

How to Upload Conditions via TPO Portal

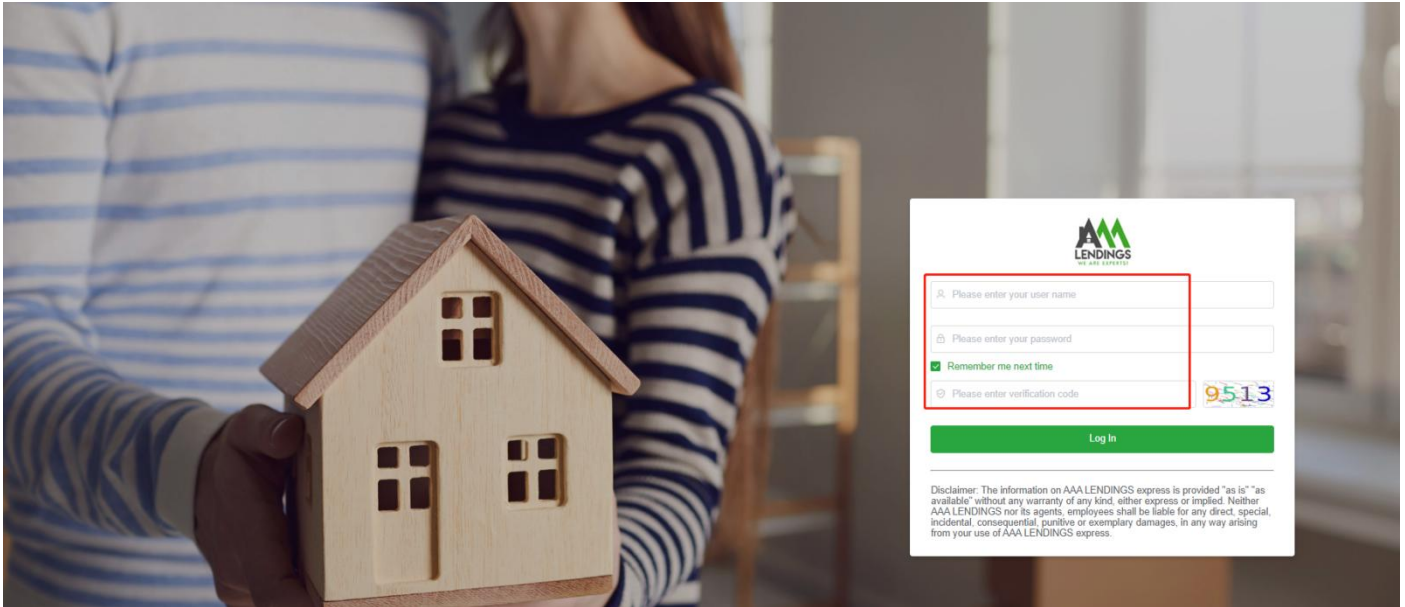
Thank you for choosing AAA LENDING. It is our goal to provide you with the best service. Please use this guide to help with the loan process about how to upload conditions via TPO Portal. If you have any questions, please contact your Processor or Coordinator.

If you're unsure how to upload the condition documents or encounter any issues, you can also email them to your Processor or Coordinator for assistance.



Step 1. Find the subject file.


1) Navigate to TPO Portal (<https://main.aacapitalinvestment.com>) and login.



2) Search for the subject file using criteria such as Loan No., Borrower, or Subject Address, then click on the file to access the detailed loan case information page.

Loan No.	Channel	Borrower	Current Status	Status Date	Activity or Not	Loan Type	Loan Purpose	Loan Amount	Rate	Lock Exp.	Action
test3			Registered	10/18/2024	Active	FNMA/FHLM...	Purchase	\$322,520.00	5.875		Status Control
testes122			Registered	10/17/2024	Active	FNMA/FHLM...	Rate/Term	\$1,114,500.00	5.375	11/16/2024	Status Control
testes122			Initial Approval	10/17/2024	Active	Bank Statem...	Rate/Term	\$1,114,500.00	6.250		Status Control
testes12			Suspended	10/17/2024		Self Prepare...	Purchase	\$500,000.00	6.875	11/11/2024	Status Control
testes1	AAA / AAA LENDINGS	Test Ais	Submitted	10/15/2024		FNMA/FHLM...	Rate/Term	\$447,500.00	6.375	11/16/2024	Status Control

Step 2. Upload Condition Documents

- 1) Open the Folder Icon “” to upload the condition documents; follow steps 3-6 described below.
- 2) Submit the condition documents by following steps 7-8 described below.

Important Note!!! Please make sure to click the "Submit" button in step 8. Otherwise, the Underwriter won't receive a notice for review.

The screenshot displays the LENDINGS web application interface. The sidebar on the left contains navigation options, with 'Conditions' highlighted. The main content area shows a table with columns: Loan No., Borrower, Program, Status, Note Rate, DTI, and LTV / CLTV / HCLTV. Below this, there are sections for 'UW-PTD Conditions' and 'Lender Conditions'. The 'UW-PTD Conditions' section has a 'Submit' button and a red arrow labeled '2' pointing to a folder icon. The 'Lender Conditions' section also has a 'Submit' button. A second screenshot shows the 'UW-PTD Conditions' section expanded into a table with columns: Upload File, Type, Code, Condition Descriptions, Created Time, and Status. A red arrow labeled '1' points to the 'Conditions' menu item in the sidebar, and a red arrow labeled '3' points to a folder icon in the 'Upload File' column of the table.

Upload File	Uploader	Note	Upload Date	Action
How to Do COC Through TPO Portal / (1), 10.18.2024, 11.15.53.pdf		Test	10/18/2024 11:15:54	Delete

Loan No.	Borrower	Program	Status	Note Rate	DTI	LTV / CLTV / HCLTV
testtest22		Bank Statement 30 Yr Fixed	Initial Approval	6.25%	0.466%	59.188% / 59.188% / 59.188%

Active	Cleared	Upload File	Type	Code	Condition Descriptions	Created Time	Status
<input checked="" type="checkbox"/>			UW-PTD Condi...	NOTE-M001	11231313131	10/17/2024 15:...	Pending
<input checked="" type="checkbox"/>			UW-PTD Condi...	NOTE-M002	3211131	10/17/2024 15:...	Pending
<input type="checkbox"/>			UW-PTD Condi...	CREDIT-M003	www	10/17/2024 15:...	Pending
<input type="checkbox"/>			UW-PTD Condi...	NOTE-M004	1231313131	10/17/2024 15:...	Pending