

WG. WESTGEN LENDING

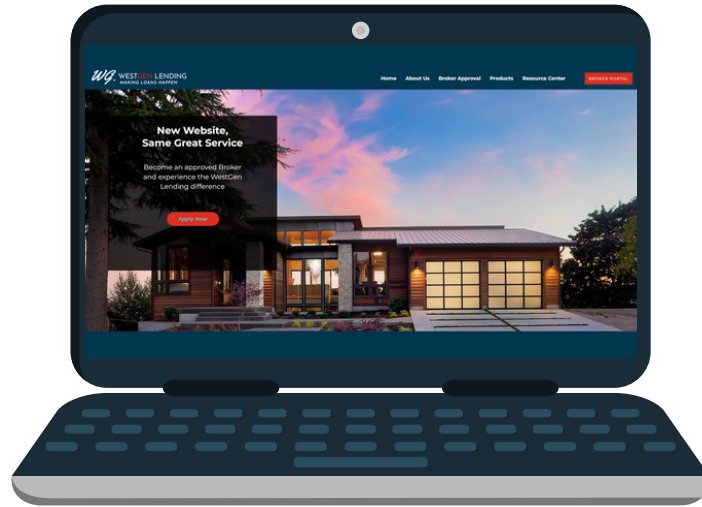
USER GUIDE

Uploading Conditions in TPO

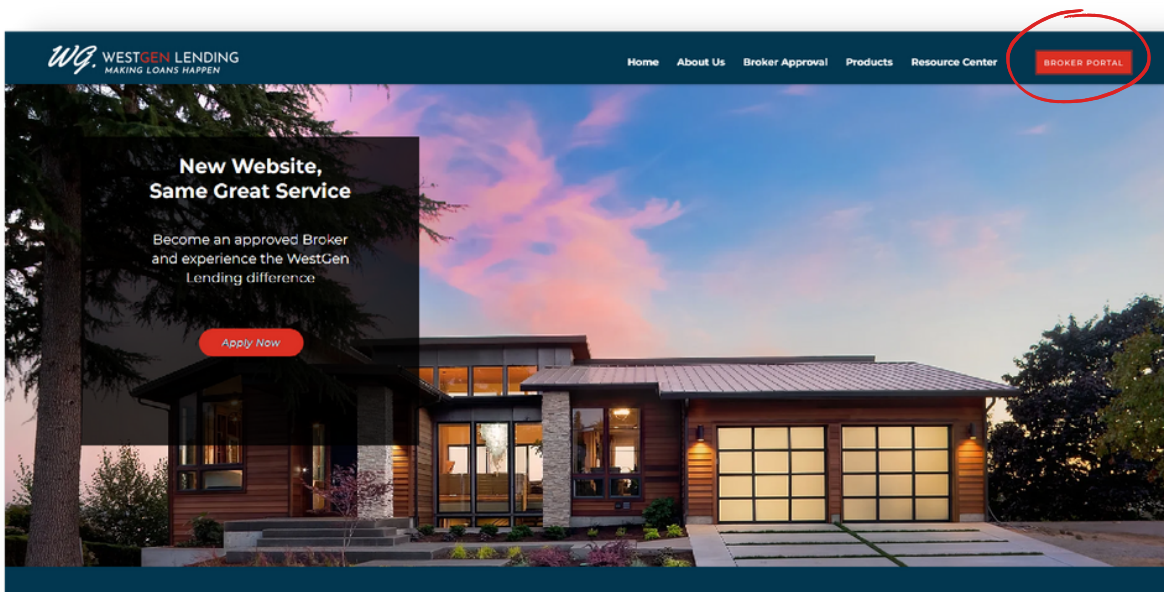
Last Updated 8/21/2023

Uploading Conditions in TPO

1 Visit WestGenLending.com

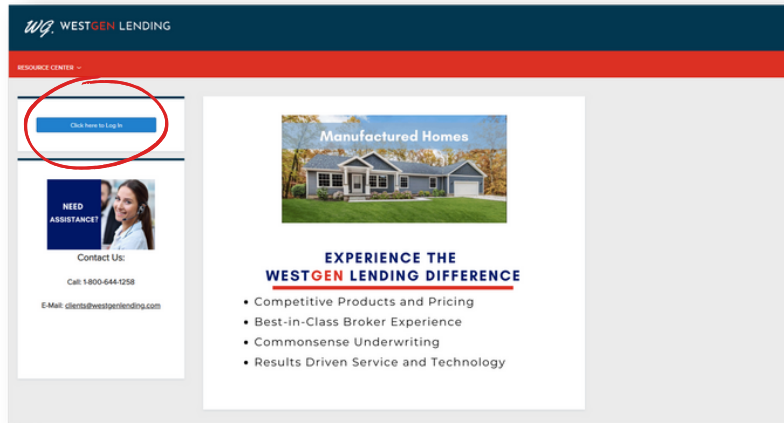


2 Click on the “[Broker Portal](#)” button on the top right side of the page

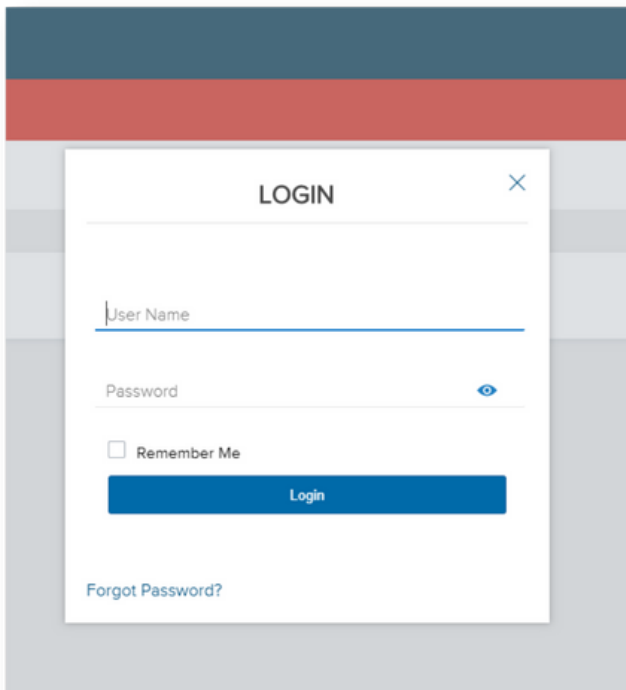


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3 Click on the button on the left side of the page to log in



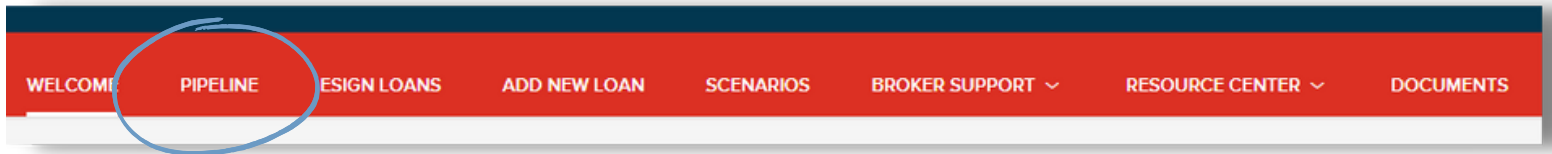
4 Enter your credentials and click "Login"

A screenshot of a login form titled 'LOGIN'. It features a 'User Name' input field, a 'Password' input field with an eye icon for visibility, and a 'Remember Me' checkbox. A blue 'Login' button is positioned below the password field. At the bottom left of the form, there is a link for 'Forgot Password?'. The form is set against a light gray background with a red and blue header.




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


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- 5 Click on the “Pipeline” link towards the left side of the top menu



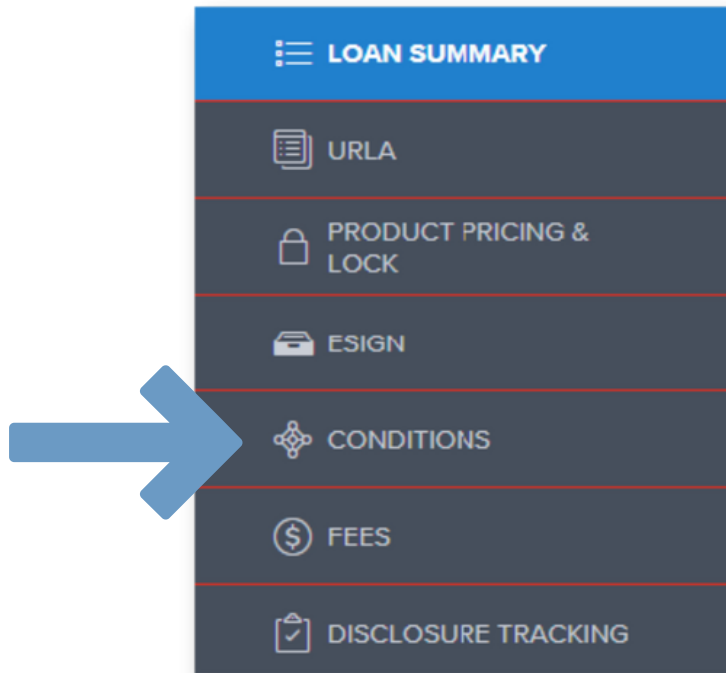
- 6 Find the loan you are submitting conditions for and click on it to open the file

<input type="checkbox"/>		Name / Loan # / Property Address	
<input type="checkbox"/>		Borrower #1 Address #1	#10002010004300
<input type="checkbox"/>		Borrower #2 Address #2	#10002010004339
<input type="checkbox"/>		Borrower #3 Address #3	#TEST2005000083



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- 7 Click on "Conditions" on the left hand menu



- 8 Find each condition you're uploading documents for, using the filters as needed

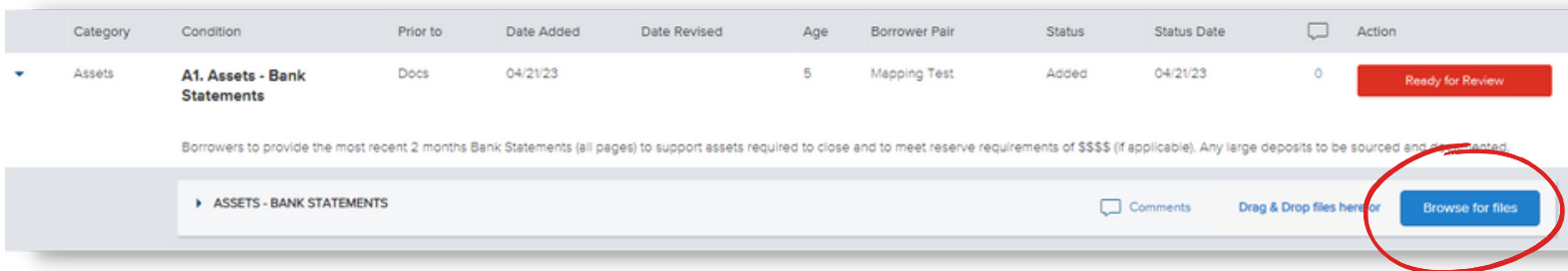
Max attachment size is 200 MB. View Supported Files.

Category	Condition	Prior to	Date Added	Date Revised	Age	Borrower Pair	Status	Status Date	Action
Assets	A1. Assets - Bank Statements	Docs	04/21/23		5	Mapping Test	Added	04/21/23	Ready for Review

growers to provide the most recent 2 months Bank Statements (all pages) to support assets required to close and to meet reserve requirements of \$\$\$\$ (if applicable). Any large deposits to be sourced and documented.

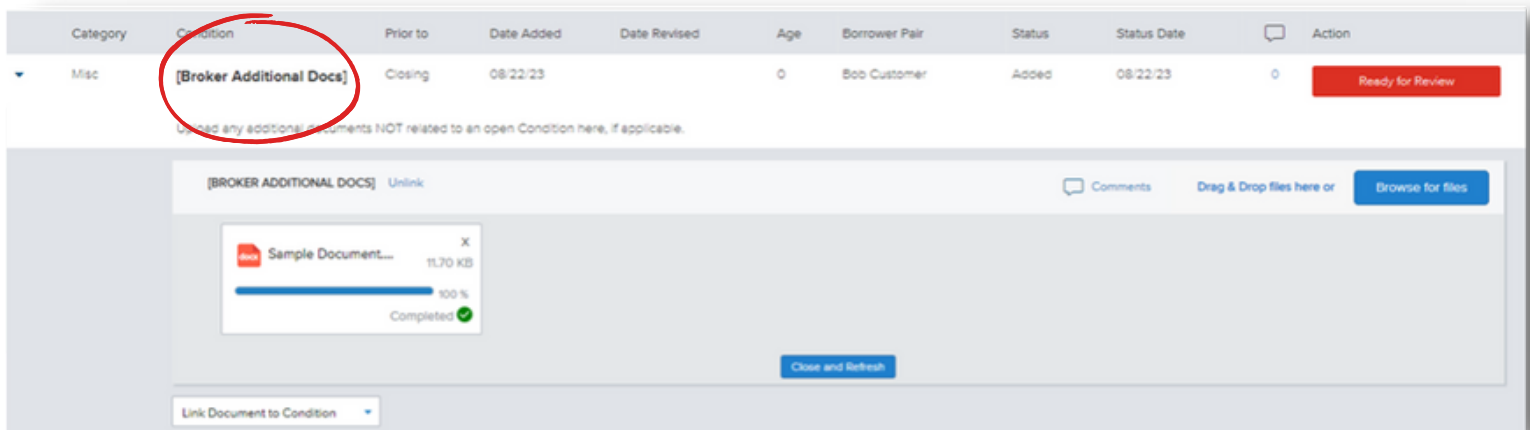
Uploading Conditions in TPO

- 9 Upload documents by either dragging and dropping or clicking the “Browse for files” button and uploading from your device



- ★ Note that the max document size is 200MB and supported file types include doc, docx, html, jpg, jpe, jpeg, pdf, png, tif, tiff, and txt

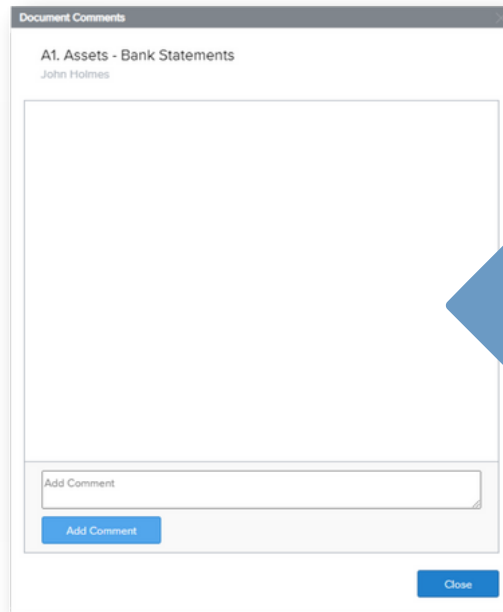
- 10 Utilize the [Broker Additional Docs] condition to upload any documents that do not pertain to an existing condition



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Add any comments per condition as necessary



The screenshot shows a 'Document Comments' dialog box. At the top, it says 'A1. Assets - Bank Statements' and 'John Holmes'. Below this is a large empty text area for comments. At the bottom of the dialog, there is a text input field labeled 'Add Comment', a blue 'Add Comment' button, and a blue 'Close' button. A large blue arrow points from the right towards the comment area.

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Once document has been uploaded, click "Ready for Review." This button notifies the Underwriting team that the condition is ready for review

Category	Condition	Prior to	Date Added	Date Revised	Age	Borrower Pair	Status	Status Date	Comments	Action
Assets	A1. Assets - Bank Statements	Docs	04/21/23		5	Mapping Test	Added	04/21/23	0	Ready for Review

Borrowers to provide the most recent 2 months Bank Statements (all pages) to support assets required to close and to meet reserve requirements of \$\$\$\$ (if applicable). Any large deposits to be sourced and documented.

ASSETS - BANK STATEMENTS

Test File.docx 11 KB 04/21/2023 3:57 PM Brittney Bui

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Once the "Ready for Review" button is clicked, the Condition Status will show *Fulfilled*. If you need to add additional documents, click "Re-Open," add documents, then click "Ready for Review" again

Category	Condition	Prior to	Date Added	Date Revised	Age	Borrower Pair	Status	Status Date	Comments	Action
Assets	A1. Assets - Bank Statements	Docs	04/21/23		5	Mapping Test	Fulfilled	04/26/23	0	Re-Open

Borrowers to provide the most recent 2 months Bank Statements (all pages) to support assets required to close and to meet reserve requirements of \$\$\$\$ (if applicable). Any large deposits to be sourced and documented.

ASSETS - BANK STATEMENTS

Test File.docx 11 KB 04/21/2023 3:57 PM Brittney Bul

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Your conditions have been uploaded! Please call your Account Executive or 800-644-1258 for additional assistance





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