Section

1

Getting Started

Getting Started

This section explains how you can start using the website and includes a brief description of the main tools available on the website. Enough information is provided to get you started, but more steps are required to complete these processes. These tools are discussed in detail later in this guide.

Gaining Initial Access to the Website

Once approved by our company, we will assign a manager from your company to be the website administrator (i.e., the one who will manage user accounts, update company information, and add new users). The manager will receive an email from us that provides a link to the website, along with a log in name (the manager's email address) and a temporary password. The manager will then complete the following steps to gain access to the website.
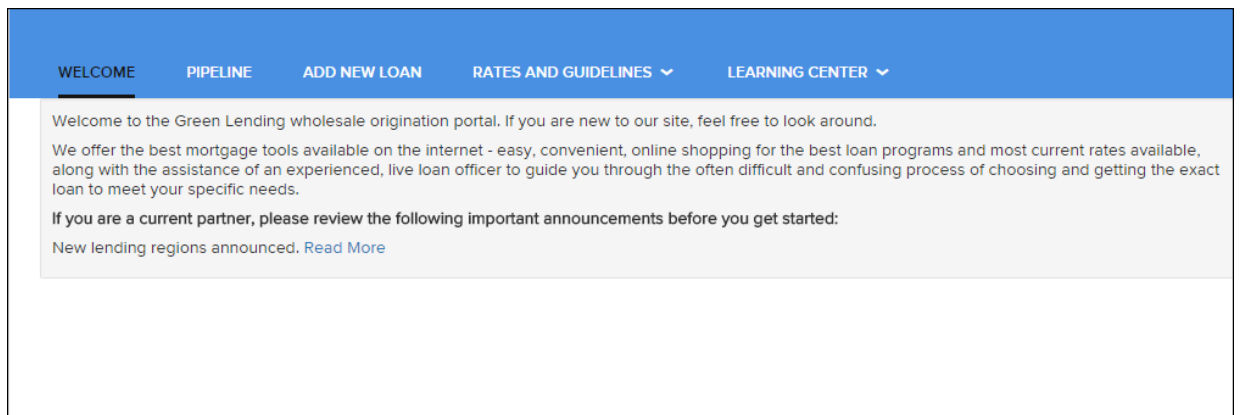
To Gain Initial Access to the Website:

1   Click the link provided in the email to open the website.

2   Log in to the website using your email address and the temporary password provided in the email.

3   On the Change Password page, create a new password.

NOTE: Be sure to keep track of your new password. Our company will not have access to it.

Start Using the Website Tools

Once logged in, the manager can grant users access to the site and update their account information.

WELCOME   PIPELINE   ADD NEW LOAN   RATES AND GUIDELINES ⌄   LEARNING CENTER ⌄

Welcome to the Green Lending wholesale origination portal. If you are new to our site, feel free to look around.

We offer the best mortgage tools available on the internet - easy, convenient, online shopping for the best loan programs and most current rates available, along with the assistance of an experienced, live loan officer to guide you through the often difficult and confusing process of choosing and getting the exact loan to meet your specific needs.

If you are a current partner, please review the following important announcements before you get started:
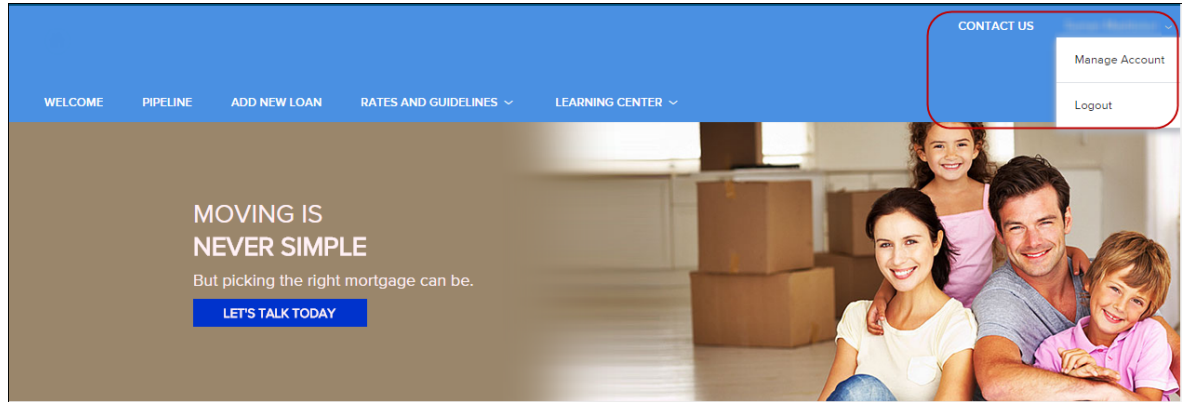
New lending regions announced. Read More

Add Users to the Website

In order for other users to gain access to the website, the manager must create a contact record for each user.

To Create a Contact Record:

1 Click your user name in the top right corner, and then select **Manage Account**.

2 Click the **Company Account** tab.

3 Scroll to the Company Contacts section, and then click **Add Contact** to add a new user who will be able to use the website.
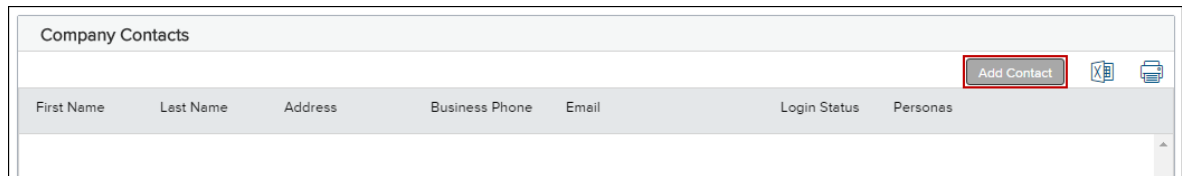
4 Enter the required information for the user. (Required fields are marked with a red asterisk.*****)

- The Organization field enables you to select the branch within the TPO Company's organization where this contact should be created. Click **Choose** to select the organization option, and then select the organization entry and click **Save**.

- The Persona field enables you to select an available persona to assign to the TPO Contact. Click **Add Persona** to select the persona for the TPO contact, and then select one or more personas and click **Save**.

5 When finished, click the **Save** button.

The user will receive an email that provides a link to the website, along with a log in name (their email address) and a temporary password. The user can log in to the website, however their licensing information needs to be submitted to, and then approved by, our company before they can submit loan files. (This rule applies to branches that will use the website as well.)

Submit user or branch licensing information to:

Add contact information for licensing information reviewer(s)

View the Pipeline

Click the **Pipeline** link on the Welcome page to view your pipeline of loans. As you create new loans, they will be listed in the Pipeline. Here you can check loan status, lock status, and some basic loan information. Depending on your assigned role and permissions, you may be able to view all the loans that your team has entered in TPO Connect.

To Customize Your Pipeline View:

1. From the Pipeline page, Click **All Loans** to view all loans that you have access to view or click **My Loans** to view only the loans you have originated.

2. Click **Current** to view loans in the Current Pipeline or click **Archived** to view loans in the Archived Pipeline

3. Click **Wholesale** to view wholesale loans

4. Click **Correspondent** to view correspondent loans.

To Filter Your Pipeline View:

1   From the Pipeline page, Click **Advanced Filter.**

2   Choose one or more filters to apply to your pipeline view, and then click **Apply Filters**.

3   To clear any applied filters, click **Clear Filters**.

Start a New Loan

There are two ways to originate a loan in TPO Connect: Importing a Fannie Mae DU 3.2 file or by manually filling out an online 1003. Again, this section provides the steps to get you started, but refer to Chapter 2, Originating Loans for the complete process.

1   Click the **Add New Loan** button on the TPO Connect home page to start a new loan.

2   In the pop-up window, select the loan officer(s) and loan processor(s) the loan will be assigned to.

3 Click **Next**.

4 Using the pop-window, you can upload a DU 3.2 file (*.fnm) or enter the loan data manually in a 1003 form.

- To import an FNM file, select the import option, click **Browse Files**, and then select the file.

 OR

- Select **Manually enter loan data**.

5 Click **Next**.

6 If you imported a file, the 1003 form is displayed with the loan data.

 If you are manually entering the loan data, the 1003 form is displayed and you can being entering data.

7 When you are ready to save the loan, click **Register**.

NOTE: All of these items are discussed in detail later in this guide.