



**Submit to lender**

i.e. Initial submission to underwriting

- From **Pipeline> summary** select the Loan Actions menu button and **Upload Documents**

322263 - [REDACTED]

**BORROWER**

[REDACTED]

Pipeline Summary  
Loan Snapshot  
Loan History  
Loan Info  
Loan Contacts  
Edit 1003  
Edit Fees Worksheet  
Request Documents  
Edit TIL  
Edit 1008  
Price / Lock  
Fee Sheet  
HMDA  
Update Loan  
Export Loan  
Cancel Loan  
Processing  
Submit to Processor  
**Upload Documents**  
Send DocLink Request  
View Closing

Order Credit  
Submit to Lender  
Closing Request  
Order Appraisal  
Merge Liabilities  
Fraud Filter  
Flood Certification  
Submit To Doc Provider  
Compliance  
Early Check  
Services

Continued on next page>>>

- **Select Files** or you can Drag and Drop PDFs anywhere on the screen.
  - Leave the **Type** field as **“Submission Package”** for all files.
  - Leave the **Folder** field as **“Uploads”** for all files.
  - Select **Save Files** at the bottom of the page.

Upload Documents

REMINDER: If you have already submitted your loan, be sure to perform the loan action Update Lender, after uploading your documents

Select File(s) to Upload (50MB File Limit)

Select Files

5 - Disclosures.pdf x Remove

Type: Submission Package Description: 5 - Disclosures Folder: Uploads

Note:

Attach to Condition

Bank Statements.pdf x Remove

Type: Submission Package Description: Bank Statements Folder: Uploads

Note:

Attach to Condition

Pay Stubs.pdf x Remove

Type: Submission Package Description: Pay Stubs Folder: Uploads

Note:

Attach to Condition

Drag and drop files into the space above to add.

Save Files

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- Please **DO NOT** use the NOTES section above as the underwriters cannot see this field. Instead, please upload a processor or LO certification.

Continue on next page>>>

- From **Pipeline> summary** select the Loan Actions menu button and **Submit to Lender**

The screenshot displays a software interface with a navigation menu on the left and a dropdown menu for 'BORROWER' on the right. The navigation menu includes sections like 'Add a Loan', 'Software Center', 'Origination Tools', 'Pipeline', 'InfoCenter', and 'Administration'. The 'Pipeline' section is expanded, showing options like 'summary', 'management', 'queue', 'reporting', 'processing report', and 'search'. The 'BORROWER' dropdown menu is open, listing various actions such as 'Pipeline Summary', 'Loan Snapshot', 'Loan History', 'Loan Info', 'Loan Contacts', 'Edit 1003', 'Edit Fees Worksheet', 'Request Documents', 'Edit TIL', 'Edit 1008', 'Price / Lock', 'Fee Sheet', 'HMDA', 'Update Loan', 'Export Loan', 'Cancel Loan', 'Processing', 'Submit to Processor', 'Upload Documents', 'Send DocLink Request', 'View Closing', 'Order Credit', 'Submit to Lender', 'Closing Request', 'Order Appraisal', 'Merge Liabilities', 'Fraud Filter', 'Flood Certification', 'Submit To Doc Provider', 'Compliance', 'Early Check', and 'Services'. The 'Submit to Lender' option is highlighted in yellow.

Continue on next page>>>

- Scroll down and select **Send Loan** at the bottom of the page

1 Select documents to send

**Document**

- Doc Magic Disclosure Response
- Doc Magic Disclosure PDF
- Doc Magic Audit Results
- Doc Magic Proof Sheet
- Doc Magic APR/Payment Schedule
- Doc Magic GFE Comparison
- Doc Magic Check
- 1003 Loan Application
- Loan Contacts
- Doc Magic Audit Response
- Fees Worksheet
- Estimated Fees
- Underwriting Decision
- Truth-in-Lending Disclosure Statement
- Pre-App Closing Cost Estimate
- Funding Worksheet
- DU
- Loan DU Response Document
- Credit Response Text
- Loan DU Response PDF
- 1008 - URLA 2020
- Registration/Lock Request
- Product and Pricing Pricing Document
- Product Pricing History
- Product and Pricing Document
- Custom Fields
- Loan Conditions
- Amort Schedule

2 Enter comments to send along with the documents

The parent linked loan must be submitted by going to that loan directly.

**Send Loan** [\(View Lender Information\)](#)

**Thank you for submitting your loan**