

To start a new file:

- Select "New Loan" on the Welcome screen
- Upload from "DU 3.2 File (\*.fnm)"
- Assure the Loan Officer selections are made

### New Loan


Select an upload method to get started.

**Upload from...**

DU 3.2 File (\*.fnm)  
 Create Manually

Loan Officer: Corporate  MMC Loan Officer

Loan Processor: Corporate  Lori Processor



Complete "DU Import Loan" by selecting Browse....find your saved DU 3.2 File:

Welcome Page > Pipeline > DU Import Loan

### DU Import Loan

Test TPO.fnm



In the Loan Details, complete all required fields (1003), using the "Next" button to scroll through all screens for any necessary revisions. Here are all of the tabs needing review:



Loan Information   Borrower Information   **Employment History**   Income & Expenses   Assets & Liabilities   Transaction Details   Declaration & Gov. Monitoring   Comments

Look for the message that "The Current loan has been saved":



- Loan Information
- Borrower Information
- Employment History
- Income & Expenses
- Assets & Liabilities
- Transaction Details
- Declaration & Gov. Monitoring
- Comments

Once saved, click the Conditions & Documents Tab to upload the required documents listed below for submission of the loan:

- \*Broker – Disclosures (LE and other exhibits used to disclose to the borrower)
- \*Broker – Submission Package (Broker credit report and all other documentation used to decision the loan)

Note: The system will not accept your submission without upload of exhibits to the two document place holders show above.

Loan Summary | 1003 | Conditions & Documents

Conditions

Search By: Prior To | <All> | Search | Clear

0-0 of 0

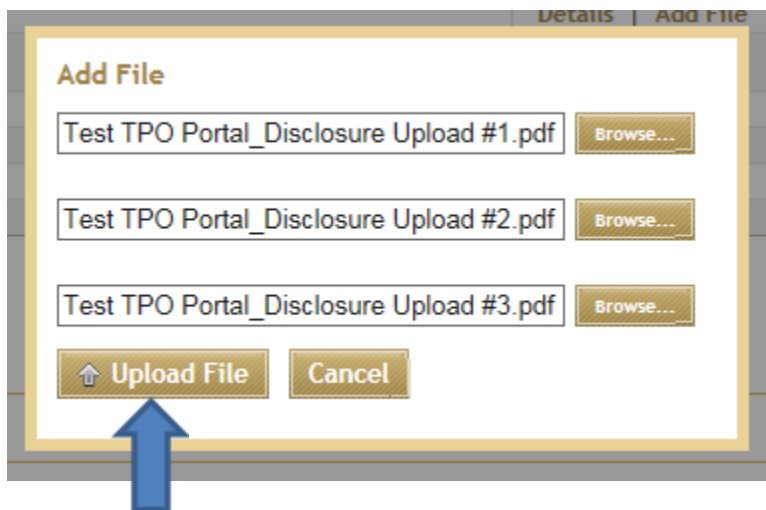
Prior To	Condition Name	Date Added	Status	Status Date	Supporting Documents
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Documents

1-6 of 6

Document Name	File Name	Details	Add File
* Broker - Disclosures		Details	Add File
* Broker - Requests (Case Number, Appraisal, COC, Misc)		Details	Add File
* Broker - Submission Package		Details	Add File

Upload documents by selecting "Add File". This will allow up to three attachments. Once complete select "Upload File":



Results in a File uploaded successfully message and view of the documents provided for that place holder below:

Loan Summary    1003    Conditions & Documents

✔ File uploaded successfully. The loan has not been submitted.

Documents

1-6 of 6    Print Fax Coversheet

Document Name ▲	File Name	
* Broker - Disclosures	Test TPO Portal_Disclosure Upload #1.pdf , Test TPO Portal_Disclosure Upload #2.pdf , Test TPO Portal_Disclosure Upload #3.pdf	Details   Add File

Trying to submit without the "Required Documents" results in an error message and a hard stop from submission. You can see below that there are no files provide for the \*Broker – Submission Package:

Required Documents

Document Name ▲	File Name	
* Broker - Disclosures	Test TPO Portal_Disclosure Upload #1.pdf , Test TPO Portal_Disclosure Upload #2.pdf , Test TPO Portal_Disclosure Upload #3.pdf	Details   Add File
* Broker - Submission Package		Details   Add File

\* = Required

Submit Loan    Cancel

Welcome Page > Pipeline > Loan Details > Submit Loan

Submit Loan

You did not upload all the required documents. ←

Once you upload all of the Required Documents, you will receive a message that the file uploaded successfully but has not been submitted:

Required Documents

Document Name ▲	File Name	
* Broker - Disclosures	Test TPO Portal_Disclosure Upload #1.pdf , Test TPO Portal_Disclosure Upload #2.pdf , Test TPO Portal_Disclosure Upload #3.pdf	
* Broker - Submission Package	Test TPO Portal_Complete Submission Package.pdf	

Submit Loan

✔ File uploaded successfully. The loan has not been submitted. ←

Once you have completed all of the steps, select "Submit Loan" (under Loan Actions on left side of page). Fill in any missing information, then click: "Submit Loan" button on bottom of page. You will receive a message confirming that the loan has been submitted:

**Required Documents**

Document Name ▲	File Name
* Broker - Disclosures	Test TPO Portal_Disclosure Upload #1.pdf , Test TPO Portal_Disclosure Upload #2.pdf , Test TPO Portal_Disclosure Upload #3.pdf
* Broker - Submission Package	Test TPO Portal_Complete Submission Package.pdf

\* = Required

Loan Summary | **1003** | Conditions & Documents

✓ The loan has been submitted.

To add supplemental or follow up documents to the loan, please follow these steps:

- Find the loan in your pipeline
- Select the View/Edit to access the loan

<input type="checkbox"/>	TPO Portal, Test 37029 Julian Lane Palmdale, CA 93552	L16116164 \$276,955.00	11/15/2016	Started				View/Edit
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In the Conditions & Documents Tab, you will see the document options for upload (please note that the \*Broker choices are the only selections that should be made for upload (the 0005 & 0009 options will be removed with more work from our tech side). Select "Add File" next to the appropriate Document Name OR you may select the add new document icon to make a drop down selection:

Details | Add File  
Details | Add File  
Details | Add File

Welcome Page > Pipeline > Loan Details > New Document Details

## New Document Details

\* Document Name:

- \* Broker - Conditions to be Reviewed
- \* Broker - Disclosures
- \* Broker - Requests (Case Number, Appraisal, COC, Misc)
- \* Broker - Submission Package
- 0005\_\_Escrow & Title Documentation
- 0009\_\_File Notes & Documents

\* For Borrower:

Document sent via fax:

\* Attached Files:

0005 & 0009 are being removed – do not use these

Previous Comments:

^  
v

New Comments:

^

See next page...

Select Document Name, Browse for attachments and Save for document upload. Here is an example of upload for \*Broker - Conditions to be Reviewed:

### New Document Details

\* Document Name:

\* For Borrower:

Document sent via fax:

\* Attached Files:

Previous Comments:

New Comments:



[Loan Summary](#) | [1003](#) | [Conditions & Documents](#)

✔ Document Details have been added.

### Documents

Document Name	File Name	
* Broker - Conditions to be Reviewed	Test TPO Portal_Conditions Review.pdf	Details   Add File

After the successful upload of documentation the following message is sent to the applicable parties at MMC:

*Encompass WebCenter Notification*

This message is to inform you that Lori Processor has uploaded a document(s) for review using your Encompass WebCenter website.

Loan Number: **L16116164**

Document or Condition Folder: \* **Broker - Conditions to be Reviewed**

Attachment Name: **Test TPO Portal\_Conditions Review.pdf**

Date: **11/15/2016 at 8:27 AM Pacific Standard Time**

Encompass WebCenter site: <https://mmcwholesale.secure-onlineorigination.com>

Primary Borrower Name: **TPO Portal, Test**

Primary Borrower Email:

This loan is now available for review in Encompass.

Should you have any questions or require assistance, please have your Admin contact Customer Support. We're available to answer your calls Monday - Friday, from 6:00 AM to 5:00 PM Pacific Time.

Thank you,  
The Ellie Mae Team

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If you have questions, comments or suggestions, contact your MMC Wholesale Representative.

Thank you for your business!