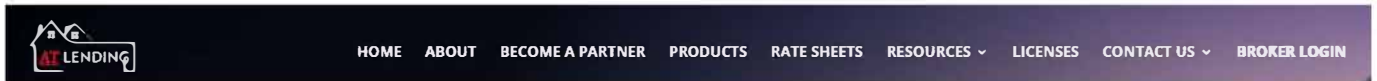




## TBD Submission Guide

1. Visit our website at [www.atlending.com](http://www.atlending.com) and login to the broker portal.



2. To log in, enter your username and password. If you forget your username or password, please click "Forgot password" or reach out to your Account Executive for assistance.

Login  [Forgot login?](#)  
 Password  [Forgot password?](#)

©2022 PriceMyLoan, All Rights Reserved.

3. To start a new loan, click on the Create New Loan link.
4. A new drop down will open, typically you will want to click on the Import loan file as you will be using an existing 3.4 file to create your new loan. *Please do not use the Create purchase loan or Create refinance loan links unless you would like to enter the full application on our website.*

Welcome, Michael Caver

Portal: Broker

Current Traditional Rate Sheet

Current NQM Rate Sheet

Broker Pipelines

Loans

Tasks

Conditions

[0101] Loan Officer All Status Pipeline

Configure Pipelines

QuickPricer

**Create New Loan**

- Import Loan File
- Create Purchase Loan
- Create Refinance Loan
- Create 2nd Lien (Standalone)

My Profile

Manage Portal

Loans

Search

Loan Number Last Name SSN (Last 4) Email Address Phone Number Status Date

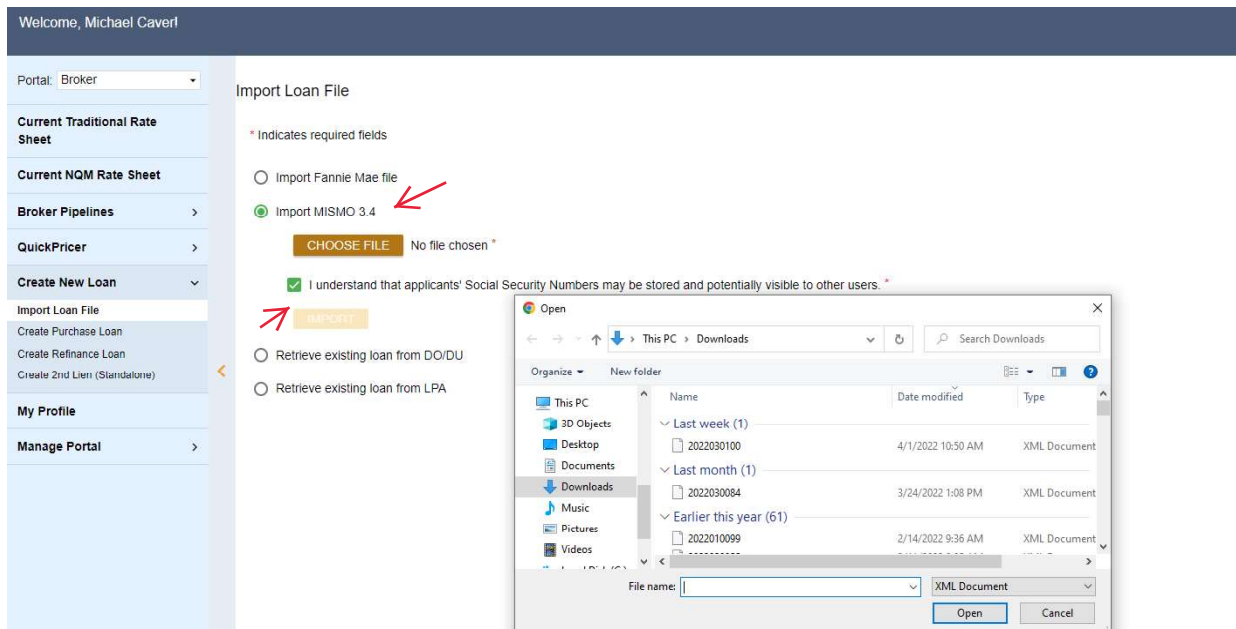
Criteria Loan Status

<-Any-->

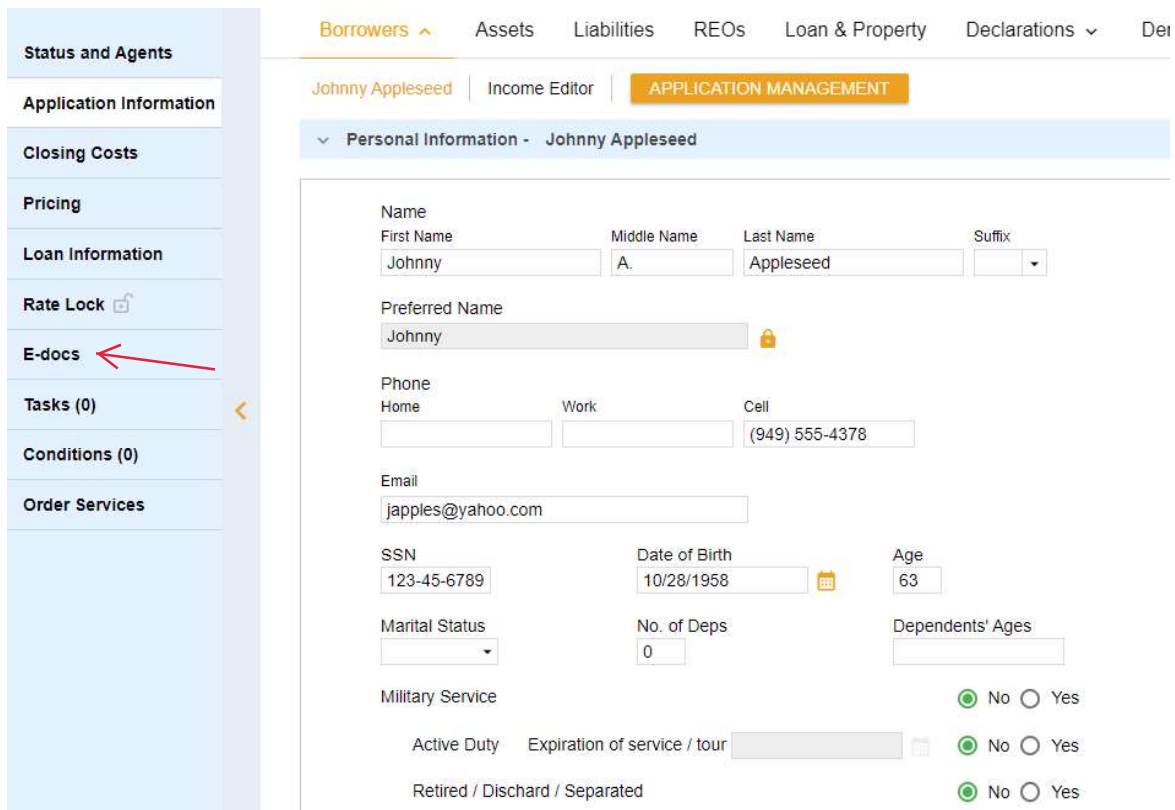
Display most recent 25 loans assigned to anyone

Loan Number	Conditions	Tasks	Last Name, First Name	Loan Amt	Loan Status / Status Date	Lock Status / Lock Exp. Date	Loan Officer / Processor
2022030054	0 Condition	0 Task	Abdelhour, Shady	\$511,450	Loan Open 3/16/2022		LO Mark Gaid
2021100045	0 Condition	0 Task	Menez, Bernard	\$440,000	Loan Canceled 10/18/2021		LO Tracy Lal P Tracy Lal

- Click Browse to search for your previously saved 3.4 file on your local computer.
- This will open a new window. Please navigate to the folder where you have previously saved the 3.4 file and select that file then click the Open button.
- Click the "I understand ..." box and then click Import.




- After your loan has been uploaded. Please click on the E-docs tab to begin uploading your submission package.



Pipeline | 
 Loan Number: 2022040008 | 
 Borrower Name: Johnny A. Appleseed | 
 Loan Amount: \$550,000.00 | 
 DTI: 55.000% | 
 LTV: 55.000% | 
 CLTV: 55.000% | 
 HCLTV: 55.000% | 
 Property Address: 3 Viceroy, Irvine, CA 92604 | 
 Loan Type: Conventional | 
 Credit Score: 0 | 
 SAVE

**Status and Agents**  
**Application Information**  
 Advantage Credit - Settlement Services Worksheet (SSW) | Credit Plus - Settlement Services Worksheet (SSW) | View Application Information  
**Closing Costs**  
**Pricing**  
Upload Docs | Fax Docs | Document List  
**Loan Information**  
 You may upload up to 12 documents at a time with a total upload size of 100MB.  
**E-docs**  
**Tasks (0)**  
**Conditions (0)**  
**Order Services**

Files to Upload

  
**Drag and Drop Files Here to Upload**  
OR SELECT FILES TO UPLOAD  
 0 of 12 files selected for upload

you can drag and drop files or click on the button to upload.

File Name	Doc Type *	Description	Internal Comments	Selected Application
Waiting for files...				

9. Click on the select Doc Type hyperlink to open a new window to identify which type of document you are uploading. The following documents are needed to submit a TBD: Credit Report, Borrower's Authorization, and necessary income documentation.

File Name	Doc Type *	Description	Internal Comments	Selected Application
AT-Lending-Traditional-Loan-Submission-Form-1 (1).pdf	[ <a href="#">select Doc Type</a> ] scan barcodes	<input type="text"/>	<input type="text"/>	Johnny A. Appleseed
		0 of 200 characters	0 of 200 characters	

**Select a Doc Type** ✕


Search for:  SEARCH

Matching Doc Types:

Doc Type	Folder
INITIAL SUBMISSION PACKAGE	* NEW FILE UPLOAD*

10. Once you have added all the documents for the file click on "Upload Docs". A message will appear that your files have been uploaded. From here you can view the uploaded documents or proceed back to your pipeline so that you can submit your loan.

Display most recent 25 - loans assigned to anyone -

Loan Number	Conditions	Tasks	Last Name, First Name	Loan Amt	Loan Status / Status Date	Lock Status / Lock Exp. Date	Loan Officer / Processor
 2022040008	0 Condition	0 Task	Appleseed, Johnny	\$550,000	Loan Open 4/4/2022		LO Michael Caver P Michael Caver

11. When you return to your pipeline view, you will note that the loan is now in "Loan Open" status. This will indicate that it has been added into our Set Up Departments queue and is in line to be processed to go to Underwriting for Pre-Approval.

If you have any questions, please reach out to your AE.

Equal Housing Lender | Turn time estimates are subject to change without notice at STG Mortgage dba AT Lending's sole discretion. Program rates and parameters are subject to change without notice. Turn times are estimates and are not or guaranteed. STG Mortgage dba AT Lending | 765 The City Drive S, Suite 200, Orange, CA 92868 | 855.528.5363 | NMLS ID# 2091912, BRE# 02139403.