account Executive Name, Name, Email Address, and Phone Number.
- LOAN OFFICER INFORMATION:** Fields for Name, Email Address, and Phone Number.
- PROCESSOR INFORMATION:** Fields for Name, Email Address, and Phone Number.
- BROKER COMPENSATION (LPC OR BPC) + PROCESSING FEE:** Radio buttons for LPC or BPC, Flat Fee, and 3rd Party Processing Fee (Waive or \$).
- LOAN INFORMATION:** Fields for Transaction Type, Loan Amount, Property Value, Property Type, Occupancy, LTV, CLTV, Expected Rate, Impounds, Buydown Contributor, and Fee Buy Out.
- MINIMUM SUBMISSION REQUIREMENTS:** Checkboxes for Conforming & FHA/VA and Non-QM requirements, including Completed Submission Form, Credit Report, FNMA 3.4 exported, 3rd Party Invoice, Est. Settlement Statement, Borrower's Authorization, and DSCR.

- ★ Note: Please select smart fees if not providing an Estimated settlement statement. Our set – up team will use smart fees or enter the fees on the estimated settlement statement provided.

- 6 Confirm all details and click "Submit"

Do not submit if you do not trust the requesting party or if you suspect phishing or fraudulent activity

By form filling, I agree to this agreement, the [Consumer Disclosure](#) and to do business electronically with WestGen Lending.

**Submit**





# Submission Form

- 7 If your email has already been verified, you will see a screen saying “You’re all set” and an email confirmation saying that you have completed the submission form with a link to review the document



## You're all set

You finished filling out “Submission Form - Open Mortgage”  
Copies will be e-mailed to all parties. You can also [download a copy](#) of what you just filled.



Please note - this message is automated from Adobe and there are additional steps to submit your form. Please continue reading!

- 8 If your email has not been verified, you will see a box saying “Just one more step” asking for your information

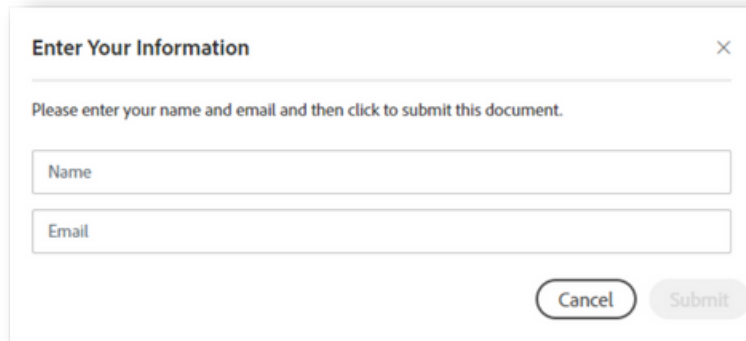
## Just one more step

We just emailed you a link to make sure it's you. It'll only take a few seconds, and we can't accept your input on “Submission Form - Open Mortgage” until you've confirmed.



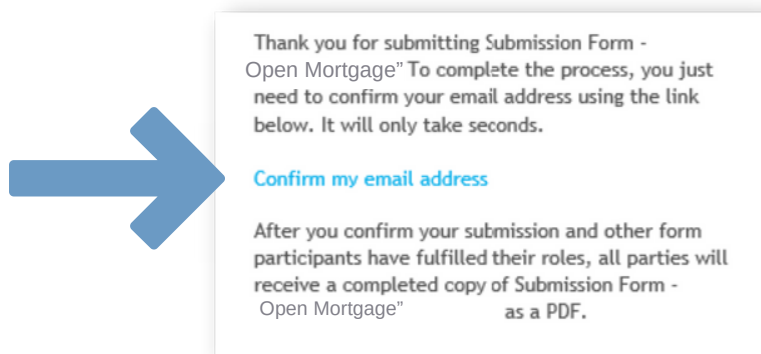
# Submission Form - Email Verification

- 8A** Enter your name and email address and click "Submit"



A screenshot of a web form titled "Enter Your Information" with a close button (X) in the top right corner. Below the title is a horizontal line, followed by the instruction: "Please enter your name and email and then click to submit this document." There are two input fields: "Name" and "Email". At the bottom right, there are two buttons: "Cancel" and "Submit".

- 8B** Once you receive the verification email, click the "Confirm my email address" link



- 8C** When your email has been verified, you will receive an email confirmation saying that you have completed the submission form with a link to review the document



# Submission Form

9 Upload your Submission Form to the loan file (for assistance, please see our "Adding & Submitting New Loans in TPO" guide

10 Your submission form has been completed! Please call your Account Executive or 800-644-1258 for additional assistance





**Open**  
MORTGAGE WHOLESAL



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