

After logging in to the **Delegated/Closed Loan Portal**, follow the steps below to upload loan documents:

1. On the left navigation pane, click **Closed Loan** and select **Deliver Loans / TDOCS** on the left side navigation toolbar.

Turn Times
Registration/Lock/Pricing
Current Rate Sheet
Closed Loan
Deliver Loans / TDOCS
Reporting
Resources *
Admin 🝷
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Logout

- *Note:* Pay special attention to the naming convention guidelines on the **Image Upload** screen. If the documents are not correctly named, they will not be associated with the correct loan file.
 - All **initial submission packages** must be named with the following naming convention: **SellerLoanNumber_BorrowerLastName_DescriptionofFile**.

Example: 123456789_Doe_Submission

• All trailing documents must be named with the following naming convention: SellerLoanNumber_BorrowerLastName_TDOC_DescriptionofFile.

Example: 123456789_Doe_TDOC_Appraisal

2. Click Upload Load Images to 6033-Bayview/Lakeview CLDD.

Upload Loan Images to 6033 - Bayview/Lakeview CLDD

Please note that individual files cannot exceed 115 MB in size; files above 115 MB may not be processed.

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Note: Alternately, to upload **trailing documents** directly to the loan file, use the **Loan Search** option found in the **Reports Menu** screen.

Reports Menu		
	●Loan Number ○Last Name	Search

• Once the file is opened, click **Upload files to this loan** and continue the steps below.



3. In the **Select files** dialog box, click **Add files** to search your computer for the required loan document(s).

Add files to the upload queue and click the start button.				
Filename	Size	Status		
Drag files here.				
Add Fire A Chedural and				
Add files I Start upload	0.6	0%		

Note: You can also drag files into the dialog box to add them.

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4. When the desired file displays in the dialog box, click **Start upload**.

Note: To delete a file that you may have mistakenly added, click the red circle.

H Select files Add files to the upload queue and click the start button.				
Filename	Size	Status		
123456789_Test_Appraisal.png	9 KB	0%		
		1		
Add files Add files	9 KB	0%		

5. Once complete, a pop-up window appears indicating that the upload is complete. Click **OK** to close.



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