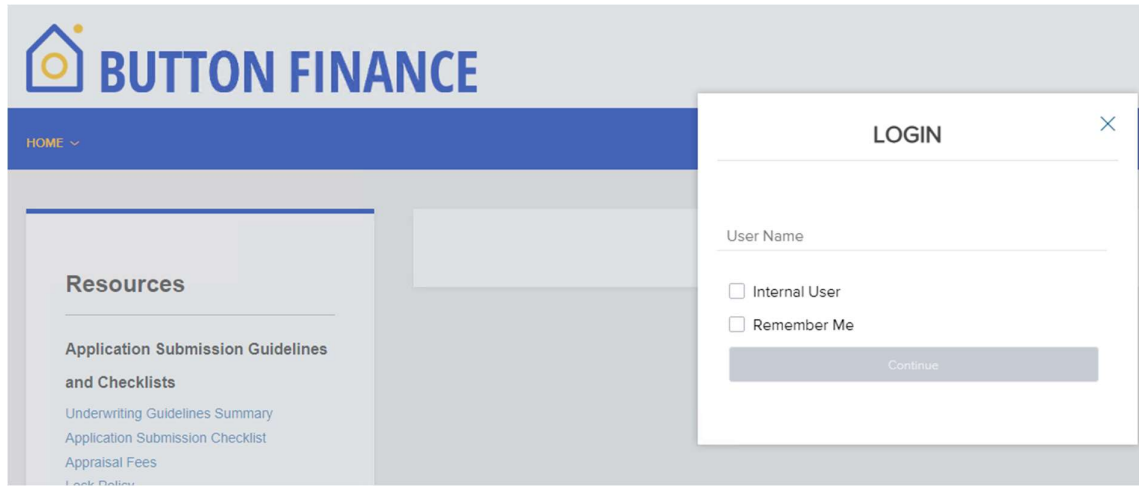




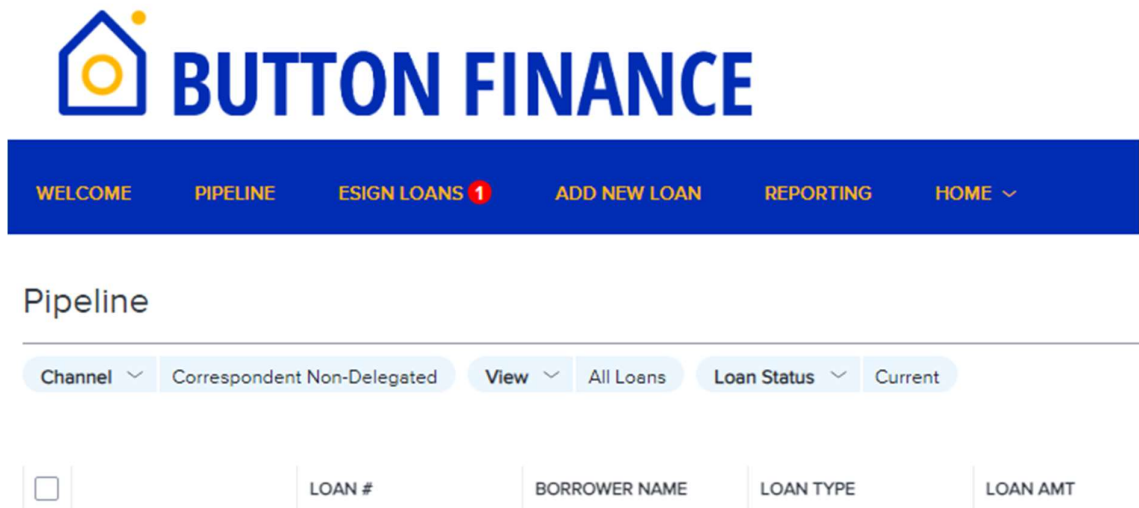
Registering and Submitting Loans

Registering a Loan

1. Login to TPO Connect with your credentials using the link below
https://buttonfinance.encompasstoconnect.com/#/content/home_395998



2. Once you login to TPO Connect, you will see your pipeline and can add new loan.



3. To register new loan, select **Add New Loan** and select your LO and LP details and click Next



Choose Contacts

LOAN OFFICER

Organization: 01 TPO Corr Test

User Name: Amit Corr Test

LOAN PROCESSOR

Organization: 01 TPO Corr Test

User Name: Amit Corr Test

Cancel Next

- 4. Upload the 3.4 file for the loan. 3.4 can be either in ULAD/iLAD (MISMO3.4) formats. Once you upload click NEXT.

Import Loan Data From 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 may cause lost or inaccurate data.

Back Cancel Next

- 5. Once you upload the 3.4 file the next step is to register the file.



WELCOME PIPELINE ESIGN LOANS ADD NEW LOAN REPORTING HOME

Loan #
DTI - Top
CLTV

Loan Purpose
Loan Type
Interest Rate

Loan Amount
FICO
APR

Activities Workflow

LOAN SUMMARY

URLA

Additional Information

Lender Loan Information

Borrower Information

Employment and Income

Assets and Liabilities

Real Estate

Loan and Property Information

Additional Information

Select Borrower Pair
John Doe

Register Next

MER's MIN

Alternate Loan Number

Estimated Closing Date
01 / 22 / 2024

Loan Documentation Type *
Select an Option
Required Field

Click the **Register** button. Fill out the information requested on the screens that pop-up. You can register the file once all the required information has been entered.

WELCOME PIPELINE ESIGN LOANS ADD NEW LOAN REPORTING HOME

Loan #
DTI - Top
CLTV

Loan Purpose
Loan Type
Interest Rate

Loan Amount
FICO
APR

Activities Workflow

LOAN SUMMARY

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Additional Information

Select Borrower Pair
John Doe

MER's MIN

Estimated Closing Date
01 / 22 / 2024

Error Details

FIELD ID	REQUIRED FIELD NAME	FORM	FIELD
MORNET.X67	Loan Documentation Type	ADDITIONAL INFORMATION	Select an Option
1041	Property Type	LENDER LOAN INFORMATION	Select an Option
VASUMM.X23	Decision FICO	LENDER LOAN INFORMATION	

Cancel Save

Note: For Community Property states like TX enter NBS details under Additional Information Screen



Activities Workflow

LOAN SUMMARY

URLA

Additional Information

Lender Loan Information

Borrower Information

Employment and Income

Assets and Liabilities

Real Estate

Loan and Property Information

Information for Government M...

BUTTON FINANCE EXTERNAL PRICING PORTAL

LOAN ESTIMATE FEE MANAGEMENT

SEND DISCLOSURES

LOAN DOCUMENTS

ESIGN

UNDERWRITING CONDITIONS

CLOSING FEES

DISCLOSURE TRACKING

LOAN ACTIONS

Additional Information

Select Borrower Pair
Soobhan C. Abato

Select an Option

HomeOne

- CHOICERenovation
- CHOICERenoExpress
- CHOICERenovationMortgageWithRecourse
- CHOICERenoExpressDTSArea
- CHOICEHome
- GreenCHOICE
- GreenCHOICEToPayOffOutstandingEnergyDebt

Save Next

Additional Fields

Broker Model RunID 70293077872	Loan Program Gold
HELOC / HELOAN HELOC	Loan Option Buyup 2
3yr Draw Option Yes	Use of Proceeds Cash Out
NBS First Name [Redacted]	NBS Last Name [Redacted]
NBS Phone Number [Redacted]	NBS Email Address [Redacted]
NBS SSN [Redacted]	



Ordering / Reissuing Credit

1. Once the Loan is registered the next step is to Order Credit / Reissue Credit.

The screenshot displays the 'LOAN ACTIONS' menu on the left, with 'Order Credit' highlighted. The main content area shows a 'Credit Provider' dropdown menu open, listing various providers such as Accurate Financial Services, ACRAAnet, and Advantage Credit Bureau. Below the dropdown, the 'Borrower Information' section is visible, showing the borrower's name (John Doe), date of birth (03/29/1955), and SSN (*** ** 4448).

2. Select the Credit Provider form the drop down then update the credentials and select **Reissue Credit**.

The 'Provider Details' form contains the following fields and options:

- User Name:
- Password:
- Save Login Information
- Branch ID:

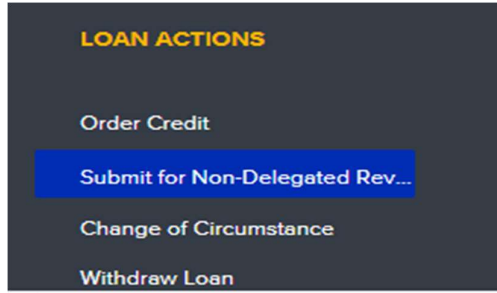


[Reissue Credit](#)



Submitting to Underwriting

1. Click **Submit** or **Submit for Non-Delegated Review** under the Loan Actions



2. Enter any missing information and upload the required documents. Please refer to our **Submission Checklist** for a list of documents required for submission.

Missing required fields and documents

Required Fields

FIELD ID	DESCRIPTION	
CUST06FV	Broker Model RunID	<input type="text"/>
CUST10FV	Use of Proceeds	<input type="text"/>
CUST12FV	Loan Option	Select One
CUST13FV	HELOC / HELOAN	Select One

Documents Missing Attachments

- Document Government-Issued Identification (Borrower) is missing an attachment
- Document CORRESPONDENT - Fee Sheet is missing an attachment
- Document Latest Mortgage Statement (subject) is missing an attachment
- Document Credit Authorization is missing an attachment

Required Documents

CREDIT AUTHORIZATION	Drag & Drop files here or Browse for files	Comments
LATEST MORTGAGE STATEMENT (SUBJECT)	Drag & Drop files here or Browse for files	Comments
GOVERNMENT-ISSUED IDENTIFICATION (BORROWER)	Drag & Drop files here or Browse for files	Comments

3. **Make sure to enter the correct Pricing RunID and select the correct Loan Option**



FIELD ID	DESCRIPTION	
CUST06FV	Broker Model RunID	<input type="text"/>
CUST10FV	Use of Proceeds	<input type="text"/>
CUST12FV	Loan Option	<div style="border: 1px solid gray; padding: 2px;"> Select One ▼ Select One Default Max Comp 3.0% Comp 2.75% Comp 2.5% Comp Up to 2.0% Comp Buyup Buyup 1 Buyup 2 Buyup 3 Buydown 1 Buydown 2 Buydown 3 </div>
CUST13FV	HELOC / HELOAN	

Documents Missing Attachments

Document Government-Issued Identification (Borrower) is missing an attachment

Document CORRESPONDENT - Fee Sheet is missing an attachment

Document Latest Mortgage Statement (subject) is missing an attachment

Document Credit Authorization is missing an attachment

4. You get the Model RunID and Loan Option from your Pricing Run

Your New 2nd Mortgage

Run ID	703110846668
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HELOAN Options

	Buyup 3	Buyup 2	Buyup 1	Default	Buydown 1	Buydown 2	Buydown 3
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HELOC Options

	Buyup 3	Buyup 2	Buyup 1	Default	Buydown 1	Buydown 2	Buydown 3
--	---------	---------	---------	---------	-----------	-----------	-----------