



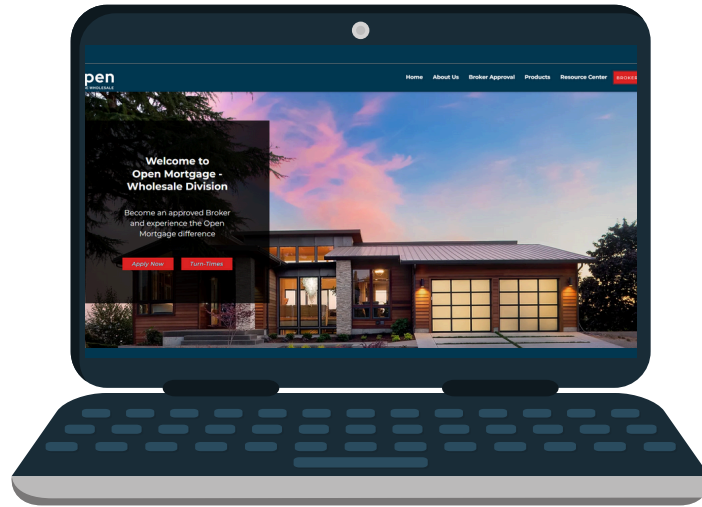
USER GUIDE

Adding & Submitting New Loans in TPO

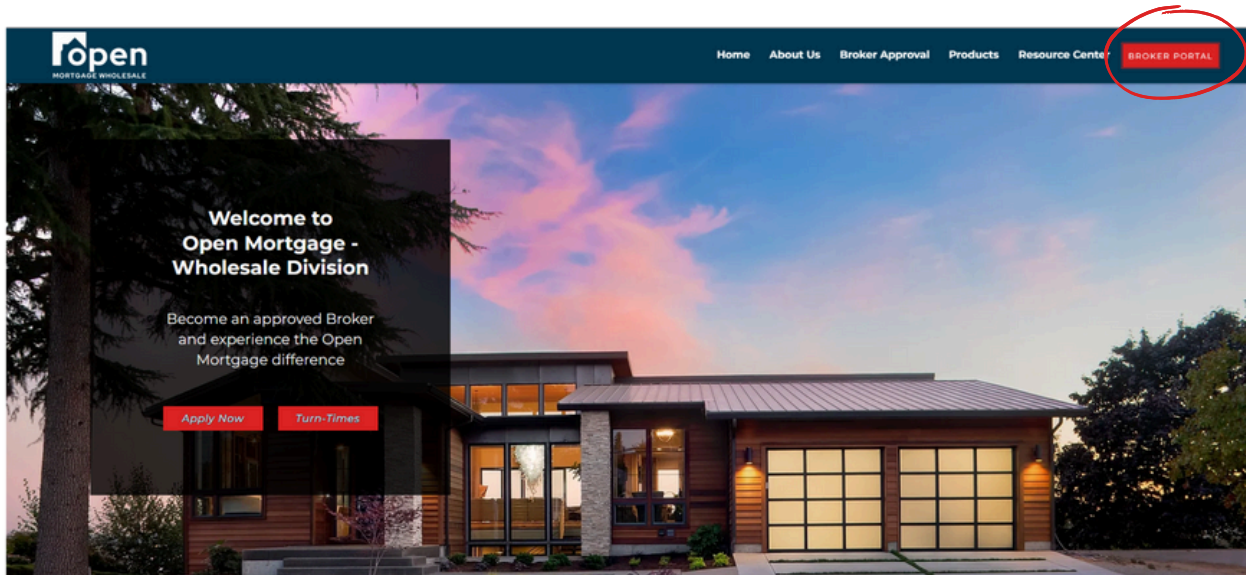
Last Updated 9/5/2024

Adding & Submitting New Loans in TPO

1 Visit OpenWholesale.com



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

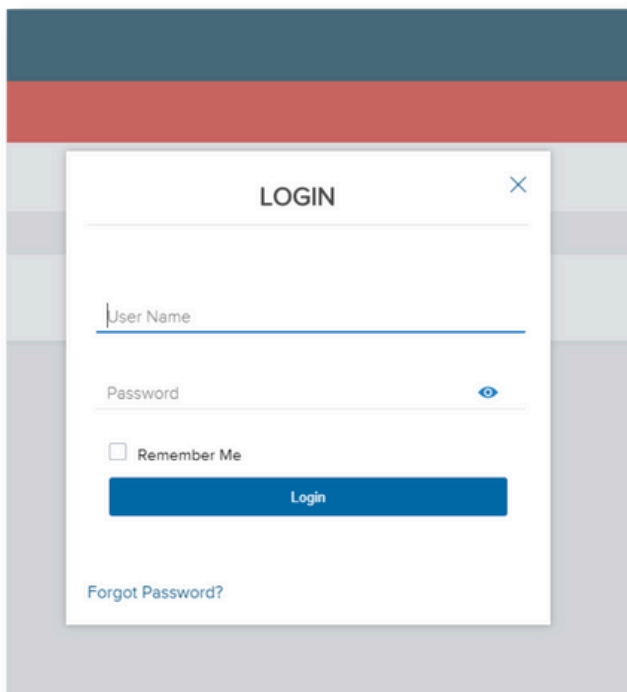


Adding & Submitting New Loans in TPO

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



- 4 Enter your credentials and click "Login"

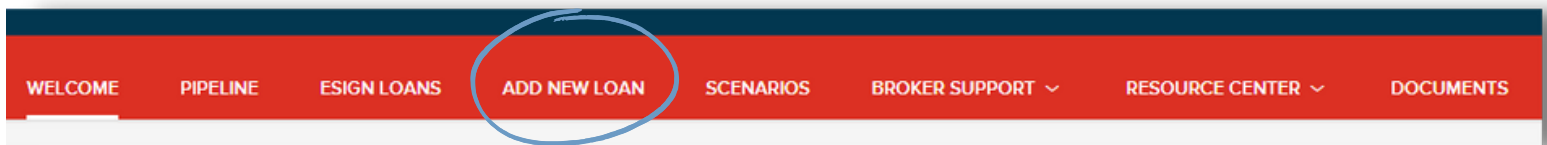


★ If you have forgotten your password, please click the "Forgot Password?" link and follow the prompts to reset it

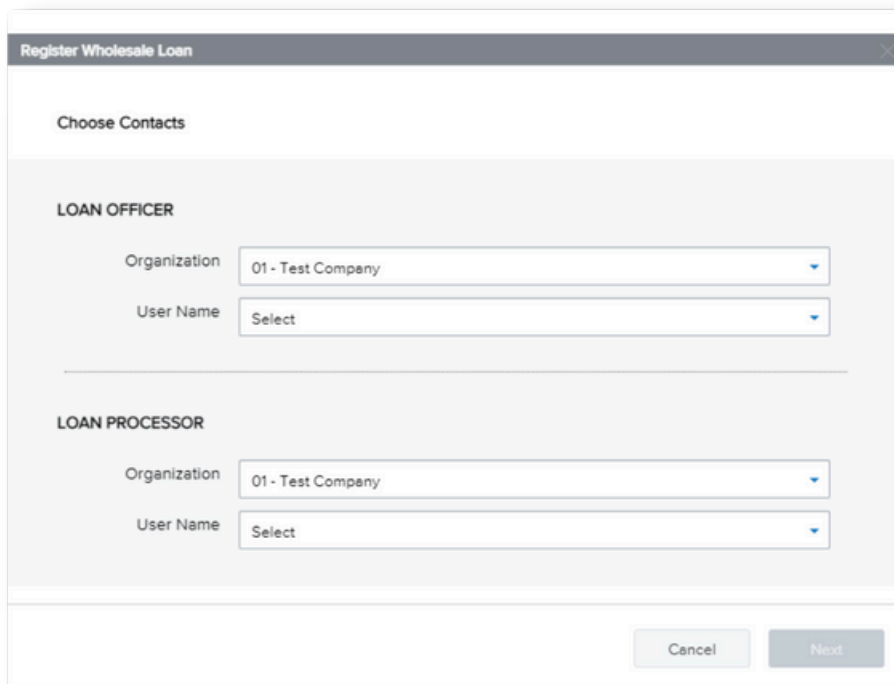


Adding & Submitting New Loans in TPO

- 5 Click on the "Add New Loan" link towards the middle of the top menu



- 6 Select Loan Officer and Loan Processor usernames and click "Next"

A screenshot of a web form titled "Register Wholesale Loan". The form has a section titled "Choose Contacts". Below this, there are two sections: "LOAN OFFICER" and "LOAN PROCESSOR". Each section contains two dropdown menus: "Organization" (both set to "01 - Test Company") and "User Name" (both set to "Select"). At the bottom right of the form, there are two buttons: "Cancel" and "Next".

Adding & Submitting New Loans in TPO

- 7 Register your loan by either uploading a ULAD /iLAD (MISMO 3.4) file or select to enter manually and click "Next"

Register Wholesale Loan

Import Loan Data From FNMA 3.2 File or ULAD / iLAD (MISMO 3.4) File

Manual

Drop Here to Upload or [Click to Browse](#)

Please Note: Downgrading a 3.4 file to a 2009 URLA or upgrading a 3.2 file to a 2020 URLA may cause lost or inaccurate data.

[Back](#) [Cancel](#) [Next](#)

- 8 Enter and confirm details as necessary and click "Register"

Additional Information

Select Borrower Pair

Agency Case No. Lender Case No.

Estimated Closing Date Loan Documentation Type

Freddie Mac Offering Identifier Freddie Mac Income Based Deed Restrictions Freddie Mac Community Land Trust Indicator HomeOne

Freddie Mac CHOICE Offering Type

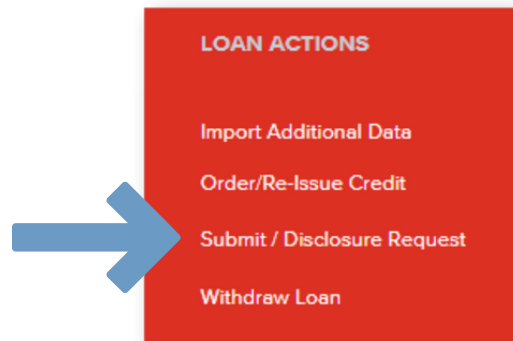
- CHOICERenovation
- CHOICERenoXpress
- CHOICERenovationMortgageWithRecourse
- CHOICERenoXpressDTSArea
- CHOICEHome
- GreenCHOICE
- GreenCHOICEToPayOffOutstandingEnergyDebt

[Register](#) [Next](#)



Adding & Submitting New Loans in TPO

- 9 Click on the "Submit / Disclosure Request" link on the bottom lefthand menu under Loan Actions (you may need to scroll down)



- 10 To proceed, you must click on the blue arrow for each section that contains missing information. A drop down will appear and you can add all the missing information there.

A dialog box titled "Required Fields" is shown. It contains a table with the following columns: FIELD ID, FIELD NAME, FORM, and FIELD. The first row has a yellow arrow pointing to the text "Not Available on Form (4)". At the bottom right of the dialog box are "Save" and "Cancel" buttons.

FIELD ID	FIELD NAME	FORM	FIELD
			Not Available on Form (4)



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FIELD ID	FIELD NAME	FORM	FIELD
Not Available on Form (4)			
FE0106	Borr Employer State	Not Available on Form	Select an Option
FE0107	Borr Employer Zip	Not Available on Form	
FE0105	Borr Employer City	Not Available on Form	
FE0160	Borrower Current/Self Employment Street Address	Not Available on Form	

11 Once completed, click save. The box will pop up again needing the initial submission package to be uploaded. Click on Local Drive and here you can upload documents either one at a time or multiple documents or you can drag and drop to the cloud with the arrow. Uploaded documents will be listed below.

Initial Submission Package	COMMENTS	Browse for files LOCAL DRIVE
DOORWAY LOAN SUB CHECKLIST.PDF	0.18 MB 08/20/2024 01:09 PM John Digiacomo	↓ ↻
FAKE INITIAL PACKAGE FOR UPLOAD.PDF	3.64 MB 08/20/2024 01:10 PM John Digiacomo	↓ ↻



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★ Once completed click "save" and then click "Confirm Submission."

The screenshot displays the 'Open MORTGAGE WHOLESALE' interface. The top navigation bar includes 'PO Contacts', 'Welcome', 'Pipeline', 'Esign Loans', 'Add New Loan', 'Scenarios', 'Broker Support', 'Resource Center', and 'Documents'. The user is logged in as 'John DiGiacomo'. The main content area is titled 'Submit / Disclosures Request' and contains a 'Submission Overview' table with the following data:

Submission Overview	Submission Status	Initial Submit / Disclosures Request Date	Last Submit / Disclosures Request Date
Application Date 02/02/2024	-	-	-

Below the overview table, there are sections for 'Borrower', 'Co-Borrower', 'Subject Property Address', 'Product & Pricing', and 'Loan Details'. The 'Borrower' section lists: First Name: LEONARD, Middle Name: M, Suffix: -, Last Name: WIGGINS, Cell Phone Number: 501-593-1946, Email Address: leonard.wiggins@omif.com, SSN: ###-##-3583. The 'Co-Borrower' section lists: First Name: -, Middle Name: -, Suffix: -, Last Name: -, Cell Phone Number: -, Email Address: -, SSN: ###-##-####. The 'Subject Property Address' section lists: Street Address: 2541 Garden Dr, City: Benton, State: AR, Zip: 72015, County: Saline. The 'Product & Pricing' section lists: Loan Program: FHLMC Conforming 30 Yr Fixed. The 'Loan Details' section lists: Loan Purpose: NoCash-Out Refinance. A yellow circle highlights the 'Confirm Submission' button in the top right corner of the main content area.

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Your loan has been submitted! Please call your Account Executive or 800-644-1258 for additional assistance





Open
MORTGAGE WHOLESAL



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