

WG.

WESTGEN LENDING

Documents & Conditions

Adding Documents

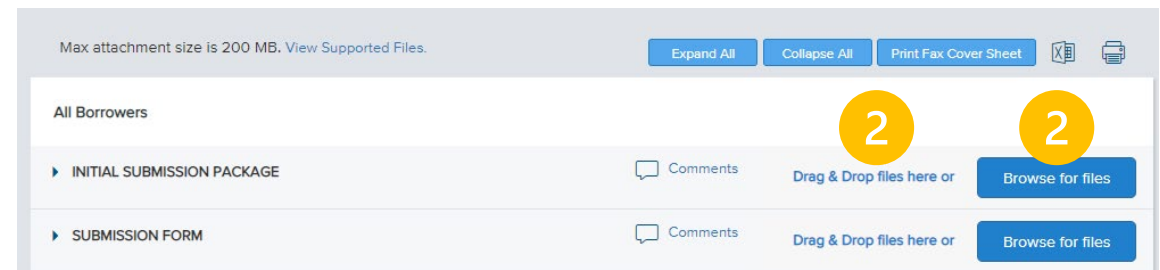
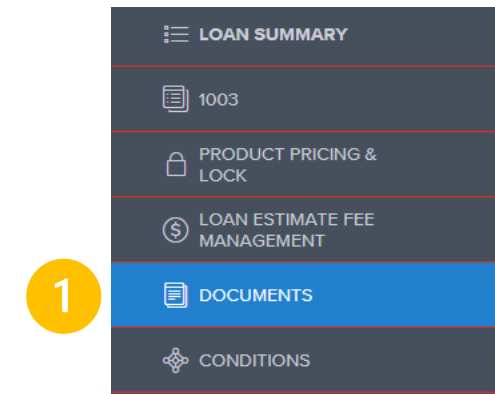
1. From the navigation tool on the left side of the screen, select Documents
2. Documents may be uploaded in two (2) different ways
 - Locate your saved documents on your desktop and Drag & Drop files here

Select [Browse for files] button to upload into the appropriate placeholder

You can upload multiple files at the same time.

Document Placeholders

- TPO-Initial Submissions Package is used when initially uploading document for submission to WestGen
- TPO-Resub Items is used to submit additional documents after the loan as been initially submitted and/or approved by WestGen
- Rate Lock Confirmation is used when the loan is locked. A copy of the rate lock confirmation will reside here.












Adding Documents

Expanding the Document Placeholder will reflect documents you've added as well as any documents added by WestGen

1. To view a PDF version of the document, click the file name
2. The files can be downloaded using the download icon

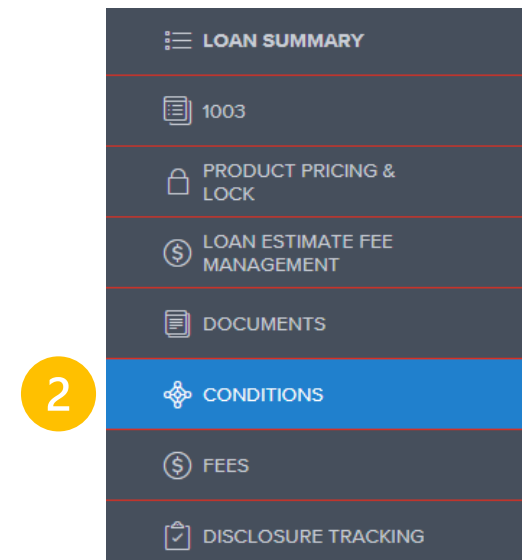
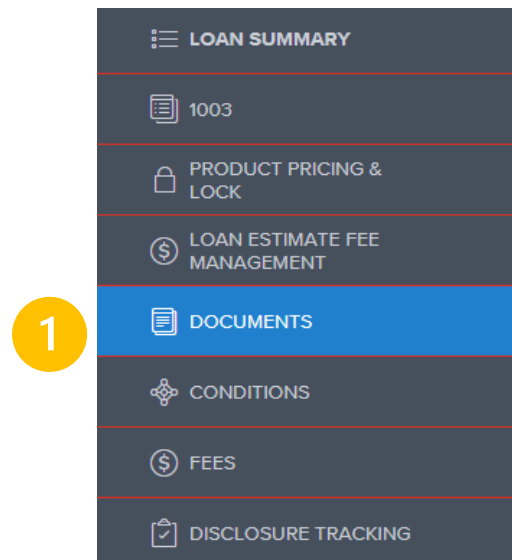
All Borrowers

▼ INITIAL SUBMISSION PACKAGE		Comments	Drag & Drop files here or	Browse for files
1	 banks sub form.pdf	338 KB 06/13/2019 11:06 AM Test, Chris	2	 
	 Banks 1008.pdf	317 KB 06/13/2019 11:06 AM Test, Chris		 
	 Banks 1003.pdf	11.32 MB 06/13/2019 11:06 AM Test, Chris		 

Reminder

There are two options when uploading conditions.

1. You can upload pdf documents or conditions under the Documents tab. You can upload multiple pdfs at the same time.
2. You can upload individual conditions via the Conditions tab, which is favored because it automatically sorts and indexes the conditions.



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Questions?

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