

TPO Connect Tip Sheet-Submitting Your Loan

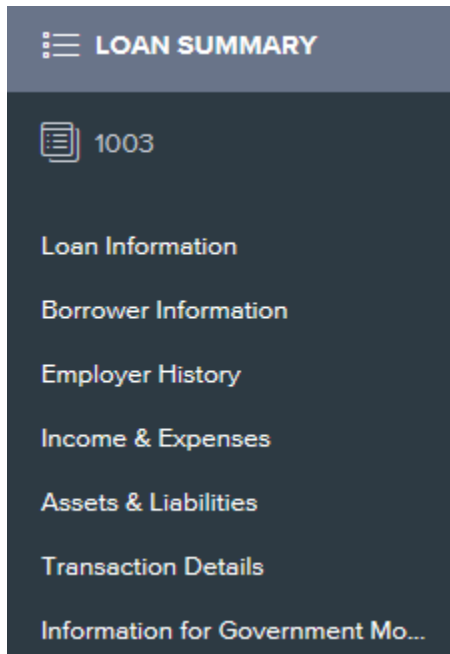
Following the steps below, in the specific order, will guarantee your success in submitting your loans through TPO Connect. We also highly suggest using Google Chrome as your browser.

https://1541724872.encompasstpoconnect.com/#/content/home_147715

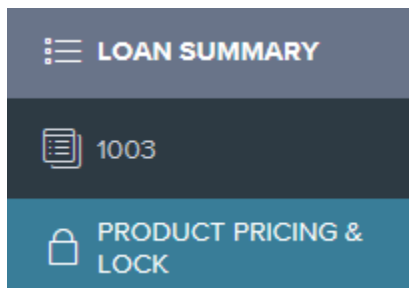
Step 1: Add a new loan by importing the 3.2 file or manually creating it. Follow the steps in the *Adding a Loan into TPO Connect* tutorial:



Step 2: Work the sections of the 1003 in the *Loan Summary* section:

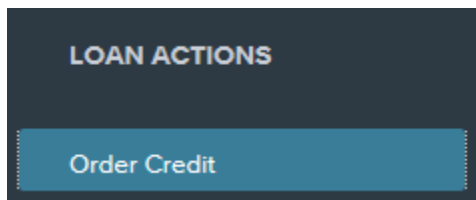


Step 3: Select the Product by selecting the *Product Pricing & Lock* option under the *Loan Summary* section. Follow the steps in the *Selecting a Product in TPO Connect* to perform function:

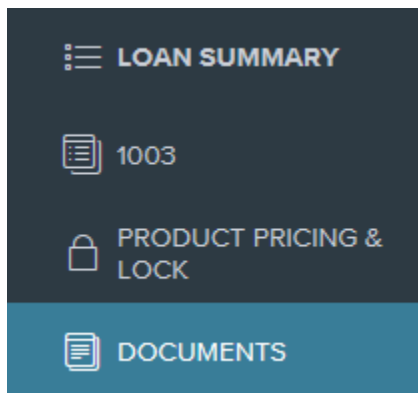


Step 4: Import your borrower's credit report into TPO Connect by selecting the *Order Credit* option in the *Loan Actions* section. Specific steps for performing this function can be found in the *Reissuing Credit in TPO Connect* tutorial:

Note: If the *Order Credit* option is not available, you likely skipped step 2.



Step 5: Upload the Borrower's personal documentation into TPO connect by selecting the *Documents* option in the *Loan Summary* section. Uploading steps are in the *Uploading Documents into TPO Connect* tutorial. The *Minimum Items to Submit to Underwriting Checklist* can be found on the *Wholesale Broker Submission Form* located on the Commerce Home Mortgage TPO website- <https://commercetpo.com/resources/>



Step 6: You are all set to submit your loan by clicking on the *Submit Loan* button under the *Loan Actions* section:

