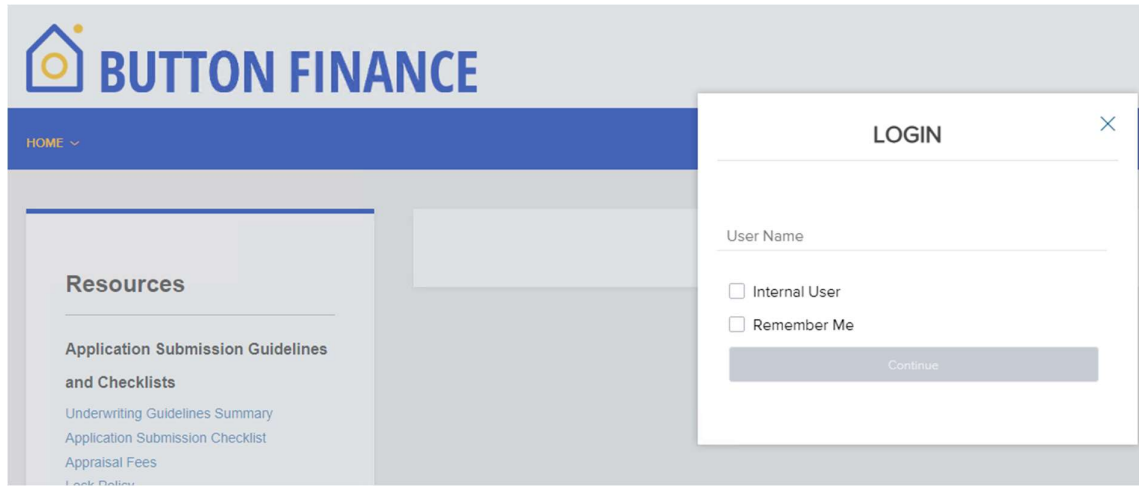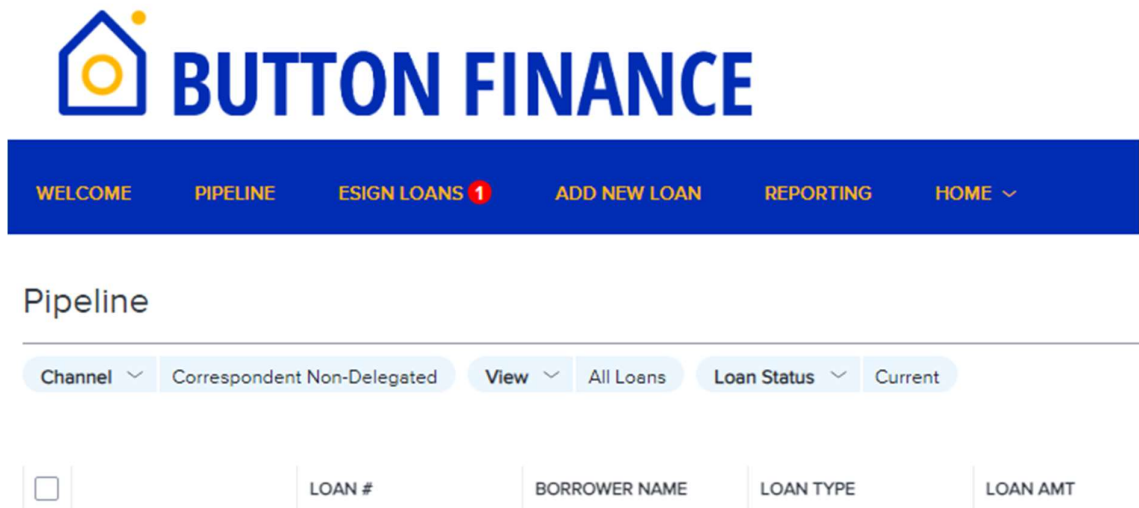**Registering and Submitting Loans**

Registering a Loan

1. Login to TPO Connect with your credentials using the link below
   https://buttonfinance.encompasstpoconnect.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.

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.

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

Additional Information

Select Borrower Pair
Siobhan C Abato

Select an Option   ☐ HomeOne

- ○ CHOICERenovation
- ○ CHOICERenoEXpress
- ○ CHOICERenovationMortgageWithRecourse
- ○ CHOICERenoExpressDTSArea
- ○ CHOICEHome
- ○ GreenCHOICE
- ○ GreenCHOICEToPayOffOutstandingEnergyDebt

Save   Next

Additional Fields

Broker Model RunID	Loan Program
702930777672	Gold
HELOC / HELOAN	Loan Option
HELOC	Buyup 3
3yr Draw Option	Use of Proceeds
Yes	Cash Out
NBS First Name	NBS Last Name
NBS Phone Number	NBS Email Address
NBS SSN	

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

Ordering / Reissuing Credit

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

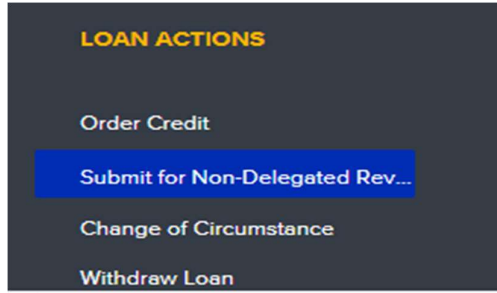2. Select the Credit Provider form the drop down then update the credentials and select **Reissue Credit**.

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.

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

FIELD ID	DESCRIPTION	
CUST06FV	Broker Model RunID	
CUST10FV	Use of Proceeds	
CUST12FV	Loan Option	Select One ▾
CUST13FV	HELOC / HELOAN	

Loan Option dropdown:
- 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

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

HELOAN Options

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

HELOC Options

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