

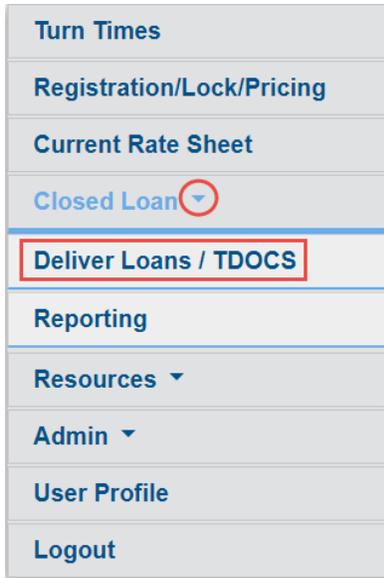
Deliver Loans and TDocs in LoanDock

Last Updated: January 31, 2024



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.



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.

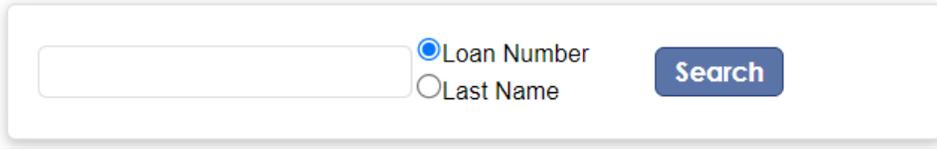
Example: 123456789_Doe_TDOC_Appraisal

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



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

Reports Menu



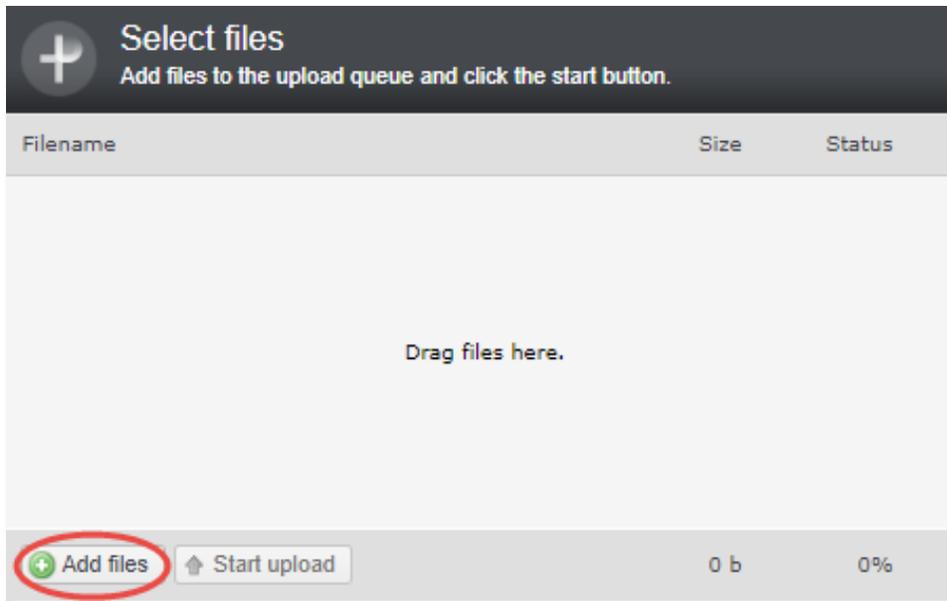
A search form with a text input field, two radio buttons labeled "Loan Number" (selected) and "Last Name", and a "Search" button.

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

Loan Images

Upload files to this loan

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



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

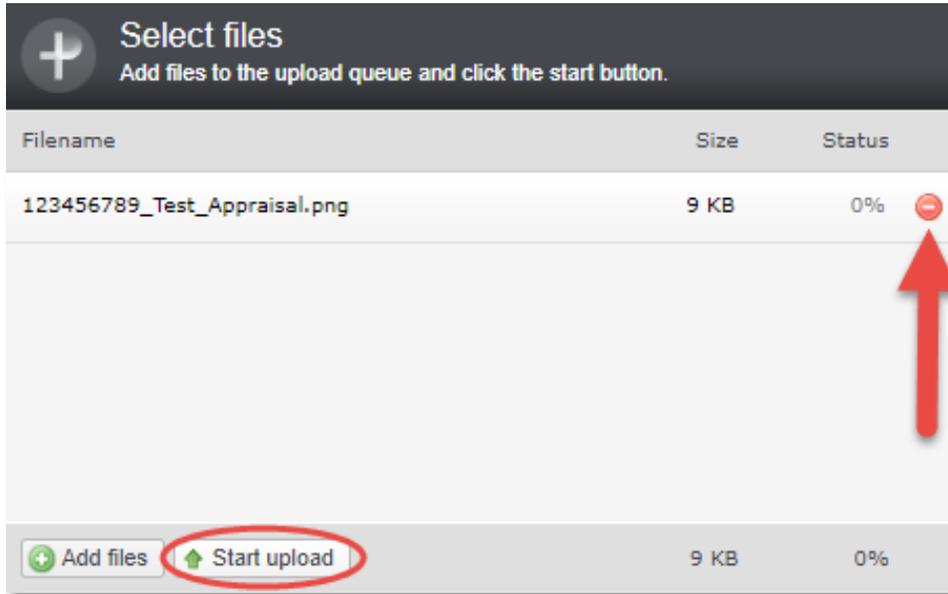
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4. When the desired file displays in the dialog box, click **Start upload**.

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



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

